



Transportation Investment Survey

SUMMARY REPORT
April 2013

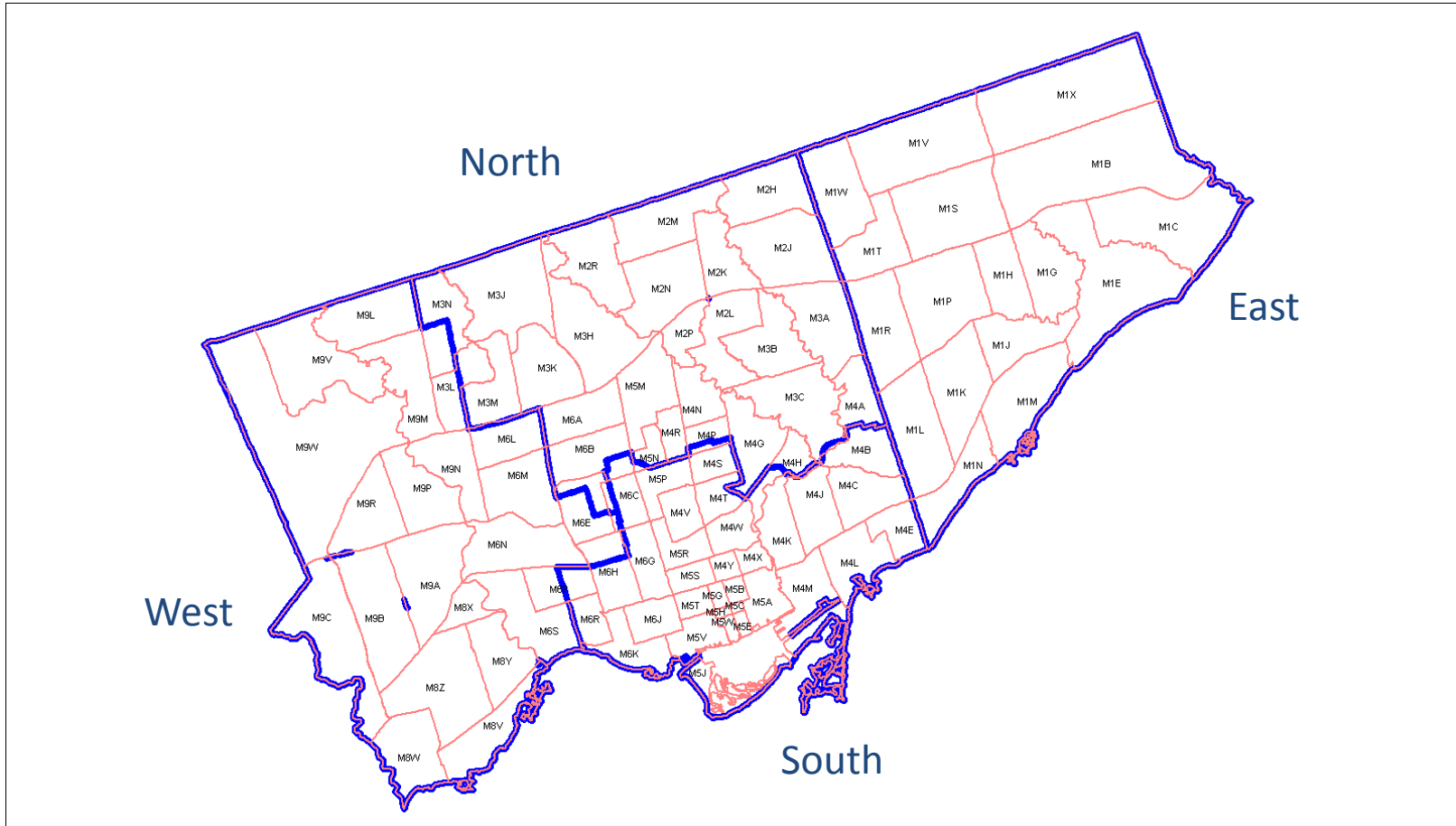


Objectives and Methodology

- This research was commissioned by the City of Toronto to collect feedback from Toronto residents regarding a number of options for financing transportation expansion.
- The City of Toronto has an opportunity to influence the choices Metrolinx will make concerning options to fund an additional \$2 billion per year expansion for their regional transportation plan, “The Big Move”. The additional revenue will be used to invest in an expanded transportation system in the Greater Toronto and Hamilton Area.
- A survey was conducted among adult City of Toronto residents to determine their:
 - Preferred criteria in evaluating and making decisions about transportation funding;
 - Preferred revenue generating tools;
 - Support for using dedicated government revenues to fund transportation;
 - Support for additional revenue tools if dedicated to specific modes of transportation; and
 - Belief that new sources of revenue are required to fund transportation expansion.
- The survey was conducted online among a sample of n=1,548 residents of the City of Toronto between March 25 and April 2, 2013.
- Results are weighted to the latest Statistics Canada census data to ensure that the sample of respondents are representative of the population of adult City of Toronto residents according to age, gender, and region.

Regional Breakdown: Community Council Districts

- Regional data in the report is provided by West, East, North, and South Community Council Districts, as detailed in the map below.



