Southeast Minnesota Travel Study
Project Overview
Updated January 2016

Overview of Existing Conditions
- Market Assessment
- Travel Behavior Analysis
- Report on Public Input: Perceptions and Preferences
- Preliminary Opportunities
- Preliminary Ridership Estimates
The purpose of this study is to determine what types of new services might be feasible and to assess alternatives and recommendations for implementing new services.

Eleven counties:

- Dodge
- Houston
- Steele
- Fillmore
- Mower
- Wabasha
- Freeborn
- Olmsted
- Winona
- Goodhue
- Rice
# Scope of Work

<table>
<thead>
<tr>
<th>Task</th>
<th>Deliverables</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Project Management and Coordination</td>
<td>• Ongoing</td>
</tr>
<tr>
<td>2. Public Involvement</td>
<td>• Focus Groups and Public Meetings</td>
</tr>
</tbody>
</table>
| 3. Existing Conditions: Commuter and Non-Commuter Demographics, Attitudes, And Behaviors | • Market Assessment  
• Travel Behavior Analysis  
• Public Input: Perceptions and Preferences  
• Preliminary Regional Transportation Service Opportunities |
| 4. Create Inventory of Existing Facilities And Conditions | |
| 5. Southeast Minnesota Network Recommendations | • Modeling and evaluation  
• Draft recommendations |
| 6. Plan Preparation and Editing Final Southeast Minnesota Regional Travel Study | • Draft and Final Reports  
• Public Outreach |
Major Findings

- Market Assessment
- Travel Behavior Analysis
- Public Input: Perceptions and Preferences
- Preliminary Regional Transportation Service Opportunities
Market Assessment

- Previous Studies and Plans
- Demographic and Employment Characteristics
- Existing Transportation Services and Infrastructure
Population Density
Market Assessment | Demographics & Employment

Businesses Employing 500 or More People

Major Employers in District 6 (500 or More Employees)
- 500 to 999
- 1,000 to 4,999
- 5,000 to 9999

Data Sources: MN DOT, US Census, ESRI
Small sample from survey, but reflective of the range of employer types

90% of the surveyed employers provide free parking; the others mostly provide no parking

Surveyed employers generally do not provide information about transportation options, but many said they would be willing to if it were available.
Market Assessment | Employer Input

- Largest number of job shifts begin in 7:00 AM hour and end in 3:00 PM hour
- Most employers said they would be adding employees in the future
- Other issues:
  - Challenging to get employees to rural worksites
  - Difficult to organize car and vanpools due to the geographical spread of their workers’ home locations.
  - Lack of alternative transportation options in rural areas makes it hard to retain employees due to the additional cost and time burden of commuting to work.
## Market Assessment | Transit & Transport Infrastructure

<table>
<thead>
<tr>
<th>System</th>
<th>MnDOT Peer Group</th>
<th>Service Area</th>
<th>Population Served</th>
</tr>
</thead>
<tbody>
<tr>
<td>La Crescent Apple Express (La Crosse MTU)</td>
<td>Urban Fixed-Route</td>
<td>La Crescent, MN and La Crosse, WI</td>
<td>56,000+</td>
</tr>
<tr>
<td>Rochester Public Transit</td>
<td>Urban Fixed-Route</td>
<td>City of Rochester</td>
<td>106,000+</td>
</tr>
<tr>
<td>Rolling Hills Transit (SEMCAC)</td>
<td>Multi-County</td>
<td>Dodge, Fillmore, Houston, Olmsted, and Winona Counties</td>
<td>113,000+</td>
</tr>
<tr>
<td>SMART</td>
<td>Multi-County</td>
<td>Freeborn, Mower, and Steele Counties</td>
<td>93,000+</td>
</tr>
<tr>
<td>Three Rivers Hiawathaland Transit</td>
<td>Multi-County</td>
<td>Rice, Goodhue and Wabasha Counties</td>
<td>68,000+</td>
</tr>
<tr>
<td>Winona Transit Service</td>
<td>Small Urban</td>
<td>City of Winona</td>
<td>27,000+</td>
</tr>
</tbody>
</table>
Market Assessment | Transit & Transport Infrastructure
Large portions of the study area are very rural with sparsely distributed populations.

