Rappahannock-Rapidan PDC
Northern Virginia HOV System
Western Feeder Market Study

January 6, 2006

Prepared By

Southeastern Institute of Research

2005 Rappahannock-Rapidan Market Survey

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Study Focus

How To Increase Ridesharing Among Rappahannock-Rapidan PDC Commuters Traveling To or Through Northern Virginia

149,100 Rappahannock-Rapidan Regional Commission region.

Rappahannock-Rapidan PDC Counties of Culpeper, Fauquier, Madison, Orange, and Rappahannock

Southeastern Institute of Research
Rappahannock-Rapidan PDC Commuters’ Potential Impact On Northern Virginia Congestion

Commuter-related statistics reported in the 2003 RRRC Commission Labor Force Study:
- 59% of all of the area residents work
- 36% journey to work outside of PDC
- 90% travel to/through Northern Virginia
- 86% are SOVers

Rappahannock-Rapidan PDC Maximum Market Potential:
- 150K residents x 59% who work = 88,500 work
- 88,500 workers x 36% who go outside PDC = 31,860
- 31,860 x 90% who go to/through Northern Va. = 28,674
- 28,674 x 86% who are SOVers = 24,659
- Total maximum opportunity: Approximately 25,000

SOVers make up the target market for new ridesharers.

Why Don’t More Rideshare?
83% of the SOVer’s Commuting From The Rappahannock-Rapidan PDC To/Through Northern Virginia Ride On Highways with HOV Lanes. And, Many Believe They Could Save Time If They Qualified For HOV Lane Use.

83% of the SOVer’s Commuting From The Rappahannock-Rapidan PDC To/Through Northern Virginia Ride On Highways with HOV Lanes. And, Many Believe They Could Save Time If They Qualified For HOV Lane Use.

Study Objectives
- Identify and profile current ridesharers and optimal rideshare prospects.
- Understand current perceptions, misperceptions, and barriers to ridesharing.
- Measure the potential demand and service requirements for alternative TDM programming - HOT Lanes, NuRide Concept, etc.
Commuter Definition Used In This Study

- **Current Ridesharers**
  - Currently commute in a ridesharing arrangement (i.e., carpool, vanpool, bus, rail) on a regular basis (3 times a week or more) to or through Northern Virginia

- **Current SOVers**
  - Currently commute by themselves (i.e., drive alone) to or through Northern Virginia at least 3 days a week

Study Methodology

**Phase I Fieldwork: July 2005**
- Incentive: $5 gas certificate
- Small space ad in community newspapers
- 860 surveys distributed on cars at park and ride lots.
- Email to rideshare database
- 4,000 total SOV survey packages were mailed across both regional commissions:
  - Targeted upscale neighborhoods
  - Areas had high propensity to rideshare based on database
- Survey instrument was included
- Postage paid BPE
- 437 total completed surveys

**Response:**
- 112/4,000 = 2.8% response rate on just mailing
- 437 total completed surveys - mail and online by end of phase I

**Phase II Fieldwork: August**
- Incentive: $5 gas certificate
- 10,000 postcards (5,000 in each regional commission) to residents inviting them to take survey online (no questionnaire was included).

**Response:**
- 148 additional online completed questionnaires
- 148/10,000 = 1.5% response rate on mailing

Noticed big use of online survey option. Many commuters opted for online rather than filling out paper survey. This required them to go online and search for PDC site for survey link.

Study Participation

<table>
<thead>
<tr>
<th>Total Survey Responses:</th>
<th>Ridershare</th>
<th>SOVers</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rappahannock - Rapidan PDC</td>
<td>165</td>
<td>185</td>
<td>350</td>
</tr>
</tbody>
</table>

350 completed interviews affords a margin of error of +/- 5.2% at the 95% confidence level for total respondents - all commuters.

165 completed interviews affords a margin of error of +/- 7.6% at the 95% confidence level when viewing responses of all ridesharers.

185 completed interviews affords a margin of error of +/- 7.2% at the 95% confidence level when viewing responses of all SOVers.
**Ridesharers Are Evenly Split Male/Female**

Female 49%
Male 51%

**Ridesharers Have High Incomes**

Mean Income is $103,000

- Less than $50,000: 14%
- $50,000-$74,999: 20%
- $75,000-$99,999: 29%
- $100,000-$124,999: 13%
- $125,000-$149,999: 7%
- $150,000-$199,999: 4%
- $200,000 or more: 1%

**More Than Two Thirds Are Between the Ages of 35 and 54**

- Under 25: 1%
- 25-34: 7%
- 35-44: 14%
- 45-54: 14%
- 55-64: 22%
- 65 and older: 3%

**One-Third Hold Management Positions**

- Management: 32%
- Administrative: 18%
- Technical: 12%
- Analytical: 12%
- Customer service: 6%
- Sales: 3%
- Advisory: 1%
- Other: 9%
Almost Half of Ridesharers Work for the Federal Government

Slightly Less Than Half of Ridesharers Have at Least One Child Living at Home

More Than Two-Thirds of Ridesharers Have Lived in the Area for More than 5 Years

Most Ridesharers Commute at Least 5 Days a Week
Half of Ridesharers Commute 1.5 Hours or More Each Day, One Way

Most Ridesharers Use Vanpools or Carpools with Multiple Riders

75% of Ridesharers Estimate that they Spend $6-to-$15 Per Day To Rideshare

Not Surprisingly, 75% of Ridesharers Estimate It Would Cost $16-to-$40 to Drive Alone

NOTE:
1) Percentages total more than 100 because some respondents use more than one form of transportation in a typical week.
Key Finding:
For the most part, Rappahannock-Rapidan rideshare commuters are Baby Boomers, not GenXers. Gender is evenly split. They tend to be people who have lived in the PDC for some time and have commuted long distances for years to government jobs. Half earn over $100K annually.

Most of these ridesharers commute for 1-2 hours each way (70%) and recognize that they save a lot of money in doing so. They are most likely to travel on I-66 during their commute (68%) in vanpools or carpools with multiple riders (not just one other rider).

Strategic Implication:
Give consideration to profiling existing ridesharers in marketing materials using testimonials on how much they save and how ridesharing has worked for them over the years.
Factors Influencing Commute Decisions of Ridesharers Can Be Divided Into Three Tiers of Importance

**Top Tier**
- Dependability of commute
- Time it would take to get to work
- Cost
- Time it would take to get home
- Safety
- Ease of commute
- Level of stress

**Middle Tier**
- Morning departure time
- Flexibility to arrive and leave at leisure
- Concern about being stranded at work
- Better use of commute time
- Convenience
- Impact on environment

**Lower Tier**
- Ability to make stops/run errands
- Ability to make work-related trips
- Concern about being stranded at work
- Cost
- Ability to make other stops during commute
- Time alone

---

**Top Tier Factors:**
Time Savings, Dependability, and Money Savings Play a Key Role in Commute Decisions

- Dependability of commute: 7%
- How much time it would take to get to work: 6%
- Cost of travel to and from work: 8%
- Safety: 8%
- Time I would get home: 87%
- Ease of my commute: 87%
- Level of stress related to commuting: 86%

**Middle Tier Factors:**
Flexibility, Convenience, Concerns of Being Stranded Are Slightly Less Important in Commute Decision-making

- Morning departure time: 14%
- Better use of commute time: 69%
- Flexibility to arrive and leave at leisure: 66%
- Concern about being stranded: 66%
- Convenience: 58%
- Impact on environment: 40%

**Lower Tier Factors:**
Time Alone and Being Able to Run Errands Are Important to Only About a Quarter of All Ridesharers

