Valley Metro
TDM Survey Results 2017

Spring 2017

for

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Executive Summary

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

The interviews were conducted between April 10 and May 16, 2017. Results are based on 402 telephone interviews conducted with 202 male and 200 female residents. Quotas were set to target approximately three quarters of employed residents, either full or part time (employed n=297), while remaining residents were either unemployed, house-spouses, students, or retired. The survey took approximately 15 minutes to complete. The total sample has a margin of error of ±5.0%.

Perceptions of Valley's Major Issues

- Nearly three in ten (29%) residents surveyed mentioned an *air quality/transportation*-related issue as being one of the most important issues facing the Valley. This represents a significant increase over the 21% measured last year and surpasses the 27% recorded in 2014.
- *Education* and *economy/unemployment* were the other top concerns among residents this year (mentioned by 24% and 17%, respectively). Immigration (14%) and healthcare (9%) rounded out the top most commonly mentioned issues facing the Valley in 2017.
- More than nine in ten residents (92%) believe the Valley's traffic congestion problem is *big* (47%) or *moderate* (45%). This is up significantly from 85% to 88% for the past four years.
    - While a vast majority of residents perceive traffic congestion in general to be a problem, far fewer report personally experiencing a problem with congestion. Similar to the last four years, just over one-half (51%) of residents said the Valley's traffic congestion was a big (18%) or moderate (33%) problem for them personally.
- Similar to last year, 85% of residents believe the Valley's air quality problem is *big* (34%) or *moderate* (51%).

Media Awareness

- Nearly three in four residents (73%) recall being notified of high pollution advisories in the past six months (compared to 78% in 2016). The top sources of HPA awareness were television (47%), freeway signs (30%) and the radio (15%).

- Valley Metro advertising recall in 2017 was similar to the past three years; 31% of residents recalled seeing or hearing advertising in the past year. However, awareness remains significantly lower than measured in 2013 (42%) and 2012 (47%).
- Recall of traffic reports reminding drivers to use alternative modes of transportation increased significantly to 43% in 2017, which represents a return to the level measured in 2014 but is still significantly lower than the 51% achieved in 2013.
- Awareness of a mail piece for ShareTheRide or to try different forms of transportation climbed back up to 12% after dip to 9% in 2016.
- For the third year, residents were asked if they have seen anything online encouraging them to change their commuting method ("change their game plan"); similar to prior findings 20% recalled this type of online advertising in 2017.
- Attitudes toward advertising that encourages people to use alternative modes of transportation remain stable and positive; three in four residents (75%) viewed this type of advertising as *very* or *somewhat favorable*.
- More than one-half of residents surveyed (52%) recalled seeing or hearing news stories about Valley Metro services, transit services, traffic congestion, or air quality in general**.** While this level of recall halts a downward trend in awareness of transit related new stories, it remains lower than achieved prior to 2015.
- More than half of those aware of the advertising /news stories said they or their family members had not done anything in response to the ads and news stories (56%).

Commuting Behavior

- In 2017, the percentage of employees/students using traditional alternative modes of transportation (i.e. bus, bike, light rail, walk, carpool, or vanpool) decreased slightly to a level consistent with most recent years after a slight increase last year (currently 15% some traditional AMU and 10% always traditional AMU).
- Fewer than one fifth (17%) of employed residents or students indicated they car/vanpool, which again is down from last year but at a level consistent with 2013 through 2015 measures.
- Total alternative mode usage including teleworking and compressed schedules stands at 44%, a decrease from 49% in 2016 but similar to the three prior years.
- As a percentage of trips excluding teleworking and compressed work schedules, approximately one fifth (19%) of total trips from surveyed employees/students were via an alternative mode of transportation. After a significant spike to 13% last year, the percentage of carpooling trips returned to 10% which is line with 2012 to 2015 findings**.**
- As a percentage of trips, alternative modes (including teleworking and compressed schedule) accounted for 30% of residents' trips – down from 35% last year.

- In 2017, the carpool frequency among carpoolers remained similar to recent years (3.0 days per week average), while the percentage of those who carpool is 16% overall (down from 2016 but similar to 2013-2015).

Comparison of Large and Small Organizations

- The majority (85%) of residents surveyed who work in large organizations indicated that at least one day a week they drive alone or use a motorcycle to commute to work, while approximately one fifth (20%) indicated using a traditional alternative mode of transportation. Fewer than one-half (45%) of employees from large organizations reported using any kind of alternative mode of transportation.
- For the second year in a row, the percentage of employees at larger organizations have surpassed those in smaller organizations to report using all alternative modes of transportation (45% vs. 42%).
- In 2017, alternative mode trips accounted for 30% of work trips among employees of large organizations and 31% for small organizations.

