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CONSUMER LOGO 

INTRO

CONTRARY TO WHAT WE MIGHT THINK, CANADIAN COMMUTERS ARE ACTUALLY MUCH MORE LIKELY TO LOOK FORWARD TO THEIR COMMUTE THAN TO DREAD IT. IN FACT, TO THE EXTENT THAT COMMUTING HAS ANY IMPACT ON CANADIANS' HEALTH AND WORK, HOME, AND SOCIAL LIVES, IT IS A RESOUNDINGLY POSITIVE ONE.



Drivers are least likely to think their commute is the most stressful part of their day, in part because their commutes tend to be shorter and in less dense communities.

Transit users tend to face a more difficult commute, but use their commuting time to rest and relax, and report being exposed to more interesting, entertaining and useful advertising.

ABOUT THE STUDY

For the 23rd Consumerology Study, a nationally representative sample of 1,500 Canadians were asked about their commutes, defined as “a regular commute where you travel from your home to another location, such as work or school or volunteering, at a set time”. 82% of the sample qualified as commuters. Other studies on commuting often only deal with commutes to work – although our findings are in line with other studies such as those by Statistics Canada, this distinction should be kept in mind.

Among our sample of commuters, one quarter arrive at their final destinations in less than 15 minutes and two-in-five take 15-30 minutes. So while two thirds of Canadian commuters have a commute of 30 minutes or less, one third have

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commutes over 30 minutes. As their primary mode of transportation, half said they drive a car, truck or van, 25% use public transit (15% bus or streetcar, 8% subway or elevated train, 2% commuter train), 14% are automobile passengers and the remainder walk (6%) or bicycle (2%).

COMMUTING IS GOOD FOR YOU (?!)

Canadian Commuters, as a whole, experience commuting very differently than the media lead us to believe. Canadian commuters are three times more likely to look forward to their commutes than to dread them. Three quarters report they are usually in a better mood after their commute. Everything from commuters' mental, emotional, and physical health and their work, home, and social lives are six times more likely to be positively affected by the commute than to be negatively affected by it.

Only 15% of commuters said their commute is the most stressful part of their day, and only one-in-five said they are frustrated with how much time they spend commuting each day. **We can confidently lay to rest the myth of the grueling, unhealthy, and soul-crushing Canadian commute. At most, one-in-ten commuters have a dreadful and unhealthy commute.**

DENSITY, MODE AND DURATION

Density, mode of transportation, and duration of commute all had significant impacts on the way Canadians feel about their commute. Those commuting to or from rural communities generally had more positive experiences with commuting, while those coming from or going into urban communities were more likely to have negative experiences. Similarly, those who mostly drive were more positive than those who primarily depend on public transit. Tying both of these factors together is the fact that urban transit commutes tend to be longer, whereas driving in rural or suburban areas tend to be shorter. Only commuters who face a commute over an hour long (regardless of mode) are as likely to dread their commute as they are to look forward to it.



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The major exception to the rural/urban divide is that those who are able to walk or bicycle for their commute tend to have very enjoyable and short commutes, despite being almost entirely confined to urban areas.

