



2020 Surrey Roads Survey

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Surrey Board of Trade

WHO WE ARE

The Surrey Board of Trade is a city-building business organization that supports, promotes, and advocates for commercial and industrial interests for Surrey businesses — the city’s economic drivers. With Surrey’s rapidly growing significance in the Lower Mainland, the role of the Surrey Board of Trade has never been more important than now to champion a strong vibrant business community for needed economic and infrastructure assets.

OUR MEMBERSHIP

The Surrey Board of Trade is a powerful link between business, government, and community with a membership of close to 3,000 businesses and organizations representing over 6,000 member contacts and 60,000 employees.

WHAT WE DO

The Surrey Board of Trade provides businesses and organizations with

- Economic opportunity
- Workplace development and education
- International trade
- Government advocacy
- Business connections

ADVOCACY

As a city-building business organization, the Surrey Board of Trade is an independent voice of business that develops positions on relevant economic topics of concern to our members.

PURPOSE OF SURVEYS

The Surrey Board of Trade implements surveys on a range of topics to obtain input from our membership. Member participation is voluntary and anonymous; however, the data is an invaluable tool for the Surrey Board of Trade’s advocacy and policy development.

Introduction

The Surrey Board of Trade believes that transportation is one of the key economic foundations of building our city. Representing the interests of our members, we advocate in support of transportation infrastructure improvements for the safe and efficient movement of people and commercial traffic throughout Surrey. To do this, we need to continually assess areas in Surrey that may be impediments for our businesses and industry. Results of this survey will be shared with the City of Surrey for their consideration.

City of Surrey Road Improvement Planning Process

The City's network of over 4,500 lane kilometres of road is seeing increasing population of commuter and commercial usage. The 10-Year Servicing Plan (YSP) establishes the Engineering Department's capital expenditure program including road improvement projects. While the 10-YSP is not a commitment to construct all the identified projects, it identifies projects that will be constructed on a year-to-year basis as funding becomes available. Priorities are evaluated annually. Major projects take approximately three or more years to complete.

Surrey Board of Trade Input

Since last year's survey, the City of Surrey has completed four of the road corridor projects SBOT members identified as top priorities. These include 100 Avenue between King George Blvd to 140 St, 128 Street between 64 Ave and 68 Ave, and 104 Avenue between Whalley Blvd to 148 St. Five more are planned to be completed in the next 1-3 years. These include 160 Street between 26 Ave and 32 Ave, 128 Street between 108 Ave and King George Blvd, Whalley Boulevard between 96 Ave and Fraser Hwy, Fraser Highway between Whalley Blvd and 148 St, and the 192 Street Diversion from Fraser Hwy to 68 Ave.

The fourth annual road survey includes the results from 2016 to 2019. The 2020 snapshot is the baseline from which the Surrey Board of Trade and the City of Surrey can measure improvement over time. Survey responses were obtained in November and December 2019.

The Surrey Board of Trade will continue to implement the Surrey Road Survey to track improvements where they occur and identify concerns as they arise for our members in order to:

- Gain a deep understanding of our members' commute and business travel trends;
- Determine any actions, recommendations, or policies that may be required; and,
- Add to our body of knowledge that will lead to better movement of people and goods through Surrey and the South Fraser Economic Region.

Executive Summary

The first Surrey Road Survey, completed in 2016, is the baseline from which we measure change. Other than the list of City of Surrey projects, all the questions remain the same. Major infrastructure questions on the Pattullo Bridge, Surrey -Langley SkyTrain Project, and the Massey Tunnel were added this year. Questions on ridesharing, bike-sharing, and the City of Surrey's Vision Zero initiative were also added this year.

Business travellers are tracked with this annual survey. It was found that approximately 53% of respondents live and work in Surrey, which is a slight increase from 2018. 79.1% of respondents work in Surrey. There is a slight increase of those working in Surrey and living in the South Fraser Economic Region. The number of respondents is substantially higher than the previous iterations of the survey.

Patterns are beginning to emerge with four years of comparable data. There was a slight downward trend of those travelling for business in 2018, which has seen an increase in 2019. Further, business travellers are driving fewer hours per day overall. In 2018, we saw the first respondents reporting that they cycle to work. That number was reduced to zero this year.

Transit users have returned to 2017 levels at less than a percent although the call for transit throughout Surrey is strong with many roads and routes suggested, along with more benches and covering at transit stops to support transit users.

The top 3 choices for corridors are virtually the same as 2018, and with the same percentages, while Hwy 99 overpasses, and intersections along Fraser Hwy, 64 Ave, 104 Ave, and any major road were prioritized or included in respondent comments.

The City of Surrey is working to implement a Safe Mobility Plan and asked for input on their "Vision Zero" principles. Nearly all Respondents agreed that drivers' personal responsibility in how they drive is as important as planned infrastructure. However, there was no support for reducing speeds throughout the city, but there were many suggestions for how to make roads safer.

Ridesharing is a service that all major cities and regions across the world have had for many years. Our survey Respondents have noted the the need for ridesharing as being quite high.

Surrey is so spread out geographically, and the ability for commuters to utilize bicycling as a transportation option is not efficient to get to and from work.

Support for a new Pattullo Bridge with an expanded 6 lanes has strong support, as is replacing the Massey Tunnel with a bridge. Respondents did comment that the infrastructure north of these crossings will have to be altered or expanded to accommodate travellers, especially during peak hours.

RECOMMENDATIONS

As a result of survey responses and voluntary additional comments, the Surrey Board of Trade recommends:

1. Widen on-and-off ramps of bridges;
2. Plan all major infrastructure projects to anticipate growing population needs; and,
3. That all levels of government work together to develop a comprehensive and sustainable inter-regional transit/transportation plan for the South Fraser Economic Region that would not change with election cycles.

Survey Highlights

The daily commute	<p>53% Respondents live and work in Surrey – this has remained comparable to all levels since 2016</p> <p>23.5% work in Surrey but live South of the Fraser or Metro Vancouver, comparable to 2016</p> <p>92.9% drove their own vehicle to work – up from 2018 (81.3%) and 2016 (87.1%) but comparable to 2017 (92.6%)</p> <p>1.8% walked to work, down from 4.4% in 2018 and 2% in 2016 but up from 0.9% in 2017</p>
Traveling for business	<p>23.5% drive 2-3 days per week, down from 40% in 2016, 27.8% in 2017, and 26.7% in 2019</p> <p>10.4% rarely drive, an increase of 2.2% from 2016, but a drop of 4.4% from 2017 and 0.7% from 2019</p>
Travel destinations	<p>20.4% travel within Surrey in 2019, up 2% from 2016, 4% from 2017 and 4.5% in 2018</p> <p>51.4% travel throughout South Fraser (Surrey plus options combined), an increase of 12.4% compared to the previous year</p> <p>51.3% travel throughout Metro Vancouver, down from last year but comparable to 2016 and 2017</p>
Employee travel	<p>45.7% Respondents estimate that 0-20% of their colleagues travel for business, up by 5% from previous years</p> <p>52.2% of colleagues travel 1 to 2 hours per day on average, up from 49% in 2016 but down from 60% in 2018</p>
Top 3 corridors requiring attention	<p>52.2% Chose arterial widening to 5 lanes on Fraser Hwy between Whalley Blvd and 148 St, including through Green Timbers Park</p> <p>53.9% Support South Surrey/Hwy 99 Interchanges: 24 Ave, 32 Ave, and 152 St overpass</p> <p>43.5% Want 152 Street widened to 4 lanes from 40 Ave to 50 Ave.</p>
Top choice for road connections	<p>64.8% Prioritized a 20th Avenue Overpass: a new Hwy 99 overpass with improvements to 152 St</p>
Top 3 intersections requiring attention	<p>40.2% 64 Ave and 168 St</p> <p>31.6% 24 Ave and 156 St</p> <p>32.1% Want improvements at Fraser Hwy and 184 St</p>
Transit needed	<p>66.4% Respondents rated Rapid Transit on Fraser Hwy (City Centre to Langley) from <i>Should have to Definitely need it</i></p> <p>66% Respondents determined that later bus service on select routes from <i>Should have to Definitely need it</i></p> <p>63.9% believe that new bus service to neighbourhoods not served by transit from <i>Should have to Definitely need it</i></p>
Safety first	<p>90.3% Agree to strongly agree that traffic fatalities & serious injuries are preventable</p> <p>89.4% Agree to strongly agree that it is a shared responsibility between drivers and planners to make roads safer</p> <p>82% Would reduce speed near elementary schools</p>
Ridesharing	<p>63.5% Want Ridesharing services without pickup location restrictions</p>

