Transportation in the Baltimore Area
Summer 2016 Baltimore MarkeTrak®

Prepared by:

wbaRESEARCH

Summer 2016

Public Transportation *pages 4-9*

- Six in ten (59%) Baltimore area residents have either used public transportation in the past month (37%) or are likely to consider doing so in the future (22%). pages 4-6

- Satisfaction with the region's transportation system shows room for improvement. Only 20% of area residents are satisfied (rated 8-10 on a 0-10 scale), while 55% gave more neutral ratings of 4-7. page 7

- Support for increased government funding of public transportation is high—74% of Baltimore area residents say they would be very or somewhat likely to support an increase. Support is most pronounced among Baltimore City residents (46% *very likely* to support vs. 18%-33% 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 (39% vs. 24%), two-thirds of non-users (66%) would at least be somewhat likely to support an increase. page 8

- Maintaining existing roads and bridges (85% rated 8-10), as well as reducing traffic congestion by improving public transportation (71% rated 8-10), are rated as the most important types of projects in which the region could invest. page 9

App-Based Transportation *pages 11-18*

- Among residents of the Baltimore 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 (85% familiar with Uber, 38% familiar with Lyft). page 11

- While just over one-third of all of the Baltimore region's residents have ever used Uber or Lyft, two-thirds of those between 18 and 34 years old report doing so. About one in six area residents have used an app-based transportation company to get to or from public transit (15%) or to or from one of the region's three airports (14%). page 14

- Baltimore City and Anne Arundel County residents are more likely than their other suburban counterparts to have taken any trips using an app-based transportation company in the past month (32%-37% vs. 24%-26%). page 15

- Leisure purposes (bars, restaurants, shopping, sports events, etc.) are most frequently cited as the purpose of app-based transportation users most recent trip (68%), followed by trips for work or school (21%). page 16

- Taxi is most often the back up when app-based transportation is not available (38%). Other common options are to drive themselves (24%) or turn to public transportation (12%). Page 17
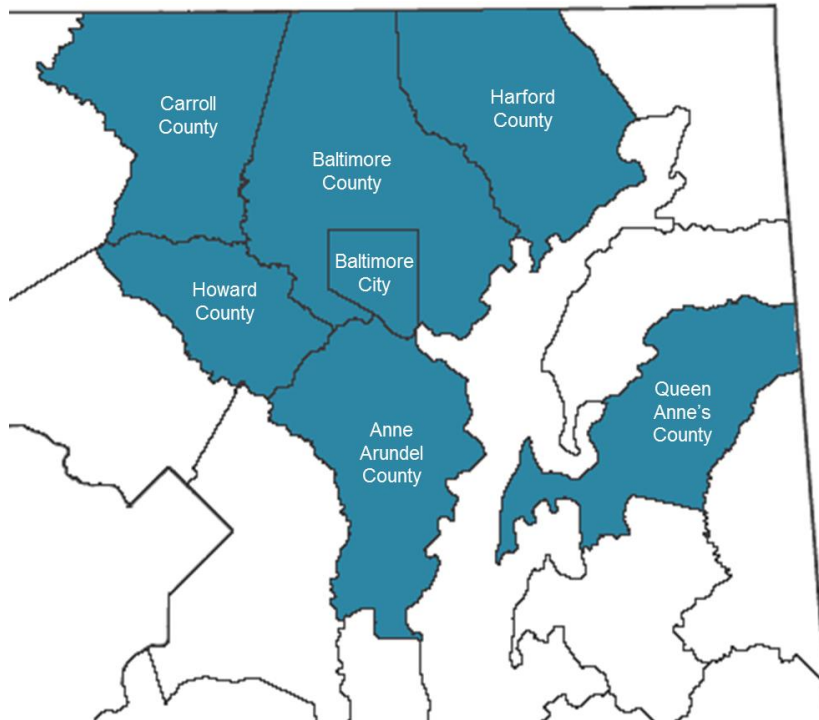
Airports *pages 20-25*

- Six in ten area residents (62%) have taken a trip from BWI Marshall (61%), Dulles (16%) or Reagan National (13%) airports in the past 12 months. In fact, four in ten Baltimore area residents (40%) have only flown out of BWI Marshall in the past 12 months. page 20-21

- Airport preference is strongest for BWI (88%). As such, the vast majority of Baltimore area residents (83%) 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 21-24
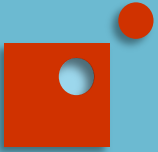
MarkeTrak® is a quarterly omnibus public opinion survey conducted by WBA Research.

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 Baltimore MarkeTrak® study was conducted in the Baltimore, Maryland metropolitan area through a random telephone survey of 200 adult heads of household and 200 online respondents.
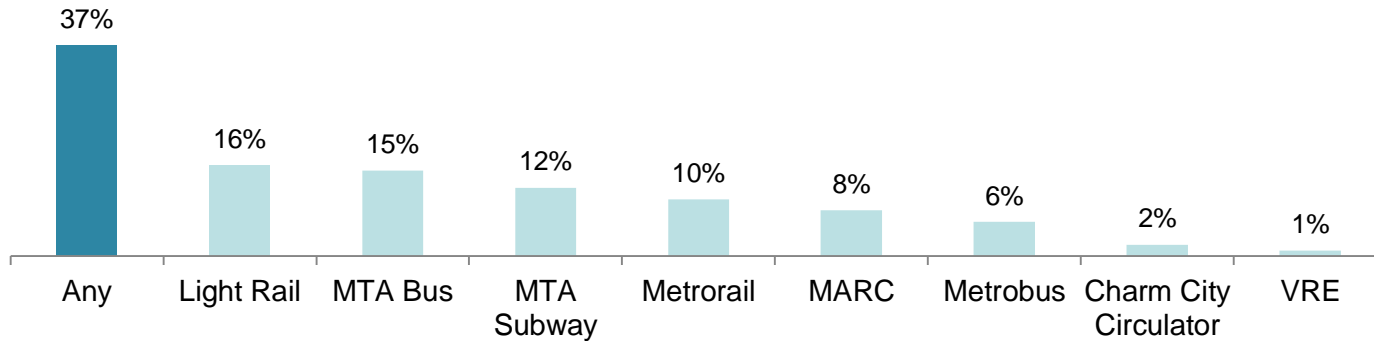

WBA Research is a full-service market research firm located in Crofton, MD. The company was founded in 1987 with a focus on providing high quality custom research and responsive client service. WBA conducts qualitative (focus groups, in-depth interviews, etc.) and quantitative (mail, telephone, online,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

Public Transportation

Q: Which of the following public transportation services have you used in the past month?
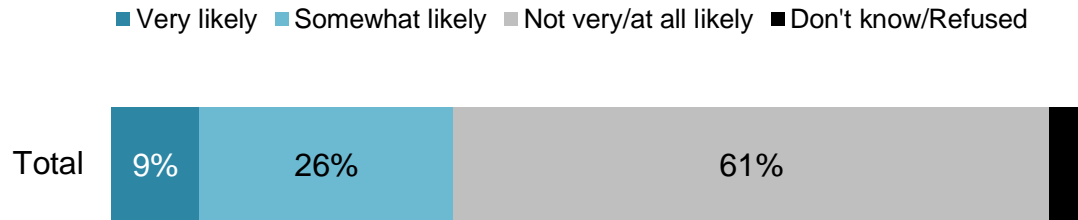
More than one-third of the Baltimore area residents surveyed have used any of the region's public transportation services in the past month, with an almost even distribution across Light Rail, MTA Bus and MTA Subway.

