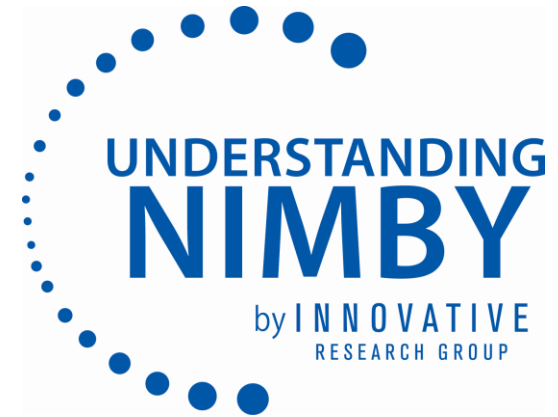


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Toronto :: Vancouver



Public Opinion Opportunities and Challenges In Canada and the US



Prepared for:

The WEC North American Region Energy Forum

June 26, 2014

Methodology

Canada

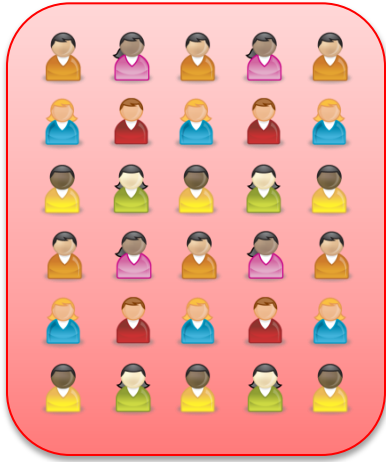
- The 2011 Canadian online survey was conducted among **2,762** adult Canadians from September 22nd to October 14th, 2011.
- The 2013 Canadian online survey was conducted among **2,251** adult Canadians from October 15th to October 29th, 2013.

United States

- The 2011 USA portion of the analysis is based on an online survey of **1,009** respondents conducted from September 23rd to 30th, 2011.
- The 2014 USA portion of the analysis is based on an online survey of **1,005** respondents conducted on May 6th and 7th, 2014.

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

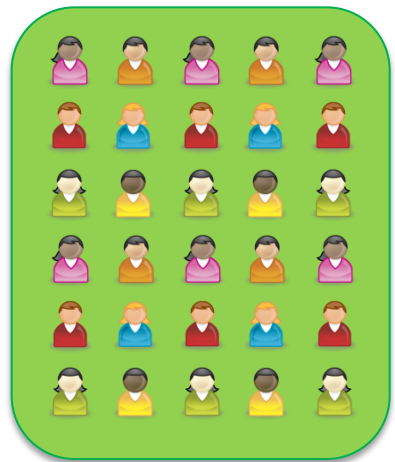
- **NOPE** (*Nowhere On Planet Earth*)
- **BANANA** (*Build Absolutely Nothing Anywhere Near Anyone*)
- **NIMBY** (*Not In My BackYard*)

