

5 UNDERSTANDING EXISTING COMMUTES AND OPPORTUNITIES IN THE REGION: SURVEY RESULTS

This chapter summarizes the comments and issues expressed by members of the public, employers and community representatives during an initial round of public surveys which included three separate original data collection efforts conducted as part of this Commuter Study. The surveys include the following:

- A telephone survey of residents of the 12-county study area, inquiring about their existing travel characteristics, demographic characteristics, and commute travel preferences.
- A survey of commuters using existing park-and-ride and park-and-pool facilities in MnDOT District 3 for information about their existing commutes and commute travel preferences
- A survey of more than 100 employers, both large and small, in MnDOT District 3 to collect information about employee work shifts, commute information and opportunities for employers to improve travel for employees.

TELEPHONE SURVEY OF RESIDENTS

A telephone survey was conducted in October of 2011. Residents of the 12 study area counties, as well as a sample of residents of Chisago County, were interviewed.

Methodology

The survey team spoke with 1,201 randomly-selected residents segmented by county across the study area to examine modes of transportation to school and/or work, awareness and use of public transportation services, and likelihood of utilization eight specific bus or commuter rail routes. In each case, price sensitivity was determined and the attractiveness of a variety of service amenities was established. As a concluding section, respondents were also asked a number of socio-economic and lifestyle questions. Oversampling was conducted in Wright and Sherburne counties as well as in the St. Cloud metro region, and those samples were re-weighted to reflect population differences.

A copy of the survey is included in Appendix E.

Summary of Findings

The telephone survey identified several important travel characteristics in the region:

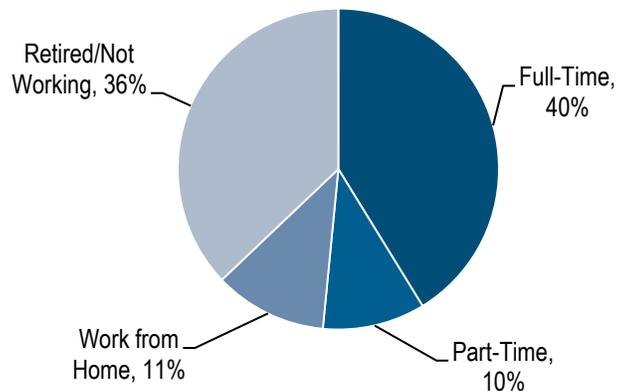
- Residents traveling for work primarily drive alone, though some carpool, and a few walk or bike. Less than 1% take transit to work.
- Over 50% are unaware of any transit services in their area.
- Nearly one in five residents (18%) has used public transportation in the past 12 months; residents with both high (over \$75,000) and low (under \$25,000) annual incomes are more likely to use transit.
- Nearly 20% of residents surveyed indicated a likelihood to take a bus during peak commuting hours to both St. Cloud (18%) and the Twin Cities (18%). Midday bus service to St. Cloud garnered slightly more support (19%) than to the Twin Cities (18%).

The following sections describe results of the telephone survey in more detail.

Characteristics of the Population

Of the 1,201 respondents, 40% work full-time, and 10% part-time. Nearly 36% are retired or are not currently working, and 11% work exclusively from home. Three percent (3%) volunteer outside of their home. Questions about commuting patterns were asked of the full-time and part-time workers and of the volunteers.

Figure 5-1 Employment Status of Survey Respondents



Most households (72%) had at least two vehicles available. Only 23% had one vehicle, and only 4% had no vehicle available.

The breakdown of respondents by county was defined to be generally representative of the breakdown of the total population, as shown in Figure 5-2.

Figure 5-2 Number of Respondents by County

County	% of Respondents	% of Total Population
Benton	6%	6.3%
Cass	5%	4.4%
Chisago	2%	N/A
Crow Wing	11%	9.3%
Isanti	6%	6.5%
Kanabec	3%	2.5%
Mille Lacs	4%	4.2%
Morrison	5%	5%
Sherburne	12%	14.6%
Stearns	23%	22.1%
Todd	4%	3.6%
Wadena	2%	2%
Wright	18%	19.5%

The most common income range for a respondent was \$25,000 to \$50,000, which is the range for median income for nine of the 12 counties in the region. Three of the counties – Isanti, Sherburne, and Wright – have a median income between \$50,000 and \$75,000, and 21% of survey respondents fell into this category.

Ninety-five percent (95%) of respondents were white; African-American, Hispanic, Asian-Pacific Islander, and Native Americans each represented one percent of the respondents. This tracks closely with the overall District 3 racial breakdown.

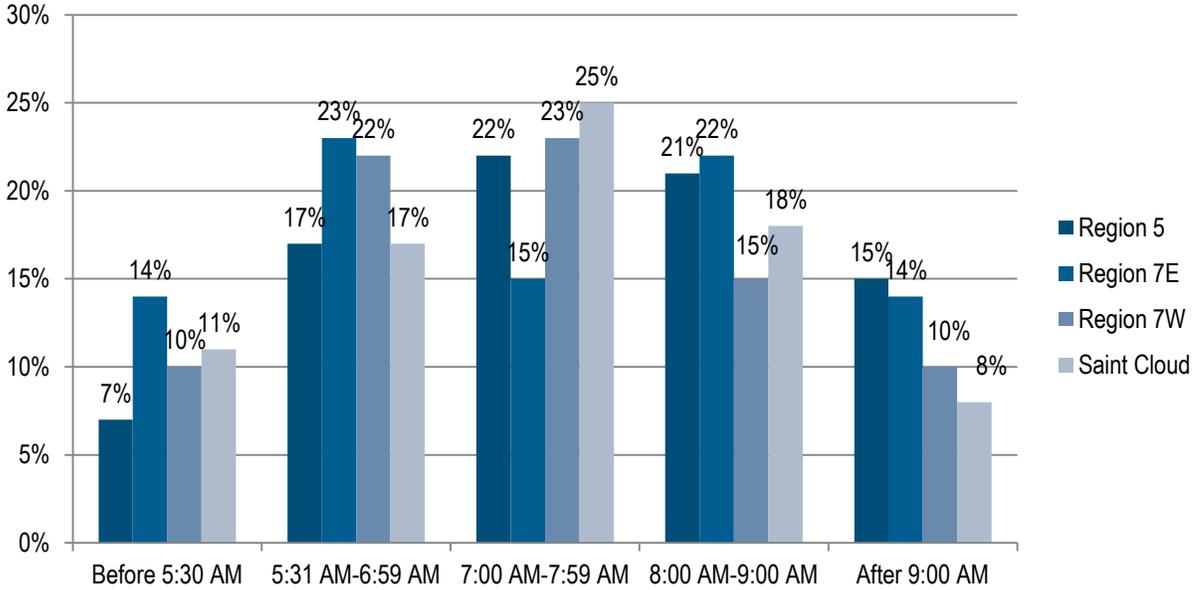
Respondents' age categories varied slightly from the overall populations'. Slightly more respondents were between 55 and 64 than the overall population (23% surveyed versus 15% overall), and slightly fewer respondents were between 18 and 34 (17% surveyed versus 30% overall).

Commute Characteristics

Most respondents (56%) commute less than 20 minutes to their work site. However, 20% have a commute that is over 30 minutes.

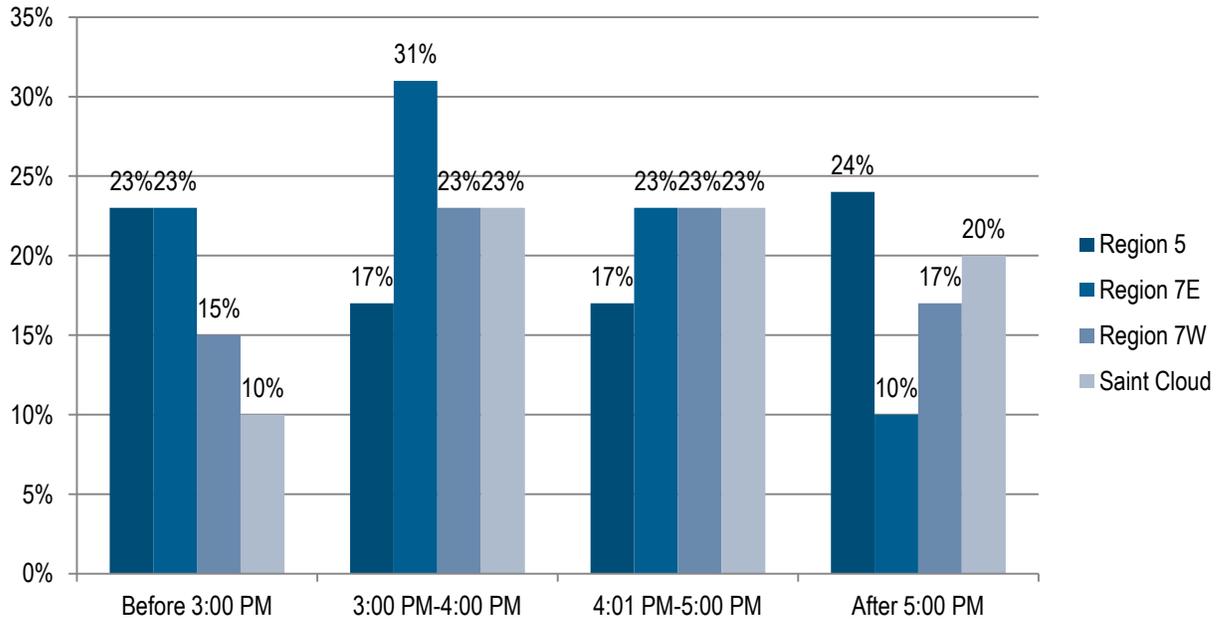
Forty percent typically leave from home in the morning between 7:00 AM and 9:00 AM. Another 21% leave between 5:30 AM and 6:59 AM. In Figure 5-3, the morning commute times in each region are almost normally distributed around the start time of 7:30 AM.

