A Survey of Downtown Ann Arbor Commuters and Decision-Makers

2018

Prepared by

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Introduction

Method

Two online surveys were conducted simultaneously in 2018, one of commuters to downtown Ann Arbor and one of downtown Ann Arbor decision-makers. Both populations were invited by the getDowntown organization using email invitations followed up with telephone calls from the director and other getDowntown staff to encourage participation. Employers were asked to have their employees complete the online commuter survey which deals with their commuting practices and interest in alternatives to the single occupancy vehicle (SOV). Decision-makers themselves were asked to complete a separate survey dealing more with their view of getDowntown and its value for their employees and for the organization as a whole.

The samples are entirely voluntary, not random. A careful reading of the results suggests that they appear to be fairly representative of the attitudes and commuting behaviors of the downtown business, professional, government, and not-for-profit sectors.

The commuter sample includes 380 responses and the Decision-maker survey includes 77 respondents.

Key findings

Decision-Makers

- 87% of respondents to the Decision-Maker survey said they are Very Satisfied with the services of getDowntown.
- Decision-makers value getDowntown for several things, but above all as the source of the go!pass for their employees, a benefit they consider helpful in most cases and crucial to some of the smaller businesses as an employee recruitment and retention tool. Almost all, 97%, or employers responding to the survey distribute the go!pass.
- The decision-makers perceive the threat of increased traffic congestion and scarcity of parking as very important to their organizational and business success. Thus, they perceive the getDowntown programs providing new employee commuting information, getDowntown advocacy and informational resources as useful.
- The getDowntown programs are not regarded as only feel-good programs, but as important aspects of doing business. For example, 36% indicated that the getDowntown programs were a significant or very significant factor in decisions about locating or retaining their organizations in the downtown area. In addition, many of their open ended comments echoed the sentiments of their employees about how important the go!pass is to their livelihood and thus to employee recruitment and retention.
- Decision-makers and their organizations provide a range of commuting information that encourages the use of alternatives to the SOV for commuting. The website and social media, as well as the newsletter are used by many of the employers, for example.
- On the other hand, relatively few provide tangible incentives beyond the go!pass such as incentives to live close to the job-site, or access to the qualified transportation freeing benefit. Nor do many provide assistance in setting up carpools, or provide a company vehicle for use during the workday in lieu of relying on employee's vehicles.
- Also, 69% of employers say they are provide some type of parking benefits. This includes 25% who pay the entire cost of computer parking for some employees, and another 10% who pay the entire cost of paring for all employees. In addition, 23% provide free on-site parking.

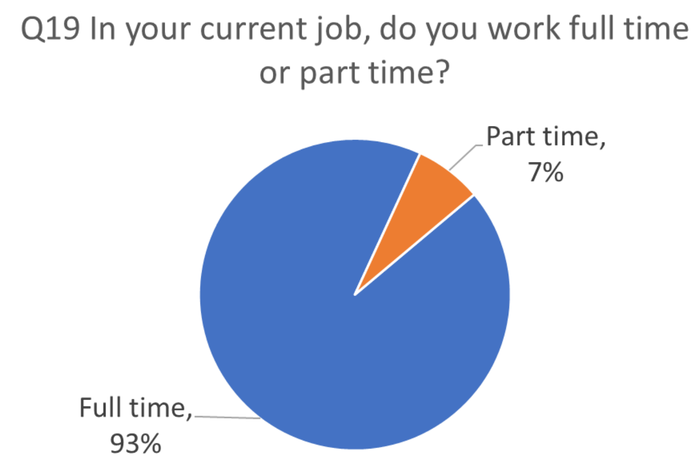
Commuters

- More commuters (42%) responding to the survey say they drive alone to work, than commute by any other mode. The means that, conversely, 58% commute in some other way, most often by TheRide (including Park & Ride, 18%), bicycling (11%), walking (11%), carpooling (6%), or a combination of these modes (12%). Those who commute on TheRide tend to be younger and lower in income that those who drive.
- Twenty one percent (21%) say that they regularly telecommute from home, not full time, but most commonly one day a week.
- Those who drive to work (57%) tend to say they do so because it is the most convenient mode. Also, 43% say it is a matter of their time, implying that alternatives would be too slow. About one-third (36%) say they need their car at work to run personal errands as a reason to need their car during the workday. (Multiple responses were allowed, so the percentages cannot be properly summed.)
- While most reasons for wanting to drive to work involve personal preference, some are aided by their employers. For example, 31% cite the benefit of free parking as a reason to drive, while 19% cite the need to make work-trips using their own vehicle.
- A lack of parking does not appear to greatly trouble most of the downtown commuters. Almost three-fourths (74%) of those who drive to work say their parking is paid for in advance, which means that they are likely to find a parking place without much, if any, difficulty. However, 31% of all SOV commuters say that it takes them three to five minutes or even more than ten minutes to find a parking place, a substantial waste of time.
- Of all commuters, 81% said that they had not changed their commuting mode in the past year, which, conversely, means that 19% did change. However, when the nature of the change is examined, it turns out that 5% of all downtown Ann Arbor commuters changed from an SOV to an alternative mode. But 4% changed from an alternative mode to commuting by SOV. The balance, 9%, changed from one alternative mode to another.
- The most frequent reason given for changing the way a commuter gets to work is that he or she had moved to a new home (35%) or that the workplace had changed (22%).
- Many of those who did change modes indicated that they had changed more than once, an indication that the tendency to change modes is fluid for some people.
- Of those who drive alone to work, a total of 38% indicated a substantial interest in considering an alternative means of commuting, an indication that there is a market for moving people toward alternative modes. Approximately half of those most interested say they would change to TheRide, while roughly the same number say they would bicycle.
- In the spirit of encouraging alternative commuting modes, 68% of the respondents said that they had been offered a go!pass. Those who were offered a go!pass are more likely to commute using TheRide than those who were not, an indication that the go!pass has the desired impact.

Part 1 - Commuter Survey

Chapter 1: Employment Profile

Figure 1 Part time/full time employment downtown

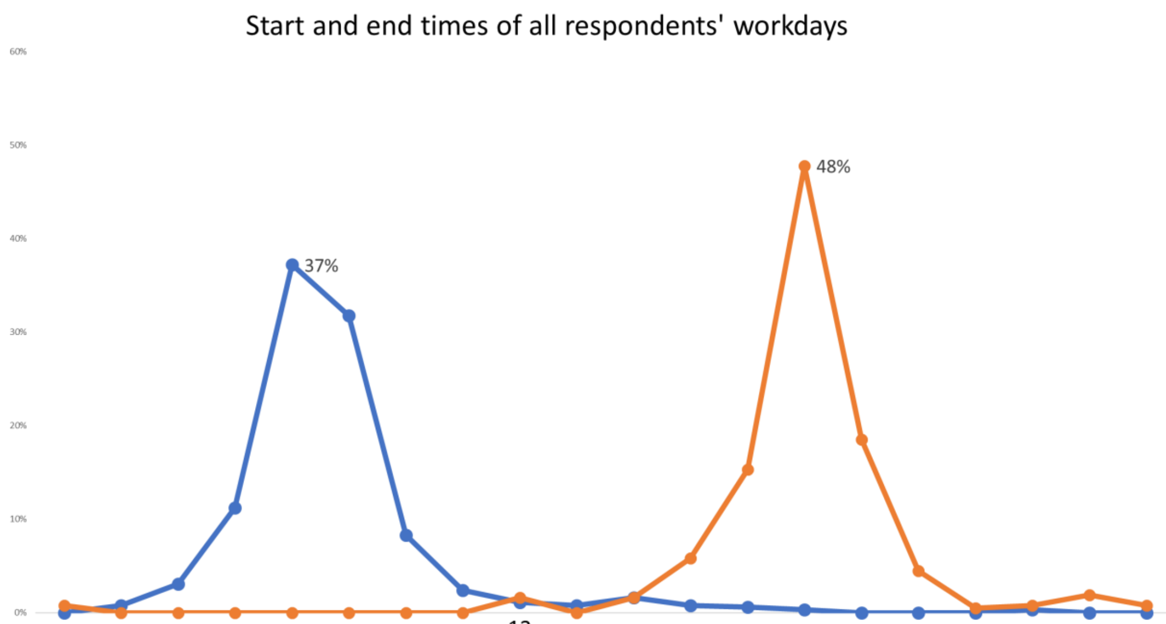


Full or part time employment

Most of the respondents to the getDowntown commuter working in downtown Ann Arbor (93%) work full time. Only 7% work part time.

The workday of downtown commuters is about as one would expect, largely starting the workday at 8:00 or 9:00 AM and working until 5:00 PM, as shown in Figure 2. There is a range of start and end, times, however. A total of 80% start work between 7:00 and 9:00. Similarly, there is a range of end-times. While 48% say they end work at 5:00, total of 82% say they end their work day between 4:00 and 6:00 PM.

Figure 2 Workday start and end time



	2:00 AM	5:00 AM	6:00 AM	7:00 AM	8:00 AM	9:00 AM	10:00 AM	11:00 AM	12 NOON	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM	7:00 PM	8:00 PM	9:00 PM	10:00 PM	11:00 PM
Start time	0%	1%	3%	11%	37%	32%	8%	2%	1%	1%	2%	1%	1%	0%	0%	0%	0%	0%	0%	0%
End time	1%	0%	0%	0%	0%	0%	0%	0%	2%	0%	2%	6%	15%	48%	19%	5%	1%	1%	2%	1%

Figure 3 Work hours: Fixed or flexible?

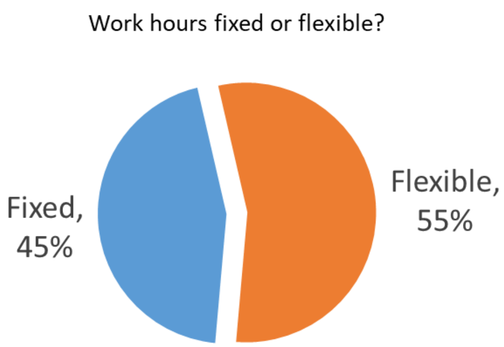
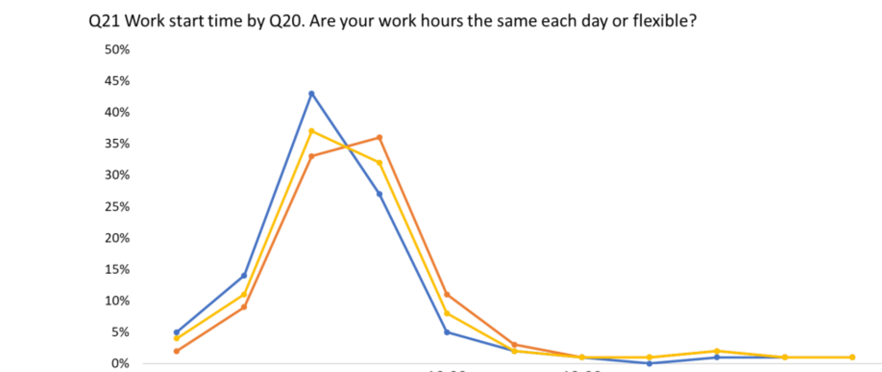
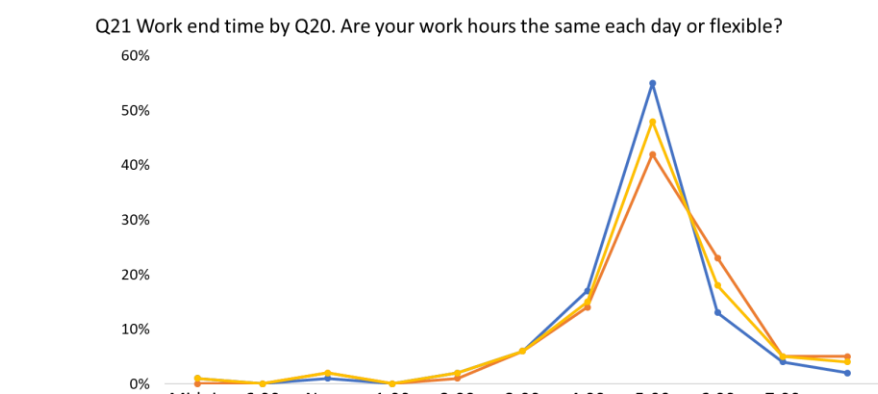


Figure 4 Hour work-day begins, by whether hours are flexible or fixed



	5 AM to 6:59 AM	7:00 AM to 7:59 AM	8:00 AM to 8:59 AM	9:00 AM to 9:59 AM	10:00 AM to 10:59 AM	11:00 to 11:59 AM	12:00 noon - 12:59 PM	1:00 PM to 1:59 PM	2:00 PM to 2:59 PM	3:00 PM to 3:59 PM	4:00 PM or later
Fixed	5%	14%	43%	27%	5%	2%	1%	0%	1%	1%	1%
Flexible	2%	9%	33%	36%	11%	3%	1%	1%	2%	1%	1%
All respondents	4%	11%	37%	32%	8%	2%	1%	1%	2%	1%	1%

Figure 5 Hour work-day ends, by whether hours are flexible or fixed



	Midnight to 6:00 AM	6:00 AM to 11:59 AM	Noon to 12:59 PM	1:00 PM to 1:59 PM	2:00 PM to 2:59 PM	3:00 PM to 3:59 PM	4:00 PM to 4:59 PM	5:00 PM to 5:59 PM	6:00 PM to 6:59 PM	7:00 PM to 7:59 PM	8:00 PM or later
Fixed	1%	0%	1%	0%	2%	6%	17%	55%	13%	4%	2%
Flexible	0%	0%	2%	0%	1%	6%	14%	42%	23%	5%	5%
All respondents	1%	0%	2%	0%	2%	6%	15%	48%	18%	5%	4%

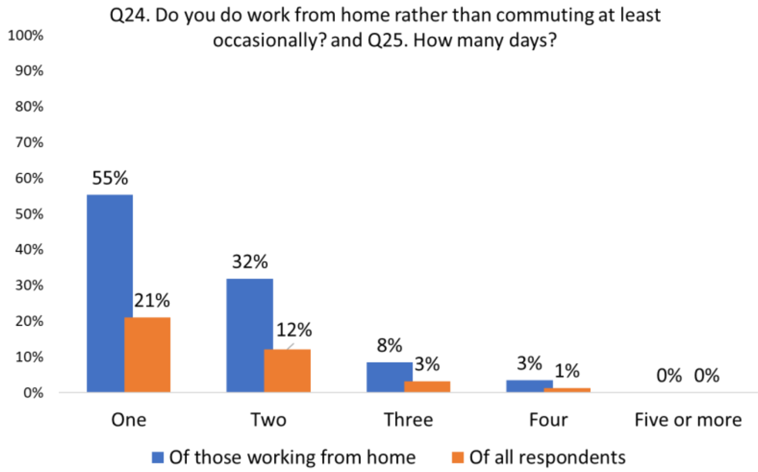
Flexible hours

Slightly more than half of the commuters (55%) say they have flexible hours, a fact that suggests that many people have at least some allowable variation in start times, a fact that could encourage use of transit or carpooling (See Figure 3.)

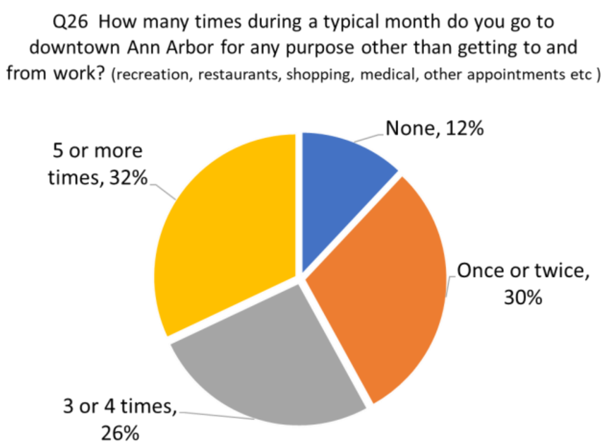
Most (69%) of those who say their hours are flexible offer a range of start times. Most start either between 8:00 and 9:00 AM (33%) or between 9:00 AM and 10:00 AM (36%). (See Figure 4)

The end of the work day also varies, but less than the start time. The peak at the end of the day is much sharper than that at the day's start: 42% of those with some flexibility say they end the day between 5:00 and 6:00 PM, while that is true for 55% of those with fixed schedules. A total of 65% cite end-times of either 5:00 to 6:00 PM, 42%, or 6:00 to 7:00 PM, 23%. (See Figure 5)

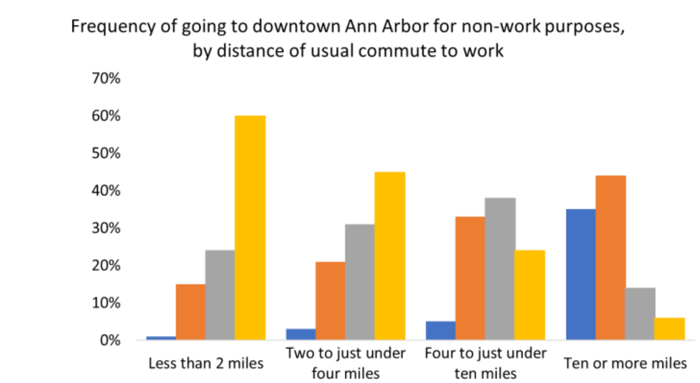
[Figure 6 Telecommuting](#)



[Figure 7 Frequency of going to downtown Ann Arbor for reasons other than commuting](#)



[Figure 8 Frequency of non-work trips to downtown, by distance to downtown](#)



	Less than 2 miles	Two to just under four miles	Four to just under ten miles	Ten or more miles
None	1%	3%	5%	35%
Once or twice	15%	21%	33%	44%
3 or 4 times	24%	31%	38%	14%
5 or more times	60%	45%	24%	6%

Telecommuting

Commuters who telecommuted at least occasionally constitute 21% of the respondents to the downtown commuter survey. Of these respondents, 55% say they do so only one day a week. (Figure 6)

Visiting downtown Ann Arbor for reasons other than commuting.

Most respondents (88%) not only work for employers located downtown, but also visit downtown Ann Arbor at least occasionally for purposes unrelated to work. (Figure 7)

The tendency to go downtown for non-work reasons is closely related to the distance of the commute, which is to say, it is closely related to the location of the commuter's residence. The closer one lives to the downtown workplace, the more likely he or she is to go to downtown Ann Arbor for non-work purposes. (Figure 8)

This makes sense not only from the standpoint of logistics, but also from what we can assume is their greater familiarity with the downtown and what it has to offer.

Chapter 2: Downtown Commuter Demographics

Figure 9 Gender of downtown commuters

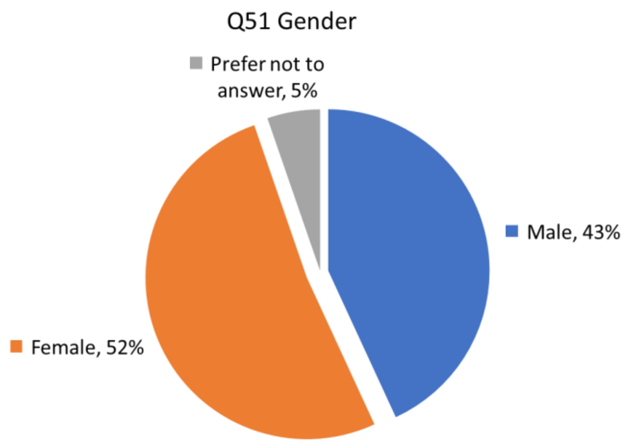
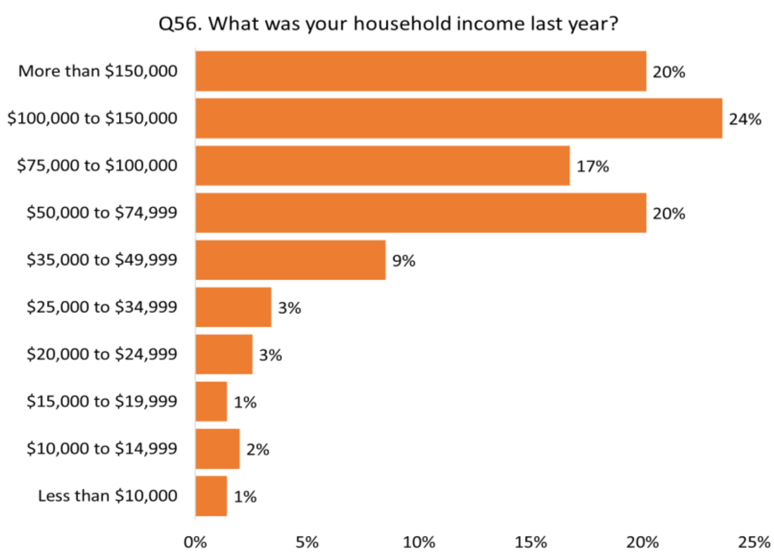


Figure 10 Household income last year



Gender

The gender distribution of downtown commuters is similar to that of the general population. In the total sample, 5% declined to reveal their gender identity. However, 52% identified as female and 43% as male, which is a ratio roughly similar to the general population figures in the census which does not allow for non-response or transgender. (Figure 9)

Income

The household incomes of the commuters tend to be on the high side, with 81% reporting incomes of $50,000 or more annually. This is in stark contrast to users of TheRide, among whom only 32% of the riders report household incomes of $50,000 or more as measured by the 2017 onboard passenger survey conducted by CJI on TheRide. (Figure 10)

Figure 11 Age

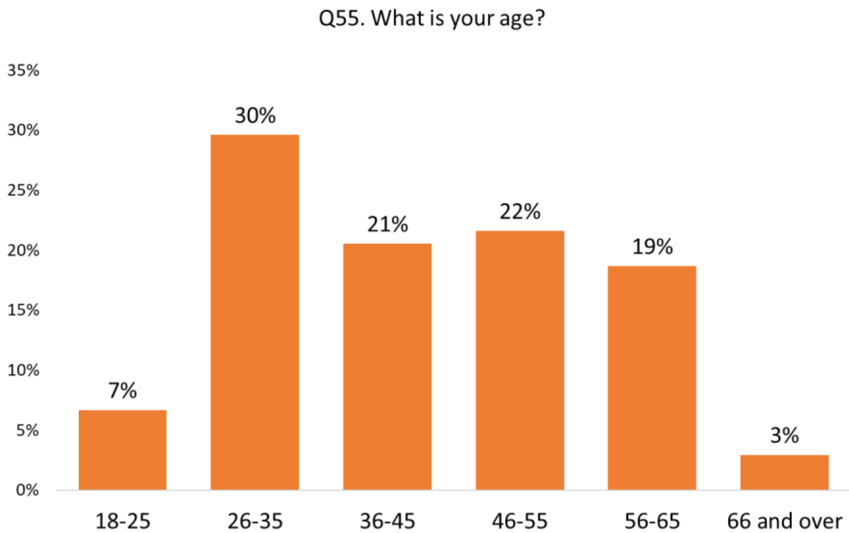
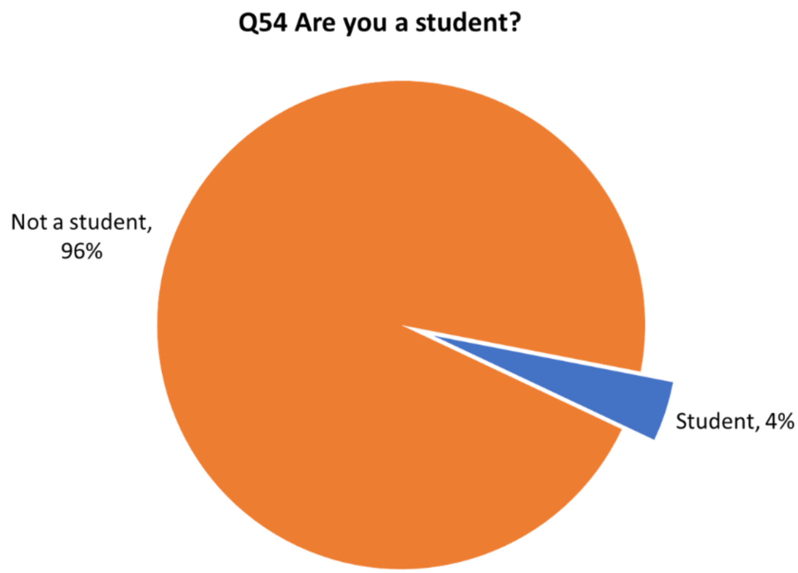


Figure 12 Student?



