

TRANSPORTATION AND PARKING

Ride Share Analysis 2019



November 2019



RIDE SHARE Analysis 2019

This analysis is a subsection of the Transportation Census. Results are based on the 2019 survey unless noted.

1,785 respondents, selected by random sample
11 work sites
81 total possible questions
30 questions seen by each respondent on average
13 minute average completion time

Plans referenced in this document are available at:
www.ohsu.edu/transportation.

Summary of limitations

- 5% margin of error.
- Non-employee commuters not represented.
- Commuters may take multiple modes in one trip.
- Primary mode captures mode traveled farthest, not mode arriving on campus.

KEY TERMS

How terms are defined for the purpose of this report.

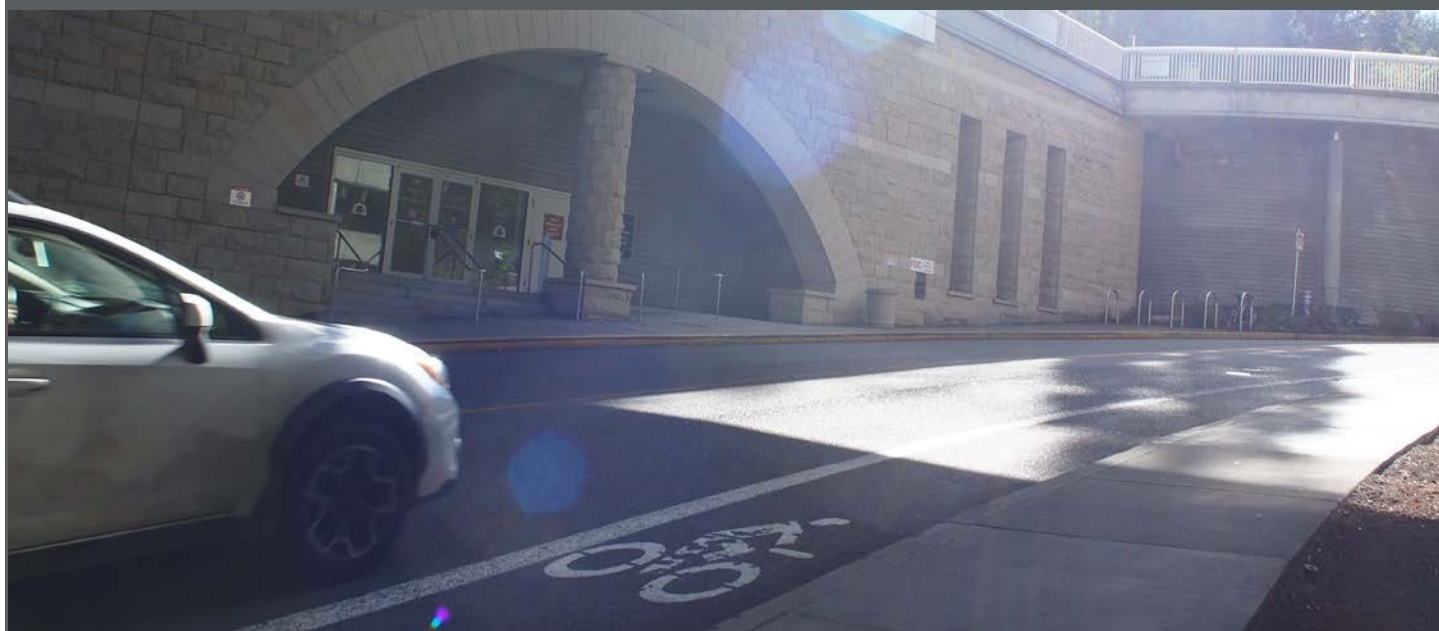
Car share: Short term rental vehicles acquired on street by the driver (example: Zipcar).

Carpool: Trip where at least two travelers in one vehicle are both traveling to a destination (example: Scoop). A Lyft with one passenger is not a carpool while a Lyft with two passengers is a carpool.


Ride share: For the purpose of this report, ride share includes both carpool and ride hail.


Ride hail: The driver does share an end destination on the route (example: Lyft).

Work site: A building or collection of buildings that can generally be considered a single commuter destination.





 **1,570 people carpool (9%)**
 **1,040 people primarily carpool (7%)**

 **544 people primarily are dropped off (3%)**
 **2,194 people are dropped off (13%)**

In total, 1 in 10 people primarily share a ride.

