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Transportation Issues in Central Florida:
A Survey of Public Opinion 2015

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Executive Summary

The Central Florida transportation system has evolved considerably in the past decade and public thinking about transportation systems has shown some corresponding changes. While opinions about the importance of transportation issues and the need to address them remain mostly constant, opinions about how best to address these issues have changed. There is also an unmistakable sense of urgency reflected in the overall results, a sense that things are not only bad but getting worse.

The research in the present survey explores public opinion and knowledge of issues important to the MetroPlan Orlando Board. The results provide a snapshot of current opinions, as well as comparisons to previous research completed over the past decade.

The 2015 survey is the sixth in a series commissioned by MetroPlan Orlando. The current survey, "Transportation Issues in Central Florida: A Survey of Public Opinion 2015," used a complex multi-mode design, in part to test out alternatives to telephone surveys, which have become increasingly difficult and expensive as call-avoidance technologies and cell phones have proliferated. Other modes used included an internet panel survey, an intercept (in-person) survey, and a self-selected (volunteer) internet survey.

Data in the accompanying Statistical Supplement Report show that all modes give generally equivalent responses except for the volunteer internet survey. So data from all modes (but one) have been merged into a single data file called the main sample that forms the basis for this report. Sample weights were applied to the final merged data set to correct small imbalances in age, gender, and distribution of responses across the three counties. The weighted sample size was 951.

The internet version of the survey was also completed by 455 volunteer respondents who found the survey link on the MetroPlan Orlando website and on other websites devoted to local government or transportation issues. The main sample is statistically representative of adult residents of Orange, Seminole and Osceola counties. The "internet volunteer" sample reflects the views and opinions of what might be called the "transportation-aware" segment of the population. Comparisons between these two populations are important because the transportation-aware population is the one most likely to attend public meetings and voice strong opinions on transportation issues. It's important for policy-makers to be aware of the differences in outlook and opinion between the transportation-aware and the public at large. The two data sets are therefore analyzed separately in the report.

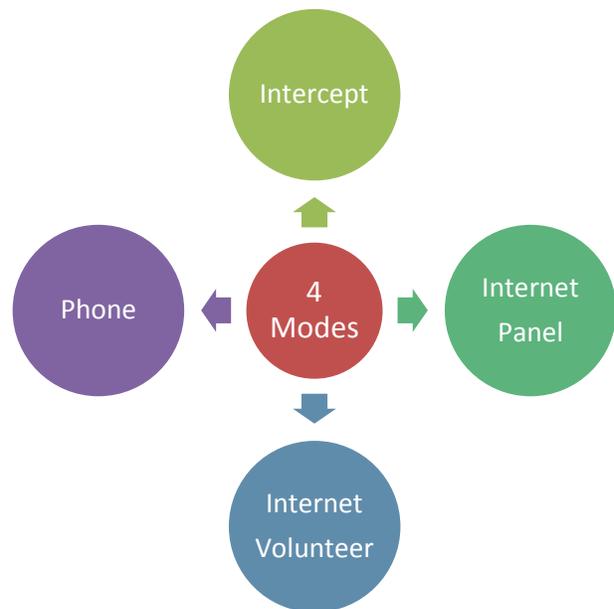


Figure 1: Modes of Data Collection for 2015

Key Survey Results



Most Central Floridians feel that not enough is being done to address transportation issues and that too little is being spent - resulting in an overall impression that the transportation system does not adequately serve the needs of residents and visitors.

As in past years, Central Florida residents feel that too little is being done to improve regional transportation. A majority (71%) still feel that too little is being spent to solve transportation issues and disagree (62%) that what is being done now to solve transportation issues is adequate. A more general question about the adequacy of the overall system found that 24% of respondents said they found the system to be “great” or “pretty good.” The remainder (77%) rated the system as average, poor or failing. A huge majority of 84% agrees or strongly agrees that “improving Central Florida’s transportation system means increased funding,” similar to results from previous surveys.

Central Floridians are beginning to use more alternatives to driving.

Driving has long been the principal means of transportation in Central Florida and remains so today. The 2015 survey asked what types of transportation people use to get around. We also asked about occasional use of different modes to learn more about the respondents’ experiences with various modes. Nearly everyone (96%) drives at least occasionally to get where they need to go. But more and more, people seem to be using other modes - walking (68%), biking (44%), taking the LYNX bus (26%) or using SunRail (35%) - for at least a share of their transportation needs. To the extent there is comparable data from earlier years, the overall use of alternatives to cars has grown.

Public transportation is growing in popularity.

When asked how we should plan the transportation system over the next 20 years, 56% of respondents emphasized expansion of bus and rail options and 23% endorsed more active transportation options like biking and walking. In contrast, widening current roads and building new roads were mentioned by only 12% and 10% respectively. In the public mind, the transportation system as a whole needs to evolve away from reliance on automobiles and toward public and active transportation modes. There is now a near-unanimous consensus (93% agreement) that “Central Florida needs a more balanced transportation system - including increased transit options like trains and more buses.” But there is also general agreement that within the current system, driving is by far the most convenient mode of transportation, and 36% of respondents also rated driving the most enjoyable.



Safety is a vital factor in transportation planning, but other things are important to the public too.

A series of questions new to the 2015 survey outlined several factors considered in transportation planning. Respondents were asked to rank the importance of each factor, given that each factor was important to some degree. The options were:

- A transportation system that provides for the needs of all users including drivers, bus riders, rail riders, pedestrians and bicyclists;
- A system that reduces the frequency of crashes and resulting injuries and fatalities;
- A system that supports the region's economy by providing access to jobs, shopping, schools, government buildings, parks and other areas of interest; or
- A system that improves air quality by reducing the number of miles that people drive.

All four of these planning objectives enjoyed considerable support, so mean rankings - average scores where 1 is most important and 4 is least - were used to examine relative importance. An analysis of the mean rankings shows that in the public mind, safety should be the top priority (mean rank = 1.96), followed by a system that adequately addresses the needs of all users (2.11), one that promotes environmental values (2.84), and in last place, a system to drive the economy forward (3.01).

A separate question showed similar results. Respondents were asked, "When planning how the transportation system will evolve over the next 20 years, what should we put the most emphasis on?" The top choice was expanding bus and rail options (56%), followed by measures to encourage walking and biking (23%). Road widening and road building were only endorsed by 12% and 10% respectively. A large majority (86%) also felt that health impacts such as air quality, obesity and stress should be considered as an element of transportation planning.

Bicycling and walking need more emphasis - particularly when it comes to safety.

A growing number of respondents walk and bike, mostly for exercise and recreation, but in many cases to get to and from work, shopping and other activities. Whatever their personal experiences with these more active forms of transportation, a huge majority (92%) feel that provisions for biking and walking are very important (64%) or somewhat important (28%) elements in the overall transportation system. Large majorities also feel that as things now stand, bicycling and walking are not safe transportation options for most people most of the time.



People have misconceptions about transportation funding.

Few in the general population (24%), understand that currently the primary method of paying for transportation projects is the gasoline tax. That, however, is an increase over the 2013 result, which was only 17%. In 2015, the two most popular options to fund transportation are to increase the gasoline tax (57% endorsement) and increase the sales tax (51% endorsement), followed at some distance by increasing the number of toll roads (42%) and increasing property taxes (35%). **The majority endorsement of increased gasoline tax and increased sales tax is a major shift in public opinion.** A new question in 2015 asked whether toll revenues should be used "to help pay for public transportation like bus and rail" - and a majority of 79% felt that they should. On the other hand, a Vehicle Miles Traveled (VMT) fee was supported by only 35%.

