REGIONAL TRAVEL OPTIONS

2012 Travel and Awareness

Quantitative Benchmarking Survey

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Executive Summary

In fall of 2012, Metro's Regional Travel Options (RTO) team, along with regional partners, engaged EnviroMedia Social Marketing (EnviroMedia) and Davis, Hibbitts & Midghall, Inc. (DHM Research) to assist in fielding a second tri-county travel and awareness survey. The intent of this research is to continue the process started in 2010 to better understand audience awareness and perceptions of travel options and benchmark changes in their overall use.

The 2012 survey followed a nearly identical series of questions from the original (2010) survey, with a few additions and modifications to address emerging topics and priorities for Metro and RTO partners. Total survey participation more than doubled, leading to a lower margin of error and a greater ability for sub-group analysis.

In general, the 2012 survey results helped solidify several assumptions and tracked closely with previous data trends. While daily drivers still represent more than half the area population, results show that regional travel option program awareness is making incremental gains since the 2010 survey.

TOP FINDINGS INCLUDE:

- ***Daily drivers use travel options too.*** Even daily drivers have experience using travel options: 32% walk for transportation trips daily, weekly or monthly; 16% use transit daily, weekly or monthly; and, 6% bicycle for transportation trips daily weekly or monthly. RTO has a ripe audience for programs, services and strategies to help drivers make more use of travel options.

- ***Travel options are most popular for errands/leisure.*** Travel options users were twice as likely to bicycle, walk or ride public transportation for errands or leisure activities than for commuting to work or school. Most travel options users were satisfied with their experiences; however, safety is a common dissatisfaction across active modes.

- ***Gen Y behaviors are changing the travel landscape.*** The highest percentage of use and potential for adopting travel options were among younger adults 16-24, reflecting national trends around Generation Y travel habits. This generation uses digital information sources (websites, smartphones). This is also the audience that is in line to affect most travel behaviors in the next 5 years as they age.

- ***Some gender differences remain.*** Men and women both show similar travel habits, with the exception of bicycling, in which men were twice as likely to bicycle for transportation compared to women.

- ***Regional travel options programs are gaining awareness.*** RTO programs continue to gain in awareness, with TriMet's Trip Planner, Drive Less Save More, and Sunday

Parkways/Sunday Streets garnering the highest awareness, yet most programs still have less than 50 percent awareness across the region.

- ***Occasional users represent growth potential.*** Bicyclists, walkers and public transit riders who use modes on a weekly or monthly basis were identified as a market for RTO that would require fewer resources to increase use of travel options. They were motivated to reduce their car trips to “save money” and “to be healthier.”

- ***Commuters have considered their options.*** Without a car, 41% would commute by transit. Nearly one-third (32%) of drivers who don’t currently carpool said they would be likely to start carpooling in the next 6 months if an incentive of $50 per month was offered. Over one-quarter (28%) were aware of their employer’s transportation options program; however, 67% said their employer does not offer financial incentives for any mode. RTO supports an incentive-based approach; however, the survey asked commuters who do not pay for parking what they would do if their parking cost was $25 per month. Parking supply and cost is part of a larger transportation and land use discussion; and this particular study found that even at the small cost of $25 per month, 37% said they would switch to travel options like biking, transit, walking or carpooling.

- ***Cross-awareness.*** When looking at RTO partners’ three largest investments — Drive Less Save More, Portland SmartTrips and employer programs — the data shows nearly two-thirds of respondents (65%) were aware of at least one of the three areas and just over one-third (35%) were unaware of all three. Only 6% of respondents were aware of all three areas indicating low levels of cross-awareness among these three areas.

- ***There is interest to learn more.*** When respondents were asked how interested they were in learning more about a range of travel options in their neighborhood, nearly a quarter (24%) of respondents expressed interest.

Results from this study will be used to guide Metro and RTO regional marketing efforts, allowing the communications team and partners to better understand the demographic make-up and travel habits of those currently using options on a regular basis as well occasional users with potential to convert to more frequent travel options use.

Introduction & Purpose

Based on an independent evaluation of Metro's Regional Travel Options (RTO) programs and measurement methods by Portland State University's Center for Urban Studies (CUS), RTO conducted a regional survey to take a snapshot of program awareness, similar to other regions in the United States and Canada. The data from the survey was intended to provide an outside, public perspective on the awareness, adoption and effectiveness of RTO programs.

This survey tracked awareness of Regional Travel Options (RTO) programs, measured satisfaction with using transportation options, examined traveler information tools and commuter resources, and tested marketing messages. Survey data is currently being utilized by Metro's RTO Collaborative Marketing Group to help inform marketing and communications strategies in partnership with EnviroMedia Social Marketing for FY14 campaigns and collaborations with existing programs and stakeholders.

OBJECTIVES

There were several objectives that helped shape this survey:

1. Measure awareness and use of RTO programs
2. Identify markets (audiences) willing to reduce single-occupant vehicle (SOV) trips
3. Better understand factors leading to the adoption of active travel options – demographics, information sources, user satisfaction, messaging, etc.
4. Inform implementation of the RTO Strategic Plan and synergistic marketing strategies
5. Use results to inform 2013 travel options grant applications
6. Benchmark trending results over time

This report presents data in four major sections—awareness of RTO programs, motivations and messaging, general travel options use, and conclusions and recommendations. The awareness section examines awareness of RTO programs and provides comparisons from the 2010 survey. The motivations and messaging section explores different types of messaging aimed at reducing car trips. The travel habits section highlights general travel options use with a profile of users. Conclusions and recommendations complete the report with specific recommendations for future survey work.

Method

Metro, in collaboration with EnviroMedia and DHM Research, developed a 114-question telephone survey—designed to evolve the original travel options survey conducted in 2010—while still providing benchmarking results. Based on findings from the initial 2010 survey, a handful of questions were revised or deleted, while new questions were added to measure awareness of new programs and gain greater insight into respondents' motivations and response to key messages.

RESEARCH DESIGN

Between October 16 and October 23, 2012 DHM Research conducted a telephone survey of **581 residents** living within Metro's tri-county service area. The survey took an average of 13.5 minutes to administer. The sample size is sufficient to assess opinions generally, and allows a review by multiple subgroups including age, gender, and other demographics.

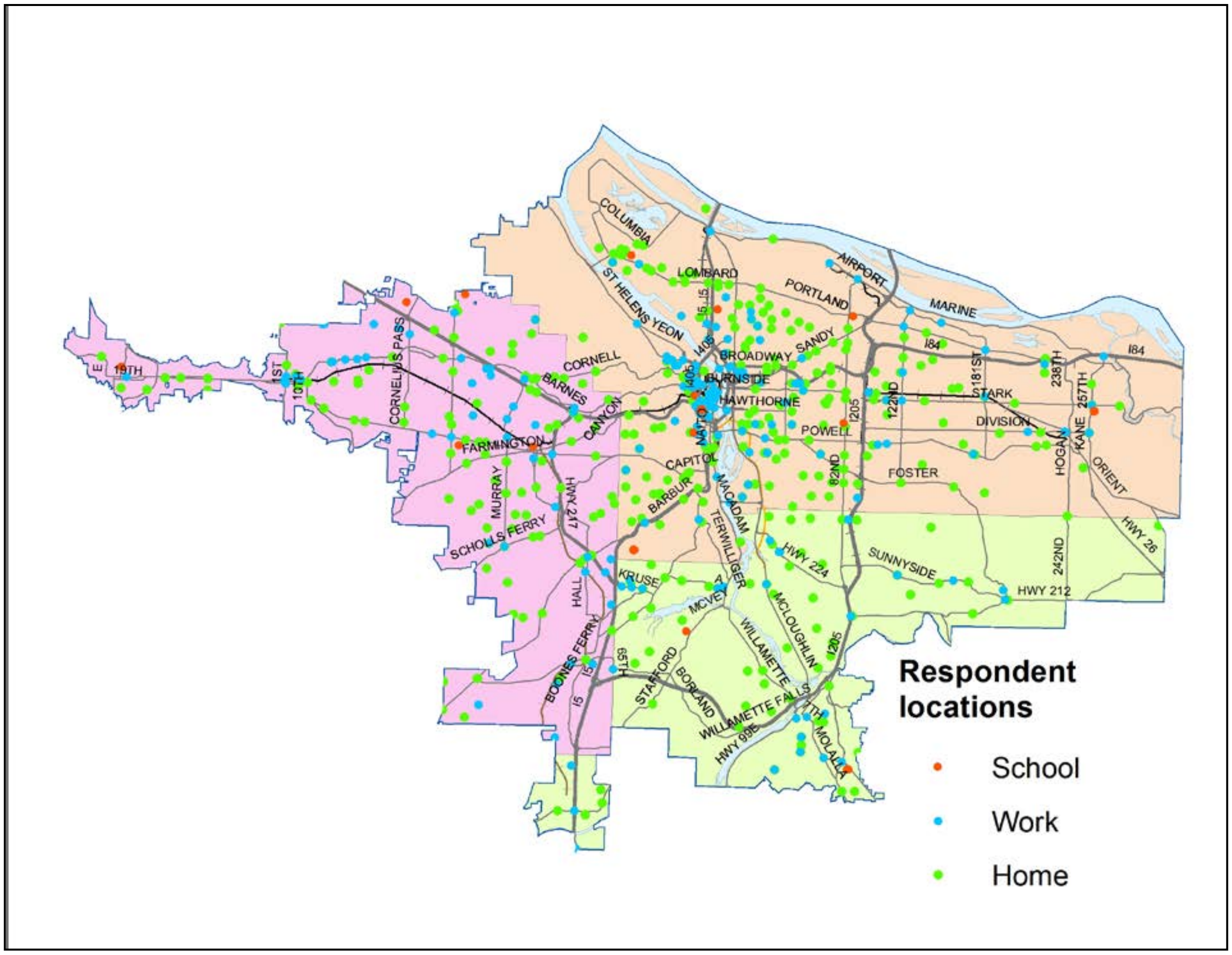
Residents were contacted randomly using random digit dialing and cell phone samples. In gathering responses, a variety of quality control measures were employed, including questionnaire pre-testing and validations. For a representative sample, quotas were set by age, gender, and geographic area. Post survey, DHM noticed a slight variation in age from 2010 US Census data and applied an industry-standard weighting technique to represent residents of the region.

Please note that results may add up to 99 percent or 101 percent due to rounding. Some questions allowed multiple responses and are noted. Some questions or response categories were added after the pilot test, which means a few questions were not asked of up to 32 respondents.

