All Aboard?
The Public Case for High Speed Rail

Presentation by Frank Graves at the North American High Speed Rail Summit

Presentation of Survey Results

November 3, 2009

EKOS

Introduction & Methodology

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Introduction

- Little known about what the public thinks about high speed rail.

- Main objective of this research is to more fully understand public outlook on and support for bringing system of HSR to Canada.
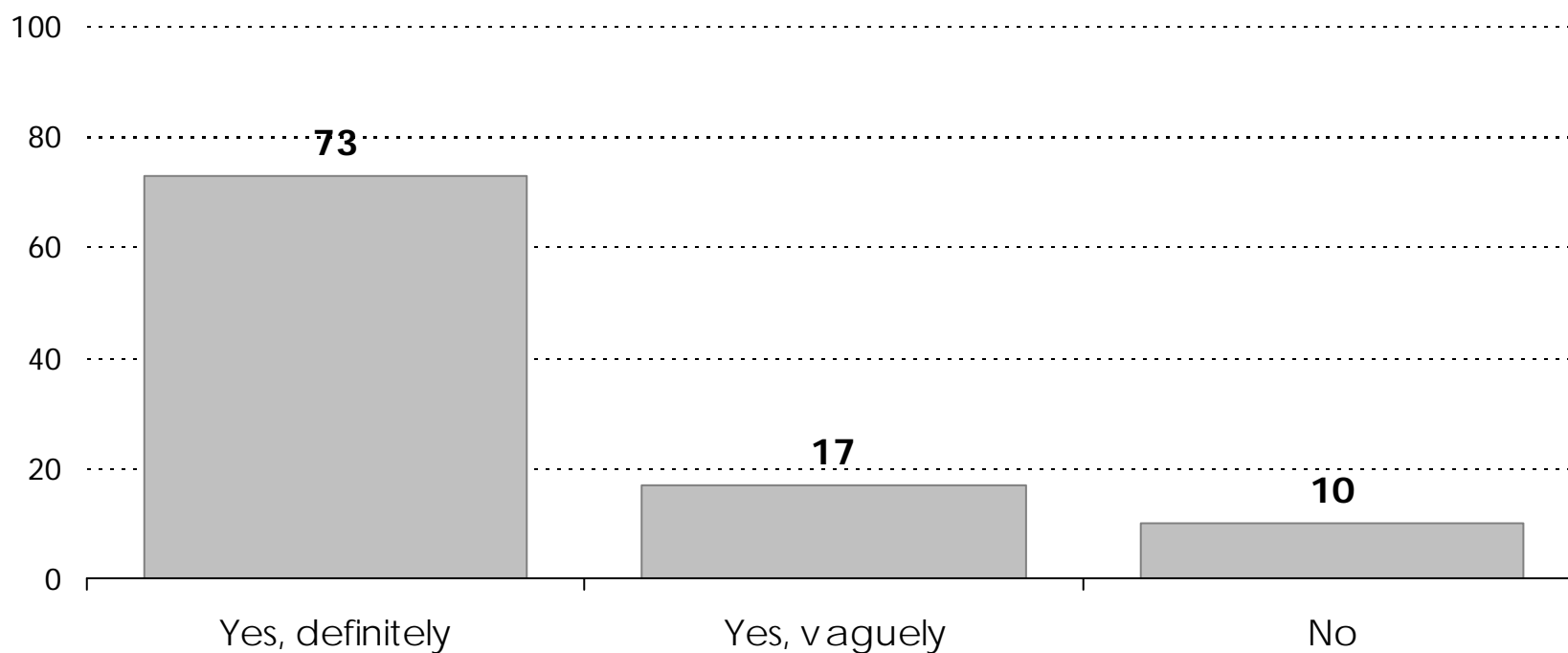
Methodology

- The High Speed Rail survey consisted of interviews with a representative sample of 1,647 Canadians (16 years of age and older).

- Surveying occurred between October 23-28, 2009.

- Surveys were collected using EKOS' hybrid telephone-online panel, Prob*it*. Unlike opt-in internet-only research panels, Prob*it* supports confidence intervals and error testing because all members are recruited by telephone using random digit dialing and are confirmed by live interviewers.

- Results from this survey may be considered statistically accurate to within +/- 2.4 percentage points, 19 times out of 20.