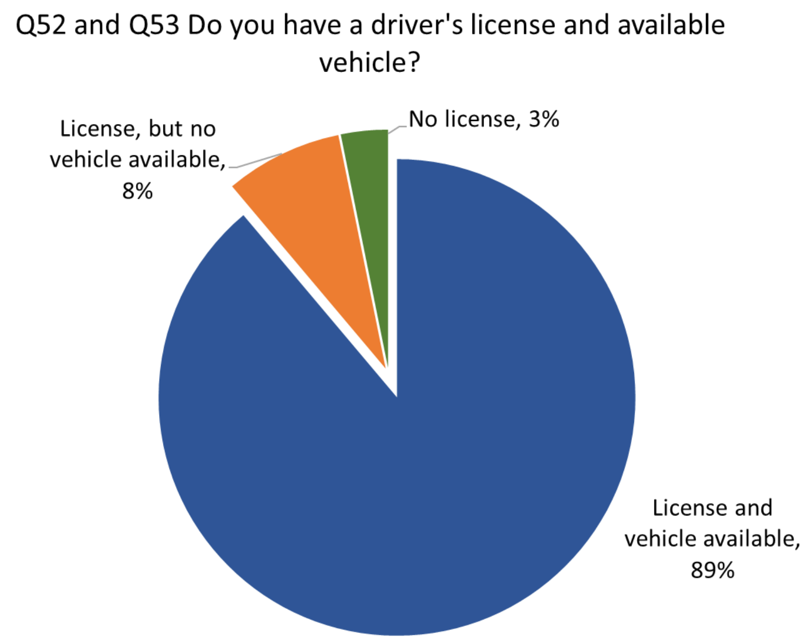
Age

Commuters' ages are widely distributed between 26 and 65. Relatively few are younger or older than that. The largest age cohort among the downtown commuters responding to the survey is the 26-35 year old group, with 30%, compared to 19% to 22% in the older age groups. (Figure 11)

Students

Even in a university town like Ann Arbor, we find that most downtown employees (96%) are not students. Only 4% report that they are students. (Figure 12)

Figure 13 Having a vehicle and valid license



Transportation options

Most downtown commuters, 89% report that they have both a valid driver's license and a vehicle available to them. Only 8% indicate they have no vehicle although they do have a license. Another 3% indicate they have no license.

Chapter 3: Commuting Profile

Figure 14 Number of days a week downtown workers commute

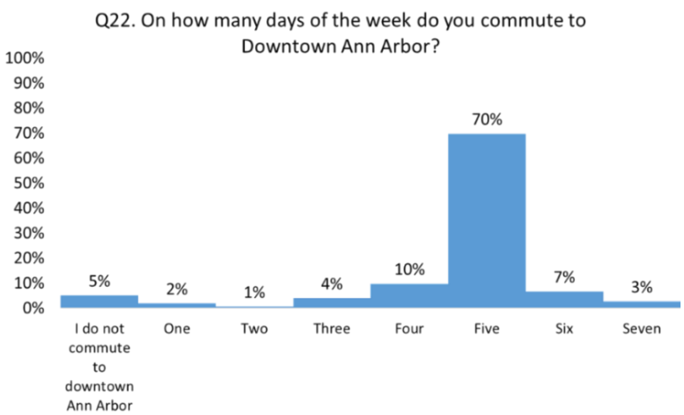


Figure 15 On which days of the week do downtown workers commute?

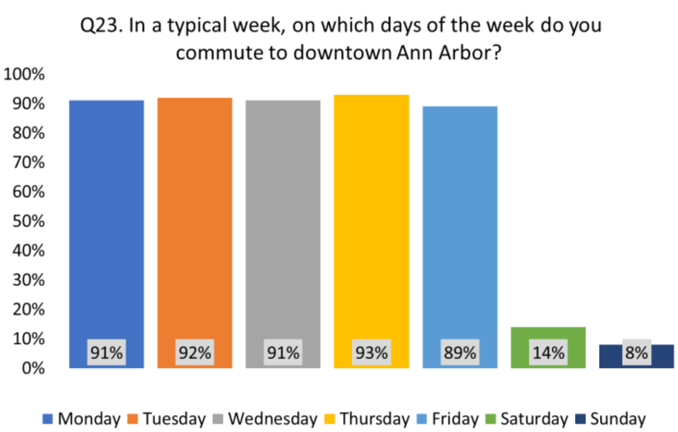
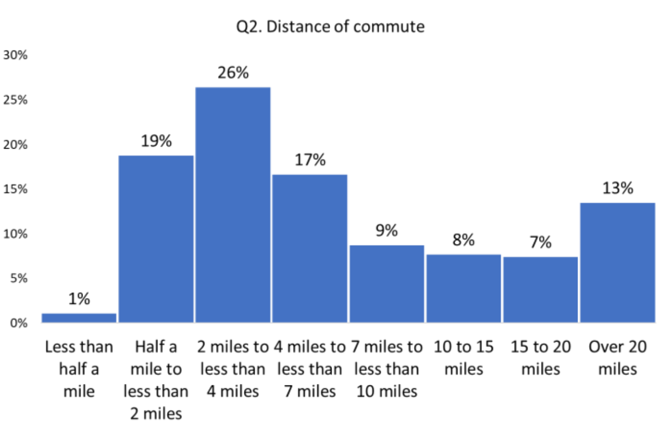


Figure 16 Distance of commute



Frequency of commuting

Most commuters, 70%, say that they commute five days a week to downtown Ann Arbor, while another 10% say they commute four days a week, for a total of 80% commuting four or five days each week. (Figure 14)

In addition, 7% say they commute six days a week (7%) and 3% said they commute seven days a week (3%).

One surprise is that 5% said they do not commute to downtown Ann Arbor. These are likely to be people who, although they work for a downtown employer, may have a traveling position or other position that does not consistently require them to be downtown.

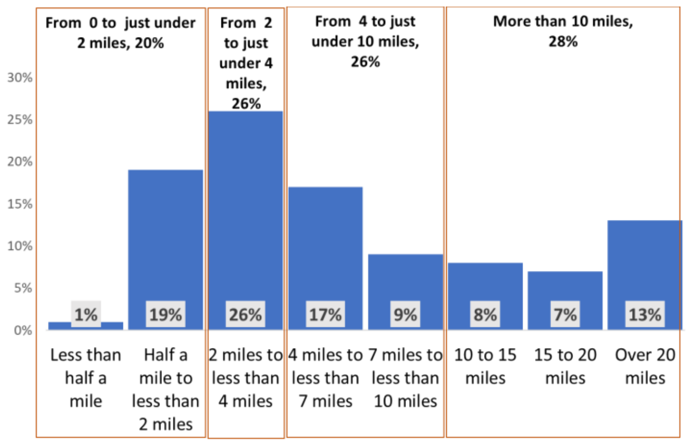
Days of the week on which people commute

Eighty-nine percent (89%) or more of the downtown employees commute on weekdays only, while only 14% commute on Saturday, and 8% on Sunday. (Figure 15)

Distance of the commute

A majority of commuters (totaling 63%) live within seven miles of the workplace, and within that number 46% live within four miles and 20% within two miles. (Figure 16)

Figure 17 Three distance-related segments

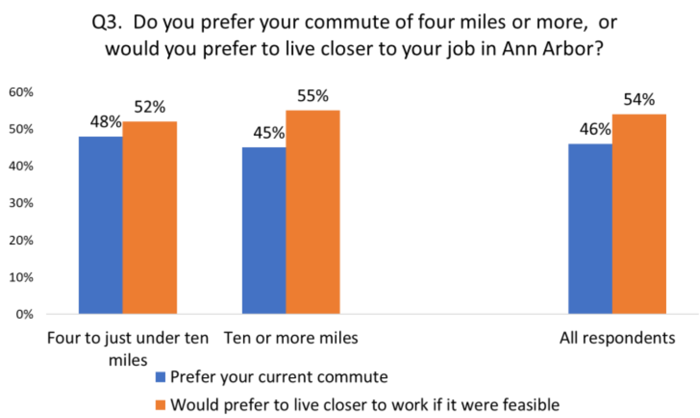


Segmenting commuters by distance of the commute

A total of 20% live close to their job, less than 2 miles away. Another 26% live from 2 to 4 miles away. Another 26% live from 4 to 10 miles away, and the balance, 28%, live 10 or more miles away. (Figure 17)

We can use these four groupings to segment the survey results from the downtown commuters.

Figure 18 Preference for residing at a distance (asked of only those living four miles or more from work)

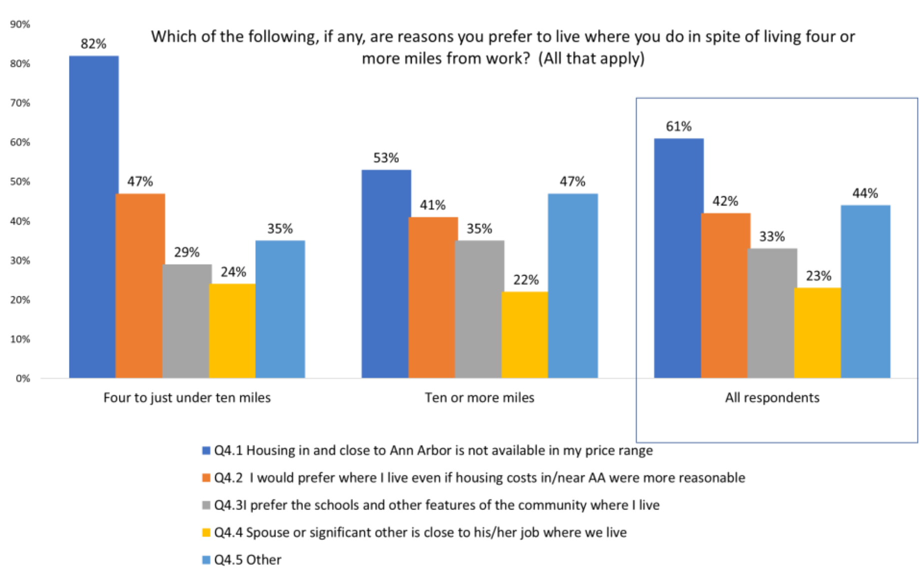


Preference for a longer commute vs living closer to work

Those commuters who have a commute of 4 miles or more were asked whether they preferred that commute or whether they would prefer to live closer to their jobs in Ann Arbor. (Figure 18)

Among all commuters, a majority of 54% say they would prefer to live closer to work if it were feasible. This seems to be slightly more characteristic of those who live 10 or more miles away, but the difference between them and those who live closer is too small to be definitive.

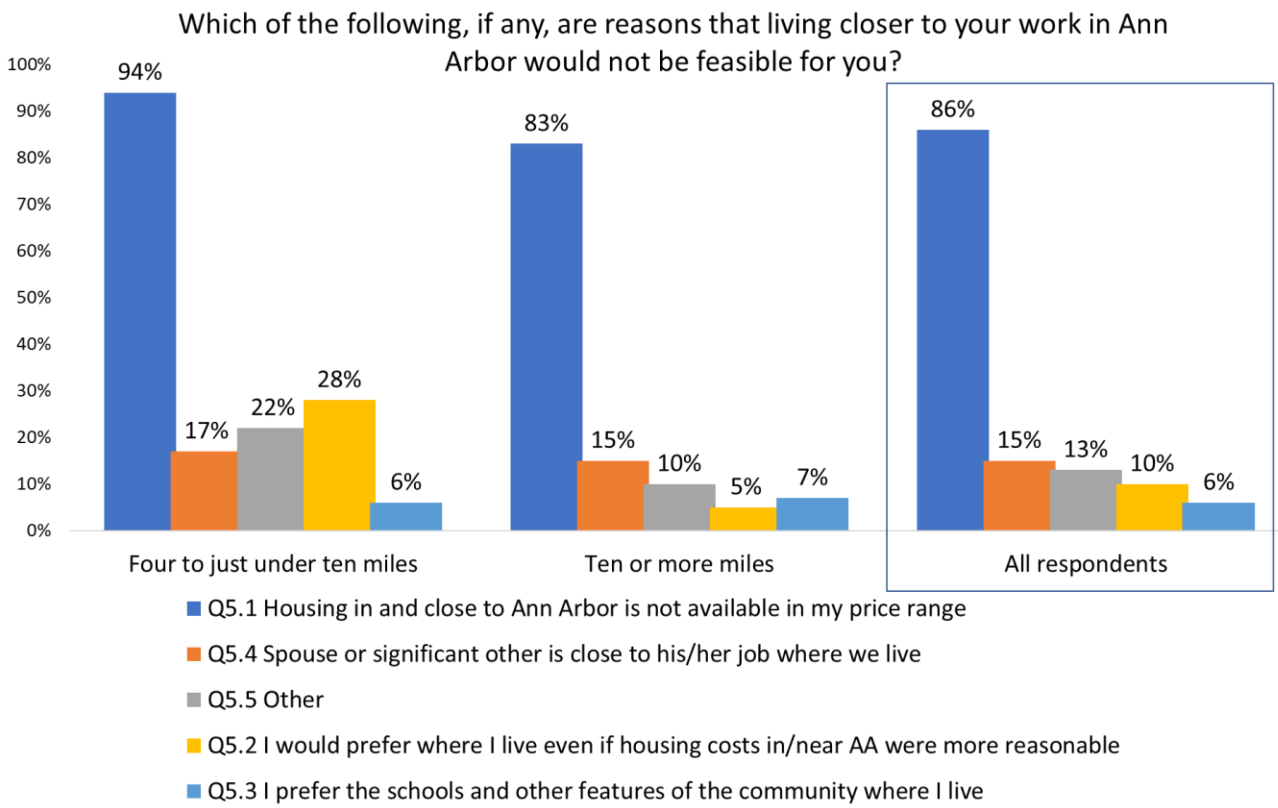
Figure 19 Reasons to for preferring location at a distance



Reasons for making a lengthy commute

The reason most often given for preferring to commute from a distance in spite of preferring a shorter commute, is that housing in and close to Ann Arbor is not available within the commuters' price range. This is cited by 61% of all respondents, and 82% of those who live from four to just under 10 miles from their job. Other reasons involve preference for the community, or for the schools, or the need to be near the job of a spouse.

Figure 20 Reasons for which living closer to Ann Arbor would not be feasible (asked of only those who would prefer to live close, Q3, but find it not feasible)



Feasibility of living closer

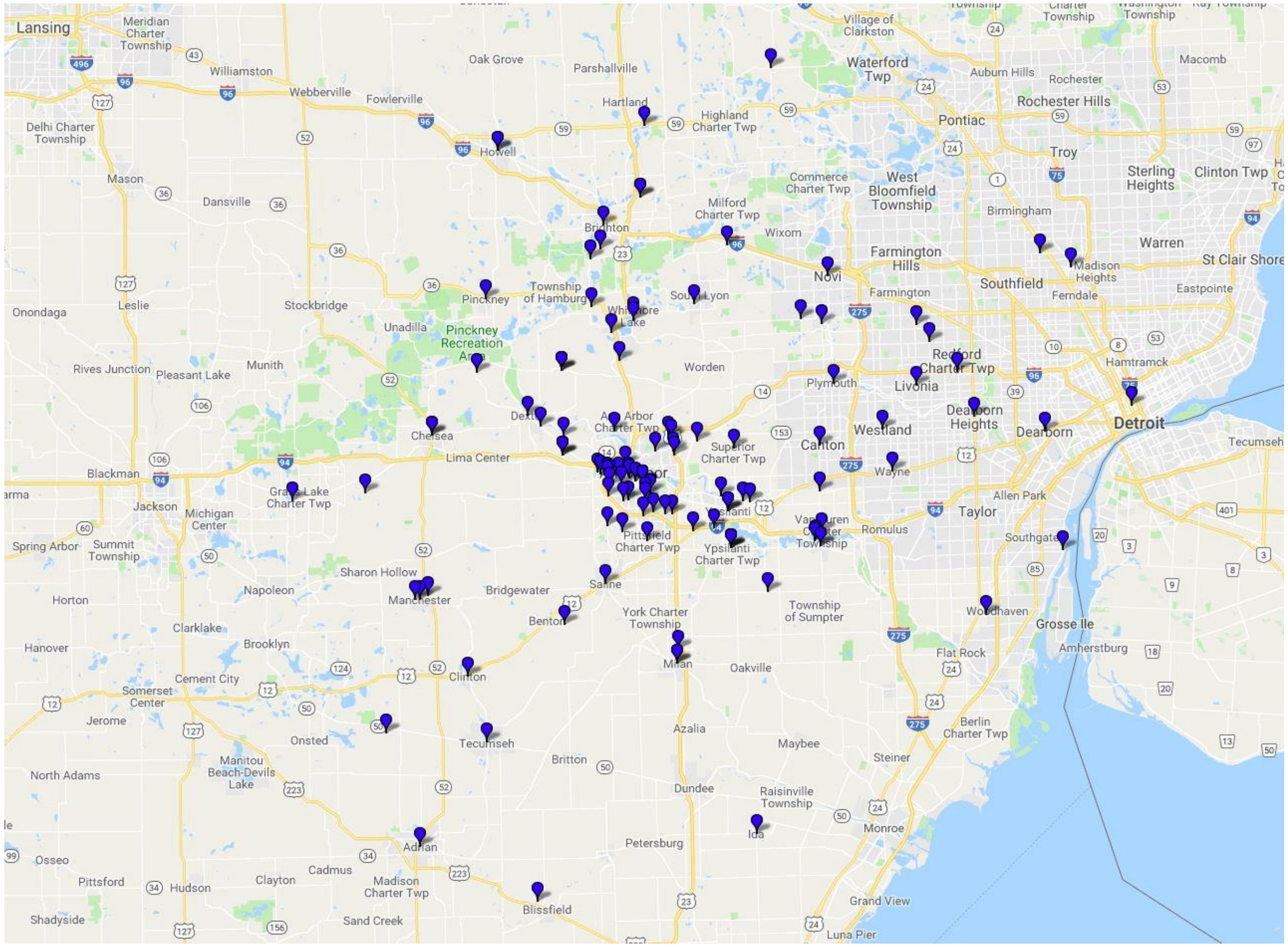
In Figure 19 on the previous page, we saw the reason for which many commuters *prefer* to live where they do in spite of the longer commute it requires. In Figure 20 we consider reasons for which some commuters said it was not *feasible* to live closer to work in downtown Ann Arbor. Respondents who said that it would not be feasible for them to live closer were asked why it was not feasible. Regardless of the distance of the commute, the overwhelming majority cited the cost of housing in and close to Ann Arbor as the reason living closer was simply not feasible for them.

Of all respondents, 13% gave other reasons than those listed in the chart. They are quoted verbatim in Figure 21 on the following page. The comments need not be enumerated thematically. They speak for themselves. There are, however, frequent mentions of an aversion to living in cities, especially Ann Arbor, an aversion based on culture, expense, and simply a preference for rural living.

Figure 21 Other reasons for which living closer to aa would not be feasible or would not be the respondent's preference

Change of location not feasible
Children already settled w/ schools & friends
Day care is not easily available/affordable
Daycare facilities and costs are to high.
Houses have very small yards.
I would prefer to work closer to where I live.
Plus own a home in Novi for a way better price then could replace in Ann Arbor. Also close to retirement age.
Spouse has medical needs that are addressed nearer home.
Spouse prefers rural residence location
Too congested in Ann Arbor. Like current location.
Wish to be close to arts and social scene in Ypsilanti
Prefer current commute
A2 is too expensive, very little diversity, very little decent affordable housing, parking in most places is expensive and scarce/non-existent, hard to get to grocery/basic services
Ann Arbor is 28.5 sq. miles surrounded by reality
Don't want to live near crazy Ann Arbor people
Enjoy the fitness benefits of the longer commute.
ethnic mix of the community I live in
Family is in my current area of residence
Family lives closer to where I live now than Ann Arbor.
Family lives in this home
I actually prefer a little distance to my office ... otherwise I would work too much.
I am not politically liberal; it's nice to work in AA and all but as liberals have been getting increasingly intolerant I'm grateful not to live in AA.
I don't want to live in Ann Arbor - Dexter is great.
I enjoy having a 10 mile bike commute, shorter distances are not as enjoyable.
I have a house. I have a mortgage why would I sell to be in the middle of this mess?
I have dogs and yards are scare and cost extra
I have the same drive time as people that live 5 miles away
I like the community I live in. I am active in it, and have no reason to leave. It would be great if the University of Michigan would move to Ypsilanti.
I live in the town where I grew up
I live on a lake and can afford my mortgage
I prefer not to pay such high taxes due to my income.
Land and population density is better out past the cornfields where the woods get heavy
Less traffic and congestion
More rural where i live
My home is paid off.
Overall it is cheaper to live away from Ann Arbor.
Prefer rural living
The community I live in is quiet and low key
Too crowded in Ann Arbor due to U of M
Too many student apartments. Nothing for 40 and up
Want to be close to Detroit

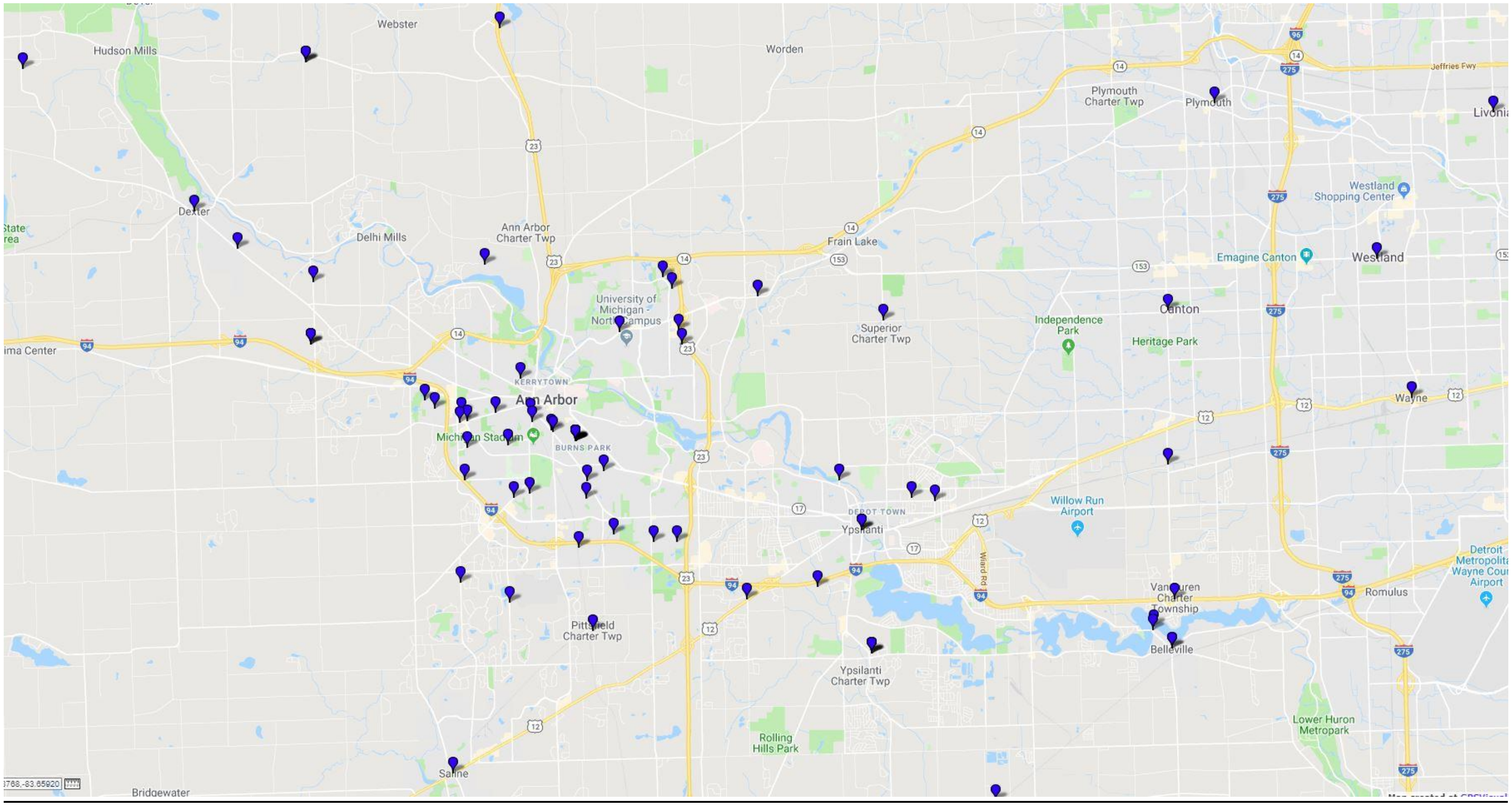
Figure 22 Wide area map of commuter residences



Downtown commuters are coming from a wide range of locations

Commuters are commuting to Ann Arbor from a wide range of locations, including towns a widespread as Adrian and Blissfield, Ida, Southfield, Detroit, Howell, and other relatively distant locations on the periphery of realistic commuting locations. (The locations shown were geocoded using respondent reports of the street intersection nearest their homes.)