Figure 5-3 Morning Commute Hour of Departure by Region



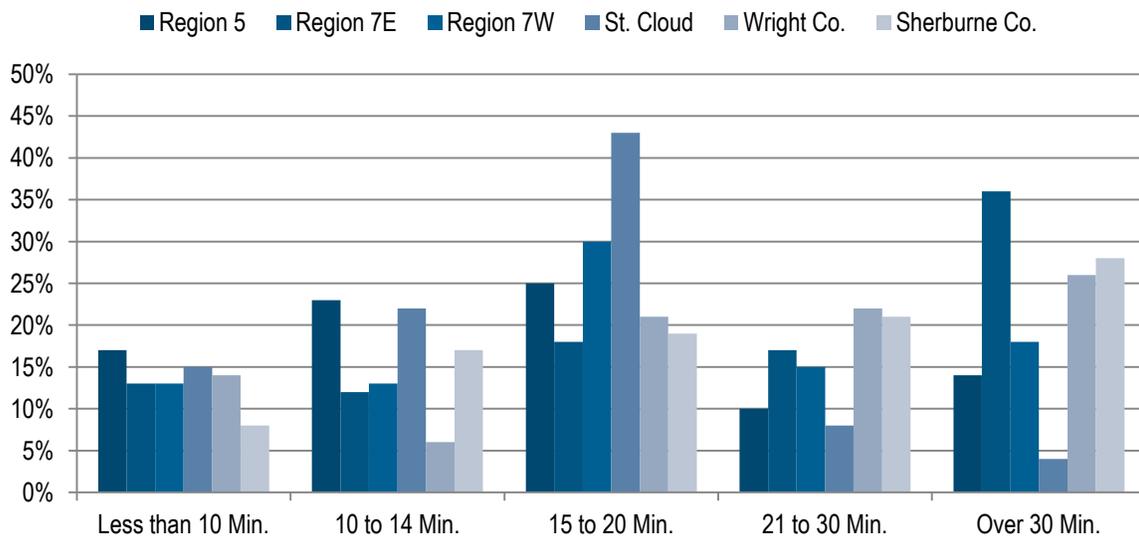
Forty-five percent leave from work or school in the afternoon or evening between 3:00 PM and 5:00 PM. An additional 17% leave after 5:00 PM. Eighty-seven percent report they make no stops on their regular commute in either direction; six percent, however, drop-off or pick-up a child at school, childcare, or youth activities. As shown in Figure 5-6, Region 7E residents tend to have earlier return times, while the Saint Cloud Region residents are most apt to have later return times. Region 5 job-holders tend to hold either earlier or later return times.

Figure 5-4 Evening Commute Hour of Departure by Region



Forty-two percent estimate their average one-way commute travel time in the morning as between 10 and 20 minutes; thirty-four percent estimate it at over 20 minutes. Commute times in Region 7E as a whole and in Wright and Sherburne Counties are more likely to be over 30 minutes long (see Figure 5-5).

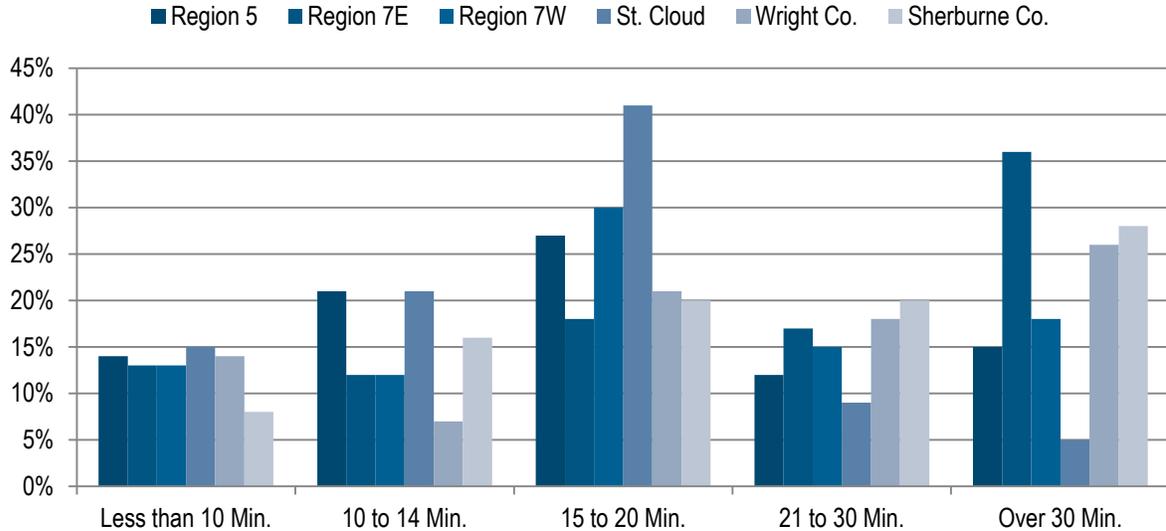
Figure 5-5 Average Morning Commute Times by Region



In the afternoon or evening (Figure 5-6), 42% estimate their average one-way commute travel time as between 10 and 20 minutes; 35% place it at over 20 minutes. As with the morning commutes, residents commuting from Region 7E and Wright or Sherburne Counties are more likely to have a commute over 30 minutes.

Residents earning over \$75,000 annually also have slightly longer commutes in both directions.

Figure 5-6 Average Evening Commute Times by Region



Respondents were asked where they typically travel on a daily basis. Commutes are fairly scattered from various portions of Wright, Sherburne, Benton, and Stearns Counties to the Twin Cities, but heavy commuting patterns are evident. Commuting to St. Cloud from the immediately surrounding ZIP Codes shows the highest ZIP Code-to-ZIP Code patterns. Information from the survey about commutes by ZIP Code are presented in Chapter 6, in the discussion about District 3 trip origins and destinations.

Mode of Transportation to Work

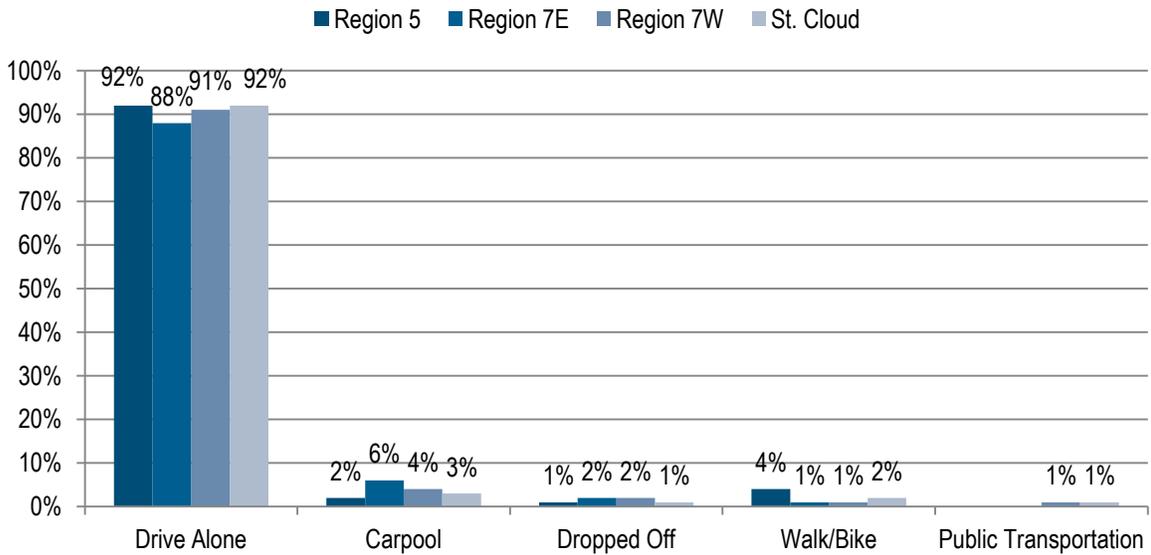
Over 90% of total survey respondents drive alone to their work place. Four percent (4%) carpool, 2% are dropped off, and 2% walk or bike. Only 1% use public transportation. Based on respondent information, 95% of work sites offer free parking to employees, and this is consistent with the information collected from major employers within District 3 (see the Employer Survey summary in this chapter).

Some regional variation exists in these totals. For instance, Region 7E (Isanti, Kanabec, and Mille Lacs Counties) has the lowest drive-alone rate in the area, with only 88% driving alone to work. Six percent (6%) of Region 7E residents report carpooling, the mode with the second-highest share in this region. With some of the longest commute times in District 3, carpooling in these counties is a reasonable option. No transit into the Twin Cities is available from this area, and only one vanpool – from Isanti – is currently established.

Carpooling in Region 7W represents four percent of commutes; it is three percent of the share in St. Cloud, and two percent in Region 5.

Only about half of the respondents in all regions surveyed are familiar with transit services in their areas, and only respondents in St. Cloud and Region 7W use public transportation for work. One percent (1%) of those surveyed in both of these areas uses public transportation.

Figure 5-7 District 3 Commuter Mode Share



Respondents in Sherburne County are more likely to use transit for work, but still only 3% responded that they use it regularly. Two groups of respondents are more likely to walk or bike to work – those earning less than \$25,000 annually and those who do not self-identify as white.

Respondents who are students have a much higher tendency to carpool and use transit, though nearly 50% still drive alone to get to school. In Region 5, nearly 63% of students carpool to school, with only 38% driving alone. In St. Cloud, 20% of students use public transportation to get to school, all riding St. Cloud Metro Bus.

In Region 7W, 23% of students use public transportation to access school, all using St. Cloud Metro Bus. Another 11% carpool.

Reasons for Not Using Transit

For respondents who do not use public transit, 67% said that the primary reason is that they prefer to drive and have no need to use transit. An additional 18% responded that no transit service is available near their home. A small percentage (4%) state that available transit services do not travel where they need to go; another four percent state that transit is inconvenient and that public transit takes too long to use. Three percent are not familiar with public transit services or what is available in their area.

Other Transit Usage

Eighteen percent (18%) of respondents had used a form of public transit in the last 12 months. Of those, most had only used transit less than once per month. Forty-one percent (41%) had used transit for a special event such as a sports event, concert, or fair (and presumably, many of the individuals who had used transit has done so on a visit to the Twin Cities). In Sherburne County, 31% had used transit in the last 12 months, as had 27% of respondents from St. Cloud. In Region 7W, 23% had used transit. However, in Region 5, only 10% had used transit in the last year.

Most respondents had driven to a park-and-ride, bus or rail station in order to access transit.

Figure 5-8 Mode of Accessing Transit

Mode of Access	Percentage
Drove to park-and-ride, bus or rail station	59%
Dropped off at park-and-ride, bus or rail station	12%
Walked or biked	14%
Other	13%

Likelihood to Use Transit

The most popular transit service with respondents was commuter rail from their home community to the Twin Cities, with 34% stating that they would be “somewhat likely” or “very likely” to use such a service. Weekend bus service to the Twin Cities was the next most popular, with 22% stating likely use. Other services had approximately 20% support, on average.

In nearly all cases, residents of Region 7E and St. Cloud showed the greatest likelihood to use transit. Region 7W residents stated a greater likelihood than 7W residents to use a bus in the evening hours to St. Cloud and to use commuter rail to the Twin Cities, though St. Cloud residents stated a much greater likelihood to use the commuter rail service.

Figure 5-9 Likelihood to Use Transit

Service	% “Somewhat Likely” or “Very Likely” to Use	Average Willingness to Pay per Trip
Commuter Rail to Twin Cities	34%	\$8.60
Weekend Bus to Twin Cities	22%	\$5.00
Weekday Midday Bus to St. Cloud	19%	\$4.14
Weekday Commuting Bus to St. Cloud	18%	\$4.22
Weekday Commuting Bus to Twin Cities	18%	\$5.00
Midday Bus Service to Twin Cities	18%	\$5.00
Evening Bus to St. Cloud	16%	\$4.04
Evening Bus to Twin Cities	16%	\$5.00

Residents with incomes less than \$25,000 indicated a lower likelihood to use all services to the Twin Cities region. For the St. Cloud services, this group indicated usage similar to the overall population. Residents making over \$75,000 were generally willing to pay more for transit service than the overall population. This group, also, indicated a higher likelihood of using a commuter rail service to the Twin Cities, but a strong unlikelihood to use a commuter bus to St. Cloud. Residents of St. Cloud and Sherburne County were also more likely to use a commuter rail service than the total surveyed group.

