

**Valley Metro
TDM Survey Results 2016**

Spring 2016

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 March 24 and May 17, 2016. Results are based on 401 telephone interviews conducted with 201 male and 200 female residents. Quotas were set to target approximately three quarters of employed residents, either full or part time (employed n=301), while remaining residents were either unemployed, house-spouses, students, or retired. The survey took approximately 14 minutes to complete. The total sample has a margin of error of $\pm 5.0\%$.

Perceptions of Valley's Major Issues

- Approximately one in five (21%) of those surveyed mentioned an *air quality/transportation*-related issue as being one of the most important issues facing the Valley. This is comparable to the 24% recorded in 2015.
- *Education* and *economy/unemployment* were the other top concerns among residents this year (mentioned by 34% and 26%, respectively). Immigration (11%) and politics (10%) were among the top most important issues residents feel the Valley is faced with in 2016.
 - While the proportion of mentions for the economy/unemployment and immigration are essentially the same as last year, residents were significantly more likely to express concern over *politics* as compared to two years ago.
 - And, conversely, concern about *water conservation* significantly decreased this year to a more normalized 5%. (In 2015, concern rose sharply, to 13%, possibly due to extra media attention at the time related to drought issues.)
- Almost nine in ten residents (87%) think the Valley's traffic congestion problem is big (44%) or moderate (43%). These figures are comparable to figures recorded in 2015.
 - While most residents perceive traffic congestion to be a problem, far fewer report personally experiencing it. Just over one-half of residents said the Valley's traffic congestion was a big (18%) or moderate (35%) problem for them personally.
- Almost nine in ten residents (86%) think the Valley's air quality problem is big (37%) or moderate (49%). Women, lower income households, and those who drive alone are more likely to find air quality to be a big issue.



Media Awareness

- Recall of High Pollution Advisories was measured for the first time in 2016. More than three-quarters (78%) of residents recall notifications in the past six months. Young people are less likely to recall these notifications (62%).
 - The top source of notification is television with 51% of residents recalling seeing or hearing about high pollution advisories via TV. Older residents are significantly more likely to have heard the notifications on TV (78% vs. 28-43% for other age groups). Only 7% of residents who recall hearing/seeing notifications in the past six months cited their employer as the source of that information.
- Recall of Valley Metro advertising was essentially the same in 2016 as it was the past two years; 29% of residents recalled seeing or hearing advertising in the past year. However, awareness remains significantly lower than the 42% to 56% measured in 2009-2012.
- When asked whether they recalled having seen or heard specific types of advertisements, just over one-third (34%) recalled hearing traffic reports reminding drivers to use alternative modes of transportation, representing a decline for the third year (36% in 2015, 42% in 2014 and 51% in 2013). Recall of a mail piece for ShareTheRide came in at 9%, a dip, but statistically insignificant to last year. For the second year, residents were asked if they have seen anything online encouraging them to evolve or change their commute method; 16% recalled this type of online advertising, relatively unchanged to 2015.
- Attitudes toward advertising that encourages people to use alternative modes of transportation continue to be positive; three in four residents (75%) viewed this type of advertising as very (36%) or somewhat favorable (39%).
- Approximately one-half of residents surveyed (49%) recalled seeing or hearing news stories about Valley Metro services, transit services, traffic congestion, or air quality in general. This level of recall represents a continued downward trend in awareness of transit related news stories, but recall of news stories remains greater than recall of advertising (49% vs. 29%).
- Driving less often was reported by the largest proportion of respondents aware of advertising as their response to hearing advertising or news stories (16%), followed by carpool or vanpool (11%) and combine trips (7%). Driving less and combining trips rose significantly since last year, but that increase brings both scores in line with prior years.
- Like last year, 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 (49%).



Commuting Behavior

- The percentage of employees/students using traditional alternative modes of transportation (i.e. bus, bike, light rail, walk, carpool, or vanpool) was generally similar compared to recent years (20% some traditional AMU and 10% always traditional AMU). Excluding teleworking and compressed-schedules, approximately seven in ten, or 70% of employees/students indicated that they drive alone always.
- About one fifth (21%) of employed residents or students indicated they carpool which is the highest level since 2008.
- Total alternative mode usage including teleworking and compressed schedules stands at 49%, an increase over the past three years, and significantly higher than the 37% recorded in 2012.
- As a percentage of trips, excluding teleworking and compressed work schedules, approximately one fifth (22%) of total trips from surveyed employees/students were via an alternative mode of transportation, the highest percentage reported in six years. The percentage of carpooling trips increased as well to 13% (compared to 10% in 2015).
- As a percentage of trips, alternative modes (including teleworking and compressed work schedules) accounted for 31% of residents' trips. This is similar to the 30% measured in 2015.
- In 2015, the carpool frequency among carpoolers remained similar to recent years (3.1 days per week average), while the percentage of those who carpool is 21% overall (the highest percentage since 2008).

Comparison of Large and Small Organizations

- The majority (86%) of residents surveyed who work in large organizations indicated that they at least drive alone or use a motorcycle to commute to work, while approximately one quarter (27%) indicated using a traditional alternative mode of transportation. Approximately half (52%) of employees from large organizations reported using any kind of alternative mode of transportation. This is an increase compared to the 43% recorded in 2015.
- For the first time employed residents in larger organizations have surpassed those in smaller organizations in reporting the use of all alternative modes of transportation (52% vs. 41%).
- At the highest level in the past 5 years, alternative mode trips accounted for 36% of work trips among employees of large organizations, and for 30% of work trips among employees from small organizations.

