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
Introduction & Methodology
Introduction & Methodology

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, Probit. Unlike opt-in internet-only research panels, Probit 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
Q. In the context of passenger rail travel, have you ever heard the term “high speed rail”?

- Yes, definitely: 73
- Yes, vaguely: 17
- No: 10

Base: Canadians; October 2009 n=1647
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: 15
- At least 200 km/hr: 31
- More than 200 km/hr: 44
- DK/NR: 11

*Base - Canadians; October 2009 n=1647*
Q. How do you think high speed trains are powered?

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

Base - Canadians; October 2009 n=1647
By group:

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

- **"Moderate Literacy"**
  - Vague awareness
  - Support HSR
  - Residents of Ontario
  - Women

- **"High Literacy"**
  - 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.

- Agree (5-7): 81%
- Neither agree nor disagree (4): 11%
- Disagree (1-3): 10%

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

- Agree (5-7): 78%
- Neither agree nor disagree (4): 12%
- Disagree (1-3): 11%

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

- Agree (5-7): 77%
- Neither agree nor disagree (4): 11%
- Disagree (1-3): 16%

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

- Agree (5-7): 71%
- Neither agree nor disagree (4): 14%
- Disagree (1-3): 16%

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

- Agree (5-7): 61%
- Neither agree nor disagree (4): 19%
- Disagree (1-3): 19%

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

- Agree (5-7): 53%
- Neither agree nor disagree (4): 24%
- Disagree (1-3): 23%

Base – Canadians; October 2009 n=1647
Arguments against high speed rail

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

- Disagree (1-3): 29%
- Neither agree nor disagree (4): 15%
- Agree (5-7): 56%

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

- Disagree (1-3): 38%
- Neither agree nor disagree (4): 20%
- Agree (5-7): 42%

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

- Disagree (1-3): 53%
- Neither agree nor disagree (4): 19%
- Agree (5-7): 27%

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

- Disagree (1-3): 65%
- Neither agree nor disagree (4): 17%
- Agree (5-7): 18%
## Pro vs. Con Factors

<table>
<thead>
<tr>
<th>ARGUMENT</th>
<th>PRO FACTOR</th>
<th>CON FACTOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 economic stimulus</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HSR...helps to stimulate the economy</td>
<td>.785</td>
<td></td>
</tr>
<tr>
<td>HSR...will strengthen the Canadian economy</td>
<td>.768</td>
<td></td>
</tr>
<tr>
<td>#2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada left lagging behind without HSR investment</td>
<td>.753</td>
<td></td>
</tr>
<tr>
<td>#3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HSR...will improve public safety</td>
<td>.737</td>
<td></td>
</tr>
<tr>
<td>#4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Better uses for money</td>
<td></td>
<td>.703</td>
</tr>
<tr>
<td>#5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HSR...will reduce carbon emissions</td>
<td>.701</td>
<td></td>
</tr>
<tr>
<td>#6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Little confidence that Canada able to implement HSR</td>
<td></td>
<td>.693</td>
</tr>
<tr>
<td>#7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HSR...only benefit those in most populated areas</td>
<td></td>
<td>.690</td>
</tr>
<tr>
<td>#8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HSR...will strengthen national unity</td>
<td></td>
<td>.679</td>
</tr>
<tr>
<td>#9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HSR...will simply cost too much</td>
<td></td>
<td>.669</td>
</tr>
</tbody>
</table>
Anatomy of Support
Support for high-speed rail (initial)

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

Base – Canadians; October 2009 n=1647
Q. Do you oppose or support Canada introducing high speed rail?

<table>
<thead>
<tr>
<th>Strongly oppose</th>
<th>Somewhat oppose</th>
<th>Somewhat support</th>
<th>Strongly support</th>
<th>DK/NR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>4</td>
<td>28</td>
<td>62</td>
<td>5</td>
</tr>
<tr>
<td>4</td>
<td>5</td>
<td>37</td>
<td></td>
<td>6</td>
</tr>
</tbody>
</table>

Opposition: Stable
Support: Softened

Base - Canadians; October 2009 n=1647
Anatomy of Support

- **Enthusiastic Supporter**: 39% Supports HSR, Would use/benefit from HSR
- **Middle-of-the-Road Supporter**: 38% Supports HSR, Would not use/makes no difference
- **Offside Skeptics**: 23% Opposes HSR, Would NOT use/makes no difference
Funding
Q. It is estimated that it will cost billions of dollars to introduce high speed rail to Canada. Who do you think should be primarily responsible for covering these costs?
Q. Which level of government do you think should be involved in funding high speed rail?

- All levels: 68
- Federal: 29
- Provincial: 3
- Municipal: 0

Q. Do you think government should be involved in providing funding on an ongoing basis or just in the initial start-up phase?

- Ongoing basis: 66
- Initial start-up phase: 34

Base - Those who say public sector funding; October 2009 n=1466
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?
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”

Base – Canadians; October 2009 n=1647
Conclusions
Conclusions (i)

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

• Overwhelming top-of-mind support
  – Reflection weakens support
  – BUT drop focused 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