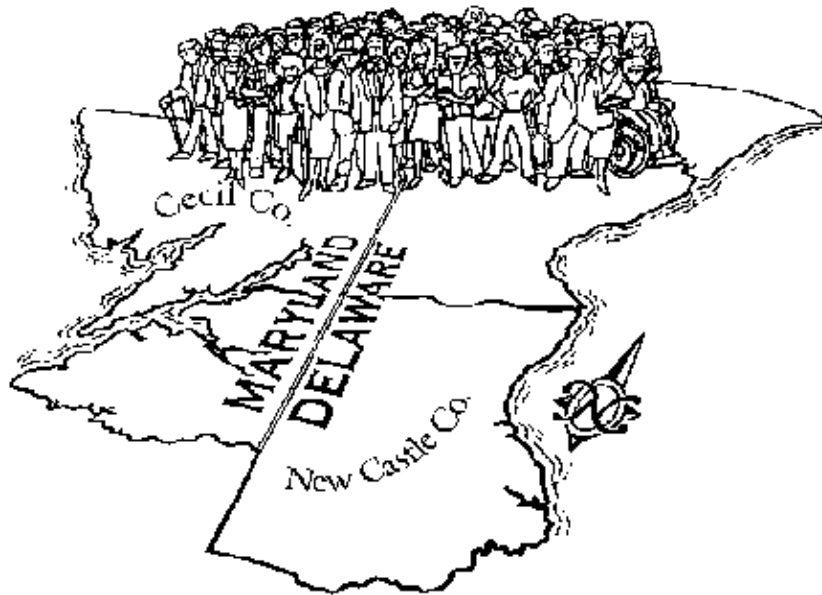


WILMAPCO

2010 Public Opinion Survey Results Summary



*Survey completed by National Research Center Inc.
Report created by WILMAPCO July 2010*

www.wilmapco.org

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WILMAPCO

About the Survey

PURPOSE

The Wilmington Area Planning Council (WILMAPCO) conducts a Public Opinion Survey annually, to understand how residents of New Castle County, Delaware and Cecil County, Maryland feel about local transportation and land use issues and the policies and strategies contained in the Regional Transportation Plan (RTP). This is the eleventh annual survey we have conducted. The survey is conducted in Cecil County every year, while in New Castle County it is conducted every four years, concurrent with RTP Updates. The survey identifies:

- Perceptions about transportation and transportation planning
- Use of public transit, bicycle and pedestrian modes
- Preferences for growth and development
- Familiarity with WILMAPCO

PROCESS

The survey was conducted through telephone interviews using randomly selected telephone numbers. Surveyors interviewed 400 New Castle County residents and 200 Cecil County residents, ages 18 years and older. Aspen Media and Market Research, a survey call center, conducted the interviews between July 12, and July 26. Each survey took approximately 20 minutes. Interview responses were imported into a dataset for analysis by National Research Center, Inc. The sample selection has a 95 percent confidence level and a sampling error of +/- 5 %. Surveyors had a response rate of approximately 11 percent.

RESULTS

The results summarize responses about satisfaction with the system, travel modes, perception of congestion, transportation and land use strategies, and 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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Transportation Remains the Region's Top Concern

Transportation

When asked what is the most critical issue facing the region, transportation remained the number one concern for both counties. In New Castle County concern for the economy increased from eight percent in 2006, to nearly 25 percent in 2010, while concern about growth and development decreased. In Cecil County the percentage of respondents choosing the economy as the most critical issue was even more dramatic, rising from three percent in 2006, to 20 percent in 2010. See Figure 1 and 1a below.

