Visualize 2045: "Voices of the Region"
Public Opinion Survey Results

Background: The board will be briefed on the results from a region-wide public opinion survey that the TPB conducted last fall. The survey will provide input for a range of TPB planning activities, including the 2022 update to Visualize 2045.
MEMORANDUM

TO: Transportation Planning Board

FROM: Karen Armendariz, TPB Public Engagement Specialist
       Stacy Cook, TPB Transportation Planner
       John Swanson, TPB Transportation Planner

SUBJECT: Voices of the Region: Public Opinion Survey for Visualize 2045 Update

DATE: February 11, 2021

At the February board meeting, TPB staff will release results from a region-wide public opinion survey on transportation that the TPB conducted last fall. The survey’s findings, which are statistically significant, will provide input for a range of TPB planning activities, including the 2022 update to Visualize 2045, the region’s long-range transportation plan.

PURPOSE AND CONTENT

The results of this survey are expected to be used by the TPB, member jurisdictions, and elected officials as quantitative support for any projects, programs or policies that align with the TPB’s Planning Policy Focus Areas and Aspirational Initiatives.

The driving theme for the Visualize 2045 engagement efforts is “Visualizing our Future Together.” In order to visualize 2045 together, regional leaders will need to understand public opinion trends in three different ways, which were explored in the opinion survey (also see attached questionnaire):

- **Travel During the COVID-19 Pandemic**
  This section asked the public about their transportation choices in the midst of COVID-19. The purpose of this section is to understand how people adapted to the current health crisis and how these changes might affect long-term travel patterns and choices in the future.

- **Our Transportation Future**
  This section asked the public to consider our current transportation system and determine what implementation activities would make transportation options more appealing in the future.

- **External Forces and Future Factors**
  This section focused on factors that will affect how agencies plan for the transportation system in the future, including climate change, connected and automated vehicles, and efforts to continue advancing transportation equity in the region. These results will inform other work that TPB is or will be conducting on these topics.

METHODOLOGY

ICF International, the consultant firm hired for the survey, developed a methodology that utilized a representative address-based sample frame to select potential respondents who were contacted via
mail and encouraged to complete the survey via web. The survey team sent up to three contacts to randomly selected participants, seeking to ensure that feedback was obtained from as many people as possible, including those who may have been initially reluctant to respond.

This effort obtained 2,407 completed surveys, greatly exceeding the target of 2,000. The final response rate was 11.9%, which provided a margin of error of +/-2.5% at 95% confidence.

The survey was designed to be statistically valid for the following 10 geographic areas: District of Columbia, Charles County, Frederick County (including City of Frederick), Montgomery County (including Gaithersburg, Rockville, and Takoma Park), Prince George’s County (including Bowie, College Park, and Laurel), the City of Alexandria, Arlington County, Fairfax County (including City of Fairfax, and Falls Church), Loudoun County and the Prince William County area (including Manassas and Manassas Park). Results from the survey will be available for these 10 geographies.

**SCHEDULE**

The project followed the following schedule:

- July-August 2020: Survey methodology and instrument were designed.
- September-October 2020: Randomly selected participants were invited to participate, and responses were collected
- November-December 2020: Responses were analyzed
- January 2021: Initial results were reviewed and released
- February 2021: Findings presented to the TPB and committees
- March-April 2021: Final Report scheduled to be released
- Spring-Summer: Findings from the survey will be incorporated into Visualize 2045 and other TPB planning products and activities

In addition to input obtained through the survey, staff recently completed 11 focus groups to obtain a more complete and nuanced understanding of public attitudes. These sessions explored opinions about equity, safety, and climate change. The findings of the focus groups will be reported to the TPB within a few months.

The quantitative (survey) and qualitative (focus groups) opinion research efforts, as described above, will comprise Phase I public engagement activities for the update to Visualize 2045. Later this spring and summer, staff will conduct Phase II engagement activities, which will provide open opportunities for input focused on implementation of the TPB’s Aspirational Initiatives.

**CONTACT**

For more information, please contact:

- Karen Armendariz, karmendariz@mwcog.org
- Stacy Cook, scook@mwcog.org
- John Swanson, jswanson@mwcog.org
Welcome to the Voices of the Region Survey!

This survey will help local governments across the region plan future transportation initiatives and programs. The information and opinions you share will help regional leaders adapt to unexpected events and future challenges, as well as identifying changes that can make a positive difference for the future – both next year and 25 years from now.
Thank you in advance for your cooperation in this important survey! Please enter the 9-digit PIN from the letter you received.

SECTION 1: TRAVEL DURING THE COVID-19 PANDEMIC (24 QUESTIONS)

**S1_INTRO1**

We want to know about your travel habits in general, but we realize that COVID-19 has changed many peoples’ travel habits and plans since stay-at-home orders began in March.

For this survey, “travel” refers to all the different ways you get around, whether driving, walking, biking, taking public transportation, scooters, skateboards, or anything else. We’re interested in all your travel, including commuting for work, visiting friends, going to the grocery store, taking trips out of town, and anywhere else you might travel.

**GENERAL TRAVEL DURING COVID**

**ASK ALL**

**S1Q1.** Since the beginning of the COVID-19 pandemic, how much have your daily travel habits changed?

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<tbody>
<tr>
<td>01</td>
<td>A lot</td>
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<td>02</td>
<td>Some</td>
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<tr>
<td>03</td>
<td>A little</td>
</tr>
<tr>
<td>04</td>
<td>None</td>
</tr>
</tbody>
</table>

**ASK ALL**

**S1Q2.** Prior to the COVID-19 pandemic, how often on average did you drive or ride in a car? By car we mean a single motor vehicle such as a car, SUV, pick-up truck etc.

<p>| | |</p>
<table>
<thead>
<tr>
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<tbody>
<tr>
<td>01</td>
<td>Three or more trips a day</td>
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<tr>
<td>02</td>
<td>One or two trips a day</td>
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<tr>
<td>03</td>
<td>Three or more trips a week, but not every day</td>
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<tr>
<td>04</td>
<td>One or two trips a week</td>
</tr>
<tr>
<td>05</td>
<td>Three or more trips a month, but not every week</td>
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<tr>
<td>06</td>
<td>One or two trips a month</td>
</tr>
<tr>
<td>07</td>
<td>Less than that</td>
</tr>
<tr>
<td>08</td>
<td>I never drove or rode in a car</td>
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</table>

**ASK ALL**

**S1Q3.** Since the beginning of the COVID-19 pandemic, how much has your car use changed? Would you say you drive or ride in a car...

