



Transit Fare Review Survey Phase III

Prepared for:
TransLink

February 22, 2018 [FINAL]



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Contents

[03] Background, Objectives & Methodology

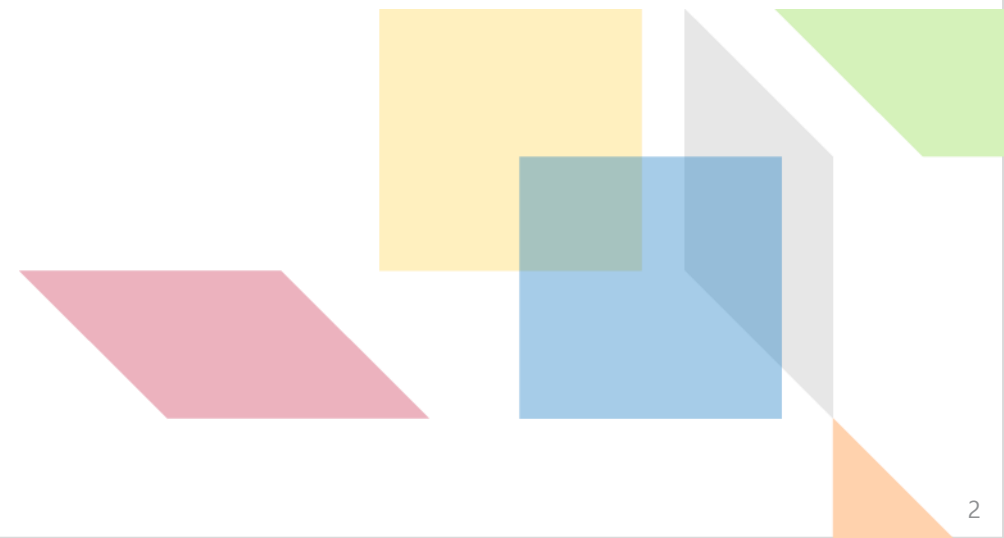
[06] Executive Summary

[09] Summary of Findings

- ▶ TransLink Listens Survey Results
- ▶ Public Survey Results

[32] Appendix

- ▶ Respondent Profile



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Background, Objectives & Methodology



Background & Objectives

The Transit Fare Review is comprised of four phases.

- › Phase 1, which took place in May-June 2016, measured resident's satisfaction with the current way that transit is priced in Metro Vancouver.
- › Phase 2, which took place in Jan-Feb 2017, measured residents' opinions regarding different options for varying fares by distance, by time of travel, and by service type.
- › In Phase 3, which is covered in this report, residents were asked for their opinions on the short-listed fare options narrowed down based on the results from the earlier phases.

Specifically, the survey assesses support for the following components of the fare structure:

- › How to price fares by distance travelled, including:
 - Overall support/opposition for replacing the current zone system with a fare system that more closely reflects distances travelled
 - Fares priced by kilometre on rapid transit and flat fare on bus
 - Fares priced by kilometre across the transit system
- › Fare products for frequent riders, including:
 - Pre-paid passes
 - Fare capping
- › Customer discounts, including:
 - Overall support/opposition for expanding discounts to low-income individuals not receiving discounted transit fares through an existing, external program
 - Increasing fares to pay for discounts to low-income individuals
 - Opinions on changing existing discounts

Survey results from Phase 3 will be used, along with ongoing technical analysis, to develop a recommended approach that will form the basis of Phase 4 public engagement in mid-2018.

Survey Design & Data Collection

The survey was designed by TransLink and administered online to two groups: members of TransLink Listens - TransLink’s online member panel – and the general public (who could participate by visiting the TransLink website). The surveys were open for participation from November 20 to December 11, 2017.

The table below outlines the final sample sizes for both surveys.

	Final Sample Size
TransLink Listens Panelists	1,142
Public Survey Respondents	12,879

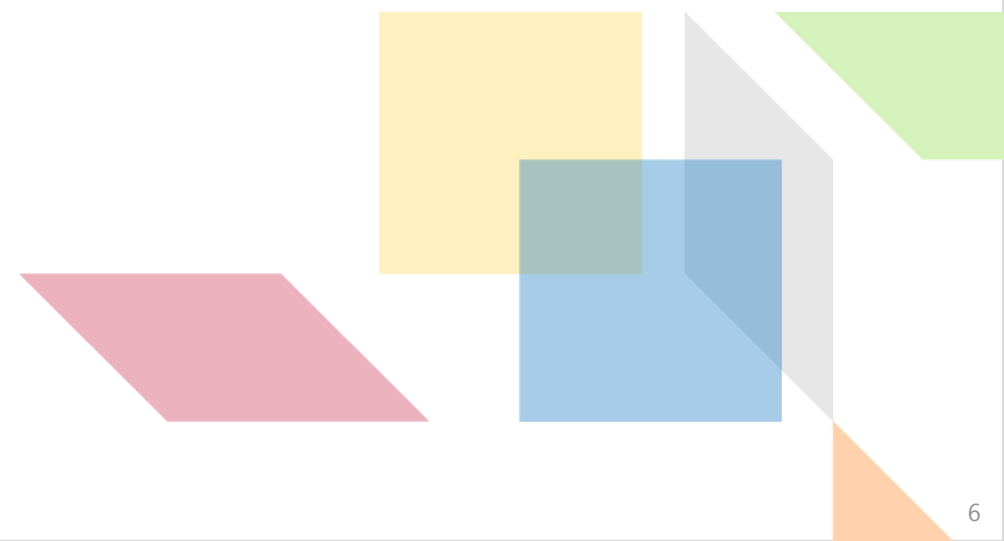
The TransLink Listens dataset was weighted to reflect the Metro Vancouver population with respect to region, age, gender and main mode of transportation. No weighting was applied to the Public Survey data.

NOTE: TransLink Listens panelists’ responses may differ from random general population surveying, even with weighting, because of their deeper engagement with transit and transportation issues.



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Executive Summary



Varying Fares by Distance

Overall, seven-in-ten respondents from both surveys support replacing the current zone system with a fare system that more closely reflects distance travelled.

Of the two options presented, respondents express the strongest preference for pricing fares by kilometre on rapid transit with a flat fare on bus. This option is perceived as fair, simple and avoids having to tap out on buses.

Respondents are relatively less likely to agree with pricing fares by kilometre across the entire transit system. Generally, those who disagree are concerned with cost, feeling that fares may be too expensive (particularly for those who live farther from the city), or that higher fares would deter transit use.

Fare Product Options

While respondents support both pre-paid passes and fare capping, a slightly higher proportion agree with pre-paid passes (seven-in-ten compared to six-in-ten).

Respondents perceive pre-paid passes as simple/convenient and good for frequent riders, but recognize that may not be a good option for those who can't predict how frequently they'll travel or cannot afford to pay upfront.

Although fare capping is seen as fair and allows flexibility, respondents express concern that fares will be more expensive than the current system.

Expanding Customer Discounts

Just under two-thirds of respondents (62-63%) feel that customer discounts should be expanded to include low-income individuals who do not currently receive discounts through an existing external program.

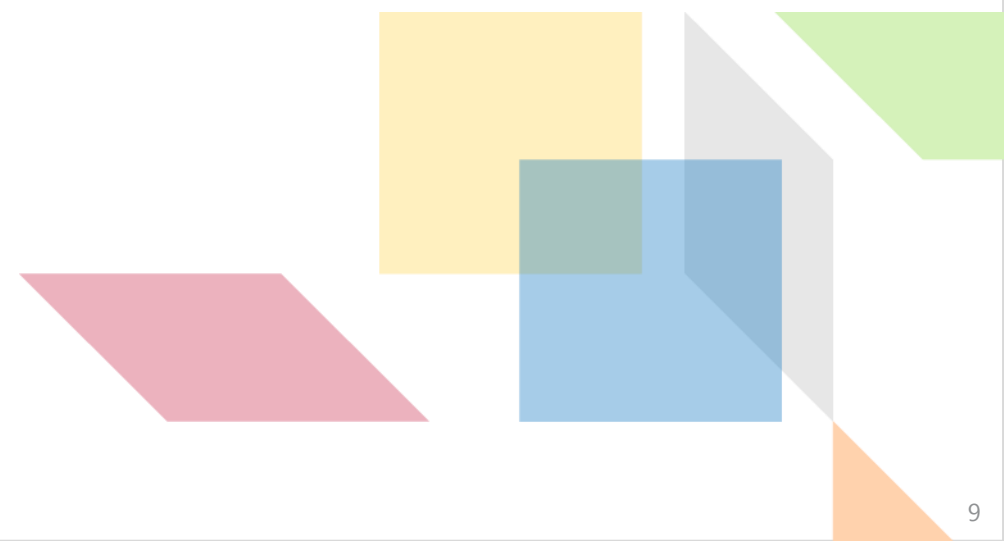
However, when asked their level of support for increasing fares to pay for discounts to low-income individuals, results are more split. For example, among TLL panelists 47% support the increase, while 41% oppose increasing other fares.

Overall, 36% of survey respondents feel that TransLink should make changes to the existing customer discounts. Among those who would like to see changes, the main mention is to offer discounts for low-income riders.

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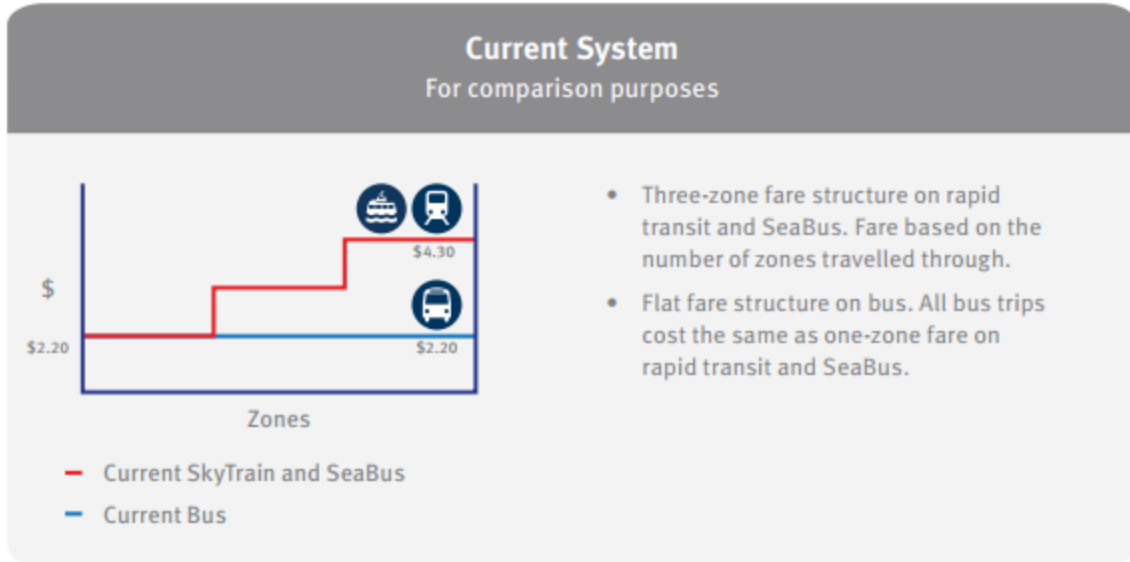
Summary of Findings

TransLink Listens Survey



Varying Fares by Distance

> Before assessing the options for varying fares by distance, panelists were asked to watch a short video and were presented with the following information.



Shortlisted Options for Varying Fares by Distance Travelled

Option 1

Fares priced by KM on rapid transit and flat fare on bus

- The base fare for bus, rapid transit and SeaBus is the same.
- All bus trips cost the base fare.
- Fares on rapid transit increase with each kilometre travelled until a maximum fare is reached.

