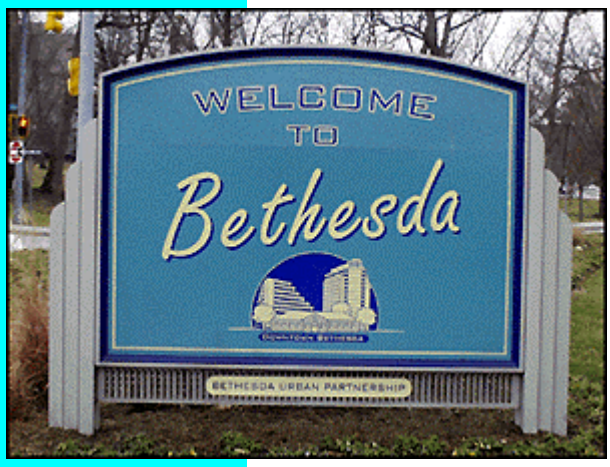
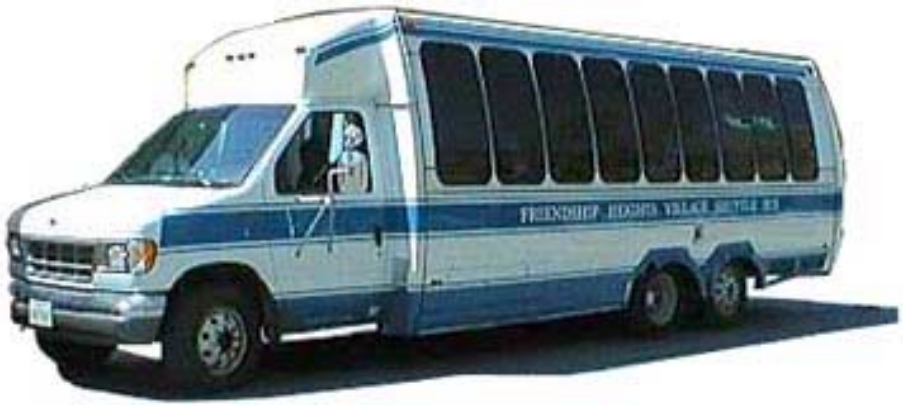
Commuting Behavior Research in Bethesda and Friendship Heights, MD

Executive Summary



for Montgomery County
Department of Public Works and Transportation
Division of Transit Services



conducted by Potomac Survey Research
4733 Bethesda Avenue
Suite 600A
Bethesda, MD 20814
301.656.7900 phone
301.656.7903 fax

Project Background

In January 2000, the Montgomery County Department of Public Works and Transportation, Division of Transit Services (DTS), commissioned Potomac Survey Research, Inc. to undertake a program of focus group research to study the attitudes of commuters into downtown Bethesda and Friendship Heights, Maryland.

This project focuses on commuters who primarily drive their own Single Occupancy Vehicles (SOVs) into these two downtown areas to go to work. DTS wants to understand what specific actions or messages could persuade a share of these SOV commuters to begin using alternative means of transportation.

Potomac conducted a total of four focus groups in downtown Bethesda and Friendship Heights during February 2000 among this target group of commuters. Approximately 10 to 12 SOV commuters participated in each focus group session. Based on a discussion outline developed in consultation with a team comprised of personnel from DTS and the Bethesda Urban Partnership, our moderator facilitated each discussion to elicit participants' attitudes and behaviors on many important issues.

"The reason you don't notice delays on the Metro is they're running every six minutes or every two minutes...it's great really."

The focus group sessions examined the key advantages and disadvantages of driving to work, incentives and subsidies offered by employers, experience with parking rates and availability, impressions of various alternative forms of transportation such as Metrorail and Ride On, specific recommendations for improving the Ride On bus system, reactions to special amenities such as the "Bethesda 8" shuttle and the "Smart Card," and messages and motivations that would change participants' own commuting behavior. These group discussions surfaced a wealth of valuable information, summarized in the following pages of this report.

It is important to note that the results of focus group research are *qualitative* in nature. As such, they provide broad insight into awareness, attitudes, and opinions about the concepts and issues discussed. This research method is not intended to provide quantitatively precise data from which one can generalize to the total population of commuters.

Please also note that we did not find discernable differences between the views of the Bethesda and Friendship Heights participants in these focus groups. They held generally similar views on the issues we discussed. The obvious exception is the Bethesda 8 shuttle bus, which serves only downtown Bethesda.

As a follow-up to this focus group research, we recommend a quantitative phase be implemented to validate the findings described in this report among a statistically representative sample of the commuting population.

In the Executive Summary section of the Final Report, we have provided the most important findings gathered from the focus group phase of this study.

Summary

These are the most significant findings to emerge from this focus group research:

Traffic is a significant irritant for commuters. As commuters look ahead, they see the problem getting worse.

Commuters experience significant stress from driving to work on extremely congested roadways. They worry about the wear and tear on their vehicles, and they complain about the lack of courtesy and dangerous behavior of other drivers.

These commuters describe a worsening of these conditions in recent years, and they see the problem continuing to become more severe in the future.

Despite the disadvantages of traffic, Single Occupancy Vehicle (SOV) commuters state that they value the freedom and flexibility of driving their own car.

Insofar as traffic conditions permit, SOV commuters say they can go where they want, when they want. By contrast, most see mass transit as more restrictive because they must meet specific timetables and adhere to pre-determined routes that may not match their particular needs.

"You can control your environment. You can control hot, cold. You control the radio. You can make phone calls."

Increasingly, many busy commuters are combining shopping and other household errands with their daily commute. Their cars become storage facilities where they can keep their belongings and transport dry cleaning, groceries, and other items that they cannot imagine transporting by bus or train. Furthermore, SOV commuters worry that mass transit would force them to spend too much time and effort planning just what

items they can take to work and back home each day with the very limited carrying capacity they have on foot.

Most say that time favors driving, with the mode connections mass transit often requires making for a longer commute.

As a further significant benefit, SOV commuters are the kings and queens of their domain when traveling in their own vehicle. They can control their own environment, adjusting the temperature, listening to the radio station they want, altering their route to avoid traffic, all while eating breakfast if that is what they want.

By contrast, mass transit offers the specter of crowded trains and buses, unwanted social interactions (particularly early in the morning when they may not feel prepared to deal with other people), a lack of control over their own schedule, and restrictions on eating, loud music, and other personal pleasures. As a notable exception, many of these dedicated SOV commuters say they strongly prefer Metrorail when they must travel into downtown Washington. They cite traffic congestion and extremely expensive and unavailable parking as the key deterrents to driving.

Almost to a person, SOV commuters say the economics favor their decision to drive their own car to work.

In the Bethesda and Friendship Heights study areas, a significant majority of our interview subjects indicated that their employers subsidized all or a large part of their monthly parking expense. When compared to the daily cost of parking at a Metro station and paying a fare to ride a train or bus, the economics almost always seem to favor driving.

To throw the economic equation further out of balance, SOV commuters for the most part do not seem to include the cost of maintenance, insurance, or depreciation of their vehicles in their personal calculations. And in some cases, commuters clearly articulated that they did not include their gas, considering it a relatively insignificant expense. But all were acutely aware of the total cost of parking their cars at Metro and riding the train to their destination.

> **"I would like to take a commuter bus...in the neighborhood, but I don't know where the stop is and I haven't taken the time to find out."**

To compete more effectively with Single Occupancy Vehicles for a larger share of commuter travel, mass transit should try – where it can – to duplicate the convenience and economic advantages of driving.

As our moderator probed these SOV commuters' key motivations and decision factors, there emerged in every group a small handful of subjects who not only volunteered many ideas to improve the transit system but also seemed that they might actually be moved to change their own behavior as a result.