Bike sharing	59.7% of Respondents would be very unlikely to cycle to work if Surrey had bike sharing 12.3% of Respondents would be <i>Very likely</i> to <i>Somewhat likely</i> to use bike sharing
Bridges wanted	79.1% Want Pattullo Bridge to have 6 lanes available on opening day 65.2% Want a bridge (whether as originally planned or with fewer lanes) to replace Massey Tunnel; only 15.6% would support expanding the tunnel with another tube & upgrades

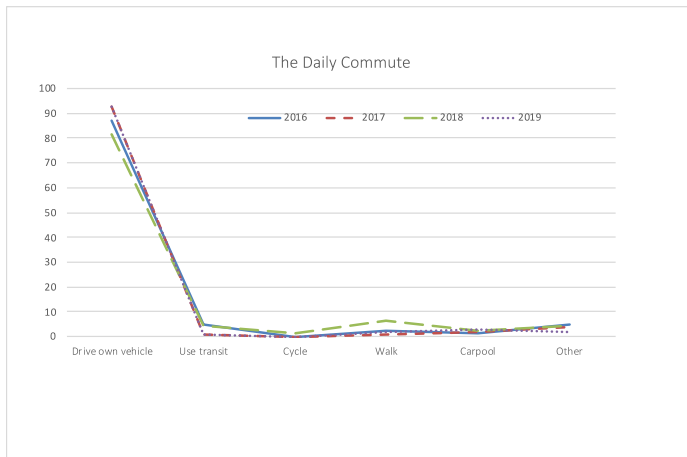
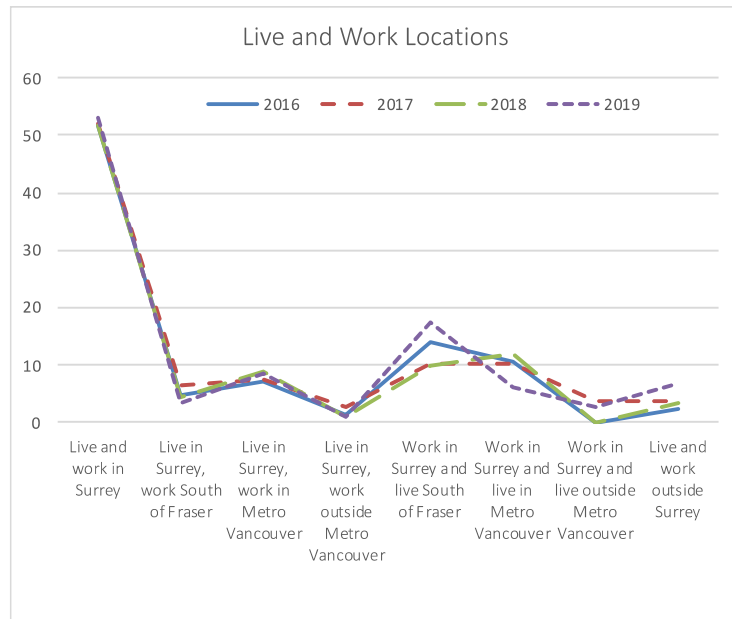
Overview of Results

Please note: Details and tables of results are in Appendix 2 on page 23. All data are in percentages unless otherwise indicated. Numerical data, where given, have been rounded to the first decimal, therefore results may not add up to 100%.

COMMUTING IN SURREY

One of the more important metrics to measure is how many Respondents work in Surrey. Over 50% live and work in Surrey, and this is consistent over the past 3 years. Also consistent is that nearly 70% of Respondents stay South of the Fraser as part of their commute. Most of those who chose **Other** pointed out that they work from home.

Transit usage is consistently below 5%. As later responses demonstrate, the low ridership numbers are more indicative of a lack of reasonable transit options for potential riders in Surrey. ‘Reasonable’ is variously defined by municipal or transit planners as being within 5 to 10 minutes walking distance to a transit stop.

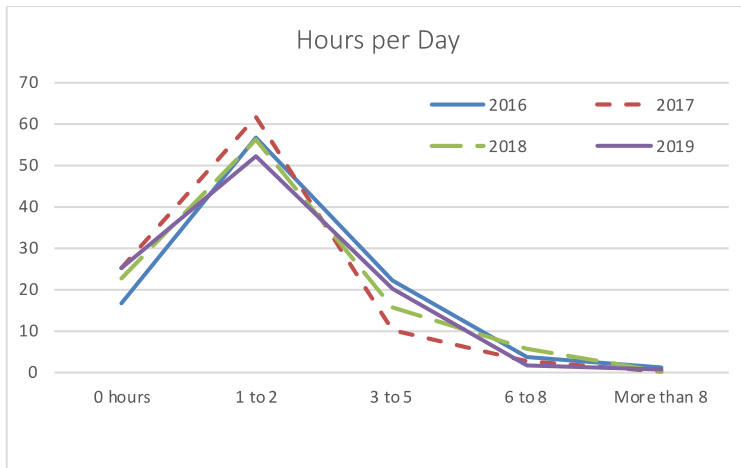
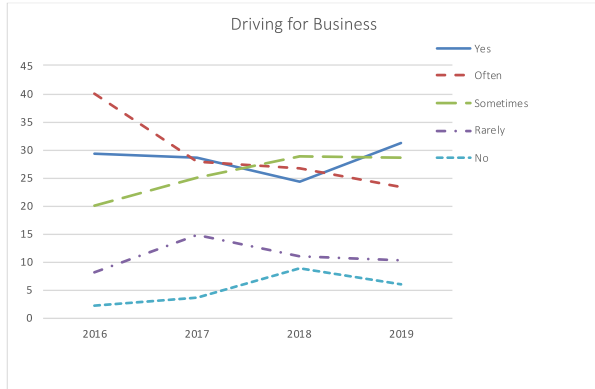


Respondents in 2019 matched 2017 responses very closely. Cycling was not chosen by any Respondent. Those that chose other indicated that they have a home office but travel to clients. Overall, responders mostly live and work South of the Fraser and will drive as part of their commute.

RESPONDENTS WORK RELATED TRAVEL

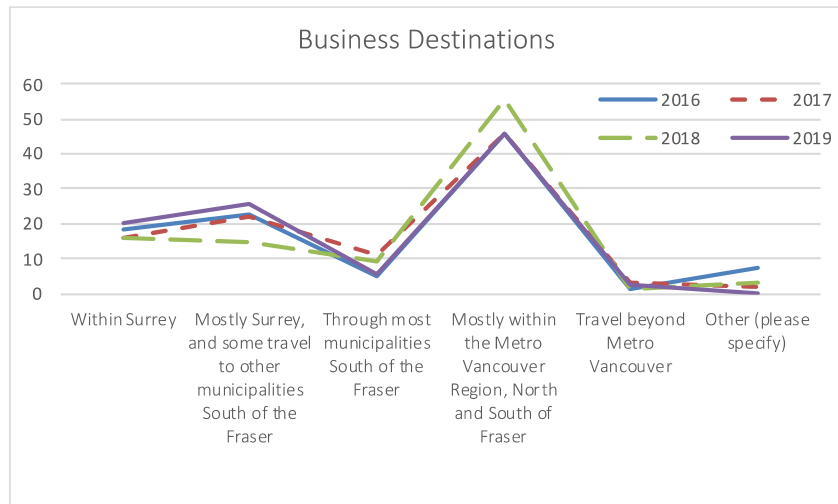
Travelling to and from work as well as heading out to sales calls, meetings, and other errands, can consume a good portion of a workday. With four years of data, we can speculate that there is a trend developing in daily business travel. There was a slight downward trend of those who responded **Yes, Daily** concurrent with more people not driving at all from 2016 to 2018. These numbers increased significantly in 2019.