Option 2

Fares priced by KM across the transit system

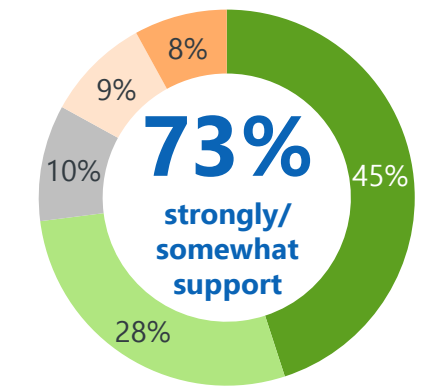
- The base fare for bus and rapid transit is the same.
- Fares on bus and rapid transit increase with each kilometre travelled until a maximum fare is reached.

**Rapid transit includes SkyTrain, Canada Line, and SeaBus. Like today, West Coast Express would continue to be priced at a higher rate to reflect premium service.*

Varying Fares by Distance

- › Overall, three-quarters of TransLink Listens Panelists support replacing the current three-zone system with a fare system that more closely reflects distance travelled. This includes just under half (45%) that strongly support this change.
- › Compared to their counterparts in other regions, panelists living in the South of Fraser and Northeast are less likely to support a distance-based fare system (although two-thirds do still support it).
- › Similarly, panelists who most frequently travel the greatest distances (three or more zones) are less likely to support a fare system that more closely reflects distance travelled.

Level of Support for Replacing Current Zone System with a Fare System that more closely Reflects Distance Travelled



(n=1,142)

- Strongly Support
- Somewhat Support
- Neither Support nor Oppose
- Somewhat Oppose
- Strongly Oppose

% Supporting Across Subgroups

Region	Vancouver	Burnaby/ New West	South of Fraser	Northeast	North Shore
	75%	82%	67%	68%	85%

By # Zones Most Frequently Travelled	One	Two	Three or More
	75%	80%	63%

By Frequency of Transit Use	Daily	Weekly	Monthly or less
	74%	72%	73%

Main Mode of Transport	SOV	Rideshare	Transit	Bike/Walk
	74%	72%	72%	72%

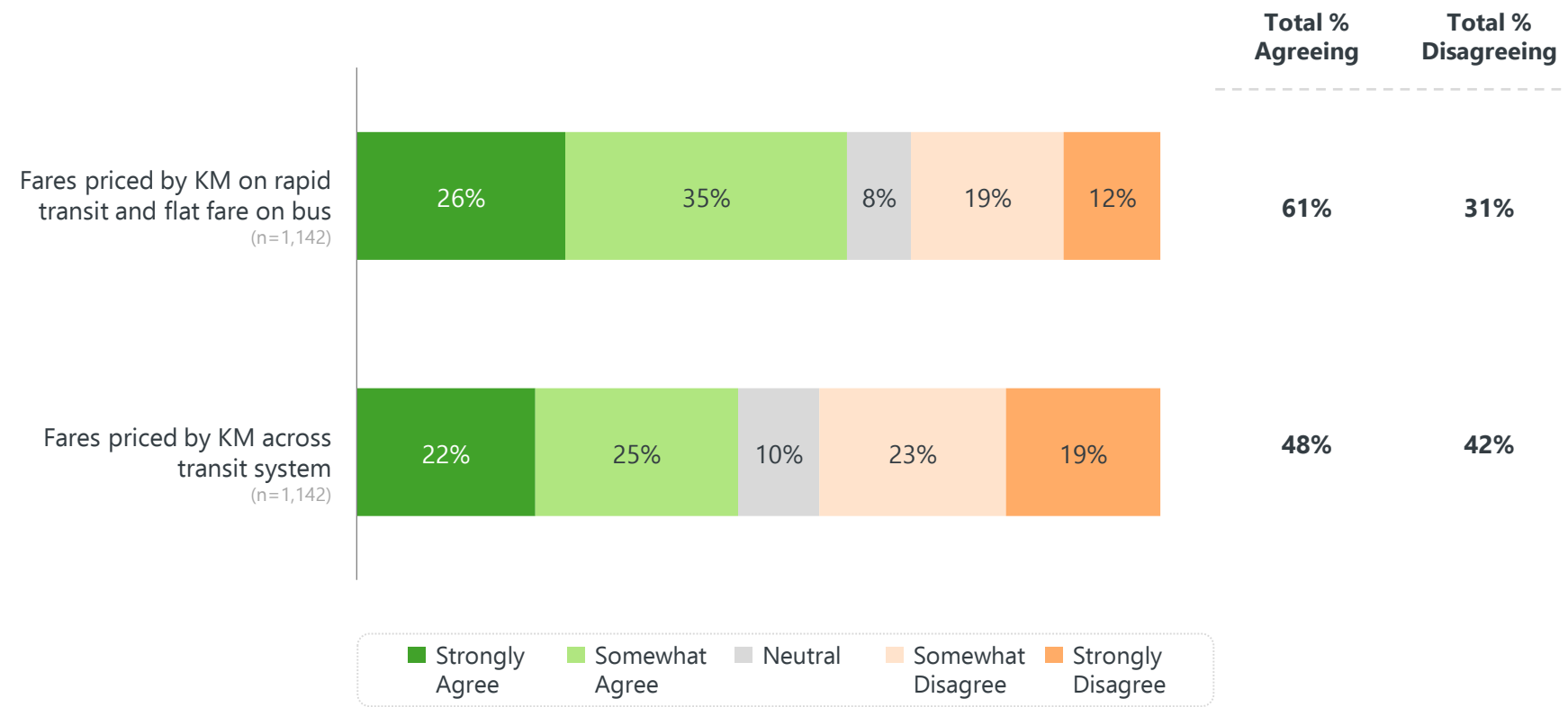
TLL Survey data has been weighted.

- S1Q1. Do you support or oppose replacing the current three-zone system with a fare system that more closely reflects distance travelled?
- S1Q2. To what extent do you agree or disagree with Option #1: Fares priced by kilometre on rapid transit and flat fare on bus?
- S1Q3. To what extent do you agree or disagree with Option #2: Fares priced by kilometre across the transit system?

Options for Varying Fares by Distance

- > Of the two options for varying fares by distance, fares priced by KM on rapid transit and flat fare on bus is most preferred – 61% agree with this option, while 31% disagree.
- > Comparatively, just under half of TransLink Listens panelists (48%) agree that fares should be priced by KM across the transit system and 42% disagree.

Support for Options for Varying Fares by Distance



TLL Survey data has been weighted.

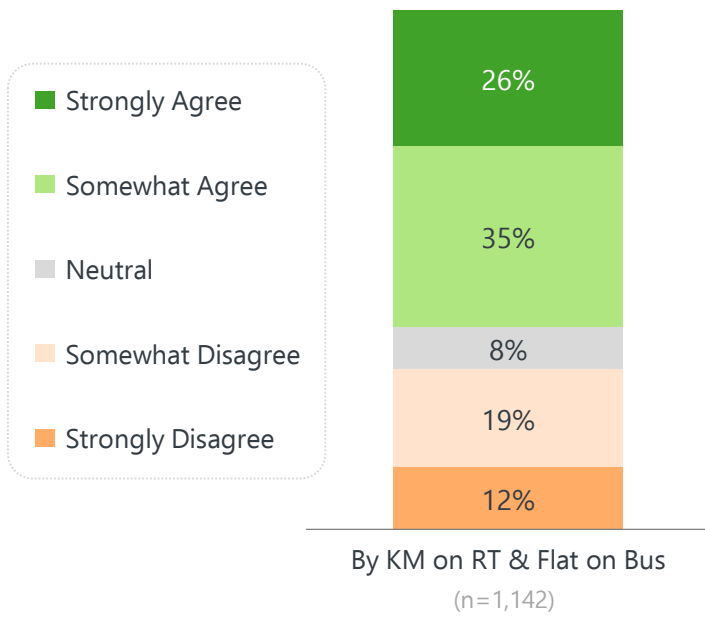
S1Q2. To what extent do you agree or disagree with Option #1: Fares priced by kilometre on rapid transit and flat fare on bus?

S1Q3. To what extent do you agree or disagree with Option #2: Fares priced by kilometre across the transit system?

Support for Fares Priced By KM on Rapid Transit and Flat Fare on Bus

- > The main reasons that panelists agree with fares priced by KM on rapid transit and flat fare on bus are that it's fair, simple and avoids the need to tap out on the bus.
- > Cost is the primary reason for disliking the option – 20% believe that rapid transit will be too expensive for those living farther from the city, while 14% mention that it will be too expensive generally.

Level of Support for Fares Priced by KM on Rapid Transit and Flat Fare on Bus



Top Reasons for Agreeing (unaided mentions among those agreeing)

Base	391
It is fair/makes sense	15%
Don't need to tap out on bus/tap out on bus doesn't work	12%
It is simple/easy to understand	10%
Fares should reflect distance travelled	6%
Reflects operation costs	5%
Better than the current zone system	5%

Top Reasons for Disagreeing (unaided mentions among those disagreeing)

Base	281
Rapid transit will be too expensive for those living farther from city	20%
Prices will be too expensive/discourages transit use	14%
Should pay for distance travelled on buses too/prefer option 2	12%
Fares should be the same regardless of mode of transport	9%
Fares should not vary by distance/prefer flat fare across entire transit system	7%
It is unfair	7%

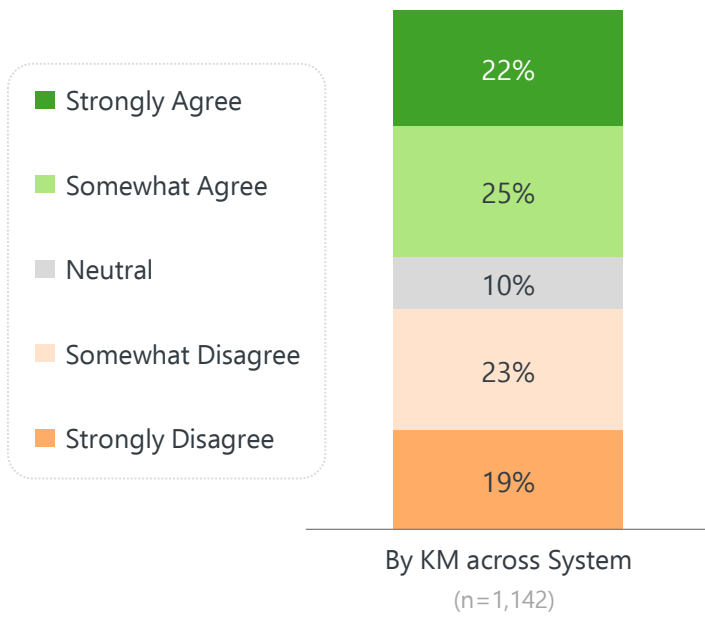
Note: only major mentions are shown. Percentages may add to more than 100% given that a respondent can offer multiple reasons.
TLL Survey data has been weighted.

S1Q2. To what extent do you agree or disagree with Option #1: Fares priced by kilometre on rapid transit and flat fare on bus?

Support for Fares Priced By KM across Transit System

- > Half of panelists who support pricing fares by KM across the transit system agree with the option because it is fair and makes sense.
- > Among those who disagree with the option, 35% believe that it will be too expensive for riders who live farther from the city, while 22% feel that bus fares should be less expensive than Rapid Transit fares or it could discourage bus use.

