

NORTHERN VIRGINIA TRANSPORTATION AUTHORITY

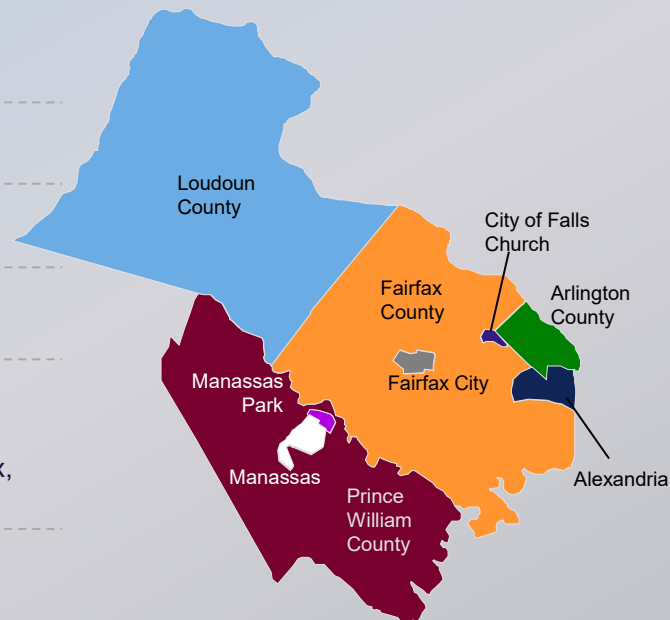
Tracking Changes in Transportation Attitudes and Priorities

February 8, 2024



Methodology

	PARTICIPANTS	n=606 Residents 18 years or older within jurisdiction of Northern Virginia Transportation Authority
	FIELD DATES	November 28 – December 14, 2023
	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	2023 No weighting required 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 - 2023 Survey

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. Weighting was not needed for the 2023 wave.

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=606) would produce a margin of error of $\pm 3.98\%$ 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.

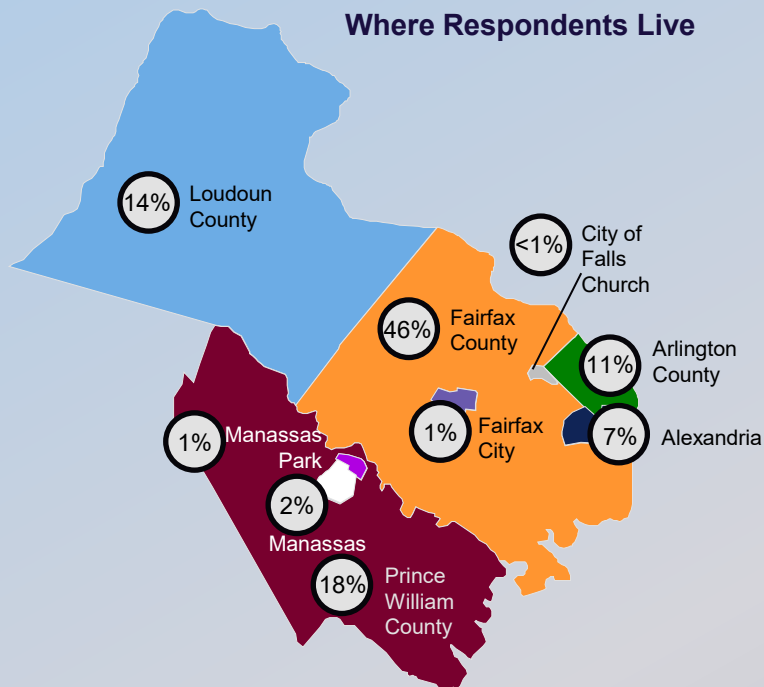
Statistical Testing Notations



- Indicates statistically significant differences between 2021 and 2023 ($p < .05$). 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.
 - Abbreviations: T3B = Top 3 Box Score (rated 8-10 on a 10-point scale)

Resident Profile

Where Respondents Live



County/City of Employment	2015	2016	2019	2021	2023
Fairfax County	37%	36%	35%	38%	40%
District of Columbia	18%	12%	11%	6%	9%
Arlington County	11%	11%	12%	14%	9%
Loudoun County	8%	13%	12%	13%	13%
Alexandria	7%	9%	9%	8%	8%
Prince William County	6%	8%	12%	11%	11%
Manassas	4%	2%	2%	2%	2%
Fairfax City	2%	2%	2%	3%	2%
City of Falls Church	1%	1%	1%	1%	<1%
Manassas Park	<1%	<1%	1%	<1%	1%
Other county in Virginia	1%	1%	2%	1%	1%
Other county in Maryland	3%	2%	1%	1%	1%
Other	1%	3%	2%	2%	1%

Years of Residency

Less than 1 year	3%	2%	3%	5%	2%
1 to 5 years	19%	16%	17%	22%	16%
6 to 10 years	14%	12%	14%	12%	12%
11 to 15 years	12%	14%	11%	9%	9%
More than 15 years	51%	56%	55%	52%	60%

Own/Rent Home

Own	65%	70%	64%	63%	61%
Rent	32%	26%	31%	31%	33%
Neither	2%	3%	3%	3%	5%
Decline	1%	1%	2%	3%	1%

KEY FINDINGS

Key Findings



Investing in regional transportation remains a priority. Traffic and congestion have the second highest impact on the quality of life in the region (trailing only affordability of housing).



Commuting habits are still impacted by the post-pandemic shift to work from home, but most residents are commuting to work at least a few days a week and are on the road even more for non-work purposes.



Safety is always a priority when it comes to transportation. Crime is on the rise and personal security is playing an increasingly important role in quality of life in the region. The increased attention on crime increases focus on safety (in general).



Opportunity for BRT - Despite limited familiarity with Bus Rapid Transit, residents have a favorable outlook, seeing many more benefits than drawbacks.



Transportation issues are a bit less top of mind. Recall of transportation issues in the news and awareness of NVTa have softened compared to the last wave. Perceptions of the region's performance in planning and implementing transportation solutions remains positive, but intensity has softened.



Executive Summary:

- **Regional transportation remains a priority and is a leading factor in influencing quality of life.**
 - Nine-out-of-ten agree that *Investing in the regional transportation* is a top priority in 2023. This is consistent with 2021 data and signals the continued importance of investing in our region's transportation system and infrastructure.
 - *Improving affordability of housing* and *Reducing traffic congestion & Improving transportation options* remain the top two factors that contribute to quality of life in the Northern Virginia region.
 - *Traffic flow and congestion* remains the biggest transportation factor impacting quality of life. Perceptions of how well the region addresses these concerns have improved, but there is still work to be done. The top priorities for future improvements include leveraging technology, expanding metro, improving roadways and offering Bus Rapid Transit (BRT) options.



Executive Summary:

- **A recent Washington Post article¹ noted how remote work continues to thrive in the region. This continues to shape commuting habits.**
 - The article does point out that the DC area may see more employees returning to office and shows evidence of decreases in work from home. Remote work is likely to remain part of the post-pandemic reality, but we can expect a continued shift to a hybrid that has a mix of work from home and work from the office.
- **Despite changing work habits, most residents are on the road on a weekly basis. Most are commuting at least a couple days a week and driving even more frequently for non-work purposes.**
 - Most residents use public transit, but daily usage has softened.

¹ <https://www.washingtonpost.com/dc-md-va/2023/09/14/dc-remote-work-jobs-data-census-bureau/#>



Executive Summary:

- **Safety remains an important part of the story as it is playing an increasing role in affecting quality of life.**
 - *Reducing crime and making neighborhoods safer* has increased 7 points to replace *Increasing access to high quality, affordable healthcare* as the third biggest factor impacting quality of life.
 - Safety improvements serve as an influential topic to engage and motivate regional residents. When looking at specific language, calling out benefits and how they connect to the individual hold the strongest equity (i.e., *Get you quickly and safely where you need to be*).
 - When looking specifically at transportation priorities, *Making our transportation system safe* remains the top priority and has increased in importance since 2021. It is the strongest performing attribute (80%) but continues to show a large gap when compared to importance (45%).



Executive Summary:

- **Bus Rapid Transit (BRT) offers the region an opportunity to further improve transportation options. Initial reactions are positive, but familiarity is lacking. Leveraging key benefits will help further strengthen interest.**
 - Most (69%) are *Not too or not at all familiar* with BRT, but views are *Favorable* (51%) or *Neutral* (41%).
 - More than half would consider using BRT (54% for commuting and 63% for recreational/personal travel).
 - The strong majority (84%) feel the positives associated with BRT outweigh any negatives and the most influential benefits are *Convenience* (15%); *Time savings compared to driving* (12%); *Faster and more reliable trips* (10%).



Executive Summary:

- **Awareness of regional transportation news, NVTA and TransAction have softened since 2021.**
 - Overall, respondents are less likely to recall hearing, reading or seeing news about transportation issues in the region and awareness of both NVTA and TransAction have both softened in 2023 (after seeing a steady growth trend from 2016-2021).
 - For those who do recall hearing, reading or seeing news about transportation issues in the region, it tends to be more of a balance of positives (39%) and negatives (40%) whereas 2021 data was more positive (57%) than negative (27%).
- **The region and NVTA both continue to maintain positive perceptions of their performance in planning and implementing transportation solutions in the region.**
 - Intensity of scores have softened - increase in GOOD scores while the EXCELLENT scores show a decline.

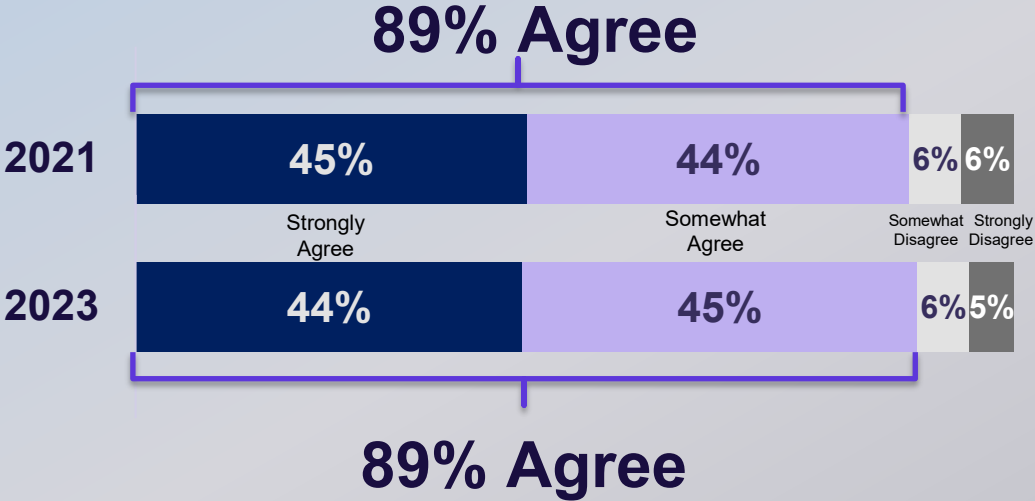
Transportation

REGIONAL TRANSPORTATION PERCEPTIONS AND EXPERIENCES

Investing in regional transportation remains an important priority.

To what extent do you agree with the statement:

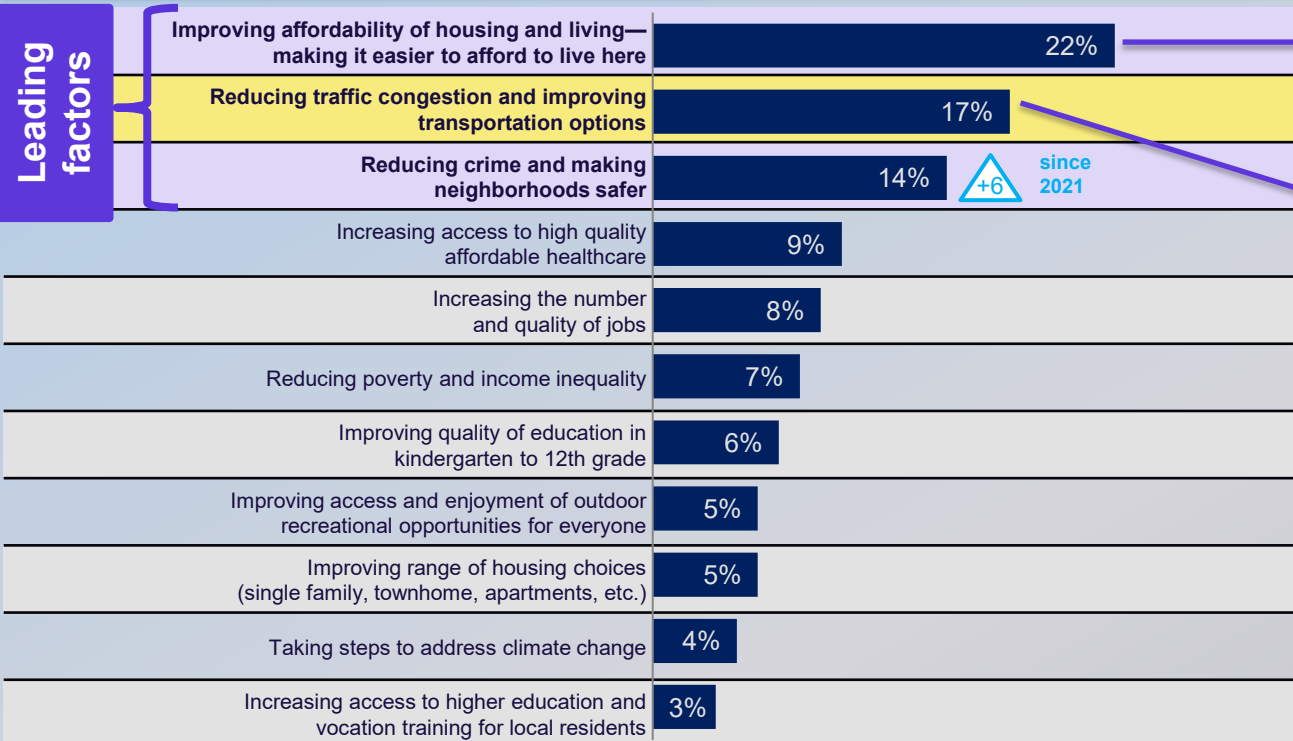
Investing in the regional transportation system is an important priority



Transportation factors have a significant impact on quality of life.

