

Public Bicycle System Market Research January 17-23, 2008

A telephone survey of GVRD residents; and
an on-Line survey of www.translinklistens.bc.ca panelists

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Background and Purpose



TransLink is investigating the feasibility of installing a self-serve automated public bicycle system within Metro Vancouver.

Self-serve public bicycle systems, such as Paris' hugely successful new "Vélib," provide access to bicycles via smart card or credit card activated kiosks located at regular intervals across an urban area.

In early 2008, TransLink is undertaking a feasibility study and working with municipal partners to conduct a thorough investigation of the options.

As part of the feasibility study, two surveys were commissioned by TransLink to gauge the level of interest in an automated public bicycle system. This included a telephone survey of GVRD residents and a web survey of TransLink Listens panelists.



One of 1,451 Vélib docking stations located every 300m in Paris

Research Method: Telephone Survey



- ✓ 503 Metro Vancouver residents aged 16 or older were surveyed on Synovate's monthly ConsumerScope™ telephone omnibus, from January 17 to 23, 2008.
- ✓ At the data processing stage, the data was weighted by region, gender and age to ensure the final sample was an accurate reflection of GVRD residents aged 16+.
- ✓ At the 95% level of confidence, the maximum margin of error on a sample of 500 is +/-4.5%. The margins of error between smaller sub-samples are wider.



Research Method: TransLink Listens Panel Survey



- ✓ The questionnaire used in the web panel survey was almost identical to that used in the phone survey, but contained additional questions positioned at the end.
- ✓ Out of 4409 panelists invited, 2089 (47 percent) completed the survey between January 17 and 23, 2008.
- ✓ Using Canada Census results, the data were weighted to be reflective of Metro Vancouver residents on the basis of age, gender, region and main mode of transportation.
- ✓ Ranges of error are not cited for panels because panelists select themselves for inclusion, unlike telephone polls where respondents are randomly selected.
- ✓ Throughout the report, web panel results are shown under separate column headings from the telephone survey.
- ✓ Verbatim comments for the TransLink Listens panel survey were not summarized into categories, but are provided in an Appendix bound under separate cover for reference.

Summary



Heard/Read about Public Bicycles

- o Just under one-third (30%) of the general public have read/heard about automated public bicycle services in the past 12 months. Awareness among panelists was higher (46%).

Likelihood to Use

- o Roughly two-in-five say they would be “very or somewhat” likely to use a free public bicycle service if offered at no charge; one-fifth would be “very” likely to use it.
- o At a cost of \$1 per hour, one-third would be “very or somewhat” likely to use the service; thirteen percent would be “very” likely to use it.

Support for Using Existing Road Space

- o The large majority (approx. 80 percent) supports using some of the existing road space to accommodate a public bicycle service.
 - o Reasons for support are that it is *environmentally friendly, promotes health/fitness, reduces traffic congestion* and *improves cycling safety*.
 - o Reasons for opposition include concerns about *traffic congestion/delays, inequitable/wasteful use of taxes*, that *it won't reduce car use*, and *safety of cyclists and drivers*.

Summary (cont'd)

Support for Increased Outdoor Advertising

- o Most (approx. 80 percent) support increased outdoor advertising to help finance a public bicycle service.
- o A strong majority (approx. 80 percent or higher) supports each of the three proposed forms of outdoor advertising. Having advertising panels at docking stations received the highest support; support was slightly lower for “advertising on the bikes” and “corporate branding of the bikes”.

Are TransLink and Municipal Governments Doing Enough?

- o Over 80 percent consider vehicle emissions to be a serious or very serious problem in the Lower Mainland.
- o Over 70 percent consider traffic congestion to be a problem in their local municipality.
- o Roughly 60% disagree that TransLink and municipal governments are doing enough to create new sustainable transportation choices for Lower Mainland residents.

Incidence and Mode Share of Short Trips

- o On average, the general public makes about 11 trips of less than 5 km per week; panelists make about 9 short trips per week.
- o For trips of less than 5 km, driving alone is the most common mode of transport (by roughly two-in-five), followed by walking, and riding in a vehicle with a passenger. Among the general public, only one percent of short trips are made by bicycle; among panelists, 3 percent make short trips by bike.



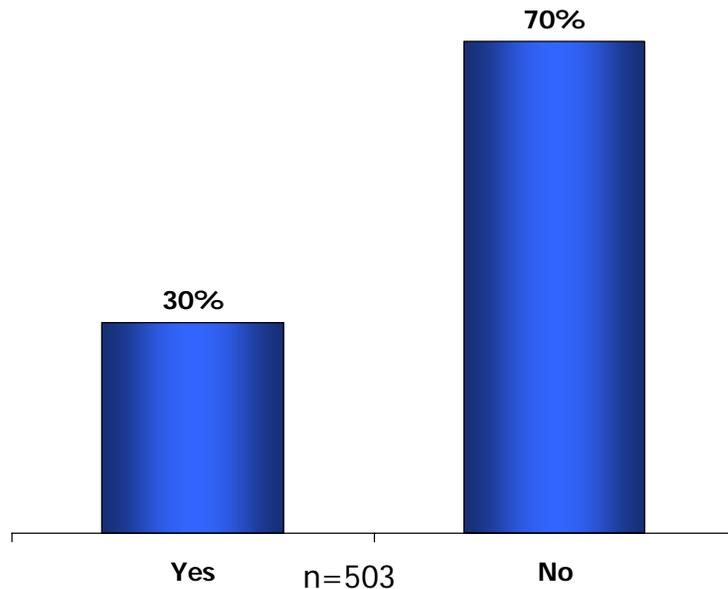
Detailed Findings

Heard or Read About Public Bicycle Services

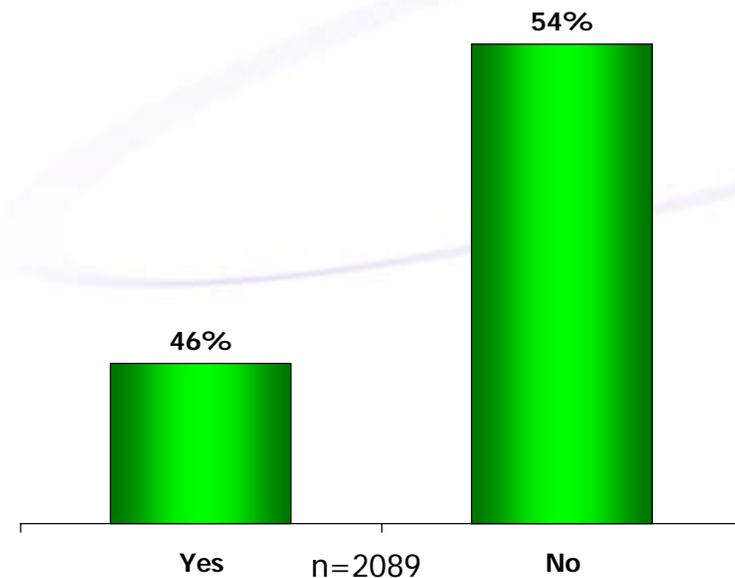


Q1. Have you heard or read anything about automated public bicycle services in the past twelve months? These services go by several different names including shared-use bicycles and city bicycles.

