

# TECHNICAL MEMORANDUM

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## 2017 VANCOUVER PANEL SUMMER SURVEY - DRAFT

DATE:	September 15 <sup>th</sup> , 2017
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## 1. Introduction

The City of Vancouver has set out to become the greenest city in the world with the Greenest City Action Plan and Transportation 2040. Both plans set out bold visions of how the City's transportation network plays a key role in shaping the future growth of the City. That vision is already taking shape, as the City trends towards its goals of more than 50% of trips made by active or transit modes, and reducing the average distance driven by residents by 20% (from 2007 levels). The City's commitment to work towards these targets is evident by its ongoing commitment to transit oriented development and building separated bike lanes. Additionally, in July 2016, the City launched Mobi, a bike-share program that provides another transportation alternative for residents and visitors.

To benchmark and monitor progress towards the City's targets, the City has embarked on an annual survey of residents since 2013. To maintain consistency with other travel surveys in the region, the City's surveys have been conducted each fall amongst a panel of Vancouver residents. In addition to this annual fall survey, the City engaged the panelist this summer to address the following topics:

- Ongoing commitment to the fall panel survey;
- Feedback on factors impacting active transportation choices; and
- Mobi bike share program.

This technical memo summarizes the findings of the 2017 summer survey. **Section 2** summarized the demographic distribution of the returning panel members, as well as the panellist's likelihood of participating in the upcoming fall survey. **Section 3** presents the results of active transportation questions. The result of the Mobi bike share related questions are summarized in **Section 4**.

The complete survey instrument is included in **Appendix A** for reference.

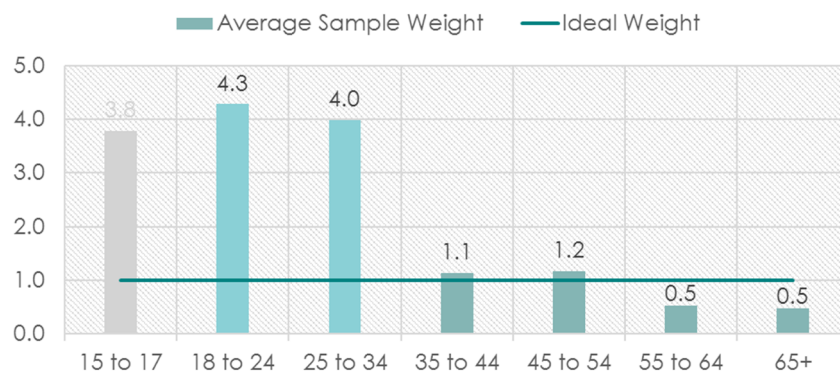


## 2. Demographic Distribution of Panelists

The Summer Survey was conducted from July 26<sup>th</sup> to August 13<sup>th</sup>, 2017. Invitations were sent to all 2,570 panel members that participated in the 2016 Fall Panel and following two email reminders, a total of 1,841 responded. Of these, 1,749 completed the summer survey and 1,724 indicated they will return for the fall survey.

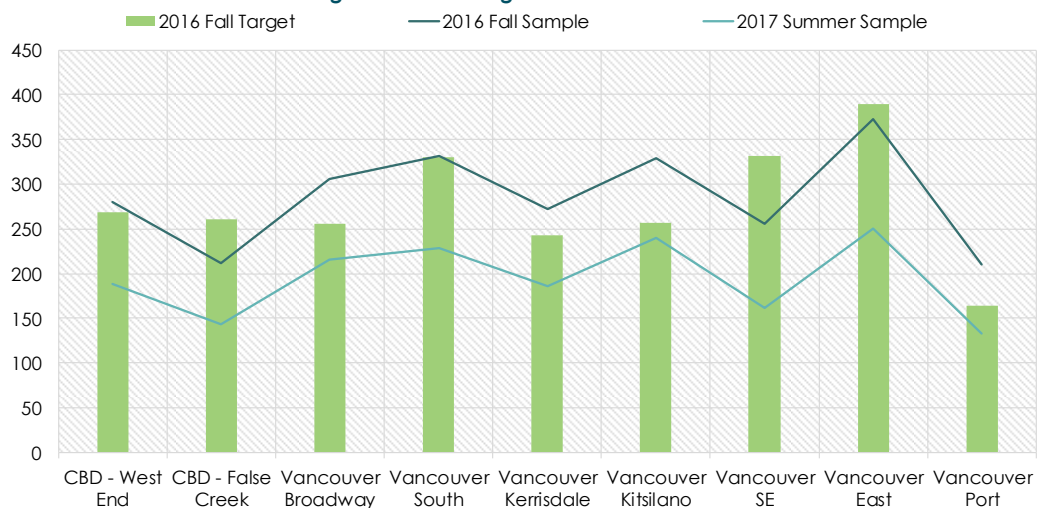
Of the respondents that completed the survey, 57% are female and 43% are male, consistent with ratios from the fall panelists. **Figure 1 Error! Reference source not found.** shows the average weight of summer panelists by age. Each panelist in the 18 to 34 age group represents at least four residents in the analysis, which shows young people's responses are more critical to results as they are under-represented in this survey. This challenge is a persistent issue for all market research surveys because young people are less likely to be linked to a property and a landline.