Isolation of both jobsites and workforce will prove challenging in offering alternative transportation choice for some commuters.
Each transit system in SE Minnesota has its own fare mechanism, service span, and information resources

- Must consider ways to develop more consistent policies and approaches to providing service and informing the public

Markets for new regional transportation service are diverse, though commuters are most obvious

- Need to identify core markets in order to prioritize critical corridors to serve
Travel Behavior Analysis

Home-Based Work Trips

Analyzed and mapped US Census Longitudinal Employer-Household Dynamics (LEHD) and mobile phone signal data
Travel Behavior Analysis

Home-Based Work Trips

Rochester as Destination
Travel Behavior Analysis

Home-Based Other Trips

Rochester as Destination
## Travel Behavior Analysis

### Primary Trip Pairs (HBW and Other Trips)

<table>
<thead>
<tr>
<th></th>
<th>Origin</th>
<th>Destination</th>
<th>Avg. Daily Total Volume (Home-Based Trips)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>25 (Eyota, St. Charles)</td>
<td>Rochester</td>
<td>11,209</td>
</tr>
<tr>
<td>2</td>
<td>Rochester</td>
<td>25 (Eyota, St. Charles)</td>
<td>10,704</td>
</tr>
<tr>
<td>3</td>
<td>30 (Dodge Center, Kasson)</td>
<td>Rochester</td>
<td>9,969</td>
</tr>
<tr>
<td>4</td>
<td>31 (Stewartville, Brownsdale)</td>
<td>Rochester</td>
<td>9,932</td>
</tr>
<tr>
<td>5</td>
<td>Rochester</td>
<td>30 (Dodge Center, Kasson)</td>
<td>9,741</td>
</tr>
<tr>
<td>6</td>
<td>Rochester</td>
<td>31 (Stewartville, Brownsdale)</td>
<td>9,547</td>
</tr>
<tr>
<td>7</td>
<td>26 (Zumbrota, Pine Island)</td>
<td>Rochester</td>
<td>9,214</td>
</tr>
<tr>
<td>8</td>
<td>Rochester</td>
<td>26 (Zumbrota, Pine Island)</td>
<td>8,663</td>
</tr>
<tr>
<td>9</td>
<td>La Crescent</td>
<td>La Crosse</td>
<td>7,039</td>
</tr>
<tr>
<td>10</td>
<td>La Crosse</td>
<td>La Crosse</td>
<td>6,977</td>
</tr>
<tr>
<td>11</td>
<td>06 (N of Faribault)</td>
<td>Twin Cities and Southern Suburbs</td>
<td>6,734</td>
</tr>
<tr>
<td>12</td>
<td>Twin Cities and Southern Suburbs</td>
<td>06 (N of Faribault)</td>
<td>6,616</td>
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<tr>
<td>13</td>
<td>Northfield</td>
<td>Twin Cities and Southern Suburbs</td>
<td>6,433</td>
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<tr>
<td>14</td>
<td>25 (Eyota, St. Charles)</td>
<td>Winona</td>
<td>5,660</td>
</tr>
<tr>
<td>15</td>
<td>09 (Plainview/Elgin)</td>
<td>Rochester</td>
<td>5,488</td>
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<tr>
<td>16</td>
<td>Winona</td>
<td>25 (Eyota, St. Charles)</td>
<td>5,478</td>
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<tr>
<td>17</td>
<td>Rochester</td>
<td>09 (Plainview/Elgin)</td>
<td>5,185</td>
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<tr>
<td>18</td>
<td>13 (Caledonia, Brownsville, Freeburg)</td>
<td>La Crosse</td>
<td>4,463</td>
</tr>
<tr>
<td>19</td>
<td>Rochester</td>
<td>Twin Cities and Southern Suburbs</td>
<td>4,423</td>
</tr>
<tr>
<td>20</td>
<td>Red Wing</td>
<td>Twin Cities and Southern Suburbs</td>
<td>4,351</td>
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<tr>
<td>21</td>
<td>La Crosse</td>
<td>13 (Caledonia, Brownsville, Freeburg)</td>
<td>4,238</td>
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<tr>
<td>22</td>
<td>15 (Chatfield, Preston)</td>
<td>Rochester</td>
<td>3,853</td>
</tr>
<tr>
<td>23</td>
<td>16 (Spring Valley)</td>
<td>Rochester</td>
<td>3,841</td>
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<tr>
<td>24</td>
<td>Rochester</td>
<td>15 (Chatfield, Preston)</td>
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<td>25</td>
<td>Owatonna</td>
<td>Faribault</td>
<td>3,536</td>
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<td>Owatonna</td>
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<td>Rochester</td>
<td>16 (Spring Valley)</td>
<td>3,466</td>
</tr>
<tr>
<td>28</td>
<td>Faribault</td>
<td>Northfield</td>
<td>3,017</td>
</tr>
</tbody>
</table>
Key links for home-based trips:
- Cities in the northern part of the study area with destinations in the Twin Cities
- Key cities and towns with Rochester

