Methodology
Sampling Plan

Study Area

ZIP Codes Where Residents Were Surveyed
Sampling Plan

Number of Survey Respondents by ZIP Code of Residence

- ≤12
- 13 - 17
- 18 - 29
- 30 - 38
- >38

0 5 10 15 20 Miles

BMC Attitudes & Behavior Study
Current Travel and Attitudes
Commute Travel

AREA COMMUTERS USING PUBLIC TRANSPORTATION FOR THEIR COMMUTE

- **Urban Core**: 27%
- **Total Baltimore Area**: 20%
- **Carroll County**: 7%
- **Harford County**: 14%
- **Howard County**: 15%
- **Anne Arundel County**: 13%
- **Annapolis**: 8%
### Commute Travel

#### Commute Market Share by Mode Type

<table>
<thead>
<tr>
<th>Location</th>
<th>Drive Alone</th>
<th>Rideshare</th>
<th>Walk/Bike</th>
<th>Public Transportation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Baltimore Area</td>
<td>65%</td>
<td>10%</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td>Urban Core</td>
<td>53%</td>
<td>13%</td>
<td>10%</td>
<td>23%</td>
</tr>
<tr>
<td>Carroll County</td>
<td>92%</td>
<td>4%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Harford County</td>
<td>82%</td>
<td>7%</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Howard County</td>
<td>81%</td>
<td>5%</td>
<td>3%</td>
<td>11%</td>
</tr>
<tr>
<td>Anne Arundel County</td>
<td>76%</td>
<td>8%</td>
<td>3%</td>
<td>13%</td>
</tr>
<tr>
<td>Annapolis</td>
<td>65%</td>
<td>15%</td>
<td>15%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Commute Travel

CONSIDERATION OF PUBLIC TRANSPORTATION FOR COMMUTE IF IT WERE AVAILABLE WHEN NEEDED

Would Consider Using Public Transit/Currently Use
Would NOT Consider Using Public Transit
Personal Travel

AREA RESIDENTS USING PUBLIC TRANSPORTATION FOR PERSONAL TRAVEL

- Urban Core: 28%
- Total Baltimore Area: 15%
- Carroll County: 0%
- Harford County: 8%
- Howard County: 12%
- Anne Arundel County: 12%
- Annapolis: 11%
CONSIDERATION OF PUBLIC TRANSPORTATION FOR PERSONAL TRIPS IF IT WERE AVAILABLE WHEN NEEDED

Would Consider Using Public Transit, or Currently Use It

Would NOT Consider Using Public Transit
Ratings of Public Transit Modes

AWARENESS AND USAGE OF TRANSIT MODES

- **Net: Familiar**
  - Very Familiar/Currently Use: 71%
  - Somewhat Familiar: 35%
  - Know Only the Name: 22%
  - Never Heard Of: 5%

- Very Familiar/Currently Use:
  - MARC: 36%
  - MTA Light Rail: 47%
  - MTA Local Buses: 40%
  - MTA Commuter Buses: 54%
  - MTA Metro Subway: 69%

- Somewhat Familiar:
  - MARC: 16%
  - MTA Light Rail: 33%
  - MTA Local Buses: 23%
  - MTA Commuter Buses: 33%
  - MTA Metro Subway: 33%

- Know Only the Name:
  - MARC: 23%
  - MTA Light Rail: 34%
  - MTA Local Buses: 25%
  - MTA Commuter Buses: 25%
  - MTA Metro Subway: 6%

- Never Heard Of:
  - MARC: 11%
  - MTA Light Rail: 41%
  - MTA Local Buses: 41%
  - MTA Commuter Buses: 6%
  - MTA Metro Subway: 27%

- Usage:
  - 55% of respondents currently use MARC.
  - 53% of respondents currently use MTA Light Rail.
  - 51% of respondents currently use MTA Local Buses.
  - 53% of respondents currently use MTA Commuter Buses.
  - 55% of respondents currently use MTA Metro Subway.

BMC Attitudes & Behavior Study
Ratings of Public Transit Modes

Overall Impression of Mode

- **Cars**: 59%
- **MARC**: 53%
- **MTA Light Rail**: 33%
- **MTA Local Buses**: 29%
- **MTA Commuter Buses**: 28%
- **MTA Metro Subway**: 33%
- **RTA**: 15%
- **Annapolis City Buses**: 16%
- **Harford Transit LINK**: 37%
- **Carroll Transit System Trailblazer**: 18%

Rating 8-10
Segmentation Analysis
## Road Worriers

<table>
<thead>
<tr>
<th>Counties</th>
<th>19% of area residents</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>31% of Howard County residents</td>
</tr>
<tr>
<td></td>
<td>28% of Anne Arundel County residents</td>
</tr>
</tbody>
</table>

