

Cycling Poll, 2016

Prepared by
MARU/VCR&C via the
Angus Reid Forum



Measuring Torontonians' interest in a Safer Cycling Network



This research was commissioned by Evergreen in partnership with Cycle Toronto, Toronto Centre for Active Transportation, and the Metcalf Foundation.

TORONTO SAN FRANCISCO NEW YORK LOS ANGELES
CHICAGO VANCOUVER LONDON

May 2016

maru/vcr&c

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Background

Objectively measure **interest** in a Toronto-wide cycling network among a **representative** cross section of Toronto.



Methodology

Target Audience

Torontonians, 18+/
Representative by age, gender and region according to Statistics Canada.
Data weighted to age, gender, and borough by 2011 census.

Sample Size

Total	n=1603
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East York	97
Etobicoke	172
North York	281
Scarborough	245
Toronto	703
York	105
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Field

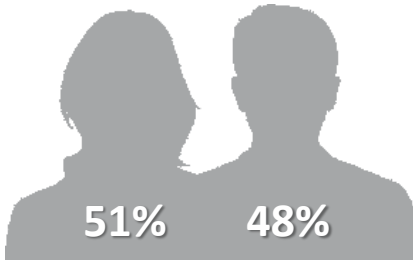
Fully blinded
Torontonians were surveyed between April 22nd and May 2nd, 2016
Survey fielded on the Angus Reid Forum.
The survey results are accurate within 2.4% 19 times out of 20.

Steps taken to ensure utmost data integrity:

- **Representative:**
 - The results are representative of age, gender, and population size by borough according to census. Sample was both balanced at invitation outgo, as well as weighted upon completion.
- **Blinded:**
 - The survey invitation was sent blinded. There was no mention of cycling or anything related in the subject line, invitation, or prior to introducing the subject matter.
- **Industry Leading Sample Quality:**
 - The Angus Reid Forum panel was used to field the study. It is known for in-depth profiling and rigorous quality control with minimal panel pollution and fatigue.
 - Angus Reid Forum uses a multi-pronged recruit strategy to gather a diverse and engaged cross-section of the population with a focus on quality rather than quantity. Angus Reid is a household name in Canada so many of our panelists (about 11%) simply come to us.
 - Our Panelists remain engaged both during and in-between surveys. We send monthly newsletters featuring recent poll highlights and news results as well as offering incentives to build interest and maintain participation.
 - We have a tighter definition of what constitutes an ‘active’ member than the industry standard. An ‘active’ member for our Voice of Market communities is defined as a someone that has participated in at least one survey or updated his/her profile, or registered to join the panel within the last 5 months (the proposed ISO standard suggests 12 months).
 - We have correctly predicted the results of 17 consecutive Canadian and US regional and national elections with a higher level of accuracy than all our competitors. Elections are one of the few occasions in which research findings are tested against real outcomes. The Canadian panel specifically was vetted by the Grand Mean test through MKTG. Inc and proven to be of the highest quality,
- **Execution:**
 - The research was conducted by MARU/VCR&C’s Public Affairs consulting division which is a global company headquartered in Toronto. MARU/VCR&C, formerly the Research & Consulting division of Vision Critical, is a professional services firm that helps its clients improve business outcomes by being more empathetic to their customers. We deliver our services through teams of sector-specific research consultants that have technology in their DNA, specializing in the use of Insight Community technology. Our research drives decision making across all aspects of customer experience, including innovation, product, branding, commercialization and communications.
 - The research was led by Lucas Melbye, Research Director, and Yasmin Omidvar, Sr. Research Manager.