Perspectives on Alternative Mode Usage

- Employees and students who use alternative modes of transportation most often cite convenience (30%) as the primary motivation for using those modes of transportation (down from a 43% last year). In 2017, only 8% of alternative mode users cited saving gas/saving money as their main reason which is significantly lower than 2016 and 2014 and represents a ten-year low.
- When asked how they would go about finding partners for carpooling/vanpooling**,** employees most often indicated that they would contact friends/coworkers/word-of-mouth (35%, similar to 38% last year). After declining for five years, the proportion of employed residents who said they would seek a carpool partner through their place of employment increased significantly this year to 18% (from 11% last year).
- Similar to the prior two years, approximately one in four (27%) employees were aware Valley Metro offers an online matching system (remaining significantly higher than 20% in 2014). Of those who said "yes", none were able to correctly identify the name of the service (this was also the case in 2014 through 2016).
- As in 2016 and 2014, two thirds of employed residents indicated "yes," they would consider using Valley Metro's online matching system.
- Just over one-half (53%) of employed residents who are not currently carpooling/vanpooling indicated they would be somewhat or very likely to consider a customized matching system. This is up slightly compared to recent years and significantly higher than 42% in 2013.

Factors Affecting Commute Behavior

- Similar to recent years, just under two-thirds (62%) of non-alternative mode users suggested changes that may make it possible for them to use an alternative mode of transportation to commute to work or school in the future. An improved and expanded light rail system (13%) and bus system (13%) were again at the top of the list of suggested improvements.
- Two-thirds of (67%) employed residents surveyed indicate their company does not have a transportation coordinator, which is comparable to the 68% and 70% measured in the prior two years. Virtually all of those reporting a transportation coordinator work at a company with more than 50 employees.
- Four in ten (40%) employed residents indicated their company offers resources that provide information about ways to commute to work other than driving alone. This is in line with the measurements for the prior two years.
- When asked about the types of information they would want at their worksite, employees most frequently request carpool related information (14%). However, most indicate a lack of interest – by either stating “nothing/not interested” (41%) or simply saying “don’t know” (22%).
- Fewer than four in ten (37%) employed residents indicate their employers have encouraged them to commute to work by some means other than driving alone.
- Suggestions for how employers could encourage alternate mode transportation most commonly center on incentives or rewards (25%), but a full 39% indicated there was nothing their employer could do to motivate them to commute to work by a means other than driving alone.
- Compared to recent years, the top steps residents are willing to take to reduce drive along trips remain similar, with occasionally work from home receiving the highest proportion of “9” to “10 – very willing” ratings (50%), followed by working a compressed work week (42%).
- Residents were asked which types of information would be most likely to encourage them to consider alternative modes of transportation (multiples responses allowed). The most compelling messages in 2017 were saving money (64%), improving the environment (62%) and improving the community (62%).

Conclusions

1. After decreasing for two years, concern over air quality and transportation/congestion issues rebounded in 2017 with a significant increase making it the most frequently mentioned important issue facing the Valley. Specific mentions related to growth management, traffic congestion and transportation/transit all experienced increases and hit or exceeded five-year or longer highs. This replaces the economy, education and politics, which, not surprisingly, were of high concern in 2016 and the presidential election. Of note, a strong majority of residents rate the Valley’s air quality as a big or moderate problem and the perception that traffic congestion is a problem in the

Valley was significantly higher this year than in the prior four years. It is likely that the strengthening of the local economy has generated increased concern and discussion about growth and congestion.

2. Recall of advertising related to efforts to reduce pollution and frequency of driving alone increased slightly in 2017 after several years of decline, however it remains significantly lower than the 2013 and 2012 measures. Specific recall of the all three advertising messages also increased with awareness of traffic reports reminding drivers to use alternate modes up significantly. Despite these increases and although favorability of advertising about alternate modes of travel remained stable and strong in 2017, the percentage of residents who indicated they did “nothing” in response to the ads unfortunately increased significantly and the percentage of residents who indicated they were driving less often returned to a depressed level after spiking last year. The challenge is for Valley Metro to continue to promote the need for changing travel behavior as a way to address growing concerns about growth and congestion, but within a growing economy when residents are less likely to make “sacrifices” or change to a more conservative behavior.

3. Unfortunately total alternative mode usage decreased slightly in 2017, and this was primarily due to a decline in the percentage of commuters commuting via carpools and vanpools. Convenience continues to be the primary appeal for alternate mode usage this year, with less motivation from cost savings potential. This is cycle that we have seen repeated over the years – when the economy is tight and people are concerned about costs they are more likely to use public transit and other alternate modes as a way to tighten their belt, but as soon as the economy shows sign of improvement, behavior reverts back to what is most convenient.

4. A notable proportion of non-alternate mode users are willing to consider making some changes to their commute behavior, with the primary motivations being environmental/community benefits, and others still indicate they would be motivated by costs savings. While improvements in frequency and reach of public transit are commonly cited “needs” before changes will be considered, carpooling continues to be the best option for commuters and looking for resources at work is typically the starting place. With the general lack of awareness of transportation coordinators and/or encouragement for alternate mode usage at large companies, there continues to be opportunity for Valley Metro to work with businesses to strengthen these programs.