



YOURS TO CELEBRATE

**CBC News
'The Big Fix' Survey**

**Toronto, Montreal Vancouver
Canada (OMNI Can)**

November 17, 2011

Leger
MARKETING

Marketing Intelligence



- Leger Marketing is the leading Canadian-owned market research and polling firm with more than 600 professionals working from its Canadian and American offices.
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Contact Information

For more information about this project, please contact:

Dimitra Maniatis

Associate Vice President

dmaniatis@legermarketing.com

Derek Christie

Account Manager

dchristie@legermarketing.com

(416) 815 0330



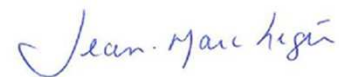
Canada

Toronto
Edmonton
Calgary
Ottawa
Montreal
Quebec City

USA

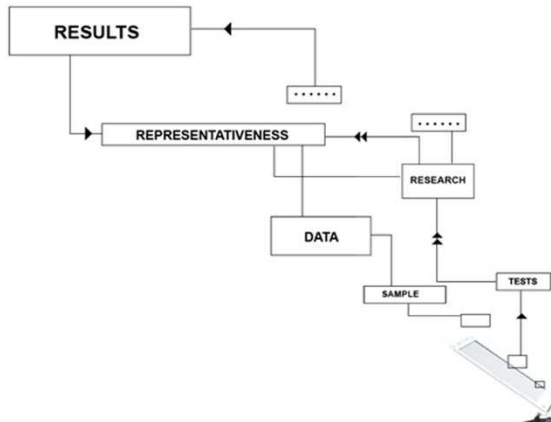
Philadelphia, PA
Tampa, FL
Denver, CO

We are proud to present you with this research report, which was produced under the stringent quality standards of our company and those of the Marketing Research and Intelligence Association (MRIA). We are confident that this report will address your concerns and we hope to have the privilege of serving you again in the near future.

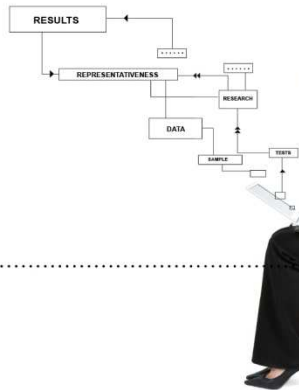


Jean-Marc Léger
President

**The largest
Canadian-owned
marketing research
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RESEARCH METHODS



RESEARCH METHODS

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INSTRUMENT

The CMA survey was completed on-line from November 11th to 15th, 2011 using Leger Marketing's online panel, **LegerWeb**, with a sample of 1503 residents of Toronto (n=502), Montreal (n=501) and Vancouver (n=500) CMAs, 18 years of age or older, who completed the survey in English or French.

A probability sample of the same size for the CMA phase of this study (n=1503) would yield a margin of error of 2.8%, 19 times out of 20, while a probability sample for the national phase (n=1500) would yield a margin of error of 2.5%, 19 times out of 20.

The national OMNICan survey was completed online from November 14th to 16th, 2011, using Leger Marketing's online panel, **LegerWeb**, with a sample of 1503 Canadian residents, 18 years of age or older, who completed the survey in English or French (Montreal CMA).

ONLINE PANEL

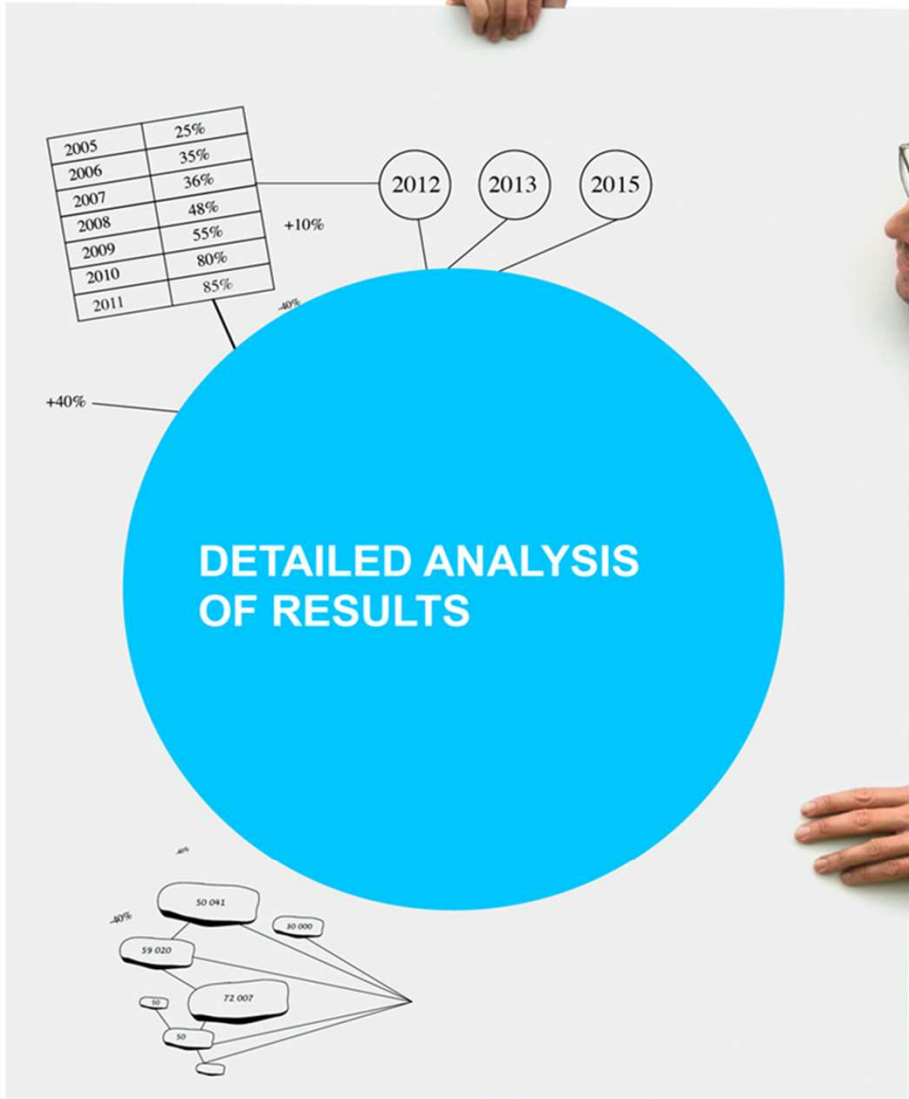
Leger Marketing's online panel has approximately 360,000 members nationally – with between 10,000 and 20,000 new members added each month, and has a retention rate of 90%.

Panel members are randomly selected to receive email invitations to the individual surveys.

We ensure the protection of privacy via the usage of unique URLs and respondent IDs in combination with survey IDs.

QUALITY CONTROL

Stringent quality assurance measures allow Leger Marketing to achieve the high-quality standards set by the company. As a result, its methods of data collection and storage outperform the norms set by WAPOR (The World Association for Public Opinion Research). These measures are applied at every stage of the project: from data collection to processing, through to analysis. We aim to answer our clients' needs with honesty, total confidentiality, and integrity.



Commuting



DETAILED ANALYSIS OF RESULTS

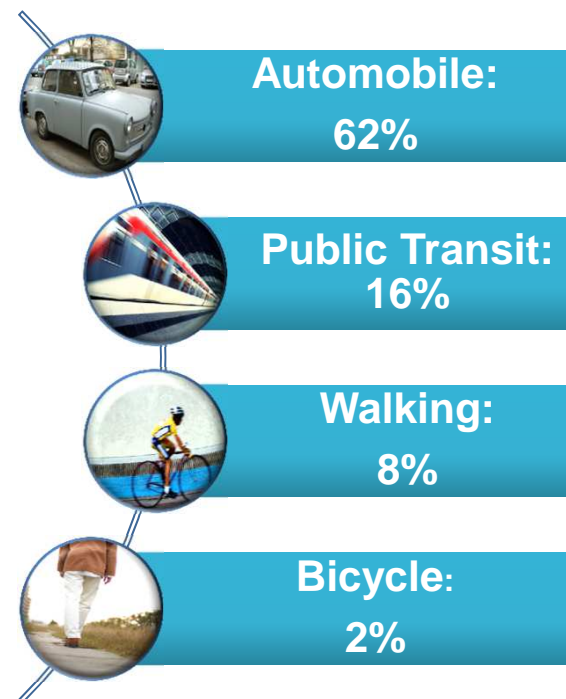
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PREFERRED MODE OF TRANSPORTATION

Automobile is preferred, followed by public transit.

Nationally, the preferred mode of transportation is the automobile. This trend is also evident within the three major urban hubs in Canada. That said, Vancouverites are more likely than residents of Montreal to prefer to travel in their cars, while Torontonians are more likely to choose public transit than are those living in the west coast metropolis.

National Preferred Mode of Transport



	Total-CMAs	Region		
		Vancouver	Toronto	Montreal
Automobile	56%	64%	53%	51%
Public Transit	33%	25%	37%	35%
Walking	8%	7%	7%	8%
Bicycle	4%	3%	2%	5%
Other	1%	1%	1%	1%

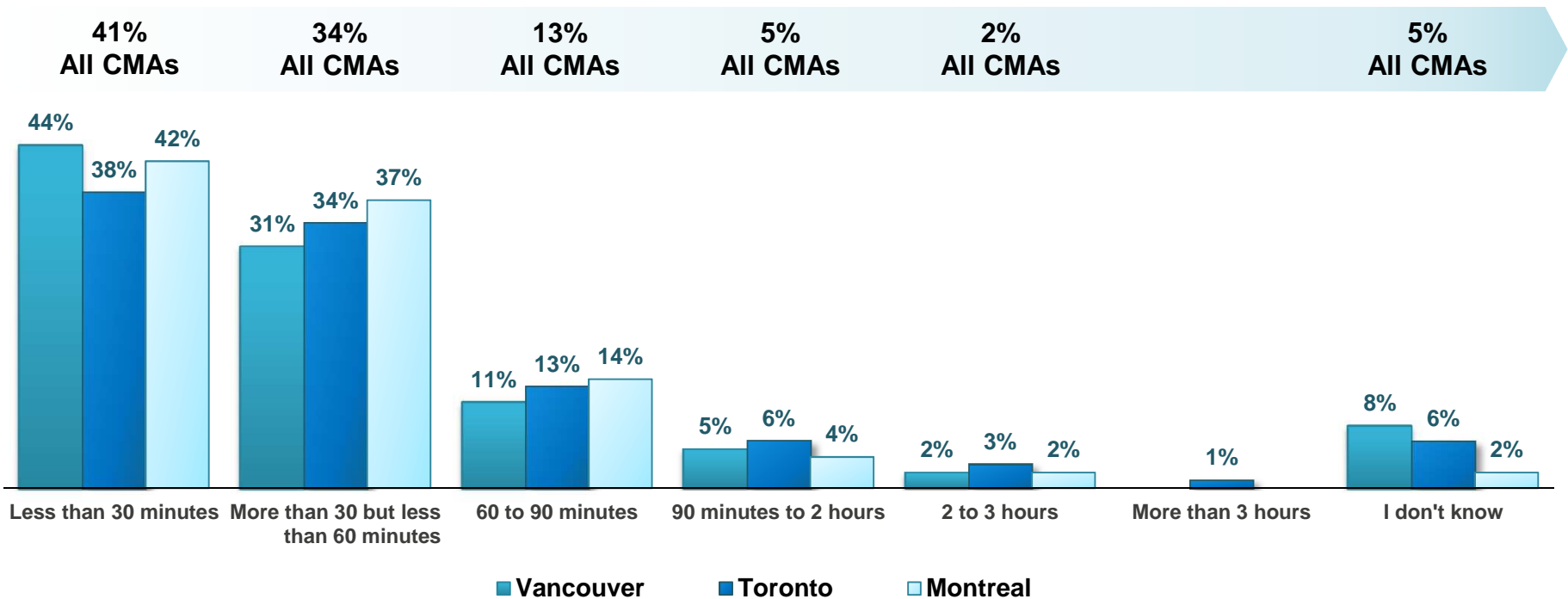


DETAILED ANALYSIS OF RESULTS

TIME SPENT COMMUTING

The majority spend less than sixty minutes commuting.

