

NVTA TransAction 2021 Update:

Tracking Changes in Transportation Attitudes and Priorities

January 2022





Methodology



AUDIENCE Residents 18 years or older within jurisdiction of

Northern Virginia Transportation Authority

n=611



DATES December 6-21, 2021



MODE Online Survey



LENGTH 14 minutes



GEOGRAPHY Northern Virginia

Arlington County, Fairfax County, Loudoun County,

Prince William County and the Cities of Alexandria, Fairfax,

Falls Church, Manassas, and Manassas Park

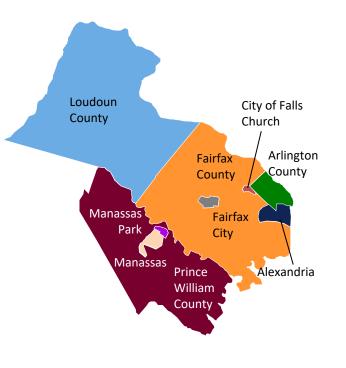


DATA WEIGHTING 2021 data weighted by ethnicity

2019 data weighted by ethnicity

2016 data weighted by gender and ethnicity

2015 data weighted by ethnicity





Methodology: Reporting Notes

- Survey Respondent Selection
 - Scientific study using an opt-in online panel.
 - Respondents must be age 18+ and residents of Northern Virginia, more specifically, residents of Arlington County, Fairfax County, Loudoun County,
 Prince William County, Alexandria, Fairfax City, City of Falls Church, Manassas, and Manassas Park.
 - We aim for an overall representation of regional demographics based on age, gender, and race according to the US Census. We also aim for a
 proportionate sample that represents each county/city by population size according to the US Census. For the most part we use sample quotas to hit
 these demographic targets.
- Confidence Interval and Margin of Error
 - All sample surveys and polls, whether or not they use probability sampling, are subject to multiple sources of error which are most often not possible to quantify or estimate. Online opt-in panels such as the one used for this study do not use probability sampling and accordingly the strict calculation of sampling error is not typically done. In the hypothetical case of a perfectly random sample and no response or measurement errors, a sample of this size (n=611) would produce a margin of error of ± 3.95% at a 95% confidence interval. Margins of error for subgroups would be higher.
- Ethnicity clarification
 - Black, White, Asian refer to Non-Hispanic Black/White/Asians.
- Statistical Testing Notations
 - Indicates statistically significant differences between 2019 and 2021 (p<.05). When appropriate, the report indicates these differences using green, red, and blue color coding wherein green = an increase or positive change; red = decrease or negative change; blue = may be construed as either positive or negative/or just a change that might be of interest.
- () Numbers in parenthesis are of interest but are not statistically significant at p<.05 level. When shown these numbers are color coded in the same way as described in prior bullet.
- Some totals may not add to 100% and aggregation of the data may vary slightly due to rounding error.



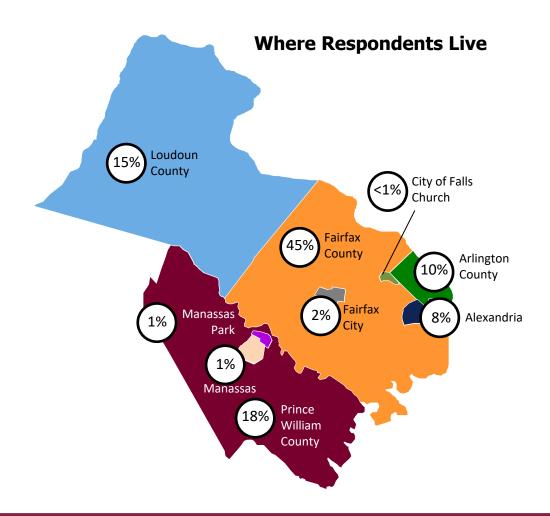
Methodology: Reporting Notes



- Some of the differences in 2021 findings are potentially skewed by the pandemic
- It is important to capture a read on the region during the pandemic
 - Highlights the impact of the pandemic
 - Provides a pandemic benchmark for future iterations



Resident Profile



Country/City of Freedom and	2015	2016	2010	2021
County/City of Employment	2015	2016	2019	2021
Fairfax County	37%	36%	35%	38%
District of Columbia	18%	12%	11%	6%
Arlington County	11%	11%	12%	14%
Loudoun County	8%	13%	12%	13%
Alexandria	7%	9%	9%	8%
Prince William County	6%	8%	12%	11%
Manassas	4%	2%	2%	2%
Fairfax City	2%	2%	2%	3%
City of Falls Church	1%	1%	1%	1%
Manassas Park	<1%	<1%	1%	<1%
Other county in Virginia	1%	1%	2%	1%
Other county in Maryland	3%	2%	1%	1%
Other	1%	3%	2%	2%
Years of Residency				
Less than 1 year	3%	2%	3%	5%
1 to 5 years	19%	16%	17%	22%
6 to 10 years	14%	12%	14%	12%
11 to 15 years	12%	14%	11%	9%
More than 15 years	51%	56%	55%	52%
Own/Rent Home				
Own	65%	70%	64%	63%
Rent	32%	26%	31%	31%
Neither	2%	3%	3%	3%
Decline	1%	1%	2%	3%





- This most recent wave of the NVTA's Transportation survey shows some of the ways the pandemic has impacted people's lives when it comes to transportation.
 - Online shopping continues to grow as many people opt to stay at home.
 - There has been an increase in remote workers and an expectation that most will continue to work from home (at least occasionally) once the pandemic is over.
 - There has been a decrease in the usage of public transportation and the strong majority drive when traveling to a non-home worksite.



- Quality of life concerns show some changes that are likely due to the pandemic and increased numbers of residents working remotely.
 - Improving the affordability housing and living is the greatest concern in 2021 replacing traffic and congestion.
 - The impact of traffic and congestion remains the number 1 transportation-related concern but continues to soften in terms of its impact of the quality of life for local residents.
- Virtually all agree (89%) investing in regional transportation is an important priority.
- The importance of the number and variety of transportation options continues to grow (and has doubled in importance since the benchmark wave in 2015).



- The region continues to build positive perceptions on addressing areas that impact
 quality of life...traffic flow and congestion, providing access to a range of transportation
 options, convenient access, and transportation infrastructure.
- Safety, durability/longevity, and affordability are the three most important priorities. Performance has improved on affordability, but there is still opportunity to close the gap between importance and performance.
 - Safety and durability/longevity are new/newly worded attributes for 2021, so a historical comparison to past performance is not available.
 - The gap between importance and performance, however, suggests there is room to improve perceptions in those areas.
- When thinking of new improvements to the region, respondents prioritize expansion of Metro rail & bus service, integrating the latest technologies, and new/improved highways as the most important improvements.



- Half of respondents recall seeing, hearing, or reading news about regional transportation issues/actions.
 - Recall is largely positive with a 2:1 ratio of positive to negative.
 - Positive actions most commonly relate to developments in the Metro system (expanded lines, new equipment etc.) and roadwork projects designed to widen roads and improve traffic flow.
 - Negatives most often center on Metro equipment issues and lack of funding.
- TV and social media are the most common sources of information. Both sources saw increased growth from 2019.
 - Community meetings and websites, while less commonly used, also saw an uptick in usage from 2019.

