

Prepared by:



Summer 2016



Public Transportation pages 4-10

- Two-thirds (67%) of Maryland residents have either used public transportation in the past month (42%) or are likely to consider doing so in the future (25%), with those in Maryland's DC suburbs more likely than those in the Baltimore areas to do both. pages 4-7
- Satisfaction with the region's transportation system shows room for improvement. Only 23% of Maryland residents are satisfied (rated 8-10 on a 0-10 scale), while 53% gave more neutral ratings of 4-7. page 8
- Support for increased government funding of public transportation is high—77% of Maryland residents say they would be very or somewhat likely
 to support an increase. Support is strong in both the Baltimore area and among those in Maryland's Washington DC suburbs. 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 (49% vs.
 22%), even the majority of non-users (70%) would at least be somewhat likely to support an increase. page 9
- Maintaining existing roads and bridges (84% 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 Maryland, familiarity with app-based transportation companies (otherwise known as transportation network companies, or TNCs) Uber and Lyft is driven primarily by those who live in Baltimore City and Baltimore County (45%-50% very familiar with Uber). page 12
- While just over one-third of Maryland residents have ever used Uber or Lyft, almost one-half of those who reside in Baltimore City have done so (49%). Baltimore City residents are significantly more likely than their suburban counterparts to have taken any trips using an app-based transportation company in the past month (37% vs. 23%-29%). page 13-16
- Leisure purposes (bars, restaurants, shopping, sports events, etc.) are most frequently cited as the purpose of app-based transportation users' most recent trip (59%), followed by trips for work or school (28%). page 17
- Taxi is most often the back up when app-based transportation is not available (34%). About one-fifth, however, would drive themselves (24%) or turn to public transportation (19%). Page 18

Airports pages 21-26

- More than six in ten Maryland residents (63%) have taken a trip from BWI Marshall (53%), Reagan National (25%) or Dulles (22%) in the past 12 months. In fact, three in ten Maryland residents have only flown out of BWI Marshall (30%). Air travelers residing in Maryland's Washington DC suburbs are more likely than those in the Baltimore area to have taken trips from Reagan National (38% vs. 13%) or Dulles (28% vs. 16%).
- Airport preference is strongest for BWI Marshall (69%) regardless of whether you live in the Baltimore area (88%) or in Maryland's Washington DC suburbs (49%). As such, the vast majority of Baltimore area residents (74%) are very likely to consider using BWI Marshall in the future. Those few who are not likely to consider BWI Marshall are most likely to say that they simply do not travel much. pages 23-25
- Across the state, 44% 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 Maryland's Washington DC suburbs (52% impacted). page 26





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 MarkeTrak® study was conducted in the Washington, DC and Baltimore, MD metropolitan areas through a random telephone and online survey of 801 respondents. This "Transportation in Maryland" report provides results only for 554 Maryland respondents.*



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.

*Note: For purposes of this report Maryland respondents include those who reside in the counties outlined on this map. These communities include more than 87% of the State's population.

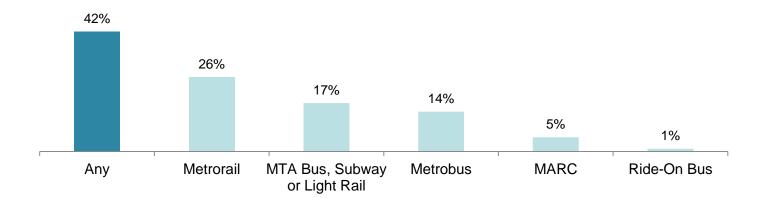






Q: Which of the following public transportation services have you used in the past month?

More than four in ten Maryland residents surveyed (42%) have used any of the region's public transportation services in the past month, most often citing Metrorail.