Figure 23 Focused area map of commuter residences

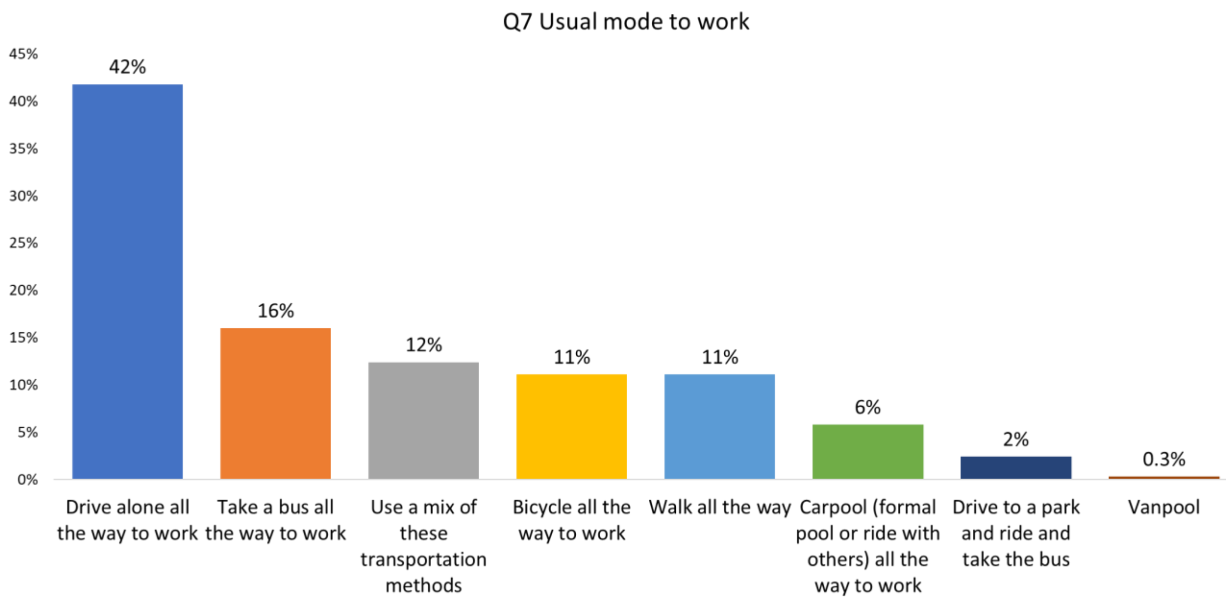


Most commuters are local

Although some commuters are widely scattered, most commute trips originate within the perimeters of the beltway defined by routes I-94, OH-23, and OH-14.

Chapter 4: Usual Mode for Commuting

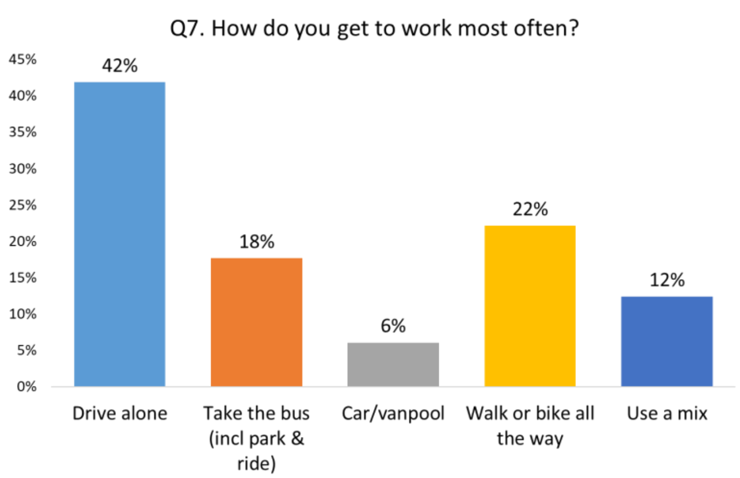
Figure 24 Usual commuting mode (detail)



Commuting mode

As expected, more people say they drive alone to work than use any other mode. Another 15% say they take the bus, while 12% say they use a mix of transportation methods. A substantial number, totaling 22%, say that they either bicycle (11%) or walk all the way to work (11%). Some, 6%, say they carpool to work, while 2% indicate that they drive to a park and ride and take the bus.

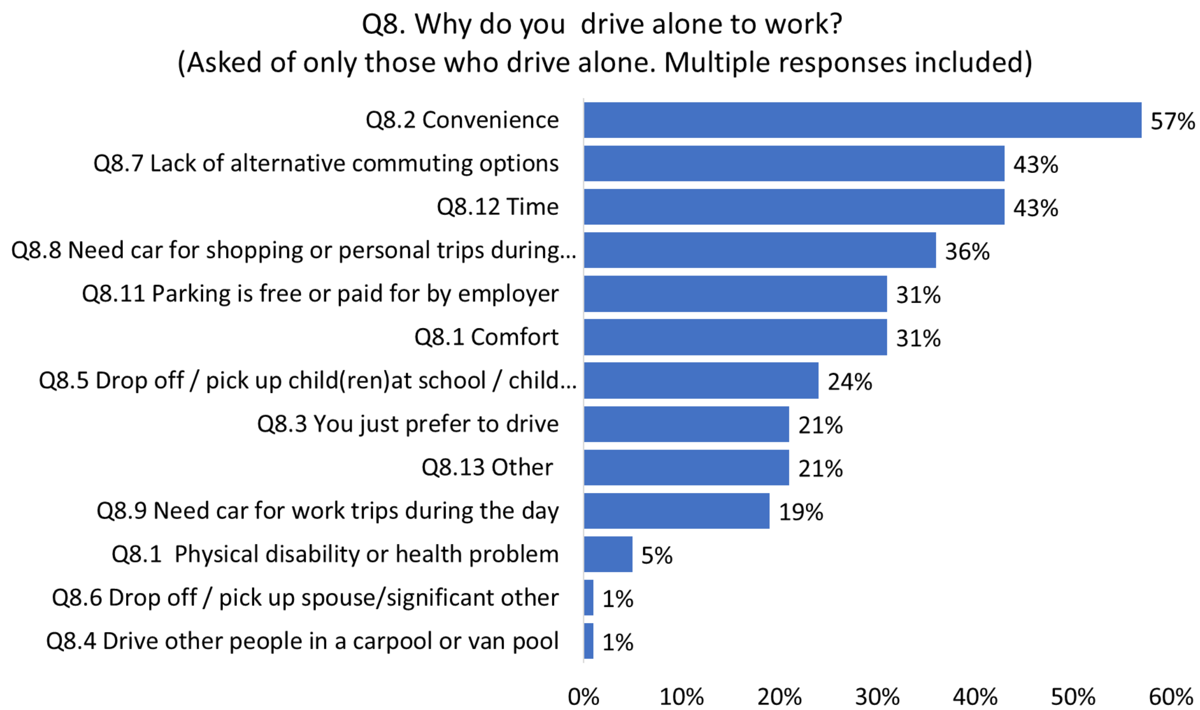
Figure 25 Usual commuting mode (short form)



In Figure 25 we simplify these categories by combining them. Thus, we see that, including park-and-ride, 18% use TheRide, while 22% get to work under their own power, walking or bicycling, and the balance either car or vanpool (6%) or use some type of mix of these modes.

The bottom line is that, at least of the survey respondents, more than half (58%) of downtown Ann Arbor commuters commute using an alternative mode of one type or another.

Figure 26 Reasons for which commuters drive alone



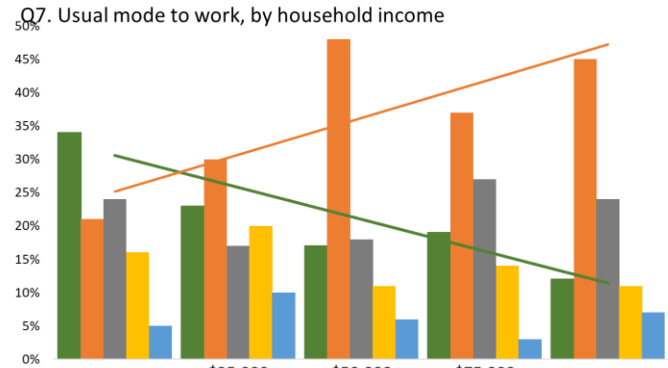
Reasons commuters give for driving alone to work

The reasons given for driving to work reveal that driving is not so much a calculated cost-benefit determination but a simple preference that does not take costs into consideration. This is illustrated by the fact that in this survey, as in in many such studies, the most common reason for which people say they drive alone to work, is "convenience." The next most common answer is that people feel they lack an alternative (43%), while another 43% said that any alternative would take too much time compared to driving.

Some commuters offer more concrete reasons. For example, 36% say that they have to make personal trips during the day or after work, while 4% say they must drop off or pick up a child at school or childcare, and 19% say the need the car to make work trips during the day. In all of those cases it is unlikely that they would be persuaded to use an alternative mode.

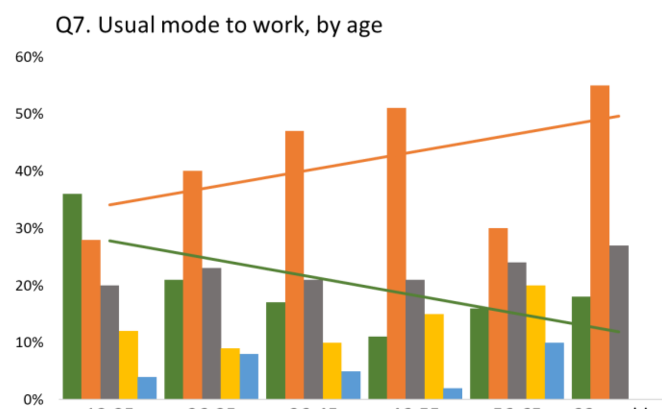
To some extent the tendency to drive to work is influenced by the employer. For example, 31% of the commuters say they drive because parking at work is free or paid by the employer, while another 19% say they drive because they must use their vehicle to make trips for work during the workday.

Figure 27 How usual mode varies with income



	Under $35,000	$35,000 to $49,999	$50,000 to $74,999	$75,000 to 99,000	$100,000 or more
Take the bus (incl park & ride)	34%	23%	17%	19%	12%
Drive alone	21%	30%	48%	37%	45%
Walk or bike all the way	24%	17%	18%	27%	24%
Use a mix, incl carpool,other	16%	20%	11%	14%	11%
Car/vanpool	5%	10%	6%	3%	7%

Figure 28 How usual mode varies with age



	18-25	26-35	36-45	46-55	56-65	66 or older
Take the bus (incl park & ride)	36%	21%	17%	11%	16%	18%
Drive alone	28%	40%	47%	51%	30%	55%
Walk or bike all the way	20%	23%	21%	21%	24%	27%
Use a mix, incl carpool,other	12%	9%	10%	15%	20%	0%
Car/vanpool	4%	8%	5%	2%	10%	0%

Household income and the usual commute mode

The tendency to drive alone to work is related to income. Those with household incomes of less than $35,000 per year are less likely than those with higher incomes to drive alone to work. Conversely, they are more likely to take the bus. These tendencies are illustrated by the linear regression trendlines. (Figure 27)

Those with incomes of $50,000 or more are distinctly more likely to drive alone to work than those with incomes below $50,000.

Use of TheRide to commute is the only trade-off between income and mode to work. The other modes are not consistently related to income level.

Age and the usual commute mode

The mode used to commute varies with age. (Figure 28) In general, a greater proportion of the younger than the older population uses public transportation. For example, as shown in the 2017 survey of TheRide's customers (not shown here), of all customers of TheRide, 53% are under the age of thirty. Among downtown commuters 18-25, 36%, commute by bus, a percent that tends to diminish with age.

Conversely, the percent who say they drive to work increases with each age cohort from 18 to 55. It then falls off for an unknown reason, perhaps having more to do with the nature of the sample, than with commuter behavior, before it rises again after the age of 65. But the overall tendency is for commuting by SOV to increase as age increases.

Chapter 5: Parking

Where commuters park

We saw earlier in Figure 22 that 42% of commuter respondents drive to work. Fifty percent (50%) of those commuters (i.e., 21% of all downtown commuters) say that they park in a paid parking structure, while another 9% say they park in a paid surface lot, and 4% use a parking meter. Another 26% Park in their employer's parking lot. Only 8% say that they park in an unmetered space on a residential street.

Prepayment v paying by the day for parking

Almost three fourths (74%) of commuters who drive to work and park in a paid location say they prepay for parking while the balance, 26% said they pay by the day.

Figure 29 Where commuters park

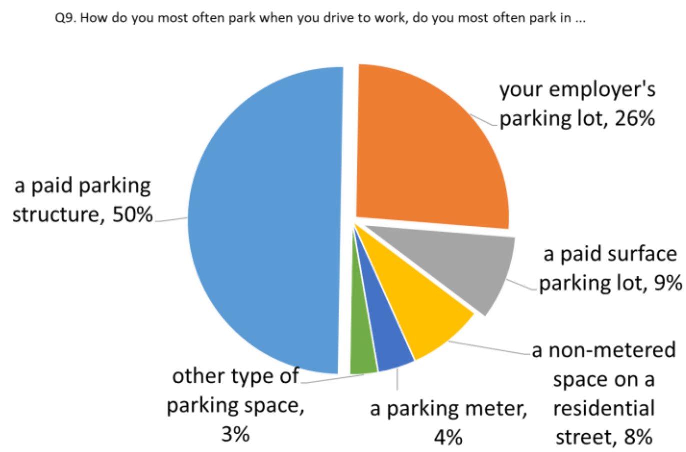


Figure 30 Is parking pre-paid or paid daily?

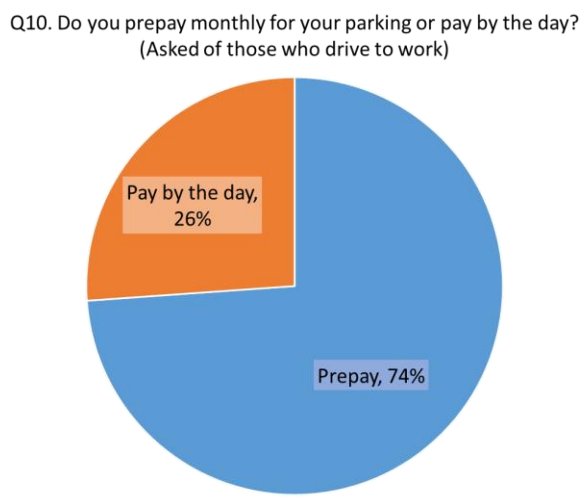
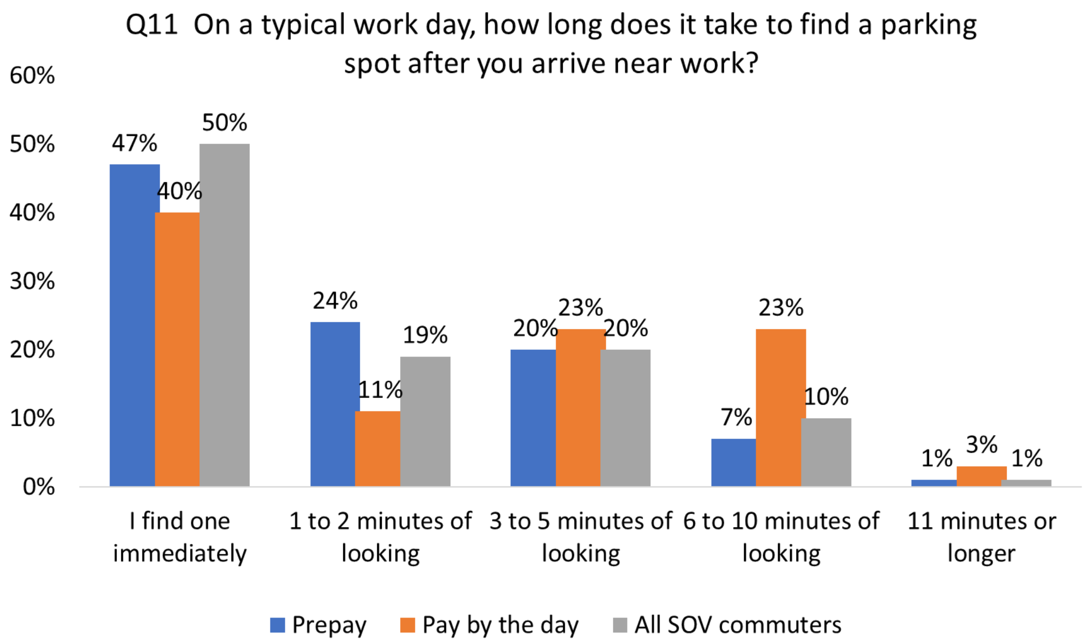


Figure 31 Time it takes drivers to find a place to park



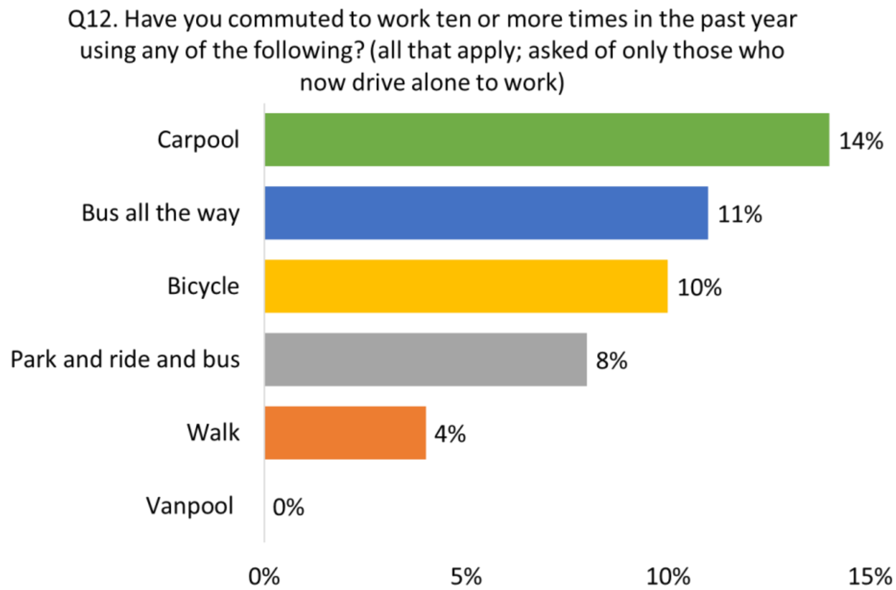
Finding a parking spot

Of those who drive to work, half, 50%, say they find parking immediately, while another 19% find a place to park within one or two minutes, and 20% within three to five minutes. Only 11% take longer than that.

Prepayment of parking fees reduces the time it takes to find parking. While 47% of those who prepay find a spot immediately, only 40% of those who pay by the day find one that quickly. Of course, prepayment essentially guarantees a parking spot, and in many cases, it may be a reserved spot that requires little or no searching. Of those who pay by the day, 23% say it takes them six to ten minutes while for those who prepay, only 7% say it takes that long.

Thus, 50% of the SOV commuter-respondents spend almost no time to find parking, and another 19% spend only a minute or two, for a total of 69% spending little or no time seeking a parking place. The balance, 31% spend three minutes or more presumably cruising and searching for parking, and unproductively contributing to downtown traffic congestion.

Figure 32 Use of alternative modes by SOV commuters



Using alternate modes

Those who drive alone to work were asked whether during the past year they had commuted ten or more times using one of several alternative modes. While most had not done so, 14% said that they had carpooled, 11% said they had taken the bus, 10% bicycled, 8% used park and ride to take the bus, and 4% walked.

Thus, while most SOV commuters had not used any alternative, a small but significant number had done so. From a marketing perspective, these are likely to be the commuters most susceptible to a longer-term conversion to an alternative mode, unless they face barriers that would prevent that change.

Figure 33 Have commuters changed the way they commute?

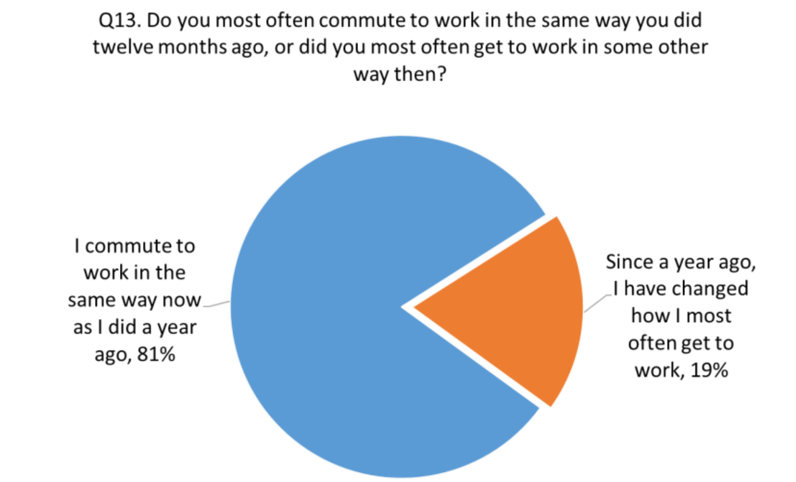
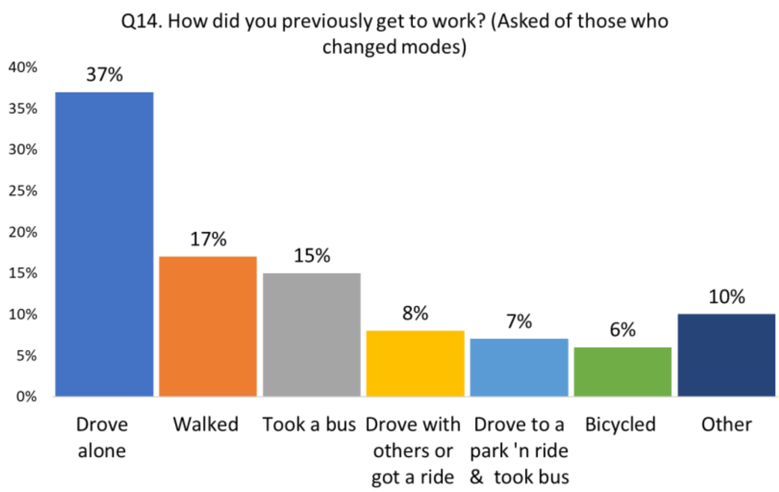


Figure 34 How did those who changed modes previously get to work?



