Innovative Research Group, Inc. *www.innovativeresearch.ca* 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 28<sup>th</sup> to November 13<sup>th</sup> 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.

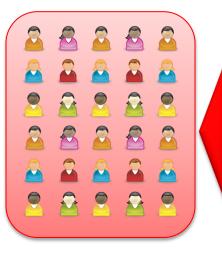
## **Siting Infrastructure:**

## **General Support and NIMBYism**



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

Core Opponents



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

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#### **Segmenting the Public:**

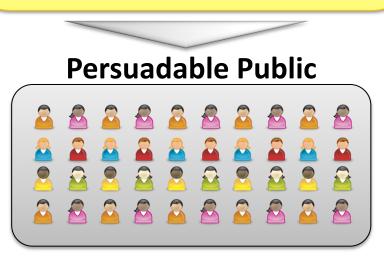
#### Values

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

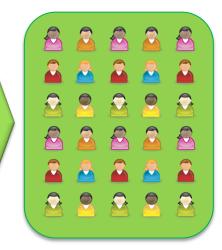
#### Need

#### **General Project Orientation**

#### Dread



Core Supporters



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



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

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

Electricity generating plants fuelled by municipal waste New or expanded highways and bridges Wind farms located on land Wind farms placed on pillars in the ocean in coastal water Hydro power from dams that create large reservoirs Run of River Hydro power that re-direct part of the flow of Natural gas pipelines Electricity generating plants fuelled by natural gas **Oil pipelines** High voltage electricity transmission lines Natural gas storage facilities Landfills Electricity generating plants fuelled by nuclear power Liquefied Natural Gas Storage facilities Drilling for shale gas

37%		39	12% <mark>3%</mark> 7%			
33%		33%	2	0%	<mark>)% 3%</mark>	
28%		32%	16%	10% 1	<mark>.1%</mark> 4%	
28%		31%	16%	7% 109	8%	
17%	31%		23%	14% 7	<mark>%</mark> 8%	
16%	30%	21	% 12	% 7%	14%	
16%	28%	26	% 1	.3% 9%	9%	
15%	27%	27%	13	% 9%	10%	
16%	23%	23%	15%	16%	7%	
14%	24%	33%		14% 79	8%	
11% 2	24%	32%	129	% 7%	13%	
10% 2	3%	35%	1	.6% 9	<mark>%</mark> 7%	
12% 20	0% 18	% 14	%	27%	9%	
9% 20%	%	30%	16%	9%	16%	
8% 13%	19%	16%	31%		13%	

Strongly support

Somewhat oppose

Somewhat supportStrongly oppose

Neither support nor oppose

■ Don't know

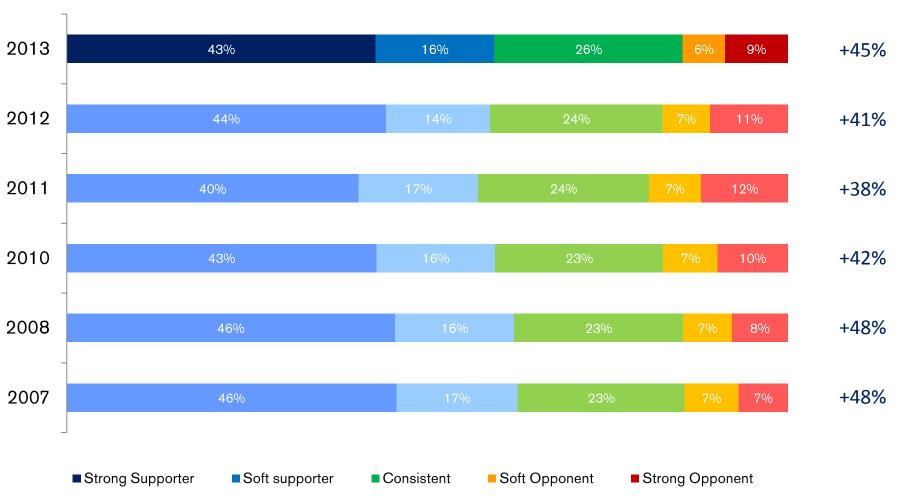


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## Almost 6-in-10 generally support projects, less than 1-in-10<sup>6</sup> are strong opponents; support increasing over last 2 years

