



2019

TRANSPORTATION MANAGEMENT ASSOCIATION
SURVEY RESULTS



Acknowledgments

The 2019 Transportation Management Association (TMA) Survey was conducted by UrbanTrans North America, including Kevin Luten, Matthew Kaufman, Ulla Hester, Paul Leonhardt, Ronald Soh, and Joddie Gray.

David Straus, Association for Commuter Transportation (ACT) Executive Director, and Julia Wean, ACT TMA Council Chair, provided significant assistance with survey design and promotion.

Special thanks to everyone that helped update current lists of TMAs in their local areas and distribute survey promotions.

Finally, thank you to the 99 TMAs that completed the 2019 TMA Survey. Without your time and contributions, this survey would not have been possible.

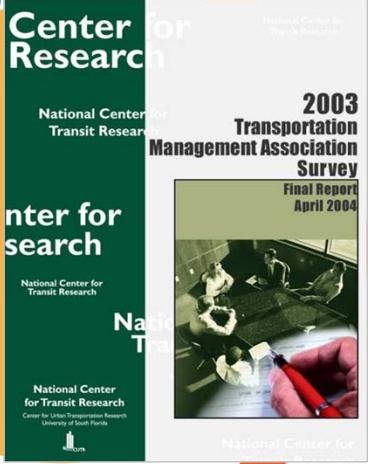
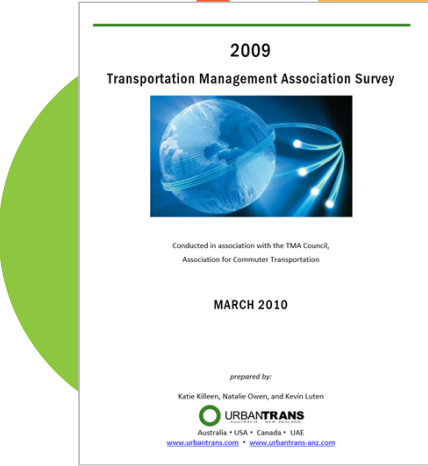
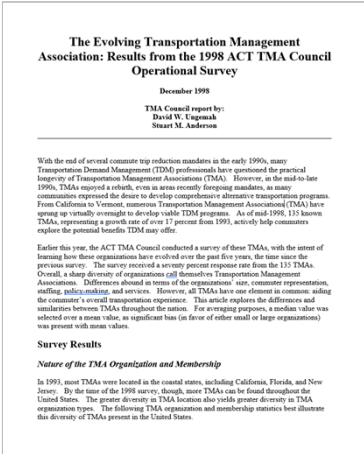


Introduction

In an effort to advance industry research, UrbanTrans North America volunteered to conduct the 2019 TMA Survey, in partnership with the ACT TMA Council.

The survey results are intended to provide reliable and impartial information regarding the organization and operation of TMAs. The results can be used by individual TMAs to assess how their organizations compare with others.

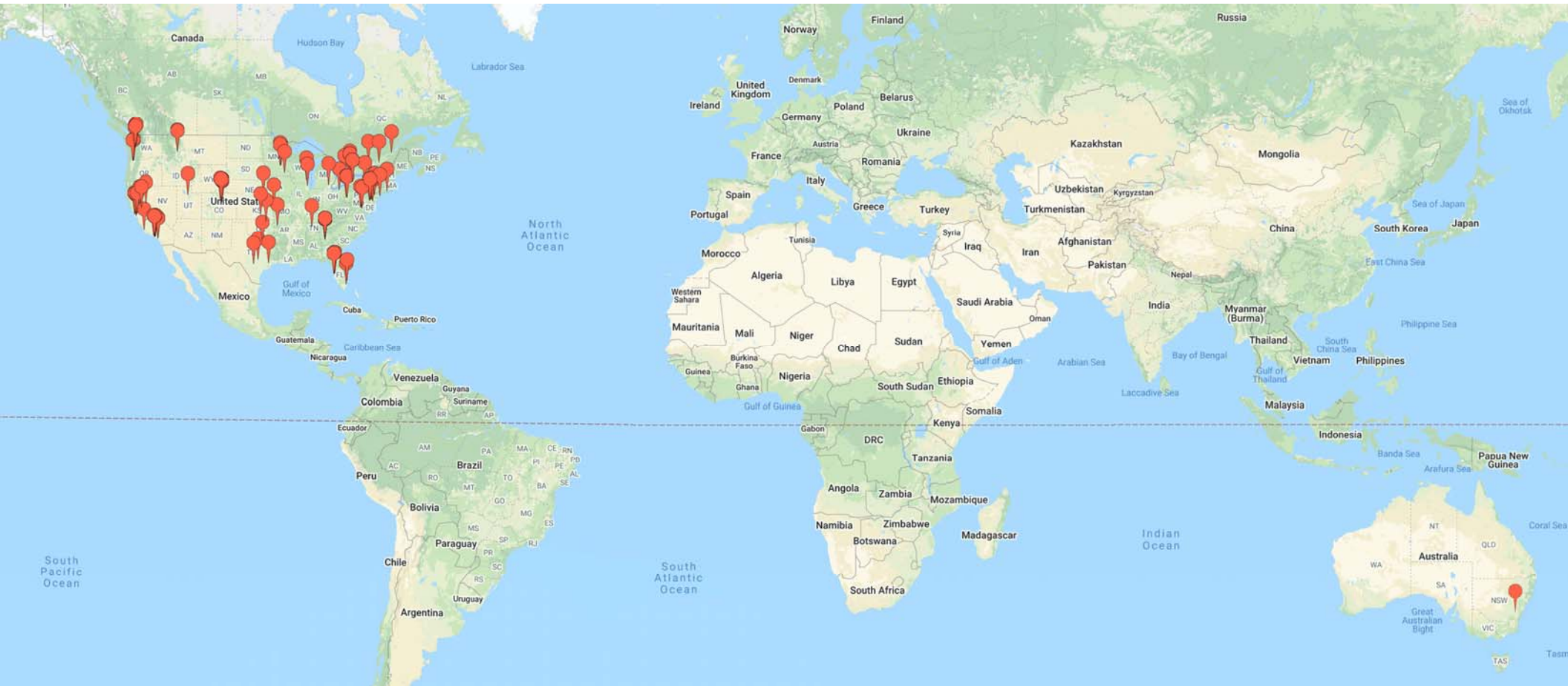
This is the sixth international survey of TMAs. The results tell a story of how TMAs have evolved since the first survey of TMAs done in 1993.



Survey process

- **SURVEY DESIGN:** UrbanTrans North America developed and programmed the online survey instrument, building upon prior TMA Survey designs to allow for data tracking over time where relevant. ACT provided review and guidance.
- **TMA IDENTIFICATION:** UrbanTrans North America collaborated with ACT and transportation demand management (TDM) professionals globally to identify as many TMAs and “TMA-like” organizations as possible. This process identified about 150 TMAs in the United States, 19 in Canada, and 13 outside of North America.
- **SURVEY PROMOTION:** ACT, the ACT TMA Council, and others promoted the survey through their networks and via the Center for Urban Transportation Research’s TDM listserv. UrbanTrans North America attempted to invite every TMA from the identification process via direct email. TDM professionals provided additional peer-to-peer promotion.
- **SURVEY DURATION AND RESPONSE RATES.** The survey was open across October and November 2019, with 99 TMAs completing the survey (89 from the United States, nine from Canada, and one from Australia).