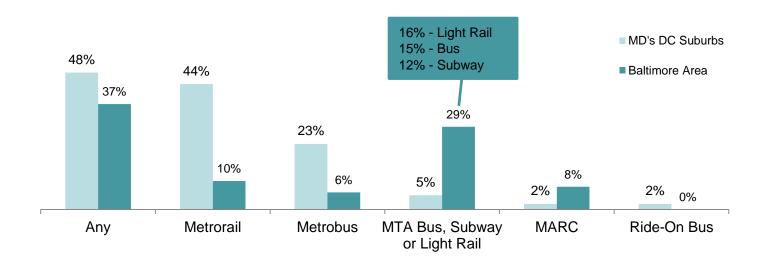
Base= Total Sample (n=554) Multiple Responses Accepted, Top Mentions





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

Residents of Maryland's Washington, DC suburbs are more likely than those in the Baltimore area to have used the region's public transportation services in the past month.



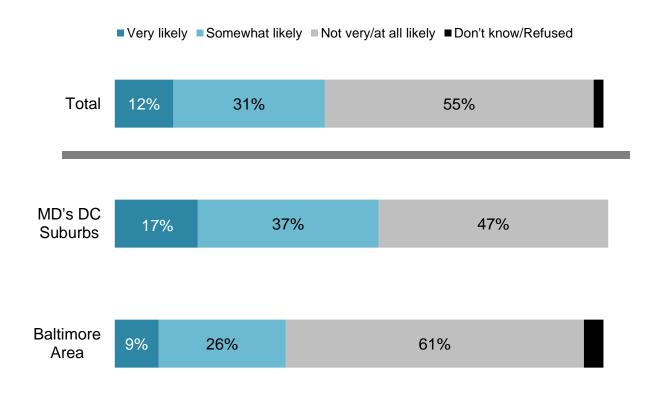
Base= Total Sample (n=554)
Multiple Responses Accepted, Top Mentions





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

More than one-half of those who reside in Maryland's Washington, DC suburbs who have <u>not</u> used public transportation in the past month (54%) say they are very or somewhat likely to consider doing so in the future, while just over one-third (35%) of those who reside in the Baltimore area say the same.



Base= Those who have not used public transportation in the past month (n=274)

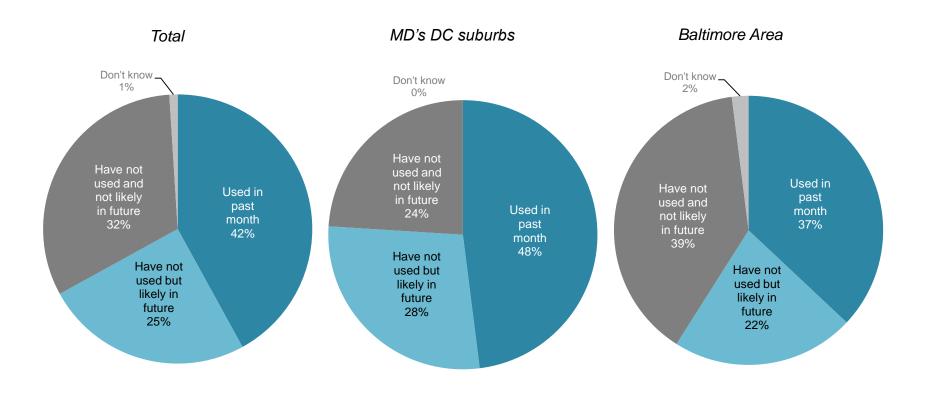




Q: Which of the following public transportation services have you used in the past month?

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

Among Maryland residents, two-thirds (67%) have either used public transportation in the past month (42%) or are likely to consider using it in the future (25%). These proportions are higher for those who live in the Maryland's Washington, DC suburbs than among those from the Baltimore area (76% vs 59%).



