

Mass Transportation in Central Indiana

Research Overview
August 2008

Conducted for:

The Greater Indianapolis Chamber of Commerce &
Metropolitan Indianapolis Board of REALTORS®

Background & Objectives

The Greater Indianapolis Chamber of Commerce (GICC) and the Metropolitan Indianapolis Board of REALTORS® (MIBOR) partnered to conduct an awareness study among voters in a nine-county region.

The objectives of this research include:

- *Exploring voters' attitudes regarding mass transportation options in the region;*
- *Assessing willingness to use mass transportation and identifying key issues that will influence usage;*
- *Determining the perceived need for public action on this issue, and the willingness among voters to support public funding for mass transportation; and*
- *Evaluating perceptions regarding the best options for funding and support of mass transportation.*

Methodology

A quantitative survey was conducted to gather this information from voters in the Central Indiana region. A total of 1,434 surveys were completed, with distribution throughout the nine-county area.

A mix of data collection via telephone surveys and on-line surveys was used to ensure a representative sample. In total, 903 surveys were completed via telephone and 531 were completed online. For the overall results, the responses were weighted to be representative of the household populations of each county. With this sample size, the accuracy of results overall is +/-2.6% at a 95% confidence interval, and between +/- 6.7% and +/-8.2% for each of the counties.

Survey participants were qualified to ensure that they lived in one of the nine counties, and had voted in a political election in the past 4 years.

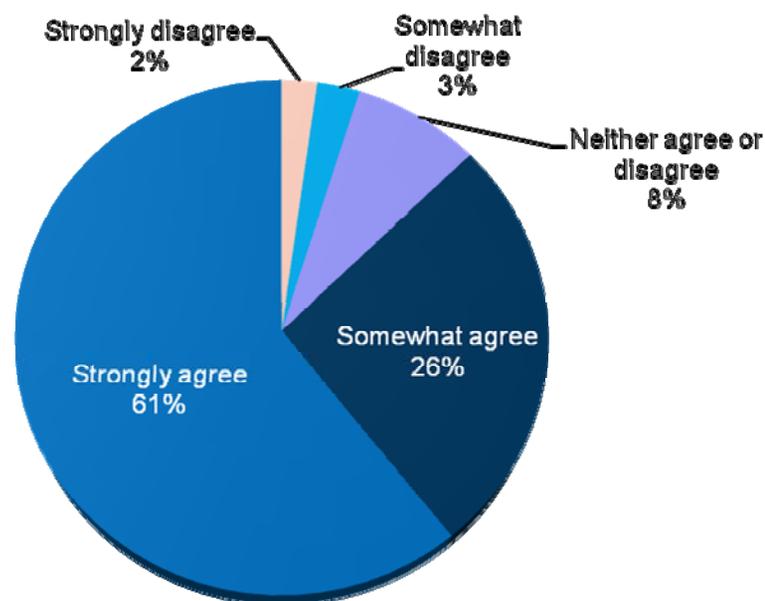
County	Surveys
Boone	144
Hamilton	157
Hancock	139
Hendricks	194
Johnson	148
Madison	153
Marion	218
Morgan	141
Shelby	140
Total	1,434

Data was collected in July and August 2008.

Assessment of Need

When asked to indicate the need for additional transportation options, more than 87% of the voters agreed that this need exists – and 60.7% strongly agreed with this statement.