Locations of the TMAs that completed the survey

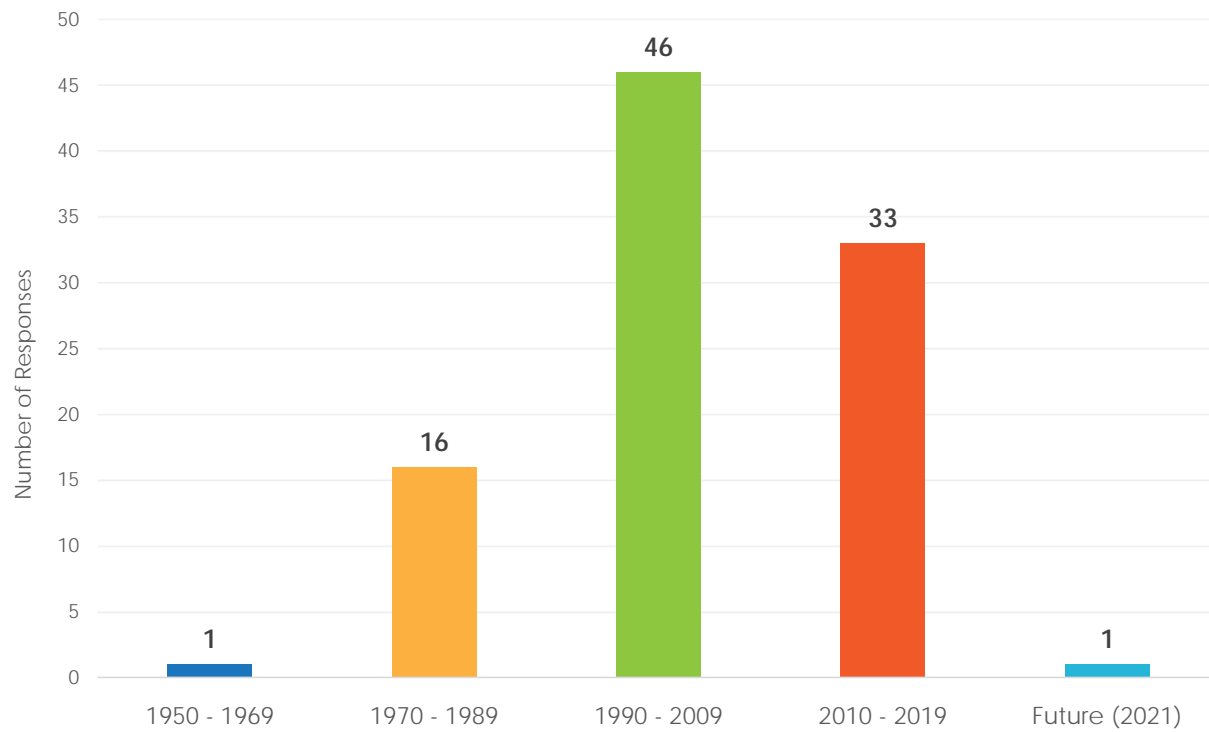


Survey results

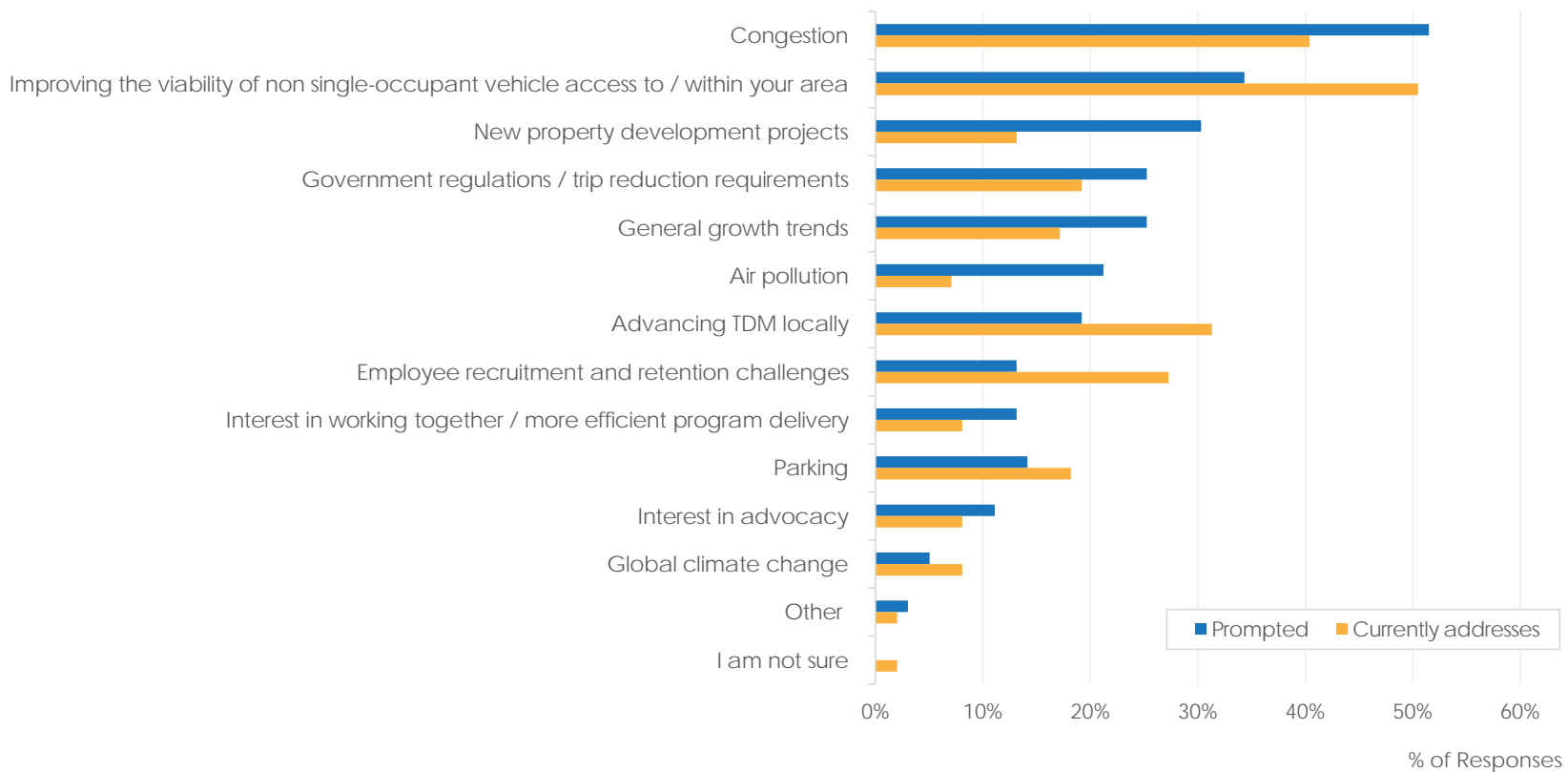
The following pages include the results of the 2019 TMA Survey. The results are presented in the nine sections (see the green tabs in the upper right):

1. Overview
2. Background
3. Organizational
4. Staffing
5. Financial
6. Membership
7. Travel Markets
8. Services
9. Measurement & Evaluation
10. Comments

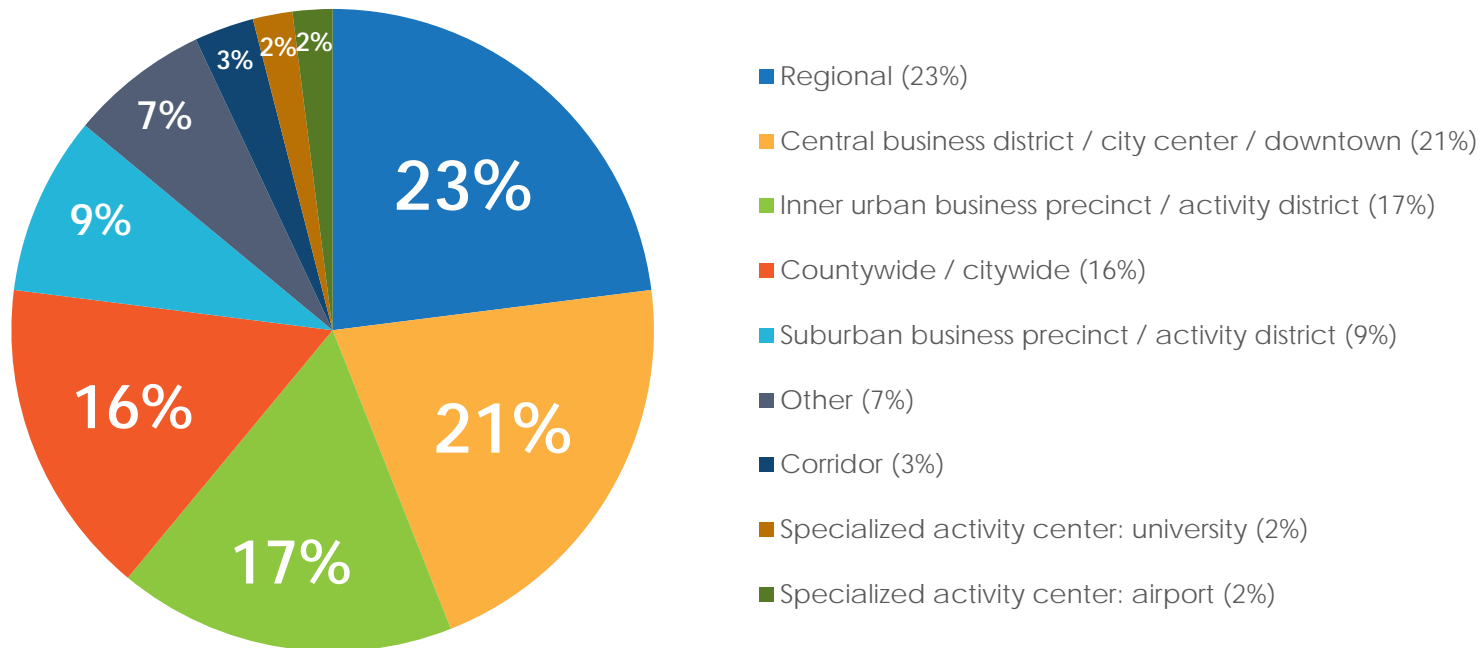
What year was your TMA formed? (N=97)



What were the top issues that prompted the formation of your TMA?
 What are the top issues your TMA currently addresses?
 (N=98)



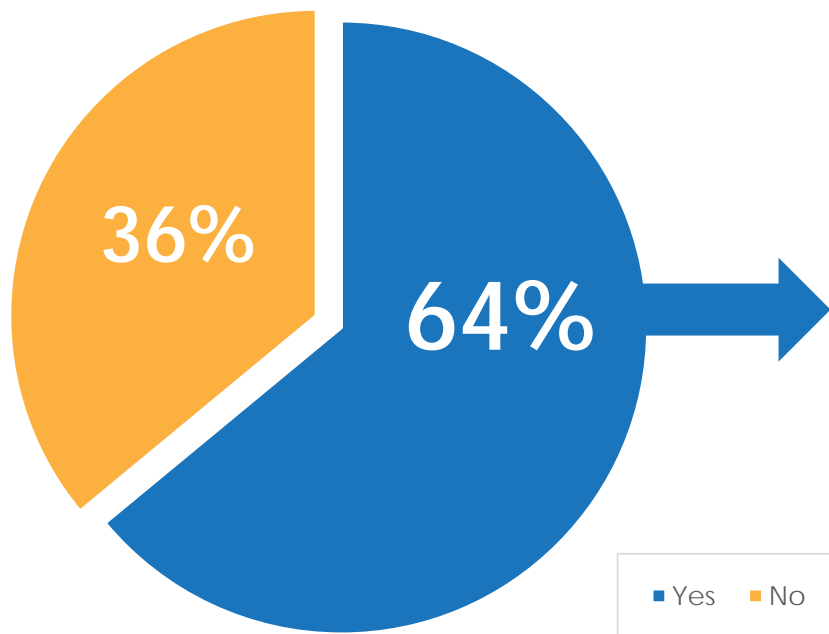
What is the geographic scope of your TMA?



Other included: media district, housing development, central business district plus surrounding neighborhoods, medical district

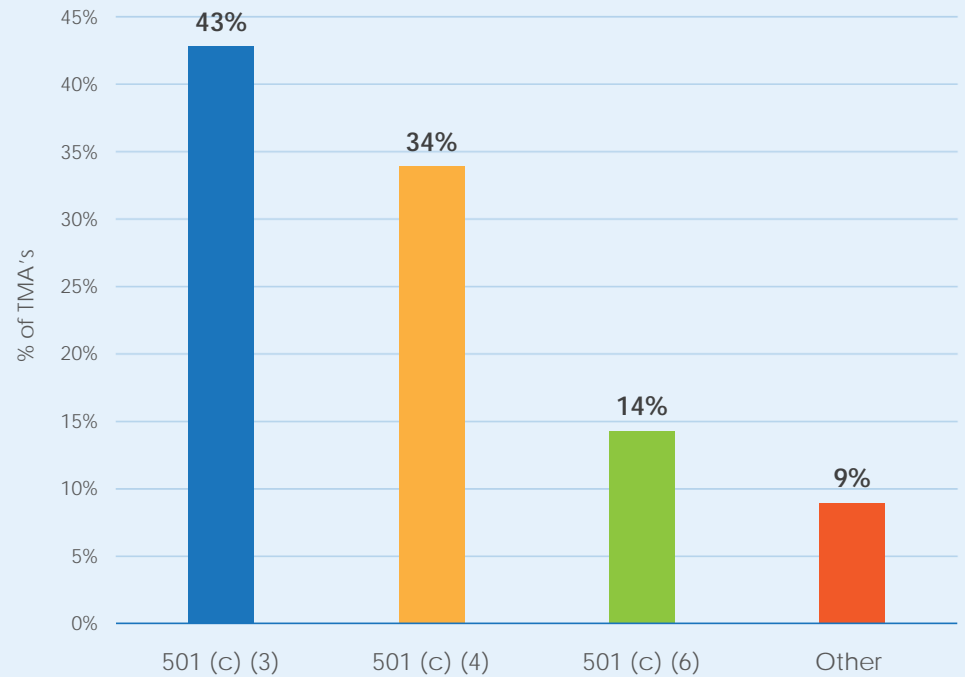
Is your TMA independently incorporated?

(N=97)



What is the IRS Status of your TMA?

