getDowntown

Commuting to Downtown Ann Arbor
Surveys of Employers and Employees 2011

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GetDowntown Survey, 2011
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Introduction
Background

Two surveys were conducted for getDowntown in 2011, one of downtown Ann Arbor employers and the other of employees of some of those employers.

Each survey was based on the database of downtown organizations maintained by getDowntown. There are not random sample surveys. All organizations with a listing in the getDowntown database that included a contact person and contact information were invited to participate. Participation was voluntary and not incentivized.

The survey follows up on earlier surveys that produced similar data. However the current report presents a more comprehensive view of the results and presents it in a graphical manner. There are many differences between the survey of 2011 and those of earlier years, in the questions asked and the skip patterns used to control the flow of the questionnaire. In addition, the data from earlier years was not weighted to norms of the database. Thus its representation of the database at that time is unknown. For these and other reasons, comparisons between the 2011 survey and previous surveys are tenuous except in certain cases. Thus the focus in this report is on only 2011 results and not on inter-year comparisons, although there are a few exceptions meant to put the data in perspective for those interested in comparing findings in earlier documents to findings here.

Further individual item comparisons between 2011 and earlier years can be provided as requested by getDowntown. This will be feasible only when the questions asked were asked of the same types of persons and asked in the same manner.

Prior to the survey, a substantial amount of programming had to be performed in order to combine and adapt the getDowntown Microsoft Access database and other information, integrating two types of data into a single file that could be manipulated for sampling and mailing.

The database is oriented to the employer, not to the employee. At the time of the survey, there were approximately 1,200 organizations in the database. Some had participated in getDowntown services (e.g., purchased go!passes) while others had not. All were located in downtown Ann Arbor. Some had email addresses for contacting them while others did not.

An online survey was created to collect the information. An email invitation was sent to all organizations with a named contact person and an email address. The balance were mailed a letter over the signature of the director of getDowntown, Nancy Shore, requesting that they participate. In the letter a simplified link to the survey was provided that would be easy to remember and to type (www.getdowntown/survey).

Three reminder emails were sent to all non-responding employers. Telephone reminder calls were made to all employers who had not responded after the reminders. If contact was made, the persons making the calls (professional interviewers) asked whether they could conduct the survey at that moment by telephone. If
there were no answer, or if a message had previously left but our callers had not heard back after several days, a second call was made, then a third and fourth.

Ultimately, after almost two months data-gathering, 260 employers completed the very detailed and complex survey.

Near the end of the online survey questionnaire and during telephone contact, employers were asked if they would be willing to request that their employees participate in a separate survey of their employees. The getDowntown director also personally called to request participation of a number of the mid-size and large employers. The employee survey was also online and available by clicking a link in the email the employer sent. Employees who lacked email access were provided with a paper copy in English or in Spanish. A total of 279 employees from eleven employers responded either online or on paper. Most responses were via the web survey (85%), while the balance (15%) were on paper.

While in any survey such as this one hopes for greater cooperation, this was a reasonable level of participation in a period when survey resistance has grown to very high proportions. Is the survey random? No. Is it representative? We believe it is and we show comparisons to compare and contrast it with earlier surveys and with the Census of 2010. Data from both the survey or employers and that of employees were weighted in manner that we discuss in the separate chapters on the two surveys.

The objective of this report is to provide an understanding and overview of major findings of the 2011 surveys and by so doing, provide a new baseline set of measurements.
Part 1: Employer Survey
Figure 1: go!pass purchases of all organizations in the getDowntown database

 Although in its raw state, the sample was a reasonable cross-section of downtown organizations. In order to improve the representativeness of the sample when projected to the total getDowntown database data, the data were weighted according to the number of go!passes the organizations had purchased. Because there are no statistics describing organizational size in the database or any downtown employer census, the only surrogate we have to compare to the database for weighting is the number of go!passes purchased. The only alternative would have been to weight to the findings in 2009 regarding size of organization. That would have assumed that the 2009 distribution was more accurate than that of 2011. We have no evidence that that was true and there is clear evidence that the survey data exaggerated the percentage of employers who actually purchased go!passes. The latter would have had the advantage of controlling for differences in response between 2009 and 2011, making comparisons more straight-forward, but the disadvantage that the results would be less projectable to the total population of downtown businesses. For specific relationships, if getDowntown desires, a direct comparison can be made in supplementary tables by using an alternative weighting method linked to the 2009 parameters of responding organization size.
**Profile of responding employers**

The types of organizations responding in 2011 were similar, but not identical to those responding in 2009. In both years, the largest blocs of respondents were professional, managerial or technical organizations. In the smaller blocks the proportions have shifted. For the categories food or related services, health care and social services, and construction, engineering, utilities, and transport, 2009 provided a greater percentage of respondents. In 2011 personal care, fitness and services, government and education, and entertainment gained a greater percentage of respondents.

In a survey like this one in which the response is completely voluntary, requires the respondent to take the initiative, and is not incentivized, and that the 2011 data are weighted and those in 2009 were not weighted, this is remarkable similarity between the two years. Unfortunately, in terms of understanding the small differences that do exist, we cannot determine the degree to which the differing responses reflect a real difference in the makeup of the getDowntown database versus simply a differing tendency of the several types of employers to respond.
Organizational Positions of Respondents

The contacts that getDowntown had made with many of the organizations in Ann Arbor were in positions of substantial authority – either owners (53%) or managers (31%), while most others were in an administrative assistant role and presumably are thus in a position to know enough about the organization to respond to the survey questions accurately.
For the most part (79%), the owner of single employee organizations was the respondent. However, in organizations with two through twenty employees, only 43%, and in larger organizations, only 7% were owners. Instead, in the midsize organizations more people were either managers (38%) or administrative assistants (18%). Similarly in the largest organizations, a majority of the responses came from managers (53%) or administrative assistants (38%).

In terms of organizational type, it was primarily owners that responded in both those organizations that dealt with professional and other thinking oriented work (referred to here in shorthand as "mind-work") and those that deal with rote tasks or manual work. For the former category, 53% of respondents were owners, and in the latter category 52% were owners.
Figure 5 Size of employer and purchase of go!passes

<table>
<thead>
<tr>
<th>Number of go!passes purchased by responding organizations</th>
<th>One employee</th>
<th>Two through twenty employees</th>
<th>Twenty-one or more employees</th>
<th>All respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ten or more</td>
<td>1%</td>
<td>12%</td>
<td>69%</td>
<td>13%</td>
</tr>
<tr>
<td>One through nine</td>
<td>19%</td>
<td>32%</td>
<td>5%</td>
<td>25%</td>
</tr>
<tr>
<td>None</td>
<td>80%</td>
<td>56%</td>
<td>26%</td>
<td>63%</td>
</tr>
</tbody>
</table>

Size of employer and purchase of go!passes

For obvious reasons, the number of go!passes purchased varies substantially with the size of the organization making the purchase. For example, of those organizations with two through twenty employees, 32% purchased from one to nine go!passes. However, of those organizations with twenty-one employees or more, only 5% purchased one through nine go!passes, while 69% purchased 10 or more.

While this is entirely logical and unsurprising, it is an initial indication that a major market for expansion may be employers of between two and twenty employees, among whom more than half (56%) had purchased no go!passes at all.
Commuting Practices
**Figure 6 How do the responding employers themselves get to work?**

How do the responding employers themselves get to work most often in the past thirty days?

<table>
<thead>
<tr>
<th>Mode</th>
<th>Usual mode</th>
<th>Past thirty days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bicycle</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Walk</td>
<td>11%</td>
<td>15%</td>
</tr>
<tr>
<td>Take the AATA bus</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Drive or ride with others</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>Drive alone</td>
<td>67%</td>
<td>66%</td>
</tr>
</tbody>
</table>

How do the responding employers themselves get to work?

The usual mode that employers use to commute is to drive alone. Both in terms of their usual mode and the mode used in the past 30 days, approximately 2/3 of the employers get to work by single occupancy vehicle (SOV). However, this means that approximately 1/3 use alternative means to get to work. We do not have good current data on the commuting habits of the general population, but in 2000, according to the census, 65% of the general population drove to work alone (see Figure 38). Assuming that there has been little change in this regard, this suggests that the employers are very similar to the general population in this regard.

Of those who use alternative modes most either walk (11%), or take AATA (10%). Perhaps because the survey was conducted in the late summer more indicated (15%) that they had walked to work during the past 30 days and indicated that walking was their usual mode (11%).
Figure 7 Do those employers who purchase go!passes commute in different ways from others?

The relationship between purchasing go!passes and the personal commuting habits of the individual employers is complex. Those who have not purchased go!passes are the most likely (73%) to drive alone to work. Among those who have purchased go!passes, however, those who have purchased more go!passes are more likely, not less likely to drive alone to work. The reason is likely to be that the earnings of people employed by the larger employers are likely to be earning more money, and possibly to require more mobility during the day. However, these are speculative explanations.

What we do know, is that regardless of how many go!passes an organization purchases, the getDowntown contact person is more likely than others to use alternative modes. In other words, it appears that simply participating in the go!pass program as an employer is positively related to the tendency to use alternative modes of commuting.
Employer estimates of employee commuting modes

Employers were asked to estimate the percent of their employees who use each of four methods to commute to work. The chart above, which describes their responses, is not self-explanatory. Respondents were asked for each of the commuting modes whether between 1% and 5% of employees drove alone or whether it was between 6% and 20% who drove alone, or between 21% and 90% who drove alone, or for 91% or more who drove to work alone. This question was repeated for carpooling (“drive with others”), AATA, and walking or bicycling.

- When asked what percent of employees drive to work alone, 43% of employers estimate that 91% or more drive alone, and another 40% estimated that from 21% to 90% drive alone.
- When asked what percent of employees share rides with others, 43% of employers said that none of his or her employees commuted by driving with others, while 42% indicated that between 1% and 5% (23%) or 6% to 20% (19%) share a ride.
- When asked what percent of employees commute by AATA, 25% said that none did, but 23% put the figure at 1% to 5%, while 21% of employers said that 6% to 20% of their employees commute by AATA. Another 15% put the percentage at 21% to 40%, and a total of 13% indicated that more than 40% of their employees commute via AATA buses.
When asked what percent of employees walk or bicycle to work, 21% thought that none of their employees did so, but 21% put the figure at from 1% to 5%, while another 27% estimated it as 21% to 40%, and 17% estimated that more than 40% walk or bike to work.

