

2013/2014 MAG Transportation Survey Topline Results



TPC
January 29, 2014
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MAG Transportation Survey Timeline

Questionnaire Development Phase

- Regional Council: October 23rd
- Online discussion bulletin boards: Early November
- Stakeholder Meeting: November 20th

Quantitative Data Collection/Analysis Phase

- Finalized survey instrument: November 26th
- Data Collection: December 4th to December 31st
- Top line: Second week of January 2014
- Full report: End - January 2014

Sample – MAG Region High Efficacy Voters

- High efficacy voter = voted at least three times in the last five elections (every two years, does not include local elections).
- Voters between the ages of 18 to 24 were required to have voted at least once.
- As a result of specifically targeting high efficacy voters, the demographic makeup of the sample skews *1) older in age and 2) Caucasian*, compared to a representative sample of all residents in the region or registered voters.



Demographics and Respondent Background

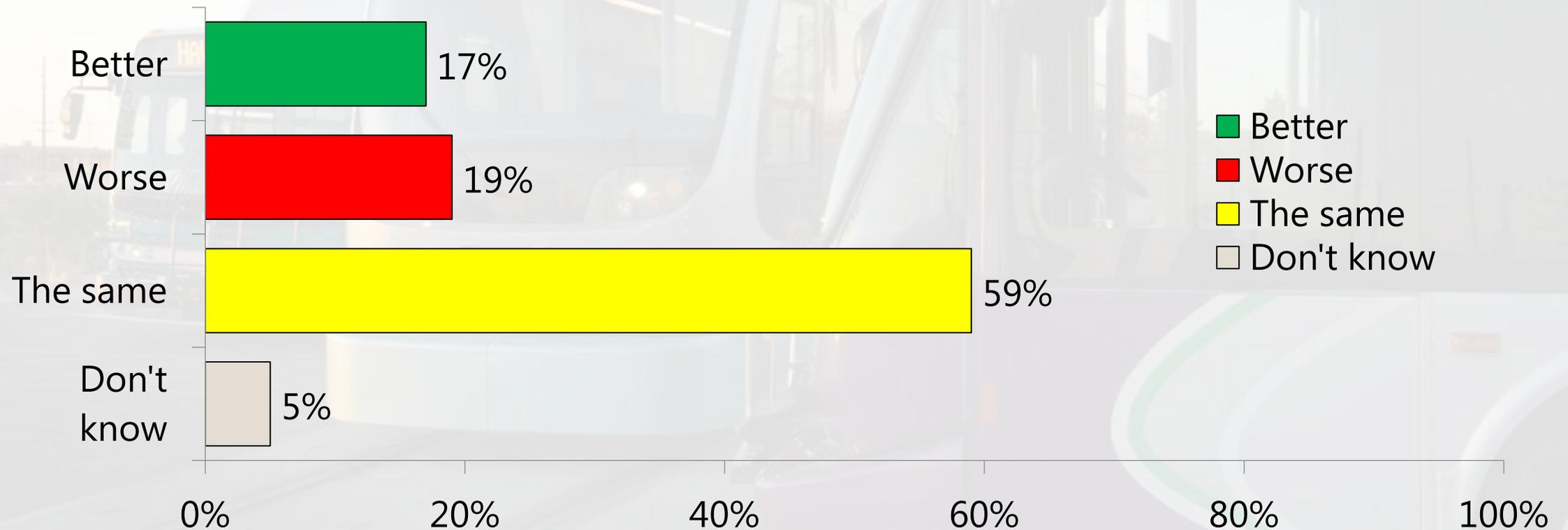
Demographic Category	Total n=602
Gender	
Male	49%
Female	51%
Ethnicity	
Caucasian	82%
Hispanic	3%
African American	2%
Asian	2%
Other	6%
Refused	7%
Education level	
College degree or higher	50%
Some college	34%
High school or less	13%

Demographics and Respondent Background

Demographic Category	Total n=602
Age	
Under 55	32%
55 and over	68%
Political Affiliation	
Republican	48%
Democrat	30%
Independent	8%
Other	15%
Annual Household Income	
Under \$50K	29%
\$50K-\$100K	28%
Over \$100K	20%
Refused	22%

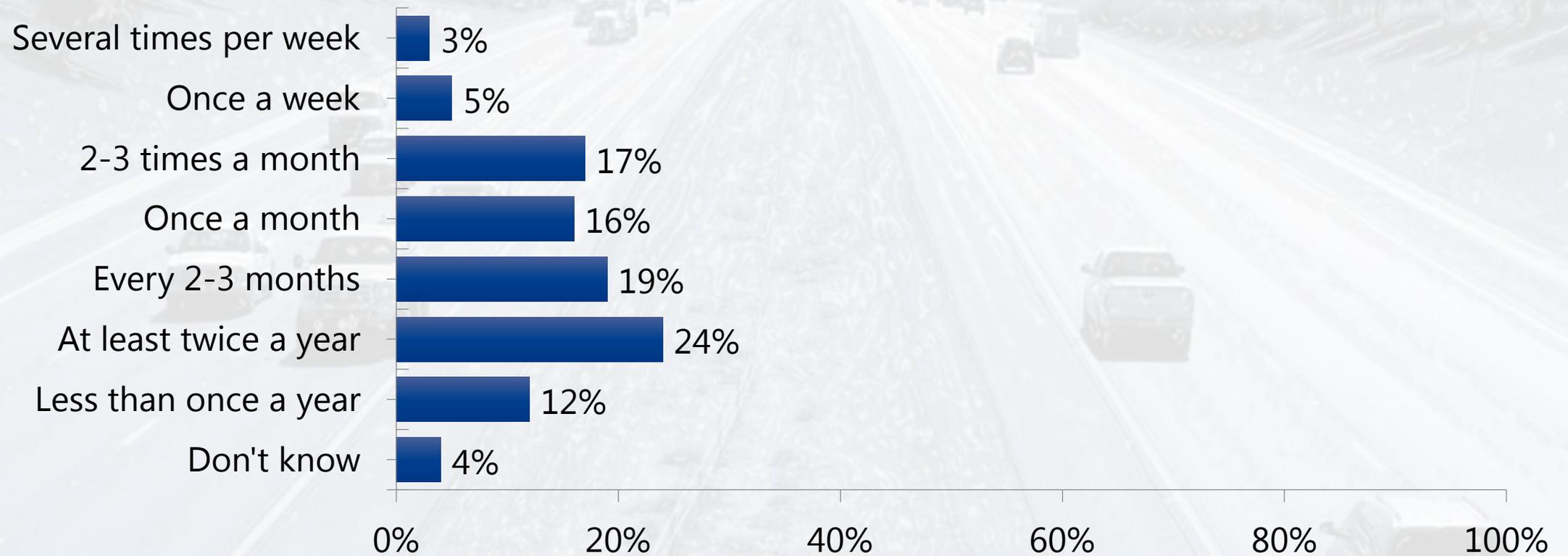
D1. Thinking about the future, do you think you/your family will be in a better or worse financial place next year or will it remain the same?