Foremost among these suggestions were these two powerful economic ideas:

1. **Lessen the tremendous incentive that employer-subsidized parking provides.**

   The economic scale is tipped heavily in one direction by employers who provide parking but no transit subsidy. Employers must be persuaded to be even-handed in providing mode-neutral transportation benefits.

   The County also has a significant role in setting monthly parking rates at the public lots and garages. The combination of parking lots at transit hubs charged at lower levels to encourage transit ridership, with garages in downtown employment centers charging significantly higher parking rates to discourage driving, would change some behavior. It must be noted again, however, that dedicated SOV commuters indicate that they are willing to pay substantially higher parking fees – much of which may be absorbed by their employers – before they will begin to leave their cars at home.

   > **"My office pays for my parking now. If they stopped doing that, I would take a look at [public] transportation."**

2. **Expand the "Smart Card" to be used throughout the transit system and in the public parking garages, making the system smoother and more seamless.**

   Convenience in paying the fare, and not needing to pull out cash on a daily basis are big selling points. The "Smart Card" is not currently well-known but is extremely well-received once described to these commuters, who avidly recommend that it should be available for use on buses and at parking facilities as well as on Metro. Providing one universally-accepted method of paying for transit could move some commuters.

RIDE ON

Some important lessons can be learned from the Metrorail system.

Some commuters wonder why they would bother to take a bus to beat traffic, since buses are subject to the same vagaries that plague private vehicles. Metrorail is singled out as a fantastically reliable system, with trains running as often as every two minutes, and largely immune to weather problems and traffic jams that affect everyone else.

> **"I also drive because I have free parking...I could use public [transportation], and the traffic sometimes is unbearable, but it's free parking."**

Dedicated rights of way for buses, and more frequent head times on the main routes are steps that seem very much in tune with commuters' desires. A complete summary of commuters' recommendations along these lines begins on Page 3-11 of the Final Report.

There is a significant education gap with regard to riding the bus, but this gap can be bridged.

Most SOV commuters do not even know how to approach the problem of figuring out how to catch the bus and take it successfully to their destination.

When presented with Ride On timetables, they seem generally able to read and understand them, but they ask for formatting changes to make them easier to use.

These commuters want maps that show them each bus stop. They want indicators at bus stops to tell them when the next bus is coming. And they want bus shelters that will keep them out of the weather.

Sophisticated Bethesda and Friendship Heights employees would turn to a Travelocity-style Internet site (now in the works) to help them plot bus trips across the County. When it is available, this Internet capability should be widely publicized.

Unfortunately, mass transit buses suffer from something of an image problem.

At varying levels, commuters worry about cleanliness problems, unfriendly drivers, small seats, diesel fumes, and crowding into the bus with people they admit do not make them feel comfortable. These impressions are not deep-seated but do surface in every group as respondents begin to talk about "the type of people" they think ride the bus.

The one or two experienced Ride On customers in each group had generally positive stories to tell, indicating that the more familiar the public becomes with the system the more likely they are to view it positively. A broad-scale PR campaign aimed at personalizing Ride On and reversing these incomplete impressions should be a high priority.

In summary, SOV commuters in Bethesda and Friendship Heights have clearly stated needs for their travel to and from work.

A large number of SOV commuters feel so strongly that the advantages of driving outweigh the traffic, stress, and costs of driving that they do not appear likely to change their mode of transportation anytime soon.

There are some commuters, however, who are actively weighing the factors influencing their commute and would potentially change their mode choice if some of these factors changed.

> **"...with the bus you get all the disadvantages of driving a private car with...none of the advantages of driving a private car."**

To know the size of this "swing" commuter group and the relative impact of each factor influencing their commuting decision, a quantitative survey measurement is needed as a follow-up to this study. Our recommendation for the next research phase is included in the Final Report.

In the "Detailed Findings" section of the Final Report, we provide a more in-depth analysis of these broad observations.

Commuting Behavior Research
in Bethesda and Friendship Heights, MD

for
Montgomery County
Department of Public Works and Transportation
Division of Transit Services

"Research Findings"

Conducted by
Potomac Survey Research
February 2000

POTOMAC
INCORPORATED

Commuting Behavior Research

Department of Public Works and Transportation
Division of Transit Services

Conducted February 2000

Table of Contents

Project Background 1-1

Executive Summary 2-1

Detailed Findings 3-1

Methodology 4-1

Discussion Outline 5-1

List of Participants 6-1

Moderator's Credentials 7-1

Quantitative Recommendation 8-1

Project Background

Project Background

In January 2000, the Montgomery County Department of Public Works and Transportation, Division of Transit Services (DTS), commissioned Potomac Survey Research, Inc. to undertake a program of focus group research to study the attitudes of commuters into downtown Bethesda and Friendship Heights, Maryland.

This project focuses on commuters who primarily drive their own Single Occupancy Vehicles (SOVs) into these two downtown areas to go to work. DTS wants to understand what specific actions or messages could persuade a share of these SOV commuters to begin using alternative means of transportation.

Potomac conducted a total of four focus groups in downtown Bethesda and Friendship Heights during February 2000 among this target group of commuters. Approximately 10 to 12 SOV commuters participated in each focus group session. Based on a discussion outline developed in consultation with a team comprised of personnel from DTS and the Bethesda Urban Partnership, our moderator facilitated each discussion to elicit participants' attitudes and behaviors on many important issues.

The focus group sessions examined the key advantages and disadvantages of driving to work, incentives and subsidies offered by employers, experience with parking rates and availability, impressions of various alternative forms of transportation such as Metrorail and Ride On, specific recommendations for improving the Ride On bus system, reactions to special amenities such as the "Bethesda 8" shuttle and the "Smart Card," and messages and motivations that would change participants' own commuting behavior. These group discussions surfaced a wealth of valuable information, summarized in the following pages of this report.

It is important to note that the results of focus group research are *qualitative* in nature. As such, they provide broad insight into awareness, attitudes, and opinions about the concepts and issues discussed. This research method is not intended to provide quantitatively precise data from which one can generalize to the total population of commuters.

Please also note that we did not find discernable differences between the views of the Bethesda and Friendship Heights participants in these focus groups. They held generally similar views on the issues we discussed. The obvious exception is the Bethesda 8 shuttle bus, which serves only downtown Bethesda.

As a follow-up to this focus group research, we recommend a quantitative phase be implemented to validate the findings described in this report among a statistically-representative sample of the commuting population.

In the Executive Summary section that follows, we have provided the most important findings gathered from the focus group phase of this study.

Executive Summary

Executive Summary

These are the most significant findings to emerge from this focus group research:

Traffic is a significant irritant for commuters. As commuters look ahead, they see the problem getting worse.

Commuters experience significant stress from driving to work on extremely congested roadways. They worry about the wear and tear on their vehicles, and they complain about the lack of courtesy and dangerous behavior of other drivers.

These commuters describe a worsening of these conditions in recent years, and they see the problem continuing to become more severe in the future.

Despite the disadvantages of traffic, Single Occupancy Vehicle (SOV) commuters state that they value the freedom and flexibility of driving their own car.

Insofar as traffic conditions permit, SOV commuters say they can go where they want, when they want. By contrast, most see mass transit as more restrictive because they must meet specific timetables and adhere to pre-determined routes that may not match their particular needs.

Increasingly, many busy commuters are combining shopping and other household errands with their daily commute. Their cars become storage facilities where they can keep their belongings and transport dry cleaning, groceries, and other items that they cannot imagine transporting by bus or train.

Furthermore, SOV commuters worry that mass transit would force them to spend too much time and effort planning just what items they can take to work and back home each day with the very limited carrying capacity they have on foot.