Level of Support for Fares Priced by KM across Transit System



Top Reasons for Agreeing (unaided mentions among those agreeing)

Base	290
It is fair/makes sense	52%
Fares should reflect distance travelled	10%
It is simple/easy to understand	8%
Promotes transit use within the city/short trips	7%
Reflects operation costs	6%
Agree, but will be more expensive for those living farther from city	7%

Top Reasons for Disagreeing (unaided mentions among those disagreeing)

Base	349
More expensive for those living farther from city	35%
Buses should not be priced same as Rapid Transit/discourages use of buses	22%
Don't want to tap out on bus/tap out doesn't work	13%
Difficult to calculate costs/predict fares	8%
May pay more for taking an indirect route	7%
Fares should not vary by distance/prefer flat fare across entire transit system	7%

Note: only major mentions are shown. Percentages may add to more than 100% given that a respondent can offer multiple reasons.
 TLL Survey data has been weighted.

S1Q3. To what extent do you agree or disagree with Option #2: Fares priced by kilometre across the transit system?

Fare Product Options

› Before assessing the options for fare products, panelists were asked to watch a short video and were presented with the following information.

Shortlisted Options for Fare Products

1. Pre-paid Pass

Pay in advance for unlimited travel during a set period of time.

A pre-paid pass offers unlimited travel over a given time period. In practice, this means that frequent riders get a discount when they purchase a pass in advance. There are many different ways a pre-paid pass could be implemented in a future fare system. For example, the pre-paid pass could be valid for unlimited trips of a specified distance within a certain time period, such as a week or month.

Benefits

The pre-paid pass is a relatively simple option with predictable fares; you only have to pay once.

Disadvantages

As it requires upfront payment, individuals who can't afford to pay the full amount in advance can't take advantage of this discounted fare product. Also, if you purchase a pass and aren't able to use it as much as you intended before the time period ends, you will have paid more for each trip than you would have without a pass.

2. Fare Capping

Pay-as-you-go with a fare cap, after which travel is free.

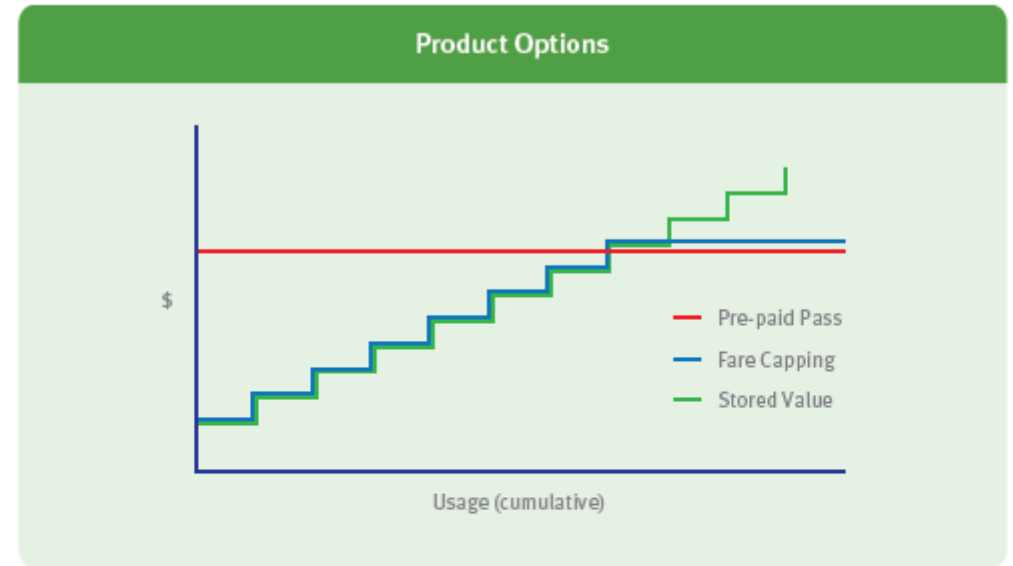
With this option, you pay the regular fare for each trip until you hit a certain threshold and then remaining travel is free within a set time period, such as a day, week or month.

Benefits

It offers a best price guarantee to all riders, extending the frequent travel discount to anyone who takes enough trips. Unlike a pre-paid pass, there is no requirement to purchase anything in advance, so this benefit applies equally to everyone.

Disadvantages

As a result of extending the discount to all frequent users (not just those who purchase it in advance), the fare cap would likely be set slightly higher than the cost of the pre-paid pass.



This figure illustrates the differences between:

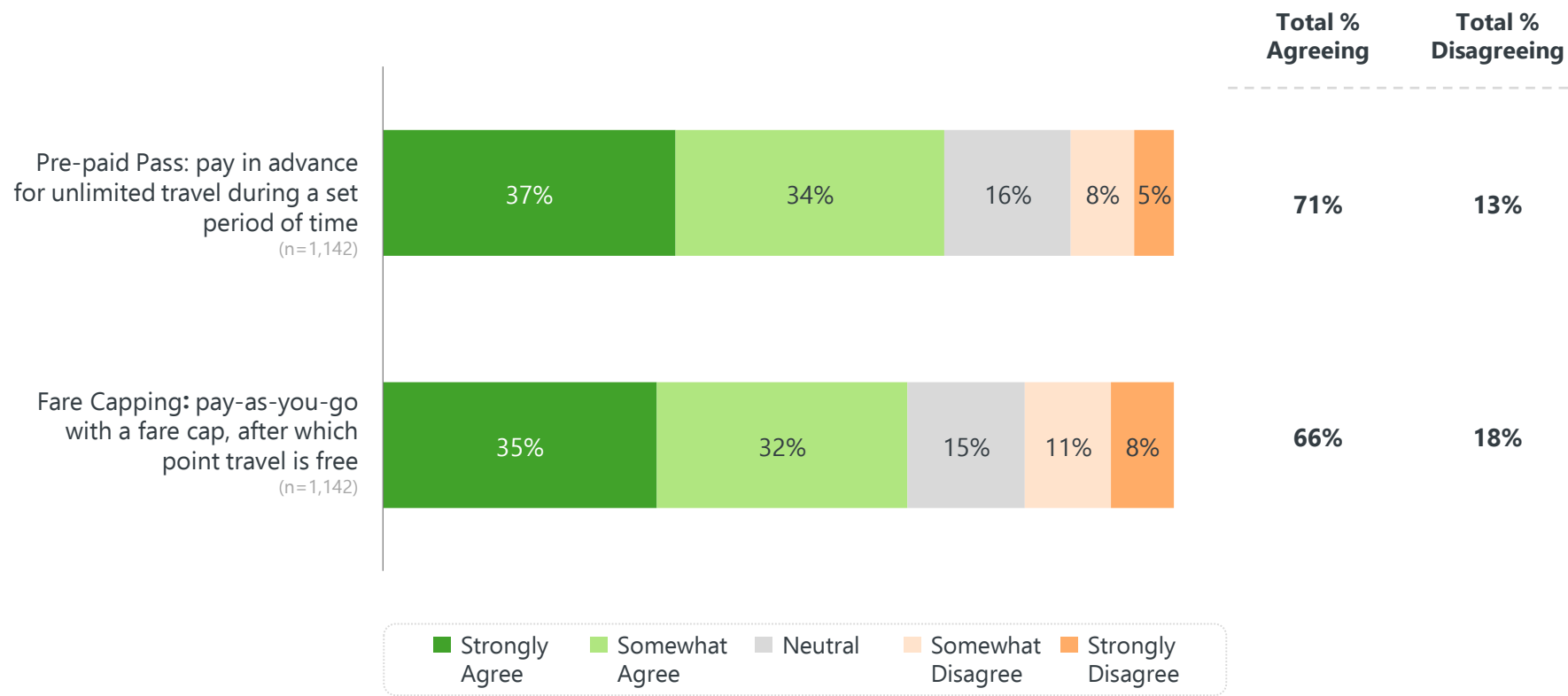
- **Stored Value:** fare is paid for each trip
- **Pre-paid pass:** upfront amount is paid after which travel is fare-free
- **Fare capping:** fare is paid for each trip up to a given threshold after which travel is fare-free

The fare capping threshold would be comparable to a pre-paid pass, although would need to be set a bit higher to pay for all the additional frequent riders who would now be getting a discount.

Fare Product Options

- > The majority of panelists support the two fare product options, with Pre-paid Passes earning slightly more support than Fare Capping.
- > Seven-in-ten panelists agree with the idea of paying in advance for unlimited travel during a set period of time, while two-thirds agree with paying-as-you-go with a fare cap.

Support for Fare Products



TLL Survey data has been weighted.

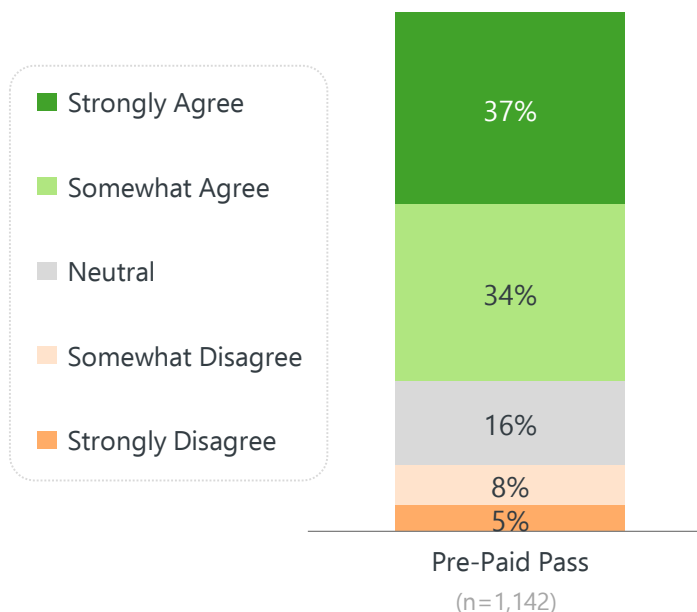
S2Q1. To what extent do you agree or disagree with offering pre-paid passes?

S2Q2. To what extent do you agree or disagree with offering fare capping?

Support for Pre-Paid Pass

- > For panelists who agree with pre-paid passes, it's mainly because they are simple and convenient and good for frequent riders (both mentioned by 24%).
- > On the other hand, three-in-ten of those who disagree with pre-paid passes dislike it because it can be difficult to predict how frequently they'll use transit. Others disagree because it penalizes those who cannot afford to pay upfront (21%) or because they would prefer to pay-per-use (19%).

Level of Support for Pre-Paid Pass



Top Reasons for Agreeing

(unaided mentions among those agreeing)

Base	406
Simple/convenient	24%
Good for daily/frequent riders	24%
Easy to calculate costs with frequency of travel	8%
Will promote transit use	7%
This option will be cheaper for me	6%

Top Reasons for Disagreeing

(unaided mentions among those disagreeing)

Base	120
Hard to predict how frequently I'll travel	30%
Penalizes low-income users who cannot afford to pay upfront	21%
Prefer pay-per-use	19%
Complicated/confusing	10%
Too expensive	7%

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

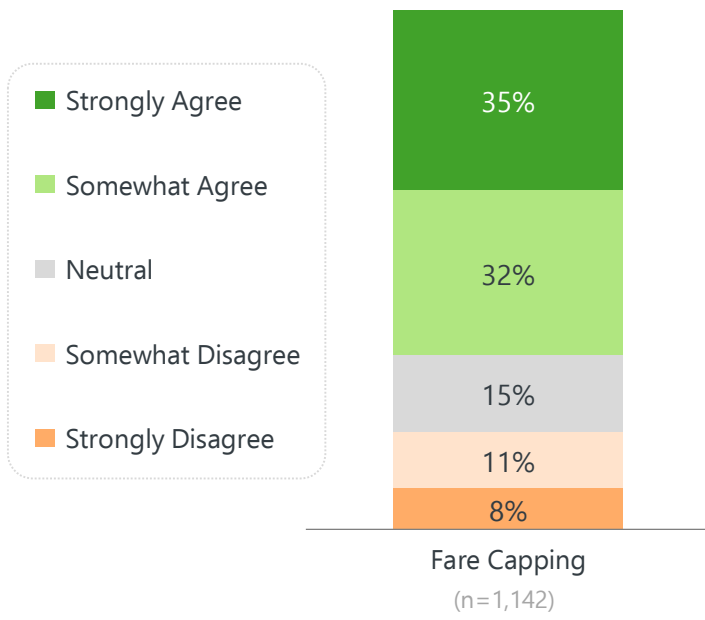
TLL Survey data has been weighted.

