



Where Are We Going?¹

Transportation Beyond the Pandemic

Oregon Values and Beliefs Panel Survey
June 2020

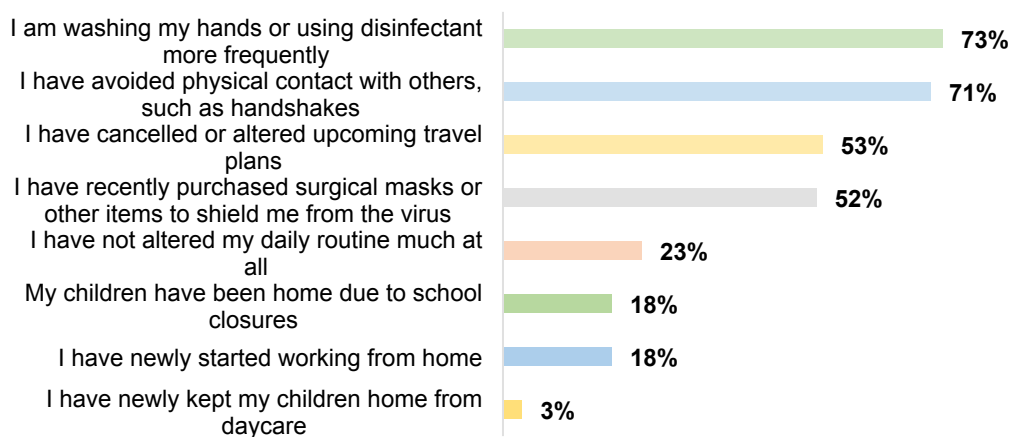
In response to COVID-19 and the shelter-in-place order, Oregonians' travel and transportation habits were forced to change. We are curious to know how Oregonians adapted their habits, what their current outlook is, and their expectations for the future.

These findings come from the fielding of the monthly DHM-OVBC Oregon Values and Beliefs Panel Survey. The online survey was conducted from May 29-June 7, 2020. It surveyed 900 Oregonians. To ensure a representative statewide sample, demographic quotas were set, and the data was weighted by area of the state, gender, age, and education. The survey's margin of error is $\pm 2.0\%$ to $\pm 3.3\%$ depending on how the response category percentages split for any given question.

How Has COVID-19 Affected Oregonians?

COVID-19 has changed how we live. Seventy-seven percent (77%) of Oregonians reported that the pandemic has changed their daily routines. All of the changes relate to limiting the exposure and transmission of COVID-19. Respondents are purchasing masks (52%), washing their hands more frequently (73%), and avoiding physical contact with others (71%). For some, the pandemic has meant working from home (18%) and having children stay at home (18%).

Chart 1
Changes to Daily Routines Due to Covid-19



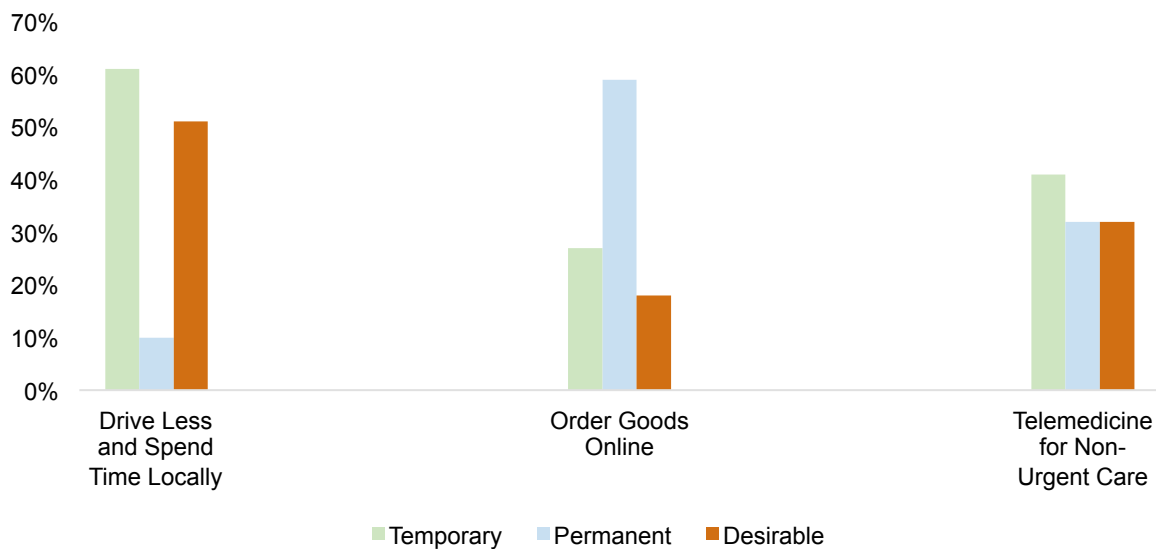
¹ The research was completed as a community service by DHM Research in partnership with the Oregon Values and Beliefs Center. Both organizations are independent and non-partisan. DHM is a Certified B Corporation and OVBC is an Oregon charitable nonprofit corporation.