Most say that time favors driving, with the mode connections mass transit often requires making for a longer commute.

As a further significant benefit, SOV commuters are the kings and queens of their domain when traveling in their own vehicle. They can control their own environment, adjusting the temperature, listening to the radio station they want, altering their route to avoid traffic, all while eating breakfast if that is what they want.

By contrast, mass transit offers the specter of crowded trains and buses, unwanted social interactions (particularly early in the morning when they may not feel prepared to deal with other people), a lack of control over their own schedule, and restrictions on eating, loud music, and other personal pleasures.
As a notable exception, many of these dedicated SOV commuters say they strongly prefer Metrorail when they must travel into downtown Washington. They cite traffic

congestion and extremely expensive and unavailable parking as the key deterrents to driving.

Almost to a person, SOV commuters say the economics favor their decision to drive their own car to work.

In the Bethesda and Friendship Heights study areas, a significant majority of our interview subjects indicated that their employers subsidized all or a large part of their monthly parking expense. When compared to the daily cost of parking at a Metro station and paying a fare to ride a train or bus, the economics almost always seem to favor driving.

To throw the economic equation further out of balance, SOV commuters for the most part do not seem to include the cost of maintenance, insurance, or depreciation of their vehicles in their personal calculations. And in some cases, commuters clearly articulated that they did not include their gas, considering it a relatively insignificant expense. But all were acutely aware of the total cost of parking their cars at Metro and riding the train to their destination.

To compete more effectively with Single Occupancy Vehicles for a larger share of commuter travel, mass transit should try – where it can – to duplicate the convenience and economic advantages of driving.

As our moderator probed these SOV commuters' key motivations and decision factors, there emerged in every group a small handful of subjects who not only volunteered many ideas to improve the transit system but also seemed that they might actually be moved to change their own behavior as a result.

Foremost among these suggestions were these two powerful economic ideas:

1. **Lessen the tremendous incentive that employer-subsidized parking provides.**

   The economic scale is tipped heavily in one direction by employers who provide parking but no transit subsidy. Employers must be persuaded to be even-handed in providing mode-neutral transportation benefits.

   The County also has a significant role in setting monthly parking rates at the public lots and garages. The combination of parking lots at transit hubs charged at lower levels to encourage transit ridership, with garages in downtown employment centers charging significantly higher parking rates to discourage driving, would change some behavior. It must be noted again, however, that dedicated SOV commuters indicate that they are willing to pay substantially higher parking fees – much of which may be absorbed by their employers – before they will begin to leave their cars at home.

2. **Expand the "Smart Card" to be used throughout the transit system and in the public parking garages, making the system smoother and more seamless.**

   Convenience in paying the fare, and not needing to pull out cash on a daily basis are big selling points. The "Smart Card" is not currently well-known but is extremely well-received once described to these commuters, who avidly recommend that it should be available for use on buses and at parking facilities as well as on Metro. Providing one universally-accepted method of paying for transit could move some commuters.

Some important lessons can be learned from the Metrorail system.

Some commuters wonder why they would bother to take a bus to beat traffic, since buses are subject to the same vagaries that plague private vehicles. Metrorail is singled out as a fantastically-reliable system, with trains running as often as every two minutes, and largely immune to weather problems and traffic jams that affect everyone else.

Dedicated rights of way for buses, and more frequent head times on the main routes are steps that seem very much in tune with commuters' desires. A complete summary of commuters' recommendations along these lines begins on Page 3-11 of this report.

There is a significant education gap with regard to riding the bus, but this gap can be bridged.

Most SOV commuters do not even know how to approach the problem of figuring out how to catch the bus and take it successfully to their destination.

When presented with Ride On timetables, they seem generally able to read and understand them, but they ask for formatting changes to make them easier to use.

These commuters want maps that show them each bus stop. They want indicators at bus stops to tell them when the next bus is coming. And they want bus shelters that will keep them out of the weather.
Sophisticated Bethesda and Friendship Heights employees would turn to a Travelocity-style Internet site (now in the works) to help them plot bus trips across the County. When it is available, this Internet capability should be widely publicized.

Unfortunately, mass transit buses suffer from something of an image problem.

At varying levels, commuters worry about cleanliness problems, unfriendly drivers, small seats, diesel fumes, and crowding into the bus with people they admit do not

make them feel comfortable. These impressions are not deep-seated but do surface in every group as respondents begin to talk about "the type of people" they think ride the bus.

The one or two experienced Ride On customers in each group had generally positive stories to tell, indicating that the more familiar the public becomes with the system the more likely they are to view it positively. A broad-scale PR campaign aimed at personalizing Ride On and reversing these incomplete impressions should be a high priority.

In summary, SOV commuters in Bethesda and Friendship Heights have clearly-stated needs for their travel to and from work.

A large number of SOV commuters feel so strongly that the advantages of driving outweigh the traffic, stress, and costs of driving that they do not appear likely to change their mode of transportation anytime soon.

There are some commuters, however, who are actively weighing the factors influencing their commute and would potentially change their mode choice if some of these factors changed.

To know the size of this "swing" commuter group and the relative impact of each factor influencing their commuting decision, a quantitative survey measurement is needed as a follow-up to this study. Our recommendation for the next research phase is included later in this report.

In the "Detailed Findings" section that follows, we provide a more in-depth analysis of these broad observations.

Detailed Findings

Detailed Findings

Most of the reasons given for commuting to work by car center on the freedom and flexibility provided by this means of transportation.

Members talk about not having to wait for public transportation and being able to come and go when and where they want. This facilitates varied activities such as shopping and carrying articles in the car. The following are some illustrative comments:

> *You can go when you want, leave when you want.*
>
> *You can leave later in the morning when you drive.*
>
> *It's waiting for the transportation to get there because one time it took me an hour just to wait for a bus.*
>
> *Bus schedules are so sporadic.*
>
> *I try to do errands on the way home. I stop at the grocery store or the CVS, or the dry cleaners or something like that. I can't see doing that with public transportation.*
>
> *I haul stuff a lot to home and work and it's much easier when all I have to do is to go to my car in the lot and throw all my bundles in the car than it is to lug them, you know, back and forth.*

Other members talk about how they need their car to accommodate their schedules during and after work, and the need to travel to multiple destinations, many of which are not on established bus or train routes.

> *I have multiple destinations in the morning. Two kids to drop at places…it's just day care places and then to work so I couldn't really catch a train to all those places and still be at work.*
>
> *Oh, I live right near the Glenmont Metro. I can walk there in twenty minutes. But I have kids. I need to drop my daughter off. She's only a year old, so there's the equipment, the bottles, the diaper bag.*

Lack of convenience particularly emerged as a problematic feature of public transportation in the context of having to transfer back and forth from bus to train or from the Metrobus to Ride On.

This frustration with transfers from the Metrobus to Ride On was expressed by a regular bus commuter.

> *I take the Metro to the Silver Spring station, and then I take the Ride On from Silver Spring here but they don't coincide with each other. I have to wait a half hour once I get to the Silver Spring station.*

The inconvenience of parking at the outer Metro stops is an additional problem with two major components—being able to find a parking space at all or finding a space that respondents consider too far from the train station.

> *…from Shady Grove, if you don't get there early in the morning, you can't get a parking spot.*

> *…in the suburbs, there's nowhere to park your car at the Metro…(Parking spots are) taken unless you want to get there at the crack of dawn. At your normal hour, they're taken.*

Cost and commuting time are additional disincentives to using public transportation.

Cost emerges as a factor discouraging use of public transportation, especially for long commutes. For long distance commutes, public transportation is viewed as prohibitively expensive with parking fees, fares, and transfers. One member cited the $1.75 per day for parking at one of the Metro lots on top of the $3.10 fare each way. The comment that *"It's cheaper for me to drive and park than it is to catch the Metro"* is a typical one.