Significant Impact on Quality of Life

2023 Total



Improving housing affordability is more imp. to (2023):

- Renters (32%)
- Females (29%)
- Single (29%)
- Divorced/Separated/Widow (29%)
- Never use public transit (28%)

When looking across groups, reducing traffic congestion is more important to (2023):

- Work in DC (36%)
- Ages 55+ (23%)
- Asian (23%)
- HHI \$100K (22%)
- Homeowners (22%)

BASE: ALL RESPONDENTS (2016 n=606, 2019 n=616, 2021 n=611, 2023 n=606)

Q156. People in different regions of the country mention many factors that contribute to their quality of life. Thinking about the quality of life specifically in the Northern Virginia region, please identify which one of the following factors has the most significant impact on the overall quality of life for you personally.

 Denotes statistically significant differences between 2021 and 2023 (p<.05)

After a steady decline, impact of transportation factors has stabilized.
The impact of crime, however, has seen a notable increase.

Significant Impact on Quality of Life	2016	2019	2021	2023
Improving affordability of housing and living—making it easier to afford to live here	18%	24%	21%	22%
Reducing traffic congestion and improving transportation options	33%	26%	16%	17%
Reducing crime and making neighborhoods safer	8%	7%	8%	14%
Increasing access to high quality affordable healthcare	6%	8%	10%	9%
Increasing the number and quality of jobs	12%	10%	9%	8%
Reducing poverty and income inequality	6%	7%	7%	7%
Improving quality of education in kindergarten to 12th grade	6%	4%	6%	6%
Improving access and enjoyment of outdoor recreational opportunities for everyone	4%	4%	7%	5%
Improving range of housing choices (single family, townhome, apartments, etc.)	4%	7%	6%	5%
Taking steps to address climate change			5%	4%
Increasing access to higher education and vocation training for local residents	4%	3%	6%	3%

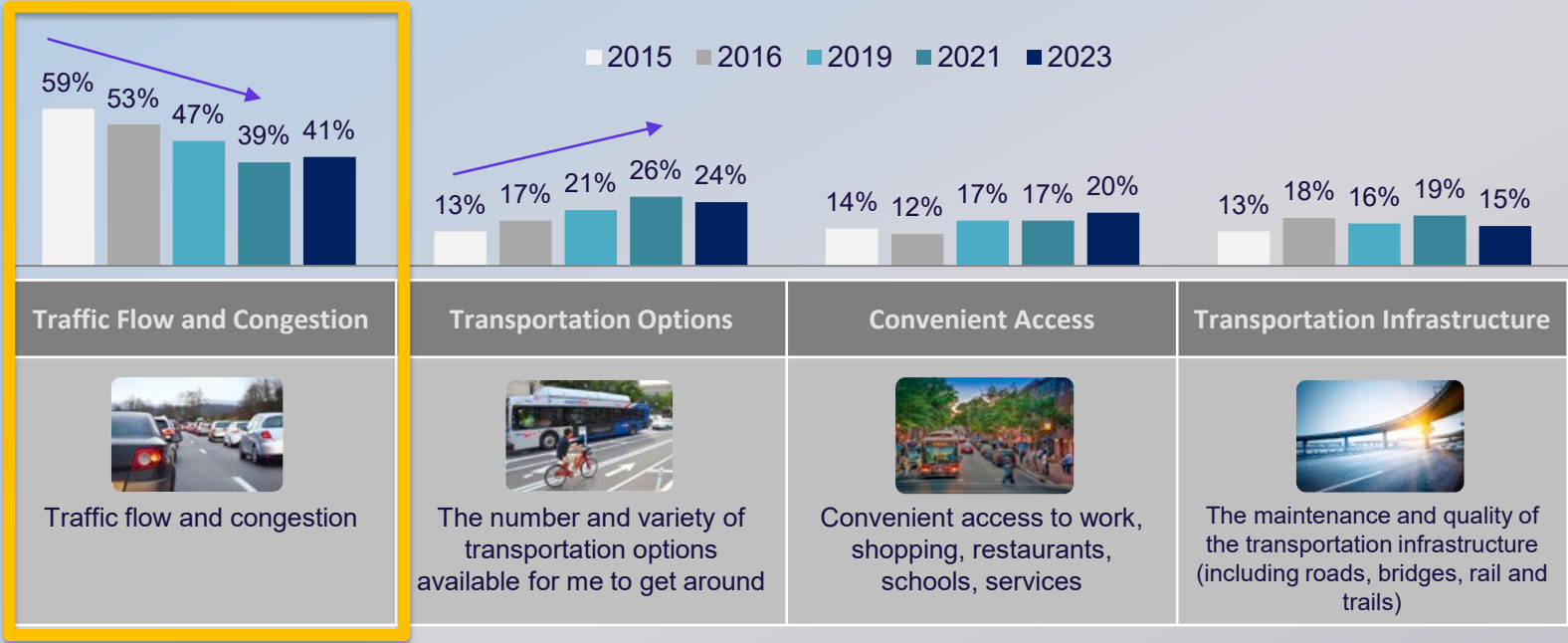
Affordability and transportation have always been the top two factors impacting quality of life. They are inter-related. Affordability has become the leading factor impacting quality of life as traffic/congestion have improved and are less of a priority.

BASE: ALL RESPONDENTS (2016 n=606, 2019 n=616, 2021 n=611, 2023 n=606)
Q156. People in different regions of the country mention many factors that contribute to their quality of life. Thinking about the quality of life specifically in the Northern Virginia region, please identify which one of the following factors has the most significant impact on the overall quality of life for you personally.

Denotes statistically significant differences between 2021 and 2023 (p<.05)

Looking specifically at transportation factors, *Traffic flow and congestion* continues to have the biggest impact followed by *Transportation options*.

Which Transportation Factor has the Biggest Impact on Quality of Life?



BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616), 2021 n=611, 2023 n=606)
Q520. Northern Virginia residents and workers have mentioned different factors relating to transportation—both positive and negative—that contribute to or detract from their quality of life. Thinking about transportation here in this region and your personal quality of life, please identify which one of the following you feel has the biggest impact on you and your family personally?

Denotes statistically significant differences between 2021 and 2023 (p<.05)

When looking at which transportation factor has the biggest impact on quality of life, some unique demographic and behavioral profiles emerge.

Biggest Impact on Your Quality of Life – Subgroup Analysis



Traffic Flow and Congestion (41%)

- 54% Ages 55+
- 52% Never uses public transit
- 48% Unemployed
- 47% White
- 47% Prince William County
- 47% Occasionally uses public transit
- 46% Have not lived in region majority of life



Traffic plays a bigger role among older, white, non-public transportation users.

Transportation Options (24%)

- 39% Uses public transit daily/weekly
- 35% HHI <\$50K
- 29% Arlington County
- 29% Ages 35-54



Transportation options have a bigger impact on middle aged commuters who use public transportation.

Convenient Access (20%)

- 31% Black
- 28% Lived in region less than 5yrs
- 27% Ages 18-34
- 26% Asian
- 26% Single
- 26% Renter



Convenient access is important for younger, single, minorities.

Transportation Infrastructure (15%)

- 26% Aware of TransAction
- 20% Aware of NVTA



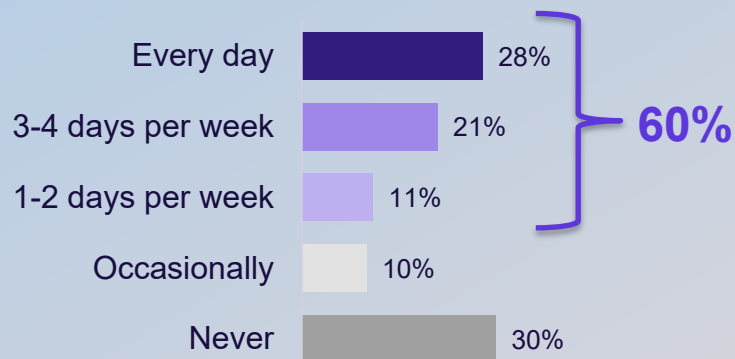
Infrastructure has a bigger impact among those who follow developments related to regional transportation.

BASE: ALL RESPONDENTS (2021 n=611, 2023 n=606)

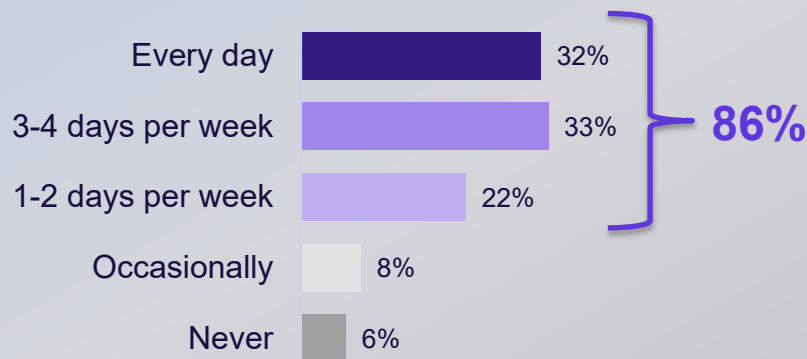
Q520. Northern Virginia residents and workers have mentioned different factors relating to transportation—both positive and negative—that contribute to or detract from their quality of life. Thinking about transportation here in this region and your personal quality of life, please identify which one of the following you feel has the biggest impact on you and your family personally?

Traffic impacts quality of life because most participants are driving on a regular basis. While driving to work is common, driving is more frequent for non-work purposes.

How often do you drive to work?



How often do you drive for non-work purposes?

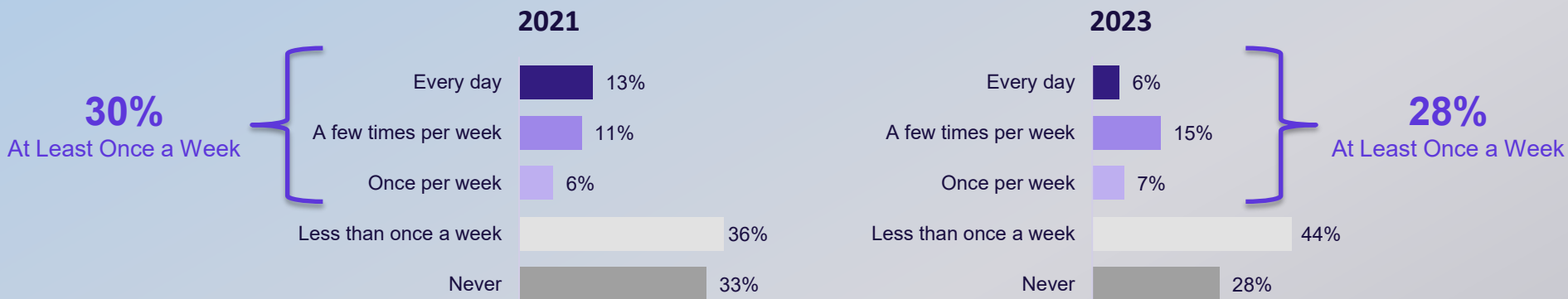


Drives to work regularly/at least once a week

2023: 60%
2021: NA
2019: 59%
2016: 62%

Most residents use public transportation, but daily usage has softened (which may be a function of a post pandemic shift to working from home/hybrid schedules).

How Often do you Use Public Transit?



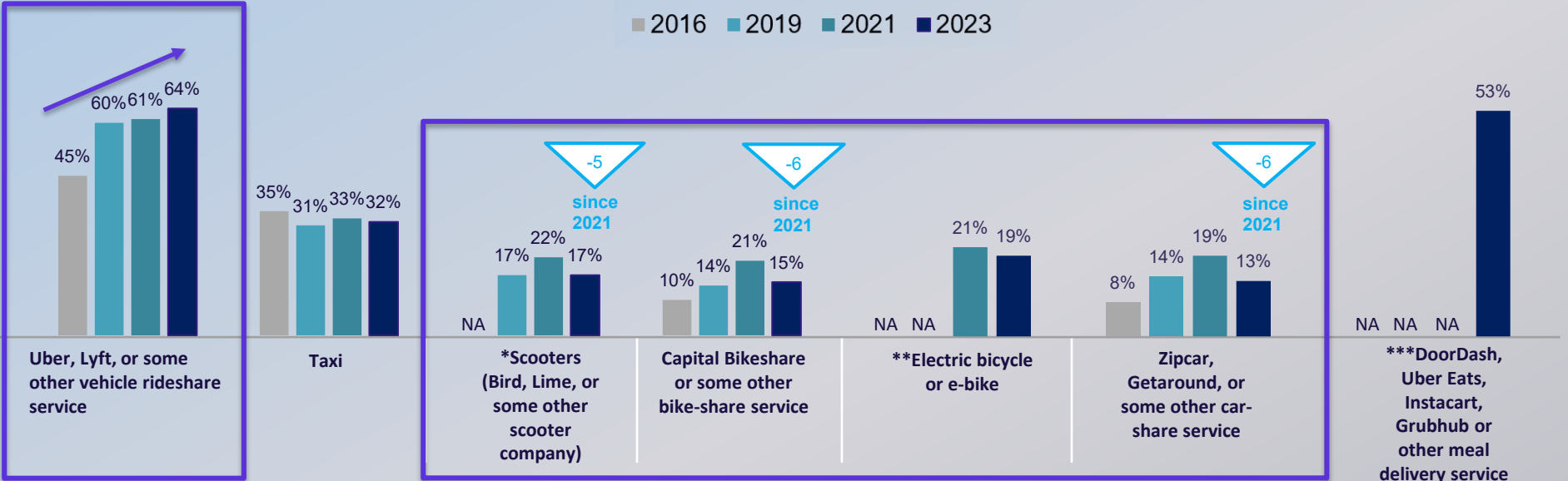
D.C. and the Washington metro area showed some of the highest rates in the nation. Just over a third of the District's residents (33.8 percent) worked from home in 2022, down from 48.3 percent the year before, when the city topped the list, according to the American Community Survey, conducted annually by the Census Bureau. Only Seattle had a higher share of remote workers last year among cities, at 36 percent.