- Only 72 respondents (19%) of 380 say they changed their commuting mode.
- Of these:
  - 32% Changed from SOV to an alt mode
  - 23% Changed from an alt mode to SOV
  - 46% Changed from one alt mode to another
- As a percent of all respondents, this means that:
  - 5% changed from SOV to alt mode
  - 4% changed from alt mode to SOV
  - 8% changed from one alt mode to another

Changing modes in the past twelve months

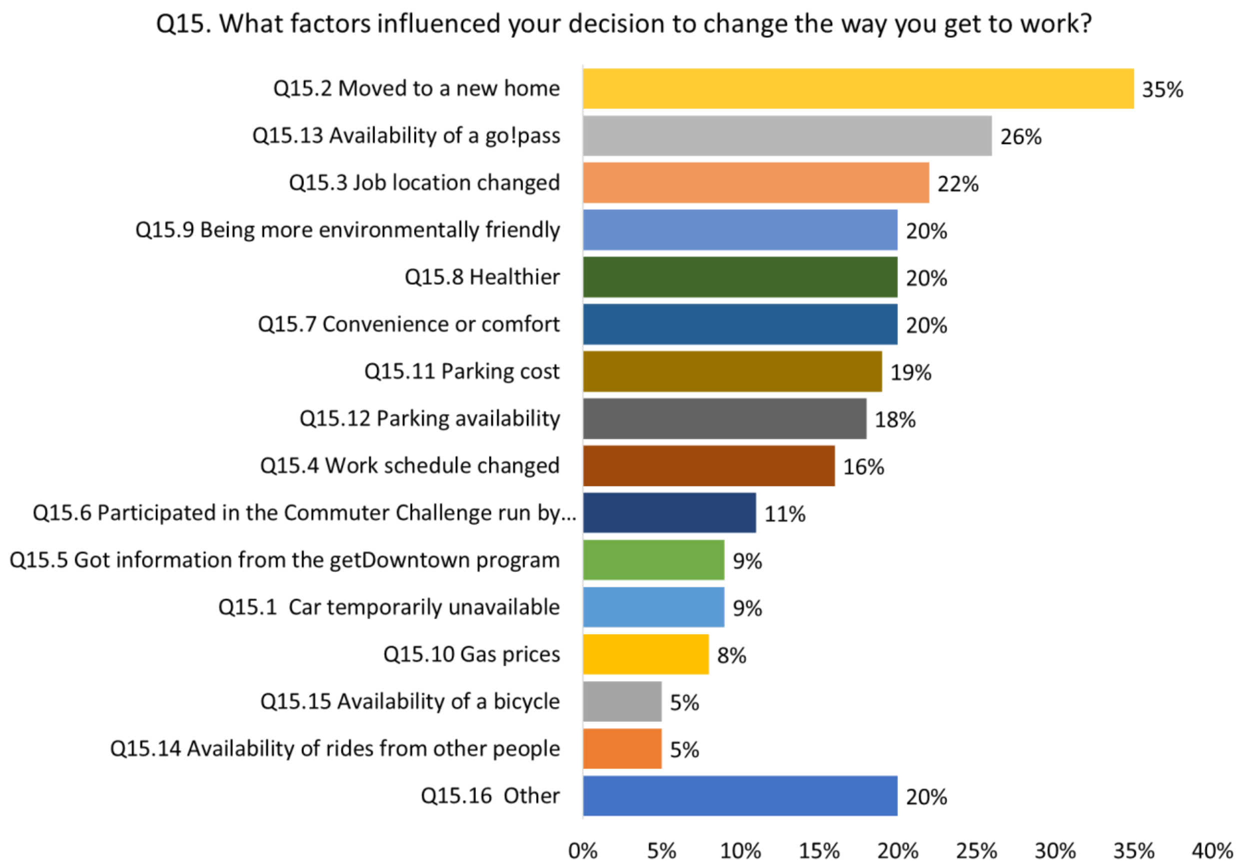
All respondents were asked whether they most often get to work now the way they did 12 months ago or whether that had changed. Nineteen percent (19%) said that they had indeed changed how they most often get to work, while 81% said that they continue to commute the way they did a year ago. (Figure 33)

Those who had changed how they get to work were asked which mode they had used previously. More than one third, 37%, said that they previously had driven alone. Almost two thirds (63%), however, had used an alternative mode of some type, including 17% who walked, and a total of 22% who either took a bus or drove to a park and ride and took a bus. (Figure 34)

Of the sample of 380 respondents, 72, or 19% say that they had changed their commuting mode. Of these, approximately one third, 32%, said that they changed from a single occupancy vehicle to an alternative mode of some type, while 23% indicated they had changed from an alternative mode to SOV. A plurality of 46% said they had simply changed from one alternative mode to another.

Converted to percentages of all respondents, this means that if, in fact, there was a gain in terms of conversion from SOV to alternative modes, it was extremely small (1%). Statistically the change is certainly not significant.

Figure 35 Factors influencing a change of mode



Factors influencing the decision to change the way commuters get to work

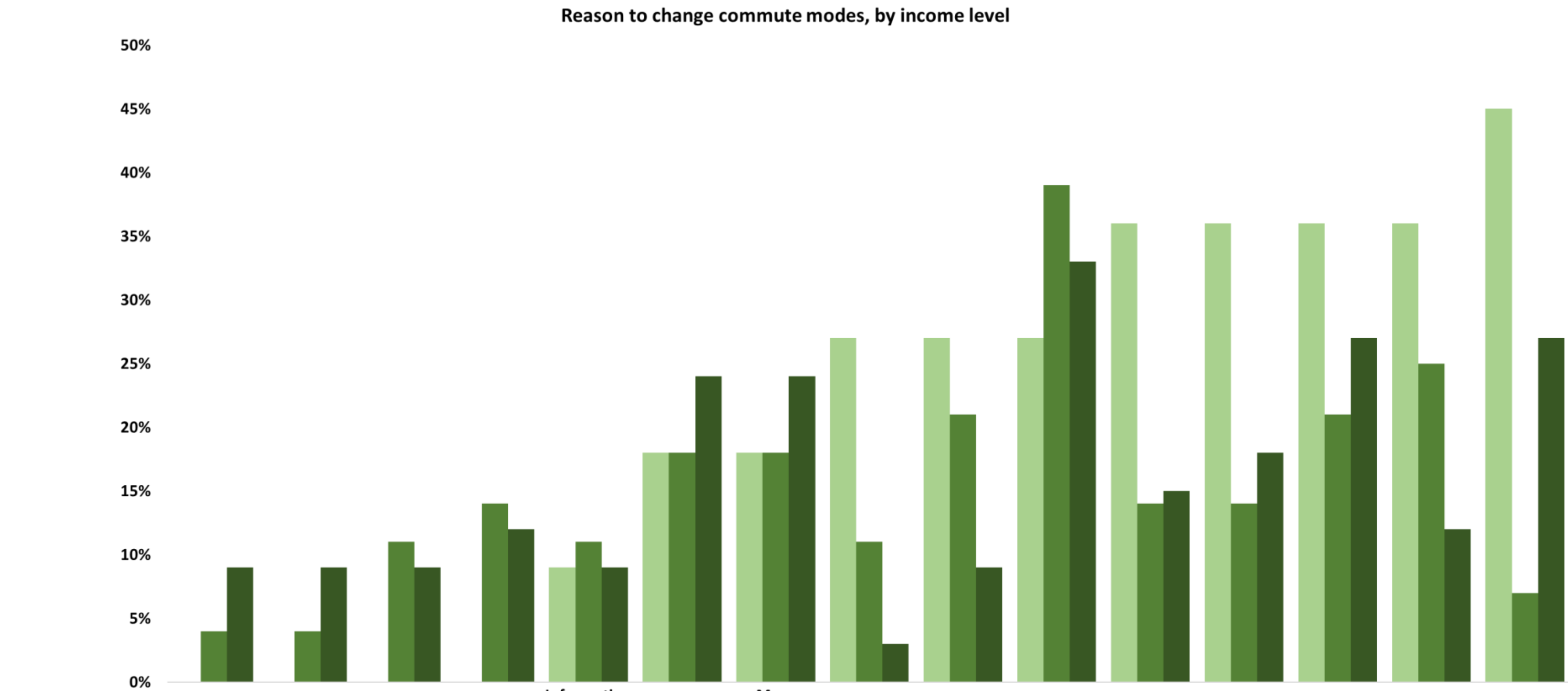
Why did some commuters change the way they get to work? More than one third, 35%, said that they had moved to a new home. In addition, 22% said that their job location had changed, while 16% said that their work schedule had changed. (Since multiple responses were allowed, these percentages cannot be summed.) It is clear that in many cases, external factors rather than a decision about a preferred mode had been a primary influence on the decision to change the nature of the commuting trip.

On the other hand, some respondents cited efforts of the getDowntown program as reasons for their change. Specifically, 26% cited availability of a go!pass, 11% said that they had participated in the Commuter Challenge, while 9% said that they had gotten information from the getDowntown program.

A few offered other reasons, as described in the adjacent list.

- A combination of carpooling and driving alone to work.
- Ability to carpool
- Bus in my neighborhood regularly runs late.
- Construction shut down my nearest bus stop on Pauline
- Do not feel safe biking while pregnant from my new home to my new job location on South State.
- Got my license
- Health problems or children schedule interferes with ability to catch the bus on time.
- I biked year-round every day for 15 years but it's now to dangerous to continue. I run instead. Even then, I dodge motorists in crosswalks every day!
- Injury
- Injury made it difficult to walk all the way to work.
- Partner started working in same city where I work so we can carpool
- Winter bike commuted for the first time this year.

Figure 36 Reasons for change of mode, by household income



	Availability of rides from others	Availability of a bicycle	Gas prices	Commuter Challenge	Information from getDown-town	Healthier	More environmentally friendly	Car temporarily unavailable	Work schedule changed	Moved to a new home	Parking availability	Parking cost	Availability of a go!pass	Convenience or comfort	Job location changed
Less than $25,000	0%	0%	0%	0%	9%	18%	18%	27%	27%	27%	36%	36%	36%	36%	45%
$25,000 to $74,999	4%	4%	11%	14%	11%	18%	18%	11%	21%	39%	14%	14%	21%	25%	7%
$75,000 or more	9%	9%	9%	12%	9%	24%	24%	3%	9%	33%	15%	18%	27%	12%	27%

Income and changing the way people commute

While the sub-sample of those who say they had changed the way they get to work is small, and the chart above is therefore not definitive, it is suggestive of the relationship of income to reasons for changing the ways in which people commute. Notice how income appears to be closely related to several of the reasons given for changing the nature of the commute. For example, lower income commuters are more likely to say they temporarily lacked a vehicle, that their work-schedule or job-location changed, that parking availability and/or cost was a problem, or to cite availability of the go!pass.

Figure 37 Variation among modes since switching modes

Q16. Since you started getting to work as you do now, have there been times when you have gone to or from work using a different one of those alternatives?

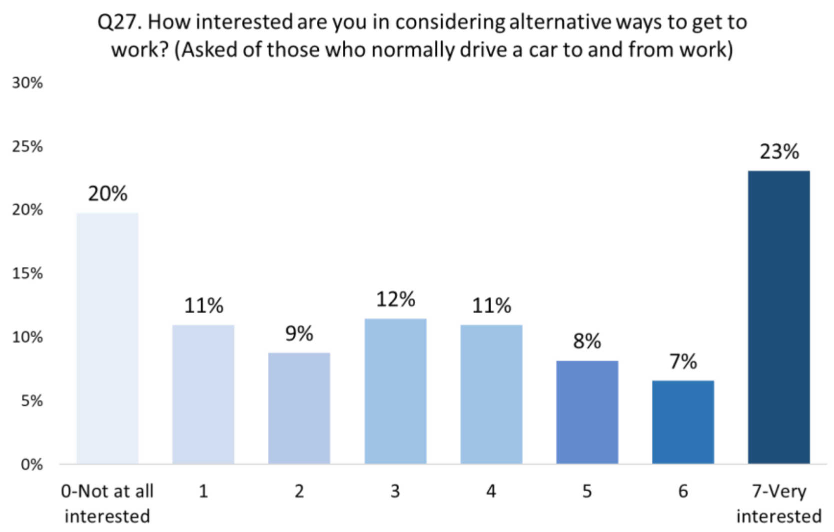
	As % of those changing modes	As % of all respondents
Used other modes also since changing modes?		
Yes	81%	14%
No	19%	3%
How often in a thirty day period have you used other modes since changing?		
Less than once	16%	3%
Roughtly two or three times	30%	5%
Roughly five or ten times	27%	4%
More than ten times	8%	1%

Multiple changes of commute mode

Only 19% of the commuters said that they had changed the way they get to work. This is a small subsample of 72 persons, and it is only suggestive, not definitive about tendencies among all downtown commuters. However, of that small sub-sample the overwhelming majority, 81%, said that they had not only changed their usual mode, but had used various other modes since making that change. This amounts to 14% of all downtown commuters who appear to be rather fluid in their choices of commuting modes.

What we learn from these charts and tables is that a substantial number of commuters (19%) have changed the manner in which they get to work. However, the movement to and away from alternative modes is roughly equivalent, a fact that means that the net effect is minimal. We also learn that of the 19% who made a change that many appear to use various modes over time such that whatever their initial switch of commute mode, it is not a one-time event.

Figure 38 Interest in considering alternative modes

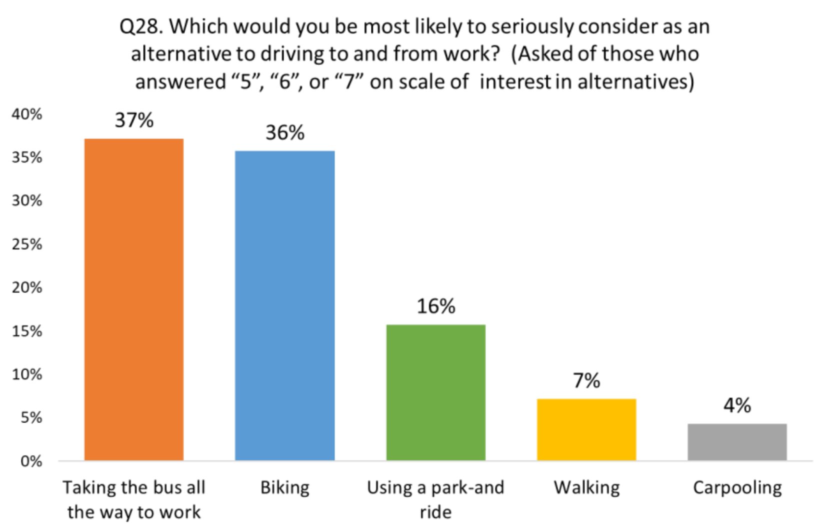


Level of interest in alternative modes

As an approximation of interest in using new modes for commuting, respondents who drive to work were asked simply "How interested are you in considering alternative ways to get to work?" They were asked to rate their interest on an eight-point scale (0 to 7) on which seven means "Very interested" and 0 means "Not at all interested."

Of those who drive to work, 23% indicated they are very interested by scoring their interest a seven, while another 7% scored it six and another 8% as five, for a total of more than one -third of current SOV commuters indicating interest in finding an alternative mode.

Figure 39 Which mode would commuters consider?



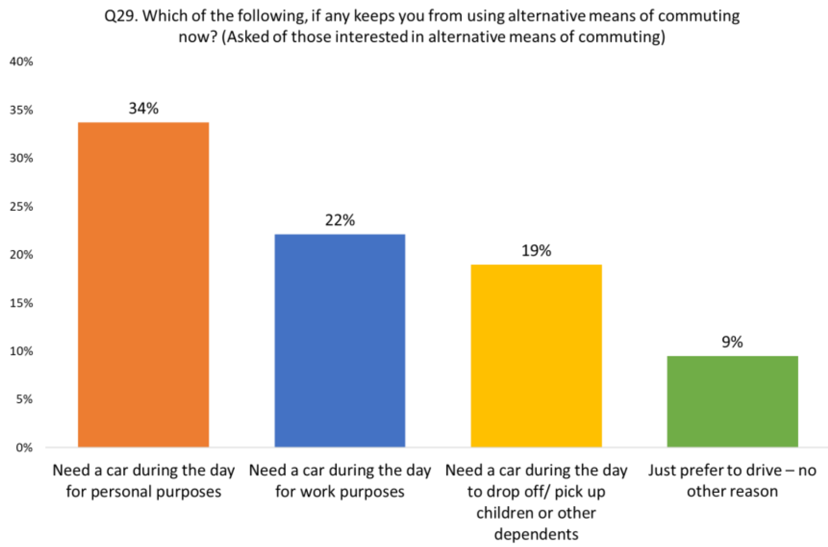
What alternative would commuters consider?

Those who indicated an interest in finding an alternative means of commuting were asked what mode they would be most likely to consider seriously.

More than one-third of this sub-set, 37%, which amounts to 14% of all responding commuters, indicated that TheRide would be their most likely alternative. Another 16% indicated they would be most likely to use TheRide from a park and ride lot. Thus, a total of 55% of the subset of those interested in alternatives, indicated that TheRide would be their most likely alternative. Thirty six percent (36%) indicated they would be most likely to bicycle, while 7% would probably walk, and 4% believe they would car-pool.

It certainly appears that there is a potential market for marketing the use of both TheRide, and bicycle facilities. The getDowntown programs focusing on these elements (go!pass and Commute Challenge, among others) are well targeted.

Figure 40 What prevents you from changing modes?

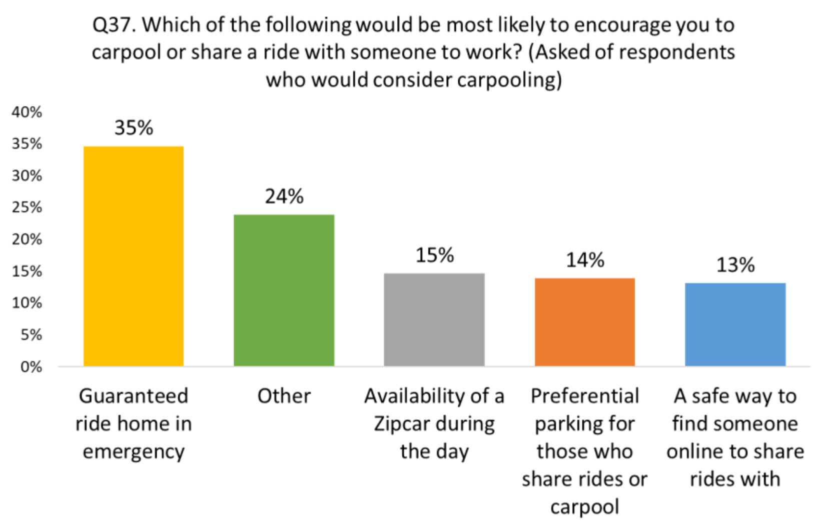


Barriers to using an alternative to the SOV

While SOV commuters frequently indicate an interest in using alternative modes, barriers, both perceived and real, interfere.

The most common barrier (34%) is the perceived need to use the car for personal purposes during the workday. Another 22% say they need their own vehicles for work purposes, 19% say they have to ferry dependents, and 9% are frank enough to admit that they simply prefer to drive.

Figure 41 What would encourage an SOV commute to carpool?



Reducing barriers to carpooling

What would reduce the perceived and real barriers? More than one-third (35%) say that a guaranteed ride home would provide a solution. The problem with this response is that a guaranteed ride program already exists. Moreover, Uber and Lyft would be available to many of these commuters. Yet they still drive alone to work. Perhaps they are unaware of the program? Perhaps it is too cumbersome? Or perhaps this is merely an excuse. Other solutions include having a Zipcar available for work or other purposes during the workday (15%), preferential parking for carpools (14%) and a safe way to find a match for a carpool. Another 24% gave open-end answers shown in the table below. Most of these responses were reiterations and elaborations of the multiple-choice responses they also gave, including needing the car after work, and needing a guaranteed ride home.

Some commuters indicated that more flexible hours would help in this respect. However, flexible hours are not conducive to carpooling because the hours are likely to vary among potential pool participants.

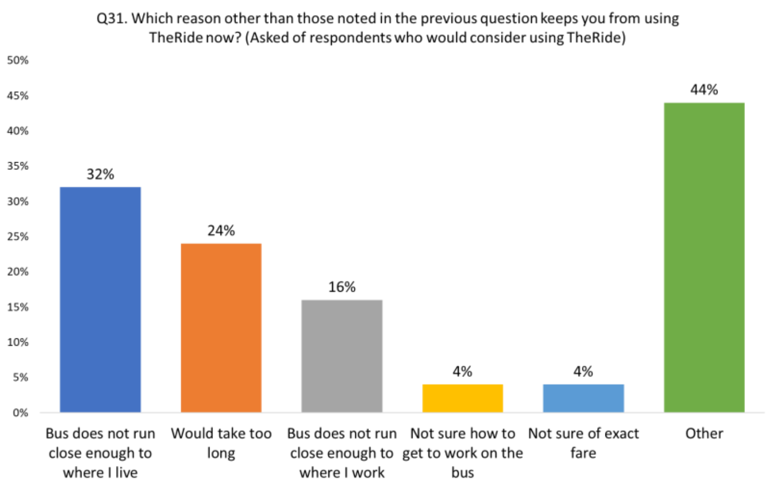
Figure 42 What other (open end) changes would encourage SOV commuters to carpool?

Other - Realistically, which one of the following would be most likely to encourage you to carpool or share a ride with someone else to get to work?
Not really feasible since I need a car after work.
My commute is too short to consider carpooling.
Financial incentive
Cash incentive
Financial Incentive
Pay me
Flexible/ variable schedule
Flex start time at work, I worry too much about being late when I have carpooled
Flexibility of a ride home whenever
Flexible schedule
I have a 50/50 situitation where I need to make sure an emergency ride could be availiable and the person I am carpooling with has flexible hours as mine can change sometimes
my schedule varies too much--need public transportation somehow to handle flex-hours.
Not being around other people
I can guarantee no one wants to carpool with me, unless they lack a sense of smell
Not being forced to engage in small talk
Living closer to coworkers or someone with similar schedule
Fixed schedule
If it was someone I knew who was near me
Living closer to co-workers who would be willing to carpool
Not needed. I have a colleague who lives near me
Someone who lives by me and works the same hours
Someone working the same hours of swing shift.
Ability to leave at any time
Guaranteed ride home in case of immediate circumstances (not necessarily emergency, but possibly a ride home if sick, have other pressing/unexpected matters.)
That I could get back to my car stat if there was an emergency and I needed to leave work to go to the carpool parking lot
That I could take the car during the day and leave them behind whenever I needed to
Reliability
Reliability. I hate counting on other people
The ability to schedule the carpool in advance, and ensure timeliness and reliability. I do not drive personally, so would just be a rider. Would also need to be cheaper than Uber or free.
Speed

(List continued on following page)

Availability for emergencies/ urgent situations
a way to get back home in the middle of the day in case of emergencies (child needs to go home from school / illness, etc)
They would have to accommodate emergency, personal errands, etc.
Would need to have a car at my beck and call to go to work most days, but also be no penalty if I didn't (eg, van pool left short of a driver) and would also be able to ferry me from work to step-kids' in Ypsi, then to music lessons, then drop off the kids, then bring me back to wherever my car was (no; there is not time between getting out of work to catch a bus... you'd need a personal shuttle waiting outside the door of the building where I work). And during the day, it would need to be able to bring me to various appointments throughout Ann Arbor and surrounding areas. In short, I think I would need to have a different life.
Add train/ subway
Give me a train or subway
Train to/from Detroit
Comfort of bus stops
Seats at smaller bus stops
Make bus stops more protected from the weather. Small tax abatement for those who carpool
Seating at bus stops. Some stops are a significant distance from each other or home points and most don't have any kind of seating. For someone with a disability that makes standing for extended periods difficult, especially when tired, not having even a bench to sit is a large discouraging factor.
Snow removal and better bus shelters
Miscellaneous
Fix Liberty Plaza
Have a park and ride that I could get out of my car and immediately zip to the BTC.
Have more celebrations
Honestly to make commuting easier Ann Arbor is going to have to look at infrastructure. The highways and streets were designed for a smaller community and Ann Arbor has just grown to big.
I need to be able to pick up my child after school.
I use TheRide Occasionally or take an Uber. TheRide takes too long, typically which is why I prefer an Uber.
It would be nice to commute with others, but I would have to rely on them to be responsible for getting to work on time. Overall it is frustrating having to wait on others for carpooling, it takes up time. Overall I prefer to drive alone because I can get to work on time. Also the times I do carpool with friends getting to work takes longer, which does not help when dealing with a long commute.
Make it available to me
Make it wither free or on time. For the bus.
More frequent access to my vehicle. Suggestions: ArborBike stations at commuter lots, partially subsidized Uber/Lyft rides, smaller shuttle vans for when regular bus routes don't service commuter lots
Move my apartment closer to my office
My biggest challenge is physical, so there isn't much the City can do
Provide a system to match riders with schedules, home and work addresses. I am trying to use the Rideshare website and there is no matches for me... why?
Right now you guys can't help because of my child care situation. In a year, when both of my kids are in AAPS, you can help by maintaining/increasing reliability so that I can be assured of picking up my kids on time. Children in K-3 MUST be picked up at dismissal by an authorized person (argh!). Can't risk getting sent to the principal's office, not joking, if I'm late because of bus delays.

