

**H-GAC Travel Options Planning and Research Study:
Concurrent Phases 1 and 2**

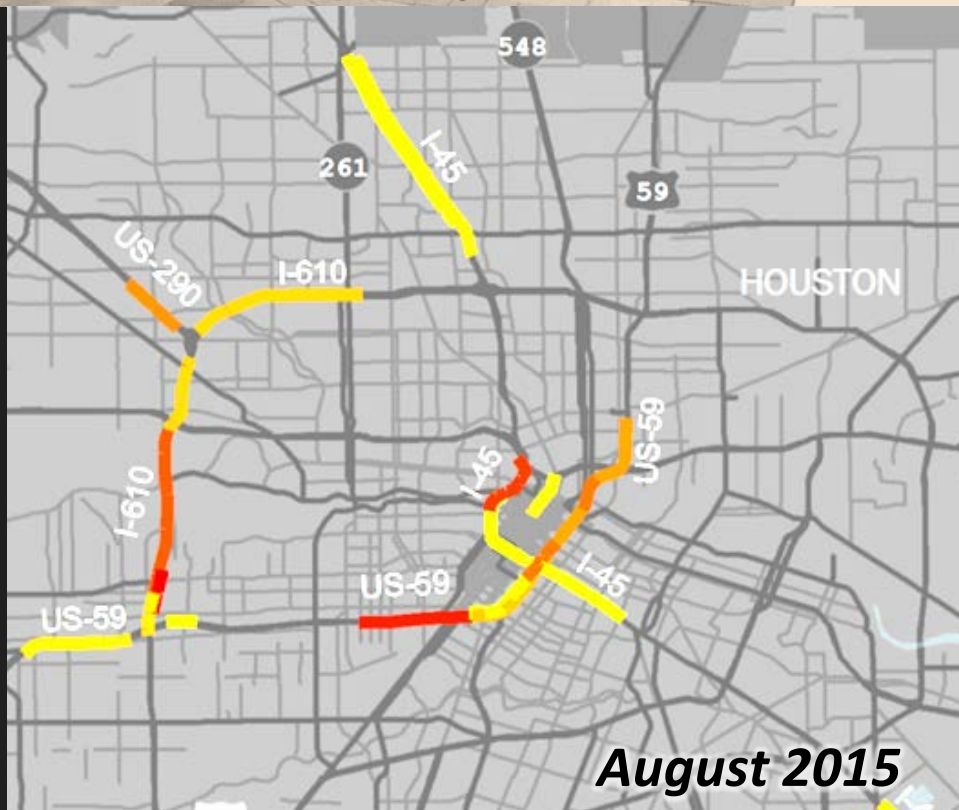


Prepared for the
Houston-Galveston Area Council



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PROJECT SPONSORS

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Cover image (top) credit: Jonathan Brooks, Texas A&M Transportation Institute

Cover image (lower right) credit: Top 20 Congested Highway Segments in 2012, Houston-Galveston Area Council



TTI's mission is to identify and solve transportation problems through research, to transfer technology and knowledge, and to develop diverse human resources to meet the transportation challenges of tomorrow.

<http://tti.tamu.edu>

PREFACE

This executive summary and companion website www.ghcommutes.org document the survey portion of a study of commuter and employer transportation preferences in the greater Houston region. The Texas A&M Transportation Institute (TTI) conducted the outreach on behalf of the Houston-Galveston Area Council (H-GAC) in fall 2014.

The greater Houston region has three of Texas' most congested highway corridors: IH 45 North, US 59 South, and US 290. A major contributor to this congestion is the large number of single-occupancy vehicles driven by commuters traveling to and from work. More than 7,000 commuters and 60 employers from across the region (see Figure 1) shared their opinion about commuting and preferred incentives.

Findings from the study enable H-GAC and partners to review and improve incentives aimed at managing roadway congestion by boosting participation in alternative travel modes, telecommuting, alternative work schedules, and other practices.

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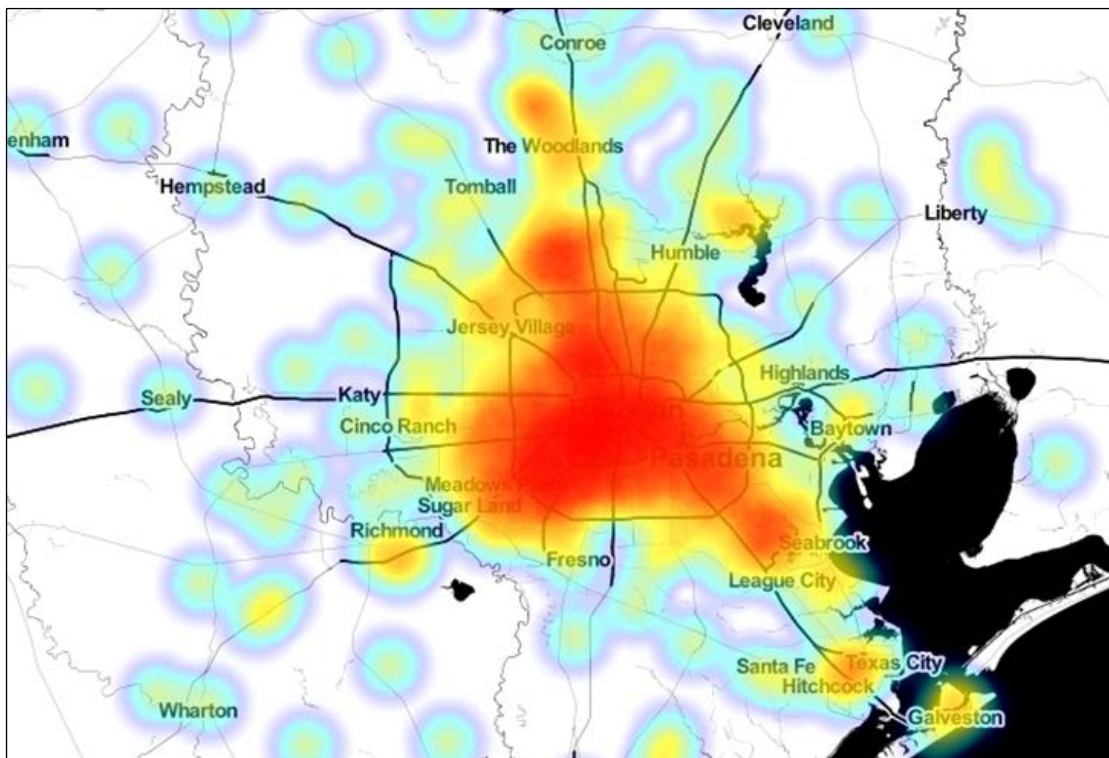


