

Innovative Research Group, Inc.

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Toronto :: Vancouver



How Big is the Challenge of Siting Infrastructure?



*Prepared for:
The Canada Energy Summit*

June 25, 2014

Methodology

- These are the findings of Innovative Research Group's (INNOVATIVE) seventh Canadian Understanding NIMBY poll conducted from October 28th to November 13th 2013.
- This online survey of **n=2,251** adult Canadians was conducted on INNOVATIVE's Canada 20/20 national research panel. There were oversamples in BC, Alberta, Ontario and Quebec. After weighting those regions down, the final weighted national sample was **n=1,500**.
- The Canada 20/20 Panel is recruited from a wide variety of sources to reflect the age, gender, region and language characteristics of the country as a whole. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population, according to Census data, to provide results that are intended to approximate a probability sample.
- INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey and panel members can only complete a particular survey once.
- The Market Research and Intelligence Associations notes that since online samples can not be drawn using a random sample, margin of error should not be calculated for online surveys.
- That said, this is a representative panel and it has provided election polls within the margin of error for each of the past four federal elections.

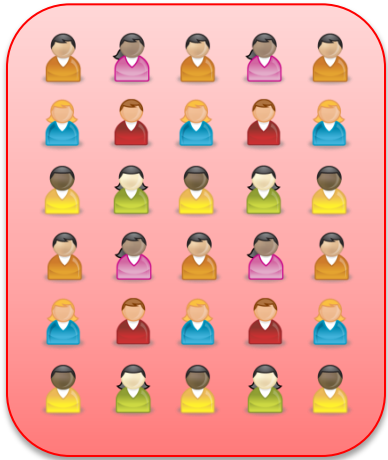
Note: *Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

Siting Infrastructure:

General Support and NIMBYism

Public Segmentation: Who are Opponents, Supporters and the Persuadable Public?

Core Opponents



Nothing proponents say or do will influence this group's opinion towards the project

Segmenting the Public:

Values

- **NOPE** (*Nowhere On Planet Earth*)
- **BANANA** (*Build Absolutely Nothing Anywhere Near Anyone*)
- **NIMBY** (*Not In My BackYard*)

Need

General Project Orientation

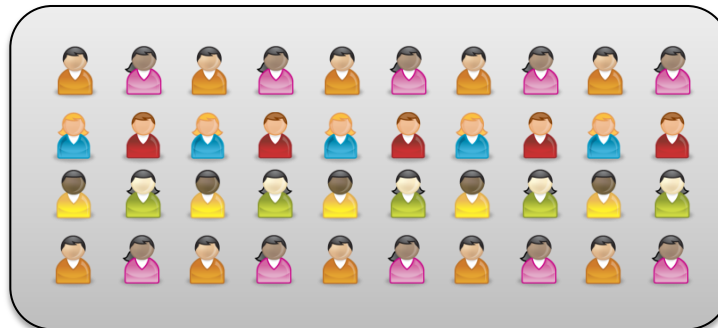
Dread

Core Supporters



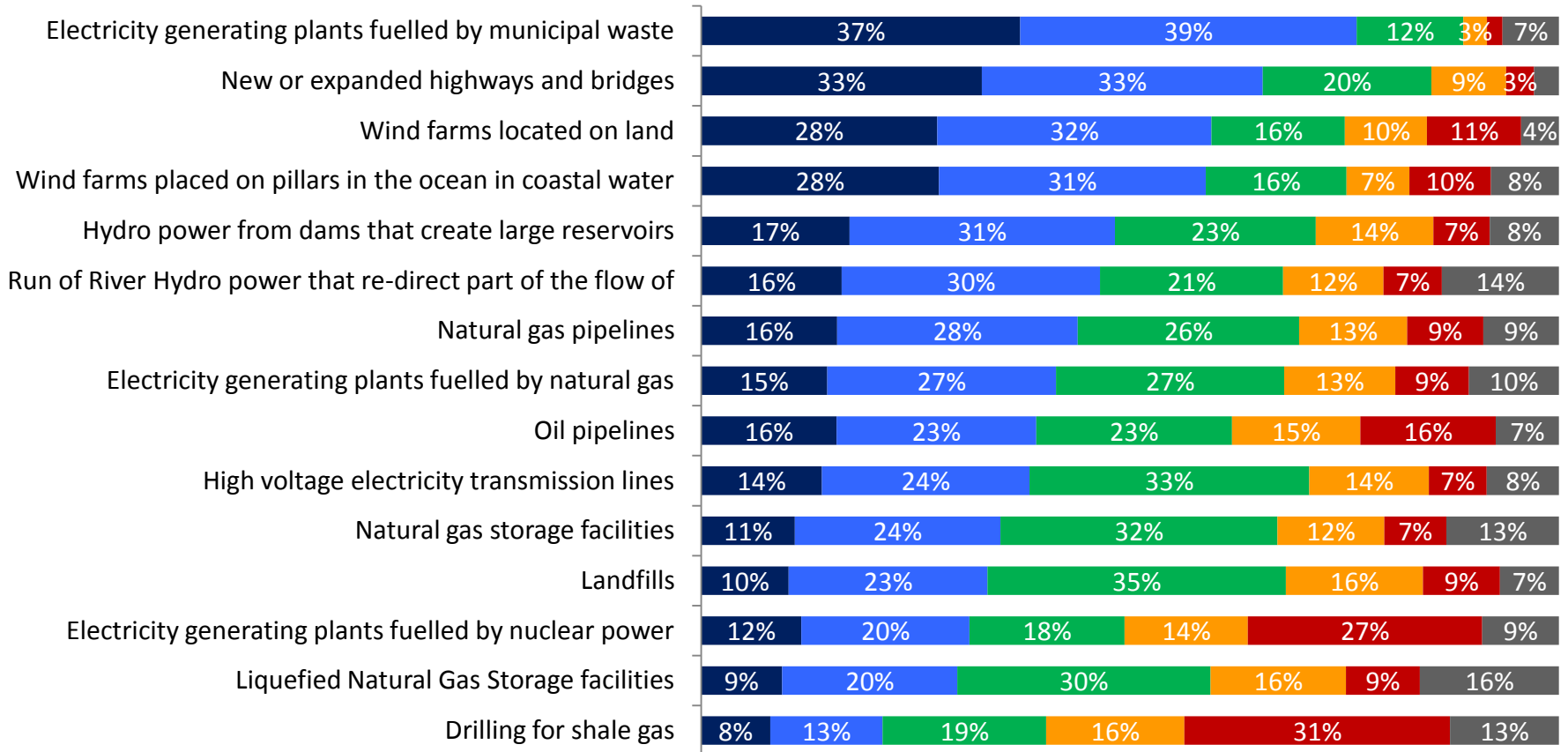
Nothing opponents say or do will influence this group's opinion towards the project

