Appendix G: Central Lane Metropolitan Planning Organization Travel Barriers and Benefits Survey

July 2020

1. INTRODUCTION AND METHODOLOGY

Introduction: The Central Lane Metropolitan Planning Organization commissioned DHM research to conduct a travel behavior survey to gain public insights into regional perceptions towards travel. From June 25 to July 10, 2020 DHM Research conducted a survey of residents in the Central Lane Transportation Management Area (TMA), which encompasses the cities of Eugene, Springfield, Coburg, and surrounding urban area. The purpose of the survey was to assess perceptions of the transportation system and to obtain a better understanding of travel priorities and behavior. This survey is a follow-up to a similar survey DHM conducted in 2014: the 2014 Eugene-Springfield Metropolitan Area Travel Barriers and Benefits Survey.

Research Methodology: This hybrid (telephone and text-to-online) survey consisted of 502 residents and took approximately 21 minutes to complete. This is a sufficient sample size to assess opinions generally and to review findings by multiple subgroups, including age, gender, area, and party affiliation.

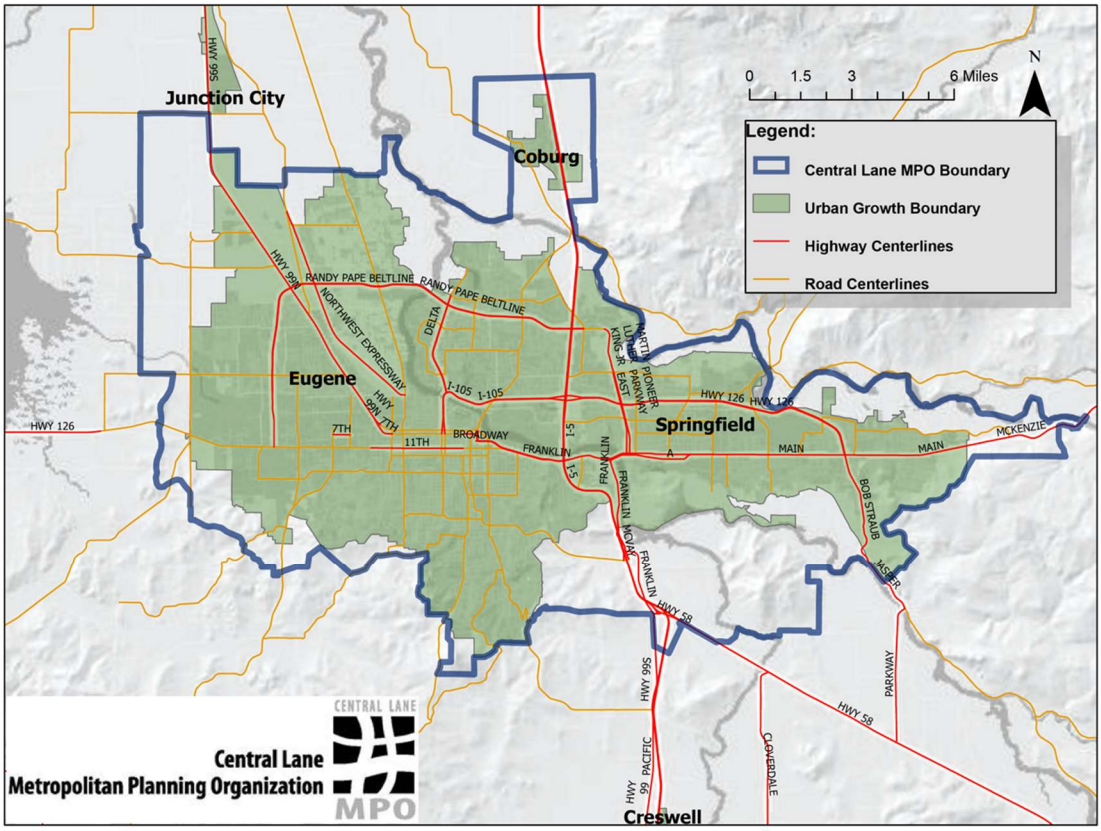
Respondents were contacted from multiple lists: a list of registered voters; a landline household list compiled from public records and consumer lists; and a cellular consumer list developed from cell and cable consumer information matched to publicly available address information. Telephone respondents were contacted by a live interviewer and text-to-online respondents received a text invitation directing them to an online survey. Text-to-online respondents were offered a $5 incentive for their participation. In gathering responses, a variety of quality control measures were employed, including questionnaire pre-testing and validation. Quotas were set by age, gender, area, and party affiliation to ensure a representative sample.

For the purposes of analytic continuity, to a large extent, questions in this survey matched questions asked in the 2014 Eugene-Springfield Metropolitan Area Travel Barriers and Benefits Survey, enabling comparisons across time. New questions added to this survey are indicated with asterisks and were added in recognition of evolutions to travel since the 2014 survey. It should be noted that the geographic scope of the 2014 survey differed slightly from the 2020 survey: the 2014 survey was specific to the Eugene and Springfield City Limits while the 2020 survey encompassed the entire Central Lane TMA.

The 2020 Central Lane Metropolitan Planning Organization Travel Barriers and Benefits Survey was conducted amidst the COVID-19 global pandemic and the resulting Stay at Home Orders, which have had profound impacts on travel behaviors in the TMA. Respondents were asked to report on their own travel behavior prior to COVID-19 and the Stay at Home orders in Oregon.

Statement of Limitations: Any sampling of opinions or attitudes is subject to a margin of error. The margin of error is a standard statistical calculation that represents differences between the sample and total population at a confidence interval, or probability, calculated to be 95%. This means that there is a 95% probability that the sample taken for this study would fall within the stated margin of error if compared with the results achieved from surveying the entire population. The margin of error for this survey is +/- 4.9%.

DHM Research Background: DHM Research has been providing opinion research and consultation throughout the Pacific Northwest and other regions of the United States for over 40 years. The firm is nonpartisan and independent and specializes in research projects to support public policy making.



2. SUMMARY OF OBSERVATIONS

Expanding bus transportation, reducing traffic congestion, and improving road conditions are the top transportation issues for residents of the Central Lane Transportation Management Area.

- When it comes to the combined areas of Eugene and Springfield only, expanding bus transportation and reducing traffic congestion have grown as priorities since 2014, while improving road conditions has remained a steady concern.
- 31% of residents in the TMA prioritized expanding bus transportation.
- 19% of residents in the TMA prioritized reducing traffic congestion.
- 18% of residents in the TMA prioritized improving road conditions.

Driving alone is the most frequently used mode of transportation followed by driving with others in the household and walking.

- Among those who drive alone, freedom (44%) and need (39%) are the primary motives.
- Information about health and environmental benefits (47%), along with difficulty parking (46%), are the most influential factors in getting people to use alternatives to driving alone.

The top reasons people bike and walk for transportation are for enjoyment and for health benefits.

- Shopping (83%) and visiting friends (30%) are the most common reasons for non-recreational biking, while shopping (80%) and eating out (30%) are the most common reasons for walking.
- Among those who bike or walk monthly or less often, approximately half would like to bike and walk more often.

There is a desire among some residents to bike or walk more often for transportation purposes.

- Those who would like to bike more often say they would do so if:
    - Quality bike parking were available (77%)
    - Bike lanes were available or more connected (76%)
    - Stores and services were closer to where they lived (72%)
    - They felt safer on the roads (72%)
    - They knew more about local bike routes (58%)
    - They had access to an e-bike (48%)
- Those who would like to walk more often say they would do so if:
    - Stores and services were closer to where they lived (85%)
    - Sidewalks in their area were better connected (67%)
    - They felt safer walking along and crossing the street (63%)
    - There were fewer hills in their neighborhood (26%)

The top reasons people ride the bus are limited car access, financial considerations, and enjoyment.

- Shopping (70%) and entertainment (46%) are the most common destinations for bus riders
- Among those who ride the bus monthly or less often, approximately one in three would like to bus more often.

There is a desire among some residents to ride the bus more often for transportation purposes.

- Those who would like to bus more often say they would do so if:
    - Buses came more frequently (92%)
    - There were better connections to and from transit stops (92%)
    - They could rely on buses to be on time (82%)
    - They knew it would cost less than driving (78%)
    - There were a county-wide bus service for longer commutes (77%)
    - They felt personally safer (77%)
    - Buses were more comfortable (61%)
- Among Eugene and Springfield residents who would like to bus more often, Eugene residents (81%) are more likely than Springfield residents (68%) to say a county-wide bus service would be a motivator.

Some residents are interested in programs that promote multimodal transportation options.

- Approximately half of residents are interested in programs to promote: electric vehicle use (54%), bike sharing and electric-assist bikes (49%), and electric scooters (44%).

Nearly half of residents believe telecommuting for work and school are more likely in the future.

- Of residents (46%) who believe telecommuting will be more likely in the future, the belief is higher among students (83%), residents age 35-54 (61%), and those with children in the household (59%).
- Approximately half (48%) would prefer to telecommute, with a stronger preference among adult students (78%) and residents under age 55 (60%).
- Among those who prefer telecommuting, more than eight in ten (82%) would like to do so several times a week or more.

3. KEY FINDINGS

3.1. Transportation Priorities

Respondents were asked, unprompted, what they felt were the most important issues in the Eugene-Springfield area that they would like their local government leaders to address (Q1).

Table 1
Most Important Transportation Issues

Response Category	Eugene N=361	Springfield N=115	Rest of Area N=25	Central Lane TMA N=502
Expand bus transportation system	34%	22%	38%	31%
Improve traffic congestion	20%	19%	14%	19%
Improve road conditions	16%	25%	17%	18%
Increase bike accessible areas / bike lanes	9%	7%	5%	8%
Improve Beltline	7%	4%	7%	7%
Improve road safety	5%	12%	6%	6%
Safety on buses / terminals	6%	4%	4%	6%
Don't see any problems / issues	4%	5%	7%	4%
More affordable / free buses	4%	6%	4%	4%
Better sidewalks / pedestrian paths	4%	5%	3%	4%
Bicycle safety	3%	3%	1%	3%
Reduce pollution / alternative fuels	1%	2%	3%	1%
More parking	1%	1%	1%	1%
Bike, e-bike, e-scooter share	1%	-	-	1%
Carpool options	*	-	1%	*
None / Nothing	7%	9%	10%	8%
All other responses	-	-	-	-
Don't know	2%	3%	2%	2%

Source: DHM Research (July 2020) and LCOG
Note: Percentage less than 0.5 printed as *

In the Central Lane TMA, **expanding bus transportation** (31%) was the number one reported transportation issue. Overall, other top mentions included **improving traffic congestion** (19%), **improving road conditions** (18%), and **increasing bike accessible areas / bike lanes** (8%).

By Area:

Eugene and Springfield residents share the same top transportation priorities, but they rank them differently. Eugene's residents prioritized **expanding bus transportation** (34%), **reducing traffic congestion** (20%), and **improving road conditions**. Springfield's residents prioritized **improving road conditions** (25%), **expanding bus transportation** (22%), and **reducing traffic congestion** (19%).

Demographic Differences:

Residents with incomes less than $50K (40%) were more likely to prioritize **expanding bus transportation** than those making over $100K (18%), while those in higher income brackets were more likely to prioritize **improving road conditions** than those making less than $50K. Residents aged 35-54 were more likely than

residents over 55 to prioritize **increasing bike accessible areas / bike lanes** and **better sidewalks / pedestrian lanes**, as were residents with incomes over $100K compared with those making under $100K.

3.2. Proximity to Work and School

Respondents were asked how frequently they commute to work or school between urban and rural areas within Lane County (Q2).

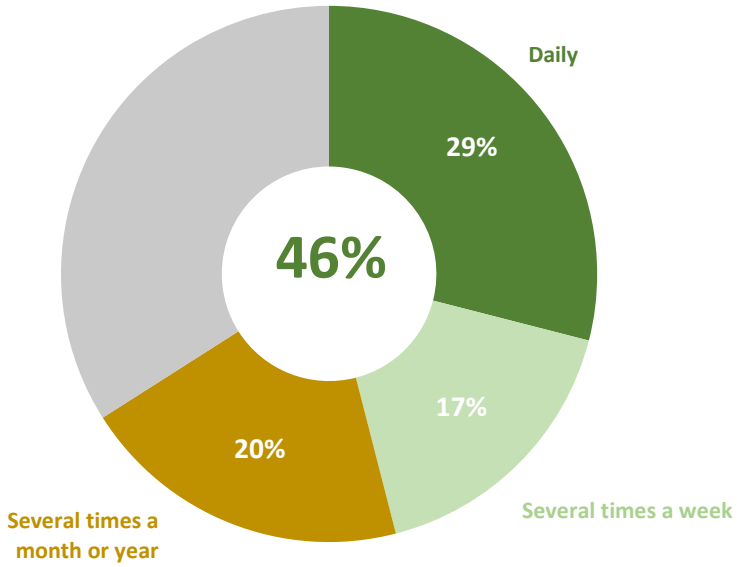
Table 2
Frequency of Commute Between Urban and Rural Areas

Response Category	Eugene N=361	Springfield N=115	Rest of Area N=25	Central Lane TMA N=502
Daily	28%	30%	23%	29%
Several times a week but not every day	16%	18%	21%	17%
Several times a month	11%	4%	6%	9%
A few times a year	10%	13%	5%	11%
Never	32%	31%	43%	32%
Don't know	2%	3%	1%	2%

Source: DHM Research (July 2020) and Lane Council of Governments (LCOG)

Almost half of residents (46%) say they are traveling to work or school between urban and rural areas at least several times a week.

Chart 1
Frequency of Commute Between Urban and Rural Areas



Source: DHM Research (July 2020) and LCOG

Respondents were then asked if they would live closer to their workplace if they were able to find an affordable place to live (Q3).

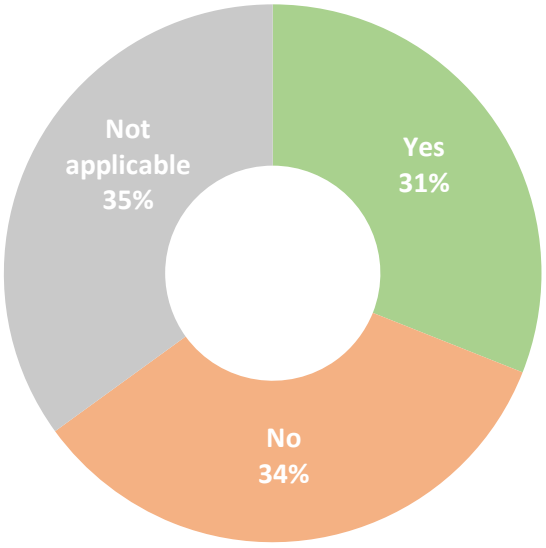
Table 3
Desire to Live Closer to Work

Response Category	Eugene N=361	Springfield N=115	Rest of Area N=25	Central Lane TMA N=502
Yes	32%	28%	26%	31%
No	34%	39%	40%	35%
Not applicable	33%	31%	33%	33%

Source: DHM Research (July 2020) and LCOG

About one third of residents (31%) would prefer to live closer to their workplace if they could find an affordable place to live.

Chart 2
Desire to Live Closer to Work



Source: DHM Research (July 2020) and LCOG

By Area:

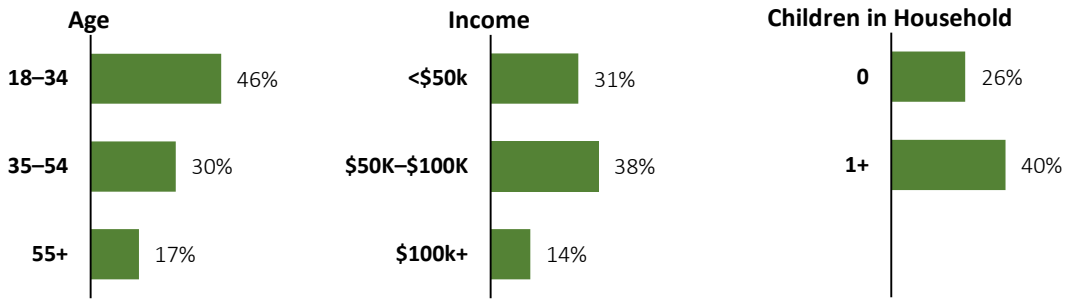
No statistically significant differences by area exist.

Demographic Differences:

Overall, young residents, residents with families, and residents in households earning $50-$100,000 are more likely to want to live closer to their workplaces.

Chart 3

Desire to Live Closer to Work by Age, Income, and Children in Household



Source: DHM Research (July 2020) and LCOG

3.3. Travel Behavior

Respondents were asked how often they used various modes of travel for transportation purposes (Q4-Q10).

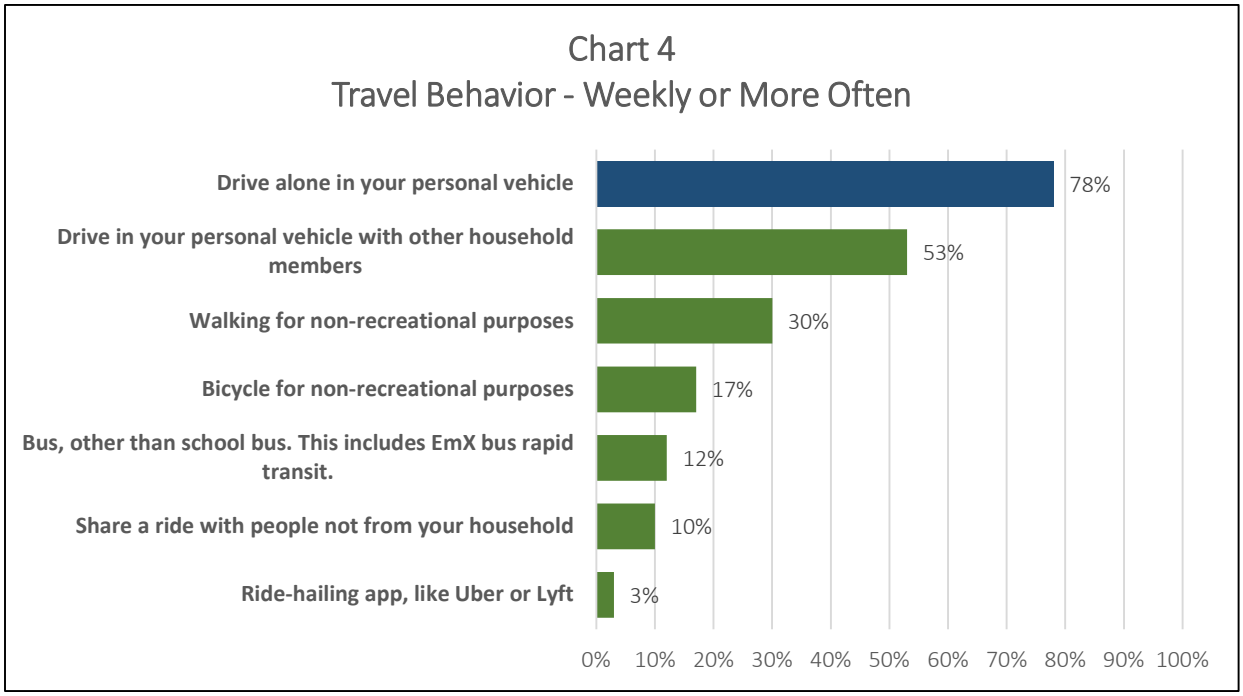
Table 4

Travel Behavior in the Central Lane TMA

Response Category	Daily	Several times a week but not every day	Several times a month	A few times a year	Never	Don't know
Drive alone in your personal vehicle	48%	30%	9%	4%	10%	<1%
Drive in your personal vehicle with other household members	18%	35%	19%	6%	22%	0%
Share a ride with people not from your household (example: Carpool or Vanpool)	3%	7%	18%	24%	47%	1%
Ride hailing app, such as Uber or Lyft (2014 Carsharing service: Flex car, Zipcar, Car2Go)	2%	1%	9%	29%	58%	1%
Bus, other than school bus. This includes EmX bus rapid transit	4%	8%	11%	24%	53%	<1%
Bicycle for non-recreational purposes such as to work, school, shopping, errands, etc.	9%	8%	10%	18%	54%	2%
Walking for non-recreational purposes such as to work, shopping, errands, etc.	12%	18%	19%	20%	31%	<1%

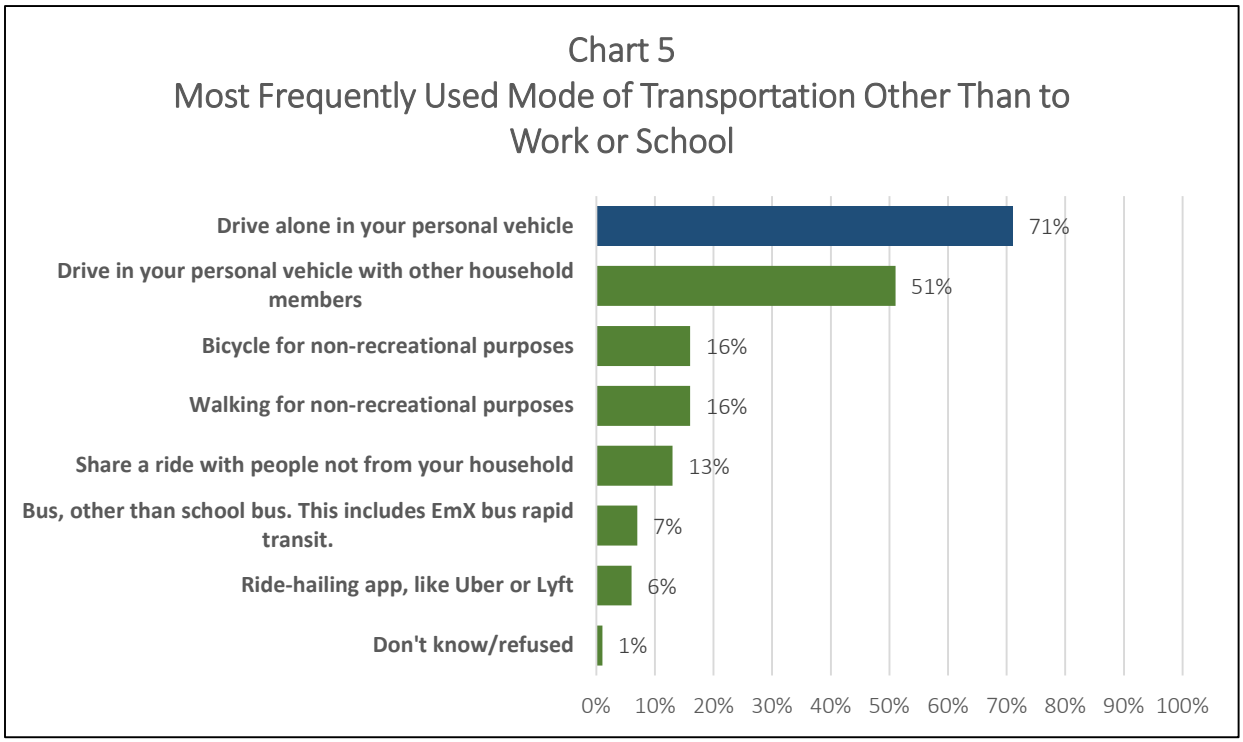
Source: DHM Research (July 2020) and LCOG

Overall, three in four (78%) Central Lane TMA residents **drive alone in their personal vehicle** weekly or more often, with half (48%) doing so on a daily basis. This was followed by **driving in a personal vehicle with other household members** (53%). **Walking** (30%), **biking** (17%), **taking the bus** (12%), and **sharing a ride with others outside of their household** (10%) distantly followed.