Figure 1: Most critical issues facing New Castle County

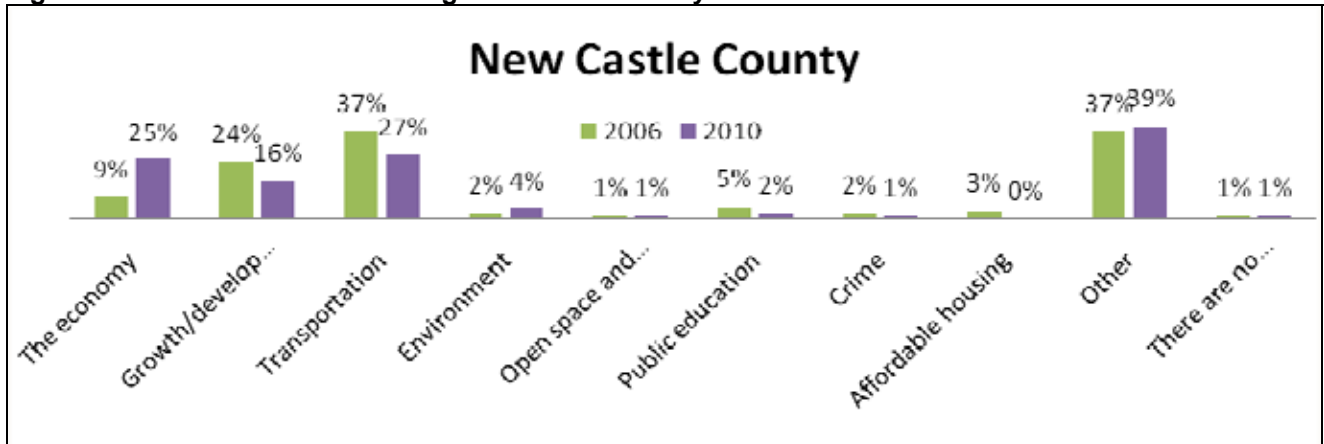
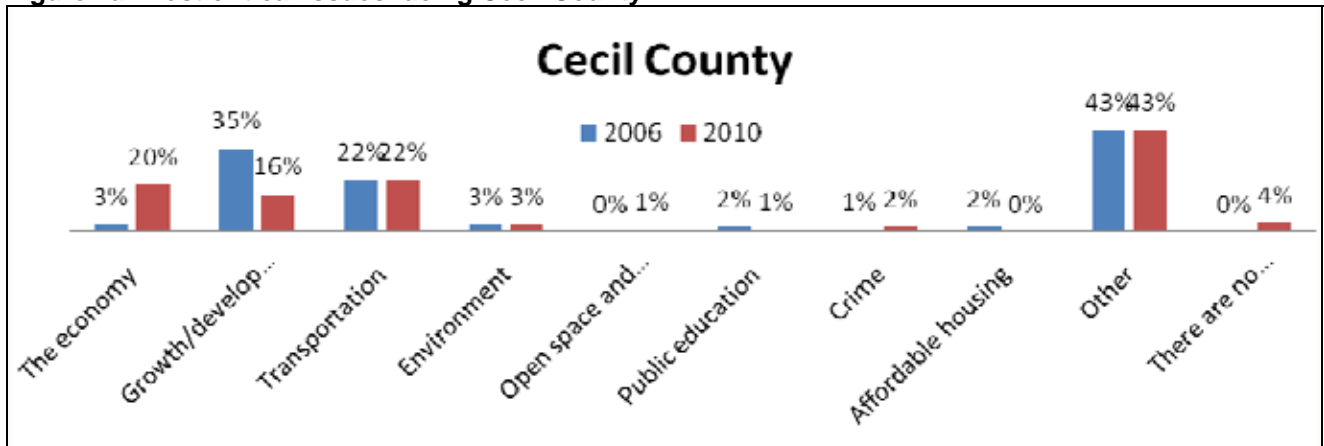


Figure 1a: Most critical issues facing Cecil County



When asked to rate if particular issues were “critical”, “important”, or “not very important,” CC and NCC respondents agreed that preserving farmland and open space (59%), cleaning up the environment (57%), and managing growth and development (53%) were critical issues. Reducing congestion (60%), improving transit (53%), and revitalizing downtowns (51%) were considered “important” issues for CC, while in NCC improving transit (51%), reducing congestion (50%), and improving bicycling facilities (49%) were the most “important” issues.

Resident Satisfaction with Transportation

Resident satisfaction with the transportation system in Cecil County has improved since 2006. The percentage rating the transportation system as meeting their needs “very well” increased from 20 percent in 2006, to 31 percent in 2010. Cecil residents stating the transportation system does not meet their needs very well also dropped from 17 percent in 2006, to 14 percent in 2010. New Castle County resident satisfaction with the transportation system, however, remained virtually the same with 22 percent stating their needs as being met “very well” in both years surveyed, and a slight decrease in the numbers stating their needs are not being met very well.

