NVTA's TransAction

Transportation Action Plan for Northern Virginia

NVTA TransAction 2019 Update:

Tracking Changes in Transportation Attitudes and Priorities

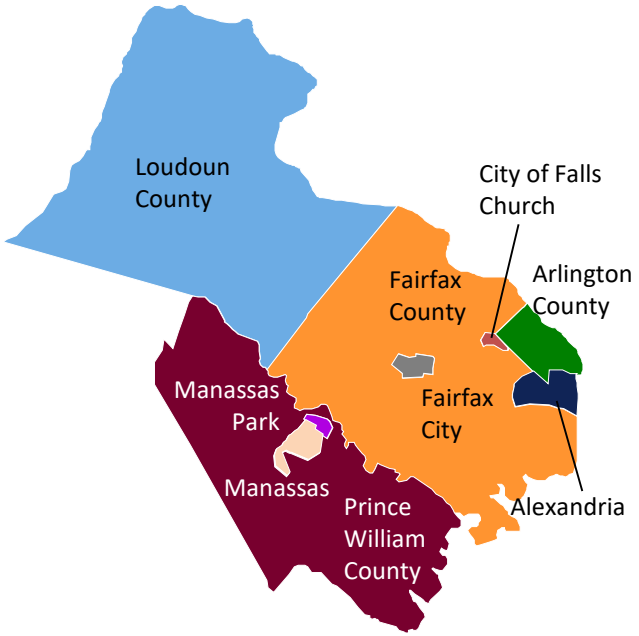
January 2020

HEART+MIND STRATEGIES

NVTA's TransAction

Methodology

AUDIENCE	Residents 18 years or older within jurisdiction of Northern Virginia Transportation Authority n=616
DATES	December 10-27, 2019
MODE	Online Survey
LENGTH	14 minutes
GEOGRAPHY	**Northern Virginia** Arlington County, Fairfax County, Loudoun County, Prince William County and the Cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park
DATA WEIGHTING	2019 data weighted by ethnicity 2016 data weighted by gender and ethnicity 2015 data weighted by ethnicity



NVTA's TransAction

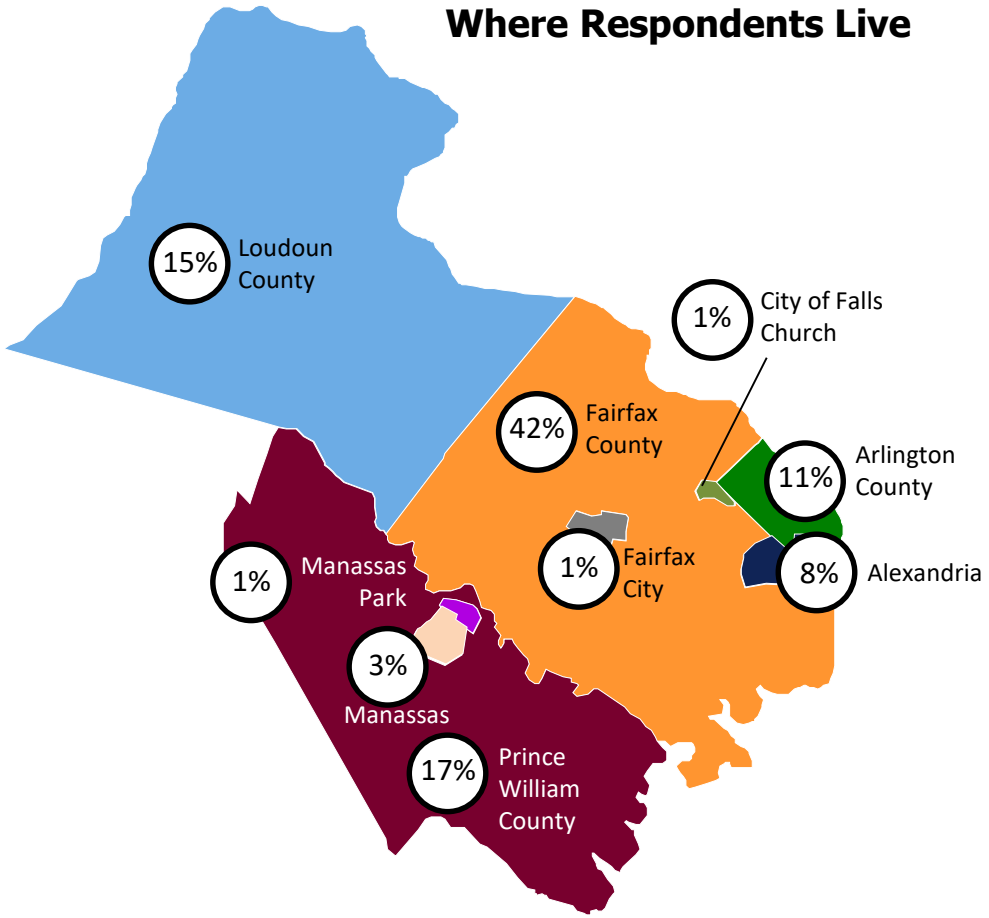
Methodology: Reporting Notes

- Survey Respondent Selection
  - Scientific study using an opt-in online panel.
  - Respondents must be age 18+ and residents of Northern Virginia, more specifically, residents of Arlington County, Fairfax County, Loudoun County, Prince William County, Alexandria, Fairfax City, City of Falls Church, Manassas, and Manassas Park.
  - We aim for an overall representation of regional demographics based on age, gender, and race according to the US Census. We also aim for a proportionate sample that represents each county/city by population size according to the US Census. For the most part we use sample quotas to hit these demographic targets.
- Confidence Interval and Margin of Error
  - All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate. Online opt-in panels such as the one used for this study do not use probability sampling and accordingly the strict calculation of sampling error is not typically done. In the hypothetical case of a perfectly random sample and no response or measurement errors, a sample of this size (n=616) would produce a margin of error of ± 3.95% at a 95% confidence interval. Margins of error for subgroups would be higher.
- Ethnicity clarification
  - Black, White, Asian refer to Non-Hispanic Black/White/Asians.
- Statistical Testing Notations

  △ Indicates statistically significant differences between 2016 and 2019 ($p<.05$). When appropriate, the report indicates these differences using green, red, and blue color coding wherein green = an increase or positive change; red = decrease or negative change; blue = may be construed as either positive or negative/or just a change that might be of interest.
- ( ) Numbers in parenthesis are of interest but are not statistically significant at $p<.05$ level. When shown these numbers are color coded in the same way as described in prior bullet.

NVTA's TransAction

Resident Profile



County/City of Employment	2015	2016	2019
Fairfax County	37%	36%	35%
District of Columbia	18%	12%	11%
Arlington County	11%	11%	12%
Loudoun County	8%	13%	12%
Alexandria	7%	9%	9%
Prince William County	6%	8%	12%
Manassas	4%	2%	2%
Fairfax City	2%	2%	2%
City of Falls Church	1%	1%	1%
Manassas Park	*	*	1%
Other county in Virginia	1%	1%	2%
Other county in Maryland	3%	2%	1%
Other	1%	3%	2%

Years of Residency			
Less than 1 year	3%	2%	3%
1 to 5 years	19%	16%	17%
6 to 10 years	14%	12%	14%
11 to 15 years	12%	14%	11%
More than 15 years	51%	56%	55%

Own/Rent Home			
Own	65%	70%	64%
Rent	32%	26%	31%
Neither	2%	3%	3%
Decline	1%	1%	2%

NVTA's TransAction



EXECUTIVE SUMMARY

Executive Summary: Key Highlights

- Overall, since the launch of the benchmark wave*, residents see improving performance from both the region and NVTA.
  - 39% of residents say that the Northern Virginia region's performance is either excellent or good on transportation related issues.
    - A gain of +12 points over time (30% 2016; 27% 2015).
  - 47% of residents say that NVTA's performance is either excellent or good.
    - A gain of +12 points as well from the benchmark wave (34% 2016; 35% 2015).

*Benchmark wave refers to the first wave of the tracker conducted in 2015.

Executive Summary: Overall Landscape

- Northern Virginia residents' interest in transportation issues is still high (Top 3 Box Interest: 74%; Top 3 Box Informed: 61%).
- Impact of transportation on Quality of Life also stays slightly positive overall with an average score of 6 (6/10).
- Concern about traffic congestion on Quality of Life decreases by 7 points to 26% (vs. 33% in 2016) and the focus turns to areas like housing.
  - Traffic congestion is also less influential when choosing where to live (17%) versus where to work (42%).
- Residents also report their normal commute time is 3 minutes faster.
  - However, the average maximum acceptable commuting time stays unchanged.
  - And, there is a slight decline in the number of residents who drive to work.
- A majority now say that the region is doing a mostly "good job" on key transportation priorities impacting Quality of Life (56% 2019; 51% 2016; 43% 2015: A +13-point increase from the benchmark wave).
- The gap between recall of positive and negative news shrinks this wave.
  - Residents are more likely to recall positive news and are much less likely to recall negative news compared to prior waves
  - Social media continues to grow as an information source for regional transportation news at the expense of traditional media (print, radio and TV)
  - Overall, residents' recall of transportation related news stories declines versus prior waves (56% 2019; 68% 2016; 65% 2015).

Executive Summary: Awareness and Performance of Regional Transportation Initiatives and Authorities

Awareness of:

- NVTA remains stable over time (35% 2019; 34% 2016; 33% 2015).
- TransAction also remains relatively stable as it holds on to the gains it made in 2016 (17% 2019; 15% 2016; 8% 2015).
  - TransAction was adopted in 2017 and has been largely dormant/missing from news since, so it is encouraging to see it hold /increase gains.
- A majority (58%) are unaware of any regional bus system initiatives.
  - Among those aware, many only recall one initiative.
- NOVA Rides, a NVTC Initiative, is at 30%.*
  - Note: NOVA Rides was heavily promoted through advertising and NVTA/TransAction spends very little on advertising. Thus, the NOVA Rides Initiative experience appears to demonstrate the power of targeted advertising in a relatively short period of time.

Performance on planning and implementing transportation solutions:

- Both the region and NVTA see significant improvements in their performance ratings (see also slide 6).
- Additionally, performance ratings for all regional priorities also improve in 2019 (see next slide).

*New item not asked in prior waves

NVTA's TransAction

Executive Summary: Importance & Performance of Regional Priorities

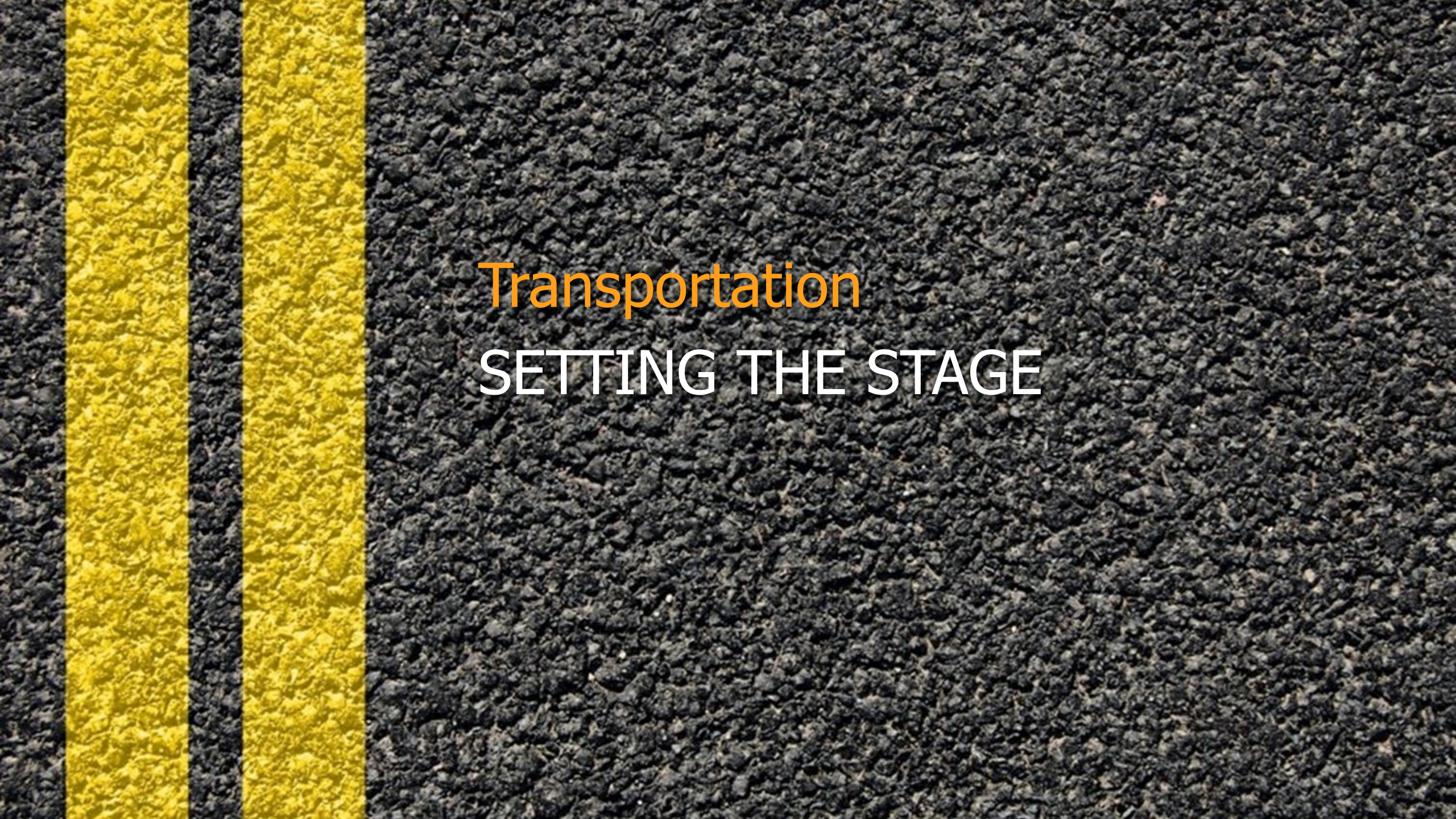
- Performance is improving across all regional transportation priorities, while importance stays either on par or decreases slightly compared to prior waves. Declining Importance plus Improving Performance means the issue(s) are being handled effectively.
  - While there is still much work to be done, residents note significant performance improvements on affordable transportation, using technology to improve efficiencies and safety, investing in new highways and road improvements, and providing new public transportation options.
  - The declining importance of reducing trip times and more predictable trip times may be due to some combination of: The rise in remote work, increased use of ridesharing options, the rise in online shopping, and completion of public transit and roadwork related projects.
  - Not only do residents consider reducing trip times and more predictable trip times of less importance, they also find them less impactful as communication strategies.
- Among potential projects, new/extended metro rail lines top the list.
- When asked about future funding strategies, incentives top the list.
  - Changing motor vehicle taxes and variable pricing for HOT lanes are a distant second.