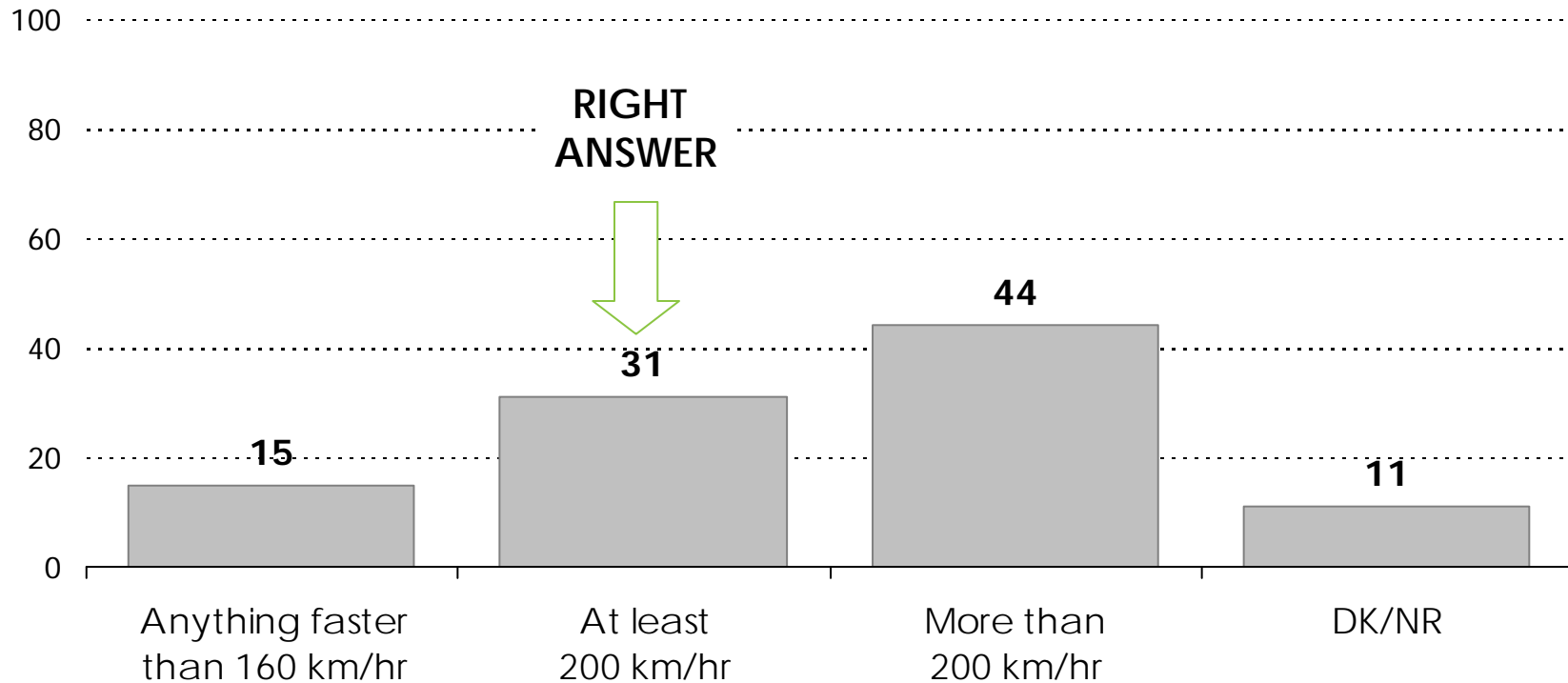# Awareness & Literacy

Familiarity with "high speed rail"

Q. *In the context of passenger rail travel, have you ever heard the term "high speed rail"?*
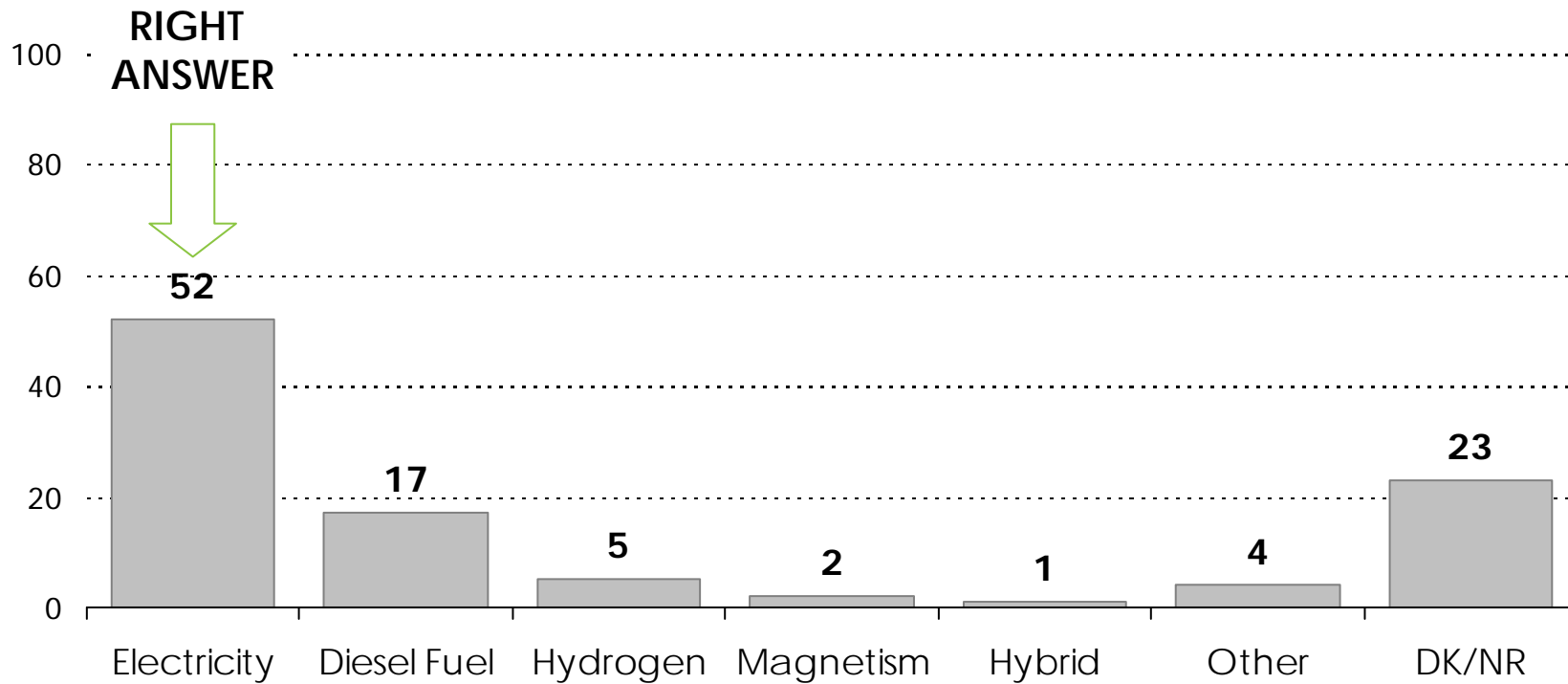
Literacy Test 1 – Speed of trains