Figure 1: Weight by Age Range Groups



**Figure 2** analyzes the number of panelists by the nine sub-areas in the City. Similar attrition rates of about 30% can be seen throughout each area. Similar to past waves of fall and summer surveys conducted, False Creek, Vancouver South, Vancouver SE and Vancouver East continue to require greater recruitment effort in order to reach anticipated targets.

Figure 2: Sub-region Distribution



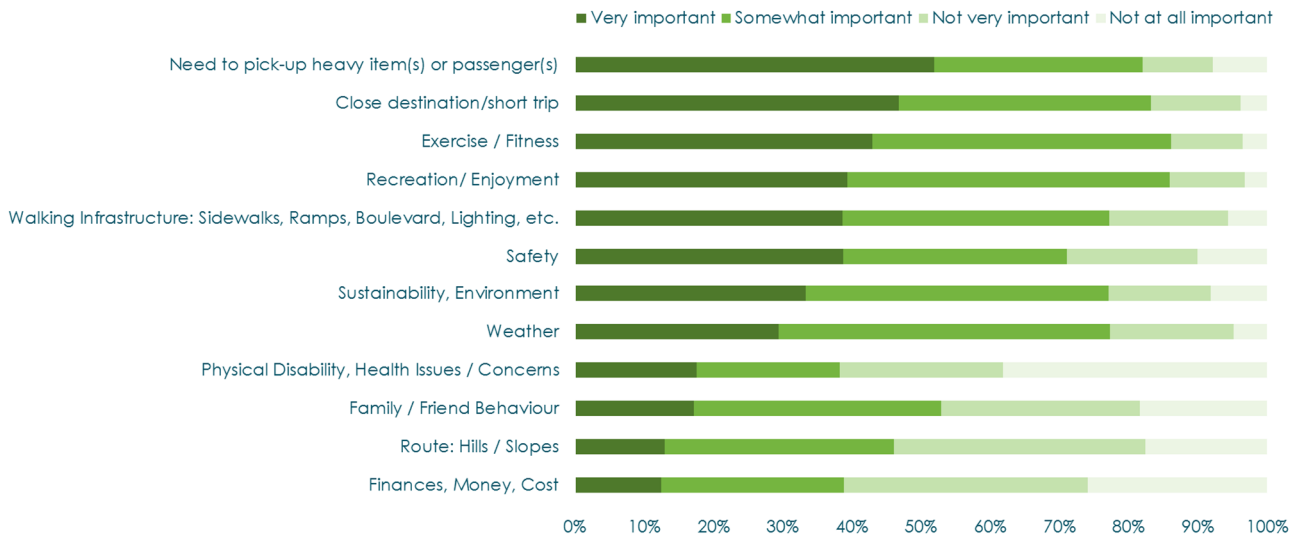


### 3. Active Transportation Questionnaire

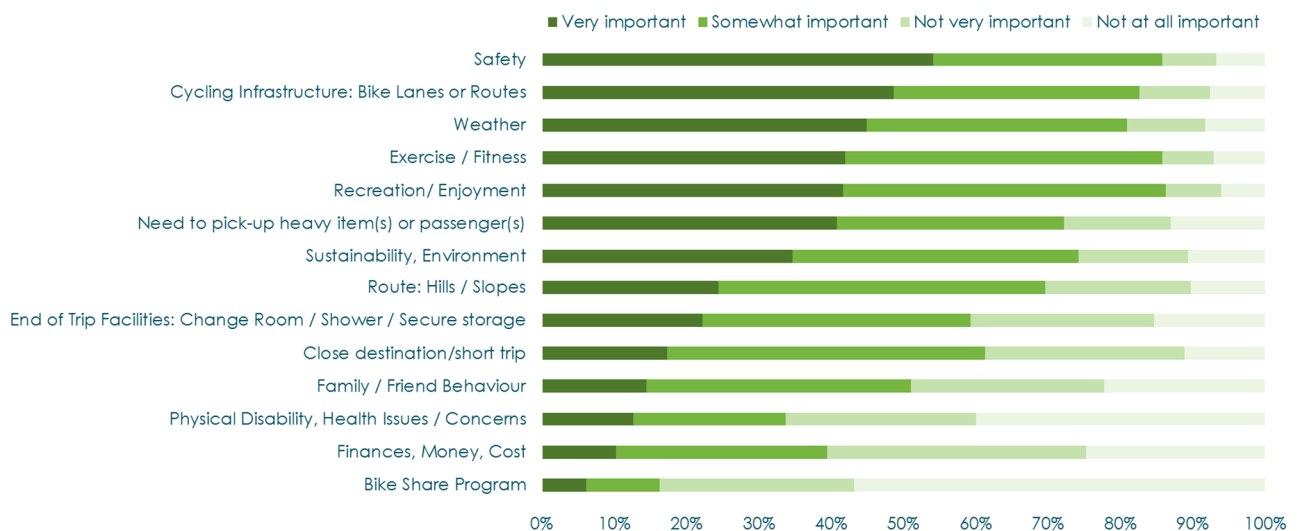
This section presents results from the active transportation questions. Unless specified, the results in this section are weighted by age, gender and sub-area of residence.

**Figure 3** and **Figure 4** list the importance of each factor in residents' decision of walking and cycling. Not requiring to carry heavy items and close proximity to their destination are most important factors to people who choose to walk. Safety is a top concern for cyclists, which could be correlated to better cycling infrastructure.

