Washington State Joint Transportation Committee

Nondrivers: Population, Demographics, and Analysis

JTC Presentation
December 15, 2022

Presentation Overview

- Project Background & Approach
- Nondriver Population Data Estimates
- Statewide Survey – Market Research
- Transportation Options Analysis
- Findings Summary
- Next Steps

TOOLE DESIGN

Project Team

- Consultant Team
  - Toole Design Group
  - Cascadia Consulting Group
  - Strategic Research Associates
- JTC Staff Workgroup
  - Barb Chamberlain, Director Active Transportation Division, WSDOT
  - Don Chartock, Deputy Director Public Transportation Division, WSDOT
  - Senate Transportation Committee staff, Jenna Forty
  - House Transportation Committee staff, Michael Hirsch
  - JTC staff, Paul Neal and Alyson Cummings (project manager)

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Project Background

- The Washington (WA) State Legislature directed the Joint Transportation Committee (JTC) to conduct a study to estimate how many nondrivers are in Washington State and the demographics of this population, as well as identify the availability of transportation options for nondrivers and the impact those options have on access to daily life activities.
  - **Estimate the nondriver population**: conduct research to quantify the nondriver population in Washington State.
  - **Identify the demographics**: utilizing a statewide survey, collect demographic information and people's reasons for not driving.
  - **Analyze available transportation for nondrivers**: identify how current transportation infrastructure and services serve nondrivers, and how that service meets people's needs for access to economic opportunity, recreation, education, and other aspects of community life.

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Project Approach

- Three main parts or steps:
  - Using available Census and FHWA/DOL data, identify the different population groups that make up the nondrivers in Washington State
  - Identify the demographics and mobility needs of surveyed nondrivers in Washington State through a statistically significant market research survey
  - Analyze the availability of transportation options, and the impact those options have on nondrivers' access to daily life activities
- Product:
  - Summary Report and Appendices
  - Publicly available interactive map and database

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Estimate the Nondriver Population Using Existing Data

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Nondriver Population Groups

- Three groups of nondrivers:
  - Individuals too young to get a license (under 16)
  - Individuals aged 16 and over without a license
  - Licensed drivers that do not own/lease a vehicle
    - May have shared access to a vehicle

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Population Eligible for a License

- 7.7 million residents in Washington State
- 6.3 million age eligible for a license [1]
  - ~1.4 million residents are under age 16 and too young to drive/prohibited from driving, this is approximately 18.4% of the state's population
- 5.8 million licensed drivers [2]

Driving Age Groups	Driving Age Population	Total Licensed Drivers	Percent of Age Group Licensed
Minors (15 to 19)	459,615	201,289	43.8%
Young Adults (20 to 34)	1,670,367	1,514,391	90.7%
Adults (35 to 64)	2,966,710	2,940,724	99.1%
Seniors (65 and over)	1,190,392	1,156,096	97.1%
Subtotal	**6,287,084**	**5,812,500**	**92.5%**

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[1] Source: U.S. Census 2020 data (includes 15 years old and over, as reported by the Census)
[2] Source: FHWA & DOL (includes restricted and graduated licenses of drivers 15 years old and over)

Nondrivers Age 15+: Population Estimate Utilizing Existing Data

Nondriver Population Groups, Age 15+	Nondriver Population	Percent of Total Population
Do not have a driver's license	474,584	6.2%
Do not have a vehicle [3]	401,453	5.2%
Population Range	**474,584 – 876,037**	**6.2% - 11.4%**

Data limitations:

- Some do not have a car and do not have a driver's license. This produces an overlap between categories that cannot be identified with existing data. Therefore, the number of non-drivers 15+ is expressed as a range.
- Some households with vehicles have more licensed drivers than vehicles. Some of those licensed drivers may not have access to a vehicle. That number cannot be quantified with the available data.
- This data does not capture those who have a license and a car but are no longer able to drive.

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[3] Estimate of age-eligible drivers that belong to zero-vehicle households, based on U.S. Census Bureau ACS 5-Year Estimates 2016-2020 data for zero-vehicle households, household size, and driving-age population.

Market Research – Statewide Survey

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Market Research – Statewide Survey Goals

Gather state-wide information from Washington nondrivers ages 18 and over about their demographics and available transportation options.

- **Demographics:** Who are the nondrivers age 18 and older in Washington State?
- **Reasons:** What are the reasons for not driving?
- **Mobility & Access:** What is the usability of travel options and accessibility to activities?
- **Impact:** What is the impact of travel access?

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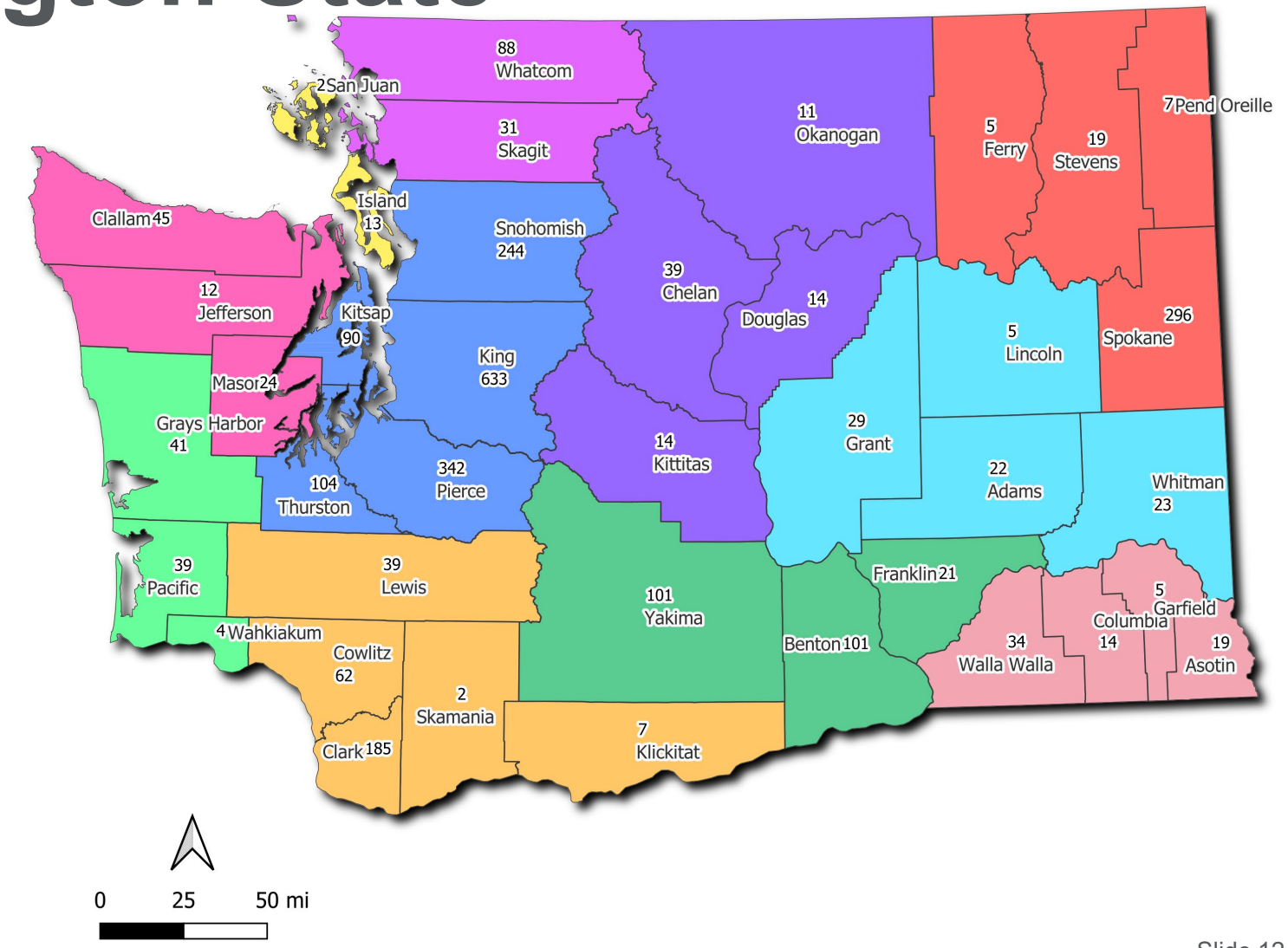
Survey respondents: Nondrivers 18+ across Washington State