Any	Light Rail	MTA Bus	MTA Subway	Metrorail	MARC	Metrobus	Charm City Circulator	VRE
37%	16%	15%	12%	10%	8%	6%	2%	1%

Base= Total Sample (n=400)
Multiple Responses Accepted, Top Mentions

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

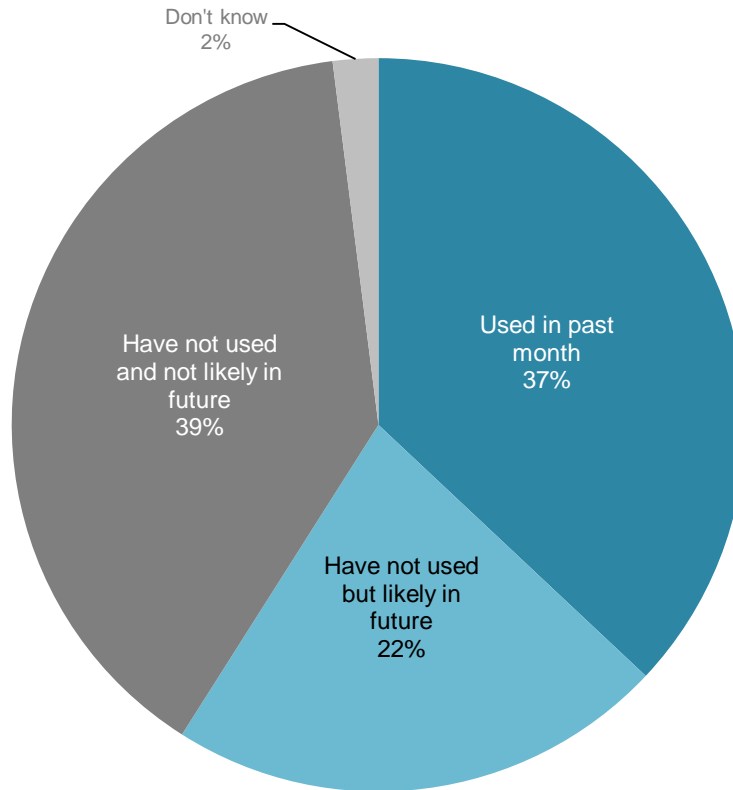More than one-third of those who have <u>not</u> used public transportation in the past month (35%) say they are likely to consider doing so in the future.

■ Very likely ■ Somewhat likely ■ Not very/at all likely ■ Don't know/Refused

Total	9%	26%	61%	

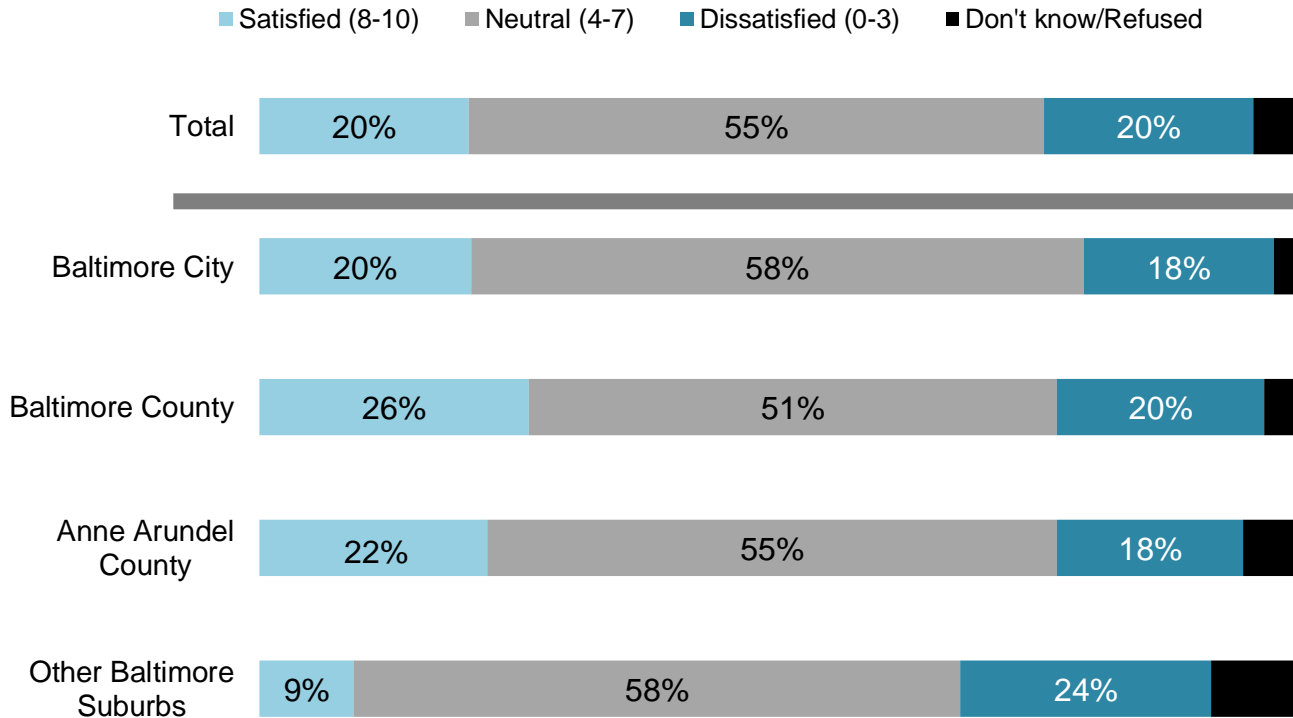Base= Those who have not used public transportation in the past month (n=274)

Among all Baltimore area residents, six in ten (59%) have either used public transportation in the past month (37%) or are likely to consider using it in the future (22%).

Base= Total Sample (n=400)

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

Only two in ten Baltimore 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.

Legend: ■ Satisfied (8-10)   ■ Neutral (4-7)   ■ Dissatisfied (0-3)   ■ Don't know/Refused

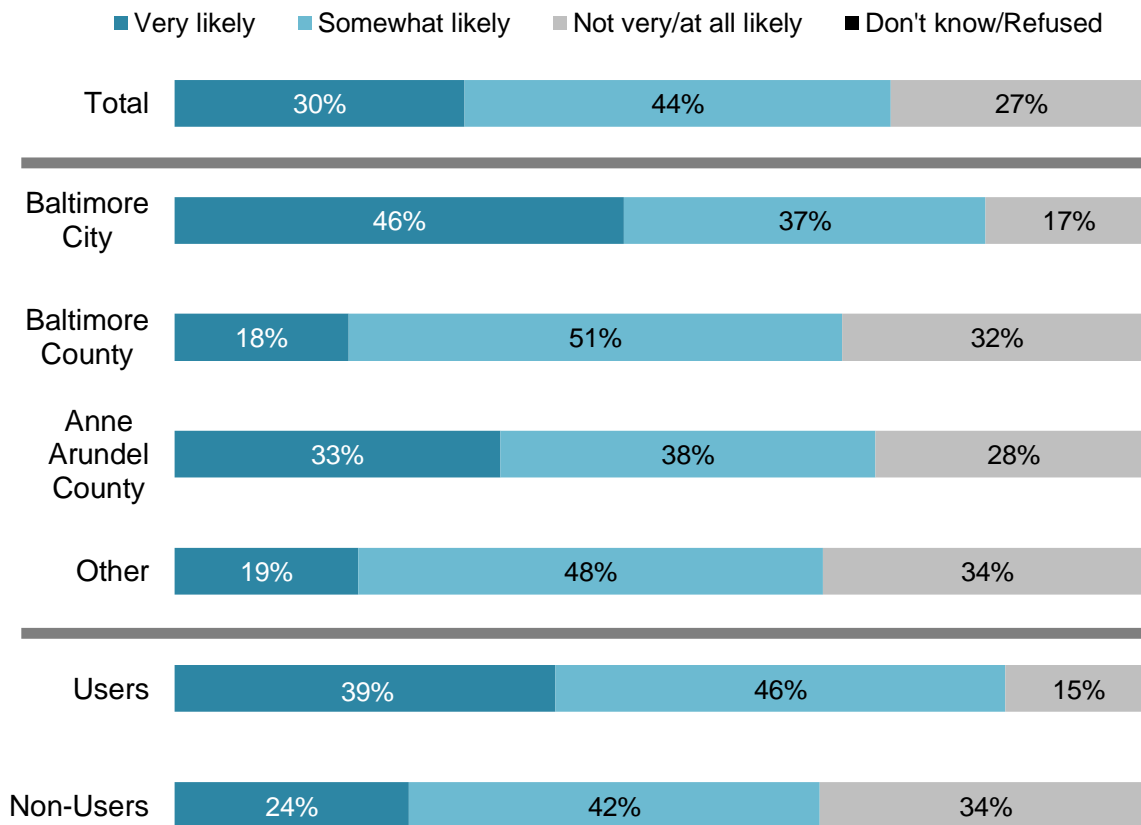|	Satisfied (8-10)	Neutral (4-7)	Dissatisfied (0-3)
Total	20%	55%	20%
Baltimore City	20%	58%	18%
Baltimore County	26%	51%	20%
Anne Arundel County	22%	55%	18%
Other Baltimore Suburbs	9%	58%	24%

Base= Total Sample (n=400)

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

Overall, about three-fourths (74%) of Baltimore area residents would be very or somewhat likely to support increased government funding for public transportation.