Concurrently, **those who do not drive at all** were in an upward swing, but that trend seems to be declining in 2019. Those who drive **Sometimes**, defined as driving 2 to 5 times a month, has increased linearly from 2016 to 2018 and tapering off in 2019.



Overall, the pattern for number of hours travelled per day has remained more-or-less the same over the past four years. If we are to garner any conclusions, it is that respondents are not travelling very far for work. Those that spend a lot of time travelling are generally travelling to meet clients, to complete sales, and conduct other types of business.

Respondents who work in Surrey in 2019 travelled farther than Surrey/South Fraser area as part of their business travel. About 10% less for all South Fraser travel (Surrey, mostly Surrey, mostly South Fraser) destinations and an increase of about 10% more travel throughout the Metro region.



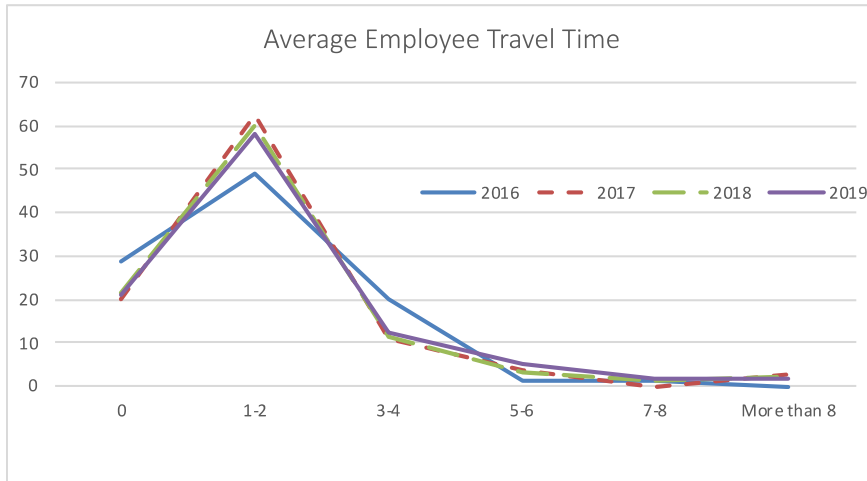
EMPLOYEES TRAVEL FOR BUSINESS

Respondents were asked to assess the work-related travel by other employees in their company or business. In 2018, the category where 21-30% employees travel for work doubled from previous years; an interesting jump given that respondents are starting to travel less overall. However, in 2019 the number of respondents that travel in the 21-30% range was seen to be reduced.



More of the workforce is seen to be travelling for work. The 2019 percentage of respondents travelling

for 91-100% of the workday have not reached 2016 baseline levels but is substantially higher than that of 2017 and 2018. The percentages chosen are “guestimates” made by respondents and are not likely to be an accurate reflection on the travel patterns of a company, particularly a larger business. However, with sufficient data accumulated over the years, a pattern has been emerging.



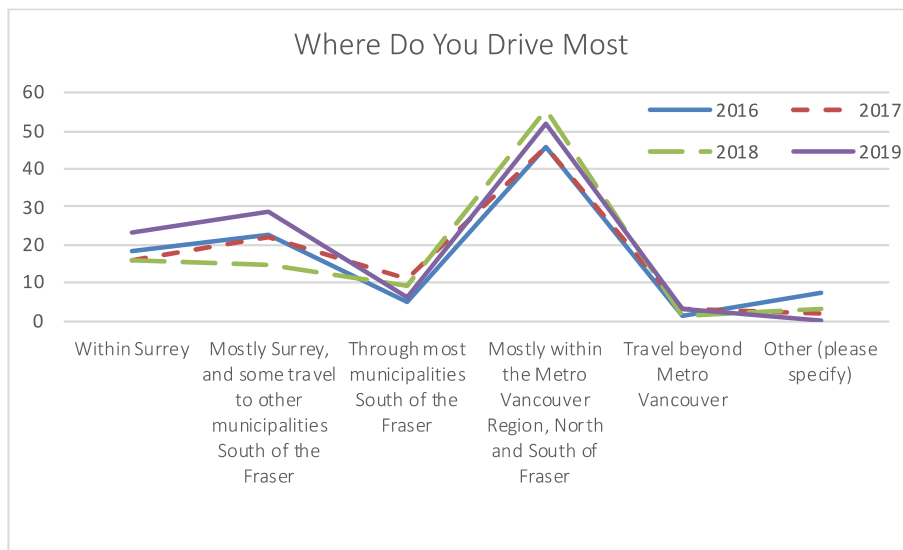
Despite relying on the *guestimations* of respondents, 2017 to 2019 results for the estimated travel time of employees are virtually indistinguishable. In 2017, 2018 and 2019, an increase of over 10% (13%, 11%, and 10% respectively) from the 2016 baseline for 1-2 hours is observable.

“The whole stretch of 148th from 104 Ave is terrible. Same with King George from 104 to South Surrey.”

TRAVEL LOCATIONS

Understanding the places where respondents are driving is an important metric when establishing the validity of data.

The majority of respondents over the last four years have all indicated that they drive within Metro Vancouver, which includes Surrey, Delta, White Rock, Langley (both City and Township), New Westminster, Burnaby, Richmond, Port Coquitlam, Coquitlam, Vancouver, Port Moody, Maple Ridge, and North Vancouver (both the City and Township).



CITY ROADS AND PROJECTS

Each survey features several questions designed by the City of Surrey staff as part of their information gathering. The City of Surrey has a 10-year plan for road improvement projects. Priorities are evaluated annually with major projects taking approximately 3 years, from planning to completion. As these differ annually, there are no comparatives. Respondents were also given an opportunity to recommend projects to the city staff, and many were suggested.

Of the identified projects, respondents were asked to click on their top 3 choices. These are included here in order of preference. For the full table, please go to Appendix 2, page 23.

ROAD CORRIDORS

1. Fraser Highway: Widen to 4 lanes between Whalley Blvd and 148 St, including through Green Timbers Park 53.4%
2. South Surrey/Highway 99 Interchanges: Capacity improvements at key interchanges including 24 Ave, 32 Ave, and 152 St (overpass and widening) 48.9%
3. 152 Street: Widen to 4 lanes from 40 Ave to 50 Ave 46.6%

The corridor chosen by most respondents was likewise, and with a very similar result, chosen by respondents in 2018. This is a priority for businesses.

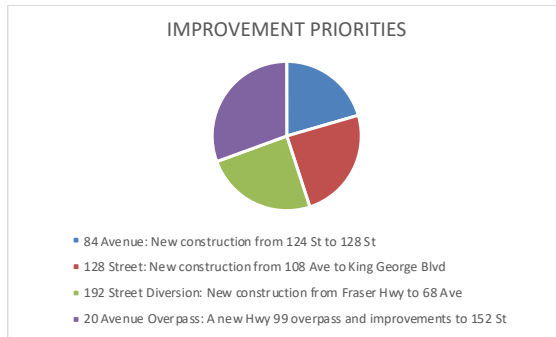
About 25% of the Respondents had suggestions in addition to those provided by the city. There were requests for sidewalks, and one for narrower roads. Most had to do with various stretches of commuter routes that become congested during peak hours and are summarized as follows:

- 152 Street (from 104 down to South Surrey) – widen where needed
- King George Blvd (the entire length) – widen, fix intersections
- 148 St from 64 Ave to Hwy 10

- 192 St at 80 Ave, need advance left signals; between Hwy 10 and 16 Ave should be widened to 5 lanes
- Widen 88 Ave from Fraser Hwy to 200 St
- Widen 156 St to 4 lanes from 104 Ave to Fraser Hwy to relieve congestion on 152 St
- Widen 16 Ave to 4 lanes from 160 St to 192 St
- Another comment to note is to widen 168 Street – 96th Avenue to South Surrey

CONNECTIONS

The City of Surrey has been considering closing several network gaps in order to improve connectivity. Of the choices given, the 20 Ave Overpass was preferred with 192 Street Diversion as second.