Any sampling of opinions or attitudes is subject to a margin of error. **For a sample size of 581, the margin of error for each question falls between +/-2.4 percent and +/-4.1 percent, at the 95 percent confidence level.** The reason for the difference lies in the fact that, when response categories are relatively even in size, each is numerically smaller and thus slightly less able – on a statistical basis – to approximate the larger population.

Respondents were asked at the end of the survey to give a nearest cross street to their home and work or school location (if applicable). Locations were then geocoded (Table 1).

Table 1: Portland Metro Region Geo-coded Home, Work, and School Locations



Locations were assigned a Context Tool score (similar to Walk Score) that is associated with transit services, proximity to bicycling and pedestrian infrastructure, parks, services and amenities. During analysis, the Context Tool composite scores were split by above and below average. An above average score indicates the home or work location has good travel options infrastructure and nearby amenities (e.g., downtown Gresham, downtown Hillsboro, close-in Portland). A below average score indicates the location has less travel options infrastructure and has fewer services and amenities.

DEMOGRAPHICS

Survey participants reflected the demographic profile of the region consistent with the most recent 2010 US Census data. The following provides an overview of participation by a range of geographic and demographic qualifiers:

County

21%	Clackamas
46%	Multnomah
33%	Washington

Age

24%	16-24
32%	25-44
27%	45-64
17%	65+

Gender

48%	Male
52%	Female

Racial Background

79%	White
1%	Black or African American
4%	Asian
1%	Native Hawaiian or Pac. Islander
1%	Am. Indian or Alaska Native
3%	Hispanic (voluntary response)
3%	Multi-racial or bi-racial
9%	Other or Refused

Hispanic, Latino or Spanish Origin

5%	Yes
89%	No
6%	Refused

Twelve percent (12%) responded that they speak a different language at home – most commonly Spanish (25%), Russian (9%) or German (8%).

Household Income (annual)

11%	< $25,000
17%	$25,000 - $49,000
17%	$50,000 - $74,000
14%	$75,000 - $100,000
18%	> $100,000
22%	Don't know or refused

Work Status

53%	EMPLOYED: full or part time
11%	STUDENT: full or part time
36%	UNEMPLOYED: not working / retired (28%) homemaker (5%) other (3%)

Housing Status

19%	Rent
77%	Own
4%	Don't know or refused

Housing Classification

81%	Single family detached
10%	Apartment building (3+ units)
3%	Duplex
2%	Condo or townhome
1%	Mobile home
4%	Other, did not know or refused

Household size

11%	1 person
25%	2 people
25%	3 people
18%	4 people
11%	5 people
7%	6+ people
Avg.	3.1 people

RTO Program Awareness

To measure awareness of RTO programs by Metro-area residents, survey participants in 2010 and 2012 were asked whether they had seen or heard anything about several key RTO programs, listed below. Carsharing, TriMet's Trip Planner and Safe Routes to School were also tested because they compliment RTO efforts. Results from both surveys were compared to measure the change in awareness over time. Because new RTO programs were added after 2010, some data will not be available until the next follow-up study is conducted. It is relevant to note that Carpool Match NW was rebranded and tested in 2012 as Drive Less Connect. As a result, change in audience awareness cannot be accurately measured at this time. Table 2 is sorted from highest to lowest awareness in 2012.

Table 2: Program Awareness

	2010 (N=250)	***2012 (N=581)***	*CHANGE*	*2012 Awareness by County*		
	AWARE	***AWARE***	*+/- percentage points*	*Mult.*	*Wash.*	*Clack.*
Carsharing such as… zipcar CAR2GO	N/A	**71%**	new	78%	64%	67%
TriMet Trip Planner	59%	**66%**	+7	72%	60%	62%
Drive less. Save more.	34%	**48%**	+14	45%	48%	52%
Portland Sunday Parkways	N/A	**40%**	new	53%	27%	34%
Bike Commute Challenge	11%	**30%**	+19	38%	24%	23%
Portland SmartTrips	18%	**22%**	+4	29%	14%	17%
Safe Routes to School	N/A	**22%**	new	28%	15%	19%

	2010 (N=250)	**2012 (N=581)**	CHANGE	2012 Awareness by County		2010 (N=250)
	AWARE	***AWARE***	*+/- percentage points*	*Mult.*	*Wash.*	*Clack.*
WALK THERE!	10%	**20%**	+10	26%	13%	20%
BIKE THERE!	15%	**19%**	+4	25%	14%	15%
Drive less. Connect.	N/A	**17%**	new	19%	16%	17%
CarpoolMatchNW.org LOG ON · MATCH UP · DRIVE OFF	9%	**N/A**	---	N/A		

Awareness has increased over time for all programs tested in 2012. The largest shifts in awareness occurred with the BTA Bike Commute Challenge, Drive Less Save More and the Walk There! guidebook, which saw 19, 14 and 10 percentage point gains, respectively. The survey also showed a modest 4 percentage point change in awareness for Portland SmartTrips and the Bike There! map, but these results fall within the margin of error and are not statistically significant. Respondents who live and work in areas with better than average infrastructure, services, and amenities (analyzed using Metro's Context Tool scoring) had a higher awareness of RTO programs than those living and working in areas with below average context scores. One exception was awareness of Drive Less Save More, which showed greater awareness in below average context scores.

Carsharing services

Carsharing in the Portland Metro region is carried out by private companies that occasionally partner with RTO. These companies share RTO's goal to reduce reliance on automobiles within the region. With 71% awareness, carsharing programs like Zipcar and car2go were the most recognized of all the RTO related programs in 2012, especially within Multnomah County where carsharing vehicles and services are readily available. However, despite high awareness, 85% of survey respondents who were aware of carsharing said they do not use it.

TriMet Trip Planner

The TriMet Trip Planner is a primary tool used by transit users in the Portland region so it was not surprising to see widespread awareness in 2010 and a seven (7) percentage-point increase in awareness since 2010. Predictably, the TriMet Trip Planner had highest awareness among current transit users, and particularly among Multnomah County residents (72%), where TriMet service is widely available. Awareness was higher among women (73%) as compared to the men (59%). Awareness was also higher for adults 44 years-old and younger (73%). Most respondents (63%) reported using this tool to plan transit trips.

Of those who were aware of TriMet's new multi-modal Map Trip Planner (which allows planning and mapping combined transit and bike trips, as well as bike-only and walk-only trips), 17% used it to plan trips that combined transit and bicycling, while 31% used it for walk-only trips. Though a relatively small number of respondents (42) were asked whether they were satisfied with using the TriMet Map Trip Planner, 99% were either "very satisfied" or "somewhat satisfied."

Drive Less. Save More.
Since 2010, awareness of the Drive Less Save More campaign increased by 14 percentage-points to 48%. Of those who were aware of the campaign in 2012, 40% reported seeing or hearing about the campaign on television, in a commercial or on the news. The campaign registered the highest awareness among older adults 45-64 (56% aware), among white residents (52% aware), among Clackamas County residents (52% aware) and among women (52% aware).

Sunday Parkways/Sunday Streets
The Sunday Parkways/Sunday Streets program showed 40% awareness in 2012. Multnomah County residents had the highest levels of awareness, likely because the program was offered throughout many neighborhoods in the City of Portland. Residents aged 25-64 with middle incomes ($25,000-$74,000) were also more likely to be aware of the program. It is also noteworthy that approximately 50% of respondents who were aware of the Sunday Parkways/Streets program were individuals who were infrequent drivers, weekly or monthly bicyclists, or willing to consider carpooling.

The Bicycle Transportation Alliance Bike Commute Challenge
The BTA Bike Commute Challenge had the largest increase in awareness since 2010, compared to other RTO programs. The 19 percentage-point increase occurred among Multnomah County residents aged 25-64 who have access to a bike. While it was not asked whether respondents who were aware of the program actually participated in it, 8% responded "yes," to being motivated by the program to commute year-round by bike.

Portland SmartTrips
Portland SmartTrips did not see a statistically significant increase in awareness (four (4) percentage points since 2010). Those who were aware of the program were more likely to be transit riders and walkers, familiar with Sunday Parkways/Sunday Streets, and interested in learning more about travel options.

Safe Routes to School
Safe Routes to School showed 22% awareness in 2012, registering highest among women and Multnomah County residents. Individuals who were aware of this program were also likely to

be aware of Sunday Parkways. Of those who reported having heard of the Safe Routes to School program, 31% were encouraged to walk or bike more for school trips. Those residents 25-44, with incomes $100,000+ and non-white indexed higher than the general population — although caution should be advised as demographic sub-groups for this question reflected small sample sizes which may lead to a wider margin of error.

Walk There! Guidebook and App

Metro's Walk There! guidebook is at 20% awareness and could have as high as a 10 percentage-point increase since 2010; however, the 2012 question included both the Guidebook and new smartphone app. Of those respondents who were familiar with the Walk There!, 68% were aware of the physical guidebook, and 23% were aware of the companion smartphone app available online. Together, the tool is effective and 32% of respondents reported walking to more places or discovering new routes because of the book or app. Individuals most likely to be aware of the tools were middle age to older adults ages 45-64 (30% aware), women (25% aware) and Multnomah County residents (26% aware).

Bike There! Map

The Bike There! map awareness was measured at 19% in 2012 and showed a 4 percentage point increase in awareness since 2010, which is not statistically significant. Of respondents who were aware of the map, 26% became aware of the tool by word of mouth from other users, and another 18% saw it at a bike shop. Fifteen percent (15%) of individuals who were familiar with the map reported biking more places because of it. Multnomah County residents (25% aware), those with access to a bike (22% aware), and those with higher household incomes ($75,000-$100,000+ 27% aware; $100,000+ 23% aware) were more likely than other groups to be aware of the map.

