

Prepared by:

Innovative Research Group, Inc.

Toronto • Calgary • Vancouver

www.innovativeresearch.ca



GTHA Transit Survey

Problems, Solutions, and Public Attitudes



Final Report

Embargoed until **May 27, 2013**



Key Findings

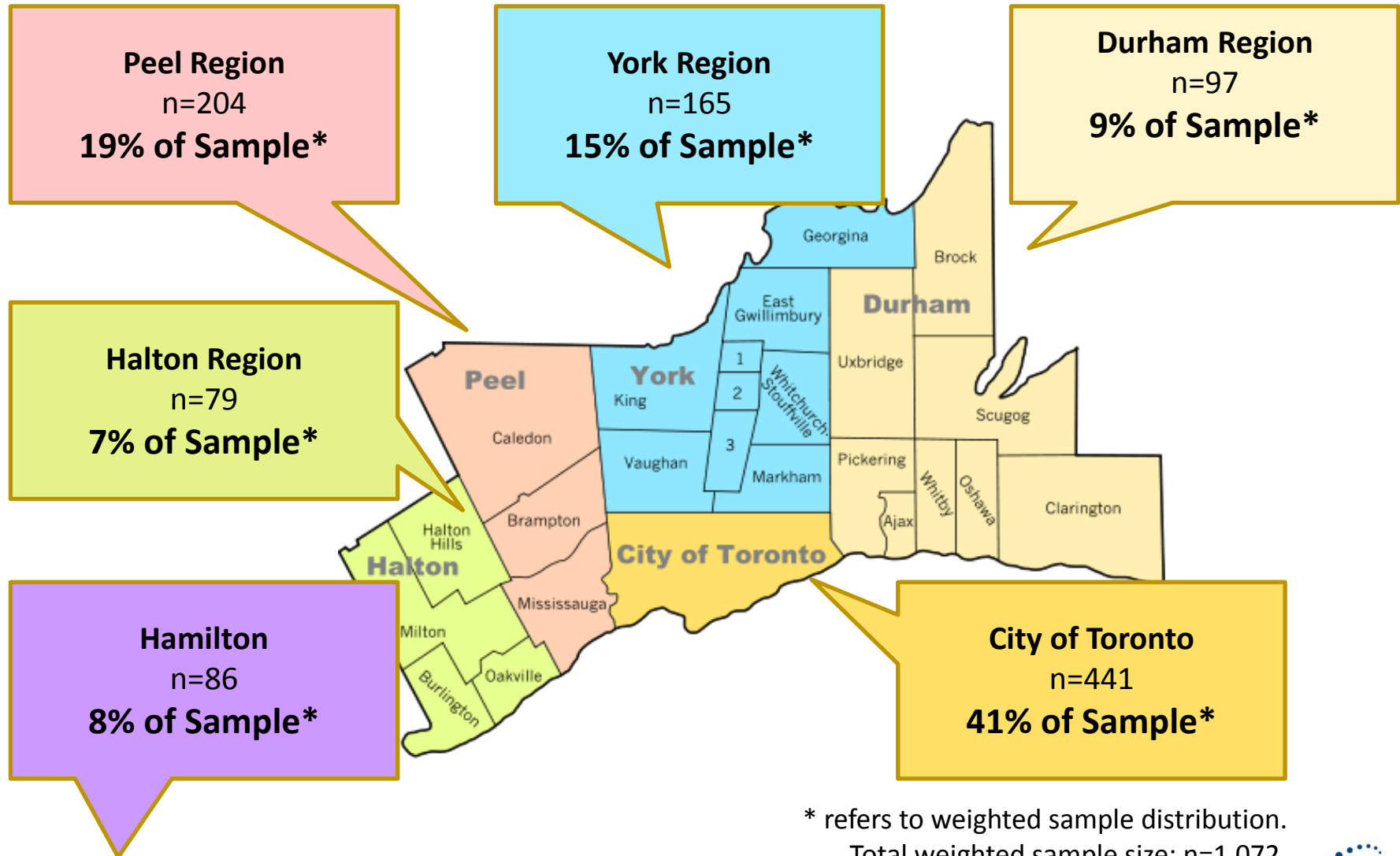
1. Traffic congestion and public transit are serious voter concerns in the GTHA.
2. In particular, public transit is the top concern among Toronto voters (unaided concern).
3. Although public transit is deemed “alright” by its regular users, it’s getting worse. Traffic congestion is currently bad and only getting worse.
4. Voters feel that municipal governments have not been handling this file well.
5. Furthermore, very few people outside of Toronto have heard anything about a plan to improve public transit. And even fewer have heard of any plans to reduce traffic congestion or improve highways and roads.
6. That said, voters believe the best way to combat traffic congestion in the GTHA is to invest in public transit improvements.
7. When presented with revenue tools to fund public transit improvements, opinions differ between Toronto and the Rest of the GTHA. In theory, **development fees**, **HOT lanes** and **park lot levies** have net support across the broader GTHA. In Toronto, there is positive net support for **toll highways** and a **fuel tax**. A **regional sales tax** and **property tax increases** are the least supported revenue tools across the GTHA.
8. Voters are open to P3s if that means improved services for transit and driving. However, the idea of tolling existing public highways is a none starter. Furthermore, voters appear to be more open to P3s where the private sector delivers public sector services, but where the government retains ownership.

Methodology

- These are the findings of an **Innovative Research Group** (INNOVATIVE) poll conducted in partnership with **Spacing Magazine** from **May 9th** to **May 15th, 2013**.
- This online survey of **n=1,117** Canadian adults residing in the Greater Toronto and Hamilton Area was conducted on INNOVATIVE's Canada 20/20 national panel.
- This survey was administered to a series of randomly selected samples from the panel and weighted down to **n=1,072** by age, gender and region to ensure that the overall sample's composition reflects that of the actual GTHA population according to 2011 Census data to provide results that are intended to approximate a probability sample.
- INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey and panel members can only complete a particular survey once.
- Since the online survey was not a random, probability based sample, a margin of error could not be calculated. The Marketing Research and Intelligence Association prohibits statements about margins of sampling error or population estimates with regard to most online panels.
- An unweighted probability sample of this size would have an estimated margin of error of **±2.9** percentage points, 19 times out of 20.

Note: *Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

Segmentation: Where did respondents come from?



* refers to weighted sample distribution.
Total weighted sample size: n=1,072.

Demographics: Respondent Profile

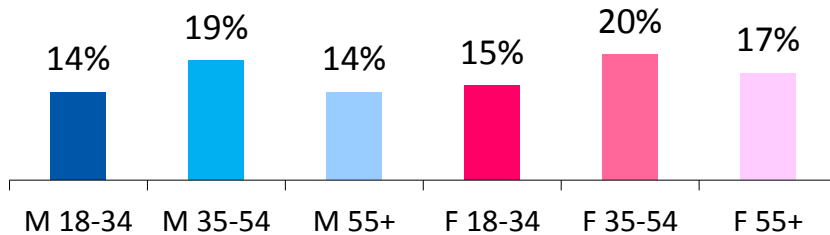
Age-Gender



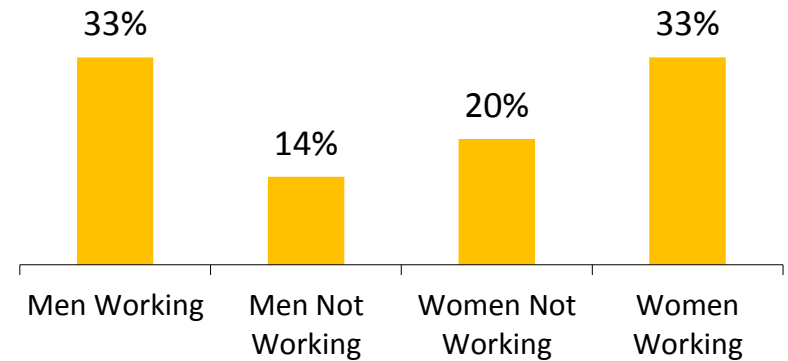
= 48%



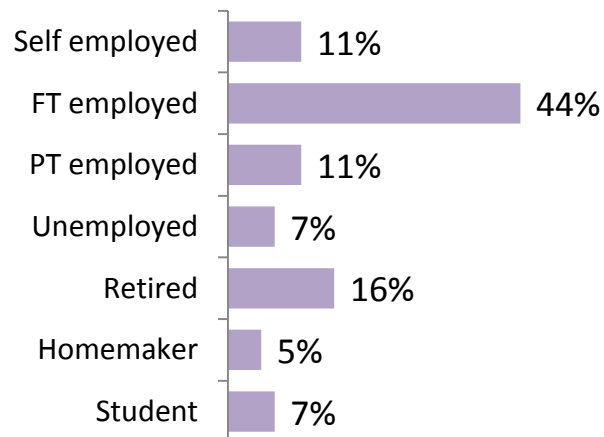
= 52%



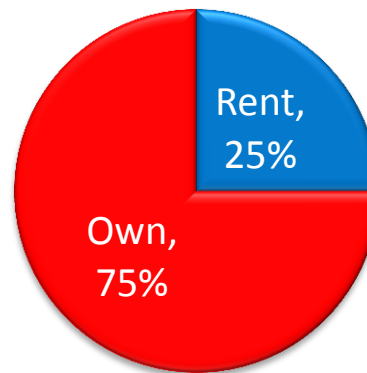
Gender-Work Status



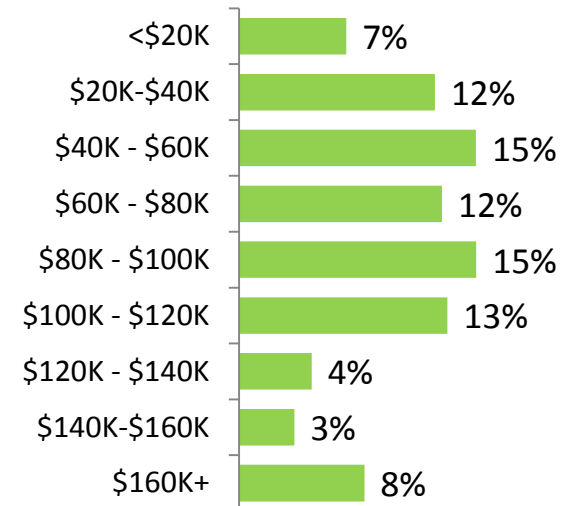
Employment Status



Home Ownership



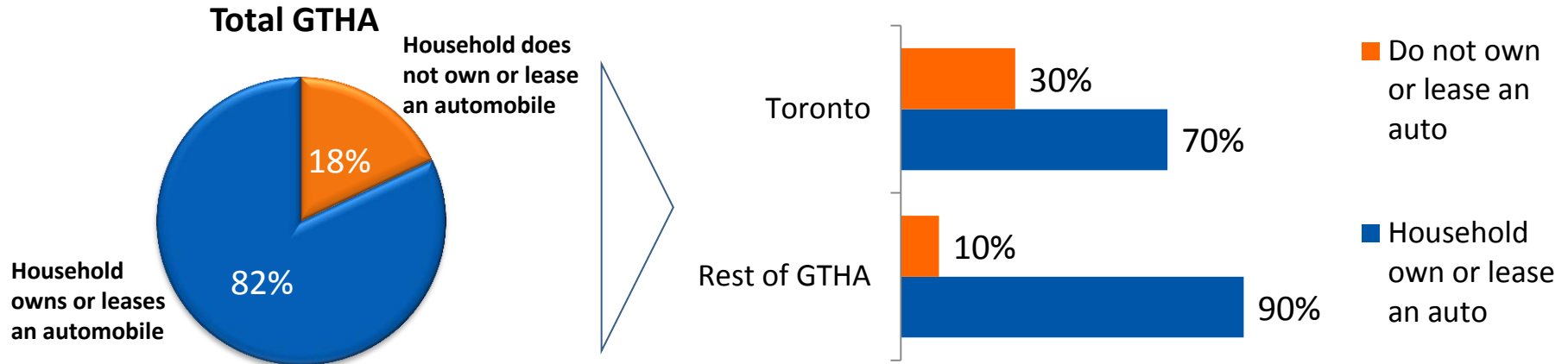
Household Income



11% prefer not to say.

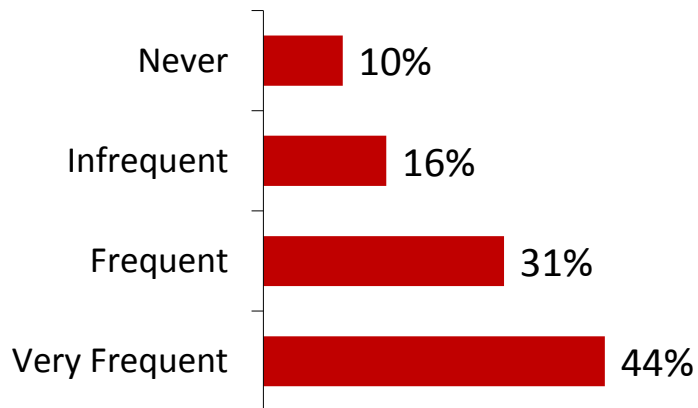
Demographics: Respondent Profile

Household Auto Ownership

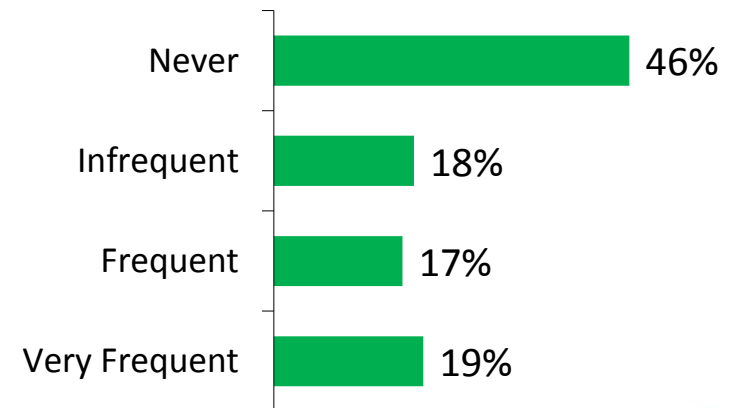


Q: Do you or does someone in your household own or lease an automobile that you have regular access to?

Driving Frequency*



Public Transit Usage



* In a typical week, how many days do you drive in an automobile (either as the driver or passenger) for each of the following reasons [commuting, for work, and personal/recreational purposes]?