In fact, more than eight in ten Baltimore City (83%) residents say they would be *very* or *somewhat likely* to support such funding. Most Anne Arundel County residents (71%) also say they would be *very* or *somewhat 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, two-third of non-users would be at least somewhat likely to support an increase.

Legend: ■ Very likely ■ Somewhat likely ■ Not very/at all likely ■ Don't know/Refused

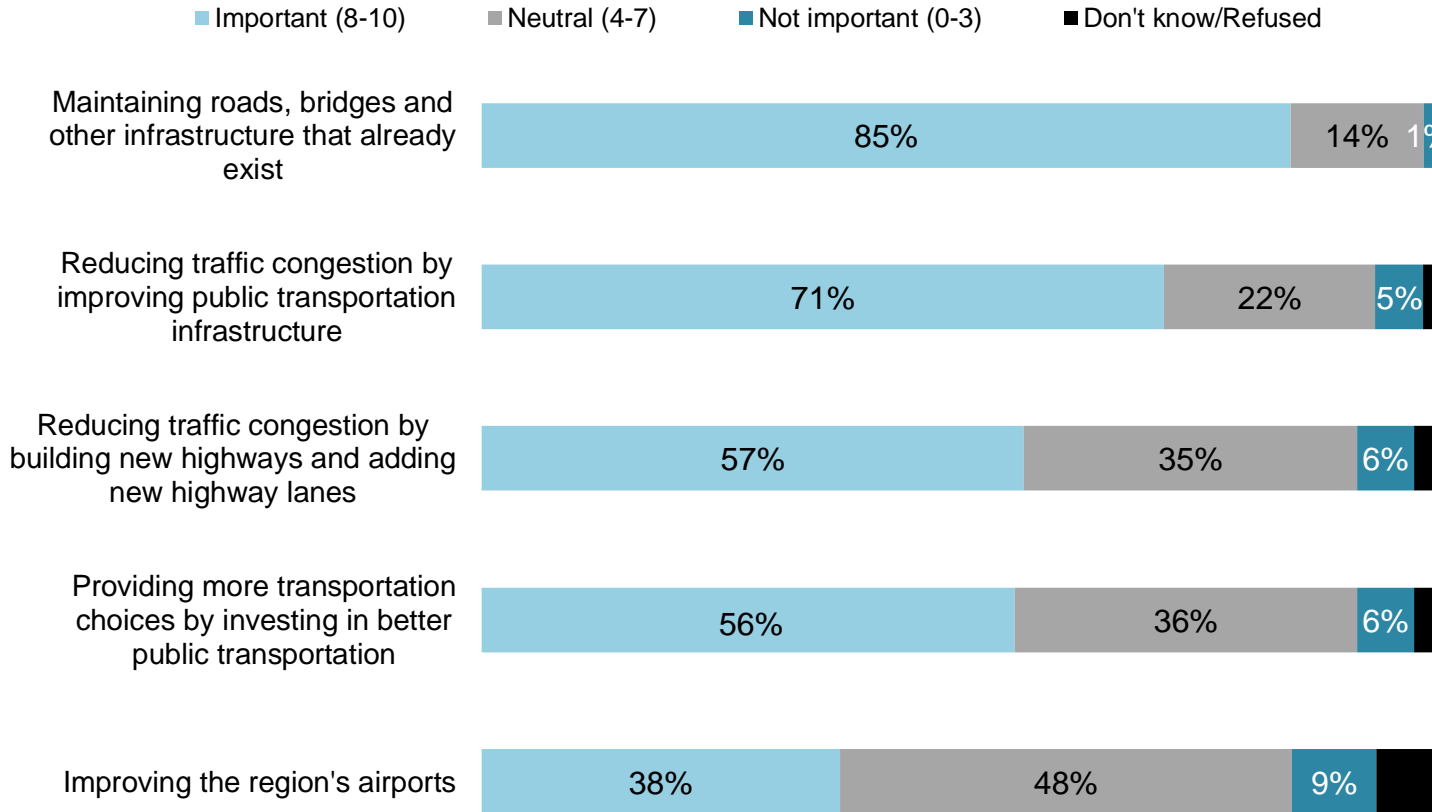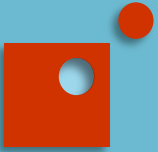| Group	Very likely	Somewhat likely	Not very/at all likely
Total	30%	44%	27%
Baltimore City	46%	37%	17%
Baltimore County	18%	51%	32%
Anne Arundel County	33%	38%	28%
Other	19%	48%	34%
Users	39%	46%	15%
Non-Users	24%	42%	34%

Base= Total Sample (n=400)
* The infographic data that accompanies this report is calculated using a base that excludes those respondents answering "Don't know" or refusing to answer.

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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.
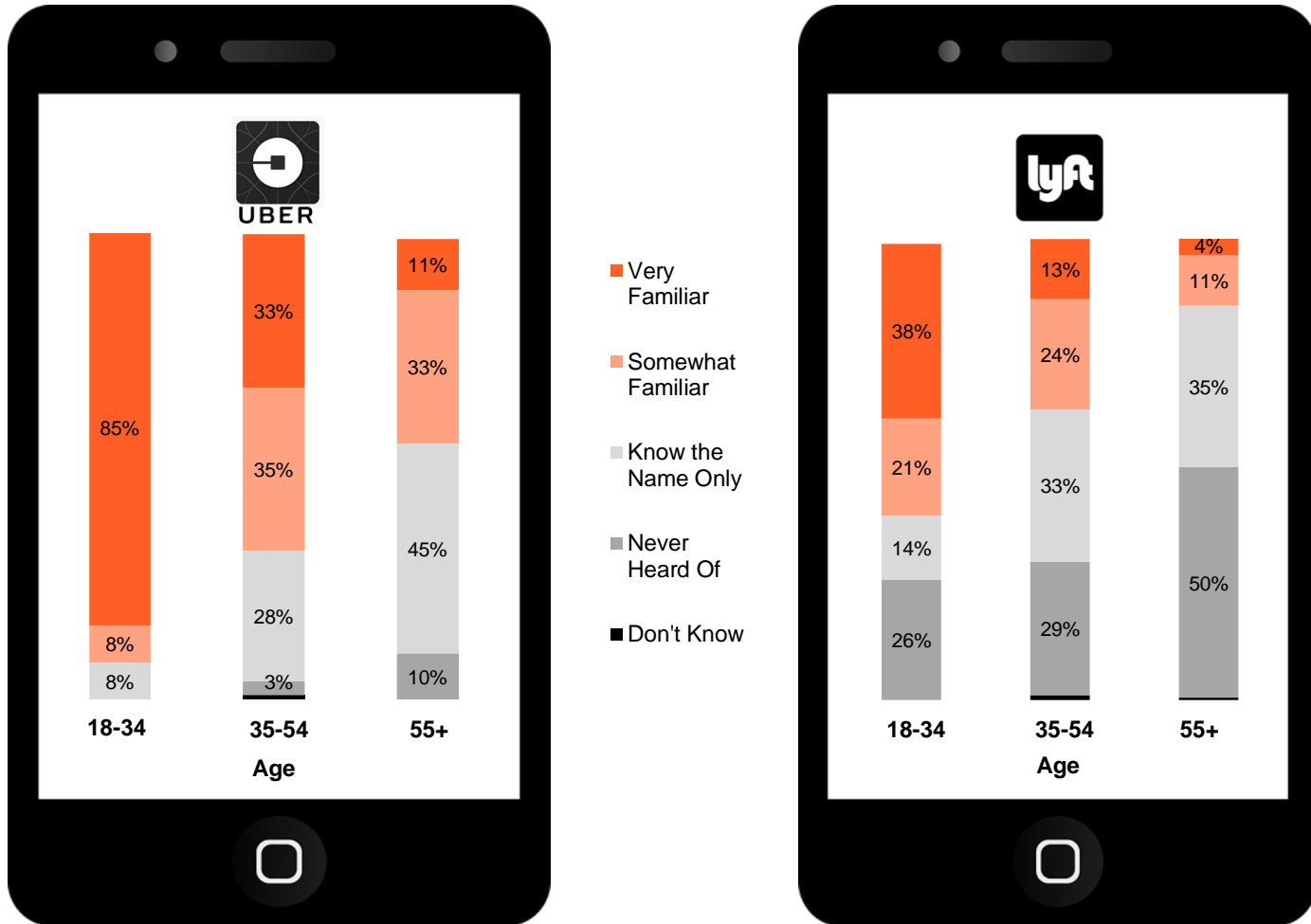
■ Important (8-10)   ■ Neutral (4-7)   ■ Not important (0-3)   ■ Don't know/Refused