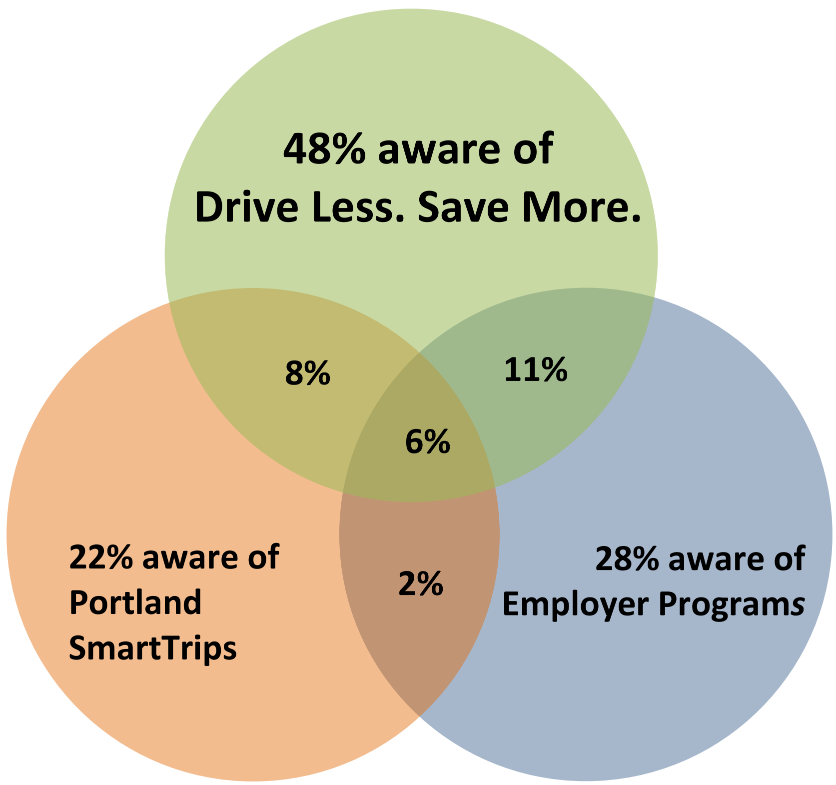
Drive Less Connect

Carpool Match Northwest was tested in 2010 but was discontinued. A new online tool was implemented by the State of Oregon which included a carpool matching database called Drive Less Connect, which was launched in 2010. As a result, change in audience awareness over time cannot be accurately measured. An analysis of 2012 responses show that the program has 17% awareness, and those individuals with the highest awareness were older residents ages 45-64 (25% aware) and those who have lived in the Portland Metro area for more than a decade (20% aware). They were also familiar with Drive Less Save More (29% aware of DLC also aware of DLSM) and Sunday Parkways (25% aware of DLC also aware of Sunday Parkways). Thirty percent (30%) of residents who were aware of Drive Less Connect recalled seeing or hearing about the program on television, while 11% read about it online. Of those who have used the program, 17% claim the program helped them make fewer trips by car.

CROSS-AWARENESS

When looking at RTO partners' three largest investments — Drive Less Save More, Portland SmartTrips and employer programs — the data shows nearly two-thirds of respondents (65%) were aware of at least one of the three areas and just over one-third (35%) were unaware of all three. Only 6% of respondents were aware of <u>all three</u> areas (as reflected in table 3 below), indicating low levels of cross-awareness.

Table 3: Cross-Awareness



Motivations & Messaging

To better understand what motivates area residents to consider reducing the amount they drive, a close-ended question was asked to determine whether audiences would be more responsive to messages about the money savings, time savings, health benefits, or friends and family influences of driving less. In order to better understand each response, an additional question was added to the 2012 survey, asking respondents to define or quantify the benefits they believed they would gain by driving less. Answers to these questions help provide direction when crafting different messages that may resonate best with different audience groups.

SAVE MONEY

Most respondents across the region (41%) said their primary motivation to drive less is to save money on vehicle and parking expenses. Saving money was also the top choice in 2010. On average, they believe driving less would save them $26.00 per week (or approximately $1,350 per year). The following findings identify audiences most receptive to a money-saving message.

- Younger adults (16-44) and those with middle household income levels ($50,000 to-$74,000 per year)
- Daily drivers who would choose public transportation or carpooling if they had to go without a car.
- Those already aware of the Drive Less Save More campaign, which promotes a similar “saving” message
- Saving money resonated most among people living and working in areas with above average Context Tool scores.

The survey asked commuters who do not currently pay to park, what they would do if they were charged. The majority of commuters (86%) do not currently pay to park at work or school. If these commuters had to pay $25 per month for parking, 37% said they would switch to another mode of transportation like biking, transit, walking or carpooling. Others (39%) said they would keep driving and pay the extra cost. Those most likely to switch to travel options because of a $25 per month parking cost appear to be young adults 16-24 (63%), those with household incomes of $25,000 or less (56%) as compared to daily drivers (29%) and adults 25-44 (23%). It is important to note that respondents who work in areas with below average Context Tool scores were more likely to switch to carpooling when faced with a $25 monthly parking fee—those working in areas with higher than average Context Tool scores were more receptive to taking transit.

Of the 12 percent of respondents who <u>do</u> pay to park at work or school, 60 percent said they would keep driving and pay the extra cost if their parking fees increased by $25, while 34 percent would switch to another mode of transportation like biking, transit, walking or carpooling. Because this sub-group represents a small sample size (less than 50 respondents), further demographic analysis was not feasible.

BE HEALTHIER

Driving less to be healthier was a motivating factor for 24% of respondents. Forty-five percent (45%) of these individuals want to drive less to get more exercise, 21% want to improve their cardio or heart health (mentioned more frequently by men than women) and 17 percent want to lose weight or get fit. Respondents choosing "to be healthier" as their motivation tended to be:

- 45-64 years old (31% chose "healthier" compared to 24% of the general population)
- Higher-income households (38% chose "healthier" in the $100,000+/year category)
- Infrequent drivers (31% chose "healthier"), those who bike weekly or monthly (55%) and those who walk weekly or monthly (36%)
- Individuals who were aware of the Sunday Parkways program (31% chose "healthier"), which also promotes the physical benefits of active transportation.
- Be healthier resonated most among people commuting to work locations with below average Context Tool scores.

Marketing efforts can consider these demographics to help identify the audience that will be most responsive to a health-related message.

SPEND LESS TIME IN TRAFFIC

Twelve percent (12%) of respondents stated that they would be motivated to reduce the amount they drive to spend less time in traffic. On average, they believe they could avoid 45 minutes of time spent in traffic per week by cutting back on driving – approximately one-and-a-half days per year. As a stand-alone reason for driving less, reducing time spent in traffic does not appear to be a strong motivator, and results showed this option only resonated slightly more than the population average among a few demographic sub-groups (adults 45-64, households with more than one car per adult household member and minority residents.) This message may be more effective when paired with saving money or health benefits.

FRIENDS AND FAMILY

Only 4% chose "because friends and family encouraged me to drive less." Not enough data is available to consider sub-groups. This answer choice may capture "norming" which has been a factor in the success of non-smoking and recycling campaigns. Other research may be needed to estimate how much influence peers, friends or family members have on driving habits.

"DON'T KNOW"

The 18% of respondents who did not choose "save money," "to be healthier" or "spend less time in traffic" were asked a follow-up question to determine the kind of messaging that *would* motivate them. The majority were unable to identify a motivational message to reduce their driving. Seventeen percent (17%) percent felt they already don't drive much, and the data supports this. Those respondents tend to walk, use public transit or carpool, so they may represent an audience that further marketing is not needed for; or, higher-level benefits of driving less may encourage them to encourage others to drive less. 'Not knowing' was highest among seniors 65+ and those with household incomes less than$50,000/year. These are sub-groups that likely optimize their travel and take few discretionary trips.

MOTIVATED TO LEARN MORE ABOUT TRAVEL OPTIONS

When respondents were asked how interested they were in learning more about a range of travel options in their neighborhood, nearly a quarter of respondents expressed interest.

7%	**Very interested**
17%	**Somewhat interested**
19%	Not too interested
51%	Not at all interested

Sub-groups who expressed higher-than-average (higher than 24% very/somewhat interested) interest in learning more about travel options include those biking weekly or monthly (36% very/somewhat interested), walking weekly or monthly (32% very/somewhat interested), or riding public transit weekly or monthly (35% very/somewhat interested). Of those who were very or somewhat interested, they were evenly motivated by messages to save money (41%) and to be healthier (38%). Of those who said they were interested, 60% were female and 40% were male. They also are more likely in the 25-44 age range (41%) and least likely in the 65+ range (8%). Of those who speak a different language at home, 40% said they were very/somewhat interested in learning more about travel options. A higher percentage of respondents living in above average Context Tool score locations answered very or somewhat interested (32% vs. 20%). This was also true based on work location scores but to a lesser degree (35% vs. 28%).

FREQUENCY OF USING TRAVEL OPTIONS

Part of this survey was to gauge frequency of using travel options region-wide over time. In general, results show gradual shifts in travel options toward active transportation modes, similar to more recent and more statistically rigorous Metro survey data[1]. The shifts observed from the RTO survey data are within the relative margin of error and should be evaluated over time to determine ongoing trends.

MODES OF TRANSPORTATION

The survey measured how frequently respondents drove a car, biked, walked or used public transportation for all trip purposes except for recreation or exercise. It is important to note that participants were not asked to record actual trips using a travel diary, but instead were asked how frequently they used various modes of transportation over the course of one year. Segmenting travel patterns into daily, weekly, monthly, rarely, and never categories (as seen in table 4 below) allows for analyzing profiles for each travel option including motivating messages, traveler information sources, and RTO program awareness.

Table 4: Respondent Travel Habits

	DAILY	*WEEKLY*	*MONTHLY*	*RARELY*	*NEVER*
CAR / DRIVING	**54%**	**31%**	**3%**	4%	7%
	Daily, Weekly or Monthly = 88%			Rarely or Never = 11%	
	DAILY	***WEEKLY***	***MONTHLY***	***RARELY***	***NEVER***
BICYCLING	**3%**	**6%**	**7%**	13%	72%
	Daily, Weekly or Monthly = 16%			Rarely or Never = 85%	
	DAILY	***WEEKLY***	***MONTHLY***	***RARELY***	***NEVER***
WALKING	**13%**	**20%**	**13%**	21%	34%
	Daily, Weekly or Monthly = 45%			Rarely or Never = 55%	
	DAILY	***WEEKLY***	***MONTHLY***	***RARELY***	***NEVER***
PUBLIC TRANSIT	**7%**	**13%**	**12%**	32%	37%
	Daily, Weekly or Monthly = 32%			Rarely or Never = 69%	

[1] 2011 Oregon Household Activity Survey, Metro region portion.

Transportation by car remains the most common frequently used travel option throughout the region with over half (54%) of respondents classified as *daily drivers*. Walking as mode of transportation was the second most common response with nearly half (45%) of respondents walking on a daily, weekly or monthly basis.

Respondents who reported using travel options ***daily, weekly*** *or* ***monthly*** have been grouped together and classified as <u>drivers</u>, <u>bicyclists</u>, <u>walkers</u> or <u>transit riders</u> throughout this report. The following section provides high-level findings related to each travel options user segment. A more detailed audience profile can be found in the *Detailed Analysis* section of the report.