**Figure 9 Does employee commuting (as estimated by employers) vary with type of business?**

![Estimated percentages of employees who usually use each mode to commute](chart.png)

**Does employee commuting (as estimated by employers) vary with type of business?**

Employers in organizations that can be characterized as based on professional or thinking skills in general (e.g., law firms, ad agencies, architects, etc.) versus those that require manual labor or following fixed procedures (e.g., cleaning companies, most jobs at restaurants)\(^1\) are more likely to estimate that a high percentage of their employees drive to work alone (48% to 32% estimate that 91% or more of their employees drive alone to work). Conversely, employers in those organizations that rely on manual labor or rote procedures are more likely than other types of employers to estimate that a higher percentage of their employees ride-share or walk or bicycle to work. They also place the percentage of employees who use AATA to commute at a slightly higher level (21% estimate that more than 20% of employees take AATA compared to 14% of employers in other types of organizations).

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\(^1\) Obviously these are judgment calls and are only approximate, impressionistic, and even debatable, not precise, categories. Moreover they are based on very limited information about the organizations. But they serve the purpose of rough comparison.
Perceived Importance of Transit Options
To attract workers and customers, how important is it to your organization to have transportation options?

Respondents were asked how important having transportation options is to attracting high-quality workers and for attracting customers. Thirty percent (30%) of respondents said it was very important for attracting quality workers, but 41% said it was very important for attracting customers. Many others (39% and 30% respectively) said it was somewhat important. Less than one fourth said it was not at all important.

In other words having transportation options appears important to a significant number of downtown employers both for the sake of workforce and for the sake of attracting customers or clients.
Figure 11 For attracting high quality workers, how important are transportation options?

For attracting high quality workers to your business or organization, how important is it for them to have a choice among a variety of transportation options including not only parking for cars, but also public buses, bike paths and other options as well?

<table>
<thead>
<tr>
<th></th>
<th>One employee</th>
<th>Two through twenty employees</th>
<th>Twenty-one or more employees</th>
<th>Professional and other mind-work</th>
<th>Rote or manual work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very important</td>
<td>30%</td>
<td>29%</td>
<td>30%</td>
<td>22%</td>
<td>36%</td>
</tr>
<tr>
<td>Somewhat important</td>
<td>41%</td>
<td>38%</td>
<td>44%</td>
<td>47%</td>
<td>34%</td>
</tr>
<tr>
<td>Not at all important</td>
<td>21%</td>
<td>23%</td>
<td>24%</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>8%</td>
<td>10%</td>
<td>2%</td>
<td>9%</td>
<td>8%</td>
</tr>
</tbody>
</table>

For attracting high quality workers, how important are transportation options?

Do the size and type of employer influence the sense that it is important to have transportation options for attracting quality employees? The sense that transportation options are important to attracting high-quality workers does not vary with the size of the employer. However, it does very with the type of employer. Those employers who use manual labor or employees engaged in rote types of activities are much more likely than others to say that it is very important.

The reason for this is probably that the wages of that type of work tend to be far lower than wages of professional and other “mind-work,” and therefore the transit dependency, or at least the need to economize, is probably much greater among those employees.
Figure 12 For attracting customers and clients, how important are transportation options?

For attracting customers and clients to your business or organization, how important is it for them to have a choice among a variety of transportation options including not only parking for cars, but also public buses, bike paths and other options as well.

<table>
<thead>
<tr>
<th>Category</th>
<th>One employee</th>
<th>Two through twenty employees</th>
<th>Twenty-one or more employees</th>
<th>Professional and other mind-work</th>
<th>Rote or manual work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very important</td>
<td>52%</td>
<td>35%</td>
<td>26%</td>
<td>30%</td>
<td>50%</td>
</tr>
<tr>
<td>Somewhat important</td>
<td>29%</td>
<td>27%</td>
<td>51%</td>
<td>32%</td>
<td>28%</td>
</tr>
<tr>
<td>Not at all important</td>
<td>17%</td>
<td>30%</td>
<td>21%</td>
<td>33%</td>
<td>17%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
<td>8%</td>
<td>2%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

For attracting customers and clients, how important are transportation options?

Unlike the finding regarding the relationship between size of employer and the sense that transportation options are important for attracting high-quality workers, size of employer is related to the sense that transportation options are important for attracting customers and clients. Thus, of the very small organizations with only a single employee, 52% indicate that it is very important, while of midsize firms of two through twenty employees, 35% say it is very important. However, of the largest organizations only 26% say it is very important.

As is the case for attracting high-quality employees, those organizations involved in rote or manual work are much more likely (50%) than those involved in professional activities (30%) to consider having transportation options very important to attracting customers or clients.

In short, there is a very substantial segment of the downtown business community, especially smaller businesses that consider having transportation options important to attracting their customer bases. Moreover, even among the largest businesses, more than one fourth (26%) indicate that having such options is very important to attracting clients or customers.
How does perceived importance of transportation options vary with the tendency or organizations to buy or not to buy go!passes?

The chart above (Figure 13) examines the relationship between the perception of the importance of having transportation options and the organizations' tendencies to purchase go!passes. The perception that having transportation options is very important for attracting high-quality workers is closely related to the tendency to buy go!passes. Of those who purchased go!passes, 43% indicated that having transportation options is very important to attracting high-quality employees. However, among those who did not purchase go!passes, only 22% consider having transportation options as very important to attracting high-quality employees.

On the other hand, there is no difference between those who bought or did not buy go!passes in terms of their sense that transportation options are important to attracting customers.

This finding is not really surprising because go!passes are oriented to full-time employment. Thus, although many businesses consider having transportation options to be very important to attracting customers, that is clearly not their motivation for purchasing go!passes. Their motivation for doing so is employment related.
How important do employers perceive commuting options and congestion control are for their organizations?

Employers were asked two further questions related to the relationship between transportation and their organizational success. First they were asked a general question about how important it is for the community to commit resources to providing transportation alternatives. Secondly, they were asked how deleterious it would be to their organization if congestion became 20% worse than it currently is on a typical day. They were asked these questions as ratings on a scale ranging from (1) not important at all to (7) very important.

There is widespread agreement that it is very important for the community commit resources to providing alternatives to driving alone for those who commute in the downtown area. While 43% consider this very important (i.e., seven on the seven point scale) another 19% rated it as six on that scale. Thus a total of 62% rate it very high in terms of importance. However, in terms of congestion being an organizational problem for them, a total of 43% indicate that an increase of 20% in the level of congestion would be an important problem for their business. Thus the perception that congestion would negatively impact their business, while widespread (43%) is much less than the level of support for investing in transportation alternatives (62%).

These are interesting findings when seen in juxtaposition. Far more employers consider community investment in transportation options to be very important than consider increased congestion to be a major problem for their own organization. Apparently, the sense of the importance of free-flowing commuter traffic to the community is of importance to these employers for reasons beyond their own self-interest.
Another aspect of the importance of any promotional program for alternative transit commuting involves the fundamental decision as to whether to remain located downtown or to move elsewhere. Of the responding organizations almost two thirds (63%) were located in downtown Ann Arbor for 10 years or more, while another 18% were located there for between three and nine years. Thus, a total of 81% had been located in the downtown area for a considerable length of time.
Since 2009, what decisions, if any, did organizations face regarding their downtown locations?

Those organizations that had been located in the downtown area for more than two years were asked whether, since 2009, they had faced a decision to move the organization. Of all organizations responding to the survey, 53% indicated that they had faced no choice about moving. However, a surprisingly high 47% indicated they had. The moving decisions involved three choices. Of all those responding to the survey, 19% said they had had to make a decision about whether to establish a new location in downtown Ann Arbor; 8% said they had had to make a decision about whether to move into downtown Ann Arbor from an existing location; 16% said they had had to make a decision about whether to move out of the downtown Ann Arbor area.

The largest organizations were the most geographically stable (69% had not faced a choice about moving), while the small and midsized organizations were quite likely to have faced such a choice. For the go!pass program and getDowntown, it is the organizations of two through 20 employees that would probably be of more concern than the single person organizations, and 19% of organizations of that size reported having had to make a decision whether to move out of the downtown area. Also, although most of the largest organizations did not face such a choice, 16% did. Given that they have far more employees than others, this poses a distinct challenge to business retention and retention of daytime population (and thus business customers) in the downtown.

Apparently, there is considerable mobility among these organizations. This implies that there is a considerable challenge to getDowntown organization in terms of continually updating business on its programs, and a continuing need to market alternative commuting methods to businesses that are relocating into the downtown area or considering relocation there or elsewhere.
Figure 17 How important do employers feel getDowntown and the go!pass are to their location decision?

| How much significance, if any, did the availability of the Go!pass and getDowntown programs have on your decision to locate or remain in downtown Ann Arbor? (Only those that faced a decision on moving from downtown) |
|---|---|---|---|
| | One employee | Two through twenty employees | Twenty-one or more employees | All respondents |
| Crucial – would not be located downtown without this program | 1% | 1% | 2% | 1% |
| Very significant factor | 2% | 7% | 4% | 5% |
| Significant factor | 6% | 7% | 23% | 8% |
| Not really a factor one way or the other | 81% | 70% | 54% | 73% |
| Not sure – was not involved in the decision | 9% | 15% | 17% | 13% |

How important do employers feel getDowntown and the go!pass are to their location decision?

Another measure of employer attitudes toward the importance of programs to encourage the use of transportation alternatives is their sense of how important the go!pass program is in their decision to be located downtown. The organizations that had faced the decision of whether to move or not were asked this question.

Among most downtown employers facing a location decision, the go!pass program is not considered to be a crucial factor in the location decision. Only 1% of all respondents indicated that it was crucial, and they would not be located downtown without this program. Another 5% indicated it was a very significant factor. Thus a total of 6% – not an insignificant proportion – consider the go!pass program to be quite important in their location decision. Another 8% consider it to be a "significant factor." On the other hand, 73% indicated that it was not really a factor one way or another. Apparently they have other reasons for wishing to be located downtown and for remaining there.
How important is the go!pass to employee recruitment and retention in a downtown location?

Although Figure 17 on the previous page indicated that most employers did not consider the go!pass program to be a crucial part of their reason to have a downtown location, Figure 18 above indicates that more than three fourths of the employers (79%) feel that the program is somewhat important, that is to say, it is a consideration for employees though not crucial.
Parking
Where do employers themselves park?

Parking is among the obvious challenges in terms of downtown commuting. Employers were asked where they themselves park when they drive to work. More than one fourth (28%) said that they park a public parking structure. Another 10% at public surface parking, 7% at metered street parking, and 10% at public surface parking. Thus a total of at least 55% choose to park at a paid facility of some type. Another 12% indicate that they use private parking, which may or may not involve payment by the commuter.

Twenty-eight percent (28%) indicate that they park at their workplace, which probably means that free parking is provided by the employer. Another 7% indicated they use free street parking.

