

Metro Vancouver Regional Parks Visitor Survey 2019







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Foreword

Introduction

- Metro Vancouver currently operates 22 regional parks, 5 regional greenways, 2 ecological conservancy areas and 3 regional park reserves that are composed of over 13,557 hectares of regional park land and receive approximately 11.7 million visits annually. As a result, data on outdoor recreation demand and visitor satisfaction is a key input to the efficient planning and delivery of the regional parks service.
- Currently, an in-house research program tracks visitation to regional parks using a network of trail counters strategically located within the park system. In order to provide additional inputs to planning, design and operation of regional parks, Metro Vancouver conducts various other surveys. One such survey, completed in 2013, was the Regional Park Visitor Survey. This survey established a standard methodology for visitor satisfaction surveys in order to better track changes over time.

- In 2019, Metro Vancouver engaged Mustel Group to conduct an updated visitor survey with the following objectives:
 - track changes in recreational supply and demand;
 - gather public attitudes towards outdoor recreation for the region;
 - better understand the trends related to visitor use patterns, demographic profile and attitudes.
- More specifically, the survey records information on:
 - o park visitor origin,
 - recreational activities they take part in while visiting regional parks, and
 - satisfaction with the services and experiences obtained during their visit.
- In order to track changes from 2013 the version, the 2019 survey uses the same approach, sampling and methodology designed in 2013, intercepting general users of or visitors to the various park locations throughout the region.

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Methodology

Methodology

- The 2019 survey followed the three-phase design from 2013 as closely as possible:
 - 1. Developing the questionnaire and random sampling of survey sites.
 - 2. Conducting the onsite data collection.
 - 3. Processing, analyzing and reporting the resulting data.
- Phase 1: Metro Vancouver provided the questionnaire used in 2013 with a series of recommended edits and updates. These changes were incorporated for a final questionnaire which was printed into a four-sided booklet for self-completion by park visitors (appended to this report).
- Metro Vancouver then provided an updated list of **parks** (most of which were surveyed in 2013) that addressed additions and deletions to the Metro Vancouver park system since 2013. A schedule was created based on that used in 2013. Each park was surveyed four times throughout a 3-month period (June, July and August 2019) and had either one, two, three or four different intercept points or locations where surveys were conducted.
- The interviewing schedule aimed to assign each park with 2 weekend days and 2 weekdays and ensure that each one was surveyed at least once in each of the three months. Survey days were split into a six-hour morning shift (8am 2pm) and a six-hour afternoon/evening shift (2pm 8pm).

- Phase 2: As in 2013, to complete the data collection, one survey interviewer per park, per shift was stationed at a location recommended by Metro Vancouver. The role of the interviewer was to engage with visitors as they passed, explaining the reason for the survey and encouraging participation. All parties encountered at a sample site were invited to participate in this study, except where single-family parties were identified, where only one member was asked to participate. People who declined to participate were thanked for their time and were not engaged further.
- Engaged visitors completed their survey on paper and then, during quiet periods of the shift, the interviewer entered the data onto a hand-held device (tablet). The data was later uploaded allowing for monitoring of constantly updated survey data throughout the survey period.
- Phase 3: On completion of the 3-month fieldwork period the collected data was checked against the hard-copy surveys for accuracy and completeness. Once cleaned, the data was processed, with results tabulated and analyzed. An overall report of findings was produced with data aggregated from all surveyed parks. A separate report was then created for each individual park, and where possible, comparisons were made to results from the 2013 survey.

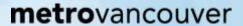




Regional Park and Greenway Results

This report contains the aggregated results of survey data collected at 21 regional parks and 4 regional greenways. The data is then broken out and presented for each park individually.

- A total of 1,287 surveys were completed amongst visitors to the
 25 regional parks and greenways.
- All parks and greenways surveyed in 2013 were surveyed in 2019 except for Matsqui Trail.
- In 2019, two additional parks were surveyed, Grouse Mountain and Surrey Bend Regional Park.
- While each park and greenway has its own individual report of results, the following report summarizes survey results by question at the regional park system level and provides a snapshot of visitor data for all regional parks and greenways included in the survey. It further compares, where appropriate, results from the 2013 survey and notes any significant differences.
- Results from a random sample of n=1,287 completed surveys yields a margin of error of +/- 2.8% at the 95% confidence level.
- Results for questions with sample sizes of less than 30 respondents should be interpreted with caution.





