

Transit Fare Review Survey

Prepared for: TransLink

August 12, 2016

Contact:

Adam DiPaula | 604 566 8912
ad@sensisresearch.com

Alana Kendrick | 604 566 8914
ak@sensisresearch.com



03

**Background,
Objectives,
Methodology**



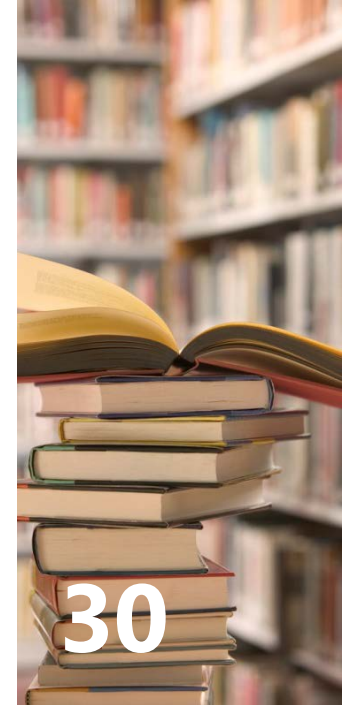
07

**Executive
Summary**



11

**Summary of
Findings**



30

Appendix

contents



Background & Objectives

Methodology

The Transit Fare Review Survey measures Metro Vancouver residents' satisfaction with the current transit fare structure as well as the appeal of alternatives to the current structure. The survey is the first of four phases that make up TransLink's Transit Fare Review process.

The survey addresses the following:

- Satisfaction with the way transit fares are currently determined and reasons for these satisfaction levels
- Attitudes toward specific components of the fare structure – e.g., the zone system, 90-minute transfer window – and the extent to which residents would like changes to these components
- Support for a range of factors that could impact the way transit fares are determined
- The top priorities that residents want TransLink to take into account when making changes to the transit fare structure, products and programs
- Sources of information about the Transit Fare Review
- Current transit system use – e.g., frequency, mode use, zones travelled through, fare products used

Survey Design & Data Collection

- The survey was designed by TransLink and administered to members of TransLink’s online member panel. The survey dates and participation statistics are outlined below.

| Survey Dates | 2016 |
|---------------------|--------|
| Survey soft launch | May 11 |
| Survey full launch | May 24 |
| Reminder email sent | June 1 |
| Survey closed | June 5 |

| Participation Statistics | # |
|------------------------------------|-------|
| Total Metro Vancouver invites sent | 4,690 |
| Members completing the survey | 1,485 |
| Completion rate | 32% |

- The dataset was weighted to reflect the Metro Vancouver population with respect to region, age, gender and main mode of transportation.
- NOTE: TransLink Listens panelists’ responses may differ from random general population surveying, even with weighting, because of their deeper engagement with transit and transportation.

Survey Introduction

- Panelists were provided with the following information before answering the survey questions:

Introduction. *Over the last 30 years, the way we determine fares – including our zone structure and our fare products – hasn't changed much. It's time to take a fresh look at our fare system. Before you start, make sure you've read more about the project on our Transit Fare Review page.*

Transit Fare System Components. Panelists were also presented with an explanation of the six core components that currently determine 'how much you pay to use transit in Metro Vancouver.'

- **Distance travelled** – Customers pay more for each zone boundary they cross. All bus and HandyDART travel temporarily operates under one-zone; SkyTrain and SeaBus under three zones; and West Coast Express under its own five-zone structure.
- **Transit service** – There is one set of prices for Bus, SkyTrain, SeaBus and HandyDART. The West Coast Express is a higher-priced premium service.
- **Time of travel** – Customers travelling outside of peak times, after 6:30pm on weekdays and all day on weekends and holidays, only pay a one-zone fare on SkyTrain and SeaBus.
- **Fare product** – Customers can choose to purchase a single-ride ticket or use their Compass Card to get a discount by using Stored Value or purchasing a Day Pass or a Monthly Pass.
- **Customer group** – Adults pay full price. Youth, seniors and people with disabilities that impact their ability to travel independently are eligible to travel at a reduced price. Children under age four travel for free when accompanied by an adult.
- **Journey time** – Customers can make multiple trips across Bus, SkyTrain, and SeaBus on a single fare for up to 90 minutes and 120 minutes with a West Coast Express fare.



Executive Summary

Metro Vancouver residents support TransLink taking a fresh look at the fare system

In the introduction to the Transit Fare Review survey, TransLink informed panelists that “it’s time to take a fresh look at our fare system.” These survey results clearly illustrate that residents strongly support TransLink taking this fresh look.

Only one-quarter of Metro Vancouver residents agree that the current zone-based fare structure works well – 6-in-10 disagree. Further, in all sub-regions the majority of residents disagree that the current zone-based fare structure works well. While support for the current zone-based structure is higher among those whose main mode of transportation is transit (32% agree that the current structure works well) and among those who use the transit system at least once a week (34% agree) it is far from substantial.

The survey results point to a number of things for TransLink to consider as it decides if, or how, to change the way fares are structured.

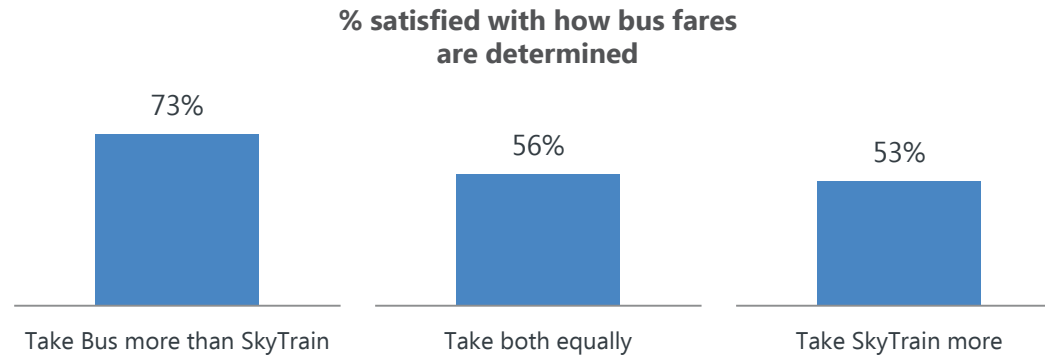
The relatively high level of satisfaction with the current fare structure for Bus is the result of a “temporary” policy

By a substantial margin, residents are the most satisfied with the current fare structure for Bus. However, satisfaction is driven largely by the 1-zone fare for all Bus travel, which took effect in October 2015. Two-thirds of residents who are satisfied with the current fare structure for Bus cite the 1-zone fare as the reason. TransLink has indicated that the 1-zone for Bus is a temporary change that will remain in effect until further notice. However, TransLink should be mindful that moving back to the previous fare structure for Bus will likely have a very negative impact on satisfaction with Bus fares.

The higher satisfaction that the 1-zone fare for all Bus travel has created may be having unintended negative consequences

The higher levels of satisfaction that the 1-zone fare for all Bus travel has created among residents may come at the expense of the satisfaction of those who regularly rely on other modes.

As shown in the graph, those who use the SkyTrain more than the Bus, and those who use both the Bus and SkyTrain equally are much less satisfied with the current fare structure for Bus than those who use the Bus more than SkyTrain. This suggests that residents who have to devote a larger share of their transit costs to transit modes not included in the 1-zone fare policy are less likely view the 1-zone fare structure for Bus as reasonable.



The current zone boundaries are the main source of dissatisfaction with the current fare structures for all modes

The 1-zone fare structure for Bus has likely contributed to the critical view that Metro Vancouver residents have of the current zone-based fare structure – and made the link between fares and distance more salient than it has been previously. The most common source of dissatisfaction with current fares for Bus, SkyTrain and SeaBus are the zone boundaries. Residents who are dissatisfied with the current fare structure for bus view the zone structure as unfair because it is not distance-based. Those dissatisfied with the current fare structure for SkyTrain consider short trips across zone boundaries to be “expensive” and consider the zone boundaries “unfair”. Those dissatisfied with the current fare structure for SeaBus don’t think they should pay a 2-zone fare for their trip.

There are two basic views regarding how to modify the fare structure

The results showed that there are two views regarding how to address the perceived inequities of the current zone-based fare structure.

The prevailing view is that fares should be distance-based, but that the current zone-based fare structure does not do a good enough job calibrating fares with distance travelled. A strong majority of Metro Vancouver residents (70%) agree that the system should be distance-based – and this is the top priority that residents want TransLink to take into account when making changes to the fare structure.

However, only 29% of these residents agree that the current zone-based structure works well. This means that only 20% of all Metro Vancouver residents view the current zone-based structure as doing a good job of calibrating fares with distance travelled.

The other view regarding how to address the perceived inequities of the current zone-based system – far less prevalent but strongly held by about 20% of residents – is that fares should not be based on distance travelled. Rather, fares should be the same for all trips. The intensity of this minority opinion is reflected in the fact that, while the large majority of residents did not select it as a priority, “making fares the same for all trips” was among the priorities that was selected most as the first priority that TransLink should take into account when making changes to the transit fare structure.