Persuadable Public



Electricity from waste, new highways, wind top supported projects; shale gas, LNG storage lowest

Q Generally speaking, would your initial reaction be to support or oppose a proposal to build each of the following projects in your **province**? [CANADA]

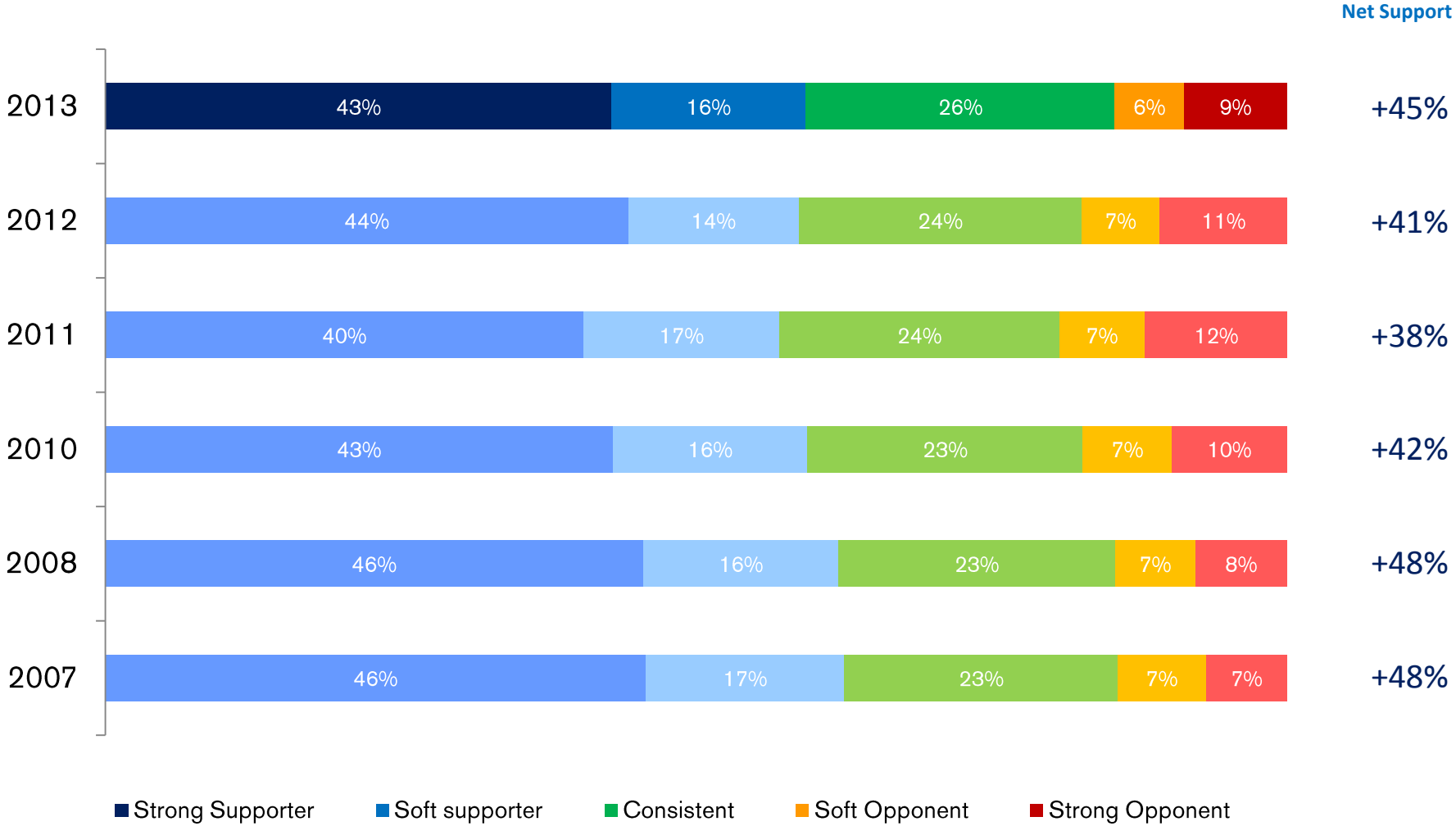


■ Strongly support
 ■ Somewhat support
