

Community Survey, 2019 Triangle Region

Introduction

- Sample:
 - The sample on which this report is based is a random sample of 1,202 adults in the three county area.
 - The sample is stratified by county. This means that it includes three separate samples, 500 responses from Wake County, 400 from Durham County, and 302 from Orange County.
 - The results are weighted to reflect the different adult (eighteen and older) populations of the three counties for county, age, and sex of the population eighteen years of age or older.
- Difference from passenger surveys
 - Unlike the passenger surveys, the sample used for a community survey is based on a sample of all community households, not transit riders.
 - In a passenger survey all respondents are transit riders and we are more likely to encounter frequent than infrequent riders because they are on the buses more often.
 - A household survey finds mostly non-transit users but when it happens to find transit users, it finds them without regard to the frequency with which they use the buses.

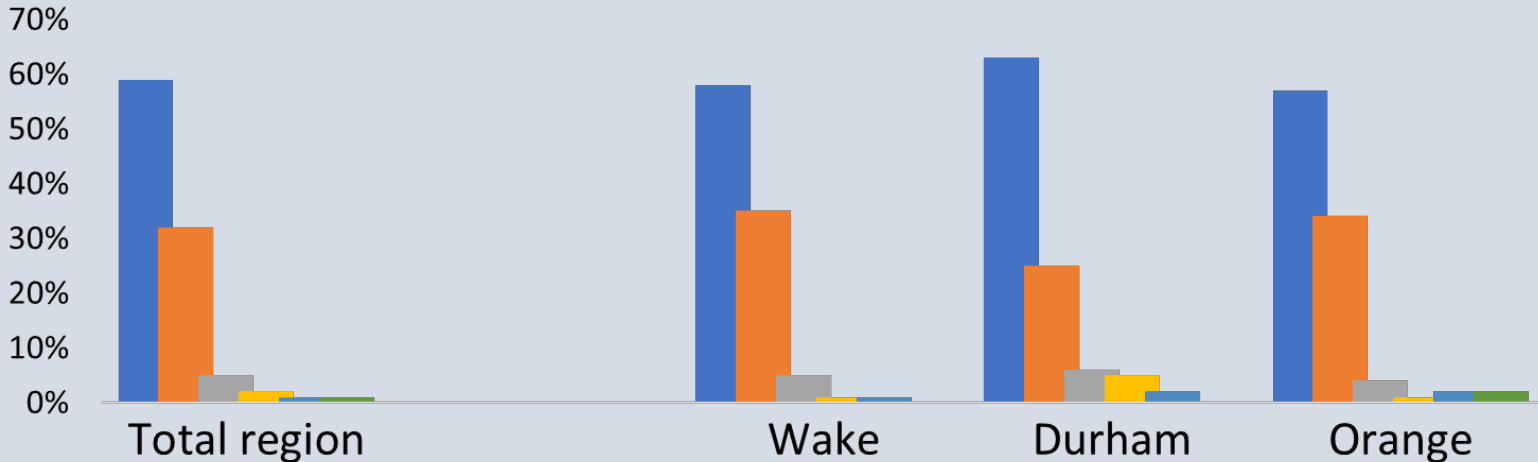
Six Topics Today

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

1. Current Transit Use

Usual Purpose of Most Frequent Local Trip

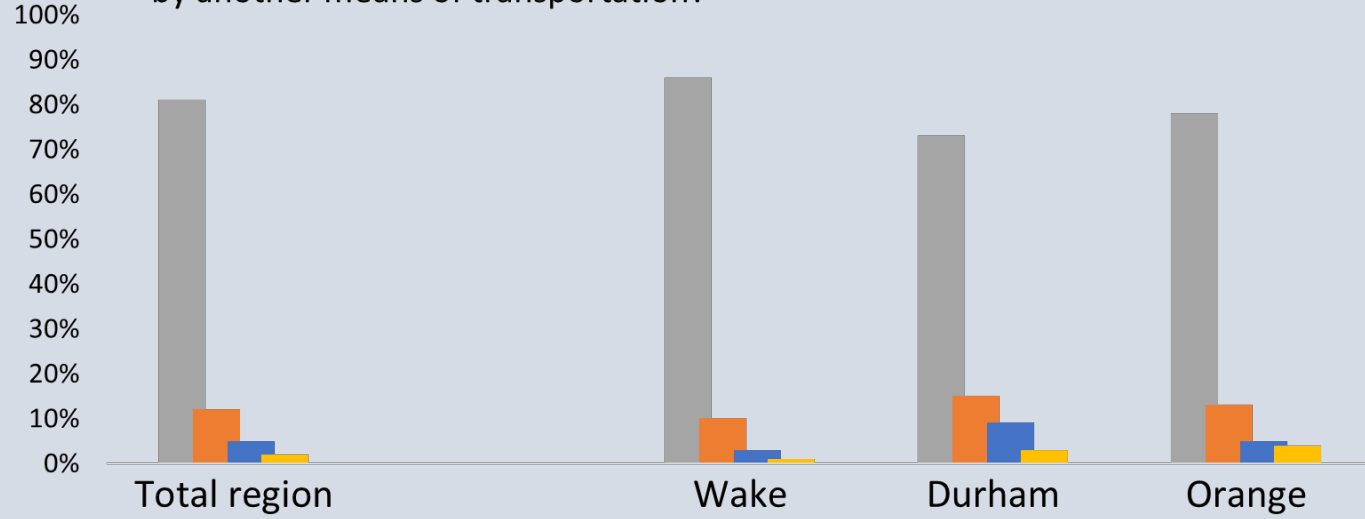
Q3. I'd like you to think for a moment about the local trip you make most often during a typical week. Is that to go to work, go to school, do errands or other purposes?



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

Current Mode Used for Most Frequent Local Trip

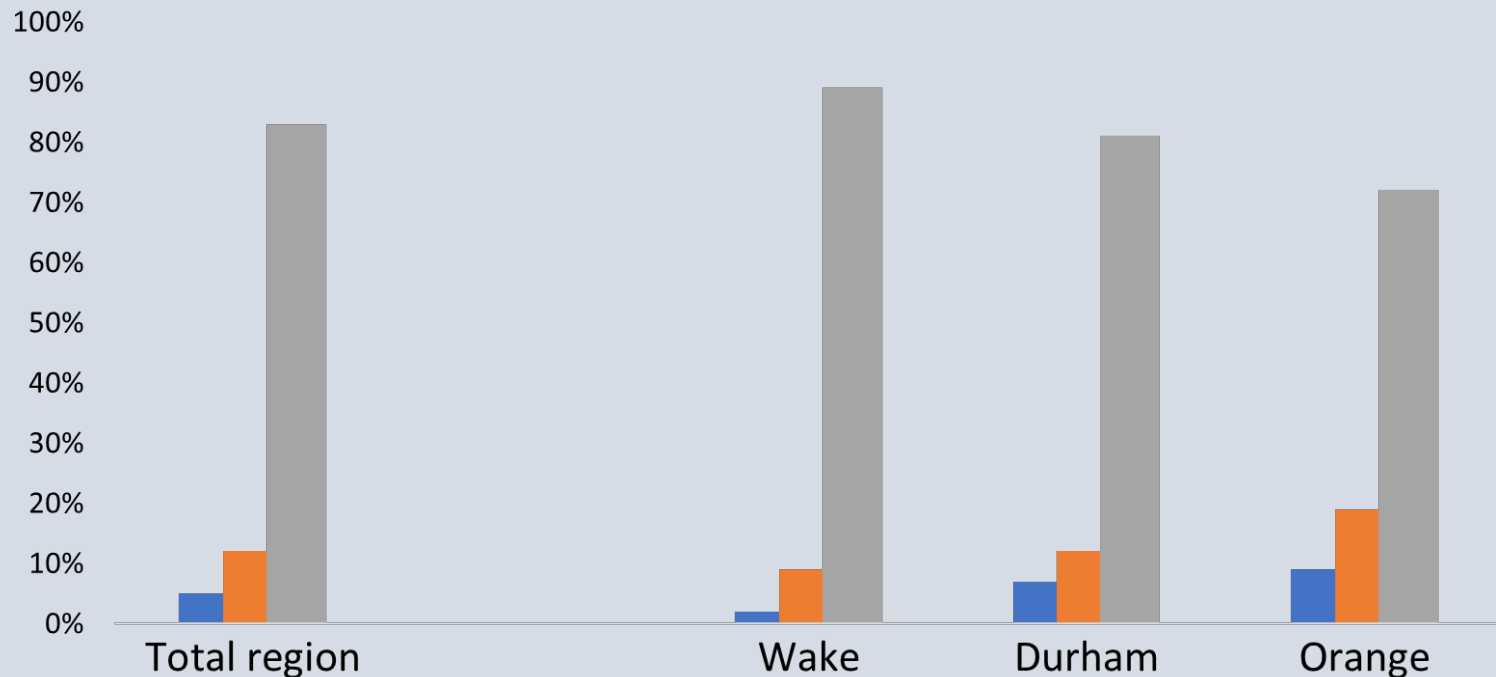
Q4 How have you most often made that trip in the past twelve months? By driving by yourself all the way, by driving with other adults, by using public transit all or part of the way, walking all the way, or by another means of transportation?



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

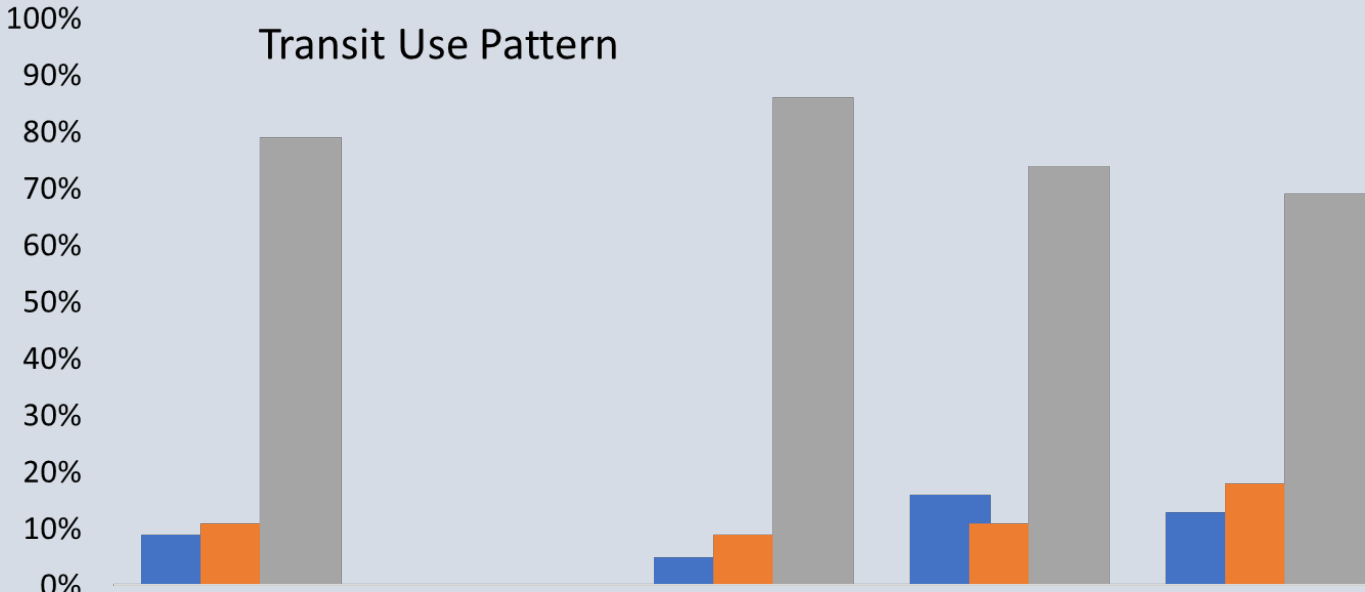
Use of Public Transportation by Those (95%) Who Do Not Use Public Transportation for Their Most Frequent Trip