<p>| | |</p>
<table>
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<tbody>
<tr>
<td>01</td>
<td>A lot more</td>
</tr>
<tr>
<td>02</td>
<td>A little more</td>
</tr>
</tbody>
</table>
Prior to the COVID-19 pandemic, how often on average did you take public transportation?

01  Three or more trips every day
02  One or two trips a day
03  Three or more trips a week, but not every day
04  One or two trips a week
05  Three or more trips a month, but not every day
06  One or two trips a month
07  Less than that
08  I never took public transportation

Since the beginning of the COVID-19 pandemic, how has your use of public transportation changed? Would you say you take public transportation...

01  A lot more
02  A little more
03  The same amount as before COVID-19
04  A little less
05  A lot less, including no use of public transportation

One year after the COVID-19 pandemic is over, which of these changes would make you more likely to use public transportation? (check all that apply)

01. More spacing between people on buses or train cars
02. More frequent cleaning of buses or train cars
03. More frequent service
04. Riding a bus with limited stops
05. Plastic barriers to prevent the spread of COVID-19
06. Other (Specify) [TEXT BOX]
07. Nothing will make me more likely to ride public transportation after the pandemic [EXCLUSIVE]

Since the beginning of the COVID-19 pandemic, how has your walking changed? Would you say you walk...

01  A lot more
02  A little more
ASK ALL

**S1Q8.** Prior to the COVID-19 pandemic, how often on average did you ride a bicycle?

- 01 Three or more trips a day
- 02 One or two trips a day
- 03 Three or more trips a week
- 04 One or two trips a week
- 05 Three or more trips a month
- 06 One or two trips a month
- 07 Less than that
- 08 I never rode a bicycle

ASK ALL

**S1Q9.** Since the beginning of the COVID-19 pandemic, how has your biking changed? Would you say you bike...

- 01 A lot more
- 02 A little more
- 03 The same amount as before COVID-19
- 04 A little less
- 05 A lot less
- 06 I do not bike

ASK ALL

**S1Q10.** Please think about your travel habits one year after the COVID-19 pandemic is over. Do you expect that your travel habits will return to your previous pattern before the pandemic?

- 01 Yes, I will probably go back to the same travel habits as before the pandemic
- 02 No, I will probably have different travel habits than before the pandemic

ASK IF S1Q10 = 02 [MUL=8]

**S1Q11.** How do you expect your travel will be different once the pandemic is over? I expect I will...

(Select all that apply)

- 01 Drive or ride in cars less than before the pandemic
- 02 Drive or ride in cars more than before the pandemic
- 03 Use public transportation less than before the pandemic
- 04 Use public transportation more than before the pandemic
- 05 Walk less than before the pandemic
- 06 Walk more than before the pandemic
- 07 Will bike less than before the pandemic
- 08 Will bike more than before the pandemic
## COMMUTING AND JOB-RELATED TRAVEL

**ASK ALL [MUL=8]**

**S1Q13.** Before the COVID-19 pandemic, what was your employment situation? (Select all that apply)

- 01 Working full time
- 02 Working part time
- 03 Student
- 04 Stay at home parent or caretaker
- 05 Unemployed or furloughed
- 06 Retired
- 07 Other (Specify) [TEXT BOX]

**ASK ALL [MUL=8]**

**S1Q14.** What is your current employment situation during the COVID-19 pandemic? (Select all that apply)

- 01 Working full-time
- 02 Working part time
- 03 Student
- 04 Stay at home parent or caretaker
- 05 Unemployed or furloughed
- 06 Retired
- 07 Other (Specify) [TEXT BOX]

**ASK IF S1Q14 = 01 OR 02**

**S1Q15.** Do you need to travel outside your home during the COVID-19 pandemic to economically support yourself or your family?

- 01 Yes
- 02 No

**ASK IF S1Q14 = 01, 02, 03 [MUL=6]**

**S1Q16.** Are you considered an essential worker who is required to travel outside your home for a job in the following industries (check all that apply)?

- 01 Grocery store
- 02 Health care
- 03 Public works
- 04 Government
- 06 Other essential worker [TEXT BOX]
- 07 I am not an essential worker [EXCLUSIVE]
**S1Q17.** Before the COVID-19 pandemic, how did you commute to work or school? Select all modes of transportation that you used at least once a week.

<table>
<thead>
<tr>
<th>Code</th>
<th>Mode of Transportation</th>
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<tbody>
<tr>
<td>01</td>
<td>Personal vehicle – driving alone</td>
</tr>
<tr>
<td>02</td>
<td>Carpooling or vanpooling</td>
</tr>
<tr>
<td>03</td>
<td>Bus</td>
</tr>
<tr>
<td>04</td>
<td>Metrorail</td>
</tr>
<tr>
<td>05</td>
<td>Commuter rail [MARC, VRE]</td>
</tr>
<tr>
<td>06</td>
<td>Taxi or ride-hailing service (Uber, Lyft, etc.)</td>
</tr>
<tr>
<td>07</td>
<td>Bicycle, including e-bikes</td>
</tr>
<tr>
<td>08</td>
<td>Walking (1/4 mile or more)</td>
</tr>
<tr>
<td>09</td>
<td>Telecommuting/work from home</td>
</tr>
<tr>
<td>10</td>
<td>Other (Specify) [TEXT BOX]</td>
</tr>
</tbody>
</table>

**ASK IF S1Q14 = 01,02,03 [MUL=10]**

**S1Q18.** During the COVID-19 pandemic, how are you commuting to work or school? Select all modes of transportation that you currently use at least once a week.

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</tr>
<tr>
<td>09</td>
<td>Telecommuting/work from home</td>
</tr>
<tr>
<td>10</td>
<td>Other (Specify) [TEXT BOX]</td>
</tr>
</tbody>
</table>

**ASK IF S1Q14 = 01,02,03 [MUL=10]**

**S1Q19.** How do you expect to commute to work or school one year after the COVID-19 pandemic is over? Select all modes of transportation that you expect to use at least once a week.