Of daily home-based trips, 2/3 are not for work

Highest travel volumes at AM Peak, followed by Midday and PM peak

Significant levels of internal commuting within each analysis zone

Approximately 50% of commuters travel to another county for work
Public Input: Perceptions and Preferences

**Household Travel Survey**
- 1,500+ random households
- Weighted to reflect population differences between counties

**On-Board Survey**
- Administered to users of Hiawathaland Transit, La Crosse MTU (La Crescent route only), Rolling Hills Transit, SMART, and Winona Transit Service

**Focus Groups**
- Austin, Faribault, Red Wing, and Winona
- Riders and non-riders
Percentage of “Drive-Alone Commuters” by County

- Dodge: 91%
- Fillmore: 75%
- Freeborn: 91%
- Goodhue: 96%
- Houston: 91%
- Mower: 72%
- Olmsted/Rochester: 81%
- Olmsted/Rest: 82%
- Rice: 91%
- Steele: 93%
- Wabasha: 93%
- Winona: 94%
Average AM Commute Travel Time by County - Minutes

- Dodge: 29 minutes
- Fillmore: 29 minutes
- Freeborn: 23 minutes
- Goodhue: 17 minutes
- Houston: 14 minutes
- Mower: 17 minutes
- Olmsted/Rochester: 18 minutes
- Olmsted/Rest: 27 minutes
- Rice: 22 minutes
- Steele: 16 minutes
- Wabasha: 19 minutes
- Winona: 19 minutes
Public Input | Household Survey

Average PM Commute Travel Time by County - Minutes

<table>
<thead>
<tr>
<th>County</th>
<th>PM Commute Time (Minutes)</th>
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</thead>
<tbody>
<tr>
<td>Dodge</td>
<td>30</td>
</tr>
<tr>
<td>Fillmore</td>
<td>30</td>
</tr>
<tr>
<td>Freeborn</td>
<td>25</td>
</tr>
<tr>
<td>Goodhue</td>
<td>19</td>
</tr>
<tr>
<td>Houston</td>
<td>16</td>
</tr>
<tr>
<td>Mower</td>
<td>17</td>
</tr>
<tr>
<td>Olmsted/Rochester</td>
<td>21</td>
</tr>
<tr>
<td>Olmsted/Rest</td>
<td>28</td>
</tr>
<tr>
<td>Rice</td>
<td>24</td>
</tr>
<tr>
<td>Steele</td>
<td>18</td>
</tr>
<tr>
<td>Wabasha</td>
<td>21</td>
</tr>
<tr>
<td>Winona</td>
<td>21</td>
</tr>
</tbody>
</table>
Public Input | Household Survey

Transit Use in Past 12 Months (by County)
Likelihood of Using Commuter/Express Bus to Twin Cities by County

- Dodge
- Fillmore
- Freeborn
- Goodhue
- Houston
- Mower
- Olmsted/Rochester
- Olmsted/Rest
- Rice
- Steele
- Wabasha
- Winona
Public Input – Household Survey

Likelihood of Using Commuter/Express Bus to Rochester by County

<table>
<thead>
<tr>
<th>County</th>
<th>Peak</th>
<th>Midday</th>
<th>Evening</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dodge</td>
<td>45%</td>
<td>40%</td>
<td>0%</td>
</tr>
<tr>
<td>Fillmore</td>
<td>20%</td>
<td>15%</td>
<td>5%</td>
</tr>
<tr>
<td>Freeborn</td>
<td>15%</td>
<td>10%</td>
<td>0%</td>
</tr>
<tr>
<td>Goodhue</td>
<td>10%</td>
<td>5%</td>
<td>0%</td>
</tr>
<tr>
<td>Houston</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Mower</td>
<td>35%</td>
<td>25%</td>
<td>10%</td>
</tr>
<tr>
<td>Olmsted/Rest</td>
<td>30%</td>
<td>20%</td>
<td>10%</td>
</tr>
<tr>
<td>Rice</td>
<td>20%</td>
<td>15%</td>
<td>5%</td>
</tr>
<tr>
<td>Steele</td>
<td>5%</td>
<td>10%</td>
<td>0%</td>
</tr>
<tr>
<td>Wabasha</td>
<td>10%</td>
<td>5%</td>
<td>0%</td>
</tr>
<tr>
<td>Winona</td>
<td>15%</td>
<td>10%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Surveys Completed: By Transit System

