



The Strategic Counsel

Gregg, Kelly, Sullivan & Woolstencroft:  
The Strategic Counsel

[www.thestrategiccounsel.com](http://www.thestrategiccounsel.com)

21 St. Clair Avenue East  
Suite 1100  
Toronto, Ontario  
M4T 1L9  
Tel 416 975-4465  
Fax 416 975-1883

60 George Street  
Suite 205  
Ottawa, Ontario  
K1N 1J4  
Tel 613 236-0296  
Fax 613 236-1290



## Canadian Perceptions Toward the “New Realities of High Gas Prices”

## Implications for Public Transit and Environment Policy

August, 2008

# Research Design

# How the research was undertaken

- ◆ This report is based on 1,100 telephone surveys with those aged 18 or older living in communities across Canada with populations of 100,000 or greater. The final sample was broken out by community size as follows:
  - 500 surveys were administered in cities with populations between 100,000 and 499,999
  - 600 surveys were administered in cities with populations of 500,000 or more
  
- ◆ Within each of these community size groups, the cities included were proportionately represented in the sample frame, in accordance to Statistics Canada Census information (see the next slide for a full list of the cities included in the sample)
  - As a result, when analyzing the results of each group separately, no weighting is necessary
  - However, the combined sample of 1,100 was weighted slightly to ensure that the overall results are representative based on the proportions of population across the two community size groups
  
- ◆ Each interview was approximately 11 minutes in length and all interviews were conducted between August 14 – 22, 2008
  
- ◆ The overall results for this survey are accurate within +/-2.95%, 19 times out of 20
  - The results for cities with 100,000 to 499,999 residents are accurate within +/-4.38%, 19 times out of 20
  - The results for cities with 500,000 or more residents are accurate within +/-4.00%, 19 times out of 20

# The cities that were included in the sample

100,000-199,999		200,000-499,999	500,000 +
Abbotsford	Regina	Québec	Toronto
Cambridge	Richmond	Brampton	Montréal
Kingston	Oakville	Surrey	Calgary
Guelph	Burlington	Halifax	Ottawa
Coquitlam	Richmond Hill	Laval	Edmonton
Whitby	Greater Sudbury	London	Mississauga
Thunder Bay	Sherbrooke	Markham	Winnipeg
Saanich	Saguenay	Gatineau	Vancouver
Chatham-Kent	Oshawa	Vaughan	Hamilton
Kelowna	St. Catharines	Longueuil	
Cape Breton	Lévis	Windsor	
St. John's	Barrie	Kitchener	
	Trois-Rivières	Burnaby	
		Saskatoon	

# Highlights

# Highlights

## Get Used to High Gas Prices: Consumers say it's “the new reality”

- ◆ Consistent with other public opinion polling, there is evidence that the softening economy and rising gas prices are causing stress and strain in Canadian households of those living in Canada's larger urban centres. Some 30% say their personal financial situation has worsened in the last six months.
- ◆ Fully a third (32%) cite energy-related expenses (rising gas prices, utilities, energy costs) as the household budget issue about which they are most concerned. Moreover, one out of every five surveyed (21%) cites rising gas prices as the single household expenditure that concerns them most.
- ◆ Canadians also see little relief in the future on gas prices: an overwhelming majority (83%) believes high gas prices as a the “new reality”. About two-thirds say they are “feeling the pinch” from rising gas prices on their household budgets.

## High gas prices are prompting people to seriously rethink their transportation choices ... and public transit is a clear option

- ◆ The “new reality” is having a significant effect – 60% of people say soaring gas prices are causing them to rethink their transportation choices. When asked what kinds of changes they have made in response to the price increases, almost a quarter (23%) told us they are driving less (23%) and another 20% say they have switched or are considering a switch to public transit. Purchasing a more fuel efficient vehicle is being considered by another 16%.
- ◆ Another 20 % of respondents said they will consider switching to transit if gas prices continue to increase. In total, 40 per cent of respondents say that rising gas prices have already or will push them to consider using public transit.
- ◆ Interest in becoming a regular public transit user is, to some extent, dependent on how high gas prices rise.
  - About a quarter of those who have not already made the switch to public transit, as a result of gas price increases, say they would with gas prices fluctuating anywhere between \$1.20 and \$2.00 a litre. For another one-fifth of consumers it would take gas prices above \$2.00 a litre to prompt them to make the use public transit on a regular basis and close to half would resist taking public transit under any pricing scenario.
- ◆ The fact that almost a quarter of consumers in Canada's biggest cities are ready to make the switch to public transit with gas prices under \$2.00 per litre suggest that there could be a substantial increase in public transit usage if gas prices continue to spiral. The obvious issue here is can public transit meet this increased demand?

# Highlights

## Improving service levels and reducing waiting times would motivate more citizens to use public transit

- ◆ There are, however, some key barriers to increased use of public transit and this includes overcoming concerns about travel and wait times as well as hours of service.
  - Six-in-ten say they would be at least somewhat more likely, and a third much more likely, to think about taking public transit if point to point travel times were reduced, wait times were shortened and if public transit in their communities offered better hours of service.
- ◆ Given the renewed interest in public transit as a result of the spike in gas prices, and the improvements the public feels are necessary in order to make public transit a truly viable option, it is not surprising that an overwhelming majority (81%) support (40% strongly support) directing more of the federal gas tax to investments in public transit.

## The current national environmental strategies are not seen as enough to help average Canadians.

- ◆ Cars and trucks are viewed as the single largest source of greenhouse gases.
  - In all, four-in-ten (39%) identify vehicles on the road as the main source of greenhouse gas emissions.
  - Just under one-third (32%) point to manufacturing and another 13% single out the natural resources industry.
- ◆ The public appears to have little faith that current plans will help the average Canadian to reduce his or her carbon footprint.

# Highlights

## Overall Conclusions

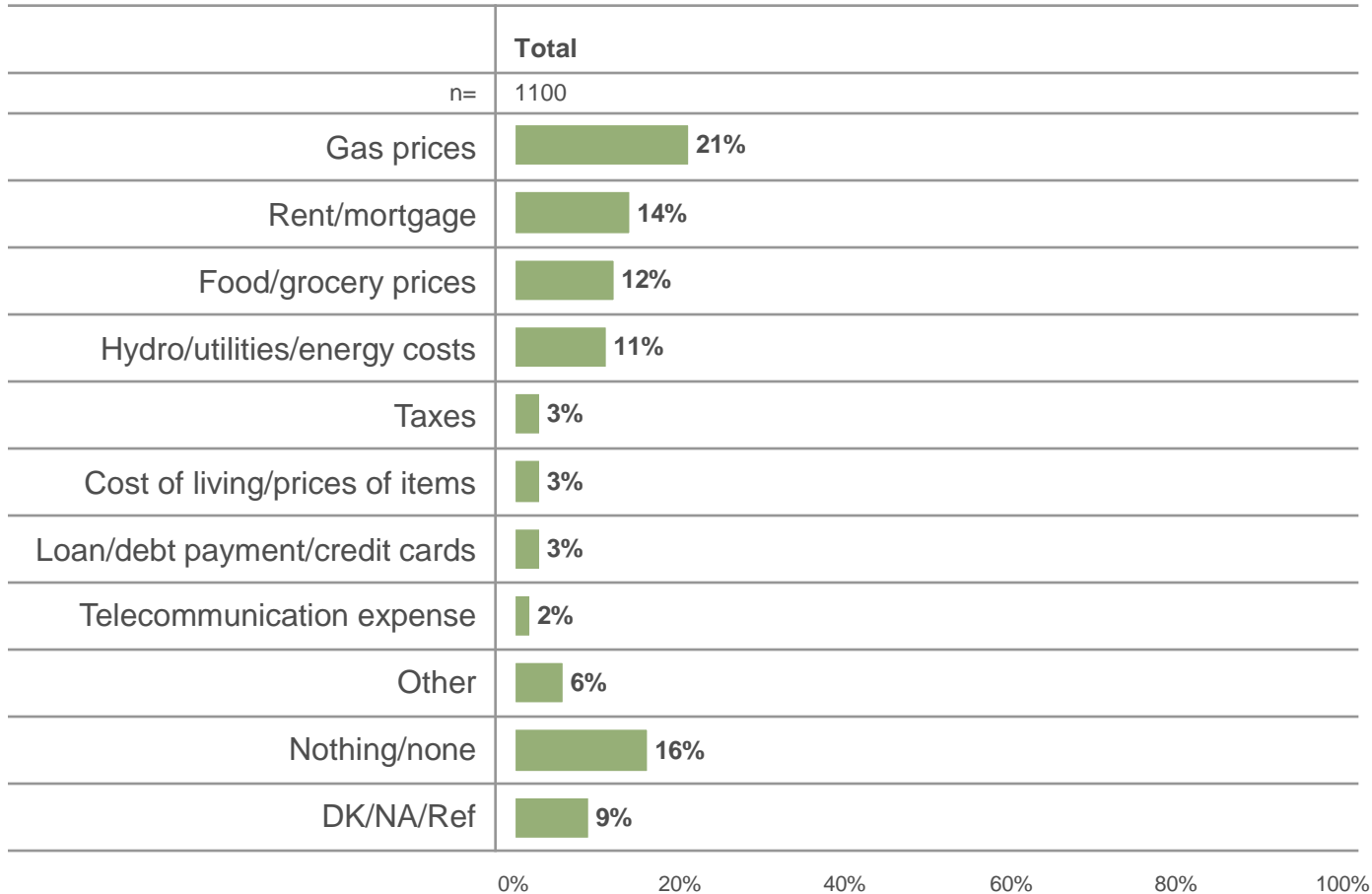
- ◆ Overall, these findings suggest that the longer term impact of rising gas prices has the potential to put considerable pressure on the public transit systems in major Canadian communities, although this demand may well be moderated without significant improvements to the system.
  
- ◆ The case for a national public transit plan is clear:
  - Canadians are starting to think more about public transit;
  - Many have already made the switch, prompted by rising gas prices;
  - Many more would do so if travel and waiting times were reduced and the hours of service were better; and
  - Overwhelming, Canadians support more of the federal gas tax being spent on reducing the number of cars and trucks on the road by improving public transit.
  
- ◆ There is strong public support for increased funding for public transit **AND** for such funding to be made part of a national environmental strategy. In part, this support is linked to the belief that cars and trucks are a significant contributor of greenhouse gas emissions and that a combination of rising gas prices with increased investment in public transit would help to reduce vehicle use and have a positive impact on the environment.



## **Detailed Findings**

The price of gas is the top concern for most people. Together with energy costs, one-third are concerned about gas/hydro/energy costs

**Top Household Expense Concerns**



Q1. Thinking about your regular monthly household expenses, what is the one issue or item that you are currently most concerned about?

Base: All respondents

# Gas prices clearly dominates the list of concerns in all parts of the country, although not quite as prominent in Quebec

Top Household Expense Concerns		Region				Community Size		
		Atlantic Cities	Quebec Cities	Ontario Cities	Western Cities	100-499k	500k+	
<b>TOTAL</b>	n=	1100	41 <sup>c</sup>	231	530	298	500	600
		%	%	%	%	%	%	%
Gas prices		21	22	14	21	25	22	19
Rent/mortgage		14	10	12	13	18	14	14
Food/grocery prices		12	17	13	13	10	11	13
Hydro/utilities/energy costs		11	20	4	13	11	11	11
Taxes		3	2	<1	4	5	3	4
Cost of living/prices of items		3	2	3	4	2	3	3
Loan/debt payment/credit cards		3	2	4	3	2	3	3
Telecommunication expense		2	-	1	2	3	2	3
Other		6	2	9	5	5	5	6
Nothing/none		16	15	23	15	14	18	16
DK/NA/Ref		9	7	18	7	5	9	9

Q1. Thinking about your regular monthly household expenses, what is the one issue or item that you are currently most concerned about?

Base: All respondents

# The issue of gas prices is a greater concern among households with incomes over \$40k and people over the age of 35

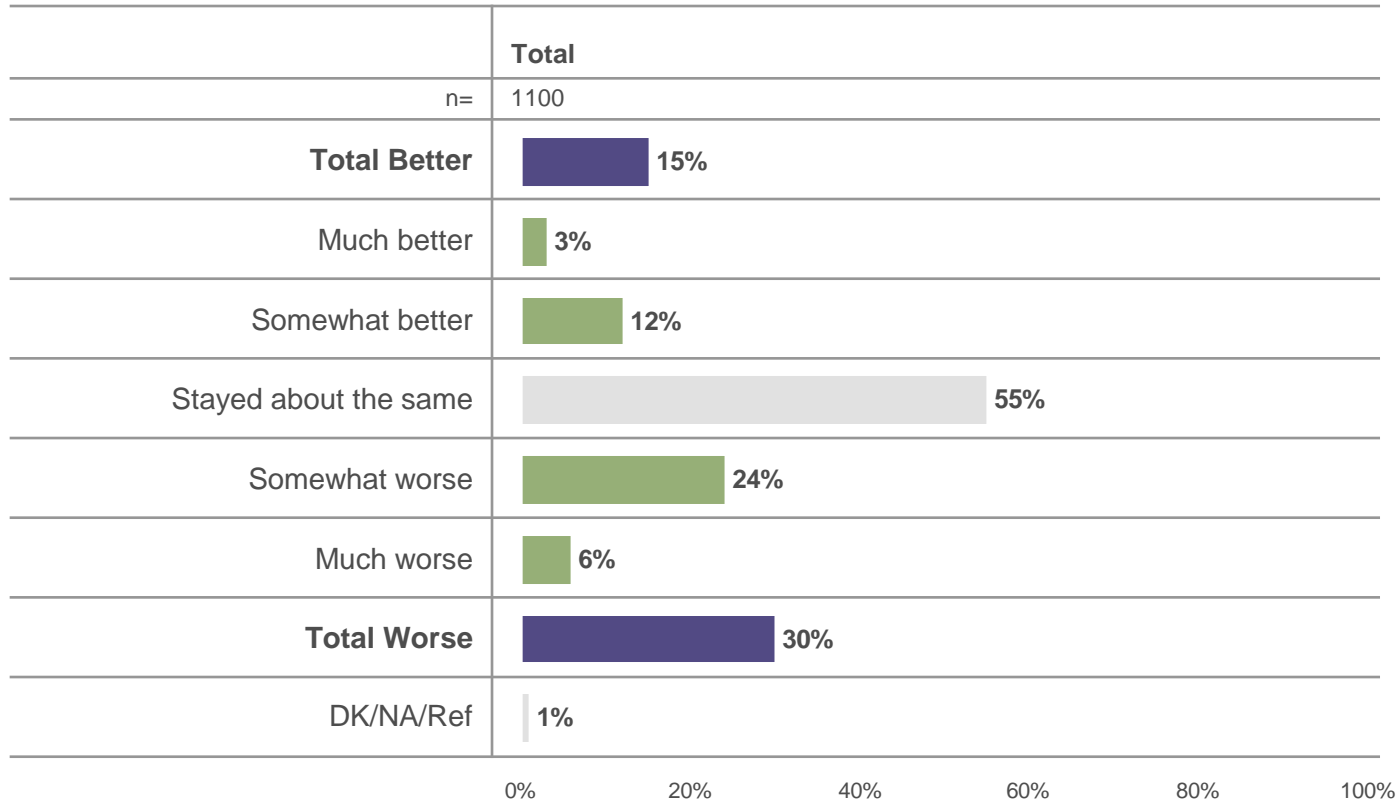
Household Expense Concerns <i>TOTAL</i>	Total	Age			Household Income		
		18-34	35-54	55+	Less than \$40K	\$40K-\$79K	\$80K+
n=	1100	232	443	407	276	330	331
	%	%	%	%	%	%	%
Gas prices	21	14	23	22	13	22	25
Rent/mortgage	14	18	16	9	19	13	12
Food/grocery prices	12	8	12	14	17	10	11
Hydro/utilities/energy costs	11	9	11	12	9	10	13
Taxes	3	<1	3	6	4	4	2
Cost of living/prices of items	3	<1	5	2	3	4	3
Loan/debt payment/credit cards	3	5	3	2	4	4	3
Telecommunication expense	2	3	3	<1	1	3	2
Other	6	6	5	6	4	6	6
Nothing/none	16	19	14	18	13	17	17
DK/NA/Ref	9	18	6	7	13	7	7

Q1. Thinking about your regular monthly household expenses, what is the one issue or item that you are currently most concerned about?