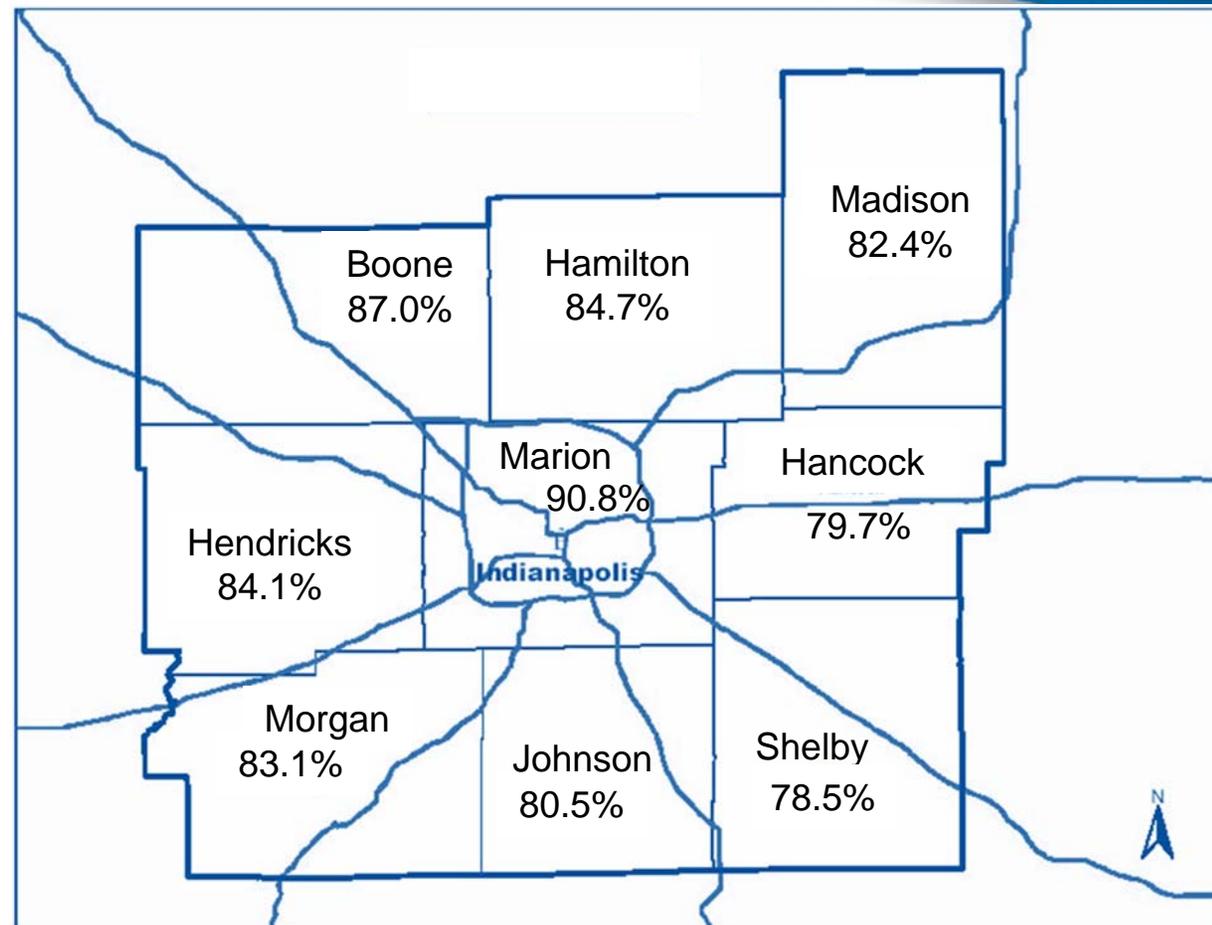
There is obviously a widespread and pervasive recognition that Central Indiana needs more mass transportation options.



How much do you agree that there is a need for additional transportation options in Central Indiana, such as some type of mass transportation? This could take the form of improved bus service, express buses, or some type of train service.

Assessment of Need by County

All counties see a need for mass transportation, as more than 78% of voters from each county agreed that there is a need.



How much do you agree that there is a need for additional transportation options in Central Indiana, such as some type of mass transportation? This could take the form of improved bus service, express buses, or some type of train service.