- Ability to make other stops during commute: 24%
- Time alone: 22%
- Ability to make work-related trips: 21%
Lowering Transportation Costs, Avoiding Traffic Congestion, and Saving Time by Using HOV Lanes Are Most Important in the Decision to Rideshare

<table>
<thead>
<tr>
<th>Benefit</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Extremely Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save time by using HOV lanes</td>
<td>19%</td>
<td>71%</td>
<td>7%</td>
<td></td>
<td></td>
<td>91%</td>
</tr>
<tr>
<td>Avoid some of the traffic congestion</td>
<td>19%</td>
<td>71%</td>
<td>7%</td>
<td></td>
<td></td>
<td>91%</td>
</tr>
<tr>
<td>Lower my transportation costs</td>
<td>27%</td>
<td>68%</td>
<td>5%</td>
<td></td>
<td></td>
<td>91%</td>
</tr>
<tr>
<td>Be less stressed</td>
<td>30%</td>
<td>40%</td>
<td>30%</td>
<td></td>
<td></td>
<td>74%</td>
</tr>
</tbody>
</table>

Use of Commute Time for Work or Personal Time or Companionship During the Commute Were Not As Important As Saving Time & Money and Avoiding Some Congestion

<table>
<thead>
<tr>
<th>Benefit</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Extremely Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualify for transportation financial support</td>
<td>10%</td>
<td>55%</td>
<td>35%</td>
<td></td>
<td></td>
<td>55%</td>
</tr>
<tr>
<td>Wouldn't have to find parking space</td>
<td>15%</td>
<td>55%</td>
<td>30%</td>
<td></td>
<td></td>
<td>46%</td>
</tr>
<tr>
<td>Use commute time for personal time</td>
<td>10%</td>
<td>55%</td>
<td>30%</td>
<td></td>
<td></td>
<td>47%</td>
</tr>
<tr>
<td>Park close to work in reserved carpool spaces</td>
<td>10%</td>
<td>55%</td>
<td>30%</td>
<td></td>
<td></td>
<td>42%</td>
</tr>
<tr>
<td>Help decrease air pollution</td>
<td>10%</td>
<td>55%</td>
<td>30%</td>
<td></td>
<td></td>
<td>36%</td>
</tr>
<tr>
<td>Use commute time for productive work</td>
<td>10%</td>
<td>55%</td>
<td>30%</td>
<td></td>
<td></td>
<td>36%</td>
</tr>
<tr>
<td>Wouldn't have to find parking space</td>
<td>10%</td>
<td>55%</td>
<td>30%</td>
<td></td>
<td></td>
<td>42%</td>
</tr>
<tr>
<td>Have companionship during commute</td>
<td>10%</td>
<td>55%</td>
<td>30%</td>
<td></td>
<td></td>
<td>36%</td>
</tr>
</tbody>
</table>

Key Finding:
Dependability, avoiding traffic congestion, time savings, and cost savings are all very important to ridesharers when considering their commuting options. These factors were also very important in their decision to rideshare.

The classic attributes - prime motivators for long-distance commuters - seem to trump other benefits realized in long-distance commuting such as companionship, personal time, work time during the commute.

Strategic Implication:
Start with these leading benefits when promoting ridesharing.

Obstacles Ridesharers Had To Overcome To Start Ridesharing
Two-thirds of Ridesharers Said They Had To Overcome Hurdles In Deciding To Rideshare

- Encountered no hurdles: 36%
- Other hurdles: 64%

Q24(Rideshare): What were the biggest obstacles in making your decision to rideshare?

Older Commuters, Those Living in the Area Longer, and Those with More Commuting Experience Are Less Likely to Face Obstacles in Deciding to Rideshare

- Age: Under 40: 15%, 40-54: 30%, 55 and older: 55%
- Years in Area: Less than 5: 15%, 5-19: 25%, 20 or more: 60%
- Years Commuting to NOVA: Less than 5: 19%, 5-19: 36%, 20 or more: 44%

The inverse encountered hurdles

The Biggest Hurdle Experienced By Rappahannock-Rapidan Ridesharers Is Finding a Car/Vanpool (recall 53% said they are vanpoolers)

- Finding a car/vanpool: 19%
- Finding someone with same hours: 13%
- Not knowing anyone: 8%
- Ride list not updated: 6%
- Work hours: 5%
- Other responses: 3%
- None in particular: 6%

“Optimal matching issues”

Biggest Obstacles to Overcome When Deciding to Rideshare: Knowing Someone Going Their Way and Need for Flexibility

- Didn’t know anyone going my way to work: 25%
- Needed flexibility: 12%
- Liked riding alone: 10%
- Didn’t like riding with strangers: 9%
- Didn’t think I could save much money: 6%
- Didn’t think I could reduce my commute time: 6%
- More than a third experienced no obstacles in deciding to Rideshare.

Not surprisingly, those who have been commuting to NOVA for more than 15 years saw this as less of an obstacle. Those with lower incomes were more likely to like riding alone.

More than a third of Ridesharers Said They Had To Overcome Hurdles In Deciding To Rideshare

Q24(Rideshare): What were the biggest obstacles in making your decision to rideshare?
There Is No “Single Solution” for Overcoming Obstacles to Ridesharing

Commuter Connection Is Not Cited As A Major Force

<table>
<thead>
<tr>
<th>Hurdle</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use car/vanpool</td>
<td>4%</td>
</tr>
<tr>
<td>Still trying to find someone</td>
<td>9%</td>
</tr>
<tr>
<td>Perseverance/kept asking</td>
<td>4%</td>
</tr>
<tr>
<td>Found someone</td>
<td>6%</td>
</tr>
<tr>
<td>Use Commuter Connections</td>
<td>6%</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>1%</td>
</tr>
<tr>
<td>Changed work hours</td>
<td>1%</td>
</tr>
<tr>
<td>Drive by myself</td>
<td>1%</td>
</tr>
<tr>
<td>Other responses</td>
<td>3%</td>
</tr>
<tr>
<td>No hurdles</td>
<td>1%</td>
</tr>
</tbody>
</table>

Opportunity

Slightly Less Than Half of Ridesharers Had to Find A Way To Attend to Personal Matters Requiring Transportation During the Day

<table>
<thead>
<tr>
<th>Number of Days</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>15%</td>
</tr>
<tr>
<td>One</td>
<td>11%</td>
</tr>
<tr>
<td>Two</td>
<td>2%</td>
</tr>
<tr>
<td>Three</td>
<td>1%</td>
</tr>
<tr>
<td>Four</td>
<td>1%</td>
</tr>
<tr>
<td>Five</td>
<td>1%</td>
</tr>
</tbody>
</table>

Q25(Rideshare): What was your single biggest hurdle and how did you overcome this hurdle? [OPENEND]

Key Finding:
Ridesharing takes work. Two-thirds of existing ridesharers said they had to overcome hurdles in trying to rideshare. The biggest hurdles are finding a carpool or vanpool rider - a person to share the ride - and maintaining flexibility.

Strategic Implication:
Reinforce the available ride matching services in all promotional outreach. Reinforce “flexibility” in that ridesharing does not have to be 5 days a week.
There is a high level of awareness of many local commuter assistance services among ridesharers. Not everyone used ride matching assistance services despite the fact that finding a fellow ridesharer is the number one hurdle. Only 39% of current ridesharers used ride matching service.

- Awareness of matching service:
  - Vanpool 69%
  - Carpool 65%
  - Call this 67%

- Usage of matching service (of those aware):
  - Vanpool 58%
  - Carpool 57%
  - Call this 58%

- Total number of ridesharers use services:
  - 67% aware \times 58\% = 39%
There is also a high level of awareness of many Northern Virginia/Metro DC services among ridesharers.