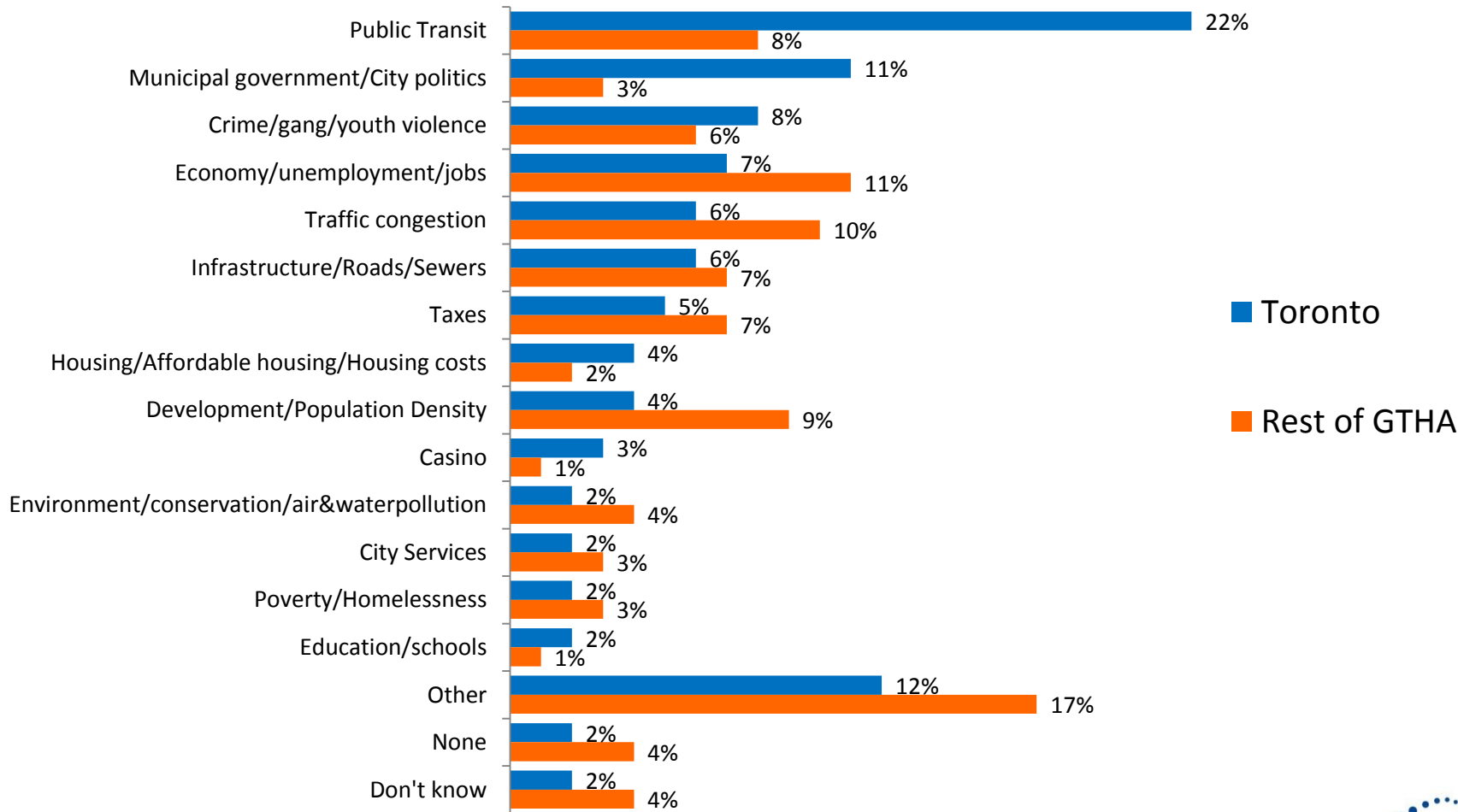
Assessing the Problem

Top Community Issues: Public transit the biggest municipal issue in Toronto; a lesser issue in the Rest of the GTHA



Thinking about municipal issues, what is the biggest problem in your community today? In other words, what is the one issue in your town or city that concerns you the most?

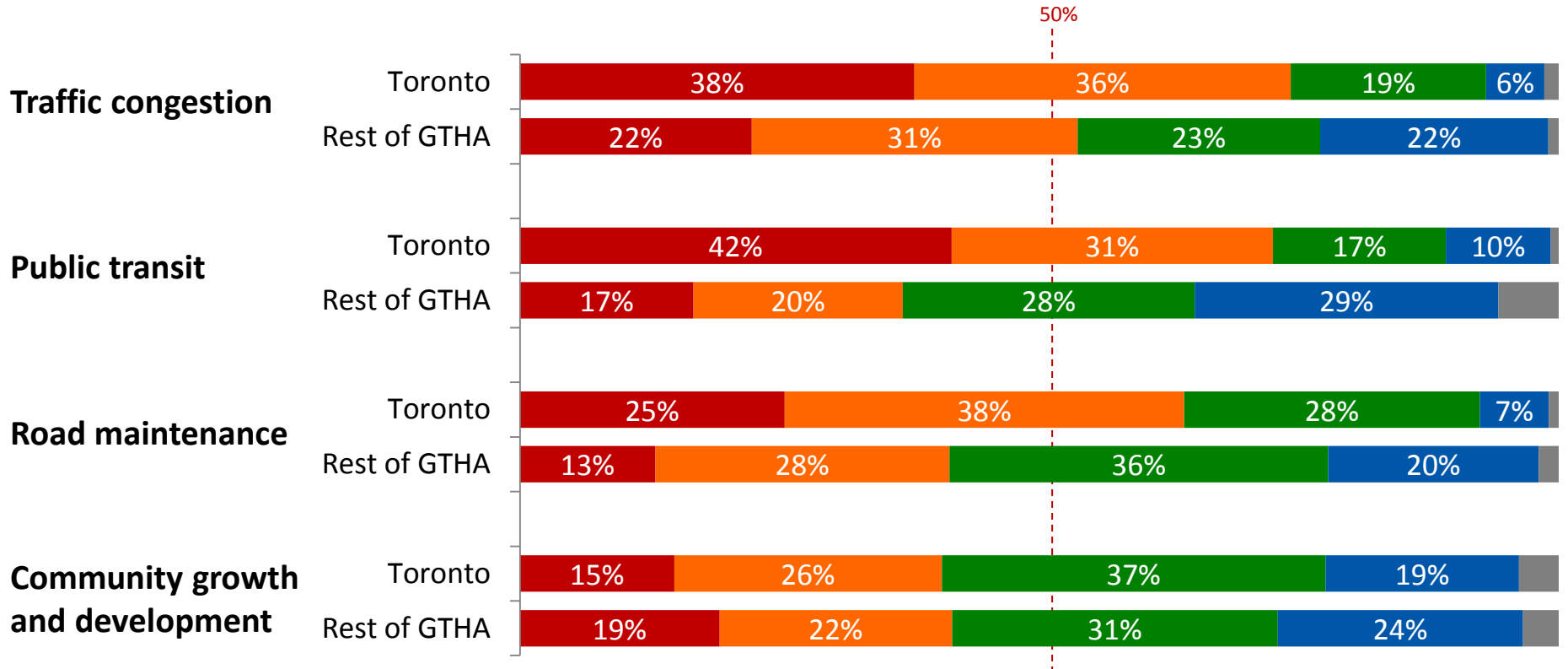
[asked of all 1072 respondents; open-ended]



Problem Significance: 4-in-10 (42%) in Toronto see public transit as critical problem that requires immediate action



For each of the municipal issues, please indicate how significant a problem you think it is in your community:
[asked of all respondents; n=1,072]



- A critical problem that requires immediate action
- A significant problem that needs to be dealt with soon
- Just one of many problems government should address
- Not really a problem
- Don't know

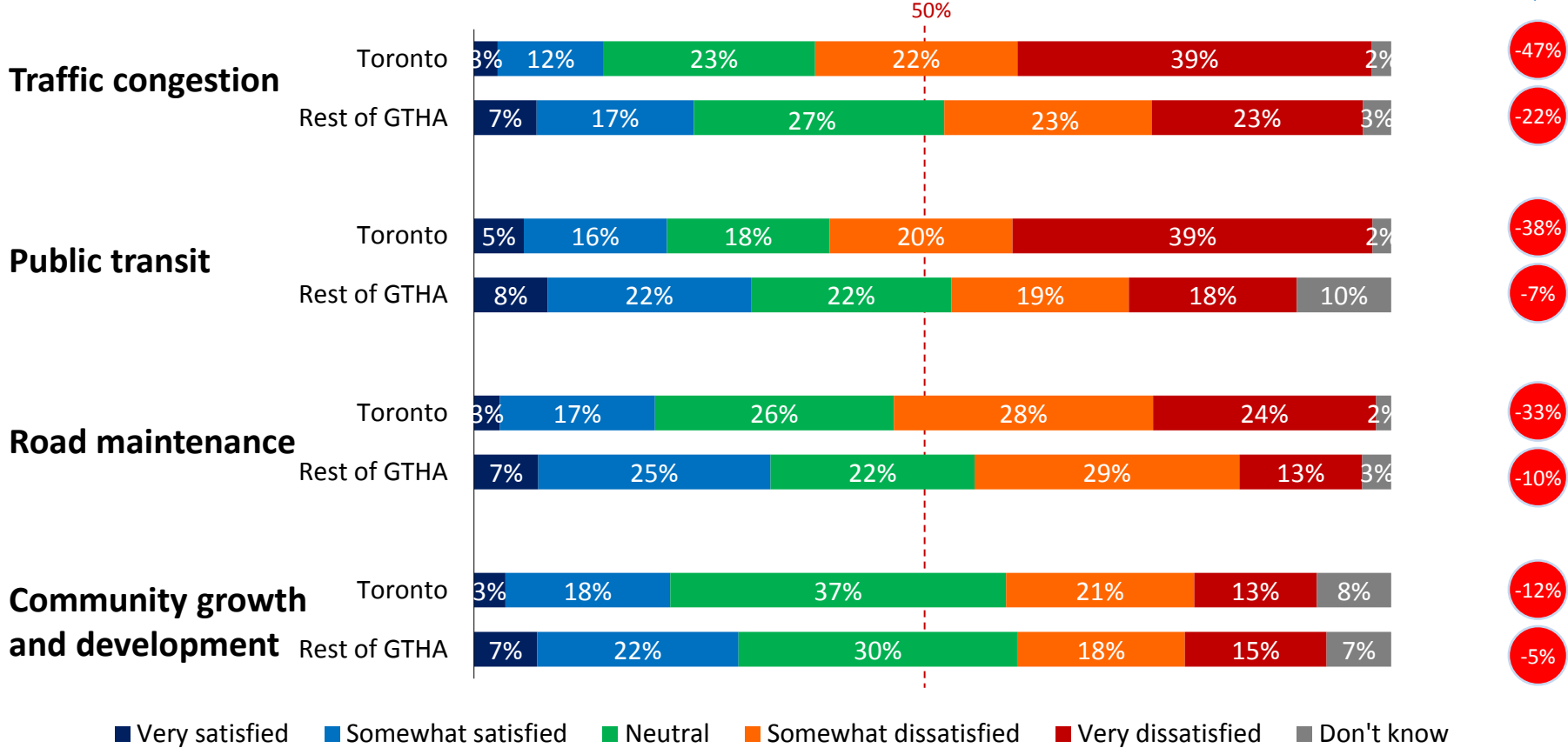
Issue Satisfaction: a majority (59%) of Torontonians are dissatisfied with the job City Council is doing on public transit



For each of the local issues, please tell me whether you are satisfied or dissatisfied with the job your municipal government is doing?

[asked of all respondents; n=1,072]

Net Satisfaction
(total satisfied – total dissatisfied)

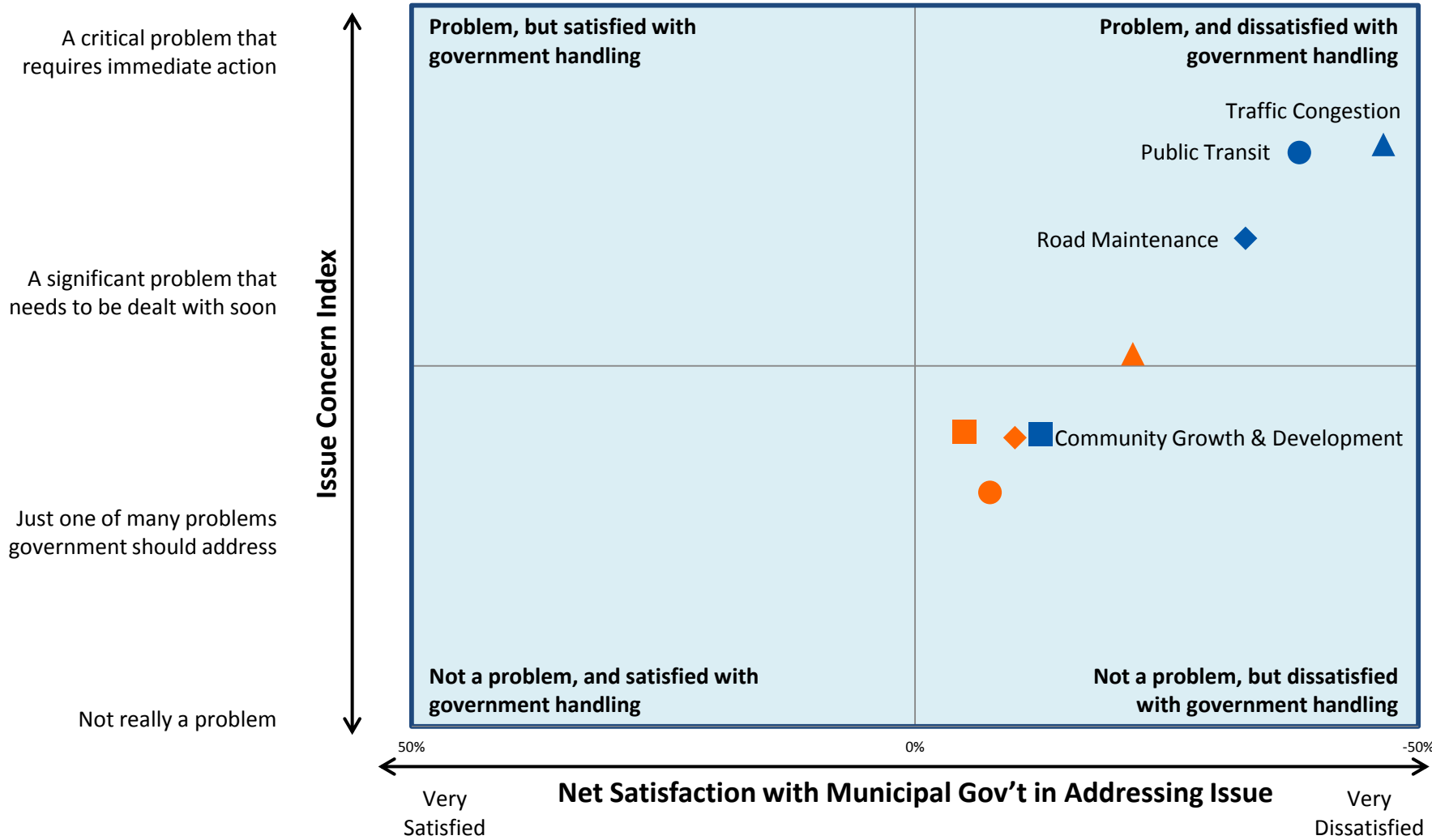


Concerns vs. Satisfaction: Toronto more concerned with public transit and traffic congestion; and more dissatisfied