Executive Summary

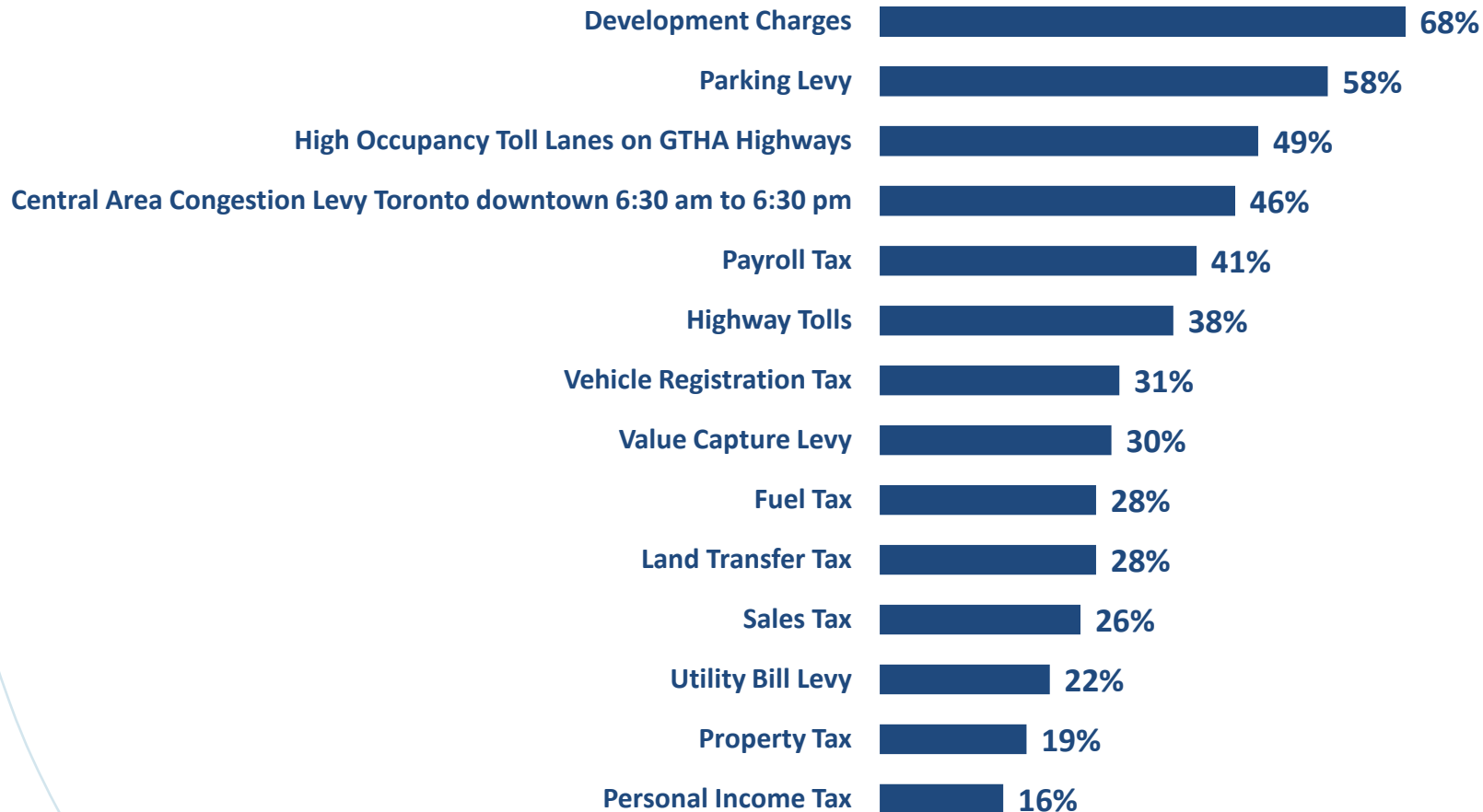
- In order to generate \$2 billion per year to finance transportation expansion, Toronto residents are most likely to support Development Charges (68%), a Parking Levy (58%), High Occupancy Toll Lanes on GTHA Highways (49%), a Central Area Congestion Levy in downtown Toronto (from 6:30am to 6:30pm) (46%), and a Payroll Tax (41%) most often.
- When deciding upon the criteria that should be used when making decisions about transportation infrastructure, Toronto residents say that Affordability (76%), Travel Experience (64%), Supporting Growth (56%), and providing Travel Options (48%) are most important to them.
- Almost all (92%) Toronto residents strongly or somewhat support the use of dedicated government revenues to fund transportation infrastructure. Half (49%) of residents ‘strongly support’ this.
- Similarly, more than eight in ten (85%) Toronto residents strongly or somewhat agree that new sources of revenue are required in order to fund transportation expansion.
- A majority of Toronto residents strongly or somewhat support additional revenue tools dedicated to many modes of transportation, including public transit (90%), roads (84%), highways (82%), pedestrian infrastructure (77%), and cycling infrastructure (61%).

Detailed Findings

Support for Revenue Tools to Fund Transportation

• Residents express the most interest in supporting Development Charges, a Parking Levy, High Occupancy Toll Lanes on GTHA Highways, a Central Area Congestion Levy, and a Payroll Tax as revenue tools in order to generate an additional \$2 billion per year to fund expanded transportation. Residents express the least amount of interest in increasing property taxes or personal income tax as a new revenue tool.

Revenue Options Selected Most Often



Respondents were asked to select five options.

Q4. In the chart below, please choose the TOP FIVE (5) revenue tools that you would be most interested in supporting in order to generate an additional \$2 billion per year. Note that the amounts included for each option are estimates of the potential revenue that can be generated from across the Greater Toronto and Hamilton Area for each option and are included for illustrative purposes.

Base: All respondents (n=1548)



Support for Revenue Tools to Fund Transportation by Community Council Districts

- The top five most supported revenue tools overall are the same in the West, North and East Community Council Districts.
- In the South, there is greater support for Highway Tolls and a Vehicle Registration Tax and lower support for a Payroll Tax. Also, those in the South are less likely to than other Districts to support Development Charges and more likely to support a Fuel Tax.

	Community Council Districts				
	Total	West	North	South	East
Development Charges	68%	72%	72%	60%	71%
Parking Levy	58%	57%	62%	56%	58%
High Occupancy Toll Lanes on GTHA Highways	49%	50%	45%	50%	52%
Central Area Congestion Levy Toronto downtown 6:30 am to 6:30 pm	46%	49%	46%	45%	43%
Payroll Tax	41%	42%	41%	32%	49%
Highway Tolls	38%	33%	36%	50%	32%
Vehicle Registration Tax	31%	27%	27%	43%	23%
Value Capture Levy	30%	33%	29%	26%	36%
Fuel Tax	28%	24%	27%	37%	23%
Land Transfer Tax	28%	26%	29%	24%	31%
Sales Tax	26%	26%	27%	25%	26%
Utility Bill Levy	22%	22%	26%	21%	21%
Property Tax	19%	19%	18%	17%	24%
Personal Income Tax	16%	20%	16%	15%	13%

Q4. In the chart below, please choose the TOP FIVE (5) revenue tools that you would be most interested in supporting in order to generate an additional \$2 billion per year. Note that the amounts included for each option are estimates of the potential revenue that can be generated from across the Greater Toronto and Hamilton Area for each option and are included for illustrative purposes.

Base: All respondents (n=1548)



Support for Revenue Tools to Fund Transportation by First and Second Ranking

- Respondents were asked to rank their support for the five revenue tools they prefer in order to fund transportation.
- The second column in the table below details the ranking of support for each option based on the number of respondents that selected the option as one of the five options they supported most.
- The third column in the table below provides a ranking for each option based on the respondent selecting the option as their first or second choice out of five choices they supported most.

	Rank as a % Support	Rank as a % selected first or second choice
Development Charges	1	1
Parking Levy	2	4
High Occupancy Toll Lanes on GTHA Highways	3	3
Central Area Congestion Levy Toronto Downtown	4	2
Payroll Tax	5	6
Highway Tolls	6	5
Vehicle Registration Tax	7	7
Value Capture Levy	8	8
Fuel Tax	9	9
Land Transfer Tax	10	11
Sales Tax	11	10
Utility Bill Levy	12	14
Property Tax	13	12
Personal Income Tax	14	13

Q5. Rank each of the revenue tools that you selected in terms of your support for each option.