Base: All respondents

# Twice as many people say their personal financial situation is worsening than say it is improving

## Status of Personal Financial Situation



Q2. In the past six months, would you say that your personal financial situation has gotten much worse, somewhat worse, stayed about the same, gotten somewhat better, or gotten much better?

Base: All respondents

# Those who are feeling most vulnerable are urban residents in Atlantic Canada ...

Status of Personal Financial Situation	Total	Region				Community Size	
		Atlantic Cities	Quebec Cities	Ontario Cities	Western Cities	100-499k	500k+
<b>TOTAL</b>	n= 1100	41 <sup>c</sup>	231	530	298	500	600
	%	%	%	%	%	%	%
<b>Total Better</b>	<b>15</b>	<b>7</b>	<b>15</b>	<b>14</b>	<b>16</b>	<b>12</b>	<b>17</b>
Much better	3	2	4	3	3	2	4
Somewhat better	11	5	11	10	14	9	13
Stayed about the same	55	46	59	55	53	55	54
Somewhat worse	24	41	21	23	27	27	22
Much worse	6	5	3	8	4	6	6
<b>Total Worse</b>	<b>30</b>	<b>46</b>	<b>25</b>	<b>30</b>	<b>31</b>	<b>33</b>	<b>28</b>
DK/NA/Ref	1	-	1	1	<1	<1	1

Q2. In the past six months, would you say that your personal financial situation has gotten much worse, somewhat worse, stayed about the same, gotten somewhat better, or gotten much better?

Base: All respondents

# ... and people living in Canada's larger urban communities with an annual household income of less than \$40k

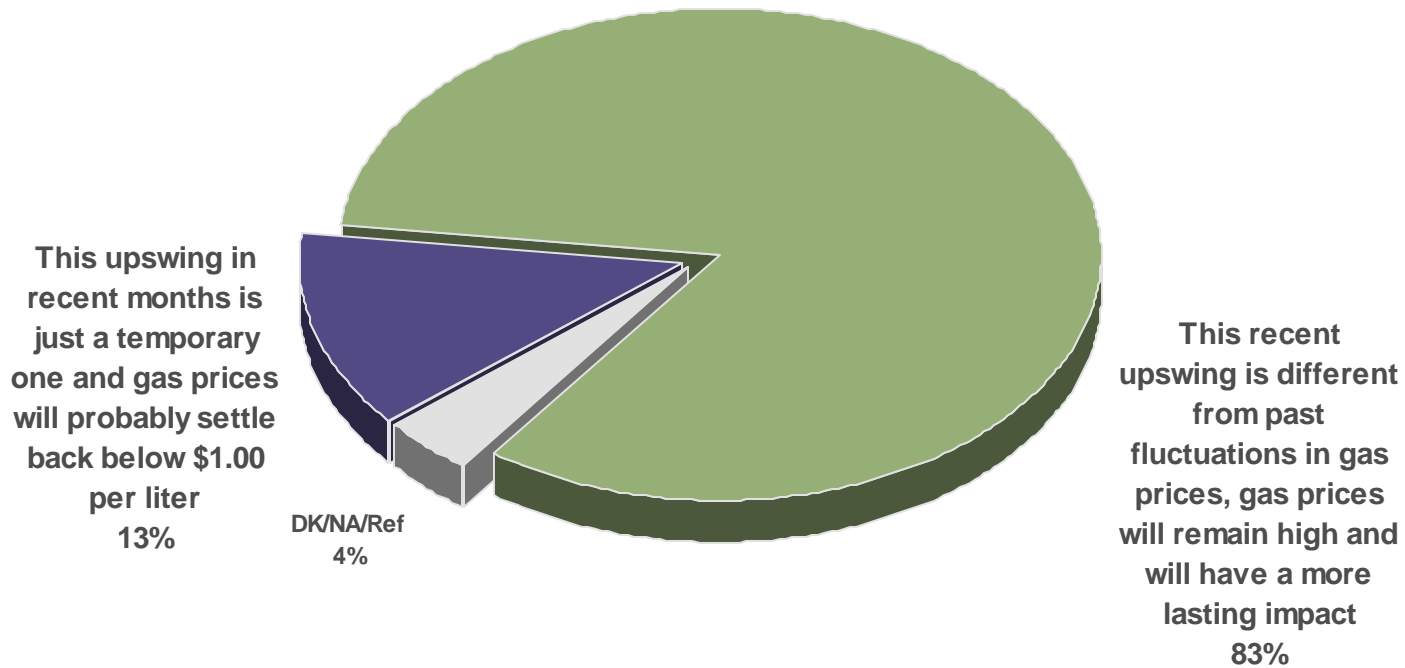
Status of Personal Financial Situation	Total	Age			Household Income			
		18-34	35-54	55+	Less than \$40K	\$40K-\$79K	\$80K+	
<b>TOTAL</b>								
	n=	1100	232	443	407	276	330	331
		%	%	%	%	%	%	%
<b>Total Better</b>	<b>15</b>	<b>23</b>	<b>16</b>	<b>8</b>	<b>13</b>	<b>14</b>	<b>20</b>	
Much better	3	3	5	2	2	4	4	
Somewhat better	12	20	11	6	11	10	16	
Stayed about the same	55	52	51	59	46	55	58	
Somewhat worse	24	20	24	26	28	26	20	
Much worse	6	3	7	6	12	5	2	
<b>Total Worse</b>	<b>30</b>	<b>23</b>	<b>31</b>	<b>32</b>	<b>40</b>	<b>31</b>	<b>22</b>	
DK/NA/Ref	1	2	1	<1	1	1	-	

Q2. In the past six months, would you say that your personal financial situation has gotten much worse, somewhat worse, stayed about the same, gotten somewhat better, or gotten much better?

Base: All respondents

# High gas prices are viewed as “new fact of life”

## Opinions on the Future of Gas Prices



Q3. As you may know, the price of gasoline at the pump has been fluctuating in recent months, with a general trend toward rising prices over the last six months. Which of the following best describes your view of the current situation ... would you say that ...

Base: All respondents (n-1100)



# This 'new fact of life' is real for people in all regions ...

Opinions the Future of Gas Prices <i>TOTAL</i>	Total	Region				Community Size	
		Atlantic Cities	Quebec Cities	Ontario Cities	Western Cities	100-499k	500k+
n=	1100	41 <sup>c</sup>	231	530	298	500	600
	%	%	%	%	%	%	%
This upswing in recent months is just a temporary one and gas prices will probably settle back below \$1.00 per liter	13	15	13	13	13	15	12
This recent upswing is different from past fluctuations in gas prices, gas prices will remain high and will have a more lasting impact	83	78	84	83	84	82	84
DK/NA/Ref	4	7	2	4	3	3	4

Q3. As you may know, the price of gasoline at the pump has been fluctuating in recent months, with a general trend toward rising prices over the last six months. Which of the following best describes your view of the current situation ... would you say that ...

Base: All respondents

... and is now a “fact” across all age and income groups

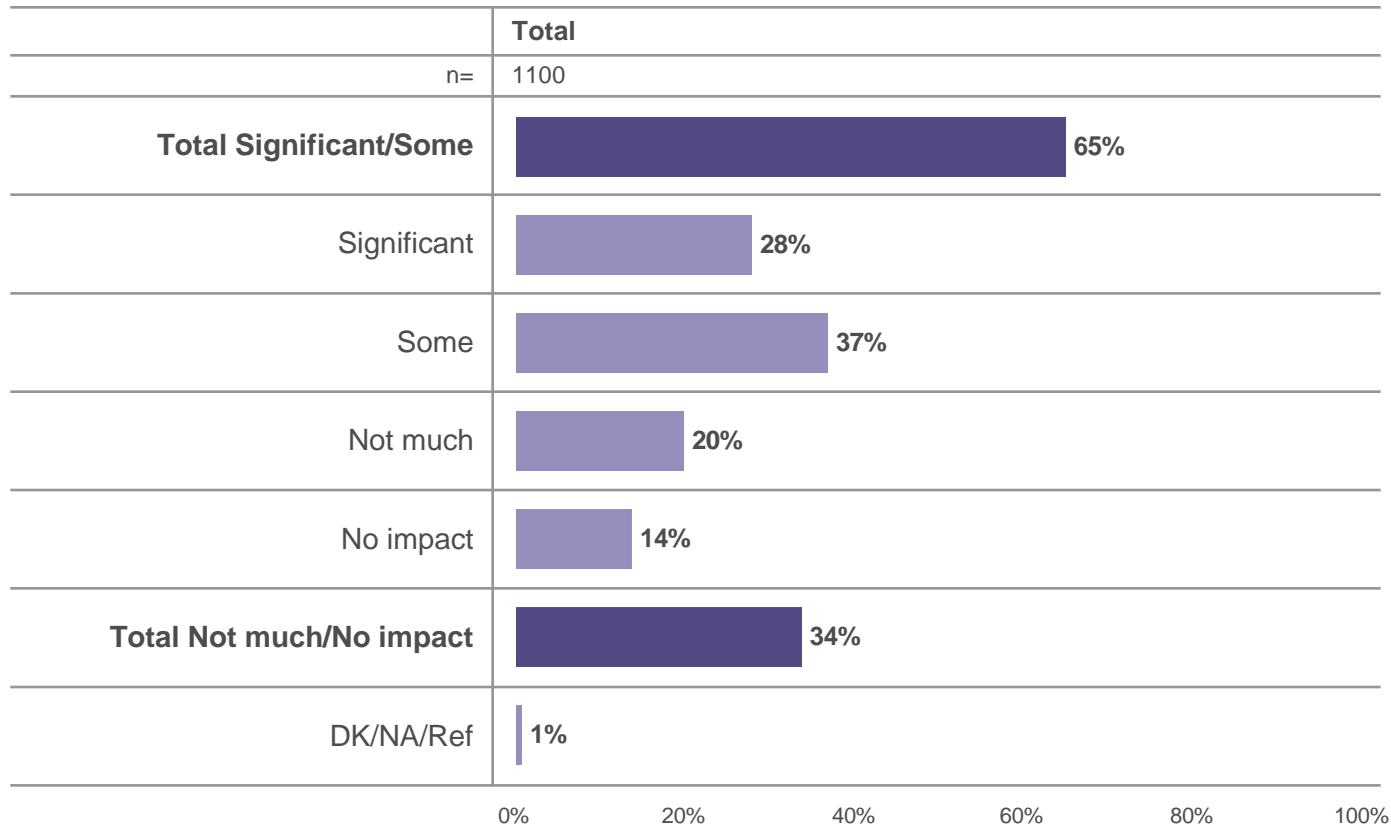
Opinions On Gas Prices <i>TOTAL</i>	Total	Age			Household Income		
		18-34	35-54	55+	Less than \$40K	\$40K-\$79K	\$80K+
n=	1100	232	443	407	276	330	331
	%	%	%	%	%	%	%
This upswing in recent months is just a temporary one and gas prices will probably settle back below \$1.00 per liter	13	11	13	15	14	14	13
This recent upswing is different from past fluctuations in gas prices, gas prices will remain high and will have a more lasting impact	83	85	84	81	80	84	86
DK/NA/Ref	4	4	3	4	5	2	1

Q3. As you may know, the price of gasoline at the pump has been fluctuating in recent months, with a general trend toward rising prices over the last six months. Which of the following best describes your view of the current situation ... would you say that ...

Base: All respondents

# Further, the “new reality of high oil prices” is squeezing household budgets

## Effect of gas prices on household budget



Q4. To what extent is your household budget feeling the pinch from rising gas prices? Would you say the price of gas has had a significant, some, not much or no impact on your household budget?

Base: All respondents

Again, people are feeling the pinch of this “new reality” regardless of where they live ...

Effect of gas prices on household budget <i>TOTAL</i>	Total	Region				Community Size	
		Atlantic Cities	Quebec Cities	Ontario Cities	Western Cities	100-499k	500k+
n=	1100	41 <sup>c</sup>	231	530	298	500	600
	%	%	%	%	%	%	%
<b>Total Significant/Some</b>	<b>65</b>	<b>61</b>	<b>58</b>	<b>68</b>	<b>67</b>	<b>69</b>	<b>62</b>
Significant	28	22	18	32	31	30	27
Some	37	39	40	36	36	39	35
Not much	20	24	22	19	21	21	20
No impact	14	15	20	12	11	10	17
<b>Total Not much/No impact</b>	<b>34</b>	<b>39</b>	<b>42</b>	<b>31</b>	<b>33</b>	<b>30</b>	<b>37</b>
DK/NA/Ref	1	-	-	1	<1	<1	1

Q4. To what extent is your household budget feeling the pinch from rising gas prices? Would you say the price of gas has had a significant, some, not much or no impact on your household budget?

Base: All respondents

... and while higher gas prices are influencing all income groups, middle-aged people appear to be feeling the brunt of this “new reality” the most

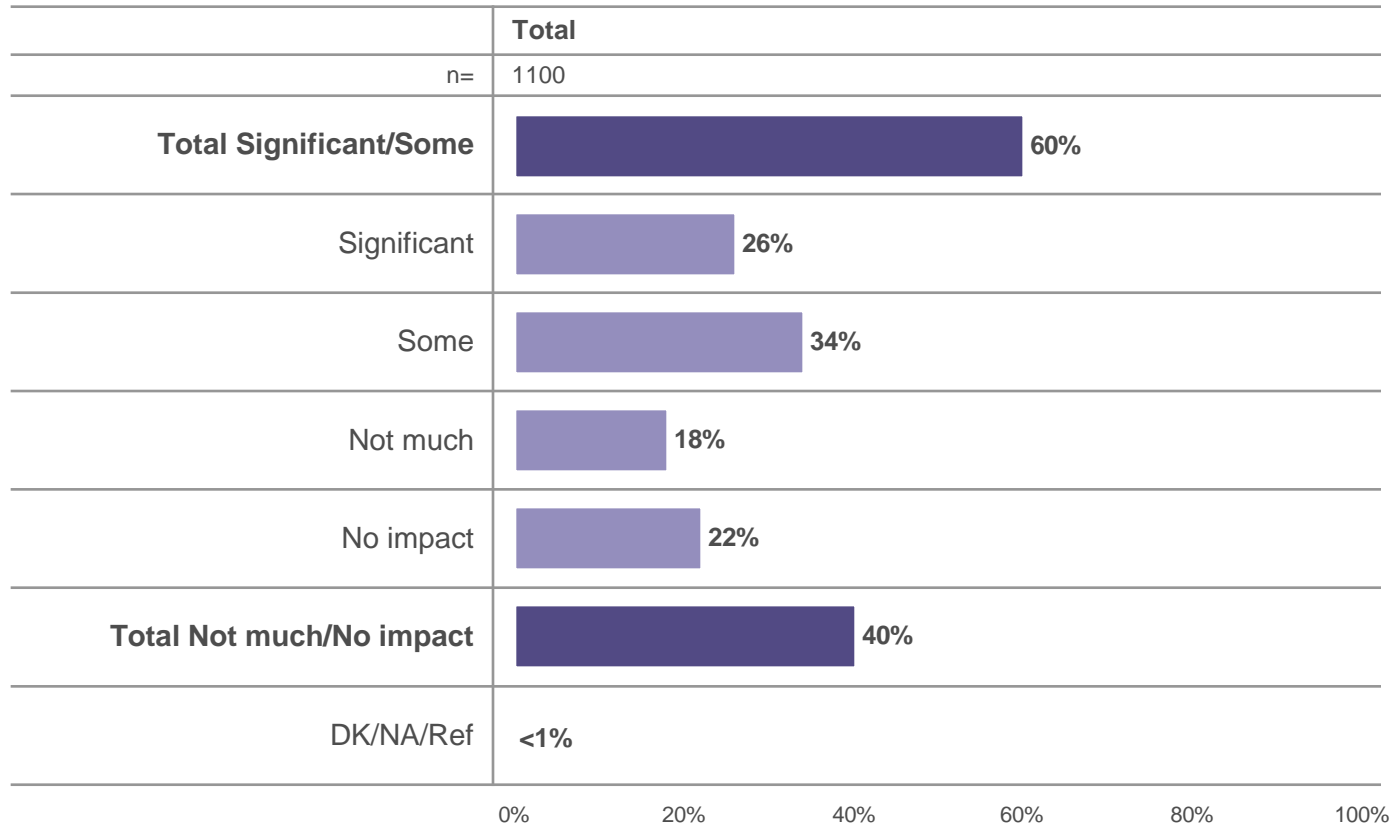
Effect of gas prices on household budget <i>TOTAL</i>	Total	Age			Household Income		
		18-34	35-54	55+	Less than \$40K	\$40K-\$79K	\$80K+
n=	1100	232	443	407	276	330	331
	%	%	%	%	%	%	%
<b>Total Significant/Some</b>	<b>65</b>	<b>59</b>	<b>73</b>	<b>60</b>	<b>63</b>	<b>67</b>	<b>66</b>
Significant	28	23	35	24	35	30	20
Some	37	36	38	36	28	37	46
Not much	20	23	19	22	14	23	23
No impact	14	18	7	18	22	10	10
<b>Total Not much/No impact</b>	<b>34</b>	<b>41</b>	<b>26</b>	<b>40</b>	<b>36</b>	<b>33</b>	<b>33</b>
DK/NA/Ref	1	1	1	<1	1	-	<1

Q4. To what extent is your household budget feeling the pinch from rising gas prices? Would you say the price of gas has had a significant, some, not much or no impact on your household budget?