As in previous years surveyed, the majority of respondents feel that there are “very few” transportation options from which to choose. While the number of respondents stating that there are “many” options increased slightly in both counties, more than half in NCC and nearly 70 percent in CC, feel as though their options are few.

When asked what types of transportation residents would like to have more available to them overall, residents of both counties would like more access to buses (34%) and trains (29%). However, the number stating that they have access to all the transportation they need increased dramatically in both counties from 5 percent in NCC in 2006, to 35 percent in 2010, and from 7 percent in CC in 2006, to 29 percent in 2010.

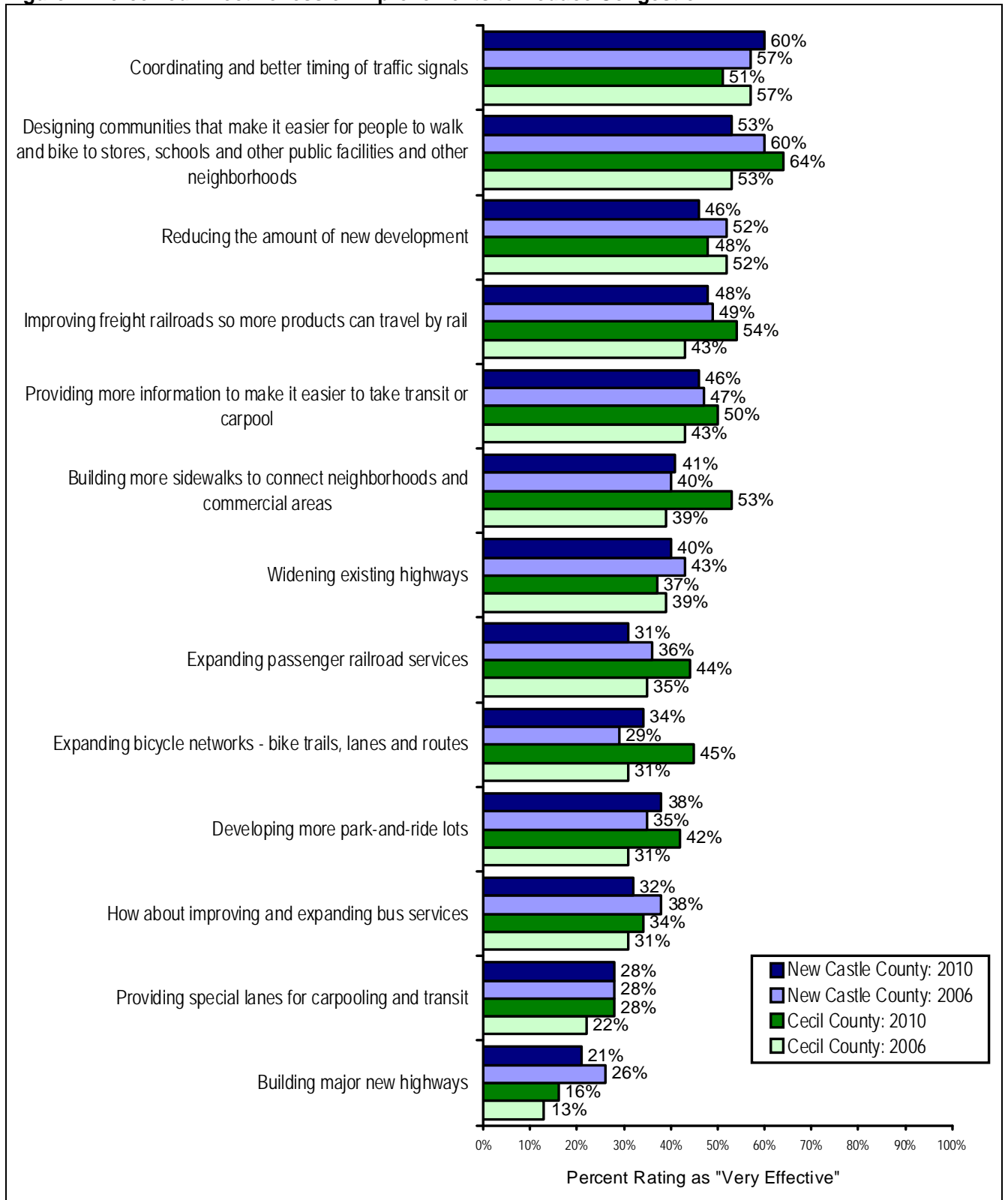
When asked what the biggest transportation issue was, in both counties, as in previous years surveyed, congestion ranked number one, and “limited access to public transportation” ranked second. Nearly a quarter of respondents chose “other” as their response. The most common answers included fuel costs, education, unemployment, pollution, and taxes.