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<td>09</td>
<td>Telecommuting/work from home</td>
</tr>
<tr>
<td>10</td>
<td>Other (Specify) [TEXT BOX]</td>
</tr>
<tr>
<td>11</td>
<td>I don’t know or I don’t yet have guidance from my employer [EXCLUSIVE]</td>
</tr>
</tbody>
</table>

**ASK IF S1Q18 = 09**

**S1Q20.** If given the choice to return to a work location once the COVID-19 pandemic is over, would you prefer to:
| 01 | Return to your work location full-time |
| 02 | Telework full-time |
| 03 | Telework some days and commute to your work location some days |

**ASK IF S1Q20 = 03**

**S1Q21.** How often would you want to telework?

| 01 | 1 day |
| 02 | 2 days |
| 03 | 3-4 days |
| 04 | 5 or more days |

**DEALLOCIES**

**ASK ALL**

**S1Q22.** Since the beginning of the COVID-19 pandemic, how have your online shopping habits changed? (Please only consider items you order for delivery at your home, not curbside pick-up).

| 01 | My online ordering has increased a lot |
| 02 | My online ordering has increased a little |
| 03 | My online ordering is the same as before |
| 04 | My online ordering has decreased a little |
| 05 | My online ordering has decreased a lot |
| 06 | I have never ordered any items online |

**ASK ALL**

**S1Q23.** One year after the COVID-19 pandemic is over, what do you expect your online shopping habits to be like?

| 01 | I will probably go back to the online shopping habits that I had before the pandemic |
| 02 | I will probably continue with my current online shopping habits |

**STREET USE AND DESIGN**

**ASK ALL**

**S1Q24.** During the pandemic, street space and parking space has been used for expanded pedestrian access, restaurant seating, etc. One year after the COVID-19 pandemic is over, would you support the continued use of street space/parking space for these kinds of purposes?

| 01 | Yes |
| 02 | No |

**SECTION 2: OUR TRANSPORTATION FUTURE**

**TRANSPORTATION MODES**
**Voices of the Region Survey**

**ASK ALL**

**S2_INTRO1:**
We are interested in what you think are the best ways to improve our regional transportation system. The transportation system includes the regional transportation infrastructure including roads and highways, mass transit systems and bicycle and pedestrian routes.

We want to know how you would act or behave one year after the COVID-19 pandemic is over. For these questions, please think about all the ways in which you travel, not just to or from work.

**ASK ALL**

**[MUL=3]**

**[RANDOMIZE 01-06]**

**S2Q1.** Which of the following changes to the bus stop or bus station would make you more likely to take a bus?

I would be more likely to take the bus if the bus stop... (Choose up to 3 options)

<p>| | |</p>
<table>
<thead>
<tr>
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<tbody>
<tr>
<td>01</td>
<td>Had shelter with seats</td>
</tr>
<tr>
<td>02</td>
<td>Was cleaner</td>
</tr>
<tr>
<td>03</td>
<td>Had adequate lighting at night</td>
</tr>
<tr>
<td>04</td>
<td>Provided shade or shelter from sun/rain/snow</td>
</tr>
<tr>
<td>05</td>
<td>Was within walking or biking distance of my home</td>
</tr>
<tr>
<td>06</td>
<td>Displayed real-time bus information</td>
</tr>
<tr>
<td>07</td>
<td>Other (Specify) [TEXT BOX]</td>
</tr>
<tr>
<td>08</td>
<td>No change would make me more likely to take the bus [EXCLUSIVE]</td>
</tr>
</tbody>
</table>

**ASK ALL**

**[MUL=3]**

**[RANDOMIZE 01-08]**

**S2Q2.** Now please think about the trip aboard the bus. Which of the following improvements to the bus ride experience would make you more likely to take the bus?

I would be more likely to take the bus if... (Choose up to 3 options)

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<tbody>
<tr>
<td>01</td>
<td>Buses arrived on a reliable schedule</td>
</tr>
<tr>
<td>03</td>
<td>Buses traveled more quickly</td>
</tr>
<tr>
<td>04</td>
<td>Buses were less crowded</td>
</tr>
<tr>
<td>05</td>
<td>The fare was cheaper</td>
</tr>
<tr>
<td>06</td>
<td>I did not need to transfer</td>
</tr>
<tr>
<td>07</td>
<td>The bus had Wi-Fi service</td>
</tr>
<tr>
<td>08</td>
<td>Buses had level boarding for easy access for all</td>
</tr>
<tr>
<td>09</td>
<td>Other (Specify) [TEXT BOX]</td>
</tr>
<tr>
<td>10</td>
<td>No change would make me more likely to take the bus [EXCLUSIVE]</td>
</tr>
</tbody>
</table>

**ASK ALL**

**[MUL=3]**

**[RANDOMIZE 01-07]**

**S2Q3.** Which of the following improvements would make you more likely to take rail transit (Metrorail, commuter rail, other trains)?
I would be more likely to take rail transit if... (Choose up to 3 options)

01 Trains came more frequently
02 Waiting for the train was more comfortable
03 Waiting for the train felt safer
04 Trains were less crowded
05 The fare was cheaper
06 There was a shuttle or bus line to get me to the train station
07 Navigating the station was easier
08 Other (Specify) [TEXT BOX]
09 No change would make me more likely to take rail transit [EXCLUSIVE]

ASK ALL
[MUL=3]
[RANDOMIZE 01-06]

S2Q4. Which of the following improvements would make you more likely to walk, bike or take an e-powered or mobility device to the train station or bus stop?

I would be more likely to walk, bike, or use an e-powered or mobility device to the train or bus if...
(Choose up to 3 options)

01 My route to the train or bus was quicker or more direct
02 My route to the train or bus had adequate lighting
03 My route to the train or bus was more shaded
04 There were more bike lockers at the station
05 There were e-bikes or e-scooters available to get to and from the station
06 There were sidewalks and safe crossings all the way there
07 Other (Specify) [TEXT BOX]
08 No change would make me more likely to walk or bike to the train or bus [EXCLUSIVE]

ASK ALL

S2Q5. Electric scooters or E-scooters are scooters that you stand or sit on and are powered by an electric motor. Electric bikes or e-bikes are bicycles with a battery-powered “assist” that amplifies the pedaling effort and gives the rider a boost. These are available in some places as shared devices.

