

## DRPT's 2015 Virginia Statewide Travel Study

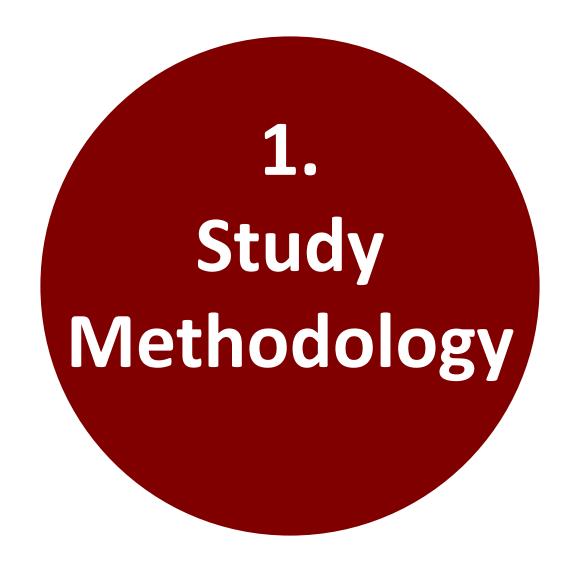
What It Means for Us and Our Elected Officials

As Presented by John W. Martin at VTA's 2016 Annual Conference on May 24, 2016



#### Today's Agenda

- Study Methodology
- 2. 7 Key Findings
- 3. What This All Means
- 4. What to Do Next



# By the Numbers

## Objectives

#### **Objectives**

- 1. Obtain data on **travel behavior**, for both work and non-work trips.
- Assess awareness of transit service options and growth potential.
- 3. Assess awareness of transit and commuter assistance services and programs and the effectiveness of these programs.
- Assess attitudes about travel and transportation in the Commonwealth.
- 5. Develop past and future comparisons:
  - Track changes by replicating—to the extent possible—a comparable study conducted in 2007 (2007 Virginia State of the Commute).

## Two Waves 2007 and 2015

#### 2 Sample Sets in 2015

#### **Telephone and Online**

- This 2015 study is based on the Virginia State of the Commute Benchmark Study, conducted in 2007.
- The 2007 study was conducted as a telephone survey.
- Due to the increasing difficulty and expense of conducting telephone surveys, future statewide travel studies will be conducted via the internet.
- To "bridge" the transition from all-telephone data collection to all-internet data collection, this project consists of two components: a statewide telephone survey and a statewide internet survey.

#### Qualifications

Telephone Survey	Internet Survey		
Respondents were employed residents of Virginia, ages 18 and older, selected by random digit dialing.	Both employed and not- employed Virginia residents, ages 18 and older, were eligible to participate in the survey.		

#### 9,954 2015 Interviews

#### **Survey Methodology**

	Telephone Survey	Internet Survey
Field dates	June 1–July 10, 2015	June 1–July 24, 2015
Sample size	5,185*	4,769

<sup>\* 2,305</sup> interviews were collected in 2015; 2,880 interviews collected in Northern Virginia in the comparable 2013 (MWCOG) State of the Commute Study were appended to the file of 2015 survey interviews for a total of 5,185 interviews.

## Regions

#### Markets/Sample Areas and Distribution of Sample

	Telephone	Internet
Northern Virginia		
- MWCOG sample	2,800	1,328
- NOVA additional sample	302	
Urban Crescent		
- Fredericksburg area	300	437
- Hampton Roads region	300	587
- Richmond metro area	300	603
Other NOVA Commuter Service Markets		
- Culpeper/Rappahannock-Rapidan	150	261
- Front Royal/Winchester area	151	288
Other Virginia Commuter Service Markets		
- Charlottesville area	150	262
- Middle Peninsula	100	228
- Northern Neck	101	242
- Roanoke/New River Valley	150	274
Commuter Feeder Markets/Non-Served		
- Commuter feeder markets	150	132
- Non-served areas	151	127
TOTAL – Including MWCOG Sample	5,185	
TOTAL – New Data Collection	2,305	4,769

### 2 Firms





## 1 Agency



Virginia Department of Rail and Public Transportation

#### Special appreciation to Chris Arabia

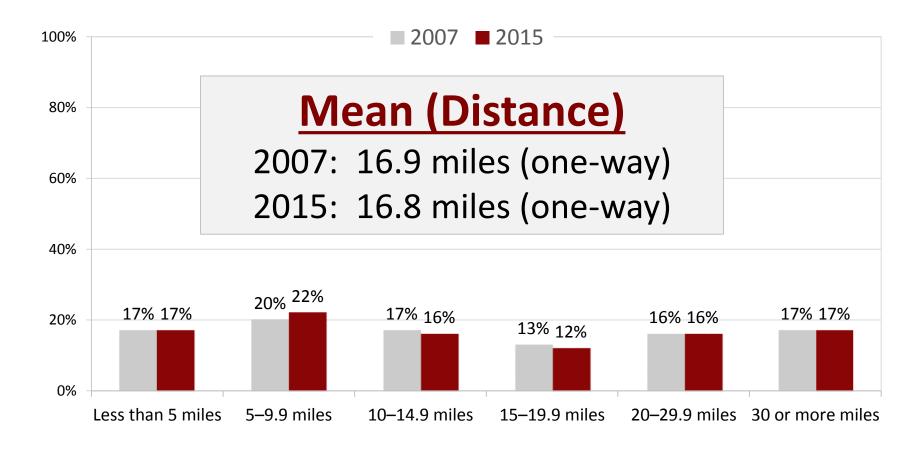


#### Since 2007...

# Commuting Times and Distances Have Not Changed

#### Commuters Travel a Wide Range of Commute Distances

Commute Distances in 2015 Are About the Same as in 2007



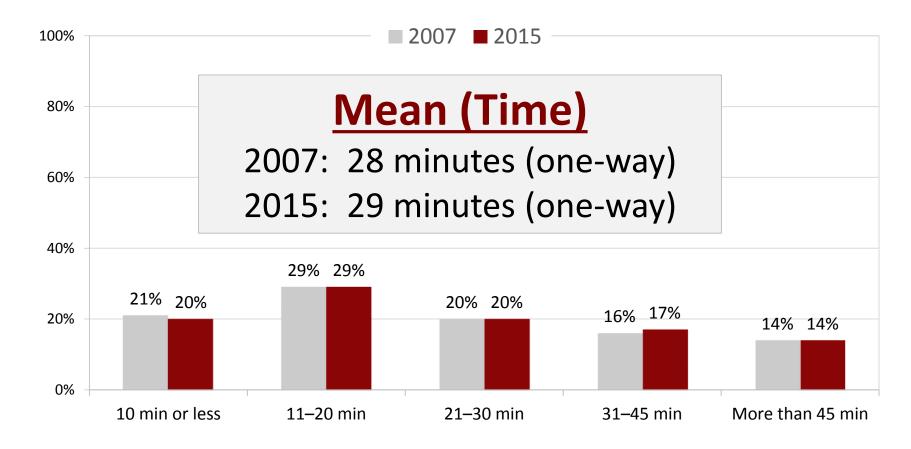
2007 n = 6,012 2015 n = 4.311

2007 Telephone Q17: How long is your typical daily commute one way? How many miles?

2015 Telephone Q16 and 17: How long is your typical daily commute one way? Please tell me both how many minutes and how many miles.

First, how many minutes? ... And how many miles?

#### On Average, Commuters Travel 29 Minutes One-Way—About the Same as in 2007



2007 n = 6,293 2015 n = 4.537

2007 Telephone Q16: How long is your typical daily commute one way? How many minutes?

2015 Telephone Q16 and 17: How long is your typical daily commute one way? Please tell me both how many minutes and how many miles.

First, how many minutes? ... And how many miles?

## Fredericksburg Commuters Have the Longest Trip, Both in Minutes and in Miles; Roanoke Commuters Have the Shortest

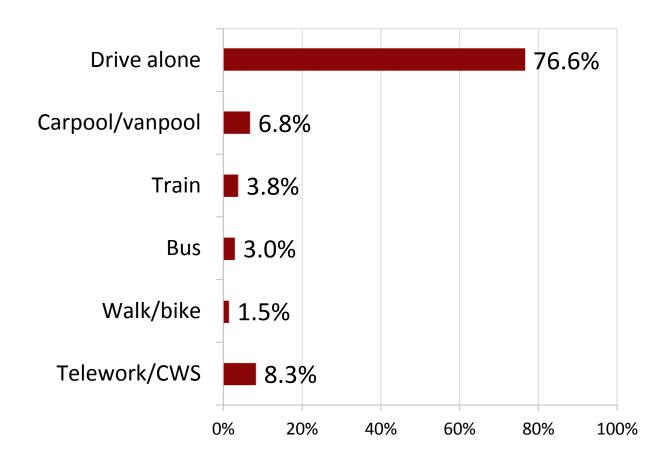
Region	Average Trip in <u>Minutes</u>	
Fredericksburg	45	
Culpeper	41	
Northern Virginia	35	
Front Royal/Winchester	34	
Middle Peninsula	31	
Northern Neck	30	
Statewide	29	
Hampton Roads	26	
Richmond	26	
Charlottesville/ Central Shenandoah	25	
Roanoke/New River Valley	21	

Region	Average Trip in <u>Miles</u>	
Fredericksburg	29	
Culpeper	27	
Front Royal/Winchester	26	
Middle Peninsula	24	
Northern Neck	23	
Richmond	18	
Charlottesville/ Central Shenandoah	18	
Statewide	17	
Northern Virginia	16	
Hampton Roads	16	
Roanoke/New River Valley	15	

## Virginia Has Become More Multimodal

Telephone Survey 2015

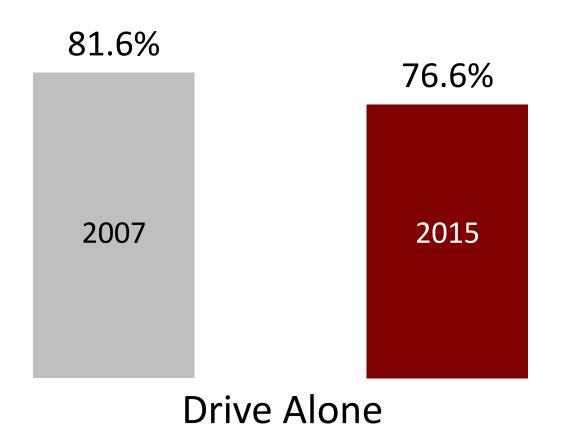
#### Virginia Commuters Make About Three-Quarters of Their Weekly Commute Trips by Driving Alone