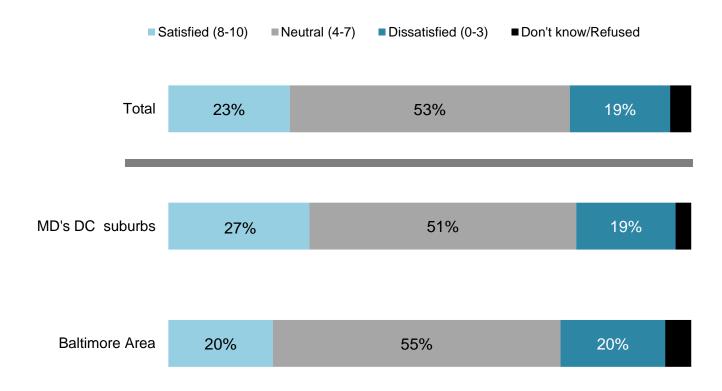
Base= Total Sample (n=554)





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

Only one-fourth of the Maryland residents (23%) are satisfied with the region's transportation system, giving a rating of 8-10 on a 0-10 scale. More than one-half (53%), however, gave more neutral ratings of 4-7.



Base= Total Sample (n=554)

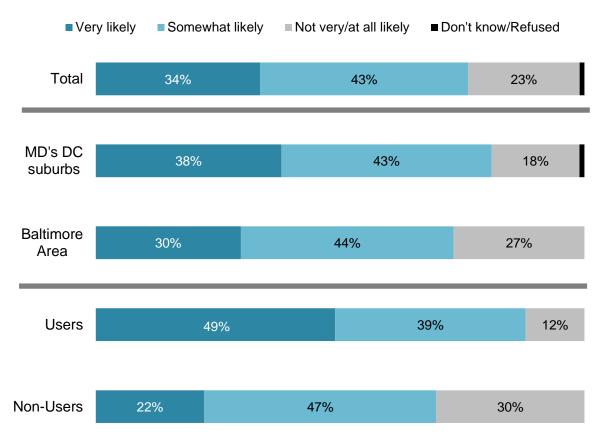




Q: How likely would you be to support increased Federal, State or Local funding for public transportation?*

Overall, more than three-fourths of Maryland residents (77%) would be very or somewhat likely to support increased government funding for public transportation.

In fact, more than eight in ten residents of Maryland's Washington, DC suburbs (81%) say they would be *very or somewhat likely* to support such funding. Likewise, more than eight in ten of those who have used the area's public transportation in the past month (88%) say they would be *likely* to support increased public transportation funding. Still, almost seven in ten non-users (69%) would be at least somewhat likely to support an increase.





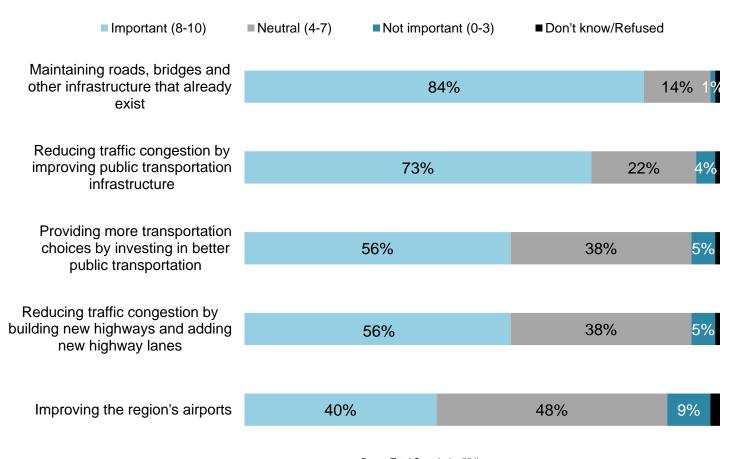
^{*} The infographic data that accompanies this report is calculated using a base that excludes those respondents answering "Don't know" or refusing to answer.





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 state could invest in.





