



Calgary



2019 Green Line Survey

Detailed Report

April 25, 2019

ENVIRONICS
RESEARCH

Prepared for The City of Calgary by:

Contact:

Tony Coulson
Group Vice President
Environics Research
403-613-5735

tony.coulson@environics.ca

Nicole Pageot
Senior Research Associate
Environics Research
437-925-9384

nicole.pageot@environics.ca

Table of Contents

<u>Sections</u>	<u>Pages</u>
i. Executive Summary	3-4
ii. Methodology	5
iii. Issue Awareness & Familiarity	6-13
iv. Likelihood of Use & Travel Behaviour	14-18
v. Perceptions & Impacts of the Green Line	19-28
vi. Information Needs	29-31
vii. Regional Differences	32-37
viii. Respondent Demographics	38-40

Executive Summary

Awareness & Familiarity of the Green Line LRT

Traffic and transportation issues are not the most pressing top-of-mind concerns in Calgary. When prompted, however, a majority has heard about transit projects across the city, with the Green Line LRT being the most cited example (41% of all respondents).

Familiarity with the Green Line is not deep: only 6% feel *very* familiar with the project with an additional 39% *somewhat* familiar. Familiarity is highest among those in the affected area* (58% very or somewhat). One quarter (26%) of those from the affected area are unaware they live in that construction area.

Despite low familiarity, fewer than three in ten of all Calgarians (26%) are interested in accessing more information about the Green Line, with most of those interested in the timing of the project and where the LRT will be situated. Most prefer to access this information through The City's or Calgary Transit's websites, though there is also strong interest in other traditional signage and media sources.

Of those who recall hearing positive information about the Green Line (65% of those familiar with the Green Line), most cite convenience and accessibility benefits, followed by information on where the line will be situated. Of the 16% who recall negative information, concerns about cost and investment lead the list.

*The affected area includes communities at or near the Green Line's planned location

Executive Summary

Perceptions & Impacts of the Green Line LRT

One quarter of Calgarians (24%) anticipate the Green Line will have a *big* improvement or *some* improvement to their quality of life, a figure higher among those from the affected area, those in Southeast Calgary and current regular transit users. Majorities of these Calgarians say the Green Line will make commuting easier or more accessible. Others who don't anticipate any improvement to their quality of life (46%) frequently say they simply won't use the Green Line.

Four in ten Calgarians (37%) say they are at least somewhat likely to use Stage 1 of the Green Line, and this is higher among younger Calgarians, those who use public transit as their primary mode of transportation, those in the affected area, and those with greater familiarity with the Green Line. Advanced analysis reveals that intent to use the Green Line is highly correlated to perception of personal impact of the Green Line (including personal impacts during and after construction, perceived impact on quality of life, and stated likelihood of using the Green Line), as well as frequency of current transit use.

There is some anticipation of negative construction impacts of Stage 1 for the city (46% negative), with top concerns relating to traffic, transit operation and community interruption. Upon completion of Stage 1, nearly half (44%) anticipate a positive personal impact from the Green Line, with those from the affected area more likely than others to say the effect will be *very* positive. Nine in ten (87%) anticipate a positive impact for the city as a whole. The top reason for anticipating positive impacts is the easing of traffic congestion, with more commuting options also prominent.

Methodology

EnviroNics conducted a telephone survey on behalf of The City to understand awareness and attitudes towards the Green Line LRT.

The telephone survey was conducted with a randomly selected sample of 802 Calgarians aged 18 years and older, using both landline and cell phone sample. The survey was in field from February 22 to March 6 2019. The average interview length was 11.5 minutes. The margin of error for a sample of 802 is ± 3.5 percentage points, 19 times out of 20.

Sampling quotas were in place to collect feedback from a range of characteristics, including age, region (quadrant) and gender. An oversample of 220 Calgarians from the affected area* was included in the sampling plan. Final data were weighted to ensure the overall sample reflected that of the actual Calgary population aged 18 and over as per the 2016 Census (including by age, gender and city quadrant).

All results were tabulated by quadrant, affected area, gender, age, home ownership, household income, education, number of people in the household, children in the household, transit users in the household, primary mode of transportation, frequency of transit use, unprompted mention of the Green Line, familiarity of the Green Line, perceived impact of the Green Line on quality of life, perceived personal impact of Stage 1 completion, and likelihood of using the Green Line. Noteworthy differences are highlighted throughout this report.

Results in this report may not add to 100% due to rounding or multiple responses.

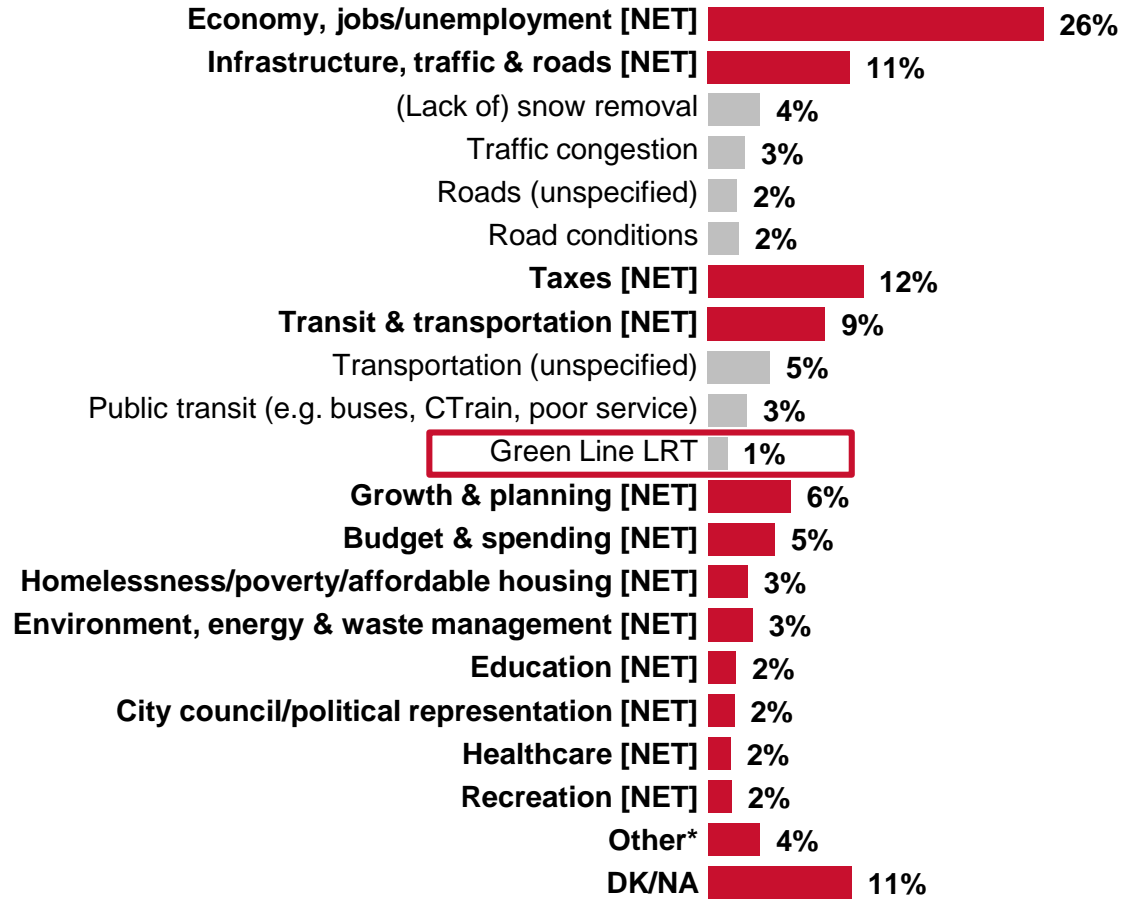
The affected area includes the following communities: Beltline, Crescent Heights, Douglasdale/Douglas Glen, Downtown (including Commercial Core, West End and East Village), East Shepard Industrial, Inglewood, Lynnwood, McKenzie Towne, Millican, Mount Pleasant, Ogden, Prestwick, Quarry Park, Ramsay, Riverbend (including South Hill Mobile Home Park), and Tuxedo Park.



Issue Awareness & Familiarity

Most Important Local Issue

While economic issues are top of mind in Calgary, concern about traffic and transportation are also prominent. The Green Line surfaces as the most important issue for only 1% of respondents.



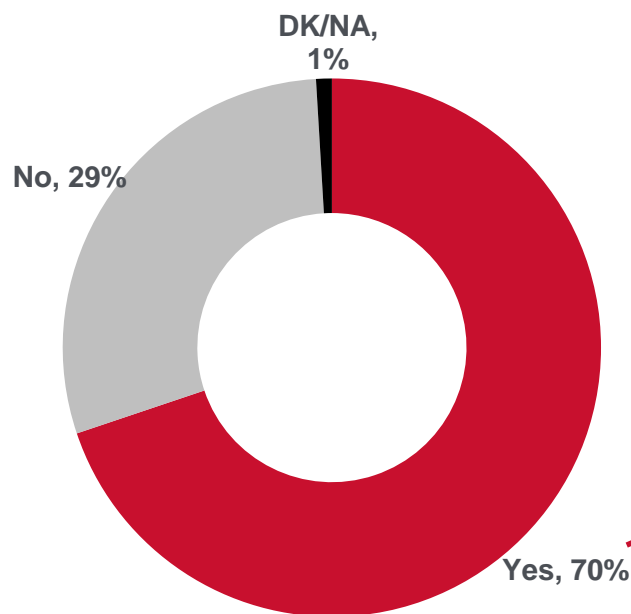
Q1. What, in your opinion, is the single most important issue facing the City of Calgary today? [Unaided responses] Base size: All respondents (n=802)

*Responses comprising fewer than 2% of the total are grouped in the 'other' category, with the exception of a specific mention of Green Line LRT

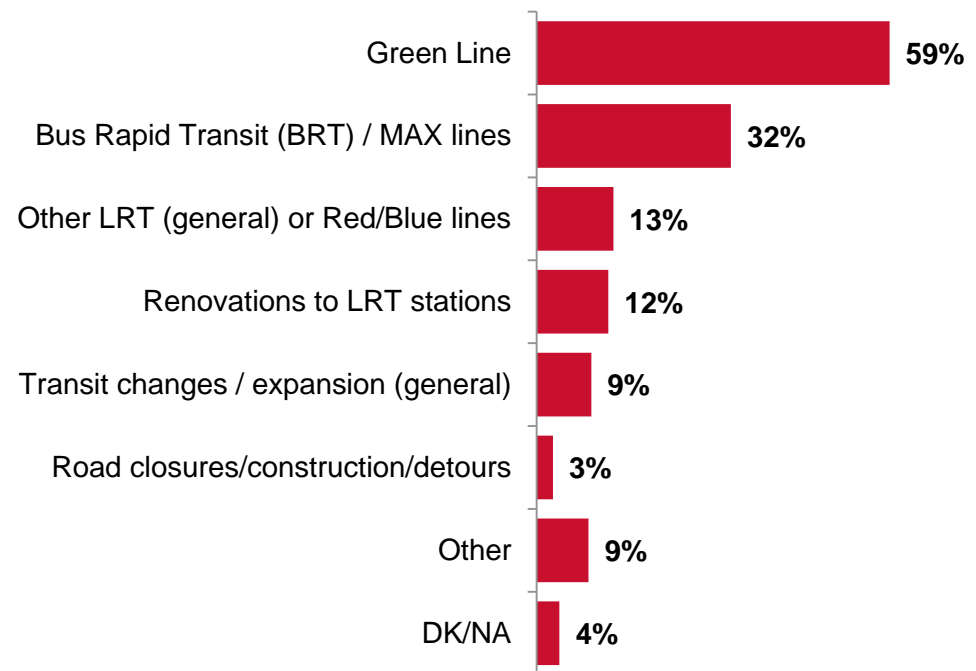
Awareness & Recall of Transit Projects

Seven in ten say they have heard about transit projects in Calgary, with the Green Line being the most mentioned project.