Figure 1. Heat Map of 7,249 Commuter Responses by Home ZIP Code

PURPOSE AND AIMS

Because the Houston region's growth is expected to outpace expansion of highways and transportation infrastructure, efforts to reduce the number of single-occupancy vehicles on the region's congested roadways are critical. The annual *2012 Urban Mobility Report* found that in 2011 the greater Houston region experienced about 145,832,000 hours of traffic delay at a cost of \$3,120,000,000.¹ In other words, each vehicle experienced about 52 hours of delay at a cost of \$1,090 per person in the region.

GROWING POPULATION

The Houston region is currently home to about 6.5 million residents. According to H-GAC's Regional Growth Forecast, a steady growth pattern over the next 30 years means that the region's population is expected to reach 10 million people by 2040.² Given that 75 percent of the population aged 16 to 64 years actively participates in the workforce,³ the region's infrastructure will need to be able to transport more commuters to and from work sites across the region—whether physically or by virtual means such as teleworking or telecommuting.

The future of the greater Houston region is bright:

- Fourth in the nation in regional gross domestic product, in 2013 the Houston region's economy grew more than any other in the United States.
- Approximately 1.5 million jobs will be added by 2040, for a total of almost 4 million.⁴

The consequences of population and economic growth include increased vehicular travel (expected to increase by about 60 percent above current levels by 2040) and freight movement (expected to double by 2040).

¹ *Congestion Data for Your City Spreadsheet*, 2012 Annual Urban Mobility Report, TTI, <http://mobility.tamu.edu/ums/>

² *Summary Charts of H-GAC 2015 Q2 Forecast*, H-GAC, www.h-gac.com/community/socioeconomic/2040-regional-growth-forecast/default.aspx

³ *Work Status in the Past 12 Months*, Houston-The Woodlands-Sugar Land Metro Area, 2009-2013 American Community Survey, U.S. Census Bureau

⁴ *Introduction*, 2040 Regional Transportation Plan, H-GAC, www.h-gac.com/taq/plan/2040/default.aspx

CONGESTION AND CONSTRUCTION

The greater Houston region experiences recurring traffic congestion during morning and evening peak travel times on many highway segments. In fact, the Texas Department of Transportation's annual list of the top 100 congested highway segments notes that as of August 2014, the greater Houston region contained more than 35 of the top 100 most congested highway segments in Texas.⁵

In addition, ongoing construction on US 290 and programmed construction along IH 45 North and US 59 South exacerbate already heavy traffic flow (Figure 2). Particularly during large construction projects such as these, it is important to understand commuters' interest in and access to alternative transportation programs and incentives. The region has ongoing efforts to manage congestion using many tools and resources.⁶ The H-GAC Travel Options Planning and Research Study seeks to provide information to help the region better address commuter and employer preferences.

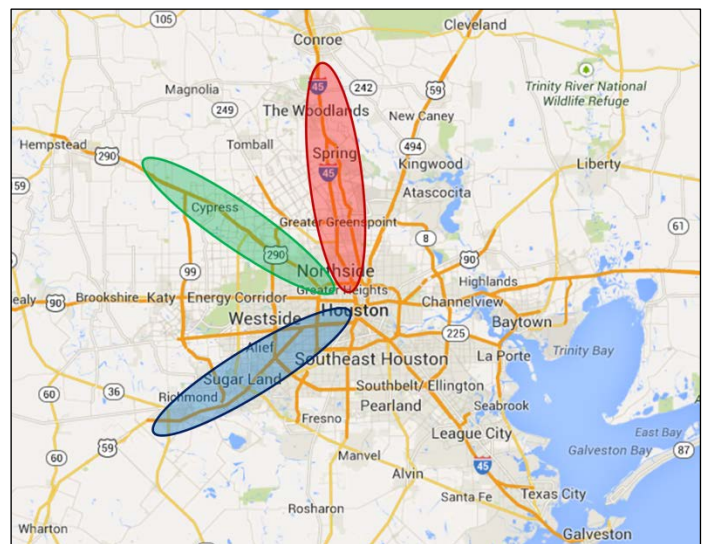


Figure 2. Study Focus Corridors

CURRENT COMMUTE MODE

The 2009 National Household Travel Survey found that commuting to and from work sites accounts for just 16 percent of all passenger vehicle trips in Texas.⁷ The

⁵ *Top 100 Congested Roadways*, Interactive Map, TxDOT, accessed May 2015 at <http://maps.dot.state.tx.us/top100/>

⁶ *Appendix I: Congestion management Process*, 2040 Regional Transportation Plan, H-GAC, www.h-gac.com/taq/plan/2040/docs/Appendix%20I%20CMP.pdf

⁷ *Passenger Travel by Trip Purpose*, Texas Transportation by the Numbers, U.S. Department of Transportation, www.rita.dot.gov/bts/sites/rita.dot.gov/bts/files/texas_11x17.pdf

most common trip purposes were family/personal business (42 percent) and social/recreational (26 percent). Although commute trips represent a relatively small portion of total passenger trips, their impact is great. Commute trips are largely responsible for congestion because the majority of these trips occur during morning and evening peak travel periods.

The U.S. Census Bureau conducts the American Community Survey on a rolling basis each year. The most recent data, 2009–2013, for the nine-county Houston–The Woodlands–Sugar Land Metropolitan Statistical Area revealed that 80 percent of commuters drove alone to work most days, with the remaining 20 percent employing alternatives such as carpool, vanpool, working from home, public transit, walking, and other means:

- 80 percent drove alone.
- 11 percent carpooled or vanpooled.
- 3.3 percent worked at home (i.e., telecommuted).
- 2.4 percent used public transit.
- 1.9 percent used other means.
- 1.4 percent walked.

