



*Long Range Transportation Plan
Marketing Research Study
Phase 2 - Additional Analysis of Data Set*

October 15, 2009

Prepared By



Assignment

- FAMPO recently contracted with Kimley-Horn and The Southeastern Institute of Research (SIR) for a random telephone survey assessing the attitudes and opinions of 1,500 residents regarding their satisfaction with the region's existing transportation system, the Long Range Transportation Plan (LRTP), and possible long term transportation-related improvements.
- While not the focus of the study, a few questions were included that probed respondents' opinions regarding the formation of a Transportation Authority and funding of transportation projects.
- This document reports data mining (in terms of demographics and psychographics) related to attitudes regarding the establishment of a Transportation Authority, increased transportation funding, and sources of transportation funding.

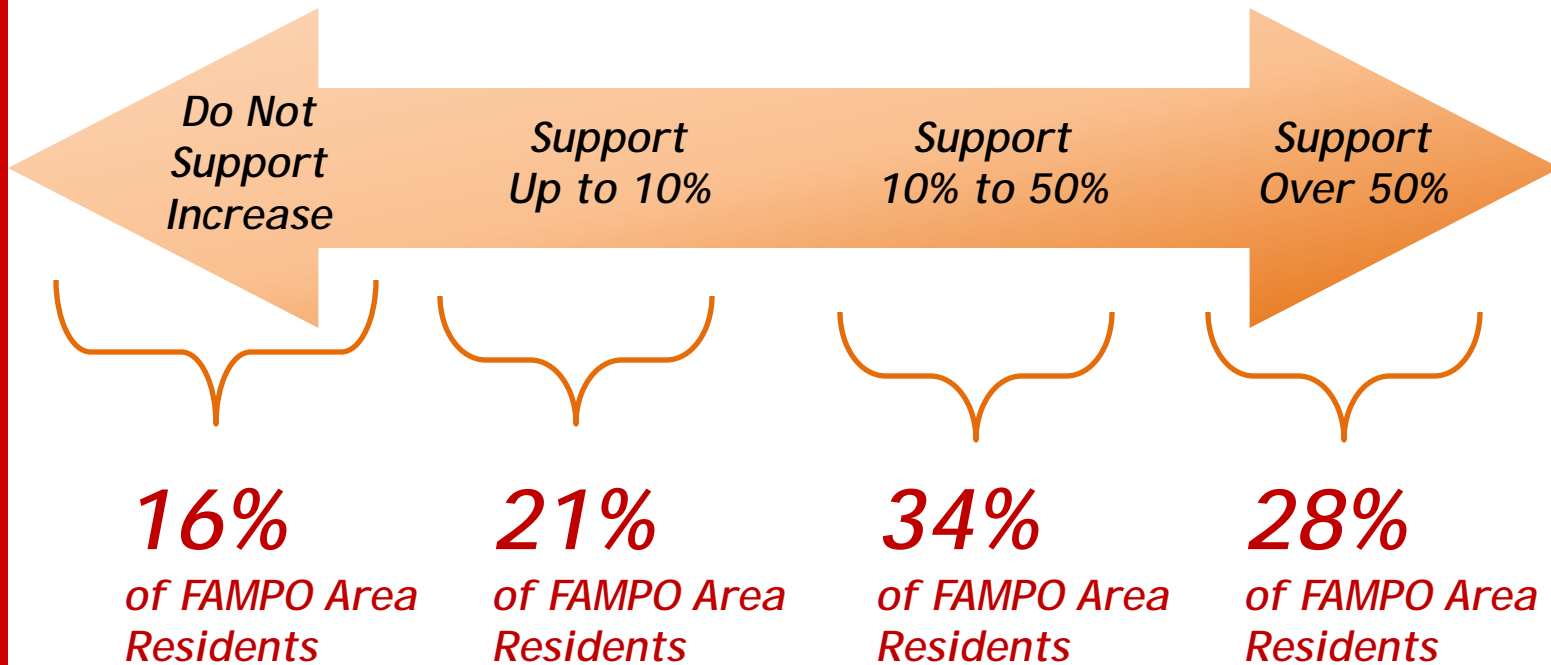
Table of Contents

- Increase In Transportation Funding - Continuum of Support
- Sources of Funding - Who Wants To Pay More Personally?
- Regional Transportation Authority - Supporters and Non-Supporters
- Impact of LRTP on Funding and Transportation Authority

Transportation Funding

*Who supports increases in funding?
Who doesn't?*

FAMPO's Continuum of Support for Increased Transportation Funding



Q14. Which of the following statements best describes your support in regard to transportation funding for the Greater Fredericksburg Region?



Those Who Support Increase In Transportation Funding . . .

Do Not Support Increase
Support Up to 10%
Support 10% to 50%
Support Over 50%

Age
48
44
41
44

Mean age

Tend to be slightly younger

Gender
48
53
44
50

% Male

Ethnicity
80
80
77
73

% White

Trans Needs
9
7
15
11

% HHs Needing Transportation Accommodations

Tend to be more in need of transportation accommodations

Residency
6
4
7
8

% New (<2 yrs)

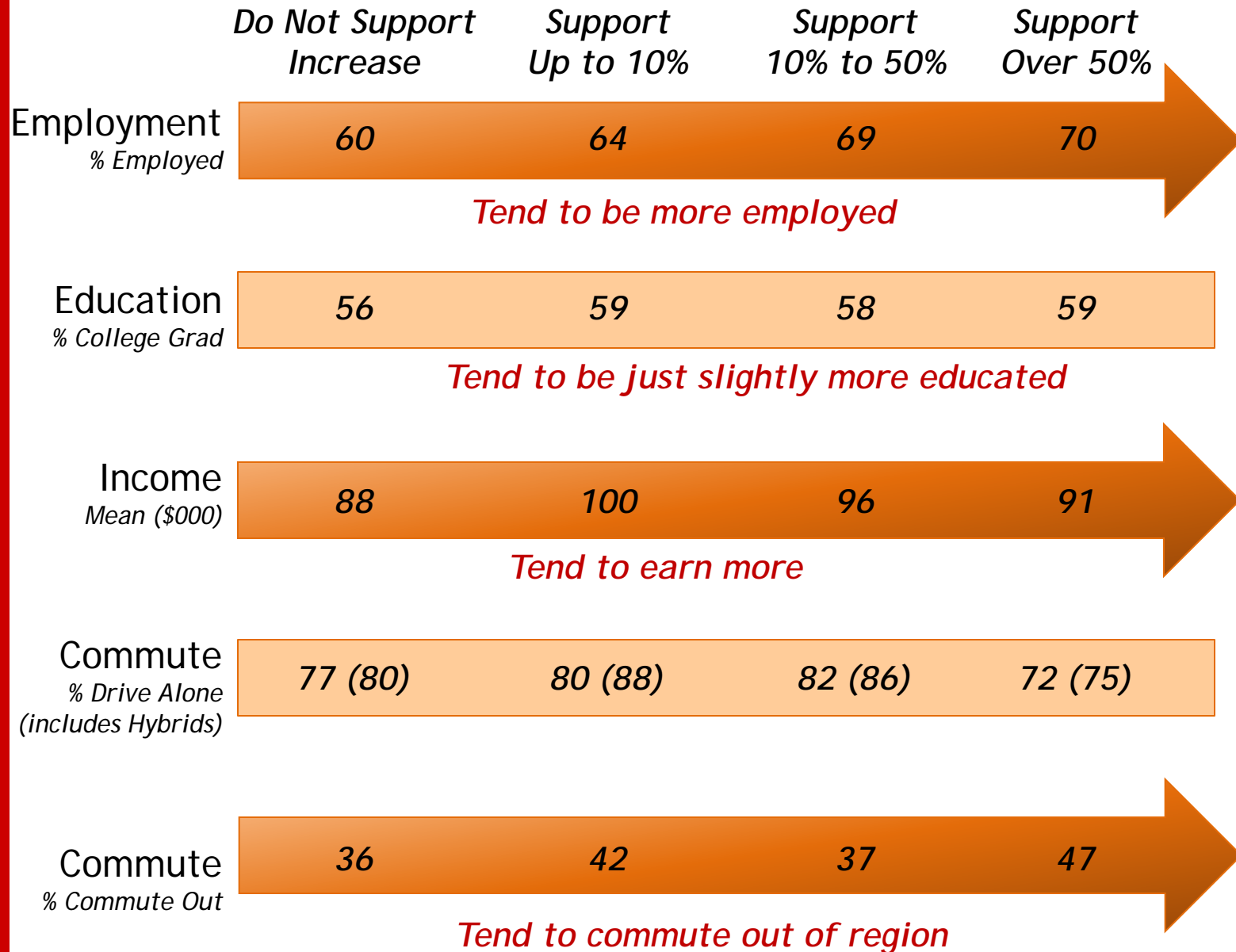
% Medium (2 -10)
35
46
45
49

% Long Term (10+)
59
50
48
43

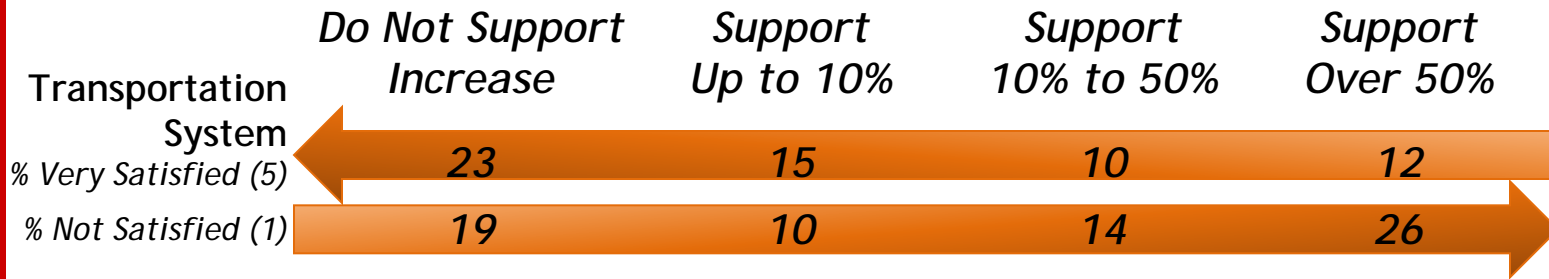
Tend to be relatively new to the area

Note: 5% of those who do not support an increase refused to answer the "age" question compared with 2% in each of the other categories.

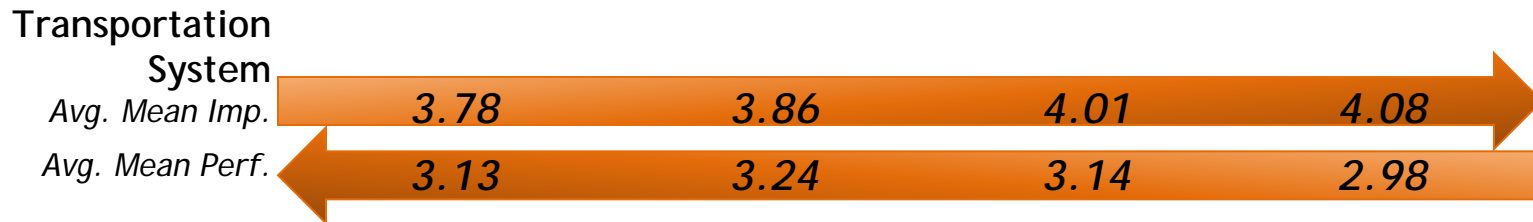
Those Who Support Increase In Transportation Funding . . .