Transportation

CAR OWNERSHIP ALTERNATIVES
AND PERCEPTIONS OF
SELF-DRIVING VEHICLES

Rideshare services remain the dominant alternative to car ownership and continue to show a growth trend. Declines are observed in scooters, bikes and car share services.

Usage of Car Ownership Alternatives



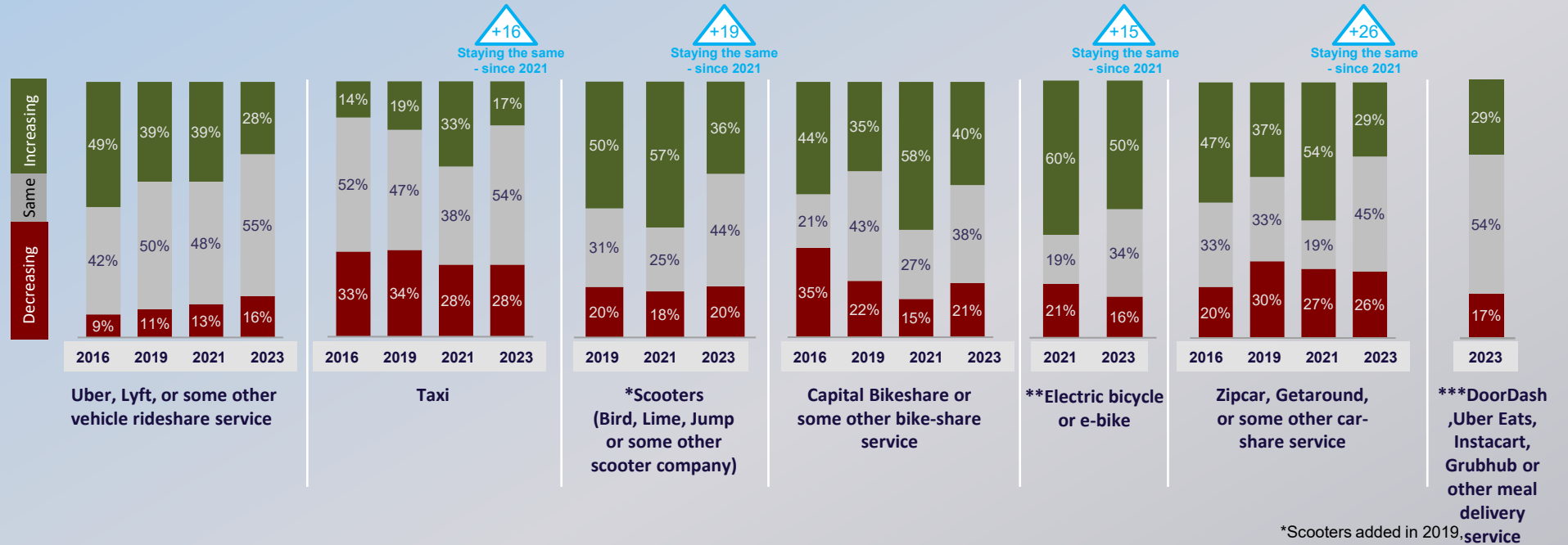
BASE: ALL RESPONDENTS (2016 n=606, 2019 n=616, 2021 n=611, 2023 n=606).
Q740. There are a number of alternatives to owning a car that are being used by people living in the region. Which of the following do you currently use?

Denotes statistically significant differences between 2021 and 2023 (p<.05)

*Scooters added in 2019,
**E-bikes added in 2021
***Meal delivery services added in 2023

Reported changes in usage show growth rates tapering off. The most commonly used alternatives (rideshare and taxi) are the most stable.

Reported Change in Usage of Car Ownership Alternatives



BASE: AMONG THOSE USING EACH SERVICE - UBER/LYFT (2016 n=265, 2019 n=352, 2021 n=370, 2023 n=389); Taxi (2016 n=208, 2019 n=189, 2021 n=199, 2023 n=195); Scooters (2019 n=94, 2021 n=134, 2023 n=100); Zipcar/Car2go/Getaround (2016 n=46, 2019 n=80, 2021 n=118, 2023 n=78*); Capital Bikeshare (2016 n=55, 2019 n=84, 2021 n=129, 2023 n=89*); Electric Bike/E-bike (2021 n=127, 2023 n=116); Meal Delivery Service (2023 n=322) Q745. Do you anticipate your usage increasing, decreasing or staying the same over the next 12 months for each of the following?



Denotes statistically significant differences between 2021 and 2023 (p<.05)

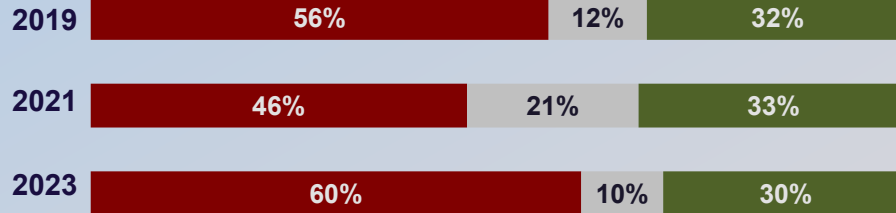
*Scooters added in 2019, service

**E-bikes added in 2021

***Meal delivery services added in 2023

Opinions on self-driving vehicles have grown increasingly more negative with concerns about safety and how well the technology can be trusted.

Opinions on Self-Driving Cars



Negative



- Dangerous/unsafe (17%)
- Scary/frightening/terrifying (11%)
- Skeptical/Distrust/Unpredictable (8%)
- Concerns/Concerns with technology (7%)
- Nervous/Apprehensive (6%)
- No/No Thanks/Not needed (5%)
- Bad idea (3%)
- Traffic/Congestion (2%)
- Other negative mentions (7%)

Neutral/ Unsure

- Depends/Conditional (4%)
- Cautious (3%)
- Questionable (2%)
- Future mentions (2%)
- Other/NA/DK (5%)

Positive

- Good/Great idea (7%)
- Hopeful/Optimistic (4%)
- Exciting (4%)
- Safe (3%)
- Innovative (3%)
- Cool/Interesting (2%)
- Fine/Ok/Accepting (2%)
- Hopeful (2%)
- Other positive mentions (6%)

BUSINESS

California orders Cruise driverless cars off the roads because of safety concerns

OCTOBER 24, 2023 · 4:34 PM ET

10/23 NPR Article

BASE: ALL RESPONDENTS (2019 n=616; 2021 n=611, 2023 n=606)

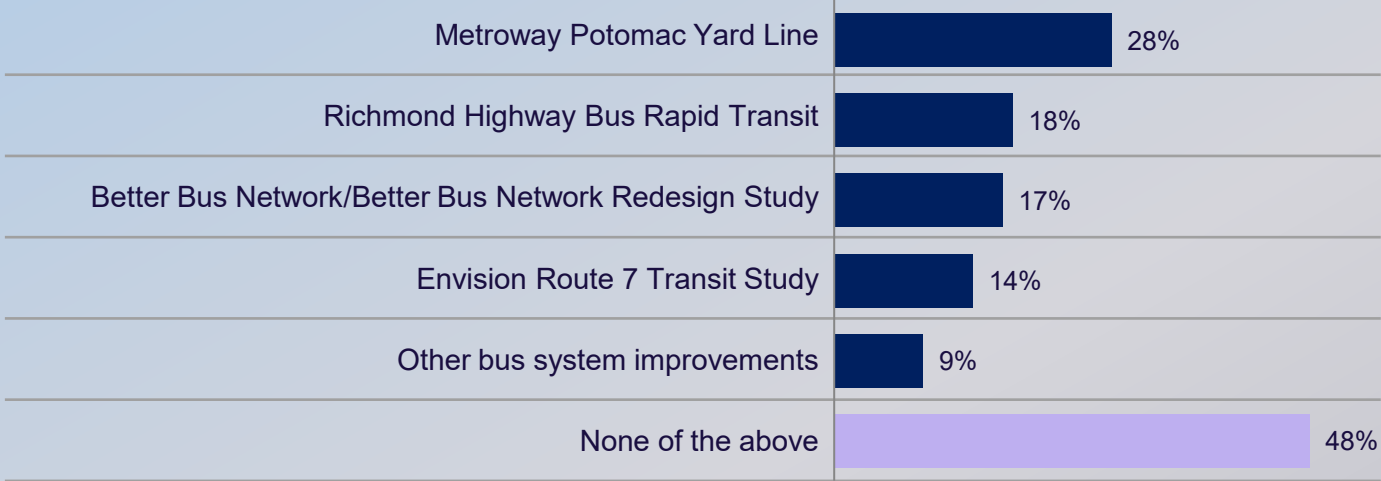
Q725. What one word or phrase would you use to describe your overall feelings of self-driving cars being on the road in Northern Virginia in the near future?

Transportation

REGIONAL BUS SYSTEMS

There is limited awareness of bus system initiatives.

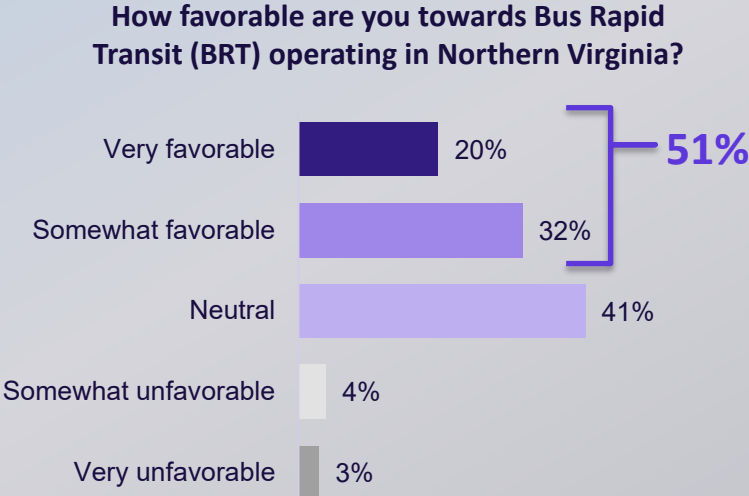
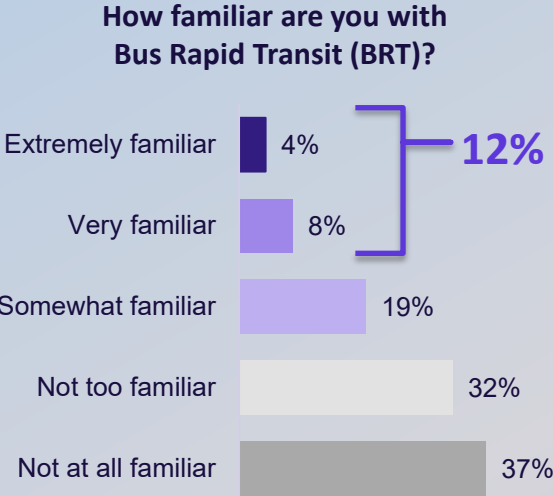
Which of the Following Initiatives are you Aware of...



Familiarity is limited and respondents tend to have either neutral or positive views toward BRT.

BRT – Bus Rapid Transit

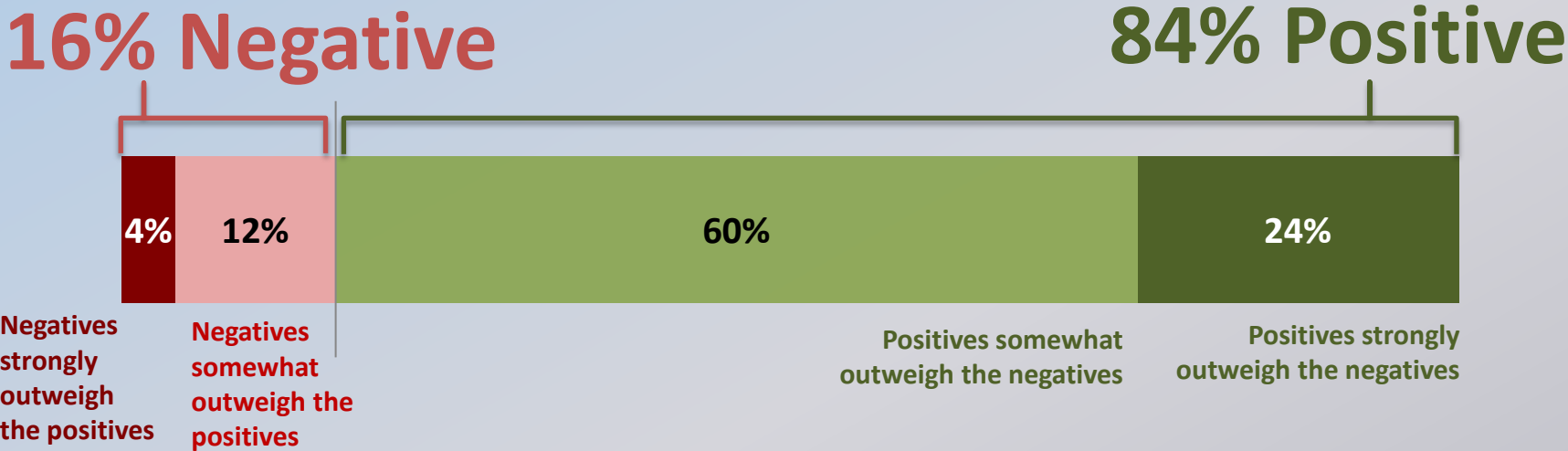
Bus Rapid Transit (BRT) is a high-quality bus-based transit system that delivers fast, frequent and reliable service that may include dedicated lanes, busways, transit signal priority, off-board fare collection, elevated platforms and enhanced stations.