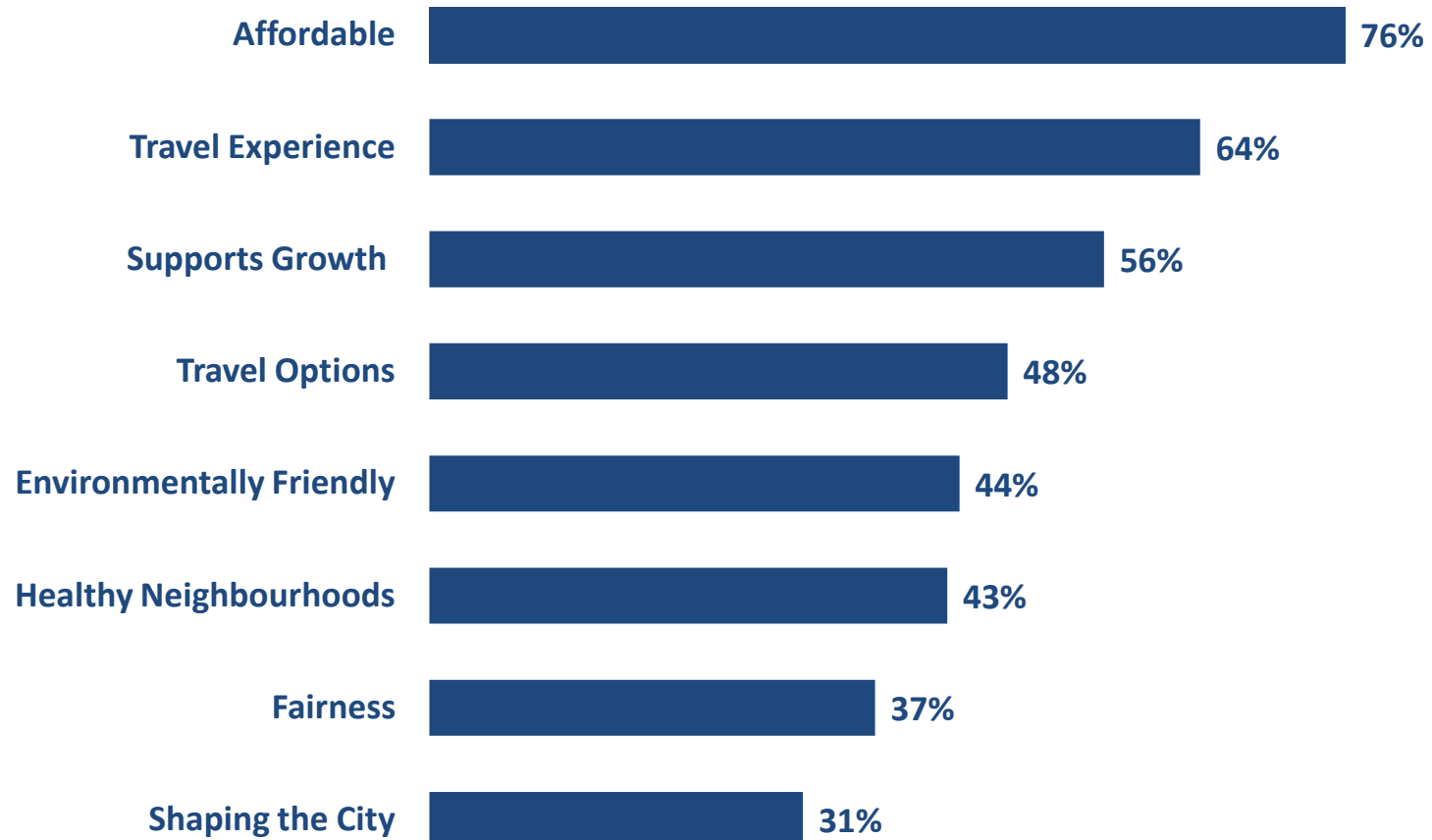
Base: All respondents (n=1548)



Most Important Criteria in Deciding Investments in Transportation Infrastructure

• Residents are most likely to choose Affordability, Travel Experience, Supporting Growth and Travel Options as the most important criteria in evaluating and making decisions about investments in transportation infrastructure in the City of Toronto.

Important Criteria Selected Most Often



Respondents were asked to select four options.

Q1. Many different criteria can be used to evaluate and make decisions about investments in transportation infrastructure in the City of Toronto. Please choose four (4) of the criteria below which are the most important to you.

Base: All respondents (n=1548)



Most Important Criteria in Deciding Investments in Transportation Infrastructure by Community Council Districts

- In the West and the South, the criteria Environmentally-Friendly and Healthy Neighbourhoods are viewed as more important criteria when deciding investments in transportation infrastructure, compared to in the North and East.
- While, those in the East are more likely than other districts to place a higher importance on Fairness.

	Community Council Districts				
	Total	West	North	South	East
Affordable	76%	74%	79%	73%	78%
Travel Experience	64%	63%	66%	66%	62%
Supports Growth	56%	57%	59%	52%	56%
Travel Options	48%	47%	49%	46%	52%
Environmentally Friendly	44%	48%	40%	50%	39%
Healthy Neighbourhoods	43%	47%	40%	48%	36%
Fairness	37%	38%	34%	31%	47%
Shaping the City	31%	26%	34%	34%	30%

Q1. Many different criteria can be used to evaluate and make decisions about investments in transportation infrastructure in the City of Toronto. Please choose four (4) of the criteria below which are the most important to you.

Base: All respondents (n=1548)



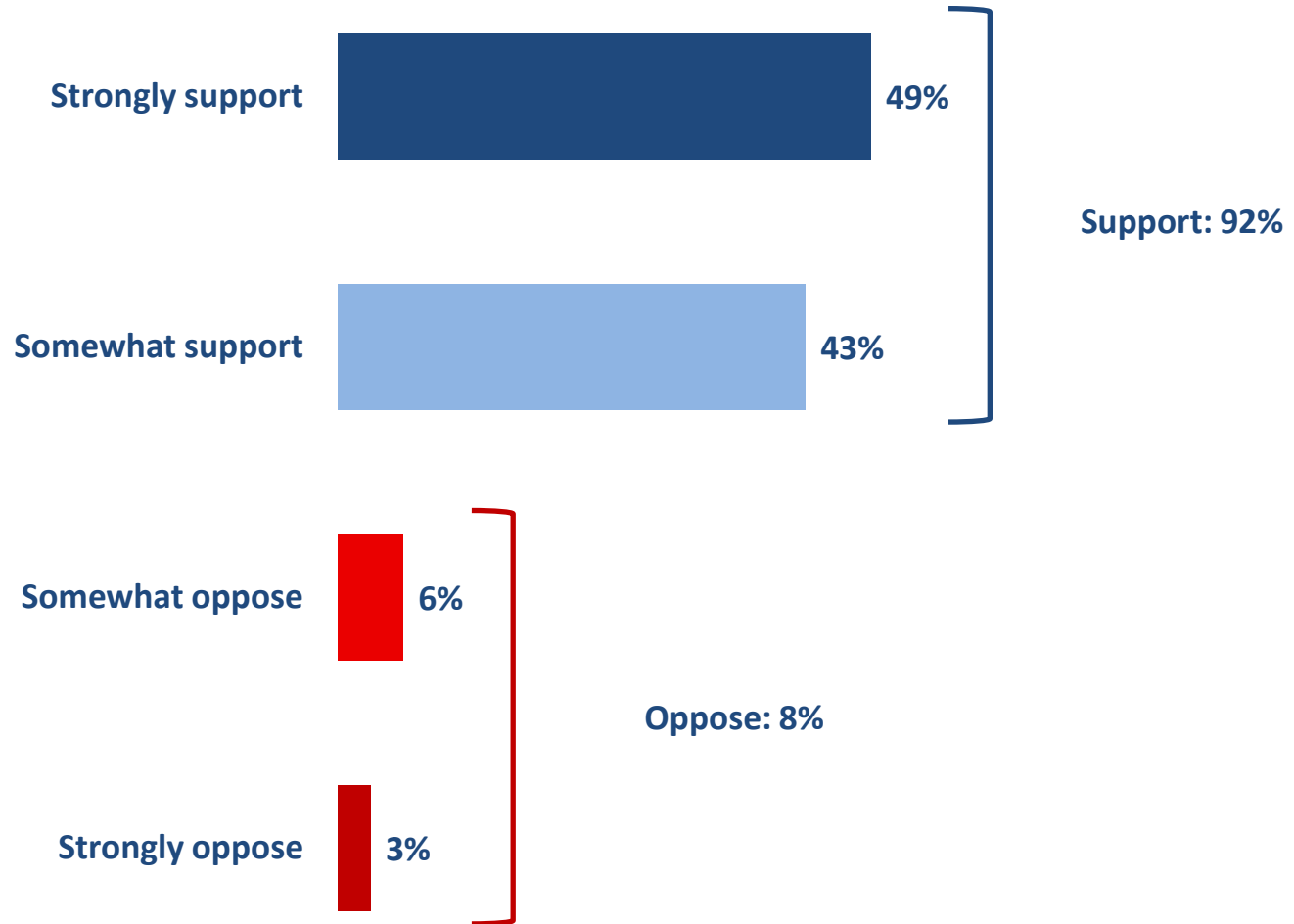
Most Important Criteria in Deciding Investments in Transportation Infrastructure by First and Second Ranking