Is This the New Normal?

COVID-19 has forced Oregonians to adapt. We wanted to measure which of these changes were felt by Oregonians to be desirable, and whether they felt the change would be temporary or permanent. Oregonians perceived driving less and spending more time locally as a very desirable change (51%) but did not expect it to be permanent (10%).

Ordering goods online was not seen as desirable change (18%), but most respondents believe it will be a permanent one (59%). Oregonians appear uncertain about telemedicine. Forty-one percent (41%) of respondents see the new reliance on telemedicine as temporary, while 32% expect it to be permanent.

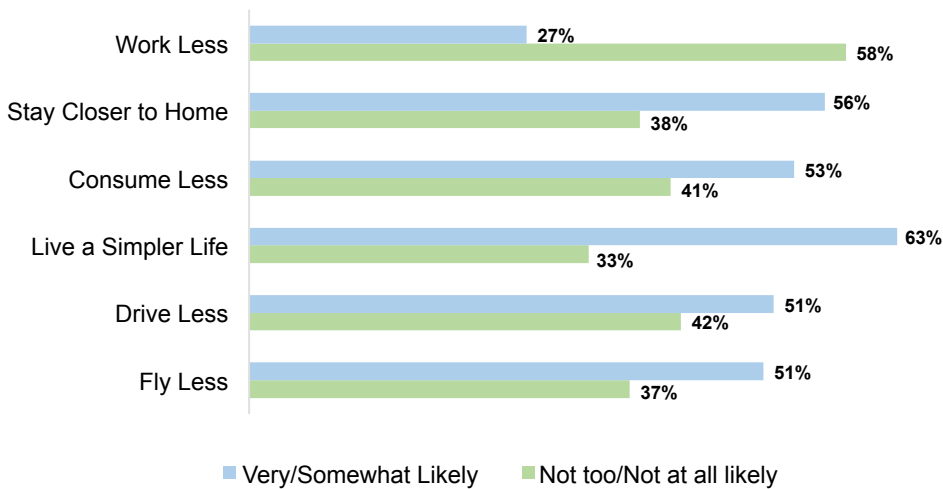
Chart 2
Expected Length and Desirability of Behavior Change



Will environmentally sustainable behavior stick?

We asked Oregonians how likely they would do be to behave in certain ways as the state came out of the coronavirus pandemic in order to reduce CO2 emissions. About 50% of respondents believe they are likely or somewhat likely to maintain the environmentally sustainable behaviors, with a high of 63% believing they are likely to live a simpler lifestyle and a low of 27% feeling they would work less.

Chart 3
How Likely to do Listed Activities Following COVID-19



If we exclude work less, an item perceived to be not likely of continuing for most Oregonians, we can identify trends by demographic. Across the three transportation related behaviors (stay closer to home, driving less, and flying less), the average affirmative response varies by gender, income, and political ideology.

Average Likely/Somewhat Likely Scores Across Transportation Behaviors by Demographic						
Women	Men	High-Income	Low-Income	Democrats	Republicans	NAV/Other
58.3%	47%	48.3%	59.3%	64.7%	35.3%	51.3%

Women (mean=58.3%) are more likely to commit to these behaviors than are men (mean=47%). Similar to gender, we again see that Republicans (mean=35.3%), compared to Democrats (mean=64.7%) and NAV/Other (mean=51.3%), perceive it less likely that they will continue the behaviors.