BASE: ALL RESPONDENTS (2023 n=606)
Q450. Bus Rapid Transit (BRT) is a high-quality bus-based transit system that delivers fast, frequent and reliable service that may include dedicated lanes, busways, transit signal priority, off-board fare collection, elevated platforms and enhanced stations. How familiar are you with Bus Rapid Transit (BRT)?
Q455. How favorable are you towards Bus Rapid Transit (BRT) operating in Northern Virginia?

Residents are much more likely to see positive benefits of BRT than negatives.

Positives vs. Negatives Associated with BRT

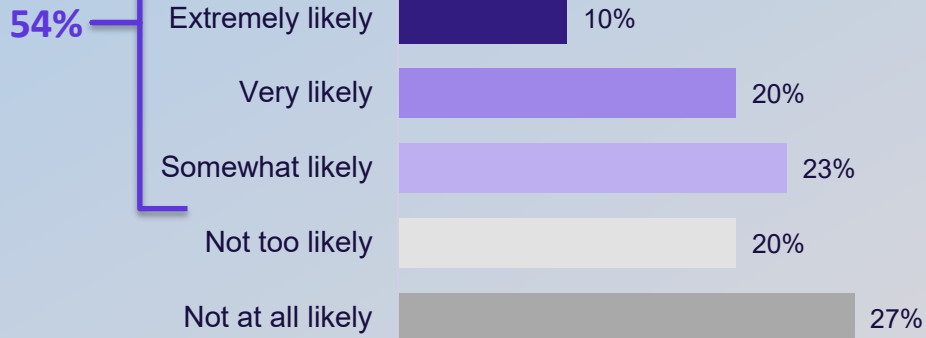


BASE: ALL RESPONDENTS (2023 n=606)
Q470. Thinking of all positives and negatives associated with Bus Rapid Transit (BRT), would you say the positives outweigh the negatives? Or the negatives outweigh the positives?

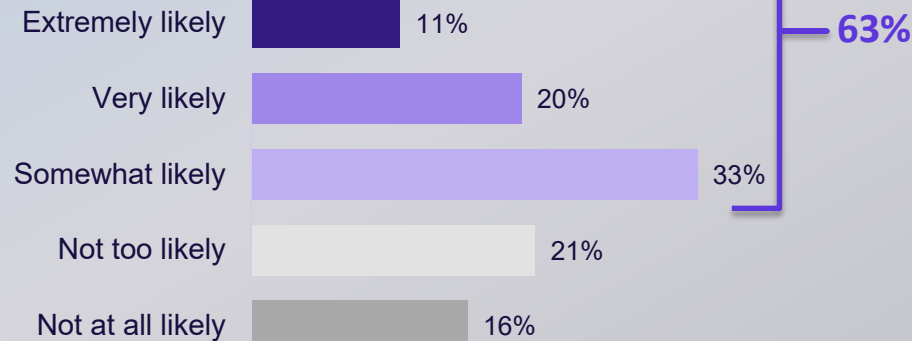
Residents are more likely to use BRT for personal purposes (about two thirds). Half are likely to use BRT for commuting purposes.

Likelihood to Consider Using BRT....

For Commuting Purposes

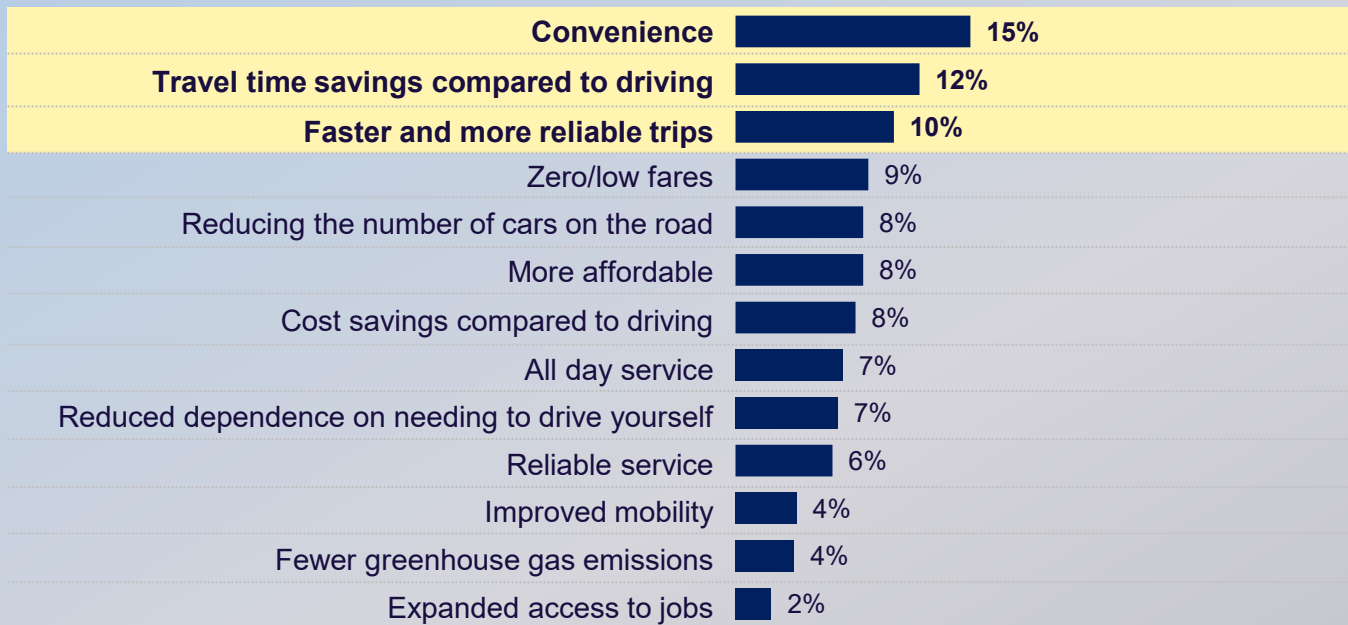


For Recreational/Personal Travel Purposes



Convenience, Saving time, and Reliability are the top influential benefits of using BRT.

Top Influential Benefits of Using BRT....



BASE: ALL RESPONDENTS (2023 n=606)

Q465. Which of the following benefits would be MOST influential in your decision to using Bus Rapid Transit (BRT) if it were available?

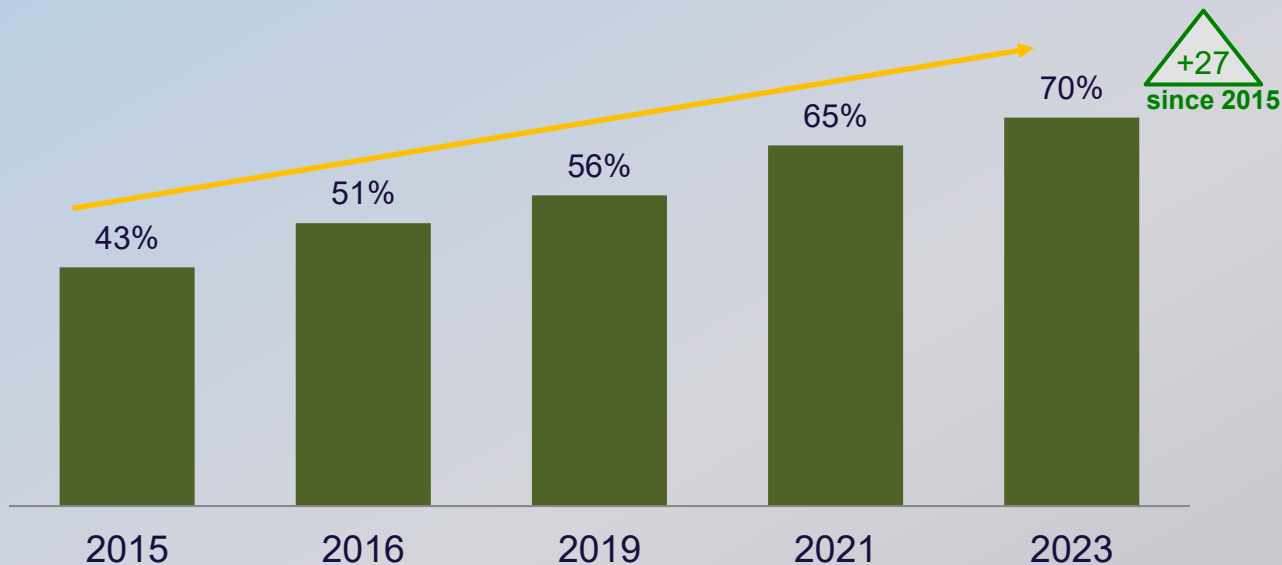
Transportation

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)



BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616, 2021 n=611, 2023 n=606)

Q530. Currently, when it comes to the number and variety of transportation options, do you feel that the region is doing a good job or a bad job?

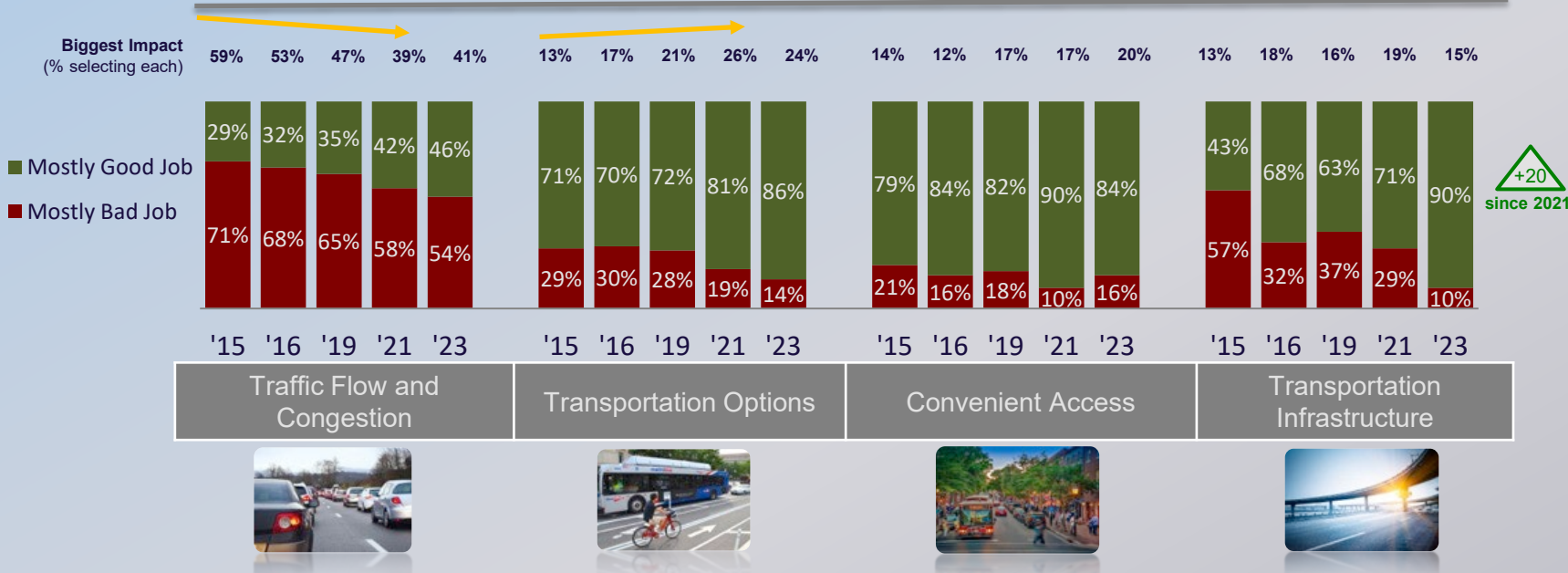
Q540. Currently, when it comes to the maintenance and quality of the transportation infrastructure do you feel that the region is doing a good job or a bad job?

Q550. Currently, when it comes to convenient access to work, shopping, restaurants, schools and services, do you think the region is doing a good job or a bad job?

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?

The region continues to improve in terms of addressing *Traffic and congestion* while maintaining strong scores for other transportation priorities.

Which transportation factor has the biggest impact and how well is the region performing in that area?



BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616, 2021 n=611, 2023 n=606). Q520. Northern Virginia residents and workers have mentioned different factors relating to transportation—both positive and negative—that contribute to or detract from their quality of life. Thinking about transportation here in this region and your personal quality of life, please identify which one of the following you feel has the biggest impact on you and your family personally? BASE: AMONG THOSE SELECTING EACH - TRANSPORTATION OPTIONS (2015 n=76, 2016 n=97, 2019 n=122, 2021 n=152, 2023 n=145); TRANSPORTATION INFRASTRUCTURE (2015 n=85, 2016 n=101, 2019 n=97, 2021 n=113, 2023 n=93*) CONVENIENT ACCESS (2015 n=84, 2016 n=71, 2019 n=97, 2021 n=105, 2023 n=122) TRAFFIC CONGESTION (2015 n=365, 2016 n=337, 2019 n=300, 2021 n=241, 2023 n=246). Q530-Q560. Currently, when it comes to [ANSWER FROM Q520], do you feel that the region is doing a good job or a bad job?

