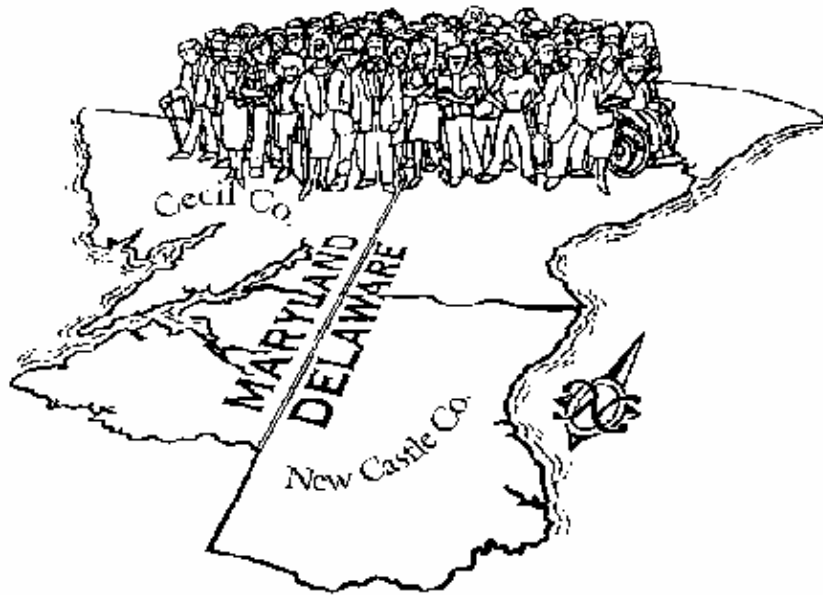


WILMAPCO

2008 Cecil County Public Opinion Survey Results Summary



*Survey completed by Public National Research Center Inc.
Report created by WILMAPCO September 2008*

www.wilmapco.org

September 29, 2008

WILMAPCO

About the Survey

PURPOSE

The Wilmington Area Planning Council (WILMAPCO) annually conducts a Public Opinion Survey, to gather information on the transportation choices made by residents of Cecil County, Maryland and to gauge their perceptions and thoughts about transportation and the policies and strategies contained in the 2030 Regional Transportation Plan (RTP). New Castle County residents are included in this survey every four years, concurrent with RTP updates. This is the tenth annual survey we have conducted. Specifically, the survey identified community:

- Perceptions about transportation
- Perceptions about congestion
- Resident mode choice
- Familiarity with WILMAPCO

PROCESS

The survey was conducted through telephone interviews using randomly selected telephone numbers. Surveyors interviewed 600 Cecil County residents, ages 18 years and older. Aspen Media and Market Research, a survey call center, conducted the interviews between June 20 and July 8. Each survey took approximately 10 minutes. Interview responses were imported into a dataset for analysis by National Research Center, Inc. The sample selection has a confidence level of 95% and a sampling error of +/- 4%. Surveyors had a response rate of approximately 32%.

RESULTS

The results summarize responses about satisfaction with the transportation system, travel mode choice, perception of congestion, ratings of public transportation, familiarity with WILMAPCO and the demographics of those surveyed. The results are provided with comparisons of previous years when applicable.

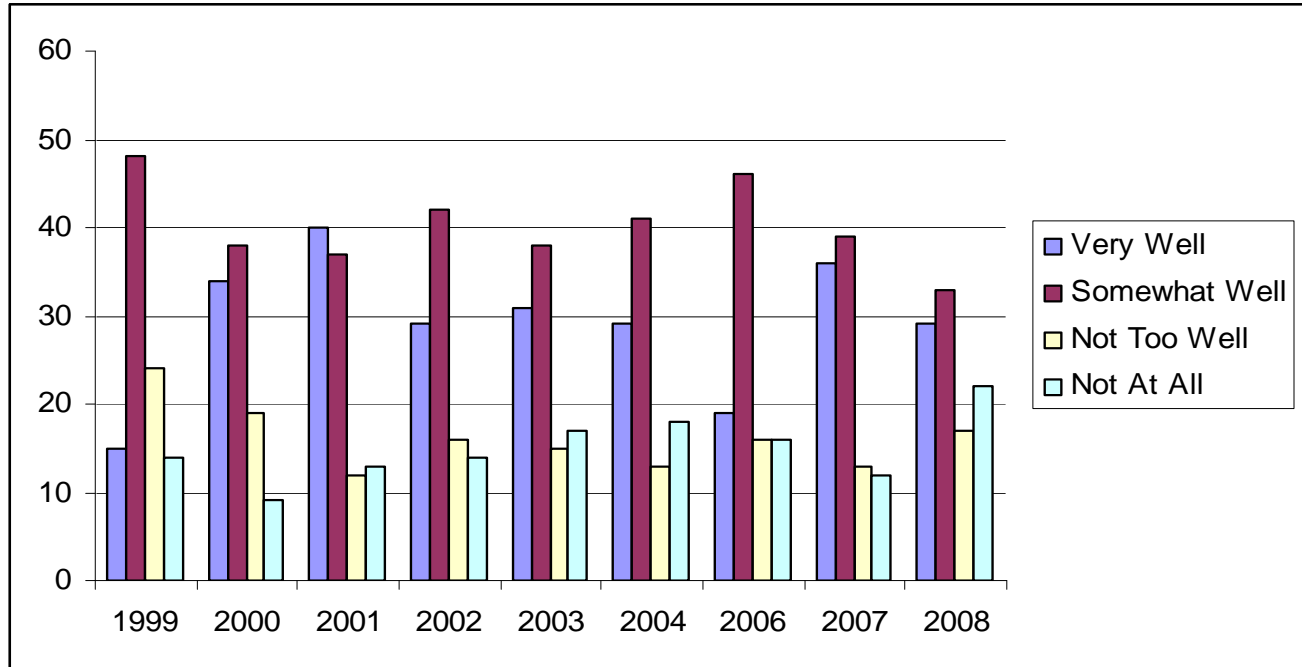
This is a summary providing highlights of the survey. If you would like more details on the complete report, please contact:

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Perceptions of the Transportation System

Residents interviewed were asked how well they felt the current transportation system meets their travel needs. Sixty-two percent of respondents reported feeling that their transportation needs were “somewhat” or “very” well met in 2008, down from 74% in 2007. The percent of respondents stating their needs are “not at all” met increased dramatically from 12% in 2007, to nearly double that (22%) in 2008 (see Figure 1).

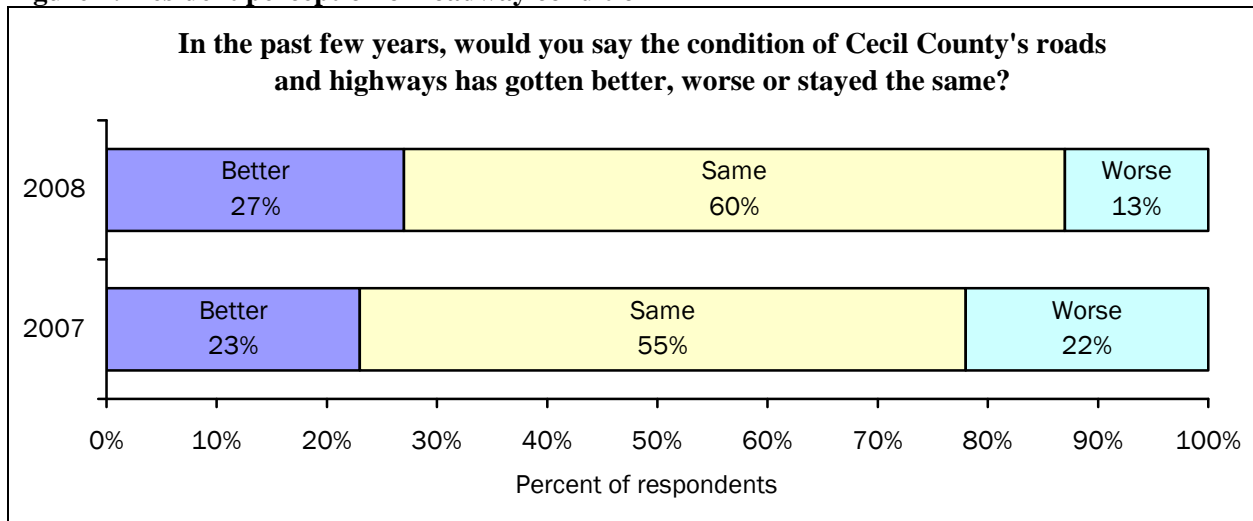
Figure 1: Rating of current transportation system



While respondents reported a decreased satisfaction with the overall transportation system, when asked to rate the condition of roads and highways in Cecil County, almost two-thirds (66%) thought they were “excellent” or “good;” from just over half (55%) that felt this way in 2007. The portion of respondents who felt that the condition of county roads and highways had gotten worse dropped from 22% in 2007 to 13% in 2008 (see Figure 2). About a third of respondents said they had noticed improvements made by the State to the transportation system; about a quarter of respondents noticed improvements in 2007.

The Maryland Department of Transportation (MDOT) conducted a statewide survey in the summer of 2008. While there were only 31 Cecil County respondents nearly half (46%) reported being completely unsatisfied with public transportation systems in Cecil County.