- Respondents were asked to rank their support for the four most important criteria when deciding upon transportation infrastructure.
- The second column in the table below details the ranking of support for each option based on the number of respondents that selected the option as one of the four options they supported most.
- The third column in the table below provides a ranking for each option based on the respondent selecting the option as their first or second choice out of four choices they supported most.

	Rank as a % Support	Rank as a % selected first or second choice
Affordable	1	1
Travel Experience	2	2
Supports Growth	3	3
Travel Options	4	4
Environmentally Friendly	5	5
Healthy Neighbourhoods	6	6
Fairness	7	8
Shaping the City	8	7

Support for Dedicated Government Revenues to Fund Transportation

• Nine in ten (92%) Toronto residents support the use of dedicated government revenues to fund transportation infrastructure. Moreover, a half (49%) are strongly supportive of this idea.



Q7. Do you support or oppose the use of dedicated government revenues to fund transportation infrastructure? Dedicated revenue means that the government would commit to applying the funds received only to the funding of transportation infrastructure.

Base: All respondents (n=1548)



Support for Dedicated Government Revenues to Fund Transportation by Community Council Districts

• Vast majorities across all Community Council Districts support dedicated government revenues to fund transportation infrastructure, but support is stronger in the South (55%).

	Community Council Districts				
	Total	West	North	South	East
Strongly support	49%	48%	47%	55%	47%
Somewhat support	43%	40%	48%	39%	45%
Somewhat oppose	6%	7%	4%	4%	7%
Strongly oppose	3%	5%	2%	2%	1%
<i>Somewhat / Strongly support</i>	92%	88%	95%	94%	92%

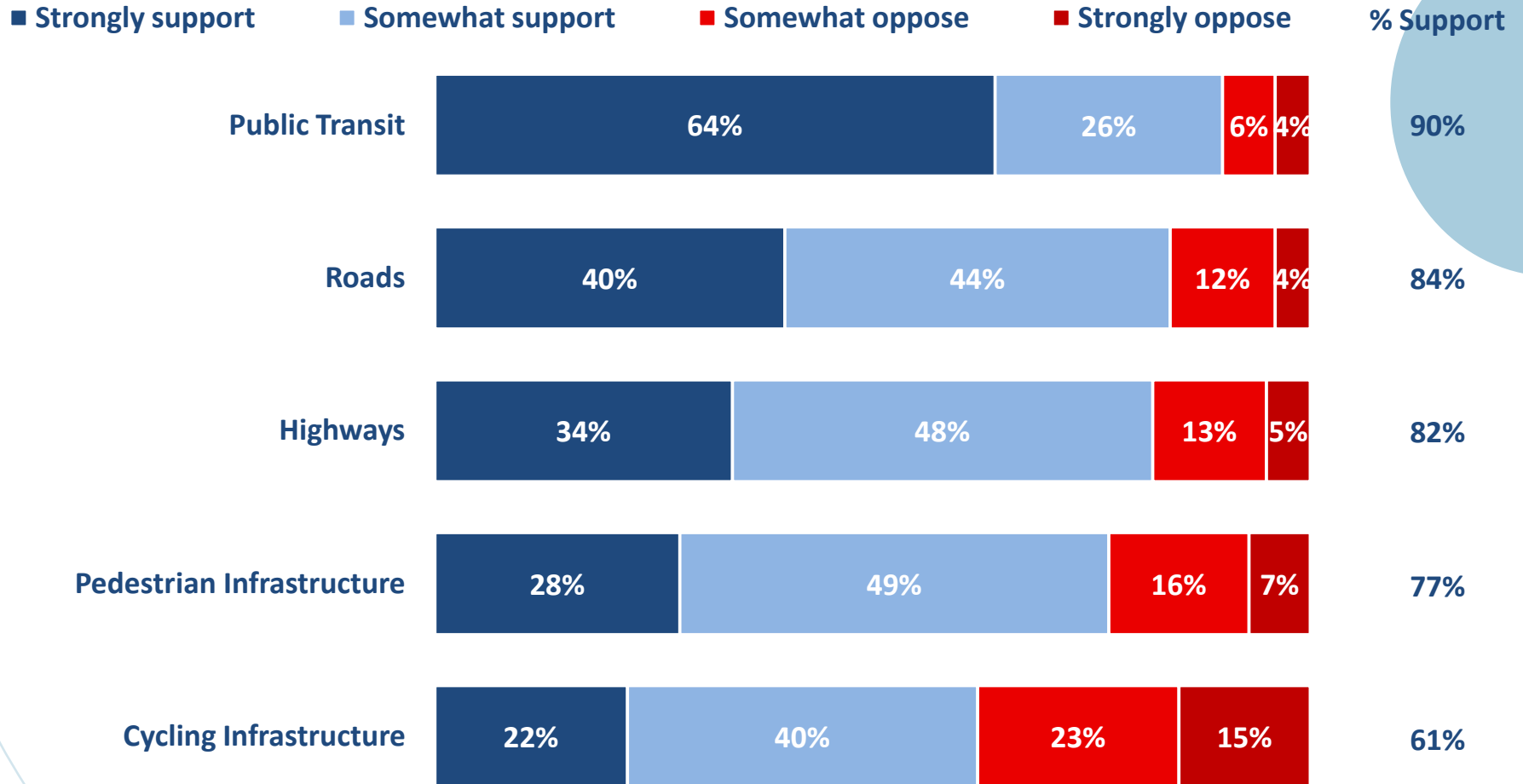
Q7. Do you support or oppose the use of dedicated government revenues to fund transportation infrastructure? Dedicated revenue means that the government would commit to applying the funds received only to the funding of transportation infrastructure.

Base: All respondents (n=1548)



Support for Additional Revenue Tools if Dedicated to Specific Modes of Transportation

- Majorities are supportive of additional revenue tools if the funding would be dedicated to any mode of transportation including public transit, roads, highways, pedestrian infrastructure, or cycling.
- However, support is strongest for additional revenue tools that are dedicated to public transit, with nine in ten (90%) expressing overall support, including a majority of two-thirds (64%) strongly supportive.



Q8. Would you support or oppose additional revenue tools to raise \$2 billion a year if the funding would be dedicated to the following modes of transportation?

