

Community Survey, 2019 Triangle Region

Objective of the Survey

- Obtain a benchmark overview of
 - Public awareness of transit service
 - Public awareness of planned improvements
 - Public perceptions of the importance of transit improvements

Introduction

- Sample:

- The sample on which this report is based is a random sample of 1,202 adults in the three county area.
- The sample is stratified by county. This means that it includes three separate samples, 500 responses from Wake County, 400 from Durham County, and 302 from Orange County.
- The results are weighted to reflect the different adult (eighteen and older) populations of the three counties for county, age, and sex.

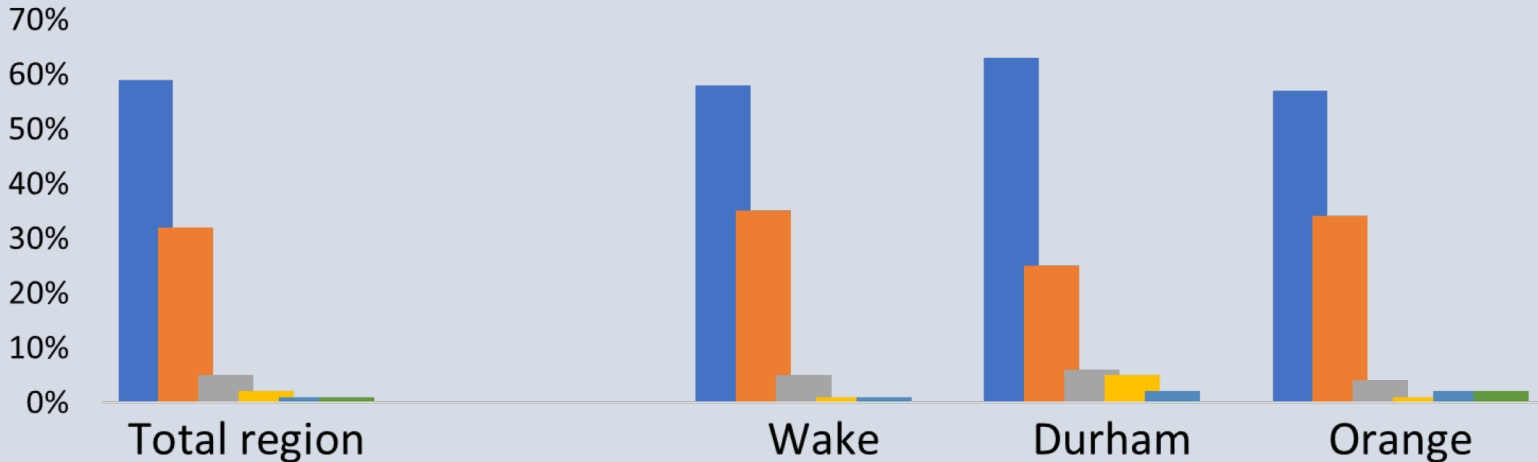
Six Topics Today

1. Current transit use
2. Awareness of transit services
3. Public Transportation Market Profile
4. Awareness of transit improvement plans
5. Perceptions of Public Transit and of Benefits of Improvement
6. Attitudes Toward Tax Funding of Public Transportation Improvements

1. Current Transit Use

Usual Purpose of Most Frequent Local Trip

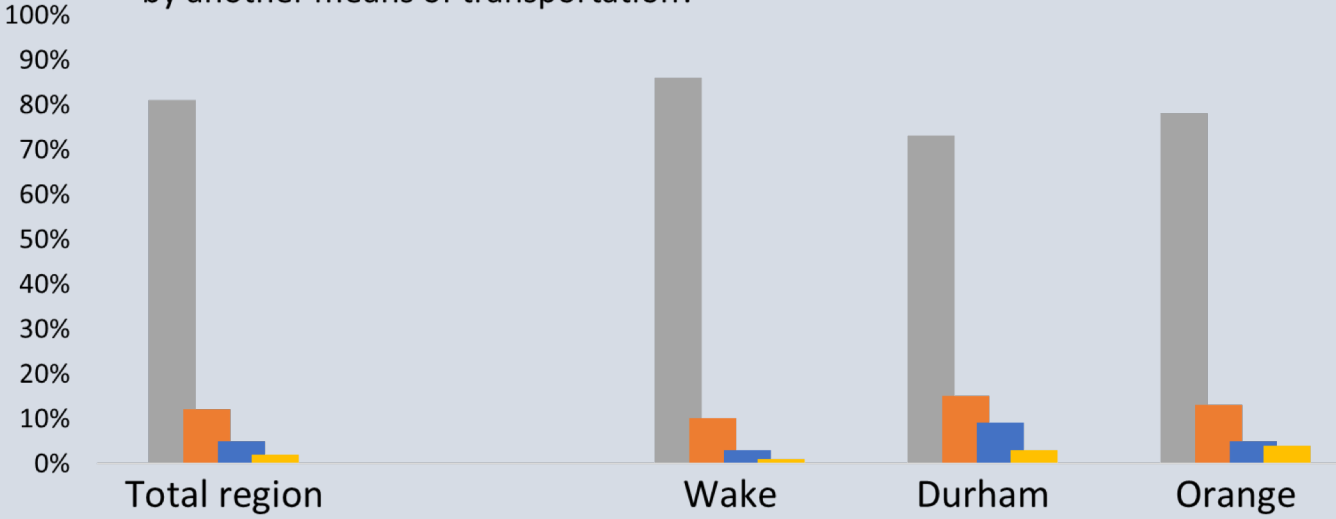
Q3. I'd like you to think for a moment about the local trip you make most often during a typical week. Is that to go to work, go to school, do errands or other purposes?



■ Work	59%	58%	63%	57%
■ Errands, Shopping	32%	35%	25%	34%
■ School	5%	5%	6%	4%
■ Recreation, social	2%	1%	5%	1%
■ Medical	1%	1%	2%	2%
■ Kids to school	1%	0%	0%	2%

Current Mode Used for Most Frequent Local Trip

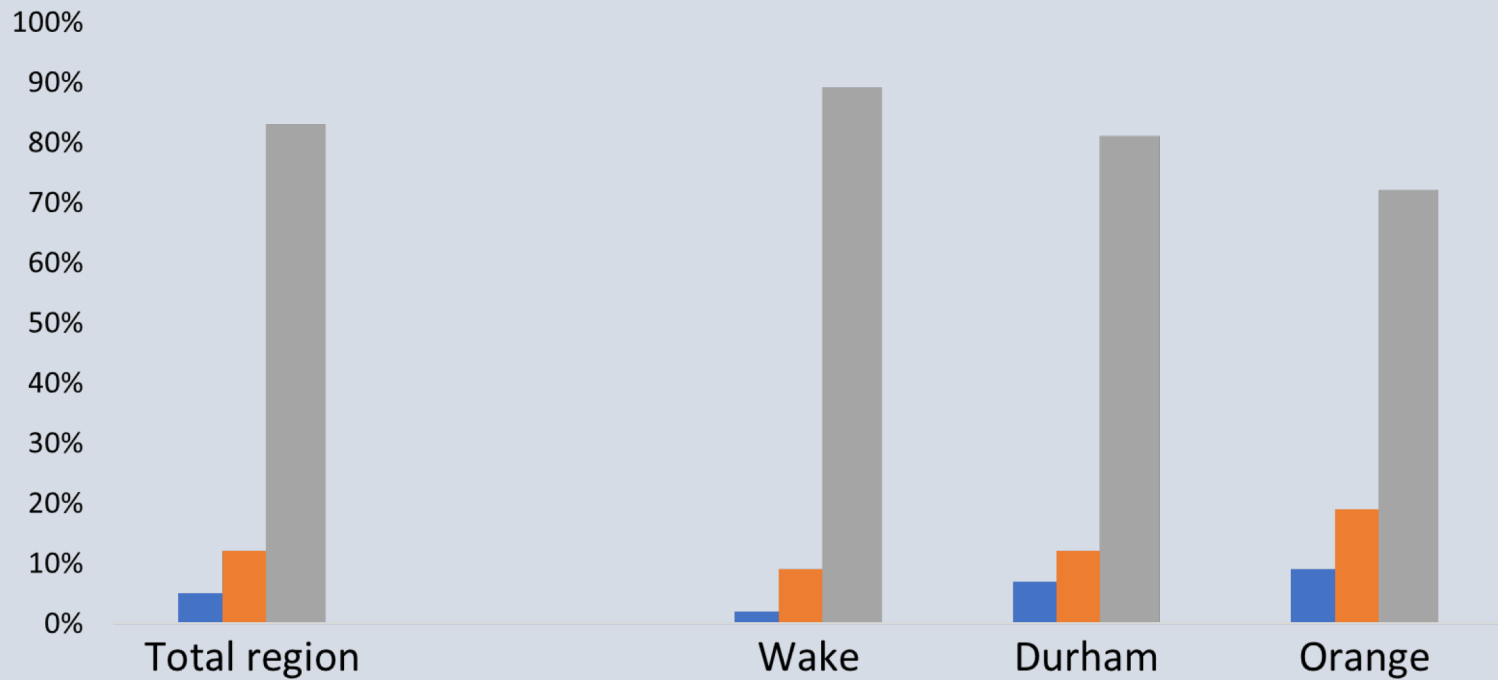
Q4 How have you most often made that trip in the past twelve months? By driving by yourself all the way, by driving with other adults, by using public transit all or part of the way, walking all the way, or by another means of transportation?



