



**TAC Educational Achievement Award Nomination**

**METROLINX**

**Development of the Draft 2041 Regional Transportation Plan: GTHA Regional  
Traveller Personas and the Residents' Reference Panel**

## **ABSTRACT**

By 2041 the Greater Toronto and Hamilton Area (GTHA) will be home to over 10 million people, all of whom travel around the region by different modes, at different times of day and have different lifestyles. Accommodating all these different types of travellers was a challenge Metrolinx embraced as we started to draft the next Regional Transportation Plan (RTP). The Draft 2041 Regional Transportation Plan (Draft Plan) is an update to the Big Move, the GTHA's first regional transportation plan, released in 2008, which takes a people centered planning approach. Two tactics, the GTHA Regional Traveller Personas and the Residents' Reference Panel set the stage and helped shape the people centred direction of the Draft Plan. Both strategies allowed Metrolinx to test the policies, programs and directions against the views and needs of GTHA residents. Through in person sessions with the Residents' Reference Panel and the focus groups and surveys used to develop the GTHA Traveller Personas, Metrolinx gathered a wealth of data related to the attitudes, values, and priorities for the people of the GTHA.

The two tactics are not limited in their use to the Draft Plan. Following the development of the GTHA Regional Traveller Personas Metrolinx held several sessions with Metrolinx Staff, Senior Management, and municipal partners who saw the value in this work. Municipalities have also seen the value in this work and are starting to look into developing their own personas to better understand their local residents and users of their transportation system. The Residents' Reference Panel has attracted attention up to the Metrolinx Board of Directors as a valuable resource for planning and by external partners as a clear voice for the needs of GTHA residents'. The results of the panel and persona work have been shared with our partners and all levels at Metrolinx, and used to inform Metrolinx marketing campaigns and business development, in addition to feeding into the Draft 2041 Regional Transportation Plan.

## **INTRODUCTION AND OVERVIEW**

The Draft 2041 RTP is a people centered plan, and in order to better understand the needs of the region we convened a Residents' Reference Panel that represented the voices of GTHA residents and delivered presentations and workshops around the GTHA with our partners and stakeholders to get their views and feedback. In addition, through qualitative focus groups and quantitative surveys we developed 6 Regional Traveller Personas to help us tailor our planning work to meet the needs of those who live and travel in the GTHA.

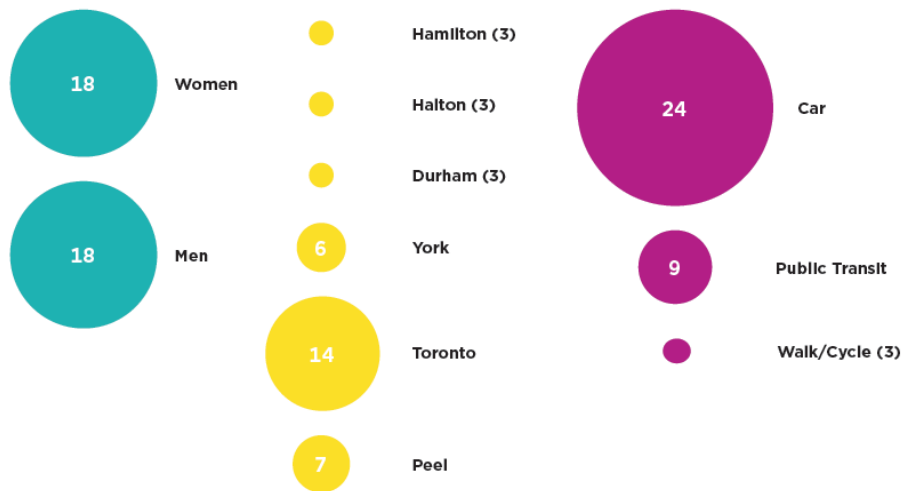
### **Methodology, Work and Results**

#### **Residents' Reference Panel**



In January 2017, 10,000 GTHA households were randomly mailed an invitation to volunteer their time over five Saturdays and be a part of a resident panel and help input their voice into the Regional Transportation Plan. Over 280 people responded to the invitation, either volunteering to be a part of the Panel or requesting to be kept informed about the process. Elected municipal, provincial, and federal representatives as well as employees of Metrolinx and other public transit or urban planning agencies were not eligible to volunteer. From the pool of 165 eligible volunteers, 36 panelists were randomly selected to ensure gender parity and broadly represent the population, demographic characteristics and regions that make up the GTHA.

