2014 Survey Research Summary
Fielded online April 3rd-7th, 2014
Weighted sample size = 1007n
Statistically weighted according to the most current education, age, gender and region Census data to ensure a sample representative of the entire adult population of Ontario
Discrepancies in or between totals are due to rounding
Overview of Findings

- Interest and support for more cycling opportunities remains high
- Support for government action to promote cycling – including cycling tourism – is strong
- A strong majority agree that walking and cycling infrastructure should be included in Ontario’s transportation planning
- A very strong majority endorse building a variety of specific walking and cycling options into the transportation system
Comparisons and Highlights

- 32% of Ontarians ride their bike at least monthly
- A majority (54%) want to ride their bike more often
- Close to half (45%) favour more transportation choices for getting to work and school and almost half (50%) would like more choice for shopping and errands.
- Economic factors are driving demand for more opportunity to cycle and more choice for individuals who are: younger, lower income, and urbanized.
Cycling in Ontario
## Cycling in Ontario

<table>
<thead>
<tr>
<th>Percentage who cycle...</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Every day or almost every day</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Weekly or almost weekly</td>
<td>13%</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>Monthly or almost monthly</td>
<td>12%</td>
<td>14%</td>
<td>15%</td>
</tr>
<tr>
<td>Rarely/never/don’t own a bike</td>
<td>72%</td>
<td>64%</td>
<td>68%</td>
</tr>
</tbody>
</table>
Cycling in Ontario

- 4% of Ontarians say they ride a bike daily or almost daily, and an additional 28% report riding weekly or monthly.

- The numbers who say they ride daily are lowest in the surrounding GTA (1.5%) and highest in Toronto (5.7%), Eastern Ontario (5.2%) and urban centres throughout the province (5.1%).
Cyclists are also drivers

<table>
<thead>
<tr>
<th>Percentage of Ontarians who Drive a Car, and are also Cyclists</th>
<th>Total Sample</th>
<th>Cyclists (at least weekly)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Every day or almost every day</td>
<td>69%</td>
<td>63%</td>
</tr>
<tr>
<td>Weekly or almost weekly</td>
<td>11%</td>
<td>13%</td>
</tr>
<tr>
<td>Monthly or almost monthly</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Rarely or never</td>
<td>18%</td>
<td>20%</td>
</tr>
</tbody>
</table>
Comparing drivers and cyclists

- Driving a car (at least weekly) is just about as common for daily or weekly cyclists (76%) as it is for the total population (80%)
- Riding a bike (at least weekly) is just about as common for daily drivers (15%) as it is for the total population (17%)
- Comparisons underline an important fact behind the so-called ‘war’ between drivers and cyclists – they are largely the same people.
Impressions of drivers and cyclists

Overall impression of drivers when it comes to how they behave toward cyclists and pedestrians

41%

Overall impression of cyclists when it comes to how they behave towards motorists and pedestrians

43%

59%

57%
Impressions of drivers and cyclists

Overall impression of drivers better, worse or the same as two years ago?

- Better: 14%
- Same: 57%
- Worse: 27%

Overall impression of cyclists better, worse or the same as two years ago?

- Better: 10%
- Same: 62%
- Worse: 25%
Impression of drivers and cyclists

- Opinion toward the behaviour of both groups is generally negative, and it has tended to become more negative in recent years
  - Regular cyclists have a (slightly) more negative attitude toward drivers than daily drivers (62% compared to 55% of drivers)
  - Daily drivers have a more negative attitude toward cyclists than regular cyclists (58% compared to 42% of cyclists)
- The good news? Cyclists and drivers see a problem in the behaviour of both groups
Demand for Cycling in Ontario
Cycling/Demand

- A majority of Ontarians (54%) indicated that they would prefer to cycle more often

- Groups that expressed the strongest interest in cycling more included:
  - Regular cyclists (65%)
  - Individuals aged 35-49 (65%)
  - Household income over 100k (60%)
  - Daily car drivers (56%)
Growth in Cycling/Demand

54% of Ontarians want to cycle more

32% of Ontarians cycle
If you rode a bicycle more often would you do more...

- Recreational cycling? 96%
- Tourism in other parts of Ontario? 48%
- Cycling for shopping, errands and appointments? 47%
- Cycling to get to and from work or school? 42%
Which of the following would encourage you to cycle more often?