Across all CMAs included in this study, the majority of commuters spend an hour or less in transit. That said, one in ten commuters will spend between an hour and an hour and a half.





DETAILED ANALYSIS OF RESULTS

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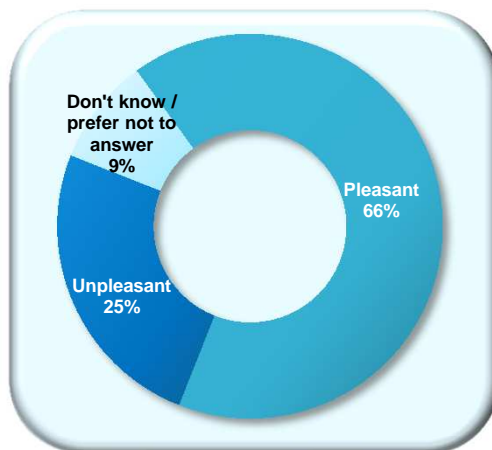
QUALITY OF THE COMMUTE

Commutes are generally perceived to be pleasant, however there are notable regional discrepancies.

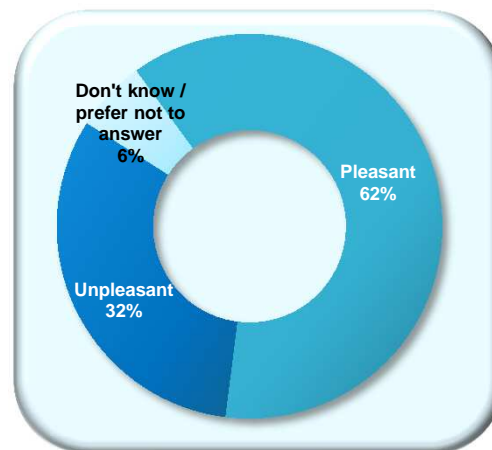
Although the majority in all three CMAs suggest that their commute is relatively pleasant, residents of Montreal are far more likely to hold this sentiment than Torontonians or Vancouverites. Conversely, Torontonians are among the most likely to indicate that their commute is an unpleasant experience, particularly when compared to residents of Montreal. Taken together, seven in ten commuters state that they have a pleasant commute, however this average is driven up considerably by Montreal's results.



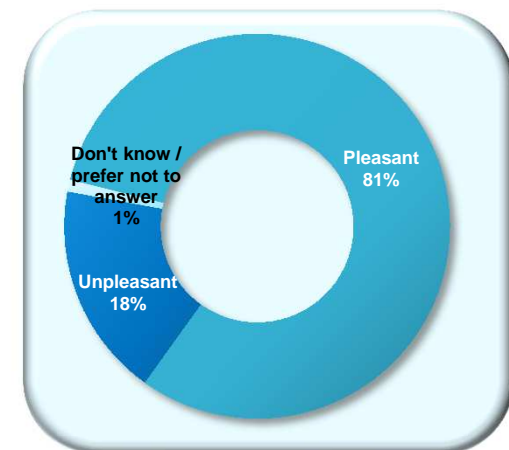
Vancouver



Toronto



Montreal





DETAILED ANALYSIS OF RESULTS

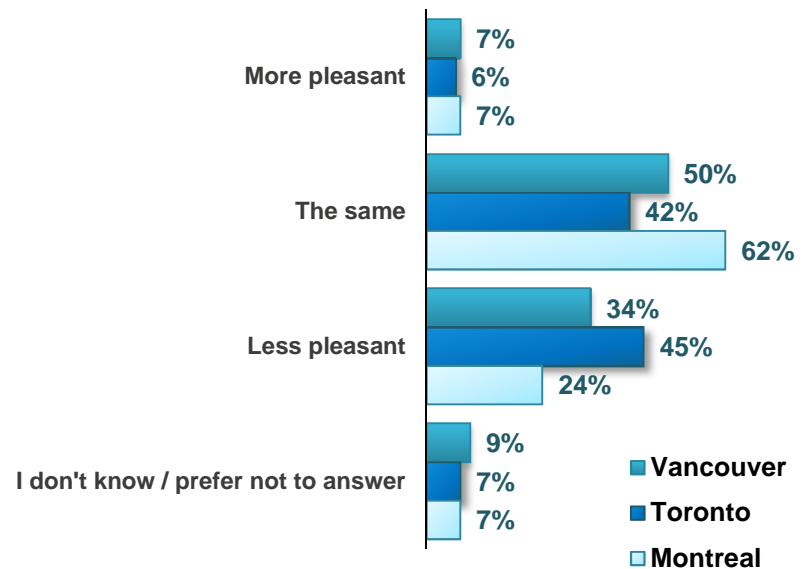
FUTURE OF THE COMMUTE

Optimism is not high among commuters.

There is little optimism about future commuting across the three CMAs. Fewer than one in ten believe their commute will become more pleasant, and in Toronto nearly half believe that the quality of their commute will deteriorate further in the future. Residents of Montreal remain among the most optimistic commuters, with the highest proportion indicating that they believe the quality of their commute will at least remain the same.



Across all CMAs, only 7% believe their commute will get more pleasant, while 34% suspect it will get worse





DETAILED ANALYSIS OF RESULTS

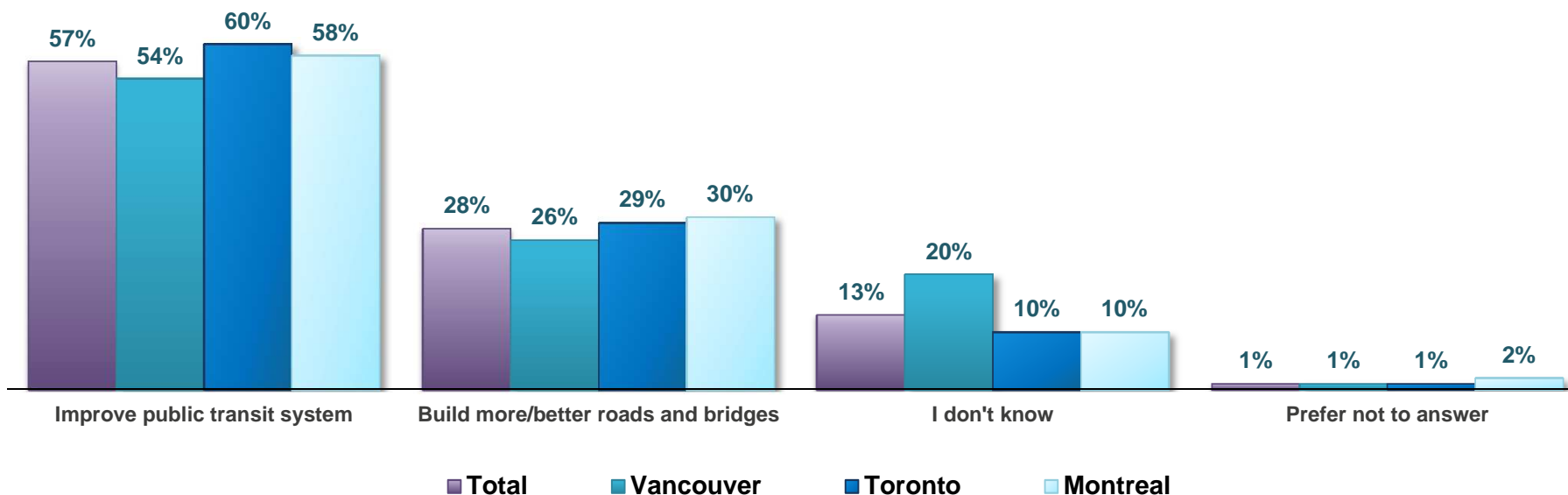
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REDUCING THE COMMUTE

The majority believe improved public transit will reduce the time spent commuting.

Improving public transit stands as the most commonly cited solution to slow commuting times. A smaller proportion of people from each CMA say that improving roads and bridges will alleviate some of the burden on commuters, while a relatively high proportion state that they do not know the best way to reduce the time spent on the daily commute. This is particularly common in Vancouver.

What will help reduce the time spent on the daily commute?



Changing Habits



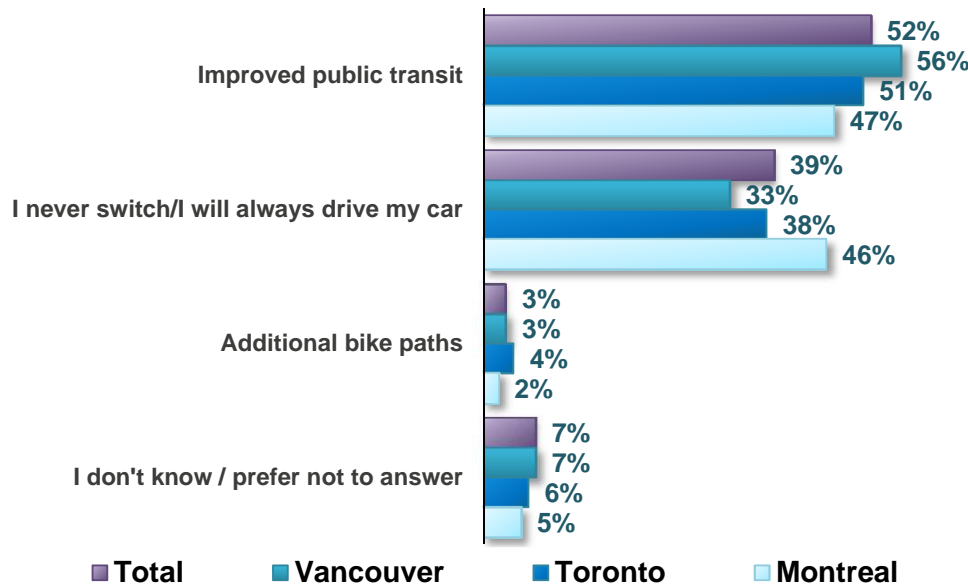
DETAILED ANALYSIS OF RESULTS

WILLINGNESS TO TAKE PUBLIC TRANSIT

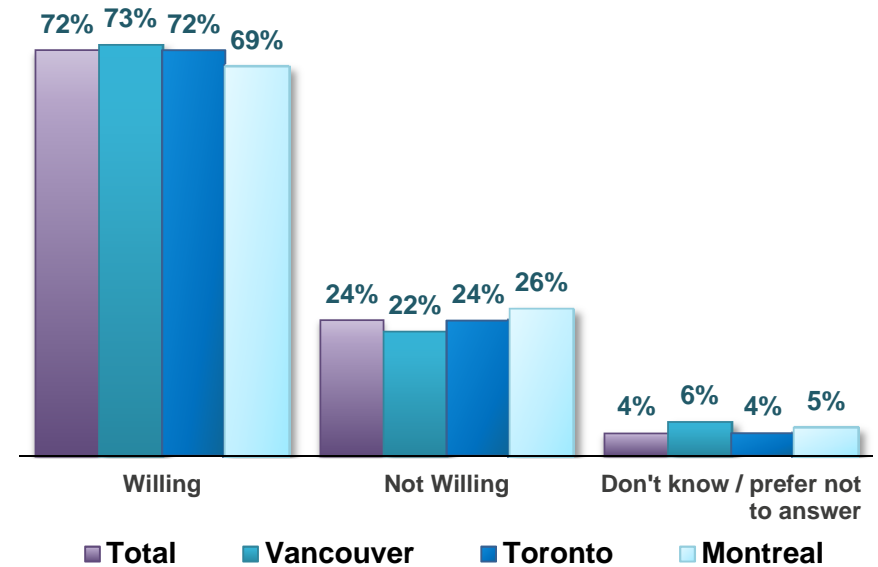
Most are willing to take public transit if it reduces commute time.