 ■ Neither support nor oppose
■ Somewhat oppose
 ■ Strongly oppose
 ■ Don't know



Almost 6-in-10 generally support projects, less than 1-in-10⁶ are strong opponents; support increasing over last 2 years

General Support for Projects Index



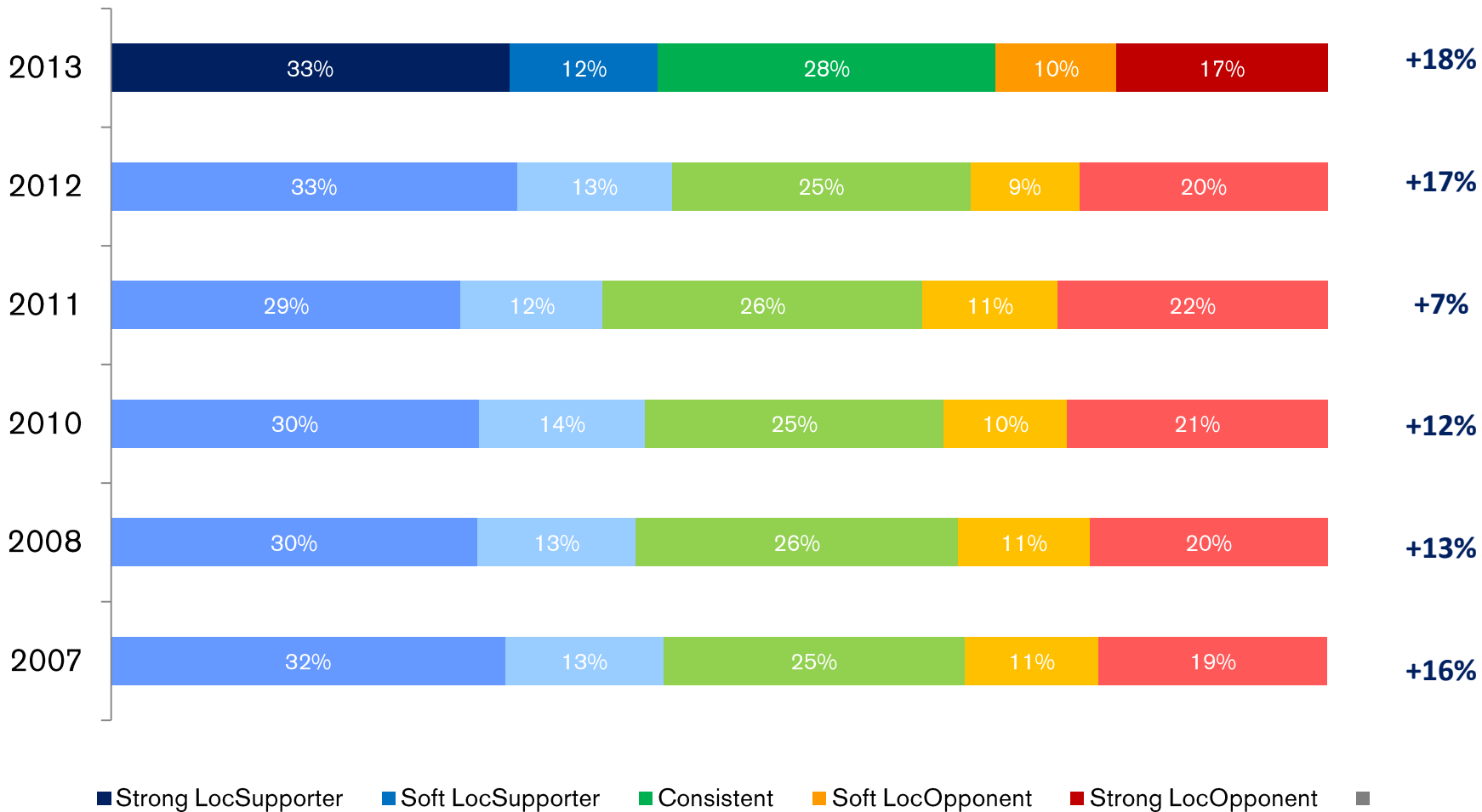
■ Strong Supporter
 ■ Soft supporter
 ■ Consistent
 ■ Soft Opponent
 ■ Strong Opponent