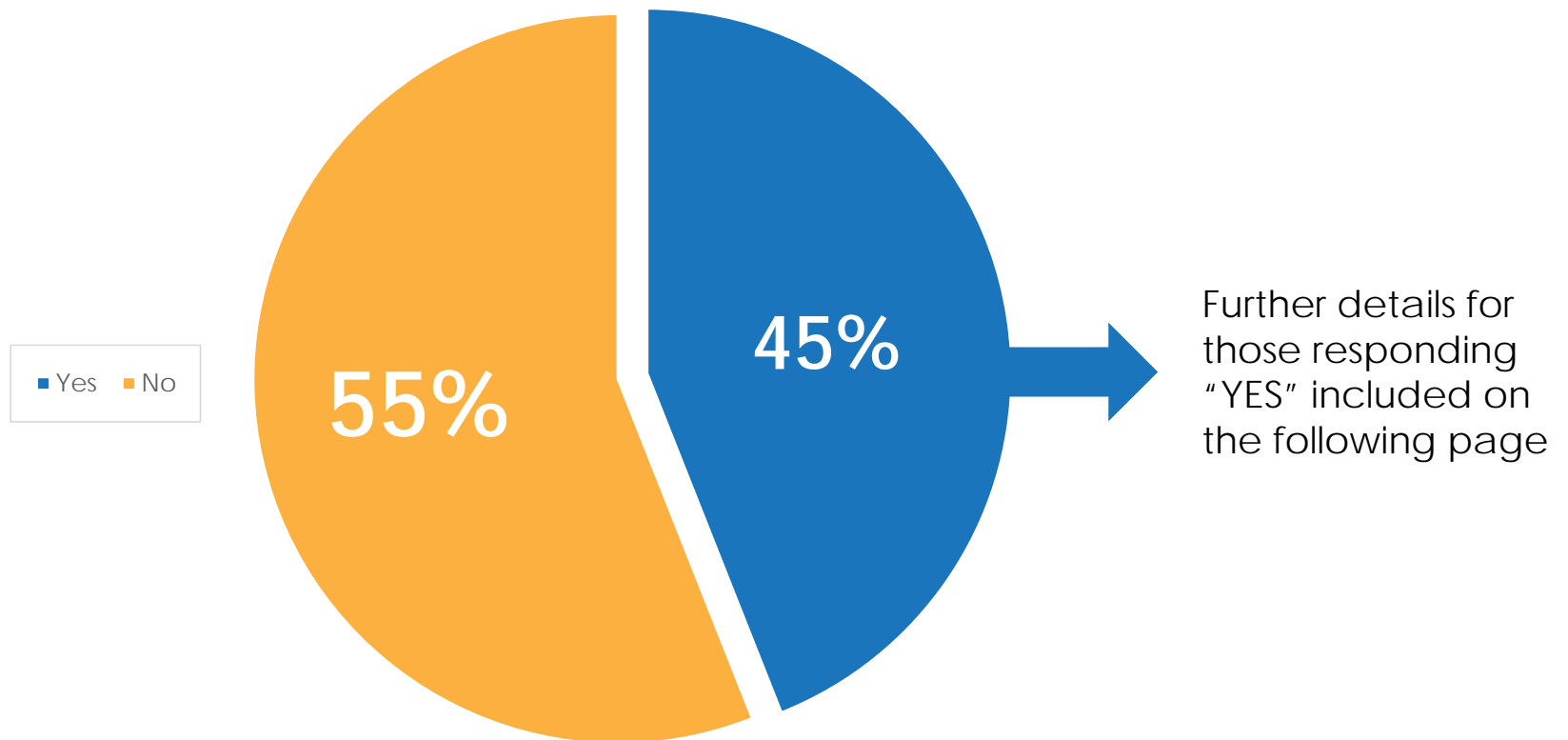
(Only asked of TMAs in the U.S., N=56)



Other included: non-profit instrument of county government, non-profit mutual benefit organization.

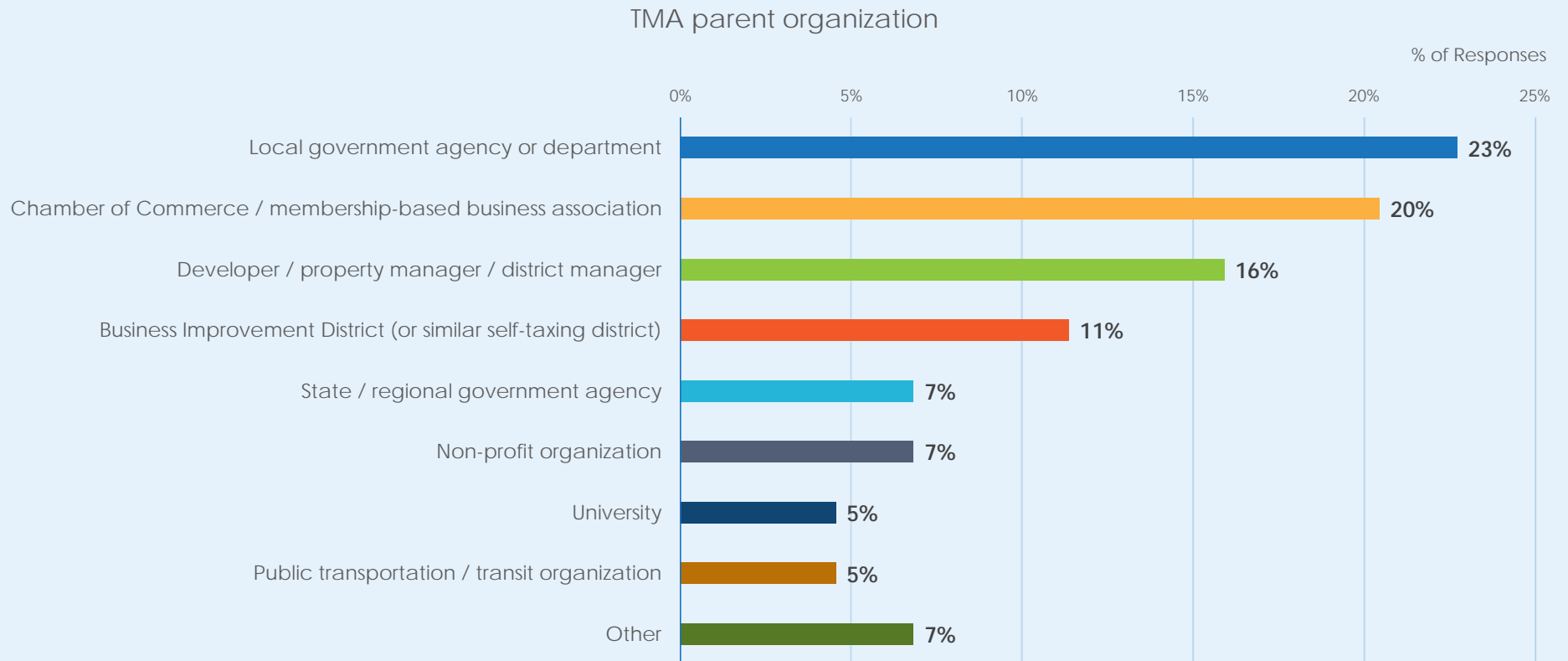
Is your TMA a subsidiary or internal department/program of an incorporated parent organization?

(N=99)

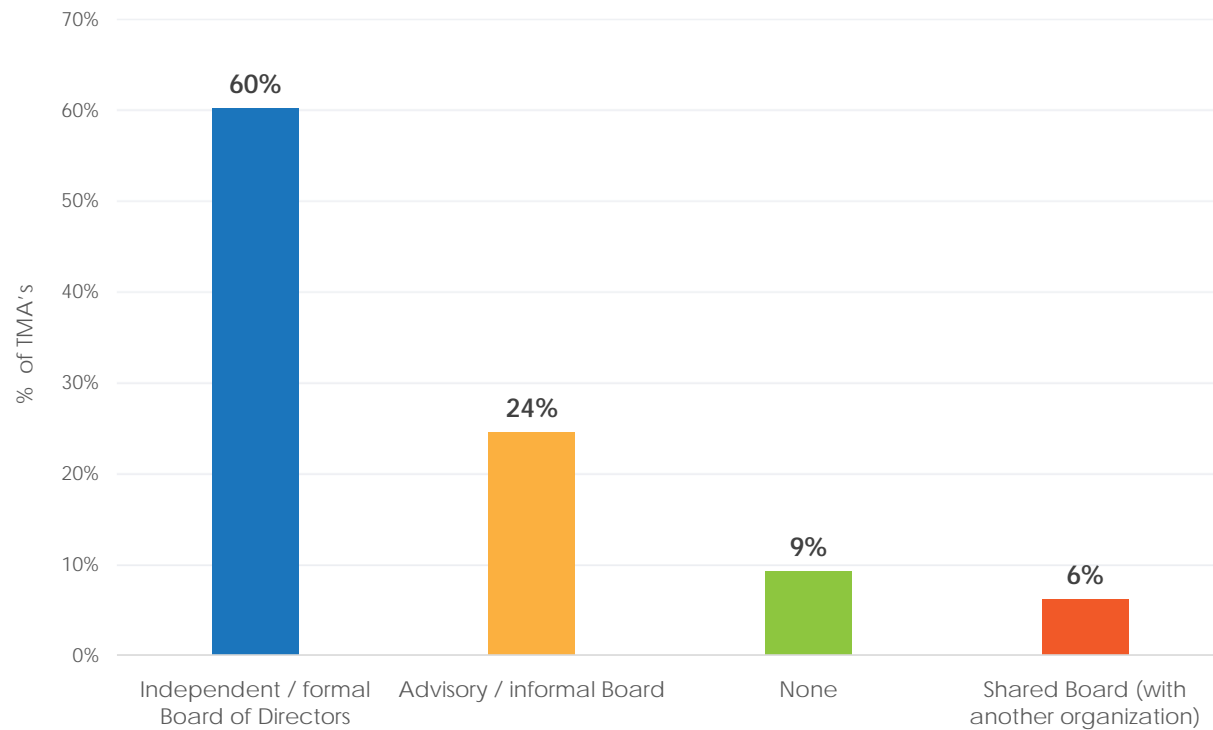


45% - TMA a subsidiary or internal department/program of an incorporated parent organization

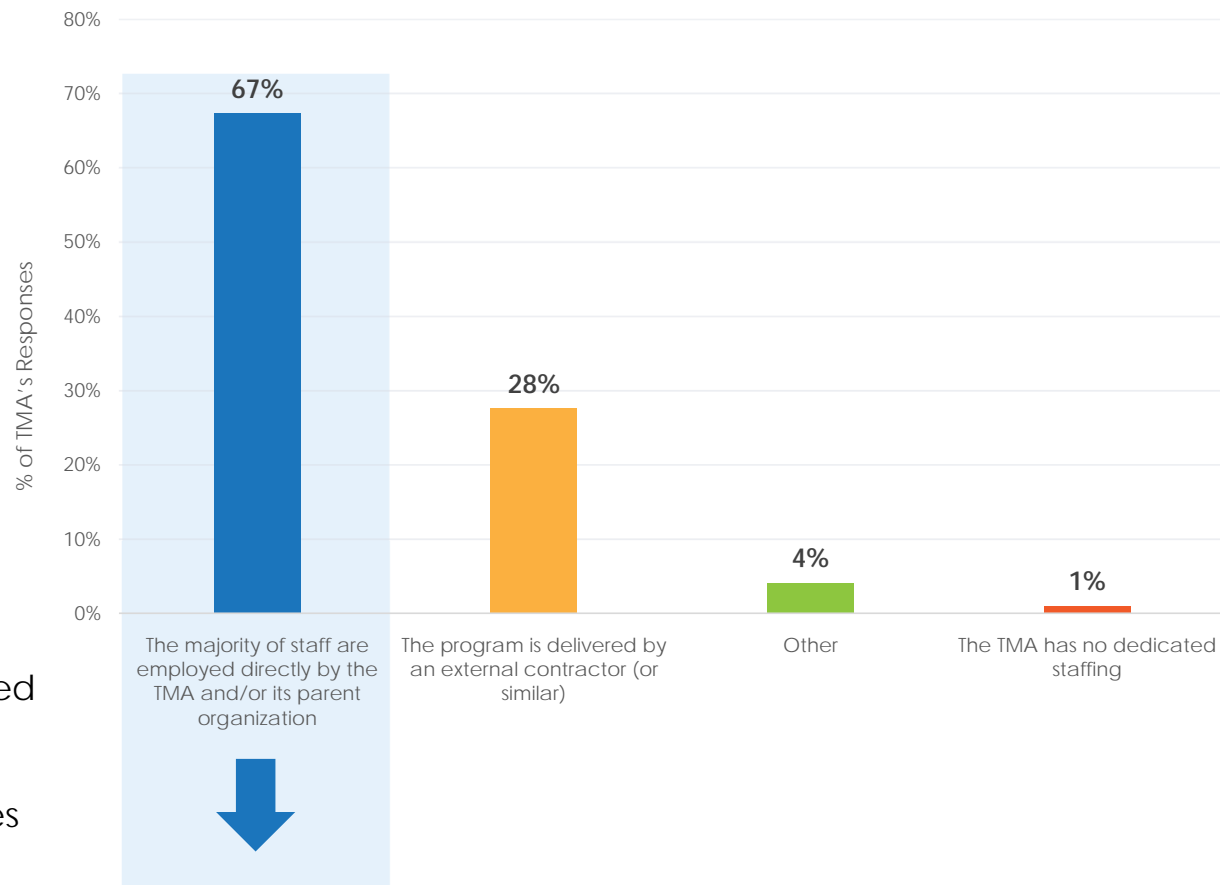
What type of organization is your parent organization? (N=44)