Transportation System Preferences

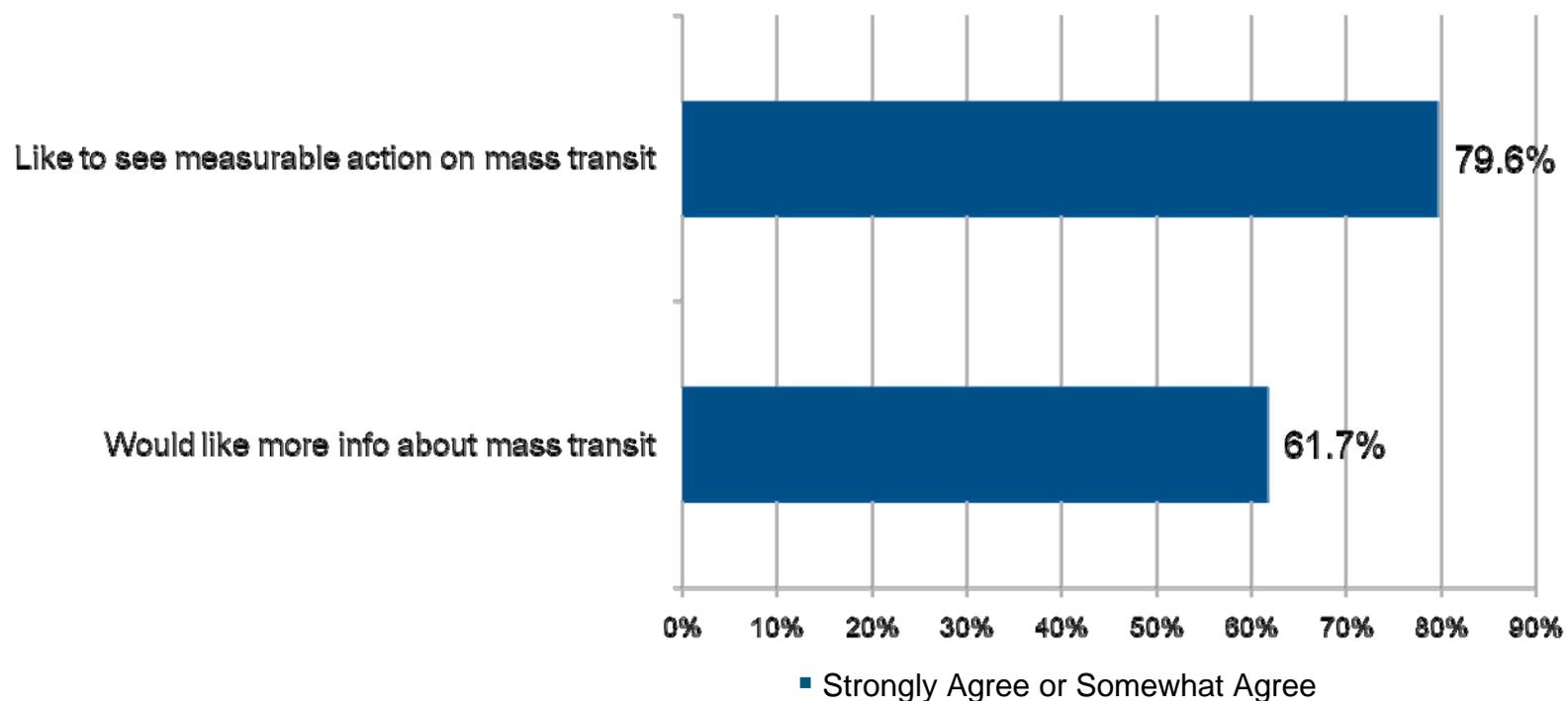
Because there are many ways to implement/improve mass transportation, it is critical to develop a plan that gives people the options that they desire. Voters were asked to indicate how important they believe it is for Central Indiana to address each of the following issues as part of an integrated transportation system. It is clear that the most important options are an improved bus system and some type of train system, but consumers want the issues addressed across the board.

Transportation Option	Percent Who Feel it is Important
Improved bus system	71.9%
Some type of train system	64.3%
Improved sidewalks	54.9%
Improved bike paths or bike lanes	50.1%
Car pooling lanes on the highways	47.3%

Assessment of Need

The majority of voters want to see both more discussion and action regarding mass transportation. They are least likely to express a desire for more information – instead they strongly want more action.

Overall, 79.6% of the voters would like to see measurable action on mass transportation.



Public Support

One of the challenges of considering this type of issue is that voters have a number of major concerns. The following table shows the percentage of voters who indicated that it was “very” or “somewhat” important for government to address each of the following issues.