Metro Vancouver residents are seeking greater simplicity in the fare structure

“Making it easier to understand and predict how much you’ll pay” is among the top priorities that residents want TransLink to take into account when making changes to the fare structure – on par with “making fares lower for people with less ability to pay” and “making fares lower at less busy times”. Explaining how the current fare structure works is clearly challenging, as illustrated in this flow chart on the TransLink website showing the fare riders will pay under a variety of scenarios: <http://www.translink.ca/en/Fares-and-Passes/One-Zone-Bus-Travel.aspx>. For example, a rider new to the SeaBus might reasonably conclude that they could pay a 1-zone fare when using SeaBus during peak periods. However, SeaBus is never a 1-zone fare during peak periods.

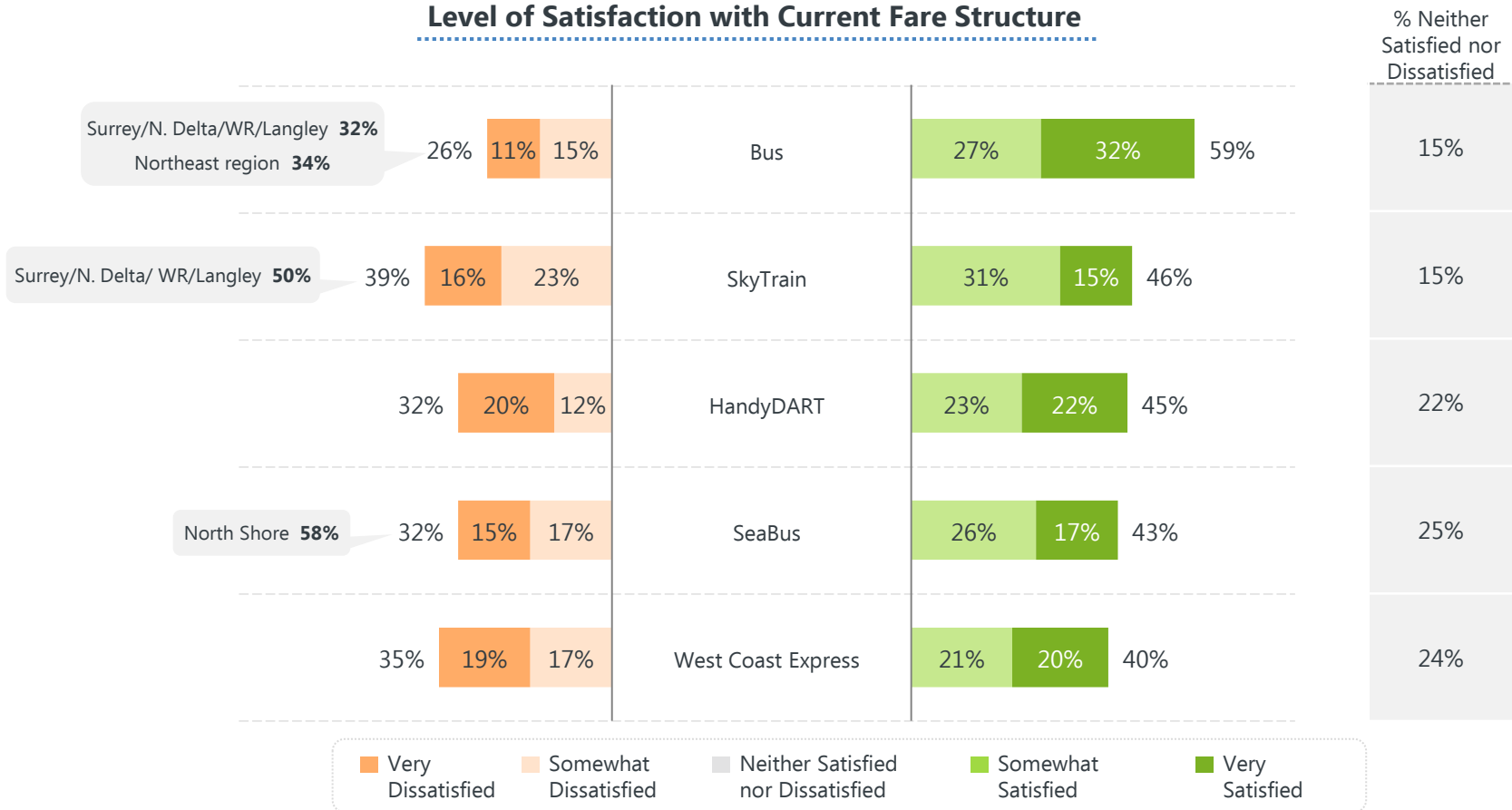


Summary of Findings

Satisfaction with Current Way Fares are Determined

- Metro Vancouver residents are most satisfied with the fare structure for Bus, which charges riders a one-zone fare regardless of how many zones they cross. Those living in Surrey/N. Delta/WR/Langley and the Northeast region are the least satisfied with the current fare structure for Bus. These residents are also the least-frequent users of the Bus, and Bus use frequency is tied to satisfaction – with the most frequent Bus riders being the most satisfied with the current fare structure for Bus. (Note that frequent Bus riders from these areas are just as satisfied with the current fare structure as frequent Bus riders living in other areas).
- Surrey/N. Delta/WR/Langley residents are the least satisfied with the current fare structure for SkyTrain. They are also the residents most likely to travel across three zones when using SkyTrain. North Shore residents are the group least satisfied with the current SeaBus fare – as SeaBus riders must pay for 2-zones during peak times.

Level of Satisfaction with Current Fare Structure

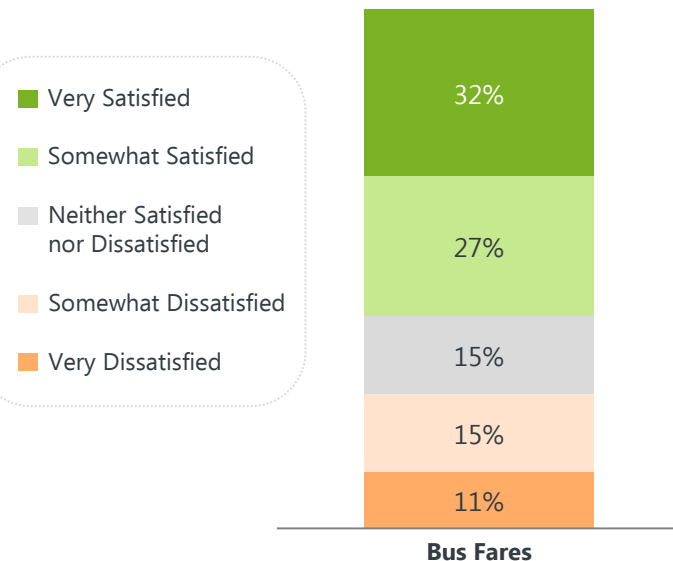


Base [among those using each service]: Bus (1,404); SkyTrain (1,425); SeaBus (846); West Coast Express (282); HandyDART (166)

Q1. For each of the transit services you use, how satisfied are you with the current way that fares are determined?

- Residents who are most satisfied with the current fare structure for Bus are the most likely to cite the 1-zone fare as the reason for their satisfaction.
- Residents cite both personal benefits of the 1-zone fare (“cheaper for me”) as well as presumptive benefits for all residents (“easier for everyone”, “more fair/reasonable”).
- There are two main sources of dissatisfaction with the current rate structure for Bus: the belief that the fares are still too expensive and the belief that fares should be based on distance travelled.
- Note, however, that residents who view the fare structure for Bus as unfair are not advocates of the current zone system. Only a relatively small percentage of these residents agree that the current zone-based system works well.

Level of Satisfaction with Current Fare Structure



Top Reasons for being Satisfied with Current Fare Structure for **Bus***

(unaided mentions among those satisfied)

| | |
|--|-----|
| Base | 874 |
| Pay 1-zone fare for all zones (general) | 32% |
| 1-zone fare is easier for everyone | 12% |
| 1-zone fare is cheaper for me/more economical | 11% |
| 1-zone fare is more fair/reasonable | 11% |
| Like the Compass Card System/no issues with current system | 4% |
| Satisfied, but unfair – travel should be distance-based | 10% |
| Satisfied, but too expensive – fares should be cheaper | 5% |

Top Reasons for being Dissatisfied with Current Fare Structure for **Bus***

(unaided mentions among those dissatisfied)

| | |
|--|-----|
| Base | 343 |
| Fares should be distance-based | 26% |
| Too expensive/fares should be cheaper | 17% |
| Not economical for TransLink/fares should increase so taxpayers pay less | 7% |
| Zone boundaries are unfair/should be removed | 7% |
| 90-minute transfer time is too short | 6% |
| Unfair that only bus is 1 zone | 6% |
| Costs too much/cheaper to drive | 6% |
| Should be 1 zone for SkyTrain/SeaBus too | 5% |
| Buses are infrequent – not in service | 4% |
| If you don't have a Compass Card you are paying twice/ Compass Card between Bus and SkyTrain needs to be better integrated | 4% |

*Note: only major mentions are shown. Percentages may add to more than 100% given that a respondent can offer multiple reasons.