Participants are largely unaware of the discount options offered by Metrorail, Metrobus, and Ride On. But when they are given a booklet showing these discount options there is noticeable interest. Specifically there are positive comments about the Ride On 20-Trip Ticket and the Ride On Monthly Youth Cruiser Pass.

Time is another negative factor in using public transportation, with a number of participants saying that private transportation was significantly faster than public transportation, particularly buses. Another element of time was dissatisfaction with waiting time for public transportation, again particularly with reference to buses.

> *I can get to work a lot faster driving...in 25 minutes. If I have to go to the Metro, I'll probably have to drive almost 15 minutes to the Metro, park my car and walk to the Metro, and it takes about an hour.*

> *It takes me ten minutes to drive in…During rush hour it (the bus) would come every twenty to thirty minutes.*

Many of the commuters have to travel cross-county to get to work and for these commuters, time spent on public transportation becomes a significant problem because there are no direct rail routes linking the Montgomery County suburbs.

> *…there's not a direct route from Takoma to Bethesda. I'd have to go 45 minutes down and around the Red Line to take the Metro.*

> *…the problem with the Glenmont Metro, even though it's right there by my house, is it comes down into DC and back up. It's a big U. That's an hour. It's not direct.*

Members are aware of drawbacks of private transportation but believe these disadvantages are currently outweighed by the advantages.

Among the most often cited disadvantages of private transportation are traffic congestion and the stress of driving in heavy traffic. These problems are particularly aggravated during bad weather.

Other disadvantages center on the cost of driving a car, including wear and tear, and repairs—though it must be mentioned that most commuters do not factor maintenance and depreciation into their cost calculations.

Still others mention parking fees. However, a key factor offsetting the price of parking is the willingness of many employers to subsidize a large portion, if not all, of these commuters' parking costs.

Participants anticipate a worsening of the traffic situation but they do not currently envision it becoming bad enough to force them to give up private transportation.

When asked what they expect the traffic situation to be like in the near future, participants nearly unanimously expect it to become worse. They point to new construction in the area and see it as inevitably creating more traffic problems.

> *Right here in Bethesda it's only going to get worse. All you have to do is look at the cranes around here, and you know.*

Commuters' plans for dealing with the increased traffic, however, typically involve modifications such as leaving for work earlier. These drawbacks are not a sufficient disincentive to the use of cars most of the time. In fact, comments such as this one are fairly typical:

For me, congestion would have to get really, really bad before I gave up driving. I think I'd just get up earlier and sit in traffic longer.

Commuters realize that increasing traffic and higher parking costs will place more pressure on them to use public transportation. But both traffic and parking fees will have to increase substantially for them to consider this option. This is evident in the reaction of a Bethesda focus group to the moderator's query:

Moderator: *How many of you would possibly think of public transportation? When I say public, I mean all of these: Metro, the bus, Ride On, whatever, we'll call that "public transportation." How many of you would look at that as an alternative if your employer said "We're not paying for parking any longer?" 1, 2, 3 of you (out of 12 with free or subsidized parking).*

Most participants appear to feel that employers will subsidize any extra parking costs to retain employees. There was no disagreement when one focus group member said:

I also think that the economics of the job situation in the area are such that companies are going to continue to pay all, most, or some of their employees' parking to recruit and keep good employees.

One gets the clear sense from these focus group discussions that most employers do not go out of their way, financially or otherwise, to encourage public transportation use by their employees.

Views about modes of public transportation

Some insight into participants' views of public transportation can be gained by their perceptions of people who use public transportation. Among these Single Occupancy Vehicle (SOV) commuters, some of the images of the "typical" public transportation user are characteristics like discipline and punctuality.

However, the "profile" of the public transportation user that also emerges is that of a disadvantaged "second class" commuter – people who don't have a car or can't afford one – people, in other words, without any other choice.

This perceived lack of freedom, convenience, flexibility and choice by public transportation users is evident in a number of comments.

They have to think about it. They have to plan ahead.

I know that people in my office work late too. And they are like, you know, "I've got to make sure I catch the last train." You know, "I've got to make sure I do this or that," whereas I don't really plan. I leave when I want to leave.

…with your car, you've just got all your stuff in it with you, and it's the convenience of having all your junk out there if you need it. But on the Metro, you really have to think about what you can carry with you…you always make sure you're not carrying a lot of stuff.

I think you always see public transportation as something you had to do and not as a preferred alternative.

As a not-so-subtle subtext, many respondents express some concern or distaste for the type of people they may have to interact with on the bus.

You have people that are coughing and sneezing and smelling, and there's a bag lady on the bus.

…I've been on a bus and trains many times and you get some weird people…

…a lot of strange people riding the bus…

All of the focus group members have at some time used public transportation. Perceptions about the Metrorail are mostly positive while those about buses are somewhat more negative.

A number of respondents are quite positive toward the Metrorail system, viewing it as clean, on-time, dependable, less stressful than driving, and easy to use. Some typical comments are:

I think it's somewhat relaxing myself.

It's a pleasure

…you go so fast.

The reason you don't notice delays in the Metro is they're running every six minutes or every two minutes. So it's great really.

It's a better-looking group (of Metro riders) in general than (in) some of the subways you'll see in New York.
It's clean, it's easy.

Once you're on the Metro you are just so free. And what appealed to me was you could sit and read the paper. You can listen to your Walkman. You can read a book…you can get work done…I can use that time productively.

…when we had that minor Tuesday snowstorm, the only thing that got through was the Metro…They didn't sit in traffic for four hours like I did.

And down in the station area, unlike in New York City where it can just be blistering hot down in the stations in July and August, it's air-conditioned, it's cool. The acoustics are fine.

A number of others, however, complain about difficulty finding parking and crowding at rush hour, and feel uncomfortable with the enforced close contact with other passengers. A number of participants raise safety concerns, particularly at the outer stops like Shady Grove. Some people mention car break-ins. Another voices concern about having to walk the sometimes considerable distance from the train platform to where his car is parked.

All I picture is hassle. I have to drive to the Metro stop, park there. I know I would get a space way in the back if at all and walk a mile to the stop and then deal with crowds. And in the morning, the last thing I want is having people close to me.

I parked at the Landover station and I came out and there were all these cars being broken into. There was a Lexus sitting there with no doors on it.

You're coming home 9 o'clock at night. Your car's sitting there in a lone spot in the Metro. You never know.

Perceptions of buses are more negative. There are complaints of crowding, small seats, infrequent schedules, long waits and lack of dependability, especially in bad traffic or bad weather.

The buses are definitely crowded and not only that, the seats were made for people thirty years ago. They're small, they're narrow. Some of the older buses, your knees come right up against the back of the seat. It's really uncomfortable. My experience in this last storm was most of the time they were on time but occasionally, there was one that was completely missing so you waited an extra half hour.

There are additional complaints about cleanliness of buses and lack of courtesy by bus drivers. People appear to make distinctions about cleanliness, comfort, crowding, and types of passengers depending on the location of the bus route.

The Ride On that I take goes through Chevy Chase, and there are a lot of businessmen that take that bus in the morning.

Carpooling has little appeal

These commuters see in carpooling a loss of flexibility, convenience and autonomy in the need to adhere to a fixed schedule and accommodate other drivers.

> *I would feel uncomfortable depending on someone else being ready on time so I can be at work on time.*
>
> *...you have to rely on too many factors that are too erratic.*
>
> *You live on someone else's schedule.*
>
> *I like driving and I like being in control. I listen to the radio, turn up the heat, turn down the heat, open the window. I like being in control of that.*

Bethesda 8 is not well-known but elicits a positive response.