People have specific ideas about whom they can trust and whom they can't trust - and public officials fare poorly in this respect.

Questions about trust in various groups and institutions showed that, as in prior years, co-religionists, co-workers and the police are the most trusted, and elected officials at all levels are the least trusted. But unlike in years past, trust in public officials did not strongly predict respondents' transportation funding preferences.

Transportation Issues in Central Florida: A Survey of Public Opinion 2015

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Introduction

This report explores public opinion and knowledge of issues important to the MetroPlan Orlando Board and to the transportation planning and policy-making communities. The results provide a snapshot of current opinions as well as comparisons to results from previous years. The report highlights overall results and significant differences observed across Orange, Osceola and Seminole counties. These are generally small and few in number, as people in all three counties tend to share similar views. Comparisons are also drawn, where appropriate, between the general public and what we have characterized as the “transportation-aware” population. Finally, in cases where large differences between various socio-demographic categories are observed, they too are reported.

The 2015 survey is the sixth in a series commissioned by MetroPlan Orlando that now stretches back more than a decade. The previous five surveys were: (1) a survey completed in 2001 by Dr. Evan Berman at UCF’s Department of Public Administration, (2) a partial replication of the Berman survey in 2005 done by the UCF Institute of Social and Behavioral Sciences (ISBS), (3) a 2009 ISBS public opinion survey, (4) a 2011 ISBS public opinion survey, and (5) a 2013 ISBS survey. This report examines 2015 survey results and discusses significant changes since 2013 and long-term changes in public opinion trends.

Prior surveys confirm the importance of transportation issues to the general public. In 2013, more than 90% of all respondents described transportation issues as very or somewhat important to them, their families, and the region as a whole. Consensus on the point is so widespread that the question was deleted from the 2015 survey, along with a number of others.

MetroPlan Orlando monitors transportation opinions and concerns for the Central Florida region as part of its overall commitment to citizen involvement. This report provides results and analysis of the most recently commissioned survey, done throughout May and June 2015. Because of growing problems in the implementation of telephone surveys, the 2015 survey was a complex multi-modal survey, as described later in the report. Mode differences in the results were modest but are reported in a separate Statistical Supplement Report. All data reported here are based on the merged telephone, internet panel and intercept survey data. This report discusses data on how Central Floridians get around now, which areas of the overall system need to be addressed most urgently, and opinions about how to fund transportation.

Survey Methodology

Unlike its predecessors (2005, 2009, 2011, and 2013), “Transportation Issues in Central Florida: a Survey of Public Opinion 2015” was designed and implemented with an innovative methodology using an intercept sample involving face-to-face iPad surveying in the community, an internet panel involving a pre-screened group of respondents willing to take surveys online but chosen from a true probability sample, and the customary computer-assisted telephone interviews, along with volunteers recruited via the MetroPlan website and other transportation-related websites in the region. Thus, the sample labeled “merged” consists of 1) phone respondents (a probability sample), 2) intercept respondents (a convenience sample), and 3) internet panel respondents (also a probability sample). The sample labeled “volunteer” consists of MetroPlan Orlando website respondents. The merged sample closely replicates the demographic characteristics of the region and is considered to be statistically representative of the general population of the three-county region (Orange, Seminole and Osceola), while the volunteer sample is a self-selected group of persons who, given how they were recruited, are assumed to be more knowledgeable about and interested in transportation issues than the general public. Thus, we refer to them throughout as the “transportation-aware” segment of the population.

The intercept surveying efforts took place in public locations in the Central Florida community in Orange, Osceola, and Seminole counties. Locations were approved tax collectors’ offices and farmer’s markets. The internet panel selected respondents to voluntarily participate in the survey only if living in Orange, Osceola, and Seminole counties. The phone interviews consisted only of phone accessible households and cell phone numbers in the tri-county region. The volunteer survey was accessible publicly on MetroPlan Orlando’s website and on other local government and transportation organization websites, but only allowed participants to carry on with the survey when they confirmed living in the sampling frame counties. The volunteer survey also tracked respondents’ IP addresses to avoid repetitive participation.

The total sample reached 1,406: 108 telephone surveys, 460 panel surveys, 383 intercept surveys, and 455 volunteer surveys. For the merged sample (N = 951), the margin of survey error is ± 3.18 percentage points.

Merged Sample

Post-survey weights were applied to the general population data to correct small age, gender and county imbalances. A technical discussion of weighting appears in the Statistical Supplement Report. **All reported results from the merged survey are based on the weighted data.** Each mode was initially weighted separately and it was determined that unweighted and weighted responses were similar enough to combine into a single merged data set. The volunteer sample is not weighted since those respondents are a self-selected sample.

Several questions were added to the 2015 version of the survey. The survey questionnaire evolved through multiple revisions, each pre-tested for length, comprehensibility, and other features. The final version was then transformed into computer-assisted telephone interviewing (CATI) script and installed on UCF ISBS computers. Interviews were conducted between May 6 and June 21, 2015.

Table 1:
Merged Sample across Counties Compared with Population Figures

**Columns may not add up to exactly 100% due to rounding*

County	Percent of Total Population	Percent of 2015 Survey Merged Sample
Orange	63%	63%
Osceola	15%	15%
Seminole	22%	23%
TOTAL	100%	101%

Telephone Sample

A sample of phone numbers for the tri-county area was purchased from Survey Sampling, Inc., a nationally-known sampling firm. The sample list included 4,173 total phone numbers. The numbers were proportional to the percent of residents in each county, as well as the percent of landline versus cell phone only households.

Consequently, we obtained 1,768 landline numbers and 2,405 cell phone numbers in our sample. The sample reached 131 respondents, but 23 respondents did not meet age requirements or opted out of the survey very early on.

All interviewers were prescreened for their telephone interviewing skills and then thoroughly trained in an hour-long session, including two practice interviews. Surveys were conducted between 8:00 AM and 8:00 PM Monday through Friday, and 9:00 AM to 6:00 PM Saturday and Sunday. Any respondent who requested to be called back in Spanish was called back by an interviewer fluent in Spanish. Phone surveying ended on June 21, 2015.

Intercept Sample

All interviewers were selected based on their telephone interviewing skills and then specifically trained for intercept face-to-face surveying using iPads and Qualtrics, the survey software offline application. Interviewers received separate intercept training that consisted of a one-hour session with two practice interviews. Several potential locations for surveying were offered up by MetroPlan Orlando, including farmer's markets and tax collector's offices. Table 2 shows the locations and times of surveying for this mode. Please note that the Seminole County Tax Collector's office did not permit surveying, so locations in that county were limited to farmer's markets for consistency across counties. Spanish-speaking participants had the option of taking the survey in Spanish with a Spanish speaking interviewer when available. During the intercept surveying, 431 respondents agreed to participate, but 48 weren't able to meet the requirements to complete the survey or opted out very early on. The intercept surveying efforts ended on June 5, 2015.