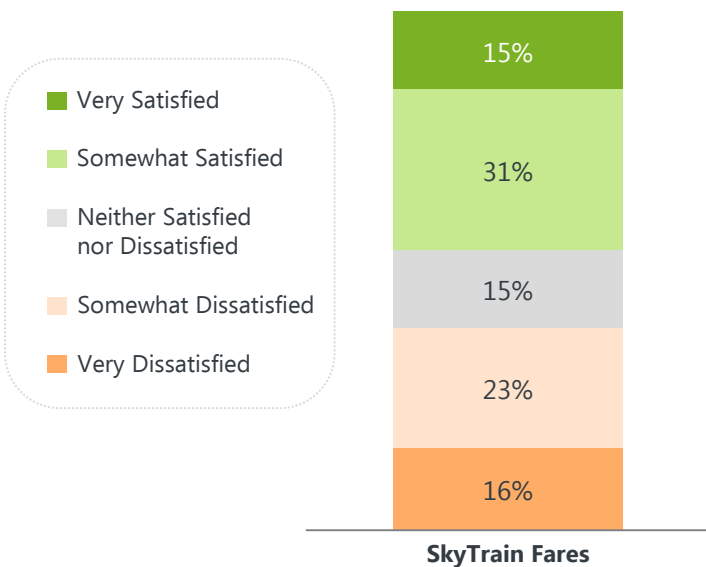
Base [among those using bus services]: 1,404

Q1. For each of the transit services you use, how satisfied are you with the current way that fares are determined?

Q1A_BUS. Why do you say you are [Q1 ANSWER] with the current way fares are determined for bus? Please be as specific as possible.

- The reasons residents give in response to their satisfaction ratings point to a weakening of satisfaction levels due to the current zone-based system. Notable percentages of residents (highlighted in darker grey) gave reasons suggesting that they *would be more satisfied* if the zone-based structure was changed (e.g., short trips across zone boundaries are expensive; the zone boundaries are unfair).
- The sources of dissatisfaction with the current fare structure for SkyTrain highlight two attitudes regarding the zone system. One is that the current zone boundaries are unfair and should be removed. 7-in-10 SkyTrain riders who use the SkyTrain at least once a week also use the Bus at least once a week (28% of all riders). The difference between the two modes in what riders pay for cross-zone travel may heighten the sense of unfairness of a zone-based fare system among those who use SkyTrain.
- The second attitude is that the current zone-based fare structure does not do a good job of taking into account the actual distance travelled when determining fares. A common view among those dissatisfied with the current fare structure is that “short trips across zone boundaries are expensive.” Also, a notable percentage of dissatisfied residents believe “fares should be distance-based.”

Level of Satisfaction with Current Fare Structure



Top Reasons for being Satisfied with Current Fare Structure for SkyTrain*

(unaided mentions among those satisfied)

| | |
|---|-----|
| Base | 696 |
| The fare is reasonable/ fair | 20% |
| Zones make sense/are distance-based | 11% |
| Good service (fast, frequent, reliable) | 6% |
| Like the Compass Card/no issues with the current system | 6% |
| It works/It's simple/I am used to it | 4% |
| Satisfied, but short trips across zone boundaries are expensive | 17% |
| Satisfied, but zone boundaries are not fair/don't make sense | 12% |
| Satisfied, but too expensive/should be cheaper | 12% |
| Satisfied, but fares should be distance-based | 11% |

Top Reasons for being Dissatisfied with Current Fare Structure for SkyTrain*

(unaided mentions among those dissatisfied)

| | |
|--|-----|
| Base | 520 |
| Zone boundaries are not fair/don't make sense | 35% |
| Short trips across zone boundaries are expensive | 30% |
| Too expensive/should be cheaper | 18% |
| Fares should be distance-based | 16% |
| Bus tickets cannot be transferred to SkyTrain | 6% |
| 90-minute transfer time is too short | 5% |
| The airport surcharge is unfair | 5% |

*Note: only major mentions are shown. Percentages may add to more than 100% given that a respondent can offer multiple reasons.

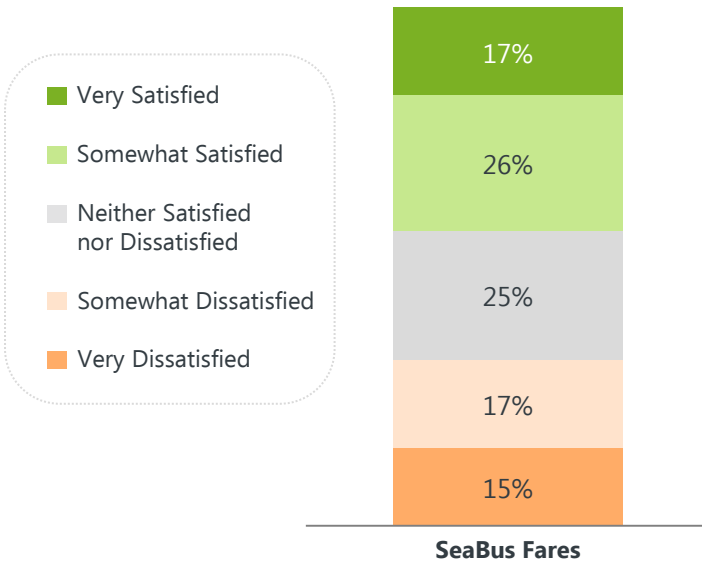
Base [among those using SkyTrain services]: 1,425

Q1. For each of the transit services you use, how satisfied are you with the current way that fares are determined?

Q1A_SKY. Why do you say you are [Q1 ANSWER] with the current way fares are determined for SkyTrain? Please be as specific as possible.

- The main reason that residents are satisfied with the current fare structure for SeaBus is that they consider the fare to be reasonable/fair. However, perceptions of fairness are tied to use. Those who use the SeaBus at least once a month express higher levels of dissatisfaction (45%) with the current fare structure than those who use it less frequently (29% dissatisfied).
- The most common source of dissatisfaction with the current fare structure for SeaBus is the 2-zone fare. This is most commonly expressed among residents of the North Shore.

Level of Satisfaction with Current Fare Structure



Top Reasons for being Satisfied with Current Fare Structure for **SeaBus*** (unaided mentions among those satisfied)

| | |
|---|-----|
| Base | 398 |
| The fare is reasonable/fair | 30% |
| I like the Compass Card/no issues with the system | 8% |
| Service is convenient | 7% |
| Easy to calculate fare | 5% |
| Satisfied, but too expensive/should be cheaper | 12% |
| Satisfied, but should not be 2 zones | 9% |

Top Reasons for being Dissatisfied with Current Fare Structure for **SeaBus*** (unaided mentions among those dissatisfied)

| | |
|---|-----|
| Base | 246 |
| Should not be 2 zones | 32% |
| Too expensive/should be cheaper for such a short trip | 24% |
| Transit should all be 1 zone | 14% |
| Fares should be distance-based | 11% |
| Unfair now that busses are all 1 zone | 10% |

*Note: only major mentions are shown. Percentages may add to more than 100% given that a respondent can offer multiple reasons.

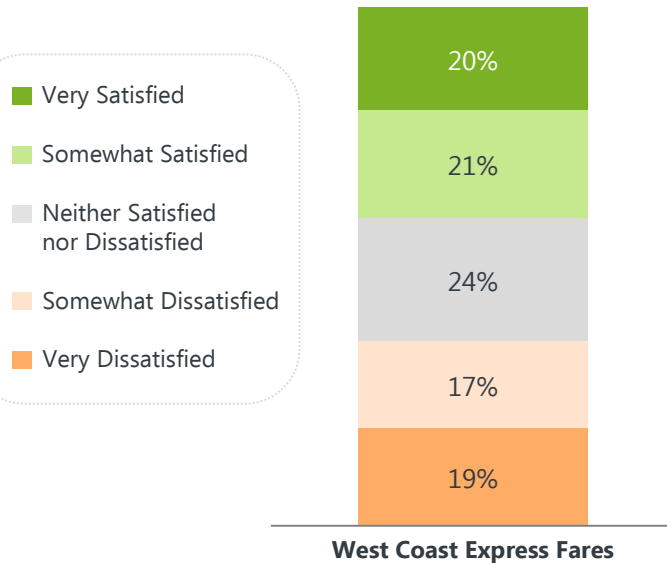
Base [among those using SkyBus services]: 846

Q1. For each of the transit services you use, how satisfied are you with the current way that fares are determined?

Q1A_SEA. Why do you say you are [Q1 ANSWER] with the current way fares are determined for SeaBus? Please be as specific as possible.

- Along with SkyTrain, the West Coast Express elicits the highest degree of ambivalence regarding the rate structure – with the percentages of those who are dissatisfied and those who are satisfied being almost equal.
- Those who are satisfied with the current fare structure for West Coast Express view the distance-based fare as reasonable. Those who are dissatisfied consider the fare too expensive.