- Bicycle lanes/trails to places I want to go: 68%
- More/better cycling infrastructure...such as protected bike lanes and paved shoulders: 67%
- Lower speed limits on residential streets: 33%
- Lower speed limits on main/arterial routes: 33%
- Laws requiring motorists to leave one meter of space when passing cyclists: 53%
- Showers and bicycle parking facilities at work, school, etc.: 38%
- Opportunity to learn more about safe riding skills: 27%

StratCOM Strategic Communications
Measures that would encourage individuals to cycle more often

- More bike lanes and trails (68%) and better infrastructure (67%) are key measures to encourage more frequent cycling, especially:
  - In Toronto (bike lanes/trails 80%, better infrastructure (73%)
  - 18-34 years of age (bike lanes/trails 77%, better infrastructure 76%)
- A majority (53%) would be likely to ride more if there was a one meter law:
  - 62% in Toronto and 61% for those 18-34 years of age.
Is the potential to lower your transportation costs a factor that would encourage you to ride your bicycle more often?

- Yes, definitely: 15
- Yes, probably: 24
- Don't Know: 4.3
- No, probably not: 57
Is the potential to lower your transportation costs a factor that would encourage you to ride a bike more often?

- Yes definitely/yes, probably (39%)
  - Regular cyclists (68%)
  - 18-34 year of age (59%)
  - Toronto (48%)
  - Household income < $50K (45%)
  - Urban/City (45%)
How important is it for you to have more transportation choices...

<table>
<thead>
<tr>
<th></th>
<th>Very/Somewhat important</th>
<th>Not important</th>
</tr>
</thead>
<tbody>
<tr>
<td>... to travel to work?</td>
<td>45%</td>
<td>50%</td>
</tr>
<tr>
<td>... for shopping and errands?</td>
<td>49%</td>
<td>47%</td>
</tr>
</tbody>
</table>
How important is it for you to have more transportation choices…

- To travel to work (45%)
  - Regular cyclists (64%)
  - Toronto (64%)
  - 18-34 year of age (62%)
  - 35-54 years of age (60%)
  - Household income < $50K (48%)

- For shopping and errands (50%)
  - Regular cyclists (71%)
  - Toronto (67%)
  - 18-34 years of age (61%)
  - Household income <$50K (55%)
Support for Government Action
Government Action

The Provincial Government should ...

- Give tax breaks to employers who build cycling facilities for their employees (56% agree)

- Invest in infrastructure so more people can ride a bike more often (68% agree)

- Earmark a portion of road spending to meet the needs of cyclists who also use Ontario’s roads (62% agree)

- Invest in a new cycling education program (60% agree)
Walking and cycling infrastructure should be included in Ontario’s long-term plan to invest $30 billion to improve transportation.

- Yes, agree: 70
- No, disagree: 17
- Not sure/don’t know: 13
Do you support/oppose including the following measures in Province’s plan to build new transportation infrastructure?

- Making it more convenient to walk from home to public transit: 89%
- Convenient and secure parking and storage for bikes at transit hubs such as bus stations: 89%
- Making it safer and more convenient to ride my bike from home to public transit: 86%
- Adding additional 'bike-friendly' rail cars - with space for bicycles - to GO Trains: 83%
- Making it more convenient to take my bike on the bus: 77%
- Making it possible to take my bike on transit at any time of the day: 72%
A Cycling Legacy
Investment in the Pan Am Games should include more bike lanes and paths and serve as a permanent “legacy” or public benefit resulting from the games.
## Why Take Action?

<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
</tr>
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<tbody>
<tr>
<td>70%</td>
<td>13%</td>
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</table>

More people would ride bikes if there was more and better cycling infrastructure, such as bike lanes and paved shoulders.

When people ride a bike regularly, they are healthier and put less strain on the healthcare system… the provincial government should invest in cycling infrastructure so that more people could ride a bike more often.

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Transportation costs are a major financial burden. If someone's only or best way to get to work or go shopping is a bike, they should have the option to ride their bike and ride it in safety.

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Getting many more Ontarians riding bikes helps everyone, not just cyclists.

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Support for Government Action

- Support for measures to encourage cycling ranges from a clear majority to overwhelming endorsement.
- Two thirds or more endorse a variety of key arguments in favour of promoting cycling in Ontario.
- Typically support/agreement with pro-cycling action or arguments outnumbers opposed/disagree by a ratio of three or more to one.
Cycling Tourism
Some provinces, including Quebec, have seen significant benefits from the growth of cycling tourism. Should Ontario do more to promote cycling tourism?
Would you agree or disagree that Ontario should provide more financial support to municipal and regional bike tourism initiatives?

- Agree: 61
- Neutral: 23
- Disagree: 15
Conclusions

- More people want to ride more often
- Safety and infrastructure are keys to increased cycling
- Widespread understanding of the multiple benefits of cycling underpins support for government action
- A strong majority endorse the inclusion of cycling and walking infrastructure in long term transportation planning.
- Very strong support for specific measures to make cycling and walking integrated parts of the transportation system
- Cycling is a social/economic equality issue. Lower cost and increased access to transportation options is a driver of demand for increased cycling opportunity
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