*Table 2:
Intercept Surveying Details for 2015*

	Location Type	Time	Date
Orange	Farmer's Market	10am-4pm	May 17th
	Tax Collector's Office	10am-4pm	May 21 st
	Farmer's Market	10am-4pm	May 24 th
	Tax Collector's Office	10am-4pm	May 30 th
Osceola	Tax Collector's Office	9am-4pm	May 15 th
	Tax Collector's Office	9am-4pm	May 18 th
	Tax Collector's Office	9am-4pm	May 22 nd
Seminole	Farmer's Market	9am-1:30pm	May 23 rd
	Farmer's Market	9am-2:00pm	May 30 th
	Farmer's Market	9am-2pm	June 5 th

Online Survey- Panel and Volunteer Samples

The online survey was identical in content to the telephone survey for both the panel and volunteer modes. The online software Qualtrics was used to create and field the online survey. A link to the survey was sent to MetroPlan Orlando, which assumed responsibility for marketing the survey. The volunteer internet survey was open and available until June 1, 2015.

The internet panel survey obtained through Survey Sampling, Inc. (a firm that supplies all of the samples for UCF ISBS surveys) was administered within a few days and was completed on May 11, 2015. Internet panels are probability samples of households with internet access who are located via large telephone surveys then repeatedly surveyed over time. Respondents are paid a small sum for each survey they take.

Without any information on the potential respondent population in any internet survey, whether an internet panel or a volunteer survey, there is no way to calculate either a response rate or a margin of error. Of the potential volunteer respondents, 130 agreed to participate, but weren't able to meet the requirements to complete the survey or opted out early on. Likewise, 41 respondents were filtered out from the 501 internet panel survey because they opted out early. Respondents were required to be a resident of Orange, Osceola or Seminole County to participate. Although the number of respondents answering each question varied, 455 volunteer respondents and 460 internet panel respondents completed the survey.

The Statistical Supplement to this report contains the following items:

- A) **Survey Questionnaires** showing the exact question wording, response options and question sequence for the telephone and internet versions of the study. Because of the severe time constraints for intercept surveys, the latter surveys were based on an abridged version of the main questionnaire.
- B) **Weighting Formula**. Includes specific calculations for weights used in the merged total marginals.
- C) **Weighted Merged Total Marginals**. This document reports the marginal results (how each question was answered) for the total merged data sets.
- D) **Weighted Merged Marginals by County**. Same as C but showing separate results for each county.
- E) **Unweighted Volunteer Marginals by County**: Appendix D shows how the sample of volunteers (the "transportation-aware") answered each question.
- F) **Weighted Intercept Marginals by County**. Identical to C except that F shows results only for the intercept survey.
- G) **Weighted Internet Panel Marginals by County**. Identical to C except that F shows results only for the Internet Panel survey.
- H) **Weighted Phone Marginals by county**. Identical to C except that F shows results only for the telephone survey.
- I) **Crosstabs from the weighted merged sample** between various transportation questions and the variables concerning, gender, age, labor force participation, college education, and government trust. These socio-demographic differences tend to be small and insignificant; larger and more significant differences are noted in the text.

Respondent Profiles

Table 3 shows basic respondent demographic information. Since the merged data were weighted for gender, age, and county, these distributions closely match true population values, as do most other survey demographics. Differences between the merged and online volunteer samples are also minor except that volunteers were more likely to be white.

Table 3:
Basic Demographics of Merged vs. Volunteer Samples
**Columns may not add up to exactly 100% due to rounding*

Characteristic	Merged Orange Co.		Merged Osceola Co.		Merged Seminole Co.		Merged Total Sample		Merged Volunteer	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
GENDER										
Male	304	51%	67	48%	109	51%	480	51%	262	58%
Female	292	49%	72	52%	107	50%	471	50%	193	42%
Total	596	100%	139	100%	216	101%	951	101%	455	100%
TIME IN FLORIDA										
2 years or less	25	6%	3	12%	4	4%	32	6%	25	6%
3-5 years	38	9%	2	8%	3	3%	43	8%	34	8%
6-10 years	60	14%	2	8%	14	13%	76	14%	64	14%
10 years or more	298	71%	19	73%	88	81%	404	73%	331	73%
Total	421	100%	26	101%	109	101%	555	101%	455	101%
EDUCATION LEVEL										
High School or less	23	5%	3	12%	10	9%	60	6%	19	4%
Some College	64	15%	6	23%	35	32%	175	18%	75	17%
College Graduate	197	46%	10	39%	40	36%	414	44%	204	45%
Post-graduate	148	34%	7	27%	25	23%	302	32%	157	35%
Total	432	100%	26	101%	110	100%	951	100%	455	101%
AGE										
18-29	116	20%	42	30%	48	22%	206	22%	79	17%
30-59	353	59%	78	56%	114	53%	545	57%	298	65%
60-100	127	21%	19	14%	54	25%	200	21%	78	17%
Total	596	100%	139	100%	216	100%	951	100%	455	99%
RACE/ETHNICITY										
White	421	71%	68	49%	164	77%	658	69%	376	83%
Black	51	9%	13	9%	15	7%	79	8%	10	2%
Hispanic	67	11%	52	38%	14	7%	135	14%	25	6%
All Other	54	9%	5	4%	21	10%	79	8%	44	10%
Total	593	100%	138	100%	214	101%	951	99%	455	101%

Survey Results

Most Central Floridians feel that not enough is being done to address transportation issues, and that too little is being spent - resulting in an overall impression that the transportation system does not adequately serve the needs of residents and visitors.

Many of our survey questions explore feelings about the regional transportation system as a whole. In general, these opinions tend to be somewhat critical of the current system, and never more so than in the current survey. Table 4 on the next page shows the basic data.

If an overarching goal of transportation policy and planning is to create a system that serves all travelers equally well (where “all travelers” includes drivers, public transportation users, walkers and bicyclists), then the local system must be scored as average at best. Fewer than 5% describe the local transportation system as “great, serving all travelers equally well,” and 20% rate the system as “pretty good, serving most travelers adequately.” The most popular response is “average: serves some” (44%), and sizable minorities rate the system as poor (27%) or failing (6%).



The public wants an improved transportation system and understands that this will require an increased financial commitment.

The assessment of the transportation-aware segment is harsher. Among 455 people surveyed in this category, only 4 participants thought the system was great and served all travelers equally well. Average, poor and failing ratings were assigned by 84% of this group. The remaining opinions summarized in Table 4 are highly consistent with the summary judgments just discussed. Most people felt that what is now being done to improve our transportation system is not adequate to successfully address our transportation problems, a sentiment shared by 62%. Likewise, governments are not spending enough on transportation - an opinion shared by 71%. And yes, a better system will require more funding, an insight shared by more than 80%. Clearly, the public wants an improved transportation system and understands that this will require an increased financial commitment.

Table 4:
General Opinions about the Central Florida Transportation System
**Columns may not add up to exactly 100% due to rounding*

How well do you think the Central Florida transportation system serves the needs of residents and visitors? Think about all types of travel, including car, bus, rail, bicycle, and pedestrian. Would you say the overall system is... ?				
	REGION	ORANGE	OSCEOLA	SEMINOLE
Great, serves all travelers equally well	4%	4%	7%	3%
Pretty good, serves most travelers adequately	20%	16%	24%	26%
Average, serves some travelers	44%	46%	43%	40%
Poor, fails to serve most travelers	27%	29%	19%	25%
Failing, no one's needs are being met	6%	5%	7%	7%
TOTAL	101%	100%	100%	101%
What is now being done to improve our transportation system is adequate to address our problems.				
	REGION	ORANGE	OSCEOLA	SEMINOLE
Agree	38%	37%	49%	37%
Disagree	62%	63%	51%	63%
TOTAL	100%	100%	100%	100%
Would you say that generally, government spends too much, too little, or about the right amount on transportation?				
	REGION	ORANGE	OSCEOLA	SEMINOLE
Too much	9%	7%	9%	15%
Too little	71%	76%	60%	65%
About right	19%	17%	31%	20%
TOTAL	99%	100%	100%	100%
Improving Central Florida's transportation system means we will have to increase funding, through taxes or fees or both.				
	REGION	ORANGE	OSCEOLA	SEMINOLE
Agree	84%	87%	77%	80%
Disagree	16%	13%	23%	20%
TOTAL	100%	100%	100%	100%

The first item listed in Table 4 is new to the 2015 survey. The other three items have all been asked before, with generally similar results. Given the major transportation improvements that have been undertaken in the past several years like SunRail and I-4 Ultimate, it is perhaps to be expected that the percentage who agree that “what is now being done to improve our transportation system is adequate to address our problems” has risen: 23% in 2009, 22% in 2011, 29% in 2013, 37% today. Though this change in opinion is moving in a favorable direction, a very sizable majority of 63% still disagrees that what is being done now is adequate. Opinions on the other Table 4 items have barely changed at all.

