

# BANFF INTERCEPT- LOT/ CAR FREE NATIONAL POLL TOP- LINE- SUMMARY

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## **1. Summary**

Advanis, a national polling firm was contracted to carry out Canada-wide polling in support of the three Liricon initiatives. The polling required two separate forms. Banff residents were contacted by telephone, while the rest of the nation was contacted through a hybrid of telephone and online polling.

### **Recent Experience in Banff**

Data highlights the prominence of Banff (the park and town) in the cognition and travel intention of Canadians. As one of thirty-nine National Parks in Canada, it holds high prominence.

### **Awareness of Crowding in Banff**

Tables 3 and 4 suggest that a considerable proportion of Canadians, and especially Albertans, hold the perception that Banff National Park (BNP) is overcrowded compared to others. Additionally, Albertans more so than other Canadians, have made the decision to avoid BNP during peak periods because of a perception of overcrowding.

### **Canadians Views of Banff National Park**

BNP is held in high regard, but there are differences among *Banff Residents*, *Albertans* and *Rest of Canada* respondents on key issues such as: BNP's role as a tourism destination, that it needs to be accessible to all, that it exists as an important part of Canadian heritage, and decreasing vehicle impact on wildlife as a priority.

### **Intercept Parking Lot**

There is strong support for implementing an intercept parking lot in Banff that is free of charge and located five-minutes from the downtown core. The most pronounced benefits of this initiative are reported to be a car-free, pedestrian-friendly downtown core; that it will be free, and be five minutes from the core.

### **Aerial Transit**

All three groups support aerial transit, or a gondola, rising from the base of the Railway Lands in Banff up to Mount Norquay. However, the *Rest of Canada* supports this significantly more than *Banff Residents*. All three groups see benefit in an initiative to focus on reducing vehicle traffic and opening up a wildlife corridor.

### **Passenger Rail**

There is strong support across the board for a dedicated passenger rail line from Calgary airport to Banff.

## 2. Methodology

The survey tool was developed by Planvision Consulting Ltd. and then modified by Advanis to suit telephone and telephone/online polling.

Sampling for the *Banff Residents* study aged 18 and older were polled. The sample size of 400 yields a margin of error of +/- 4.9% at 95% confidence level. If we apply the small population correctly (given Banff's 18+ population of 6,820 in 2016), the margin of error is +/- 4.8% at 95%.

Sampling for the *Albertans* portion of the study included people aged 18 and older. The sample size of 1308 yields a margin of error of +/- 2.7% at 95% confidence level.

Sampling for the *Rest of Canada* portion of the study included people from the other 9 provinces, aged 18 and older. The sample size of 1401 yields a margin of error of +/- 2.6% at 95% confidence level.

Data was collected in two ways: Banff residents randomly surveyed via telephone to both landline and wireless numbers; Canadians in the rest of Alberta, and the other nine provinces randomly recruited via interactive voice response (IVR) calls to wireless numbers, and if they agreed to do the survey, were sent a link to an online survey via SMS (text message) that they could complete on their mobile device (89% of completed IVR-SMS-web surveys) or desktop computer (11%).

Data was collected from June 20-July 5, 2019.

Data was weighted to 2016 census proportions for age and sex within Banff and within each province.

### 3. Recent Experience in Banff

Tables 1 and 2 highlight the prominence of Banff (the park and town) in the cognition and travel intention of Canadians. As one of thirty-nine national parks in Canada it holds high prominence.

*When did you last visit Banff?*

**Most Canadians have visited Banff more than five years ago, while most Albertans have visited Banff in the past two years. The survey revealed that one in three Canadians have visited Banff, and all Albertans and one in three Canadians intend to visit Banff in the next two years.**

Weight: used when doing cross-tab by region variable or filtering region and no filters. Upper case indicate a significance at the 95% level which means there is not just a difference, but a *statistical* difference in the propensity of visitation between *Albertan* and the *Rest of Canada* visitation.

Table 1: When did you last visit Banff National Park?			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
(1) In 2019	-*	52%	6%
			C
(2) In 2018	-*	29%	9%
			C
(3) Between 2014 and 2017	-*	13%	20%
			B
(4) 2013 or earlier	-*	3%	29%
			B
(5) I have never visited Banff National Park	-*	2%	35%
			B
<b>Base</b>	0	1371	2377

Table 2: Do you plan to visit Banff in the next two years?			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
(1) Yes	-*	92%	38%
			C
(2) No	-*	3%	27%
			C
(3) Not sure	-*	5%	35%
			B
<b>Base</b>	0	1371	2377

#### 4. Awareness of Crowding in Banff

Tables 3 and 4 suggest that the view of Banff National Park (BNP) as being overcrowded is a perception held by a considerable proportion of Canadians, especially Albertans. Additionally, more than other Canadians, Albertans have decided to avoid BNP during peak periods because of a perception of overcrowding.