Synovate Telephone Survey



TransLink Listens Web Panel Survey



o Just under one-third (30%) of the general public have read/heard about automated public bicycle services in the past 12 months. Awareness of this among panelists is higher (46%).

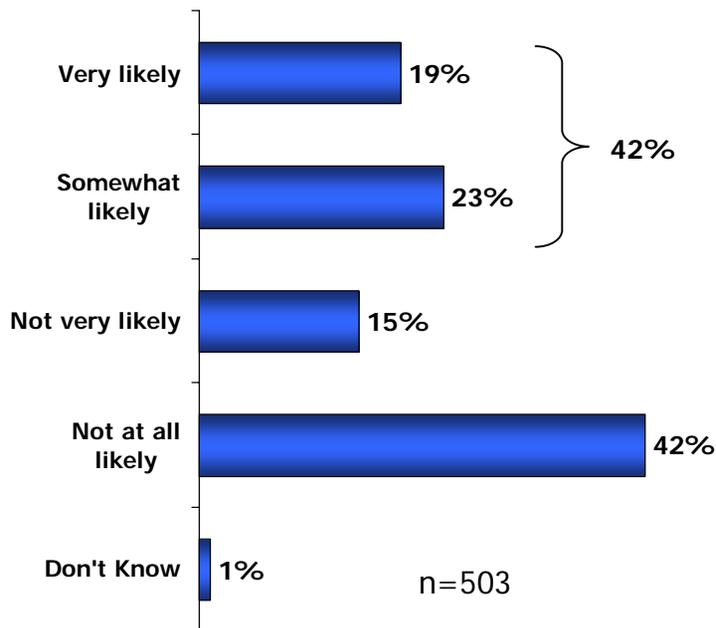
Likelihood to Use Public Bicycle Service at No Charge



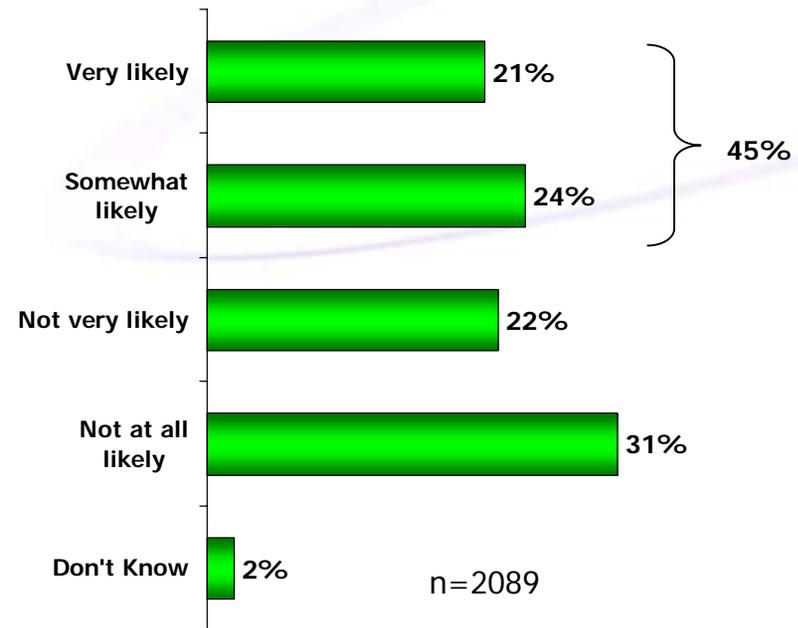
Automated self-serve public bicycle services are available in major cities around the world, including Paris, Lyon, Barcelona and Munich. These systems consist of a network of high-quality theft-resistant bicycles parked at docking stations located every few blocks. Using an access card or credit card, it is quick and easy to access a bicycle which can then be returned to any other docking station in the network. As a result, one-way trips are possible.

Q2. If this new public bicycle service were available to the public to use at no charge, how likely would you be to use it at least once a month?

Synovate Telephone Survey



TransLink Listens Web Panel Survey



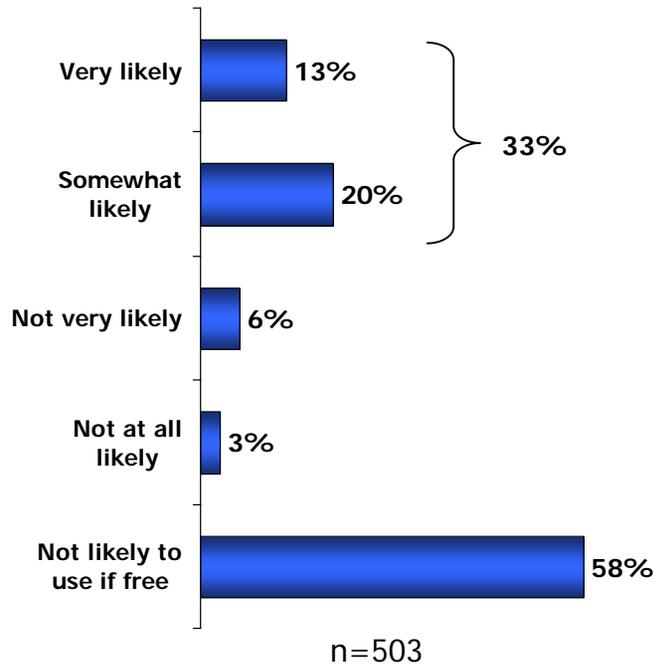
o Roughly two-in-five say they would be very or somewhat likely to use a free public bicycle service if offered at no charge; one-fifth would be “very” likely to use it.

Likelihood to Use Public Bicycle Service at a Cost of \$1 per Hour

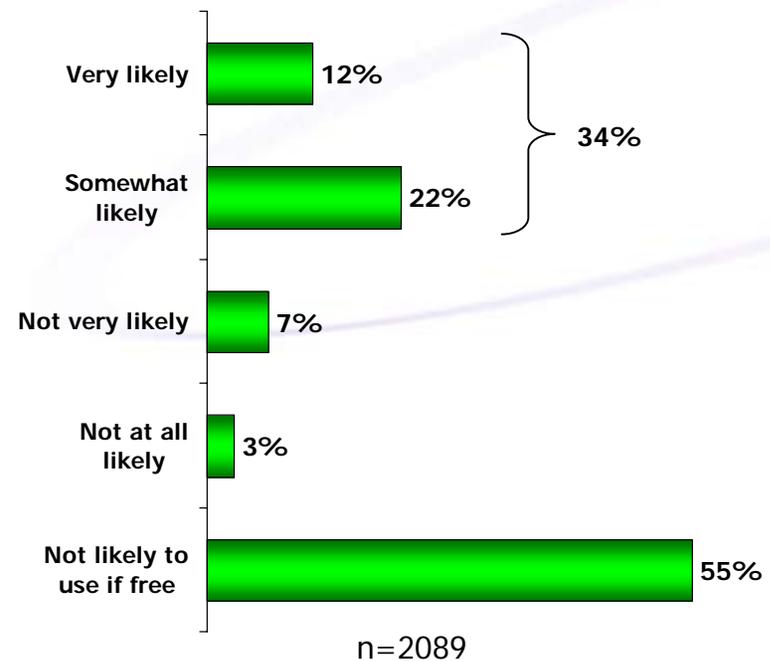


Q3. If this new public bicycle service were available to the public to use at a cost of about \$1 per hour, how likely would you be to use it at least once a month?