Source: DHM Research (July 2020) and LCOG

Next, respondents were asked to think about trips that they take, other than to work or school, and indicate the mode of transportation they most frequently use. They could indicate up to three modes (Q11).



Source: DHM Research (July 2020) and LCOG

Overall, six in ten (71%) **drive alone in their personal vehicle** most frequently for trips other than work and school. This is followed by **driving in personal vehicle with other household members** (51%). **Walking** (16%), **biking** (16%), **sharing a ride with others outside of their household** (13%), and **taking the bus** (7%), distantly followed.

By Area:

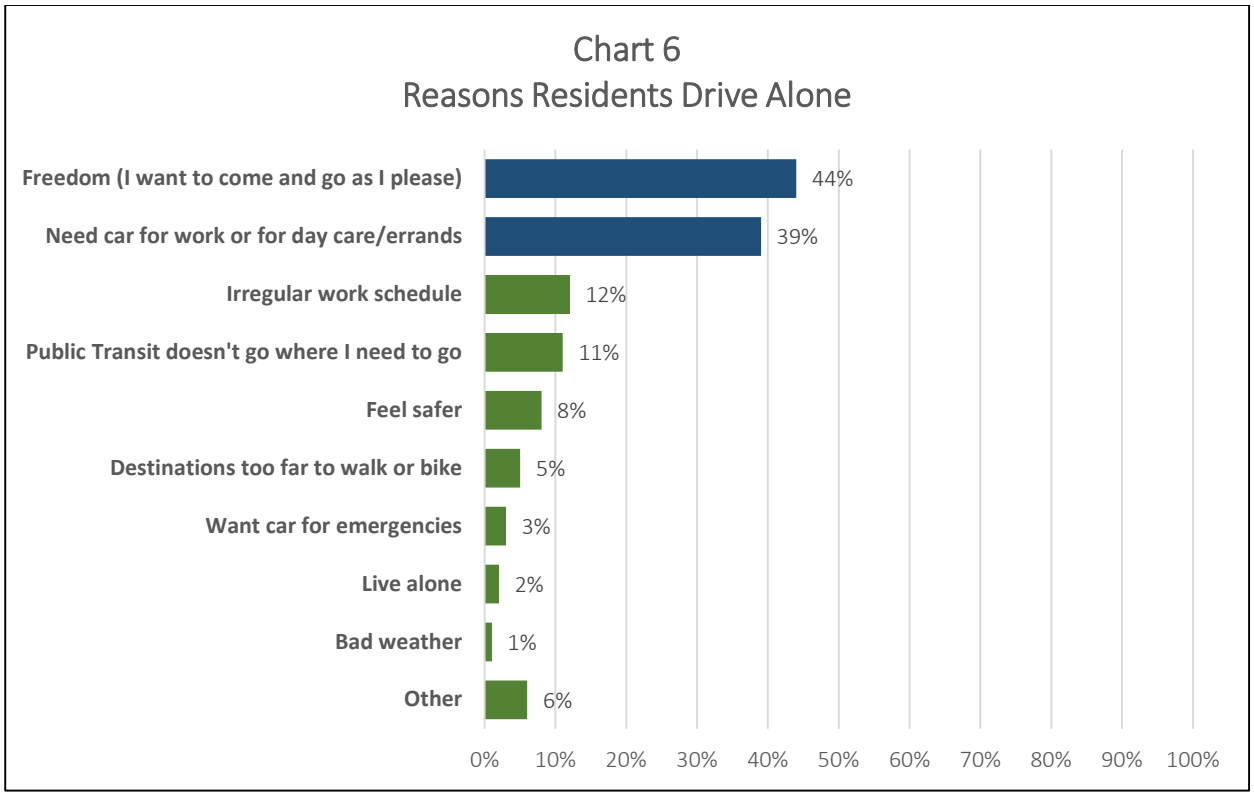
Eugene residents (16%) were more likely than those from Springfield (6%) to **share a ride with people not from their household**. Eugene residents were more likely than those in the TMA who live in neither Eugene nor Springfield to **walk** (19% vs, 5%) as a form of transportation; Eugene residents more likely than those in Springfield to **bicycle** (19% vs. 7%) as a form of transportation.

Demographic Differences:

Respondents under 55 are more likely than those 55 and older to **drive in their personal vehicle with other household members** (18-34: 59%; 35-54: 61%; 55+: 67%). Respondents ages 18-34 are also more likely than those 55 and older to use a **ride-hailing app, like Uber or Lyft** (18-34: 10%, 35-54: 6%, 55+: 2%).

Respondents from households making $50K or less were more likely than those from higher income households to use the **bus** (<$50K: 11%; $$50K-$100K: 5%; $100K+: 1%) and less likely to **drive alone** (<$50K: 57%; $$50K-$100K: 82%; $100K+: 77%) or **drive with other household members** (<$50K: 38%; $$50K-$100K: 61%; $100K+: 65%).

Respondents who drive alone as a form of transportation were asked, unprompted, for the reasons they drive alone (Q12).



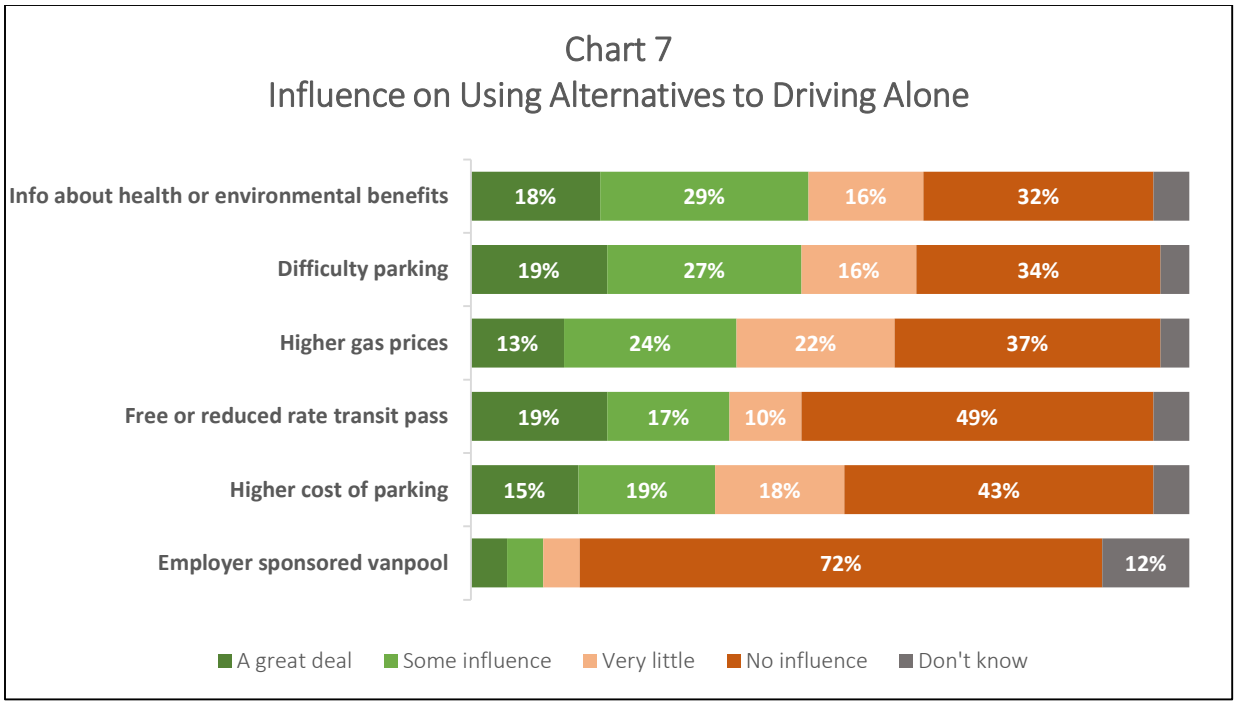
Source: DHM Research (July 2020) and LCOG

Top reasons for why respondents drive alone included **freedom** (44%) and **needing a car for work, day care, or errands** (39%). One in ten residents also mentioned an **irregular work schedule** (12%) or **public transit doesn't go where they need it to go** (11%) as reasons they drive alone.

By Area:
No statistically significant differences by area exist.

Demographic Differences:
Respondents 55 and older were more likely than those who are younger to cite an **wanting a car for emergencies** (18-34: 0%; 35-54: 1%; 55+: 7%) or **living alone** (18-34: 0%; 35-54: 0%; 55+: 6%) as reasons they drive alone. No other statistically significant demographic differences exist.

Respondents who use transportation options other than driving alone monthly or more frequently were asked how much influence various factors had on their decision (Q13-Q19).



Source: DHM Research (July 2020) and LCOG

Information about health and environmental benefits, as well as difficulty parking, are the biggest motivators when choosing alternatives to driving alone. Almost half (47%) reported that **information about health or environmental benefits** had a great deal (18%) or some (29%) influence on their decision to use alternatives to driving alone. Almost half (46%) also reported that **difficulty parking** had a great deal (19%) or some (27%) influence on their decision to use alternatives to driving alone. The second tier of influencers included **higher gas prices** (37%), **free or reduced rate transit passes** (36%), and **higher cost of parking** (34%). The **employer sponsored vanpool** was the least influential with 72% reporting it had no influence on their decision to use alternatives to driving alone. Other items that influenced decisions mentioned by respondents included **convenience, lack of a vehicle,** and **health benefits.**

By Area:

All influencers were consistent by area with the exception of **higher gas prices** and **information about health or environmental benefits.** Respondents in Eugene (63%) were more likely than those in Springfield (48%) to say **higher gas prices** had a little or no influence on their decision, while those living in Springfield (50%) as well as those living outside of Eugene or Springfield (49%) were more likely than respondents in Eugene (33%) to say this had a great deal or some influence. Respondents in Eugene (51%) were more likely than those in Springfield (36%) to cite **information about health or environmental benefits** as having a great deal or some influence, while respondents in Springfield (61%) were more likely than those in Eugene (44%) to say that this had little or no influence on their decision.

Demographic Differences:

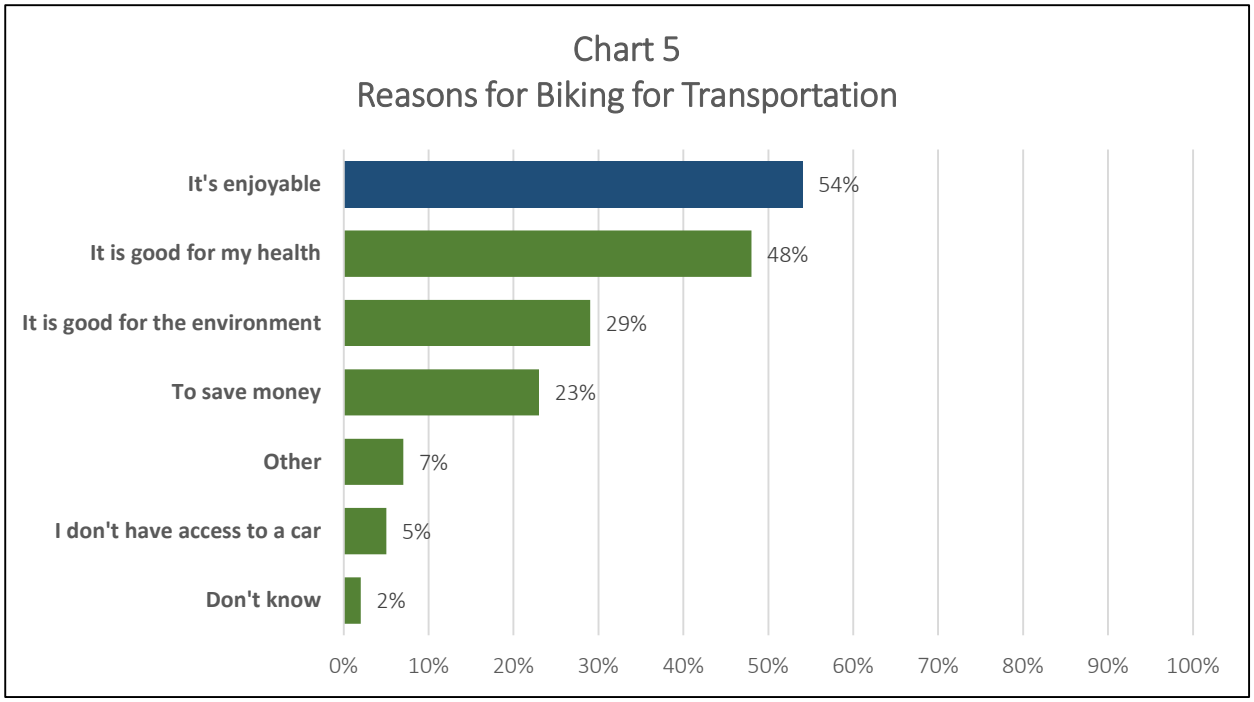
Those under age 55 were more likely to say that **difficulty parking** had a great deal or some influence (18-24: 55%, 35-54: 51%, 55+: 35%), while those 55 and older were more likely to say this had little or no influence (18-24: 41%, 35-54: 48%, 55+: 62%). Younger respondents, ages 18-34, were also more likely than those 55 and older to say that **higher cost of parking** had a great deal or some influence (18-24: 45%, 35-54: 32%, 55+: 26%), while those over 55 cited that this had little or no influence (18-24: 50%, 35-54: 64%, 55+: 72%).

Not surprisingly, those who bike (69%) or walk (66%) are more likely than those who drive alone (43%) or with others in their household (43%) to say that **information about health or environmental benefits** has a great deal or some influence. Those who drive alone (25%) or with others in their household (25%) are more likely than those who take the bus (3%) to say that **higher gas prices** have very little influence. Respondents who use raid-hail (46%) are also more likely than those who drive alone (46%), those who drive with others in their household (14%), those who bike (13%), and those who walk (10%) to say that **higher cost of parking** has a great deal of influence.

Respondents who ride the bus (79%) were more likely than those who use other modes (31-51%) to have been influenced by **free or reduced rate transit pass**. Respondents from households making less than $50K a year (49%) were more likely than those who make $100K or more (29%) to be influenced by **free or reduced rate transit pass**.

3.4. Biking

Respondents who bike monthly or more often were asked, open-ended, why (Q20).



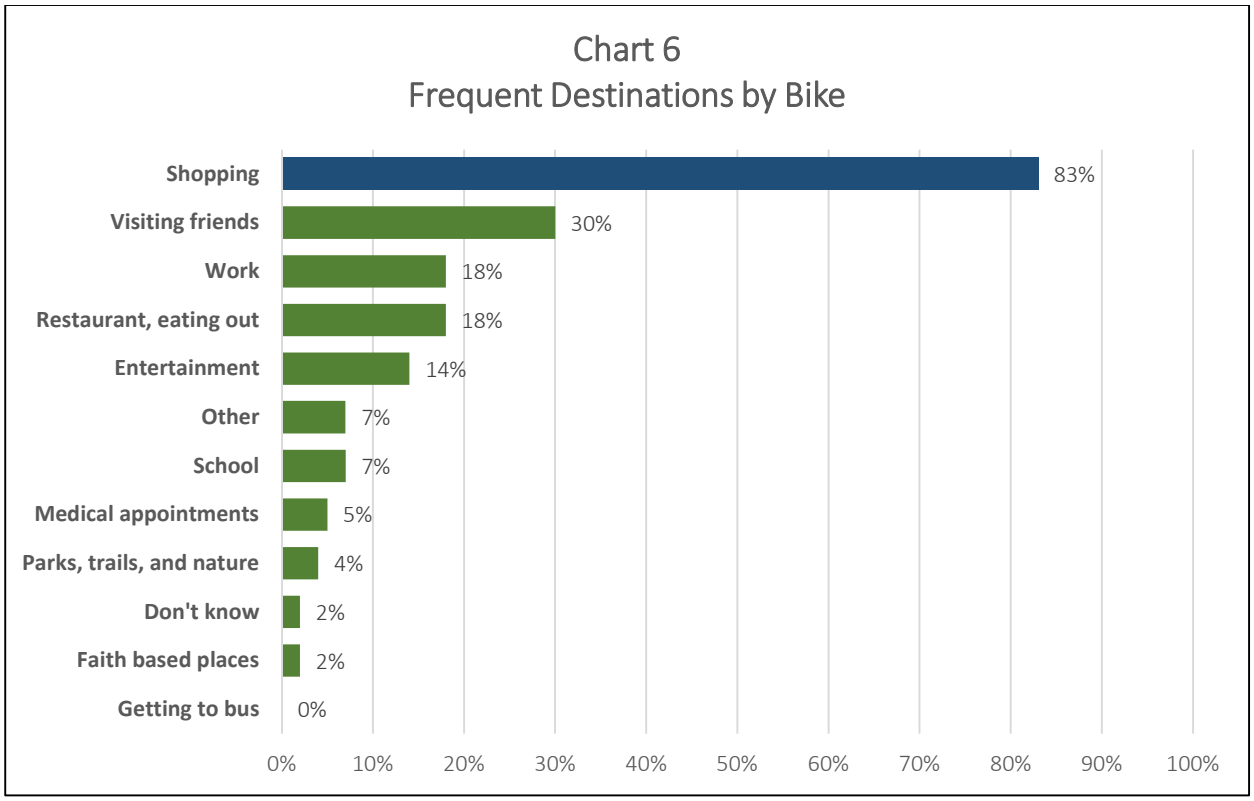
Source: DHM Research (July 2020) and LCOG

The top reason respondents gave for biking as a form of transportation was that **it's enjoyable** (54%). Nearly five out of ten (48%) bike because **it is good for their health**. Other reasons respondents bike as a form of transportation included **environmental benefits** (29%) and **to save money** (23%). All other reasons were mentioned by less than 10% of respondents.

By Area: Due to reduced sample size (Eugene, N=109; Springfield, N=15), there were no significant differences by area.

Demographic Differences: Women (55%) were more likely than men (44%) to bike because **it was good for their health**. Reasons respondents bicycle as a form of transportation showed no other significant differences among demographic subgroups.