Need

General Project Orientation

Dread

Core Supporters



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

Persuadable Public

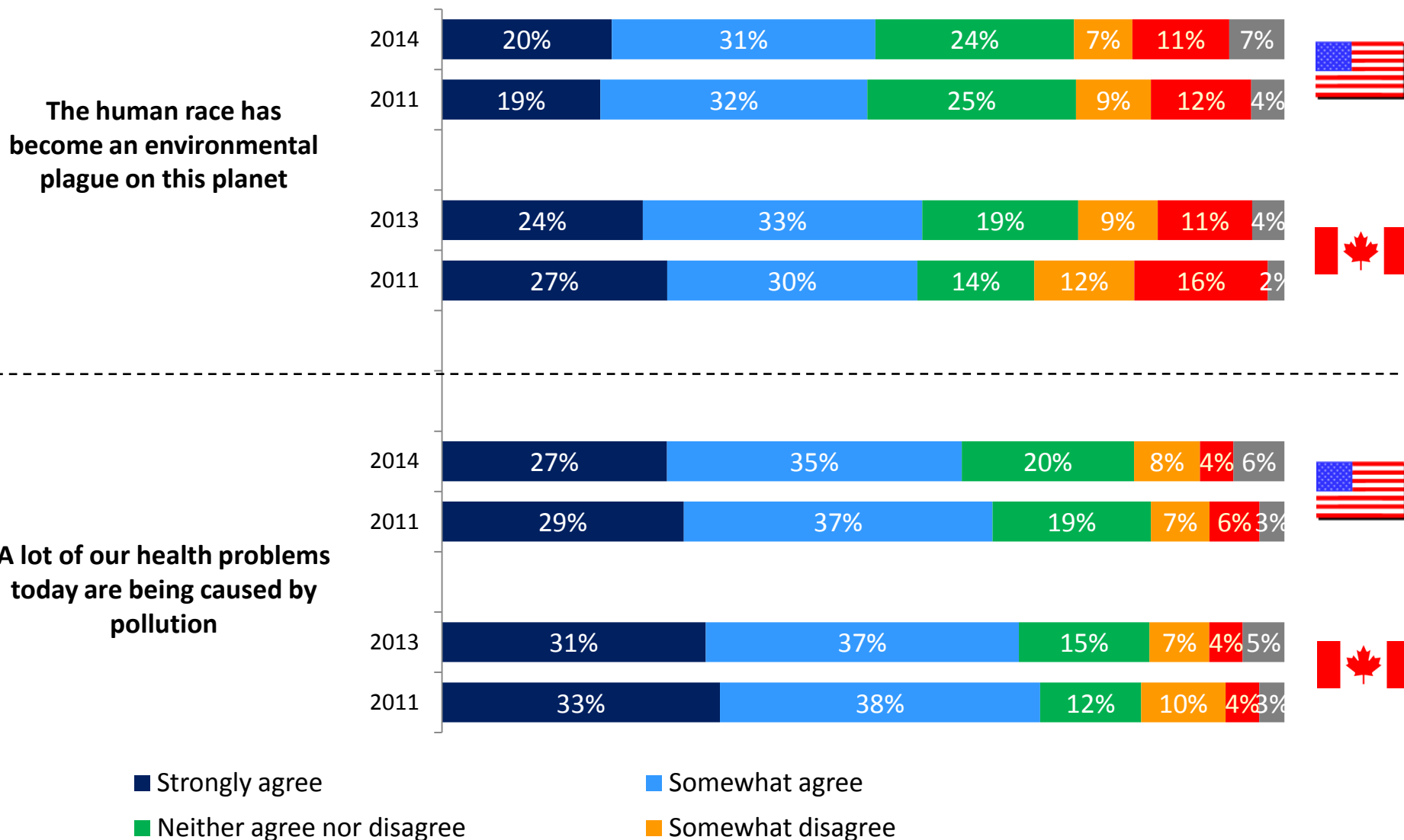


Core Values

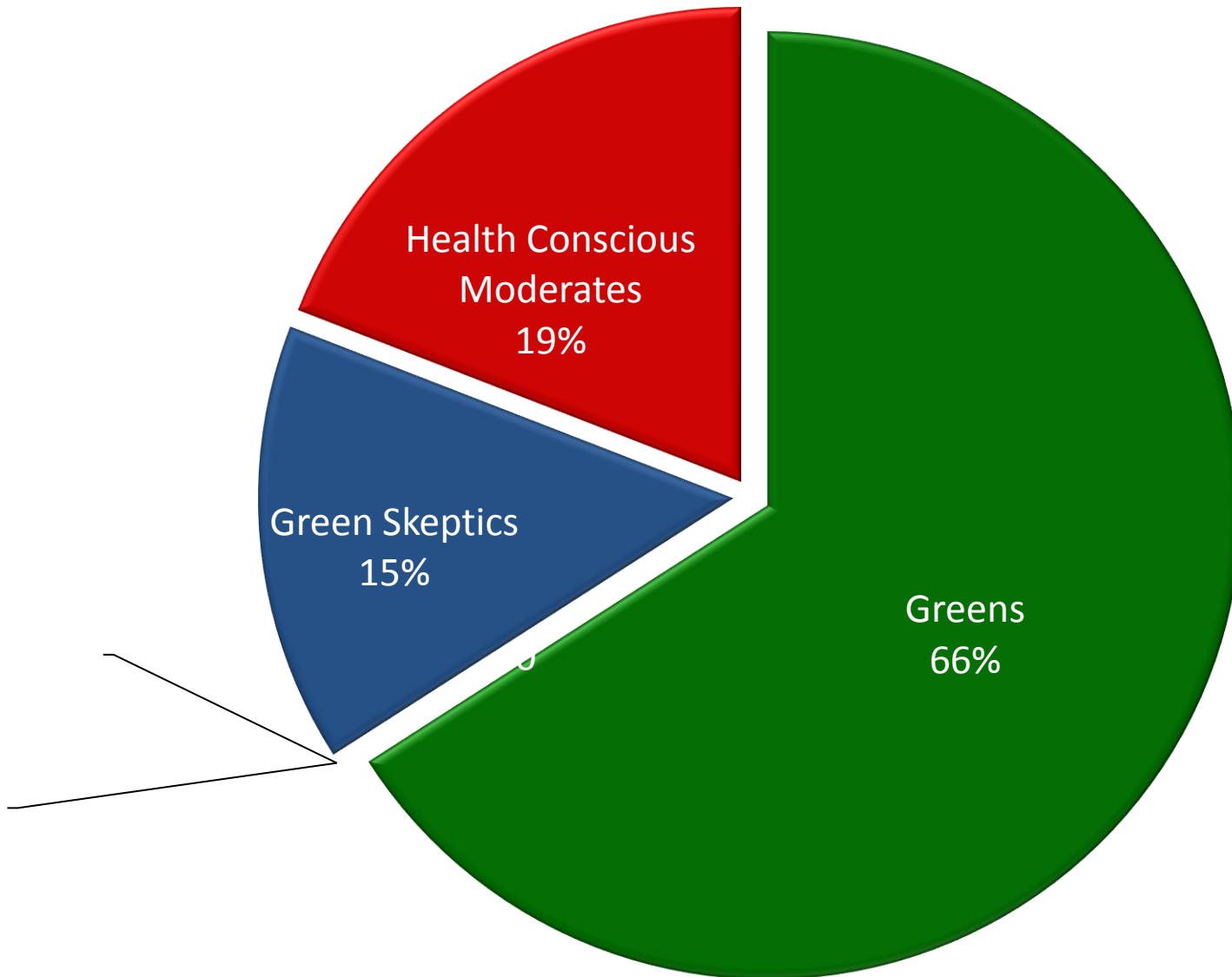
Core environmental values: Slightly stronger in Canada than⁵ the United States