Base: All respondents

# The “new reality” is causing many households to re-consider their transportation options

## Effect of Rising Gas prices on transportation choices



Q5. And, to what extent have rising gas prices made you and your household rethink your transportation choices including, how and what you drive? Would you say it has had a significant impact, some impact, not much impact or no impact at all?

Base: All respondents

# People living in communities of under 500,000 are among the most likely to be rethinking their transportation choices

Effect of gas prices on transportation choices	Total	Region				Community Size	
		Atlantic Cities	Quebec Cities	Ontario Cities	Western Cities	100-499k	500k+
<b>TOTAL</b>	n= 1100	41 <sup>c</sup>	231	530	298	500	600
	%	%	%	%	%	%	%
<b>Total Significant/Some</b>	<b>60</b>	<b>59</b>	<b>55</b>	<b>61</b>	<b>62</b>	<b>65</b>	<b>56</b>
Significant	26	22	22	28	27	28	24
Some	34	37	33	33	35	37	32
Not much	18	17	17	17	19	17	19
No impact	22	24	27	22	18	18	26
<b>Total Not much/No impact</b>	<b>40</b>	<b>41</b>	<b>44</b>	<b>39</b>	<b>37</b>	<b>34</b>	<b>44</b>
DK/NA/Ref	<1	-	<1	<1	1	<1	1

Q5. And, to what extent have rising gas prices made you and your household rethink your transportation choices including, how and what you drive? Would you say it has had a significant impact, some impact, not much impact or no impact at all?

Base: All respondents

And, the “new reality” is also having a greater impact on middle-aged people – about two-thirds are reconsidering their transportation options

Effect of gas prices on transportation choices	Total	Age			Household Income		
		18-34	35-54	55+	Less than \$40K	\$40K-\$79K	\$80K+
<b>TOTAL</b>							
n=	1100	232	443	407	276	330	331
	%	%	%	%	%	%	%
<b>Total Significant/Some</b>	<b>60</b>	<b>59</b>	<b>65</b>	<b>55</b>	<b>58</b>	<b>63</b>	<b>62</b>
Significant	26	25	30	22	33	27	22
Some	34	34	35	33	25	36	40
Not much	18	14	17	20	13	18	18
No impact	22	27	18	24	28	19	20
<b>Total Not much/No impact</b>	<b>40</b>	<b>41</b>	<b>35</b>	<b>44</b>	<b>41</b>	<b>37</b>	<b>38</b>
DK/NA/Ref	<1	-	<1	1	<1	-	<1

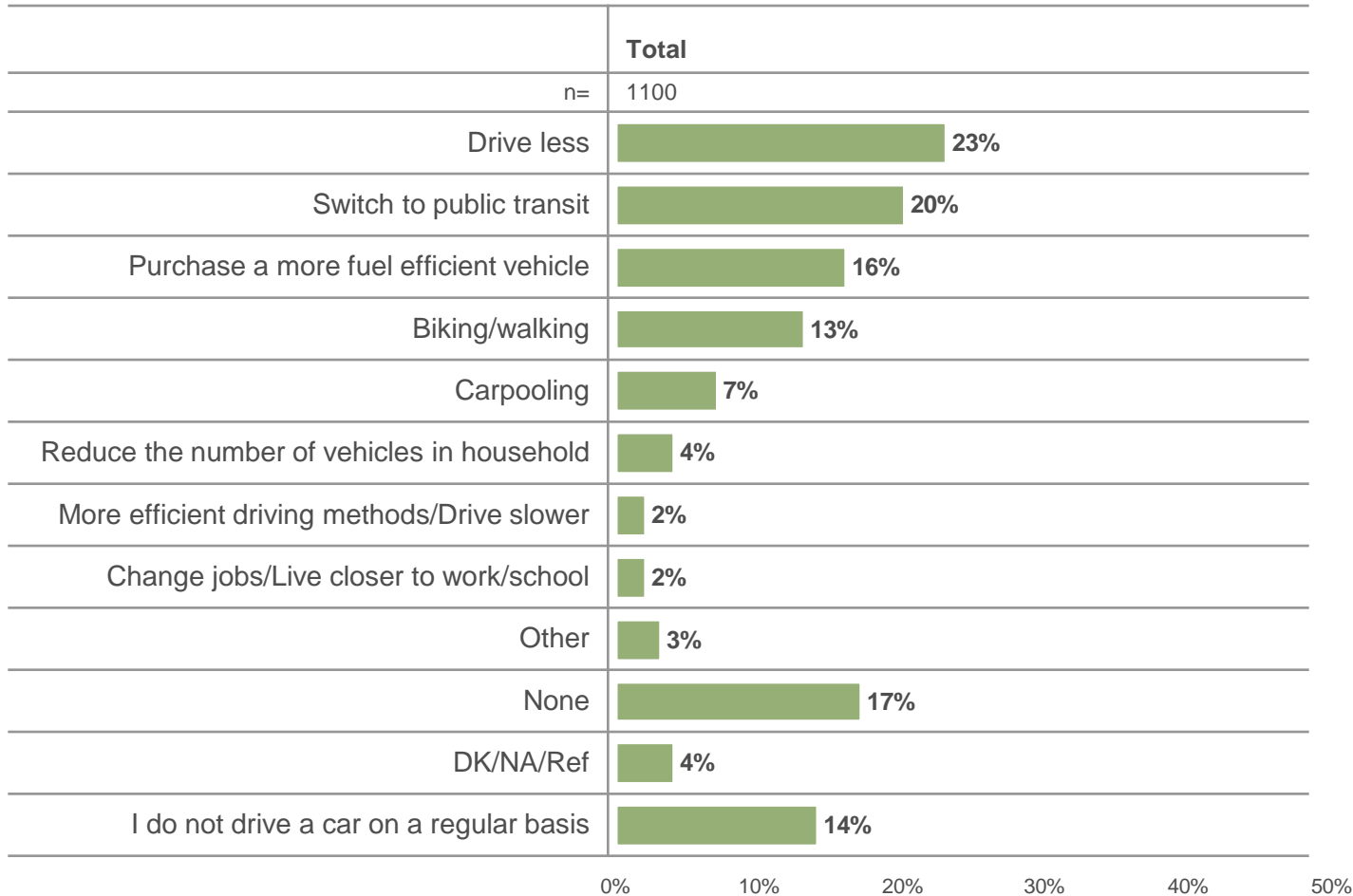
Q5. And, to what extent have rising gas prices made you and your household rethink your transportation choices including, how and what you drive? Would you say it has had a significant impact, some impact, not much impact or no impact at all?

Base: All respondents



# Many are ready to respond to the “new reality” by turning away from cars and toward public transit

## Changes to transportation choices



Q6. Specifically what kinds of changes have you or members of your household made or thought about making regarding transportation choices?

Base: All respondents

The switch to public transit is more likely to be occurring in larger communities, while those living in communities of under 500k are more inclined to say they are driving less

Changes to transportation choices <i>TOTAL</i>	Total							
		Atlantic Cities	Quebec Cities	Ontario Cities	Western Cities	100-499k	500k+	
	n=	1100	41 <sup>c</sup>	231	530	298	500	600
		%	%	%	%	%	%	%
Drive less		23	20	12	27	27	26	21
Switch to public transit		20	17	27	19	17	13	26
Purchase a more fuel efficient vehicle		16	10	14	18	16	20	13
Biking/walking		13	24	15	12	10	11	14
Carpooling		7	-	4	8	7	7	6
Reduce the number of vehicles in household		4	7	7	3	2	4	4
More efficient driving methods/Drive slower		2	2	7	1	1	2	3
Change jobs/Live closer to work/school		2	-	1	2	2	2	1
Other		3	2	3	3	2	3	3
None		17	17	10	18	18	14	19
DK/NA/Ref		4	2	9	3	2	4	3
I do not drive a car on a regular basis		14	12	18	13	15	12	17

Q6. Specifically what kinds of changes have you or members of your household made or thought about making regarding transportation choices?

Base: All respondents

# Youth and the less affluent are more likely to be making the switch to public transit, while those with higher incomes are driving less

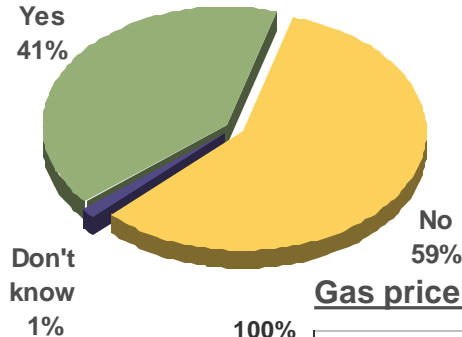
Changes to transportation choices <i>TOTAL</i>	Total	Age			Household Income		
		18-34	35-54	55+	Less than \$40K	\$40K-\$79K	\$80K+
n=	1100	232	443	407	276	330	331
	%	%	%	%	%	%	%
Drive less	23	17	26	25	19	25	25
Switch to public transit	20	24	19	19	28	20	15
Purchase a more fuel efficient vehicle	16	17	19	14	11	16	24
Biking/walking	13	16	12	12	17	13	11
Carpooling	7	8	8	3	7	5	9
Reduce the number of vehicles in household	4	3	4	4	4	4	5
More efficient driving methods/Drive slower	2	3	3	1	2	2	3
Change jobs/Live closer to work/school	2	3	2	<1	1	1	3
Other	3	2	4	2	2	3	3
None	17	17	14	18	15	15	17
DK/NA/Ref	4	4	4	3	5	4	3
I do not drive a car on a regular basis	14	18	10	18	16	14	10

Q6. Specifically what kinds of changes have you or members of your household made or thought about making regarding transportation choices?

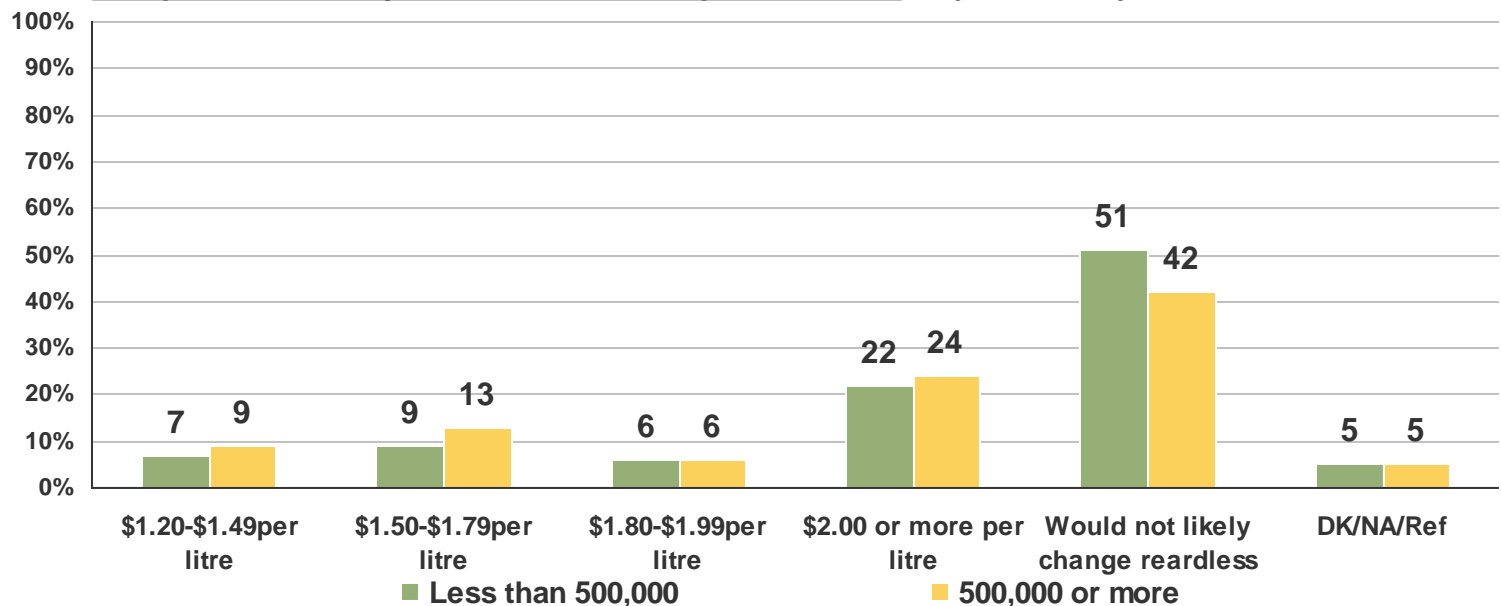
Base: All respondents

# While many people have already made the switch to public transit, among those who haven't, residents of larger communities are a little more likely to do so at lower gas prices

## Use public transit on a regular basis because of gas prices



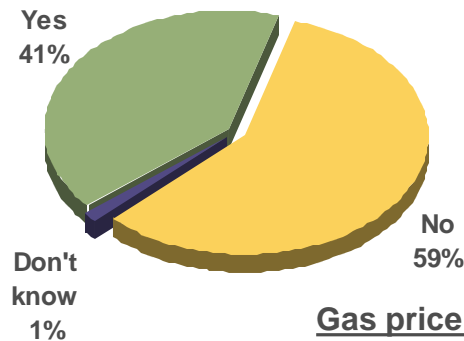
## Gas price at which you would switch to public transit – by community size



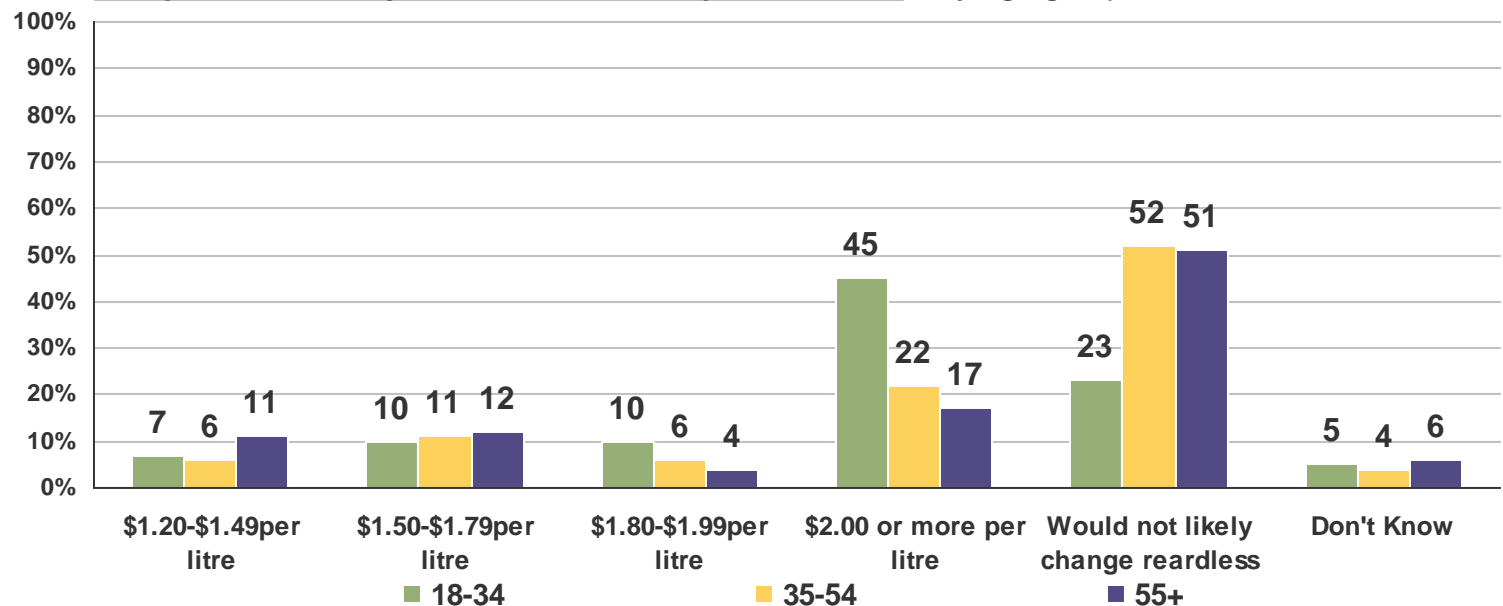
Q7. Now, I'm going to read you a list of some things that consumers have done in response to rising gas prices. I'd like you to tell me if this is something that you, or a member of your household, have already done or are considering doing. If not, I would like to know whether this is something you would be likely to do if the price of gasoline rose to a particular level.  
Base: Among those respondents who have at least one car in the household

# Those aged 18-34 are much more likely to consider taking public transit, but it will take gas prices of over \$2/litre to make them switch

## Use public transit on a regular basis because of gas prices



## Gas price at which you would switch to public transit – by age group

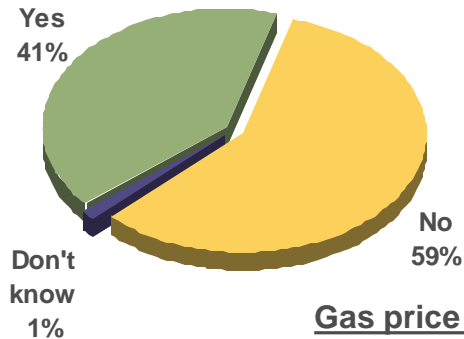


Q7. Now, I'm going to read you a list of some things that consumers have done in response to rising gas prices. I'd like you to tell me if this is something that you, or a member of your household, have already done or are considering doing. If not, I would like to know whether this is something you would be likely to do if the price of gasoline rose to a particular level.

