M2 Comprehensive Review

Quantitative Survey - Summary Report

Prepared for

OCTA

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INTRODUCTION

In 1990, Orange County voters approved establishing a local half-cent sales tax (Measure M) dedicated to transportation improvements and traffic relief projects, including expanding and improving freeways, upgrading intersections, adding capacity and improved maintenance of city streets, and improving transit services. Renewed by voters for an additional 30 year term in 2011 (M2), it is estimated that the combined Measure M plans will deliver more than $20 billion in transportation improvements to Orange County by the year 2041.

Recognizing that any long-term investment plan must be revisited periodically and adjusted, as needed, to reflect updated policy, financial and external conditions, the Orange County Transportation Authority (OCTA) periodically conducts a Comprehensive Review of the M2 program. In addition to generating updated financial projections and assessing the impact of policy changes, an important goal of the review is to gauge public and stakeholder support for key components of the plan, as well as projects that could receive discretionary funding in the future.

MOTIVATION FOR RESEARCH

The survey described in this report was designed to provide OCTA with an objective, statistically reliable assessment of Orange County voters' awareness, perceptions, opinions, and priorities as they pertain to OCTA and the many projects, programs, and services provided by the Authority under the M2 investment Plan. More specifically, the study was designed to **measure** and **track** perceptions of OCTA and the agency's role in implementing safe, equitable, and efficient transportation solutions, **explore** how the public prioritizes among key transportation projects, programs, and capital investments that are part of the M2 Investment Plan, and **gather** feedback on important issues and policy decisions that OCTA faces in an environment characterized by declining revenues, increasing costs, shifting demand, and emerging technologies. Naturally, the 2024 survey also presents an opportunity to **identify** the extent to which Orange County residents' views on transportation issues and priorities may have shifted since the first M2 Comprehensive Review was completed in 2015.

OVERVIEW OF METHODOLOGY

For a full discussion of the research methods and techniques used in this study, turn to *Methodology* on page 34. In brief, the survey was administered to a random sample of 1,080 voters in Orange County who are likely to participate in the November 2024 election.[1] The survey followed a mixed-method design that employed multiple recruiting methods (email, text, and phone) and multiple data collection methods (phone and online). Administered in English, Spanish and Vietnamese between April 25 and May 8, 2024, the average interview averaged 18 minutes in length. The results presented in this report are representative at the countywide level, as well as within Supervisorial Districts.

Why sample likely voters? The M2 Investment Plan was driven by the priorities and preferences of likely voters as determined by research at that time, and both M2 and the associated Investment Plan were ultimately approved by voters who participated in the November 2006 election. Since the goal of this study is to understand how priorities and preferences may have changed over time, it makes sense to see how this same group (likely voters) prioritize across M2 project categories today.

1. Being a high-turnout presidential general election, the November 2024 electorate is the largest 'likely voter' universe.

STATISTICAL SIGNIFICANCE Many of the figures and tables in this report present the results of questions asked in 2024 alongside the results found in prior OCTA surveys for identical questions. In such cases, True North conducted the appropriate tests of statistical significance to identify changes that likely reflect actual changes in public opinion between the study periods—as opposed to being due to chance associated with selecting two samples independently and at random. Differences between the prior surveys and the 2024 survey are identified as *statistically significant* if we can be 95% confident that the differences reflect an actual change in public opinion or behavior between the two studies. Statistically significant differences within response categories over time are denoted by the † symbol which appears in the figure next to the appropriate response value for 2024.

In addition to the passage of time, it should also be noted that the 2024 survey was administered to a somewhat narrower universe of individuals when compared to the prior OCTA surveys. Because of the mix of research objectives for the prior studies, the samples were drawn from all adults rather than likely voters. Moreover, the 2015 survey relied heavily on telephone data collection, whereas most of the 2024 survey interviews were completed online according to respondents' preferences. These sampling and data collection mode differences can also account for some of the differences in results when comparing the present study findings to past surveys.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the section titled *Key Findings* is for you. It provides a summary of the most important factual findings of the survey in a Question & Answer format. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the survey by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaire used for the interviews is contained at the back of this report (see *Questionnaire & Toplines* on page 37), and a complete set of crosstabulations for the survey results is contained in Appendix A.

ACKNOWLEDGMENTS True North thanks OCTA for the opportunity to assist in this important effort. The collective expertise, local knowledge, and insight provided by OCTA staff and representatives improved the overall quality of the research presented here.

DISCLAIMER The statements and conclusions in this report are those of the authors (Dr. Timothy McLarney and Richard Sarles) at True North Research, Inc. and not necessarily those of OCTA. Any errors or omissions are the responsibility of the authors.

ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities, and concerns of their residents and voters. Through designing and implementing scientific surveys, focus groups, and one-on-one interviews as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, establishing fiscal priorities, passing revenue measures, and developing effective public information campaigns.

During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 1,300 survey research studies for public agencies, including more than 500 studies for California municipalities, special districts, and transportation planning agencies.

KEY FINDINGS

As noted in the *Introduction*, this study was designed to provide OCTA with an objective, statistically reliable assessment of Orange County voters' awareness, perceptions, opinions, and priorities as they pertain to OCTA and the many projects, programs, and services provided by the Authority under the M2 investment Plan. Whereas subsequent sections of this report are devoted to conveying the detailed results of the survey, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer some of the key questions that motivated the research.

Does there continue to be public support for projects funded or to be funded by Measure M?

Yes. Although awareness of Measure M remains low,[2] the survey results provide clear evidence that voters support nearly all of the projects and services that are funded by Measure M—as well as those that could receive funding in the future. Moreover, the relative priority they assign to specific projects and improvements has remained quite stable over the past decade.

Among all M2 projects and services tested, respondents assigned the *highest* priority to fixing potholes and repairing roadways (92% high or medium priority), coordinating traffic signals on major roadways to improve traffic flow (87%), closing gaps, improving intersections, and reducing traffic congestion on major roads throughout the County (84%), providing transit services to seniors and the disabled at discounted rates (78%), optimizing the existing transportation system (77%), and cleaning up polluted runoff from roads to reduce water pollution and protect local beaches (77%).

At least two-thirds of respondents also assigned a high or medium priority to improving safety and security at transit stops and stations (74%), taking steps to protect the transportation system from flooding, mudslides, sink holes, and other extreme weather events (74%), adding local bus and shuttle services in communities that aren't well served by regional transit services (69%), and preserving and restoring open space land to offset the impacts of freeway improvement projects (68%).

Projects and services that were prioritized in the third tier (60%-67% high or medium priority) included modifying streets so they can safely accommodate all forms of transportation including cars, transit, pedestrians and bicyclists (65%), expanding METROLINK rail service (62%), improving ACCESS paratransit service for people with disabilities (62%), improving access to METROLINK stations using shuttles, light rail, and other transit services (62%), widening freeways (62%), and constructing roads over or under rail tracks where needed to improve traffic flow (61%).

2. Approximately one-third (33%) of likely voters surveyed in 2024 had heard of Measure M (also known as OC Go) prior to taking the survey. This percentage is reasonably consistent with the findings of prior surveys of Orange County adults conducted in 2018, 2015, and 2011.

Although still rated as a high or medium priority by a majority of respondents, making it easier for transit riders to get to their final destination by offering shuttles, e-bikes, e-scooters, and rideshare services at transit stations (58%), expanding bus service (57%), providing free assistance and tow truck service to motorists who break down on freeways (57%), creating a network of light rail streetcars, similar to the San Diego trolley system (55%), and improving the network of bike lanes (52%) were viewed as lesser priorities.

Finally, among all the projects and services tested, just two were viewed as a high or medium priority by less than half of Orange County voters: building additional toll lanes to help relieve traffic congestion (34%) and expanding vanpool programs (33%). For more details on this topic, turn to *Transportation Priorities* on page 15.

What are voters' opinions of transportation conditions and services in Orange County?

In addition to identifying how voters prioritize among a variety of projects and services funded by M2, the survey sought to understand how respondents assess various aspects of Orange County's transportation system.

Overall, respondents assigned the highest quality ratings to the overall quality and condition of the 405 Express Lanes (54% excellent or good), followed by ACCESS paratransit service (51%), the overall quality and condition of freeways (47%), overall quality and condition of the 91 Express Lanes toll road (46%), and the overall quality and condition of city streets (43%). All of the remaining items were rated similarly, with a combined excellent or good rating between 36% and 40%.

When compared to the 2015 study findings, the percentage who rated each aspect of Orange County's transportation system as excellent or good was significantly lower in 2024, with the largest differences in ratings found for Metrolink rail service, bus service, rideshare/carpool matching programs, and vanpool programs. For more on this topic, see *Transportation Conditions & Services* on page 11.

Are voters aware of OCTA and what are their impressions of the agency?

Transportation agencies often operate in relative obscurity from the public's perspective. Although virtually all residents can identify their city and—to a lesser extent—their local school district, special districts are often not on the average resident's radar. Considering the above, the level of public awareness of the Orange County Transportation Authority continues to be quite high. Nearly nine-in-ten respondents (89%) had heard of OCTA prior to participating in the 2024 survey, which is similar to the awareness levels recorded periodically over the past two decades.

As in the past, however, awareness of OCTA does not necessarily translate into having an opinion of the Authority. Approximately one-in-five respondents indicated that they did not have an opinion of OCTA or pre-

ferred not to answer the question. Among those with an opinion of OCTA, however, their views were generally positive. Those with favorable opinions of OCTA in 2024 (59%) outnumbered those with unfavorable opinions (20%) by nearly 3 to 1. The percentage of respondents with a favorable opinion of OCTA has steadily increased over time, from 42% in 2011 to 59% in 2024.

Consistent with the above findings, a sizeable minority of residents (ranging from 18% to 31%) did not hold more nuanced opinions about OCTA on more specific performance issues such as making good use of public funds, being trustworthy, or delivering improvements to the transportation system. Once again, however, among those with an opinion favorable assessments outnumbered negative assessments. For example, the percentage who agreed with the statements *OCTA helps our local and regional economies function by improving our transportation system*, *is a public agency I trust*, and *has made many improvements to Orange County's transportation system in the past five years* was approximately three times larger than the percentage who disagreed with the statements. For more on this topic, turn to *OCTA & Measure M* on page 20.

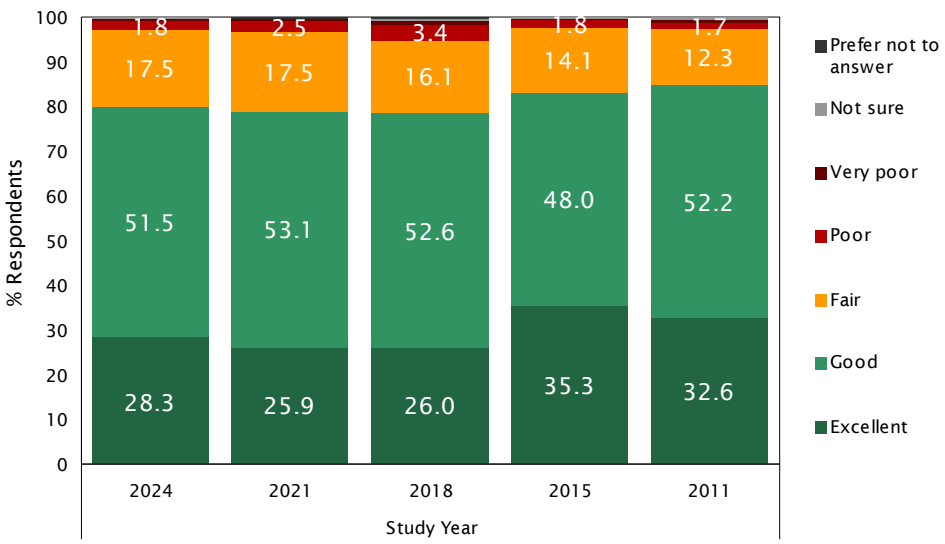
Quality of Life

The opening series of questions in the 2024 survey was designed to assess residents' top of mind perceptions about the quality of life in Orange County, as well as their ideas regarding changes that would make Orange County a better place to live—now and in the future.

QUALITY OF LIFE At the outset of the interview, respondents were asked to rate the quality of life in the County using a five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 1 below, nearly 8-in-10 respondents in 2024 shared favorable opinions of the quality of life in Orange County, with 28% reporting it is excellent and 52% stating it is good. Approximately 18% of respondents indicated the quality of life in the County is fair, whereas just 2% used poor or very poor to describe quality of life in Orange County. As shown in the figure, perceptions of the overall quality of life in Orange County have remained quite stable for more than a decade, and there were no statistically significant differences between the two most recent studies (2021 and 2024).

Question 2 *How would you rate the overall quality of life in Orange County? Would you say it is excellent, good, fair, poor or very poor?*

FIGURE 1 QUALITY OF LIFE IN ORANGE COUNTY BY STUDY YEAR



On the next page, Figures 2-4 show how residents' perceptions of the quality of life in Orange County varied by key characteristics, including length of residence, age, survey language, employment status, ethnicity, household income, Supervisorial District, and party affiliation. Although the general pattern is one of a consistently positive assessment of the quality of life in Orange County across resident subgroups, it is worth noting that household income continues to be a significant factor in shaping perceptions of the quality of life in Orange County.[3] In general, the higher an individual's household income, the more likely they were to rate the quality of life in the County as excellent. Similarly, ratings of the quality of life in the County were more positive among respondents over 40 years of age and those who took the survey in English.

