



Transportation in the Washington, DC Area

Spring 2016 Washington MarkeTrak[®]

Prepared by:

 **wba** RESEARCH

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Public Transportation *pages 5-10*

- Three-fourths (75%) of all Washington, DC area residents have either used public transportation in the past month (47%) or are likely to consider doing so in the future (28%). *pages 5-7*
- Satisfaction with the region's transportation system shows room for improvement. Only 29% of area residents are satisfied (rated 8-10 on a 0-10 scale), while 52% gave more neutral ratings of 4-7. *page 8*
- Support for increased government funding of public transportation is high—78% of Washington, DC area residents say they would be very or somewhat likely to support an increase. Support is most pronounced among District of Columbia residents (58% *very likely* to support vs. 28%-38% of suburban residents). And, while it might not be surprising that transit users are more likely than non-users to be *very likely* to support increased public transportation funding (50% vs. 24%), even the majority of non-users (72%) would at least be somewhat likely to support an increase. *page 9*
- Maintaining existing roads and bridges (82% rated 8-10), as well as reducing traffic congestion by improving public transportation (73% rated 8-10), are rated as the most important types of projects in which the region could invest. *page 10*

App-Based Transportation *pages 12-19*

- Among residents of the Washington, DC region, familiarity with app-based transportation companies (otherwise known as transportation network companies, or TNCs) Uber and Lyft is driven primarily by the 18-34 year old age segment (88% familiar with Uber, 69% familiar with Lyft). *page 12*
- About one in five area residents have used an app-based transportation company to get to or from Metrobus, Metrorail or other public transit (18%) or to Reagan National, Dulles or BWI Marshall Airports (20%). *page 14*
- District of Columbia residents are significantly more likely than their suburban counterparts to have taken any trips using an app-based transportation company in the past month (57% vs. 23%-24%). They also average more trips per month than suburban riders (7.7 DC vs. 4.0-4.5 MD/VA/WV). *page 15*
- Taxi is most often the back up when app-based transportation is not available (44%). One-fifth, however, drive themselves (22%) or turn to public transportation (21%). *Page 18*
- More than one-half (53%) of those who have used Uber or Lyft say they have encountered Surge/Prime Time pricing and chose to accept the higher fare and take the trip anyway, while 12% opted out of the higher fare. *page 19*

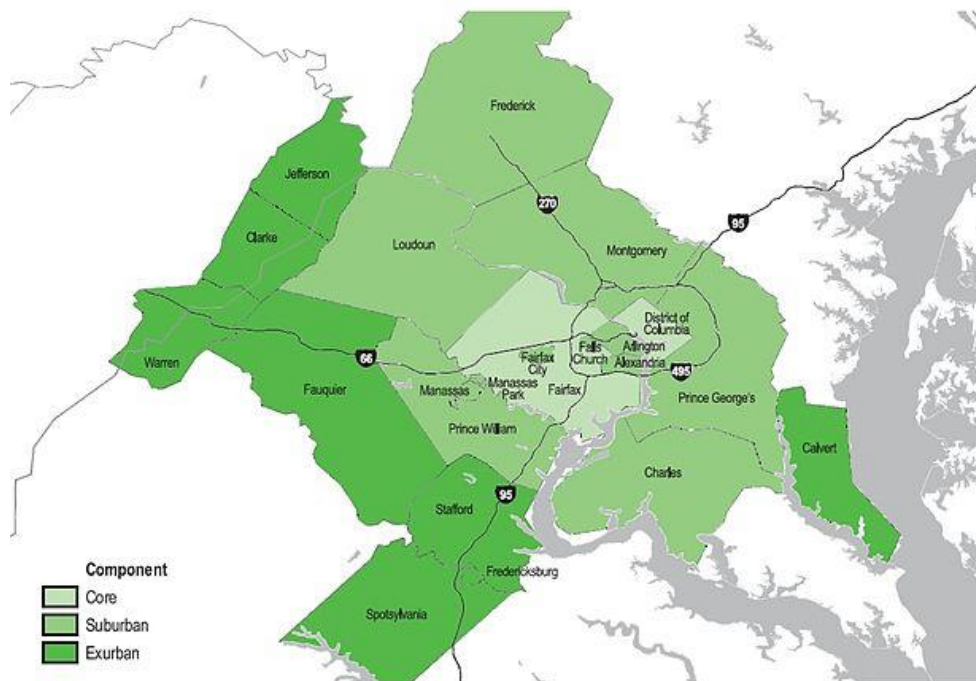
Airports *pages 21-28*

- Seven in ten area residents (70%) have taken a trip from Reagan National (48%), Dulles (42%) or BWI Marshall (31%) in the past 12 months. Airport preference varies widely by specific area of residence and is driven primarily by location. *pages 21-24*
- Air travelers residing in the District of Columbia are most likely to consider Reagan National for a future flight (84% very likely); however, more than four in ten are very likely to consider Dulles (46%) and/or BWI Marshall (42%). Suburban Maryland air travelers are most likely to consider BWI Marshall (63% very likely). Northern Virginia/West Virginia suburban residents are equally likely to consider Dulles (54% very likely) and/or Reagan National (53% very likely) in the future. *pages 25-27*
- Across the region, 50% of area residents say that the opening of the first phase of the Silver Line of Metro impacted their airport preference. The greatest impact was among residents of the District of Columbia itself (65% impacted). *page 28*

MarkeTrak[®] is a quarterly omnibus public opinion survey conducted by WBA Research.

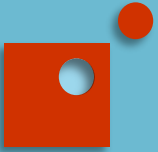
The survey combines general interest questions with those of specific WBA clients who share the cost of the study to obtain answers to critical questions quickly and inexpensively.

This Washington MarkeTrak[®] study was conducted in the Washington, DC metropolitan area through a random telephone survey of 200 adult heads of household and 201 online respondents.



Map by Bureau of Labor Statistics - Monthly Labor Review December 2006, Public Domain

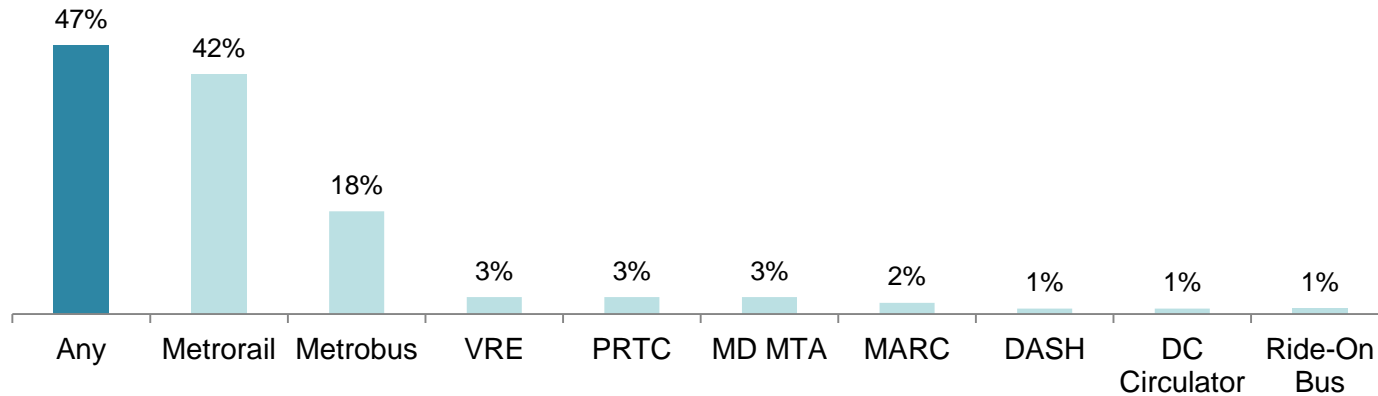
WBA Research is a full-service market research firm located in Crofton, MD. The company was founded in 1987 with a focus on providing high quality custom research and responsive client service. WBA conducts qualitative (focus groups, in-depth interviews, etc.) and quantitative (mail, telephone, online, etc.) research studies for a wide array of clients.



Public Transportation

Q: Which of the following public transportation services have you used in the past month?

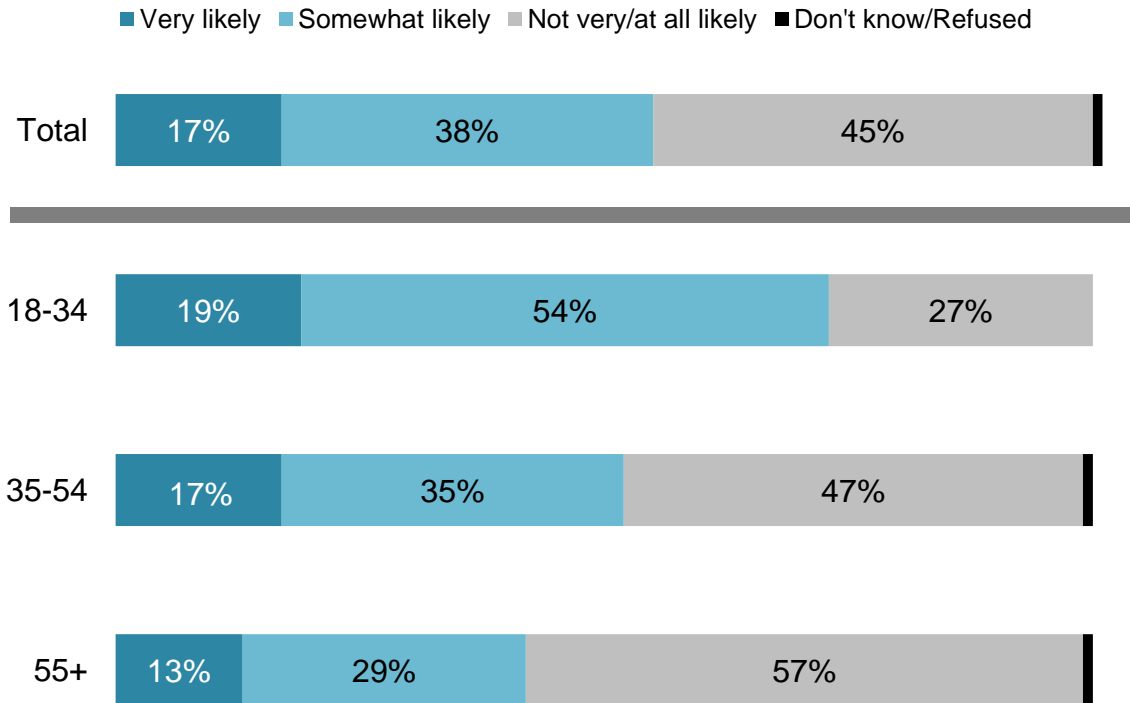
Close to one-half of the Washington, DC area residents surveyed have used any of the region's public transportation services in the past month, most often citing Metrorail.