- Hiawathaland Transit: 131 surveys
- LA Crosse MTU: 54 surveys
- Rolling Hills Transit: 42 surveys
- SMART: 116 surveys
- Winona Transit Service: 92 surveys
Primary Trip Purpose

- Work: 33%
- Shopping: 22%
- Errands: 14%
- Social (visiting friends or family): 9%
- Event (sports, concert, etc.): 2%
- Other: 13%
- School: 7%
Frequency Riding Transit

- 5-7 days per week: 44%
- 2-4 days per week: 32%
- Once a week: 6%
- A few days per month: 13%
- Once a month or less: 3%
- This is my first time: 2%
- This is my first time: 2%
Length of Time Using Transit Service

- More than 5 years: 34%
- 1 month to 1 year: 21%
- 1-5 years: 39%
- Less than 1 month: 6%
Satisfaction with Availability of Transit Service in Community

- Very satisfied: 56%
- Satisfied: 30%
- Somewhat satisfied: 10%
- Somewhat dissatisfied: 4%
- Dissatisfied: <1%
- Very dissatisfied: >1%
Primary Factor in Mode Choice

- Convenience: 27%
- Safety: 16%
- Flexibility: 15%
- Cost: 14%
- Travel time: 17%
- Other: 10%
- Availability of parking at destination: 1%
Key destinations identified
- Rochester for work, medical, and shopping trips
- Mankato in western half of District
- La Crosse in eastern half of District

Work/commute trips primary reason for accessing key destinations
Shopping trips were a major topic of discussion, particularly for those living in more rural areas.

Bloomington was noted as a primary destination by the largest group of individuals describing a preference for travel to a destination in the Twin Cities region.

- Mall of America / Light-Rail park-and-ride
Transit Investment Priorities in Order of Preference

1. New regional public transit services
2. Incentives for taking transit, biking, ridesharing
3. New or expanded private providers
4. More and better information about available services
5. Special group trips
6. Formal vanpools
7. Ridesharing
8. New park-and-ride lots
Differences between potential markets regarding service priorities and preferences

Older adults seek more personalized, convenient service; younger riders are more sensitive to travel times

On-board amenities may appeal to commuter markets and encourage mode shift to transit
Preliminary Opportunities | Core Markets

- **Millennial**
  - Expect new and diverse mobility options; 26% of Population

- **Baby Boomers and Older Adults (Age 50+)**
  - Want to “age in place,” alternatives to driving; 34% of Population

- **Commuters**
  - Half of all Minnesota workers commute to a different county
  - Job growth in District 6 will continue, with clustering around Rochester

- **College Students**
  - Lower rates of automobile use, occasional regional trips

- **People with Disabilities**
  - Lower automobile use and higher transit dependence
  - Non-work trips: smaller share of trips than other markets
■ **Transit Demand / Market for Regional Service**
  – Transit is not a priority for many SE Minnesota residents
  – If new transportation services are offered, preference is for *regional public transit services* – *express/commuter routes*

■ **Modest Regional/Employment Growth**
  – Population growth rate of 15% over next 30 years
  – Influx of manufacturing and warehousing jobs outside of population centers with shift-based travel demand

■ **Limited Choices / Lack of Service Coordination**
  – Low levels of knowledge of transit options and DAR procedures
  – Separate fare mechanisms, service hours, and information resources

■ **Limited Public Information**
  – Regional travel, ridesharing, and connecting services
<table>
<thead>
<tr>
<th></th>
<th>Millennials</th>
<th>Baby Boomers &amp; Older Adults</th>
<th>Commuters</th>
<th>College Students</th>
<th>People with Disabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>New/expanded commuter routes to Rochester (public or private)</td>
<td>![Image]</td>
<td>![Image]</td>
<td>![Image]</td>
<td>![Image]</td>
<td>![Image]</td>
</tr>
<tr>
<td>Midday operation on existing commuter routes</td>
<td>![Image]</td>
<td>![Image]</td>
<td>![Image]</td>
<td>![Image]</td>
<td>![Image]</td>
</tr>
<tr>
<td>Scheduled transit to Twin Cities</td>
<td>![Image]</td>
<td>![Image]</td>
<td>![Image]</td>
<td>![Image]</td>
<td>![Image]</td>
</tr>
<tr>
<td>Specialized group trips to key medical/shopping destinations</td>
<td>![Image]</td>
<td>![Image]</td>
<td>![Image]</td>
<td>![Image]</td>
<td>![Image]</td>
</tr>
</tbody>
</table>
### Preliminary Opportunities | Service Concepts