Synovate Telephone Survey



TransLink Listens Web Panel Survey



o At a cost of \$1 per hour, one-third would be very or somewhat likely to use the service; thirteen percent would be “very” likely to use it.

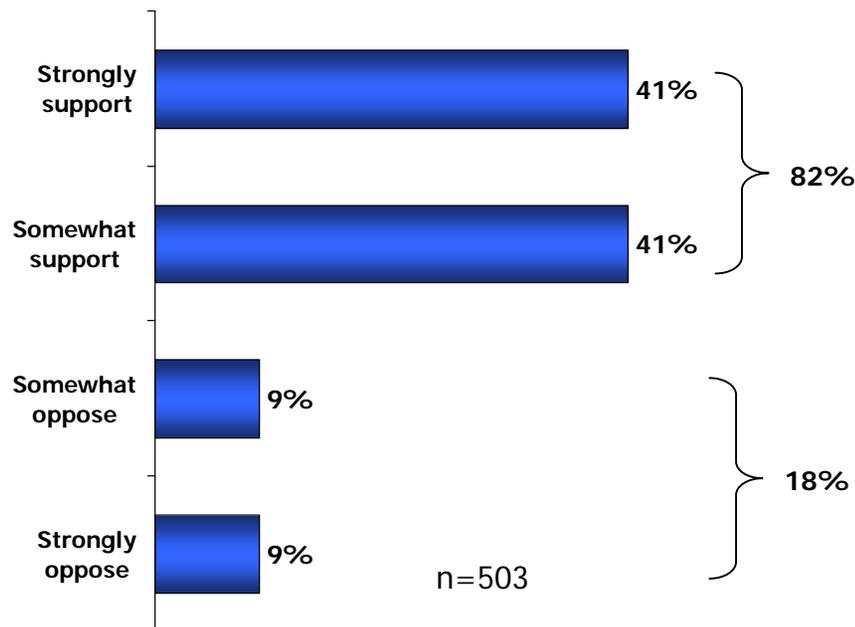
Level of Support for Using Some of the Existing Road Space for Public Bicycles



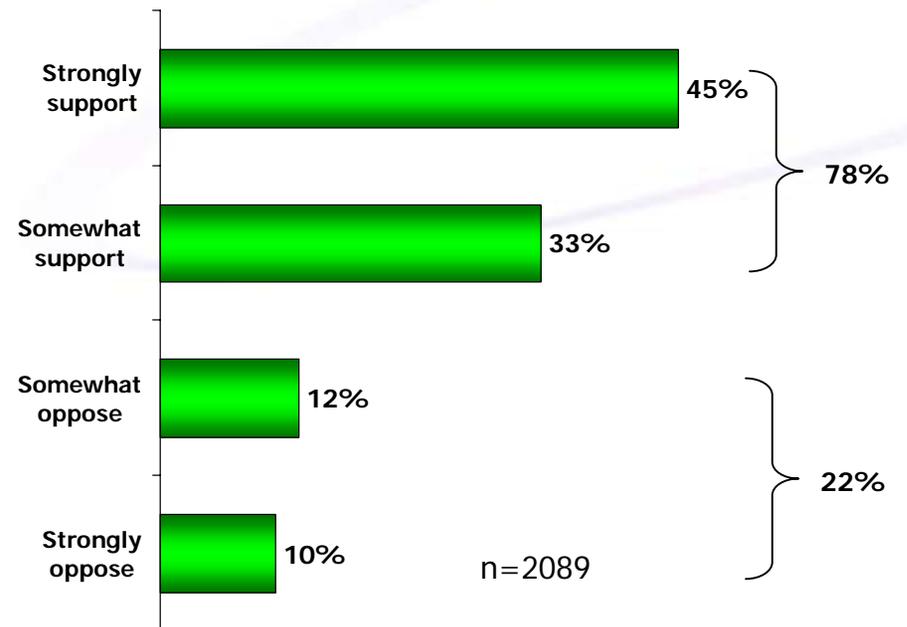
Public bicycle services are intended for cyclists of all ability levels - some of these cyclists may not be comfortable riding in mixed traffic on major streets but would be comfortable riding on clearly marked or separated bike lanes. A public bicycle service will require space for both locating bicycle docking stations and accommodating bicycle traffic.

Q4. Do you strongly support, somewhat support, somewhat oppose or strongly oppose using some of the existing road space to accommodate a public bicycle service?

Synovate Telephone Survey



TransLink Listens Web Panel Survey



o The large majority (approx. 80 percent) supports using some of the existing road space to accommodate a public bicycle service.

Reasons for Supporting Using Some of the Existing Road Space



TransLink Listens Panelists' Verbatim Comments

Q4A. Why do you say that you support using some of the existing road space to accommodate a public bicycle service?
 [Note: Question only asked on Web Panel Survey]

"I think it will promote more bicycle use by more than just users of the public bicycle service. It would encourage more people to commute and ride casually on their own bikes. It would make it safer to ride bikes. I think it's important to promote this low impact, low expense method of transportation."

"...If there were dedicated cycling lanes and paths it would keep these cyclists out of traffic (and therefore offset some of the issues faced from loss of road space) while increasing the safety of both cyclist and motorists..."

"... It is a way to incorporate exercise into your day. It is also a environmentally friendly option."

"If more people could have access to a cheap bicycle for commuting or getting around town, there would be less road traffic."

"To reduce pollution and specifically green house gases."

Reasons for support are that it is "environmentally friendly", "promotes health/fitness", "reduces traffic congestion" and "improves cycling safety".

"We must continue to look at and be receptive to sustainable methods of transportation. It will definitely come at a cost to the single occupant vehicle, but it has to be that way - we have to find ways to make the SOV's less attractive. Taking away some of their "space" is one of many ways to do it."

"We are a city that needs to GO GREEN. This idea I believe would be very popular for those who need to take a bus for only a short distance."

"I have been to Amsterdam and seen how the road is segregated to be shared by streetcars (LRT), bikes and cars. It works."

"Sustainable transportation needs to have the necessary infrastructure supported."

Reasons for **Opposing** Using Some of the Existing Road Space



TransLink Listens Panelists' Verbatim Comments

Q4A. Why do you say that you oppose using some of the existing road space to accommodate a public bicycle service?
 [Note: Question only asked on Web Panel Survey]

"Not enough road space as it is now. If you take up existing road space, there will be more congestion and longer delays for the cars."

"I live downtown, FULL OF GRIDLOCK already, INCLUDING locking up bus space (I cite Robson Street during rush hour as a prime example). There is already a great network of streets downtown that are bike-friendly. ... it is such a bother getting over Burrard too... I really oppose keeping a lane for bikes on our few deficient bridges that exist."