Most of the Bethesda focus group participants were not aware of this service but they are interested in the concept. The fact that it is free is particularly appealing. People say they would use it during lunch in place of their own car for shopping or errands.

Bus Timetables/Maps

The Ride On schedule receives a generally positive, if not enthusiastic, reception. Commuters find the map of the route on the back helpful but a number of people note that the map does not indicate where the bus stops, and think that would make the map even more helpful. One participant complains about having to "twist and turn" the map to read the times and the bus stops. Some participants suggest that the schedule might be difficult to read for older people because of the small print.

The Palm Tran schedule (an alternative format from a Florida jurisdiction) is much more popular than the Ride On schedule. Participants note the larger print, better graphics, glossy paper and layout make it more appealing and much easier to read. There is a similar complaint, however, that the map on the back of the schedule does not indicate where the bus stops.

Participants feel the large map contains much more detailed information about the bus routes than the map on the Ride On schedule. They note, however, that it does not indicate bus stops or scheduled stop times for the buses.

> *I have no idea. Does the bus stop anywhere up there or does the bus only stop at these places?*

Okay, I live up here and this bus zooms all around here but where do I get on it if I live here?

I still don't see any stops.

The Arlington County book, containing multiple bus schedules, maps, and timetables, is viewed as a very helpful reference book but not particularly convenient or handy. Participants seem in general to be much more comfortable using the Metro than using the bus system. They find the Metro easier and more "customer friendly" noting "You can always tell what fare it is and the maps are so easy to read." For buses, by contrast, "Here, everything is guess work."

Participants are enthusiastic about the Smart Card

The moderator introduced focus group members to the Metrorail "Smart Card," explaining that it costs an initial $5 to buy the card which can then be "loaded" up with fare money. It can be "swiped" while going through the turnstile or read through the user's pocket or pocket book.

There is low familiarity with the Smart Card but the concept is exceptionally well received. Participants are very enthusiastic about expanding the card so it can be used on both bus and Metro routes as well as for parking at Metro stops.

It would be perfect.

Especially in bad weather when people are standing out, and somebody is fumbling and trying to find change.

That would be great.

That would be wonderful.

Knowing that the card can be linked to a debit or credit card for convenient payment closes the deal for this commuter:

I'm done. I'm taking it tomorrow.

How to Motivate People to Take Public Transportation

Throughout the focus groups, respondents offered many clues to changes that might motivate them to take public transportation. First and foremost, commuters are looking for convenience and cost advantages. As a step in making the Metro system more convenient, they suggest free transfers from buses to Metrorail in addition to free

transfers from Metrorail to buses. Participants appear to want a more unified, consolidated public transit system.

As noted earlier, many participants view the Metro as prohibitively expensive, especially for long-distance commutes, and think that fares need to be reduced. In this context, some participants suggest a flat fee for the Metro in place of the current system. It might also be beneficial to publicize more widely the discount fares offered by Metrorail, Metrobus, and Ride On.

They are receptive toward one monthly fee that covers parking costs in addition to transportation to and from work. The option of parking and riding on one card is appealing.

There is a perceived need for more parking spaces at the outer Metro stops.

Shortening commuting time on public transportation would also make it more appealing. In this context, people suggest express trains, a Beltway Metro directly connecting suburban areas, and express buses. As one respondent put it:

> *I need to get a stop that takes me from a place in suburban Maryland to another place in suburban Maryland without having to go down and around into the District.*

The Division of Transit Services (DTS) may want to institute greater publicity and education about public transit options in the Montgomery County area targeting communications at home and at the workplace. As one participant noted:

> *This is such a transient area that huge amounts of population move in and out every four years and don't have enough time to learn about it, to educate themselves or get used to it and they move on. So I think just from a marketing point of view, if I walked in on the first day of the job, you know orientation, and they handed me all these things, "Here's a way to get from your home to this office," I probably would have done it.*

Another participant commented:

> *When I moved into the community that I live in now, when I bought my condo, they, along with the welcome packet, gave me every Metro and Ride On that would go within that community where we wanted to go. So I thought that would be great for people who move into new homes.*

Still another commented:

> *I would just suggest more ads on television to really publicize that this stuff is available. I've heard about it through the grapevine but I haven't a clue about how it works or where I would get it and it's right in my neighborhood.*

In terms of negative reinforcement, parking fees for garages would have to be increased substantially for people to change from private to public transportation according to our participants. A small increase will not do it; parking rates would need to rise to well over $100 per month to have much of an impact. Most commuters appear convinced that their employers will absorb most of an increase.

Finally, in the case of buses, it is difficult to get people to make a tradeoff between buses that run more frequently on main thoroughfares vs. buses that run less frequently but wind through neighborhoods closer to homes. Most people will opt for more frequent stops along the main route but stress that it can't be too far from where they live.

Specific Suggestions by Focus Group Participants for Encouraging Greater Use of Mass Transit

These suggestions arose in the groups. We list them without our own comments or analysis.

Buses

Access

- More buses and more frequent stops along bus routes to reduce waiting time for buses.
- Run more express buses between suburban hub areas.
- Have better coordination of schedules between Ride On and Metrobus.
- Longer hours of operation for buses.
- Duplicate the dedicated right of way advantage of Metrorail through special bus lanes, synchronized lights, etc.
- At each bus stop provide an indication of when the next bus will arrive.

Comfort/cleanliness

- There were complaints that some of the older buses have narrow, confining, and uncomfortable seats. Upgrade these older buses to newer, roomier, more comfortable ones.
- Improve cleanliness of the buses.
- Reduce crowding on buses.
- Provide shelters to protect against bad weather.

Cost

- Have free transfers from buses to the Metrorail in addition to the current free transfers from Metrorail to buses.
- Lower fares for bus service, offer transit flat monthly fees for unlimited use and other types of discount tickets.
- Encourage employers to subsidize transit ridership to at least as great an extent as they now subsidize single vehicle use.
- Provide tax incentives for people who take the bus to work.

Advertising/public relations/communications

- Run more advertising about commuter bus routes. Send a targeted mailing of current bus schedules and bus routes running in commuters' own geographic area.
- Increase awareness of packaged bus fare programs offering unlimited trips over a given time period for a fixed price. Publicize different types of discount tickets.
- Publicize Metro information number and DTS web site for information about bus routes and schedules.
- Provide more publicity for Bethesda 8 free daytime commuter bus. Link that promotion with the idea that the Bethesda 8 is intended to increase Metrorail commuting.
- Promote bus usage as a way to reduce toxic emissions and benefit the environment.

Other

- Post bus routes at every bus stop.
- Improve courtesy and interpersonal manners of bus drivers. Give them customer service training.

Metro

Access

- Increase size of lots at outer Metro stops to improve availability of parking.
- Build mass transit beltway (Purple Line) to provide a more direct route to suburban hub areas, or build Bethesda/Silver Spring trolley.
- Institute express trains.
- Provide longer hours of operation for the Metro.
- Run Metro trains more often on "off-peak" hours.

Cost

- Reduce the cost of the Metro, especially for long distance commutes. Institute and publicize flat fare for unlimited use by the day, week or month.
- Reduce parking fees at Metro lots.
- Institute one monthly fee that covers parking costs as well as transportation to and from work.
- Provide tax incentives for people who take the Metro to work.
- Encourage employers to subsidize Metro ridership to at least as great an extent as they now subsidize single vehicle use.

Advertising/public relations/communications

- Promote discounted fare options.
- Give out refrigerator magnet with Metro routes on it.
- Promote Metro usage as a way to reduce toxic emissions and benefit the environment.
- Promote the Smart Card and consider expanding it to cover fares for buses and costs for parking as well. Consider waiving the initial $5 fee for the card and provide it free or at a discount if the user invested a minimum dollar amount.