Which type of Board, if any, does your TMA use? (N=98)



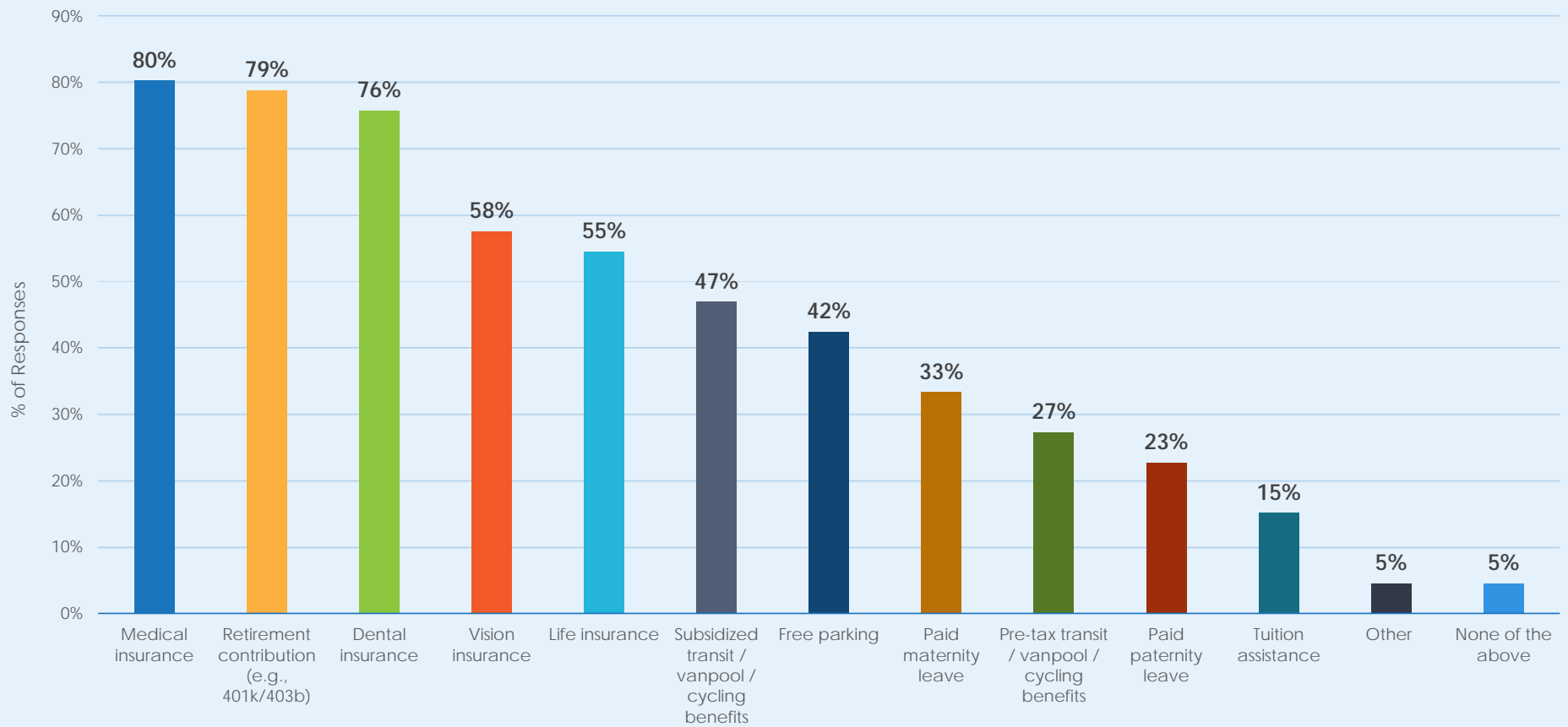
In terms of staffing day-to-day TMA administration and program delivery, which of the following best describes your organization? (N=98)



Further details provided by this group of respondents is shown on the next two pages

67% - The majority of staff are employed directly by the TMA and/or its parent organization

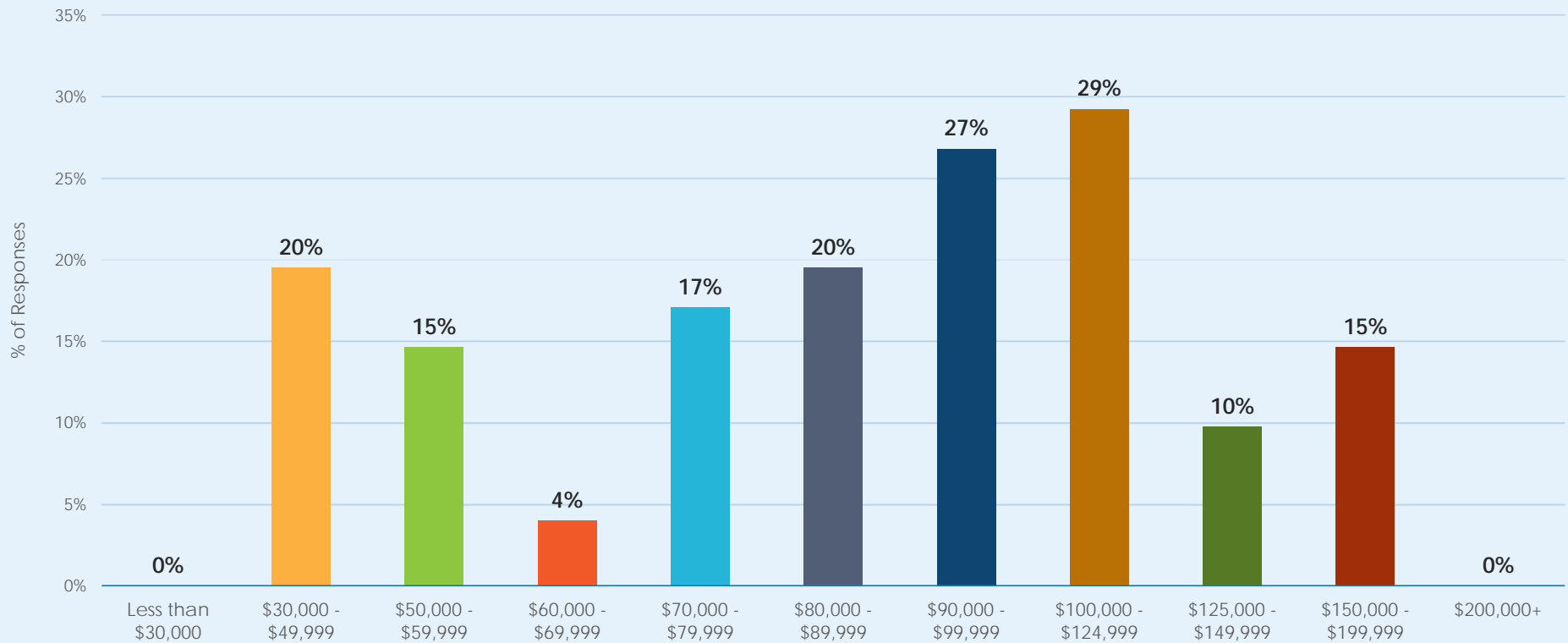
Which of the following benefits are provided to TMA staff? (N=66)



67% - The majority of staff are employed directly by the TMA and/or its parent organization

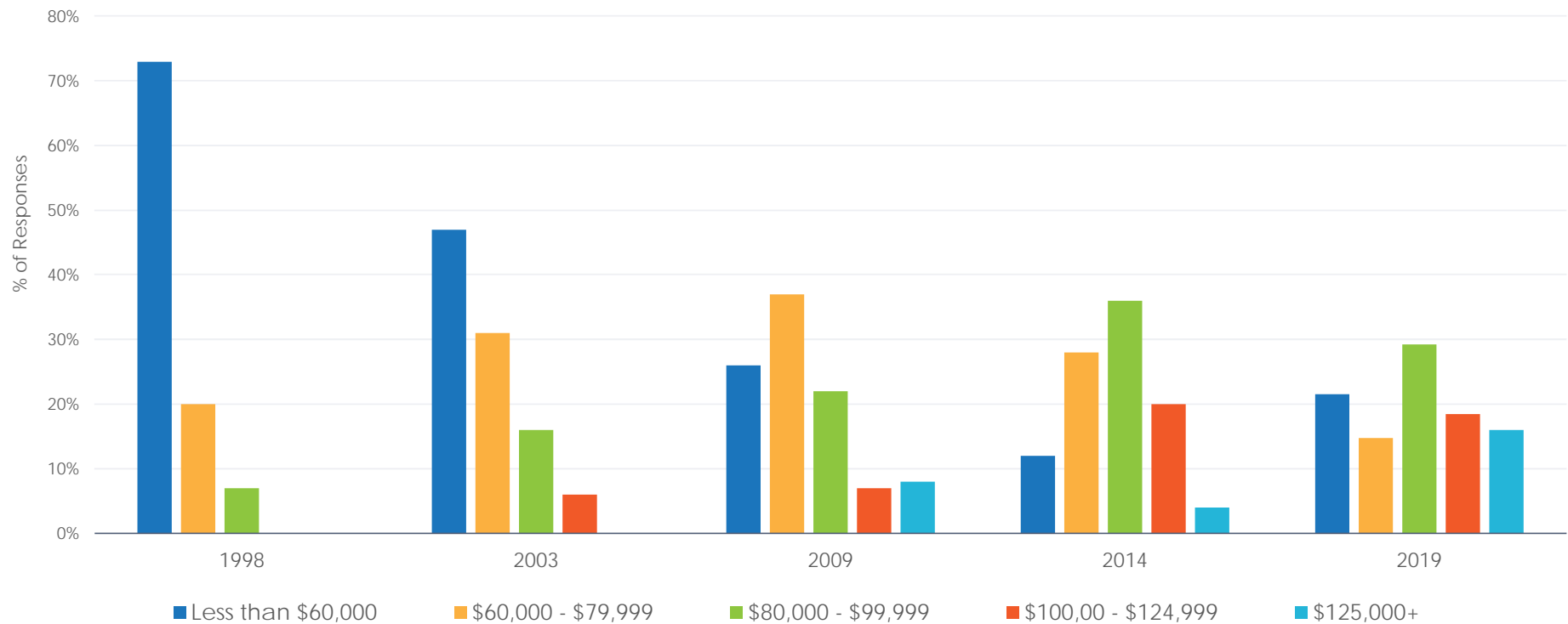
Annual salary range of TMA's Executive Director (most senior staff)