- 2,786 Responses
  - Phone (76)
  - Online (2,710)
- Balance:
  - Urban: **3.4** respondents for every **10,000**
  - Rural: **4.4** for every **10,000**



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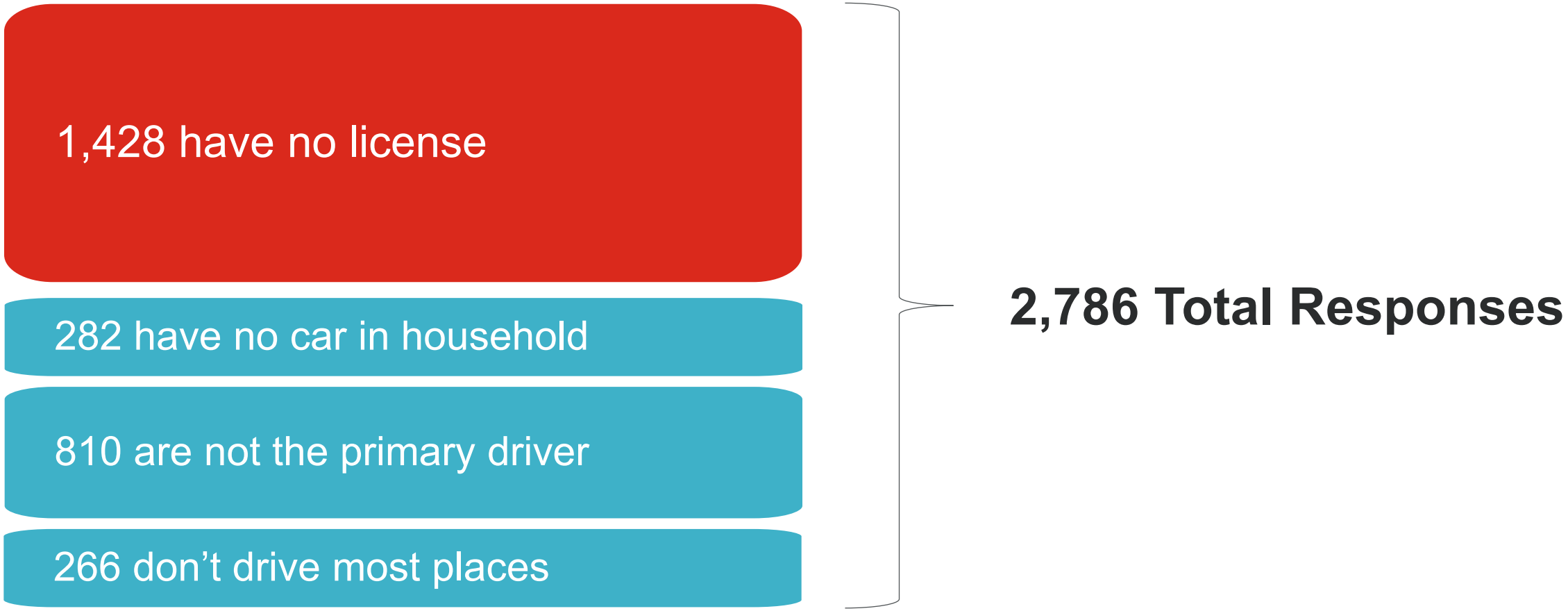
Half of survey respondents that identified as nondrivers reported they did not have a license



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Survey Demographics: Who are the nondrivers age 18+ in Washington State?

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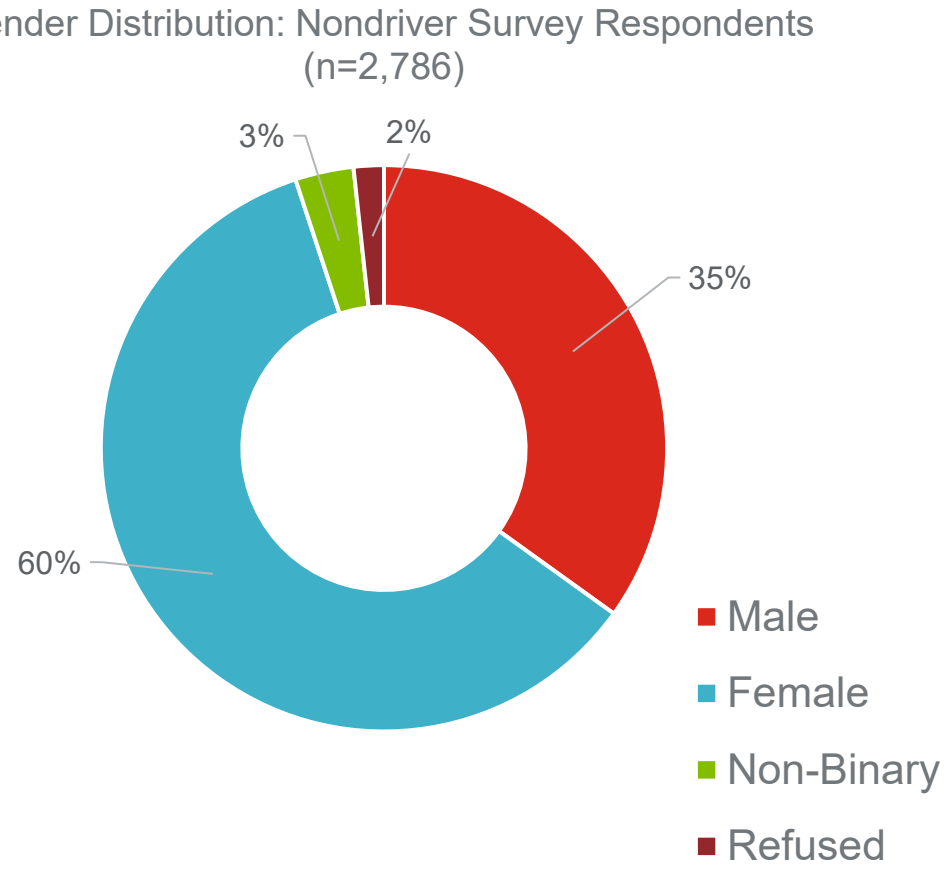
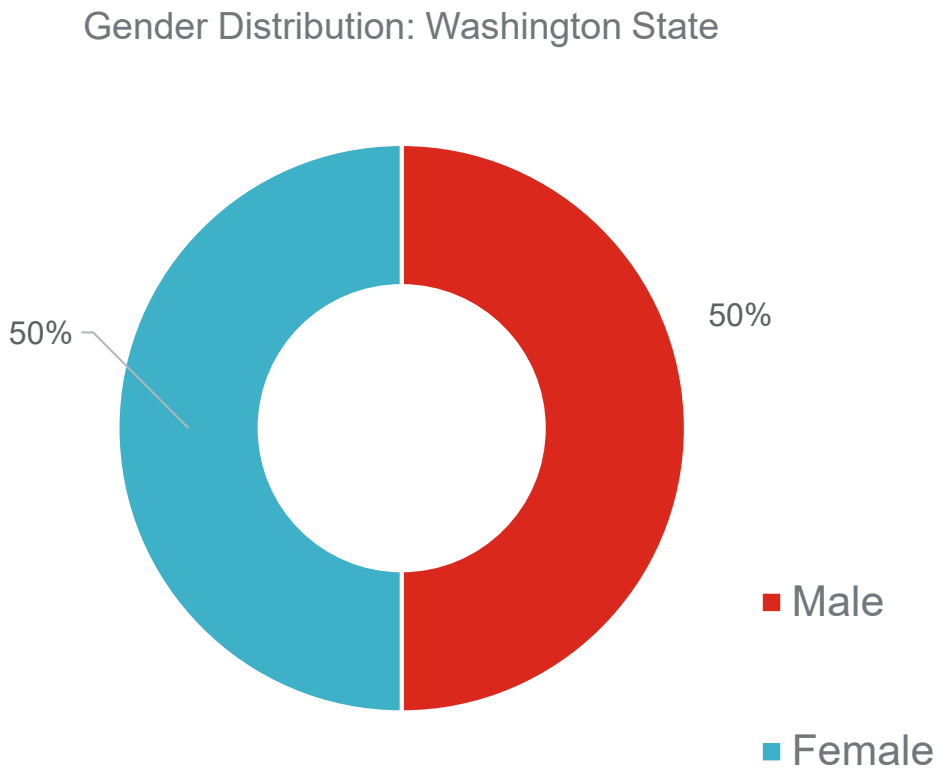
Survey respondents were more likely to be female than male