Improving public transit would be the most effective way of convincing commuters from each CMA to abandon their vehicles and adopt a new mode of transit. There are, however, a substantial proportion from each city that say that they will never choose another mode of transit. This is particularly common in Montreal. In what initially seems to be a contradiction to this finding, the majority surveyed say that they are willing to switch to public transit, however they stipulate that they would only if it saved time on the commute. Improving public transit's speed and efficiency is therefore a high priority for reducing car traffic.

What would it take to make you switch from driving?



How willing would you be to switch to public transit?



Q8. What would be required in order for you to switch from driving to and from work to another means of transportation? Base: Those who drive (n=849)

Q9. How willing would you be to switch to public transit if it saved you time? Base: Those who drive (n=849)

Improving Infrastructure



DETAILED ANALYSIS OF RESULTS

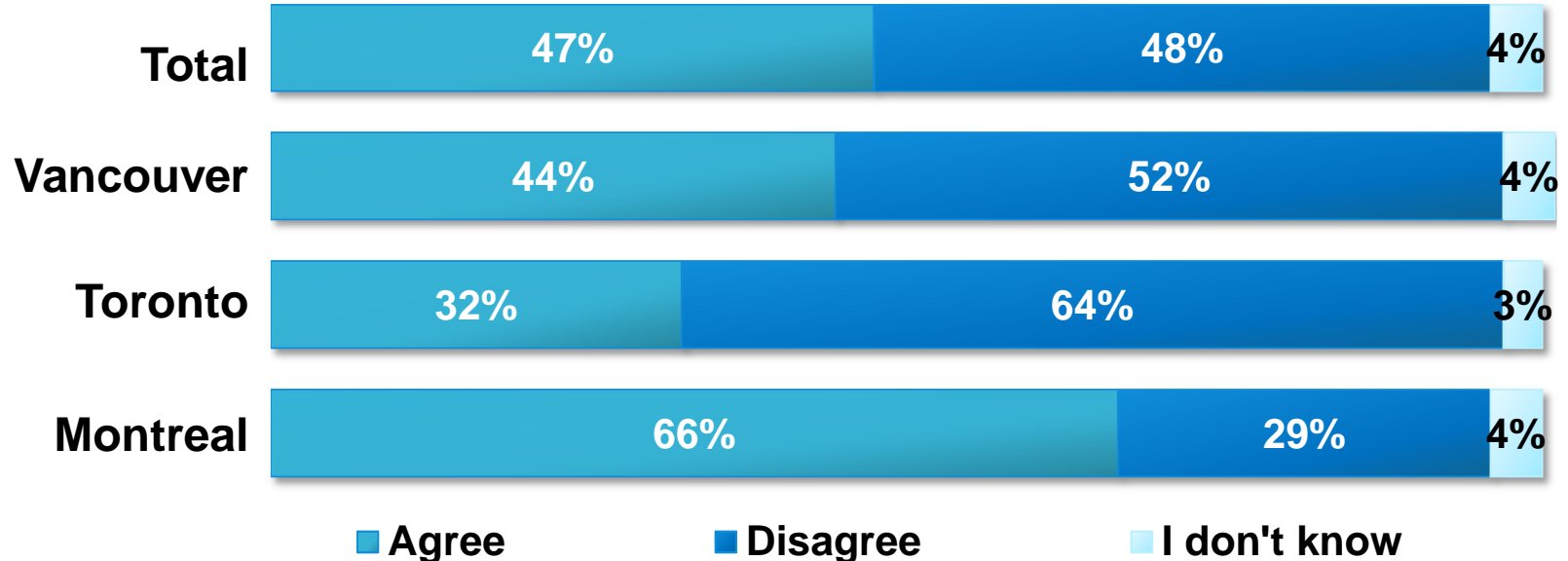
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ATTITUDES AND OPINIONS

Polarized opinions across the CMAs.

Opinions about public transit vary between the three CMAs, with residents of Montreal standing out in their approval of their transit system. Torontonians, on the other hand, have a comparatively dim view of their own transit system, where the majority *disagree* that their transit system is robust and in good shape.

“My city’s public transit system is in good shape”



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Q5. Please tell us how much you agree or disagree with the following statements?
NET: AGREE STRONGLY/SOMEWHAT vs. DISAGREE STRONGLY/SOMEWHAT. Base: All CMA commuters (n=1503)



DETAILED ANALYSIS OF RESULTS

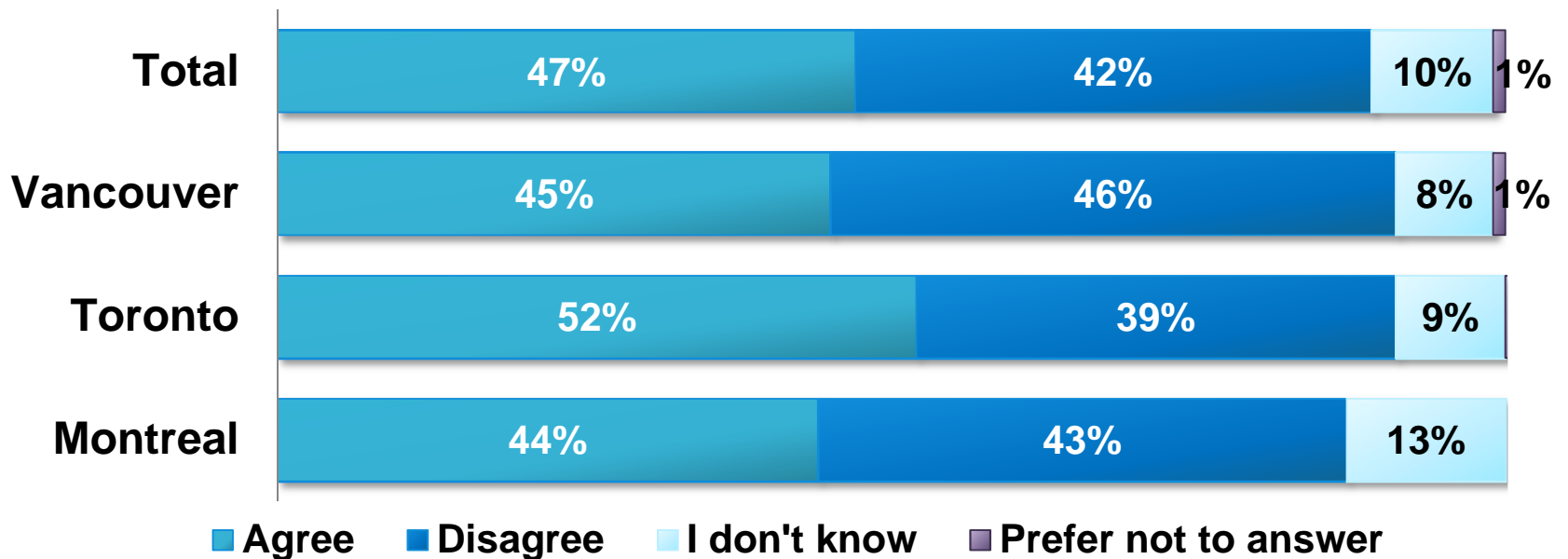
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ATTITUDES AND OPINIONS

Opinions divided on transit capacity.

Opinions concerning the capacity of the public transit systems in each major urban area are relatively consistent. Predictably, Torontonians are the most likely to agree that their system is taxed and cannot handle any more riders. Taking into account all three CMAs, opinions remain divided on the issue of transit system capacity.

“My city’s public transit system cannot handle any more riders”





DETAILED ANALYSIS OF RESULTS

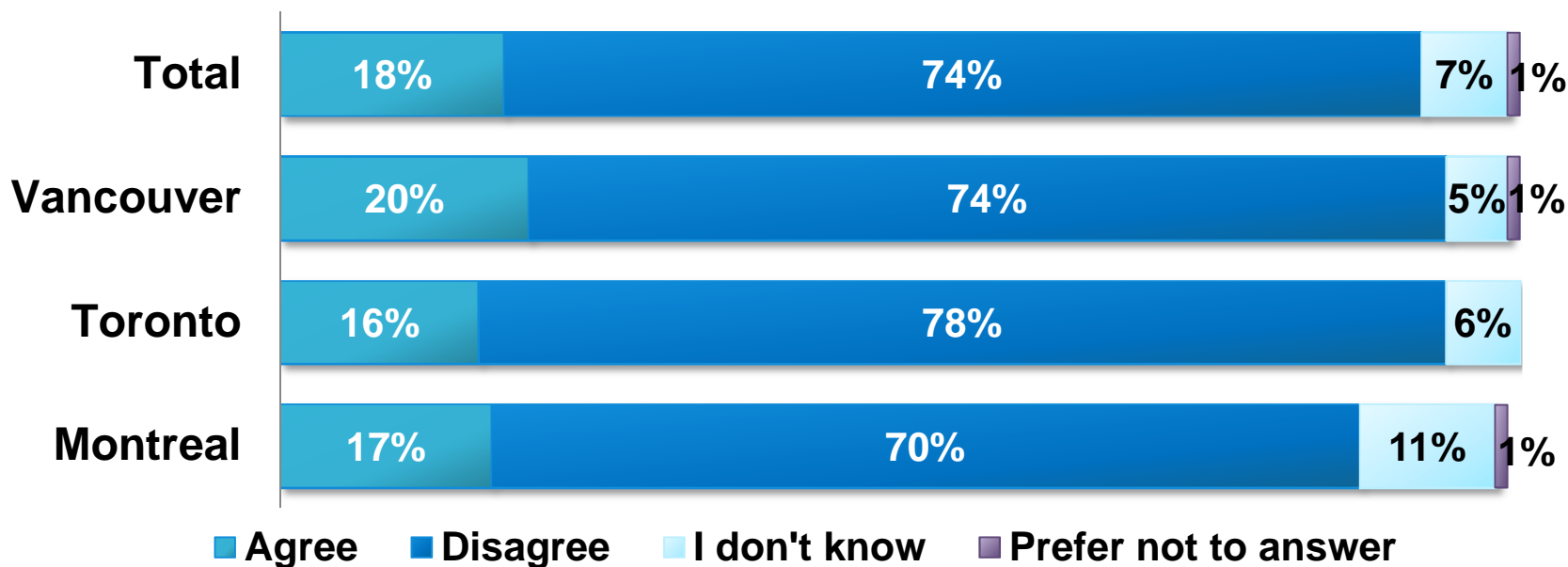
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ATTITUDES AND OPINIONS

Few believe their roads could handle more cars.

The majority of commuters in each of the major CMAs agree that the road system that links the city together is currently operating at near-maximum capacity. Torontonians rank the highest in suggesting that their streets cannot handle any more cars.