Q. *In Canada, standard passenger trains currently travel up to speeds of approximately 160 km/hour. How fast do you think a train would have to travel in order to be considered "high speed"?*

RIGHT
ANSWER

Anything faster than 160 km/hr	At least 200 km/hr	More than 200 km/hr	DK/NR
15	31	44	11

Literacy Test 2 – Source of power

Q. How do think high speed trains are powered?

RIGHT
ANSWER

	Electricity	Diesel Fuel	Hydrogen	Magnetism	Hybrid	Other	DK/NR
Value	52	17	5	2	1	4	23

Base – Canadians; October 2009 n=1647

Literacy Index

100
80
60
44
40 36
20
20
0

"Low literacy"   "Moderate Literacy"   "High Literacy"

By group:

* No awareness
* Oppose HSR
* Residents of Prairies
  & Atlantic Canada
* Women, seniors, &
  lower SES
* Those outside corridor

* Vague awareness
* Support HSR
* Residents of Ontario
* Women

* Clear awareness
* Support HSR
* Residents of Alberta &
  B.C
* Men and higher SES
* Those inside corridor
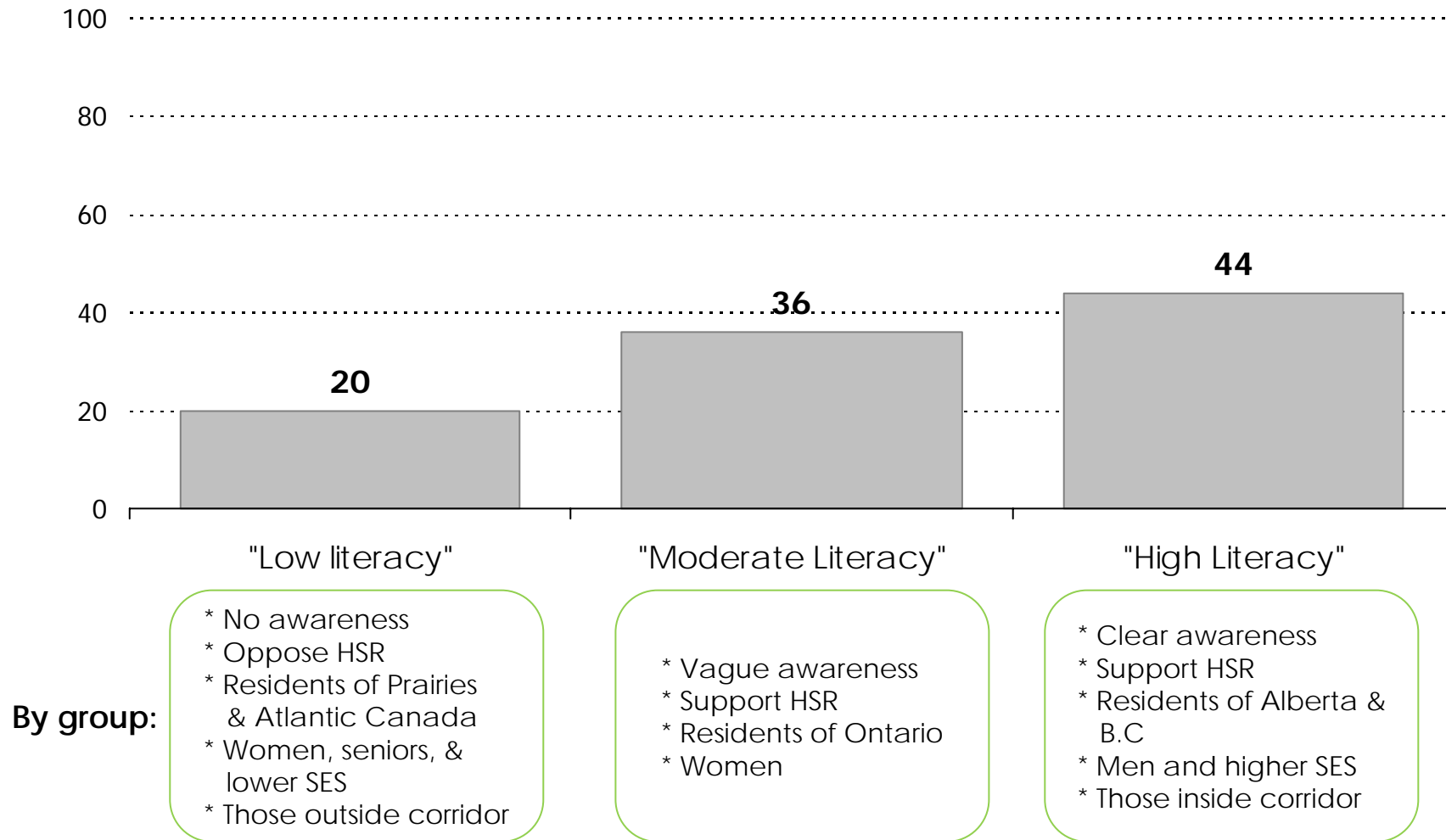
Base – Canadians; October 2009 n=1647