Base: All respondents (n=1548)



Support for Additional Revenue Tools if Dedicated to Specific Modes of Transportation by Community Council Districts

- Strong support for additional revenue tools if dedicated to public transit is highest in the South Community Council District.
- The South District also expresses stronger support for additional revenue tools dedicated to pedestrian infrastructure and cycling.

% Strongly/ Somewhat Support	Community Council Districts				
	Total	West	North	South	East
Public Transit	90%	88%	91%	94%	87%
Roads	84%	84%	86%	80%	87%
Highways	82%	82%	83%	76%	87%
Pedestrian Infrastructure	77%	75%	75%	82%	72%
Cycling	61%	62%	62%	70%	52%

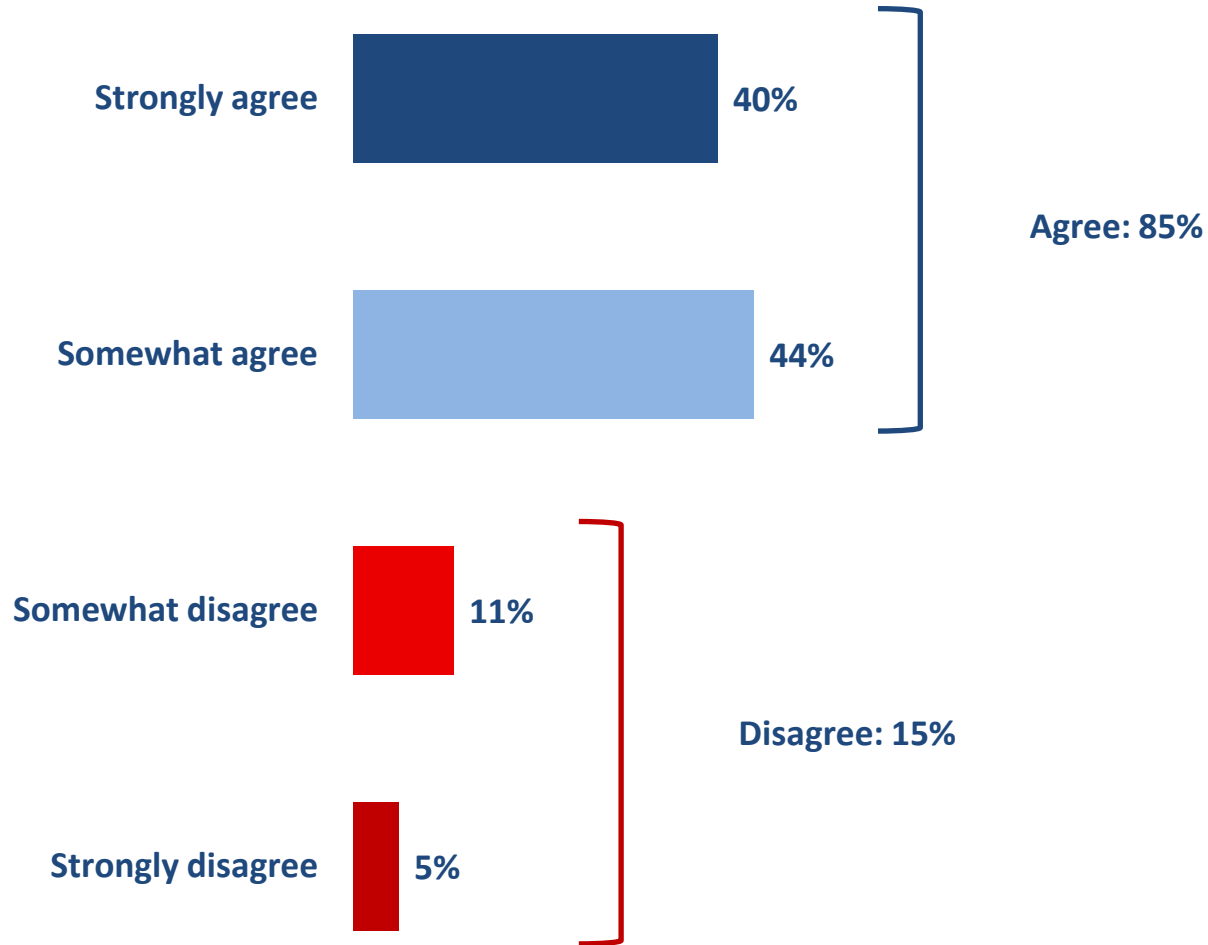
Q8. Would you support or oppose additional revenue tools to raise \$2 billion a year if the funding would be dedicated to the following modes of transportation?

Base: All respondents (n=1548)



Support for the Requirement of New Revenue Sources to Fund Transportation

• More than eight in ten (85%) Toronto residents agree that new sources of revenue are required to fund the expansion of transportation infrastructure, with four in ten (40%) expressing strong agreement.





Support for the Requirement of New Revenue Sources to Fund Transportation by Community Council Districts

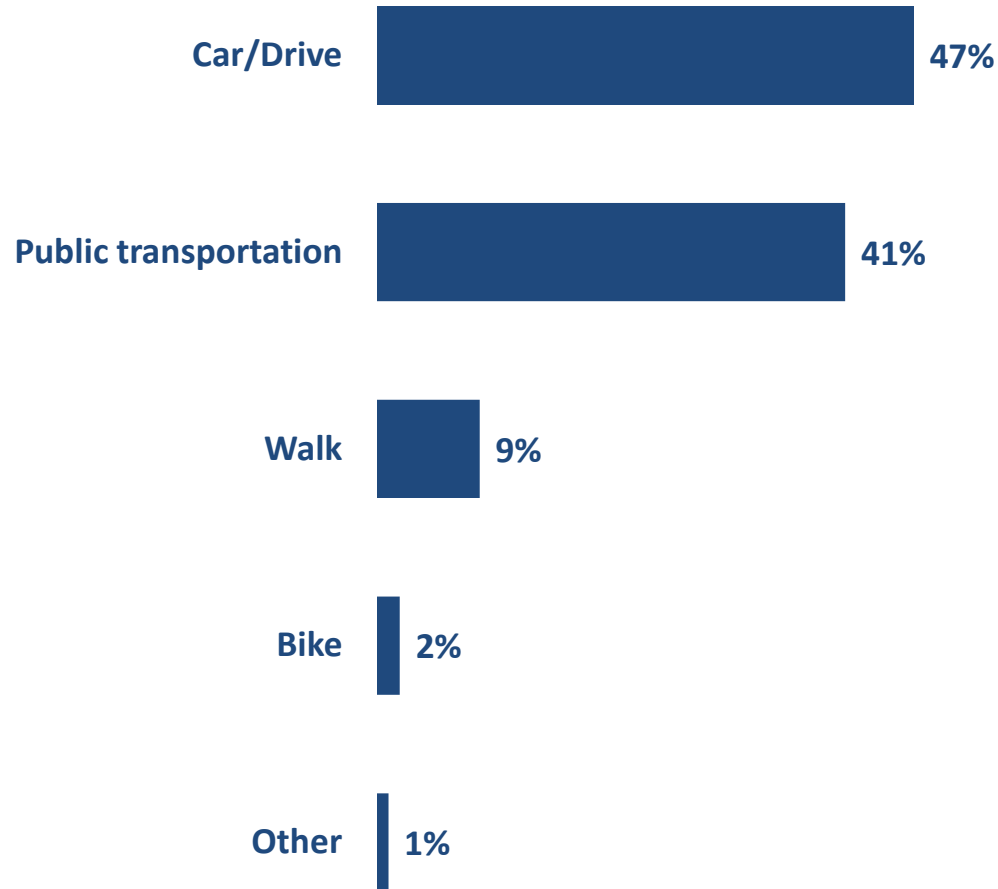
• Large majorities across all Community Council Districts agree that new sources of revenue are required to fund the expansion of transportation infrastructure.