"...Dollars spent need to be in proportion to number of bike riders. Making it easier to ride your bike in the city would be nice but it won't make more people ride their bikes to work, just for pleasure."

"...This would just make buses even slower and cause longer delays."

Reasons for opposition include concerns about "traffic congestion/delays", "inequitable/wasteful use of taxes", "that it won't reduce car use", and "safety of cyclists and drivers".

"... the bikes are a great idea for those whose lives revolve around the city centers, the majority of those who would be inclined to use such a service are the ones that are already walking or have their own bikes to ride."

"I think it's a waste of taxpayers' dollars. I highly doubt that the majority of people are going to use this service, and it seems like the money could serve a better purpose."

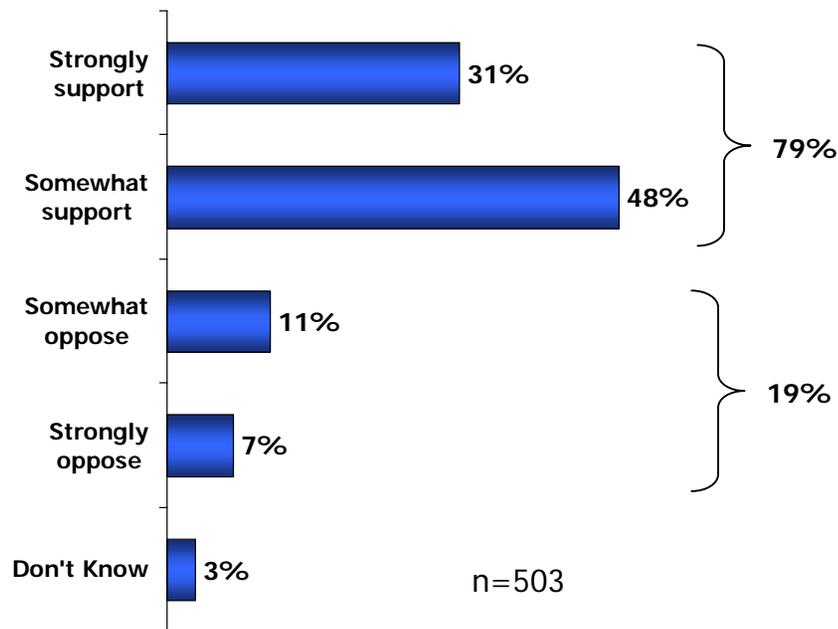
"I do not feel that this is viable anywhere but downtown cores in the Lower Mainland. As traffic and parking are already at a ridiculous premium in this area, there is no reasonable space that could be taken. The only way I see the possibility of this happening is if, during road widening, special bicycle lanes are built in. Prime opportunity for this was lost on Cambie for example. It should have been built in at that time... "

Level of Support for Increased Outdoor Advertising to Fund Public Bicycles

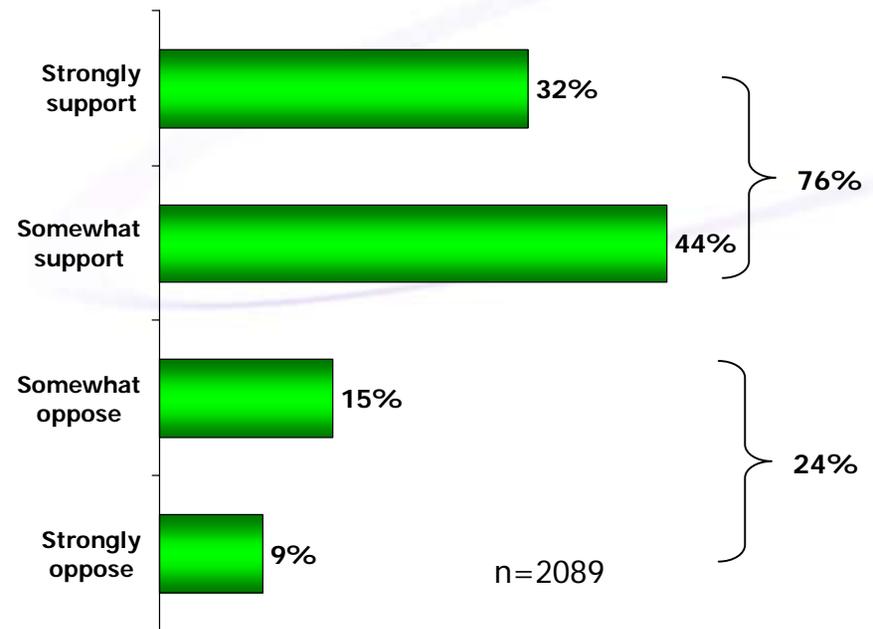


Q5. Additional funding sources, like advertising or sponsorship, are used by many existing public bicycle services. In general, do you strongly support, somewhat support, somewhat oppose or strongly oppose increased outdoor advertising to help finance a public bicycle service in the Lower Mainland?

Synovate Telephone Survey



TransLink Listens Web Panel Survey



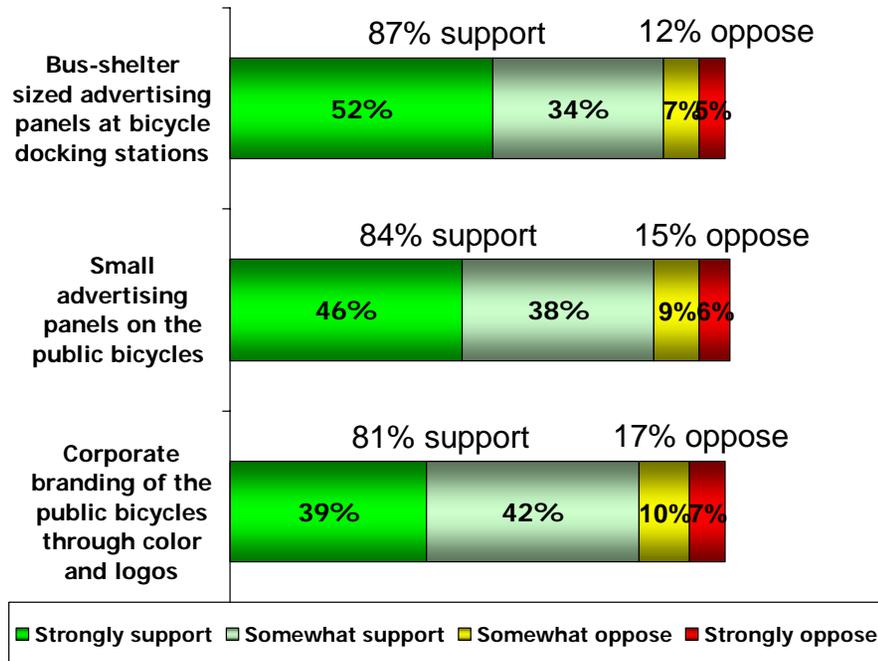
o Most (approx. 80 percent) support increased outdoor advertising to help finance a public bicycle service.