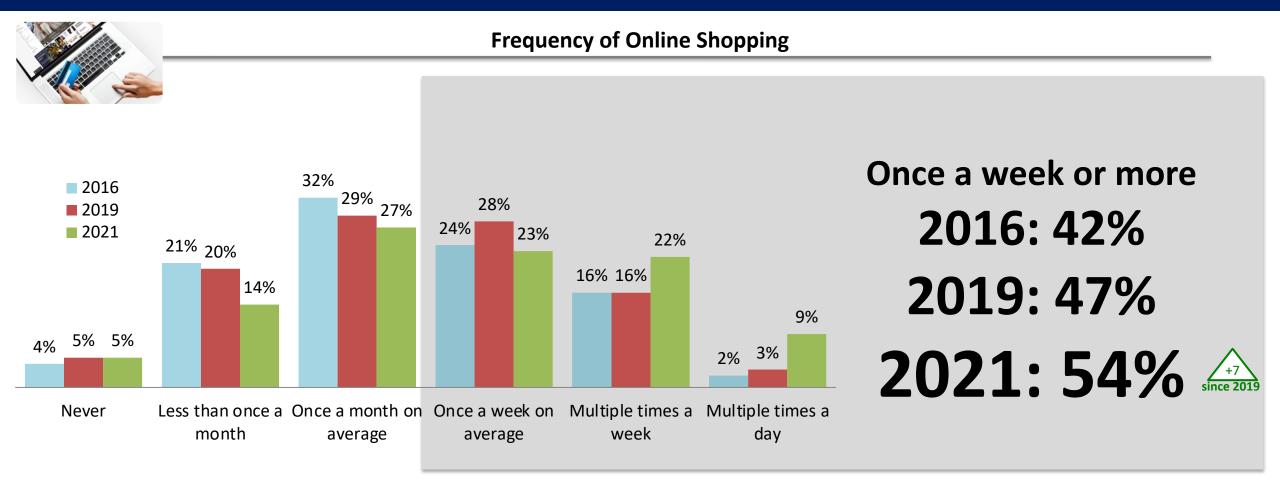


- Awareness of NVTA and TransAction continues to grow and saw a sizable increase in name recognition compared to 2019.
 - Overall familiarity is limited, signaling an opportunity to further educate residents on the role NVTA and TransAction plays when it comes to regional transportation.
- The overall region and NVTA (among those aware of the organization) both saw improvements in their performance on planning and implementing transportation solutions.
 - For the first time since tracking began, recall of recent transportation news is over 50% positive –
 meaning residents are reading, hearing and seeing positive news now more than ever.
 - The region and NVTA also saw their highest scores to date on planning and implementing transportation solutions in the region with half or more scoring the region's performance as Good or Excellent.



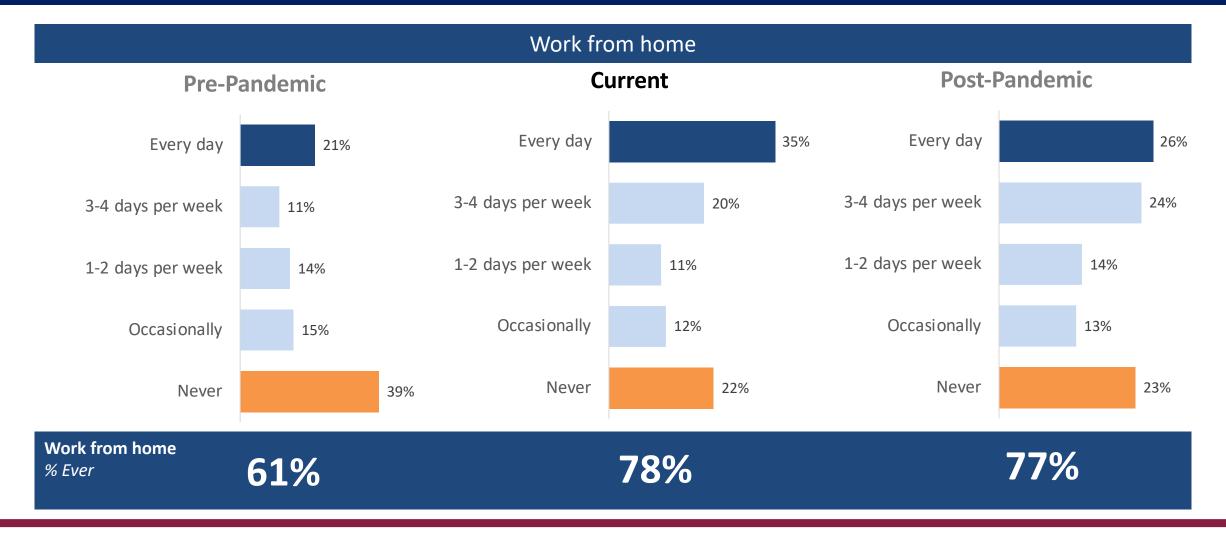


Over half (54%) of NoVa residents shop online at least once a week, and almost one third (31%) shop online multiple times a week.





The pandemic saw an increase in remote workers, and many expect to continue to work remotely in some capacity after the pandemic.

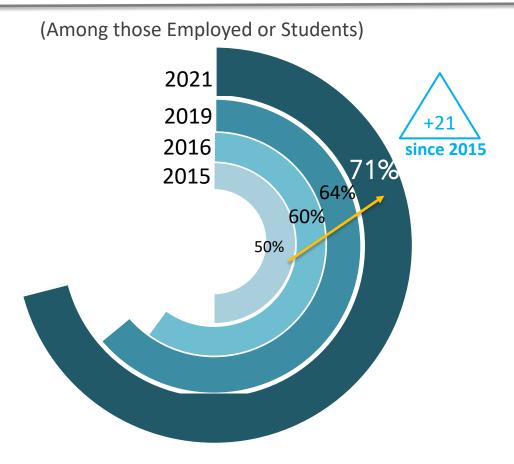




The increase in remote working can also be observed in the increase in the percentage of residents work live/work in the same area.

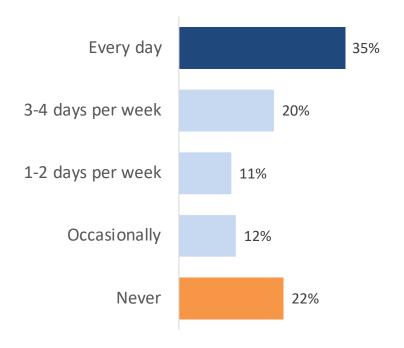
Live and Work in Same City/County



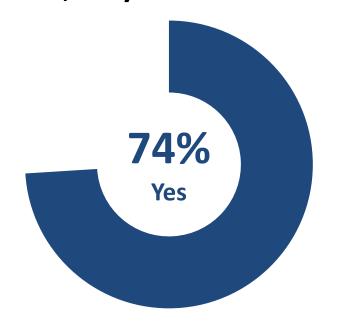


Most residents drive when traveling to a non-home worksite.

How often do you work from home?

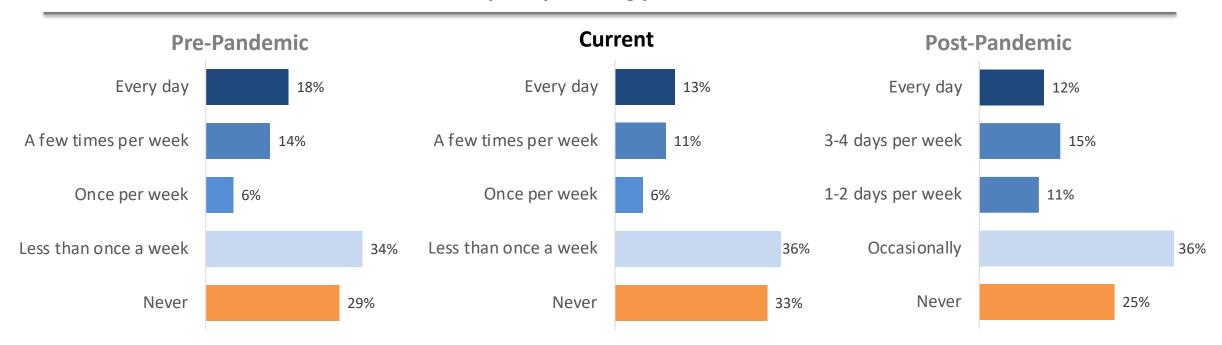


When you go to a non-home worksite, do you drive to work?