Municipal Concerns vs. Voter Satisfaction

[asked of all respondents]

■ = Toronto
 ■ = Rest of GTHA

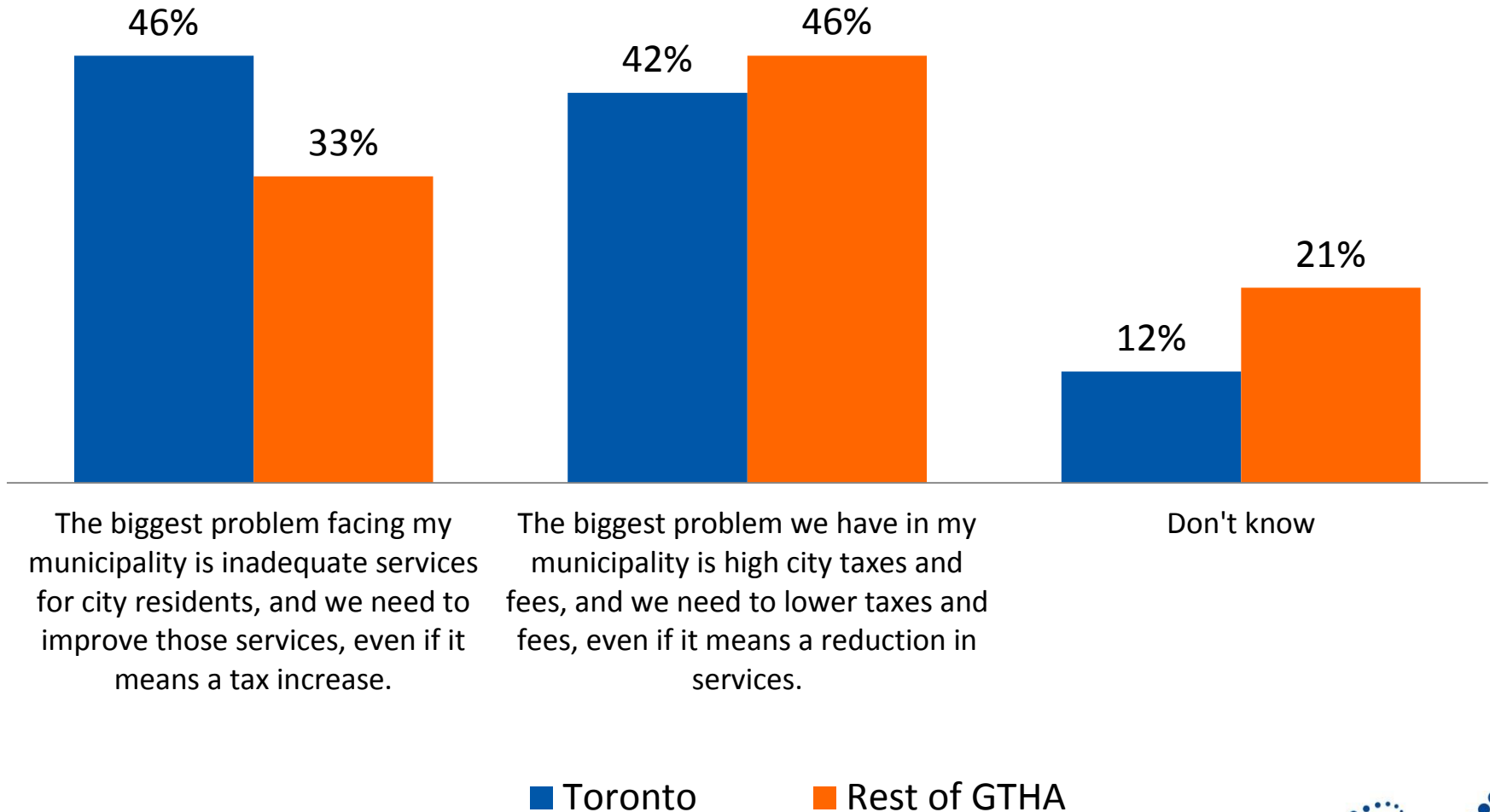


Municipal Taxes vs. Services: GTHA split on paying more taxes for improved services vs. fewer services for a tax break

Q

Please tell me which statement is closer to your personal point of view.

[asked of all 1,072 respondents]



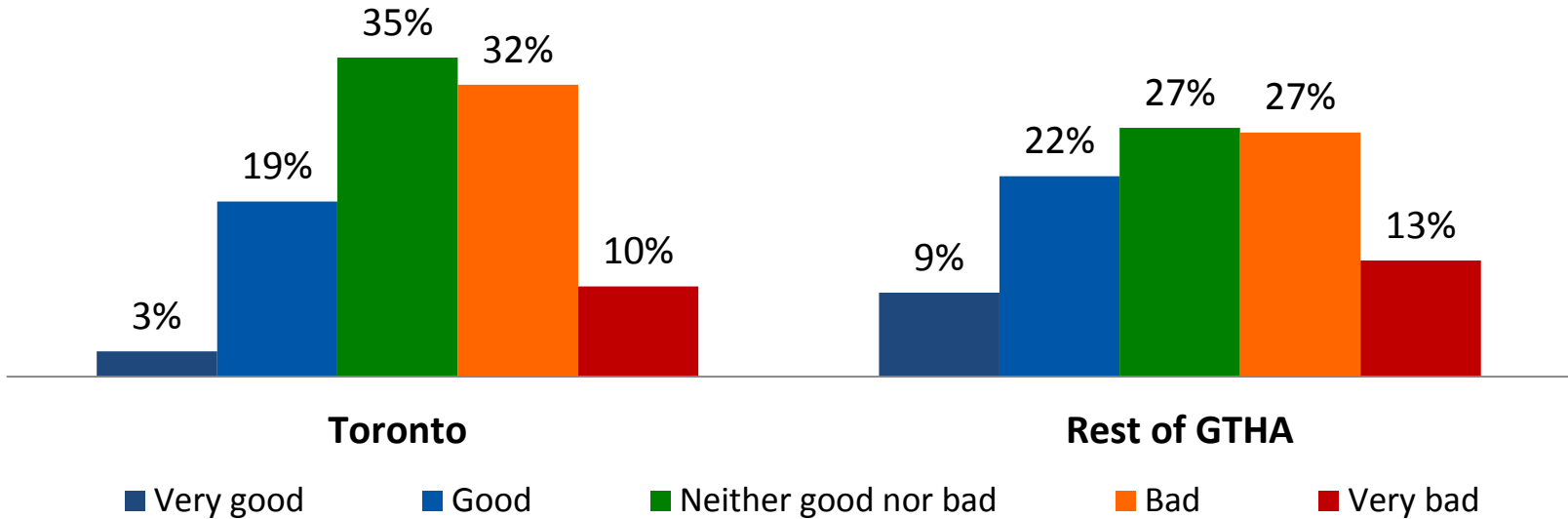
Transportation Usage Profile

Car Commuting: 41% GTHA drivers say traffic is bad on their commute

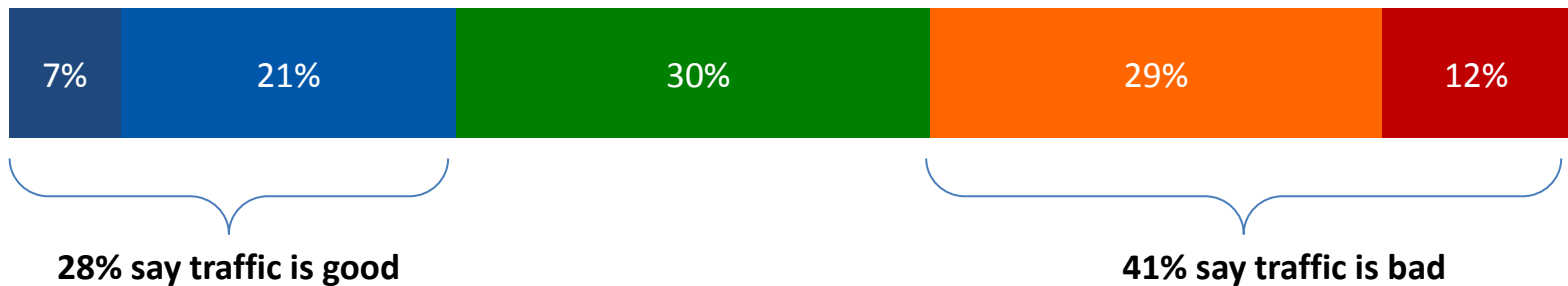
Q

Thinking about your commute, do you feel **traffic** on the route you typically use is good or bad?

[asked only of those who commute at least one day a week by car; n=642]



GTHA Average

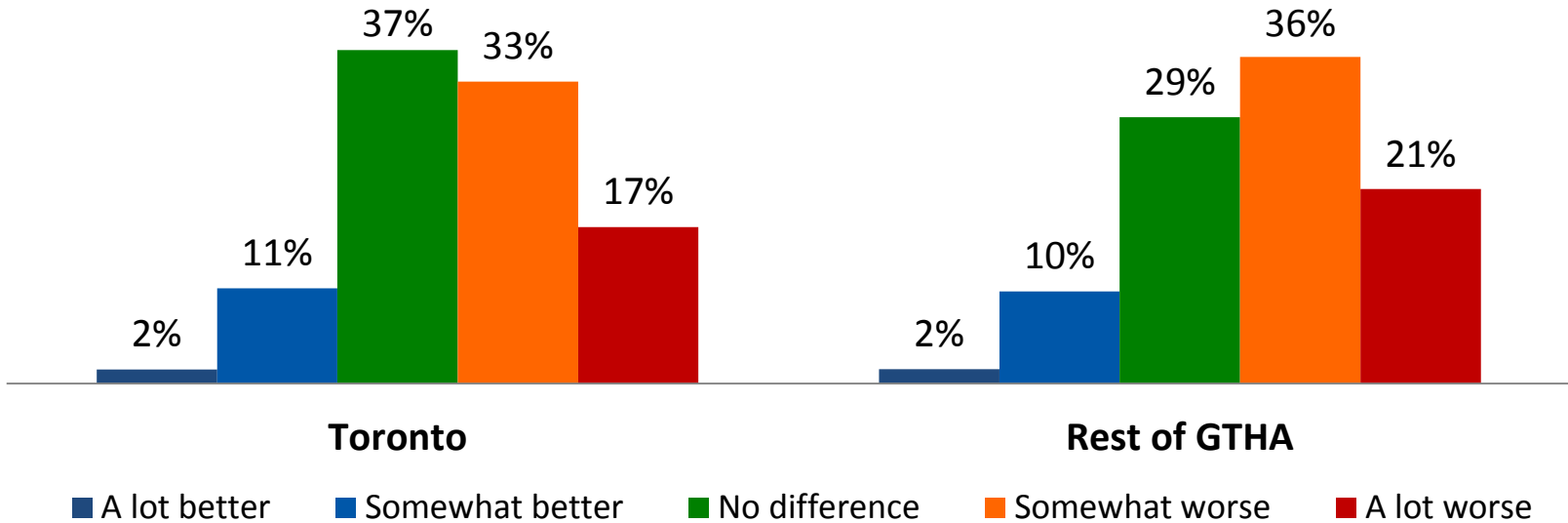


Car Commuting: A majority (55%) of GTHA drivers say traffic is getting worse on their commute

Q

Thinking about your commute, do you feel **traffic** on the route you typically use is getting better or worse?