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



The first key division is on the environment

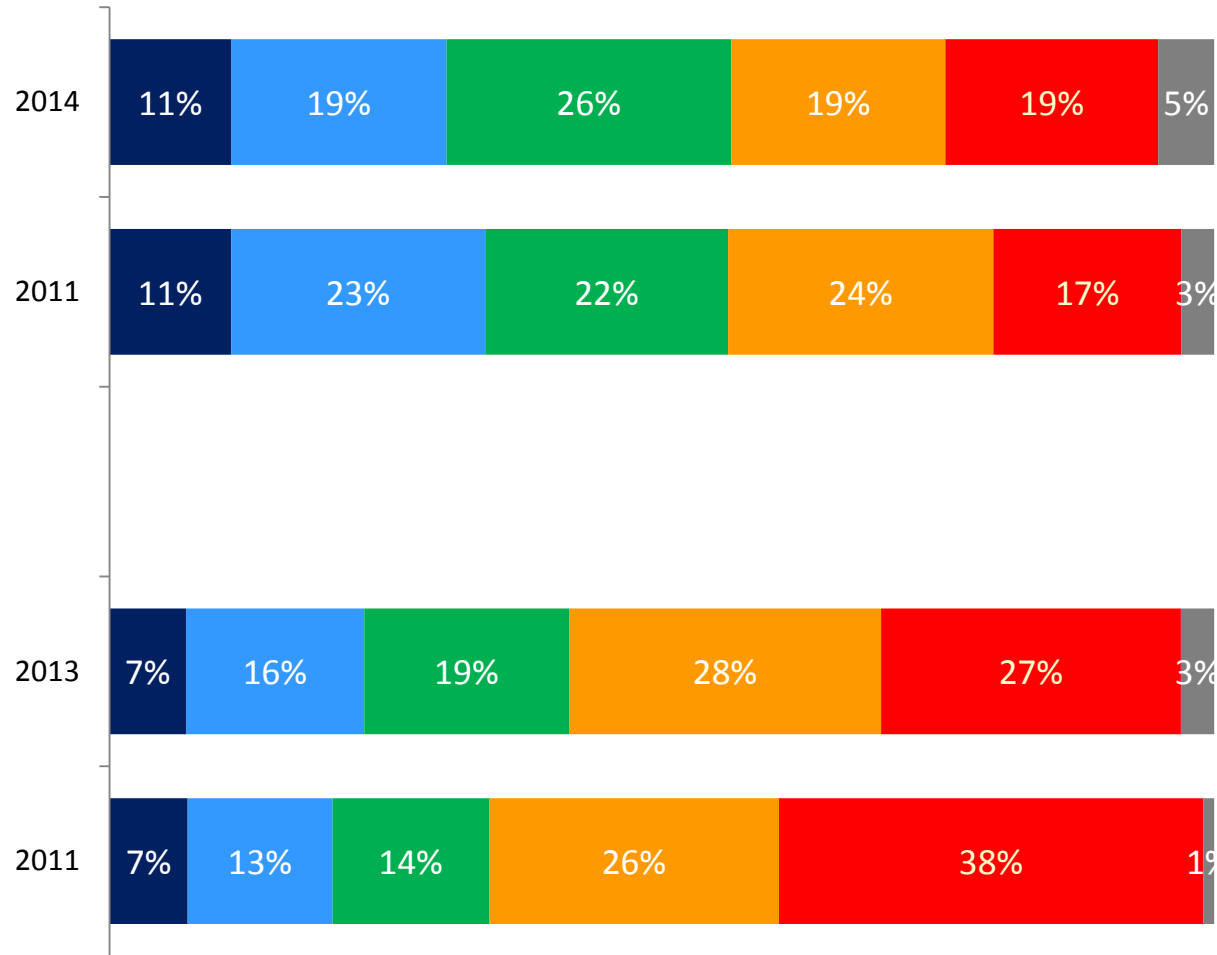


Concern about costs higher in US than Canada but converging



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

I don't care where we get power from so long as it is at the lowest price

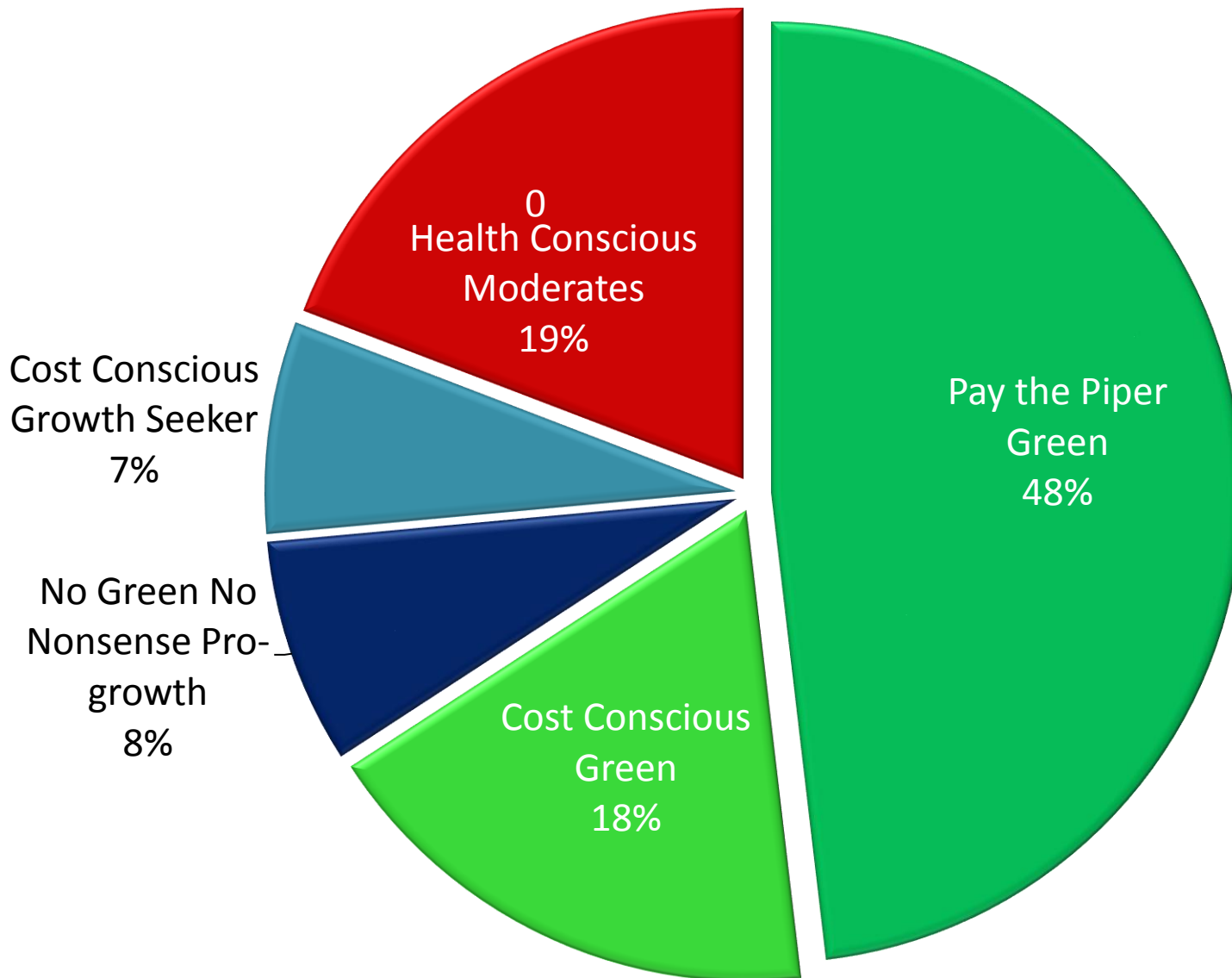


Strongly agree