If they were available to you, would you consider using a shared e-scooter or e-bike to take short trips (less than one mile) to transit or other destinations?

01 Yes
02 No
03 Not sure

ASK ALL
[MUL=3]
[RANDOMIZE 01-07]

S2Q6. Which of the following improvements would make you more likely to use a bicycle?

I would be likely to bike more if... (Choose up to 3 options)
Voices of the Region Survey

01  I had access to a bike
02  There were bike lanes or trails near my home
03  Bicycle lanes were separated from vehicles by a barrier
04  There was safe bike parking at my destination
05  There was a shower or locker room at work/school
06  Vehicle speeds were lower
07  Bicycle lanes and routes were more direct and complete
08  Other (Specify) [TEXT BOX]
09  No change would make me more likely to bike [EXCLUSIVE]

**ASK ALL**

S2Q7. New technologies and services, such as ridesharing and ride hailing (such as Uber and Lyft), are changing the use of the street space next to the curb. Do you support providing ride-hailing zones for pick-up and drop-off on the street if it meant a reduction in parking availability?

01  Yes
02  No

**ASK ALL**

S2Q8. Do you support constructing more or wider sidewalks and bike lanes if it meant a reduction in parking availability?

01  Yes
02  No

**ASK ALL**

S2Q9. Where in the Washington Region do you think most future development should be encouraged? (Choose one)

01  In newer suburbs
02  In older suburbs
03  In existing core cities
04  In rural areas

**ASK ALL**

S2Q10. If you could live anywhere in the region, where would it be? (Choose one)

01  In newer suburbs
02  In older suburbs
03  In existing core cities
04  In rural areas

**ASK ALL**

S2Q11. How big a concern is traffic congestion to you personally?

01  It is a significant concern and it impacts the quality of my life
02  It is somewhat a concern and it impacts my life a little
03  It is a bit of a concern
04  It is not a concern because I have adjusted to it
05  It is not a concern because I don’t experience much congestion
S2Q12. To avoid congestion and make bus trips faster, would you support dedicating a travel lane for mostly bus use?

01 Yes
02 No

ASK ALL

S2Q13. To enable buses to travel in their own lane, would you support the removal of a lane of on-street parking?

01 Yes
02 No

SECTION 3: FUTURE FACTORS & EXTERNAL FORCES

CLIMATE CHANGE

ASK ALL

S3Q1. The climate is changing, causing more extreme weather, such as extended periods of high heat or extreme cold, more frequent and more intense storms, hurricanes and flooding. How much do you agree or disagree with the following statement?

Elected officials need to consider impacts of climate change when planning for transportation in the future.

01 Strongly agree
02 Somewhat agree
03 Neutral
04 Somewhat disagree
05 Strongly disagree

ASK ALL

S3Q2. How much do you agree or disagree that human actions contribute to at least some climate change?

01 Strongly agree
02 Somewhat agree
03 Neutral
04 Somewhat disagree
05 Strongly disagree

DRIVERLESS CARS

ASK ALL

S3Q4. How might the availability of driverless cars benefit you or others in the Washington region? (Choose up to 3 options)
01 Not needing to park (a driverless vehicle can drop me off and park itself)
02 Safer/reduced crashes
03 Being connected to Wi-Fi while in the vehicle
04 Doing other things in the vehicle instead of actively driving
05 Supporting travel for persons with disabilities
06 Better traffic flow/reduced congestion
07 Fewer vehicle emissions
08 Other (Specify) [TEXT BOX]
09 I do not expect any benefits [EXCLUSIVE]

ASK ALL
[MUL=3]
[RANDOMIZE 01-07]
S3Q5. What concerns, if any, do you have about driverless cars? (Choose up to 3 options)
01 Safety of other drivers
02 Safety of pedestrians and bicyclists
03 Cybersecurity concerns
04 Liability for accidents
05 Cost
06 They may not equally be available to everyone
07 May discourage travel options such as public transportation and biking
08 Other (Specify) [TEXT BOX]
09 No concerns [EXCLUSIVE]

EQUITY

ASK ALL
S3Q6. How well do you feel the region’s current transportation system meets your travel needs?
01 Very well
02 Somewhat well
03 Neither well nor poorly
04 Somewhat poorly
05 Very poorly

ASK ALL
[MUL=3]
[RANDOMIZE 01-08]
S3Q7. Do you experience any of the following barriers to getting where you need to go from where you live? (Choose up to 3)
01 Public transportation requires too many transfers
02 Public transportation does not come frequently enough
03 Public transportation does not get me to my destination on time
04 Public transportation is too expensive for me
05 I don’t feel safe crossing the street
06 It feels unsafe to walk/bike
07 I can’t afford tolls to avoid traffic congestion
08 There are no trails near my home or work
09 Other (Specify) [TEXT BOX]
10 I don’t experience any transportation barriers [EXCLUSIVE]

**ASK ALL**

**S3Q8.** How well do you feel your transportation needs and concerns are being addressed by decision makers?

01 Very well
02 Somewhat well
03 Neither well nor poorly
04 Somewhat poorly
05 Very poorly

**ASK ALL**

**[MUL=3]**

**[RANDOMIZE 01-07]**

**S3Q9.** I would be more likely to participate in public meetings about transportation if: (Choose up to 3)

01 There were a translator or materials in my language
02 I could call in to listen or speak
03 I could attend in person on nights or weekends
04 The meetings were held in my neighborhood
05 The meetings were held near public transportation
06 More people from my community attended
07 I could obtain information and provide feedback online
08 Other (Specify) [TEXT BOX]
09 No changes would make me more likely to participate [EXCLUSIVE]

**ASK ALL**

**S3Q10.** What transportation investments should we make today that future generations will thank us for tomorrow?

[TEXT BOX]

**DEMOGRAPHICS**

**ASK ALL**

**D_INTRO.** Lastly, we’d like to ask you some questions about yourself and your household. Your answers will be combined with responses from other residents for analysis.