Shown in USD equivalents. (N=65)

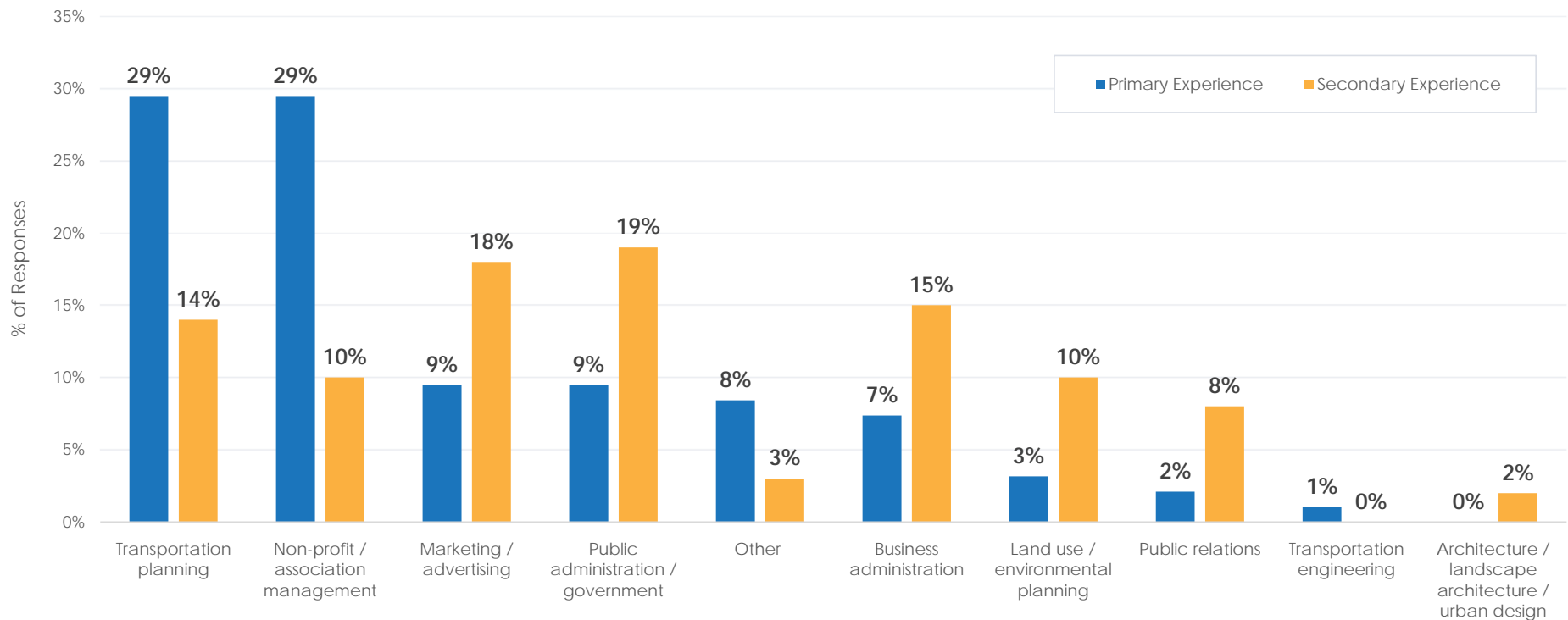


Annual salary range of TMA's Executive Director over time

Dollar values shown from the year of the survey. They are not adjusted to 2019 values.



What is the professional background of your TMA's Executive Director? (n=95)

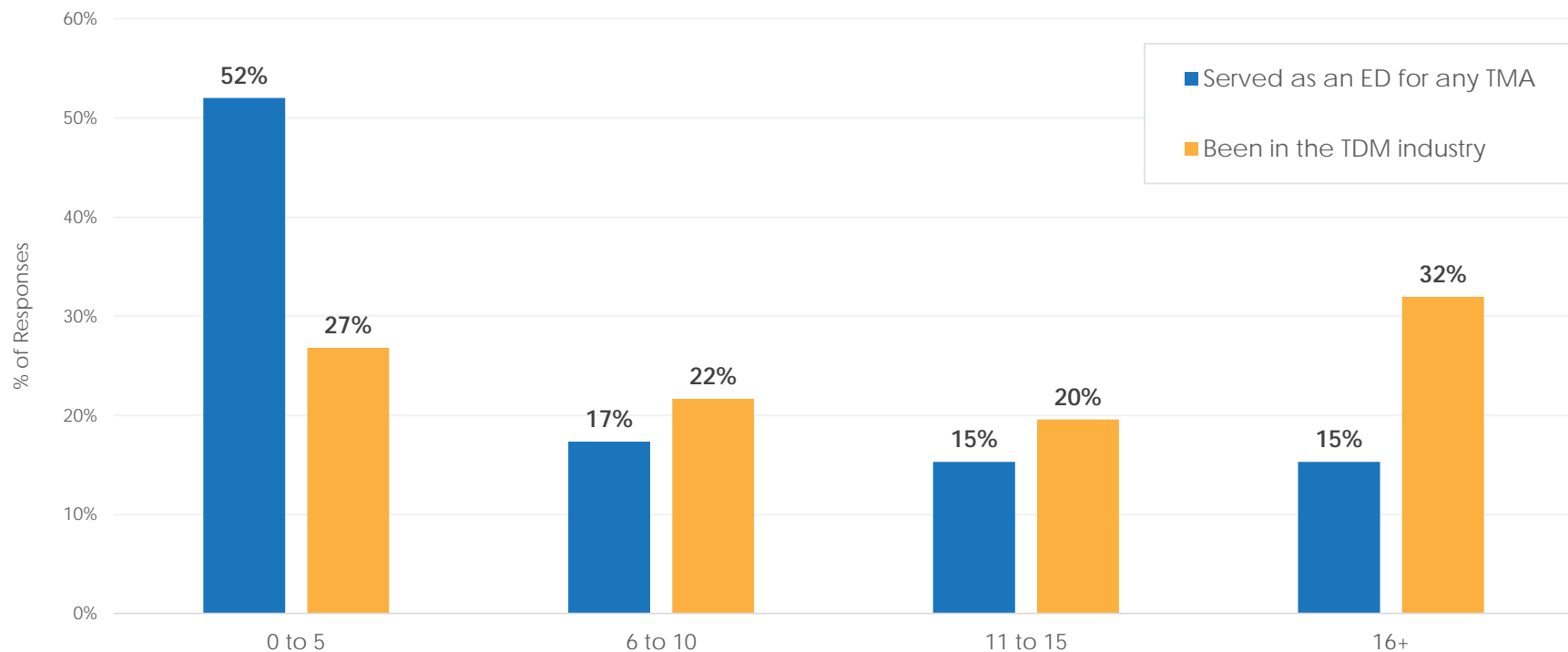


Other included: TDM, public/environmental policy, economics, and community development/outreach

How many years has your TMA's Executive Director (ED):

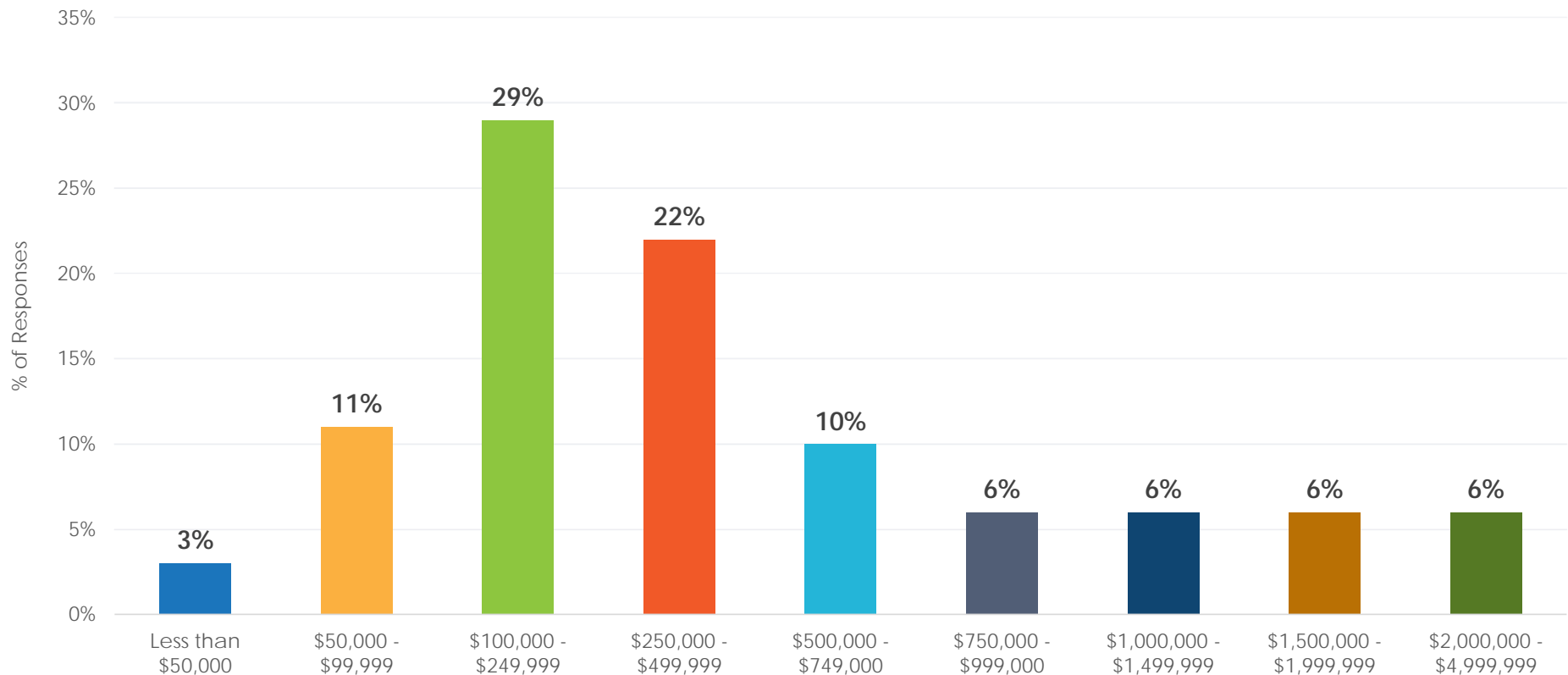
- Served as an ED for any TMA (including the current position)?
- Been in the transportation demand management(TDM) industry?

(N=97)



What were your TMA's expenditures, including labor and direct expenses, for the most recently completed financial year?