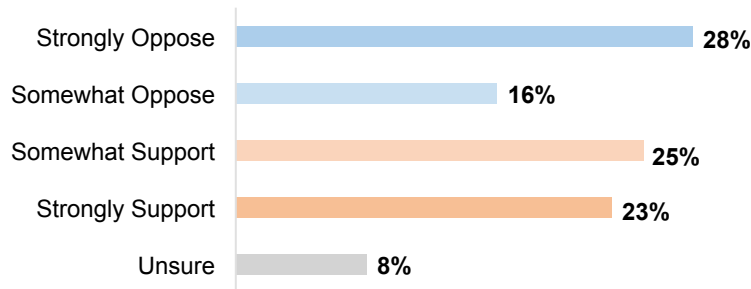
By comparing high-income Oregonians (over \$100,000 a year) and low-income Oregonians (under \$25,000 a year), we find that well-off respondents (mean=48.3%) report that they are less likely to continue to engage in sustainable behavior than those in the low-income group (mean=59.3%). Still, almost half of the wealthy respondents reported that they were likely or somewhat likely to maintain their new behaviors.

Transportation Measures

Currently, the revenue from the gas tax can only be spent on transportation projects related to roads. We asked Oregonians whether they would support or oppose an amendment to the Oregon Constitution that would allow gas tax revenue to be spent on transportation projects other than roads, such as public transit, walking, and biking.

Forty-eight percent (48%) of respondents supported amending the Oregon Constitution and 44% opposed. Eight percent (8%) remain unsure and would likely decide the matter. Redirecting the revenue from the gas tax is a controversial issue in Oregon.

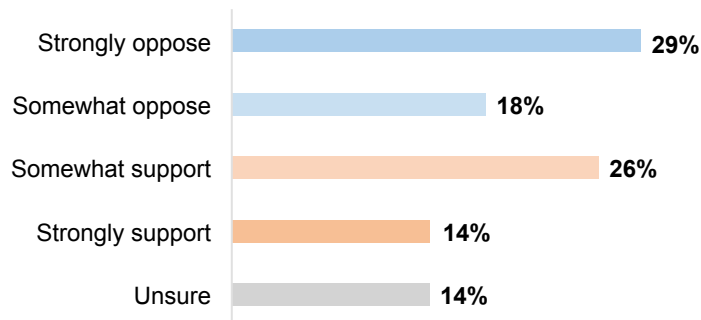
Chart 4
Support for Gas Tax Revenue Spent on Transportation



Revenue generated from the gas tax is also projected to decrease and is already not keeping up with the cost of repairing roads. Given this problem, we asked Oregonians if they would be willing to fund a mileage-based user fee program as an alternate way to fund transportation.

More Oregonians oppose a mileage-based user fee program (46%) than support it (40%). Again, an important portion of Oregonians remain unsure (14%). Opponents are stronger in their opposition (29% strongly oppose) than supporters in their support (14%). The uncertainty and overall narrow difference between those who oppose and those who support these measures suggests that a strong campaign on either side of the issue could make the difference.

Chart 5
Support for Mileage-Based User Fee Program

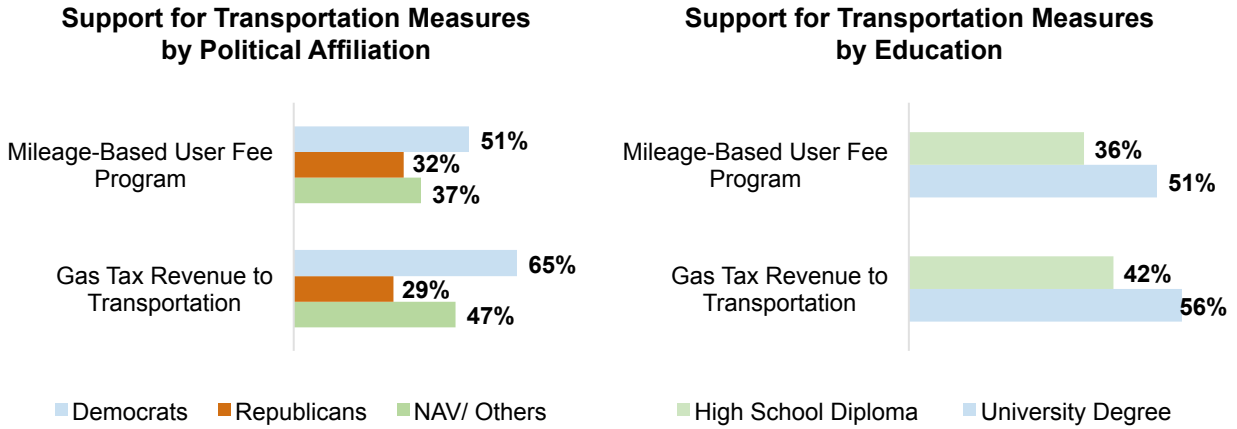


The results from both measures vary significantly based on political affiliation and education of the respondents. Respondents with a university degree supported both measures, 51% support for the mileage-based user fee program and 56% support for amending the Oregon Constitution and allow greater flexibility to spend gas tax revenue. This is far more than the 36% and 42% support rates for respondents with a high school diploma.