### Figure 19 Where do employers themselves park? (Including only those who drive to work)

<table>
<thead>
<tr>
<th>Parking Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public parking structure</td>
<td>28%</td>
</tr>
<tr>
<td>Parking at workplace</td>
<td>28%</td>
</tr>
<tr>
<td>Private parking</td>
<td>12%</td>
</tr>
<tr>
<td>Public surface parking</td>
<td>10%</td>
</tr>
<tr>
<td>Street (metered)</td>
<td>7%</td>
</tr>
<tr>
<td>Street (free)</td>
<td>7%</td>
</tr>
<tr>
<td>Don’t drive to work</td>
<td>7%</td>
</tr>
</tbody>
</table>
**Figure 20 What employee parking benefits (if any) do employers provide?**

![Parking benefits chart](image)

**What employee parking benefits (if any) do employers provide?**

When employers provide parking benefits, they encourage driving to work. One fourth (25%) of employers said that they provide free on-site parking, while another 21% indicated that they pay the entire cost of parking for all employees. Thus 46% of employers provide a maximum subsidy for parking. Many other employers pay some portion of parking costs. For example 13% indicate they pay the entire cost of parking but only for some employees. Another 5% said that they pay a portion of the parking cost for all employees.

On the other hand, slightly more than one out of three (34%) indicated that they pay no parking benefit at all.
**Figure 21 How do parking benefits vary by whether or not an employer purchased gol!passes?**

Relationship between provision of parking subsidy and purchase/non-purchase of gol!passes

<table>
<thead>
<tr>
<th></th>
<th>Did not buy Gol!passes</th>
<th>Bought Gol!passes</th>
<th>All respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full parking subsidy</td>
<td>23%</td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Partial parking subsidy</td>
<td>47%</td>
<td>47%</td>
<td>47%</td>
</tr>
<tr>
<td>No parking subsidy</td>
<td>30%</td>
<td>44%</td>
<td>40%</td>
</tr>
</tbody>
</table>

**How do parking benefits vary by whether or not an employer purchased gol!passes?**

Employers clearly trade-off between the subsidy of parking and the purchase of gol!passes. The chart in Figure 21 demonstrates that those who purchase gol!passes are less likely to provide full parking subsidies (9%) than those who do not (23%). Similarly, while 44% of those who buy gol!passes provide no parking subsidy, only 30% of those who do not buy gol!passes to avoid the cost of parking subsidies.

Apparently purchase of gol!passes reduces the need (and associated expense) to subsidize parking. Assuming that the cost of the gol!pass is less than the cost of subsidizing parking (almost certainly true), then the subsidy of the gol!pass would represent a considerable cost saving to the 60% of employers who subsidize parking to some extent or fully.
Incentives to Use Alternate Modes and Information about Them
Figure 22 Incentives to use green commuting modes and how they vary by size and type of employer

Respondents were asked a series of questions about their organizations practices regarding the promotion of green commuting modes. In this section of the report we will deal with all of these. They consist of both tangible incentives such as a compressed work week, tax benefit for using transit (and so forth), as well as simply providing information on green transportation alternatives.

In Figure 22 above, we examine four basic forms of incentives into four groups: (1) all respondents; (2) by organizational size; (3) by organizational type; (4) whether or not the organization has purchased go!passes.

Among all respondents:
- Almost half of the organizations (47%) indicate they provide methods of adjusting the work week such as a compressed work week, flex time, or telecommuting.
- Only 10% of the organizations offer a commuter tax benefit program.
- Only 6% provide incentives to encourage their employees to live close to where they work.
- Only 6% provide rewards rather incentives to encourage employees to use green transportation.

Among employers of different sizes:
- Policies toward adjustment of hours by means of flex time or other mechanism do not vary greatly.
- Policies toward providing incentives to live close to the job and incentives to use green transportation in general do not vary substantially based on the size of the firm.
However, providing a tax benefit for the use of transit varies greatly by size of employer. The most numerous organizations in the database are single person firms. Only 4% of them offer themselves such a benefit. However, among the organizations with two through 20 employees the percentage is 11%, and among the largest employers studied, the percentages 37% who offer this benefit.

It is very interesting that among the largest of the organizations, 37% indicated they make the transit tax benefit available, but when asked whether they offer any incentives to use green transportation, only 9% said they do so. Apparently, they do not equate that tax benefit as being an incentive they offer employees. The reason may be that it is not an out of pocket expense for the employer, but one would assume that the employee would perceive it as a benefit and incentive.

Participation certainly seems quite low, though we have no national norms to which to compare it. But the low level suggests that perhaps employers do not realize that they too benefit financially because they save on the FICA match up to $100 per employee.

Among employers whose employees do different types of work:

- Employers whose employees engage in what we have called "mind-work" are much more likely to offer flex-time or other schedule adjustments to their employees (56%) than are those whose employees do rote or manual work (39%).
- On the other hand, those employers whose employees do rote or manual work are roughly twice as likely (although the absolute numbers are very small) to offer the commuter tax benefit or provide incentives to encourage employees to live close to where they work.

Those employers whose organizations provide go!passes:

- Do not differ from those who do not provide go!passes in terms of providing flexible scheduling.
- Those employers who purchased go!passes appear to be somewhat more likely to offer the commuter tax benefit program (13%) compared to those do not purchase go!passes (9%) but the difference is very small.
- Similarly those who purchased go!passes were approximately twice as likely (9%) as others (4%) to provide incentives to encourage employees to live close to the workplace, although the absolute numbers are very small.
- Again we see the paradox on the last line of the table in which only 13% of organizations that purchased go!passes for their employees said that they provide incentives to encourage the use of green transportation. Logically that percentage should be 100%. Apparently the employers are not equating the go!pass with being an incentive to encourage the use of green transportation. This would appear to be somewhat disadvantageous in terms of marketing if we can assume that employers would like to be associated with green practices. Employers may see the go!pass program more as an employee benefit intended to attract or retain employees, particularly in low paid jobs, and not so much as a green oriented effort.
Of all respondents, 28% indicated that they provide green commuting information and materials to newly hired employees. This tendency varies with the size of the employer. Of the largest organizations, 50% indicated that they provide such information to new employees, while 32% of the somewhat smaller (two through twenty employees) organizations. Of those with only one employee, the hiring process is presumably very informal, but 18% indicated that they do provide such information. As one would expect, those organizations that purchased go!passes were much more likely (47%) than others (16%) to indicate that they provided green commuting information to new employees. There is no relationship between the type of organization and the tendency to provide green commuting information.

Of all the organizations responding to the survey, 13% indicated that they include a section on green commuting and their employee information. The relationships between inclusion of a green commuting section in a human resource manual or other employee information follow the same pattern as the information discussed above. That is the larger the organization, the more likely it is to have formalized this type of information and the manual or other employee information. Similarly, if the organization has purchased go!passes, then it is roughly twice as likely (19%), compared to others (9%), to provide such formal information.
Employer Actions to Promote Green Commuting
What supports do employers provide for biking and walking as green alternatives?

Employers were asked what specific actions they took to encourage commuting by bicycle or walking. Of all respondents, 61% indicated that they took no such action, leaving 39% who had taken some type of action. In Figure 24 above, it is clear that many of the 39% who provided some type of support, provided more than one type (since the sum of the percentages exceeds 39%).

The most common practice is to provide bike racks or bike storage facilities (29%). While somewhat fewer, 15%, said they provide information to employees on the locations of bike racks and storage facilities. Some organizations provide lockers and/or shower facilities (9%) and walking or bicycling maps (7%). Finally, 2% indicated they organized walking or bicycling groups for employees for commuting purposes or during the lunch hour.
What supports do employers provide for using AATA as a green alternative?

Public transit is another form of green transportation. Of all respondents 41% indicated that they do provide some information to employees regarding the use of AATA as a green alternative. Again, many of the 41% obviously provide more than one type of information as is evident in Figure 25 above. The most common response was that they provide information on ATA bus services to their employees (36%), but 27% provided more specific information in the form of bus schedules, and 17% specific information on park-and-ride lot locations.
What supports, if any, do employers provide to encourage car-pooling?

What supports, if any, do employers provide to encourage carpooling? This is the lowest level of positive responses, with only 8% indicating that they took any action regarding carpools. Even the simple act of providing information on carpooling resources attracted only 5%. Also 5% indicated they had an internal carpool program were some way to help employees find coworkers with whom to carpool. Another small percentage, 3%, indicated they provide preferential parking for carpoolers or hybrid vehicles.

Clearly, it is encouragement for the use of AATA or bicycling or walking that are the dominant forms of green commuting that are promoted by employers. Carpooling is simply not on the radar of the vast majority of these employers.
Figure 27 Actions employers take to encourage green commuting and how they vary by company size, type, and whether they have purchased go!passes

Figure 27 combines the several types of incentives. As noted in the chart title, employers can take more than one action, and thus the total percentage may greatly exceed 100%. All actions described in the previous three figures were given equal weight. To give an example of those employers with twenty-one or more employees, 71% said that they encouraged use of AATA by one or more of the mechanisms described earlier, 72% said they encourage walking and biking, and 11% said they encourage carpooling in the same sense.

The purpose of combining items in this way is simply to be able to compare among different size and types of employers in a single, fairly simple, chart. What we find is that the larger the employer organization, the more likely it is to provide some type of incentive for one of these green alternatives. For example: while 50% of those with between two and twenty employees said that they encourage use of AATA, 71% of those with twenty-one or more employees said they encourage use of AATA through one of the specific actions described in previous charts. A similar relationship holds in terms of walking/biking and carpooling.

Those organizations engaged in rote or manual work are somewhat more likely than other organizations to encourage green commuting. This is likely related to be related to the fact that their employees are more likely to be low wage workers in real need of inexpensive transportation, rather than to any augmented green motivation over other types of organizations.
Those organizations that had purchased go!passes according to the getDowntown database had also much higher rates of saying they encourage each type of green commuting than did other organizations. For example, while 21% of those who did not purchased go!passes indicated that they encouraged use of AATA, 74% of those who purchased go!passes indicated that they encourage the use of AATA. (The fact that the percent is 74% rather than 100% is once again paradoxical, since it would seem that providing go!passes amounts to encouraging use of AATA, but the difference of magnitude illustrates the point.) More interesting is that if the organization purchased go!passes, they were also more likely to say they encourage walking or biking to work (50% compared to 32% for others). Apparently, involvement with the go!pass program reinforces the tendency to encourage other types of green commuting.
In the chart above,
Figure 28, we take all of the employer behaviors that support green commuting – everything from the purchase of go!passes to providing bike lockers (but not including simply providing information) and divide them into low, moderate and high support for green commuting, then combine them with the employer policies on subsidy for parking.

When we consider the distribution of these combinations, we find that there are relatively few employers who are green or anti-green purists. A green purist would, for example, pay no parking costs and would score high on the indicator of green incentives. Only 9% fit that description. Conversely, only 9% also fit the opposite description – full parking subsidy and little or no green incentive. Other than those two groups, the least ambivalent is the group of 19% of employers who provide no parking subsidy and much green incentive.