Just under 15% of respondents provided alternative choices. Roadways like 72 Avenue, King George Boulevard, Fraser Highway, and 152nd Street were listed most.

“Access to 116 Ave over Hwy 17 – we have one way out and it is often bogged down.”

INTERSECTIONS

Of the 11 choices provided, the following were the top three priorities for Respondents.¹

1. 64 Ave and 168 St	40.2%
2. Fraser Hwy and 184 St	32.1%
3. 24 Ave and 156 St	31.3%

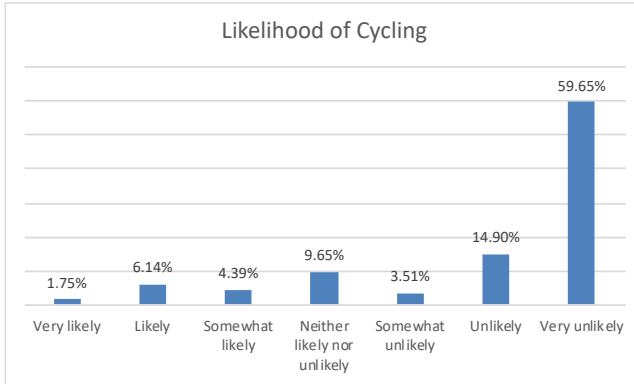
Numerous intersections on King George, Fraser Hwy, and 64 Ave dominated the recommendations by the 16.07% of Respondents who provided additional suggestions.

BIKE SHARING IN SURREY

Innovation is a necessary part of a city’s growth. As a result of many Surrey Board of Trade led initiatives and policies, we added a question to the yearly survey asking respondents whether they would be more likely to bike to work if Surrey had bike sharing. The responses were heavily against with close to 69% of respondents indicated that it is very unlikely.

¹ Totals will not add up to 100 since respondents were asked to choose their top 3

While there is little interest in biking within Surrey to work, there are some that would very likely or somewhat likely consider it (12.28%). With this indication in mind, it is important to understand why these respondents



would or would not cycle to work with bike sharing.

The Surrey Board of Trade released a survey mid 2019 asking about input into TransLink’s Transport 2050 plan. The questions also included one on taking multiple modes to and from work. The main issue that was heard was that the city is not connected enough to allow people to get to work, and that there are not enough jobs within Surrey itself. Additionally, the fact that

transit is so unreliable, and the city is geographically large, cycling is not an option for many.

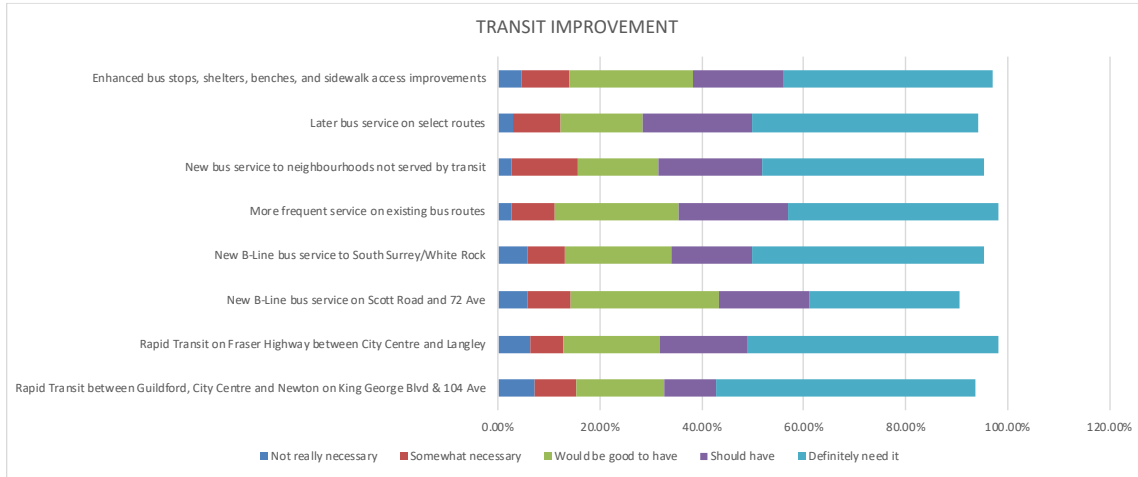
TRANSIT

Respondents rated a number of proposed transit projects that the City of Surrey is considering or has already started to work on. The top three transit improvement projects that respondents indicated we **Should have** and **Definitely Need** include:

1. Rapid Transit on Fraser Highway between City Centre and Langley	66.4%
2. Later bus service on select routes	66.0%
3. New bus service to neighbourhoods not served by transit	63.9%

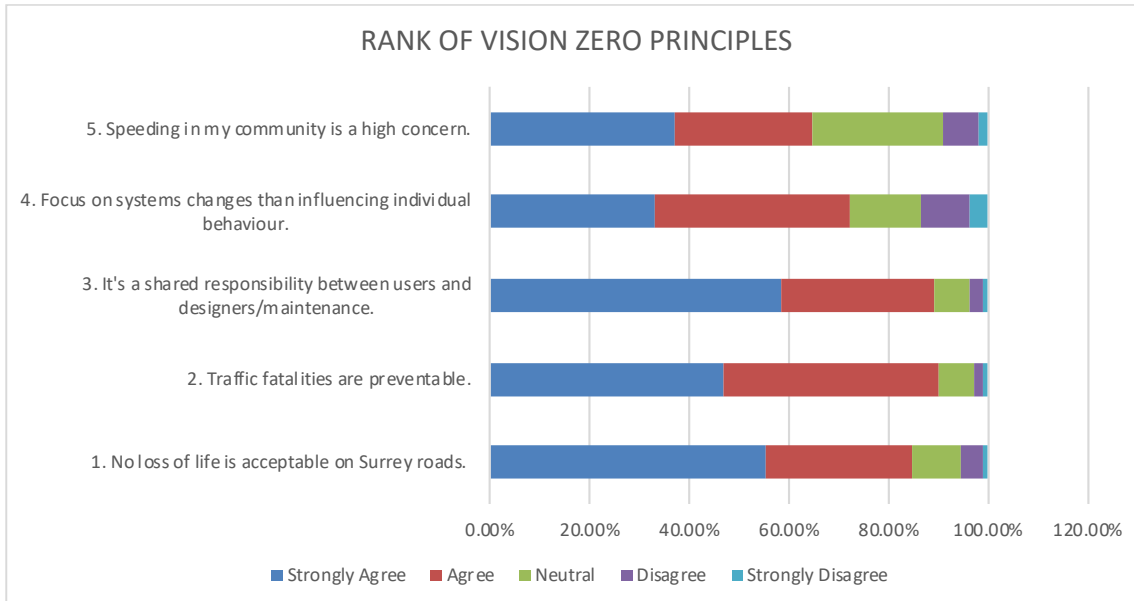
When combined with **Would be good to have**, more frequent service on existing bus routes (86.9%), Rapid Transit on Fraser Highway between City Centre and Langley (85.5%), and enhanced bus stops, shelters, benches, and sidewalk access improvements (83.2%) ranked highest. The debate may be around the technology, but there is no denying a strong need for improved transit in Surrey.

Least favoured, again, is a B-Line bus service along Scott Road, which was reflected in 2017 and 2018. In 2017, the result was 47%, 2018 was 48%, and this year was 7% of Respondents felt that this would be good to have to definitely need it.