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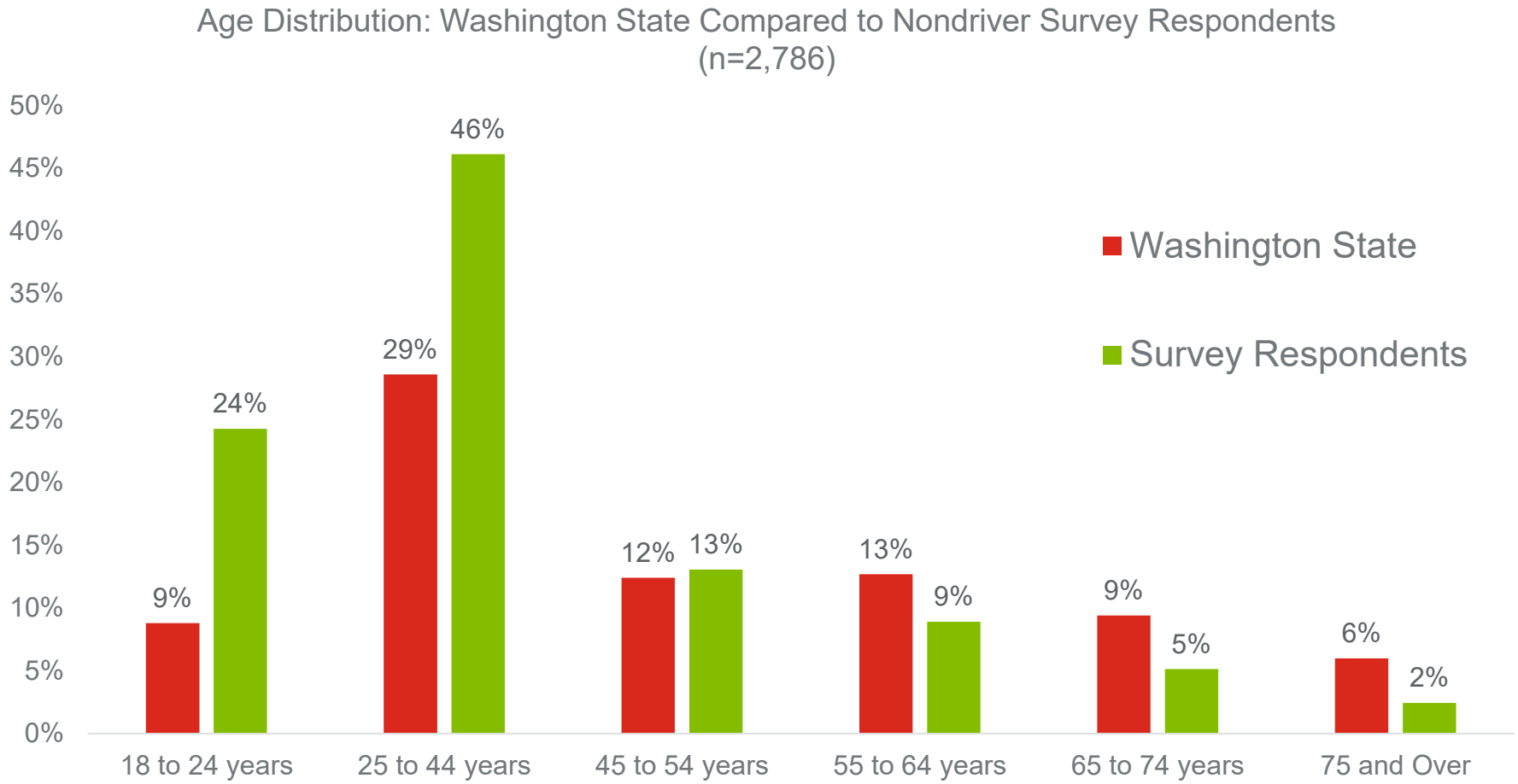
Survey respondents: 70% were age 18-44