Perceived Future Financial Status



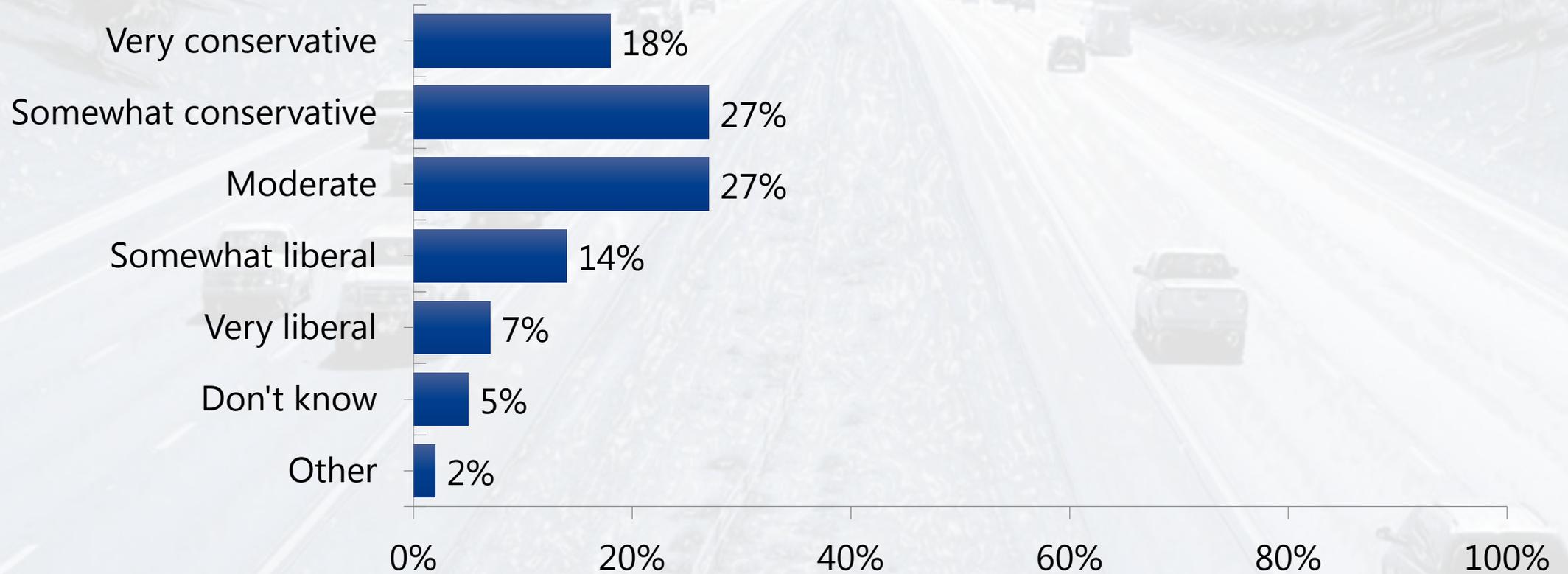
D2. How often do you travel within the state of Arizona, but outside of your county of residence? Would you say..

Frequency of Traveling Outside Own County but Within Arizona



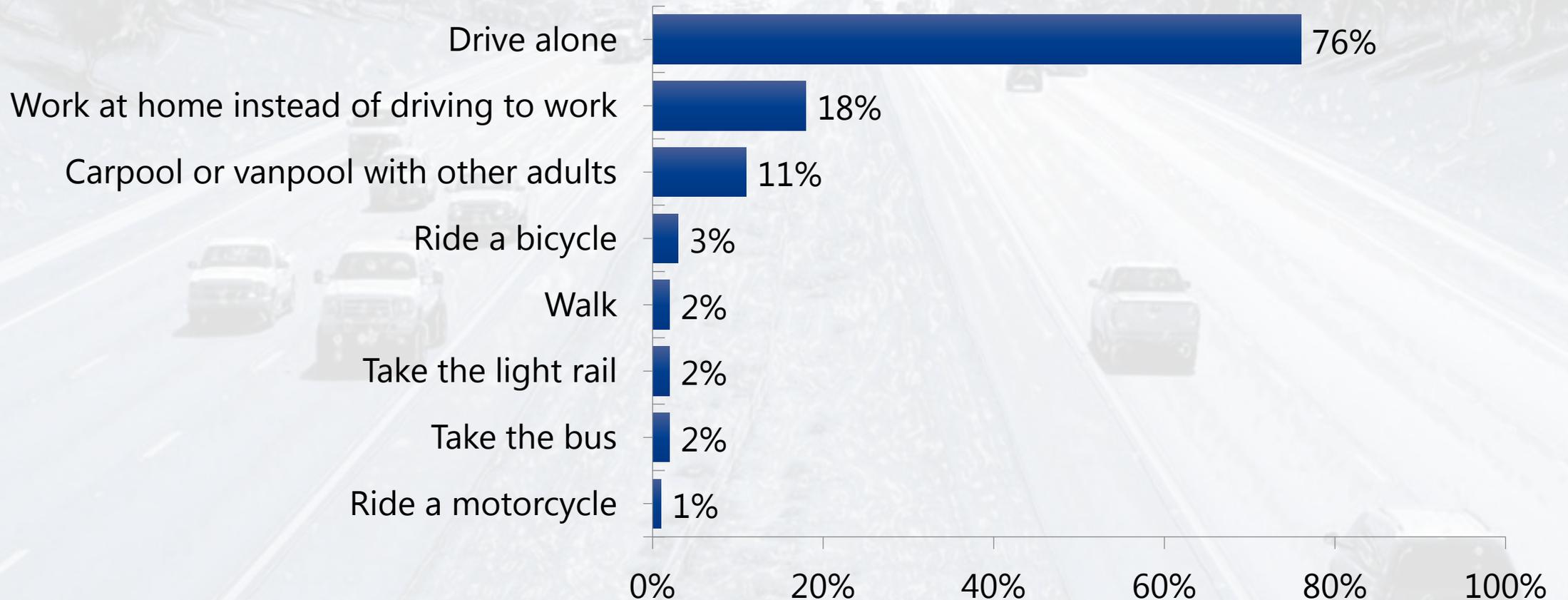
D3. Which of the following best describes your political perspective? Would you say...