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



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

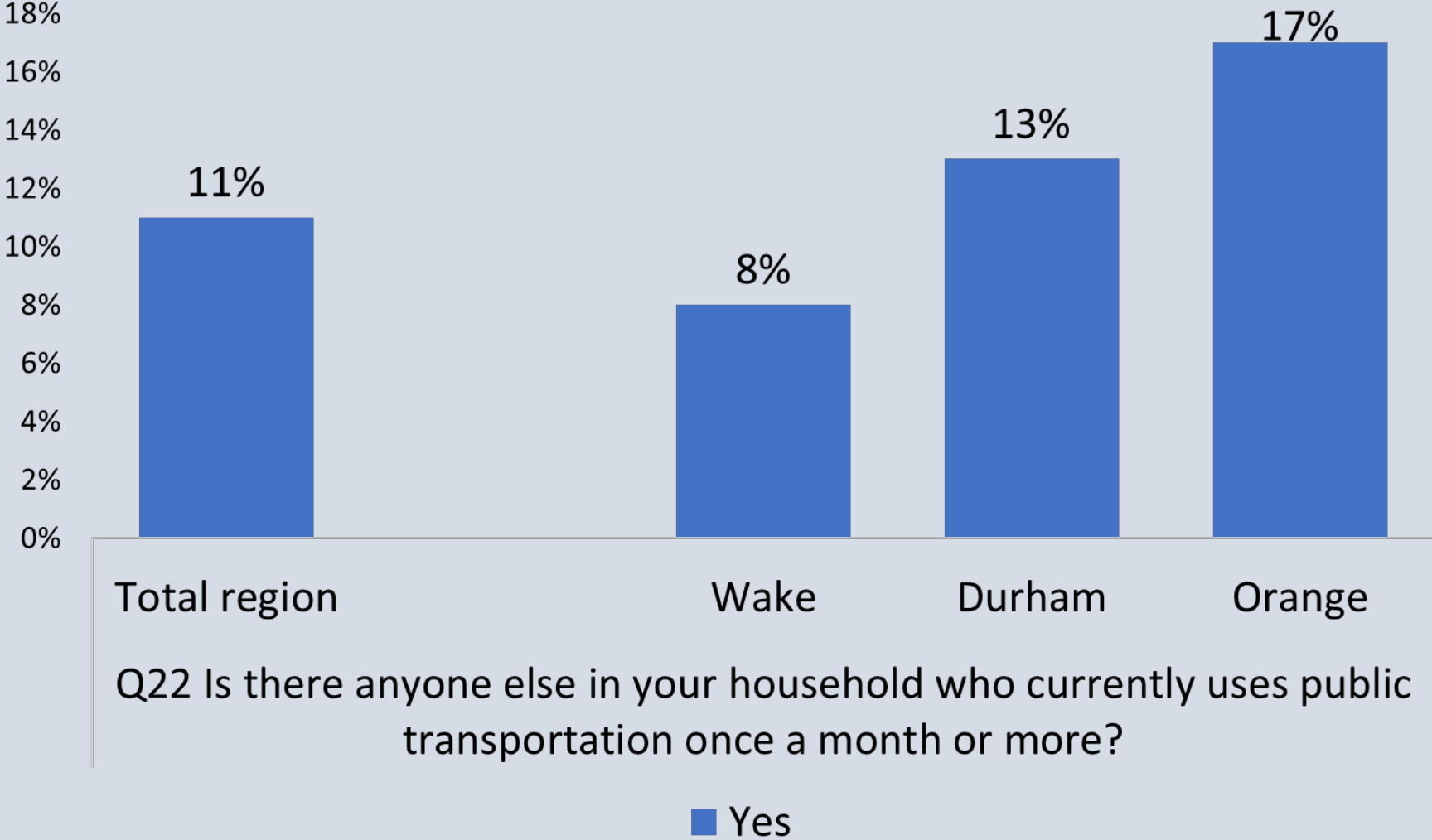
Overall level of Transit Use



- Regular rider (most frequent trip or once month or more)
- Occasional Rider
- Non transit user

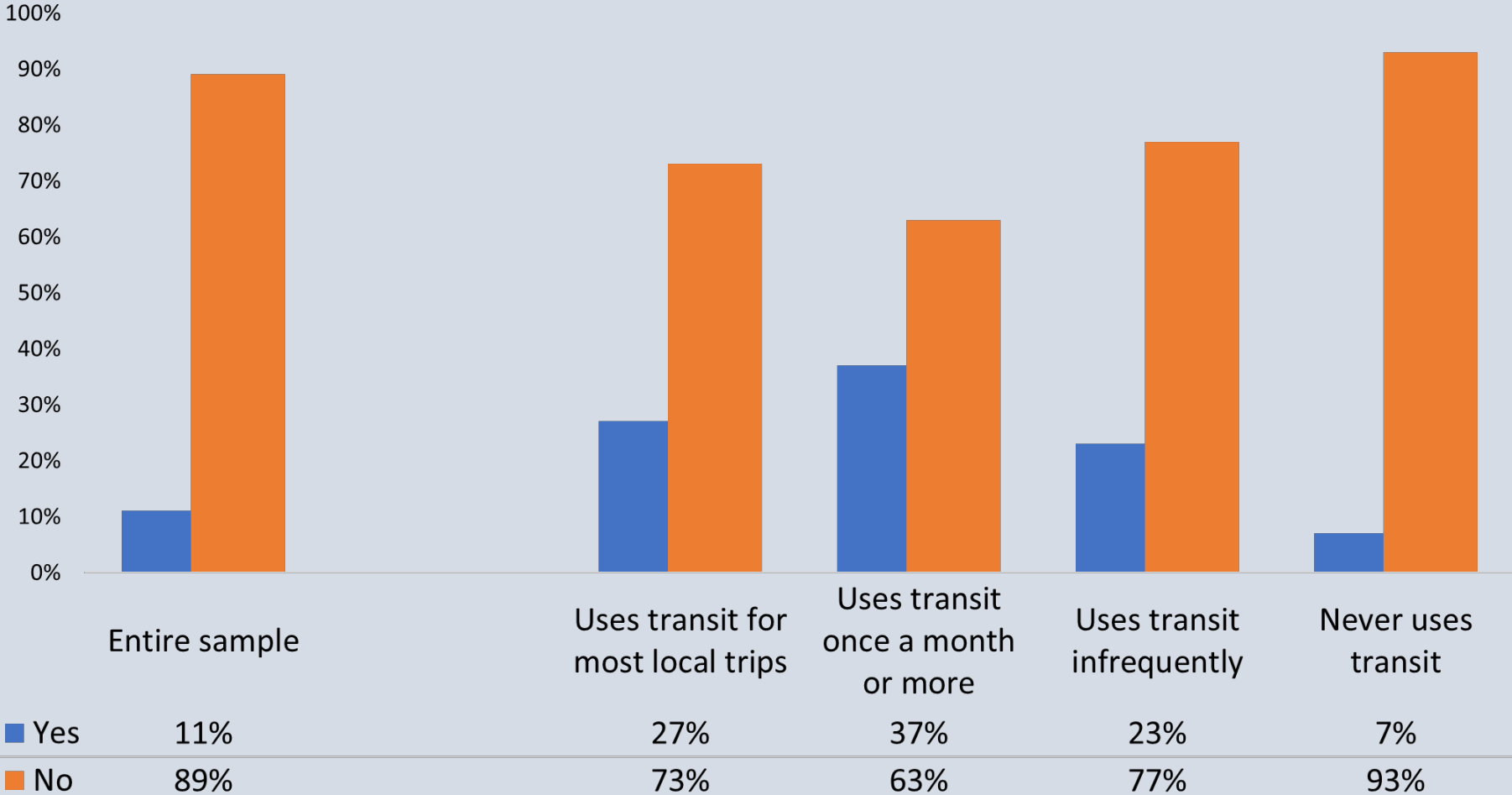
	Entire sample	Wake	Durham	Orange
Regular rider (most frequent trip or once month or more)	9%	5%	16%	13%
Occasional Rider	11%	9%	11%	18%
Non transit user	79%	86%	74%	69%

Other in Household Who Uses Public Transportation



Other in Household Who Uses Public Transportation

Q22 Is there anyone else in your household who currently uses public transportation once a month or more?

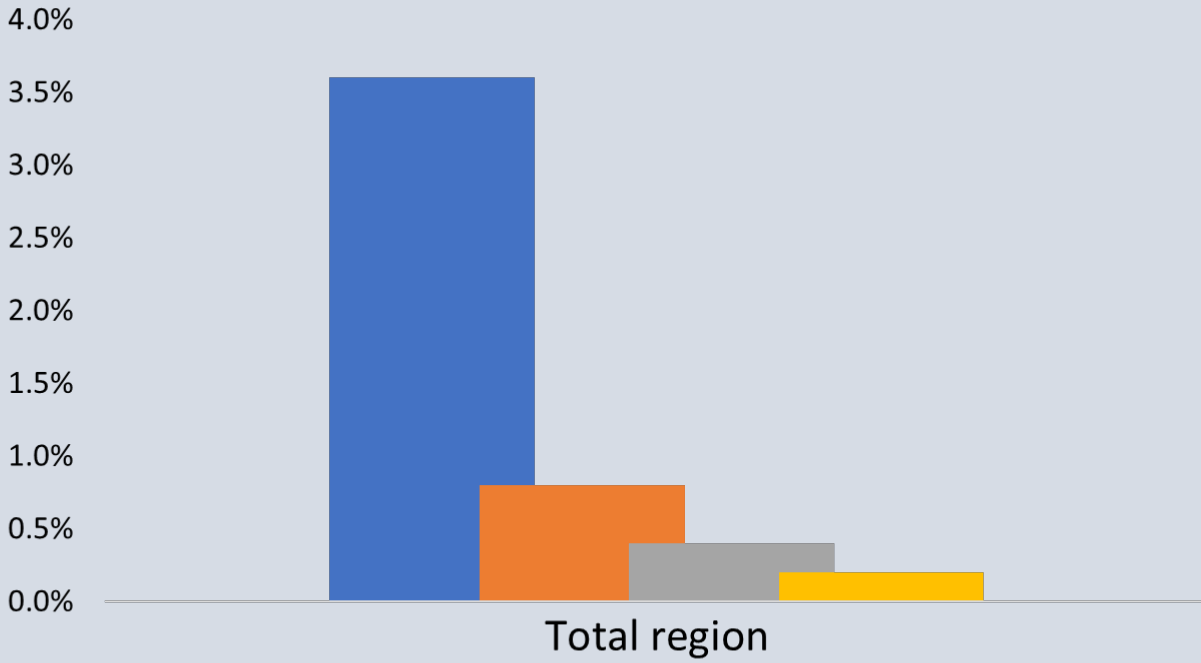


Mode to Stop Among Regular Transit Users

Q4b Mode to Stop among regular transit users only

(5% of sample. The 95% who do not use transit for most frequent local trips are not shown)

Note that since this is a household survey, not a survey of only riders, the data on rider practices such as mode to stop will be very different from the onboard surveys.



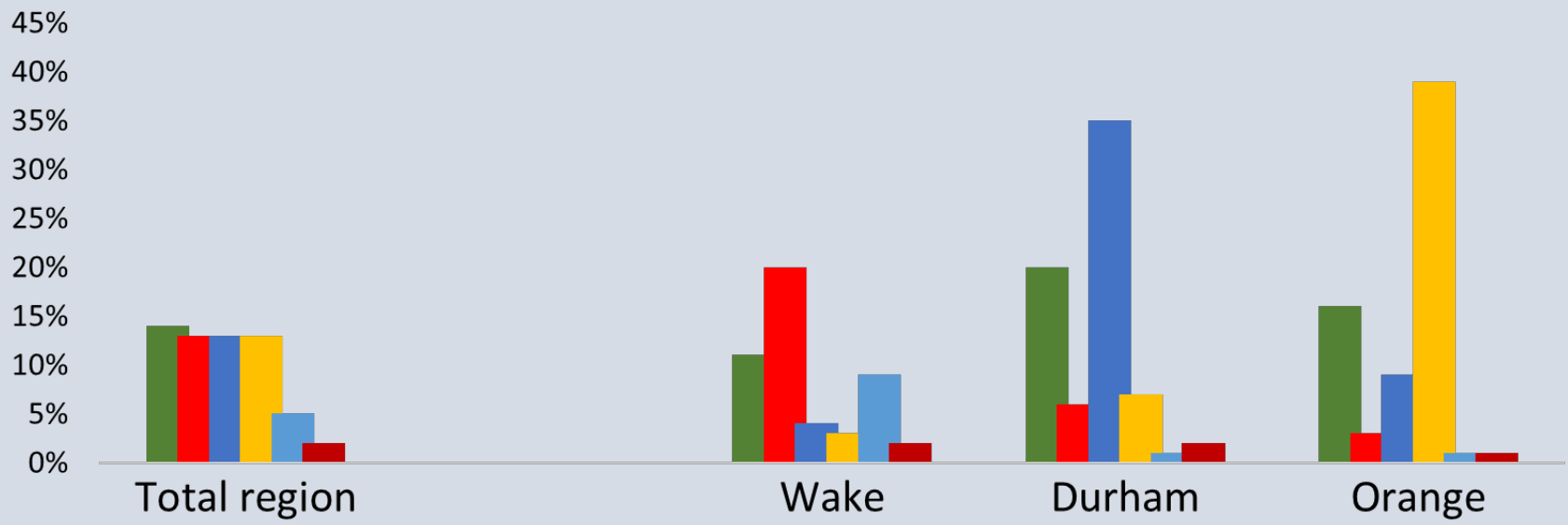
■ Walk	3.6%
■ Use a park and ride	0.8%
■ Dropped off at stop	0.4%
■ Bicycle to stop	0.2%