STUDY METHOD

H-GAC obtained State Planning and Research funds from the Texas Department of Transportation to study and improve commute-related incentive programs. H-GAC's aim is to better understand congestion, particularly along the IH 45 North, US 59 South, and US 290 corridors, and to assist companies and commuters with commute solutions. H-GAC engaged the research services of TTI to conduct survey-based research into current practices and preferences of both employers and commuters. The scope of work and timeline for the study are as follows:

- 2014: Baseline survey and measurement of utilization of alternatives.
- 2015: Work with partner organizations to adjust incentives and programs.
- 2016: Follow-up survey and measurement of change in utilization of alternatives.

This section summarizes the study methodology and provides important context for the findings presented in this executive summary and at www.ghcommutes.org.

SURVEY INSTRUMENT

The commuter survey contained 103 questions, and the employer survey contained 56 questions. Researchers took great care to develop comprehensive surveys that were also logical, efficient, and readable. Both survey instruments were reviewed and approved by the Texas A&M University Institutional Review Board. The instruments employed extensive survey logic so that respondents saw only relevant questions based on their previous answers.

The surveys inquired about the following topics:

- Commutes to and from work and school.
- Mode-specific follow-up questions.
- Employer policies and commuter preferences.
- Experience with commute alternatives.
- Incentives (financial and other services).
- Adaptation to change.
- Communication preferences and demographics.

Survey instruments functioned on desktop and laptop computers, tablets, and smartphones (Figure 3). Both surveys were available in English and Spanish, and a print version of the commuter survey was also available.



Figure 3. Survey Device Compatibility

NON-RANDOM SAMPLE

A typical survey approach is to collect a small but random sample of the study population. A random sample survey allows for statistical analysis and discussion of public opinion based on the assumption that the random sample is highly likely to represent the larger study population. For this study, researchers did not collect a random sample but instead worked in close partnership with dozens of area organizations to collect a large number of non-random commuter and employer responses. More than 70 organizations assisted by inviting employers and commuters to take the survey.

OUTREACH PROCESS AND PARTICIPATION

Partner organizations played a critical role in promoting the survey by inviting their constituent employers and commuters to participate. To aid in this effort, researchers provided partner organizations with a unique link to the surveys, as well as flyers, a printable commuter survey, social media blurbs, and recommended message content in English and Spanish (Figure 4).



Figure 4. Spanish Flyer

The surveys were open for 67 days from October to December 2014. Overall survey participation and respondents' participation experience are summarized by the following statistics:

- **Survey participation**
 - 43 unique links to the surveys.
 - 10,813 hits on the surveys.
 - 7,249 complete commuter responses.
 - 213 complete employer responses.
- **Respondents' participation experience**
 - Average completion time was 18 minutes.
 - 9 percent used a mobile device.
 - 84 percent agreed survey was user friendly.
 - 4,550 shared email addresses for follow-up.

The response is not a random sample but is a large dataset of responses indicative of a variety of commuters in the greater Houston region, such as:

- People born in the region to recent transplants.
- Students to senior career level.
- People seeking employment, retirees, people with one job, and people with two or more jobs.
- Adult men and women of all ages, household sizes, income levels, and race/ethnicity.
- People with no personal vehicle and people with multiple personal vehicles.

Learn more at www.ghcommutes.org/?p=206.

COMMUTER FINDINGS

Commuter survey respondents use a variety of travel modes to access work or school. Some respondents vary their commute practice based on the day of the week, and other commuters use the same mode every day. Commuter survey responses in terms of primary commute practice were:

- Commuters that **only drive alone**
 - 4,058 respondents (56 percent of total).
- Commuters that **drive and use alternatives**
 - 1,835 respondents (25 percent of total).
- Commuters that **only use commute alternatives**
 - 1,305 respondents (18 percent of total).
- Other commuters
 - Not in workforce (39 respondents).
 - Unemployed (5 respondents).
 - Retired (7 respondents).

The following sections summarize findings in key areas:

- Review of happiness and money/time savings.
- Reasons for mode choice.
- Potential impacts in the next five years.
- Preferred transportation investments.
- Preference for employer policies.
- Motivational power of commute incentives.
- Preferred communication methods.
- Identification of the region's key challenges.

The information provides insight that may assist the greater Houston region in developing, promoting, and incentivizing alternative commute modes.

COMMUTER HAPPINESS, MONEY, AND TIME

Commuters provided insight into their current commutes by indicating their level of agreement with statements about happiness and time and money savings. A one-to-five scale, where one was equivalent to "strongly disagree" and five was equivalent to "strongly agree," was used to create averages for each pool of commuters. Figure 5 depicts commuter responses to three statements. Most commuters are happy with their current commute. Drive-alone and drive-and-alternatives commuters recognize potential money savings may exist. On average, commuters do not agree time savings are possible.

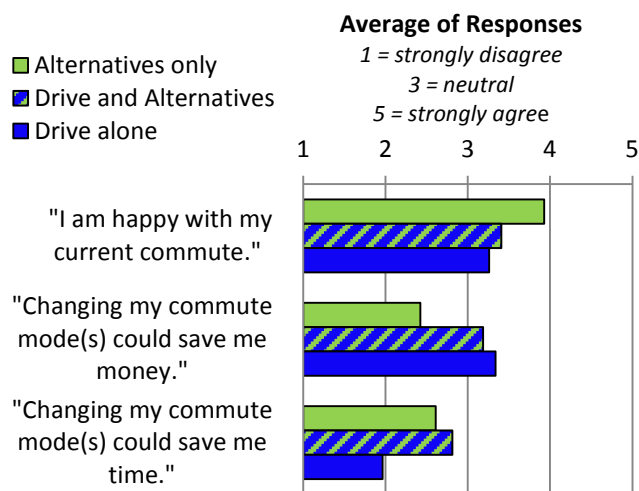


Figure 5. Review of Current Commute

MOST IMPORTANT REASONS

Respondents shared why they commute the way they do by selecting and ranking up to three reasons underlying their decision to use a mode. Figure 6 summarizes the top three or four cited reasons by mode.