The frequency of use of public transit declined and residents do not expect usage to rebound to pre-pandemic levels at this time.

Frequency of using public transit



Before the pandemic, how often did you use public transit

How often do you use public transit?

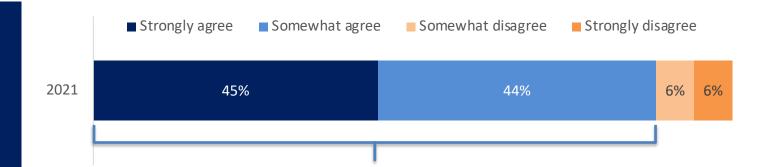
How often do you plan to use public transit once the pandemic ends?



Investing in regional transportation is an important priority.

To what extent do you agree with the statement:

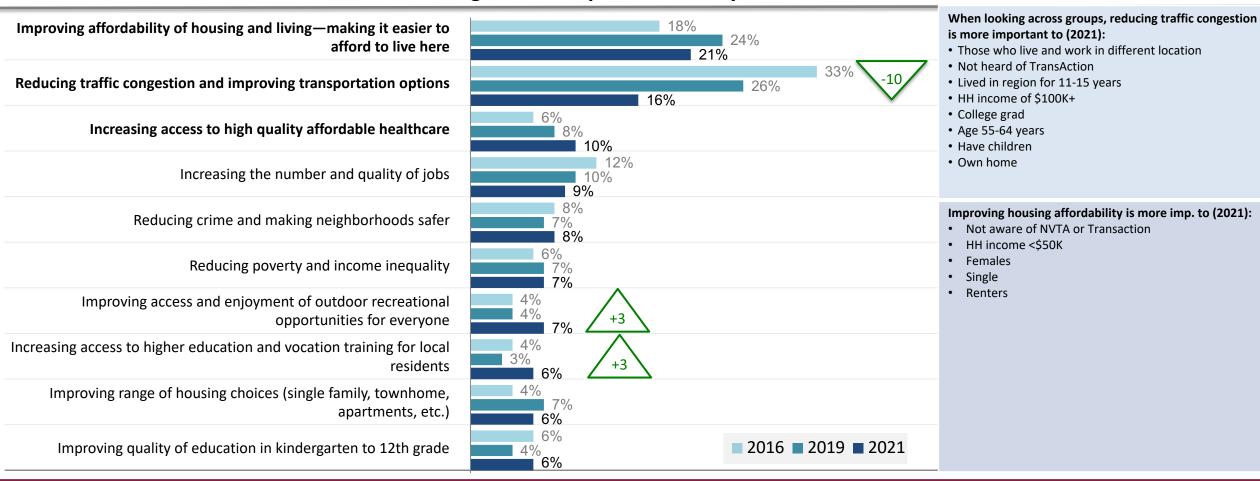
Investing in the regional transportation system is an important priority



89% Agree

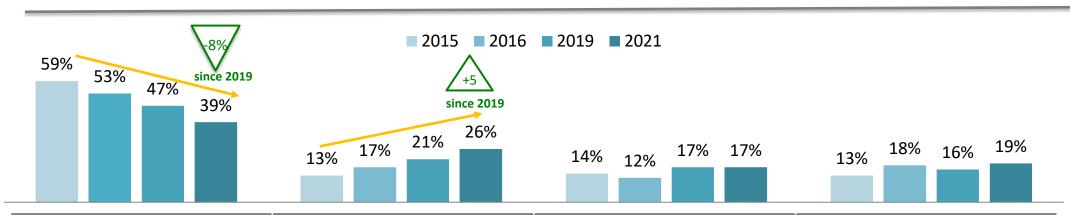
Quality of life concerns show some changes that are likely due in part to the pandemic and increased numbers of residents working remotely.

Significant Impact on Quality of Life



Congestion continues to decline but remains the most significant issue while importance of transportation options continues to grow.

Biggest Impact on One's Quality of Life





Traffic flow and congestion

Transportation Options



The number and variety of transportation options available for me to get around

Convenient Access



Convenient access to work, shopping, restaurants, schools, services

Transportation Infrastructure



The maintenance and quality of the transportation infrastructure (including roads, bridges, rail and trails)

Congestion matters most to those older residents and those who drive to work while transportation options matter most to younger residents, Hispanics, and those with children.

Biggest Impact on Your Quality of Life – Subgroup Analysis







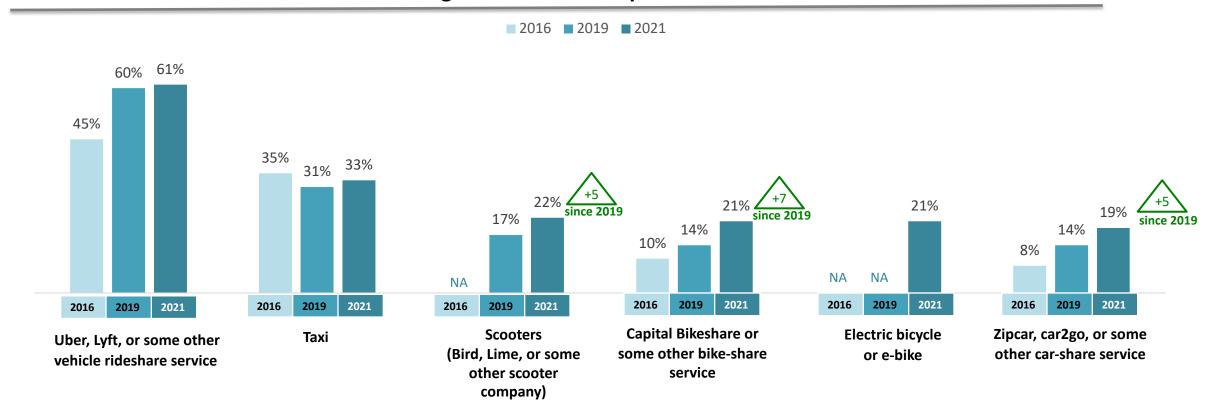


Traffic Flow and Congestion (39%)	Transportation Options (26%)	Convenient Access (17%)	Transportation Infrastructure (19%)
 50% Ages 65+ 45% White 45% Has not heard of TransAction 44% No children at home 43% Drive to work 	 40% Aware of TransAction 35% 18-24 years old 34% Hispanic 34% Lived in region 11-15 years 32% Children at home 	 26% High school education or less 25% Ages 18-24 23% HHI <\$50k 22% Single 21% Divorced 20% Not aware of NVTA 	 26% Lived in region for 1-5 years 25% Aware of TransAction 23% Male



Residents' use of some car services (Uber/Taxi) is flattening while Scooter, Bikeshare and Zipcar have increased.