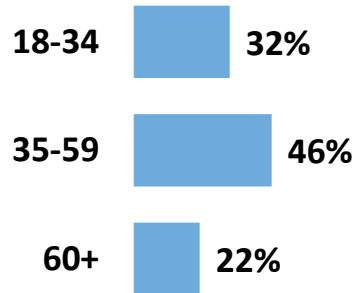
Sample Profiling*

Gender

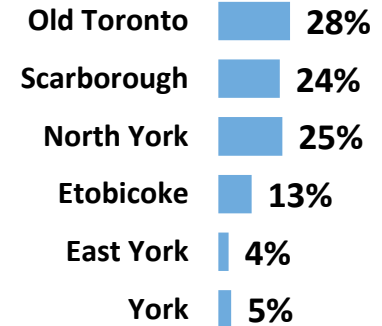


1%: Other

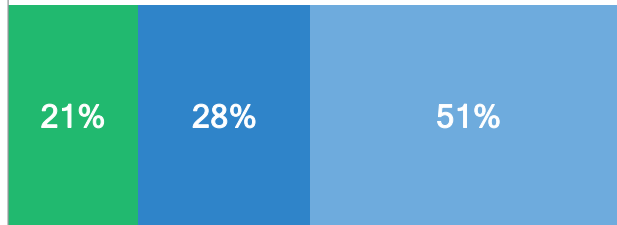
Age



Toronto



Cycling Habits



- Frequent**
(Weekly to Daily)
- Occasional**
(Bimonthly to Monthly)
- Potential**
(Never)

50% of Torontonians have ridden a bicycle at least once in the past year. These are defined as 'cyclists' for the sake of this report.

*Sample weighted to age, gender, and borough of Toronto. Outgo balanced. TRANSPORTATION_MODES. In good weather, how frequently do you use each of the following modes of transportation: Cycling? CYCLIST. Have you ridden a bicycle at least once in the last year?

Support for the “Safer Cycling Network”

What is the “Safer Cycling Network”?

Safer Cycling Network: An inter-connected series of bike lanes, cycle tracks, multi-use trails, and shared roadways in Toronto which would provide seamless access to different parts of the city. It is not limited to just the downtown core and would also include North York, Etobicoke, and Scarborough. This network was started in 2001 but is far from complete, especially outside of downtown. The goal of the City of Toronto’s new Cycling Network Plan is to fill in the gaps, add more routes, and enhance existing routes.



86%

of Torontonians are
“strongly” or “mostly”
in favour of the idea
of the safer cycling network

86%

Strongly/mostly in favour of the idea...

% In Favour

90%

Among Cyclists

81%

Among Non-Cyclists

“Even though I cannot ride a bicycle, I recognize the role they can play in reducing car traffic on our roads.”

-Respondent
York

86%

Strongly/mostly in favour of the idea...