“The roads on my commute could handle significantly more cars that they do now”



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Q5. Please tell us how much you agree or disagree with the following statements?
NET: AGREE STRONGLY/SOMEWHAT vs. DISAGREE STRONGLY/SOMEWHAT. Base: All CMA commuters (n=1503)



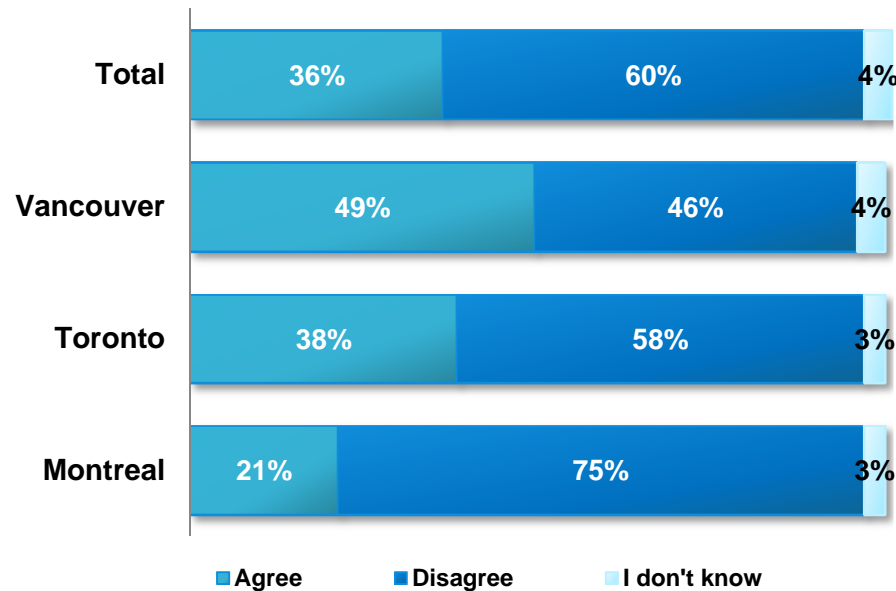
DETAILED ANALYSIS OF RESULTS

ATTITUDES AND OPINIONS

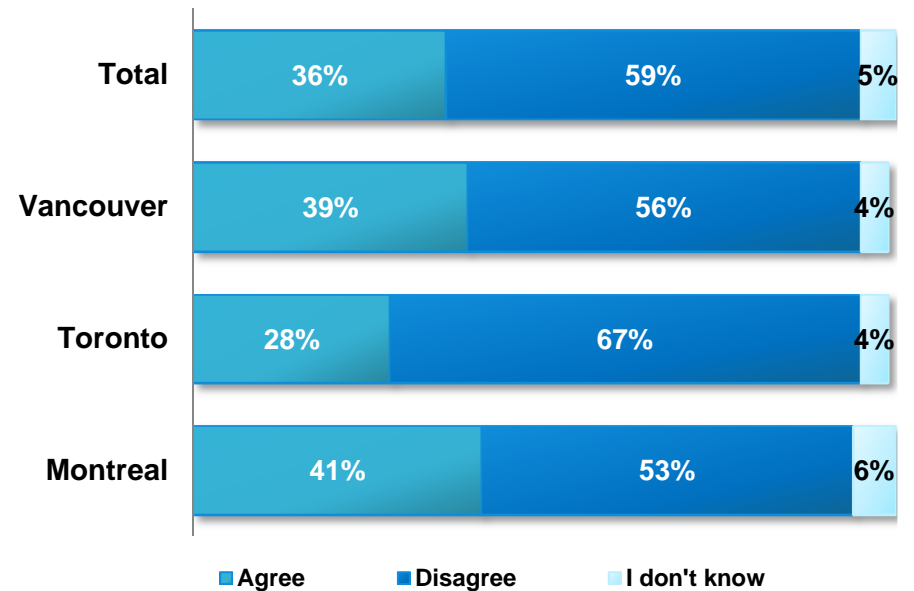
Attitudes vary greatly regarding transit and road maintenance.

Opinions fluctuate substantially between each CMA on the issue of transit and road maintenance. In Vancouver, commuters believe that their government has managed to effectively maintain the road system, particularly when compared to Montreal, where commuter opinion is not nearly so favourable. Torontonians hold a particularly low opinion of their government's efforts to maintain their public transit system, while residents of Montreal hold a significantly more favourable view of theirs.

“My local government is doing a good job keeping up with road maintenance and development”



“My local government is doing a good job keeping up with public transit maintenance and development”





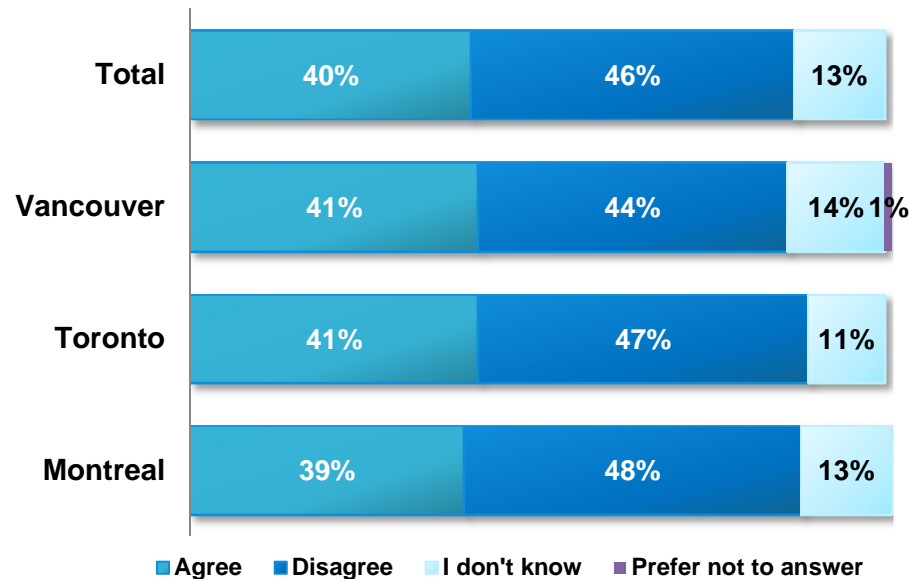
DETAILED ANALYSIS OF RESULTS

ATTITUDES AND OPINIONS

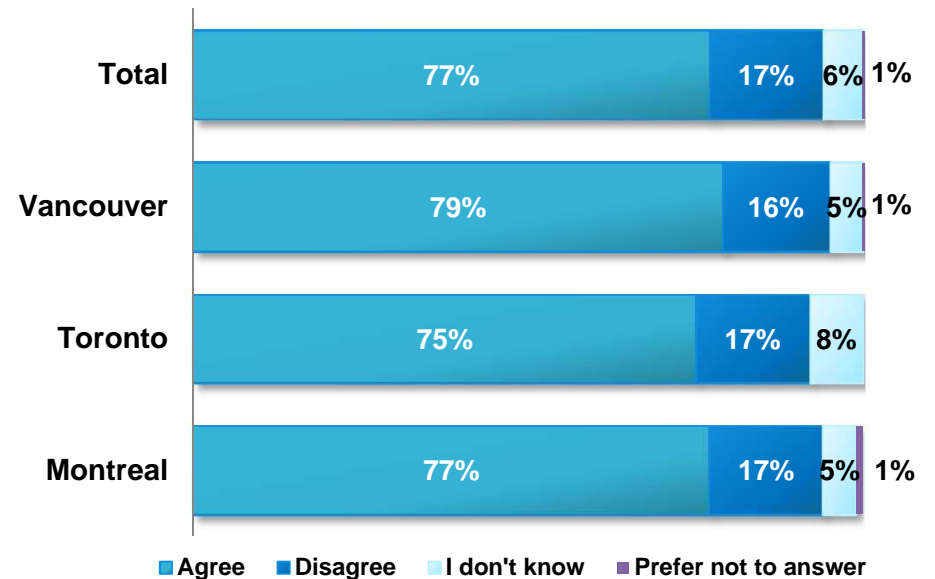
A marked difference exists between perceptions of taxation and perceptions of available government funds.

Opinions regarding taxation and the capacity of governments to pay for infrastructure improvements are relatively homogenous across the three CMAs. That said, the findings here are contradictory. Commuters are generally certain that they pay enough taxes to fund infrastructure renewal projects, however a much smaller proportion believe that their governments possess the fiscal fortitude to embark on these projects.

“My local government has enough money to pay for road and public transit improvements”



“I pay enough taxes to cover the cost of maintaining roadway infrastructure and building new roads / bridges as needed”





DETAILED ANALYSIS OF RESULTS

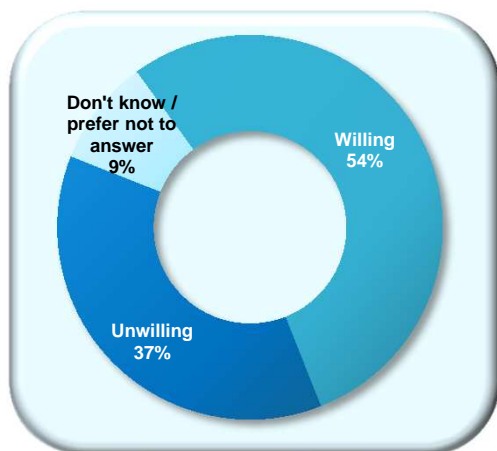
WILLINGNESS TO PAY FOR BETTER PUBLIC TRANSIT

There is a relatively high willingness to pay more for better service among transit users.

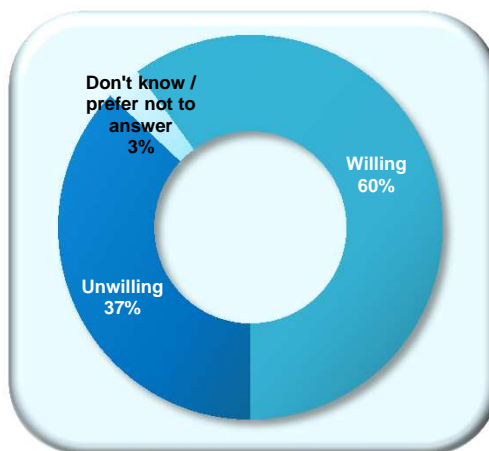
Roughly half or more of transit users in each CMA indicate a willingness to pay more for better public transit. Toronto transit users exhibit a particularly strong willingness to contribute more for better service.



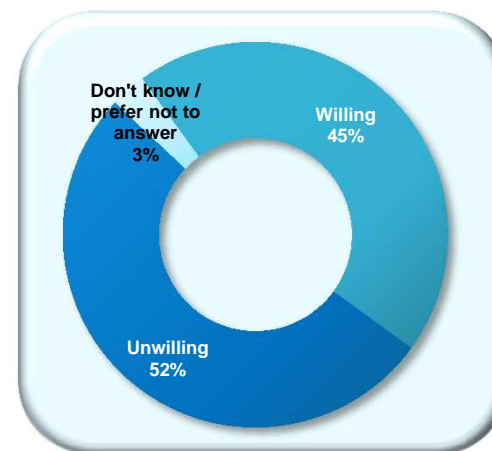
Vancouver



Toronto



Montreal





DETAILED ANALYSIS OF RESULTS

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FUNDING IMPROVEMENTS TO INFRASTRUCTURE (NATIONAL)

Women are more in favour of these measures than men.

Nationally, the highest proportion of Canadians believe that municipalities should receive a higher proportion of income tax to help update roads, bridges, and public transit. Road tolls are viewed as a viable option to pay for road improvements by one in three Canadians. In each case, women are more likely than men to support the measures listed below, while men are more likely to say that they do not know what should be used to pay for improvements.

Which of the following do you think should be used to pay for roads / bridges?