2. Awareness of Local Transit Systems

Awareness: Unaided Recall of the Names of Local Transit Systems

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

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

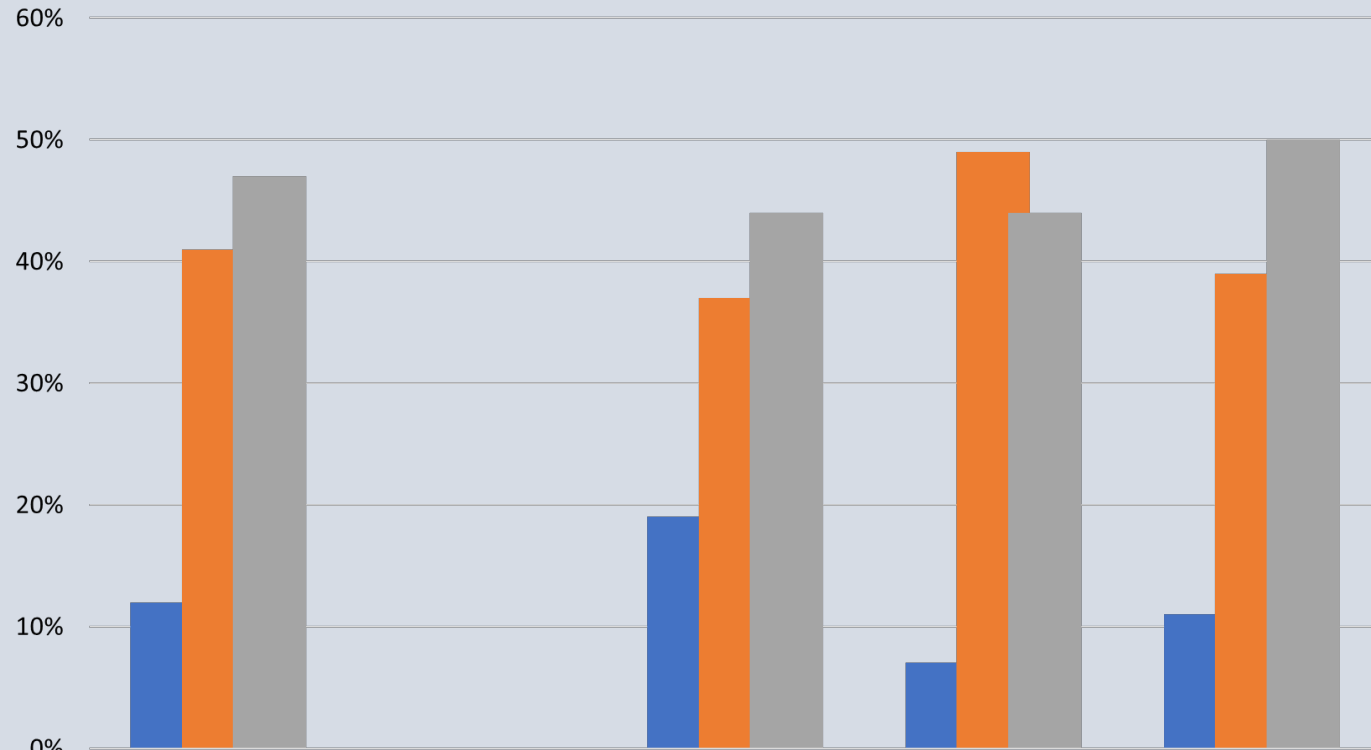


	Total region	Wake	Durham	Orange
GoTriangle	14%	11%	20%	16%
GoRaleigh	13%	20%	6%	3%
GoDurham	13%	4%	35%	9%
Chapel Hill	13%	3%	7%	39%
GoCary	5%	9%	1%	1%
Wolfline	2%	2%	2%	1%

Awareness: Knowing about Bus Stops

[Non-transit users only]

Awareness of Bus Stop or Park & Ride



■ Knows park & ride

■ Knows of stop in walking distance

■ Not sure about stop or P&R

12%

41%

47%

Wake

19%

37%

44%

Durham

7%

49%

44%

Orange

11%

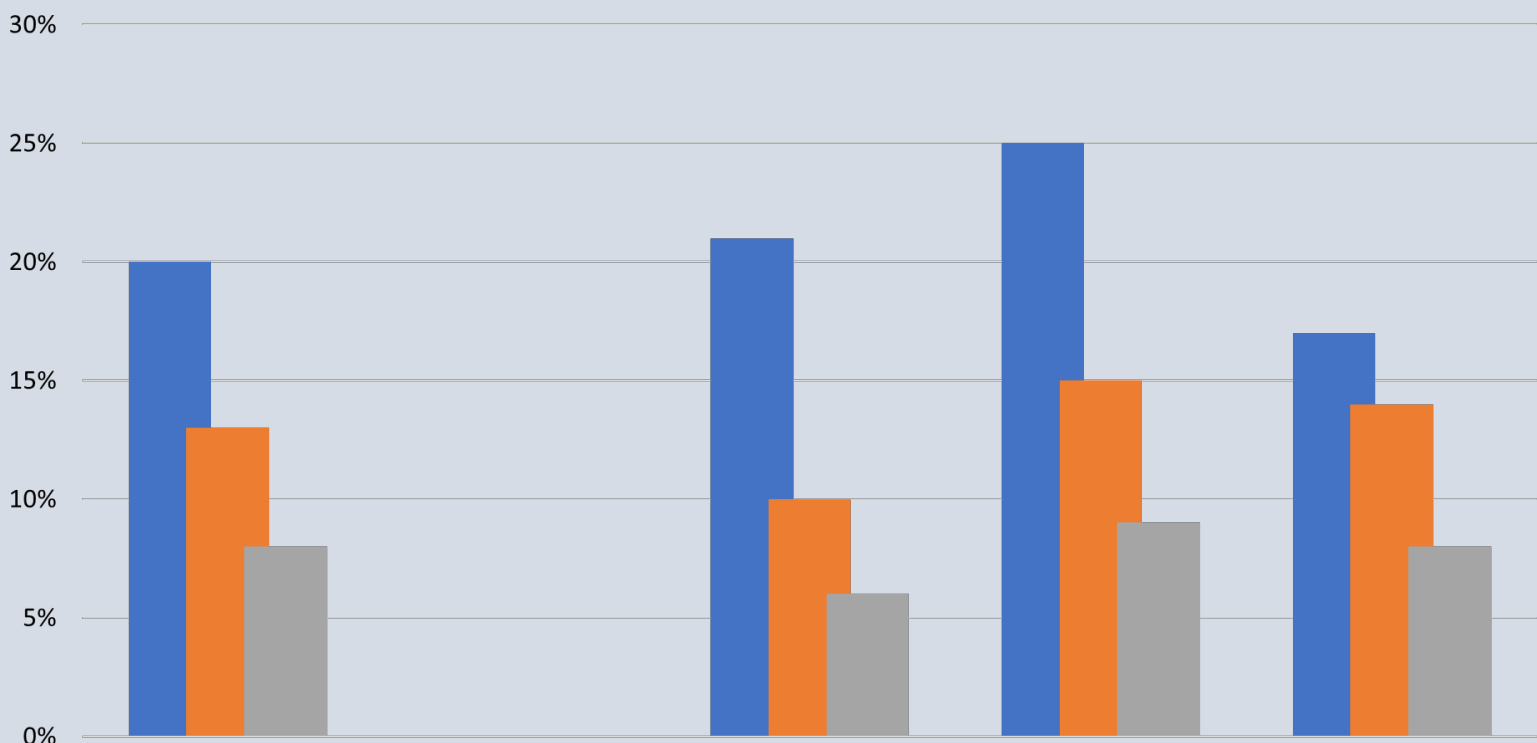
39%

50%

Distance to Bus Stop

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

Distance to Stop

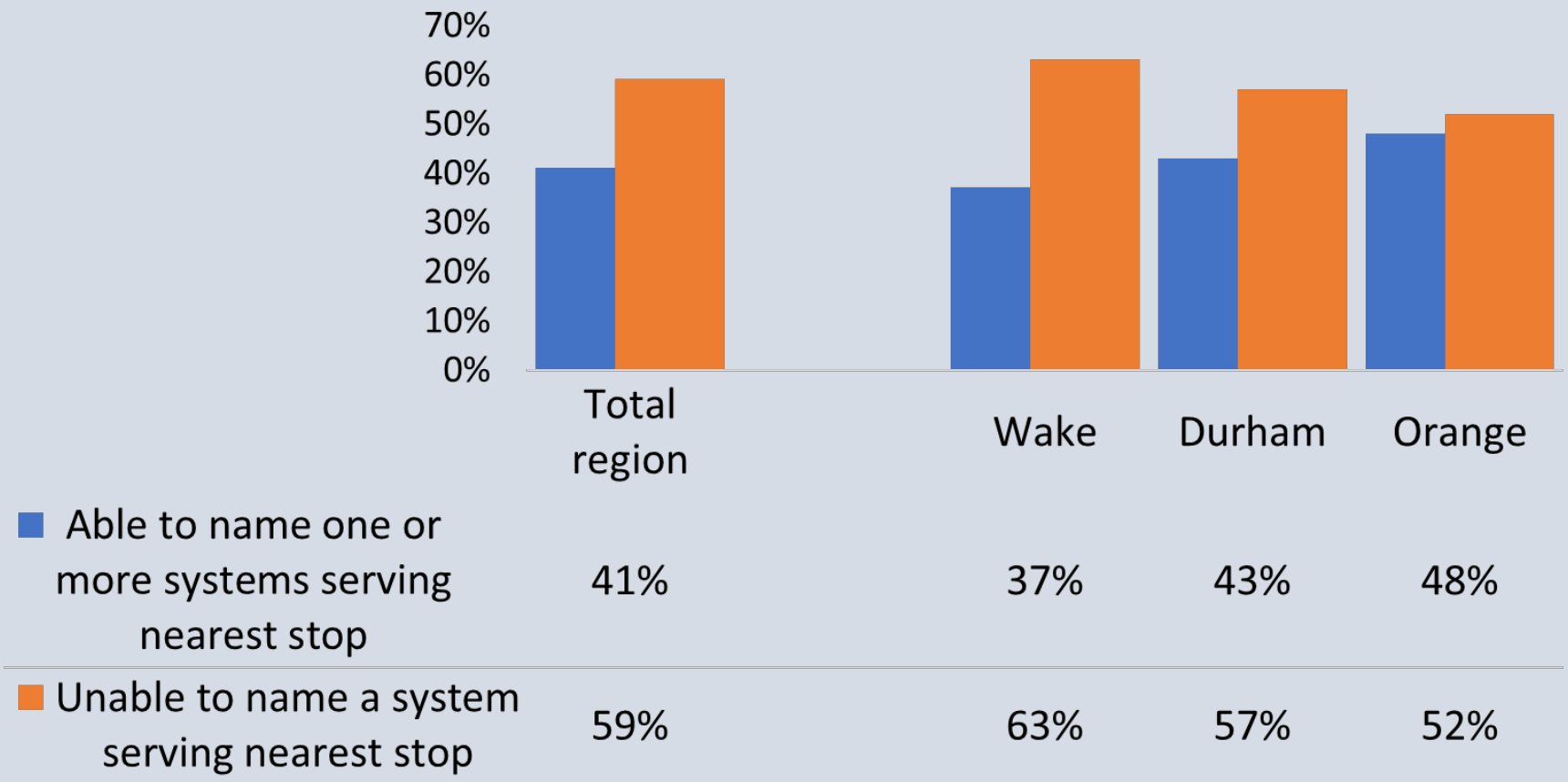


■ Five minutes or less	20%	21%	25%	17%
■ Six to ten minutes	13%	10%	15%	14%
■ Eleven minutes or more	8%	6%	9%	8%

Awareness: Which Bus System(s) Serve the Stop?

[Non-transit users only]

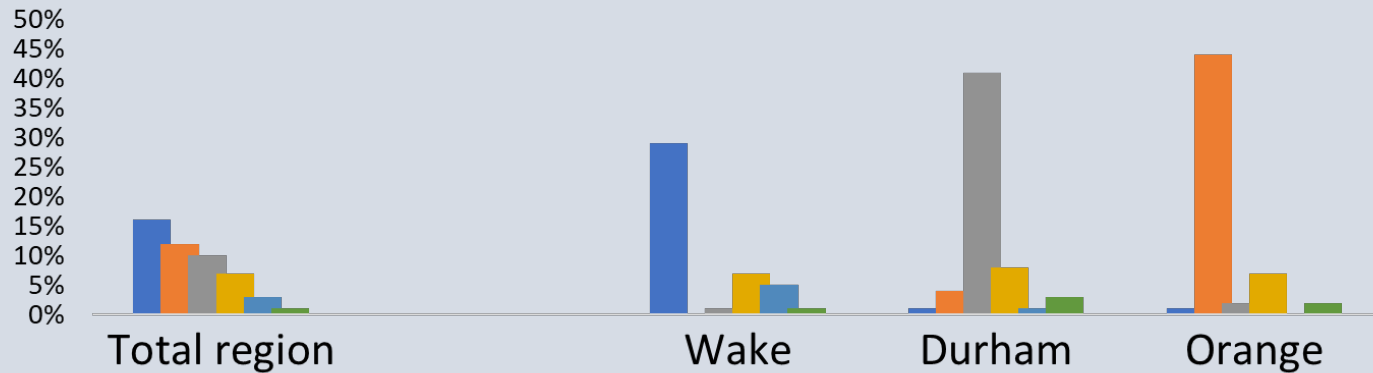
Q9 Able to name one or more bus systems that serve the nearest stop given a list of system names (Non-transit users only)



Awareness of Bus system(s) Serving Nearest Bus Stop

[Non-transit users only; Aided awareness]