Regional Park System: Highlights

Most Common Activities Top Three Reasons for Visit Walking/ hiking 85% Appreciate nature 72% Average # of dogs 1.3 Nature/ wildlife viewing 33% Activity with friends/family 63%

Main Method of Travel



74% took a private vehicle with an average # of 1.9 people

Missing Facilities at Parks



Visitors most commonly asked for more or better washrooms.

Importance and Satisfaction of Facilities at Park



Of the four most important facilities, visitors are least satisfied with protected environmental areas and washrooms

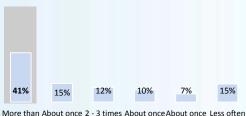
Sense of Safety Within Park



95% of visitors to all parks said they felt safe within the regional park

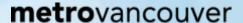
Total Surveys completed All Parks: n=1,287

Frequency of Visiting Regional Parks



once a a week a month a month every two
week months

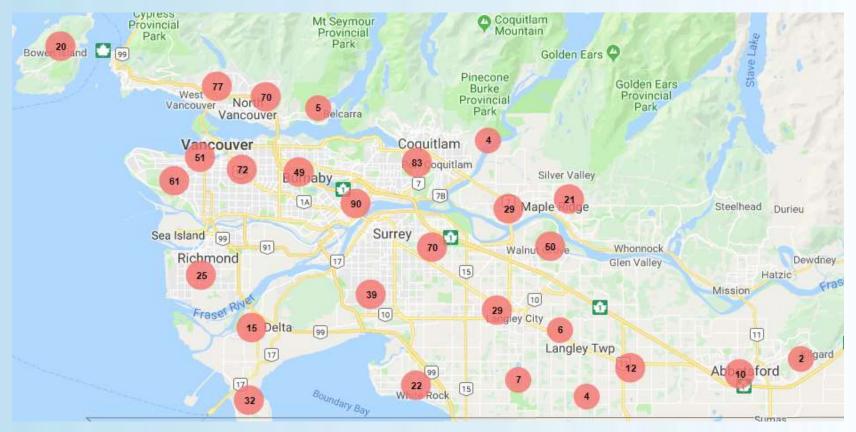
Four-in-ten visitors to all parks completing a survey are frequent visitors – once a week or more.

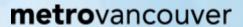




Regional Park System: Visitor Origin

The map below plots the postcodes of visitors to any of the regional parks and greenways who completed a survey and provided a valid postcode. While most postcodes are mapped here, those not identified by the mapping tool do not appear on the map. The following slide lists all respondent origin communities and compares the 2019 regional distribution of respondents to that of 2013.







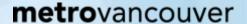
Regional Park System: Respondent Communities

Base: Total 2019 respondents	Total <u>2019</u> (1,287) #	Total <u>2019</u> (1,287) %
Community		
Abbottsford	14	1%
Burnaby	65	5%
Coquitlam	89	7%
Delta	67	5%
Langley	97	8%
Maple Ridge	49	4%
New West	47	4%
North Vancouver	138	11%
Bowen Island and Sunshine Coast	27	2%
Pitt Meadows	21	2%
Port Moody	21	2%
Richmond	34	3%
Surrey	143	11%
Vancouver	198	15%
West Vancouver	23	2%
White Rock	8	1%
Outside Metro Vancouver	19	1%
Not Stated	227	18%

Base: Those providing a valid postcode	Total Answering <u>2019</u> (1,060)	Total Answering <u>2013</u> (2,792)
Region		
Burrard Peninsula	32%	28%
South Shore	21%	21%
North Shore	18%	13%
Fraser Valley	10%	16%
North East Sector	10%	11%
Ridge Meadows	7%	6%
Outside Metro Vancouver	2%	5%