Somewhat disagree

Somewhat agree
Strongly disagree

Neither agree nor disagree
Don't know

NIMBY Clusters: Concerns about cost divide clusters further

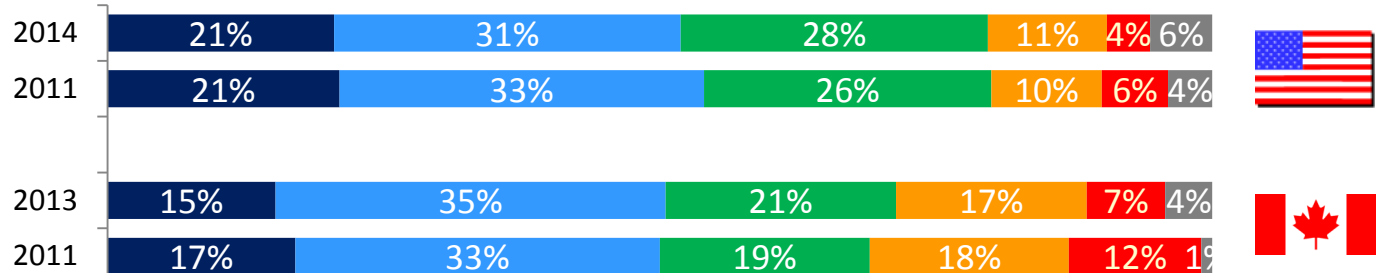


A majority from both countries in all survey waves believe corporations are suppressing green technologies ⁹

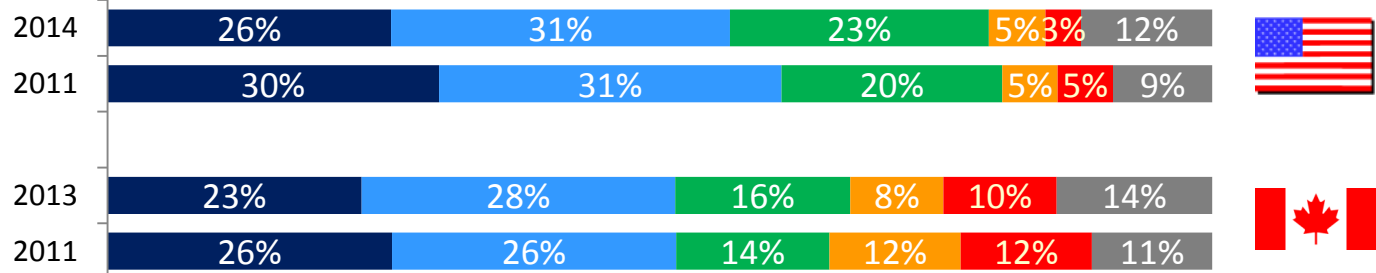


Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?