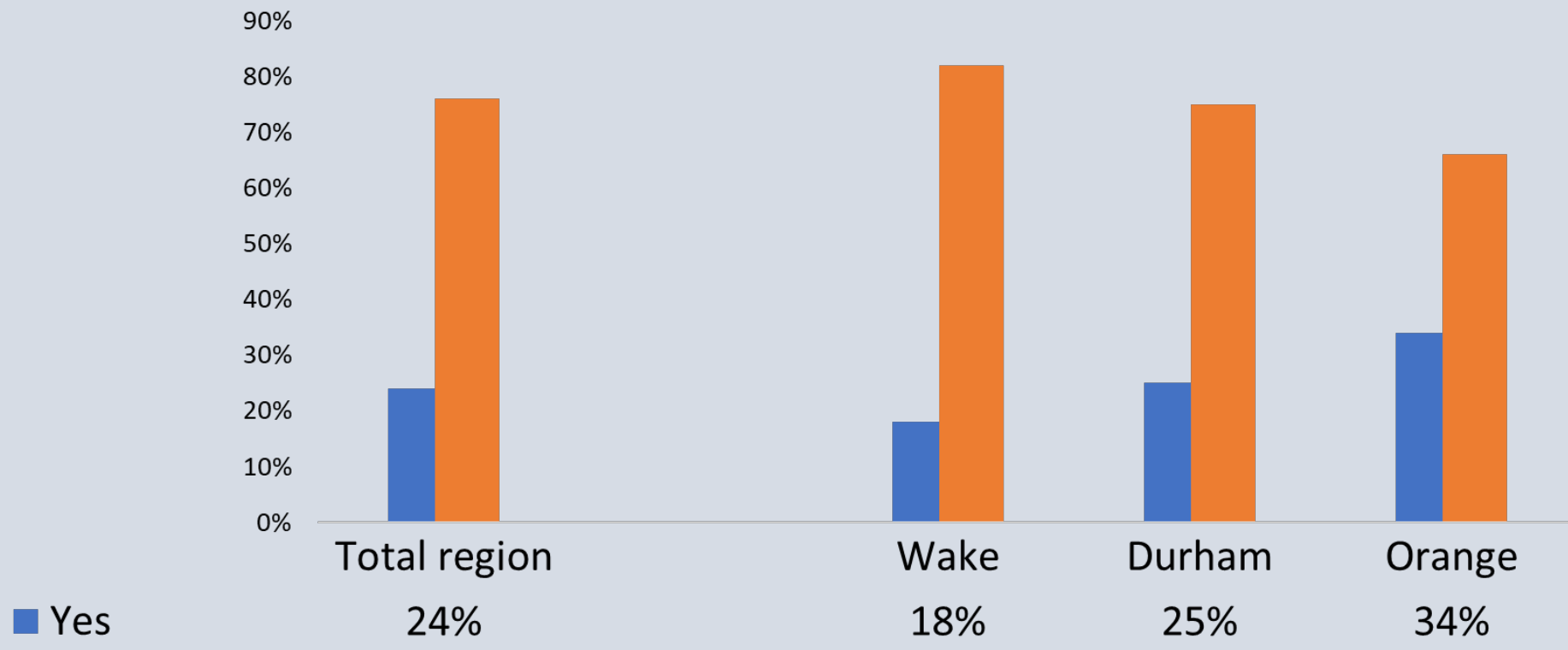
Q9 Which bus system or systems provide service at that bus stop, GoRaleigh, GoDurham, GoTriangle, GoCary or Chapel Hill Transit?
(Non-transit users only)



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

Awareness: Knowing Which Bus to Take for Most Frequent Local Trip [Non-transit users only]

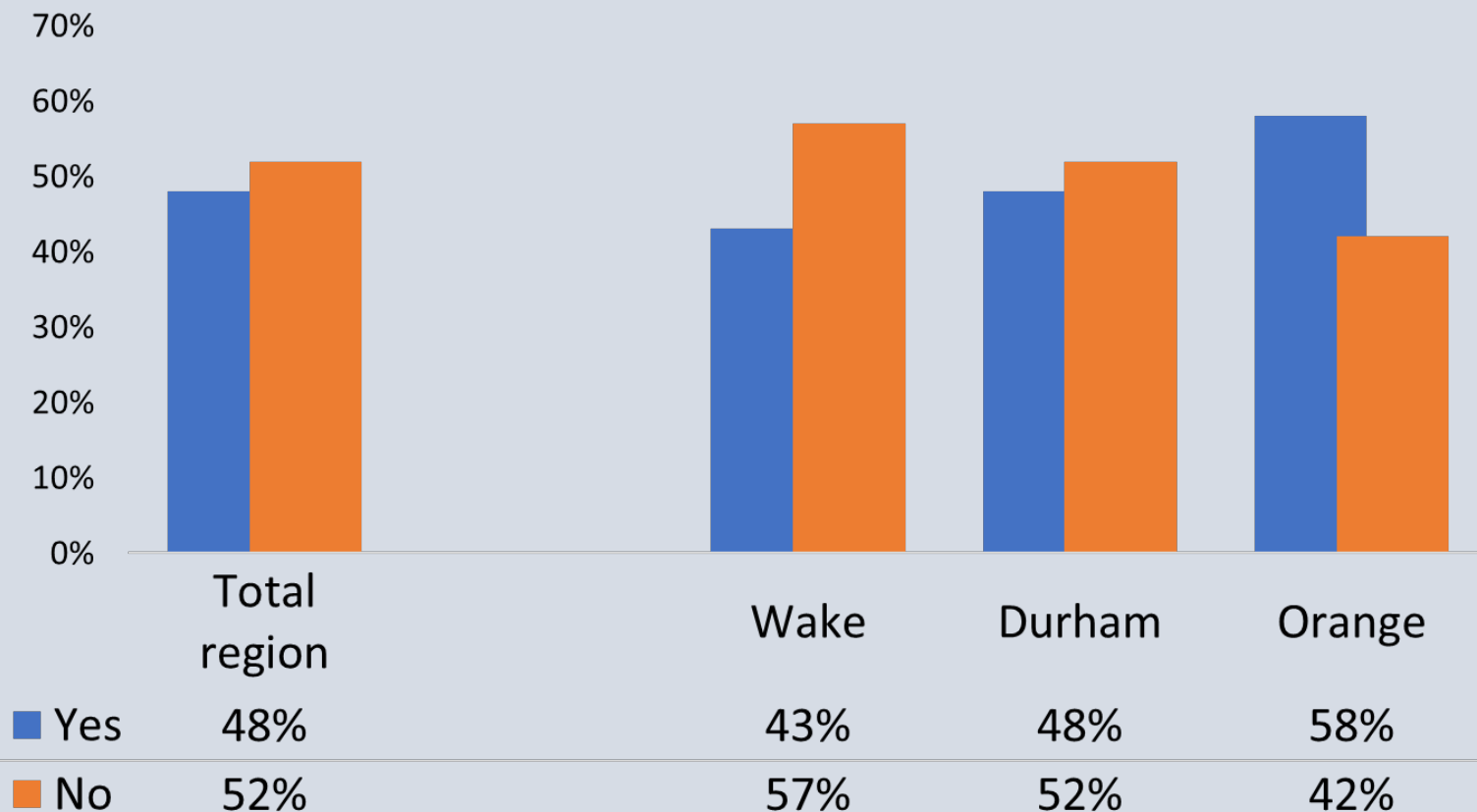
Q10 Also, do you happen to know what bus you would need to take from that stop to get to ...
[work, shopping, school, etc. - purpose named in Q3]



3. Awareness of Transit Improvement Plans

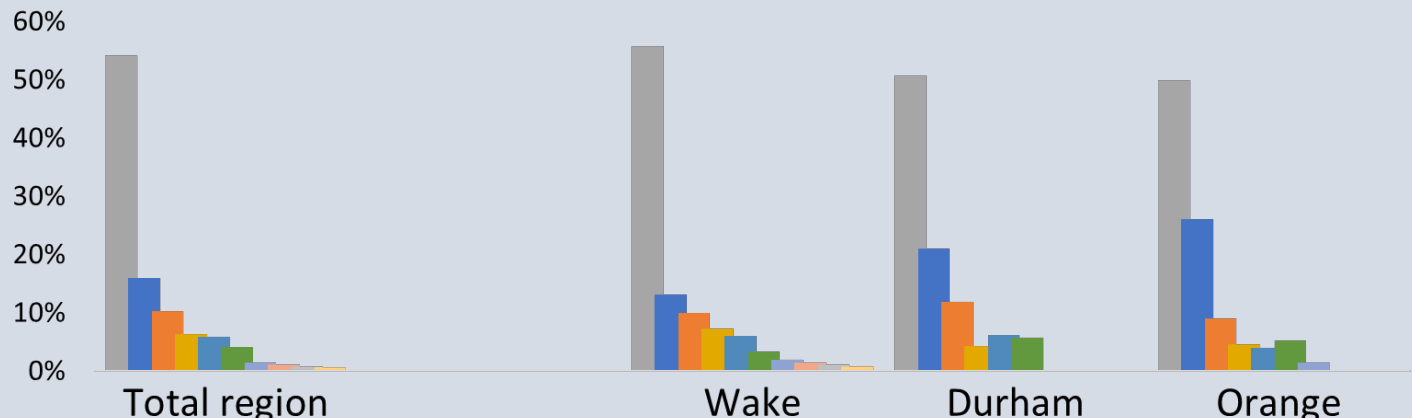
Awareness of Transit Improvement Plans

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



Respondents' Descriptions of What They Know of Plans

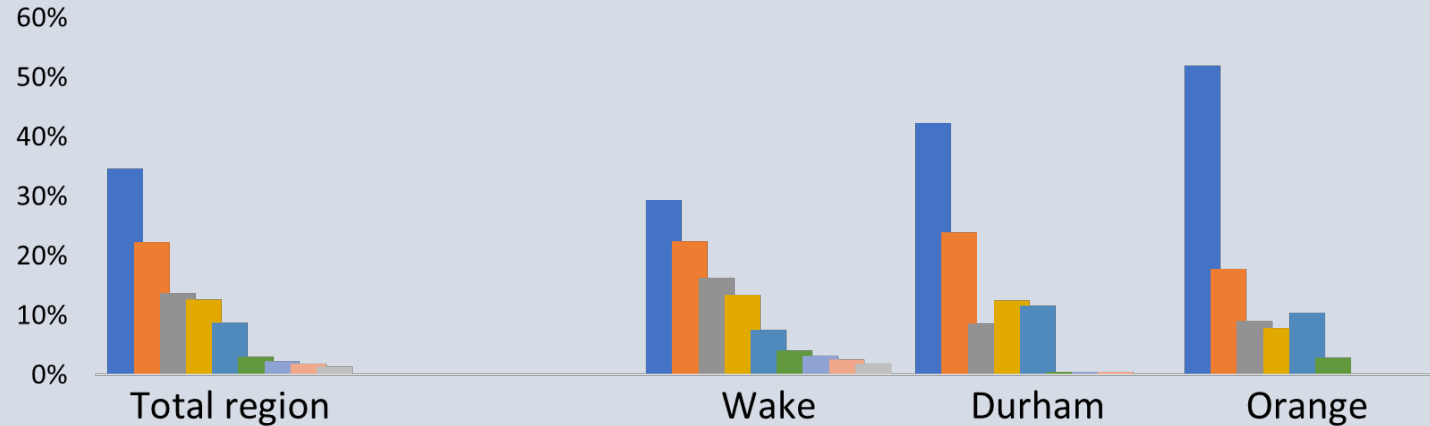
Q15 In a few words, can you tell me what new services being planned you may have heard about?



	Total region	Wake	Durham	Orange
■ Don 't know	54%	56%	51%	50%
■ Light rail	16%	13%	21%	26%
■ Mentions rail	10%	10%	12%	9%
■ Expanded bus service	6%	7%	4%	5%
■ Misc response	6%	6%	6%	4%
■ Light rail cancelled	4%	3%	6%	5%
■ BRT	1%	2%	0%	1%
■ Roadways	1%	1%	0%	0%
■ Service expansion (general)	1%	1%	0%	0%
■ Tax	1%	1%	0%	0%

Respondents' Descriptions of What They Know of Plans

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



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

4. Perceptions of Public Transit and of Benefits of Improvement

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

Attitudes Toward Public Transportation

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



Detail of Pro/Anti Transit Attitudes

	Wake	Durham	Orange	Total region
Q16F You can count on public transportation to get you where you need to go anywhere in the Triangle region				
Agree strongly	5%	5%	3%	4%
Agree	23%	29%	23%	25%
Disagree	30%	33%	41%	34%
Disagree strongly	23%	15%	22%	21%
Not sure	19%	17%	10%	17%

	Wake	Durham	Orange	Total region
Q16G The buses run frequently enough that if you miss one, another one comes along soon				
Agree strongly	3%	3%	6%	4%
Agree	22%	27%	25%	24%
Disagree	22%	27%	28%	24%
Disagree strongly	13%	8%	9%	11%
Not sure	40%	34%	32%	37%

	Wake	Durham	Orange	Total region
Q16H You can get to most or all of your usual destinations in the Triangle region on public transportation				
Agree strongly	3%	7%	3%	4%
Agree	23%	30%	23%	25%
Disagree	31%	28%	35%	31%
Disagree strongly	22%	17%	23%	21%
Not sure	21%	17%	16%	19%

	Wake	Durham	Orange	Total region
Q16I You can count on public transportation to get you to your destination on time				
Agree strongly	2%	3%	4%	3%
Agree	28%	30%	37%	31%
Disagree	27%	30%	26%	28%
Disagree strongly	9%	9%	6%	8%
Not sure	34%	27%	27%	31%

	Wake	Durham	Orange	Total region
Q16J I have a car but would prefer to use the bus				
Agree strongly	4%	7%	9%	6%
Agree	14%	19%	24%	18%
Disagree	54%	46%	48%	50%
Disagree strongly	23%	23%	9%	20%
Not sure	5%	5%	10%	7%