Level of Satisfaction with Current Fare Structure



Top Reasons for being Satisfied with Current Fare Structure for **WCE*** (unaided mentions among those satisfied)

| | |
|--|-----|
| Base | 124 |
| Fares are distance-based | 25% |
| The fare is reasonable/fair | 24% |
| Good service (general) | 10% |
| Affordable/cheaper than driving | 8% |
| Satisfied, but limited service/availability (i.e. doesn't run on weekends) | 8% |

Top Reasons for being Dissatisfied with Current Fare Structure for **WCE*** (unaided mentions among those dissatisfied)

| | |
|---|-----|
| Base | 98 |
| Too expensive/cheaper to drive | 47% |
| Transit should all be 1 zone | 15% |
| Limited service/availability (i.e. doesn't run on weekends) | 12% |
| Don't like distance-based fares | 9% |
| Fares should increase so taxpayers pay less | 8% |
| Dislike that yearly/weekly passes are cancelled | 4% |
| Delays/cancelled trains | 4% |

*Note: only major mentions are shown. Percentages may add to more than 100% given that a respondent can offer multiple reasons.

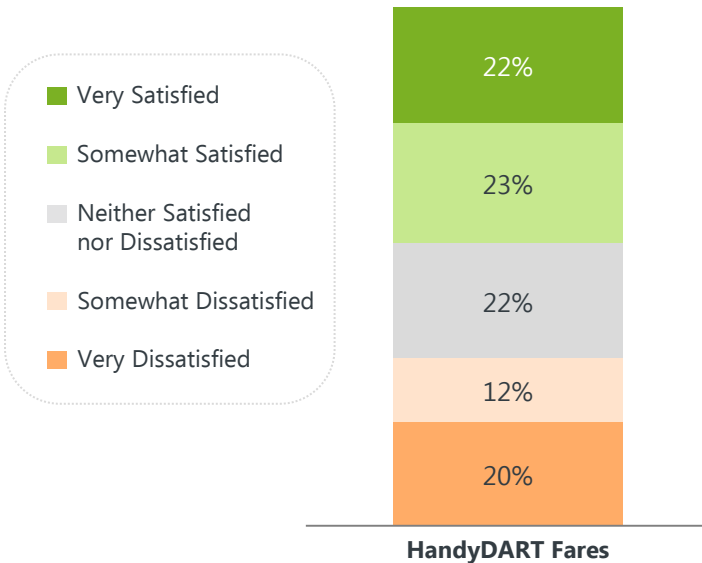
Base [among those using West Coast Express services]: 282

Q1. For each of the transit services you use, how satisfied are you with the current way that fares are determined?

Q1A_WCE. Why do you say you are [Q1 ANSWER] with the current way fares are determined for West Coast Express? Please be as specific as possible.

- The reasons that residents give for their level of satisfaction with the current fare structure for HandyDART suggest that expectations regarding the service vary across residents. The most common reasons that residents give for being satisfied with the service is that it is a good service and is reasonably priced. The most common reasons that residents give for being dissatisfied with the service is that the service is not good and that it is too expensive.

Level of Satisfaction with Current Fare Structure



Top Reasons for being Satisfied with Current Fare Structure for HandyDART* (unaided mentions among those satisfied)

| | |
|--|-----|
| Base | 73 |
| The fare is reasonable/fair | 21% |
| Good service (general) | 12% |
| 1 zone is easier/convenient for the disabled | 4% |
| Satisfied, but too expensive/fares should be cheaper | 12% |
| Satisfied, but should be free | 10% |
| Satisfied, but should improve service (hard to book, long waits, unreliable) | 9% |

Top Reasons for being Dissatisfied with Current Fare Structure for HandyDART* (unaided mentions among those dissatisfied)

| | |
|--|-----|
| Base | 51 |
| Improve service (hard to book, long waits, unreliable) | 28% |
| Too expensive/fares should be cheaper | 21% |
| Should be free | 12% |
| Fares should be increased | 7% |
| Confusing to use | 6% |

*Note: only major mentions are shown. Percentages may add to more than 100% given that a respondent can offer multiple reasons.

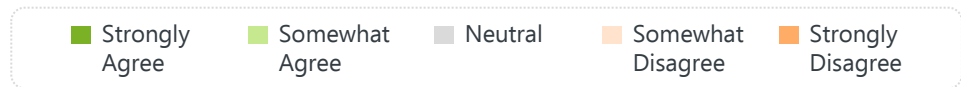
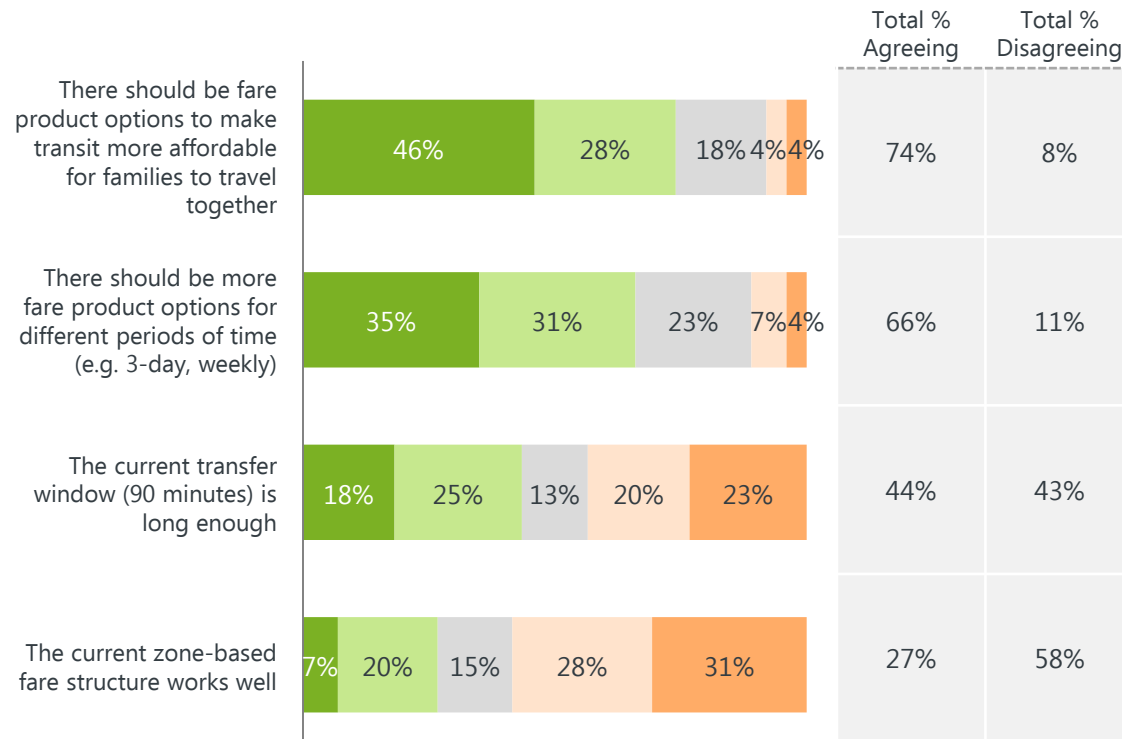
Base [among those using HandyDART services]: 166

Q1. For each of the transit services you use, how satisfied are you with the current way that fares are determined?

Q1A_HD. Why do you say you are [Q1 ANSWER] with the current way fares are determined for HandyDART? Please be as specific as possible.

- There is strong support for having fare product options that: a) make transit more affordable for families to travel together, and b) cover different periods of time.
- There is less support for the 90-minute transfer window – only 4-in-10 agree that the 90-minute window is long enough. Support for the current transfer window is lowest in Surrey/North Delta/WR/Langley and in the Northeast region, where over half (55%) don't believe that the current window is long enough.
- Support for the current 90-minute transfer window does increase with increased transit use. This is likely due to the fact that more frequent riders of transit tend to live in urban areas – which have greater service frequency.
- There is very little support for the current zone-based fare structure – only 27% of Metro Vancouver residents agree that the current structure works well, and the majority (58%) disagree.
- Support is weakest in the Northeast region and on the North Shore, where only 18% agree that the current system works well and two-thirds disagree.
- Occasional transit users – those who use the system either at least once a month or once a year – are the least supportive of the current system.