Many more employers are in the paradoxical situation of supporting both employees who drive to work and those who use greener commuting methods. For example, at the base of the pyramid are 24% of employers who provide both partial parking subsidy and some green incentive. Another 14% provide partial parking subsidy and much green incentive.

As one would expect, most employers find it in their interest to service the employees’ needs first and environmental causes second. Commuting practices are too important to employee attraction and retention for many employers to be environmental (or anti-environmental) purists. Consequently, it is that middle range that getDowntown should be marketing – moderation in promoting parking, coupled with as much green incentive as possible.
Perceptions of getDowntown
Respondents were asked whether, prior to the survey, they had been aware of various getDowntown programs. In spite of the fact that the data are weighted to the size of the total database (thus augmenting the effect of those not often in contact with getDowntown) more than half of the respondents indicated awareness of all but two of the seven getDowntown programs they were asked about – a fact that suggests that getDowntown is doing a good job of making its programs known.

Awareness of the general role of getDowntown in providing green commuting information has the strongest level of awareness (76%), but more specific programmatic roles such as provision of bicycle lockers for rent and running the commuter challenge also have high awareness (63% and 61%, respectively). The two items on which awareness is much lower than the others are provision of information on telecommuting and preferential parking for certain carpools. That difference in awareness is not surprising since most of the responding employers would probably have little reason to be vitally interested in either program.

Overall, it appears that any lack of participation in getDowntown’s green commuting efforts is not due to a lack of awareness of the programs. This is both good news and presents a challenge. The good news is that this means that getDowntown is doing a good job of making its programs known. It presents a challenge because the easy part has been done -- raising awareness is a cognitive function much easier to accomplish than the changing of attitudes and behaviors, which are the challenges now.
**Figure 30 Perceived utility of getDowntown programs**

How useful, if useful at all, do you feel each of the following is or would be for your business/organization?

While awareness of getDowntown programs is high, the sense that they are very useful is more limited. Respondents were asked to rate the usefulness of getDowntown programs using a scale of one to seven on which seven was the highest score for usefulness. To simplify the chart, the scores were compressed into three groups as shown in the legend in Figure 30.

The program with the highest perceived usefulness is also the most tangible – the go!pass program, with 50% scoring it six or seven on the scale. Three other aspects of getDowntown programming are considered very useful by about one-fourth of the organizations' representatives – advocacy, information, and the website.

The other getDowntown programs are programs that apply primarily to those who utilize the service or participate in the activity. Thus the percentage who would consider them very useful is bound to be lower than the generally applicable programs. Specifically, this includes assistance with the commuting benefit (16%), the Commuter Challenge (16%), and providing workshops and presentations (8%) and the getDowntown blog (8%).

The perceived usefulness is not a measure of actual usefulness, of course. For instance, the Commuter Challenge is a great source of publicity, and probably contributes significantly to the high overall awareness scores for getDowntown programs, although it is comparatively low on the "perceived usefulness" measure.
On a scale of one to seven, how beneficial do employers believe getDowntown programs are for their employees specifically and their organizations in general?

Another way to measure perceived benefit is to ask how useful getDowntown programs are to the respondents' organizations and their employees. This is really the acid test of utility since it directly impacts business organizational success. Substantial numbers of employers rate the getDowntown programs as six or seven on the seven point scale. For employees the total is 33%, and for the organization itself, 27%. Another 10% and 13% respectively give the programs a rating of five, which is a fairly neutral, but leaning positive rating.

These are unique services, and we have no benchmarks from other cities to which to compare them. But common observation would suggest that the efforts of getDowntown, which are narrowly focused on commuting issues, and on green-commuting within that realm, could not be expected to score much higher than they did, with one fourth to one third of the employers rating them as being very useful to their employees and/or to their organizations.
Figure 32 How do perceived benefits of getDowntown programs for employees and organizations vary between those organizations that buy or do not buy go!passes?

How much of a benefit do you think getDowntown’s programs and service are for...

<table>
<thead>
<tr>
<th></th>
<th>Did not buy Go!passes</th>
<th>Bought Go!passes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Employees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Benefit</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Great Benefit</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>Your Organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Benefit</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>Great Benefit</td>
<td>19%</td>
<td>13%</td>
</tr>
</tbody>
</table>

How do perceived benefits of getDowntown programs for employees and organizations vary between those organizations that buy or do not buy go!passes?

In Figure 32 we consider the relationship between perceived usefulness and the history of having purchased go!passes. As one would anticipate, those who had purchased go!passes had a much stronger tendency to rate the services of getDowntown as very useful to employees (a total of 57% in the six and seven score categories) and to the organization itself (47% in the six and seven score categories). Conversely, it was the non-purchasers of go!passes who tended to rate the services as low in usefulness.
Figure 33 Open end comments on getDowntown

Employer Comments on Perceived Benefits of getDowntown

- Ability to avoid cost of parking through use of the goPAS$:
- Allows employees to save money on their daily work commute.
- Although most employees do not participate – because of the nature of our work schedules and the large number of people that do not live in Ann Arbor, it is good to have these services available.
- Being able to offer members a bus pass as part of their continued monthly membership is major selling point that brings ~100 small business owners downtown on a almost daily basis
- Mine is a biz of one person. Love my bike locker
- GoPAS$ (many mentions)
- GoPAS$ are highly valued by our employees
- Bus services are very helpful for a couple of our employees that live in town but not downtown.
- By being more green friendly, and offering commuting options.
- Employees benefit great since there is no parking subsidy provided by organization
- Employees like the discounts and bus options
- Enables green commuting
- getDowntown provides alternatives to the traditional commuting practice of each employee driving a car to work, parking it for the day, and driving it home 8 hours later.
- It has given us more choices
- Go! Pass helps our employees get to work. The Commuter challenge is a great morale building activity.
- GoPAS$ is the only benefit we offer
- Having the GoPAS$ for taking the bus to work, especially during Art Fair, is a wonderful benefit. It’s free to the employees and a very reasonably priced perquisite for the employer to provide.
- Helps improve employee attendance and reduces turnover.
- Helps keep our cars out of the downtown so it keep parking freed up for our clients.
- In the past, some employees benefited from the GoPAS$ program. However, recent changes in that program made it less useful since we had to pay for EVERY employee in order to get passes for the one or two who wanted one.
- It helps us attract employees regardless of personal transportation
- It’s good for my employees to have access to the type of information provided by getDowntown. The GoPAS$ is a great tool for my full time employees.
- Many of my employees do not own cars, so the GoPAS$ is a huge help. I only wish that the AATA ran buses later than 11PM, as we are open to 12AM or later each night.
- Most employees who work for us are males between the ages of 16 and 22. Only a few of them even have drivers’ licenses. They use goPAS$ to get to work regularly. Some of our employees live in Ypsilanti and they really need no way of getting to work with out the get downtown program.
- One of the only benefits we can offer.
- Our employee’s cherish their goPAS$.

Open end comments on getDowntown

The notable thing about the open end comments offered by employers is that only a few of them focus on the green aspects of the getDowntown programs. Most of the comments relate to the goPAS$ and the effect on employees being able to commute efficiently or at all, or to the fact that it enables them to offer a benefit. In other words to these employers green commuting may or may not be worth pursuing, but what makes getDowntown work for them is the business benefit.
How have organizations used getDowntown services?

The ways in which the downtown employers have used getDowntown is as one would expect. (Respondents could cite more than one way they interacted with getDowntown.)

The most common way of using getDowntown service is providing go!passes for employees (44%). This is, of course, the key. Beyond that, 25% found commuting information on the website. While we do not know what kind of commuting information they found, to have one fourth of the downtown employers citing the getDowntown website as a source of commuting information of any kind is impressive. In addition to checking the website themselves, 10% referred an employee to the site and 16% had forwarded the getDowntown newsletter to employees. Some of these or other respondents indicated that they had asked a commuting question (11%) or checked the blog (4%).

While there are no industry norms for the frequency of using of such services, these percentages make it clear that getDowntown has penetrated the market for commuting information in a significant way.
**Figure 35 Have responding employers personally been in contact with getDowntown or used its services?**

GetDowntown provides information on commuting. In the past twelve months, which, if any, of the following have *you* done?

- 22% Used the getDowntown website (www.getdowntown.org) to find commuting information
- 11% Contacted the getDowntown Program by email, mail or phone regarding a commuting question
- 6% Visited the getDowntown Facebook Page or Twitter Feed
- 4% Checked the getDowntown blog (blog.getdowntown.org) for commuting information
- 1% Obtained information from the getDowntown Program about bike lockers
- 0% Obtained information from the getDowntown Program about carpooling
- 60% I have not done any of these in the past twelve months

*Have responding employers personally been in contact with getDowntown or used its services?*

We have seen the business-perspective of the employers regarding getDowntown. But have they personally used any of its services or at least been in contact? While many (60%) have not done so, 40% have. More (22%) have used the website to find commuting information than have used any other service. Eleven percent (11%) has made direct contact to ask a commuting question. Some have either checked the Facebook page (6%) or Twitter feed (4%). And 1% had contacted getDowntown about bicycle lockers.
What getDowntown services have responding employers used in the past 12 months?

Employers responding to the survey were asked which of the getDowntown services they personally had used. While 45% had used none of them, 36% purchased go!passes for their employees, and 20% had purchased a go!pass for themselves.
Employers were asked what would encourage their organizations to incorporate information and programs on green commuting in the workplace. Their answers are extremely interesting because they emphasize business benefit as opposed to environmental benefit. They also emphasize tangible business benefit as opposed to business benefit per se.

For example, the incentive with the highest percentage (34%) saying it was a very important incentive is savings on parking costs. Highest was the ability to offer a no or low cost benefit (21%), the third tax saving to their organization (19%). The fourth, and next to lowest among the five offered was information on the environmental benefit.

Several things should be said about these options. First savings on parking costs affect only those who subsidize parking and that may not have occurred to the respondents. Also the idea of savings on parking costs is highly tangible in contrast to the other four options, and this may account for some of its popularity. However, the larger point is that the top three items are all cost related and not related to environmental concerns. This fact is very suggestive in terms of future marketing efforts for getDowntown.
Part 2: The Employee Survey
Introduction to Part 2

Employers who were completing the survey of organizations were asked to volunteer to have their employees participate in an employee version of the survey. Several organizations were also contacted directly by getDowntown leaders and asked to participate. Ultimately the 11 firms listed below participated.