Arguments For & Against

Arguments *for* high speed rail

*Building a high-speed rail system would help to stimulate the Canadian economy by **creating thousands of new jobs**.*

9	10	81

*Because they operate on electricity, high-speed rail will **significantly reduce carbon emissions** in Canada.*

11	12	78

*High-speed rail will **strengthen the Canadian economy** in the future by enabling more people to travel more quickly throughout Canada.*
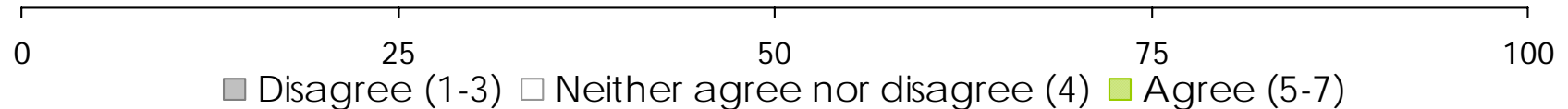
11	11	77

*High-speed rail will improve public safety by **reducing the amount of automobile traffic** on Canadian highways.*

16	14	71

*If Canada **doesn't invest in high-speed rail now, we will be left lagging behind** our major trading partners.*

19	19	61

*By linking different parts of the country, high-speed rail would **strengthen national unity** in Canada.*

23	24	53

0   25   50   75   100

■ Disagree (1-3)   □ Neither agree nor disagree (4)   ■ Agree (5-7)

Arguments *against* high speed rail

*High-speed rail will **only benefit those living in the most populated areas** in Canada.*

29	15	56

*I have **little confidence** that Canada will be able to*
*implement **high-speed rail in an efficient and timely manner**.*

38	20	42

*High-speed rail is going to cost a lot and I think there are **better uses for this money**.*

53	19	27

It is not worth introducing high-speed rail to Canada because
*it will **simply cost too much money**.*

65	17	18

0   25   50   75   100

■ Disagree (1-3) □ Neither agree nor disagree (4) ■ Agree (5-7)

Base – Canadians; October 2009 n=1647

Pro vs. Con Factors

	ARGUMENT	PRO FACTOR	CON FACTOR
#1 economic stimulus	HSR...helps to stimulate the economy	.785	
	HSR...will strengthen the Canadian economy	.768	
#2	Canada left lagging behind without HSR investment	.753	
#3	HSR...will improve public safety	.737	
#4	Better uses for money		.703
#5	HSR...will reduce carbon emissions	.701	
#6	Little confidence that Canada able to implement HSR		.693
#7	HSR...only benefit those in most populated areas		.690
#8	HSR...will strengthen national unity	.679	
#9	HSR...will simply cost too much		.669