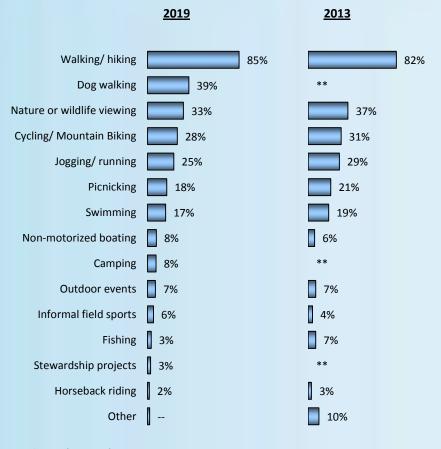


1. Regional Park System Detailed Findings





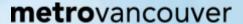
Regional Park System: Most Common Activities



Base: Total 2019 (n=1,287) Total 2013 (n=3,035)

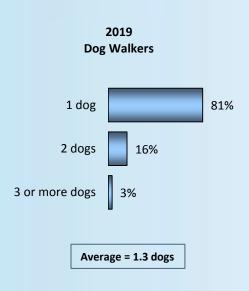
- As in 2013, the most common activity among visitors to regional parks in 2019 is walking or hiking (85%).
- This year, about four-in-ten of those completing a survey also came to walk their dog or dogs (39%), a category not included in the 2013 survey.
- Also generally consistent with 2013, one-third this year visited the park for nature and wildlife viewing, more than one-quarter for cycling, onequarter jogging or running, and almost one-in-five picnicking or swimming.
- Other activities, each engaged in by fewer than one-in-ten include camping, outdoor events, field sports, fishing, stewardship and horseback riding.
- In 2013, a total of 31% of respondents said either cycling or mountain biking (the net total of the two activities). As "mountain biking" was not included as a category on the 2019 questionnaire, those who were mountain biking would have categorized their activity as "cycling".

Q.1) Please indicate the activities that you most commonly do at this regional park/ greenway?





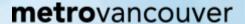
Regional Park System: Number of Dogs Visited With



 The large majority of those walking dogs had just one dog with them on the day of the survey (81%), with an overall average of 1.3 dogs per visitor.

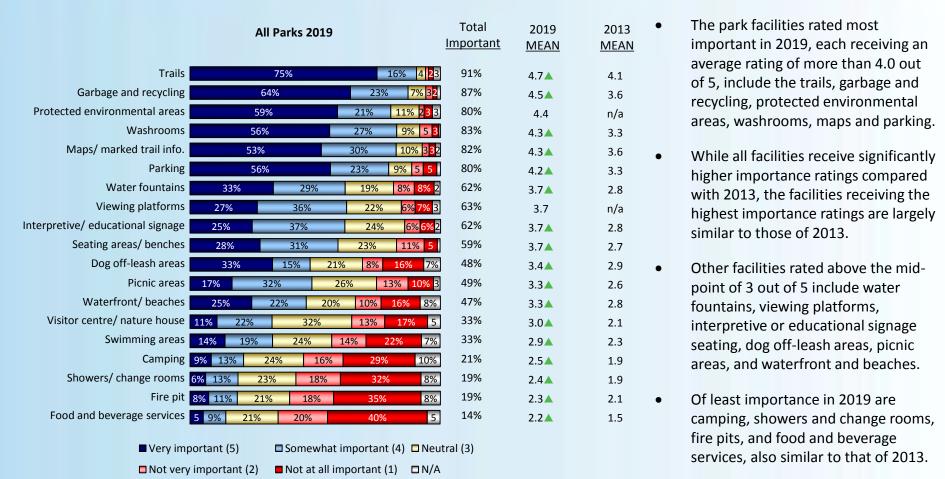
Base: Total 2019 Dog Walkers (n=418)

Q.1b) If you indicated "dog walking", how many dogs did you visit with?