■ Driving alone all the way	81%	86%	73%	78%
■ Driving with other adults or carpooling	12%	10%	15%	13%
■ Bus	5%	3%	9%	5%
■ Other (walk, bike, drive also taking child)	2%	1%	3%	4%

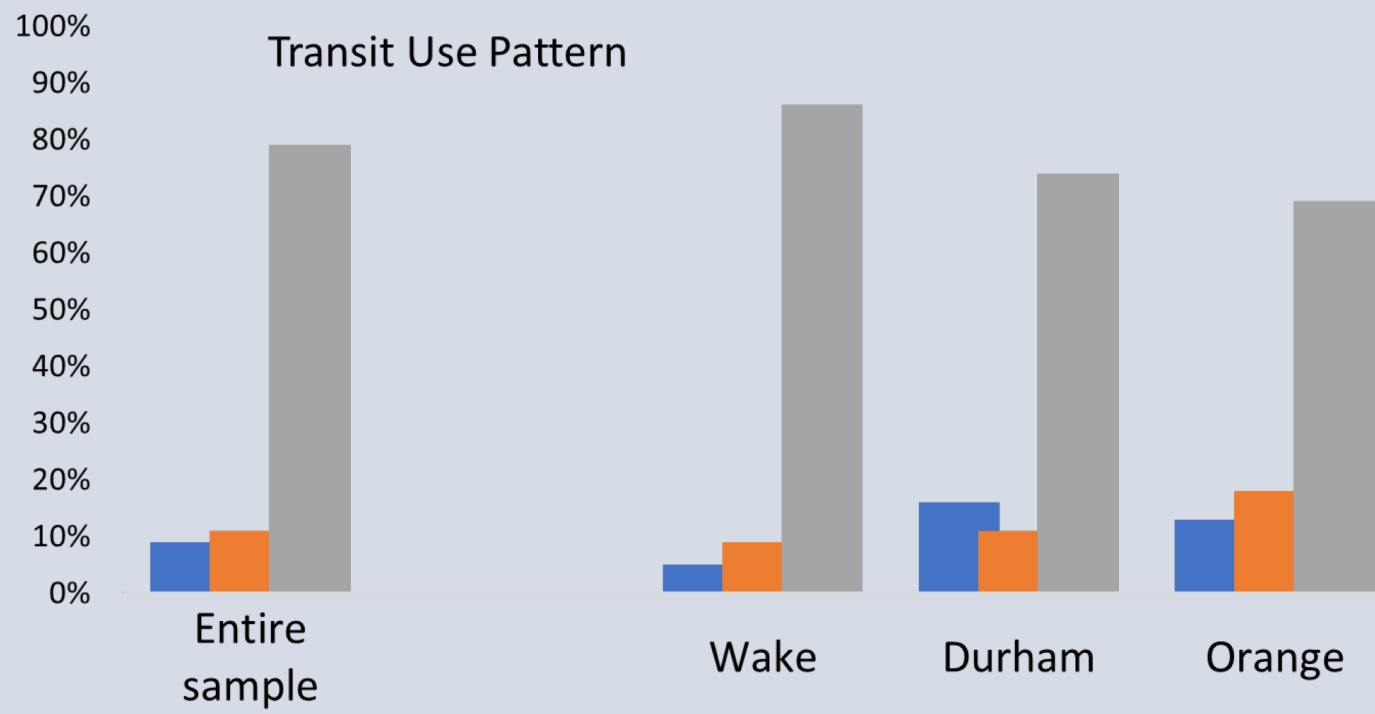
Use of Public Transportation by Those (95%) Who Do Not Use Public Transportation for Their Most Frequent Trip

Q5 In the past year have you used the buses of one of the several transit systems in the Triangle region, once a month or more, just a few times or never?
 (Includes only those who do *not* use transit for most local trips)



■ Once a month or more
 ■ Just a few times
 ■ Never

Overall level of Transit Use



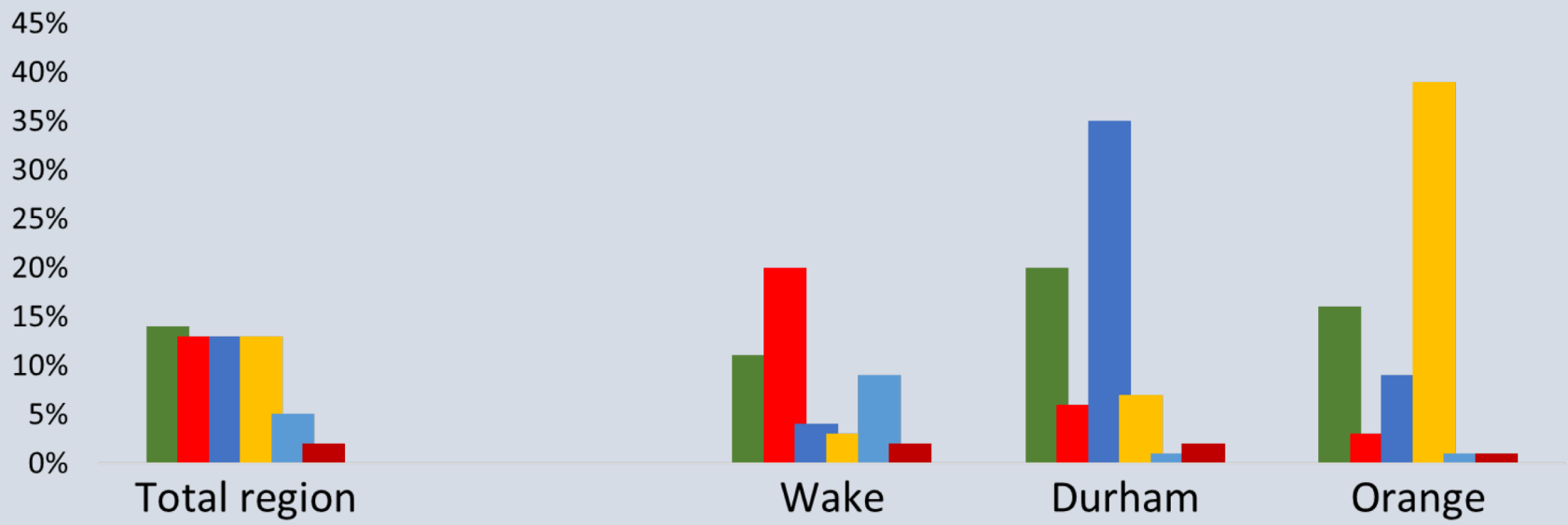
	Entire sample	Wake	Durham	Orange
Regular rider (most frequent trip or once month or more)	9%	5%	16%	13%
Occasional Rider	11%	9%	11%	18%
Non transit user	79%	86%	74%	69%

2. Awareness of Local Transit Systems

Awareness: Unaided Recall of the Names of Local Transit Systems

[Current customers plus others who are aware of the systems]

Uses the named transit system or does not use transit but is aware of the system indicated (unaided response)

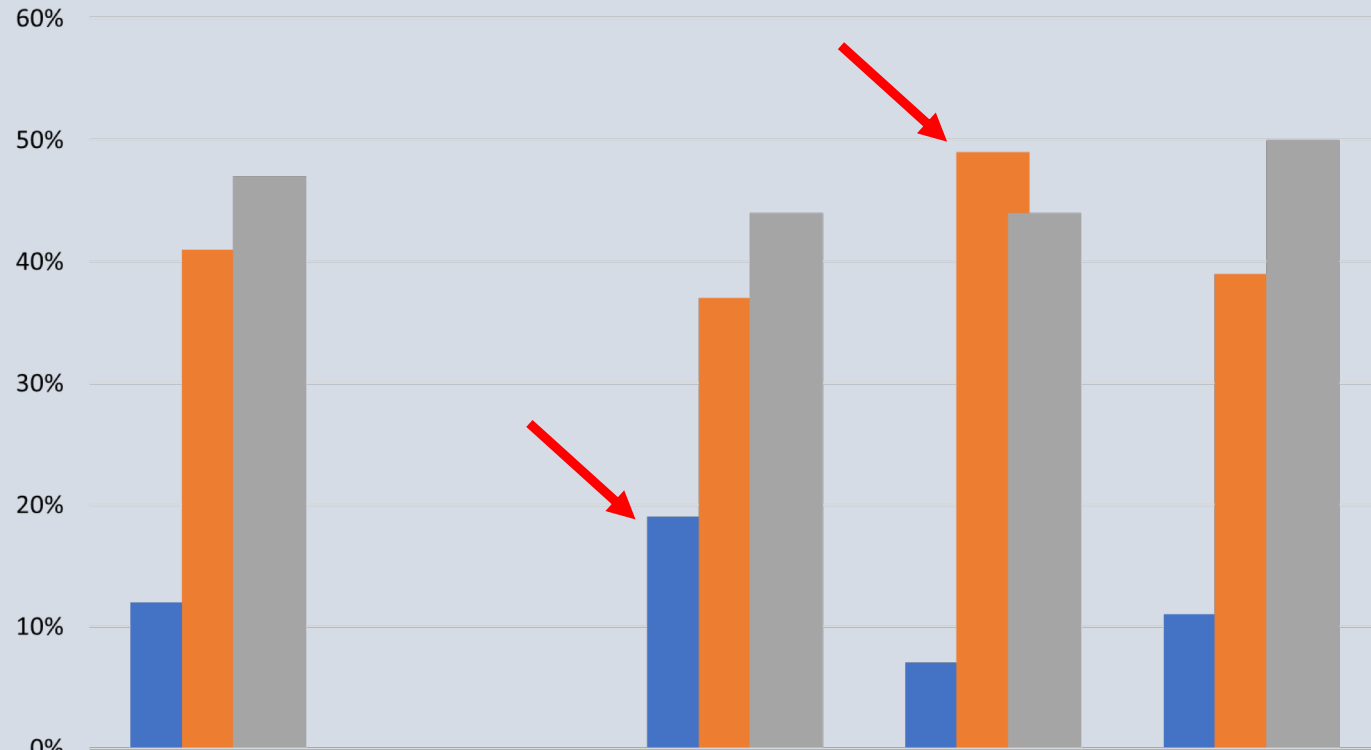


	Total region	Wake	Durham	Orange
GoTriangle	14%	11%	20%	16%
GoRaleigh	13%	20%	6%	3%
GoDurham	13%	4%	35%	9%
Chapel Hill	13%	3%	7%	39%
GoCary	5%	9%	1%	1%
Wolfline	2%	2%	2%	1%

Awareness: Knowing about Bus Stops

[Non-transit users only]

Awareness of Bus Stop or Park & Ride



Knows park & ride

12%

Knows of stop in walking distance

41%

Not sure about stop or P&R

47%

Wake

19%

Durham

7%

Orange

11%

37%

49%

44%

44%

50%

Distance to Bus Stop

(Chart includes only those aware of a stop in walking distance)

Distance to Stop

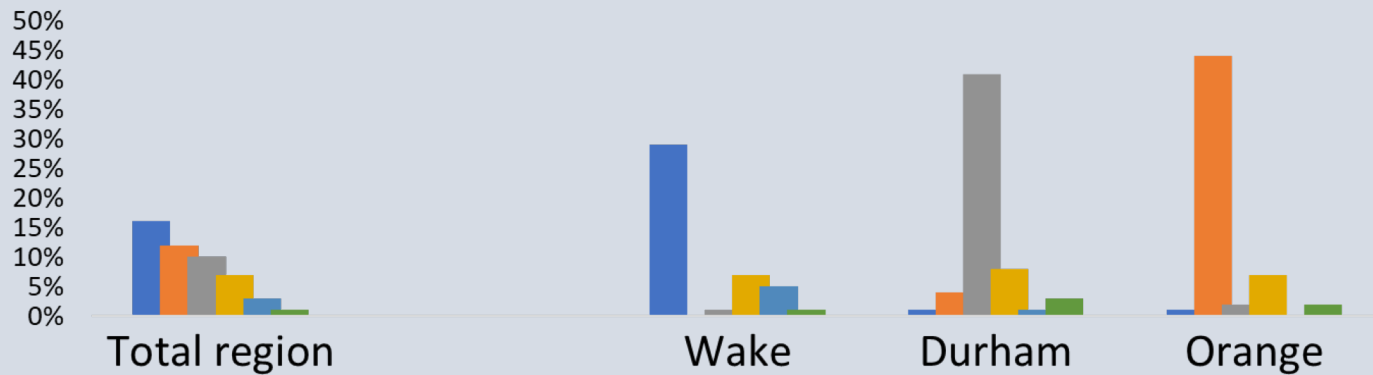


■ Five minutes or less	20%	21%	25%	17%
■ Six to ten minutes	13%	10%	15%	14%
■ Eleven minutes or more	8%	6%	9%	8%