Base= Total Sample (n=401)
Multiple Responses Accepted, Top Mentions

Q: How likely are you to consider using public transportation in the future?

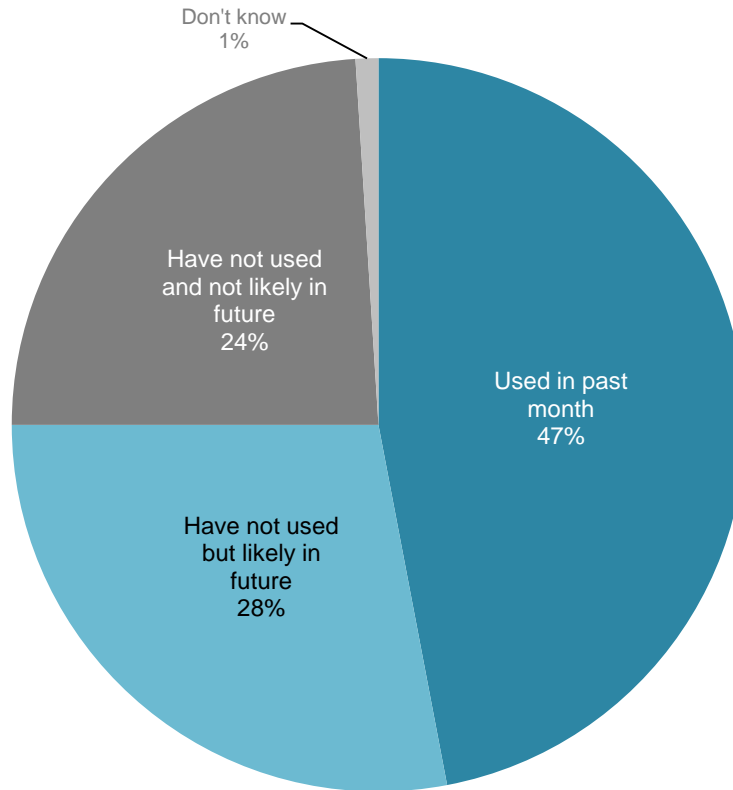
More than one-half of those who have not used public transportation in the past month (55%) say they are likely to consider doing so in the future. This proportion is almost twice as high among 18-34 year olds as compared to those age 55 and older.



Base= Those who have not used public transportation in the past month (n=212)

Q: Which of the following public transportation services have you used in the past month?
Q: How likely are you to consider using public transportation in the future?

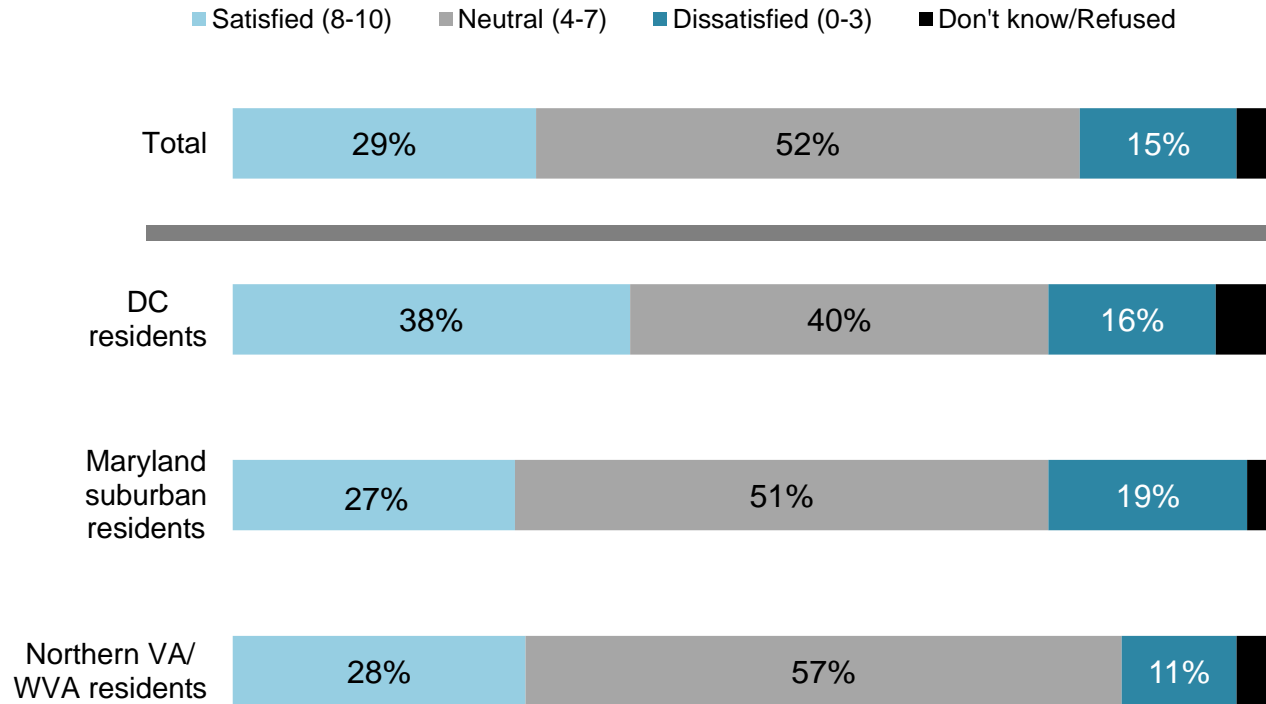
Among all Washington, DC area residents, three-fourths (75%) have either used public transportation in the past month (47%) or are likely to consider using it in the future (28%).



Base= Total Sample (n=401)

Q: How satisfied are you with the region's transportation system as a whole?

Nearly three in ten Washington, DC area residents are satisfied with the region's transportation system, giving a rating of 8-10 on a 0-10 scale. More than one-half, however, gave more neutral ratings of 4-7.

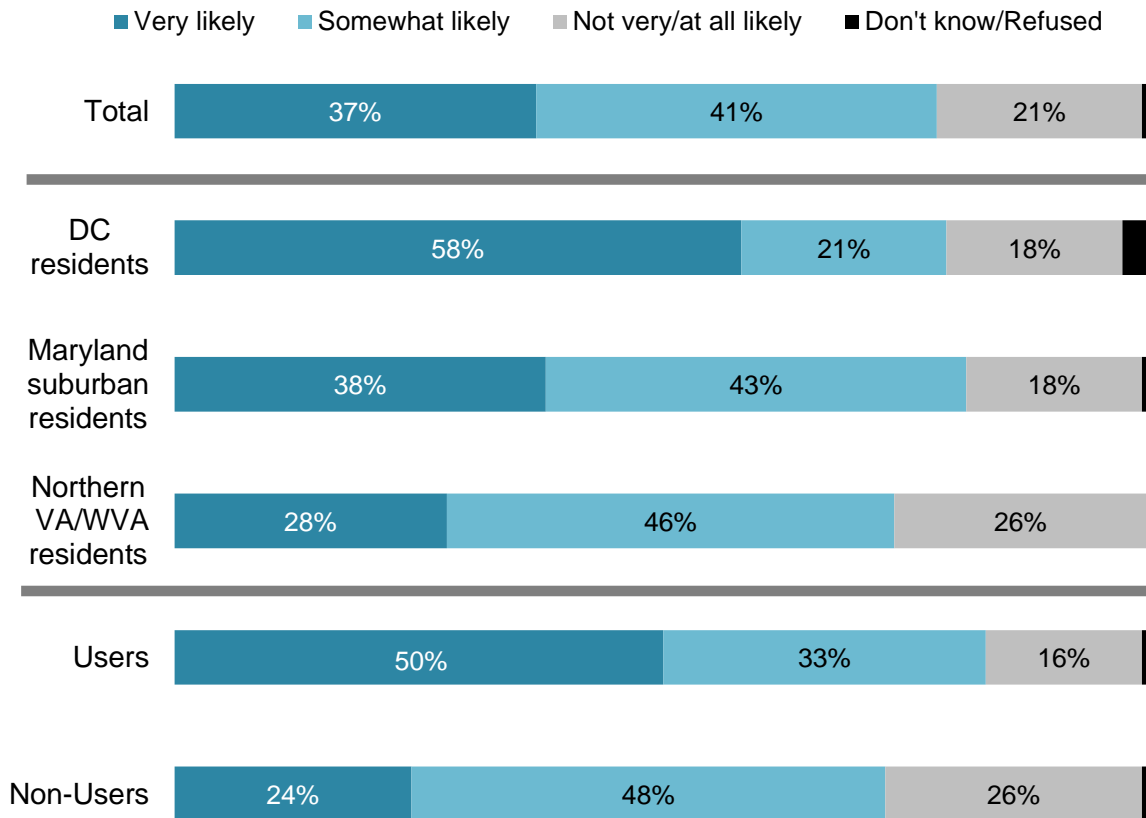


Base= Total Sample (n=401)

Q: How likely would you be to support increased Federal, State or Local funding for public transportation?*

Overall, more than three-fourths of Washington, DC area residents would be very or somewhat likely to support increased government funding for public transportation.

In fact, almost six in ten District of Columbia residents say they would be *very likely* to support such funding. Likewise, those who have used the area's public transportation in the past month are significantly more likely than non-users to say they would be *very likely* to support increased public transportation funding. Still, more than seven in ten non-users would be at least somewhat likely to support an increase.