[asked only of those who commute at least one day a week by car; n=642]



GTHA Average



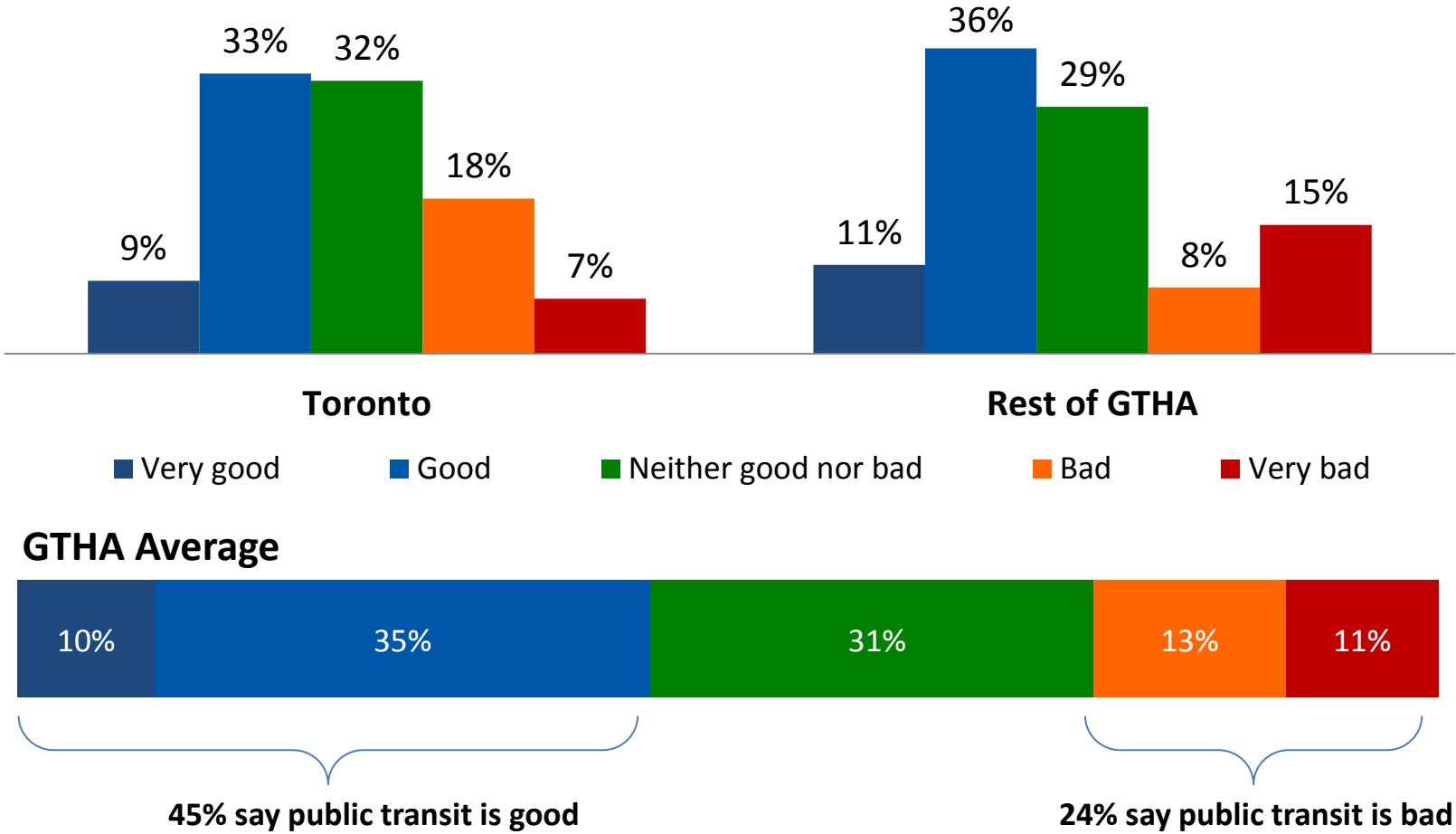
12% say traffic is getting better

55% say traffic is getting worse

Public Transit Commuting: 45% GTHA drivers say traffic is good on their commute vs. 24% who say bad



Thinking about your commute, do you feel **public transit** on the route you typically use is good or bad?
 [asked only of those who commute at least one day a week by public transit; n=374]

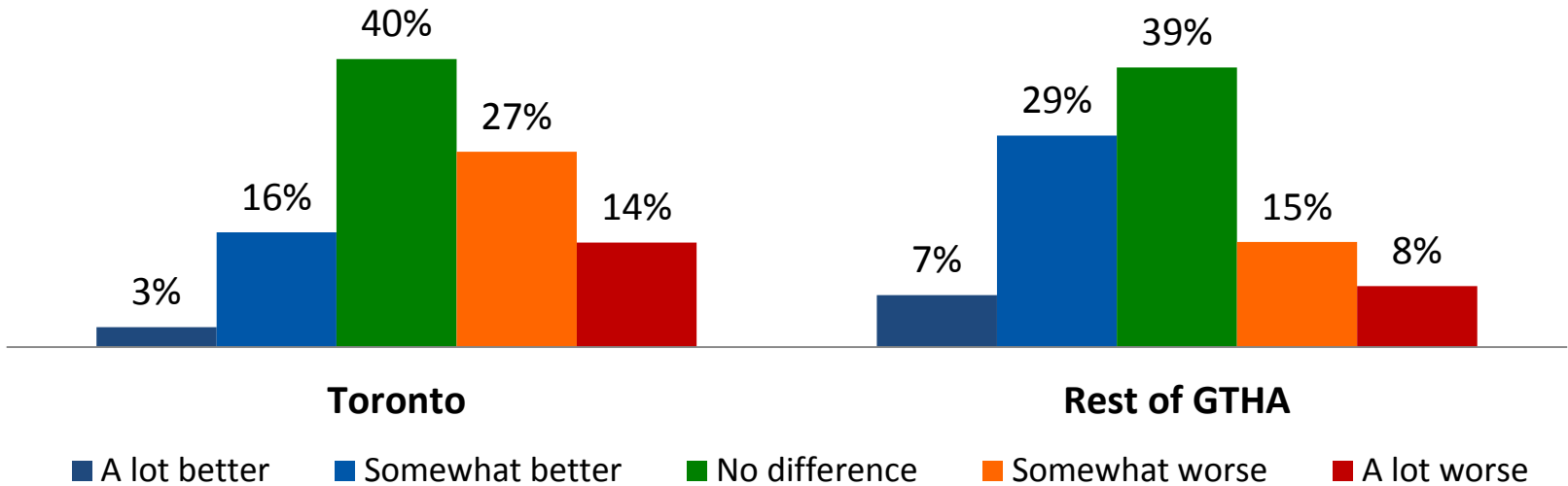


Note: 'Don't Know' not shown

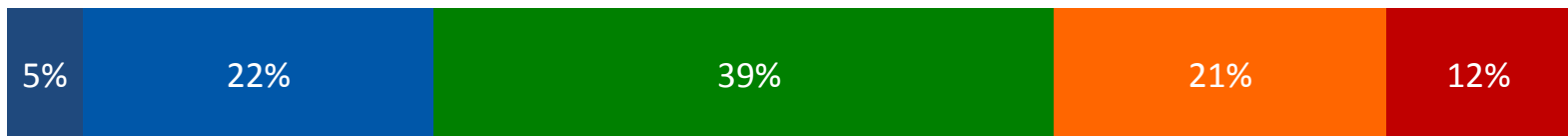
Public Transit Commute Future: 32% of GTHA residents say traffic is getting worse



Thinking about your commute, do you feel **public transit** on the route you typically use is getting better or worse?
[asked only of those who commute at least one day a week by public transit; n=374]



GTHA Average



27% say public transit is getting better

33% say public transit is getting worse



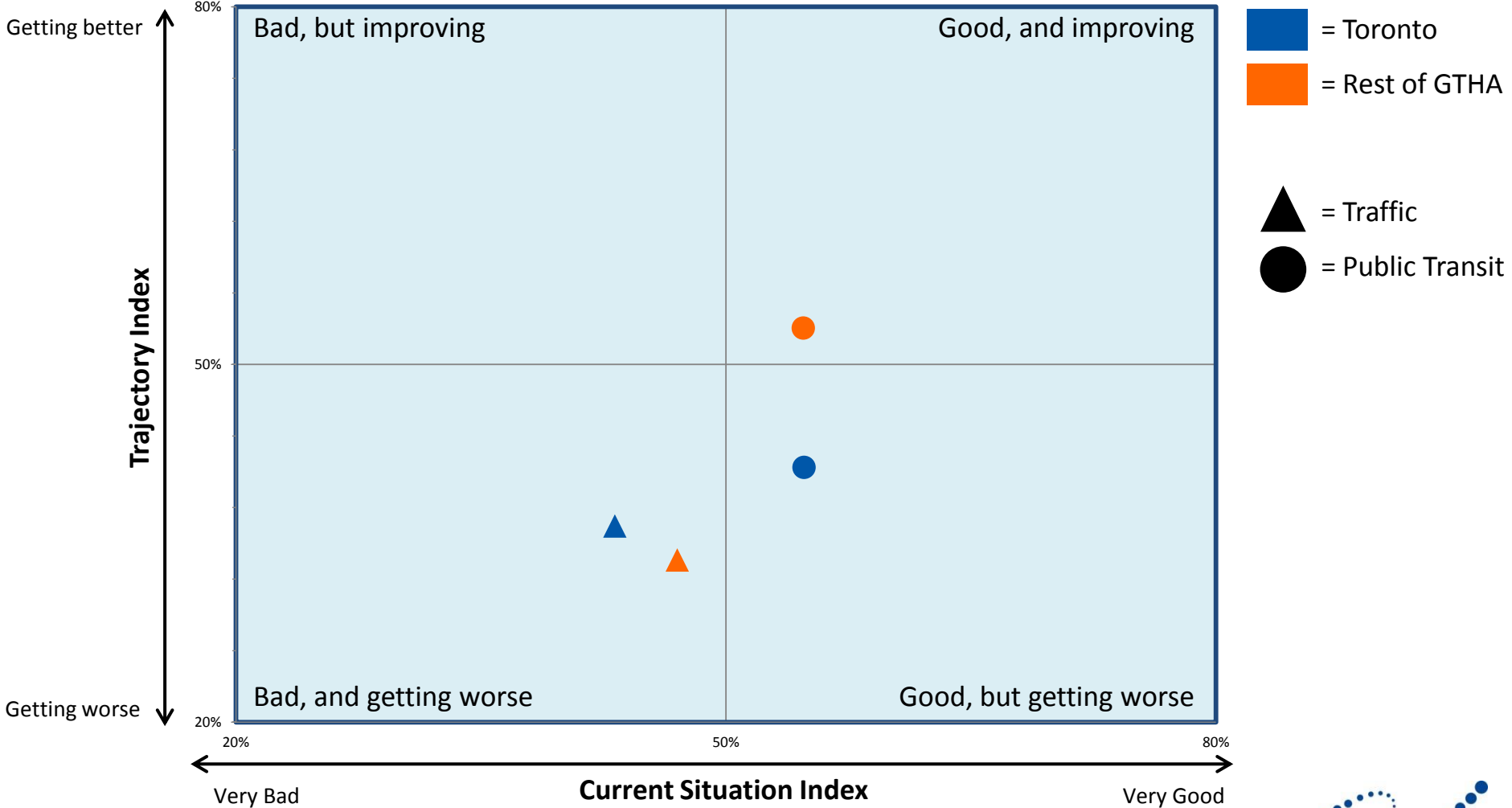
Note: 'Don't Know' not shown

Public Transit & Traffic Congestion:

Traffic congestion is bad and getting worse across the GTHA

Attitudes towards Commuting

[asked only of commuters who use public transit or drive to and from work]



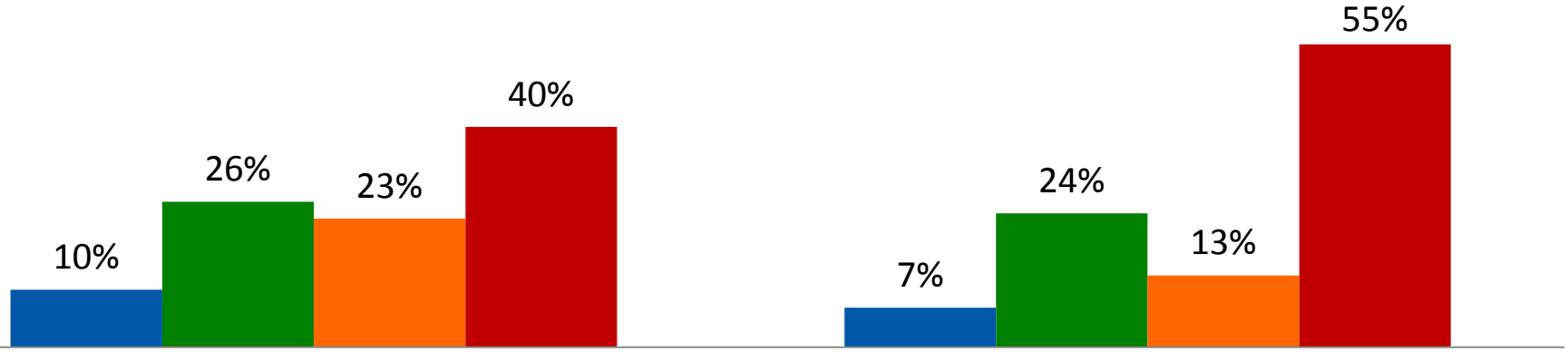
Solutions

Reducing Traffic Plan: Almost half (49%) of GTHA residents are unfamiliar with traffic reduction plan



How familiar are you with the plan to reduce **traffic congestion** in your community?

[asked of all respondents]



Toronto

Rest of GTHA

- Very familiar and can explain it to others in detail
- Have heard of a plan, but don't know any of the details

- Somewhat familiar, but don't know all the details
- Have not heard of any plans to reduce traffic congestion

GTHA Average

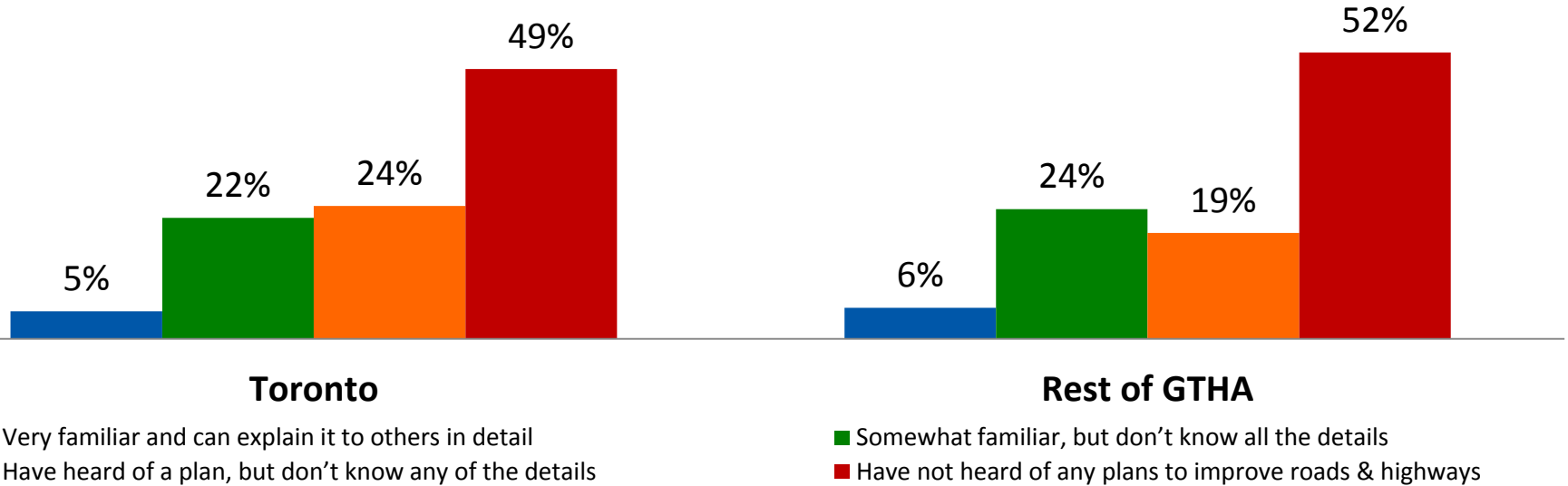


Improving Highways Plan: a majority of GTHA residents do not recall a plan to improve roads & highways

Q

How familiar are you with the plan to improve roads and highways in your community?

