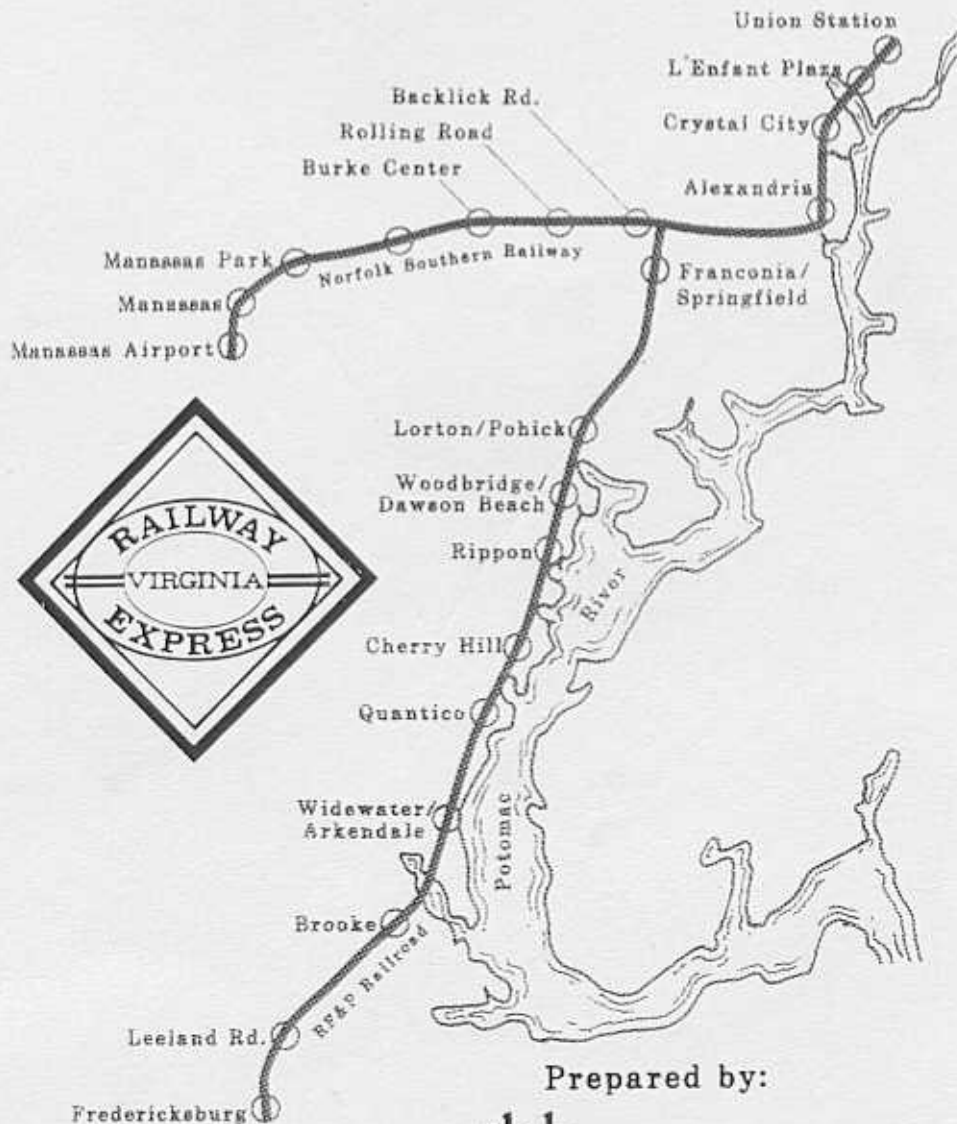


FINAL REPORT

# Attitudinal Surveys and Market Research for the Virginia Railway Express



Prepared by:

**jhk** & associates

In Association with:

Catherine Bryant & Associates  
and  
John Gobis

May 1991

# jhk & associates

---

May 27, 1991  
Project No. 1685

Mr. Randall G. Farwell  
Senior Planner  
Potomac and Rappahannock Transportation  
Commission  
12906 Occoquan Road, Suite 2  
Woodbridge, VA 22192

Re: Final Report for the VRE Market Research Study

Dear Mr. Farwell:

We are pleased to present the Final Report for our study titled Attitudinal Surveys and Market Research for the Virginia Railway Express. It represents the culmination of a variety of market research efforts, both quantitative and qualitative, and provides a comprehensive baseline of consumer information for the VRE, PRTC and NVTC.