Level of Support for Three Types of Outdoor Advertising



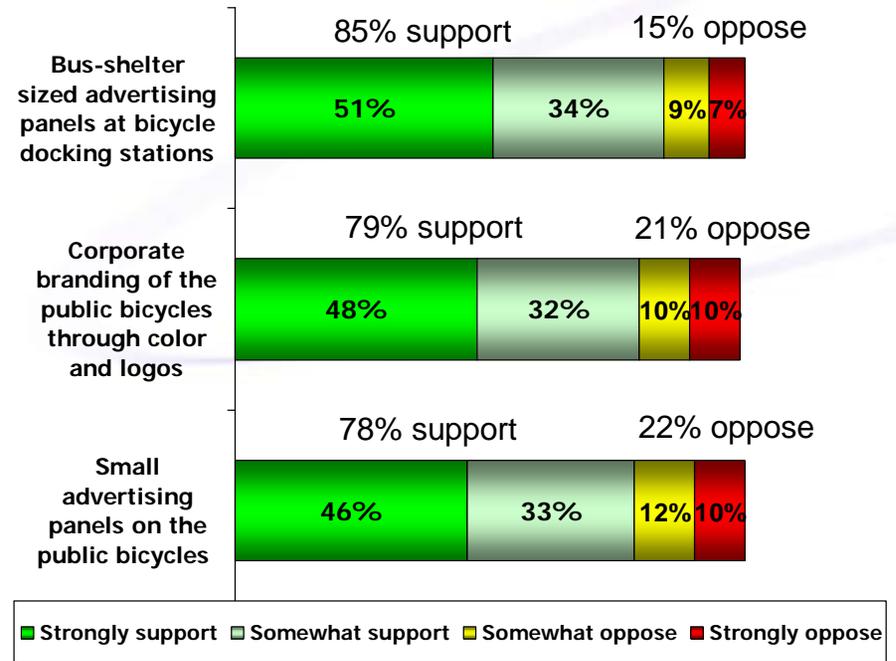
Q6. Do you strongly support, somewhat support, somewhat oppose or strongly oppose [INSERT A-C; RANDOMIZE ORDER] to help finance a public bicycle service?

Synovate Telephone Survey



n=503

TransLink Listens Web Panel Survey



n=2089

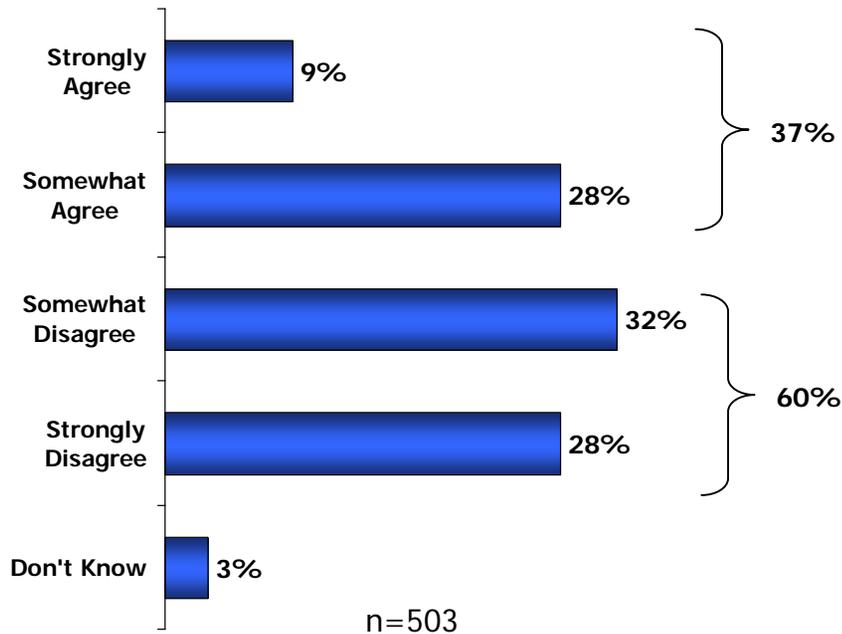
o A strong majority (roughly 80 percent or higher) supports each of the proposed forms of outdoor advertising. Having advertising panels at docking stations received the highest support; support was marginally lower for “advertising on the bikes” and “corporate branding of the bikes”. 16

Are TransLink and Municipal Governments Doing Enough?

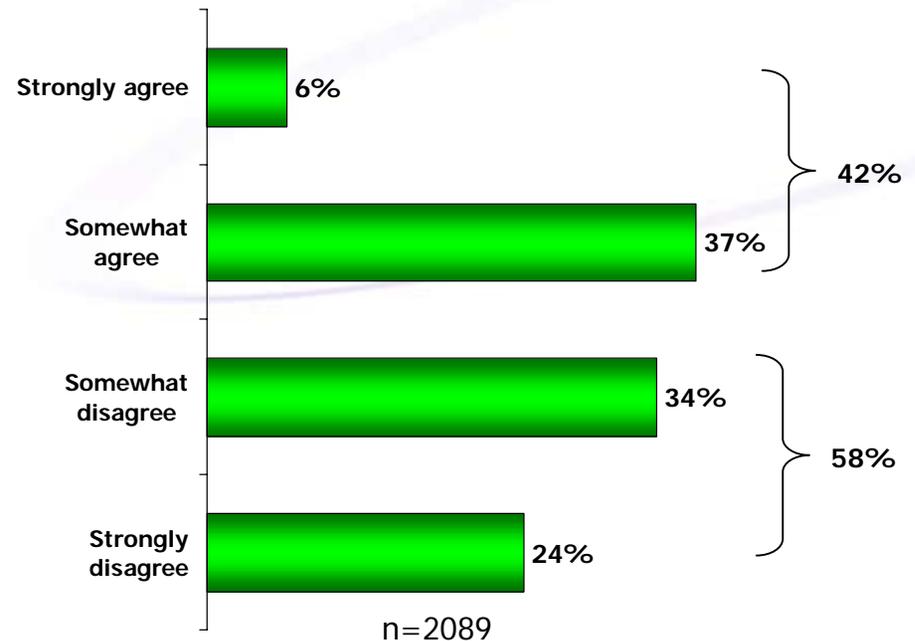


Q7. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree that TransLink and municipal governments are doing enough to create new sustainable transportation choices for residents in the Lower Mainland such as walking, cycling and public transit?