To pay for roads/bridges	National
Municipalities receive a higher share of income tax	41%
Road tolls	34%
A congestion charge	22%
Increase fuel tax at the pump	11%
Higher transit user rates	8%
Increased sales tax	6%
I don't know	16%
Prefer not to answer	3%

Which of the following should be used to pay for public transit improvements?

To pay for public transit	National
Municipalities receive a higher share of income tax	34%
A congestion charge	24%
Road tolls	21%
Higher transit user rates	19%
Increase fuel tax at the pump	10%
Increased sales tax	4%
I don't know	21%
Prefer not to answer	4%



DETAILED ANALYSIS OF RESULTS

FUNDING IMPROVEMENTS TO INFRASTRUCTURE

Road tolls and congestion charges are popular solutions.

Mirroring the results from the national sample, the commuters in the three CMAs agree that municipalities ought to receive a higher share of income tax to fund infrastructural improvement projects. Road tolls and congestion charges are also popular solutions to funding problems. Residents of Montreal are particularly supportive of road tolls when compared to the commuters in the other two CMAs.

Which of the following do you think should be used to pay for roads / bridges?

Which of the following should be used to pay for public transit improvements?

To pay for roads/bridges	Total	Region		
		Vancouver	Toronto	Montreal
Municipalities receive a higher share of income tax	40%	46%	50%	24%
Road tolls	38%	26%	31%	56%
Congestion Charge	30%	29%	30%	31%
Increase fuel tax at the pump	16%	18%	20%	11%
Higher transit user rates	7%	10%	8%	4%
Increased sales tax	5%	6%	6%	3%
I don't know	13%	15%	13%	10%
Prefer not to answer	3%	3%	1%	4%

To pay for public transit	Total	Region		
		Vancouver	Toronto	Montreal
Municipalities receive a higher share of income tax	45%	49%	54%	31%
A congestion charge	34%	31%	36%	34%
Road tolls	29%	19%	25%	43%
Higher transit user rates	15%	20%	15%	9%
Increase fuel tax at the pump	15%	15%	14%	16%
Increased sales tax	5%	7%	6%	2%
I don't know	13%	15%	14%	9%
Prefer not to answer	3%	3%	1%	4%



Q10. Which of the following do you think should be used to pay for improvements to roads / bridges? Base: All CMA commuters (n=1503)

Q10. Which of the following do you think should be used to pay for improvements to public transit? Base: All CMA commuters (n=1503)



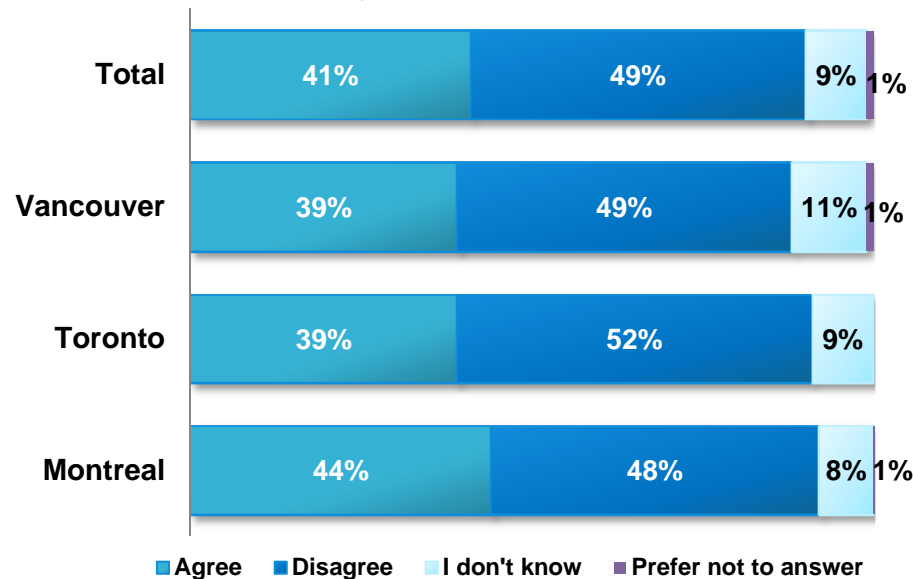
DETAILED ANALYSIS OF RESULTS

ATTITUDES AND OPINIONS

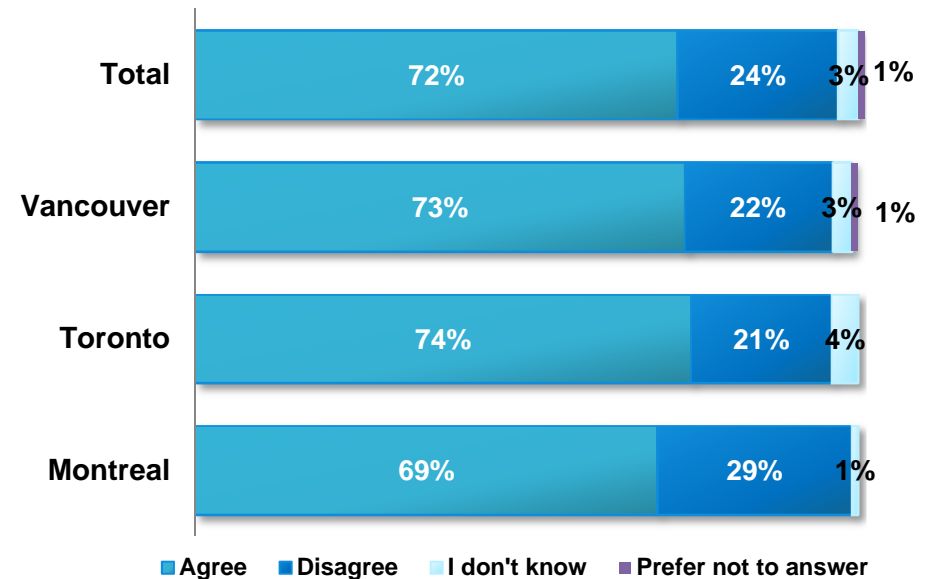
Most agree that efficient road ways are highly beneficial to all.

Commuters in the three CMAs consistently agree on the benefits of maintaining an efficient roadway system. Opinions are more divided on the issue of governments being able to fund road and bridge construction on their own, where less than half agree that this is the case. About one in ten commuters from each CMA suggest that they do not know if governments can fund these projects on their own.

“The cost of building roads / bridges is beyond the means of government alone”



“We all benefit from an efficient roadway system and should all share in the cost of maintaining it”



Road Tolls



DETAILED ANALYSIS OF RESULTS

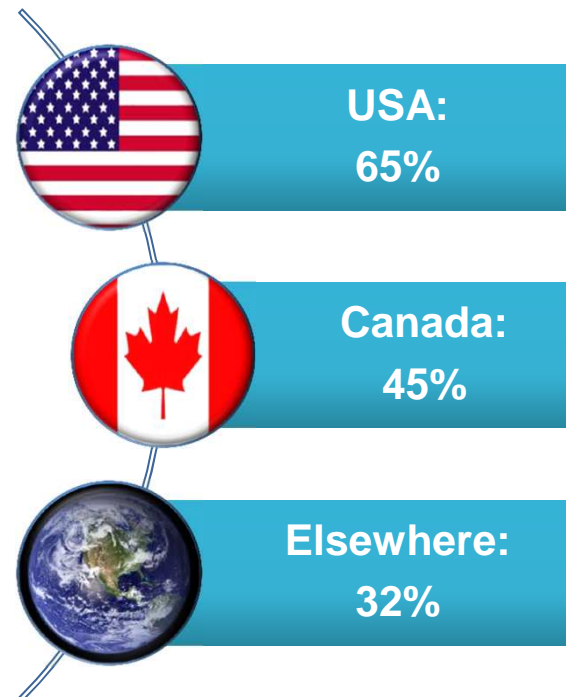
ENCOUNTERING ROAD TOLLS

Commuters commonly encountered toll roads.

Commuters can recall encountering road tolls fairly frequently in Canada, the United States, and around the world. More than half say they have encountered a toll roadway in the USA, and nearly half say the same about Canada.

	Total	Region		
		Vancouver	Toronto	Montreal
USA	65%	51%	77%	68%
Canada	45%	55%	46%	35%
Other countries	32%	29%	29%	38%
I don't know	11%	12%	8%	13%
Prefer not to answer	2%	2%	1%	3%

Overall, road tolls have been encountered in...





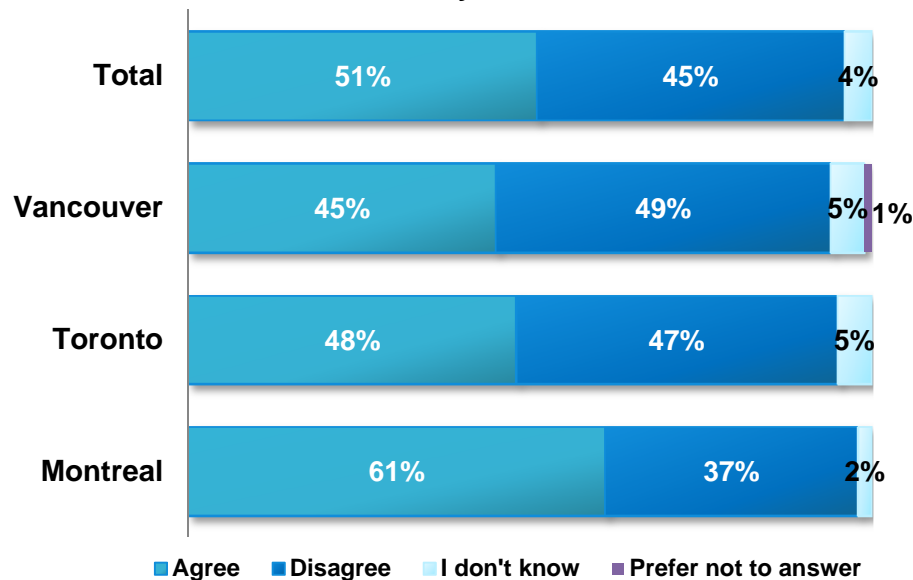
DETAILED ANALYSIS OF RESULTS

ATTITUDES AND OPINIONS ABOUT TOLL ROADS

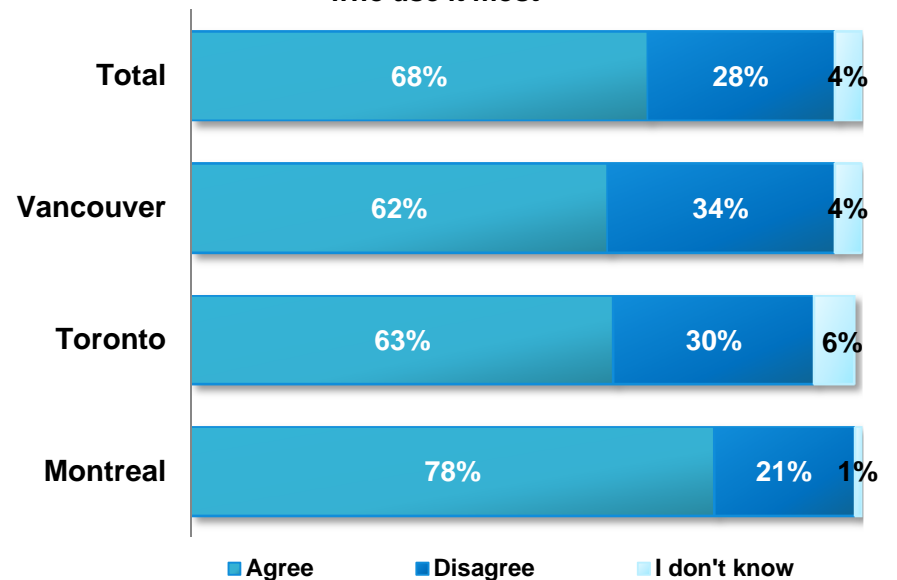
Commuters divided on toll roads.