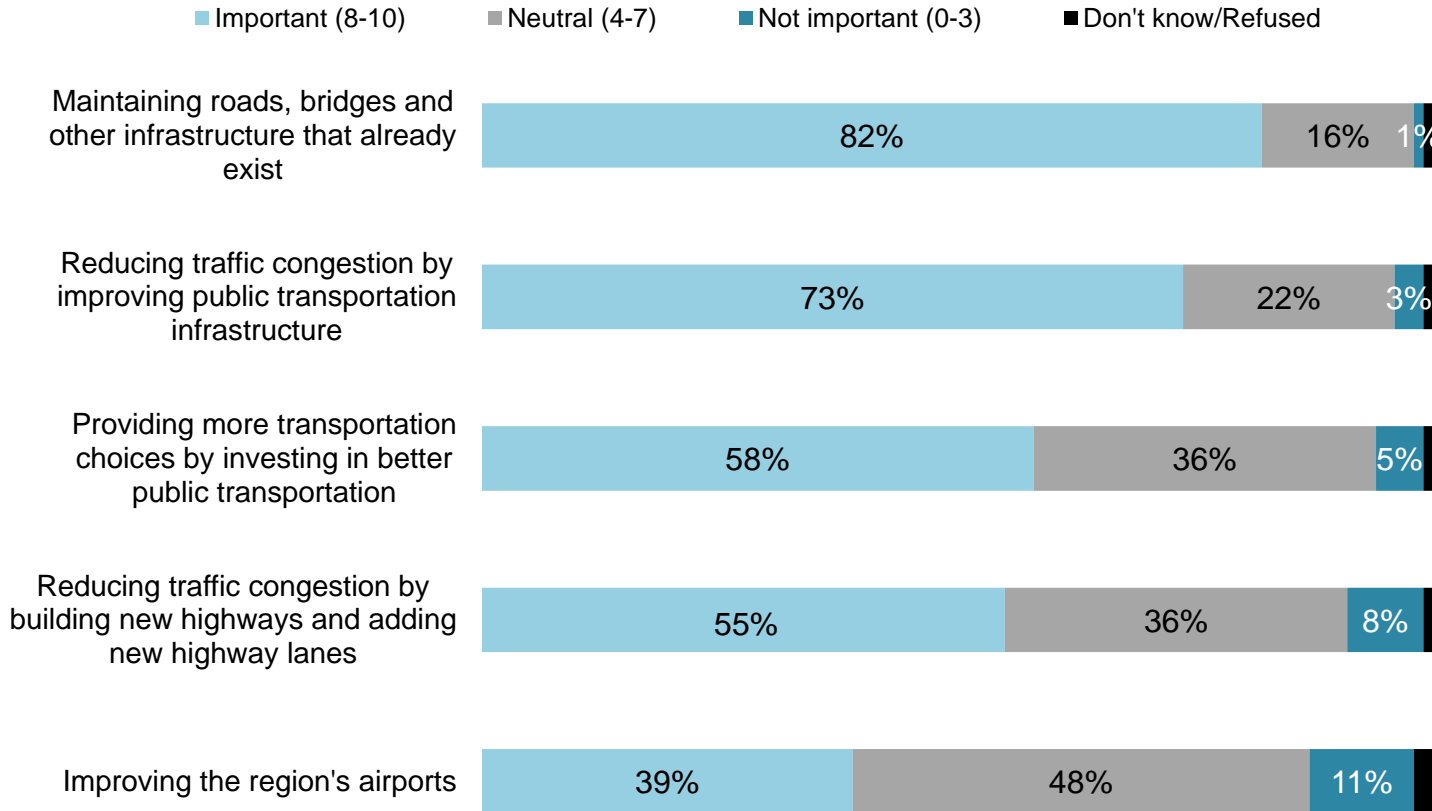


Base= Total Sample (n=401)

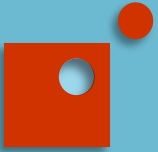
* The infographic data that accompanies this report is calculated using a base that excludes those respondents answering "Don't know" or refusing to answer.

Q: Please rate the importance of different types of projects that the region could invest in.

Maintaining existing roads and bridges, as well as reducing traffic congestion by improving public transportation, are rated as the most important types of projects that the region could invest in.



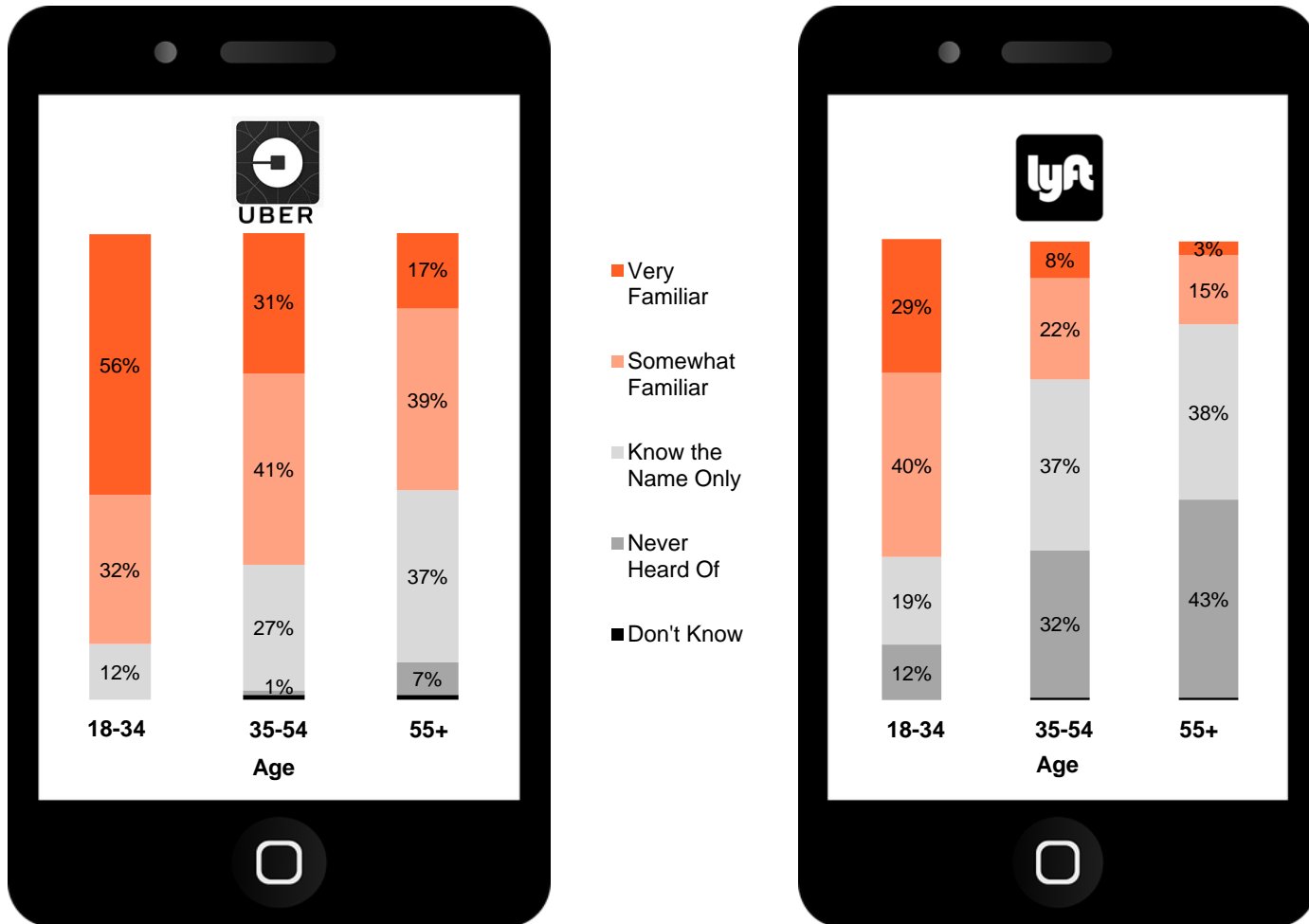
Base= Total Sample (n=401)



App-Based Transportation

Q: How familiar are you with the app-based transportation company_____?

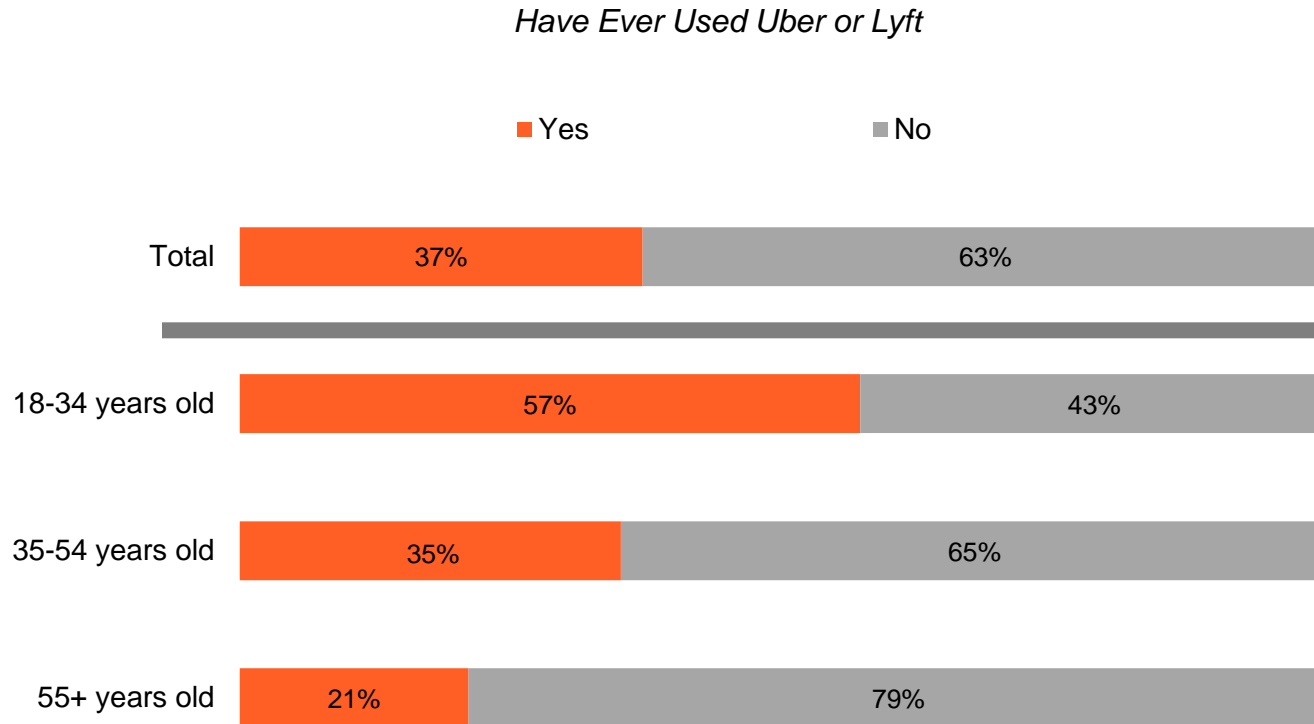
Residents of the Washington, DC region report much greater familiarity with Uber as compared to Lyft. For both companies, familiarity is driven primarily by the 18-34 year old age segment.



