Voices of the Region
Survey Results

National Capital Region
Transportation Planning Board

Agenda Item 9

February 17, 2021

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Survey Methodology

• Representative survey of the region
• Target of 2,000 completed surveys
• 200 in each of ten sub-areas
• Randomly-drawn address-based sample
• Three mailed contacts with web link included; $1 pre-incentive
• Achieved 2,407 completes
• Final response rate of 11.9%
• Margin of error of +/-2.5% at 95% confidence.
Survey Results
Changes in General Travel
S1Q1. Since the beginning of the COVID-19 pandemic, how much have your daily travel habits changed?

Two-thirds of respondents report their daily travel habits have changed a lot since the beginning of the COVID-19 pandemic.

(n = 2,407)
CAR USERS

Prior to COVID, 81% of respondents used a car to travel to work at least three times a week

N = 2,407

S1Q2/S1Q4/S1Q8. Prior to the COVID-19 pandemic, how often on average did you drive or ride in a car/take public transportation/ride a bicycle?

Prior to COVID, 81% of respondents used a car to travel to work at least three times a week.
Mode Changes Since the Beginning of the Pandemic

S1Q3/S1Q5/S1Q7/S1Q9. Since the beginning of the COVID-19 pandemic, how much has your car use/use of public transportation/walking/biking changed?
S1Q6. One year after the COVID-19 pandemic is over, which of these changes would make you more likely to use public transportation? (check all that apply)

- More frequent cleaning of buses or train cars
- More spacing between people on buses or train cars
- More frequent service
- Plastic barriers to prevent the spread of COVID-19
- Riding a bus with limit stops
- Other

Other responses include: Available COVID-19 vaccine, mandatory mask-wearing and temperature checks, open windows and better ventilation.
S1Q10. Please think about your travel habits one year after the COVID-19 pandemic is over. Do you expect that your travel habits will return to your previous pattern before the pandemic?

38% of all respondents expect to have a change to their travel habits one-year after the pandemic.
Expected Changes to Travel One Year Post-Pandemic

**S1Q11. How do you expect your travel will be different once the pandemic is over? I expect I will... (Select all that apply)**

- **Drive or ride in cars**
  - LESS than before the pandemic: 47%
  - MORE than before the pandemic: 34%

- **Use public transportation**
  - LESS than before the pandemic: 38%
  - MORE than before the pandemic: 13%

- **Walk**
  - LESS than before the pandemic: 3%
  - MORE than before the pandemic: 53%

- **Bike**
  - LESS than before the pandemic: 3%
  - MORE than before the pandemic: 26%

N = 834
S1Q17/S1Q18. Before/During the COVID-19 pandemic, how did you commute/are you commuting to work or school? Select all modes of transportation that you used/use at least once a week. 

S1Q19. How do you expect to commute to work or school one year after the COVID-19 pandemic is over? Select all modes of transportation that you expect to use at least once a week.

* 5% of respondents do not know what their plans are for after the pandemic

n = 1,711
S1Q20. If given the choice to return to a work location once the COVID-19 pandemic is over, would you prefer to…?

S1Q21. How often would you want to telework?

Preferences of Current Telecommuters

Return to your work location full-time

Telework full-time

Telework some days and commute to your work location some days

How often would you want to telework? (n = 685)

- 8% 1 day
- 41% 2 days
- 49% 3-4 days
- 2% 5 days

(n = 1,073)
**S1Q16. Are you considered an essential worker who is required to travel outside your home for a job in the following industries (check all that apply)?**

- **Government**: 43%
- **Other**: 33%
- **Health care**: 15%
- **Grocery store**: 5%
- **Public works**: 4%

Of respondents self-reported as essential workers: 43%

Non-essential workers: 57%
S1Q18. During the COVID-19 pandemic, how are you commuting to work or school? Select all modes of transportation that you currently use at least once a week.
Online Shopping During the Pandemic

**S1Q22.** Since the beginning of the COVID-19 pandemic, how have your online shopping habits changed? (Please only consider items you order for delivery at your home, not curbside pick-up).