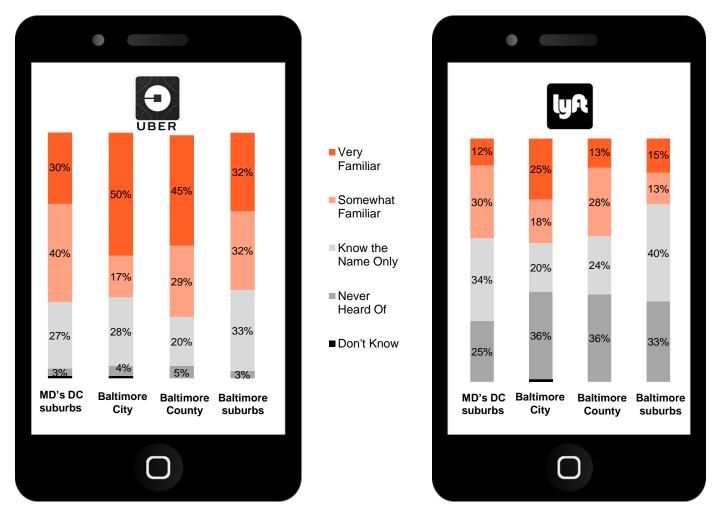


App-Based Transportation



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

Residents of Maryland report much greater familiarity with Uber as compared to Lyft. For Uber, familiarity is driven by those who reside in Baltimore City and County.



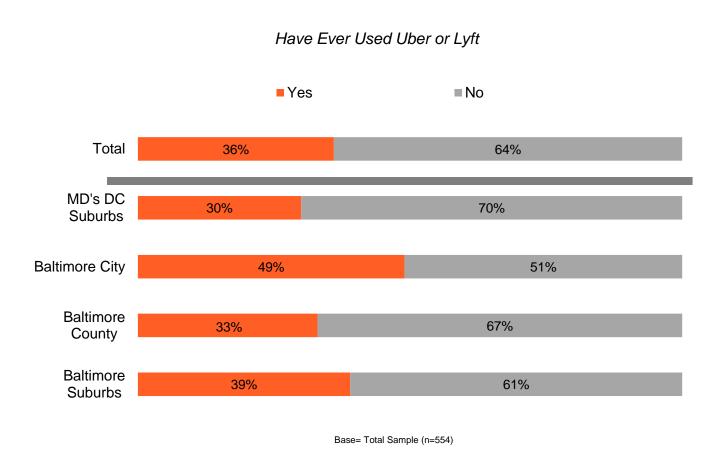






Q: Which app-based transportation companies have you ever used in the Washington, DC area?

Just over one-third of Maryland residents have ever used Uber or Lyft, with almost one-half of Baltimore City residents (49%) having done so.





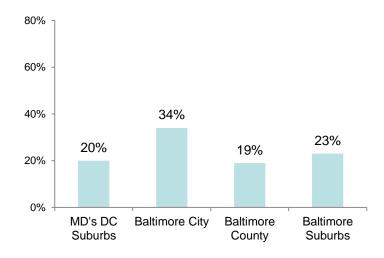


Q: Which app-based transportation companies have you ever used?

Regardless of whether their travel is inside or outside the area, Baltimore City residents are most likely to be fueling the rise of app-based transportation in Maryland.

...to travel in the area? 80% 60% 47% 40% 32% 29% 27% 20% 0% MD's DC **Baltimore City Baltimore Baltimore** Suburbs County Suburbs





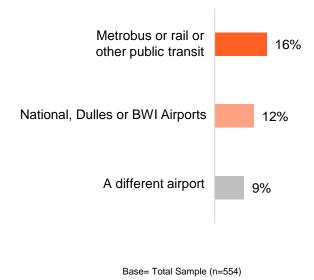
Base= Total Sample (n=554)





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

Across Maryland, about one in six residents have used an app-based transportation company to get to or from public transit. Slightly fewer have used a company like Uber or Lyft to get to or from Reagan National, Dulles or BWI Marshall Airports or a different airport.

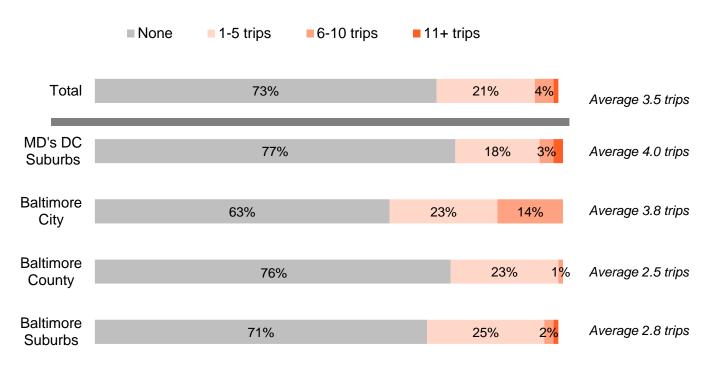






Q: On average, about how many times a month do you use an app-based transportation company?