There is also a high level of usage among those who are aware.

About half of the ridesharers from Rappahannock-Rapidan received help from Commuter Connections.

Ridesharers also receive some support from employers.
**Key Finding:**
Ridesharer organizations are serving a need. Existing ridesharers are aware of and turn to rideshare services and rideshare service organizations - both local (PDC) services and Northern Virginia / Metro D.C.-based services.

“Commuter Connections” (COG) clearly receives the most credit for providing assistance - half say they helped. Only a few cited “Commuter Services” (13%) as providing help. Ridesharers also receive some support from their employer with 62% having flexible work hours and 41% having compressed work weeks.

While ridesharers say finding someone to ride with was their biggest hurdle, only 39% used ride matching services.

**Strategic Implication:**
Showcase your impact! Find ways to get Commuter Services’ name out front for greater recognition. Aggressively promote availability of local PDC ride-matching services to suggest that there is a large local database even though the matching happens through COG.

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**86% of commuters from Rappahannock-Rapidan PDC are SOVers.**

Who are the best prospects within this large group to target? There are two ways to examine opportunity ...

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**Option 1:**
4 in 10 SOVers Have Participated in a Ridesharing Arrangement in the Past

<table>
<thead>
<tr>
<th>Participation</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>43%</td>
<td>57%</td>
</tr>
</tbody>
</table>

Recall: SOV is someone who currently commutes by themselves (i.e., drives alone) to or through Northern Virginia at least 3 days a week
Option 2: Half of SOVers (52%) Are Likely to Consider Ridesharing in the Future

Key Finding:
42% of SOVers say they have participated in a ridesharing arrangement in the past. And, over half of current SOVers would consider ridesharing in the future - 25% even say they are very likely!

Strategic Implication:
Although past behavior (rideshare in past) can be used as an indicator of future likelihood to rideshare, those who actually say they are likely to rideshare in the future may represent the “easiest” to convert since they are already open to the idea of ridesharing and have experience with it - just not 3 days or more a week. Target marketing efforts to this group. The remainder of this report will start this process by bringing this group of “Likely Ridesharers” to life.

Respondent Profile: “Likely Ridesharers”

 Likely Ridesharers Have A Great Deal of Rideshare-Related Experience

![Graph showing the percentage of likely ridesharers with a great deal of rideshare-related experience in various categories.]

Q20(Rideshare) & Q17(Rideshare): Usage of service... [ASKED ONLY OF THOSE THAT SAID THEY ARE AWARE]
**Across Most Traditional Demographic Measures**

There Are No Striking Differences Between Current Ridesharers And SOVers Likely to Rideshare

<table>
<thead>
<tr>
<th>SOVers who are likely to rideshare</th>
<th>SOVers who are not likely to rideshare</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sex</td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>51%</td>
</tr>
<tr>
<td>Female</td>
<td>49%</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
</tr>
<tr>
<td>Under 34</td>
<td>10%</td>
</tr>
<tr>
<td>35-54</td>
<td>68%</td>
</tr>
<tr>
<td>55 and over</td>
<td>22%</td>
</tr>
<tr>
<td>Income</td>
<td></td>
</tr>
<tr>
<td>Less than $50,000</td>
<td>4%</td>
</tr>
<tr>
<td>$50,000-$99,999</td>
<td>49%</td>
</tr>
<tr>
<td>$100,000-$149,999</td>
<td>37%</td>
</tr>
<tr>
<td>$150,000 and over</td>
<td>10%</td>
</tr>
</tbody>
</table>

**SOVers in Rappahannock-Rapidan - Whether They Plan to Rideshare or Not - Are More Likely to Be Employed by Private Industry and Less Likely to Be Employed by the Federal Government than Are Ridesharers**

<table>
<thead>
<tr>
<th>Employer</th>
<th>SOVers who are likely to rideshare</th>
<th>SOVers who are not likely to rideshare</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td>32%</td>
<td>30%</td>
</tr>
<tr>
<td>Administrative</td>
<td>23%</td>
<td>13%</td>
</tr>
<tr>
<td>Technical</td>
<td>18%</td>
<td>28%</td>
</tr>
<tr>
<td>Analytical</td>
<td>14%</td>
<td>17%</td>
</tr>
<tr>
<td>Customer Service</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Sales</td>
<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
<td>16%</td>
</tr>
</tbody>
</table>

**SOVers in Rappahannock-Rapidan Who Are Likely to Rideshare in the Future Are More Likely to Be Newcomers; Understandably, They Tend To Spend More On Commuting**

**Length of Commute for SOVers and Ridesharers Does Not Vary Dramatically for Rappahannock-Rapidan Commuters - But, There Are Differences in the Routes They Travel**

| Rout
type | Length of commute | Ridesharers | SOVers who are likely to rideshare | SOVers who are not likely to rideshare |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>I-395</td>
<td>2 hours or longer</td>
<td>10%</td>
<td>8%</td>
<td>1%</td>
</tr>
<tr>
<td>I-495</td>
<td>1 - 2 hours</td>
<td>81%</td>
<td>80%</td>
<td>75%</td>
</tr>
<tr>
<td>Rt. 28</td>
<td>30 min. - 1 hour</td>
<td>8%</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td>Rt. 23</td>
<td>Less than 30 min</td>
<td>0%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>I-66</td>
<td>Routes Travel</td>
<td>68%</td>
<td>79%</td>
<td>72%</td>
</tr>
<tr>
<td>Rt. 23</td>
<td>1.49S</td>
<td>15%</td>
<td>74%</td>
<td>70%</td>
</tr>
<tr>
<td>Rt. 23</td>
<td>1.39S</td>
<td>21%</td>
<td>3%</td>
<td>9%</td>
</tr>
<tr>
<td>Rt. 23</td>
<td>1.95S</td>
<td>9%</td>
<td>9%</td>
<td>6%</td>
</tr>
</tbody>
</table>
Key Finding:
In the Rappahannock-Rapidan PDC region, potential future converts to ridesharing may represent a "second wave" of ridesharers in that they differ in some ways from current ridesharers. Newcomers show a greater likelihood of converting to ridesharing. SOVers who are most likely to convert to ridesharing also tend to be concentrated in private industry jobs, unlike current ridesharers from the region who tend to be more government sector workers. Rideshare prospects use I-66, just like current ridesharers, and these likely ridesharers may also include Rt. 28 and Rt. 29 on their commute more than do current ridesharers.

Strategic Implication:
There may be a new wave or "next generation" of ridesharers coming - newcomers to the area in private industry jobs. Newer residential developments that use Rt. 29 or Rt. 28 headed into Northern Virginia may offer targeting opportunities.

Recall that Commute Decisions for Ridesharers Can Be Divided into Three Tiers

- **Top Tier Factors:**
  - Dependability of commute
  - Time it would take to get to work
  - Cost
  - Time it would take to get home
  - Safety
  - Ease of commute
  - Level of stress

- **Middle Tier Factors:**
  - Morning departure time
  - Flexibility to arrive and leave when work
  - Concern about being stranded at work
  - Better use of commute time
  - Convenience
  - Impact on environment

- **Lower Tier Factors:**
  - Having time alone
  - Ability to make stop/run errands
  - Ability to make work-related trips

Among SOVers, the attitudes of those likely to rideshare in the future more closely mirror those of current rideshare than they do other SOVers.