Locally, just under half (45%) support projects; opposition peaked in 2011, now at 27%

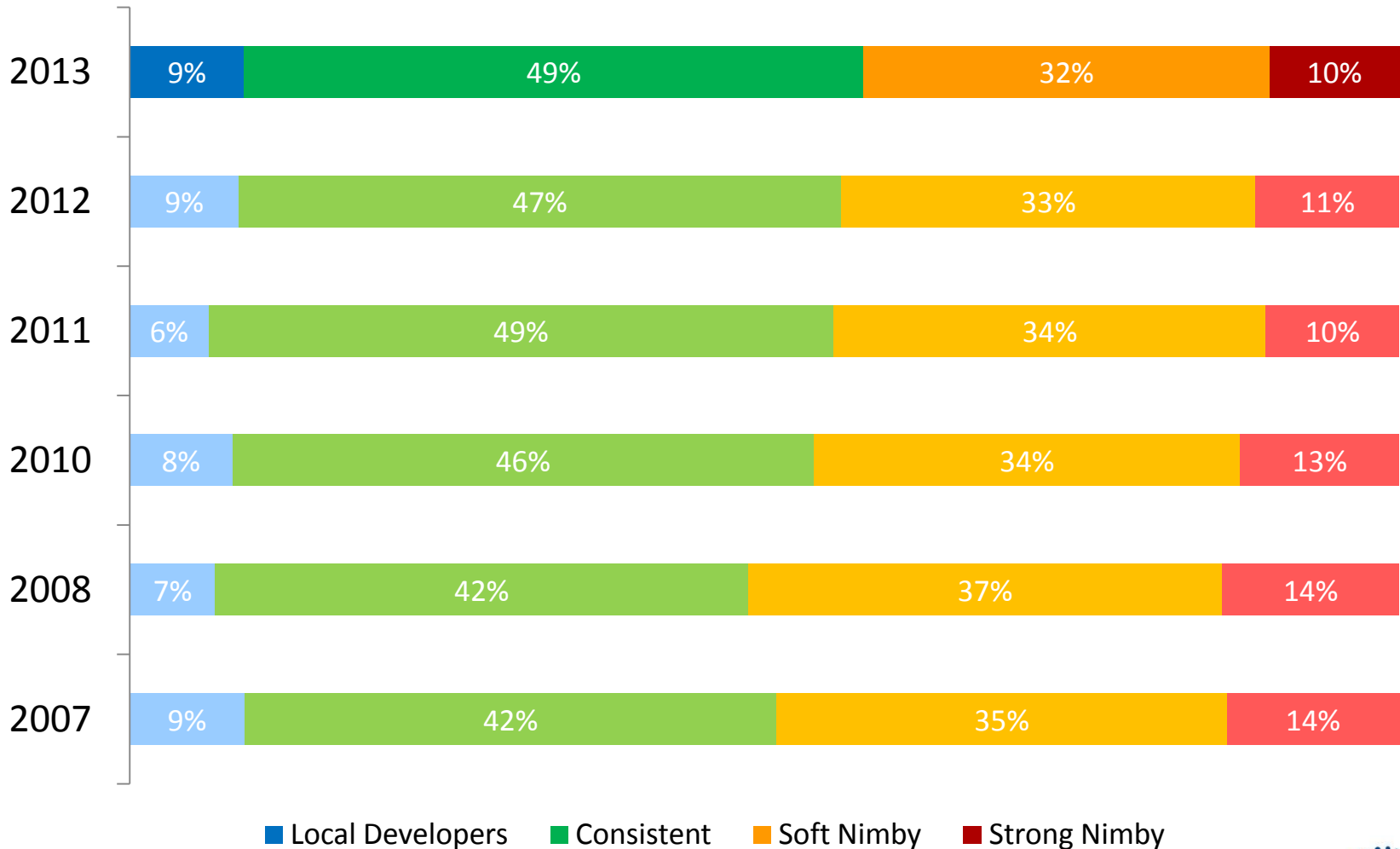
Local Support for Projects Index

Net Local Support



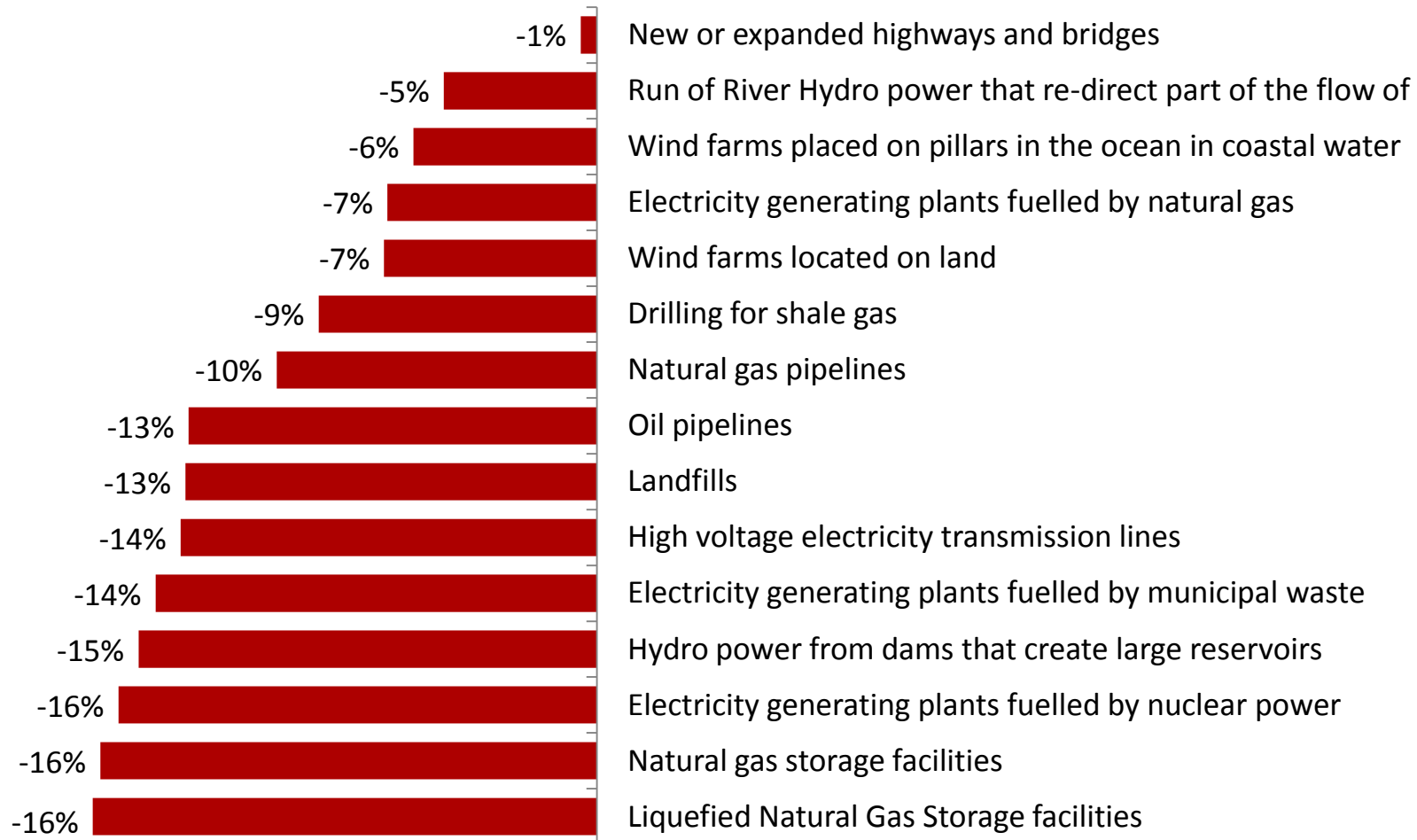
Gradual increase in consistency and decrease in NIMBYism over last 6 years ⁸

Change in support or opposition in General vs. Local projects



LNG, natural gas storage, nuclear, hydro dams most NIMBY prone projects across Canada⁹