S2Q1. To what extent do you agree or disagree with offering pre-paid passes?

Support for Fare Capping

- There are a number of different reasons that panelists agree with fare capping. Broadly one-in-ten believe it's fair, affordable, promotes ridership, and is a good option for commuters and for those who can't afford to pay upfront or can't predict how much transit they'll use.
- For one-quarter of those who disagree with fare capping, it's because they feel it will be more expensive than the current system. Others mention that they like to pay-per-use but recognize that fare capping does not benefit infrequent transit users (18%) or find the option to be complicated/confusing (16%).

Level of Support for Fare Capping



Top Reasons for Agreeing

(unaided mentions among those agreeing)

Base	412
It is fair/makes sense	13%
Promotes ridership/encourages people to use transit regularly	12%
Good option for commuters	10%
Don't need to pay large amount upfront	9%
Affordable	9%
Benefits those who don't know how much transit they will use in a month	8%
Allows riders to use as much as they need/flexibility	7%
Agree, but depends on the price cap/would like to see pricing model	6%

Top Reasons for Disagreeing

(unaided mentions among those disagreeing)

Base	154
Costs more than the current system	23%
Prefer to pay by use/does not benefit low frequency riders	18%
Complicated/confusing	16%
System might be abused/people might share fare cards	8%
Prefer to have a pre-paid pass	7%

Note: only major mentions are shown. Percentages may add to more than 100% given that a respondent can offer multiple reasons.
 TLL Survey data has been weighted.
 S2Q2. To what extent do you agree or disagree with offering fare capping?

› Before sharing their thoughts on expanding customer discounts, panelists were asked to watch a short video and were presented with the following information.

Opportunities to expand customer discounts

Please note this exercise is not a review of externally-provided discount programs.

Current Discounts

TransLink currently offers free fares for:

- Small children (aged 4 and under)

TransLink currently offers a discounted (or Concession) fare to:

- Children & youth (aged 5-18)
- Seniors (aged 65+)
- Eligible persons with a permanent disability who require assistance to use conventional public transit.

Depending on the fare product, these discounted fares are 12 to 70 per cent off the regular adult fare price. Students at public post-secondary institutions also receive discounted transit through U-Pass BC, a program offered by TransLink, the BC Government, and post-secondary institutions.

TransLink's age-based discounts have been around in some form for more than 50 years. These discounts were historically provided to customers who were outside traditional working years and assumed to have less ability to afford full-priced fare. Today, age has become less reflective of an individual rider's ability to pay. Meanwhile, a significant portion of the working age population struggle to pay for their housing and transportation expenses.

What we've heard

TransLink often receives requests to reduce prices for low income individuals. In Phase 1, 58 per cent of residents agreed that fares should be lower for people with less ability to pay than for people with more ability to pay. TransLink recognizes that transit is essential for connecting the region's most economically vulnerable to opportunities and essential services.

Key gaps

In Metro Vancouver, there are around 300,000 people who are considered low-income but not currently receiving externally funded discounts. Currently, the Province offers a discounted transit pass (BC Bus Pass) or equivalent supplement to the most economically vulnerable residents: low-income seniors and individuals receiving disability assistance. TransLink supports this Provincial program by providing these passes to the Province at a discounted rate. Today, low-income customers who do not qualify for these government programs or TransLink's age-based concession discounts are not eligible for discounted fares.

Assuming no external funding is available, any additional discounts may need to come from modest increases to fares for other riders. We want to know what you think. Should TransLink explore ways to expand the discounted fare to low-income residents?

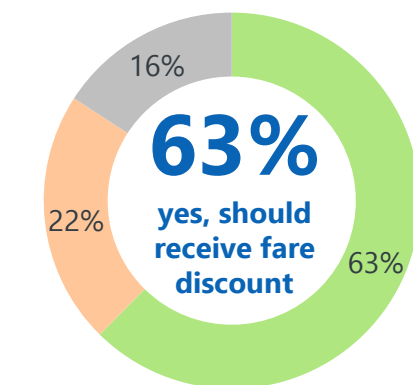
Low Income Cut-Off (LICO)

One way to measure low-income is by using the LICO, or the Low-income Cut-Off (before tax). For 2015, the LICO for a family of one person in Metro Vancouver is \$20,386 up to a maximum of \$53,460 for a family of 7+ persons.

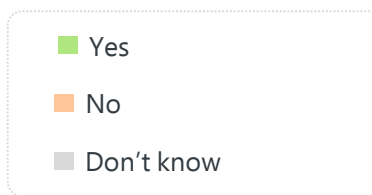
Expanding Customer Discounts to Low-Income Individuals

- › Just under two-thirds of TransLink Listens panelists (63%) believe that customer discounts should be expanded to include low-income individuals who are not currently receiving discounts through existing, external programs. Just two-in-ten panelists oppose expanding the discount program.
- › Opinions are slightly more mixed when it comes to how the costs of expanding the discount program should be covered. Just under half of panelists (47%) support covering the cost by increasing other fares, while 41% oppose the fare increases.

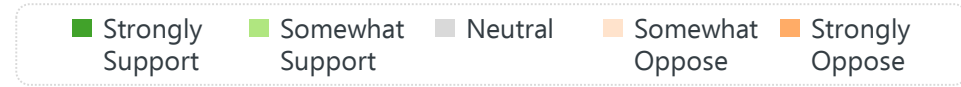
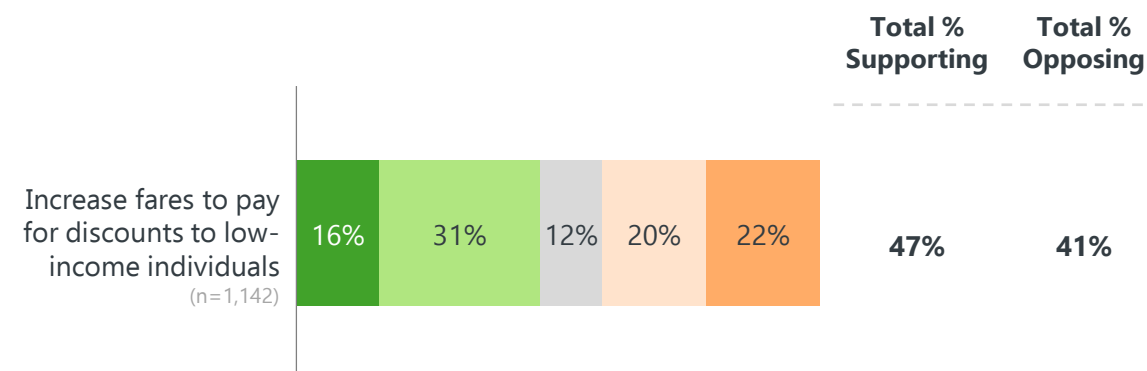
Should Low-Income Individuals Not Receiving Discounted Transit Fares Receive a Fare Discount



(n=1,142)



Support for Covering Cost of Expanding Discount Program by Increasing Other Transit Fares



TLL Survey data has been weighted.

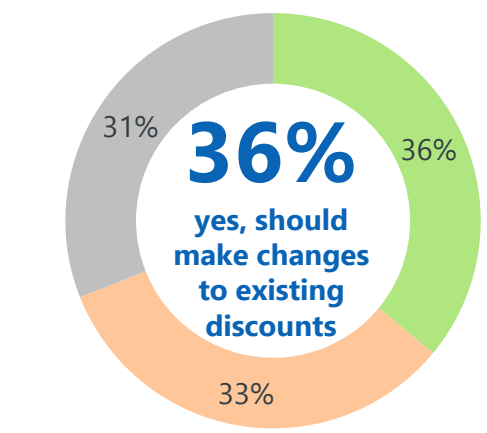
S3Q1. In your opinion, should low-income individuals who are not receiving discounted transit fares through an existing, external program receive a fare discount?

S3Q2. Do you support or oppose increasing fares to pay for discounts to low-income individuals?

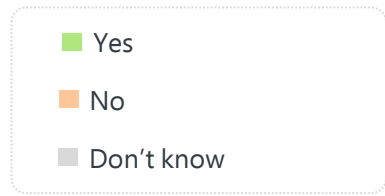
Changing Existing Discounts

- › Opinions are split when it comes to the existing customer discounts. While 36% of TransLink Listens panelists say TransLink should make changes to existing discounts, one-third do not.
- › Among those who feel that changes should be made, the top suggestion is to offer discounts for low income riders (mentioned by 28%).

Should TransLink Make Changes to Existing Discounts



(n=1,142)



Top Suggestions for Changes to Discounts

(unaided mentions among those wanting changes to existing discounts)

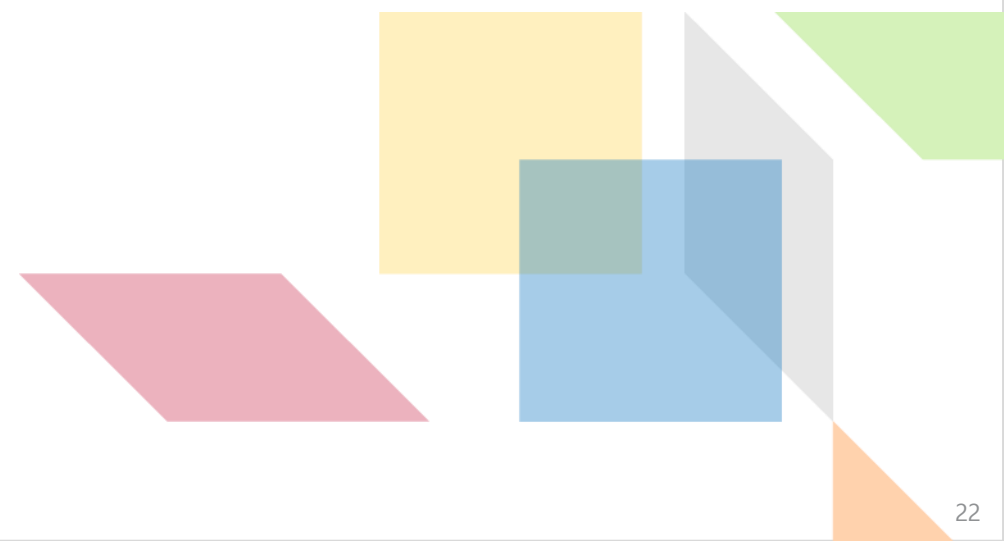
Base	323
Discounts for low income	28%
Lower the price of fares/increase discounts	8%
Do not give age-based discounts	7%
Bring back the Employer Pass Program	6%
Discounts should be covered by TransLink management wages/government (taxes)	6%
Discounts for people with disabilities	6%

TLL Survey data has been weighted.
 S3Q3. Do you think we should make any changes to our existing discounts?
 S3Q4. If yes, what changes to our discounts would you like to see?