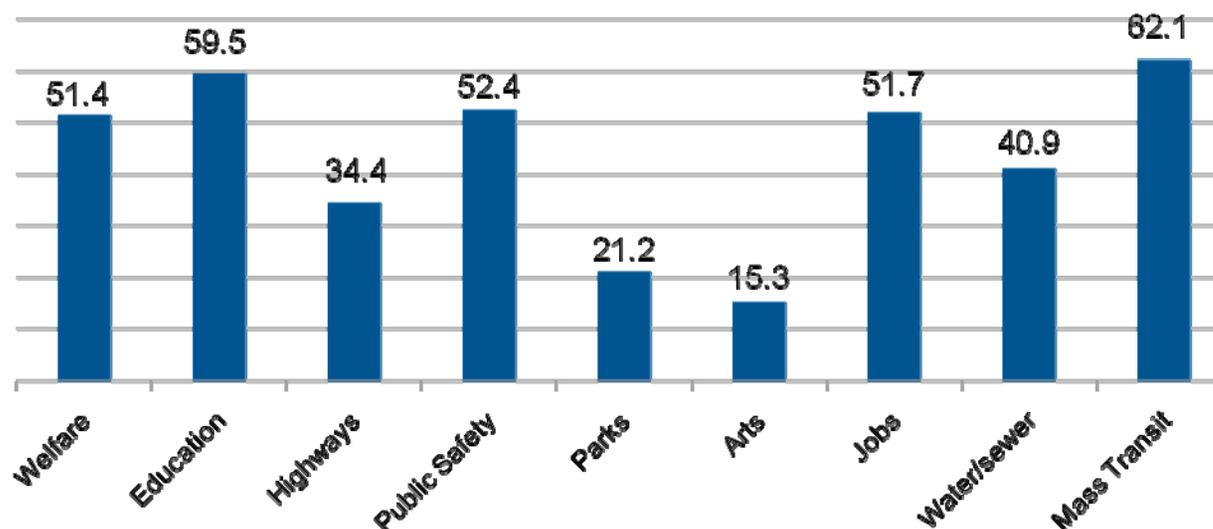
As might be expected, public safety, education, and jobs are on top of the list. There are obviously several areas that are considered more important for government. Yet this information only tells part of the story. In Central Indiana, government is actively addressing many of these issues, so it is also critical to understand perceptions regarding how voters want public monies dedicated to these options.

Issue	Importance
Public safety/law enforcement	90%
Education	86%
Job creation/economic development	84%
Water & sewer issues	75%
Child welfare services	74%
Roads & highways	71%
Transportation options such as buses, trains, or other mass transportation	68%
Parks & recreation	42%
Arts & cultural activities	30%

Need Additional Public Funding

To explore how perceptions of importance link to funding, voters were asked to indicate whether public funding for each of these areas was too little, about right or too much. While there is concern that public funding is too low in several areas, the biggest gap is seen for mass transit. Overall, 62% of the voters felt that funding was too low in this area. Therefore, while this is not seen as the most important area of concern, it is seen as the one that is most severely under-funded at this time.

% Rating Public Funding as “Too Little”