	Wake	Durham	Orange	Total region
Q16A There is enough public transportation now in the Triangle Region so no more is needed				
Agree strongly	3%	4%	5%	4%
Agree	12%	12%	13%	13%
Disagree	36%	39%	36%	37%
Disagree strongly	31%	26%	34%	31%
Not sure	17%	18%	11%	16%

	Wake	Durham	Orange	Total region
Q16B It just takes too long to get places using public transportation				
Agree strongly	20%	23%	16%	20%
Agree	40%	40%	41%	40%
Disagree	19%	19%	22%	20%
Disagree strongly	3%	4%	5%	4%
Not sure	18%	14%	16%	17%

	Wake	Durham	Orange	Total region
Q16C I would probably feel uncomfortable riding on the bus with most people who use the bus in the Triangle region				
Agree strongly	3%	6%	3%	4%
Agree	13%	11%	9%	12%
Disagree	47%	47%	44%	46%
Disagree strongly	28%	28%	41%	31%
Not sure	9%	8%	3%	7%

	Wake	Durham	Orange	Total region
Q16D I would not feel safe using the local public buses				
Agree strongly	4%	7%	4%	5%
Agree	11%	12%	7%	10%
Disagree	53%	50%	43%	50%
Disagree strongly	26%	22%	39%	28%
Not sure	7%	9%	6%	7%

	Wake	Durham	Orange	Total region
Q16E I just won't use the bus because I have a car				
Agree strongly	26%	22%	11%	22%
Agree	41%	34%	35%	38%
Disagree	25%	31%	31%	28%
Disagree strongly	6%	11%	16%	10%
Not sure	2%	2%	7%	3%



Information about Major Transit Improvements

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

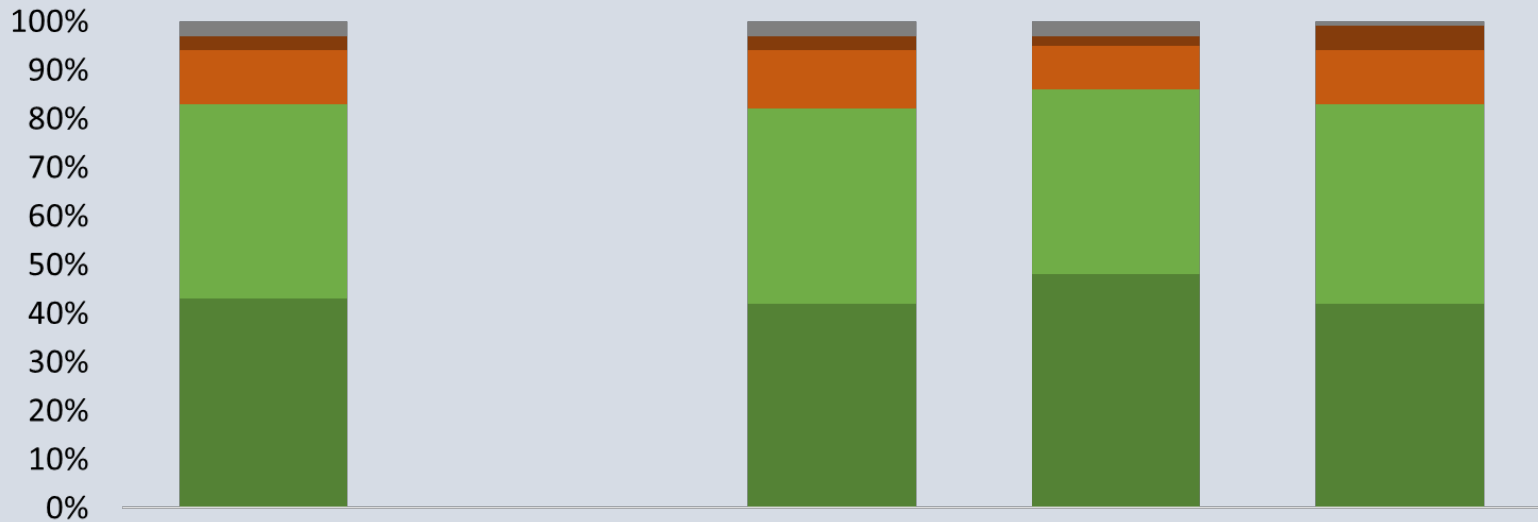
(1) One change is bus service running more often, to more places, for more hours a day and more days a week.

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

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

Transit Improvements and Community Benefit

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



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

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

Service Improvement Priorities

Wake Durham Orange Region

Q18A For the Triangle region, how important is it to have bus service running more often, to more places, for more hours a day and more days a week?

Very important	55%	59%	53%	55%
Somewhat important	27%	23%	29%	27%
Not very important	8%	8%	8%	8%
Not important at all	6%	5%	8%	6%
Not sure	4%	5%	2%	4%

Q18B For the Triangle region, how important is it to have a new service called "Bus Rapid Transit" running fast in their own lane separate from traffic, a service being planned for Raleigh & Chapel Hill?

Very important	45%	50%	39%	45%
Somewhat important	25%	21%	31%	26%
Not very important	14%	11%	12%	13%
Not important at all	11%	10%	14%	11%
Not sure	5%	8%	4%	5%

Q18C For the Triangle region, how important is it to provide peak hour commuter trains running next to I-40 between Garner and Durham through Cary, Raleigh, and Research Triangle Park?

Very important	57%	62%	50%	56%
Somewhat important	23%	21%	22%	22%
Not very important	9%	6%	10%	8%
Not important at all	7%	6%	12%	8%
Not sure	4%	5%	6%	6%

Perceived Importance of Specific Transit Improvements

Service Improvement Priorities

Wake Durham Orange Region

Q19A How likely is it that you personally would use very frequent bus service with good connections to almost all Triangle region destinations, for many hours a day seven days a week?

Very likely	19%	27%	23%	22%
Somewhat likely	33%	31%	33%	33%
Not likely	45%	38%	39%	42%
(VOL) Depends on the routes	0%	1%	2%	1%
Not sure	3%	3%	3%	3%

Q19B How likely is it that you personally would use Bus Rapid Transit running most of the route between downtown Raleigh and suburbs separated from traffic in separate lanes?

Very likely	16%	17%	13%	15%
Somewhat likely	30%	25%	21%	27%
Not likely	50%	49%	61%	52%
(VOL) Depends on the routes	1%	2%	1%	1%
Not sure	4%	8%	4%	5%

Q19C How likely is it that you personally would use peak hour commuter trains running next to I-40 between Garner and Durham through Cary, Raleigh, and Research Triangle Park?

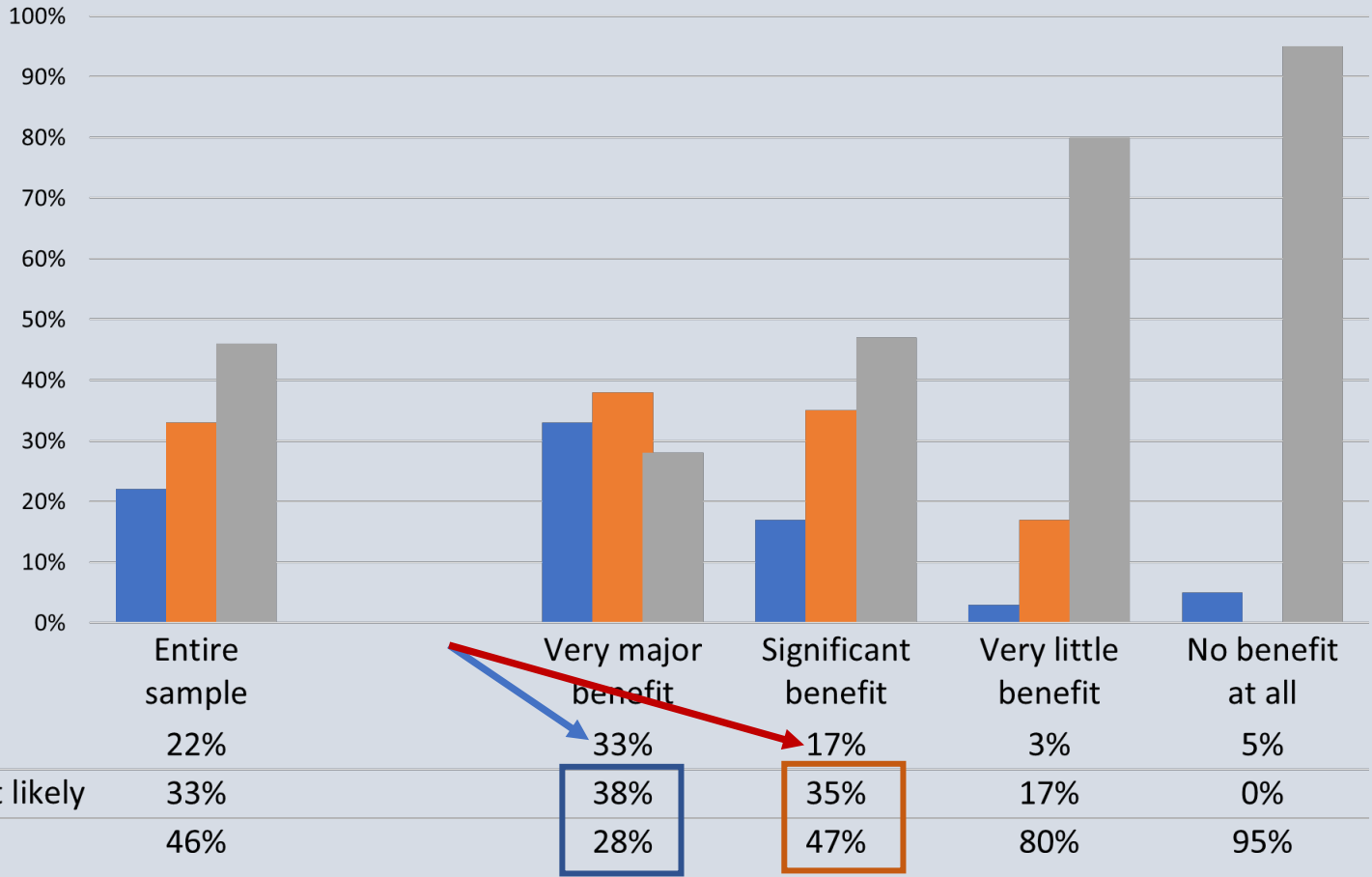
Very likely	21%	26%	16%	21%
Somewhat likely	26%	24%	20%	26%
Not likely	49%	43%	59%	49%
(VOL) Depends on the routes	1%	2%	3%	1%
Not sure	3%	5%	2%	3%

Perceived Personal Use of Specific Transit Improvements

Community Interest / Self-Interest

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

Q19A How likely is it that you personally would use very frequent bus service with good connections to almost all Triangle region destinations, for many hours a day, seven days a week?