Those Who Support Increase In Transportation Funding . . .



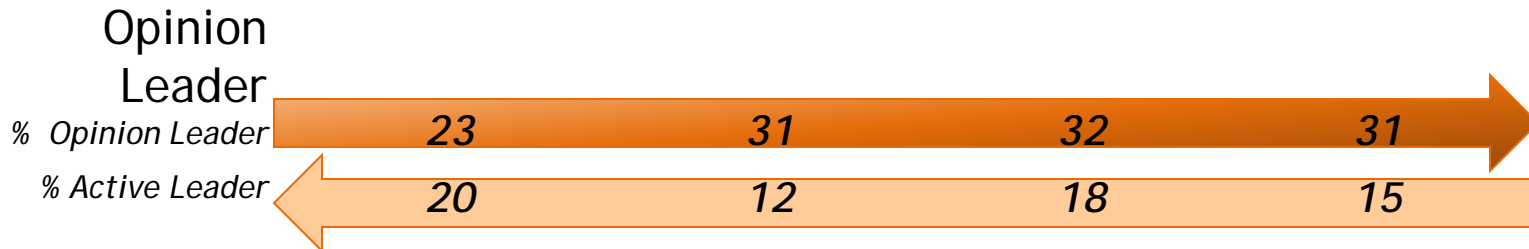
Tend to be more extreme in satisfaction



Tend to find transportation system attributes more important but less likely to give the area higher ratings



Tend to be more likely to volunteer for the panel



Tend to be Opinion Leaders

Opinion Leaders:
Defined as those who participated in at least 2 activities in the past year

Active Opinion Leaders:
Defined as those who participated in at least 3 selected activities in the past year (= about 1/3 of Opinion Leaders)

Those Who Support Increase In Transportation Funding . . .

Should Have Funding Responsibility	Do Not Support Increase	Support Up to 10%	Support 10% to 50%	Support Over 50%
% State	44	46	46	50
% Local	18	16	14	11
% Regional	7	11	10	7
% Federal	5	7	6	10

Are less likely to think local government should have transportation funding responsibility and more likely to think that the federal government should have responsibility. But the majority still think it's the state's responsibility.

Govt Spending on Trans.	Do Not Support Increase	Support Up to 10%	Support 10% to 50%	Support Over 50%
% Too Little (1, 2)	28	34	50	64
% Too Much (4, 5)	27	14	10	5

Tend to think the government spends too little on transportation

L RTP Spending \$ (out of \$100) to be spent on non road - Avg	Do Not Support Increase	Support Up to 10%	Support 10% to 50%	Support Over 50%
	59.30	64.40	70.50	66.90

Would allocate more L RTP funding to non-road related activities

Increase In Transportation Funding Recap - Demographics

Compared to Non-supporters, Supporters for an Increase in Transportation Funding Tend To Be Slightly Older, Slightly More Upscale, Opinion Leaders Who Are Relatively Newer To The Area

Supporters

(Tend To Be)

- Older
- Relatively newer to the area
- More likely to be employed
- Just slightly higher education
- Higher Income
- More likely to be an opinion leader

Non-Supporters

(Tend To Be)

- Younger
- Longer-term residents
- Less likely to be employed
- Just slightly lower education
- Lower Income
- Less likely to be an opinion leader

Increase In Transportation Funding Support Recap - Transportation Issues

Compared to Non-supporters, Supporters for an Increase in Transportation Funding Also Tend To Be Commuters Who Commute Out of The Area and People Who Have A Greater Need for Transportation Accommodations & Overall Transportation System.

Supporters

(Tend To Be)

- More likely to commute out of the area
- More extreme in satisfaction
- More in need of transportation accommodations
- Transportation attributes are more important but they rate area performance lower

Non-Supporters

(Tend To Be)

- Less likely to commute out of the area
- Less extreme in satisfaction
- Less in need of transportation accommodations
- Transportation attributes are less important but they rate area performance higher

Increase In Transportation Funding Support Recap - Funding Attitudes

Compared to Non-supporters, Supporters for an Increase in Transportation Funding Tend To Believe The State & Feds Should Have More Responsibility & LRTP Funds Should Go Towards A Balanced Transportation System

Supporters

(Tend To Think)

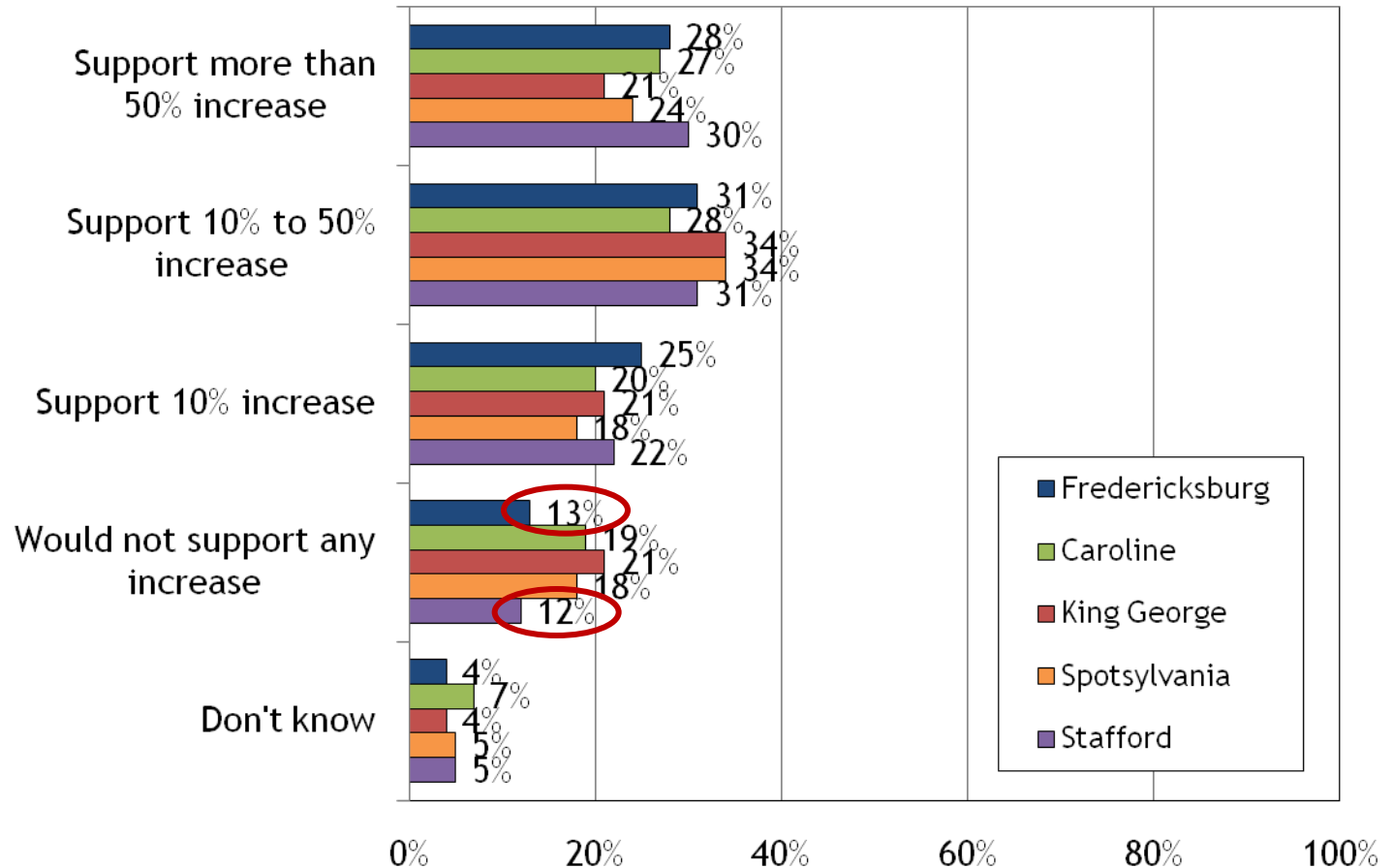
- The state should have primary transportation funding responsibility, but are more likely than non-supporters to think the federal government should have responsibility
- The government spends too little on transportation
- LRTP funding should be allocated to non-road related activities

Non-Supporters

(Tend To Think)

- The state should have primary transportation funding responsibility, but are more likely than supporters to think the local government should have responsibility
- The government spends too much on transportation
- LRTP funding should be allocated to non-road related activities, but less so than supporters

Fredericksburg and Stafford County Are The Least Likely to *Not* Support an Increase



Q14. Which of the following statements best describes your support in regard to transportation funding for the Greater Fredericksburg Region?