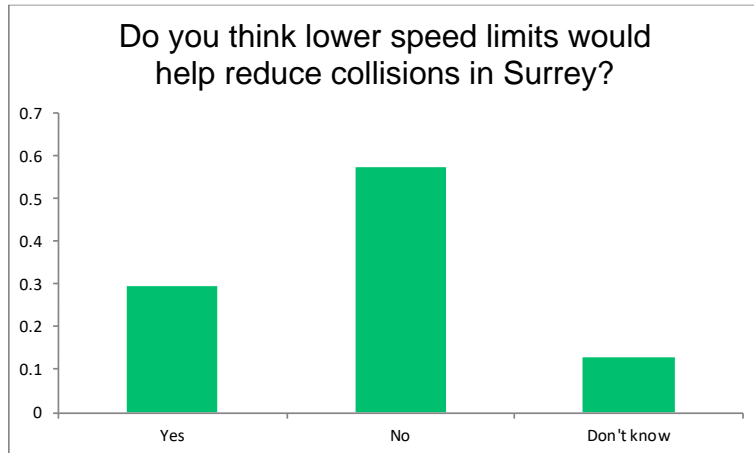
Respondents were given a final opportunity to comment, and many were flagged for future consideration in both the annual survey and the City of Surrey’s planning. Respondents recommended rapid transit and express busses along north-south routes; transit options from Surrey to Port Kells Industrial and Gloucester estates; more bus service in Campbell Heights industrial area; Rapid Transit on 84 Ave between 140 and 176 street; and connecting South Surrey to the Fraser Valley.

ROAD SAFETY



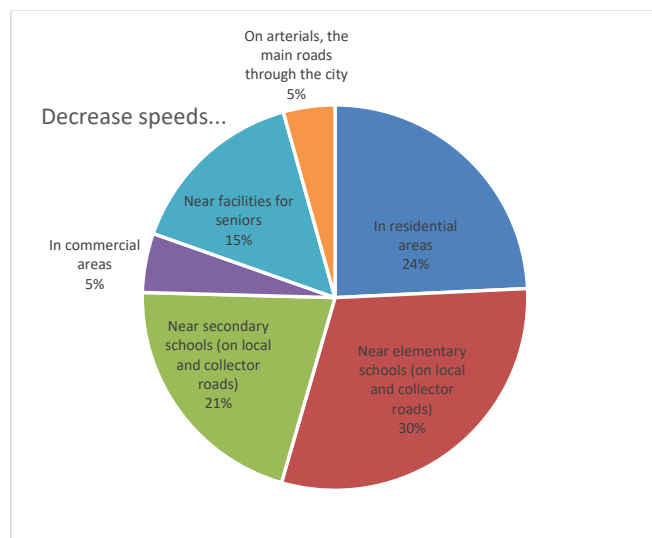
The City of Surrey has launched a Surrey Vision Zero: Safe Mobility Plan. Respondents were asked to contribute their thoughts on how to make Surrey roads safer for all users. For further information on this initiative, go to City of Surrey’s Safe Mobility Plan: <https://www.surrey.ca/city-services/12174.aspx>.

When asked whether **reducing speed limits on some roads would help reduce collision rates in Surrey**, nearly 60% of the respondents said **No**. Only one third said yes and 13% were unsure that such a strategy would work.



However, if the City of Surrey were **to decrease speeds as a safety measure**, respondents were asked to choose their top 3 priorities. The results were not surprising.

About 10% of respondents gave further suggestions. Over 36% of these respondents had a comment on the lack of enforcement. More than 27% of respondents indicated that better driver training is needed. Respondents indicated that most cities are missing sidewalks. This contributes to fatalities and safety concerns in a city.



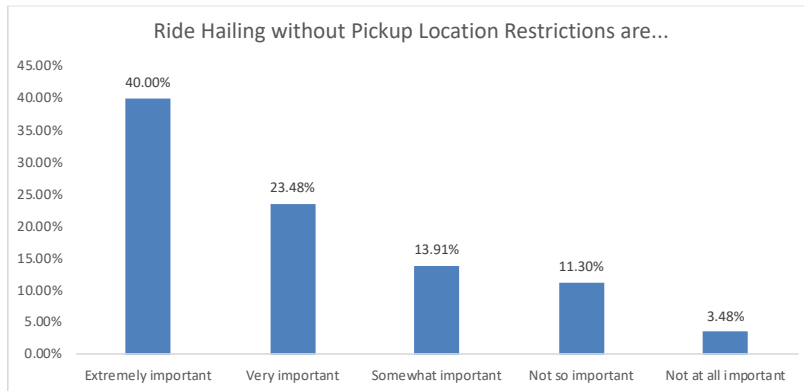
“Surrey is one of the most unwalkable cities in North America, and certainly one of the worst in the Lower Mainland.”

“More traffic policing in high incidence areas, greater consequences, particularly for repeat offenders and road racing.”

RIDE HAILING SERVICES

Ride hailing at the time of this report is only available in Whistler and Vancouver Island. Ridesharing companies have cited concerns about restrictions for pick-up and drop off locations, variable business licensing requirements, and the inability to offer discounts to riders.

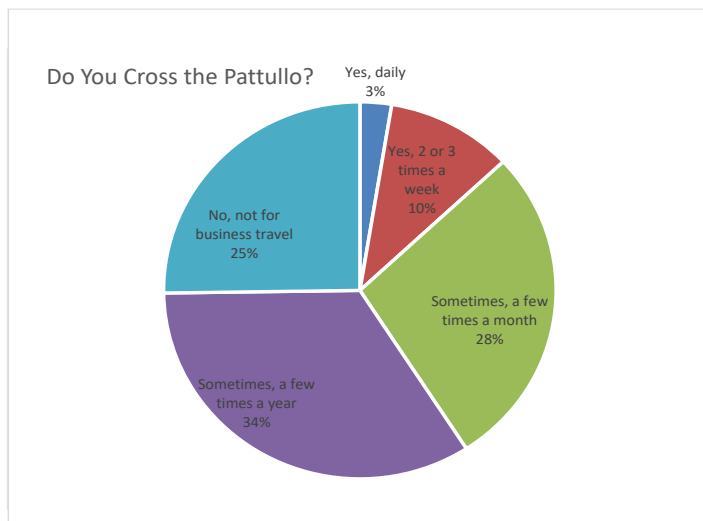
We asked in this survey how important it is to have ride hailing without pickup location restrictions. Nearly 63.5% of Respondents indicated that it is very important and extremely important to them.



MAJOR INFRASTRUCTURE

Bridges, tunnels and highways impact daily travel regardless if the driver is taking those routes. Congestion negatively impacts business. We asked our members whether they traveled across the Fraser River and to give their opinion on how the bridges could be improved.

PATTULLO BRIDGE



Respondents were unequivocal on what they want available on the opening day of a new bridge.

The project is currently planning to have four lanes, along with wide sidewalks and cycling lanes. The new bridge as planned will have the capability of being converted to 6 lanes if required in the future. The Surrey Board of Trade has advocated for six lanes to be available on opening day and this is strongly supported by members.

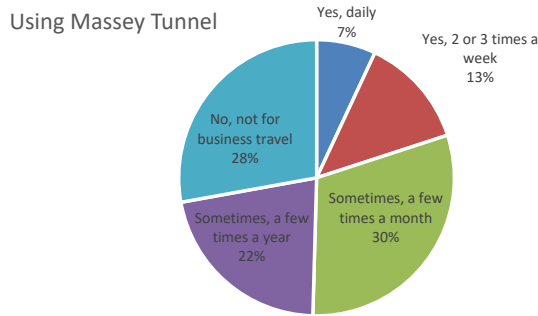
72% of Respondents provided answers to “Any other thoughts on the Pattullo crossing?” up from 42% the previous year.

Three themes dominated:

- Build it wider now to serve future population growth; long overdue
- Consideration for New Westminster road infrastructure and its capacity to absorb 6 lanes of commuters
- Limit trucks to non-peak hours only and limit trucks to right hand lanes only and not allowed to pass other vehicles

“4 lanes is ridiculous and a poor use of funds. Surrey is the fastest growing city and people will travel the bridge for business and pleasure.”