[asked of all respondents]



GTHA Average

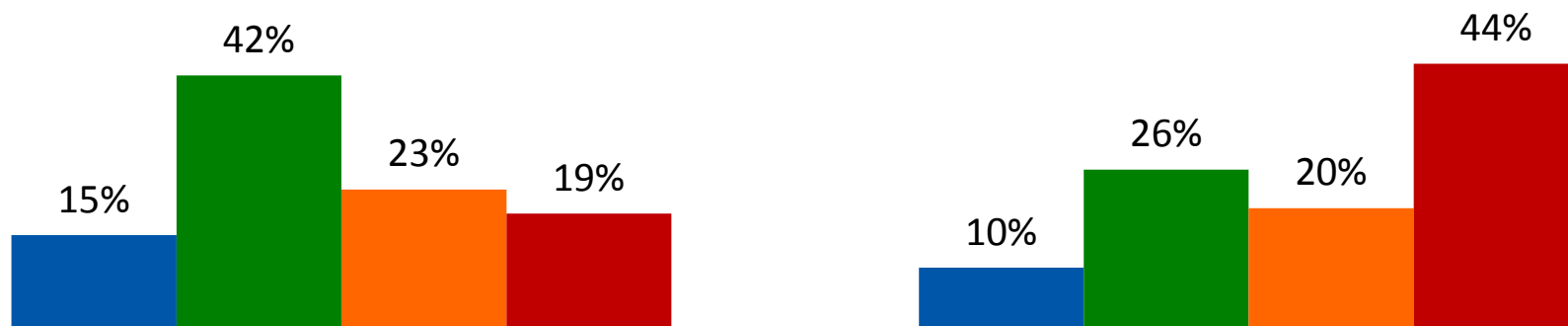


Improving Public Transit Plan: Torontonians more familiar with the plan than rest of GTHA (57% vs. 36%)

Q

How familiar are you with the plan to improve **public transit** in your community?

[asked of all respondents]



Toronto

Rest of GTHA

- Very familiar and can explain it to others in detail
- Have heard of a plan, but don't know any of the details

- Somewhat familiar, but don't know all the details
- Have not heard of any plans to improve public transit

GTHA Average

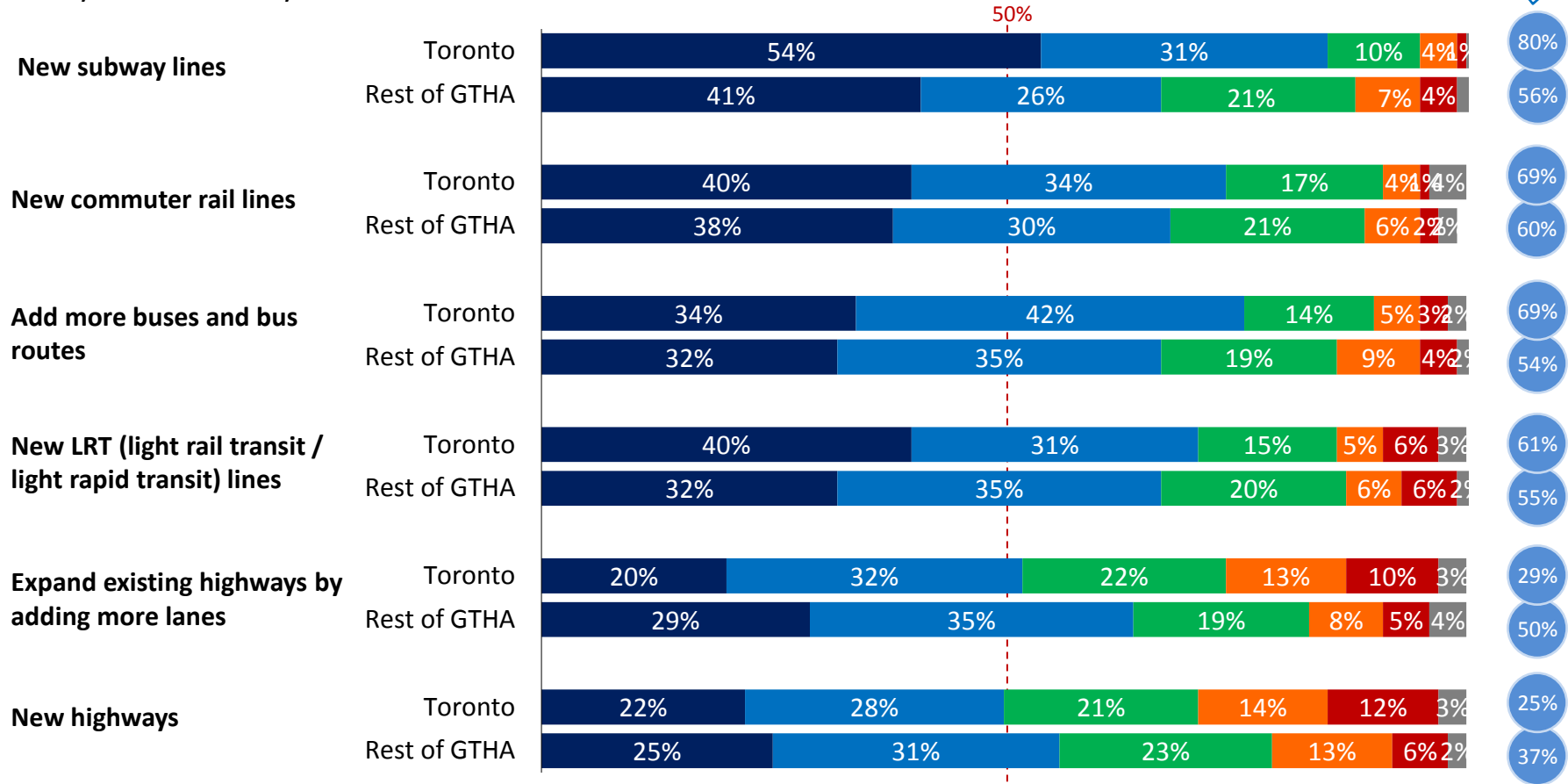


Solutions: in theory, a majority (54%) of Torontonians strongly support new subway lines to combat gridlock



As you may know, many cities across Canada are dealing with increased traffic congestion and gridlock. The following lists are some solutions that have been suggested for improving gridlock in Canadian cities. Please indicate if you support or oppose these solutions for your community. [asked of all 1072 respondents]

Net Support
(total support – total oppose)



■ Strongly support
 ■ Somewhat support
 ■ Neither
 ■ Somewhat oppose
 ■ Strongly oppose
 ■ Don't know



Best Way to Reduce Congestion: 73% agree the best way to reduce traffic congestion is public transit improvements

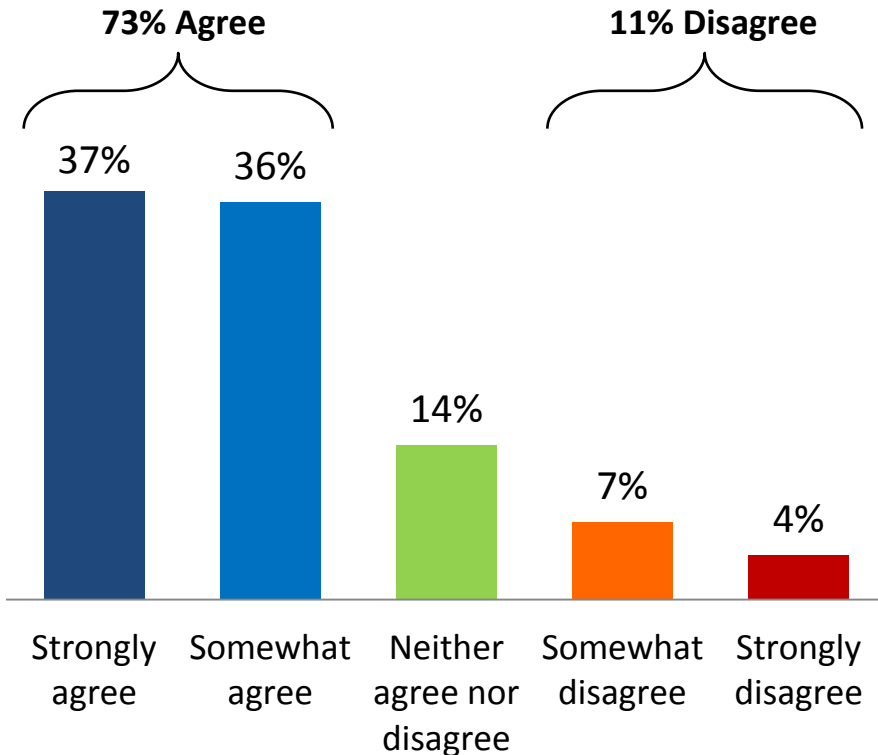


Some have suggested that we could help reduce traffic congestion if our public transit systems were improved.

Please indicate if you agree or disagree with the following statement:

Improvements to public transit systems are the best way to reduce traffic congestion in my community.

[asked of all 1072 respondents]



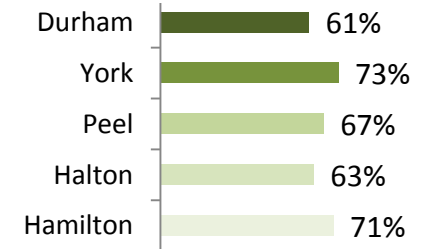
Sample Breakdown ▶▶

Those who say "agree"

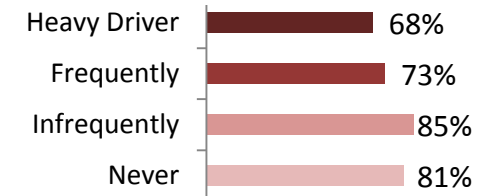
Urban/Suburban Segmentation



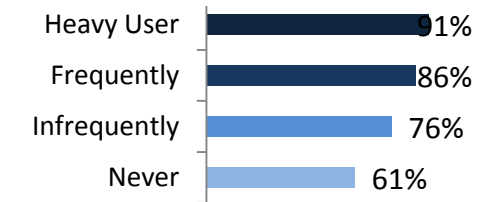
Rest of GTHA Segmentation



Driving Frequency



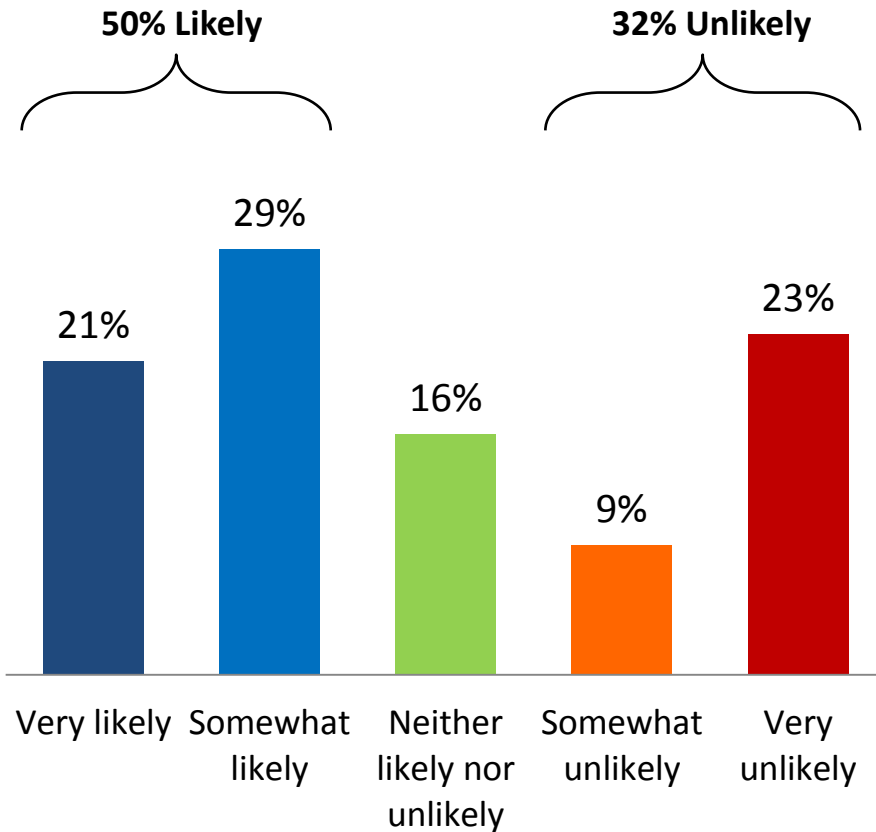
Public Transit Frequency



Note: 'Don't Know' (2%) not shown

Likelihood to Reduce Car Trips: 50% are likely to reduce their car trips per week if public transit were improved

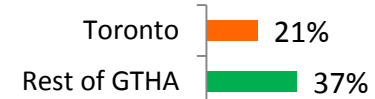
Q How likely are you to **reduce the number of car trips you make** in a typical week if public transit were improved along the route you usually take when commuting to and from work or school?
 [asked only of car commuters; n=642]



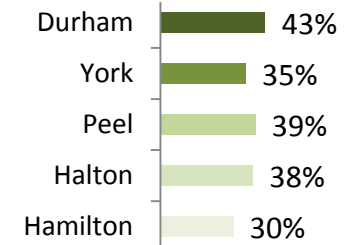
Sample Breakdown ▶▶

Those who say "unlikely"