	Community Council Districts				
	Total	West	North	South	East
Strongly agree	40%	39%	40%	45%	35%
Somewhat agree	44%	43%	44%	42%	49%
Somewhat disagree	11%	11%	11%	10%	12%
Strongly disagree	5%	7%	4%	3%	5%
<i>Somewhat / Strongly agree</i>	85%	82%	85%	87%	84%

Transportation Profile

Primary Means of Transportation

• A car is the primary means of transportation for about half (47%) of Toronto residents, followed by four in ten (41%) who mention public transportation.





Primary Means of Transportation

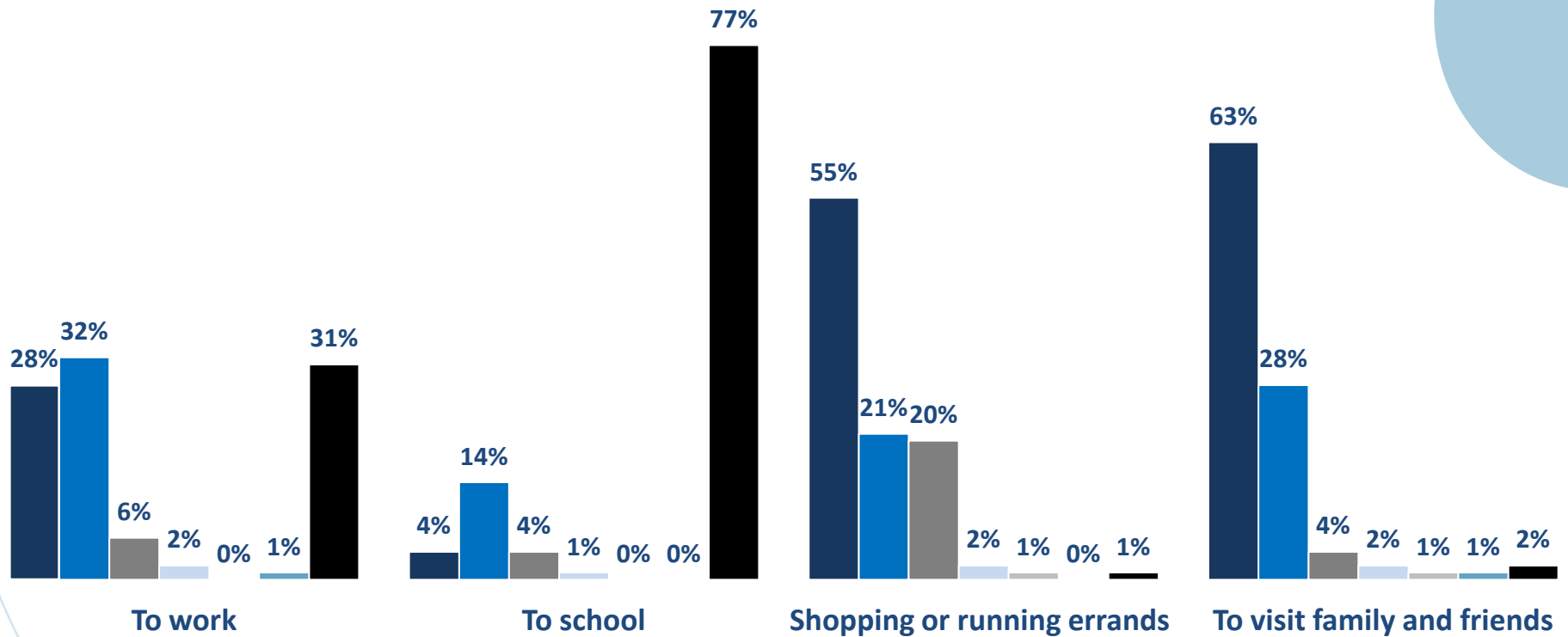
• Residents of the South Community Council District are less likely than others to report a car as their primary means of transportation, but are more likely to cite walking or biking.

	Total	Community Council Districts			
		West	North	South	East
Car/Drive	47%	57%	51%	27%	58%
Public transportation	41%	34%	43%	48%	37%
Walk	9%	7%	5%	18%	3%
Bike	2%	1%	-	6%	1%
Taxi	0%	0%	0%	0%	-
Carpool	0%	-	0%	-	1%
Other	1%	-	0%	1%	1%

Most Often Used Mode of Transportation to Get to Specific Destinations

- Majorities of Toronto residents most often use a car to visit family and friends (63%) and shopping or running errands (55%).
- Among the 69 percent of Torontonians who work, similar proportions report travelling by public transportation or by car (32% and 28%, respectively).
- Among the 23 percent of Torontonians who go to school, the largest proportion travel by public transportation (14%).

■ Car/Drive
 ■ Public transportation
 ■ Walk
 ■ Bike
 ■ Taxi
 ■ Carpool
 ■ Not Applicable



Q11. How do you most often travel to the following destinations? If you do not travel to any of these destinations indicate 'Not Applicable'.
 Base: All respondents (n=1548)

Most Often Used Mode of Transportation to Get to Specific Destinations

• Residents in the South Community Council District are more likely than others to walk to work and less likely to drive to school.

% To Work		Community Council Districts			
	Total	West	North	South	East
Public transportation	32%	26%	34%	38%	28%
Car/Drive	28%	39%	29%	15%	34%
Walk	6%	3%	3%	15%	3%
Bike	2%	2%	0%	4%	1%
Carpool	1%	1%	1%	0%	1%
Not Applicable	31%	29%	33%	27%	34%

% To School		Community Council Districts			
	Total	West	North	South	East
Public transportation	14%	10%	17%	16%	13%
Walk	4%	4%	5%	5%	4%
Car/Drive	4%	5%	5%	2%	7%
Bike	1%	0%	-	1%	1%
Not Applicable	77%	81%	74%	76%	76%

Most Often Used Mode of Transportation to Get to Specific Destinations

- Residents in the South District are more likely than others to go shopping or run errands via public transportation or walking, and less likely to use a car.
- Residents of the South are also more likely to use public transportation, walk or bike to visit family and friends, and less likely to use a car.