Executive Summary: Messaging

- In terms of communication, focusing on *reducing travel time(s)* is still the best way to motivate interest and support among residents.
  - However, this message is less impactful today than it was in the benchmark wave (61% in 2019; 69% in 2016; 78% in 2015. A decrease of 17 points).
- When prioritizing investment, residents distribute most funds to roads and rail/transit.
- Residents describe self-driving cars as “scary” or “dangerous,” with a smaller group also categorizing them as “good.”
- While the use of ridesharing services increases to 60% from 45% in 2016, future use appears to be flattening.
- Use of vehicle sharing services (Zipcar/car2go) and Capital Bikeshare also increase from the last wave.
- Almost half (46%) of Northern Virginia residents shop online at least once a week, and a fifth (19%) shop online at least multiple times a week.



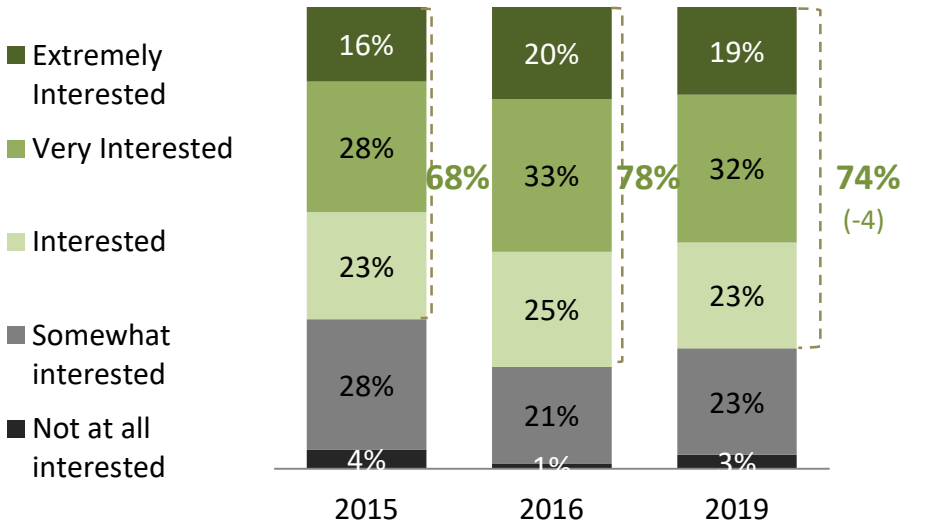
KEY FINDINGS


Transportation
SETTING THE STAGE

Interest in transportation issues remains high.

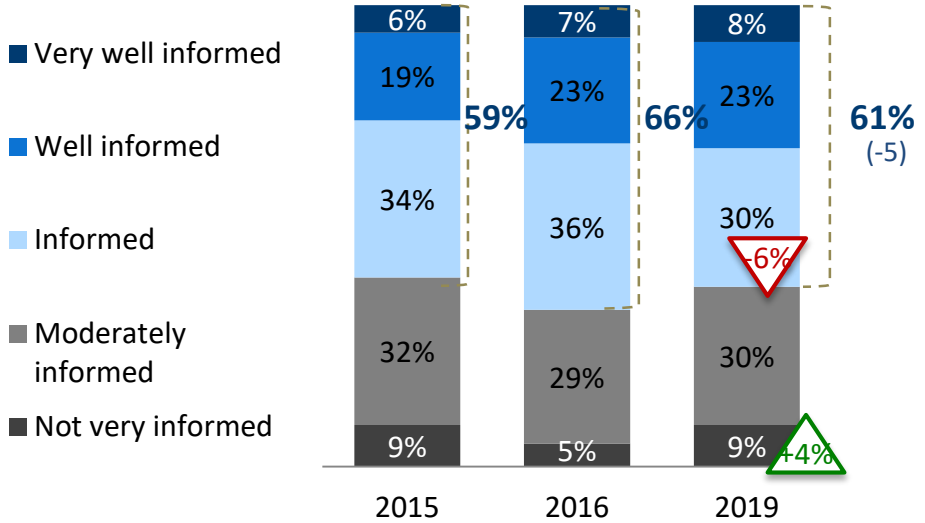
Interest

Issues related to Transportation in Northern Virginia



Informed

Issues related to Transportation in Northern Virginia



INFLUENCERS (Interested AND Informed) = 54%

Most Likely to Be Influencers:

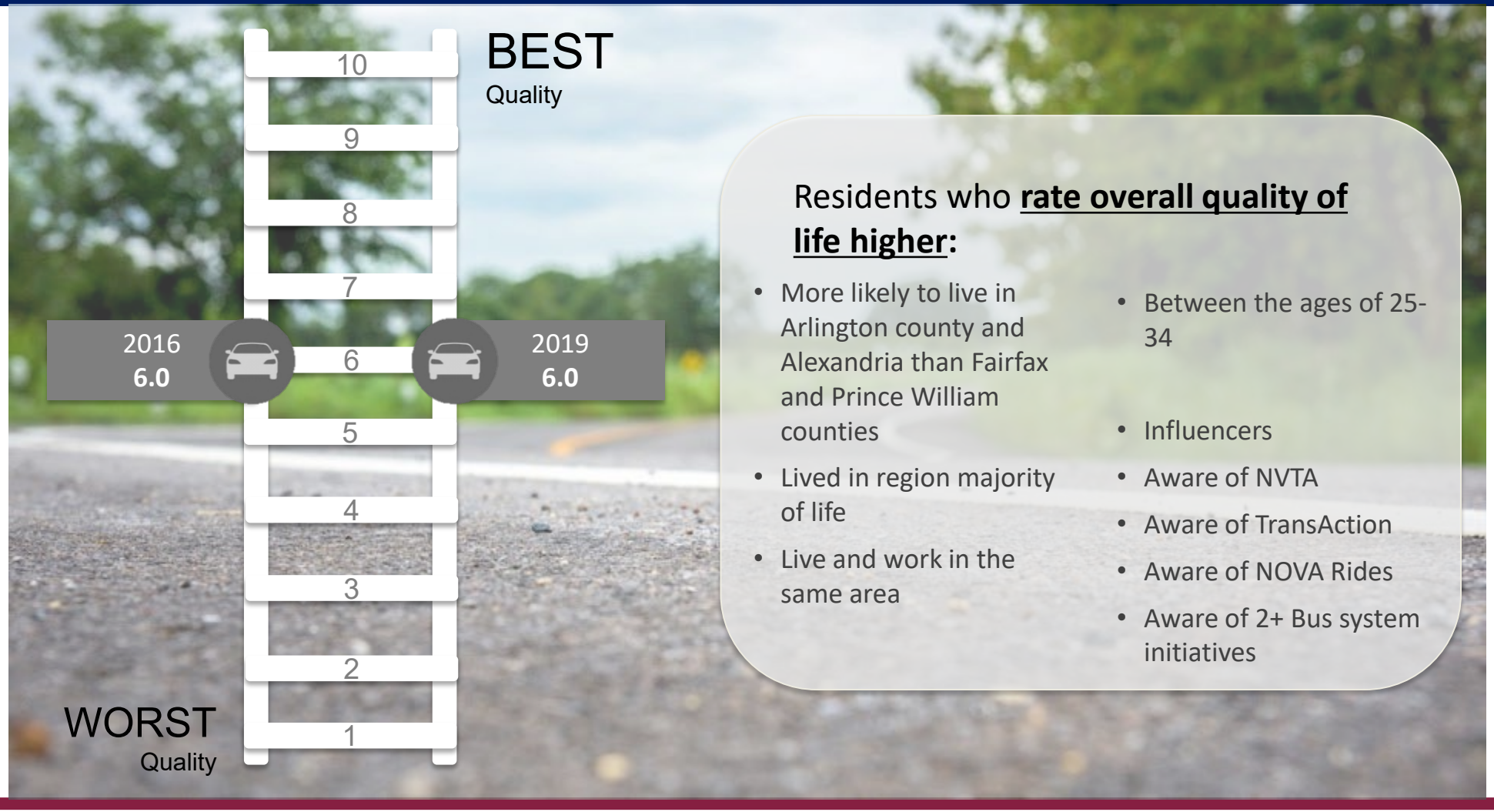
- 62% Male
- 63% HHI $100k+
- 57% Work in NoVa
- 57% College graduate +
- 58% Married/Living w partner
- 58% White
- 58% have lived in the region for more than 10 years
- 59% Home-owners
- 71% Aware of NVTA
- 77% Aware of TransAction
- 68% Heard NoVa transit news recently
- 73% Aware of NOVA Rides
- 90% Aware of 3+ bus system initiatives (71% 2+)

BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616)
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.)?

Denotes statistically significant differences between 2016 and 2019 (p<.05)

( ) #s in parenthesis are of interest, but are not statistically significant at p<.05 level

Impact of transportation on Quality of Life remains slightly positive overall.



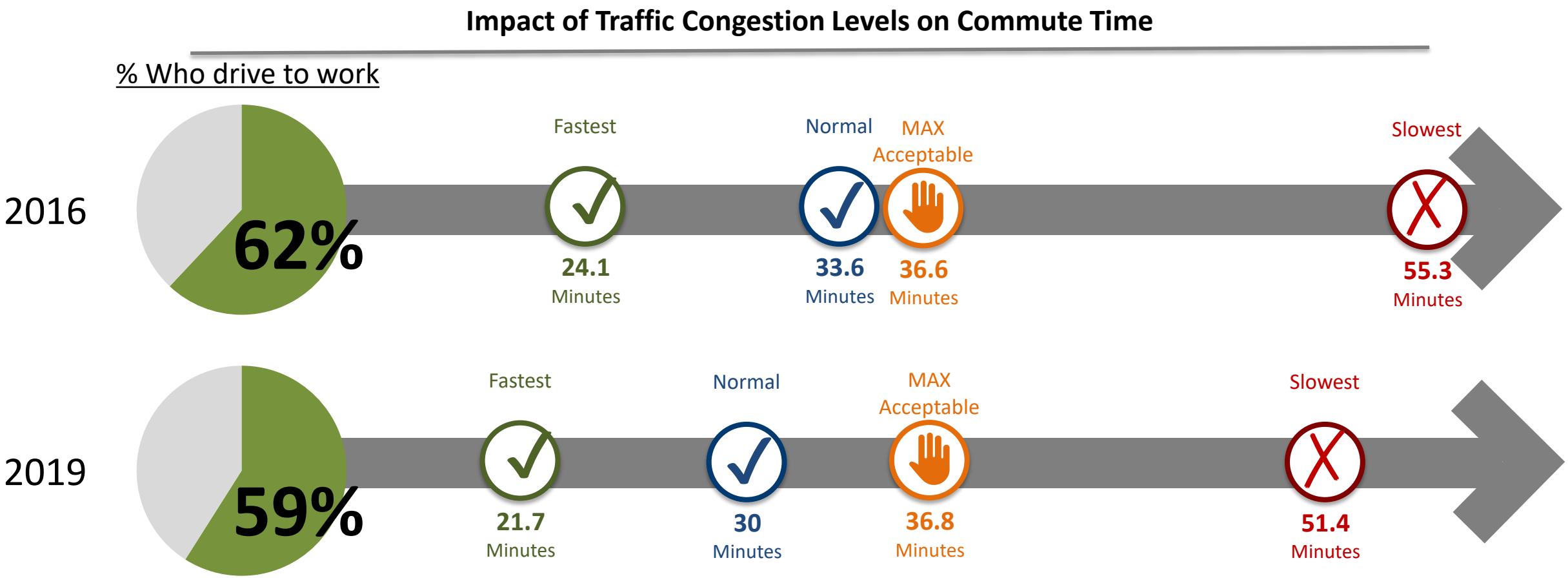
Residents who **rate overall quality of life higher**:

- More likely to live in Arlington county and Alexandria than Fairfax and Prince William counties
- Lived in region majority of life
- Live and work in the same area
- Between the ages of 25-34
- Influencers
- Aware of NVTA
- Aware of TransAction
- Aware of NOVA Rides
- Aware of 2+ Bus system initiatives

BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616)
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

Residents report their normal commute time is 3 minutes faster.



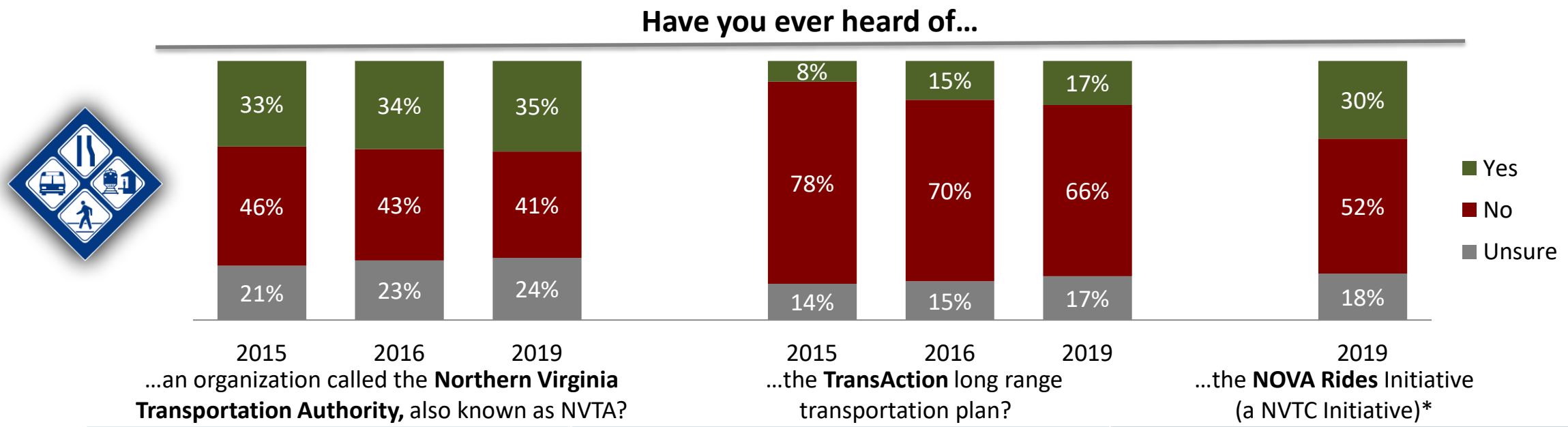
BASE: ALL RESPONDENTS (2016 n=606, 2019 n=616)
Q580. Do you drive to work?
BASE: DRIVE TO WORK (2016 n=375, 2019 n=362)
Q585. In a vibrant region like Northern Virginia, some level of traffic congestion is inevitable for people who drive to work. Thinking about your regular morning commute trip, please provide an estimated number of minutes for each of the following:

NVTA's TransAction

Transportation

AWARENESS LEVELS AND PERFORMANCE RATINGS FOR THE REGION AND REGIONAL AGENCIES

NVTA recall builds on gains from last wave. NOVA Rides recall is almost on par with NVTA recall.