Likely Ridesharers’ Attitudes about Commuting and Ridesharing

**Top Tier Factors:**
Likely Ridesharers Share Similar Opinions As Current Ridesharers On Many Factors

**Note:** Percentages indicate those who rated each factor a "4" or a "5".
Middle Tier Factors:
SOVers Likely to Rideshare May Have More Sensitivity To Impact on the Environment, But It Is Not A Leading Factor

NOTE: Percentages indicate those who rated each factor a "4" or a "5".

<table>
<thead>
<tr>
<th>Factor</th>
<th>Likely</th>
<th>Not Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flexibility to arrive and leave at leisure</td>
<td>4%</td>
<td>96%</td>
</tr>
<tr>
<td>Morning departure time</td>
<td>5%</td>
<td>95%</td>
</tr>
<tr>
<td>Concern about being stranded</td>
<td>7%</td>
<td>93%</td>
</tr>
<tr>
<td>Better use of commute time</td>
<td>9%</td>
<td>91%</td>
</tr>
<tr>
<td>Convenience</td>
<td>11%</td>
<td>89%</td>
</tr>
<tr>
<td>Impact on environment</td>
<td>19%</td>
<td>81%</td>
</tr>
</tbody>
</table>

Lower Tier Factors:
Those Who Say They Are Not Likely to Rideshare Clearly Need More "Control"

NOTE: Percentages indicate those who rated each factor a "4" or a "5".

<table>
<thead>
<tr>
<th>Factor</th>
<th>Likely</th>
<th>Not Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ability to make other stops during commute</td>
<td>2%</td>
<td>98%</td>
</tr>
<tr>
<td>Ability to make work-related trips</td>
<td>11%</td>
<td>89%</td>
</tr>
<tr>
<td>Time alone</td>
<td>6%</td>
<td>94%</td>
</tr>
</tbody>
</table>

When Asked “What If” Ridesharing Becomes an Option, Likely Ridesharers Tend to Look More Like Current Ridesharers Than Other SOVers on Factors of Most Importance in the Commute Decision - Save Time, Money, Less Stressed

NOTE: Percentages indicate those who rated each factor a "4" or a "5".

<table>
<thead>
<tr>
<th>Factor</th>
<th>Likely</th>
<th>Not Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avoid some of the traffic congestion</td>
<td>7%</td>
<td>93%</td>
</tr>
<tr>
<td>Save time by using HOV lanes</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>Lower my transportation costs</td>
<td>13%</td>
<td>87%</td>
</tr>
<tr>
<td>Be less stressed</td>
<td>17%</td>
<td>83%</td>
</tr>
</tbody>
</table>

On Attributes of Lesser Importance, Prospects May See Greater Benefits in Using The Commute Time & Helping The Environment Than Do Current Ridesharers

NOTE: Percentages indicate those who rated each factor a "4" or a "5".

<table>
<thead>
<tr>
<th>Factor</th>
<th>Likely</th>
<th>Not Likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use commute time for personal time</td>
<td>11%</td>
<td>89%</td>
</tr>
<tr>
<td>Use commute time for productive work</td>
<td>12%</td>
<td>88%</td>
</tr>
<tr>
<td>Help decrease air pollution</td>
<td>16%</td>
<td>84%</td>
</tr>
<tr>
<td>Qualify for transportation financial support</td>
<td>17%</td>
<td>83%</td>
</tr>
<tr>
<td>Park close to work in reserved carpool spaces</td>
<td>18%</td>
<td>82%</td>
</tr>
<tr>
<td>Wouldn't have to find parking space</td>
<td>20%</td>
<td>80%</td>
</tr>
<tr>
<td>Have companionship during commute</td>
<td>22%</td>
<td>78%</td>
</tr>
</tbody>
</table>
Key Finding:
Attitudinally, likely ridesharers look a lot like current ridesharers. Dependability, control (avoid traffic congestion), time savings, and cost savings are all very important considerations/benefits to ridesharers when assessing their commuting options. While they are less important benefits than saving time and money, prospects may place greater perceived value in using the commute time for personal or work-related matters and helping the environment than current ridesharers do.

Strategic Implication:
Focus messaging on the leading key benefits. You will not only attract primary prospects, you will also reinforce the decision of current ridesharers. Include other perceived benefits as secondary messages.

Personal Issues Inhibiting Likely Ridesharers

Understanding key benefits of ridesharing - saving time and money
Inconvenience of being in a vanpool or carpool - having to pick up people
Need for a car during the day

Appreciation of Time-saving Benefit?
The Amount of Time Savings Does Not Have To Be Huge for the Opportunity Target To Consider Ridesharing

Q23(SOV): How much time would you have to save to consider ridesharing with another person or group of people on your current commute to work?

- 0% 20% 40% 60% 80% 100%
- 46 minutes or more
- 31-45 minutes
- 16-30 minutes
- 1-15 minutes
- None
- 41%
- 21%
- 11%
- 7%
- 4%
- 34%

Not Likely Likely

5 Out of 10 SOVers Ride on Roads with HOV Lanes and Say That They Could Save Time If They Were Ridesharing (By Qualifying for HOV Lanes)

Q25(SOV): If you qualified for HOV lanes, would your commute time be shorter?

- Yes 53%
- No 30%
- Do not have HOV lanes 17%

Likely Not Likely

More than Half Believe They Could Save a Minimum of 20 Minutes

Q26(SOV): How many minutes do you think you would save on your current commute to work if you qualified for HOV lanes?

- 30 or more
- 20-29 minutes
- 11-19 minutes
- 10 minutes or less
- None
- 40%
- 18%
- 18%
- 18%
- 18%
- 16%

Likely Not Likely

Key Finding:
While time savings is one of the major benefits that motivate current ridesharers and seemingly has very high appeal to prospective ridesharers, the amount of time saving does not have to be great.

Interestingly, many SOVers (58%) say they already know they could save 20 minutes or more if they had a ridesharing arrangement (and would qualify for HOV Lanes).

Strategic Implication:
Time saving is not a silver bullet message. Communications must advance multiple benefits.
Appreciation of Money-saving Benefit?

Key Finding:
While money savings is another major benefit that motivates current rideshares and seemingly has very high appeal to prospective ridesharers, the amount of money savings does not have to be great.

Strategic Implication:
Savings on transportation cost, like time savings, is not the silver bullet message. Communications must advance multiple benefits at the same time.

Inconvenience of being in a car or vanpool - picking people up ... going out of your way
Those Who Say They Are Likely to Rideshare in the Future Are Willing to Drive Further Out of Their Way to Pick Up Someone on Their Way to Work

Q34(SOV): How many miles would you be willing to travel out of your way to pick up someone who could rideshare with you on your way to work?

- None: 7%
- 1 or 2 miles: 11%
- 3 or 4 miles: 9%
- 5 miles: 16%
- 6 or more: 12%

Non-Likely: 50%
Likely: 50%

Those Likely to Rideshare Are Also Willing to Spend More Time Picking Up Someone on Their Way to Work

Q34(SOV): How many minutes would you be willing to travel out of your way to pick up someone who could rideshare with you on your way to work?

- None: 5%
- 1-5 minutes: 9%
- 6-10 minutes: 24%
- 11 minutes or more: 10%

Non-Likely: 0%
Likely: 100%

They Are Also Willing to Drive More Miles Out of Their Way to Drop Off Someone

Q35(SOV): How many miles would you be willing to travel out of your way to your work place to drop off someone who could rideshare with you?

- None: 4%
- 1 or 2 miles: 21%
- 3 or 4 miles: 9%
- 5 to 9 miles: 30%
- 10 or more: 16%

Non-Likely: 9%
Likely: 91%

And They Would Be Willing to Spend More Time to Drop Off Someone

Q35(SOV): How many minutes would you be willing to travel out of your way to your work place to drop off someone who could rideshare with you?