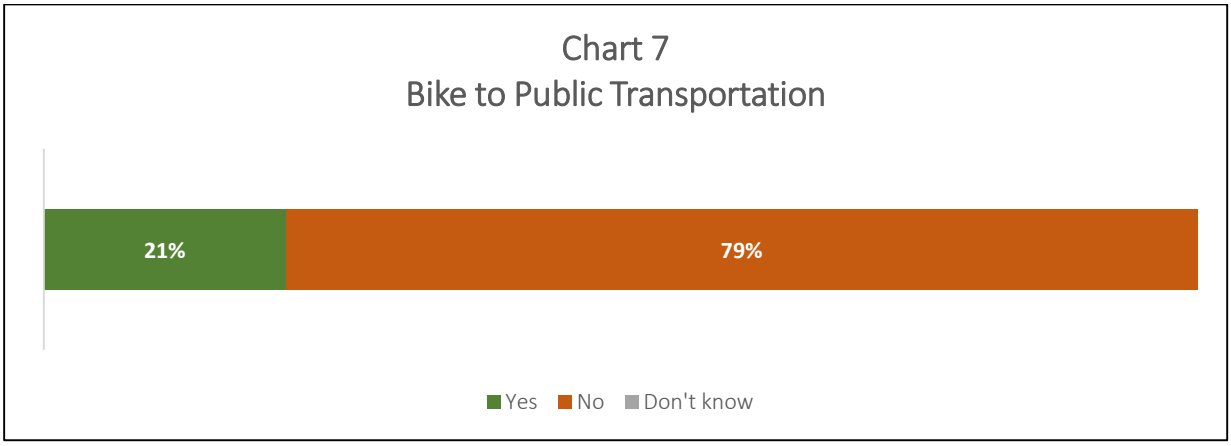
Respondents who used a bike most frequently as a form of transportation were asked where they typically go most often (Q21). Due to small sample size (N=132), analysis by area and demographic subgroups are not presented for this question.



Source: DHM Research (July 2020) and LCOG

The most frequent destinations for the majority of respondents (83%) was to go **shopping**. This was followed most closely by **visiting friends** (30%), **restaurants** (18%), **work** (18%), and **entertainment** (14%). All other destinations were frequented by less than 10% of participants.

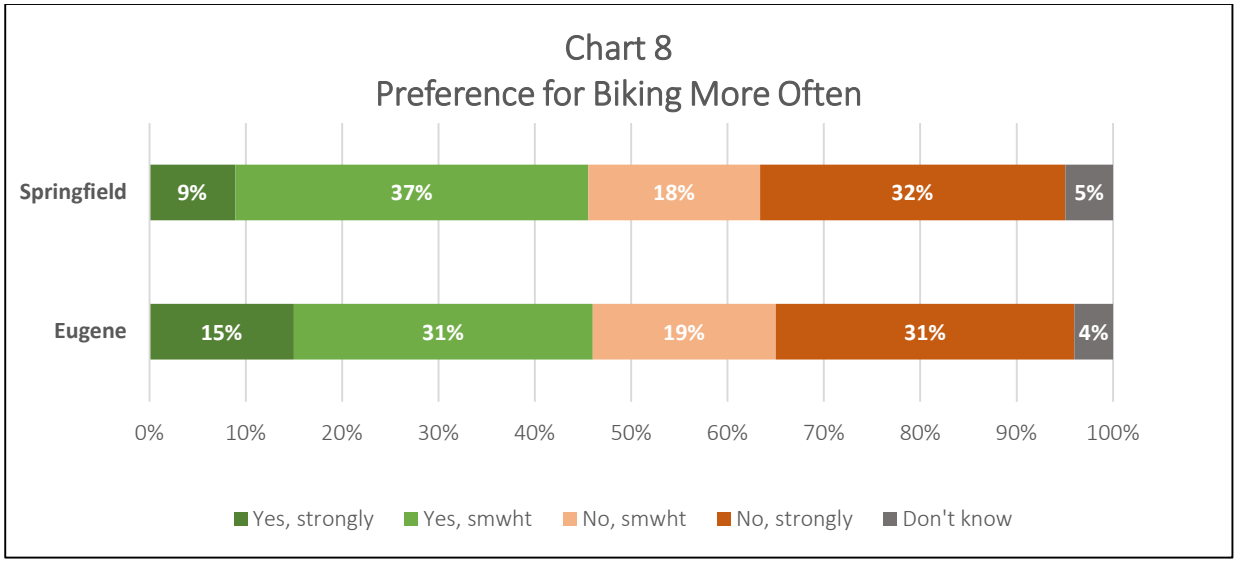
Respondents who used a bike most frequently as a form of transportation were asked if they ride their bike to or from public transportation (Q22). Due to small sample size (N=81) analysis by area and demographic subgroups are not presented for this question.



Source: DHM Research (July 2020) and LCOG

Most respondents have not biked to or from public transportation. Overall, 21% have biked to or from public transportation while nearly eight in ten (79%) have not.

Respondents who biked monthly or less often were asked if they would prefer to bike more often for transportation purposes (Q23).



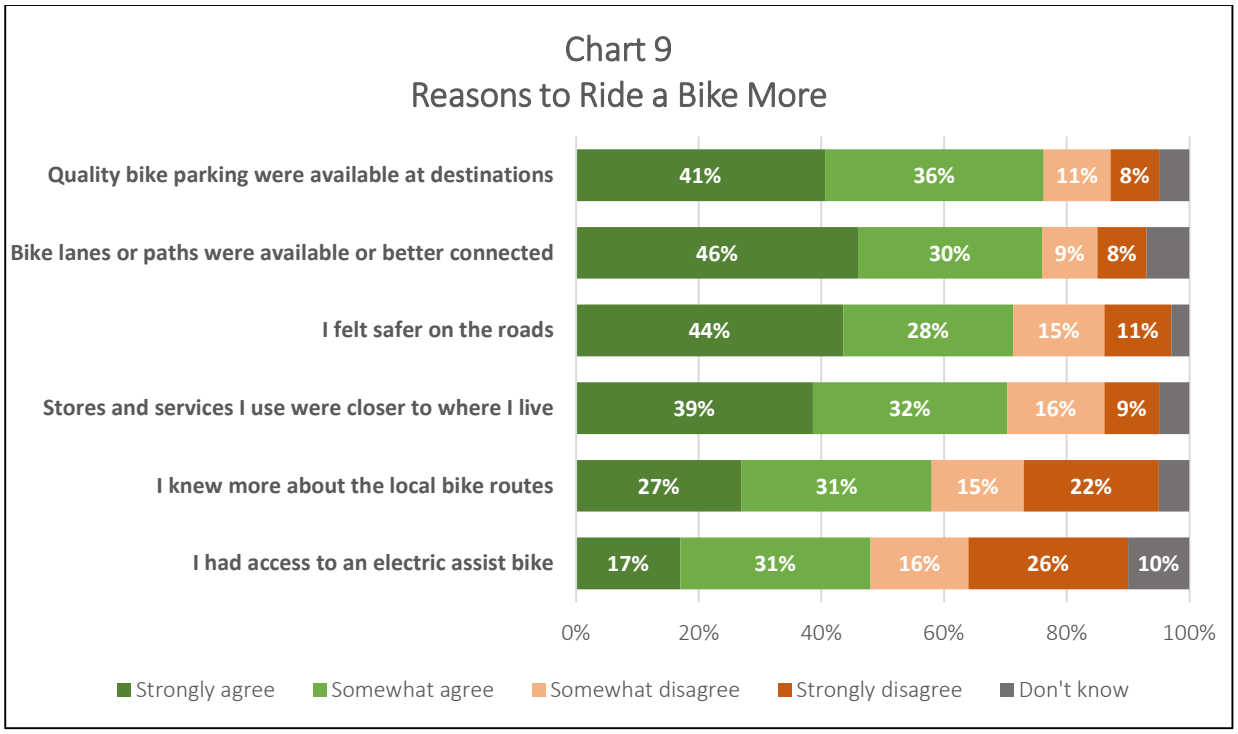
Source: DHM Research (July 2020) and LCOG

Overall, nearly five in ten (46%) would prefer to bike more often for transportation purposes, with 14% who felt this way strongly. Half of the respondents (50%) have little or no desire to bike more often.

By Area: No significant differences in preference to bike more often exist by area.

Demographic Difference: Respondents under the age of 55 are more likely to have a desire to bike more often than those who are older (18-34: 58%, 35-54: 51%, 55+ 32%). Respondents who live in households making more than $50K per year are more likely to have a desire to bike more often than those making less than $50K per year (<$50K: 40%, $50K-$100K: 49%, >$100K: 56%).

Those who would like to bike more for transportation purposes were read a list of reasons why people may bike more. They were asked to rate their agreement with each of the following statements (Q24-Q29).



Source: DHM Research (July 2020) and LCOG

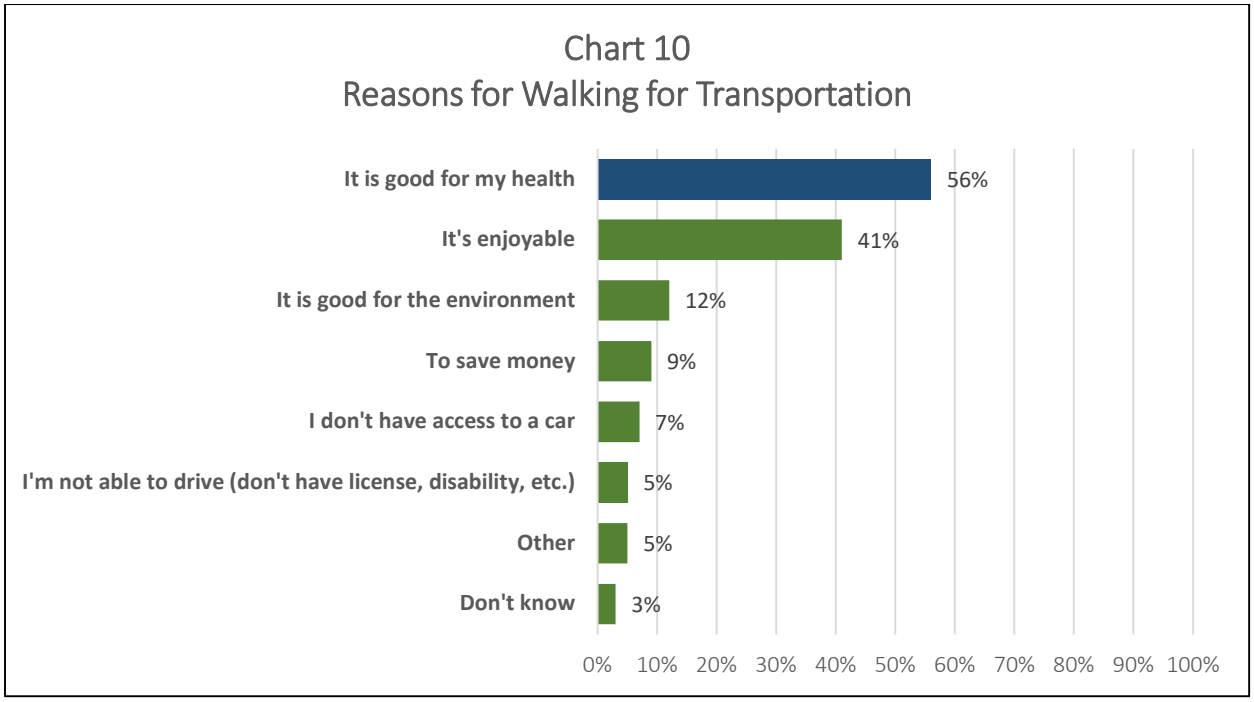
Quality bike parking were available at destinations (77% strongly agree or somewhat agree), and **Bike lanes paths were available or better connected** (76%) are the number one deterrents to riding a bike for transportation. This is followed closely by **I felt safer on the roads** (72%), and **Stores and services I use were close to where I live** (71%). Less important items include **I knew more about the local bike routes** (58%), and **I had access to an electric assist bike** (48%).

By Area: Due to small sample sizes within the regions in Eugene and Springfield, analysis by area is not presented.

Demographic Differences: Variables that would encourage respondents to bike more often were consistent across demographic subgroups.

3.5. Walking

Respondents who walk monthly or more often were asked, unprompted, why (Q31).



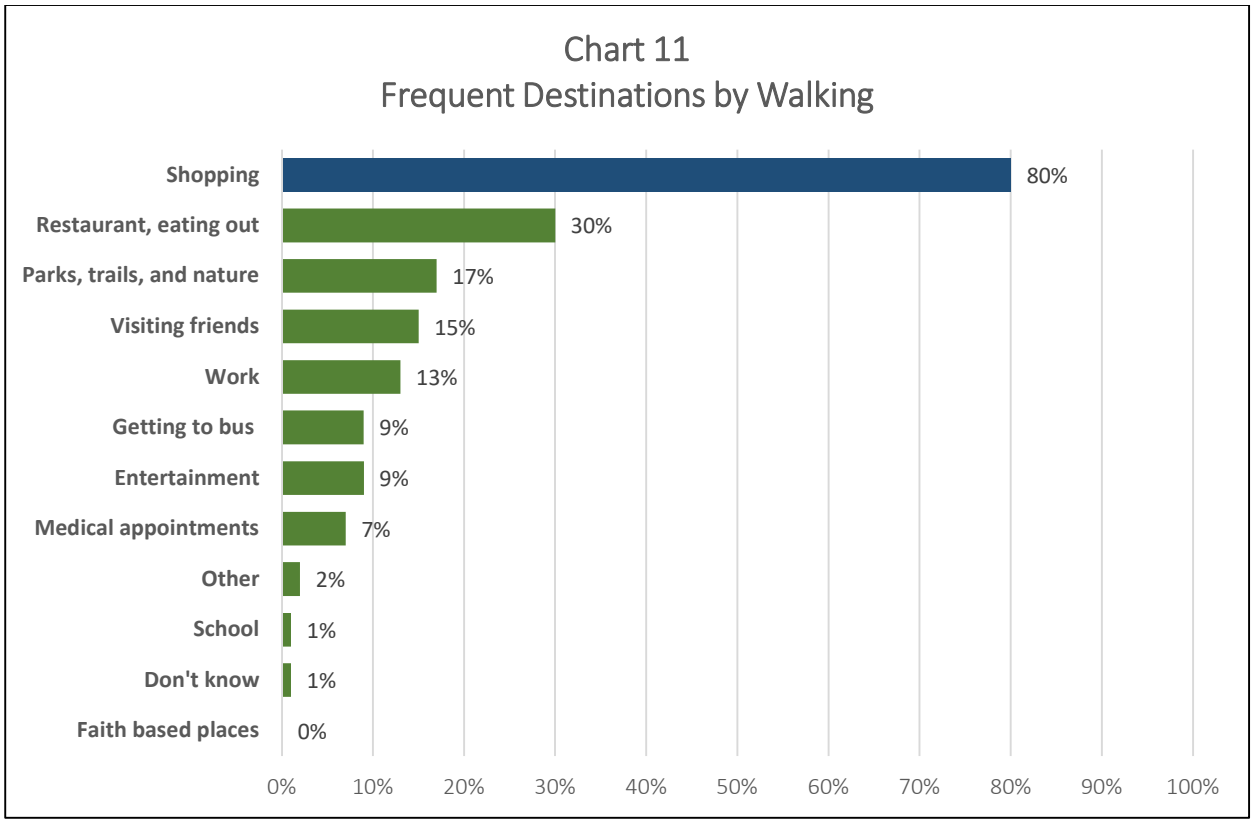
Source: DHM Research (July 2020) and LCOG

The top reason for walking for transportation was for **health benefits** (56%). The next biggest reasons were **it's enjoyable** (41%), **it is a good for the environment** (12%), and **to save money** (9%).

By Area: Results are similar by area with the exceptions of **health benefits** and **saving money**. For **health benefits,** respondents from Springfield (65%) were more likely than those from Eugene (53%). Respondents from Eugene (11%) were more likely than those from Springfield (0%) to walk as a form of transportation to **save money**. No other differences by area exist.

Demographic Differences: Reasons respondents walk for transportation were consistent across demographic subgroups.

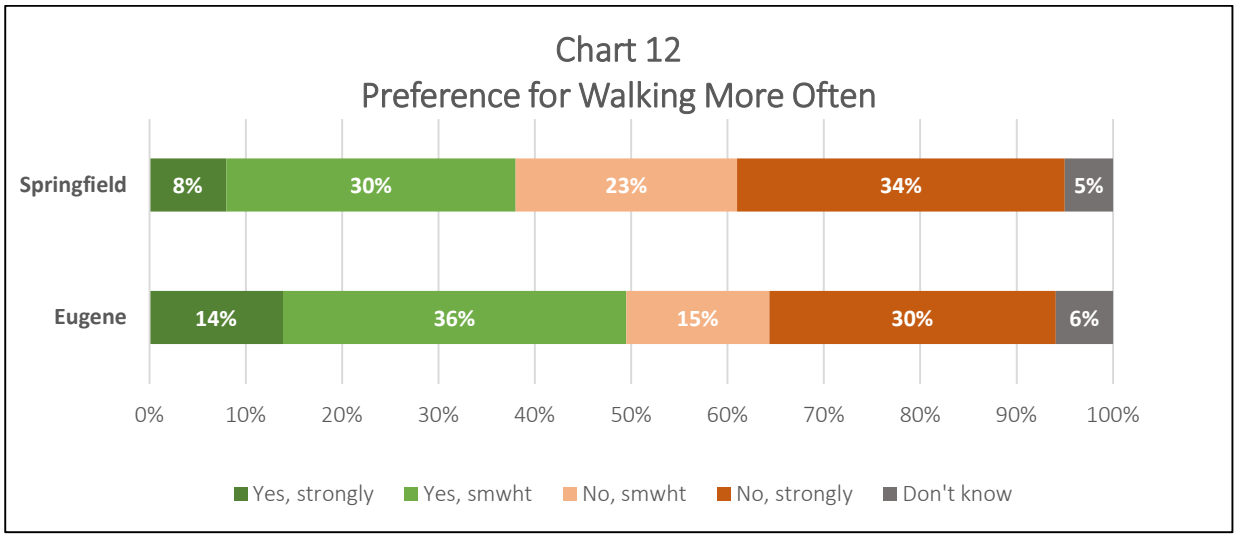
Respondents who walk most frequently as a form of transportation were asked where they typically go most often (Q32). Due to small sample size (N=82), analysis by area and demographic subgroups are not presented for this question.



Source: DHM Research (July 2020) and LCOG

Similar to those who bike for transportation, the most frequent destination for those who walk was **shopping** (80%). This was distantly followed by **restaurants** (30%), **parks, trails, and nature** (17%), **visiting friends** (15%), and **work** (13%). All other destinations were frequented by less than 10% of respondents.

Respondents who walked monthly or less often were asked if they would prefer to walk more often for transportation purposes (Q33).



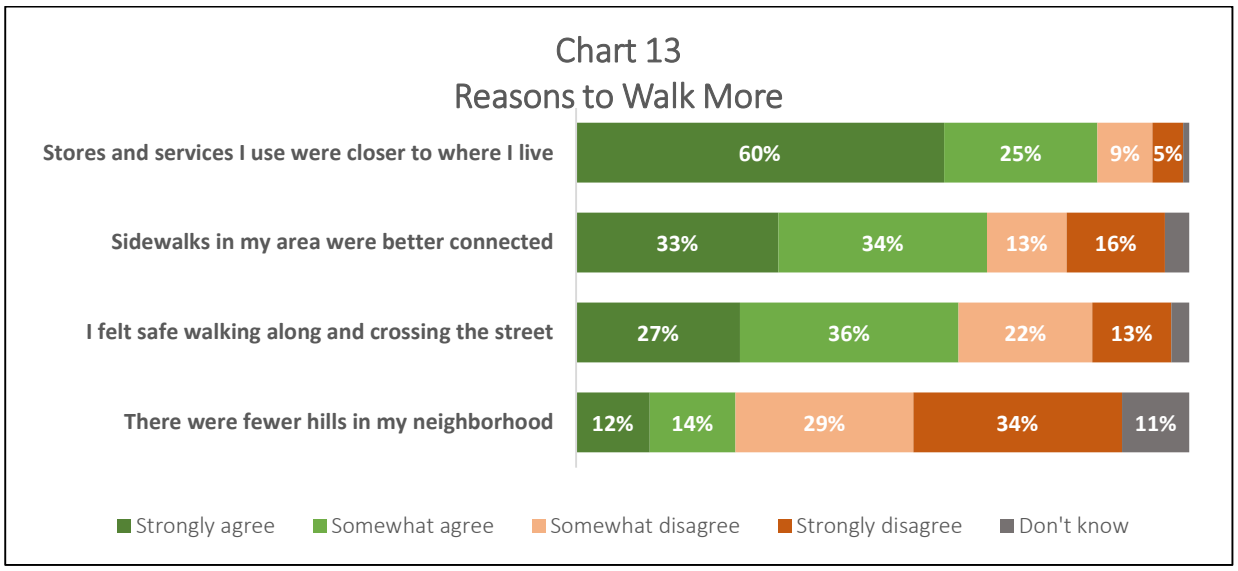
Source: DHM Research (July 2020) and LCOG

Overall, nearly half of respondents (47%) would prefer to walk more often for transportation purposes, with 13% who felt this way strongly. Nearly half of respondents (48%) do not have a desire to walk more often for transportation purposes.