• The employers included:
  – Ann Arbor District Library
  – AnnArbor.Com
  – ApplEcon LLC
  – Bank of Ann Arbor
  – Conor O’Neills
  – Digital Ops
  – First United Methodist Church Ann Arbor
  – NovoDynamics, Inc.
  – People's Food Coop
  – Seva Restaurant
  – Zingerman's Deli

Participation consisted of two types. First those employees with e-mail addresses were sent an e-mail by their employer asking them to participate. The e-mail carried a link to an online survey. Employers were asked to estimate the number of people in their employ who lacked an e-mail address, and an estimate of those who spoke only Spanish. The latter two groups were provided with a paper version of the survey which as closely as possible duplicated the online survey.

A total of 279 employees from eleven employers responded either online or on paper. Most responses were via the web survey (85%), while the balance (15%) was on paper.
A demographic profile appears in the table above. It compares the age profile of employees completing the survey in 2009 in comparison to those in the current 2011 survey. It also contains a comparison to census data from 2010 which shows the age distribution in Ann Arbor of the employed population. The one exception to this is that mode to work was not available from the 2000 census at the time this report was prepared and therefore we had to rely on data from 10 years earlier in 2000.

Weighting

It is inherently difficult, and somewhat treacherous to try to compare results of surveys which depend upon organizations volunteering to participate, especially when different data collection methods were used, and different recruiting methods were used. These are not scientific random samples which contain a new level of sampling error. However, knowing that there will be a desire to compare some of the results, we have tried to use statistical weighting to come as close as possible to having comparable data.

The table makes it clear that the distributions of age were similar between 2009 and 2011 in their raw, unweighted state. They were each somewhat similar to the census data from 2010 in terms of age distribution.
However, in both 2009 and 2011 there were much higher percentages in the age range 56 and older than they were in the census of 2010.

One column is labeled "2011 weighted to equivalent income of 2009 survey." This means that statistical weights were used in analysis of the 2011 data to make the income distribution more closely match that of 2009. For technical reasons a perfect match was not attainable, but the match is very close. Why was this done?

The unweighted data from 2011 found many more people in the lowest income category. We do not know how to explain this because we do not know precisely how employees were recruited in 2009. However, we suspect that more of the heavy users of the go!pass program found it in their interest to participate in 2011. Since their interest is heavily dependent on their assessment of the impact of the program on their employees, especially their employees of lower income, this may have caused much of that apparent change. It is clear in any event, that the lower income group was greater in the 2011 survey compared to both the census and the 2009 survey.

To make the data reasonably comparable between the two years and more comparable to the census it was essential to match the income levels of the two samples. To make the data most useful, it was matched to the 2009 survey income distribution which had the side effect of making it closer to the income distribution of the census as well as the 2009 survey data.

This procedure changes some (by no means all) of the raw, unweighted results from 2011, it makes it possible for anyone interested in comparing the two year's results to understand that the income variable has been held constant. This means that if the data had not been weighted, we would not know whether any differences observed were a result of the income differences between the samples as opposed to real changes resulting from such things as getDowntown efforts or increased environmental awareness. In effect, weighting the data removes this distorting effect of the difference in the income between the two surveys.

The other major difference between the samples, which prevails even after the data are weighted, is a gender difference. While the census shows that 50% of Ann Arbor employees are males and 50% females, in 2009 survey respondents were 42% male and 58% female, and in 2011 the gender bias toward females was even more pronounced with only 33% male, and 67% female. Weighting by income changed this in only trivial ways. Thus some of the differences between the two surveys will be affected in small degree by this gender difference.

Notice that one of the important variables for this study, the mode used to commute to work, is very similar between 2009 and 2011 once the data are weighted. In 2009, 61% drove to work alone and in 2011 57% did so. There may have been a small change in the use of public transit, but this may be better explained by increased numbers of go!pass users in the 2011 data. In any event the difference is too small to be of any importance. There also may have been some shift, though it is very slight if it occurred, between ridesharing, which was 6% in 2009 and only 3% in 2011, and bicycling which was only 2% in 2009 at 6% in 2011. Given the fact that the change was by a factor of two or more in each case, we suspect that this change is real and not an artifact of the sampling.
Employment Parameters: Duration of Employment, Full-time/Part time, and Student Status
For how long have respondents worked for their current employers? And how does that duration vary between full and part-time employment?

In Figure 39 we see that more than one fifth of the respondents (21%) had been working for their current employer for less than one year. Short-term employment was particularly true for part-time workers (45%) compared to full-time workers (13%). Another 25% had worked for the same employer for from one to just under three years. This characteristic did not differ significantly between full and part-time workers. Another 15% had worked for the same employer between three and five years, and this did differ substantially between full and part-time, with 19% of full-time workers falling in that category compared to only 4% of part-time workers. Finally 38% of all respondents said they had been working for the same employer for more than five years, and this difference greatly between full-time (44%) and part-time (24%) workers.
For how long have respondents worked downtown, and how does that tenure relate to duration of the current job?

Respondents were also asked how long they had worked downtown. Almost half, 47%, indicated that they had worked downtown for more than five years. Since only 38% said they had worked for the same employer for more than five years (All respondents, Figure 41), obviously 11% had changed employers during that time.

It is interesting that almost half of the workforce in the downtown area apparently is very stable over time. If we also include as "stable over time" those who have worked downtown between three and five years (17%) the total of...
what we may consider long-term employees in the downtown area is 64%, almost two thirds of all downtown employees.

These long term workers in downtown have had a long period to develop and become accustomed to their travel modes, and we can probably assume it would be difficult to change their commuting habits for intangible reasons such as suddenly increased environmental concern.

We know from many studies of transit users that use of transit tends, in the United States (with the exception of a few large cities with extensive rail systems) to occur as a life stage. Transit tends to be used when a person is young and without much income and to diminish as income rises with age. Mobility beyond a localized area in this society depends heavily on access to a vehicle, and thus as income increases, the tendency is to seek to afford a vehicle and to cease using transit. Thus the longer a population of workers remains in place with rising earnings, the greater the odds that they will migrate from using transit to no longer using transit.

On the other hand there is a continual new crop of shorter term employees who constitute a total of 37% of the downtown workforce. Duration in the current job is, for obvious reasons, related to the years an employee has worked in the downtown area. The degree to which the two do not coincide is an indicator of the degree to which there is a change of position and thus an opening for getDowntown to have an influence on the new employees' commuting practices. It is this type of juncture in which things change in a person's life as he or she tries to adjust to new circumstances, and it is there that the greatest impact is likely to be possible for getDowntown.

For promotional purposes this might mean making special rates or special arrangements of some type for those who are new to working downtown or who are changing jobs within the downtown.
In college towns such as Ann Arbor, it is inevitable that some of the workforce will consist of college students. Among the employees responding to the survey, 10% said they were full-time students, and another 7% part-time students. Thus the workforce is primarily (83%) non-students but a significant number (17%) are students.

For obvious reasons, the length of time an employee has worked in downtown Ann Arbor is related to student status. For example, of those who have worked in downtown Ann Arbor for more than five years, only 3% of full-time students, and 3% part-time. However of those who work in downtown Ann Arbor for less than one year, 32% of full-time students, and another 9% part-time students.
Mode to Work, by Student Status

The percentages in Figure 44 represent percentages of all downtown employees broken down two ways, by student status and mode to work. Virtually half (49.8%) are not students and they commute by driving alone. Another 9.9% are not students and they walk to work, while 8.8 are not students and they take AATA to work.

To put the data in further perspective, Figure 45 displays the modal tendencies of students and non-students in a different manner. It shows the percent of full time students who get to work by each mode rather than (as in the chart of Figure 44 above) showing them as a percent of all employees responding to the survey. Although the percentages are weighted (see "Weighting," page 65) the table also shows the unweighted sub-sample sizes on which the percentages are based. It shows this in order to caution the reader that the subsample is too small to be truly definitive. It is, however
suggestive, and it suggests that students who are also employed are much more likely than others to either walk all the way to work or to take a bus all the way to work. However, while common observation of student living locations relative to downtown and knowledge of how the bus fares operate suggests that this is likely true of student workers in Ann Arbor in general, Figure 44 puts the numbers of students in the total workforce in perspective. In short, while students provide a significant number of workers to the downtown workforce, and they probably tend to be better users than non-students of non-SOV modes for commuting, their numbers are small in the total workforce.
Work Schedule
On which days of the week do employees work?

Employees were asked on which days of the week they work. Seventy-nine percent (79%) or more work on each work day. There is some variation, with more people working Thursday and Friday (87% and 86% respectively) than on Monday Tuesday and Wednesday (83%, 82%, 79% respectively). For obvious reasons, fewer people report being employed on Saturday and Sunday (38% and 30% respectively) than on weekdays.
How many days a week do employees work, and how does that pattern vary between full and part-time employment?

By tallying the days of the week that employees report working, we learn that 14% work seven days a week, another 10% six days a week, and the balance, 84%, work from one to five days a week. The largest single number, as one might expect, is for those who work five days a week (53%).

The percentages vary greatly depending upon whether a person works full or part time. Within two thirds of the full-time workers work five days a week (69%) while in additional 28% work six or seven days a week. A small number (3%) apparently were compressed week because they report working full-time although they work four days a week. Part-time workers on the other hand run the gamut of days worked, with the most common patterns being four days or five days (26% and 21% respectively).
Employees were asked what time their workday begins. There is a wide range of beginning times. However, the largest single group begins at 8 AM with additional workers coming on at 8:30 AM (8%) and 9 AM (17%). By 9 AM the cumulative percent of workers who have arrived at work is 69% of all downtown employees. The balance, 31%, arrives at work at various times during the day except for 6% who have no fixed schedule.
**Work schedule – End Time of Workday**

While the end of the workday varies considerably among the employees, more (25%) end the day at 5 PM than any other time. There's another much lesser peak at 6 PM and another at 9 PM.
Start and end times of work day

In the chart above we see a summary of the previous two charts showing both start and end time in one graph and showing that the peak start time is 8 AM the peak time is 5 PM. But in each case only about one fourth of the workers peak at those times with others having scattered beginning or end times throughout the workday.

While a plurality of workers appear to have regular schedules, a substantial number do not. Those who must arrive at or leave work at unusual hours, during off-peak periods or very late at night are unlikely to be able to use AATA service efficiently. This, in itself, limits potential and encouraging green commuting.
Awareness of getDowntown
Figure 51 Awareness of getDowntown

![Bar chart showing awareness percentages for various questions.]

**Awareness of getDowntown**

Respondents were asked whether prior to its introduction in the survey they had been aware of the getDowntown program. Seventy-three percent (73%) said they had been aware of getDowntown.

Respondents were also asked about more specific elements is up to detDowntown program:

- Had they heard of The Commuter Challenge? 70% had and 30% had not.
- Had they participated in the commuter challenge in 2011? 39% had and 61% had not. This seems like a very high participatory figure for any type of similar activity.
- Are they aware of the go!pass program? 90% said they were aware of it.