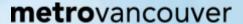




Regional Park System: Importance of Facilities

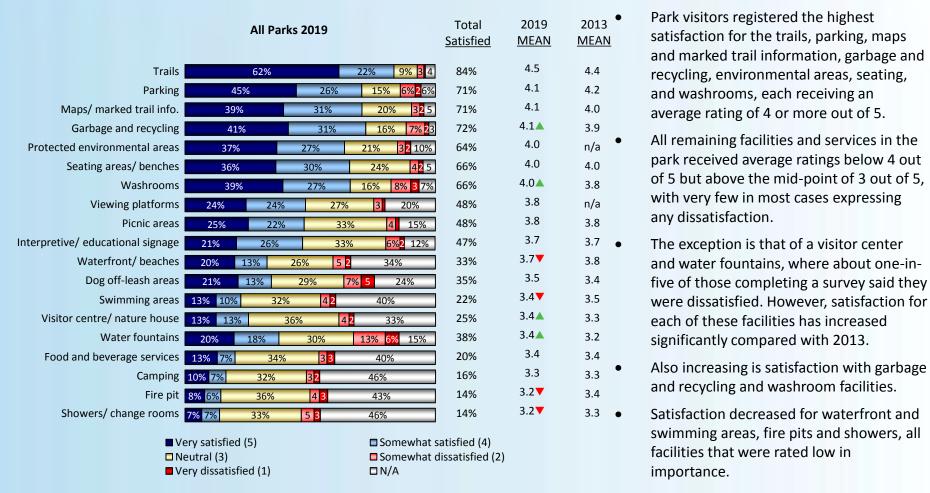


Base: Total 2019 (n=1,204 – 1,268) Total 2013 (n=2,902)





Regional Park System: Satisfaction with Facilities



Base: Total 2019 (n=1,044 – 1,125) Campbell Valley 2013 (n=2,741)



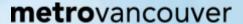


Importance vs. Satisfaction with Facilities

Quadrant Analysis

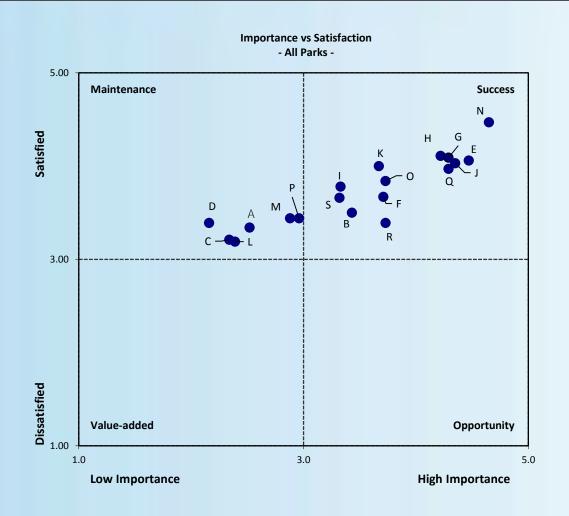
- The next slide shows a simple quadrant analysis of average importance scores and average satisfaction rating scores for the various facilities and services at the park or greenway.
- Average importance scores for each park facility or service are plotted on the horizontal X axis, while visitor satisfaction with each of those facilities or services are plotted on the vertical Y axis.
- The result plots each facility or service within one of the four grids depending on how important the facility or service was considered and how satisfied visitors are with that facility or service.
- Top Right high importance and high satisfaction: Facilities or services appearing in the top right quadrant received satisfaction and importance ratings higher than the mid-point of the five-point scale. They are important and visitors are currently satisfied with them on average, so important to maintain.
- Bottom Right high importance and low satisfaction: Facilities or services appearing in the bottom right quadrant received importance ratings higher than the mid-point of the five-point scale, but low satisfaction ratings. These are important to visitors and require attention.

- Top Left low importance and high satisfaction: Facilities or services appearing in the top left quadrant received satisfaction ratings higher than the mid-point of the five-point scale but are low in importance. Visitors are happy with them, but they are less important, so good to maintain.
- Bottom Left low importance low satisfaction: Facilities or services appearing in the bottom left quadrant received importance ratings lower than the mid-point of the five-point scale and low satisfaction ratings. These are not generally important to visitors and would be an added value if provided or improved.