% Most Likely to Have Heard of NVTA (2019)		% Most Likely to Have Heard of TransAction (2019)		% Most Likely to Have Heard of NOVA Rides (2019)	
• 45% Loudoun County • 39% Drive to work • 41% Male • 39% HHI $50k+ • 38% College grad+ • 42% Ages 55+ • 39% White • 39% Married/Living w Partner	• 40% Children at home • 43% Home-owners • 47% Influencers • 45% Heard NoVa transit news recently • 73% Aware of TransAction • 61% Aware of NOVA Rides • 69% Aware of 2+ Bus system initiatives	• 22% Majority of life in region • 26% Loudoun County • 24% Live and work in same county/city • 21% Work in NoVa • 22% Drive to work • 22% Male • 25% Ages 18-24 • 23% Children at home	• 24% Influencers • 22% Heard NoVa transit news recently • 35% Aware of NVTA • 38% Aware of NOVA Rides • 52% Aware of 2+ Bus system initiatives	• 38% Prince William County • 34% Work in NoVa • 35% Live and work in same county/city • 36% Drive to Work • 39% Ages 18-24 • 40% Hispanic • 35% Children at home	• 40% Influencers • 37% Have heard NoVa transit news recently • 51% Aware of NVTA • 68% Aware of TransAction • 71% Aware of 2+ Bus system initiatives

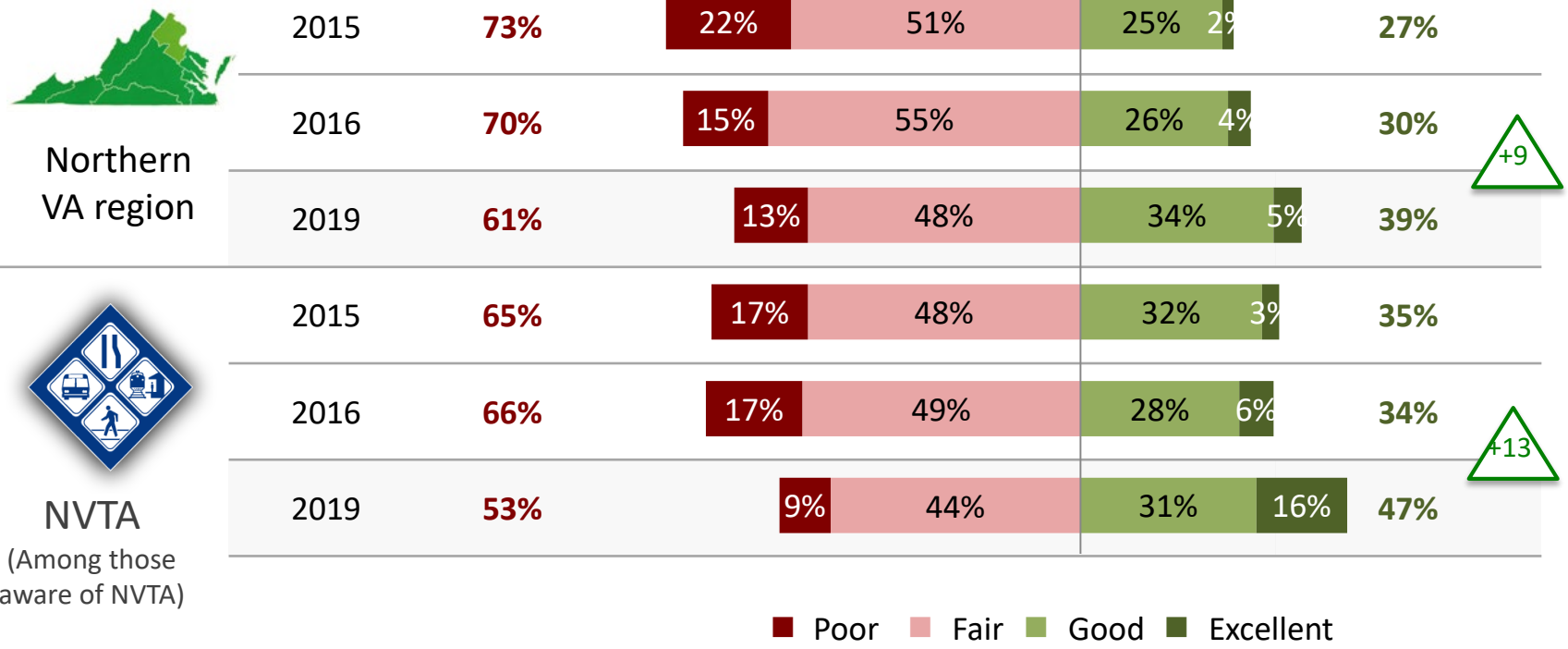
BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616)
Q417. Have you ever heard of an organization called the Northern Virginia Transportation Authority also known as NVTA? Q420. Have you ever heard of the TransAction long range transportation plan? Q423: Have you ever heard of the NOVA Rides Initiative?

* Note: NOVA Rides, a NVTC initiative, was heavily promoted through advertising and NVTA/TransAction spends very little on advertising. Thus, the NOVA Rides Initiative experience appears to demonstrate the power of targeted advertising in a relatively short period of time.

NVTA's TransAction

Both NoVa Region and NVTA performance ratings increase significantly.

Performance on Planning and Implementing Transportation Solutions



NOVA Region Performance, those rating it higher (as good/excellent) (2019):

- 50% Loudoun County; 50% Manassas/Manassas Park residents *
- 48% New residents (<1 year in region)*
- 44% Male
- 45% Ages 18 to 45
- 48% HHI < $50k
- 56% High school education or less
- 53% Black; 47% Hispanic
- 47% Children at home
- 49% Most imp on QoL: Transportation infrastructure
- 59% Most imp on QoL: Convenient access
- 45% Haven't heard NoVa transit news recently
- High awareness levels of local transportation bodies/initiatives. Among those aware of each: 49% NVTA, 64% TransAction, 49% NOVA Rides, 62% 2+ Bus system initiatives)

NVTA Performance, those rating it higher (as good/excellent) (2019):

- 56% Loudoun County*; 55% Prince William County*; 71% Manassas/Manassas Park*
- 56% Lived in region <5 years*
- 53% have lived in region majority of life
- 57% Ages 18 to 45
- 62% HHI <$50k
- 54% High school education or less
- 64% Black*; 53% Asian*
- 59% Children at home
- High awareness levels of local transportation bodies. Among those aware of each: 65% TransAction, 57% NOVA Rides, 73% 2+ Bus system initiatives*

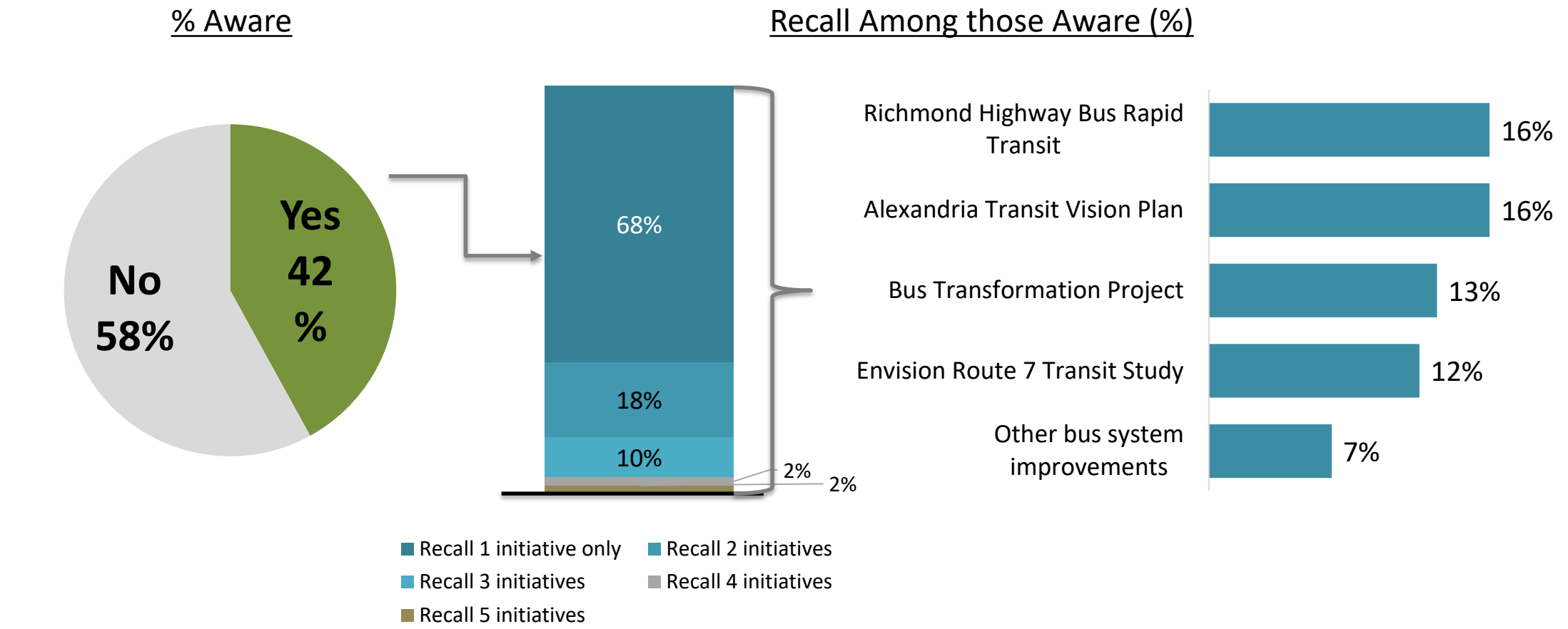
BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616)
Q630. How would you rate the performance of Northern Virginia region when it comes to planning and implementing transportation solutions in the region?
BASE: HAVE HEARD OF NVTA (2015 n=207, 2016 n=212, 2019 n=222)
Q645. How would you rate the performance of Northern Virginia Transportation Authority (NVTA) when it comes to planning and implementing transportation solutions in the region?

* Small base sizes less than 30/50. Data are directional only.

Denotes statistically significant differences between 2016 and 2019 (p<.05)

A majority are unaware of any bus system initiatives. Among those aware, many only recall one initiative.

Awareness of Bus System Initiatives



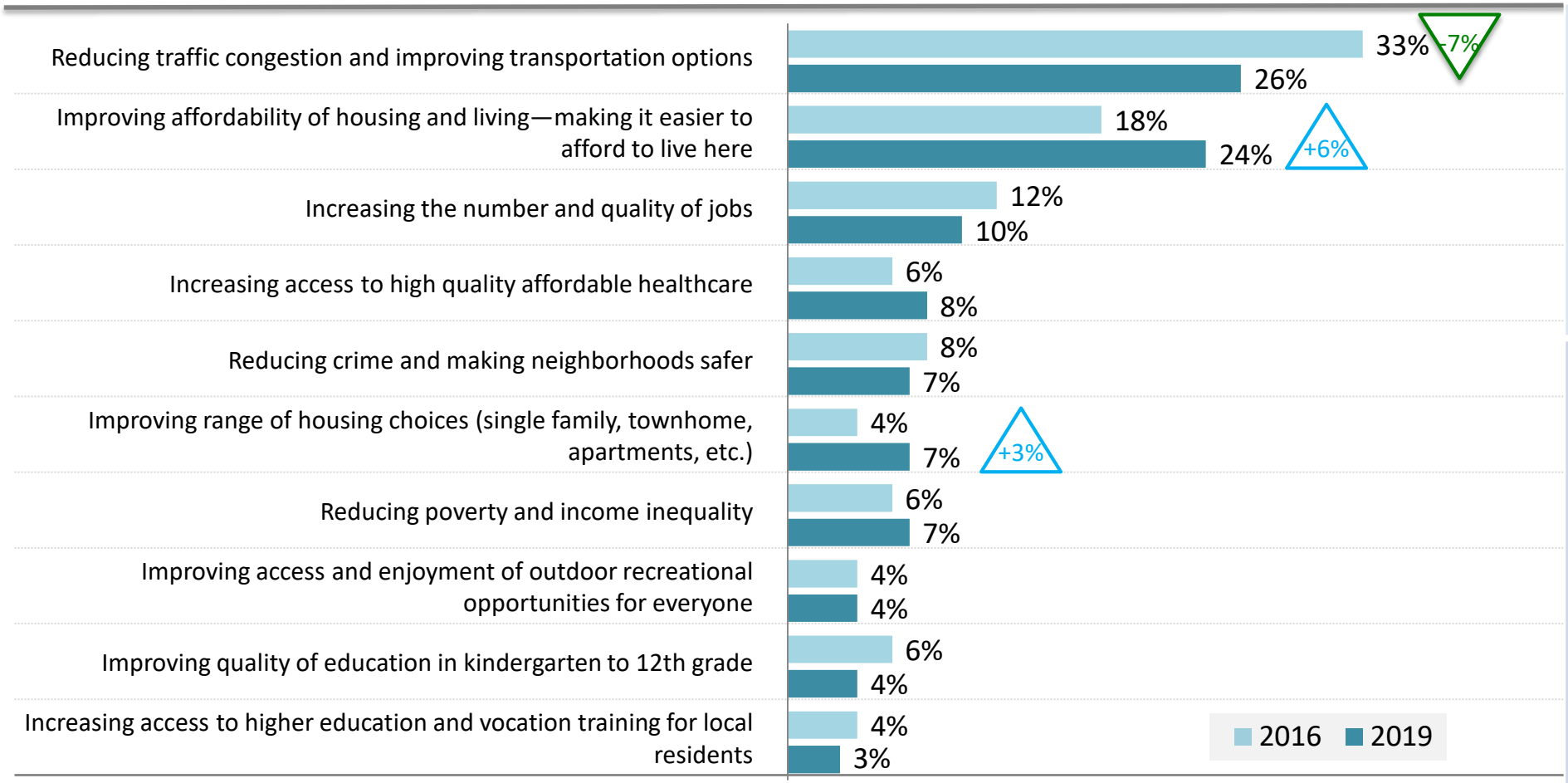
BASE: ALL RESPONDENTS (2019 n=616, 2019)
Q422. Are you aware of any of the following initiatives to improve the bus system either in your home jurisdiction or in Northern Virginia?