By Area: Respondents from Springfield (56%) had a higher desire to not walk more often for transportation purposes compared to respondents from Eugene (45%).

Demographic Differences: Respondents ages 18-34 (59%) are more likely than ages 35-54 (47%) and 55+ (37%) to express a desire to walk more for transportation purposes. Respondents that make $100K or more (60%) are more likely than those making $50K-$100K (48%) and less than $50K (39%) to express a desire to walk more for transportation purposes. No other demographic differences exist.

Those who would like to walk more for transportation services were read a list of reasons why people may walk more. They were asked to rate their agreement with each of the following statements (Q34-Q37).



Source: DHM Research (July 2020) and LCOG

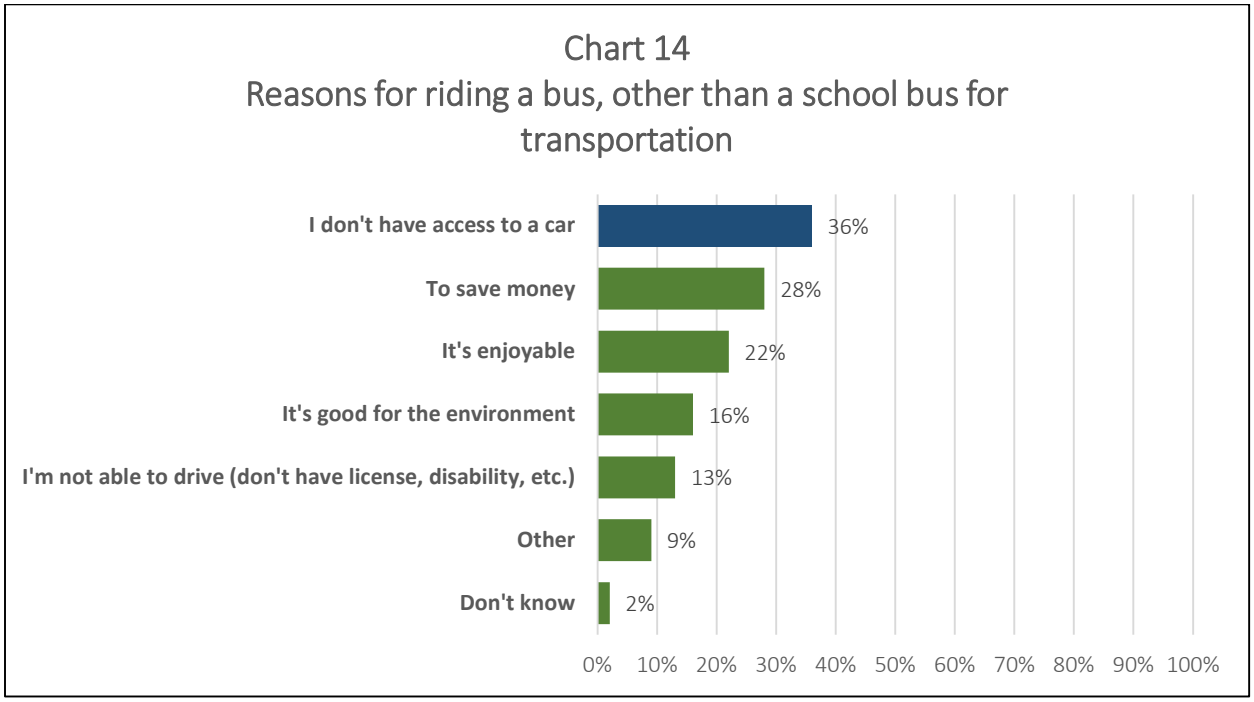
Respondents were more likely to walk more if **stores and services they use were closer to where they live** (85%). Other barriers to walking more often include **sidewalk connectivity** (67%) and **felt safe walking along and crossing the street** (63%). The barrier that had the lowest impact were **hills in their neighborhood** (26%).

By Area: Due to small sample sizes within the regions in Eugene and Springfield, analysis by area is not presented.

Demographic Differences: Variables that would encourage respondents to walk more often were fairly consistent across demographic subgroups.

3.6 Bus Ridership

Respondents who walk monthly or more often were asked, unprompted, why (Q39)

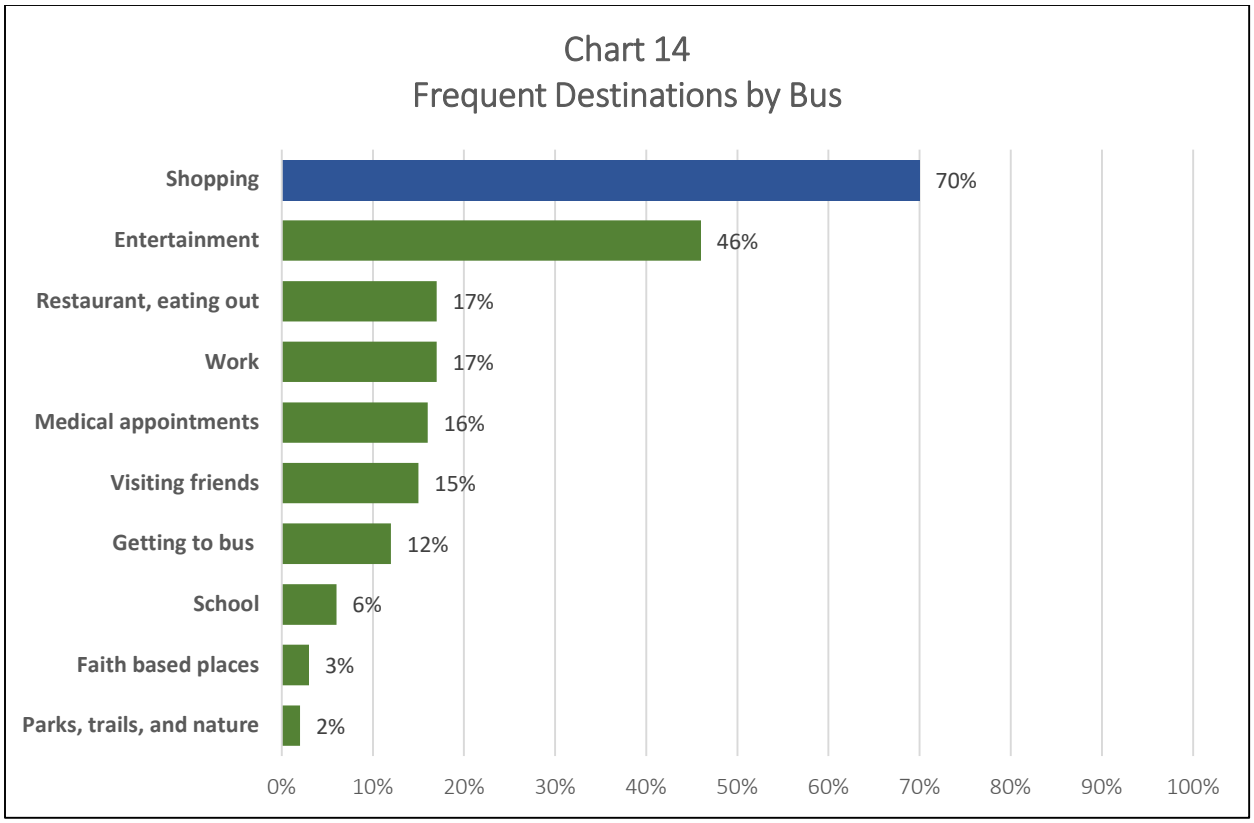


Source: DHM Research (July 2020) and LCOG

The top reason why respondents ride a bus, other than a school bus for transportation is because **they do not have access to a car** (36%). Other reasons include **to save money** (28%), **it's enjoyable** (22%), **environmental benefits** (16%), and **they are not able to drive** (13%).

Demographic Differences:

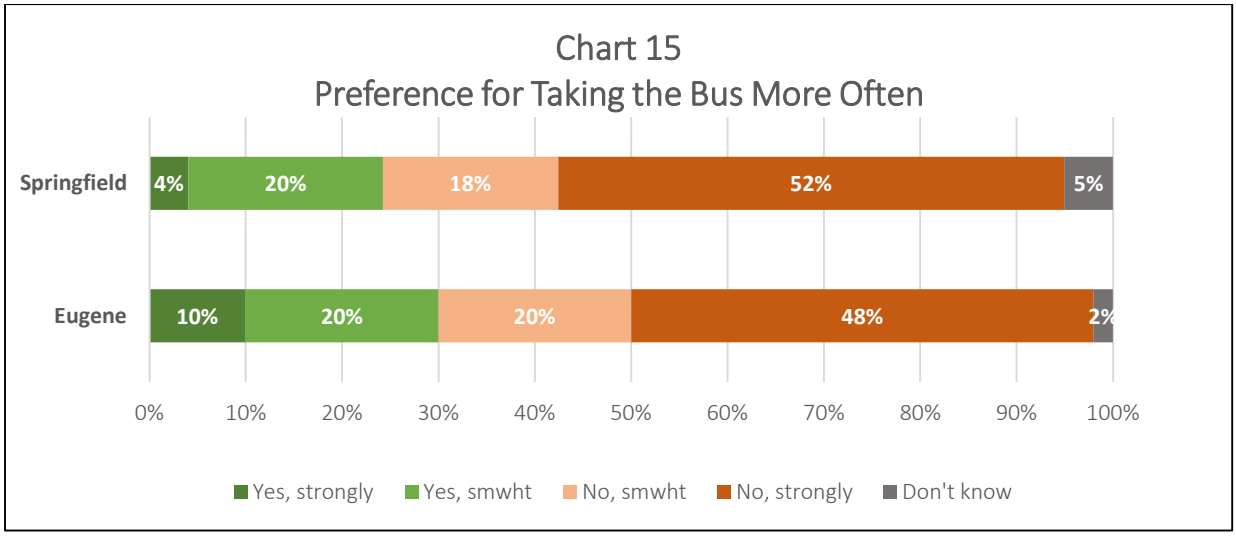
Respondents who frequently use the bus as a form of transportation were asked where they typically go most often (Q40).



Source: DHM Research (July 2020) and LCOG

Seven out of ten respondents that frequently use the bus a form of transportation use it for **shopping** (70%). This is followed by **entertainment** (46%), **restaurants** (17%), **work** (17%), **medical appointments** (16%), **visiting friends** (15%), and **getting to the bus** (12%).

Respondents who take the bus monthly or less often were asked if they would prefer to take the bus more often for transportation purposes (Q41).



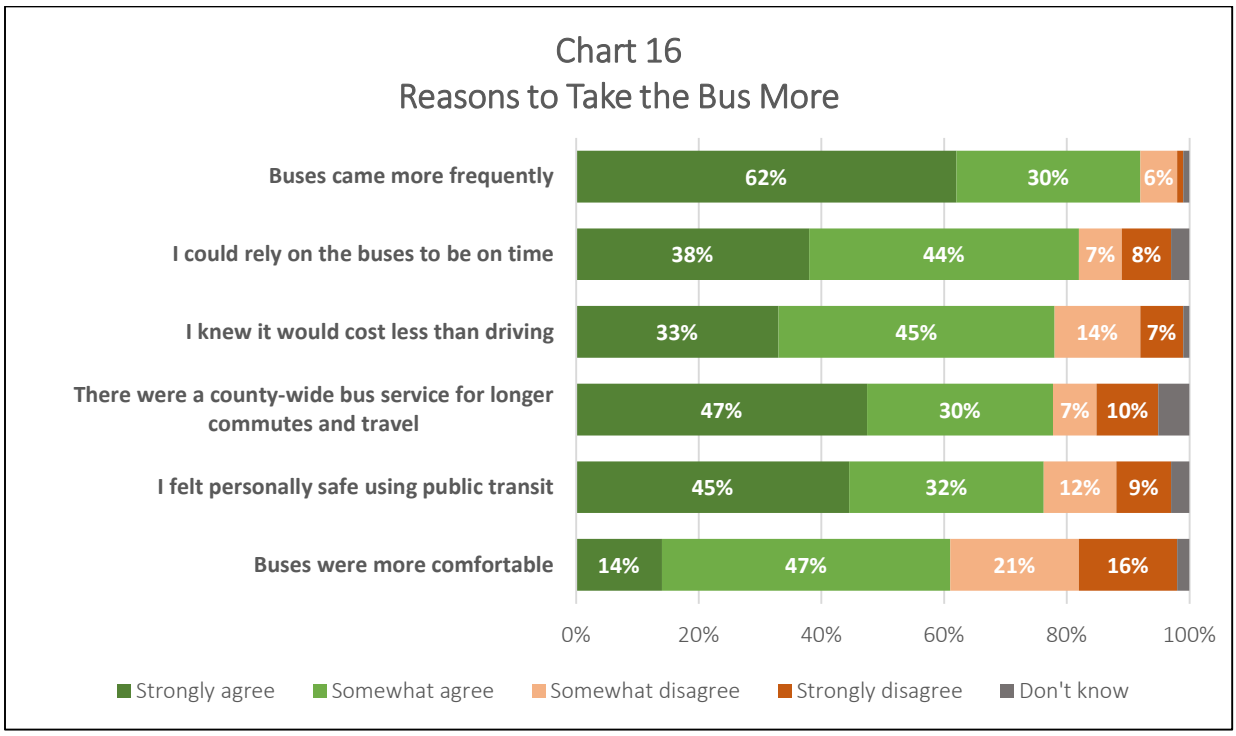
Source: DHM Research (July 2020) and LCOG

Overall, 69% of respondents would prefer to not take the bus more often as a form of transportation while a third (29%) of respondents would prefer to take the bus more often.

By Area: Respondents in Springfield (70%) and in Eugene (68%) had the same preferences to not take the bus more as a form of transportation. However, 10% of respondents from Eugene felt strongly about using the bus more as a form of transportation compared to 4% in Springfield that felt strongly about it.

Demographic Differences: Those with no children in their households (32%) are more likely than those with children in their households (20%) are more likely to want to ride the bus more.

Those who would like to take the bus more for transportation purposes were read a list of reasons why people may take the bus more. They were asked to rate their agreement with each of the following statements (Q42-Q48).



Source: DHM Research (July 2020) and LCOG

Buses came more frequently (92% strongly agree or somewhat agree) is the number one deterrent for why respondents do not use the bus. This is followed by **I could rely on the bus being on time** (82%), **I knew it would cost less than driving** (78%), **there were a county-wide bus service for longer commutes and travel** (77%), and **I felt safe using public transit** (77%). The least important factor was **buses were more comfortable** (61%).

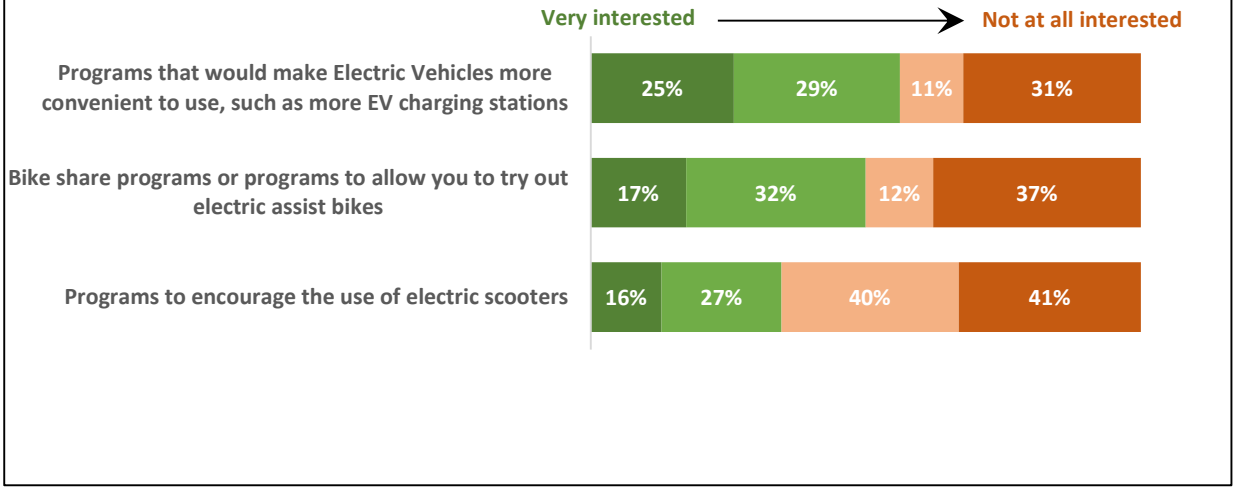
By Area: No statistically significant differences by area exist.

Demographic Differences: Older residents age 55+ (84%) are more likely to ride the bus if they felt more personally safe than younger residents age 18-24 (78%) and age 35-54 (65%).

3.7 Multimodal Transportation

Respondents were asked about their level of interest in three alternative transportation options (Q50-Q51).

Chart 17
Level of Interest in Alternative Transportation Options



Source: DHM Research (July 2020) and LCOG

Roughly half of residents are interested in programs to support Electric Vehicles (EVs), bike sharing, and electric scooters. Fifty-four percent of respondents are interested in **programs that would make EVs more convenient to use**, 49% are interested in **bike share programs**, and 43% are interested in **programs to encourage the use of electric scooters**.

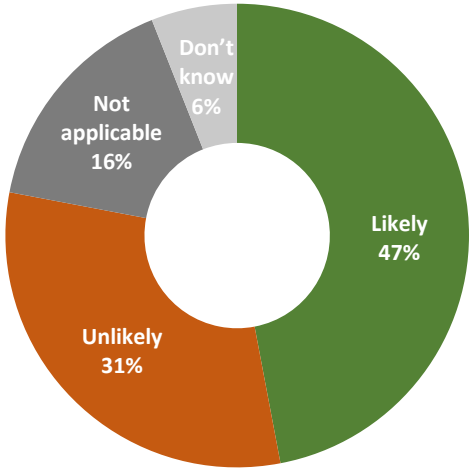
By Area:
No statistically significant differences by area exist.

Demographic Differences:
Not surprisingly, residents under 55 were more likely to show an interest than residents over 55 in **bike share programs** (18-34: 58%, 35-54: 52%, 55+: 38%) and **electric scooters** (18-34: 52%, 35-54: 48%, 55+: 31%). Residents who primarily bike (74%) and walk (71%) were more likely than those who drive alone (47%), drive with others in their household (53%), or take the bus (40%) to express interest in **bike share programs**, as were those who prefer to telecommute (60% vs. 44% among those who do not prefer to telecommute). Men (60%) were more likely than women (47%) to express interest in **electric vehicles**.

3.8 Telecommuting

Residents were asked if they thought the recent experience with COVID-19 and the state stay at home orders will make it more likely that telecommuting will be part of their future (Q53).

Chart 18
Future Telecommuting Likelihood



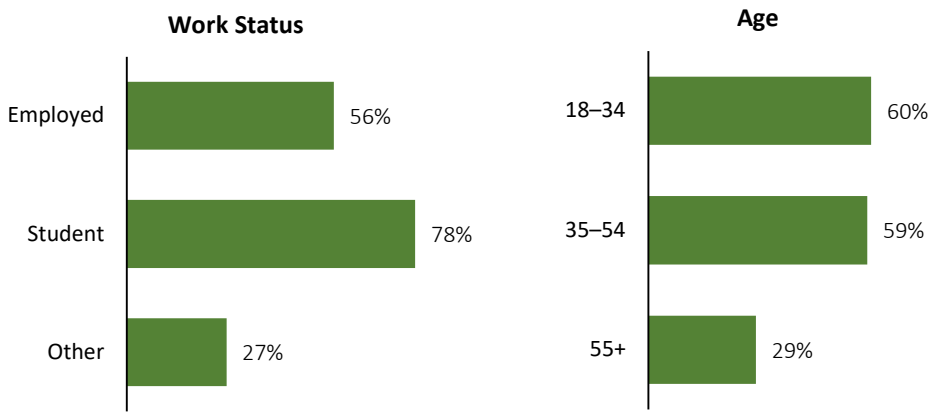
Source: DHM Research (July 2020) and LCOG

Nearly half (47%) of residents believe the recent experience with COVID-19 will make telecommuting for work and school more likely in the future.