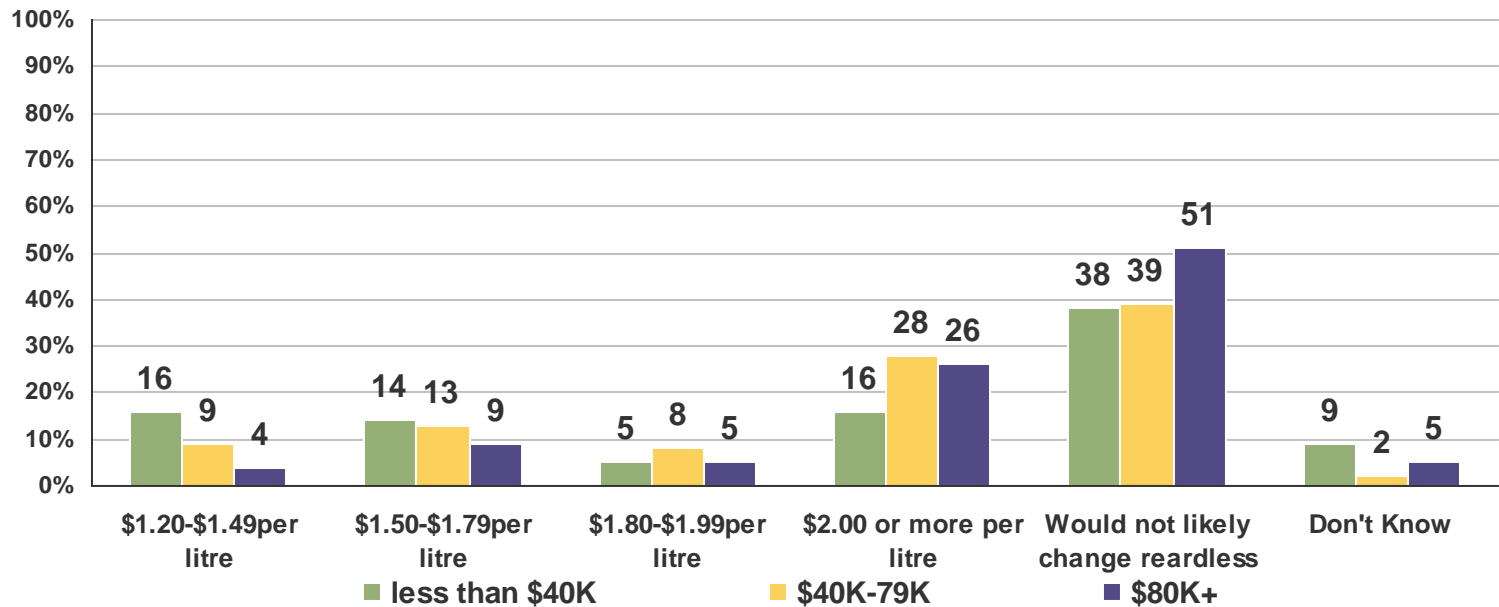
Base: All respondents

# The less affluent are more likely to switch to public transit at lower gas prices

## Use public transit on a regular basis because of gas prices



## Gas price at which you would switch to public transit – by household income

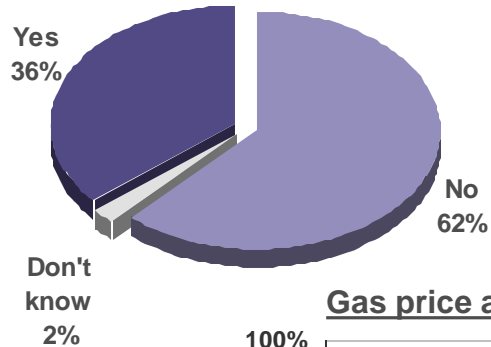


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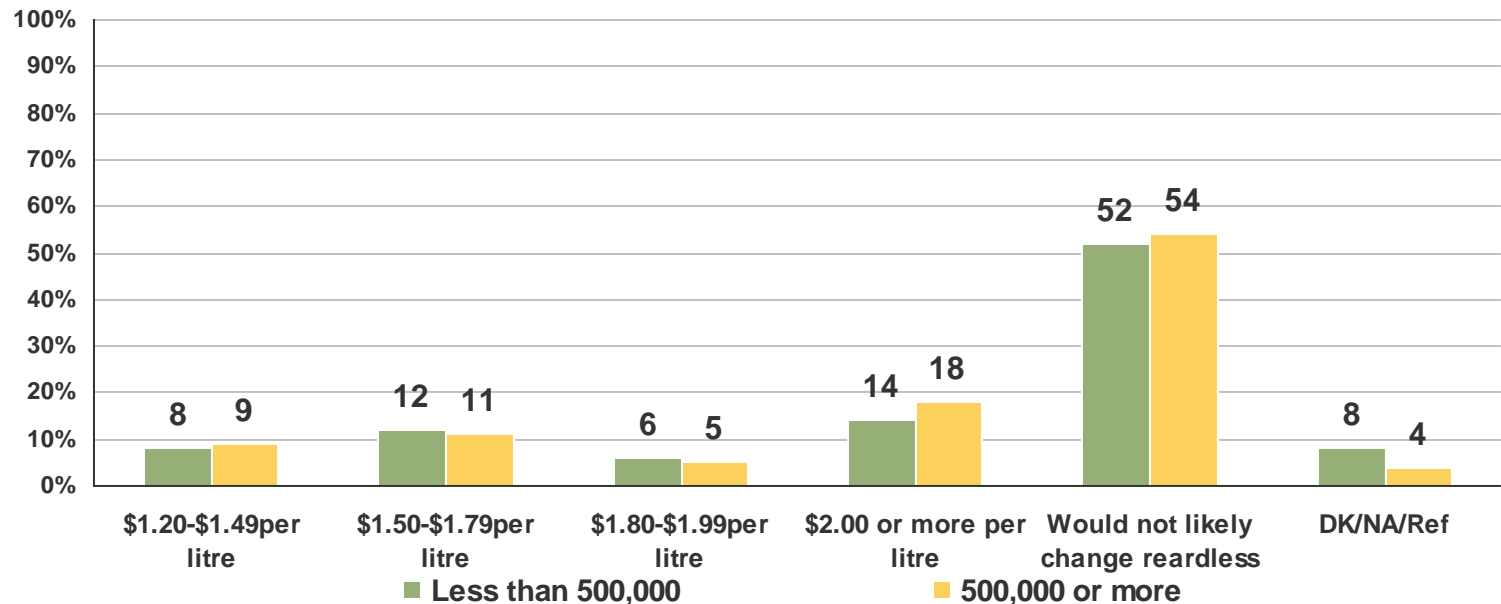
Base: All respondents

# Community size does not seem to impact the decision to carpool

## Are carpooling because of gas prices



## Gas price at which you would consider carpooling – by community size

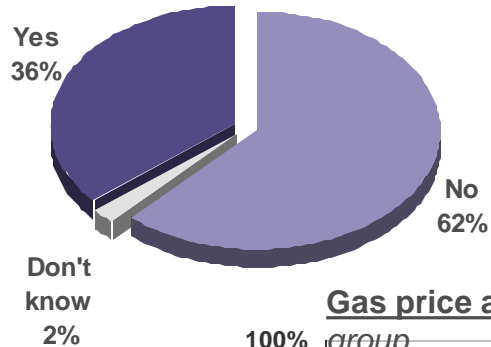


Q7. Now, I'm going to read you a list of some things that consumers have done in response to rising gas prices. I'd like you to tell me if this is something that you, or a member of your household, have already done or are considering doing. If not, I would like to know whether this is something you would be likely to do if the price of gasoline rose to a particular level.

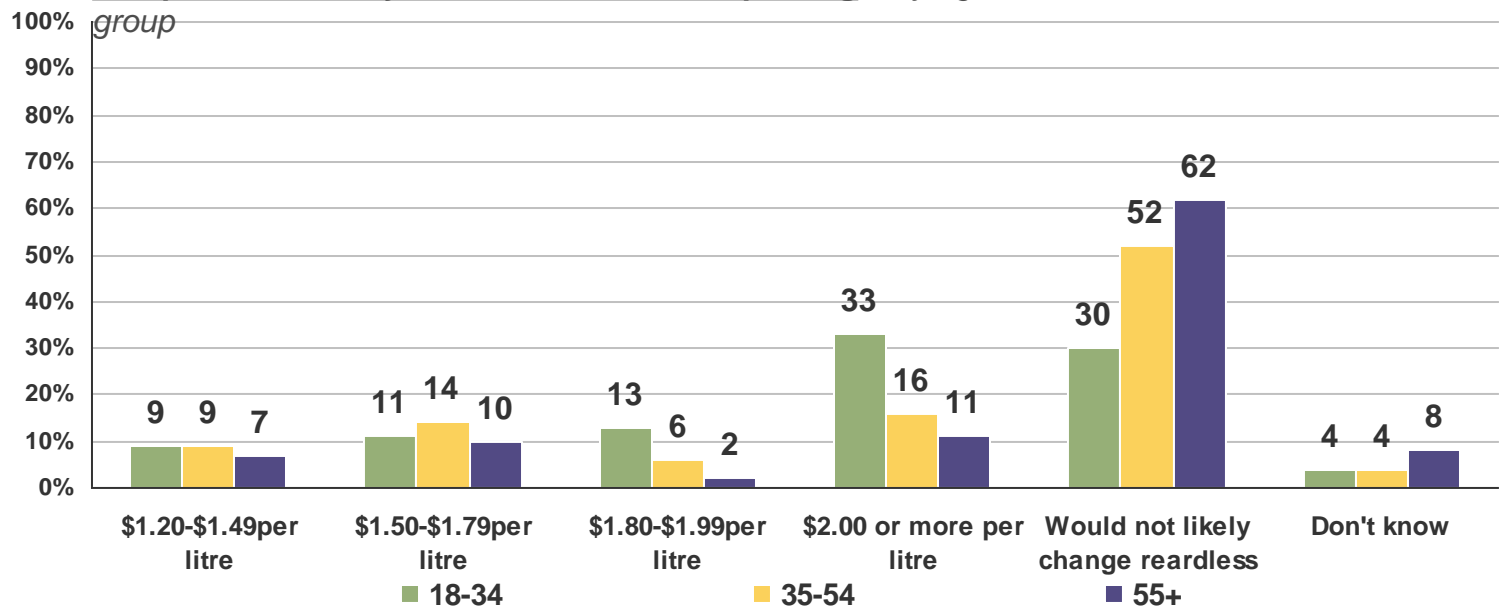
Base: Among those respondents who have at least one car in the household

# Those aged 18-34 are much more likely to consider carpooling, but it will take gas prices of over \$2/litre to make them double up

## Are carpooling because of gas prices



## Gas price at which you would consider carpooling – by age



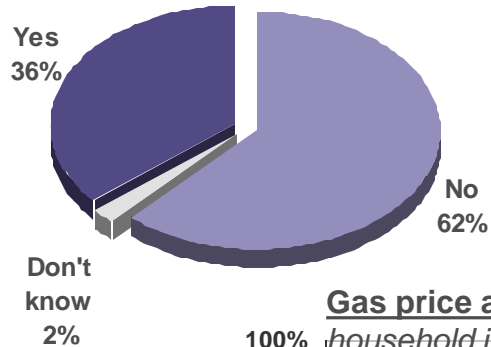
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Base: All respondents

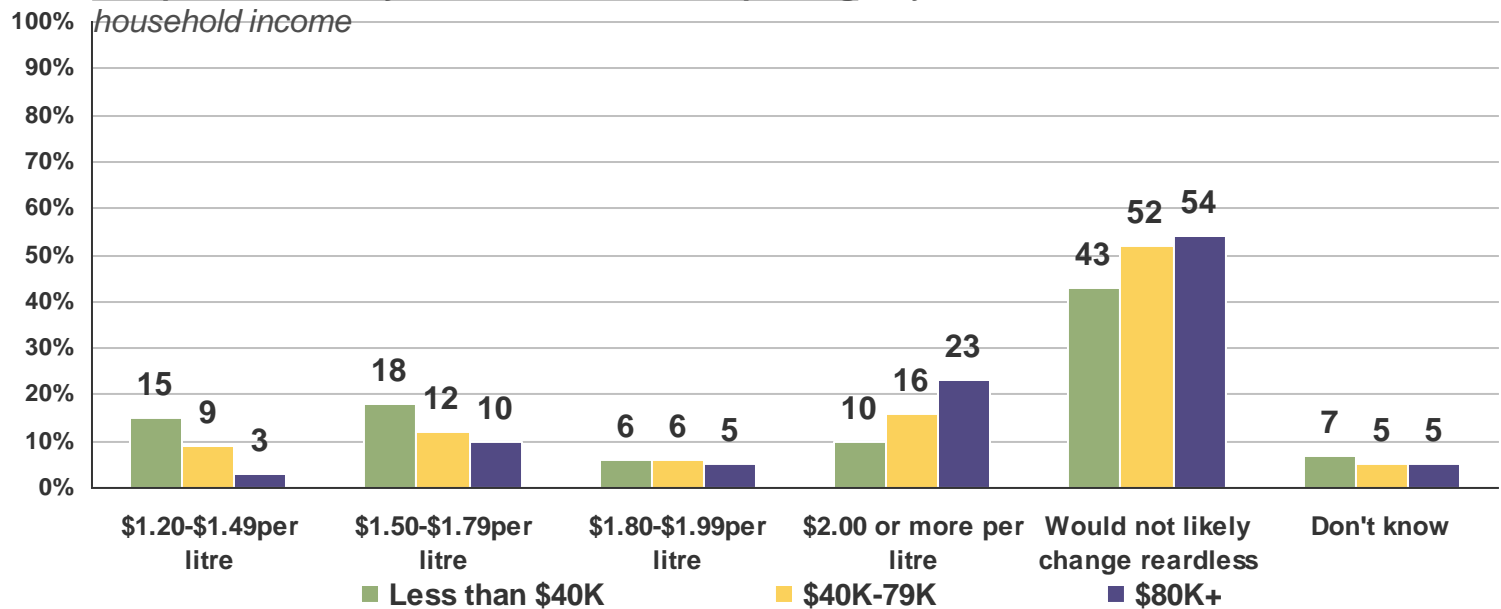


# The less affluent are more likely to consider carpooling at lower gas price points

## Are carpooling because of gas prices



## Gas price at which you would consider carpooling – by household income

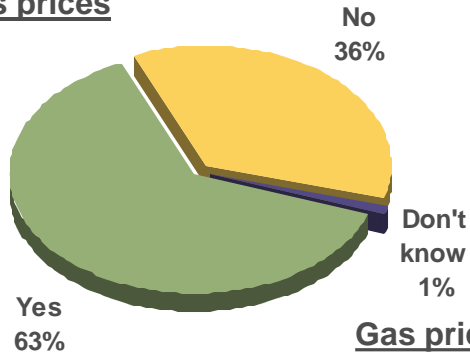


Q7. Now, I'm going to read you a list of some things that consumers have done in response to rising gas prices. I'd like you to tell me if this is something that you, or a member of your household, have already done or are considering doing. If not, I would like to know whether this is something you would be likely to do if the price of gasoline rose to a particular level.