It is fairly clear that whatever marketing challenges the getDowntown program faces, simple awareness of the organization and two of its primary, visible activities have been achieved.
Respondents were also asked additional questions about detDowntown and its specific activities. For example, when they were aware prior to the survey that bicycle lockers were available for individuals who are commuting to work in downtown Ann Arbor for a cost of $60 a year? Were they aware of the Zipcar program? And so forth.

Awareness was as follows:

- 53% were aware of the bicycle locker rental program.
- 69% were aware of the Zipcar program.
- 42% were aware of the night ride taxi service program which is discounted for holders of a go!pass.
- 40% were aware of the A2 Express running between Chelsea and downtown Ann Arbor and between Canton and downtown Ann Arbor.

To repeat a point made earlier, awareness of all of these programs is quite high. This is not to say it couldn’t be higher, but awareness is certainly quite adequate and higher than one might have anticipated.

The fact that fewer than 50% were aware of the night ride taxi program and the A2 Express probably reflects the fact that these are services used by only a relatively small portion of downtown employees, and they are much less visible than bicycle lockers or the fleet of Zipcars operating in Ann Arbor.
Among all respondents, approximately two thirds (67%) are full-time employees.

Given that the go!pass is provided to full-time employees one would expect that part-time employees would be less likely to be aware of the program, and this is in fact the case. Of those aware of the getDowntown program, 76% of full-time employees. But of those unaware of the program, a majority (59%) are part-time employees.
Figure 54 Awareness of getDowntown and how it varies with time spent working downtown and working in present job

Awareness of getDowntown and how it varies with time spent working downtown and working in present job

Awareness of the getDowntown program varies with the number of years an employee has worked in the current job or in the downtown area. Oddly, the maximum awareness occurs at those working in present job or working downtown from 3 to 5 years (92%) rather than longer than that. However, it is clear that exposure to the downtown work environment is associated with increased awareness of getDowntown.

Since we know that the best time to effect change in behavior is likely to be while people are trying to adjust to new circumstances, the results here imply that perhaps there is an opportunity to make newer downtown employees more aware of getDowntown programs earlier in their downtown work experience.
How is employee age related to awareness of getDowntown?

Just as duration in the downtown job is related to awareness of getDowntown, so is age; The younger the employee, the less aware they are. That may have to do with the general lack of civic awareness among the young, or with their lack of tenure in the job. Either way, given that younger persons are likely to have lower incomes, they could probably benefit more from both go!passes and bike lockers.
How Employees Commute
Of all downtown employees, most drive alone all the way to work (57%). The second most common mode of commuting is to walk all the way to work (14%). Commuting by bus, and only by bus, is third with 11%. However if we combine those who bicycle to the bus (2%) and those who drive to a park and ride and then take the bus (4%), we find it a total of 17% take the bus. Another 6% bicycle all the way to work, and 3% carpool. Finally, 2% use some other complex mix of transportation modes.
Available vehicles

The overwhelming majority, 93%, of downtown employees has a driver's license, and 84% also have a vehicle they could use to commute to work. Of those who have a vehicle available, one third (33%) have one vehicle, but the balance has more than one.
For obvious reasons, the mode of commuting depends heavily upon whether a person has a vehicle available. Of those with a vehicle available, more than two thirds (68%) drive alone all the way to work. On the other hand, of those with no vehicle available, 38% take a bus all the way to work. Oddly, 2% of those who said they had no vehicle available said they drove and then took the bus. We assume they meant that they get a ride to a stop and then take the bus. Additionally another 8% bicycle and then take the bus, for a grand total of 48% of those without a vehicle taking the bus to work.

Keeping in mind that only 16% said they lack a vehicle, this amounts to just under 8% of the downtown workforce. This relationship is shown visually in Figure 59 on the following page.
To keep these percentages in perspective, the chart above presents each group as a percentage of the total downtown employee population that responded to the survey. (The percentages are rounded off. Those with the decimal of less than .5 round to zero.) This chart enables us put the percentages in visual perspective.

We can see here that of all downtown commuters, 57% have vehicle and drive alone all the way to work, 6% have a vehicle but take the bus all the way, and so forth. We also see that 6% have no vehicle and take a bus all the way to work, while 2% of all commuters have no vehicle and bicycle all the way to work, and so forth.

### Figure 59 Vehicles and commuting mode – an alternate view

<table>
<thead>
<tr>
<th>Mode of Commuting</th>
<th>Has vehicle available (84%)</th>
<th>Has no vehicle available (16%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use another mix</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Bike and take the bus</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Drive and take the bus</td>
<td>4%</td>
<td>0%</td>
</tr>
<tr>
<td>Walk all the way</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Carpool</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Bicycle all the way</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Take a bus all the way</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Drive alone all the way</td>
<td>57%</td>
<td>0%</td>
</tr>
</tbody>
</table>
**Figure 60 Reasons for which employees say they drive alone**

### Reason to drive alone

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>54%</td>
</tr>
<tr>
<td>Lack of alternative commuting options</td>
<td>47%</td>
</tr>
<tr>
<td>Time</td>
<td>34%</td>
</tr>
<tr>
<td>Need car for work trips during the day</td>
<td>30%</td>
</tr>
<tr>
<td>Need car: personal trips</td>
<td>30%</td>
</tr>
<tr>
<td>Comfort</td>
<td>25%</td>
</tr>
<tr>
<td>Drop off / pick up child(ren) at school / child care</td>
<td>16%</td>
</tr>
<tr>
<td>I just prefer it</td>
<td>13%</td>
</tr>
<tr>
<td>Drop off / pick up spouse/significant other</td>
<td>2%</td>
</tr>
<tr>
<td>Physical disability or health problem</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>16%</td>
</tr>
</tbody>
</table>

**Reasons for which employees say they drive alone**

Most users have vehicle and drive alone to work. Why do they say they choose that mode? The most common reason is simple convenience (54). However, 47% say they lack commuting options. This is interesting because only 16% indicated they have no vehicle available. Thus a lack of commuting options must relate to other considerations. For example, many employees (see inset list on the left) say that they live too far away to make any other mode feasible, that they need the car while at work, that the hours of bus service do not match their commuting needs, or other reasons.
Figure 61 How far does the typical employee commute?

How far does the typical employee commute?

For obvious reasons, distance makes a great deal of difference in terms of how people commute. A substantial number of employees live fairly close to work:

- 1% live within less than a half-mile
- 17% live from a half-mile to less than 2 miles
- Another 21% live from 2 to 4 miles

All of these distances are if not easily routinely walkable, at least they all can be traversed by bicycle.

A great many employees, totaling 61%, live 4 miles or more from work, making walking or bicycling for the most part impractical. However, a very substantial portion of the workforce (64%) lives within a half-mile to 10 miles of work, and could likely find it quite feasible to commute by bus if schedule permitted, and there was no need for using the car during the workday.
How Does Mode to Work Vary with Distance to Work?

The mode to work varies greatly with the distance from home to work. While this is obvious, Figure 62 displays the information both statistically and visually to make it tangible.

- Most of those, 75%, live within a half-mile of work walk to work. This tendency diminishes with distance. Beyond 4 miles no one walks to work.
- Bicycling peaks between a half-mile in less than 2 miles and diminishes completely beyond 10 miles.
- Driving alone all the way to work rises in a linear manner with distance. That is farther away one moves from work, the more likely he or she is to drive alone to work all the way.
- Bus riding peaks at between 2 and 4 miles, with 33% of people living at that distance saying they take a bus all the way to work. Beyond that point bus riding diminishes severely, with only 12% of those living from four to less than 10 miles away saying they take bus on the way to work.
- Those who drive and take the bus are most common and a distance and 10 and 15 miles (14%) although a few live more than 15 miles away from work (4%) or somewhat closer (a total of 7%).

It appears that from the consumer’s point of view the bus is most competitive with a single occupancy vehicle (SOV) at a distance between 2 and 4 miles, and bicycling is most competitive at a distance up to 2 miles. Bus competitiveness picks up again at the range of 10 to 15 miles by virtue of park and ride lots. This competition at that distance causes some otherwise linear tendency of driving alone to rise with distance to flatten out. From 4 miles to less than 10 miles 74% drive alone all the way to work and from 10 to 15 miles the increase is only 2% to 76% because a substantial number of people (14%) choose to drive and take the bus.
Figure 63 Where do employees park?

All who drive to work

- 27% park in a free street space
- 24% park in a paid surface parking lot
- 21% park in a paid parking structure
- 20% park in their employer's parking lot
- 7% park in other type of parking space
- 2% park in a parking meter

When you drive to work, do you most often park in a paid parking garage, a paid street-level parking lot, your employer's parking lot, a parking meter, a free street space, or other type of parking space?

50% find one immediately
13% find one in 1 to 2 minutes of looking
19% find one in 3 to 5 minutes of looking
13% find one in 6 to 10 minutes of looking
5% find one in 11 minutes or longer

On a typical work day, how long does it take to find a parking spot after you arrive near work?

Where do employees park?

Of all employees who drive to work more than one fourth (27%) find free street parking. Another 20% use their employer's parking lot where we can presume they park free. However, 24% indicate they used paid surface parking lot, and another 21% use a paid parking structure.

Scarcity of parking is apparently not a great problem for employees because 50% indicate they find a place immediately, and another 13% indicate that they find one with only one or two minutes of looking. Another 19% following a marginal range of 3 to 5 minutes of looking for space which they may consider inconvenient, but a total of 18% spend 6 minutes or more looking for parking place – a duration which probably is considered inconvenient.
How many employees commute to work by bicycle?

There is a small, but important sub-set of respondents who commute regularly (6%) or occasionally by bicycle (16%). As we saw earlier (Figure 63) this tendency is closely related to the distance of the commute.
Figure 65 What would encourage more bicycle commuting?

What would make it more realistic for you to bike to or from work more often?
(Asked of those whose primary mode is other than bicycling to work. n=259)

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability of bike paths</td>
<td>30%</td>
</tr>
<tr>
<td>Improved bike path conditions</td>
<td>27%</td>
</tr>
<tr>
<td>Lockers, shower, and changing facilities at or near work?</td>
<td>23%</td>
</tr>
<tr>
<td>A ride home in case of emergency</td>
<td>18%</td>
</tr>
<tr>
<td>Secure places to park my bike</td>
<td>14%</td>
</tr>
<tr>
<td>Employee benefits for bikers (e.g., provision of company bikes, reimbursement for...)</td>
<td>12%</td>
</tr>
<tr>
<td>Different dress requirements at work</td>
<td>12%</td>
</tr>
<tr>
<td>Access to affordable bikes</td>
<td>10%</td>
</tr>
<tr>
<td>Bike route information and maps at my workplace</td>
<td>7%</td>
</tr>
<tr>
<td>A car I could use while at work, &quot;Zipcar&quot;</td>
<td>7%</td>
</tr>
<tr>
<td>Classes on bike maintenance or biking in an urban environment</td>
<td>5%</td>
</tr>
<tr>
<td>Contact person for information about bike routes, biking tips, etc.</td>
<td>3%</td>
</tr>
</tbody>
</table>

What would encourage more bicycle commuting?