Awareness of Bus system(s) Serving Nearest Bus Stop

[Non-transit users only; Aided awareness]

Q9 Which bus system or systems provide service at that bus stop, GoRaleigh, GoDurham, GoTriangle, GoCary or Chapel Hill Transit?
(Non-transit users only)



	Total region	Wake	Durham	Orange
GoRaleigh	16%	29%	1%	1%
Chapel Hill Transit	12%	0%	4%	44%
GoDurham	10%	1%	41%	2%
GoTriangle	7%	7%	8%	7%
GoCary	3%	5%	1%	0%
A system other than those	1%	1%	3%	2%

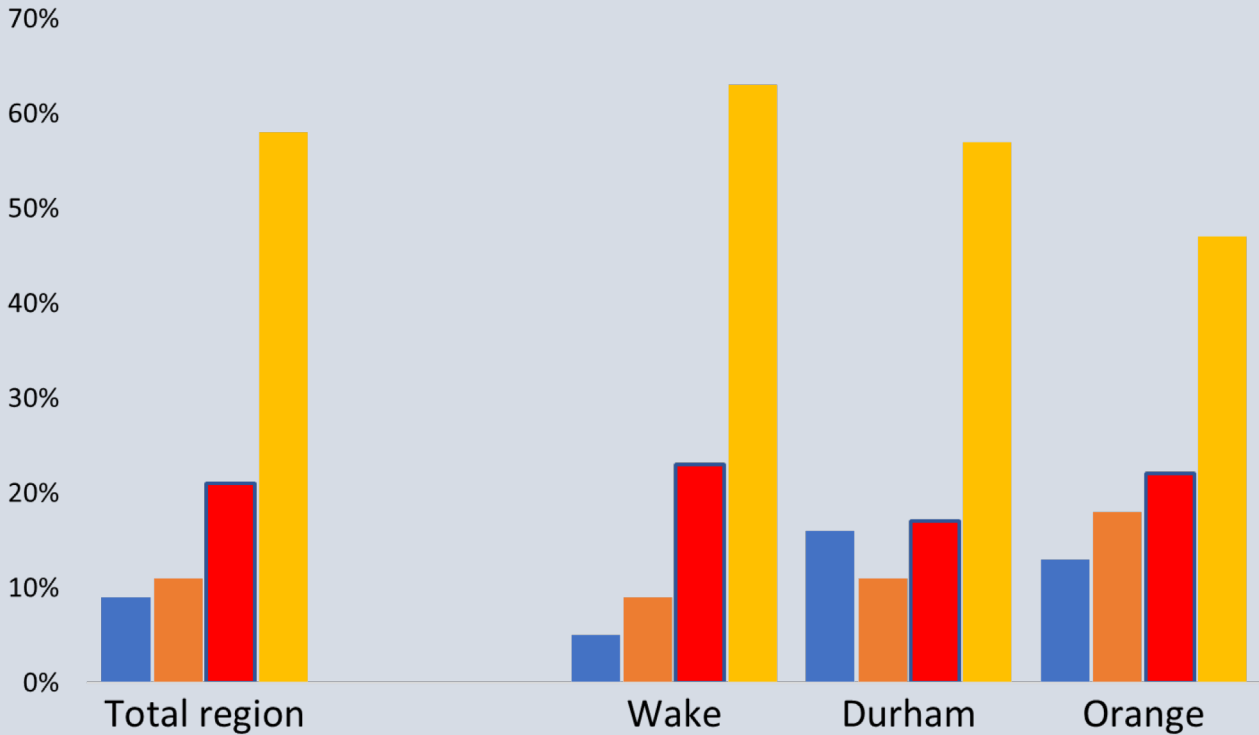
3. Public Transportation Market Profile

Reminder of the Market Index

- “Regular riders” include those who say they use public transportation for their most frequent local trip or who say they use public transportation at least once a month.
- Occasional riders are those who say they used public transportation in the past year, but less often than once a month.
- Those with some potential to use transit said that they would be very likely to use transit service once a month or more if service were “...within walking distance of home, ran every 15 minutes, and within a block or two before they needed to go.”
 - In addition, however, this segment had to *reject* at least two of the three statements that
 - (Q16C) “It just takes too long to get places using public transportation,”
 - (Q16D) “I would not feel safe using the local public buses,” and/or
 - (Q16E) “I just won’t use the bus because I have a car.”
 - Those passing that test were labeled as having “some potential to use transit.”

Market Overview

Use of and interest in using public transportation

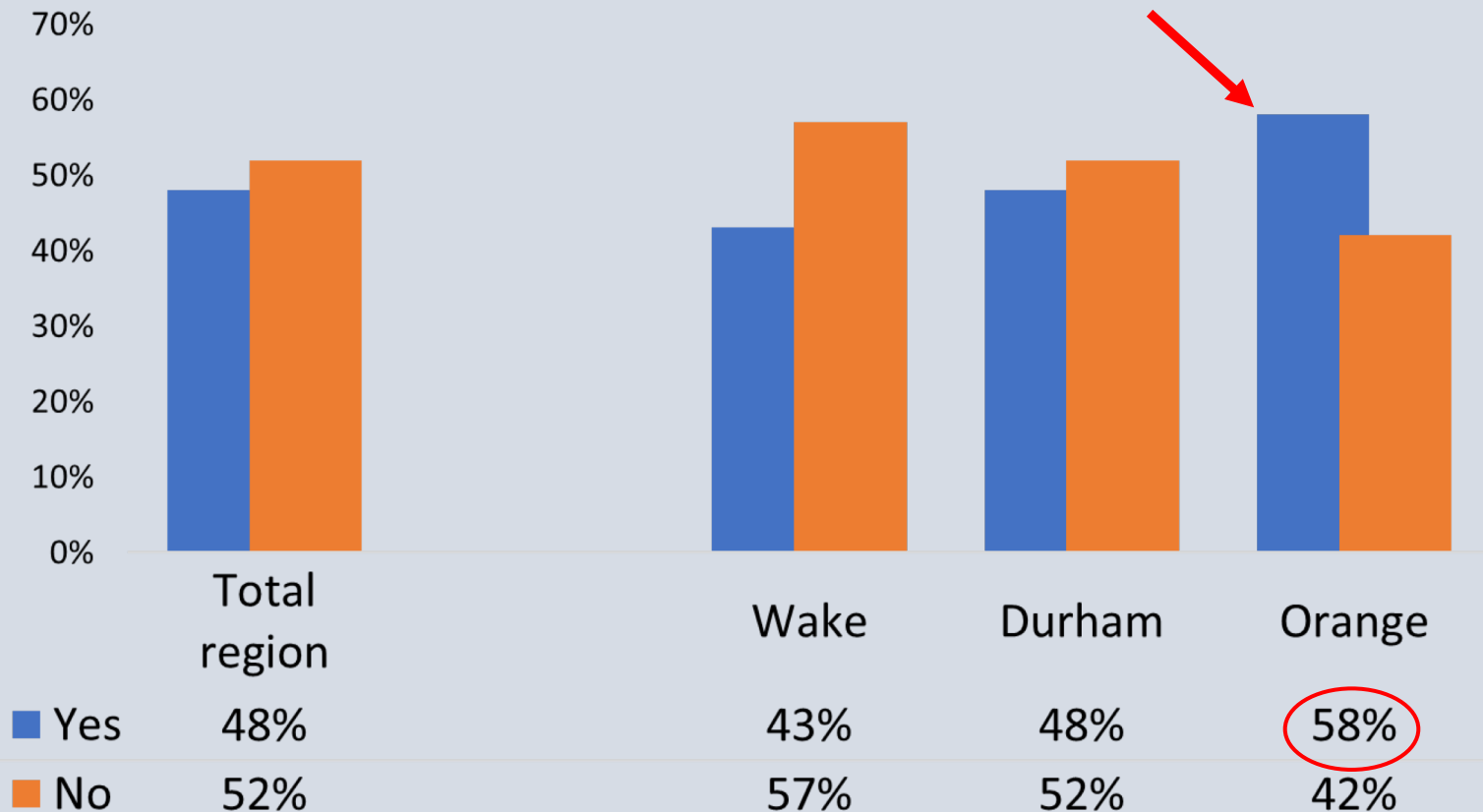


■ Regular rider	9%
■ Occasional Rider	11%
■ Some potential to use transit	21%
■ Rejects using transit	58%

4. Awareness of Transit Improvement Plans

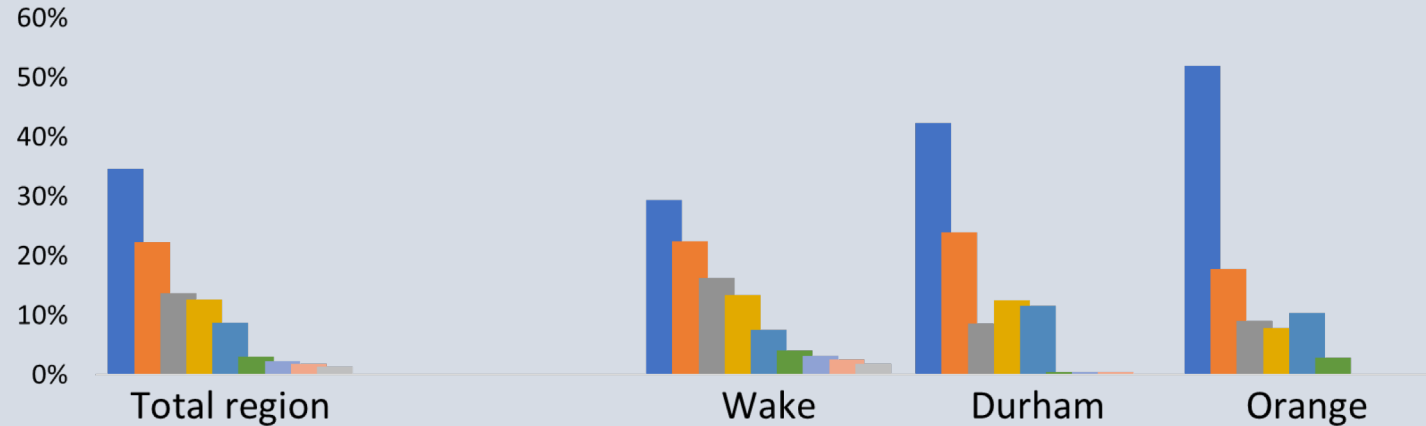
Awareness of Transit Improvement Plans

Q14 Have you heard or read about any plans to improve public transit services in the Triangle Region which consists of Wake, Durham, and Orange counties?