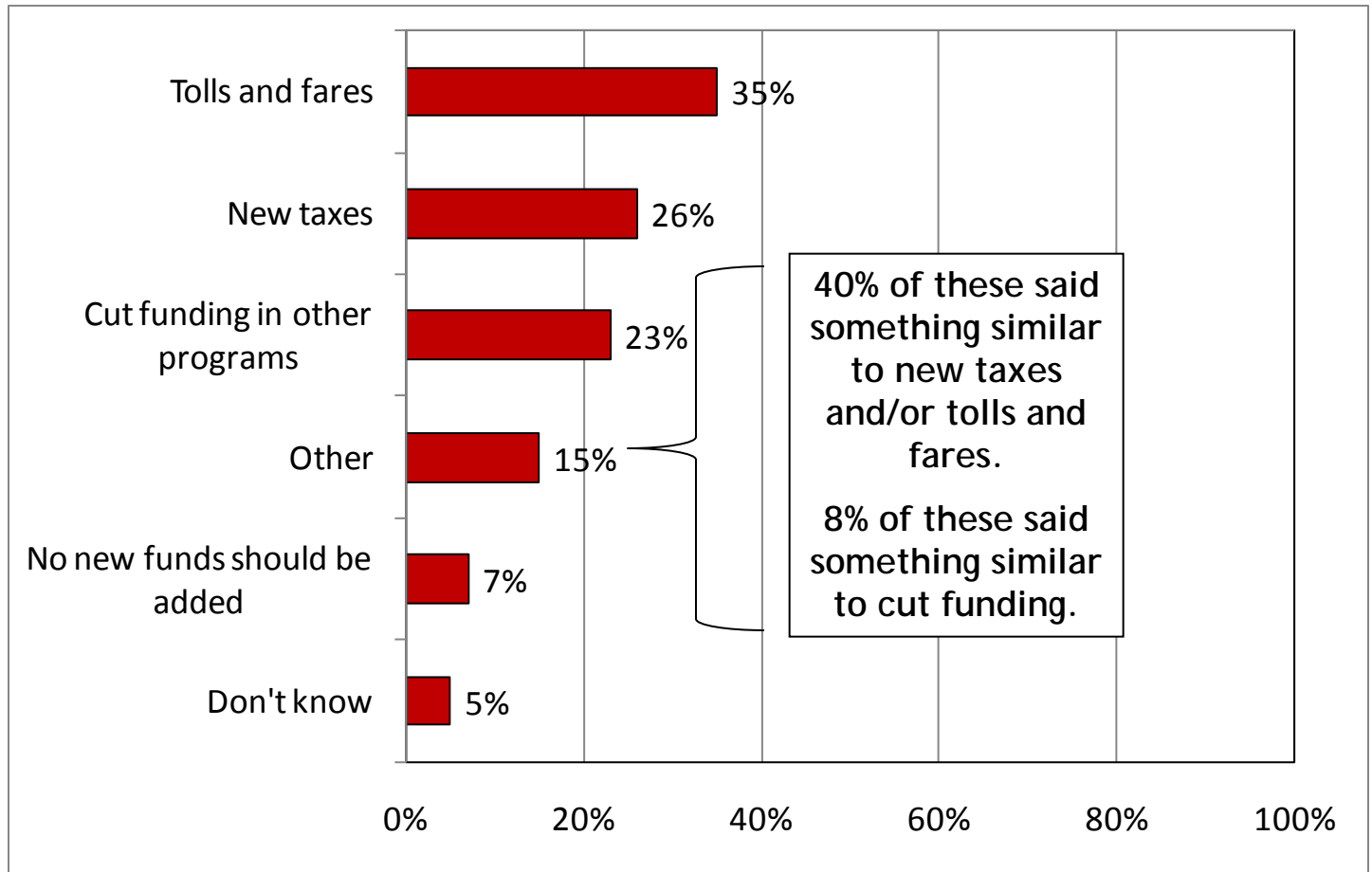


Sources of Transportation Funding

Who wants to pay more personally?

Two Thirds Think that New Transportation Funds Should Come From Tolls, Fares, & Taxes

This question was only Asked of supporters of any increase in funding... Question # 14... before this one- 14A.



Q14A. If new funds are needed for the regional transportation system, in your opinion, where should those funds come from? ONLY ASKED OF THOSE WHO SUPPORT AN INCREASE



Important Analysis Interpretation

Q14A. If new funds are needed for the regional transportation system, in your opinion, where should those funds come from? ONLY ASKED OF THOSE WHO SUPPORT AN INCREASE



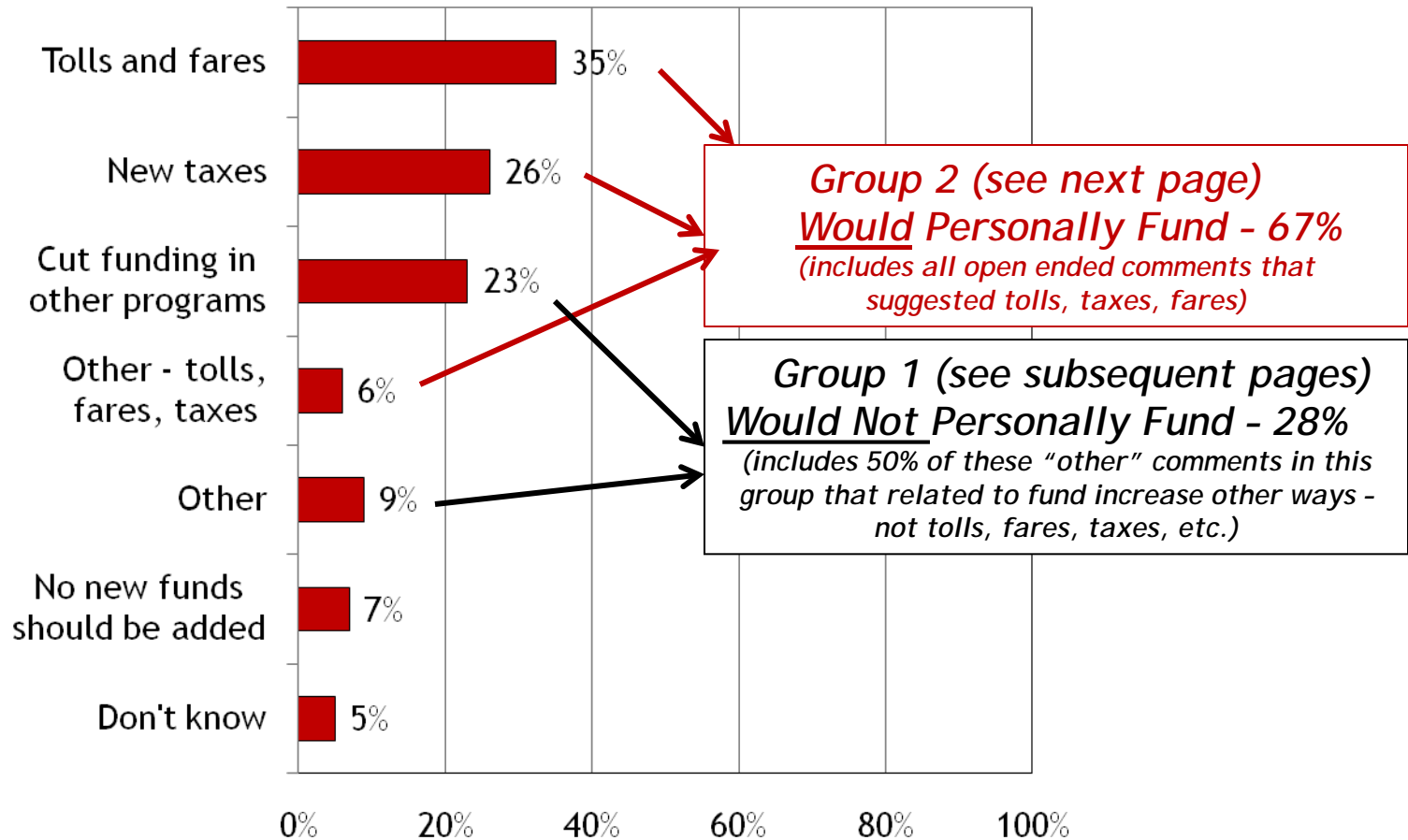
*One way to view the responses to this question is to assuming that when most people say the source of funds should be “tolls, fares, and taxes” that they are suggesting **they would personally be the source of funds.***

*Using this interpretation, we can speculate that **two-thirds** (61% said tolls/taxes/fares plus 6% who wrote in something similar to new taxes and/or tolls and fares in the “other” category) would be in favor of **personally funding** the transportation system through tolls, fares, and taxes.*

28% would prefer that the money come from funds already allocated to other programs.

2/3rds of Residents Who Support Increasing Funding Would Personally Fund the Transportation System

This question was only Asked of supporters of any increase in funding... Question # 14... before this one- 14A.



Q14A. If new funds are needed for the regional transportation system, in your opinion, where should those funds come from? ONLY ASKED OF THOSE WHO SUPPORT AN INCREASE



(As a subset of all of the supporters for increased funding should go to transportation....)

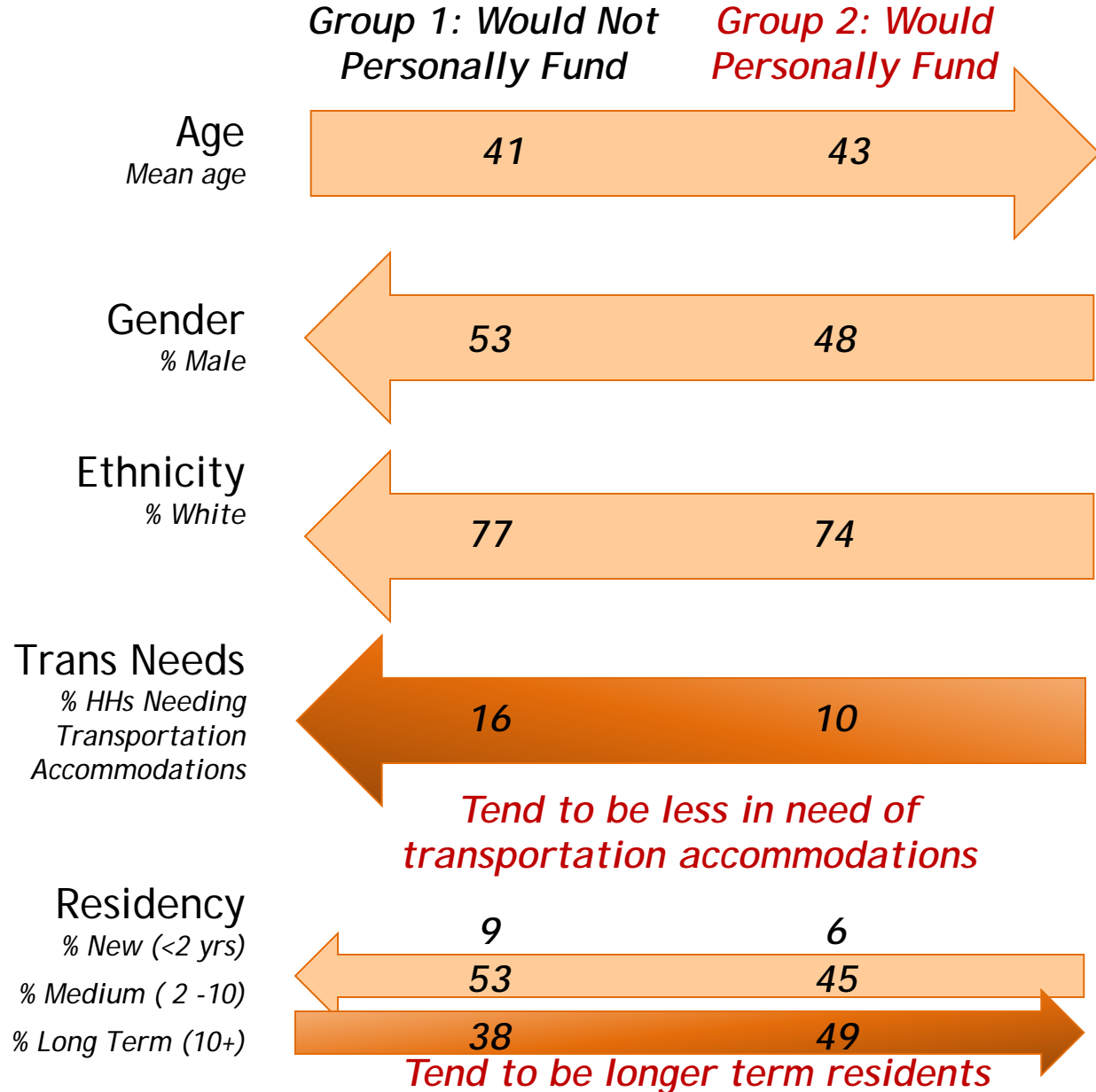
*Group 1 (see subsequent pages)
Would Not Personally Fund - 28%
(includes 50% of "other" comments that
related to fund increase other ways - not tolls,
fares, taxes, etc.)*

*Who Supports Increases In
Transportation Funding Without Using
Tolls, Fares, and New Taxes?*