Only 14% of Wright County and 12% of Sherburne County residents said they would consider using a commuter bus service to the Minneapolis-St. Paul area during peak commute hours. Interestingly, as much as 21% of Wright County respondents expressed interest in commuter bus service to the Twin Cities during midday hours. Respondents from Isanti, Kanabec and Mille Lacs County, as well as those from Chisago County directly north of the Minneapolis-St. Paul urban

area, indicated a somewhat greater interest in regional commuter bus service, with 21% indicating they would be somewhat or very likely to consider using such a service. Similarly, about 20% of St. Cloud area residents expressed some interest in a commuter bus link to the Twin Cities. Even residents of the Region 5 counties expressed some interest in weekday commuter bus service to the Minneapolis-St. Paul area: 17% said they were somewhat or very interested in a bus option. In almost all communities, the percentage of respondents who indicated they were very unlikely to have any interest in region bus service exceeded 65%, and was even higher in some counties.

Interest in regional bus service to St. Cloud was slightly lower than interest in service to the Twin Cities. Among Region 5 and Region 7E respondents, 18% and 19%, respectively, expressed some interest in a commuter hour link to St. Cloud. Sherburne County residents expressed the greatest interest in a commuter bus link to St. Cloud: 22% said they had some interest (with nine percent indicating they would be very interested). Approximately the same numbers said they would be interested in midday and weekend services. Compared with the other groups, Wright County residents have the least interest in a commuter link to St. Cloud: 16% expressed some interest. As a whole, 17% of Region 7W residents living outside of St. Cloud expressed some interest in commuter bus service to St. Cloud.

For every proposed service, Region 5 indicated a willingness to pay much higher fares for a one-way trip. In general, Wright County residents were willing to pay less than the overall region for transit services, especially commuter and midday bus service to St. Cloud and evening and weekend service to the Twin Cities. Residents of Region 7E were willing to pay more to travel to the Twin Cities in the evening.

The most popular pick-up location for these services was a park-and-ride or park-and-pool at a major highway or freeway – 35% of respondents preferred this option. Another 15% preferred a downtown location or a transit hub. In Wright County, 44% preferred a park-and-ride near a major highway.

Influences on decision-making about travel habits were queried, and the results are listed in Figure 5-10 below. The most important factor that would influence an individual to use transit is an increase in gas prices. Worsening traffic congestion is also an influence, but to a lesser degree.

Figure 5-10 Travel Choice Factors

Change	Very Important	Somewhat Important
Gas price increase	28%	21%
Traffic congestion increase	18%	21%
Longer service span of existing transit	12%	17%
Lower bus fares	12%	14%
Higher parking fees	10%	15%

Transit and Amenity Preferences

A list of amenities on transit services was presented to respondents, and they were asked to designate each amenity as “important” or “desirable.” The only amenity with more than 10% of respondents listing it as “important” was wireless internet connectivity, with 11%; 8% cited reclining seats as important. Other amenities, such as electrical power outlets, monitors showing films or news, bike storage, snacks, and in-seat audio systems were not considered important deciding factors.

Figure 5-11 Amenity Preferences

Amenity	Important Deciding Factor to Use Service	Desirable but not a Deciding Factor
Wi-Fi, wireless Internet connection	11%	21%
Reclining seats	8%	29%
Electrical power outlets	6%	19%
Video system, movies or news programs shown on monitors	5%	24%
Storage space for bicycles	4%	11%
Snacks for purchase	2%	22%
Audio system, music available at each seat	2%	19%

Respondents were aware of the importance of a number of transportation issues in the region. Respondents were generally evenly split among what they considered to be the three main transportation issues: 1) reducing congestion on major highway corridors; 2) street maintenance and repaving; and 3) increasing the availability of public transportation. The addition of sidewalks and bicycle lanes did not rank as highly as these primary three.

Gender and Commuting Patterns

Of the 1,201 survey respondents, 52% were female, and 48% male. In general, males were more likely to work full-time or from home, and females were more likely to work part-time, volunteer, or be retired or not working.

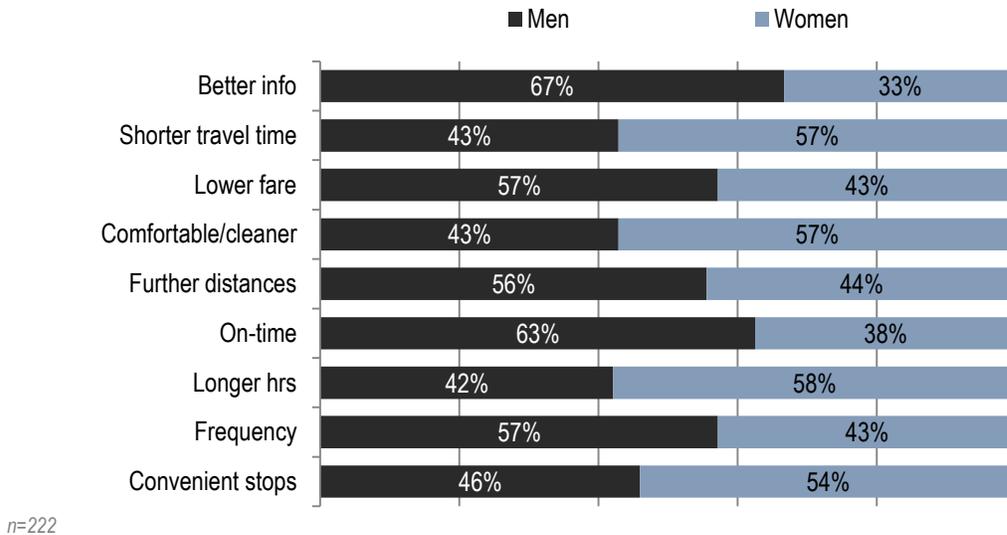
No major differences between the genders arose when asking about mode of transportation to work; though slightly more males than females used transit (2% versus 0%), the mode share was still very small. Females were slightly more likely to walk or bike to work.

Women tend to leave for work in the morning slightly later than men, with 25% of men leaving between 5:30 AM and 7:00 AM (versus 18% of women), and 15% of women leaving after 9:00 AM (versus 9% of men). Women also leave work earlier than men, with 22% leaving before 3:00 PM, compared to 13% of men. This could relate to more females working part-time or going to volunteer positions, and could be related to the need to pick-up children from school. Women are twice as likely to make a stop during their commute related to a child, but only a small proportion of all commuters indicated they make a stop to drop off or pick up a child: four percent of men compared with eight percent of women. Commutes for women are much shorter than for men – 17% have a commute of less than 10 minutes, compared to only 10% of men.

In most other metrics, women and men answered questions with similar percentage breakdowns. The one exception is willingness to pay for different types of hypothetical services traveling to the Twin Cities and to St. Cloud. Women consistently answered that they would be willing to pay between \$5 and \$10 or over \$10 for the same service for which men preferred to pay \$3 to \$5. This suggests a potential greater level of interest by women in commuter transportation services, particularly if they are deemed to be priced fairly. Based on the findings, men are more cost-sensitive with regard to potential commuter services. This was especially pronounced for commute hour and weekday bus services to the Twin Cities and for evening and midday bus service to St. Cloud.

When people who had used transit were asked what would encourage them to use transit more often, women and men indicated slightly different factors to encourage transit use. No conclusions can be drawn from this information because the overall sample size was relatively small, especially for each of the factors indicated, but the differences are interesting and suggest that women and men may have different perspectives with regard to what might be the most important characteristics of transit (see Figure 5-12).

Figure 5-12 Factors that Would Encourage More Transit Use: Men versus Women



Data from the park-and-ride/park-and-pool survey was also considered. Among the very small sample of park-and-pool users, 71% of survey respondents identified themselves as female. Although the reason that park-and-pool respondents were primarily women cannot be determined based on the survey responses — the number of respondents was very small(21) and is likely to be a result of the small sample size — it raises questions about whether there may be a greater willingness among women to share a ride or, possibly, that women who share rides tend to park their car and get a ride with someone else more often than men who share rides. These types of questions were explored in the focus groups conducted as part of the study (See Appendix J).

Media Habits

Thirty-three percent of respondents read the “Star Tribune,” while only three percent read the “Saint Paul Pioneer Press,” and four percent read them both. Twenty-two percent read the daily “Saint Cloud Times,” and eight percent, the “Brainerd Dispatch.”

Seventy-seven percent regularly read no weekly magazines. “Time” and “Newsweek” are each regularly read by three percent. Fifty-eight percent access no on-line media websites. Eight percent go to the “Star Tribune” website. Seven percent regularly access “MSN” or “MSNBC;” six percent access “CNN;” and, four percent each, “Fox News” and “Yahoo News.” Fifty-four percent subscribe to cable television.

PARK-AND-RIDE SURVEYS

The surveys taken at the park-and-ride/park-and-pool locations were designed to obtain additional information about existing lot users and their travel choices. The passenger survey asked detailed questions about how each passenger completes his or her trip and opinions on the existing services. The survey also collected information on the rider’s personal characteristics, such as age, income, gender, and modes of access to and from the lots. The surveys were distributed at park-and-ride lots (with transit service), official park-and-pool lots (without regularly scheduled transit service, but promoted as a facility by MnDOT), and unofficial park-and-pool lots (without regularly scheduled transit service and not promoted as a facility by MnDOT). There were a total of 15 facilities that had surveys distributed:

- Four park-and-ride lots: St. Cloud Northstar Link Lot, Becker Northstar Link Lot, Big Lake Station Northstar Lot, and Elk River Station Northstar Lot
- Eight park-and-pool lots (official): Albany, Albertville, Big Lake, Cambridge, Monticello, Elk River, Princeton, and Waverly
- Three park-and-pool lots (unofficial): Rockford, St. Joseph and Zimmerman

Methodology

The consulting team distributed a survey to solicit input from the general public using park-and-ride/pool facilities to get a sense of their origin/destination, usage, opinion of the facility, and service alternatives. The survey had a total of 18 questions and could either be returned online or by business reply mail. At the four park-and-ride lots, surveys were handed to passengers who were waiting for the transit service to arrive during the AM peak hours of the day. At the eleven park-and-pool lots, surveyors placed surveys on parked cars within the lots, during midday. All surveys were administered October 5th and 6th, 2011.

A total of 364 (197 handed out and 167 left on windshields) were distributed to transit passengers; a total of 149 (41%) were returned. Out of the 364 surveys returned, 118 were returned by business reply mail, and 31 were returned online. Survey respondents were offered an opportunity to enter a contest to win a \$100 VISA gift card, which was awarded in November 2011. There were responses from passengers at all but three of the park-and-pool facilities: Rockford, Big Lake and Monticello. A copy of the survey instrument can be found in Appendix F.

Surveys asked respondents to provide information about their one-way trip, and requested that they fill out a survey once. Respondents from both the park-and-ride lots and the park-and-pool lots were asked the same set of questions, including service alternatives and how likely the

respondent would be to use various alternatives for school, work, or errands if they were available. Demographic information was also fielded and a summary of these data follow below.

The analysis of the survey results provides a demographic overview that combines data from all park-and-ride/park-and-pool services. These findings provide context for a more detailed analysis of ridership characteristics broken out by park-and-ride versus park-and-pool lots.