Figure 43 Factors that those with some interest in using TheRide say would keep them from doing so



Barriers to using TheRide

Those SOV commuters who would consider using TheRide, were asked what keeps them from doing so now. Only twenty-five respondents met the criteria to be asked this question. This means that the percentages shown in Figure 43 are based on a subsample too small to small to provide definitive answers. However, they are suggestive.

The most frequent specific comment (8 respondents or 32%) was that the bus "…does not run close enough to where I live." Another 16% (4 respondents) indicated it does not go close enough to where they work. Almost one-fourth, 24% (6 respondents) said that the bus would take too long, and 4% (one respondent) said that they were unsure of the fare and another 4% of how to get to work on the bus. Eleven respondents cited other barriers shown in Figure 44 below. The problem cited by four respondents involved the hours of service.

Figure 44 Other factors that would keep commuters from using TheRide

Bus does not run early enough for start time
Bus doesn't run early enough
Bus doesn't run early or often enough
Bus return times do not start running early enough in the afternoon
Combination--bus does not run close enough plus physical disability
I do take the bus often
Infrequent service
No sidewalks between home and nearest bus, 1 mile away.
Poor Saturday/Sunday service
Sometimes have to carry a lot of things and busing would make this difficult
Weather - too hot, cold, rainy

Barriers to using a park and ride

Figure 45 Reasons not to use a Park & Ride

Needs car while at work

Need a car during the day for work purposes

Need a car during the day for personal purposes

Need a car during the day to drop off/ pick up children or other dependents

Not sure how to use a park and ride

Not sure how to get to work on the bus from the park and ride

Not sure where the park and ride is

The lot usually appears full

Buses not running when needed

I work late and if I miss the last bus I'm screwed. I don't have 100% control over when I'm done, and it's too scary to take the risk

Buses are not running when I would need them

Adding time/ timing

Timing

No current park and ride saves me any time--it adds a half-hour to an already painful hour-long commute

Would take too long

Other

I am moving and need to learn the routes from Ypsi to Ann Arbor.

Location not convenient

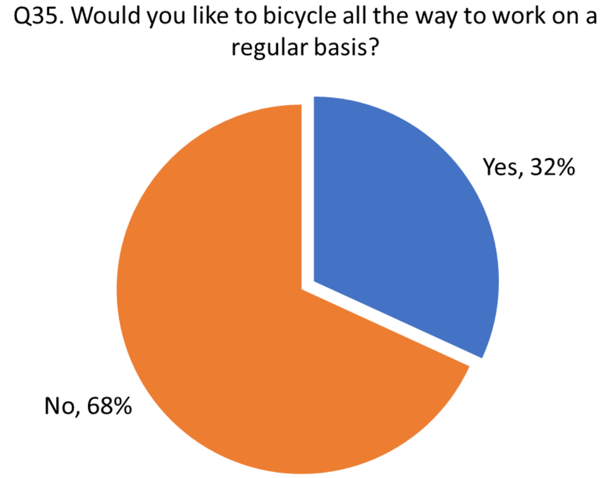
Bus service not available

Only eleven respondents met the criteria to be asked what kept them from using a park and ride, given that they had expressed some interest in doing so. Because the subset is so small, percentages are not used here, but instead the fourteen separate answers given by the eleven respondents (multiple responses allowed) are shown in the table.

Needing the car during the workday was the most frequent response. Nationally we find this reason to be the most common reason (or excuse) not to use transit (including park & ride) in spite of some temptation to do so. Some people are uncertain about how to use it, while others are concerned about the added time it takes once they are already driving, or are concerned about the lack of bus service when they would need it.

There is no dominant answer to the question of why those who are somewhat interested in using a park and ride are not doing so already.

Figure 46 Interest in bicycling to work



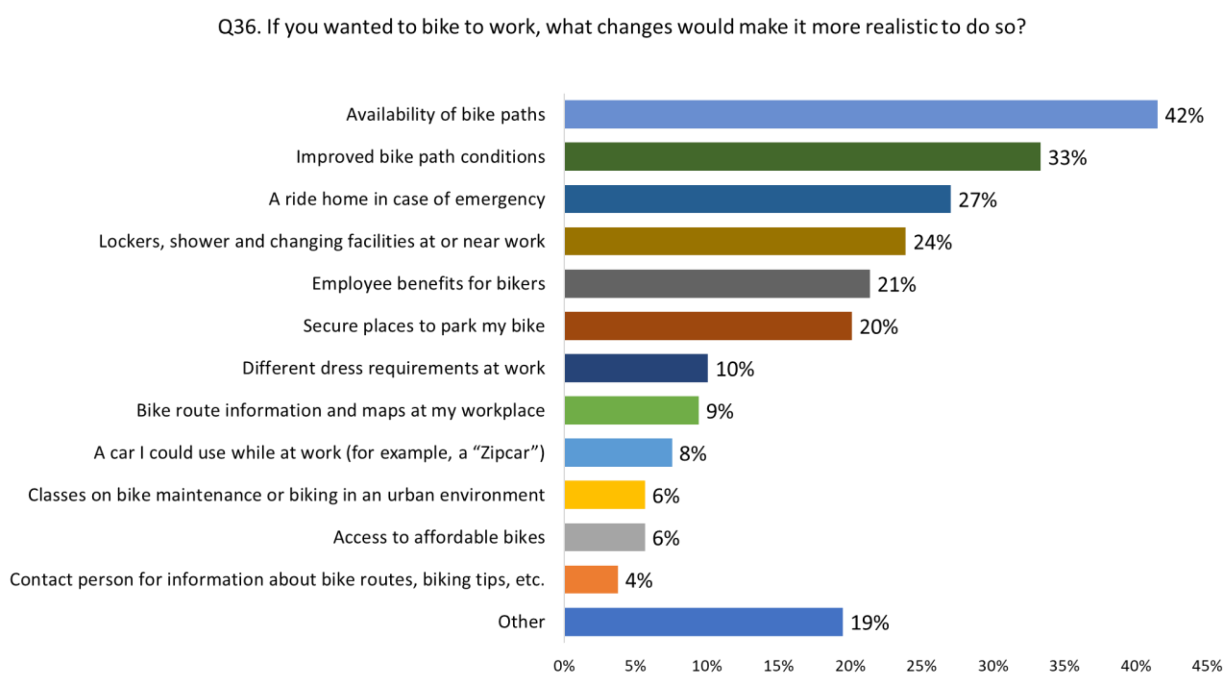
Bicycling to work

Those respondents who now drive to work but have some interest in using an alternative mode (157 respondents) were asked if they would like to bicycle all the way to work? The term "all the way" was used to avoid a bicycle response among those who might ride to a bus stop and take TheRide, a response which would be included in use of TheRide, not a bike.

Almost one-third of the eligible respondents said they would like to bicycle to work although they do not do so now. What, then, would make bicycling more feasible for them? Figure 47 provides many of their responses to that question.

The key is the infrastructure of bicycling paths. That this is the case nationally is clear in transportation blogs and other literature. Isolating bikes from traffic is generally the key, but the condition of the paths and on-street routes is also a concern of many. Facilities (lockers, changing space, etc.) are also of concern, but less so.

Figure 47 What would make biking to work more feasible?



Besides the items mentioned above, there is a further set of desires for biking shown in Figure 48 on the following page. Many items mentioned in that table involve factors beyond the control of policy choices available to authorities. They include primarily the proximity of the commuters to their jobs and the weather.

Figure 48 "Other" factors that would make biking to work more feasible

Shorter distance
Distance
Distance (35 miles)
Distance shorter than 25 miles
Biking 40 miles a day is crazy if you're not a professional bicyclist
I do plan to move closer so I can bike to work.
I wish I could bike, but I live over 20 miles away from work.
i would have to move closer
I would have to move closer to work
I would need to not live 40 minutes away...
I'd need to live closer
Live to far away
Living closer to work
move closer to work
Not feasible as 50 miles round trip. I am a long distance rider so do 50 mile bike rides just not practical to do daily plus know no safe roads to easily do so from Novi.
Seriously, it would take me ~4hours ONE WAY. My entire work day would consist of 4 hours riding in, then turning around to ride another 4 hours back.
Weather
A cure for winter? (kidding)
Contol the weather
Cooperative weather
Weather
Winter maintenance of sidewalks and bike paths. Finish the border-to-border trail and maintain it in the winter.
Physical strain
A better level of fitness/ time
If I didn't (need to) go to the gym on top of that.
Safety/ road conditions
Fix the roads
Most streets aren't wide enough for bikes and vehicles
Safer conditions for bikes on AA streets
That it was safe. I perceive driving is safer
There is no way I would ride a bike on streets with cars no matter how wide the bike lanes are made. If it was a bike only path from my house to downtown I would.
Cars around here are not safe around bicylists, so I refuse to ride in the road with them.
Zero tolerance of phone use while driving combined with increased enforcement of traffic laws

Chapter 7 - The go!pass

Figure 49 Being offered a go!pass

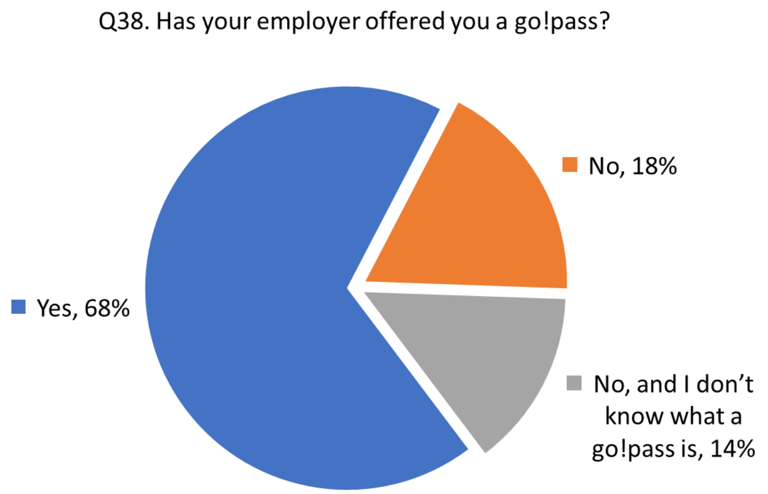
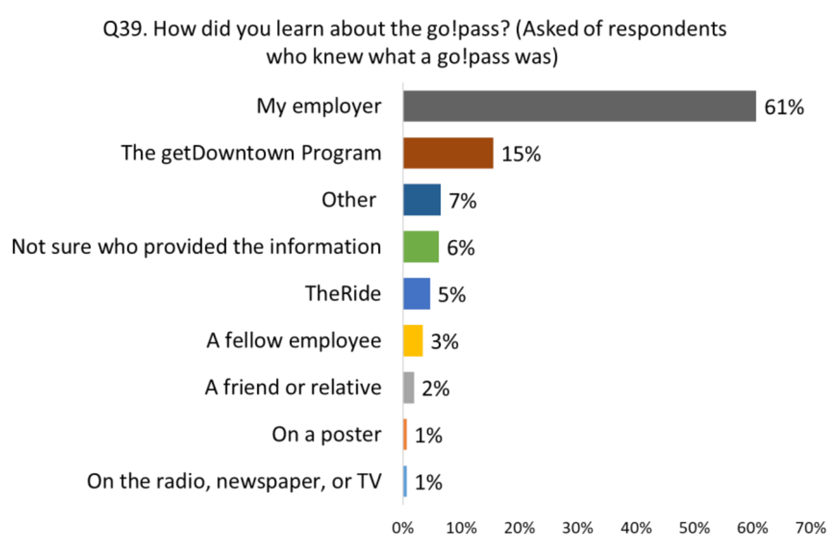


Figure 50 How respondents learned about go!pass



Being offered a go!pass

More than two-thirds of the commuter-respondents (68%) say that their employers offered them a go!pass, while 18% said they had not been offered one, and 14% said not only had it not been offered to them, but they did not know what a go!pass is.

Those who know what a go!pass is were asked how they had learned about it. By far the most frequent answer was that they had learned about it from their employers (61%), not surprising since the go!pass is employer-distributed.

Some, 15%, credit getDowntown directly rather than the employer, while others learned about the go!pass in other ways.

Others had a variety of comments shown in Figure 51 on the following page, the most common of which is that the commuter has a University of Michigan ID which functions in the same manner as a go!pass.

Figure 51 Comments about learning of go!pass

- Don't need it. UM Employees get better than go!pass
- Employer - however, as I work in Ypsilanti, are not eligible
- Employer, internet, TheRide
- Former employer
- Had one at a former employer
- I don't know whether UM's arrangement is considered a go! pass or not - but it's wonderful
- I have a go pass
- I have a UMID, not a go!pass
- I used to get one at my previous employers
- My own research
- My past employer (city of Ann Arbor)
- Not a go!pass but a UMID
- Offered at a previous job
- Our business is just north of Kerrytown and we can not get go!passes
- Previous employer
- Previous job
- UM employee
- UM ID is my pass
- UM ID works as a go!pass
- Used while at past employer
- When I signed my lease downtown

Terms of employment and being offered a go!pass

There is no difference between full and part time employees in terms of having been offered a go!pass.

There is, however, some difference in being offered a go!pass depending on the number of days an employee commutes. Of those who commute six or seven days, 88% say they were offered a go!pass, compared to 70% of those who commute five days and 64% of those who commute less often. In other words while two-thirds or more of all commuters are offered a go!pass, those who commute most often are more likely than others to be offered one.

Figure 52 Being offered a go!pass, by full/part time job

Has your employer offered you a go!pass? By full and part time work schedule

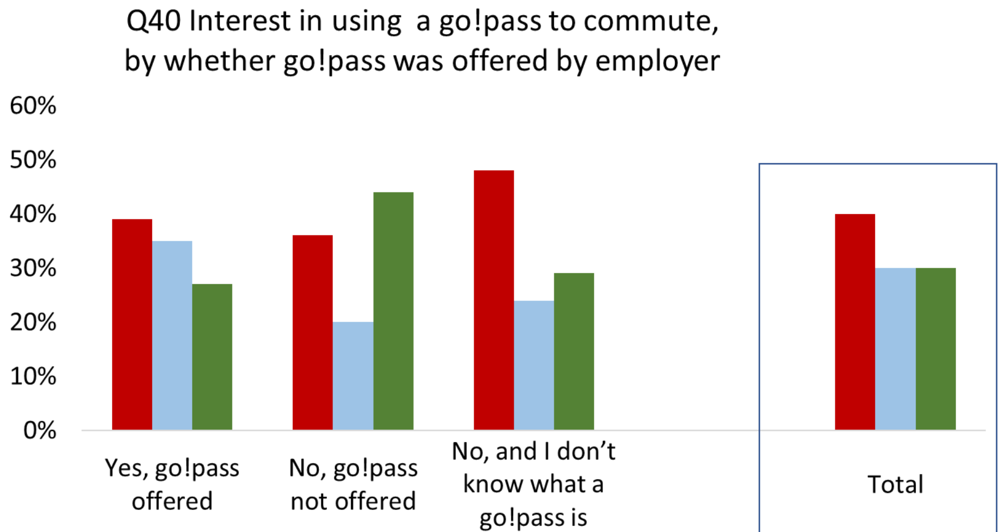
	Full Time	Part Time
Yes	68%	67%
No	18%	19%
No, and I don't know what a go!pass is	14%	15%

Figure 53 Being offered a go!pass, by frequency of commuting downtown

Has your employer offered you a go!pass? By number of days commuting to downtown Ann Arbor

	One to four days	Five days	Six or seven days
Yes - Offerred a go!pass	64%	70%	88%
No - Did not offer a go!p	19%	18%	6%
No, and I don't know what a go!pass is	17%	12%	6%

Figure 54 Interest expressed in using go!pass, by whether employer offered it



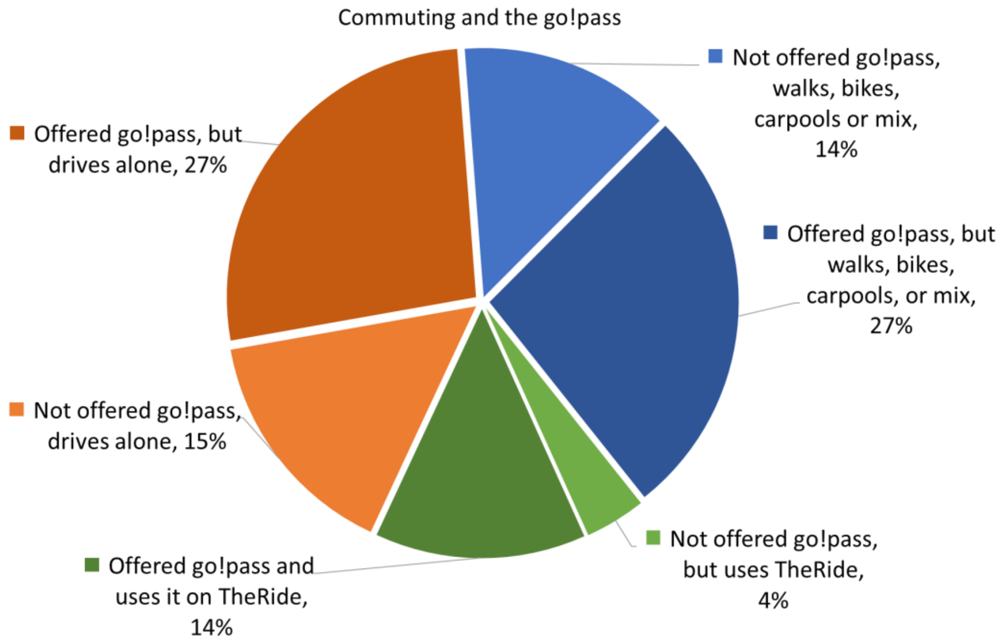
	Yes, go!pass offered	No, go!pass not offered	No, and I don't know what a go!pass is	Total
No interest	39%	36%	48%	40%
Neutral	35%	20%	24%	30%
Positive interest	27%	44%	29%	30%

Interest in using go!pass to commute

While 40% of all respondents ("Total" in figure above) respondents say they have no interest in using a go!pass to commute, 30% are interested. The other 30% are neutral on this matter.

Of those who were offered a go!pass, 27% say they are interested in using it to commute. Of those not offered a go!pass, 44% said they would be interested in one. This suggests that there may be some untapped market for commuting by go!pass, assuming that those who were not offered one would have been eligible.

Figure 55 Commuting and the offer of a go!pass



The go!pass and commute mode

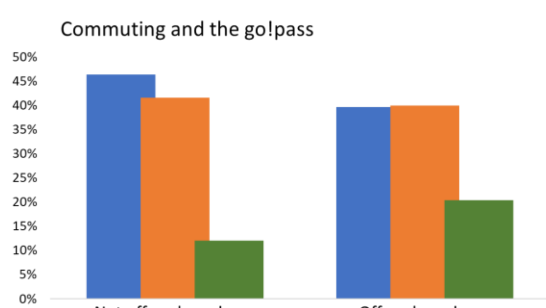
Taking the commuter sample as a whole, we can see the complex relationship between the go!pass and downtown commuting. The segments include:

- 14% were offered a go!pass and commute on TheRide
- 4% were not offered a go!pass but commute on TheRide anyway

- 27% were offered a go!pass, but walk, bike, carpool, or use a mix of these
- 14% were not offered a go!pass and walk, bike, carpool or use a mix

- 27% were offered a go!pass, but drive alone
- 15% were not offered a go!pass and drive alone

Figure 56 Commute mode and the go!pass

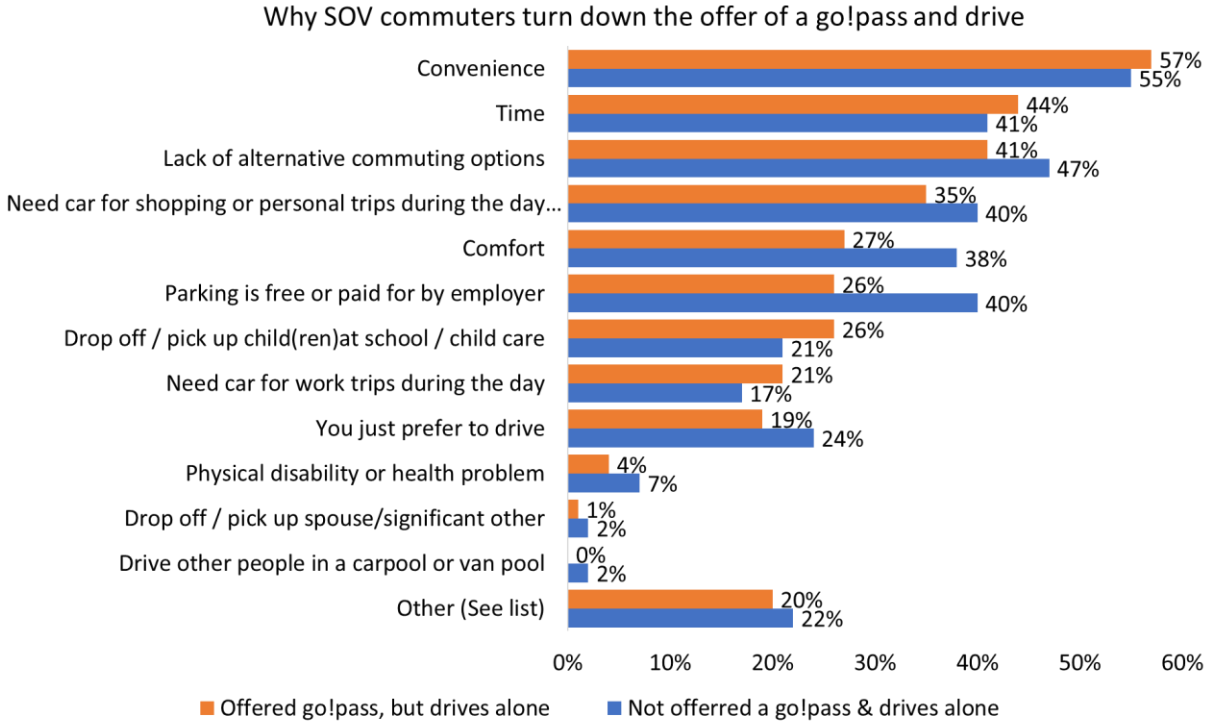


	Not offered a go!pass	Offered a go!pass
Drives alone	46%	40%
Walks, bikes carpools, mix	42%	40%
Uses TheRide	12%	20%

Impact of the go!pass

Use of TheRide is associated with a greater incidence of having been offered a go!pass. Of those who were offered a go!pass, 20% use TheRide to commute compared to only 12% of those not offered a go!pass.

Figure 57 Offered a go!pass or not, these SOV commuters give these reasons for continuing to drive



Why do SOV commuters drive alone?

All SOV drivers were asked why they drive. Most SOV commuters were offered a go!pass, but most continue to drive. Free transportation was insufficient to motivate them to make a mode change. Figure 57 splits the SOV commuters into those who were offered a go!pass and those who were not.

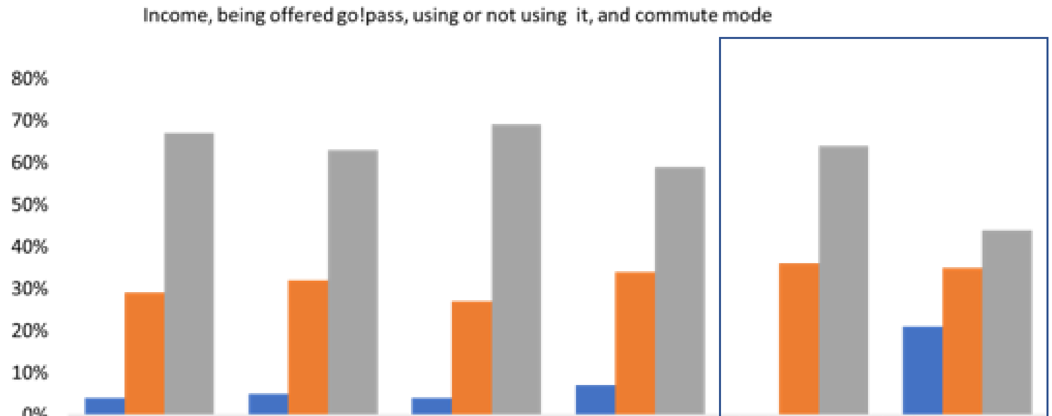
There are many similarities in the responses of the two groups. Most drivers, whether or not they were offered a go!pass, say it is the relative convenience of driving that motivates them to drive. Similar percentages of both groups say that the time it would take by bus compared to driving is the main reason.

