IV

NVTA's TransAction

Transportation Action Plan for Northern Virginia

NVTA TransAction 2016 Update:

Tracking Changes in Transportation Attitudes and Priorities

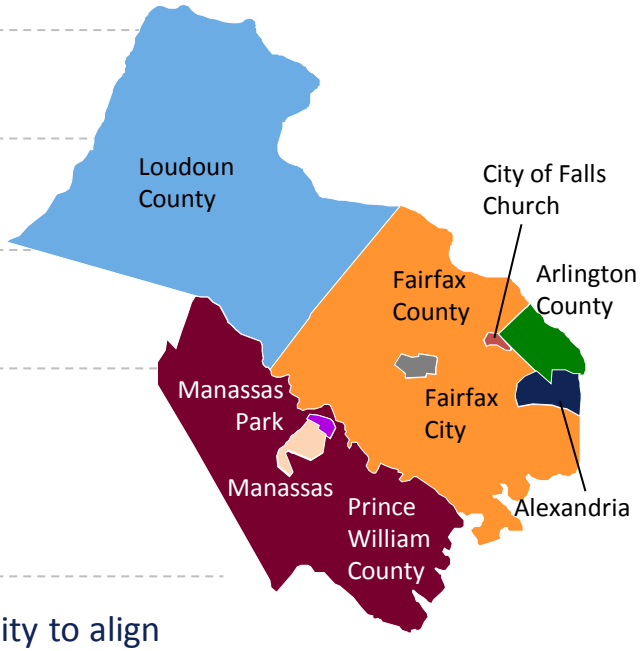
February 9, 2017

HEART & MIND STRATEGIES

NVTA's TransAction

Methodology

AUDIENCE	**Residents in NVTA member jurisdictions of Northern Virginia** n=606
DATES	December 12-21, 2016
MODE	Online Survey
LENGTH	8 minutes
GEOGRAPHY	**Northern Virginia** Arlington County, Fairfax County, Loudoun County, Prince William County, Alexandria, Fairfax City, City of Falls Church, Manassas, Manassas Park
DATA WEIGHTING	All 2016 data weighted by gender and ethnicity to align with 2015 data.



Denotes significant differences between 2015 and 2016

EXECUTIVE SUMMARY

Executive Summary

- Northern Virginia residents' interest in and knowledge of transportation issues is on the rise since 2015.
- Quality of life in the context of transportation continues to be moderate, receiving a 6 out of 10 rating.
  - The factor that most impacts quality of life for Northern Virginia residents is "reducing traffic congestion and improving transportation options."
- The primary information sources continues to include TV, print and radio but, social media has increased significantly as a source of information (from 24% up to 31% as a source for recent information.)
- One quarter of residents report having heard something positive about transportation in the Northern Virginia region and one half have heard something negative. These trends are in line with 2015.
- Awareness of NVTA is on par with that of 2015, while awareness of TransAction has nearly doubled in the past year (from 8% to 15% in 2016).

Executive Summary

- Northern Virginians who drive to work will tolerate some congestion for their commute, but current congestion is already close to acceptable levels.
- While the impact of traffic flow and congestion on residents' lives has decreased slightly since 2015 (from 59% to 53%), it remains the most impactful factor.
  - It is of particular concern to Prince William residents, those with incomes of $100K or more, and those who have not lived in the region most of their lives.
- Since 2015 the impact of transportation options and transportation infrastructure has increased up from 13% to 17%, though not significantly.
- Regarding transportation infrastructure, 68% of residents perceive the region is doing a good job, a 25-point uptick from 2015.

Executive Summary

- Importance of each regional transportation priority remains on par with 2015, except for new public transportation options where a significant increase in importance is noted.
- Performance on these same priorities has undergone a slight positive shift with a few areas of significant improvement. Those include: predictable trip times, increased routes and locating new growth near transit.
- Among recent transportation projects, building the Silver Line remains most important to residents.
- Among potential projects, upgraded arterial roads and rail lines top the list.
- Ratings of both Northern VA and NVTA's performance with regard to planning and implementing transportation solutions remain unchanged.