Summary of Findings

Demographic Profile of Respondents

Gender

Of the total 364 surveys administered, 142 of the survey respondents listed their gender (121 park-and-ride/21 park-and-pool). As shown in Figure 5-13, park-and-ride respondents indicated an almost even split of males and females using the service, however 71% of park-and-pool respondents identified themselves as female.

Figure 5-13 Respondent Gender

Ethnicity	Park-and-Ride	Park-and-Pool
<i>n:</i>	121	21
Male	49%	29%
Female	51%	71%

Age

The age options provided ranged from 16-17, to 65 or older. As shown in Figure 5-14, a majority (30%) of riders at the park-and-ride lots are between the ages of 35 and 44, and another 29% are between the ages of 45 and 54. Park-and-pool riders were younger, weighted between the ages of 18 and 34 (50%). Fewer seniors (65 or older) responded to the survey overall, though there was a higher proportion of this group using the park-and-pools.

Figure 5-14 Respondent Age

Age Range	Park-and-Ride	Park-and-Pool
<i>n:</i>	121	20
16 - 17	0.8%	0.0%
18 - 34	20.7%	50.0%
35 - 44	29.8%	20.0%
45 - 54	28.9%	20.0%
55 - 64	19.0%	5.0%
65 or older	0.8%	5.0%

Household Income

Figure 5-15 demonstrates that the highest group of respondents from both lot types has an annual household income of \$50,000 or more. For the park-and-ride lots, 76% of the respondents make an annual household income of \$75,000 or more, with 48% making an annual household income above \$100,000. For the park-and-pool lots, of the respondents, only 43% make a household income above \$75,000 annually, with the highest percentage (38%) of incomes between \$50,000-\$74,999.

Figure 5-15 Respondent Income Level

Income Range	Park-and-Ride	Park-and-Pool
<i>n:</i>	102	21
Under \$25,000	1.0%	4.8%
\$25,000 - \$49,999	10.8%	19.0%
\$50,000 - \$74,999	12.7%	38.1%
\$75,000 - \$99,999	27.5%	23.8%
\$100,000 +	48.0%	14.3%

Ethnicity

As shown in Figure 5-16 the majority of both the park-and-ride and park-and-pool respondents identified themselves as white, in line with the regional breakdown of race and ethnicity.

Figure 5-16 Respondent Identified Ethnicity

Ethnicity	Park-and-Ride	Park-and-Pool
<i>n:</i>	121	21
White	94.2%	100.0%
Black	0.8%	0.0%
Asian	0.8%	0.0%
Hispanic	2.5%	0.0%
Native American	1.7%	0.0%
Other or Mixed	0.0%	0.0%

Route Ridership Characteristics

Trip Destination Location

As shown in Figure 5-17 respondents using the park-and-ride lots were primarily traveling to Minneapolis (84%) with the remaining 16% traveling to other locations. The top “other” locations were Bloomington, Fridley, Minneapolis-St. Paul Airport and Columbia Heights.

Figure 5-18 shows a much greater spread of location destinations at the park-and-pool lots compared to the park-and-ride lots. As with the park-and-ride respondents, Minneapolis was the primary destination location (30%). However, respondents also indicated Maple Grove and Osseo as the next top destinations.

Appendix D provides details on destination responses for the St. Cloud Northstar Link Lot, Big Lake Station, and Elk River Station.

Figure 5-17 Trip Destination - Park-and-Ride Users

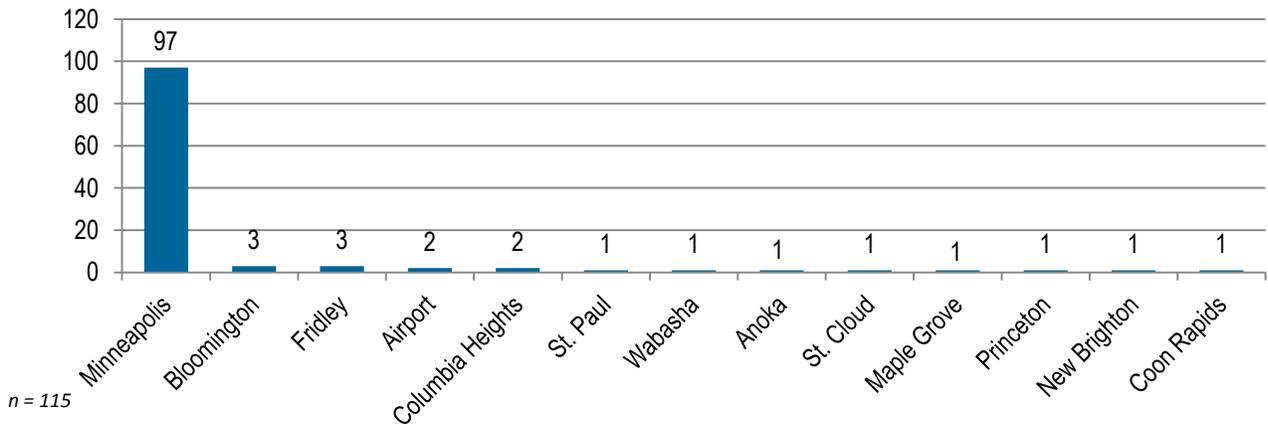
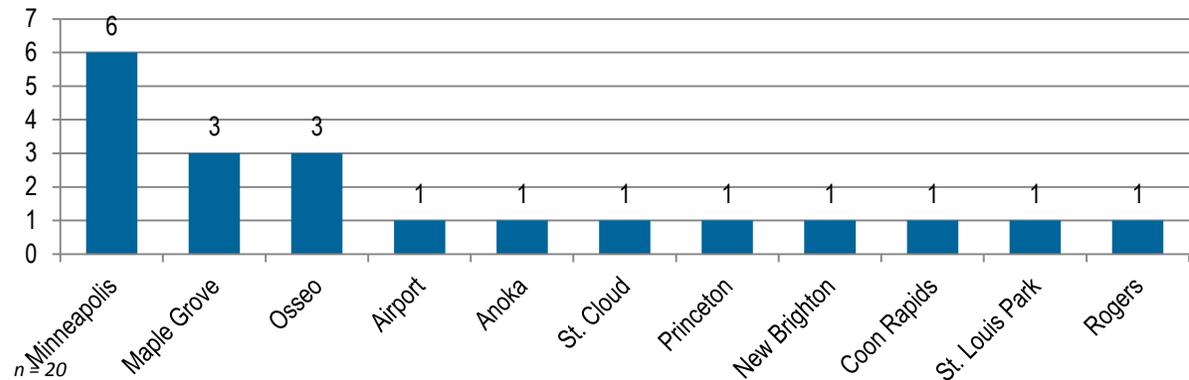


Figure 5-18 Trip Destination - Park-and-Pool Users



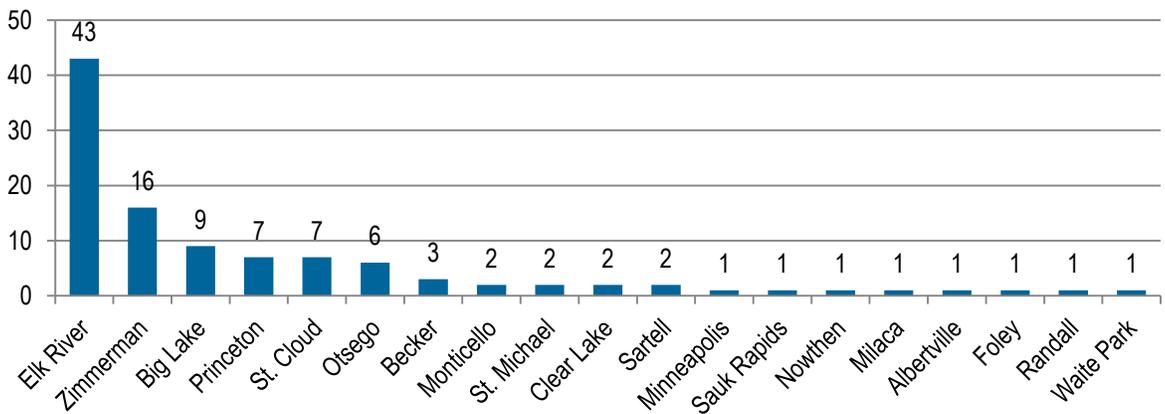
Trip Origin Location

As shown in Figure 5-19, the majority (40%) of park-and-ride respondents live in Elk River, which corresponds to the good response rate from surveys distributed at Elk River Station; of the 107 respondents that answered this question, 77 were from the Elk River Station Park-and-Ride.

The following cities make up another 43% of respondent origins: Zimmerman (15%), Big Lake(8%), Princeton (7%), St. Cloud (7%), and Otsego (6%).

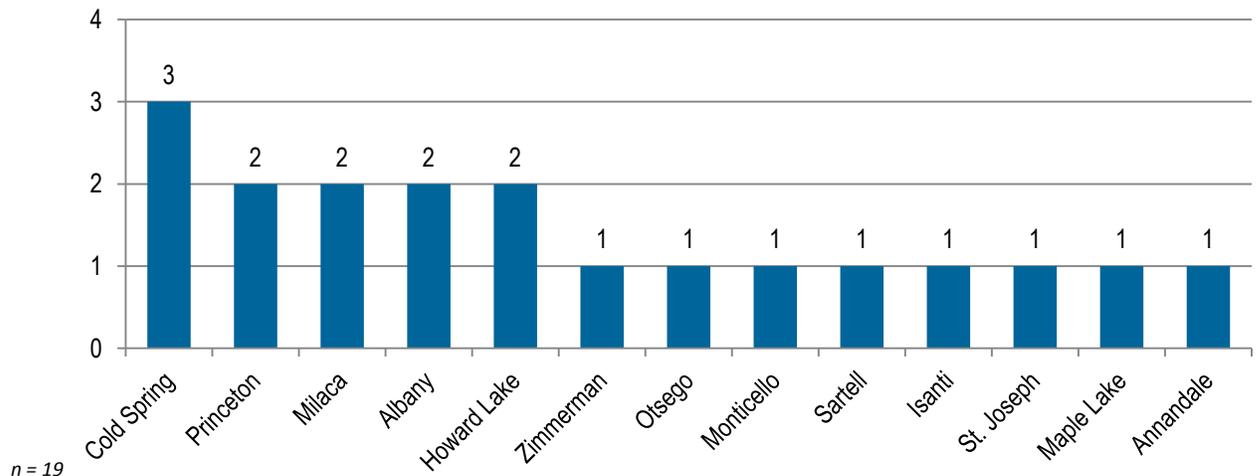
The park-and-pool respondent origins (Figure 5-21) are fairly spread out. Cold Spring is the most common origin (16%), followed closely by Princeton (11%), Milaca (11%), Albany (11%), and Howard Lake (11%).

Figure 5-19 Trip Origin - Park-and-Ride Users



n = 107

Figure 5-20 Trip Origin - Park-and-Pool Users



n = 19

Trip Purpose

As shown below in Figure 5-21 and 5-22, destinations for respondents from both lot types were primarily to work. In fact, 90% of park-and-ride respondents and 91% of park-and-pool respondents indicated work was the destination. Both lot types showed five percent of respondents traveling to and from school. The few origins classified as “other” included traveling to a game and the airport. Overall, destinations of respondents varied little between lot types.