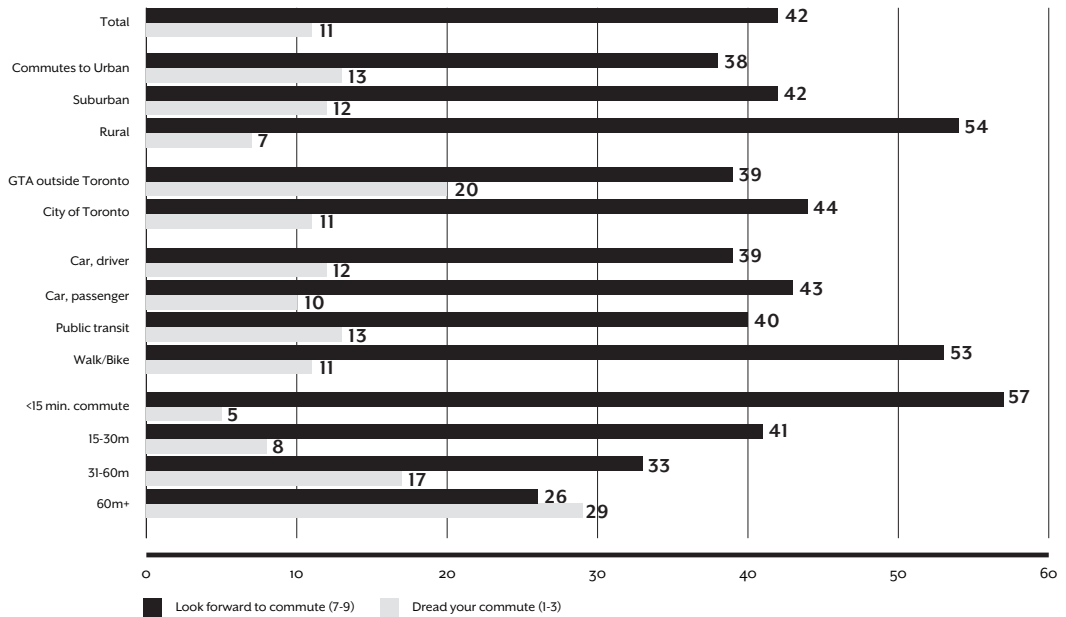
An oversample conducted in the Greater Toronto Area echoes these trends. Since commutes in the GTA tend to be longer, are more likely to be on public transit and are in denser communities (relative to the national average), attitudes are a bit more negative but still overwhelmingly positive on balance. GTA commuters are slightly less likely to be in a better mood after their commute (72%) relative to the national average (77%), and are slightly more likely to dread their commute (16% GTA vs. 11% national). Similarly they are more likely than the national average to report that their commute has negative impacts on their health, although commutes still have a strongly net positive impact on health.



Interestingly, outer GTA commuters are almost twice as likely to dread their commutes as City of Toronto residents, in spite of the fact that they are twice as likely to drive, tend to have shorter commutes, and are more likely to live in and commute to suburban rather than urban communities.

Feelings Before Commute

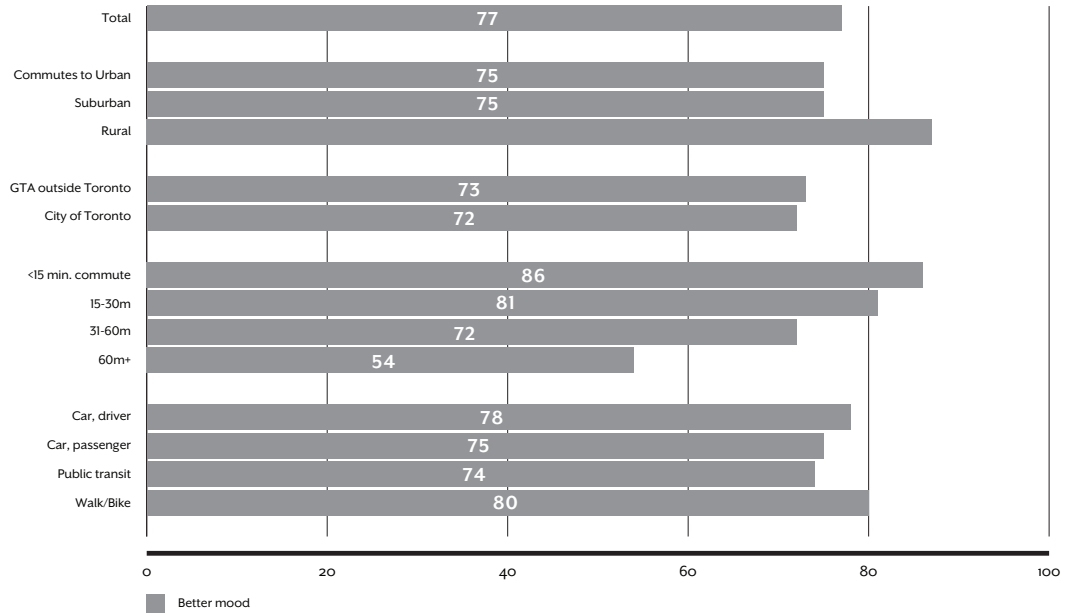
And on a scale from 1 to 9 where 1 means you dread your commute and 9 means you look forward to your commute, how do you usually feel about your commute?



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Feelings After Commute

And after your commute, generally speaking, would you say you are usually in a...