Next, residents were asked if they would prefer to telecommute to work or school in the future at least some of the time, if given the option (Q54).

Chart 19

Telecommuting Preference

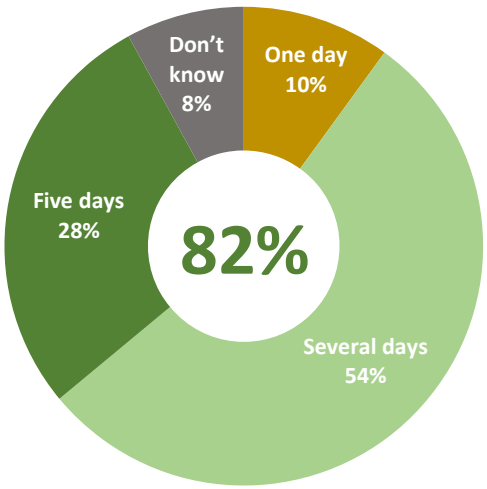


Source: DHM Research (July 2020) and LCOG

Residents who were currently employed (56%) or in school (78%) were more likely to prefer telecommuting, as were residents under age 55.

Those who preferred telecommuting were then asked how many days in a normal five-day work week they would prefer to telecommute to work or school (Q55).

Chart 20
Preferred Number of Days Telecommuting



Source: DHM Research (July 2020) and LCOG

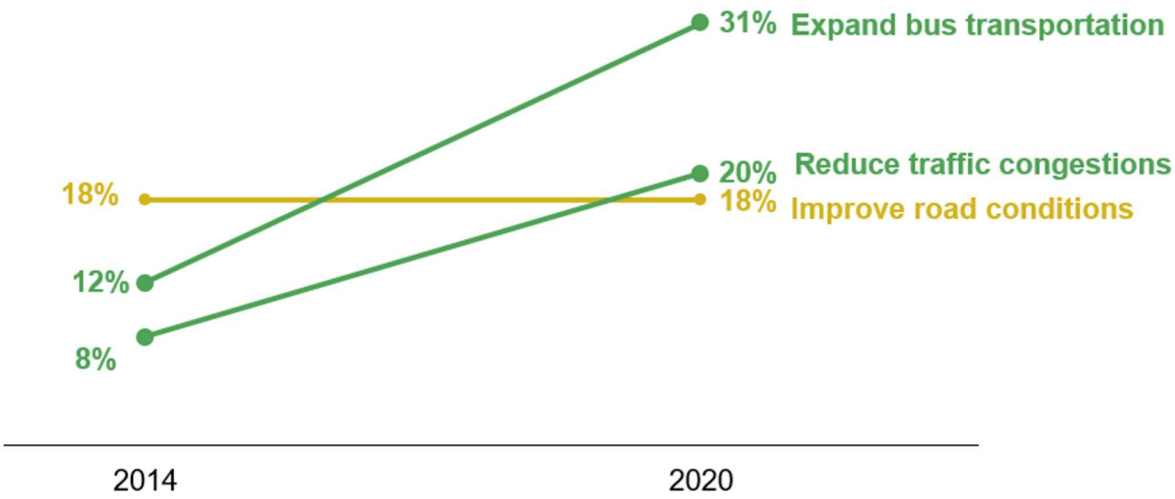
Among those who prefer telecommuting, about eight in ten would prefer doing so at least several days a week.

4. 2014-2020 COMPARISON

Among Eugene and Springfield residents, expanding bus transportation and reducing traffic congestion have grown as priorities since 2014.

Chart 21

Change Over Time in Priorities for Eugene and Springfield



Source: DHM Research (July 2020) and LCOG

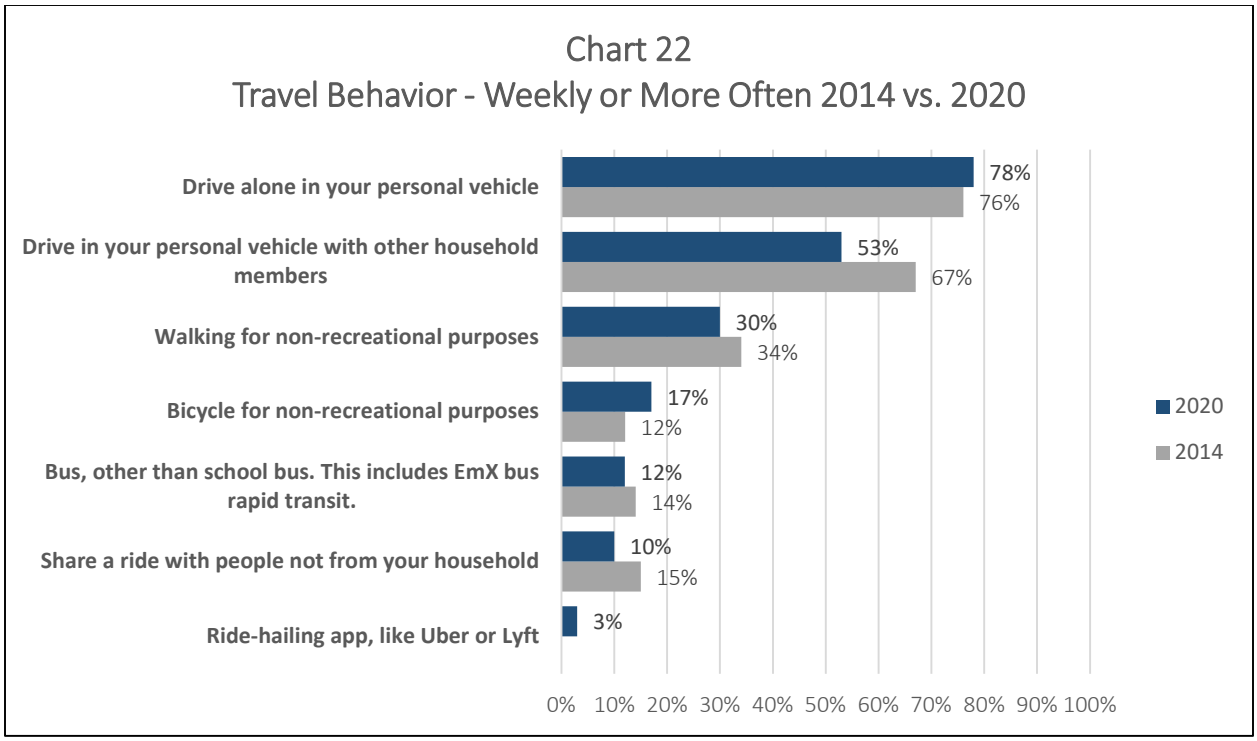


Chart 22
Travel Behavior - Weekly or More Often 2014 vs. 2020
Drive alone in your personal vehicle
78%
76%
Drive in your personal vehicle with other household members
53%
67%
Walking for non-recreational purposes
30%
34%
Bicycle for non-recreational purposes
17%
12%
Bus, other than school bus. This includes EmX bus rapid transit.
12%
14%
Share a ride with people not from your household
10%
15%
Ride-hailing app, like Uber or Lyft
3%
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
2020
2014

Chart 23
Most Frequently Used Mode of Transportation Other Than to Work or School 2014 vs 2020

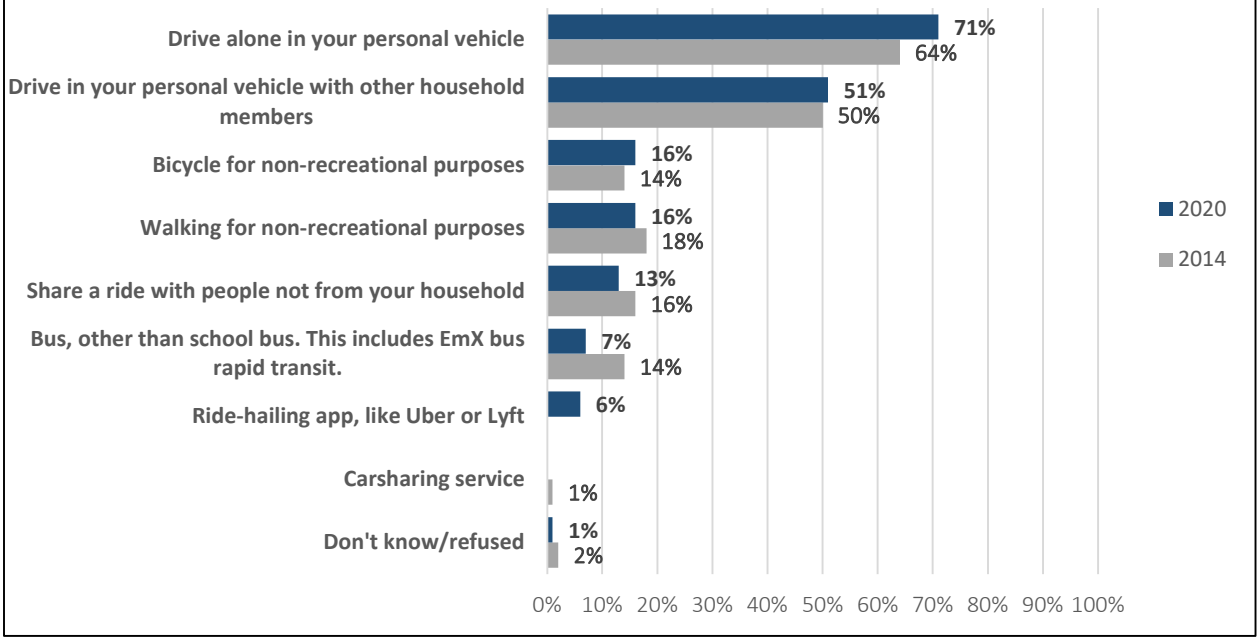
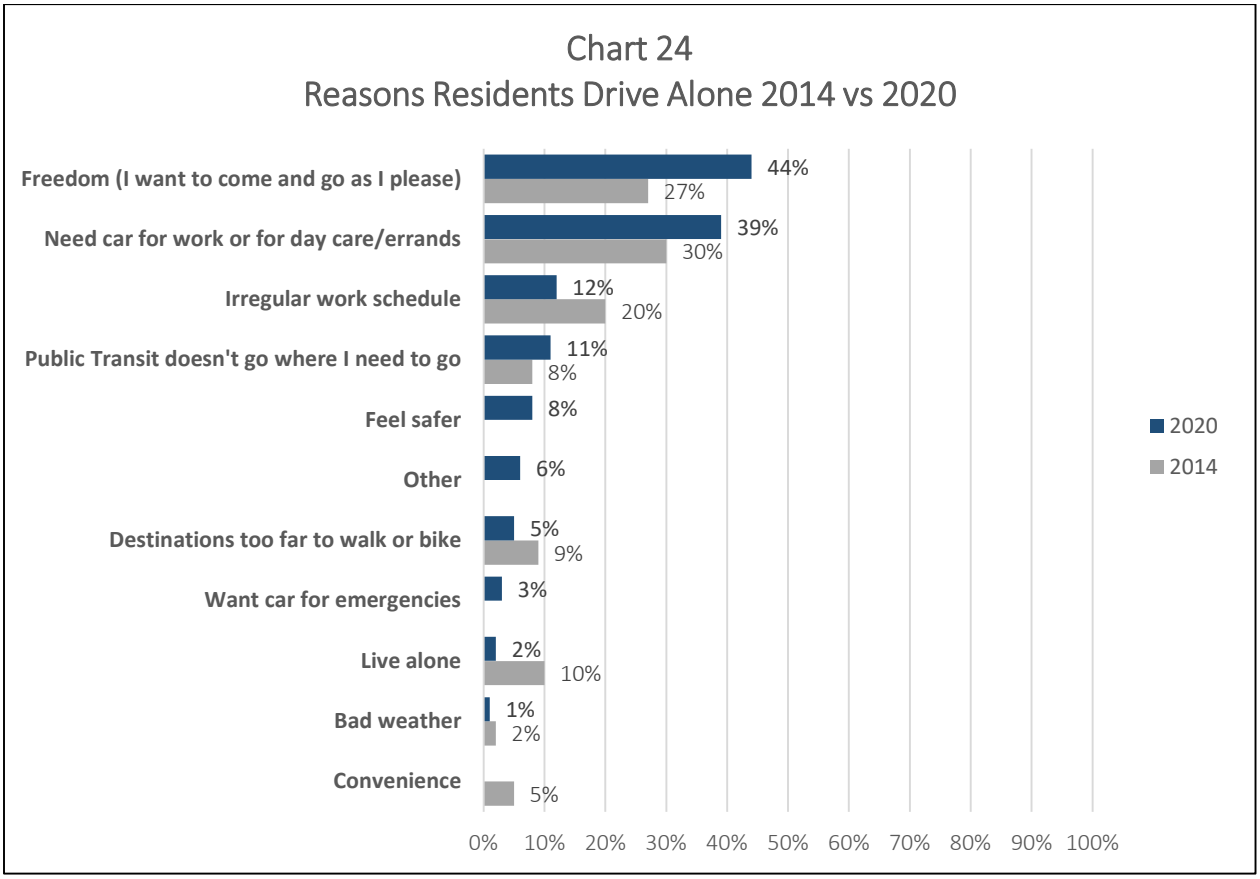
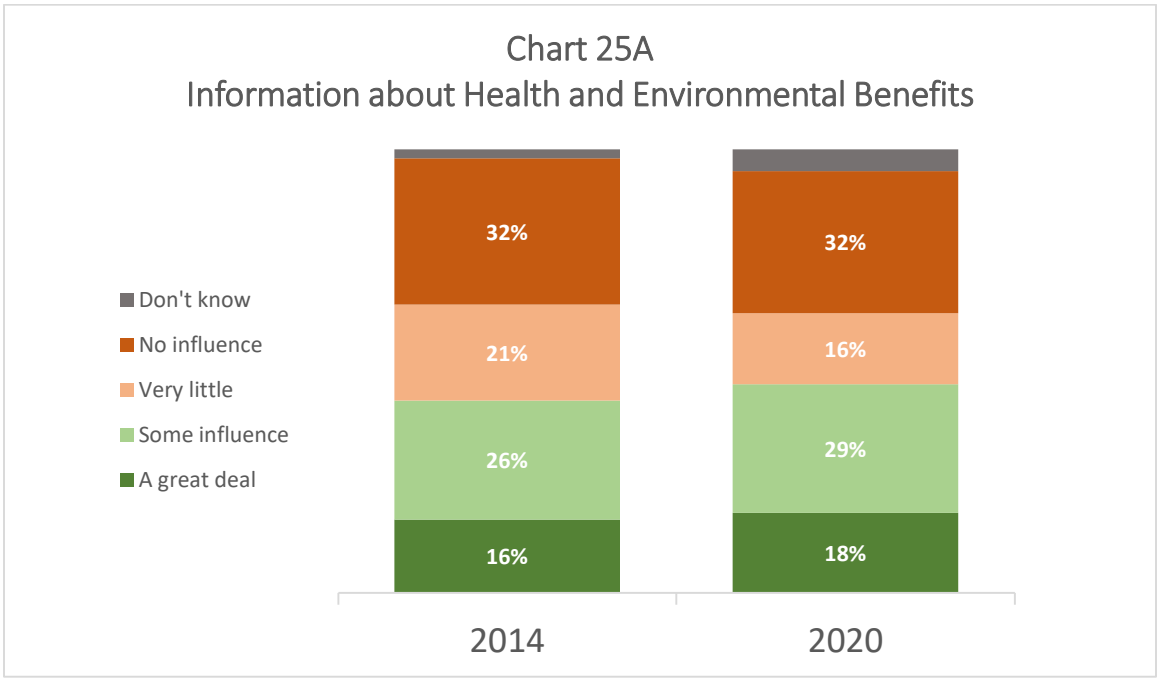
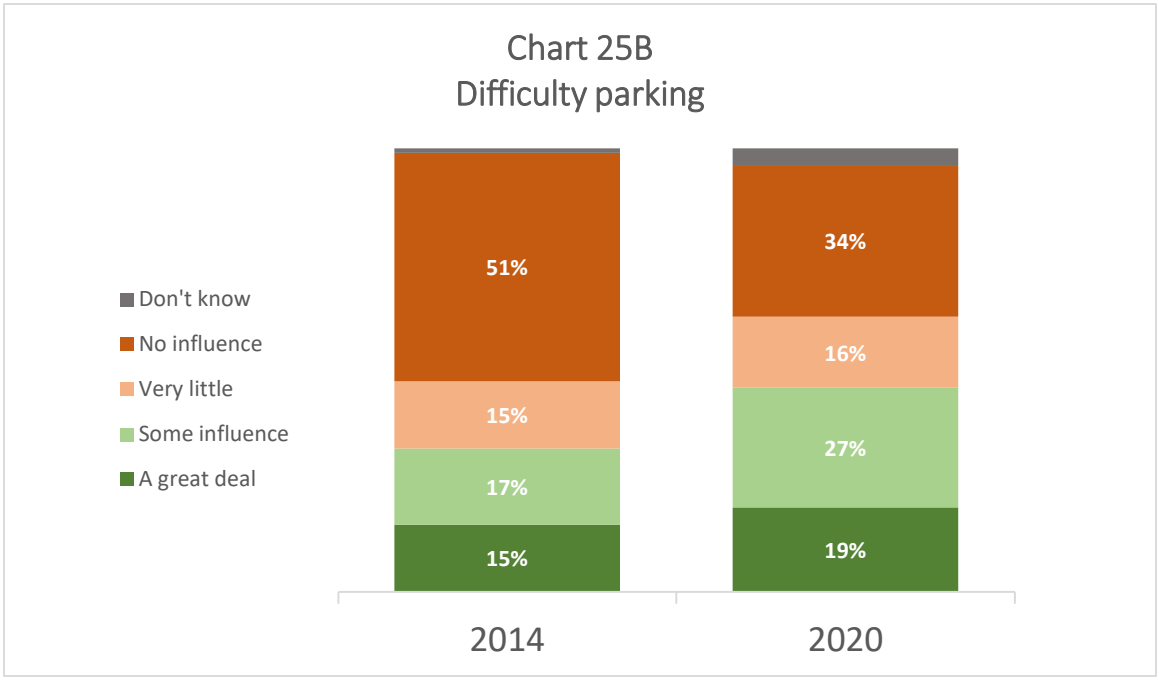


Chart 24
Reasons Residents Drive Alone 2014 vs 2020



The following Charts are comparing respondents **Influence on Using Alternatives to Driving Alone** from 2014 and 2020.