Heard of Transit Projects



Types of Projects Heard About (n=599)



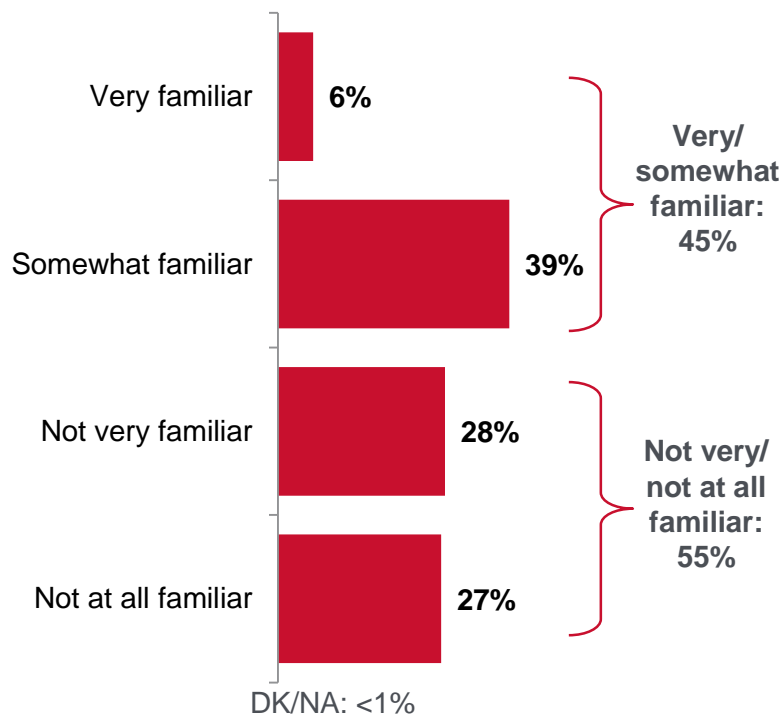
Q5. Have you heard of, or read about, any transit projects currently underway or planned in the City of Calgary? Base size: All respondents (n=802)

Q6. What transit projects in Calgary have you heard of or read about? [Unaided responses] Base size: Those who have heard/read about transit projects in Q5 (n=599) [Multiple responses permitted]

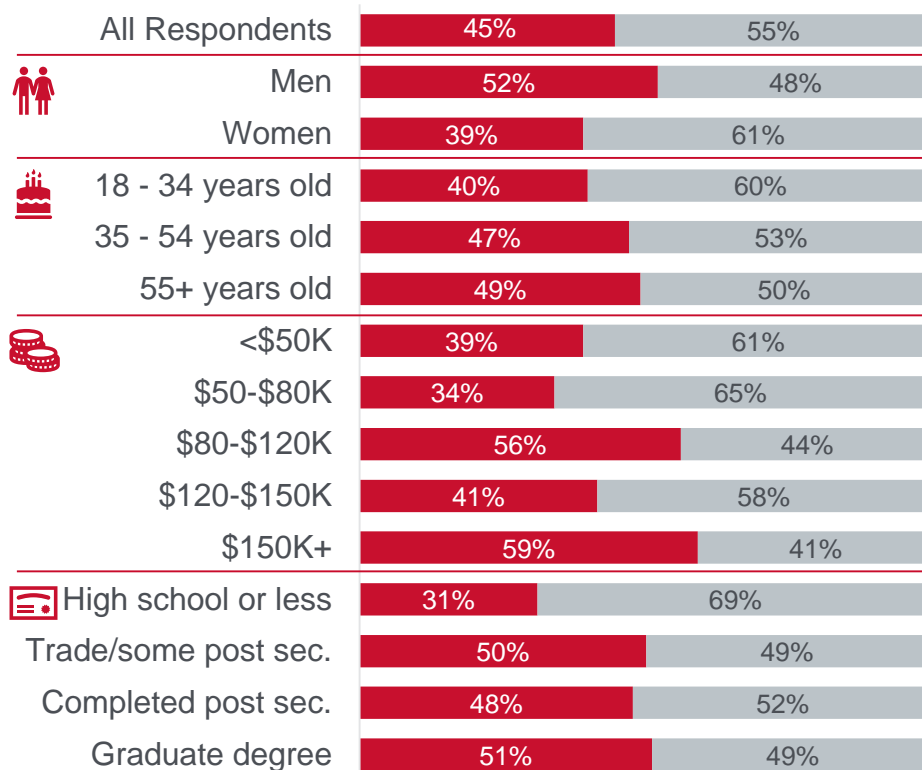
Familiarity of Green Line

When prompted, nearly half say they are somewhat (39%) or very (6%) familiar with the Green Line project. One in four are not at all familiar. Familiarity is highest among men and those with higher household income and education levels.

Total Sample



Familiarity by Demographics

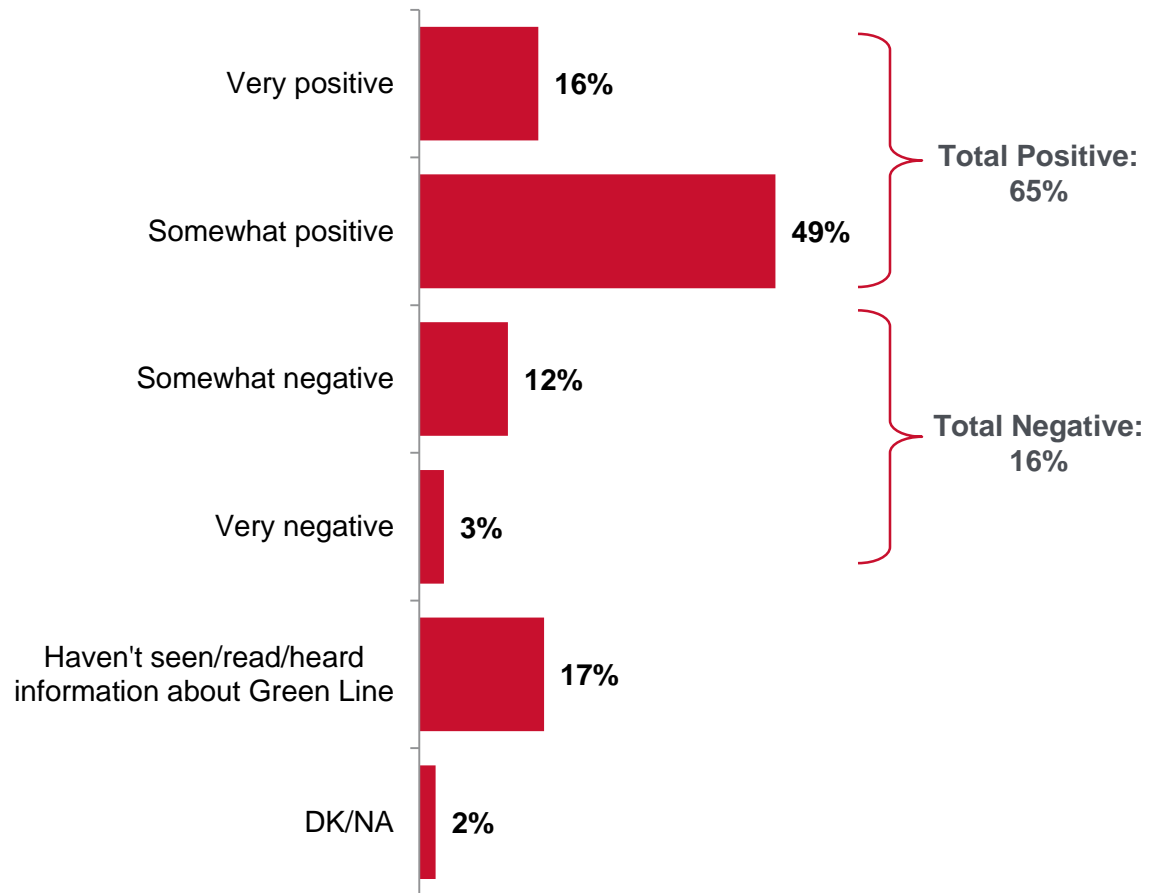


■ Very/somewhat familiar ■ Not very/not at all familiar

Q7. The Green Line is Calgary's next LRT line. How familiar would you say you are with this transit project? Are you... Base size: All respondents (n=802)

Sentiment of Green Line Information

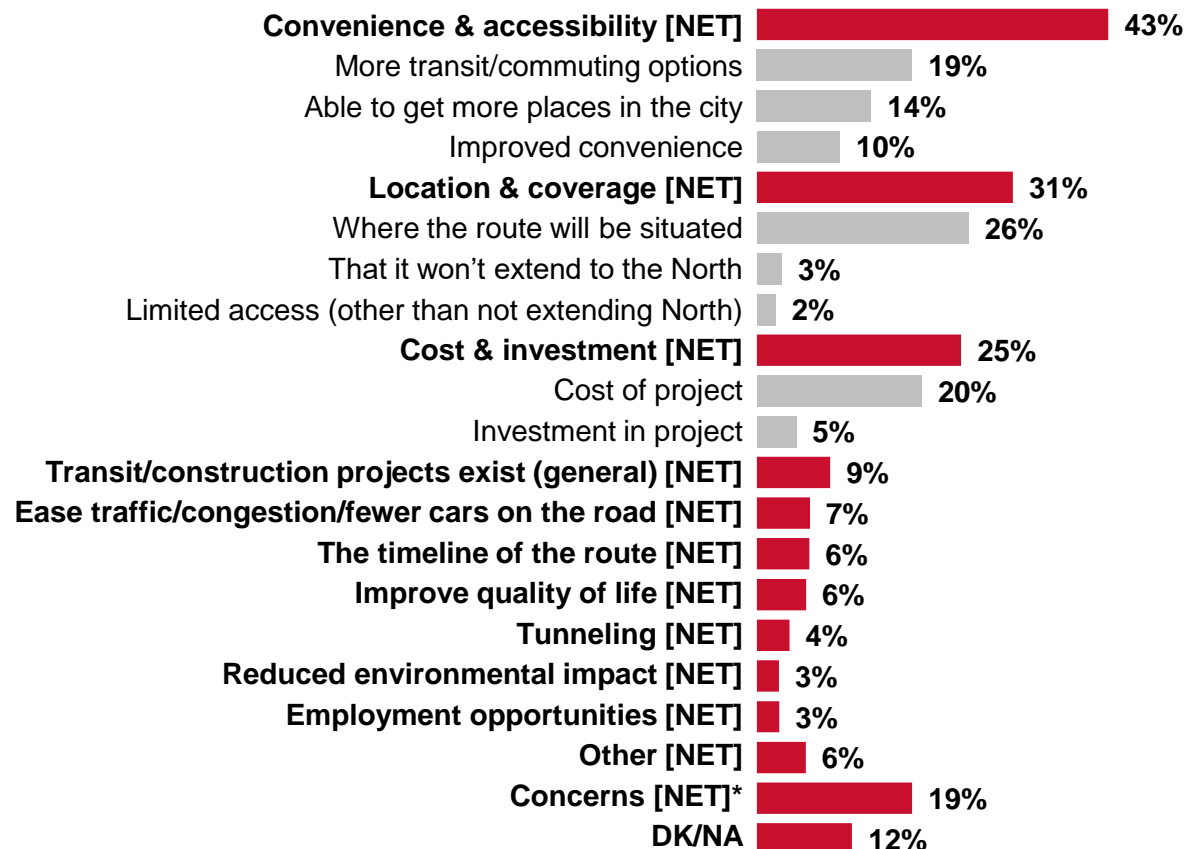
Among those with any familiarity (very, somewhat, not very), two thirds say they have heard positive information about the Green Line.



Q8. Thinking about all of the information you have seen, read or heard about the Green Line LRT, overall would you say that what you are seeing/reading/hearing about this project is... Base size: Those who are very, somewhat or not very familiar with Green Line in Q7 (n=616)

Recall of Green Line Information (Positive)

Those who have heard positive information about the Green Line most often speak to benefits of convenience and accessibility.