Congestion

Resident perception of the seriousness of congestion has improved since 2006 in both counties. In NCC, 44 percent rated congestion as a “serious” problem in 2006, compared to 33 percent in 2010. In CC the percentage dropped only slightly from 18 percent in 2006, to 17 percent in 2010. Residents stating they find themselves in congestion “most of the time” during their work commutes also decreased from 50 percent in 2006, to 36 percent in 2010. When asked what respondents have done to avoid congestion, the majority in both counties reported either changing the time they leave (68%) or changing the route (65%), while the number walking or taking a bus to avoid congestion slightly decreased in both counties.

When asked about the effectiveness of improvements to reduce congestion in CC, building more sidewalks ranked a “very effective improvement” by 53 percent of respondents, with coordination of traffic signals (51%), and proving more information to make transit easier to use (50%) are also very effective improvements. In NCC, 60 percent rated improving traffic signals as “very effective”, with 46 percent rating proving more information about using transit, and 41 percent rate improving sidewalks as “very effective” measures. Overall, 48 percent felt that building new highways was the least effective measure. See Figure 2 on the next page.

Figure 2: Perceived Effectiveness of Improvements to Reduce Congestion



Public Transportation

As in previous years surveyed, when asked the type of public transportation used in the past year, the majority of respondents in both counties have not used any. The number of CC respondents using no public transportation decreased significantly from 88 percent in 2009, to 66 percent in 2010, and the number of CC respondents using Amtrak increased from 1 percent in 2009, to 11 percent in 2010. The number of CC respondents using either Dart Bus or The Bus also increased from 4 percent in 2009, to 14 percent in 2010.

When asked about the purpose of the trips made using public transportation, the majority of NCC respondents reported using public transit to get to work (43%), while in CC, 49 percent reported using public transit for recreational purposes, which is a 12 percent increase from 2006. CC also experienced an increase in those using public transit for school (12% increase), shopping (7% increase), and personal appointment (10% increase from 2006). See Table 1 below.

Table 1: Type of public transportation used

What type of public transportation have you taken in the past year?*	Cecil County		New Castle County		Overall	
	2006	2010	2006	2010	2006	2010
Work	19%	13%	41%	43%	39%	39%
School	4%	16%	3%	6%	3%	7%
Shopping	7%	14%	16%	16%	15%	15%
Personal appointment	18%	28%	10%	22%	11%	23%
Visiting	17%	21%	12%	14%	13%	15%
Recreational/entertainment	33%	49%	23%	33%	23%	35%
Other	18%	6%	21%	7%	21%	6%

Transportation Planning

Overall, respondents felt that there has not been enough planning between development and transportation, although the proportion that feel there has not been enough planning has declined somewhat from 2006 (79%) to 2010 (73%).