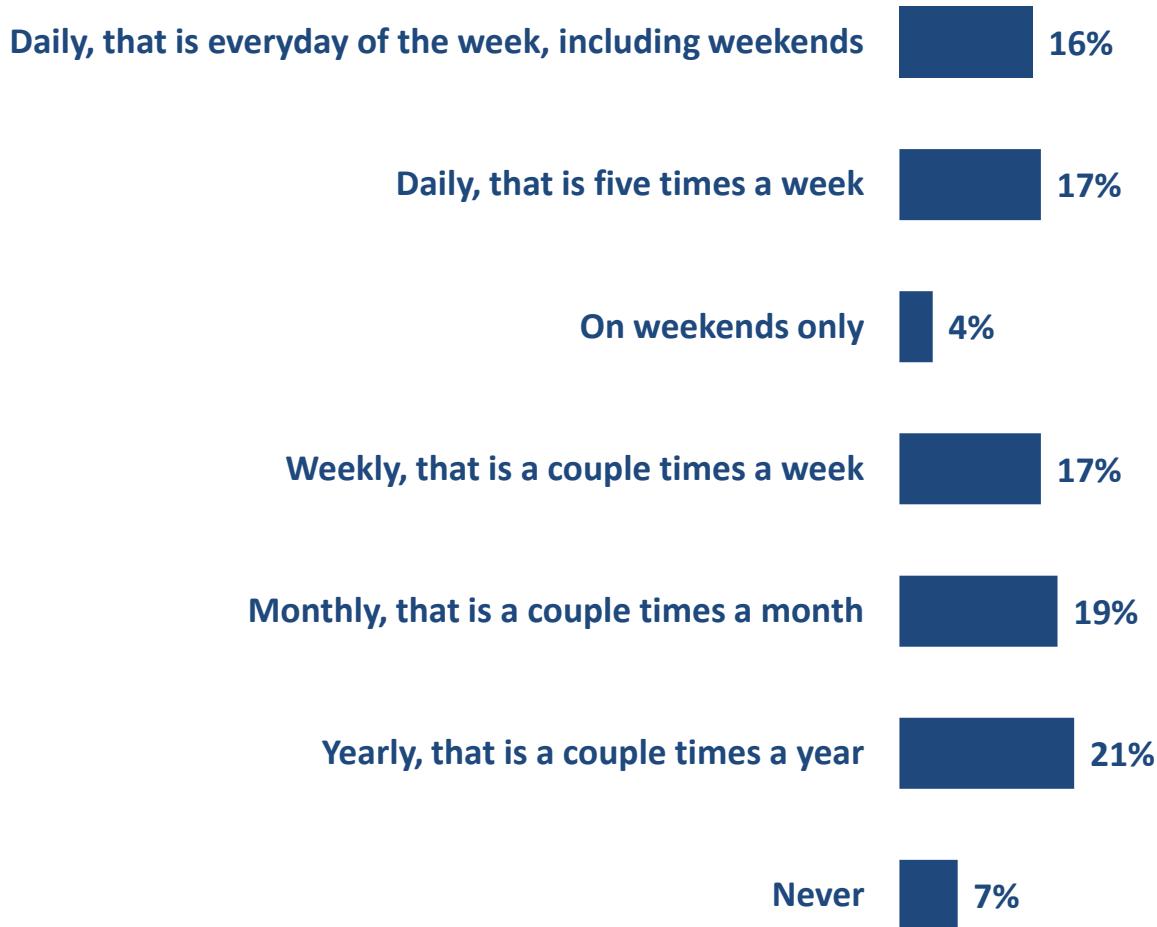
% Shopping or running errands		Community Council Districts			
	Total	West	North	South	East
Car/Drive	55%	67%	63%	32%	64%
Public transportation	21%	14%	20%	27%	21%
Walk	20%	16%	15%	34%	10%
Bike	2%	2%	1%	4%	1%
Taxi	1%	-	1%	1%	1%
Carpool	0%	0%	-	-	1%
Other	0%	0%	-	1%	0%
Not Applicable	1%	0%	1%	1%	1%

% To visit family and friends		Community Council Districts			
	Total	West	North	South	East
Car/Drive	63%	71%	68%	46%	71%
Public transportation	28%	22%	25%	41%	23%
Walk	4%	3%	2%	6%	2%
Bike	2%	1%	0%	5%	0%
Carpool	1%	2%	1%	-	2%
Taxi	1%	0%	1%	1%	-
Other	0%	0%	1%	0%	1%
Not Applicable	2%	1%	2%	2%	1%

Q11. How do you most often travel to the following destinations? If you do not travel to any of these destinations indicate 'Not Applicable'.
 Base: All respondents (n=1548)

Frequency of Using Public Transit

- One-third (33%) of Toronto residents use public transit daily (five times a week or everyday of the week, including weekends).
- A slightly smaller proportion, three in ten (28%), use public transit only a couple times a year or never.



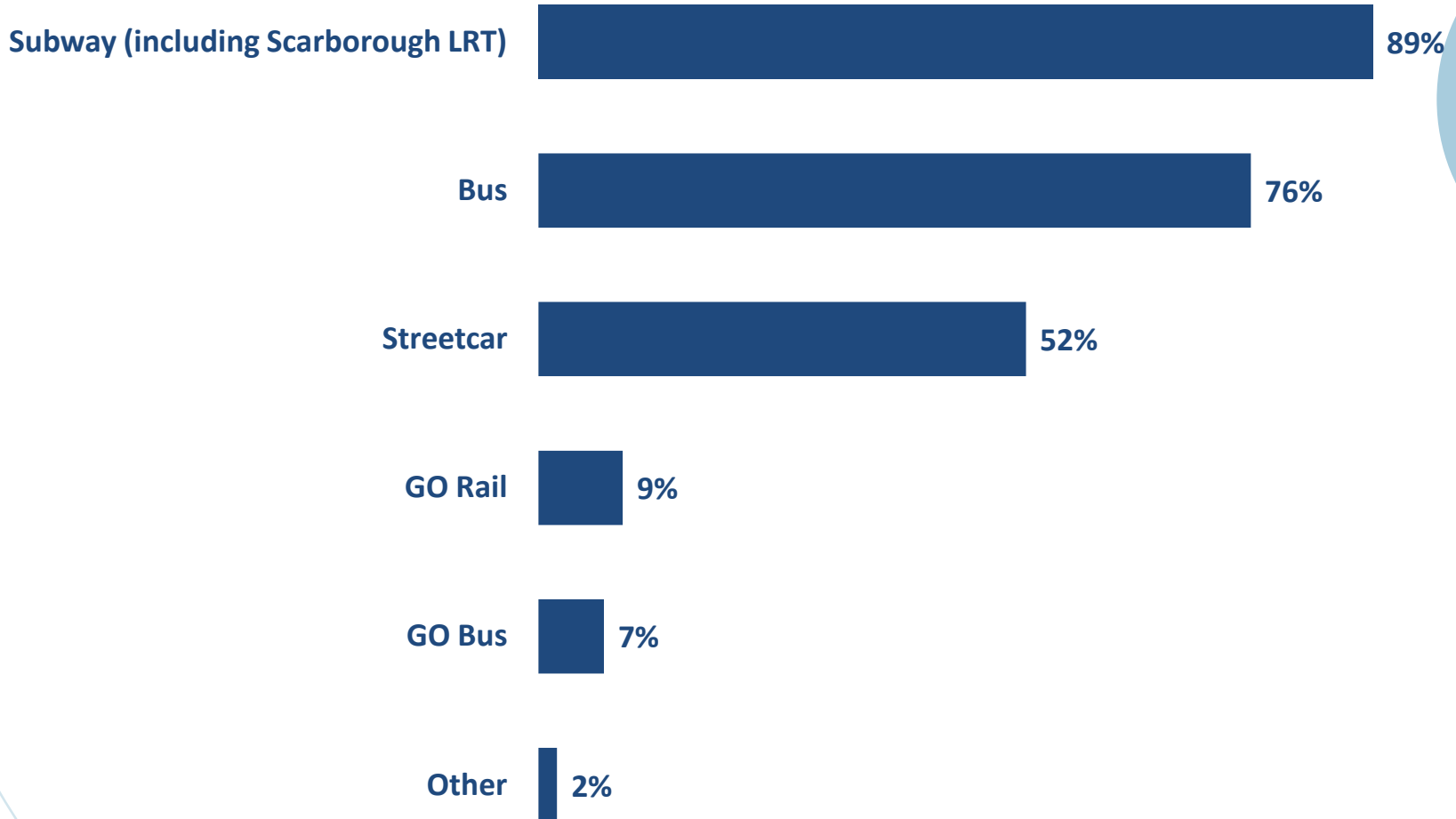
Frequency of Using Public Transit

• Residents in the South Community Council District are more likely than others to report using public transit everyday of the week, including weekends, or weekly and less likely to report using it yearly or never using it.