TRAVEL OPTION PROFILES

This section provides a profile of individuals who use four modes of transportation: drivers (and carpoolers), bicyclists, walkers, and public transit users. The profile also includes an assessment of what motivates current drivers (and carpoolers), bicyclists, walkers and public transit users to drive less, as well as their levels of satisfaction which may encourage or prevent them from using transportation options more frequently. Information about motivators and barriers from the 2011 focus group findings was also included in this section of the report.[2]

Please note that percentages may not add to 100 percent – survey respondents were allowed to select multiple transportation options, so someone who is a daily driver and weekly transit rider was calculated as a member of both mode segments (driver and transit rider).

DRIVERS

Respondents who reported using a car for transportation ***daily, weekly** or **monthly*** have been classified as "drivers." The following provides a detailed profile of the general driver audience segment across several key areas of the study.

Driver profile

Eighty-eight percent (88%) of respondents were daily, weekly, or monthly drivers. Daily drivers tend to be adults ranging from 25-64 years old who were employed full or part time and have household earnings between $50,000-$100,000. Seventy-seven percent (77%) of daily drivers have lived in the Portland metro area for more than a decade.

Results show that transportation by car remains the most frequently used travel option throughout the region with over half the sample (54%) were daily drivers. The survey also found that 32% of daily drivers walk daily, weekly or monthly, 16% use transit daily, weekly or monthly and 6% bike daily, weekly or monthly.

Support for commuters to use options:

- Of the 69% of commuters who drive alone, 83% of them were daily drivers (83%).
- 9% of commuters said their employer offers an incentive to carpool or vanpool; however, only 3% of commuters who drive said they carpool either as an organized carpool or with people outside of the household (10% said they carpool with someone in their household).
- 67% of commuters said their employer does not offer financial incentives for any mode; 8% said they did not know if their employer offered an incentive.
- 34% of commuters said they have seen information about travel options at their workplace or school.
- 30% of commuters said they're able to work from home some days.
- 22% of commuters said their employer offers an Emergency Ride Home.

[2] 2011 focus group report: http://library.oregonmetro.gov/files//metro_rto_research_summary_--june.pdf

- Commuters who work in areas with above average Context Tool scores have greater employer support with respect to bike, walk, and transit incentives.

Commute options show potential:

- 30% of drivers have considered car/vanpooling with the most receptive being daily drivers.
- 70% of those who commute by driving alone have access to a bicycle.
- 30% of commuters were able to work at home on some days.
- 41% of commuters would use public transit if they didn't have access to a car.
- 70% of those who commute by car alone have access to a bicycle.
- The majority of individuals who were receptive to considering carpooling or were likely to start carpooling with incentives were employed full- or part time.

Motivations and messaging:

- 44% of daily drivers chose saving money on vehicle and parking expenses to reduce the amount they drive as their primary motivation to reduce their driving.
- On average, individuals who were motivated by money savings believe they can save approximately $26.00 per week (or approximately $1,350 per year) by reducing the amount they drive[3].
- 22% of daily drivers were motivated to reduce driving because of the health benefits.
- Thirteen (13%) of daily drivers were motivated to drive less in order to reduce time in traffic.
- On average, those who said "to spend less time in traffic" believe they can save approximately 61 minutes each week (over 52 hours or two days annually[4]) by reducing the amount they drive.

How drivers get information:

Most drivers get updated travel information for driving equally from news, radio or TV broadcasts (46%) as they do from digital sources (websites and smartphone apps, 47%). There may be an opportunity to promote "drive less" messages via these channels. For example, radio announcements for traffic and weather reporters, press releases, video news releases and online or mobile ads targeted at regional users of specific traffic and weather apps.

Awareness of RTO programs and related services by drivers:

Drive Less. Save More.

Nearly half (47%) of daily drivers were aware of Drive Less Save More. Most daily drivers said they most recently saw the campaign on television (35%) which may reflect Carefree Commuter

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3 Respondents estimated well below estimates of the average annual cost to drive which perhaps means they could reach their savings goals quickly. "The average cost…[was] $8,946 per year, based upon 15,000 miles of annual driving." Source: AAA, April 2012, http://newsroom.aaa.com/tag/your-driving-costs/

4 Respondents estimated well above the time they likely get stuck in congestion. "The average commuter spent an extra 38 hours traveling in 2011 [due to congestion]." Source: http://d2dtl5nnlpfr0r.cloudfront.net/tti.tamu.edu/documents/mobility-report-2012.pdf

Challenge advertising during late spring 2012. Only 4% of daily drivers said they most recently saw Drive Less Save More online, 2% saw bumper stickers and 2% said they heard it “word of mouth.”

Drive Less Connect
Drive Less Connect was launched in June 2010. As of fall 2012, 12% of daily drivers were aware of Drive Less Connect. Daily drivers were more receptive than other groups to consider carpooling, so there may be an opportunity to attract them to consider using this online service which includes carpool matching.

Portland SmartTrips
Awareness of Portland SmartTrips rose from 18% to 22% among the regional population and daily drivers’ awareness was right in between (20%). The lower awareness by daily drivers is within the margin of error. Although Gresham SmartTrips and Discover Wilsonville took place between the 2010 and 2012 RTO surveys, only Portland SmartTrips was tested for awareness to be consistent in both surveys.
Carsharing
Carsharing data for drivers is consistent with the general population. Seventy-one (71%) percent of respondents were aware of carsharing services, but only 15% claimed to have used it for specific trip purposes. High awareness but low participation indicates that marketing efforts and messaging should likely evolve and create desire for the regionally available programs like Getaround, and for Zipcar and car2go to expand out of inner-Portland neighborhoods.

BICYCLISTS

Respondents who reported using a bicycle for transportation ***daily, weekly*** *or* ***monthly*** have been classified as “bicyclists.” The following provides a detailed profile of the general bicyclist audience segment across several key areas of the study.

Bicyclist profile
Sixteen percent (16%) of respondents were daily, weekly or monthly bicyclists. Nearly three-quarters of all respondents (72%) said they never use a bicycle for transportation. Bicyclists show a higher concentration among young adults, 16-44. They were also twice as likely to be male than female (62% male; 38% female). Bicyclists tend live in households with higher annual incomes; a greater portion (37%) reported $100,000 compared to the general population (23%). When looking at county-by-county results, there is a higher concentration of bicyclists living in Multnomah County (21% (as a percentage of county respondents)) compared to Washington (9%) and Clackamas (9%) counties.

Travel and commutes by bike:

- Only 3% of bicyclists report riding daily as a form of transportation. Most daily/weekly/monthly bicyclists ride for leisure activities (67%) or to shop or run errands (59%), but nearly one-third (32%) report commuting to work on a bicycle.

- In general, 92% of bicyclists were either “very” or “somewhat” satisfied with their overall cycling experiences. Those who were not satisfied were concerned about safety – in particular, drivers’ awareness of bicyclists (28% of bicyclists were dissatisfied with that attribute).
- 8% of commuters said they were aware their employer offers a biking or walking incentive (the survey combined these so bike incentives cannot be broken out separately).

Motivations and messaging:

- More than two-thirds (69%) of all respondents said they personally had access to a bicycle. Bike access was equally likely between males and females. Bike access was prevalent across all age ranges except for those 65 years and over (42%). Bike access was similar across the three counties (66% Clackamas, 70% Multnomah, 70% Washington).
- Bicyclists were more than twice as likely to say they were motivated to reduce their driving to be healthier (55% compared to 24% of the general population).
- Bicyclists were slightly less likely to be motivated to save money (37%) than the general population (41%).
- Feedback from 2011 focus groups also indicated that bicyclists were motivated to ride because:
    - It’s fun and enjoyable to be outdoors.
    - They like the sense of community fostered by cyclists.
    - They get more familiar with the city and discover more businesses and restaurants.
    - It’s better for the environment.
    - It helps them avoid the hassles of driving (especially cost and maintenance).
    - Cycling is sometimes faster than other travel modes, especially in downtown Portland.
- In regard to what might grow the bicycling audience (or prevent more of the population from riding a bike more frequently), 2011 focus group participants expressed concerns regarding safety, lack of information, and confusion about routes. In particular, they mentioned:
    - The need for wider bike lanes
    - Concerns about riding with children and inattention of other drivers
    - Being unfamiliar with safer, faster and more direct routes
    - Geographic concerns like hills and highway barriers
    - Lack of information about travel times by bike to destinations, which may vary for experienced riders compared to new riders
    - Low awareness of trip planning tools

How bicyclists get information:

- 69% said they used digital sources (websites or apps) to get information about taking bike trips.
- Of those aware of TriMet’s Map Trip Planner, 17% said they used it to plan a trip that combined transit and bicycling; 12% planned a bicycle-only trip.

Awareness of RTO bike programs and related services:

Bike There! Map
Nineteen percent (19%) of all respondents heard or saw something about the Bike There! map. The most common response to where they most recently encountered the map was through word-of-mouth (26%) and second was at a bike shop (18%). One-fifth (21%) said they bicycle to more places as a result of using the map. Only 10% were not satisfied with using the bike map.

BTA Bike Commute Challenge
Nearly one-third 30% of the general population were aware of the BTA Bike Commute Challenge. Ten percent (10%) of those were motivated by the Challenge to commute year-round by bike. Of those who were aware of the challenge, 81% reported they had access to a bike. Multnomah County registered the highest concentration of awareness at 38% of residents (as compared to 23% of Clackamas County and 24% of Washington County residents).

Safe Routes to School
Twenty-two percent (22%) of all respondents were aware of Safe Routes to School. Slightly higher margins of weekly and monthly bicyclists were aware of Safe Routes to School (30%). Of those who said they were aware, 78% said they had access to a bicycle which is higher than for the general population (69%). Women were more likely aware (26%) than men (17%). Awareness was highest in Multnomah County (28%), followed by Clackamas County (19%) and Washington County (15%).

WALKERS

Respondents who reported walking for transportation ***daily, weekly*** *or* ***monthly*** have been classified as "walkers." The following provides a detailed profile of the general walker audience segment across several key areas of the study.

Walker profile
Walking as a mode of transportation was the second most common response with nearly half (45%) of the population walking on a daily, weekly or monthly basis. One-third (34%) of respondents said they never walk for transportation. Of those who said "never," 71% live in below-average Context Tool score locations; and, of those who are employed and said "never" work in below-average Context Tool score locations. Nearly one-third of daily drivers (32%) were walkers, which includes 6% of daily drivers who also walk daily as a form of transportation. Walkers were much more likely to live in Multnomah County (61%) than Washington (26%) or Clackamas (13%) counties. Walkers were more likely to have lower annual household incomes: 27% ranged from $25,000 to 49,000, compared to 22% of the general population.