Figure 5-21 Trip Purpose – Park-and-Ride

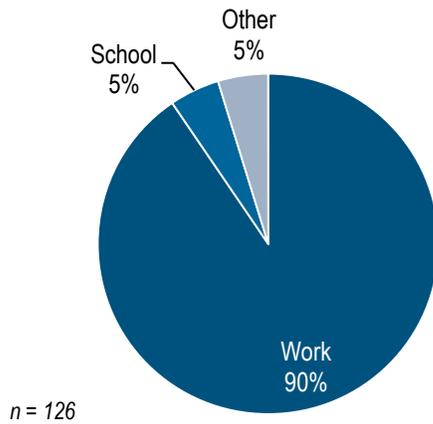
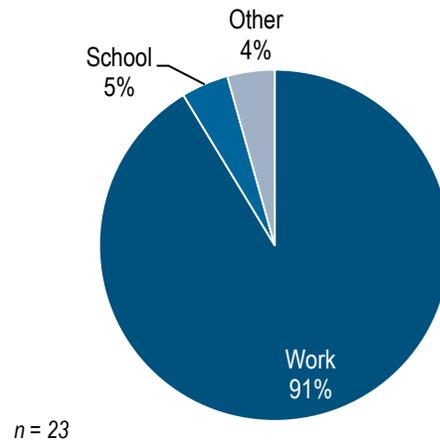


Figure 5-22 Trip Purpose – Park-and-Pool



Mode of Access to/from Lots

The majority of respondents, for both park-and-ride/pool lots, drove alone to access the facility. The park-and-ride lots had 50% arrive in a single occupancy vehicle, while the second most frequent form of access (30%) was via transit (bus or train to/from the Northstar Link). Eight percent of the respondents rode with others and six percent walked. For the park-and-pool facilities (sites with no transit service) the clear majority of respondents (74%) drove with others/carpooled to the site. The two other forms of access were 13% using a vanpool and 13% driving alone.

Figure 5-23 Mode of Access – Park-and-Ride

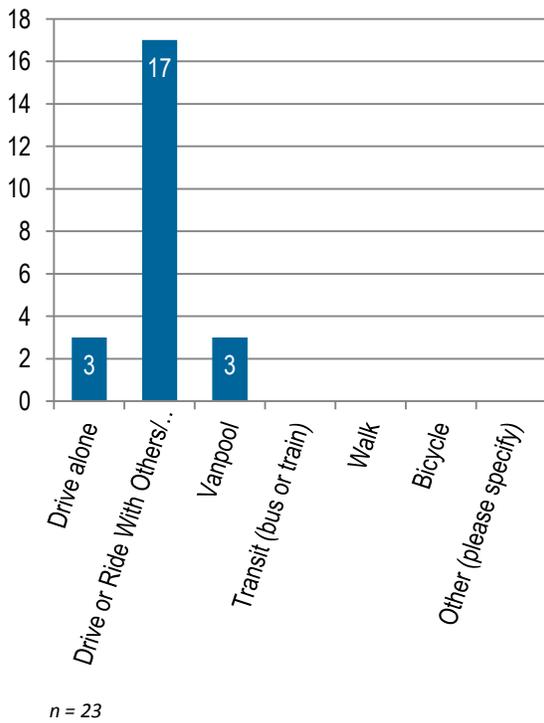
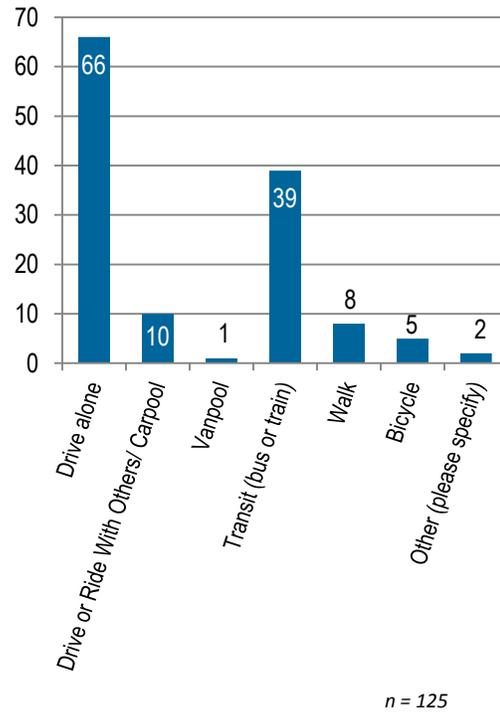


Figure 5-24 Mode of Access – Park-and-Ride

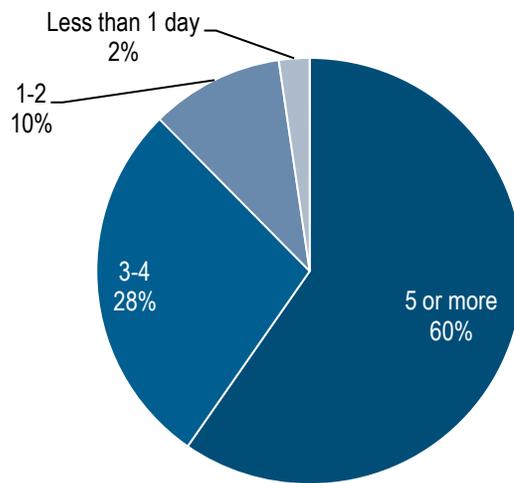


Use Characteristics

As shown in Figure 5-25, more than half (60%) of respondents indicated that they use the park-and-ride five or more times every week, and another quarter (28%) use it between three and four times every week. These results indicate that the large majority of passengers are regular users and rely on this service.

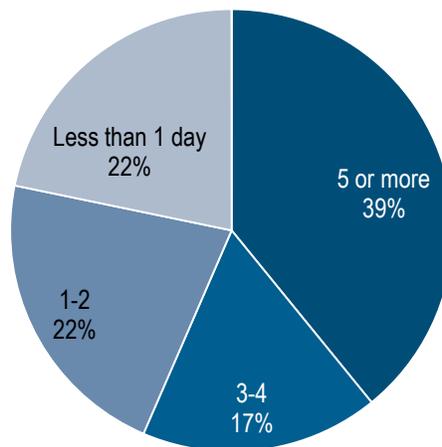
Figure 5-26 demonstrates that 39% of respondents are using park-and-pools five or more times each week, and that 44% use park-and-pool lots less than 2 days weekly.

Figure 5-25 How Many Days Per Week Respondents Use the Park-and-Ride



n = 129

Figure 5-26 How Many Days Per Week Respondents Use the Park-and-Pool



n = 23

When asked about why they use the facility, the top response, for both types of lots, was because it saves them money. This was followed by (1) being convenient to their home and destination, and (2) to share a ride/easier than driving alone.

Park-and ride and park-and-pool users also indicated how they travel when they are not using the facility. By a large majority, respondents indicated they drive alone. Figure 5-27 and Figure 5-28 provide summaries of responses.

Figure 5-27 Why Respondents Use this Service

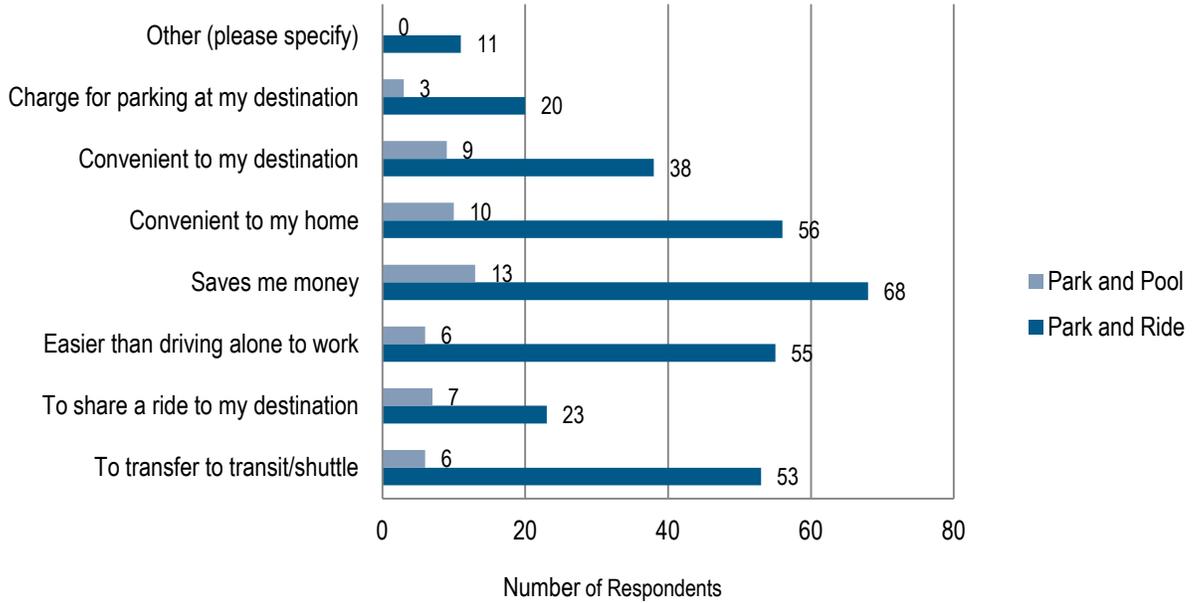
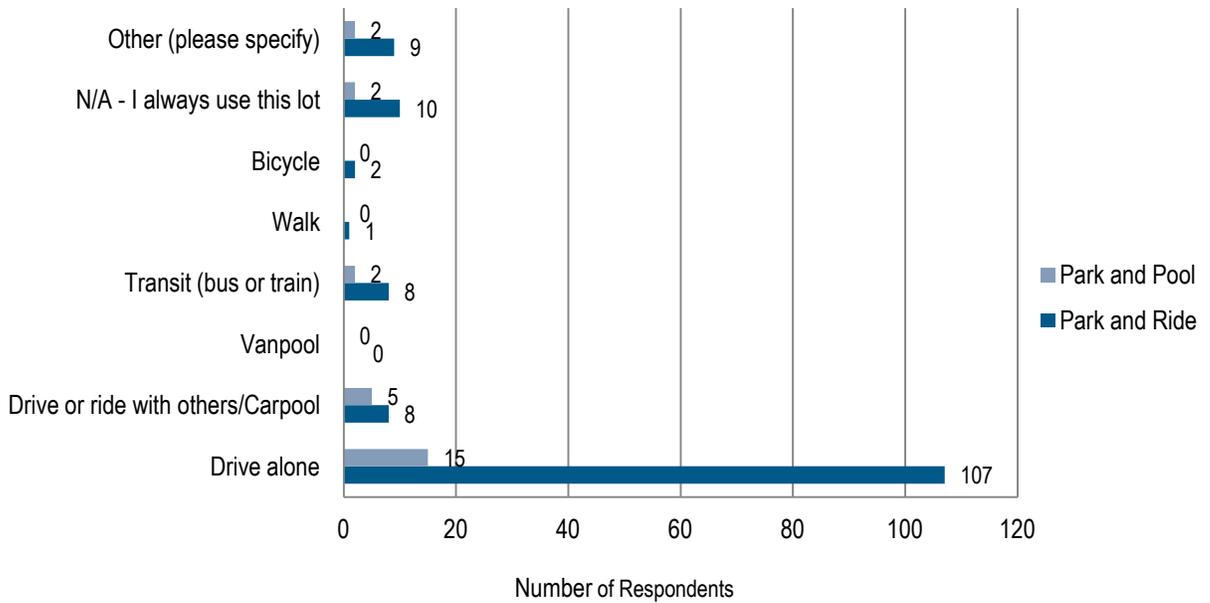


Figure 5-28 How Respondent Travels to His/Her Destination When Not Using this Service



Characteristics of the Facility

The survey asked respondents to rate, from poor to excellent (1 to 5), characteristics of the facility. The characteristics listed were location, cleanliness, snow removal, safety/security, signage, amenities, and ease of finding a parking space. Overall, survey respondents were satisfied with the facilities, with most characteristics receiving a score of 3 or more. In general, areas that received average or below-average responses were amenities, signage and safety/security. A detailed breakdown of responses for each facility is provided in Appendix D.