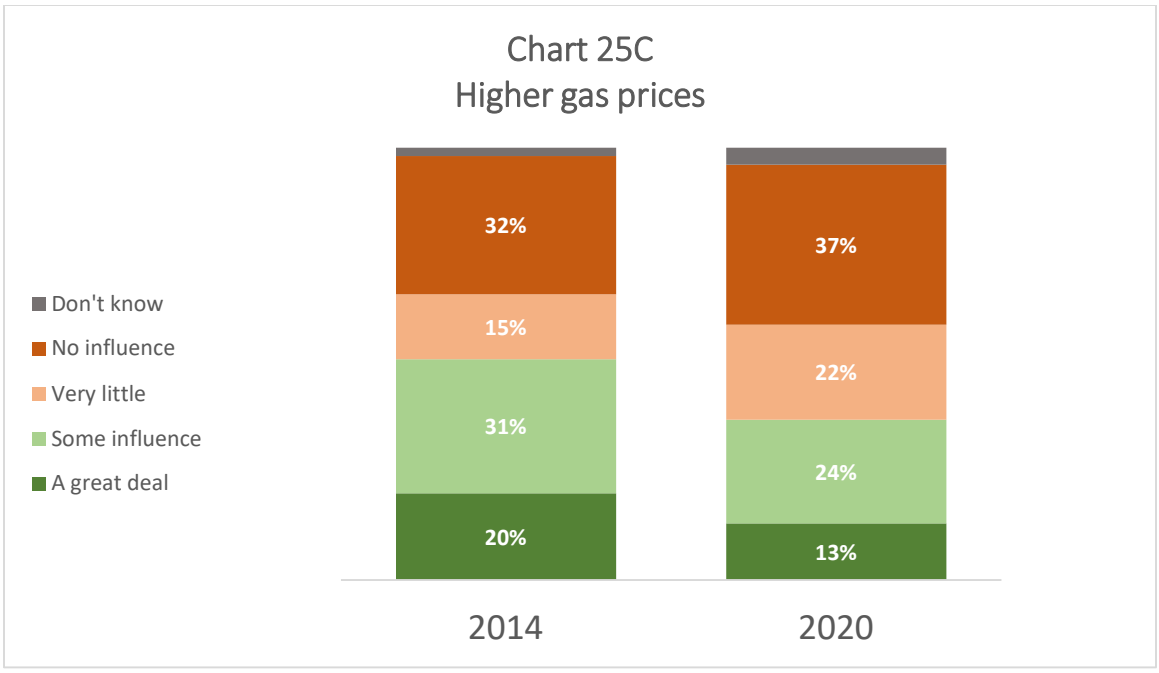


Chart 25C
Higher gas prices
Don't know
No influence
Very little
Some influence
A great deal
32%
15%
31%
20%
37%
22%
24%
13%
2014
2020

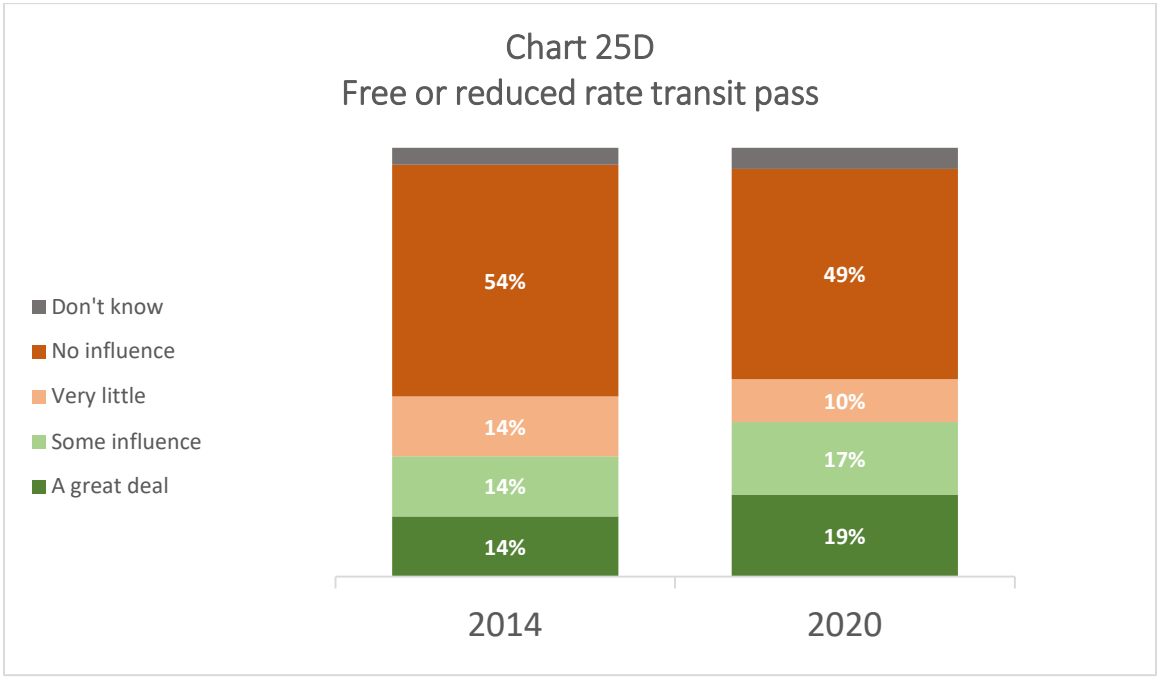


Chart 25D
Free or reduced rate transit pass
Don't know
No influence
Very little
Some influence
A great deal
54%
14%
14%
14%
49%
10%
17%
19%
2014
2020

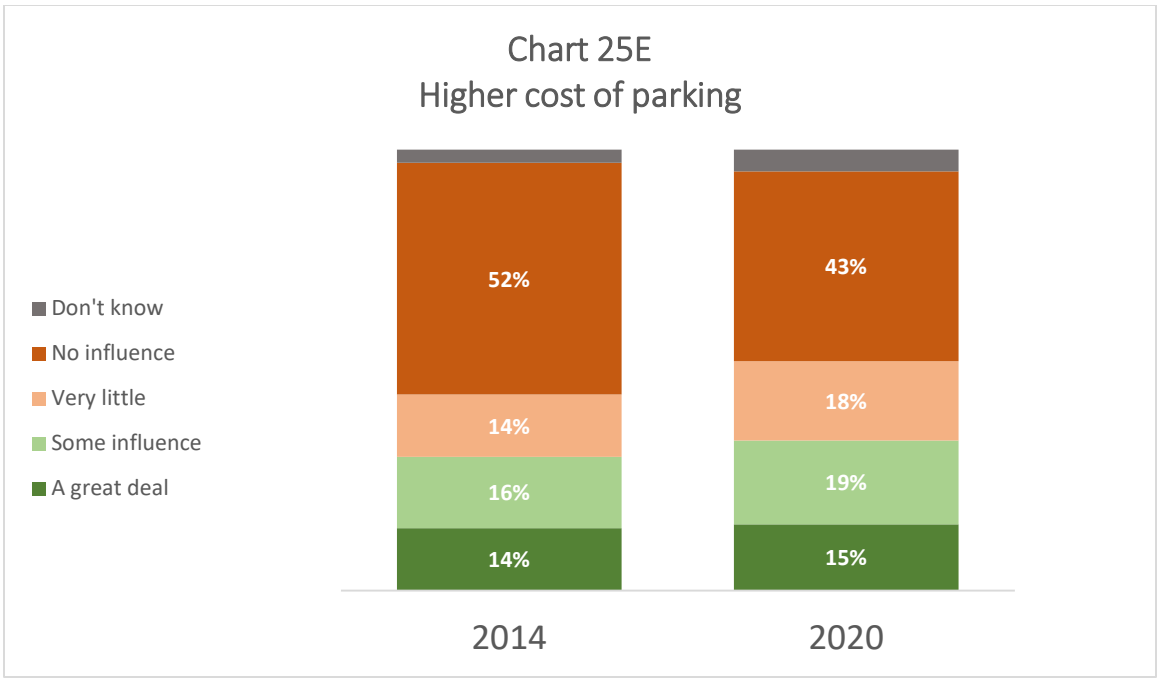


Chart 25E
Higher cost of parking
Don't know
No influence
Very little
Some influence
A great deal
52%
14%
16%
14%
43%
18%
19%
15%
2014
2020

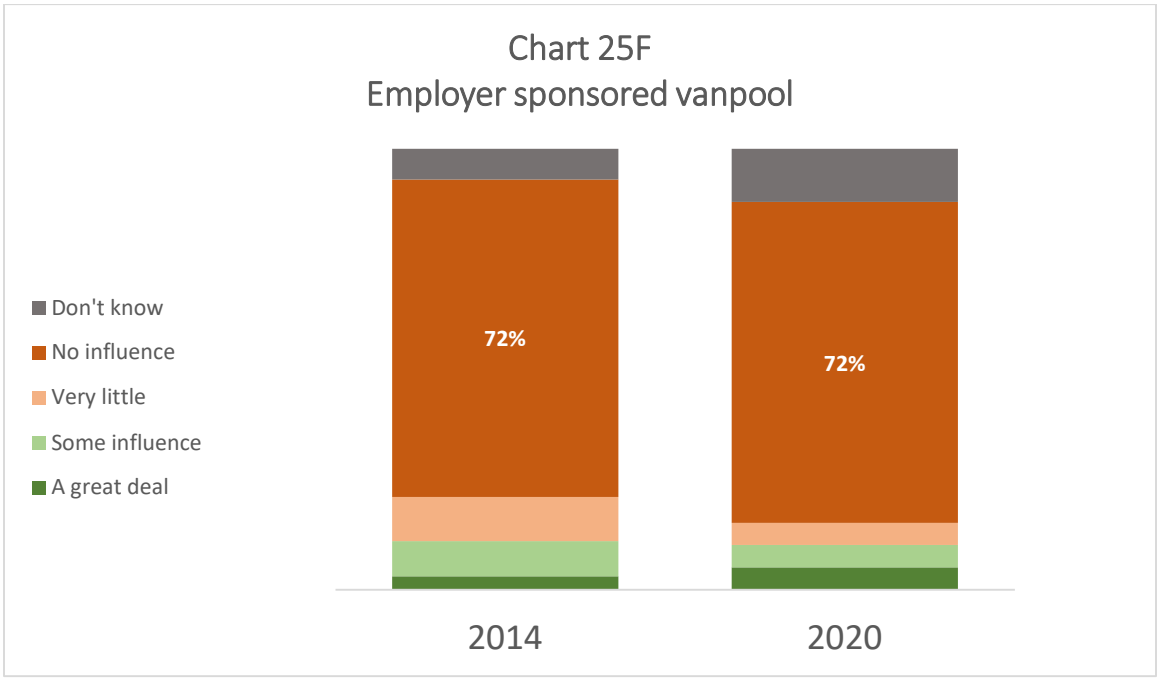


Chart 25F
Employer sponsored vanpool
Don't know
No influence
Very little
Some influence
A great deal
72%
72%
2014
2020

Chart 26
Reasons for Biking for Transportation 2014 vs. 2020

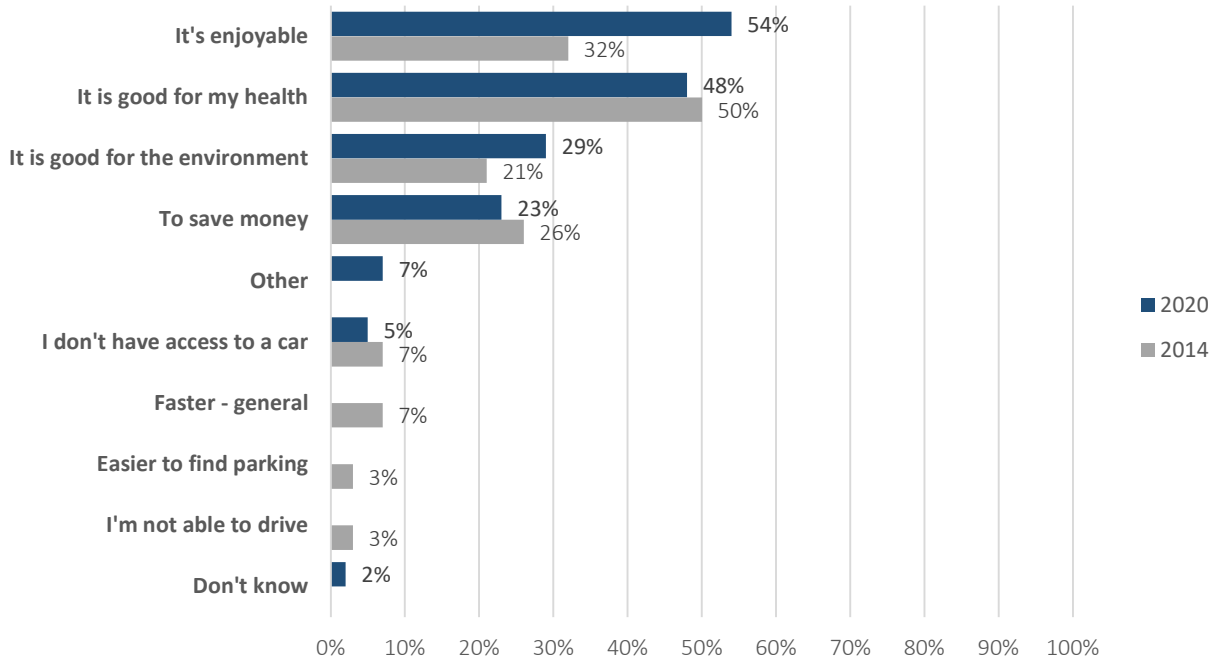
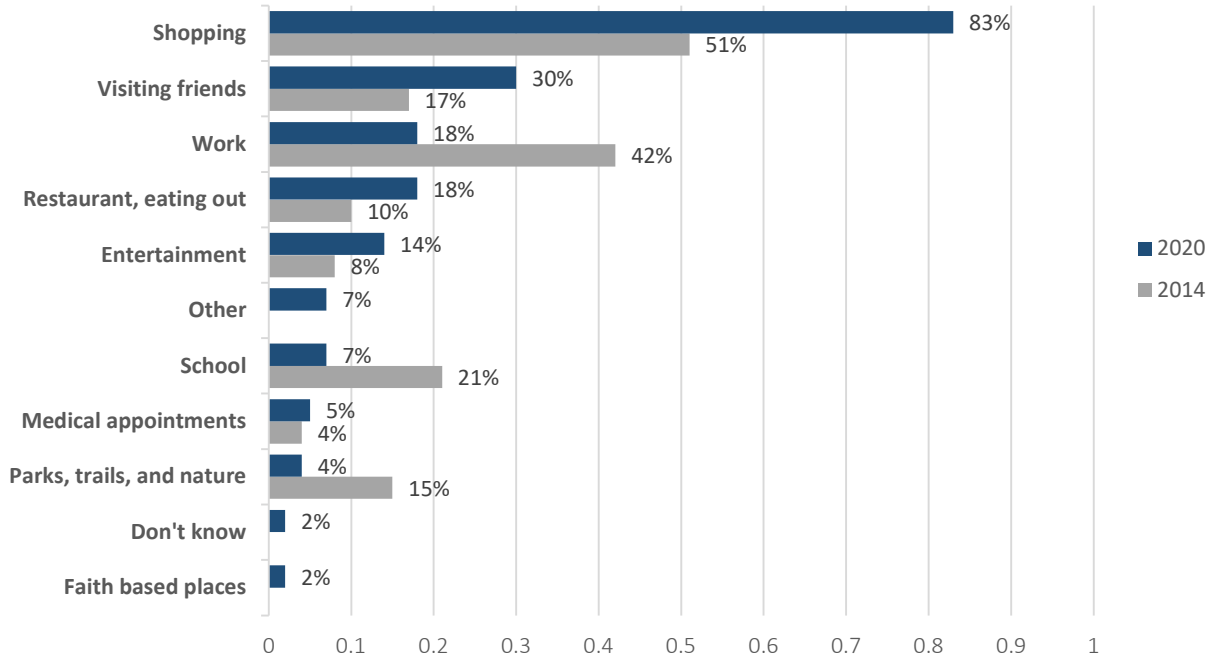


Chart 27
Frequent Destinations by Bike 2014 vs. 2020



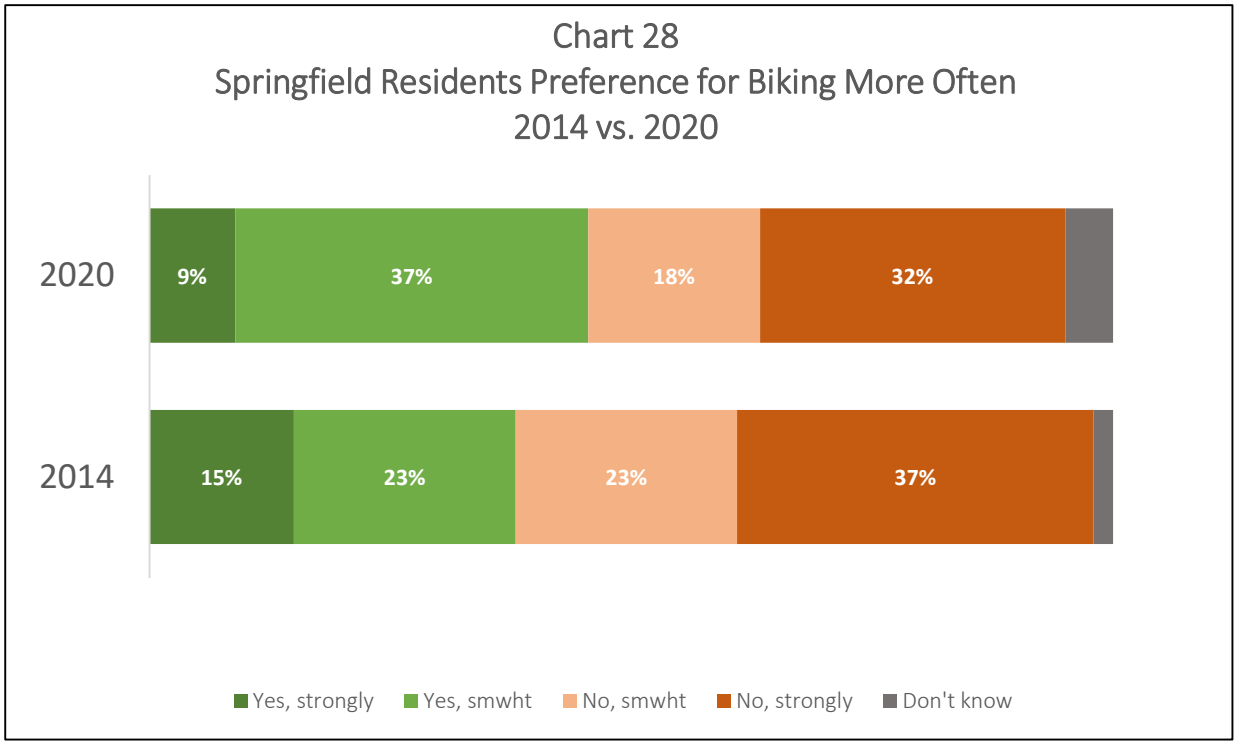


Chart 28
Springfield Residents Preference for Biking More Often
2014 vs. 2020
2020
9%
37%
18%
32%
2014
15%
23%
23%
37%
Yes, strongly
Yes, smwht
No, smwht
No, strongly
Don't know

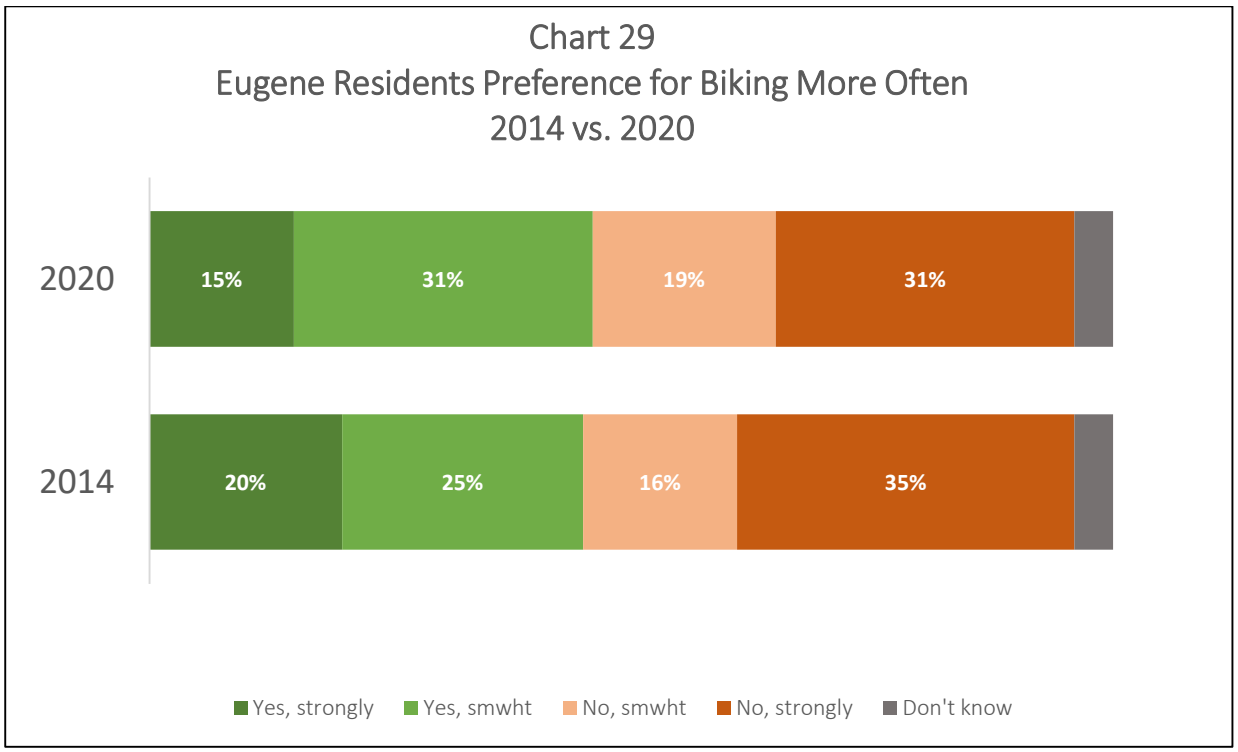


Chart 29
Eugene Residents Preference for Biking More Often
2014 vs. 2020
2020
15%
31%
19%
31%
2014
20%
25%
16%
35%
Yes, strongly
Yes, smwht
No, smwht
No, strongly
Don't know