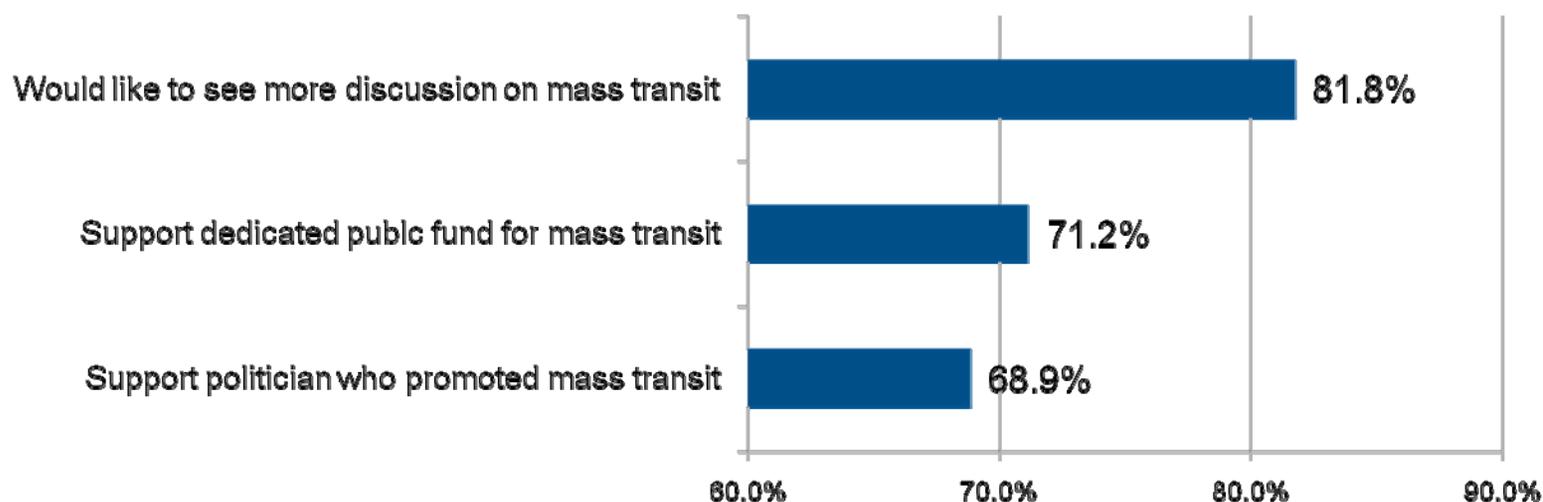


Please consider the following areas and indicate whether you feel that the current amount of public money invested in each of these is too much, too little, or just right.

Public Funding Support

A key finding from the study is that voters are willing to support public funding for mass transportation. More than 70% indicated that they support a dedicated public fund for this purpose. In addition, almost 70% indicated that they would support a politician who promoted the need for mass transportation options.

It is clear that voters are willing to put money toward this problem and see that as a reasonable public response to the perceived problems.



■ Strongly Agree or Somewhat Agree

Motivators for Perceptions of Need

The desire among voters for some action relating to mass transportation is clear. Across Central Indiana, people want to have more discussion about this issue – and see more action.

In developing the dialogue about mass transportation and the various options, it is important to understand some of the issues and concerns that are driving the perceptions of need. The survey assessed a number of issues to better understand where the areas of concern are strongest. These were presented as overall issues in the community – before the concept of mass transportation was explored.

A review of these factors will help clarify the concerns that are important to Central Indiana voters on this issue.

Transportation Cost Issues

A key issue of concern to voters relates to cost. In fact, voters indicated that the cost of gasoline is causing them to drive less, and may influence where they choose to live. This is clear from the research, as well as the fact that there is evidence that people have changed their behavior and are driving less.

In the past, consumers expressed negative reactions to increases in the cost of gasoline, but they continued to drive just as much, and to choose vehicles with little regard to gas efficiency. This is no longer the case – and that suggests that they might be willing to change their behavior as it relates to mass transportation.

Additionally, since more than half the people indicated that the cost of transportation could influence where they choose to live, this issue has even broader potential consequences to development in Central Indiana.

Cost	Strongly Agree	Somewhat Agree	Total
The cost of gasoline is a major concern	78.4%	15.0%	93.4%
The cost of gasoline is causing you to drive less	61.3%	19.4%	80.7%
The cost of transportation could influence where you choose to live	32.0%	30.1%	62.1%

Congestion Concerns

While concerns about cost are extremely widespread, many voters are also concerned about congestion. Voters feel that Central Indiana needs to address traffic and congestion problems both for key highways, as well as for major city and county roads.

Overall, more than half of the voters agreed that there are serious traffic problems in Central Indiana. While the percent that strongly agree is not as high as for the cost issues, there is still general agreement with these concerns.

Congestion	Strongly Agree	Somewhat Agree	Total
The Central Indiana area needs to address traffic and congestion problems on key highways such as I-65, I-465, and I-70	32.6%	37.4%	70.0%
The Central Indiana area needs to address traffic and congestion problems on major city and county roads	30.3%	37.3%	67.6%
There are serious traffic problems in Central Indiana	24.7%	31.5%	56.3%

Attitudes about Mass Transportation

To further explore what is motivating the interest in the development of additional mass transportation options, voters were asked to consider a number of statements about mass transportation and indicate how much they agreed with each one.