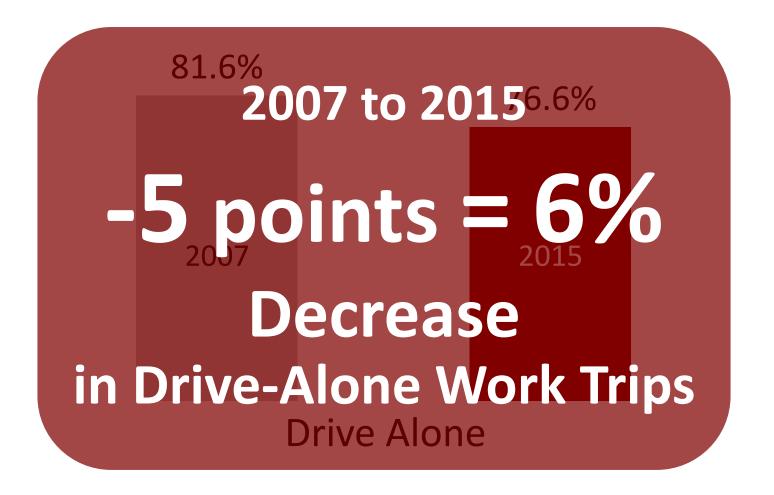
n = 4,659

Excludes employees who are selfemployed with only work location at home

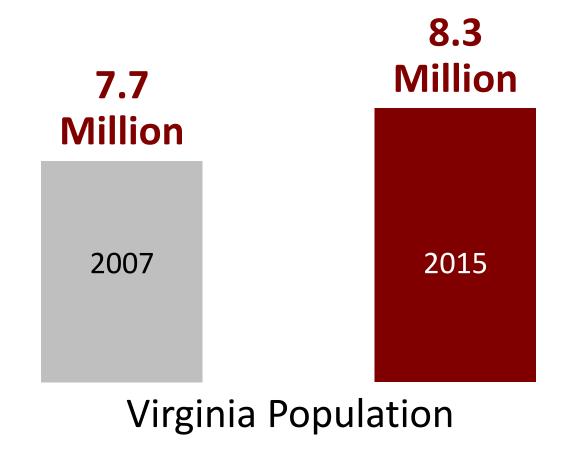
#### Statewide, the **Share of Drive-Alone Work Trips** Has Decreased Since 2007



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#### At the Same Time, Virginia's Population Has Grown

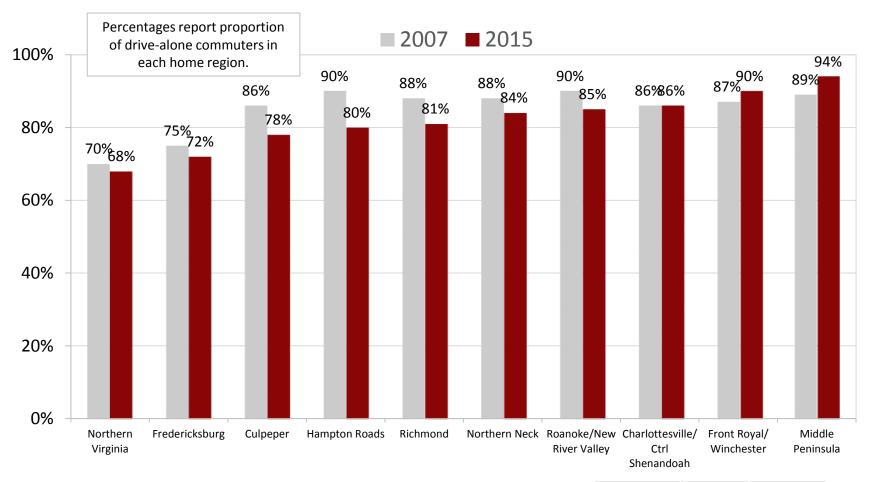


#### At the Same Time, Virginia's Population Has Grown

7.72007 to 2015illion **Million** 7.8% Increase 2007 in Population Virginia Population

#### Which Regions Have Had the Greatest Shifts Away from SOV Drive-Alone?

#### Since 2007, Drive-Alone Rates Have Decreased in 7 out of 10 Regional Markets Across Virginia



Sample sizes not shown due to space limitations.

2007 Telephone Q15: Now thinking about LAST week, how did you get to work each day ... ? 2015 Telephone Q15: Now thinking about LAST week, how did you get to work each day ... ?

	<u>2007</u>	<u>2015</u>
Unserved	91%	89%
Feeder	89%	94%

## Hampton Roads, Culpeper, and Richmond Are Leading the Way in Percentage Decrease in Drive-Alone Rate

Hampton Roads -10 points 11%

Culpeper -8 points 9%

Richmond -8 points 8%

# Which **Generation**Demonstrates Greatest Use of Alternatives to Drive-Alone Modes?

#### Millennials Are More Likely to Walk, Use the Train, and Use the Bus than Are the Other Generations

Modes Used for Non-Work Trips	Millennial	Gen X	Boomer	Silent/ Greatest
Sample size	386	1,186	1,660	530
Drive alone or by taxi	65%	75%	76%	68%
Drive or ride with others in a personal vehicle	78%	68%	63%	66%
Walk	21%	12%	9%	9%
Train	9%	3%	3%	2%
Bus	8%	3%	3%	1%
Bicycle	4%	4%	3%	2%

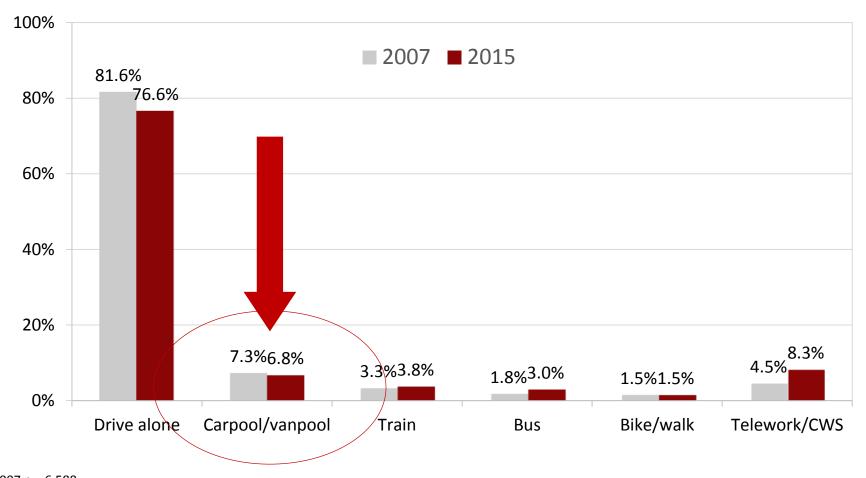
#### Calculated from:

2015 Internet Q43a: Still thinking about yesterday, in the table below, check all the types of transportation you used to make these [non-work] trips.

2015 Internet Q43c: Still thinking about last weekend, in the table below, check all the types of transportation you used to make these [nonwork] trips on Saturday or Sunday.

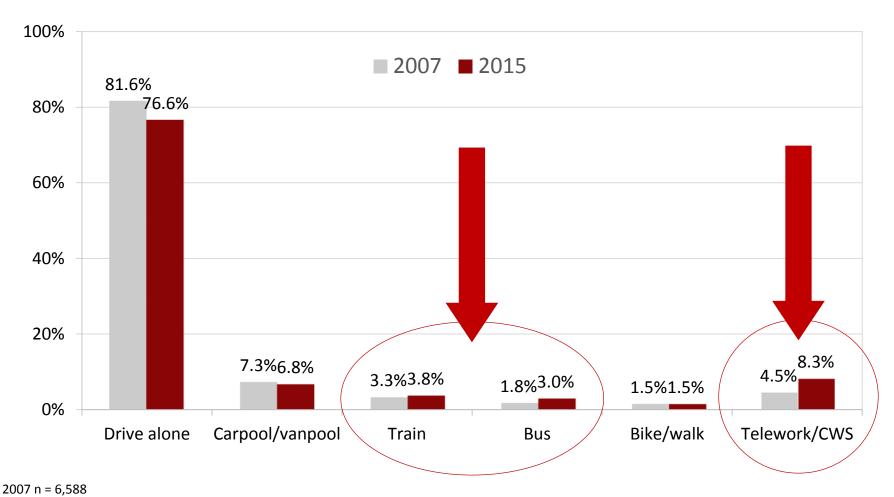
# Use of Transit and Telework Have Increased Dramatically

## Unfortunately, Carpooling and Vanpooling Are Not Growing



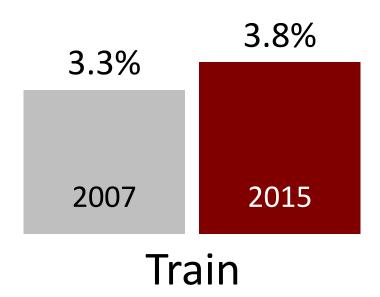
2007 n = 6,588 2015 n = 4,659

### Transit Use and Telework/Compressed Schedule Have Both Increased

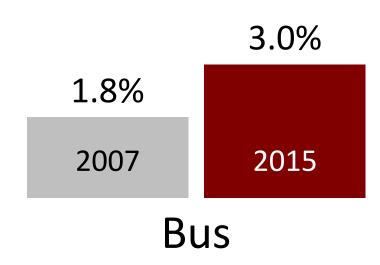


2015 n = 4,659 2007 and 2015 Telephone Q15: Now thinking about LAST week, how did you get to work each day ... ?