- None: 0%
- 1-5 minutes: 13%
- 6-10 minutes: 35%
- 11 minutes or more: 11%

Non-Likely: 0%
Likely: 100%
Key Finding:
Prospective ridesharers are more than willing to go out of their way or add time to their commute as part of a ridesharing arrangement.

Strategic Implication:
This is not a major hurdle that needs to be addressed.
Key Finding:
Ridesharers are just slightly less dependent on their cars during the day than SOVers to take care of personal matters.

Strategic Implication:
This, too, does not appear to be a major hurdle that needs to be addressed.

Infrastructure Issues That Support /Inhibit Likely Ridesharers

Infrastructure Issues

- Awareness of park and ride lots
- Knowing someone to commute with
- Awareness of local- and Metro DC-based ridesharing services and organizations
- Awareness of local- and Metro DC-based specific rideshare assistance services
- Usefulness of ridesharing information

Knowing where convenient Park & Ride lots are located
A Convenient Park & Ride Lot is Not An Obstacle, As Over 60% of SOVers Are Aware of a Convenient Park & Ride Lot

Knowing someone to commute with

Only a Third of SOVers Said That They Know Someone Who Makes a Commute Similar to Theirs

“Not Knowing With Whom to Ride” Is The Top Reason Likely-to-Rideshare Prospects Give When They Explain Why They Are Not Currently Ridesharing
Awareness of ridesharing services and organizations

Those Likely to Rideshare Were More Likely to Have Heard Mention of Commuter Assistance Services than Were Other SOVers

But Still 39% Are Unaware

Those Likely to Rideshare Are Less Likely to Be Aware of Each Organization Than Current Ridesharers

Usefulness of information
Only 20% of Those Who Say They Are Likely to Rideshare in the Future Say the Information Is Very Useful
49% Say Somewhat Useful

Q14(Rideshare) & Q15(SOV): Thinking about the information you saw or heard, how useful was that information?

<table>
<thead>
<tr>
<th>Not at all useful</th>
<th>Not very useful</th>
<th>Somewhat useful</th>
<th>Very useful</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>7%</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>0%</td>
<td>26%</td>
<td>37%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Awareness of specific assistance services

There Are Few Differences Between All Commuters When It Comes to Awareness of Metro DC Services

<table>
<thead>
<tr>
<th>Service</th>
<th>Not Likely</th>
<th>Likely</th>
<th>Rideshare</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOV Lanes</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Commuter Rail (VRE)</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Metrobus Service (Subway)</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Park &amp; Ride Lots</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Guaranteed Ride Home Program</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Metrobus Service (Local bus)</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Long-distance Commuter Bus Services</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Telework (Telecommuting)</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Bicycle paths/trails</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Employer support services</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>511 Virginia</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Likely Ridesharers in Rappahannock-Rapidan Are Less Aware of Almost All Local Services Than Ridesharers, Especially Local Matching Assistance

Q16(Rideshare) & Q19(HOV): What local commuter assistance services are you aware of in the area where you live?

<table>
<thead>
<tr>
<th>Service</th>
<th>Not Likely</th>
<th>Likely</th>
<th>Rideshare</th>
</tr>
</thead>
<tbody>
<tr>
<td>Park &amp; Ride Lots</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Guaranteed Ride Home Program</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Commuter Rail (VRE)</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Metrocheck Commuter Subsidy</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Vanpool Matching Assistance Program</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Carpool Matching Assistance Program</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Telework (Telecommuting)</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Long-distance Commuter Bus Services</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Vanpool Start-up Assistance Program</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>Bicycle paths/trails</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
<tr>
<td>511 Virginia</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
</tbody>
</table>
Key Finding:
SOV Commuters, for the most part, are aware of Park & Ride lots but most (68%) don’t know anyone to share a ride with. Most (65%) are aware of Commuter Connections vs. the PDC’s Commuter Services (12% aware). Not surprisingly, most likely ridesharing are more aware of Northern Virginia/Metro DC-based rideshare services than the local-based (PDC) ridesharing services. In fact, only a quarter (28%) of likely ridesharers are aware of local vanpool matching services and 4 in 10 (41%) are aware of carpool matching.

While many (61%) recall seeing or hearing about ridesharing information, only 20% say the information was very useful.

Strategic Implication:
Build awareness of local Commuter Services and the availability of local ride matching services (even though it is actually performed by Commuter Connections). Present the simplicity of finding a match. Encourage people to register on the database so successful matching can take place. Make marketing information more compelling and relevant. Try to personalize the service.

SOVers Are Much More Likely to Be Offered Free Parking; Ridesharers Are Much More Likely to Be Offered Transit Fare Subsidies & Preferential Parking

Indeed, When Asked to Describe Their Parking Arrangement at Work, 8 out of 10 SOVers Say Their Worksite Has Free Parking
Likely-to-Rideshare SOVers Have Employer Transportation Programs More Like Other SOVers than Ridesharers

61% of Ridesharers Say Employer Offers Metrocheck
And 41% Have Compressed Workweek

11% of Unlikely to Rideshare
4% of Likely to Rideshare
5% of Rideshare

Key Finding:
Likely ridesharers vs. current ridesharers tend to work for private companies that offer free parking and fewer ridesharing support services such as Metrocheck and compressed work weeks. However, likely ridesharers say their companies do offer flexible work hours, perhaps one precursor or facilitator to making rideshare arrangements at a private employment site.

Strategic Implication:
Focus on things on which you can have an impact, as previously mentioned. But mention these employer-based services in promotional materials and suggest that likely-to-rideshare targets should ask their employers about these programs and services (i.e., transit fare or even compressed work week, especially in a tight labor market).

Telecommuting

Q26(Rideshare): Now we want to ask you about telecommuting, also called teleworking. For purposes of this survey, “telecommuters” are defined as: “Wage and salary employees who at least occasionally work at home or at a telework or satellite center all day during their normal working hours.” Based on this definition, are you a telecommuter?
Nearly 1 Out of 5 Ridesharers Are Also Telecommuters

Q26(Rideshare): How often do you usually telecommute?

SOV Telecommuters Do So More Often than Rideshare Telecommuters

This Level Of Telework Activity Is Consistent With Self-reported Commute of At Least 5 Days a Week

Q1(SOV): Typically, how many days a week do you commute to work in or through Northern Virginia?
Of Those Who Do Not Telecommute, a Third Say that Their Job Responsibilities Would Allow Them To Do So

<table>
<thead>
<tr>
<th></th>
<th>SOVers</th>
<th>Ridesharers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>36%</td>
<td>34%</td>
</tr>
<tr>
<td>No</td>
<td>63%</td>
<td>66%</td>
</tr>
</tbody>
</table>

Q28(Rideshare) & Q45(SOV): Do your job responsibilities allow you to work at a location other than your main work place (i.e. home or telework center) at least occasionally?

SOVers and Ridesharers Are Both Very Likely to Say that they Would Start Telecommuting if Their Employer Allowed It

<table>
<thead>
<tr>
<th></th>
<th>SOV</th>
<th>Rideshare</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;5&quot;—Very likely</td>
<td>74%</td>
<td>73%</td>
</tr>
<tr>
<td>&quot;4&quot;</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>&quot;3&quot;</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>&quot;2&quot;</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>&quot;1&quot;—Not very likely</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Q29(Rideshare) & Q46(SOV): If your employer were to allow telecommuting, how likely would you be to start telecommuting in the future? [ASKED ONLY OF THOSE THAT SAY THEY DO NOT CURRENTLY TELECOMMUTE, BUT THAT THEIR EMPLOYMENT RESPONSIBILITIES WOULD ALLOW IT]

Key Finding:
Telecommuting impacts the number of potential ridesharers and rideshare prospects. On the days when they are not traveling to their main place of work, SOVers are slightly more likely to be telecommuters. They also telecommute more often than ridesharers. There is no difference, however, between SOVers and ridesharers on whether or not their jobs would allow them to telecommute and whether or not they would be likely to do so if their employer allowed it.