**Figure 3: How important is the factor in resident's choice of walking?**



**Figure 4: How important is the factor in resident's choice of cycling?**

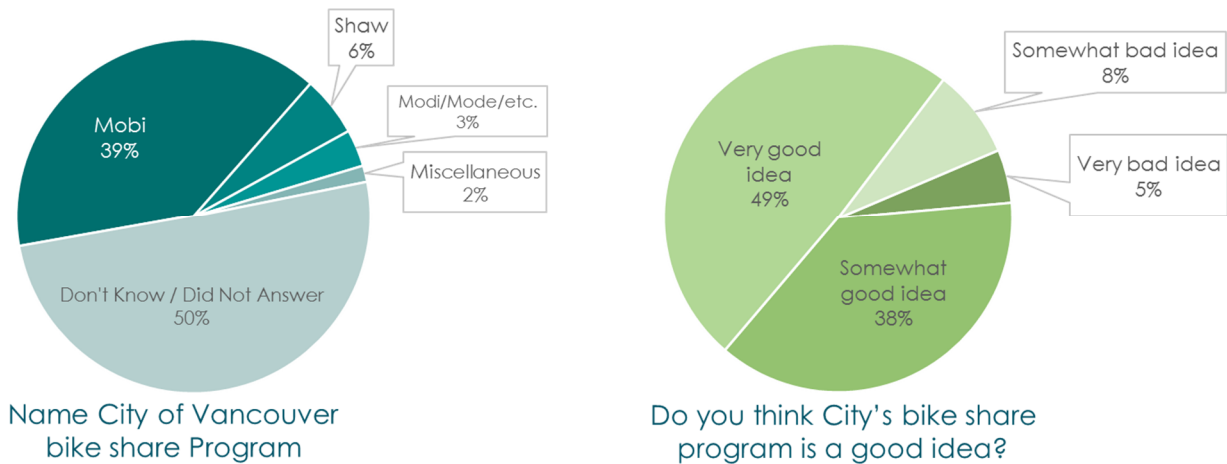




## 4. Mobi Bike Share Program

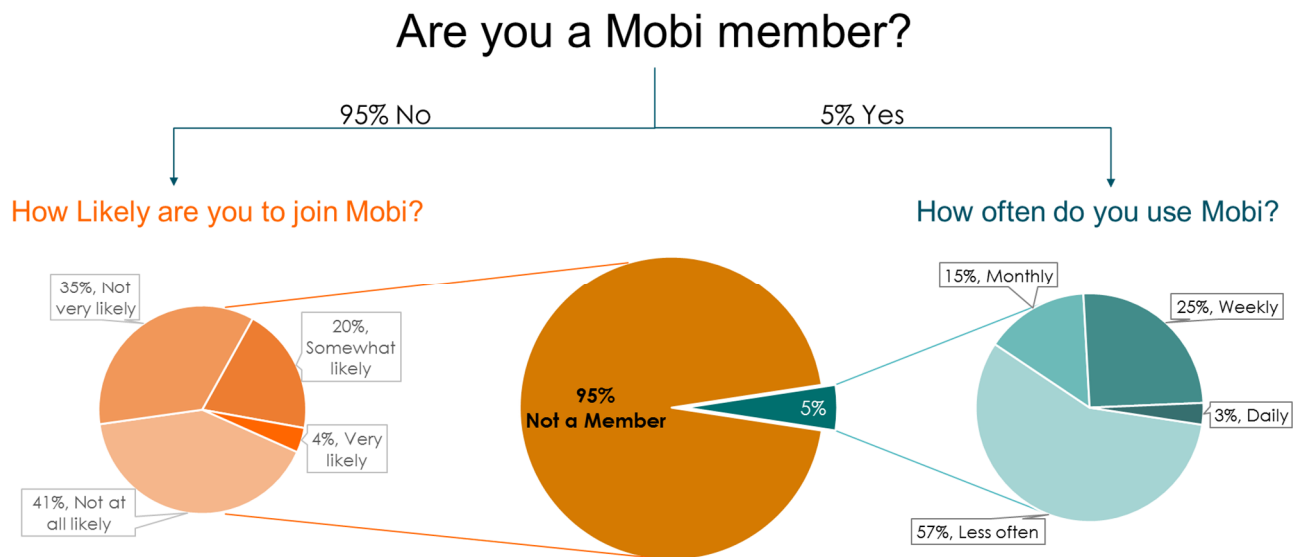
The City launched the Mobi bike share program in summer 2016. **Figure 5** presents public awareness and perception of the program. While only 39% of residents know the brand name of the public bike share program, the majority think this program is a good idea (87%). This shows nearly ubiquitous support for the bike share program, even though residents might not know it well or directly benefit from it.

Figure 5: Mobi Bike Share Program – Public Awareness and Perception



As presented in **Figure 6**, the survey shows only 5% of Vancouver residents are Mobi members. Additionally, only 28% of the Mobi members are frequent users (daily or weekly). Out of 95% of non-members, 24% of them are likely to join the bike share program if the bike share network is expanded closer to their travel destinations.