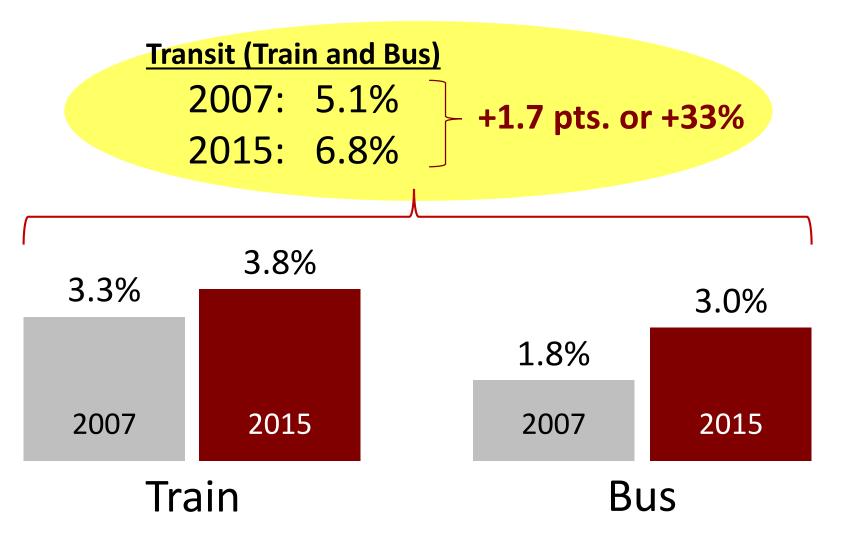
## Use of Transit by **Train**Has Increased



## Use of Transit by **Bus**Has Increased



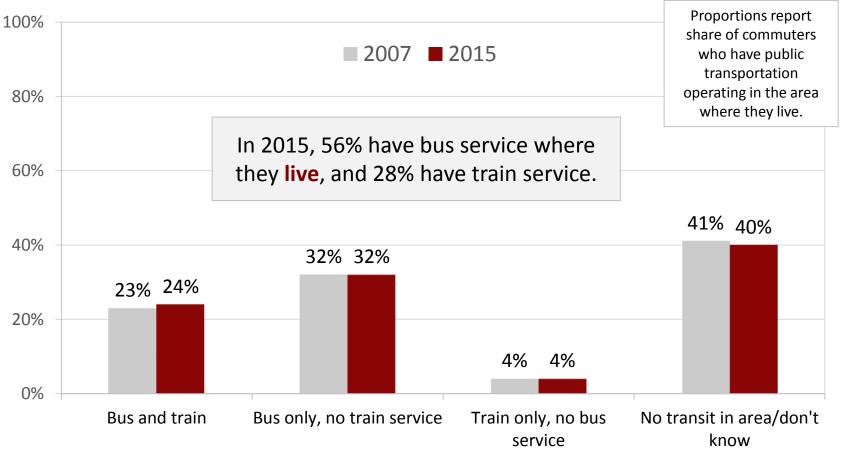
### Use of Transit Has Increased 33%



# And This Increase Has Come Without a (Perceived) Increase in Transit Service

\*Perceptions

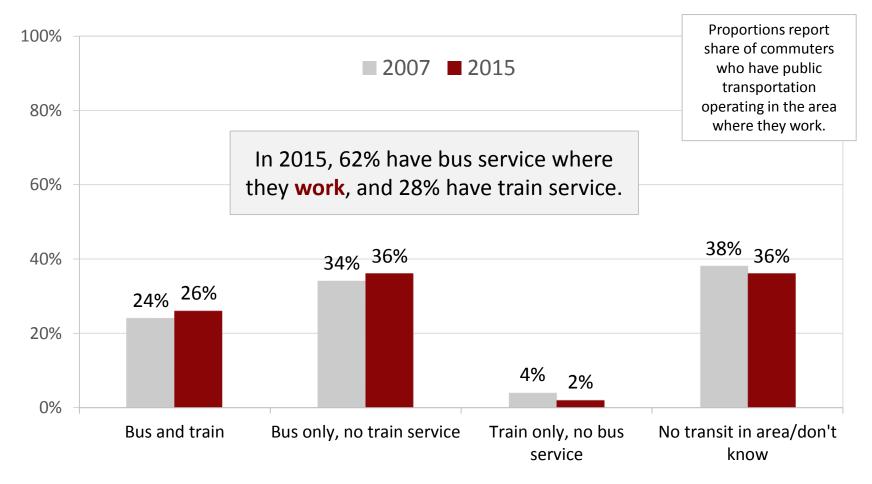
### In 2015, 60% Have Transit Service Available in the Area Where They Live, About the Same as in 2007



2007 n = 6,528 2015 n = 4.876

2007 Telephone Q44: Regardless of whether or not you use them, what train or bus companies provide service in the area where you live? 2015 Telephone Q44: Regardless of whether or not you use them, do any train or bus companies provide service in the area where you live? How about train? And bus?

### Slightly More than 60% Have Transit Service Available in the Area Where They **Work**, Just as in 2007



2007 n = 6,472 2015 n = 4,659

2007 Telephone Q44c: What train or bus companies provide service in the area where you <u>work</u>?
2015 Telephone Q44c: Do any train or bus companies provide service in the area where you <u>work</u>? How about train? And bus?

### Use of Telework Has Increased



### Use of **Telework** Has Increased



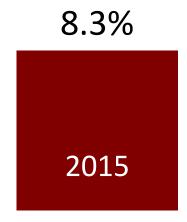
2007: 4.5%

2015: 8.3%

+84%

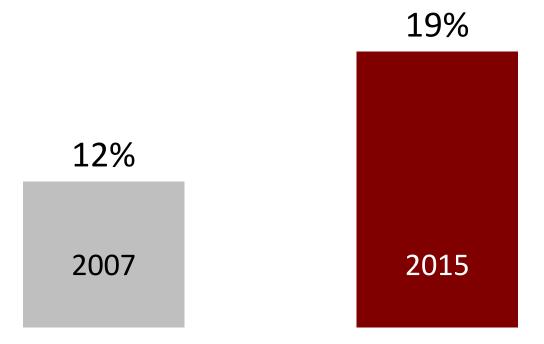
4.5%

2007



### Use of **Telework** Has Increased

Telework at Least Occasionally



2015 Telephone Q15: Now thinking about LAST week, how did you get to work each day ...?
2007 and 2015 Telephone Q13: Now I want to ask you about telecommuting, also called teleworking. For the purposes of this survey,
"telecommuters" are defined as "wage and salary employees who at least occasionally work at home or at a telework or satellite center <u>during</u> an entire work day, instead of traveling to their regular work place." Based on this definition, are you a telecommuter?

## 1 in 5 Virginia Workers Telework at Least Occasionally

### Telework at Least Occasionally

### Teleworkers

2007: 438,000

2015: 729,000

2007

n = 6,606

2015

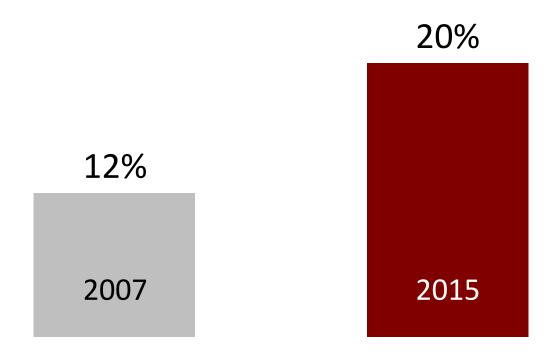
n = 4,825

Excludes employees who are selfemployed with only work location at home

2007 and 2015 Telephone Q13: Now I want to ask you about telecommuting, also called teleworking. For the purposes of this survey, "telecommuters" are defined as "wage and salary employees who at least occasionally work at home or at a telework or satellite center <u>during an entire work day</u>, instead of traveling to their regular work place." Based on this definition, are you a telecommuter?

# Why Has Telework/CWS Experienced Such a Dramatic Increase?

## The Share of Employers Who Offer Formal Teleworking Programs Has Increased



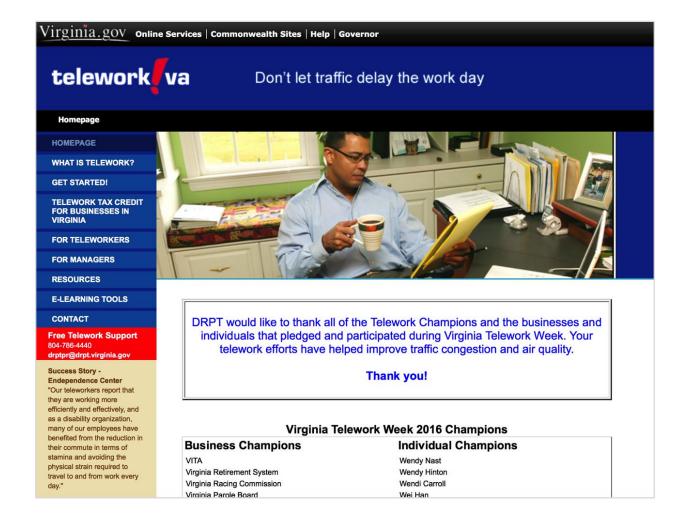
2007 n = 6,269

2015 n = 4,828

2007 Telephone Q14d: Does your employer have a formal telework program at your workplace or permit employees to telework under an informal arrangement with the supervisor?

2015 Telephone Q14d: Does your employer have a formal telework program at your workplace or permit employees to telework under an informal arrangement with the supervisor?

### DRPT's Telework!VA



Telephone Surveys 2007 and 2015

The proportion of commuters who "could and would" telework has decreased since 2007, but this is largely because actual telework counts have risen substantially.