56% think that bus and rail need the most emphasis in the next 20 years

There are also interesting county differences shown in the results. The general pattern is that Orange County residents harbor the most negative sentiments, followed by Seminole County, then Osceola. These differences are not huge, but they are consistent across the four items shown and also match up fairly closely with each county’s level of investment in transportation. For example, Osceola officials recently enacted a mobility fee and maximized its gasoline tax options; Seminole voters recently renewed its sales tax going to transportation; Orange has the lowest sales tax in the region and has only enacted a portion of its legally allowable gas tax.

Public transportation is growing in popularity.

When asked how we should plan the transportation system over the next 20 years, 56% emphasized expansion of bus and rail options and 23% endorsed more active transportation options like biking and walking. In contrast, widening current roads and building new roads were mentioned by only 12% and 10%, respectively. (See Table 5.)



The enthusiasm for alternatives to cars was widespread across the three counties, but somewhat more so in Orange than in Seminole or Osceola, where distances to work, shopping and the like are generally longer. Among the transportation-aware internet volunteers, enthusiasm is even stronger: 66% endorsed public transportation as the priority, 26% endorsed biking and walking, and fewer than 10% endorsed either widening current roads or building new ones. Clearly, in the public mind, the transportation system as a whole needs to evolve away from reliance on automobiles and toward public and active transportation modes. There is now a near-unanimous consensus (93% agreement) that “Central Florida needs a more balanced transportation system - including increased transit options like trains and more buses.” Among the transportation-aware, the consensus reaches 95%.

There were also some interesting socio-demographic differences in the sensed need for a more balanced system. Persons with college educations and those in the labor force were significantly *more* likely to endorse this sentiment.

**Table 5:
Public Transportation**

**Columns may not add up to exactly 100% due to rounding*

When planning how the transportation system will evolve over the next 20 years, what should we put the most emphasis on?				
	REGION	ORANGE	OSCEOLA	SEMINOLE
Widening current roads	12%	9%	15%	16%
Building new roads	10%	7%	19%	11%
Expanding bus and rail	56%	58%	48%	55%
Encouraging... walking and biking	23%	26%	17%	18%
TOTAL	101%	100%	99%	100%
Central Florida needs a more balanced transportation system - including increased transit options like trains and more buses.				
	REGION	ORANGE	OSCEOLA	SEMINOLE
Agree	93%	94%	93%	89%
Disagree	7%	6%	7%	11%
TOTAL	100%	100%	100%	100%

Two follow-up questions give some sense of the rationale behind the widespread public endorsement of public transportation. A large majority (91% of all respondents) agrees that “the community has an obligation to provide public transportation for the benefit of people who cannot afford to own and operate a car, are unable to drive because of age or disability, or for those who choose not to drive.” It is worth a note that low income people are far more likely to use the bus (50%) than moderate (33%) or upper (18%) income people. For this report, definitions of income are based on the Orlando-Kissimmee-Sanford metro area’s median family income (MFI) of \$58,300, as determined by the U.S. Department of Housing and Urban Development. Low income is defined as less than 80% of the MFI, medium income is 80-120% of MFI, and high income is more than 120% of MFI.

An even larger majority (97%) agrees that “while not everyone uses public transportation, public transportation benefits everyone by providing connections to jobs, reducing congestion and promoting economic growth.” It is hard to imagine a firmer consensus on virtually any public issue.

The next section of this report discusses how Central Floridians get around now. Almost all respondents use a car at least occasionally. Follow-up questions revealed a general consensus that with the current system, driving is by far the most convenient mode of transportation, and also the most enjoyable (36%). But the support for alternatives to driving is both clear and very widespread.

Majorities exceeding 90% agree that “the community has an obligation to provide public transportation” and that “public transportation benefits everyone.”

Central Floridians are beginning to use more alternatives to driving.

Driving has long been the principal means of transportation in Central Florida and remains so today. Nearly everyone (96%) drives at least occasionally to get where they need to go. The exception is the low-income population, who are significantly less likely to drive than moderate and upper income respondents. More and more, people seem to be walking (68%), biking (44%), taking the LYNX bus (26%) or using SunRail (35%) for at least a share of their transportation needs (Table 6). To the extent there is comparable data from earlier years, the overall use of alternatives to cars has increased.

When asked how many minutes it typically takes to get from home to work, more than half (56%) reported commutes of 11-30 minutes. When it comes to trips of 10 minutes or less and 31-45 minutes, 34% of participants reported minutes within these two ranges.

Figure 2:

TYPICAL COMMUTE IN MINUTES

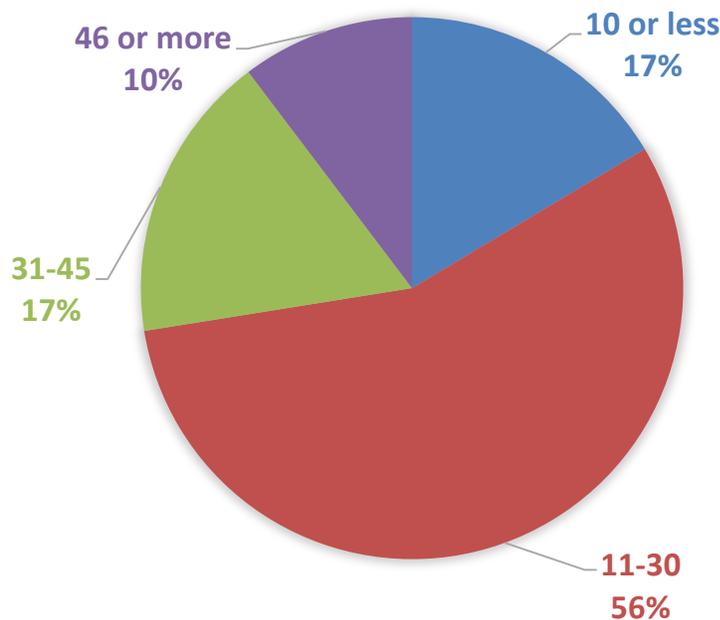


Figure 3:

TYPICAL COMMUTE IN MINUTES BY COUNTY

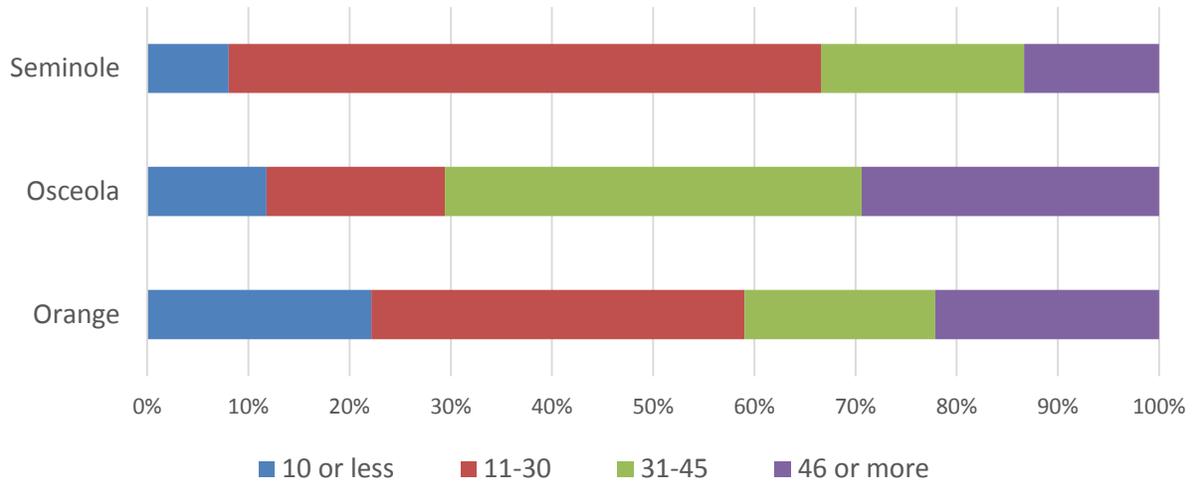


Figure 3 exhibits county differences when respondents were asked how many minutes it typically takes to get from home to work. Respondents in Orange and Seminole counties mostly reported 11-30 minute commutes, with Seminole having the most people report this (~60% compared to ~37% in Orange). Osceola differs, with commutes landing mostly within 31-45 minutes range (~ 41%) and by having the highest percentage of people reporting commutes of 46 minutes or more (~30%).

*Table 6:
Current Transportation Use*

Percent who say they ever... to get to where they need to go.				
	REGION	ORANGE	OSCEOLA	SEMINOLE
Drive	96%	95%	96%	99%
Walk	68%	72%	42%	59%
Bike	44%	47%	23%	39%
Use a LYNX bus	26%	28%	27%	18%
Use SunRail	35%	35%	19%	40%

The above question asks if respondents “ever” use a specific mode of transportation, so one-time SunRail passengers and daily passengers both can and do say YES. Still, it is notable that 35% of the respondents have been on SunRail at least once, with higher use in Orange and Seminole than in Osceola. Interestingly, Seminole County has the highest percentage of use (40%), and also the stations in the three-county area farthest from the downtown Orlando core. This makes sense, since SunRail Phase 2 to Osceola County is not yet open. Note that walking and biking are also most common in Orange, least common in Osceola, with Seminole in between.

A follow-up question asked respondents, "Of all the ways you travel, which is the MOST enjoyable?" These answers will not add up to 100% exactly due to rounding. Driving was the leading choice, chosen by 36% -- followed in order by biking (23%), walking (20%), SunRail (19%), and taking the bus (3%). As for convenience, driving was the first choice by far, chosen by 82%. No other option reached double digits.

It is of some interest that labor force participants were less likely than non-participants to choose driving as their most enjoyable transportation option and significantly more likely to rate SunRail as the most enjoyable. SunRail has emerged as a serious option to auto-commuting for people within convenient distance of a SunRail station. Labor force participants are more likely to have ridden SunRail than non-participants.

SunRail currently operates Monday through Friday to serve mainly commuters. Respondents were asked opinions on the statement, "Some people say that local governments should invest in SunRail to add regular weekend service." There is almost unanimous consensus - 95% agree with that position, most of them strongly. There is a clear call from the public to add regular SunRail weekend service.

There is a clear call from the public to add regular SunRail weekend service.



Factors in Transportation Planning

A series of questions new to the 2015 survey outlined several factors considered in transportation planning, each factor obviously important to some degree. Respondents were asked to rank the importance of each factor on a scale from 1 to 4 where 1 was most important and 4 least. Options were:

- A transportation system that provides for the needs of all users including drivers, bus riders, rail riders, pedestrians and bicyclists;
- A system that reduces the frequency of crashes and resulting injuries and fatalities;
- A system that supports the region's economy by providing access to jobs, shopping, schools, government buildings, parks and other areas of interest; or
- A system that improves air quality by reducing the number of miles that people drive.

All four of these priorities enjoyed considerable support, but an analysis of the mean rankings (Table 7) shows that in the public mind, safety should be the top priority (mean rank = 1.96; and 42% saying it is the “most important” factor). A multimodal system that adequately addresses the needs of all users is also important to Central Floridians (mean rank = 2.11; 37% saying it is the “most important” factor). This is followed by a system that promotes environmental values (mean rank = 2.84), and a system to drive the economy forward (mean rank = 3.01). A large majority (86%) also felt that health impacts such as air quality, obesity and stress should also be considered as an essential element of transportation planning.



**Table 7:
Transportation Planning Factors**

	Overall Mean Rank	Percent “Most Important”
Safety	1.96	42%
Needs of All Users	2.11	37%
Environmental	2.84	15%
Supports Economy	3.01	11%

Bicycling and walking need more emphasis.

Urban and transportation planners agree that more active modes of transportation such as biking and walking are essential elements in an overall transportation plan. These modes improve air quality, reduce congestion, lessen the demand for parking, reduce obesity and promote physical and mental well-being, among other benefits.

92% of respondents believe that adequate provisions for biking and walking are very or somewhat important

A growing number of respondents walk and bike, mostly for exercise and recreation, but in many cases to get to and from work, shopping and other activities. Whatever their personal experiences with these more active forms of transportation, a huge majority of 92% feel that provisions for biking and walking are very important (64%) or somewhat important (28%) elements in the overall transportation system. Large majorities also feel that as things now stand, biking and walking are not safe transportation options for most people most of the time.

Table 8:
Importance of Bicycling and Walking to the Transportation System
**Columns may not add up to exactly 100% due to rounding*

How important are the biking and walking pieces of the overall transportation system? Would you say these elements of the system are:				
	REGION	ORANGE	OSCEOLA	SEMINOLE
Very important	64%	68%	55%	57%
Somewhat important	28%	26%	41%	26%
Not too important	6%	4%	4%	13%
Not important at all	2%	1%	0%	4%
TOTAL	100%	99%	100%	100%

Table 9:
Bicycling Habits

How often do you personally ride a bike - either to get somewhere you need to go or for exercise or recreation?				
	REGION	ORANGE	OSCEOLA	SEMINOLE
Daily	10%	12%	8%	7%
Weekly	23%	24%	18%	24%
Monthly	13%	13%	12%	12%
Less than monthly	16%	16%	14%	17%
Never	38%	35%	49%	40%
TOTAL	100%	100%	101%	100%