*Have you heard or read news media of BNP being overcrowded?*

Table 3 indicates the extent to which Albertans and Canadians have heard of Banff being overcrowded through the media. More than six out of ten *Albertans* have heard of Banff being overcrowded, and 31% of the *Rest of Canada* reported hearing the same.

Table 3: Prior to this survey, had you heard or read news media that Banff National Park is overcrowded?			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
(1) Yes	-*	61%	31%
		C	
(2) No	-*	35%	63%
		B	
(3) Not sure	-*	4%	6%
		B	
Base	0	1371	2377

*Have you ever avoided BNP during peak periods because you thought it would be too crowded?*

Table 4 reports that 65% of *Albertans* have avoided BNP during peak periods because of perceptions of overcrowding. This is also true for a quarter of the *Rest of Canada*. Tables 3 and 4 suggest that the perception of BNP being overcrowded is present in the public domain and further, that people make travel decisions based on that perception.

Table 4: Have you ever avoided visiting Banff National Park during peak periods because it may be overcrowded?			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
(1) Yes	-*	65%	24%
		C	
(2) No	-*	33%	71%
		B	
(3) Not sure	-*	2%	5%
		B	
Base	0	1371	2377

## 5. Canadians Views of Banff National Park

**BNP is held in high regard, but there are differences among *Banff*, *Albertans* and the *Rest of Canada* respondents on key issues such as: BNP's role as a tourism destination, that it needs to be accessible to all, that it exists as an important part of Canadian heritage, and decreasing vehicle impact on wildlife as a priority.**

A series of ten (10) questions were asked to all three groups, *Banff*, *Albertans* and the *Rest of Canada* residents, to better understand their perceptions of BNP. *Albertans* and the *Rest of Canada* believe more so that BNP is an important tourism destination. The *Rest of Canada* agrees most with protecting Banff's natural environment for all time and that it remain open to all Canadians. They show the least agreement with making Banff more pedestrian- friendly and that decreasing vehicle traffic will improve the visitor and resident quality of life respectively. *Albertans* agree the most that it must remain open to all Canadians, and that it is an important tourism destination. *Albertans* agree the least with decreasing vehicle impact on wildlife as a priority and making it more pedestrian- friendly will improve the visitor experience. *Banff* residents agree the most that BNP needs to be protected for all time and the least with making Banff more pedestrian- friendly to enhance the visitor experience.

<b>Table 5: Please indicate the extent to which you agree or disagree with each statement about Banff National Park.</b>			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>(2) Banff's natural environment needs to be protected for all time</b>	73%	78%	86%
			A B
<b>(4) Banff needs to focus on long term sustainability solutions more than ever</b>	64%	64%	75%
			A B
<b>(6) Banff is an important tourism destination for Canadian and international visitors</b>	60%	81%	76%
		A C	A
<b>(8) Banff National Park is important to all Canadians, not just those who live there</b>	58%	78%	78%
		A	A
<b>(9) Decreasing vehicle congestion in Banff National Park will improve resident quality of life</b>	57%	39%	53%
	B		B
<b>(5) It is important that Banff remains accessible to Canadians</b>	56%	87%	82%
		A C	A
<b>(1) Banff represents an important part of Canadian heritage</b>	56%	77%	77%
		A	A
<b>(3) Banff needs to balance human use (visitors) and conservation and ecological integrity</b>	56%	66%	76%
		A	A B
<b>(10) Decreasing vehicle impact on wildlife in Banff needs to be a priority</b>	50%	47%	63%
			A B
<b>(7) Making Banff more pedestrian-friendly will improve the visitor experience</b>	46%	47%	56%
			A B

## 6. Intercept Parking Lot

**There is strong support for implementing an intercept parking lot in Banff that is free of charge and located five-minutes from the downtown core. The most pronounced benefits of this initiative are reported to be the car-free pedestrian-friendly downtown core, and that it will be free and five minutes from the core.**

All regions were asked as to how supportive they are for an intercept parking lot, which was explained in great detail in the survey. All three regions are supportive, but the *Rest of Canada* is the most supportive, followed by *Albertans* and then *Banff* residents.