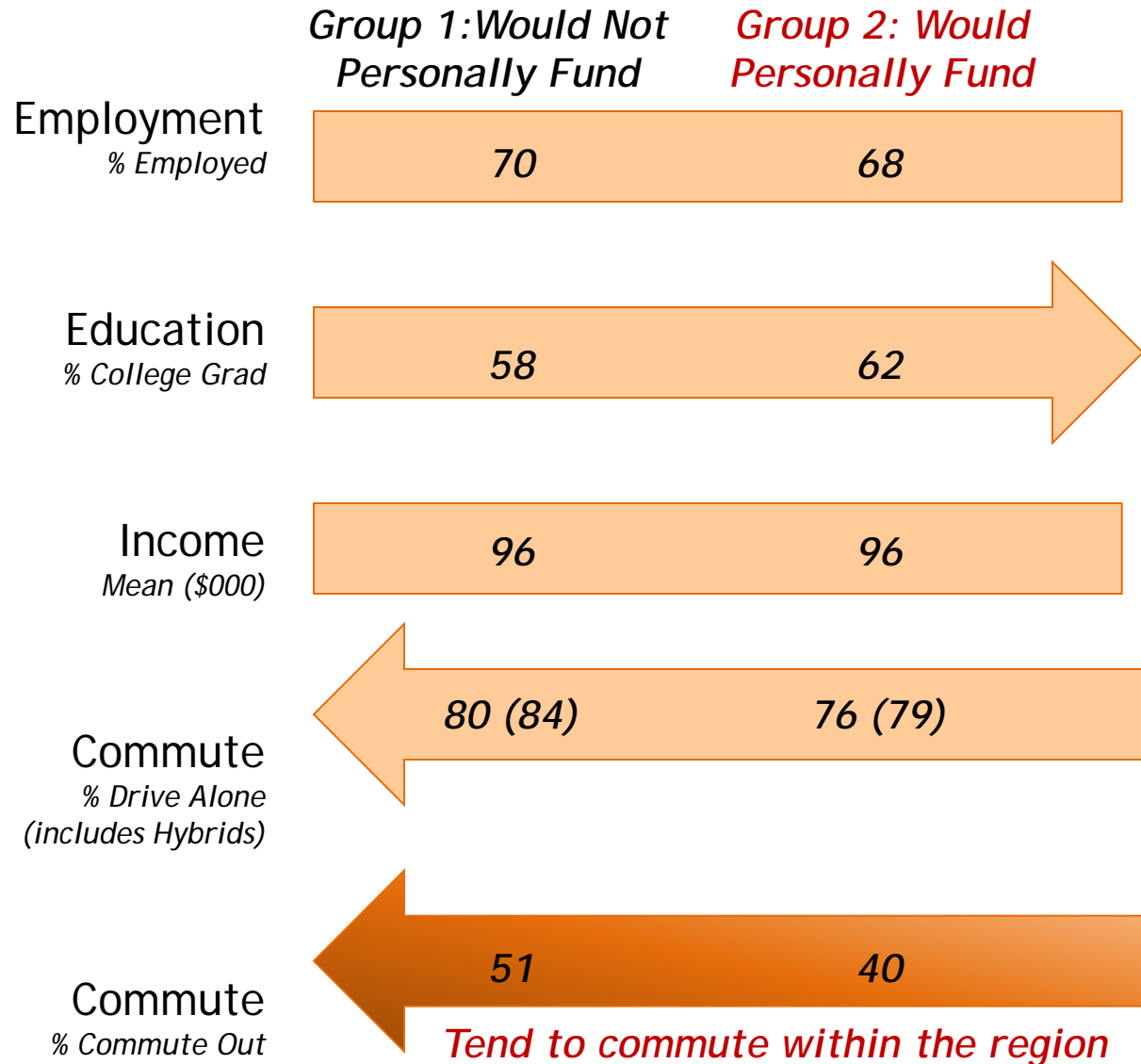
*Who Supports Increases In
Transportation Funding Using Tolls,
Fares, and New Taxes ?*

*Group 2 (see subsequent pages)
Would Personally Fund - 67%
(includes all open ended comments that
suggested tolls, taxes, fares)*

Would Pay for Funding Increases Through Tolls, Fares, and Taxes . . .



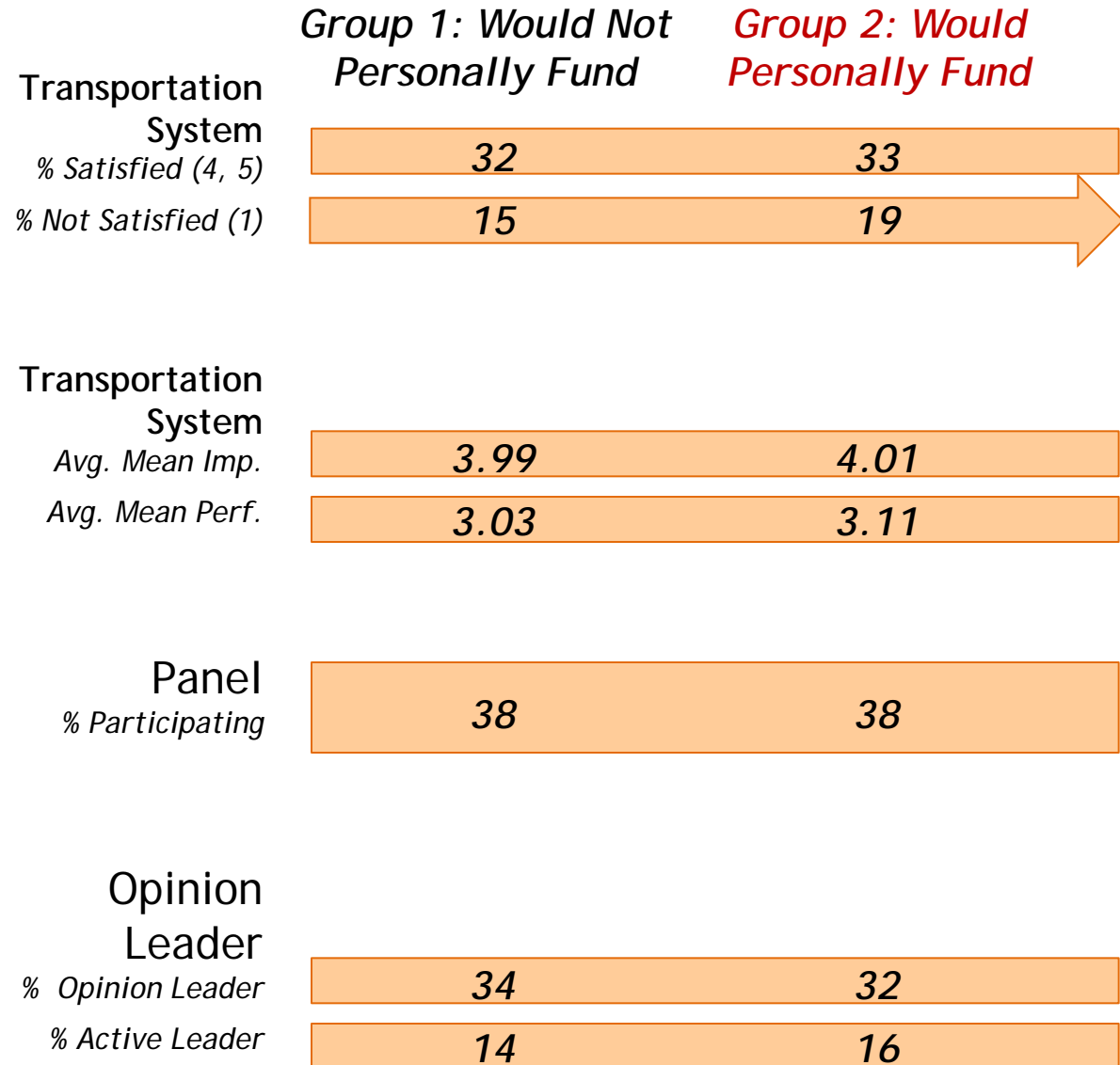
Would Pay for Funding Increases Through Tolls, Fares, and Taxes . . .



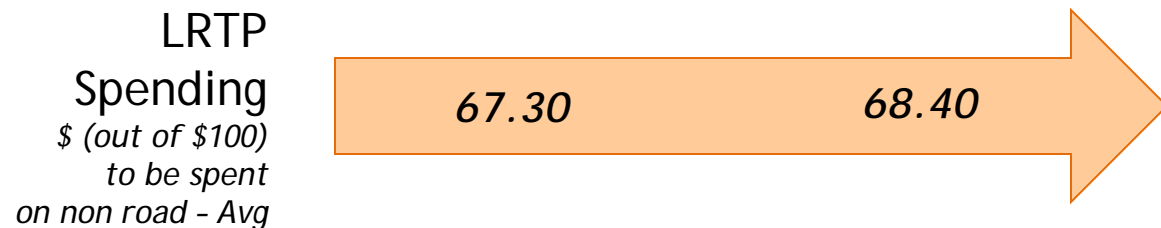
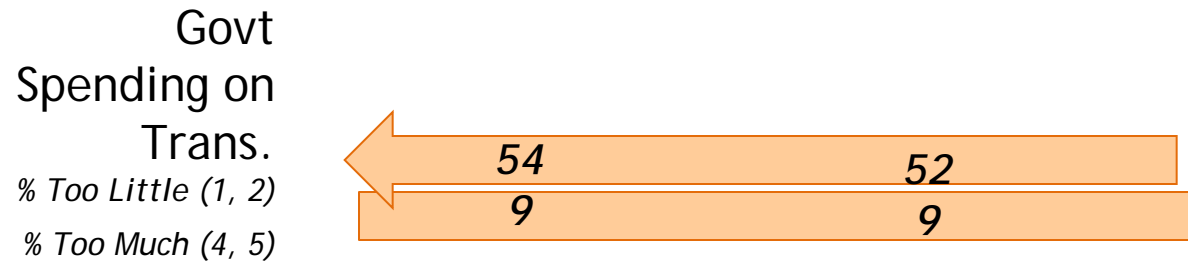
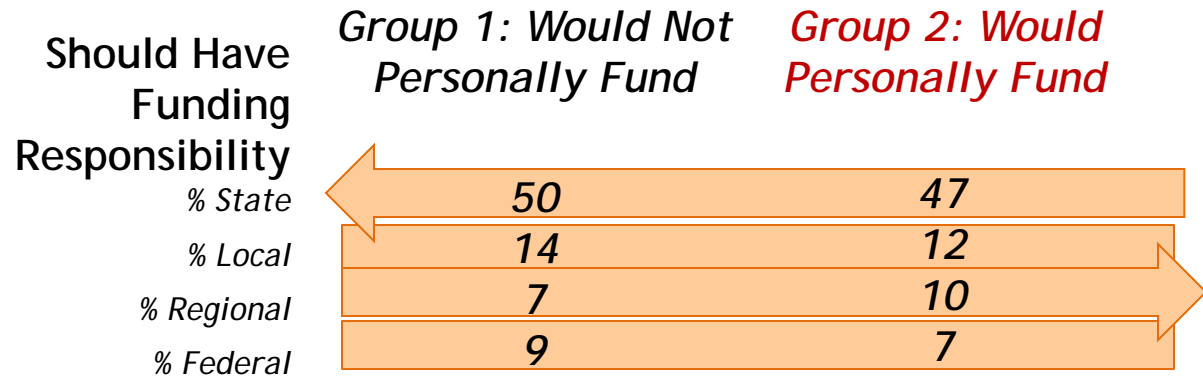
Would Pay for Funding Increases Through Tolls, Fares, and Taxes

Opinion Leaders:
Defined as those who participated in at least 2 activities in the past year

Active Opinion Leaders:
Defined as those who participated in at least 3 selected activities in the past year (= about 1/3 of Opinion Leaders)



Would Pay for Funding Increases Through Tolls, Fares, and Taxes



Recap of Source of Increased Funding

This Data Set Does Not Reveal Many Discernable Differences Between Those Who Would Pay for Funding Increases - Through Tolls, Fares, and Taxes - And Those Who Would Prefer Other Funding Alternatives.