**ASK ALL**

**D1.** Not counting yourself, how many adults age 18 or older live in your household?
RANGE 0-10 [NUMBER BOX]

**ASK ALL**

**D2.** How many children under the age of 18 live in your household?
RANGE 0-10 [NUMBER BOX]
**ASK ALL**

**D3.** Which of the following best describes your primary residence?

1. Single family detached home
2. Townhouse
3. Condo/apartment
4. Mobile/manufactured home
5. Other (Specify) [TEXT BOX]

**ASK ALL**

**D4.** Do you currently own or rent your residence?

1. Own
2. Rent
3. Other (Specify) [TEXT BOX]

**ASK ALL**

**D5.** In what year were you born?

RANGE 1917-2002 [NUMBER BOX]

**ASK ALL**

**D6.** What is your gender?

1. Male
2. Female
3. Transgender
4. Non-binary
5. Other (Specify) [TEXT BOX]

**ASK ALL**

**D7.** Which of the following best describes you? Please select all that apply.

1. White
2. Black or African American
3. American Indian or Alaska Native
4. Asian
5. Native Hawaiian or other Pacific Islander
6. Hispanic, Latino/a/x, Spanish origin
7. Other (Specify) [TEXT BOX]

**ASK ALL**

**D8.** What language do you MOSTLY speak at home?

1. English
2. Spanish
3. Other (Specify) [TEXT BOX]

**ASK ALL**

**D9.** What was your total household income from all sources in 2019 before taxes?
1. Less than $25,000  
2. $25,000 to 49,999  
3. $50,000 to 74,999  
4. $75,000 to 99,999  
5. $100,000 to 149,999  
6. $150,000 to 199,999  
7. $200,000 to 299,999  
8. $300,000 or more

**ASK ALL**

**D10.** Please select your highest level of education achieved.

1. Some high school  
2. High school or GED  
3. Some college or trade school  
4. Bachelor’s degree  
5. Master’s degree or higher

**ASK ALL**

**CLOSE.** Thank you for your participation in this important study! Your feedback will be used by local officials to plan the region’s transportation future.
Voices of the Region
Survey Results

National Capital Region
Transportation Planning Board

Agenda Item 9

February 17, 2021

Olivia Saucier, Survey Manager – ICF
Heather Driscoll, Survey Director – ICF
Randy ZuWallack, Senior Statistician – ICF
Survey Methodology

- Representative survey of the region
- Target of 2,000 completed surveys
- 200 in each of ten sub-areas
- Randomly-drawn address-based sample
- Three mailed contacts with web link included; $1 pre-incentive
- Achieved 2,407 completes
- Final response rate of 11.9%
- Margin of error of +/-2.5% at 95% confidence.
Survey Results
Changes in General Travel
**S1Q1.** *Since the beginning of the COVID-19 pandemic, how much have your daily travel habits changed?*

Two-thirds of respondents report their daily travel habits have changed a lot since the beginning of the COVID-19 pandemic.

(n = 2,407)
**Mode Usage Before the Pandemic**

**S1Q2/S1Q4/S1Q8.** Prior to the COVID-19 pandemic, how often on average did you drive or ride in a car/take public transportation/ride a bicycle?

**CAR USERS**

Prior to COVID, 81% of respondents used a car to travel to work at least three times a week

N = 2,407

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Car</th>
<th>Public Transportation</th>
<th>Bicycle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Three or more trips a day</td>
<td>23%</td>
<td>5%</td>
<td>0%</td>
</tr>
<tr>
<td>One or two trips a day</td>
<td>41%</td>
<td>12%</td>
<td>2%</td>
</tr>
<tr>
<td>Three or more trips a week, but not every day</td>
<td>17%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>One or two trips a week</td>
<td>11%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Several times a month</td>
<td>16%</td>
<td>13%</td>
<td>16%</td>
</tr>
<tr>
<td>Less than once a month</td>
<td>24%</td>
<td>17%</td>
<td>24%</td>
</tr>
<tr>
<td>I never used this form of transportation</td>
<td>32%</td>
<td>32%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Mode Changes Since the Beginning of the Pandemic

**S1Q3/S1Q5/S1Q7/S1Q9.** Since the beginning of the COVID-19 pandemic, how much has your car use/use of public transportation/walking/biking changed?
**S1Q6.** One year after the COVID-19 pandemic is over, which of these changes would make you more likely to use public transportation? (check all that apply)

- More frequent cleaning of buses or train cars
- More spacing between people on buses or train cars
- More frequent service
- Plastic barriers to prevent the spread of COVID-19
- Riding a bus with limit stops
- Other

Other responses include:
Available COVID-19 vaccine, mandatory mask-wearing and temperature checks, open windows and better ventilation

Non-frequent users pre-COVID (n = 1,714)  
Frequent users pre-COVID (n = 517)
S1Q10. Please think about your travel habits one year after the COVID-19 pandemic is over. Do you expect that your travel habits will return to your previous pattern before the pandemic?

38% of all respondents expect to have a change to their travel habits one-year after the pandemic.
## Expected Changes to Travel One Year Post-Pandemic

**S1Q11.** How do you expect your travel will be different once the pandemic is over? I expect I will... (Select all that apply)

<table>
<thead>
<tr>
<th>Travel Mode</th>
<th>LESS than before the pandemic</th>
<th>MORE than before the pandemic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drive or ride in cars</td>
<td>47%</td>
<td>34%</td>
</tr>
<tr>
<td>Use public transportation</td>
<td>38%</td>
<td>13%</td>
</tr>
<tr>
<td>Walk</td>
<td>3%</td>
<td>53%</td>
</tr>
<tr>
<td>Bike</td>
<td>3%</td>
<td>26%</td>
</tr>
</tbody>
</table>

*N = 834*
Mode usage for commuting at least 1/week: Before, during, after COVID

*S1Q17/S1Q18. Before/During the COVID-19 pandemic, how did you commute/are you commuting to work or school? Select all modes of transportation that you used/use at least once a week.
*S1Q19. How do you expect to commute to work or school one year after the COVID-19 pandemic is over? Select all modes of transportation that you expect to use at least once a week.