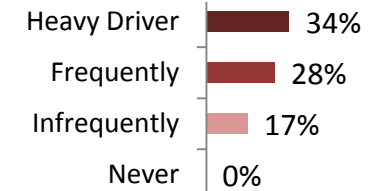
Urban/Suburban Segmentation



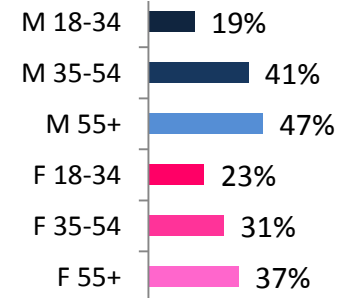
Rest of GTHA Segmentation



Driving Frequency



Age-Gender



Note: 'Don't Know' (1%) not shown

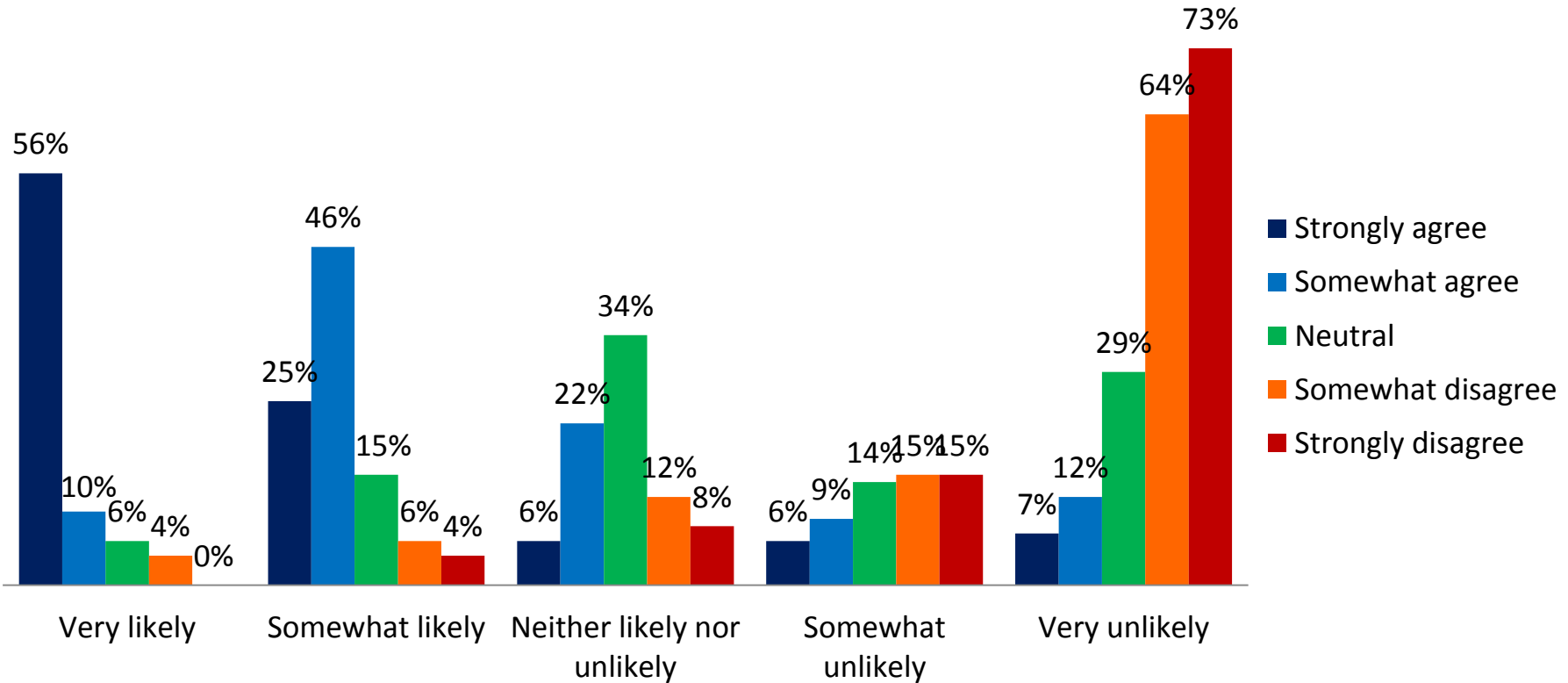
Belief Leads to Action: those who agree improving public transit is the best solution say they are more likely to use public transit if improved



How likely are you to **reduce the number of car trips you make** in a typical week if public transit were improved along the route you usually take when commuting to and from work or school?

vs.

Please indicate if you agree or disagree with the following statement: ***Improvements to public transit systems are the best way to reduce traffic congestion in my community.***



Who and How Should We Pay?

Who Should Pay for Public Transit Expansion: a plurality of GTHA residents (39%) would like to see user foot the bill ²⁸

Q

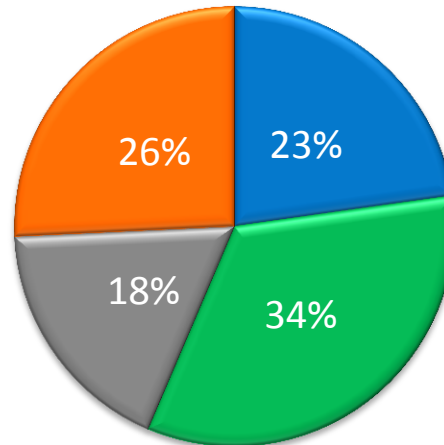
Who do you think should pay for public transit expansion and improvements in your community?

[asked of all respondents]

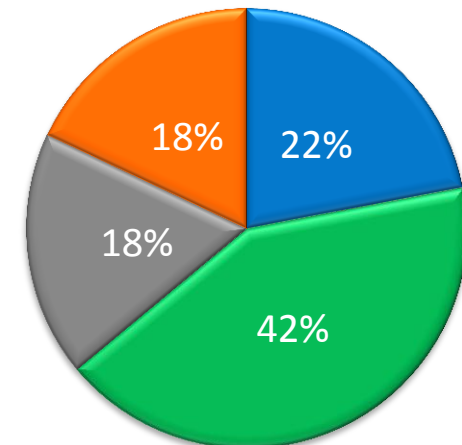
Please allocate how much each of the following groups should pay. Your answer must equal 100%.

1. [%] **Users** (who benefit from using public transit services)
2. [%] **Taxpayers** (who benefit from the option of using expanded public transit services)
3. [%] **Businesses** (who benefit from a more mobile workforce)
4. [%] **Real Estate Developers** (who put additional strain on the public transit system)

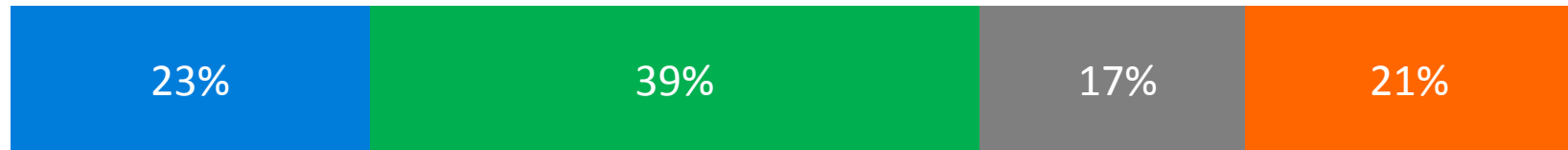
Toronto
(average distribution of shared costs)



Rest of GTHA
(average distribution of shared costs)



GTHA Average



■ Real Estate Developers

■ Users

■ Taxpayers

■ Businesses

Gov't Funding Public Transit: relatively consistent between Toronto and Rest of GTHA; local gov't should pay more



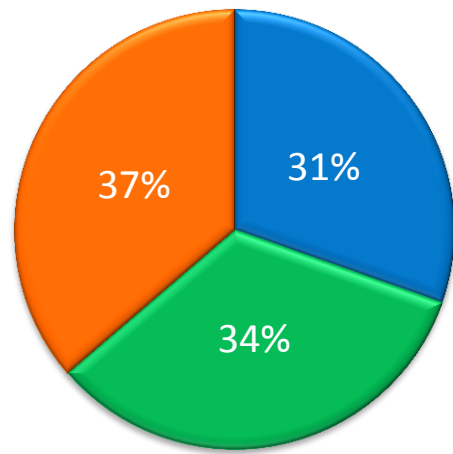
In terms of government funding for public transit expansion in your community, what share do you feel each level of government should provide?

[asked of all respondents]

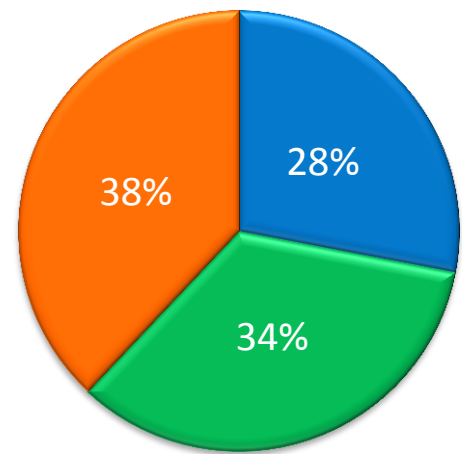
Please allocate how much each of the following groups should pay. Your answer must equal 100%.

- 1. [%] **Municipal government**
- 2. [%] **Provincial government**
- 3. [%] **Federal government**

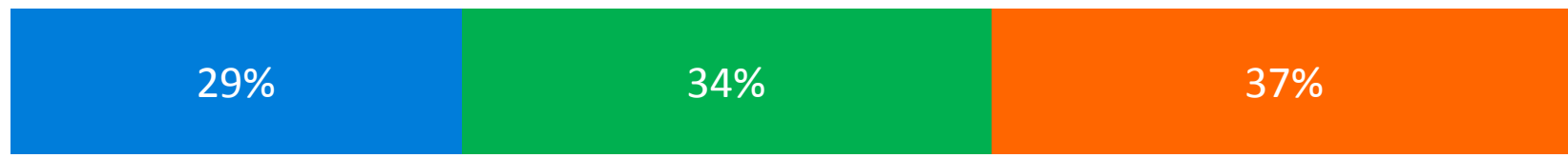
Toronto
(average distribution of shared costs)



Rest of GTHA
(average distribution of shared costs)



GTHA Average



■ Federal Government

■ Provincial Government

■ Municipal Government

Metrolinx Revenue Tools

Q

A number of revenue generation tools to fund public transit systems have been discussed and debated at the local, provincial and federal levels of government. Below is a list of the most commonly cited tools.

For each revenue tool, please indicate if you generally support or oppose the option.

- **Development Charges** (One-time levies imposed on new residential, commercial or industrial buildings).
- **Employer Payroll Tax** (Tax paid by employers based on the number of employees or salaries paid to employees).
- **Fuel Tax** (Tax levied on the sale of gasoline).
- **High Occupancy Tolls (HOT)** (A toll on vehicles with 1 person who use high occupancy lanes on designated highways. HOT lanes would be free for vehicles with 2 people or more).
- **Highway Tolls** (Toll paid per km travelled on designated highways).
- **Land Value Capture** (Collects a share of the increased property values that results from transit investment. That is, if a subway line were hypothetically expanded to your community, neighbourhood property values would likely increase. When you sell your home, a portion of any capital gains would be allocated to a transit fund).
- **Parking Space Levy** (A levy charged to all non-residential parking lot owners, including shopping centres and businesses with employee parking)
- **Property Tax Increase** (A percentage based tax applied on value of residential, commercial and industrial properties).
- **Regional Sales Tax** (A percentage rate applied on goods and services within a particular region).
- **Transit Fare Increase** (An increase in public transit fares)
- **Vehicle Kilometres Travelled (VKT) Fee** (Drivers pay for every km travelled within designated area, recorded through a transponder or GPS).

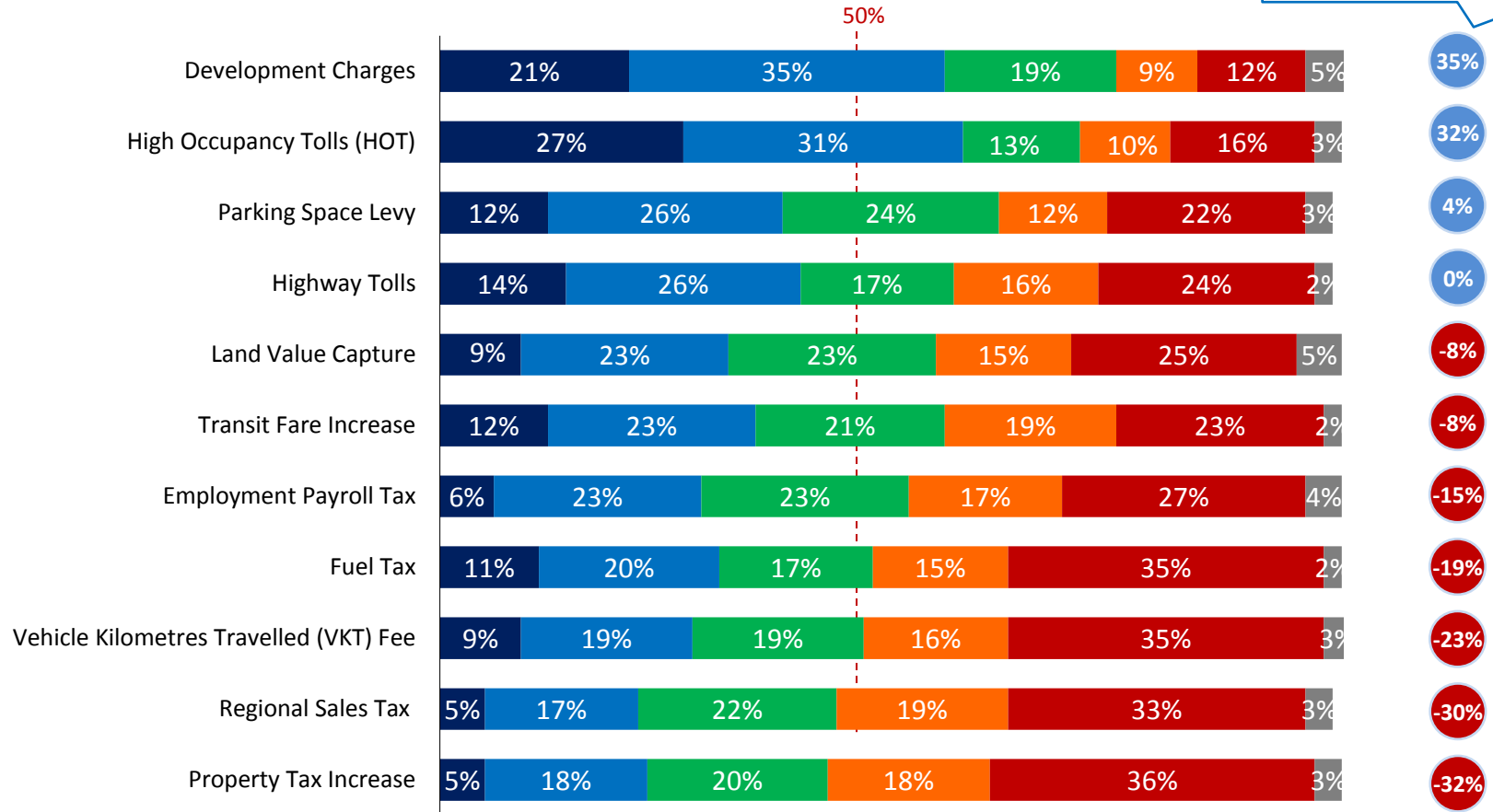
Revenue Tools: greatest support for development charges and HOT lanes; parking space levy and tolls to a lesser extent



A number of revenue generation tools to fund public transit systems have been discussed and debated at the local, provincial and federal levels of government. Below is a list of the most commonly cited tools. For each revenue tool, please indicate if you generally support or oppose the option.