Commuters in each CMA tend to be divided on the issue of road tolls. Overall, only half agree that those who drive cars should pay fees for the roads that they use. This belief is, however, more common in Montreal than it is in either Toronto or Vancouver. That said, the majority agree with the fundamental logic underpinning toll roads; that they put the financial burden on those who use the roads most.

“Those who drive cars should pay users fees for the roads they use”



“A toll puts the financial burden where it belongs, with those who use it most”





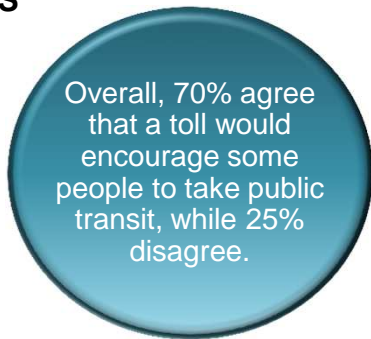
DETAILED ANALYSIS OF RESULTS

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ENCOURAGING USE OF TRANSIT WITH TOLLS

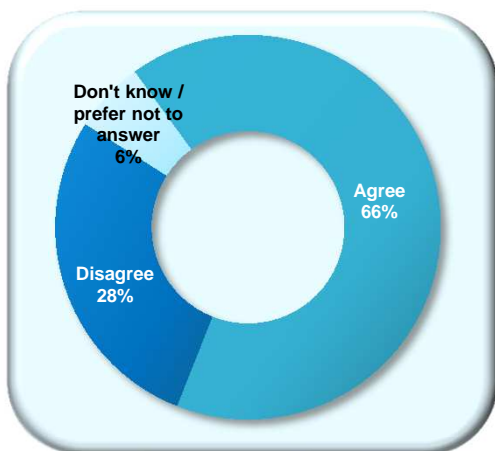
Most agree tolls will help reduce road traffic.

A substantial proportion of commuters believe that a toll road will encourage some to switch to public transit. This belief is consistent between all three CMAs.

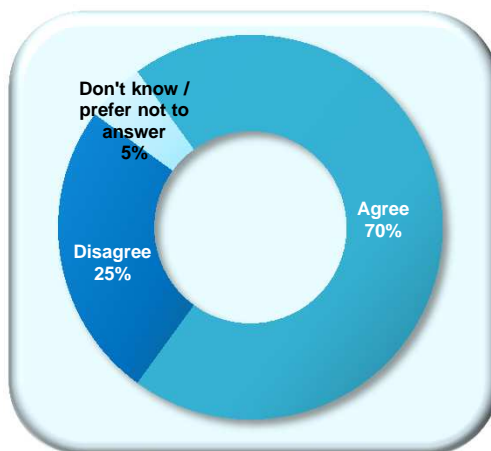


“A toll will encourage some people to use public transit”

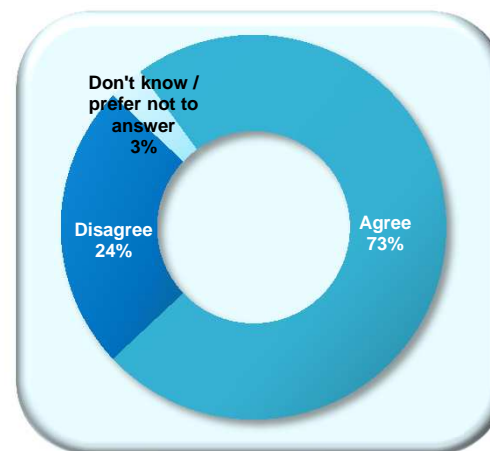
Vancouver



Toronto



Montreal





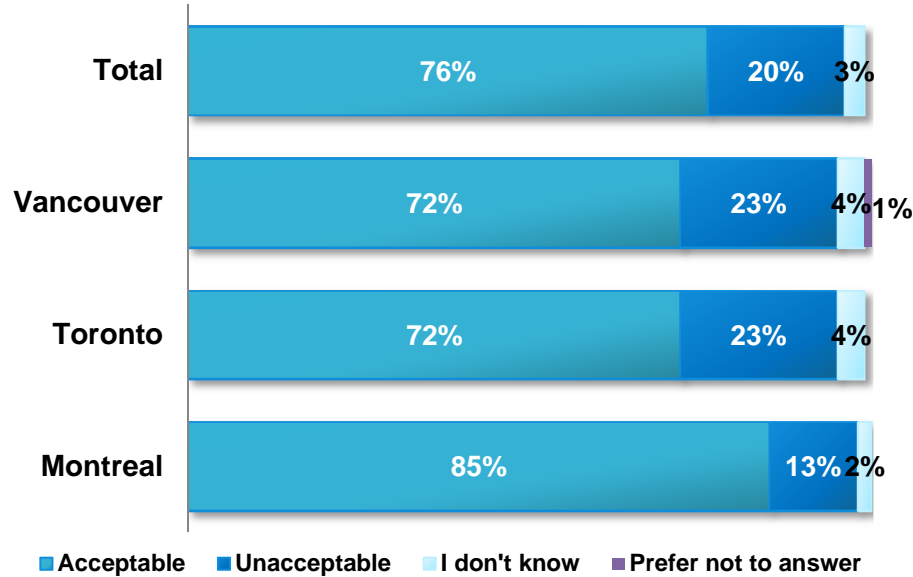
DETAILED ANALYSIS OF RESULTS

REACTIONS TO ADDING TOLLS

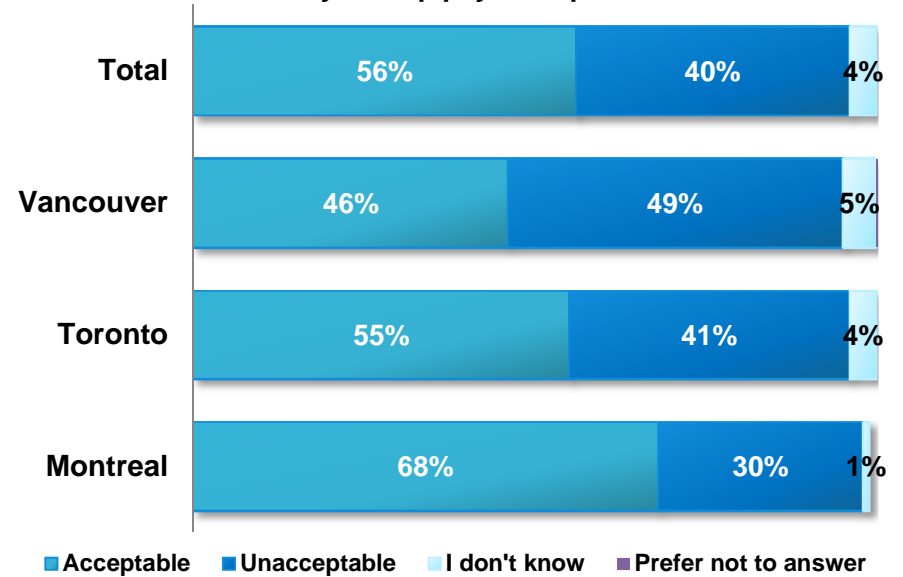
Support for toll routes is strongest in Montreal.

While most support the idea of placing tolls on new construction, fewer believe that a toll should be added to existing toll-free roads or bridges. The exception to this trend is found among Montreal commuters, who are generally supportive of road tolls, and who are apt to say that even current toll-free roads can be re-designated as a toll route.

“How acceptable would it be to have a toll on a new bridge / roadway to pay for the cost of building it?”



“How acceptable would it be to have a toll on a current bridge / roadway to help pay for repairs?”





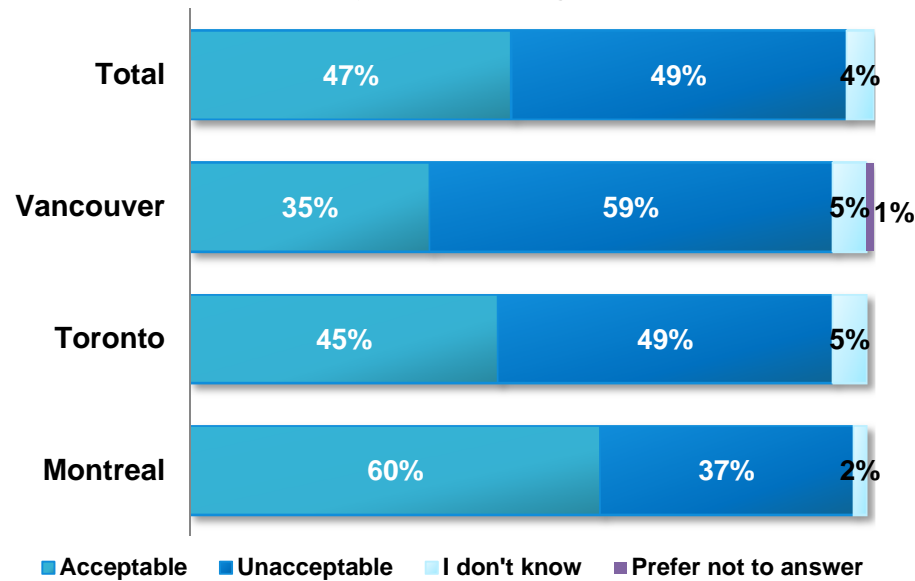
DETAILED ANALYSIS OF RESULTS

REACTIONS TO ADDING TOLLS

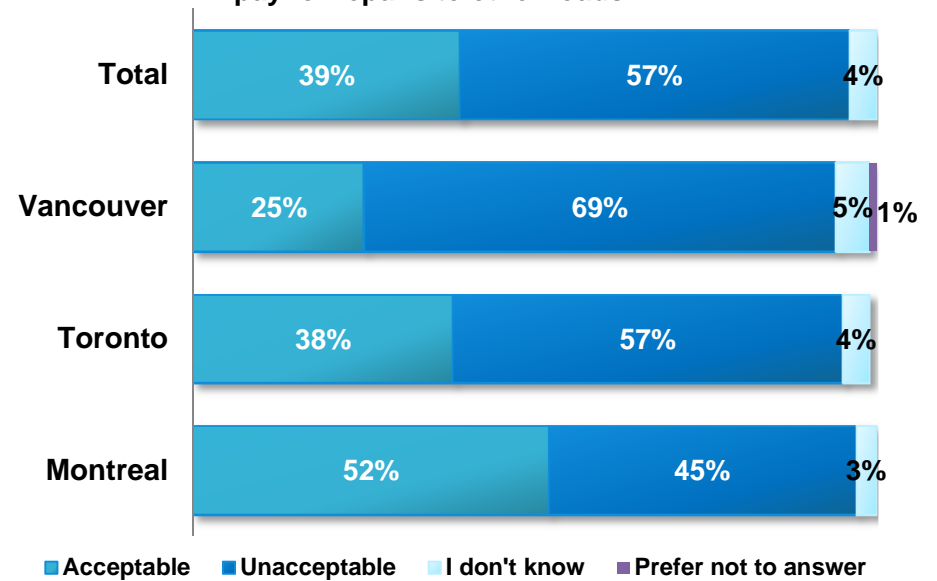
Montreal commuters support adding road tolls to existing roads

Views on adding road tolls to current roads vary in each CMA. Most often, residents of Montreal are supportive of adding road tolls to pay for transit upgrades and to pay for road repairs. Vancouverites are the least likely to accept this notion, while Torontonians are divided on the issue.