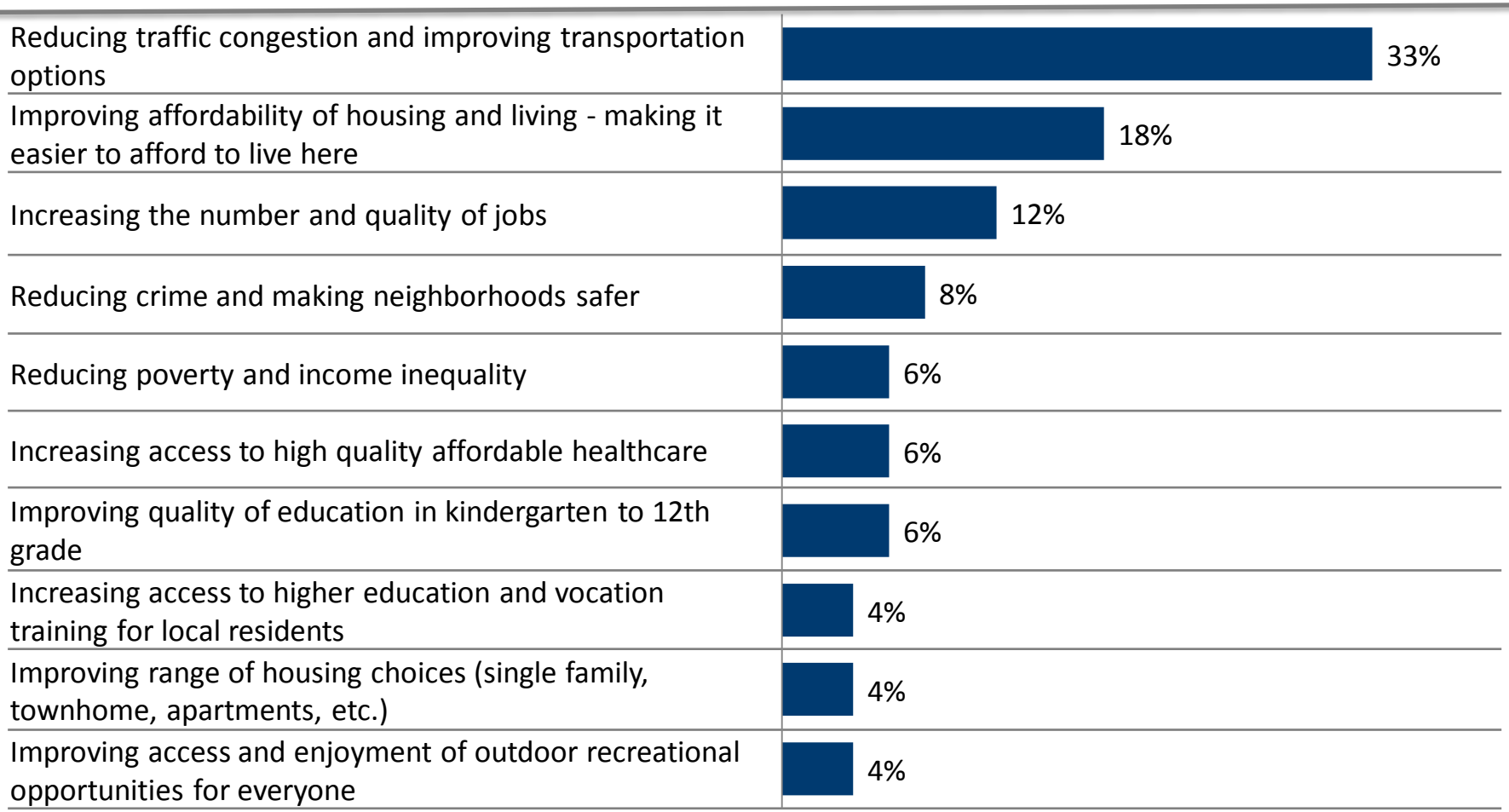
Executive Summary

- In terms of communication, a focus on reducing travel time continues to best motivate interest and support among residents.
- When asked to prioritize investment, residents allocate the majority to roads, followed by rail/transit and finally by measures to incentivize less driving at peak times.
- Self-driving cars are viewed as “scary” or “dangerous” with a smaller group of residents also categorizing them as “good.”
- Uber and Lyft are the most frequently used alternatives to owning a car. Furthermore, residents expect usage to increase in the next year.
- On average, three quarters of Northern Virginia residents conduct online shopping once a month or more.

KEY FINDINGS

One-third of residents consider "Reducing traffic congestion and improving transportation options" the most impactful factor on their quality of life.

Significant Impact on Quality of Life



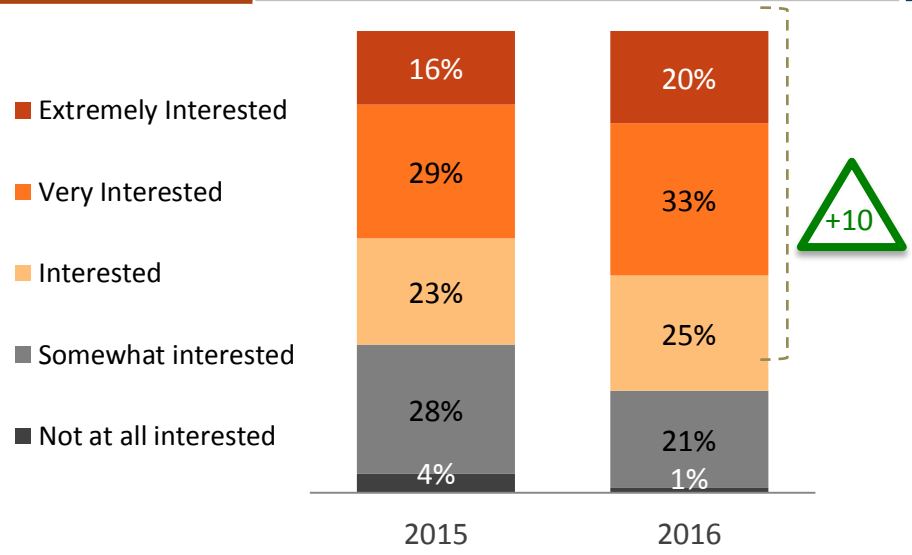
BASE: ALL RESPONDENTS (n=606)
Q156 People in different regions of the country mention many factors that contribute to their quality of life. Thinking about the quality of life specifically in the Northern Virginia region, please identify which one of the following factors has the most significant impact on the overall quality of life for you personally.

NVTA's TransAction

Since 2015, significantly more Northern VA residents are interested in and informed about transportation issues - nearly 6 in 10 are Influencers.

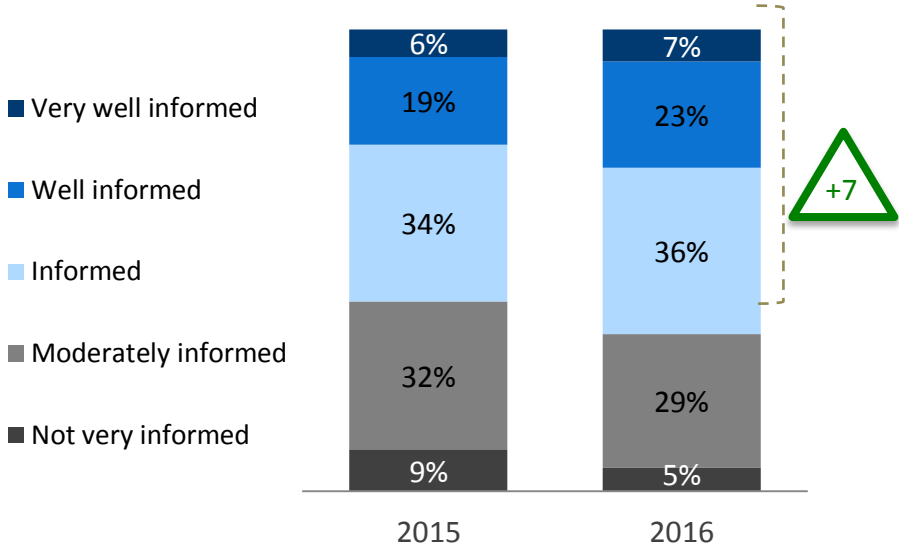
Interest

Issues related to Transportation in Northern Virginia



Informed

Issues related to Transportation in Northern Virginia



INFLUENCERS
(Interested AND Informed)

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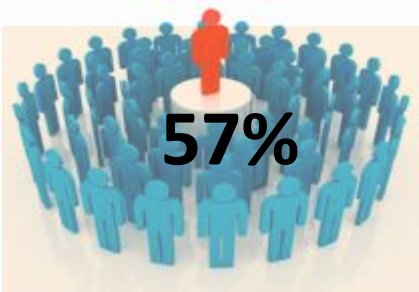


Most Likely to Be Influencers:

87% Aware of TransAction
75% Aware of NVTA
66% Loudoun County
65% Heard NoVa Transit News
65% Male
64% $50K -$99.9K
63% Kids in HH
62% College Grad+

BASE: ALL RESPONDENTS (n=606)
Q200. There are a lot of issues in the news, and it is hard to keep up with them every day. Please indicate how interested you are in issues relating to transportation in the Northern Virginia region (such as roads, traffic, commuting, public transportation, biking, trails, etc.).
Q205. How informed are you about issues relating to transportation in the Northern Virginia region (such as roads, traffic, commuting, public transportation, biking, trails, etc.)?

NVTA's TransAction

Quality of life with regard to transportation is still seen as mediocre among Northern VA residents.