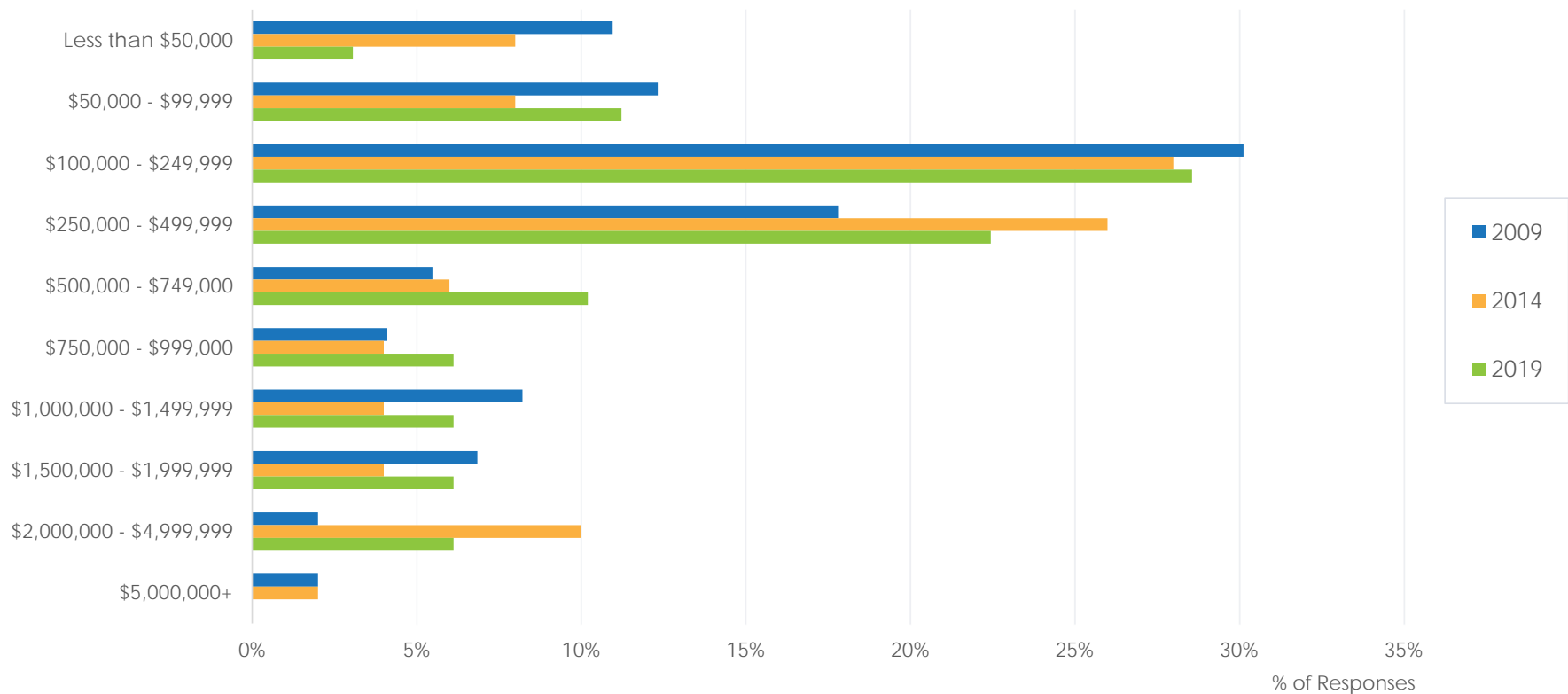
Shown in USD equivalents. (N=98)



What were your TMA's expenditures, including labor and direct expenses, for the most recently completed financial year?

Shown in USD equivalents.

Dollar values shown from the year of the survey. They are not adjusted to 2019 values.



Please estimate your expenditures breakdown for the most recently completed financial year.

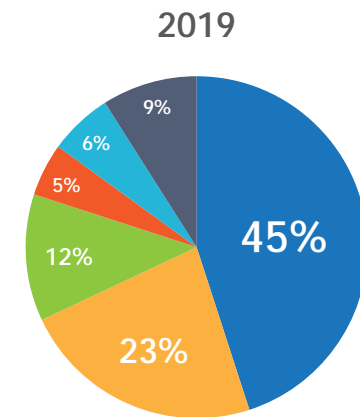
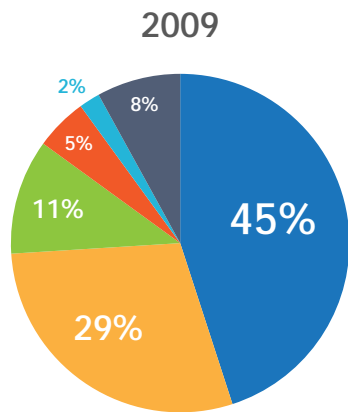
Budget Line Item	AVG %	Max %
Staffing / personnel (including direct and contract staffing, plus benefits)	45%	96%
Shuttle operations	9%	90%
Office operations (including office space, insurance, utilities, etc.)	7%	45%
Marketing and promotions	6%	25%
Member services (provided to member businesses, travelers, stakeholders)	5%	60%
Consulting services	5%	75%
Incentives	4%	65%
Professional administrative services (e.g., accounting, legal)	3%	25%
IT services / products, communications	2%	20%
Measurement and evaluation (e.g., surveys)	2%	20%
Other	1%	25%
Research	1%	20%

Please estimate the percentage of your TMA's income that is derived from the following sources for the most recently completed financial year?

Sources	AVG %	Max %
Membership dues	23%	100%
National / federal government grants	16%	90%
Local government grants	12%	100%
State government grants	9%	99%
Regional government grants	8%	100%
Fees for services	7%	90%
Developer funding agreements	6%	100%
Service contracts / brokered services	5%	80%

Sources	AVG %	Max %
Business Improvement District (or similar taxing district)	5%	97%
Other	5%	100%
Parking fees	2%	92%
Shuttle / transit revenues	2%	75%
Vanpool revenues	1%	50%
Foundation / other grants	1%	14%
Transit pass sales	0%	33%
Advertising / sponsorships	0%	10%

The percentage of your TMA’s income that is derived from the following sources for the most recently completed financial year?
Comparing change over the past decade:



- Government grants
- Membership dues
- Fees for services / service contracts
- Business Improvement District
- Developer funding agreements
- Other

- Government grants
- Membership dues
- Fees for services / service contracts
- Business Improvement District
- Developer funding agreements
- Other

FOR MEMBERSHIP DUES in 2009:

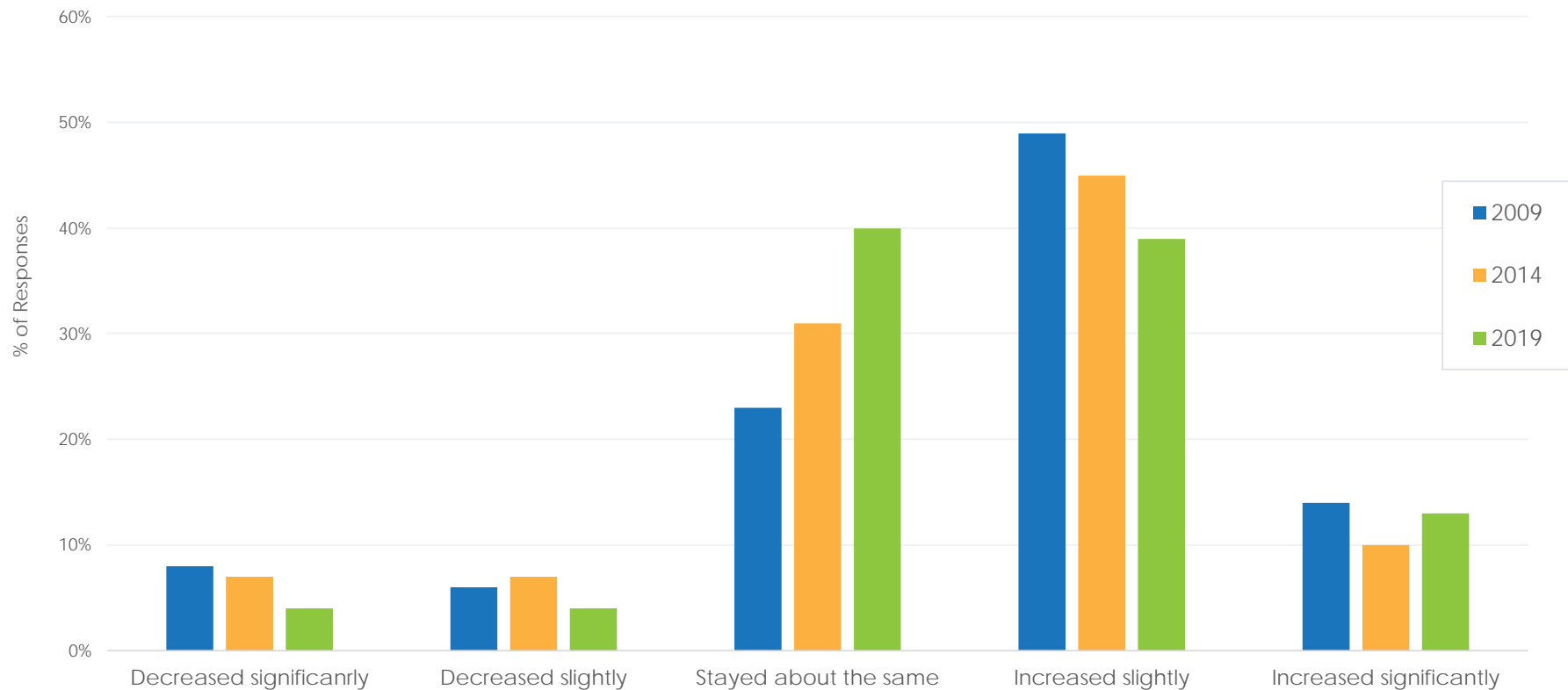
- 20% of TMAs received 90% or more of their revenue from dues
- 21% of TMAs received 1% - 10% of their revenue from due
- 58% of TMAs got at least some revenue from dues

FOR MEMBERSHIP DUES in 2019:

- 11% of TMAs receive 90% or more of their revenue from dues
- 15% of TMAs receive 1% - 10% of their revenue from due
- 51% of TMAs get at least some revenue from dues

How has your TMA's annual budget changed, if at all, over the last 3 years?

The chart below compares responses over time.

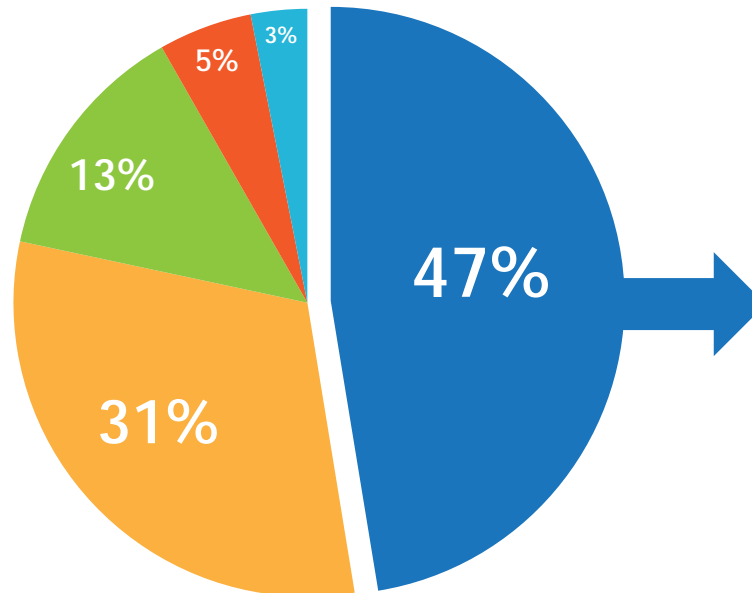


Does your TMA offer memberships to employers and other organizations in your area?