Figure 2: Resident perception of roadway condition



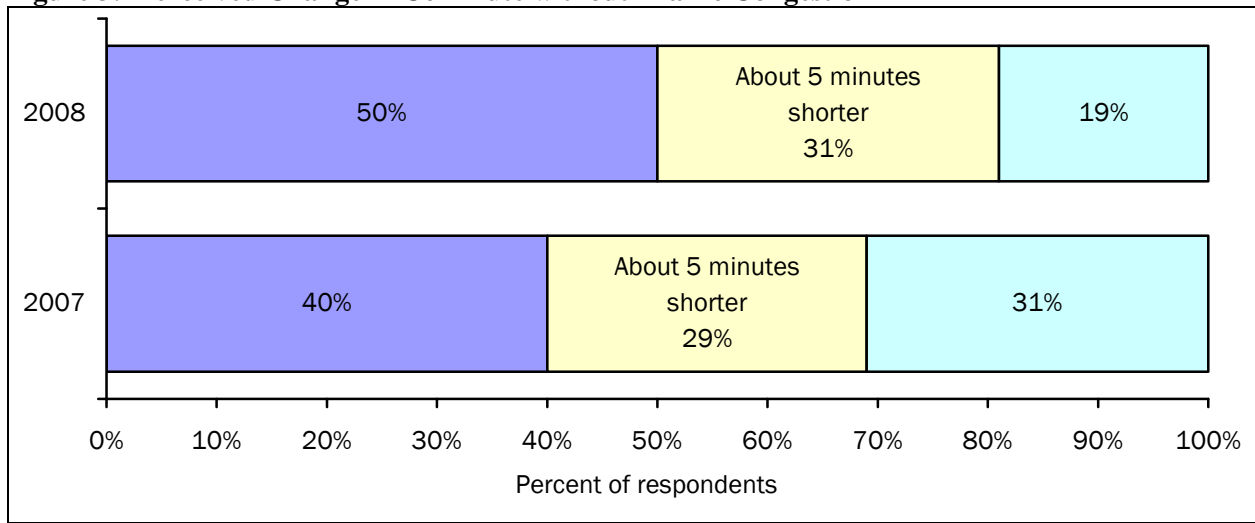
Perceptions of Congestion

Employed respondents were asked how often they experienced traffic congestion during their work commute. Ten percent fewer respondents reported finding themselves in traffic congestion on the way to work in 2008 than 2007 (see Table 1). Respondents were asked two questions related to the lengths of their commutes: one asked the average length and the other asked how long their commute would be if there was no congestion. The responses between these questions were compared to gauge the perceived change in the length of the commute. Half of respondents indicated that their commutes would stay the same if there was no congestion compared to 40% of respondents in 2007 (see Figure 3).

Table 1: Ratings of congestion during the work commute

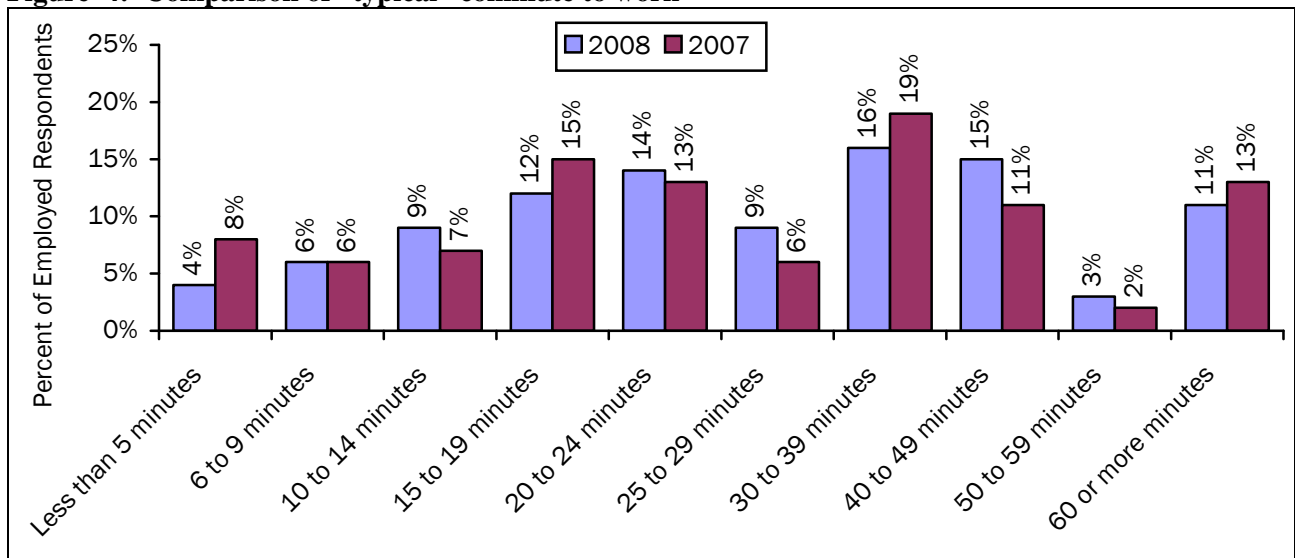
	Most of the Time	Sometimes	Rarely	Never
2008	22	25	35	19
2007	32	25	29	14
2006	29	20	21	18
2004	25	25	17	20
2003	26	31	23	17
2002	18	28	24	22
2001	28	24	24	16
2000	26	30	24	20
1999	24	29	29	18

Figure 3: Perceived Change in Commute without Traffic Congestion



Commute times ranged with 26% of residents stating their commute took between 15 and 24 minutes and 31% of respondents commuting between 30 to 49 minutes. These results were similar to the 2007 results (see Figure 4).