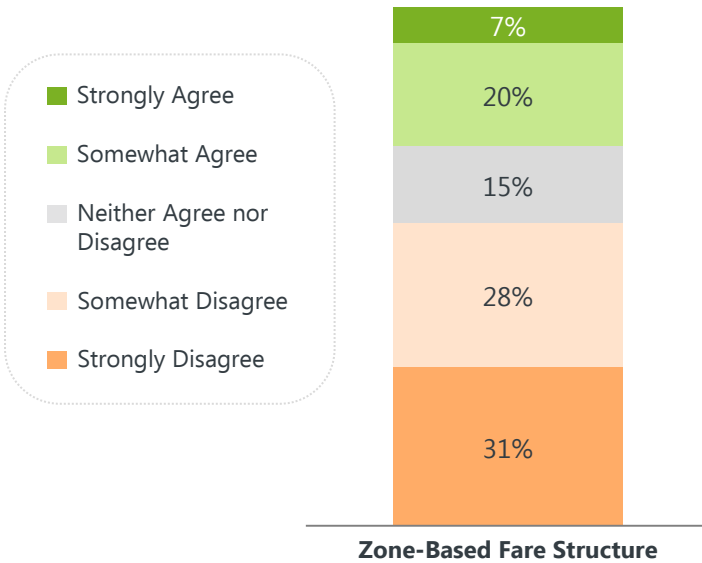
Support for Fare Structure Components



Reasons for Attitudes Towards the Current Zone Based Fare Structure SENTIS

- Those who believe that the current zone-based system works well find the system easy to understand and an effective system for tying fares to distance travelled.
- Those who believe that the current system doesn't work well feel the opposite – that current fares are not well-calibrated with the actual distance riders travel.

Agreement that Zone-Based Structure Works Well



Top Reasons for Agreeing Current Zone-Based System Works Well*

(unaided mentions among those agreeing)

| | |
|---|-----|
| Base | 416 |
| Fares are distance-based | 39% |
| It is simple/easy to understand | 22% |
| It works fine/no problems/it is familiar | 11% |
| It is fair (general) | 8% |
| 1-zone for all bus travel | 7% |
| The zones are well-defined | 7% |
| It is easy to estimate the cost of travel | 6% |

Top Reasons for Disagreeing Current Zone-Based System Works Well*

(unaided mentions among those disagreeing)

| | |
|--|-----|
| Base | 794 |
| Short trips across zone boundaries are expensive | 34% |
| The zone boundaries are ineffective | 30% |
| Fares don't reflect the distance travelled | 25% |
| Fares are unaffordable overall | 10% |
| It discourages people from using transit | 9% |
| Having different fare structures across different modes of transit | 8% |
| It's confusing/hard to understand | 7% |

*Note: only major mentions are shown. Percentages may add to more than 100% given that a respondent can offer multiple reasons.

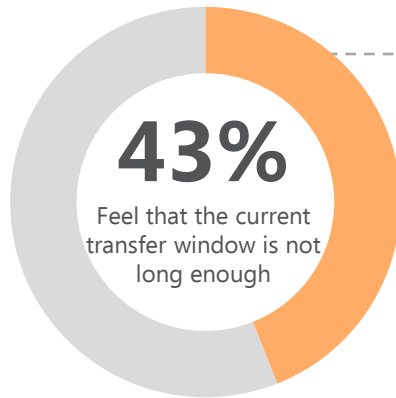
Base [among those offering an opinion]: 1,451

Q2. What is your level of agreement with each of the following statements? The current zone-based fare structure works well.

Q2A_1/2. Earlier you [agreed/disagreed] that the current zone-based structure works well. What aspects of the current zone based fare structure [don't] work well?

- Those who want a longer transfer window generally want the current 90-minute window to be extended by 30 minutes. Three-quarters of these residents would like the transfer window to be two hours.

Current 90-Minute Transfer Window



| Preferred Transfer Window Length (unaided mentions among those disagreeing) | |
|--|-----|
| Base | 537 |
| 1.5 hours to <2 hours | 3% |
| Exactly 2 hours | 76% |
| 2 hours+ to <3 hours | 5% |
| Exactly 3 hours | 11% |
| More than 3 hours | 5% |

*Note: only major mentions are shown.

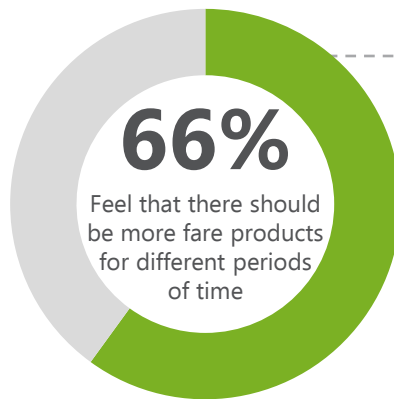
Base [among those offering an opinion]: 1,460

Q2. What is your level of agreement with each of the following statements? The current transfer window (90 minutes) is long enough.

Q2B. Earlier you disagreed that the current transfer window is long enough. How long should the transfer window be (in minutes)?

- Among those who agreed that there should be more fare product options covering different periods of time, the most common suggestions are that weekly passes be offered and that fares be set lower during off-peak times.

Product Options for Different Periods of Time



| New Fare Products Interested In (unaided mentions among wanting more fare product offerings) | |
|---|-----|
| Base | 899 |
| Weekly passes | 27% |
| Lower off-peak fares | 24% |
| 3-day passes | 15% |
| Weekend (2-day passes) | 11% |
| Tourist passes | 10% |
| Daily (24 hour) passes | 8% |
| Multi-day passes (general) | 7% |
| Work-week (5-day) passes | 5% |
| Annual passes | 2% |
| Monthly passes starting on any day of the month (30-day) | 2% |

*Note: only major mentions are shown.

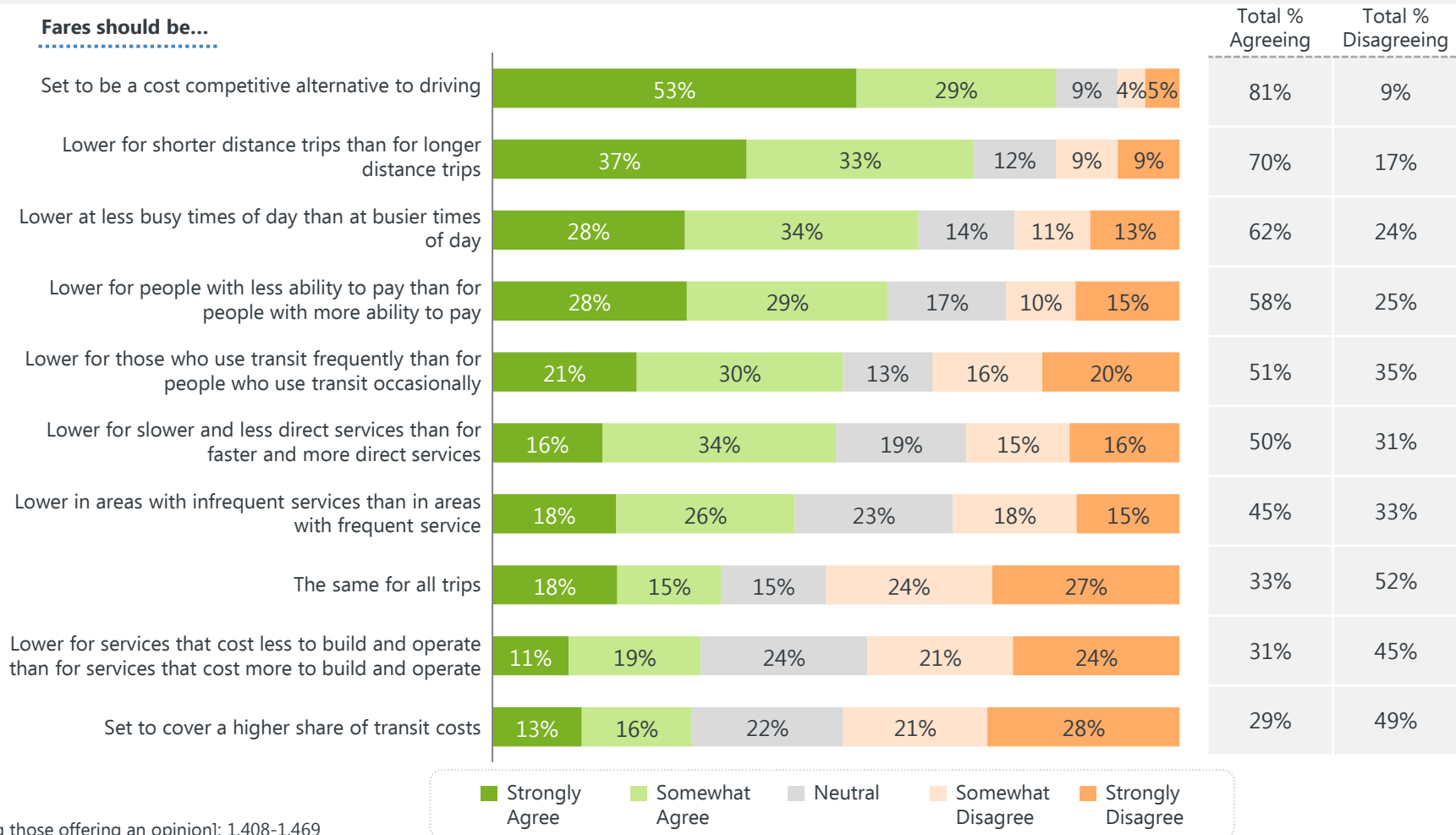
Base [among those offering an opinion]: 1,392

Q2. What is your level of agreement with each of the following statements? There should be more fare product options for different periods of time (e.g. 3-day, weekly).