Residents who **rate overall quality of life higher**:

- Aware of TransAction
- Ages 65+
- Arlington County
- Loudoun County
- Ages 35-44
- Live/Work same County/City
- Aware of NVTA
- Majority of life in region
- $50K-$99.9K
- Work in NoVA

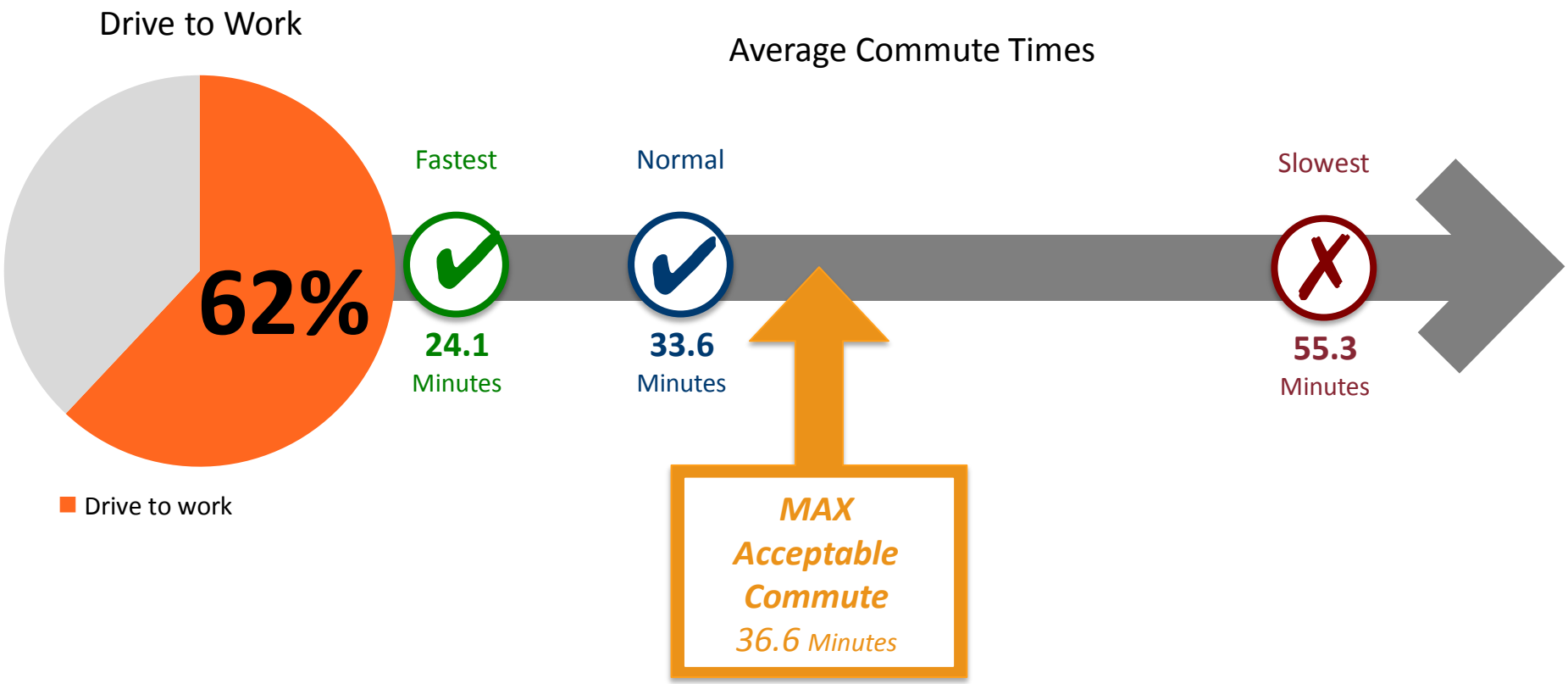
BASE: ALL RESPONDENTS (n=606)

Q300 Think for a moment about the **impact of transportation on your overall quality of life here in Northern Virginia.** Imagine a ladder with ten steps representing the "ladder of life." Let's suppose the top of the ladder, the tenth step, represents the best possible life for you from a transportation perspective; and the bottom, the first step, the worst possible life for you from a transportation perspective. On a scale of 1 to 10, on which step of the ladder do you personally stand at the **present time?**

NVTA's TransAction

Typically, residents' max acceptable commute only allows for approximately 3 minutes additional flexibility from their average commute time.

Impact of Traffic Congestion Levels on Commute Time



BASE: ALL RESPONDENTS (n=606)
Q580. Do you drive to work?
BASE: DRIVE TO WORK (n=374)
Q585. In a vibrant region like Northern Virginia, some level of traffic congestion is inevitable for people who drive to work. Thinking about your regular morning commute trip, please provide an estimated number of minutes for each of the following:

NVTA's TransAction

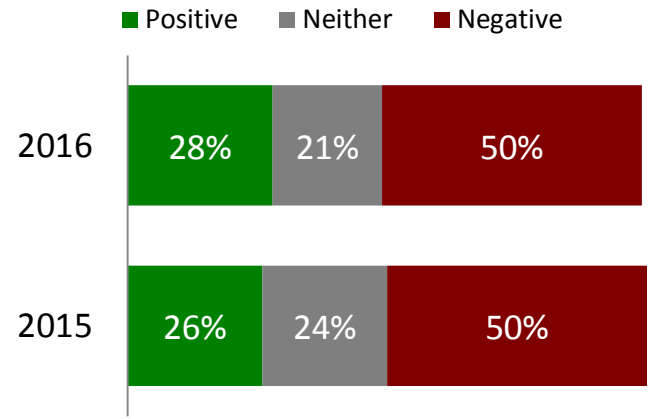
Similar to 2015, a quarter heard something positive largely related to either Metro/WMATA improvements or road projects.

Top-of-Mind for Transportation Issues

Positive

- **36% Metro/WMATA Mentions**
  - *I know they are connecting the Dulles airport with the metro, they are repairing some of the metro lines, and they are privatizing the metro parking lots.*
  - *Metro is working on issues with its system to make it safer.*
  - *Plans are underway to extend the Metro to Fredericksburg, VA.*
- **27% Road Mentions**
  - *Infrastructure budget for road improvement has been approved.*
  - *Continued enhancements of route 7 with fly overs for cross roads, making biking trail safer so not to cross over busy roads.*
  - *Much construction of roads around Fort Belvoir.*
- **15% I-66 Mentions**
  - *Interstate 66 will be widened inside the beltway and turned into a toll road.*
  - *The sale of the right to collect tolls on I-66 and the potential road improvements related to it. Biggest plus in the contract is that it was not given to the 495 hot lanes who gouged people for violations which weren't really their fault.*
- **5% Bus Mentions**

Is what you heard…



Most Likely to Hear Something *Positive*:

- 55% Aware of TransAction
- 40% Loudoun County
- 39% Kids in HH
- 38% Ages 65+
- 37% Ages 25-34
- 35% Aware of NVTA
- 33% Influencers

BASE: ALL RESPONDENTS (n=606); Positive (n=115)
Q400. What, if anything, have you heard, read or seen recently regarding transportation issues, actions or news in the Northern Virginia region?
BASE: HEARD, READ, SEEN TRANSPORTATION ISSUES (n=411)
Q405. Would you consider what you have heard, read, or seen positive or negative?