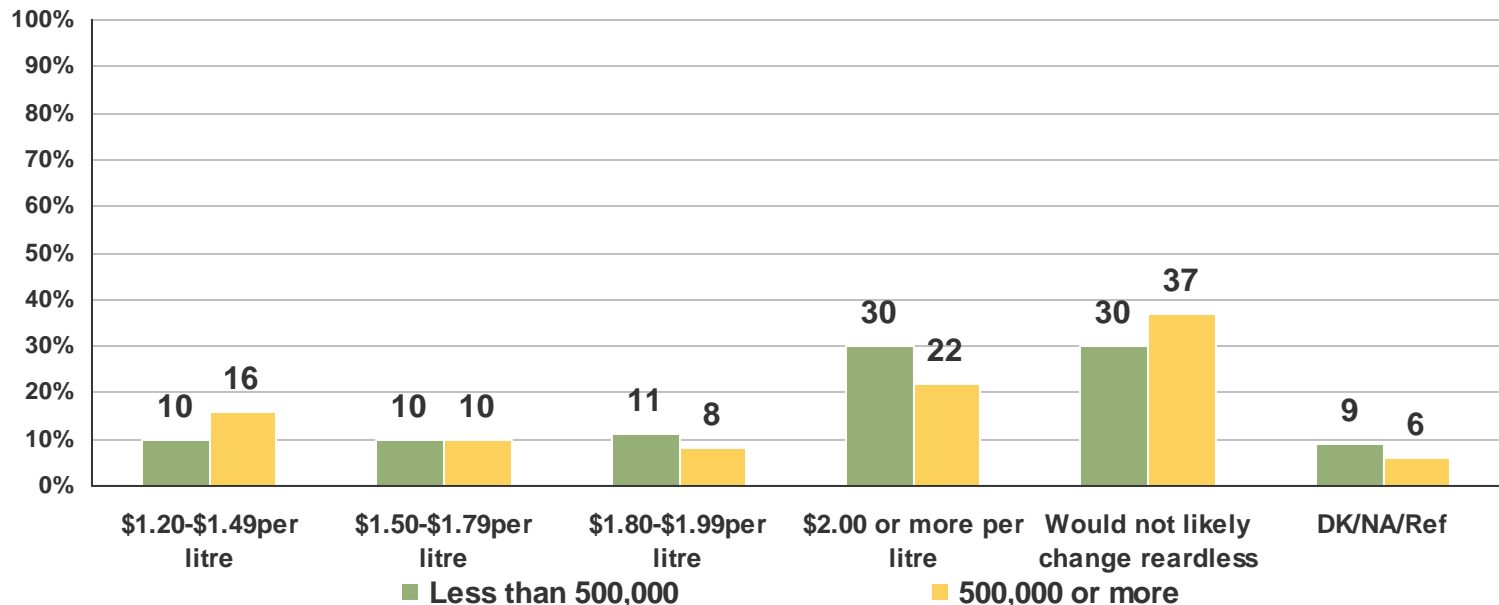
Base: All respondents

# Community size does not seem to impact the decision to purchase a more fuel-efficient vehicle

## Have purchased a more fuel-efficient vehicle because of gas prices



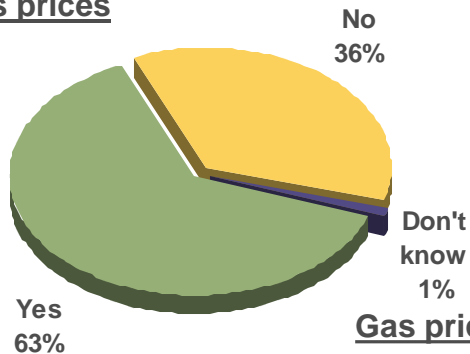
## Gas price at which you would purchase a more fuel-efficient vehicle – by community size



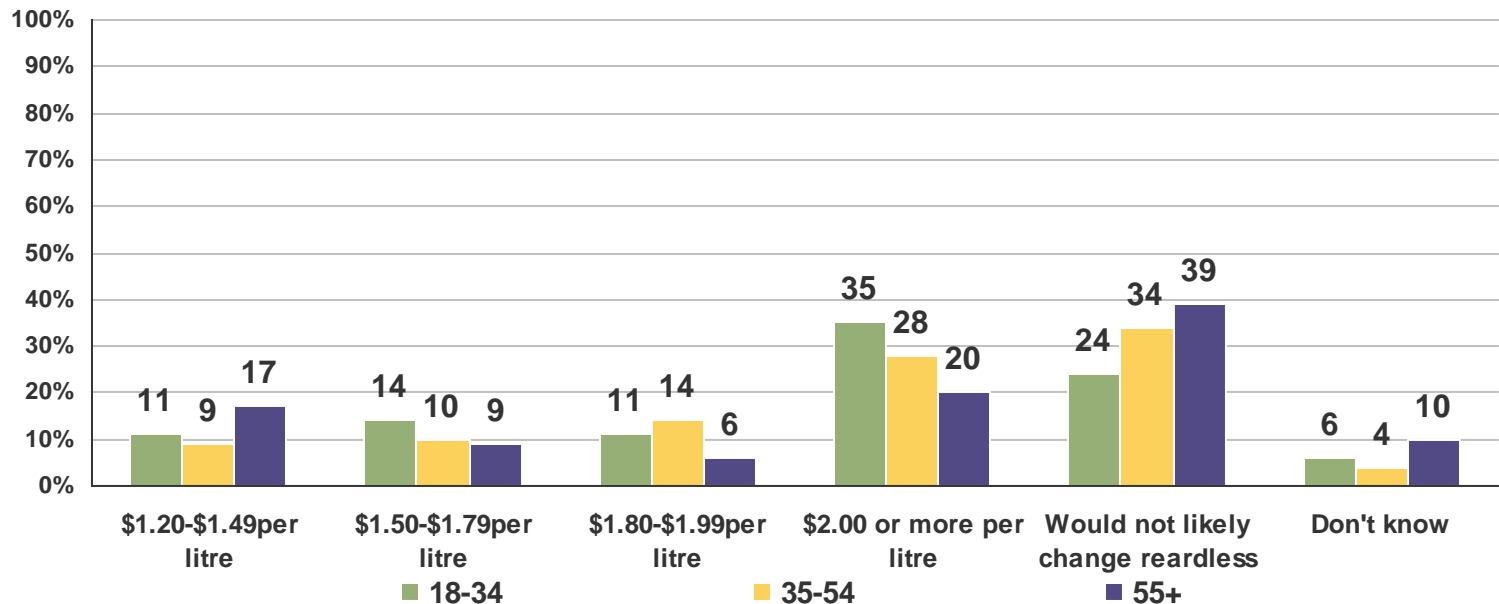
Q7. Now, I'm going to read you a list of some things that consumers have done in response to rising gas prices. I'd like you to tell me if this is something that you, or a member of your household, have already done or are considering doing. If not, I would like to know whether this is something you would be likely to do if the price of gasoline rose to a particular level.  
Base: Among those respondents who have at least one car in the household

# Those aged 18-34 are more likely to consider a more fuel-efficient vehicle

## Have purchased a more fuel-efficient vehicle because of gas prices



## Gas price at which you would purchase a more fuel-efficient vehicle – by age group

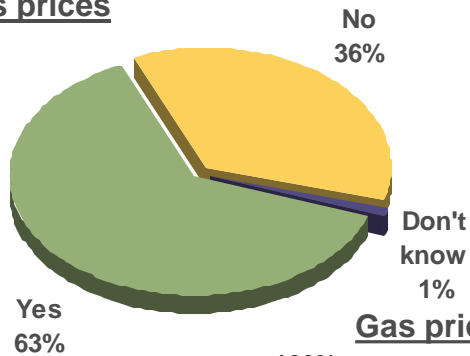


Q7. Now, I'm going to read you a list of some things that consumers have done in response to rising gas prices. I'd like you to tell me if this is something that you, or a member of your household, have already done or are considering doing. If not, I would like to know whether this is something you would be likely to do if the price of gasoline rose to a particular level.

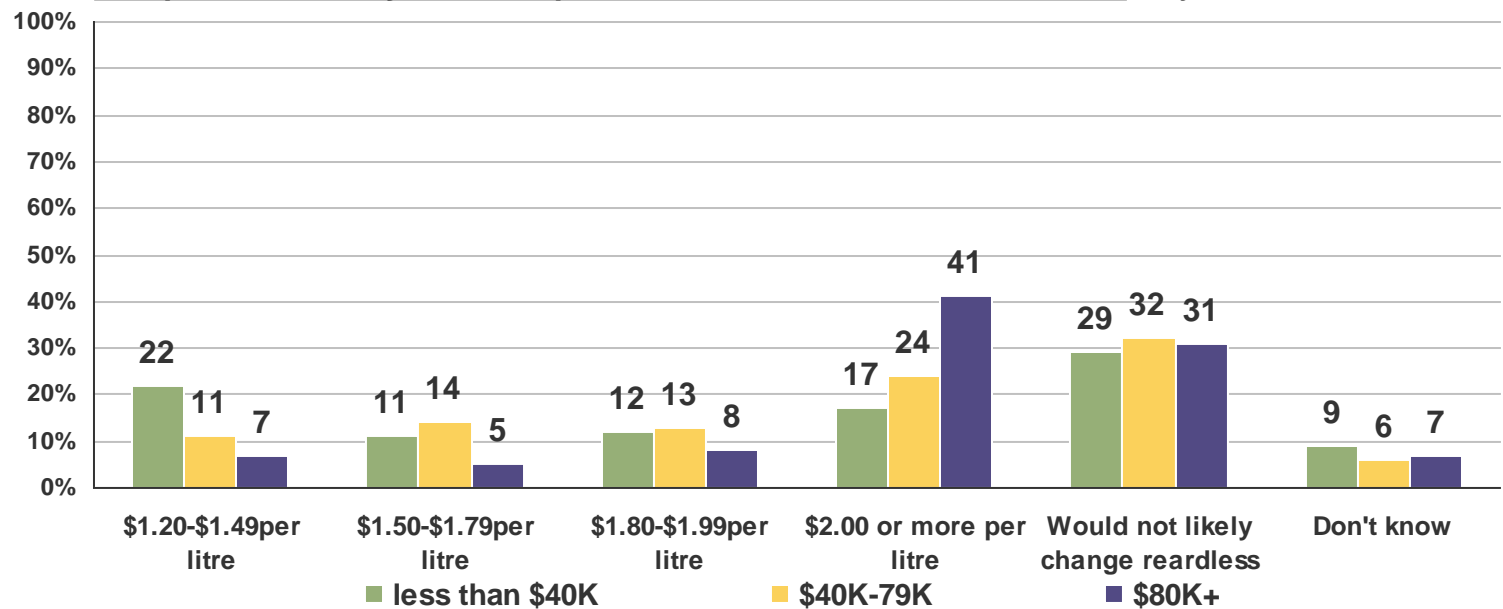
Base: All respondents

# The less affluent are more likely to purchase a more fuel-efficient vehicle at lower gas prices

## Have purchased a more fuel-efficient vehicle because of gas prices



## Gas price at which you would purchase a more fuel-efficient vehicle – by household income

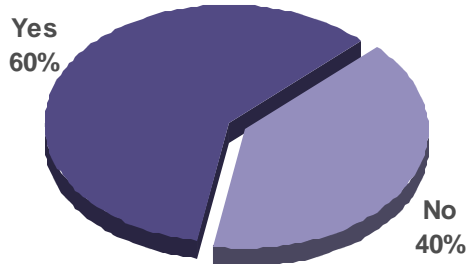


Q7. Now, I'm going to read you a list of some things that consumers have done in response to rising gas prices. I'd like you to tell me if this is something that you, or a member of your household, have already done or are considering doing. If not, I would like to know whether this is something you would be likely to do if the price of gasoline rose to a particular level.

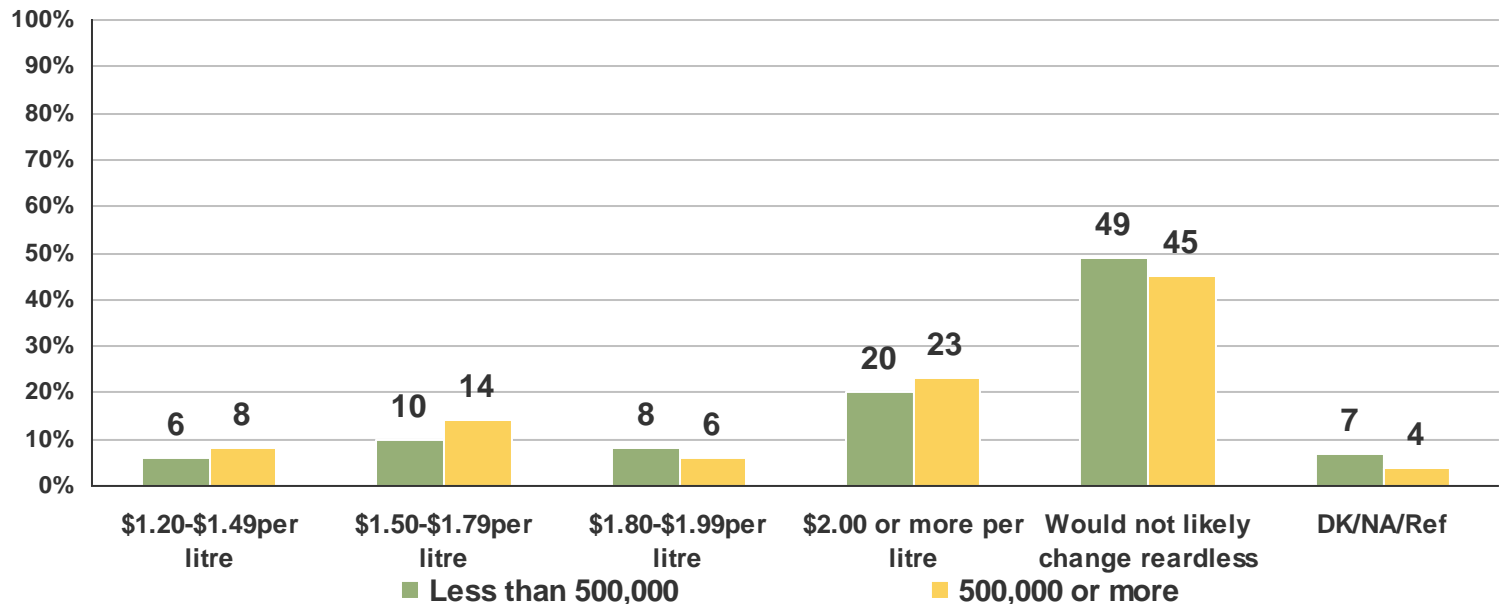
Base: All respondents

# Residents of larger communities are a little more likely to walk or bike more instead of driving

## Are walking or biking more instead of driving because of gas prices



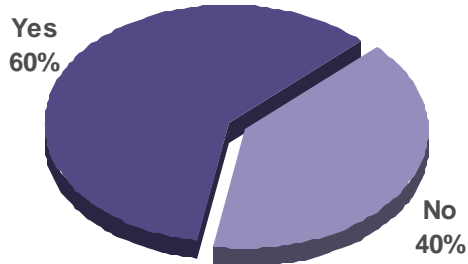
## Gas price at which you would walk or bike more instead of driving – by community size