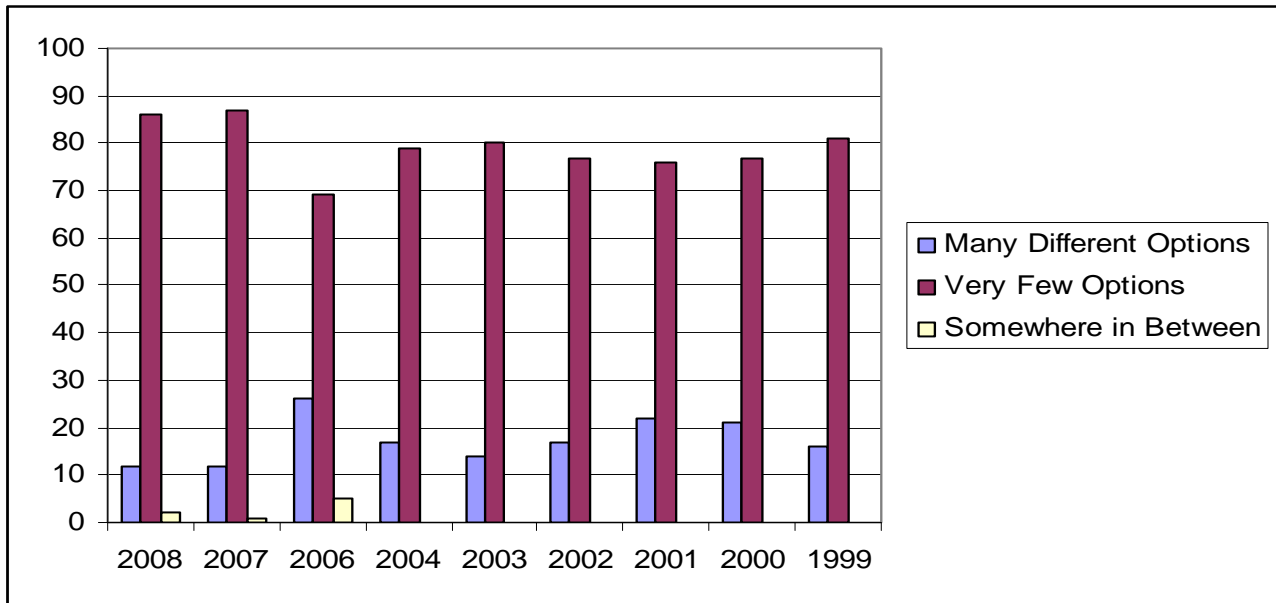
Figure 4: Comparison of “typical” commute to work



Residents’ Mode Choice

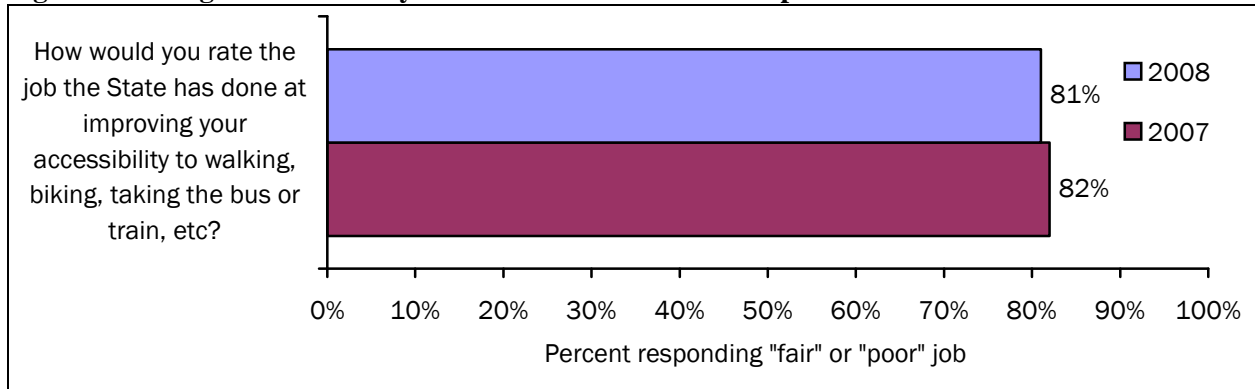
In general, Cecil County residents feel like they do not have a lot of transportation options; 86% of respondents in 2008 reported they have “few” options (a similar portion of respondents felt this way in 2007). This was a greater proportion than in 2006, when 69% reported they have “few” choices (see Figure 5). Consistently, between 1999 and 2008, the majority of Cecil County residents surveyed stated that they have very few transportation options.