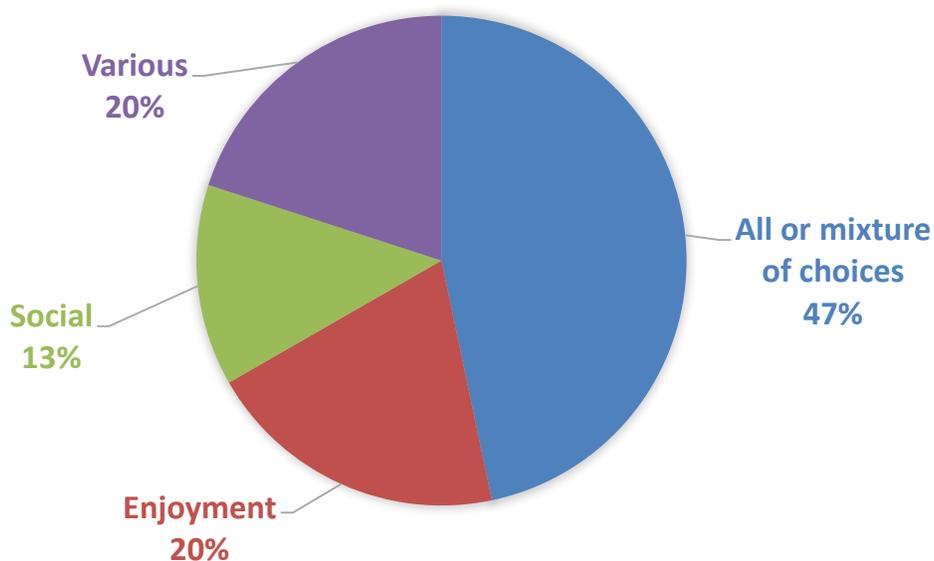
The most common reason I ride a bike is:				
	REGION	ORANGE	OSCEOLA	SEMINOLE
Commuting to work or school	8%	10%	6%	5%
Running errands or shopping	7%	9%	4%	5%
Social activity	12%	12%	14%	10%
To get exercise	53%	47%	62%	65%
To experience the outdoors	17%	18%	12%	15%
Other	3%	4%	3%	1%
TOTAL	100%	100%	101%	101%

Individuals who answered the question “what is the most common reason you bike” with “other” were asked to further explain. The following chart exhibits categories of responses. The category “various” represents statements that were not able to be combined.

Findings show that the majority of respondents stated reasons along the lines of “all or a mixture of the choices” (47%), followed by “enjoyment” derived from bike riding (20%).

Figure 4:

OTHER REASONS FOR BICYCLING



About 10% of respondents reported biking daily, and 38% of respondents never bike at all. Men ride bikes more than women. Interestingly, higher income respondents are more likely to ride bicycles than the low income population. Most (75%) of those who bike less than daily would prefer to bike more than they do.

Nearly 8% of respondents use biking to get to work. Overwhelmingly, those who bike do so for social and recreational reasons (82%) rather than pragmatic ones (15%). Still, regardless of personal use, the biking and walking pieces of the overall transportation system are very or somewhat important to nearly everybody (92%).

**Table 10:
Walking Habits**

**Columns may not add up to exactly 100% due to rounding*

How often do you make walking trips of 10 minutes or more?				
	REGION	ORANGE	OSCEOLA	SEMINOLE
Daily	46%	45%	53%	46%
Weekly	31%	33%	22%	33%
Monthly	7%	8%	4%	6%
Less than monthly	4%	4%	3%	3%
Only when I have to	6%	4%	8%	7%
Never	7%	6%	10%	6%
TOTAL	101%	100%	100%	101%

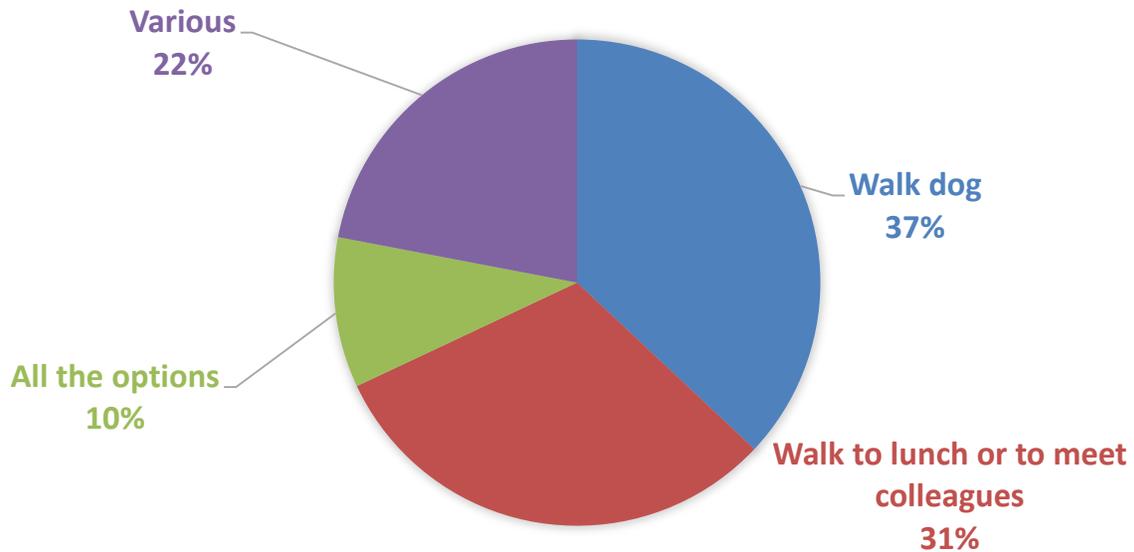
The most common reason I walk is:				
	REGION	ORANGE	OSCEOLA	SEMINOLE
Commuting to work or school	10%	10%	14%	8%
Running errands or shopping	20%	22%	19%	18%
Social activity	9%	10%	5%	10%
To get exercise	39%	37%	40%	44%
To experience the outdoors	11%	11%	10%	11%
Other	11%	11%	13%	9%
TOTAL	100%	100%	101%	100%

Again, respondents who gave some other reason for why they walk were asked to elaborate, and here too, various answers were given that did not combine into any single category (22% of all the open-ended responses).

The most common "other" reason was to walk the dog (37%) and to walk to lunch or to meet colleagues (31%).

Figure 5:

OTHER REASONS FOR WALKING



Walking trips of 10 minutes or more are the daily experience of almost half (46%) the population and at least the weekly experience of another 31%. More people walk for pragmatic reasons such as to work, school, or shop than bike for the same reasons (30% vs. 15%). As with biking, most walking is for social and recreational reasons (59% of the total).

Responses to some of the walking questions differed significantly by age. Older respondents are more likely to walk for social and recreational reasons, while younger respondents are more likely to walk to get to work or shop. Older persons were also more inclined to see walking as unsafe (see Table 11).

A large majority of respondents (82%) "want to live in an area where I can safely do more of my travel on foot." A very simple question thus arises: What discourages people from walking more often?

The survey contained a sequence of items that give us part of the answer. The questions concerned the public perception of walking and bicycling conditions in the region and they were asked partly to help determine where to focus future education and outreach efforts. Table 11 has the details.

**Table 11:
Road Conditions Faced by Area Bicyclists and Pedestrians**

Agree/Disagree Statements	Agree or Agree Strongly
Most roads in Central Florida are safe for bicyclists.	25%
Most drivers are aware of the need to share the road with bicyclists.	17%
I want to live in an area where I can safely do more of my travel by bicycle.	77%
Most roads in Central Florida are reasonably safe for pedestrians.	25%
Using crosswalks is a safe option for pedestrians crossing the street.	65%
Most drivers are aware of the need to yield to pedestrians walking in a crosswalk.	32%
I want to live in an area where I can safely do more of my travel on foot.	82%

Does the public feel that the roads are “reasonably safe” for bicyclists? Nearly 65% of respondents say no. How about pedestrians? About half (53%) again say no. Are drivers aware that they are to share the road with bicyclists? More than 80% say no. Do drivers know to yield to pedestrians in the crosswalks? About half (49%) say no. There is clearly more work to be done in educating the public on laws affecting pedestrian and bicyclist safety.