RECOMMENDATIONS

The analysis identified six opportunities to improve ride share access.
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NETWORK

Twice as many people want to carpool as do. NW Beaverton is a hot spot.
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PROGRAMS

OHSU factors strongly in choosing ride share and not choosing driving alone.
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LEARNING

Carpool is most popular for employees who have traveled to OHSU for over 10 years.
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EXPERIENCE

Carpools enjoy their journey more than people who drive alone. The arrival experience averages between neutral and good.
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BARRIERS

Most modes have a single strong barrier. Ride share poses many, lesser barriers.
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SECONDARY OPTIONS

Work schedule prevents people who sometimes share a ride from doing so more frequently.
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TIME

Rush hour is most popular for people who share a ride and people who want to. Night issues were uncommon.
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DAILY

Drivers mostly have long term permits and park on week days.
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Carpools increased by nearly 75% in 2019.
As a part of the total mode split, carpools increased from 4.0% to 6.9% .

OHSU employees carpool less than Portlanders generally.

Health care organizations tend to carpool less than the surrounding community, largely due to shift schedules.

If everyone who wanted to carpool did, carpooling would double.

Ride share association	respondents	percent
primarily carpools	251	5%
secondary carpool	79	2%
wants to carpool	530	11%
primarily dropped off	130	3%
dropped off secondary	281	6%
wants to be dropped off	133	3%
no carpool or drop off association	3589	72%

2019 RIDE SHARE RECOMMENDATIONS



2019 OHSU Ride Share Analysis

Outer NW is a hub with growth potential.

Ride share varies widely by neighborhood. North Beaverton in particular has demand for carpools and only a moderate count of people who actually carpool. Meanwhile, even more respondents in neighboring Bethany wanted to carpool while a significant number already did.

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Ride share is not ready for weekends.

Saturday and Sunday demand is currently low. This may mean drop off programs could pilot weekend hours without significant increases in resources but this same result is a barrier to demand-dependant programs like dynamic carpool.

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Match drivers with long term permits.

Respondents overwhelmingly reported having long term parking arrangements vs short term arrangements. Expanding the pool of drivers may necessitate moving more daily parking carpool drivers into long term parking.

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Maintain OHSU programs.

People who carpool said OHSU programs made them more likely to carpool by at a rate five times that of driving alone. People who are dropped off scored similarly.

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Upgrade parking for people who carpool.

The carpool journey experience was rated good or very good by 74% of respondents. However only 25% rated the destination experience good or great with “neutral” being the dominant response. Options to exceed expectations include new carpool parking products and dedicated space on campus.

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Focus on long time employees on the move.

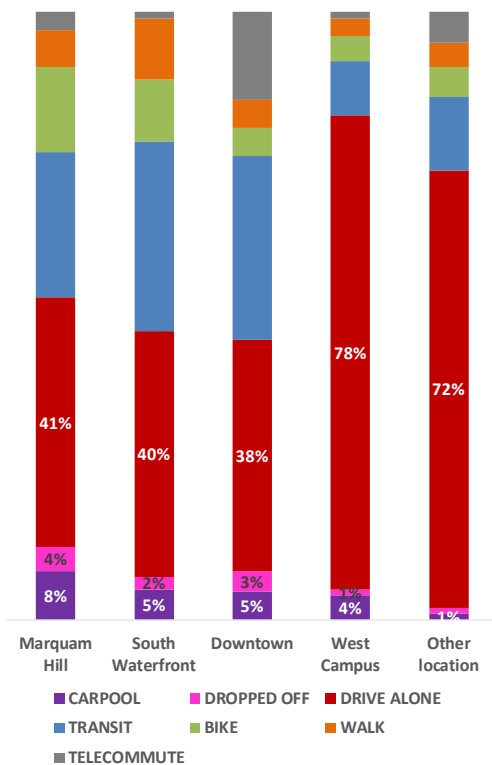
People employed at OHSU over 10 years scored highly for carpooling, as well as people with long time permits. This is the inverse of trends in transit, biking and walking. A way to catch someone when they are “starting fresh” but also a long time employee would be to market to them when they are moving to a new home address.

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See the 2019 Transportation Census for more recommendations.

RIDE SHARE NETWORK

Carpool by location
2019 Census



Neighborhoods where people want carpool or only take it sometimes are an opportunity for growth.

Carpool opportunity areas include:

- inner southwest (Multnomah Village)
- southeast (Woodstock, Sellwood)
- west of Portland (North Beaverton, Bethany)