The report consists of two volumes: 1) the Final Report containing the analysis and findings; and 2) the Technical Appendices providing the survey instruments, additional technical background, and tabulated results of the surveys. The Final Report is structured into five parts plus an Executive Summary which was prepared by PRTC.

Thank you for your support and guidance throughout this project. We have enjoyed working with you and the Study Advisory Committee.

Sincerely,

**JHK & ASSOCIATES**



Blanche B. Buergler  
Senior Associate

Enclosures

ATTITUDINAL SURVEYS AND MARKET RESEARCH  
FOR THE  
VIRGINIA RAILWAY EXPRESS

FINAL REPORT

Prepared for:

Potomac and Rappahannock Transportation Commission,  
Northern Virginia Transportation Commission,  
and Virginia Railway Express

Prepared by:

JHK & Associates, Inc.

In Association with:

Catherine Bryant & Associates, Inc.  
and  
John Gobis

May 1991

### **Acknowledgements**

JHK & Associates along with its subcontractors would like to recognize and thank the many agencies and individuals who contributed to this study. In particular the senior staff of PRTC, NVTC and VRE provided important guidance and technical assistance throughout the study. The planning staff from Prince William County, Fairfax County, WMATA and MARC provided useful information regarding area transit services. Information developed by MWCOG and RADCO was also used. JHK and its subcontractors would like to thank the Commissions and VDOT for the opportunity to conduct this market research and develop information that will facilitate operational planning and marketing for VRE commuter rail service.

### **Disclaimer**

The findings and conclusions in this report are those of JHK & Associates, Catherine Bryant & Associates, and John Gobis and not necessarily those of the Virginia Railway Express, Northern Virginia Transportation Commission, or Potomac and Rappahannock Transportation Commission.

# ATTITUDINAL SURVEYS AND MARKET RESEARCH FOR THE VRE

## TABLE OF CONTENTS

	<u>Page</u>
<b>Executive Summary</b> (Provided by PRTC) . . . . .	i
 <b>Part I - Introduction</b>	
Background and Study Objectives . . . . .	I-1
Methodology . . . . .	I-5
Report Organization . . . . .	I-7
 <b>Part II - Telephone Survey</b>	
Introduction and Statement of Objectives . . . . .	II-1
Methodology . . . . .	II-2
Burke Center/Rolling Road Stations . . . . .	II-9
Leeland Station . . . . .	II-28
Manassas Airport Station . . . . .	II-47
Woodbridge Station . . . . .	II-66
Outlier Stations . . . . .	II-85
General Service Area . . . . .	II-104
Key Findings . . . . .	II-130
Appendix II-A: Telephone Survey Questionnaires (under separate cover)	
Appendix II-B: Dial Results (under separate cover)	
Appendix II-C: Data-Weighting (under separate cover)	
Appendix II-D: Tabulated Responses from Telephone Survey (under separate cover)	
 <b>Part III - Focus Group Sessions and In-depth Interviews</b>	
Introduction and Statement of Objectives . . . . .	III-1
Methodology . . . . .	III-3
Focus Group Sessions . . . . .	III-5
In-Depth Interviews . . . . .	III-15
Appendix III-A: Discussion Guide for Focus Group Sessions (under separate cover)	
Appendix III-B: Discussion Guide for In-Depth Interviews (under separate cover)	

## TABLE OF CONTENTS (Continued)

	<u>Page</u>
<b>Part IV - On-Board Commuter Bus Survey</b>	
Introduction and Statement of Objectives . . . . .	IV-1
Methodology . . . . .	IV-2
Summary of Findings of On-Board Survey . . . . .	IV-4
Appendix III-A: On-Board Survey Questionnaire (under separate cover)	
Appendix III-B: Tabulated Responses of On-Board Bus Survey (under separate cover)	
<b>Part V - Ridership Estimation</b>	
Introduction and Statement of Objectives . . . . .	V-1
Methodology . . . . .	V-3
Estimated Ridership . . . . .	V-15
Comparison Between Estimated Ridership and VRE Market Potential . . . . .	V-17



## Executive Summary

**ATTITUDINAL SURVEYS AND MARKET RESEARCH  
FOR THE  
VIRGINIA RAILWAY EXPRESS**

**EXECUTIVE SUMMARY**

Prepared by the:

**Potomac and Rappahannock Transportation Commission**

May 1991

# Potomac and Rappahannock Transportation Commission

12906 Occoquan Road  
Suite 2  
Woodbridge, Virginia 22192

A Transportation District  
Serving 400,000 People  
(703) 490-4811  
FAX (703) 490-5254

## EXECUTIVE SUMMARY VIRGINIA RAILWAY EXPRESS ATTITUDINAL AND MARKET RESEARCH STUDY FINDINGS

### BACKGROUND

The VRE engaged the services of JHK & Associates, Inc. and that firm's subcontractors Catherine Bryant & Associates, Inc. and John Gobis to conduct attitudinal and market research related to the start of commuter rail service.