**General Support for Projects Index** 





**Net Support** 

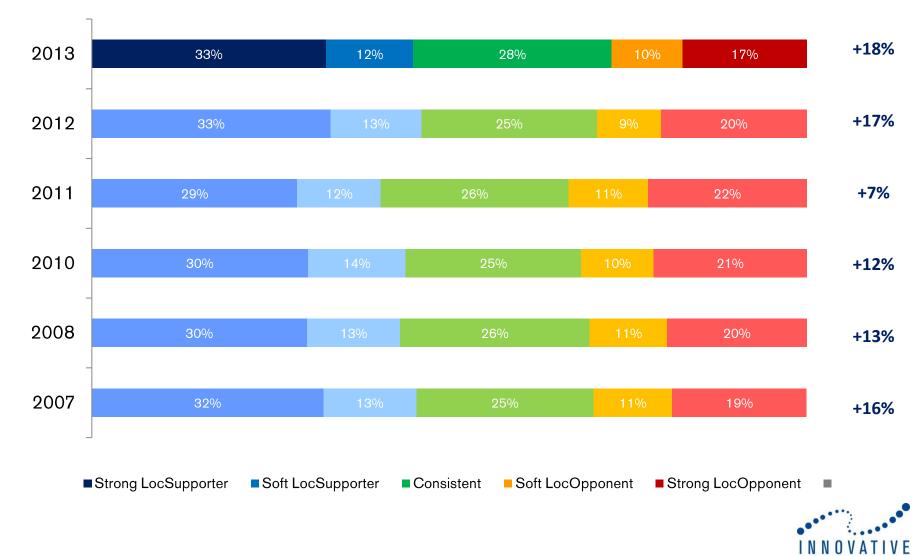
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# Locally, just under half (45%) support projects; opposition <sup>7</sup> peaked in 2011, now at 27%

Local Support for Projects Index

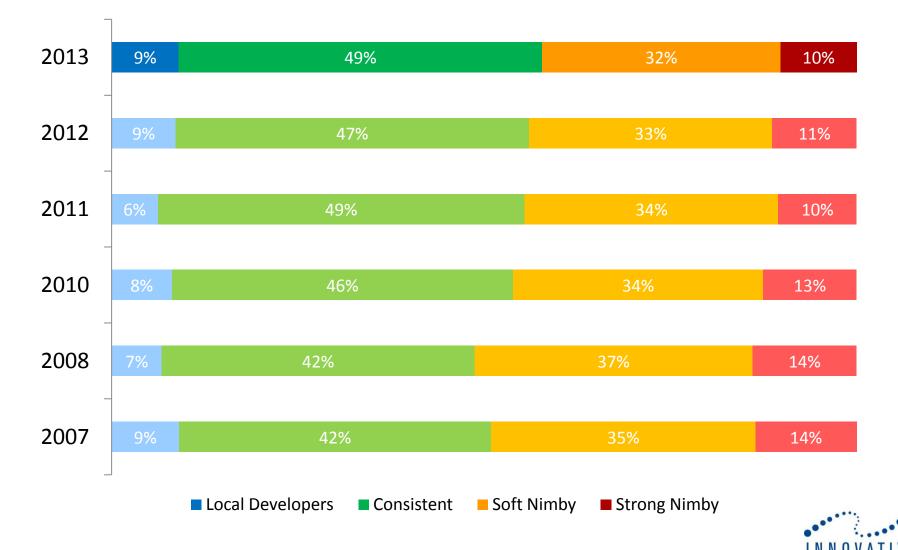
**Net Local Support** 

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### Gradual increase in consistency and decrease in NIMBYism<sup>8</sup> over last 6 years