Ride share by Zipcode 2018 to 2019

Distance	Direction	neighborhood	Zipcode	primarily dropped off	dropped off secondary	wants to be dropped off	primarily carpools	secondary carpool	wants to carpool	overall
Inner	SW	Multnomah	97219	17	19	6	20	4	19	85
Outer	NW	Bethany	97229	2	14	10	10	4	22	62
Outer	SE	Woodstock	97206	2	13	5	12	0	20	52
Inner	SE	Sellwood	97202	3	12	4	9	6	18	52
Inner	SW	Marquam Hill	97239	4	11	4	3	5	14	41
Outer	NW	Oak Hills	97006	5	9	2	9	2	13	40
Outer	SW	Hazeldale	97007	1	3	3	8	3	17	35
Outer	SW	North Beaverton	97225	2	9	2	3	2	15	33
Outer	SW	North Tigard	97223	2	6	3	9	2	10	32
Inner	SE	Goose Hollow	97201	6	9	3	5	3	4	30
Outer	N	St Johns	97203	4	5	1	6	1	12	29
Inner	SE	Buckman	97214	2	9	2	1	4	11	29
Outer	N	Kenton	97217	3	3	6	5	2	10	29
Outer	SW	South Tigard	97224	2	5	5	7	0	10	29
Inner	NE	Irvington	97212	4	6	3	6	0	10	29
Outer	SW	Bridlemile	97221	4	5	1	5	1	10	26
Outer	SW	West Lake Oswego	97035	2	4	4	7	1	8	26
Outer	NE	Alberta	97211	4	3	1	6	2	8	24
Outer	NE	Roseway	97213	1	6	4	4	1	8	24
Outer	NW	North Hillsboro	97124	0	3	2	4	4	10	23
Outer	NW	North Aloha	97003	0	6	1	2	0	13	22
Outer	SW	South Hillsboro	97123	1	4	3	3	2	9	22
Outer	SE	Oregon City	97045	2	1	2	2	1	13	21
Outer	SE	Oak Grove	97267	2	5	2	1	0	10	20
Outer	SW	Aloha	97078	1	3	3	3	1	9	20

RIDE SHARE PROGRAMS

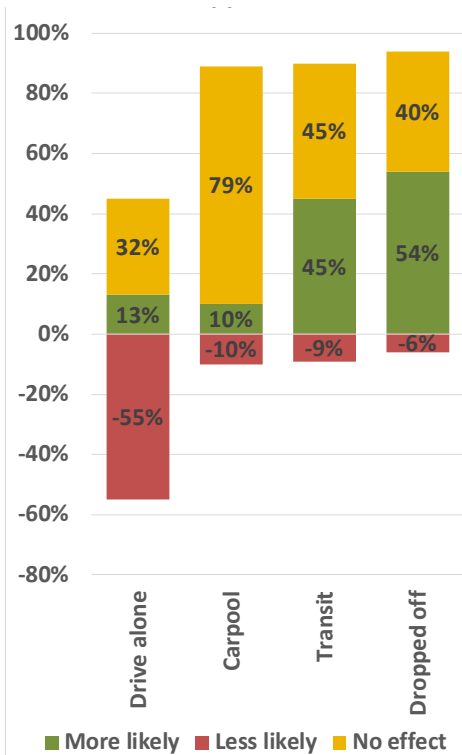


OHSU programs factors strongly in choosing ride share over driving alone.

OHSU has a variety of programs, facilities, policies, rewards and locations that may affect a commuter's use of a travel mode. People were asked if OHSU factors caused them to use the mode more, less or if OHSU had no effect.

Both groups of respondents were significantly less likely to drive alone due to OHSU factors. This is common among travel modes but particularly notable for carpool because many carpoolers have cars and permits, making

PEOPLE DROPPED OFF

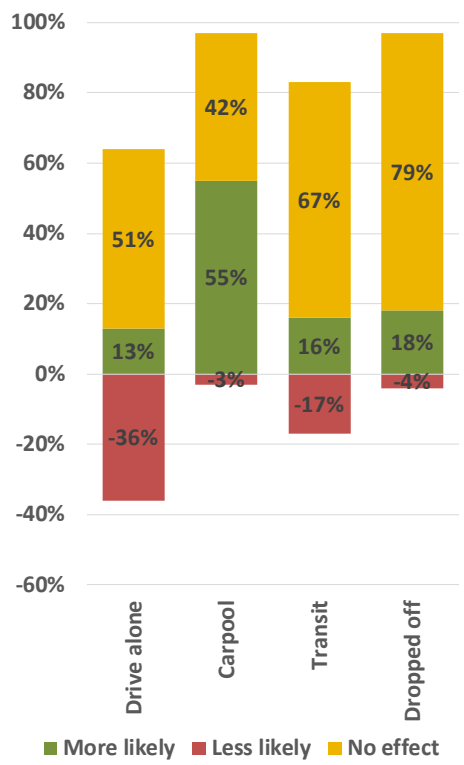


People dropped off are influenced by the transit program. People who carpool are mostly not.

45% of drop off commuters say OHSU makes them more likely to take transit. This result does not carry over to carpool commuters who appear to have a weaker relationship to transit.

Carpool commuters say they're unlikely to be recruited to non-carpool options based on OHSU factors.