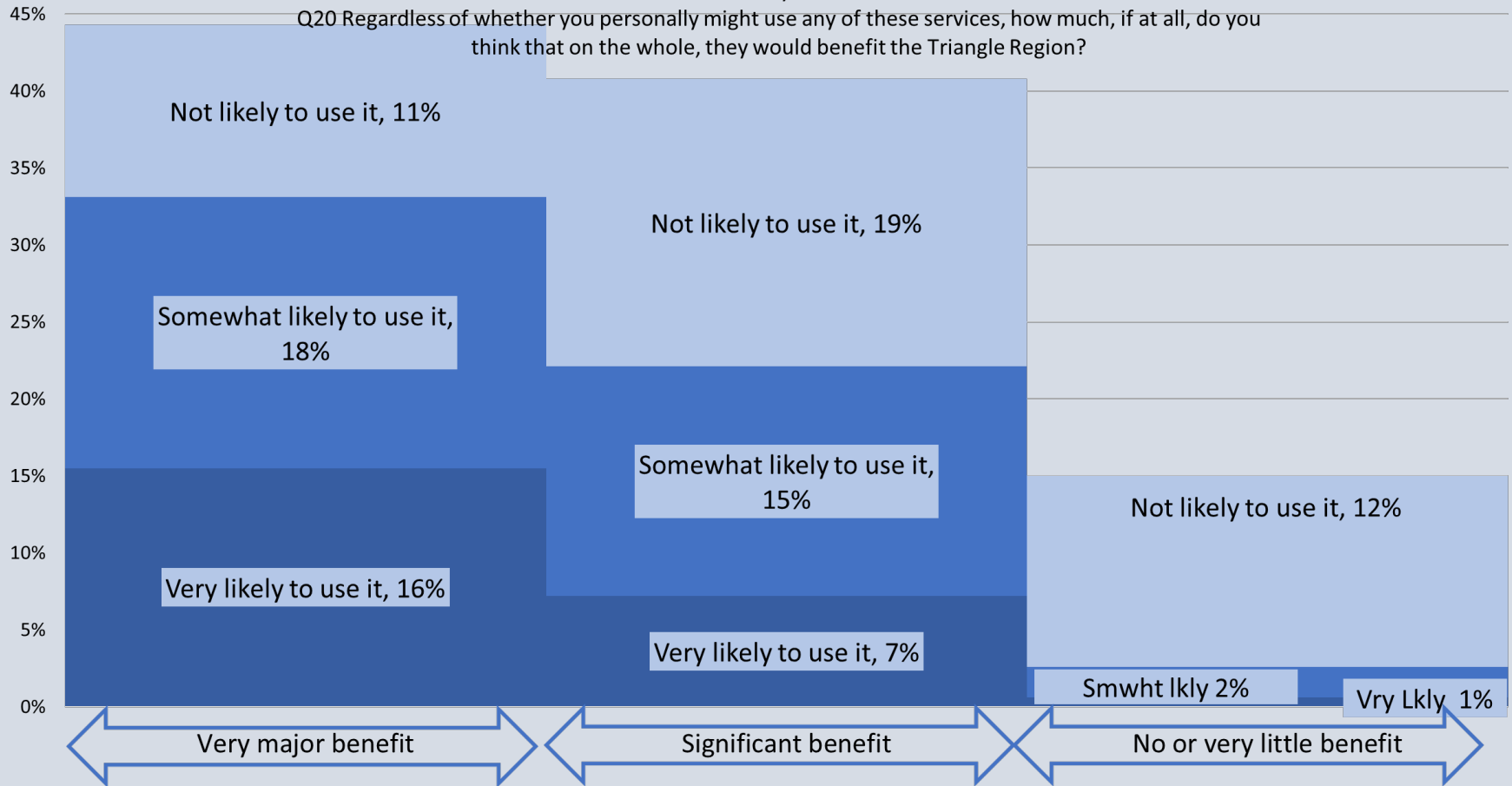


Community Interest / Self-Interest

Percentages based on total adult population

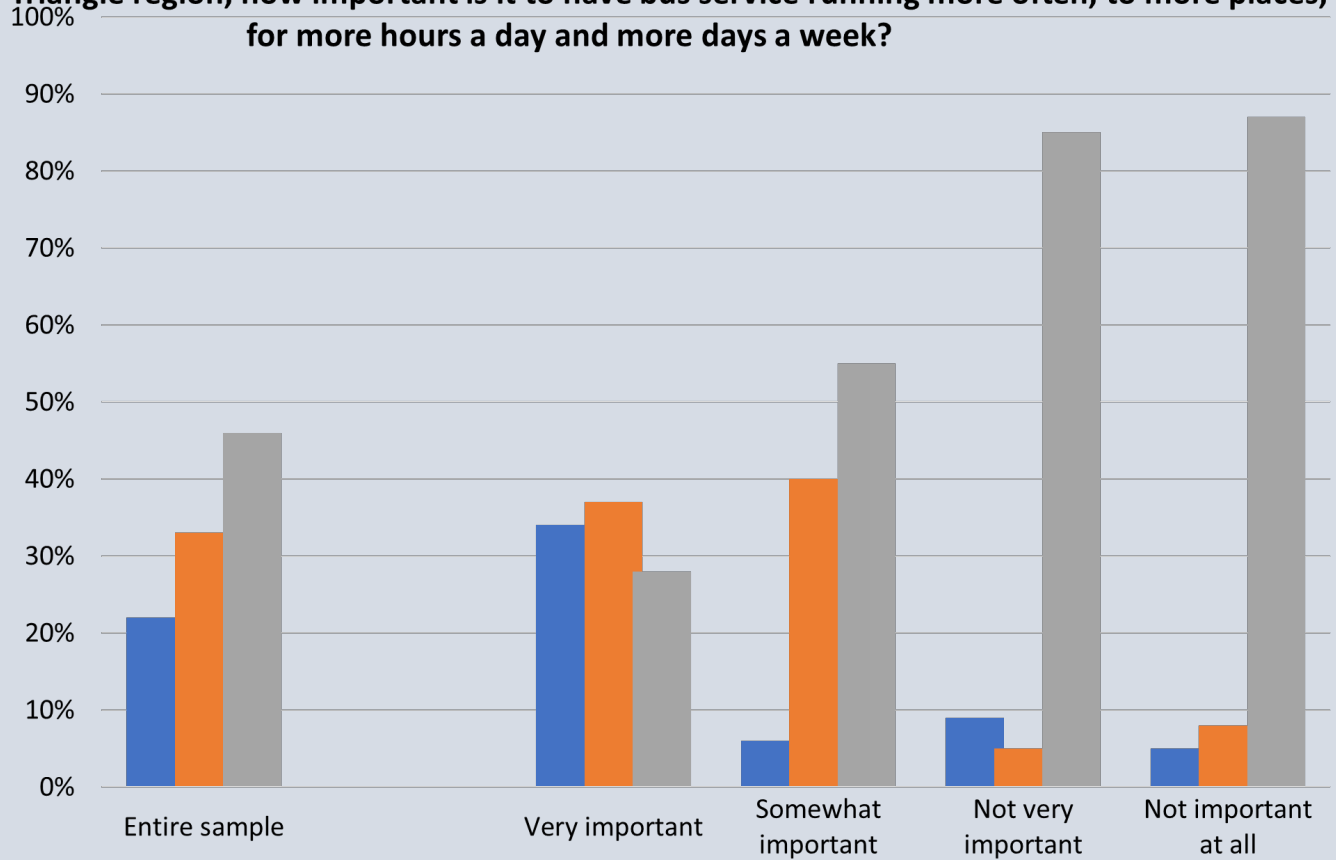
Q19A How likely is it that you personally would use very frequent bus service with good connections to almost all Triangle region destinations, for many hours a day seven days a week?

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



Self and Community Interest in Specific Services: Expanded Bus Service

Q18A For the Triangle region, how important is it to have bus service running more often, to more places, for more hours a day and more days a week?

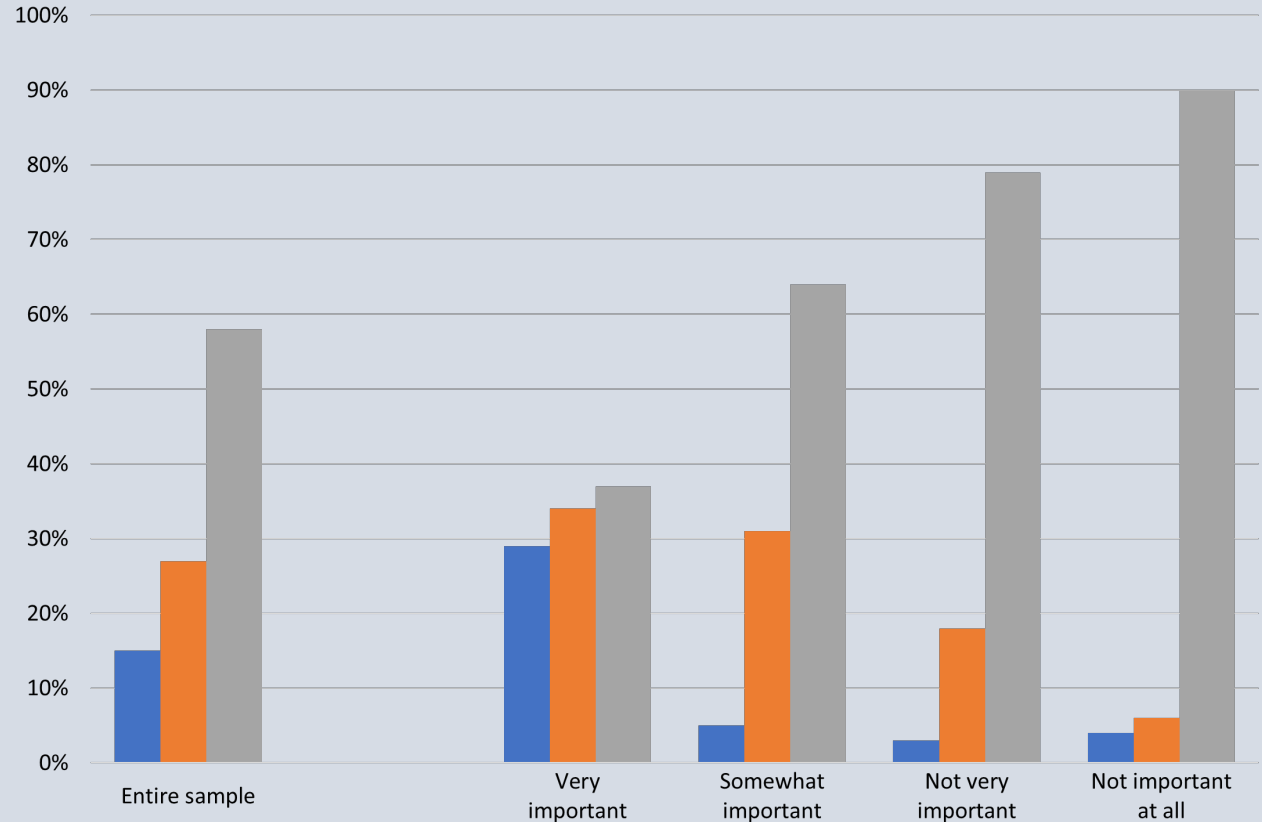


Q19A How likely is it that you personally would use very frequent bus service with good connections to almost all Triangle region destinations, for many hours a day seven days a week?

Response	Entire sample	Very important	Somewhat important	Not very important	Not important at all
Very likely to use it	22%	34%	6%	9%	5%
Somewhat likely to use it	33%	37%	40%	5%	8%
Not likely to use it	46%	28%	55%	85%	87%

Self and Community Interest in Specific Services: BRT

Q18B For the Triangle region, how important is it to have a new service called "Bus Rapid Transit" running fast in their own lane separate from traffic, a service being planned for Raleigh & Chapel Hill?



Q19B How likely is it that you personally would use Bus Rapid Transit running most of the route between downtown Raleigh and suburbs separated from traffic in separate lanes?

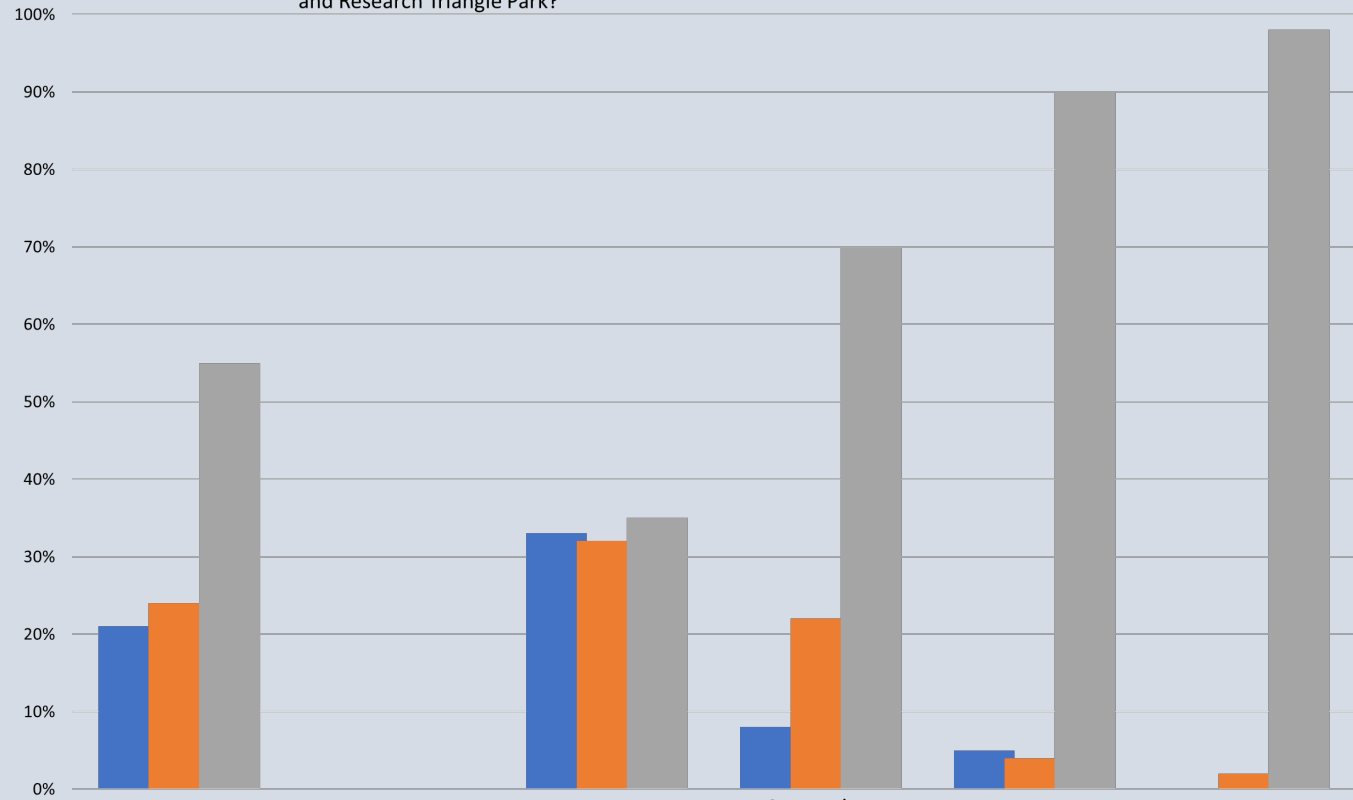
Very likely to use it

Somewhat likely to use it

Not likely to use it

Self and Community Interest in Specific Services: Commuter Rail Service

Q18C For the Triangle region, how important is it to provide peak hour commuter trains running next to I-40 between Garner and Durham through Cary, Raleigh, and Research Triangle Park?