**S1Q23.** One year after the COVID-19 pandemic is over, what do you expect your online shopping habits to be like?

70% of respondents indicated that their online ordering increased

58% of respondents report that they are likely to continue with the current online shopping habits

<table>
<thead>
<tr>
<th>Change in Online Ordering</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>4%</td>
</tr>
<tr>
<td>Less</td>
<td>4%</td>
</tr>
<tr>
<td>Same</td>
<td>23%</td>
</tr>
<tr>
<td>Increased a little</td>
<td>31%</td>
</tr>
<tr>
<td>Increased a lot</td>
<td>39%</td>
</tr>
</tbody>
</table>
Improvements to the Transportation Infrastructure
Changes to Bus Stop or Station - by Transit User Status

S2Q1. Which of the following changes to the bus stop or bus station would make you more likely to take a bus? I would be more likely to take the bus if the bus stop... (Choose up to 3 options)

*Each respondent could select up to three options
S2Q2. Now please think about the trip aboard the bus. Which of the following improvements to the bus ride experience would make you more likely to take the bus? I would be more likely to take the bus if... (Choose up to 3 options)
Changes to Rail transit – by Transit User Status

“Train” defined as Metrorail, commuter rail, other trains

**S2Q3. Which of the following improvements would make you more likely to take rail transit (Metrorail, commuter rail, other trains)? I would be more likely to take rail transit if... (Choose up to 3 options)**

- Trains came more frequently
- The fare was cheaper
- Trains were less crowded
- There was a shuttle or bus line to get me to the train station
- Waiting for the train felt safer
- Waiting for the train was more comfortable
- Navigating the station was easier
- Other
- No change would make me more likely to take rail transit [EXCLUSIVE]

Other responses include:
- Cheaper parking,
- Proximity of station,
- Cleanliness

Non-regular transit user (n = 1,890) vs. Regular transit user (n = 517)
Changes to Encourage Walking, Biking to Transit - by Age

**S2Q4. Which of the following improvements would make you more likely to walk, bike or take an e-powered or mobility device to the train station or bus stop?**

I would be more likely to walk, bike, or use an e-powered or mobility device to the train or bus if... (Choose up to 3 options)

- Safe crossings the way there: 36% (30 and under), 42% (31-64), 27% (65+)
- Route was quicker or more direct: 27% (30 and under), 25% (31-64), 8% (65+)
- E-bikes/e-scooters available to get to/from the station: 16% (30 and under), 16% (31-64), 11% (65+)
- My route to the train/bus had adequate lighting: 13% (30 and under), 11% (31-64), 4% (65+)
- There were more bike lockers at the station: 25% (30 and under), 16% (31-64), 8% (65+)
- My route to the train or bus was more shaded: 20% (30 and under), 11% (31-64), 4% (65+)
- Other responses include: Bike lanes, more local transit options, safety

- Other: 5% (30 and under), 5% (31-64), 5% (65+)
- Other: 23% (30 and under), 47% (31-64), 75% (65+)
- No change would make me more likely to walk or bike to the train or bus: [EXCLUSIVE]
S2Q6. Which of the following improvements would make you more likely to use a bicycle? I would be likely to bike more if... (Choose up to 3 options)

- I had access to a bike
- There were bike lanes or trails near my home
- Bicycle lanes were separated from vehicles by a barrier
- There was safe bike parking at my destination
- There was a shower or locker room at work/school
- Vehicle speeds were lower
- Bicycle lanes and routes were more direct and complete
- Other

Other responses include: Physically unable, better road conditions

No change would make me more likely to walk or bike to the train or bus [EXCLUSIVE]
Broader Opinion Questions
Support for Sidewalk and Street Uses

S1Q24. One year after the COVID-19 pandemic is over, would you support the continued use of street space/parking space for these kinds of purposes?

S2Q8. Do you support constructing more or wider sidewalks and bike lanes if it meant a reduction in parking availability?

S2Q7. Do you support providing ride-hailing zones for pick-up and drop-off on the street if it meant a reduction in parking availability?

S2Q12. To avoid congestion and make bus trips faster, would you support dedicating a travel lane for mostly bus use?

S2Q13. To enable buses to travel in their own lane, would you support the removal of a lane of on-street parking?
Impact of Traffic Congestion on Quality of Life

**S2Q11. How big a concern is traffic congestion to you personally?**

<table>
<thead>
<tr>
<th>Core (n = 721)</th>
<th>Inner Suburbs (n = 741)</th>
<th>Outer Suburbs (n = 944)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Significant concern and it impacts the quality of my life</td>
<td>27%</td>
<td>46%</td>
</tr>
<tr>
<td>Somewhat a concern and it impacts my life a little</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>Bit of a concern</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>Not a concern because I have adjusted to it</td>
<td>13%</td>
<td>8%</td>
</tr>
<tr>
<td>Not a concern because I don't experience much congestion</td>
<td>14%</td>
<td>9%</td>
</tr>
</tbody>
</table>
Public Opinion of Climate Change