Category	Important (8-10)	Neutral (4-7)	Not important (0-3)
Maintaining roads, bridges and other infrastructure that already exist	85%	14%	1%
Reducing traffic congestion by improving public transportation infrastructure	71%	22%	5%
Reducing traffic congestion by building new highways and adding new highway lanes	57%	35%	6%
Providing more transportation choices by investing in better public transportation	56%	36%	6%
Improving the region's airports	38%	48%	9%

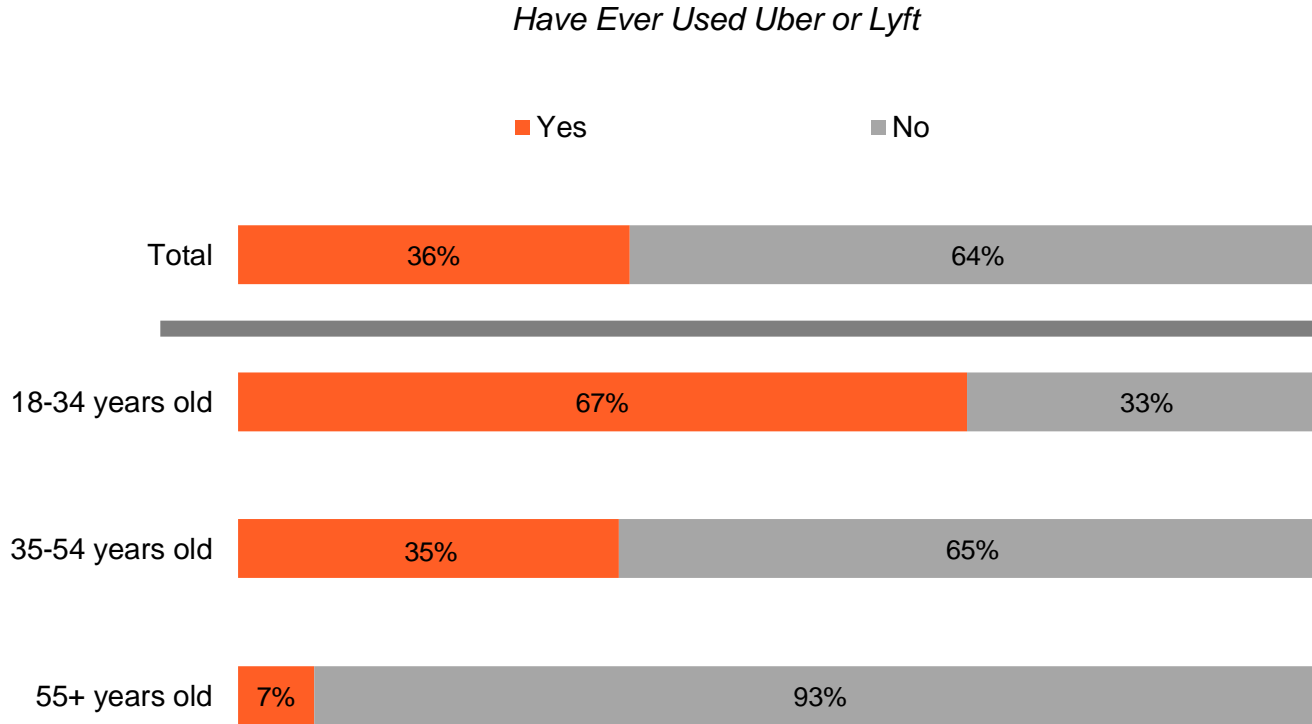Base= Total Sample (n=400)

App-Based Transportation

Residents of the Baltimore 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.

Legend:
- Very Familiar
- Somewhat Familiar
- Know the Name Only
- Never Heard Of
- Don't Know

UBER

Age	Very Familiar	Somewhat Familiar	Know the Name Only	Never Heard Of
18-34	85%	8%	8%	
35-54	33%	35%	28%	3%
55+	11%	33%	45%	10%

lyft

Age	Very Familiar	Somewhat Familiar	Know the Name Only	Never Heard Of	Don't Know
18-34	38%	21%	14%	26%	
35-54	13%	24%	33%	29%	
55+	4%	11%	35%	50%	

Base= Total Sample (n=400)

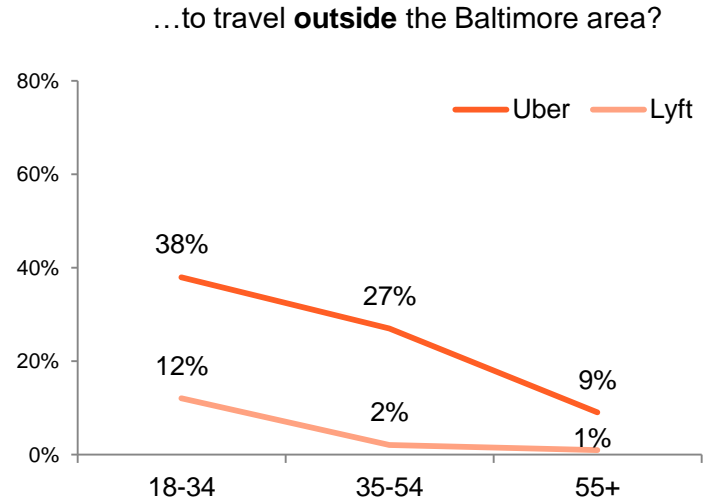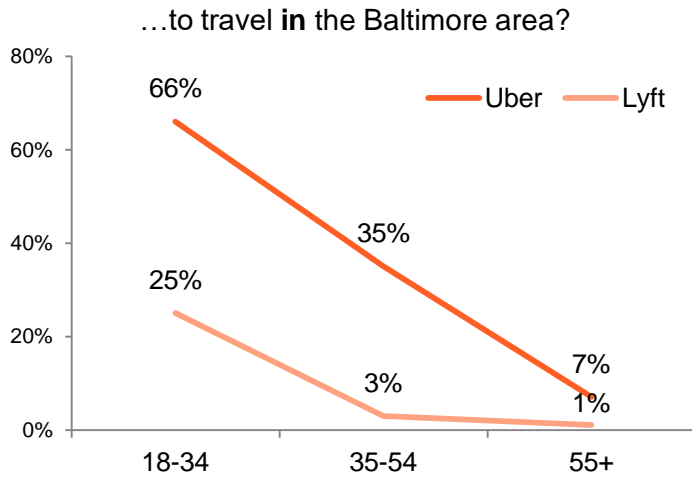# Q: Which app-based transportation companies have you ever used in the Baltimore area?

Nearly four in ten residents of the Baltimore 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.