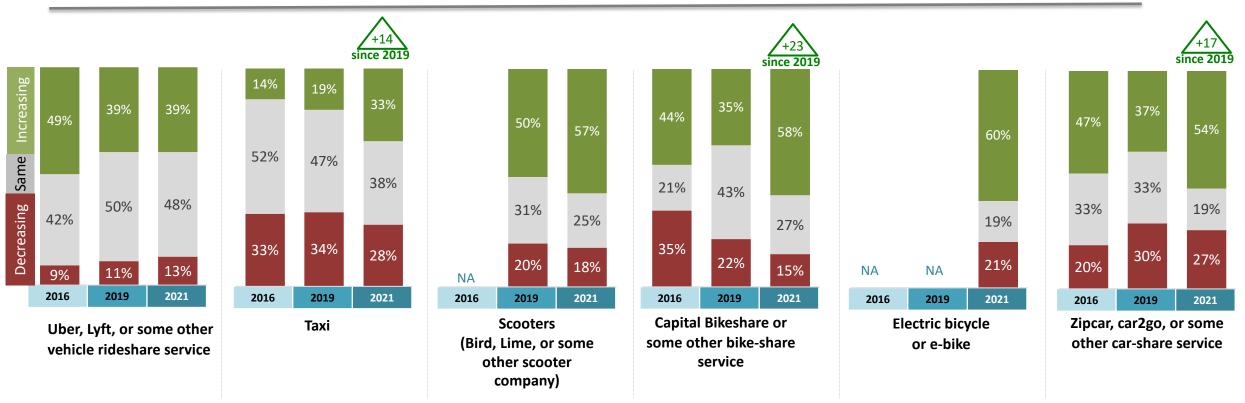
Usage of Car Ownership Alternatives

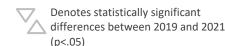




Increases in usage are growing at a faster rate in 2021 for car-share, bike-share, and taxi service.

Reported Change in Usage of Car Ownership Alternatives

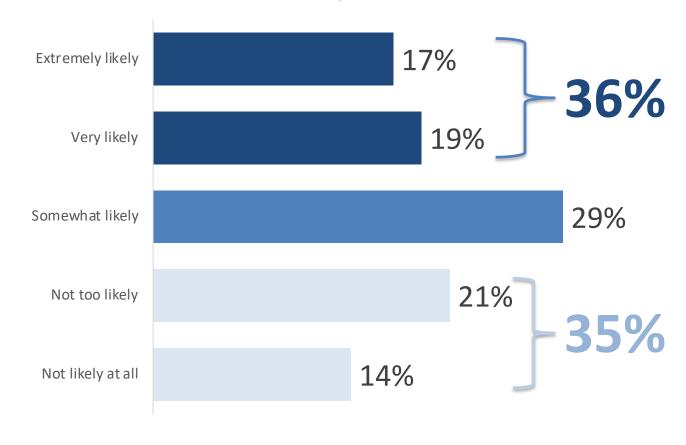






Over one third (36%) would consider getting an electric vehicle.

Likelihood to Purchase/Lease Electric Vehicle



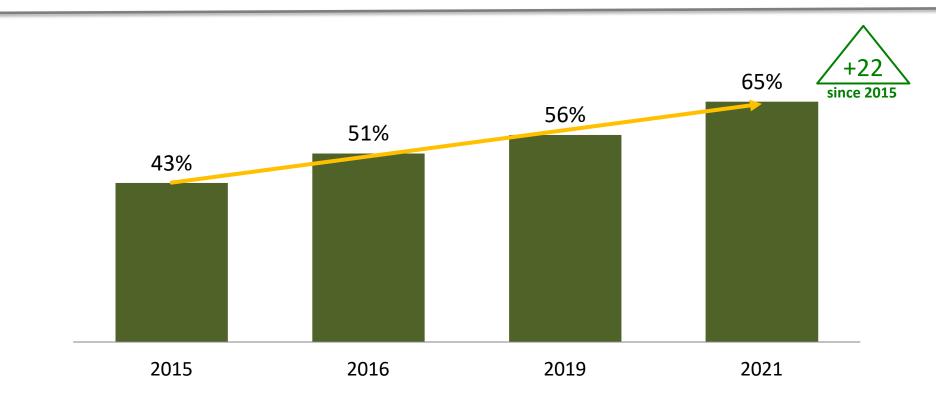


Transportation REGIONAL PRIORITIES AND VALUES

The region continues to show increased perceptions of doing a "Good Job" on addressing top priorities.

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

(Total Respondents)

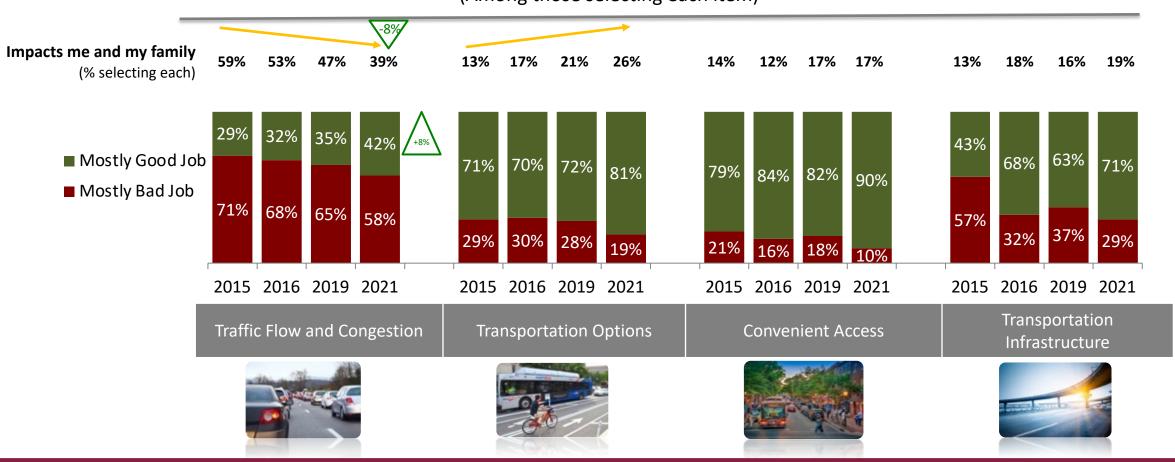


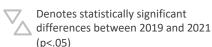
Q560. Currently, when it comes to improving traffic flow and reducing congestion, do you feel that the region is doing a good job or a bad job?

Increases in doing a "Good Job" observed across all four areas. Traffic continues to have a declining impact while transportation options grow.

Region is Doing A...

(Among those selecting each item)









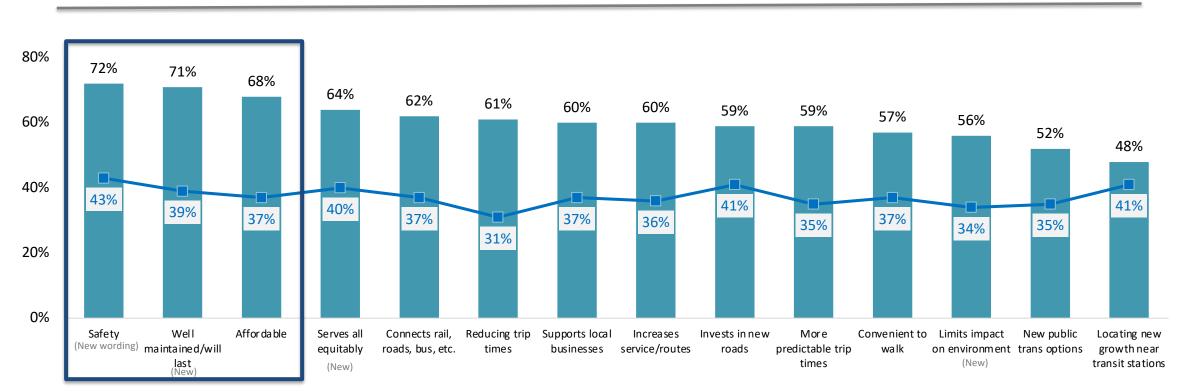
What priorities are most important and how well does the region perform?