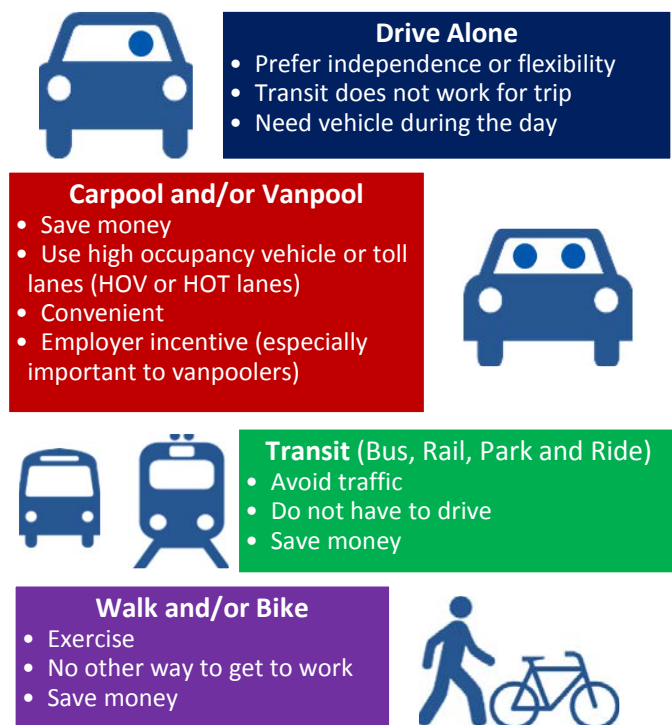


Figure 6. Top Reasons for Commuter Mode Choice

If commuters indicated they used only one mode, they were prompted to identify whether they felt they had a viable alternative way to travel to work the next day (Figure 7).



Figure 7. Viable Travel Alternative

See a map of drive-alone commuters with alternatives by ZIP code at www.ghcommutes.org/?p=977.

COMMUTE IMPACTS IN THE NEXT FIVE YEARS

Survey participants reviewed three scenarios and identified the scenario they felt would have the greatest impact on their commute over the next five years:

- **47 percent** indicated **construction delays**.
 - **43 percent** indicated **fuel topping \$5.00 a gallon**.
 - **10 percent** indicated **local economic downturn**.
- (view a map at www.ghcommutes.org/?p=979)

Figure 8 highlights how commuters are likely to adapt in light of the scenario they selected.

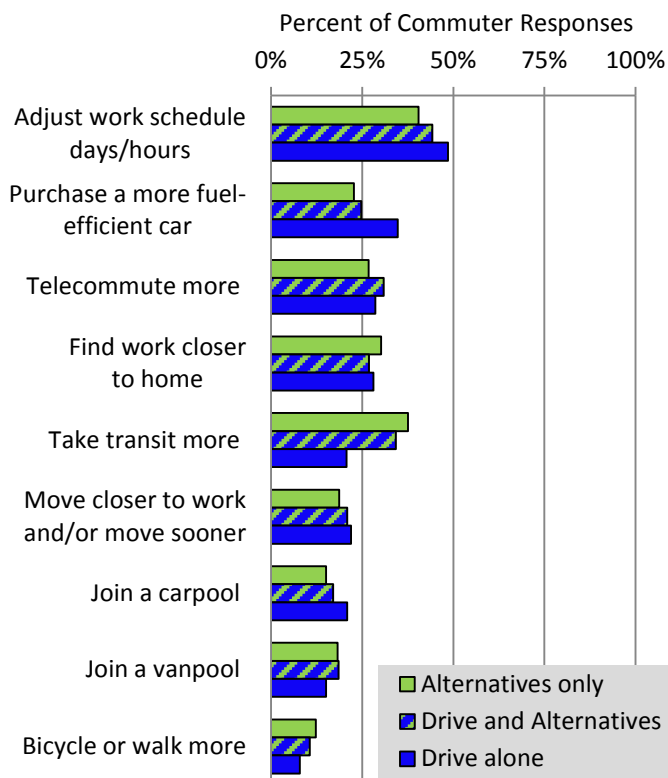


Figure 8. Likely Commute Adaptations

Construction delays are the most common concern. View a map and learn more about how this group is likely to adapt at www.ghcommutes.org/?p=555.

TRANSPORTATION INVESTMENTS

Commuters selected their preferred focus for transportation investments they felt would be best for the greater Houston region:

- Improve transit, walking, and biking (55 percent).
- Expand or build new highways (31 percent).
- Maintain existing highways (15 percent).

Responses regarding transportation investment priorities varied around the region. When viewed by home ZIP code, respondents living outside US 99 Grand Parkway were more likely to support investing in expanding or building new highways. Respondents in ZIP codes near or inside Beltway 8 indicated more support for road maintenance and transit, pedestrian, and biking investments (view maps at www.ghcommutes.org/?p=925).

EMPLOYER POLICIES

Many commuters are interested in adopting alternative commute modes to supplement or replace the practice of driving alone. Commuters were asked about four specific policies that employers may adopt to encourage employees to choose alternative commute modes. Commuters without access to an incentive, or who were unsure, shared their interest using a one-to-ten scale. Responses were grouped into three pools: not interested (one to three), neutral or little interest (four to seven), and interested (eight to ten).

Preferred Parking for Carpool/Vanpool

Table 1 summarizes current availability of a preferred parking incentive for carpool and vanpool users.

Table 1. Status of Preferred Parking Incentive

| | Alternatives only | Drive and alternatives | Drive alone |
|---------------|-------------------|------------------------|-------------|
| Available now | 28% | 29% | 14% |
| Not available | 46% | 49% | 60% |
| Do not know | 21% | 20% | 24% |

About 21 percent of commuters without the option of preferred parking, or who did not know, indicated an interest in preferred parking for carpool and vanpool users (Figure 9).