Political Perspective

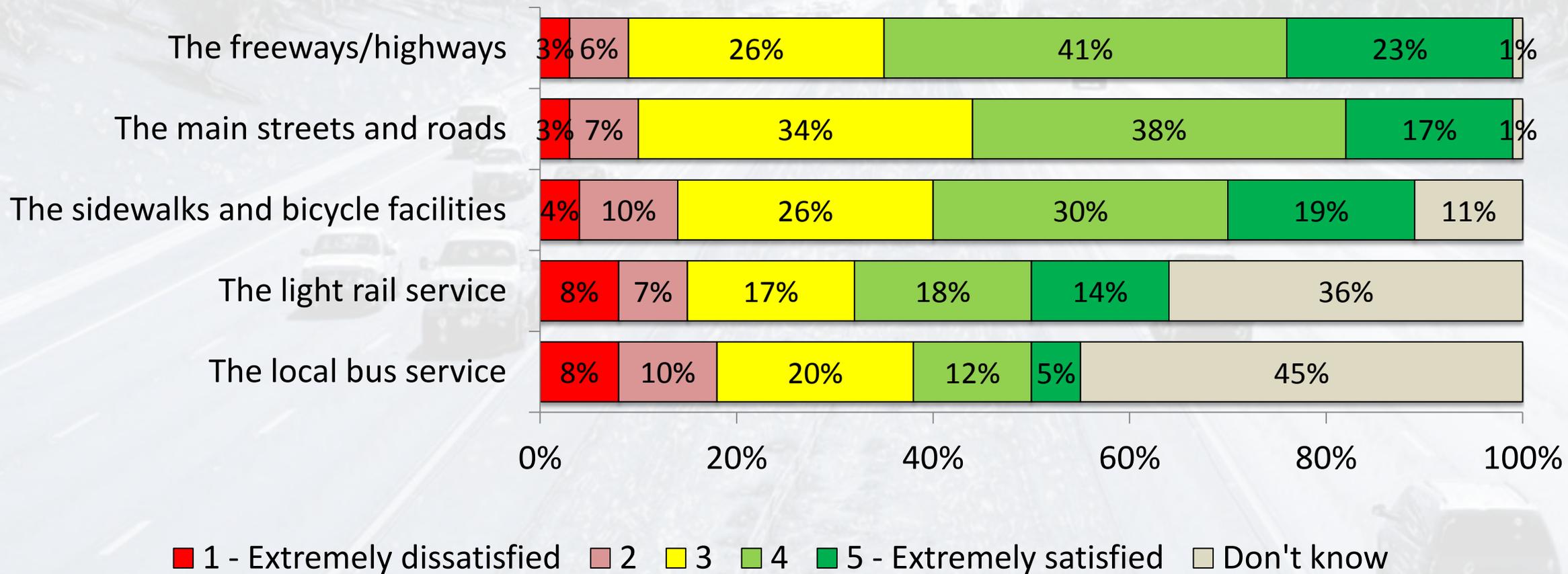


Q3. During a typical week, which of the following methods do you use to get to work? Do you?

Methods Used to Get to Work



Q1. Using a scale of 1 to 5, where 1 means extremely dissatisfied and 5 means extremely satisfied, how satisfied are you with each of the following components of the transportation system in the greater Phoenix area. To start, how satisfied are you with. . .?



Satisfaction with Components of the Greater Phoenix Transportation System by County (%Top-Two Ratings)

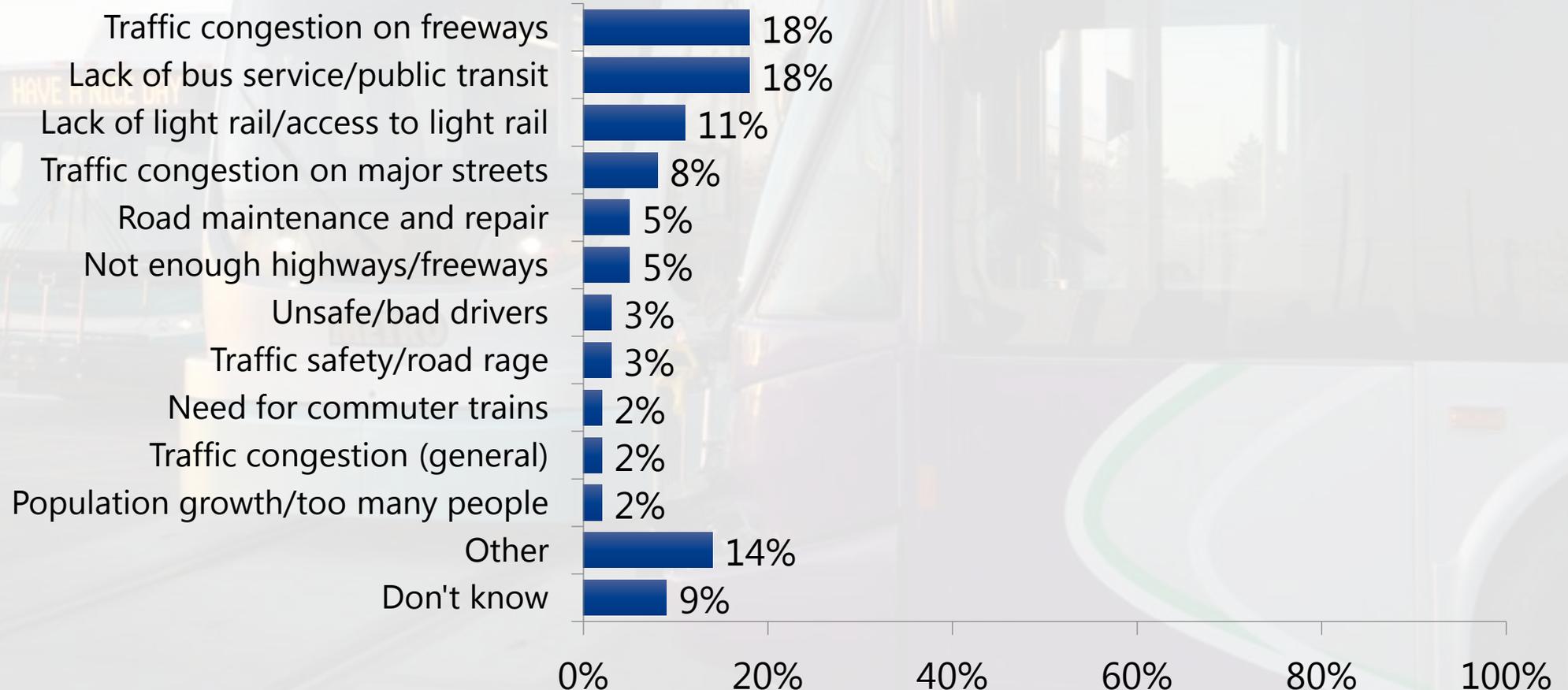
Component	Total n=602	County	
		Maricopa n=552 A	Pinal n=50 B
The freeways/highways	64%	64%	60%
The main streets and roads	55%	55%^B	36%
The sidewalks and bicycle facilities	49%	48%	42%
The light rail service	32%	32%	30%
The local bus service	17%	17%	12%

^{AB} Indicates significant statistical difference in comparison to other sub-group(s) at the 95% confidence level

Q2. What do you think is the ONE most important transportation-related issue or problem in the greater Phoenix area today? (Open Ended)