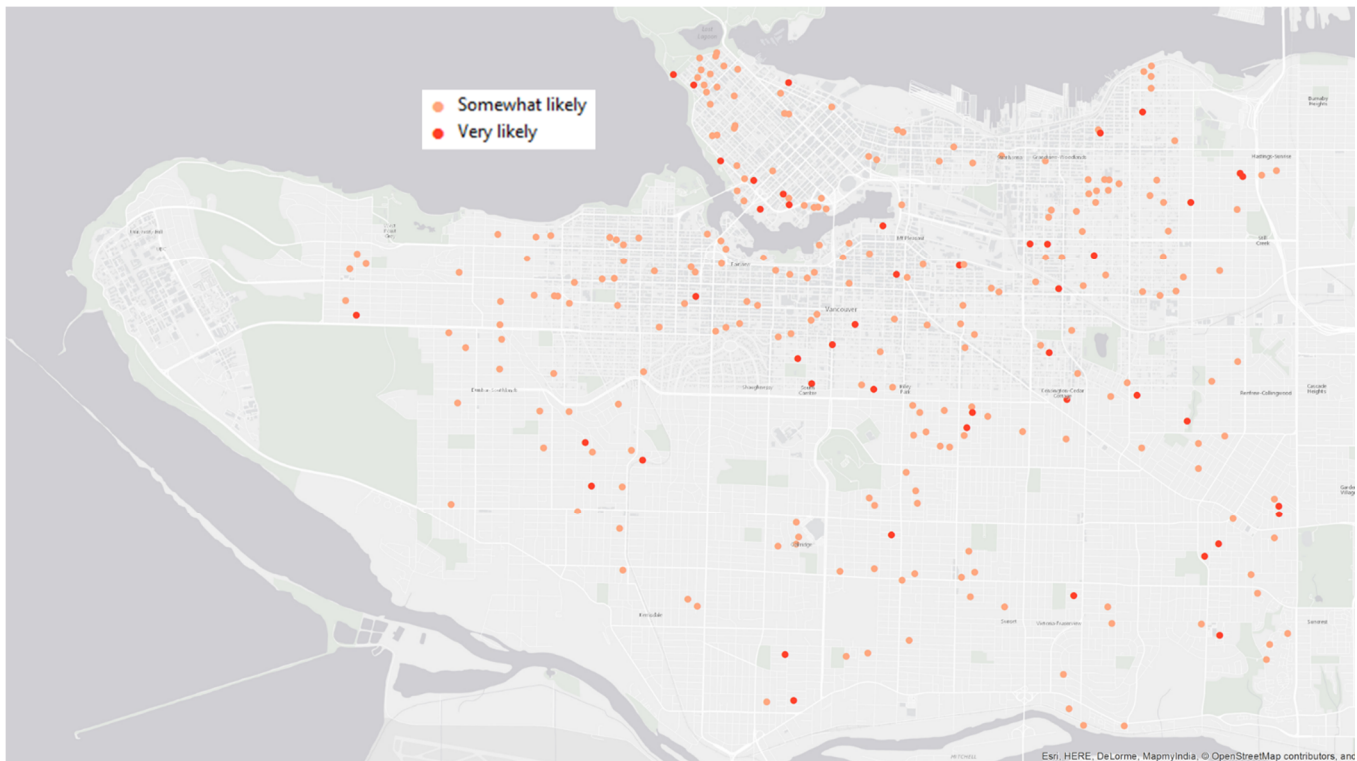
Figure 6: Mobi Bike Share Program – Membership Status





Residents likely to join the Mobi bike share program are marked geographically in **Figure 7**. It is interesting to note that people living within close proximity of the existing network are not members but would like to join. Residents in those regions may be