3. A similar pattern was found in the 2011, 2015, 2018, and 2021 surveys.

FIGURE 2 QUALITY OF LIFE IN ORANGE COUNTY BY YEARS IN ORANGE COUNTY, AGE & SURVEY LANGUAGE

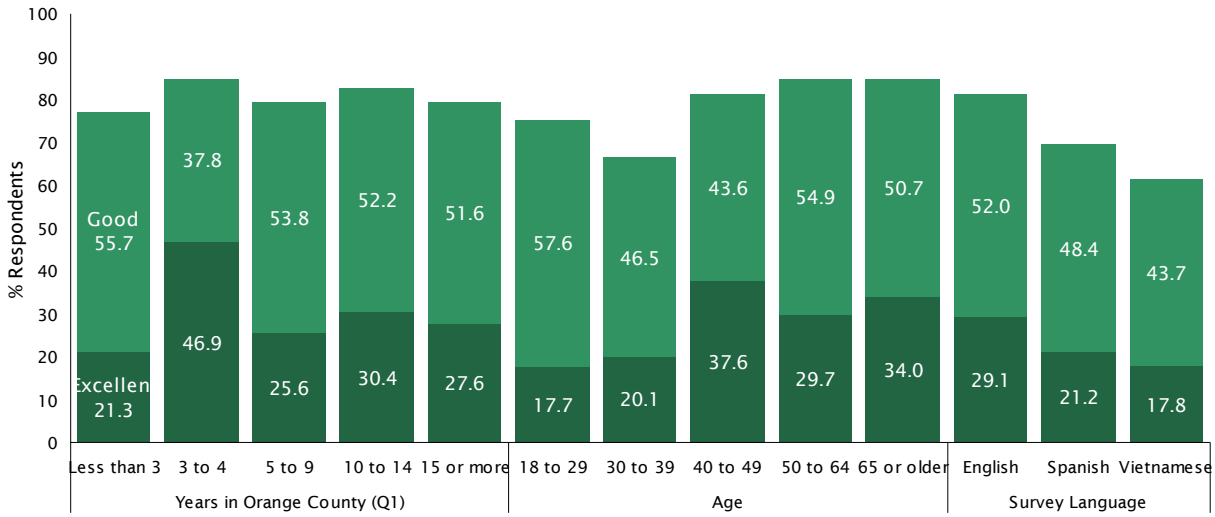


FIGURE 3 QUALITY OF LIFE IN ORANGE COUNTY BY EMPLOYMENT STATUS & ETHNICITY

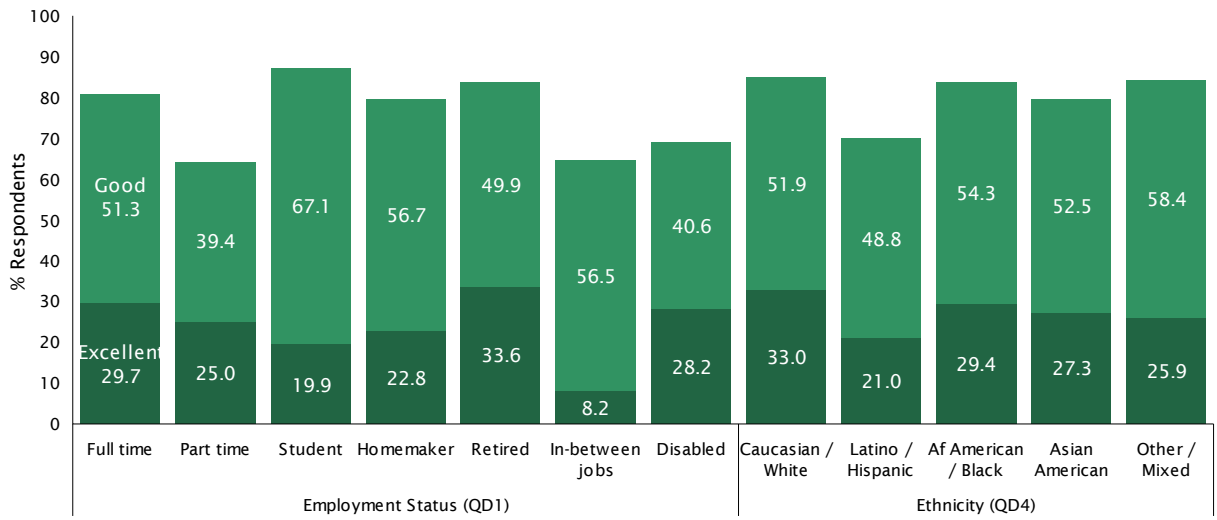
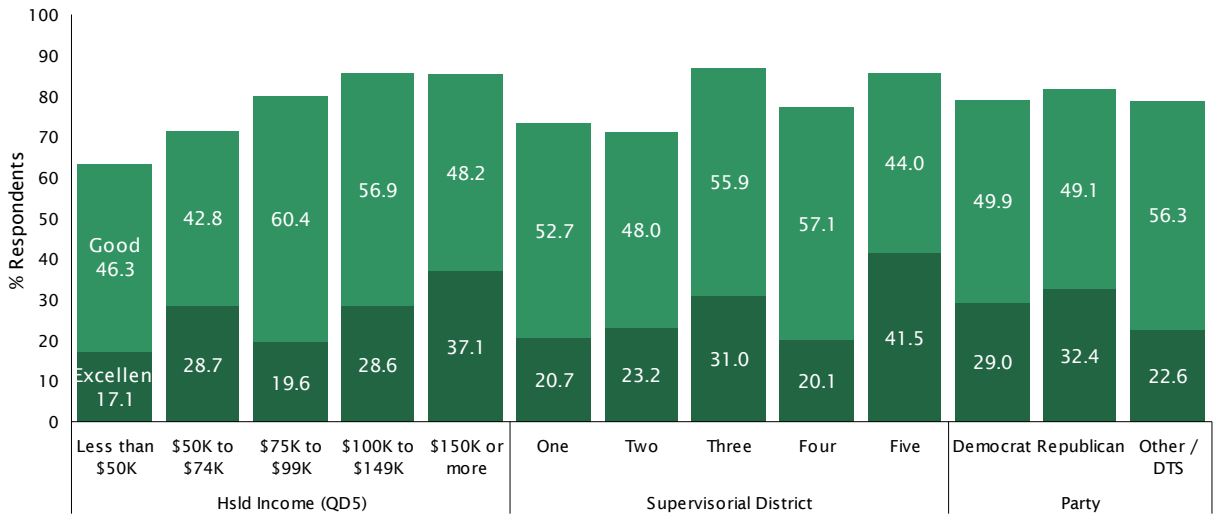


FIGURE 4 QUALITY OF LIFE IN ORANGE COUNTY BY HSLD INCOME, SUPERVISORIAL DISTRICT & PARTY



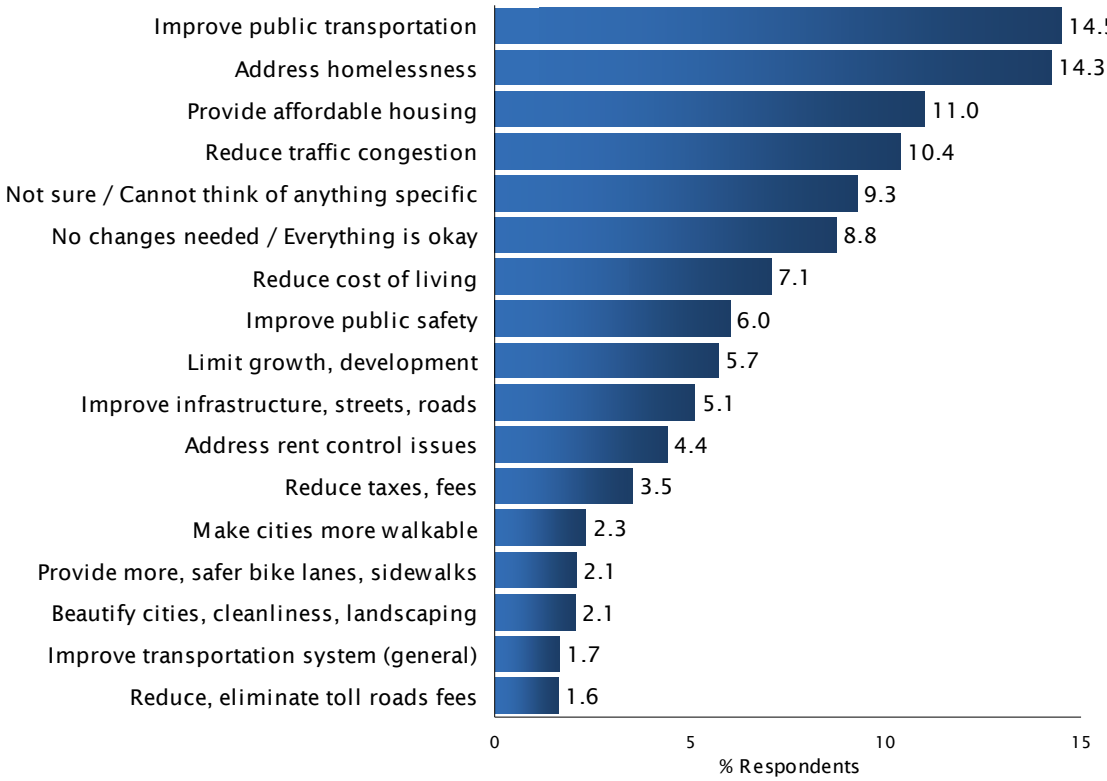
CHANGES TO IMPROVE ORANGE COUNTY

The next question in this series asked residents to indicate the one thing they would *change* to make Orange County a better place to live, now and in the future. Question 3 was presented in an open-ended manner, allowing residents to mention any aspect or attribute that came to mind without being prompted by, or restricted to, a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 5 on the next page.

Close to one-in-five respondents could not think of a desired change (9%) or stated flatly that no changes are needed (8%). Among the specific changes desired to make Orange County a better place to live, improving public transportation was the most commonly mentioned (15%), followed by addressing homelessness (14%), providing affordable housing (11%), and reducing traffic congestion (10%).

Question 3 *If you could change one thing to make Orange County a better place to live now and in the future, what change would you like to see?*

FIGURE 5 CHANGES TO IMPROVE ORANGE COUNTY



Transportation Conditions & Services

Having measured respondents' perceptions of the quality of life in Orange County, the survey transitioned to measuring their opinions of the transportation system and services provided by OCTA.

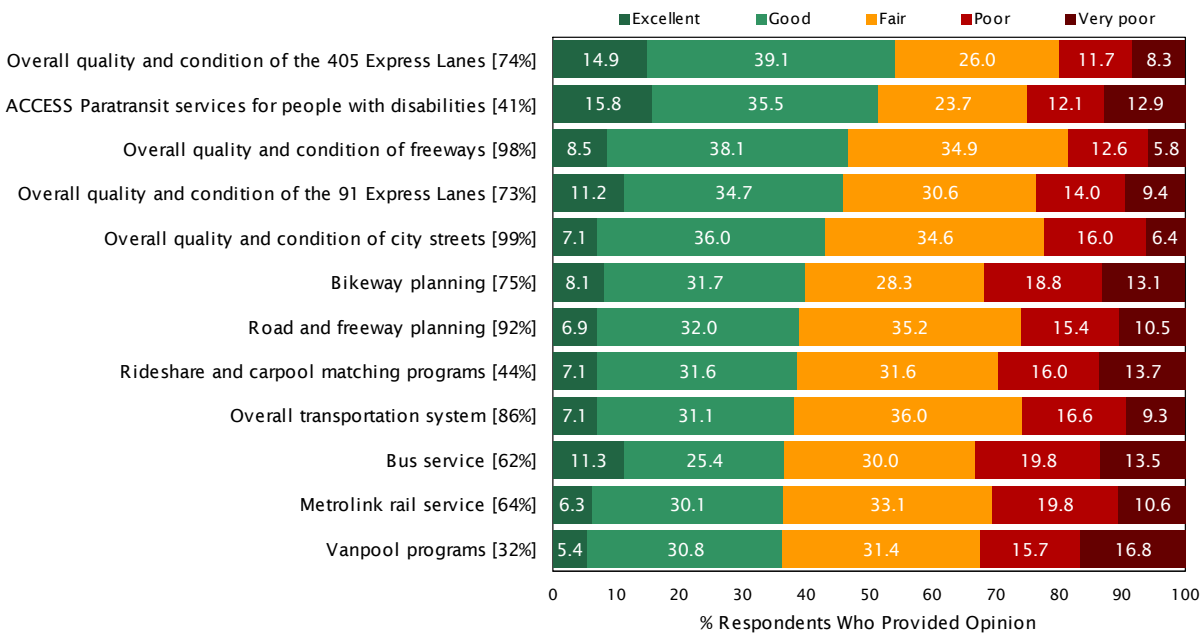
RATING OF TRANSPORTATION SYSTEM & SERVICES

Question 4 asked respondents to rate various aspects of Orange County's transportation system and the services provided by OCTA using a five-point scale of excellent, good, fair, poor, or very poor. The order of the items was randomized for each respondent to avoid a systematic position bias.

Figure 6 presents the items ranked according to the proportion of residents who rated an item as excellent or good. To allow for an apples-to-apples comparison of the ratings, only respondents who held an opinion were included in Figure 6. Those who did not have an opinion were removed from this analysis. The percentage who held an opinion for each item is shown to the right of the label in parentheses. Thus, for example, among the 74% of respondents who expressed an opinion about the overall quality and condition of the 405 Express Lanes, 15% rated the item as excellent and 39% provided a rating of good.

Question 4 *How would you rate: _____ in Orange County? Would you say it is excellent, good, fair, poor, or very poor - or do you have no opinion?*

FIGURE 6 RATING OF TRANSPORTATION SERVICES IN ORANGE COUNTY



Overall, respondents assigned the highest quality ratings to the overall quality and condition of the 405 Express Lanes (54% excellent or good), followed by ACCESS paratransit service (51%), the overall quality and condition of freeways (47%), overall quality and condition of the 91 Express Lanes toll road (46%), and the overall quality and condition of city streets (43%). All of the

remaining items were rated similarly, with a combined excellent or good rating between 36% and 40%.

When compared to the 2015 study findings (see Table 1), the percentage who rated each item as excellent or good was significantly lower in 2024, with the largest differences in ratings found for Metrolink rail service (-28%), bus service (-25%), rideshare/carpool matching programs (-24%), and vanpool programs (-22%).[4]

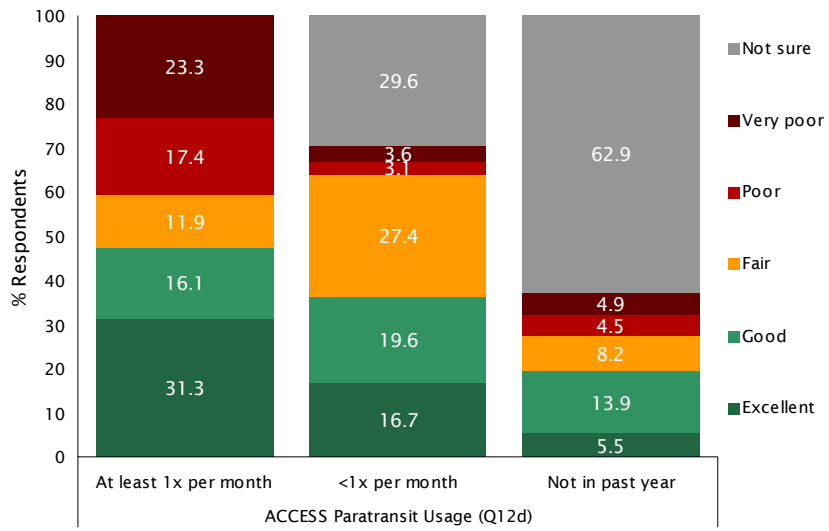
TABLE 1 RATING OF TRANSPORTATION SERVICES IN ORANGE COUNTY BY STUDY YEAR

	Study Year			Change in % Excellent + Good 2015 to 2024
	2024	2015	2011	
The overall quality and condition of city streets	43.0	54.3	54.0	-11.2†
The overall quality and condition of the 91 Express Lanes	45.9	58.6	63.4	-12.7†
Bikeway planning	39.8	53.6	57.6	-13.8†
Road and freeway planning	38.9	52.8	53.4	-13.9†
The overall transportation system	38.2	54.0	48.9	-15.8†
The overall quality and condition of freeways	46.7	62.7	61.4	-16.0†
ACCESS Paratransit services for people with disabilities	51.3	71.6	73.7	-20.2†
Vanpool programs	36.2	58.1	60.5	-21.9†
Rideshare and carpool matching programs	38.7	63.0	59.7	-24.3†
Bus service	36.7	61.5	59.5	-24.9†
Metrolink rail service	36.4	63.9	66.1	-27.5†
The overall quality and condition of the 405 Express Lanes	54.0	N/A	N/A	N/A

† Statistically significant change ($p < 0.05$) between the 2015 and 2024 studies.

Figures 7-11 display how the quality ratings for select services provided by OCTA varied according to respondents' use of the services. In general, respondents who frequently used a transit service or express lanes were more likely to express an opinion regarding the quality of the service when compared to those who had used the service less frequently or not at all.

FIGURE 7 RATING OF ACCESS PARATRANSIT BY ACCESS PARATRANSIT USAGE



4. It is likely the some of the differences in ratings between 2015 and 2024 can be attributed to having a different sampling universe (likely voters) in 2024 when compared to the 2015 survey (adults), as well as more online interviews where the scale is visible and tends to produce a less polarized distribution of responses when compared to telephone interviews.