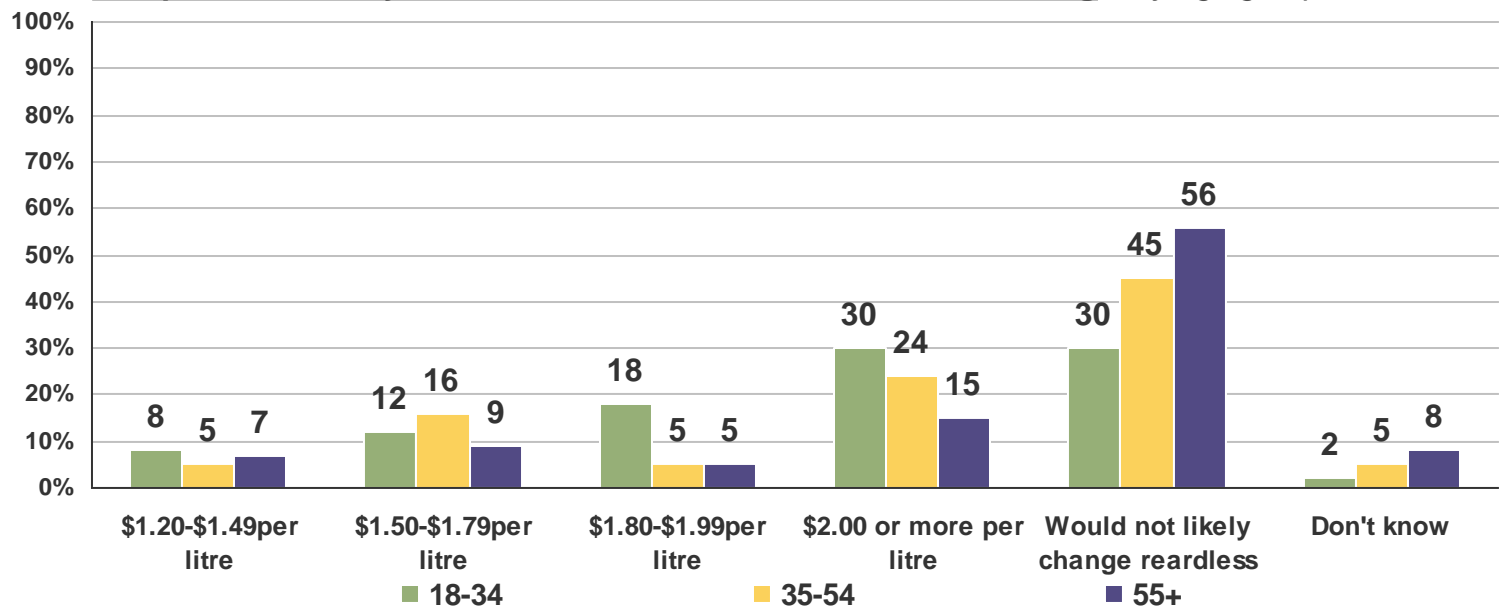
Q7. Now, I'm going to read you a list of some things that consumers have done in response to rising gas prices. I'd like you to tell me if this is something that you, or a member of your household, have already done or are considering doing. If not, I would like to know whether this is something you would be likely to do if the price of gasoline rose to a particular level.  
Base: Among those respondents who have at least one car in the household

# Those aged 18-34 are a little more likely to walk or bike more instead of driving

## Are walking or biking more instead of driving because of gas prices



## Gas price at which you would walk or bike more instead of driving – by age group

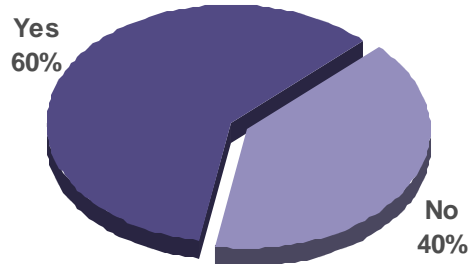


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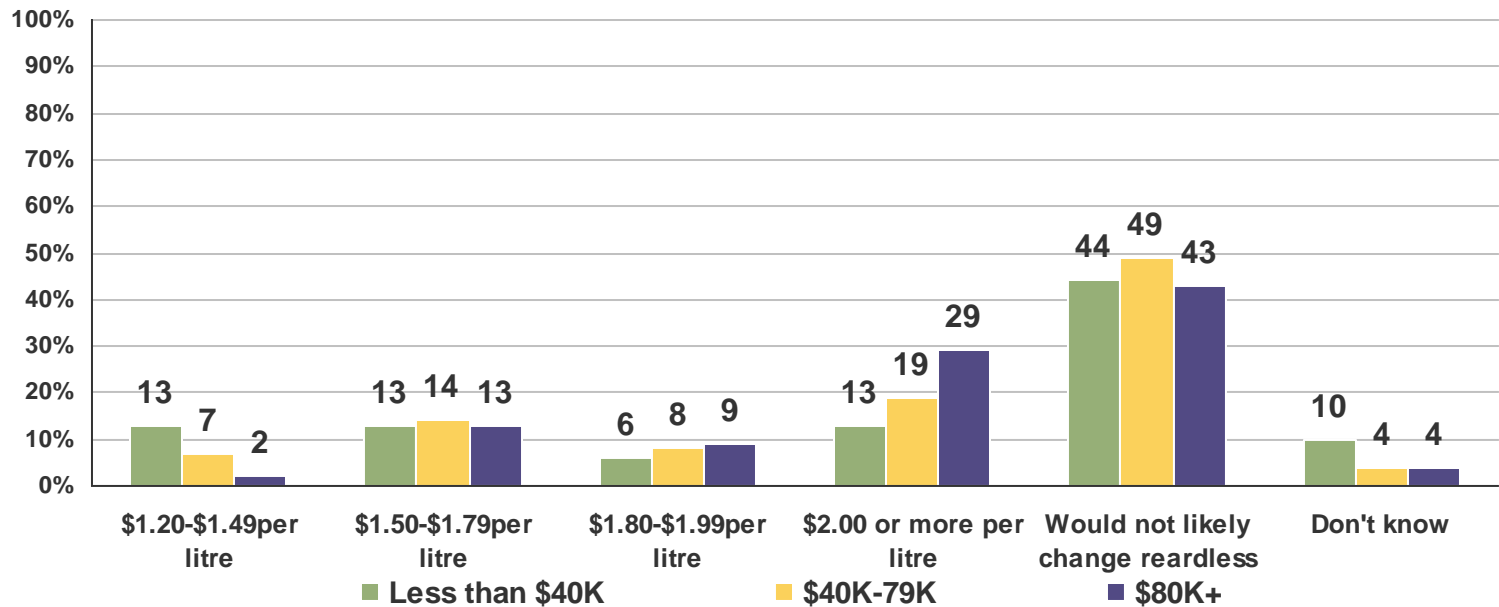
Base: All respondents

# The more affluent are a little more likely to consider walking or biking if gas prices hit \$2 or more a litre

## Walking or biking more instead of driving because of gas prices



## Gas price at which you would walk or bike more instead of driving – by household income

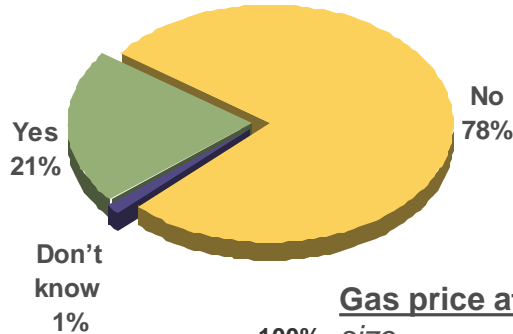


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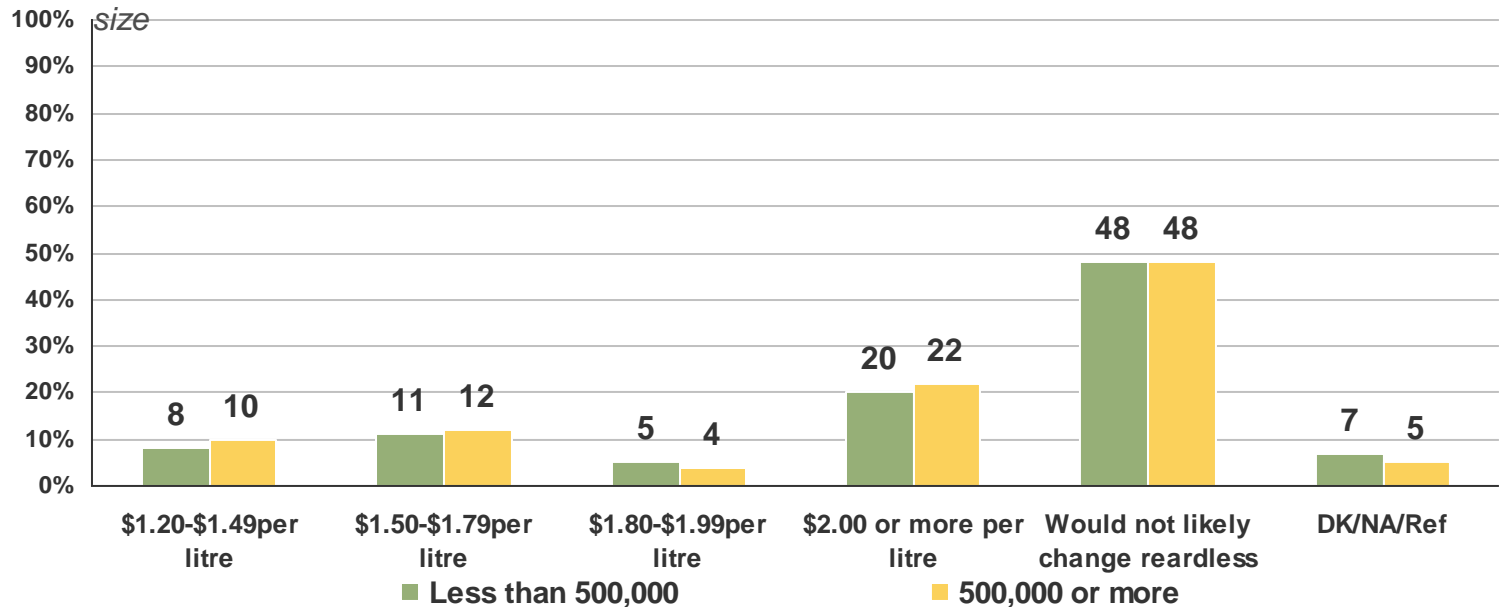
Base: All respondents

# Community size does not seem to impact the decision to reduce the number of vehicles in the household

## Have reduced the number of vehicles in the household because of gas prices



## Gas price at which you would reduce the number of vehicles in household – by community size

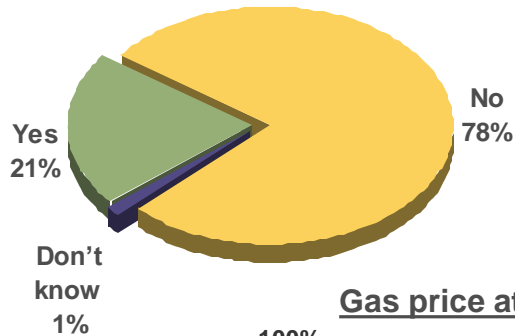


Q7. Now, I'm going to read you a list of some things that consumers have done in response to rising gas prices. I'd like you to tell me if this is something that you, or a member of your household, have already done or are considering doing. If not, I would like to know whether this is something you would be likely to do if the price of gasoline rose to a particular level.  
Base: Among those respondents who have at least one car in the household

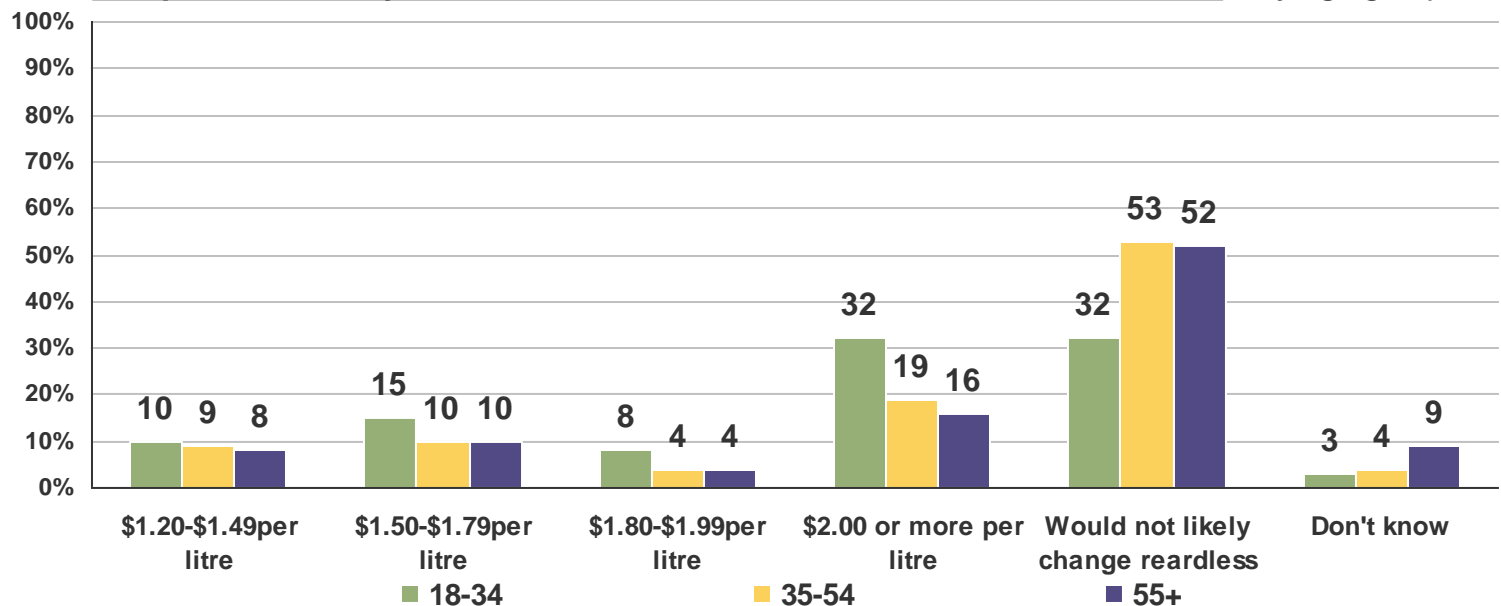


# Those aged 18-34 are more likely to consider downsizing the number of vehicles in the household in response to rising gas prices

## Have reduced the number of vehicles in the household because of gas prices



## Gas price at which you would reduce the number of vehicles in household – by age group

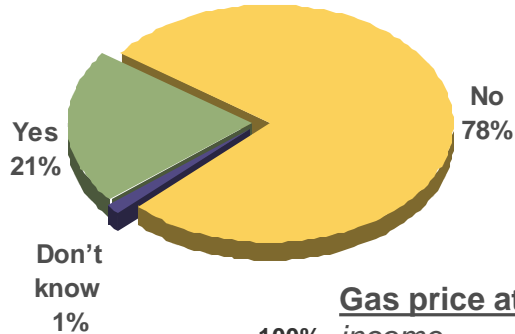


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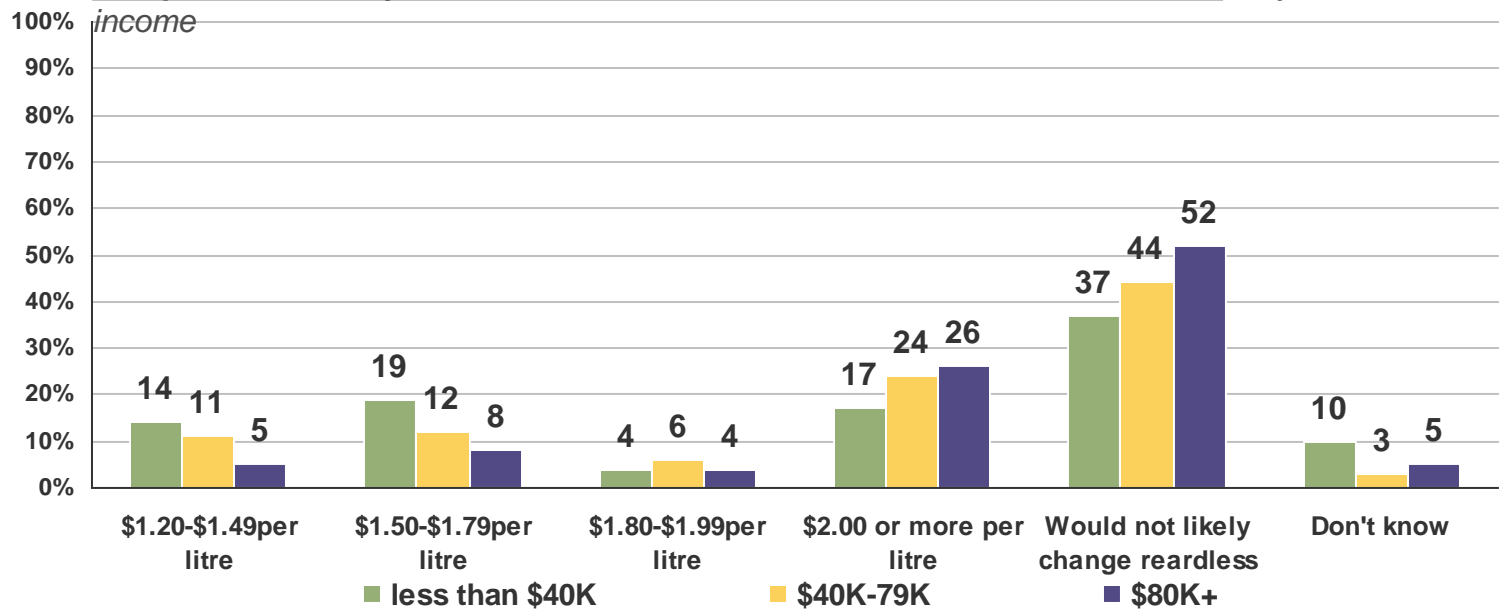
Base: All respondents