targeted in marketing campaigns for the Mobi program. The next round of walk/bike questionnaires may include a question of trip origin designation for those residents, to assess the demand for bike share and evaluate effectiveness of expansion locations.

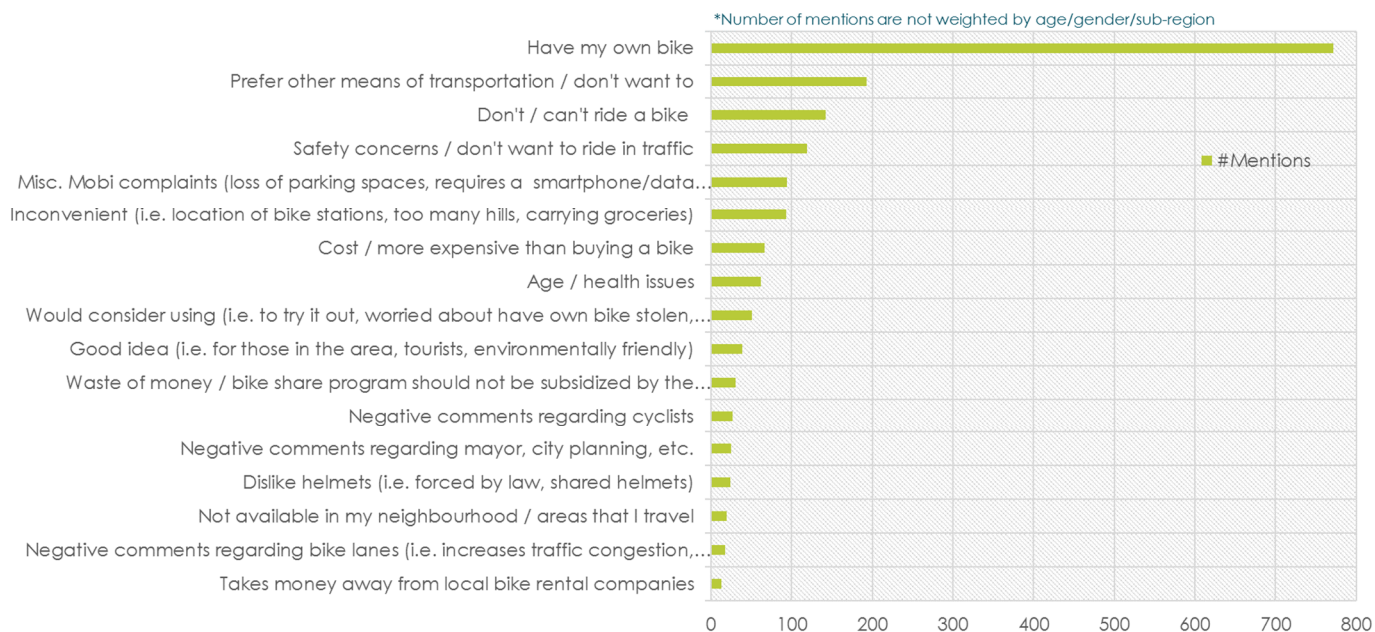
*Figure 7: Location Distribution for Resident likely to join Mobi*