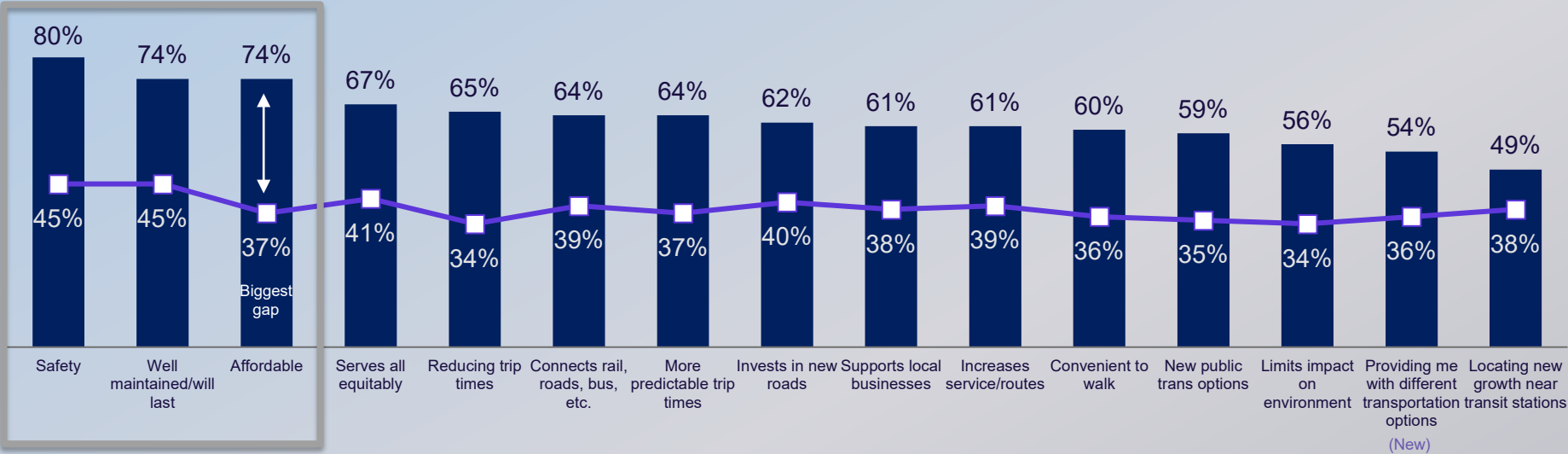
▽ Denotes statistically significant differences between 2021 and 2023 (p<.05)

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

Short Label	Full Label
Connects rail, roads, bus, etc.	<i>Providing a transportation system that connects rail, roads, bus, biking and pedestrians</i>
Affordable	<i>Making sure that our transportation system is affordable</i>
Supports local businesses	<i>Building a transportation system that supports local businesses and the regional economy</i>
Reducing trip times	<i>Reducing trip times</i>
More predictable trip times	<i>More predictable trip times</i>
New public trans options	<i>Providing new public transportation options</i>
Invests in new roads	<i>Investing in new highways and road improvements</i>
Locating new growth near transit stations	<i>Locating new growth in the region near transit stations</i>
Increases service/routes	<i>Increasing existing service and routes of public transit systems</i>
Convenient to walk	<i>Making it convenient to walk or bike to neighborhood stores, businesses, and schools</i>
Safety	<i>NEW WORDING for 2021: Making sure our transportation system is safe</i> <i>OLD WORDING: Making sure our transportation system takes advantage of the latest technologies to make it more efficient and safer</i>
Well maintained/Will last	<i>Building a transportation system that is well maintained and will be around for a long time (added in 2021)</i>
Limits impact on environment	<i>Limiting the transportation system's impact on the environment (added in 2021)</i>
Serves all equitably	<i>Building a transportation system that serves all members of the community equitably (added in 2021)</i>
Provides different transportation options	<i>Providing me with different transportation options that reduce the need for me to drive alone (added in 2023)</i>

Safety, Maintenance, and Affordability are the three most important transportation priorities. Largest gap is with *Affordability*, but there is room for improved performance across the board.

2023: Importance & Performance of Regional Transportation Priorities – TOP 3 BOX SCORE*



Note – Shortened labels shown for priorities

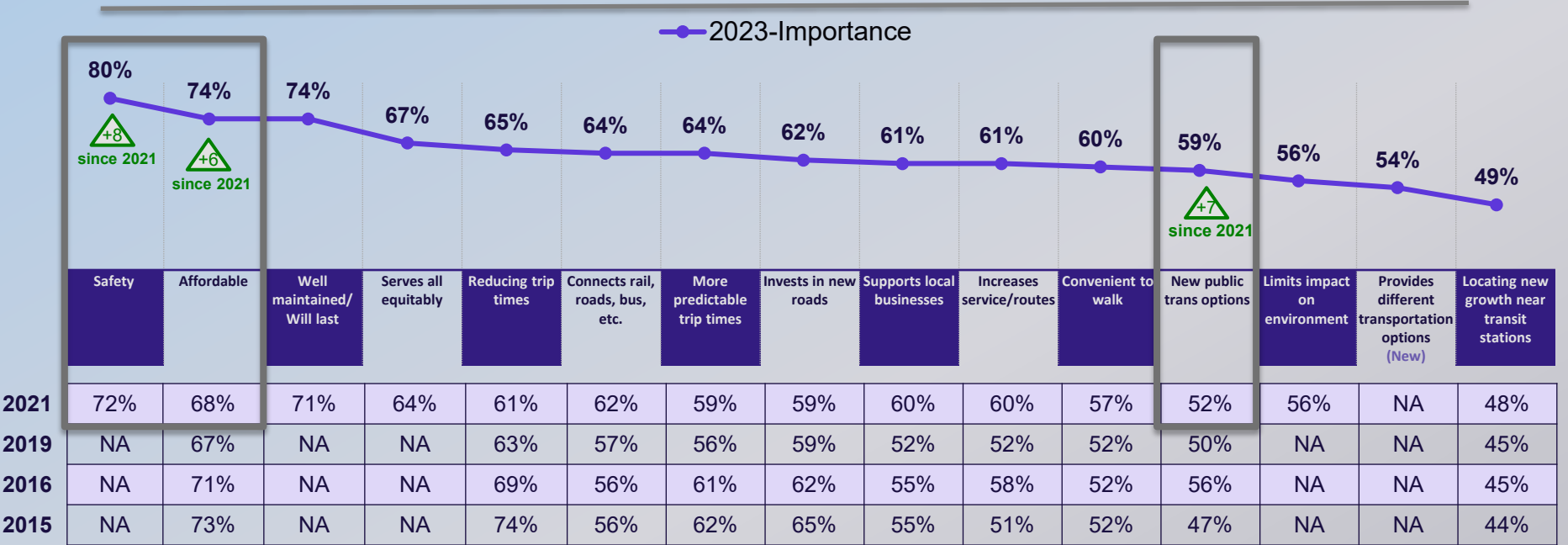
2023 - Importance 2023-Performance

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

BASE: ALL RESPONDENTS (2021 n=611, 2023 n=606)
Q600. Thinking specifically about transportation issues and priorities, please rate each of the following where 1 means 'Not at all important to the future of the region' and 10 means 'Extremely important priority for the future of the region.'
Q605. Please indicate how well you think Northern Virginia is performing on each of these priorities using the scale where 1 means the region is not performing well at all and 10 means the region is performing extremely well.

Safety, Affordability, and New public transit options have significantly grown in their importance since 2021. Other priorities remain comparable to 2021.

Importance Over Time in Regional Transportation Priorities - TOP 3 BOX SCORE*

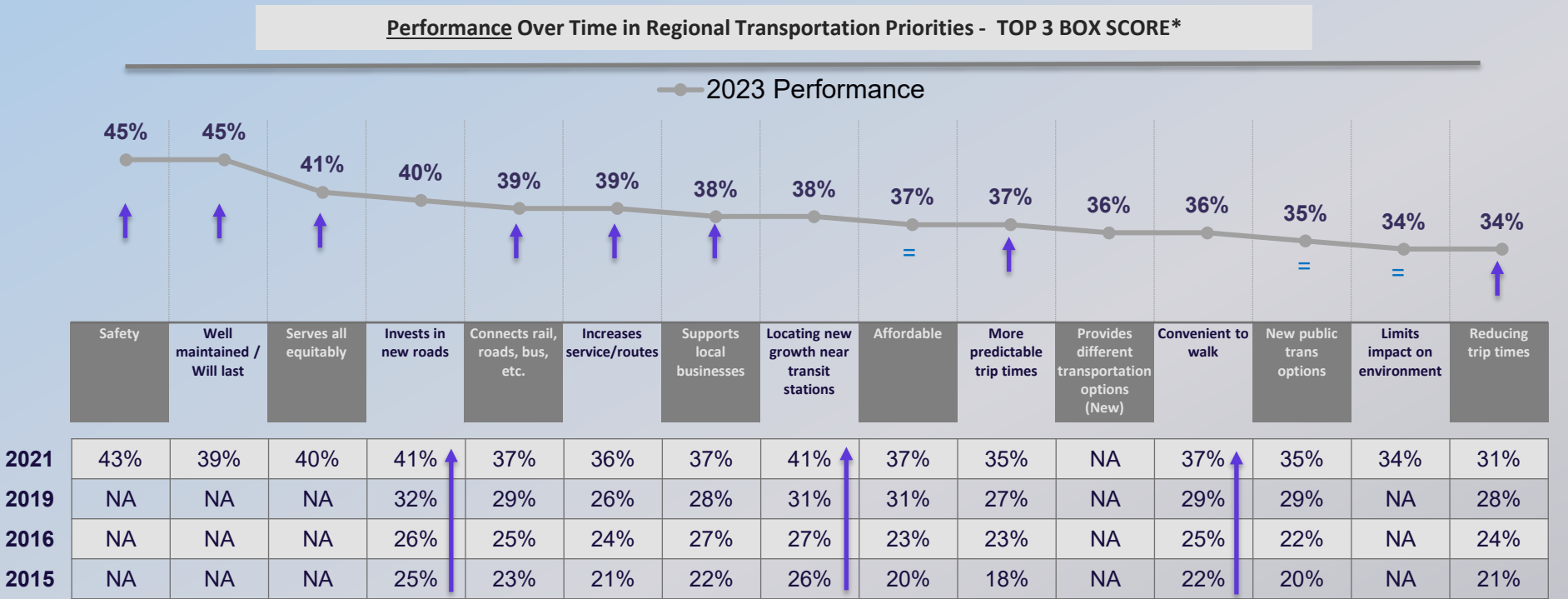


* % rating each 8-10 on 10-pt scale

BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616, 2021 n=611, 2023 n=606)
Q600. Thinking specifically about transportation issues and priorities, please rate each of the following where 1 means "Not at all important to the future of the region" and 10 means "Extremely important priority for the future of the region."

Denotes statistically significant differences between 2021 and 2023 (p<.05)

Performance ratings tend to be as good or better to 2021 for most priorities.



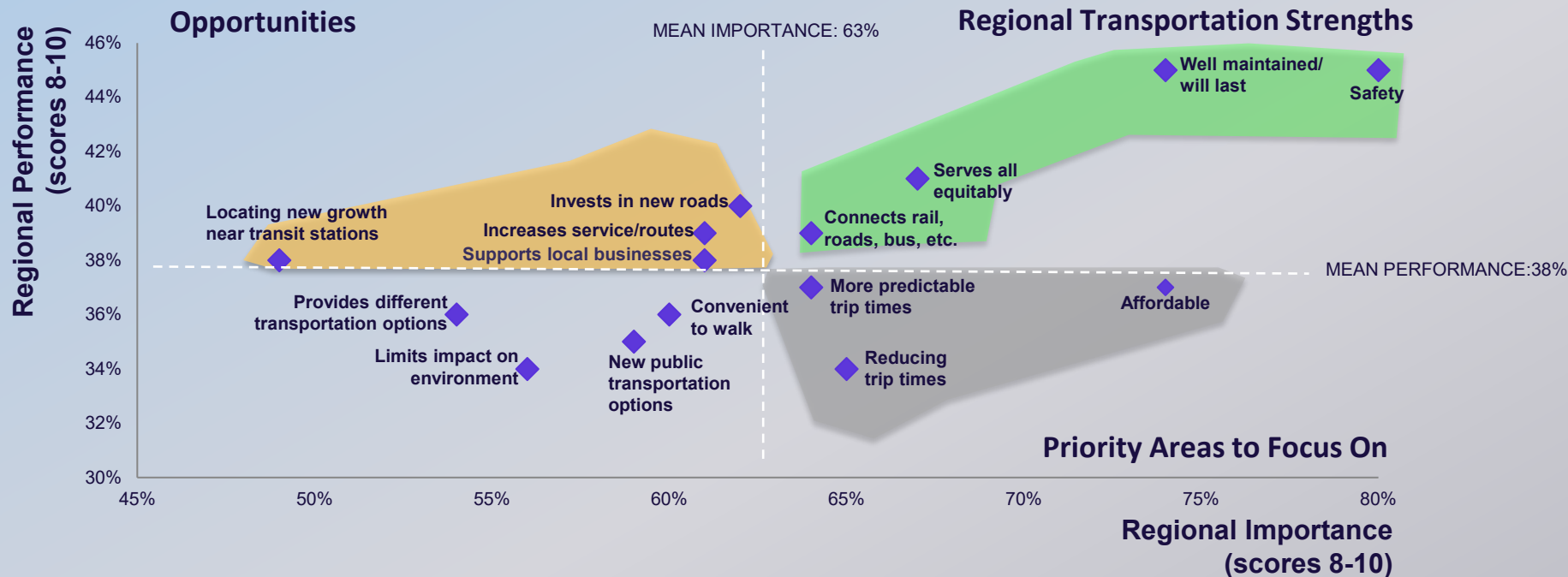
* % rating each 8-10 on 10-pt scale

BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616, 2021 n=611, 2023 n=606)
Q605. Please indicate how well you think Northern Virginia is performing on each of these priorities using the scale where 1 means the region is not performing well at all and 10 means the region is performing extremely well.

⚡ Denotes statistically significant differences between 2021 and 2023 (p<.05)
↑ Arrows show directional increases

Safety, Equitable access, Connection, and Longevity remain current regional transportation strengths. The priority areas to strengthen performance relate to *Affordability, Reducing trip times* and making them more *Predictable*.