FIGURE 8 RATING OF METROLINK BY METROLINK BY METROLINK USAGE

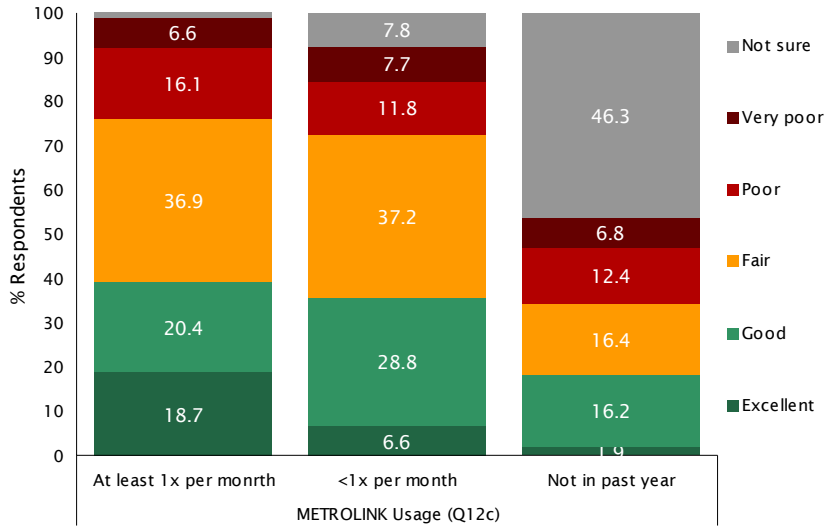


FIGURE 9 RATING OF 91 EXPRESS LANES BY 91 EXPRESS LANES USAGE

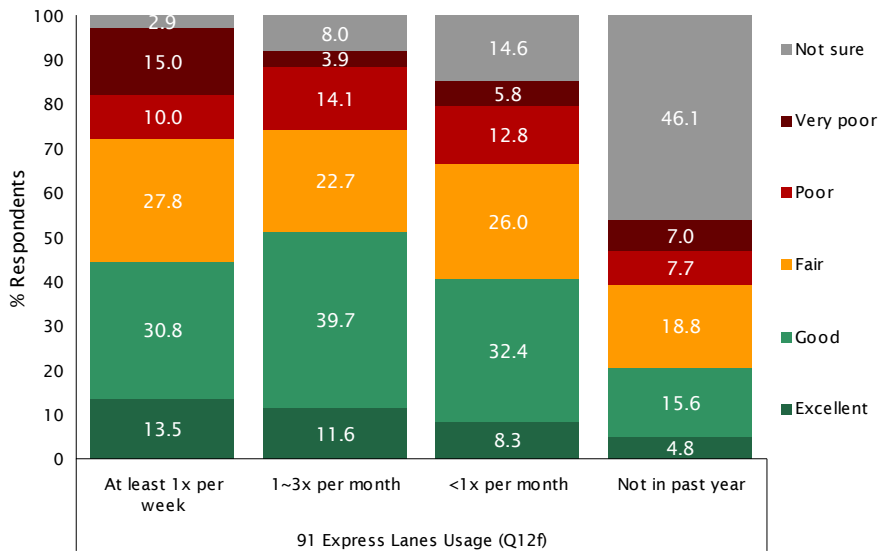


FIGURE 10 RATING OF REGULAR BUS SERVICE BY REGULAR BUS USAGE

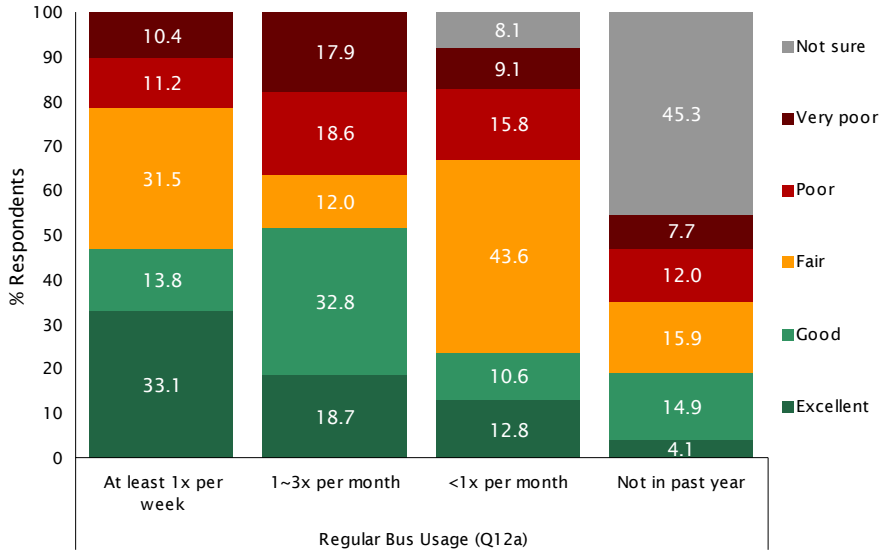
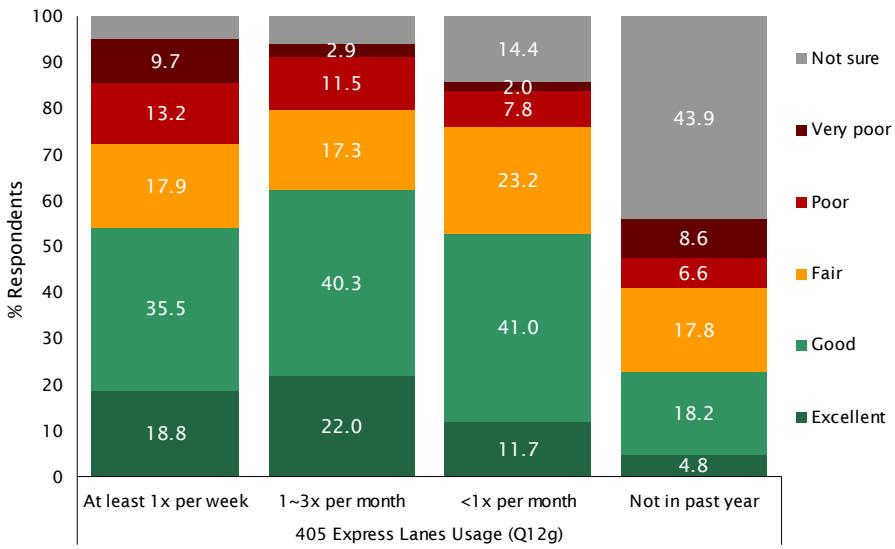


FIGURE 11 RATING OF 405 EXPRESS LANES BY 405 EXPRESS LANES USAGE



Transportation Priorities

Recognizing that any long-term investment plan like M2 must be revisited periodically and adjusted, as needed, to reflect updated policy, financial, and external conditions, the Orange County Transportation Authority (OCTA) periodically conducts a Comprehensive Review of the M2 program. In addition to generating updated financial projections and assessing the impact of policy changes, an important goal of the review is to gauge public and stakeholder support for key components of the plan, as well as projects that could receive discretionary funding in the future.

To assist OCTA in this effort, the survey asked voters to prioritize among a list of 23 transportation projects and services shown in Figure 12 on the next page. The format of Question 5 was straightforward: after informing respondents that there are a variety of improvements that *could* be made to Orange County's transportation system, respondents were asked whether each project shown in Figure 12 should be a high, medium, or low priority—or should no money be spent on the item? To encourage respondents to prioritize, they were reminded that not all of the items can be high priorities.

The survey results provide clear evidence that voters support nearly all of the projects and services that are funded by Measure M—as well as those that could receive funding in the future—as all but two items tested were viewed as a high or medium priority for future funding by a majority of respondents. That said, it is also clear that some projects and services are prioritized over others, with the highest priority assigned to fixing potholes and repairing roadways (92% high or medium priority), coordinating traffic signals on major roadways to improve traffic flow (87%), closing gaps, improving intersections, and reducing traffic congestion on major roads throughout the County (84%), providing transit services to seniors and the disabled at discounted rates (78%), optimizing the existing transportation system (77%), and cleaning up polluted runoff from roads to reduce water pollution and protect local beaches (77%).

At least two-thirds of respondents also assigned a high or medium priority to improving safety and security at transit stops and stations (74%), taking steps to protect the transportation system from flooding, mudslides, sink holes, and other extreme weather events (74%), adding local bus and shuttle services in communities that aren't well served by regional transit services (69%), and preserving and restoring open space land to offset the impacts of freeway improvement projects (68%).

Projects and services that were prioritized in the third tier (60%-67% high or medium priority) included modifying streets so they can safely accommodate all forms of transportation including cars, transit, pedestrians and bicyclists (65%), expanding METROLINK rail service (62%), improving ACCESS paratransit service for people with disabilities (62%), improving access to METROLINK stations using shuttles, light rail, and other transit services (62%), widening freeways (62%), and constructing roads over or under rail tracks where needed to improve traffic flow (61%).

Although still rated as a high or medium priority by a majority of respondents, making it easier for transit riders to get to their final destination by offering shuttles, e-bikes, e-scooters, and rideshare services at transit stations (58%), expanding bus service (57%), providing free assistance and tow truck service to motorists who break down on freeways (57%), creating a network

of light rail streetcars, similar to the San Diego trolley system (55%), and improving the network of bike lanes (52%) were viewed as lesser priorities.

Finally, among all the projects and services tested, just two were viewed as a high or medium priority by less than half of Orange County voters: building additional toll lanes to help relieve traffic congestion (34%) and expanding vanpool programs (33%).

Question 5 *There are a variety of improvements that could be made to Orange County's transportation system. As I read the following list of improvements, please indicate whether you think it should be a high priority, a medium priority, or a low priority. If you think no money should be spent on this project, please say so. Please keep in mind that not all of the improvements can be high priorities.*

FIGURE 12 TRANSPORTATION PRIORITIES

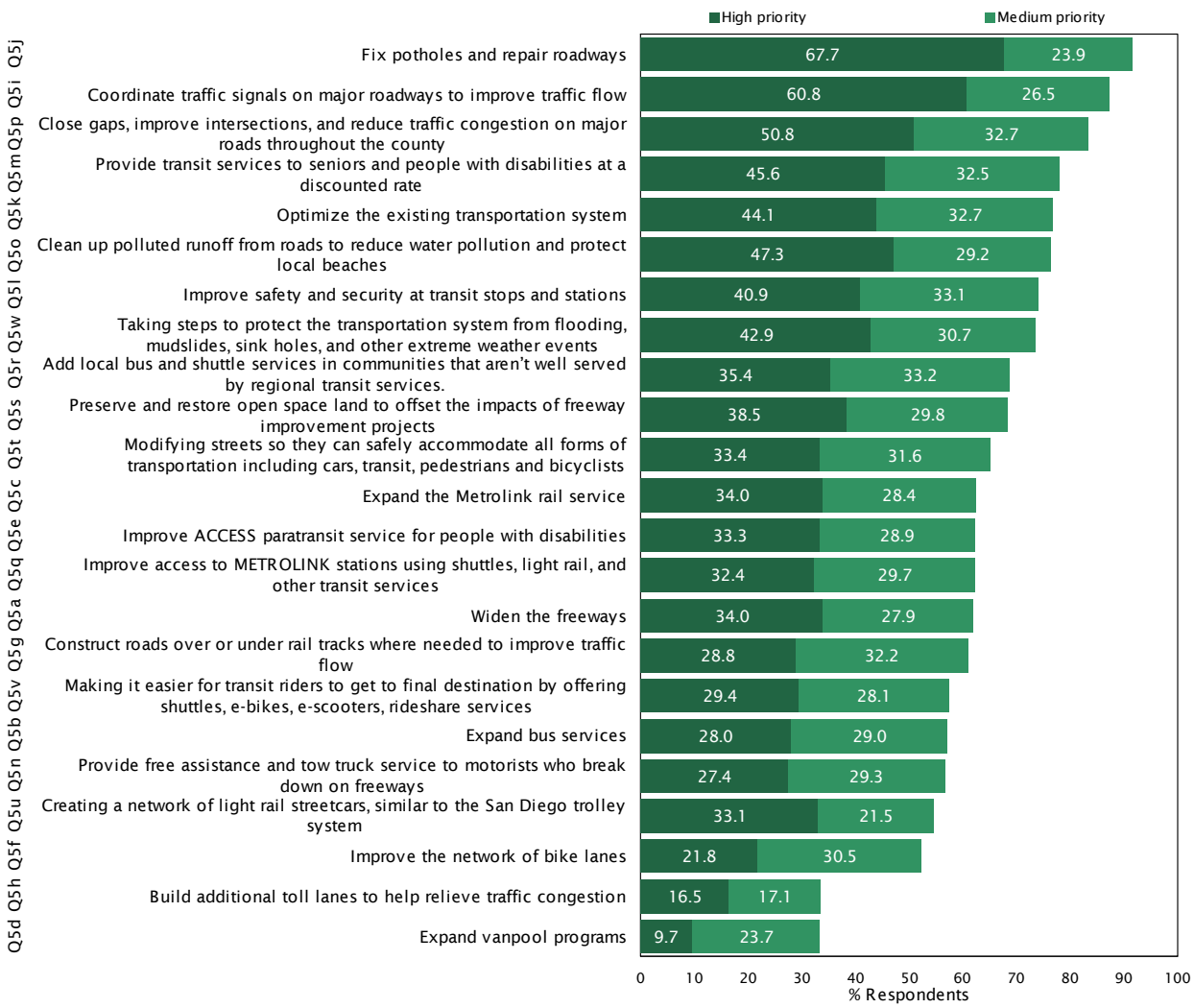


Table 2 shows how the percentage of respondents who rated each item as a *high* priority varied by Supervisorial District, whereas Table 3 calculates the change in the percentage who rated each project a high priority between the 2015 and 2024 surveys. When compared to the 2015 study, most of the projects and services tested experienced a statistically significant decline in the percentage who rated the item a *high* priority, with the largest decreases found for cleaning up polluted runoff from roads to reduce water pollution and protect local beaches (-18%), widening freeways (-16%), and improving ACCESS paratransit service for people with disabilities (-16%).

TABLE 2 TRANSPORTATION PRIORITIES BY SUPERVISORIAL DISTRICT (SHOWING % HIGH PRIORITY

	Supervisorial District				
	One	Two	Three	Four	Five
Fix potholes and repair roadways	75.5	63.1	65.8	74.4	60.6
Coordinate traffic signals on major roadways to improve traffic flow	68.7	62.2	57.0	54.6	61.4
Close gaps, improve intersections, reduce traffic congestion on major roads	54.2	48.8	51.3	50.2	49.1
Clean up runoff from roads to reduce water pollution, protect beaches	55.7	56.0	38.8	48.1	42.7
Provide transit services to seniors and the disabled at a discounted rate	52.2	52.8	42.9	44.9	38.7
Optimize the existing transportation system	51.9	42.4	41.1	40.5	43.9
Taking steps to protect transportation system from flooding, mudslides, sink holes, extreme events	46.7	48.6	44.7	35.6	39.6
Improve safety and security at transit stops and stations	48.7	48.4	33.3	51.8	29.2
Preserve, restore open space to offset impacts of freeway projects	40.8	44.0	37.3	30.4	40.3
Add bus, shuttle services in communities that aren't well served by transit	37.8	39.3	36.0	38.8	27.7
Expand the Metrolink rail service	25.3	39.5	37.8	36.3	32.9
Widen the freeways	34.9	39.4	34.4	35.6	28.2
Modifying streets so they can safely accommodate all forms of transportation	40.7	35.9	26.0	34.0	32.6
Improve ACCESS paratransit service for people with disabilities	33.7	39.6	31.9	42.1	24.2
Creating a network of light rail streetcars, similar to the San Diego trolley system	31.6	37.7	32.1	31.9	33.5
Improve access to Metrolink stations using shuttles, light rail, other services	32.2	35.1	31.9	33.0	30.9
Making it easier for transit riders to get to final destination, offering shuttles, e-bikes, e-scooters, rideshare	35.4	30.1	27.7	29.6	25.3
Construct roads over or under rail tracks where needed to improve traffic flow	32.7	29.5	27.3	30.1	25.5
Expand bus services	25.2	34.5	29.2	30.7	23.3
Provide free towing, assistance to motorists who break down on freeways	28.0	41.8	25.6	34.9	14.2
Improve the network of bike lanes	26.5	25.0	17.9	16.4	23.6
Build additional toll lanes to help relieve traffic congestion	19.6	22.8	15.1	13.7	13.5
Expand vanpool programs	10.4	10.2	10.1	10.9	7.5

TABLE 3 TRANSPORTATION PRIORITIES BY STUDY YEAR

	Study Year			Change in % High Priority 2015 to 2024
	2024	2015	2011	
Optimize the existing transportation system	44.1	41.1	43.2	+2.9
Expand the Metrolink rail service	34.0	31.9	33.0	+2.2
Improve access to Metrolink stations using shuttles, light rail, other services	32.4	30.3	N/A	+2.1
Preserve, restore open space to offset impacts of freeway projects	38.5	38.4	N/A	+0.1
Fix potholes and repair roadways	67.7	70.6	67.4	-2.9
Add bus, shuttle services in communities that aren't well served by transit	35.4	39.0	N/A	-3.6
Coordinate traffic signals on major roadways to improve traffic flow	60.8	65.1	65.1	-4.4†
Improve safety and security at transit stops and stations	40.9	46.2	N/A	-5.2†
Improve the network of bike lanes	21.8	27.4	22.3	-5.6†
Expand bus services	28.0	34.3	37.2	-6.3†
Construct roads over or under rail tracks where needed to improve traffic flow	28.8	36.8	35.6	-8.0†
Expand vanpool programs	9.7	18.2	18.7	-8.5†
Build additional toll lanes to help relieve traffic congestion	16.5	25.5	31.3	-9.0†
Close gaps, improve intersections, reduce traffic congestion on major roads	50.8	61.8	N/A	-10.9†
Provide free towing, assistance to motorists who break down on freeways	27.4	38.8	N/A	-11.4†
Provide transit services to seniors and the disabled at a discounted rate	45.6	60.3	N/A	-14.7†
Improve ACCESS paratransit service for people with disabilities	33.3	49.6	24.9	-16.3†
Widen the freeways	34.0	50.4	49.2	-16.4†
Clean up runoff from roads to reduce water pollution, protect beaches	47.3	64.8	N/A	-17.5†
Modifying streets so they can safely accommodate all forms of transportation	33.4	N/A	N/A	N/A
Creating a network of light rail streetcars, similar to the San Diego trolley system	33.1	N/A	N/A	N/A
Making it easier for transit riders to get to final destination, offering shuttles, e-bikes, e-scooters, rideshare	29.4	N/A	N/A	N/A
Taking steps to protect transportation system from flooding, mudslides, sink holes, extreme events	42.9	N/A	N/A	N/A

† Statistically significant change ($p < 0.05$) between the 2015 and 2024 studies.