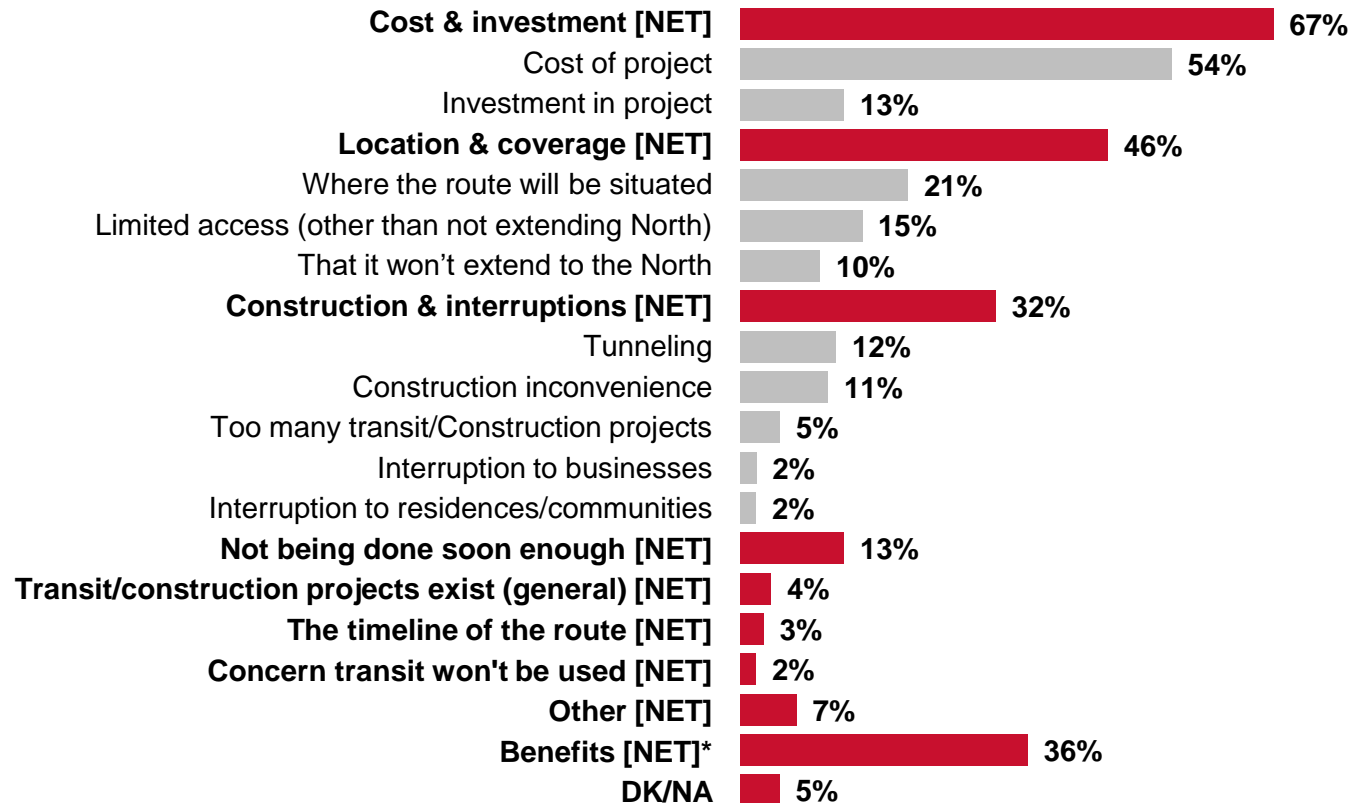


Q9. What kinds of things have you heard or read about the Green Line LRT? [Unaided responses] Base size: Those who have heard very or somewhat positive information about Green Line in Q8 (n=393) [Multiple responses permitted]

**Note: Despite having rated the information they've heard about Green Line as positive overall, 19% of these respondents reported having read or heard something of concern.*

Recall of Green Line Information (Negative)

Those who have heard negative information about the Green Line most often speak to cost of the project, with coverage of the line and construction concerns also top issues.



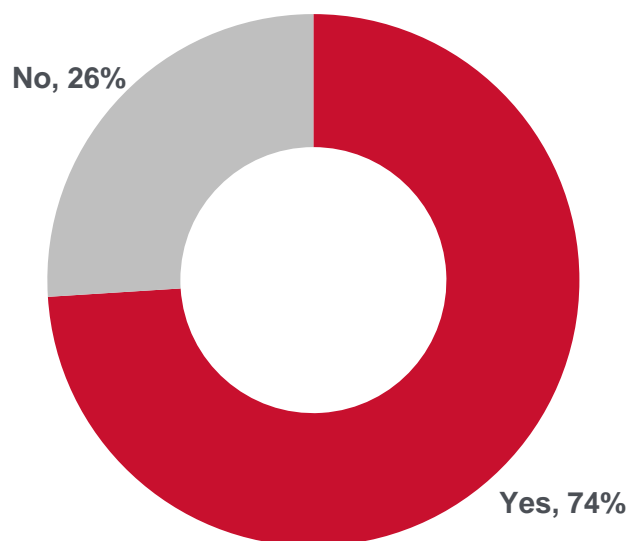
Q9. What kinds of things have you heard or read about the Green Line LRT? [Unaided responses] Base size: Those who have heard very or somewhat negative information about Green Line in Q8 (n=103) [Multiple responses permitted]

**Note: Despite having rated the information they've heard about Green Line as negative overall, 36% of these respondents reported having read or heard benefits of the project.*

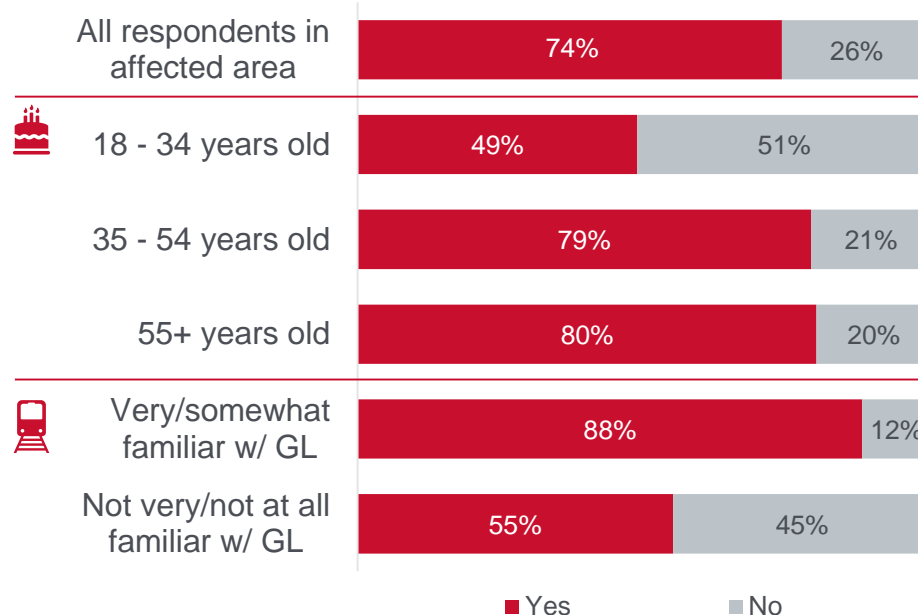
Awareness of Construction Area

One quarter of those living in communities close to the Green Line LRT construction area are unaware they reside in a Stage 1 affected area. The youngest age group is most unaware. One in eight who are familiar with Green Line are unaware they fall into the construction area.

Total in affected area (n=220)



Awareness by Demographics



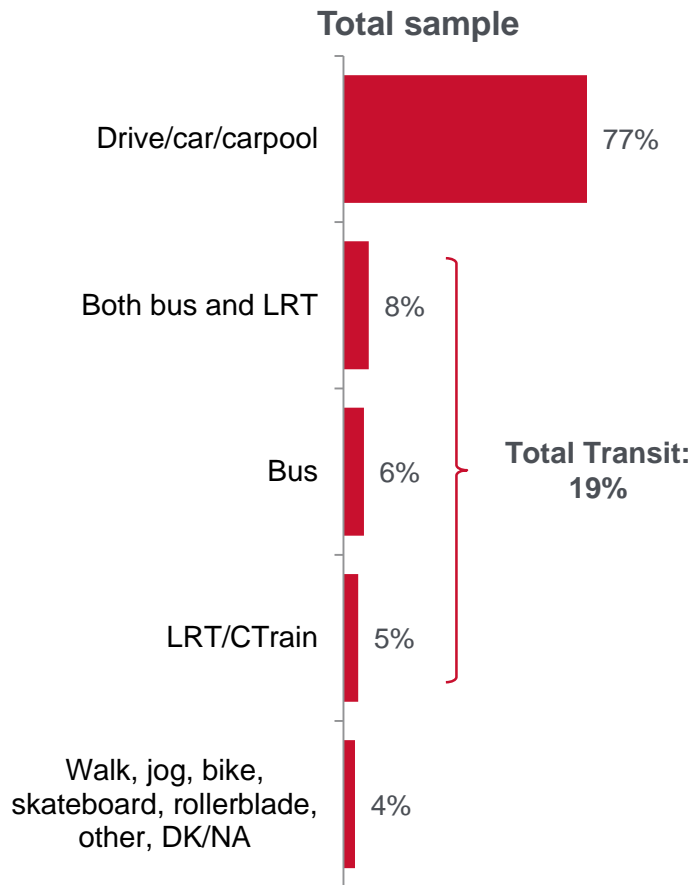
Q18. Your community indicates that you are in an area close to the Green Line LRT where construction will take place. Were you aware of that?
Base size: Those in the affected area, D2a (n=220)



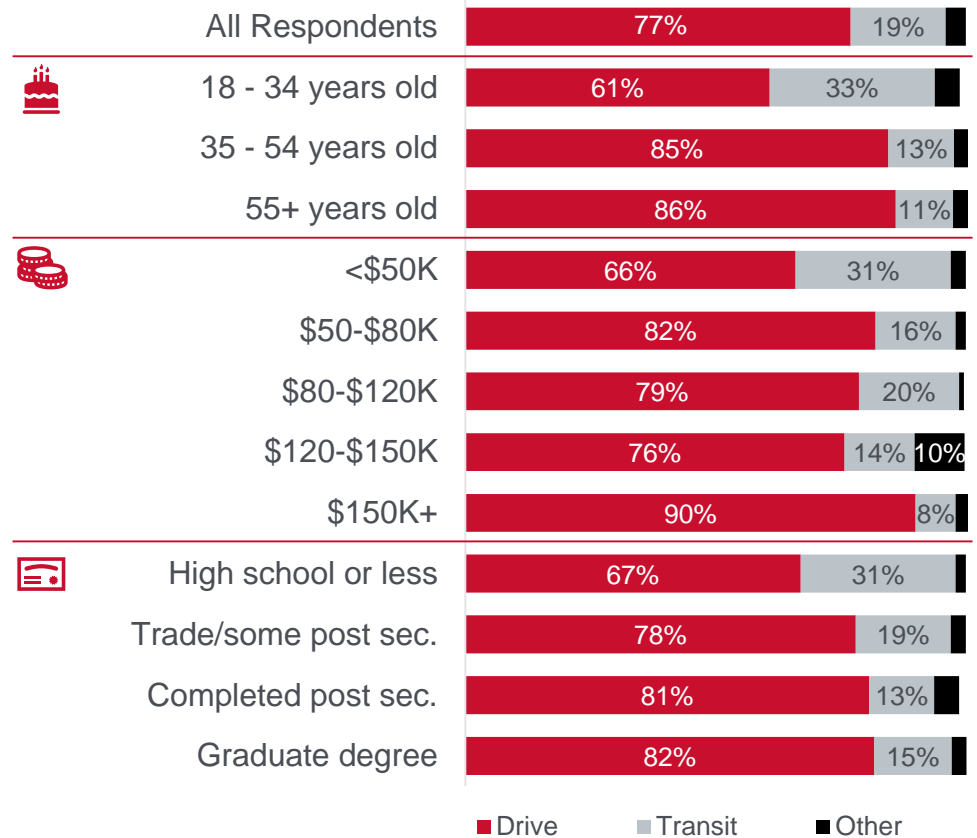
Likelihood of Use & Travel Behaviour

Primary Mode of Transportation

One in five Calgarians currently use public transit as their primary mode of transportation. Transit use is highest among the youngest age group and those with the lowest household income and education levels.