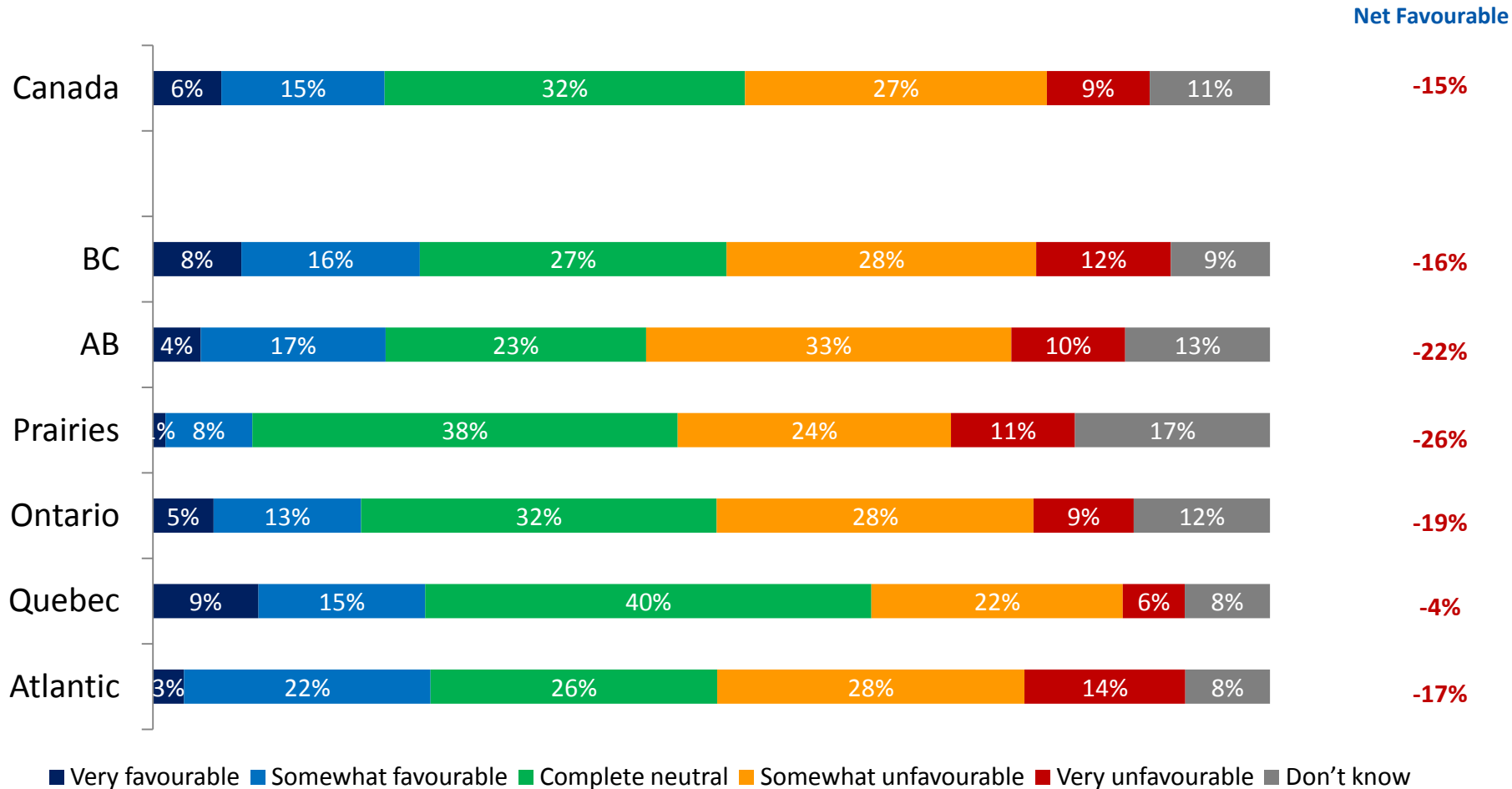
Canada NIMBY factor: (Net Support in Community)–(Net support in Province)



The “NIMBY” label has more negatives than positives, particularly in Prairies, but less so in Quebec



Some times when people oppose local infrastructure projects they are called NIMBYs which is short for Not In My Back Yards. When you think of some local people opposing an infrastructure project in their community, what is your general feeling about them?