Base= Total Sample (n=401)

Q: Which app-based transportation companies have you ever used in the Washington, DC area?

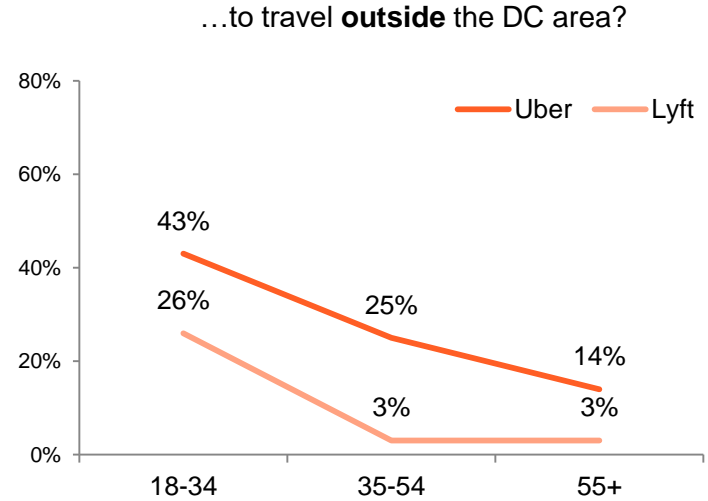
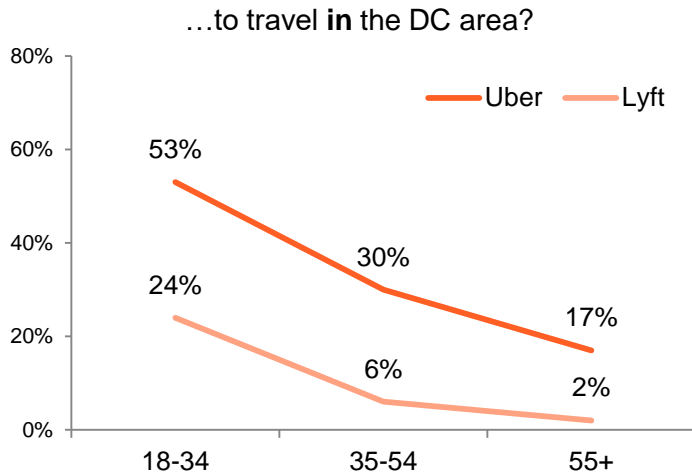
Nearly four in ten residents of the Washington, DC area have ever used Uber or Lyft. As was the case with familiarity, 18-34 year olds were significantly more likely to have taken Uber or Lyft than were those in other age groups (57% for 18-34 year olds vs. 35% for 35-54 year olds and 21% for those 55 or older).



Base= Total Sample (n=401)

Q: Which app-based transportation companies have you ever used?

Regardless of whether their travel is inside or outside the Washington, DC area, younger residents are fueling the rise of app-based transportation.

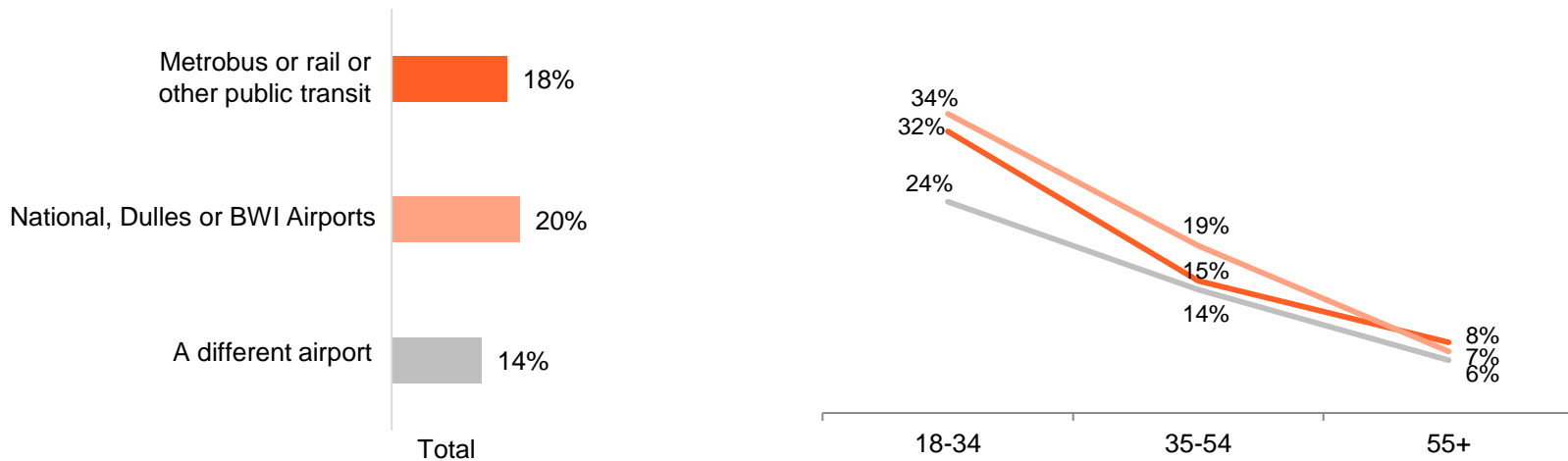


Base= Total Sample (n=401)

Q: Have you ever used an app-based transportation company to get to or from...?

Across the region, about one in five residents have used an app-based transportation company to get to or from Metrobus, Metrorail or other public transit or to Reagan National, Dulles or BWI Marshall Airports. Only slightly fewer have used a company like Uber or Lyft to get to a different airport.

Once again, the younger the resident, the more likely they are to have used app-based transportation for these reasons.

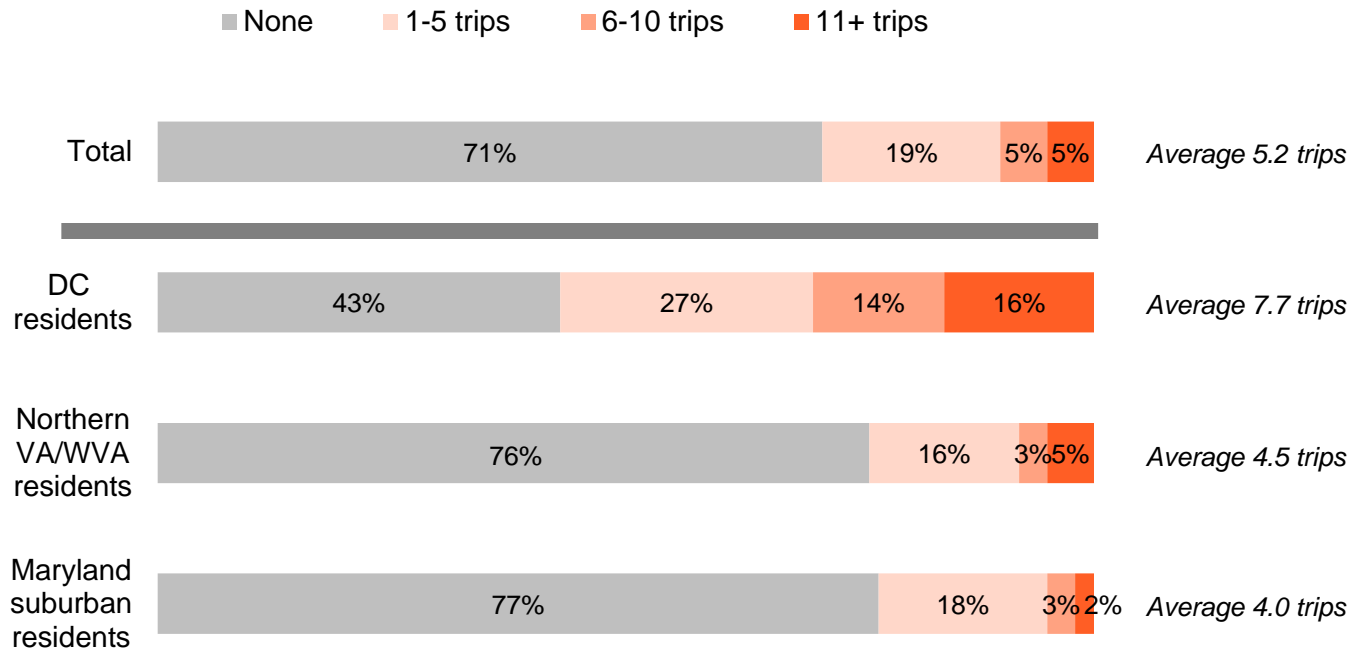


Base= Total Sample (n=401)

Q: On average, about how many times a month do you use an app-based transportation company?

Residents of the District of Columbia are significantly more likely than their suburban counterparts to have taken any trips using an app-based transportation company in the past month (57% vs. 23%-24%).

DC residents who have taken trips also average almost eight one-way trips per month, compared to between four and five among the area's suburban riders.