“Needs to be replaced and widened. I have stopped using because of accident risks and also risk of falling down any time.”



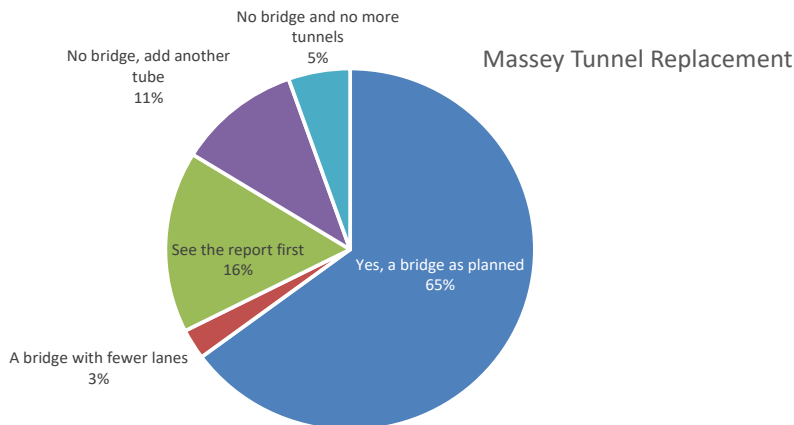
MASSEY TUNNEL

The George Massey Tunnel is 60 years old and connects Delta with Richmond under the Fraser River. It is also the major crossing for those using Hwy 99 through the City of Vancouver to the Peace Arch Border and Hwy 5 in the USA. Highway 5 runs uninterrupted from the Canadian border down to the Mexican border and is arguably West Coast USA’s “backbone.” All of this is to point out

the importance of 10-lane bridge crossing.

No one argues that traffic, especially during peak hours, has far exceeded the tunnel’s capacity. However, there are ongoing debates regarding the Massey Tunnel replacement. About 20% of our Respondents use the tunnel regularly during the week, up by 8% from last year. However, they had strong opinions on what should be done to improve the crossing.

The former Provincial Government administration started work on a 10-lane bridge to replace the tunnel. The



bridge would have 2 lanes (1 north bound, 1 south) for rapid transit, 2 HOV lanes, 2 lanes specific for trucks, wide cycling paths and safe pedestrian sidewalks. The Surrey Board of Trade supported this proposal as many Surrey business members would use the crossing.

Unfortunately, the bridge construction was put on hold by the new Provincial Government.

The new Metro Vancouver Mayors’ Council has opted to recommend an 8-lane tunnel to the Provincial Government.

65% of respondents preferred a bridge that was originally planned with 10 lanes. Those wanting the tunnel itself expanded by adding another ‘tube’ and shoring up the existing tubes numbered only 16%. A bridge with fewer lanes – the current project – was selected by 3% of Respondents.

“I would ultimately like to see a bridge with a dedicated bus lane and an LRT option that would continue down Hwy 99 to South Surrey and then beyond to Langley.”

Very few respondents thought that all crossings, including the Alex Fraser Bridge, the Golden Ears Bridge, and the Port Mann Bridge, were fine as is. The comments for both transit routes (38% Respondents commented) and final comments (24% commented) can be summarized as follows:

- Respondents wanted to improve the connections and arteries before and after bridges
- Feeder routes for the Alex Fraser and Port Mann bridges are needed
- Respondents are concerned about the speed changes on the Alex Fraser
- A comment was made to reactivate the Interurban Passenger Rail and include it as an option in the next survey
- A comment was made to add more bridges
- Install lights at various side-streets to allow people to safely get onto main roads and use roundabouts instead of lights
- Most respondents requested more buses; transit overall needs to be improved
- Transport trucks should be restricted to right lanes only on all crossings; restrict timing
- Add more crossings, not just widen existing ones, e.g., connect the Hwy 91 East-West connector to bottom of Boundary Road
- A cohesive regional plan for transit / traffic flows is needed
- Drivers need to be more attentive
- Pedestrian and cycling infrastructure to be included in planning

“We need planning and action that anticipates population growth needs that results in infrastructure construction WELL IN ADVANCE OF INCREASED DEMAND, not long after the capacity is exceeded”

“Any rapid transit in Surrey MUST be underground. Any above or at level is a total mistake and will create more of a ghetto like image of Surrey. The additional investment for it to be underground is worth the additional property and business taxes Surrey will capture over time and the increased development.”

“I would like to see the region have more cohesive thoughts as to what happens with the traffic flowing between cities. We see too often one city not committing to the best outcome for the other cities involved in the traffic corridor.”

“Trucks should not be allowed on the main roads/bridges, freeway during rush hour. They can travel between 7 PM - 7 AM and 9:30 Am - 2:00 PM. Go like London and charge a fee for commercial vehicles at peak times of day.”

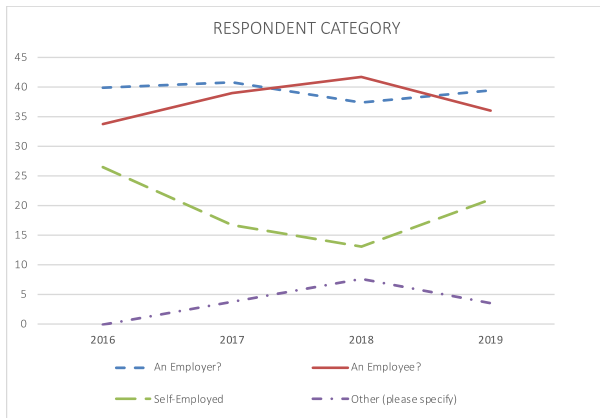
“Driving is a personal responsibility. All collisions are avoidable if one has complete focus on the driving task at hand. The personal responsibility of all other drivers is lacking in most road users.”

APPENDIX 1 – Respondents in Detail

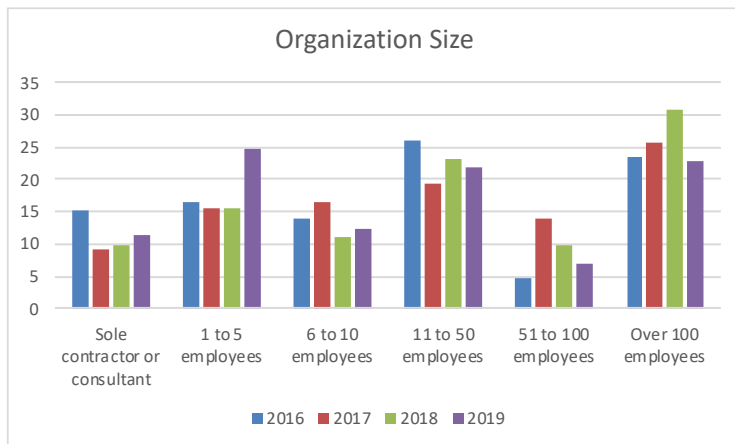
Responding to the survey is voluntary. Who chooses to respond, their industry or sector, and their particular concerns influences the data collected. Three questions are consistently asked for each survey implemented by the Surrey Board of Trade: whether they are employers or employees; how large is the organization for which they work; and, what industry do they work within. All response data is in %.

Measured against our baseline from 2016 (implemented early September), there was a 30% increase in respondents for 2017 (implemented mid- to late October), but only a 7% increase for 2018 (implemented late November to early December). In 2019, we saw a large increase in responses from the 2016 baseline by 35%.

From 2016-2018, there is the beginning of a trend with more employees responding while employers slightly increasing. This is contrasted by 2019 respondents having the second highest number of employers responding to the survey.