Figure 5: Perceptions of availability of transportation options



Respondents' assessment of the job the State is doing in improving accessibility to alternative modes of transportation was low; 8 in 10 respondents felt the State was only doing a "fair" or "poor" job. (see Figure 6).

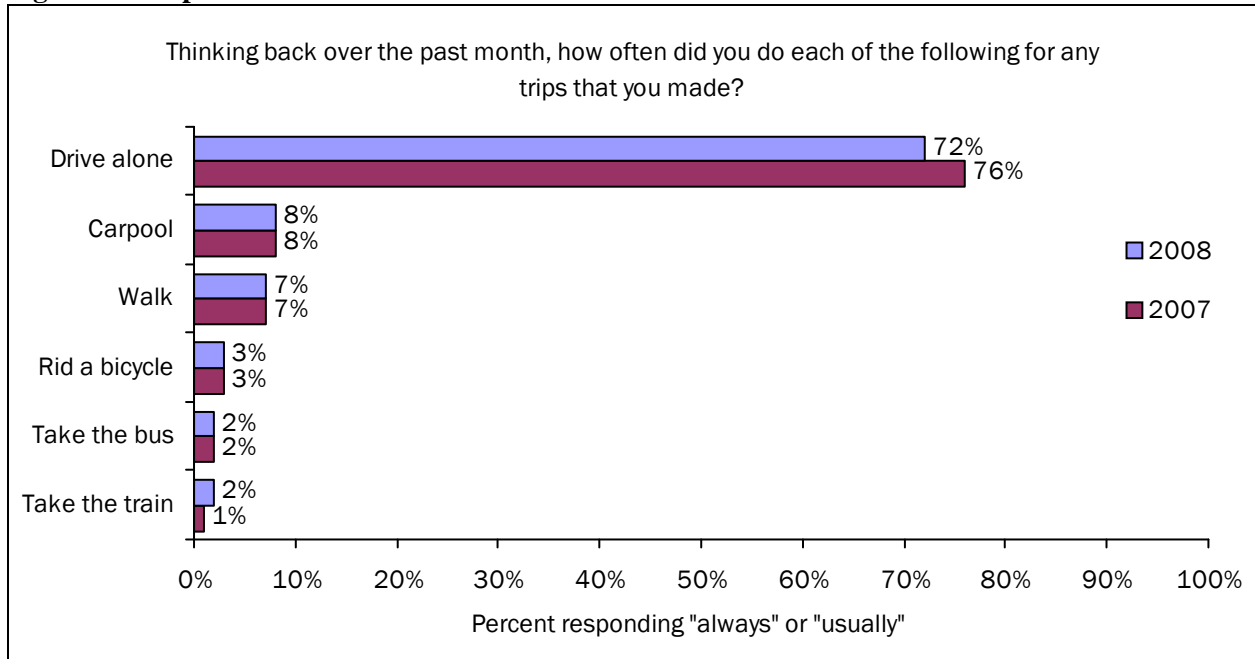
Figure 6: Ratings of accessibility to alternative modes of transportation



For most respondents, the vast majority of trips made were made by driving alone (see Figure 7). Among student respondents, 70% said they usually drove alone for their school commute (compared to 74% in 2007), with 15% reporting carpooling (up from 2% in 2007). Among employed respondents, 87% reported that they usually drove alone for the work commute. Employed respondents were asked whether their type of employment permitted them to work out of their home. Compared to 2007, fewer respondents reported being able to do so (22% versus 38% in 2007). Of those, 61% were able to telecommute from work (down from 71% in 2007), and 25% were in a home-based business.

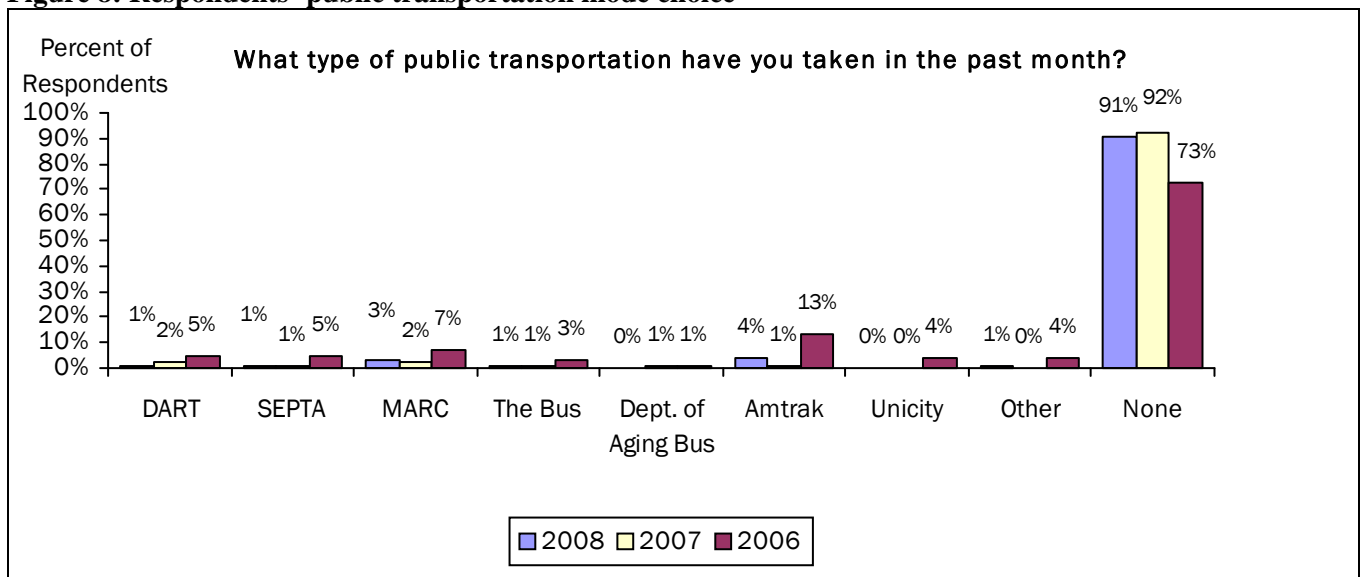
According to the MDOT survey nearly 80% of respondents reported that they would use bus and train more often if conditions were right. Fifty-six percent reported they would use bicycle more often, and over 70% reported they would walk more often with improved conditions.