	Community Council Districts				
	Total	West	North	South	East
Daily, that is everyday of the week, including weekends	16%	13%	15%	21%	13%
Daily, that is five times a week	17%	15%	20%	16%	18%
On weekends only	4%	3%	5%	7%	3%
Weekly, that is a couple times a week	17%	14%	13%	28%	13%
Monthly, that is a couple times a month	19%	23%	20%	17%	15%
Yearly, that is a couple times a year	21%	24%	22%	11%	28%
Never	7%	9%	6%	2%	11%

Form of Transit Used in Toronto

- The subway is the most common form of transit in Toronto, with nine in ten (89%) using this type of public transportation.
- Three-quarters (76%) say the bus is their most common form of transit, while half (52%) report using a streetcar.



Form of Transit Used in Toronto by Community Council District

- Residents of the East Community Council District are less likely than other residents to use the subway as the primary form of public transit in Toronto.
- Those living in the South are more likely than other residents to mention a streetcar as their primary form of public transit.

	Community Council Districts				
	Total	West	North	South	East
Subway (including Scarborough LRT)	89%	90%	94%	92%	78%
Bus	76%	79%	77%	72%	83%
Streetcar	52%	51%	39%	74%	32%
GO Rail	9%	9%	3%	12%	12%
GO Bus	7%	6%	3%	10%	5%
Other	2%	1%	2%	2%	3%

Appendix: Demographics

	Total
Gender:	
Male	47%
Female	53%
Age:	
18 to 24	12%
25 to 34	19%
35 to 44	18%
45 to 54	19%
55 to 64	14%
65 +	18%

	Total
Highest Level of Education:	
Grade school or some high school	2%
Complete high school	12%
Complete technical or trade school/Community college	16%
Some community college or university, but did not finish	17%
Complete university degree, such as a Bachelor's	39%
Post-graduate degree, such as a Master's or Ph.D	15%

Appendix: Demographics and Other Information

	Total
Number of Motor Vehicles:	
0	22%
1	51%
2	23%
3	4%
Born in Canada:	
Yes	66%
No	34%
Household Income:	
Under \$20,000	8%
\$20,000 to just under \$40,000	17%
\$40,000 to just under \$80,000	37%
\$80,000 to just under \$120,000	22%
\$120,000 to just under \$160,000	9%
\$160,000 or more	7%

	Total
Tenure in the City of Toronto:	
Less than 1 year	2%
1 to just under 5 years	10%
5 to just under 10 years	10%
10 to just under 20 years	15%
20 years or more	64%
Number of People in Household:	
1	25%
2	37%
3	17%
4	14%
5	6%
6	2%

Appendix: Revenue Tool Definitions

REVENUE OPTION	HOW IT WORKS	WHO PAYS IN THE GTHA	NOMINAL RATE INCREASE	ESTIMATED ANNUAL REVENUE (2014 \$)	ESTIMATED AVERAGE ANNUAL COST TORONTO
Personal Income Tax	An increase to Provincial tax on personal taxable income	Everyone	1%	\$1.36 billion	\$600/ household
Sales Tax	Percentage rate applied on goods and services purchased	Everyone	1%	\$1.24 billion	\$550/ Household
Payroll Tax	Tax levied on businesses based on the gross salary of employees, potentially based on proximity to new transportation infrastructure	Business	1%	\$510 million	Varies depending on number of employees and salaries
Property Tax	Percentage-based increase to current property taxes, potentially tied to updates to assessed value (CVA)	Property Owners	5% overall	\$480 million	\$196 average residential increase
Parking Levy	Daily levy charged to property owner based on the amount of non-residential off-street parking spaces owned	Commercial Land/ Property Owners	\$1/space/day or \$365/space/ yr	\$1.36 billion	Depends on number of spaces
Land Transfer Tax	Percentage tax payable at the time of purchase, based on the amount paid for Properties	Real Estate Buyers	1%	\$450 million	\$4,750/average residential property Purchase
Fuel Tax	Additional tax levied on the sale of transportation fuels, calculated by volume or purchased price (HST)	Drivers	10 cents/litre	\$730 million	10 cents/litre or \$6.00/fill up assuming a 60 litre fuel tank
Vehicle Registration Tax	Fee paid by vehicle owners when registering a new vehicle, or renewing registrations annually	Vehicle Owners	\$100/registration or renewal	\$300 million	\$100/vehicle
Highway Tolls	Toll per kilometre travelled on 400 series highways and major municipal expressways	Drivers	10 cents/km	\$1.38 billion	10 cents/km
High Occupancy Toll Lanes on GTHA Highways	Charge on vehicles using high occupancy vehicle (HOV) lanes, carrying fewer than three People	Drivers	\$0.30/km	\$25 million	30 cents/km
Central Area Congestion Levy Toronto downtown 6:30 am to 6:30 pm	Motorists are charged a toll for entering the downtown core	Drivers	\$8 vehicle	\$110 million	\$8/vehicle /entry
Development Charges	One-time levies imposed on new developments and eligible re-developments used to pay for growth-related infrastructure	Land/ Property Developers	15% increase	\$90 million	Amount varies depending on type of build
Value Capture Levy	Capitalizes on increased value in property, and new property development that results from transportation investment	Land/ Property Owners	To be Determined	\$20 million	To be determined
Utility Bill Levy	Monthly fee collected from residences and businesses within a region (collected through utility bills)	Utility Users	\$3/month	\$90 million	\$36/year/ household

Appendix: Importance Criteria Definitions

CRITERIA	HOW IT WORKS
Travel Options	Develop an integrated network that connects different modes to provide for more travel options
Travel Experience	Provide capacity to ease crowding/congestion; reduce travel times; make travel more reliable, safe and enjoyable
Fairness	Do not favour any group over others; allow everyone good access to work, school and other activities
Shaping the City	Use the transportation network as a tool to shape development of the City
Healthy Neighbourhoods	Changes in transportation network should strengthen and enhance existing neighbourhoods; promote safe walking and cycling within and between neighbourhoods
Environmentally Friendly	Support and enhance natural areas and encourage people to reduce the distance they drive
Affordable	Improvements to transportation system should be affordable to build, maintain and operate
Supports Growth	Investment in public transportation should support economic development; allow workers to get to jobs more easily; allow goods to get to markets more efficiently



Ipsos Reid



Transportation Investment Survey

SUMMARY REPORT
April 2013