Panel Snapshot:



The Panel was chaired and facilitated by MASS LBP, our consultant working on the project, to ensure the panel remained neutral and unbiased. Metrolinx staff was in attendance at each meeting but were only called upon when presenting or asked to answer questions. Participants were welcome to share their ideas and opinions openly.

Members of the Panel met five times between March and May 2017, including once for a tour of transportation facilities important to the regional network. Over the course of these five meetings, the Panel heard from a range of transportation experts about the opportunities and challenges related to transportation planning in the GTHA. The panelists drafted a report outlining their recommendations in their own words, which was presented to and accepted by a member of the Senior Management Team at Metrolinx.

In their report, the panel made seven recommendations on the need for Metrolinx and its partners to do the following:

**Connectivity, convenience and integration:** Improve coordination of routes and schedules, integrate transit fares across the region, and make PRESTO more convenient.

**Equity and accessibility:** Ensure barrier free access across all facets of the transportation journey for all users and implement discounts or subsidies for low-income residents.

**Health, comfort and safety:** Improve infrastructure, lighting, amenities and operations to improve health, comfort, and safety of users and employees.

**A well-planned region:** Strengthen the regional transportation governance model to promote greater alignment among municipal, regional and provincial priorities, achieve greater collaboration between operators, and expedite the delivery of major transportation projects

**Exemplary environmental footprint:** Encourage the use of public transit and active transportation by whatever means are found to be most effective, improve air quality inside and around stations and corridors, and increase procurement from suppliers with environmental certifications.

**Prosperity and competitiveness:** Identify regional nodes where expanded transit services and a mix of other land uses can be developed, leverage emerging technologies to make the system more efficient, and facilitate the efficient movement of goods and people by better utilizing existing road infrastructure.

**Public awareness and communication:** Enhance the profile of regional transportation planning, provide periodic updates on transit expansion for distribution to residents in the region, create campaigns to promote new services and plans, raise the profile of transit operations outside Toronto, and make transportation policy the third pillar in a successful, healthy and prosperous society.

The panel provided Metrolinx reasoning on why each of these areas are important, what Metrolinx and its partners should do in the next 5 years and what they should do in the long term to achieve success in those 7 areas.

### GTHA Traveller Personas



As part of the work to inform the Draft Plan, Metrolinx developed 6 GTHA Regional Traveller Personas. The goal of persona development research is to bring order to a rather chaotic world - to see the patterns, and to see the groupings of travellers that share common behaviours, choices and feelings. Persona development can help reduce the noise and bring focus.

To believe in persona development is to believe that travellers are neither completely different from one another or that each and every traveller is the same. Persona development is about modeling the traveller space with the goal to provide clarity on how different segments of the population benefit from different policies and projects contained in the Draft Plan.

In order to develop the personas, Metrolinx working with Northstar (an agency specializing in customer insight), took a two phase approach to learn about the persecutions and choices that that shape how people move around the GTHA every day.

#### Phase 1: Qualitative Research

The first phase was an exploratory qualitative phase consisting of 10 focus groups led by Northstar among travellers throughout the GTHA. This phase helped us explore and discover the rational and emotional relationships travellers have with travel in the GTHA and was used in the quantitative questionnaire design.

The 10 groups were not designed to be representative of the GTHA traveller population; rather, they represented specific groups of travellers of interest to

Metrolinx. This included specific groups among New to Canada residents, those with lower incomes, teens/young adults, etc.

## Phase 2: Quantitative Online Survey

The second phase was a large quantitative survey of GTHA residents and visitors to the region.

- The total sample size included **8,566** people and includes the groups below. The data was weighted to be representative of the GTHA population according to age, gender, and region.
  - **7,721** GTHA residents (those who live in the GTHA according to postal codes provided) between the ages of 13 and 75 years.
  - **109** frequent travellers (those who live outside of the GTHA but say they travel in the GTHA once a week or more often).
  - **934** visitors (those who do not live in the GTHA and do not travel in the region frequently) also completed the survey. *These travellers answered different questions and are not included in the persona development analysis or report.*

Through this approach, 6 distinct personas emerged. The six traveller personas are:

### **Time and Balance Seekers (TBS)**

Hard working, family-oriented drivers who are open to using other modes but are concerned with the safety and cleanliness of public transit and the ability for it to meet their needs for all the multitasking trips they need to make. They need options that allow them to get to their multiple destinations quickly to have more time for family and themselves.

### **Traditional Suburban Travellers (TST)**

Suburban and car dedicated, the TST is the least likely to consider other modes to get around the region. The car gives them freedom; it's convenient, comfortable and provides control over their travel. Their focus is to make the GTHA more car-friendly by reducing congestion to alleviate their stress and frustration when driving.

