



2008 Baltimore Regional Transportation Survey

Residential and Business

November 25, 2008



Baltimore Metropolitan Council



Background

- Measure Baltimore area transportation habits and business practices in response to rising energy prices
- Gauge opinions on environmental concerns.



Methodology

- WB&A Market Research conducted a study among residents and business leaders in the Baltimore area:
 - 400 interviews conducted among Baltimore residents
 - average of 8 minutes.
 - total sample size of 400 with a maximum sampling error of ± 4.9 percentage points at the 95% confidence level.
 - 100 interviews among Baltimore business leaders
 - average of 11 minutes.
 - total sample size of 100 with a maximum sampling error of ± 9.8 percentage points at the 95% confidence level.
- Interviews conducted by professional interviewers between September 12th, until September 24th 2008.



Resident Screening Criteria

- Resident respondents were screened to ensure the following:
 - At least 18 years of age
 - Live in the Baltimore region
 - Quotas ensured a representative number of respondents from each county or jurisdiction, as well as a reasonably even number of male and female respondents



Business Screening Criteria

Business respondents were screened to ensure the following:

- Operate in the Baltimore region
- At least share in the decision making of the company - CEO, CFO, COO, president, executive vice president, senior vice president, vice president, or owner/proprietor



Key Findings - Residents

- Gas price increases caused many residents to change their behavior:
 - \$3.00 per gallon threshold
 - Combine and reduce trips
 - Reduce the number of days commuting
 - Consider purchasing more fuel efficient vehicles and use public transportation more often



Key Findings - Residents

- Primarily car users
 - 91% for personal trips
 - 87% for commuting.
- About one in ten use public transportation
 - 11% for commuting
 - 7% for personal trips



Key Findings - Residents

- 72% said that gas price increases have impacted their local travel:
 - combine trips/errands (41%) and to reduce vacations and pleasure trips (31%).
- **Among those impacted**, three in ten (30%) affected once gas prices reached \$3.00 per gallon and almost 20% at the \$3.50 per gallon price point
 - 11 % consider returning to previous travel habits once gas prices fall below \$3.25 per gallon, with 25% migrating back after prices fall below \$2.50 per gallon.
- More than one-third of those who commute (36%) said they had or would consider reducing the number of days they commute, and 27% had or are considering telecommuting.
- One-third of all residents (33%) have or are considering purchasing a more fuel efficient vehicle, and about two in ten (21%) may use public transportation more often in the future.



Key Findings - Business

- Recent increases in energy costs have impacted area businesses:
 - Passing costs on to customers
 - Additional measures either have been taken or are being considered by at least some businesses



Key Findings - Business

- Almost six in ten (57%) have already changed the way they are doing business due to higher energy costs.
- About six in ten (58%) have and/or will be forced to pass increased costs onto customers - most (47%) have already done so.
- Other measures already taking place or being considered:
 - Refraining from hiring/increasing workforce (41%),
 - Managing vehicles differently (36%),
 - Downsizing their workforce (35%), and/or
 - Adjusting work schedules (32%).
- Furthermore, 7% of businesses interviewed said they are considering closing some or all of their locations.



Key Findings - Business

- While higher gas prices have not had a great impact on the majority of businesses' employees, at least according to the executives interviewed, at least two in ten said that it has had at least a moderate impact on employee morale (49%) and/or the number of hours employees work per week (20%).



Climate Change

- One in eight area residents (12%) are familiar with climate change and/or global warming, believe it is real, believe human behavior is a primary cause and are willing to change their behavior.
- About one in ten businesses (11%) are willing to consider changing their behavior in order to help reverse climate change.



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- Final report available at www.baltometro.org – featured links



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