2023: Importance vs. Performance



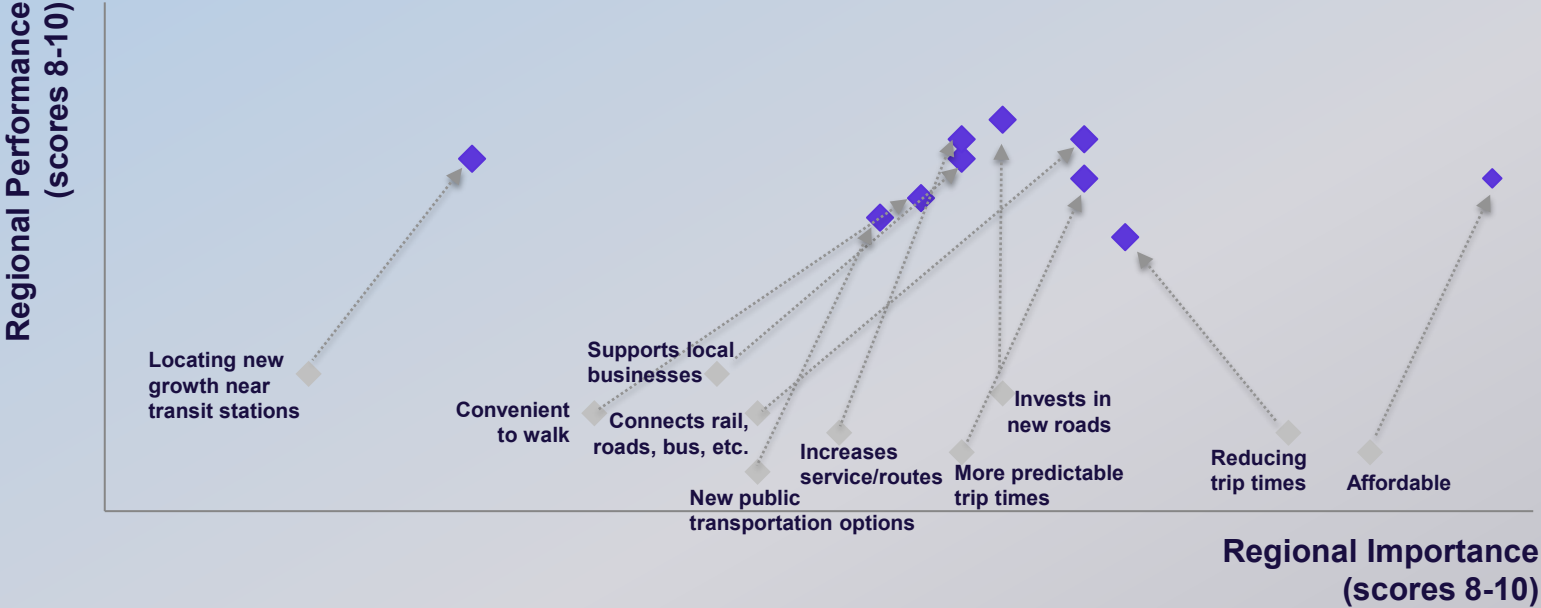
BASE: ALL RESPONDENTS (2021 n=611, 2023 n=606)

Q600. Thinking specifically about transportation issues and priorities, please rate each of the following where 1 means "Not at all important to the future of the region" and 10 means "Extremely important priority for the future of the region."

Q605 Please indicate how well you think Northern Virginia is performing on each of these priorities using the scale where 1 means the region is not performing well at all and 10 means the region is performing extremely well.

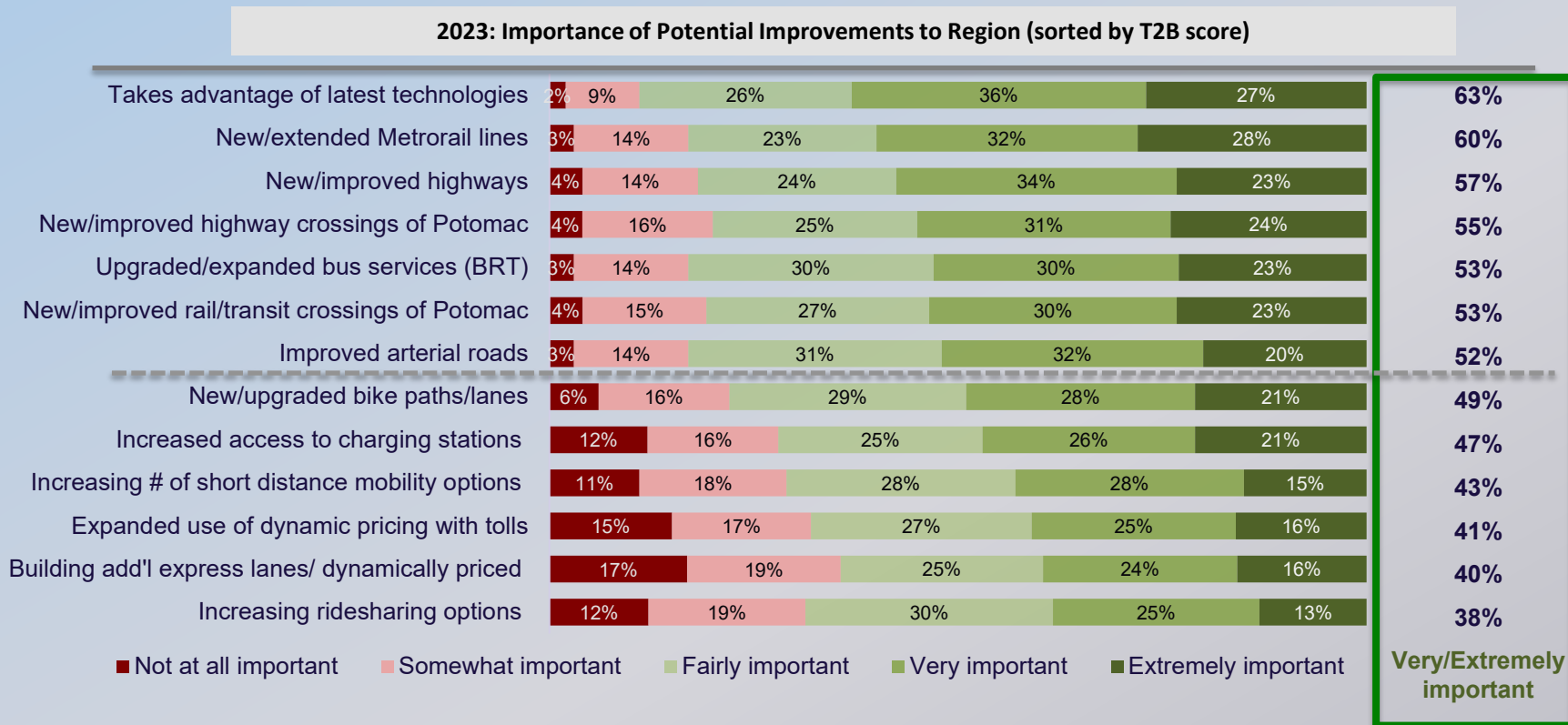
Most of the movement in priorities comes from shifts in improved performance (items are moving higher on chart) as compared to the 2015 benchmark. Affordability shows a noticeable jump in performance, while reduced trip times shows the only decline.

2015 vs. 2023: Importance vs. Performance



BASE: ALL RESPONDENTS (2021 n=611, 2023 n=606)
Q600. Thinking specifically about transportation issues and priorities, please rate each of the following where 1 means "Not at all important to the future of the region" and 10 means "Extremely important priority for the future of the region."
Q605 Please indicate how well you think Northern Virginia is performing on each of these priorities using the scale where 1 means the region is not performing well at all and 10 means the region is performing extremely well.

The most important potential improvements include leveraging technology, while making improvements to Metro & highways as well as offering expanded BRT.



BASE: ALL RESPONDENTS (2023 n=606)

Q620B. Now, thinking about potential projects and improvements in the region, please indicate how important you think each one is.



Denotes statistically significant differences between 2021 and 2023 ($p < .05$)

The most important potential improvements since previous year include leveraging technology, and improved highway crossings of Potomac.

Historical Comparison of Potential Improvements to Region <i>Rated Very/Extremely Important</i>			
	2019	2021	2023
Takes advantage of latest technologies	NA	58%	63%
New/extended Metrorail lines	61%	59%	60%
New/improved highways	55%	55%	57%
New/improved highway crossings of Potomac	51%	50%	55%
Upgraded/expanded bus services (BRT)	53%	57%	53%
New/improved rail/transit crossings of Potomac	51%	53%	53%
Improved arterial roads	51%	53%	52%
New/upgraded bike paths/lanes	34%	50%	49%
Increased access to charging stations	NA	48%	47%
Increasing # of short distance mobility options	NA	41%	43%
Expanded use of dynamic pricing with tolls	32%	39%	41%
Building add'l express lanes/ dynamically priced	NA	38%	40%
Increasing ridesharing options	NA	39%	38%

BASE: ALL RESPONDENTS (2023 n=606)

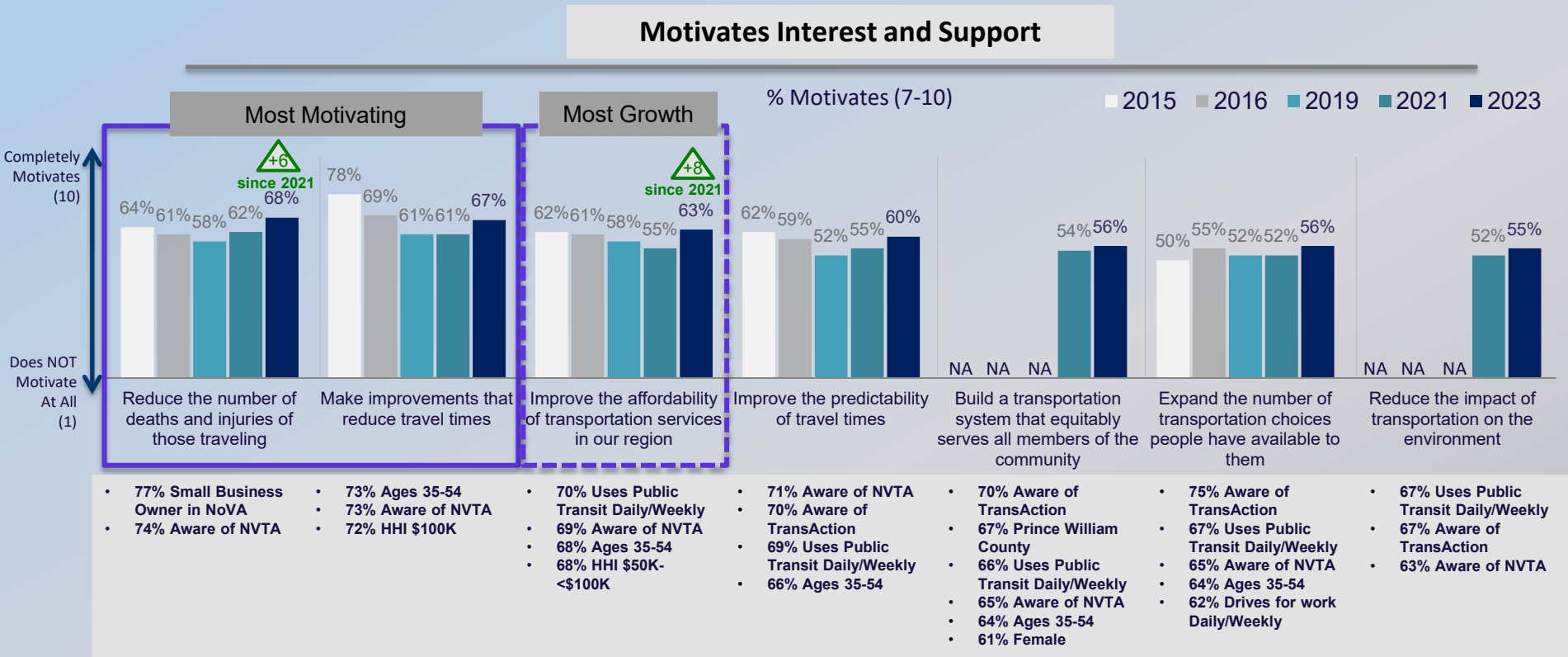
Q620B. Now, thinking about potential projects and improvements in the region, please indicate how important you think each one is.



Denotes statistically significant differences between 2021 and 2023 (p<.05)

Transportation MESSAGING

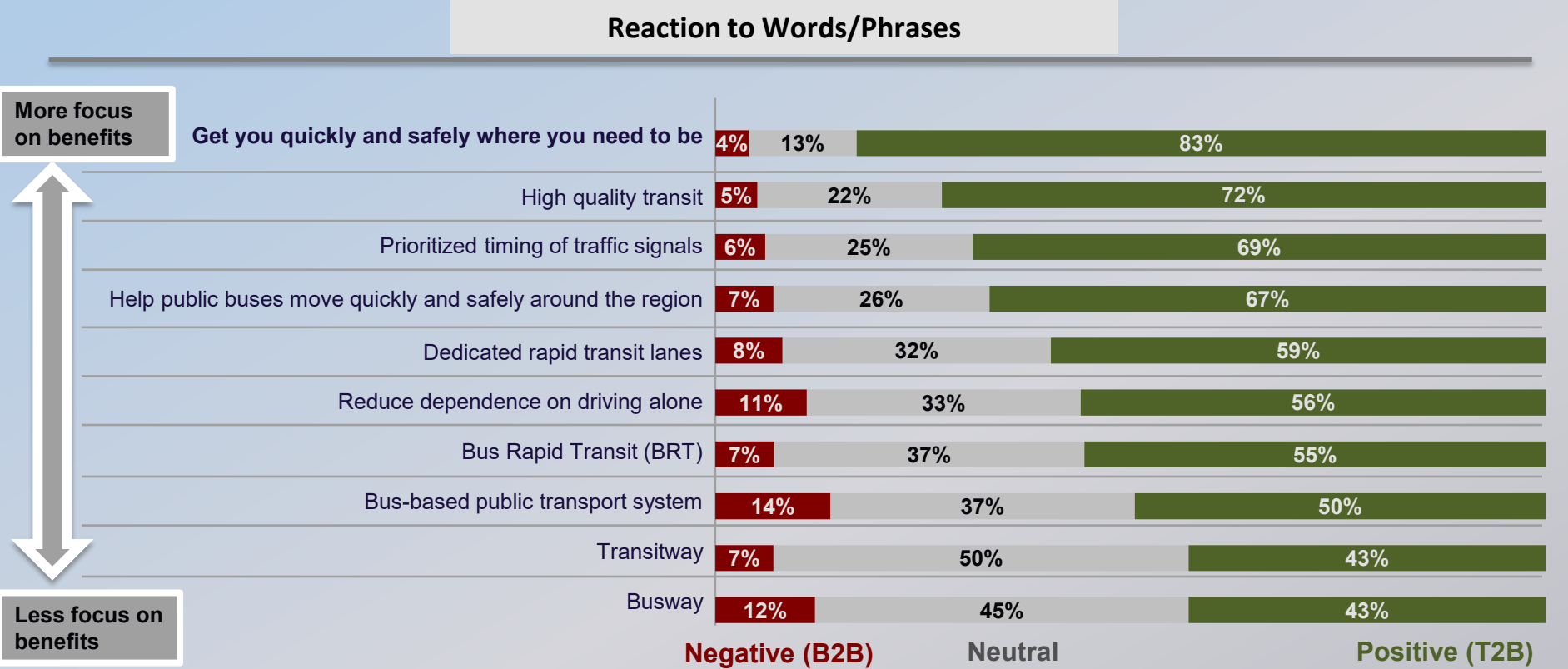
Messaging should center on benefits tied to safety and reduced travel times. Affordability concerns has grown in more than any other theme and should also be considered.



BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616, 2021 n=611, 2023 n=606)
Q705. The following are strategies to help fulfill the regional values and priorities we have been talking about. There are different ways to talk about these priorities and goals. Please indicate the degree to which the goal captures and motivates your interest and support by rating the statements from 1 to 10 where 1 means "does not motivate your interest and support at all" and 10 means "completely motivates your interest and support".

Denotes statistically significant differences between 2021 and 2023 (p<.05)

Word choice matters when talking about transportation solutions. When transportation words/phrases are connected to personal benefits, they are much more positively received.



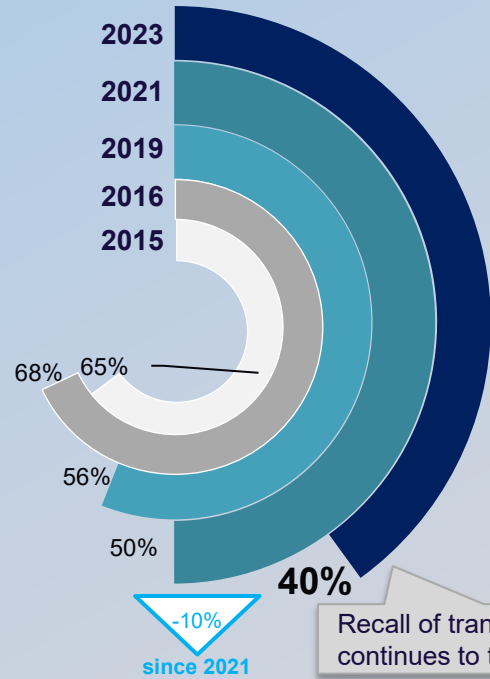
BASE: ALL RESPONDENTS (2023 n=606)
Q730. There are lots of different words and phrases that are used when discussing transportation options, their features and benefits. For each of the following words or phrases, please indicate if you have a positive, negative, or neutral feeling.

Transportation

NEWS RECALL

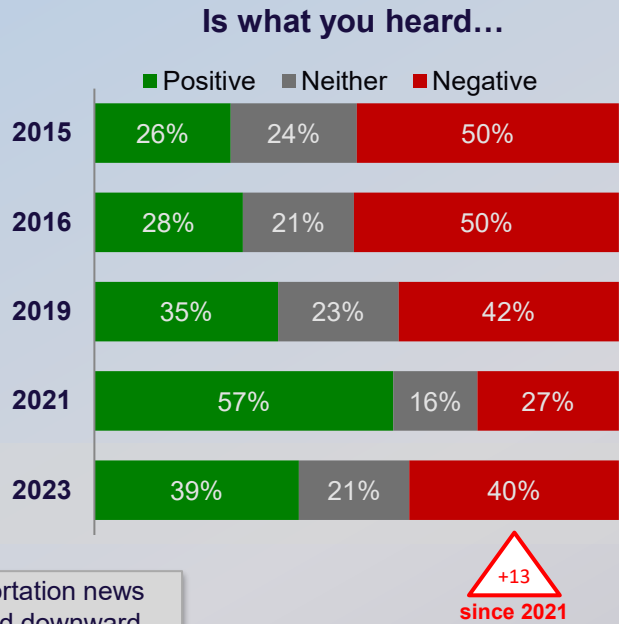
Recall of transportation related news continues to decrease. The ratio of positive to negative news falls back to 2019 levels.

Heard Something Recently



Recall of transportation news continues to trend downward

Top-of-Mind Transportation Issues



Most Likely to Hear Something *Positive* in 2023: 39% TOTAL

- 64% Aware of TransAction
- 56% High School degree or less
- 56% Loudoun County
- 48% Ages 35-54
- 48% Aware of NVTA
- 46% Male
- 46% Married/Living with partner

Most Likely to Hear Something *Negative* in 2023: 40% TOTAL

- 62% Work in DC
- 51% Ages 18-34
- 47% Not aware of NVTA
- 45% Prince William County

BASE: : ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616, 2021 n=611, 2023 n=606)
Q400. What, if anything, have you heard, read or seen recently regarding transportation issues, actions or news in the Northern Virginia region?
BASE: HEARD, READ, SEEN TRANSPORTATION ISSUES (2023 n=245); Consider it Positive 2023 (n=96), Consider it Negative 2023 (n=97)
Q405. Would you consider what you have heard, read, or seen positive or negative?

Denotes statistically significant differences between 2021 and 2023 (p<.05)

Transportation news most commonly recalled relates to Metro/WMATA, but also includes news about congestion, roadways, tolls and buses.

Positive

30% Metro/WMATA Expansion

- Expansion of the metro/stations (Ashburn, Potomac Yard, Tysons Corner, etc.)
- Opening of the Silver Line

20% Improved roads

- The expansion of roads to reduce congestion
- Widening the roads that are heavily populated (Route 28, I-64, I-66, Route 15N)
- Reopening of roads (US 340)
- Reconstruction for increased accessibility for pedestrians/bike lanes
- Increased funding for road improvements (I-95 corridor, US Highway 1, Route 28, bridges, rotaries, etc.)

14% Reduced congestion

- Reduced congestion by added express lanes/widened roads/tolls during rush hour (Centreville Road, I-95, DC Metroplex, and DMV area in general)
- Saturday service of VRE to ease traffic
- People working remote results in reduced traffic

10% Bus Expansion

- Expansion of bus lines
- Fairfax Connector adding electric busses

8% I-66 Improvements

- Extension of express lanes
- Completion of I-66 projects

Negative

55% Metro/WMATA Issues

- Funding for the metro system
- Reduced metro service (service hours, scheduling, reduced routes, delays, etc.)
- Increased crime at stations/stops
- Metro repairs/broken trains (derailment)
- Increased fee/fare
- Decreased ridership
- Metro rail expansion delays
- Transit worker strikes

31% Traffic Congestion

- Heavy traffic/Rush hour/Traffic jams
- Accidents
- Congestion due to drivers trying to avoid toll lanes
- Number one worst traffic in the country

15% Road closures/Construction delays

- Construction causing accidents and delays/congestion
- Road closures (roads not finished in Arlington)

10% Increased tolls

- Toll fees/EZ pass increasing
- Overpriced express lanes

The decline in recall is further reflected in specific channels. TV/News remains the dominant source followed by social media and print sources.

Most Recent Information Sources for Transportation Issues

	2015 (n=400)	2016 (n=411)	2019 (n=363)	2021 (n=311)	2023 (n=245)		Source	2021	2023
 Television/News story	54%	57%	49%	58%	46%	 -12 since 2021	 Facebook	32%	22%
 Social Media	24%	31%	38%	49%	36%	 -13 since 2021	 X (Twitter)	24%	14%
 Print article or ad In newspaper, magazine, flyer or information packet	46%	45%	36%	34%	28%		 Instagram	24%	NA
 Radio ad/news/discussion	41%	38%	32%	36%	27%	 -9 since 2021	 LinkedIn	NA	4%
 Community Meeting	7%	9%	10%	21%	11%	 -10 since 2021	 Other social media	8%	11%
 Website	5%	2%	4%	7%	9%		Other Sources Mentioned in 2023		
							• Personal experience 5% • Word of mouth 3%		
							Websites Mentioned in 2023		
							• ArlNow.com • WashingtonPost.com		

BASE: HEARD, READ, SEEN TRANSPORTATION ISSUES (2015 n=400, 2016 n=411, 2019 n=363, 2021 n=311, 2023 n=245)
Q410. Where did you hear or see this information? Choose all that apply.

 Denotes statistically significant differences between 2021 and 2023 (p<.05)

Social media is an effective channel to reach younger residents along with people who are more engaged with public transportation.

More Likely to Use Social Media



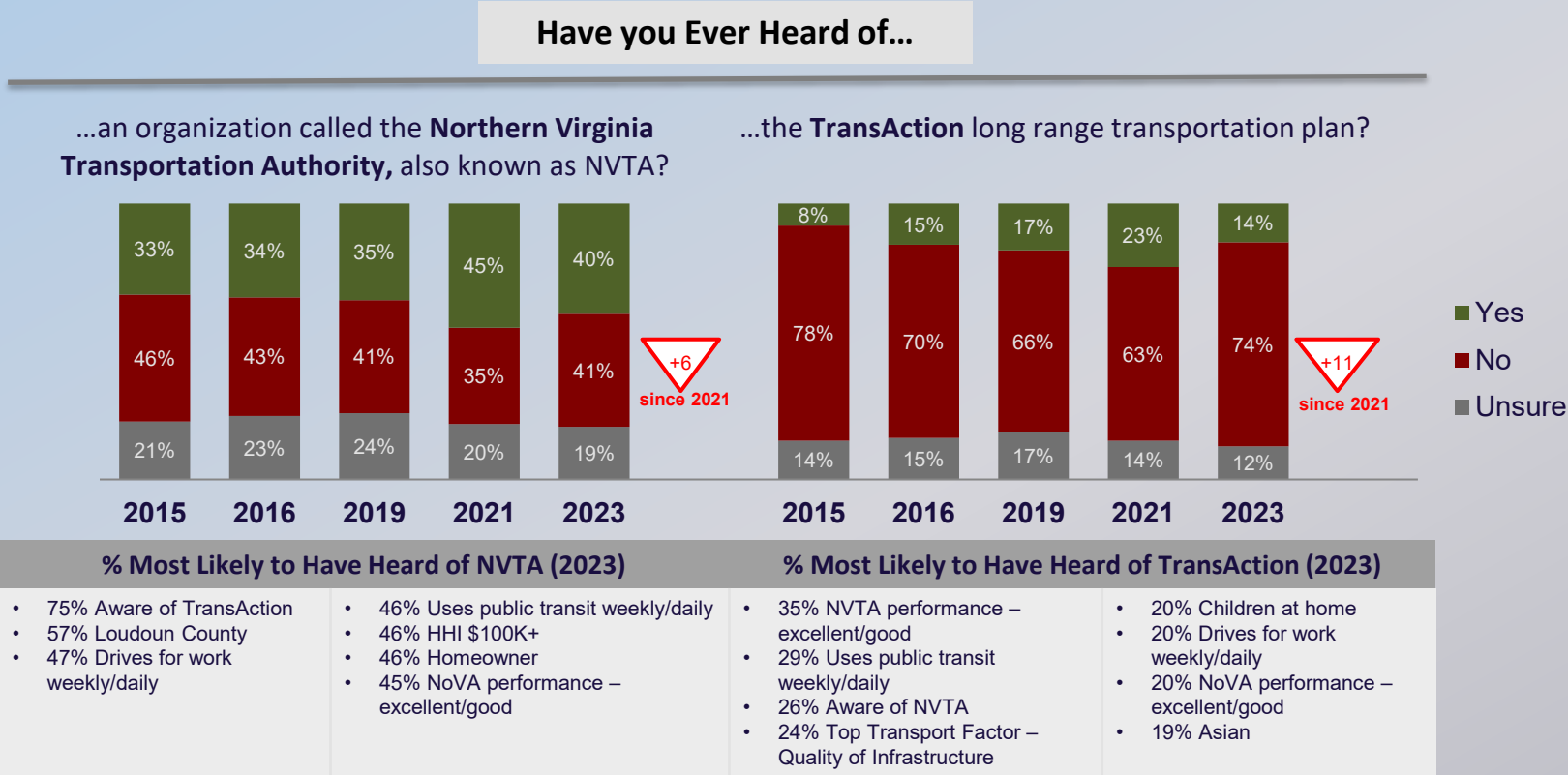
36% TOTAL

- 59% Lived in region 5 years or less
- 58% Ages 18-34
- 57% Aware of TransAction
- 54% Uses public transport weekly/daily
- 51% HHI \$50-\$100K
- 48% Hispanic
- 48% Lived in region 6-10 years
- 46% HHI <\$50K
- 46% Renter
- 45% Single
- 45% Children at home
- 44% Drives for work weekly/daily
- 44% Live and work in same region
- 41% Employed/Student

Transportation

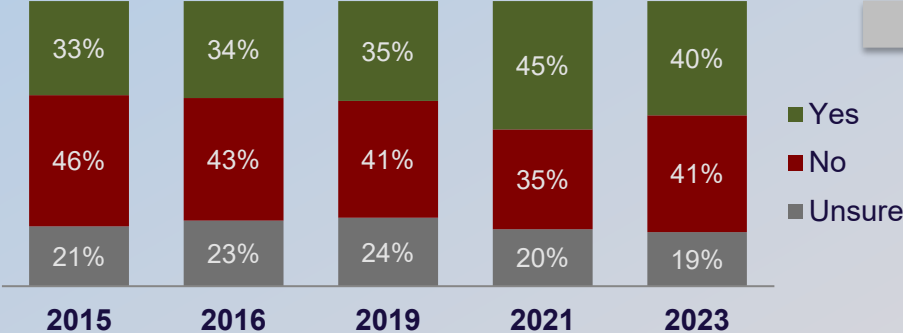
**AWARENESS LEVELS AND
PERFORMANCE RATINGS FOR THE
REGION AND REGIONAL AGENCIES**

Awareness of NVTA and TransAction has softened after seeing a steady increase from 2016-2021.