<table>
<thead>
<tr>
<th>Millenials</th>
<th>Baby Boomers &amp; Older Adults</th>
<th>Commuters</th>
<th>College Students</th>
<th>People with Disabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Millennial Icon]</td>
<td>![Baby Boomer Icon]</td>
<td>![Commuter Icon]</td>
<td>![College Student Icon]</td>
<td>![Person with Disabilities Icon]</td>
</tr>
</tbody>
</table>

**Promotion and expansion of vanpools**
- Millennials: 🔴
- Baby Boomers & Older Adults: 🔴
- Commuters: 🔴
- College Students: 🔴
- People with Disabilities: 🔴

**Improved marketing/information for public transit and commuter route services**
- Millennials: 🔴
- Baby Boomers & Older Adults: 🔴
- Commuters: 🔴
- College Students: 🔴
- People with Disabilities: 🔴

**Financial incentives for commuters**
- Millennials: 🔴
- Baby Boomers & Older Adults: 🔴
- Commuters: 🔴
- College Students: 🔴
- People with Disabilities: 🔴

**Rideshare matching**
- Millennials: 🔴
- Baby Boomers & Older Adults: 🔴
- Commuters: 🔴
- College Students: 🔴
- People with Disabilities: 🔴

**Enhancements to local transit services (service span, service days, route design, etc.)**
- Millennials: 🔴
- Baby Boomers & Older Adults: 🔴
- Commuters: 🔴
- College Students: 🔴
- People with Disabilities: 🔴
Several corridors were evaluated for potential services.
Preliminary ridership estimates are as follows (to be updated mid-January):

<table>
<thead>
<tr>
<th>Route/Highway</th>
<th>Number of Stops</th>
<th>Total Daily Work Commute Trips</th>
<th>Adjusted Daily Work Commute Transit Trips Estimated</th>
<th>Total Adjusted Daily Transit Trips Estimated</th>
</tr>
</thead>
<tbody>
<tr>
<td>52 Preston-Rochester-Twin Cities</td>
<td>8</td>
<td>4,609</td>
<td>137</td>
<td>297</td>
</tr>
<tr>
<td>52X Rochester-Twin Cities Express</td>
<td>2</td>
<td>631</td>
<td>18</td>
<td>37</td>
</tr>
<tr>
<td>14 Owatonna-La Crosse</td>
<td>8</td>
<td>6,634</td>
<td>186</td>
<td>379</td>
</tr>
<tr>
<td>1-35 I-35 Albert Lea-Owatonna-Faribault-Twin Cities</td>
<td>8</td>
<td>4,812</td>
<td>143</td>
<td>292</td>
</tr>
<tr>
<td>44/16/14/61 Caledonia- La Crosse-Winona</td>
<td>3</td>
<td>8,57</td>
<td>23</td>
<td>47</td>
</tr>
<tr>
<td>61/10 Red Wing-Hastings- Twin Cities</td>
<td>4</td>
<td>6,147</td>
<td>185</td>
<td>379</td>
</tr>
<tr>
<td>I-90 W Albert Lea-Austin-Rochester</td>
<td>4</td>
<td>1,601</td>
<td>45</td>
<td>92</td>
</tr>
<tr>
<td>58 Red Wing- Zumbrota - Rochester</td>
<td>4</td>
<td>1356</td>
<td>36</td>
<td>73</td>
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<tr>
<td>63 S Spring Valley- Rochester</td>
<td>2</td>
<td>526</td>
<td>13</td>
<td>27</td>
</tr>
<tr>
<td>42 Plainview-Elgin-Rochester</td>
<td>3</td>
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<td>64</td>
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<tr>
<td>19 Faribault-Northfield-Red Wing</td>
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<td>2,115</td>
<td>60</td>
<td>122</td>
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<tr>
<td>52N Northfield-Twin Cities</td>
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<td>772</td>
<td>20</td>
<td>40</td>
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</tbody>
</table>
- Developing evaluation criteria
- Revising ridership estimation and corridors
- Developing a set of service investment alternatives