Have Ever Used Uber or Lyft

■ Yes   ■ No

	Yes	No
Total	36%	64%
18-34 years old	67%	33%
35-54 years old	35%	65%
55+ years old	7%	93%

Base= Total Sample (n=400)

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

Regardless of whether their travel is inside or outside the Baltimore area, younger residents are fueling the rise of app-based transportation.
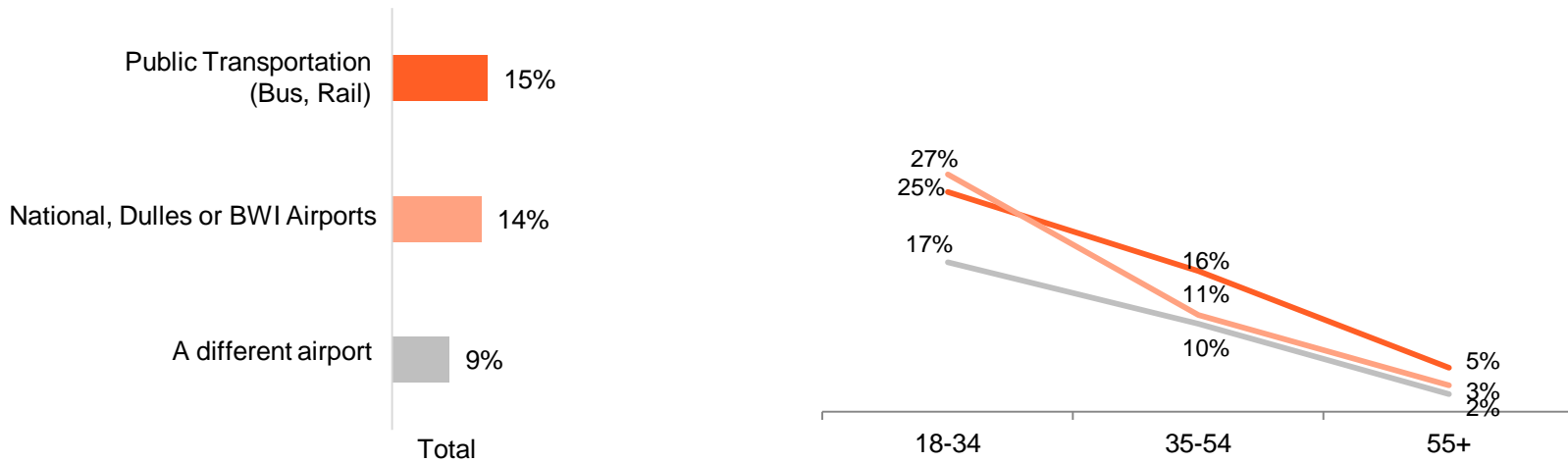
…to travel **in** the Baltimore area?

Uber   Lyft

- 66%
- 25%
- 35%
- 3%
- 7%
- 1%

18-34   35-54   55+

…to travel **outside** the Baltimore area?

Uber   Lyft

- 38%
- 12%
- 27%
- 2%
- 9%
- 1%

18-34   35-54   55+

Base= Total Sample (n=400)

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

Across the region, about one in six residents have used an app-based transportation company to get to or from public transit or to or from National, Dulles or BWI Marshall Airports. About one in ten (9%) 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.
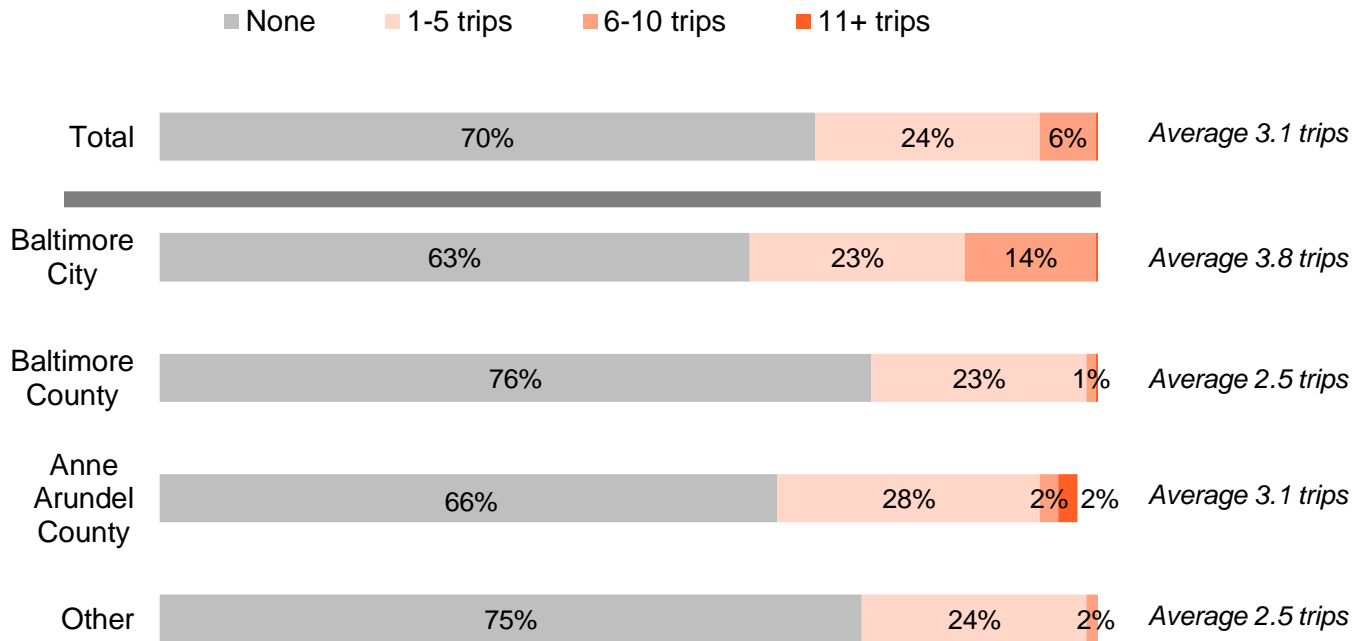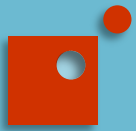

Base= Total Sample (n=400)

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

Residents of the Baltimore City and Anne Arundel County are more likely than their suburban counterparts to have taken any trips using an app-based transportation company in the past month (32%-37% vs. 24%-26%).

Baltimore area residents who have taken trips using an app-based transportation company average just over three one-way trips per month.
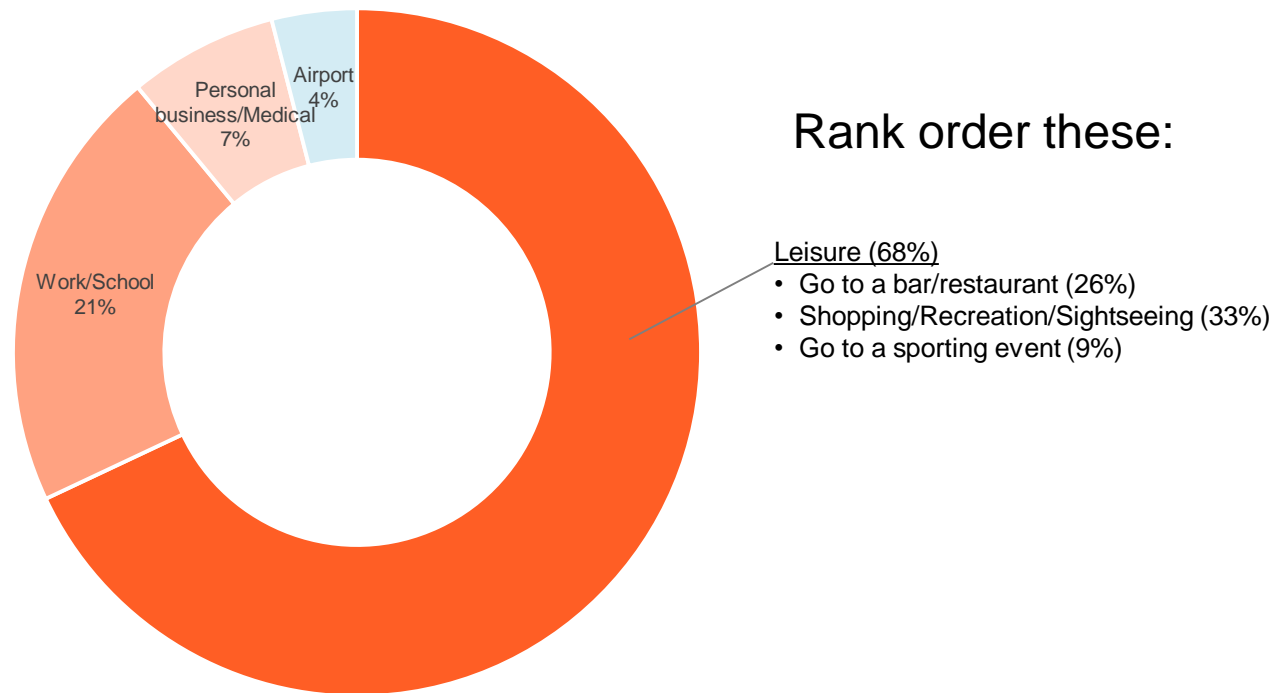