Travel and commutes by walking

- As with the other non-auto travel options, walkers generally walk for leisure activities (70%) or to shop or run other errands (65%). Another 15% walk to work (highest among adults 25-44), while 7% walk to school.
- 91% were very or somewhat satisfied with their overall walking experiences. Walkers were dissatisfied with the lack of awareness of walkers by cyclists (20%) and the lack of awareness by drivers (20%).
- 8% of commuters said they were aware their employer offers a biking or walking incentive (the survey combined these so walk incentives cannot be broken out separately).

Motivations and messaging:

- Walkers were more equally motivated to reduce their driving to save money (37%) and to be healthier (32%) than the general population (41% and 24% respectively). The message to grow this audience to use walking more frequently for transportation will work best when messages combine the two benefits: health and savings.
- 2011 focus group participants expressed concerns including: inattention of drivers, low awareness of travel times, low awareness of trip planning tools and needing safer and faster routes.
- Focus group feedback regarding residents' motivations to walk largely mirrored the responses of bicyclists. Walkers prefer not to drive because walking allows them to be outdoors and help the environment. It also allows them to become familiar with the city, and they like the sense of community that fostered among walkers.

How walkers get information

- 37% said they used digital sources (websites or apps) to get information about taking walk trips. One-quarter (26%) get information from family, friends or co-workers. Half (50%) replied "none of the above" to the short list of information sources.
- Of those aware of TriMet's Map Trip Planner, 31% said they used it to plan a walk-only trip.

Awareness of RTO programs and related service by walkers:

Walk There! Guidebook and App

One-fifth (20%) of all respondents had heard of the Walk There! guidebook or Walk There! app. Most people who have heard about the Walk There! guidebook or Walk There! app were more represented by middle-age adults 45-64 years old (30% aware), white (22% white; 10% non-white), female (25% female; 15% male) and live in Multnomah County (26% Multnomah; 20% Clackamas; 13% Washington). The majority of weekly and monthly walkers (45%) have heard about the tool by word of mouth (friends, family, co-workers). Twice as many weekly and monthly walkers have heard about the guidebook (57% than the app 30%, though awareness of both is strong (24%). Weekly and monthly walkers who used the guidebook indicated they walked more places or discovered new routes as a result. Overall, most weekly and monthly walkers (77%) were "very" or "somewhat" satisfied with at least the guidebook.

Safe Routes to School
Twenty-seven percent (27%) of those who have seen or heard something about the Safe Routes to School program were weekly or monthly walkers. These respondents were more likely to be women. Twenty-six percent (26%) of those whom the program helped encourage to walk or bike more for school trips with their family were weekly or monthly walkers.

TRANSIT RIDERS

Respondents who reported using public transportation ***daily, weekly*** *or* ***monthly*** have been classified as "transit riders." The following provides a detailed profile of the general transit rider audience segment across several key areas of the study.

Transit rider profile
Nearly one-third (32%) of respondents were daily, weekly or monthly users of public transportation, while just over one-third (37%) said they never use it. Those identifying as regular transit riders were more commonly younger residents (ages 16-44), in Multnomah County and with lower household incomes. They were also more likely than drivers to show openness to biking, walking and carpooling in addition to riding public transportation. Over a third (35%) of all males reported being transit riders as compared to 28% of females. Concerns regarding safety and weather were explored later in this report.

Travel and commutes by transit:
Most transit riders (25%) said they use public transportation weekly or monthly, but 7% rely on it daily as a form of transportation. Forty-eight percent (48%) primarily ride the bus, 37% primarily ride the MAX and 5% primarily ride the Portland Streetcar (the question did not ask about include bus and MAX, bus and streetcar, etc, as options).

The majority (87%) were satisfied with their public transit experience, but the lowest satisfaction score was for frequency of service (81% very or somewhat satisfied). Transit riders tended to use the service more for leisure activities (58%), and shopping and running errands (52%), than for going to work (24%) or school (15%). This pattern is similar to walkers and bicyclists. One-fifth (21%) of respondents said their employer offered a transit incentive; the most wide-spread incentive according to RTO survey results.

Motivations and messaging:

- Transit riders were motivated to reduce their driving in similar to the general population: most said to save money (44%) followed by to be healthier (27%). According to feedback from 2011 focus groups, residents also use public transportation because it makes them feel better than driving does. Using public transportation allows them to relax, discover the city, and slow down their pace of life. Participants said it helps bring balance to their lives and lets them avoid the hassles of driving, like searching for parking and spending time in traffic.

- 2011 focus group feedback revealed several barriers to using public transportation. Concerns regarding personal safety and the behavior and appearance of other users were on the focus group's list. The focus group also mentioned concerns related to weather, lack of frequent service routes, confusing system maps, the need for Sunday and late evening service, short transfer times and inconsistencies with the TriMet Trip Planner.

How transit riders get information:

- Most transit riders get information to help them take transit trips from digital sources. Websites were most popular (58%) for this purpose, followed by smartphone apps (32%).
- 86% of weekly and monthly transit riders have heard about the TriMet Trip Planner, compared with 66% of general survey respondents.
- 72% of weekly and monthly transit riders used the tool to plan a transit-only trip, compared with 63% of general survey respondents.
- Because 64% of weekly or monthly transit riders claim to have access to a bicycle, there may be an opportunity to increase their use of the TriMet Map Trip Planner for planning combined transit and bicycle trips to grow the number and efficiency of their trips.

Awareness of RTO programs and related service by transit riders:

TriMet Trip Planner

As previously mentioned, weekly and monthly transit riders were more likely than the general population to have heard about the TriMet Trip Planner and to have used it to plan transit-only trips. Weekly and monthly transit riders were also more likely than general survey respondents to be aware of the new Map Trip Planner (26% of weekly/monthly riders were aware; 20% general population were aware).

ANALYSIS BY FREQUENCY

One of the specific objectives of the 2012 survey was to better identify audiences by their frequency of using travel options to inform marketing efforts. Table 5 below shows categories: Frequent (Daily), Occasional (Weekly or Monthly) and Infrequent (Rarely or Never).

Table 5: Respondents' frequency using travel options categorized by Frequent, Occasional or, Infrequent

DAILY	WEEKLY	MONTHLY	RARELY	NEVER
FREQUENT	OCCASIONAL		INFREQUENT	

Tables 6 and 7 below provide a side-by-side comparison of several key statistics, discussed in the following text.

FREQUENT USER AUDIENCE

The "frequent user" audience included daily users of each travel option. At times, RTO intentionally celebrates and rewards the bicyclists, walkers and transit riders in this audience. In general, RTO activities are likely to support this audience even if they are targeted at different demographics.

Frequent user audiences were more likely to be younger, in lower income households (except among frequent bicyclists), and motivated to reduce car trips to save money (except frequent bicyclists who are also motivated to be healthier

OCCASIONAL USER AUDIENCE

Occasional travel options users were people who said they bike, walk or ride transit weekly or monthly (and likely drive for much of their travel). For this group, respondents have some existing awareness of, and experience with travel options. RTO campaigns designed to reach this group theoretically can appeal to their experience as an advantage to encourage more frequent use of travel options.

The occasional user audience tended to be more motivated to reduce car trips "to be healthier" than the general population. Occasional bicyclists tended to be male but walkers and transit riders reflect the general population gender balance. Occasional bicyclist had higher household incomes but walkers and transit riders reflected household earnings of the general population. Occasional public transit riders tended to be younger but occasional walkers had similar ages to the general population. Occasional bicyclists had a balance of ages up to 64 and then fewer represented in the 65+ age category.

INFREQUENT USER AUDIENCE

The infrequent user audience of biking, walking and taking transit tended to be more female than the general population.

The infrequent user audience is important to consider since limited funds are available for marketing efforts. The infrequent user audience requires a marketing effort to "try something new" while the occasional user audience has already tried it. New high-capacity transit service is a good example for when RTO partners may consider marketing to the infrequent user audience (e.g., Portland-Milwaukie Orange Line MAX in 2015).

Tables 6 and 7 contrast audience profiles by travel option with the overall regional population – a means to highlight several differences that RTO partners may use when developing marketing and outreach strategies.

Table 6: General Population Profile for Reference

	General Population	
All	**100% (N=581)**	
	GENDER	
	48%	Male
	52%	Female
	AGE	
	24%	16-24
	32%	25-44
	27%	45-64
	17%	65+
	COUNTY	
	21%	Clackamas
	46%	Multnomah
	33%	Washington
	HOUSEHOLD INCOME (annual; excludes don't know and refused)	
	15%	< $25,000
	22%	$25,000 - $49,000
	22%	$50,000 - $74,000
	18%	$75,000 - $100,000
	23%	> $100,000
	MOTIVATION TO REDUCE CAR TRIPS	
	41%	Save money
	24%	Be healthier