Short Label	Full Label
Connects rail, roads, bus, etc.	Providing a transportation system that connects rail, roads, bus, biking and pedestrians
Affordable	Making sure that our transportation system is affordable
Supports local businesses	Building a transportation system that supports local businesses and the regional economy
Reducing trip times	Reducing trip times
More predictable trip times	More predictable trip times
New public trans options	Providing new public transportation options
Invests in new roads	Investing in new highways and road improvements
Locating new growth near transit stations	Locating new growth in the region near transit stations
Increases service/routes	Increasing existing service and routes of public transit systems
Convenient to walk	Making it convenient to walk or bike to neighborhood stores, businesses, and schools
Safety	NEW WORDING for 2021: Making sure our transportation system is safe OLD WORDING: Making sure our transportation system takes advantage of the latest technologies to make it more efficient and safer
Well maintained/Will last	Building a transportation system that is well maintained and will be around for a long time (added in 2021)
Limits impact on environment	Limiting the transportation system's impact on the environment (added in 2021)
Serves all equitably	Building a transportation system that serves all members of the community equitably (added in 2021)



Making sure our transportation system is safe, well-maintained/will be around a long time, and affordable are the most important priorities. There is room to improve performance on most measures.

2021: Importance & Performance of Regional Transportation Priorities*



Note – Shortened labels shown for priorities

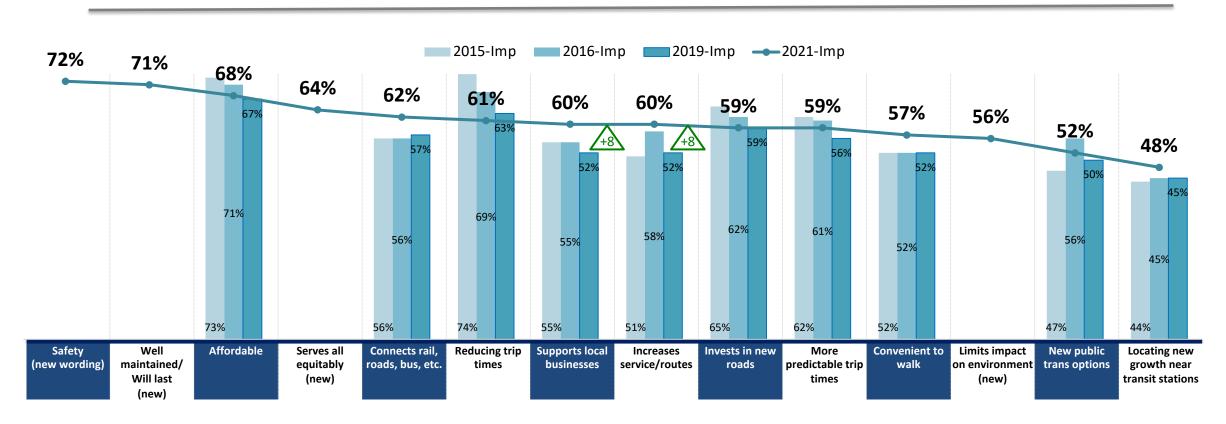
2021 - Important ——2021-Performance

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



Supporting local business and Increasing existing service and routes of public transit systems have grown in their importance since 2019. The importance of other priorities remain comparable to the previous wave.

Importance Over Time of Regional Transportation Priorities*

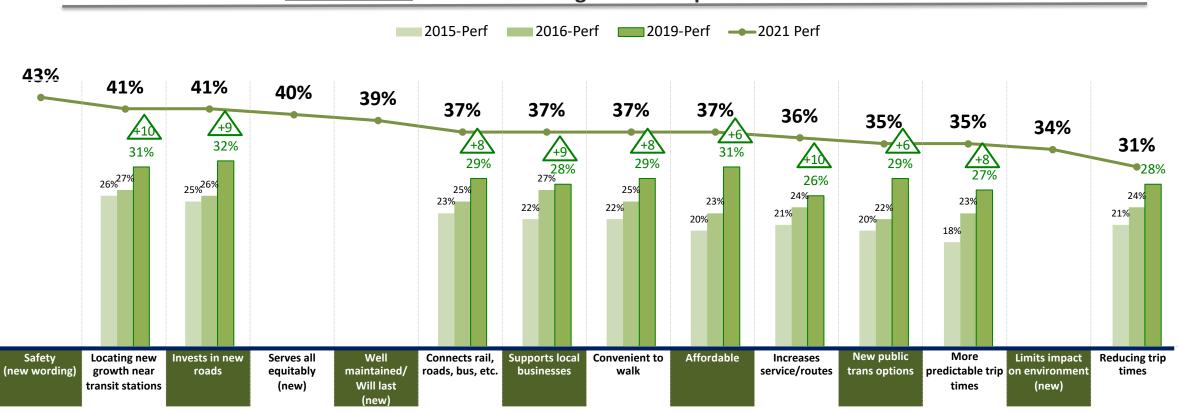


*% rating each 8-10 on 10-pt scale

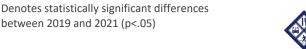


Performance ratings are showing a growth trend on most tracked priorities.

Performance Over Time in Regional Transportation Priorities*



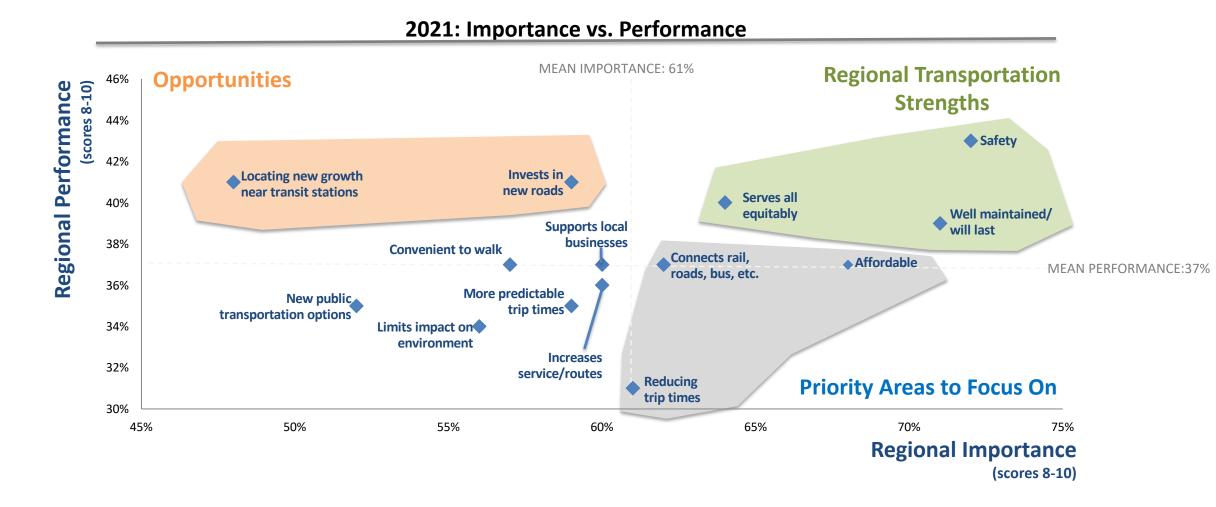
*% rating each 8-10 on 10-pt scale



between 2019 and 2021 (p<.05)