Improvements to Park-and-Rides

Respondents were asked which improvements to the lot would be most important, and were asked to select up to three of the following options: lighting/better lighting, telephone, waiting area/shelter, bicycle parking, restrooms, regional transit service to/from here, additional parking spaces, carpool lane between here and destination, shops and services nearby, staff/on-site attendant, seasonal maintenance (snow, leaf removal), other.

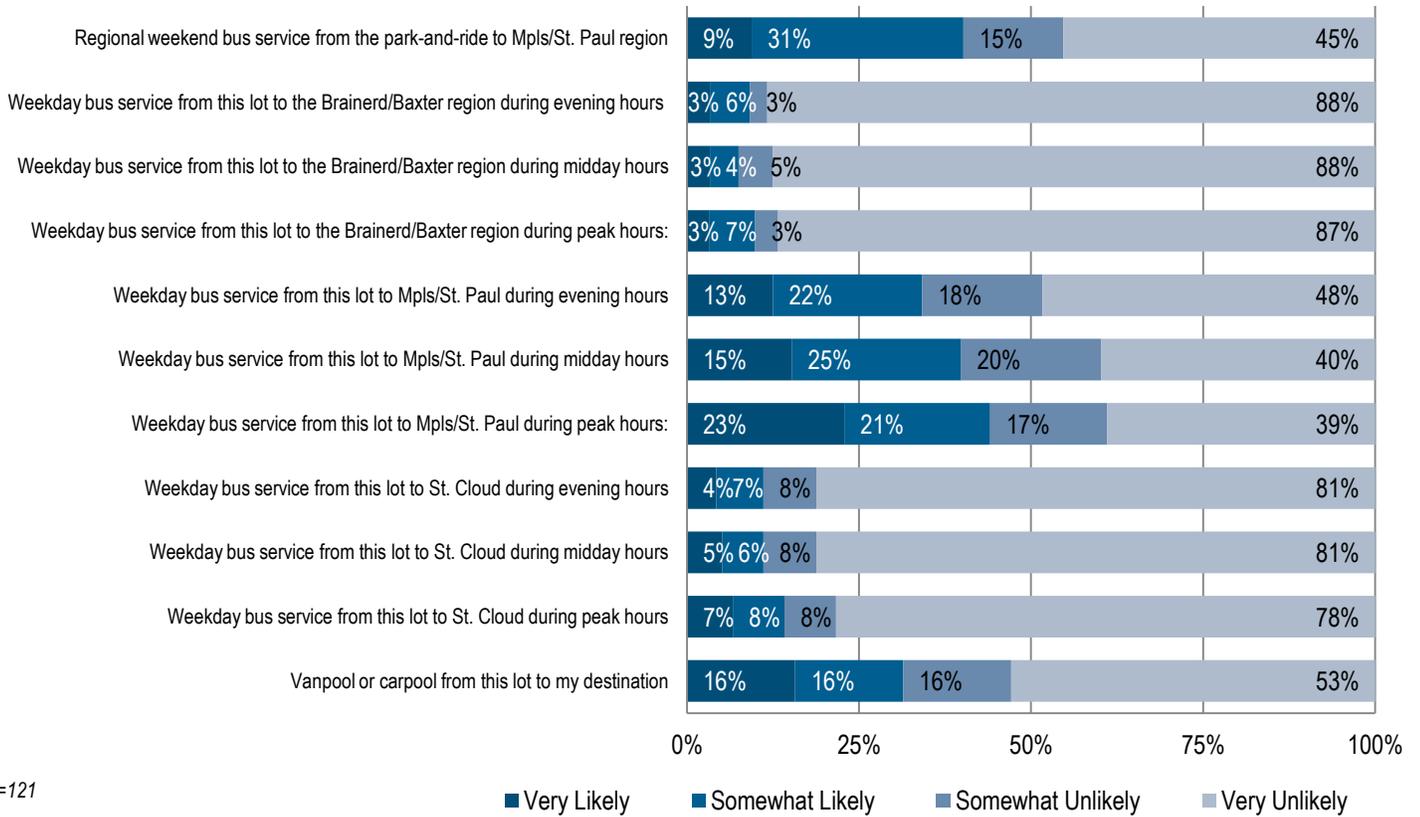
For both types of facilities, restrooms were the most common improvement listed. The park-and-ride respondents also listed shops and services, regional transit service (especially from those using the St. Cloud Northstar Link Lot), and the need to address safety concerns such as pedestrians having to cross over tracks/traffic, and dangerous/difficult intersections (Elk River Station respondents noted the concern about crossing the tracks). Respondents from park-and-pool facilities listed waiting area/shelter and improved parking surface/maintenance. A detailed breakdown of responses to this question is provided in Appendix D.

Service Alternatives

A final focus of the survey was to determine if an additional transportation service were available, how likely the respondent would be to use it. The listed options ranged from service to the Minneapolis-St. Paul, St. Cloud and Brainerd-Baxter areas during evening, midday or peak periods. Regional weekend service to Minneapolis-St. Paul and vanpool/carpool program were also included as options.

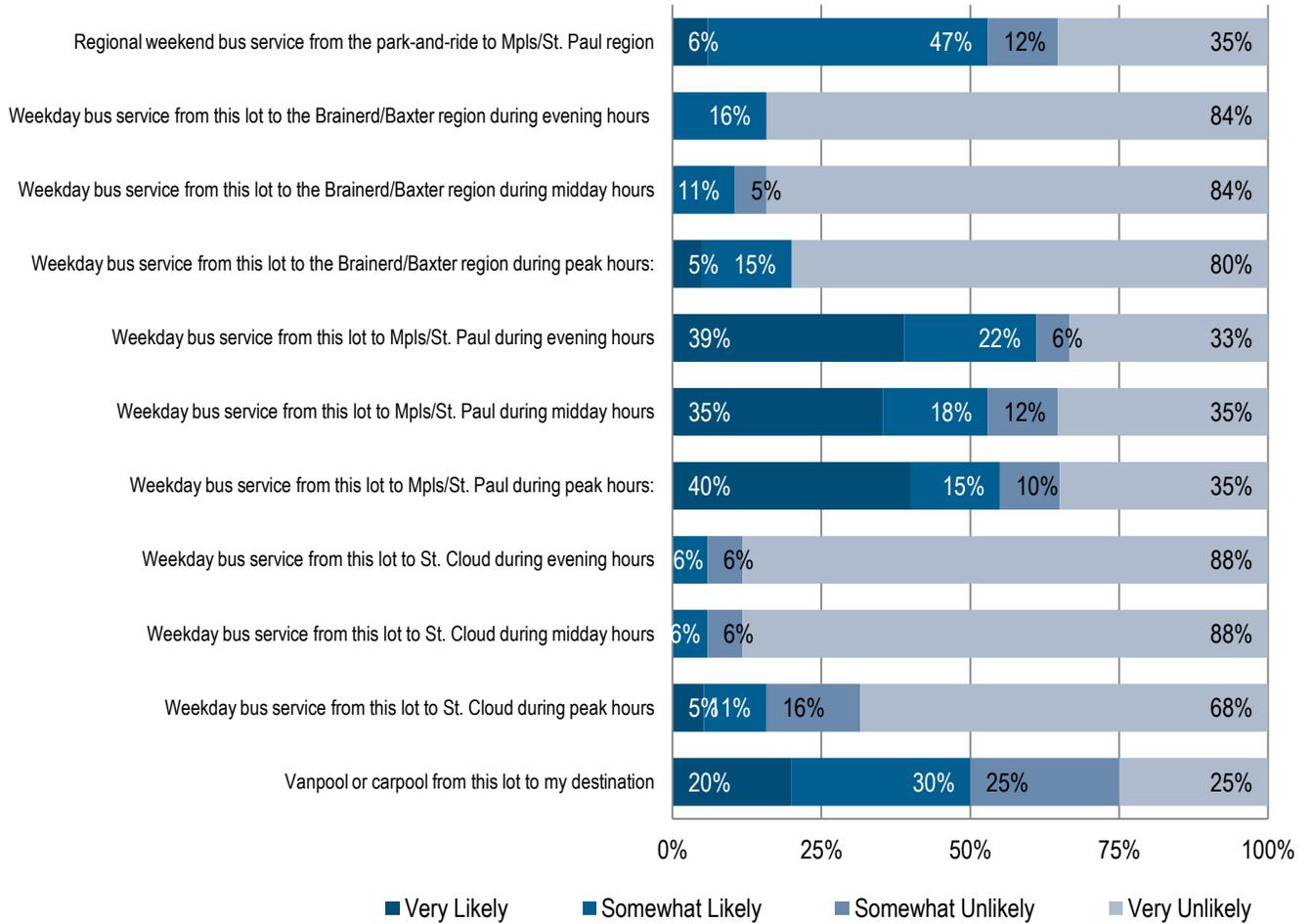
Park-and-ride respondents listed weekday bus service to Minneapolis-St. Paul during peak hours as the service that they would be very likely or somewhat likely to use (44%). This was followed by regional weekend bus service to Minneapolis-St. Paul and weekday midday service to Minneapolis-St. Paul midday (40%). Service to Brainerd-Baxter and St. Cloud were the least likely to be used. Figure 5-29 provides a summary of responses for park-and-ride sites.

Figure 5-29 How Likely Park-and-Ride Respondents Would be to Use these Service Alternatives



Park-and-pool respondents listed weekday bus service to Minneapolis-St. Paul during evening hours as the service they would very likely or somewhat likely use (61%). Regional weekend bus service to Minneapolis-St. Paul and weekday service to Minneapolis-St. Paul during peak hours were the next highest choices for people who indicated they were very likely or somewhat likely to use them (55%).

Figure 5-30 How Likely Park-and-Pool Respondents Would be to Use these Service Alternatives



EMPLOYER SURVEY

Overview and Methodology

Reaching out to employers and getting their perspectives on commute needs and current use was another key component of the survey effort. The consulting team designed and implemented an Internet-based survey consisting of approximately 20 questions. Many of the questions asked for straightforward information such as location of business and number of employees, several offered multiple choice responses, and a small number of open-ended responses enabled respondents to provide their opinions and concerns. The purpose of the survey was to get a general picture of commutes to jobs based wholly within District 3.