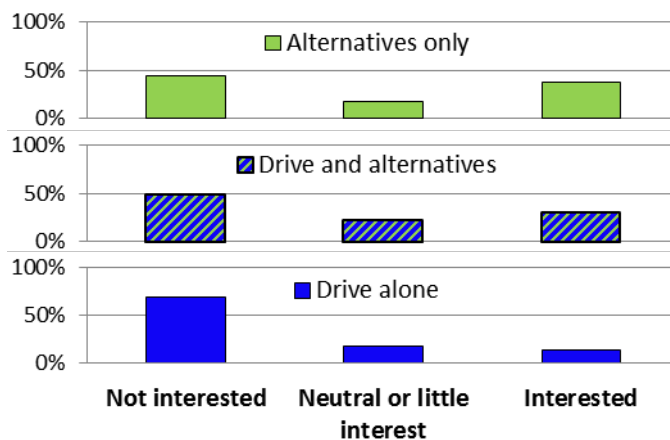


Figure 9. Interest in Preferred Parking

See interest in preferred parking by ZIP code at www.ghcommutes.org/?p=652.

Parking Cash-outs

A parking cash-out is a financial incentive provided by an employer to employees who do not require a parking space. Table 2 summarizes current availability of a parking cash-out incentive.

Table 2. Status of Parking Cash-out Incentive

| | Alternatives only | Drive and alternatives | Drive alone |
|---------------|-------------------|------------------------|-------------|
| Available now | 3% | 2% | 1% |
| Not available | 76% | 84% | 83% |
| Do not know | 17% | 12% | 14% |

Commuters without cash-out incentives answered a follow-up question; 27 percent were interested in a parking cash-out incentive (Figure 10). See this information on a map at www.ghcommutes.org/?p=658.

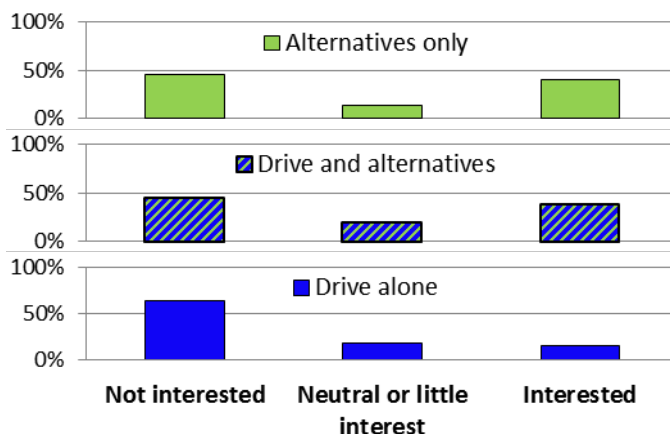


Figure 10. Interest in Parking Cash-out

Alternative Work Schedules

An alternative work schedule can mean flexible work hours or a compressed workweek. Table 3 summarizes the current availability of a parking cash-out incentive.

Table 3. Status of Alternative Work Schedule Incentive

| | Alternatives only | Drive and alternatives | Drive alone |
|---------------|-------------------|------------------------|-------------|
| Available now | 37% | 44% | 33% |
| Not available | 55% | 51% | 61% |
| Do not know | 4% | 3% | 4% |

About a third of commuters have the option of an alternative work schedule; of the two-thirds without the option, 58 percent are interested in alternative work schedules (Figure 11).

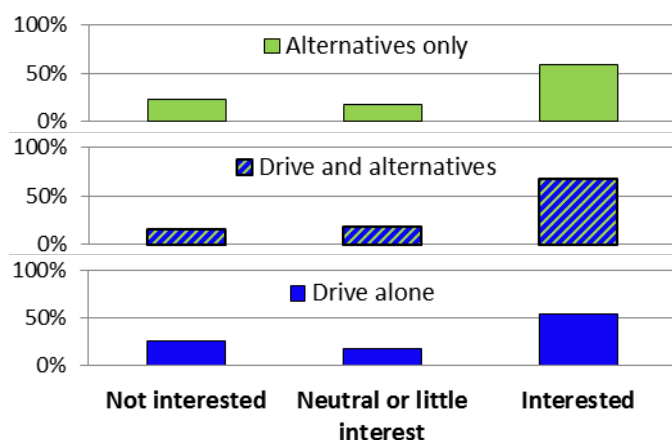


Figure 11. Interest in Alternative Work Schedule

See a map depicting how interest in alternative work schedule varied at www.ghcommutes.org/?p=656.

Teleworking and Telecommuting

Teleworking is working primarily from home. Telecommuting is working some hours or days from home. Overall, about 20 percent of respondents indicated their employer allows telework or telecommute, and about another 20 percent indicated their job was not conducive to either (Table 4).

Table 4. Status of Telework/Telecommute

| | Alternatives only | Drive and alternatives | Drive alone |
|--|-------------------|------------------------|-------------|
| Available now | 18% | 27% | 19% |
| Not available | 55% | 53% | 56% |
| Not applicable; job requires physical presence | 23% | 18% | 23% |

More than half of respondents had conducive job duties but lacked the opportunity to telework or telecommute; 67 percent of them were interested in telework or telecommute (Figure 12). View how interest varied by ZIP code at www.ghcommutes.org/?p=658.

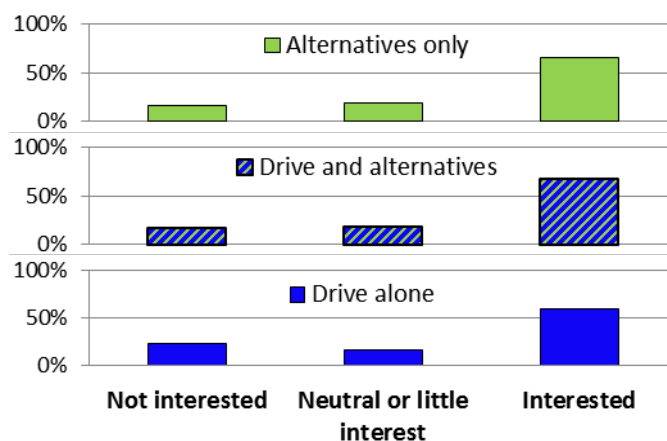


Figure 12. Interest in Telework/Telecommute

Respondents that already telework/telecommute some of the time indicated they choose to do so because they like the *convenience, can avoid traffic, and just want to*.