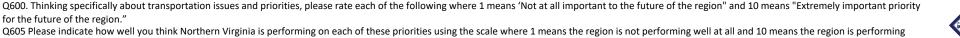


Safety, equitable access, and longevity are current perceptual equities. The priority areas to strengthen performance relate to affordability, connection, and reduced trip times.





extremely well



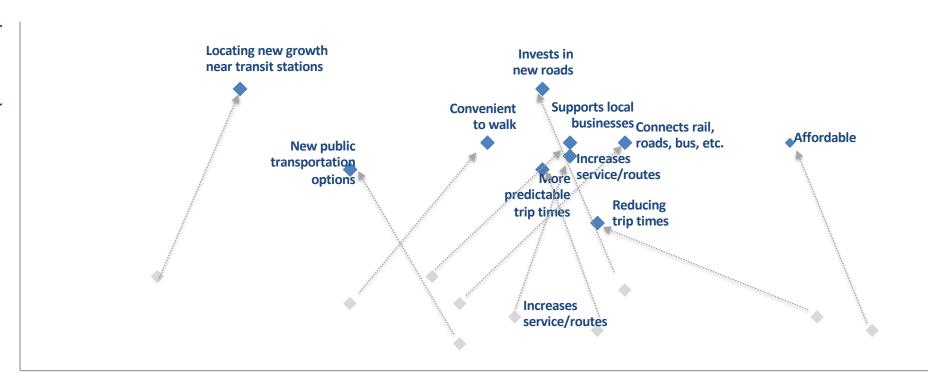




Most of the movement in priorities comes from shifts in improved performance as compared to the 2016 benchmark.

2016 vs. 2021: Importance vs. Performance

Regional Performance (scores 8-10)



Regional Importance

(scores 8-10)

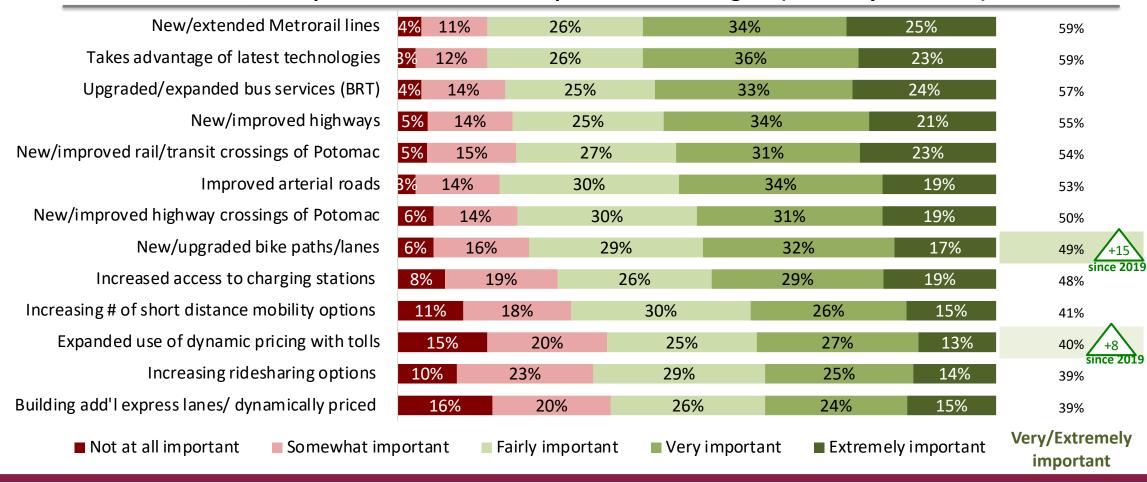


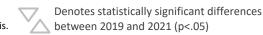
extremely well



The approaches that are perceived as most important to the region include new/extended metro rail lines, using the latest tech and upgrading BRT.

2021: Importance of Potential Improvements to Region (sorted by T2B score)



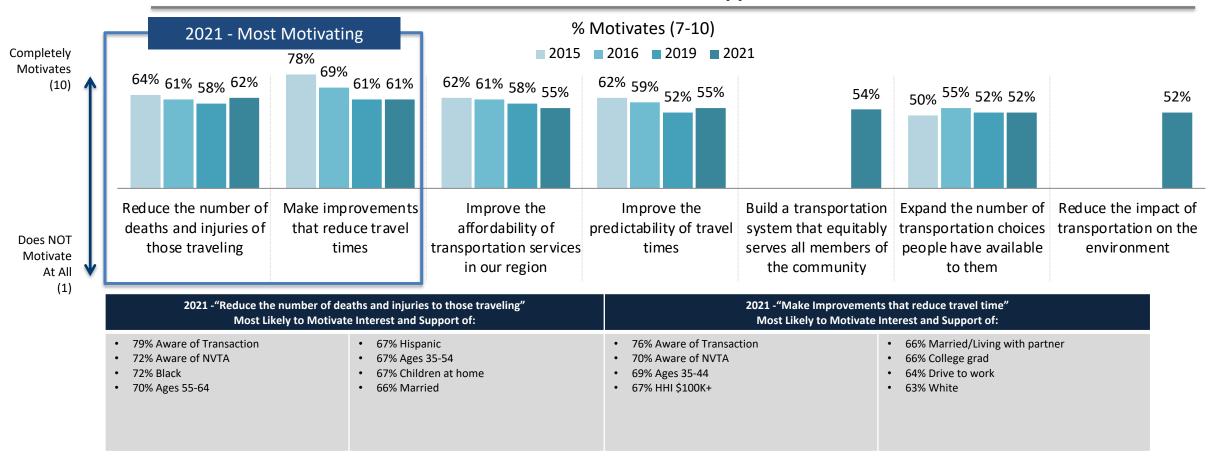






Messaging statements score similarly to 2019 with the most impact coming from making roads safer and reducing travel times.