# The less affluent are more likely reduce the number of vehicles in their household at lower gas prices

## Have reduced the number of vehicles in the household because of gas prices



## Gas price at which you would reduce the number of vehicles in household – by household income

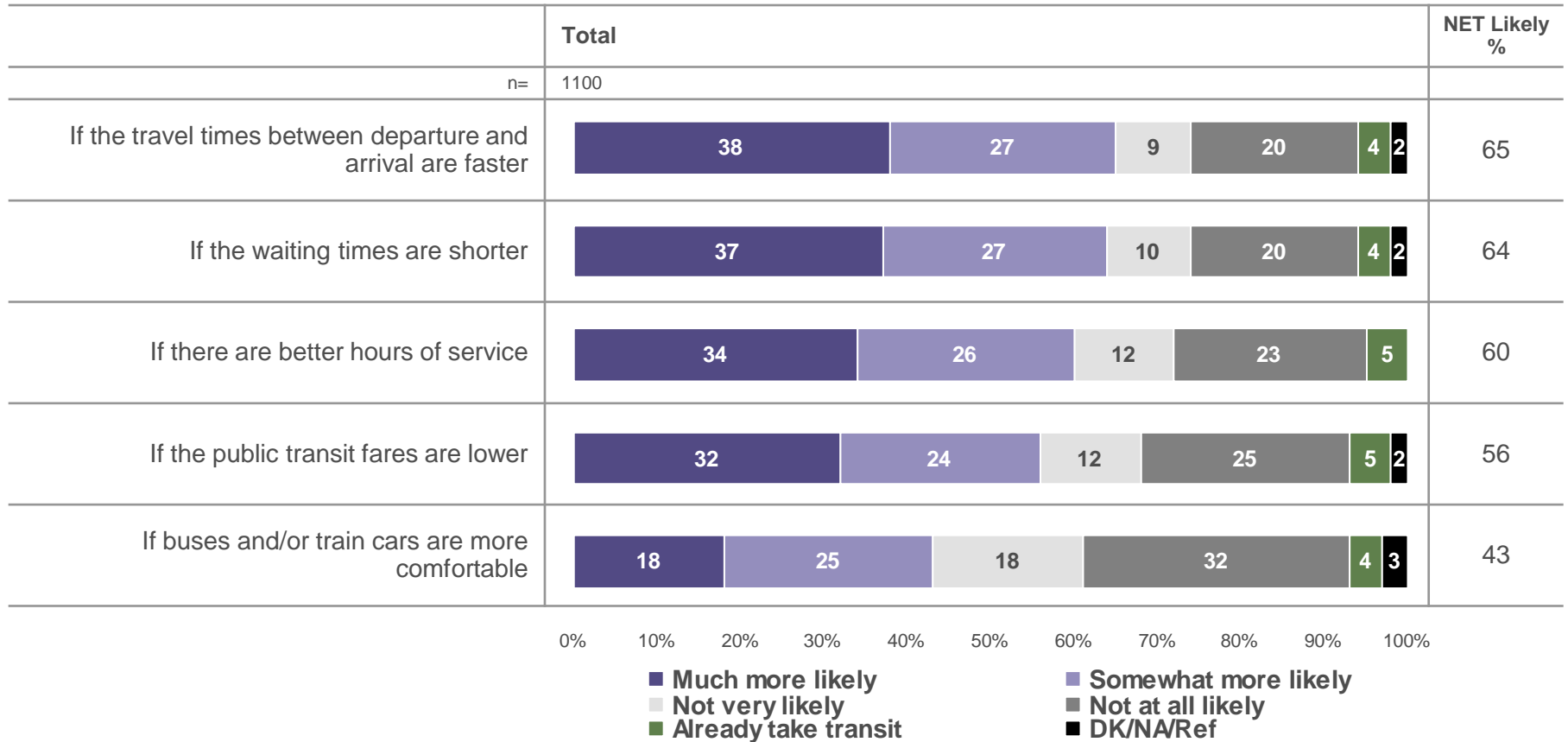


Q7. Now, I'm going to read you a list of some things that consumers have done in response to rising gas prices. I'd like you to tell me if this is something that you, or a member of your household, have already done or are considering doing. If not, I would like to know whether this is something you would be likely to do if the price of gasoline rose to a particular level.

Base: All respondents

# Faster point to point service and shorter wait times would motivate most people to switch to public transit

## Reaction to improvements to transit



Q8. Now I will read you several statements illustrating potential improvements that could be made to the public transit system in your community. For each of the statements please tell me whether you would be much more likely, somewhat more likely, not very likely, or not at all likely to think about taking public transit if this initiative was implemented. I would be much more likely, somewhat more likely, not very likely, not at all likely to take public transit on a regular basis if...

Base: All respondents

# Travel and wait times are the main hurdles keeping people in all regions of the country from switching to public transit

## % Likely

Reaction to improvements to transit		Region				Community Size		
		Atlantic Cities	Quebec Cities	Ontario Cities	Western Cities	100-499k	500k+	
<b>TOTAL</b>	n=	1100	41 <sup>c</sup>	231	530	298	500	600
		%	%	%	%	%	%	%
If the travel times between departure and arrival are faster		65	68	65	64	65	62	67
If the waiting times are shorter		64	68	65	63	65	59	69
If there are better hours of service		60	71	65	57	59	59	61
If the public transit fares are lower		56	66	58	56	55	53	59
If buses and/or train cars are more comfortable		43	46	46	43	39	39	46

Q8. Now I will read you several statements illustrating potential improvements that could be made to the public transit system in your community. For each of the statements please tell me whether you would be much more likely, somewhat more likely, not very likely, or not at all likely to think about taking public transit if this initiative was implemented. I would be much more likely, somewhat more likely, not very likely, not at all likely to take public transit on a regular basis if...

Base: All respondents

# Those who are older and the more affluent are somewhat less likely to consider public transit as an option, irrespective of improvements

*% Likely*

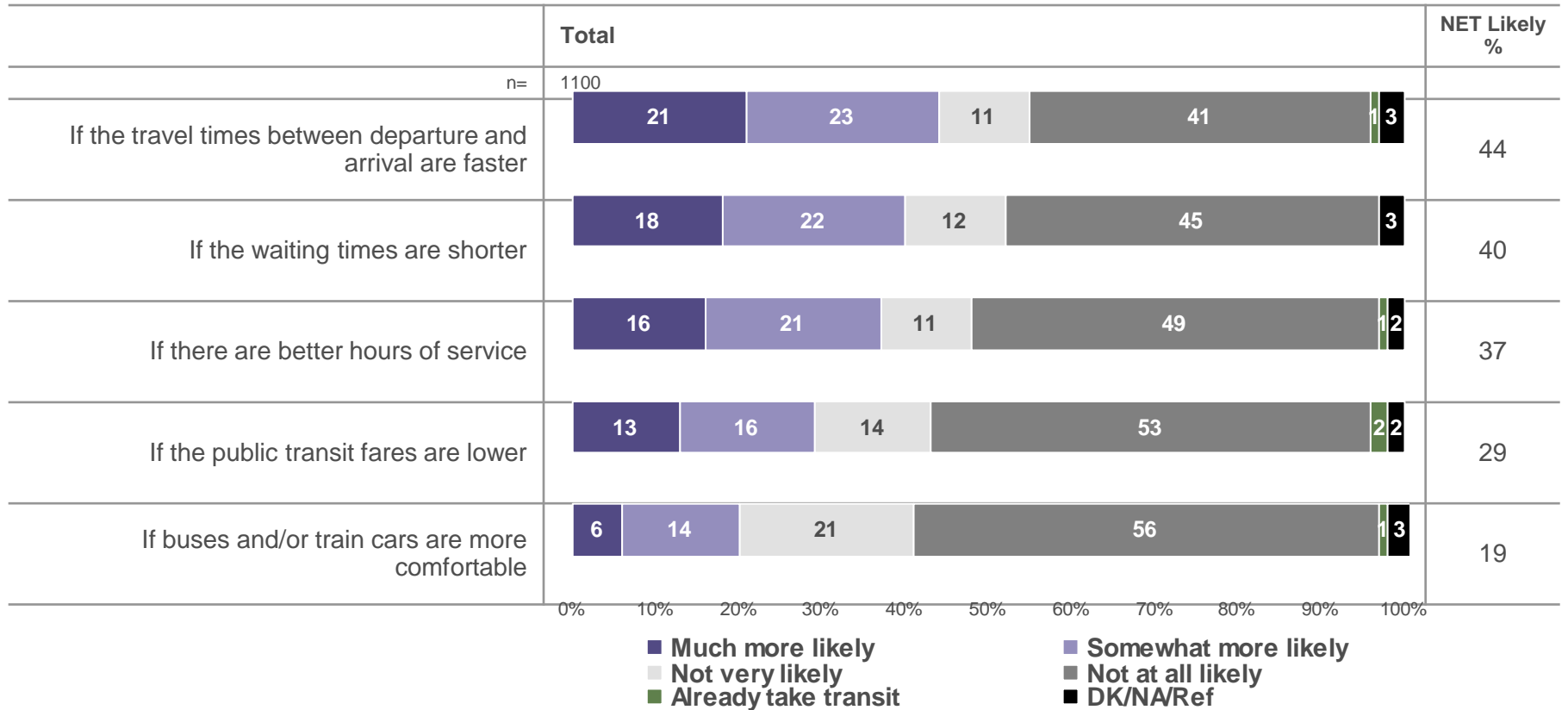
Reaction to improvements to transit <i>TOTAL</i>	Total	Age			Household Income		
		18-34	35-54	55+	Less than \$40K	\$40K-\$79K	\$80K+
n=	1100	232	443	407	276	330	331
	%	%	%	%	%	%	%
If the travel times between departure and arrival are faster	65	74	69	55	66	69	62
If the waiting times are shorter	64	77	68	53	64	70	59
If there are better hours of service	60	71	63	50	63	68	50
If the public transit fares are lower	56	67	57	49	70	60	44
If buses and/or train cars are more comfortable	43	51	44	36	55	45	35

Q8. Now I will read you several statements illustrating potential improvements that could be made to the public transit system in your community. For each of the statements please tell me whether you would be much more likely, somewhat more likely, not very likely, or not at all likely to think about taking public transit if this initiative was implemented. I would be much more likely, somewhat more likely, not very likely, not at all likely to take public transit on a regular basis if...

Base: All respondents

# Among that group of people who said they would be unlikely to take public transit regardless of the price of gas, improvements to travel/wait times would be a motivator to consider making the switch

**Reaction to improvements to transit** (among those who would not change due to higher gas prices)

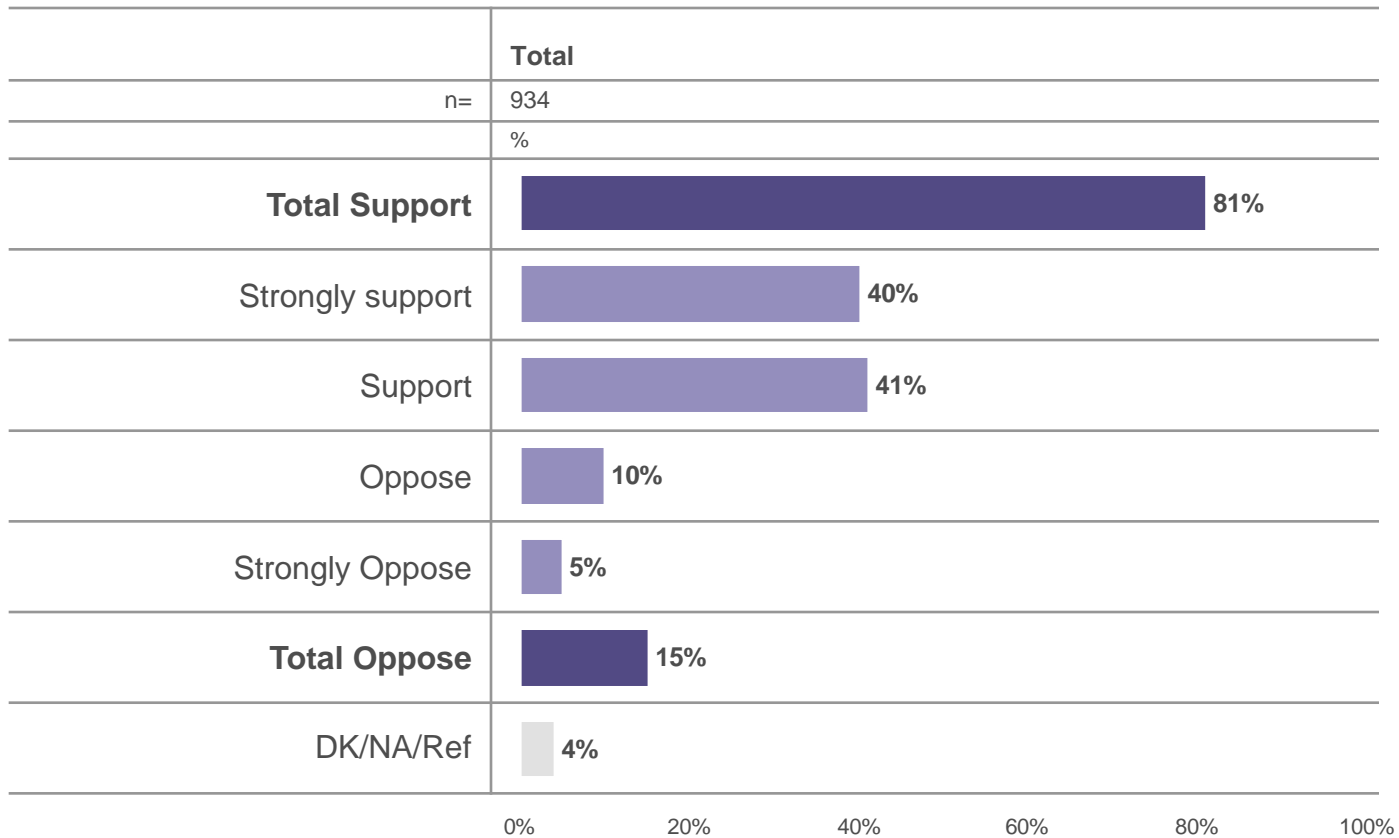


Q8. Now I will read you several statements illustrating potential improvements that could be made to the public transit system in your community. For each of the statements please tell me whether you would be much more likely, somewhat more likely, not very likely, or not at all likely to think about taking public transit if this initiative was implemented. I would be much more likely, somewhat more likely, not very likely, not at all likely to take public transit on a regular basis if...

Base: All respondents

# Eight-in-ten support the idea of dedicating an additional share of federal gas tax revenues to public transit

## Support/Opposition to Increased Share of Federal Gas Taxes Toward Public Transit



Q9. Next year the federal government will collect about 5 billion a year in taxes at the gas pump. The government will invest 40 percent of these revenues to build and repair municipal infrastructure. Some say the government should dedicate another 10 percent of federal gas taxes to a plan that reduces the number of cars and trucks on the road by improving public transit. Would you strongly support, support, oppose or strongly oppose this possible initiative?