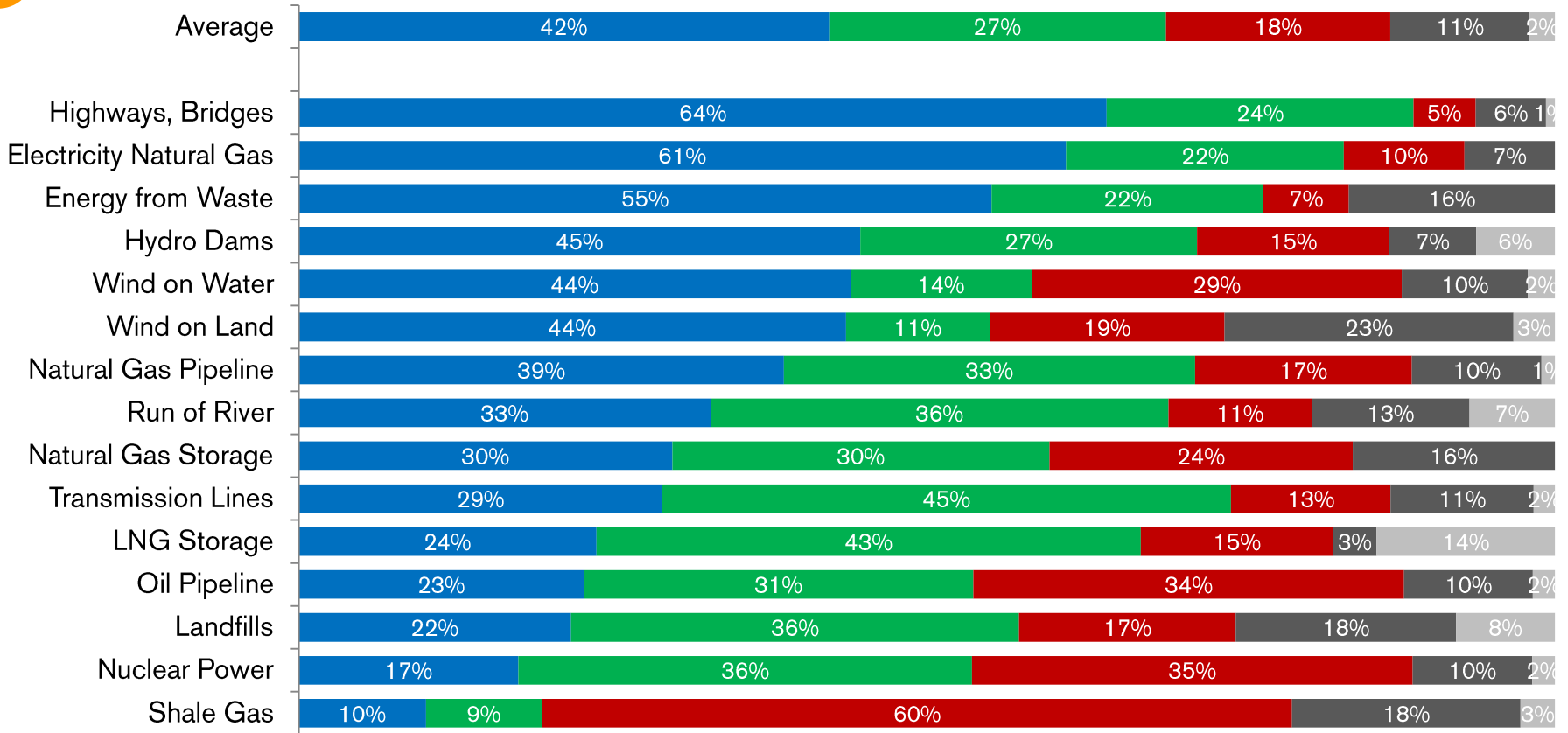


Permission in the Real World

Respondents most likely to support highways, least likely to support nuclear power and drilling for shale gas



Which of the following best represents your view of that project?



- It's a good thing for the community and I support it
- It's a bad thing for the community and I oppose it
- Don't know

- I don't like it but I think it is necessary
- I don't feel I know enough to judge this project



Persuadable Public: What influences support or opposition towards energy infrastructure projects ¹³