Strategic Implication:
Since SOVers are more likely to telecommute than ridesharers, they may feel that they don’t have a need for a formal ridesharing arrangement on the days that they are going to their main place of work. While it unfortunately reinforces their need for flexibility, encourage it as it does reduce vehicle miles traveled. Co-opt it and make it part of the “ridesharing mentality”...”If you telecommute some days, you can easily carpool others.”

Communication Vehicles To Advance Ridesharing
Ridesharers and SOVers Read Both Local Newspapers and the Washington Post

Ridesharers & SOVers Listen To Local Stations and WTOP The Most

Almost All Ridesharers and SOVers Have Internet Access

Monthly Newsletter on Commuter Assistance Programs Has Mass Appeal
Key Finding:
Ridesharers and SOVers both utilize both local and Washington market media. Both groups have access to the Web at home and work. And, a monthly online commuter newsletter holds great appeal.

Strategic Implication:
Consider local media over the relatively higher cost of Washington market media. Use of local media also reinforces “local service.” Explore online newsletter as an inexpensive, customized marketing vehicle. Look for ways to make it relevant and meaningful like tying it to I-66 updates, the most heavily used corridor among those most likely to rideshare.
Key Take-A-Ways From This Study

Insights Learned About Ridesharers

1. Who Are Current Ridesharers: They tend to be people who have lived in the PDC for some time and have commuted a long distance for years to government jobs. Half earn over $100K annually. Most of these ridesharers commute for 1-2 hours each way (70%) and are most likely to travel on I-66 during their commute (68%) in vanpools or carpools with multiple riders (not just one other rider).

2. Why They Rideshare: Lowering transportation costs, avoiding traffic congestion, and saving time by using HOV Lanes are the primary motivators in their decision to Rideshare. They realize significant savings every week.

3. Obstacles They Had To Overcome: Two-thirds of existing ridesharers said they had to overcome hurdles in trying to rideshare. The biggest hurdles are finding a carpool or vanpool rider – a person to share the ride - and maintaining flexibility.

Key Take-A-Ways (Cont.)

Insights Learned About Current Ridesharers

4. Rideshare Services Helped Make Ridesharing Easier: Rideshare organizations are serving a need. Existing ridesharers are aware of and turn to rideshare services and rideshare service organizations - to both local (PDC) services and Northern Virginia / Metro D.C.- based services.

5. The PDC’s Commuter Services Has A Low Profile: “Commuter Connections” (COG) receives the most credit for providing assistance - half say they helped. Only a few cited “Commuter Services” (13%) as providing help in ridesharing.

6. Employers Play A Role: Ridesharers also receive some support from their employers with 22% having flexible work hours and 41% having compressed work weeks.

7. Ride Matching is Not Widely Used: While ridesharers say finding someone to ride with was their biggest hurdle, only 39% say they used ride-matching services.

Key Take-A-Ways (Cont.)

Insights Learned About Best Rideshare Prospects -

8. Ridesharing Opportunity: There may be up to 25,000 SOVers from the PDC who travel to or through Northern Virginia on work commutes (based on facts from other, unrelated studies applied to some findings from this study).

9. Primary Target: 52% of SOVers say they are “somewhat” or “very” likely to consider ridesharing sometime in the future. In the Rappahannock-Rapidan PDC region, potential future converts to ridesharing may represent a “second wave” of ridesharers in that they differ in some ways from current ridesharers. Newcomers show a greater likelihood of converting to ridesharing. SOVers who are most likely to convert to ridesharing also tend to be concentrated in private industry jobs, unlike current ridesharers from the region who tend to be more government sector workers. Rideshare prospects use I-66, just like current ridesharers, and these likely ridesharers may also include Rt. 28 and Rt. 29 on their commute more than do current ridesharers.

10. Key Perceived Motivating Benefits: Lowering transportation costs, avoiding traffic congestion, and saving time by using HOV Lanes are the most important benefits prospects see in considering ridesharing modes. Unlike existing ridesharers, however, these prospects see other benefits they could seemingly realize in long distance rideshare arrangements - companionship, personal time & work time during the commute, and reducing impact on the environment.

11. Conversion Requires More Than Appreciation of Personal Benefits: Time savings is one of the major benefits that motivate current ridesharers. This benefit is also cited by prospective ridesharers as a major motivator. However, the amount of time saving does not have to be great. Interestingly, many SOVers (58%) say they already know they could save 20 minutes or more if they had a ridesharing arrangement (and would qualify for HOV Lanes). While money savings is another major benefit that motivates current ridesharers and seemingly has very high appeal to prospective ridesharers, the amount of money savings does not have to be great.
12. Non-Barrier: Accommodating Others Is Not Perceived As A Big Deal. Nor is Need For Car During The Day: Prospective ridesharers are more than willing to go out of their way or add time to their commute as part of a ridesharing arrangement. Only a third of SOVers say they need their car one day during the week to run errands at lunch. Half say they don’t need it at all.

13. The Biggest Hurdle – Finding Someone To Ride With: For the most part, prospects are aware of Park & Ride lots but most (68%) don’t know anyone to share a ride with.

14. Little Awareness Exists of Commuter Services: Most can recall seeing or hearing information about ridesharing, but 39% do not. Of those who recall seeing or hearing about ridesharing information, only 20% say the information was very useful.

15. There is Little Awareness of the PDC’s “Commuters Services” and Local Ride Matching: 65% are aware of Commuter Connections vs. 12% for the PDC’s Commuter Services. Not surprisingly, most likely ridesharers are more aware of Northern Virginia/Metro DC-based rideshare-specific services than the local based (PDC ) ridesharing services. In fact, only a quarter (28%) of likely ridesharers are aware of local vanpool matching services and 4 in 10 (41%) are aware of carpool matching.

16. Telecommuting Impacts Ridesharing: Since SOVers are more likely to telecommute than ridesharers, they may feel that they don’t have a need for a formal ridesharing arrangement on the days that they are going to their main place of work.

17. Target Audiences Can Be Reached Locally and Inexpensively: Ridesharers and SOVers both utilize both local and Washington market media. Both groups have access to the Web at home and work. And, a monthly online commuter newsletter holds great appeal.

Appendices

Relative Appeal of Existing & New Rideshare Support Services
Guaranteed Ride Home

Relative appeal of this base concept

Q40(SOV): How likely would you be to rideshare if you had a free service that would guarantee you a ride home "for free" if you missed your car or vanpool ride home or had to handle an emergency?

About Half of SOVers Say that They Would Rideshare if They Were Guaranteed a Free Ride Home if They Missed Their Car/Vanpool

Women, those who say they are likely to rideshare in the future, and those aged 55 and older are more likely to say that they are "very likely" to use this service.

Online Ride-Matching Service

To Match You With a Rideshare Partner

Women, those who say they are likely to rideshare in the future, and those who have rideshared in the past are more likely to say that they are "very likely" to use this service.
Government-Sponsored Regional Database to Match You With a Rideshare Partner

Q36(SOV): How likely would you be to use a government-sponsored commuter assistance agency to place your name on a regional database that matches people who commute to the same area in Metro Washington as you do?