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Summary of Findings

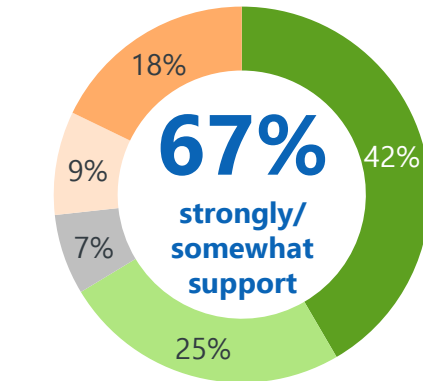
Public Survey



Varying Fares by Distance

- > Two-thirds of respondents to the public survey agree with replacing the current zone system with a fare system that more closely reflects distance travelled.
- > Several groups are less likely than their counterparts to support a distance-based fare system:
 - > Those living in the regions farthest from Vancouver (residents of South of Fraser and the Northeast)
 - > Those who most frequently travel the furthest distances (3 or more zones)
 - > Those who consider transit their main mode of transport, as well as those who use transit on a daily basis
- > These are the groups whose transit costs are most likely to increase as a result of the change to distance-based fares.

Level of Support for Replacing Current Zone System with a Fare System that more closely Reflects Distance Travelled



(n=12,879)

- Strongly Support
- Somewhat Support
- Neither Support nor Oppose
- Somewhat Oppose
- Strongly Oppose

% Supporting Across Subgroups

Region	Vancouver	Burnaby/ New West	South of Fraser	Northeast	North Shore
	71%	69%	60%	64%	70%

By # Zones Most Frequently Travelled	One	Two	Three or More
	70%	69%	59%

By Frequency of Transit Use	Daily	Weekly	Monthly or less
	62%	72%	75%

Main Mode of Transport	SOV	Rideshare	Transit	Bike/Walk
	74%	73%	63%	76%

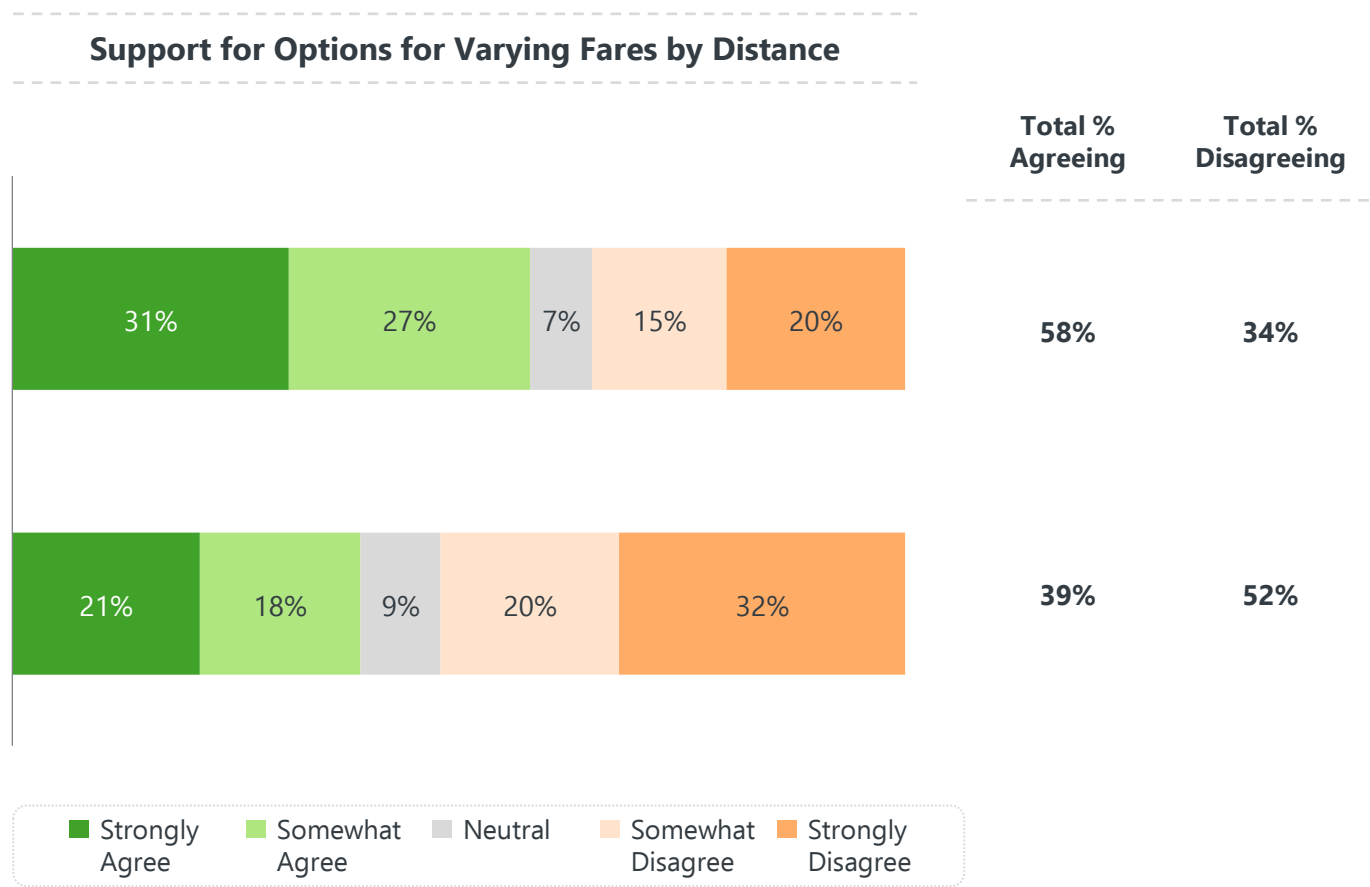
S1Q1. Do you support or oppose replacing the current three-zone system with a fare system that more closely reflects distance travelled?

S1Q2. To what extent do you agree or disagree with Option #1: Fares priced by kilometre on rapid transit and flat fare on bus?

S1Q3. To what extent do you agree or disagree with Option #2: Fares priced by kilometre across the transit system?

Options for Varying Fares by Distance

- > Respondents express a strong preference for having fares priced by KM on rapid transit and keeping the flat fare for bus. Six-in-ten support this option.
- > Only 39% agree with pricing fares by KM across the entire transit system, while 52% disagree with this option.

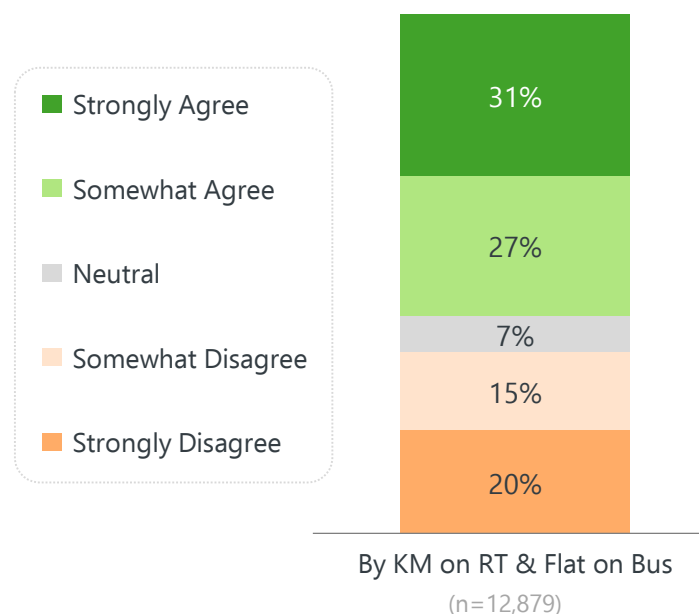


S1Q2. To what extent do you agree or disagree with Option #1: Fares priced by kilometre on rapid transit and flat fare on bus?
 S1Q3. To what extent do you agree or disagree with Option #2: Fares priced by kilometre across the transit system?

Support for Fares Priced By KM on Rapid Transit and Flat Fare on Bus

- › For respondents who agree with pricing fares by kilometre on rapid transit and flat fare on bus, the main reasons are because it's fair (14%), better than the current zone system (12%), and because it avoids having to tap out on buses (10%).
- › Price is one of the top concerns for respondents who disagree with this option. These respondents are concerned that fares will be too expensive and may discourage transit use (19%) or that it will make rapid transit too expensive for those living farther from the city (15%).

Level of Support for Fares Priced by KM on Rapid Transit and Flat Fare on Bus



Top Reasons for Agreeing

(unaided mentions among those agreeing)

Reason	Percentage
Base	3,070
It is fair/makes sense	14%
Better than the current zone system	12%
Don't need to tap out on bus/tap out on bus doesn't work	10%
It is simple/easy to understand	6%
Fares should reflect distance travelled	6%
Agree, but rapid transit will be too expensive for those living farther from city	5%

Top Reasons for Disagreeing

(unaided mentions among those disagreeing)

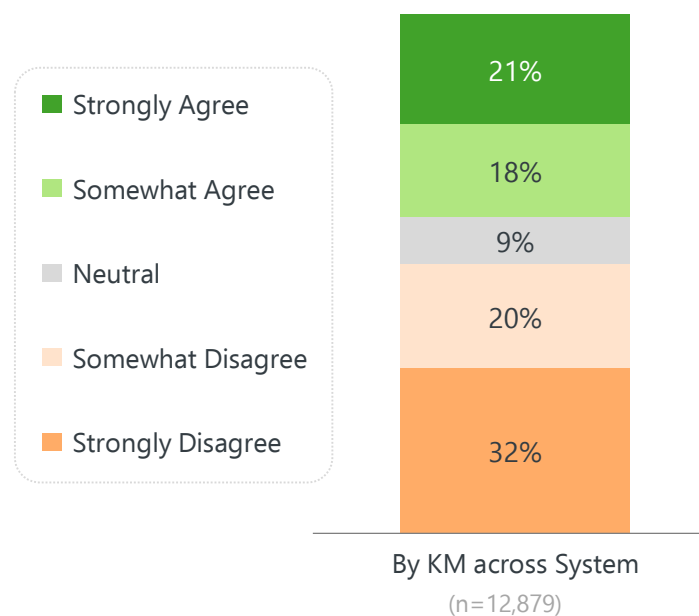
Reason	Percentage
Base	2,715
Prices will be too expensive/discourages transit use	19%
Rapid transit will be too expensive for those living farther from city	15%
Fares should be the same regardless of mode of transport	11%
Should pay for distance travelled on buses too/prefer option 2	9%
Fares should not vary by distance/prefer flat fare across entire transit system	8%
It is unfair	5%
Current system works well/keep the current system	5%
Fares should reflect distance travelled	5%

Note: only major mentions are shown. Percentages may add to more than 100% given that a respondent can offer multiple reasons. S1Q2. To what extent do you agree or disagree with Option #1: Fares priced by kilometre on rapid transit and flat fare on bus?

Support for Fares Priced By KM across Transit System

- › Above all else, respondents who support fares priced by kilometre across the entire transit system agree with this option because it is fair and makes sense (mentioned by 40%).
- › As with option #1, there is concern among those who disagree that prices will be too expensive and may discourage transit use, particularly for those who live farther from the city.

