2019 Northwest Arkansas Regional Transportation Survey

Final Findings Report

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Submitted to the NWA Regional Planning Commission

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Northwest Arkansas Regional Planning Commission (NWARPC)
2019 Regional Transportation Survey
Executive Summary

Overview and Methodology

During September 2019, ETC Institute administered a regional transportation survey for the Northwest Arkansas Regional Planning Commission (NWARPC). The purpose of the survey was to gather input from residents to better understand the level of satisfaction with the region’s transportation system and attitudes toward prioritizing transportation improvements.

A five-page survey was mailed to a random sample of households in the Northwest Arkansas planning area, which includes Benton and Washington Counties. Each survey packet contained a cover letter, a copy of the survey, and a postage-paid return envelope. Residents who received the survey were given the option of returning the survey by mail or completing it online. Seven to ten days after the surveys were mailed, ETC Institute sent emails and placed phone calls to the households that received the survey to encourage their participation.

The emails contained a link to the online version of the survey to make it easy for residents to complete the survey. To prevent people who were not residents of the Northwest Arkansas Region from participating, everyone who completed the survey online was required to enter their home address prior to submission of the survey. ETC Institute then matched the addresses entered online with the addresses originally selected for the random sample. If the address from a survey completed online did not match a selected sampled address, the online survey was excluded. More than 800 households (15.8% response rate) in Washington and Benton Counties completed the survey, with a minimum of 365 surveys completed in Washington County and 469 completed in Benton County. The overall results for the random sample of 834 households have a 95% level of confidence with a precision of at least +/- 3.53%. The results for Benton County have a 95% level of confidence with a precision of at least +/- 4.6% and the results for Washington County have a 95% level of confidence with a precision of at least +/- 5.1%. Of the 834 households that responded, 370 were completed and returned in the mail and 464 were completed online.
**Location of Respondents.** To better understand how well the regional transportation system functions in different parts of the Northwest Arkansas (NWA) planning area, the home address of each respondent to the survey was geocoded. The map showing the location of respondents of this survey is provided to the right.

**Don’t knows.** Since the number of “don’t know” responses often reflects the utilization and awareness of regional services, the percentage of “don’t know” responses, in most cases, has been included with the tabular data in Section 4 of this report. When the “don’t know” responses have been excluded, the text of this report will indicate that the responses have been excluded with the phrase, “those who expressed an opinion.”

**This report contains:**
- A summary of the methodology for administering the survey and its major findings.
- Charts illustrating the overall results for most questions on the survey (Section 1).
- GIS Maps showing the overall results for selected questions (Section 2).
- An Importance-Satisfaction Analysis (I-S) identifying potential priorities for regional investment (Section 3).
- Tabular results for all survey questions (Section 4).
- The Survey Instrument (Section 5).

*Crosstabulations by Income, Major City, County, and Trip Type have been provided in Appendix 1 - Crosstabulations. The City level results have a 95% level of confidence with a precision of at least +/-7% to +/-10%.*

**Major Findings**

Survey data collected which addresses major transportation issues specific to the Northwest Arkansas (NWA) region are assessed below and on the following pages.
Respondents' Perceptions of the NWA Regional Transportation System

- **Overall Satisfaction Levels with NWA Transportation System**
  The highest levels of satisfaction expressed about any aspect of the NWA area transportation system, based upon the combined percentage of "very satisfied" and "satisfied" responses among residents who had an opinion were: "Availability of off-street paths/trails (60%) and "Flow of traffic on streets at non-peak times" (53%). Respondents who expressed an opinion were least satisfied, based upon the combined percentage of "Dissatisfied" and "Very Dissatisfied" responses with the "Flow of traffic during peak times of day" (77%), "Availability of Public Transit in NWA area" (73%) and "Ease of travel by Public Transportation" (70%). Those who expressed an opinion rated the overall quality of the transportation system in the NWA area as follows: Excellent 2%; Good 27%; Average 42%; Poor 28%.