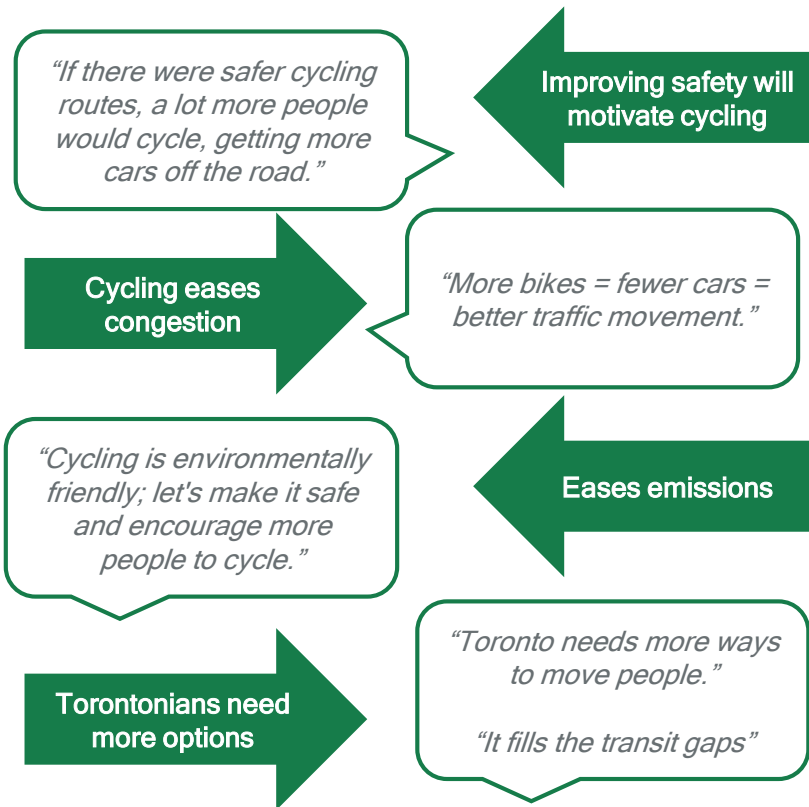
% In Favour

East York	84%
Etobicoke	79%
North York	84%
Scarborough	88%
Toronto	88%
York	85%

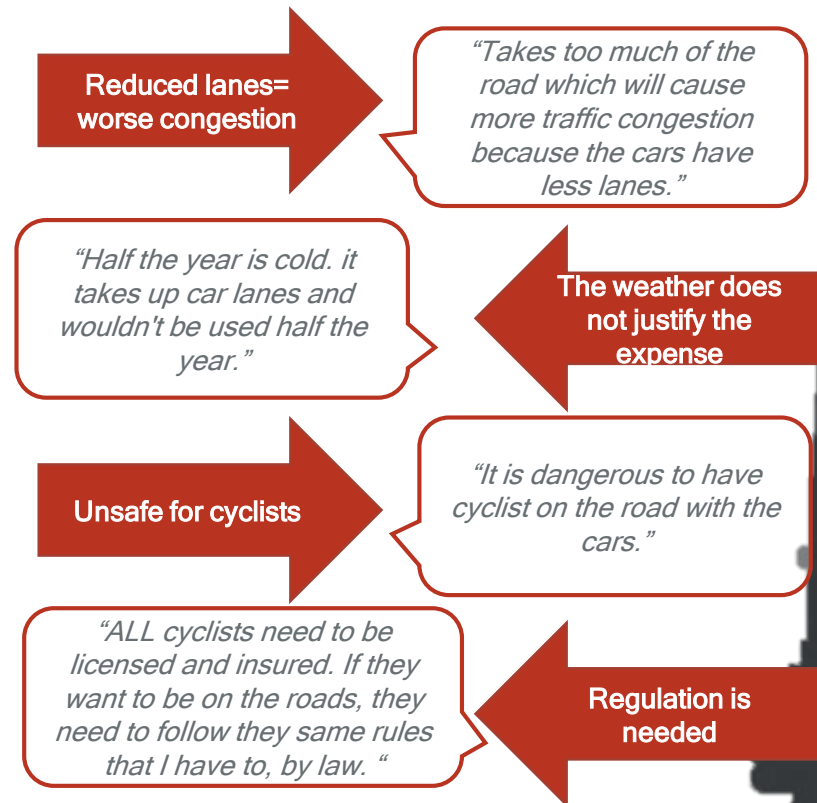
The reasons for support / opposition are multi-dimensional. Easing congestion is key for both.

Reasons for Supporting or Opposing

“Why I Support the Network”



“Why I Oppose the Network”

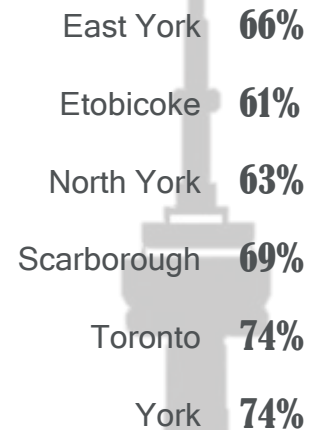


Needs Assessment

The need for infrastructure is urgent and felt by non-cyclists as well



*The City of Toronto needs to create better bike infrastructure **urgently***



Base: All Respondents - Total (n=1603); Cyclist (n=778), Non-Cyclist (n=825), East York (n=97), Etobicoke (n=172), North York (n=281), Scarborough (n=245), Toronto (n=703), York (n=105)

QCYCLE_ATTITUDES. Please indicate how much you agree or disagree with the following statements in the context of cycling in Toronto.