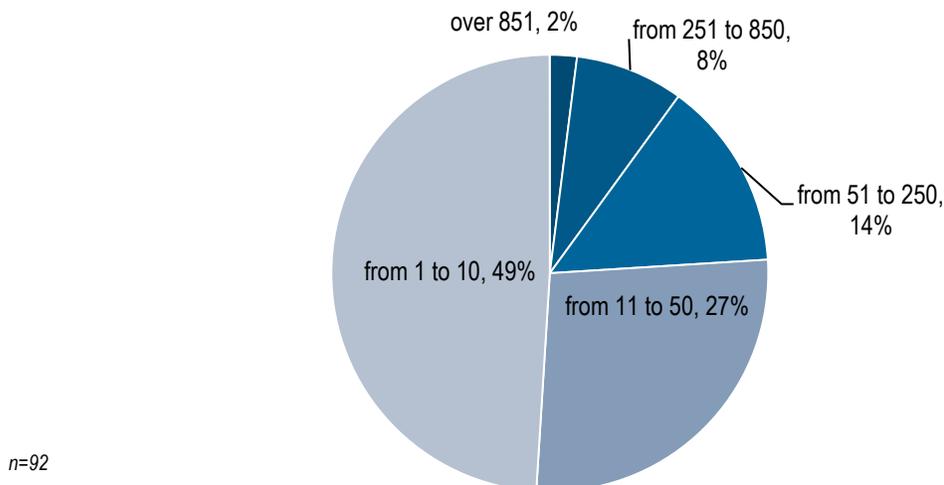
Surveys were conducted online via the website www.employersurvey.info (using a Survey Monkey web form). The survey announcement was sent from regional development commission representatives and was forwarded by chambers of commerce throughout the study area. A number of surveys were sent directly by members of the consulting team, who made follow-up phone calls to many of the largest employers in District 3, encouraging them to complete the survey. Responses were received from a total of 119 employers in the 12-county area during November and December, 2011. A copy of the survey instrument can be found in Appendix G.

Summary of Findings

Number of Employees

About a quarter of the employers who responded did not provide data about how many employees there were at their primary location. Of the 77% who responded to the question, almost half (49%) had between 1 and 10 full-time employees and 27% employed between 11 and 50 full-time workers. Fourteen percent had between 51 and 250 full-time workers. The largest 10% of employers in the sample each employed more than 251 people full-time, and 2% (two companies) were large enough to employ over 851 people full-time. A total of 7,306 full-time workers are employed at the largest 10% of organizations surveyed (nine employers), and those workers represent 73% of the total number of full-time employees in the sample. The largest group of employers, the 49% who employ between one and ten full-time workers, employ only 2% of the total number of full-time workers in the sample (see Figure 5-31).

Figure 5-31 Number of Full-Time Workers



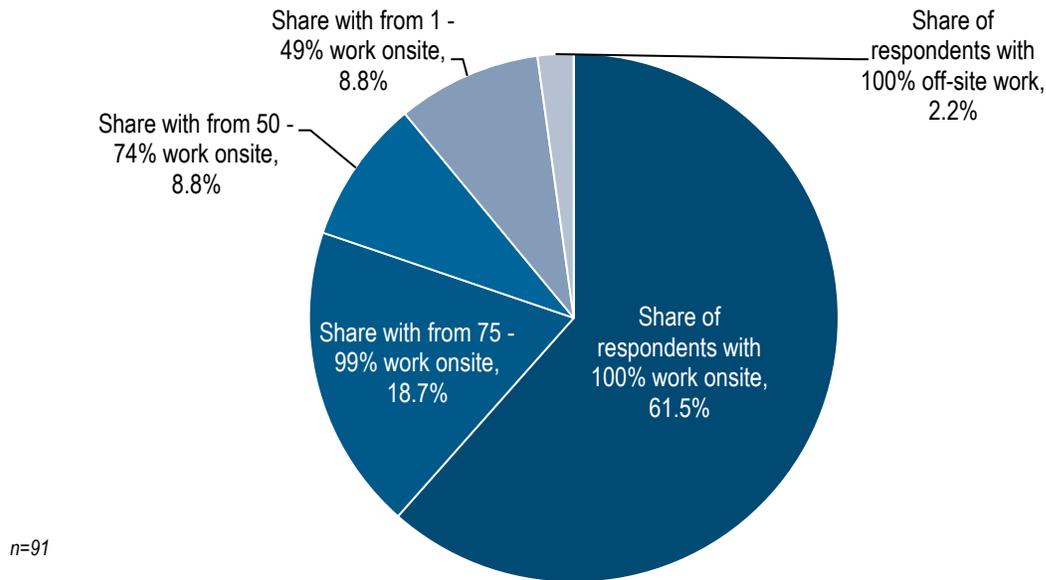
The breakdown for total employees, including part time and seasonal workers as well as workers at other locations of the companies, is similar, with the largest employers, in general, employing the largest number of part-time and seasonal workers in addition to their full-time workforce.

Work Location

One question the survey asked was: “Do your employees primarily work onsite [at primary or secondary worksites], or do they work offsite/elsewhere throughout the region? (i.e., house calls, deliveries, etc.).” Seventy-six percent of the employers responded to this question; of those, only two very small employers (one of them a towing company) had all of their employees working offsite, while at 62% of the employers responding, all employees worked onsite. The largest employers were among those where all employees worked onsite (see Figure 5-32).

Those organizations with larger shares of employees working offsite (from 50% to 99%) generally have fewer than 50 employees, many of them fewer than ten. These tend to be organizations such as real estate offices, painters, and public employers (cities or counties). Offsite employees total a little over 1,000 employees, or approximately 7% of the total number of employees in the sample.

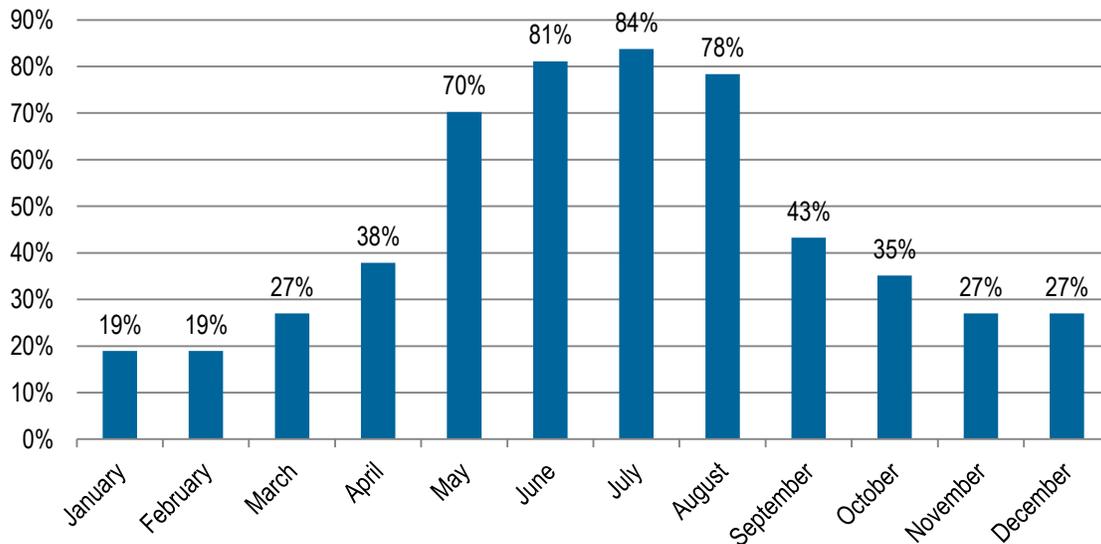
Figure 5-32 Onsite vs. Offsite Employees



Seasonal Staff

Almost a third (31%) of the total employers who responded hire additional employees seasonally. Of these, most of them hire extra people during the summer months, between May and August, as shown in Figure 5-33. Most of these employers are cities, manufacturers, or, in one case, a casino. Among them are some, but not all, of the largest employers in the sample.

Figure 5-33 Distribution of Seasonal Hiring (% of respondents who hire seasonally)



n=37

Parking Availability

The vast majority of the employers who responded to the survey provide a place for their employees to park their cars. The only exceptions were a small, three-person firm and a café. None of the employees have to pay to park at any surveyed locations in District 3, presenting a potential challenge for encouraging people to use other commute modes, because a charge for parking is typically considered one of the greatest disincentives for driving to work.

Commute Services, Programs, and Assistance

A series of questions in the survey asked about the kinds of programs employers offered their workers to help them get to work, as well as employers' willingness to initiate or consider programs or services they do not currently offer. In general, only a very small percentage of the companies offer any of the programs mentioned, which range from informational services and incentives for not driving alone, to shuttles and flexible work hours. The few exceptions are flexible work hours (offered by 36% of the employers), the ability to telecommute (26%), and compressed work weeks (e.g., working four ten-hour days rather than five eight-hour days) (31%). All of the other programs mentioned in the survey are offered by only three percent to six percent of the employers.

Between one-quarter and one-half of the employers that do not offer programs would be willing to consider providing some of them, depending on the program.

For example, only four percent of the employers now offer any kind of preferential parking for carpools or vanpools. More than one-half of the respondents (60%) say they would not be interested in offering preferential parking in the future, but 36% noted that although they currently do not, they would consider it. The breakdown is similar for “emergency ride home” programs (offering a taxi ride home for employees who do not drive alone, in case of an emergency), financial incentives for bicycling, transit, walking, carpooling, telecommuting, and vanpooling (e.g., subsidies; bonuses; random financial rewards, etc.), and “commuter choice” programs (pre-tax set asides for carpool or vanpool costs).

The percentage of employers who say they would be willing to pay some kind of transportation allowance (to help offset transportation costs) is smaller (14%). However, almost one-half of those who do not currently offer other incentives (such as a prize drawing) would be willing to consider doing so.

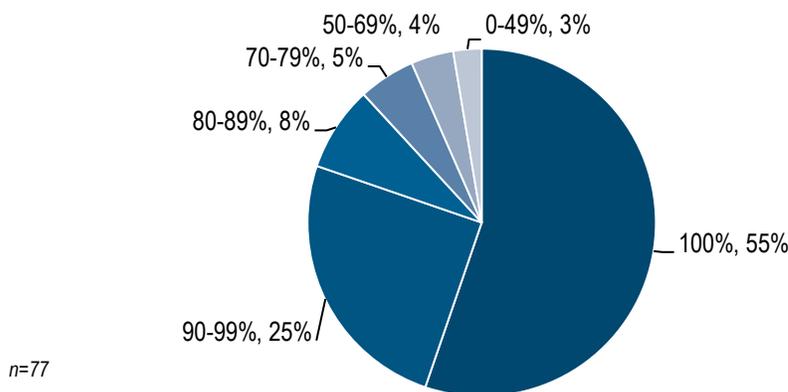
Between four and six percent of the employers in the survey currently provide informational services about commute alternatives. Around half of the respondents said they’d be willing to consider providing information such as bus schedules, using a newsletter or website to provide information about commute alternatives, or supporting events to promote the use of alternatives to driving alone (e.g., transportation fairs, bike to work day, contests, etc.). A smaller percentage (23%) said they would be willing to create a staff position or office to provide commute information, and only 28% would be willing to provide assistance in forming carpools or vanpools among their employees.