COMMUTING GOALS AND IDEALS

Three quarters of Canadian commuters say they would prefer to be alone during their commute than with others. Not surprisingly then, even among transit users, driving is considered to be the ideal mode of commuting, assuming that cost and accessibility were not a factor.

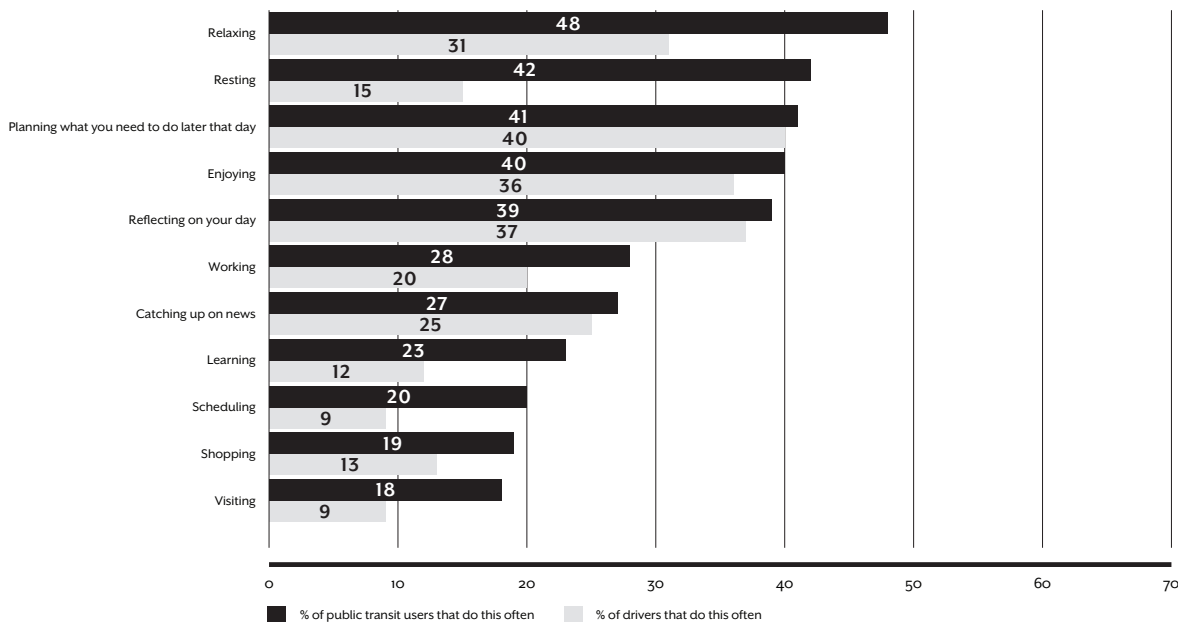
As a result of this alone time, drivers are slightly more likely to strongly agree (56%) that their commute is an opportunity to have some quiet time by themselves, than transit users (49%).

Although driving is the most commonly-mentioned “ideal” mode of commuting among all commuters, transit users are actually much more likely to relax and rest on their commute, relative to drivers.

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To Do's during Commute – Transit & Drivers

And would you say that given your current method of commuting, in addition to the commute itself, how often is each of the following the aim of what you are doing?



GENDERED COMMUTE INTERRUPTIONS

The only aspect of commuting in which there is a significant difference between the sexes is the kinds of activities for which they interrupt their commutes. Women are more likely to often interrupt their commutes to run household or personal errands (50%) and go shopping (42%), relative to men (38% and 33% respectively). When running errands, women more often go to pharmacies (66%) and grocery stores (46%), while men are more likely to often stop at convenience stores (59%), liquor or other alcohol retailers (39%), and sporting goods (32%) stores.