Respondents that would like the opportunity to telework/telecommute some of the time desire the option in order to *avoid traffic, save money, and to have the convenience*.

COMMUTE INCENTIVES

Commuters expressed their interest in various incentives (financial and otherwise) to motivate them to adopt commute alternatives. Respondents ranked each incentive from one to five, where one indicated no extra motivating power and five indicated much more motivating power to consider commute alternatives. The following two sections summarize findings for financial incentives and other incentives. Explore more in-depth findings at www.ghcommutes.org/?p=999.

Financial Incentives

Respondents rated their preference for seven financial incentives based on the incentive's ability to motivate the respondent to consider commute alternatives. The top four preferred financial incentives were lower car insurance cost, tax benefits, lower tolls on HOT lanes, and free or discounted transit passes (Figure 13).

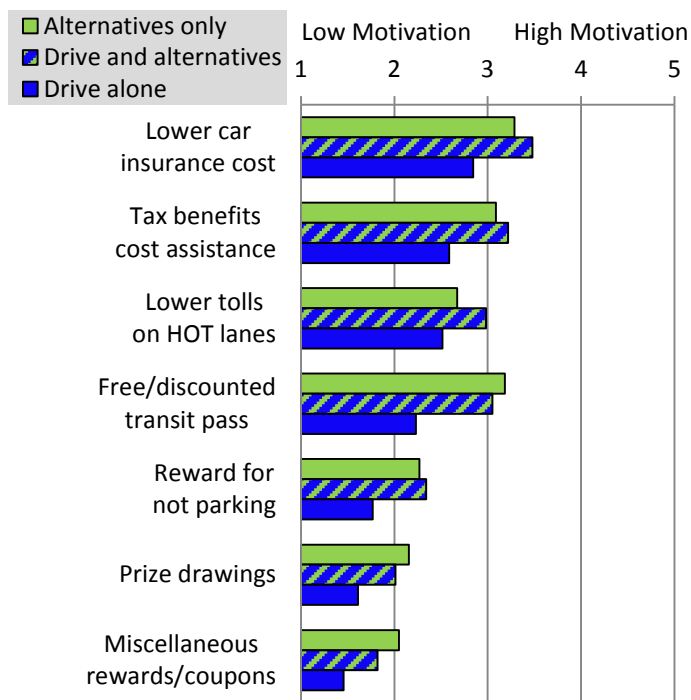


Figure 13. Motivating Power of Financial Incentives

Other Incentives

Respondents rated their preference for eight additional incentives based on their ability to motivate them to consider a commute alternative. The top three incentives were closer transit, alternative work schedule, and more reliable transit (Figure 14).

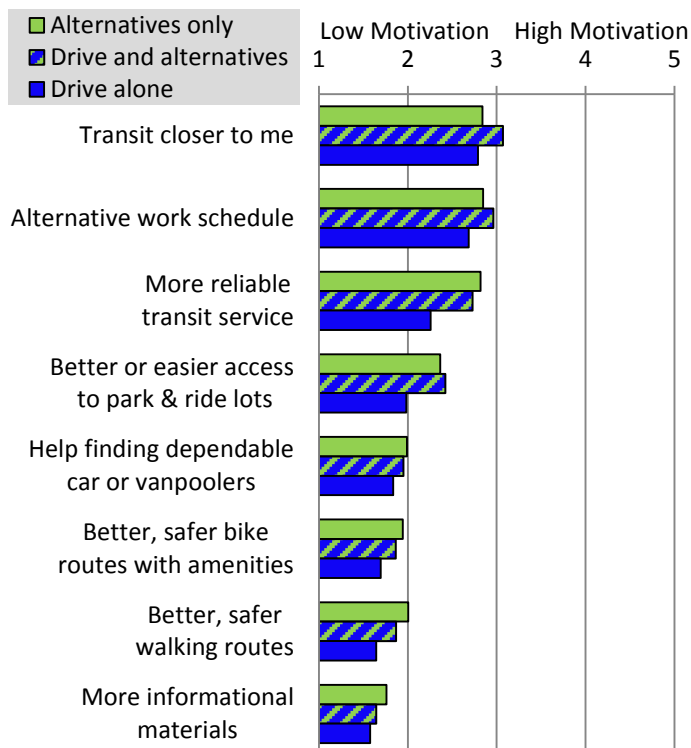


Figure 14. Motivating Power of Other Incentives

PREFERRED COMMUNICATION METHODS

Because it is important to provide commuters with information they need to understand and adopt commute alternatives, survey respondents were asked to rank their preferred communication methods for learning about commute alternatives.⁸ The three most preferred communication methods are email, through employer, and roadside signs/billboards (Figure 15).