Q19C How likely is it that you personally would use peak hour commuter trains running next to I-40 between Garner and Durham through Cary, Raleigh, and Research Triangle Park?

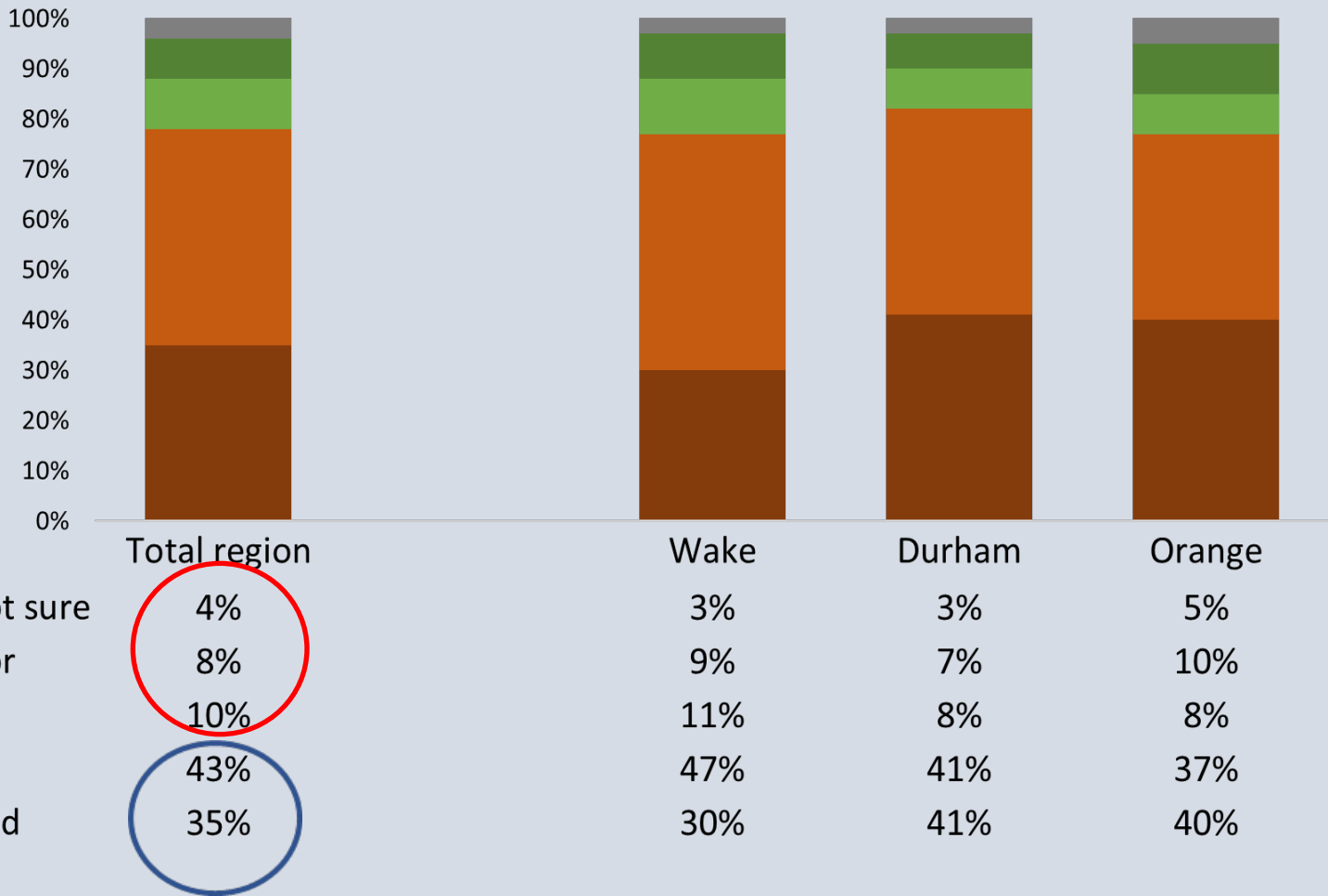
- Very likely to use it
- Somewhat likely to use it
- Not likely to use it

	Entire sample	Very important	Somewhat important	Not very important	Not important at all
Very likely to use it	21%	33%	8%	5%	0%
Somewhat likely to use it	24%	32%	22%	4%	2%
Not likely to use it	55%	35%	70%	90%	98%

5. Attitudes Toward Tax Funding of Public Transportation Improvements

Use of Tax Dollars to Fund Transit Improvements

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

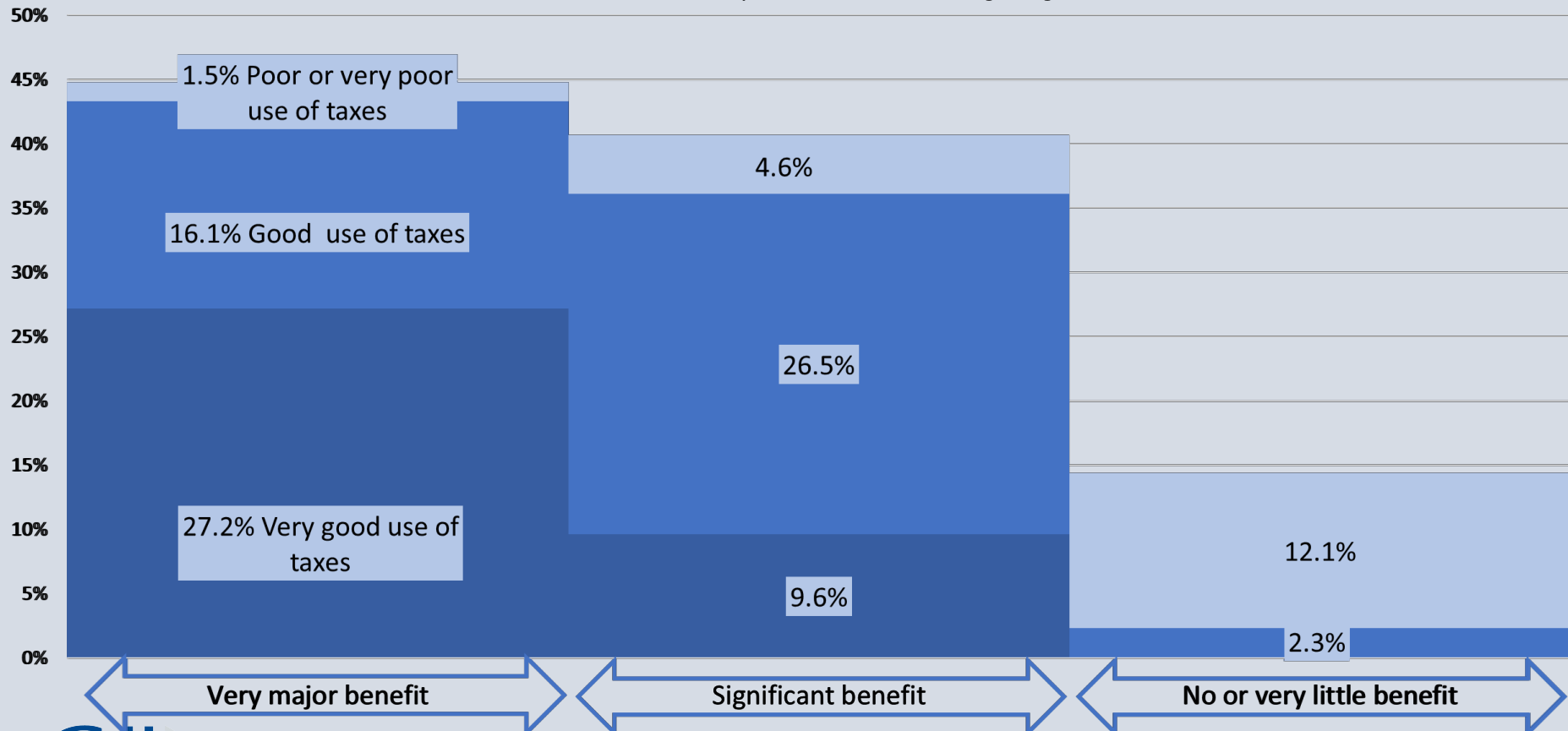


The Dividing Line between Positive and Less Positive View of Taxes for Transit Improvement is between “Very major” and only “Significant” Benefit, not between Some Benefit and No Benefit