<b>Table 6: How supportive are you of this initiative: An intercept parking lot at the Banff Train Station?</b>			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>NET Top 2 Strongly/Moderately supportive</b>	78%	88%	92%
		A	A B
<b>NET Bot 2 Weakly/Not at all supportive</b>	19%	10%	5%
	B C	C	
<b>(1) Strongly supportive</b>	55%	60%	69%
			A B
<b>(2) Moderately supportive</b>	23%	28%	23%
		C	
<b>(3) Weakly supportive</b>	11%	5%	3%
	B C		
<b>(4) Not at all supportive</b>	8%	5%	2%
	C	C	
<b>(5) No opinion</b>	3%	2%	3%
<b>Base</b>	400	1371	2376

Furthermore, all three regions see benefits in the intercept lot, with 90% of *Banff* residents, 93% of *Albertans* and 94% of the *Rest of Canada* report seeing benefit in the initiative (not shown). *Banff* residents report the car-free, pedestrian-friendly downtown area as the biggest benefit, followed by free parking that is five minutes from the core. *Albertans* report the biggest benefits as the same as do the *Rest of Canada*. (See Appendix 2 for detailed data tables)



## 7. Aerial Transit

All three groups support aerial transit, or a gondola from the base of the Railway Lands in Banff to Mount Norquay. The *Rest of Canada* supports it significantly more than *Banff Residents*. All three groups see benefit in the initiative, which focuses on reducing vehicle traffic and opening up a wildlife corridor.

*Banff Residents* are considerably less supportive of the implantation of aerial transit or a gondola from the base of the Railway Lands to Norquay Ski and Sightseeing area. The differences among the three groups are also statistically significant. However, it should be noted that six out of ten (62%) *Banff Residents* do support the initiative; which is less than the 81% of *Albertans* and 88% of the *Rest of Canada* that support the initiative.

Table 7: How supportive are you of this initiative: Aerial transit (a gondola) to the Mt. Norquay Ski Area?			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>NET Top 2 Strongly/Moderately supportive</b>	62%	81%	88%
		A	A B
<b>NET Bot 2 Weakly/Not at all supportive</b>	37%	14%	7%
	B C	C	
<b>(1) Strongly supportive</b>	30%	46%	55%
		A	A B
<b>(2) Moderately supportive</b>	31%	35%	32%
<b>(3) Weakly supportive</b>	19%	9%	4%
	B C	C	
<b>(4) Not at all supportive</b>	18%	5%	2%
	B C	C	
<b>(5) No opinion</b>	2%	5%	6%
		A	A
<b>Base</b>	400	1371	2376

A follow-up question was asked whether respondents would still be supportive of the initiative if the gondola could be seen crossing over the TransCanada Highway. Results do not vary considerably from Table 7. *Banff Residents* report 61% supportive and 35% non-supportive; *Albertans* are 79% supportive and 13% non-supportive; and the *Rest of Canada* is 81% supportive and 8% non-supportive. Despite *Banff Residents* reporting 62% support for the gondola, 83% see some benefit to it, while 90% of *Albertans* and 94% of the *Rest of Canada* also see benefits to the initiative. Across the board, the two most significant benefits reported are reducing traffic in town, and enhancing or opening the Cascade wildlife corridor. (See Appendix C)

## 8. Passenger Rail

**There is strong support for a dedicated passenger rail line from Calgary airport to Banff across the board.**

All three groups strongly support passenger rail from Calgary to Banff. *Banff* and the *Rest of Canada* residents support it the most at 90% each, while *Albertans* report 82%. Alberta residents' weak or non-support at 16% is statistically significant in its difference from *Banff* and the *Rest of Canada* residents.

All three groups see benefits from the passenger rail initiative. Ninety-three of Banff residents, 91% of Albertans and 94% Rest of Canada report seeing some benefits. The primary benefits reported are that it will decrease vehicle congestion and that it will be based on affordable fees and to a lesser degree is that it will directly connect the Calgary airport to Banff.

<b>Table 8: How supportive are you of this initiative: Passenger train service from Calgary to Banff?</b>			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>NET Top 2 Strongly/Moderately supportive</b>	90%	82%	90%
	B		B
<b>NET Bot 2 Weakly/Not at all supportive</b>	10%	16%	7%
		A C	
<b>(1) Strongly supportive</b>	64%	53%	60%
	B		B
<b>(2) Moderately supportive</b>	26%	29%	30%
<b>(3) Weakly supportive</b>	4%	10%	5%
		A C	
<b>(4) Not at all supportive</b>	5%	6%	2%
		C	
<b>(5) No opinion</b>	0%	2%	3%
		A	A B
<b>Base</b>	400	1371	2377

Appendix A.