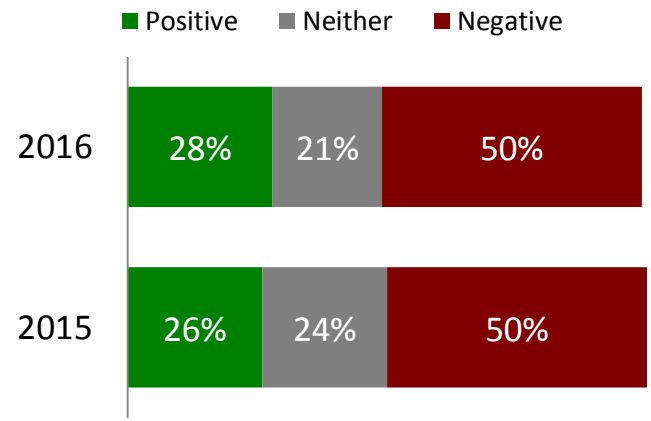
Half of residents heard something negative, focused primarily on Metro/WMATA issues.

Top-of-Mind for Transportation Issues

Negative

- **62% Metro/WMATA Mentions**
  - *Metro is going to be cutting hours for the next two years and a train de-coupled yesterday.*
  - *Problems with Metro and disputes over how to fund it.*
  - *There are a lot of Metro delays and as a result it affects your work schedule.*
  - *Metro is being sued and has been in financial trouble.*
- **22% I-66 Mentions**
  - *Push for toll road on I-66. This is a total disaster, especially if they let single drivers with deep pockets clutter up the road instead of encouraging carpools.*
  - *I-66 toll lanes will impact my commute.*
- **20% Road Mentions**
  - *Need to replace deteriorating bridges and roads. Need for additional capacity to roads to support area growth.*
  - *Terrible road conditions (potholes, etc.), bridges are old and need repairs.*
- **16% Traffic/Congestion Mentions**
  - *Increased traffic congestion around the opening of the MGM casino in Maryland.*
- **8% Toll Mentions**

Is what you heard…



Most Likely to Hear Something *Negative*:

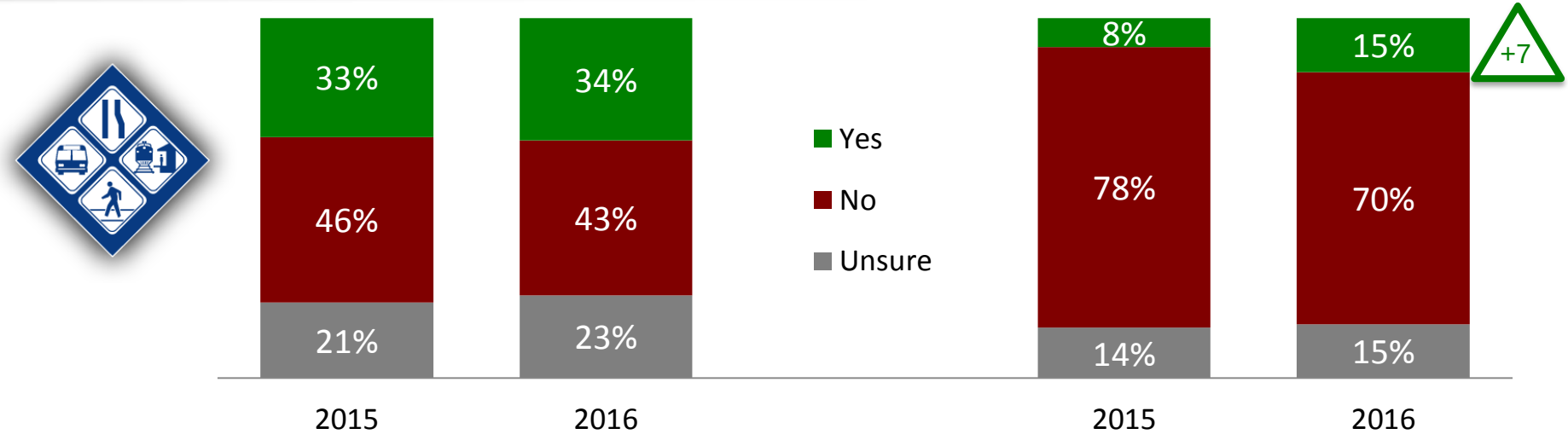
- 73% Work in DC
- 68% Work outside NoVA
- 65% Arlington County
- 62% Live/Work different County/City
- 62% Rent home
- 57% Fairfax County/Falls Church
- 56% No Kids in HH
- 55% Not Aware of TransAction

BASE: ALL RESPONDENTS (n=606); Negative (n=213)
Q400. What, if anything, have you heard, read or seen recently regarding transportation issues, actions or news in the Northern Virginia region?
BASE: HEARD, READ, SEEN TRANSPORTATION ISSUES (n=411)
Q405. Would you consider what you have heard, read, or seen positive or negative?

NVTA's TransAction

Awareness of TransAction has nearly doubled since 2015, and is more likely to be recognized by those also aware of NVTA.

Have you ever heard of…



…an organization called the **Northern Virginia Transportation Authority,** also known as NVTA?

…the **TransAction** long range transportation plan?

Most Likely to Have Heard of NVTA:

- 72% Aware of TransAction
- 56% Loudoun County
- 50% Ages 65+
- 44% Influencer
- 41% Heard NoVA Transit News
- 40% $100K+
- 40% White
- 40% Married/Live with Partner

Most Likely to Have Heard of TransAction:

- 31% Aware of NVTA
- 24% Loudoun County
- 24% Ages 25-34
- 23% Kids in HH
- 22% Influencer
- 20% Live/Work same County/City
- 20% $50K - $99.9K

BASE: ALL RESPONDENTS (n=606)
Q417. Have you ever heard of an organization called the Northern Virginia Transportation Authority also known as NVTA?
Q420. Have you ever heard of the TransAction long range transportation plan?