Anatomy of Support
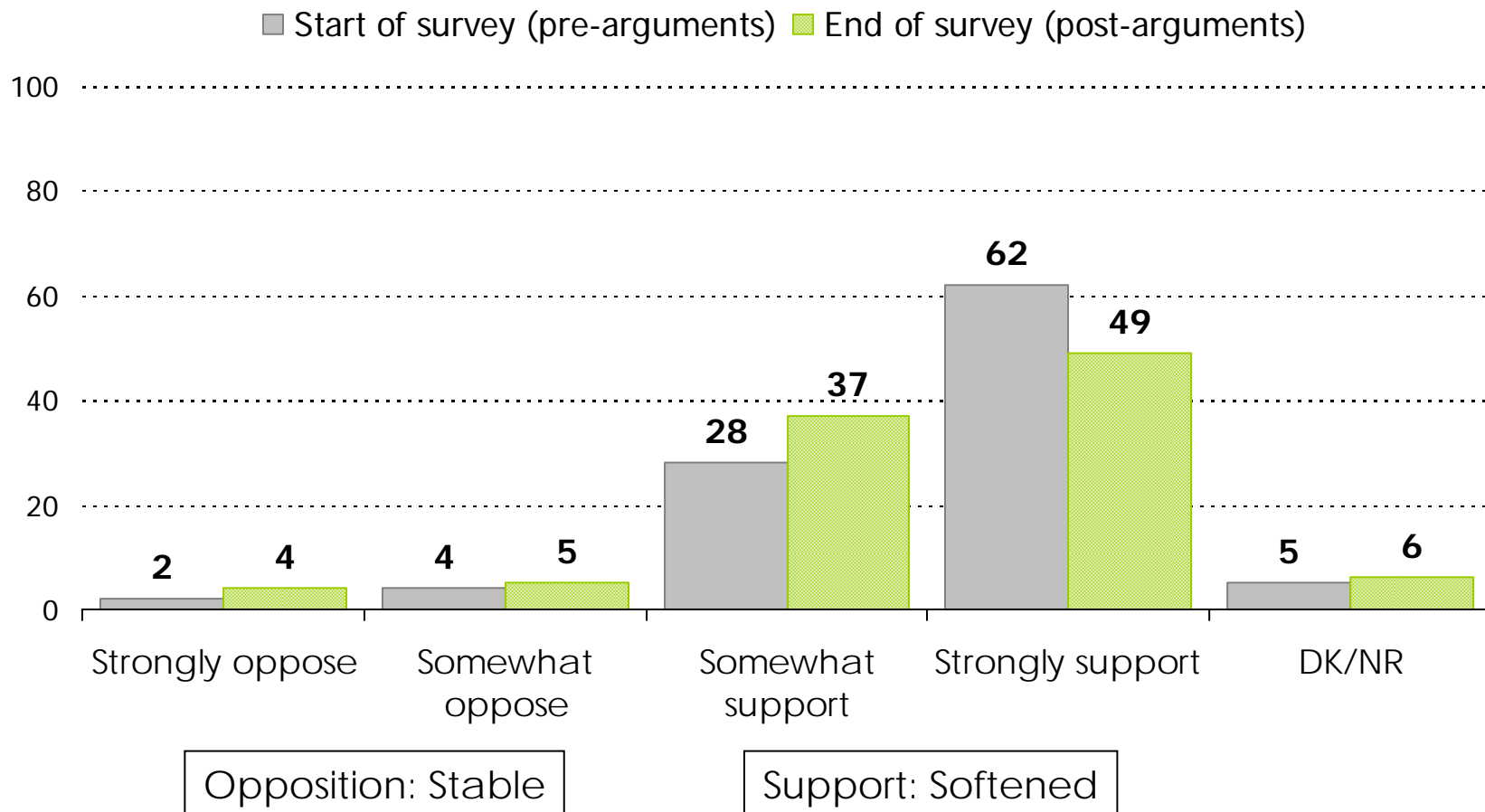
Support for high-speed rail (initial)
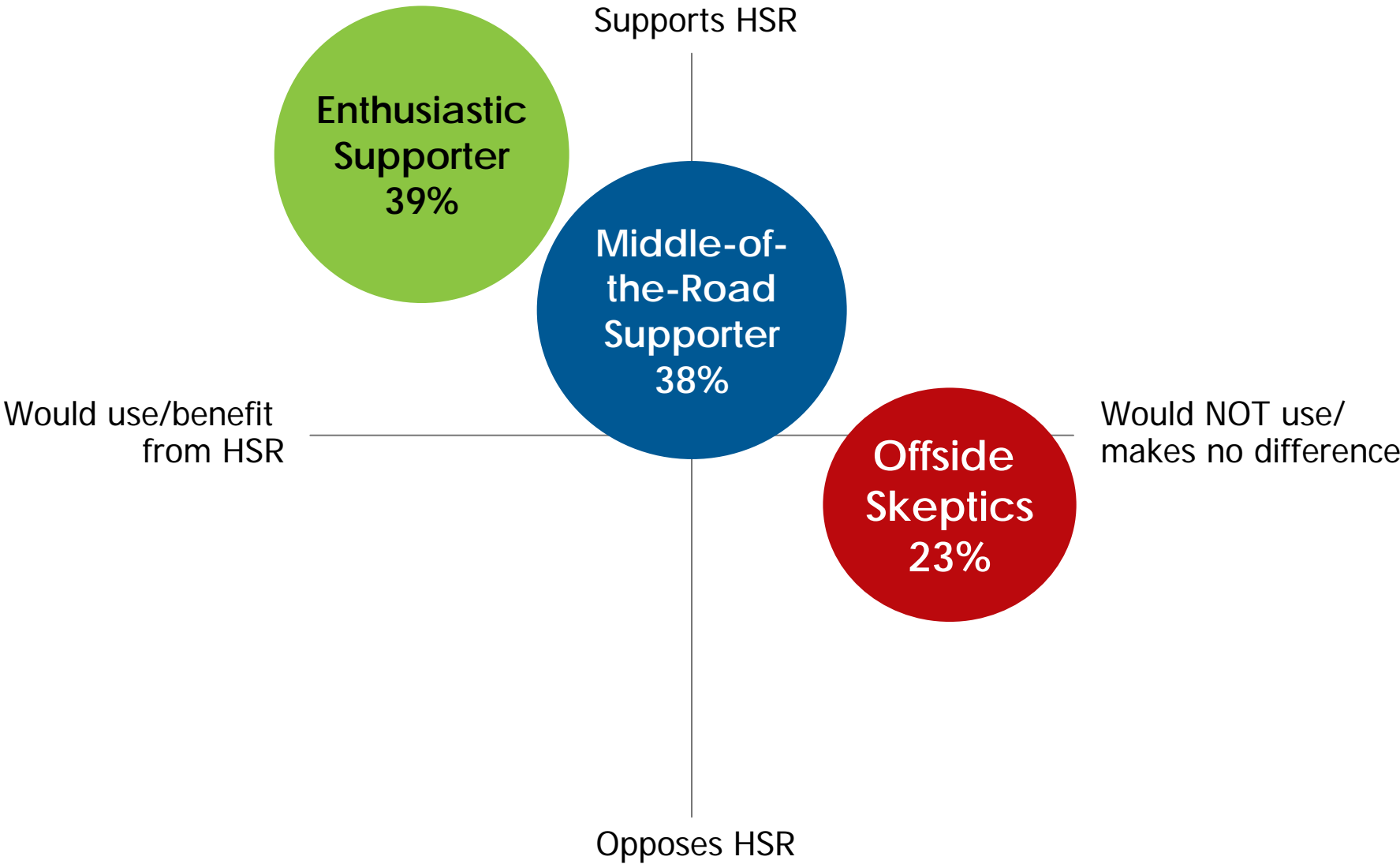
Q. *Do you oppose or support Canada introducing high speed rail?*
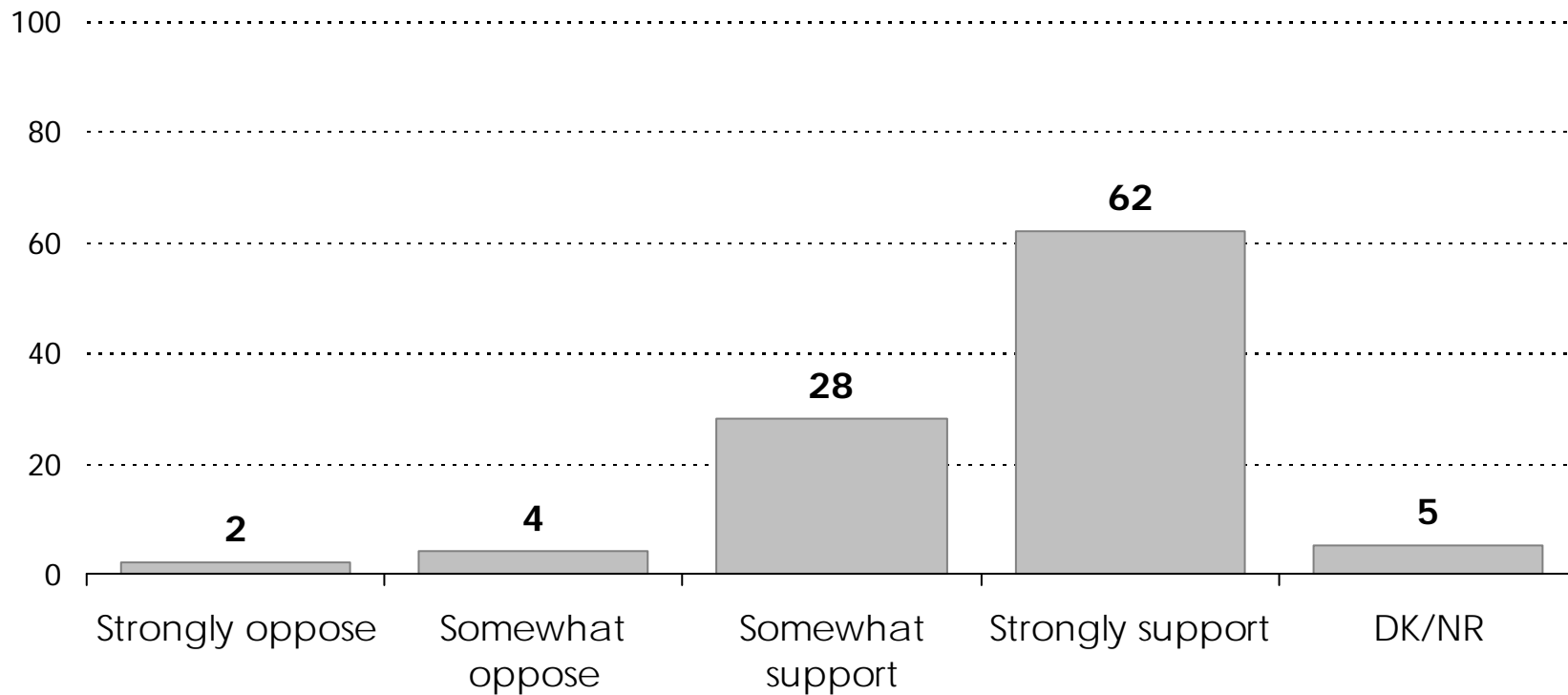
Support for high-speed rail (initial vs. end)