Employee Commutes

Employers were asked to provide information about employee commutes. If they did not keep statistics on these, respondents were asked to estimate how many of their employees drove alone, carpooled, took public transit, biked, or walked to work.

By far the most common commute mode is driving alone, which, again, reflects other data sources about commutes in District 3. Figure 5-34 shows the percentage of employers who say all their employees drive alone to work; over three-quarters say at least 90% of their employees do so, and for over one-half of those responding, their entire workforce drives alone. The largest employers said their drive-alone mode share ranged between 75% and 90% of their workforce (two of the largest ones did not respond to this question).

Figure 5-34 Percent of Employers With 100% Drive Alone Commutes

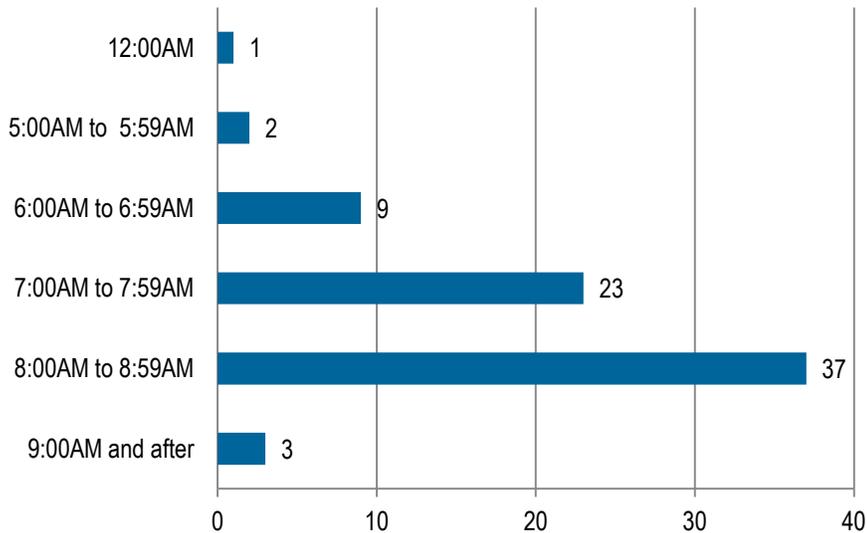


The second-most common mode was carpooling (“carpooling or getting a ride with someone else”), followed by walking and bicycling. Almost no public transit was utilized for commuting (one employer in St. Cloud, with a workforce of about 250, said that two percent of its employees take public transit), and no vanpools were mentioned. Carpools ranged from two percent of a workforce of about 70 to 50% of a workforce of 36, with about 26 employers saying some portion of their workforce carpooled. This represents a total of about 10% of the employees among all employers.

Work Schedules

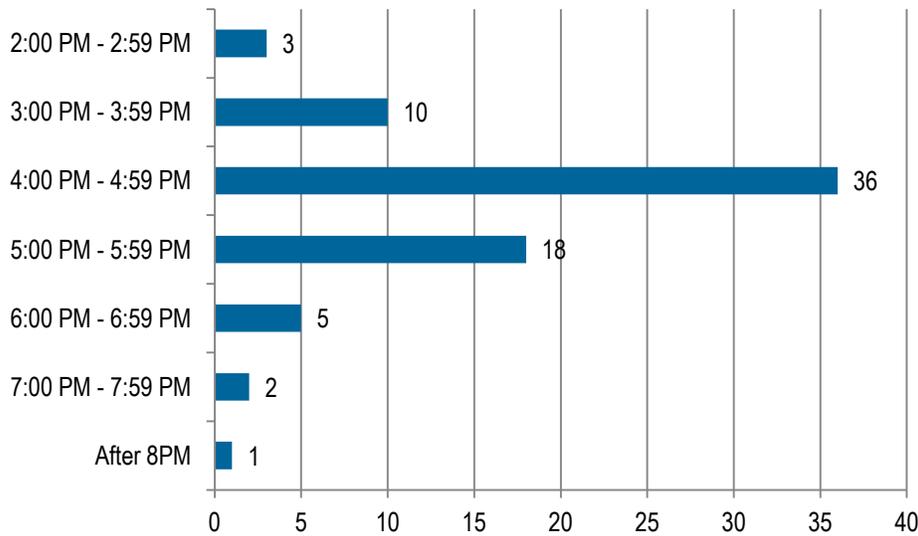
Based on the survey findings, most workers in District 3 jobs work a regular shift that begins sometime between 7:00 AM and 9:00 AM and ends between 4:00 PM and 6:00 PM. Figure 5-35 and Figure 5-36 show the number of employers whose regular shifts begin and end at various times. Some variation exists, with some shifts beginning as early as 6:00 AM and some ending as early as 3:00 PM, but the number of employers reporting these start and end times is small.

Figure 5-35 Start Time Frequency, Primary Shift (Number of Employers)



n=75

Figure 5-36 End Time Frequency, Primary Shift (Number of Employers)



n=75

Only a few employers reported second shifts, beginning around 3:30 PM and ending at midnight. One of these was a large medical center that employs close to 1,700 people, both part time and full time. The medical center operates 24 hours a day with three shifts, from 8:00 AM to 4:30 PM, 3:30 PM to midnight, and from 11:30 PM to 8:00 AM. Another large employer, a casino, did not report shift information, but in the comments section at the end of the survey pointed out that work shifts start every hour on the hour.

Future Plans

When asked whether they planned to expand or contract in the near future (“in the next couple of years”), 83 employers responded. Most of them—80%—said they have no such plans. Of the 20% that said they do, 59% said they plan to add staff, six percent expect to contract or shrink their workforce, and 35% thought the size of their organization would change, but they were uncertain whether that would mean growth or contraction. Most of the open-ended comments in this section expressed the hope that they would be able to grow.

Open-Ended Comments

At the end of the survey, respondents were asked: “Are you aware of any employee-related issues/concerns/needs about commutes that might be helpful for us to know as we move forward in this study? We are also interested in whether you have specific transportation workforce issues/needs for seniors, people with disabilities, immigrants/refugees, etc.”

Seventeen employers responded, taking the opportunity to express concerns specific to their workforce. A few commented on the lack of public transit options for their workers, and several health care providers added that the lack of transportation options for their clients was also a serious problem. One respondent pointed out that the dearth of transportation options limited its local hiring options. Another response questioned whether people would be willing to take transit or to carpool even if these options were provided.

One large employer, a casino, wrote: “We are constantly fighting this battle.... It is a large challenge as our average Associate drives 60 miles round trip and [they need] options with the cost of gas and our average front line Associate’s wages. We would like to be a voice in options and how to move forward on this issue.”

One respondent expressed irritation at the idea that it was an employer’s task to offer incentives, seeing it as yet another cost in the midst of a difficult economy. Other comments included a request to “fix Highway 94 by adding lanes” and a complaint about the lack of a second river crossing in the Monticello area “where many of our employees live.”

OTHER STUDIES WITH RELEVANT PUBLIC INPUT

The consulting team reviewed a number of reports and studies which pointed to service gaps and needs in District 3. Two studies are briefly summarized below which identify preferences and priorities based on surveys and focus groups.

MnDOT Greater Minnesota Transit Investment Plan 2010 On-Board Survey Tech Memo

2010

MnDOT conducted an on-board survey across all state transit systems to determine statewide transit needs and perceptions. Data from all public transit providers was collected over one weekday and one weekend day via an on-board survey. Over 11,000 responses were collected for the 64 transit systems that returned valid responses. One-half of respondents rode large urban fixed-route services, one-third rode rural service, eight percent small urban service, and one percent large urban ADA service.

Primary findings include:

- 53% rode because they did not have a car or did not drive
- 86% rode at least twice per week, and over half rode at least five days per week
- 70% would like to see expanded hours of service

No questions focused specifically on commuting, but 34% of respondents were riding to work during the survey. This number was slightly higher for large urban fixed-route systems, slightly lower for rural and small urban systems, and much lower for the large urban ADA systems surveyed.

MnDOT Great Minnesota Transit Investment Plan 2010 Focus Group Findings

One focus group was held in each of the 10 development regions across the state. Approximately 10 to 12 residents from each region attended, and recruiting was targeted to seniors, minorities, persons with low incomes, and persons with a disability.

Key themes from the focus groups include:

- Most participants owned a vehicle and used it for their daily trips.
- Trip type varied by demographic group.
- Awareness of transit services was highly varied.
- A majority of participants believed transit to be inconvenient and therefore undesirable as a way to travel. Most also believed that using transit limits their independence.

- Several comments related to the perception that transit is only for seniors or persons with disabilities and not for the general public.
- Waiting in cold weather or in the snow was cited as a reason for not using transit.
- Many participants discussed their perception that transit is not a safe mode to use, citing personal safety or safety of children.
- Several participants noted that they see nearly empty buses in operation and believed the service to be a waste of money.
- Fares were generally believed to be reasonable.
- Most participants supported the increased marketing of services.
- A number of participants also commented that promotional events and incentives to ride would increase ridership.
- Many focus group attendees said that they use the phone book to find information, and many use the internet, brochures and community fliers.
- Information should be posted on community bulletin boards, such as in churches, grocery stores and senior centers.
- Participants indicated that they could envision increased transit use sometime in the future, by others or by themselves.
- Participants offered service improvement suggestions, such as making trips shorter, stopping less often, shortening wait times, creating express bus lanes, and coordinating service with local institutions and businesses.
- Attendees cited a need for expanded service hours and areas, and supported fixed routes over dial-a-ride.

CONCLUSION

The surveys found that there are generally low to moderate levels of familiarity with transit systems in District 3. Responses vary somewhat among the various counties and regions in the study area, but they are more similar than different, even comparing rural versus suburban respondents. Most people have automobile access for their commutes and indicate little interest in mobility options. People who currently use park-and-ride facilities have a much greater level of interest in regional commuter bus services than the general population. Park-and-ride users generally note that park-and-rides are located in convenient locations, but require improved lighting, sheltered waiting areas, restrooms and other amenity improvements.

The employer survey showcases that driving is unquestionably the primary commute mode in Central Minnesota, and that although major employers may be supportive of transit or ridesharing, they do not have policies in place to encourage employees to use alternative modes. The employer survey shows that non-auto commutes are a minor consideration for many large employers in District 3. Based on the data collected, it can reasonably be assumed that most major employers in the study area, outside of those with worksites in very dense or geographically constrained areas like downtown St. Cloud, offer free parking for their employees and have very few employees who use transit (if it is available to them). Informal follow-up with a few of the

employers suggests that most of them do not have employees who need transit or that the local transit systems and service schedules do not meet their shift schedules.

Major employers are not anti-transit; it is simply not a need that arises for them on a day-to-day basis. Service sector employees who typically work during more traditional “business day” hours are more likely to consider regional transit service options or ridesharing if those services meet their needs.