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

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



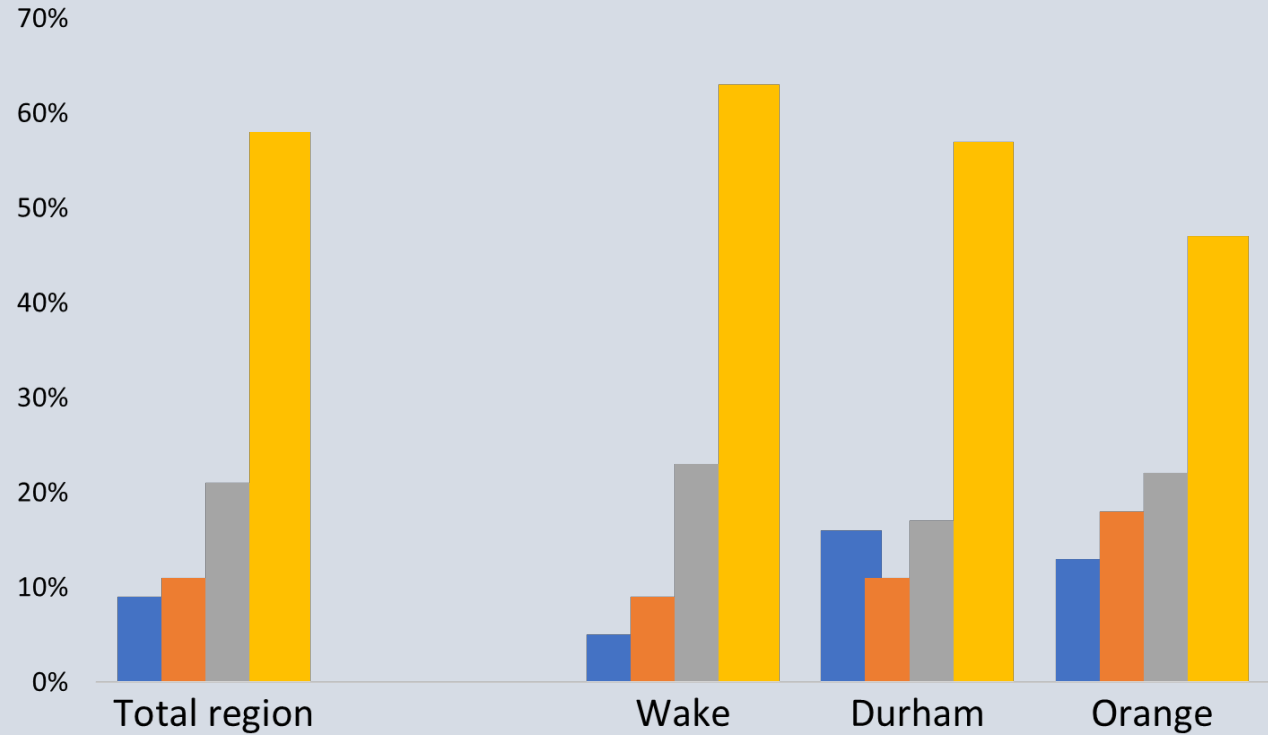
6. Public Transportation Market Profile

Reminder of the Market Index

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

Market Overview

Use of and interest in using public transportation



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

Market Demographics

Demographic profile of transit use and potential use

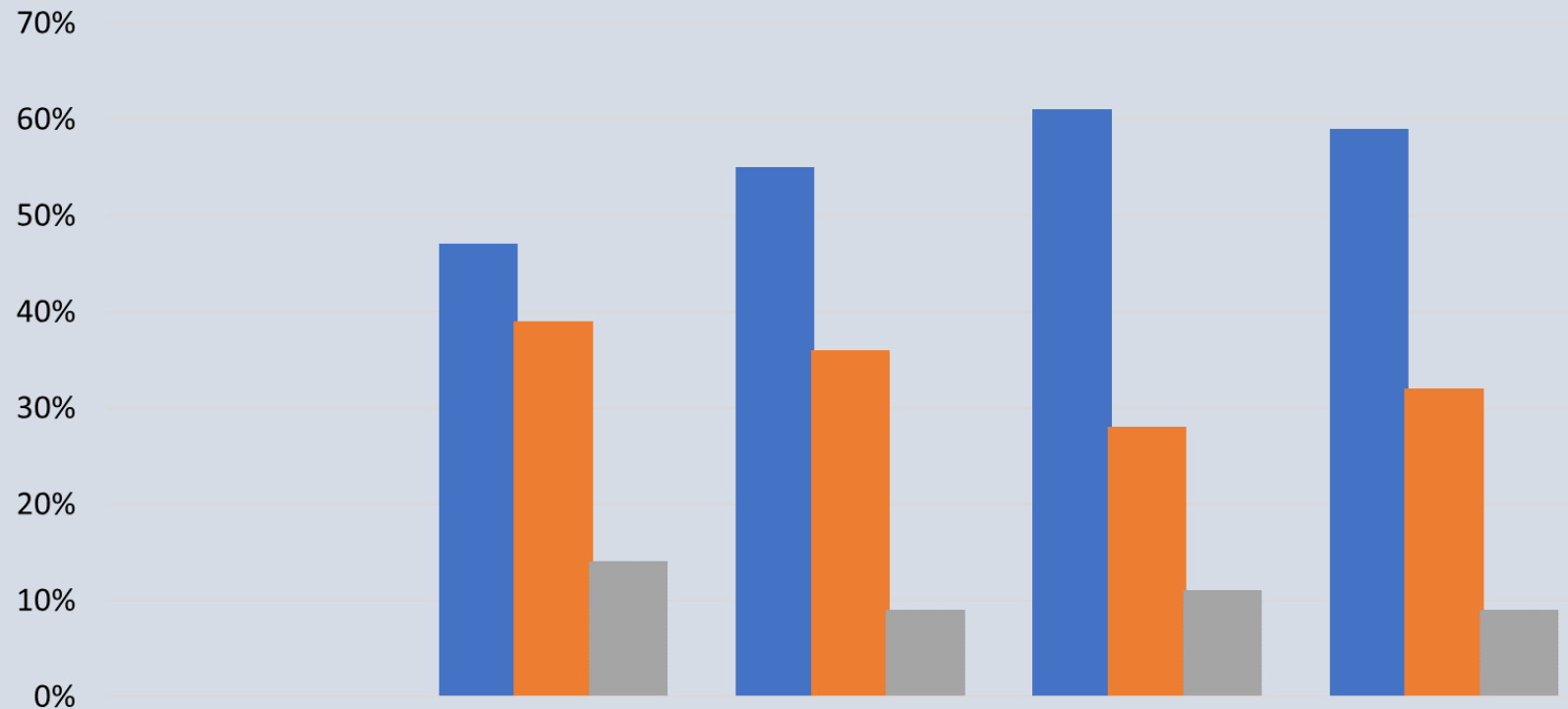
	Total region	Regular rider	Occasional rider	Some potential to use transit	Rejects using transit
Q26 Ethnic self-identification					
White/Caucasian	58%	47%	55%	61%	59%
African American	19%	23%	23%	17%	18%
Hispanic	7%	12%	8%	4%	7%
Asian	4%	4%	0%	6%	4%
Multi-ethnic	2%	0%	5%	1%	3%
Other	10%	14%	9%	11%	9%
Q31 Do you identify yourself as male, female, or do you prefer not to answer?					
Male	44%	44%	41%	48%	43%
Female	50%	46%	49%	47%	52%
Prefer not to answer	6%	10%	10%	5%	4%
Q32 Do you rent or own the home where you now live?					
Rent	24%	39%	24%	25%	21%
Own	75%	59%	75%	75%	78%
Not sure	1%	2%	1%	0%	1%
Q33 Age group					
18-39	41%	49%	40%	34%	42%
40-59	43%	41%	47%	48%	40%
60+	16%	10%	12%	18%	18%
Q34 Income					
Less than \$20,000	6%	19%	9%	5%	4%
\$20,000 to \$34,999	8%	8%	11%	8%	8%
\$35,000 to \$49,999	11%	16%	14%	9%	11%
\$50,000 to \$74,999	16%	12%	15%	18%	16%
\$75,000 to \$100,000	19%	12%	14%	19%	21%
\$101,000 to \$124,999	12%	7%	9%	12%	14%
\$125,000 or more	27%	25%	29%	30%	26%

Ethnicity and the Transit Market

	Total region	Regular rider	Occasional rider	Some potential to use transit	Rejects using transit
Q26 Ethnic self-identification					
White/Caucasian	58%	47%	55%	61%	59%
African American	19%	23%	23%	17%	18%
Hispanic	7%	12%	8%	4%	7%
Asian	4%	4%	0%	6%	4%
Multi-ethnic	2%	0%	5%	1%	3%
Other	10%	14%	9%	11%	9%

Ethnicity

Ethnic contrasts among market segments

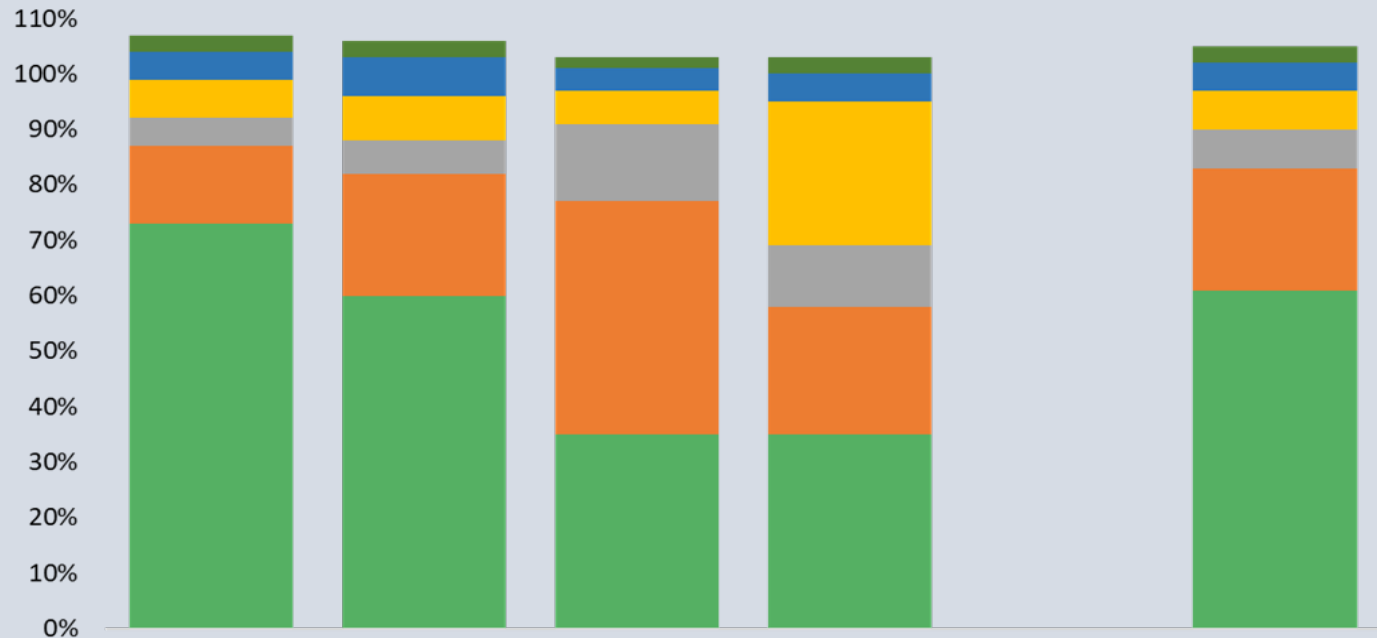


■ White/Caucasian
■ Minority
■ Other

Regular rider	47%	55%	61%	59%
Occasional rider	39%	36%	28%	32%
Some potential to use transit	14%	9%	11%	9%

A Reminder of How Different the Ridership is from the Public

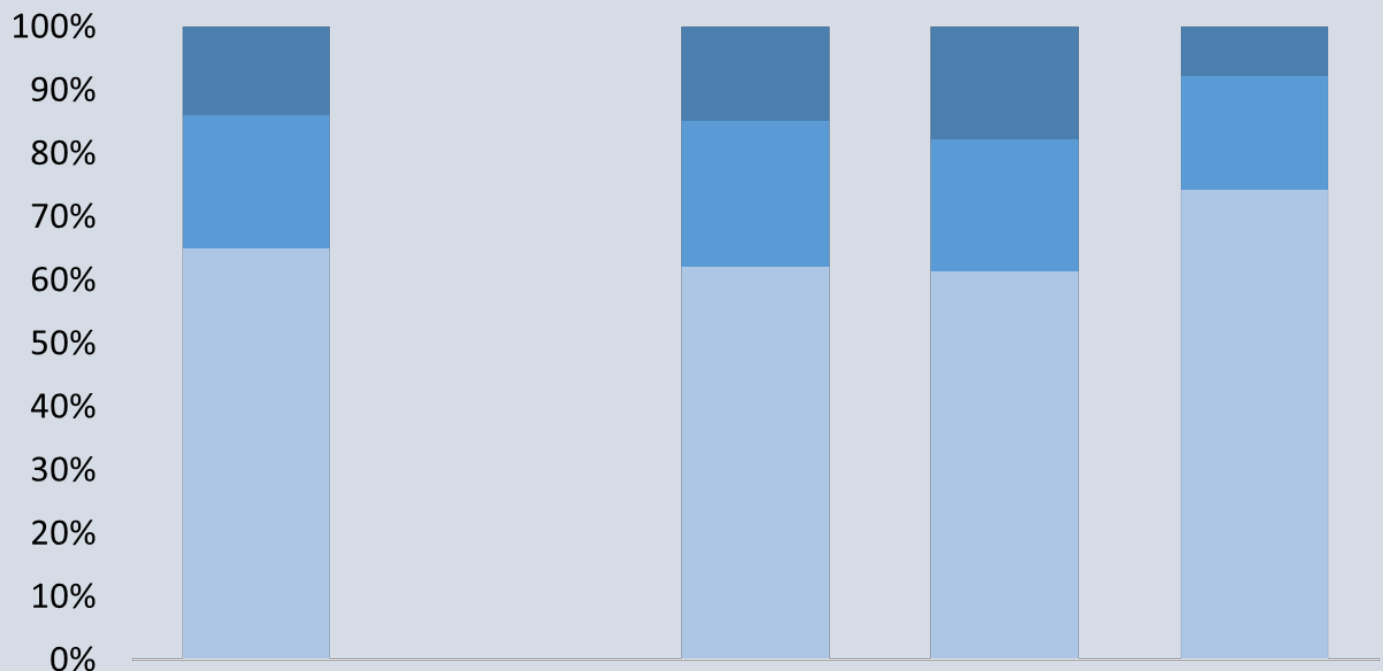
Ethnic Background of Respondents



	GoDurham	GoRaleigh	GoTriangle	GoCary	2018
Native American Indian	3%	3%	2%	3%	3%
Other	5%	7%	4%	5%	5%
Hispanic	7%	8%	6%	26%	7%
Asian	5%	6%	14%	11%	7%
Caucasian/White	14%	22%	42%	23%	22%
African American/Black	73%	60%	35%	35%	61%

Ridesharing

Use of Uber or Lyft in Triangle Region in past thirty days

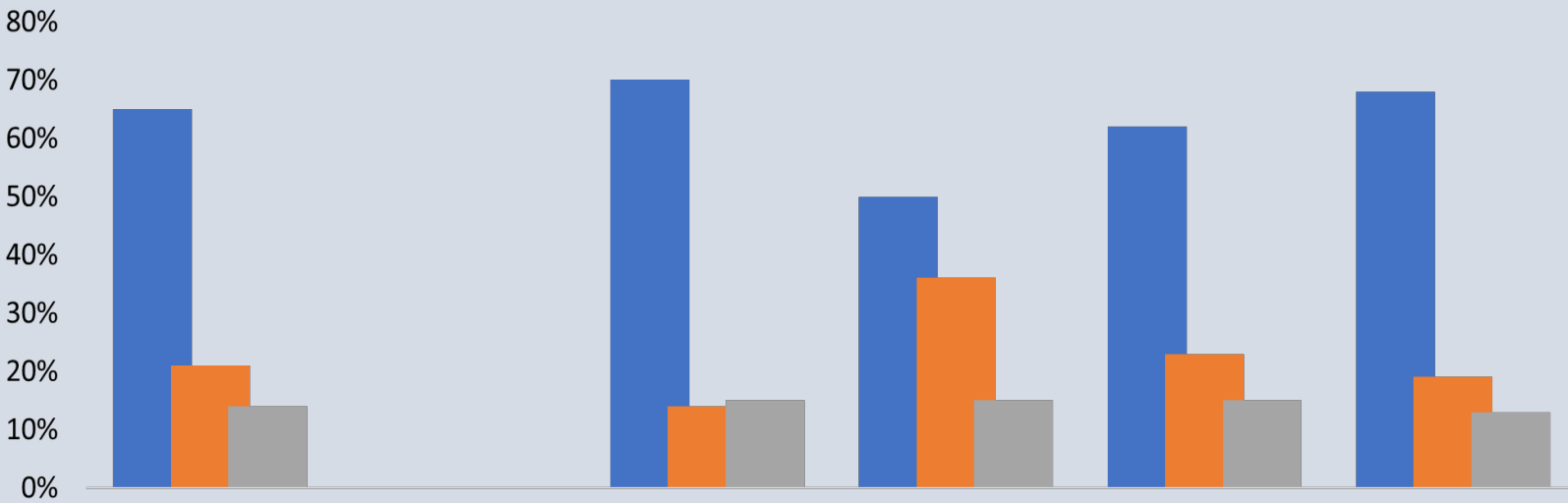


- Four or more times
- One to three times
- Not at all

	Total region	Wake	Durham	Orange
Four or more times	14%	15%	18%	8%
One to three times	21%	23%	21%	18%
Not at all	65%	62%	62%	75%

Use of Ridesharing by the Market Segments

Use of ridesharing by the transit market segments



	All respondents	Regular rider	Occasional Rider	Some potential to use transit	Rejects using transit
■ Not at all	65%	70%	50%	62%	68%
■ One to three times	21%	14%	36%	23%	19%
■ Four or more times	14%	15%	15%	15%	13%

Community Survey, 2019 Triangle Region