- **Personal vehicle**
  - Pre-Pandemic: 74%
  - During the pandemic: 46%
  - Plans for after the pandemic: 72%

- **Metrorail**
  - Pre-Pandemic: 24%
  - During the pandemic: 19%
  - Plans for after the pandemic: 16%

- **Telecommuting**
  - Pre-Pandemic: 15%
  - During the pandemic: 33%
  - Plans for after the pandemic: 60%

- **Walking (1/4 mile+)**
  - Pre-Pandemic: 15%
  - During the pandemic: 7%
  - Plans for after the pandemic: 13%

- **Bus**
  - Pre-Pandemic: 13%
  - During the pandemic: 12%
  - Plans for after the pandemic: 3%

- **Carpooling/vanpooling**
  - Pre-Pandemic: 8%
  - During the pandemic: 3%
  - Plans for after the pandemic: 6%

- **Taxi or ride-hailing service**
  - Pre-Pandemic: 6%
  - During the pandemic: 6%
  - Plans for after the pandemic: 2%

- **Bicycle and e-bikes**
  - Pre-Pandemic: 4%
  - During the pandemic: 3%
  - Plans for after the pandemic: 4%

- **Commuter rail [MARC, VRE]**
  - Pre-Pandemic: 4%
  - During the pandemic: 3%
  - Plans for after the pandemic: 7%

- **3% of respondents do not know what their plans are for after the pandemic**

n = 1,711
Preferences of Current Telecommuters

**S1Q20.** If given the choice to return to a work location once the COVID-19 pandemic is over, would you prefer to...?

**S1Q21.** How often would you want to telework?

- Return to your work location full-time
- Telework full-time
- Telework some days and commute to your work location some days

*(n = 1,073)*

---

**How often would you want to telework? (n = 685)**

- 8% 1 day
- 41% 2 days
- 49% 3-4 days
- 2% 5 days

*(n = 1,073)*
S1Q16. Are you considered an essential worker who is required to travel outside your home for a job in the following industries (check all that apply)?

- Government: 43%
- Other: 33%
- Health care: 15%
- Grocery store: 5%
- Public works: 4%

Of respondents self-reported as essential workers:
- Essential workers: 43%
- Non-essential workers: 57%
S1Q18. During the COVID-19 pandemic, how are you commuting to work or school? Select all modes of transportation that you currently use at least once a week.
**Online Shopping During the Pandemic**

**S1Q22.** Since the beginning of the COVID-19 pandemic, how have your online shopping habits changed? (Please only consider items you order for delivery at your home, not curbside pick-up).

**S1Q23.** One year after the COVID-19 pandemic is over, what do you expect your online shopping habits to be like?

70% of respondents indicated that their online ordering increased.

58% of respondents report that they are likely to continue with the current online shopping habits.

<table>
<thead>
<tr>
<th>Change in Online Ordering</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>4%</td>
</tr>
<tr>
<td>Less</td>
<td>4%</td>
</tr>
<tr>
<td>Same</td>
<td>23%</td>
</tr>
<tr>
<td>Increased a little</td>
<td>31%</td>
</tr>
<tr>
<td>Increased a lot</td>
<td>39%</td>
</tr>
</tbody>
</table>

Respondents who reported a change in the amount of online ordering during the pandemic (n = 2,407)
Improvements to the Transportation Infrastructure
S2Q1. Which of the following changes to the bus stop or bus station would make you more likely to take a bus? I would be more likely to take the bus if the bus stop... (Choose up to 3 options)

*Each respondent could select up to three options*

Non-regular transit user (n = 1,890) vs. Regular Transit User (n = 517)

- Displayed real-time bus information: 31% (Non-regular) vs. 27% (Regular)
- Provided shade or shelter from sun/rain/snow: 43% (Non-regular) vs. 40% (Regular)
- Was within walking or biking distance of my home: 25% (Non-regular) vs. 29% (Regular)
- Was cleaner: 22% (Non-regular) vs. 17% (Regular)
- Had adequate lighting at night: 27% (Non-regular) vs. 20% (Regular)
- Had shelter with seats: 15% (Non-regular) vs. 14% (Regular)
- Other: 5% (Non-regular) vs. 5% (Regular)
- No change would make me more likely to take the bus [EXCLUSIVE]: 23% (Non-regular) vs. 45% (Regular)

Other responses include: Better bus maps, better security or cameras, handicap accessibility.
Changes to Bus Ride - by Transit User Status

**S2Q2.** Now please think about the trip aboard the bus. Which of the following improvements to the bus ride experience would make you more likely to take the bus? I would be more likely to take the bus if... (Choose up to 3 options)

- Buses arrived on a reliable schedule
- Buses traveled more quickly
- Buses were less crowded
- I did not need to transfer
- The fare was cheaper
- The bus had Wi-Fi service
- Buses had level boarding for easy access for all
- Other
- No change would make me more likely to take the bus

Other responses include:
- More frequent service,
- Cleanliness,
- Better ventilation

<table>
<thead>
<tr>
<th>Non-regular transit user (n = 1,890)</th>
<th>Regular Transit User (n = 517)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buses arrived on a reliable schedule</td>
<td>35% 57%</td>
</tr>
<tr>
<td>Buses traveled more quickly</td>
<td>20% 34%</td>
</tr>
<tr>
<td>Buses were less crowded</td>
<td>19% 24%</td>
</tr>
<tr>
<td>I did not need to transfer</td>
<td>16% 23%</td>
</tr>
<tr>
<td>The fare was cheaper</td>
<td>16% 14%</td>
</tr>
<tr>
<td>The bus had Wi-Fi service</td>
<td>4% 5%</td>
</tr>
<tr>
<td>Buses had level boarding for easy access for all</td>
<td>4% 5%</td>
</tr>
<tr>
<td>Other</td>
<td>3% 6%</td>
</tr>
<tr>
<td>No change would make me more likely to take the bus</td>
<td>45% 22%</td>
</tr>
</tbody>
</table>
Changes to Rail transit – by Transit User Status