There is an immediacy underlying the demand



64%

(Strongly Agree/Agree)

*(A Safer Cycling Network...) is something I want to see built **immediately***

“ I see this as something that may move swiftly towards safe biking for the city. The delay in everything, all the time, I find frustrating, so tend to become disengaged.”

- Respondent
Old Toronto

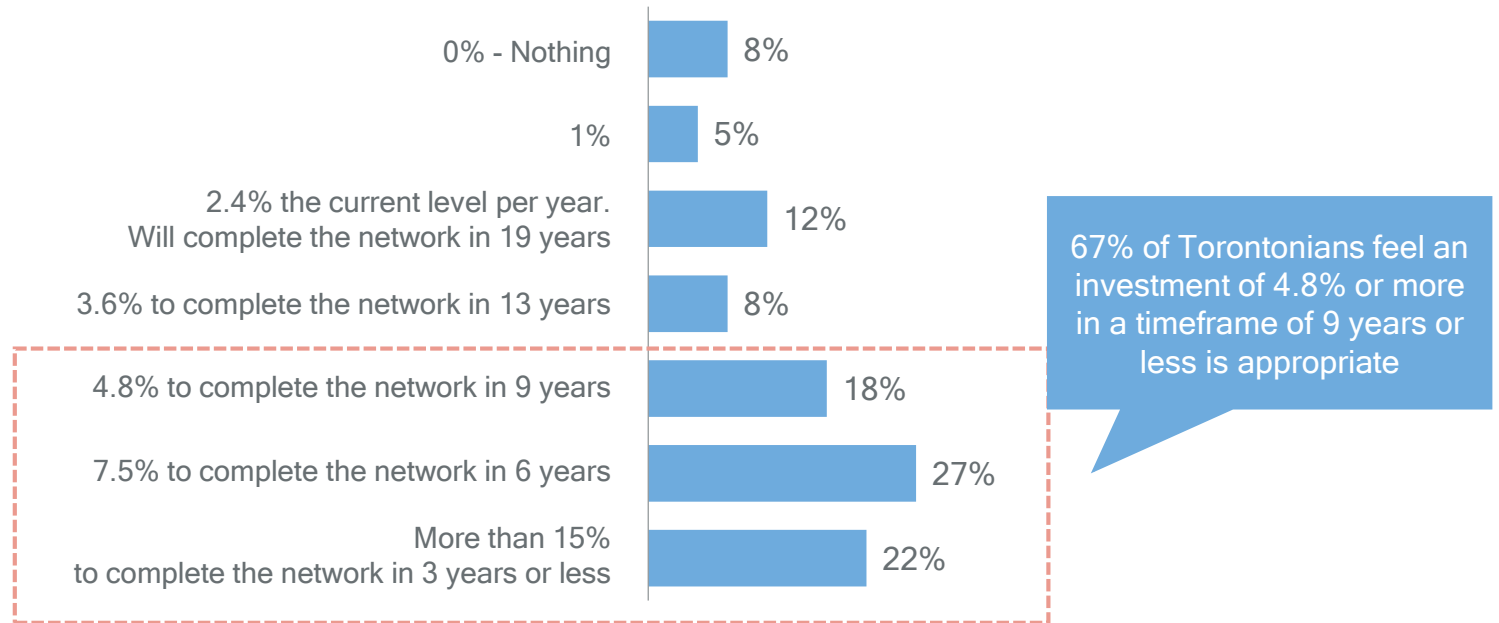
What level of funding is most appropriate? We asked...



The City of Toronto currently spends \$336 Million dollars per year on Transportation. Out of that budget, which do you feel is the most appropriate level of spending per year for the “Safer Cycling Network”?