NVTA's TransAction


Transportation
PERSONAL VALUES

As concerns about traffic congestion decrease, focus turns to areas like housing.

Significant Impact on Quality of Life



When looking across groups, reducing traffic congestion is more important to (2019):

- Ages 55+
- Men
- Fairfax County residents
- White residents
- Those who have lived in region for 15+ years
- On average, have slightly higher commuting times
- Want higher spend on roads
- HHI $100k+
- Home-owners
- Influencers

Improving housing affordability is more imp. to (2019):

- Those who have lived in the region for < 10 years

- Ages 18-35
- Women
- Hispanic and Black residents
- Single
- Residents who are more likely to be high school graduates and/or have some college education
- Employed part-time
- HHI < $50k

- Want higher spend on incentivizing less driving at peak times
- Much more likely to be using ridesharing services and scooters

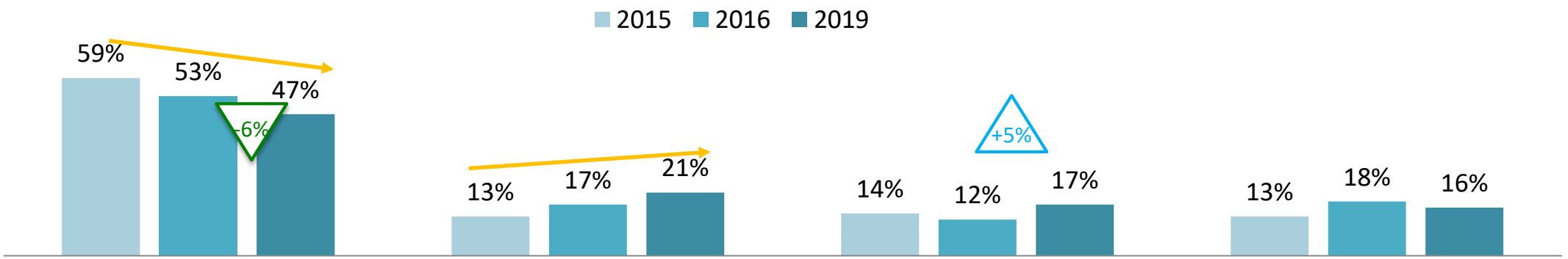
BASE: ALL RESPONDENTS (2016 n=606, 2019 n=616)
Q156. People in different regions of the country mention many factors that contribute to their quality of life. Thinking about the quality of life specifically in the Northern Virginia region, please identify which one of the following factors has the most significant impact on the overall quality of life for you personally.

Denotes statistically significant differences between 2016 and 2019 (p<.05)

NVTA's TransAction

Decline of traffic congestion on Quality of Life continues: Indicating the issue is being handled well.

Biggest Impact on One's Quality of Life



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

BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616)
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?

Denotes statistically significant differences between 2016 and 2019 (p<.05)

NVTA's TransAction

Traffic flow and congestion matter most to those who work outside of NoVa and those who are more affluent.

Biggest Impact on Your Quality of Life – Subgroup Analysis



Traffic Flow and Congestion (47%)
• 63% Work outside of NOVA (64% Work in DC) • 53% Live and work in a different county/city • 51% Lived in region for 15+ years • 56% HHI $100k+ • 52% College grad+ • 58% Ages 55+ • 54% White • 55% Divorced/Separated/Widowed • 52% No children at home • 52% Heard NoVa transit news recently



Transportation Options (21%)
• 32% Arlington County • 25% Don't drive to work • 25% HHI $50k to $99k • 26% Unemployed • 31% Black • 25% Children at home • 26% Renters • 26% Aware of NVTA • 31% Aware of TransAction



Convenient Access (17%)
• 27% Lived in region for 6-10 years • 25% HHI <$50k • 35% High school education or less • 29% Ages 18-24 • 22% Hispanic • 26% Asian • 23% Single • 21% Children at home • 20% Drive to work • 21% Non-Influencer • 21% Haven't heard NoVa transit news recently



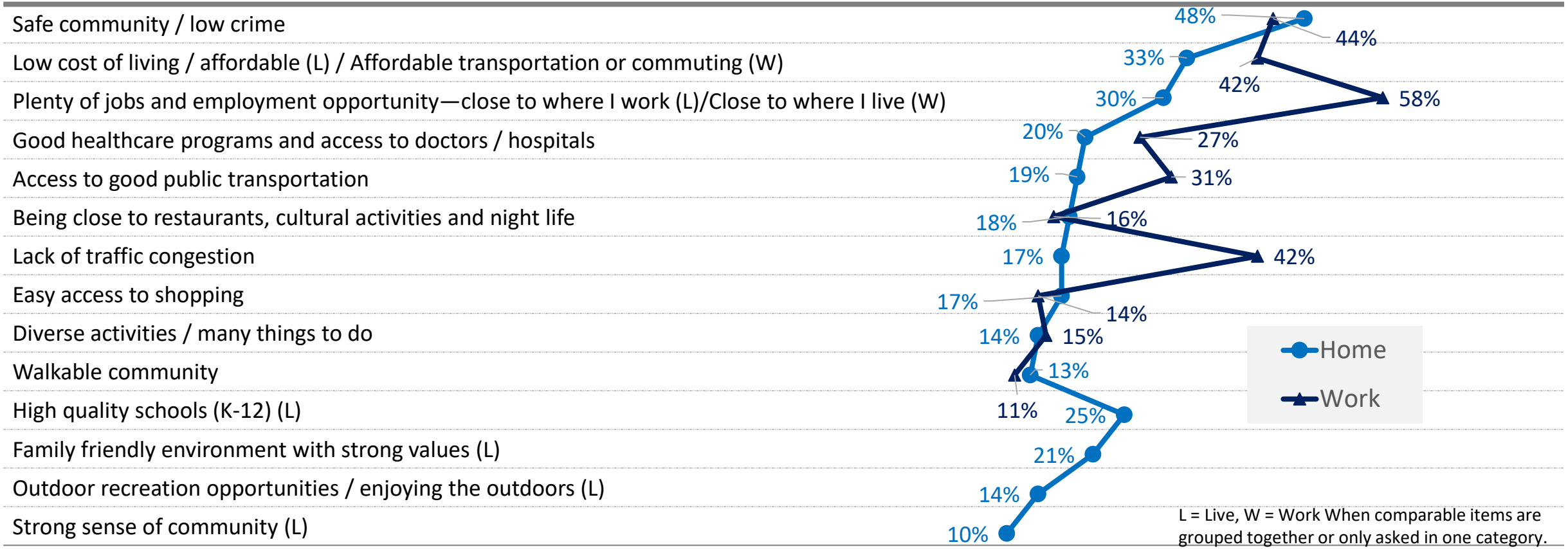
Transportation Infrastructure (16%)
• 23% Some College • 22% Aware of TransAction • 21% Heard NoVa transit news recently

BASE: ALL RESPONDENTS (2019 n=616)
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

Residents focus on essentials like safety, affordability, opportunity, and ease of commuting when considering where to live or work. "Social" opps and walkable communities are secondary.

Factors Influencing Where to Live / Work



L = Live, W = Work When comparable items are grouped together or only asked in one category.

BASE: ALL RESPONDENTS (2019 n=616)
Q760. There are several factors that influence people's decisions about where they choose to live. Please consider the items listed below and select the three (3) which are the most important to you.
Q761. There are several factors that influence people's decisions about where they choose to work. Please consider the items listed below and select the three (3) which are the most important to you.

NVTA's TransAction

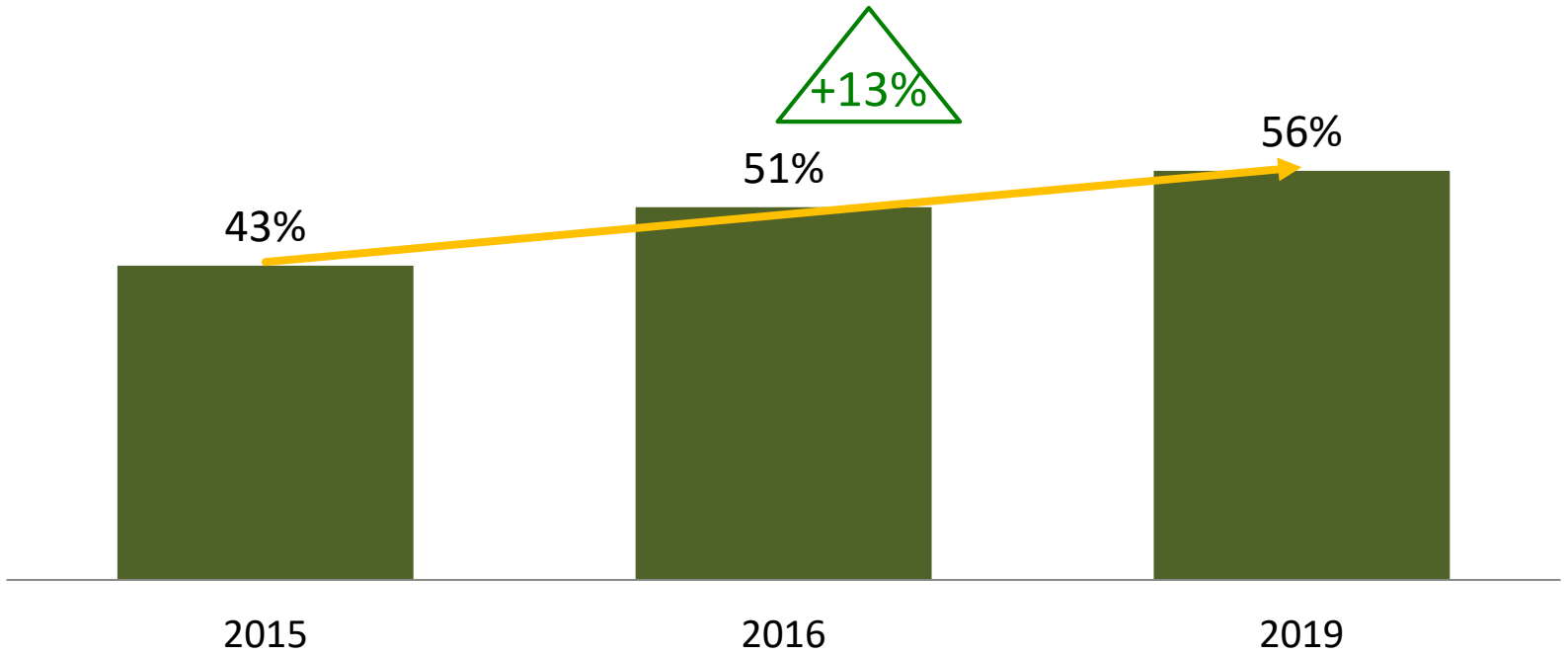
Transportation

REGIONAL VALUES

A majority (56%) say the region is doing a mostly "good job" across key priorities. This is a significant jump of +13 points since the benchmark wave.

Region is Doing a Mostly "Good Job" on Top Priorities

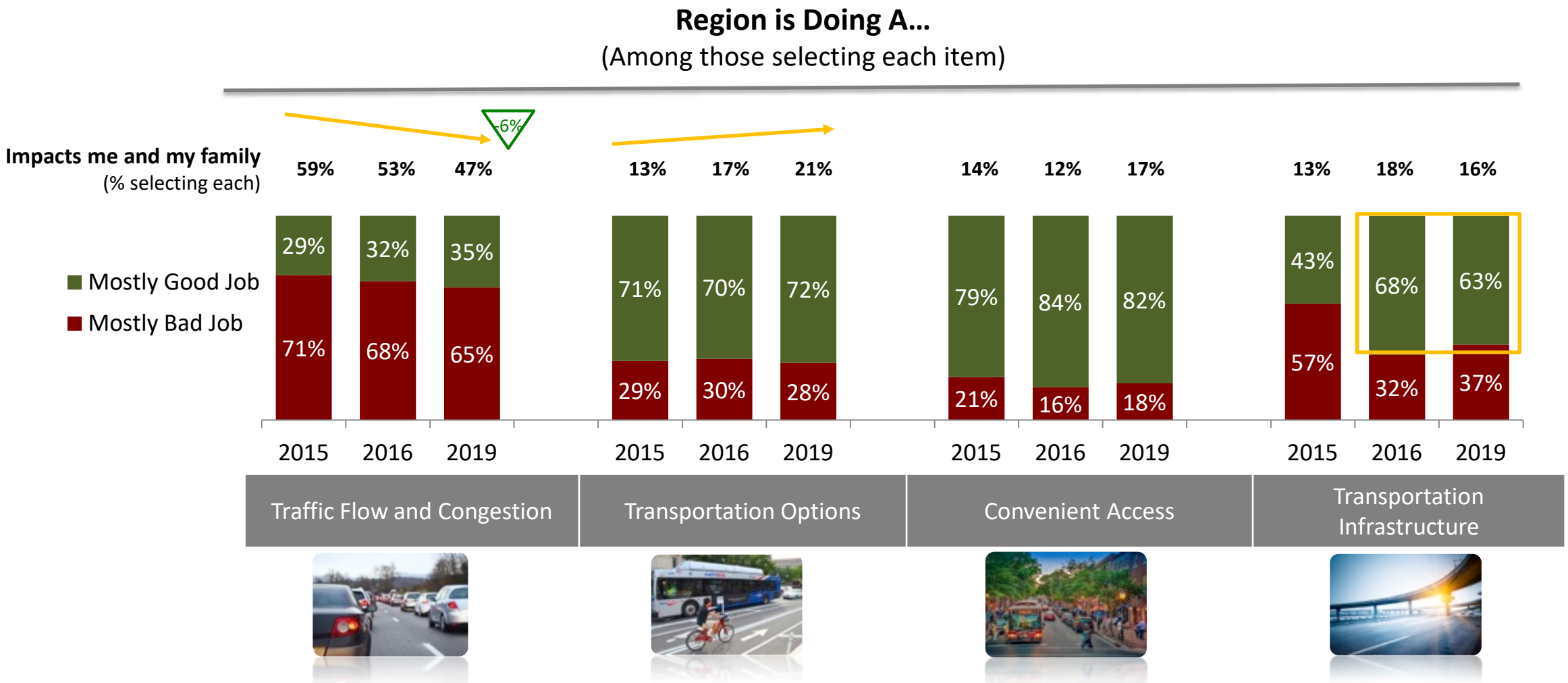
(Total Respondents)



BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616)
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

Number of residents saying the region is doing a mostly "good job" at managing congestion continues to grow.