**S3Q2.** How much do you agree or disagree that human actions contribute to at least some climate change?

**S3Q1.** How much do you agree or disagree with the following statement? Elected officials need to consider impacts of climate change when planning for transportation in the future.
**S3Q4. How might the availability of driverless cars benefit you or others in the Washington region? (Choose up to 3 options)**

- Better traffic flow/reduced congestion: 38%
- Not needing to park (a driverless vehicle can drop me off and park itself): 38%
- Safer/reduced crashes: 33%
- Supporting travel for persons with disabilities: 32%
- Fewer vehicle emissions: 27%
- Doing other things in the vehicle instead of actively driving: 24%
- Being connected to Wifi while in the vehicle: 6%
- Other: 2%
- I do not expect any benefits: 24%

33% of low-income respondents (n = 223) reported that they do not expect any benefits compared to 22% of non-low-income respondents.

N = 2,407, Respondents identified up to 3 options
**Concerns about Driverless Cars**

**S3Q5. What concerns, if any, do you have about driverless cars? (Choose up to 3 options)**

- Safety of pedestrians and bicyclists: 52%
- Safety of other drivers: 49%
- Liability for accidents: 45%
- Cybersecurity concerns: 33%
- Cost: 33%
- They may not equally be available to everyone: 25%
- May discourage travel options such as public transportation and biking: 13%
- Other: 3%
- No concerns: 6%

17% of low-income respondents (n = 246) have no concerns compared to 5% of not low-income respondents (n = 5,541).
Transportation Equity
S3Q6. How well do you feel the region’s current transportation system meets your travel needs?

Transportation System Meeting Needs – by Region

- **Core (n = 721)**
  - Meeting Needs: 75%
  - Neutral: 15%
  - Not Meeting Needs: 10%

- **Inner Suburbs (n = 740)**
  - Meeting Needs: 55%
  - Neutral: 25%
  - Not Meeting Needs: 20%

- **Outer Suburbs (n = 944)**
  - Meeting Needs: 38%
  - Neutral: 33%
  - Not Meeting Needs: 30%

- **Region-wide (n = 2,407)**
  - Meeting Needs: 55%
  - Neutral: 24%
  - Not Meeting Needs: 21%
### Transportation System Meeting Needs – by Income

**S3Q6. How well do you feel the region’s current transportation system meets your travel needs?**

<table>
<thead>
<tr>
<th></th>
<th>Low-income (n = 102)</th>
<th>Not low-income (n = 2,108)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poorly</td>
<td>11%</td>
<td>22%</td>
</tr>
<tr>
<td>Neither well nor poorly</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>Well</td>
<td>64%</td>
<td>55%</td>
</tr>
</tbody>
</table>

Low-income respondents feel that the current transportation system meets their travel needs.
**S3Q6. How well do you feel the region’s current transportation system meets your travel needs?**

**MEETING NEEDS**
- Very well or Somewhat well
  - Under 30 (n = 206): 72%
  - 31-64 (n = 1,563): 53%
  - 65+ (n = 600): 44%

**NOT MEETING NEEDS**
- Somewhat poorly or Very poorly
  - Under 30 (n = 206): 16%
  - 31-64 (n = 1,563): 24%
  - 65+ (n = 600): 21%

**NEUTRAL**
- 12%
$S3Q7$. **Do you experience any of the following barriers to getting where you need to go from where you live? (Choose up to 3)**

- Public transportation does not come frequently enough: 28%
- Public transportation requires too many transfers: 23%
- Public transportation does not get me to my destination on time: 21%
- It feels unsafe to walk/bike: 19%
- I can’t afford tolls to avoid traffic congestion: 15%
- There are no trails near my home or work: 14%
- Public transportation is too expensive for me: 11%
- I don’t feel safe crossing the street: 11%
- Other: 6%
- I don’t experience any transportation barriers [EXCLUSIVE]: 33%

17% of not low-income respondents ($n = 3,680$) expressed that the cost of tolls was a barrier to getting where they need to compared to 5% of low-income respondents ($n = 170$).
S3Q8. How well do you feel your transportation needs and concerns are being addressed by decision makers?