Synovate Telephone Survey



TransLink Listens Web Panel Survey



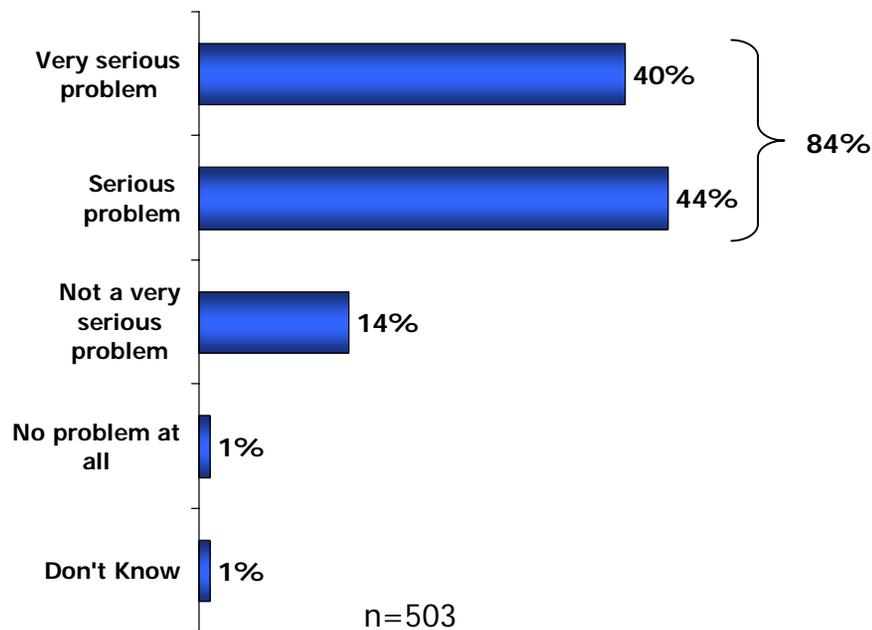
o Most (approx. 60%) disagree that TransLink and municipal governments are doing enough to create new sustainable transportation choices for Lower Mainland residents.

Are Vehicle Emissions a Problem?

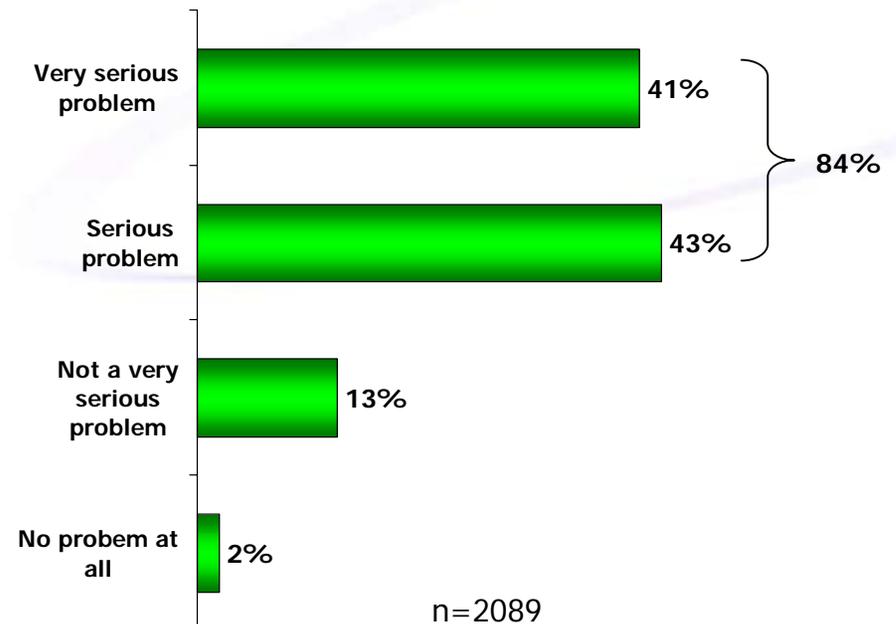


Q8. Thinking about vehicle emissions in the Lower Mainland, would you say this is a very serious problem, a serious problem, not a very serious problem or no problem at all?

Synovate Telephone Survey



TransLink Listens Web Panel Survey



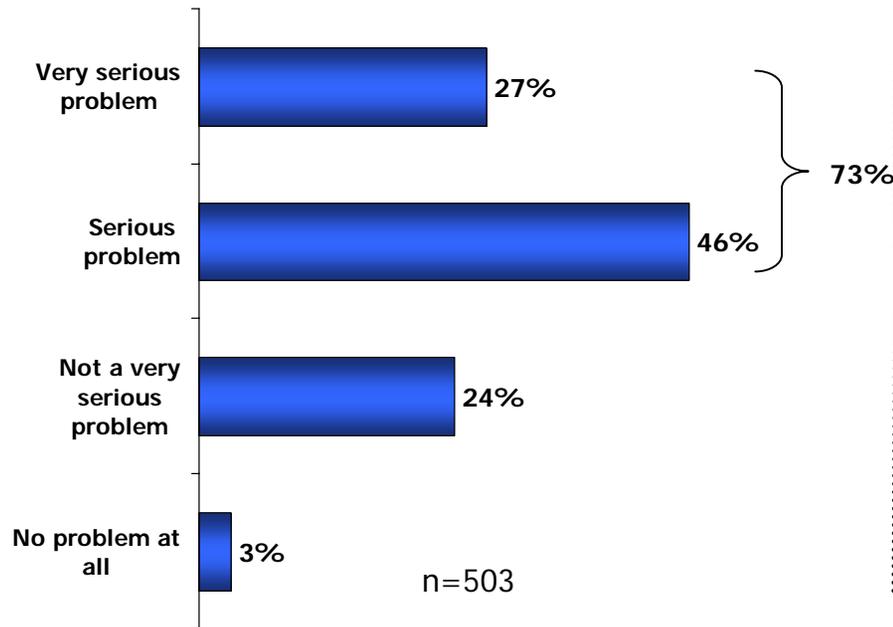
o Most (over 80 percent) consider vehicle emissions to be a serious or very serious problem in the Lower Mainland.

Is Traffic Congestion a Problem?

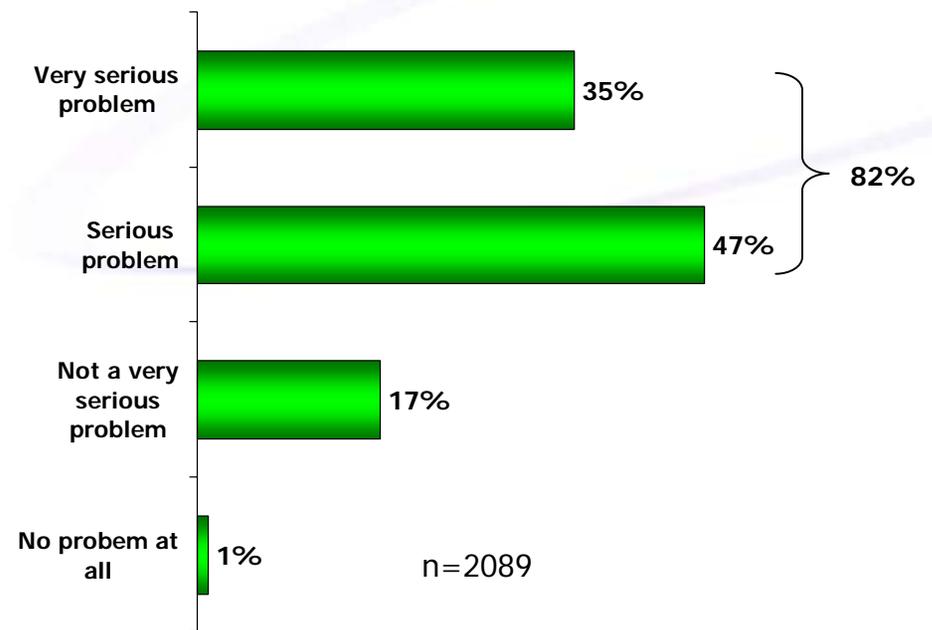


Q9. How would you describe traffic congestion in an average week in your local municipality? Would you say it is a very serious problem, a serious problem, not a very serious problem or no problem at all?