Most Important Transportation-Related Issue Facing Greater Phoenix

Top Responses



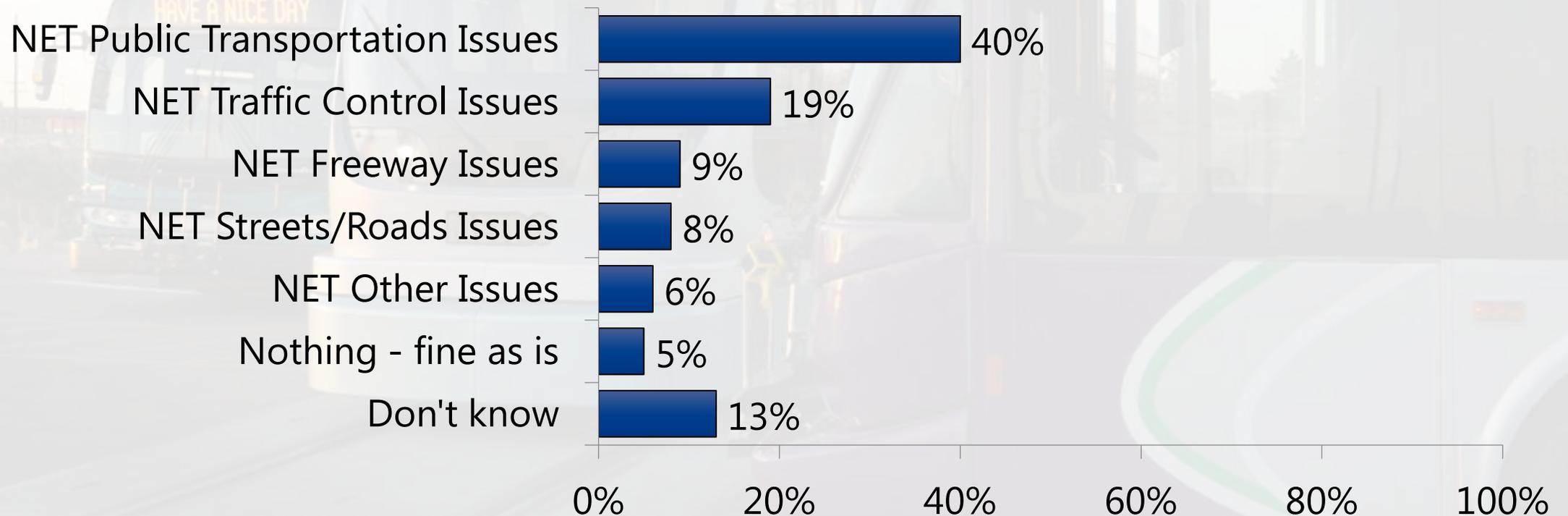
ONE most important transportation-related issue or problem with Historical 2008 Data for Reference

Most Important Issues Mentioned	2013 n=602	Most Important Issues Mentioned (Note: Code list not precisely the same as in 2013)	2008 (statewide) n=736
Traffic congestion on freeways	18%	Lack of public transit	30%
Lack of bus service/public transit	18%	Gas prices	15%
Lack of light rail/access to light rail	11%	Not enough highways/freeways	12%
Traffic congestion on major streets	8%	Traffic congestion (general)	11%
Road maintenance and repair	5%	Road maintenance and repair	4%
Not enough highways/freeways	5%	Pollution	3%
Unsafe/bad drivers	3%	Population growth/too many people	3%
Traffic safety/road rage	3%	Not enough roads/small roads	2%
Need for commuter trains	2%	Lack of funding	2%
Traffic congestion (general)	2%	Need for commuter trains	2%
Population growth/too many people	2%	Poor planning	2%
Other	14%	Other	6%
Don't know	9%	Don't know	8%

*Due to variations in comment code-lists between years, and demographic differences of sample composition between years, historical data provided is for reference only and not for statistical comparison.

Q4. What do you feel is the ONE most important thing that could be done to improve transportation problems in your area? (Open Ended)

Most Important Improvement for Transportation System in Your Area
Top Responses



Q4. What do you feel is the ONE most important thing that could be done to improve transportation problems in your area? (Open Ended)

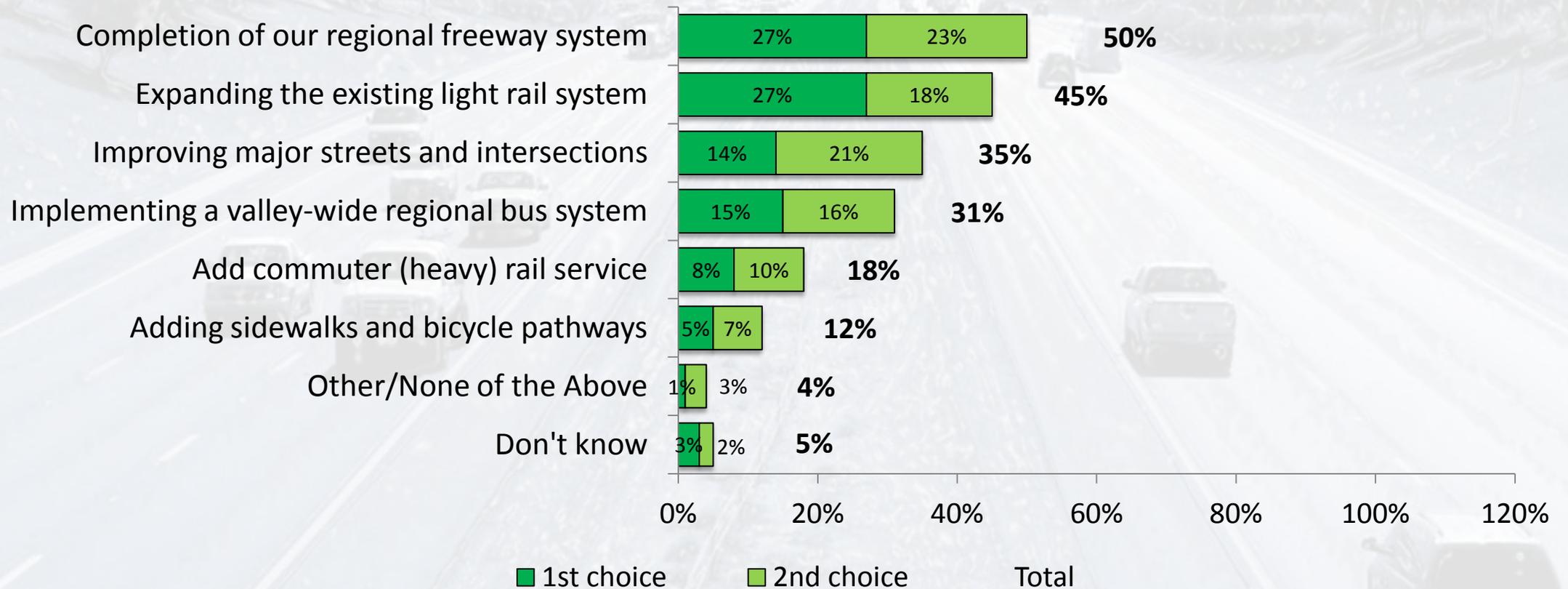
Improvements	Total n=602
NET Public Transportation Issues	40%
Top Individual Public Transportation Comments	
Light rail	13%
Expand bus coverage	12%
More frequent bus service	6%
Improve/need more	5%
Commuter rail	1%
More stops, closer	1%
Longer hours of service	1%
Encourage people to use public transit	1%