Residents of the Baltimore City are more likely than their suburban counterparts to have taken any trips using an app-based transportation company in the past month (37% vs. 24%-29%).



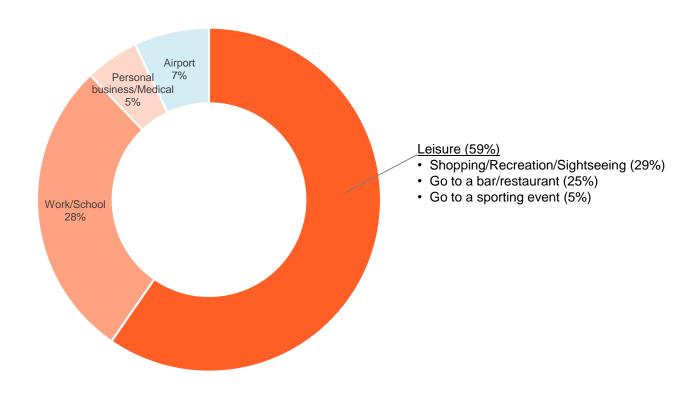
Base= Total Sample (n=554)
Average based among those who have used an app-based transportation company (n=116)





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 (59%), while more than one-fourth took their last trip to or from work, school, or for some other business related purpose.



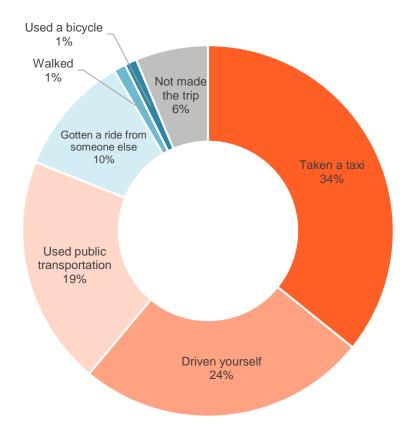
Base= Those who have used app-based transportation in the past three months (n=81)





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)

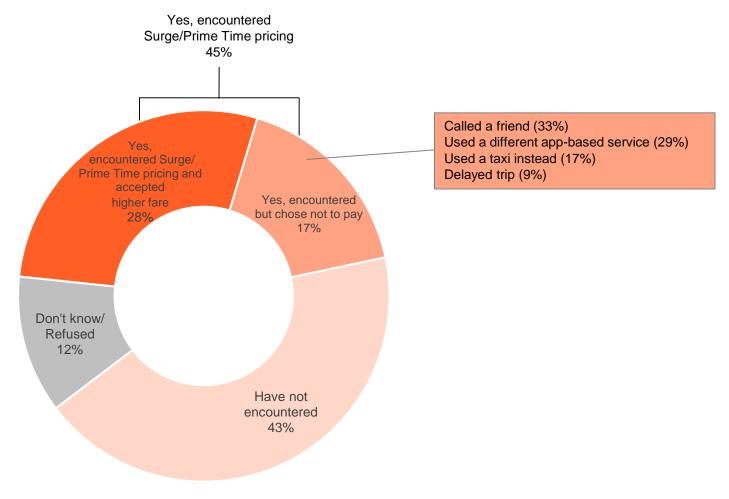




Q: Have you encountered Surge/Prime Time pricing?