The majority of Torontonians want increased investment in cycling

Most Appropriate Investment: Safer Cycling Network



Base: All Respondents (n=1603)

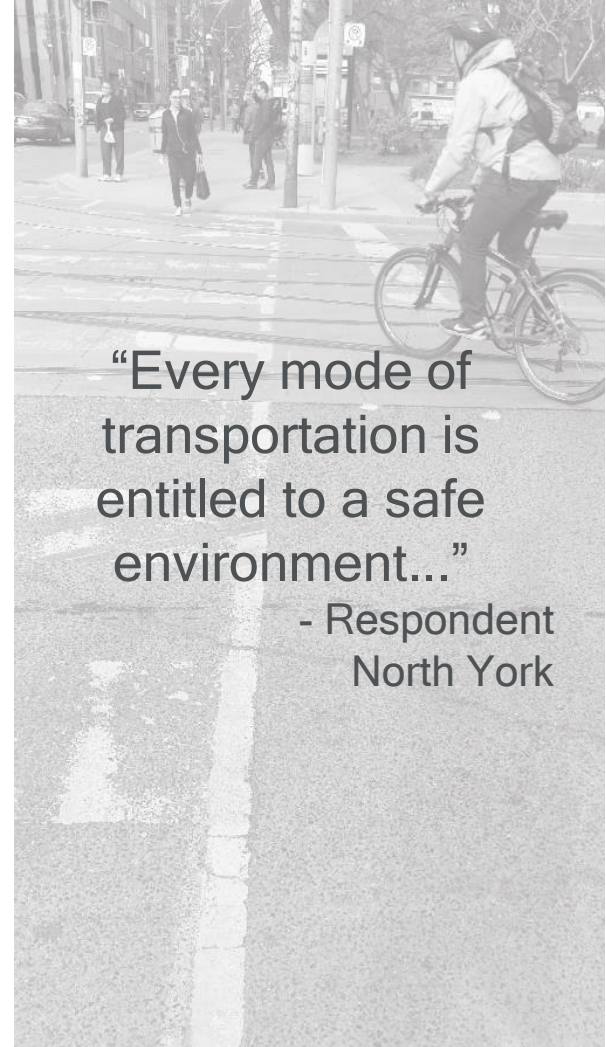
QINVESTMENT_LEVEL_NETWORK. The City of Toronto currently spends \$336 Million dollars per year on Transportation. Out of that budget, which do you feel is the most appropriate level of spending per year for the "Safer Cycling Network"?

Alleviating safety concerns

It is widely acknowledged that cyclists need better protection from vehicles

84% *(Strongly Agree/Agree)*

*Cyclists need **better protection** from motor vehicle traffic in Toronto*



“Every mode of transportation is entitled to a safe environment...”