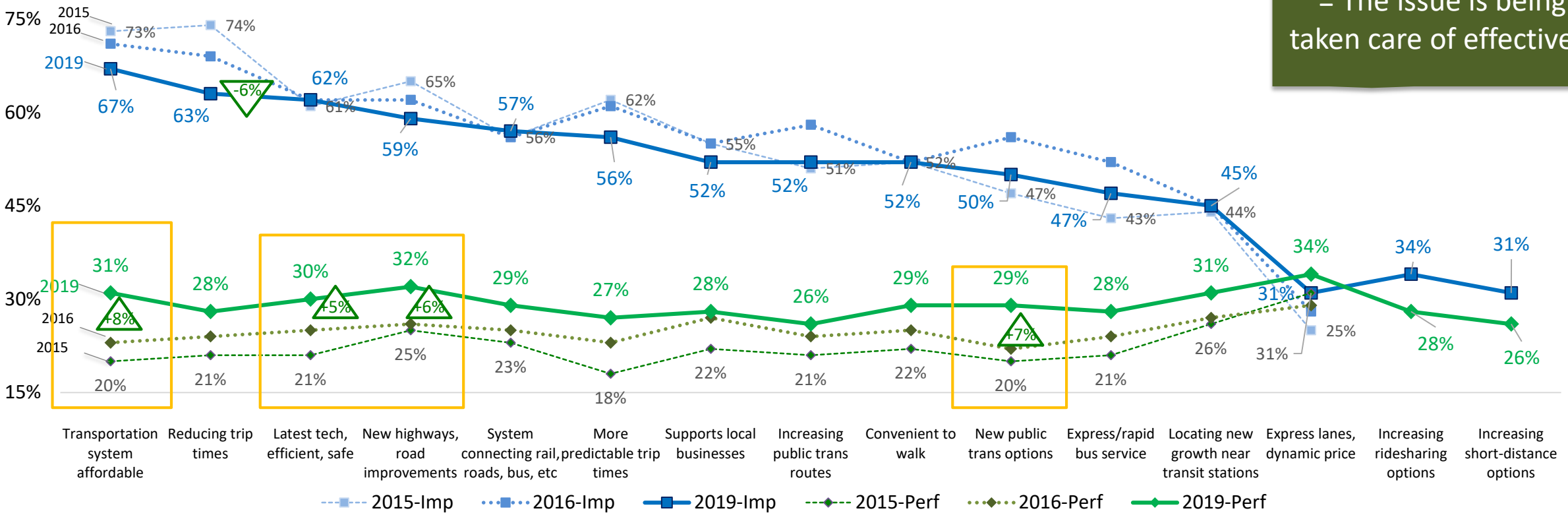
BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616). Q520. Northern Virginia residents and workers have mentioned different factors relating to transportation—both positive and negative—that contribute to or detract from their quality of life. Thinking about transportation here in this region 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? BASE: AMONG THOSE SELECTING EACH - TRANSPORTATION OPTIONS (2015 n=76, 2016 n=97, 2019 n=122); TRANSPORTATION INFRASTRUCTURE (2015 n=85, 2016 n=101, 2019 n=97) CONVENIENT ACCESS (2015 n=84, 2016 n=71, 2019 n=97) TRAFFIC CONGESTION (2015 n=365, 2016 n=337, 2019 n=288). Q530–Q560. Currently, when it comes to [ANSWER FROM Q520], do you feel that the region is doing a good job or a bad job?

Denotes statistically significant differences between 2016 and 2019 (p<.05)

Performance is improving across all priorities.

Importance & Performance Over Time of Regional Transportation Priorities*

Declining Importance + Improving Performance = The issue is being taken care of effectively



*% rating each 8-10 on 10-pt scale

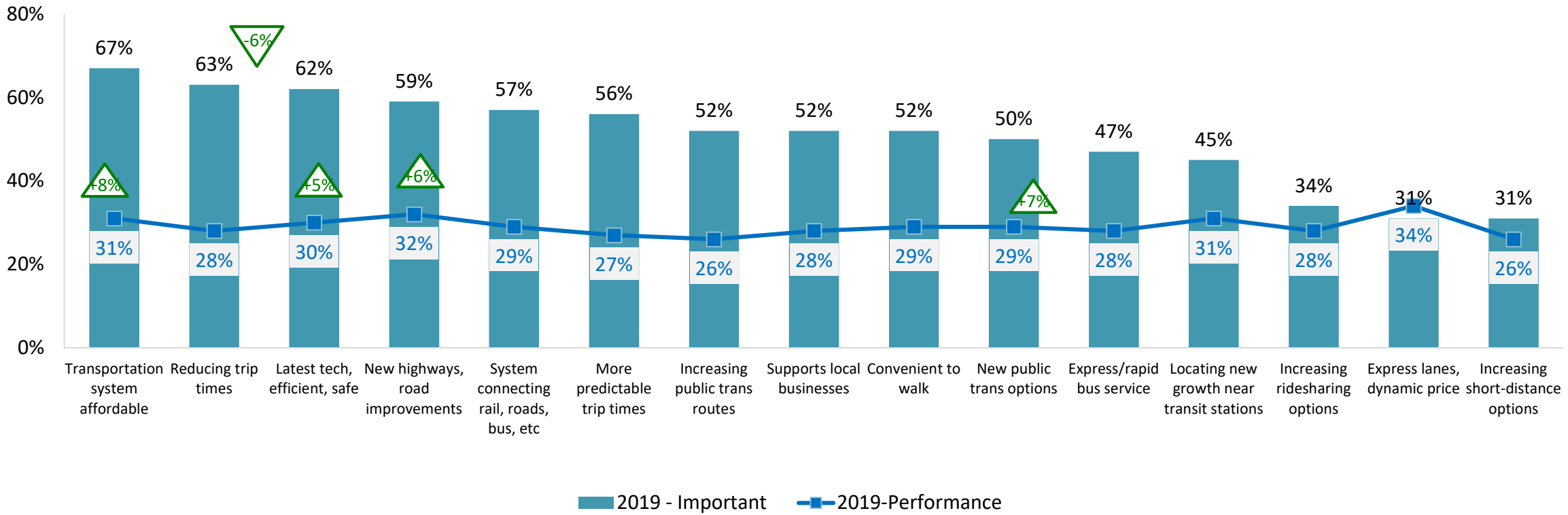
BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616)
Q600. Thinking specifically about transportation issues and priorities, please rate each of the following where 1 means 'Not at all important to the future of the region" and 10 means "Extremely important priority for the future of the region."
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.

Denotes statistically significant differences between 2016 and 2019 (p<.05)

NVTA's TransAction

Keeping the transportation system affordable, reducing trip times, and using the latest tech remain the most important priorities in 2019.

2019: Importance & Performance of Regional Transportation Priorities*



*% rating each 8-10 on 10-pt scale

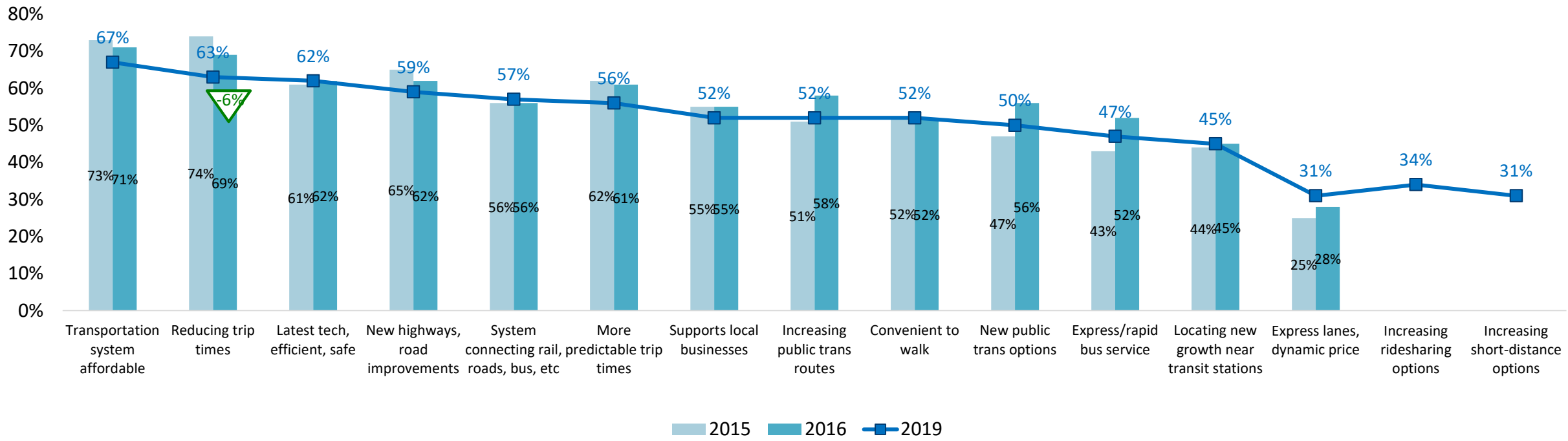
BASE: ALL RESPONDENTS (2019 n=616)
Q600. Thinking specifically about transportation issues and priorities, please rate each of the following where 1 means 'Not at all important to the future of the region" and 10 means "Extremely important priority for the future of the region."
Q605. Please indicate 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.

Denotes statistically significant differences between 2016 and 2019 (p<.05)

NVTA's TransAction

Importance either declines or remains stable for all priorities …

Importance Over Time of Regional Transportation Priorities*



*% rating each 8-10 on 10-pt scale

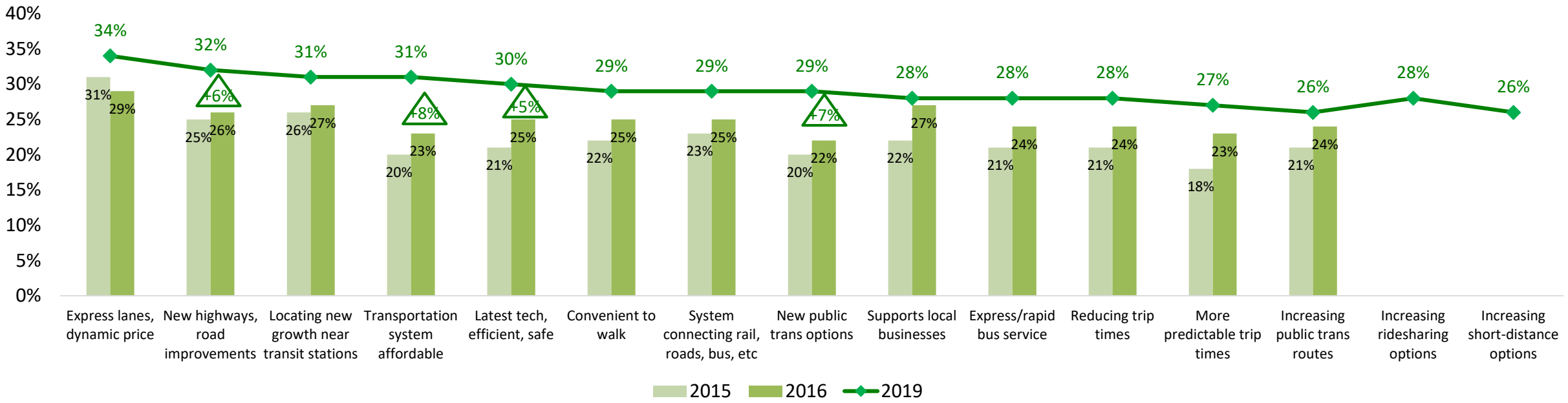
BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616)
Q600. Thinking specifically about transportation issues and priorities, please rate each of the following where 1 means 'Not at all important to the future of the region" and 10 means "Extremely important priority for the future of the region."

Denotes statistically significant differences between 2016 and 2019 (p<.05)

NVTA's TransAction

While performance ratings increase, but there is still room for improvement.

Performance Over Time in Regional Transportation Priorities*



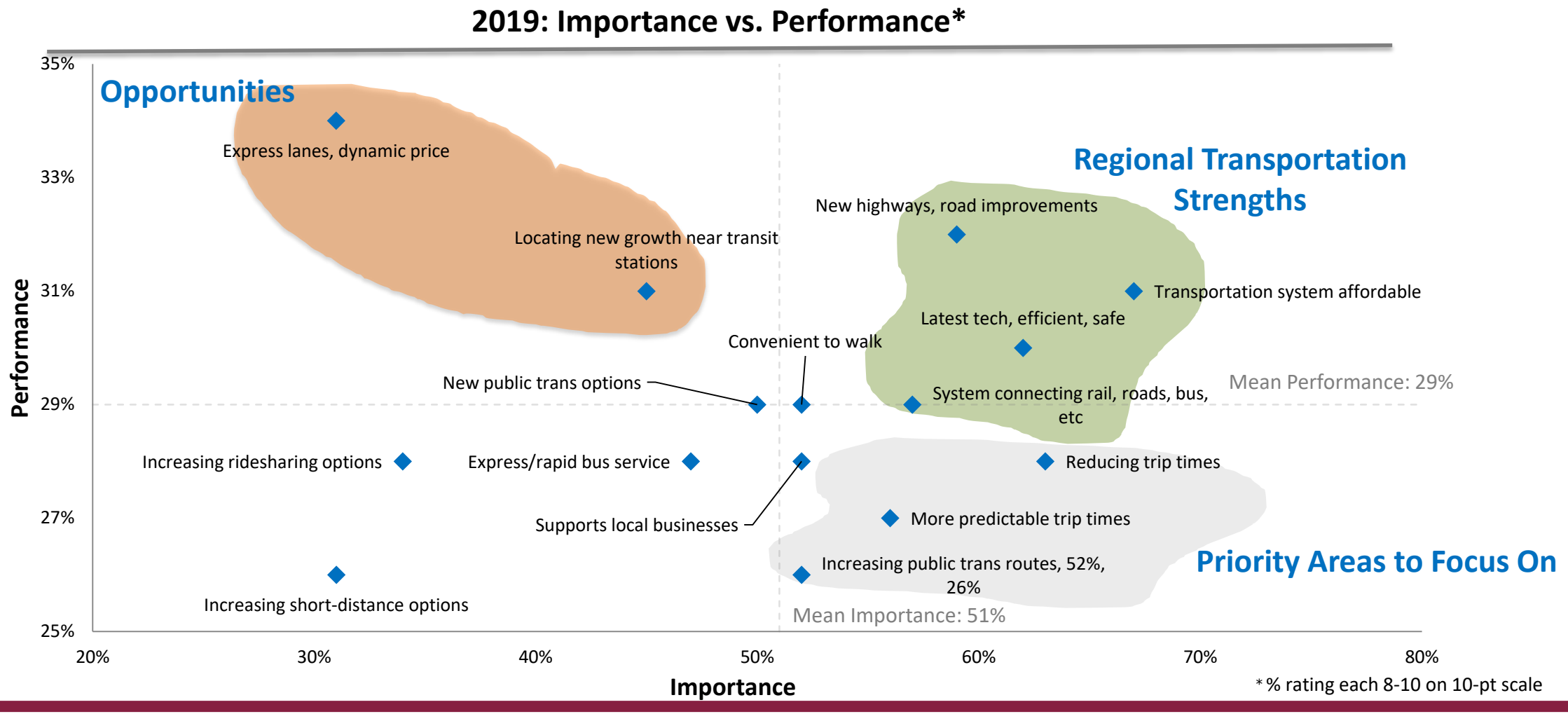
*% rating each 8-10 on 10-pt scale

BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616)
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.