Detailed results of Canadians views of Banff National Park

<b>q7_a - Banff represents an important part of Canadian heritage: Please indicate the extent to which you agree or disagree with each statement about Banff National Park.</b>			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>(1) Strongly agree</b>	56%	77%	77%
		A	A
<b>(2) Somewhat agree</b>	42%	17%	18%
	B C		
<b>(3) Somewhat disagree</b>	1%	2%	1%
		A	
<b>(4) Strongly disagree</b>	0%	2%	2%
		A	A
<b>(5) No opinion</b>	0%	1%	3%
		A	A B
<b>Base</b>	400	1371	2377

<b>q7_b - Banff's natural environment needs to be protected for all time: Please indicate the extent to which you agree or disagree with each statement about Banff National Park.</b>			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>(1) Strongly agree</b>	73%	78%	86%
			A B
<b>(2) Somewhat agree</b>	26%	17%	10%
	B C	C	
<b>(3) Somewhat disagree</b>	0%	3%	1%
		A C	
<b>(4) Strongly disagree</b>	1%	2%	2%
<b>(5) No opinion</b>	0%	0%	1%
			B
<b>Base</b>	400	1371	2377

**q7\_c - Banff needs to focus on long term sustainability solutions more than ever: Please indicate the extent to which you agree or disagree with each statement about Banff National Park.**

	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>(1) Strongly agree</b>	64%	64%	75%
			A B
<b>(2) Somewhat agree</b>	32%	25%	18%
	B C	C	
<b>(3) Somewhat disagree</b>	3%	7%	2%
		A C	
<b>(4) Strongly disagree</b>	1%	3%	2%
		A	
<b>(5) No opinion</b>	1%	1%	3%
			A B
<b>Base</b>	400	1371	2377

**q7\_d - It is important that Banff remains accessible to Canadians: Please indicate the extent to which you agree or disagree with each statement about Banff National Park.**

	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>(1) Strongly agree</b>	56%	87%	82%
		A C	A
<b>(2) Somewhat agree</b>	39%	10%	14%
	B C		B
<b>(3) Somewhat disagree</b>	3%	1%	2%
<b>(4) Strongly disagree</b>	1%	2%	2%
			A
<b>(5) No opinion</b>	1%	1%	1%
<b>Base</b>	400	1371	2377

**q7\_e - Banff is an important tourism destination for Canadian and international visitors: Please indicate the extent to which you agree or disagree with each statement about Banff National Park.**

	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>(1) Strongly agree</b>	60%	81%	76%
		A C	A
<b>(2) Somewhat agree</b>	38%	15%	19%
	B C		B
<b>(3) Somewhat disagree</b>	2%	1%	1%
<b>(4) Strongly disagree</b>	0%	2%	2%
		A	A
<b>(5) No opinion</b>	0%	0%	2%
			A B
<b>Base</b>	400	1371	2377

**q7\_f - Making Banff more pedestrian-friendly will improve the visitor experience: Please indicate the extent to which you agree or disagree with each statement about Banff National Park.**

	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>(1) Strongly agree</b>	46%	47%	56%
			A B
<b>(2) Somewhat agree</b>	40%	36%	30%
	C	C	
<b>(3) Somewhat disagree</b>	9%	10%	5%
	C	C	
<b>(4) Strongly disagree</b>	2%	6%	4%
		A C	
<b>(5) No opinion</b>	3%	2%	5%
			B
<b>Base</b>	400	1371	2377

**q7\_g - Banff National Park is important to all Canadians, not just those who live there; Please indicate the extent to which you agree or disagree with each statement about Banff National Park.**

	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>(1) Strongly agree</b>	58%	78%	78%
		A	A
<b>(2) Somewhat agree</b>	36%	17%	16%
	B C		
<b>(3) Somewhat disagree</b>	4%	3%	2%
	C		
<b>(4) Strongly disagree</b>	0%	2%	2%
		A	A
<b>(5) No opinion</b>	2%	1%	2%
			B
<b>Base</b>	400	1371	2377

**q7\_h - Decreasing vehicle congestion in Banff National Park will improve resident quality of life ; Please indicate the extent to which you agree or disagree with each statement about Banff National Park.**

	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>(1) Strongly agree</b>	57%	39%	53%
	B		B
<b>(2) Somewhat agree</b>	32%	37%	31%
		C	
<b>(3) Somewhat disagree</b>	6%	9%	5%
		C	
<b>(4) Strongly disagree</b>	2%	6%	3%
		A C	
<b>(5) No opinion</b>	3%	8%	7%
		A	A
<b>Base</b>	400	1371	2377