Transportation Mode by Demographics



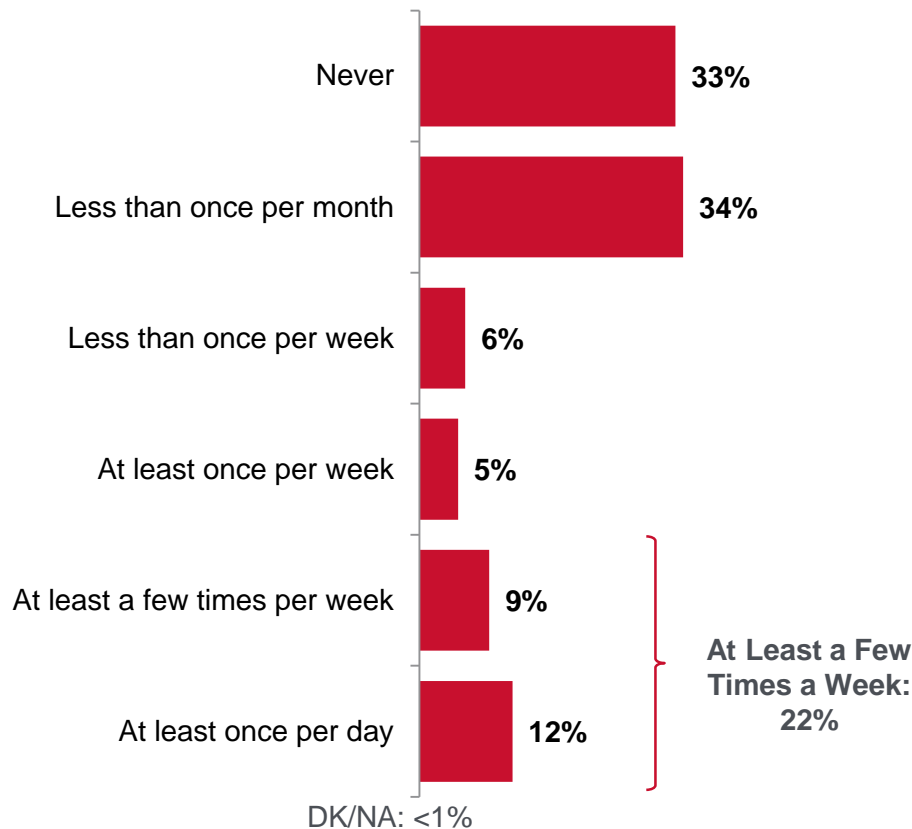
*Responses with 4% or less are not stated

Q2. Over the past year, what would you consider your primary mode of transportation to get around the city? Base size: All respondents (n=802)

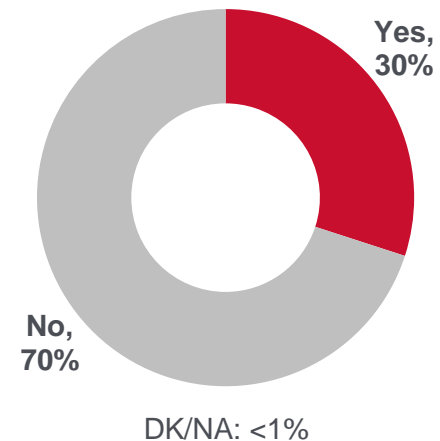
Frequency of Use of Calgary Transit

More than two in ten use Calgary Transit at least a few times a week. Three in ten say someone in the household also uses transit at the same frequency.

Personal Use of Calgary Transit



Others in Household Using Transit at Least a Few Times a Week

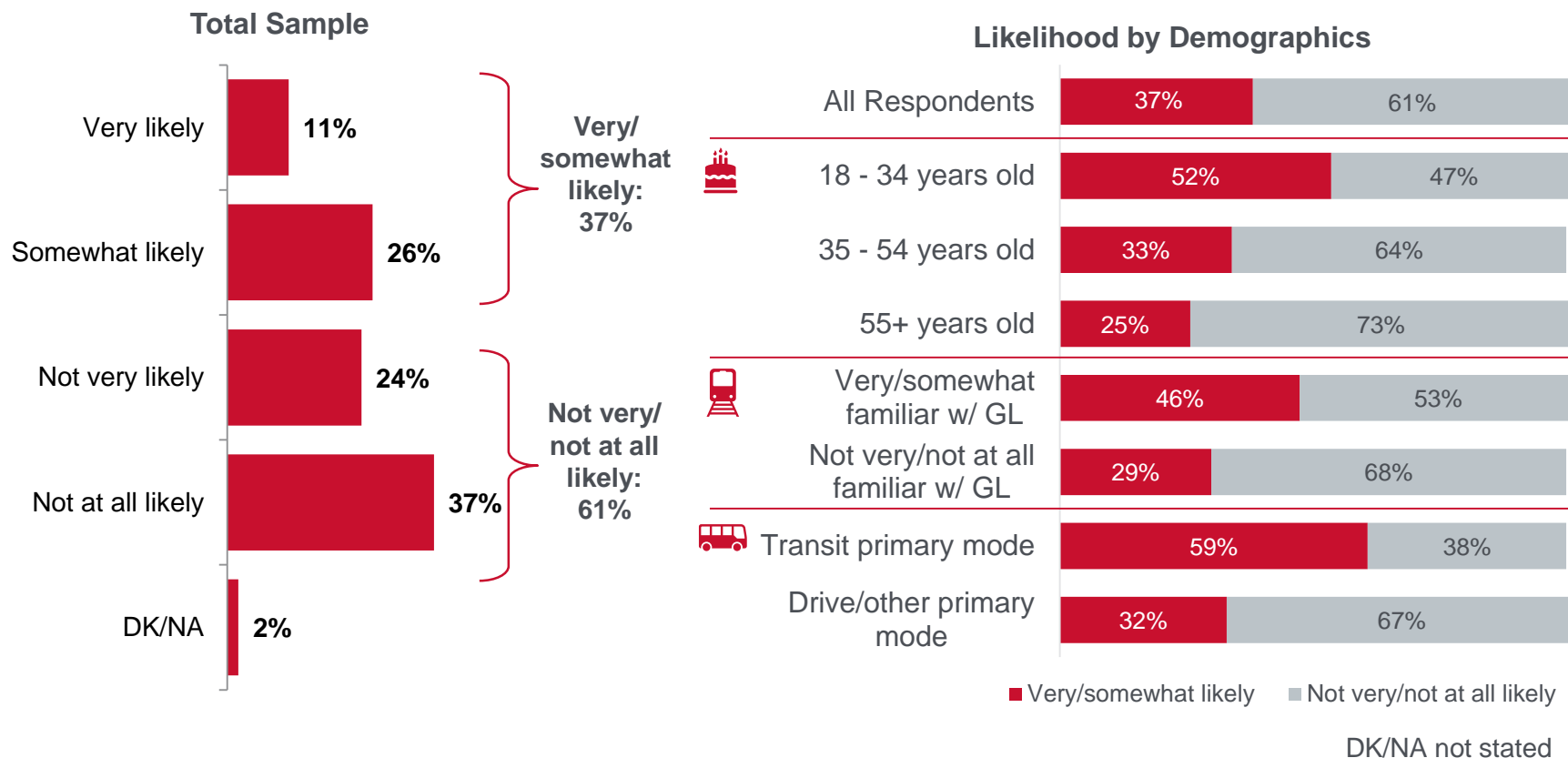


Q3. Generally speaking, how often do you take Calgary Transit, for example city buses and the LRT? Base size: All respondents (n=802)

Q4. Is there anyone else in your household who regularly uses public transit at least a few times per week? Base size: All respondents (n=802)

Likelihood of Using Stage 1

Approximately two in five anticipate using Stage 1 when it is complete. Stated likelihood is highest among the youngest age group, those who primarily use transit for travel and those with greater familiarity with the Green Line.



Intent to Use the Green Line (Advanced Analysis)

The use of advanced analytics* reveals that factors driving intent to use the Green Line are based on three areas.

#1 Perception of personal impact

- This factor includes four key areas that are closely linked together: impact to individual during construction (Q12A) and once Stage 1 is complete (Q14A), impact to quality of life overall (Q10), stated likelihood of using Green Line (Q17).

#2 Reported frequency of transit use (Q3)

#3 Perception of information about/familiarity with Green Line

- This factor includes two key areas that are closely linked together: sentiment of information recalled about Green Line (Q8) and familiarity with Green Line (Q7).

What does this mean?

Exposing Calgarians to information that positively increases perception of personal impact will have the greatest influence on intent to use the Green Line.

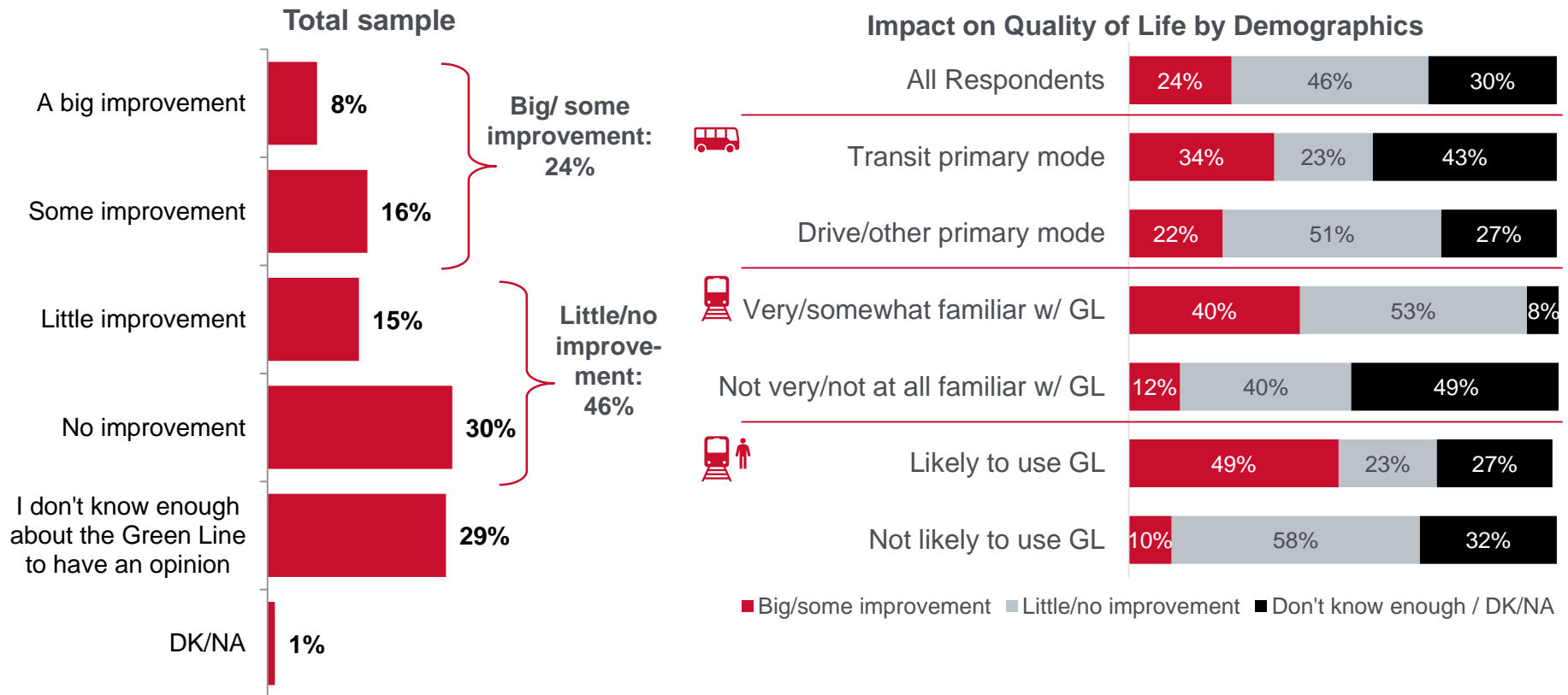
**Advanced analytics techniques included factor analysis, correlation and driver analysis*



Perceptions & Impacts of the Green Line

Green Line Impact on Quality of Life (QOL)

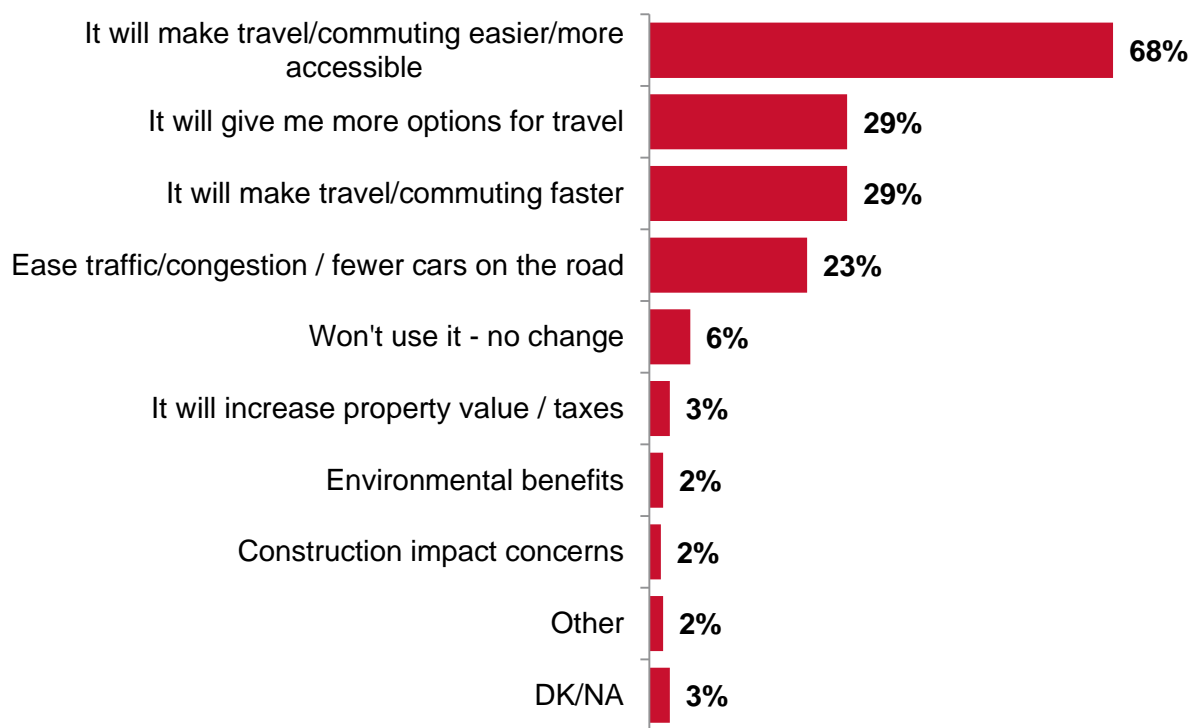
One quarter anticipate an improvement to their own quality of life as a result of the Green Line, a figure higher among those who primarily use transit for travel, those with greater familiarity with Green Line, and those anticipating using Green Line. Three in ten do not know enough to say.



