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
• 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?

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Total region</th>
<th>Wake</th>
<th>Durham</th>
<th>Orange</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work</td>
<td>59%</td>
<td>58%</td>
<td>63%</td>
<td>57%</td>
</tr>
<tr>
<td>Errands, Shopping</td>
<td>32%</td>
<td>35%</td>
<td>25%</td>
<td>34%</td>
</tr>
<tr>
<td>School</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Recreation, social</td>
<td>2%</td>
<td>1%</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td>Medical</td>
<td>1%</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Kids to school</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>2%</td>
</tr>
</tbody>
</table>
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?

<table>
<thead>
<tr>
<th>Mode</th>
<th>Total region</th>
<th>Wake</th>
<th>Durham</th>
<th>Orange</th>
</tr>
</thead>
<tbody>
<tr>
<td>Driving alone all the way</td>
<td>81%</td>
<td>86%</td>
<td>73%</td>
<td>78%</td>
</tr>
<tr>
<td>Driving with other adults or carpooling</td>
<td>12%</td>
<td>10%</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Bus</td>
<td>5%</td>
<td>3%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Other (walk, bike, drive also taking child)</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>
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)

<table>
<thead>
<tr>
<th></th>
<th>Total region</th>
<th>Wake</th>
<th>Durham</th>
<th>Orange</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once a month or more</td>
<td>5%</td>
<td>2%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Just a few times</td>
<td>12%</td>
<td>9%</td>
<td>12%</td>
<td>19%</td>
</tr>
<tr>
<td>Never</td>
<td>83%</td>
<td>89%</td>
<td>81%</td>
<td>72%</td>
</tr>
</tbody>
</table>
Overall level of Transit Use

Transit Use Pattern

<table>
<thead>
<tr>
<th>Location</th>
<th>Regular rider (most frequent trip or once month or more)</th>
<th>Occasional Rider</th>
<th>Non transit user</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entire sample</td>
<td>9%</td>
<td>11%</td>
<td>79%</td>
</tr>
<tr>
<td>Wake</td>
<td>5%</td>
<td>9%</td>
<td>86%</td>
</tr>
<tr>
<td>Durham</td>
<td>16%</td>
<td>11%</td>
<td>74%</td>
</tr>
<tr>
<td>Orange</td>
<td>13%</td>
<td>18%</td>
<td>69%</td>
</tr>
</tbody>
</table>

Triangle Region Community Survey
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)

<table>
<thead>
<tr>
<th>Total region</th>
<th>Wake</th>
<th>Durham</th>
<th>Orange</th>
</tr>
</thead>
<tbody>
<tr>
<td>GoTriangle</td>
<td>14%</td>
<td>11%</td>
<td>16%</td>
</tr>
<tr>
<td>GoRaleigh</td>
<td>13%</td>
<td>20%</td>
<td>3%</td>
</tr>
<tr>
<td>GoDurham</td>
<td>13%</td>
<td>4%</td>
<td>9%</td>
</tr>
<tr>
<td>Chapel Hill</td>
<td>13%</td>
<td>3%</td>
<td>39%</td>
</tr>
<tr>
<td>GoCary</td>
<td>5%</td>
<td>9%</td>
<td>1%</td>
</tr>
<tr>
<td>Wolfline</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Triangle Region Community Survey
Awareness: Knowing about Bus Stops
[Non-transit users only]

Awareness of Bus Stop or Park & Ride

- Total region: 12% knows park & ride, 41% knows stop in walking distance, 47% not sure about stop or P&R
- Wake: 19% knows park & ride, 37% knows stop in walking distance, 44% not sure about stop or P&R
- Durham: 7% knows park & ride, 49% knows stop in walking distance, 44% not sure about stop or P&R
- Orange: 11% knows park & ride, 39% knows stop in walking distance, 50% not sure about stop or P&R

Triangle Region Community Survey
Distance to Bus Stop
(Chart includes only those aware of a stop in walking distance)

Distance to Stop

<table>
<thead>
<tr>
<th></th>
<th>Total region</th>
<th>Wake</th>
<th>Durham</th>
<th>Orange</th>
</tr>
</thead>
<tbody>
<tr>
<td>Five minutes or less</td>
<td>20%</td>
<td>21%</td>
<td>25%</td>
<td>17%</td>
</tr>
<tr>
<td>Six to ten minutes</td>
<td>13%</td>
<td>10%</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Eleven minutes or more</td>
<td>8%</td>
<td>6%</td>
<td>9%</td>
<td>8%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>System</th>
<th>Total Region</th>
<th>Wake</th>
<th>Durham</th>
<th>Orange</th>
</tr>
</thead>
<tbody>
<tr>
<td>GoRaleigh</td>
<td>16%</td>
<td>29%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Chapel Hill Transit</td>
<td>12%</td>
<td>0%</td>
<td>4%</td>
<td>44%</td>
</tr>
<tr>
<td>GoDurham</td>
<td>10%</td>
<td>1%</td>
<td>41%</td>
<td>2%</td>
</tr>
<tr>
<td>GoTriangle</td>
<td>7%</td>
<td>7%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>GoCary</td>
<td>3%</td>
<td>5%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>A system other than those</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>
3. Public Transportation Market Profile
“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