2007

n = 6,586

2015

n = 4,825

Excludes employees
who are selfemployed with only
work location at
home

### There Is Potential for Another **600,000** Teleworkers in Virginia

<u>Telework Status</u>	<u>2007</u>	<u>2015</u>
Currently teleworking	12%	19%
Not teleworking	88%	81%
<ul> <li>Job responsibilities allow telework, and employee is INTERESTED in telework ("could and would")</li> </ul>	20%	16%
<ul> <li>Job responsibilities allow telework, but employee is NOT INTERESTED</li> </ul>	7%	13%
– Job responsibilities do NOT allow telework	61%	52%
<ul> <li>Job responsibilities allow telework, but employee is NOT INTERESTED</li> </ul>		

Represents potential of nearly **600,000** additional new teleworkers

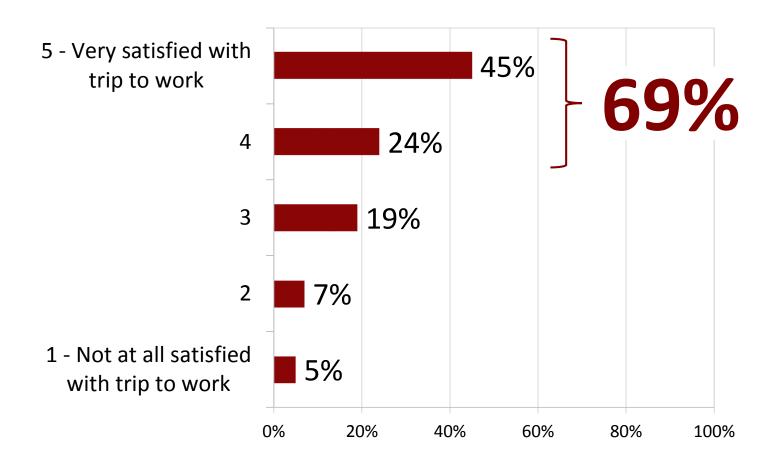
2007 and 2015 Telephone Q13: Telecommuters are defined as "wage and salary employees who at least occasionally work at home or at a telework or satellite center during an entire work day instead of travelling to their regular workplace." Based on this definition, are you a telecommuter?

With a Little Work,
We Could Realistically
Double the Number of
Virginia Teleworkers

## Satisfaction with Commute Has Increased Slightly

Telephone Survey 2015

### Almost Seven in Ten Commuters Are Satisfied with Their Commute Trip to Work



n = 4,649 Excludes "don't knows" Telephone Surveys 2007 and 2015

### Satisfaction with Work Commute Is About the Same Today as in 2007

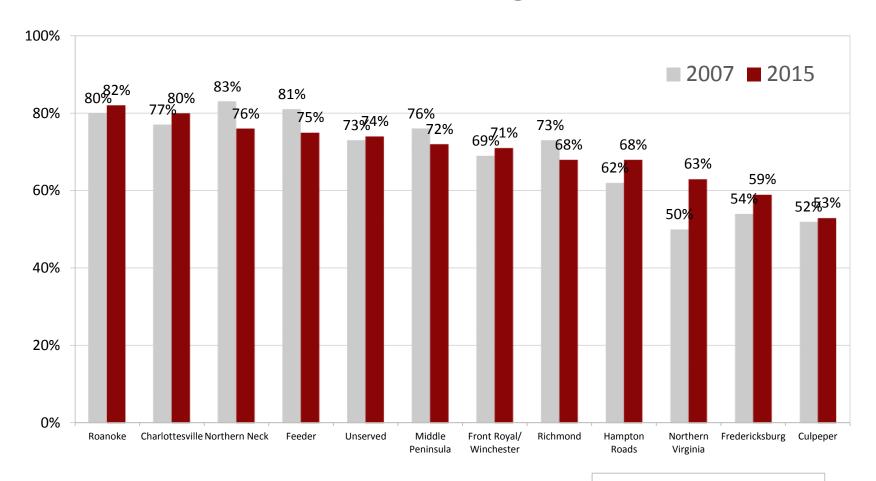


2007 n = 3,253

2015 n = 4,649

2007 Telephone Q56a: Overall, how satisfied are you with your trip to work? 2015 Telephone Q56f: Overall, how satisfied are you with your trip to work?

## Commute Satisfaction Has Increased in Just over Half of Virginia's Markets



Sample sizes not shown due to space limitations. 2007 Telephone Q56a: Overall, how satisfied are you with your trip to work? 2015 Telephone Q56f: Overall, how satisfied are you with your trip to work? Values shown are total proportion rating their satisfaction a "4" or "5" on a 5-point scale, where "5" means "very satisfied."

Which Regions Have Had the Greatest Increases in Satisfaction with Work Commutes?

### Northern Virginia, Hampton Roads, and Fredericksburg Are Leading the Way in Increased Commute Satisfaction

Northern Virginia +13 points 26%



Hampton Roads +6 points 10%



Fredericksburg +5 points



Telephone Survey 2015

Proportions are those who rated their satisfaction a "4" or "5" on a 1–5 scale, where "5" means "very satisfied."

Questions asked only of employed respondents.

1 to 10 minutes n = 729

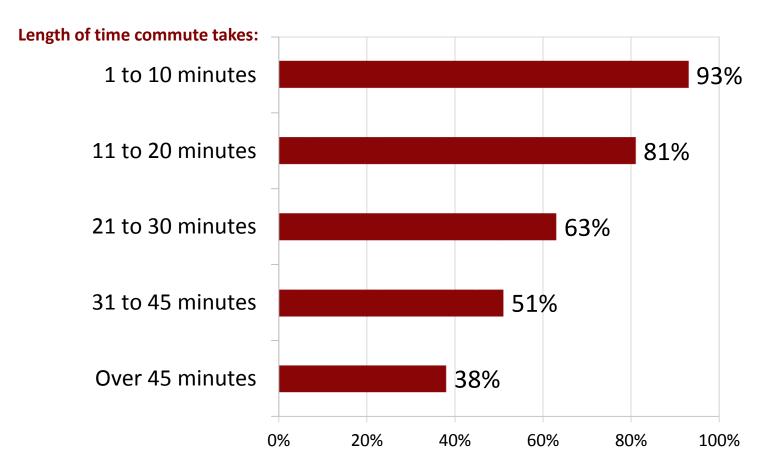
11 to 20 minutes n = 1,161

21 to 30 minutes n = 874

31 to 45 minutes n = 923

Over 45 minutes n = 850

### No Question, the Shorter the Commute, the More Satisfied Commuters Are with Their Trip to Work



Telephone Survey 2015

Proportions are those who rated their satisfaction a "4" or "5" on a 1–5 scale, where "5" means "very satisfied."

Bike/walk n = 98

Bus n = 183

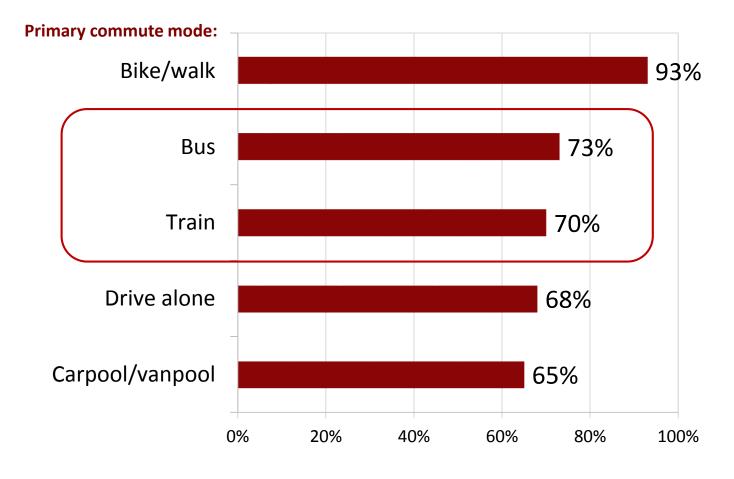
Train n = 362

Drive alone n = 3,563

Carpool/vanpool n = 312

Excludes "don't knows"

But Those Who Bike or Walk to Work, Followed by Those Who Take Transit (Bus and Train), Are Most Likely to Be Satisfied with Their Trip to Work



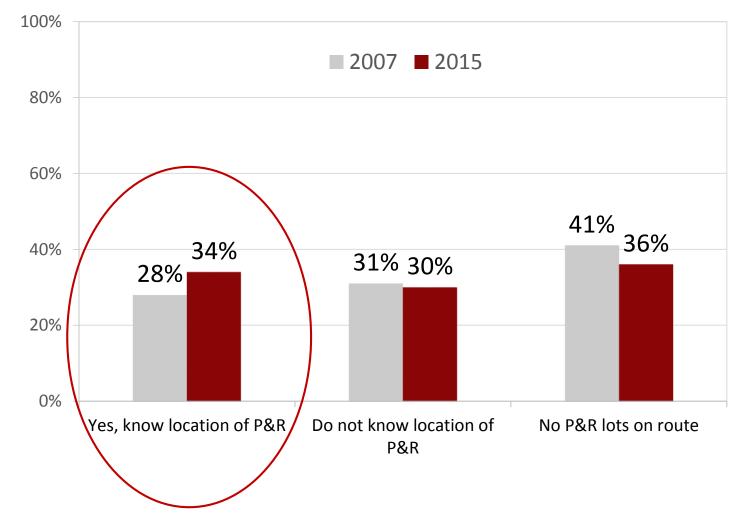
## 

## Awareness and Use of Rideshare Support Infrastructure Have Increased

## Park-and-Ride Lots

Telephone Surveys 2007 and 2015

## Awareness of the Location of Park-and-Ride Lots Has Increased, from 28% in 2007 to 34% in 2015



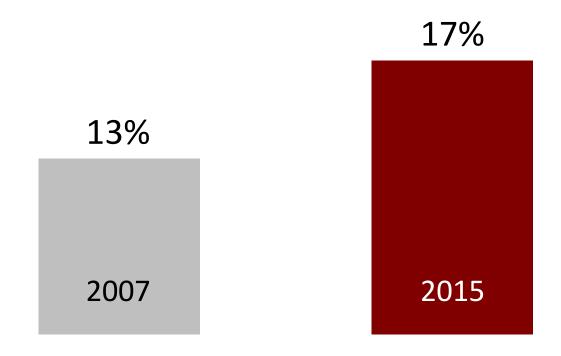
2007 and 2015 Telephone Q52: Do you know the locations of park-and-ride lots along the route that you take to work?