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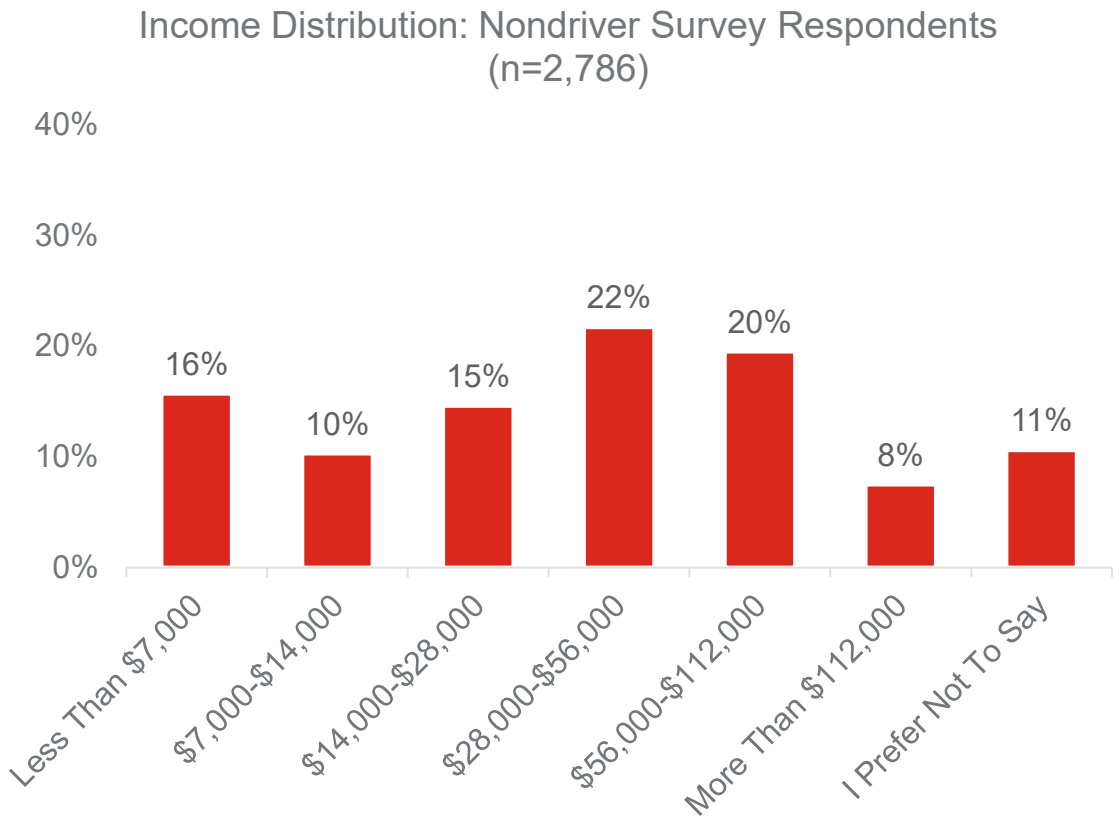
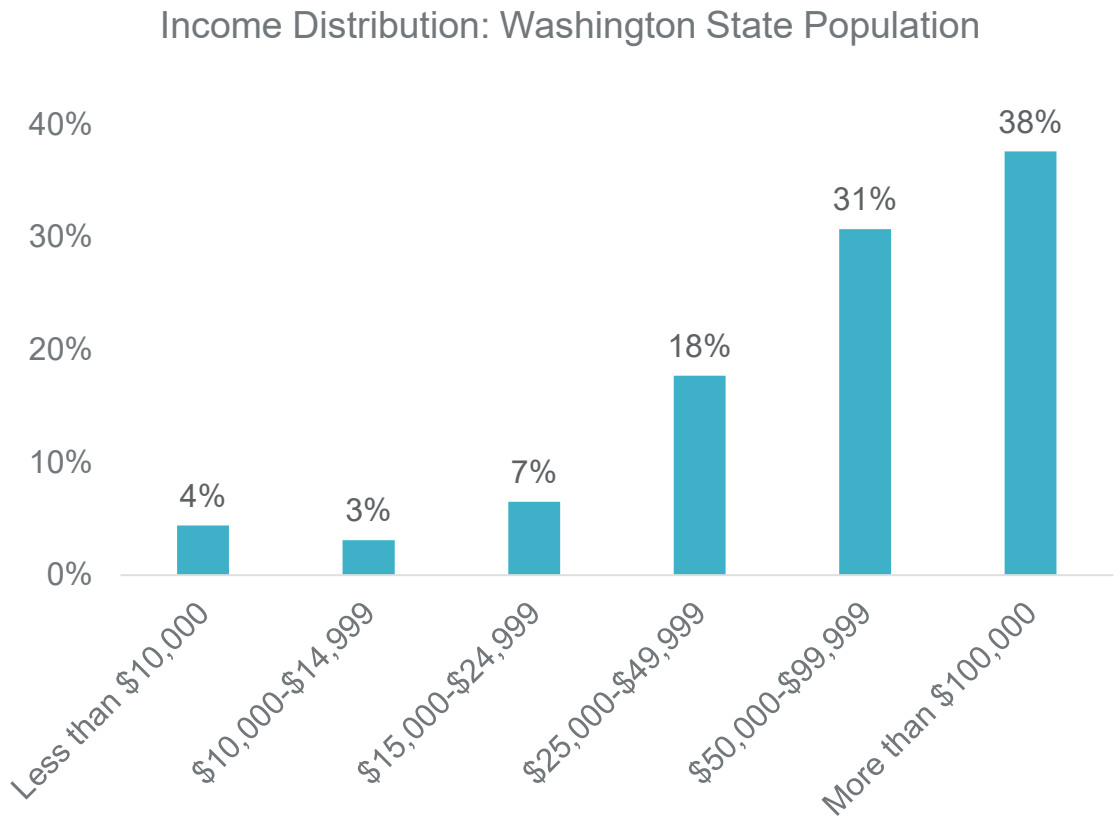
Survey respondents: Nondrivers age 18+ tend to be lower income than the overall state population





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Surveyed Reasons: What are your reasons for not driving?

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Survey Respondents: Reasons for Not Driving

- Which of the following best describes your reason for not driving?
  - 2,786 Nondriver Survey Responses

40%	Cost of purchasing, operating, & maintaining a vehicle are too high
28%	Cost of vehicle registration and/or insurance are too high
18%	Disability or condition that prevents or limits driving
17%	Prefer a lifestyle without a car
14%	Doesn't know how to drive and/or the costs of obtaining a driver's license are too high
17%	Other (no/suspended license, partner uses car, fear/anxiety, and others)
9%	I prefer not to say

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Surveyed Mobility & Access: What is the usability of travel options and accessibility to activities?

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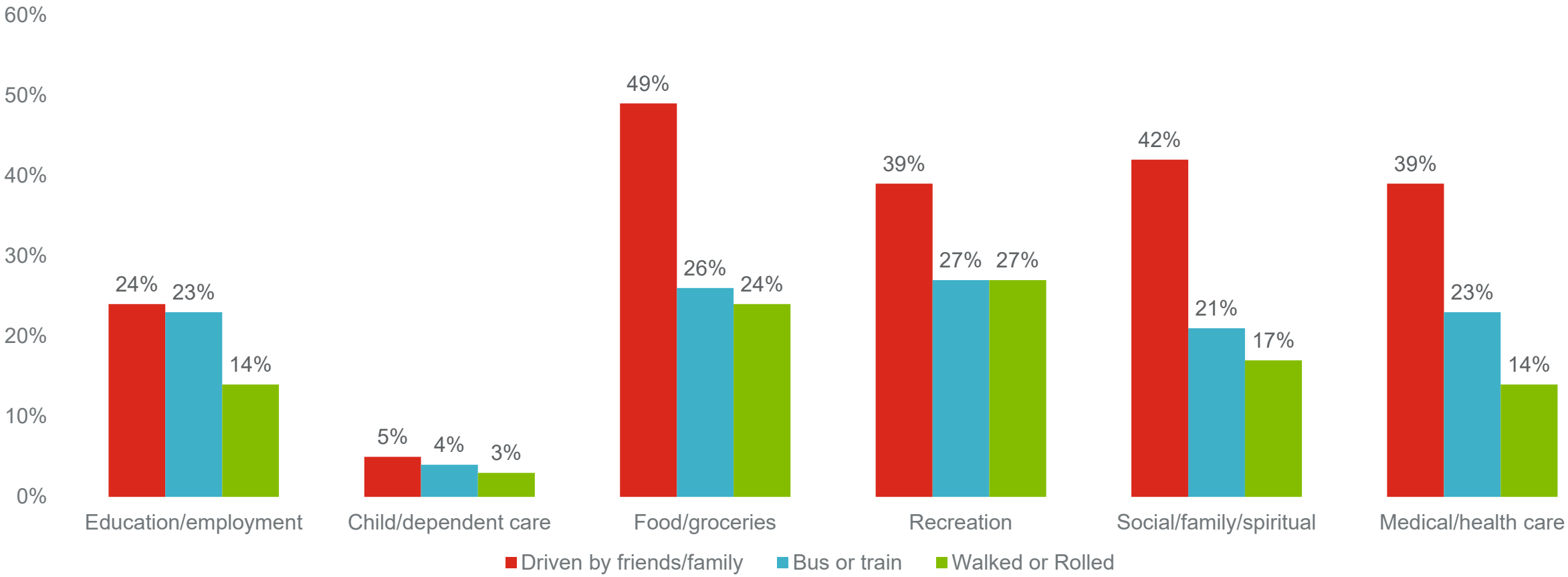
Survey respondents said they are most often driven by friends or family to get to places