Q10. How much of an improvement, if any, do you think the new Green Line will make to your own overall quality of life? Base size: All respondents (n=802)

Reason for Big/Some Improvement to QOL

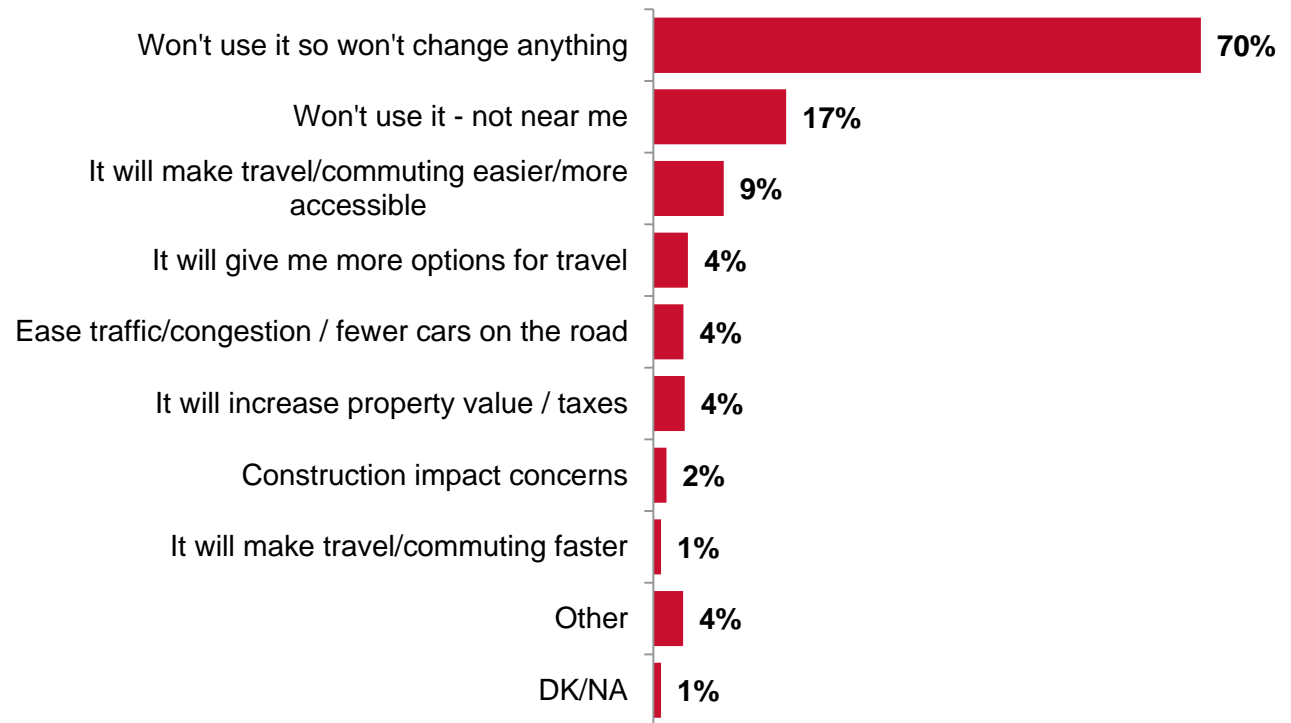
Improved accessibility is the primary reason for those expecting a big improvement or some improvement to their quality of life as a result of the Green Line.



Q11. Why do you feel that the Green Line will make [a big improvement/some improvement] to your own quality of life? [Unaided responses] Base size: Those who say it will be a big improvement or some improvement in Q10 (n=200) [Multiple responses permitted]

Reason for Little/No Improvement to QOL

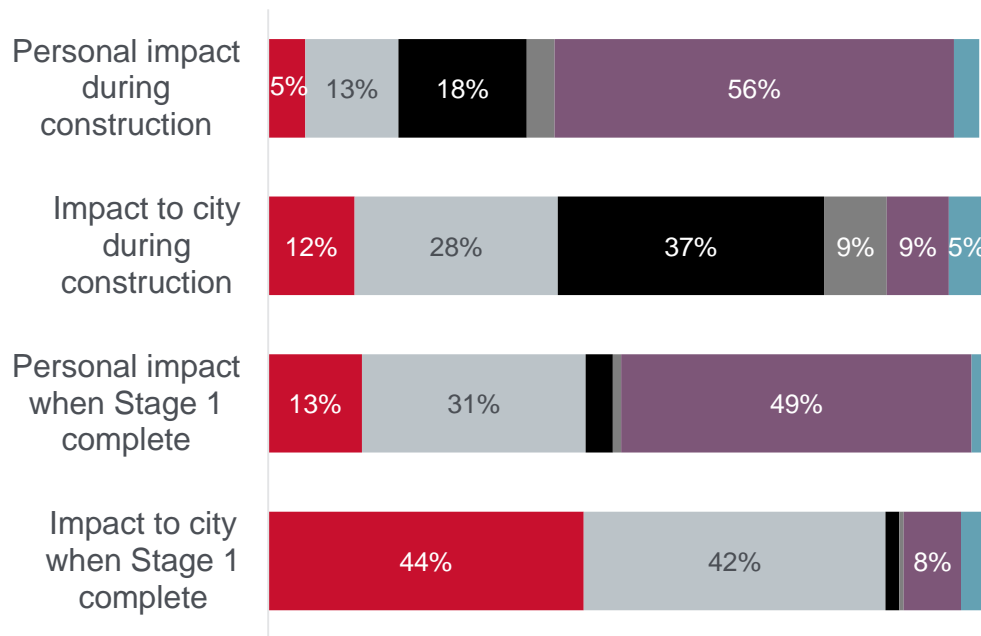
Those who say the Green Line will make little to no improvement to their quality of life say it is because they simply won't use it.



Q11B. Why do you feel that the Green Line will make [little improvement/no improvement] to your own quality of life? [Unaided responses] Base size: Those who say it will make no/little improvement in Q10 (n=411) [Multiple responses permitted]

Perceived Impacts of Green Line

Nearly nine in ten anticipate Stage 1 completion will have a positive impact to the city, although half believe construction will have a negative impact.



Total Positive	Total Negative	No Impact/DK/NA
19%	22%	59%
40%	46%	14%
44%	5%	51%
87%	3%	11%

■ Very positive ■ Somewhat positive ■ Somewhat negative ■ Very negative ■ No impact ■ DK/NA

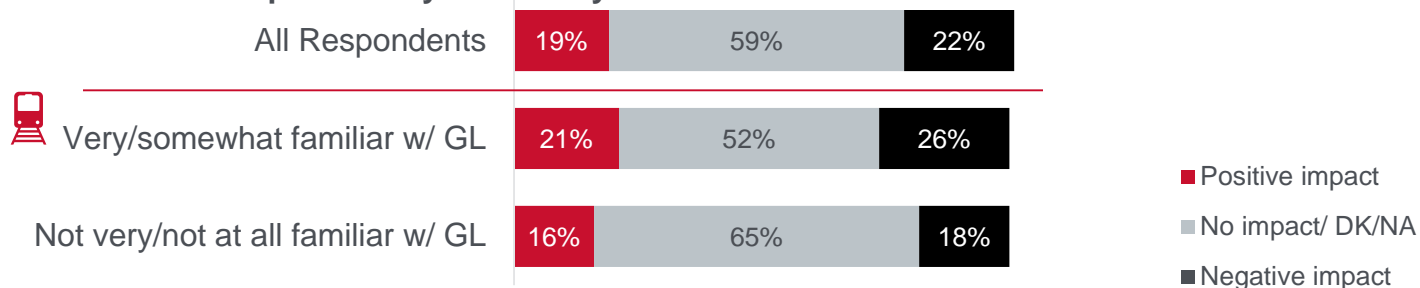
**Responses with 4% or less are not stated*

Q12A, B, Q14A, B. Based on what you have heard about the new Green Line, what impact do you expect . . . [For you personally/For the City as a whole] [during construction of Stage 1/once Stage 1 is complete]? Base size: All respondents (n=802)

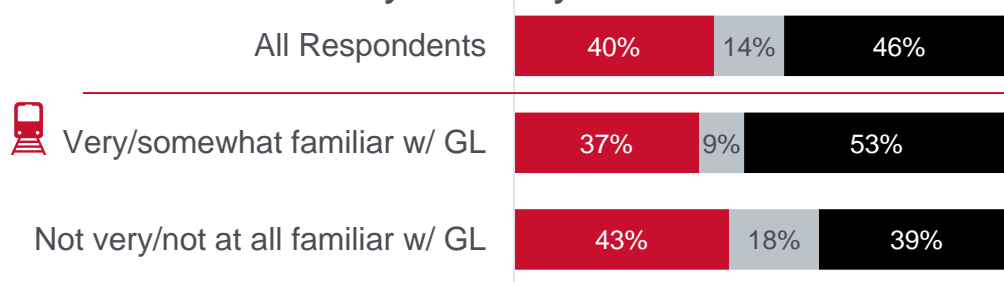
Construction Impacts of Green Line

Those with greater familiarity with the Green Line anticipate greater negative construction impacts, however, the impact is less likely to be perceived as a personal impact.