- "1"—Not very likely
- "2"—Somewhat likely
- "3"—Likely
- "4"—Very likely
- "5"—Very very likely

All SOVers

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;1&quot;—Not very</td>
<td>37%</td>
</tr>
<tr>
<td>&quot;2&quot;—Somewhat</td>
<td>14%</td>
</tr>
<tr>
<td>&quot;3&quot;—Likely</td>
<td>17%</td>
</tr>
<tr>
<td>&quot;4&quot;—Very likely</td>
<td>18%</td>
</tr>
<tr>
<td>&quot;5&quot;—Very very</td>
<td>12%</td>
</tr>
</tbody>
</table>

Women, those 55 and older, those who say they are likely to rideshare in the future, and those who have rideshared in the past are more likely to say that they are "very likely" to use this service.

Employer-Sponsored Service To Match You With a Fellow Employee Traveling Their Same Route

Q38(SOV): How likely would you be to use a ride-matching service offered by your employer to match you with a fellow employee who lives in your area, and like you, commutes to or through Northern Virginia?

- "1"—Not very likely
- "2"—Somewhat likely
- "3"—Likely
- "4"—Very likely
- "5"—Very very likely

All SOVers

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;1&quot;—Not very</td>
<td>23%</td>
</tr>
<tr>
<td>&quot;2&quot;—Somewhat</td>
<td>10%</td>
</tr>
<tr>
<td>&quot;3&quot;—Likely</td>
<td>23%</td>
</tr>
<tr>
<td>&quot;4&quot;—Very likely</td>
<td>20%</td>
</tr>
<tr>
<td>&quot;5&quot;—Very very</td>
<td>24%</td>
</tr>
</tbody>
</table>

Women, those 55 and older, those who say they are likely to rideshare in the future, and those who have rideshared in the past are more likely to say that they are "very likely" to use this service.

Relative Appeal Based On Ridematching Database Sponsor

Best Rideshare Prospects

<table>
<thead>
<tr>
<th>Type of Program</th>
<th>5 Rating (Very Likely)</th>
<th>4 Rating (Somewhat Likely)</th>
<th>Total Top Two Boxes (4 &amp; 5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>19%</td>
<td>15%</td>
<td>34%</td>
</tr>
<tr>
<td>Government-Sponsored</td>
<td>20%</td>
<td>16%</td>
<td>36%</td>
</tr>
<tr>
<td>Employee-Sponsored</td>
<td>24%</td>
<td>20%</td>
<td>44%</td>
</tr>
</tbody>
</table>

Rewards Program

Rideshare Incentives For Every trip (NuRide Concept)

Q40(Rideshare): Suppose that some time in the future, you needed to make new rideshare arrangements. How likely would you be to register for a ridesharing program through which you could earn points that could be redeemed toward rewards every time you share a ride? To register for this program, you register your trip online to find a rideshare partner. You can use the program for either work or non-work trips.
Rideshare Incentives Rewards Program

A Rewards Program For Ridesharing Would Receive Varying Levels of Support From Current Ridesharers

Q40(Rideshare): Suppose that some time in the future, you needed to make new rideshare arrangements. How likely would you be to register for a ridesharing program through which you could earn points that could be redeemed toward rewards every time you share a ride? To register for this program, you register your trip online to find a rideshare partner. You can use the program for either work or non-work trips.

<table>
<thead>
<tr>
<th>Likelihood</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not very likely</td>
<td>12%</td>
</tr>
<tr>
<td>Very likely</td>
<td>26%</td>
</tr>
<tr>
<td>Very very likely</td>
<td>17%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>13%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
</tr>
</tbody>
</table>

Rideshare Incentives Rewards Program

SOVers Are Less Likely to Say That They Would Participate in a Rewards Program

Q40 (Rideshare) & Q41(SOV): How likely would you be to rideshare if you could earn points that can be redeemed toward rewards every time you share a ride? To participate in this program, you register your trip online to find a rideshare partner for either a work or non-work trip.

<table>
<thead>
<tr>
<th>Likelihood</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not very likely</td>
<td>26%</td>
</tr>
<tr>
<td>Very likely</td>
<td>17%</td>
</tr>
<tr>
<td>Very very likely</td>
<td>12%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>13%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
</tr>
</tbody>
</table>

Women SOVers and SOVers who say they are “very likely” to ride share in the future are more likely to say that they are “very likely” to use this service.

Rideshare Incentives Rewards Program

Ridesharers Would Be More Likely to Participate in a Rewards Program if it Were Managed by a Government-Sponsored Commuter Assistance Agency

Q41(Rideshare): How likely would you be to register for this program if it were managed by…?

<table>
<thead>
<tr>
<th>Manager</th>
<th>Likelihood</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government-sponsored agency</td>
<td>4.1</td>
<td>1.4</td>
</tr>
<tr>
<td>Your employer</td>
<td>3.5</td>
<td>3.2</td>
</tr>
<tr>
<td>A private company</td>
<td>2.5</td>
<td>2.3</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

Rideshare Incentives Rewards Program

SOVers Would Also Be More Likely to Participate in a Rewards Program if it Were Managed by a Government-Sponsored Commuter Assistance Agency or Their Employer

Q42(SOV): How likely would you be to register for this program if it were managed by…?

<table>
<thead>
<tr>
<th>Manager</th>
<th>Likelihood</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government-sponsored agency</td>
<td>3.3</td>
<td>3.2</td>
</tr>
<tr>
<td>Your employer</td>
<td>3.0</td>
<td>3.0</td>
</tr>
<tr>
<td>A private company</td>
<td>2.8</td>
<td>2.8</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>
Shuttle Service

Long-Distance Shuttle Service
From P&R Lot To Northern Virginia

Q32(SOV): How likely would you be to use a commuter bus service or a shuttle service that would pick you up from a park and ride lot in your home region and would take you to the closest Metro station in Northern Virginia?

A Third of SOVers Say They Would Be Likely to Use a Service That Would Take Them From a Park & Ride Lot to the Closest Metro Station

<table>
<thead>
<tr>
<th>LIKELIHOOD</th>
<th>RESPONSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Likely</td>
<td>14%</td>
</tr>
<tr>
<td>Somewhat Likely</td>
<td>21%</td>
</tr>
<tr>
<td>Neither Likely nor Unlikely</td>
<td>14%</td>
</tr>
<tr>
<td>Not very Likely</td>
<td>21%</td>
</tr>
<tr>
<td>Not at all Likely</td>
<td>30%</td>
</tr>
</tbody>
</table>

Not at all Likely: 30%

Most Say That They Would Be Willing to Pay $5 to $10 Round Trip For This Service

<table>
<thead>
<tr>
<th>PAYMENT RANGE</th>
<th>RESPONSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $5</td>
<td>12%</td>
</tr>
<tr>
<td>$5 to $10</td>
<td>33%</td>
</tr>
<tr>
<td>$11 to $15</td>
<td>10%</td>
</tr>
<tr>
<td>$16 to $20</td>
<td>2%</td>
</tr>
<tr>
<td>$21 to $25</td>
<td>1%</td>
</tr>
<tr>
<td>Over $25</td>
<td>1%</td>
</tr>
</tbody>
</table>

Q33(SOV): How much would you be willing to pay per day (round trip) to use a commuter bus or a shuttle to the closest Metro station or VRE station in Northern Virginia?

Key Finding:

There is a good level of interest among “best SOV prospects” in all of the rideshare support services tested - guaranteed ride home, ridematching, reward incentives (NuRide), and shuttle services. Connecting these services to a commuter’s employer further increases appeal.