Although the percentage who rated many items a *high* priority changed significantly between 2015 and 2024 as shown in Table 3, the *relative* ranking of projects demonstrated greater consistency during this period—especially among top tier projects. Table 4 on the next page shows the rank order of projects tested in 2024, how that order compares to 2015 and 2011, as well as

the change in rank positions between 2015 and 2024. As shown in the table, the top five projects in 2024 were also the top five projects in 2015, with just a slight reordering of position. The largest changes in rank position were found for providing free assistance and tow truck service to motorists who break down on freeways (-9), improving ACCESS paratransit service for people with disabilities (-7), and widening freeways (-6).[5]

TABLE 4 TRANSPORTATION PRIORITIES, SHOWING HIGH PRIORITY RANKING BY STUDY YEAR

	Study Year			Change in High Priority Ranking
	2024	2015	2011	2015 to 2024
Fix potholes and repair roadways	1	1	1	0
Coordinate traffic signals on major roadways to improve traffic flow	2	2	2	0
Close gaps, improve intersections, reduce traffic congestion on major roads	3	4	N/A	+1
Clean up runoff from roads to reduce water pollution, protect beaches	4	3	N/A	-1
Provide transit services to seniors and the disabled at a discounted rate	5	5	N/A	0
Optimize the existing transportation system	6	9	4	+3
Taking steps to protect transportation system from flooding, mudslides, sink holes, extreme events	7	N/A	N/A	N/A
Improve safety and security at transit stops and stations	8	8	N/A	0
Preserve, restore open space to offset impacts of freeway projects	9	12	N/A	+3
Add bus, shuttle services in communities that aren't well served by transit	10	10	N/A	0
Expand the Metrolink rail service	11	15	7	+4
Widen the freeways	12	6	3	-6
Modifying streets so they can safely accommodate all forms of transportation	13	N/A	N/A	N/A
Improve ACCESS paratransit service for people with disabilities	14	7	9	-7
Creating a network of light rail streetcars, similar to the San Diego trolley system	15	N/A	N/A	N/A
Improve access to Metrolink stations using shuttles, light rail, other services	16	16	N/A	0
Making it easier for transit riders to get to final destination, offering shuttles, e-bikes, e-scooters, rideshare	17	N/A	N/A	N/A
Construct roads over or under rail tracks where needed to improve traffic flow	18	13	6	-5
Expand bus services	19	14	5	-5
Provide free towing, assistance to motorists who break down on freeways	20	11	N/A	-9
Improve the network of bike lanes	21	17	10	-4
Build additional toll lanes to help relieve traffic congestion	22	18	8	-4
Expand vanpool programs	23	19	11	-4

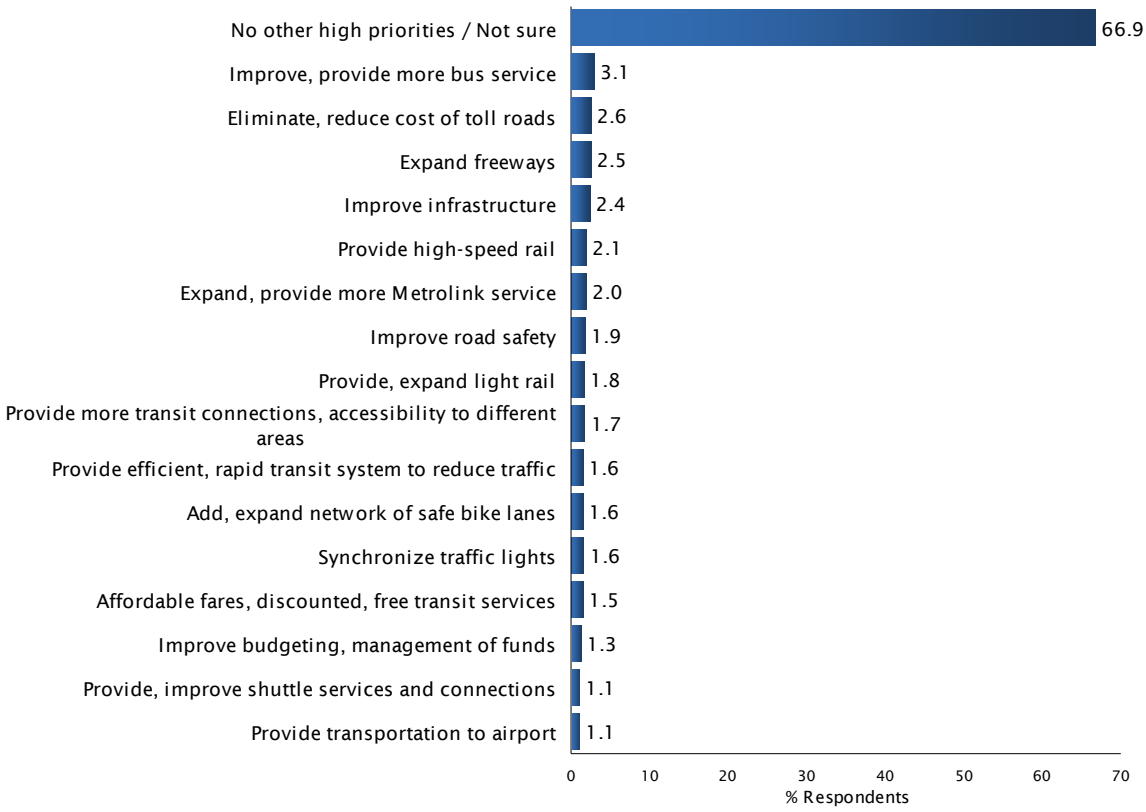
ADDITIONAL PRIORITIES? Recognizing that the list of projects and services tested in Question 5 was not exhaustive of all potential uses of M2 funds, Question 6 asked respondents whether there was a transportation project or improvement not mentioned in Question 5 that they think should be a high priority for Orange County's future. Question 6 was administered in an open-ended manner, allowing respondents to mention any project or improvement that came to mind without being prompted by—or constrained to—a particular list of options. True North subsequently reviewed the verbatim responses and grouped them into the categories shown in Figure 13 on the next page.

Two-thirds of respondents (67%) indicated that no additional projects or improvements came to mind. The remaining responses were spread across a wide variety of categories, none of which exceeded 3% of responses. The top responses included improving/providing more bus service (3%), eliminating/reducing the cost of toll roads (3%), expanding freeways (3%), improving infrastructure (2%), providing high-speed rail service (2%), and expanding METROLINK service (2%).

5. Because four new items were tested in 2024, the net shift in positions for those items at the bottom of the list is greater than it would be if the number of items remained the same as in 2015.

Question 6 *Is there a transportation project or improvement I didn't mention that you think should be a high priority for Orange County's future?*

FIGURE 13 OTHER HIGH PRIORITY PROJECTS OR IMPROVEMENTS



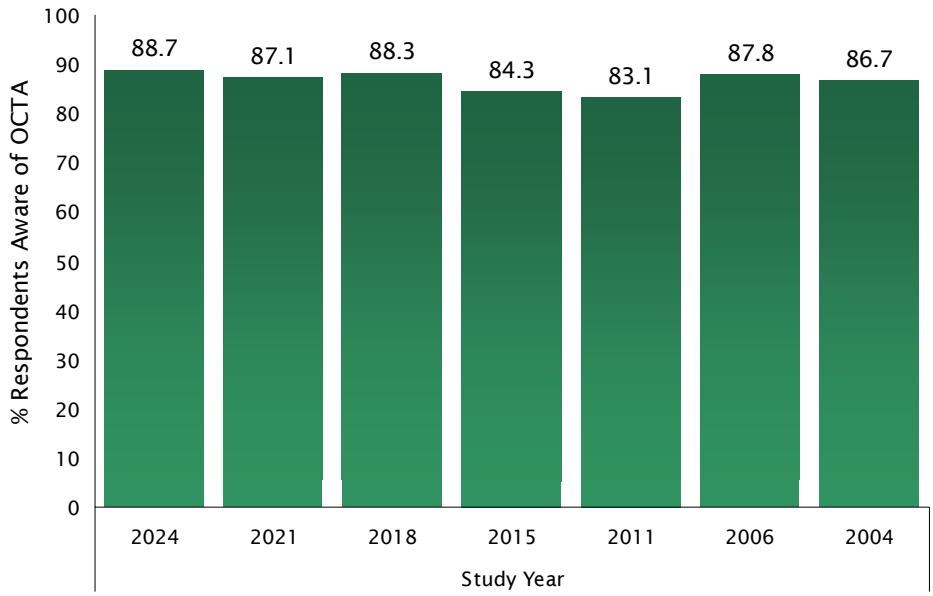
OCTA & Measure M

One of the goals of this study was to gauge public awareness and perceptions of the Orange County Transportation Authority, as well as Measure M. To what extent are residents aware of OCTA and Measure M? Do they have a favorable or unfavorable opinion of the Authority? And how do they view OCTA on issues of fiscal responsibility, trust, and performance in delivering transportation improvements to the region?

AIDED AWARENESS The first question this series simply asked respondents whether—prior to taking the survey—they had heard of the Orange County Transportation Authority, also known as OCTA. As shown in Figure 14 below, nearly nine-in-ten respondents (89%) in 2024 affirmed that they had heard of OCTA prior to the interview. Over the past 20 years, awareness of OCTA has remained quite stable, ranging from a low of 83% to a high of 89%.

Question 7 *Prior to taking this survey, had you heard of the Orange County Transportation Authority, also known as O.C.T.A?*

Figure 14 Heard of OCTA by Study Year



Figures 15-18 display how awareness of OCTA varied across voter subgroups. When compared to their respective counterparts, those who had resided in the County at least 10 years, individuals who were aware of Measure M, those who self-reported being Caucasian, African American, or 'other/mixed' ethnicity, respondents 30 years of age or older, and those who completed the survey in English were the most likely to indicate they had heard of OCTA prior to taking the survey.

Figure 15 Heard of OCTA by Years in Orange County, Primary Mode & Heard of Measure M

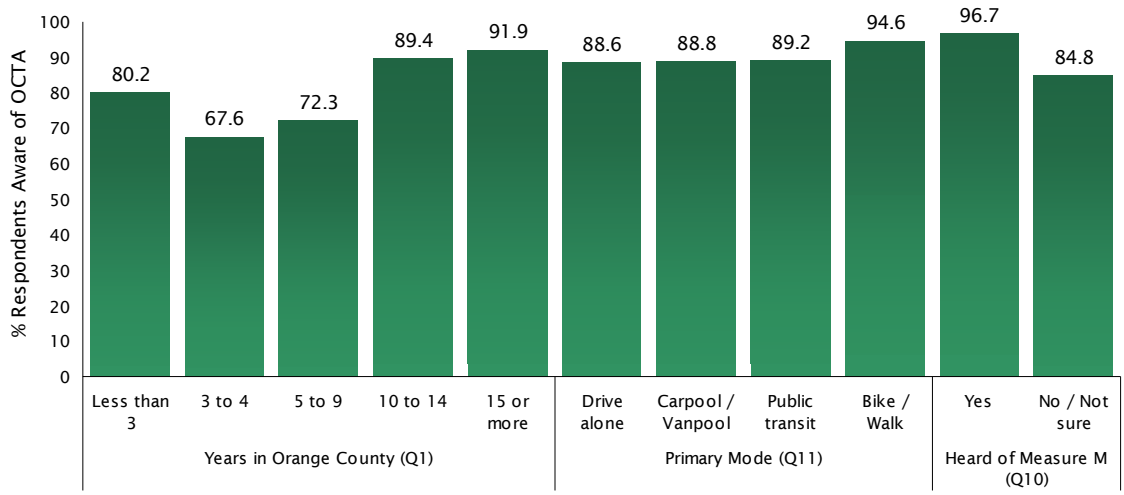


Figure 16 Heard of OCTA by Regular Bus Usage, 91 Express Lanes Usage & 405 Express Lanes Usage

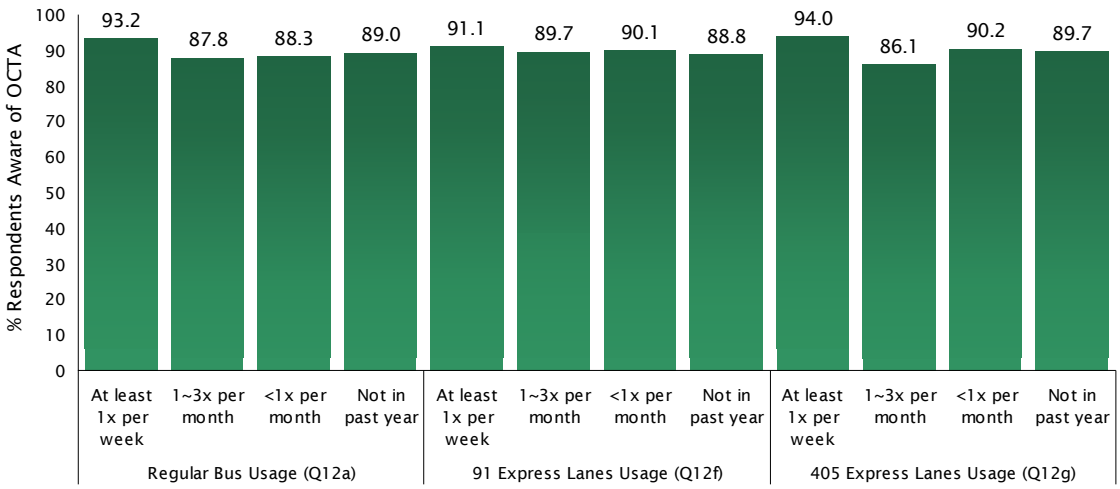


Figure 17 Heard of OCTA by Party, Ethnicity & Hsld Income

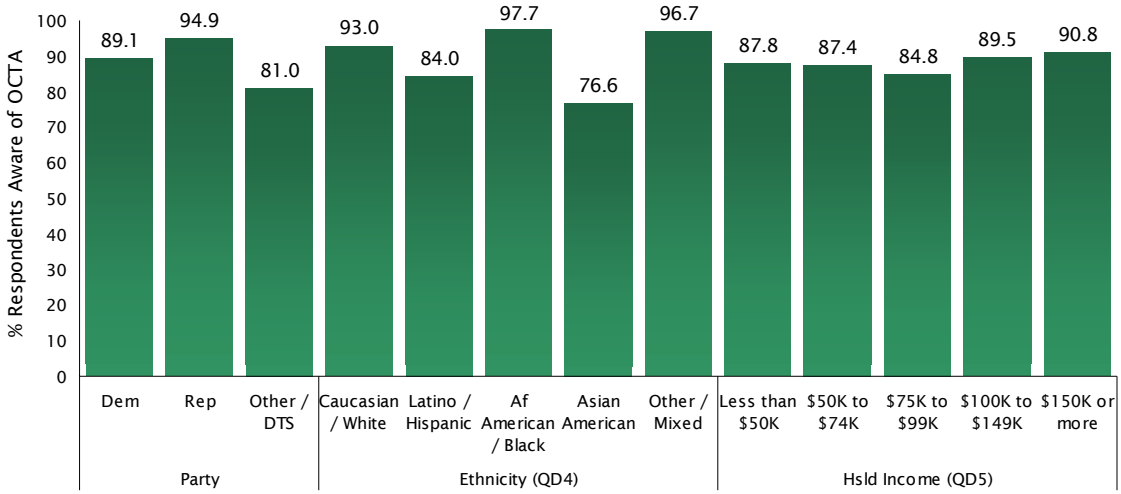
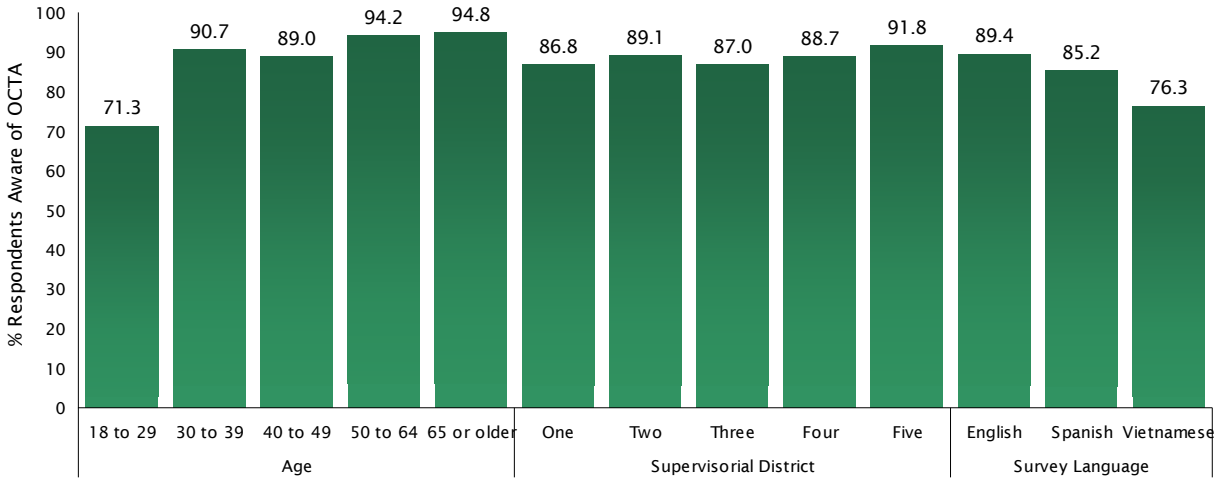


FIGURE 18 HEARD OF OCTA BY AGE, SUPERVISORIAL DISTRICT & SURVEY LANGUAGE



OPINION OF OCTA After clarifying for respondents that OCTA is the public agency responsible for planning, funding, managing, and developing Orange County's transportation system, Question 8 asked respondents whether they generally have a favorable or unfavorable opinion of OCTA—or if they have no opinion either way. Approximately 21% of respondents in 2024 indicated that they do not have an opinion of OCTA or preferred not to answer the question. Among the remaining respondents, opinions of OCTA were decidedly positive. Fifty-nine percent (59%) stated that they have a favorable opinion of OCTA, whereas 20% offered an unfavorable opinion.

Question 8 *To clarify, the Orange County Transportation Authority or O.C.T.A. is a public agency responsible for planning, funding, managing and developing Orange County's transportation system, including freeways, streets and roads, bus and transit services, and the 91 and 405 Express Lanes. OCTA does NOT manage the 73, 133, 241 or 261 toll roads. In general, would you say you have a favorable or unfavorable opinion of the Orange County Transportation Authority - or do you have no opinion either way?*

FIGURE 19 OPINION OF OCTA BY STUDY YEAR

† Statistically significant change ($p < 0.05$) between the 2021 and 2024 studies.

When compared to the 2021 study findings, the percentage who did not have an opinion of OCTA or preferred to not answer the question decreased, as did the percentage who had a somewhat unfavorable opinion of OCTA (-3%). Counterbalancing these changes was a statistically significant increase in the percentage of voters who had a somewhat favorable opinion of OCTA (+4%) between 2021 and 2024. As shown in the figure, the percentage of respondents with a favorable opinion of OCTA has steadily increased over time, from 42% in 2011 to 59% in 2024.