Perceived Impact of Construction on the Respondent by Familiarity with Green Line



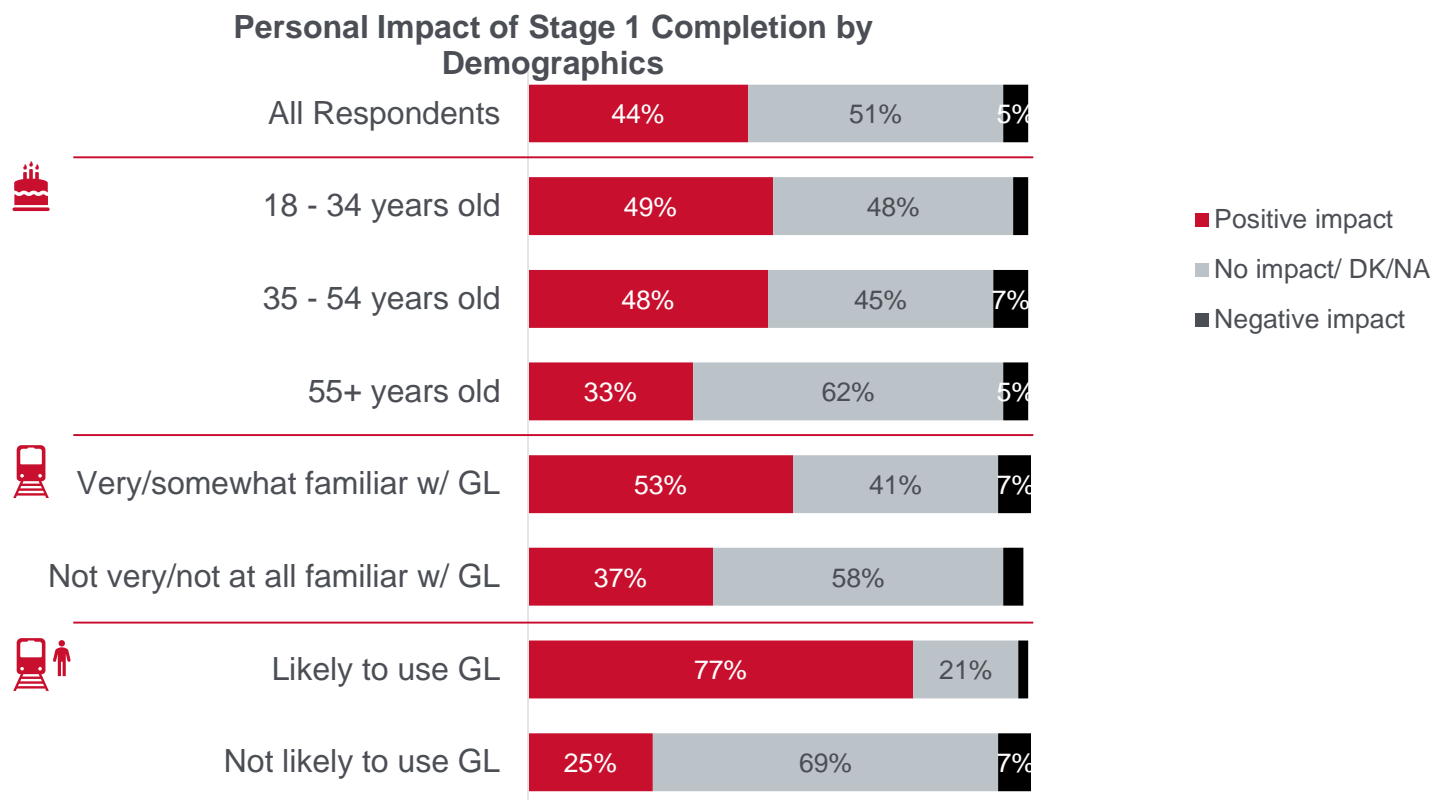
Perceived Impact of Construction on Calgary Overall by Familiarity with Green Line



Q12A, B. Based on what you have heard about the new Green Line, what impact do you expect . . . [For you personally/For the City as a whole] during construction of Stage 1? Base size: All respondents (n=802)

Impacts of Green Line Stage 1

Anticipating Stage 1 to have a positive personal impact is tied to those who are already familiar with the project or say they are likely to use it. As Calgarians are near unanimous in Stage 1 having a positive impact for the city as a whole, there is little difference among subgroups.

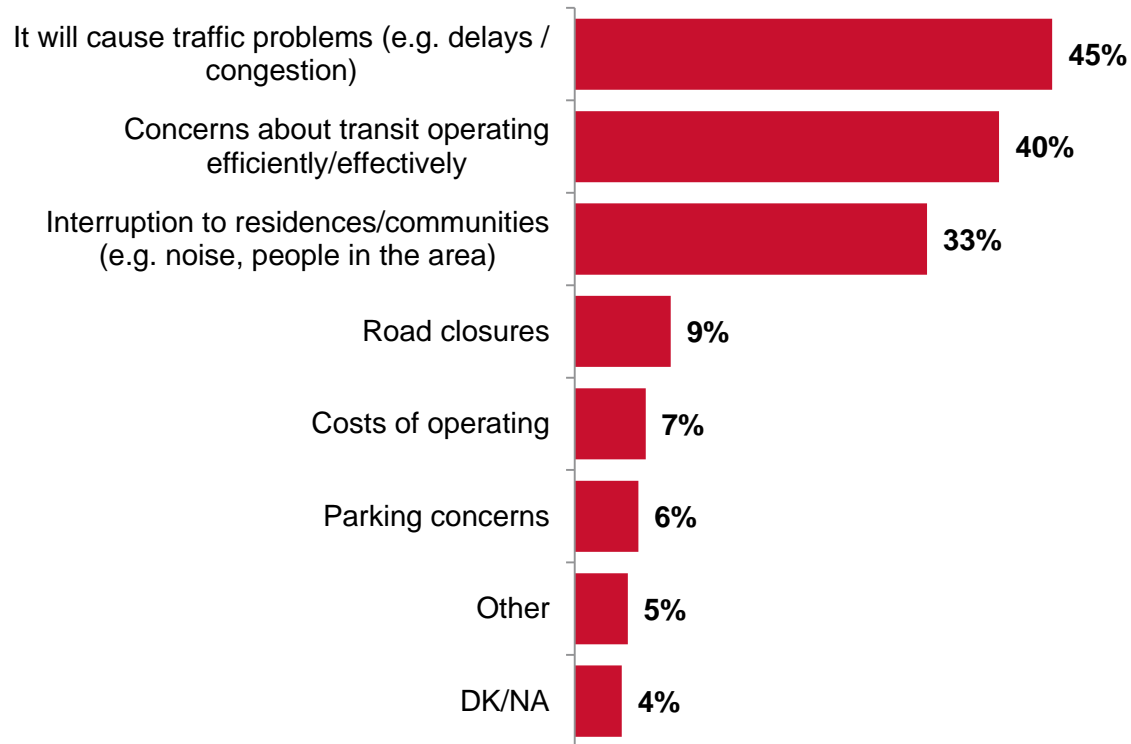


**Responses with 4% or less are not stated*

Q14A. Based on what you have heard about the new Green Line, what impact do you expect . . . For you personally once Stage 1 is complete? Base size: All respondents (n=802)

Negative Construction Impacts

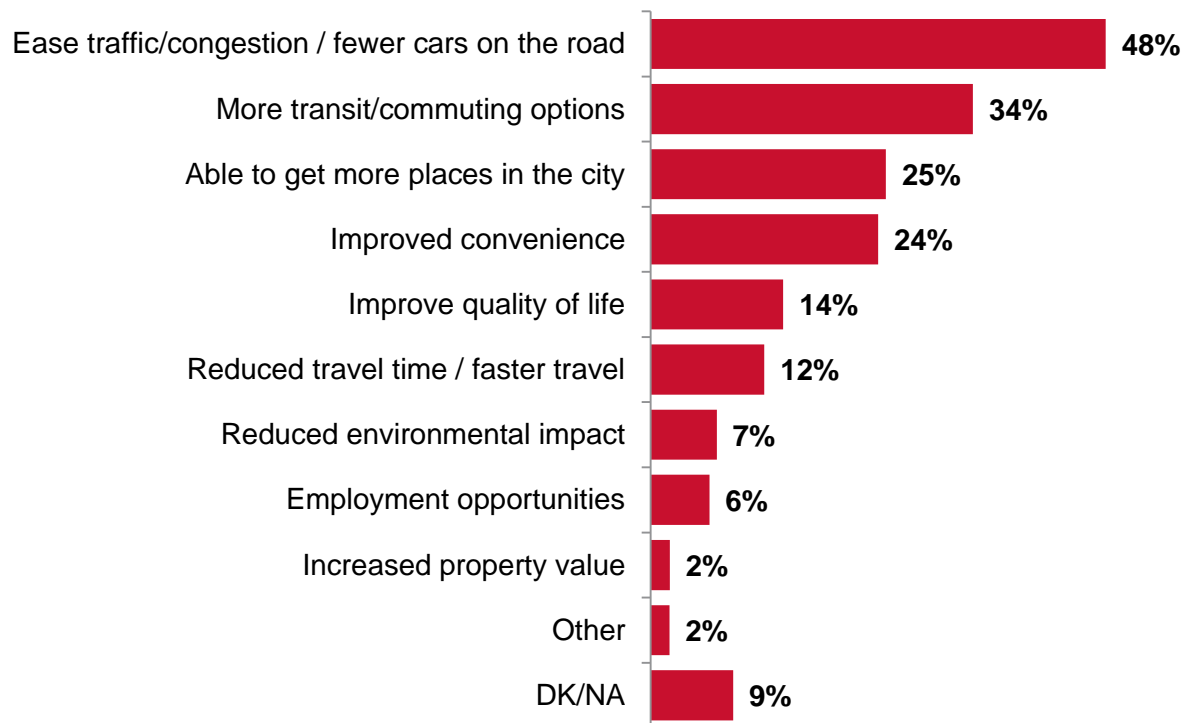
Construction is primarily anticipated to cause traffic problems, with concerns about transit operation and community interruption also top of mind issues.



Q13. What negative impacts are you anticipating during construction? [Unaided responses] Base size: Those who anticipate very/somewhat negative impacts during construction in Q12a and/or Q12b (n=424) [Multiple responses permitted]

Positive Impacts of Stage 1 Completion

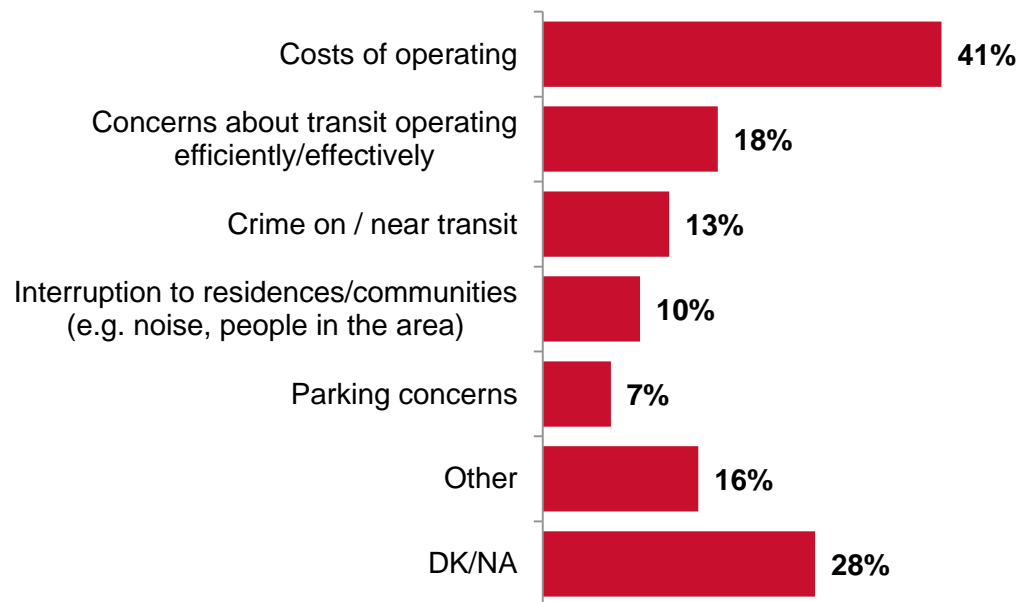
Nearly half of those anticipating positive impacts once Stage 1 is complete say traffic congestion will be eased.



Q15. What positive impacts are you anticipating once Stage 1 is complete? [Unaided responses] Base size: Those who anticipate very/somewhat positive impacts when Stage 1 is complete in Q14a and/or Q14b (n=688) [Multiple responses permitted]

Negative Impacts of Stage 1 Completion

Of those anticipating negative impacts when Stage 1 is complete, the most are concerned about operating costs.