Level of Support for Fares Priced by KM across Transit System



Top Reasons for Agreeing

(unaided mentions among those agreeing)

Base	1,829
It is fair/makes sense	40%
Reflects operation costs	10%
Fares should reflect distance travelled	7%
It is simple/easy to understand	6%
Better than the current zone system	5%
Agree, but don't want to tap out on bus/tap out doesn't work	6%

Top Reasons for Disagreeing

(unaided mentions among those disagreeing)

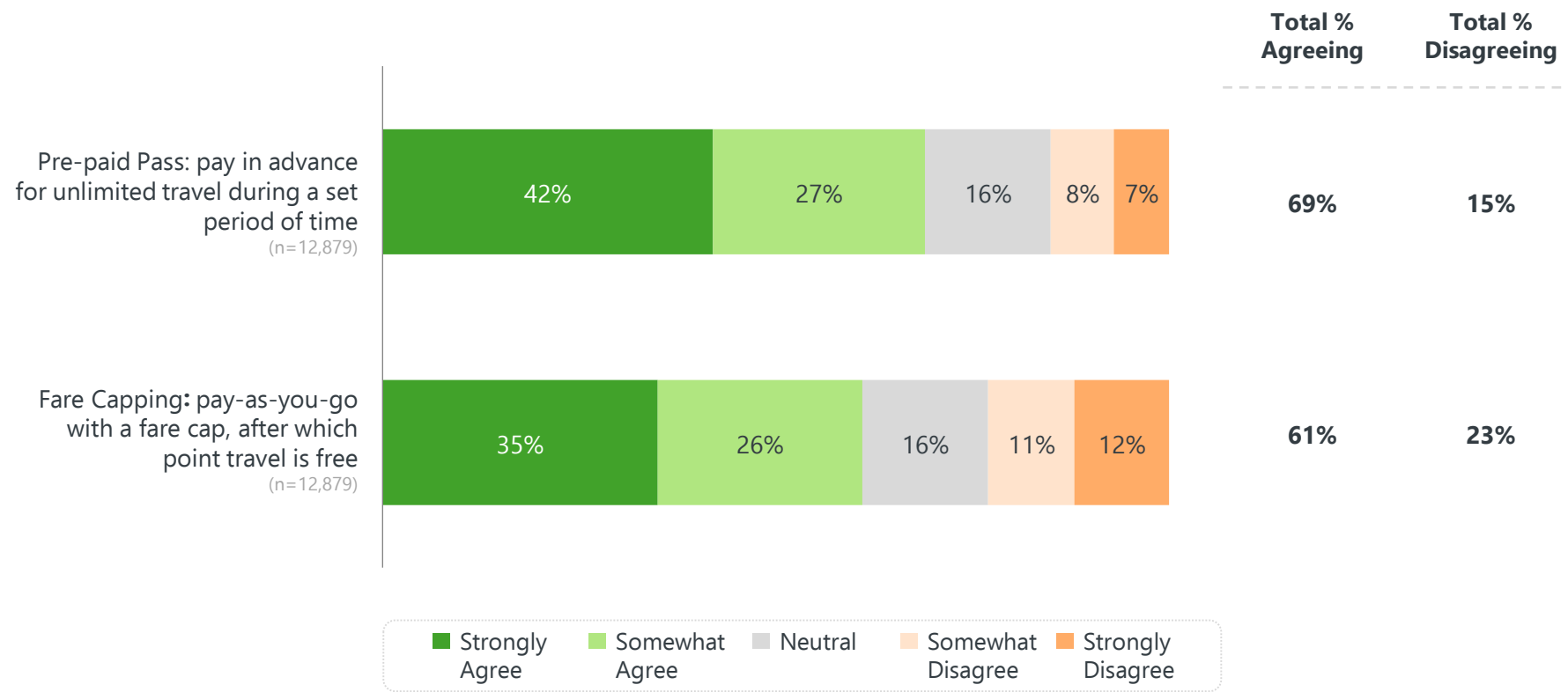
Base	3,085
Prices will be too expensive/discourages transit use	20%
More expensive for those living farther from city	17%
It is unfair	12%
Don't want to tap out on bus/tap out doesn't work	11%
Buses should not be priced same as Rapid Transit/discourages use of buses	9%
Bus should be flat fare/prefer option 1	8%
May pay more for taking an indirect route	7%
Difficult to calculate costs/predict fares	6%

Note: only major mentions are shown. Percentages may add to more than 100% given that a respondent can offer multiple reasons. S1Q3. To what extent do you agree or disagree with Option #2: Fares priced by kilometre across the transit system?

Fare Product Options

- › When it comes to the fare product options, respondents slightly prefer Pre-paid Passes over Fare Capping. Seven-in-ten respondents agree with pre-paid passes, including 42% that strongly agree.
- › Fare capping is still an appealing option among respondents, with 61% agreeing with this pay-as-you-go option.

Support for Fare Products

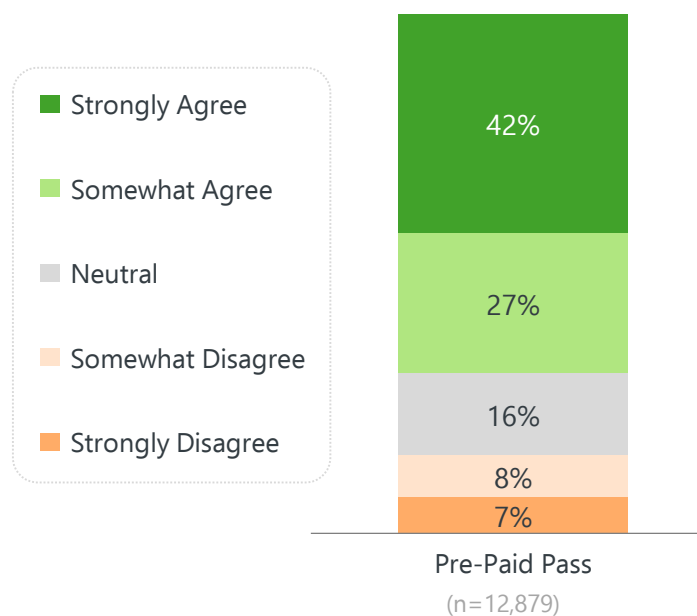


S2Q1. To what extent do you agree or disagree with offering pre-paid passes?
 S2Q2. To what extent do you agree or disagree with offering fare capping?

Support for Pre-Paid Pass

- › Respondents support offering pre-paid passes because it is simple and convenient – mentioned by 22% of those who agree with the option. These respondents also note that pre-paid passes are a good option for frequent transit users (15%).
- › The top reasons that respondents do not support pre-paid passes are that it can be difficult to predict frequency of travel (18%) and that it penalises those who cannot afford to pay upfront (15%).

Level of Support for Pre-Paid Pass



Top Reasons for Agreeing

(unaided mentions among those agreeing)

Base	2,671
Simple/convenient	22%
Good for daily/frequent riders	15%
Easy to calculate costs with frequency of travel	8%
This is what I use now	7%
I like the current system	6%
Will promote transit use	5%
This option will be cheaper for me	5%

Top Reasons for Disagreeing

(unaided mentions among those disagreeing)

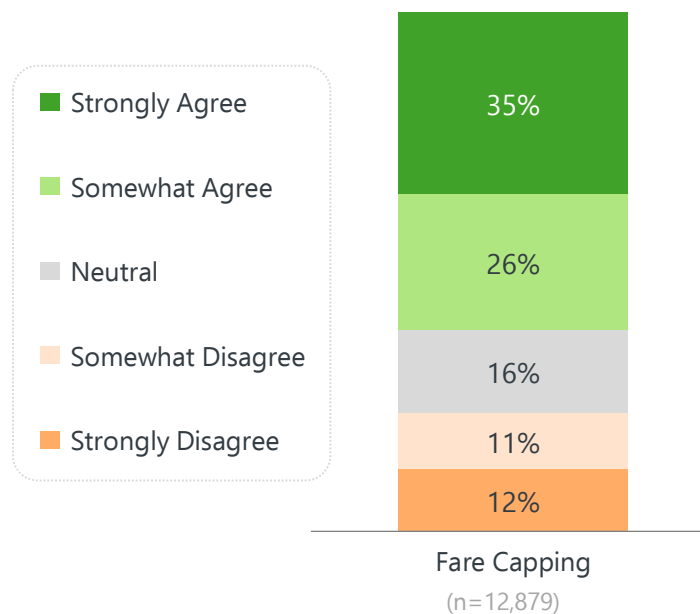
Base	881
Hard to predict how frequently I'll travel	18%
Penalizes low-income users who cannot afford to pay upfront	15%
Too expensive	11%
Complicated/confusing	10%
It is unfair/only benefits certain people	10%
Prefer pay-per-use	6%
Disagree, but I like the current system	8%

Note: only major mentions are shown. Percentages may add to more than 100% given that a respondent can offer multiple reasons.
S2Q1. To what extent do you agree or disagree with offering pre-paid passes?

Support for Fare Capping

- There are a number of reasons that respondents agree with fare capping. Broadly one-in-ten who agree with the option mention that it is fair, allows for flexibility, benefits those who can't predict their transit usage, and will encourage people to use transit regularly.
- Cost is the main reason that respondents disagree with fare capping – 30% disagree because they feel prices will be higher than with the current system.

Level of Support for Fare Capping



Top Reasons for Agreeing

(unaided mentions among those agreeing)

Base	2,617
It is fair/makes sense	12%
Allows riders to use as much as they need/flexibility	10%
Benefits those who don't know how much transit they will use in a month	9%
Promotes ridership/encourages people to use transit regularly	8%
Good option for commuters	7%
Don't need to pay large amount upfront	7%
Good option for less frequent transit users	6%
Agree, but depends on the price cap/would like to see pricing model	6%
Agree, but implement both fare options (fare capping and prepaid)	6%

Top Reasons for Disagreeing

(unaided mentions among those disagreeing)

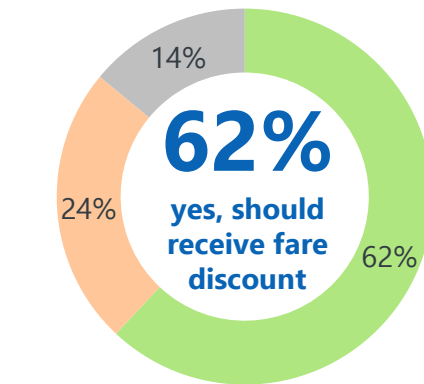
Base	1,133
Costs more than the current system	30%
Complicated/confusing	13%
Prefer to pay by use/does not benefit low frequency riders	12%
I like the current system	6%
Disagree, but depends on the price cap/would like to see pricing model	8%

Note: only major mentions are shown. Percentages may add to more than 100% given that a respondent can offer multiple reasons.
S2Q2. To what extent do you agree or disagree with offering fare capping?

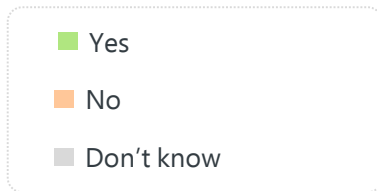
Expanding Customer Discounts to Low-Income Individuals

- > The majority of respondents indicate that low-income individuals who don't currently receive discounted fares through an existing external program should receive a fare discount (62% believe so).
- > However, respondents are more likely to oppose (47%) than to support (40%) increasing other transit fares to cover the cost of expanding the discount program.