Q2D. Earlier you agreed that there should be more fare product options for different periods of time. What new fare products are you interested in?

Attitudes Towards Possible Changes to Fare Structure

- Metro Vancouver residents rated their support for 10 factors that could be used to guide how transit fares are set. Residents expressed the strongest support for setting transit fares so that they are a cost-competitive alternative to driving. Residents expressed significantly less support for another factor that would presumably also encourage more frequent transit use – making fares lower for those who use transit frequently than for those who use transit occasionally. This factor received less support than making fares lower for shorter distance trips, making fares lower at less busy times, and making fares lower for people with less ability to pay.
- Making fares the same for all trips, making fares lower for services that cost less to build, and setting fares so that they cover a higher share of transit costs were three factors that generally do not resonate with Metro Vancouver residents.



Base [among those offering an opinion]: 1,408-1,469

Q2_PART2. What is your level of agreement with each of the following statements?

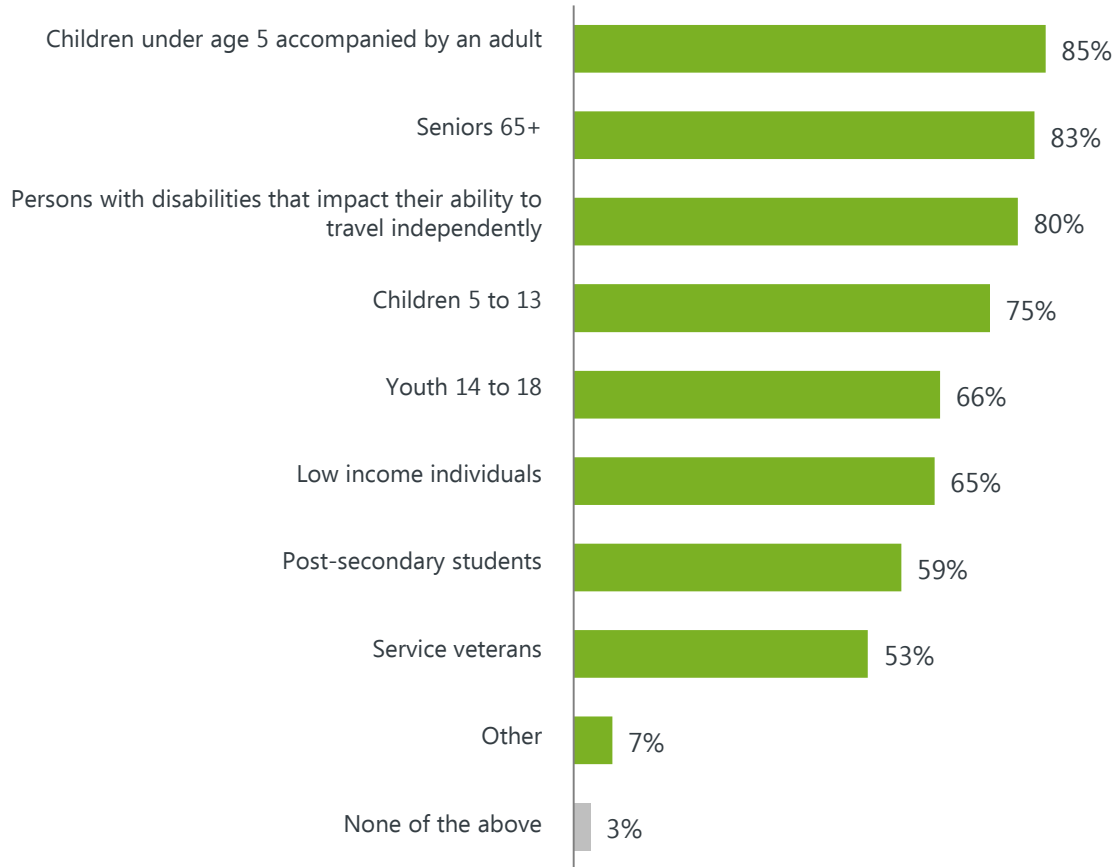
- Preferences for how the fare structure should be changed are, of course, influenced strongly by self-interest. The table on the following slide illustrates the magnitude in which demographics and other characteristics influence support for different options.
- Those less likely to have access to a vehicle (19-34 year olds) are most likely to agree that fares should be set to be a cost competitive alternative to driving.
- Those living in Surrey/N. Delta/WR/Langley and in the Northeast region are less likely to agree that fares should be lower for shorter distance trips.
- Those aged 65 and older (who are less likely to use transit during peak times) are most likely to agree that fares should be lower during less busy times of the day.
- Those with the lowest incomes are the most likely to agree that transit fares should be lower for people with less ability to pay.
- Those whose main mode of transportation is transit are most likely to agree that fares should be lower for those who use transit frequently.
- Those living on the North Shore are the least likely to agree that fares should be lower for slower, less direct services than for faster, more direct services – presumably because this would make it less likely that the SeaBus fare would become a 1-zone as opposed to a 2-zone fare.
- Those living in Surrey/N. Delta/WR/Langley and in the Northeast region are the most likely to agree that fares should be the same for all trips.

How Self-Interest Shapes Preferences

| Fares should be... | Total % Agreeing | % Agreeing Among Different Groups | | | | | | |
|---|------------------|-----------------------------------|------------------|-------------------|--------------------|-----------------------------|------------------|-------------|
| | | By Age | 19-34 | 35-44 | 45-54 | 55-64 | 65+ | |
| Set to be a cost competitive alternative to driving | 81% | By Age | 89% | 84% | 80% | 73% | 76% | |
| Lower for shorter distance trips than for longer distance trips | 70% | By Region | City of Van/ UEL | Burnaby/ New West | Richmond/ S. Delta | Surrey/N. Delta/WR/ Langley | Northeast Region | North Shore |
| | | | 75% | 74% | 83% | 64% | 60% | 68% |
| Lower at less busy times of day than at busier times of day | 62% | By Age | 19-34 | 35-44 | 45-54 | 55-64 | 65+ | |
| | | | 66% | 52% | 58% | 63% | 70% | |
| Lower for people with less ability to pay than for people with more ability to pay | 58% | By HH Income | <\$25K | \$25K to <\$45K | \$45K to <\$65K | \$65K to <\$85K | \$85K+ | |
| | | | 81% | 55% | 60% | 56% | 49% | |
| Lower for those who use transit frequently than for people who use transit occasionally | 51% | By Main Mode of Transport | SOV | Non-SOV | Transit | Other | | |
| | | | 47% | 44% | 65% | 54% | | |
| Lower for slower and less direct services than for faster and more direct services | 50% | By Region | City of Van/ UEL | Burnaby/ New West | Richmond/ S. Delta | Surrey/N. Delta/WR/ Langley | Northeast Region | North Shore |
| | | | 44% | 50% | 61% | 54% | 57% | 35% |
| The same for all trips | 33% | By Region | City of Van/ UEL | Burnaby/ New West | Richmond/ S. Delta | Surrey/N. Delta/WR/ Langley | Northeast Region | North Shore |
| | | | 32% | 31% | 19% | 40% | 40% | 31% |

Perceptions on Groups who Should be Eligible for Lower Fares

- Metro Vancouver residents express the strongest support for a fare structure that would make fares lower for children under 5, seniors older than 65, and persons with disabilities. At least two-thirds also agree that low income individuals and those under 18 should also be eligible for lower transit prices.