Strategic Implication:

Promote the availability of existing products/services. Look for ways to further tie-in employer support. Proceed with incentive program development.
Northern Virginia TDM-Related Issues

**Dulles Metro Rail Expansion**
Awareness & Reaction

**HOT Lanes**
Potential Reactions

---

4 out of 10 Ridesharers Are Aware of the Dulles Metrorail Expansion

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>41%</td>
<td>59%</td>
</tr>
</tbody>
</table>

---

About the Same Amount of SOVers Are Aware

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>46%</td>
<td>54%</td>
</tr>
</tbody>
</table>
9 out of 10 Ridesharers Will Not Change their Current Commute in Response to the Metrorail Expansion

8 out of 10 SOVers Will Not Change Their Commute

7 out of 10 Ridesharers Will Continue to Rideshare After the HOT Lanes Open; A Quarter, However, Aren’t Sure

Key Finding:
Of those that are aware of the Dulles Metrorail Extension, almost all say that they will not change their commute. A quarter of ridesharers, however, don’t know what they will do when the HOT Lanes are available on the Beltway.

Strategic Implication:
HOT Lanes may cannibalize existing rideshare arrangements. Study this issue further. Use the newsletter to remind current ridesharers that there are other benefits to ridesharing (i.e., cost, helping the environment, etc.) than just qualifying for HOV Lanes.
Almost All Ridesharers and SOVers Have Internet Access

Q54(Rideshare) & Q67(SOV): Do you have internet access at home, at work, or on a hand-held device?

Ridesharers with lower incomes and female SOVers are more likely to have no internet access.

About Half of Ridesharers Read Local Newspapers and the Washington Post

Q43(Rideshare): What newspapers, by name, do you read on a regular basis?

Those with income under $75K annually, those new to the area, and those new to commuting were less likely to read newspapers.

SOVers Read The Same Newspapers

Q57(SOV): What newspapers, by name, do you read on a regular basis?

Those with income under $75K annually, those new to the area, and those new to commuting were less likely to read newspapers.
Local Stations and WTOP Are the Most Popular Radio Stations for Both Ridesharers & Prospects

Local Stations

<table>
<thead>
<tr>
<th>Station</th>
<th>Rideshare (%)</th>
<th>SOV (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>WUST (1500 AM)</td>
<td>10%</td>
<td>22%</td>
</tr>
<tr>
<td>WJZW (105.1)</td>
<td>20%</td>
<td>34%</td>
</tr>
<tr>
<td>WPFW (107.3)</td>
<td>30%</td>
<td>51%</td>
</tr>
<tr>
<td>WAVA (90.9)</td>
<td>40%</td>
<td>68%</td>
</tr>
<tr>
<td>WGAY (97.1)</td>
<td>50%</td>
<td>89%</td>
</tr>
<tr>
<td>WJFK (103.5)</td>
<td>60%</td>
<td>96%</td>
</tr>
<tr>
<td>WGMS (98.7)</td>
<td>70%</td>
<td>97%</td>
</tr>
<tr>
<td>WASH (89.3)</td>
<td>80%</td>
<td>99%</td>
</tr>
<tr>
<td>WETA (96.3)</td>
<td>90%</td>
<td>99%</td>
</tr>
<tr>
<td>WMZQ (106.7)</td>
<td>100%</td>
<td>99%</td>
</tr>
<tr>
<td>WTOP-AM (630 AM)</td>
<td>100%</td>
<td>99%</td>
</tr>
</tbody>
</table>

Other

Don't listen to the radio

SOVers Are More Likely to Have Heard the Information on a Radio News Report, But Less Likely to Have Seen it on a Commuter Assistance Web Site

Likely-to-Rideshare SOVers Are More Likely to Have Heard Mention on a Radio News Report; Ridesharers Are More Likely to See Mention on a Commuter Assistance Web Site
**Key Finding:**
Local media can reach Commuter Connections’ targets. Commuter assistance Websites are a viable medium for likely rideshare targets.

**Strategic Implication:**
Consider local media first to avoid the relatively higher cost of Washington market media. Explore online marketing, too.

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**Rappahannock-Rapidan Rideshare Marketing Program**

- **Overall Objective:**
  - Increase number of ridesharers in the Rappahannock-Rapidan PDC

- **Budgetary Resources:**
  - $20K remaining through June 2006

- **Target Audiences:**
  - Current ridesharers
  - Prospective ridesharers
  - Target greatest need/opportunity:
    - Primary: Commuters headed to or through Northern Virginia using I-66 corridor commutes
    - Secondary: Newer residential developments that use Rt. 29 or Rt. 28 headed into Northern Virginia

*Need to identify current modal split and set specific, measurable goals*
Rappahannock-Rapidan Rideshare Marketing Program

- Communications Strategy:
  - Build greater use of ridesharing alternatives to SOV commuting by advancing the travel options, benefits of ridesharing, and availability of local support services.
  - Increase awareness and image of Commuter Services, as well as awareness of local ridematching services (even though it is actually performed by Commuter Connections) by positioning Commuter Services as customized services for the long-distance commuter headed to Northern Virginia.
  - Exaggerate and promote all activities around this position. Find ways to promote the PDC residents’ commutes to Northern Virginia as a big deal and an increasing trend. Reinforce Commuter Services as the hero in making this commute easier for everyone.

Rideshare Marketing Program

- Specific Action Steps:
  - Consider a tagline that reinforces this position: free customized services for the long-distance commuter headed to Northern Virginia.
  - Rough example:

Commuter Service
Helping You Get To Northern Virginia & Back
Culpeper · Fauquier · Madison · Orange · Rappahannock

- Specific Action Steps (Cont.):
  - Create local Commuter Services Website that “pays off” local service, yet still hyper-links to COG services. Use available rideshare copy for easy construction.
  - Create an online monthly “I-66 Commuter newsletter” for affordable ongoing education advancing:
    - Key messages (see key message section)
    - New and existing rideshare support services
    - Compelling testimonials about “best practices” by area commuters
    - Update on construction projects
    - New Park & Ride lot locations
    - Update on future transportation plans
    - Share newsletter development cost with Northern Shenandoah PDC
    - But - PDC Commuter Services signs the newsletter and Website
  - Hyper-link newsletter features directly back to Web site

Rideshare Marketing Program

- Specific Action Steps (Cont.):
  - Use low-cost, guerrilla-marketing outreach techniques to drive awareness and sign-ups for the online newsletter:
    - Use small space display ads in local newspapers
    - Use viral marketing - flyers, emails, etc.
    - Use media relations
    - Mass mail simple postcards into key neighborhoods:
      - Sewer residential developments that use Rt. 29 or Rt. 28 headed into Northern Virginia
      - Highway signs placed close to ramps on I-66
    - Message should position newsletter as the I-66 “Driving Manual” - go to I66Commuter.org
    - Park & Ride Lot windshield stuffers
    - Church bulletins

The Key: Always Ask People To Pass It On
Rappahannock-Rapidan
Rideshare Marketing Program

- Key Messages:
  
  Primary:
  - Advance top tier benefits - save on transportation cost, time savings, avoid congestion
  - Showcase savings amount
  - Reinforce "flexibility" in that ridesharing does not have to be 5 days a week.
  - Reinforce the availability of local ridematching services and a sizable local database (even though it is managed by COG).
  - Encourage people to register on the database so successful matching can take place.

  Secondary:
  - Advance middle tier perceived benefits - do more on your commute (personal and work) and help the environment
  - Co-opt telecommuters - make them part of the "ridesharing mentality"...
  - "If you telecommute some days, you can easily carpool others.
  - Suggest that likely-to-rideshare targets should ask their employers about these programs and services (i.e., transit fare or even compressed work week, especially in a tight labor market).