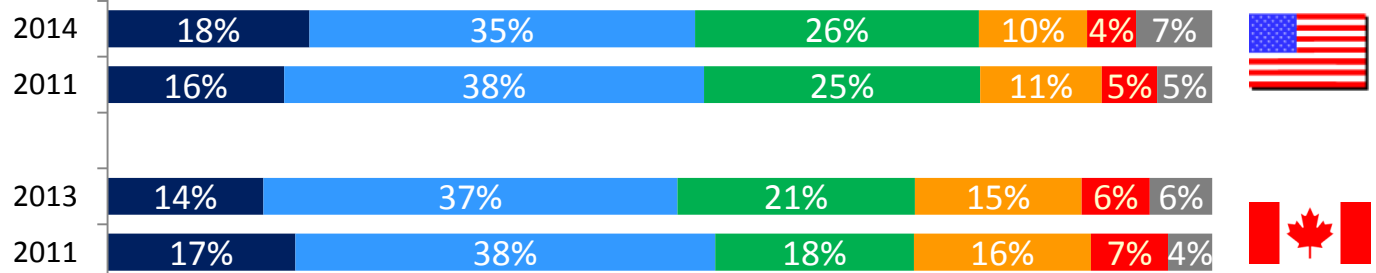
Our communities need to continue to grow if we want to sustain our quality of life



There are technologies that can produce environment friendly power at little or no cost that are being deliberately suppressed by big corporations and special interests



Science can find a way to solve most of our environmental challenges



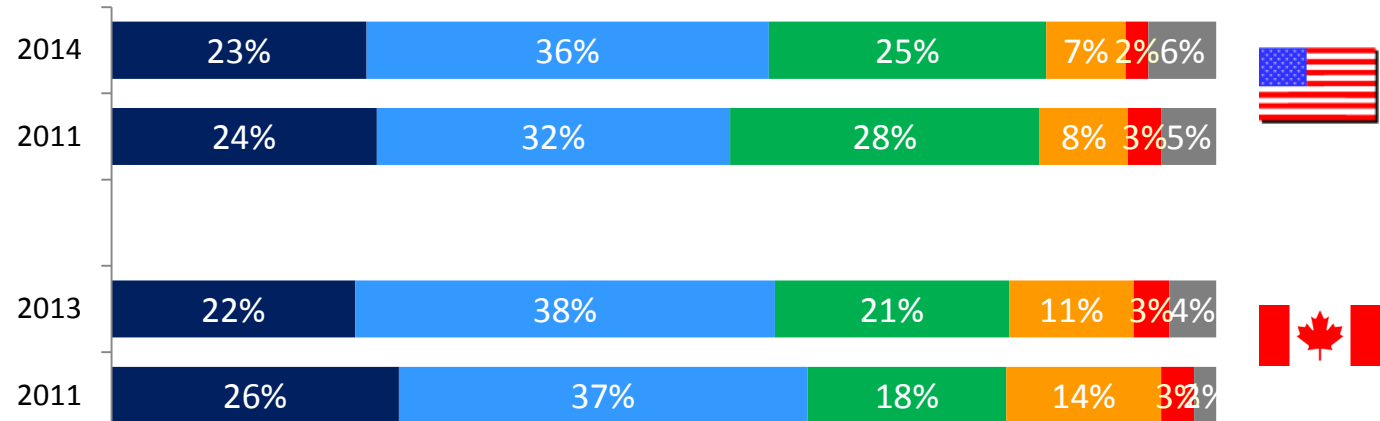
■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know