The organizations in 2019 shows that the majority of respondents have 1-5 employees, the highest it has been in the past years. It also saw the respondents with employees over 100 return to 2017 levels, lower than that of 2018. Surrey, and the Surrey Board of Trade – are primarily comprised of small to medium sized enterprises² and that is reflected in this survey. There has been a 5% increase in home-based businesses when looking at 2018 compared to 2017, contributing to the increase in 1-5 employee Respondents.³



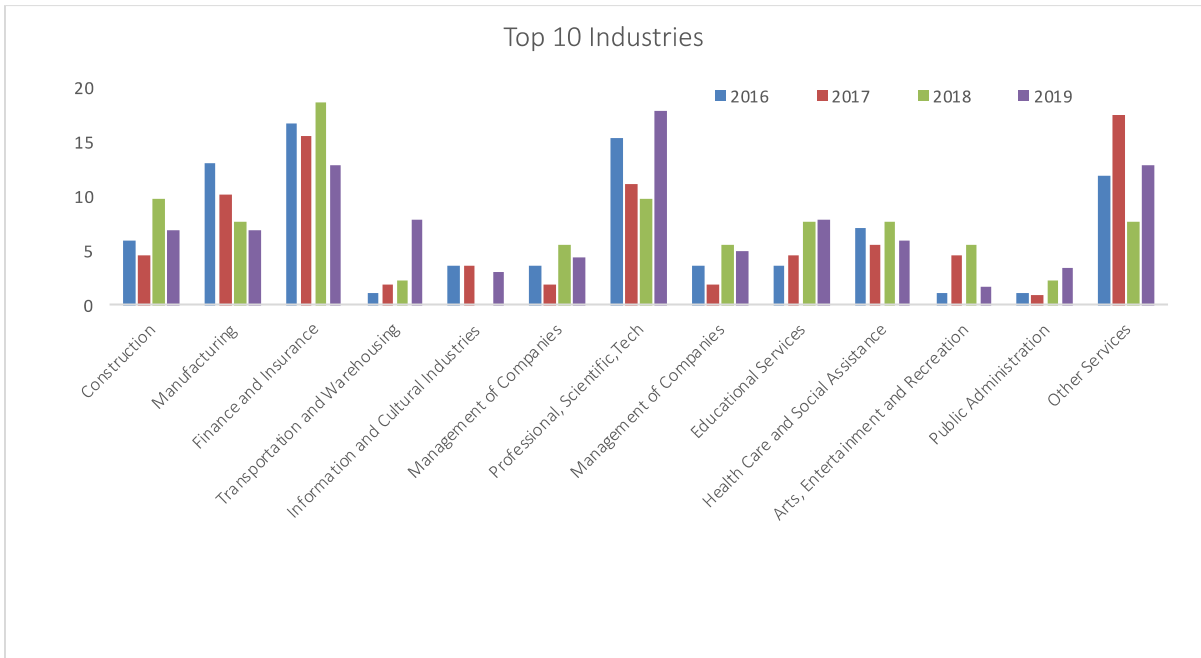
Also tracked are the different fields of industry or business that are represented by respondents. To be consistent, the Surrey Board of Trade uses the North American Industry Classification System (NAICS). NAICS is used by business and government to

² According to the Organization for Economic Cooperation and Development, small firms are comprised of less than 50 employees, while medium enterprises have an upward limit of 250

³ <https://www.surrey.ca/business-economic-development/1498.aspx>

classify business establishments according to type of economic activity (process of production) in Canada, Mexico, and the United States of America.

Respondents have consistently fallen into the same top ten industry or business type from 2016-2018. Five new industries have emerged in this last survey that have not been accounted for in previous iterations including: Transportation and Warehousing; Information and Cultural Industries; Wholesale Trade; Accommodation and Food Services, and; Public Administration. Not surprisingly, they also tend to have employees that will travel throughout their business hours for work related activity.



“The survey does not mention the Interurban Line, which has been overlooked. In order to gauge the effectiveness of transportation and to get a clear picture of the needs, all options must be included in the survey.”

APPENDIX 2 – Responses in Detail

The following are the questions and responses that are asked annually. The numbers are rounded to the first decimal and therefore the total may not add up to 100%. All answers are in percentages unless otherwise indicated.

RESPONDENTS

Are you:	2016	2017	2018	2019
An Employer?	39.8	40.7	37.4	39.5
An Employee?	33.7	38.9	41.8	36
Self-Employed, Contractor, Consultant?	26.5	16.7	13.2	21.2
Other (please specify)	0	3.7	7.7	3.5

For 2019, **Other** comments included variants of “Film and entertainment consultant re transportation,” “Employed,” “Frequent user,” or “retired journalist, doing volunteer chaplaincy support at SFU Surrey Interfaith Centre.”

SIZE OF ORGANIZATION BY NUMBER OF EMPLOYEES

How many individuals (including FT, PT, casual, temporary/term, and regular contractors) are employed by your company?	2016	2017	2018	2019
Sole contractor or consultant	15.3	9.2	9.9	11.4
1 to 5 employees	16.5	15.6	15.4	23.6
6 to 10 employees	14.1	16.5	11.0	12.3
11 to 50 employees	25.9	19.3	23.1	21.9
51 to 100 employees	4.7	13.8	9.9	7
Over 100 employees	23.5	25.7	30.8	22.8

RESPONDENTS BY INDUSTRY – TOP 10

Which category would best describe your company? (NAICS based choices)	2016	2017	2018	2019
Construction	6	4.6	9.9	7
Manufacturing	13.1	10.2	7.7	7
Finance and Insurance	16.7	15.7	18.7	13

Transportation and Warehousing	1.2	1.9	2.2	7.8
Information and Cultural Industries	3.6	3.7	0	3
Management of Companies	3.6	1.9	5.5	4.4
Professional, Scientific, Tech	15.5	11.1	9.9	18
Management of Companies	3.6	1.9	5.5	5
Educational Services	3.6	4.6	7.7	7.8
Health Care and Social Assistance	7.1	5.6	7.7	6

COMMUTING IN SURREY

How you get to and from work is as much a part of your workday as your business needs.

The choices below focus on Surrey. Do you:	2016	2017	2018	2019
Live and work in Surrey	51.8	51.9	51.6	53
Live in Surrey, work South of Fraser	4.7	6.5	4.4	3.5
Live in Surrey, work in Metro Vancouver	7.1	7.4	8.8	8.7
Live in Surrey, work outside Metro Vancouver	1.2	2.8	1.1	0.9
Work in Surrey, live South of Fraser	14.2	10.2	9.9	17.4
Work in Surrey, live in Metro Vancouver	10.6	10.2	12.1	6.1
Work in Surrey, live outside Metro Vancouver	0.0	3.7	0.0	2.6
Live and work outside Surrey	2.4	3.7	3.3	7
Other	8.2	3.7	9.9	1

How do you usually get to work?	2016	2017	2018	2019
Drive own vehicle	87.1	92.6	81.3	92.9
Use transit	4.7	0.9	4.4	0.9
Cycle	0.0	0.0	1.1	0
Walk	2.4	0.9	6.6	1.8
Carpool	1.2	1.9	2.2	2.7
Other	4.7	3.7	4.4	1.8

The **Other** Respondent in 2019 indicated that they have a home office but travel to clients.