**Figure 8** lists the reasons why residents are less likely to join the city's bike share program. The top reason, by a significant margin, for residents not likely to join Mobi is already having their own bikes. The bike share program is least mentioned, which means improving Mobi bike share is not likely to attract these people. In future panel surveys, it may be worthwhile to ask residents how many bicycles are owned within their household.



Figure 8: Why are residents [somewhat/not very/not at all likely] to use the city's bike share program





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## **Appendix A – 2017 Summer Survey Instruments**

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**COV Travel Survey 2017 - Summer Survey**  
**Study B782 FINAL: July 21<sup>st</sup>, 2017**



**SUMMER SURVEY EMAIL INVITATION**

**Subject: Confirmation of Participation in the City of Vancouver Annual Travel Survey**

**Sender: Mustel Group for City of Vancouver [covtravelsurvey@mustelgroup.ca]**

Hello City of Vancouver Travel Survey panelist!

In the past year, you completed a travel survey for the City of Vancouver and agreed to be a part of an ongoing panel to help the City better understand transportation needs and address transportation issues for area residents. Thank you again for providing your input to help your community.

The 2017 travel survey will run from mid-September to mid-December, giving you plenty of time to record your assigned trip day. As a thank you for your ongoing participation in the fall survey, this year you will have a chance to win one of 245 cash prizes ranging from \$50 to \$1,000!

In advance of that, we have a few questions that will help us plan for this year's survey and simplify your participation in the fall. Once you complete this short survey, you will also have access to a link with results from the 2016 survey. In appreciation of your time in completing this survey, you will have a chance to win one of ten cash prizes of \$100. Good Luck!

**Here is your link to a few simple questions:**

INSERT LINK

If your email program doesn't support *html* and you are unable to click on your unique link above, please copy and paste that link directly into your browser.

Thank you in advance for your continued participation!

Mustel Group Study Team (covtravelsurvey@mustelgroup.ca)  
402-1505 West 2<sup>nd</sup> Ave,  
Vancouver, BC V5T 1M5

Need Help?

Reply to this email or call us at: **778-383-3416**

To unsubscribe from receiving email reminders, please [click here](#)

To unsubscribe from this survey altogether, please [click here](#)



**COV Travel Survey 2017 - Summer Survey**  
**Study B782 FINAL: July 21<sup>st</sup>, 2017**



**MINI-SURVEY**

A1. Will you participate in this year's City of Vancouver Travel Survey?  
(You will only have to provide responses for one day between September and December.)

<sup>1</sup> Yes      <sup>2</sup> Not sure      <sup>3</sup> No

A1a. If No: Why is that?

A2. Please confirm or update the home address you provided last year. Doing so will make the process easier for you to enter trip information in the September survey.

SUITE#:

STREET#:

STREET NAME:

STREET TYPE:

STREET DIRECTION:

CITY:

PROVINCE:

POSTAL CODE:

<sup>1</sup> Yes, this is my home address

<sup>2</sup> No, I need to update my home address

**Active Transportation Questions:**

Q1 Are you physically able to walk?