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

More than one-fourth 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)



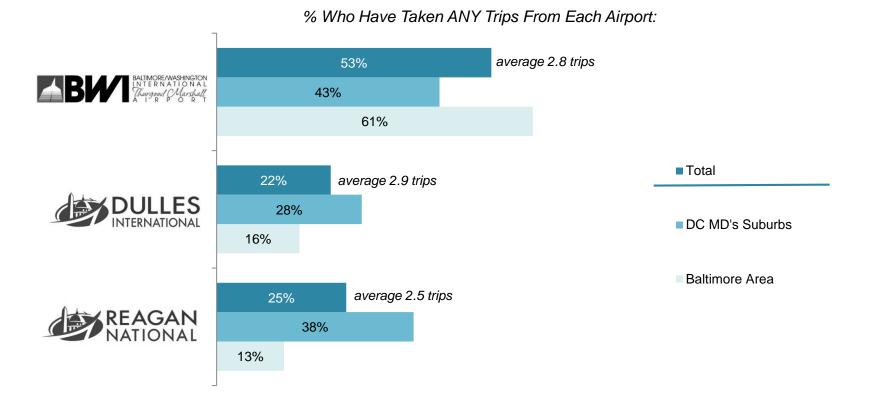
^{*} The infographic data that accompanies this report is calculated using a base that includes only those who have encountered Surge/Prime Time pricing.





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

Usage of the three area airports varies by area of residence. Overall, though, more than one-half of Maryland residents (53%) have flown out of BWI Marshall airport in the past 12 months, and just two in ten (22%) have flown out of Reagan National or Dulles airports.



Base=Total Sample (n=554)
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 more than one-fourth Maryland residents (27%) used more than one airport in the past 12 months, more than one-third (36%) used just one airport during this time. Baltimore area residents are most likely to have only used BWI Marshall Airport (40%), while those who reside in Maryland's Washington, DC suburbs are most likely to use multiple airports (35%).

	Maryland	MD's DC Residents	Baltimore Area	
Took any trips from BWI, National or Dulles	63%	65%	62%	
Net: Used only one airport	36%	29%	41%	
BWI only	30%	18%	40%	
National only	3%	6%	0%	
Dulles only	3%	6%	1%	
Used multiple airports	27%	35%	20%	
Used all three airports	9%	10%	8%	
Took no trips	37%	35%	38%	

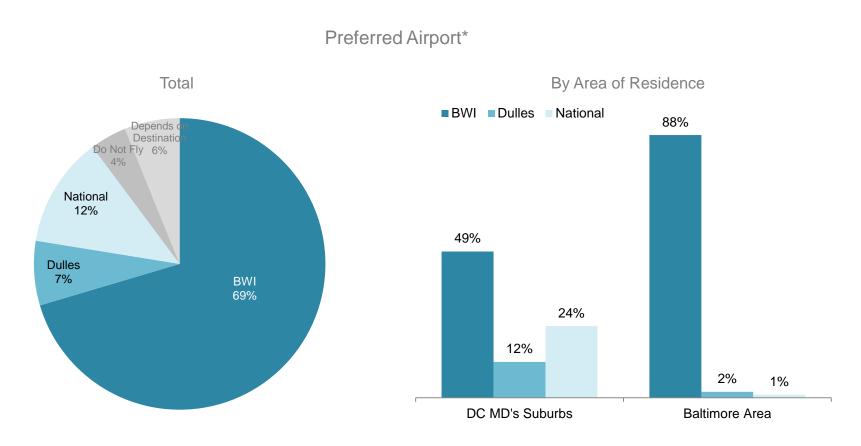
Base = Total Sample (n=554)





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

Airport preference from among the three area airports is highest for BWI Marshall, with Reagan National being distant second choice.



Base= Total Sample (n=554)