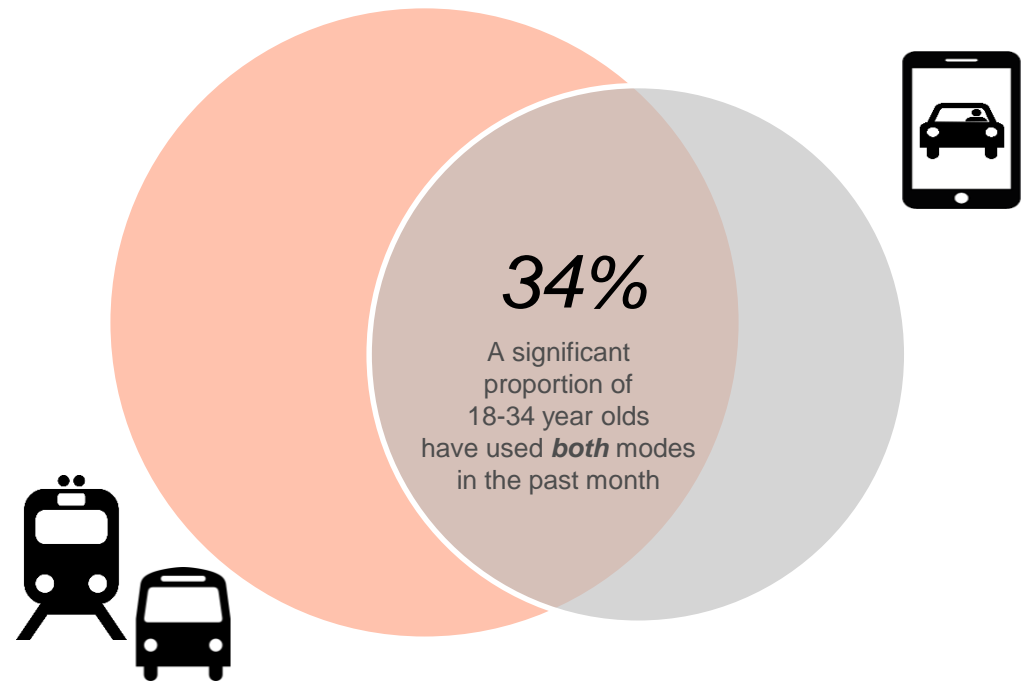
Base= Total Sample (n=401)
Average based among those who have used an app-based transportation company (n=116)

Q: When was the last time you used an app-based transportation company?

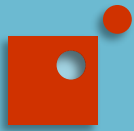
Q: Which of the following public transportation services have you used in the past month?

Among 18-34 year old residents of the Washington, DC area, app-based transportation ridership approaches levels similar to that of public transportation ridership. In fact, there is significant overlap in ridership between the two modes.

Transportation Used in Past Month		
AGE	Public	App-Based
18-34	55%	48%
35-54	46%	16%
55+	43%	8%

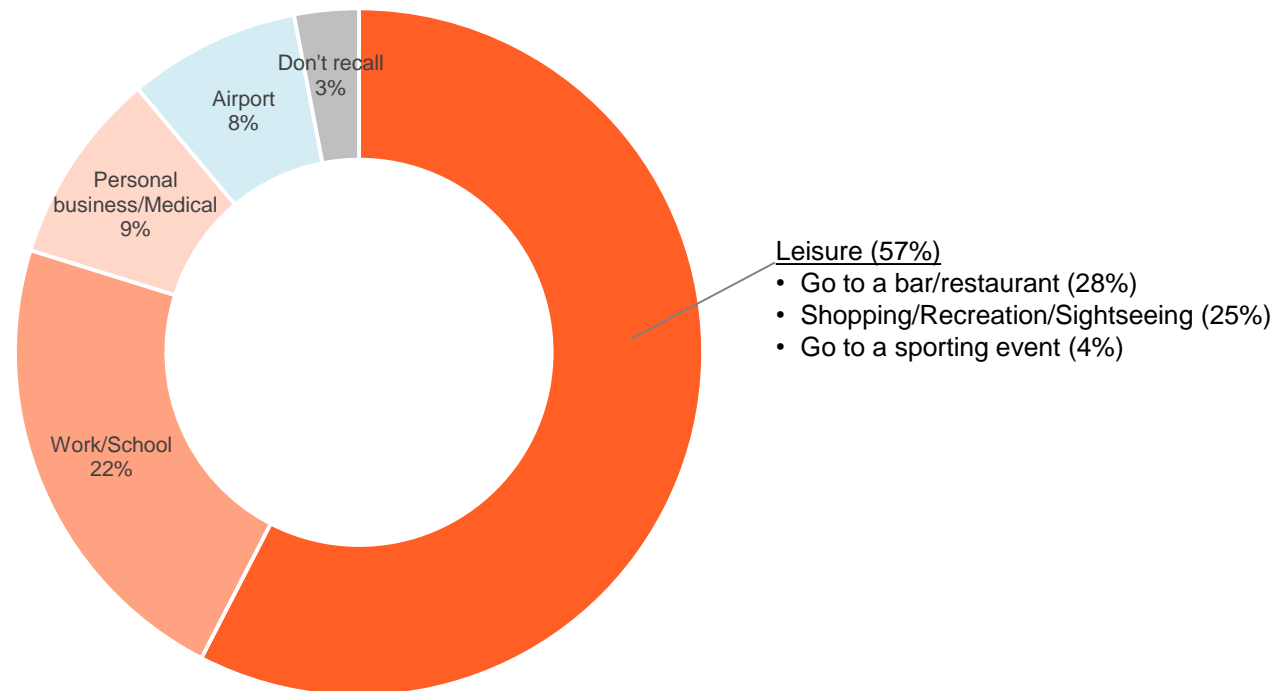


Base= Total Sample (n= 401)



Q: What was the purpose of the last trip you took using app-based transportation?

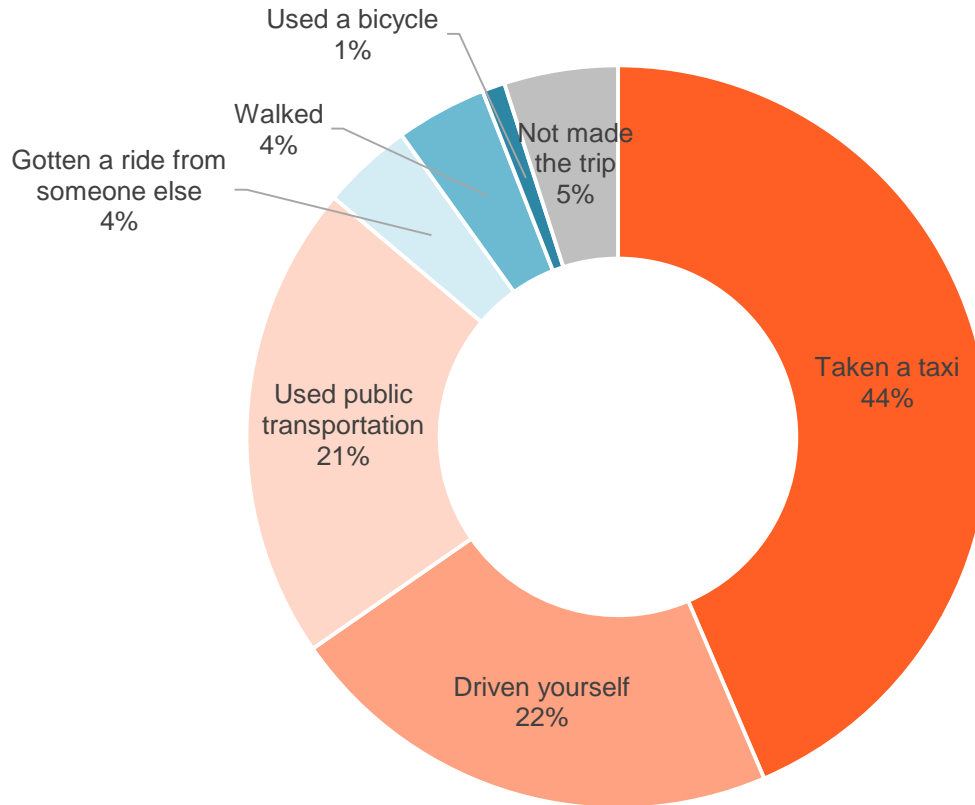
Those who have used app-based transportation in the past three months most often said their last such trip was for leisure purposes (57%), while almost one-fourth took their last trip to or from work, school, or for some other business related purpose.



Base= Those who have used app-based transportation in the past three months (n=81)

Q: If an app-based transportation company were not available, how would you have made that trip?

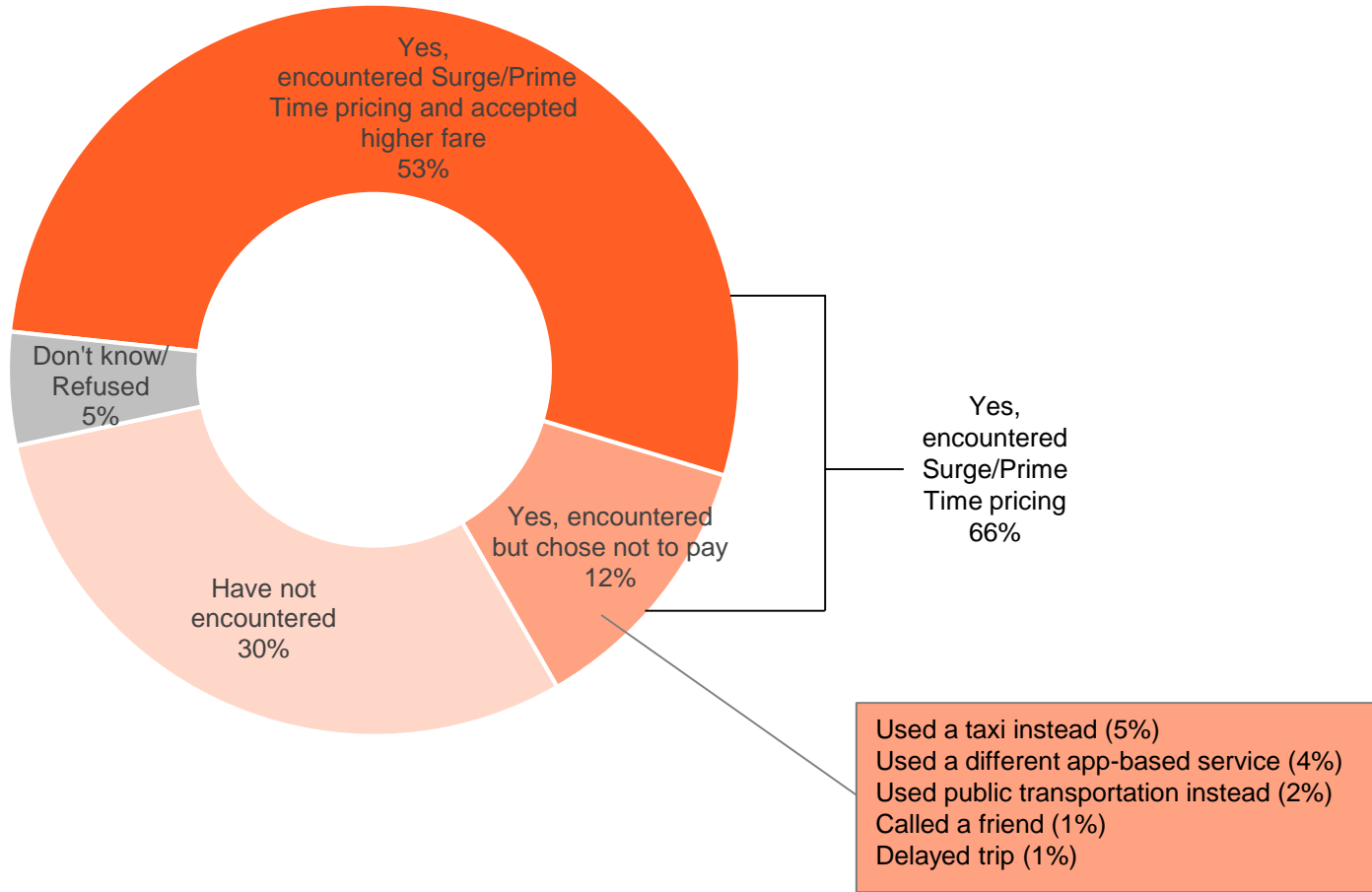
Those who have used app-based transportation in the past three months most often said they would have taken a taxi if an app-based transportation company had not been available for their last trip.