Regional Park System: Importance vs. Satisfaction

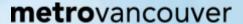


Important - Work to Maintain

- N. Trails
- E. Garbage and recycling
- J. Protected environmental areas
- Q. Washrooms
- G. Maps/marked trail information
- H. Parking
- O. Viewing platforms
- R. Water fountains
- F. Interpretive/educational signage
- **K.** Seating areas/ benches
- B. Dog off-leash areas
- I. Picnic areas
- S. Waterfront beaches

Not Important - Maintain if Possible

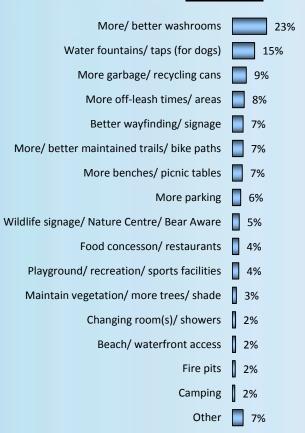
- P. Visitor center/ nature house
- M. Swimming areas
- A. Camping
- **L.** Showers/ changing rooms
- C. Fire pit
- D. Food and beverage services/ concession



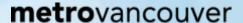


Regional Park System: Missing Facilities

All Parks 2019



- Less than one-third of all park visitors felt that a facility of service was missing from the park (29%).
- Of those visitors who felt something was missing from the park, the most common suggestion was that they could use more or better washrooms, such as flush toilets (23%).
- The next most common requests were for more water (drinking) fountains or taps for dogs (15%).
- Some of the other examples of requests, each noted by fewer than one-in-ten of those who felt something was missing, equating to just a few visitors in each case, include more garbage and recycling receptacles, more offleash times or areas, improved wayfinding signage, better maintenance of trails and bike paths, more seating and more parking.





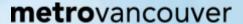
Regional Park System: Importance of Environmental Protection



 Almost all visitors to regional parks who completed a survey feel that protection of the natural environment is important to their enjoyment of the park (99%), with most saying it is "very" important.

Base: Total 2019 (n=1,246)

Q.4) How important is the protection of the natural environment at this park/greenway to enjoyment of your visit today?





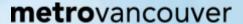
Regional Park System: Connection to Nature



 Almost all visitors to regional parks who completed a survey feel more connected to nature by being in the park (95%).

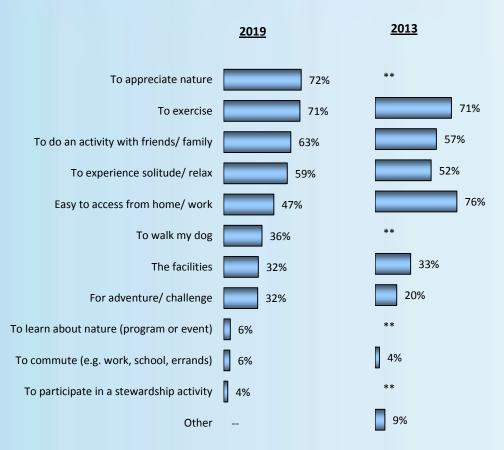
Base: Total 2019 (n=1,211)

Q.5) Does being in a regional park make you feel more connected to nature?





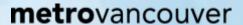
Regional Park System: Reasons for Visiting Regional Parks



- The most common reasons for visiting a regional park in 2019, each cited by more than half of all visitors, are to appreciate nature (an option not included in the 2013 survey), for exercise, to engage in an activity with friends or family, and to relax and experience solitude.
- Each reason cited in 2013 is given by a similar proportion of visitors in 2019, with the exception that less than half of all visitors in 2019 say they visit due to the easy access to the park from home or work compared with three-quarters giving this reason in 2013 (76%). It should be noted, in 2013 this category appeared at the top of the answer list for this question but appeared towards the end of the list in 2019, so likely impacting respondents' likelihood to choose it.
- As in 2013, one-third cites use of the park facilities as motivating them to visit, with a similar proportion visiting for the adventure or challenge (32%, up from 20% in 2013).