**q7\_j - Decreasing vehicle congestion on impact on wildlife in Banff National Park needs to be a priority; Please indicate the extent to which you agree or disagree with each statement about Banff National Park.**

	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>(1) Strongly agree</b>	50%	47%	63%
			A B
<b>(2) Somewhat agree</b>	40%	32%	26%
	B C	C	
<b>(3) Somewhat disagree</b>	8%	12%	5%
		A C	
<b>(4) Strongly disagree</b>	2%	7%	3%
		A C	
<b>(5) No opinion</b>	1%	2%	3%
			A
<b>Base</b>	400	1371	2377

**Appendix B**

**Benefits Data for intercept Lo Aerial Transit and Passenger Rail**

<b>qa2_top1- (See benefits) NET most important: Of the following possible benefits of the intercept parking lot, which of these benefits are most important to you?</b>			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>2) Car-Free and pedestrian- friendly downtown area</b>	43%	44%	51%
			A B
<b>(1)Free parking 5 minutes from downtown</b>	30%	31%	25%
		C	
<b>(4) That it is a tax-free initiative</b>	14%	15%	11%
		C	
<b>(3) Central gathering place to disperse visitors throughout town</b>	11%	9%	11%
			B
<b>(5) Other</b>	2%	1%	1%

<b>qa2_top2- (See benefits) NET TOP 2 most important: Of the following possible benefits of the intercept parking lot, which of these benefits are most important to you?</b>			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>2) Car-Free and pedestrian- friendly downtown area</b>	63%	69%	76%
			A B
<b>(1)Free parking 5 minutes from downtown</b>	57%	65%	58%
		A C	
<b>(4) That it is a tax-free initiative</b>	37%	30%	36%
	B		B
<b>(3) Central gathering place to disperse visitors throughout town</b>	34%	35%	27%
	C	C	
<b>(5) Other</b>	9%	1%	2%



## Appendix C

### Detailed level of support of Aerial Transit if can be seen crossing over the TransCanada Highway and Benefits of Aerial Transit

qb3 – Top 2-How supportive are you of the aerial transit (gondola) proposal if the gondola could be seen from the TransCanada Highway (as it crosses over the Norquay Road Bridge)?			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>NET Top 2 Strongly/Moderately supportive</b>	61%	79%	81%
		A	A B
<b>NET Bot 2 Weakly/Not at all supportive</b>	35%	13%	8%
	B C	C	
<b>(1) Strongly supportive</b>	28%	46%	49%
		A	A
<b>(2) Moderately supportive</b>	34%	33%	33%
<b>(3) Weakly supportive</b>	13%	8%	5%
	B C	C	
<b>(4) Not at all supportive</b>	22%	6%	2%
	B C	C	
<b>(5) No opinion</b>	3%	8%	11%
		A	A B
<b>Base</b>	400	1371	2376

qb3 _Top 1- (See benefits) NET most important: Of the following possible benefits of the aerial transit(gondola), which of these benefits are most important to you?			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>(3) Reducing traffic in the Town of Banff</b>	A	B	C
	39%	18%	18%
	B C		
<b>(2) Enhancing the wildlife corridor</b>	37%	43%	47%
			A B
<b>(6) That this is a tax-free initiative</b>	10%	14%	7%
		C	
<b>(1) Shrinking Norquay's lease to make room for wildlife</b>	8%	11%	16%
			A B
<b>(4) Creation of a new visitor centre above the ski and sightseeing area</b>	5%	14%	11%
		A C	A
<b>(5) Other</b>	2%	0%	1%
	A	B	C
<b>(3) Reducing traffic in the Town of Banff</b>	39%	18%	18%

Appendix D

Benefits of Passenger Rail

<b>qb4 _Top 1- (See benefits) NET most important: Of the following possible benefits of the passenger rail service, which of these benefits are most important to you?</b>			
	region - Region		
	(1) Banff residents	(2) Alberta	(3) Rest of Canada
	A	B	C
<b>(7) Less car traffic into Banff</b>	45%	33%	30%
	B C		
<b>(5) Affordable fares</b>	21%	27%	24%
		A	
<b>(3) Ability to fly to Calgary and connect directly via train to Banff</b>	18%	16%	25%
			A B
<b>(4) Stops in key communities along the route</b>	6%	9%	8%
		A	
<b>(1) Up to 8 trips per day</b>	6%	6%	6%
<b>(2) Increasing labor mobility and economic investment</b>	4%	8%	5%
		A C	
<b>(6) Other</b>	1%	1%	1%