“How acceptable would it be to have a toll on a current road to pay for transit upgrades?”



“How acceptable would it be to have a toll on current roads to pay for repairs to other roads?”





DETAILED ANALYSIS OF RESULTS

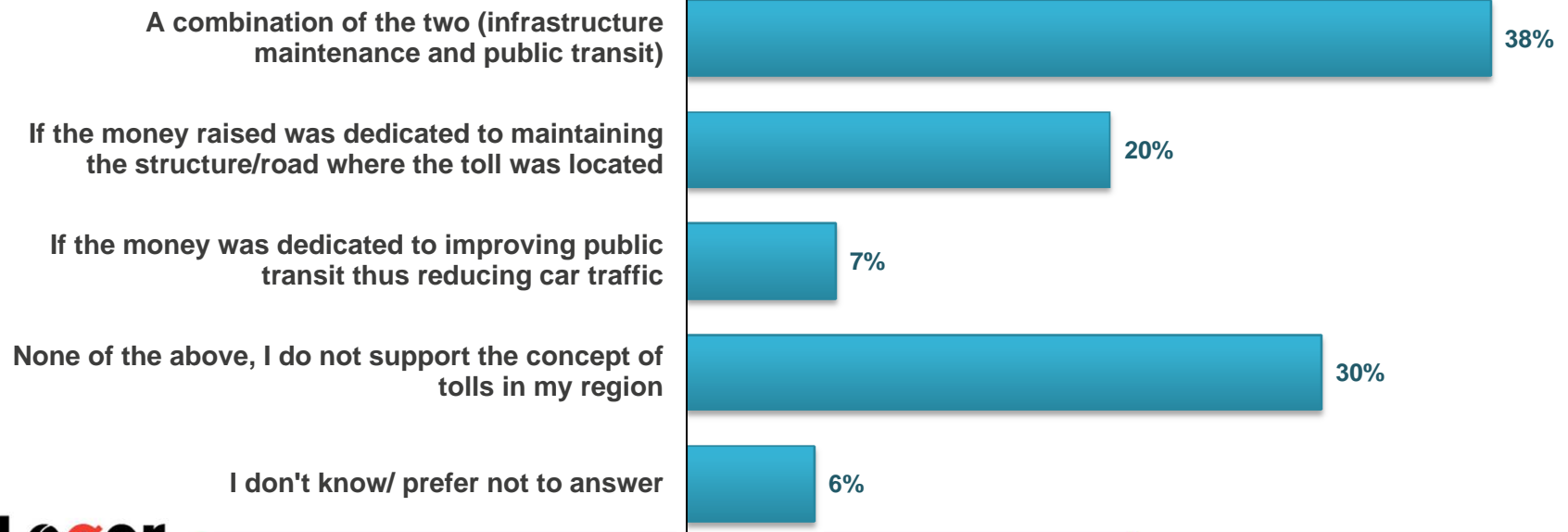
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SUPPORT FOR ROAD TOLLS (NATIONAL)

Funds raised should be dedicated to infrastructure improvement

Nationally, Canadians are the most likely to suggest that they would support a toll route if the money were dedicated to improving both public transit and road ways. A smaller proportion say that roadway improvements should be the sole beneficiary of the funds raised, while one in three say that they do not support toll roads in their area at all.

Under which circumstances would you support paying a toll? (National)





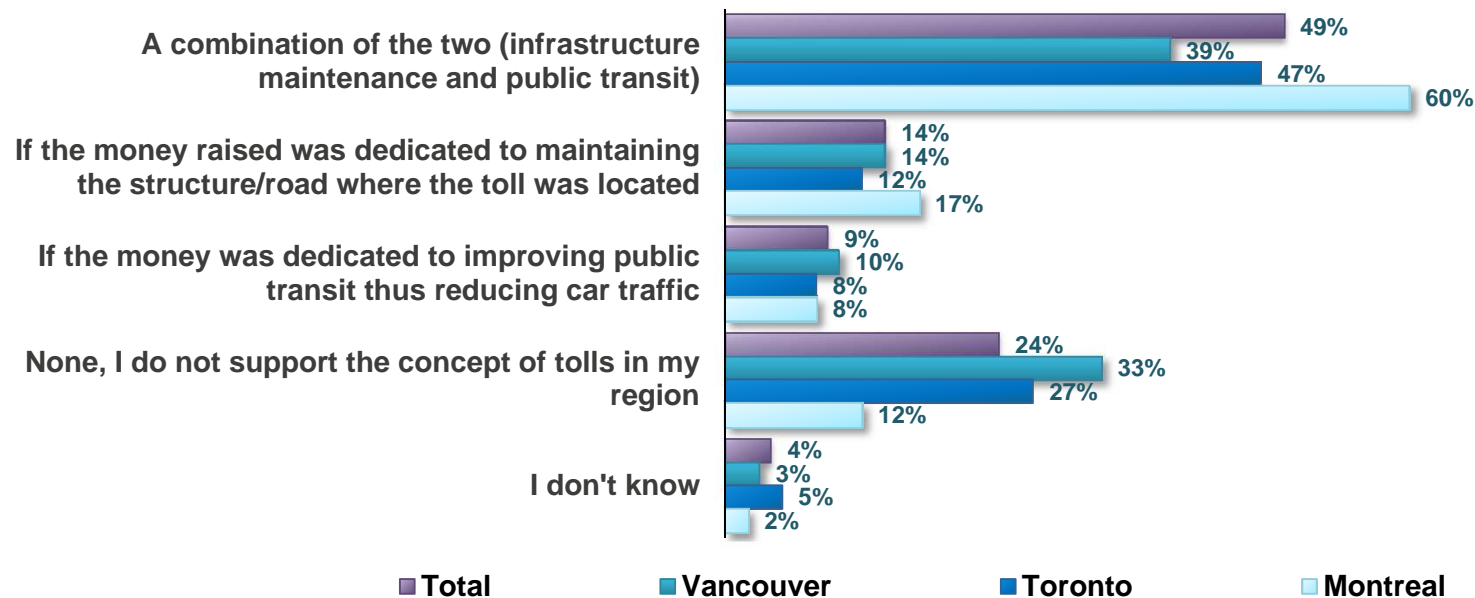
DETAILED ANALYSIS OF RESULTS

SUPPORT FOR ROAD TOLLS

A combined funding model is the most popular

In similar proportions to the national sample, commuters in the three CMAs say that they would support tolls if the funds raised were directed towards road and transit improvements. Residents of Montreal are particularly keen on a combined funding model, while residents of Vancouver are the most likely to say that they do not support toll routes at all.

Under which circumstances would you support paying a toll?





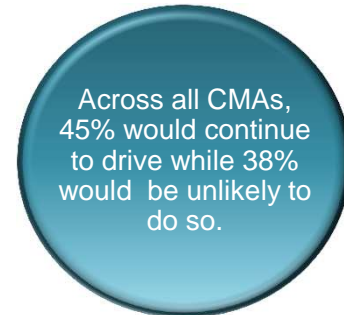
DETAILED ANALYSIS OF RESULTS

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ENCOURAGING USE OF TRANSIT WITH TOLLS

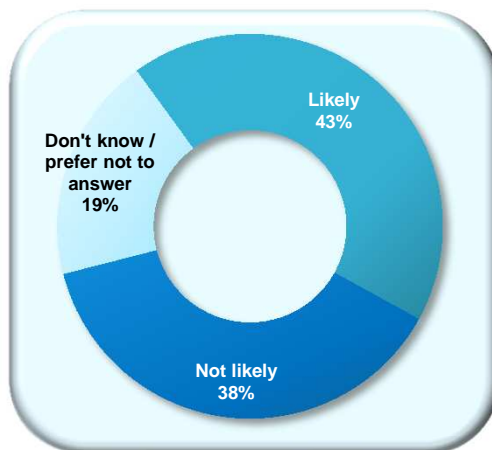
Residents of Montreal are the most likely to continue to use their cars despite tolls.

The proportion of commuters who say that they would not be likely to continue to drive in the event of the implementation of toll routes is virtually identical across all CMAs. Residents of Montreal are the most likely to suggest that they would continue to use their car if toll routes were added to their commute.

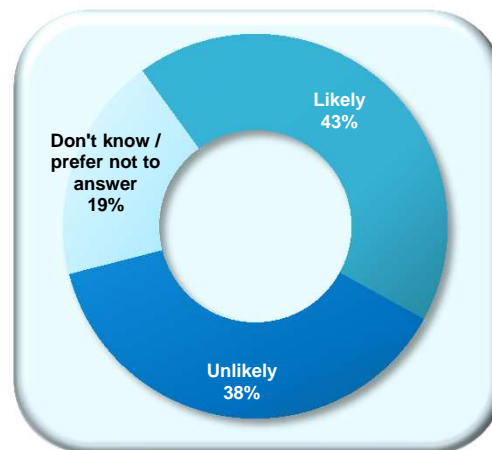


“How likely is it that you would continue to drive to work if you were required to pay a toll as part of your commute?”

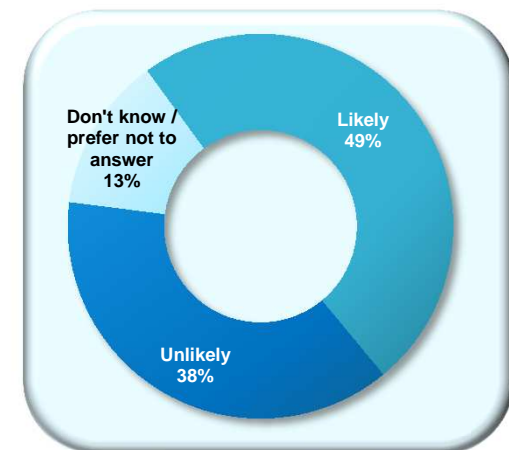
Vancouver



Toronto



Montreal





DETAILED ANALYSIS OF RESULTS

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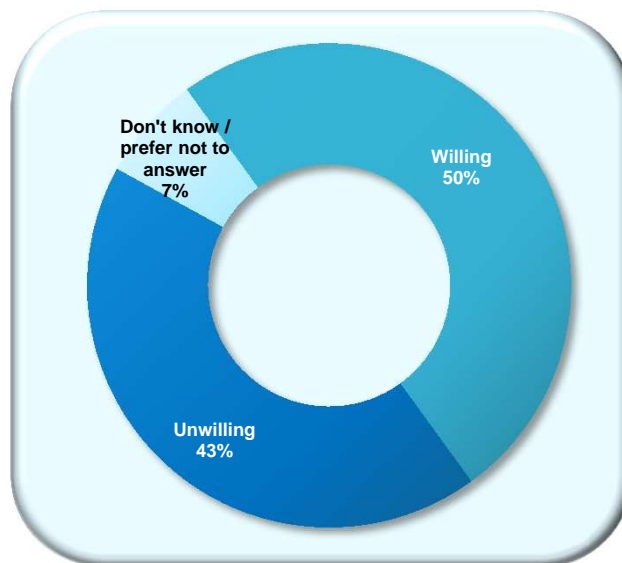
WILLINGNESS TO PAY FOR TOLLS (NATIONAL)

Half are willing to pay if commute times improve.

Half of Canadians say that they would be willing to pay for tolls for their commute if it meant better road conditions and shorter trips. Men are more likely than women to say that they would willingly pay if it improved their commute (53% vs. 48%).

“How willing would you be to pay for tolls on highways in your area if it meant improved road conditions or shorter commutes?”