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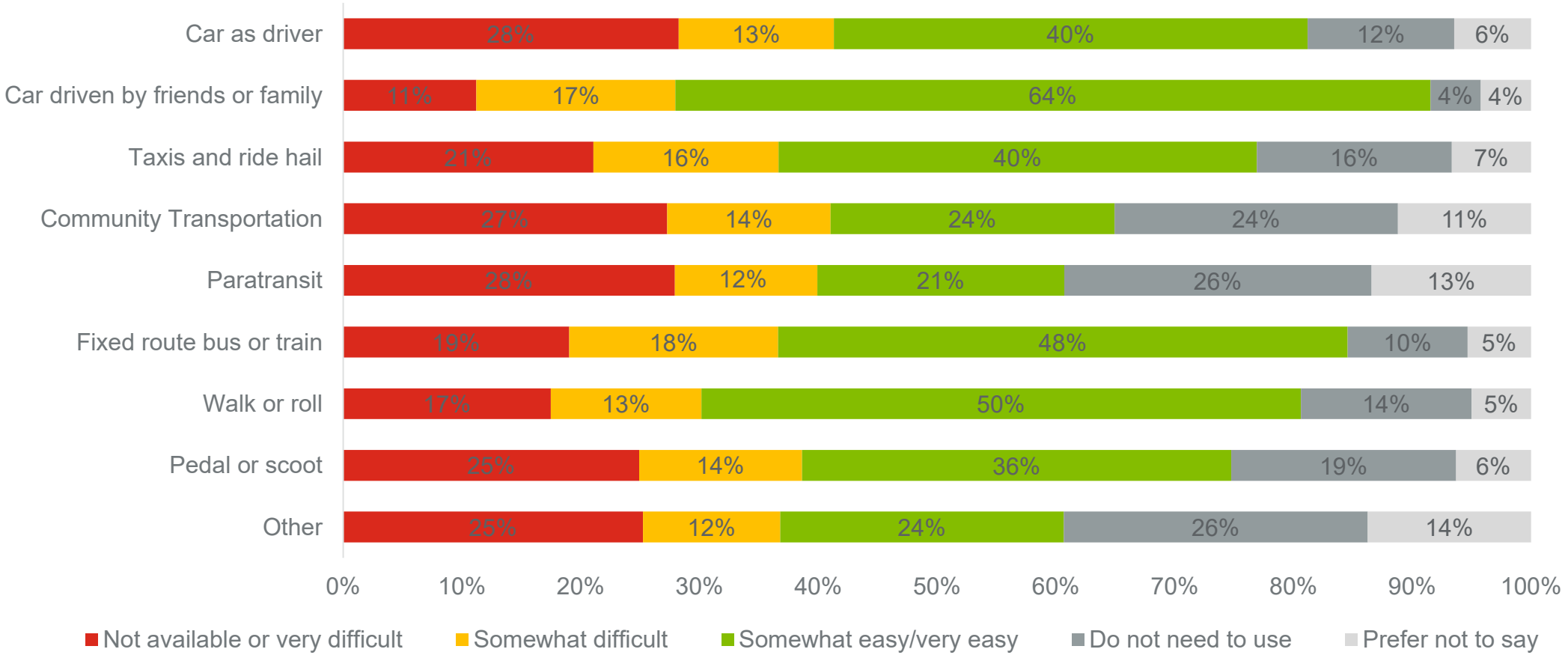
Survey respondents indicated that a vehicle driven by friends/family, walk/roll, bus/train are easiest modes to use



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Surveyed Impact: What is the impact of travel access?

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Survey respondents: reported negative impacts to their travel behavior and access to life opportunities

- Over **70%** of surveyed nondrivers had travel plans negatively impacted **at least one time** in the **past 30 days**.
- This negative impact is defined as at least once a week or more often:
  - **23%** of surveyed nondrivers will skip going somewhere because of transportation
  - **22%** will be late when not driving
  - **34%** percent worry about being able to get somewhere
  - **39%** worry about inconveniencing friends and family

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Market Research Statewide Survey Findings (ages 18+)

- ✓ Nondriver survey respondents were more likely to be female, younger, lower income, and from a larger-size household
- ✓ Nondriver survey respondents have different reasons for not driving and different travel behaviors
- ✓ Nondrivers survey respondents' access to life opportunities and quality of life is impacted by their status as a nondriver and available transportation options
- ✓ There are demographic differences between nondriver survey respondents in how they are impacted by their nondriver status.
- ✓ Those living in rural areas, females, lower income, disabled, and younger respondents tended to be more impacted by their nondriver status across the different questions than other respondents.

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Analysis of Impact of Transportation Options

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Analysis Goals

- High level understanding of locations of services and facilities for daily life activities [4]
  - Healthcare
  - Food & Groceries
  - Employment
  - Education
  - Recreation
  - Other aspects of community life

- High level expert assessment of differences in access by mode of transportation
  - Driving a car [5]
  - Walking
  - Riding a Bike
  - Public Transit [6]

[4] Daily life activities were mapped and quantified by census block group from U.S. Census Bureau and Open Street Map data. Employment data was quantified by NAICS group from Longitudinal Employment Household Dynamics (LEHD) data.

[5] The access by mode of transportation analysis estimated the number of people within a market shed of 15, 30, and 60 minutes away from each daily life activity or travel destination group. The market shed was calculated as the straight distance that can be traveled in 15, 30, and 60 minutes, using average speeds. This method was used to estimate the market shed for driving a car, walking and biking.

[6] The market shed for public transit was calculated using the network of fixed-route bus services that is available throughout the state, from GTFS data for all 32 public agencies in the state and selected tribal transit organizations.