Q. Do you oppose or support Canada introducing high speed rail?

■ Start of survey (pre-arguments) ■ End of survey (post-arguments)

	Strongly oppose	Somewhat oppose	Somewhat support	Strongly support	DK/NR
Start of survey	2	4	28	62	5
End of survey	4	5	37	49	6

Opposition: Stable

Support: Softened

Anatomy of Support

Supports HSR

Enthusiastic Supporter 39%

Middle-of-the-Road Supporter 38%

Would use/benefit from HSR

Would NOT use/ makes no difference

Offside Skeptics 23%

Opposes HSR

Funding

Sources of funding
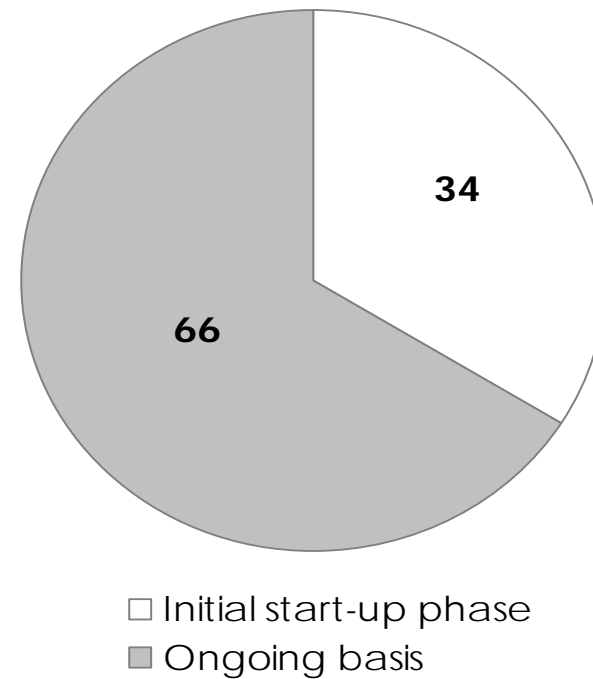
Government involvement in funding