BANANA is a bigger problem than NIMBY

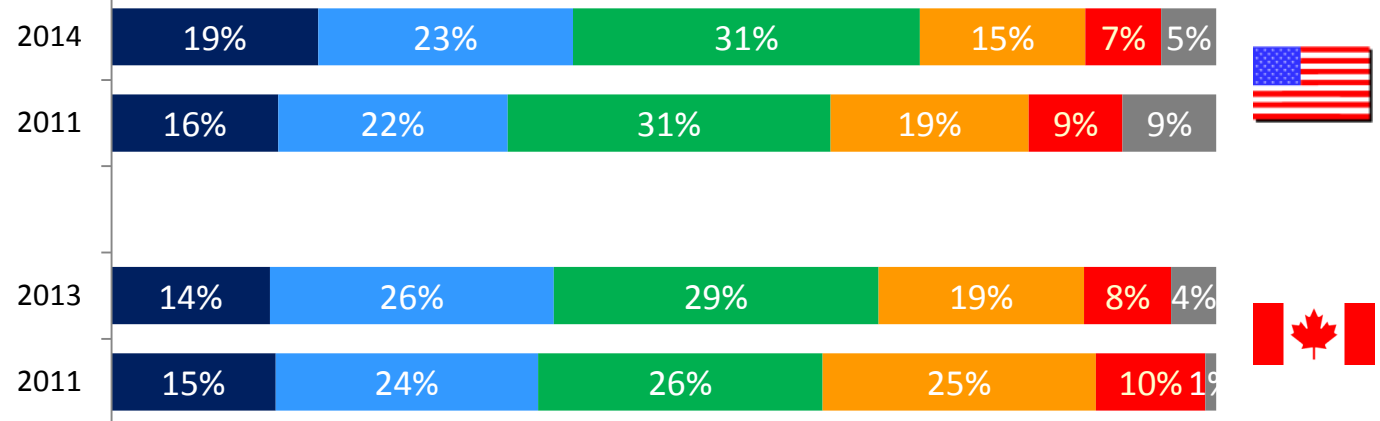


Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?

New industrial developments should be built as far away from existing neighbourhoods as possible



I like my neighbourhood the way it is, we don't need any new developments



■ Strongly agree
■ Somewhat disagree

■ Somewhat agree
■ Strongly disagree

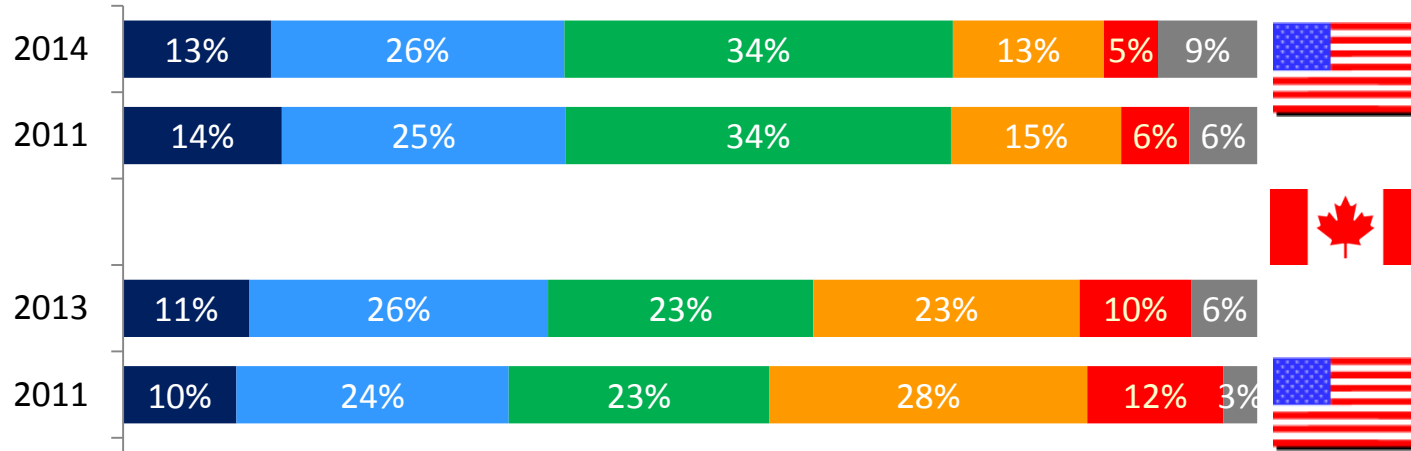
■ Neither agree nor disagree
■ Don't know

Public more pragmatic than some may expect

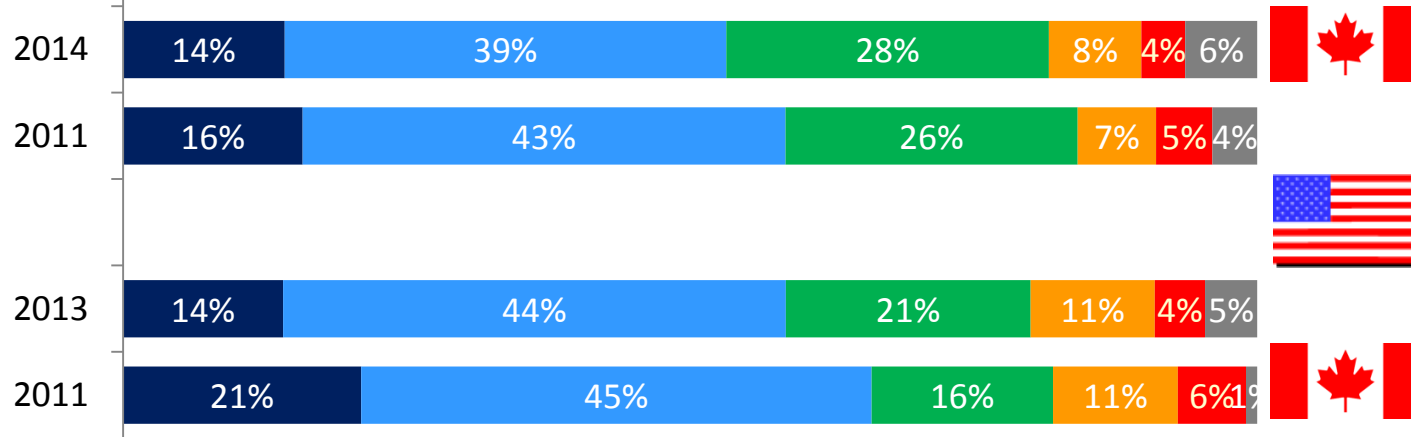


Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?