The Biggest Difference Centers on Commuting In Or Out of The Region. The Commuters Who Commute Within The Region Are More Likely To Say They Would Fund Increases Personally (Taxes, Tolls, Fares).

Supporters Who Would Not Personally Fund (Tend To Be)

- More in need of transportation accommodations
- Relatively newer to the area
- More likely to commute out of the area

Supporters Who Would Personally Fund (Tend To Be)

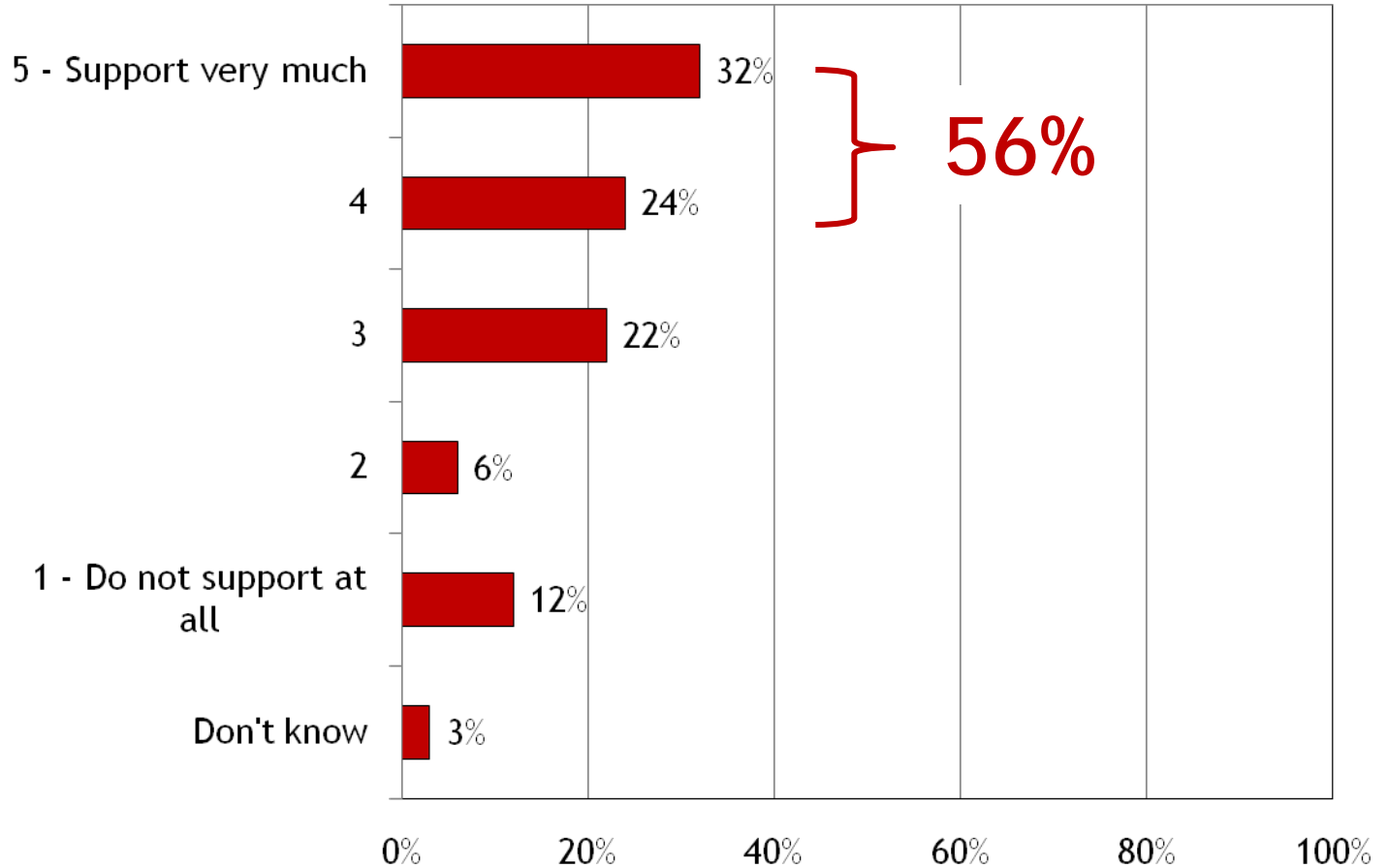
- Less in need of transportation accommodations
- Longer term residents
- More likely to commute within the area

Regional Transportation Authority



As a comparison, 67% of Charlottesville Residents were in favor of a Regional Transit Authority (rated 4 or 5) in a 2009 study.

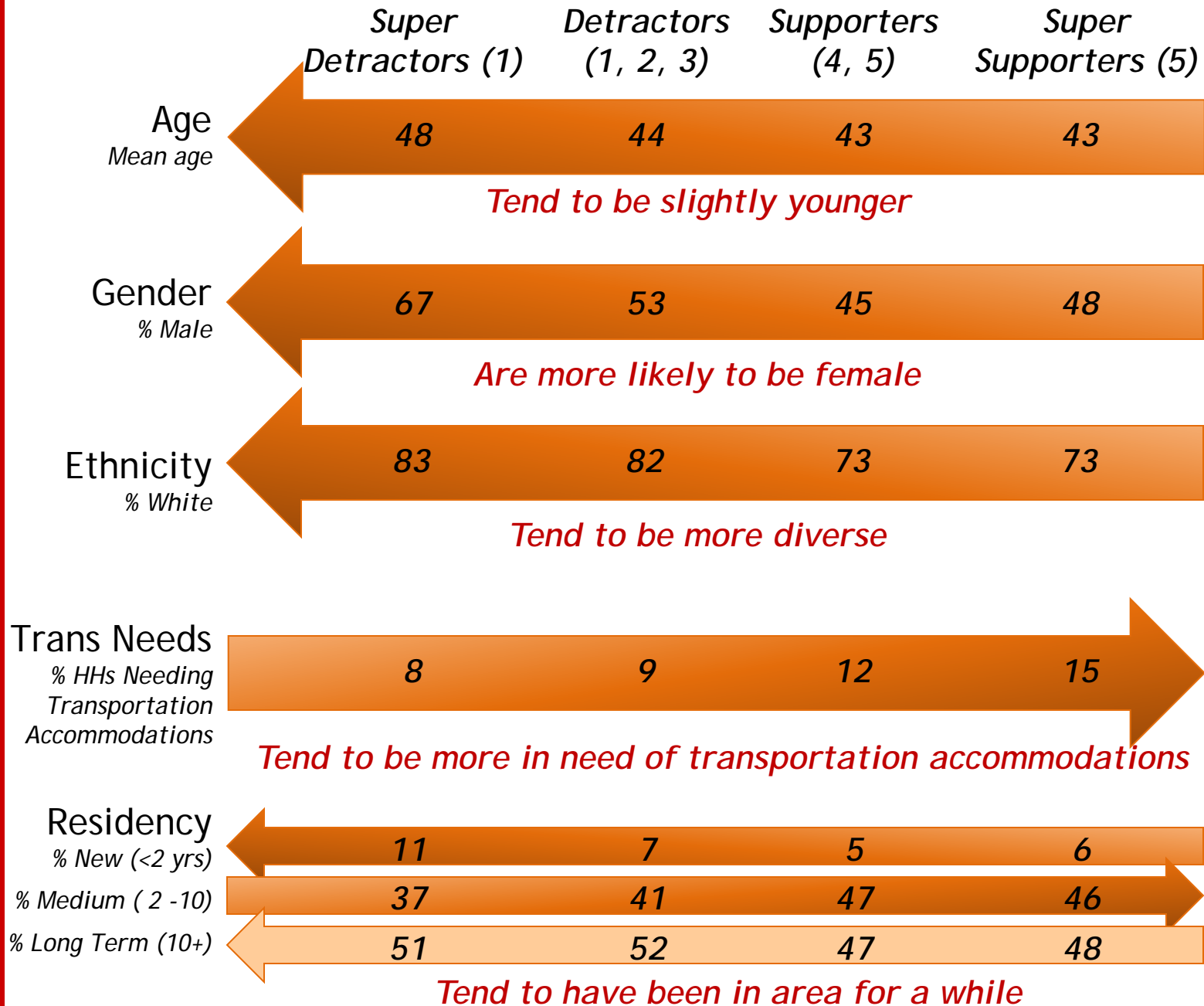
More than Half Support a Regional Transportation Authority