■ None   ■ 1-5 trips   ■ 6-10 trips   ■ 11+ trips

	None	1-5 trips	6-10 trips	11+ trips	Average
Total	70%	24%		6%	*Average 3.1 trips*
Baltimore City	63%	23%		14%	*Average 3.8 trips*
Baltimore County	76%	23%		1%	*Average 2.5 trips*
Anne Arundel County	66%	28%	2%	2%	*Average 3.1 trips*
Other	75%	24%		2%	*Average 2.5 trips*

Base= Total Sample (n=400)
Average based among those who have used an app-based transportation company (n=161)
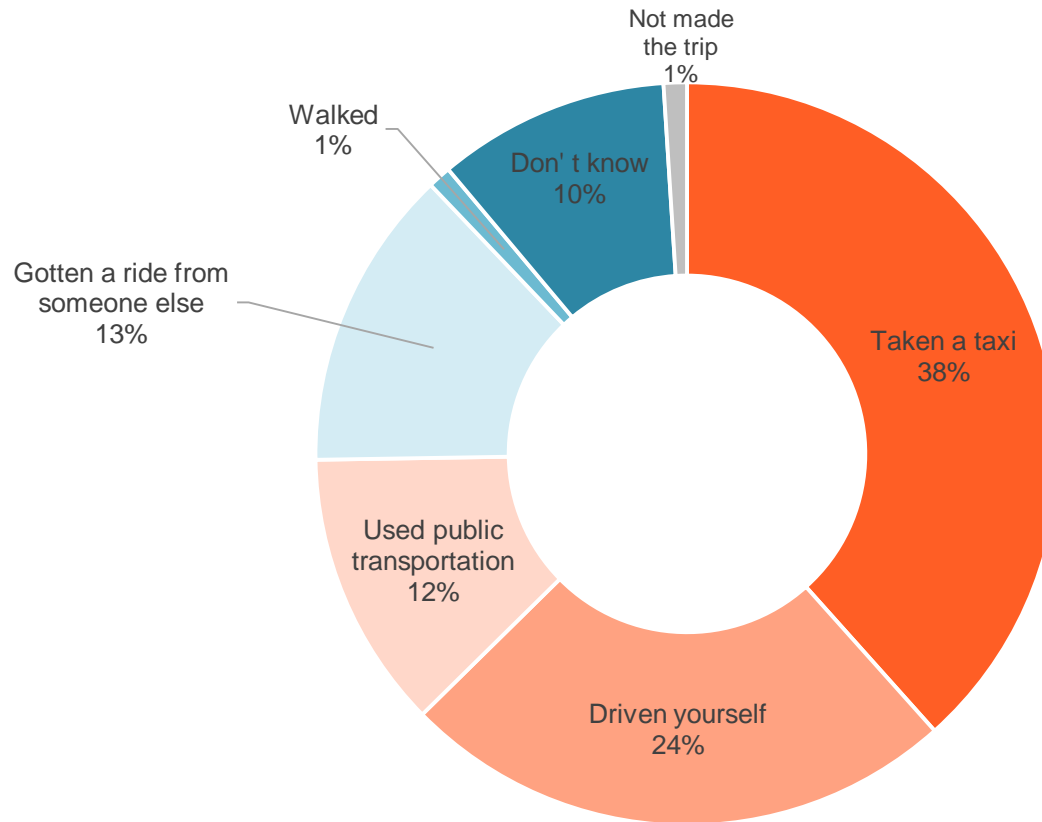
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Those who have used app-based transportation in the past three months most often said their last such trip was for leisure purposes (68%), while about one in five took their last trip to or from work, school, or for some other business related purpose.

Personal business/Medical 7%

Airport 4%

Work/School 21%

Rank order these:

Leisure (68%)
- Go to a bar/restaurant (26%)
- Shopping/Recreation/Sightseeing (33%)
- Go to a sporting event (9%)

Base= Those who have used app-based transportation in the past three months (n=117)

Q: If an app-based transportation company were not available, how would you have made that trip?
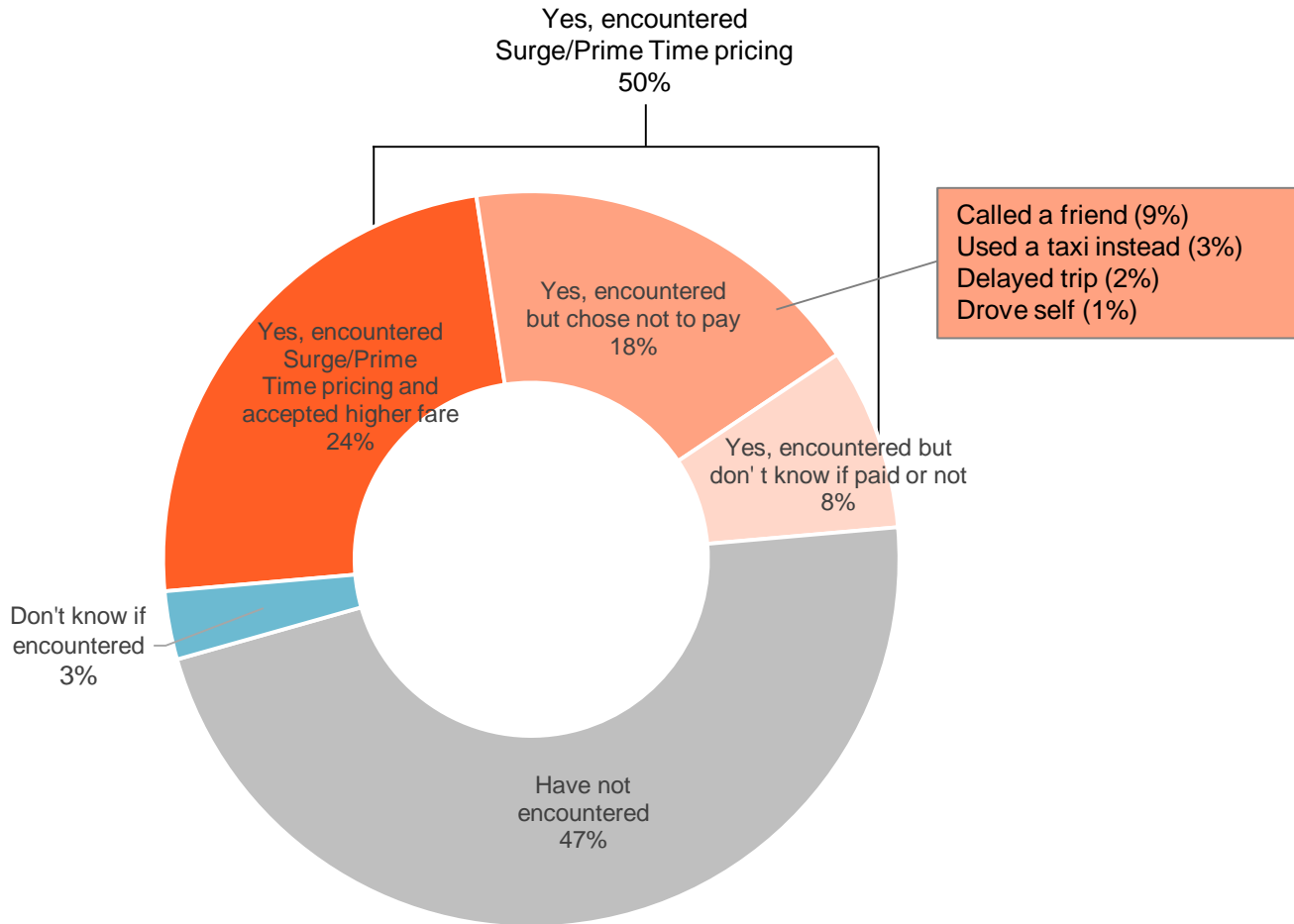
Those who have used app-based transportation in the past three months most often said they would have taken a taxi if an app-based transportation company had not been available for their last trip.
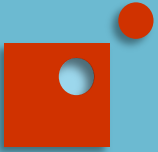

Base= Those who have used app-based transportation in the past three months (n=117)

About 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.