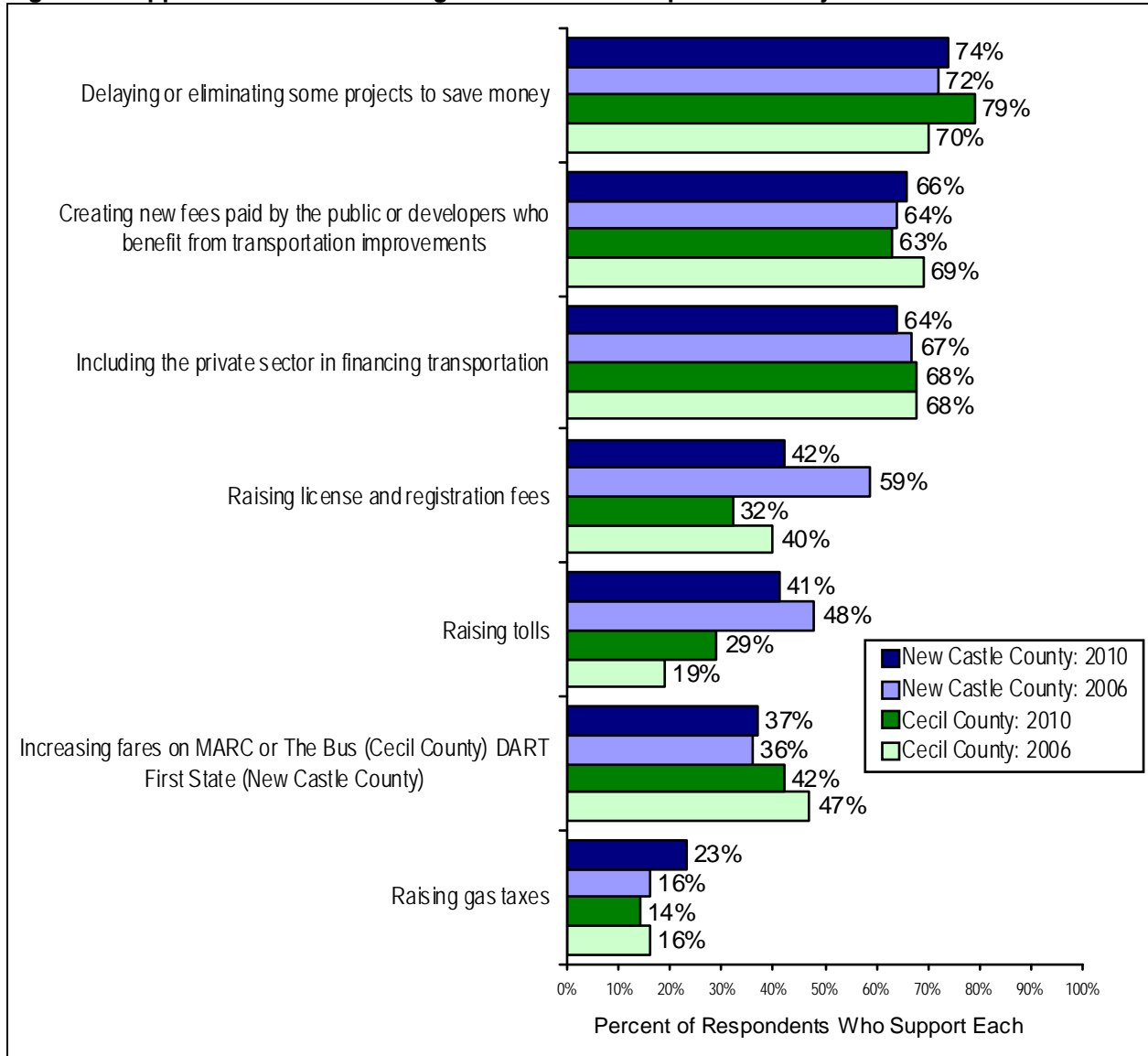
When presented with three statements about the transportation system in their county, only 9% felt that the transportation system “is basically as good as it needs to be in order to maintain economic growth.” Among those who felt changes were needed, about half thought minor changes and investments were needed, and half felt major changes and investments were needed. A smaller proportion of respondents in 2010 felt major changes were needed (44%) compared to 2006 (60%).

Transportation Funding

Those participating in the Public Opinion Survey were asked whether they supported various ways to close the gap between the funds available and the funds needed to pay for transportation projects. More than 60 percent of respondents from both counties supported including the private sector in financing transportation, creating new fees paid by the public or developers who benefit from transportation improvements, and delaying or eliminating some projects to save money (see

Figure 3 below). Support for raising gas taxes increased in New Castle County from 16% in 2006, to 23% in 2010, still far below a majority. Support decreased in New Castle County from 2006 to 2010 for raising tolls, license or registration fees, to less than half of respondents.

Figure 3: Support for Various Funding Methods for Transportation Projects



Transportation Priorities

Residents of both counties overwhelming support (65%) improving existing transportation facilities over constructing new ones in developing areas. CC respondents feel that maintaining and repairing the existing transportation system (31%) should be the highest priority and providing more transit, walking, and biking options second highest (29%). NCC respondents agree that maintaining and repairing the existing system should be the top priority (27%), but feel that using technology to improve the transportation system should also be given high priority. See Figure 4 and 4a below.