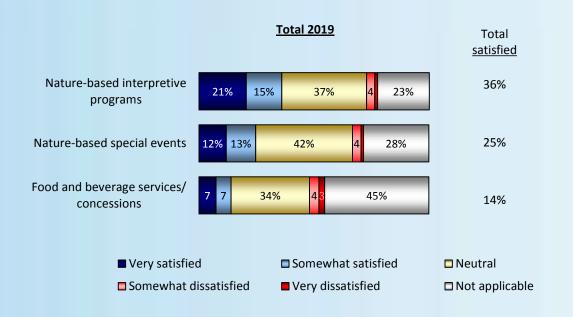
Base: Total 2019 (n=1,247) Total 2013 (n=2,928)

Q.7) From the list below, indicate why you visit this regional park/ greenway (check all that apply):





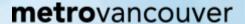
Regional Park System: Satisfaction with Specific Services



Among regional park visitors that completed a survey and provided a rating, most were either satisfied or neutral with nature-based interpretive programs, special events, and food and beverage services or concessions, with fewer than one-in-ten in each case expressing any dissatisfaction.

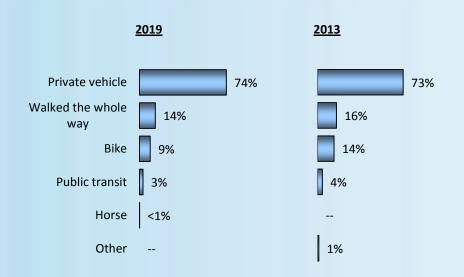
Base: Total answering 2019 (n=1153 / 1137 / 1129)

Q.8) How would you rate your satisfaction with the following services provided in this regional park/ greenway?



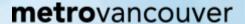


Regional Park System: Method of Travel to Regional Parks



- As in 2013, the majority of visitors to the park in 2019 traveled there in a private vehicle (74%), with 14% saying they walked the whole way.
- Slightly fewer visitors completing the 2019 survey reportedly traveled by bicycle (9% versus 14% in 2013).
- Just 3% traveled by public transit in 2019, similar to that reported in 2013 (4%).

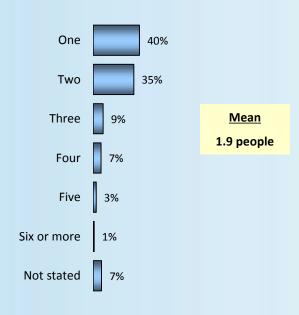
Base: Total 2019 (n=1,236) Total 2013 (n=2,938)





Regional Park System: Number of People in Vehicle

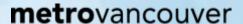
Those Traveling in a Private Vehicle



 In 2019, each private vehicle used to travel to a park carried an average of approximately two people (1.9).

Base: Total 2019 – those traveling in a private vehicle (n=917)

Q.9b) Number of people in vehicle?





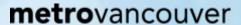
Regional Park System: Trouble Accessing Parks



 The large majority of those completing a survey in 2019 had no problem accessing the park.

Base: Total 2019 (n=1,236)

Q.10) Did you have trouble accessing this park today?

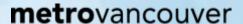




Regional Park System: Reasons for Trouble Accessing Parks

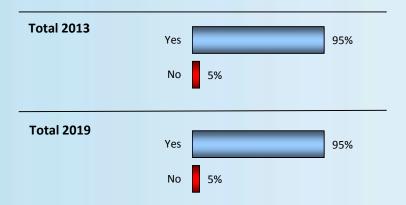
	,
Base: Those who had trouble accessing the park	Total <u>2019</u> (41)
Parking issues/ need more parking/ parking not safe	42%
Wayfinding issues/ poor signage	24%
Poor access in general/ not paved/ gate closed	12%
No bike lane/ connection/ access	10%
Pedestrian crossing issues/ dangerous/ no crossing	7%
Wildlife concerns / bears in area	5%
Q.10) Did you have trouble accessing this park today? Why w	as that?

- For the few that encountered an issue access the park it was most commonly due to difficulty with finding adequate or safe parking (42%).
- Some reported issues with poor signage, while others encountered more general issues such as locked gates, inadequate bike or pedestrian access or encounters with wildlife.



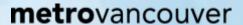


Regional Park System: Sense of Safety Within Parks



 Just as in 2013, almost all visitors to a regional park in 2019 feel safe there (95%).