Q4. What do you feel is the ONE most important thing that could be done to improve transportation problems in your area? (Open Ended)

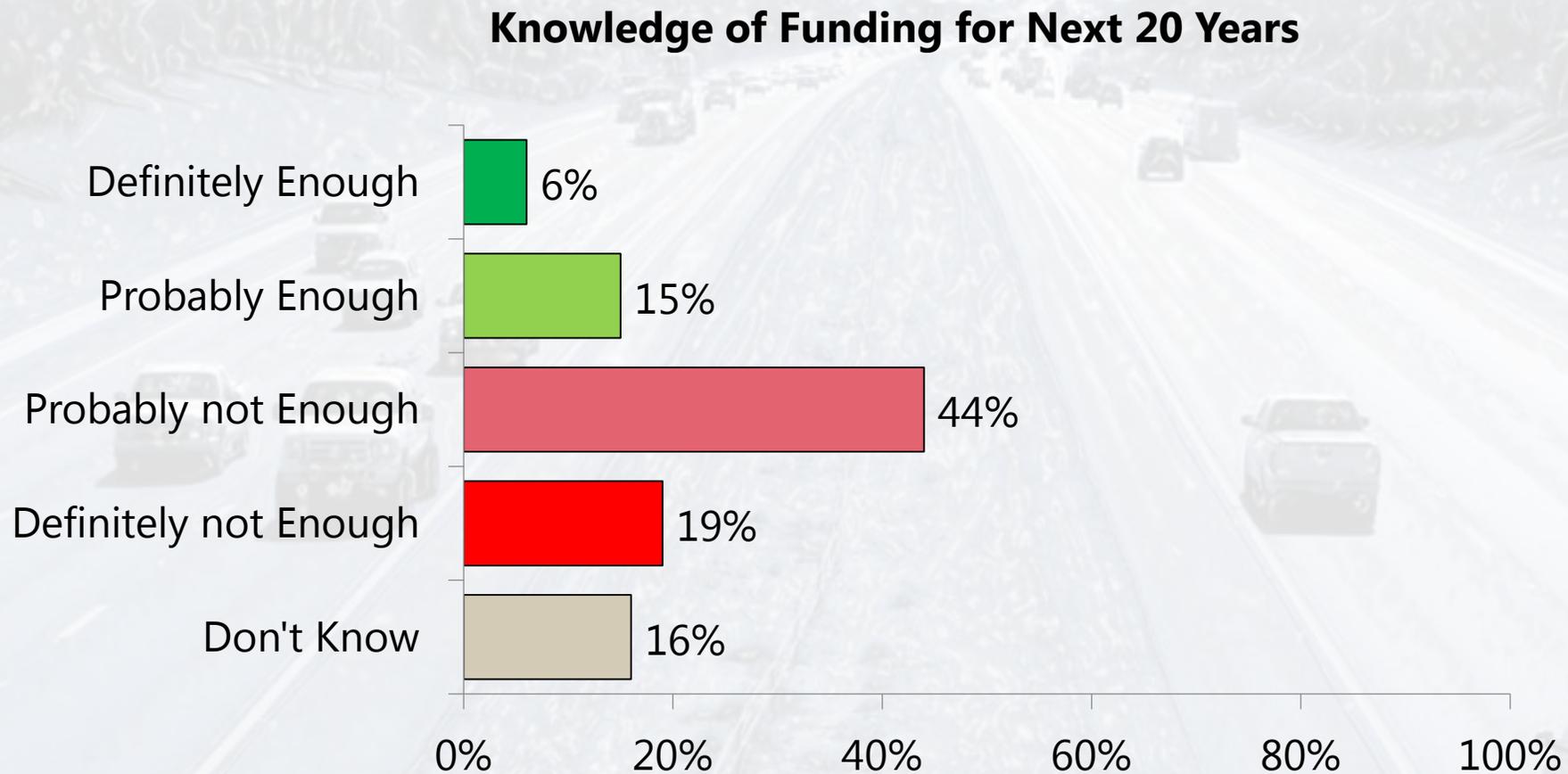
Improvements	Total n=602
NET Traffic Control Issues	19%
Top Individual Traffic Control Comments	
Better traffic control	4%
Synchronize lights	4%
More traffic lights	3%
Better law enforcement/police patrol	3%
More carpooling/encourage people to use carpool/bike/walk	2%
Control growth	1%
Sidewalks /bike paths	1%
Better planning	1%

Q5. Of the following six components of the transportation system, which one do you think should be the number one priority for the greater Phoenix area? Of the remaining items, which one should be the second highest priority?