2007 n = 6,467

2015 n = 4,659

### Use of Park-and-Ride Lots Has Increased

Among 34% Aware of Park-and-Ride Lots



Use of Park-and-Ride

## Guaranteed Ride Home

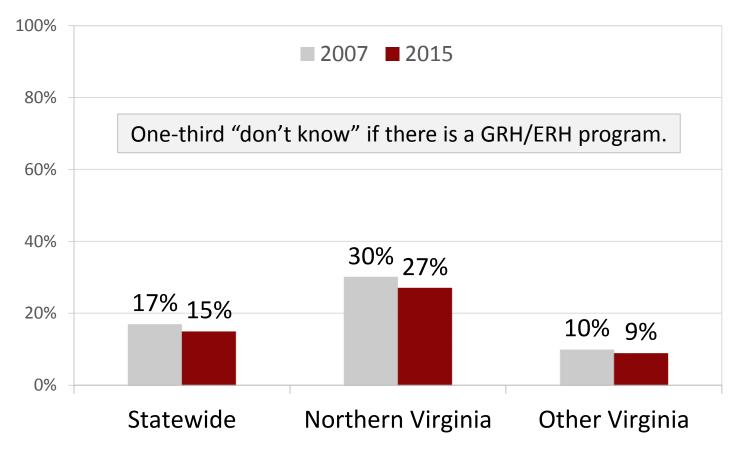
Telephone Surveys 2007 and 2015

Note: This question measures awareness of GRH/ERH rather than actual availability of program.

Statewide: 2007 n = 5,914 2015 n = 4,370

Northern Virginia 2007 n = 2,739 2015 n = 2,843

Other Virginia 2007 n = 3,175 2015 n = 1,527 Awareness of Guaranteed Ride Home and Emergency Ride Home Programs Is About the Same Today as in 2007; Just as in 2007, Awareness Is Higher in Northern Virginia

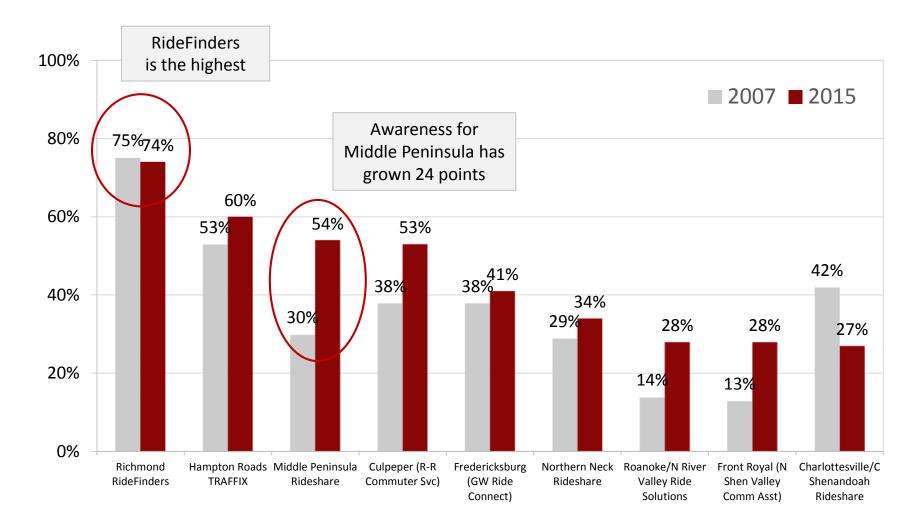


2007 Telephone Q102: Do you know if there is a regional GRH, or guaranteed ride home/emergency ride home, program available in the event of unexpected emergencies and unscheduled overtime for commuters who rideshare or use public transportation?

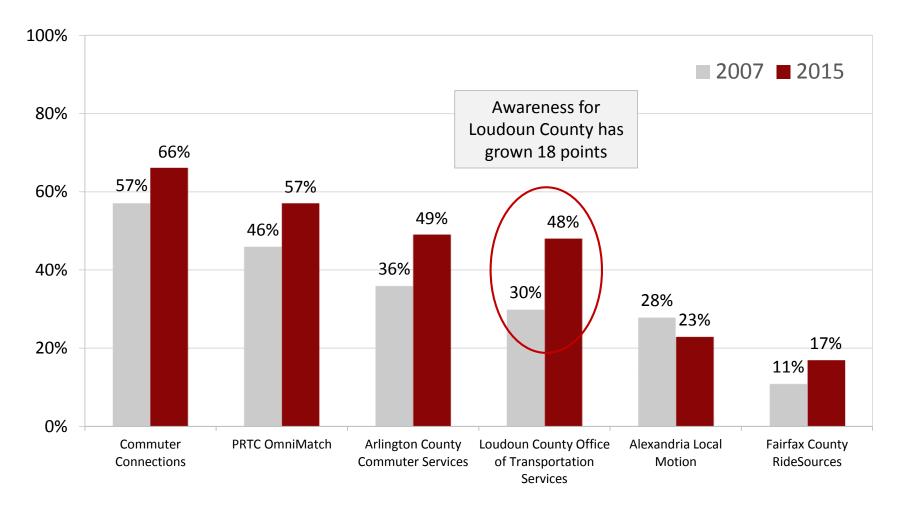
2015 Telephone Q102: Do you know if there is a regional guaranteed ride home or emergency ride home program available in the event of unexpected emergencies and unscheduled overtime for commuters who rideshare or use public transportation? You might know of the program as GRH or ERH.

## Local Commute Programs and Services

#### Awareness of Commuter Assistance Programs



#### Awareness of Commuter Assistance Programs

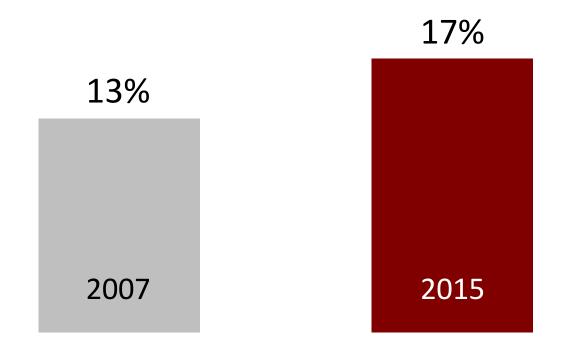


Sample sizes not shown due to space limitations.

2007 and 2015 Telephone Q86: Have you ever heard of an organization in the Washington region called Commuter Connections? 2007 and 2015 Telephone Q88d: Have you ever heard of an organization or service called [SERVICE OR PROGRAM]?

#### Use of Commuter Services Has Increased

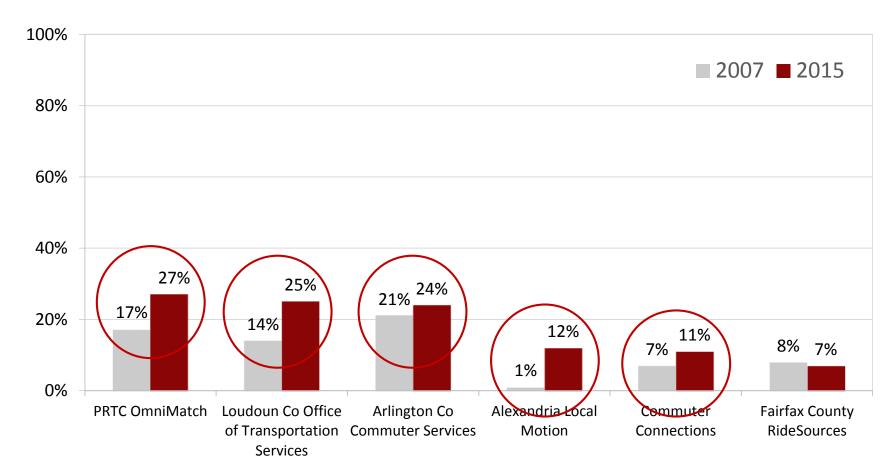
**Among Those Aware of Commuter Services** 



Use of **Commuter Services** 

#### **Use of Commuter Services**

#### **Inside** Northern Virginia

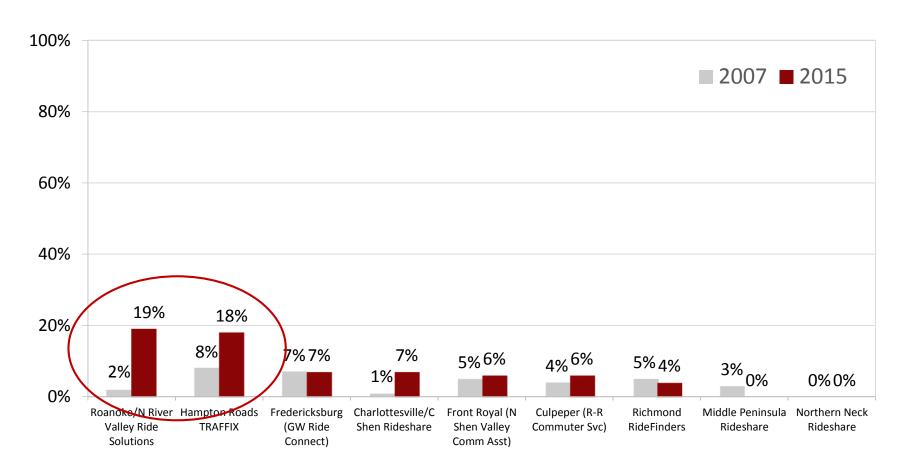


Sample sizes not shown due to space limitations.

2007 and 2015 Telephone Q88a: Have you contacted Commuter Connections in the past year or visited a website sponsored by this organization?

2007 Telephone Q88e: Have you contacted [SERVICE OR PROGRAM] in the past year or visited a website sponsored by this organization? 2015 Telephone Q88e: Have you contacted [SERVICE OR PROGRAM] in the past year or visited its website?