Q. *Which level of government do you think should be involved in funding high speed rail?*
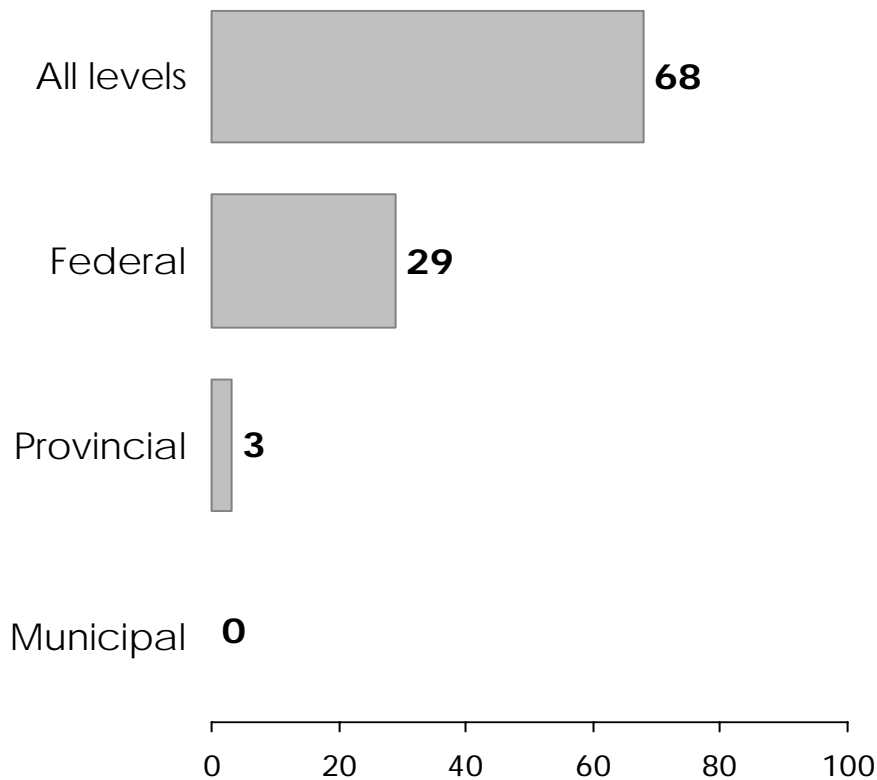
**Q.** *Do you think government should be involved in providing funding on an ongoing basis or just in the initial start-up phase?*