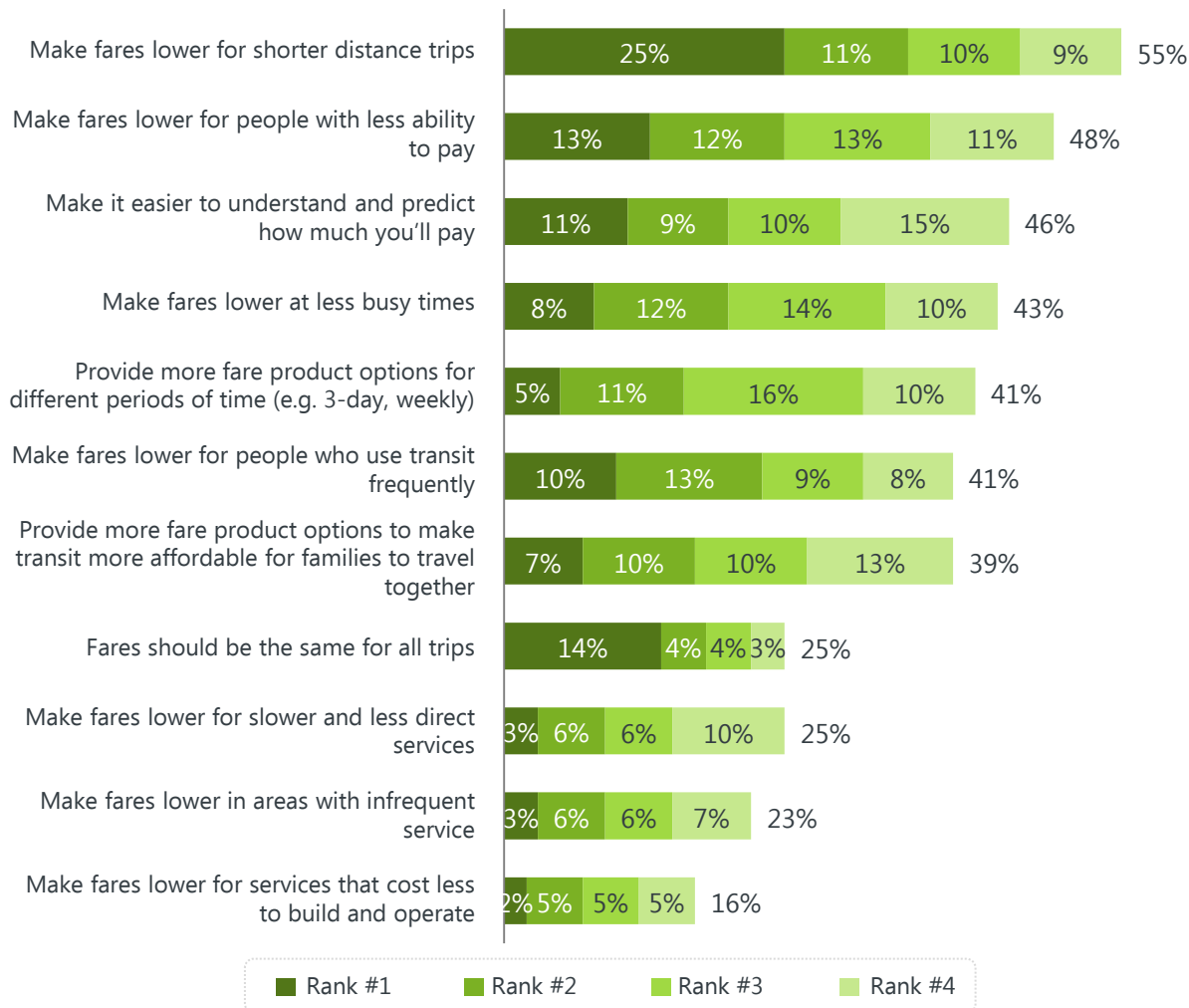
Base [all]: 1,485

Note: percentages add to more than 100% given that it is a multiple response question.

Q2J. Which groups, if any, do you think should be eligible for lower transit prices? Please select all that apply.

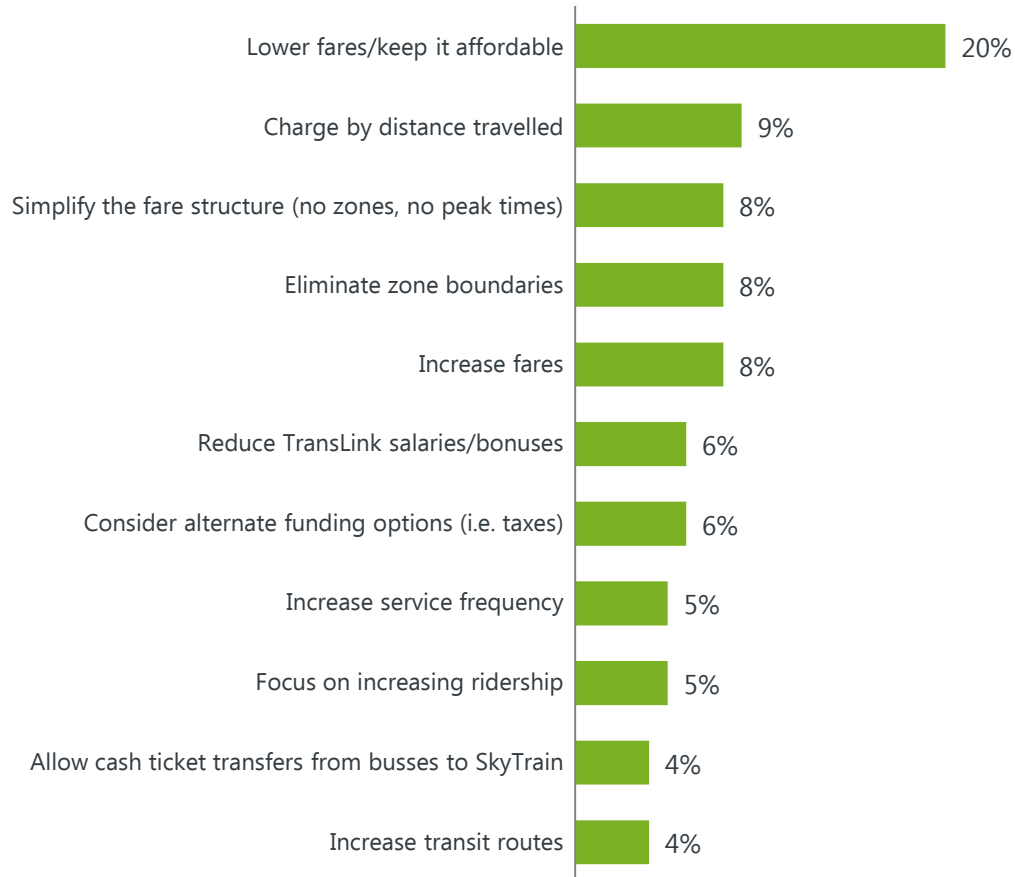
- Metro Vancouver residents were presented with 11 possible priorities and asked to rank the top four that they think TransLink should take into account when making changes to the transit fare structure, fare products and programs.
- Consistent with the relatively high level of support that they expressed for tying fares to distance travelled, residents ranked “making fares lower for shorter distance trips” as the top priority to guide changes to the fare structure – one-quarter of all residents ranked this as the top priority.
- Also consistent with their support for a system that ties fares to income and fares to system capacity, residents ranked “making fares lower for people with less ability to pay” and “making fares lower at less busy times” relatively high on their priority list.
- While a system that would charge the same fare for all trips is not among the top four priorities for three-quarters of Metro Vancouver residents, a notable percentage (14%) ranked this as their top priority. Those travelling 3 zones on their most frequent trip ranked this option higher (20% as their top priority).
- While residents expressed strong support for having fare products that make transit more affordable for families and for options for different periods of time, only 7% and 5%, respectively, ranked each of these as their top priority.

% Ranking in Top 4



Other Key Priorities for Fare Structure Changes

- While Metro Vancouver residents were asked for “other” key priorities that should be taken into account, many continued to comment on the current zone system and tying fares to distance travelled.



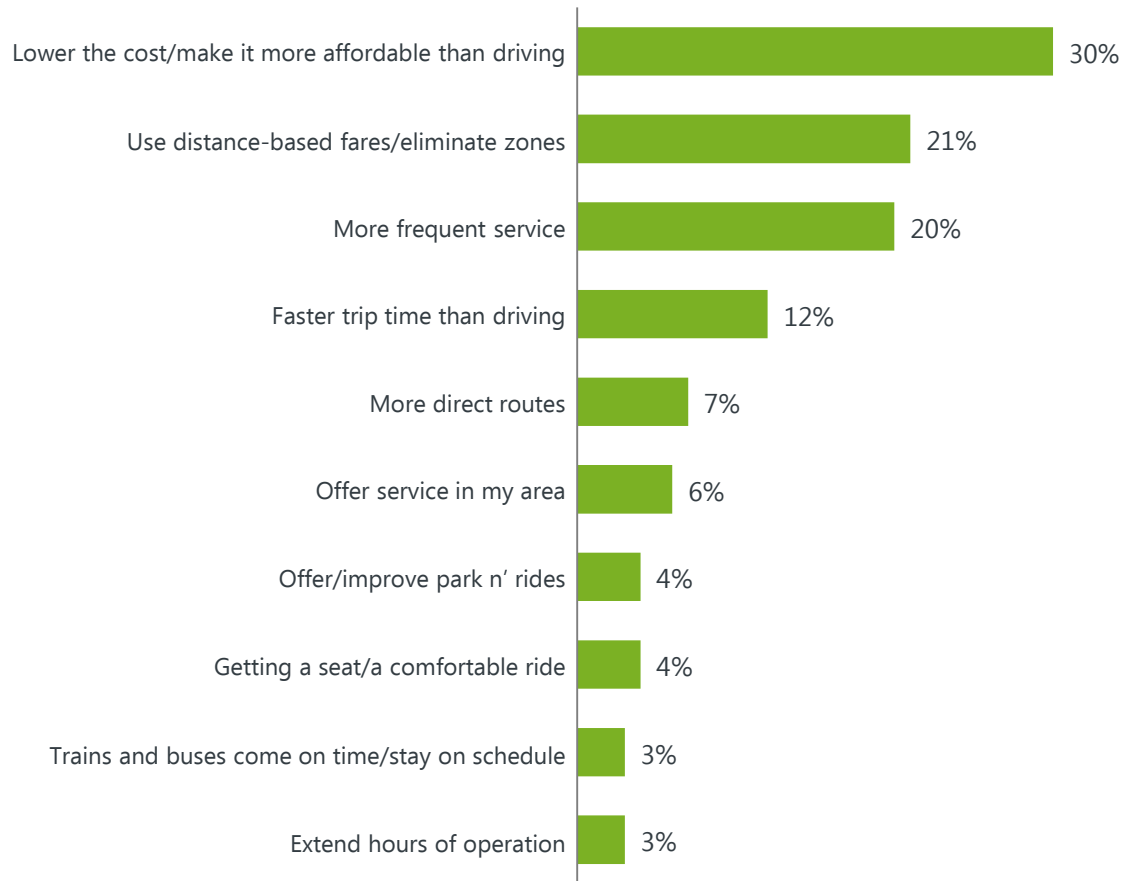
Base [among those offering an opinion]: 779

Note: only major mentions are shown. Percentages add to more than 100% given that it is a multiple response question.