Base: Total 2013 (n=2,861) Total 2019 (n=1,253)

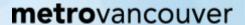




Regional Park System: Reasons for Feeling Unsafe

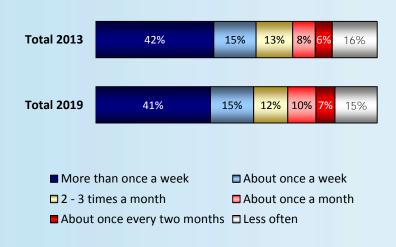
Base: Those who felt unsafe in the park	Total <u>2019</u> (64)
Don't feel safe alone/ isolated/ dark/ need cameras	31%
Wildlife concerns / bears in area	20%
Off-leash dogs uncontrolled	8%
Drug/ alcohol users/ smokers/ homeless	8%
Other criminal/ suspicious activity	8%
Vegetation/ landscaping/ trail maintenance/ prickles	6%
Thieves/ car crime	5%
Encounters with cyclists	5%
Wayfinding issues/ poor signage	2%
Not stated	16%
Q.11) Do you feel safe in this park/ greenway? Why is that?	

- For the few that said there were times they felt unsafe in the park it was most commonly due feeling unsafe when visiting alone, particularly in isolated areas and when it was dark.
- Next most common were concerns about encounters with wildlife such as bears.
- Other concerns (each raised by fewer than one-in-ten respondents) include encounters with off-leash dogs, suspicious or criminal behavior such as drug use, car crime and a need for landscaping.
- A few also had encounters with speeding cyclists and inadequate signage.





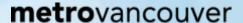
Regional Park System: Frequency of Visiting Regional Parks



- Overall, frequency of visiting regional parks among respondents in 2019 largely reflects that of 2013.
- More than two-thirds visit at least 2 to 3 times a month or more (68%, compared with 70% in 2013), including more than half who visit once a week or more (56%, compared with 57% in 2013).

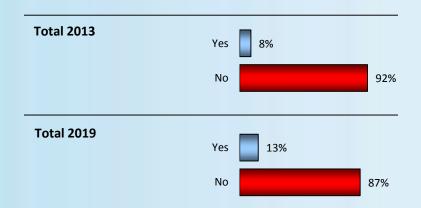
Base: Total 2013 (n=2,903) Total 2019 (n=1,244)

Q.12) How frequently do you visit this regional park/ greenway?





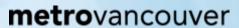
Regional Park System: Too Crowded



 While most visitors to a regional park in 2019 felt the park was not too crowded (87%), the proportion that do feel the parks are too crowded increased from 8% in 2013 to 13% currently.

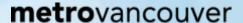
Base: Total 2013 (n=36) Total 2019 (n=1,217)

Q.13) Do you feel this park/ greenway is too crowded?





Demographics





Regional Park System: Demographic Profile

	Total <u>2019</u> (1,287)	Total <u>2013</u> (3,040)
Gender		
Male	47%	46%
Female	48%	50%
Other	1%	•
Prefer not to say	5%	4%
Age		
Under 24	4%	10%
25 to 40	19%	20%
41 to 60	36%	43%
Over 60	28%	20%
Not answered	13%	7%
Country of birth		
Canada	67%	67%
UK/Europe	12%	12%
Elsewhere	13%	17%
Not answered	8%	4%
Language(s) spoken at home		
English only	70%	n/a
Other	20%	n/a
Not answered	10%	n/a

- In 2019, visitors responding to the survey were quite evenly balanced between males and females, though as in 2013 responses came mostly from those aged over 40 (64%).
- Most of those park visitors responding were born in Canada and speak only English at home.
- Those from elsewhere in 2019 came from a wide variety of countries including, among others, Australia, China and other parts of South East Asia, South America, India, the United States and Mexico.





Regional Park System: Demographic Profile

	Total <u>2019</u> (1,287)	Total <u>2013</u> (3,040)
Employment status		
Employed full time	52%	54%
Employed part time	10%	10%
Not currently working	2%	3%
Homemaker	2%	3%
Retired	26%	18%
Student	3%	5%
Not Answered	5%	7%

- More than half of visitors to regional parks in 2019 work full time, with a further one-in-ten who work part time, 3% students, and 2% who are homemakers.
- One-quarter of visitors are retired (somewhat higher than the 18% in 2013), with a further 2% not currently working.