Base= Those who have used app-based transportation in the past three months (n=81)

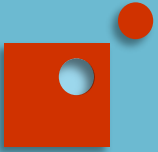
Q: Have you encountered Surge/Prime Time pricing? Q: Did you use Uber/Lyft despite Surge/Prime Time pricing?*

More than one-half of those who have used Uber or Lyft say they have encountered Surge or Prime Time pricing and chose to take the trip anyway, accepting the higher fare.



Base= Those who have used Uber or Lyft (n=81)

* The infographic data that accompanies this report is calculated using a base that includes only those who have encountered Surge/Prime Time pricing.

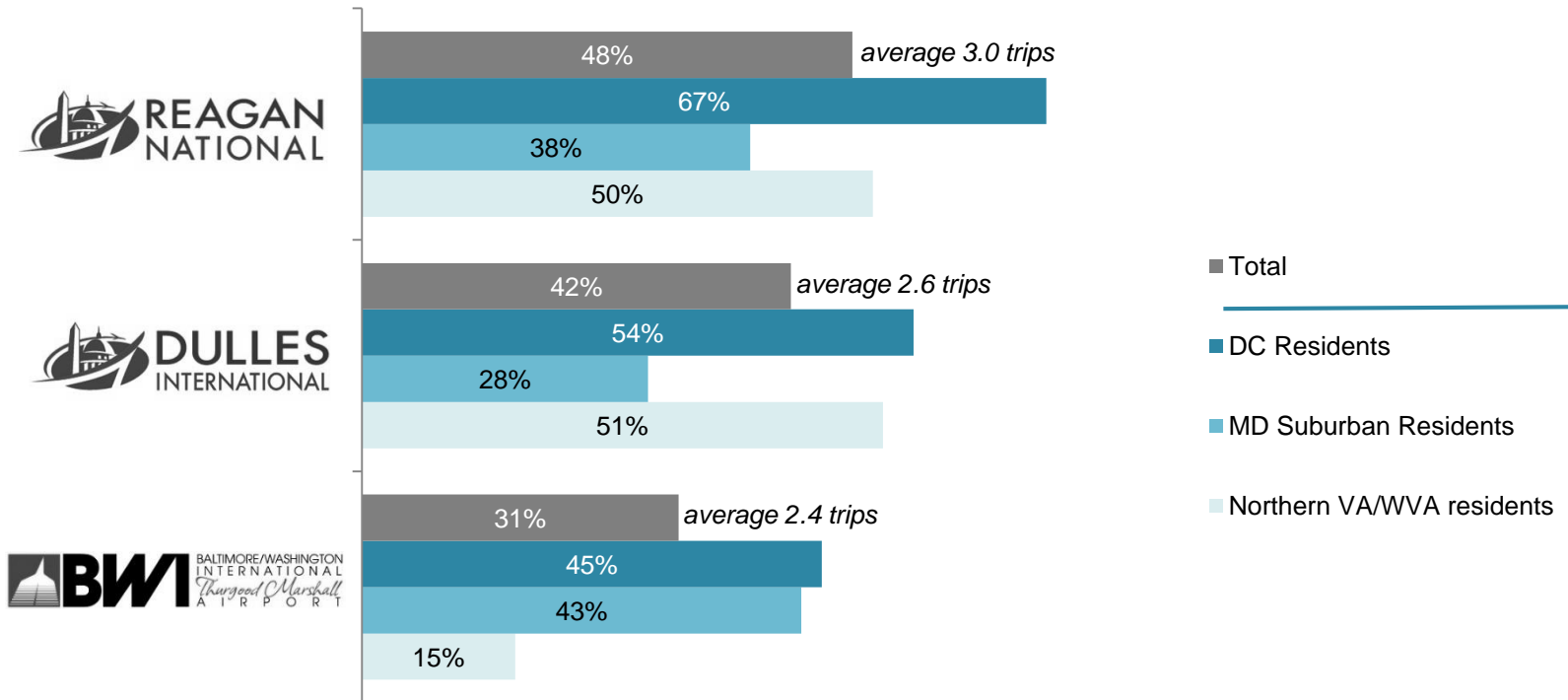


Airports

Q: How many trips requiring air transportation that originated from _____ have you taken in the past 12 months?

Usage of the three Washington, DC area airports varies widely by specific area of residence. Overall, though, more than four in ten Washington area residents have flown out of Reagan National or Dulles in the past 12 months, and about three in ten have flown out of BWI Marshall.

% Who Have Taken ANY Trips From Each Airport:



Base=Total Sample (n= 401)
 Average number of trips calculated among those who took any trips from that airport
 (DCA n= 182, IAD n=173, BWI n=110)

Q: How many trips requiring air transportation that originated from _____ have you taken in the past 12 months?

While four in ten residents used more than one airport in the past 12 months, about three in ten used just one airport during this time.

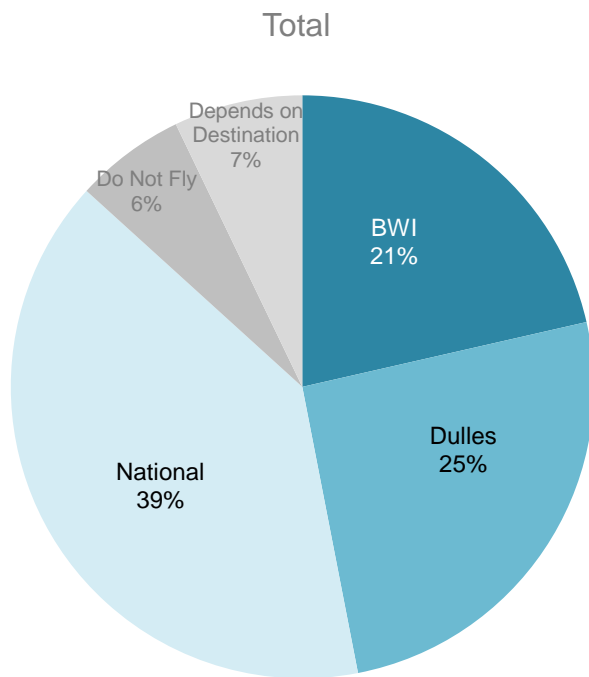
	Total	DC Residents	MD Suburban Residents	Northern VA/WVA Residents
Took any trips from BWI, National or Dulles	70%	81%	65%	70%
Net: Used only one airport	29%	21%	29%	32%
BWI only	7%	1%	17%	<1%
National only	10%	11%	6%	13%
Dulles only	12%	9%	6%	19%
Used multiple airports	40%	60%	35%	38%
Used all three airports	11%	25%	10%	8%
Took no trips	30%	19%	35%	30%

Base = Total Sample (n= 401)

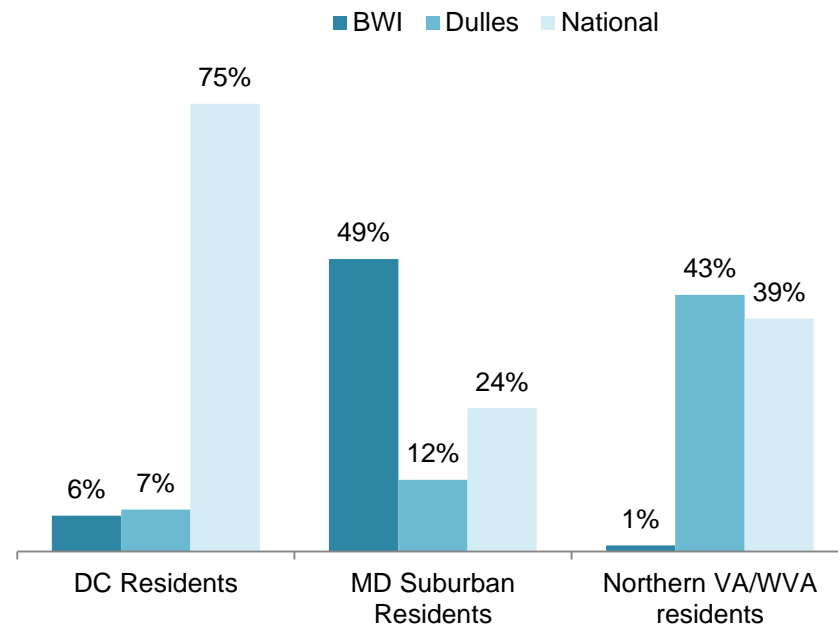
Q: Regardless of the airline, given a choice of taking a flight out of either Dulles, National or BWI, which of these three airports would you prefer?

Airport preference from among the three Washington, DC area airports varies widely by specific area of residence. Overall, though, almost four in ten Washington, DC area residents prefer Reagan National, and two in ten prefer Dulles or BWI Marshall.