[asked of all 1072 respondents]

Net Support
(total support– total oppose)



■ Strongly support
 ■ Somewhat support
 ■ Neither
 ■ Somewhat oppose
 ■ Strongly oppose
 ■ Don't know

Net Support for Revenue Tools: Net support for Development Charges and HOT lanes among all user groups

Q

For each revenue tool, please indicate if you generally support or oppose the option.

[asked of all 1072 respondents]

Net Support (total support minus total oppose)

	GTHA	Toronto	Rest of GTHA	More service; more tax	Less tax; less service
Development Charges	35%	41%	30%	52%	20%
High Occupancy Tolls (HOT)	32%	40%	26%	45%	22%
Parking Space Levy	4%	30%	-14%	23%	-6%
Highway Tolls	0%	12%	-9%	21%	-23%
Land Value Capture	-8%	-1%	-12%	11%	-26%
Transit Fare Increase	-8%	-24%	3%	-16%	0%
Employment Payroll Tax	-15%	-3%	-23%	-4%	-21%
Fuel Tax	-19%	4%	-35%	6%	-38%
Vehicle Kilometres Travelled (VKT) Fee	-23%	-4%	-35%	-6%	-39%
Regional Sales Tax	-30%	-22%	-37%	-7%	-46%
Property Tax Increase	-32%	-23%	-37%	-4%	-56%

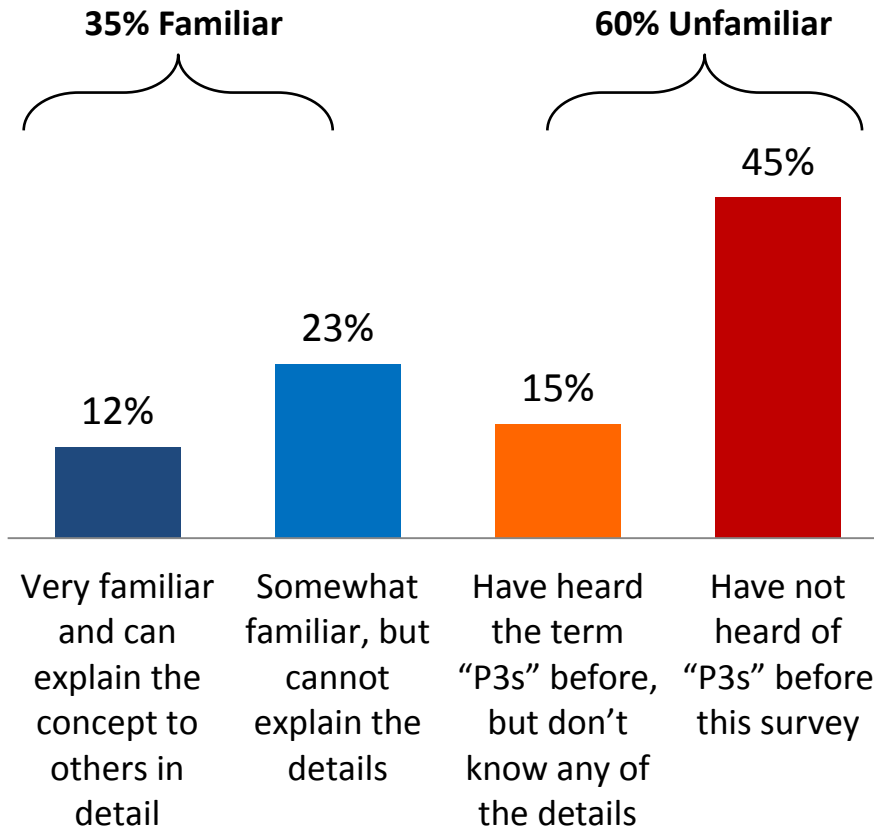
Public-Private Partnerships (P3s)

P3 Familiarity: 60% unfamiliar with P3s

Q

Another option to help fund public transit system upgrades is a concept called “Public-Private Partnerships”, “PPP” or “P3s”. How familiar are you with the concept of public-private partnerships?

[asked of all 1072 respondents]



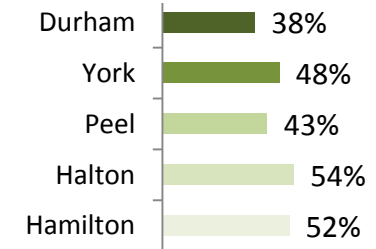
Sample Breakdown ▶▶

Those who say “have not heard”

Urban/Suburban Segmentation



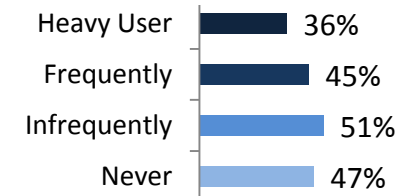
Rest of GTHA Segmentation



Driving Frequency



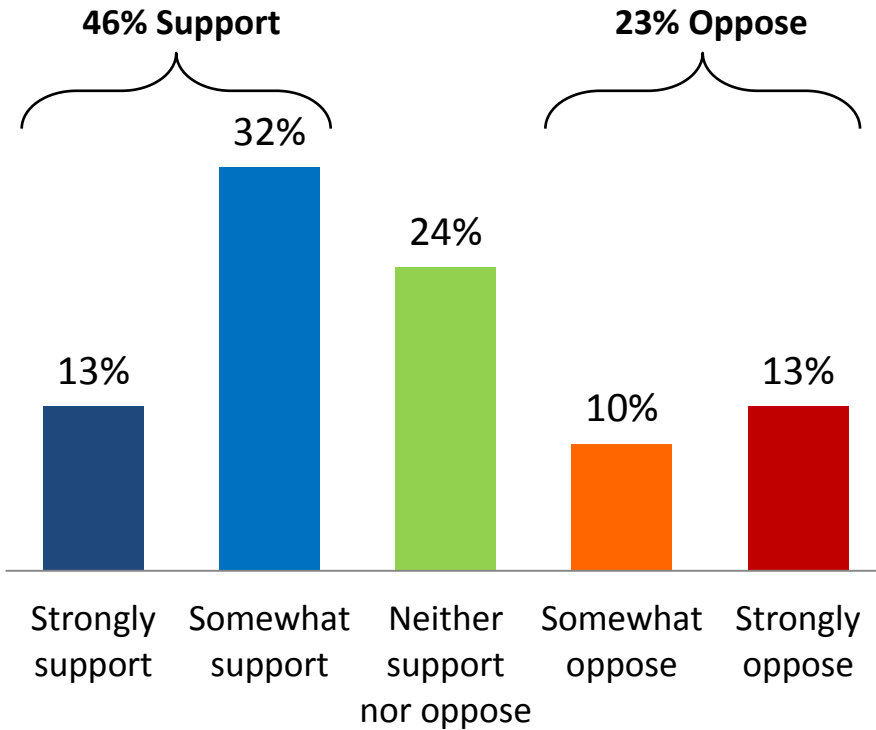
Public Transit Frequency



Private Sector Support: 46% support

Q As you may know, public-private partnerships are projects that involve the private sector in delivering of government services. Do you support or oppose the general idea of increasing the involvement of the private sector in the delivery of government services, such as roads and public transit?

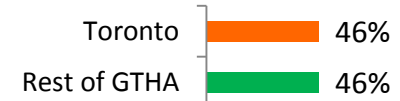
[asked of all 1072 respondents]



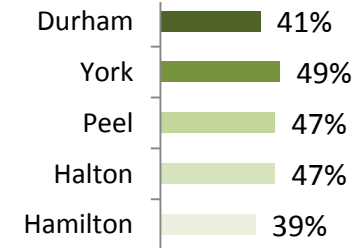
Sample Breakdown ▶▶

Those who say "support"

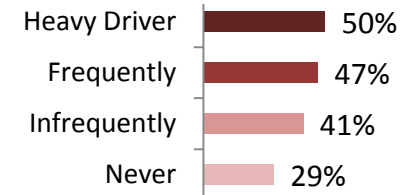
Urban/Suburban Segmentation



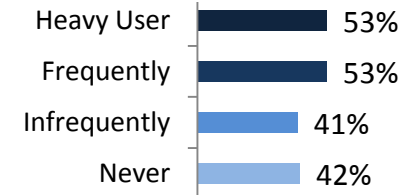
Rest of GTHA Segmentation



Driving Frequency



Public Transit Frequency



Note: 'Don't Know' (7%) not shown

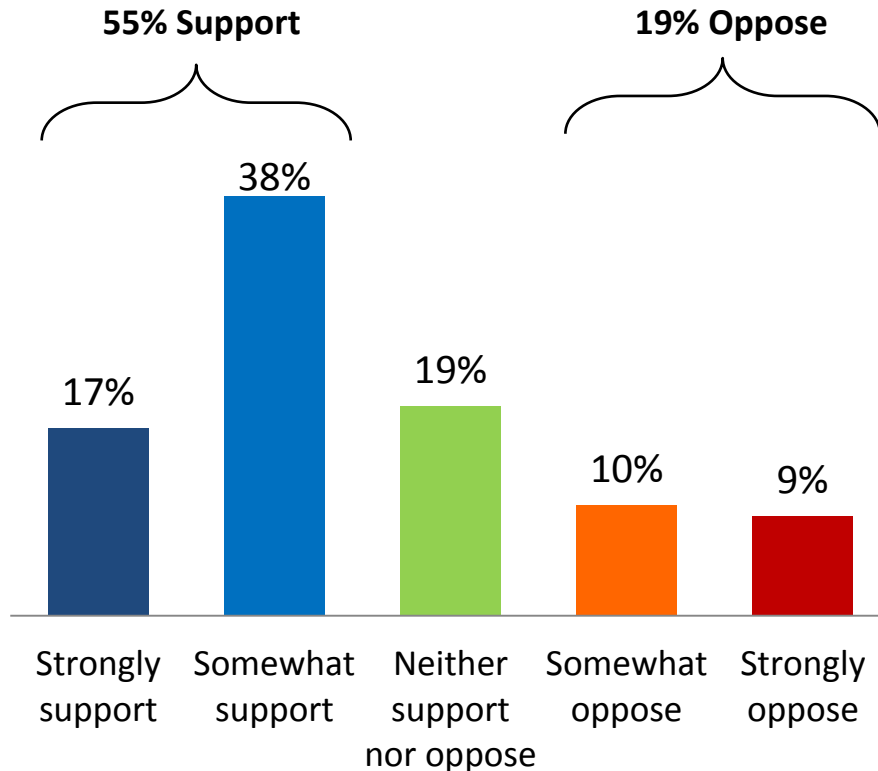
Road and Highway Improvements: 55% support



As you may be aware, government debts have been rising both to pay for needed infrastructure and to pay for deficits run up during the recent economic downturn. This has limited the ability of government to fund new road and public transit improvements.

Would you support or oppose increasing involvement of the private sector in **new road and highway improvements** if it means we can build more improvements faster than if government did it alone?

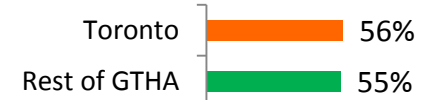
[asked of all 1072 respondents]



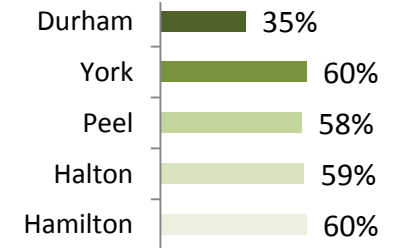
Sample Breakdown ▶▶

Those who say "support"

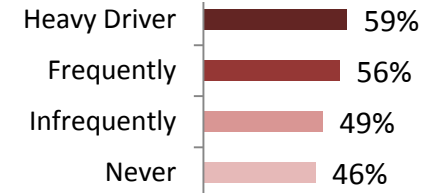
Urban/Suburban Segmentation



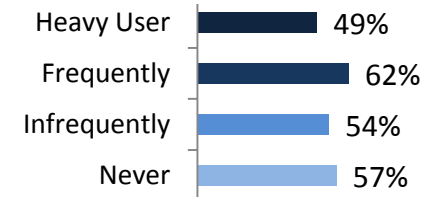
Rest of GTHA Segmentation



Driving Frequency



Public Transit Frequency



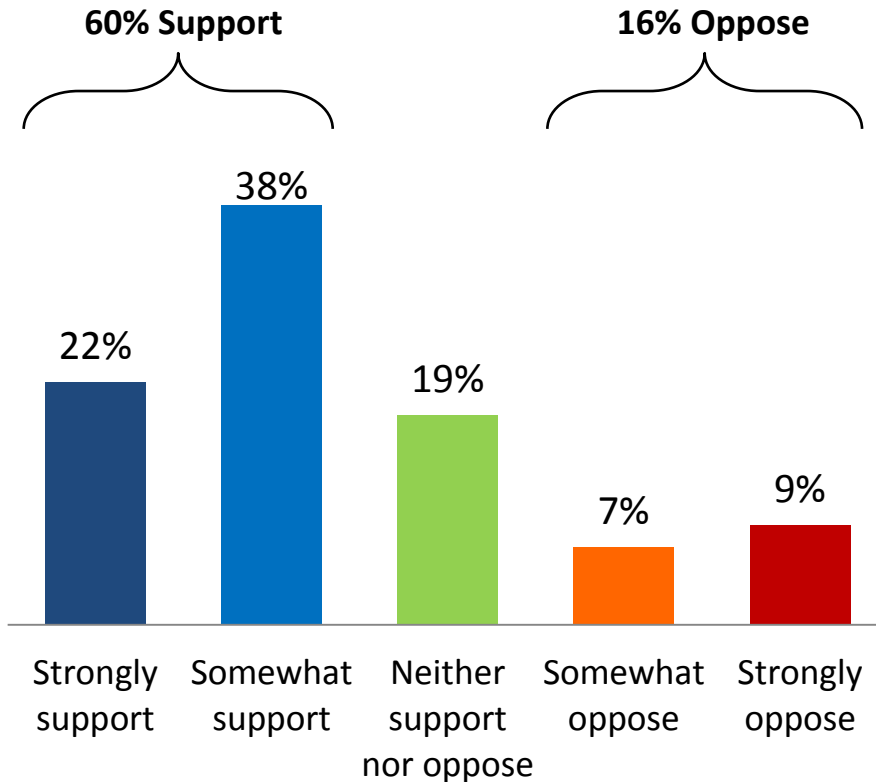
Note: 'Don't Know' (6%) not shown

Public Transit Improvements: 60% support

Q

Would you support or oppose increasing involvement of the private sector in **new public transit improvements** if it means we can build more improvements faster than if government did it alone?