Statistical procedures were used to determine which statements are most closely related in the rating process. The process identified three key groups of ratings that relate to why voters want to pursue mass transportation:

- Access
- Traffic and air quality
- Quality of place

These issues relate closely to the overall concerns that were expressed regarding key issues in Central Indiana. But these statements help identify how much voters believe that mass transportation can help address these issues.

Access

A key perceived benefit of mass transportation is the level of access it would provide for people generally, and for the disabled and elderly. Mass transportation provides people with choice and it allows more people to get around. It also provides additional access for people to get jobs in Central Indiana. Another interesting perceived benefit is that it would provide a less stressful way to get to work.

The interesting thing about these attitudes regarding access is the strength of agreement – these are attitudes that are widely shared.

Access	Strongly Agree	Somewhat Agree	Total
Mass transportation would give people more choices.	54%	37%	92%
Mass transportation would provide mobility options for the disabled and elderly.	54%	33%	87%
Mass transportation would help employers have access to additional employees & employees have access to jobs.	49%	36%	85%
Mass transportation would provide a less stressful way to get to work	44%	37%	81%

There are a number of reasons for Central Indiana to invest in some type of mass transportation option. Please consider the following reasons for this type of investment and indicate how much you agree with each one.

Traffic & Air Quality

There is also fairly strong agreement that mass transportation would help save on transportation costs and reduce traffic problems. Additionally, there is also fairly strong recognition that it would improve air quality.

Traffic & Air Quality	Strongly Agree	Somewhat Agree	Total
Mass transportation would provide a good way for citizens to save money on gasoline and transportation costs such as car insurance, parking, & auto wear and tear.	65%	28%	92%
Mass transportation would reduce traffic problems in Central Indiana.	48%	36%	84%
Mass transportation would help improve the air quality in Central Indiana.	40%	34%	74%

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Quality of Place

The final grouping of attributes relates to how mass transportation contributes to the quality of place in Central Indiana. There is strong agreement that mass transportation is important in economic development, and that it would make Central Indiana a more attractive place to live. So there is strong agreement generally that mass transportation would have a positive impact on the area.

Quality of Place	Strongly Agree	Somewhat Agree	Total
Mass transportation is an important element of economic development in the area.	43%	38%	81%
Having mass transportation would make the Central Indiana area a more attractive place to live.	42%	36%	78%
Most major cities offer mass transportation	40%	33%	73%
Having mass transportation available would make Central Indiana a more affordable place to live.	29%	38%	67%

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Past Usage

Overall, approximately 79% of the respondents reported using mass transportation of some type, at some time. The largest group used mass transportation while traveling in another city. There were about a third who have used a car pool to commute, and a third who have used mass transportation for commuting. Slightly fewer have used IndyGo. Of course, recent usage is a better predictor of future usage, and only 43% have used mass transportation in the past year.

The positive finding is that most people have experience with mass transportation in some form, and have used it. This suggests a great deal of potential for future usage, if mass transportation options were available.

Usage	Ever	Past year
Used some type of mass transportation to get around on a leisure or business trip in another city.	59%	34%
Used a car pool to commute to work, either in Central Indiana or somewhere else.	35%	15%
Used some type of mass transportation to commute to work including bus, train, subway (either here or in another city).	32%	9%
Used the Indianapolis bus system, IndyGo..	29%	7%
Commuted to work using a bicycle or walking.	18%	8%

Conclusions

- Key findings from this research are the widespread conviction that Central Indiana needs mass transportation options and that voters are willing to support these initiatives. There is overwhelming support for mass transportation, with voters indicating that:
 - They want to see action on this issue.
 - They are willing to support politicians who promote the need for mass transportation.
 - They are willing to support increased dedicated funding for this purpose.
 - Support is strong across the nine-county region.
- Voters also feel that mass transportation is currently under-funded in Central Indiana. While voters see several other issues that are more critical, mass transportation is where there is the biggest gap in funding.
- In terms of positive reasons to pursue mass transportation, it can provide cost savings and choice for a diverse audience. Voters see benefits in mass transportation for everyone from the elderly and disabled to local businesses. They are also concerned about current transportation costs, as well as congestion.
 - In addition to supporting mass transportation with public funding, it will also be important for people to use the system. Overall most have some experience with mass transportation (79% have ever used), with 43% indicating some type of mass transportation usage in the past year.