The following figures recalculate the results of Question 8 to be among just those who held an opinion of OCTA, favorable or unfavorable. The largest differences in opinions of OCTA occur by length of residence, primary mode, frequency of bus usage, ethnicity, and Supervisorial District.

FIGURE 20 OPINION OF OCTA BY YEARS IN ORANGE COUNTY, PRIMARY MODE & HEARD OF MEASURE M

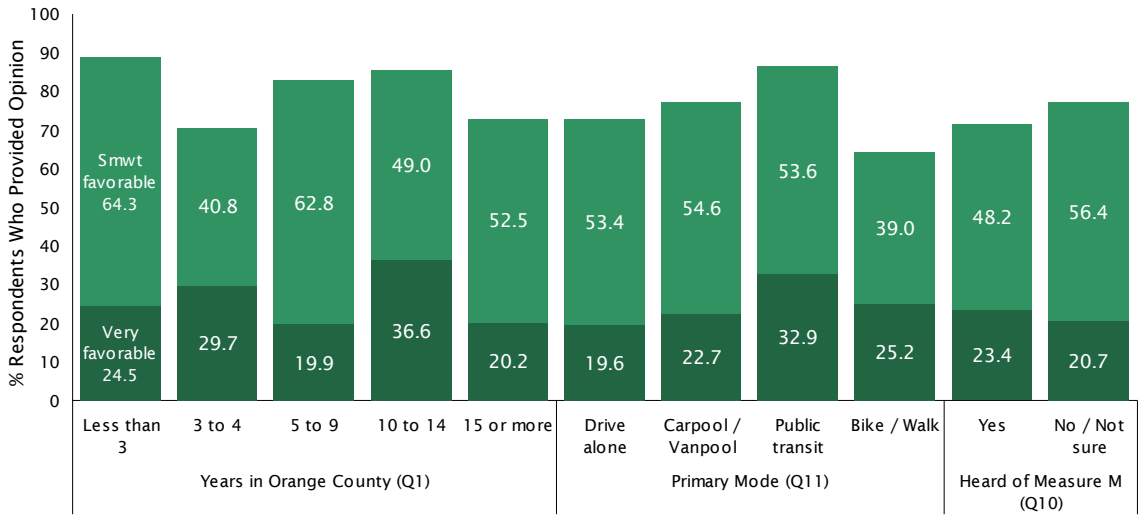


FIGURE 21 OPINION OF OCTA BY REGULAR BUS USAGE, 91 EXPRESS LANES USAGE & 405 EXPRESS LANES USAGE

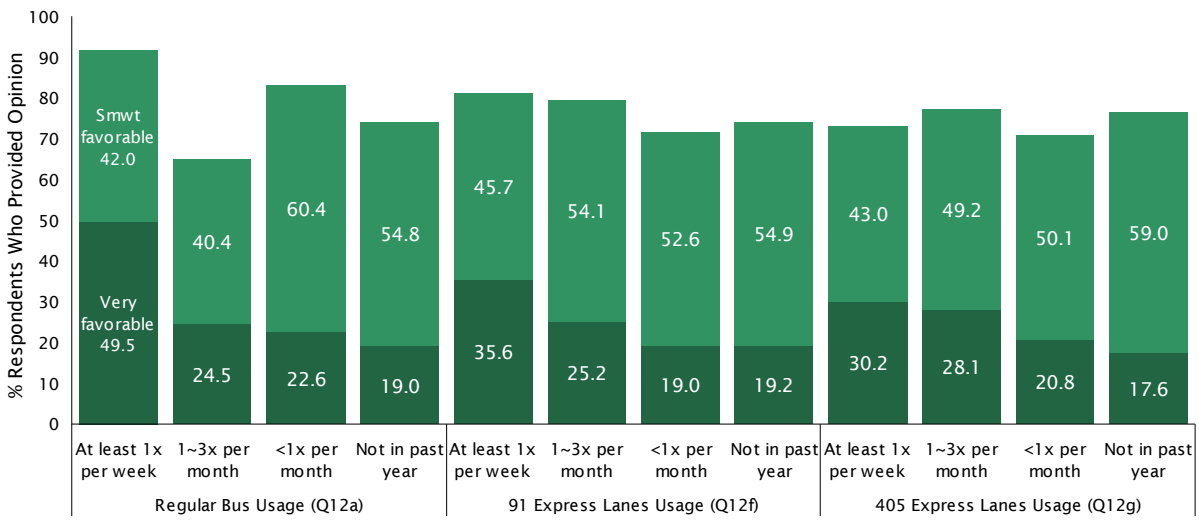


FIGURE 22 OPINION OF OCTA BY PARTY, ETHNICITY & HSLD INCOME

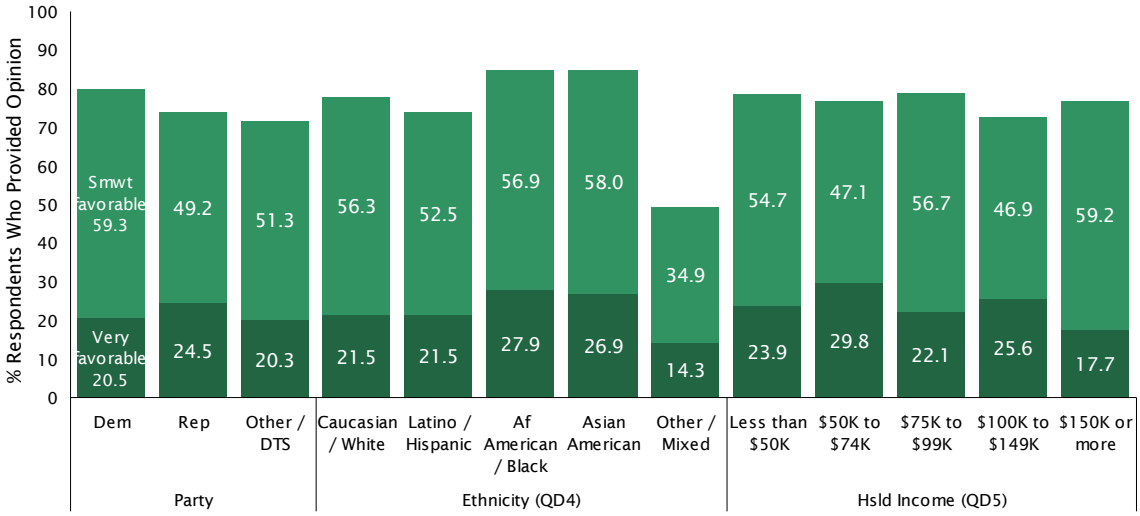
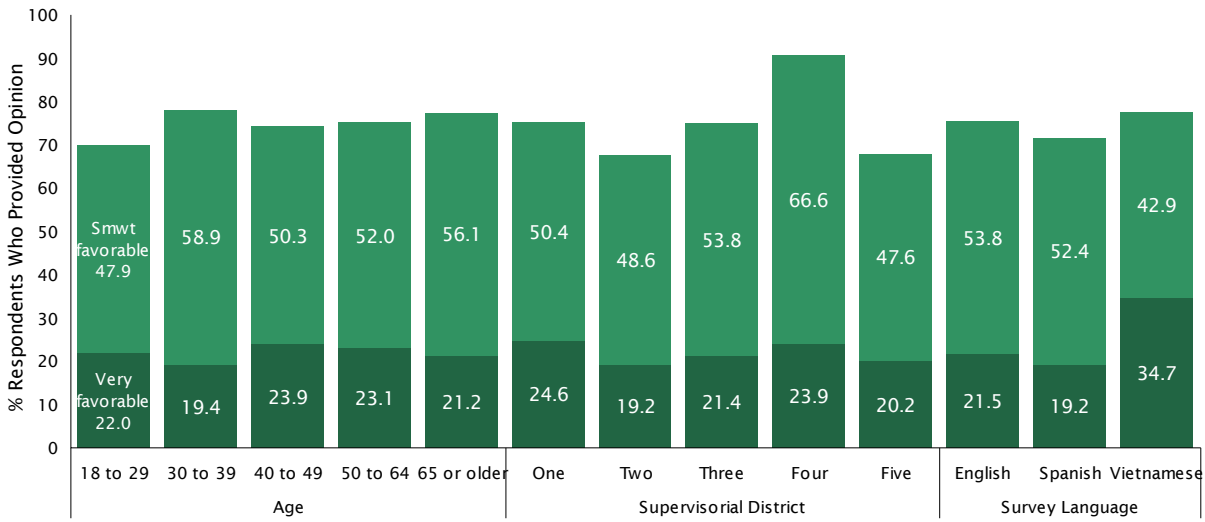


FIGURE 23 OPINION OF OCTA BY AGE, SUPERVISORIAL DISTRICT & SURVEY LANGUAGE



CHARACTERIZING OCTA The next question in this series was designed to profile how residents perceive OCTA on a variety of dimensions. Specifically, Question 9 provided a list of six statements about OCTA and asked respondents whether they agree or disagree with the statement—or have no opinion. Figure 24 on the next page presents the statements tested in truncated form,[6] as well as respondents' characterizations of OCTA.

On most dimensions, respondents generally characterized OCTA in a positive manner. A majority of respondents agreed that *OCTA helps our local and regional economies function by improving our transportation system* (63%), *is actively seeking solutions to our transportation issues* (60%), *has made many improvements to Orange County's transportation system in the past five years* (60%), and *is a public agency I trust* (56%). For the aforementioned statements, the remain-

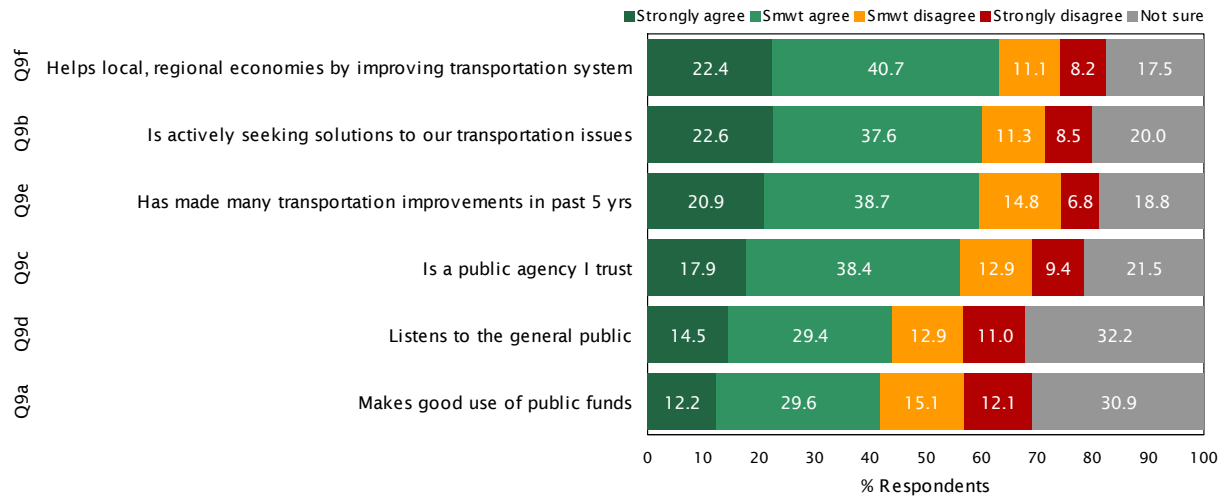
6. For the exact wording of each statement, see Question 9 in *Questionnaire & Toplines* on page 37.

ing respondents tend to be split fairly evenly between those who were unsure and those who disagreed with the statement.

Opinions were more mixed when asked if OCTA *listens to the general public* (44% agree) and *makes good use of public funds* (42%), although those who disagreed with the statements (approximately one-quarter of respondents) were outnumbered by those who were unsure (approximately one-third).

Question 9 *Next, I'm going to read a series of statements. For each that I read, please tell me whether you agree or disagree with the statement. If you don't have an opinion, just say so.*

FIGURE 24 AGREEMENT WITH STATEMENTS ABOUT OCTA



When compared to the 2015 findings, perceptions of OCTA in 2024 declined significantly on three of the dimensions tested (see Table 6), and were consistently the most positive in Supervisorial District 4 (see Table 6).

TABLE 5 AGREEMENT WITH STATEMENTS ABOUT OCTA BY STUDY YEAR

	Study Year			Change in % Agree
	2024	2015	2011	2015 to 2024
Has made many transportation improvements in past 5 yrs	73.4	76.1	75.1	-2.7
Is actively seeking solutions to our transportation issues	75.3	78.4	74.7	-3.1
Listens to the general public	64.8	68.3	65.0	-3.5
Helps local, regional economies by improving transportation system	76.6	80.9	79.0	-4.4†
Makes good use of public funds	60.5	66.1	65.8	-5.6†
Is a public agency I trust	71.6	81.6	79.3	-10.1†

† Statistically significant change ($p < 0.05$) between the 2015 and 2024 studies.

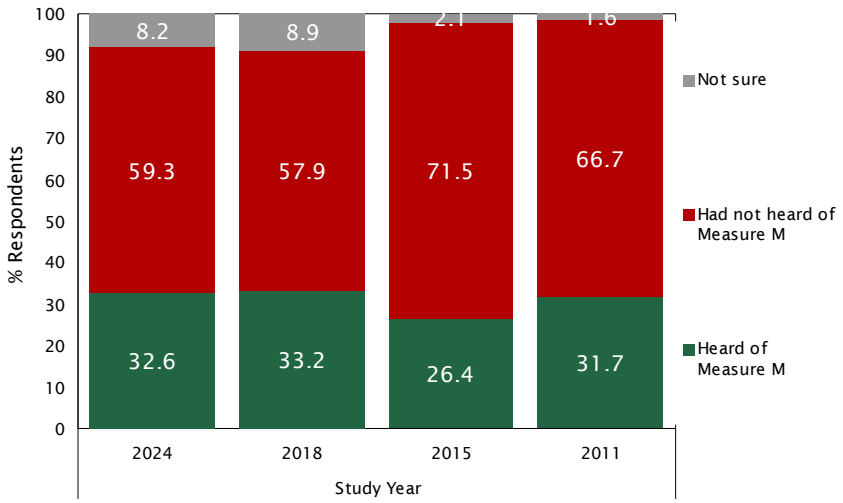
TABLE 6 AGREEMENT WITH STATEMENTS ABOUT OCTA BY OVERALL & SUPERVISORIAL DISTRICT (AMONG THOSE WHO PROVIDED OPINION)

	Overall	Supervisorial District				
		One	Two	Three	Four	Five
Helps local, regional economies by improving transportation system	76.6	77.3	73.0	77.1	85.3	71.5
Is actively seeking solutions to our transportation issues	75.3	73.4	75.5	75.6	83.3	71.0
Has made many transportation improvements in past 5 yrs	73.4	78.9	71.3	68.4	73.8	74.8
Is a public agency I trust	71.6	72.7	68.2	70.0	82.8	65.4
Listens to the general public	64.8	63.9	64.4	65.1	75.6	57.1
Makes good use of public funds	60.5	60.8	58.4	61.1	69.9	54.1

AWARENESS OF MEASURE M The final question in this series addressed respondents' awareness of Measure M—Orange County's voter-approved half cent transportation sales tax. When asked if they had heard of Measure M (also known as OC Go) prior to taking the survey, approximately one-third (33%) indicated that they had heard of the measure, whereas 59% had not heard of Measure M and 8% were unsure (Figure 25). These findings are strikingly similar to the results of the 2018 survey.

Question 10 *Prior to taking this survey, had you heard of Measure M, also known as OC Go Orange County's voter-approved half cent transportation sales tax?*

FIGURE 25 HEARD OF MEASURE M BY STUDY YEAR



Awareness of Measure M in 2024 varied dramatically across voter subgroups, being much higher among longtime Orange County residents (15+ years), African Americans, and voters at least 40 years of age when compared to their respective counterparts (see figure 26-29).