National





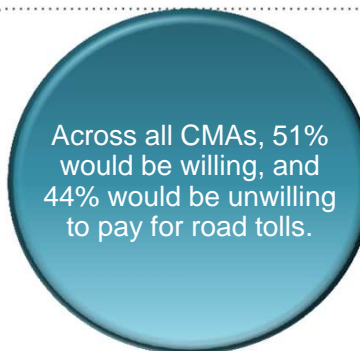
DETAILED ANALYSIS OF RESULTS

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WILLINGNESS TO PAY FOR TOLLS

Willingness to pay is strongest in Montreal.

Compared to the national numbers, Vancouverites are significantly less willing to pay road tolls than are Canadians in general. Conversely, residents of Montreal are more likely than average to say that they are willing to pay for road tolls.



“How willing would you be to pay for tolls on highways in your area if it meant improved road conditions or shorter commutes?”

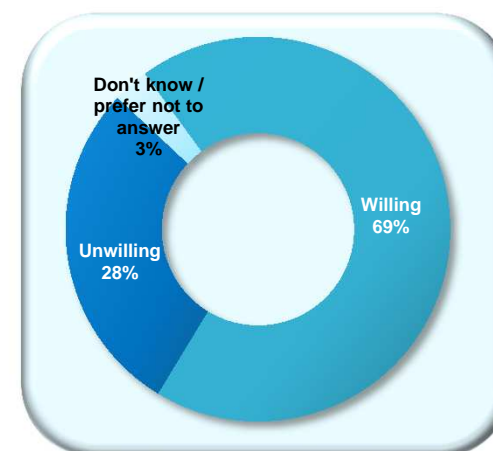
Vancouver



Toronto



Montreal





DETAILED ANALYSIS OF RESULTS

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TOLL COST

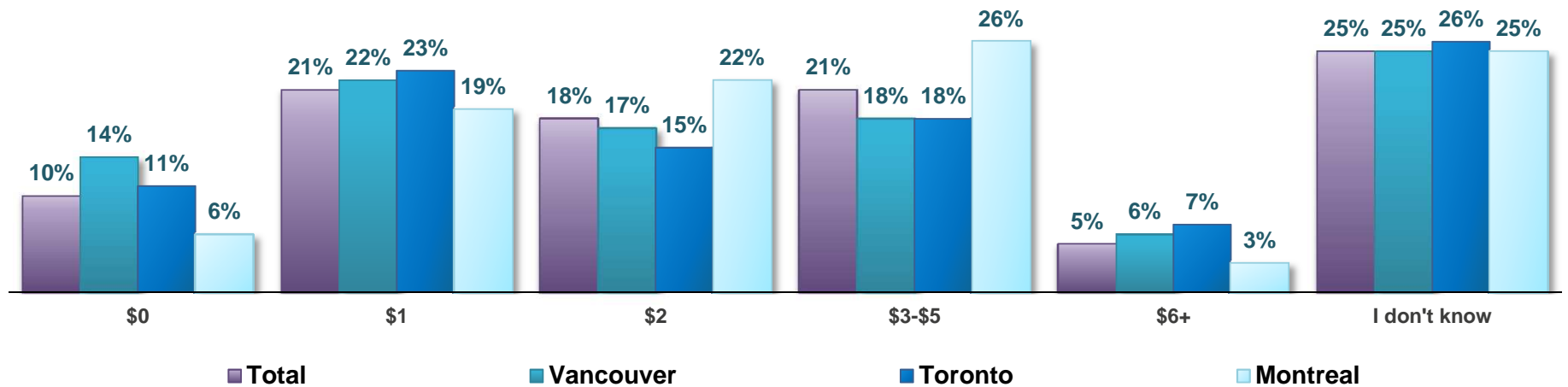
Preferred cost is \$2.60.

On average, most CMAs identify a similar average price that they would be willing to pay on a daily basis.

Average price commuters are willing to pay

Overall average all CMAs: \$3.00
Vancouver average: \$3.00
Toronto average: \$3.30
Montreal average: \$2.80

What is the most you would be willing to pay in toll fees on a daily basis?



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Q17. What is the most you would be willing to pay in toll fees on a daily basis? Base: All CMA commuters (n=1503)



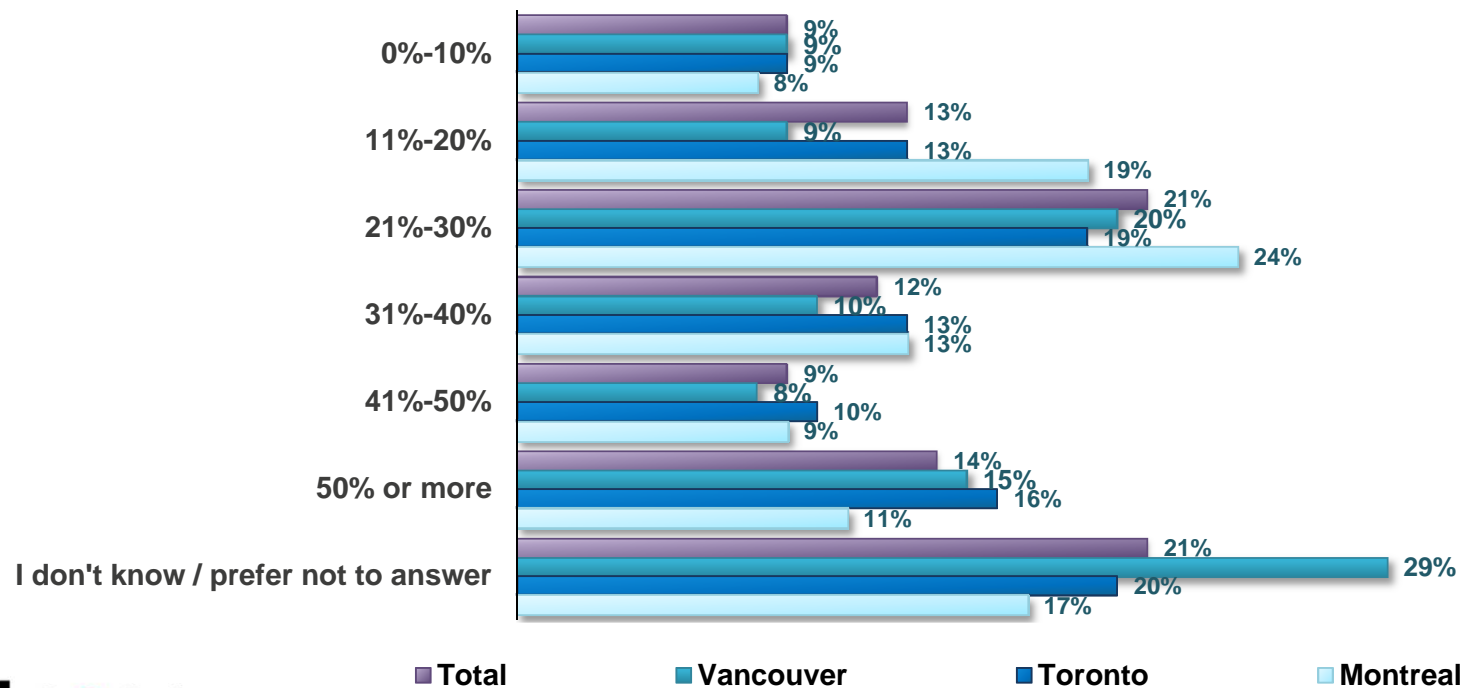
DETAILED ANALYSIS OF RESULTS

EXPECTED COMMUTE TIME SAVINGS

Commuters expect 21% to 30% time savings

Commuters have relatively high expectations concerning how much time they will save if they pay a toll. The highest concentration of commuters in each CMA expect to save time equivalent to 21% to 30% of their commute. Commuters in Montreal are the most likely to identify this range, while Vancouverites are most likely to say that they do not know.

How much time would you expect to save on your morning commute if tolls were implemented?





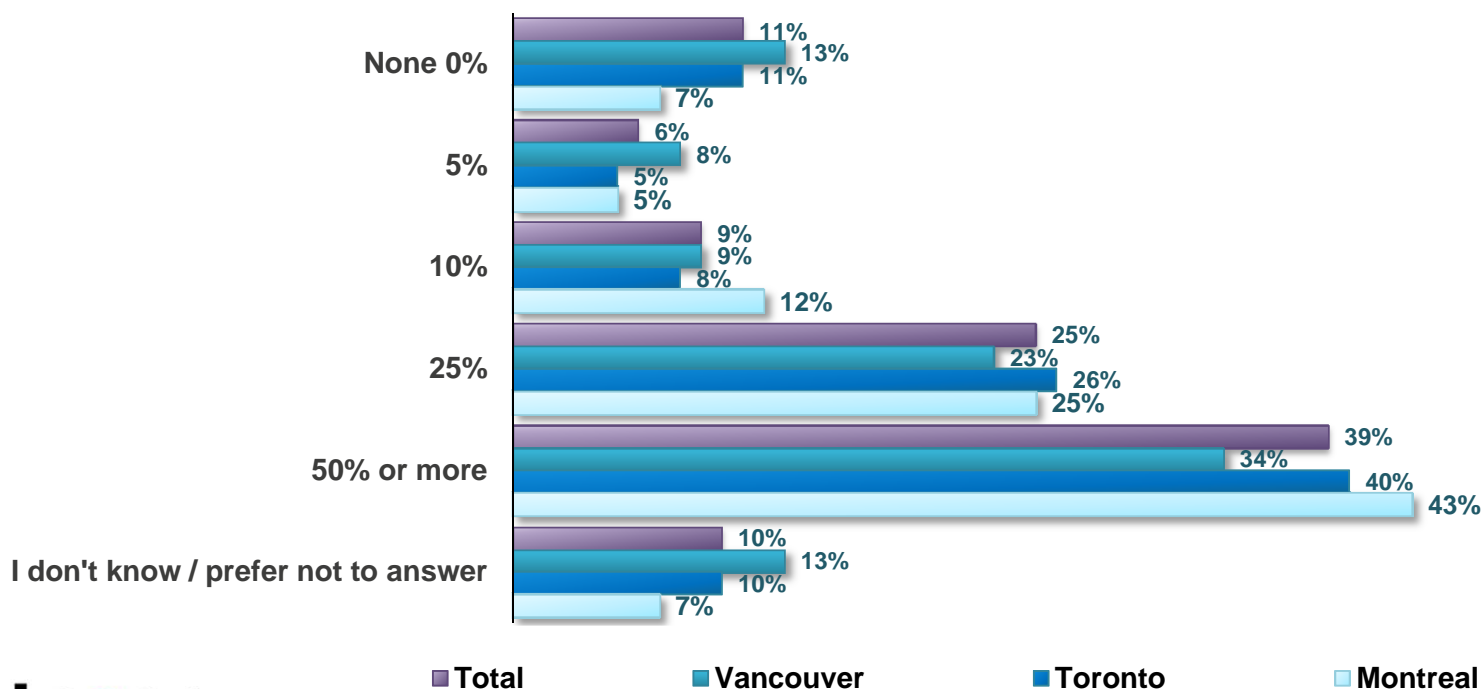
DETAILED ANALYSIS OF RESULTS

ALLOCATING TOLL FUNDS TO TRANSIT

Most advocate allocating significant amounts of toll-generated funds to public transit.

The highest concentration of commuters in each CMA say that 50% or more of the funds should go to public transit. Residents of Montreal and Toronto place particular importance on redirecting funds to public transit, while commuters in the Vancouver area typically prefer to see less of the toll-generated funds invested in this area.

If roads had tolls, what percentage of the toll money should go to public transit?



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