Figure 4: Funding priorities for NCC

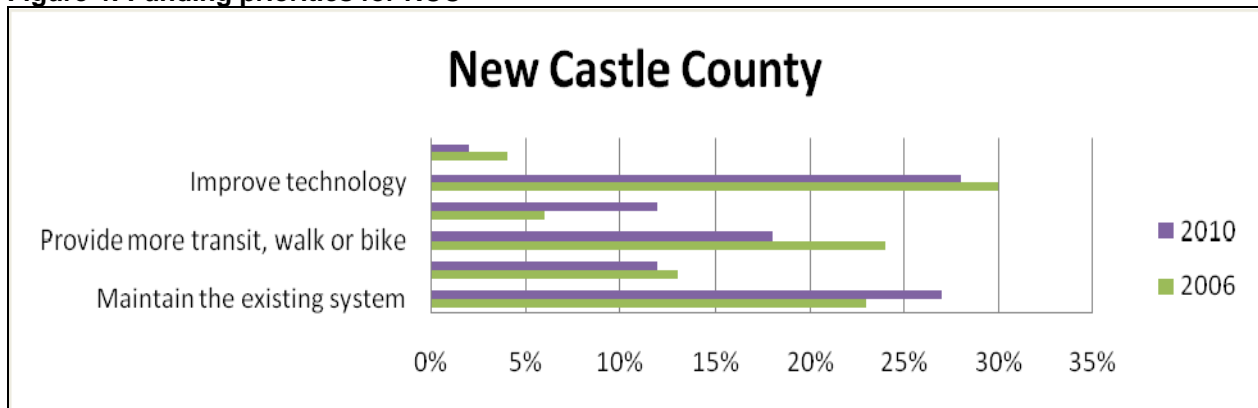
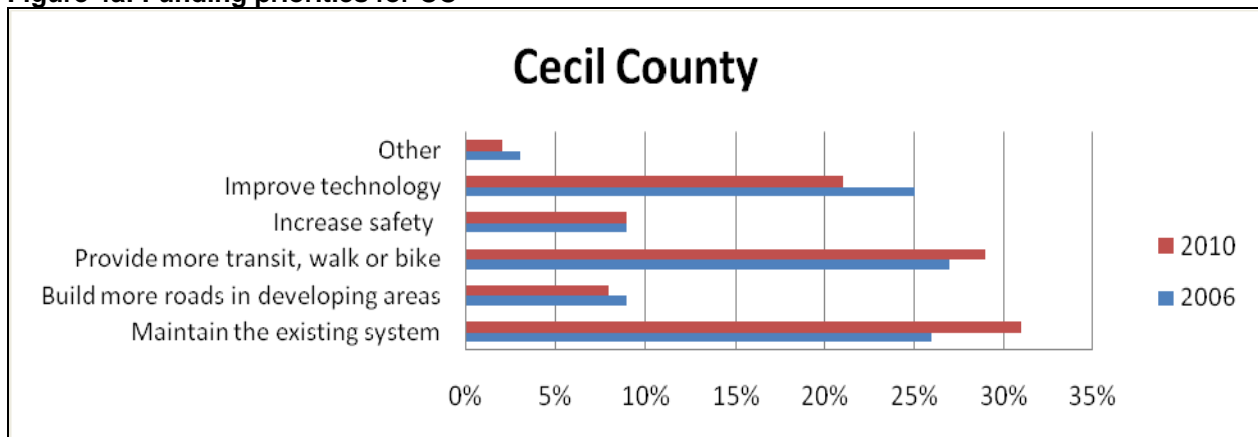


Figure 4a: Funding priorities for CC



Safety

Generally, respondents believed that the most common cause of traffic crashes was poor driving (53%) or speeding (19%). About 10% felt that congestion was the most common cause of traffic crashes, while a similar proportion believed that poor design or poor condition of roads was the most common cause of traffic crashes.

Bike and Pedestrian Facilities

The majority of respondents in CC (42%) stated that they would walk more frequently “if they felt safer with more sidewalks and crosswalks.” This percentage rose dramatically from 25 percent in 2006. NCC percentages remained similar to previous years surveyed with 46 percent stating facilities are adequate and safe, and 25 percent stating they would walk more frequently with improvements to facilities and safety. See Figure 3 on the next page.