Top Priorities for Greater Phoenix Transportation System Components

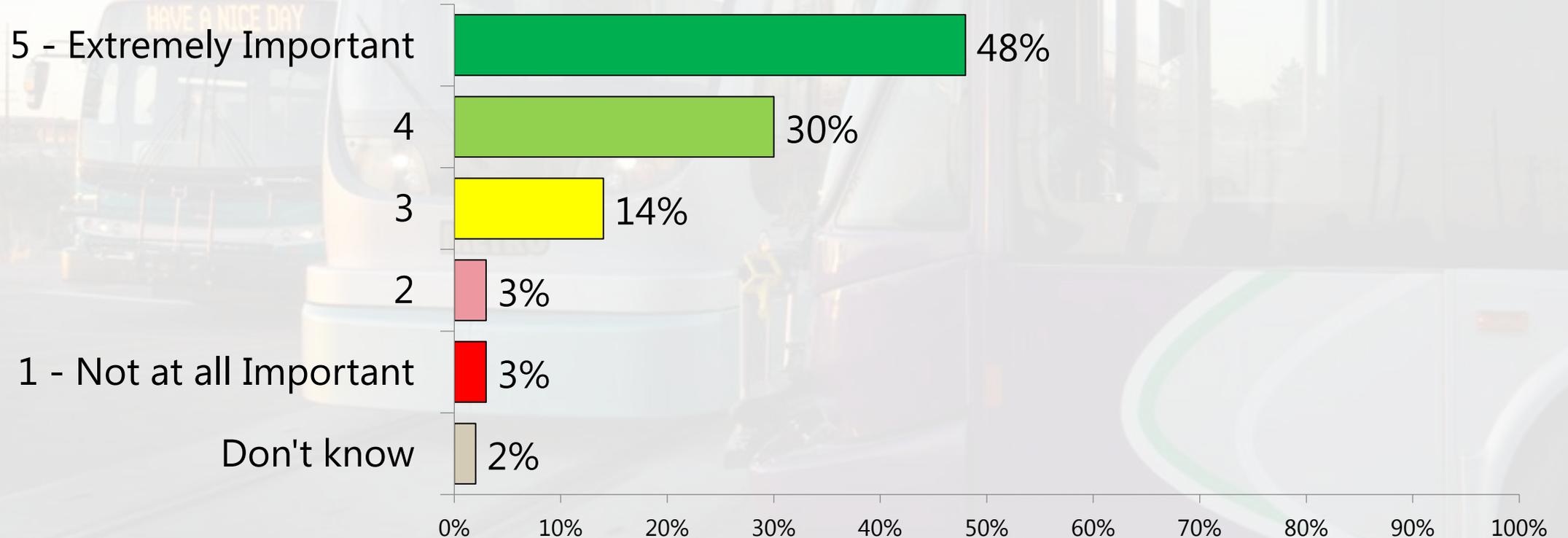


Q6. Next, as far as you know, is there definitely, probably, probably not, or definitely not enough funding available to cover needed transportation improvements in the greater Phoenix area over the next 20 years?



Q7. How important is the regional transportation system for the Greater Phoenix area's economy? Please use a 1 to 5 scale where 1 means not at all important and 5 mean extremely important.

Transportation System and the Economy

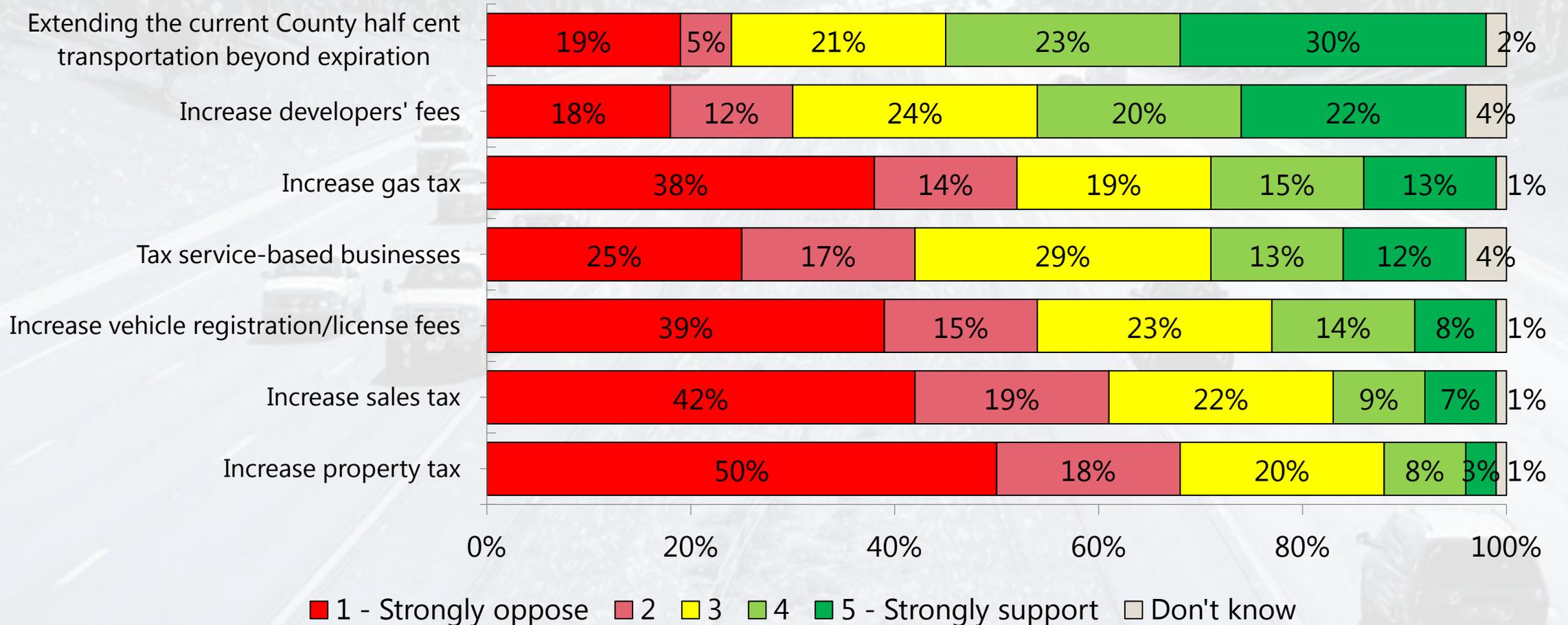


Preamble

I am going to read some information to you and then ask you some questions based on this information.

Our transportation system primarily relies on gas taxes and dedicated sales taxes for funding. The Arizona gas tax has been 18 cents a gallon since 1991, which means that the purchasing power of the gas tax is almost 60 percent less due to inflation and increased fuel economy. The 20-year transportation sales tax for Maricopa County, which ends in 2025, is expected to generate 40 percent less than projected due to the recession. Because of lower revenue, maintenance and expansion of major parts of the regional transportation system have been delayed indefinitely.

Q8. Based on that information, using a 1 to 5 scale where "1" means you "strongly oppose" an option and "5" means you "strongly support" an option, please rate your level of support for each proposed funding option to improve the transportation system in the greater Phoenix area.



Support for Potential New Revenue Streams in Greater Phoenix by Political Persuasion (% - (4)Somewhat and (5)Strongly Support)

Support for Potential New Revenue Streams (NET 4-5 ratings)	Total n=602	Political Persuasion		
		Very/somewhat conservative n=273 A	Moderate n=164 B	Very/somewhat liberal n=127 C
Extending the current County half cent transportation tax beyond 2025 when it expires	53%	48%	56%	67% ^A
Increase developers' fees	42%	34%	40%	60% ^{AB}
Increase the Arizona gas tax	28%	20%	32% ^A	44% ^{AB}
Tax service-based businesses	25%	19%	23%	44% ^{AB}
Increase vehicle registration/license fees	22%	17%	28% ^A	28% ^A
Increase sales tax	16%	13%	17%	24% ^A
Increase property tax	11%	9%	11%	17% ^A

^{ABC} Indicates significant statistical difference in comparison to other sub-group(s) at the 95% confidence level

Support for Potential New Revenue Streams in Greater Phoenix by Q7 (% - (4)Somewhat and (5)Strongly Support)

Potential New Revenue Stream	Total n=602	Q7 – Perceived Importance of Transportation System to Economy	
		“1 – Not at all Important” to “3” Ratings n=121 D	“4 to “5 – Extremely Important” Ratings n=472 E
Extending the current County half cent transportation tax beyond 2025 when it expires	53%	38%	58% ^D
Increase developers’ fees	42%	26%	46% ^D
Increase the Arizona gas tax	28%	14%	32% ^D
Tax service-based businesses	25%	17%	28% ^D
Increase vehicle registration/license fees	22%	8%	25% ^D
Increase sales tax	16%	6%	19% ^D
Increase property tax	11%	6%	13% ^D