FIGURE 26 HEARD OF MEASURE M BY YEARS IN ORANGE COUNTY & PRIMARY MODE

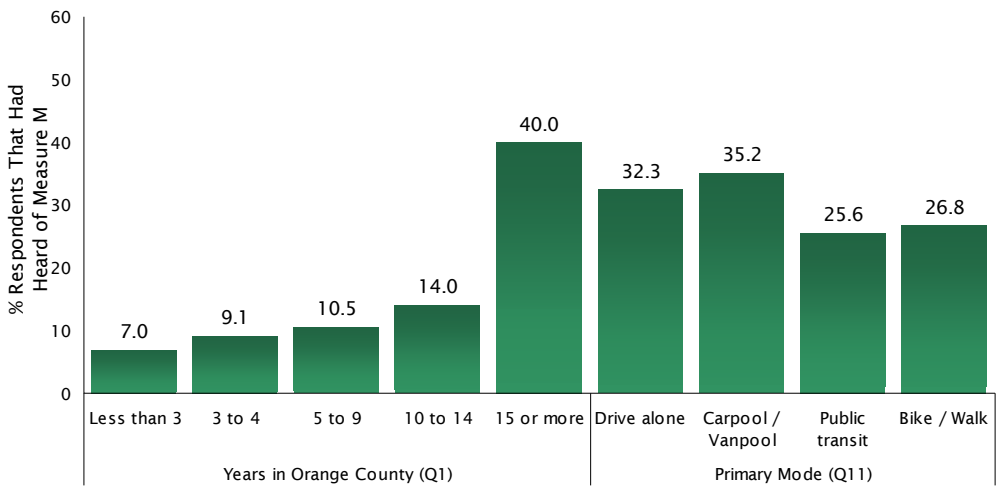


Figure 27 Heard of Measure M by Regular Bus Usage, 91 Express Lanes Usage & 405 Express Lanes Usage

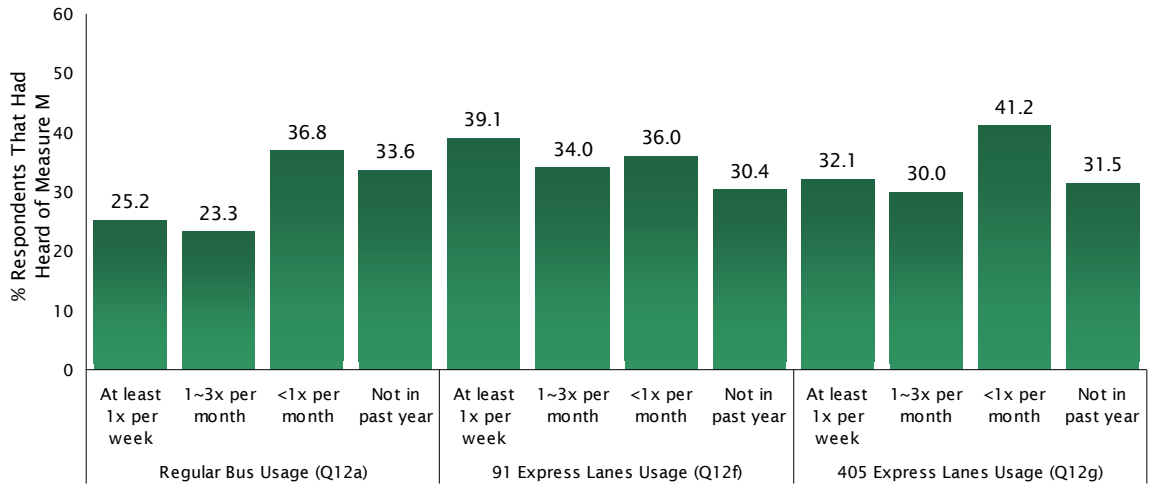


Figure 28 Heard of Measure M by Party, Ethnicity & Hsld Income

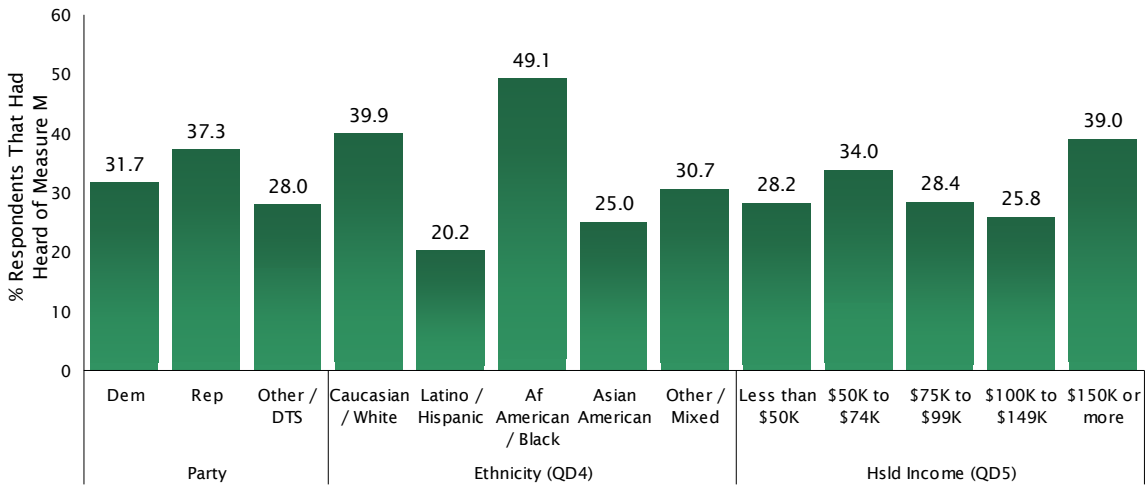
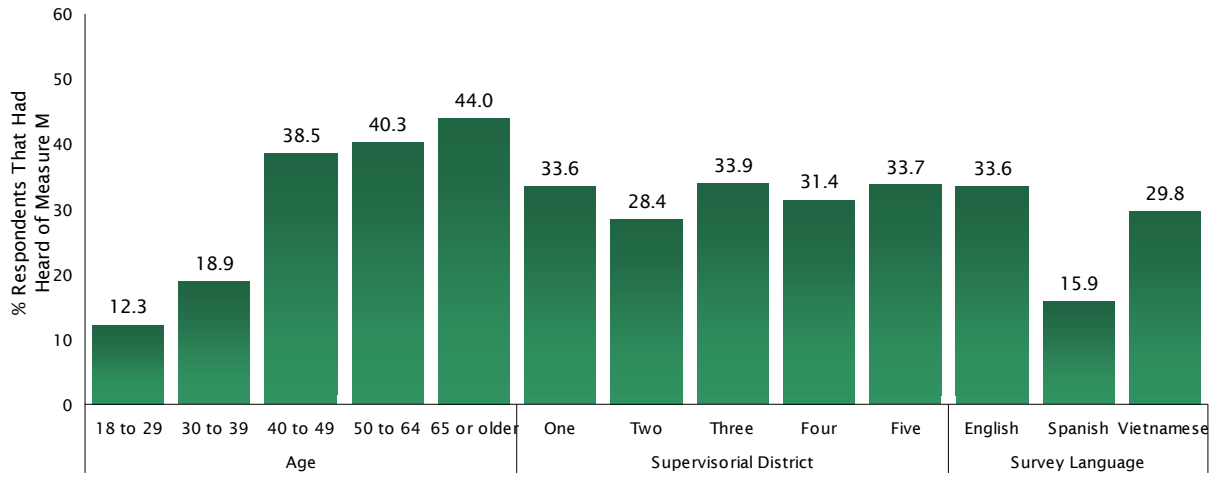


Figure 29 Heard of Measure M by Age, Supervisorial District & Survey Language



Travel Behavior

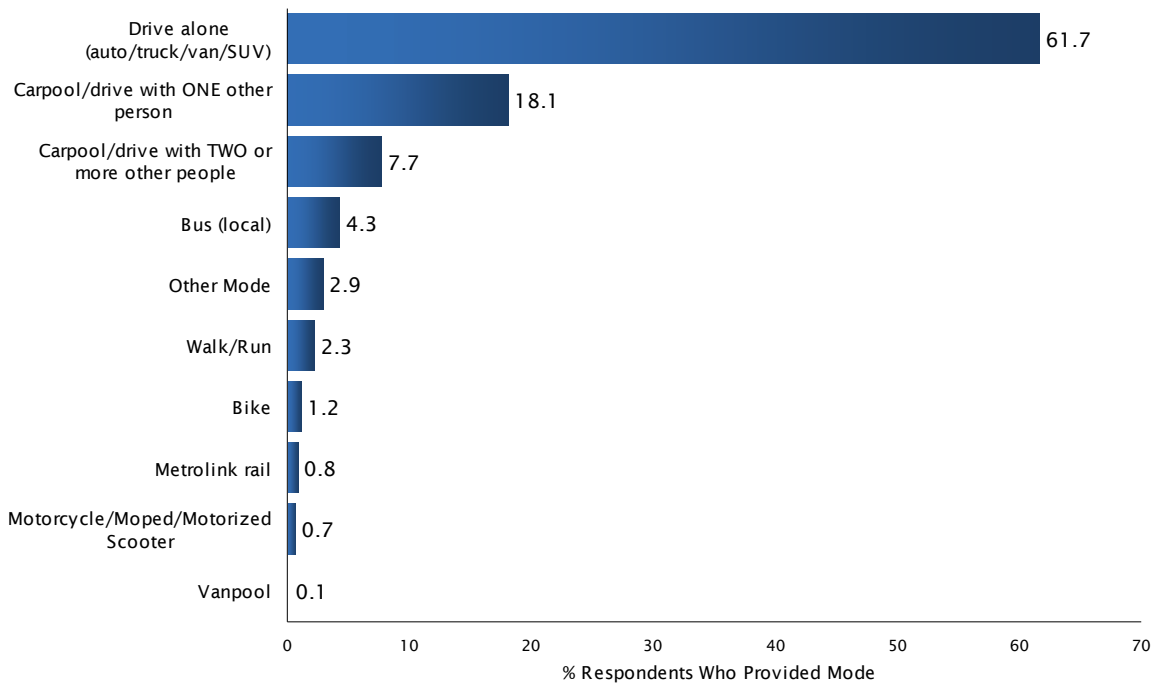
Naturally, an individual's opinions about transportation priorities and policies can be shaped by the type of transportation they primarily use, as well as other aspects of their travel behavior. Accordingly, the survey included a two questions designed to profile respondents' mode use while in Orange County, the results of which are presented in this section.

PRIMARY MODE OF TRANSPORTATION

The first question in this series (Question 11) was designed to identify respondents' *primary* mode of transportation when they travel in Orange County. As shown in Figure 30, the majority (62%) of residents surveyed indicated that they primarily drive alone, whereas one-quarter typically drive with one (18%) or two or more passengers (8%). Overall, 4% stated that they primarily travel by local bus and 8% primarily travel by alternative modes including walking/running, biking, Metrolink, vanpooling, or motorcycle.[7]

Question 11 *Next, I'd like to know about the types of transportation you use when traveling in Orange County. What form of transportation do you use most often when traveling in Orange County?*

FIGURE 30 PRIMARY TRANSPORTATION MODE



Figures 31-32 show how primary mode of travel in 2024 varied by resident age, household income, Supervisorial District, and ethnicity. Although driving alone was the most common primary mode in all subgroups, it was most dominant among those between 50 and 64 years of age, individuals from households earning at least $100,000 annually, residents of Supervisorial Districts 3 and 5, and those who identify as Caucasian. By comparison, use of public transit as a primary mode was highest among residents 18 to 24 years of age, those living in households

7. Although not shown in the graphic, these results are strikingly similar to the findings of the 2021 *Attitudinal & Awareness Survey* conducted by OCTA.

earning less than $50,000 per year, individuals in Supervisorial District 4, and those identifying as Latino/Hispanic.

FIGURE 31 PRIMARY TRANSPORTATION MODE BY AGE & HSLD INCOME

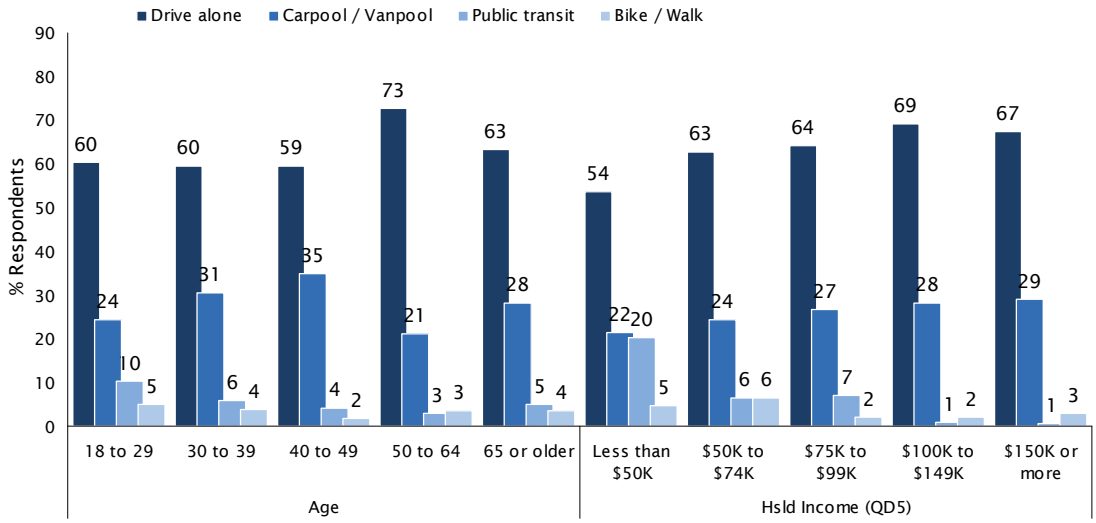
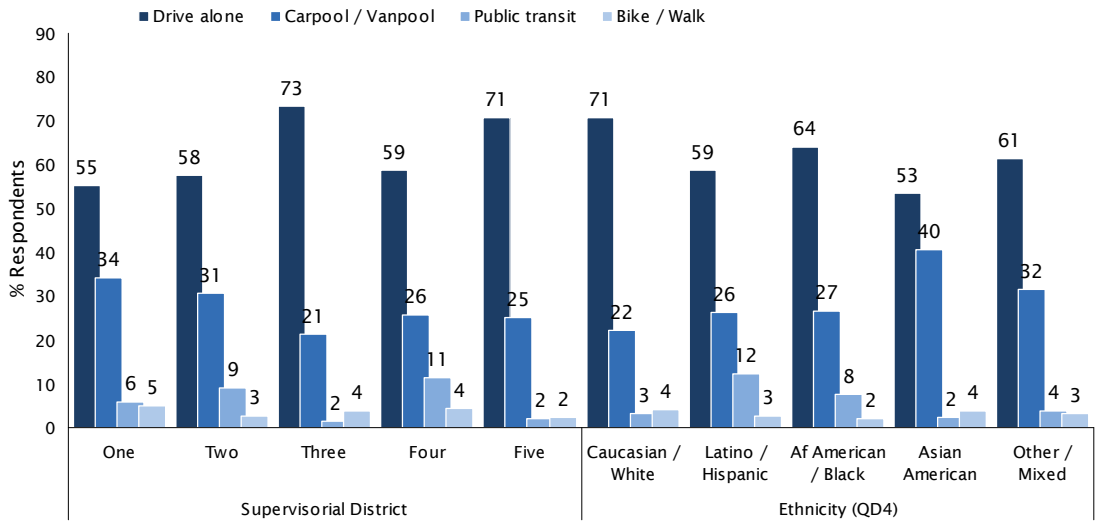


FIGURE 32 PRIMARY TRANSPORTATION MODE BY SUPERVISORIAL DISTRICT & ETHNICITY



USE OF TRANSIT & 91 EXPRESS LANES Having identified respondents' primary mode of travel, the survey next asked respondents how frequently they had used each of the transit and toll road options listed in Figure 33 in the 12 months prior to the interview. Overall, residents reported the highest frequency of use for the 91 Express Lanes Toll Road (53% use; 9% weekly) and 405 Express Lanes (51% use; 11% weekly), followed by Metrolink rail (25% use; 2% weekly), regular bus service (18% use; 6% weekly), community shuttles or trolleys (16% use; 2% weekly), BRAVO! bus rapid transit (7% use; 2% weekly), and ACCESS paratransit service (6% use; 1% weekly). When compared to the 2021 survey, the percentage who indicated they had used the 91 Express Lanes (+14%) and Metrolink rail (+8%) in the 12 months preceding the interview was significantly higher in 2024 (see Table 7).

Question 12 *In the past 12 months, have you used: _____ when traveling in Orange County?*

FIGURE 33 TRANSPORTATION SERVICE USAGE IN PAST 12 MONTHS

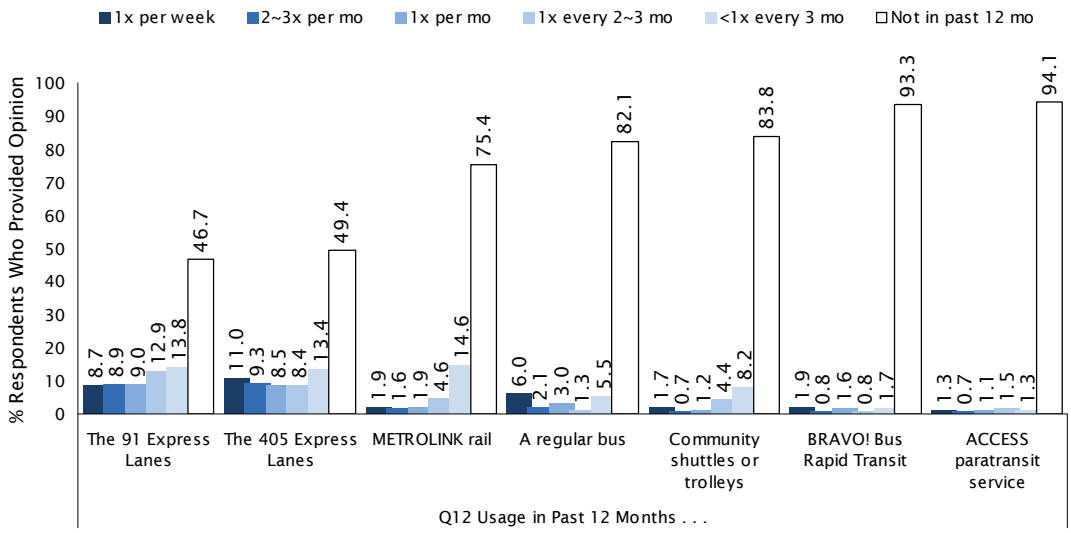


TABLE 7 TRANSPORTATION SERVICE USAGE IN PAST 12 MONTHS BY STUDY YEAR

	Study Year					Change in Usage
	2024	2021	2018	2015	2011	2021 to 2024
The 91 Express Lanes toll road	53.3	39.4	39.7	30.4	37.6	+13.9†
METROLINK rail	24.6	16.3	25.6	18.7	17.7	+8.2†
A regular bus	17.9	15.2	22.7	22.6	23.1	+2.7
ACCESS paratransit service	5.9	6.4	5.1	3.7	4.5	-0.5
BRAVO! Bus Rapid Transit / Express Bus	6.7	9.1	10.7	6.0	5.6	-2.4
Community shuttles or trolleys	16.2	N/A	N/A	N/A	N/A	N/A
The 405 Express Lanes	50.6	N/A	N/A	N/A	N/A	N/A

† Statistically significant change ($p < 0.05$) between the 2021 and 2024 studies.