There are some differences. Those not offered a go!pass are more likely (40%) than those who were offered one (26%) to give the fact that their parking is free or paid by the employer as a reason to drive. Perhaps providing free or paid parking is associated with not offering a go!pass.

Those SOV commuters not offered a go!pass are also more likely to cite “comfort” as a reason to drive, although there would seem to be no simple explanation for this tendency.

Only two items in this list of barriers are elements that local employers can influence. They are free parking at the worksite and use of a vehicle for work-related purposes. Each of these could potentially be controlled by an employer, while the other listed barriers could not.

Figure 58 How income relates to use of go!pass to commute



	Go!pass not offered; drives alone	Go!pass offered, but drives alone	Go!pass not offered; walks, bikes or carpools	Go!pass offered, but walks, bikes, or carpools	Go!pass not offered but uses TheRide anyway	Go!pass offered and used on TheRide
Less than $25,000	4%	5%	4%	7%	0%	21%
$25,000 to $74,999	29%	32%	27%	34%	36%	35%
$75,000 or more	67%	63%	69%	59%	64%	44%

Income and use of the go!pass

Whether or not commuters use the go!pass to commute depends in part on their income. Of those offered a go!pass who use it to commute, 21% report incomes under $25,000, compared to the average for all commuters of 7% in that income range. On the other hand, no commuters (0%) of those who were not offered a go!pass, but use TheRide anyway fall into that lower income category. These are the riders by choice who have the resources to drive but choose not to for reasons of economy, environment, convenience., or other factors.

Chapter 8: getDowntown: Awareness, Utilization, Participation

Figure 59 Awareness of the getDowntown program

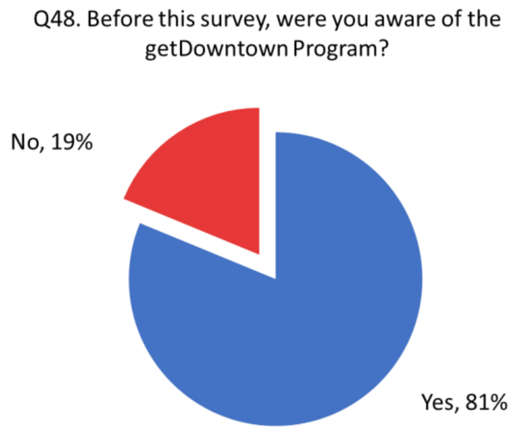
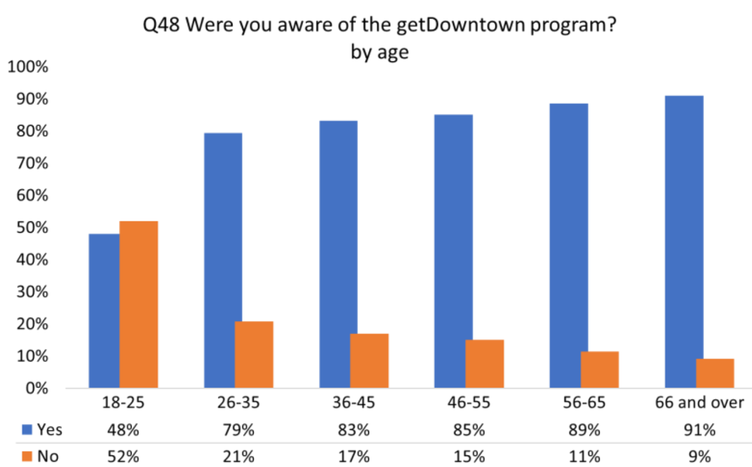


Figure 60 Awareness of getDowtown, by age



Awareness of getDowntown

For a low-key local organization, getDowntown has an enviable level of awareness among its target market at 81%. Only 19% indicated that prior to the survey they have been unaware of it.

Awareness is associated with the age of the commuter. It is widely understood that younger persons tend to be less aware of and involved with public institutions.

This holds true for awareness of getDowntown among the very youngest of the commuters, 18-25 among whom only 48% indicated awareness of the organization compared to 81% of commuters in general.

This lack of awareness among the youngest commuters is not a long-term problem because, to judge by the 79% awareness level among the next oldest age group (26-35) most commuters quickly become aware of getDowntown and the age a bit.

Figure 61 Use of getDowntown services

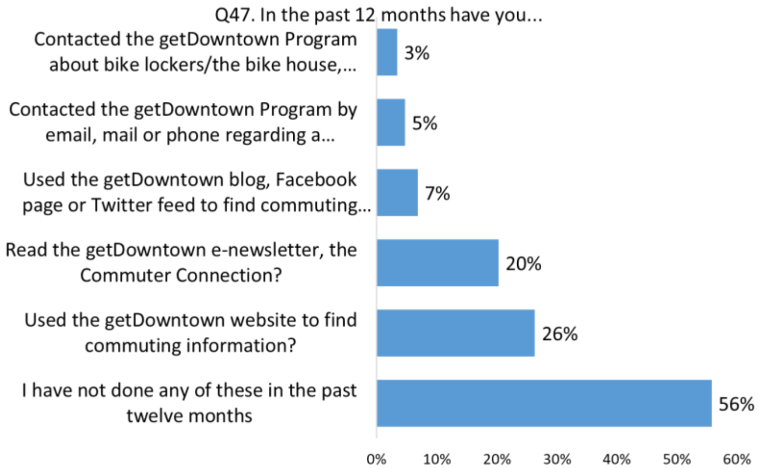


Figure 62 Awareness of the Commuter Challenge

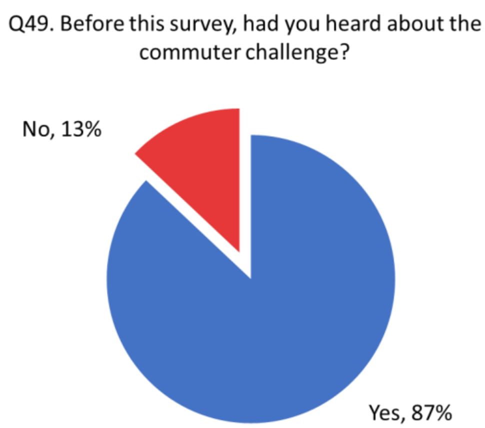
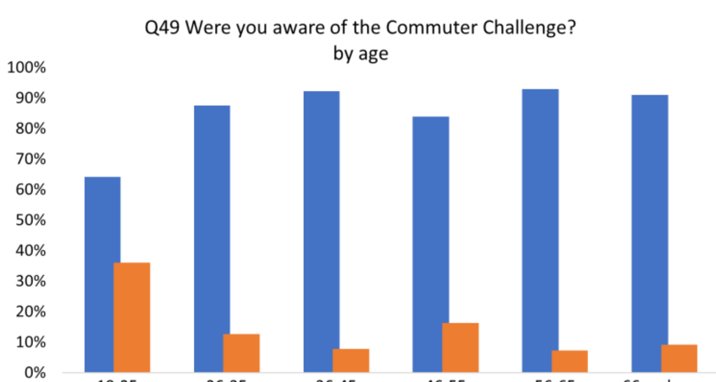


Figure 63 Age and awareness of the Commuter Challenge



	18-25	26-35	36-45	46-55	56-65	66 and over
Yes	64%	87%	92%	84%	93%	91%
No	36%	13%	8%	16%	7%	9%

Use of getDowntown services

Given that getDowntown provides more services than just the go!pass, respondents were asked what other getDowntown services they used. While more than half of the commuters said they have not used any of these services in the past twelve months, 44% have used them. (Figure 61)

Services used most often are the website for accessing commuting information (26%) and the news letter (20%).

Commuter Challenge

The Commuter Challenge has been well publicized, with the result that 87% of the respondents were aware of it prior to the survey. (Figure 62)

As with awareness of getDowntown itself, awareness of the Commuter Challenge varies with age, with the youngest commuters being less likely than others to be aware. However, the difference is only relative. Even the youngest group tends to be aware of the Commuter Challenge, with 64% indicating awareness. ()

Figure 64 Participation in the Commuter Challenge, by current mode

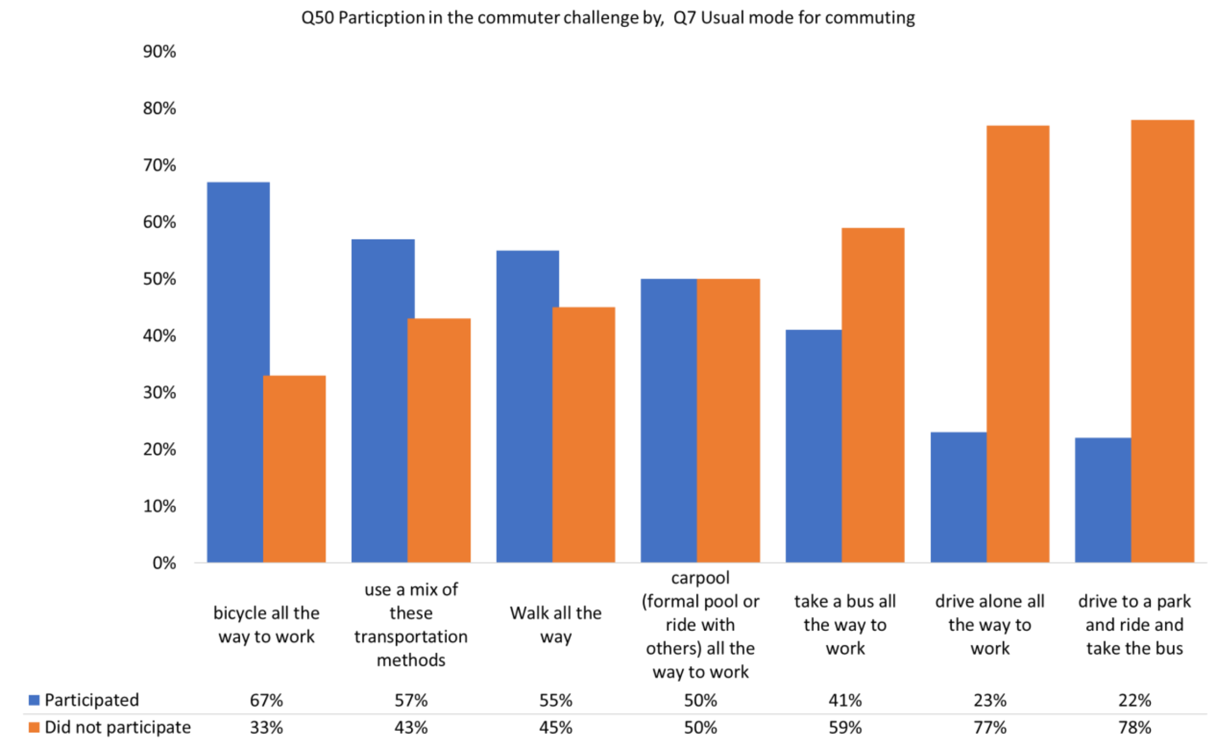
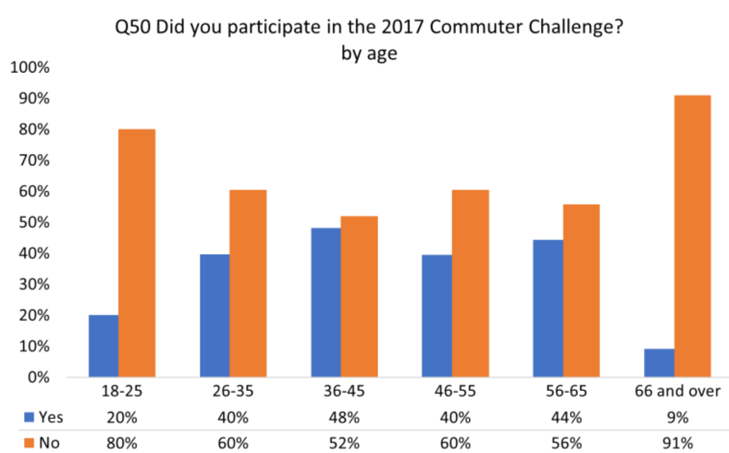


Figure 65 Participation in Commuter Challenge, by age



Participation in the Commuter Challenge

Participation in the commuter challenge is closely related to both current commuting mode and age of the commuter.

In Figure 64, we can see that participation is highest among those who bike (67%) or walk (55%) to work or use a mix of modes (57%), and lowest among those who drive. In addition, as Figure 65 demonstrates, the tendency to participate is also, not surprisingly, associated with the age of the commuter. The youngest age cohorts are the most likely to participate.

Part 2 - Decision Maker Survey

Chapter 1: Respondent Profile

Figure 66 Duration of downtown Ann Arbor location

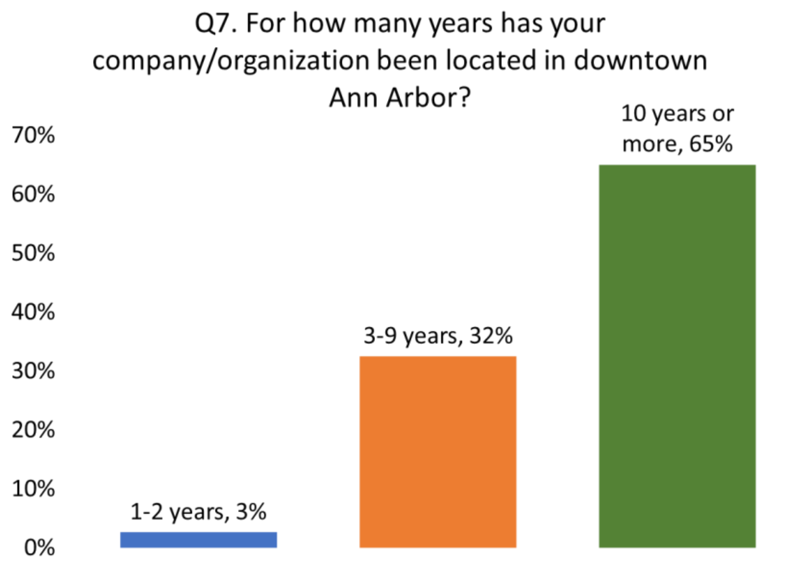


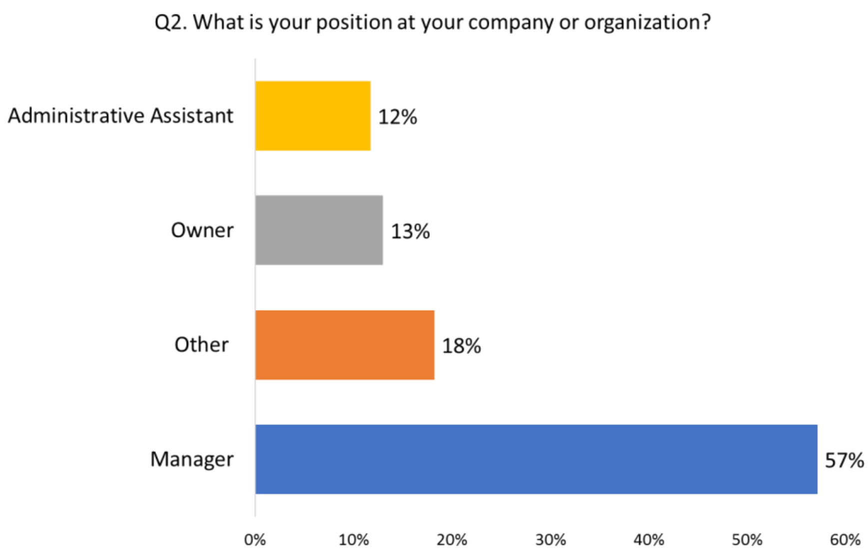
Figure 67 Type of Organization

Who are the decision-makers who responded to the survey?

Almost two thirds of the companies (65%) responding to the survey have been located in downtown Ann Arbor for 10 years or more. Another 32% have been located there for between three and nine years. Only 3% are relative newcomers, having been located in downtown Ann Arbor for between one and two years only. (Figure 66)

Although the sample is small, 77 companies or organizations responded, they represent a broad cross-section of the kinds of entities located in downtown Ann Arbor, as the figure above indicates. (Figure 67)

Figure 68 Respondent position within their organization

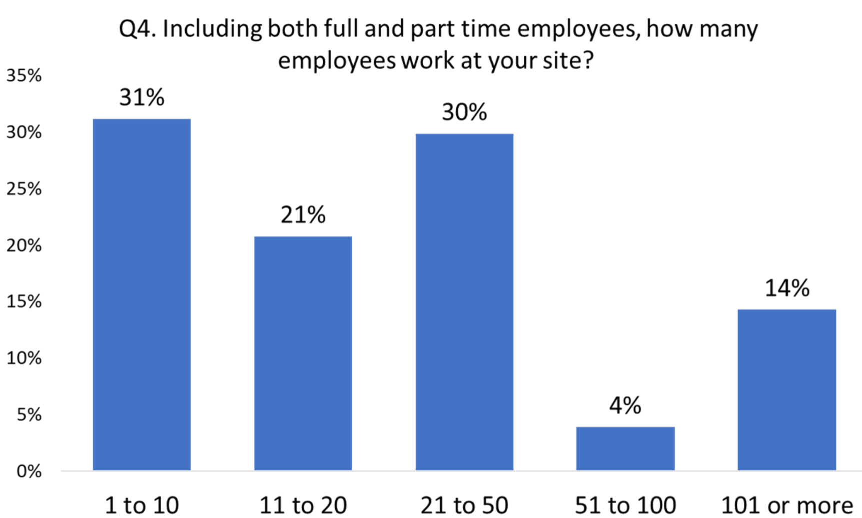


Organizational positions of respondents

The respondents tend to be managers, 57%, while another 13% identify themselves as owners, for a total of 70% clearly in managerial positions. Those shown in the chart as "other" also tend to be persons in responsible positions and able to respond to the types of questions asked in the survey. (Figure 68)

Other:
Analyst
Bookkeeper
Controller
court reporter
Director
Director (of Member Services)
Executive Director
Finance Administrator
Finance Associate
HR Business Partner
Human Resouces Specialist
Operations
Technical specialist
Vice President

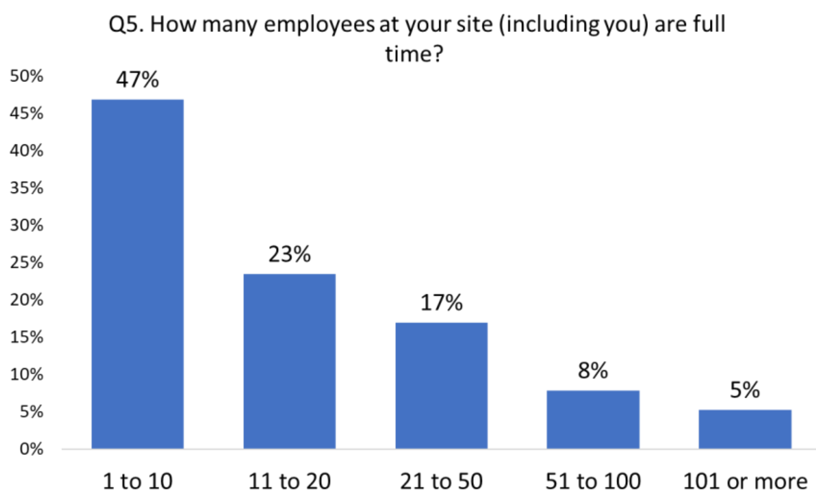
Figure 69 Number of employees in responding organizations



The size of responding organizations

The responding entities are nicely distributed among organizations of different sizes. For example, among the relatively smaller entities, 31% have between one and ten employees, while 21% have between eleven and twenty employees. The larger companies and organizations probably account for more employees who commute to downtown Ann Arbor, although they represent a smaller proportion of the sampled entities. (Figure 69)

Figure 70 Number of full time employees



Full time employees

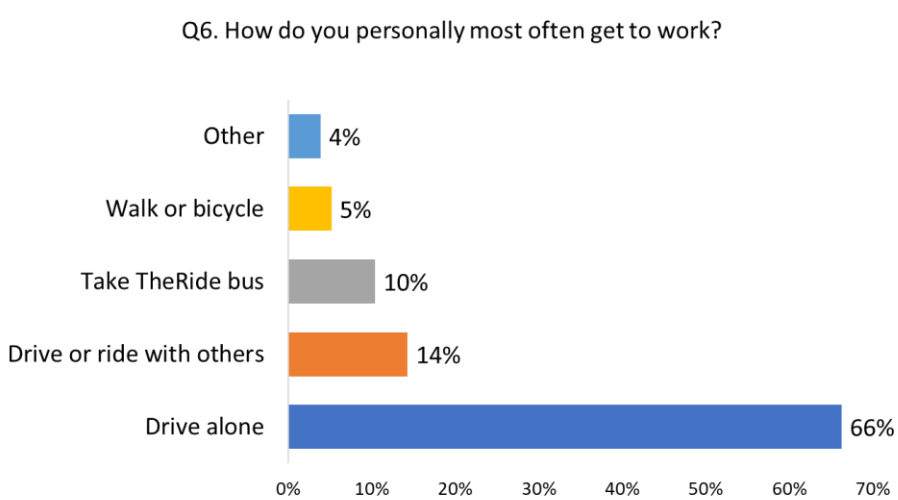
Almost half of the responding organizations have only a limited number of full time employees. Forty-seven percent (47%) have from one to ten full time employees. However, a total of 40% have from eleven to fifty employees, 8% fifty-one to one-hundred, and 5% more than 100. (Figure 70)

This suggests that while many of the employers are relatively small in terms of the number of employees – thus commuters – a smaller number of employers has a roughly equal number of full time personnel. Assuming that the respondents are roughly representative of the total employer base, then of every 100 employers:

- 5 would account for a minimum of 500 full time employees, while
- 8 would account for a minimum of 200 full time employees
- 17 would account for a minimum of 357 full time employees
- 23 would account for 253 full time employees
- 47 would account for a maximum of 470 employees.

Every 100 employers would thus account for a total of at least 1,789 full time employees most of whom can be assumed to be regular commuters to downtown Ann Arbor.

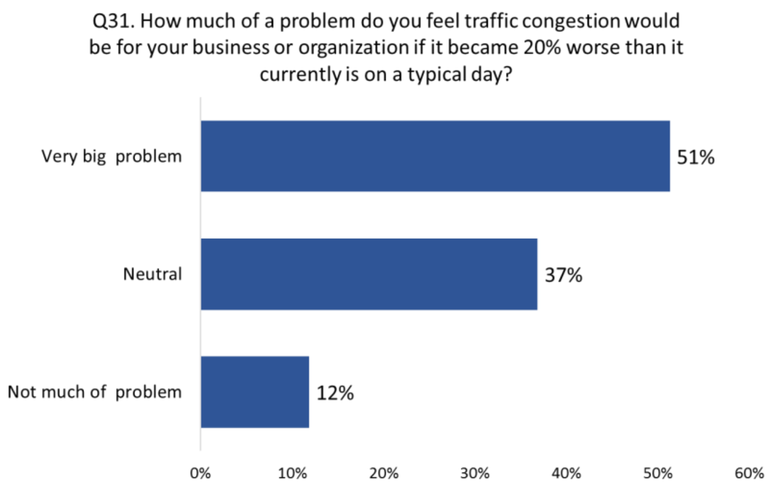
Figure 71 How employers commute



How employers commute

Employers, like their employees, tend to drive to work. Of all employer respondents, two-thirds (66%) drive alone to work, while another 14% carpool, ("ride with others"), and only 10% use TheRide. (Figure 71)

Figure 72 The business challenge of traffic congestion



Employer perceptions of traffic congestion as a business problem

Rather than asking decision-maker respondents how problematic traffic congestion is today, the survey asked how much of a problem it would be for their business or organization if congestion became 20% worse than it is currently on a typical day. Slightly over half, 51%, indicated that it would be a "very big problem." Another 37% said they were neutral on that matter. Only 12% said that it would not represent much of a problem. (Figure 72)

It is apparent that there is a concern about how an increase in traffic congestion would adversely affect business.

Figure 73 The business challenge of limited parking

Employer perceptions of Availability of parking as a business problem

Respondents were asked a similar question regarding parking. Wording is shown in Figure 73. In this case, almost three fourths, 74%, said that it would be a very big problem, 18% were neutral on the matter, and only 8% said it would not represent much of a problem. (Figure 73)

Clearly, parking is a significant issue to downtown businesses and other organizations.