^{DE} Indicates significant statistical difference in comparison to other sub-group(s) at the 95% confidence level

Support for Potential New Revenue Streams in Greater Phoenix with Historical 2008 Data for Reference (% - (4)Somewhat and (5)Strongly Support)

Potential New Revenue Stream	2013 n=602	Proposed Revenue Stream	2008* (Maricopa County) n=367-369
Extending the current County half cent transportation tax beyond 2025 when it expires	53%	N/A	N/A
Increase developer fees	42%	Increase developer fees	57%
Increase the Arizona gas tax	28%	N/A	N/A
Increasing the businesses that are taxed to include service based businesses	25%	Broaden the base of sales tax into areas that do not currently charge it	35%
Increase vehicle registration/ driver's license fees	22%	Increase vehicle license fees	19%
Increase sales tax	16%	Increase statewide sales tax	24%
Increase property tax	11%	Increase statewide property taxes	12%

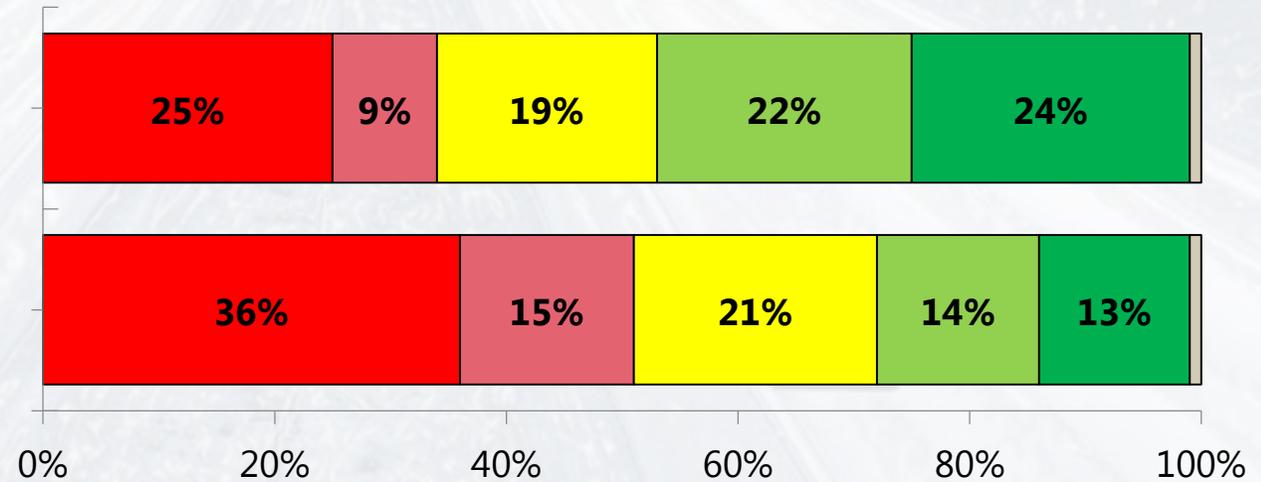
*Due to variations in wording between years, and demographic differences of sample composition between years, historical data provided is for reference only and not for statistical comparison.

Q9. Using the same 1 to 5 scale, please rate your level of support for an increase in the taxes dedicated for transportation improvements if it would result in you paying approximately \$50 more in taxes spread across the course of a year.

Q10. Again, using the same 1 to 5 scale, please rate your level of support for increasing the gas tax each year in the future to match the general inflation rate in order to fund transportation system improvements.

Approximately \$50 new taxes over the course of a year

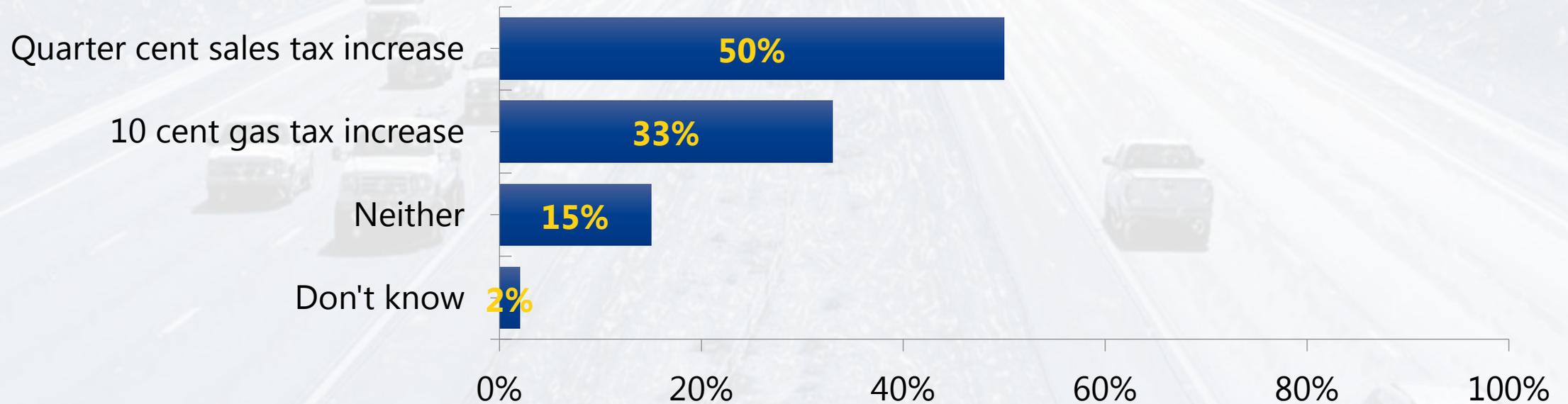
Indexing the gasoline tax to match inflation