Figure 7: Respondent's mode choice



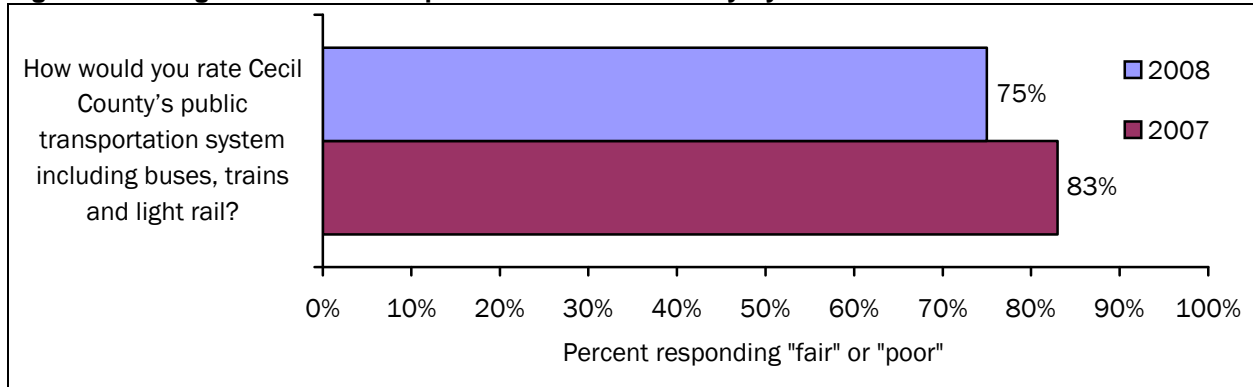
Respondents were asked if they had used any public transportation in the last month and over 90% said that they had not used any, similar 2007 survey results (92%). Residents stating use of AMTRAK train increased three percent from 2007 (see Figure 7). The MARC bus was the most frequently used bus (3%) while only one percent reported using SEPTA and DART (see Figure 8).

Figure 8: Respondents' public transportation mode choice



When asked to rate the public transportation system in Cecil County, ratings improved from 2007. While still rated rather low, only 75% of respondents rated the public transportation system as “fair” or “poor” compared to 83% in 2007 (see Figure 1).

Figure 1: Ratings of Public Transportation in Cecil County by Year



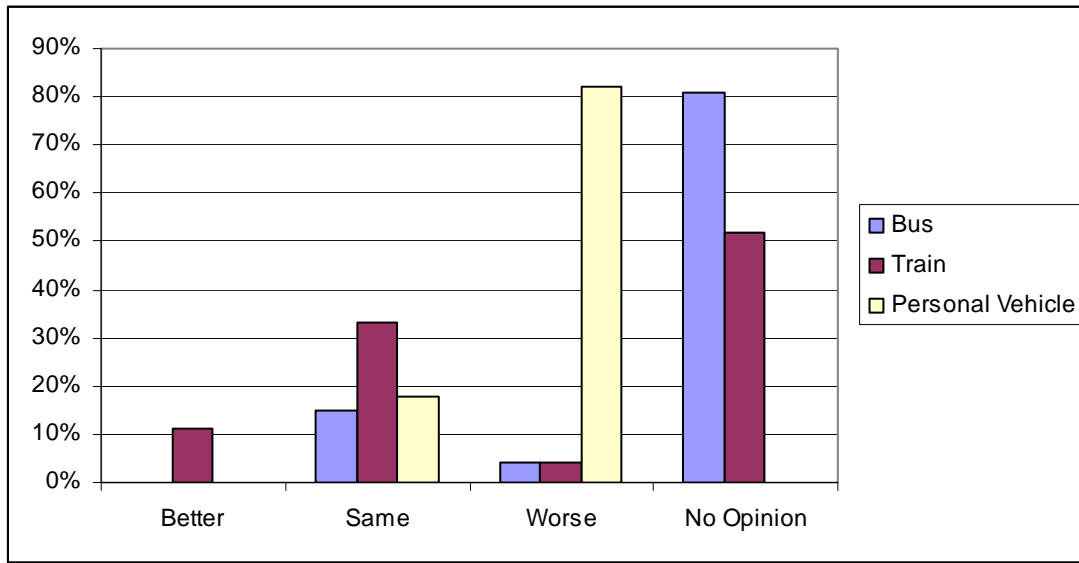
When asked whether the mass transit system had gotten better, gotten worse or stayed about the same over the past few years, the proportion of respondents that thought it had deteriorated decreased from 18% in 2007 to 3% in 2008 (see Table 2).