RESPONDENTS WORK RELATED TRAVEL

Do you usually travel during your workday as part of your job? E.g., sales calls, goods deliveries, customer services, etc.	2016	2017	2018	2019
4 or more days per week	29.4	28.7	24.4	31.3
Often, at least 2–3 days per week	40.0	27.8	26.7	23.5
Sometimes, at least 2 to 5 days per month	20.0	25.0	28.9	28.7
Rarely, once a month or less	8.2	14.8	11.1	10.4
None	2.4	3.7	8.9	6.1

Not including your commute to work, roughly how many hours do you travel a day as part of your business?	2016	2017	2018	2019
0 hours	16.5	25.2	22.5	25.2
1 to 2	56.5	61.7	56.2	52.2
3 to 5	22.4	10.3	15.7	20
6 to 8	3.5	2.8	5.6	1.7
More than 8 hours a day	1.2	0	0	0.9

If you drive for business purposes where do you do most of your driving?	2016	2017	2018	2019
Within Surrey	18.1	16.0	15.9	20.4
Mostly Surrey, and some travel South of Fraser	22.9	22.0	14.8	25.7
Through most municipalities South of Fraser	4.8	11.0	9.1	5.3
Mostly within Metro Vancouver, north & south	45.8	46.0	55.7	46
Travel beyond Metro Vancouver	1.2	3.0	1.1	2.7
Other	7.2	2.0	3.4	0

EMPLOYEES TRAVEL FOR BUSINESS

Roughly what percentage of your company's workforce travel as part of their workday?	2016	2017	2018	2019
1-10%	35.7	35.8	25.6	29
11-20%	8.3	14.7	14.4	16.7
21-30%	9.5	9.2	18.9	6.1
31-40%	3.6	5.5	2.2	4.4
41-50%	7.1	4.6	6.7	8.8
51-60%	7.1	7.3	11.1	4.4
61-70%	2.4	1.8	3.3	1.8
71-80%	2.4	6.4	4.4	6.1
80-90%	3.6	4.6	4.4	9.7
91-100%	20.2	10.1	8.9	13.2

Not including commuting time, roughly how many hours per day does the average employee in your company spend travelling for business?	2016	2017	2018	2019
0 hours	28.6	20.2	21.6	25.2
1 to 2 hours	48.8	62.4	60.2	52.2
3 to 4 hours	20.2	11.0	11.4	20
5 to 6 hours	1.2	3.7	3.4	1.7
7 to 8 hours	1.2	0.0	1.1	0.9
More than 8 hours	0.0	2.6	2.3	25.2

CITY ROADS AND PROJECTS

City roads, intersections, and projects change annually. All data are in percentages unless otherwise indicated. Results have been rounded to the first decimal and may not add up to 100%. Further, the options have been re-ordered to reflect order of choices.

Indicate which of the following Road Corridors would be your top 3 priorities for improvement – please choose only 3

Fraser Highway: Widen to 4 lanes between Whalley Blvd and 148 St, including through Green Timbers Park 52.2

32 Avenue: Widen to 4 lanes from Croydon Dr to 188 St	23.5
64 Avenue: Widen to 5 lanes between 176 St and Fraser Hwy	34.8
132 Street: Widen to 4 lanes between 71 Ave and 96 Ave	24.4
152 Street: Widen to 4 lanes from 40 Ave to 50 Ave	43.5
South Surrey/Highway 99 Interchanges: Capacity improvements at key interchanges including 24 Ave, 32 Ave, and 152 St (overpass and widening)	53.9

The City is considering plans for new road connections to improve connectivity and mobility and complete network gaps. Indicate which of the following would be your top 3 priorities for improvement – please choose only 3.

84 Avenue: New construction from 124 St to 128 St	43.5
128 Street: New construction from 108 Ave to King George Blvd	51.9
192 Street Diversion: New construction from Fraser Hwy to 68 Ave	51.9
20 Avenue Overpass: A new Hwy 99 overpass and improvements to 152 St	64.8

Indicate which of the following Road Intersections would be your top 3 priorities for improvement – please choose only 3

24 Ave and 156 St	31.6
32 Ave and 140 St	25
60 Ave and 148 St	13.4
64 Ave and 168 St	40.2
82 Ave and 128 St	17.9
88 Ave and Harvie Rd	18.8
104 Ave and 154 St	25
104 Ave and 156 St	25.9
108 Ave and 144 St	15.2
108 Ave and Oriole Dr	4.5
Fraser Hwy and 184 St	32.1

BIKE SHARING IN SURREY

How likely would you be to cycle to work if Surrey had bike sharing?	
Very likely	1.8
Likely	6.1
Somewhat likely	4.4
Neither likely nor unlikely	9.7
Somewhat unlikely	3.5
Unlikely	14.9
Very unlikely	59.7

RAPID TRANSIT

Please rate the following transit improvement options:	Not really necessary	Somewhat Necessary	Would be good to have	Should have	Definitely Need it	Last Two Columns Added
Rapid Transit between Guildford, City Centre and Newton on King George Blvd & 104 Ave	7.3	8.2	17.3	10	50.9	60.9
Rapid Transit on Fraser Highway between City Centre and Langley	6.4	6.4	19.1	17.3	49.1	66.4
New B-Line bus service on Scott Road and 72 Ave	5.7	8.5	29.3	17.9	29.3	47.2
New B-Line bus service to South Surrey/White Rock	5.7	7.6	20.8	16	45.3	61.3
More frequent service on existing bus routes	2.8	8.4	24.3	21.5	41.1	62.6
New bus service to neighbourhoods not served by transit	2.8	13	15.7	20.4	43.5	63.9
Later bus service on select routes	2.8	9.4	16	21.7	44.3	66.
Enhanced bus stops, shelters, benches, and sidewalk access improvements	4.7	9.4	24.3	17.8	41.1	58.9

"We need space for buses to pull out so they don't impede traffic."

ROAD SAFETY

The City of Surrey Surrey Vision Zero: Safe Mobility Plan.

Rank your level of agreement with the following Vision Zero principles to make Surrey roads safe.	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	First 2 columns added – out of 100%
No loss of life is acceptable on Surrey roads. Zero is the only target worth aiming for.	55.4	29.5	9.8	4.5	0.9	84.8
Traffic fatalities and serious injuries are preventable.	46.9	43.4	7.1	1.8	0.9	90.3
Eliminating fatalities and serious injuries is a shared responsibility between road users and those who design and maintain our roads.	58.4	31	7.1	2.7	0.9	89.4
Safety work should focus on systems-level changes (i.e., shaping policies systems, and Surrey's built environment) more than influencing individual behaviour (i.e., the traditional education approach).	33	39.3	14.3	9.8	3.6	72.3
Speeding in my community is a high concern.	37.2	27.4	26.6	7.1	1.8	64.6

Do you think lower speed limits would help reduce collisions in Surrey?

Yes	29.6
No	57.4
Don't know	13

On what types of roads would lower speeds be acceptable to you? Check your top 3 priorities

In residential areas	65.8
Near elementary schools (on local and collector roads)	82

Near secondary schools (on local and collector roads)	56.8
In commercial areas	13.5
Near facilities for seniors	41.4
On arterials, the main roads through the city	11.7
Other suggestions?	9.9

RIDE HAILING SERVICES

How important is it to you to have ride hailing services without pickup location restrictions?

Extremely important	40
Very important	23.5
Somewhat important	13.9
Not so important	11.3
Not at all important	3.5

MAJOR INFRASTRUCTURE

There are few crossings over the Fraser River, and if one or two have an incident during peak travelling times, i.e., rush hour, then the back-up is felt throughout the feeder routes. We asked our Respondents to consider two projects and give their opinion on what they think ought to be done.

PATTULLO BRIDGE

Do you use the Pattullo Bridge while travelling for business?

Yes, daily	5.5
Yes, 2 or 3 times a week	6.6
Sometimes, a few times a month	23.1
Sometimes, a few times a year	34.1
No, not for business travel	30.8

Plans to replace the Pattullo Bridge are well underway. However, the new bridge will be a 4-lane crossing when opened. Should it be a 6-lane crossing on opening day?

Yes	79.1
No	11

Don't know	10.4
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GEORGE MASSEY TUNNEL

Do you use the Massey Tunnel while travelling for business?	
Yes, daily	7
Yes, 2 or 3 times a week	13
Sometimes, a few times a month	30.4
Sometimes, a few times a year	21.7
No, not for business travel	27.8

The current Mayor's Council has approved a plan to replace the existing tunnel with a new tunnel that will have the same number of lanes for the public but with two transit lanes.

What is your opinion? Please choose one of the following:	
Yes, I would like to see the Massey Tunnel replaced with a bridge as planned	62.6
Yes, I would like a bridge to replace the tunnel, but with fewer lanes	2.6
I would like to see the results of the provincial report before deciding	15.7
No bridge, add another tube to the Massey tunnel and upgrade existing ones	10.4
No bridge and no more tunnels, upgrade the existing ones	5.2

"We need planning and action that anticipates needs and that results in infrastructure construction well in advance of increased demand, not long after the capacity is exceeded."

inclusive | innovative | independent

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