Chart 30
Reasons for Walking for Transportation Walking 2014 vs. 2020

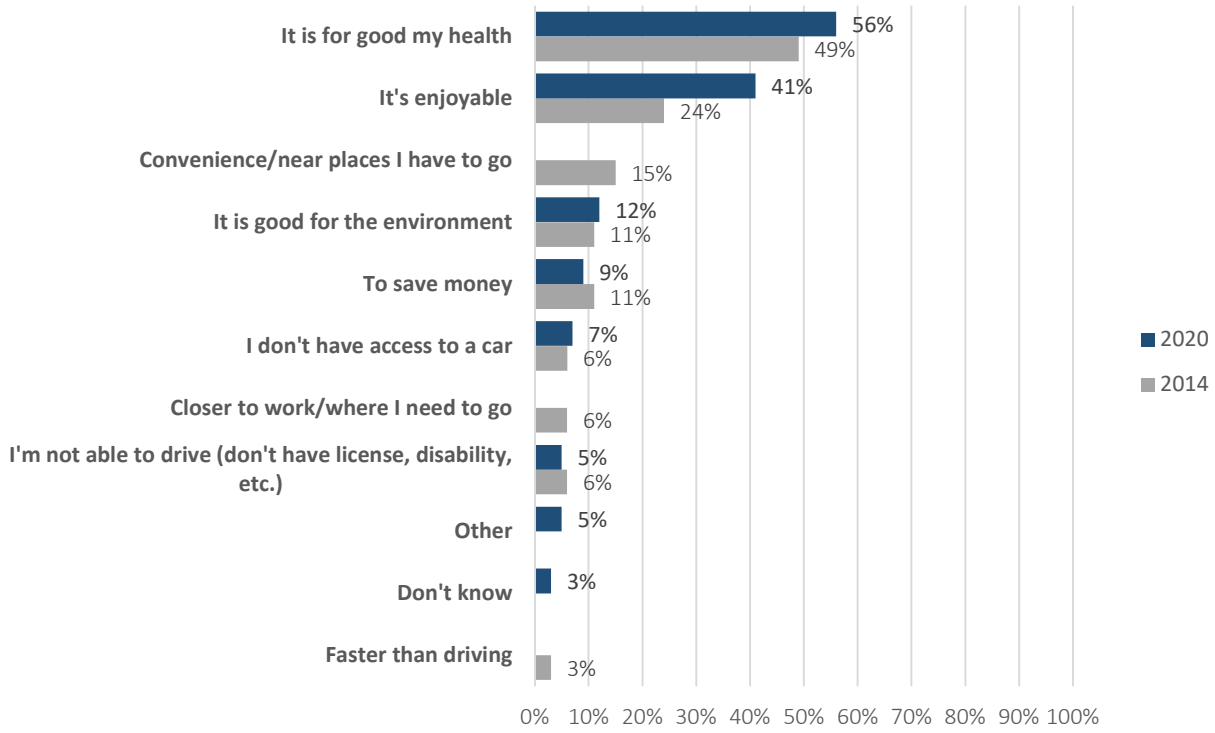
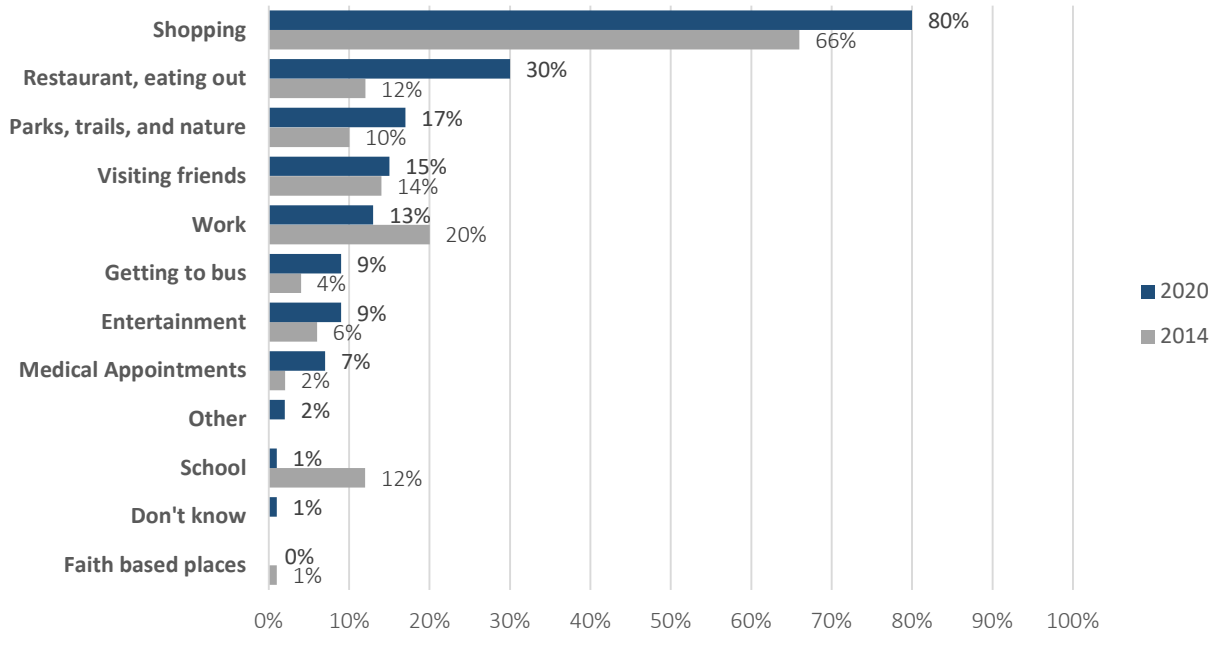


Chart 31
Frequent Destinations by Walking 2014 vs. 2020



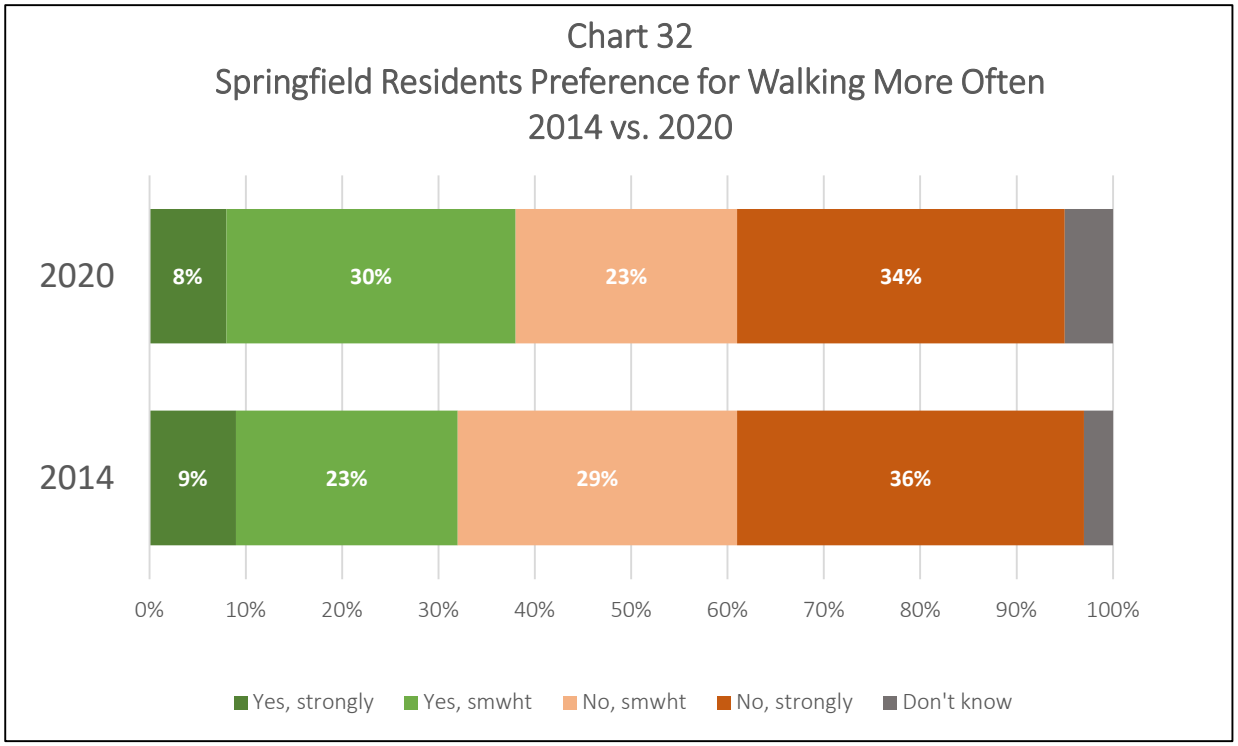


Chart 32
Springfield Residents Preference for Walking More Often
2014 vs. 2020
2020
8%
30%
23%
34%
2014
9%
23%
29%
36%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Yes, strongly
Yes, smwht
No, smwht
No, strongly
Don't know

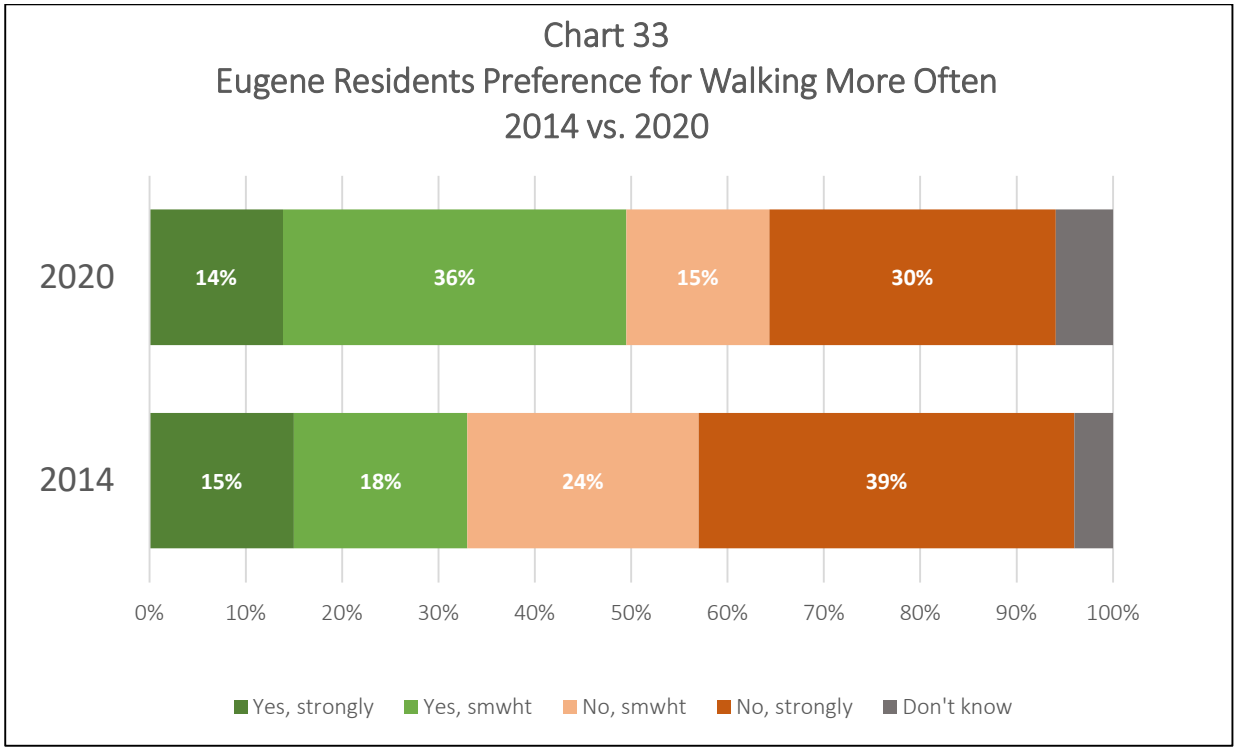
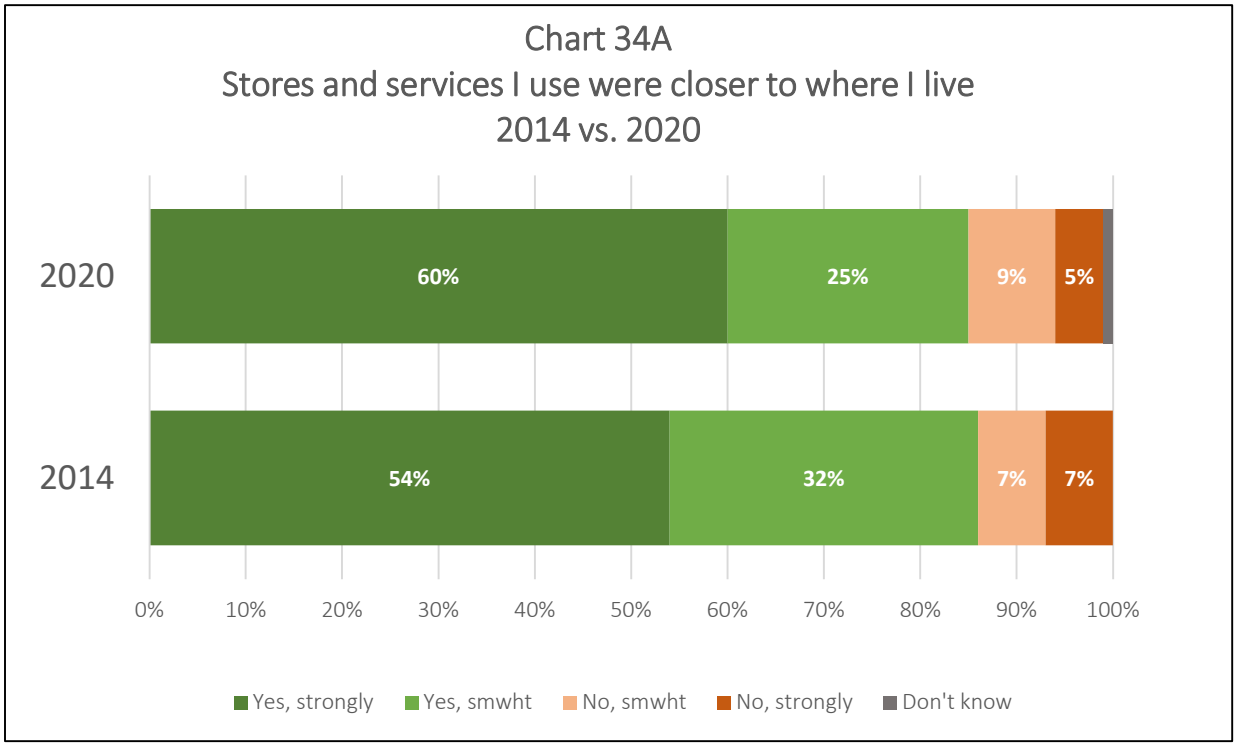
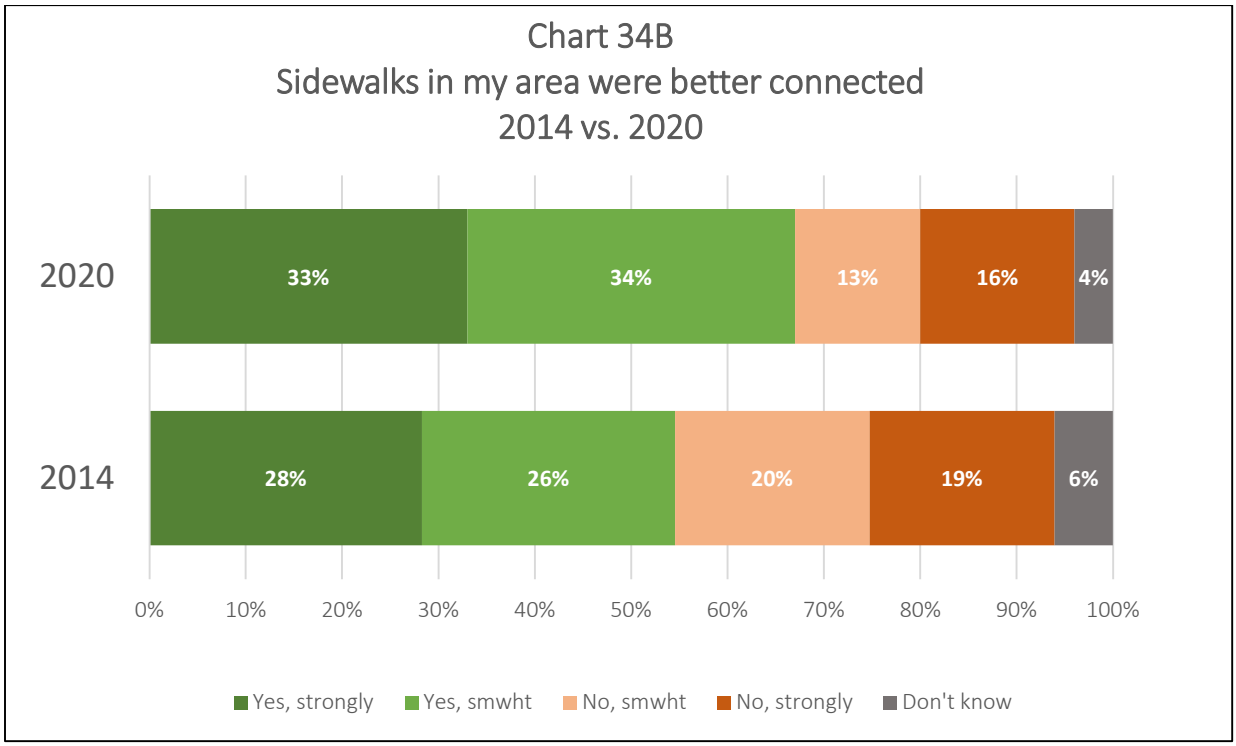


Chart 33
Eugene Residents Preference for Walking More Often
2014 vs. 2020
2020
14%
36%
15%
30%
2014
15%
18%
24%
39%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Yes, strongly
Yes, smwht
No, smwht
No, strongly
Don't know

The following Charts are comparing respondents **Reasons to Walk More** from 2014 and 2020.





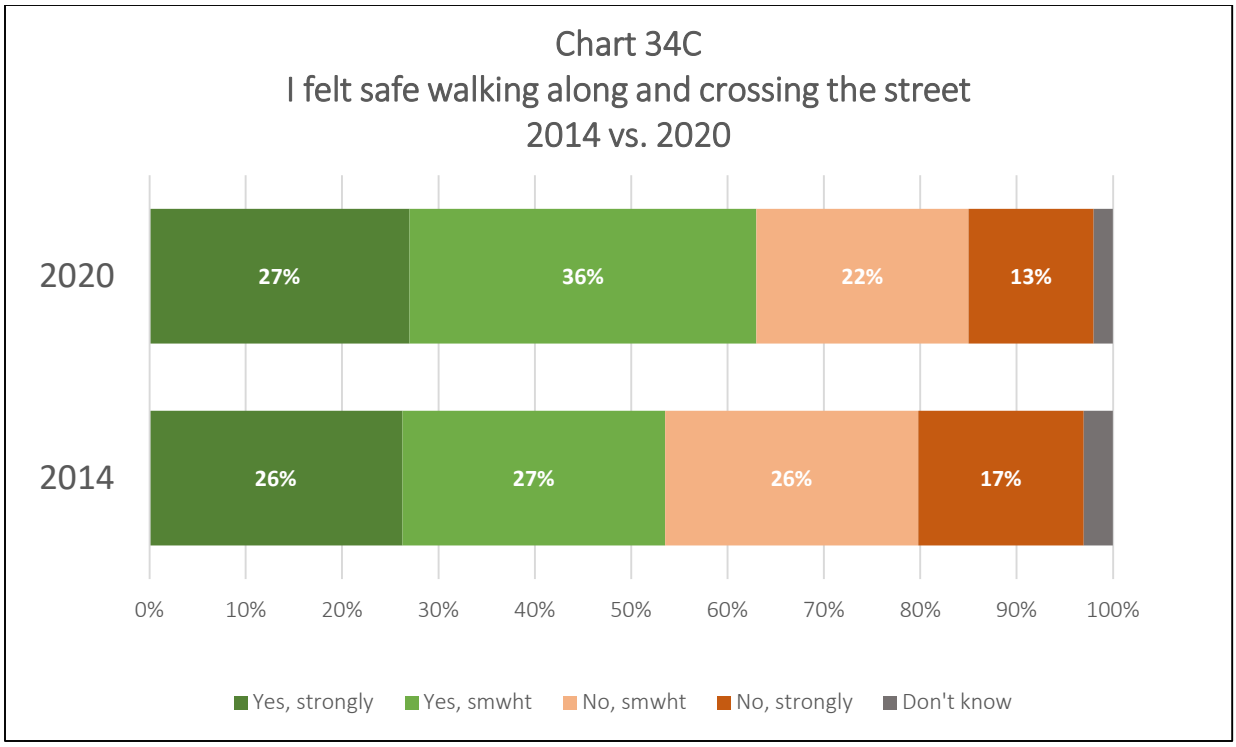


Chart 34C
I felt safe walking along and crossing the street
2014 vs. 2020
2020
27%
36%
22%
13%
2014
26%
27%
26%
17%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Yes, strongly
Yes, smwht
No, smwht
No, strongly
Don't know