When asked what would encourage them to bicycle to work or do so more often, the most common answers involve capital improvements. The top two mentions were availability of bicycle paths and improved bicycle paths cited by 30% and 27% respectively. Having lockers, shower and changing facilities at work were close to these at 23%. All other factors were mentioned by fewer than 20%.
How is the distance to work related to commuting by bicycle?

We saw in another figure (Figure 62) that distance to work is closely related to mode. This is only common sense. It is also of note that occasional use of the bicycle to get to work is also closely related to distance. What is interesting here is that a substantial proportion of these occasional bikers live at a considerable distance. Thirty-five percent (35%) live from two to four miles away, and a total of 23% live four or more miles away.
How many employees commute via AATA?

AATA is used for the regular commute by 11% of employees, and another 29% use it occasionally. Fifty-nine percent (59%) never use it to commute.
The go!pass and commuting via AATA

Having a go!pass clearly is associated with regular or occasional use of AATA to commute. Of those who regularly use it to commute, 84% have a go!pass, and of those who occasionally use it, a similar percent (88%) also hold a go!pass. But of those who never commute by AATA, only 30% have a go!pass. It is likely that they have the pass simply because of the rule that all full time employees must be provided with one if the organization is to participate in the go!pass program.
How Is Distance to Work Related to Use of AATA to Commute?

Those who commute between two and four miles to work are the employees most likely to the regular users of AATA to commute. Among them, 33% use it to commute. The next most frequent user group is those who live four to ten miles from work (11%).

Unlike the regular users of AATA, occasional users are most numerous at the closest proximity (48%), and their percentages diminish in a linear fashion the farther the employee lives from work.
What factors would encourage more use of AATA?

As asked what factors would tend to increase their use of AATA for commuting, the most frequent answer (31%) was, in effect, better service – faster (express), more direct, and closer to the point of origin. This is a usual answer, but is unrealistic in the short term in that it involves systemic change. The second and third most frequently mentioned changes would be increased service later in the evening (23%) and increased levels of weekend service (22%). These are requests often heard from employees throughout the United States, especially those working in retail or hospitality functions in which late hours and weekend work are common.

All other elements pale in comparison to those items.
What mode is supplanted by Occasional Use of AATA or Bicycle?

We have seen that significant numbers of employees occasionally will use a bicycle or AATA to get to work. What modes are being supplanted when this occurs? That is, what is the usual commuting mode of those who occasionally commute by bicycle or AATA?

The mode most commonly replaced by occasional use of AATA (31%) and bicycling (35%) is driving alone. However, there are also trade-offs with greener commuting modes. For example of those who occasionally bicycle to work 24% usually take the bus all the way to work. Another example: Of those who occasionally use AATA all the way to work, 13% normally bicycle, and another 14% drive to a park and ride and use the bus.

From the perspective of promoting green commuting, these green to green trade-offs are neutral, and probably occur because of weather conditions or similar circumstances. The key market is the occasional user of transit or a bicycle who normally drives to work. That commuter has already crossed a psychological barrier. The challenge at that point is to get him or her to make that trade-off more frequently.
The go!pass
Of all employees responding to the survey, 55% said they have a go!pass, while another 10% said they did not have one but would like one. Another 36% said they did not have one and in fact had no use for one.
Having and using a go!pass

The go!pass is widely used and is an important aspect of many people’s employment. Almost all of the employees (96%) indicated that their employers offer a go!pass, and 55% indicated they have a go!pass. Of that 55%, more than half (60%) said they had obtained the pass more than a year ago. However, in an indication of the aggressive efforts to promote the use of the pass (and thus use of AATA), a total of 40% of those with a go!pass indicated they had received the pass only in the past six months (12%) or in the past year (28%).
Figure 74 The go!pass and having a vehicle

<table>
<thead>
<tr>
<th></th>
<th>Has go!pass</th>
<th>No go!pass but would like one</th>
<th>No and no use for go!pass</th>
<th>All respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has no vehicle</td>
<td>26%</td>
<td>22%</td>
<td>5%</td>
<td>18%</td>
</tr>
<tr>
<td>Has vehicle</td>
<td>74%</td>
<td>78%</td>
<td>95%</td>
<td>82%</td>
</tr>
</tbody>
</table>

The go!pass and having a vehicle

Of all responding employees, 82% said they have a vehicle available to use for their commute while 18% said they did not. Of those with a go!pass, almost three fourths (74%) have a vehicle, while 26% do not. Thus clearly most of the go!pass holders have transportation options.
**Mode used, having a vehicle and a go!pass**

Of those who have a go!pass but no vehicle, 45% take the bus, but more, 55%, commute in other ways. They have only limited modal choice, given their lack of a vehicle.

The more interesting group is those persons with a vehicle. Given that most go!pass holders have vehicles and thus have a choice of commuting modes, how do they choose to commute? Of all those holding a go!pass and having a vehicle, 43% choose to drive to work alone, but 22% commute by bus, and 35% commute in other ways – walking, bicycling, carpooling. The vast majority of those who have a vehicle but no go!pass drive to work (87%). Of the few who do not drive, most use the several “other” means, primarily walking or bicycling.

The important comparison is between those two groups – those with and without a go!pass and who have a vehicle. If employees have a vehicle and no go!pass, they normally will drive to work (87%). Only 2% will take the bus all or part of the way. But if they have a vehicle and hold a go!pass, they are much more likely to take the bus (22%) than if they lack a go!pass. Interestingly, he or she is also more than three times likely to use “other” means to commute, including walking, bicycling, and, for a few, carpooling.

It is clear that having a go!pass is associated with a much greater likelihood of using public transit to commute among those with commuting options. One challenge is to convince the 43% of those with a go!pass and a vehicle, to park the vehicle and use the bus at least occasionally.
Interest in Commuting by Alternative Modes
How interested are SOV commuters in using alternative modes?

The SOV commuters were asked to rate their level of interest in alternative modes for commuting on a scale from one to seven on which seven means very interested and one means not at all interested. The results provide an approximate measure of the potential market for the services of getDowntown. Essentially we have a total of 15% that we may consider to be quite interested, having scored six or seven on the scale.
Figure 77 How does interest in using alternative modes vary with income?

How does interest in using alternative modes vary with income?

Another indication that interest in use of alternate modes of commuting is driven more by personal economics than by concern with green issues is the relationship between income and interest.

To simplify the chart, respondents were classified in terms of their level of interest in using commuting modes other than the SOV. A score of 6 or 7 was considered “Some to strong interest,” while a score of 4 or 5 was labeled “Neutral,” and score from 1 to 3 were labeled “Negative interest.”

While only 19% of employees in households with incomes of $50,000 or more (i.e., above median income) have what we have called “some to strong interest,” 40% of those with incomes of $20,000 to $49,999 rise to that interest level as do 30% of those with incomes of less than $20,000. Moreover, what we have called “negative interest” is much higher among those with the highest incomes (69%) compared with those with lower incomes.
How does interest in using an alternate mode vary with awareness of getDowntown?

Awareness of getDowntown is associated with greater levels of interest in using modes other than the SOV. Those employees aware of getDowntown are approximately twice as likely (31%) as those unaware (16%) to have some to strong interest in using an alternative mode to commute.
How does interest in using alternative modes vary with age?

Interest in using the bus, walking, or bicycling does not vary in a neat and continuous manner with age. However, rejection of the idea does rise from the age of 18 through 65 with only a minor deviation between the ages of 45 and 55. The difference, however, is in the diminution of the neutral category and not in an increase in the some-to-strong-interest category.

The relationship between interest and age is income-related. The strongest positive interest occurs among those in the 18 – 35 year old range and among those 65 and over, which tend to be lower income periods of the life cycle and is weakest in the peak earning years between 36 and 65.
Have commute modes changed in the past year?

Most employees (77%) say they commute now in the same manner they commuted a year ago. Conversely, this means that 23% have changed their mode. Most of those who changed modes did so a year ago, or within the past six to eight months.
For what reasons do commuters say they changed modes?

Why did those who changed modes do so? People change commuting habits for multiple reasons. The number of those who changed their mode was small in the sample (n=43) and thus not entirely reliable, but it does appear indicative of major reasons.

The two reasons offered most frequently were that the person had moved (45%), and that a go!pass was available (42%). These two factors are much more influential than any others. Changes of circumstance other than a residential move also play a role. Thus, 17% cited a change of work schedule, and 14% a change of job location. Apparently, any change of circumstance such as these provides an opening for people to consider a mode change. If a go!pass is made available at the time of the change, and if other conditions are right (i.e., distance, hours, not having to use a personal vehicle at or on the way to work), this would be the point of greatest influence on commuting practices.
Respondents were asked how their commuting habits had changed. The chart shows in green the changes that are more “green” than the previous mode, and in brown, changes that were in the opposite direction. A respondent can appear in only one of these bars. They are mutually exclusive. The sum of all changes, including pluses and minuses for “green” commuting, represents a net gain of 40% among those who had changed modes. Since only 11% of respondents said they had changed their commute mode, this means the net change in a green direction is 40% x 11% = 4%.

Another indication of the success of the go!pass program is that the most common shifts, other than going from driving to walking to work (15%, presumably due to changed proximity) involved going from driving to work to commuting by bus. The change from driving to using the bus for the entire commute or driving to the bus stop and taking the bus were the two major shifts.
Social Media Use
To what extent do downtown Ann Arbor employees use social media?

More than three fourths (77%) of the downtown employees use Facebook, but fewer than one fourth (22%) use Twitter. Very few have visited the getDowntown Facebook page or Twitter feed (7%).

Examination of data elsewhere has convinced the author that for many purposes such as finding information about transportation, many people – especially those under 35 -- prefer to rely on passive activity – i.e., they await messages rather than seeking information. For example, they do not want to check a website to see if their bus is on time. They want the transit authority to send them a text message. Thus, simply having a Facebook page (or website), while useful for the relative few who are information-seekers, by no means provides assurance that the many users of social media will in fact utilize the information thus available unless their interest is somehow peaked by a source or motivation related to the specific matter at hand – in this case green, cost-saving commuting.

Strategic, proactive messaging, especially on Facebook, but also on Twitter can pay dividends but needs to be carefully planned and the messages need to be substantive. Having supporters who occasionally post about positive experiences with AATA and bicycling can also be a major positive force.
Figure 84 How does the use of social media vary with age among downtown Ann Arbor employees?