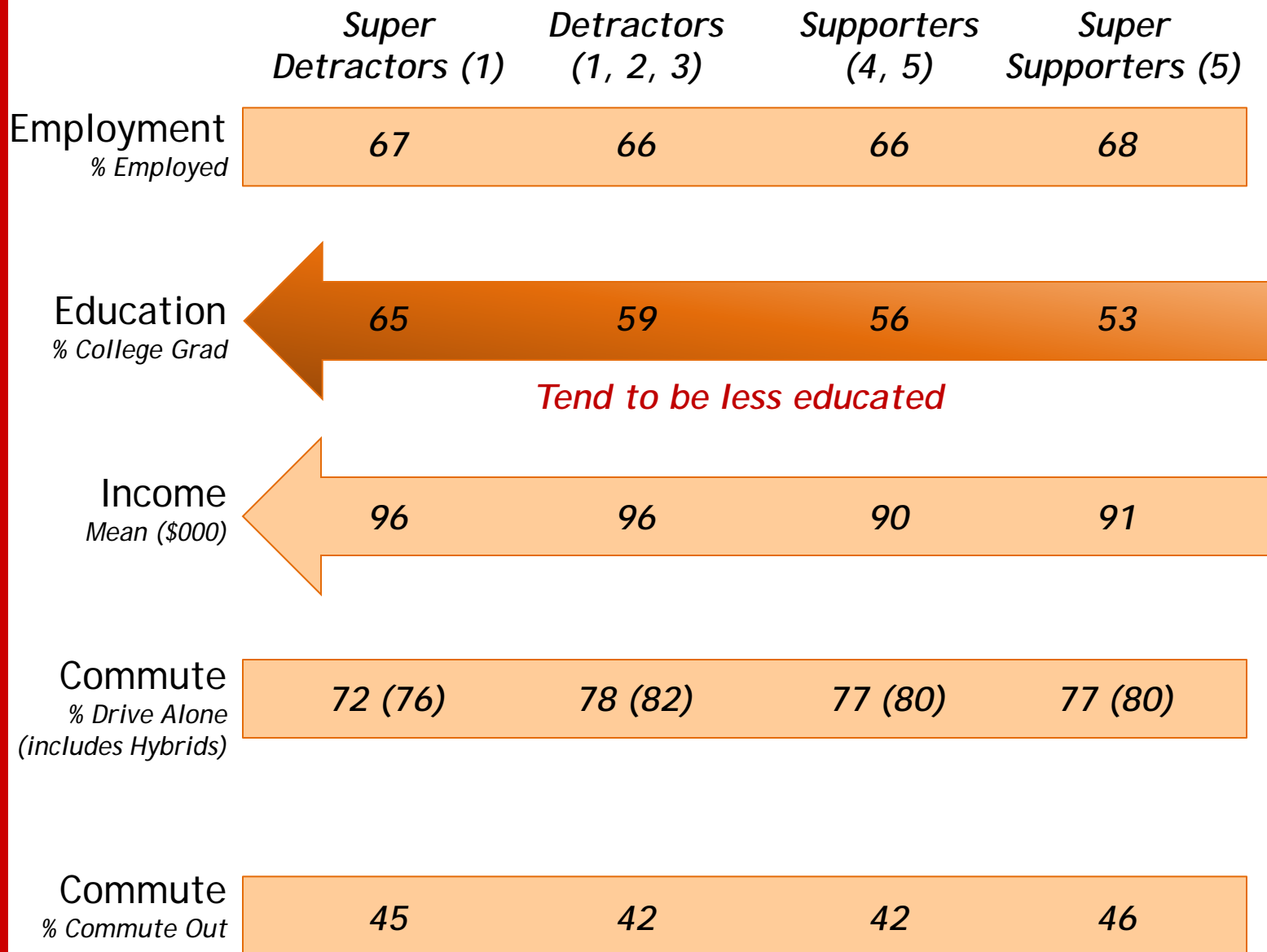
Q12B. To what extent do you support the establishment of a Regional Transportation Authority?



Those Who Support a Regional Transportation Authority . . .

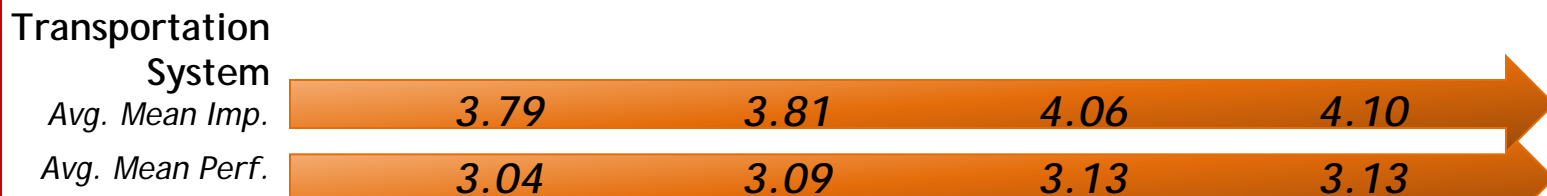
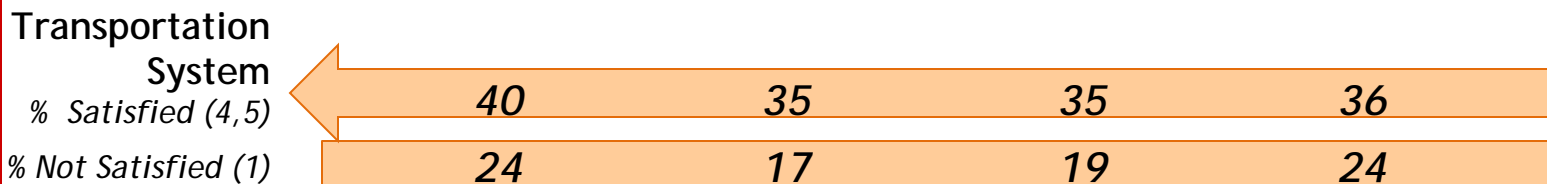


Those Who Support a Regional Transportation Authority . . .



Those Who Support a Regional Transportation Authority . . .

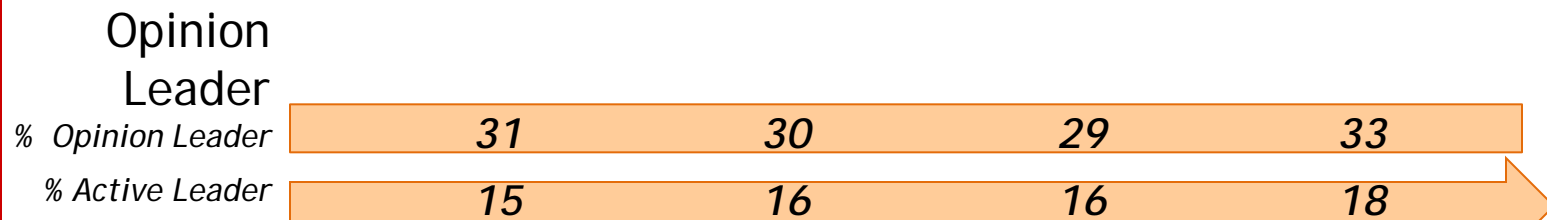
Super Detractors (1)
Detractors (1, 2, 3)
Supporters (4, 5)
Super Supporters (5)



Tend to find transportation system attributes more important and give the area higher ratings



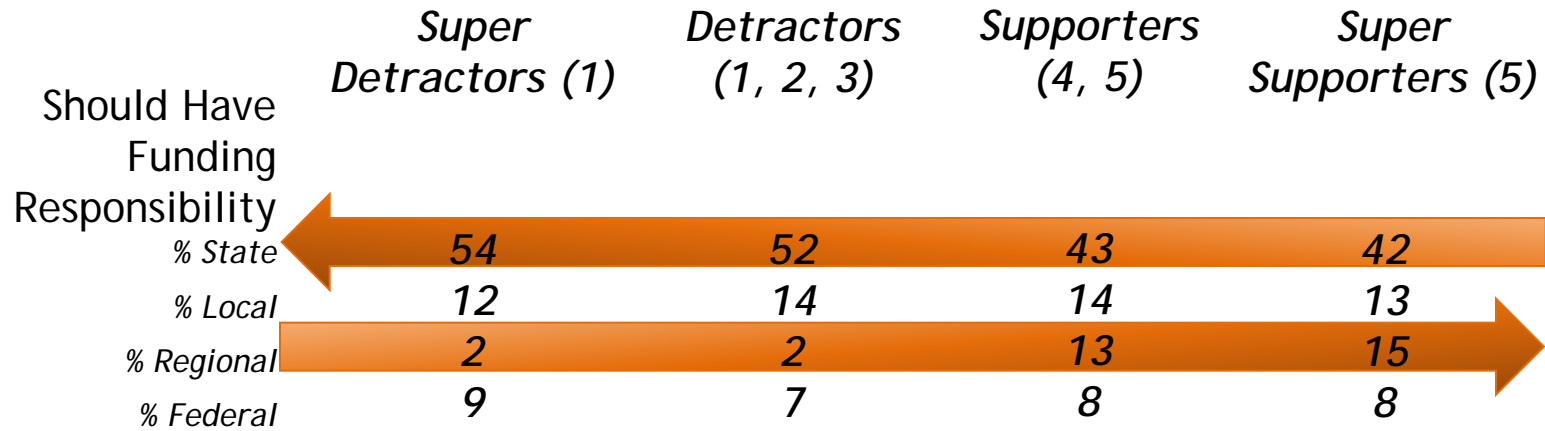
Tend to be more likely to volunteer for the panel



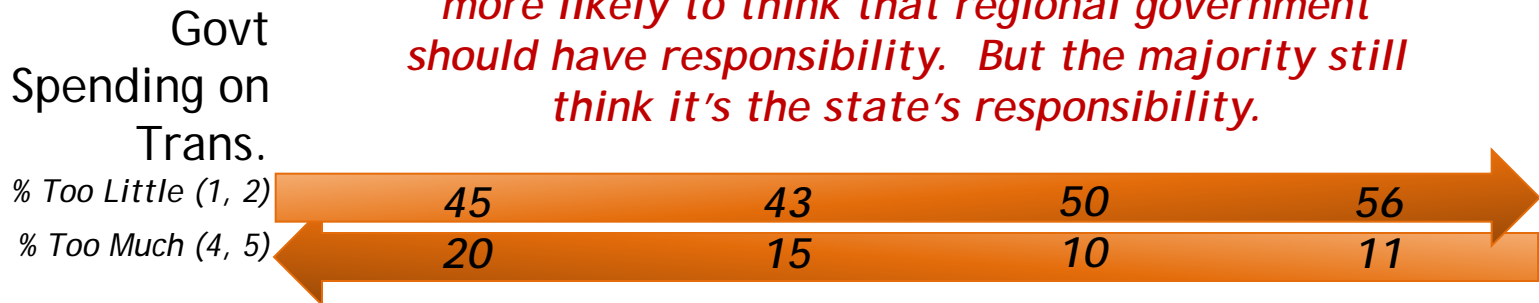
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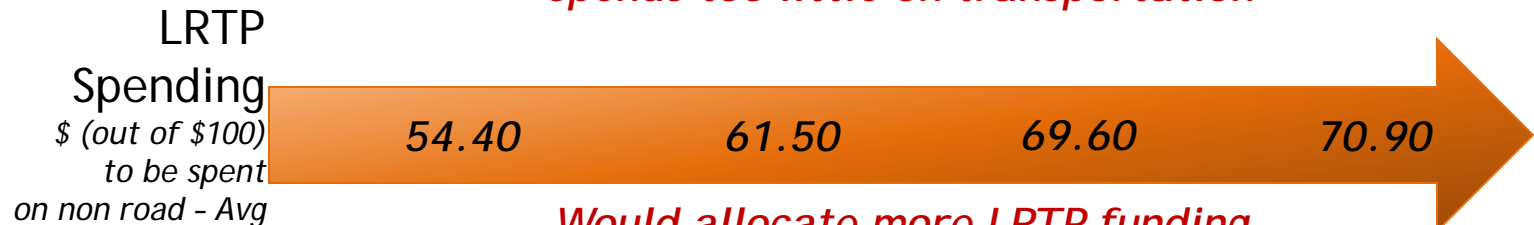
Those Who Support a Regional Transportation Authority . . .



Are less likely to think state government should have transportation funding responsibility and more likely to think that regional government should have responsibility. But the majority still think it's the state's responsibility.