Democrats tend to support both measures, but their support appears stronger for increasing the flexibility of gas tax revenue (65%). Republicans are strongly opposed to both measures. In both cases, NAV/Other falls in between Democrats and Republicans. NAV/Other appear to be more on the side of Republicans

and in opposition to the mileage-based user fee program and are squarely in between the two major parties on redirect gas tax revenue.

Chart 6



Summary

Oregonians have adapted many of their behaviors in response to COVID-19, including transportation ones. It is still unclear which of these new behaviors are here to stay and which will subside as we transition out of the pandemic. Oregonians are split on hypothetical measures to increase spending flexibility of revenue from the gas tax and the implementation of mileage-based user fee program. The future of these measures will likely come down to how NAV/Other vote and the effectiveness of the campaigns on both sides.

Oregon Values and Belief Panel Survey

June 2020

N=900, ±2.0% to ±3.3%

26. Have you changed your daily routine in any way specifically because of the coronavirus (COVID-19)? *Select all that apply.*

Response category	n=900
My children have been home due to school closures	18%
I have newly started working from home	18%
I have cancelled or altered upcoming travel plans	53%
I have newly kept my children home from daycare	3%
I have recently purchased surgical masks or other items to shield me from the virus	52%
I have avoided physical contact with others, such as handshakes	71%
I am washing my hands or using disinfectant more frequently	73%
I have not altered my daily routine much at all	23%
Don't know	2%

As a result of the coronavirus (COVID-19), which of the following changes will happen in Oregon over the next few years and will they be temporary or permanent changes, and become the new normal? **[Randomize]**

Response category	Will not happen	Will be-temporary	Will be permanent	Don't know
29. People will drive less and spend more time locally, close to where they live	18%	61%	10%	11%
33. People will order more consumer goods online, decreasing the number of brick and mortar retail stores	4%	27%	59%	10%
34. Telemedicine will be the major form of non-urgent health care, replacing office visits to the doctor	11%	41%	32%	16%

Here is the list again of possible changes that may happen in Oregon because of the coronavirus (COVID-19). For each, indicate your opinion about the desirability of the potential change.

{Randomize}.

Response category	Desirable	Neutral	Undesirable	Don't know
37. People will drive less and spend more time locally close wo there they live	51%	30%	13%	5%
41. People will order more consumer goods online decreasing the number of brick and mortar retail stores	18%	42%	34%	6%
42. Telemedicine will be the major form of non-urgent health care replacing office visits to the doctor	31%	31%	32%	6%

How likely are you to do the following as we come out of the coronavirus pandemic in order to reduce CO2 emissions?

Response category	Very likely	Somewhat likely	Not too likely	Not likely at all	Don't know
44. Fly less	31%	19%	21%	16%	12%
45. Drive less	24%	27%	22%	20%	7%
48. Stay at home or closer to home for vacations	23%	33%	20%	18%	6%
49. Work less	12%	15%	25%	33%	15%

TRANSPORTATION

Currently in Oregon, the state constitution requires all gas tax revenue to be dedicated to road and bridge projects.

68. Would you support or oppose an amendment to the Oregon Constitution that would allow gas tax revenue to be spent on transportation projects other than roads, such as public transit, walking, and biking?

Response Category	n=900
Strongly support	23%
Somewhat support	25%
Somewhat oppose	16%
Strongly oppose	28%
Don't know	8%

Because people are driving less, improving fuel efficiency, and the increasing number of electric and hybrid vehicles, gasoline consumption is projected to decrease. As a result, revenue generated by the gas tax is also projected to decrease and is already not keeping up with the cost of repairing roads.

69. Knowing that gas-tax revenues are projected to fall because cars are using less gas, do you support or oppose implementing a mileage-based user fee program in Oregon as an alternate way to fund transportation?

Response Category	n=900
Strongly support	14%
Somewhat support	26%
Somewhat oppose	18%
Strongly oppose	29%
Don't know	14%