Persuadable Public



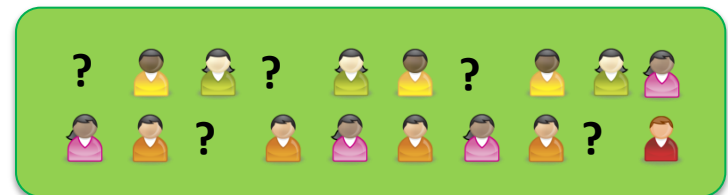
Public Opinion Hurdles



Opponents

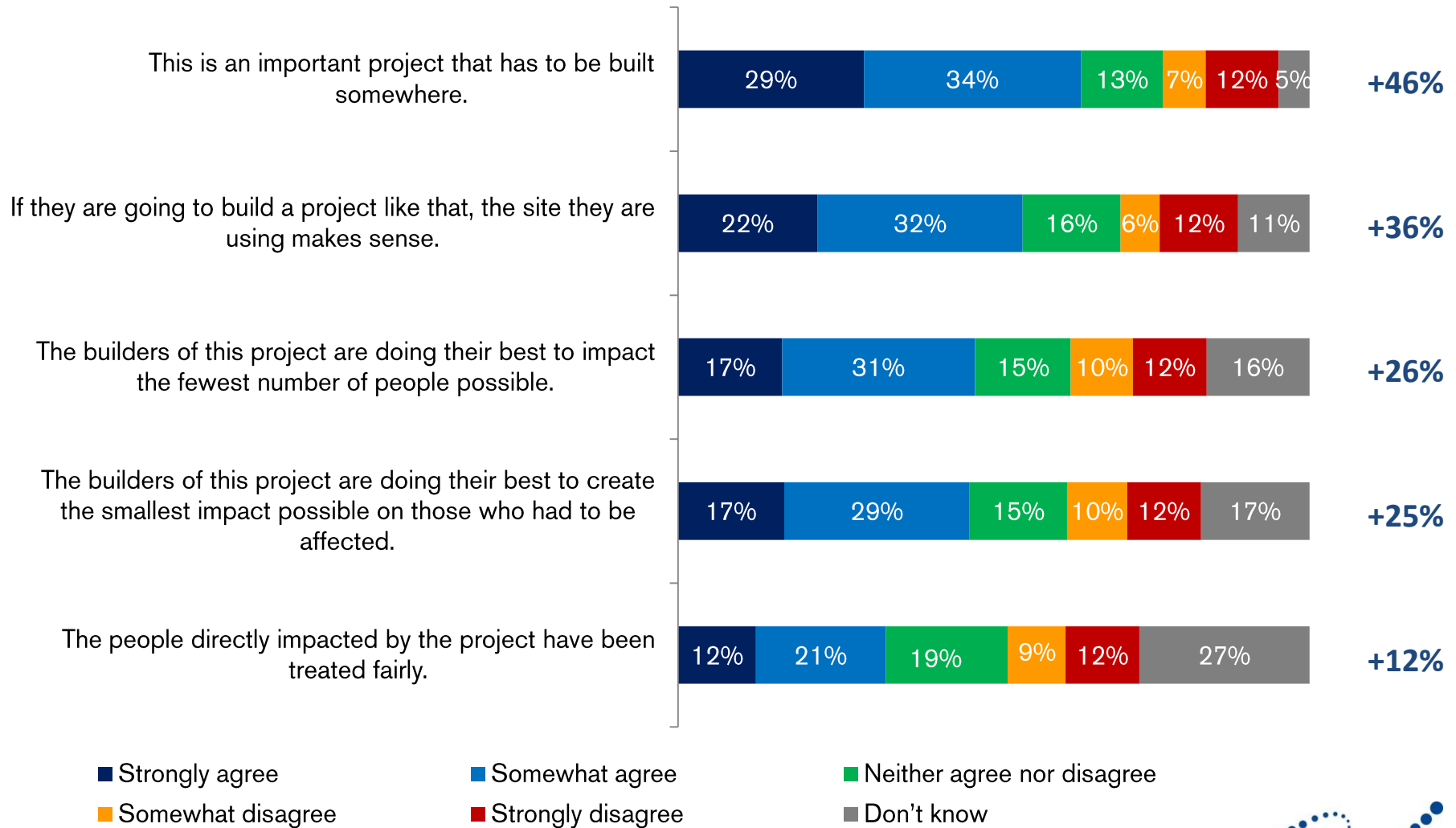


Supporters



Key Hurdles: Overall

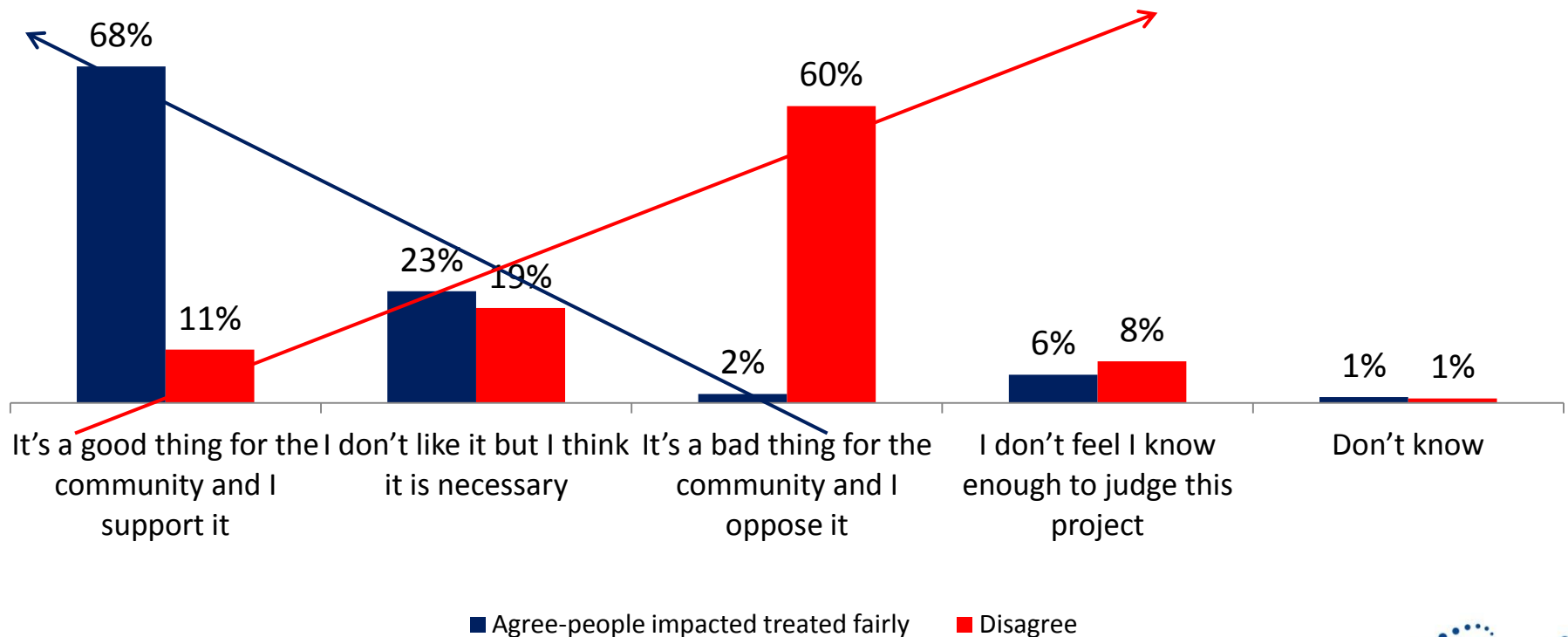
Q Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?



How the public reacts to a veto question has a strong impact on support



Which of the following best represents your view of that project BY **The people impacted by the project have been treated fairly.** (All closest projects)



Five Key Things To Remember

1. The public is generally open to most forms of infrastructure.
2. Local support is significantly lower than general support.
3. While just over four-in-ten respondents show some NIMBYism, - supporting projects in your province but not your community – most people are only occasional NIMBYs.
4. Despite the fact that a large minority of people show some NIMBYism, NIMBY's do not have a great image.
5. Most real world projects enjoy social permission. But that permission is grounded in public reaction to five questions that are specific to each project.



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