- Respondent
North York

Torontonians perceive the Network as a way to reduce harm



79% *(Strongly Agree/Agree)*

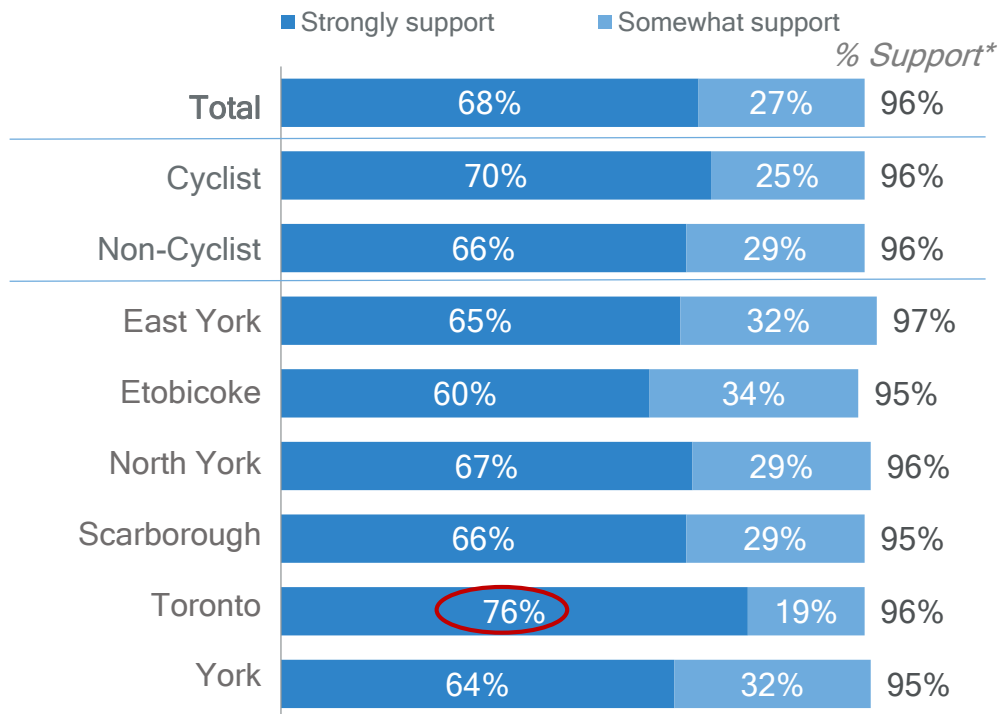
*That a Safer Cycling Network would **reduce fatalities** from car/bicycle collisions.*

76% *(Strongly Agree/Agree)*

That a Safer Cycling Network would make Toronto's roads safer for all

There is near unanimous support for the idea of Vision Zero

Support for Ending Traffic Fatalities



“ Cycling is a great environmentally friendly way of getting around town, but it's currently very unsafe in a lot of areas. There are always cyclists getting seriously injured or killed by vehicles. ”