MEDIA CONSUMPTION

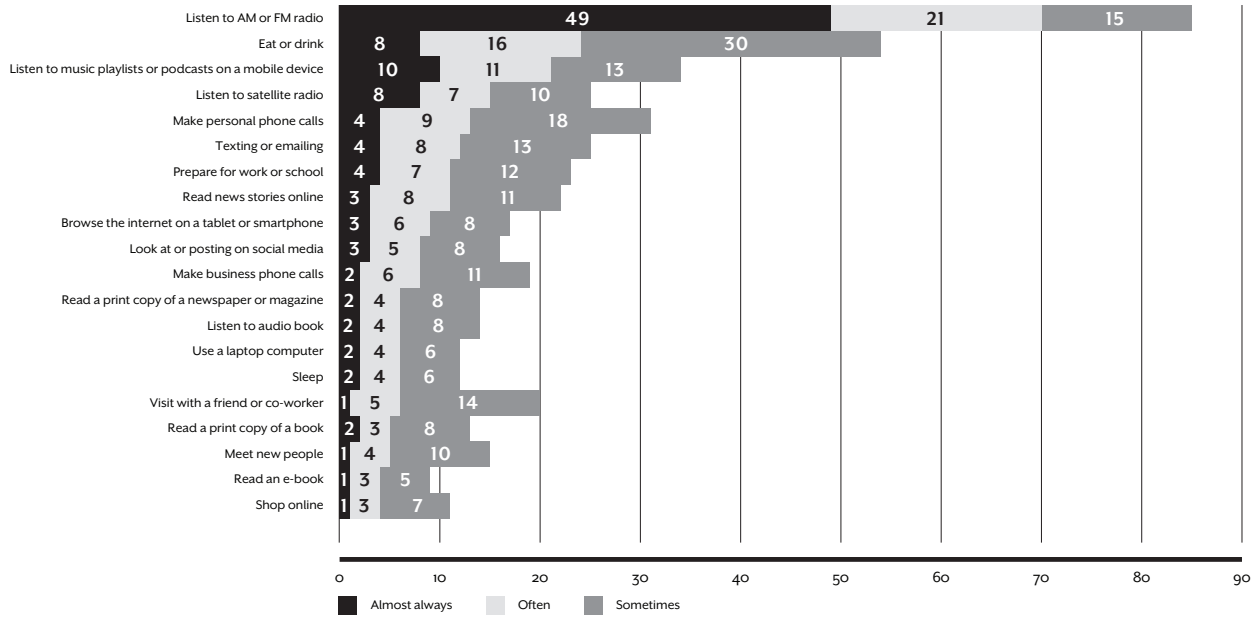
As we might expect, the media consumption habits of commuters significantly depends on the mode of transportation.

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Nearly three quarters of drivers say they listen to AM or FM radio often, if not always. This is by far the most popular activity for drivers while commuting. Only one-in-five listen to music they own or playlists they have curated, and only 15% say they listen to satellite radio often.

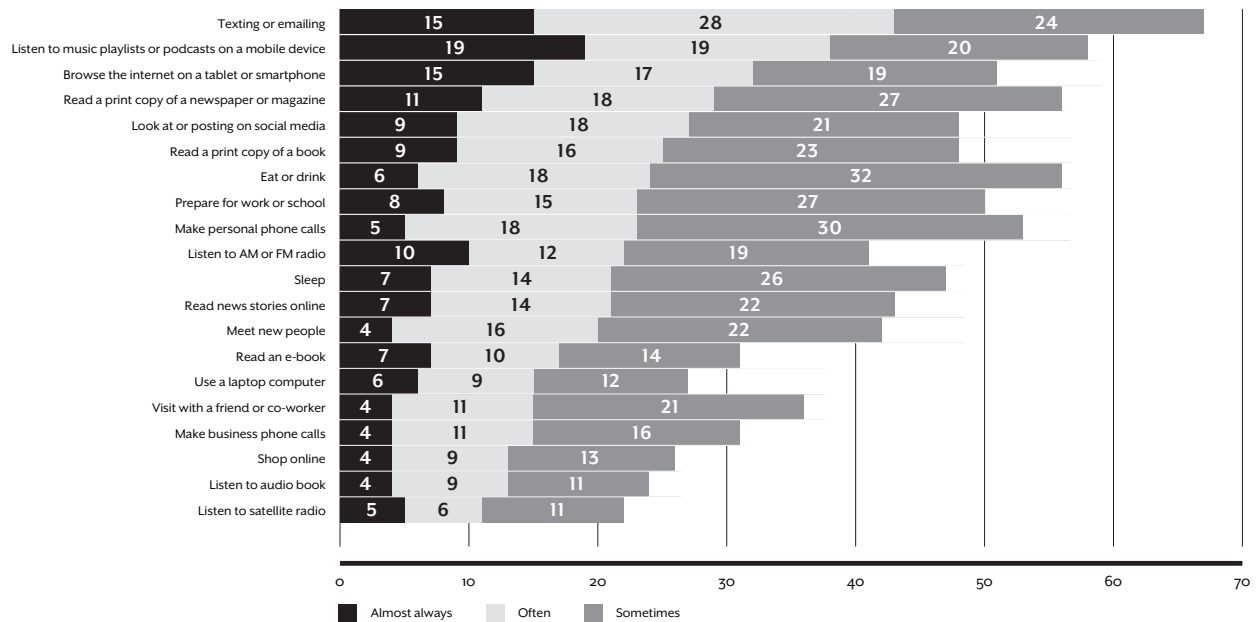
Frequency of Media Consumption Among Drivers