Respondents' Descriptions of What They Know of Plans

Q15 In a few words, can you tell me what new services being planned you may have heard about?
(As a percent of only the 48% saying they had heard of transit improvement plans)



Service	Total region	Wake	Durham	Orange
Light rail	35%	29%	42%	52%
Mentions rail	22%	22%	24%	18%
Expanded bus service	14%	16%	9%	9%
Misc response	13%	13%	13%	8%
Light rail cancelled	9%	7%	12%	10%
BRT	3%	4%	0%	3%
Roadways	2%	3%	0%	0%
Service expansion (general)	2%	2%	0%	0%
Tax	1%	2%	0%	0%

5. Perceptions of Public Transit and of Benefits of Improvement

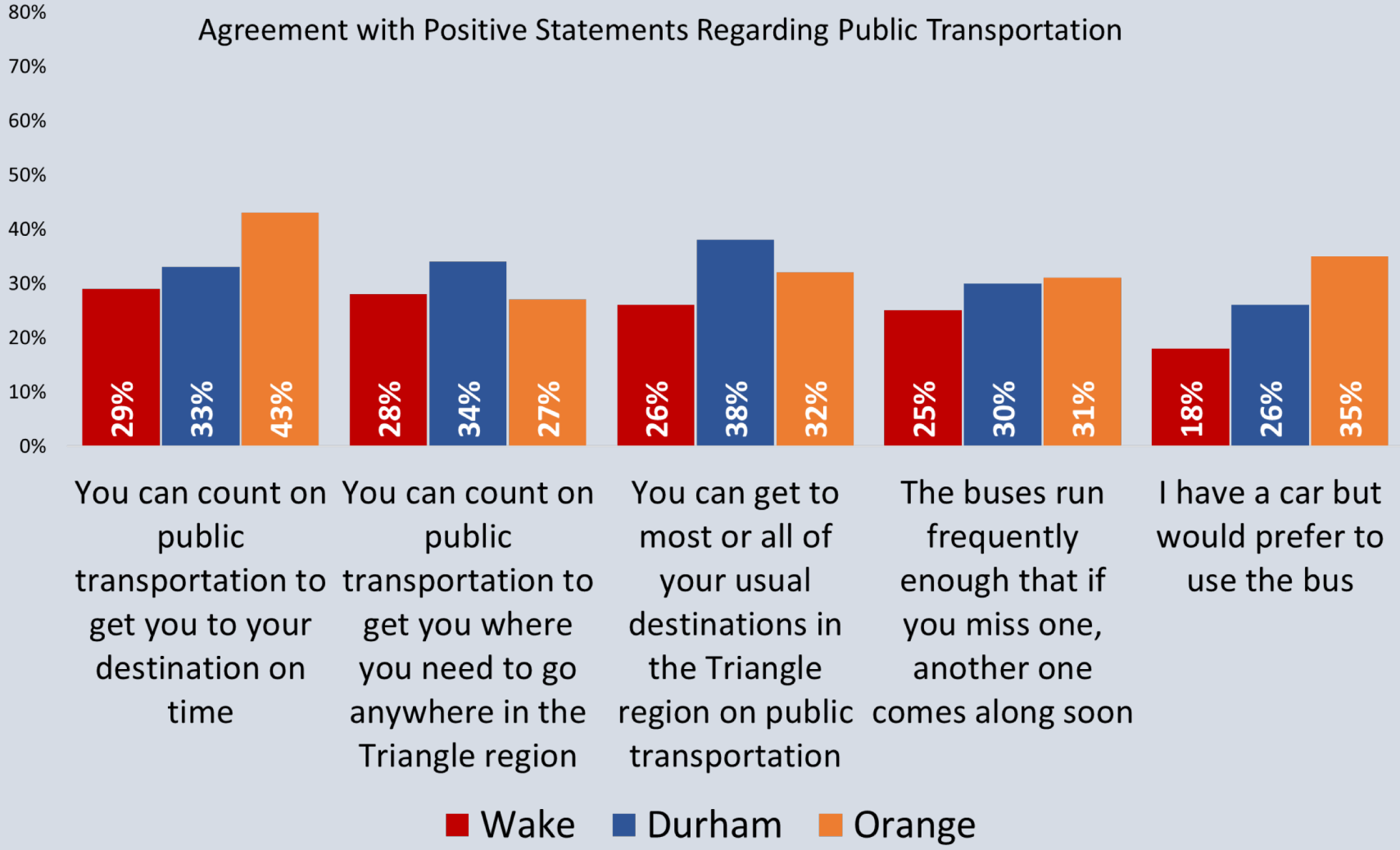
- **Community Benefit to the region**
- **Personal benefit**

Attitudes Toward Public Transportation

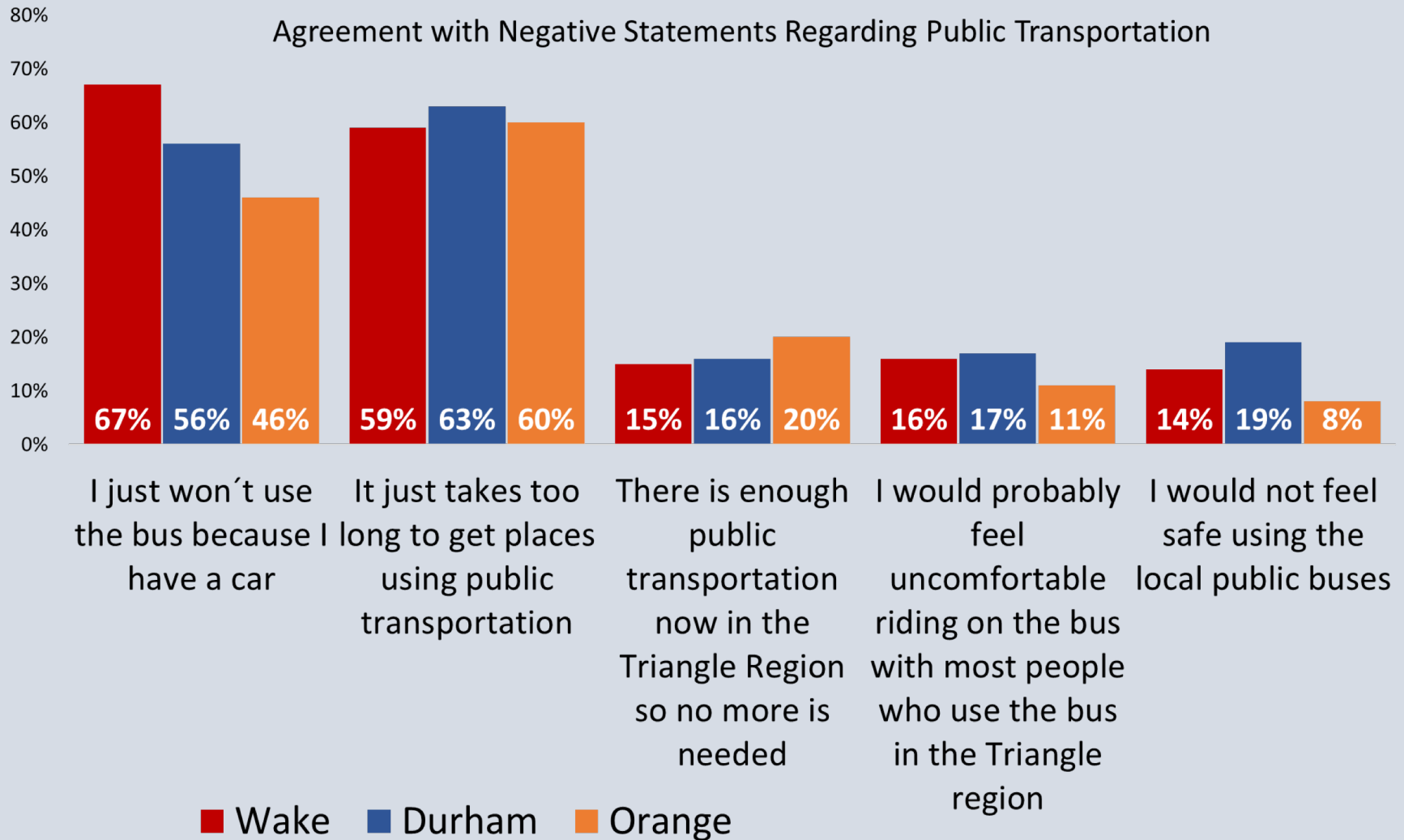
Attitudes toward public transportation in the Triangle Region
Percent who agree with the statements