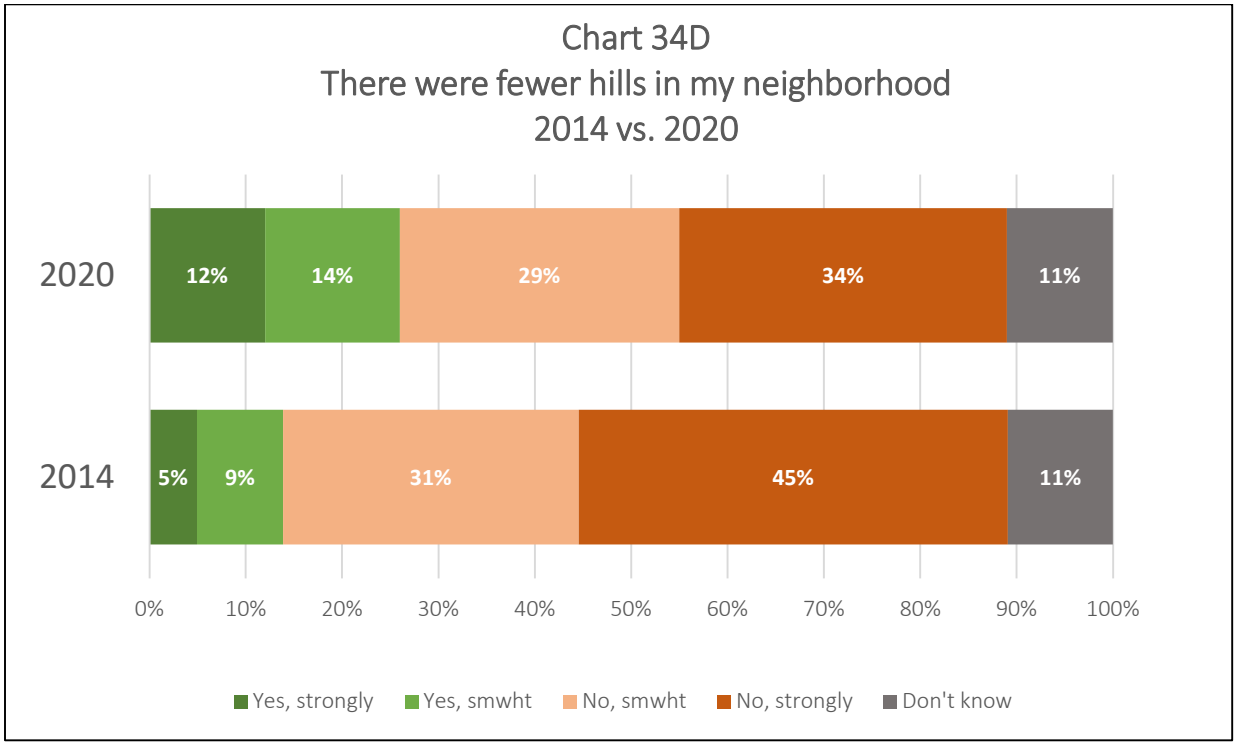


Chart 34D
There were fewer hills in my neighborhood
2014 vs. 2020
2020
12%
14%
29%
34%
11%
2014
5%
9%
31%
45%
11%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Yes, strongly
Yes, smwht
No, smwht
No, strongly
Don't know

5. ANNOTATED QUESTIONNAIRE

DKS / Lane Council of Governments
Travel Behavior and Barriers Benchmark Survey
June 25–July 10, 2020
Central Lane Metropolitan Planning Organization Area Residents
N=502; ±4.9% margin of error
21 minutes
DHM Research
Project #00949

Hello, my name is _____ from [name of fielding house]. I have some questions about transportation issues in your community.

As needed:

- We are not trying to sell you anything.
- The survey should only take a few minutes and I think you will find the questions interesting.
- Your answers are strictly confidential.

GENERAL WARMUP

COVID-19 and the resulting Stay at Home orders have been a big part of everyone's life these past few months. But in thinking about your responses to these questions, do your best to think back to February, before COVID-19 was in Oregon and before the resulting Stay at Home orders.

1. Thinking specifically about transportation in the Eugene-Springfield area, what are the most important transportation issues you would like your local government leaders to do something about? [Open – collect up to three responses]

Response category	n=502
Expanding bus transportation system	31%
Improve traffic congestion	19%
Improve road conditions	18%
Increasing bike accessible areas/bike lanes	8%
Improve Beltline	7%
Improve road safety	6%
Safety on busses/ terminals	6%
Don't see any problems/issues	4%
More affordable/free buses	4%
Better sidewalks/pedestrian paths	4%
Bicycle safety	3%
Reduce pollution/ Alternative fuels	1%
More parking	1%
Bike, e-bike, e-scooter share	1%

Carpool options	<1%
All other responses	--
None/Nothing	8%
Don't know	2%

2. ****How frequently are you commuting to work or school between urban and rural areas within Lane County?[1]

Response category	n=502
Daily	29%
Several times a week but not every day	17%
Several times a month	9%
A few times a year	11%
Never	32%
[Don't read] Don't know	2%

3. ****Would you live closer to your workplace if you were able to find an affordable place to live?

Response category	n=502
Yes	31%
No	35%
[Don't read] Not applicable	33%
[Don't read] Refused/Missing	2%

TRAVEL BEHAVIOR

Again, in responding to these questions, try to place yourself back in time – to February 2020 – before the Stay at Home orders resulting from COVID-19.

Typically, how frequently did you use each of the following ways to travel? Daily, Several times a week but not every day, Several times a month, A few times a year, or Never? **[Randomize Q7–Q10]**

Response Category	Daily	Several times a week but not every day	Several times a month	A few times a year	Never	Don't know
4. Drive alone in your personal vehicle	48%	30%	9%	4%	10%	<1%
5. Drive in your personal vehicle with other household members	18%	35%	19%	6%	22%	0%

[1] All questions containing asterisks are new questions that did not appear in the *Eugene–Springfield Metropolitan Area Travel Barriers and Benefits Survey* (2014) conducted by DHM Research.

Response Category	Daily	Several times a week but not every day	Several times a month	A few times a year	Never	Don't know
6. Share a ride with people not from your household (example: Carpool or Vanpool)	3%	7%	18%	24%	47%	1%
7. ****Ride hailing app, such as Uber or Lyft (2014 Carsharing service: Flex car, Zipcar, Car2Go)	2%	1%	9%	29%	58%	1%
8. Bus, other than school bus. This includes EmX [pronounced: MX] bus rapid transit	4%	8%	11%	24%	53%	<1%
9. Bicycle for non-recreational purposes such as to work, school, shopping, errands, etc.	9%	8%	10%	18%	54%	2%
10. Walking for non-recreational purposes such as to work, shopping, errands, etc.	12%	18%	19%	20%	31%	<1%

11. Now thinking specifically about trips you took other than to work or school, in a typical week, which of the following forms of transportation did you most frequently use? This could include running errands, grocery shopping, getting to public transportation, recreation, etc. **[Collect up to three most frequent modes]**

Response Category	n=502
Drive alone in your personal vehicle	71%
Drive in your personal vehicle with other household members	51%
Share a ride with people not from your household (example: Carpool or Vanpool)	13%
****Ride-hailing app, like Uber or Lyft (2014 Car sharing like Flex car, Zipcar or Car2Go	6%
Bus, other than school bus. This includes EmX **[pronounced: MX]** bus rapid transit	7%
Bicycle for non-recreational purposes such as shopping, errands, etc.	16%
Walking for non-recreational purposes such as shopping, errands, etc.	16%
[Don't read] Don't know	1%

12. **[If Q11 = 1 drove alone]** What are the reasons that you drive alone? **[Open; do not read list, PROBE: Are there any other reasons? Collect up to three responses]**

Response Category	n=358
Freedom (I want to come and go as I please)	44%
Need car for work or for day care/errands	39%
Irregular work schedule	12%
Public transit doesn't go where I need to go, or takes too long	11%
Feel safer	8%
Destinations too far to walk or bike	5%
Want car for emergencies	3%
Live alone	2%
Bad weather	1%
Other (specify)	6%
[Don't read] Don't know	2%

[If Q5 to Q10 = 1 or 2 or 3] Thinking back to when you first started using alternatives to driving alone in the Eugene-Springfield area, how much influence did each of the following have in your decision, a great deal of influence, some influence, very little influence, or no influence? **[Rotate]**

Response Category n=455	A great deal of influence	Some influence	Very little influence	No influence	Don't know
13. Information about health or environmental benefits	18%	29%	16%	32%	4%
14. Free or reduced rate transit pass	19%	17%	10%	49%	5%
15. Employer sponsored vanpool	5%	5%	5%	72%	12%
16. Difficulty parking	19%	27%	16%	34%	3%
17. Higher cost of parking	15%	19%	18%	43%	4%
18. Higher gas prices	13%	24%	22%	37%	3%

19. Is there anything else that influenced your decision to start using alternatives to driving alone? **[Open, if yes, specify.]**

Response Category	n=455
Convenience	15%
Don't have a vehicle	9%
Exercise/health benefits	8%
Enjoy biking	7%
Economical/save money	6%
Environmental issues/factors	5%
Lack of services	2%
Unable to drive/ losing license	2%
Do not drive alone	2%
Lack of vehicle parking	1%
Bike or e-bike program	1%

All other responses	1%
None/Nothing	45%
Don't know	1%

BIKING

20. **[If Q9 = 1 or 2 or 3 Monthly or more often]** Why do you bicycle for transportation? **Open. Do not read list. Accept up to three responses]**

Response Category	n=132
It's enjoyable	54%
It is good for my health	48%
It's good for the environment	29%
To save money	23%
I don't have access to a car	5%
I'm not able to drive (don't have license, disability, etc.)	0%
Other (please specify)	7%
[Don't read] Don't know	2%

21. **[If Q11 = 6 Bike]** When riding your bike for transportation, not for recreation or exercise, what types of places do you typically go most often? **[Open. Do not read list. Accept up to three responses]**

Response Category	n=81
Shopping	83%
Visiting friends	30%
Work	18%
Restaurant, eating out	18%
Entertainment	14%
School	7%
Medical appointments	5%
Parks, trails, and nature	4%
Faith based places	2%
Getting to bus	--
Other (please specify)	7%
[Don't read] Don't know	2%

22. **[If Q11 = 6 Bike]** Do you ride your bicycle to or from public transportation, like to the bus or EmX **[pronounced: MX]**?

Response Category	n=81
Yes	21%
No	79%
[Don't read] Don't know	--

23. **[If Q9 = 3 or 5 Monthly or less often]** Would you prefer to bike more often for **transportation** purposes than you currently do? Is that strongly or somewhat?

Response Category	n=411
Yes, strongly	14%
Yes, somewhat	32%
No, strongly	32%
No, somewhat	19%
[Don't read] Don't know	4%

[If Q23 = 1 or 2 Yes] Next, I'm going to read you some reasons that people may bike more as a form of transportation. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each statement. I would bike more for transportation if…**[Randomize]**

Response Category n=187	Strongly agree	Somewhat agree	Somewhat disagree	Strong disagree	Don't know
24. I felt safer on the roads	44%	28%	15%	11%	3%
25. Bike lanes or paths were available or better connected	46%	30%	9%	8%	7%
26. Quality bike parking were available at destinations	41%	36%	11%	8%	5%
27. Stores and services I use were closer to where I live	39%	32%	16%	9%	5%
28. I knew more about the local bike routes	27%	31%	15%	22%	5%
29. I had access to an electric assist bike	17%	31%	16%	26%	10%

30. Is there anything else that would encourage you to bike more as a form of transportation? **[Open, if yes, specify.]**

Response Category	n=187
Bike parking/storage safety	14%
More bike accessible areas/bike lanes	13%
Safety	9%
If I had a better bike/if I had a bike	8%
Better weather	7%
Incentives—from work or tax break	6%
Bike or e-bike program	5%
If there was better lighting on bike routes/directional signals	5%
Proximity to work	4%
Personal Health/Mental Health	4%
Time—general	1%
None/ Nothing	32%
All other responses	--
Don't know	1%

WALKING

31. [If Q10 = 1 to 3 Monthly or more often] Why do you walk for transportation? [Open. Do not read list, accept up to three responses]

Response category	n=245
It is good for my health	56%
It's enjoyable	41%
It's good for the environment	12%
To save money	9%
I don't have access to a car	7%
I'm not able to drive (don't have license, disability, etc.)	5%
Other (please specify)	5%
[Don't read] Don't know	3%

32. [If Q11 = 7 Walk] When walking for transportation, not for recreation or exercise, what types of places do you typically go most frequently? [Open. Do not read list, accept up to three responses]

Response category	n=82
Shopping	80%
Restaurant, eating out	30%
Parks, trails, and nature	17%
Visiting friends	15%
Work	13%
Entertainment	9%
Getting to bus	9%
Medical appointments	7%
School	1%
Faith based places	--
Other (please specify)	2%
[Don't read] Don't know	1%

33. [If Q10 = 3 to 5 Monthly or less often] Would you prefer to walk more often for transportation purposes than you currently do? Is that strongly or somewhat?

Response category	n=349
Yes, strongly	13%
Yes, somewhat	34%
No, strongly	31%
No, somewhat	17%
[Don't read] Don't know	5%

[If Q33 = 1 or 2 Yes] Next, I'm going to read you some reasons that people may walk more as a form of transportation. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each statement. I would walk more for transportation if… [Randomize]

Response category n=163	Strongly agree	Somewhat agree	Somewhat disagree	Strong disagree	Don't know
34. Stores and services I use were closer to where I live	60%	25%	9%	5%	1%
35. Sidewalks in my area were better connected	33%	34%	13%	16%	4%
36. I felt safer walking along and crossing the street	27%	36%	22%	13%	3%
37. There were fewer hills in my neighborhood	12%	14%	29%	34%	11%

38. Is there any other reason that you would walk more as a form of transportation? **[Open. If yes, specify.]**

Response category	n=163
Health/to be healthier	13%
Safety	12%
Physical fitness/exercise	10%
If where I had to go was closer	8%
Time	5%
Better weather	5%
For enjoyment	3%
Give up driving	2%
Economical/to save money	1%
Benches	<1%
None/Nothing	44%
All other responses	--
Don't know	2%

****BUS / PUBLIC TRANSIT

39. ****[If Q8 = 1 to 3 Monthly or more often]** Why do you use a bus, other than a school bus, for transportation? **[Open. Do not read list, accept up to three responses.]**

Response category	n=118
I don't have access to a car	36%
To save money	28%
It's enjoyable	22%
It's good for the environment	16%
I'm not able to drive (don't have license, disability, etc.)	13%
Other (please specify)	9%
[Don't read] Don't know	2%

40. ****[If Q11 = 5 Bus]** When using a bus for transportation, what types of places do you typically go most frequently? **[Open. Do not read list, accept up to three responses.]**

Response category	n=38
Shopping	70%
Entertainment	46%
Restaurant, eating out	17%
Work	17%
Medical appointments	16%
Visiting friends	15%
Getting to bus	12%
School	6%
Faith based places	3%
Parks, trails, and nature	2%
Other	--
[Don't read]	2%

41. ****[If Q8 = 3 to 5 Monthly or less often]** Would you prefer to take the bus more often for transportation purposes than you currently do? Is that strongly or somewhat?

Response category	n=440
Yes, strongly	9%
Yes, somewhat	20%
No, strongly	49%
No, somewhat	20%
[Don't read] Don't know	3%

[If Q41 = 1 or 2 Yes] Next, I'm going to read you some reasons that people may take the bus more as a form of transportation. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each statement. I would **take the bus** more for transportation if… **[Randomize]**

Response category n=125	Strongly agree	Somewhat agree	Somewhat disagree	Strong disagree	Don't know
42. ****Buses came more frequently	62%	30%	6%	1%	1%
43. ****I could rely on buses to be on time	38%	44%	7%	8%	3%
44. ****There were good connections to and from transit stops	63%	29%	4%	2%	2%
45. ****I felt personally safe using public transit	45%	32%	12%	9%	3%
46. ****Buses were more comfortable	14%	47%	21%	16%	2%
47. ****There were a county-wide bus service for longer commutes and travel	47%	30%	7%	10%	5%
48. ****I knew it would cost less than driving	33%	45%	14%	7%	1%

49. ****Is there any other reason that you would take the bus more as a form of transportation? **[Open. If yes, specify.]**

Response category	n=125
More frequent service	24%
Bus stations closer	19%
More friendly for disabled	7%
Additional bus routes	6%
Cleaner	5%
Reliable/on time	4%
Safer	4%
More bike friendly	4%
Save money	3%
Car is broken/ has a car instead	3%
Free fare	3%
Schedule restrictions	2%
Protect environment	2%
Bus passes	1%
Homeless	--
None/Nothing	29%
All other responses	--
Don't know	2%

MULTI-MODAL TRANSPORT

When it comes to alternative transportation options, are you very interested, somewhat interested, somewhat uninterested, or not at all interested in the following: **[Randomize]**

Response category n=502	Very interested	Somewhat interested	Somewhat uninterested	Not at all interested	Don't know
50. ****Bike share programs or programs to allow you to try out electric assist bikes	17%	32%	12%	37%	2%
51. ****Programs to encourage the use of electric scooters	16%	27%	14%	41%	2%
52. ****Programs that would make Electric Vehicles more convenient to use, such as more EV charging stations	25%	29%	11%	31%	3%

TELECOMMMUTING

53. ****Do you think the recent experience with COVID-19 and the state stay at home order will make it more likely that telecommuting for work or school will be a part of your future?

Response category	n=502

Yes, very likely	32%
Yes, somewhat likely	14%
No, unlikely	31%
[Don't read] Not applicable	16%
[Don't read] Don't know	6%

54. ****Would you prefer to telecommute to work or school in the future, even at least some of the time, if you had the option?

Response category	n=502
Yes	48%
No	18%
[Don't read] Not an option	10%
[Don't read] Not applicable	18%
[Don't read] Don't know	6%

55. ****[If Q54 = 1 Yes] How many days in a normal five-day work week would you prefer to telecommute to work or school?

Response category	n=240
One day a week	10%
Several days a week	54%
Five days a week	28%
[Don't read] Don't know	8%

DEMOGRAPHICS

These last few questions are to make sure we have talked to a representative portion of the community. They are very important and remember that all of your answers are confidential and not associated with your name in any way.

56. What best described your working status in February 2020, before the Stay at Home orders resulting from COIVD-19?

Response category	n=502
Employed full or part time (Employed)	59%
Student full or part time (Student)	7%
Homemaker (Unemployed)	4%
Unemployed, retired (Unemployed)	24%
Other (Unemployed)	5%
[Don't read] Refused (Unemployed)	1%

57. **[Phone]** Including yourself, how many people live in your household? **[Do not read list; select one]** **[Online:]** Including yourself, how many people live in your household? **[Check one]**

Response category	n=502
1	23%
2	35%
3	20%
4	14%
5	3%
6	3%
7	n=2
8 or more	1%
Refused	n=1

58. **[Phone if Q57>1]** How many children under the age of 18 live in your household? **[Online if Q57>1]** How many children under the age of 18 live in your household? **[Check one]**

Response category	n=502
No children	70%
1	14%
2	11%
3	3%
4	1%
5	0%
6 or more	--
Refused	1%

59. How many bikes does your household currently have? **[Record number]**

Response category	n=502
None	28%
1	20%
2	22%
3	13%
4	7%
5 or more	9%
Refused	1%

60. How many vehicles does your household currently have? **[Record number]**

Response category	n=502
None	6%
1	32%
2	40%
3	13%
4	3%
5 or more	4%

Response category	n=502
Refused	1%

61. Which category best describes your 2019 gross household income, before taxes? Remember to include everyone living in your household. Your best estimate will do.

Response category	n=502
Less than $25,000	13%
$25,000 to less than $50,000	23%
$50,000 to less than $75,000	22%
$75,000 to less than $100,000	13%
$100,000 to less than $150,000	11%
$150,000 or more	7%
[Don't read] Refused/Missing	10%

62. Age

Response category	n=502
18–24	12%
25–34	21%
35–54	30%
55–64	14%
65+	23%
Refused	n=2

63. Do you describe your gender as:

Response category	n=502
Male	49%
Female	49%
Non-binary or gender non-conforming	2%
[Don't read] Refused/missing	1%

64. Which of the following best describes your race or ethnicity?

Response category	n=502
African American/Black	3%
Asian/Pacific Islander	5%
Hispanic/Latino	5%
Native American/American Indian	1%
White/Caucasian	84%
Other	2%
[Don't read] Don't know	1%
[Don't read] Refused/Missing	7%

65. Party

Response category	n=502
Democrat	40%
Republican	17%
Independent	8%
Other	6%
Non-affiliated	25%
Missing	4%