Table 2: Improvements to the public transportation system

Would you say the public transportation system has gotten better, worse or stayed about the same over the past few years?	2007	2008
Better	24%	29%
Same	58%	69%
Worse	18%	3%

The MDOT survey asked respondents if travel by various modes was the same, better or worse than five years ago. The majority of respondents reported no opinion regarding bus or train travel. Of those with an opinion, none thought that bus service has gotten better, while 11% felt train had gotten better. Thirty-three percent felt train service stayed the same and 15% felt bus travel was the same with only 4% reporting conditions have gotten worse for train or bus travel. Eighty-two percent reported worse conditions for personal vehicles (see Figure 10).

Figure 10: *Rating of travel mode (MDOT Survey)

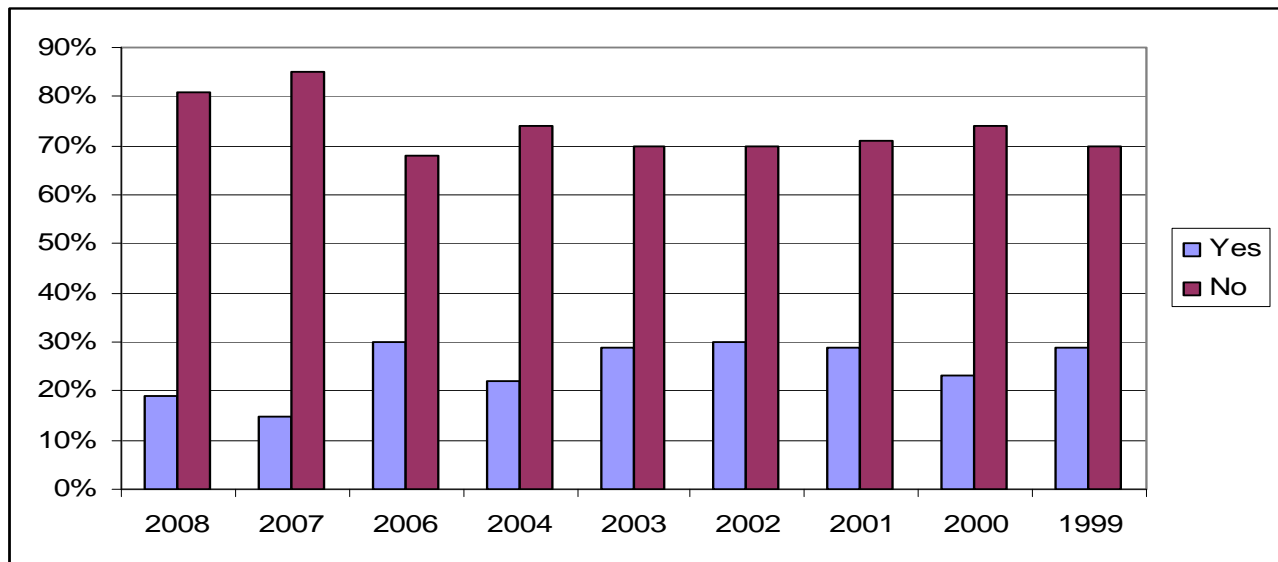


* n=31

Familiarity with WILMAPCO

Nineteen percent of those participating in the 2008 Public Opinion Survey said they were familiar with WILMAPCO, four percent more than 2007 (see Figure 11).