Given your current method of commuting, how often do you do the following during your commute?



Frequency of Media Consumption on Public Transit

Given your current method of commuting, how often do you do the following during your commute?



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Public transit users, in contrast, tend to consume a much wider range of media. One quarter of transit commuters often send text messages or email, listen to personal music or podcasts, browse the internet on tablets or smartphones, read a print newspaper or magazine, look at social media, or read a (print) book.

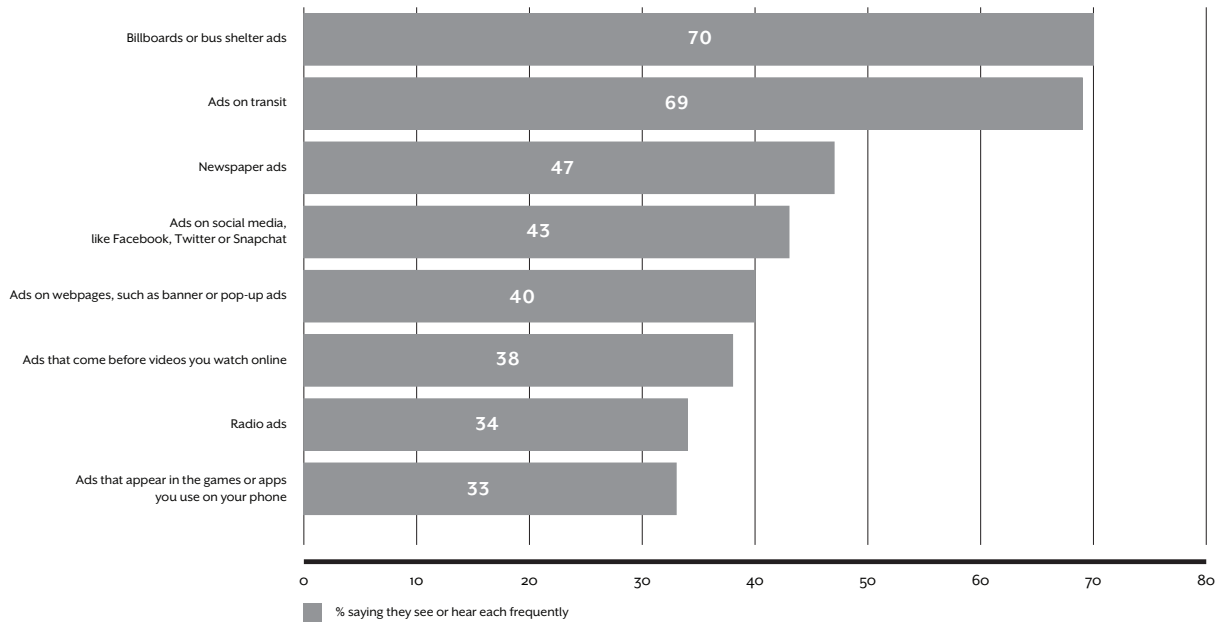
ADVERTISING EXPOSURE

Not surprisingly, most public transit users are exposed to billboards or bus shelter ads and ads on transit while the majority of drivers are frequently exposed to radio ads.