Q4. What other key priorities should be taken into account as we consider changes to the current fare structure, products and programs? Please be as specific as possible.

Ways to Encourage More Transit Use

- According to Metro Vancouver residents whose primary mode of transport is driving, lowering the cost of transit is the top factor that would encourage them to use transit more often.
- Removing the zones and offering more frequent service are also important to 20% of this group of Metro Vancouver residents.



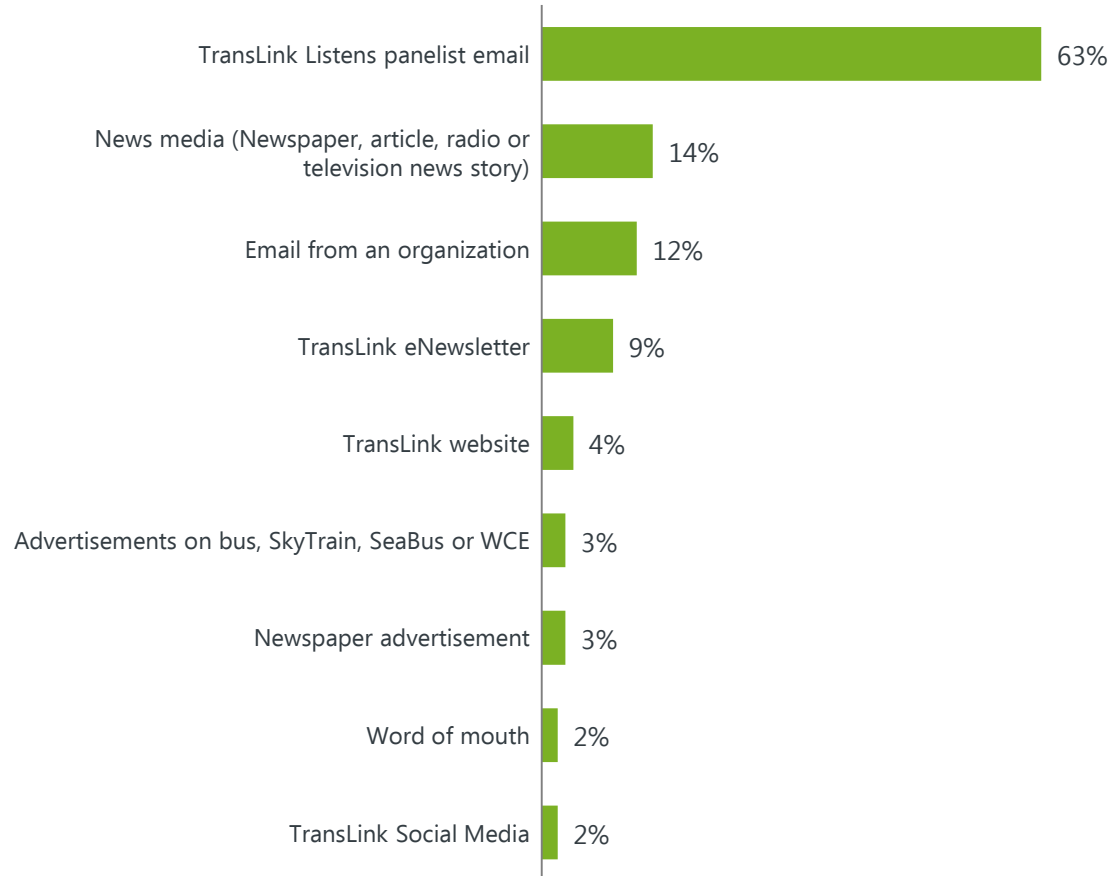
Base [among those who drive as their most frequent mode of transport & offered an opinion]: 624

Note: only major mentions are shown. Percentages add to more than 100% given that it is a multiple response question.

QD3a. Thinking about how transit fares are currently determined, what, if anything could be changed to encourage you to use transit, or use if more frequently? Please be as specific as possible.

Channel Heard About Transit Fare Review

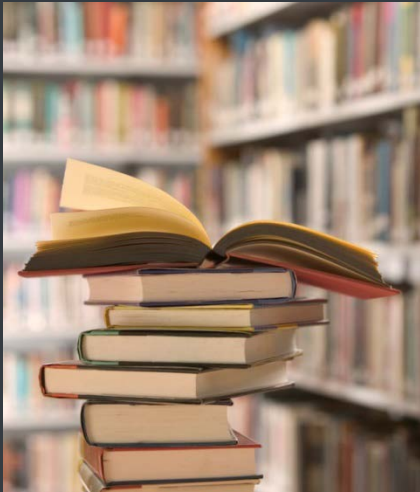
- Most TransLink Listens panelists heard about the Transit Fare Review from the email they received from the TransLink Listens panel.









Base [all]: 1,485

Note: only major mentions are shown. Percentages add to more than 100% given that it is a multiple response question.

QD5. How did you hear about the Transit Fare Review? Please select all that apply.



Appendix

| | Total |
|---|-------|
| | 1,485 |
| | % |
|  Gender | |
| Male | 48 |
| Female | 52 |
|  Age | |
| 19-34 | 28 |
| 35-44 | 17 |
| 45-54 | 22 |
| 55-64 | 16 |
| 65+ | 17 |
|  Education | |
| Some high school or less | 1 |
| Graduated high school | 7 |
| Vocational/ college/ technical | 25 |
| Some university | 15 |
| Graduated university | 52 |
|  Annual Household Income | |
| Less than \$45,000 | 22 |
| \$45,000 to less than \$75,000 | 22 |
| \$75,000 to less than \$95,000 | 10 |
| \$95,000 or more | 22 |
| Prefer not to say/Don't know | 24 |
|  Employment Status | |
| Employed full-time (30 or more hours per week) | 60 |
| Employed part-time (less than 30 hours per week) | 12 |
| Student | 8 |
| Not employed | 4 |
| Homemaker | 3 |
| Retired | 13 |
|  Sub-Region | |
| City of Vancouver | 29 |
| Burnaby/ New Westminster | 13 |
| South of Fraser | 37 |
| Northeast | 13 |
| North Shore | 8 |

| | Total |
|--|-------|
| | 1,485 |
| | % |
| Mode of Transportation | |
| Drive alone (single occupancy vehicle) | 55 |
| Travel in private vehicle with at least one other person | 14 |
| Bicycle | 4 |
| Walk | 5 |
| Take public transit | 21 |
| Other | 1 |
| Most Frequently Used Method of Payment | |
| Cash fare | 30 |
| Compass ticket | 22 |
| Stored value on Compass Card | 48 |
| DayPass | 8 |
| 1-Zone monthly pass | 9 |
| 2-Zone monthly pass | 5 |
| 3-Zone monthly pass | 3 |
| U-Pass BC | 6 |
| BC Bus Pass | 2 |
| Other/Don't know | 7 |
| Access To Car/Van/Truck | |
| Yes | 79 |
| No | 21 |
| Physical Disability | |
| Yes | 5 |
| No | 94 |
| Prefer not to say | 1 |



Mode of Transportation



Method of Payment



Access to Car/Van/Truck



Physical Disability



Frequency of Transit Usage

| | Total |
|---------------------------------|-------|
| | 1,485 |
| | % |
| Bus Usage | |
| Every day | 17 |
| At least once a week | 23 |
| At least once a month | 26 |
| At least once a year | 20 |
| Rarely or never | 14 |
| SkyTrain Usage | |
| Every day | 13 |
| At least once a week | 26 |
| At least once a month | 32 |
| At least once a year | 22 |
| Rarely or never | 6 |
| SeaBus Usage | |
| Every day | 1 |
| At least once a week | 2 |
| At least once a month | 9 |
| At least once a year | 36 |
| Rarely or never | 52 |
| West Coast Express Usage | |
| Every day | 1 |
| At least once a week | 1 |
| At least once a month | 2 |
| At least once a year | 7 |
| Rarely or never | 90 |
| HandyDART Usage | |
| Every day | 0 |
| At least once a week | 1 |
| At least once a month | 1 |
| At least once a year | 2 |
| Rarely or never | 97 |