Preferred Airport*



By Area of Residence

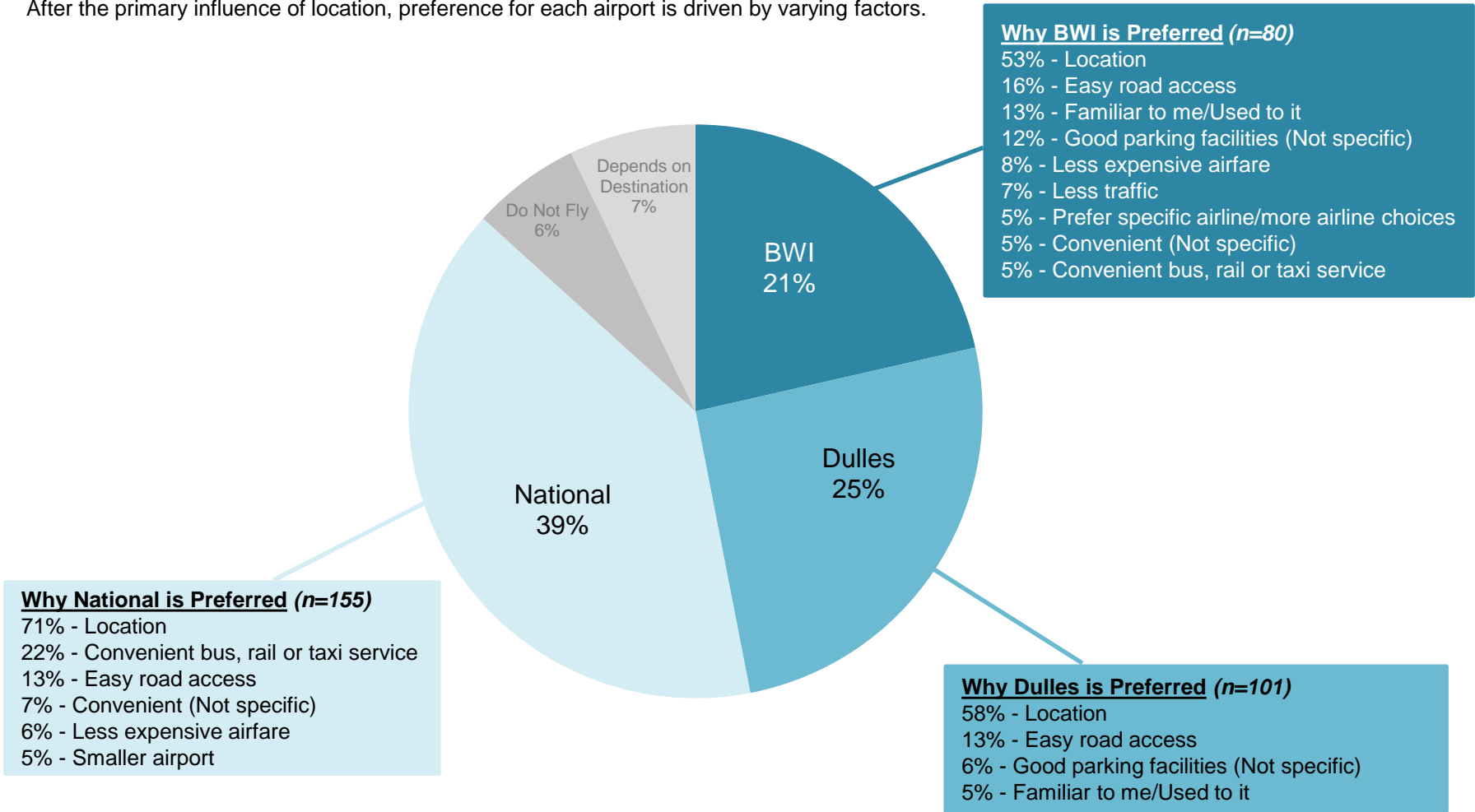


Base= Total Sample (n=401)

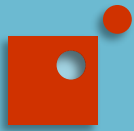
* The chart corresponding to this question from the infographic that accompanies this report is calculated using a base that excludes those respondents who do not fly and those answering "Don't know" or refusing to answer.

Q: Why do you prefer to fly from _____?

After the primary influence of location, preference for each airport is driven by varying factors.



Multiple Responses Accepted, Top Mentions



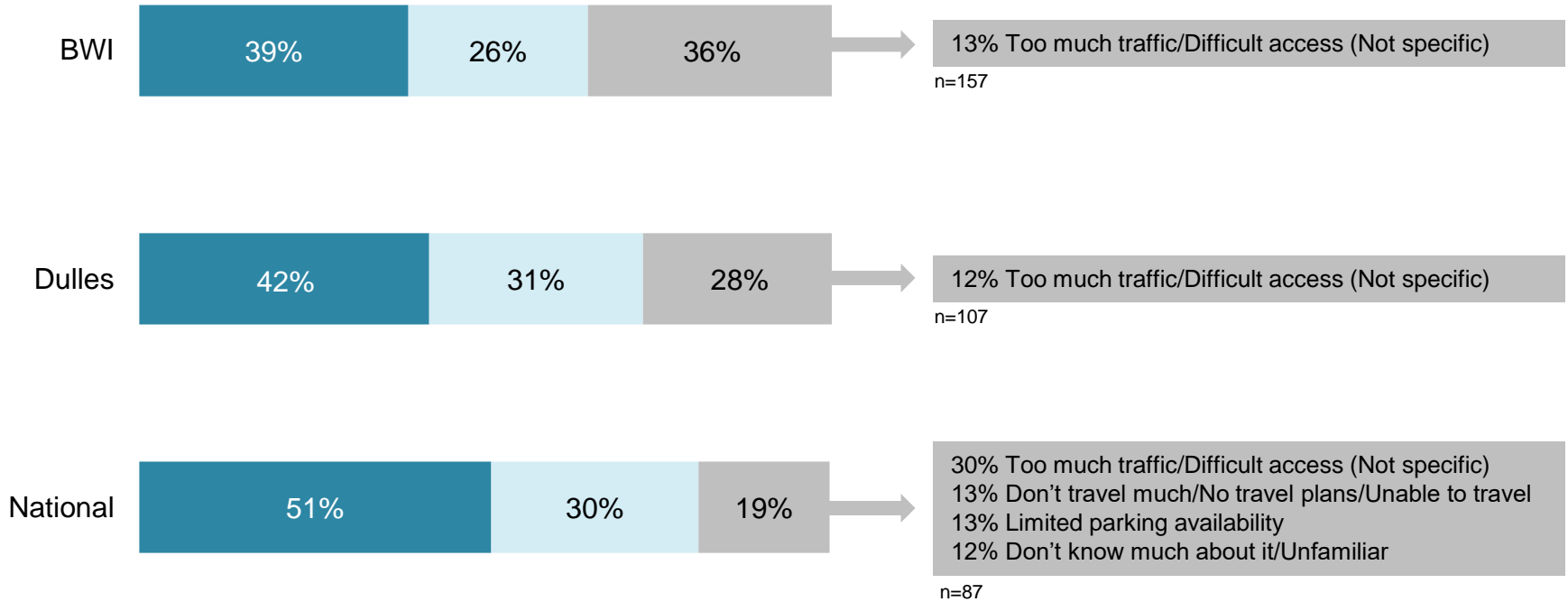
Q: How likely are you to consider using each area airport in the future?

Q: Other than location, why are you not likely to consider using ___?

Area Residents

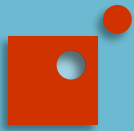
Residents of DC and its suburbs are most likely to consider using Reagan National in the future. Other than location, respondents most commonly mentioned traffic and difficult access to the airports as the primary deterrent to considering using each of the three airports.

■ Very likely ■ Somewhat likely ■ Not very/at all likely



Base= Those who fly and answering (n=373-374)

Base= Those answering who are not likely to consider using Airport
Multiple Responses Accepted, Top Mentions



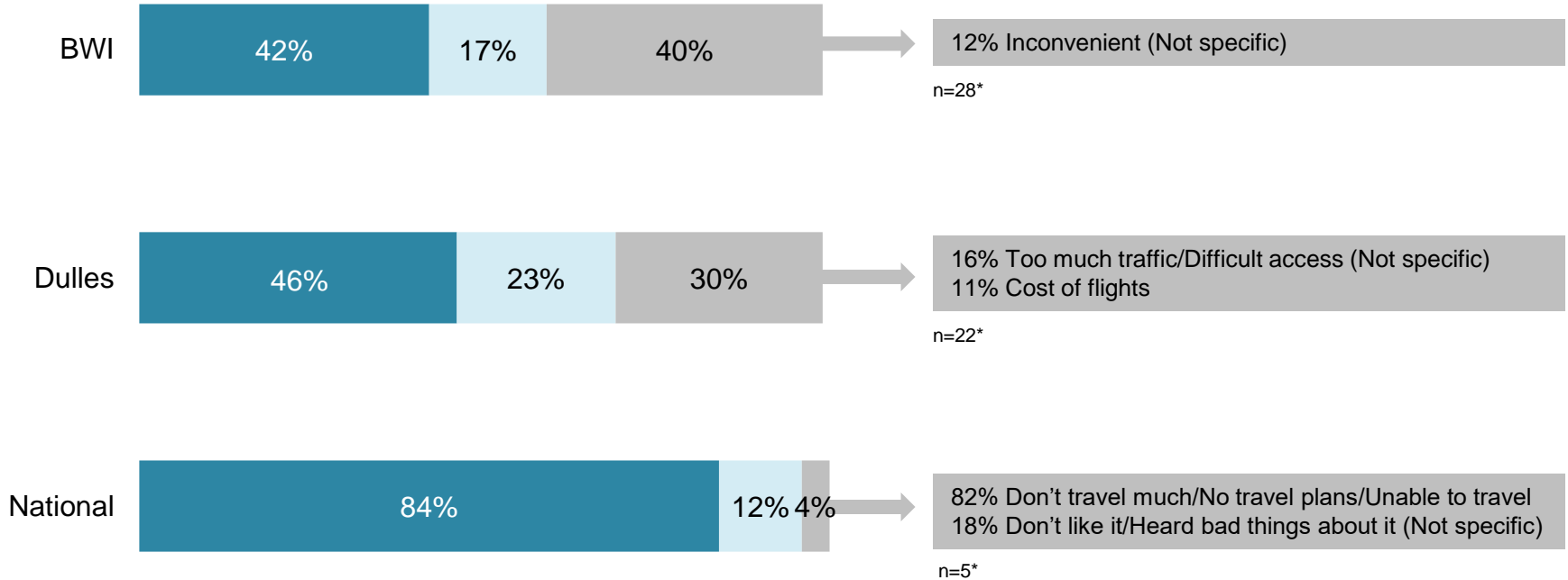
Q: How likely are you to consider using each area airport in the future?