Chapter 2: Awareness of and Satisfaction with getDowntown

Decision makers were asked how satisfied they were with the services of getDowntown. The response choices were:

- Very satisfied
- Neutral
- Not at all satisfied

As indicated by Figure 74, the overwhelming majority of respondents indicated they were very satisfied, and none indicated dissatisfaction. Ten percent (10%) indicated neutrality on the matter.

Figure 74 Satisfaction with GetDowntown services

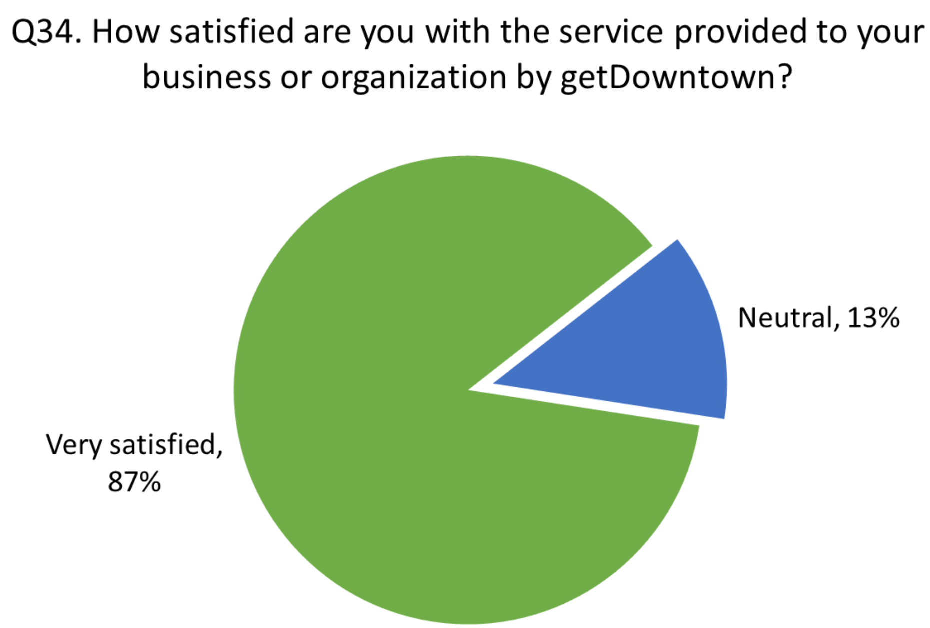
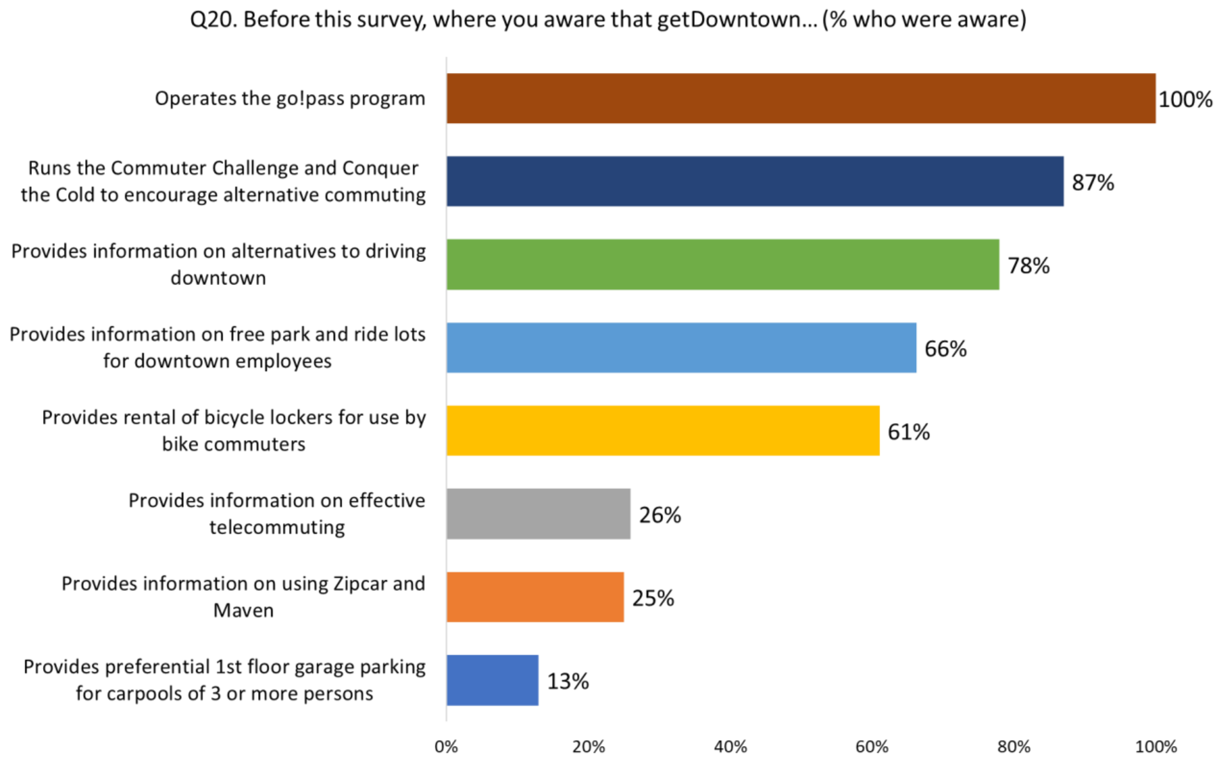


Figure 75 Awareness of getDowntown services

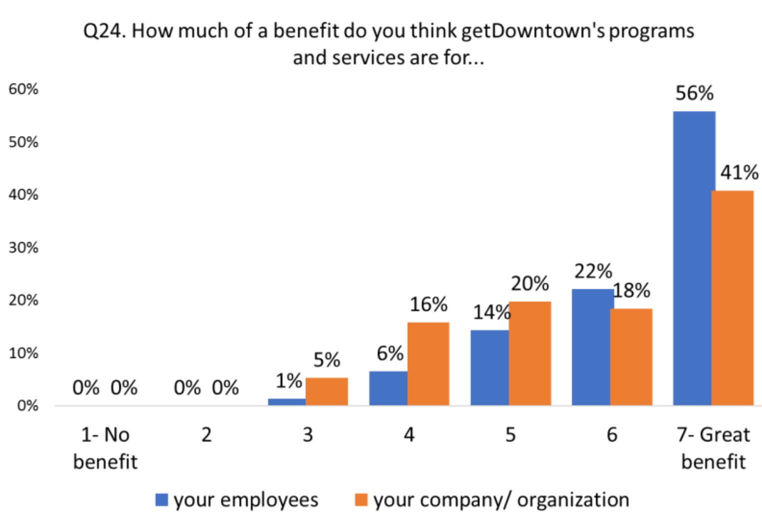


Awareness of getDowntown services

Decision makers tend to be aware of the basic services of getDowntown. For example, 100% indicated awareness that getDowntown operates the go!pass program, 87% that it runs the Commuter Challenge, and 78% that it provides information of commuting alternatives. More than 60% are also aware of the getDowntown role in providing information on park and ride lots and of the provision of bicycle lockers for rent. (Figure 75)

Awareness is limited for the getDowntown role in providing information on effective telecommuting, the use of short-term rental cars (Zipcar and Maven) and preferential first floor parking for carpools of three or more persons.

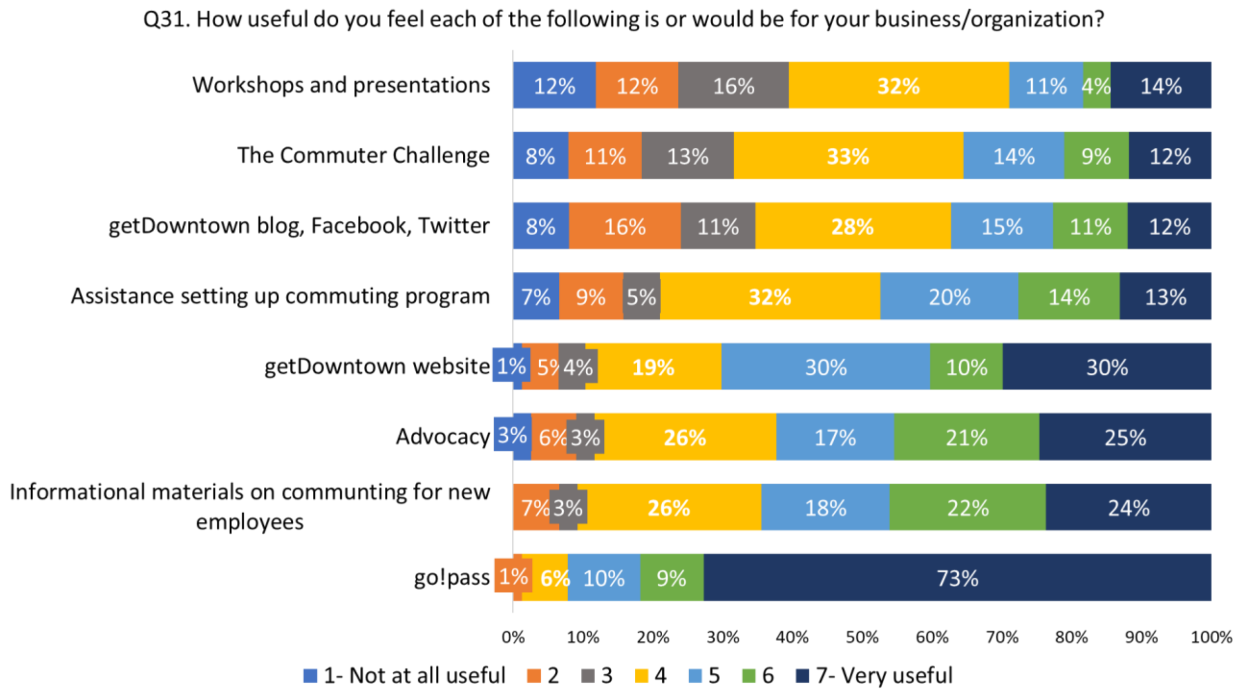
Figure 76 Perceived benefit of getDowntown services



Perception of getDowntown benefits

Most decision-makers find significant benefit from the getDowntown programs. A majority, 56%, find them of great benefit to employees. Many, 41%, also find them of great benefit to the company or organization itself. (Figure 76)

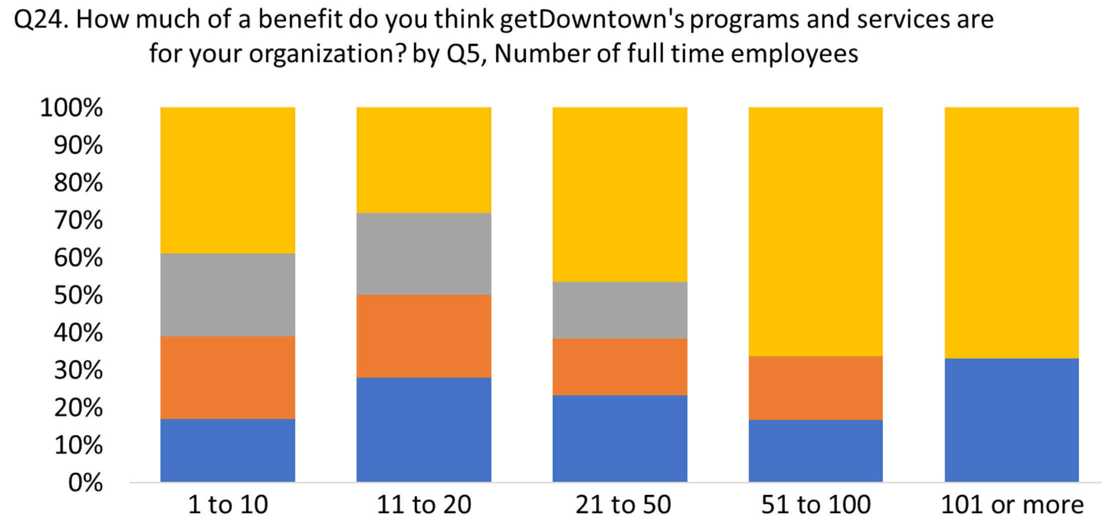
Figure 77 Usefulness of getDowntown programs



Usefulness of getDowntown for member organizations

When asked how useful various getDowntown programs are for their organizations, more decision-makers named the go!pass as very useful (73%) than any other feature of the getDowntown programming. A second tier of services that were well rated included the getDowntown website (30%), advocacy efforts (25%), and informational materials on commuting for new employees (24%).

Figure 78 Extent of benefit of GD programs to employer, by number of full time employees



	1 to 10	11 to 20	21 to 50	51 to 100	101 or more
Great benefit	39%	28%	46%	67%	67%
Some benefit	22%	22%	15%	0%	0%
Small benefit	22%	22%	15%	17%	0%
Minimal benefit	17%	28%	23%	17%	33%

The benefit of getDowntown to organizations of differing size

Although the sample is small, it appears that the larger organizations may find greater organizational benefit than smaller ones. While approximately two-thirds of the organizations with fifty-one or more full time employees say that getDowntown offers them great benefit, that is true of fewer of those with ten or fewer full time employees (39%), or of those with eleven to twenty full time employees (28%), or twenty-one to fifty full time employees (46%).

Decision-maker perceptions of how getDowntown programs benefit their employees, in their own words

Figure 79 Open end description of how decision-makers perceive getDowntown programs benefit employees

Q25. Please describe how getDowntown's services benefit employees of your company/organization
A GoPass is a high-value benefit to our employees because we are in a high cost area, and our employees are not highly paid.
Allows busing for some of the employees
Allows me personally to commute from Chelsea to Ann Arbor-great...
Although we have some limited free parking, we prefer taking the bus as the transit center is only 4 blocks away.
An alternate source of transportation.
Bus passes
Bus passes are a great option for most of our employees who would otherwise drive alone as their primary commute option. Since most of our staff chooses to park outside of downtown to avoid parking fees, taking the bus is also usually a time saver.
Cheaper Bus fare
Employees benefit a great deal, especially since our parking spots were not renewed this year. Our organization doesn't benefit a great deal given most are UM students who take blue buses. We could do more to promote airport/late night shuttles if that's under the getDowntown's services. We could also provide a link on our website to promote the use.
Employees who commute by bus.
Encouraging an array of mobility options which helps us meet our mission
For our staff who are fortunate enough to be able to afford to live close enough to use it, the bus pass is a great deal.
Free bus pass.
Go Passes
go passes are nice
Great to have the bus pass option, as many of our folks are students from EMU and live in Ypsi. Also, we're an environmental org, so it fits with our mission to be able to provide alternative commuting options.
Inexpensive option to take the bus instead of trying to find parking
It gives them a stress free option to go to work
It helps us reduce our carbon footprint but other than that we don't really use or need to use any of the services
It offers a reasonable alternative to get to work.
Makes Ann Arbor a better place to work/live
Many live close but not walking close and GoPass! provides excellent opportunity to get to the office
Many of my employees would not be able to get to work without the GO Pass. Most are on Social security disability.
Many of our people have used it over the years to get to work, we ahve a terrible parking situation. Plus the discounts to local businesses, our people use them for meetings. Keep it up!
Many of us use gopasses.
Most of our Ann Arbor employees use the GoPass to get to work.
Most of our employees are able to walk to work, however, Michigan weather isn't always walking friendly! This provides an option for our employees to get to work dry & warm!
Most of our employees live on the bus route and take advantage of the bus. We have very limited on site parking.
Most of our employees live very closeby to work, but those that use the go Pass really enjoy it.
Most of our employees use the GoPass for the discounts at downtown businesses. We have a couple of employees who use the Ride on a regular basis.
Offers more affordable options for transportation
Our employees who work at the Ashley property can take a bus to work decreasing congestion in the downtown. It is also better for the environment and the community when people use public transportation.
Our HQ are in Livonia, MI and we have a very small office in Downtown AA so this is beneficial to those employees but on a very small scale -- only about 5 people at this time
Personally, I use the bus frequently. Unfortunately my other employees live in the Detroit suburbs and although they could use park and ride, they simply drive down and park in a garage.

Decision-makers were asked to describe how getDowntown services benefit their employees. More mentioned the GoPass or low-cost bus fare then mentioned any other feature. However, some mentioned the quality of life improvement to Ann Arbor and others environmental effects.

It is quite clear that it is the bus fare benefit that is seen is the most noticeable and important aspect of the getDowntown organization to the employees of member organizations.

Q25. (Continued) Please describe how getDowntown's services benefit employees of your company/organization
Provides another way to get to work without driving
Provides information re alternative methods of travel.
provides, easy, reliable, free way to get to work
Since our company does not provide any reimbursement for parking fees the getdown pass has given our employees a way to keep the money they earn in their pocket by taking the bus to downtown.
Some would not be able to work here without the go!pass
The biggest thing is it allows our employees a real cost effective way to get to work. This is a big deal because we are located in the middle of downtown and parking can be very expensive.
The buses are utilized by just a few of our full time staff. We are a night-time live music venue, and not all managers live within Ann Arbor or Washtenaw county - so late night shifts are best staffed by the employees driving and parking themselves. A few volunteers ride buses regularly, but most often those who drive give rides home to those who take buses.
The getDowntown Program eliminates obstacles, allowing us to broaden our hiring range and incorporate downtown Ann Arbor employment options into the possibilities of candidates who would otherwise have accessibility challenges.
The Go!Pass is very widely used in our organization.
The goPass from getDowntown is there only method of commuting to work
The goPasses are pretty key for those that I can convince not to park.
The inexpensive Go!Pass is very appreciated. At least one of our employees uses it every day, and we all value the local merchant discounts. Oftentimes we will choose to grab lunch at a place that gives some sort of discount via the Go!Pass program.
The staff use the go passes
Those employees willing to walk a few blocks to the office are provided a go!Pass. Many prefer that we pay for parking spaces close to the office which we offer 50% parking to all employees on a rotating schedule.
Using mass transit reduces traffic and congestion in the city and allows employees a low cost means of transportation.
We are a non-profit and few of us can afford to pay to park downtown, so the Go Passes are very helpful as are the park and ride options. Being able to offer these benefits to employees helps bridge the gap between the cost of parking/commuting and what the org is able to pay for employees.
We have employees that do not own a car and employees that prefer to take bus rather than driving
We love being able to allow some of our employees easier access to the office that doesn't involve paying expensive parking.
We only have 3 available parking spots at our location so not all employees can park at the office on a particular day. Many employees bike, walk, or take the bus and having the go!passes available encourage more employees to alternative commute
We pay for parking- and the go!pass helps us cut costs
When new hires here they are eligible for a Gopass for TheRide their faces lights up like a Christmas Tree. Lol!

Decision-maker perceptions of how getDowntown programs benefit their employees, in their own words

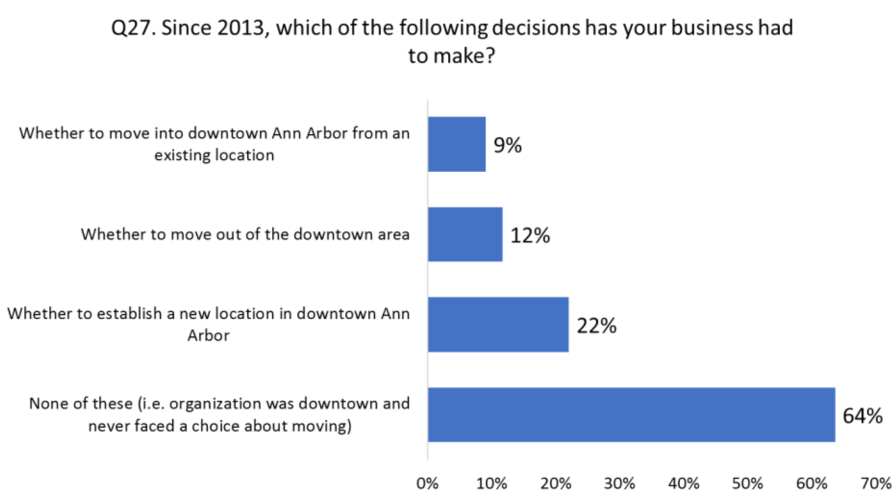
Decision-makers were also asked in what ways getDowntown programs benefit their organizations. Their verbatim responses are shown in the table below. Again, it is the go!pass that is most frequently mentioned. The go!pass is important to these businesses as a benefit that can be provided inexpensively, but that is highly valued by many employees. This is said to reduce turnover, improves timeliness of employees, reduces the need to provide parking, and provides other benefits.

Figure 80 Open end description of how decision-makers feel getDowntown programs benefit their organizations

Q26. Please describe how getDowntown's services benefit your organization/comp+A2:A36any
A bus pass is a nice benefit to be able to provide for employees.
Allows us to provide another benefit to our employees
Being able to offer a Go!Pass to employees is something we see as a big positive.
Frees up parking space
getDowntown is aligned with our core values of helping people and the environment.
Go!pass allows employees to save $ on parking
goPasses save parking fees
Great program with wonderful benefits.
Great service! Really helps our employees get to and from work. Thanks!
Having these benefits help us attract and keep employees who don't live in downtown Ann Arbor. People who commute are the vast majority of our staff.
helps cut costs instead of paying for parking, and also encourages employees outside of downtown to be OK with working downtown.
Honestly, the best thing it does is create a more vibrant, walkable, diverse downtown which is why we located here to begin with.
I get a wider variety of employees who are able to work downtown
It helps retain employees, so we are not constantly training.
It is a nice perk to offer
It offers a great way to help employees get to work
Larger potential employee pool to choose from
Low cost transportation for employees
Makes it easier for staff to get to work on time
Makes our employees happy:)
many of our employees do not have cars, and rely on the bus system.
provides cost-effective way to commute
Provides more job opportunities
Some employees choose us because of the free bus pass
Staff work here longer due to them receiving a Gopass to ride to and from work.
The availability of affordable bus passes is essential to our ability to support employees in alternative commuting. Even as a small nonprofit we are able to cove the full cost, which helps make up for not offering any assistance with parking costs.
The goPass from getDowntown is there only method of commuting to work
These services allow us to engage and employ individuals who may otherwise find themselves outside of the workforce due to diversabilities. This capability aligns with our mission and vision and allows us to demonstrate Social Responsibility and Inclusion.
They benefit a small portion of our employees-great...
They benefit downtown businesses in general by providing access to the downtown area for people to work and enjoy the downtown area. We are a better mix of different people with transportation services providing access to many who may not drive or don't want to drive cars.
Two of our employees don't require (expensive) parking passes because they live conveniently close to a bus line and use the Go!Pass. This saves our company money.
We are a teen center and most of them take the bus.
We attract employees who might not consider working downtown if they weren't provided the pass.
We can offer GoPass as an alternative to parking, since we do not have access to any unpaid lot.
We can offer our employees free and affordable transportation to and from work
You guys have been great to work with

Chapter 3: Business Decisions and Policies

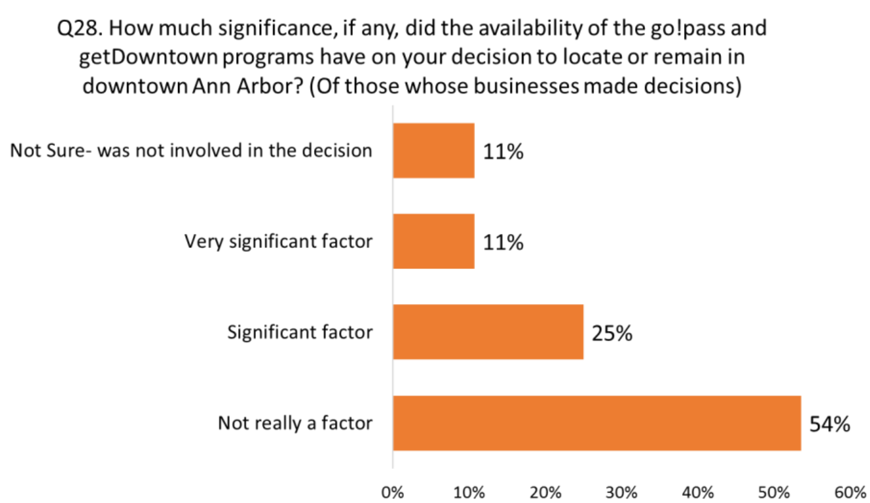
Figure 81 Location decisions made by participating organizations



Location decisions faced by responding organizations

Most of the respondent organizations (64%) indicated that they had not faced location decisions in the past five years. However, 22% had faced the decision on whether to establish a new location in downtown Ann Arbor. Another 12% faced a decision regarding a move out of the downtown area, and another 9% faced a decision whether to move into downtown Ann Arbor from another location. (Presumably the latter decided to move into downtown Ann Arbor, given that they are among the downtown employers in the survey sample.) (Figure 81)

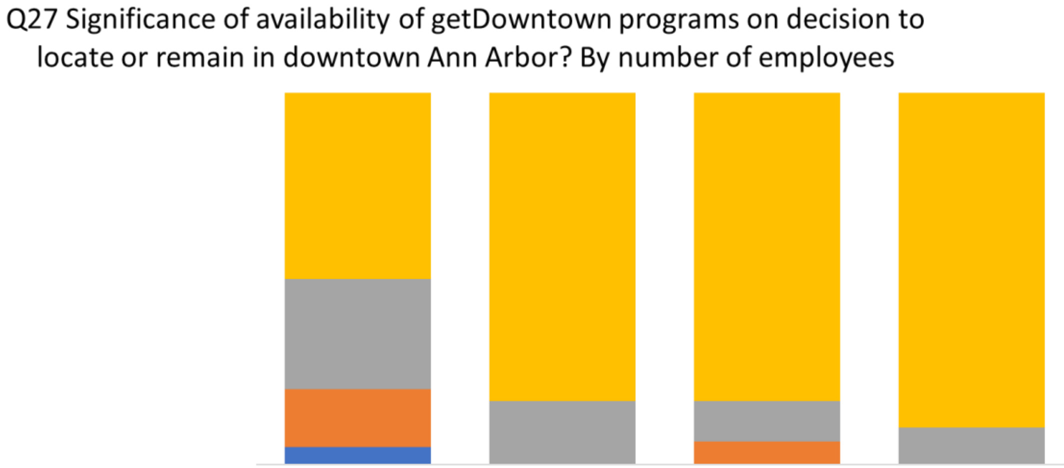
Figure 82 Significance of getDowntown programs on location decision



getDowntown influence on these decisions

Although a majority (54%) of the respondents say that the getDowntown programs were not really a factor in their decision regarding locating or remaining in downtown Ann Arbor, 36% said they the programs were either a significant or very significant factor. (Figure 82)

Figure 83 Significance of getDowntown programs on location decision, by number of employees



	Two to ten employees	Eleven to twenty employees	Twenty-one to fifty employees	Fifty-one or more employees
Not really a factor one way or the other	50%	83%	83%	90%
Significant factor	30%	17%	11%	10%
Very significant factor	15%	0%	6%	0%
Crucial – would not be located downtown without this program	5%	0%	0%	0%

Organization size and the importance of getDowntown programs to location decisions

The availability of getDowntown programs is more important to the smaller organizations than to larger ones in terms of their location decisions. While 10% of those organizations with fifty or more employees say that the programs are at least a "significant factor," 50% of the smallest organizations and from 11% to 17% of the mid-size organizations say it is a significant factor.