Yes, encountered
Surge/Prime Time pricing
50%

Yes, encountered
but chose not to pay
18%

Called a friend (9%)
Used a taxi instead (3%)
Delayed trip (2%)
Drove self (1%)

Yes, encountered
Surge/Prime
Time pricing and
accepted higher fare
24%

Yes, encountered but
don' t know if paid or not
8%

Don't know if
encountered
3%

Have not
encountered
47%

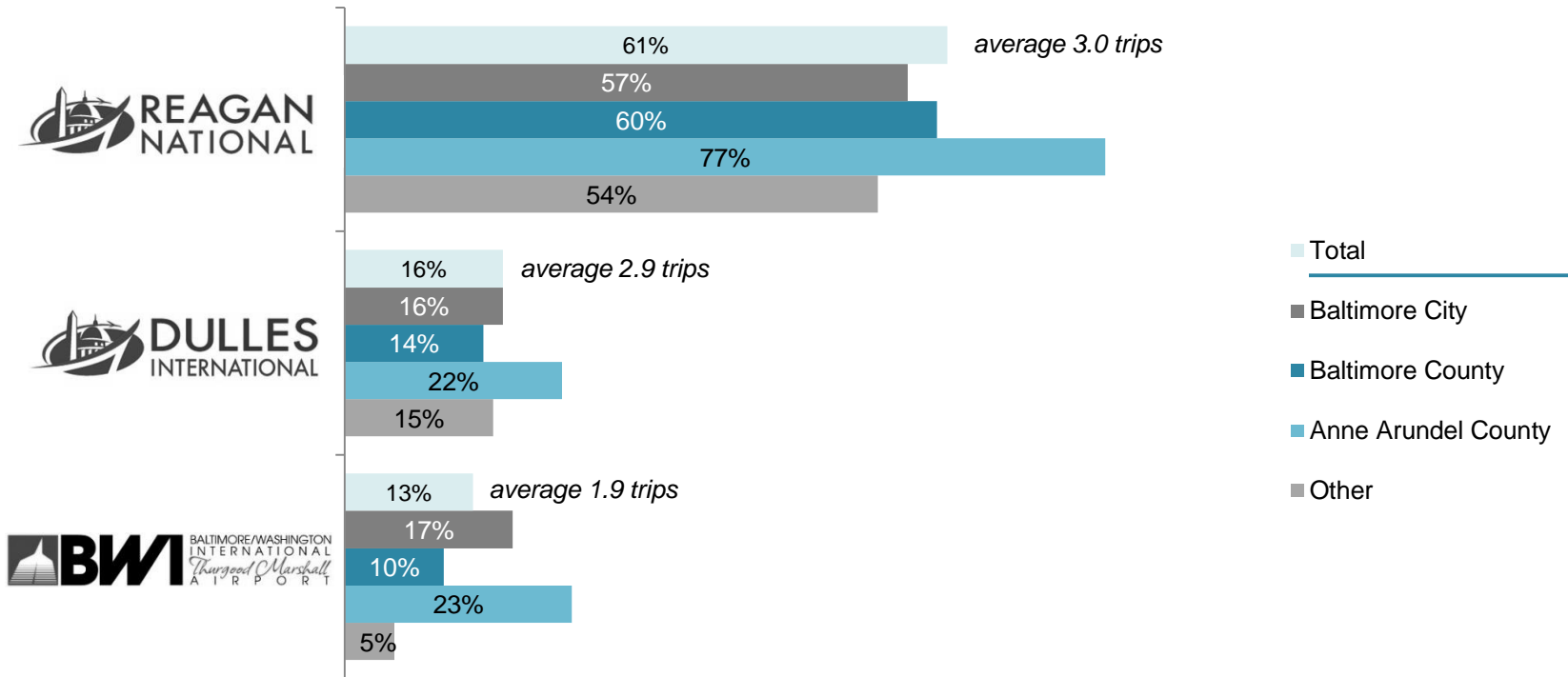Base= Those who have used Uber or Lyft (n=117)

Airports

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

While BWI Airport is the most frequently used airport by Baltimore area residents, more than one in ten have used either National or Dulles in the past 12 months.

% Who Have Taken ANY Trips From Each Airport:

REAGAN NATIONAL
- 61% *average 3.0 trips*
- 57%
- 60%
- 77%
- 54%

DULLES INTERNATIONAL
- 16% *average 2.9 trips*
- 16%
- 14%
- 22%
- 15%

BWI BALTIMORE/WASHINGTON INTERNATIONAL Thurgood Marshall AIRPORT
- 13% *average 1.9 trips*
- 17%
- 10%
- 23%
- 5%

Legend:
- Total
- Baltimore City
- Baltimore County
- Anne Arundel County
- Other

Base=Total Sample (n= 400)
Average number of trips calculated among those who took any trips from that airport
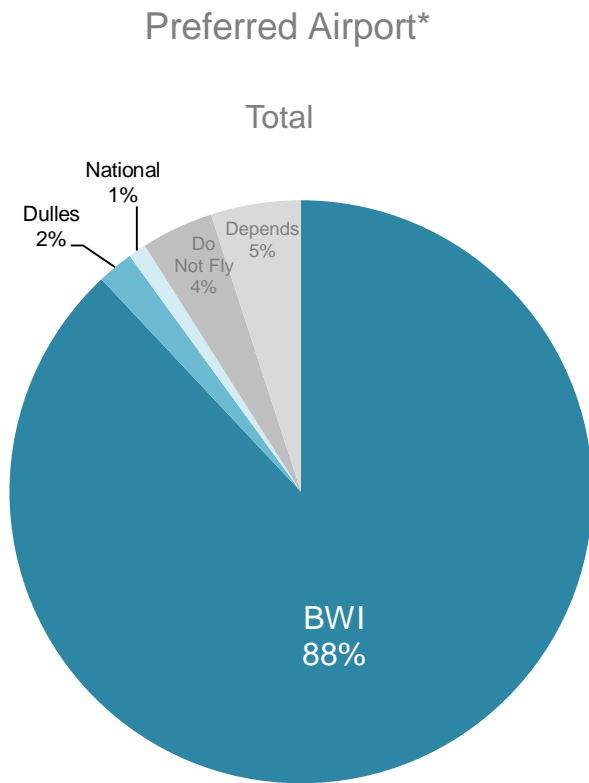(DCA n= 54, IAD n=65, BWI n=242)

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

	Total
Took any trips from BWI, National or Dulles	62%
Net: Used only one airport	41%
BWI only	40%
National only	0%
Dulles only	1%
Used multiple airports	20%
Used all three airports	8%
Took no trips	38%

Base = Total Sample (n= 400)