### **Frustrated Solution Seekers (FSS)**

Affluent, suburban dwelling, drivers who would like to have another option but require the speed, convenience and reliability of a car; however, they find driving stressful and frustrating. They are looking for more seamless and integrated first mile and last mile solutions that meet their schedule in order to switch to other modes of travel.

### **Connected Optimizing Urbanite (COU)**

Young, active, city-dwelling professionals who frequently travel around the region, more than any other persona. They take a variety of modes depending on their needs but are looking for quick, convenient door-to-door solutions that get them where they want to go while avoiding unnecessary connections. Technology is important to them and they want an integrated system that uses technology to optimize how people use transportation.

### **Satisfied Mature Urbanite (SMU)**

Older, Toronto-dwelling and mostly retired who don't travel too far outside their community. They are largely satisfied the transportation in the region and feel that it can only get better, more reliable and easier in the future. They have many options for their journeys and want transportation to be as environmentally friendly as possible.

### **Aspiring Young Traveller (AYT)**

The youngest traveller, they are active and live in the city and the least likely to drive or own a car, although they do get rides with others. They predominately use transit and active transportation as their primary modes and will continue to do so into the future. They are looking for a transportation system that integrates technology to make it more predictable, faster and easier.

One of the major conclusions of this research is that the mode of transport people choose - whether to drive, walk, cycle or take transit - is determined by more than just travel time. The choice of mode of travel is informed by a person's situation - where they live, for example - and their attitudes towards public transit and active transportation. Key determinants are perceptions of safety, convenience, comfort and predictability, as well as the speed of travel. The research revealed that most travellers are generally satisfied with travel in the region, but they often found it to be slow, stressful and not well integrated. Transit is often viewed negatively compared to driving, and is not seen as a first choice for getting around, especially outside the urban core.

## **DESCRIPTION OF THE ACHIEVEMENT**

### Residents' Reference Panel

The panel was created to provide Metrolinx with a diverse and representative regional voice from which to better understand the experiences and concerns of residents living in the Greater Toronto and Hamilton Area. Moving beyond the traditional public meeting, panellist not only got to share their thoughts and

experiences but got to learn about the policy, planning context and different perspectives that go into planning transportation for the GTHA. Participants became better informed and got to actively participate in the development of a 25-year planning document that will help guide how people move around the region in the future. The panel was designed to be an impartial and voluntarily advisory body that worked to represent all GTHA residents and exemplified high standards of transparency, accountability and civic participation. Residents were asked about their values, needs and wants but were challenged to prioritize and break these down into seven recommendations to Metrolinx that were reflected in the Draft 2041 Regional Transportation Plan.

In addition, the work of the panel has served as an important cornerstone to engagement on the RTP. It formed the basis for 6 public roundtables, one in each region of the GTHA, to hear the feedback from the public and discuss key aspects of the RTP. Members of the panel were also featured in a short video showcasing their work played for the Metrolinx Board of Directors at their September Board Meeting and sat on a panel at the Metrolinx Transportation Symposium in October. Their recommendations were accepted by the Metrolinx Board and their contribution to the RTP has been positively received and their input continues to be important as we move forward to the Draft Final Regional Transportation Plan.

### GTHA Traveller Personas

Creating personas helps organizations see patterns and groupings in individuals that share common behaviours, choices and feelings. This in turn, provides some clarity on how to better serve and retain existing customers, and how to acquire new ones.

Metrolinx developed the six personas, to seek a better understanding of the needs, attitudes, perceptions and expectations of travellers in the GTHA. In a region of over 7 million people, it was important for Metrolinx to do so, to grasp who we are planning for over the next 25 years.

The persona development process gave us additional insight on the current and potential behaviour pertaining to travelling in the GTHA for all modes; perceptions of the regional and local passenger transportation system and other modes; and the unique and diverse needs of people when travelling throughout the region. The personas also allowed Metrolinx to understand how future trends in the region may impact different travellers. These insights together have, and will continue to, help Metrolinx develop projects, plans and policies on regional transportation that reflect traveller's unique needs and expectations, allowing Metrolinx to take a "people first" approach to planning.



Through the personas, we know that an overwhelming majority (over 75%) of GTHA travellers prefer driving over all other modes, in part because it is perceived as the quickest way to get to one's destination. The GO Train while perceived as a more relaxing mode that allows users to choose how they spend their time is also seen as expensive and doesn't get people to where they need to be. Likewise, associations with local bus are negative, often sighted as being crowded, frustrating and a waste of time. Subways and streetcar service is also seen as mostly negative. Aside from being "physically exhausting" walking is seen as a positive travel mode while biking is mainly associated with being scary and stressful.

