2012 State of the Commute Survey
Twin Cities Region

Executive Summary, June 2012
Prepared for Metro Transit by Clarity Coverdale Fury & ISG

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Research Objective

The purpose of the 2012 State of the Commute survey is to document current patterns in commuting behavior and attitudes about specific commuter transportation services in the seven county Twin Cities metro area. This is the first State of the Commute survey conducted by Metro Transit and is intended to provide baseline data for future studies.

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Key Findings

- Nearly one-quarter of commuters use an alternative to driving alone.
- On average, commuters travel approximately 16 miles one-way to work. The average travel time is approximately 23 minutes.
- Alternative mode users are more satisfied with their commute.
- Substantial support exists among commuters for a number of transportation options.
- Ease of commute has remained unchanged for most. However, a greater percentage report that their commute has "gotten easier" compared to one year ago than report it is "more difficult".
- Strong potential for converting drive alone commuters exists.

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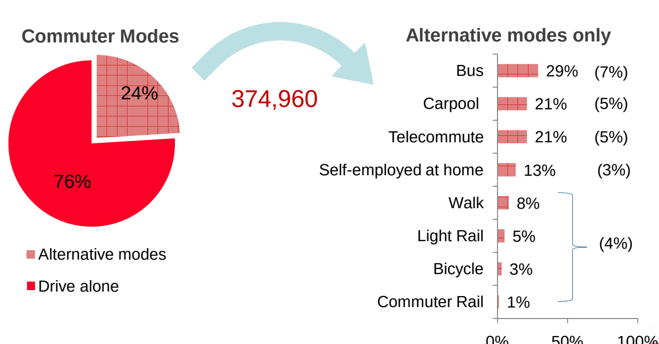
Substantial Use of Alternative Modes

Nearly one-quarter of metro area commuters use alternative modes

- Approximately one-quarter of metro area residents (24%) commute to work using an alternative form of transportation.
- Of those using an alternative form of transportation, bus (29%) is the most commonly used mode followed by carpool (21%) and telecommuting (21%).



Thinking about a typical day LAST week, how did you get to work? (N=800/weighted)

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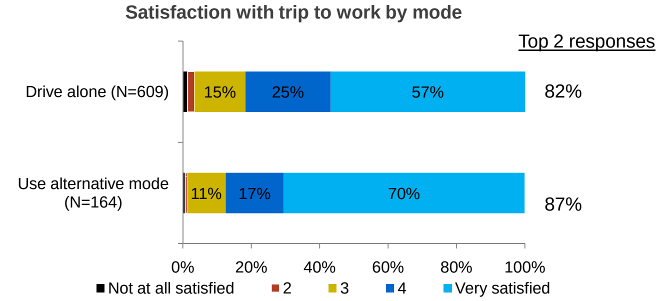
Trip to Work Satisfaction

Alternative mode users are more satisfied with their trip to work

- Commuters who use an alternative mode report statistically significant higher satisfaction scores than those who drive alone.



Overall, how satisfied are you with your trip to work? Use a scale of 1 to 5, where 1 means not satisfied at all and 5 means very satisfied. (weighted data) "Don't Know" responses are suppressed.

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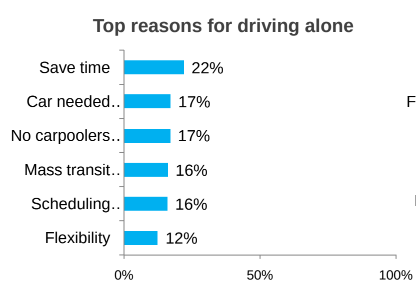
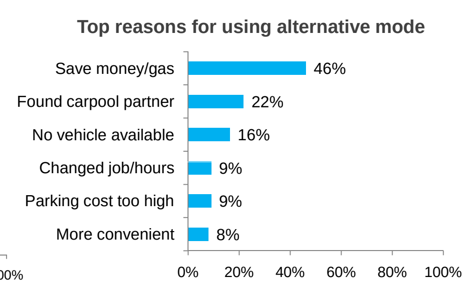
Top Reasons for Mode Selection

Primary reasons for mode selection are saving time and saving money

- For those who drive alone, the primary reason for doing so is saving time (22%). In contrast,
- For those using an alternative mode, the primary reason is saving money/gas (46%).





What were the reasons you began [driving alone/alternative mode] to work? Multiple response allowed

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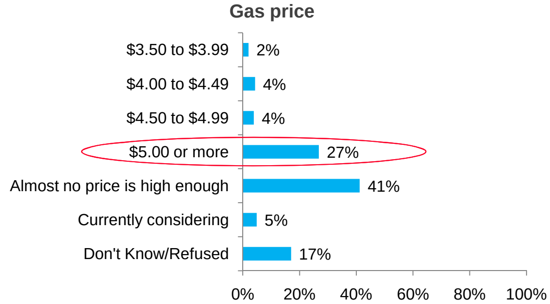
$5 Gas Prompts Alternative Mode Consideration

Alternative modes spike at $5/gallon

- The $5.00/gallon is a key threshold for prompting alternative commuting options. More than two-fifths of those who currently drive alone (42%) would consider using public transportation or ridesharing if gas prices reached $5.00 or more.