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?
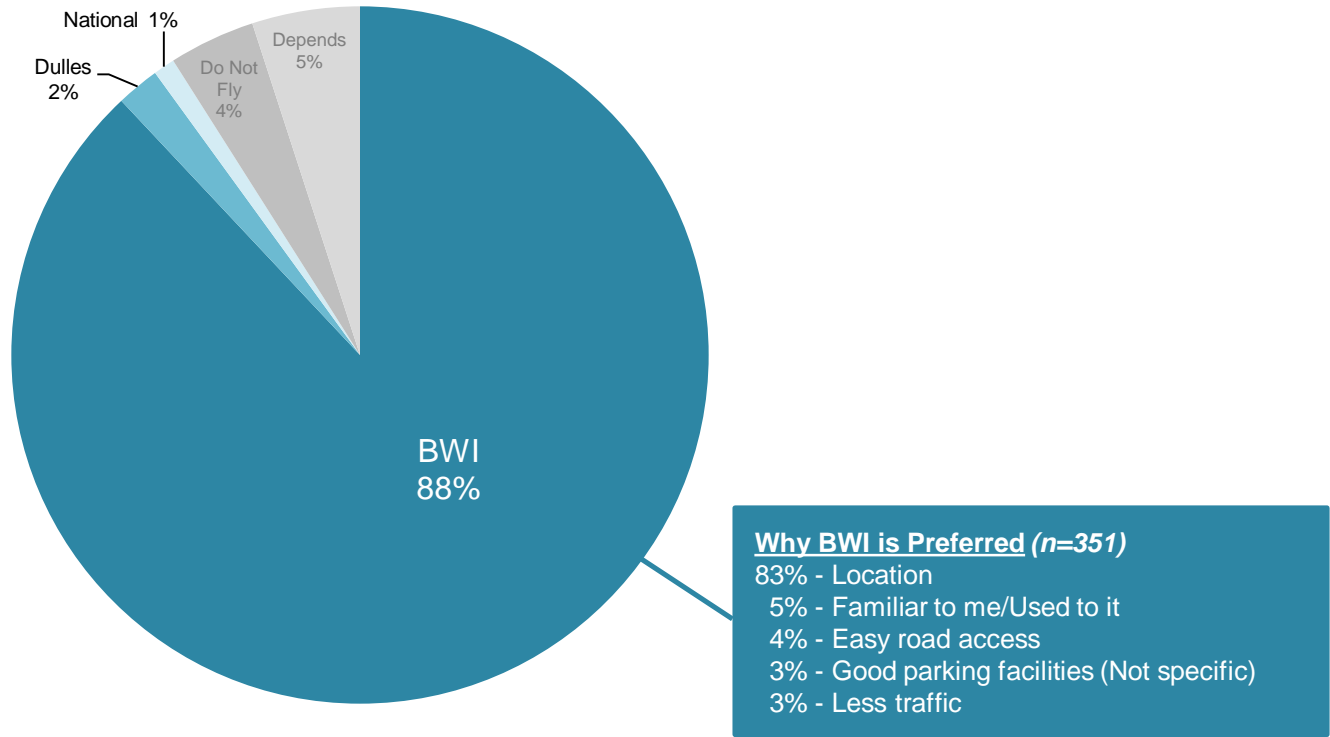
Airport preference is strongest for BWI Airport among Baltimore area residents.
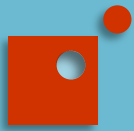
Preferred Airport*

Total

National
1%

Dulles
2%

Do Not Fly
4%

Depends
5%

BWI
88%

Base= Total Sample (n=400)

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Q: Why do you prefer to fly from _____?

After the primary influence of location, preference for BWI is driven by easy road access, good parking facilities and less traffic.

National 1%

Dulles
2%

Depends
5%

Do Not
Fly
4%

BWI
88%

Why BWI is Preferred *(n=351)*
83% - Location
  5% - Familiar to me/Used to it
  4% - Easy road access
  3% - Good parking facilities (Not specific)
  3% - Less traffic
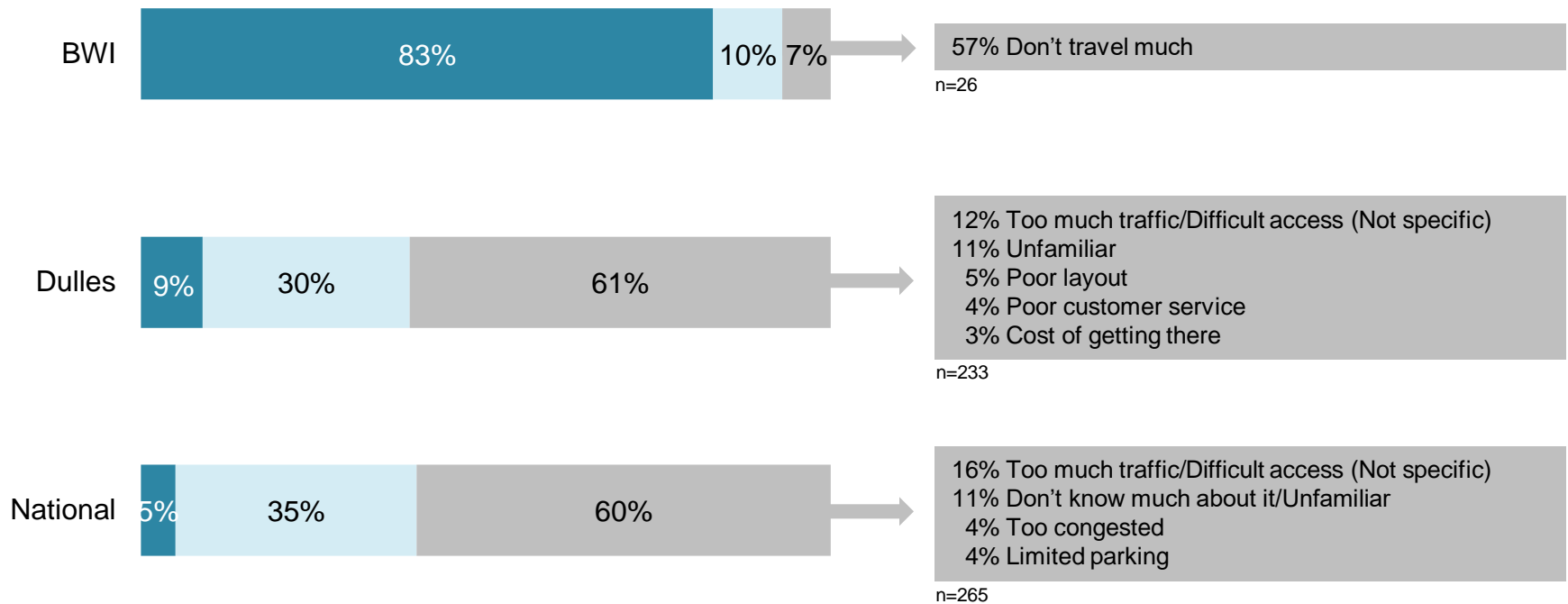
Multiple Responses Accepted, Top Mentions

Q: How likely are you to consider using each area airport in the future?
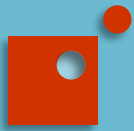**Q: Other than location, why are you not likely to consider using ___?**

The most common reason for Baltimore area residents not being likely to use BWI Airport is that they simply do not travel much.

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

BWI — 83% | 10% | 7%
→ 57% Don't travel much
n=26

Dulles — 9% | 30% | 61%
→ 12% Too much traffic/Difficult access (Not specific)
11% Unfamiliar
5% Poor layout
4% Poor customer service
3% Cost of getting there
n=233

National — 5% | 35% | 60%
→ 16% Too much traffic/Difficult access (Not specific)
11% Don't know much about it/Unfamiliar
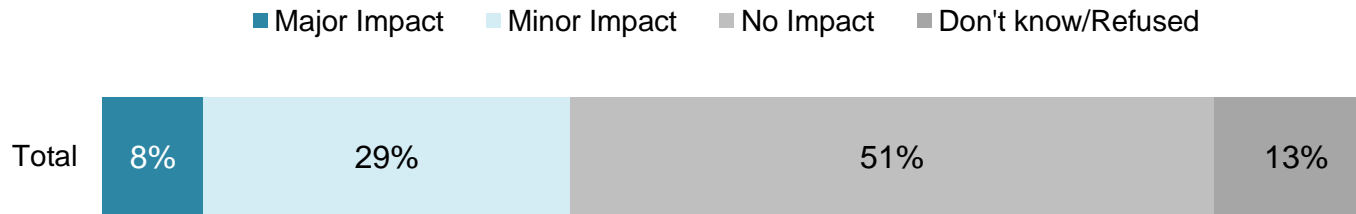4% Too congested
4% Limited parking
n=265

Base= Those who fly and answering (n=383-384)

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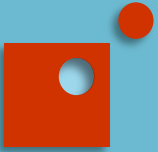Multiple Responses Accepted, Top Mentions

Across the Baltimore region, less than one in ten area residents say that the opening of the first phase of the Silver Line of Metro had a major impact on their airport preference.

■ Major Impact   ■ Minor Impact   ■ No Impact   ■ Don't know/Refused

Total	8%	29%	51%	13%

Base= Those who used any airport (n=247)

Appendix

Contact information

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Standard Error of the Data

A sample size of 400 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:

If the percentage found is around:	50%	40% or 60%	30% or 70%	20% or 80%	10% or 90%	1% or 99%
Then, the standard error in percentage points for a Total Sample of n = 400 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).