Needs Addressed by Decision-Makers – by Income

- Low-income (n = 102)
  - Very poorly: 9%
  - Somewhat poorly: 7%
  - Neither well nor poorly: 40%
  - Somewhat well: 29%
  - Very well: 15%

- Not low-income (n = 2,108)
  - Very poorly: 11%
  - Somewhat poorly: 18%
  - Neither well nor poorly: 39%
  - Somewhat well: 25%
  - Very well: 6%
### Participation in Public Meetings

**S3Q9. I would be more likely to participate in public meetings about transportation if:** (Choose up to 3)

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I could obtain information and provide feedback online</td>
<td>45%</td>
</tr>
<tr>
<td>I could call in to listen or speak</td>
<td>35%</td>
</tr>
<tr>
<td>The meetings were held in my neighborhood</td>
<td>25%</td>
</tr>
<tr>
<td>I could attend in person on nights or weekends</td>
<td>15%</td>
</tr>
<tr>
<td>More people from my community attended</td>
<td>12%</td>
</tr>
<tr>
<td>The meetings were held near public transportation</td>
<td>7%</td>
</tr>
<tr>
<td>There were a translator or materials in my language</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
<tr>
<td>No changes would make me more likely to participate [EXCLUSIVE]</td>
<td>31%</td>
</tr>
</tbody>
</table>

N = 2,407, Respondents identified up to 3 options
Future Transportation Investments

The survey included a broad open-ended question which asked respondents to consider:

What transportation investments should we make today that future generations will thank us for tomorrow?
What transportation investments should we make today that future generations will thank us for tomorrow? [Top primary and secondary codes]
Our metro access/plan in the region is quite inconvenient when major transfers can only happen at the Metro Center... if there are more sub station connections... it would provide more access.

Invest heavily in infrastructure that supports electric vehicles. Need more free, public charging stations, and dedicated EV parking spots as well as incentives. Invest in fully electric buses and upgrade routes.

Improve road infrastructure including aging major bridges, deteriorating road surfaces, and storm water effects on roads (including washouts/temporary flooding.)

Building more bike lanes, reducing car dependency, livable neighborhoods, density, expanding green space

Expanding roads in congested and soon to be congested (ehem, Potomac yard with Amazon) areas now before it gets too bad.

Anything we can do to reduce our carbon footprint would be appreciated.

Extend rail services beyond the current metro region in areas not yet developed for new subdivisions.

**S3Q10.** What transportation investments should we make today that future generations will thank us for tomorrow? [Top secondary Codes and illustrative quotes]
Thank you
Respondent Age Distribution

D5. In what year were you born?
D7. Which of the following best describes you? Please select all that apply.

Respondent Racial/Ethnic Background
Respondent Income Distribution

**D9.** What was your total household income from all sources in 2019 before taxes?

- Less than $25,000: 7% (Survey) 10% (ACS)
- $25,000 to 49,999: 10% (Survey) 13% (ACS)
- $50,000 to 74,999: 14% (Survey) 14% (ACS)
- $75,000 to 99,999: 15% (Survey) 12% (ACS)
- $100,000 to 149,999: 21% (Survey) 20% (ACS)
- $150,000 to 199,999: 15% (Survey) 13% (ACS)
- $200,000+: 19% (Survey) 18% (ACS)
### Employment Before and During Pandemic

**S1Q13.** Before the COVID-19 pandemic, what was your employment situation? (Select all that apply)

**S1Q14.** What is your current employment situation during the COVID-19 pandemic? (Select all that apply)

<table>
<thead>
<tr>
<th>Employment Status</th>
<th>Pre-Pandemic</th>
<th>During the pandemic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working full time</td>
<td>71%</td>
<td>64%</td>
</tr>
<tr>
<td>Working part time</td>
<td>8%</td>
<td>9%</td>
</tr>
<tr>
<td>Student</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Stay at home parent or caretaker</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Unemployed or furloughed</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Retired</td>
<td>16%</td>
<td>17%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>

*N = 2,407*
S2Q1. Which of the following changes to the bus stop or bus station would make you more likely to take a bus? I would be more likely to take the bus if the bus stop... (Choose up to 3 options)
S3Q1. How much do you agree or disagree with the following statement? Elected officials need to consider impacts of climate change when planning for transportation in the future.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Strongly or Somewhat Agree</th>
<th>Somewhat Agree</th>
<th>Neutral</th>
<th>Strongly or Somewhat Disagree</th>
<th>Somewhat Disagree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 30 (n = 206)</td>
<td>92%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2%</td>
</tr>
<tr>
<td>31-64 (n = 1,563)</td>
<td>82%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>6%</td>
</tr>
<tr>
<td>65+ (n = 600)</td>
<td>82%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>13%</td>
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