Synovate Telephone Survey



TransLink Listens Web Panel Survey



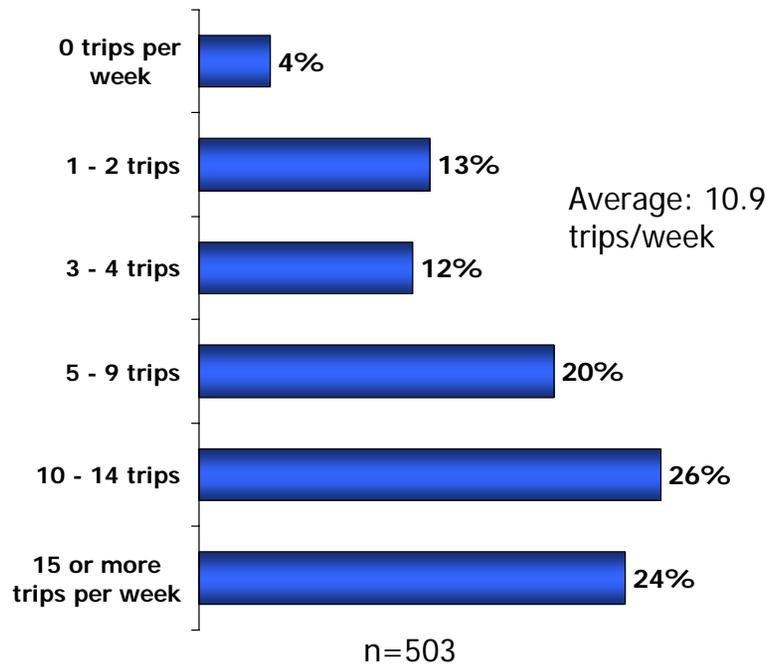
o Most (over 70 percent) consider traffic congestion to be a problem in their local municipality.

Incidence of Short Trips

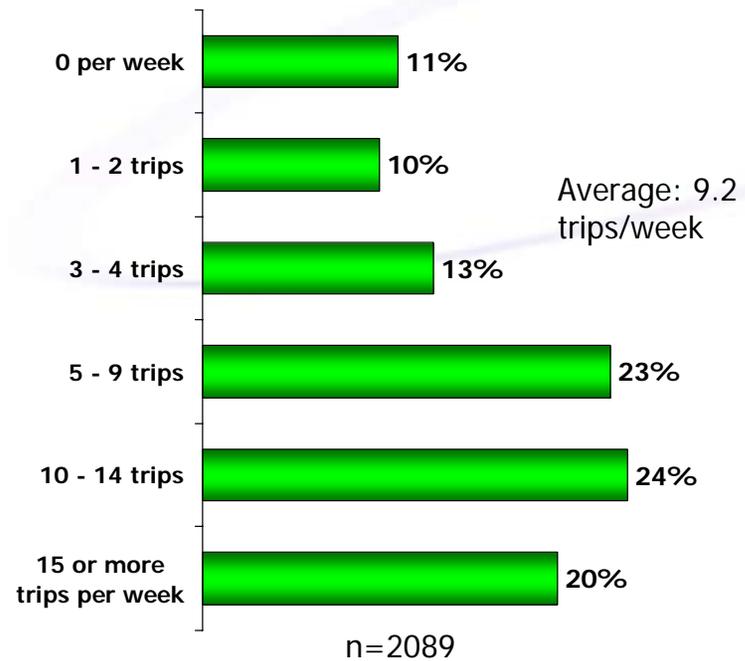


Q10. How many one-way trips of less than 5 kilometers (“about 3 miles”) do you make on a weekly basis? A one-way trip is a trip to a single destination. For example, a trip to a store would be “one” one-way trip, and the trip back would be a second one-way trip.

Synovate Telephone Survey



TransLink Listens Web Panel Survey



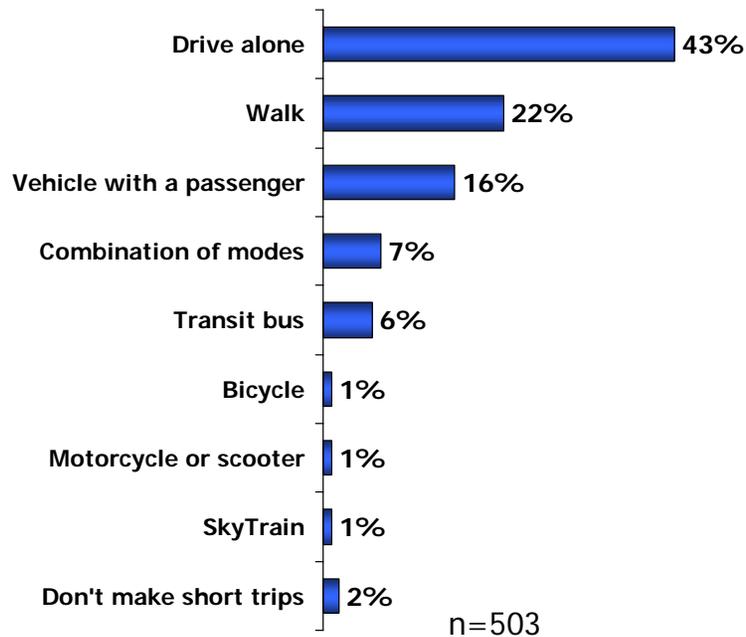
o On average, the general public makes 10.9 short trips per week. The comparable average among panelists was slightly less (9.2 trips/week).

Mode of Transportation for Short Trips

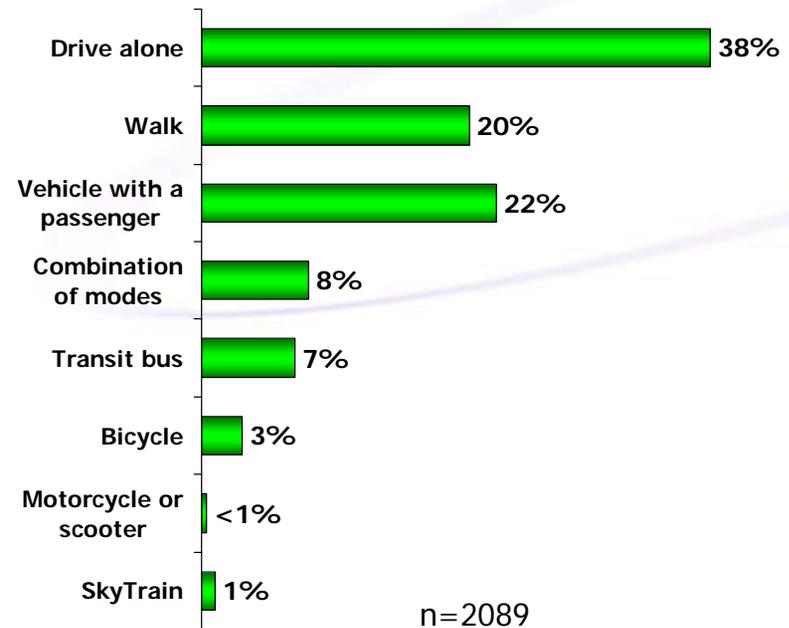


Q11. What mode of transportation do you use most often for short trips – less than 5 km?