"Train" defined as Metrorail, commuter rail, other trains

S2Q3. Which of the following improvements would make you more likely to take rail transit (Metrorail, commuter rail, other trains)?
I would be more likely to take rail transit if... (Choose up to 3 options)

- Trains came more frequently
- The fare was cheaper
- Trains were less crowded
- There was a shuttle or bus line to get me to the train station
- Waiting for the train felt safer
- Waiting for the train was more comfortable
- Navigating the station was easier

Non-regular transit user (n = 1,890) | Regular transit user (n = 517)
---|---
Trains came more frequently | 33% 63%
The fare was cheaper | 33% 35%
Trains were less crowded | 29% 55%
There was a shuttle or bus line to get me to the train station | 22% 12%
Waiting for the train felt safer | 17% 20%
Waiting for the train was more comfortable | 13% 20%
Navigating the station was easier | 7% 7%
Other | 7% 8%
No change would make me more likely to take rail transit [EXCLUSIVE] | 31% 10%

Other responses include:
Cheaper parking, proximity of station, cleanliness

"Train" defined as Metrorail, commuter rail, other trains
Changes to Encourage Walking, Biking to Transit - by Age

S2Q4. Which of the following improvements would make you more likely to walk, bike or take an e-powered or mobility device to the train station or bus stop? I would be more likely to walk, bike, or use an e-powered or mobility device to the train or bus if… (Choose up to 3 options)

- Safe crossings the way there
- Route was quicker or more direct
- E-bikes/e-scooters available to get to/from the station
- My route to the train/bus had adequate lighting
- There were more bike lockers at the station
- My route to the train or bus was more shaded
- Other

Other responses include: Bike lanes, more local transit options, safety

- No change would make me more likely to walk or bike to the train or bus [EXCLUSIVE]
**Changes to Encourage Bicycling - by Age**

**S2Q6.** Which of the following improvements would make you more likely to use a bicycle? I would be likely to bike more if... (Choose up to 3 options)

**Other responses include:** Physically unable, better road conditions

- **I had access to a bike**
- **There were bike lanes or trails near my home**
- **Bicycle lanes were separated from vehicles by a barrier**
- **There was safe bike parking at my destination**
- **There was a shower or locker room at work/school**
- **Vehicle speeds were lower**
- **Bicycle lanes and routes were more direct and complete**
- **Other**
- **No change would make me more likely to walk or bike to the train or bus [EXCLUSIVE]**

**Under 30 (n = 206)**
- I had access to a bike: 24%
- There were bike lanes or trails near my home: 36%
- Bicycle lanes were separated from vehicles by a barrier: 45%
- There was safe bike parking at my destination: 27%
- There was a shower or locker room at work/school: 6%
- Vehicle speeds were lower: 9%
- Bicycle lanes and routes were more direct and complete: 46%
- Other: 2%

**31-64 (n = 1,563)**
- I had access to a bike: 10%
- There were bike lanes or trails near my home: 34%
- Bicycle lanes were separated from vehicles by a barrier: 33%
- There was safe bike parking at my destination: 17%
- There was a shower or locker room at work/school: 10%
- Vehicle speeds were lower: 7%
- Bicycle lanes and routes were more direct and complete: 34%
- Other: 2%

**Over 65 (n = 600)**
- I had access to a bike: 4%
- There were bike lanes or trails near my home: 31%
- Bicycle lanes were separated from vehicles by a barrier: 32%
- There was safe bike parking at my destination: 17%
- There was a shower or locker room at work/school: 8%
- Vehicle speeds were lower: 7%
- Bicycle lanes and routes were more direct and complete: 34%
- Other: 2%

**24% 36% 45%**
Broader Opinion Questions
Support for Sidewalk and Street Uses

S1Q24. One year after the COVID-19 pandemic is over, would you support the continued use of street space/parking space for these kinds of purposes?
S2Q8. Do you support constructing more or wider sidewalks and bike lanes if it meant a reduction in parking availability?
S2Q7. Do you support providing ride-hailing zones for pick-up and drop-off on the street if it meant a reduction in parking availability?
S2Q12. To avoid congestion and make bus trips faster, would you support dedicating a travel lane for mostly bus use?
S2Q13. To enable buses to travel in their own lane, would you support the removal of a lane of on-street parking?
Impact of Traffic Congestion on Quality of Life

**S2Q11. How big a concern is traffic congestion to you personally?**

<table>
<thead>
<tr>
<th>Core (n = 721)</th>
<th>Inner Suburbs (n = 741)</th>
<th>Outer Suburbs (n = 944)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Significant concern and it impacts the quality of my life</td>
<td>44%</td>
<td>46%</td>
</tr>
<tr>
<td>Somewhat a concern and it impacts my life a little</td>
<td>25%</td>
<td>22%</td>
</tr>
<tr>
<td>Bit of a concern</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Not a concern because I have adjusted to it</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Not a concern because I don't experience much congestion</td>
<td>10%</td>
<td>9%</td>
</tr>
</tbody>
</table>
**S3Q2.** How much do you agree or disagree that human actions contribute to at least some climate change?

**S3Q1.** How much do you agree or disagree with the following statement? Elected officials need to consider impacts of climate change when planning for transportation in the future.
**S3Q4. How might the availability of driverless cars benefit you or others in the Washington region? (Choose up to 3 options)**

- Better traffic flow/reduced congestion: 38%
- Not needing to park (a driverless vehicle can drop me off and park itself): 38%
- Safer/reduced crashes: 33%
- Supporting travel for persons with disabilities: 32%
- Fewer vehicle emissions: 27%
- Doing other things in the vehicle instead of actively driving: 24%
- Being connected to Wifi while in the vehicle: 6%
- Other: 2%
- I do not expect any benefits: 24%

33% of low-income respondents (n = 223) reported that they do not expect any benefits compared to 22% of non-low-income respondents.