Maps and Schedules

- Use the power of the Internet to chart intra-county bus trips.
- Consider larger font sizes on Ride On timetables.
- Produce a large, detailed bus map that folds easily into a small package.

Methodology

Methodology

A focus group is a round-table discussion with six to twelve representatives of a selected target audience or customer segment. The discussion is facilitated by a professional "moderator" who is trained in consumer behavior theories, marketing principles, and group dynamics. The moderator uses his or her skills to question, probe, and clarify responses, while encouraging participation from all members of the group. The moderator regulates the flow of conversation to cover all relevant areas of interest to the client.

Participants in the group are encouraged to relate to each other, share attitudes, and provide candid opinions regarding the topics presented to them by the moderator or generated by the dynamics of the group. This technique is especially useful for gathering in-depth information on a topic. It allows for wide-ranging responses to open-ended questions.

The focus groups are organized so as to bring together people with like experiences. For the most part, this research strives to find commonality among participants, in order to discover shared answers or clues to the core questions being researched. Grouping people with a similar experience or point of view has the added benefit of creating a comfort level for members of the group and therefore encourages maximum participation.

Recruitment

We conducted a total of four focus groups. To meet the project objectives, we sought discussion participants who matched these two criteria:

1. Work in "downtown" Bethesda (the Central Business District) or Friendship Heights, Maryland.
2. Use their own car and drive alone as their primary means of commuting to work.

In addition to these two key characteristics, we searched for participants who exhibited at least some openness to using transit. The recruitment process weeded out people who were totally hostile to transit and would never use it for any reason – not a productive group for this study.

Recruitment was a two-stage process. First, we "intercepted" pedestrians at several locations in downtown Bethesda and Friendship Heights during a two-week period in order to pre-qualify a large pool of potential focus group participants. The pre-screening questionnaire used for that process is found at the end of this section.

We then telephoned each pre-screened individual and used a more thorough screening questionnaire to identify people appropriate for each group. That screening questionnaire is also found at the conclusion of this section.

In each group, we sought a cross-section of demographic and occupational characteristics. Two focus groups each were recruited among Bethesda and Friendship Heights commuters. The schedule of the groups was as follows:

Bethesda commuters	February 9	6:00 PM
Friendship Heights commuters	February 10	1:00 PM
Friendship Heights commuters	February 23	6:00 PM
Bethesda commuters	February 23	8:00 PM

Discussion Outline

In consultation with DPWT, Potomac Incorporated developed a moderator's discussion outline to guide discussion in each of the group sessions. Following the focus group discussions held on February 9 and 10, the original discussion outline was revised to explore some topics in greater detail as well as to cover some additional topics.

Copies of the two discussion outlines, along with the professional credentials of our moderator, Wayne Jacobs, are included in the Discussion Outline and Moderator's Credentials section.

Statement of Limitations

In market research, the focus group approach seeks to develop insight and direction rather than quantitatively precise or absolute numbers. Because of the limited number of respondents and the restrictions of recruiting, this research must be considered strictly qualitative in nature. This type of research is intended to provide a first step in determining knowledge, awareness, attitudes, and opinions about the concepts and issues tested.

The reader may find some statements made by participants that seem inconsistent with the reader's knowledge of the subject matter. When such data appear in the research findings, it should be considered as valid data from the participant's point of view.

The following biases are inherent in this type of study and are stated here as a reminder that the data presented here cannot be quantified and directly projected onto the overall universe of active and inactive alumni.

- Participants tend to be risk-takers and may be somewhat more assertive than non-participants.

- Participants may be more articulate and willing to express opinions in a group than non-participants.

- Participants include only those people who were available on the day or night the group was scheduled, and only those who were willing to travel to the discussion site.

- People in groups may respond differently to a question than if asked that same question individually. They may follow the lead of a strong speaker or someone they perceive as an "expert."

Finally the written report cannot accurately detail the wealth of non-verbal information (for example, body language, posture, hand gestures), or the amount of time lapsed between the questions from the moderator and responses from the group. It also cannot report on the subtle area of "peer pressure"—the unwillingness to make a particular response because of the fear of what others might think, or quickly changing a response when others in the group appear to oppose a particular position.

In light of these limitations, which accompany qualitative research, it is important to review this material giving attention to those areas where there is substantial consensus or where especially strong reactions to the subject matter occur. In that context, this research provides a number of clear and compelling conclusions.

We have summarized these conclusions in the Executive Summary section of this report. Detailed Findings provides a more thorough, point-by-point analysis of the focus group findings. Complete, unedited transcripts of each group discussion are found in the supplemental volume, which accompanies this report. Potomac is providing these as an added benefit for your evaluation of the focus groups.

Discussion Outline

Topical Outline
Montgomery County Transit
Draft #2 2/10/00

1. Introduction

1.1 Overview and purpose
- a. This group session is a market research process for getting peoples thoughts and opinions directly.
- b. You were randomly selected among people who work in Bethesda/Friendship Heights.

1.2 Goals and responsibilities
- a. This will be an open discussion and exchange of ideas
- b. Speak out, agree, disagree
- c. Please speak one at a time
- d. Session is being recorded so I do not have to take so many notes

1.3 Participant introduction
- a. Name
- b. Employment
- c. Profile of your lifestyle

1.4 Topic introduction

I would like to talk about getting to work. That's how you get to work each day.

2. Current Transportation Practices

2.1 Each of you was asked to be here because you use private transportation to get to work each day. Lets see if we can explore why. What are the reasons you choose this method of getting to work? (List and discuss each; brainstorming mode)
- a. Independence
- b. Limited understanding of mass transit
- c. Other

2.2 What part does your employer play in your decision of how to get to work?
- a. Does your employer encourage you one way or the other?
- b. What does your employer provide to assist you in driving your personal vehicle?
  - Free/subsidized parking
  - Flex hours to avoid traffic
- c. What does your employer do to assist those using public transportation?
  - Subsidized fares
  - Shuttle to Metro

2.3 What are the disadvantages of driving your own vehicle to work? (List)
- a. Cost of parking
  - What do you pay for parking?
  - How will your attitude change when cost goes up? Threshold?
- b. Finding a place to park
- c. Traffic congestion
  - How do you weigh cost vs. time?
- d. Wear and tear
- e. Stress

3. Transportation Past and Future

3.1 How has the way you get to work in Bethesda/Friendship Heights changed over the past few years?

3.2 Do you see your method of commuting to and from work in the Bethesda/Friendship Heights area changing in the future?
- a. When?
- b. Why?
  - Improved mass transit

- Traffic congestion getting worse
- Costs (Parking, insurance, family need for car)
- Look for car pool

3.3 How do you get information about your commute?

a. TV, Radio
b. Internet (Frequency)

4. Work Commute Alternatives

4.1 Give me a description of the person who uses public transportation to get to work in Bethesda/Friendship Heights. (Explore image, demos, etc.)

4.2 What forms of public transportation are you familiar with that you could use to get to work? (List)

a. Metro System Train
b. Bus System (Metro bus, Montgomery Ride-on, Fairfax Connector, Alexandria Dash, etc.)
c. Express Bus (Gaithersburg, Tysons)

4.3 Have you ever used any of these?

a. On what occasion?
b. Do any of your coworkers use mass transit to work?

4.4 What is your image of each? (Explore)

a. Attitude
b. Cost
c. Frequency, reliability
d. Comfort, crowded, stress
e. Convenience to home, to work
f. Park and ride areas available, safe, etc.
g. Bus shelters safe
h. Use of fare card machines
i. Information, timetables, knowledge of stops

4.5 Explore Metro train:

a. What is better about the train? Frequency, dependability, image?
b. If employer would buy down the cost would you use more often?