(N=97)

TMA membership

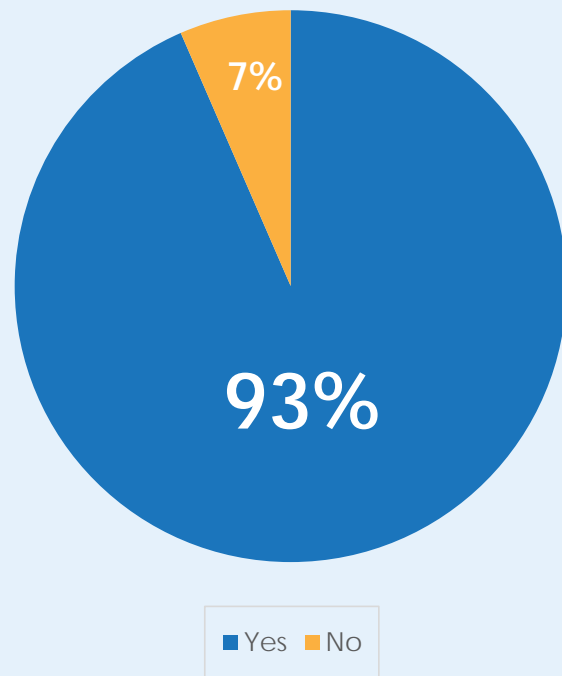
- Yes we offer organizational memberships to the TMA (i.e., organizations join the TMA)
- No all organizations in our area are automatically eligible to receive TMA services (e.g., because they are within a Business Improvement District, or similar)
- No we do not offer organizational memberships
- Other
- Yes but indirectly, all organizations that have joined our parent / partner organization (e.g., membership-based Chamber of Commerce) automatically become TMA members



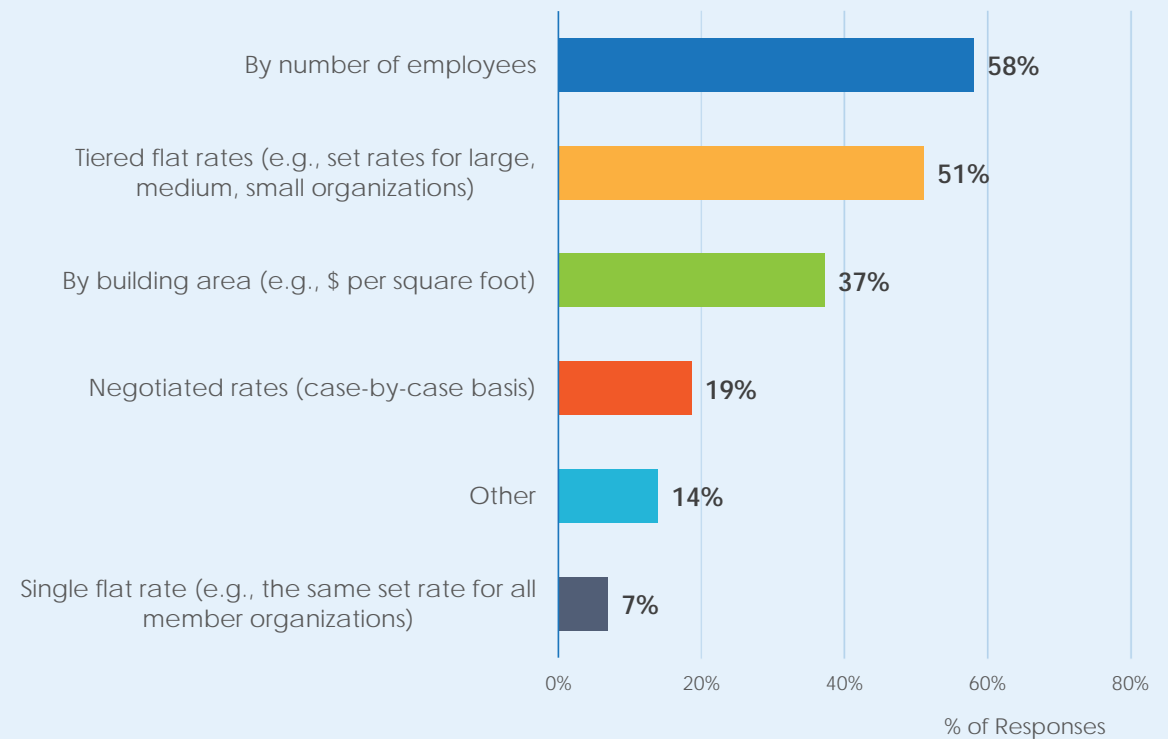
Further details for those responding "YES" included on the following page

Yes, we offer organizational memberships to the TMA

Do you charge a fee for membership? (N=46)



For those that do charge a membership fee: On what basis are annual membership dues/assessments structured? (N=43)



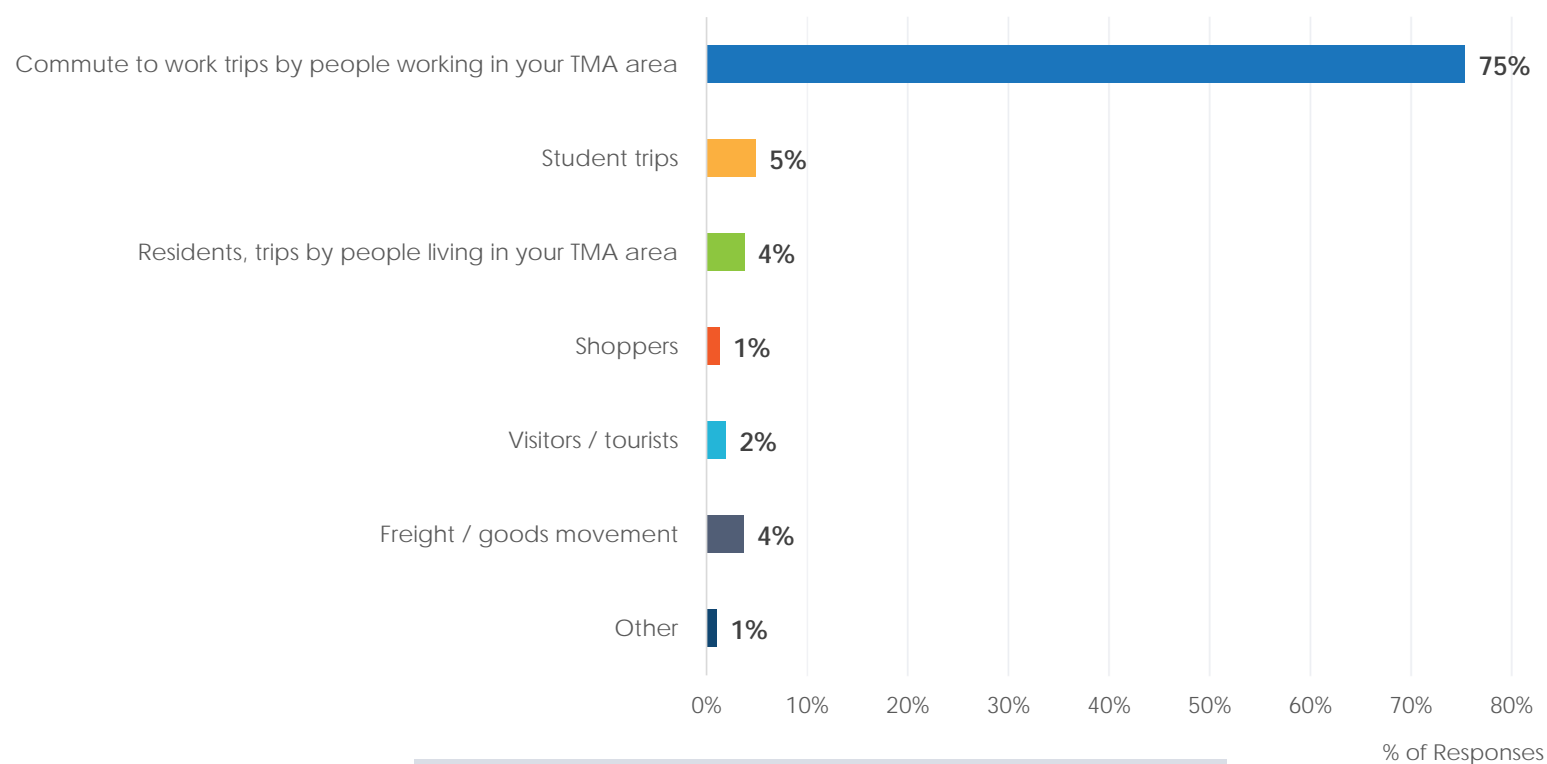
How many organizational members from each category are part of your TMA?

(N=46)



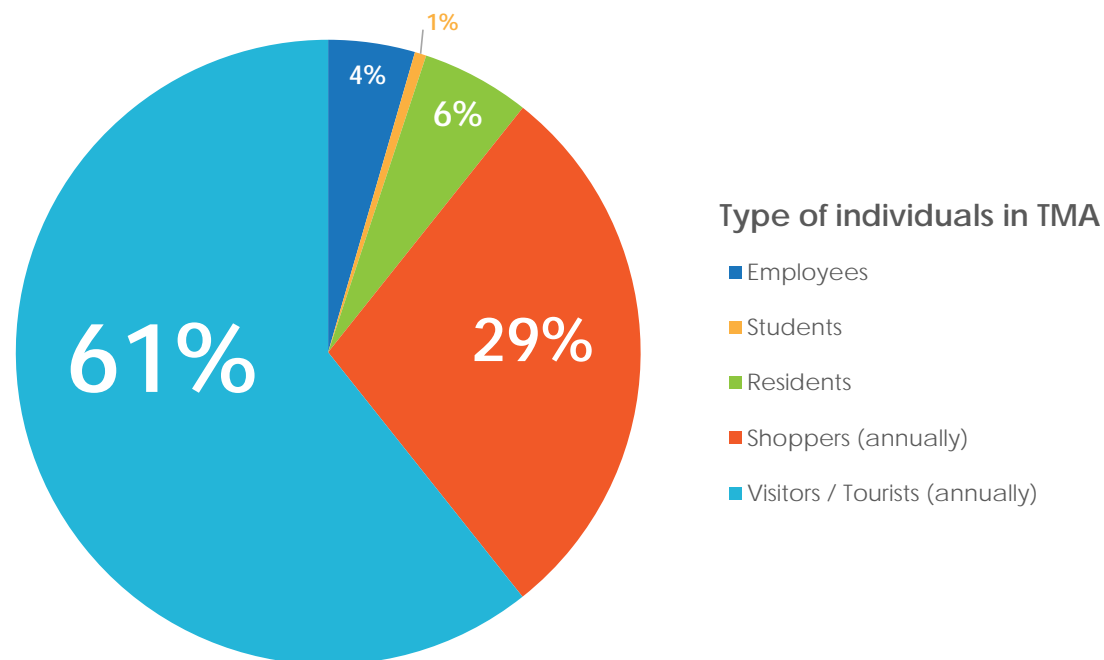
- Private business employers
- Property managers / property owners
- Government agencies (e.g., public transportation agency, department of transportation)
- Government agency employers (a TMA member as an employer)
- Non-profit organizations
- Developers
- Other

What percentage of your overall TMA program activity currently targets each of the following travel markets or types of trips?