Tend to think the government spends too little on transportation



Would allocate more L RTP funding to non-road related activities

Regional Transportation Authority (RTA) Recap

Compared to Non-RTA Supporters, Supporters of the RTA Tend To Be Younger, More Diverse, Longer Term Residents In Need Of Transportation Accommodations

Supporters

(Tend To Be)

- Younger
- Slightly More Female
- Diverse
- Longer-term residents
- Less educated
- More in need of transportation accommodations
- More likely to be a panel member

Non-Supporters

(Tend To Be)

- Older
- Slightly More Male
- Less diverse
- Relatively newer to the area
- More educated
- Less in need of transportation accommodations
- Less likely to be a panel member

Regional Transportation Authority (RTA) Recap

Compared to Non-RTA Supporters, Supporters of the RTA Tend To Believe Transportation Is More Important, Support An Increase In Transportation Funding, And Believe Funding Should Be Allocated To Non-road Related Activities

Supporters

(Tend To Think)

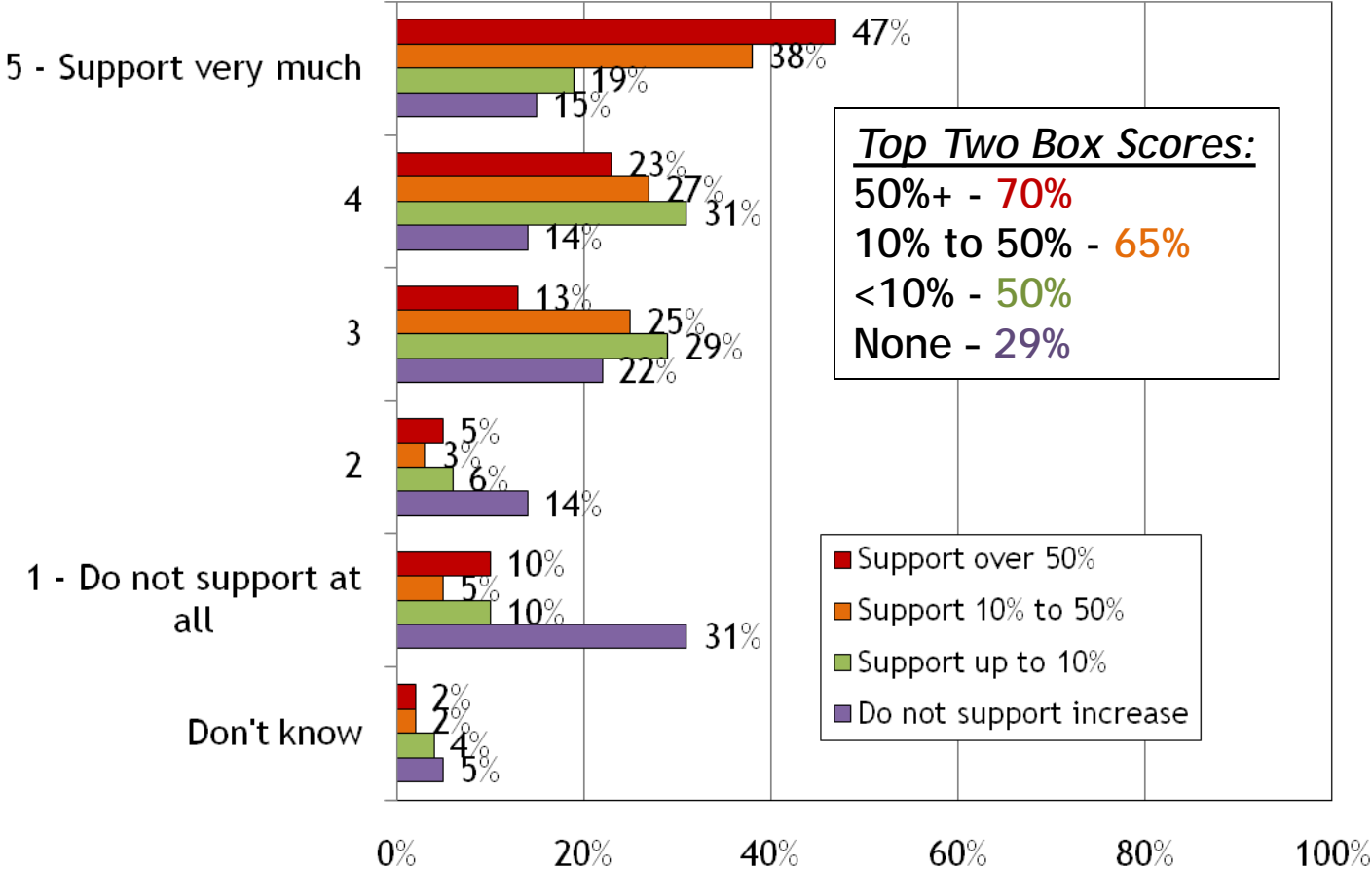
- Transportation attributes are more important and they rate area performance higher
- The state should have primary transportation funding responsibility, but are more likely than non-supporters to think regional government should have responsibility
- The government spends too little on transportation
- Transportation funding should be increased
- LRTP funding should be allocated to non-road related activities

Non-Supporters

(Tend To Think)

- Transportation attributes are less important and they rate area performance lower
- The state should have primary transportation funding responsibility, but are less likely than supporters to think regional government should have responsibility
- The government spends too much on transportation
- Transportation funding should not be increased
- LRTP funding should be allocated to non-road related activities, but less so than supporters

RTA Support Directly Correlates with Pro Funding Support

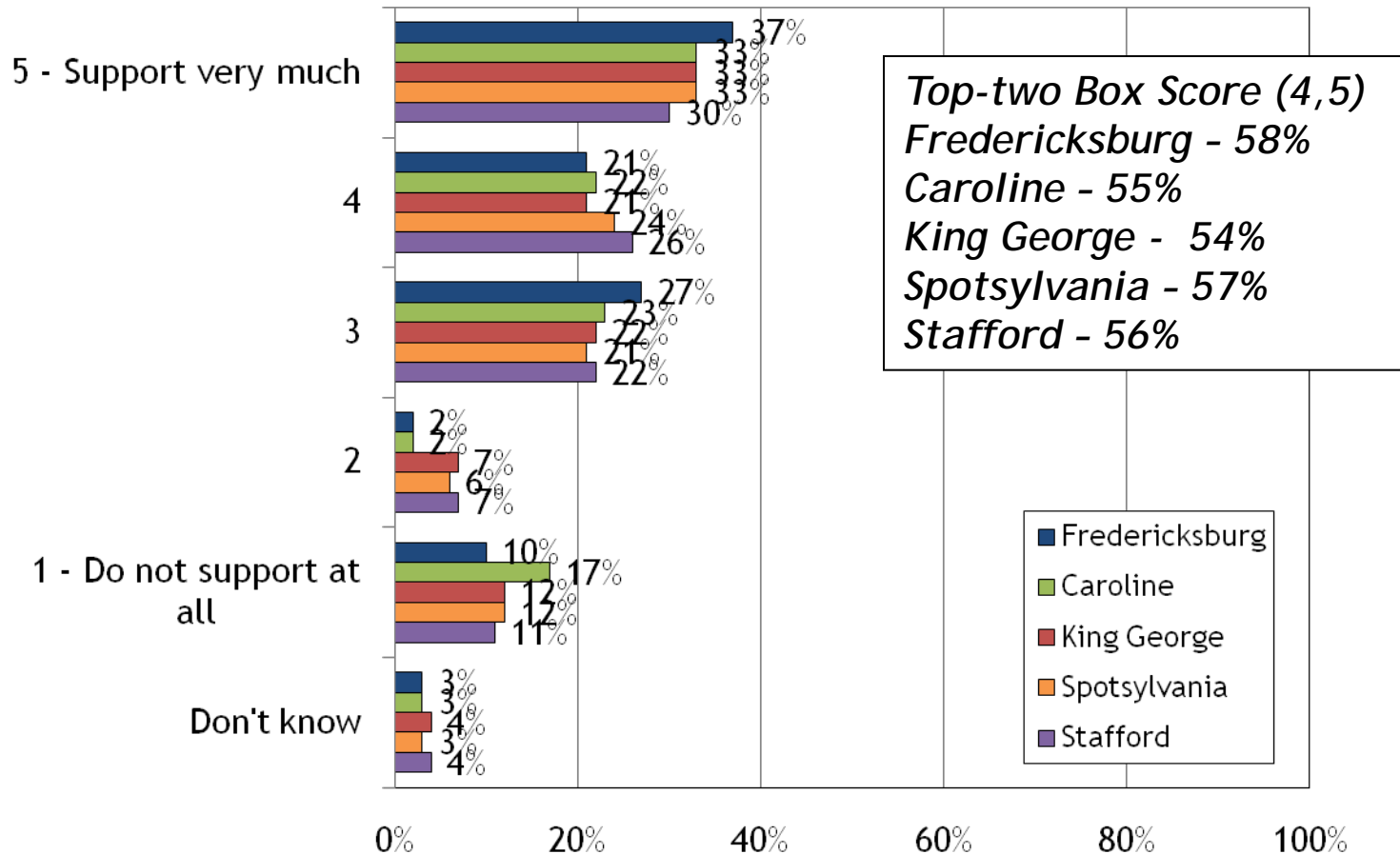


Q14. Which of the following statements best describes your support in regard to transportation funding for the Greater Fredericksburg Region?

Q12B. To what extent do you support the establishment of a Regional Transportation Authority?



All Areas Have Similar Support for an RTA

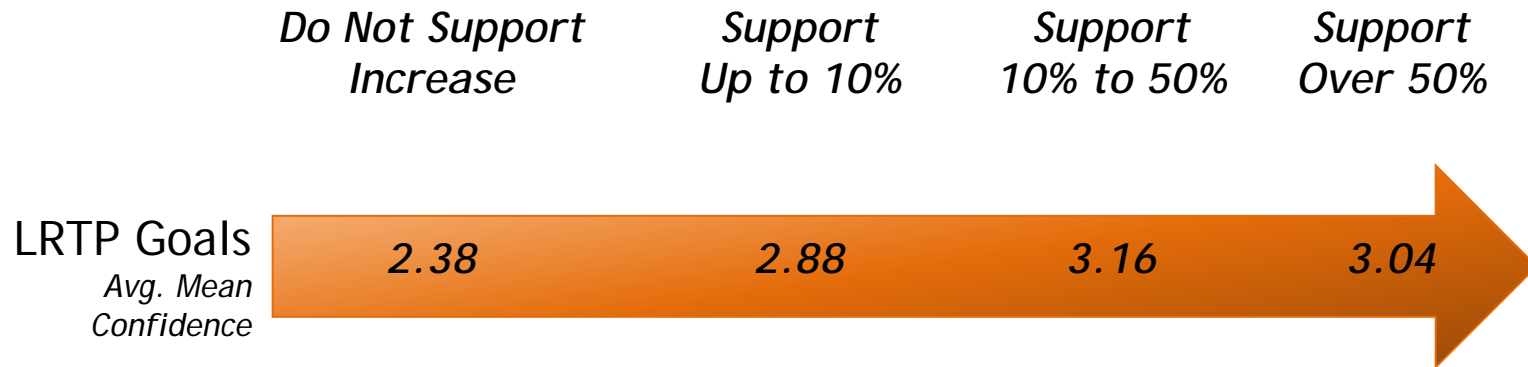


Q12B. To what extent do you support the establishment of a Regional Transportation Authority?