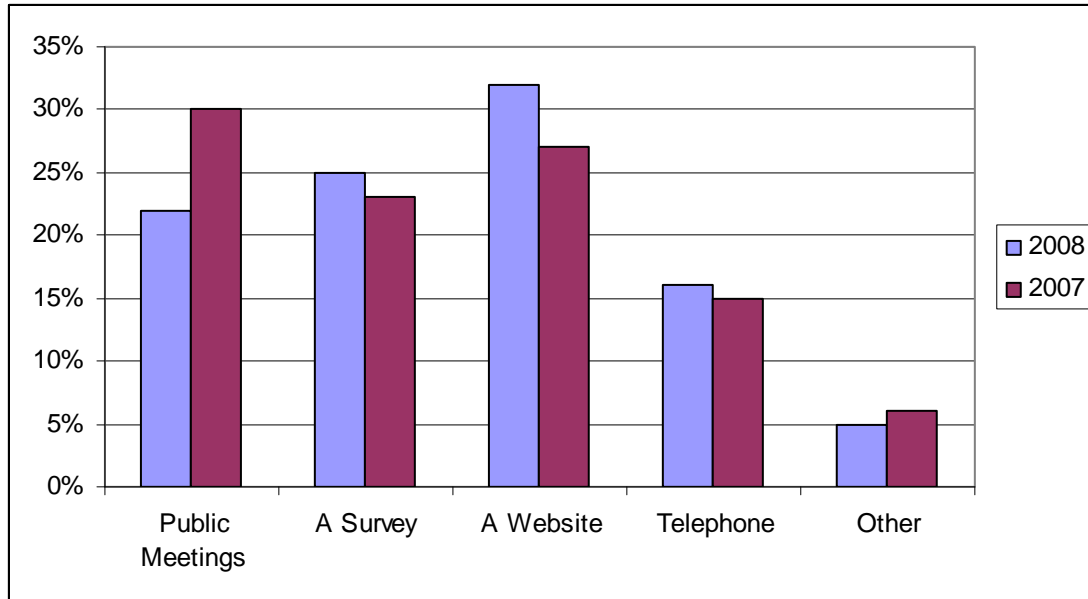
Figure 11: Familiarity with WILMAPCO



When asked how they would rate their opportunities to participate in transportation planning, most respondents (77%) considered their opportunities to be only “fair” or “poor”. There was no clear consensus on the preferred way to communicate with planners; however the portion of respondents preferring a Web site increased from 27% in 2007 to 32% in 2008. Public meetings were favored by

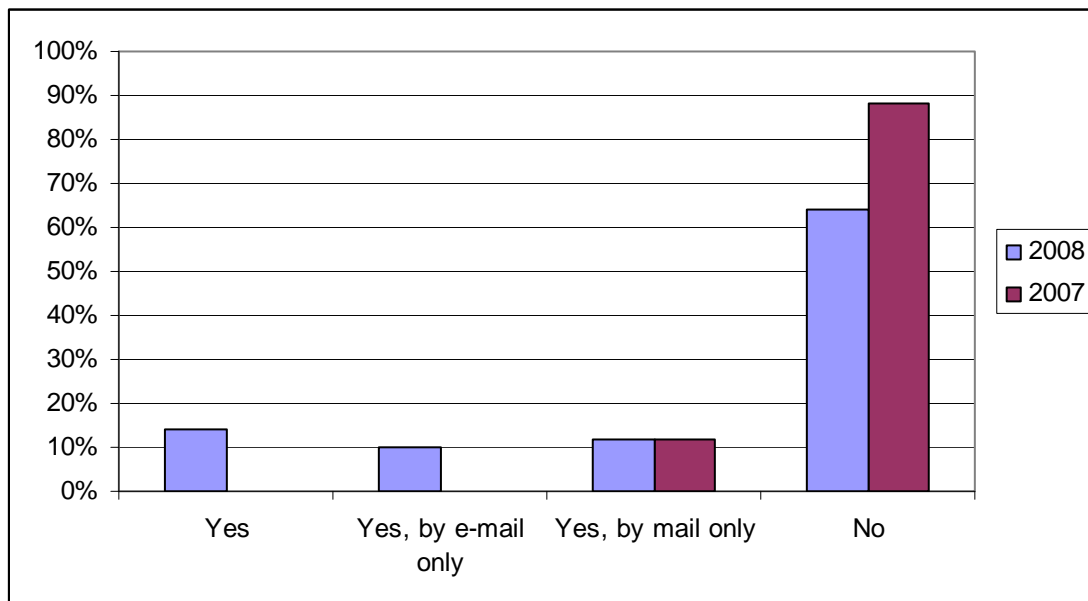
fewer respondents this year than last year; preference for this type of feedback dropped from 30% to 22% (see Figure 12).

Figure 12: Respondents preferred method to provide feedback to planners



Although the ratings of opportunities to participate in transportation planning were low, about one-third of those completing the survey said they were interested in receiving free newsletters or public meeting announcements from WILMAPCO, representing an over 20% increase from 2007. (see Figure 12).

Figure 12: Preferred method of receiving information from WILMAPCO



Who we surveyed

DEMOGRAPHICS

This survey group consisted of 49% male and 51% female participants, the majority of whom identify themselves as white (90%). Sixty-five percent of respondents reported their highest level of education as high school graduate or some college. Overall, the majority of respondents (45%) were between the ages of 30 and 49. Nearly 40% of respondents stated that their income is over \$80,000 per year, an eight percent increase from last year. Slightly over half of respondents have lived in Cecil County for more than 20 years or all of their life (53%), and have two motor vehicles (38%) in their household.