Denotes statistically significant differences between 2016 and 2019 (p<.05)

NVTA's TransAction

Priority areas to focus on: Reducing trip times, more predictable trip times, and increasing public transit services and routes.



BASE: ALL RESPONDENTS (2019 n=616)

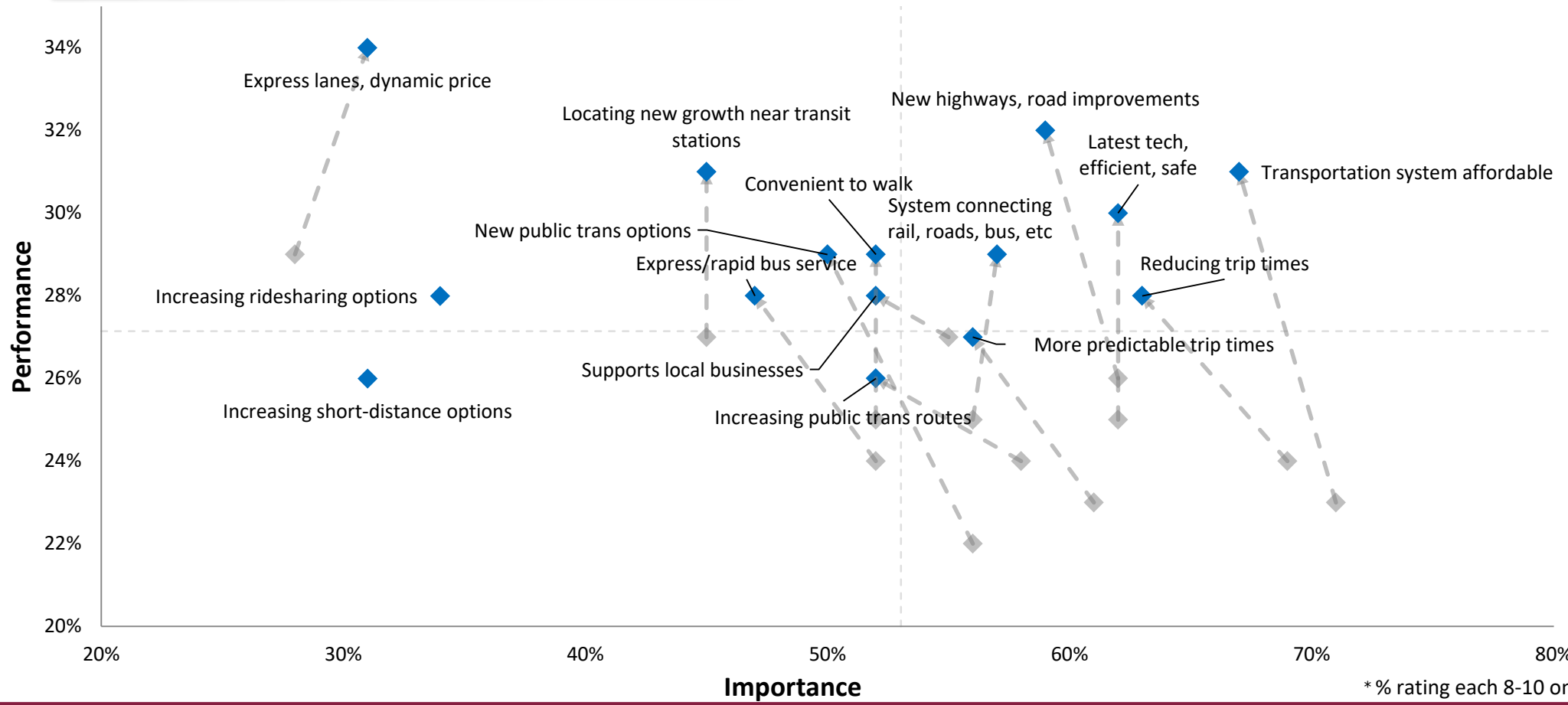
Q600. Thinking specifically about transportation issues and priorities, please rate each of the following where 1 means 'Not at all important to the future of the region" and 10 means "Extremely important priority for the future of the region."

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.

NVTA's TransAction

The region sees improved performance in priority areas from last wave.

2016 to 2019: Importance vs. Performance*



* % rating each 8-10 on 10-pt scale

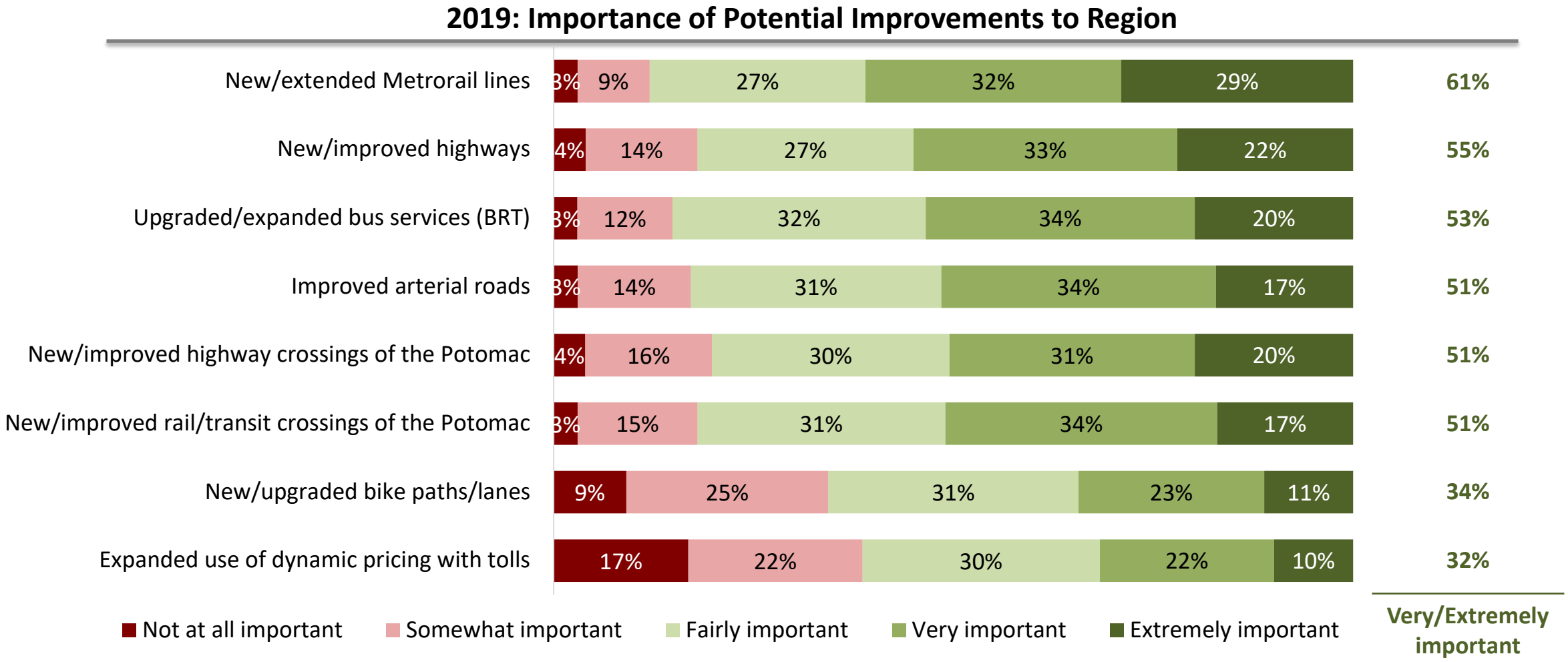
BASE: ALL RESPONDENTS (2016 n=606, 2019 n=616)

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.

NVTA's TransAction

All approaches are perceived as important to the region, with new/extended metro rail lines being the most important.



BASE: ALL RESPONDENTS (2019 n=616)
Q620B. Now, thinking about potential projects and improvements in the region, please indicate how important you think each one is.

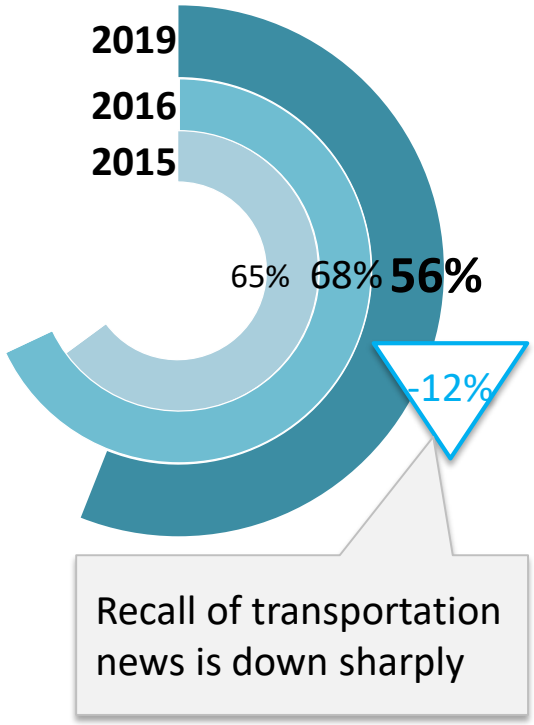
NVTA's TransAction

Transportation

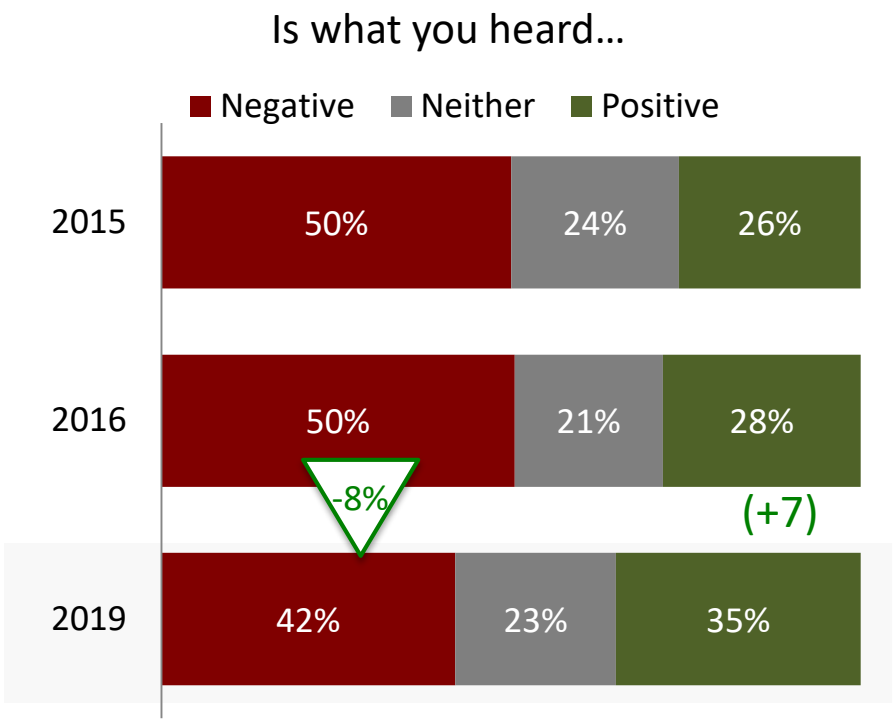
NEWS RECALL

Recall of positive news increases from prior waves. The gap between recall of positive and negative news narrows to 7 points.

Heard Something Recently



Top-of-Mind Transportation Issues



Most Likely to Hear Something *Positive in 2019*:

- 53% Loudoun County, 48% Prince William county
- 41% Live and work in the same county/city
- 40% Lived in region majority of life

- 45% Male
- 47% Children at home

- 47% Aware of NVTA
- 56% Aware of TransAction
- 46% Aware of NOVA Rides
- 60% Aware of 2+ Bus system initiatives

- 65% Good NVTA performance
- 53% Good NoVa performance

Most Likely to Hear Something *Negative in 2019*:

- 48% Fairfax County (incl. Falls Church)
- 50% Not lived in region majority of life

- 52% Female
- 57% Asian or Multi-race
- 47% No children at home

- 52% Non-Influencers
- 47% Unaware of NVTA
- 46% Unaware of TransAction
- 46% Unaware of NOVA Rides

BASE: : ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616)
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 (2019 n=363); Consider it Positive 2019 (n=121), Consider it Negative 2019 (n=149)
Q405. Would you consider what you have heard, read, or seen positive or negative?

Denotes statistically significant differences between 2016 and 2019 (p<.05)
( ) #s in parenthesis are of interest, but are not statistically significant at p<.05 level

Positive story recall is primarily about roads and metro/WMATA.