### Mode Usage
- 32% use public transit
- 59% of commutation trips SOV, 21% by public transit
- Average commute is 44 minutes
- 50% of personal trips by SOV, 4% by public transit

### Transit Friendly Attitudes
- 78% would consider commuting by public transit
- 62% would consider public transit for personal travel
- 84% consider driving during rush hour to be very stressful
- 74% have regularly used public transit at some point in their lives
- 62% say leaving driving to someone else is desirable to them
- 91% are likely to support increased funding for public transportation

### Barriers to Transit Use
- 79% say they choose to travel by car because their time is very valuable to them.
- 75% often do errands during lunchtime or on the way home from work
- 52% often make trips to pick-up or drop-off children or other family members
- 47% say their work schedule is unpredictable

### Demographics
- 55% White / 32% Black/African-American
- 61% female
- 53% have post-graduate work/degree
- 34% Millennials
**Car Commandos**

<table>
<thead>
<tr>
<th>Counties</th>
<th>29% of Carroll County residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>17% of area residents</td>
<td></td>
</tr>
</tbody>
</table>

BMC Attitudes & Behavior Study
## Urban Trippers

<table>
<thead>
<tr>
<th>Counties</th>
<th>19% of area residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>17% of Baltimore City residents</td>
<td></td>
</tr>
<tr>
<td>15% of Harford County residents</td>
<td></td>
</tr>
<tr>
<td>15% of Annapolis residents</td>
<td></td>
</tr>
</tbody>
</table>
### BMC Attitudes & Behavior Study

#### Carmudgeons

<table>
<thead>
<tr>
<th>Carmudgeons</th>
<th>14% of area residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counties</td>
<td>20% of Annapolis residents</td>
</tr>
</tbody>
</table>

#### Mode Usage

- 14% use public transit
- 86% of commutation trips SOV, 7% by public transit
- Average commute is 29 minutes
- 76% of personal trips by SOV, 1% by public transit

#### Transit Attitudes

- Few describe cars as:
  - Being a relaxing and stress-free way to travel (34%)
  - Being cost effective (26%)
  - Being safe from accidents (25%)
- 58% are likely to support increased funding for public transportation

#### Barriers to Transit Use

- 45% would consider commuting by public transit
- 27% would consider public transit for personal travel
- 77% say cars are available when they need them
- 73% say cars fit into their lifestyle
- 70% say cars are easy to use
- 70% say cars are reliable

#### Few describe public transit as:

- Being available when they need it
- Being a fast way to travel
- Fitting into their lifestyle

#### Demographics

- 80% White / 14% Black/African-American
- 53% male
- 84% have college degree
- 54% 45 or older / 37% Millennials
- Wealthiest segment ($110,000 median income)
Retired but Ready

32% of area residents

Counts: 43% of Carroll County residents

Mode Usage
- 23% use public transit
- 48% of personal trips by SOV

Transit Friendly
- 59% would consider public transit for personal travel
- 64% consider driving during rush hour to be very stressful
- 62% used public transit at some point
- 54% would leave driving to others
- Only 51% consider traveling by car cost effective
- 72% are likely to support increased funding for public transportation

Barriers to Transit Use
- 63% travel by car because their time is valuable
- 51% consider privacy important when traveling

Demographics
- None are employed, 73% retired
- 62% White / 31% Black/African-American
- 56% female
- 53% do not have college degree
- Average age 62 years old, 50% 65 or older
- Low income segment ($56,000 median income), 35% have incomes below $25,000

BMC Attitudes & Behavior Study
Recommendations
BMC Recommendations

- Engage in regional educational initiatives to promote **existence and availability** of transit
- Launch **targeted marketing campaigns** to promote transit as a viable option for all residents of the region
- Investigate the potential of **flexible or demand responsive feeder service**
LOTS Recommendations: Overall

- Continually perform **outreach** to promote systems; **educate** on how to use the system
- Engage in **targeted marketing or outreach**
- Consider **technological investments**, especially real-time information
LOTS Agency Recommendations

Annapolis DOT
Evaluate increasing frequency; extending service hours; and expanding the service area

Carroll Transit System
Evaluate route deviation zone; evening and weekend flex service; increased frequencies; public education; and O-D studies

Harford Transit LINK
Evaluate cost of providing demand responsive weekend service

Regional Transportation Agency
Commence public education campaign; consider O-D study; assess peak hour demand; and evaluate increasing frequency
MTA Recommendations

**Local Bus**
Evaluate crime at and around stations and on board vehicles

**Commuter Bus**
Engage in a public education campaign as part of BaltimoreLink service changes to Commuter Bus

**Light Rail**
Improve accessibility at Light Rail stations

**Metro Subway**
Assess customer opinions; evaluate station safety; and consider accessibility improvements

**MARC**
Survey customers to determine where future MARC station locations may be warranted
Q & A