It's wrong to allow a major local land use development to go ahead while there are still some local leaders and residents opposed

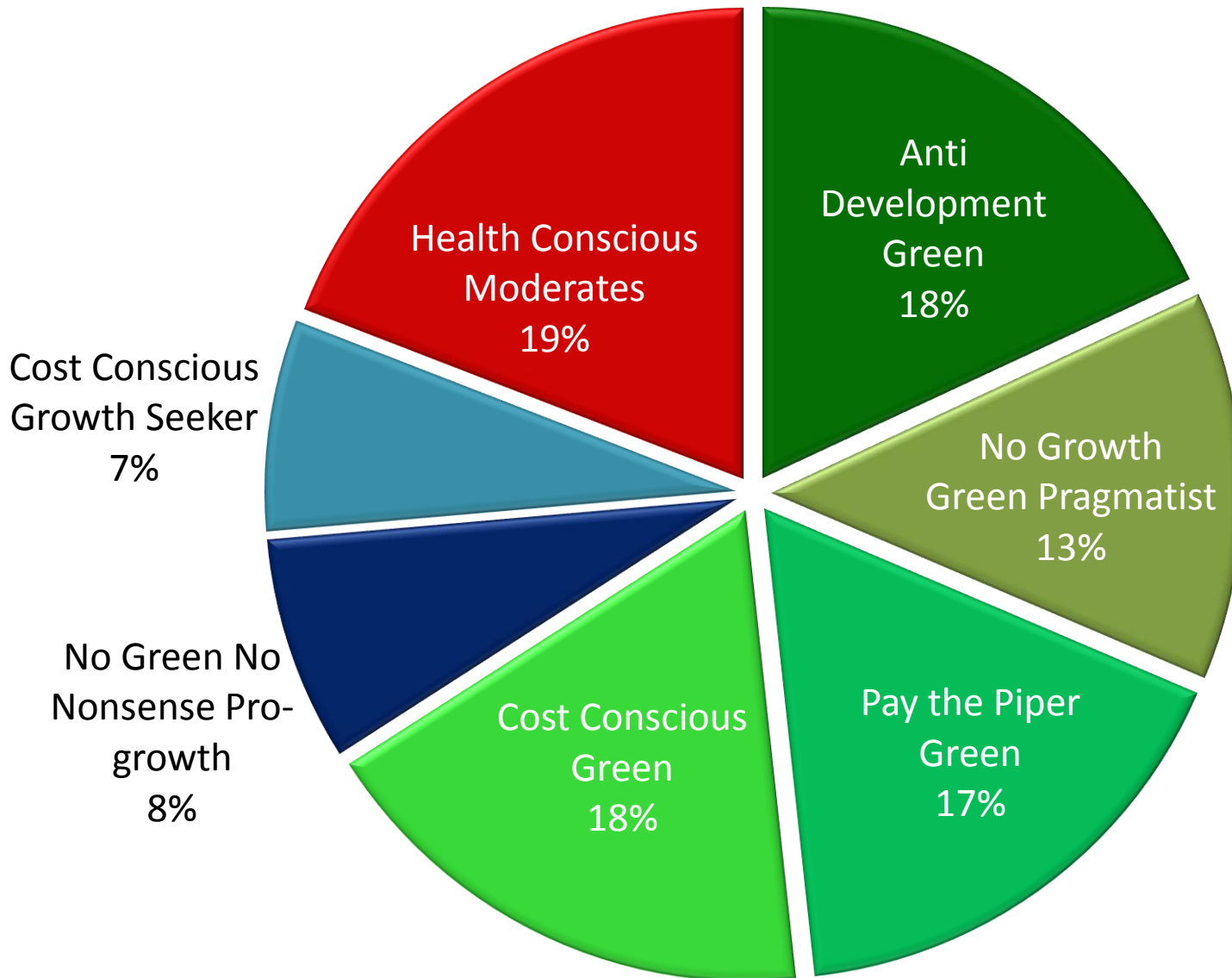


Sometimes some people have to be inconvenienced for the broader good



Strongly agree
 Somewhat agree
 Neither agree nor disagree
 Somewhat disagree
 Strongly disagree
 Don't know