The only anomaly in Table 11 is that 65% say that crosswalks are a safe way to cross the street, and given the remainder of the data, we can only assume this means safe in a relative sense. Most people say they would prefer to live somewhere where they can safely travel on foot or by bicycle. People in the labor force are significantly more likely to express this preference than people who are not, and seniors were less likely. We assume that the need here is less for walking and bicycling infrastructure (although both would probably be welcome) and more for a driving public properly educated on the laws and common courtesies that should govern their interactions with bicyclists and pedestrians.

There is a strong consensus that respondents do not feel safe when walking and bicycling.

People have misconceptions about transportation funding.



Few in the general population (24%) understand that currently the primary method of paying for transportation projects is the gasoline tax. That, however, is an increase over the 2013 result (17%). Among college graduates, the percent is higher (26% compared to 13% of non-college graduates).

In 2015, the two most popular funding options are to increase the gasoline tax (57% endorsement) and increase sales taxes (51% endorsement), followed at some distance by increasing the number of toll roads (42%) and

increasing property taxes (35%). The majority endorsement of increased gasoline tax is a major shift in public opinion.

A new question in 2015 asked whether toll revenues should be used “to help pay for public transportation like bus and rail.” A majority of 79% felt that they should. On the other hand, a Vehicle Miles Traveled (VMT) fee was supported by only 35%.

Table 12:
Public Perception on Transportation Funding
**Columns may not add up to exactly 100% due to rounding*

Which of the following do you believe is the primary method of paying for transportation projects like new roads and highways?						
FUNDING SOURCE	2009	2011	2013 Total	2013 Volunteers	2015 Total	2015 Volunteers
Gas taxes	17%	19%	17%	27%	24%	24%
Property taxes	7%	5%	4%	3%	6%	3%
Sales taxes	10%	6%	8%	3%	6%	2%
Usage fees / tolls	28%	31%	24%	6%	15%	6%
Some combination	19%	15%	20%	52%	41%	56%
I don't know	19%	24%	28%	9%	8%	8%
TOTAL	100%	100%	101%	100%	100%	99%

The 2009, 2011, 2013 and 2015 surveys all asked Central Floridians how transportation projects are currently funded. As was the case in previous years, the answer was often inaccurate, although the knowledge base is certainly improving. The gasoline tax is the primary funding mechanism for most transportation projects. The percentage of Central Floridians who know this now stands at 24%, the all-time high and a percentage rivaling that of the “transportation-aware” population. Likewise, “I don’t know” has declined from a high of 28% in 2013 to today’s all-time low figure of 8%. The most popular option in 2015 was “some combination,” a volunteered (and essentially correct) result. Clearly, the public is more knowledgeable now than ever before about how transportation projects get funded.

All prior surveys have asked about respondents’ preferences for covering the increasingly wide gap between the needs of the transportation system and available revenue. Over the years, the most popular options have been a surcharge on rental cars and an increase in the fines levied for parking illegally in handicapped parking spaces. Since the former option consistently enjoyed overwhelming support and the latter would only raise modest amounts of funds at best, these options were removed from the 2015 survey. In 2015, the funding options we asked about were increasing the gasoline tax, increasing sales taxes, increasing property taxes, and increasing the number of toll roads. Table 13 shows the approval ratings for these options by county.

Table 13:
Transportation Funding Options

Percent who approve or strongly approve of each mechanism					
	ORANGE	OSCEOLA	SEMINOLE	REGION	VOLUNTEERS
Increase in gas tax	66%	27%	51%	57%	74%
Increase in sales tax	54%	42%	47%	51%	53%
Increase in property tax	38%	35%	30%	36%	37%
Increase in number of toll roads	42%	37%	43%	42%	39%

In 2013, only 25% approved or approved strongly of an increased gasoline tax to cover transportation costs. That number now stands at 57% - the most dramatic short-term change in public thinking since this series of surveys began. Likewise, in 2013, the proportion approving of increasing the sales tax stood at 35% and is now 51%. For the first time since we began asking these questions, a majority of residents favors both of these measures.

A majority of respondents now endorse an increase in gas tax or sales tax as a method of funding transportation – the most dramatic change documented in our surveys.

The other two options shown in the table have also experienced increased approval, but the approving fraction remains a minority. Overall, these data show increased awareness of the urgency of the transportation funding situation.

The following table gives a snapshot of how public opinion has changed over time on various funding options for transportation.

Table 14:
Public Opinion Changes on Funding Options Over Time
Columns may not add up to exactly 100% due to rounding

Percent who approve or strongly approve of each funding mechanism					
FUNDING SOURCE	2005	2009	2011	2013	2015
Increase gas tax	28%	35%	26%	25%	57%
Increase sales tax	40%	45%	46%	35%	51%
Increase property tax	N/A*	18%	20%	19%	35%
Increase number of toll roads	35%	51%	52%	45%	42%
Raise tolls on existing roads	N/A*	N/A*	N/A*	34%	N/A*
Increase tag, title, and registration fees	40%	49%	34%	36%	N/A*
Add \$2 rental car surcharge	69%	74%	80%	79%	N/A*

*N/A: Option was not offered in survey for the particular year listed.

There are large differences between counties in what funding mechanisms are approved and disapproved. Orange County residents are by far the most approving of a gas tax increase (66%), followed by Seminole (51%). Osceola residents are mostly opposed to the idea (27% approval). Osceola is also less approving of all the other funding options except increasing property taxes, where Seminole is most opposed.



What accounts for the increased popularity of the gas tax and sales tax options is not clear. Large majorities have always agreed that significant improvements in the transportation system will require increased funding. Perhaps raising the gas tax is now seen as the least disagreeable method of doing this. It is also a tax that can be avoided by driving less or purchasing more fuel-efficient vehicles. The national gas tax crisis, caused by falling gas tax revenues, has been widely discussed in the media, and that too may have played a role. Since the previous survey in 2013, the economy has certainly improved and that may make people more willing to accept a small gas tax increase. Also, the price of gasoline has fallen from about \$3.60 per gallon in 2013 to around \$2.60 in 2015, and that too might make a small increase in the price tolerable. No data are available to clearly point to the most plausible reason for the change in public opinion.

With gas tax revenues declining mostly because of the increased mileage efficiency of the fleet, some regions throughout the country are exploring a tax on Vehicle Miles Traveled (VMT) as an alternative to the gasoline tax. The rationale is that all vehicles, however efficient, use highways, and that the proper measure of their "cost" to the system is how far they drive, not how much fuel they consume in the process. Such a measure is opposed by 65% of Central Floridians in general and by 60% of the "transportation-aware" population.

People have specific ideas about whom they can trust and whom they can't trust - and public officials fare poorly in this respect.

Prior surveys explored the question of trust in public officials and institutions, and the 2015 surveys contained the same question sequence (see Table 15).

As in prior years, these questions again showed that co-religionists, co-workers and the police are the most trusted, and elected officials at all levels are the least trusted. But unlike prior surveys, trust in public officials did not strongly predict respondents' transportation funding preferences - a sharp contrast to previous surveys where the least trustful were the most likely to oppose every funding mechanism we asked about.