How high would gas prices have to go before you would consider using public transit or ridesharing? (N=682/weighted)

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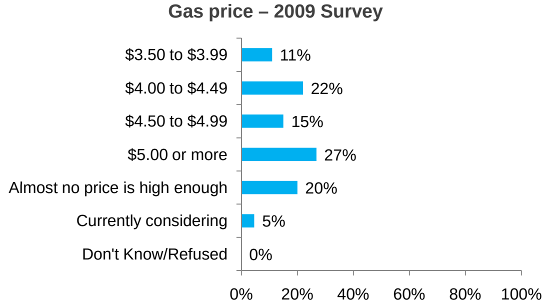
2009 Potential Rider Survey – Gas Price Impact

Consideration of bus utilization based gas prices

- Based on findings from the 2009 Potential Rider Survey, four-fifths of the respondents (80%) would consider using the bus if gas prices reached $5.00 or more.



How high would gas prices have to go before you would consider using the bus?

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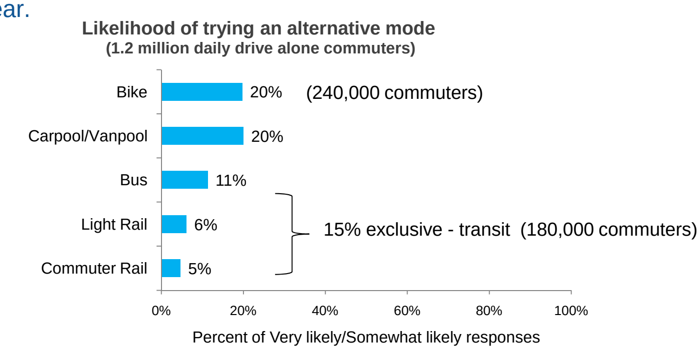
Potential for Converting Drive Alones

Greatest potential for conversion among alternative modes are carpooling and biking

- Of those who currently drive alone, one-fifth indicate that they would be somewhat likely or very likely to try carpooling (20%) or biking (20%) in the next year.

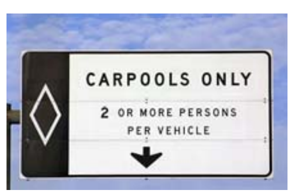


I am going to read you a list of commuting options other than driving alone. For each, please tell me whether you are not likely, somewhat likely or very likely to try the following mode in the next year? (N=610/weighted)

Strong Interest in Carpooling Opportunities

Strong interest in, and need for, carpooling opportunities exists

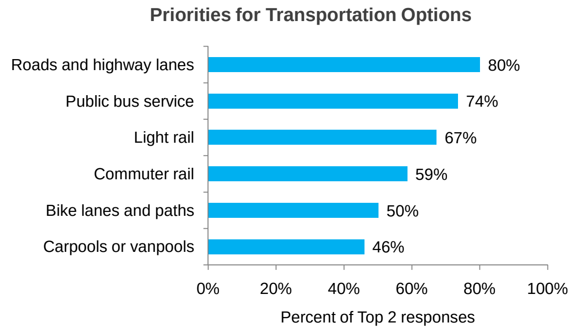
- When asked specifically why they do not currently carpool, more than two-fifths (42%) cite the lack of a carpool partner.
- The single greatest motivator for trying an alternative transportation mode is the identification of a carpool partner (14%).
- When asked to provide the reason(s) one began driving alone to work, approximately one-sixth (17%) indicate that they drive alone because carpools are not available.
- More than one-fifth (22%) report that they use an alternative mode because they found a carpool partner.



Commuters Support Multiple Options

Substantial support for a number of transportation options

- When asked about public transportation priorities in the Twin Cities metro area, five of six transportation options received a Top 2 score of 50% or more.



Using a scale of 1 to 5 with 1 being not a priority and 5 being a high priority, tell me how much the following transportation options in the Twin Cities metro area should be a public priority.
(N=761-793/weighted data) "Don't Know" responses are suppressed.

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Implications

- Commuters support investments across a variety of transportation options
- Promotion of higher commuter satisfaction among alternative users.
- There is potential to increase the use of alternative modes, with carpooling, biking and transit.
- Cost savings and time savings are leading drivers. Little evidence that environmental issues are key drivers for conversion to alternative commuting modes.

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Questions ?

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