Base: Total sample

# This support is evident across all regions and community sizes

<u>Support/Opposition to Increased Share of Federal Gas Taxes on Public Transit</u> <b>TOTAL</b>	Total	Region				Community Size	
		Atlantic Cities	Quebec Cities	Ontario Cities	Western Cities	100-499k	500k+
n=	934	31 <sup>c</sup>	231	440	232	500	600
	%	%	%	%	%	%	%
<b>Total Support</b>	<b>81</b>	<b>94</b>	<b>87</b>	<b>80</b>	<b>75</b>	<b>78</b>	<b>84</b>
Strongly support	40	55	44	39	34	38	42
Support	41	39	42	41	41	40	42
Oppose	10	3	7	10	14	11	10
Strongly Oppose	5	-	4	5	6	6	3
<b>Total Oppose</b>	<b>15</b>	<b>3</b>	<b>12</b>	<b>15</b>	<b>19</b>	<b>17</b>	<b>13</b>
DK/NA/Ref	4	3	2	5	5	5	3

Q9. Next year the federal government will collect about 5 billion a year in taxes at the gas pump. The government will invest 40 percent of these revenues to build and repair municipal infrastructure. Some say the government should dedicate another 10 percent of federal gas taxes to a plan that reduces the number of cars and trucks on the road by improving public transit. Would you strongly support, support, oppose or strongly oppose this possible initiative?

Base: Total sample



# Those under the age of 54 and with higher incomes are the most supportive of directing a higher share of the federal gas taxes toward public transit improvements

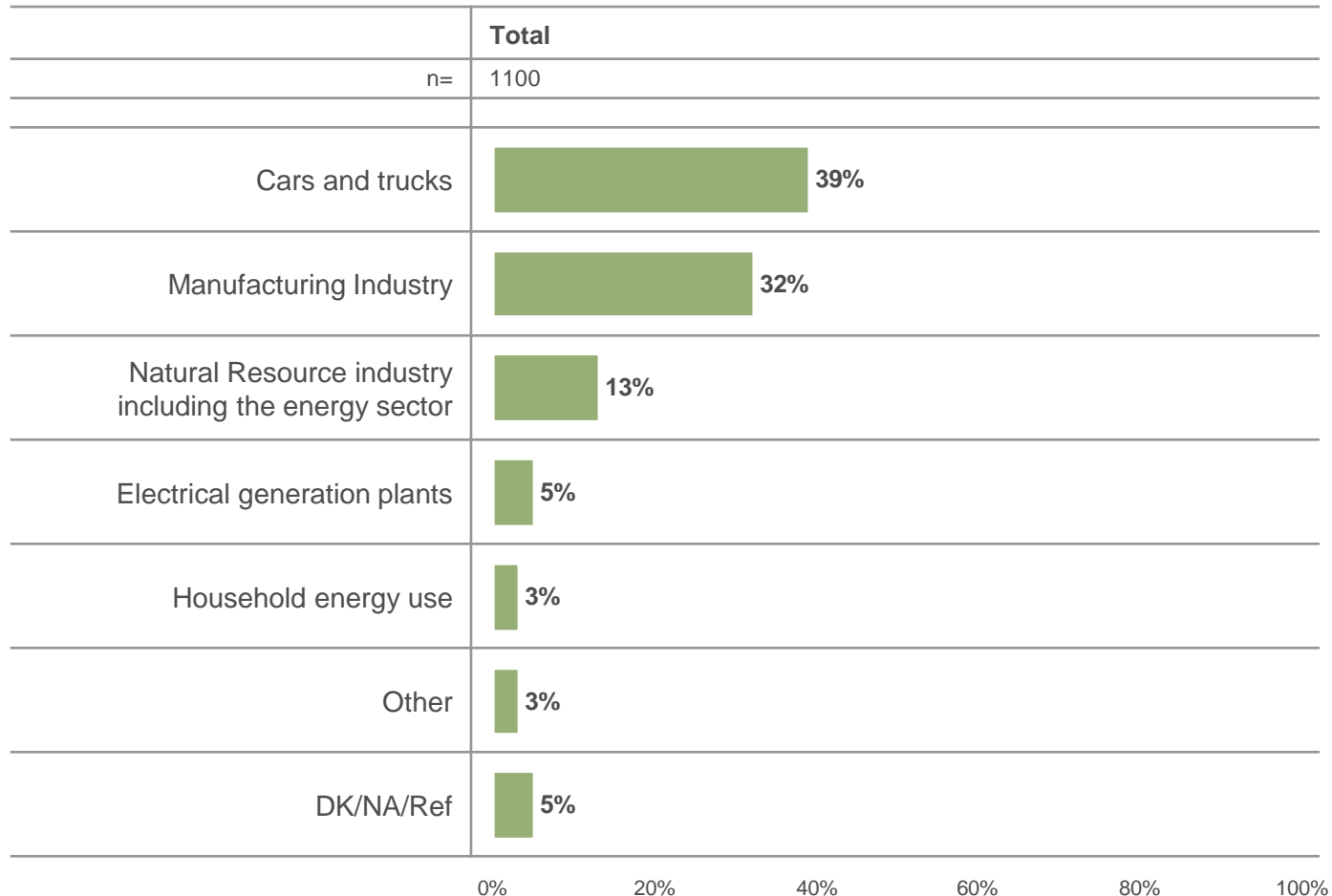
<u>Support/Opposition to Increased Share of Federal Gas Taxes on Public Transit</u> <b>TOTAL</b>	Total	Age			Household Income		
		18-34	35-54	55+	Less than \$40K	\$40K-\$79K	\$80K+
n=	934	200	366	351	234	278	283
	%	%	%	%	%	%	%
<b>Total Support</b>	<b>81</b>	<b>90</b>	<b>82</b>	<b>75</b>	<b>78</b>	<b>84</b>	<b>85</b>
Strongly support	40	43	41	37	40	41	44
Support	41	47	41	38	38	43	41
Oppose	10	5	10	13	12	9	10
Strongly Oppose	5	3	5	6	4	4	4
<b>Total Oppose</b>	<b>15</b>	<b>8</b>	<b>15</b>	<b>19</b>	<b>16</b>	<b>13</b>	<b>13</b>
DK/NA/Ref	4	3	3	6	6	3	2

Q9. Next year the federal government will collect about 5 billion a year in taxes at the gas pump. The government will invest 40 percent of these revenues to build and repair municipal infrastructure. Some say the government should dedicate another 10 percent of federal gas taxes to a plan that reduces the number of cars and trucks on the road by improving public transit. Would you strongly support, support, oppose or strongly oppose this possible initiative?

Base: Total sample

# Canadians believe cars and trucks are the largest source of greenhouse emissions

## Sources of greenhouse gas emissions



Q10. In your opinion, which of the following is the single largest source of greenhouse gas emissions in Canada

Base: All respondents

# This is true in all regions and communities

Sources of greenhouse gas emissions	Total	Region				Community Size	
		Atlantic Cities	Quebec Cities	Ontario Cities	Western Cities	100-499k	500k+
<b>TOTAL</b>	n= 1100	41 <sup>c</sup>	231	530	298	500	600
	%	%	%	%	%	%	%
Cars and trucks	39	37	43	39	37	39	40
Manufacturing Industry	32	44	33	34	26	36	28
Natural Resource industry including the energy sector	13	-	13	12	18	11	15
Electrical generation plants	5	5	3	5	5	4	5
Household energy use	3	2	1	4	4	3	4
Other	3	2	4	3	4	2	4
DK/NA/Ref	5	10	3	5	7	5	5

Q10. In your opinion, which of the following is the single largest source of greenhouse gas emissions in Canada  
Base: All respondents

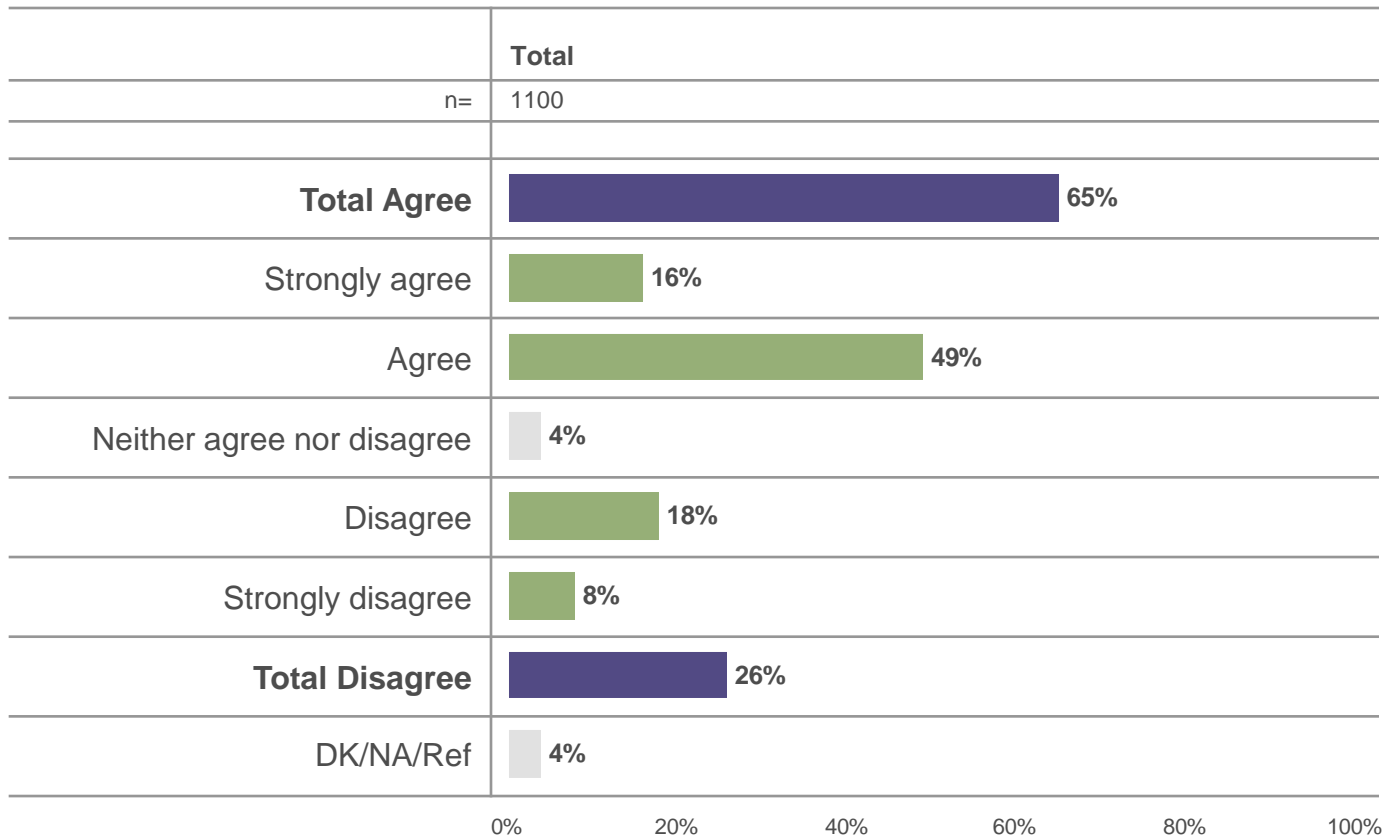
# And, this view is shared across all ages and income groups

Sources of greenhouse gas emissions	Total	Age			Household Income			
		18-34	35-54	55+	Less than \$40K	\$40K-\$79K	\$80K+	
<b>TOTAL</b>								
	n=	1100	232	443	407	276	330	331
		%	%	%	%	%	%	%
Cars and trucks	39	39	40	38	41	41	40	
Manufacturing Industry	32	33	34	29	32	36	30	
Household energy use	3	5	3	2	3	2	3	
Electrical generation plants	5	4	3	7	3	5	5	
Natural Resource industry including the energy sector	13	13	14	12	10	12	16	
Other	3	2	2	6	5	1	2	
DK/NA/Ref	5	3	4	7	6	3	4	

Q10. In your opinion, which of the following is the single largest source of greenhouse gas emissions in Canada  
Base: All respondents

# Most agree that current strategies and proposals don't do enough to help average Canadians reduce greenhouse gas emissions

## Neither the federal government strategy nor the opposition plan does enough to help the average Canadian



Q11. The federal government's current environmental strategy focuses on a variety of measures to reduce greenhouse gas emissions produced by industry. The official opposition has proposed a plan that would lower income taxes and impose new taxes on greenhouse gas emissions. Some people believe that neither strategy does enough to help the average Canadian reduce their greenhouse emissions in their own day to day lives. Do you strongly agree, agree, neither agree nor disagree (volunteer), disagree, or strongly disagree with this point of view?

Base: All respondents

# This view is held by across all regions and community sizes

Neither the federal government strategy nor the opposition plan does enough to help the average Canadian <b>TOTAL</b>	Total	Region				Community Size	
		Atlantic Cities	Quebec Cities	Ontario Cities	Western Cities	100-499k	500k+
n=	1100	41 <sup>c</sup>	231	530	298	500	600
	%	%	%	%	%	%	%
<b>Total Agree</b>	<b>65</b>	<b>71</b>	<b>67</b>	<b>67</b>	<b>61</b>	<b>63</b>	<b>68</b>
Strongly agree	16	15	19	15	15	13	19
Agree	49	56	47	52	46	50	49
Neither agree nor disagree	4	5	4	4	5	5	4
Disagree	18	15	22	15	22	20	17
Strongly disagree	8	7	6	9	6	8	7
<b>Total Disagree</b>	<b>26</b>	<b>22</b>	<b>28</b>	<b>25</b>	<b>28</b>	<b>29</b>	<b>24</b>
DK/NA/Ref	4	2	1	5	5	4	4

Q11. The federal government's current environmental strategy focuses on a variety of measures to reduce greenhouse gas emissions produced by industry. The official opposition has proposed a plan that would lower income taxes and impose new taxes on greenhouse gas emissions. Some people believe that neither strategy does enough to help the average Canadian reduce their greenhouse emissions in their own day to day lives. Do you strongly agree, agree, neither agree nor disagree (volunteer), disagree, or strongly disagree with this point of view?

Base: All respondents

# Older residents are modestly less likely to hold this view

Neither the federal government strategy nor the opposition plan does enough to help the average Canadian <b>TOTAL</b>	Total	Age			Household Income		
		18-34	35-54	55+	Less than \$40K	\$40K-\$79K	\$80K+
n=	1100	232	443	407	276	330	331
	%	%	%	%	%	%	%
<b>Total Agree</b>	<b>65</b>	<b>73</b>	<b>68</b>	<b>59</b>	<b>70</b>	<b>65</b>	<b>67</b>
Strongly agree	16	9	20	16	17	13	19
Agree	49	64	48	43	53	52	48
Neither agree nor disagree	4	4	4	5	4	4	3
Disagree	18	16	15	24	16	20	18
Strongly disagree	8	5	8	9	6	7	8
<b>Total Disagree</b>	<b>26</b>	<b>21</b>	<b>23</b>	<b>33</b>	<b>22</b>	<b>27</b>	<b>26</b>
DK/NA/Ref	4	3	5	3	4	4	4

Q11. The federal government's current environmental strategy focuses on a variety of measures to reduce greenhouse gas emissions produced by industry. The official opposition has proposed a plan that would lower income taxes and impose new taxes on greenhouse gas emissions. Some people believe that neither strategy does enough to help the average Canadian reduce their greenhouse emissions in their own day to day lives. Do you strongly agree, agree, neither agree nor disagree (volunteer), disagree, or strongly disagree with this point of view?

Base: All respondents



The Strategic Counsel

Gregg, Kelly, Sullivan & Woolstencroft:  
The Strategic Counsel

[www.thestrategiccounsel.com](http://www.thestrategiccounsel.com)

21 St. Clair Avenue East  
Suite 1100  
Toronto, Ontario  
M4T 1L9  
Tel 416 975-4465  
Fax 416 975-1883

60 George Street  
Suite 205  
Ottawa, Ontario  
K1N 1J4  
Tel 613 236-0296  
Fax 613 236-1290



## Canadian Perceptions Toward the “New Realities of High Gas Prices”

## Implications for Public Transit and Environment Policy

August, 2008