-Respondent
East York

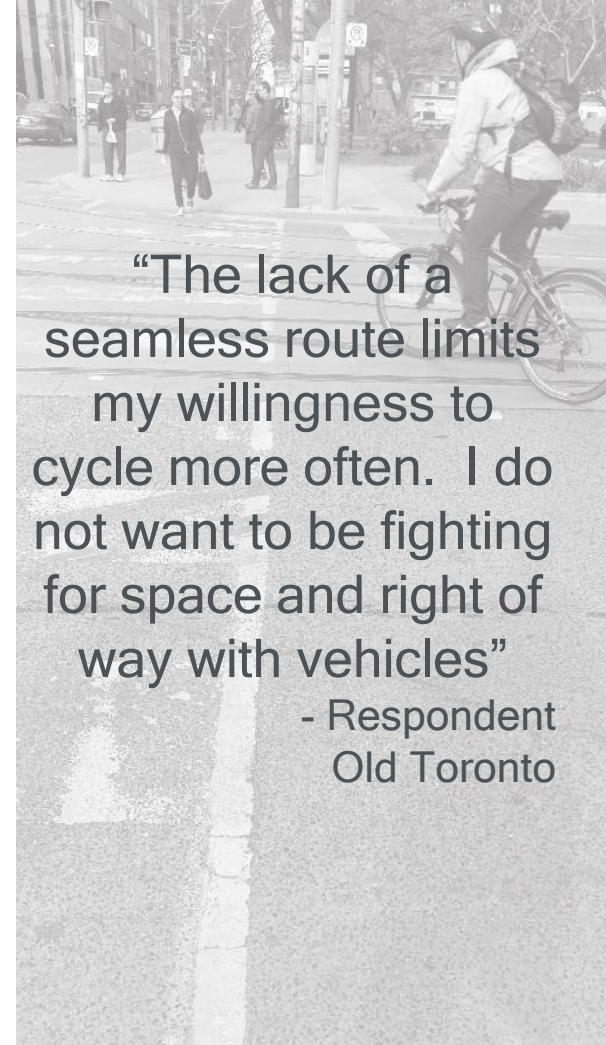
 Significantly higher

Reducing barriers to enable cycling

There is an opportunity to enable Torontonians to cycle more

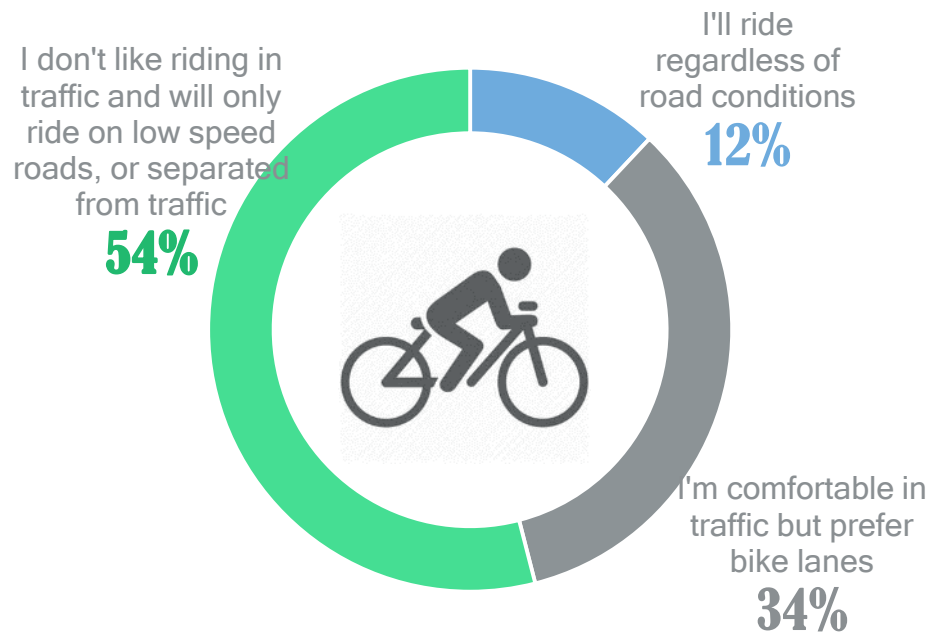
64% (Strongly Agree/Agree)

*I wish I could ride my bicycle **more often** than I currently do*



More than half of cyclists do not like riding in traffic and will only do so separated from traffic or on low speed roads

Riding Comfort Levels



“I personally don't ride on the streets because I don't feel safe.”

- Respondent
Old Toronto

Cycling as a means of transportation diversification

Getting Toronto moving is about leveraging all four modes of transportation, especially transit

How much do you agree or disagree that the following are ways to get Toronto moving?
% Strongly Agree/Agree



Cycling

78%



Walking

89%



Driving

65%



Transit

95%

Cycling is a means of diversifying transportation options for Torontonians

76% *(Strongly Agree/Agree)*

*That more bicycle lanes physically separated from motor-vehicles would make **traffic move better***

75% *(Strongly Agree/Agree)*

*That a Safer Cycling Network is an important way to get Toronto **moving faster***

61% *(Strongly Agree/Agree)*

*That a Safer Cycling Network would **alleviate crowding on the TTC***



Base: All Respondents - Total (n=1603)

QCYCLE_ATTITUDES. Please indicate how much you agree or disagree with the following statements in the context of cycling in Toronto. QSUPPORT_ATTITUDES. Please indicate how much you agree or disagree with the following statements. A "Safer Cycling Network" ...

Recap

Key Takeaways

- There is broad support for the idea of the “Safer Cycling Network”:
 - 86% in favour
 - Support for the Network is consistently high across boroughs (the lowest level of support being Etobicoke at 79%)
- Accelerated funding feels appropriate for a majority of Torontonians:
 - 67% of Torontonians feel an investment of 4.8% or more per year in a timeframe of 9 years or less is appropriate.
- The benefits are multi-dimensional:
 - Increased safety
 - Enabling Torontonians to cycle more
 - Diversification of transportation options



Thank you.

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Appendix

Most Torontonians use more than one mode of transportation to get around

Transportation Mode Used (in good weather)
Frequently = Almost weekly to daily



21%

frequently cycle



82%

frequently walk



68%

frequently drive



57%

frequently use transit