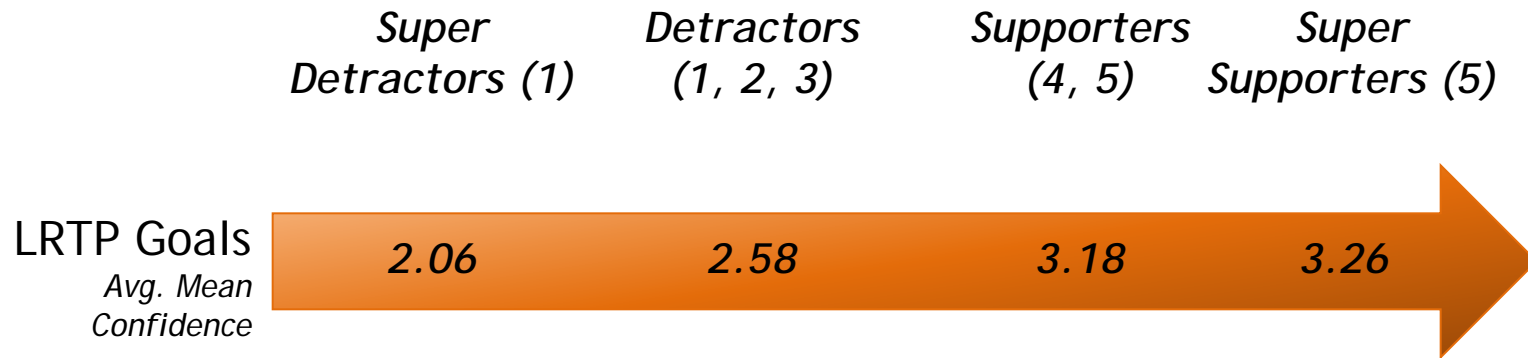
LRTP Impact

Those Who Support Increase In Transportation Funding . . .



*Tend to be more confident that the
L RTP goals will be accomplished*

Those Who Support a Regional Transportation Authority . . .



*Tend to be more confident that the
L RTP goals will be accomplished*

Take-A-Ways

(To date)

Take-A-Ways To Date

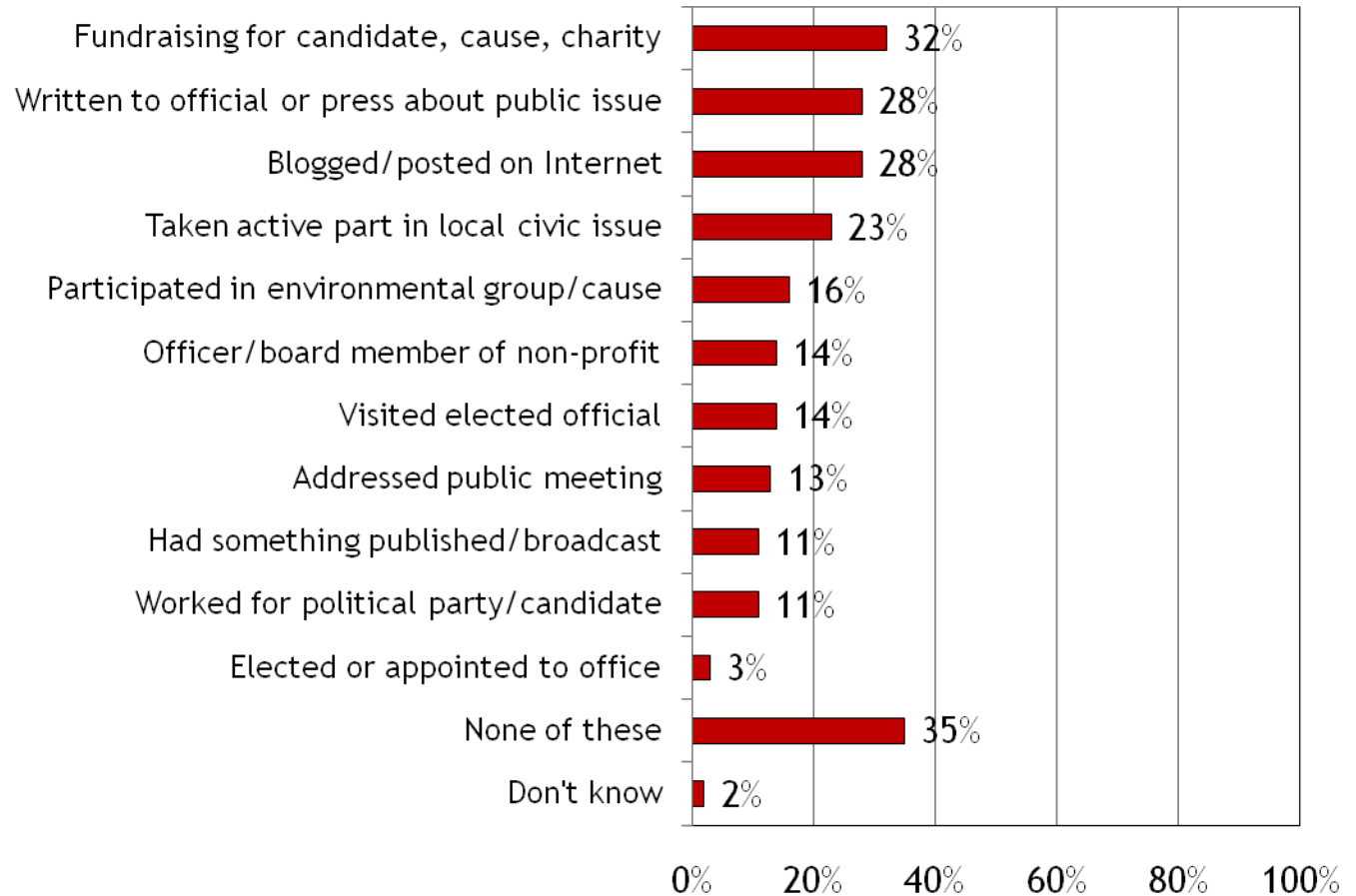
- Compared to non-supporters, supporters for an increase in transportation funding tend to be slightly older, slightly more upscale, opinion leaders who are relatively newer to the area. They also tend to be commuters who commute out of the area and people who have a greater need for transportation accommodations & the overall transportation system.
- While there's a greater level of support for increased funding among commuters who leave the area every day than commuters who remain within the FAMPO region, there tends to be lesser personal commitment with long distance commuters than with local commuters to pay for transportation funding increases with taxes, toll, fares.
- Compared to Non-RTA Supporters, Supporters of the RTA Tend To Be Younger, More Diverse, Longer Term Residents In Need Of Transportation Accommodations.

Take-A-Ways To Date

- There is a direct correlation between support for increase in transportation funding and support for the RTA
- Supporters of increased transportation funding and the RTA tend to be more confident that the LRTP goals will be accomplished.
- RTA supporters tend to think the government spends too little on transportation and would direct funding to non-roads.
- “Transportation attributes” - the topic itself - seems more important among supporters than non-supporters for all three issues -1) increase in funding, 2) supporting needed funds with personal funding (taxes, tolls, fares), and 3) support for the RTA. Educating residents on transportation issues makes sense to build support.
- Panel members skew towards RTA supporters. Use them future understand RTA issues.

APPENDIX: Opinion Leaders

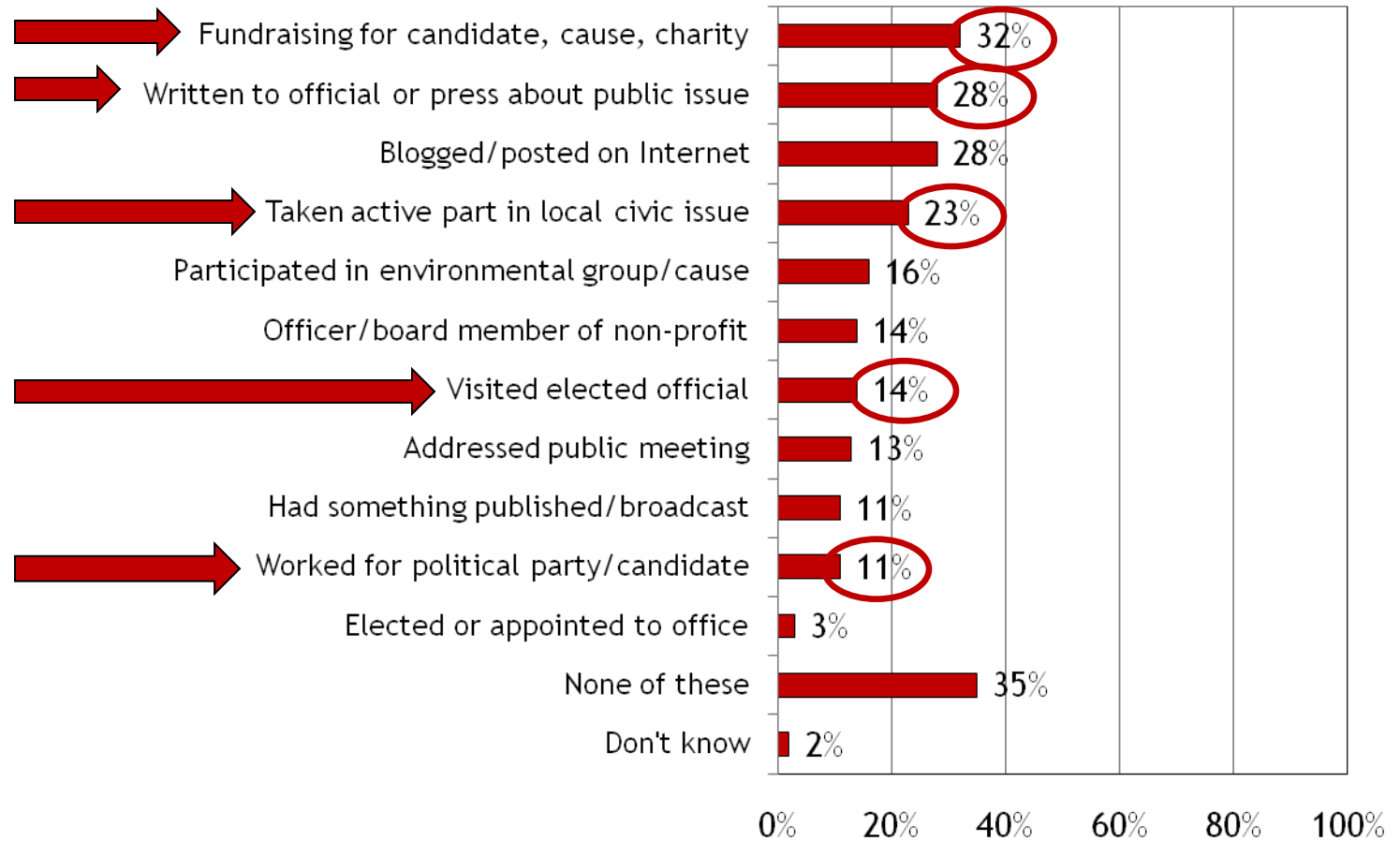
45% Are Considered “Opinion Leaders” or Have Participated in At Least Two of These Events in the Past Year



Q34. Which of the following activities, if any, have you done or participated in over the past 12 months?



16% Are Considered "Active Opinion Leaders" or Have Participated in At Least Three of These Selected Events in the Past Year



Q34. Which of the following activities, if any, have you done or participated in over the past 12 months?



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