The primary objectives of the study were to:

- determine public awareness and acceptance of VRE;
- establish a profile of potential VRE patrons;
- determine customer expectations of the VRE; and
- provide data for the estimation of patronage activity at specific stations and systemwide.

The study entailed the administration of 584 telephone interviews, 1009 on-board commuter bus surveys, and a series of focus group sessions and in-depth interviews. The telephone interviews and on-board surveys constituted the collection of quantitative data. The focus group sessions and in-depth interviews elicited qualitative data.

### KEY FINDINGS

A summary of the key findings of the research follow.

Sixty-six percent of those interviewed were aware of the VRE.

Public opinion is generally positive towards VRE.

The use of general tax dollars to support the VRE is generally acceptable.

VRE as a commuting option is an attractive concept to a substantial number of residents of the service area.

Most potential riders expect the VRE running times to be less than those cited by the VRE management at the time of the study.

Proposed VRE fares are greater than potential riders anticipated.

Referencing information obtained outside of this study it appears that current actual commute time and costs by auto and other modes tend to be greater than perceived by the commuter.

Off-hour service demand exists particularly for late trains, also for weekend and holiday trains, somewhat for midday trains.

Most riders will drive and park at the station, therefore parking availability is critical.

Potential patrons would pay a nominal fee [\$1-\$2] for parking, but based on comments made by focus group participants, they would expect security and lighting for this fee.

Potential patrons stated they are most likely to write a check [56%] or use cash [24%] for monthly passes and least likely to use credit cards [20%].

If using credit cards, a Ticket Vending Machine is acceptable.

Of those stating that they are most likely to use the VRE, over half [51%] currently drive alone to work.

The data collected by way of the telephone interviews reflect that one in five persons commuting in our market area initially stated they are likely to use commuter rail. The incidence of likely users decreased to 12% after respondents were given VRE travel time and cost information.

## **RIDERSHIP**

The stated ridership may be considered to be an indicator of the potential ridership market. To determine a more realistic estimate of actual ridership, the telephone interview data was passed through a series of decision screens in the form of a LOGIT computer model. The model, in essence, applies "weights" to the components of the commuter's trip and compares the total "weight" of the commute by rail to the commuter's current mode. The

"weights" are indicators of time, cost, and convenience. If the commuter rail trip "weighs" less than the current mode, then the commuter is likely to use commuter rail. Otherwise the commuter will not. Based on this exercise, the model estimates that the mature systemwide ridership would be 4,587 morning trips. This number is consistent with the updated ridership estimate provided by Richard H. Pratt, Consultants, Inc.

## RIDER PROFILE

The potential commuter rail rider/household, based on the most frequent response, is described as follows:

36 to 64 years of age [59%];

household income of \$60,001 - \$100,000 [46%];

two adults in the household [74%];

two available vehicles per household [50%];

one commuter per household [72%];

white collar worker [63%];

61% are regular commuters;

Almost half [45%] are commuting to a location near Alexandria, Crystal City, the Pentagon, or Downtown Washington, D. C.;

Half currently drive alone to work (51%);

About twenty percent make stops related to their commute, mostly for child care or school [51%], incidental shopping [41%], banking [26%], dry cleaners [27%], and eating [18%];

Half [51%] of those questioned can set their own work hours;

About a third have adjusted their work hours because of traffic patterns;

The average commute time was one hour while the most frequently stated commute time was 45 minutes [stated travel times and costs are less than what VDOT and MWCOG travel time and AAA travel cost data indicate would be the case].

## CONCLUSION

The JHK & Associates effort provides the VRE with a base line of market information. This information will prove invaluable in setting policy and developing public informational and promotional campaigns. It is recommended that this base line be used by the VRE marketing firm in developing public informational and promotional material and as a metric with which subsequent routine and specific survey efforts can be measured to form a longitudinal VRE service "report card".