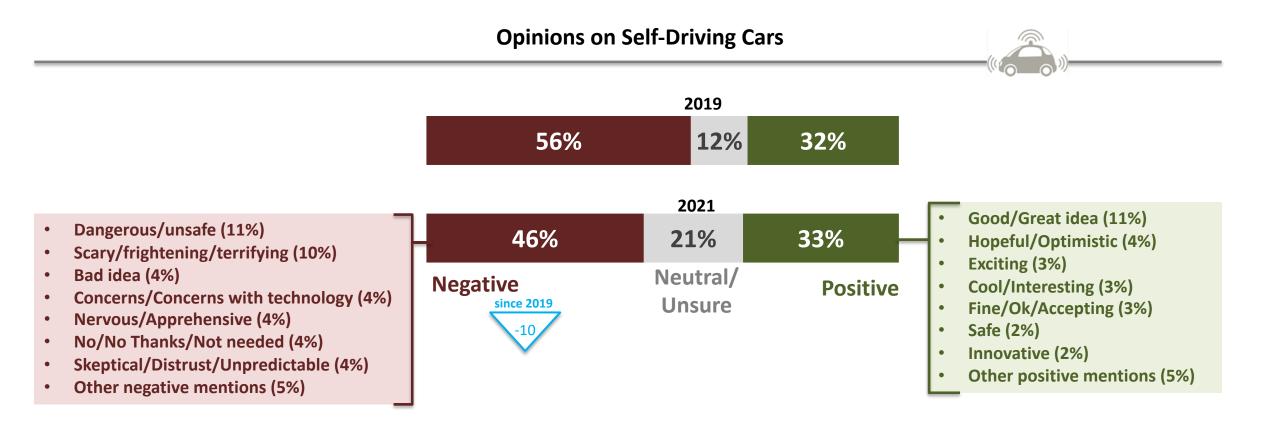
Motivates Interest and Support







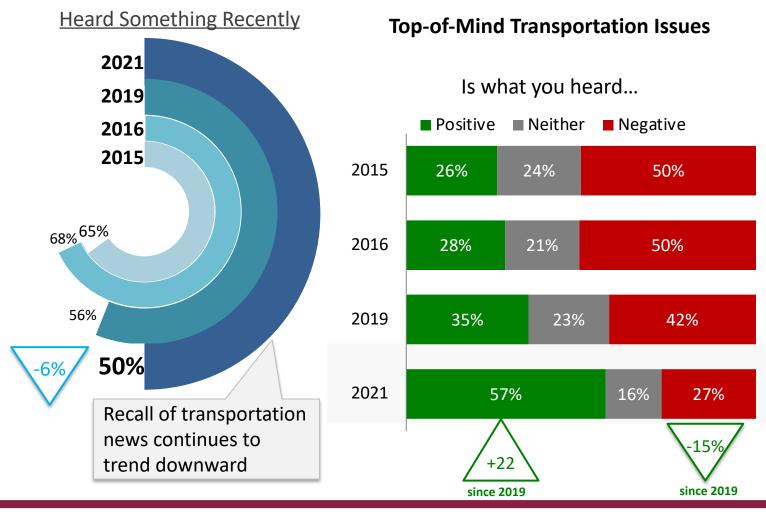
Negative perceptions of self-driving cars decrease but continue to illustrate concerns for safety among regional residents.





Transportation NEWS RECALL

Although recall of news decreased, the ratio of positive to negative news increased significantly from prior waves.



Most Likely to Hear Something *Positive in 2021*:

57% TOTAL

- 83% Aware of TransAction
- 78% Arlington County
- 72% Hispanic
- 70% Children at home
- 70% age 25-34
- 69% Black
- 67% Live and work in the same county/city
- 66% Male
- 66% Aware of NVTA
- 62% Lived in region majority of life
- 62% Own home
- 61% Employed
- 60% College grad

Most Likely to Hear Something *Negative in 2021*:

27% TOTAL

- 41% Some college
- 38% Unemployed
- 36% Rent
- 36% Single
- 36% Not lived in region majority of life
- 35% White
- 35% No children at home
- 35% Unaware of TransAction
- 34% Unaware of NVTA





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

Top-of-Mind Transportation Issues

Positive

25% Metro/WMATA Mentions

- The Metro looks cleaner and more sophisticated
- Extending the Metro into Loudoun County
- New Metro station in Alexandria
- WMATA purchasing new equipment & expanding its service

17% Road Mentions

- The creation of new roads to reduce road congestion.
- Road work is constantly being conducted
- Widening the roads that are heavily populated

10% I-66 Mentions

- Route 66 is being redone to add lanes and improve traffic flow
- The I-66 expansion and toll lanes
- Major initiative to improve the traffic flow on I-66 to make it easier to commute between DC and the suburbs of Virginia

6% Bus Mentions

- They're making public transportation easier to ride by providing free bus service
- Making bus services free
- New bus routes and fare changes for the DASH buses in Alexandria, VA, which makes me happy
- Lower bus fares on the Fairfax Connector

5% Traffic/Congestion Mentions

- Reducing congestion and directing traffic lanes
- Infrastructure bill was passed that should help with roads and bridges which I hope helps traffic congestion



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

Top-of-Mind Transportation Issues

Negative

• 67% Metro/WMATA Mentions*

- Funding for the Metro system has been a big issue
- Aging to the Metro system is causing failures and even a derailment
- Metro lack of maintenance, toll roads rising prices
- Metro rail is delayed in opening in Loudoun County
- Delayed building of new Metro stops
- Always problems and cost overruns with Metro rail
- Metro trains are severely limited due to wheel problems

21% Traffic Congestion Mentions**

- Traffic is awful
- Every time you turn the news on, there's a traffic pile up on the beltway
- You can sit hours just to go a couple miles

11% Road Mentions**

- More highway lanes will mean more cars and congestion
- Roads are terrible
- expansion of route 1 near Huntington Metro raises issues for those living near the road

• 10% Tolls**

- They keep adding HOT lanes for tolls
- They are building toll roads all over the place
- Toll roads are increasing

5% I-66 Mentions

- Constantly working on I-66
- Continual backups and traffic jams throughout the region especially on the beltway and Rt 66



^{*} Up significantly from 2019

^{**} Down significantly from 2019

Negative comments most commonly center around problems/issues, delays, and safety/accidents/derailments.

Changes in Number and Types of Comments about WMATA

	2015	2016	2019	2021
Metro/WMATA (Net)	45%	62%	33%	67%
Metro having problems/issues	17%	18%	8%	19%
Metro service delays	5%	2%	7%	13%
Metro service negative mentions	2%	15%	5%	6%
Metro funding issues	2%	6%	3%	3%
Metro safety/accidents/derailments	4%	7%	3%	9%
Metro construction issues	1%	1%	3%	4%
Metro leadership negative mentions	5%	1%	3%	7%
Metro Silverline negative mentions	4%	3%	2%	4%
Metro Orange line negative mentions	2%	1%	2%	-
Metro increase rates/fees	6%	1%	1%	-
Metro fire/smoke issues	3%	2%	-	1%
Metro decline in ridership	2%	1%	-	1%
Metro Blue line negative mentions	2%	1%	-	-
Metro maintenance issues	1%	10%	-	7%
Metro equipment negative mentions	3%	1%	-	7%
Metro SafeTrack negative mentions	-	3%	-	-
Other negative Metro/WMATA mentions	3%	6%	1%	2%



Use of social media as an information source continues to increase with Facebook dominating. News gleaned from community meetings doubled (+11 points) likely a function of increased access through virtual/online meetings.

Most Recent Information Sources for Transportation Issues

		2015	2016	2019	2021
		(n=400)	(n=411)	(n=363)	(n=311)
	Television/News story	54%	57%	49%	58%
P	Social Media	24%	31%	38%	49%
:	Radio ad/news/discussion	41%	38%	32%	36%
NEWS	Print article or ad In newspaper, magazine, flyer or information packet	46%	45%	36%	34%
i jė ji	Community Meeting	7%	9%	10%	21%
	Website	5%	2%	4%	7%

	Source	2021
f	Facebook	32%
y	Twitter	24%
O	Instagram	24%
;	Other social media	8%

Websites mentioned in 2021

- ArlNow.com
- VDOT (www.virginiadot.org)
- WashingtonPost.com
- WMATA.com
- WTOP.com

New residents, Arlington residents, and younger residents are among those who are more likely to get their regional transportation news via social media.