### Use of Commuter Services Outside Northern Virginia



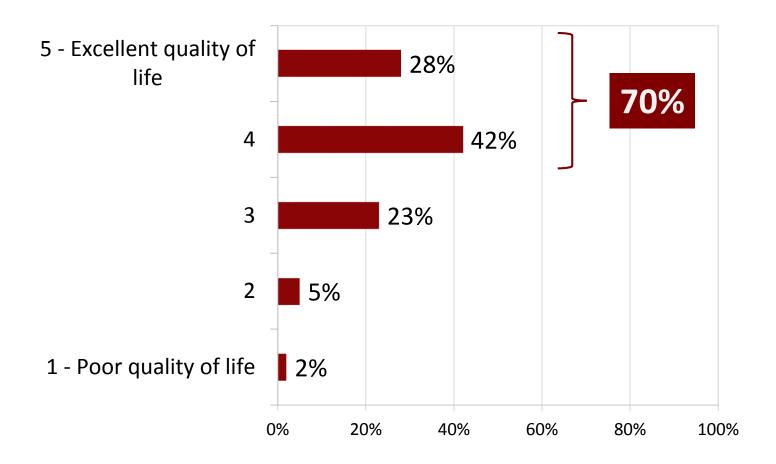
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# Satisfaction with Work Commute and Virginia's Transportation System Drives Quality of Life Ratings

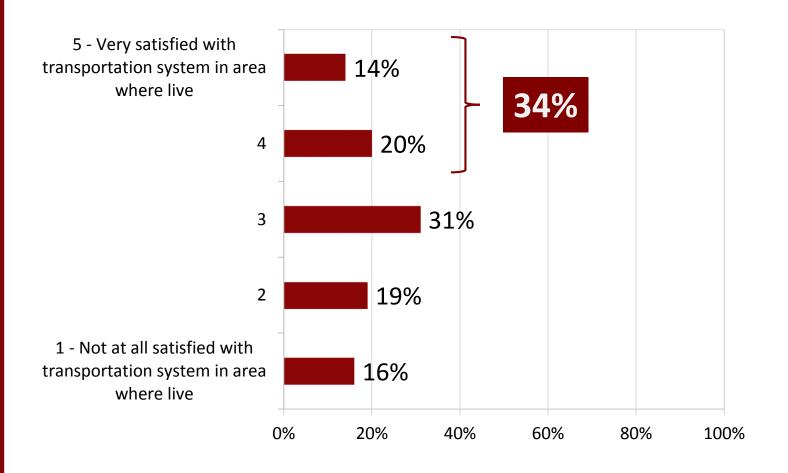
Question asked only in internet survey.

### More than Two-Thirds Rate the Quality of Life in the Area Where They Live as Favorable



n = 4,588 Excludes "don't knows"

### One-Third Are Satisfied with the Transportation System in the Area Where They Live



n = 4,402 Excludes "don't knows" Telephone Survey 2015

Proportions are those who rated their satisfaction with transportation system in the area where they live a "4" or "5" on a 1–5 scale, where "5" means "very satisfied."

Not satisfied with trip to work n = 1,510

Satisfied with trip to work n = 2,814

# Commuters Who Are Satisfied with Their Trip to Work Are More Likely to Be Satisfied with the Transportation System



2015 Telephone Q56e: How satisfied are you with the transportation system in the [HOME] region? 2015 Telephone Q56f: Overall, how satisfied are you with your trip to work?

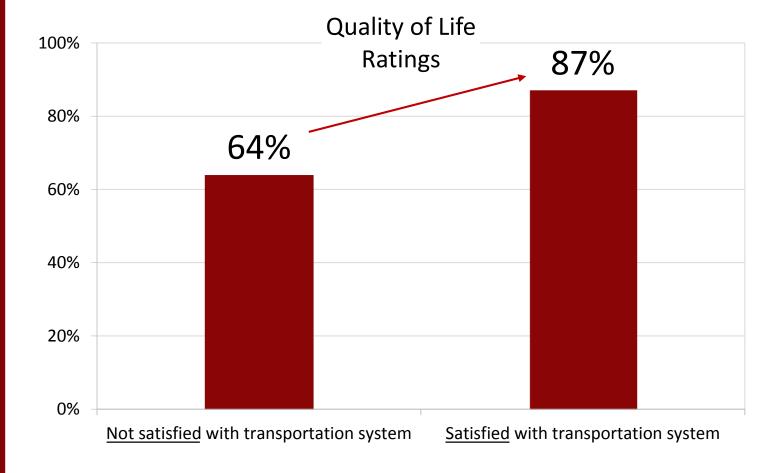
Telephone Survey 2015

Proportions are those who rated the quality of life in the area where they live a "4" or "5" on a 1–5 scale, where "5" means "excellent."

Not satisfied with transportation system n = 1,069

Satisfied with transportation system n = 3,185

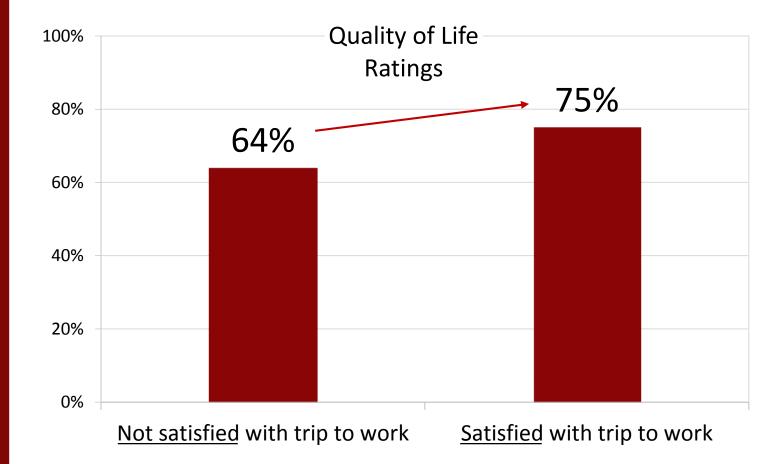
### Those Satisfied with the Transportation System Are More Likely to Rate **Quality of Life** Favorably



2015 Telephone Q56d1: Overall, how would you rate the quality of life in the area where you live? 2015 Telephone Q56e: How satisfied are you with the transportation system in the [HOME] region?

Proportions are those who rated the quality of life in the area where they live a "4" or "5" on a 1–5 scale, where "5" means "excellent."

Commuters Who Are Satisfied with Their **Trip to Work** Are More Likely to Hold a Favorable View of
the **Quality of Life** in the Area Where They Live



Not satisfied with trip to work n = 1,512

Satisfied with trip to work n = 1,217

2015 Internet Q56d1: Overall, how would you rate the quality of life in the area where you live? 2015 Internet Q56f: Overall, how satisfied are you with your trip to work?

Clearly, transportation is related to quality of life. But what is the nature of that relationship?

Can the quality of the transportation system actually improve quality of life?

### **Regression Analysis**

Regression analysis allows us to assess or examine the relationship between satisfaction with transportation and perception of the quality of life.

Note: The regression analysis is based on data from the internet survey.

# The Key Perceived Quality of Life Drivers for Virginia Residents

**Education system** 

Accessible healthcare

Job opportunities

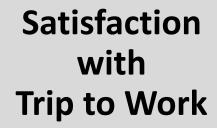
Recreational and entertainment opportunities

Maintaining and improving transportation

### Regression Analysis Indicates a Statistically Significant Relationship Between Satisfaction with Transportation and Perception of Quality of Life

**Finding:** Those who are satisfied with the transportation system in their area are significantly more likely to view the quality of life favorably. Satisfaction with .360 Quality **Transportation** of Life **System** .360 is the standardized **Key takeaway:** Satisfaction coefficient and indicates the with the transportation strength of the system drives perception impact. of quality of life.

Regression Analysis Indicates That Satisfaction with Trip to Work Is a Statistically Significant Driver of Satisfaction with the Transportation System, Which Drives Quality of Life



.378

Satisfaction with Transportation System

.341

Quality of Life

.378 and .341 are the standardized coefficients and indicate the strength of the impact. **Key takeaway:** To improve quality of life, increase satisfaction with the transportation system. To improve satisfaction with the transportation system, increase satisfaction with work commute among commuters.

### Guess Who's More Satisfied with Their Work Commute and the Transportation System?

2015 Internet Survey.

Telephone Survey 2015

Proportions are those who rated their satisfaction a "4" or "5" on a 1–5 scale, where "5" means "very satisfied."

Bike/walk n = 98

Bus

n = 183

Train n = 362

Drive alone

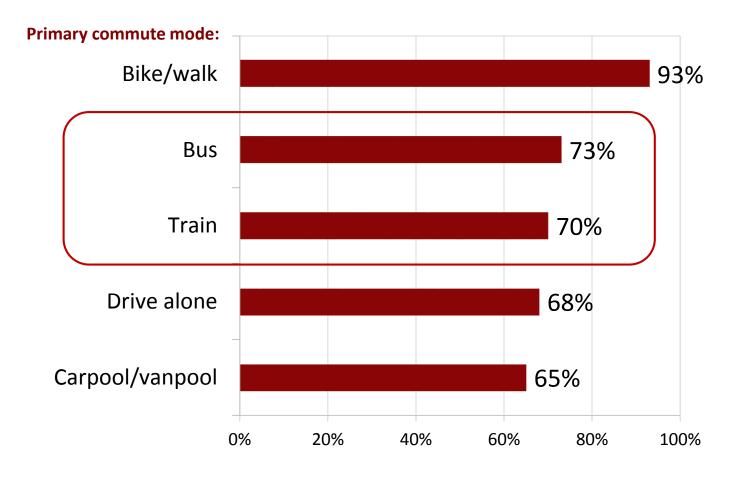
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n = 312

Excludes "don't knows"

### Those Who Bike or Walk or Commute by Bus or Train Are More Likely to Be Satisfied with Their Trip to Work



Telephone Survey 2015

Proportions are those who rated their satisfaction a "4" or "5" on a 1–5 scale, where "5" means "very satisfied."