<table>
<thead>
<tr>
<th></th>
<th>Total region</th>
<th>Wake</th>
<th>Durham</th>
<th>Orange</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular rider</td>
<td>9%</td>
<td>5%</td>
<td>16%</td>
<td>13%</td>
</tr>
<tr>
<td>Occasional Rider</td>
<td>11%</td>
<td>9%</td>
<td>11%</td>
<td>18%</td>
</tr>
<tr>
<td>Some potential to use transit</td>
<td>21%</td>
<td>23%</td>
<td>17%</td>
<td>22%</td>
</tr>
<tr>
<td>Rejects using transit</td>
<td>58%</td>
<td>63%</td>
<td>57%</td>
<td>47%</td>
</tr>
</tbody>
</table>

Triangle Region Community Survey
4. 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?

- Total region: Yes 48%, No 52%
- Wake: Yes 43%, No 57%
- Durham: Yes 48%, No 52%
- Orange: Yes 58%, No 42%
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)

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

- Q16J I have a car but would prefer to use the bus: 24%
- Q16G The buses run frequently enough that if you miss one, another one comes along soon: 28%
- Q16H You can get to most or all of your usual destinations in the Triangle region on public transportation: 29%
- Q16F You can count on public transportation to get you where you need to go anywhere in the Triangle region: 29%
- Q16I You can count on public transportation to get you to your destination on time: 34%
- Q16D I would not feel safe using the local public buses: 15%
- Q16C I would probably feel uncomfortable riding the bus with most people who use the bus in the Triangle region: 16%
- Q16A There is enough public transportation now in the Triangle Region so no more is needed: 17%
- Q16B It just takes too long to get places using public transportation: 60%
- Q16E I just won’t use the bus because I have a car: 60%
Positive Statements

Agreement with Positive Statements Regarding Public Transportation

- **You can count on public transportation to get you to your destination on time**
  - Wake: 29%
  - Durham: 33%
  - Orange: 43%

- **You can count on public transportation to get you where you need to go anywhere in the Triangle region**
  - Wake: 28%
  - Durham: 34%
  - Orange: 27%

- **You can get to most or all of your usual destinations in the Triangle region on public transportation**
  - Wake: 26%
  - Durham: 38%
  - Orange: 32%

- **The buses run frequently enough that if you miss one, another one comes along soon**
  - Wake: 25%
  - Durham: 30%
  - Orange: 31%

- **I have a car but would prefer to use the bus**
  - Wake: 18%
  - Durham: 26%
  - Orange: 35%
Agreement with Negative Statements about Public Transportation

Agreement with Negative Statements Regarding Public Transportation

- I just won’t use the bus because I have a car: Wake 67%, Durham 56%, Orange 46%
- It just takes too long to get places using public transportation: Wake 60%, Durham 63%, Orange 59%
- There is enough public transportation now in the Triangle Region so no more is needed: Wake 20%, Durham 16%, Orange 15%
- I would probably feel uncomfortable riding on the bus with most people who use the bus in the Triangle region: Wake 11%, Durham 17%, Orange 16%
- I would not feel safe using the local public buses: Wake 19%, Durham 14%, Orange 8%

CJI Research

Triangle Region Community Survey
Wake County – Attitudes Toward Public Transit

Wake County - Attitudes toward Public Transit

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I just won’t use the bus because I have a car</td>
<td>67%</td>
</tr>
<tr>
<td>It just takes too long to get places using public transportation</td>
<td>59%</td>
</tr>
<tr>
<td>There is enough public transportation now in the Triangle Region so no more is needed</td>
<td>15%</td>
</tr>
<tr>
<td>I would probably feel uncomfortable riding on the bus with most people who use the bus in the Triangle region</td>
<td>16%</td>
</tr>
<tr>
<td>I would not feel safe using local public buses</td>
<td>14%</td>
</tr>
</tbody>
</table>

You can count on public transportation to get you to your destination on time: 29%
You can count on public transportation to get you where you need to go anywhere in the Triangle region: 28%
You can get to most or all of your usual destinations in the Triangle region on public transportation: 26%
The buses run frequently enough that if you miss one, another one comes along soon: 25%
I have a car but would prefer to use the bus: 18%
Durham County – Attitudes Toward Public Transit

Durham County - Attitudes toward Public Transit

- You can count on public transportation to get you to your destination on time: 33%
- You can count on public transportation to get you where you need to go anywhere in the Triangle region: 34%
- You can get to most or all of your usual destinations in the Triangle region on public transportation: 38%
- The buses run frequently enough that if you miss one, another one comes along soon: 30%
- I have a car but would prefer to use the bus: 26%