PEOPLE IN CARPOOLS



LEARNING RIDE SHARE



	MARQUAM HILL		SOUTH WATERFRONT		DOWNTOWN	
When did you begin regularly commuting to OHSU?	CARPOOL	DROPPED OFF	CARPOOL	DROPPED OFF	CARPOOL	DROPPED OFF
Within the past 5 years	311	186	28	14	24	16
5 to 10 years ago	186	93	28	14	6	2
More than 10 years ago	403	124	42	14	16	16

Carpool is strongest among long time employees. This runs contrary to trends with all other options other than driving alone and telecommuting.

People in mid-career scored lowest on all ride share options. This is the demographic for which transit, biking and walking are particularly popular.

HOW PEOPLE CARPOOL

How many people are in the carpool?

88% are 2 person carpools
12% are 3 person carpools

Do you drive or ride?

36% drive
45% ride
18% frequently either

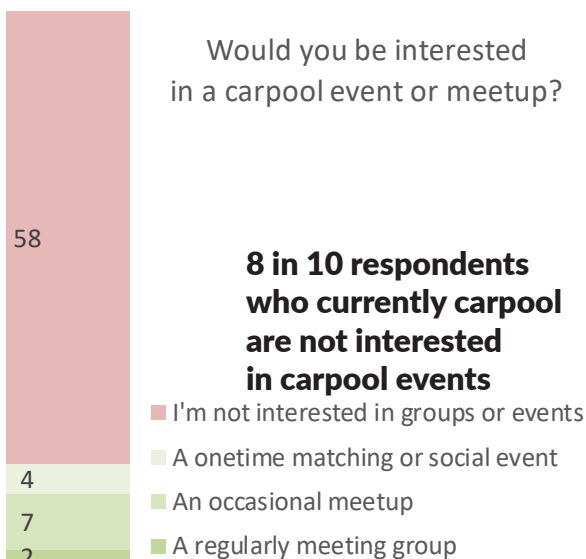
HOW PEOPLE ARE DROPPED OFF

Who drops you off?

93% personal acquaintance

55% of drivers are also commuting to work.

7% park on campus



Estimated total people equals respondents multiplied by sample weight.

EXPERIENCING RIDE SHARE



The ride share experience exceeds driving alone but still has room for improvement.

While respondents largely rated their experience between neutral and good, less than 20% of respondents gave ride share their highest rating in most regards, with the exception being the carpool journey.

People who carpool enjoy riding with others (the journey).

This is a result that may be of interest to people who drive alone and are unhappy on the journey to work.

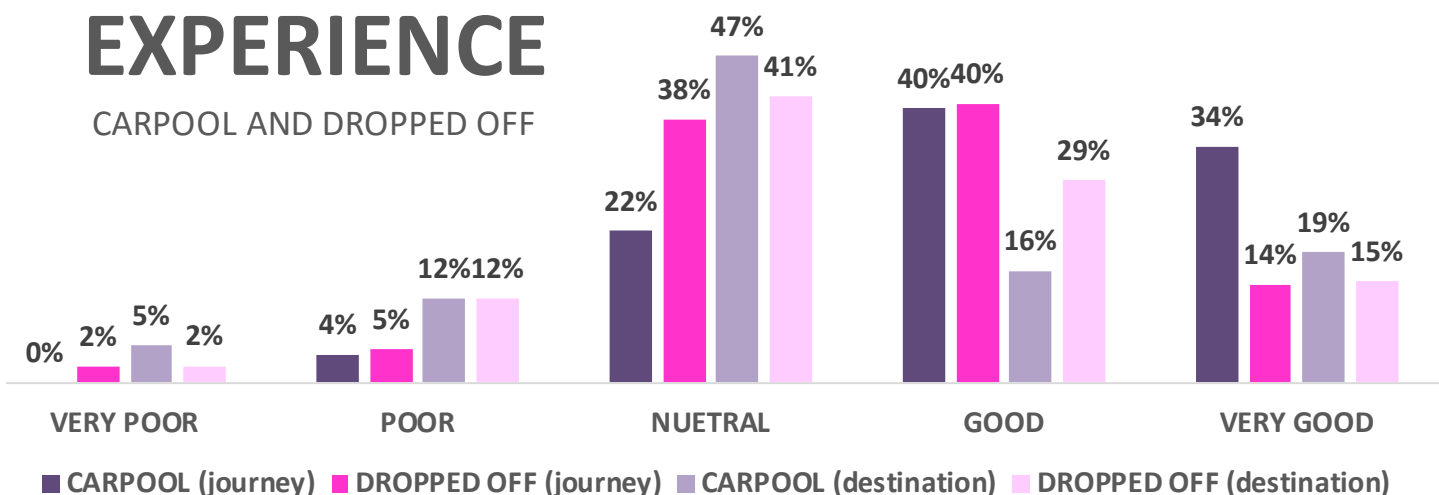
Meanwhile, the destination is both rated lower and more directly influenced by OHSU programming. Opportunities to improve the arrival experience include new parking permit products and dedicated facilities.