More likely to use social media



49% TOTAL

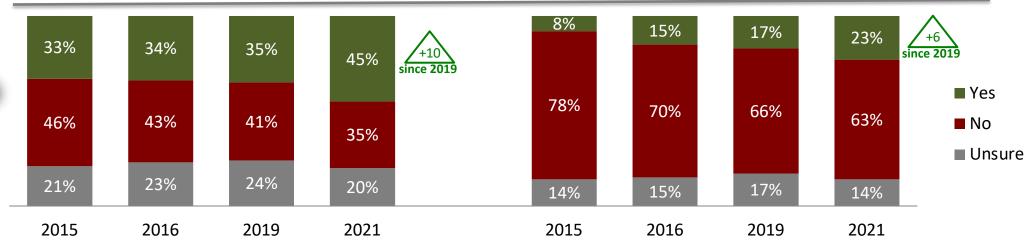
- 75% Aware of TransAction
- 73% Have lived in the region for less than 5 years
- 72% Live in Arlington
- 69% Ages 25-34
- 67% Children at home
- 66% Hispanic
- 61% Ages 35-44
- 60% Live and work in same region
- 57% HH income 100K+
- 55% Aware of NVTA
- 55% Employed/Student
- 52% Own home

Transportation **AWARENESS LEVELS AND** PERFORMANCE RATINGS FOR THE REGION AND REGIONAL AGENCIES

Awareness of NVTA and TransAction is limited but continues to grow.

Have you ever heard of...





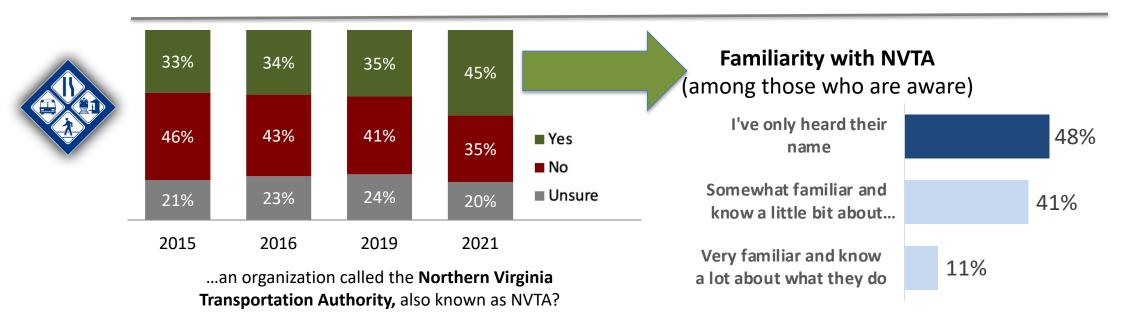
...an organization called the **Northern Virginia Transportation Authority,** also known as NVTA?

...the **TransAction** long range transportation plan?

% Most Likely to Have Heard of NVTA (2021)		% Most Likely to Have Heard of TransAction (2021)			
•	62% Less than 5 yrs. in region 60% Arlington County	57% Hispanic55% Ages 25-34	 48% Less than 5 yrs. in region 46% Arlington County 42% Aware of NVTA 42% Hispanic 	 40% Ages 25-34 39% Children at home 33% Black 33% Live and work in same county/city 	

Familiarity with NVTA (among those who are aware) tends to be limited to name recognition.

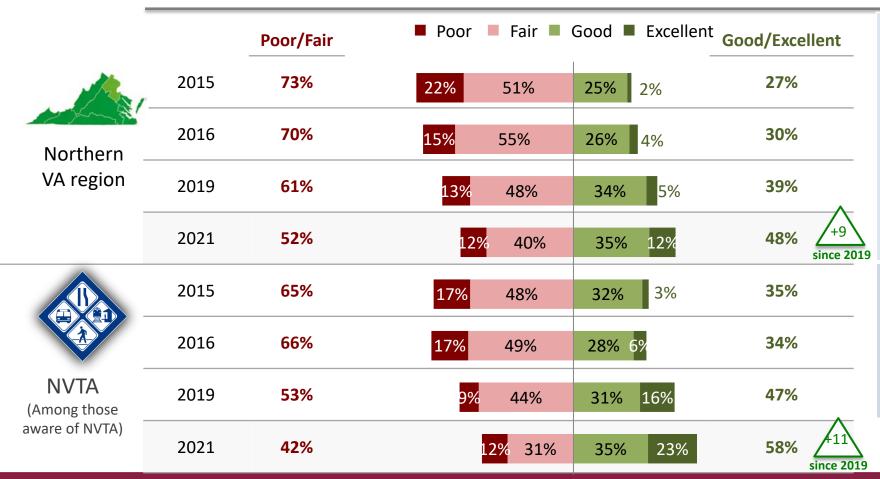
Have you ever heard of...





Performance ratings continue to increase and show strongest scores among those aware of NVTA.

Performance on Planning and Implementing Transportation Solutions



NOVA Region Performance, those rating it higher (as good/excellent) (2021):

48% - Total

- 72% Arlington County
- 70% Aware of TransAction
- 59% Ages 25 to 34
- 58% In region 1-5 years
- 58% Aware of NVTA
- 53% Live/work same region

NVTA Performance, those rating it higher (as good/excellent) (2021): 58% - Total

- 88% Arlington County*
- 75% Hispanic; 74% Ages 25 to 34
- 73% Aware of TransAction
- 68% Asian*
- 67% Lived in region <5 years
- 66% Live/work same location
- 63% have lived in region majority of life
- 61% Employed/student
- 58% Aware of NTVA

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







DEMOGRAPHICS

Demographics

		2015	2016	2019	2021
Gender	Male	48%	48%	47%	48%
	Female	52%	52%	53%	52%
Age	18-24	7%	11%	15%	13%
	25-34	22%	22%	22%	21%
	35-44	24%	21%	21%	25%
	45-54	20%	21%	15%	12%
	55-64	15%	14%	15%	15%
	65+	12%	11%	13%	14%
thnicity	White	58%	58%	52%	52%
	Hispanic	15%	15%	17%	17%
	Black	11%	11%	12%	12%
	Asian	14%	14%	15%	15%
	Hawaiian/Pacific Islander	<1%	<1%	<1%	<1%
	Native American/ Alaskan native	<1%	<1%	<1%	<1%
	Multi-race	2%	2%	4%	4%
	Other	<1%	<1%	<1%	<1%
/larital	Married/Civil Union	60%	56%	51%	52%
	Single, never married	24%	32%	31%	29%
	Divorced/Separated/Widowed	11%	14%	12%	10%
	Living with Partner	5%	3%	6%	5%
	Decline to answer	<1%	<1%	<1%	<1%

		2015	2016	2019	2021
Education	HS or less	5%	7%	13%	15%
	Some college	15%	14%	16%	14%
	Associates Degree	6%	6%	7%	7%
	Bachelor's Degree	35%	37%	31%	30%
	Master's Degree	28%	27%	25%	24%
	Professional Degree	7%	5%	4%	6%
	Doctorate Degree	4%	4%	4%	4%
	Decline to answer	<1%	<1%	<1%	1%
Employment	Employed (NET)	73%	72%	71%	71%
	Full-time	64%	58%	55%	59%
	Part-time	5%	9%	11%	8%
	Self-employed	4%	5%	6%	4%
	Not employed (NET)	15%	16%	20%	18%
	Not employed, looking	2%	1%	3%	3%
	Not employed, not looking	<1%	1%	1%	1%
	Not employed, unable	<1%	1%	2%	2%
	Retired	13%	13%	14%	12%
	Student	3%	7%	4%	5%
	Stay home spouse/ partner	8%	5%	4%	5%
	Decline to answer	<1%	1%	<1%	1%
Household Incom		13%	16%	24%	21%
	\$35,000-\$74,999	22%	22%	20%	23%
	\$75,000-\$99,999	17%	18%	14%	14%
	\$100,000-\$149,999	25%	21%	19%	18%
	\$150,000-\$199,999	11%	11%	13%	11%
	\$200,000+	11%	10%	13%	19%
	Decline	9%	8%	6%	4%