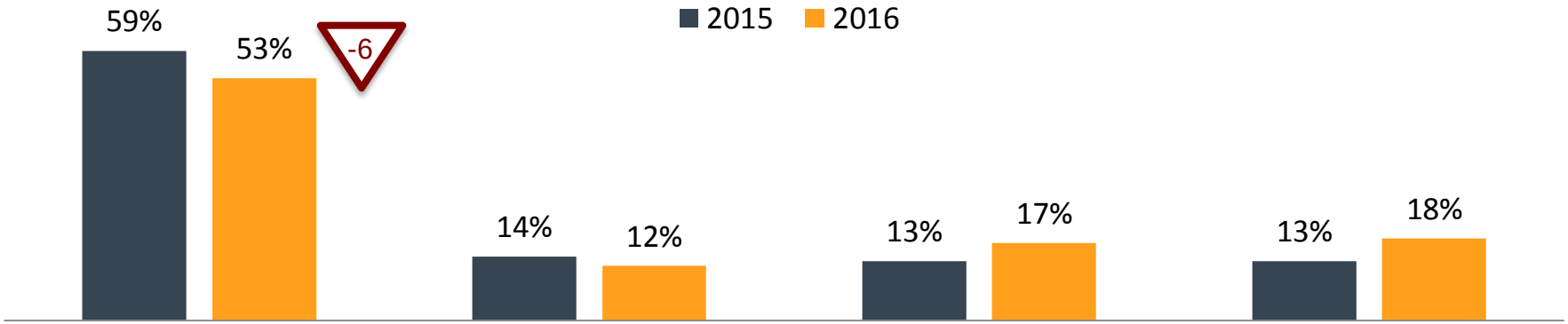
NVTA's TransAction

Transportation

PERSONAL VALUES

Traffic flow and congestion remains the greatest influence on the quality of residents' lives, but has significantly decreased in the past year, while the impact of both transportation options and infrastructure have increased moderately.

Biggest Impact on Your Quality of Life



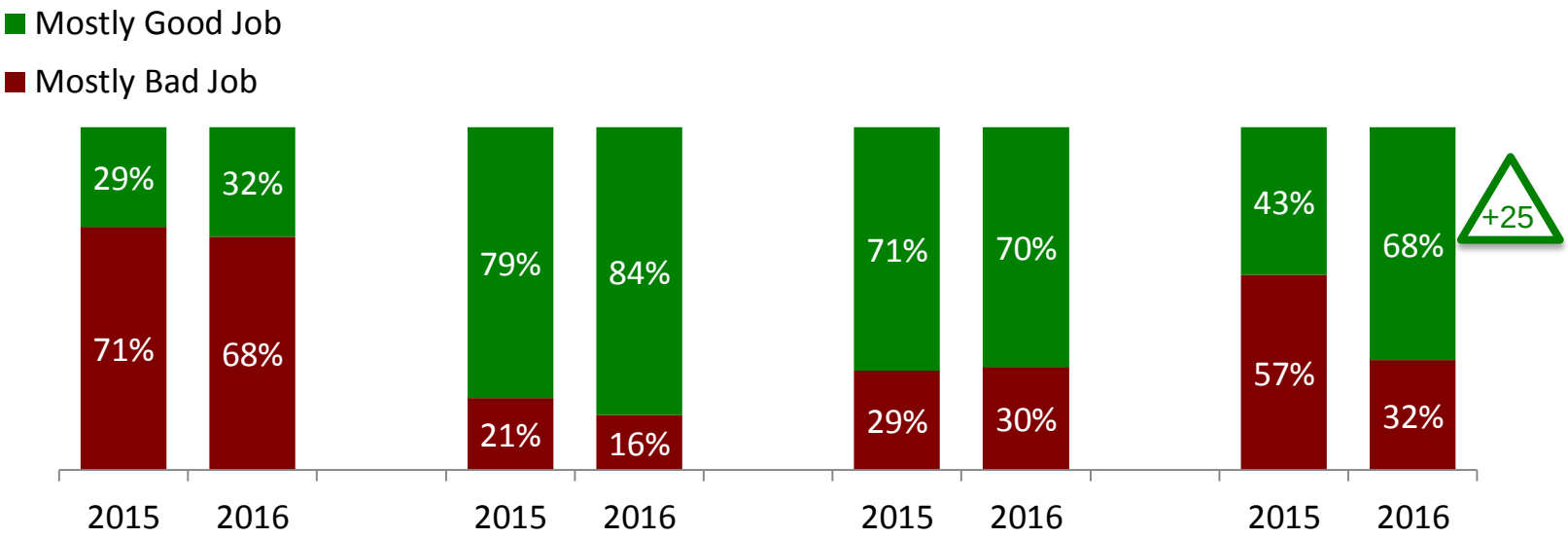
Traffic Flow and Congestion	Convenient Access	Transportation Options	Transportation Infrastructure
Traffic flow and congestion	Convenient access to work, shopping, restaurants, schools, services	The number and variety of transportation options available for me to get around	The maintenance and quality of the transportation infrastructure (including roads, bridges, rail and trails)

BASE: ALL RESPONDENTS (n=606)
Q520. Northern Virginia residents and workers have mentioned different factors relating to transportation—both positive and negative—that contribute to or detract from their quality of life. Thinking about transportation here in this region and your personal quality of life, please identify **which one of the following you feel has the biggest impact on you and your family personally?**

NVTA's TransAction

There is a strong positive 25-point shift in the perception that the region is doing a good job when it comes to Transportation Infrastructure.

Region is Doing A…



Traffic Flow and Congestion	Convenient Access	Transportation Options	Transportation Infrastructure

BASE: SELECTED IN Q520 (Q530 n =97; Q540 n=101; Q550 n=71; Q560 n=337)
Q530. Currently, when it comes to the number and variety of transportation options, do you feel that the region is doing a good job or a bad job?
Q540. Currently, when it comes to the maintenance and quality of the transportation infrastructure do you feel that the region is doing a good job or a bad job?
Q550. Currently, when it comes to convenient access to work, shopping, restaurants, schools and services, do you that like the region is doing a good job or a bad job?
Q560. Currently, when it comes to improving traffic flow and reducing congestion, do you feel that the region is doing a good job or a bad job?