Table 7: Respondents' frequency using travel options

	FREQUENT	OCCASIONAL	INFREQUENT
THOSE WHO BICYCLE	**3% daily (N=16)** tend to be: Male (13 of 16 respondents), Younger age 16-44 (all respondents), Living in Mult. Co. (11 of 16 respondents), Earning household income below $74,000 or above $100,000 annually (all respondents), Motivated equally to reduce car trips to be healthier and save money	**12% weekly and monthly (N=71)** tend to be: Male (63%) Balanced across ages between 16-64 (93%) Living in Mult. Co. (63%), Wash. Co. (23%), Clack. (14%) Earning household incomes $100,000 annually (33%) Motivated to reduce car trips to be healthier (56%) more than twice as likely than the general pop.	**85% rarely and never (N=493)** tend to be: Female (55%) Balanced across age spectrum Living in Mult. Co. (43%), Wash. Co. (35%), Clack. (22%) Earning household incomes similar to general pop. Motivated to reduce car trips same as general pop. to save money (42%) followed by being healthier (19%)
THOSE WHO WALK	**13% daily (N=75)** tend to be: Male (52%) Ages 16-44 (77%) Living in Mult. Co. (61%), Wash. Co. (31%), Clack. (8%) Earning household incomes less than $25,000 annually (25%) Motivated to reduce car trips same as general pop. to save money (43%) followed by being healthier (23%)	**32% weekly and monthly (N=187)** tend to be: Balanced male (51%)/female (49%) Balanced across the ages Living in Mult. Co. (60%), Wash. Co. (24%), Clack. (16%) Earning household incomes $25,000-$49,000 annually (29%) Motivated to reduce car trips to be healthier (36%) more than general pop., even with saving money (35%)	**55% rarely and never (N=320)** tend to be: Female (55%) Older age 45-64 (32%) (least likely 16-24 (18%)) Living in Wash. Co. (39%), Mult. Co. (34%), Clack. Co. (27%) Earning household incomes similar to general pop. Motivated to reduce car trips same as general pop. to save money (45%) followed by being healthier (18%)
THOSE WHO TAKE PUBLIC TRANSIT	**7% daily (N=38)** tend to be: Female (58%) Younger age 16-24 (54%) Living in Mult. Co. (67%), Clack. (21%), Wash. Co. (13%) Earning household incomes less than $25,000 annually (34%) Motivated to reduce car trips to save money (61%)	**24% weekly and monthly (N=140)** tend to be: Balanced male (56%)/female (44%) Younger ages 16-44 (67%) Living in Mult. Co. (54%), Wash. Co. (29%), Clack. (16%) Earning household incomes similar to general pop. Motivated to reduce car trips to save money (39%) and to be healthier (31%)	**69% rarely and never (N=400)** tend to be: Female (54%) Older age 45-64 (31%) (least likely 16-24 (17%)) Living in Mult. Co. (42%), Wash. Co. (36%), Clack. (22%) Earning household incomes similar to general pop. Motivated to reduce car trips same as general pop. to save money (42%) followed by being healthier (23%)
THOSE WHO DRIVE	**54% daily (N=311)** tend to be: Equally male/female Ages 25-44 (38%) Living in Mult. Co. (41%), Wash. Co. (36%), Clack. (24%) Earning higher household incomes compared to general pop. (2 or 3 percentage points higher in income categories above $50,000 annually) Motivated to reduce car trips		**11% rarely and never (N=66)** tend to be: Equally male/female Younger ages 16-24 (43%) Living in Mult. Co. (63%), Wash. Co. (21%), Clack. Co. (16%) Earning household incomes less than $25,000 annually (36%) Less motivated by both

same as general pop. to save money (44%) followed by being healthier (22%)		messages reduce car trips than the general pop.: to save money (35%) and to be healthier (18%)

CONCLUSIONS AND RECOMMENDATIONS

Findings from this 2012 RTO Travel and Awareness survey met its objectives, taking a pulse of the general Metro-area population to measure current awareness of RTO, travel and commuting habits, motivations to drive less and where people turn to for traveler information. Results provide ongoing benchmarking data and insights to inform and guide marketing strategies.

Program awareness showed increases from 2010, with the highest awareness tied to the longest-running and most funded regional or state initiatives.

To encourage travel options without investing in additional infrastructure, assessments of this data can show how to tailor marketing efforts to target audiences based on travel habits by specific demographics. In addition, insights were gained from questions around recurring themes such saving time and money, and health benefits that may inform messaging for future marketing initiatives.

Marketing strategy recommendations will be included in a forthcoming document from EnviroMedia.

FUTURE EVALUATION AND RESEARCH

It's recommended that RTO continue to field the Travel and Awareness survey every two years as part of an ongoing effort to track changes in public motivations and their frequency of using travel options. The survey also evaluates RTO partners' progress to increase awareness over time and informs marketing strategy.

RTO partners should use the same methodology and sample size to ensure comparability between surveys. The total sample size in 2012 was nearly doubled from 2010, providing a smaller margin of error. The larger margin of error from 2010 results made comparisons between the studies less certain than is hoped for future surveys. RTO should consider eliminating questions with anticipated responses of less than 50 people, as analyzing those results becomes statistically insignificant.

While much of the 2012 data was analyzed in this report, the data can be further analyzed. RTO can use Context Tool scores and other GIS tools to calculate distance from home to work or school, and be able to evaluate responses by distance intervals (e.g., < 1mile, 1-3 miles, 4-6miles, 7-10 miles or > 10 miles). The analysis will help further refine characteristics of occasional use audiences.

Specific recommendations for the 2014 RTO Travel and Awareness survey are:

- Measure bike ownership in addition to "access."
- Ask about recreational bike use (e.g., when, why, how often, distance, destinations).

- In order to facilitate the analysis of results for such a large questionnaire, RTO should explore (with contracted services) a digital platform to allow cross-analysis of all questions. Printed cross-tables are labor intensive and have limited options for cross-analyzing results.

RTO partners should consider other research tools including an update of the 2004 barriers and benefits study.[5] Refreshed information from this qualitative and quantitative study will help RTO partners navigate real and perceived barriers and benefits as they develop future marketing campaigns.

[5] 2004 Travel Behavior Barriers and Benefits Research http://library.oregonmetro.gov/files/travel_barriers.pdf

APPENDICES

Appendix A – Questionnaire

Metro RTO Travel and Awareness Survey
October 16-23, 2012; 13.5 minutes
N=581 residents ages 16+
(Proportionate sample for Clackamas, Multnomah, Washington)
Margin of error +/-4.1% (N=581)
DHM Research

INTRODUCTION
Hello, this is _______ calling on behalf of (Metro, your regional government).

I have a few questions about transportation in your community. Your participation in this study will help our region provide services to reduce traffic congestion and increase livability. Your comments will be kept anonymous and this should take about 10 minutes to complete. Some questions may seem to repeat but they are all important and we appreciate your patience. As a token of our appreciation, we will enter you in a drawing for a $100 gift card. We'll get you through the questionnaire as quickly as possible.

If necessary: This study is funded by Metro, the regional government agency for Portland, Oregon. If you have any concerns, please call Caleb Winter at Metro; 503-797-1758.

SECTION 1: GENERAL TRAVEL

1. What best describes your working status?

Response Category
Employed full or part time (Employed)
Student full or part time (Student)
Homemaker (Unemployed)
Unemployed, retired (Unemployed)
Other (Unemployed)
Refused

(Randomize Q2-Q5. Answers to Q2-Q5 determine skip logic noted under Q5)

2. Over the course of this year, did you use a car daily, a few times a week but not every day, several times a month, rarely, or never?

3. Over the course of this year, did you use a bicycle as a form of transportation daily, few times a week but not every day, several times a month, rarely, or never? Keep in mind this is for transportation trips and not for exercise.

4. Over the course of this year, did you walk as a form of transportation daily, a few times a week but not every day, several times a month, rarely, or never? Keep in mind this is for transportation trips and not for exercise.

5. Over the course of this year, did you ride public transportation daily, a few times a week but not every day, several times a month, rarely, or never?

Respondents may be asked none, one or all series.

- If Car (Q2) Daily, Weekly, or Monthly=driver
- If Bike (Q3) Daily, Weekly, or Monthly=bicyclist
- If Walk (Q4) Daily, Weekly, or Monthly=walker
- If Public transportation (Q5) Daily, Weekly, or Monthly=public transit user

SECTION 2: DRIVERS

Ask if defined as "driver" Q2= daily, weekly or monthly in Section 1

6. (If Q1= student or employed AND Q2= daily, weekly or monthly) Which of the following best describes how you commute to (work/school) most of the time? (read list; accept one response)

Response Category
Commute by car alone (Drive alone)
Commute by car with someone in household (Drive alone)
Commute by car in carpool – either an organized carpool or with people outside your household (Car/vanpool)
Commute in a vanpool (Car/vanpool)
Commute using a transit mode other than car
Don't know

7. (If Q1= student or employed AND Q2= daily, weekly or monthly) If you did not have access to a car, and needed to get to (work/school), would you most likely: (Read list; randomize; accept one response)

Response Category
Ride a bike
Walk
Use public transit
Carpool
Take a taxi
Carsharing service, for example Zipcar, or Car2Go
Don't know

8. (If Q1= student or employed AND Q2= daily, weekly or monthly In general, would you say that your commute is easier, more difficult, or the same now as it was one year ago?

Response Category
Easier
More difficult

Same
Don’t know

9. (If Q1 = student or employed but don’t carpool or vanpool to Q6 AND Q2 = daily, weekly or monthly) 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.

Response Category
Yes
No
Don’t know

10. (If student or employed but don’t carpool or vanpool to Q6 AND Q2= daily, weekly or monthly) If you could receive a $50 monthly voucher, how likely would you be to start commuting by carpool in the next 6 months: very likely, somewhat likely, not too likely, not at all likely.

Response Category
Very likely
Somewhat likely
Not too likely
Not at all likely
Don’t know

11. (If Q1 = student or employed AND car Daily, Weekly, Monthly in Q2) Do you get updated travel information for driving from: (Randomize; select all that apply)

Response Category
GPS Navigation device
Websites
Smart Phone apps
Calling or texting from a phone
News/radio/TV broadcasts
Family, friends, or coworkers
None of the above
Don’t know

SECTION 3: BICYCLISTS

Ask if defined as “bicyclist” [Q3=daily, weekly or monthly] in Section 1

12. Do you bicycle at all for? (Randomize; select all that apply)

Response Category
(if employed Q1) To get to Work
(if student Q1) To get to School
For Shopping or errands
For leisure activities, like going to a restaurant or movie

None of the above
Don't know

In general, when it comes to bicycling in your area are you very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied with: (Randomize 14-19, ask 13 overall experience first)

Response Category (N=87)
13. Your overall bicycling experience
14. The availability of bike routes
15. The quality of bike routes
16. The connectivity of the network of bike routes
17. The availability of bicycle parking
18. The ease of combining bike and transit trips
19. The awareness for bicyclists by car drivers

20. Do you get information to help you plan trips on your bicycle from: (Randomize; select all that apply)

Response Category
Printed maps
Websites
Smart Phone apps
Family, friends, or coworkers
None of the above
Don't know

SECTION 4: WALKERS

Ask if defined as "walker" Q4=daily, weekly or monthly in Section 1

21. Do you walk : (Randomize; select all that apply)

Response Category
(if employed Q1) To get to Work
(if student Q1) To get to School
For Shopping or errands
For leisure activities, like going to a restaurant or movie
None of the above
Don't know

In general, when it comes to walking in your neighborhood are you very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied with: (Randomize 23-27 ask 22 overall experience first)

Response Category (N=262)
22. Your overall walking experience
23. The availability of sidewalks and paths
24. Awareness ~~of~~ for pedestrians by car drivers
25. Awareness ~~of~~ for pedestrians by bicyclists
26. Ease of crossing busy streets

27. Do you get information to help you take walking trips from: (Randomize; select all that apply)

Response Category
Printed maps or guidebooks
Websites
Family, friends, co-workers
Smart phone apps
None of the above
Don't know

SECTION 5: PUBLIC TRANSPORTATION

Ask if defined as "public transit user" Q5= daily, weekly or monthly in Section 1

28. Which of the following transit services do you use the most? (Randomize**;** read list; accept one response; if necessary, "which one do you use to travel the longest distance?")