Figures 34-37 on the next page show how the frequency of using each transit and toll road option in 2024 varied by age, household income, Supervisorial District, and ethnicity. Use of the 91 and 405 Express Lanes was strongly related to household income and most commonly reported by those 40 to 64 years in age. Overall use of transit (Metrolink, regular bus, express bus, and ACCESS paratransit) was most commonly reported by young residents (under 30), those from households earning less than $50,000 annually, residents of Supervisorial District 4, and those identifying as Latino/Hispanic or African American.

FIGURE 34 TRANSPORTATION SERVICE USAGE IN PAST 12 MONTHS BY AGE

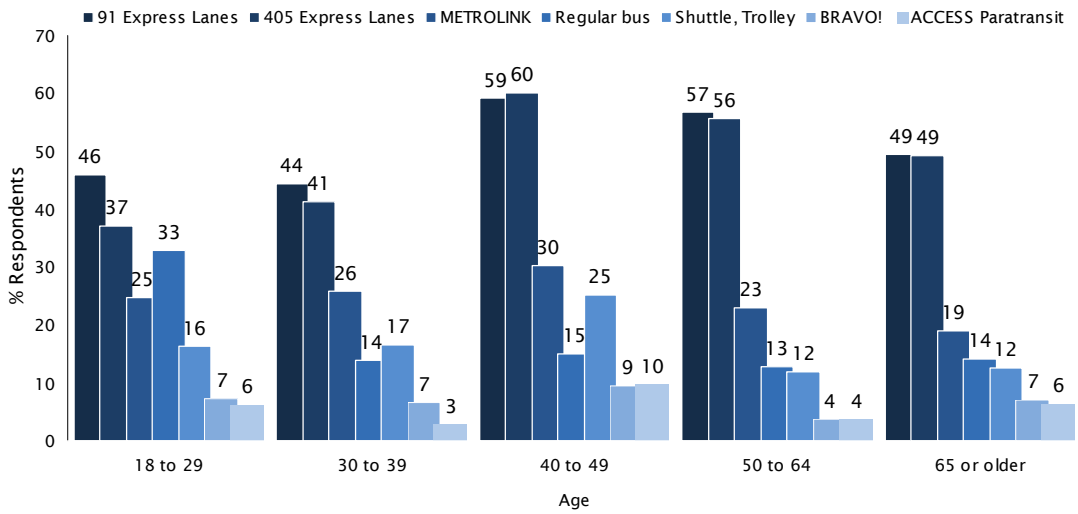


FIGURE 35 TRANSPORTATION SERVICE USAGE IN PAST 12 MONTHS BY HSLD INCOME

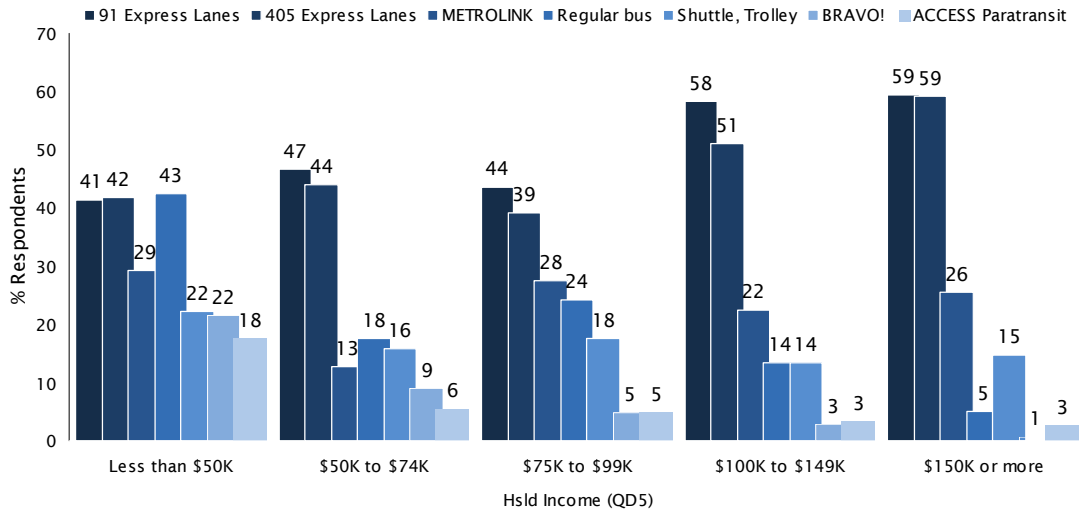


FIGURE 36 TRANSPORTATION SERVICE USAGE IN PAST 12 MONTHS BY SUPERVISORIAL DISTRICT

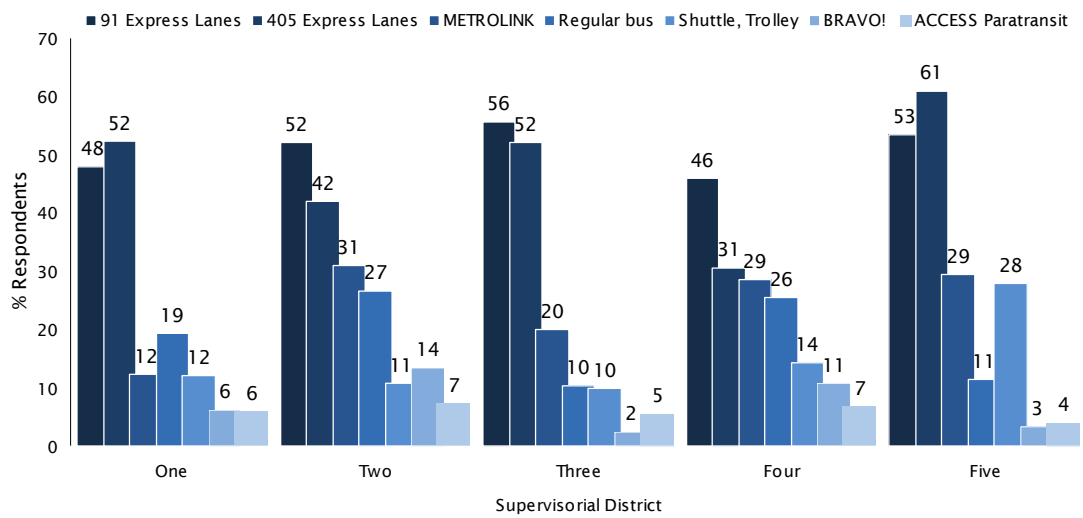
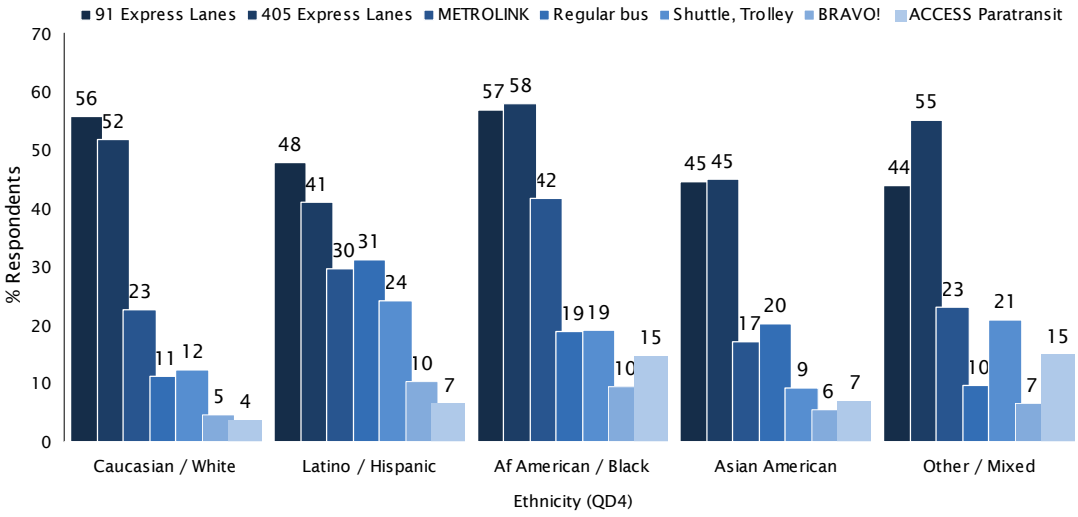


FIGURE 37 TRANSPORTATION SERVICE USAGE IN PAST 12 MONTHS BY ETHNICITY



Background & Demographics

Table 8 Demographics of Sample by Study Year

	Study Year				
	2024	2021	2018	2015	2011
Total Respondents	*1,080*	*2,564*	*2,525*	*2,000*	*2,010*
Supervisorial District					
One	20.6	20.7	22.4	20.8	21.3
Two	14.5	21.3	21.2	22.7	23.8
Three	23.7	17.7	18.5	17.7	18.6
Four	17.4	21.0	20.8	23.6	23.1
Five	23.7	19.2	17.1	18.3	18.4
Years in Orange County (Q1)					
Less than 5	7.5	9.7	11.8	6.0	9.8
5 to 9	8.6	9.9	7.6	6.8	8.7
10 to 14	9.6	7.8	8.6	9.7	12.3
15 or more	73.8	72.2	71.7	77.3	68.9
Prefer not to answer	0.5	0.4	0.4	0.1	0.3
Age (S3)					
18 to 24	11.1	13.7	16.2	14.2	14.2
25 to 34	16.3	18.1	16.5	18.8	18.1
35 to 44	12.7	18.1	17.9	19.3	17.3
45 to 54	15.6	18.7	17.1	18.3	17.0
55 to 64	18.8	13.3	13.2	13.3	11.7
65 or older	25.5	13.6	17.2	13.9	13.7
Prefer not to answer	0.0	4.6	2.0	2.3	7.9
Employment Status (QD1)					
Employed full time	54.3	54.2	49.9	52.2	47.3
Employed part time	7.4	10.7	13.7	13.4	11.0
Student	8.0	7.5	7.5	6.7	9.6
Homemaker	2.5	2.9	3.1	6.8	5.7
Retired	20.9	14.9	16.7	13.4	13.5
Between jobs	3.1	5.1	3.6	3.6	5.5
Disabled	1.8	1.1	1.6	2.6	1.6
Prefer not to answer	2.0	3.8	3.8	1.4	5.9
Ethnicity (QD4)					
Caucasian / White	48.3	36.3	37.6	40.0	39.8
Latino / Hispanic	23.0	31.1	30.6	31.7	29.0
Af Amer / Black	2.9	1.5	2.5	5.1	1.4
Asian American	15.9	19.2	14.7	14.1	15.4
Other / Mixed	4.4	3.3	8.0	7.3	2.8
Prefer not to answer	5.4	8.5	6.6	1.9	11.6
Hsld Income (QD5)					
Less than $25K	5.1	8.6	11.1	15.9	10.5
$25K to $49K	9.8	11.8	17.4	19.3	15.3
$50K to $74K	11.6	17.9	15.2	16.5	13.6
$75K to $99K	14.3	16.7	16.9	13.5	13.0
$100K to $149K	20.8	20.0	13.8	12.5	11.3
$150K or more	30.6	21.9	18.5	12.0	10.3
Prefer not to answer	7.9	3.1	7.1	10.3	25.9
Gender					
Male	49.6	48.7	49.3	50.6	51.8
Female	47.7	48.4	47.3	49.4	48.2
Non-binary	0.6	N/A	N/A	N/A	N/A
Prefer not to answer	2.1	2.9	3.4	0.0	0.0

Table 8 presents the key demographic and background information that was collected during the survey. Although the primary motivation for collecting the background and demographic information was to provide a better insight into how the results of the substantive questions of the survey vary by demographic characteristics (see crosstabulations in Appendix A for a full breakdown of each question), the information is also valuable for understanding the current profile of Orange County's likely voter population.

On that note, it is important to point out that the 2024 survey described in this report was administered to likely November 2024 voters, whereas the prior surveys used for benchmark comparisons were administered to adult residents (regardless of voter registration status). This difference explains some of the variation in demographics when comparing the 2024 sample profile to those in prior years.

METHODOLOGY

The following sections outline the methodology used in the study, as well as the motivation for using certain techniques.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with OCTA to develop a questionnaire that covered the topics of interest and avoided possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects, and priming. Several questions included multiple individual items. Because asking the items in a set order can lead to a systematic position bias in responses, items were asked in random order for each respondent.

Some questions asked in this study were presented only to a subset of respondents. For example, only individuals who indicated they were employed full-time or part-time (Question D1) were asked if they work remotely (Question D2). The questionnaire included with this report (see *Questionnaire & Toplines* on page 37) identifies the skip patterns that were used during the interview to ensure that each respondent received the appropriate questions.

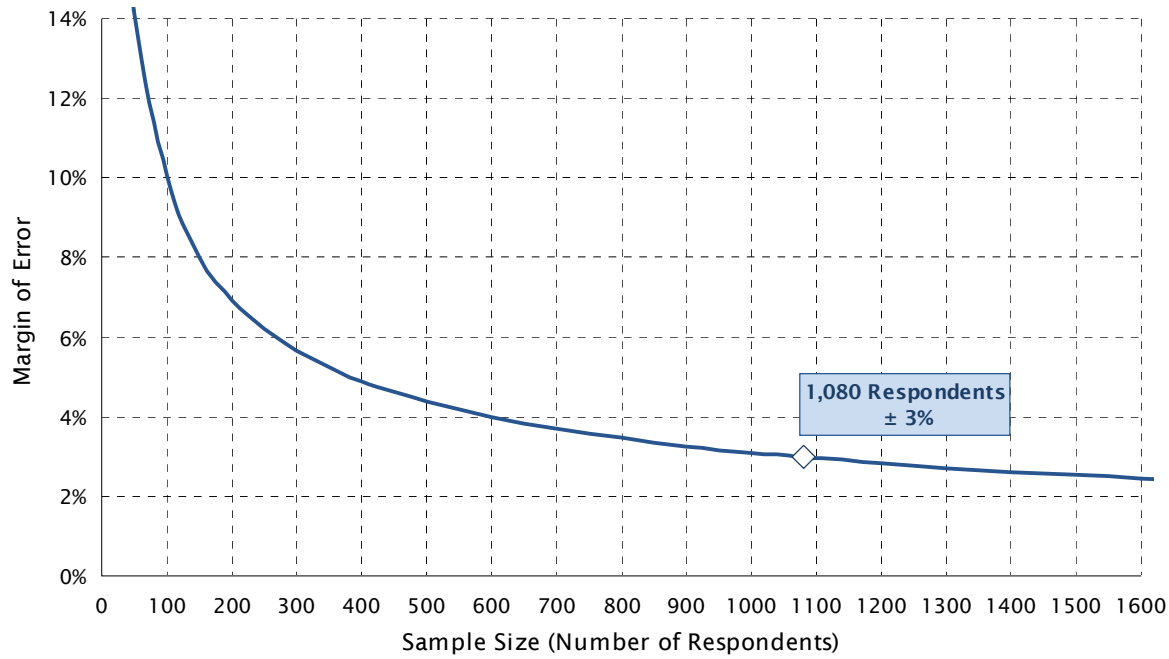
PROGRAMMING, PRE-TEST & TRANSLATION Prior to fielding the survey, the questionnaire was CATI (Computer Assisted Telephone Interviewing) programmed to assist interviewers when conducting telephone interviews. The CATI program automatically navigates skip patterns, randomizes the appropriate question items, and alerts the interviewer to certain types of keypunching mistakes should they occur. The survey was also programmed into a passcode-protected online survey application to allow online participation for sampled voters. The integrity of the questionnaire was pre-tested internally by True North and by dialing into voter households in Orange County prior to formally beginning the survey. Once finalized, the survey was translated into Spanish and Vietnamese to allow for data collection in English, Spanish, or Vietnamese according to a respondent's preference.

SAMPLE The survey was administered to a stratified and clustered random sample of registered voters in Orange County who are likely to participate the November 2024 general election. Consistent with the profile of this universe, the sample was stratified into clusters, each representing a combination of age, gender, household party type, and geographic subregion. Individuals were then randomly selected based on their profile into an appropriate cluster. This method ensures that if a person of a particular profile refuses to participate, they are replaced by an individual who shares their same profile.

STATISTICAL MARGIN OF ERROR By using the probability-based sampling design noted above, True North ensured that the final sample was representative of voters in Orange County who are likely to participate in the November 2024 general election. The results of the survey can thus be used to estimate the opinions of *all* voters likely to participate in that election. Because not all voters participated in the study, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in the survey of 1,080 voters for a particular question and what would have been found if all of the estimated 1,662,395 likely November 2024 voters identified in Orange County had been surveyed for the study.