Perspectives on Alternative Mode Usage

- Employees and students who use alternative modes of transportation most often indicated that convenience (43%) and saving gas/money (22%) are the primary motivations for using those modes of transportation. In 2016, significantly more alternative mode users cited convenience as their main reason (43% up from 29% in 2015).
- On average, carpoolers/vanpoolers reported having an average of 2.3 people in the carpool/vanpool, with nearly three-quarters having two people.



- When asked how they would go about finding partners for carpooling/vanpooling, employees most often indicated they would contact friends/coworkers/word-of-mouth (38%, significantly higher than the 26% in 2015.). Continuing a trend seen last year, the proportion of employed residents who said they would seek a carpool partner through their place of employment declined for the fifth consecutive year (11% in 2016 is not statistically significant compared to 2015, but it is statistically significant to 2012-2014).
- Approximately one in four (28%) employees were aware that Valley Metro offers an online matching system (up significantly from 20% in 2014 but comparable to 2015). It should be noted that the question wording was changed slightly beginning in 2014 to include not just carpool and vanpool partners, but also “*transit or bicycle partners*”. Like last year, none of those who said “yes”, were able to correctly identify the name of the service.
- After a significant drop last year, the proportion of employed residents who indicated “yes,” they would consider using Valley Metro’s online matching system increased significantly in 2016 to 67%, which is consistent with 2014 levels.
- Slightly less than half (49%) 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 comparable with recent years.

Factors Affecting Commute Behavior

- Similar to recent years, just under two-thirds (61%) 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 (15%) and bus system (14%) were at the top of the list of suggested improvements.
- Of the 25 residents who were asked how likely an improved and expanded bus system and schedule would encourage them to drive alone less often, 9 or 26% provided “9” or “10 – very likely” ratings, representing an increase from the 12% recorded in 2015. In fact, 8 of those 9 respondents indicated their likelihood was a 10 out of 10.
- More than two-thirds of (68%) employed residents surveyed indicate their company does not have a transportation coordinator; virtually all of those reporting a transportation coordinator work at a company with more than 50 employees.
- About four in ten (42%) employed residents surveyed indicated their company offers resources that provide information about ways to commute to work other than driving alone. This is in line – at a middle point – between the last two years of measurements. Again, those who work in larger companies are more likely to say their employer provided AMU resources.
- When asked about the types of information they would want at their worksite, carpool related information was most frequently mentioned by employed residents (11%). However, they were most likely to say they were not interested in this type of information (55%). The proportion who answered they were not interested in this information significantly increased from 2014 (42%).



- Fewer than four in ten (38%) 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 came back to incentives or rewards (15%), but more (40%) 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 remains similar, with occasionally work from home seeing the highest proportion of “9” to “10 – very willing” ratings (48%), followed by work a compressed work week (37%).
- Residents were given a list of types of information and asked to indicate which would be most likely to encourage them to consider alternative modes of transportation (multiple responses were allowed). Messages relating to the personal benefits of saving money continued to resonate strongly (selected by 57% and 63%, respectively). All other messages received significantly lower scores than last year. Last year, residents were asked for the first time if knowing the use of alternative modes can reduce your carbon footprint would encourage them to consider using them. At that time one-half indicated it would, but that has since fallen to 23%.

Conclusions

1. Air quality and transportation concerns decreased for the second row in 2016, coming in behind Education (which increased for second year) and the economy. Immigration and politics came in ahead of each of the individual transportation components. These changes are reflective of the current focus of media coverage related to recent education-proposals as well as the presidential campaign. Water conservation which had peaked last year declined as a concern to a level consistent with 2012-2014 levels.
2. Although recall of advertising related to efforts to reduce pollution and frequency of driving alone did not decline significantly in 2015, it remains at the lowest level reported in the last eight years. Specific recall of the advertising messages declined as well. However, favorability of advertising about alternate modes of travel increased significantly in 2016, and recall is highest among those who already believe traffic congestion is a big or moderate problem. This represents an opportunity for Valley Metro as the market is supportive of alternate mode usage and is showing increased use of alternate modes. Increased advertising could help inflate the already positive shift. In addition, while the percentage of residents who indicated they did “nothing” in response to the ads stayed consistent, there was an increase in the percentage of residents who indicated they were driving less often or combining trips
3. Total alternative mode usage increased slightly in 2016. The percent of commuters and percent of trips using alternative modes reached the highest level since 2008. Specifically, carpooling saw a rise in 2016. Those who use alternative modes of transportation were significantly more likely this year to say they use it because it’s convenient. The percentage of people who would find a carpool partner through people they know increased to 38% in 2016 – the highest level in the past



five years. ShareTheRide.com also significantly increased from less than 1% to 2% of people mentioning that's how they would find a carpool partner.

4. In 2016, traditional alternative mode usage was very similar between large and small companies; however, there is a higher rate of employees taking advantage of compressed work weeks at large companies as compared to small companies. This change brought the overall usage of alternative modes at larger organizations to more than 50% for the first time. This is another positive shift in the market.
5. As expected, there is a large disparity between large and small companies when it comes to alternative transportation options discussed and encouraged at the workplace. Larger organizations are significantly more likely to have a transportation coordinator and to provide alternative mode transportation resources. As a result, employees at larger organizations are more aware of options and information available. Employees at smaller organization are less likely to note any information they'd like their employer to provide about transportation alternatives.