<sup>1</sup> Yes      <sup>2</sup> No

**IF Q1=NO, SKIP TO Q3**

Q2 How important are the following factors in your choice to select walking as your transportation mode for a particular trip? **RANDOMISE ORDER**

<sup>4</sup> Very important

<sup>3</sup> Somewhat important

<sup>2</sup> Not very important

<sup>1</sup> Not at all important

<sup>9</sup> Don't know/not sure

- a) Close destination/short trip
- b) Need to pick-up heavy item(s) or passenger(s)
- c) Exercise / Fitness
- d) Recreation/ Enjoyment
- e) Family / Friend Behaviour
- f) Finances, Money, Cost
- g) Physical Disability, Health Issues / Concerns
- h) Route: Hills / Slopes
- i) Safety
- j) Sustainability, Environment
- k) Walking Infrastructure: Sidewalks, Ramps, Boulevard, Lighting Etc.
- l) Weather

**COV Travel Survey 2017 - Summer Survey**  
**Study B782 FINAL: July 21<sup>st</sup>, 2017**



Q3 Are you physically able to ride a bicycle?

- <sup>1</sup> Yes  
<sup>2</sup> No

**IF Q3=NO, SKIP TO Q5**

Q4 How important are the following factors in your choice to select cycling as your transportation mode for a particular trip? **RANDOMISE ORDER**

- <sup>4</sup> Very important  
<sup>3</sup> Somewhat important  
<sup>2</sup> Not very important  
<sup>1</sup> Not at all important  
<sup>9</sup> Don't know/not sure

- a) Close destination/short trip
- b) Need to pick-up heavy item(s) or passenger(s)
- c) Exercise / Fitness
- d) Recreation/ Enjoyment
- e) Family / Friend Behaviour
- f) Finances, Money, Cost
- g) Physical Disability, Health Issues / Concerns
- h) Route: Hills / Slopes
- i) Safety
- j) Sustainability, Environment
- k) Cycling Infrastructure: Bike Lanes or Routes
- l) Weather
- m) Bike Share Program
- n) End of Trip Facilities: Change Room / Shower / Secure storage

**Public Bike Share Questions:**

Q5 Please name the bike share program operated by the City of Vancouver.

- <sup>1</sup> Other Specify: \_\_\_\_\_  
<sup>2</sup> Don't Know

**PRESENT TO ALL**

*As you may know, public bike share systems are self-service bicycle rental programs that are available to the public for making short trips by bicycle. These systems exist in Montreal and Paris, and over 500 other cities worldwide. Vancouver's bike share program, MOBI, has 1,100 bicycles located at 122 stations throughout Downtown and the Central Broadway area, from Main Street to Burrard, and from the Waterfront to Broadway. Bikes can be rented and returned to any station.*

**SKIP TO Q8 IF Q1=UNABLE TO WALK – OR – Q3=UNABLE TO CYCLE**

Q6 Are you a member of MOBI?

- <sup>1</sup> Yes  
<sup>2</sup> No

**COV Travel Survey 2017 - Summer Survey**  
**Study B782 FINAL: July 21<sup>st</sup>, 2017**



**ASK IF Q6=1, MOBI MEMBER**

Q7 How often do you use MOBI?

- <sup>1</sup> Daily
- <sup>2</sup> Weekly
- <sup>3</sup> Monthly
- <sup>4</sup> Less Often

**ASK ALL**

Q8 Do you think that MOBI, the city's public bike share program is a good or bad idea for Vancouver?

- <sup>4</sup> Very good idea
- <sup>3</sup> Somewhat good idea
- <sup>2</sup> Somewhat bad idea
- <sup>1</sup> Very bad idea
- <sup>9</sup> Don't know/not sure

**ASK IF Q6=2, NOT A MOBI MEMBER**

**SKIP TO CLOSING IF Q3=UNABLE TO CYCLE**

Q9 How likely are you to use the city's bike share program, if station locations were accessible to you?

- <sup>4</sup> Very likely
- <sup>3</sup> Somewhat likely
- <sup>2</sup> Not very likely
- <sup>1</sup> Not at all likely
- <sup>9</sup> Don't know/not sure

Q10 **IF Q9=SOMEWHAT/NOT VERY/NOT AT ALL LIKELY:** Why are you (Likely/Unlikely) to use the city's public bike share program?

**CLOSING:**

Thank you for completing this survey. The draw to win one of ten \$100 cash prizes will be conducted sometime in August and all winners will be contacted at that time. Good Luck!

We also thank you for continuing to be a City of Vancouver Travel Survey Panelist and look forward to your continued participation this year. We will contact you in September so look out for the email invitation then.

In the meantime, below are links to results from the 2016 City of Vancouver Travel Panel Survey:

Full Report: (INSERT LINK)

One Page Report: (INSERT LINK)

Enjoy the rest of the summer!  
The COV Travel Survey Team