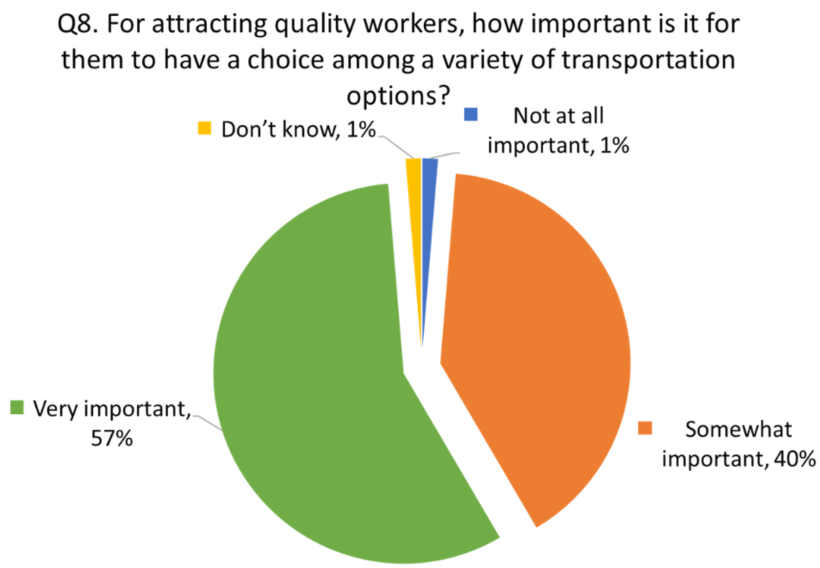
The smallest organizations with from two to ten employees find the programs especially important, with 15% saying they are "Very significant," and 5% that they are "crucial." Presumably such organizations lack the kinds of resources for employee benefits, free parking, and other factors that may be available to larger entities. Also, the largest entities have much larger, likely national, business environments in which to operate, and thus many more significant variables pressing on the location decision, than small organizations.

Transportation options as a recruiting tool

A majority of 57% of employers say that it is very important in attracting quality workers to have transportation options for employees to commute. Another 40% say it is somewhat important. Only 1% say it is not important at all. (Figure 84)

Clearly, employers see transportation options as a matter important to their organization's personnel recruitment.

Figure 84 Perceived importance of transportation options for employee recruitment



Transportation options and attracting clients/ customers

Of all employers, 55% say it is very important to have a choice among various transportation options to attract clients or customers, and 26% say it is somewhat important. However, 14% say it is not at all important compared to only 1% who said it is not at all important in recruiting quality personnel. (Figure 85)

Figure 85 Perceived importance of transportation options for attracting customers/clients

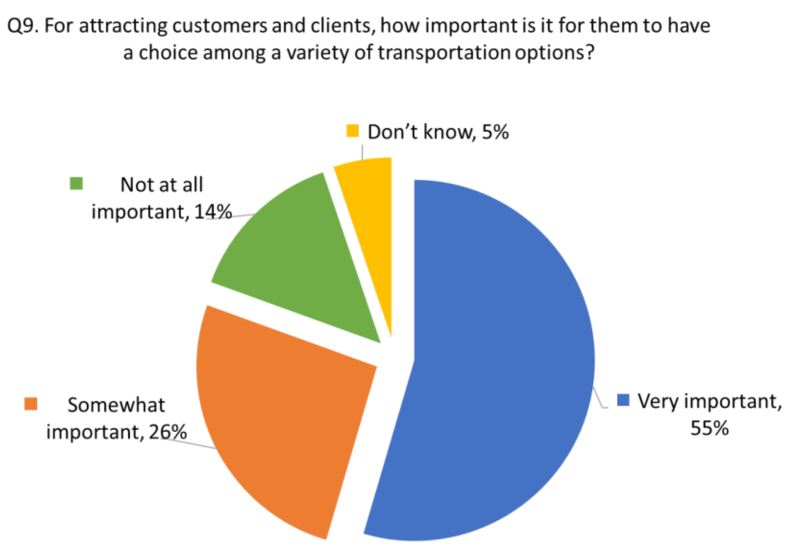
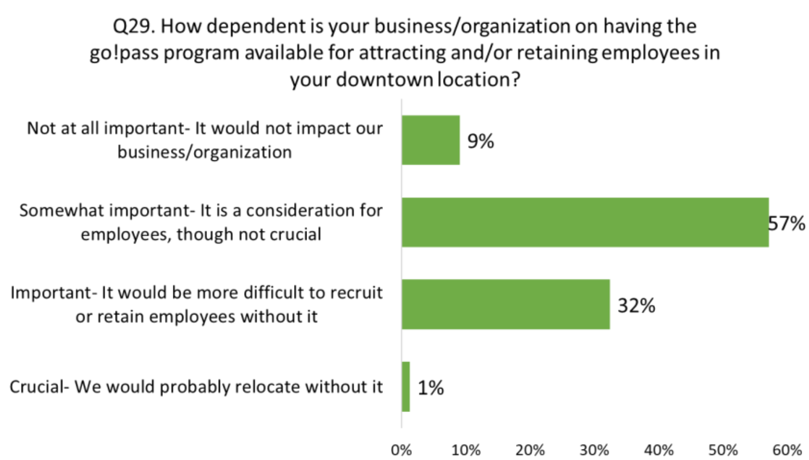


Figure 86 Importance of commuting benefit to personnel recruitment

Commuting benefit program as a personnel recruitment tool

While only 6% of employer respondents said that the availability of a comprehensive commuting benefit program was crucial to attracting or retaining good employees, many employers indicated that such a program was either very significant (32%) or was a helpful benefit, 53%. Only 8% said that such a program makes no difference to employees. This suggests the great importance of the go!pass program not only to employees but to the organizations themselves. (Figure 86)

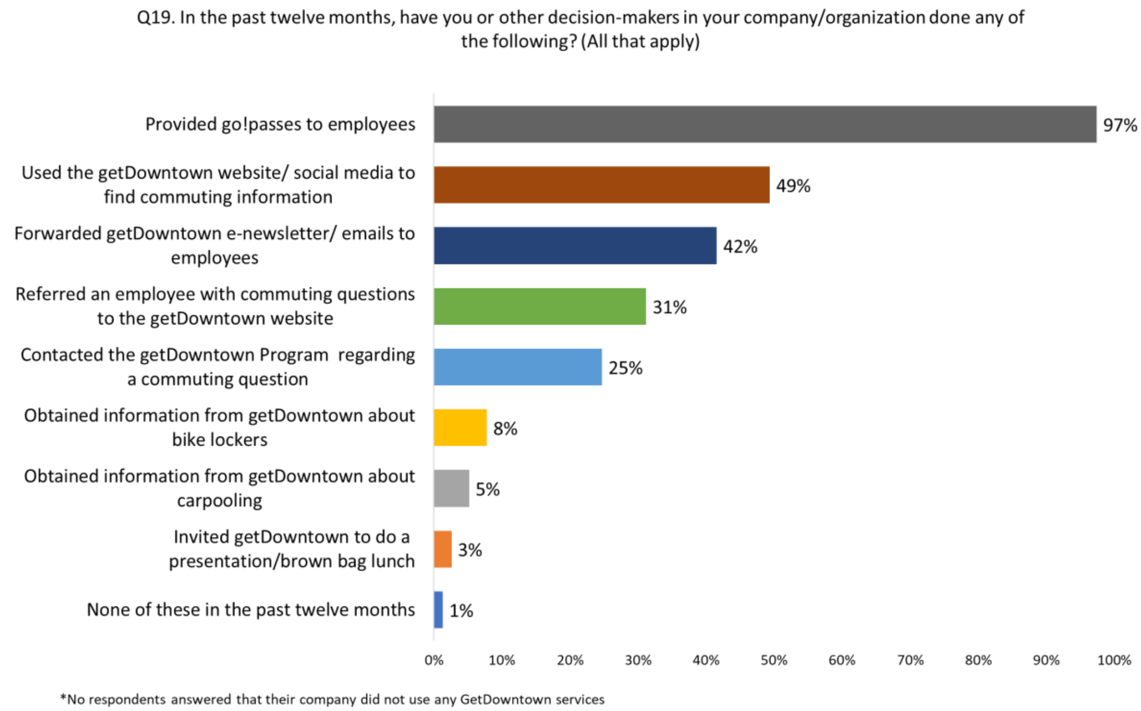
Figure 87 Dependence of employee recruitment on availability of go!pass program



Importance of go!pass to employee recruitment / retention

Most decision-makers (57%) say that the go!pass is "somewhat important" to recruitment and retention. This is belief also reflected in their verbatim open-end responses shown in Figure 79 and Figure 80. On the other hand, another third (32%) say it is "important" in that it would be difficult to recruit or retain employees without it. (Figure 87)

Figure 88 Employer actions utilizing getDowntown programs

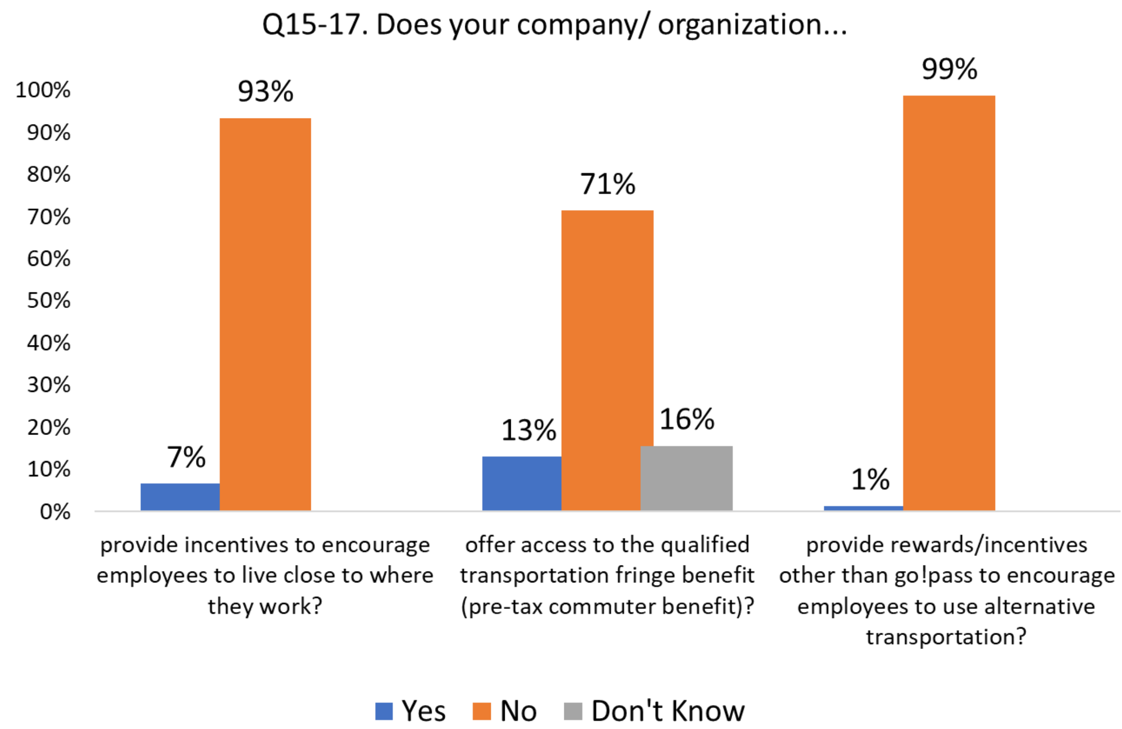


Using getDowntown services

Employers were asked what, if any, of the getDowntown service they had used in the past twelve months. Almost all (97%) said they had provided go!passes to employees. This was clearly the dominant element of service, given that the next most frequent mention was 49% who said they had used the getDowntown social media or website for commuter information, and the third most frequent (42%) forwarding getDowntown newsletters or emails to employees. Some (31%) had referred an employee who had commuting questions, and 25% had contacted getDowntown with a commuting question.

Clearly, employers are finding getDowntown useful in several respects.

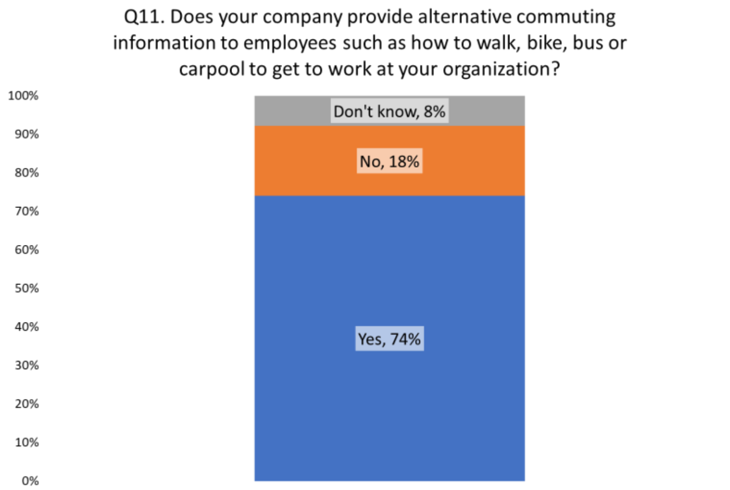
Figure 89 Providing incentives to use alternative modes



Providing incentives to use alternative modes

Very few employers provide the types of tangible rewards or incentives described in the chart above. For example, only 7% said that they provide incentives to encourage employees to live close to where they work, and only 1% said they provide incentives other than go!pass. The most common incentive is offering access to the qualified transportation fringe benefit, which 13% of respondents say they do provide.

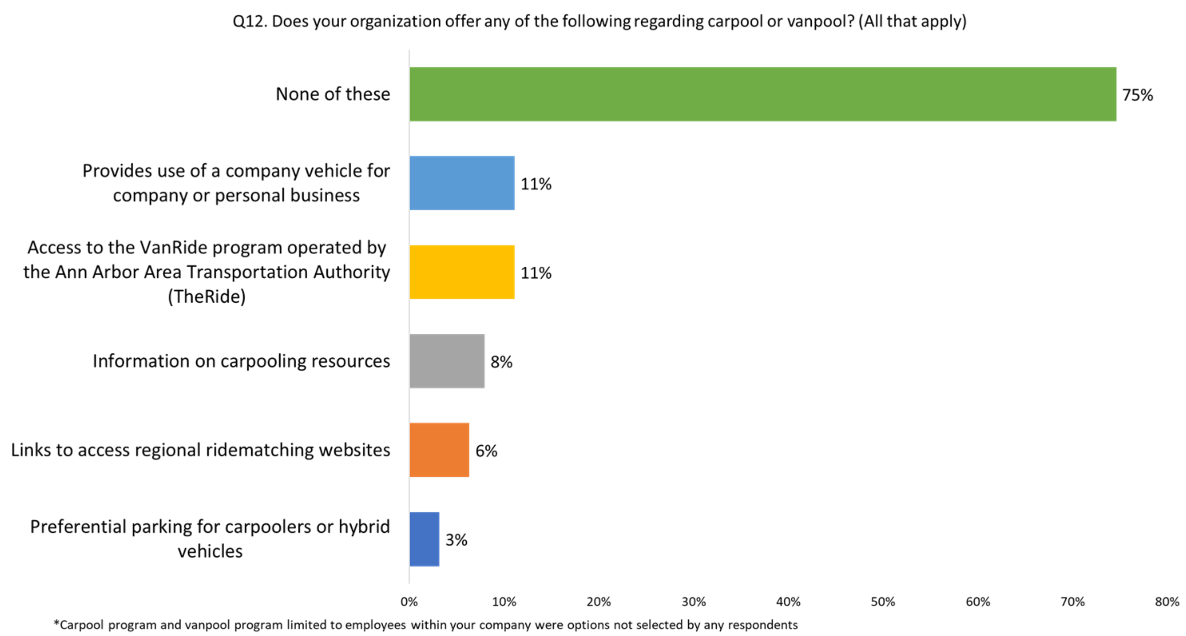
Figure 90 Providing information on using alternative modes



Alternative mode information

Most employers (74%) provide information on alternatives for commuting such as walking, biking or carpooling. (Figure 90)

Figure 91 Providing support for car/van pooling

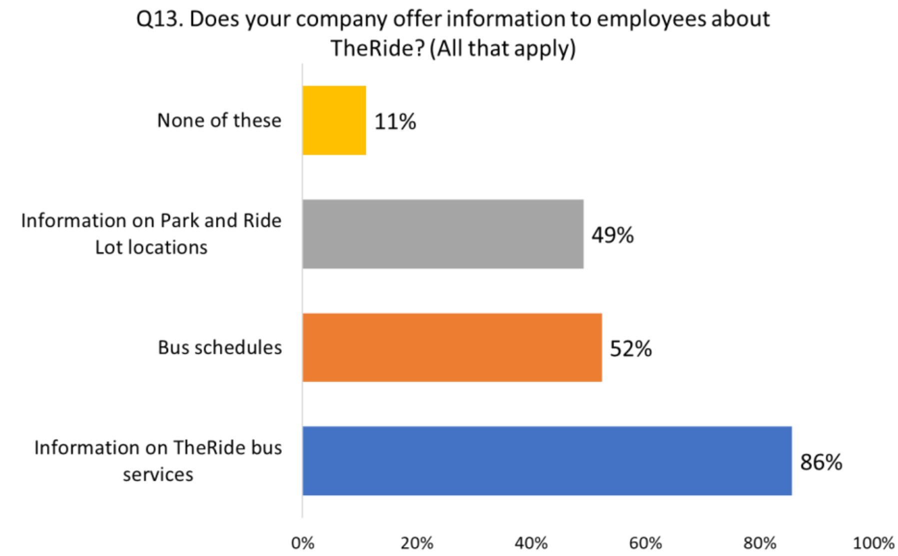


Providing tangible resources to support alternative commuting modes

Although employers tend to say they provide alternative commuting information, three-fourths of them (75%) say they do not provide any of the tangible resources listed in Figure 91 that might support use of alternative modes. For example, only 11% say they provide use of a company vehicle during work hours of work or company business, a resource that would presumably reduce that important motivation to drive to work. (Figure 91)

Other resources, including access to TheRide's vanpool program, carpool information and other factors are similarly provided by only a small percentage of employers.

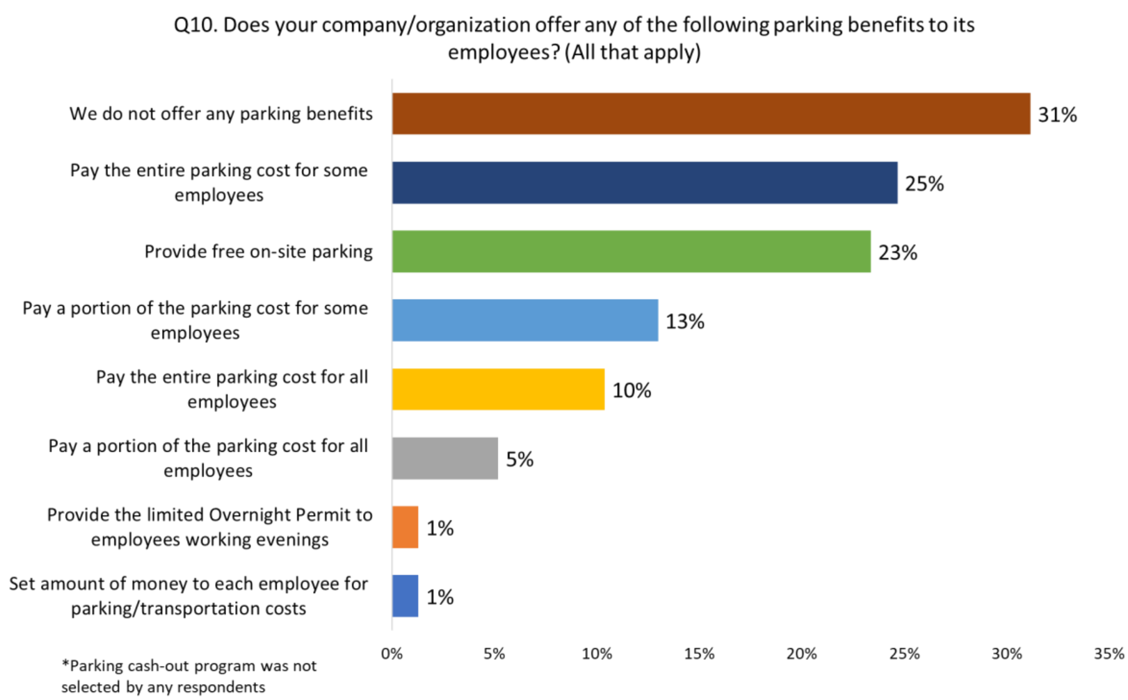
Figure 92 Providing information on using TheRide



Information on using TheRide

Most employers (97%) provide go!pass as we saw in Figure 88. And 87% say they provide information on using TheRide. Approximately half of employers say they provide schedules and information on park & ride locations. (Figure 92)

Figure 93 Parking benefits - a counter-incentive



Parking benefits

Providing parking benefits a counter-incentive to the encouragement of alternative modes of commuting. Only 31% of employers say they provide no parking benefits. Thus, many employers (69%) provide some parking benefits. One fourth of employers (25%) pay the entire costs of some employees' parking while 23% provide free on-site parking. Still others (a total of 18%) provide partial payment of parking for some or all employees. (Figure 93)