When asked to rate bicycle facilities, 39 percent of CC respondents stated they do not ride their bikes due to lacking facilities. This represents a seven percent increase from 2006. In NCC, 41 percent of respondents stated they do not ride their bikes for reasons “other” than safe facilities. Reasons ranged from being elderly or disabled, to not owning a bike or enjoying biking, to just being too lazy to ride. See Figure 5 on the next page.

Figure 5: Use of Pedestrian Facilities

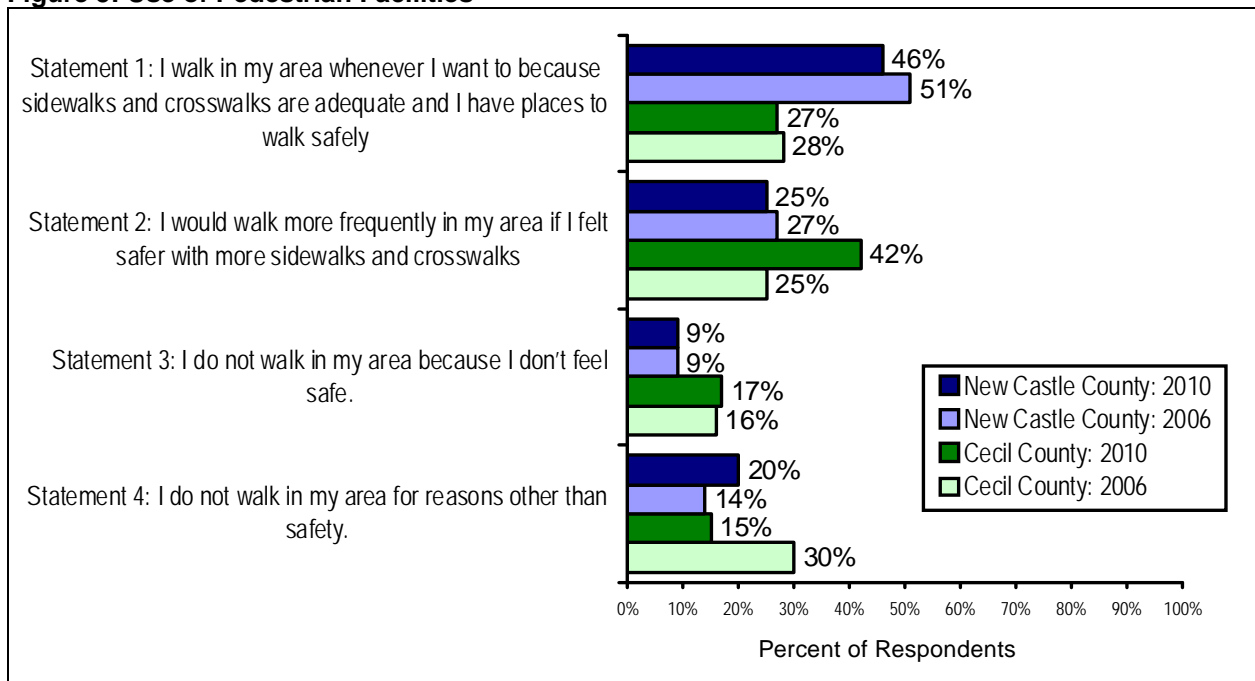
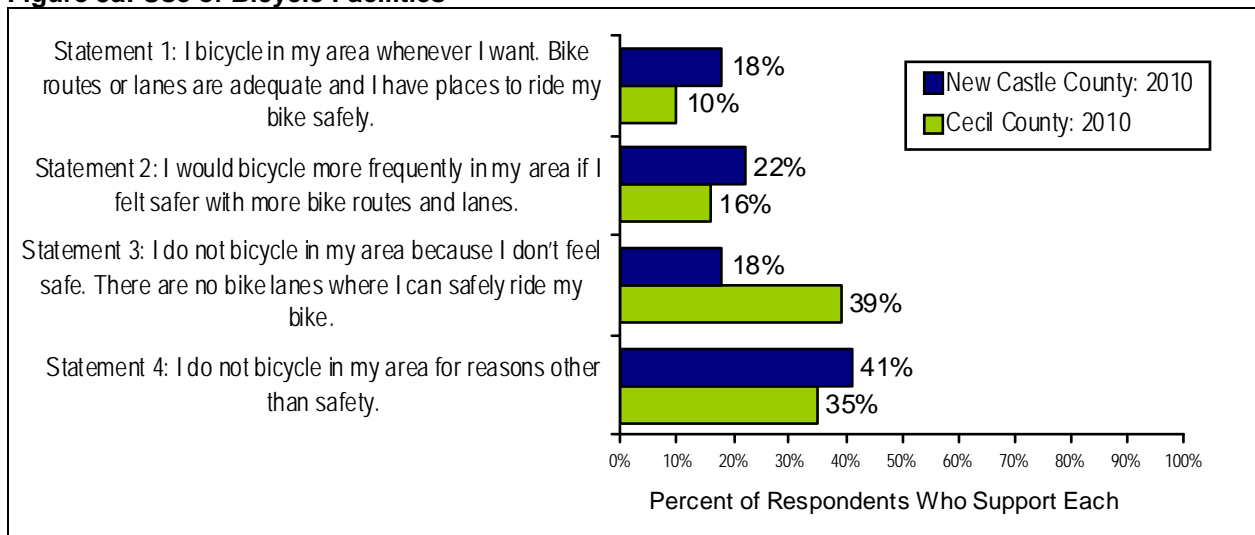