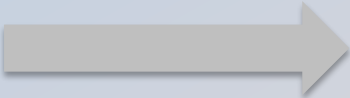


Levels of familiarity with NVRTA (among those who are aware) are fairly stable and tend to be limited to name recognition.

Have you Ever Heard of...



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



Familiarity with NVRTA
(among those who are aware)



BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616, 2021 n=611, 2023 n=606)
Q417. Have you ever heard of an organization called the Northern Virginia Transportation Authority also known as NVRTA?
BASE: AWARE OF NVRTA (2021 n=283, 2023 n=243)
Q417b. How familiar are you with the Northern Virginia Transportation Authority?

While *Excellent* scores declined, the region and NVTA are both historically highest for *Good/Excellent* for performance in planning and implementing transportation solutions. Scores are highest among residents using public transit frequently (81%).

Performance on Planning and Implementing Transportation Solutions



Northern
VA region



NVTA
(Among those
aware of
NVTA)

	Poor/Fair	Poor	Fair	Good	Excellent	Good/Excellent
2015	73%	22%	51%	25%	2%	27%
2016	70%	15%	55%	26%	4%	30%
2019	61%	13%	48%	34%	5%	39%
2021	52%	12%	40%	35%	12%	48%
2023	49%	8%	41%	44%	7%	51%
2015	65%	17%	48%	32%	3%	35%
2016	66%	17%	49%	28%	6%	34%
2019	53%	9%	44%	31%	16%	47%
2021	42%	12%	31%	35%	23%	58%
2023	41%	7%	34%	47%	12%	59%

NOVA Region Performance, those rating it higher (as good/excellent) (2023):

51% - Total

- 74% Aware of TransAction
- 72% Uses Public Transit weekly/daily
- 69% Never drives for work
- 64% Loudoun County
- 58% Ages 35-54
- 58% Aware of NVTA
- 57% Alexandria
- 57% Live and work in same region
- 57% Uses public transit (NET Yes)

NVTA Performance, those rating it higher (as good/excellent) (2023):

59% - Total

- 81% Uses public transit weekly/daily
- 80% Asian
- 80% Alexandria
- 79% Aware of TransAction
- 72% Ages 35-54
- 70% High School degree or less
- 69% Arlington County
- 65% Married/Living with partner
- 65% Live and work in same region
- 64% Loudoun County

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

BASE: ALL RESPONDENTS (2015 n=610, 2016 n=606, 2019 n=616, 2021 n=611, 2023 n=606)

Q630. How would you rate the performance of Northern Virginia region when it comes to planning and implementing transportation solutions in the region?

BASE: HAVE HEARD OF NVTA (2015 n=207, 2016 n=212, 2019 n=222, 2021 n=276, 2023 n=243)

Q645. How would you rate the performance of Northern Virginia Transportation Authority (NVTA) when it comes to planning and implementing transportation solutions in the region?



Denotes statistically significant differences between 2021 and 2023 (p<.05)

Conclusions + Opportunities



Conclusions + Opportunities

Transportation is an important factor shaping quality of life and most believe investing in regional transportation is a priority. Recall of transportation content in the news has declined and awareness of NVTA and TransAction have softened (after seeing a sustained growth trend over several years).

Consider additional opportunities to partner with other agencies to help promote progress on on-going transportation initiatives (and the role NVTA plays). One potential strategy is to enhance communications to embrace how transportation is linked to other regional priorities - affordability, safety, access to healthcare.



Conclusions + Opportunities

Safety and well being are foundational to having a thriving region. Crime is featured prominently in the media and is a growing concern in the region and impacts quality of life. This increased attention on personal security elevates focus on safety more broadly. Safety has always been and continues to be a top priority for transportation.

Reinforce existing commitment to safety when creating new transportation solutions. When updating the public on transportation projects, highlight the specific ways new offerings will make our region a safer place to travel.



Conclusions + Opportunities

Work and commuting habits remain impacted by the post-pandemic shift to working from home. Most residents are back in the office and traveling for work at least a few times a week. Travel for non-work purposes is even more common.

Residents are still driving frequently. Decreases in work related driving may be offset to some extent by increased driving for non-work-related purposes. This means traffic is still a concern and the region needs to continue to find ways to ease congestion.



Conclusions + Opportunities

Despite low levels of familiarity with BRT –residents have more favorable than negative views. There is evidence of interest in having access to expanded BRT transportation options. Highlighting specific benefits will be helpful to influence usage.

Promote the benefits of BRT as a transportation option in the region. The most influential benefits found in the survey are convenience (it is accessible and easy to use); efficient (fast – speed comparable to driving, more frequent service), and reliable (this can be helpful in offsetting the variable of time in traffic). Also consider including any relevant safety benefits.

Appendix

DEMOGRPAHICS AND ADDITIONAL SLIDES

Demographics

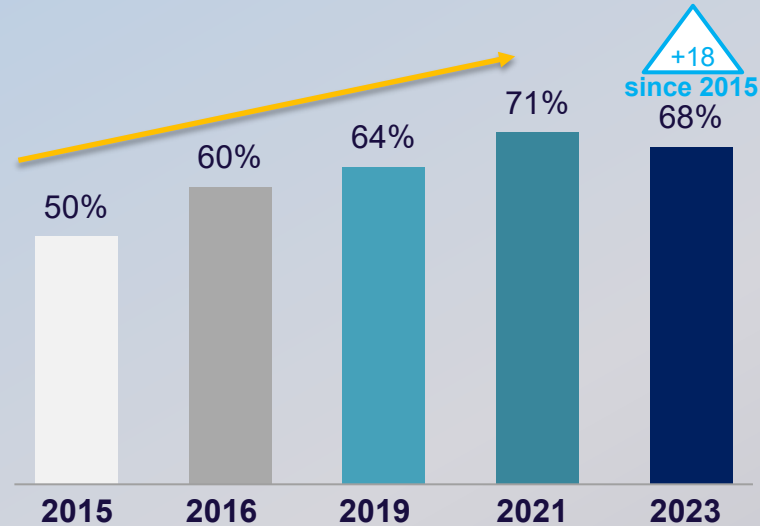
		2015	2016	2019	2021	2023
Gender	Male	48%	48%	47%	48%	49%
	Female	52%	52%	53%	52%	51%
Age	18-24	7%	11%	15%	13%	12%
	25-34	22%	22%	22%	21%	22%
	35-44	24%	21%	21%	25%	21%
	45-54	20%	21%	15%	12%	18%
	55-64	15%	14%	15%	15%	14%
	65+	12%	11%	13%	14%	13%
Ethnicity	White	58%	58%	52%	52%	53%
	Hispanic	15%	15%	17%	17%	17%
	Black	11%	11%	12%	12%	12%
	Asian	14%	14%	15%	15%	15%
	Hawaiian/Pacific Islander	<1%	<1%	<1%	<1%	<1%
	Native American/Alaskan native	<1%	<1%	<1%	<1%	<1%
	Multi-race	2%	2%	4%	4%	3%
	Other	<1%	<1%	<1%	<1%	<1%
Marital	Married/Civil Union	60%	56%	51%	52%	48%
	Single, never married	24%	32%	31%	29%	32%
	Divorced/Separated/Widowed	11%	14%	12%	10%	11%
	Living with Partner	5%	3%	6%	5%	7%
	Decline to answer	<1%	<1%	<1%	<1%	1%

		2015	2016	2019	2021	2023
Education	HS or less	5%	7%	13%	15%	11%
	Some college	15%	14%	16%	14%	14%
	Associates Degree	6%	6%	7%	7%	9%
	Bachelor's Degree	35%	37%	31%	30%	35%
	Master's Degree	28%	27%	25%	24%	23%
	Professional Degree	7%	5%	4%	6%	5%
	Doctorate Degree	4%	4%	4%	4%	3%
	Decline to answer	<1%	<1%	<1%	1%	<1%
Employment	Employed (NET)	73%	72%	71%	71%	70%
	Full-time	64%	58%	55%	59%	55%
	Part-time	5%	9%	11%	8%	8%
	Self-employed	4%	5%	6%	4%	6%
	Not employed (NET)	15%	16%	20%	18%	21%
	Not employed, looking	2%	1%	3%	3%	5%
	Not employed, not looking	<1%	1%	1%	1%	1%
	Not employed, unable	<1%	1%	2%	2%	2%
	Retired	13%	13%	14%	12%	14%
	Student	3%	7%	4%	5%	4%
	Stay home spouse/partner	8%	5%	4%	5%	4%
	Decline to answer	<1%	1%	<1%	1%	-
Household Income	<\$50,000	13%	16%	24%	21%	19%
	\$35,000-\$74,999	22%	22%	20%	23%	21%
	\$75,000-\$99,999	17%	18%	14%	14%	16%
	\$100,000-\$149,999	25%	21%	19%	18%	21%
	\$150,000-\$199,999	11%	11%	13%	11%	12%
	\$200,000+	11%	10%	13%	19%	13%
	Decline	9%	8%	6%	4%	5%

Slight decrease in the percentage of residents who live/work in the same area post-pandemic.

Live and Work in Same City/County

(Among those Employed or Students)



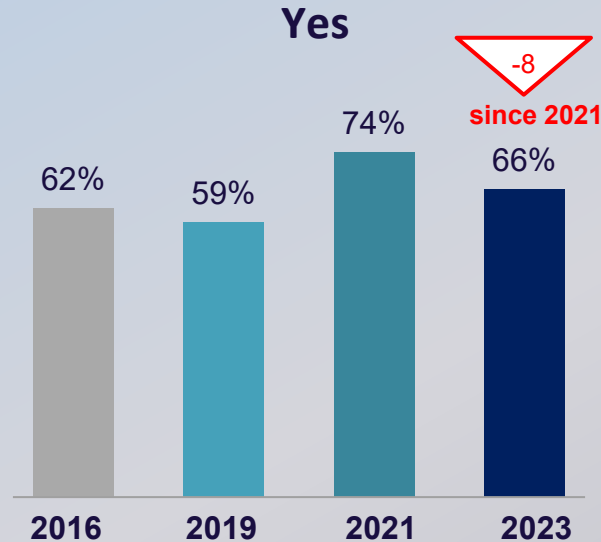
BASE: EMPLOYED OR STUDENT (2015 n=460, 2016 n=470, 2019 n=454, 2021 n=467, 2023 n=446)

Q115. In which county or city do you currently live?

Q142. In which county or city do you currently work or attend school?

Most respondents drive to work (when going to a non-home worksite), but the proportion has softened after peaking in 2021.

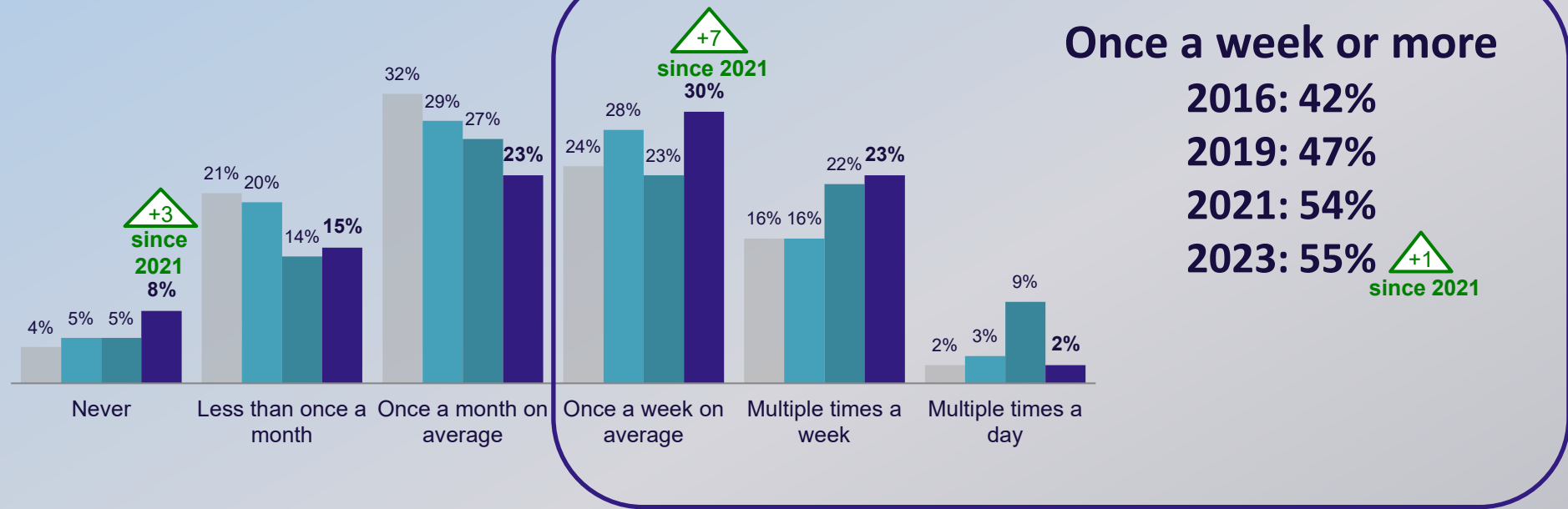
**When you go to a Non-Home Worksite,
do you Drive to Work?**



Over half (55%) of residents continue to shop online at least once a week.



Frequency of Online Shopping



BASE: ALL RESPONDENTS (2016 n=606, 2019 n=616, 2021 n=611, 2023 n=606)

Q750. Many people are taking advantage of online shopping today. Over the past year, how many times have you placed an online order for food or goods to be delivered to your home?



Denotes statistically significant differences between 2021 and 2023 ($p < .05$)