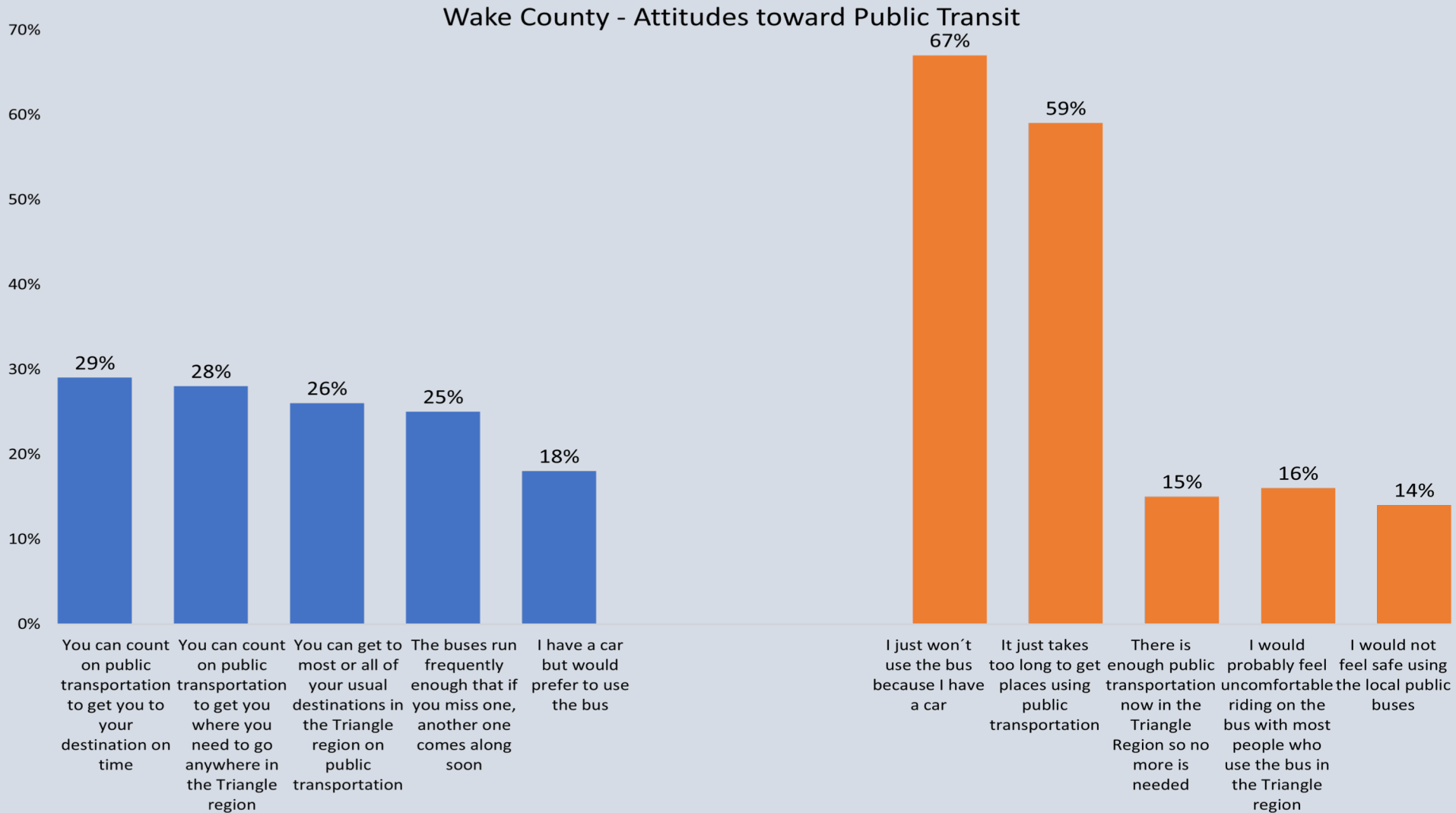
Positive Statements



Agreement with Negative Statements about Public Transportation

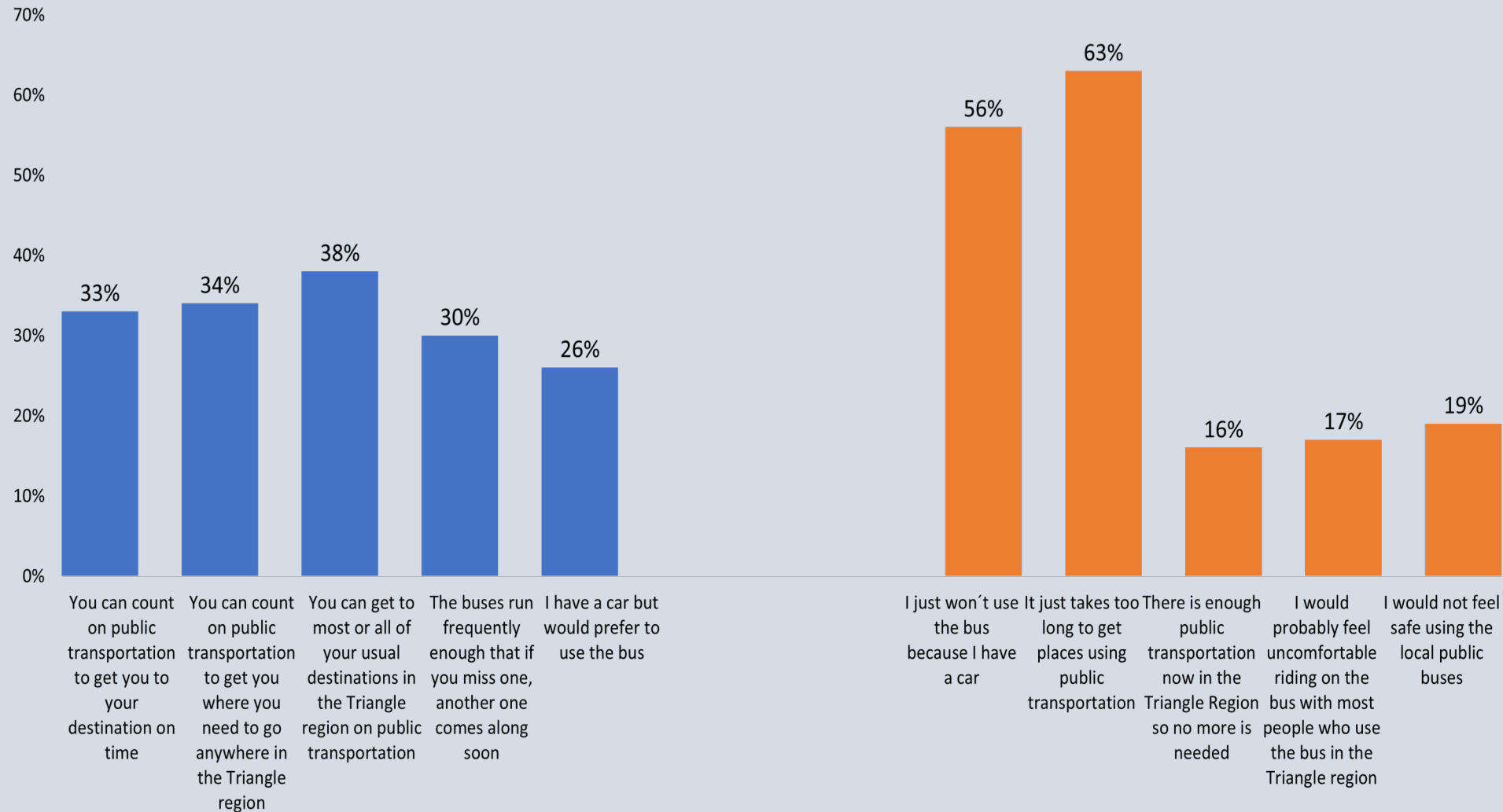


Wake County – Attitudes Toward Public Transit



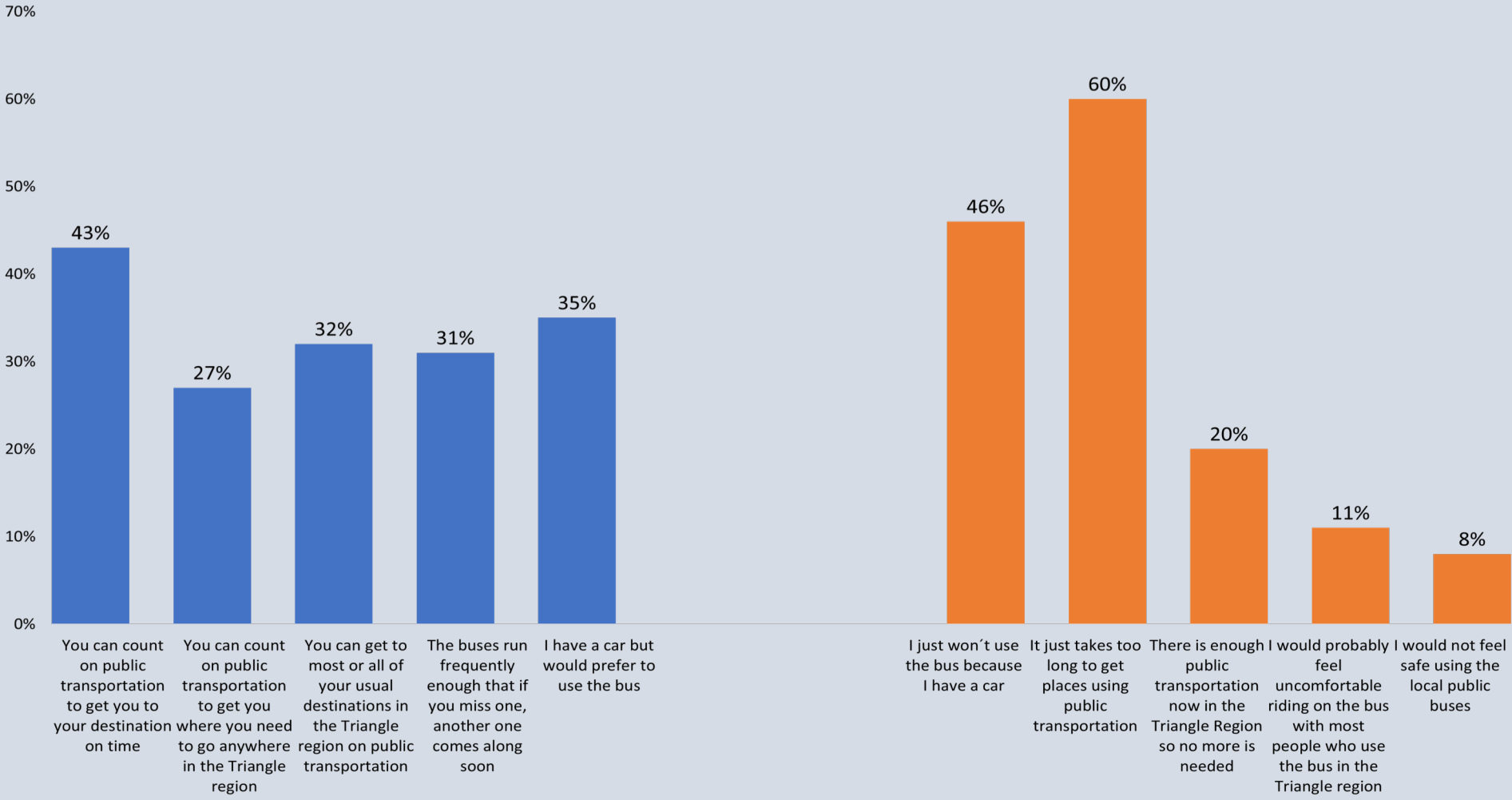
Durham County – Attitudes Toward Public Transit

Durham County - Attitudes toward Public Transit



Orange County – Attitudes Toward Public Transit

Orange County - Attitudes toward Public Transit



Information about Major Transit Improvements

The next questions I will ask you involve major changes being made in public transportation services in the Triangle region.

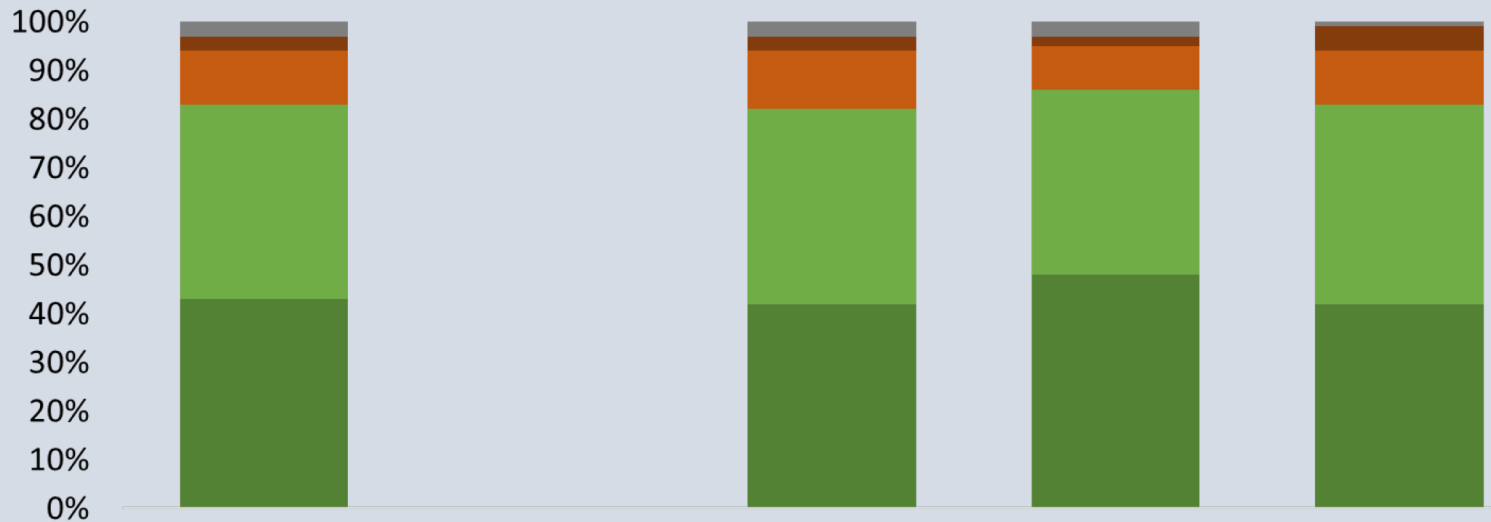
(1) One change is bus service running more often, to more places, for more hours a day and more days a week.