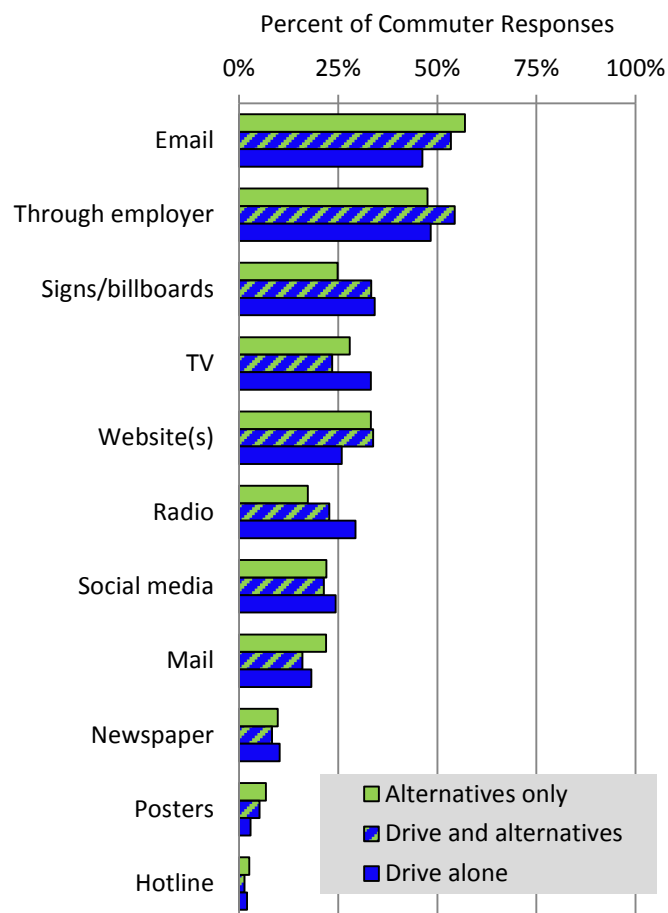


Figure 15. Preferred Communication Methods

Commuters using alternatives some or all of the time were more interested in website information sources than were drive-alone commuters. Drive-alone commuters were more likely to prefer learning about commuting via television and radio.

View a map depicting how communication preferences varied across the region at www.ghcommutes.org/?p=557.

⁸ Collecting survey responses primarily via social media and email may bias preferred communication method data.

Commuter respondents had the opportunity to share their opinion by providing a written response to the following question:

What are the key challenges the greater Houston area needs to address to improve commuting?

Forty-six percent (3,314 respondents) took the time to share their opinion. A word cloud constructed of keywords contained in written responses provides a snapshot of the key challenges identified by commuters and how these challenges might be addressed (Figure 16). The size of the word indicates how frequently commuters used the word.

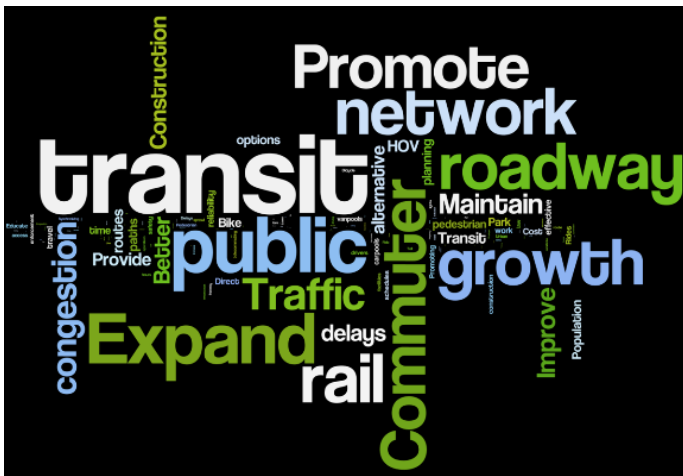


Figure 16. Key Challenges—Summary of All Responses

Ghcommutes.org contains word clouds, similar to above, that highlight how written-in responses varied by generation, satisfaction with current commute, type of road used, Spanish language response, student status, highway corridor, preference for taxpayer dollar expenditures, history in the area, travel mode, and work experience.

View more images of word clouds at
www.ghcommutes.org/category/commuter/topical/keychallenge/.

EMPLOYER FINDINGS

Employer representatives provided 213 complete and 20 usable partial responses⁹ from 61 unique employers, representing tens of thousands of commuters in the greater Houston region:

- Public, non-profit, and education sectors
 - 11 employers (172 survey responses).
 - Approximately 11,000 employees.
 - 66 percent travel during AM peak and 63 percent during PM peak travel periods.
- Private sector
 - 50 companies (61 survey responses).
 - Approximately 134,000 employees.
 - 81 percent travel during AM peak and 80 percent during PM peak travel periods.

Private-sector responses came from 11 different industries (see Table 5).

Table 5. Industry of Private-Sector Respondents

| Primary Industry | Unique Employers |
|--|------------------|
| Oil and gas, mining, extraction and support services | 14 |
| Professional, scientific, and technical services | 8 |
| Health care, medical, social assistance services | 7 |
| Manufacturing, wholesale trade | 6 |
| Construction | 4 |
| Real estate, rental and leasing | 3 |
| Finance and insurance | 2 |
| Hospitality, accommodation, and food services | 2 |
| Transportation and warehousing | 2 |
| Management of companies and enterprises | 1 |
| Retail trade | 1 |

The following page contains summary analysis of employer representative opinions regarding company practices and employee commute incentives.

⁹ An employer response was usable if it contained contact information and described the organization's current practices regarding employee commuting.

Employer Current Practice

Employer representatives described their current company practice regarding employee commutes by placing their organization into one of three groups:

- 57 percent do not currently provide employees with commute-related benefits or information.
- 23 percent provide employees with information about commute options.
- 20 percent provide employees with benefits and information about commute options.

The three most important reasons employers actively provide commuters with information and benefits are to *reduce parking demand, retain employees, and reduce employee stress.*

The three most common transportation benefits provided by companies include *transit passes or transit pass cost assistance, vanpool assistance, and carpool assistance.* About one-third of employers already allow telecommuting or teleworking for positions conducive to the practice. Half of employers allowed alternative work schedules, where feasible for the employee and job duties.

Access to Work Sites

Employer representatives were asked about the relative ease with which employees could access the work site(s) using alternative modes such as transit, biking, and walking. Responses indicate that work sites are generally accessible by transit and less so by biking or walking.

Role of Government

A majority of employer representatives (60 percent) agreed with the following statement about the role of government and non-profit entities regarding commuting in the greater Houston region:

“Government and non-profit organizations should offer programs and incentives to facilitate commuters using a commute mode other than driving alone.”

Role of Employers

A majority of respondents (65 percent) agreed with a statement about the role of employers in assisting commuters with access to and from work:

“Employers should provide programs and incentives to facilitate employees using a commute mode other than driving alone.”

Employer Interest

Employer representatives were asked to indicate who should assume responsibility to implement or encourage specific commute alternatives and incentives (Figure 17).