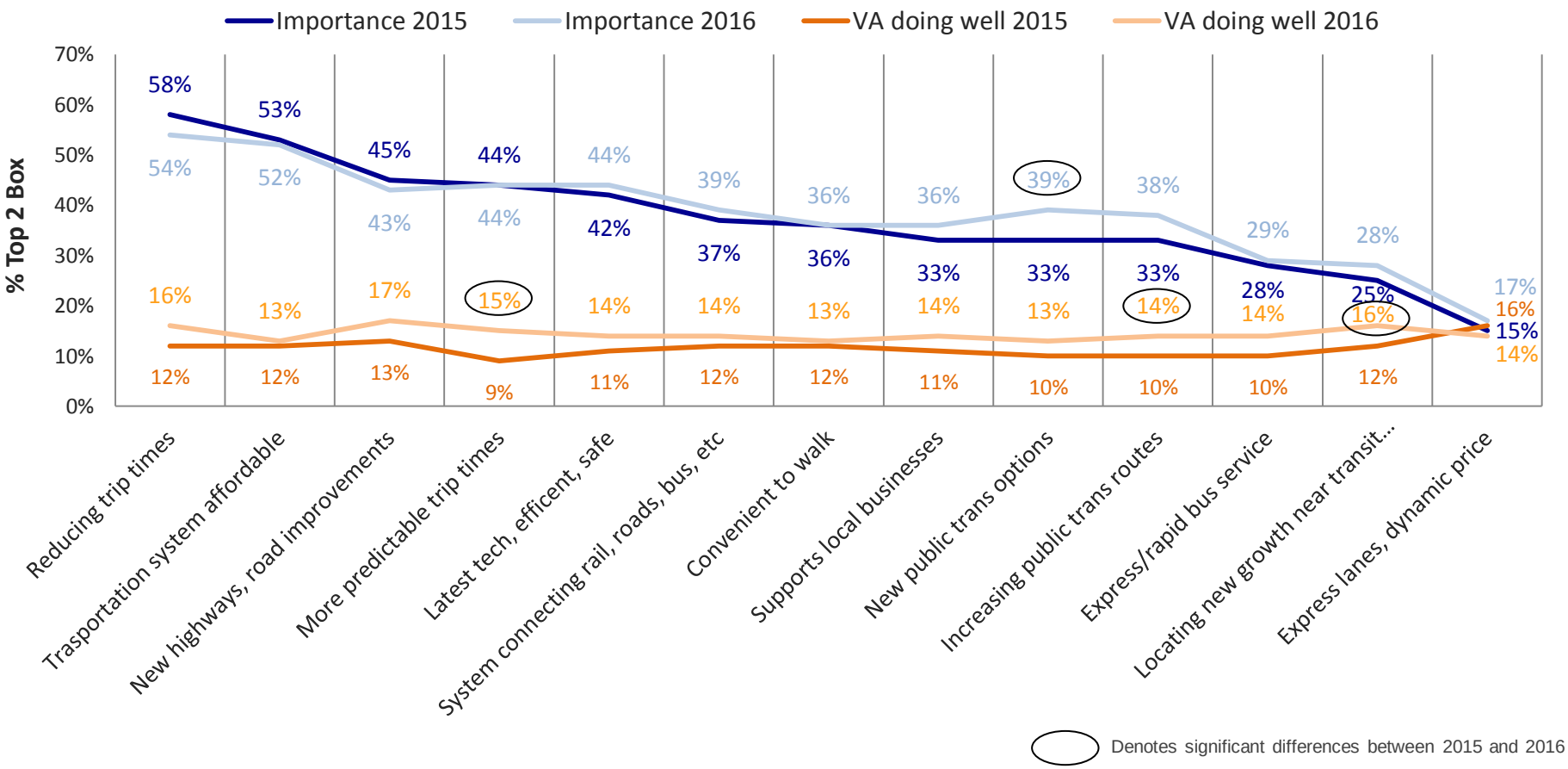
NVTA's TransAction

Transportation

REGIONAL VALUES

Regional performance on key metrics has had a marginal positive shift with a few areas of significant improvement, including predictable trip times, increased routes and locating new growth near transit.

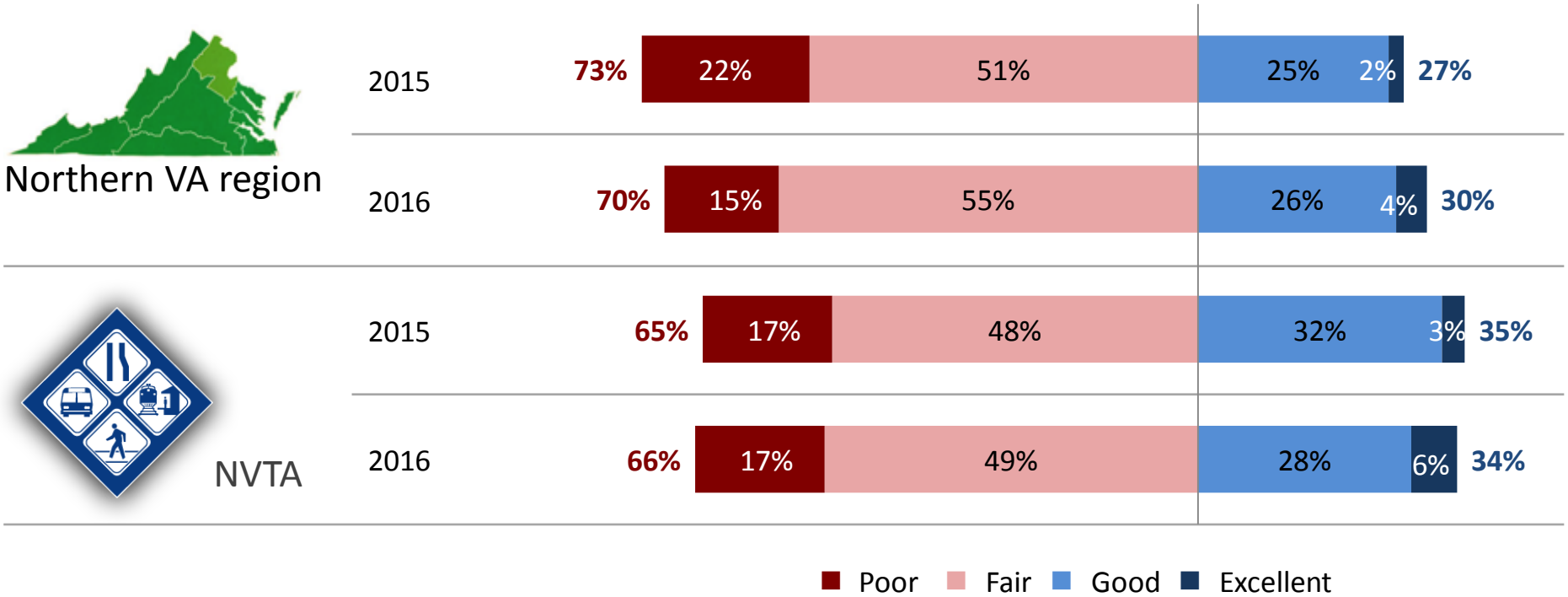
Importance vs. Performance on Regional Transportation Priorities



BASE: ALL RESPONDENTS (n=606)
Q600. Thinking specifically about transportation issues and priorities, please rate each of the following where 1 means 'Not at all important to the future of the region" and 10 means "Extremely important priority for the future of the region':
Q605 Please indicate how well you think Northern Virginia is performing on each of these priorities using the scale where 1 means the region is not performing well at all and 10 means the region is performing extremely well.

Ratings of both Northern VA and NVTA's performance with regard to planning and implementing transportation solutions are on par with 2015. About three in ten rate Northern VA good/excellent and about one third rate NVTA good/excellent.