Response Category
Bus
MAX
Streetcar
WES commuter rail
LIFT **added after pilot test*
Other (specify)
Don't know

29. Do you use public transit? (Randomize; select all that apply)

Response Category
(if employed) To get to Work
(if student) To get to School
For Shopping or errands
For leisure activities, like going to a restaurant or movie
None of the above
Don't know

30. In general, are you very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied with transit in the region?

Are you very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied with transit: (Randomize)

Response Category (N=179)
31. Connections between bus, MAX, Streetcar and WES
32. Frequency of vehicles
33. Reliability for on-time service
34. Personal safety on vehicles
35. Park-and-ride facilities

36. Do you get information to help you take transit trips from: (Randomize; select all that apply)

Response Category
Printed materials
Websites
Smart Phone apps
Calling or texting from a phone
Family, friends, co-workers
None of the above
Don't know

SECTION 6: AWARENESS OF RTO PROGRAMS (Ask all)

I will now describe a variety of transportation programs in the Portland Region. Please let me know if you have seen or heard about each program. (Yes, No, Don't know; Randomize 37-46)

Response Category (N=581)
37. The TriMet trip planner is an online tool that can be used to plan public transportation trips throughout the Portland region. Have you seen or heard anything about the trip planner?
38. City of Portland SmartTrips delivers information such as bike maps, walking maps and transit guides to residents. Have you seen

or heard anything about Portland SmartTrips?
39. The Bicycle Transportation Alliance bike commute challenge is a competition among workplaces where employees log their bike trips each September. Have you seen or heard anything about the Bike Commute Challenge?
40. The Bike There map is a waterproof, regional bicycling map created by Metro and sold in local bike and outdoor stores. Have you seen or heard anything about Bike There map?
41. The Walk There Guidebook to 50 treks around the region was created by Metro and available in local bookstores. A companion Smart Phone App is also available online. Have you seen or heard anything about the Walk There Guidebook or Walk There App?
42. Drive Less Save More is a campaign encouraging residents to make fewer single person car trips. Have you seen or heard anything about Drive Less Save More?
43. Drive Less Connect is a carpool matching and trip logging website. Have you seen or heard anything about Drive Less Connect?
44. Sunday Parkways or Sunday Streets are free events that open up city streets to bicyclists and walkers. Have you seen or heard anything about Sunday Parkways or Sunday Streets?
45. Carsharing services, such as Zip Car and Car2Go offer convenient, by-the-hour car rentals. Have you seen or heard anything about carsharing services?
46. Safe Routes to School creates safer, convenient and fun opportunities for children to bicycle and walk to and from school. Have you seen or heard anything about Safe Routes to School?

The following questions ask for the source of the respondent's awareness (Level 1), participation with the strategy or program (Level 2) and/or satisfaction (Level 3). To save time, and because other data is available, not all 3 are asked of all RTO programs and strategies included in the survey.

TriMet Map Trip Planner: Ask if aware (Q37 = Yes)

47. [ASK if Q37 = Yes] Did you plan a transit-only trip on the TriMet Trip Planner? (Yes, No, Don't know) **text change after pilot test*

48. [ASK if Q37 = Yes] In August, TriMet's website added support for planning and mapping combined transit and bicycle trips, as well as bike-only and walk-only trips. Have you seen or heard anything about this new map trip planner?

Response Category
Yes
No → SKIP TO Q54
Don't know → SKIP TO Q54

49. *(Level 1* [ASK if Q37= Yes]*)* Where did you most recently see or hear about the TriMet Map Trip Planner? (open; multiples accepted)

Response Category
TriMet website
Internet-General
Word of mouth-friends, family, or co-workers
Television news
Smartphone
Personal knowledge
Other
Don't know

50. *(Level 2*[ASK if Q37 = Yes]*)* Did you plan a trip that combined transit and bicycling?

Response Category
Yes
No
Did not use
Don't know

51. *(Level 2* [ASK if Q37 = Yes]*)* Did you plan bicycle-only trip?

Response Category
Yes
No
Did not use
Don't know

52. *(Level 2*[ASK if Q37= Yes]*)* Did you plan walk-only trip?

Response Category
Yes
No
Did not use
Don't know

53. *(Level 3,* [ASK if Q50 OR Q51 OR Q52 = yes]*)* Overall, how satisfied were you with using the Map Trip Planner? Were you very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied?

BTA Bike Commute Challenge: Ask if aware (ASK IF Q39 = Yes)

54. *(Level 2* [ASK IF Q39 = Yes]*)* Did the Bike Commute Challenge motivate you to commute year-round by bike?

Response Category
Yes
No
Did not participate

Don't know

Bike There! Map: Ask if aware (ASK if Q40 = Yes)

55. (Level 1 ASK if Q40 = 1) Where did you most recently see or hear about the Bike There! map? (Open)

Response Category
Word of mouth friends/family/coworkers
Bike store/shop
Internet/website
TV/news
Place of employment
Newspapers
Metro/bus
Sunday Parkway
Mail
Boarders books/book store
All other responses
Nothing/none
Don't know

56. (Level 2 ASK if Q40 = 1) Did you bicycle more places as a result of using the map?

Response Category
Yes
No
Did not use
Don't know

57. (Level 3 ASK if Q56 = Yes or No) How satisfied were you with using the Bike There! Map? Were you very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied?

Walk There! Guidebook and Walk There! App: Ask if aware (ASK if Q41= Yes)

58. (ASK if Q41=Yes) Before today, were you aware of the Walk There Guidebook, Walk There App or both?

Response Category
Guidebook
App
Both
Don't know

59. (Level 1 if Q58 =aware of guidebook or both) Where did you most recently see or hear about the Walk There! guidebook? (Open)

Response Category

Word of mouth friends/family/coworkers
Bookstore
Powell's Book Store
Have to book
Online
Library
All other responses
Don't know

60. (Level 2 if aware of ASK if Q58 = guidebook or both) Did you walk to more places or discover new routes as a result of using the guidebook?

Response Category
Yes
No
Did not use
Don't know

61. (Level 3 if Q58 = aware of guidebook or both AND Q60 = Yes or No) How satisfied were you with using the Walk There Guidebook? Were you very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied?

62. (Level 1 if Q58 = aware of App or both) Where did you most recently see or hear about the Walk There App? (Open)

63. (Level 2 if Q58 =aware of App or both) Did you walk to more places or discover new routes as a result of using the App?

Response Category
Yes
No
Did not use
Don't know

64. (Level 3 if Q58 = aware of App or both, if yes AND Q63 = Yes or No) How satisfied were you with using the Walk There App? Were you very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied?

Drive Less, Save More: Ask if Q42 = Yes)

65. (Level 1 Ask if Q42 = Yes) Where did you most recently see or hear about Drive Less, Save More? (Do not read list; expand code frame if necessary)

Response Category
Television—general
Radio
Bus advertisements
Internet/online
Newspaper

Work place
Commercials
Billboards
News – general
At school
Friends/family
All other responses
Don't know

Drive Less Connect: Ask if Q43 = Yes)

66. *(Level 1* Ask if Q43 = Yes*)* Where did you most recently see or hear about Drive Less Connect? (open; multiples accepted)

67. *(Level 2* Ask if Q43 = Yes*)* As a result of using Drive Less Connect, did any of the following occur? (Randomize; select all that apply)

Response Category
You made fewer trips in your car
You started carpooling more often
None of the above
Did not use
Don't know

68. *(Level 3, if yes* Ask if [Q43 = Yes] AND [Q67 <>4]*)* How satisfied were you with Drive Less Connect? Were you very satisfied, somewhat satisfied, not too satisfied, or not at all satisfied?

Sunday Parkways: (no additional questions)

Carsharing Services: Ask if Q45=1)

69. (Level 2 Ask if Q45=1) (If aware of carsharing) If you use carsharing, please list the places you go. (If necessary, list examples: such as going to a store, park or movie)

Response Category
Do not use
Work
Stores
Doctors office
All other responses
Don't know

Safe Routes to School: Ask if Q46 = Yes)

70. (Level 2 Ask if Q46 = Yes) Did the Safe Routes to School program encourage your family to walk or bike more for school trips?

Response Category
Yes
No
Not applicable – no school children
Don't know

SECTION 7: COMMUTING HABITS

Ask if employed or go to school

71. (If Q1 =employed) In what city do you work? (Record)

Response Category
Portland
Beaverton
Hillsboro
Oregon City
Tigard
Tualatin
Clackamas`
All other
Nothing/None
Don't know

72. (If Q1 = employed) What is the closest intersection (cross streets) to your place of employment?

73. (If Q1 = employed and if driver Q2 = daily, weekly or monthly) Are you able to work from home some days? (Yes, No, Don't Know)

74. (If Q1 = employed /student) Does your (employer/school) offer financial incentives for any of the following commute options? (Randomize; select all that apply)

Response Category
Biking/Walking
Carpooling or vanpooling
Transit
None of the above
Don't know

75. (If Q1 = employed)If you are at work without a car, does your employer offer a free ride home in case of a personal emergency? (Yes, No, Don't know)

76. (If Q1 = student) What school do you attend? (Insert school dropdown list)

Response Category
Portland State University

Portland Community College-Sylvania
Mt. Hood Community College
Clackamas Community College
Portland Community College-Cascade
Don't attend school
All other responses
None/Nothing
Don't know

77. (If Q1=student/employed) Have you seen information about different transportation options posted anywhere at your (workplace/school)? (Yes, No, Don't know)

78. (If Q1= student or employed) Do you pay to park at (work/school)? (Yes, No, Don't know)

79. (If Q78 = Yes) How much do you pay per month to park? Just an estimate is fine. (Collect in Dollars)

80. (If Q78 = yes, pay to park) If you had to pay $25 more per month to park, would you: (Randomize; accept one)

Response Category
Keep driving and pay the extra cost
Switch to another mode such as bicycling or transit
Start carpooling or vanpooling
Walk
Other- please specify
None/Nothing
Don't know

81. (If Q78= no, don't pay to park) If you had to pay $25 per month to park would you: (Randomize; accept one)

Response Category
Keep driving and pay the extra cost
Switch to another mode such as bicycling or transit
Start carpooling or vanpooling
Walk
Look for other employment
Find alternative parking
All other responses
Not applicable
Don't know

SECTION 8: MESSAGES + MESSAGING

82. Let's say you're planning to reduce the amount you drive. Which one statement from the following choices best describes why you might do this (randomize; read list; accept one response):

Response Category
To save money on vehicle and parking expenses
To spend less time in traffic
To be healthier by using other transportation options like bicycling and walking
Because friends and family encouraged me to drive less
Don't know

83. (If Q82= "to save money") How much money do you think you could save each week by reducing the amount you drive? (Collect in dollars)

84. (If Q82 = "less time in traffic") How much time in traffic do you think you could avoid each week by reducing the amount you drive? (Collect in minutes)

85. (If Q82 = "to be healthier") In what ways do you think your health could be improved by using other transportation options like bicycling or walking? (open; multiples accepted)

86. (If Q82 = "friends/family encouraged me") Who is the person or group of people most likely to convince you to drive less?