JOURNEY: How would you rate your experience with traveling this commute, including carpooling, traffic, street quality, and wayfinding?

DESTINATION: How would you rate your experience with end of trip facilities for this commute, including location, the facility and cost?

EXPERIENCE

CARPOOL AND DROPPED OFF



BARRIERS TO RIDE SHARE



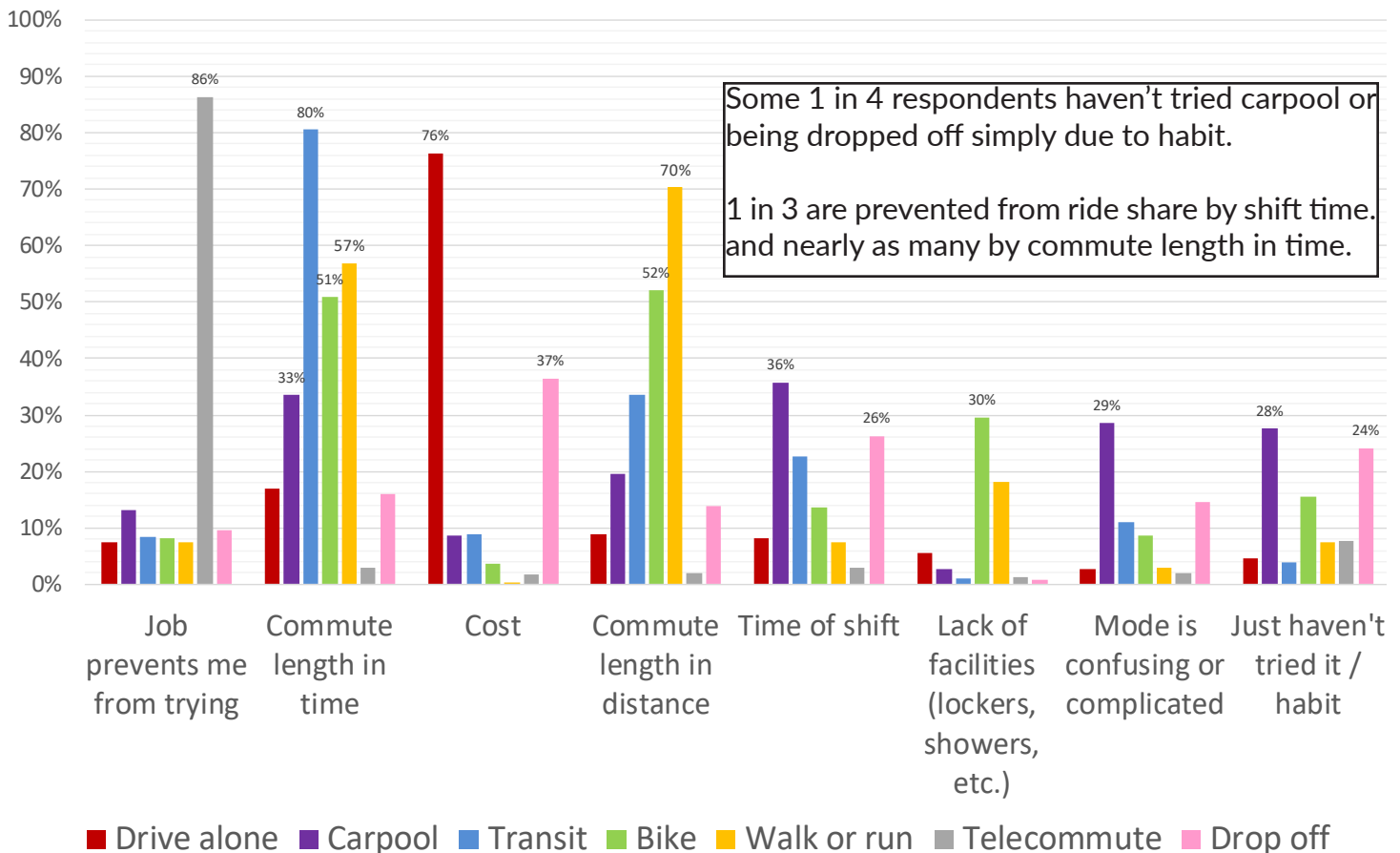
Most modes have a singular strong barrier.
Ride share poses a variety of lesser barriers.

When all census respondents were presented with a range of barriers, carpool led by time of shift, confusion/ complication, and habit with drop off close behind. However, only a third of respondents cited ride share with each specific barrier.

Each of the other travel options had at least one barrier that affected 51% of respondents and in one instance, 86% (telework and “job prevents me from trying”).