(2) A second change is a new type of service called “Bus Rapid Transit” in which buses run fast in their own lanes separate from traffic. They stop at special sheltered stations rather than usual bus stops. Currently, Bus Rapid Transit is being planned in Raleigh and Chapel Hill.

(3) The third change is to provide peak hour commuter trains that would run between Garner and Durham through Cary, Raleigh, and Research Triangle Park

Transit Improvements and Community Benefit

Q20 Regardless of whether you personally might use any of these services, how much, if at all, do you think that on the whole, they would benefit the Triangle Region?



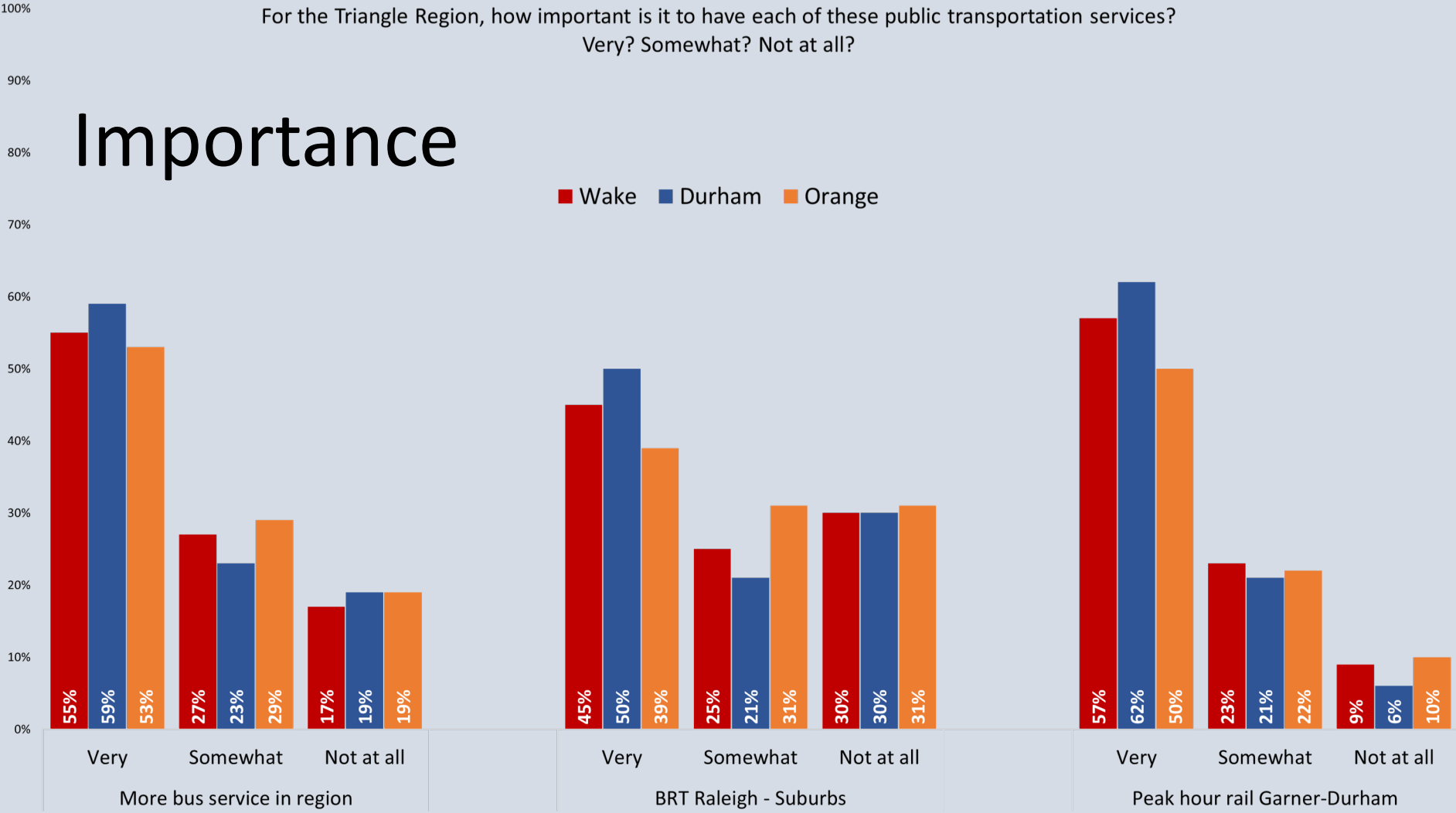
	Total region	Wake	Durham	Orange
[VOL] Not sure	3%	3%	3%	1%
No benefit at all	3%	3%	2%	5%
Very little benefit	11%	12%	9%	11%
Significant benefit	40%	40%	38%	41%
Very major benefit	43%	42%	48%	42%

- [VOL] Not sure
- No benefit at all
- Very little benefit
- Significant benefit
- Very major benefit

Importance of Transit Expansion to Triangle Region

For the Triangle Region, how important is it to have each of these public transportation services?
Very? Somewhat? Not at all?

Importance

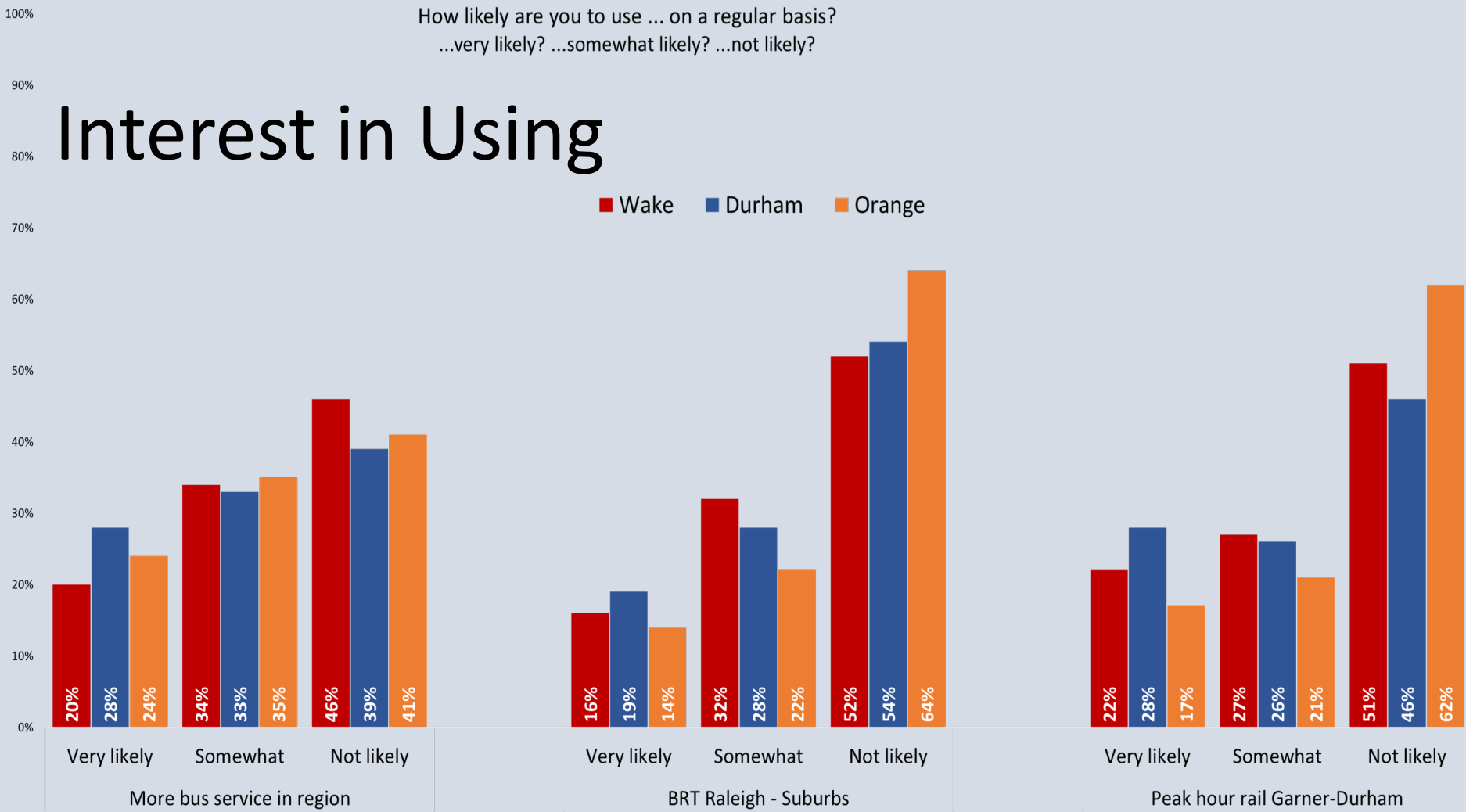


Likely Personal Use of Expanded Transit

How likely are you to use ... on a regular basis?
 ...very likely? ...somewhat likely? ...not likely?