Exposure to Types of Ads – Transit

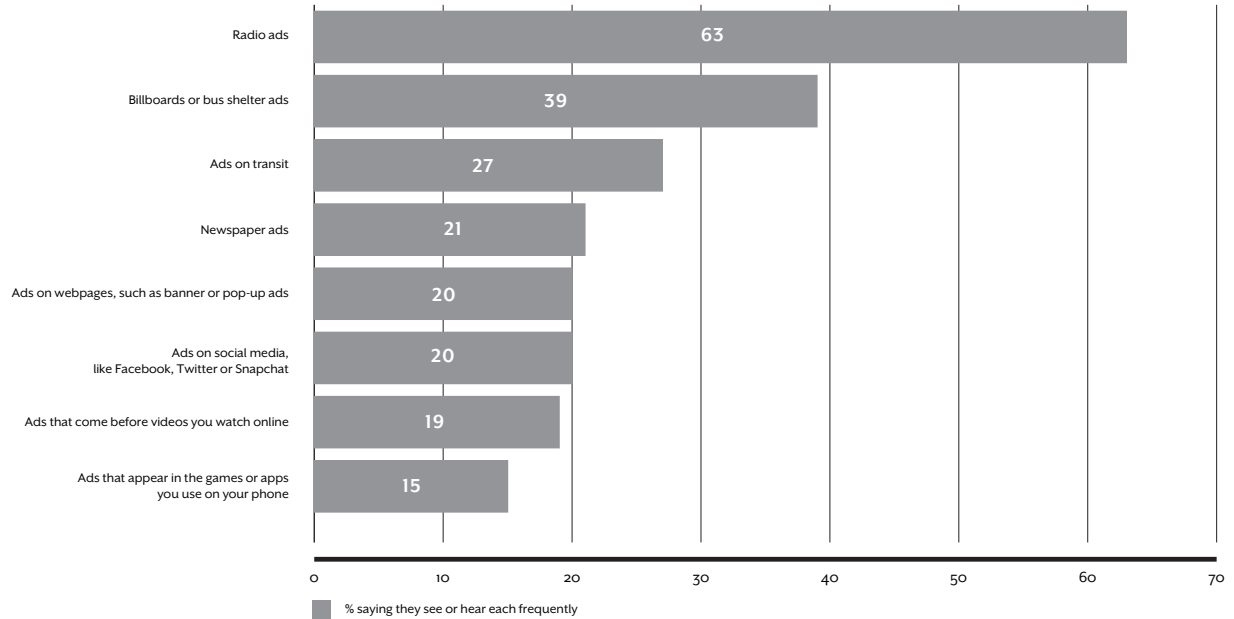
Thinking about the advertisements you see or hear during your commute, how frequently do you recall seeing the following types of advertisements?



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Exposure to Types of Ads – Drivers

Thinking about the advertisements you see or hear during your commute, how frequently do you recall seeing the following types of advertisements?



Only one-in-five Canadian consumers said they see or hear too many ads during their commute. One third see an acceptable amount, and another third say they see very few, if any, ads. Transit users are less likely to think they see or hear too many ads, relative to drivers, and are also nearly twice as likely to report seeing or hearing interesting, entertaining, and useful ads, relative to drivers.

In terms of advertising content, the presence of humour, discounts or deals, or products or services they find useful are most likely to make commuters view an ad favourably.

In short: radio advertisers need to make their spots more interesting, useful, and in tune with the ‘alone time’ mentality of car commuters.

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WE NEED TO UNDERSTAND WHAT COMMUTING MEANS TO CANADIANS

We need to accept that not only is commuting a generally positive time of peoples' day, it is important alone time that Canadians use to unwind or prepare themselves for the next phase of their day. The demands of our work and personal lives are as intense as they are different. Having some time to relax and rest, or a few quiet moments to reflect on your day and plan what you need to do next is what makes commuting so important.

Whether one is seeking to engage commuters with advertising, media content, personal interaction, or commerce, it is crucial to bear in mind that commuters are seeking useful information, relaxation, or time and space to themselves. The better we understand this mind-frame, the better we can connect with Canadian commuters.



METHODOLOGY

The findings discussed in this report are based on an online survey conducted by The Gandalf Group, among 1,500 Canadian (n=1,212 commuters), proportionate to the gender, age and regional distribution of the Canadian population. We also surveyed Quebec in proportion to the province's distribution of English and French speakers. The survey was conducted September 17th to 29th, 2014, in both English and French. An oversample of n=500 GTA residents was conducted November 10th to 13th, proportionate to the gender and age distribution of the region.