> Bus n = 183

Train

n = 358

Bike/walk n = 93

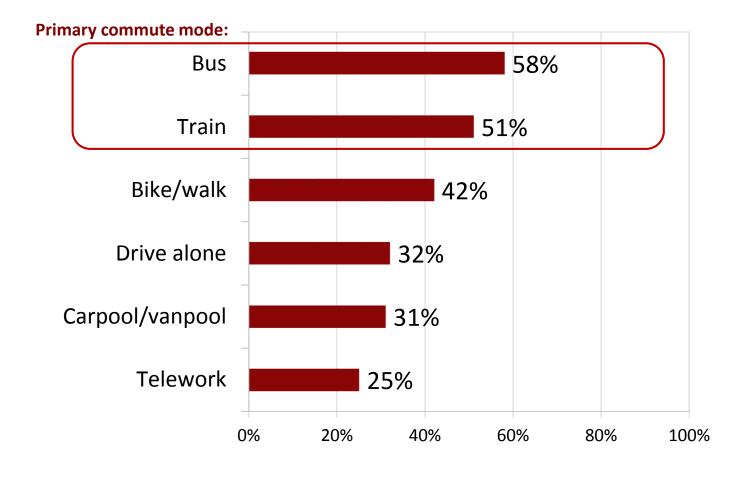
Drive alone n = 3,278

Carpool/vanpool n = 290

> Telework n = 134

Excludes "don't knows"

# Those Who Commute by Bus or Train Are More Likely to Be Satisfied with the Transportation System



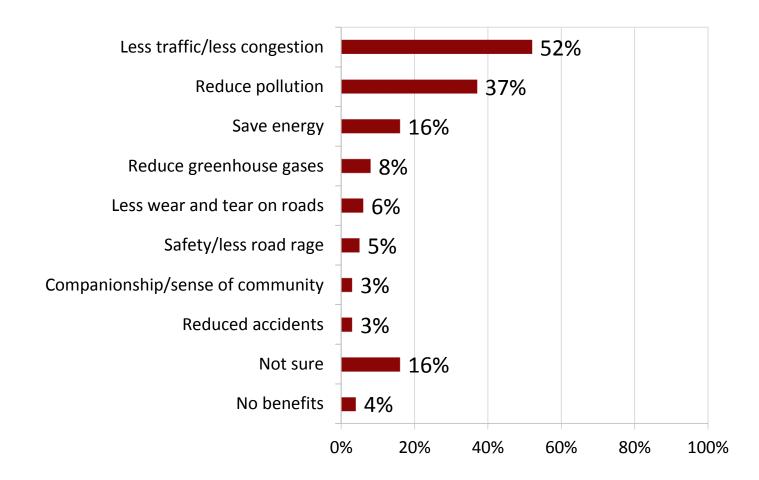
The Vast Majority of Virginians
See the Value of Investing in
Virginia's Transportation
System, Including Alternative
Transportation Options

### **Societal Benefits of Ridesharing**

"Consider the benefits of traveling by carpool, vanpool, bus, or train. What impact or benefit does a community or region receive when people use these types of transportation?"

Telephone Survey 2015

### 80% of Commuters Recognize the **Societal Benefits** of Ridesharing



n = 4,659

Proportions will total to more than 100% because respondents were allowed to give more than one answer.

"How important is the availability of alternative transportation options to Virginia's economy?"

# 82% Say It's Important

Question asked only in internet survey.

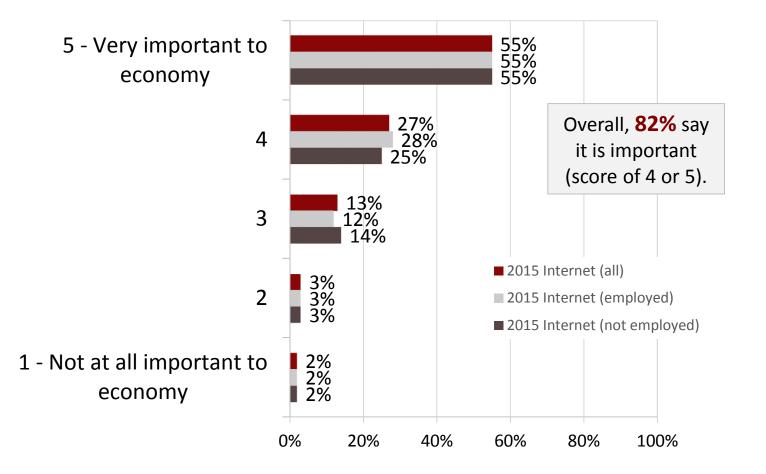
Overall n = 4,560

Employed n = 2,938

Not employed n = 1,622

Excludes "don't knows"

# Virginians Believe the Availability of Alternative Transportation Options Is Important to Virginia's Economy

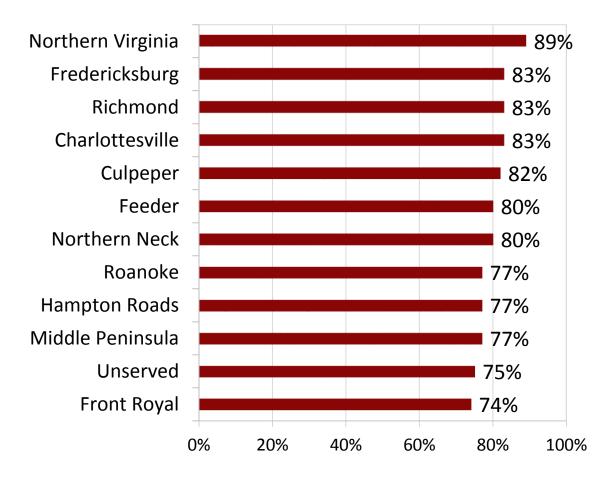


Values shown are total proportion rating importance a "4" or "5" on a 5-point scale, where "5" means "very important."

```
Northern Virginia
   n = 1,283
 Fredericksburg
    n = 418
   Culpeper
    n = 247
   Richmond
    n = 530
 Charlottesville
    n = 255
     Feeder
    n = 123
 Northern Neck
    n = 228
    Roanoke
    n = 263
Hampton Roads
    n = 563
Middle Peninsula
    n = 220
   Unserved
    n = 115
  Front Royal
```

n = 265

### Residents Across Virginia Believe Alternative Transportation Options Are Important to Virginia's Economy



"How important is the availability of alternative transportation options for Virginia's workers to get to and from work?"

2015 Internet Q60d.

# 85% Say It's Important

Question asked only in internet survey.

Overall n = 4,583

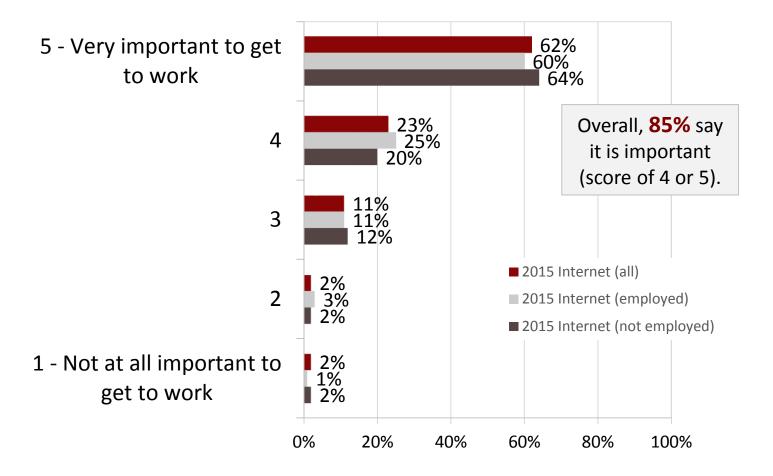
Employed n = 2.952

Not employed n = 1,631

Excludes "don't knows"

# Nearly 9 in 10 Virginians Say the Availability of Transportation Options for Workers to Get to and from Work Is Important

Results Are Comparable for Employed and Not-Employed Residents

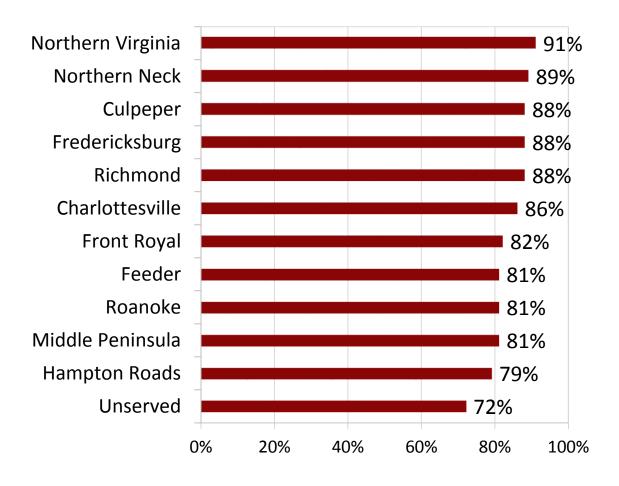


2015 Internet Q60d: How important is the availability of alternative transportation options for Virginia's workers to get to and from work?

Values shown are total proportion rating importance a "4" or "5" on a 5-point scale, where "5" means "very important."

#### Northern Virginia n = 1,284Culpeper n = 252Fredericksburg n = 416Richmond n = 583**Northern Neck** n = 230Charlottesville n = 254Front Royal n = 271Feeder n = 125Roanoke n = 263Middle Peninsula n = 219**Hampton Roads** n = 566Unserved n = 120

# Residents Across Virginia Believe the Availability of Transportation Options for Virginia's Workers to Get to and from Work Is Important



"How important is it for Virginia to invest in alternative transportation options to provide workers with affordable travel for their work commutes?"

2015 Internet Q60e. 100

# 83% Say It's Important

2015 Internet Survey.

Question asked only in internet survey.