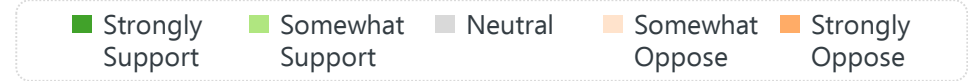
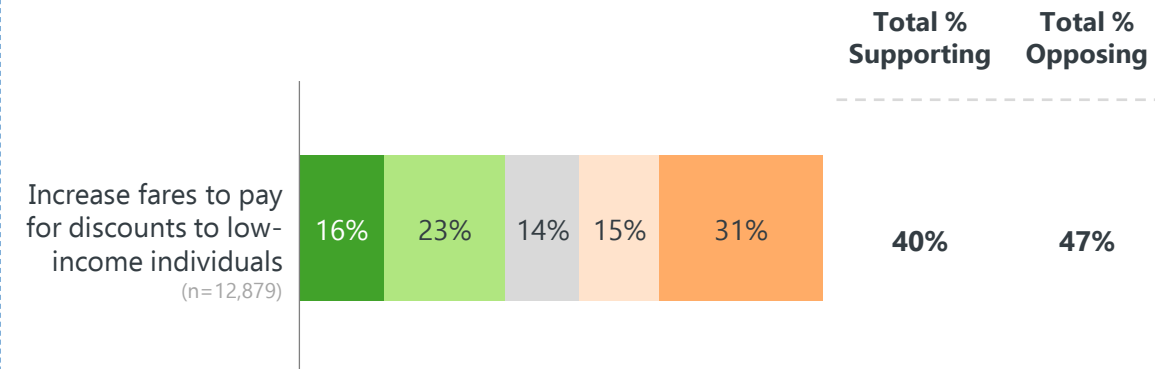
Should Low-Income Individuals Not Receiving Discounted Transit Fares Receive a Fare Discount



(n=12,879)



Support for Covering Cost of Expanding Discount Program by Increasing Other Transit Fares



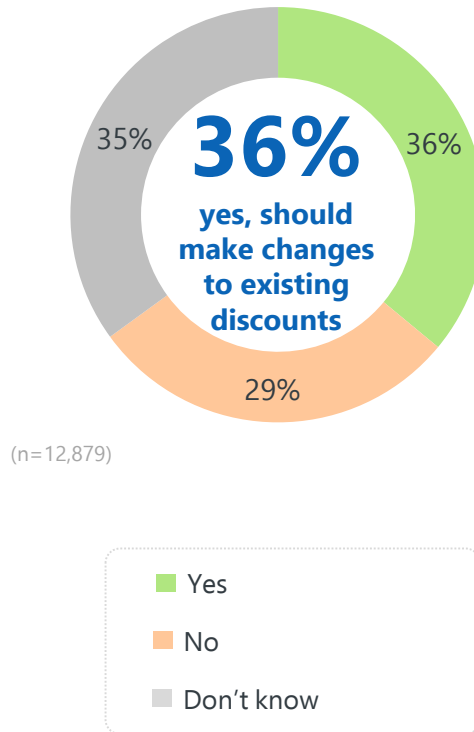
S3Q1. In your opinion, should low-income individuals who are not receiving discounted transit fares through an existing, external program receive a fare discount?

S3Q2. Do you support or oppose increasing fares to pay for discounts to low-income individuals?

Changing Existing Discounts

- › Just over one-third of respondents (36%) believe that changes should be made to the existing customer discounts, while 29% feel they are fine as is. The remaining 35% do not have an opinion either way.
- › Among respondents who would like to see changes, the top mention is to offer discounts for low income riders (23%), while 10% would like to see an overall increase in discounts and lower fares generally.

Should TransLink Make Changes to Existing Discounts

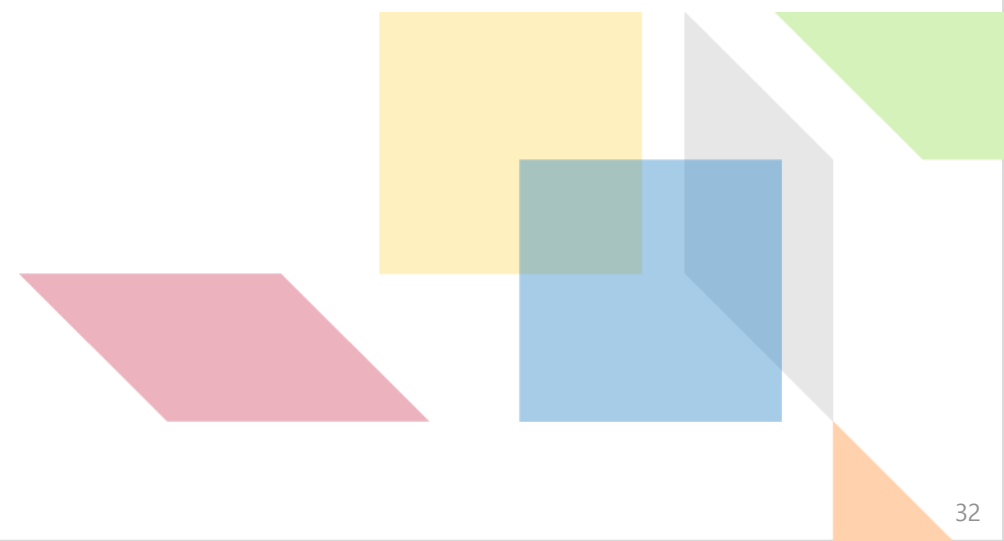


Top Suggestions for Changes to Discounts (unaided mentions among those wanting changes to existing discounts)	
Base	2,664
Discounts for low income	23%
Lower the price of fares/increase discounts	10%
Discounts for children/students	7%
Do not give age-based discounts	5%
Bring back the Employer Pass Program	5%
Discounts for people with disabilities	5%
Discounts for daily/frequent commuters	5%
Discounts for seniors/veterans	5%
Transit should be free for children/students/seniors	5%
Discounts should be covered by TransLink management wages/government (taxes)	5%

A small version of the 3D cube icon, with a green top face and a grey bottom face.

Appendix

Respondent Profile



Respondent Profile


Gender

Age


Region

	TransLink Listens Survey	Public Survey
Base	1,142 %	12,879 %
Gender		
Male	49	48
Female	47	45
Transgender	0	1
Other	<1	1
Prefer not to say	3	5
Age		
Under 35	23	47
35-54	42	33
55 and over	35	18
Region		
Vancouver <i>(includes University Endowment Lands)</i>	30	35
Burnaby/New Westminister	13	20
South of Fraser <i>(Delta, Langley, Richmond, Surrey, Tsawwassen First Nation, White Rock)</i>	35	25
Northeast <i>(Anmore, Belcarra, Coquitlam, Maple Ridge, Pitt Meadows, Port Coquitlam, Port Moody)</i>	13	12
North Shore <i>(Bowen Island, Lions Bay, North Vancouver, West Vancouver)</i>	9	8
Other	-	2

Respondent Profile



Mode of Transportation



Zones Travelled

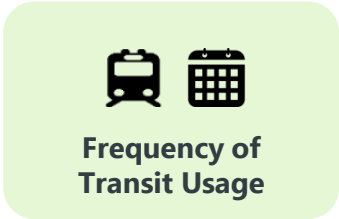


Channel Heard about Survey

	TransLink Listens Survey	Public Survey
	1,142	12,879
	%	%
Main Mode of Transportation		
Drive alone (single occupancy vehicle)	52	16
Public transit	23	66
Carpool/Car with one or more passengers	15	6
Walk	6	7
Bicycle	3	3
Most Frequent Number of Zones Travelled		
One	31	32
Two	37	44
Three	28	21
Four or Five (West Coast Express only)	1	1
Don't Know/Not Applicable	2	2
Channel Heard About Transit Fare Review*		
News media (newspaper article, radio or television news story)	11	29
TransLink Social Media (Twitter, Facebook)	6	26
Online ads	1	14
Bus shelter advertisement	2	13
Word of mouth (Email/heard from family, friend or colleague)	3	11
Newspaper advertisement	3	10
TransLink website	7	8
LCD screen at transit station	1	6
Email from an organization	13	4
TransLink eNewsletter	15	3
Buzzer blog	3	3
Print material/brochure	<1	2
TransLink Listens panelist email	65	1
TransLink booth in the community	1	1
I work for TransLink or subsidiary	<1	1

*Note: only top mentions are shown.

Respondent Profile



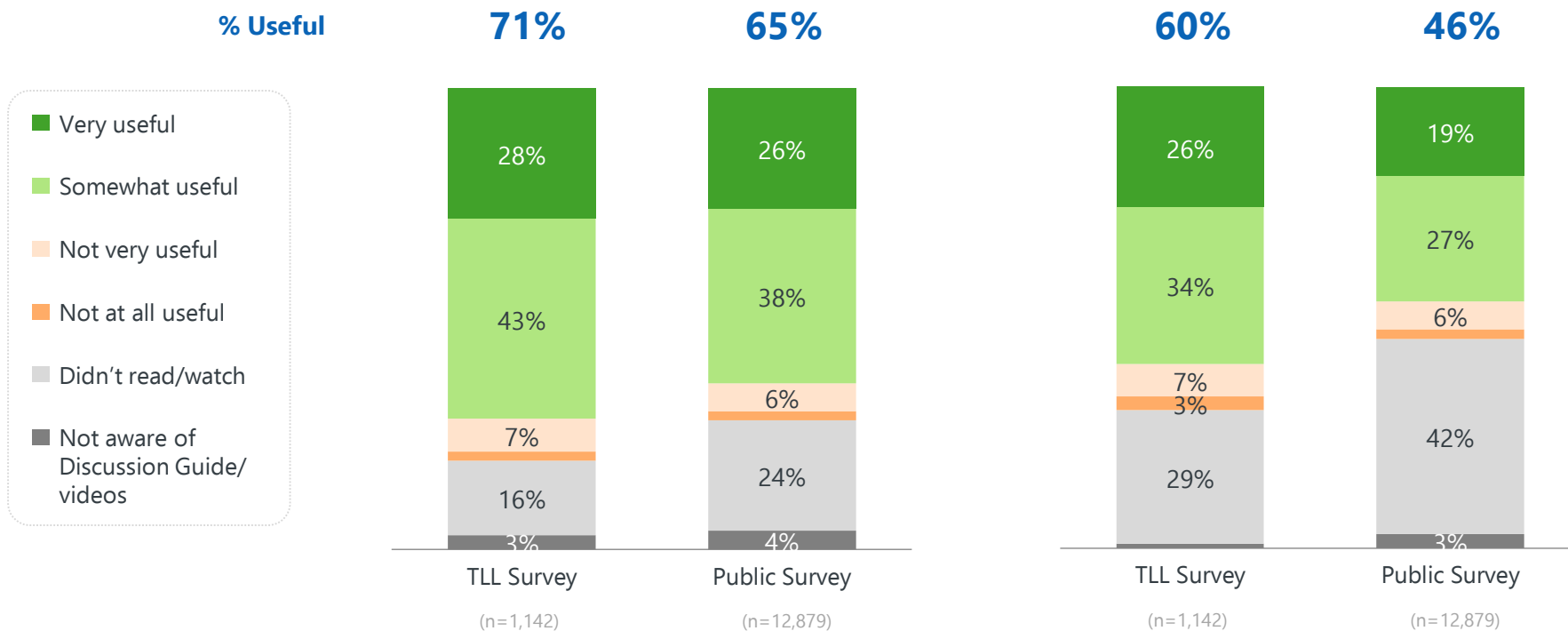
	TransLink Listens Survey	Public Survey
	1,142	12,879
	%	%
Bus Usage		
Every day	15	44
At least once a week	24	25
At least once a month	27	16
At least once a year	24	8
Rarely or never	11	7
SkyTrain Usage		
Every day	12	40
At least once a week	26	27
At least once a month	34	21
At least once a year	23	8
Rarely or never	5	3
SeaBus Usage		
Every day	1	2
At least once a week	2	3
At least once a month	7	11
At least once a year	36	32
Rarely or never	55	53
West Coast Express Usage		
Every day	<1	1
At least once a week	1	1
At least once a month	1	2
At least once a year	7	6
Rarely or never	91	90
HandyDART Usage		
Every day	<1	<1
At least once a week	1	<1
At least once a month	1	1
At least once a year	<1	1
Rarely or never	97	98

Usefulness of Discussion Guide & Information Videos

- Among TransLink Listens Panelists and public survey respondents that read the Phase 3 Discussion Guide and watched the information videos, the resources were found to be useful.
- Relatively speaking, the Discussion Guide was more useful to survey respondents than the information videos.