Synovate Telephone Survey



TransLink Listens Web Panel Survey



o For trips of less than 5 km, driving alone is the most common mode of transport (by roughly two-in-five), followed by walking, and riding in a vehicle with a passenger. Among the general public, only one percent of short trips are made by bicycle; among panelists 3 percent make short trips by bike.

Demographics



Synovate Telephone Survey

| | Total Sample | Those likely to use public bike service @ \$1/hr |
|------------------------------|--------------|--|
| | (n=503) % | (n=145) % |
| Gender: | | |
| Male | 49 | 57 ↑ |
| Female | 51 | 43 ↓ |
| Age: | | |
| 16-34 years | 32 | 49 ↑ |
| 35-54 years | 39 | 36 |
| 55 and over | 29 | 14 ↓ |
| Region: | | |
| City of Vancouver | 27 | 37 ↑ |
| Surrey/White Rock/N. Delta | 22 | 25 |
| Tri-Cities/North East Sector | 14 | 9 ↓ |
| Burnaby/New Westminster | 12 | 8 |
| Richmond/S. Delta | 11 | 9 |
| North Shore | 8 | 9 |
| Langley/Aldergrove | 6 | 3 ↓ |

TransLink Listens Web Panel Survey

| | Total Sample | Those likely to use public bike service @ \$1/hr |
|-------------------------------------|---------------|--|
| | (n=2089) % | (n=837) % |
| Gender: | | |
| Male | 49 | 52 ↑ |
| Female | 51 | 48 ↓ |
| Age: | | |
| 16-34 years | 32 | 45 ↑ |
| 35-54 years | 39 | 40 |
| 55 and over | 29 | 15 ↓ |
| Region: | | |
| City of Vancouver | 27 | 37 ↑ |
| Surrey/White Rock/N. Delta | 22 | 18 ↓ |
| Tri-Cities/North East Sector | 14 | 11 |
| Burnaby/New Westminister | 12 | 13 |
| Richmond/S. Delta | 11 | 9 |
| North Shore | 8 | 8 |
| Langley/Aldergrove | 6 | 3 ↓ |
| Own/Have Access to a Bicycle | | |
| Yes | 57 | 66 ↑ |

- o The data were weighted by region, gender and age (and for the panel - main mode of travel) to ensure the final sample was an accurate reflection of GVRD residents aged 16+.

Note: Statistically significant differences compared to those *unlikely* to use the service shown with arrows.

Appendix

TransLink Listens E-mail Invitation



What do you think about this possible new sustainable transportation option?

Please complete this 5 - 8 minute survey by **January 23, 2008** and your name will be entered into a prize draw to win one of two prizes.

With each of the draws you will be given a choice of either:

- A one-month three-zone fare card (\$136 value), or
- \$100 cash

[Click here to start survey:](#)

Thank you!

The TransLink Listens Panel Team.

Questionnaire



Public Bicycle System Survey – Jan. 2008

Q1. To begin, Have you heard or read anything about automated public bicycle services in the past twelve months? These services go by several different names including shared-use bicycles and city bicycles.

Yes No Don't Know

Automated self-serve public bicycle services are available in major cities around the world, including Paris, Lyon, Barcelona and Munich. These systems consist of a network of high-quality theft-resistant bicycles parked at docking stations located every few blocks. Using an access card or credit card, it is quick and easy to access a bicycle which can then be returned to any other docking station in the network. As a result, one-way trips are possible.

Q2. If this new public bicycle service were available to the public to use at no charge, how likely would you be to use it at least once a month?

Very likely Somewhat likely Not very likely Not at all likely

Q3. If this new public bicycle service were available to the public to use at a cost of about \$1 per hour, how likely would you be to use it at least once a month?

Very likely Somewhat likely Not very likely Not at all likely

Public bicycle services are intended for cyclists of all ability levels - some of these cyclists may not be comfortable riding in mixed traffic on major streets but would be comfortable riding on clearly marked or separated bike lanes. A public bicycle service will require space for both locating bicycle docking stations and accommodating bicycle traffic.

Q4. Do you strongly support, somewhat support, somewhat oppose or strongly oppose using some of the existing road space to accommodate a public bicycle service?

Strongly support Strongly oppose
Somewhat support Somewhat oppose

[Q4A. ASKED ON WEB-PANEL ONLY]

Q4A. Why do you say that you [INSERT AS APPROPRIATE support / oppose] using some of the existing road space to accommodate a public bicycle service?

Q5. Additional funding sources, like advertising or sponsorship, are used by many existing public bicycle services.

In general, do you strongly support, somewhat support, somewhat oppose or strongly oppose increased outdoor advertising to help finance a public bicycle service in the Lower Mainland?

Strongly support Strongly oppose
Somewhat support Somewhat oppose



Questionnaire (cont'd)

Q6. Next, I'm going to describe three types of outdoor advertising that could help finance a public bicycle service and for each one I would like you to tell me your level of support or opposition.

Do you strongly support, somewhat support, somewhat oppose or strongly oppose [INSERT A-C; RANDOMIZE ORDER] to help finance a public bicycle service?

- a. Small advertising panels on the public bicycles
- b. Bus-shelter sized advertising panels at bicycle docking stations
- c. Corporate branding of the public bicycles through color and logos

Q7. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree that TransLink and municipal governments are doing enough to create new sustainable transportation choices for residents in the Lower Mainland such as walking, cycling and public transit?

| | |
|----------------|-------------------|
| Strongly agree | Strongly disagree |
| Somewhat agree | Somewhat disagree |

Q8. Thinking about vehicle emissions in the Lower Mainland, would you say this is a very serious problem, a serious problem, not a very serious problem or no problem at all?

| | |
|----------------------|----------------------------|
| Very serious problem | Not a very serious problem |
| Serious problem | No problem at all |

Q9. How would you describe traffic congestion in an average week in your local municipality? Would you say it is a very serious problem, a serious problem, not a very serious problem or no problem at all?

| | |
|----------------------|----------------------------|
| Very serious problem | Not a very serious problem |
| Serious problem | No problem at all |

Q10. How many one-way trips of less than 5 kilometers (3 miles) do you make in an average week in your local municipality?

Q11. What mode of transportation do you use most often for short trips?

| | |
|--------------------------------|----------------------|
| Drive alone | Bicycle |
| Private vehicle with passenger | Walk |
| Motorcycle/scooter | SeaBus |
| Transit bus | SkyTrain |
| West Coast Express | Taxi |
| Other transit | Combination of modes |
| Other specify | <input type="text"/> |

Q12. Do you own, or have access to a bicycle to use on a regular basis? [ASKED ON WEB PANEL ONLY]

| | | |
|-----|----|------------|
| Yes | No | Don't Know |
|-----|----|------------|