In terms of social media strategy, it is hardly a secret that utilization is age-related. Remarkably, however, of those employees up to the age of twenty five responding to the survey, 99% said they use Facebook. This is as extreme a form of market penetration of an age segment as the author has seen. In addition, 84% of those between twenty six and thirty five say they use Facebook. Of the eldest (36 or older) among those responding, 59% use it.

We have already seen that simply having a Facebook page does not assure its utilization. However, it is clear from the results shown in the chart above that having a social media strategy, including, of course, a Facebook page, is an essential channel of communication with the youngest employees. Given that interest in the use of money-saving and green commuting modes is greatest among the youngest and oldest employees, it is also clear that while the use of social media has the potential to be a channel of communication with the young, it will be inadequate for those employees over thirty six, and especially those at the upper age ranges or 50 and older.
Conclusions and Recommendations
Conclusions take time to become clear as a report such as this is digested and as new interpretations and questions about the results are developed in discussions. From time to time additional tables may be needed to clarify certain points. For these reasons, it is CJI Research policy to maintain the data in an active state such that a reasonable number of additional tables can be produced at the client’s request quickly and at no additional cost.

Meanwhile, the data suggest several preliminary conclusions that may be useful in thinking about marketing getDowntown services to employers. This concluding section offers these as items to consider, discuss, and expand upon. Some or all of these may already be aspects of the getDowntown marketing plan.

- **Awareness.** Awareness of getDowntown, and awareness of most of its programs especially go!pass and Commuter Challenge is quite high. The marketing challenge is not primarily one of raising awareness of the organization or even of the go!pass. The marketing challenge is primarily one of altering behaviors, a much more difficult task.

- **Commuter Challenge.** Awareness of the Commuter Challenge is high, and the program appears popular. It should certainly be built upon. One comment made by an employer was that it was a good morale builder, and this might be considered an ancillary benefit program. Moreover, it obviously expands awareness of the getDowntown program with all its various components.

- **Success.** First, it is clear that the getDowntown programs, especially the go!pass, are already strongly associated with a reduction in driving oneself to work alone. Go!passes are valued by many as an inexpensive and important benefit employers can provide, especially to lower income employees. Employees value them for their cost savings, and because many of them are transit dependent.

- **Positioning:** The priority is financial; environmental considerations are secondary. Second, and most important for positioning of the go!pass program, it is clear from the points of view of both employers and employees that for most of them, the factor that moves them to become involved with getDowntown and the go!pass is more about money and less about environmental concern. This seems to run counter to the green-orientation and original motivation for the existence of getDowntown, but it is critical to the prospects for marketing the go!pass and other services to employers who are, the survey indicates, less concerned about the environment and even about congestion, and more concerned with the bottom line.

  - There is evidence of this in several places in the survey data. For example, employers emphasize that what motivates them to become involved in promoting green commuting would be savings on parking, providing a low cost benefit to employees, and tax savings for the organization. The lowest scoring items in terms of moving them to participate were information on the environmental benefits of alternative forms of commuting, and visible recognition for their organization for
promoting such commuting.

- In addition, those employers that were most interested in and likely to use the go!pass were those whose organizations involve rote or manual labor rather than mind work. The reason for this is that they considered being able to offer the go!pass is a significant benefit to the types of workers they need to employ, who tend to be fairly low wage and often do not have vehicles. On the employee side it is clear that those SOV commuters with incomes of $50,000 and greater were much less interested in finding alternative modes than were employees who earn less than that.

- Given that this is the case, the financial arguments should be a core message in all marketing efforts directed to employers with environmental themes a helpful, but secondary theme. An example of the need for this is that at present only 10% of the employers in the getDowntown database say they offer a commuter tax benefit. And yet many employers say that what would motivate them would be cost savings. Perhaps they do not know that an employer also saves money on providing a tax-free benefit to employees because the FICA match is this reduced.

- Of course there are other financial benefits to the employer as well, chief among them avoiding the cost of subsidizing parking, and having a wider pool of employees from which to hire. Regarding the parking costs, 46% of the employers said they either provide free parking or they pay all parking costs for employees. In either case they are paying organizational funds to encourage driving to work rather than saving money by promoting the go!pass.

- It is not within the scope of this report to attempt this, but it should be quite possible to determine for various types of organizations an estimate of typical cost savings that would be incurred by providing go!passes to, let us say, 5, 10, or 15 employees. Such a model could be put online, and would show that the net cost to employers would be relatively small.

- All of this is not to say that environmentally positive effects of green commuting should be avoided in marketing approaches used by getDowntown. They, in fact, should be used and emphasized because they provide a generic and popular image. Moreover, they do have an emotional and political appeal to many people beyond the bean-counting approach. However, the core market is the employer who purchases go!passes. To the employer the critical thing is cost saving, and the size and caliber of the labor pool - not the environmental impact.

- Targeting. Of all organizations responding to the survey, 63% had not purchased go!passes. Organizations most likely to have purchased go!passes are those with 21 or more employees. We would speculate that these are also probably the kinds of large organizations that become involved in development issues in the downtown area and are active in such matters. Thus they probably have an additional intangible business motivation to participate getDowntown and purchase go!passes for their employees. While they are a key market, we suspect they are not the primary expansion market for increasing employer purchases of go!passes.
Organizations of 2 through 20 employees appear to be the most fertile ground for expansion in terms of sheer numbers of employers. Among them, 56% have purchased no go!passes, yet many of them have relatively low wage workers who would value and use a go!pass.

This is not to say that the larger organizations with 21 or more employees should be neglected. After all, 26% of them have also not purchased go!passes.

It would be useful to seek a method such as the Hoovers Directory or local sources that could determine roughly the size of businesses so that they could be better targeted. One of the things lacking in the existing database of roughly 1200 organizations is any indicator of size in terms of employees and in terms of the size of facilities including available parking. For purposes of targeting promotion of getDowntown services (especially go!passes), having that additional data would be invaluable, although it is costly to obtain and maintain.

One employee group that should be targeted, although it is difficult to identify individuals, includes those people who occasionally substitute the use of transit or bicycling for driving alone to work. Given that they have already overcome the psychological barrier that creates inertia among many drivers in terms of even trying to use an alternative mode, one objective should be to attempt to increase the frequency with which they use either a bicycle or the bus. Airlines, grocery stores, and others achieve this with loyalty cards. It would be very difficult to accomplish that by means of the go!pass, both organizationally, and in terms of interaction with the farebox, but in the long run it might be possible (for example) to increase discounts or provide other benefit depending upon usage.

One type of employer that should be targeted is the employer that uses a great deal of relatively low-wage labor. This would include restaurants, retail establishments, and service businesses. The reason is that such employees receive very few benefits this would be a very inexpensive benefit to provide, and it would make the pool of available employees larger.

- This is not to say that organizations which use mind work, and are dominated by relatively high wage white-collar workers should not be targeted, but it is to say that according to the survey results they are less likely to participate. The exception will often be the relatively large employer whose executives are involved in downtown issues and who thus have ancillary reasons for dissipation in getDowntown activities.
- Of all employees who drive to work, 15% said that they are interested in finding alternatives. There is no way in which a group like that can easily be targeted with precision. However, further analysis may reveal that they are heavy users of social media, younger, and/or work in certain kinds of occupations. These are the kinds of further analyses that can be undertaken over time.

**Advocacy.** Although advocacy was not among the services that employers said they valued most in the panoply of getDowntown activities, there are several areas in which getDowntown advocacy could be put to very good use.
One of the key factors in encouraging greater use of bicycles is having better bike path conditions. We have seen that same concern in other cities in which we have performed similar studies. For example in Champaign Urbana Illinois, and the campus of the University of Illinois located there, bike paths were being avoided, and other modes of transportation were being used, when we studied commuters there in 2005 because the paths were in poor condition and they were shared by pedestrian traffic. Both of these factors made riding bicycles on the paths somewhat treacherous and demand for improvement was a key precondition for increased use. We cannot attest to the condition of bike lanes or bike paths and Ann Arbor, but the commuters’ concerns appear similar.

One of the things that employees said would motivate them to use the bus more, or make it possible for them to use the bus more often, would be service later in the evening and service on weekends. Again this is a concern we hear in many studies of transit passengers nationwide, especially among those passengers, usually younger persons, who are employed in retail or restaurant establishments that need them as workers but that stay open late in the evening and are open on weekends.

In terms of other big picture items that might be of concern and a subject for getDowntown advocacy, the importance of improving transportation options in general would be of interest to downtown employers. Of the employers studied, 62% see community investment in additional transportation options as very important. However, only 43% see congestion as detrimental for their own organizations. Perhaps they are not connecting the two phenomena, or perhaps they tend to have a belief in the importance of public transportation apart from the self-interest of their organization. Demonstrating that traffic congestion presents problems for all types of organizations, particularly on-site customer service organization such as restaurants and retail establishments, is a message that getDowntown should promote.

- The decision to locate downtown. The Downtown Development Authority may be interested in the data concerning location decisions being made by those organizations within the getDowntown database. They are surprisingly likely to face relocation decisions. Of all organizations participating in the survey, 47% said they had faced a location decision since 2009. Substantial numbers of organizations faced decisions whether to move to downtown from elsewhere (8%), whether to establish a new location in downtown Ann Arbor, or whether to move out of downtown (16%) (Others were moving within the downtown, a factor of less concern in terms of commuting and downtown development.)
  - Of organizations with 21 or more employees, 16% said that they had had to consider a decision whether to move out of the downtown area. Of organizations with two through twenty employees, 19% had considered a move out of downtown. We do not do not know their motivation, and whether it had anything to do with commuting, or traffic congestion.
  - These facts have several implications:
    - First, there is considerable mobility and potential for mobility among these organizations. This implies that there is a considerable challenge to getDowntown organization in terms of continually updating business on its programs, and a continuing need to market alternative commuting methods to businesses that are
relocating into the downtown area or considering relocation there or elsewhere. We assume, given the relationship between getDowntown and the Downtown Development Authority that the services and advantages of getDowntown are made part of the development information package for companies considering relocation.

- Only a few employers of any size indicated that the go!pass and getDowntown programs had a great deal of impact on their decision to locate downtown. However, many said they were a significant factor, and a few said they were very important.

- Moreover, a total of 22% of employers participating in the go!pass program said that for attracting and or retaining employees in their downtown locations that the go!pass program was either crucial (3%) or important (19%) and that it would be difficult to recruit or retain employees without it. The balance of go!pass participants said it would be somewhat important for employees although not critical. In short, approximately one fourth of current go!pass participants find very significant value in the program in terms of employee recruitment and retention in a downtown location.

- Presented in general terms, in its effect on location decisions, employers see the go!pass as of some importance, while presented as a specific element in attraction and retention of employees in a downtown location, it is seen by some employers as extremely important and by employees as valuable. This is the key marketing appeal.