- **Traffic Congestion in the NWA Area**
  Ninety-four percent of those who expressed an opinion said that compared to five years ago, traffic congestion in the NWA region had "increased a great deal" (73%) or "increased somewhat" (21%). However, more than half of those who expressed an opinion said traffic congestion at rush hour in the NWA region was "better" (16%) or "the same" (36%) as other cities of comparable size they had visited. Respondents were asked to assess traffic congestion between their homes and each of five NWA area communities: Bentonville, Rogers, Fayetteville, Springdale, and Lowell. Those who expressed an opinion were most concerned with traffic congestion between their homes and Bentonville, where 54% said traffic congestion was a "current problem," and an additional 27% of respondents described the area's congestion as an "emerging problem". Traffic in the Rogers area was considered a "current problem" by 40%, and an "emerging problem" by 29% of those who expressed an opinion. Fifty-seven percent of respondents to the question, "Which transportation issues do you think should be most important?" selected "relieve traffic congestion" as one of their top three choices. In fact, more respondents made this response their first choice, than selected any of the other thirteen choices among their top three.

- **Other Current and Emerging Transportation Problems in the NWA Area**
  In addition to traffic congestions issues referenced above, 50% of respondents considered "Capacity of major roads not keeping up with new development" to be a "current problem," while an additional 34% said it was an "emerging problem". "Lack of public transportation/bus service" was deemed to be a current problem by 37% of those expressing an opinion, and an emerging problem by 23%. "Lack of safe and accessible pedestrian facilities" was considered a current problem by 20%, and an emerging problem by 21% of respondents. "Lack of bicycle trails/bike facilities" was considered a current problem by only 10% of respondents, and an emerging problem by the same number (10%). "Air quality": 5% current; 31% emerging, and "Traffic delays caused by trains": 4% current; 7% emerging were the issues least likely to be selected as a current or emerging transportation problem in the NWA Area.
Non-Auto Transportation Issues in the NWA Area

- **Public Transportation**
  A significant percentage of survey respondents who expressed an opinion indicated a lack of satisfaction with a number of public transportation related issues, including:
  - "Availability of public transportation services on weekends" (2% Very Satisfied, 3% Satisfied, 64% Dissatisfied/Very Dissatisfied);
  - "The frequency of bus service where you live" (3% Very Satisfied, 5% Satisfied, 65% Dissatisfied/Very Dissatisfied);
  - "Number of destinations served by public transportation" (2% Very Satisfied, 7% Satisfied, 66% Dissatisfied/Very Dissatisfied);
  - "Days and times when the bus service is provided" (3% Very Satisfied, 7% Satisfied, 60% Dissatisfied/Very Dissatisfied);
  - "Speed of travel by bus in the region" (3% Very Satisfied, 9% Satisfied, 49% Dissatisfied/Very Dissatisfied);
  - "Distance to the nearest bus stop from your home" (4% Very Satisfied, 8% Satisfied, 65% Dissatisfied/Very Dissatisfied);
  - "Availability of information about public transportation services in the region" (3% Very Satisfied, 10% Satisfied, 61% Dissatisfied/Very Dissatisfied); and,
  - "Availability of park and ride facilities" (5% Very Satisfied, 13% Satisfied, 46% Dissatisfied/Very Dissatisfied).
  In answer to the question, "Which best describes your past experience with public transit?" only 10% of respondents who expressed an opinion said they used bus and/or rail public transit regularly. Thirty-one percent indicated they used bus or rail occasionally, while 58% indicated they had no experience with using either bus or rail transit. Additionally, between 46% and 64% of such respondents indicated they were at least "somewhat interested" in using various expanded bus service options, including bus rapid transit and passenger rail service.

- **Air Travel/XNA**
  Survey respondents who expressed an opinion were generally more satisfied with current transportation issues in the NWA area related to air travel. Thirty-six percent said they were either Very Satisfied or Satisfied with "Convenient flight times provided by XNA," while 35% indicated dissatisfaction. Respondents were slightly less positive regarding "Adequate flight routes provided by XNA" (32% Very Satisfied or Satisfied; 48% Dissatisfied/Very Dissatisfied). Respondents indicated their highest level of dissatisfaction with the "Affordability of flights in the region," where 67% answered "Dissatisfied/Very Dissatisfied."