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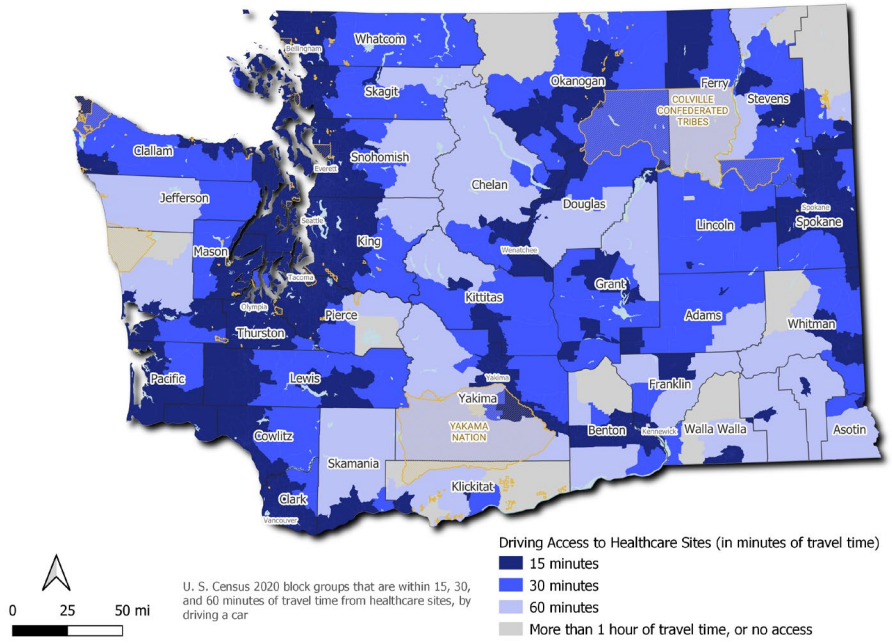
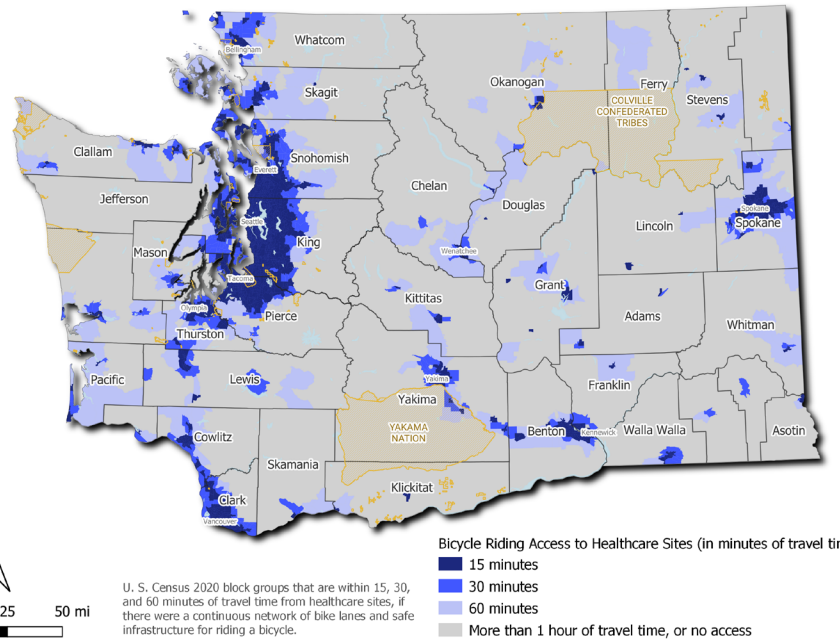
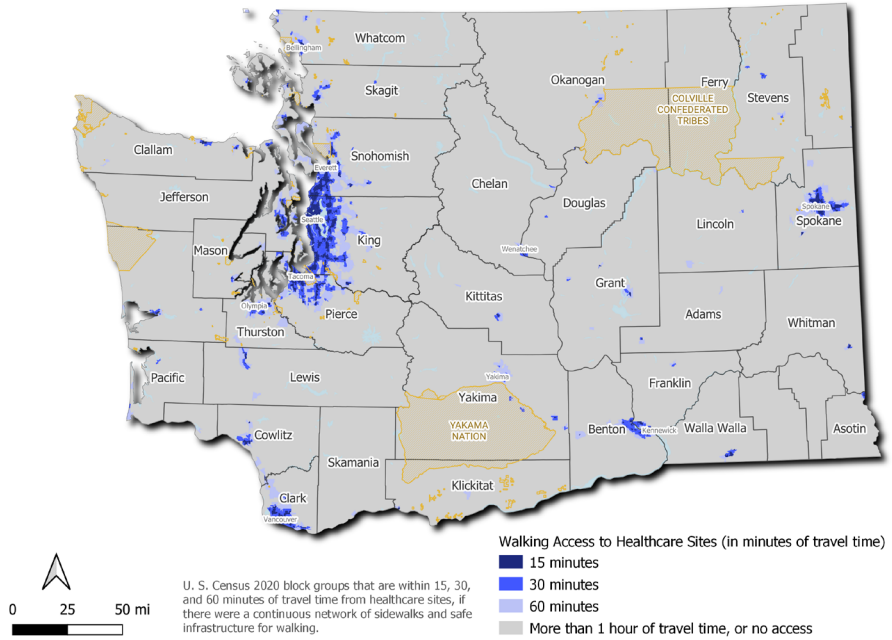
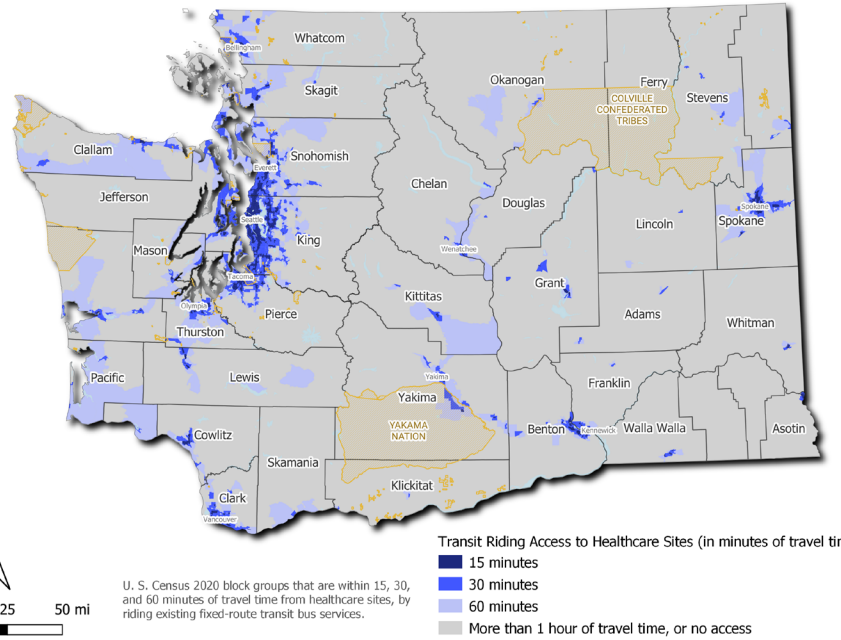
Access to Health Care

- Includes hospitals, clinics, medical and dental centers, and pharmacies.
- Most opportunities are concentrated in urban areas.
- Reduced access in rural areas on all modes of transportation.
- Access to healthcare was reported as more challenging during the nondriver survey and focus groups.