Figure 5a: Use of Bicycle Facilities



Preferences for Growth and Development

New Development

Overall, resident support for new development was split with 47 percent not wanting any and 53 percent accepting new development because it improves the economy. However, both agree (71% overall) that placement of new development should be in existing towns and in designated growth areas rather than where developers and landowners decide (29%). When respondents

were asked about their preference of living environment, 65 percent of New Castle County residents preferred suburban and 20 percent preferred rural, while 54 percent of Cecil County residents preferred rural and 38 percent preferred suburban, a slight increase from 2006.

There was agreement (46% in both counties) that “supporting farmland or open space preservation through tax incentives or subsidies to help direct development to other areas” is a good strategy to manage growth and development. As in 2006, the least support was shown from both New Castle County (15%) and Cecil County (11%) in the statement “mixing appropriate business with new residential development should be encouraged;” however, the overwhelming majority (79%) in both counties either “agreed” or “strongly agreed” that it was a good strategy.

Air Quality

When asked what they would be willing to do to improve air quality, only four percent of all respondents said they would not be willing to make any changes and five percent said that they could not make any changes. More than half said they would be willing to carpool or vanpool or to use transit, while 44 percent said they would walk or bike, and 32 percent said they would work from home. A lower proportion of respondents indicated they would be willing to take any of these particular actions in 2010 compared to 2006. See Table 3 below.

Table 3: Behaviors to Improve Air Quality

What would you be willing to do to improve air quality in our region? Would you ever...?	Cecil County		New Castle County		Overall	
	2006	2010	2006	2010	2006	2010
Carpool or vanpool	65%	62%	65%	55%	65%	57%
Take transit	57%	51%	63%	51%	62%	51%
Walk or bike	55%	49%	59%	43%	58%	44%
Work from home	53%	39%	50%	31%	51%	32%
I would not be willing to make any changes	9%	4%	6%	5%	6%	4%
I CANNOT make any changes	1%	8%	2%	5%	2%	5%

About 6 in 10 respondents (59%) had heard of Ozone Action days, while about half (31%) had heard of PM (particulate matter) 2.5. The proportion in New Castle County who had heard of PM 2.5 increased slightly from 2006 to 2010, from 26 percent to 32 percent, and 20 percent of NCC respondents had heard of the Air Quality Partnership of Delaware.

Familiarity with WILMAPCO

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Finally, we asked residents how familiar they were with WILMAPCO and 66 percent were not familiar, which is similar to previous years surveyed. When asked interest in receiving more information from WILMAPCO, such as newsletter or public meeting announcements, the results

indicated that interest has been declining for the past few years, with 65 percent stating they would not be interested in either, an increase of 16 percent from 2006.

Who we surveyed

DEMOGRAPHICS

This survey group consisted of 47 percent male and 53 percent female participants. The majority of whom are white (75% in New Castle and 93% in Cecil). In CC, 72 percent reported having some college, a bachelors or graduate degree, and in NCC, 77 percent reported having some college or above. Overall, the majority of residents (44%) were age 44-54 years of age, followed closely by the 25-34 age bracket (20%). Respondents mostly live in two-person households (27%) and own two cars (48%). The majority has also lived in the area for 21+ years or all of their lives (54%).