Performance on Planning and Implementing Transportation Solutions

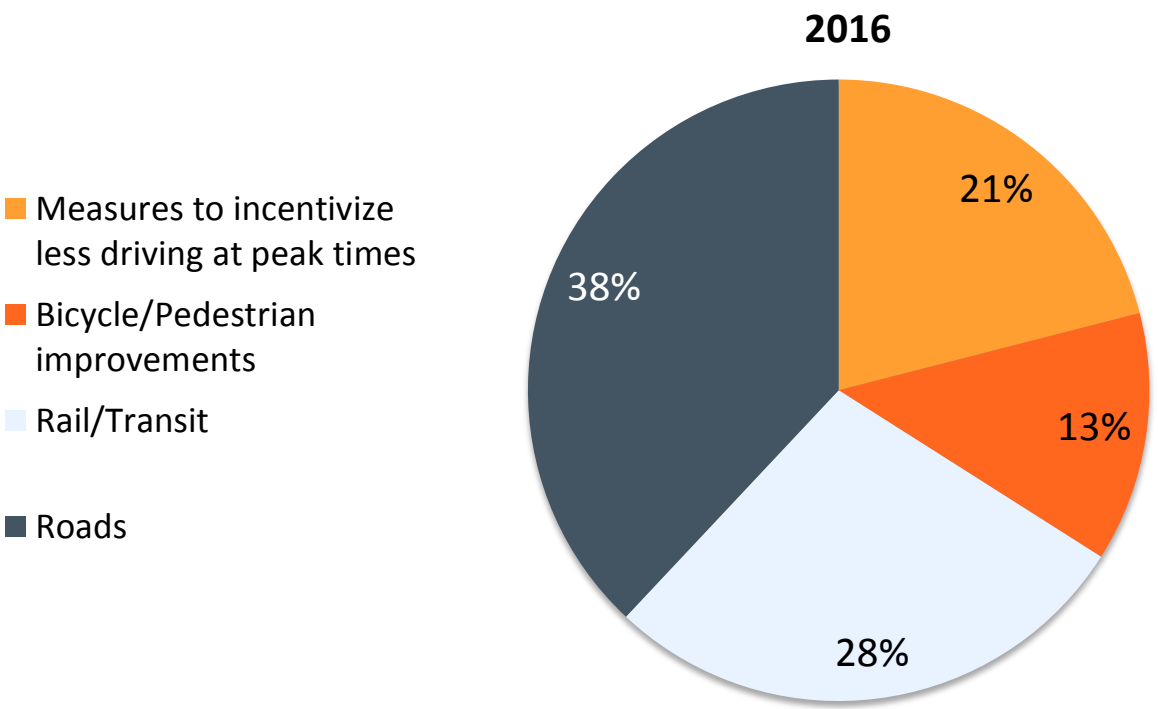


BASE: ALL RESPONDENTS (n=606)
Q630. How would you rate the performance of Northern Virginia region when it comes to planning and implementing transportation solutions in the region?
BASE: Have Heard of NVTA (n=212)
Q645. How would you rate the performance of Northern Virginia Transportation Authority (NVTA) when it comes to planning and implementing transportation solutions in the region?

MESSAGING

Residents allocate the majority of investment to roads, followed by rail/transit and measures to incentivize less driving at peak times.

Proportion of Investment in Transportation Improvements



Fairfax, Loudoun, Alexandria, and Prince William allocate greater portion towards roads while Arlington allocates greater portion towards rail/transit.

BASE: ALL RESPONDENTS (n=606)
Q735. If you had money to invest in transportation infrastructure improvements what proportion would you spend on roads, rail/transit and bicycle/pedestrian improvements? Please allocate 100 points to demonstrate how you would invest in each of the following…

NVTA's TransAction

The majority of residents view self-driving cars as "scary" or "dangerous" with apprehensions about their safety.

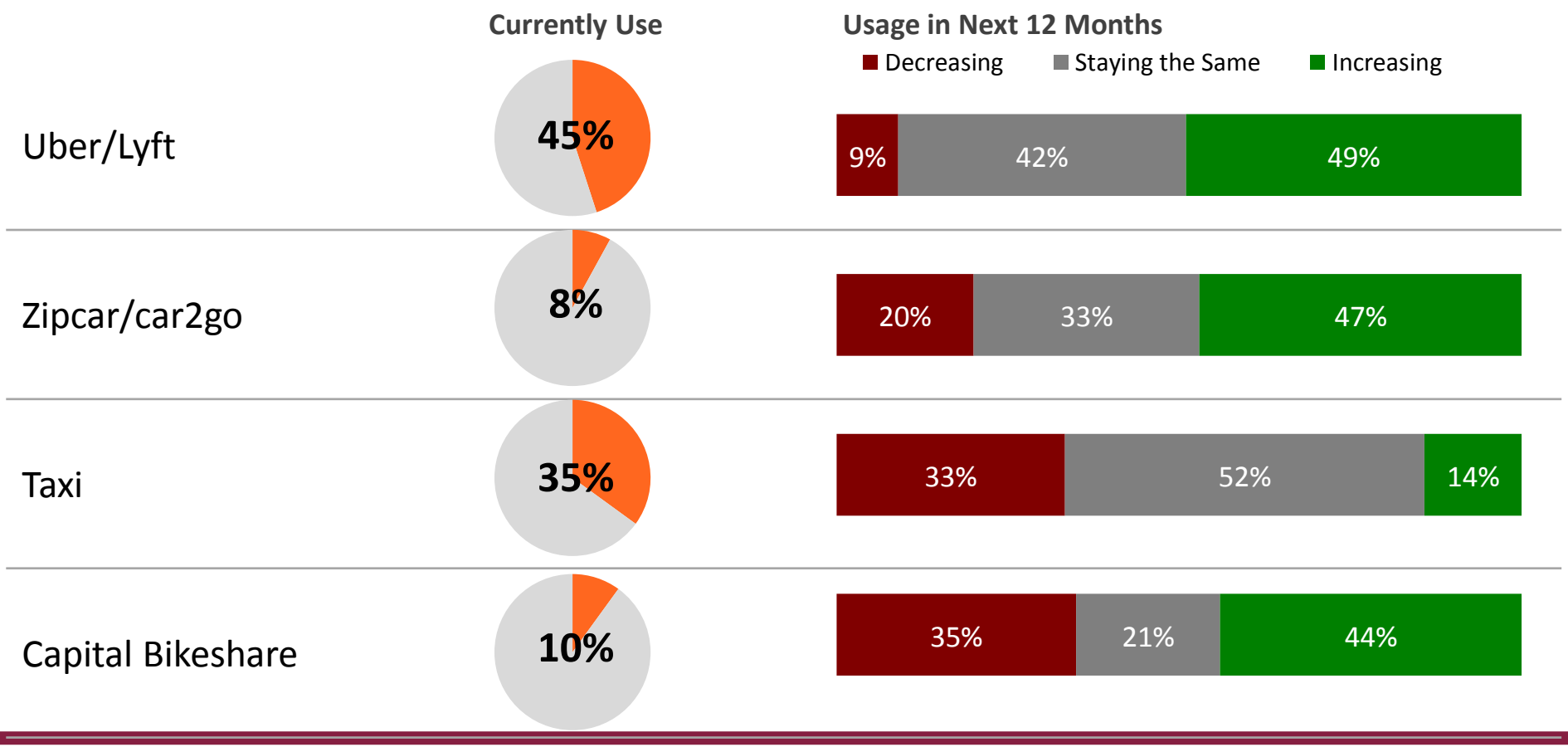
Opinions on Self-Driving Cars

BASE: ALL RESPONDENTS (n=606)
Q725. What one word or phrase would you use to describe your overall feelings of self-driving cars being on the road in Northern Virginia in the near future?