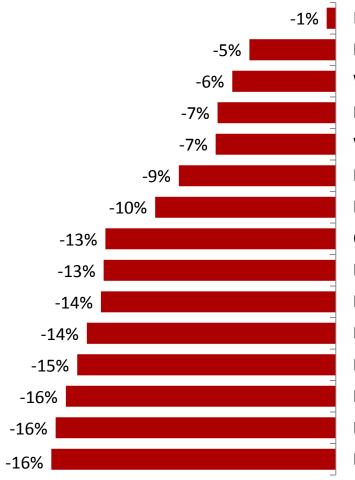
Change in support or opposition in General vs. Local projects



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### LNG, natural gas storage, nuclear, hydro dams most NIMBY<sup>9</sup> prone projects across Canada

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

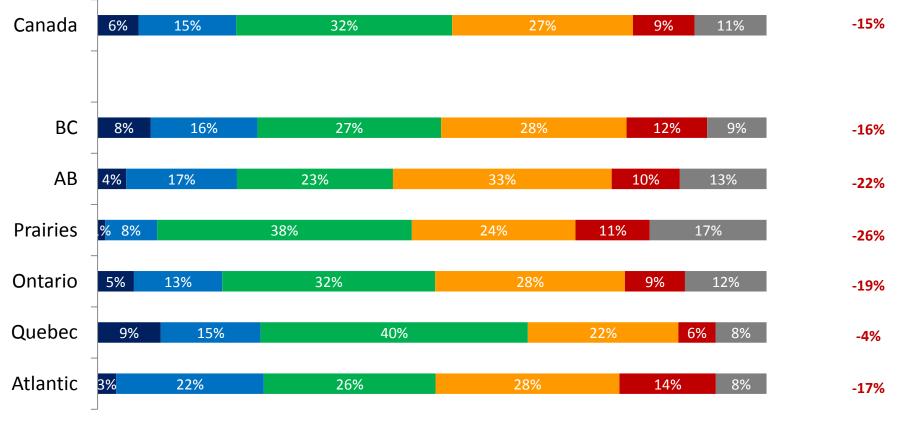


New or expanded highways and bridges Run of River Hydro power that re-direct part of the flow of Wind farms placed on pillars in the ocean in coastal water Electricity generating plants fuelled by natural gas Wind farms located on land Drilling for shale gas Natural gas pipelines **Oil** pipelines Landfills High voltage electricity transmission lines Electricity generating plants fuelled by municipal waste Hydro power from dams that create large reservoirs Electricity generating plants fuelled by nuclear power Natural gas storage facilities Liquefied Natural Gas Storage facilities



## 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?



■ Very favourable ■ Somewhat favourable ■ Complete neutral ■ Somewhat unfavourable ■ Very unfavourable ■ Don't know



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**Net Favourable** 

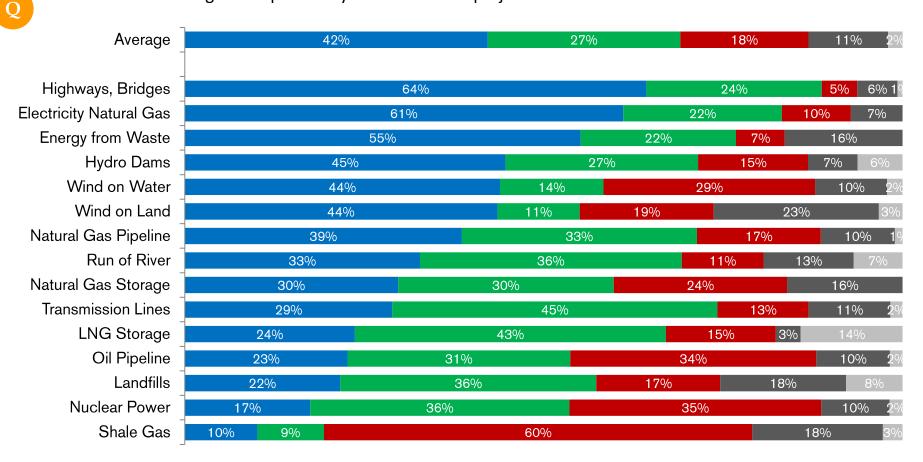
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## Permission in the Real World



## Respondents most likely to support highways, least likely <sup>12</sup> 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