Figure 38 provides a graphic plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response. For this survey, the maximum margin of error is ± 3.0%.

FIGURE 38 MAXIMUM MARGIN OF ERROR DUE TO SAMPLING



Within this report, figures and tables show how responses to certain questions varied by subgroups such as age, gender, and partisan affiliation. Figure 38 is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

RECRUITING & DATA COLLECTION The survey followed a mixed-method design that employed multiple recruiting methods (telephone, text, and email) and multiple data collection methods (telephone and online). Telephone interviews averaged 18 minutes in length and were conducted during weekday evenings (5:30PM to 9PM) and on weekends (10AM to 5PM). It is standard practice not to call during the day on weekdays because most working adults are unavailable and thus calling during those hours would likely bias the sample.

Voters recruited via email and text were assigned a unique passcode to ensure that only individuals who received an invitation could access the online survey site, and that each individual could complete the survey only one time. During the data collection period, an email reminder notice was also sent to encourage participation among those who had yet to take the survey. A total of 1,080 surveys were completed between April 25 and May 8, 2024.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, weighting, and preparing frequency analyses and cross-tabulations.

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and tables. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and charts for a given question.

TRUE NORTH RESEARCH

OCTA
M2 Review Survey
Final Toplines (n=1,080)
May 2024

Section 1: Introduction to Study
Hi, may I please speak to _____. Hi, my name is _____ and I'm calling from TNR on behalf of OCTA (Oh-See-Tee-Ay) – the Orange County Transportation Authority. We're conducting a survey about important issues in Orange County and I'd like to get your opinions.
If needed: This is a survey about important issues in your community. I'm NOT trying to sell anything and I won't ask for a donation. Your responses will be confidential. *If needed:* The survey should take about 12 minutes to complete. *If needed:* If now is not a convenient time, can you let me know a better time so I can call back? *If the person asks why you need to speak to the listed person or if they ask to participate instead, explain:* For statistical purposes, at this time the survey must only be completed by this particular individual.

Section 2: Quality of Life & Local Issues			
I'd like to begin by asking you a few questions about life in Orange County.			
Q1	How long have you lived in Orange County?		
	1	Less than 1 year	1%
	2	1 to 2 years	3%
	3	3 to 4 years	3%
	4	5 to 9 years	9%
	5	10 to 14 years	10%
	6	15 years or longer	74%
	99	Prefer not to answer	1%
Q2	How would you rate the overall quality of life in Orange County? Would you say it is excellent, good, fair, poor or very poor?		
	1	Excellent	28%
	2	Good	51%
	3	Fair	17%
	4	Poor	2%
	5	Very poor	1%
	98	Not sure	0%
	99	Prefer not to answer	0%

Q3	If you could change *one* thing to make Orange County a better place to live now and in the future, what change would you like to see? Verbatim responses recorded and later grouped into categories shown below. Categories mentioned by at least 2% of respondents presented.	
	Improve public transportation	15%
	Address homelessness	14%
	Provide affordable housing	11%
	Reduce traffic congestion	10%
	No changes needed / Everything is okay	9%
	Not sure / Cannot think of anything specific	9%
	Reduce cost of living	7%
	Limit growth, development	6%
	Improve public safety	6%
	Improve infrastructure, streets, roads	5%
	Address rent control issues	4%
	Reduce taxes, fees	4%
	Beautify cities, cleanliness, landscaping	2%
	Make cities more walkable	2%
	Provide more, safer bike lanes, sidewalks	2%
	Reduce, eliminate toll roads fees	2%
	Improve transportation system (general)	2%

Section 3: Perceptions of OCTA Programs and Services

Q4	How would you rate: _____ in Orange County? Would you say it is excellent, good, fair, poor, or very poor – or do you have no opinion?							
	Read A first, then randomize B-L	Excellent	Good	Fair	Poor	Very poor	Not sure	Prefer not to answer
A	The overall transportation system	6%	27%	31%	14%	8%	12%	3%
B	Bus service	7%	16%	19%	12%	8%	33%	5%
C	ACCESS Paratransit services for people with disabilities	6%	15%	10%	5%	5%	52%	7%
D	Rideshare and carpool matching programs	3%	14%	14%	7%	6%	49%	7%
E	Metrolink rail service	4%	19%	21%	13%	7%	31%	5%
F	Road and freeway planning	6%	29%	32%	14%	10%	7%	1%
G	The overall quality and condition of freeways	8%	38%	34%	12%	6%	1%	1%

H	Vanpool programs	2%	10%	10%	5%	5%	58%	10%
I	The overall quality and condition of city streets	7%	36%	34%	16%	6%	1%	0%
J	The overall quality and condition of the **91** Express Lanes	8%	25%	22%	10%	7%	24%	3%
K	The overall quality and condition of the **405** Express Lanes	11%	29%	19%	9%	6%	22%	4%
L	Bikeway planning	6%	24%	21%	14%	10%	21%	4%

Section 4: Transportation Priorities

Q5 There are a variety of improvements that could be made to Orange County's transportation system.

As I read the following list of improvements, please indicate whether you think it should be a high priority, a medium priority, or a low priority. If you think no money should be spent on this project, please say so. Please keep in mind that not all of the improvements can be high priorities.
Here is the (first/next) one: _____. Should this project be a high, medium or low priority?

	Randomize	High priority	Medium priority	Low priority	Shouldn' t spend money on project	Not sure	Prefer not to answer
A	Widen the freeways	34%	28%	19%	15%	3%	1%
B	Expand bus services	28%	29%	23%	9%	10%	1%
C	Expand the Metrolink rail service	34%	28%	20%	9%	7%	1%
D	Expand vanpool programs	10%	24%	30%	17%	18%	2%
E	Improve ACCESS paratransit service for people with disabilities	33%	29%	16%	5%	15%	1%
F	Improve the network of bike lanes	22%	31%	29%	12%	5%	0%
G	Construct roads over or under rail tracks where needed to improve traffic flow	29%	32%	25%	8%	6%	0%
H	Build additional toll lanes to help relieve traffic congestion	17%	17%	29%	34%	3%	1%
I	Coordinate traffic signals on major roadways to improve traffic flow	61%	27%	10%	1%	1%	0%
J	Fix potholes and repair roadways	68%	24%	7%	1%	1%	0%
K	Optimize the existing transportation system	44%	33%	13%	5%	6%	0%
L	Improve safety and security at transit stops and stations	41%	33%	16%	4%	6%	0%
M	Provide transit services to seniors and people with disabilities at a discounted rate	46%	33%	12%	4%	4%	1%
N	Provide free assistance and tow truck service to motorists who break down on freeways	27%	29%	23%	16%	4%	1%

O	Clean up polluted runoff from roads to reduce water pollution and protect local beaches	47%	29%	15%	5%	2%	0%
P	Close gaps, improve intersections, and reduce traffic congestion on major roads throughout the county	51%	33%	11%	3%	2%	0%
Q	Improve access to METROLINK stations using shuttles, light rail, and other transit services	32%	30%	23%	7%	7%	1%
R	Add local bus and shuttle services in communities that aren't well served by regional transit services.	35%	33%	18%	7%	6%	1%
S	Preserve and restore open space land to offset the impacts of freeway improvement projects	38%	30%	18%	9%	4%	0%
T	Modifying streets so they can safely accommodate all forms of transportation including cars, transit, pedestrians and bicyclists	33%	32%	20%	12%	3%	0%
U	Creating a network of light rail streetcars, similar to the San Diego trolley system	33%	21%	22%	17%	6%	0%
V	Making it easier for transit riders to get to their final destination by offering shuttles, e-bikes, e-scooters, and rideshare services at transit stations	29%	28%	23%	15%	5%	0%
W	Taking steps to protect the transportation system from flooding, mudslides, sink holes, and other extreme weather events	43%	31%	19%	4%	3%	1%

Q6	Is there a transportation project or improvement I ***didn't*** mention that you think should be a high priority for Orange County's future? *If yes, ask:* Please provide a brief description. Verbatim responses recorded and later grouped into categories shown below.	
	No other high priorities / Not sure	67%
	Eliminate, reduce cost of toll roads	3%
	Improve, provide more bus service	3%
	Expand freeways	3%
	Provide a high-speed rail	2%
	Synchronize traffic lights	2%
	Improve infrastructure	2%
	Add, expand network of safe bike lanes	2%
	Provide efficient, rapid transit system to reduce traffic	2%
	Expand, provide more Metrolink service	2%
	Provide, expand light rail	2%
	Provide more transportation connections, accessibility to different areas	2%

	Affordable fares, discounted, free transit services	2%
	Improve road safety	2%
	Provide monorail	1%
	Address homelessness	1%
	Extend, improve SR 241	1%
	Reduce traffic in general	1%
	Cleaner streets, roads	1%
	Enforce traffic laws, including E-bike riders	1%
	Provide, improve shuttle services and connections	1%
	Provide transportation to airport	1%
	Improve budgeting, management of funds	1%
	Complete projects more quickly	1%
	Limit construction, development	1%
	Improve parking	1%
	Improve drainage, coastal flooding	1%

Section 5: OCTA & Measure M			
Q7	Prior to taking this survey, had you heard of the Orange County Transportation Authority, also known as O.C.T.A (Oh-See-Tee-Ay)?		
	1	Yes	89%
	2	No	9%
	98	Not sure	2%
	99	Prefer not to answer	0%
Q8	To clarify, the Orange County Transportation Authority or O.C.T.A. (Oh-See-Tee-Ay) is a public agency responsible for planning, funding, managing and developing Orange County's transportation system, including freeways, streets and roads, bus and transit services, and the 91 and 405 Express Lanes. OCTA does NOT manage the 73, 133 (one-thirty-three), 241 (two-forty-one) or 261 (two-sixty-one) toll roads. In general, would you say you have a favorable or unfavorable opinion of the Orange County Transportation Authority – or do you have no opinion either way? *Get answer, if 'favorable' or 'unfavorable', ask:* Would that be very (favorable/unfavorable) or somewhat (favorable/unfavorable)?		
	1	Very favorable	17%
	2	Somewhat favorable	42%
	3	Somewhat unfavorable	12%
	4	Very unfavorable	8%
	98	Not sure	16%
	99	Prefer not to answer	5%

Q9	Next, I'm going to read a series of statements. For each that I read, please tell me whether you agree or disagree with the statement. If you don't have an opinion, just say so. Here is the (first/next) one: O.C.T.A . ____. Do you agree or disagree with this statement? *Get answer, then ask:* Would that be strongly (agree/disagree) or somewhat (agree/disagree)?						
	Randomize	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Not sure	Prefer not to answer
A	Makes good use of public funds	12%	30%	15%	12%	29%	2%
B	Is actively seeking solutions to our transportation issues	23%	38%	11%	8%	18%	2%
C	Is a public agency I trust	18%	38%	13%	9%	20%	2%
D	Listens to the general public	15%	29%	13%	11%	31%	1%
E	Has made many improvements to Orange County's transportation system in the past 5 years	21%	39%	15%	7%	17%	1%
F	Helps our local and regional economies function by improving our transportation system	22%	41%	11%	8%	16%	1%

Q10	Prior to taking this survey, had you heard of **Measure M**, also known as **OC Go** (Oh-See-Go) - Orange County's voter-approved half cent transportation sales tax?		
	1	Yes	33%
	2	No	59%
	98	Not sure	7%
	99	Prefer not to answer	1%

Section 6: Travel Behavior

Next, I'd like to know about the types of transportation you use when traveling in Orange County.

Q11	What form of transportation do you use <u>most often</u> when traveling in Orange County? *If they say **drive, car**, etc. ask:* Do you most often drive by yourself or with other people in the vehicle? *If with other people, ask:* When you ride with other people, do you typically ride with **one** other person, or with **at least two** other people? *If they say bus, ask:* Do you most often ride the local bus or BRAVO! rapid bus service?		
	1	Drive alone (auto/truck/van/SUV)	61%
	2	Carpool/drive with **ONE other person**	18%
	3	Carpool/drive with **TWO or more other people**	8%
	4	Vanpool	0%
	5	Bus (**local**)	4%

	6	BRAVO! (Bus Rapid Transit)	0%
	7	Metrolink rail	1%
	8	Motorcycle/Moped/Motorized Scooter	1%
	9	Bike	1%
	10	Walk/Run	2%
	11	Other	3%
	98	Not sure	0%
	99	Prefer not to answer	1%

Q12 In the past 12 months, have you used: _____ when traveling in Orange County? *If no, record answer. If yes, ask:* Have you used the service at least once per week, 2 to 3 times per month, once per month, once every two or three months, or less frequently than once every three months?

	Read in Order	Once per week	2 to 3 times per month	Once per month	Once every 2 to 3 months	Less often than once every 3 months	No, haven't used in past 12 months	Not sure/ prefer not to answer
A	A regular bus	6%	2%	3%	1%	5%	80%	2%
B	BRAVO! Bus Rapid Transit	2%	1%	2%	1%	2%	90%	3%
C	METROLINK rail	2%	2%	2%	4%	14%	73%	3%
D	ACCESS paratransit service	1%	1%	1%	1%	1%	90%	4%
E	Community shuttles or trolleys	2%	1%	1%	4%	8%	81%	4%
F	The 91 Express Lanes	8%	9%	9%	12%	13%	45%	4%
G	The 405 Express Lanes	11%	9%	8%	8%	13%	48%	3%

Section 7: Background & Demographics

Thank you so much for your participation. I have just a few background questions for statistical purposes.

D1 Which of the following best describes your employment status? Would you say you are employed full-time, part-time, a student, a homemaker, retired, or are you in-between jobs right now? *If they work and go to school, ask them to choose the category that best describes them: worker or student.*

	1	Employed full-time	54%	*Ask D2*
	2	Employed part-time	7%	*Ask D2*
	3	Student	8%	*Skip to D4*
	4	Homemaker	2%	*Skip to D4*
	5	Retired	21%	*Skip to D4*
	6	In-between jobs/unemployed	3%	*Skip to D4*
	7	Disabled/unable to work	2%	*Skip to D4*
	99	Prefer not to answer	2%	*Skip to D4*

D2	Are you currently working from home, commuting to a workplace outside of your home, or a mixture of both?			
	1	Working from home	15%	*Ask D3*
	2	Commuting to a workplace outside home	55%	*Skip to D4*
	3	Mixture of both	29%	*Ask D3*
	99	Prefer not to answer	0%	*Skip to D4*
D3	How many days do you *primarily* work from home each week?			
	1	One	12%	
	2	Two	20%	
	3	Three	24%	
	4	Four	10%	
	5	Five or more	31%	
	99	Prefer not to answer	3%	
D4	What ethnic group do you consider yourself a part of or feel closest to? *Read list if respondent hesitates.*			
	1	Caucasian/White	48%	
	2	Latino/Hispanic	23%	
	3	African-American/Black	3%	
	4	Native American Indian or Alaskan Native	<1%	
	5	Asian -- Korean, Japanese, Chinese, Vietnamese, Filipino or other Asian	16%	
	6	Pacific Islander	<1%	
	7	Mixed Heritage	3%	
	8	Other	1%	
	99	Prefer not to answer	5%	

D5	I have just one more question for you for statistical reasons. I am going to read some income categories. Please stop me when I reach the category that best describes your total household income.		
	1	Less than $25,000	5%
	2	$25,000 to less than $50,000	10%
	3	$50,000 to less than $75,000	12%
	4	$75,000 to less than $100,000	14%
	5	$100,000 to less than $150,000	21%
	6	$150,000 to less than $200,000	13%
	7	$200,000 or more	18%
	98	Not sure	1%
	99	Prefer not to answer	7%
Those are all of the questions that I have for you! Thanks very much for participating.			

Post-Interview & Sample Items			
S1	Gender		
	1	Male	50%
	2	Female	48%
	3	Non-binary	1%
	4	Prefer not to answer	2%
S2	Party		
	1	Democrat	37%
	2	Republican	34%
	3	Other	8%
	4	DTS	21%
S3	Age on Voter File		
	1	18 to 29	19%
	2	30 to 39	14%
	3	40 to 49	15%
	4	50 to 64	26%
	5	65 or older	26%

S4	Registration Date		
	1	Since Nov 2018	23%
	2	Jun 2012 to before Nov 2018	19%
	3	Jun 2006 to before Jun 2012	10%
	4	Before June 2006	47%
S5	Household Party Type		
	1	Single Dem	18%
	2	Dual Dem	10%
	3	Single Rep	13%
	4	Dual Rep	12%
	5	Single Other	14%
	6	Dual Other	5%
	7	Dem & Rep	6%
	8	Dem & Other	11%
	9	Rep & Other	8%
	0	Mixed (Dem + Rep + Other)	3%
S6	Homeowner on Voter File		
	1	Yes	61%
	2	No	39%
S7	Likely to Vote by Mail		
	1	Yes	74%
	2	No	26%
S8	Likely November 2024 Voter		
	1	Yes	100%
	2	No	0%
S9	Vote Propensity		
	1	High	62%
	2	Medium / Low	38%

S10	Survey Language	
	English	91%
	Spanish	5%
	Vietnamese	4%
S11	Supervisorial District	
	One	21%
	Two	14%
	Three	24%
	Four	17%
	Five	24%