NVTA's TransAction

Uber and Lyft are the most used alternatives and are expected by residents to have the largest increase in usage over the next year.

Usage of Car Ownership Alternatives

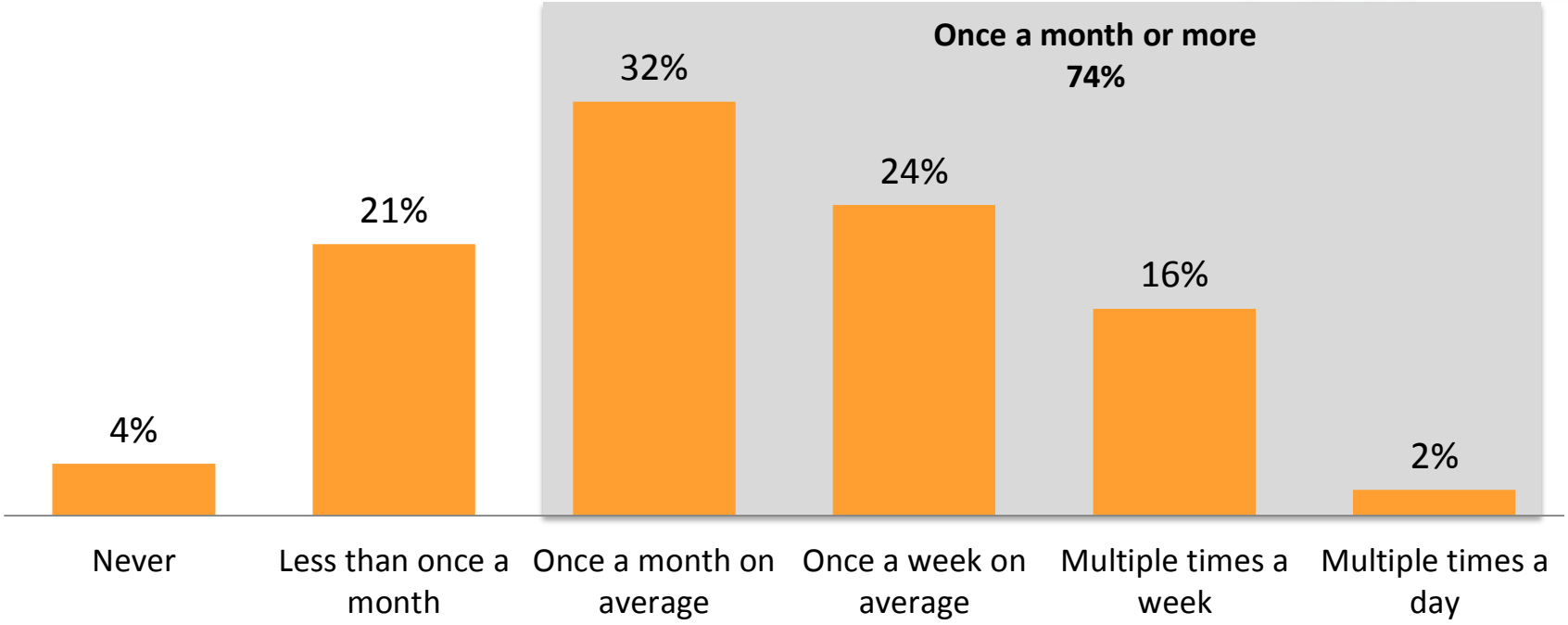


BASE: ALL RESPONDENTS (n=606)
Q740. There are a number of alternatives to owning a car that are being used by people living in the region. Which of the following do you currently use?
BASE: USE SERVICE (Uber/Lyft n=265; Zipcar/car2go n=46; Taxi n=208; Capital Bikeshare n=55)
Q745. Do you anticipate your usage increasing, decreasing or staying the same over the next 12 months for each of the following?

NVTA's TransAction

Three quarters of Northern VA residents use online shopping at least once a month on average.

Frequency of Online Shopping



BASE: ALL RESPONDENTS (n=606)
Q750. Many people are taking advantage of online shopping today. Over the past year, how many times have you placed an online order for goods to be delivered to your home?

NVTA's TransAction

DEMOGRAPHICS

Demographic Profile

Gender	2015	2016
Male	48%	48%
Female	52%	52%

Age		
18-24	7%	11%
25-34	22%	22%
35-44	24%	21%
45-54	20%	21%
55-64	15%	14%
65+	12%	11%

Race/Ethnicity		
White	58%	58%
Black	11%	11%
Hispanic	15%	15%
Asian	14%	14%
American Indian/Alaskan native	*	*
Native Hawaiian/Pacific Islander	*	*
Multi-race	2%	2%
Other	*	*

Employment	2015	2016
Employed (NET)	73%	72%
Full-time	64%	58%
Part-time	5%	9%
Self-employed	4%	5%
Student	3%	7%
Not Employed (NET)	24%	20%
Not employed/looking	2%	1%
Not employed/not looking	*	1%
Not employed/unable	*	1%
Retired	13%	13%
Stay home spouse/partner	8%	5%
Decline to answer	*	1%

Education		
HS or less	5%	7%
Some college	15%	14%
Associates Degree	6%	6%
Bachelor's Degree	35%	37%
Master's Degree	28%	27%
Professional Degree	7%	5%
Doctorate Degree	4%	4%
Decline to answer	*	*

Income	2015	2016
<$50K	13%	16%
$50K but less than $75K	15%	16%
$75K but less than $100K	17%	18%
$100K but less than $150K	25%	21%
$150K but less than $200K	11%	11%
$200K or more	11%	10%
Decline to answer	9%	8%

Marital Status		
Married	60%	56%
Single, never married	24%	32%
Divorced/Separated/Widowed	11%	8%
Living with Partner	5%	3%
Decline to answer	*	*

Household		
Avg. Number of Adults	2.1	2.1
Avg. Number of Children <18	0.6	0.6