Ride share barriers have a pattern of thirds.
 Presented with any one barrier to ride share, two thirds of respondents say that barrier doesn’t affect them. Present several barriers, and ride share becomes a complex issue requiring a variety of solutions.

What prevents you from taking the following modes?



RIDE SHARE SECONDARY OPTION

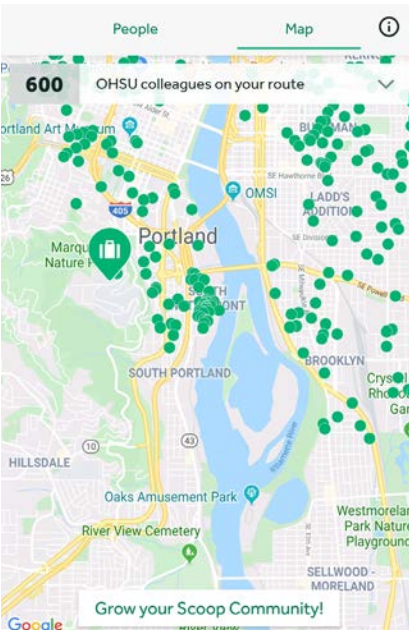
What prevents people who sometimes share a ride from sharing a ride more?

Work schedule factors strongest.

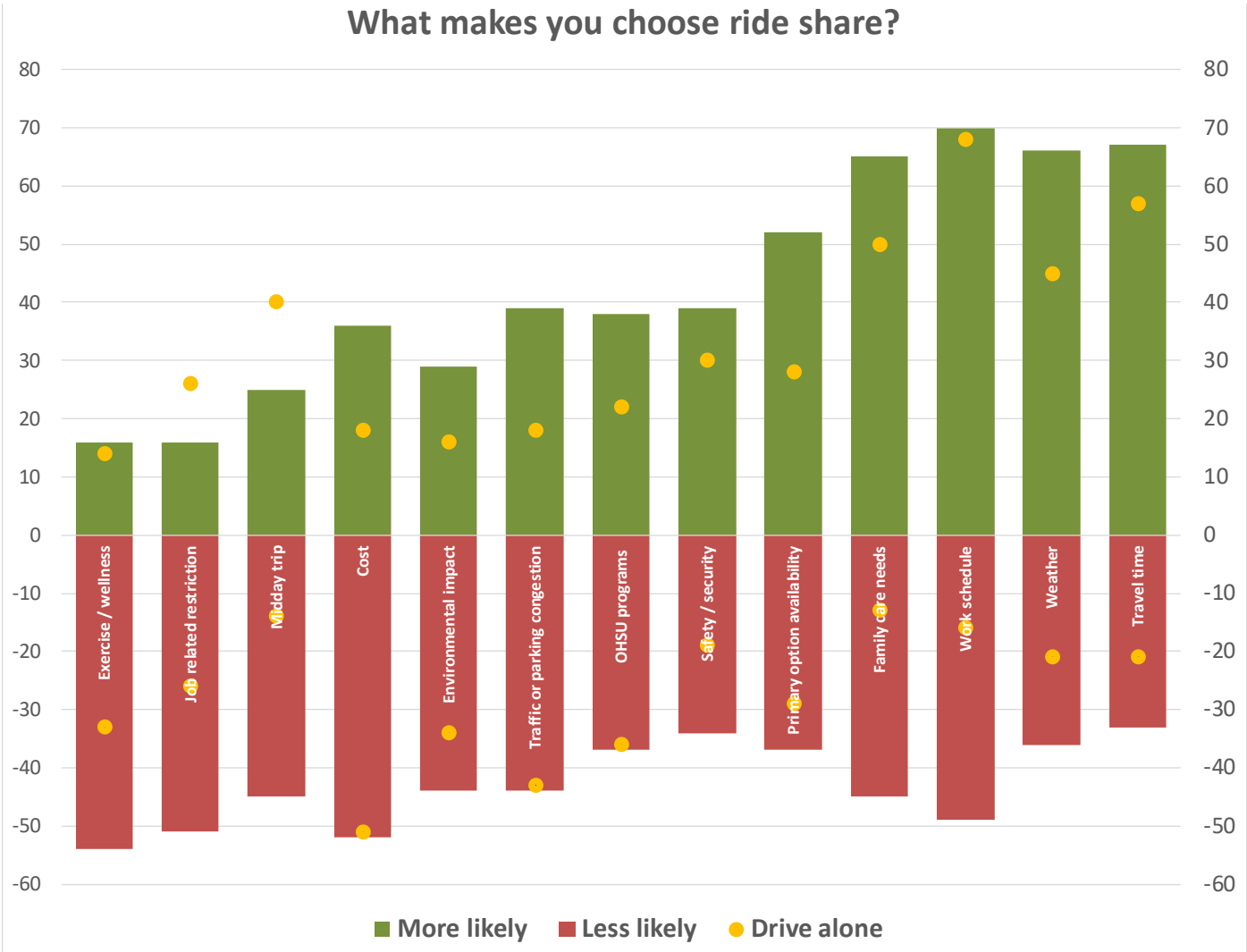
Travel time was weighted most positively between the “more likely” votes vs the “less likely” votes while exercise weighed most negatively.