4.6 Explore bus image:

a. Relationship with driver/driver courtesy
b. Improvements to buses themselves
c. Other issues

4.7 Do you think you know how to use public transportation? That is where to get on, cost, using the fair machines, obtaining and reading schedules.

a. Handout and review schedule, maps, etc. (Give exercise)
b. Review alternatives
c. Bethesda 8
d. Smart Card ($5 and add to $200)

4.8 What is your perception of ---

a. Carpooling
    - What would make it more attractive?
    - "X" min faster, more HOV lanes, closer parking space to work, lower parking price?
b. Vanpool
c. Telecommuting
d. Walking/biking (Would you move for this convenience?)

5. Getting More People to Use Mass Transit

5.1 If it were your responsibility to get more people - even yourself - to use the Metro and the bus to get to work, what alterations do you think would be necessary? (Unaided, then test options)

a. Buses: run more frequently or run close to your home
    - ¼ mile or 4 block walk vs. double frequency

- Interior modifications
- Special bus – Clean air, natural gas – look like trolley

b. Lower transit fee
- One fare for Ride-on - $1.10
- 28 day unlimited use - $100

c. Raising parking fees and meter fees
d. More education
e. Greater feeling of safety
f. Easier payment method (By mode)
g. Internet (Travelocity concept)

5.2 Do you have any experience or knowledge of what other systems in other cities are doing?
5.3 Are you aware of the various commuter programs offered?

a. Transit fare options
e. Fare simplification

6. Now lets spend a few minutes putting all the things we have learned into a message that will help change people's commuting patterns in the future.

6.1 What is the strongest message we have discussed? What would impact you?
6.2 What is the weakest message?
6.3 How can we get the message out to people?

a. Media preferred
b. Internet

Topical Outline
Montgomery County Transit
Draft #2 2/10/00

1. Introduction

1.1 Overview and purpose
- a. This group session is a market research process for getting peoples thoughts and opinions directly.
- b. You were randomly selected among people who work in Bethesda/Friendship Heights.

1.2 Goals and responsibilities
- a. This will be an open discussion and exchange of ideas
- b. Speak out, agree, disagree
- c. Please speak one at a time
- d. Session is being recorded so I do not have to take so many notes

1.3 Participant introduction
- a. Name
- b. Employment
- c. Profile of your lifestyle

1.4 Topic introduction

I would like to talk about getting to work. That's how you get to work each day.

2. Current Transportation Practices

2.1 Each of you was asked to be here because you use private transportation to get to work each day. Lets see if we can explore why. What are the reasons you choose this method of getting to work? (List and discuss each; brainstorming mode)
- a. Independence
- b. Limited understanding of mass transit
- c. Other

2.2 What part does your employer play in your decision of how to get to work?
- a. Does your employer encourage you one way or the other?
- b. What does your employer provide to assist you in driving your personal vehicle?
  - Free/subsidized parking
  - Flex hours to avoid traffic
- c. What does your employer do to assist those using public transportation?
  - Subsidized fares
  - Shuttle to Metro

2.3 What are the disadvantages of driving your own vehicle to work? (List)
- a. Cost of parking
  - What do you pay for parking?
  - How will your attitude change when cost goes up? Threshold?
- b. Finding a place to park
- c. Traffic congestion
  - How do you weigh cost vs. time?
- d. Wear and tear
- e. Stress

3. Transportation Past and Future

3.1 How has the way you get to work in Bethesda/Friendship Heights changed over the past few years?

3.2 Do you see your method of commuting to and from work in the Bethesda/Friendship Heights area changing in the future?
- a. When?
- b. Why?
  - Improved mass transit

- Traffic congestion getting worse
- Costs (Parking, insurance, family need for car)
- Look for car pool

3.3 How do you get information about your commute?

a. TV, Radio
b. Internet (Frequency)

4. Work Commute Alternatives

4.1 Give me a description of the person who uses public transportation to get to work in Bethesda/Friendship Heights. (Explore image, demos, etc.)

4.2 What forms of public transportation are you familiar with that you could use to get to work? (List)

a. Metro System Train
b. Bus System (Metro bus, Montgomery Ride-on, Fairfax Connector, Alexandria Dash, etc.)
c. Express Bus (Gaithersburg, Tysons)

4.3 Have you ever used any of these?

a. On what occasion?
b. Do any of your coworkers use mass transit to work?

4.4 What is your image of each? (Explore)

a. Attitude
b. Cost
c. Frequency, reliability
d. Comfort, crowded, stress
e. Convenience to home, to work
f. Park and ride areas available, safe, etc.
g. Bus shelters safe
h. Use of fare card machines
i. Information, timetables, knowledge of stops

4.5 Explore Metro train:

a. What is better about the train? Frequency, dependability, image?
b. If employer would buy down the cost would you use more often?

4.6 Explore bus image:

a. Relationship with driver/driver courtesy
b. Improvements to buses themselves
c. Other issues

4.7 Do you think you know how to use public transportation? That is where to get on, cost, using the fair machines, obtaining and reading schedules.

a. Handout and review schedule, maps, etc. (Give exercise)
b. Review alternatives
c. Bethesda 8
d. Smart Card ($5 and add to $200)

4.8 What is your perception of ---

a. Carpooling
    - What would make it more attractive?
    - "X" min faster, more HOV lanes, closer parking space to work, lower parking price?
b. Vanpool
c. Telecommuting
d. Walking/biking (Would you move for this convenience?)

5. Getting More People to Use Mass Transit

5.1 If it were your responsibility to get more people - even yourself - to use the Metro and the bus to get to work, what alterations do you think would be necessary? (Unaided, then test options)

a. Buses: run more frequently or run close to your home
    - ¼ mile or 4 block walk vs. double frequency

- Interior modifications
- Special bus – Clean air, natural gas – look like trolley

b. Lower transit fee
- One fare for Ride-on - $1.10
- 28 day unlimited use - $100

c. Raising parking fees and meter fees
d. More education
e. Greater feeling of safety
f. Easier payment method (By mode)
g. Internet (Travelocity concept)

5.2 Do you have any experience or knowledge of what other systems in other cities are doing?
5.3 Are you aware of the various commuter programs offered?

a. Transit fare options
e. Fare simplification

6. Now lets spend a few minutes putting all the things we have learned into a message that will help change people's commuting patterns in the future.

6.1 What is the strongest message we have discussed? What would impact you?
6.2 What is the weakest message?
6.3 How can we get the message out to people?

a. Media preferred
b. Internet

List of Participants

Wednesday, February 9, 2000
6:00 p.m. – *Bethesda*

Name	Gender	Age Range	Ethnicity	Income
Philip	Male	36-45	Caucasian	$80K+
Elizabeth	Female	36-45	African-American	$50K-$59K
Jesse	Male	26-35	African-American	$40K-$49K
MaryAnn	Female	46-54	Caucasian	$80K+
Paul	Male	55+	Caucasian	$40K-$49K
Jim	Male	46-54	Caucasian	$50K-$59K
Joel	Male	46-54	Caucasian	$30K-$39K
Mike	Male	55+	Caucasian	$80K+
Chuck	Male	26-35	Caucasian	$70K-$80K
Susan	Female	36-45	Caucasian	$80K+

Thursday, February 10, 2000
1:00 p.m. – *Friendship Heights*

Name	Gender	Age Range	Ethnicity	Income
Paige	Female	36-45	African-American	$60K-$70K
Carol	Female	36-45	African-American	$40K-$49K
Robert	Male	26-35	African-American	$50K-$59K
Ben	Male	26-35	Caucasian	$60K-$69K
Kathlene	Female	46-54	African-American	$40K-$49K
Marie	Female	55+	Hispanic	$60K-$69K
Bridget	Female	26-35	Caucasian	$20K-$30K
Shelley	Female	26-35	Caucasian	$70K-$80K
Donna	Female	46-54	Caucasian	$40K-$49K