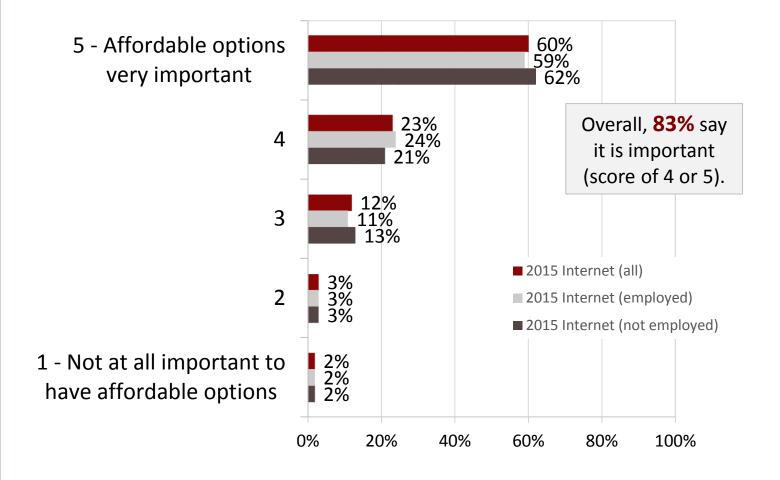
Overall n = 4,583

Employed n = 2.952

Not employed n = 1,631

Excludes "don't knows"

# Virginians Also Say It Is Important to Invest in Alternative Transportation to Provide Workers with Affordable Travel for the Work Commute



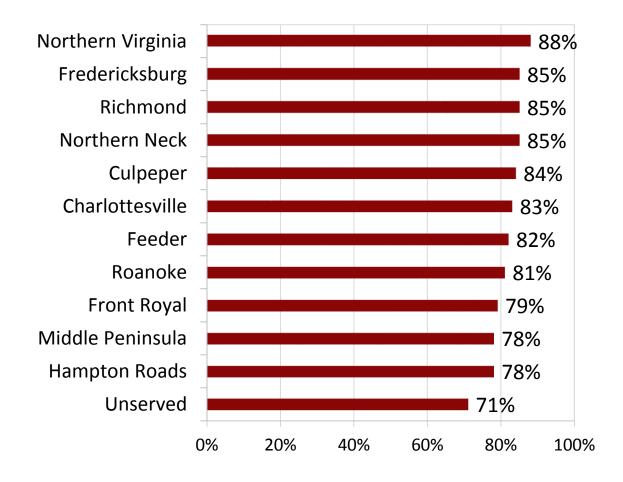
2015 Internet Q60e: How important is it for Virginia to invest in alternative transportation options to provide workers with affordable travel for their work commutes?

Values shown are total proportion rating importance a "4" or "5" on a 5-point scale, where "5" means "very important."

#### Northern Virginia n = 1,283Fredericksburg n = 419Richmond n = 581Northern Neck n = 232Culpeper n = 251Charlottesville n = 255Feeder n = 125Roanoke n = 261Front Royal n = 273Middle Peninsula n = 219**Hampton Roads** n = 566Unserved

n = 120

## Residents Across Virginia Believe It Is Important to Provide Affordable Transportation Options for Work Commutes



2015 Internet Q60e: How important is it for Virginia to invest in alternative transportation to provide workers with affordable travel options for their work commutes?

"In your opinion, how important is it that Virginia invest in its transportation system to maintain and grow Virginia's economy?"

2015 Internet Q60b. 104

# 86% Say It's Important

Question asked only in internet survey.

Overall n = 4,613

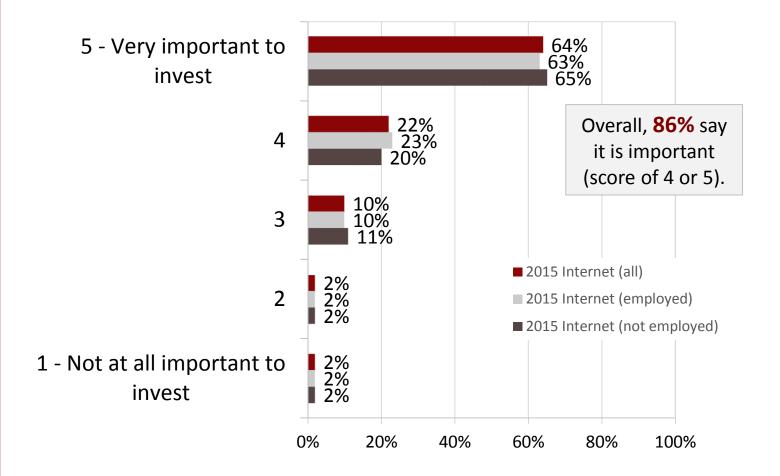
Employed n = 2.966

Not employed n = 1,647

Excludes "don't knows"

#### Vast Majority of Virginians Believe It Is Important That Virginia Invest in Its Transportation System to Maintain and Grow Virginia's Economy

Results Are Comparable for Employed and Not-Employed Residents



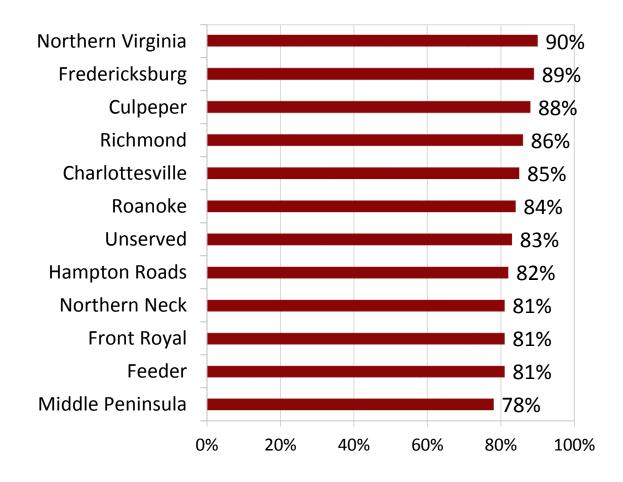
2015 Internet Q60b: In your opinion, how important is it that Virginia invest in its transportation system to maintain and grow Virginia's economy?

Values shown are total proportion rating importance a "4" or "5" on a 5-point scale, where "5" means "very important."

Northern Virginia n = 1,296Fredericksburg n = 422Culpeper n = 250Richmond n = 584Charlottesville n = 258Roanoke n = 263Unserved n = 126**Hampton Roads** n = 563**Northern Neck** n = 236Front Royal n = 273Feeder n = 126Middle Peninsula

n = 221

### Residents Across Virginia Believe It Is Important That Virginia Invest in Its Transportation System to Maintain and Grow Virginia's Economy



2015 Internet Q60b: In your opinion, how important is it that Virginia invest in its transportation system to maintain and grow Virginia's economy?

# These Are Shared Beliefs!

#### Across Age Groups

	Under 25	25–34	35–44	45–54	55–64	65 and older
Important to invest in transportation system to maintain and grow Virginia's economy	80%	82%	84%	88%	89%	89%
Importance of alternative transportation options to Virginia's economy	82%	80%	84%	83%	88%	81%
Importance of alternative transportation options to get workers to and from work	83%	84%	87%	86%	88%	87%
Important to invest in alternative transportation to provide affordable travel options for work commuters	88%	83%	85%	85%	85%	85%

#### **Across Generations**

	Millennials	Gen X	Boomers	Silent/ Greatest
Important to invest in transportation system to maintain and grow Virginia's economy	81%	85%	89%	91%
Importance of alternative transportation options to Virginia's economy	80%	84%	84%	83%
Importance of alternative transportation options to get workers to and from work	85%	86%	87%	89%
Important to invest in alternative transportation to provide affordable travel options for work commuters	83%	85%	84%	87%

### As Expected, Across Alt. Mode Users

	Train	Carpool/ Vanpool	Bus	Walk/Bike
Important to invest in transportation system to maintain and grow Virginia's economy	95%	88%	88%	91%
Importance of alternative transportation options to Virginia's economy	91%	86%	88%	93%
Importance of alternative transportation options to get workers to and from work	89%	89%	86%	94%
Important to invest in alternative transportation to provide affordable travel options for work commuters	91%	87%	84%	93%

# But What About Drive-Alone Commuters and Teleworkers?

## Yes, Drive-Alone Commuters and Telework Users, Too

	Drive alone	Telework	Train	Carpool/ Vanpool	Bus	Walk/Bike
Important to invest in transportation system to maintain and grow Virginia's economy	85%	90%	95%	88%	88%	91%
Importance of alternative transportation options to Virginia's economy	81%	85%	91%	86%	88%	93%
Importance of alternative transportation options to get workers to and from work	84%	90%	89%	89%	86%	94%
Important to invest in alternative transportation to provide affordable travel options for work commuters	82%	88%	91%	87%	84%	93%

## If You Build It, They Will Come!

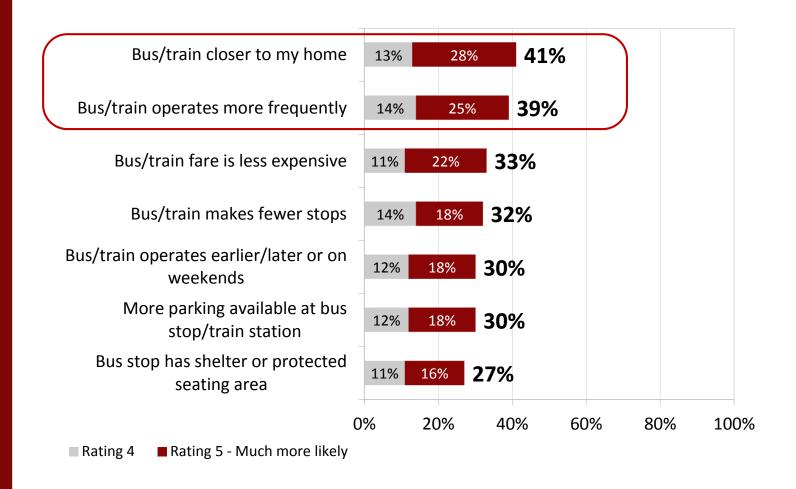
"How much more likely would you be to use public transit or to use it more often if each of the following public transit improvements were made in the area where you live?"

Internet Survey 2015

Question asked only in internet survey.

#### There Is Pent-Up Demand for More Transit Service

Percentage of Respondents Who Say They Are More Likely to Use Public Transit or Use It More Often





We Now Have **Empirical Evidence That We Can Share** with Our Stakeholders and Leaders

#### 5 Key Messages

1

Virginia is becoming more multimodal, and transit is part of this success story.

Higher satisfaction ratings with work commute directly correlate to higher satisfaction ratings with Virginia's transportation system. Higher ratings of Virginia's transportation system drive higher quality of life ratings.

Those who commute to work by bus/train (versus other modes) are more satisfied with their work commutes and Virginia's transportation system.

We need to get more people on board. This comes with little risk, as more people would ride the bus if more convenient transit services were available.

Investment in Virginia's transportation system would be widely supported. The vast majority of Virginians, including "drive-alone commuters," feel it is important that Virginia invest in its transportation system to maintain and grow Virginia's economy. This includes alternative transportation options.

## Invest in Transit Now



### Get a Copy of This Deck and Share It with Your Leadership Team

## Look for a Regional Version of This Report Headed Your Way

#### Plan to Share Your Regional Report with Your Local Elected Leaders

#### Thank You!

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