People choose ride share when transit takes too long and choose to bike or run when they want to exercise.

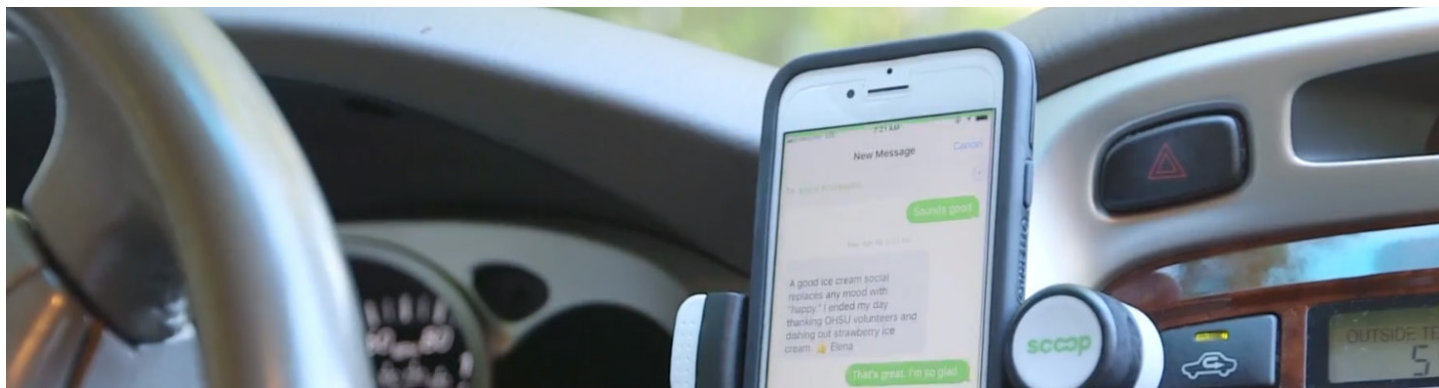
Ride share outperforms driving alone for community-centered concerns such as environmental impact and traffic or parking congestion.



What makes you choose ride share?



DAILY RIDE SHARE

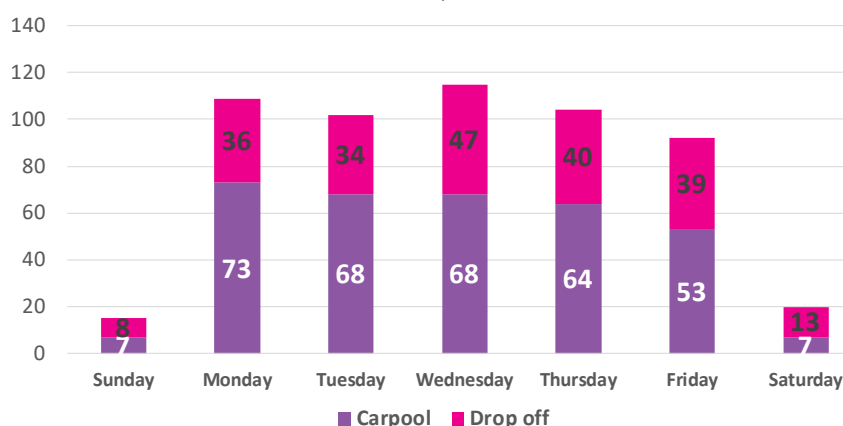


Drivers overwhelming had long term OHSU parking permits.

This supports the trend that, unlike other alternatives to driving alone, people who carpool aren't necessarily newer employees. Driving a carpool means car ownership, and optimally pre-arranged parking and a reliable schedule. All these factors favor long time employees over new employees.

Carpools and Drop offs by day

May 2019
Actual respondents



Ride share demand is relatively steady across weekdays yet minimal on weekends.

The below chart combines the previous two years of data. The far left column represents people who cite ride share as their overall primary or secondary mode or simply want more access to ride share. The bottom break out is the mode people cited that specific day of census.