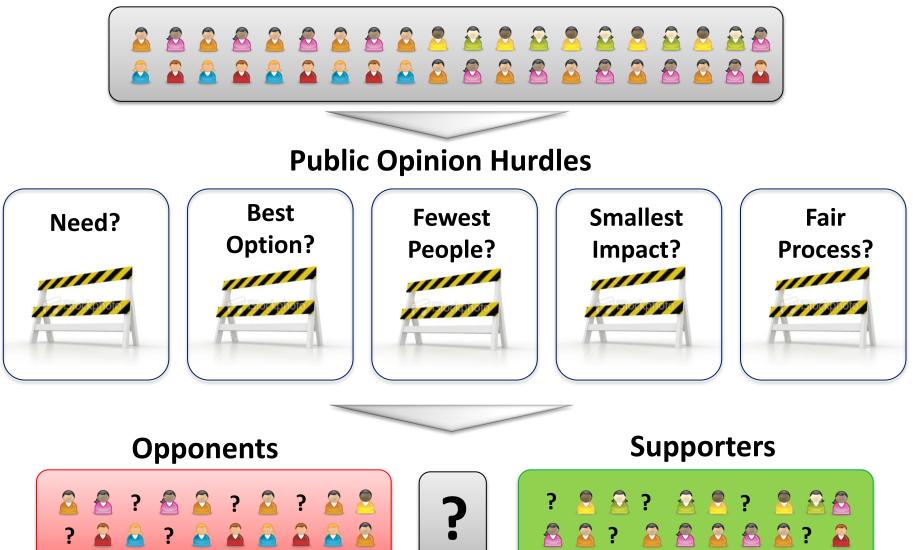


### **Persuadable Public: What influences support or opposition**<sup>13</sup>

towards energy infrastructure projects

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#### **Persuadable Public**



#### **Key Hurdles: Overall**

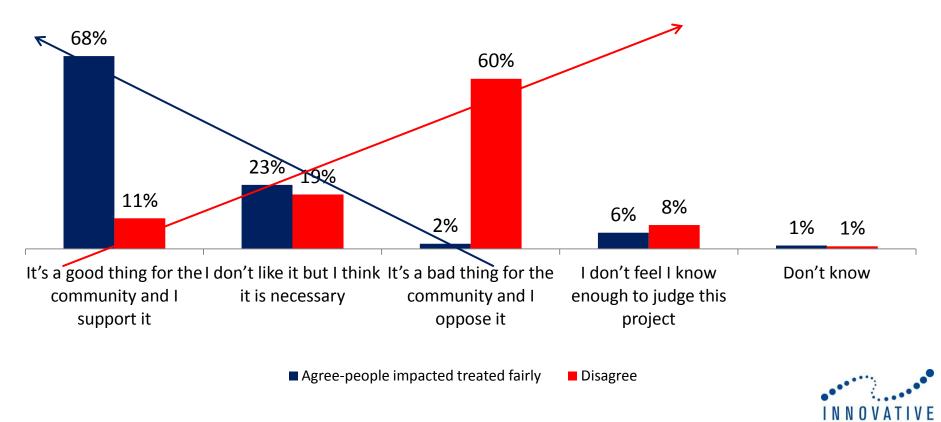
O pou strongly agree, somew	hat agree, somewhat	disagree	e or stro	ngly disa	gree wit	th the foll	owing state	ements?
	- This is an important project that has to be built somewhere.		%	34%		<mark>13%</mark> 7% 12% 5%		+46%
If they are going to build a project like that, the site the using makes sense.		22%		32%		16% 6% 12% 11%		
The builders of this project are doir the fewest number of peo	• .	17%	3	1%	15%	10% 12%	6 16%	+26%
The builders of this project are doing their best to create the smallest impact possible on those who had to be affected.		17%	29	29%		<mark>10%</mark> 12%	0 17%	+25%
The people directly impacted by the project have been treated fairly.		12%	21%	19%	9%	12%	27%	+12%
<ul> <li>Strongly agree</li> <li>Somewhat disagree</li> </ul>	<ul> <li>Somewhat agree</li> <li>Strongly disagree</li> </ul>			Neither agı Don't know		disagree	•••• I N N	O V A T I V E

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# 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)** 

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#### **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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