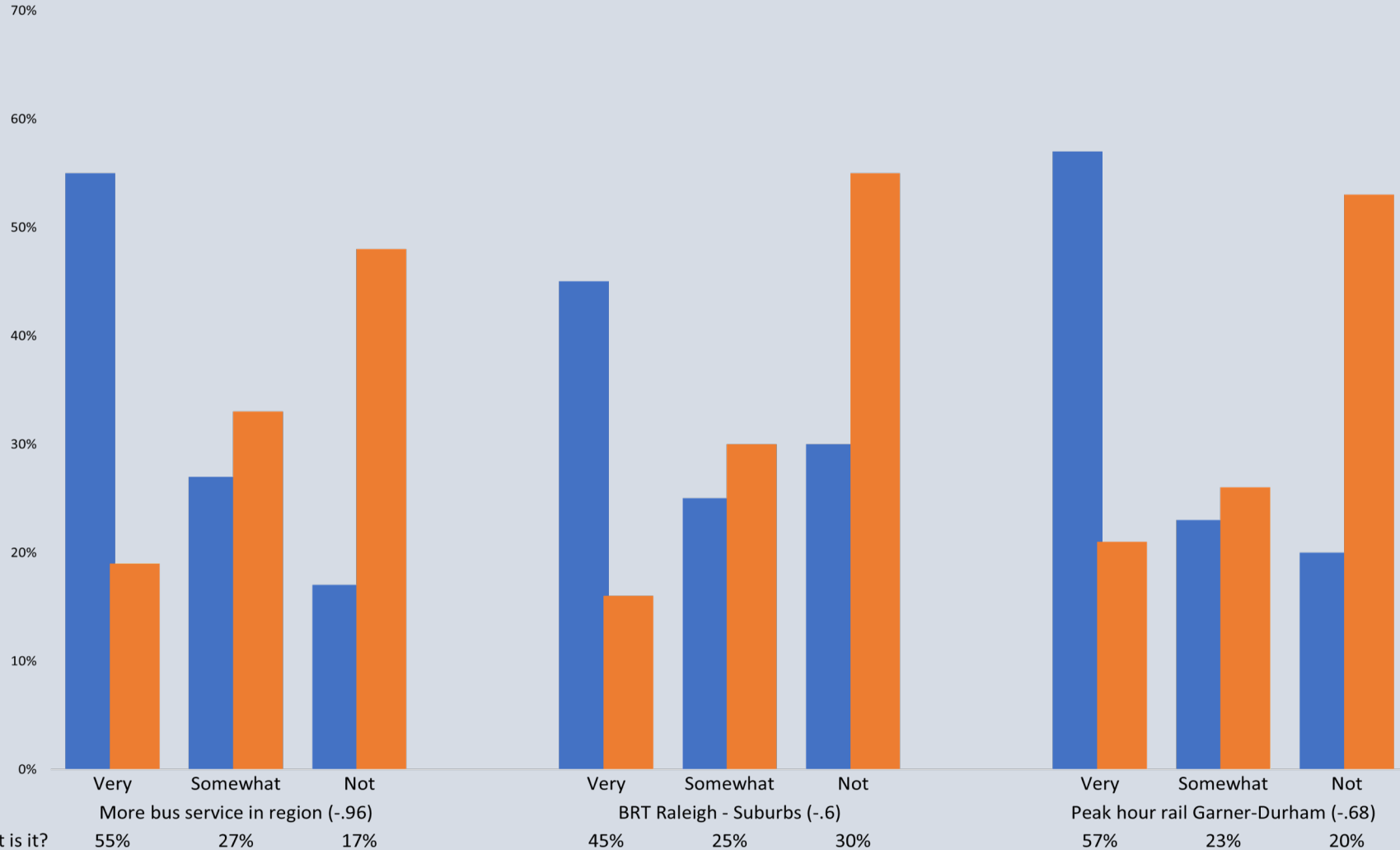
Interest in Using

Wake Durham Orange



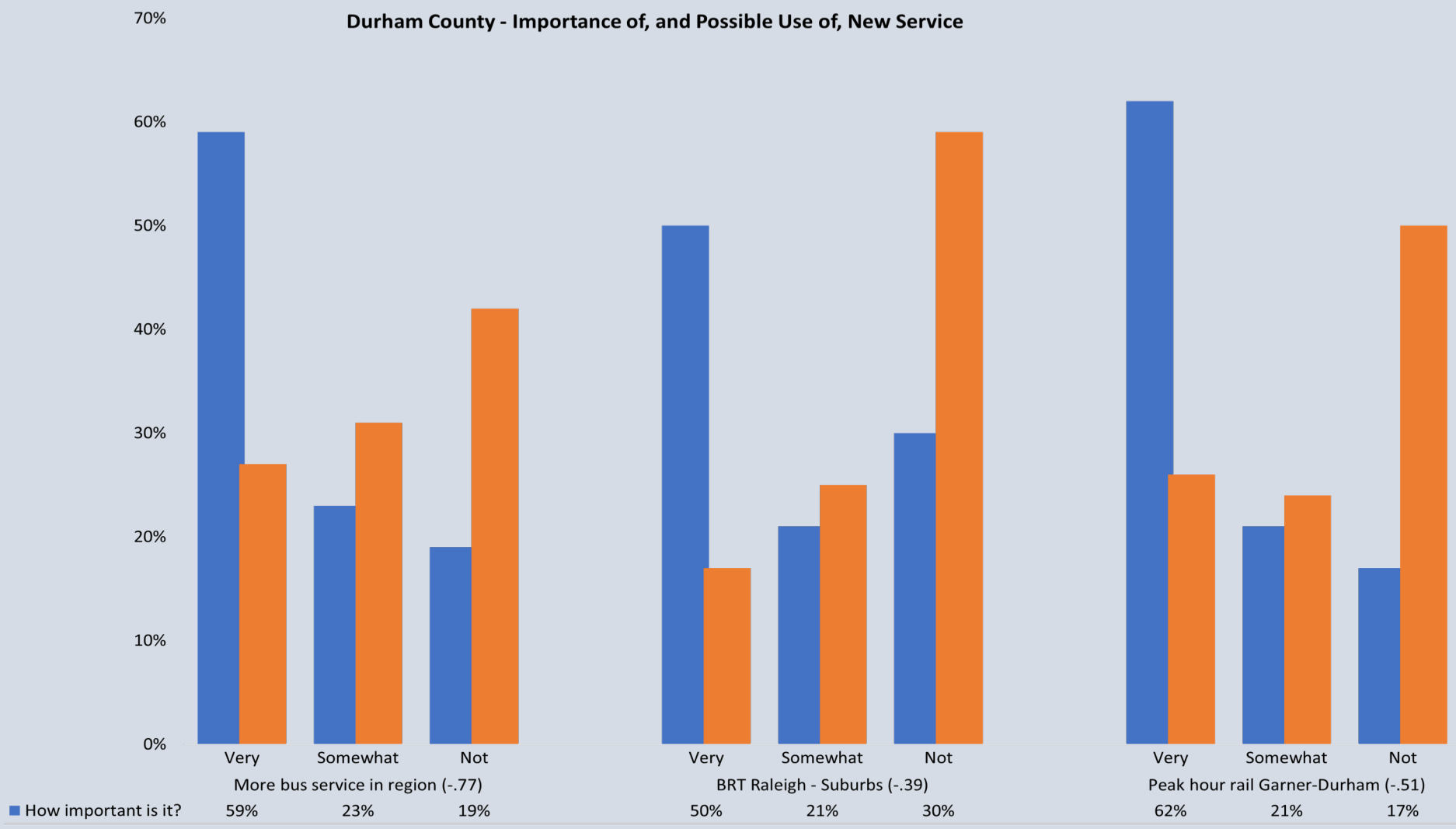
Wake County: Importance of and Likely Use of, Expanded Transit

Wake County - Importance of, and Possible Use of, New Service



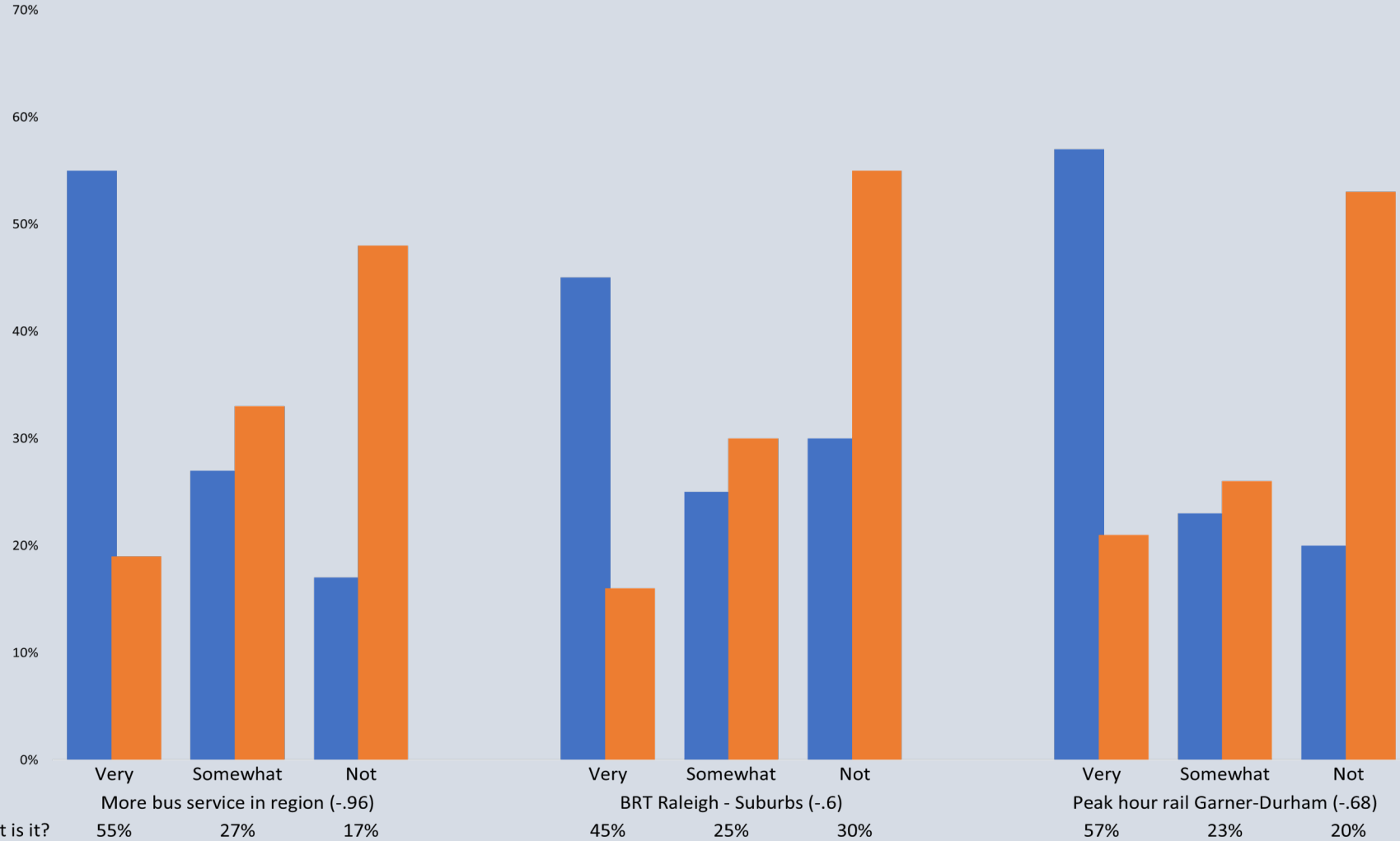
■ How important is it?