87. (If Q82 = Don't know) What would convince you to reduce the amount you drive? (open; multiples accepted)

SECTION 9: DEMOGRAPHICS

These last few questions are to make sure we have a talked to a representative portion of the community. They are very important, and remember that all of your answers are confidential and not associated with your name in any way.

88. How long have you lived in the Portland metro area? (Record number of years)

89. When was your most recent move? (Record year)

90. (Ask all) Was transportation a factor in your decision to move? (Yes, No, Don't know)

91. (If Q90 = yes) In what ways? (open; record up to 3 responses)

92. How many people currently live in your household? (Record number)

93. (If more than one person IFQ92>1) How many people under age 18 live in your household? (Record number)

94. How many vehicles are kept at home for use by household members? (Record number)

95. Do you own more, the same or fewer vehicles, compared to last year? (More, Same, Fewer, Don't know/refused)

96. Do you personally have access to a bicycle? (Yes, No, Don't know/refused)

97. What best describes your home (read list):

Response Category
Mobile home
Single-family detached house
Duplex
An apartment building with 3 or more units
Condominium
Townhome
Other___
Don't know/Refused

98. Do you own or rent your home? (Own, Rent, Don't know/refused)

99. Which of the following categories includes your annual household income before taxes? (read list) **text change after pilot test*

Response Category
Below $25,000
Between $25,000 and $49,000
Between $50,000 and $74,000
Between-$75,000 to $100,000
More than $100,000
Don't know /Refused

100. (If Q99= below $25,000)Would you say your income is (read list) ** added after pilot test*

Response Category
Below $11,000
Between $11,000 and $15,000
Between $16,000 and $19,000
Between $20,000 to $24,000
Don't know /Refused

101. What is your age?

Response Category
16-17
18-24
25-34
35-44
45-54
55-64
65-74
75+
Don't know/Refused

102. What best represents your racial background?

Response Category
White
Black or African American
Asian
Native Hawaiian or other Pacific Islander
American Indian or Alaska Native
Hispanic
Multi-racial or bi-racial **added after pilot test*
Other
Refused

103. Are you of Hispanic, Latino, or Spanish origin? (Yes, No, Refused)

104. Do you speak a language other than English at home? (Yes, No, Refused) ** added after pilot test*

105. [IF Q104= Yes] What language do you speak at home (open) ** added after pilot test*

106. Gender (BY OBSERVATION)

107. What is your home zip code?

108. What is the closest intersection to where you live?

109. What county do you live in? (Clackamas, Multnomah, Washington)

110. What city do you live in (Dropdown list for interviewer based on County)

111. Are you very interested, somewhat interested, not too interested, or not at all interested in learning more about taking public transit, carpooling, biking, or walking in your neighborhood?

112. If there is one thing you could suggest to improve or facilitate your travel in the region today, what would that be? (Open)

113. May I please have your name so I can enter you into the drawing for the $100 gift card?

114. And have I reached you at <PHONE>?

Appendix B – Analysis by age

The following tables look systematically at age across frequent, occasional and infrequent users of travel options. These tables will help inform marketing strategies as they are discussed by RTO partners.

Frequent: plus signs (+) indicate age ranges that are more pre-disposed to travel options than the average population. Two plus signs (+ +) or two negative signs (- -) indicate the difference was greater or less (respectively) than the margin of error (+/- 4.1% at the 95% confidence interval)	Monthly/Rarely/Never Drivers (Q2)	Daily bikers (Q3)	Daily walkers (Q4)	Daily transit users (Q5)	Employees/Students: Commute by non-drive alone (N=335)	Aware of TriMet Trip Planner: planned a transit only trip (Q47, N=383)
Average for entire population (N=581 unless indicated otherwise)	**14%**	**3%**	**13%**	**7%**	**25%**	**63%**
16-24 year olds	+ +	+	+ +	+ +	+ +	+ +
25-44 year olds	-	+	+	+	-	+
45-64 year olds	-	-	- -	- -	- -	-
65+ year olds	- -	(no data)	- -	- -	- -	- -

Frequent continued	Bicyclists: Very/somewhat satisfied with overall bicycling experience (Q13, N=87)	Walkers: Very/somewhat satisfied with overall walking experience (Q22, N=262)	Transit riders: Very/somewhat satisfied with public transportation in the region (Q30, N=179)	Very interested in learning more about travel options (Q111)
Average for entire population (N=581 unless indicated otherwise)	**93%**	**90%**	**87%**	**7%**
16-24 year olds	+	+	+	-
25-44 year olds	-	- -	+ +	+
45-64 year olds	+	+	- -	=
65+ year olds	+ +	+ +	- -	- -

Occasional: plus signs (+) indicate age ranges that are more aligned with the occasional use audience. They have experience using travel options and may have potential to increase their frequency. Two plus signs (+ +) or two negative signs (- -) indicate the difference was greater or less (respectively) than the margin of error (+/- 4.1% at the 95% confidence interval)	Weekly/Monthly bicyclists (Q3)	Weekly/monthly walkers (Q4)	Weekly/monthly transit riders (Q5)	Satisfied (very + somewhat) with biking (Q13, N=87)	Satisfied (very + somewhat) with transit (Q30, N=179)
Average for entire population (N=581 unless indicated otherwise)	**12%**	**32%**	**24%**	**92%**	**87%**
16-24 year olds	+	+ +	+ +	++	+
25-44 year olds	+	-	-	-	++
45-64 year olds	+	- -	- -	-	- -
65+ year olds	- -	+ +	-	++	- -

Occasional continued	Commuters who drive: Commute by car alone (Q6, N=335)	Commuters who drive: "If you did not have a car, and needed to get to work/school, would you most likely… (Q7, N=335)	Commuters: consider carpooling? (Q9, N=325)	Commuters: very/somewhat likely to carpool for $50 (Q10, N=325	Commuters: Employer offers financial incentives for transit (Q74, N=369)	Commuters: Employer offers financial incentives for walk, bike or transit (multiple responses accepted Q74, N=369)
Average for entire population (N=581 unless indicated otherwise)	**69%**	**Transit**	**30%**	**32%**	**21%**	**38%**
16-24 year olds	- -	Transit	-	+ +	-	- -
25-44 year olds	+	Transit	+ +	+ +	+	+
45-64 year olds	+	Transit	-	- -	+	+ +
65+ year olds	+ +	"Don't know"	- -	- -	n/a	n/a

Occasional continued	Aware of Bike Commute Challenge (Q39)	Aware of Drive Less Save More (Q42)	Aware of Drive Less Connect (Q43)	Aware of Sunday Parkways (Q44)	Aware of carsharing (Q45)	Aware of TriMet Trip Planner: "No" to planning a transit-only trip (Q47 N=383)
Average for entire population (N=581 unless indicated otherwise)	**30%**	**48%**	**17%**	**40%**	**71%**	**36%**
16-24 year olds	- -	-	+	- -	-	- -
25-44 year olds	+ +	+	- -	+	+ +	-
45-64 year olds	+	++	+ +	+ +	+ +	+
65+ year olds	- -	- -	-	-	- -	+ +

Occasional continued	Best reason to reduce car trips: Save more (Q82)	Best reason to reduce car trips: Be healthier (Q82)	Have access to a bicycle (Q96)	Smartphones used to find info for one or more modes (Q11, Q20, Q27 Q36)	Home location has good access to neighborhood destinations and travel options* (N=395)	Work location has good access to nearby destinations and travel options* N=246)	Renters (Q98)	Somewhat interested/not too interested in learning about travel options (Q111)
Average for entire population (N=581 unless indicated otherwise)	**41%**	**24%**	**69%**	**23%**	**42%**	**44%**	**19%**	**36%**
16-24 year olds	++	- -	++	++	++	++	-	++
25-44 year olds	=	+	++	++	+	+	++	++
45-64 year olds	- -	++	+	- -	- -	- -	- -	- -
65+ year olds	- -	- -	- -	- -	-	n/a	-	- -

**Metro Context Tool Composite Score for home location is better than median of all respondents. Source: Metro DRC and RTO analysis*

Infrequent: the more plus signs (+), the more likely the age group will require significant infrastrucutre changes and/or high RTO investment before considering travel options.	Daily drivers (Q2)	Never take transit (Q5)	Never walk (Q4)	"not at all likely" for carpool voucher (Q10, N=325)	Pay to park $25 (from $0) said they would keep driving (Q81, N=316)	2 or more children under 18 yrs in the HH (Q93)	Not aware of carsharing (Q45)	Not aware of DLSM (Q42)
Average for entire population (N=581 unless indicated otherwise)	**54%**	**37%**	**34%**	**44%**	**39%**	**26%**	**28%**	**51%**
16-24 year olds	- -	- -	- -	- -	- -	- -	+	+ +
25-44 year olds	+ +	-	-	-	+ +	+ +	- -	-
45-64 year olds	-	+	+ +	+ +	-	- -	- -	- -
65+ year olds	- -	+ +	+ +	- -	n/a	n/a	+ +	+ +

Infrequent continued	No financial incentives at work (Q74, N=369)	Don't know why they would reduce amount of driving (Q82)	3 or more vehicles in the HH (Q94)	Single-family detached (Q97)	higher income (100K plus) (Q99)	Owns a house (Q98)	No access to bicycle (Q96)	Not at all interested in learning about travel options (Q111)
Average for entire population (N=581 unless indicated otherwise)	**67%**	**18%**	**33%**	**81%**	**18%**	**77%**	**28%**	**51%**
16-24 year olds	-	- -	- -	+	- -	- -	- -	- -
25-44 year olds	-	-	- -	-	+	+	+	- -
45-64 year olds	+	-	+ +	+ +	+ +	+ +	+	+ +
65+ year olds	+ +	+ +	- -	- -	- -	-	+ +	+ +