Top-of-Mind Transportation Issues

Positive

- **35% Road Mentions**
  - *Opening the new EZ Pass lanes on 395 inside the beltway.*
  - *Approved a road bond to address some of the issues with road problems in Prince William County.*
  - *They plan on expanding RT 28 and certain roads in Manassas.*
- **29% Metro/WMATA Mentions**
  - *The completion of the metro silver line in Ashburn, VA.*
  - *I've heard of new metro stations being opened in my area (Herndon/Dulles) and near Dulles airport.*
  - *There is a train that is going to go between Richmond and DC.*
- **12% I-66 Mentions**
  - *Express lanes on 66, expansion on 66, metro making improvements to correct deferred maintenance.*
  - *Major construction of additional lanes on 66. Addition of toll lanes on beltway and 66.*
- **10% HOV/Express Lanes Mentions**
  - *HOV lanes from beltway to DC line,. Most important to me is attention to the gridlock on I 95, particularly at Rt 123, and then down to Fredericksburg.*
- **10% Traffic/Congestion Mentions**
  - *Plans to improve traffic congestion around the Occoquan area on I-95.*
- **7% Bus Mentions**
  - *They are planning on widening Rte. 1 and adding dedicated bus lanes to ease congestion.*

BASE: : ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616)
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 AND CONSIDER IT POSITIVE (2019 n=121)
Q405. Would you consider what you have heard, read, or seen positive or negative?

Negative story recall is primarily about metro/WMATA, roads, and traffic congestion.

Top-of-Mind Transportation Issues

Negative

- **33% Metro/WMATA Mentions***
  - *There may… be a delay for opening of new metro stations. Similarly, several stations between Vienna and Falls Church will be closed next summer.*
  - *The extension of the silver line of the metrorail will be delayed due to contractor's shortfalls. It will cost substantially more money to correct these shortfalls.*
- **30% Road Mentions****
  - *Turning a lane of Seminary Road… into a bike lane, which I absolutely opposed since it clogs traffic more than it previously was. Adding toll lanes on 395.*
  - *Most of the news on transportation has been related to toll roads and traffic congestion in the Washington DC metro area.*
- **28% Traffic Congestion Mentions****
  - *Concerns regarding increase in traffic once Amazon HQ arrives in crystal city.*
- **21% Tolls****
  - *Lots of projects; not enough money; more toll roads; more limited access roads for those who can afford them.*
- **10% Bus Mentions****
  - *Bus strike/Bus drivers on strike.*
  - *One of the things I've read recently about transportation issues is that a big group of our bus drivers are officially boycotting*
- **8% I-66 Mentions***
  - *I have read that 66 is being widened. Also that inbound 66 has had tolls as high as $46 for a drive of a few miles*
  - *I-66 is under construction for the installation of toll express lanes, with commuter lots.*
  - *Route 66 will eventually be a toll road and all lanes would require an easy pass.*

- * Down significantly from 2016
- ** Up significantly from 2016

BASE: : ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616)
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 AND CONSIDER IT NEGATIVE (2019 n=143)
Q405. Would you consider what you have heard, read, or seen positive or negative?

Changes in Number and Types of Comments about WMATA Over Waves

Changes in Number and Types of Comments about WMATA

	2015	2016	2019
Metro/WMATA (Net)	45%	62%	33%
Metro having problems/issues	17%	18%	8%
Metro service delays	5%	2%	7%
Metro service negative mentions	2%	15%	5%
Metro funding issues	2%	6%	3%
Metro safety/accidents/derailments	4%	7%	3%
Metro construction issues	1%	1%	3%
Metro leadership negative mentions	5%	1%	3%
Metro Silverline negative mentions	4%	3%	2%
Metro Orange line negative mentions	2%	1%	2%
Metro increase rates/fees	6%	1%	1%
Metro fire/smoke issues	3%	2%	-
Metro decline in ridership	2%	1%	-
Metro Blue line negative mentions	2%	1%	-
Metro maintenance issues	1%	10%	-
Metro equipment negative mentions	3%	1%	-
Metro SafeTrack negative mentions	-	3%	-
Other negative Metro/WMATA mentions	3%	6%	1%

BASE: HEARD, READ, SEEN TRANSPORTATION ISSUES AND CONSIDER IT NEGATIVE (2015 n=206, 2016 n=213, 2019 n=143)
Q400. What, if anything, have you heard, read or seen recently regarding transportation issues, actions or news in the Northern Virginia region?

Use of social media as an information source increases with Facebook dominating. Use of print media declines significantly.

Most Recent Information Sources for Transportation Issues

	2015 (n=363)	2016 (n=411)	2019 (n=400)
Television/News story	54%	57%	49%
Social Media	24%	31%	38%
Print article or ad In newspaper, magazine, flyer or information packet	46%	45%	36%
Radio ad/news/discussion	41%	38%	32%
Website	8%	9%	9%
Community Meeting	7%	9%	10%
Other	7%	4%	10%
Do not recall	3%	3%	–

(-8) (+7) (-11) (-6)

Source	2019
Facebook	24%
Twitter	13%
Instagram	12%
Other social media	10%

Websites mentioned in 2019

- washingtonpost.com
- wtop.com
- arlnow.com
- wmata.com
- ggwash.org
- virginiadot.org
- nextdoor.com

BASE: HEARD, READ, SEEN TRANSPORTATION ISSUES (2019 n=363; 2016 n=411; 2015 n=400)
Q410. Where did you hear or see this information? Choose all the apply.

Denotes statistically significant differences between 2016 and 2019 (p<.05)

( ) #s in parenthesis are of interest, but are not statistically significant at p<.05 level

Younger residents and minorities are much more likely to get their transportation news via social media.

More likely to use social media



50% Alexandria*, 65% Manassas/Manassas Park*

50% Have lived in the region for less than 15 years

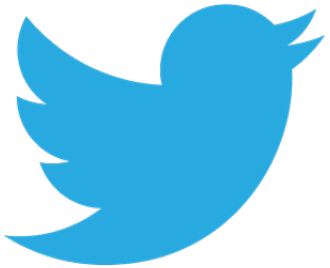
55% Children at home

46% Single

44% Employed/Student

64% High school education or less*

56% Ages 18-45



57% Hispanic*

50% Black*

55% Asian*



56% Aware of TransAction

51% Aware of NOVA Rides

45% Aware of NVTA

70% Aware of 2+ Bus system initiatives



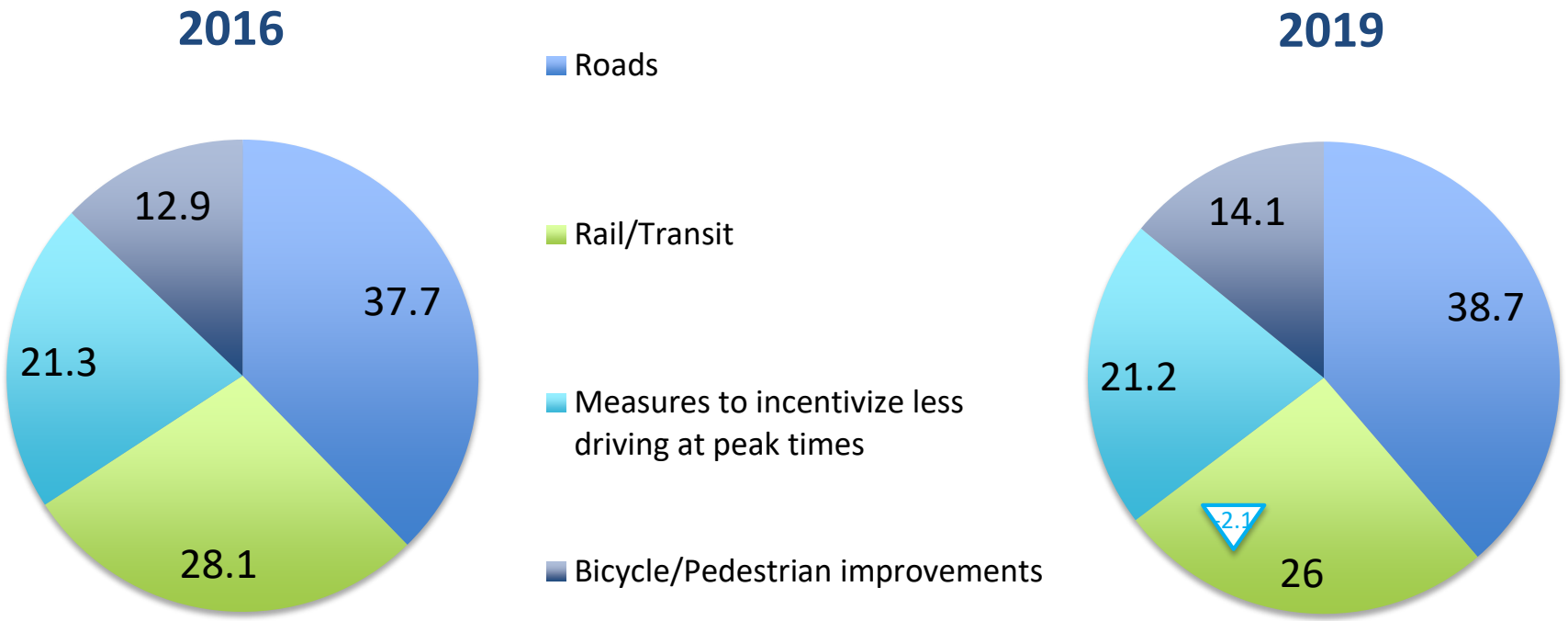
* Extremely small or small base size less than 30, data are directional only.

BASE: HEARD, READ, SEEN TRANSPORTATION ISSUES (2019 n=363)
Q410. Where did you hear or see this information? Choose all the apply.


Transportation
MESSAGING

Slight decline in rail/transit spending from last wave. Most spend still goes to roads followed by rail/transit.

Average Point Allocation to Transportation Improvements



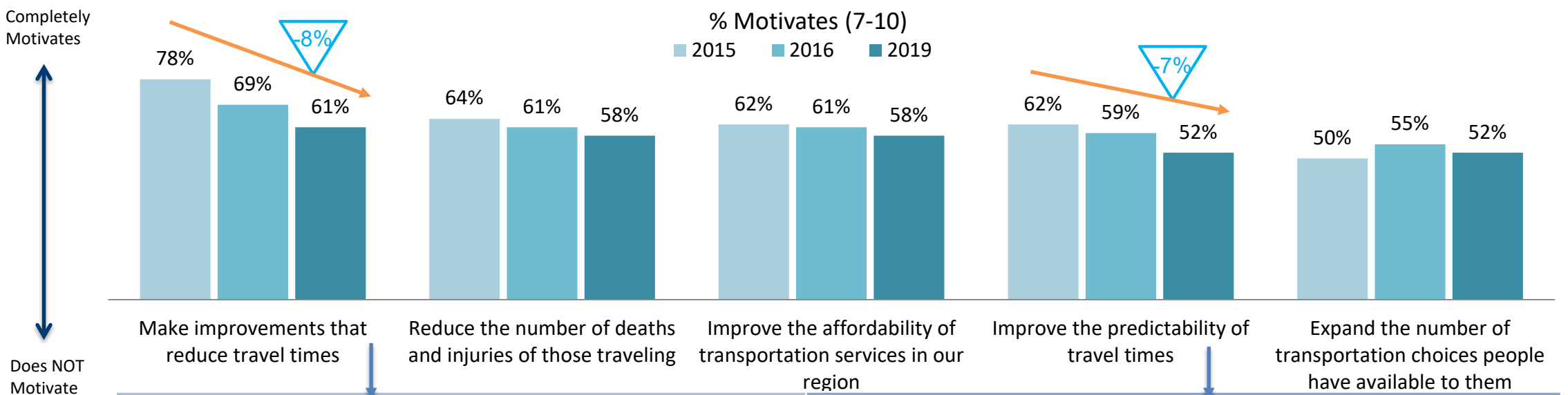
In 2019, Arlington County residents allocate a lesser portion towards roads while Fairfax County and Arlington County residents allocate a greater portion towards rail/transit.

BASE: ALL RESPONDENTS (2016 n=606, 2019 n=616)
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…

Denotes statistically significant differences between 2016 and 2019 (p<.05)

Reducing/Improving travel times continues to lose ground as do other strategies.

Motivates Interest and Support



2019 -"Make Improvements that Reduce Travel Time" Most Likely to Motivate Interest and Support of:		2019 - "Improve the predictability of Travel Times" Most Likely to Motivate Interest and Support of:	
• 69% Live and work in diff. county/city; (75% Work in DC) • 64% Drive to work • 65% HHI $100K+ • 66% Ages 35+ • 66% White • 68% Married/Living with partner	• 66% Influencers • 73% Aware of NVTA • 74% Aware of NOVA Rides • 76% Aware of 2+ Bus system initiatives • 70% Heard NoVa transit news recently	• 57% HHI $100K+ • 60% Ages 35–54 • 58% Children at home • 58% Influencers • 59% Aware of NVTA	• 64% Aware of NOVA Rides • 69% Aware of 2+ Bus system initiatives • 59% Heard NoVa transit news recently

BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616)
Q705. The following are strategies to help fulfill the regional values and priorities we have been talking about. There are different ways to talk about these priorities and goals. Please indicate the degree to which the goal captures and motivates your interest and support by rating the statements from 1 to 10 where 1 means "does not motivate your interest and support at all" and 10 means "completely motivates your interest and support".

Denotes statistically significant differences between 2016 and 2019 (p<.05)

Perceptions of self-driving cars remain negative.