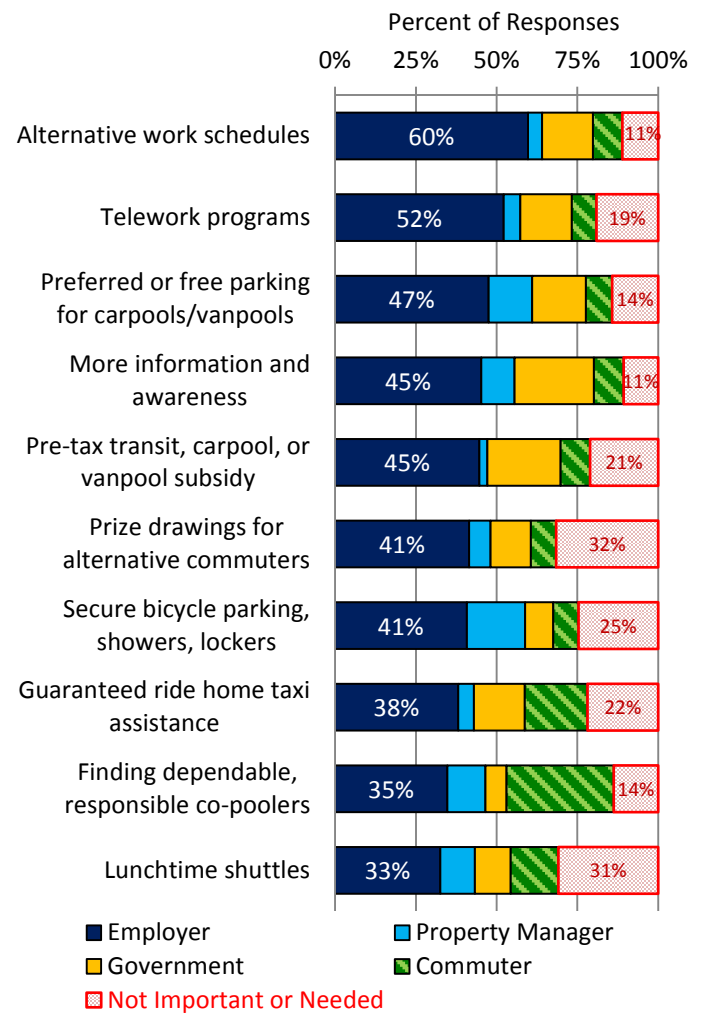


Figure 17. Lead for Alternatives and Incentives

Benefits to Region

When asked how the greater Houston region benefits when commuters travel by alternative modes and avoid driving alone, respondents ranked six benefits from most to least important as follows:

- Reduced traffic congestion (*most important*).
- Reduced family expenses.
- Improved air quality.
- Better access to jobs and education.
- Increased ability to recruit employees.
- Heightened sense of community (*least important*).

Assistance and More Information

Nine employer representatives requested that H-GAC contact them to provide assistance. The nine employers represent approximately 41,000 employed persons in the greater Houston region.

More information about employer perspectives on commuting in the greater Houston region is available by contacting TTI. Employers interested in assistance working to help employees commute may contact H-GAC Commute Solutions at www.mysolutionis.com.

GHCOMMUTES.ORG

TTI developed www.ghcommutes.org to make information and maps available to the public in a user-friendly, interactive format. The site is a logical progression of background information, study method, response details, findings, detailed analysis, and commute help resources. Figure 18 highlights the website navigation menu.

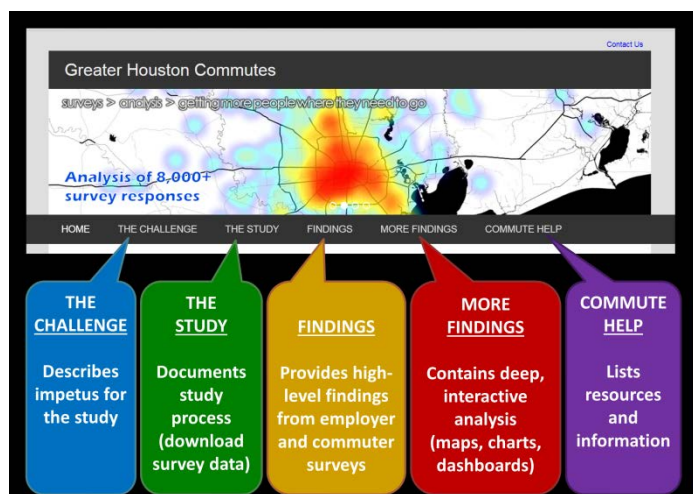


Figure 18. Diagram of GHCommutes.org Content

The following sections briefly highlight the role of each page of the website. Section titles are hyperlinks to the corresponding page online.

THE CHALLENGE

This page documents the impetus for the study in light of the region's existing congestion, current journey-to-work practices, trip purposes at peak hour, and future economic and population growth.

THE STUDY

This page summarizes the study process and provides context for findings and analysis. It specifically documents the study method, survey instrument, participation by employers and commuters, snapshot of response characteristics, survey data availability, disclaimer information, and access to public data (data available for download containing anonymized information to protect confidentiality of survey responses).

FINDINGS

This page provides a high-level summary view of findings from both employer and commuter surveys: current commute motivations, travel alternatives, roadways used, opinions, preferences, etc.

MORE FINDINGS

This page contains deeper analysis of survey responses. The research team collected an immense amount of information and created maps, tables, charts, and storyboards to highlight detailed findings.

COMMUTE HELP

This page has links to help visitors locate information and resources to aid them in commuting. It also lists resources specific to the greater Houston region.

STUDY NEXT STEPS

This study is a four-phase effort. Publication of this executive summary marks the completion of phases 1 and 2. H-GAC leads phase 3 of the study, which is to work with partner organizations to assist commuters and employers to develop incentives and utilize commute alternatives. Phase 4, in 2016, will include a follow-up survey to longitudinally measure utilization of commute alternatives and opinions. Researchers will contact the panel of 4,550 commuters who agreed to take a follow-up survey (learn more at www.ghcommutes.org/?p=565).

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Requests for additional information or analysis may also be submitted at www.ghcommutes.org/?p=255.