N = 2,407, Respondents identified up to 3 options
S3Q5. What concerns, if any, do you have about driverless cars? (Choose up to 3 options)

- Safety of pedestrians and bicyclists: 52%
- Safety of other drivers: 49%
- Liability for accidents: 45%
- Cybersecurity concerns: 33%
- Cost: 33%
- They may not equally be available to everyone: 25%
- May discourage travel options such as public transportation and biking: 13%
- Other: 3%
- No concerns: 6%

17% of low-income respondents (n = 246) have no concerns compared to 5% of not low-income respondents (n =5,541)

N = 2,407, Respondents identified up to 3 options
Transportation Equity
**S3Q6. How well do you feel the region’s current transportation system meets your travel needs?**

<table>
<thead>
<tr>
<th>Region</th>
<th>MEETING NEEDS</th>
<th>NOT MEETING NEEDS</th>
<th>NEUTRAL</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core (n = 721)</td>
<td>75%</td>
<td>10%</td>
<td>15%</td>
<td>100%</td>
</tr>
<tr>
<td>Inner Suburbs (n = 740)</td>
<td>55%</td>
<td>20%</td>
<td>25%</td>
<td>100%</td>
</tr>
<tr>
<td>Outer Suburbs (n = 944)</td>
<td>38%</td>
<td>33%</td>
<td>30%</td>
<td>100%</td>
</tr>
<tr>
<td>Region-wide (n=2,407)</td>
<td>55%</td>
<td>21%</td>
<td>24%</td>
<td>100%</td>
</tr>
</tbody>
</table>
S3Q6. How well do you feel the region’s current transportation system meets your travel needs?

Low-income respondents feel that the current transportation system meets their travel needs
S3Q6. How well do you feel the region’s current transportation system meets your travel needs?

**Meeting Needs**
- Very well or Somewhat well:
  - Under 30 (n = 206): 72%
  - 31-64 (n = 1,563): 53%
  - 65+ (n = 600): 44%

**Not Meeting Needs**
- Somewhat poorly or Very poorly:
  - Under 30 (n = 206): 12%
  - 31-64 (n = 1,563): 12%
  - 65+ (n = 600): 21%

**Neutral**
- 24% for each age group.
### Experience with Transportation Barriers

**S3Q7. Do you experience any of the following barriers to getting where you need to go from where you live? (Choose up to 3)**

<table>
<thead>
<tr>
<th>Barrier</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public transportation does not come frequently enough</td>
<td>28%</td>
</tr>
<tr>
<td>Public transportation requires too many transfers</td>
<td>23%</td>
</tr>
<tr>
<td>Public transportation does not get me to my destination on time</td>
<td>21%</td>
</tr>
<tr>
<td>It feels unsafe to walk/bike</td>
<td>19%</td>
</tr>
<tr>
<td>I can’t afford tolls to avoid traffic congestion</td>
<td>15%</td>
</tr>
<tr>
<td>There are no trails near my home or work</td>
<td>14%</td>
</tr>
<tr>
<td>Public transportation is too expensive for me</td>
<td>11%</td>
</tr>
<tr>
<td>I don’t feel safe crossing the street</td>
<td>11%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
<tr>
<td>I don’t experience any transportation barriers [EXCLUSIVE]</td>
<td>33%</td>
</tr>
</tbody>
</table>

17% of not low-income respondents (n = 3,680) expressed that the cost of tolls was a barrier to getting where they need to compare to 5% of low-income respondents (n = 170).
S3Q8. How well do you feel your transportation needs and concerns are being addressed by decision makers?

Needs Addressed by Decision-Makers – by Income

Low-income (n = 102)  Not low-income (n = 2,108)
Participation in Public Meetings

**S3Q9.** I would be more likely to participate in public meetings about transportation if: (Choose up to 3)

- I could obtain information and provide feedback online: 45%
- I could call in to listen or speak: 35%
- The meetings were held in my neighborhood: 25%
- I could attend in person on nights or weekends: 15%
- More people from my community attended: 12%
- The meetings were held near public transportation: 7%
- There were a translator or materials in my language: 1%
- Other: 4%
- No changes would make me more likely to participate [EXCLUSIVE]: 31%

N = 2,407, Respondents identified up to 3 options
The survey included a broad open-ended question which asked respondents to consider:

*What transportation investments should we make today that future generations will thank us for tomorrow?*
S3Q10. What transportation investments should we make today that future generations will thank us for tomorrow? [Top primary and secondary codes]
S3Q10. What transportation investments should we make today that future generations will thank us for tomorrow? [Top secondary Codes and illustrative quotes]
Thank you
Appendix
Respondent Age Distribution

**D5. In what year were you born?**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Survey</th>
<th>ACS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 30</td>
<td>20%</td>
<td>21%</td>
</tr>
<tr>
<td>31-40</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>41-50</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>51-60</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>61-70</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>71-80</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>80+</td>
<td>2%</td>
<td>4%</td>
</tr>
</tbody>
</table>
D7. Which of the following best describes you? Please select all that apply.
D9. What was your total household income from all sources in 2019 before taxes?
S1Q13. Before the COVID-19 pandemic, what was your employment situation? (Select all that apply)
S1Q14. What is your current employment situation during the COVID-19 pandemic? (Select all that apply)

Employment Before and During Pandemic

N = 2,407

- Working full time: Pre-Pandemic 71%, During the pandemic 64%
- Working part time: Pre-Pandemic 8%, During the pandemic 9%
- Student: Pre-Pandemic 5%, During the pandemic 6%
- Stay at home parent or caretaker: Pre-Pandemic 3%, During the pandemic 4%
- Unemployed or furloughed: Pre-Pandemic 3%, During the pandemic 7%
- Retired: Pre-Pandemic 16%, During the pandemic 17%
- Other: Pre-Pandemic 1%, During the pandemic 2%
Changes to Bus Stop or Station - by Age

**S2Q1.** Which of the following changes to the bus stop or bus station would make you more likely to take a bus? I would be more likely to take the bus if the bus stop... (Choose up to 3 options)
Elected Officials Must Consider Climate Change – by Age

**S3Q1.** How much do you agree or disagree with the following statement? Elected officials need to consider impacts of climate change when planning for transportation in the future.

- **DISAGREE**
  - Strongly or Somewhat Disagree: 2% (Under 30), 6% (31-64), 13% (65+)

- **NEUTRAL**
  - 8% (Under 30), 10% (31-64), 6% (65+)

- **AGREE**
  - Strongly or Somewhat Agree: 92% (Under 30), 82% (31-64), 82% (65+)