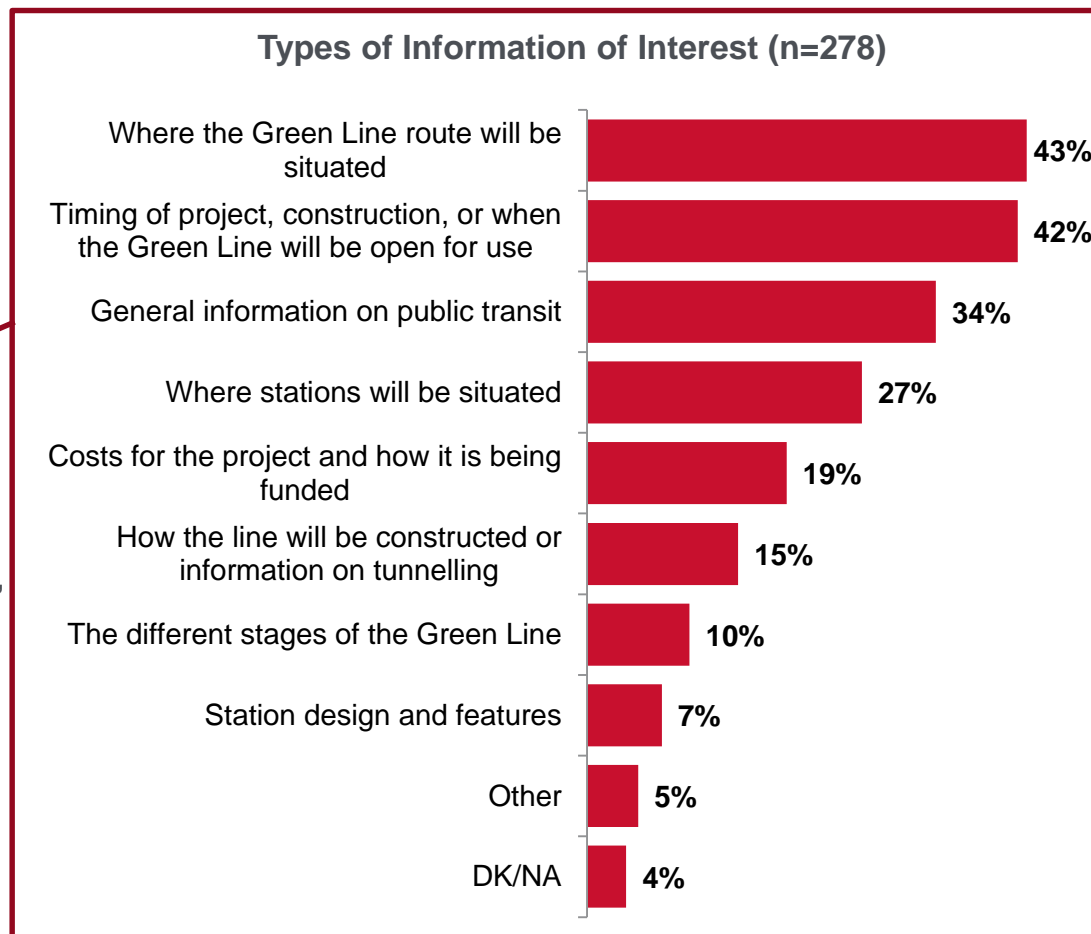
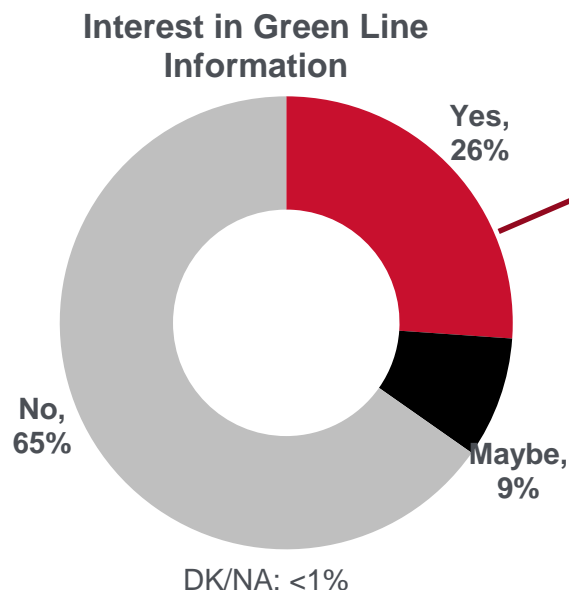
Q16. What negative impacts are you anticipating once Stage 1 is complete? [Unaided responses] Base size: Those who anticipate very/somewhat negative impacts when Stage 1 is complete in Q14a and/or Q14b (n=56) [Multiple responses permitted]



Information Needs

Interest in Green Line Information

Fewer than three in ten are interested in accessing more Green Line information. Top information needs include timing and location.

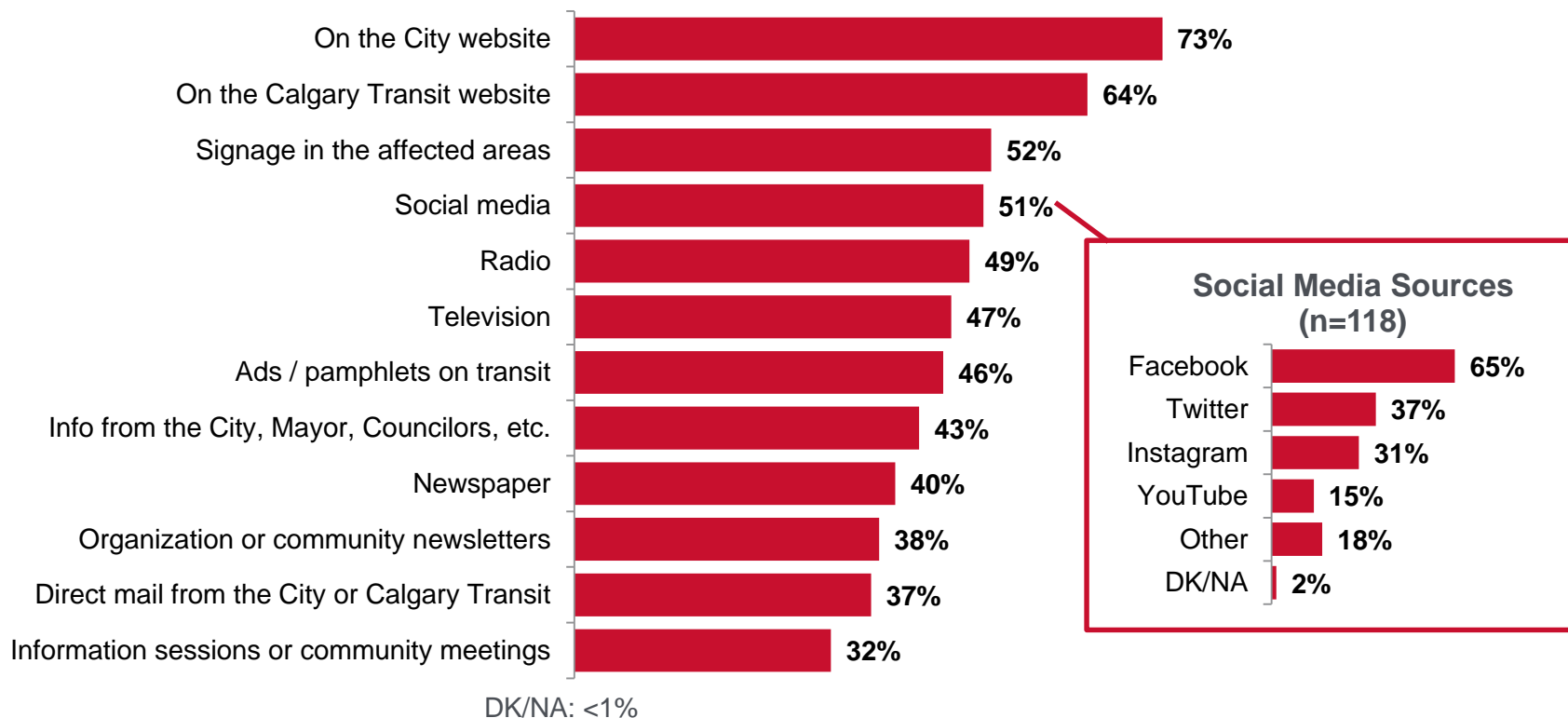


Q19. Would you be interested in more information about the Green Line LRT project? Base size: All respondents (n=802)

Q20. What information are you interested in? Base size: Those interested in more information in Q19 (n=278) [Unaided responses; Multiple responses permitted]

Preferred Method to Access Information

Majorities would prefer to access information about Green Line on The City's or Calgary Transit's websites.



Q21. How would you prefer to access information about the Green Line Transit project? Base size: Those interested in more information in Q19 (n=278)
[Multiple responses permitted]

Q21B. On which social media platforms would you prefer to see information about the Green Line LRT? Base size: Those who mentioned social media in Q21 (n=118) [Multiple responses permitted]



Regional Differences

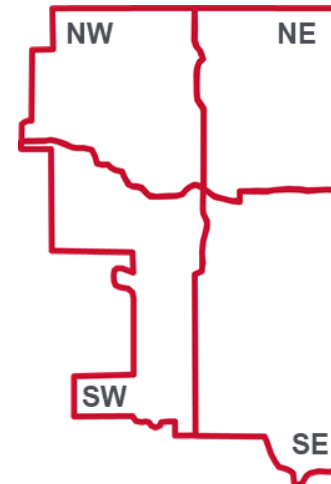
Understanding Regional Differences

Some survey results varied based on location of respondents. This section highlights differences between those living in the affected area (i.e. communities located closely to where the Green Line will be situated) versus the remaining area, as well as differences between Calgary's four quadrants. This section highlights the questions where differences are most notable (not all questions are covered). Results from the total sample are displayed for reference.

Affected area & remaining area



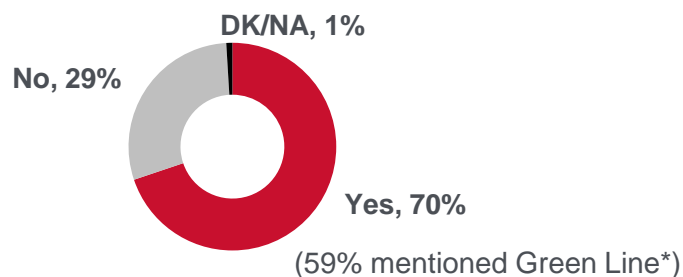
Quadrants



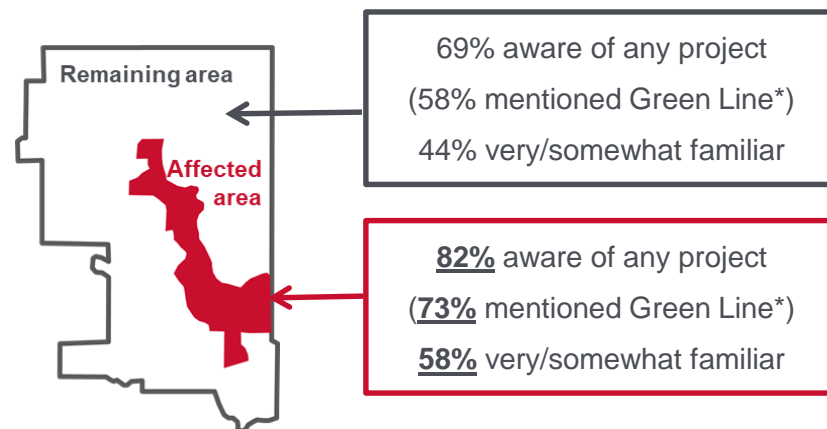
Awareness & Familiarity

Those from the affected area are more likely than those from the remaining area to be aware of any transit project and to specifically state the Green Line.