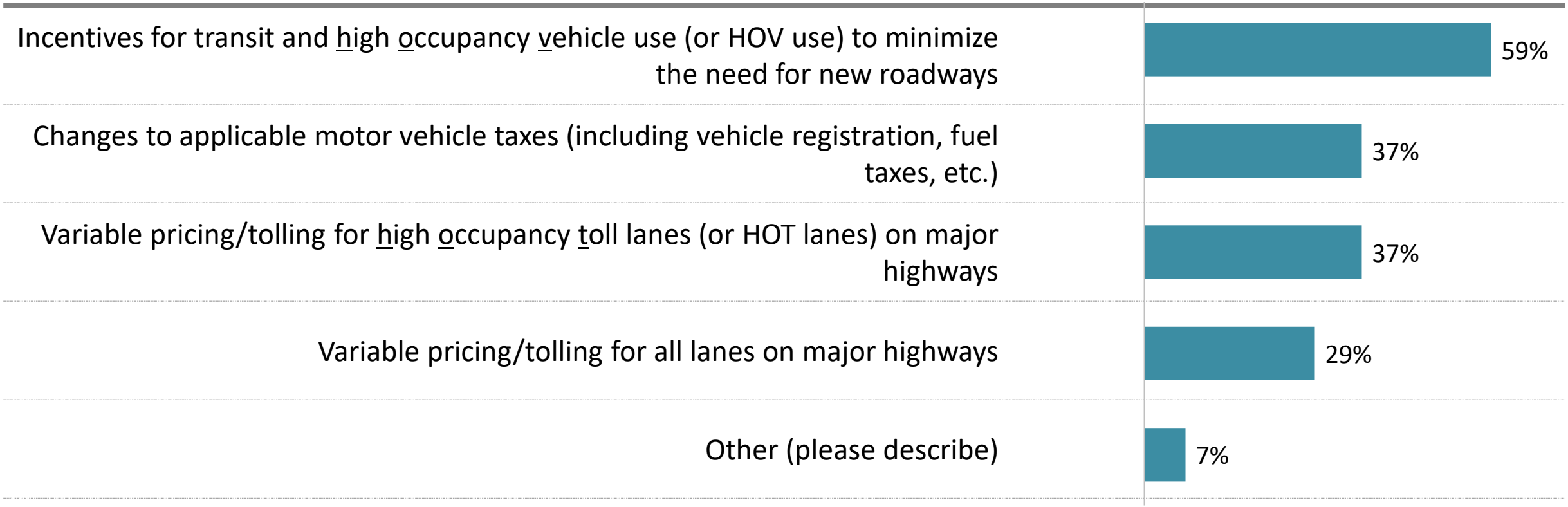
Opinions on Self-Driving Cars



BASE: ALL RESPONDENTS (2019 n=616)
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?

Excluding "incentives," residents are split on how to secure future funding.

Preferred Methods of Funding Future Construction and Maintenance of Transportation Infrastructure



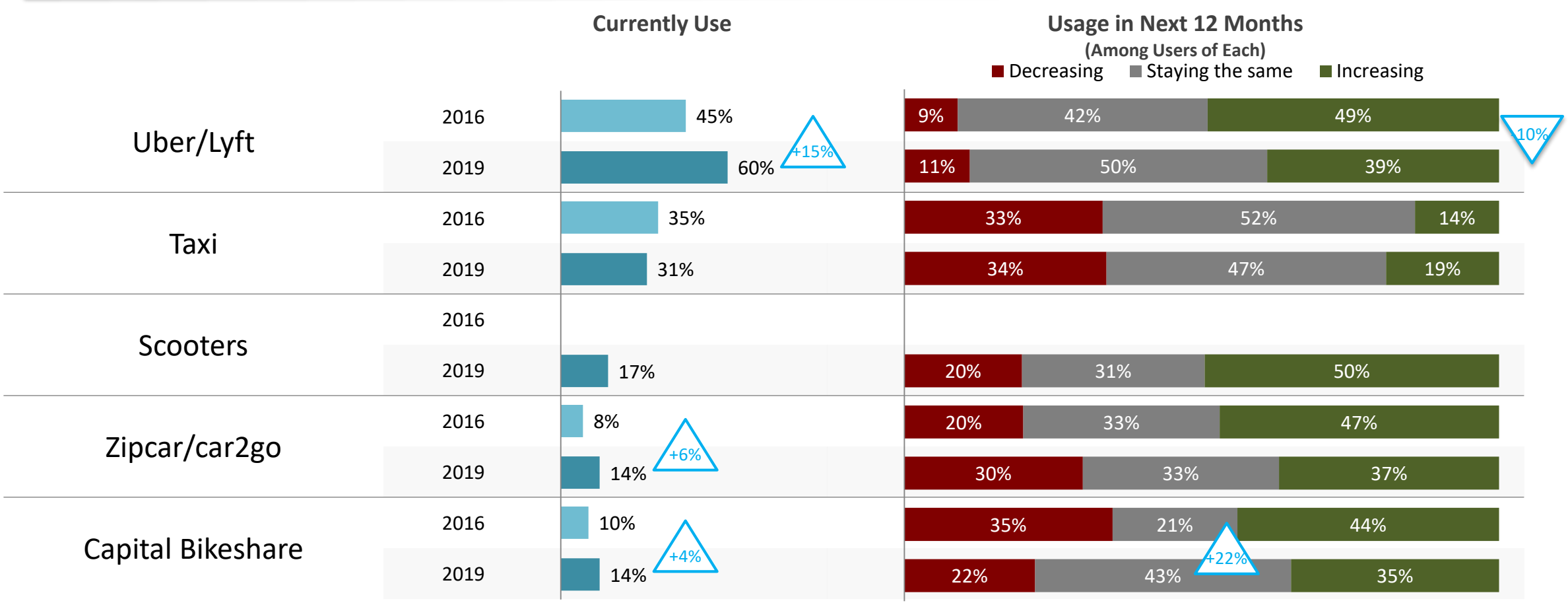
BASE: ALL RESPONDENTS (2019 n=616)
Q762. There are a variety of new ways to fund future construction and ongoing maintenance of the transportation infrastructure in the Northern Virginia Region. Which of the following should be the focus when it comes to new ways of funding construction and maintenance of transportation infrastructure? (Please select all that apply.)

NVTA's TransAction


Transportation
IMPACT OF 21ST CENTURY EXPANDED ALTERNATIVES TO CAR OWNERSHIP AND LIFESTYLE FACTORS

Residents use of ridesharing services has increased, but future growth is flattening.

Usage of Car Ownership Alternatives



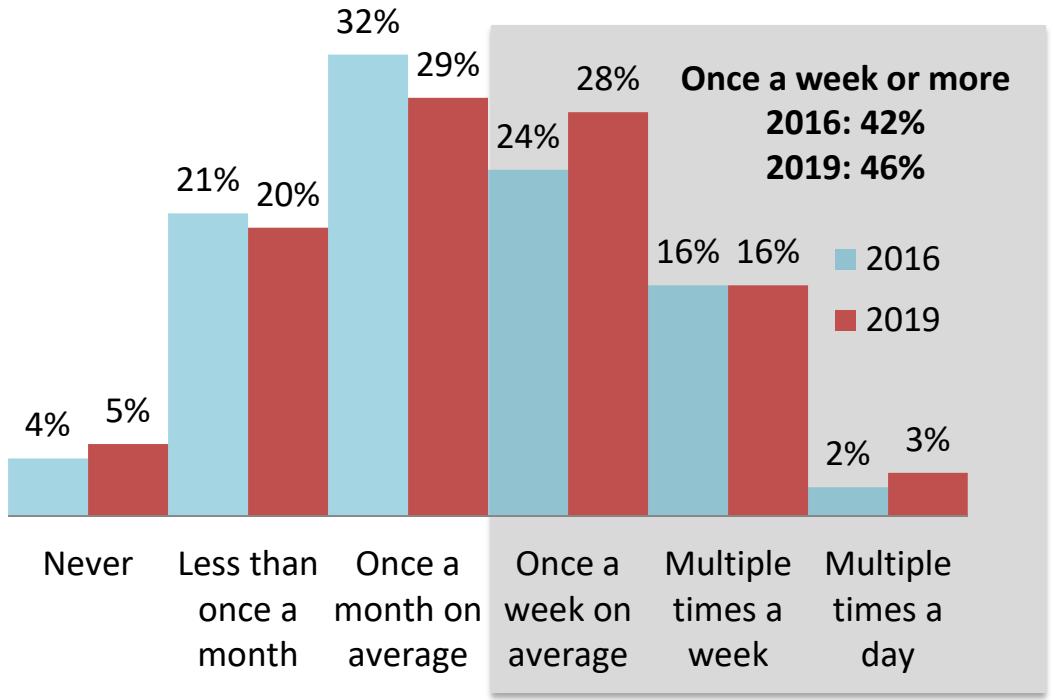
BASE: ALL RESPONDENTS (2016 n=606, 2019 n=616). Q740. There are a number of alternatives to owning a car that are being used by people living in the region. Which of the following do you currently use?
BASE: AMONG THOSE USING EACH SERVICE - UBER/LYFT (2016 n=265, 2019 n=352); Taxi (2016 n=208, 2019 n=189); Scooters (2019 n=94); Zipcar/car2go (2016 n=46, 2019 n=80); Capital Bikeshare (2016 n=55, 2019 n=84). Q745. Do you anticipate your usage increasing, decreasing or staying the same over the next 12 months for each of the following?

Denotes statistically significant differences between 2016 and 2019 (p<.05)

Almost half (46%) of NoVa residents shop online at least once a week, and a fifth (19%) shop online multiple times a week.



Frequency of Online Shopping



BASE: ALL RESPONDENTS (2016 n=606, 2019 n=616)
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

Demographics

		2015	2016	2019
Gender	Male	48%	48%	47%
	Female	52%	52%	53%
Age	18-24	7%	11%	15%
	25-34	22%	22%	22%
	35-44	24%	21%	21%
	45-54	20%	21%	15%
	55-64	15%	14%	15%
	65+	12%	11%	13%
Ethnicity	White	58%	58%	52%
	Hispanic	15%	15%	17%
	Black	11%	11%	12%
	Asian	14%	14%	15%
	Hawaiian/Pacific Islander	*	*	*
	Native American/ Alaskan native	*	*	*
	Multi-race	2%	2%	4%
	Other	*	*	*
Marital	Married/Civil Union	60%	56%	51%
	Single, never married	24%	32%	31%
	Divorced/Separated/Widowed	11%	8%	12%
	Living with Partner	5%	3%	6%
	Decline to answer	*	*	*

		2015	2016	2019
Education	HS or less	5%	7%	13%
	Some college	15%	14%	16%
	Associates Degree	6%	6%	7%
	Bachelor's Degree	35%	37%	31%
	Master's Degree	28%	27%	25%
	Professional Degree	7%	5%	4%
	Doctorate Degree	4%	4%	4%
	Decline to answer	*	*	–
Employment	Employed (NET)	73%	72%	71%
	Full-time	64%	58%	55%
	Part-time	5%	9%	11%
	Self-employed	4%	5%	6%
	Not employed (NET)	15%	16%	20%
	Not employed, looking	2%	1%	3%
	Not employed, not looking	*	1%	1%
	Not employed, unable	*	1%	2%
	Retired	13%	13%	14%
	Student	3%	7%	4%
	Stay home spouse/ partner	8%	5%	4%
	Decline to answer	*	1%	*
Household Income	<$50,0000	13%	16%	24%
	$35,000-$75,000	22%	22%	20%
	$75,000-$100,000	17%	18%	14%
	$100,000-$150,000	25%	21%	19%
	$150,000-$200,000	11%	11%	13%
	$200,000+	11%	10%	12%
	Decline	9%	8%	6%

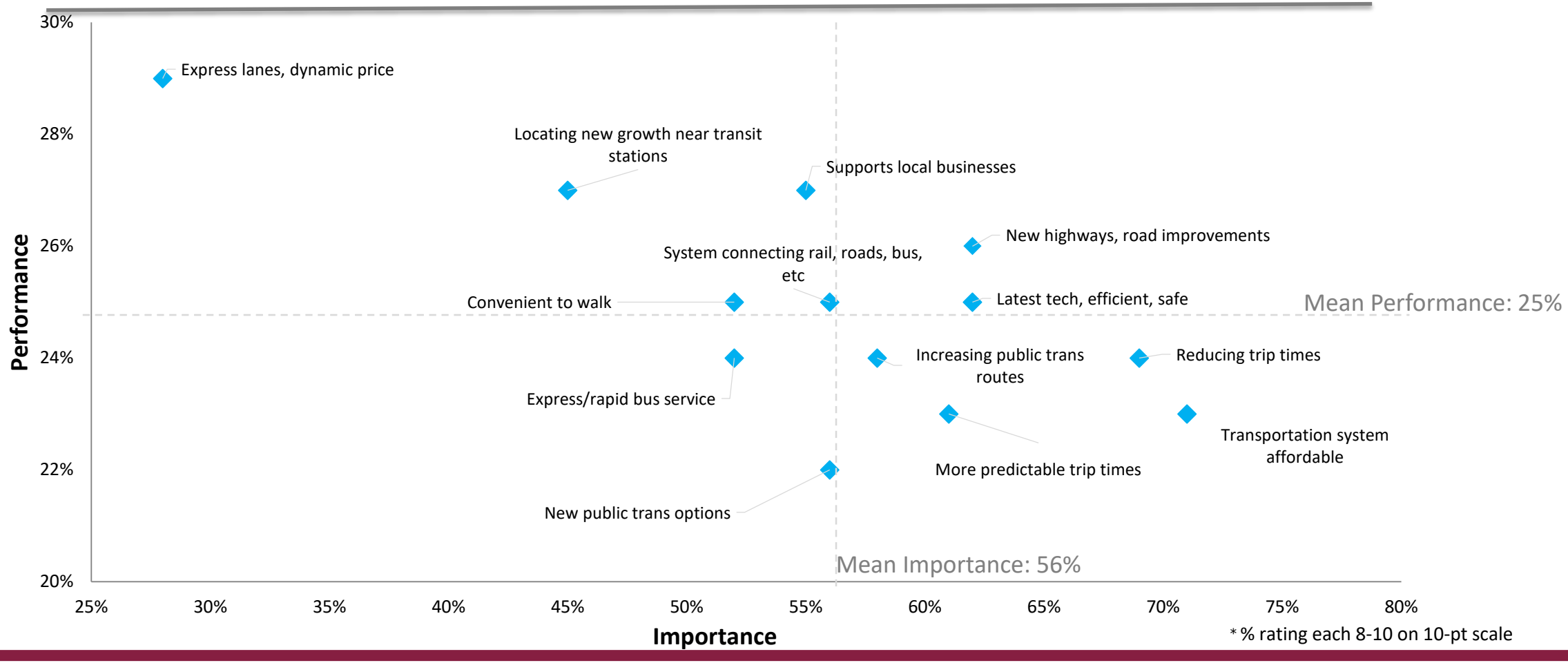
Statistically significant differences at p <05% level between 2019 and 2016 are highlighted in orange

Transportation

APPENDIX: PRIOR WAVE DATA

In 2017, NVTA should continue to focus its efforts on reducing trip times and making transportation affordable, but by way of new transportation options and technologies.

2016: Importance vs. Performance*



* % rating each 8-10 on 10-pt scale

BASE: ALL RESPONDENTS (2016 n=606, 2019 n=616)

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.

NVTA's TransAction