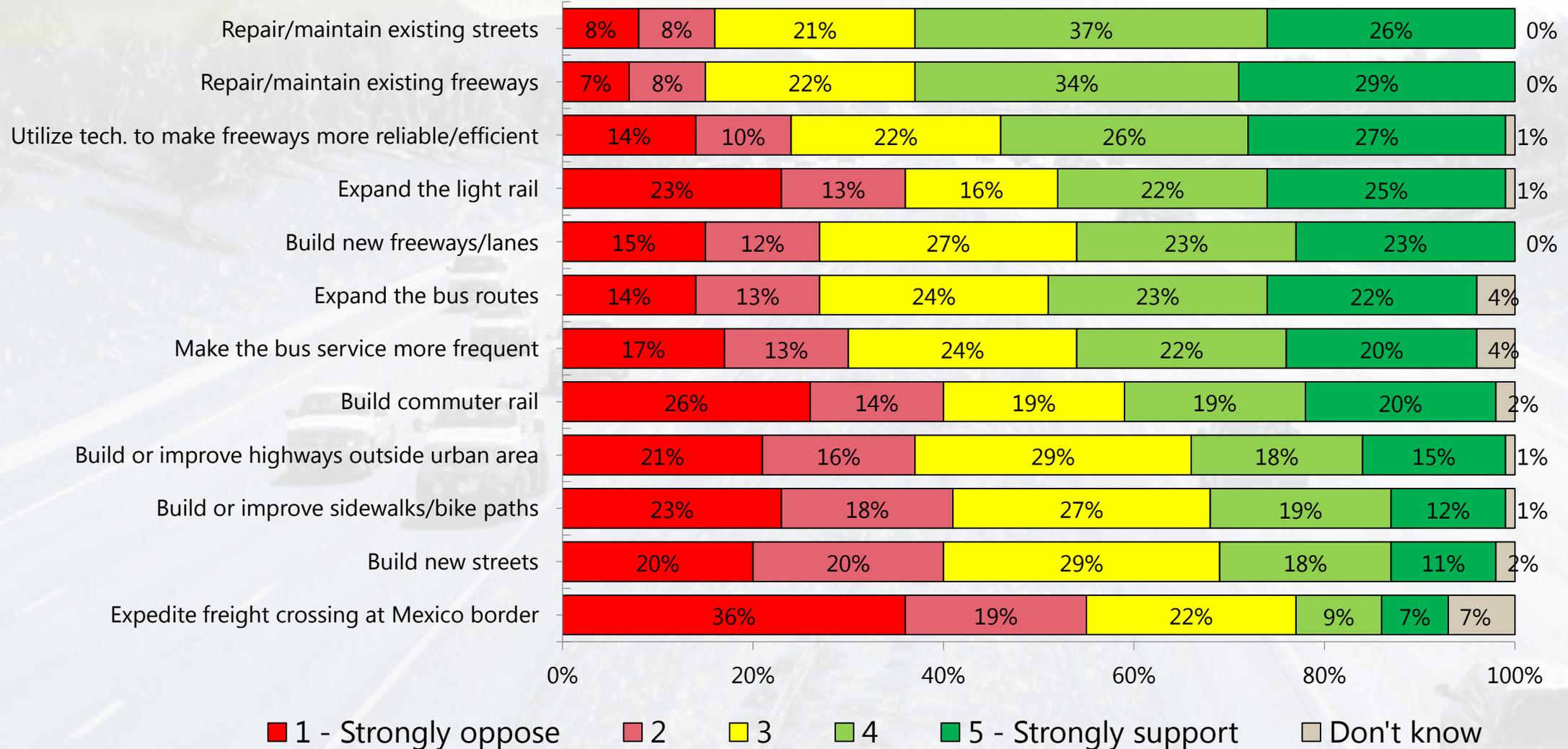
■ 1 - Strongly oppose ■ 2 ■ 3 ■ 4 ■ 5 - Strongly support ■ Don't know

Q11. If you had a choice of paying this \$50 more per year in the sales tax or gas tax, which is about a quarter of a cent increase in sales tax or a 10 cent increase per gallon in gas tax, which tax would you prefer?

Support for Sales Tax Increase vs. Gas Tax Increase



Q12. Using a 1 to 5 scale where "1" means "not at all supportive" and "5" means "very supportive," how supportive of additional taxes or fees would you be if the money would be used to...



Support for Proposed Usage of Additional Fees

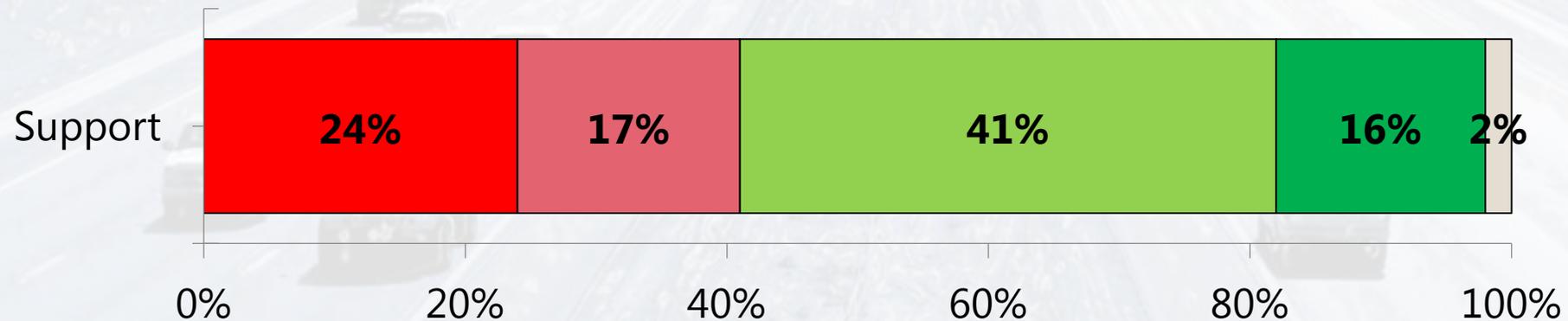
Political Persuasion - (% - (4)Somewhat and (5)Strongly Support)

Proposed Usage of Additional Fees	Total n=602	Political Persuasion		
		Very/somewhat conservative n=273 A	Moderate n=164 B	Very/somewhat liberal n=127 C
Repair, rebuild, and maintain existing streets	63%	58%	66%	69% ^A
Repair, rebuild and maintain existing freeways	63%	60%	66%	66%
Utilize technology to make freeways more reliable/efficient	53%	46%	58% ^A	64% ^A
Expand the light rail	47%	29%	56% ^A	71% ^{AB}
Build new freeways/freeway lanes	46%	45%	45%	51%
Expand the bus routes	45%	33%	52% ^A	62% ^A
Make the bus service more frequent	42%	30%	42% ^A	64% ^{AB}
Build commuter rail	39%	25%	45% ^A	65% ^{AB}
Build new or improve highways outside the urban area	33%	30%	35%	41% ^B
Build or improve sidewalks and bicycle lanes/paths	31%	22%	34% ^A	47% ^{AB}
Build new streets	29%	30%	33%	24%
Expedite freight crossings at the Mexico border for easier freight movement	16%	9%	24% ^A	24% ^A

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Q13. How likely are you to support a tax increase if all of the money is used for regional transportation projects that may not be in your community?

Support for Sales Tax Increase if Not Fully Utilized in Own Community



■ Not at all likely ■ Not very likely ■ Somewhat likely ■ Very likely ■ Don't know

Conclusions

- Voters don't appear to support any new taxes/fees
- Voters not overwhelmingly ready to support the extension of the existing ½ cent sales tax.
- Little interest/support for increasing the gas tax
- Many "undecided" or "middle of the road" = room for education
- Majority of the voters understand the link between transportation and the economy
- *This can be the foundation to build the case for the need for additional funds*

Conclusions

- Many responses emphasized the need for public transportation improvements
- Satisfaction was high with freeways and roads/streets, but voters want additional funding to improve and maintain the existing freeways and streets.
- While improved public transportation is important by voters, they also recognize the importance of maintaining the existing roads.

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