Heard of Transit Projects
- All Respondents



Familiarity of Green Line
- All Respondents



Note: **Bold and underlined** numbers indicate statistically higher numbers than other subgroups

Q5. Have you heard of, or read about, any transit projects currently underway or planned in the City of Calgary? Base size: All respondents (n=802)

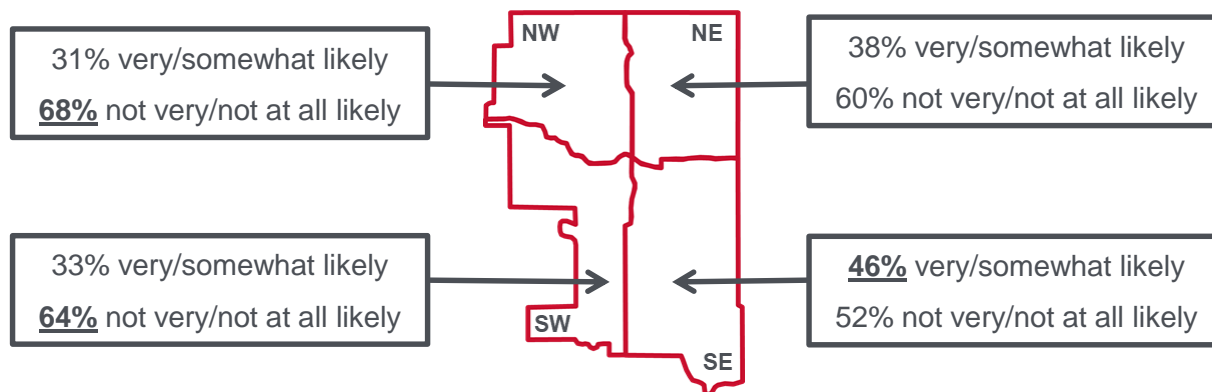
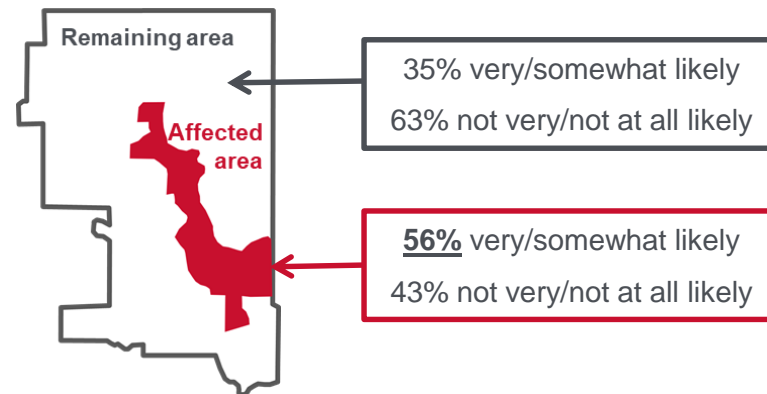
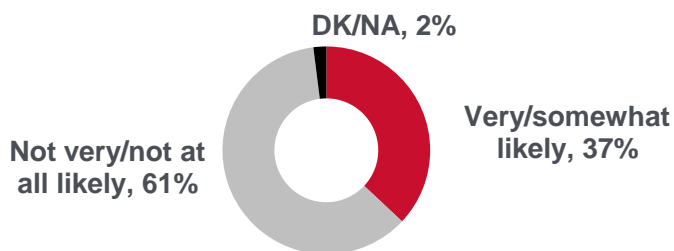
Q6. What transit projects in Calgary have you heard of or read about? Base size: *Those who have heard/read about transit projects in Q5 (n=599)

Q7. The Green Line is Calgary's next LRT line. How familiar would you say you are with this transit project? Are you... Base size: All respondents (n=802)

Likelihood of Using Stage 1

Stated likelihood of using Stage 1 of the Green Line is highest among those from the affected area, as well as those from Southeast Calgary.

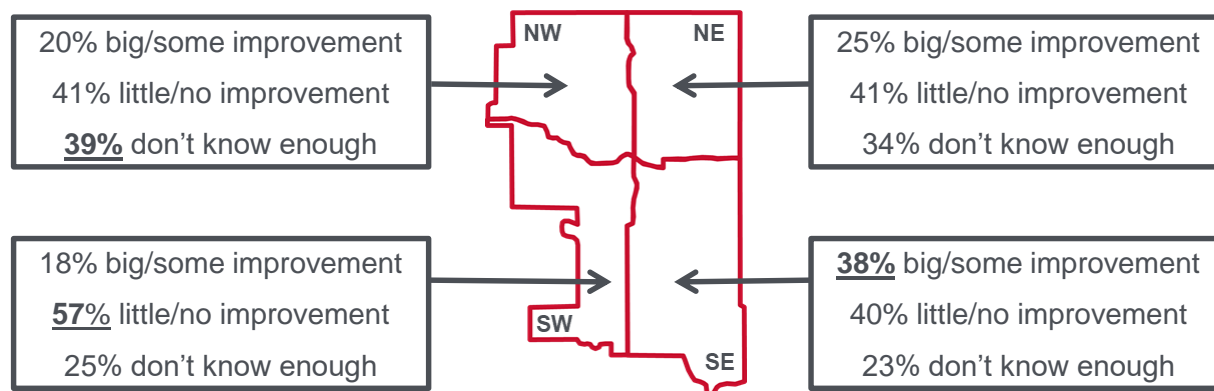
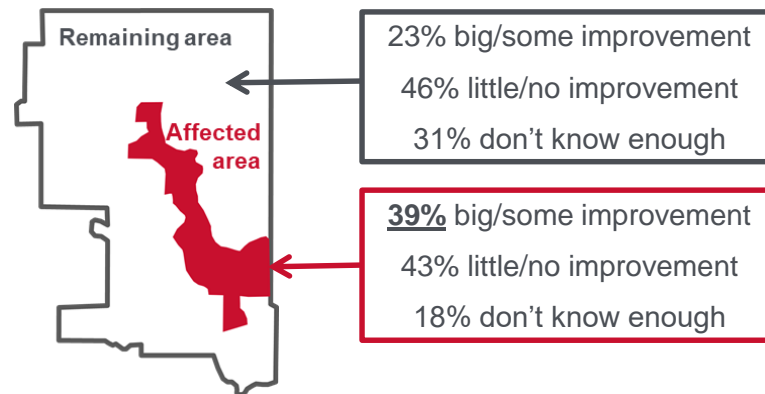
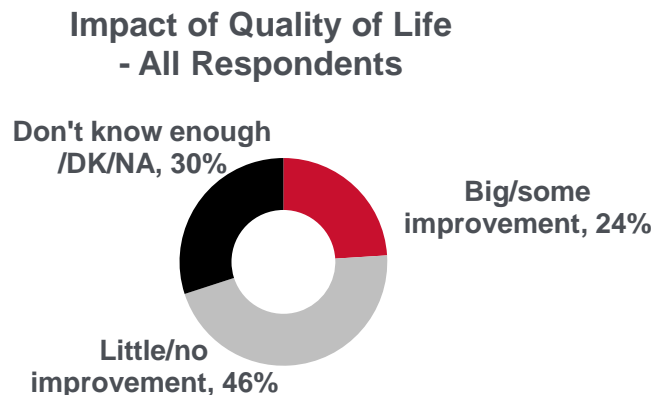
Likelihood of Using Stage 1
- All Respondents



Note: **Bold and underlined** numbers indicate statistically higher numbers than other subgroups

Green Line Impact on Quality of Life

Anticipating a big/some improvement is highest among the affected area and Southeast Calgary. Southwest Calgary is most likely to anticipate little to no improvement. Not knowing enough is highest in Northwest Calgary.

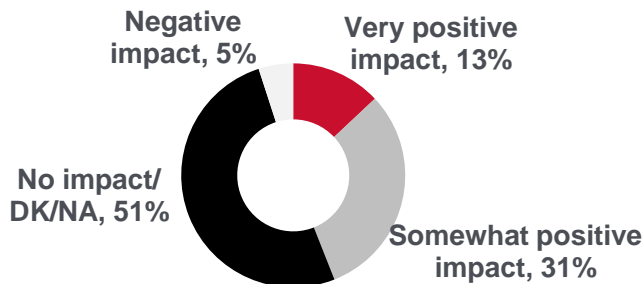


Note: **Bold and underlined** numbers indicate statistically higher numbers than other subgroups

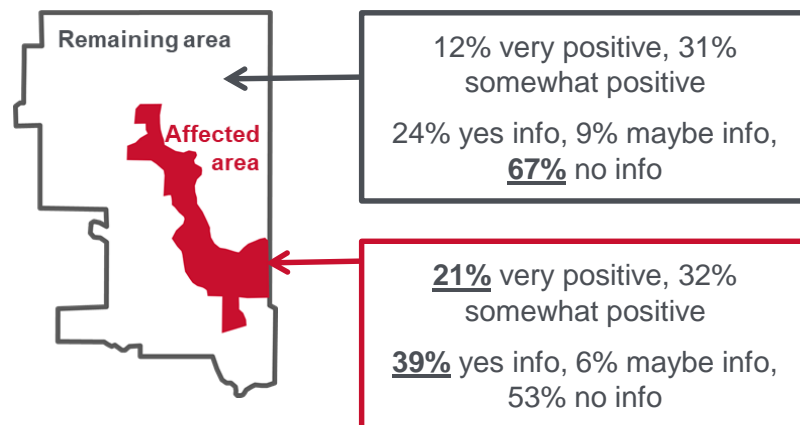
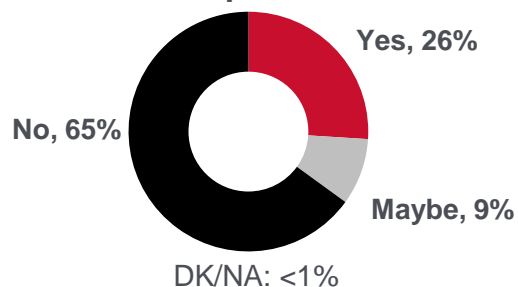
Green Line Impacts & Information

While perceptions of personal and city impacts during and after construction are similar across Calgary, those from the affected area are more likely than those from the remaining area to anticipate a very positive impact. Those from the affected area are also more interested in information about the Green Line.

Personal Impact when Stage 1 Complete - All Respondents



Interest in Green Line Information - All Respondents



Note: **Bold and underlined** numbers indicate statistically higher numbers than other subgroups

Q14A, Based on what you have heard about the new Green Line, what impact do you expect . . . For you once Stage 1 is complete? Base size: All respondents (n=802)

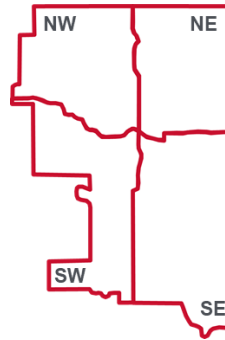
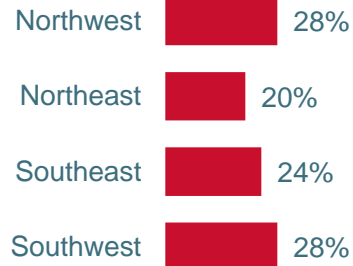
Q19. Would you be interested in more information about the Green Line LRT project? Base size: All respondents (n=802)



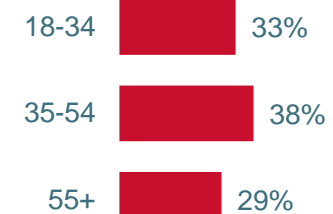
Respondent Demographics

Respondent Profile (Weighted)

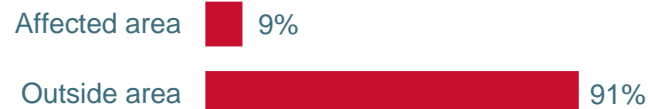
Quadrant



Age



Region

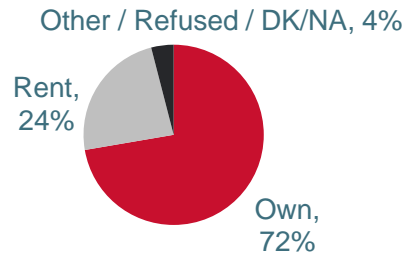


Gender

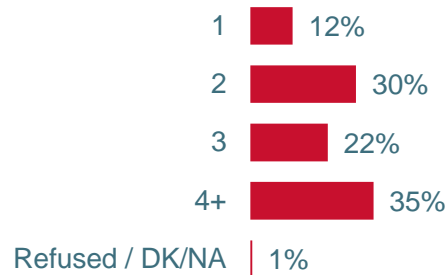


Respondent Profile (Weighted)

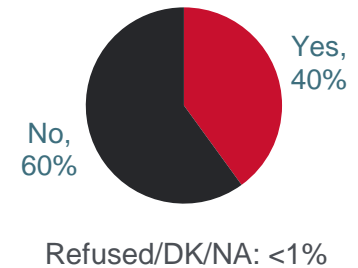
Home Ownership



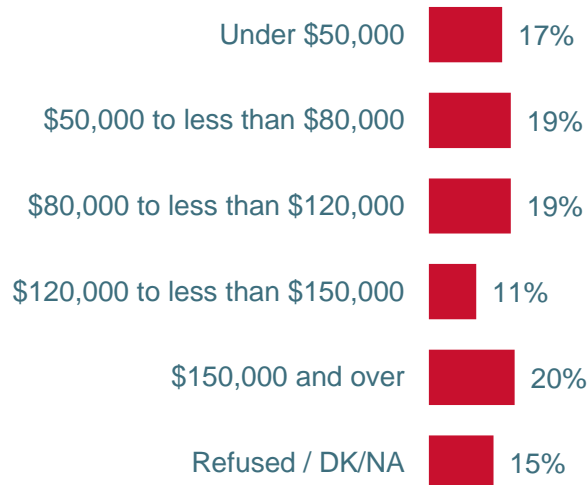
of People in Home



Children under 18 in Home



Household income



Education