CARPOOL DRIVERS

How do you handle parking?	Respondents
I have or split the cost of an OHSU long term single driver permit.	14
I have or split the cost of an OHSU long term carpool permit.	10
I have non-OHSU parking.	7
Other (5 West Campus, 1 overnight).	6
I purchase or split an OHSU day pass.	3
I do not handle or share the cost of parking.	2

Week of census (2018, 2019)	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
dropped off some of the time	8	57	62	62	59	52	13	3	59	60	60	57	48	3	3	27	22	22	25	20	0	0	14	11	14	13	16	5
carpools some of the time	7	48	47	56	51	51	11	0	36	45	38	35	34	2	4	25	23	20	18	16	3	2	1	0	2	2	1	2
wants ride share	34	198	211	204	205	194	41	1	70	80	84	81	73	3	3	40	44	45	38	32	5	6	19	22	25	24	19	7
Primary mode by census day	Drove alone							Transit							Carpool							Dropped off						

This chart combines 2018 and 2019 data and represents total respondents.

RIDE SHARE BY TIME

	dropped off - start	dropped off - end	carpool - start	carpool - end	wants ride share - start	wants ride share - end
12:00 AM	0	0	0	0	0	2
12:30 AM	0	0	0	0	0	0
1:00 AM	0	0	0	0	0	0
1:30 AM	0	0	0	0	0	0
2:00 AM	0	0	0	0	0	0
2:30 AM	0	0	0	0	0	0
3:00 AM	0	0	0	0	0	1
3:30 AM	0	0	0	0	0	1
4:00 AM	0	0	0	0	1	1
4:30 AM	0	0	0	0	0	1
5:00 AM	1	0	1	0	3	1
5:30 AM	0	0	1	0	2	0
6:00 AM	14	1	12	0	17	0
6:30 AM	10	0	7	0	15	0
7:00 AM	28	2	24	0	74	1
7:30 AM	20	5	18	3	74	5
8:00 AM	59	0	38	0	113	0
8:30 AM	16	0	12	0	57	1
9:00 AM	22	0	13	0	44	1
9:30 AM	4	0	3	0	6	0
10:00 AM	2	0	0	0	5	0
10:30 AM	0	0	0	0	2	0
11:00 AM	1	0	0	0	3	0
11:30 AM	1	0	0	0	0	0
12:00 PM	1	0	0	0	0	1
12:30 PM	0	0	0	0	0	0
1:00 PM	0	1	0	0	0	1
1:30 PM	0	1	0	2	0	1
2:00 PM	0	1	0	0	1	2
2:30 PM	0	9	0	10	1	8
3:00 PM	1	5	2	7	3	10
3:30 PM	0	13	0	5	2	39
4:00 PM	0	21	0	16	1	69
4:30 PM	0	24	0	24	0	58
5:00 PM	0	41	0	36	0	102
5:30 PM	0	21	0	8	0	47
6:00 PM	0	15	0	11	0	31
6:30 PM	1	6	0	0	0	13
7:00 PM	6	8	4	5	4	12
7:30 PM	0	6	0	6	0	11
8:00 PM	0	2	0	1	1	4
8:30 PM	0	3	0	0	0	1
9:00 PM	0	1	0	0	2	0
9:30 PM	0	0	0	0	1	1
10:00 PM	0	0	0	0	0	1
10:30 PM	0	0	0	0	1	1
11:00 PM	0	0	0	1	0	2
11:30 PM	0	1	0	0	0	3
Total	187	187	135	135	433	433

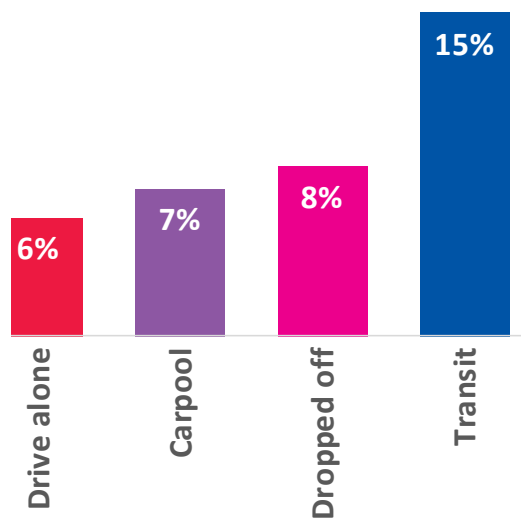
Rush hour is popular for all categories: Drop offs, carpool and people who want either.

The people who want to use ride share primarily start at 7am to 9am and end shift at 3:30 to 7:30pm.

The end of shift was more spread out than the start of shift.

The people dropped off were overwhelming receiving a ride from a personal acquaintance, not a ride share company.

Have you experienced problems getting to your primary work site between the hours of 9pm and 6am?



Ride share respondents report night access issues at half the rate of transit riders.

This probably speaks to the success of Lyft Off. Transit riders continue to experience issues at nearly double the rate of ride share users.

Night access to transit will have to be improved to maintain transit ridership in the evening and early morning.

Respondents who primarily use ride share reported slightly more night access issues than people who drive alone.



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