Q: Other than location, why are you not likely to consider using ___?

Washington, DC Residents

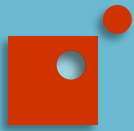
Residents of the District of Columbia are most likely to consider using Reagan National in the future. Even when controlling for location, those not likely to use BWI Marshall most often explained that it is inconvenient, while those not likely to use Dulles attribute it most often to traffic and/or the cost of flights.

Very likely Somewhat likely Not very/at all likely



Base= DC residents who fly and answering (n=57-58)

Base= Those answering who are not likely to consider using Airport
Multiple Responses Accepted, Top Mentions
*Caution: Small Base



Q: How likely are you to consider using each area airport in the future?

Q: Other than location, why are you not likely to consider using ___?

Maryland Suburban Residents

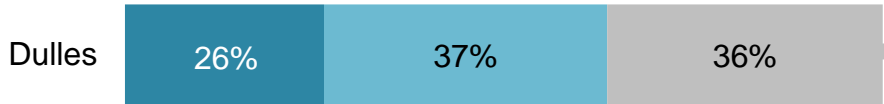
Residents of the Maryland suburbs of Washington, DC are most likely to consider using BWI Marshall in the future. Other than location, traffic and difficult access to the airports is the number one deterrent to considering using any of the three airports.

■ Very likely ■ Somewhat likely ■ Not very/at all likely



13% Too much traffic/Difficult access (Not specific)
 12% Don't know much about it/Unfamiliar
 12% Don't travel much/No travel plans/Unable to travel
 11% Experience with delayed flights

n=21*



11% Too much traffic/Difficult access (Not specific)

n=54

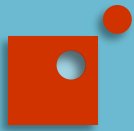


34% Too much traffic/Difficult access (Not specific)
 17% Limited parking availability
 14% Don't know much about it/Unfamiliar
 10% Cost of flights

n=46

Base= Maryland Suburban residents who fly and answering (n=144-145)

Base= Those answering who are not likely to consider using Airport
Multiple Responses Accepted, Top Mentions
*Caution: Small Base

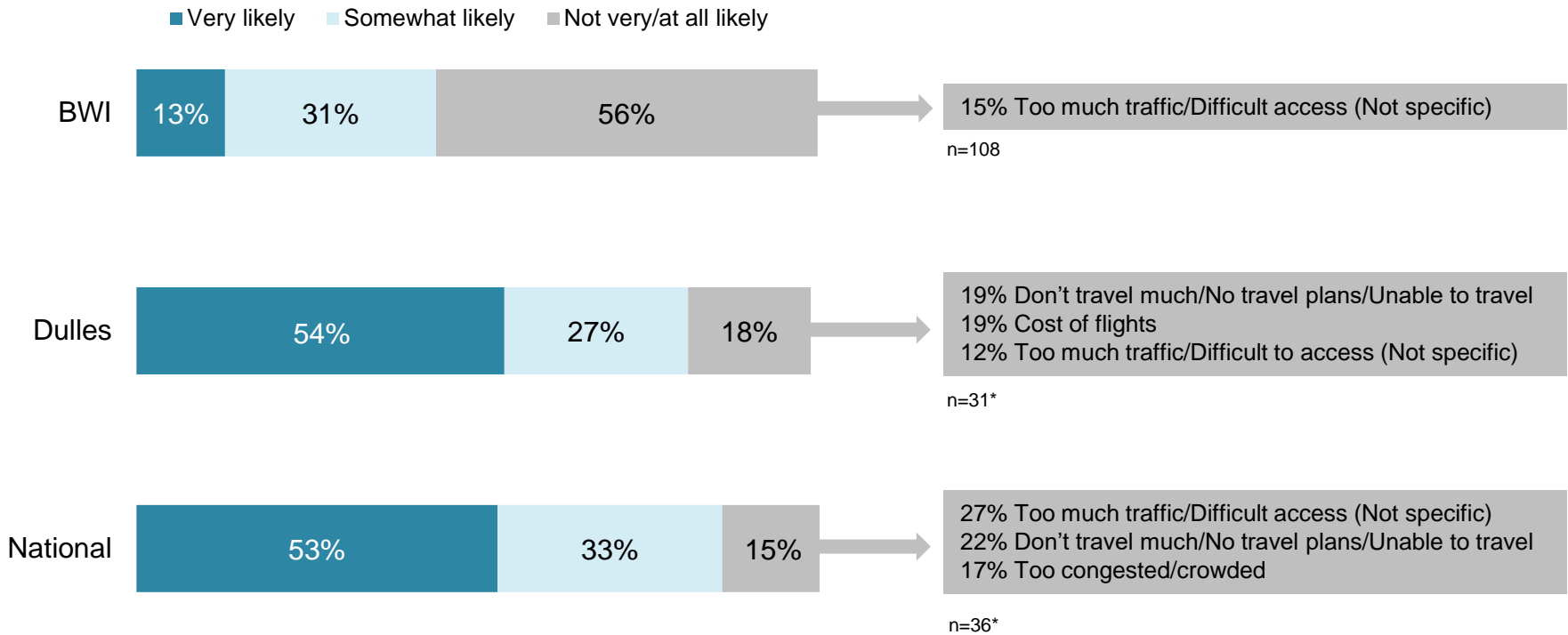


Q: How likely are you to consider using each area airport in the future?

Q: Other than location, why are you not likely to consider using ___?

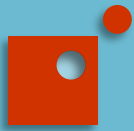
Northern Virginia/West Virginia Residents

Residents of the Northern Virginia/West Virginia suburbs of Washington, DC are equally likely to consider using Reagan National and/or Dulles in the future. Traffic and difficult access to the airport is the primary deterrent to likelihood of using BWI Marshall in the future.



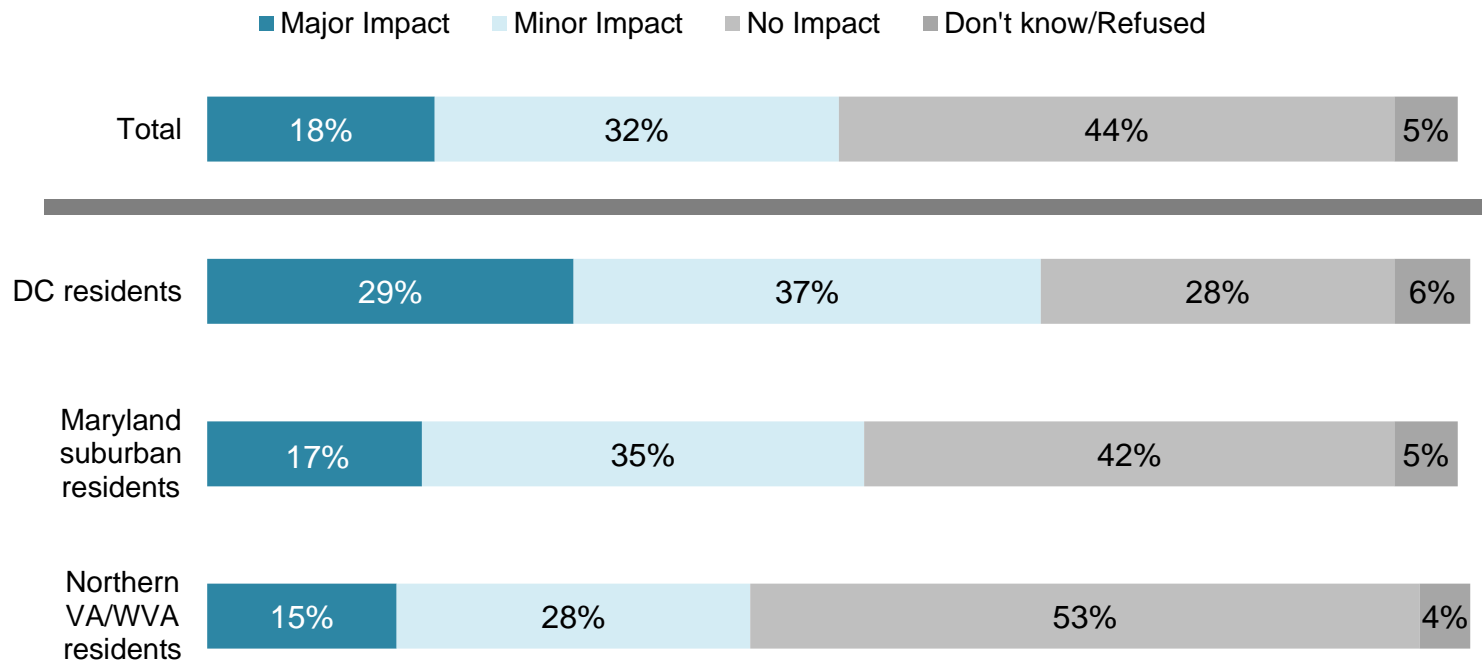
Base= Virginia residents who fly and answering (n=170-172)

Base= Those answering who are not likely to consider using Airport
Multiple Responses Accepted, Top Mentions
*Caution: Small Base

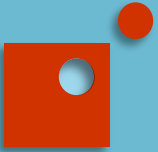


Q: What impact has the opening of the first phase of the Silver Line of Metro had on which airport you prefer?

Across the region, one-half of area residents say that the opening of the first phase of the Silver Line of Metro impacted their airport preference. The greatest impact was among residents of the District of Columbia itself (65% impacted).



Base= Those who used any airport (n=271)



Appendix



Contact information

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Standard Error of the Data

A sample size of 401 will yield data that has a maximum fluctuation of ± 4.9 percentage points at the 95% confidence level. However, the actual standard error may be smaller, depending on the data being examined. Standard errors are shown below for various study percentages, at the 95% confidence level:

	40%	30%	20%	10%	1%	
If the percentage found is around:	50%	60%	70%	80%	90%	99%
Then, the standard error in percentage points for a Total Sample of n = 401 is:	± 4.9	± 4.8	± 4.5	± 3.9	± 2.9	± 1.0

For example, if a question yielded a percentage of 20%, then we can be sure 95 out of 100 times that the true percentage would lie between 16.1 and 23.9% (20% ± 3.9 percentage points).