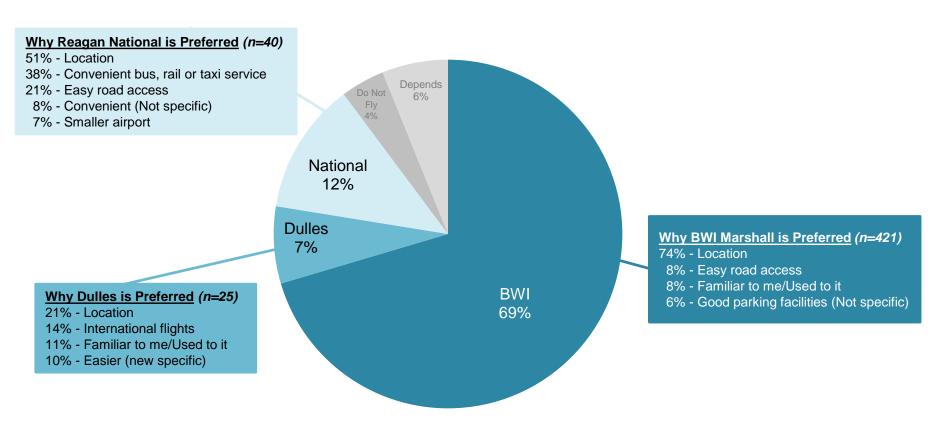


^{*} The chart corresponding to this question from the infographic that accompanies this report is calculated using a base that excludes those respondents who do not fly and those answering "Don't know" or refusing to answer.



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

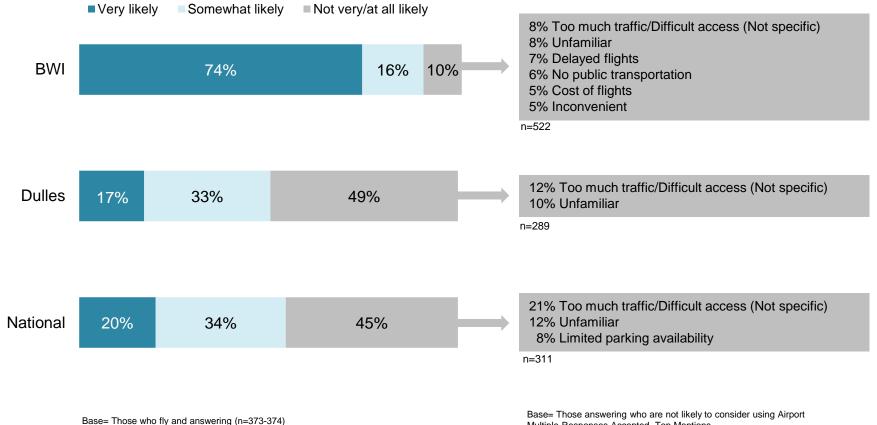




Q: How likely are you to consider using each area airport in the future?

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

Maryland residents are most likely to consider using BWI Marshall in the future. Other than location, respondents most commonly mentioned traffic and difficult access to the airports, along with lack of familiarity, as deterrents to considering using each of the three airports.



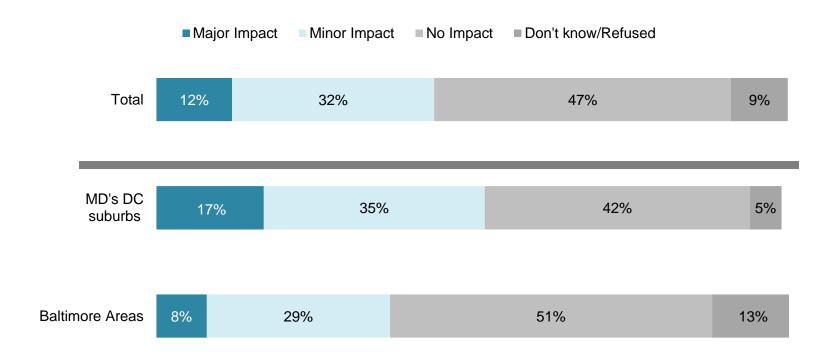


Multiple Responses Accepted, Top Mentions



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

One-half of residents of Maryland's Washington, DC suburbs (52%) say that the opening of the first phase of the Silver Line of Metro impacted their airport preference. The impact was much less among residents of the Baltimore area (37% impacted).



Base= Those who used any airport (n=330)







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Standard Error of the Data

A sample size of 554 will yield data that has a maximum fluctuation of ±4.2 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:

If the percentage found is around:	<u>50%</u>	40% or <u>60%</u>	30% or <u>70%</u>	20% or <u>80%</u>	10% or <u>90%</u>	1% or 99%
Then, the standard error in percentage points for a Total Sample of n = 554 is:	±4.2	±4.1	±3.8	±3.3	±2.5	±0.8

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 16.7 and 23.3% ($20\% \pm 3.3$ percentage points).