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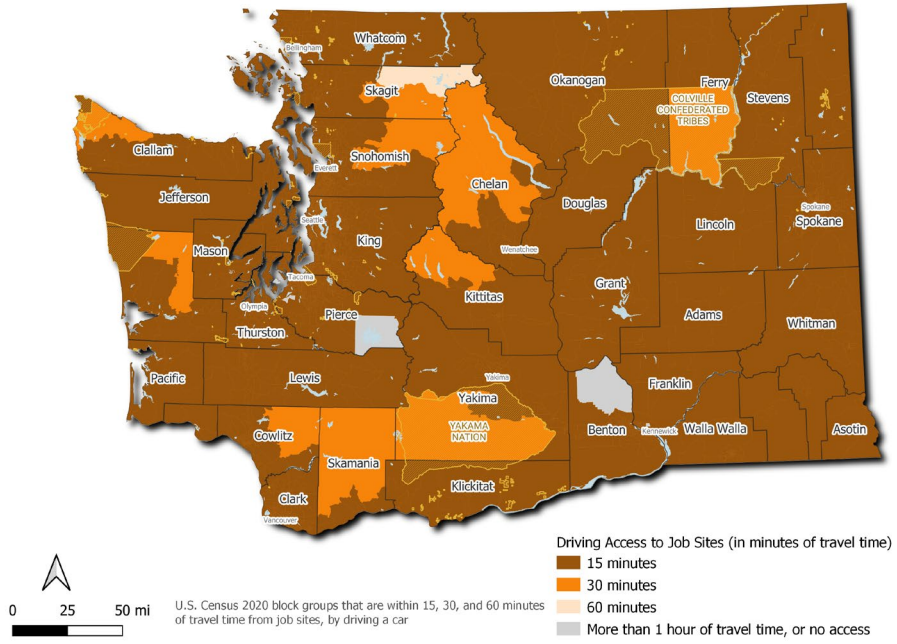
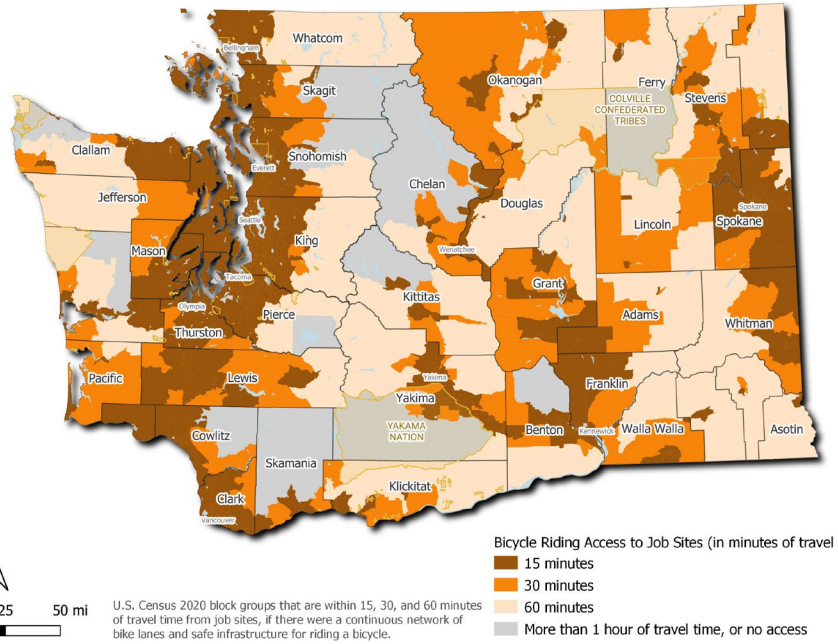
Access to Employment

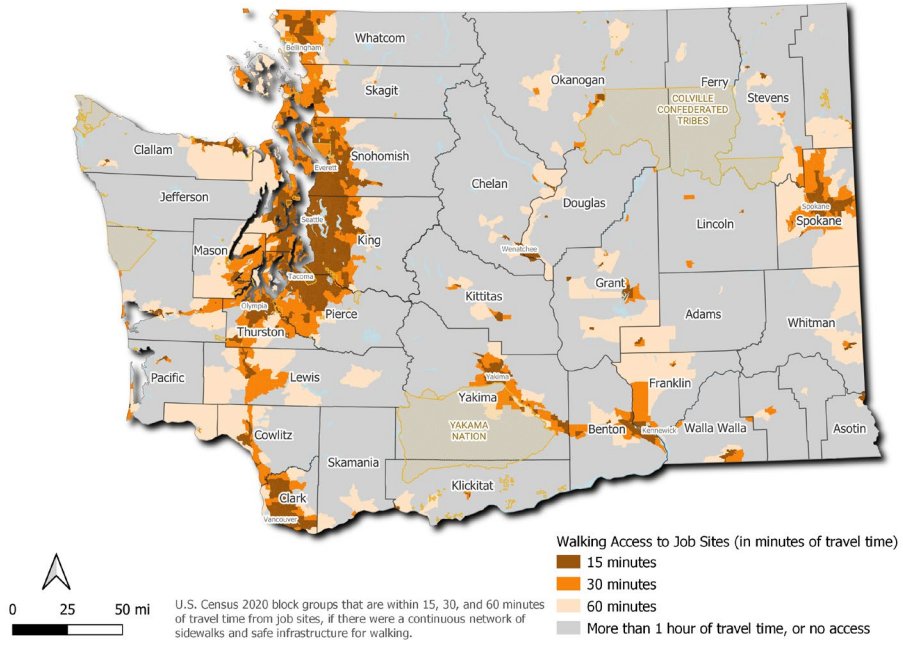
- Includes jobs in all industries.
- Job sites and opportunities are concentrated in urban areas but also dispersed throughout the state.
- Almost universal access to a job opportunity within a 60-minute drive. Reduced access via public transit, and significant access potential for a 60-minute walk and bike trip.



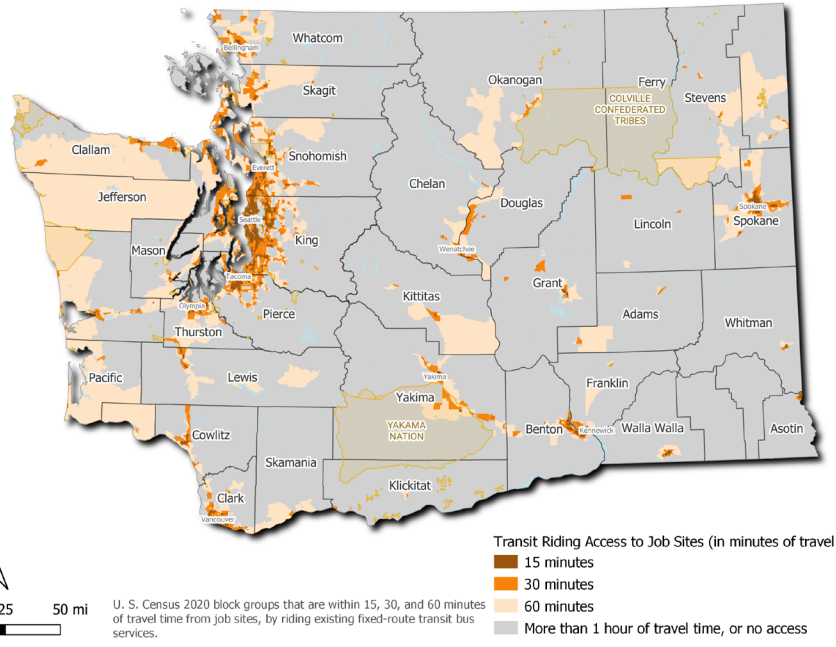
U.S. Census 2020 block groups that are within 15, 30, and 60 minutes of travel time from job sites, by driving a car



U.S. Census 2020 block groups that are within 15, 30, and 60 minutes of travel time from job sites, if there were a continuous network of bike lanes and safe infrastructure for riding a bicycle.