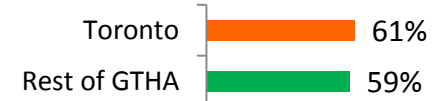
[asked of all 1072 respondents]



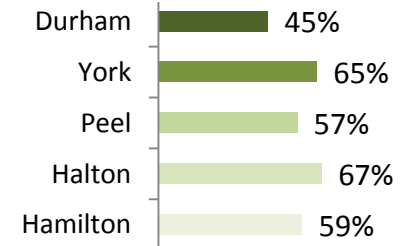
Sample Breakdown ▶▶

Those who say "support"

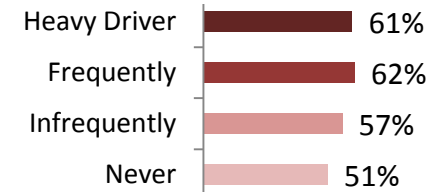
Urban/Suburban Segmentation



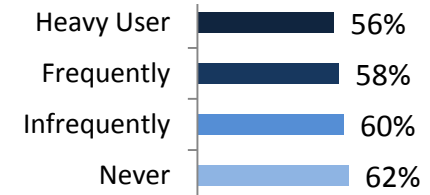
Rest of GTHA Segmentation



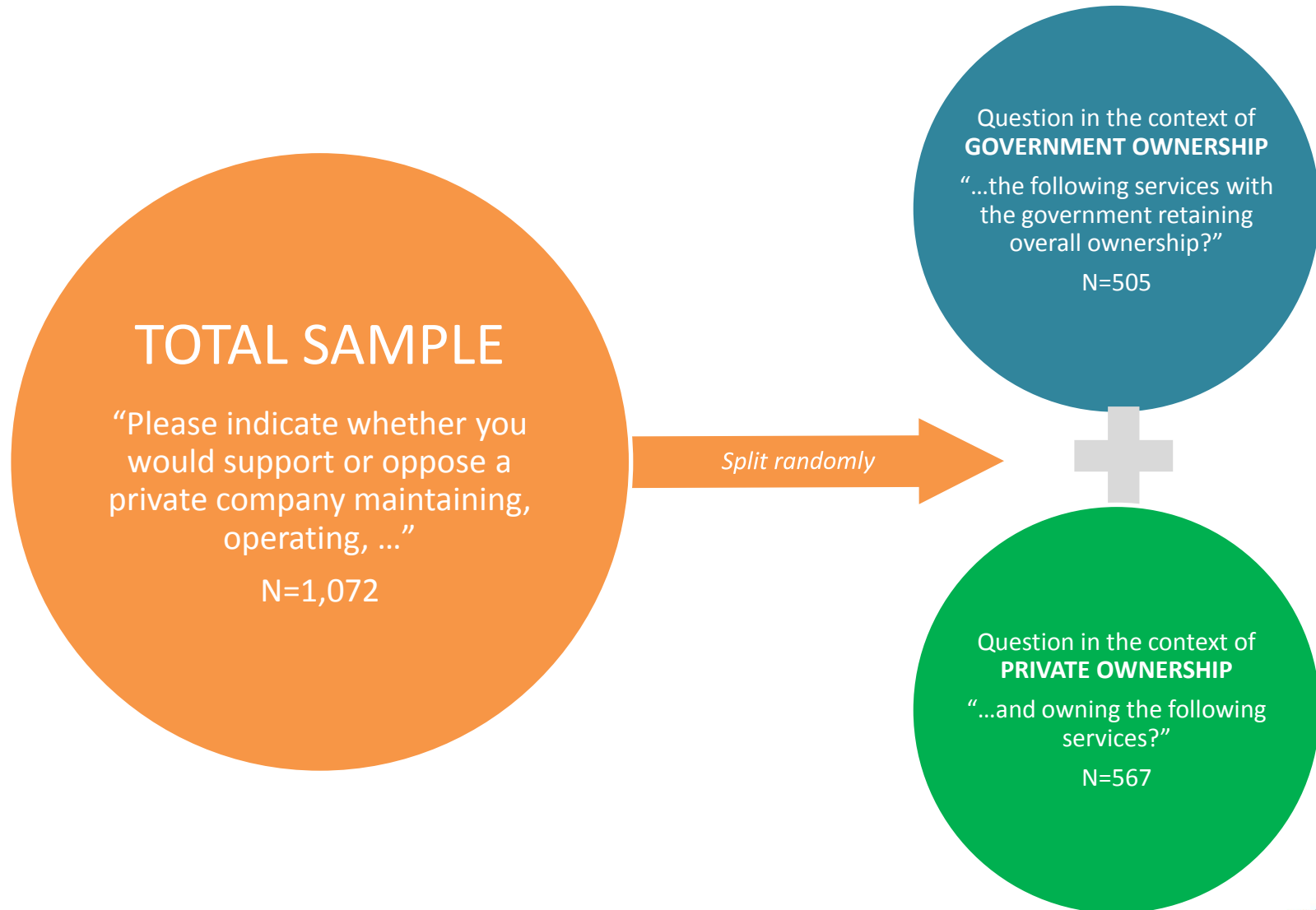
Driving Frequency



Public Transit Frequency



Government vs. Private Ownership: split sample



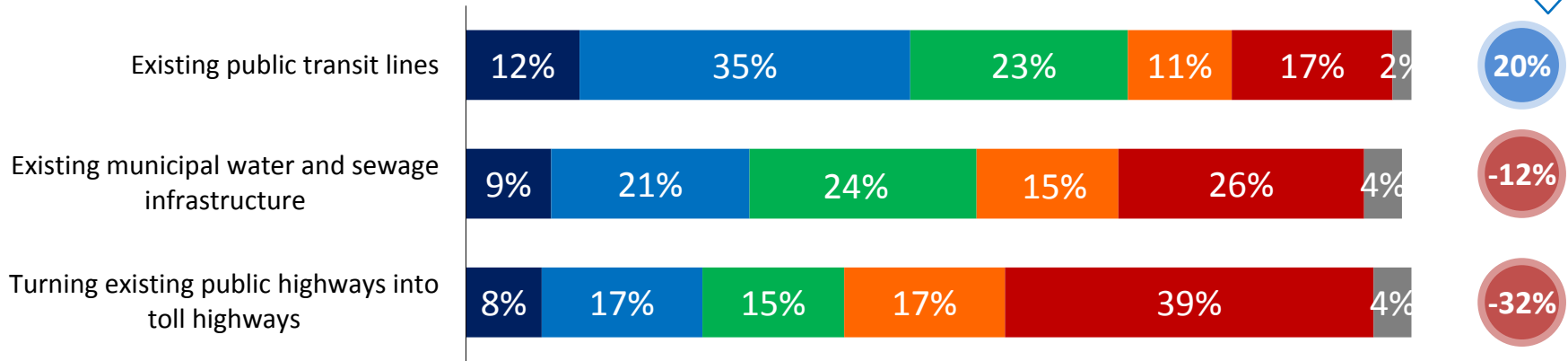
Government vs. Private Ownership: positive net support for P3s on expanding existing public transit lines



Please indicate whether you would support or oppose a private company maintaining and operating the following services with the government retaining overall ownership? **[Government Ownership]**

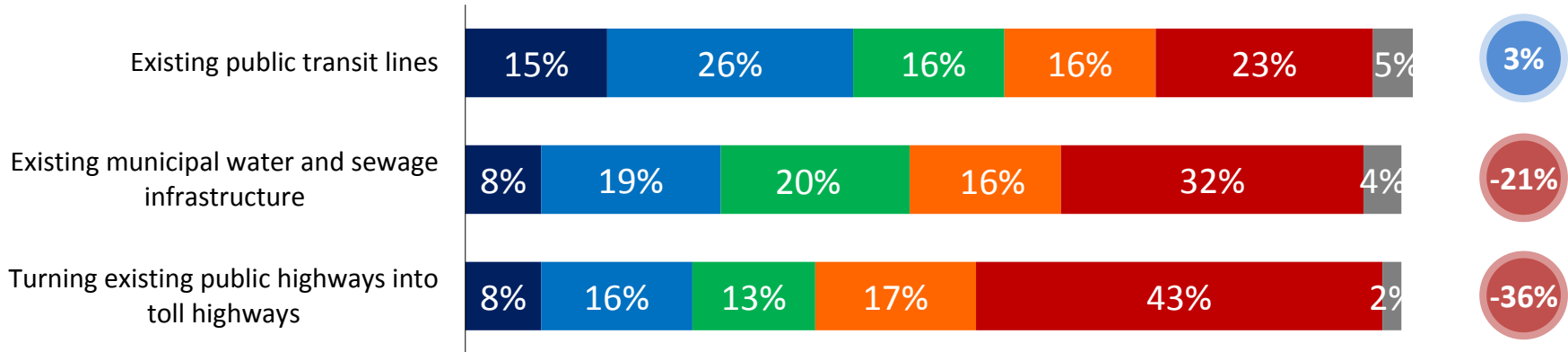
[split sample; asked of half of respondents]

Net Support



Please indicate whether you would support or oppose a private company maintaining, operating and owning the following services? **[Private Ownership]**

[split sample; asked of half of respondents]



■ Strongly support
 ■ Somewhat support
 ■ Neither
 ■ Somewhat oppose
 ■ Strongly oppose
 ■ Don't know

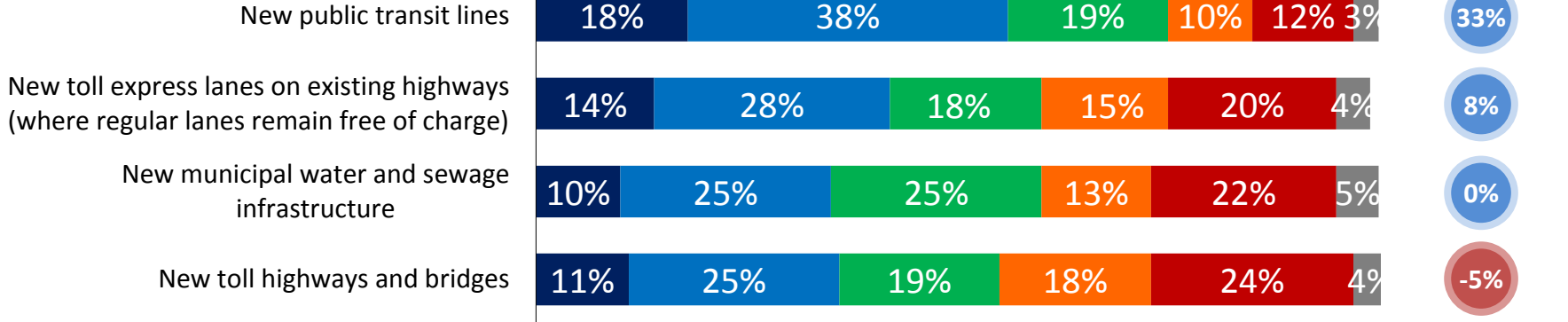
Government vs. Private Ownership: positive net support for P3s on building new public transit lines and HOT lanes

Q

Again, please indicate whether you would support or oppose a private company financing, building, maintaining and operating the following services with the government retaining overall ownership?

[Government Ownership]

[split sample; asked of half of respondents]

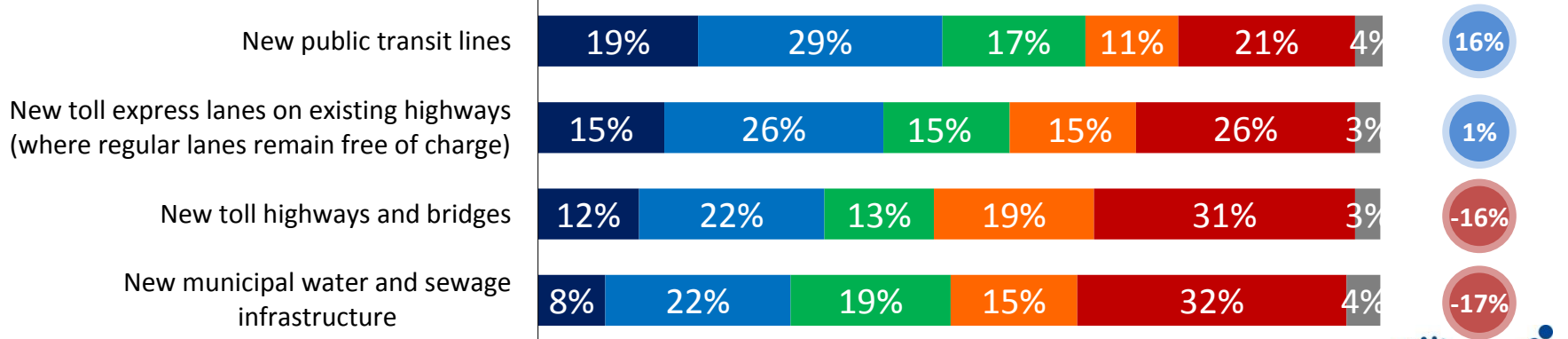


Q

Again, please indicate whether you would support or oppose a private company financing, building, maintaining, operating and owning the following services?

[Private Ownership]

[split sample; asked of half of respondents]



■ Strongly support
 ■ Somewhat support
 ■ Neither
 ■ Somewhat oppose
 ■ Strongly oppose
 ■ Don't know



Research-based strategic advice.

Public Affairs • Corporate Communications • Fundraising

All intellectual property rights, including without limitation all copyright and know-how in the research techniques, research specifications or any information or material provided in this document, shall remain the property of, and are confidential to Innovative Research Group Inc. As such, any information contained herein may not be reproduced or translated, stored in a retrieval system, or transmitted in any form, or by any means, electronic, mechanical, photocopying or otherwise to third parties without the prior written permission of Innovative Research Group Inc.

For more information, please contact:

Jason Lockhart
Vice President
Innovative Research Group Inc.
56 The Esplanade, Suite 310
Toronto ON | M5E 1A7

(t) 416-642-7177
(f) 416-640-5988
(e) jlockhart@innovativeresearch.ca
www.innovativeresearch.ca