A key finding that resonates across all personas is that travellers are more satisfied with their experiences than originally anticipated. The personas have helped us understand that safety, convenience, predictability and speed are the most important variables considered by people when selecting a mode of travel. Together, all of these findings present Metrolinx with an opportunity to develop a Plan that considers the quality of the traveller experience, whether by car, foot, bike or transit.

## **BENEFITS**

### Residents' Reference Panel

The Panel has been a valuable resource that has shown the importance of public input into our planning processes. Including the voice of GTHA residents' also allows us to achieve greater buy in for the plan as the policies and projects contained in the RTP were partly due to recommendations provided by the panel. The peer to peer feedback allows us to better communicate the plan with the public and the work of the panel served as basis for our public meetings on the RTP.

Internal staff and external partners and stakeholders have seen the value in this work and hold the research and findings in high regard when trying to understand the needs of GTHA residents. Both the panel and the personas have allowed partners and stakeholders to talk about transportation in the region from a common context through the eyes of the people they are planning for.

### GHTA Traveller Personas

The main purpose of the personas was to help with scenario modelling of the Draft RTP, specifically, to help with understanding reactions towards different policies and projects proposed as part of the Draft Plan. Each scenario was tested against the personas to understand what each would experience and which of the personas would benefit the most under each one of the scenarios. This allowed us to see which combination of projects and policies have the greatest benefit for travelers in the GTHA.

However, beyond the RTP there are also additional benefits that can be and were actualized from the personas:

- A more detailed understanding of how and why people make the trips that they do help us with understanding the impacts of projects and policies on people's travel choice, helping with implementing Transportation Demand Management (TDM) measures and behavior change strategies. Shifting travel behavior away from car travel is a corporate goal.
- GO Transit, other transit agencies and municipalities across the region will benefit by understanding their customer needs. This could improve the regional perception of transit and therefore increase ridership.
- It will also help identify "quick wins" for service improvements.
- The personas have been used as a communication tool both internally and externally. Internally, the persona research has helped identify potential demand and sensitivities for different projects. Externally they have helped create a narrative that the public can relate to, bringing them into the conversation about transportation in the region

## **CONTRIBUTION MADE TO EDUCATION / TRAINING**

Both the traveller personas and the Residents' Reference Panel helped us develop the policies and projects within the plan by allowing us to better understand the unique needs and expectations of travellers in the GTHA.

The work done has been shared with internal and external stakeholders to not only share our work, but to highlight how the data we have collected can be used and applied across their work as well. For example, Metrolinx held a series of enculturation workshops on the GTHA traveller personas including with Metrolinx staff, Senior Management and external transit agencies and municipalities. The workshop invited participants to learn about each of the personas through presentations, role playing and a short quiz so they could better understand the 6 types of travellers in the GTHA.

The Residents' Reference Panel was a different approach to the traditional way of obtaining public feedback. This process got residents working together and engaged in the development of the plan. This allowed Metrolinx to not only share our ideas but show panel members the wider context, challenges, and opportunities in which we work. This approach facilitated a much different dialogue that not only is translated into the RTP but has fostered a group of informed citizens that can share their knowledge.

Both these initiatives have given us a wealth of data that we have been sharing internally, with our partners and stakeholders. Many have seen value in this type of work and have started to use this approach in their own planning initiatives.

## VALUE TO THE CANADIAN TRANSPORTATION COMMUNITY

The methodology and techniques used to develop the Draft Plan can be applied beyond the GTHA and across the country, allowing transportation planners to better understand local residents and traveller perceptions and behaviours. Increasingly, transportation planners are recognizing the importance of the traveller experience. This work helps us better understand this need and perceptions and these insight can be used to help inform the planning policies, projects and complement modelling work to develop resilient plans.

## MAIN PROJECT TEAM

### Residents' Reference Panel

- Project Manager: Krystal Perepeluk (Metrolinx)
- Metrolinx: Peter Paz, Lisa Salsberg
- Consultant Support: MASS LBP

### GTHA Regional Traveller Personas

- Project Manager: Alexandra Goldstein (Metrolinx)
- Metrolinx: Peter Paz, Lisa Salsberg
- Consultant Support: Northstar

**APPENDIX (added as a single attachment to the award submission)**

Final Report and Recommendations of the Residents' Reference Panel on the  
Regional Transportation Plan (p. 1-39)

Metrolinx Persona Brochure (p. 40 and 41)