U.S. Census 2020 block groups that are within 15, 30, and 60 minutes of travel time from job sites, if there were a continuous network of sidewalks and safe infrastructure for walking.



U. S. Census 2020 block groups that are within 15, 30, and 60 minutes of travel time from job sites, by riding existing fixed-route transit bus services.

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WASHINGTON STATE

Driving	15 min	30 min	60 min
Health	98.1%	99.8%	100.0%
Food	99.8%	100.0%	100.0%
Jobs	99.8%	99.8%	99.8%
Schools	99.9%	100.0%	100.0%
Parks	99.9%	100.0%	100.0%
Other	99.6%	100.0%	100.0%

Biking	15 min	30 min	60 min
Health	86.0%	94.1%	98.6%
Food	92.6%	97.7%	99.7%
Jobs	99.1%	99.7%	99.8%
Schools	92.6%	98.0%	99.8%
Parks	93.8%	98.3%	99.8%
Other	89.3%	97.2%	99.7%

Walking	15 min	30 min	60 min
Health	54.9%	76.4%	87.9%
Food	65.4%	84.1%	94.1%
Jobs	94.2%	97.8%	99.3%
Schools	70.8%	85.7%	94.0%
Parks	78.5%	88.1%	95.0%
Other	51.9%	77.3%	91.4%

Transit	15 min	30 min	60 min
Health	53.9%	67.1%	75.0%
Food	55.5%	68.0%	75.4%
Jobs	56.3%	68.2%	75.5%
Schools	54.2%	67.5%	75.2%
Parks	55.4%	67.9%	75.3%
Other	53.4%	67.6%	75.2%

KING COUNTY

Driving	15 min	30 min	60 min
Health	99.9%	100.0%	100.0%
Food	100.0%	100.0%	100.0%
Jobs	100.0%	100.0%	100.0%
Schools	100.0%	100.0%	100.0%
Parks	100.0%	100.0%	100.0%
Other	100.0%	100.0%	100.0%

Biking	15 min	30 min	60 min
Health	99.0%	99.8%	99.9%
Food	99.1%	99.8%	100.0%
Jobs	99.9%	100.0%	100.0%
Schools	99.4%	99.8%	100.0%
Parks	99.7%	99.9%	100.0%
Other	99.1%	99.9%	100.0%

Walking	15 min	30 min	60 min
Health	76.1%	94.5%	99.3%
Food	82.8%	95.5%	99.4%
Jobs	99.5%	99.8%	99.9%
Schools	90.4%	98.3%	99.6%
Parks	96.3%	99.0%	99.7%
Other	75.9%	95.5%	99.4%

Transit	15 min	30 min	60 min
Health	73.5%	84.4%	90.2%
Food	73.8%	84.4%	90.2%
Jobs	74.0%	84.4%	90.2%
Schools	73.5%	84.4%	90.1%
Parks	73.9%	84.4%	90.2%
Other	73.4%	84.4%	90.2%

YAKIMA COUNTY

Driving	15 min	30 min	60 min
Health	96.1%	99.2%	100.0%
Food	99.6%	100.0%	100.0%
Jobs	100.0%	100.0%	100.0%
Schools	99.6%	100.0%	100.0%
Parks	99.7%	100.0%	100.0%
Other	99.3%	100.0%	100.0%

Biking	15 min	30 min	60 min
Health	75.3%	91.8%	98.1%
Food	89.2%	96.3%	99.5%
Jobs	98.7%	99.8%	100.0%
Schools	92.5%	97.7%	99.4%
Parks	89.0%	96.6%	99.4%
Other	79.9%	95.0%	99.2%

Walking	15 min	30 min	60 min
Health	41.1%	64.7%	78.4%
Food	63.1%	79.9%	90.9%
Jobs	93.4%	97.2%	99.1%
Schools	65.8%	82.8%	93.9%
Parks	66.7%	79.7%	91.2%
Other	40.3%	68.8%	83.2%

Transit	15 min	30 min	60 min
Health	47.2%	61.2%	70.5%
Food	52.2%	62.8%	70.6%
Jobs	52.2%	62.8%	70.6%
Schools	49.6%	61.2%	70.5%
Parks	51.2%	62.5%	70.6%
Other	48.3%	60.3%	69.0%

OKANOGAN COUNTY

Driving	15 min	30 min	60 min
Health	82.7%	99.9%	100.0%
Food	92.8%	100.0%	100.0%
Jobs	100.0%	100.0%	100.0%
Schools	98.7%	100.0%	100.0%
Parks	95.4%	100.0%	100.0%
Other	92.6%	100.0%	100.0%

Biking	15 min	30 min	60 min
Health	32.7%	50.2%	78.3%
Food	42.9%	67.2%	91.7%
Jobs	88.5%	98.6%	100.0%
Schools	51.2%	76.2%	96.6%
Parks	48.8%	67.5%	93.6%
Other	45.5%	66.1%	92.4%

Walking	15 min	30 min	60 min
Health	10.5%	22.6%	36.7%
Food	16.1%	27.3%	47.4%
Jobs	51.1%	71.6%	91.6%
Schools	17.2%	32.7%	56.6%
Parks	21.6%	36.3%	52.2%
Other	14.1%	28.4%	49.8%

Transit	15 min	30 min	60 min
Health	15.0%	23.0%	33.8%
Food	17.3%	26.2%	34.2%
Jobs	19.4%	27.6%	34.3%
Schools	18.0%	26.0%	33.8%
Parks	17.0%	26.5%	33.9%
Other	15.5%	27.4%	34.3%

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Percentages indicate the percent of the population that has access to each travel destination group by mode of transportation. Large urban counties have higher levels of access than small rural counties on all modes of transportation. Employment has the highest level of access. Healthcare has the lowest level of access.

Key Transportation Options Analysis Findings

- ✓ Access to a vehicle provides almost universal access to daily life activities statewide. The lowest level of access is found in rural counties for short trips of no more than 15 minutes. In contrast, urban areas concentrate many daily life opportunities within a 15-minute car trip.
- ✓ Public transit access to daily life activities is restricted to the extent of the fixed-route network and the span of service. There are major differences in access and availability between large and small counties. For example: urban transit systems in the largest counties have a longer span of service hours, from early in the morning to late at night.
- ✓ Walking has the potential to provide access to many daily life activities in trips of 30 and 60 minutes. At least 50% of the population in urban areas could reach destinations by walking if there were adequate accessible safe facilities along all segments of the transportation network.
- ✓ Riding a bicycle also shows great potential to provide access to many daily life activities in trips of 15 and 30 minutes. At least 80% of the population in urban areas could reach destinations riding a bike if there were adequate safe and continuous facilities, including sufficient bike parking options at destinations.

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Next Steps

- ❑ Publish Nondriver Population interactive map & database
- ❑ Deliver Draft Report – January 16, 2023
- ❑ Deliver Final Report – February 1, 2023

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Questions?

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