All levels **68**

Federal **29**

Provincial **3**

Municipal **0**

| 0 | 20 | 40 | 60 | 80 | 100 |

34

66

□ Initial start-up phase
■ Ongoing basis

Base – Those who say public sector funding; October 2009 n=1466

Perceived sustainability of high-speed rail

Q. *Once the system is in place, do you believe that high speed rail will be sustainable with revenues generated from passengers, or do you think the system will have to be subsidized?*
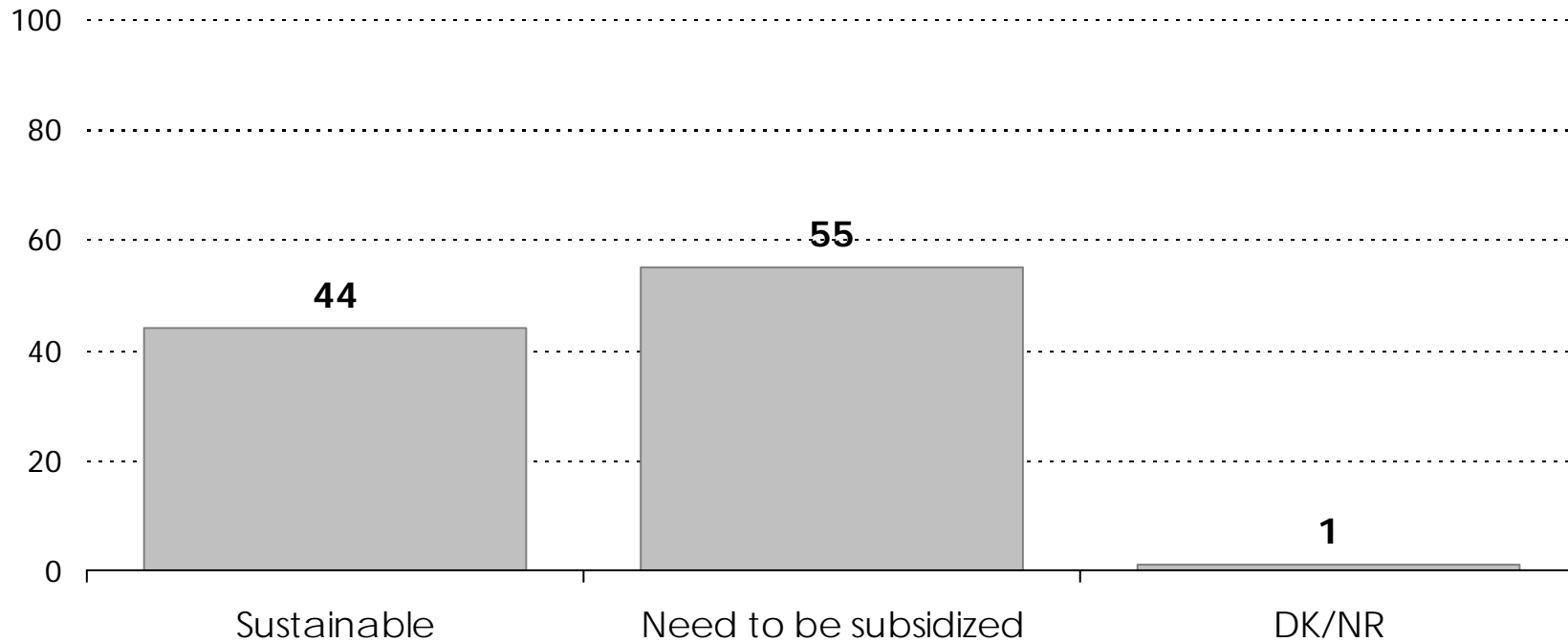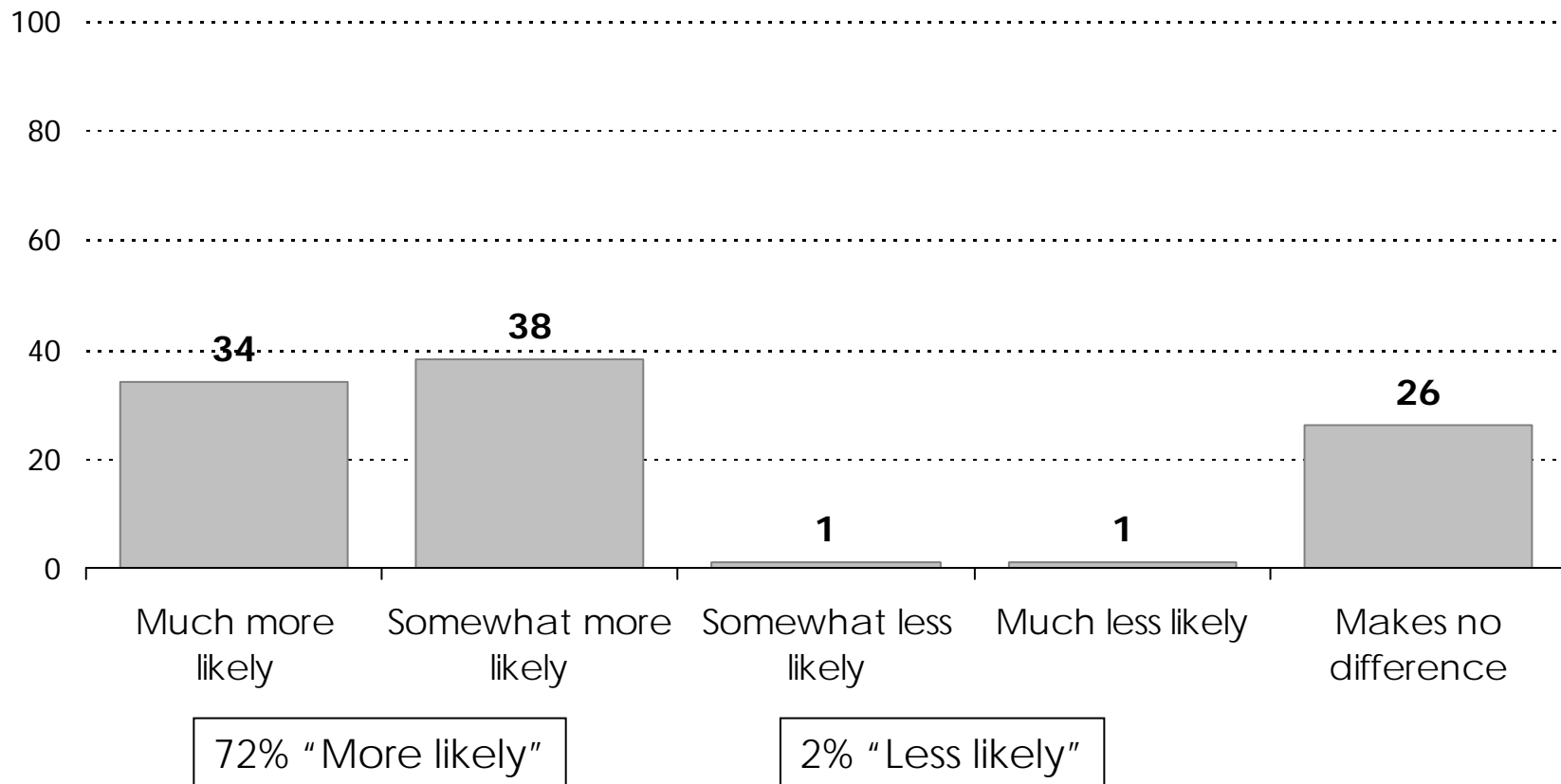

Base – Canadians; October 2009 n=1647

Use

Predicted use of high-speed rail

Q. *If Canada had a high speed rail system, would you be more or less likely to travel by train, or would it make no difference?*

72% "More likely"

2% "Less likely"

Conclusions

Conclusions (i)

- Very high levels of awareness of HSR, coupled with modest fluency

- Overwhelming top-of-mind support
  - Reflection weakens support
  - BUT drop focussed amongst tepid supporters (i.e., skeptics, opponents, and the "what's in it for me" segments of population)

- The public divides into 3 main segments:
  - Enthusiastic Supporters   39%
  - Middle-of-the-Road Supporters   38%
  - Offside Skeptics   23%
  - ⤷ Enthusiasts will be far more engaged and influential / opponents unlikely to be "in the street" over this debate

Conclusions (ii)

- Pro arguments are currently unidimensional and eclipse con arguments

  - Most powerful arguments are perceived immediate and long-term economic benefits, followed by benefit to the environment

- Con arguments rate much lower than pro arguments

  - Most powerful argument is "political economy" (vested interest has a pervasive impact), skepticism, then costs

- Realpolitik understanding of need for state intervention to make this happen (and probably to sustain)

  - Preference is for involvement of "all levels", but if forced to choose public looking to federal government

- Recommendation: All aboard – full speed ahead!

FOR MORE INFORMATION:

Frank Graves, President
EKOS Research Associates
p. 613.235.7215
e. fgraves@ekos.com