- **Bike Travel**
  Survey respondents expressed a relatively high level of satisfaction with the "Availability of safe biking facilities/lanes where you live" (38% Very Satisfied or Satisfied), and "Availability of bikeshare service" (23% Very Satisfied or Satisfied), although 53% of respondents answered "Neutral" to the bikeshare question, which may indicate a lack of experience with, or exposure to, such services.
- **Ride Share/Car Pool**
  When asked to assess their satisfaction with the "Availability of carpooling service (rideshare)" in the NWA area, 13% of respondents who expressed an opinion indicated they were "Very Satisfied" or "Satisfied." Forty-three percent indicated dissatisfaction. A relatively high percentage of respondents (44%) answered "Neutral".

- **Seniors/Disabled Residents**
  More than half of respondents who expressed an opinion (54%) said they were "Dissatisfied/Very Dissatisfied" with the "Availability of transportation services for seniors and persons with disabilities". Only 17% indicated satisfaction in answer to the question.

### Funding Priorities of NWA Area Residents

- **Public Transportation**
  Seventy-four percent of respondents who expressed an opinion indicated they believed that during the next five years the current level of funding for public transportation in the Northwest Arkansas region should be "much greater" (30%) or "somewhat greater" (44%) than it is now. Only 4% said such funding should be reduced. Eighty-one percent of respondents indicated it is "very important" (55%) or "somewhat important" (26%) for local agencies in the region to support and fund public transportation, while just 6% responded such support was "not important" to them. Seventy-eight percent of respondents thought expanded public transportation services are needed in Benton and Washington Counties and 72% indicated they would be "very supportive" or "somewhat supportive" of paying an increase in taxes to support expanded public transportation services in the NWA Area.

- **Road & Highway**
  When asked to assess how the current level of funding for road and highway improvements in the Northwest Arkansas region should change over the next five years, 72% of respondents indicated the level of funding should be "much greater" (25%) or "somewhat greater" (47%). Twenty-five percent said the funding levels should remain the same, while only 3% felt the funding should be reduced. Sixty-six percent of respondents indicated they would support a highway program that would generate additional revenue. Sixteen percent said they would not support such a program, while 18% indicated they were "satisfied with current highway conditions." Respondents also indicated that "Widening freeways by adding lanes" (33%) and "Rerouting truck traffic or finding another solution to keep freight traffic separate" (29%) were among their four highest priorities for improving transportation in the NWA region.
Transportation Priorities

Recommended Priorities. In order to help the Northwest Arkansas Regional Planning Commission (NWARPC) identify future priorities, ETC Institute conducted an Importance-Satisfaction (I-S) Analysis. This analysis examined the importance residents placed on each element of the NWA area's transportation system and the expressed level of survey respondent satisfaction with each. By identifying transportation issues of high importance and low satisfaction, the analysis identified which among these concerns have the greatest potential impact on the overall satisfaction of NWA residents with the regional transportation system in the future. The overall satisfaction rating is most likely to increase if the NWARPC is able to prioritize and address improvements in elements of the area's transportation system which are identified by the I-S Analysis as having the very highest Importance Satisfaction (I-S) ratings. Details regarding the methodology employed in this analysis are provided in Section 3 of this report.

Based on the results of the I-S Analysis, the public transportation issues which are recommended as top priorities overall in order to raise the overall satisfaction ratings of NWA Area residents with their regional transportation system are listed below:

- Relieve traffic congestion (IS=0.4495)
- Flow of traffic on streets during peak times of day ("rush hours") (IS=0.4251)
- Affordability of flights in the region (IS=0.4023)
- Availability of public transit in NWA (IS=0.2809)
- Number of destinations served by public transportation (IS=0.2466)
- Maintain existing roads and highways (IS=0.2385)
- Provide travel choices other than automobiles (IS=0.2138)

By investing attention, study and resources in these seven areas to the extent it is feasible, the NWARPC will increase the probability that overall satisfaction with the area's transportation system among NWA residents will improve in future years.