- I just won’t use the bus because I have a car: 56%
- It just takes too long to get to places using public transportation: 63%
- There is enough public transportation now in the Triangle Region so no more is needed: 16%
- I would probably feel uncomfortable riding on the bus with most people who use the bus in the Triangle region: 17%
- I would not feel safe using the local public buses: 19%

Triangle Region Community Survey
Orange County – Attitudes Toward Public Transit

Orange County - Attitudes toward Public Transit

- You can count on public transportation to get you to your destination on time: 43%
- You can count on public transportation to get you where you need to go anywhere in the Triangle region: 27%
- You can get to most or all of your usual destinations in the Triangle region on public transportation: 32%
- The buses run frequently enough that if you miss one, another one comes along soon: 31%
- I have a car but would prefer to use the bus: 35%

- I just won’t use the bus because I have a car: 46%
- It just takes too long to get places using public transportation: 60%
- There is enough public transportation now in the Triangle Region so no more is needed: 20%
- I would probably feel uncomfortable riding on the bus with most people who use the bus in the Triangle region: 11%
- I would not feel safe using the local public buses: 8%
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.
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?

<table>
<thead>
<tr>
<th>Category</th>
<th>Total Region</th>
<th>Wake</th>
<th>Durham</th>
<th>Orange</th>
</tr>
</thead>
<tbody>
<tr>
<td>VOL Not sure</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>No benefit at all</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Very little benefit</td>
<td>11%</td>
<td>12%</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>Significant benefit</td>
<td>40%</td>
<td>40%</td>
<td>38%</td>
<td>41%</td>
</tr>
<tr>
<td>Very major benefit</td>
<td>43%</td>
<td>42%</td>
<td>48%</td>
<td>42%</td>
</tr>
</tbody>
</table>
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

- More bus service in region
  - Wake: 55%, 59%, 53%
  - Durham: 53%, 27%, 29%
  - Orange: 29%, 17%, 19%

- BRT Raleigh - Suburbs
  - Very: 45%, 50%, 39%
  - Somewhat: 39%, 25%, 21%
  - Not at all: 31%, 31%, 31%

- Peak hour rail Garner-Durham
  - Very: 57%, 62%, 50%
  - Somewhat: 50%, 31%, 23%
  - Not at all: 23%, 22%, 9%
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

- More bus service in region:
  - Wake: 20%
  - Durham: 24%
  - Orange: 34%

- BRT Raleigh - Suburbs:
  - Very likely: 16%
  - Somewhat likely: 32%
  - Not likely: 54%

- Peak hour rail Garner-Durham:
  - Very likely: 22%
  - Somewhat likely: 27%
  - Not likely: 51%
Wake County: Importance of and Likely Use of, Expanded Transit

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

- How important is it? (Very, Somewhat, Not)
  - More bus service in region: Very 55%, Somewhat 27%, Not 17%
  - BRT Raleigh - Suburbs: Very 45%, Somewhat 25%, Not 30%
  - Peak hour rail Garner-Durham: Very 57%, Somewhat 23%, Not 20%
Durham County:
Importance of and Likely Use of, Expanded Transit

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

<table>
<thead>
<tr>
<th>How important is it?</th>
<th>Very</th>
<th>Somewhat</th>
<th>Not</th>
</tr>
</thead>
<tbody>
<tr>
<td>More bus service in region (-.77)</td>
<td>59%</td>
<td>23%</td>
<td>19%</td>
</tr>
<tr>
<td>BRT Raleigh - Suburbs (-.39)</td>
<td>50%</td>
<td>21%</td>
<td>30%</td>
</tr>
<tr>
<td>Peak hour rail Garner-Durham (-.51)</td>
<td>62%</td>
<td>21%</td>
<td>17%</td>
</tr>
</tbody>
</table>
6. Attitudes Toward Tax Funding of Public Transportation 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?

- Total region:
  - [VOL] Not sure: 4%
  - Very poor: 8%
  - Poor: 10%
  - Good: 43%
  - Very good: 35%

- Wake:
  - [VOL] Not sure: 3%
  - Very poor: 9%
  - Poor: 11%
  - Good: 47%
  - Very good: 30%

- Durham:
  - [VOL] Not sure: 3%
  - Very poor: 7%
  - Poor: 8%
  - Good: 41%
  - Very good: 41%

- Orange:
  - [VOL] Not sure: 5%
  - Very poor: 10%
  - Poor: 8%
  - Good: 37%
  - Very good: 40%
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 ...

by

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?

- Poor or very poor use of taxes, Very major community benefit, 1.5%
- Good use of taxes, Very major community benefit, 16.1%
- Very good use of taxes, Very major community benefit, 27.2%
- Poor or very poor use of taxes, Significant community benefit, 26.5%
- Good use of taxes, Significant community benefit, 9.6%
- Poor or very poor use of taxes, No or very little community benefit, 12.1%
- Good use of taxes, No or very little community benefit, 2.3%
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