Wednesday, February 23, 2000
6:00 p.m. – *Friendship Heights*

Name	Gender	Age Range	Ethnicity	Income
Janet	Female	36-45	Caucasian	$50K-$59K
Maria	Female	26-35	Portuguese	$30K-$39K
Eduardo	Male	46-54	Hispanic	$70K-$80K
Shelton	Male	55+	Caucasian	$80K+
Maria	Female	36-45	African-American	$40K-$49K
Debbie	Female	36-45	Caucasian	$30K-$39K
Christine	Female	36-45	African-American	$40K-$49K
Patti	Female	55+	Caucasian	$40K-$49K
Jim	Male	26-35	Caucasian	$30K-$39K
Jack	Male	36-45	Caucasian	$70K-$80K

Wednesday, February 23, 2000
8:00 p.m. – *Bethesda*

Name	Gender	Age Range	Ethnicity	Income
Darlene	Female	36-45	Caucasian	$20K-$29K
Jennifer	Female	26-35	Caucasian	$80K+
Sandra	Female	46-54	African-American	$40K-$49K
Dabington	Male	26-35	African-American	$50K-$59K
Jacqueline	Female	26-35	Caucasian	$80K+
Lawrence	Male	46-54	African-American	$80K+
Carol	Female	46-54	Caucasian	$80K+
Rebecca	Female	24	Caucasian	$30K-$39K
Margie	Female	36-45	Caucasian	$80K+
Wayne	Male	26-35	African-American	$60K-$69K
Eric	Male	26-35	Caucasian	$80K+
Vanessa	Female	36-45	African-American	$80K+

Moderator's Credentials

Moderator's Credentials

Wayne Jacobs has worked on numerous projects for Potomac Survey Research, including moderating and reporting on an extensive series of focus groups for Allegheny Power (1997 and 1998); Montgomery County Department of Public Works and Transportation, Division of Solid Waste Services (1998 and 1999); Gazette Papers (1998); the National Institute of Standards and Technology, Advanced Technology Program (1998), and the Greater Washington Board of Trade (1999).

Mr. Jacobs has served as Director of Research for an international marketing and market research company. With a professional background including The Bendix Corporation and the Chrysler Corporation, Mr. Jacobs is also a much-published author of research and international marketing studies. With concentrations in technology, association management and real estate, Mr. Jacobs has performed "state-of-the-industry" studies for clients such as the Consumer Electronics Industry, the Business Products Industry, the Manufacturing Technology Industry, and segments of the Residential/Commercial Remodeling Industry.

A brief list of Mr. Jacobs' clientele includes: The Internal Revenue Service, ITT Community Development, Weyerhaeuser, Winchester Land, Wintergreen, Reston, Exxon Company USA, and Ryland Group. He has also worked with numerous membership associations such as: American Association of Retired Persons, American Diabetes Association, American Lung Association, Electronics Industry Association, Food Marketing Institute, International Association for Manufacturing Technology, National Home Builders Association, Remodelers Association, and the Urban Land Institute.

Mr. Jacobs is a member of numerous professional associations including: the American Marketing Association (Past Presidents Council); American Red Cross (Market Research Advisor); International Association of Exhibit Managers; and the Marketing Research Association.

Quantitative Study Recommendation

Quantitative Recommendations

This report represents the completion of the qualitative phase of the study of commuting patterns into downtown Bethesda and Friendship Heights. Through these focus groups – as is typical of all qualitative research – we have identified feelings, impressions, and attitudes held by commuters, but we cannot generalize these impressions onto the overall population of commuters in Montgomery County.

To determine how widely-held are these feelings, the Division of Transit Services (DTS) must undertake a quantitative survey as its next step. Such a research effort will seek to determine an approximate number of commuters who share the opinions expressed by our focus group respondents. Ideas can be tested for intensity of support and can be compared to each other in terms of their viability in the public's mind.

Research Objectives

In discussions with Potomac, DTS staff have stated these objectives for the quantitative research phase:

- Examine these issues countywide, not just in the downtown Bethesda and Friendship Heights areas.
- Provide a large enough sample size that results may be broken down by geographic area within the County.
- Segment the sample to identify the commuter subgroups that are most likely to alter their commuting behavior. The research would test for responses to new conditions (e.g., worsening traffic, cost escalations, etc.), as well as responses to specific actions by DTS to improve mass transit as an option for commuters.
- Design a survey instrument that will pose real trade-offs and provide meaningful data on a variety of important issues.
- Keep the project within an overall budget.

Recommendations

In light of these overriding objectives and our experience conducting survey research on transportation issues in this region, we are recommending the following specifications for the quantitative survey:

1. Interview only residents of Montgomery County, as the population DTS is most able to impact.

2. Conduct the survey interviews by telephone as the most reliable means of ensuring a broad-based, random sample of the County's commuters.

3. Sample 1,000 commuters countywide; this will yield a countywide margin of sampling error of ±3.2% at a 95% confidence level.

4. Conduct an interview of at least eight minutes in length in order to examine adequately the issues at hand.

5. Use a random-digit sampling technique in order to remove biases that can result from sampling only consumers with "listed" telephone numbers.

6. Prior to full-scale interviewing, conduct a survey "pre-test" of 25 interviews to ensure that the sampling technique and questionnaire are both working properly. As part of this process, monitor telephone calls (i.e., listen in) to confirm that each question is being properly understood by respondents and that the response options accurately capture the full range of possible answers.

7. Following the pre-test, do not include that test data in the final sample if any changes are required to the survey instrument or sampling technique.

8. "Live-dial" each telephone call rather than using a predictive dialer, so as to minimize non-response bias. Computerized dialers lower interviewing costs but produce a noticeable hiss and pause that damage the critical rapport at the outset of the telephone call and therefore cause higher refusal and non-participation rates.

9. As the first step in each interview, screen respondents to ensure that they commute to work on a regular basis; interview only those who commute to work at least several times per week.

10. Collect the survey responses using a CATI ("Computer-Assisted Telephone Interviewing") system to minimize interviewer error, skipped questions, and data input errors.

11. As a standard practice, verify ten percent of the survey contacts through supervisor callbacks to confirm that the interview took place.

12. Maintain a supervisor-to-interviewer ratio of at least 1:4, and monitor telephone calls to ensure the highest possible level of quality and consistency among the interviews.

13. If necessary, weight the final survey data to reflect the actual population of commuters as they are distributed across the County.

Interview Topics

The survey questionnaire should examine these important specific issues:

- Basic attitudes towards commuting.
- Individual commuting patterns.
- Key motivations for driving vs. considering alternative modes.
- Level of awareness of important current offerings: Internet site, fare packages, employer programs.
- Impact of specific economic assumptions: adjusted parking fees, alternative transit fare structures, and other cost models tested at various price points.
- Appeal of specific modifications in Ride On operations: modified buses, dedicated bus lanes, synchronized traffic signals, more frequent head times.
- Demographic characteristics.

Reporting

This quantitative phase should be completed within 30 days of the authorization to proceed by DTS, in order to provide the greatest possible continuity between the two research phases.

The survey report should include a narrative summary including the main ideas emanating from the survey data, along with color charts suitable for presentation.

The report should also provide a complete data summary, including results cross-tabulated by geography, demographic characteristics, commuting patterns, occupational codes, and key attitudes.

Potomac would welcome the opportunity to work with DTS on the next phase of this important research project.