Table 15:
How Much Do You Trust Different Groups of People?
**Rows may not add up to exactly 100% due to rounding*

	A lot	Some	A little	Not at all
People in your neighborhood	35%	45%	16%	5%
People you work with	55%	36%	7%	1%
People at your church or place of worship	55%	32%	5%	8%
People who work in the stores where you shop	14%	48%	31%	7%
The local news media	5%	27%	40%	28%
The police in your local community	31%	43%	20%	6%
Non-profit organizations	15%	54%	24%	8%
The local business community	15%	54%	26%	5%
Local chambers of commerce	10%	42%	27%	21%
Citizen-led organizations	11%	56%	27%	6%
Leaders of local colleges and universities	20%	47%	24%	9%
Leaders of religious organizations	12%	34%	26%	28%
Local elected officials	3%	34%	37%	25%
State elected officials	1%	21%	33%	45%
Federal elected officials	1%	24%	38%	36%
Government in general	3%	32%	39%	26%

The key issue for our purposes is whether trust in media, elected officials, and government - or rather the lack of trust in these institutions - is related to various transportation issues in such a way as to create a barrier to public acceptance. This was true in 2013 but no longer true in 2015. While there were a few modest differences in funding and general transportation opinions across categories of trust in government, these differences were neither consistent in direction nor were they statistically significant.

The results show that the top two most trusted groups (those with the highest percent saying they can trust the group “a lot”) are (1) people at your church or place of worship and (2) people you work with, both with high trust scores above 50%. The next best showings are “your neighbors” at 35% and “the police in your local community,” with 31%. Trust levels drop off sharply thereafter. Elected officials, local news media, and “government in general” are clearly the least trusted people and institutions by Central Floridians, patterns also observed in national survey data.

There appears to have been a more or less across-the-board decline in trust. “A lot” of trust in “people in your neighborhood” declined by 11 percentage points between 2013 and 2015; and likewise people at your church (down 12 points), the local police (down 17 points), with smaller but still noticeable losses elsewhere.

Whether this decline is real or a result of the more complex design of the 2015 survey, we are unable to say. Interestingly, this is one of the relatively few cases where mode differences were significant. Among telephone survey respondents, 63% scored as “high” in political trust, whereas among internet panel respondents, the corresponding figure was

only 50%. The trust series of questions was not included in the intercept surveys because of time constraints with this mode. If people with access to the internet and the willingness to participate in internet panel surveys are in fact less trusting than the average telephone respondent (the mode most comparable to previous surveys), then it becomes more likely that the apparent decline is an artifact of method. Certainly, these days, it would seemingly require more trust in others to answer a telephone than to fill out an online survey.

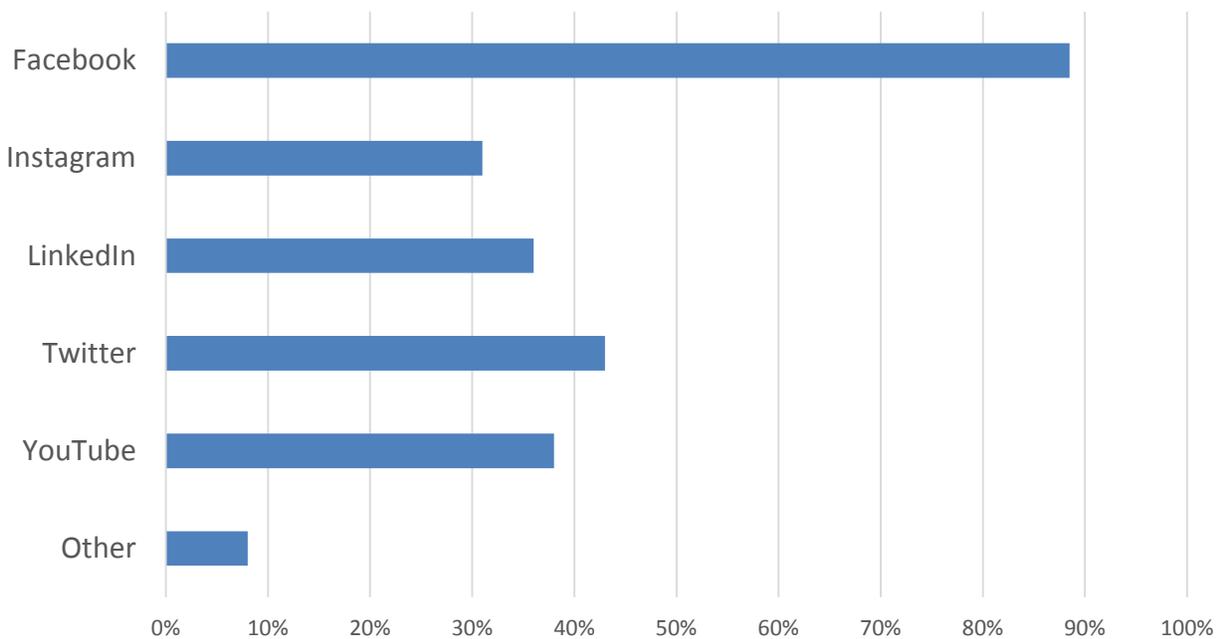
A Note on Social Media

Prior surveys asked several questions about where people get information on transportation issues, which media they trust, etc. Each administration of the survey obtained the same results: television ranked first, followed by the Internet and then newspapers. This year, for the first time, we asked about the use of social media to obtain information on community issues.

Indicative of the times, 78% of our respondents do use social media for these purposes at least occasionally. Of those who do use social media (N = 445), 88% use Facebook; 36% use LinkedIn; 31% use Instagram; 43% use Twitter; and 38% use YouTube (percentages add up to over 100% due to the option of picking more than one answer).

Figure 6:

MOST USED SOCIAL MEDIA CHANNELS



Conclusions

- No matter how we approach the question, public opinion in Central Florida strongly favors giving more attention to increasing public transportation options and less attention to building more and wider roads. No prior survey has shown this preference as clearly as the 2015 survey.
- Likewise, there is a clear public consensus that biking and walking are to be encouraged. Large majorities say they would like to live in a community where they can travel safely by bike or on foot. Equal majorities say that this is not true of the Orlando metro area at the present time.
- Funding transportation options has always been contentious, but slowly a consensus has begun to emerge that increasing the gasoline tax is probably the best way to do this, followed by increasing the sales tax. For the first time since we began asking these questions, a majority of residents favors both of these measures. Likewise, the public concurs that toll revenues should be available to improve public transportation. But the idea of a vehicle miles traveled fee is not popular with Central Floridians.
- As in all prior years, a large majority (84%) understands a better transportation system will cost money and seems willing to pay those costs.
- Central Florida residents have always felt that too little is being done to improve regional transportation. Majorities (71%) think that not enough money is being invested in transportation and more than 60% believe what is now being done is not adequate. It is little wonder that 77% say that the overall system is only average, poor or failing.

In sum, the public sees a clear need for greater investment in the regional transportation system, a system that needs to pay greater attention to public transportation and to the needs of bicyclists and pedestrians. For the first time ever, majorities support increases in both the gasoline and sales taxes for achieving these ends. Safety must always be the first concern, of course, but next to safety, the most important factor to consider in the next two decades of transportation planning should be designing a system that “provides for the needs of all users including drivers, bus riders, rail riders, pedestrians and bicyclists.”

Finally, we also received some comments from respondents with suggestions for future survey design. One Poinciana resident noted that part of his community crossed into Polk County, so we should consider not limiting survey takers to Orange, Osceola and Seminole counties. Another member of the public suggested that a free response section be added to the funding section so people could make their own suggestions about funding sources for transportation. In general, the survey results show that a mixed mode strategy is viable and, we suggest, generally preferable to the phone-only option.