Other included: mid-day employee trips and patient trips

Please estimate the number of individuals, in each of the following travel markets, served by your TMA?



What services are offered within your TMA area? (N=97)

Services	Provided directly by TMA	Provided by others within our TMA area
Employer transportation coordinator training	52%	16%
Rideshare matching	53%	54%
Telework program assistance	44%	28%
Subsidized transit passes	27%	46%
Direct ridesharing incentives	34%	35%
Circulator or first / last mile shuttles	30%	41%
Guaranteed Ride Home	49%	47%
Vanpool leasing / vanpool formation assistance	34%	42%
Vanpool subsidies	21%	40%
Advocacy	65%	26%
Land use / site design assistance	20%	29%
Trip reduction plans / travel plans for employers or sites	70%	18%
Employer travel surveys	75%	15%
Parking management planning	33%	25%
Promotional / marketing materials	86%	24%
Promotional events	88%	22%
Tax benefit program assistance	31%	31%
Transit pass sales	27%	47%

Services	Provided directly by TMA	Provided by others within the TMA area
Cycling program assistance / cycling training	61%	34%
Email newsletters	74%	22%
Real-time travel alerts (email, SMS)	23%	36%
Web-based mapping or journey planner	31%	46%
Personalized journey planning	57%	20%
Individualized marketing	50%	14%
Social media communications (Facebook, Twitter, blog, etc.)	78%	27%
Employer networking events	61%	26%
Sample workplace policies	33%	20%
Freight delivery plans	0%	16%
Relocation services	0%	14%
Carshare	11%	50%
Bikeshare	14%	47%
E-Scooters and similar devices	4%	35%
School TDM plans / safe routes to schools	18%	32%
Economic development services	15%	43%
Local / regional planning services	26%	49%

Which are your *most important* services? (N=97)

(Respondents noted up to three services)

Services	%
Employer travel surveys	30%
Promotional / marketing materials	27%
Trip reduction plans / travel plans for employers or sites	26%
Advocacy	24%
Circulator or first / last mile shuttles	18%
Promotional events	18%
Subsidized transit passes	13%
Employer transportation coordinator training	11%
Guaranteed Ride Home	11%
Rideshare matching	10%
Employer networking events	9%
Direct ridesharing incentives	8%
Social media communications (Facebook, Twitter, blog, etc.)	8%
Local / regional planning services	8%
Cycling program assistance / cycling training	6%
Personalized journey planning	6%
Relocation services	5%
Parking management planning	4%

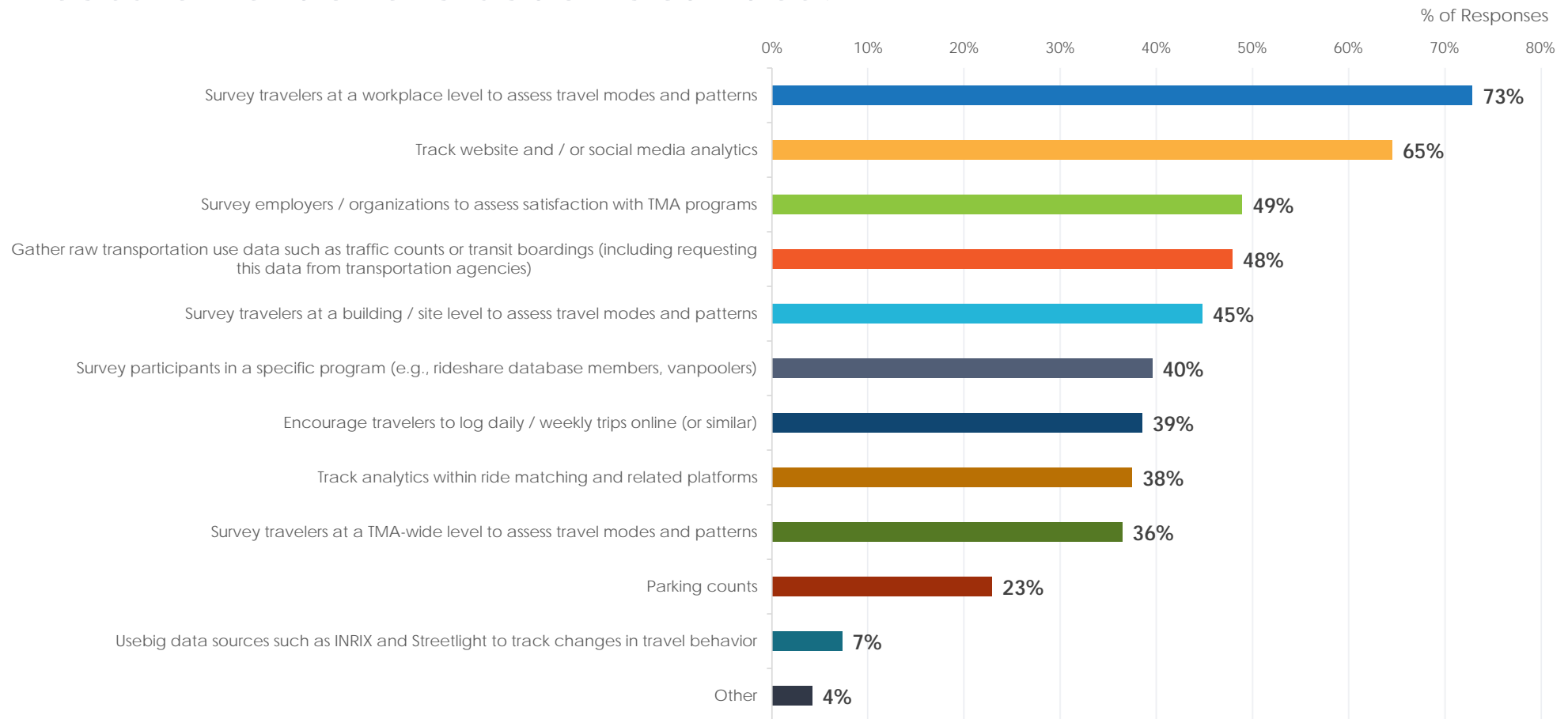
Services	%
Transit pass sales	4%
Web-based mapping or journey planner	4%
School TDM plans / safe routes to schools	4%
Vanpool leasing / vanpool formation assistance	3%
Land use / site design assistance	3%
Real-time travel alerts (email, SMS)	2%
Economic development services	2%
Telework program assistance	1%
Vanpool subsidies	1%
Sample workplace policies	1%
Bikeshare	1%
Tax benefit program assistance	0%
Email newsletters	0%
Individualized marketing	0%
Freight delivery plans	0%
Carshare	0%
E-Scooters and similar devices	0%

Comparing services offered by TMAs over the years

The table below shows the rank order of services offered by the most TMAs across six years of the TMA Survey. For example, promotional events were the service offered by the most TMAs in the 2019 and 1998 surveys.

Services	2019	2014	2009	2003	1998	1993
Promotional events	1	2	3	4	1	2
Promotional / marketing materials	2	1	1	2	3	3
Social media communications (Facebook, Twitter, blog, etc.)	3	12	25	-	-	-
Employer travel surveys	4	4	2	-	-	7
Email newsletters	5	3	6	-	-	-
Trip reduction plans / travel plans for employers or sites	6	15	4	9	7	6
Advocacy	7	9	8	6	2	1
Cycling program assistance / cycling training	8	5	10	10	-	-
Employer networking events	9	8	12	-	-	-
Personalized journey planning	10	23	19	-	-	-
Rideshare matching	11	7	5	3	4	5
Employer transportation coordinator training	12	18	9	12	6	9
Individualized marketing	13	14	19	-	-	-
Guaranteed Ride Home	14	11	7	5	5	8
Telework program assistance	15	13	20	13	-	-
Direct ridesharing incentives	16	6	18	11	-	-
Vanpool leasing / vanpool formation assistance	17	17	22	7	8	4
Parking management planning	18	21	13	14	9	10
Sample workplace policies	19	19	-	1	-	-
Tax benefit program assistance	20	22	17	8	-	-

Does your TMA conduct any of the following measurement or evaluation activities?



Describe the accuracy of the following statements as they pertain to your TMA:

Budget Line Item	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
Our funding sources are stable (i.e., at least 60% of your TMA's funding automatically renews or is very likely to be renewed)	34%	39%	8%	11%	8%
Our city / local jurisdiction is strongly supportive of the TMA	46%	35%	12%	6%	1%
Our MPO / regional government is strongly supportive of the TMA	40%	35%	18%	3%	3%
Our state government is strongly supportive of the TMA	17%	27%	39%	9%	9%
Our national government (directly, or via a regional office of that body) is strongly supportive of the TMA	4%	17%	60%	12%	7%
TMA Board members are actively involved in supporting the TMA	35%	38%	19%	7%	0%
The TMA's local-area employers and similar partners believe the TMA offers high-value services	25%	46%	19%	9%	0%
The TMA's service area suffers from significant transportation and / or access challenges	43%	36%	11%	8%	2%
The TMA's service area is growing rapidly / has a lot of economic development activity	54%	28%	11%	7%	0%
The TMA's staff is thoroughly trained and prepared	51%	39%	5%	4%	0%

Please enter any additional information about your TMA

A sample of the comments provided are included below.

We are a unique TMA, that actually has vans that it owns and leases to groups. This model does not fit into the classic federal and state funding connection with local COGs. The funding pipeline does not allow outside the box thinking or spending, consequently we have a very cookie cutter approach to TDM in our area.

[We are] facing a major challenge in recruiting the workforce and retaining employees. Although turnover is increasing each year and the number of clients and mandates is increasing, the shortage of labor makes it difficult to operationalize the organization.

The Legacy Area is a fast-growing employment center in a suburban area, so we are spending a lot of time/effort working with transit to strengthen services and [local government] to improve infrastructure for mobility options.

We have 18+ independent shuttles operating in our district.

We are funded entirely by the local government transit budget and that money originates from parking fees at garages and lots, along with district taxes paid by residents and commercial properties. [Our local] law states that the money collected from these sources must stay in the TMA/District where it is collected.

I would say our TMA scope is on the verge of some large-scale changes in scope and impact when it comes to advocacy and the way we deliver our services. Our relationships in the community are strong and our reputation continues to deliver for our organization, but the industry is rapidly changing and keeping a small staff up to speed and protected from turnover is a tricky task.

We're participating, and asked more frequently to participate, in local, regional and state committees addressing climate and energy plans.

We are not officially a TMA but provide many of the same services as a TMA. Our one-person transportation staff works with staff of a district-wide non-profit community development corporation to provide services. Much of our transportation work is guided by a district-wide transportation plan which recommends district-wide TDM. The transportation staff convenes a working group with representatives from all major employers in the district. Our MPO provides a carpool matching platform that we work with our employers to set up and market.

[We] are located in the largest biotech hub in the world. For two decades, [we have] operated a multimodal commuter program for employees. However, the area we are located is experiencing rapid growth and the businesses are mainly small to medium and unable to create their own commuter programs. The area is also not supported by public transit. So, [we are] in the process of experimenting with ways to broaden our commuter programs to include other businesses in a TMA-like structure.

Programming (and funding) has been diversified over the past decade. Because of the TMA's historically strong community connections and involvement, we now conduct a number of transportation safety programs (bike, pedestrian, teen driving, senior driving), and environmental education programs (air quality, alternative fuel vehicles, etc.) in addition to standard TDM.