Durham County: Importance of and Likely Use of, Expanded Transit



Orange County: Importance of and Likely Use of, Expanded Transit

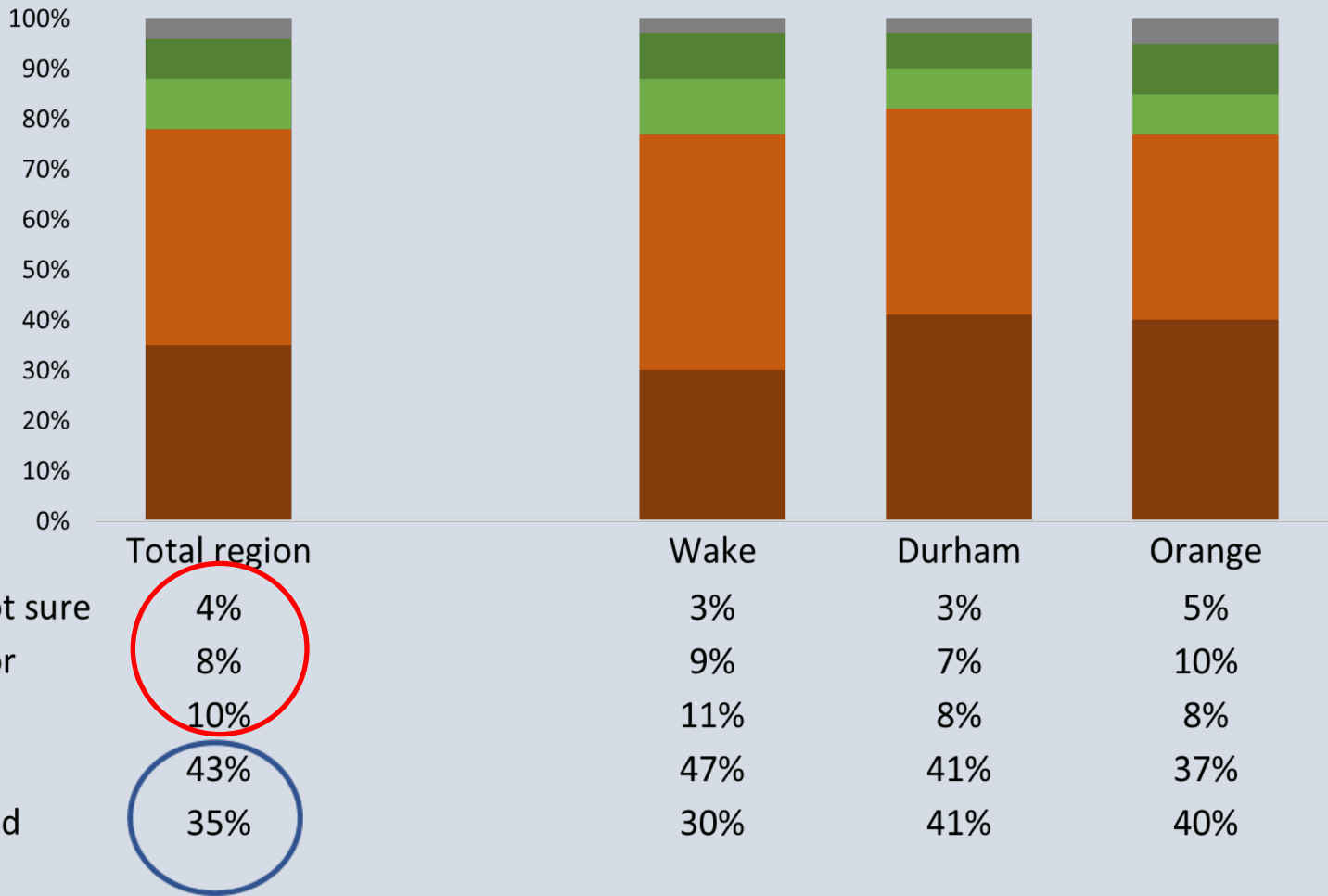
Wake County - Importance of, and Possible Use of, New Service



6. Attitudes Toward Tax Funding of Public Transportation Improvements

Use of Tax Dollars to Fund Transit Improvements

Q21 Funds for these kinds of transit improvements come in part from a half cent sales tax and other taxes in the Triangle Region. Do you consider this to be a very good use of tax dollars, a good use of tax dollars, a poor use of tax dollars or a very poor use of tax dollars?

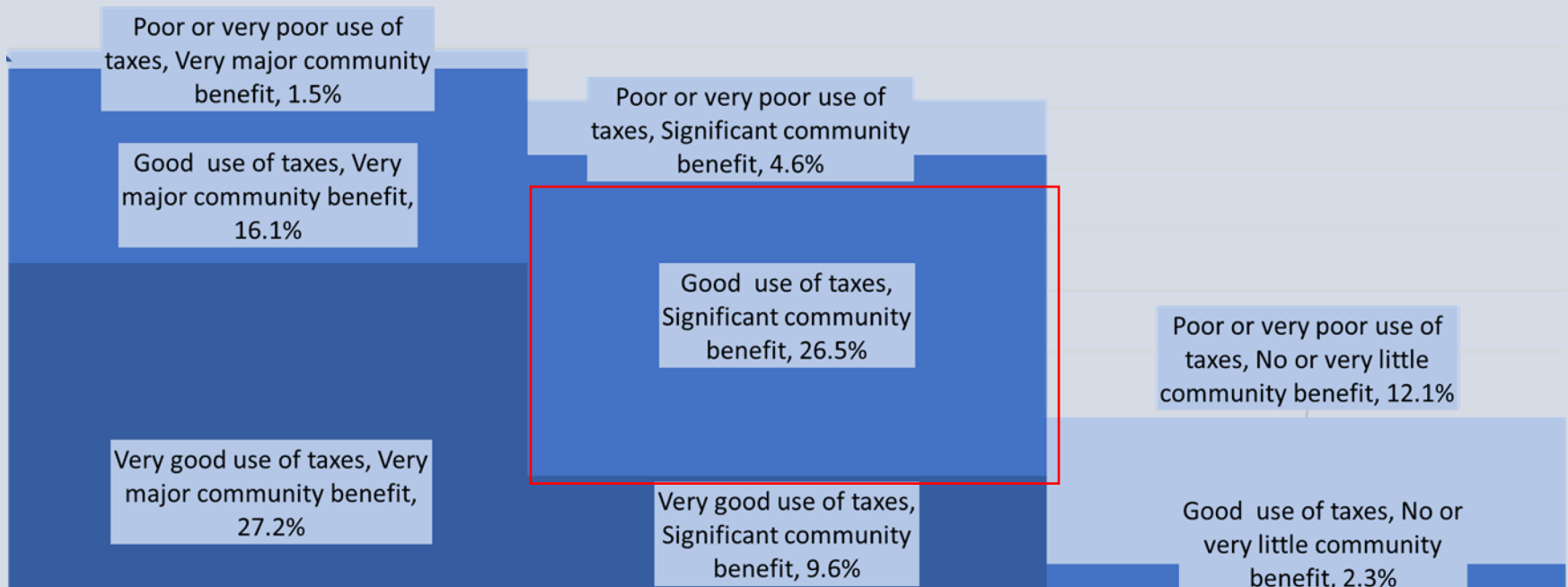


The Dividing Line between Positive and Less Positive View of Taxes for Transit Improvement is between “Very major” and only “Significant” Benefit, not between Some Benefit and No Benefit

Q21 Funds for these kinds of transit improvements come in part from a half cent sales tax and other taxes in the Triangle region. Do you consider this to be ...

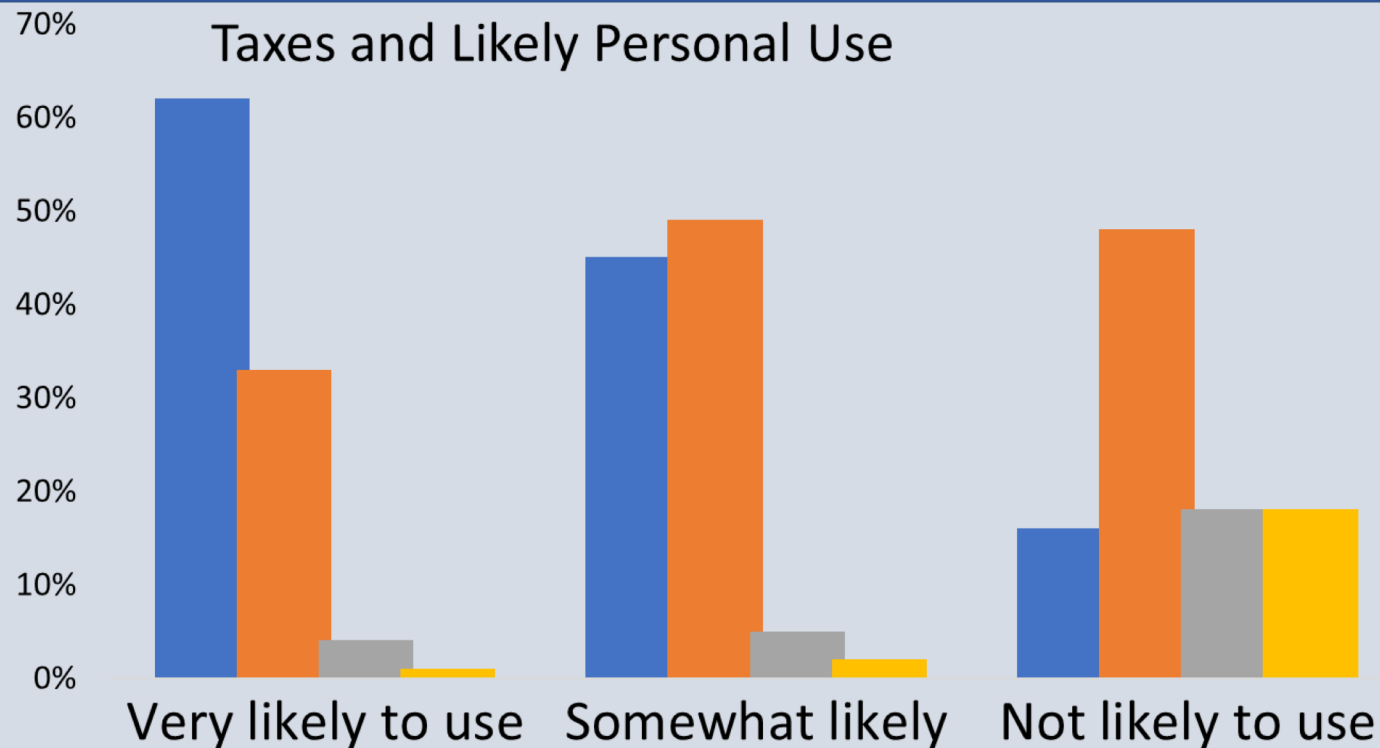
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Q20 Regardless of whether you personally might use any of these services, how much, if at all, do you think that on the whole, they would benefit the Triangle Region?



Taxes and Personal Interest in service

Taxes and Likely Personal Use



Very good use of taxes

62%

45%

16%

Good use of taxes

33%

49%

48%

Poor use of taxes

4%

5%

18%

Very poor use of taxes

1%

2%

18%

Bottom Line

- 9% regular use of transit plus 11% occasional use
 - A base to build on
- Moderate awareness of service among non-users
 - Good awareness base to build on, but needs augmentation
- Attitudes toward relying on use of transit are not positive enough and will require aggressive marketing of new service to build market share
- Considerable awareness of plans for public transportation improvement
 - But still very focused on rail
 - Public awareness needs to be refocused on current programs and away from rail
 - Public education/Marketing will be important
- There is a strong belief in the community benefit of transit expansion
 - And substantial support for use of tax dollars for the purpose
 - The division on the matter of taxes that does exist currently takes the form of strong support v modest support, not between support and opposition
 - However, modest support can become opposition if doubt develops
- Support for the use of tax dollars is related to perception of community benefit, not to likely personal use

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