Usefulness of Discussion Guide

Usefulness of Information Videos



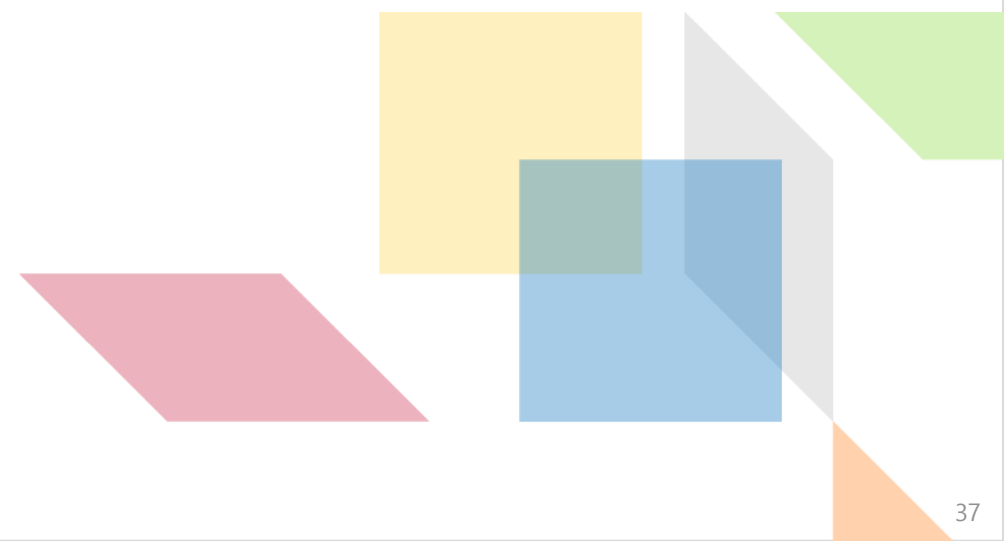
D8. How useful was the Phase 3 Discussion Guide in answering your questions?

D9. How useful were the information videos in answering your questions?

A stylized 3D cube icon with a green top face and a grey bottom face, identical to the one in the header.

Appendix

Questionnaire



**Transit Fare Review
Phase 3 Survey Draft
2017-11-15**

Landing Page

[insert Overview video]

Welcome to Phase 3 of the Transit Fare Review!

In Phases 1 & 2, we heard from more than 43,000 people. Now in Phase 3, we've taken what we heard in previous phases and narrowed down the potential options we are considering for a future fare system.

We want to hear from you! The survey is composed of three sections and will take approximately 15-20 minutes to complete. The three sections are:

1. Fares by **distance**
2. **Fare products** for frequent riders
3. Expanding **customer discounts**

Each section includes an explanatory video and some background information before asking you 2-4 questions.

If you'd like some more information on the options before taking the survey, you can read the Phase 3 Discussion Guide here *[link opens in a new page]*.

FOR TLL: For your responses to be counted, you must complete the entire survey.

FOR PUBLIC: For your responses to be counted, you must complete the entire survey and press Submit.

Section I Fares by distance [New Page]

[insert Distance Option video]

So far in the Transit Fare Review, we've heard that many of you think the current three-zone fare system doesn't work well. And most people would prefer a system where the price you pay more accurately reflects the distance you travel. Compared to the current system, pricing by distance travelled:

- May be more fair: trips of the same length on the same mode of transit cost the same
- May better reflect the pay-for-use principle: the more transit service you use, the more you pay
- May offer more gradual pricing: less of a steep jump in fares

Let's look at the two options for pricing by distance travelled and how they compare to the current fare system.

Option 1: Fares priced by kilometre on rapid transit and flat fare on bus

In this option, bus trips would continue to cost a flat fare, while rapid transit fares would be based on kilometres travelled (rapid transit includes SkyTrain and SeaBus). On rapid transit, a base fare would cover travel for the first few kilometres of a trip, after which the price would increase per kilometre until a maximum fare is reached.

Option 2: Fares priced by kilometre across the transit system

In this option, fares are based on kilometres travelled for both bus and rapid transit (rapid transit includes SkyTrain and SeaBus). A base fare would cover travel for the first few kilometres of a trip, after which point, the price would increase per kilometre until a maximum fare is reached.

Please see the Phase 3 Discussion Guide [\[text w link opens in a new page\]](#) for more information on how we arrived at these two options and how each option may affect the fare you pay.

What do you think about these options? Answer the questions below to let us know.

Questions

1. Do you support or oppose replacing the current three-zone system with a fare system that more closely reflects distances travelled?

1. Strongly support
2. Somewhat support
3. Neither support nor oppose
4. Somewhat oppose
5. Strongly oppose

2. To what extent do you agree or disagree with Option #1: Fares priced by kilometre on rapid transit and flat fare on bus?

1. Strongly agree
2. Somewhat agree
3. Neither agree nor disagree
4. Somewhat disagree
5. Strongly disagree

Why? *(Optional)*

3. To what extent do you agree or disagree with Option #2: Fares priced by kilometre across the transit system?

1. Strongly agree
2. Somewhat agree
3. Neither agree nor disagree
4. Somewhat disagree
5. Strongly disagree

Why? *(Optional)*

Section II Fare products [New Screen]

[insert video]

Today, we offer several fare products for customers to meet different travel needs. Monthly Passes offer discounts for frequent riders, while Stored Value and Compass Tickets offer flexibility for paying as you go. With Compass technology, there are more options for how we could structure fare products to offer benefits to frequent riders.

Let's look at the two options for fare products.

Option 1: Pre-paid Pass: pay in advance for unlimited travel during a set period of time

Like today's Monthly Pass, this option offers unlimited travel over a given time period when purchased in advance. It could be structured in a number of ways, including unlimited trips across a certain distance within set time frames, such as a day, a week, or a month. The Pre-paid Pass is simple and convenient, but only benefits those who can afford to buy it in advance. You also need to know how much you'll travel beforehand to ensure good value.

Option 2: Fare Capping: pay-as-you-go with a fare cap, after which point travel is free

With this option, you pay-as-you-go with Stored Value until you reach a threshold or "cap". All remaining travel within the set time frame—such as a day, a week, or a month—would then be free. Unlike the Pre-paid Pass, Fare Capping does not require an upfront payment. Everyone who travels enough to reach the fare cap benefits from the cost savings. However, to extend savings to all frequent riders, the fare capping threshold would likely need to be set slightly higher than the total cost of a Pre-paid Pass.

Please see the Phase 3 Discussion Guide *[text w link opens in a new page]* for more information on each option for fare products.

What do you think about these options? Answer the questions below to let us know.

Questions

1. To what extent do you agree or disagree with offering pre-paid passes?

1. Strongly agree
2. Somewhat agree
3. Neither agree nor disagree
4. Somewhat disagree
5. Strongly disagree

Why? *(Optional)*

2. To what extent do you agree or disagree with offering fare capping?

1. Strongly agree
2. Somewhat agree
3. Neither agree nor disagree
4. Somewhat disagree
5. Strongly disagree

Why? *(Optional)*

Section III Expanding customer discounts [New Screen]

[insert video]

As part of the Transit Fare Review, we're considering opportunities to expand the customer discounts that TransLink provides, but first we want to hear from you.

TransLink currently offers age-based discounts and discounts for eligible persons with a permanent disability who require assistance to use conventional public transit.

We receive lots of suggestions about ways we could expand our current discounts. A common request is to extend discounted fares to low-income individuals. In Metro Vancouver, around 300,000 people are considered low-income, but not currently receiving discounted transit fares through externally funded programs, like the BC Bus Pass. Today, low-income customers who do not qualify for these programs or TransLink's age-based concession discounts are not eligible for discounted fares.

Please see the Phase 3 Discussion Guide [text w link opens in a new page] for more information on opportunities for expanding customer discounts that TransLink provides.

What are your thoughts on expanding customer discounts? Answer the questions below to let us know.

Questions

- 1. In your opinion, should low-income individuals who are not receiving discounted transit fares through an existing, external program receive a fare discount?**
 1. Yes
 2. No
 3. Don't Know
- 2. One way to cover the cost of expanding our discount program to include low-income individuals is to increase other transit fares. For example, if we extended the current concession fare discount (approximately 20% off the adult fare) to low-income individuals, we would need to increase other fares by 5-10 cents per trip. (Please note a 20% discount is used only as an example.)**

Do you support or oppose increasing fares to pay for discounts to low-income individuals?

 1. Strongly support
 2. Somewhat support
 3. Neither support nor oppose
 4. Somewhat oppose
 5. Strongly oppose
- 3. Do you think we should make any changes to our existing discounts?**
 1. Yes
 2. No
 3. Don't know
- 4. If yes, what changes to our discounts would you like to see? [open ended] (Optional)**

Section IV Demographic Questions [New Screen]

You're almost done. Before you finish, please tell us a bit about yourself so we have a better understanding of who is sharing their feedback.

D1. Which age group do you belong to? [PUBLIC SURVEY ONLY]

1. Younger than 14
2. 14-18
3. 19-24
4. 25-34
5. 35-44
6. 45-54
7. 55-64
8. 65-74
9. 75-84
10. 85+
11. Prefer not to say

D2. How do you describe yourself? [single response] [PUBLIC SURVEY ONLY]

1. Male
2. Female
3. Transgender
4. Identify as _____ [open-ended]
5. Prefer not to answer

D3. What municipality do you live in? [PUBLIC SURVEY ONLY]

1. Anmore
2. Belcarra
3. Bowen Island
4. Burnaby
5. Coquitlam
6. Delta (North)
7. Delta (South)
8. Tsawwassen First Nation
9. Langley (City)
10. Langley (Township)
11. Lions Bay
12. Maple Ridge
13. New Westminister
14. North Vancouver (City)
15. North Vancouver (District)
16. Port Coquitlam
17. Port Moody
18. Pitt Meadows
19. Richmond
20. Surrey
21. Vancouver/University Endowment Lands
22. West Vancouver

23. White Rock
24. Other (Specify: ____)

D4. What mode of transportation do you use most often?

1. Public transit
2. Driving alone
3. Carpooling/Car with one or more passengers
4. Walking
5. Biking
6. Motorcycle/Scooter
7. Other

D5. How often do you use the following transit services? [structure as a grid]

- A. SkyTrain
- B. Bus
- C. SeaBus
- D. West Coast Express
- E. HandyDART

1. Every day
2. At least once a week
3. At least once a month
4. At least once a year
5. Rarely or never

D6. How many fare zones do you travel through on your most frequent trip made on transit?

1. One
2. Two
3. Three
4. Four (West Coast Express Only)
5. Five (West Coast Express Only)
6. N/A
7. Don't Know

D7. How did you hear about the Transit Fare Review? Please select all that apply.

1. Bus shelter advertisement
2. Buzzer blog
3. Email from an organization
4. I work for TransLink, CMBC, BCRTC, West Coast Express, Transit Police or InTransitBC
5. LCD screen at transit station
6. News media (Newspaper article, radio or television news story)
7. Newspaper advertisement
8. Print material (brochure)
9. TransLink booth in the community
10. TransLink eNewsletter
11. TransLink Listens panelist email
12. TransLink website
13. TransLink Social Media (Twitter, Facebook)
14. Word of mouth (email/heard from family, friend or colleague)

15. Online ads
16. None of the above [EXCLUSIVE]
17. Don't recall [EXCLUSIVE]

D8. How useful was the Phase 3 Discussion Guide in answering your questions?

1. Very useful
2. Somewhat useful
3. Not very useful
4. Not at all useful
5. Didn't read Discussion Guide
6. Not aware of Discussion Guide

D9. How useful were the information videos in answering your questions?

1. Very useful
2. Somewhat useful
3. Not very useful
4. Not at all useful
5. Didn't watch the videos
6. Not aware of the videos

Conclusion

Thank you for participating! We value your time and appreciate your input. The results of this survey will be published on www.translink.ca/farereview in spring 2018. Stay tuned for how to get involved in our fourth and final Phase of the Transit Fare Review in 2018.

If you'd like to stay up-to-date on this project and other transportation initiatives across the region sign-up for our community newsletter.

If you have any questions about the Transit Fare Review, head to our **online discussion forum** [link] to ask and have your questions answered.