The public is divided on fundamental choices; each segment has its own needs

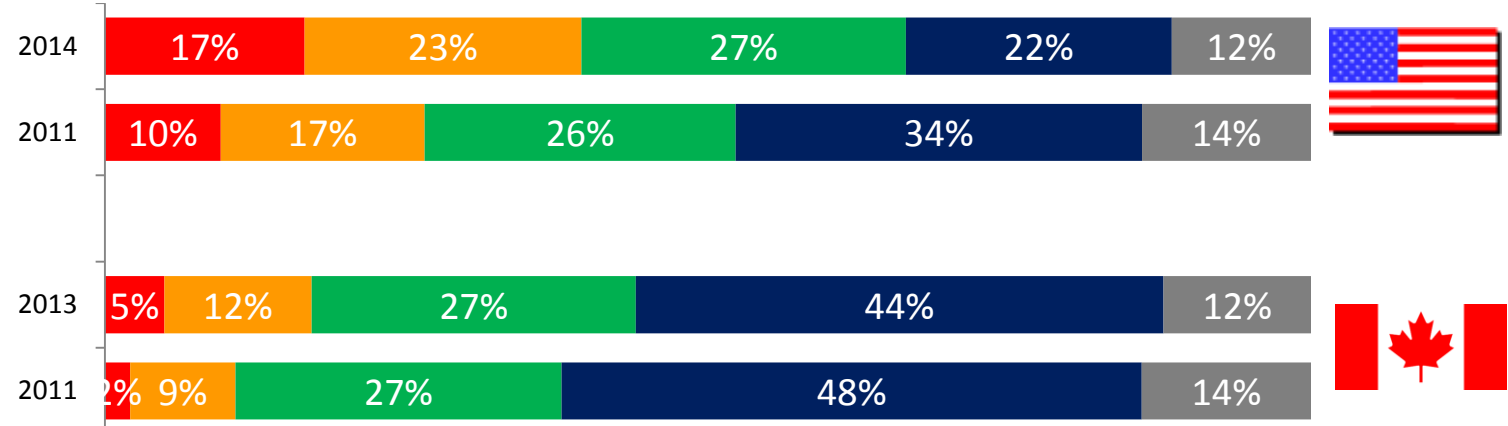


Problems

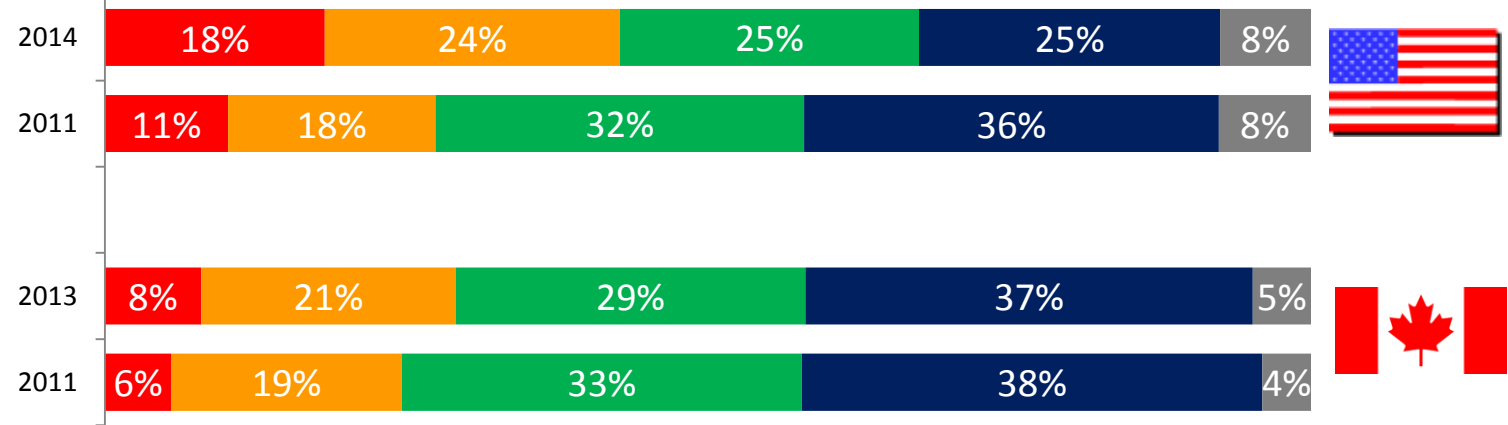
The specific challenge of energy reliability is more of an issue in the US than in Canada

Q Now we would like to ask you about a few problems that some communities are facing. Please tell me how urgent you feel each of the following problems are in your community

Maintaining a reliable supply of natural gas



Maintaining a reliable supply of electricity



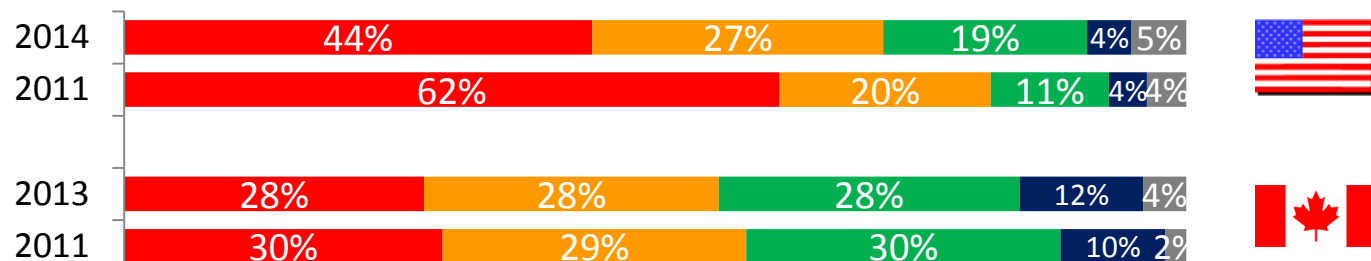
- A critical problem that requires immediate action
- A significant problem that needs to be dealt with soon
- Just one of many problems government should address
- Not really a problem
- Don't know

'Jobs' still lead as US concern, but Canada and the US are becoming more similar

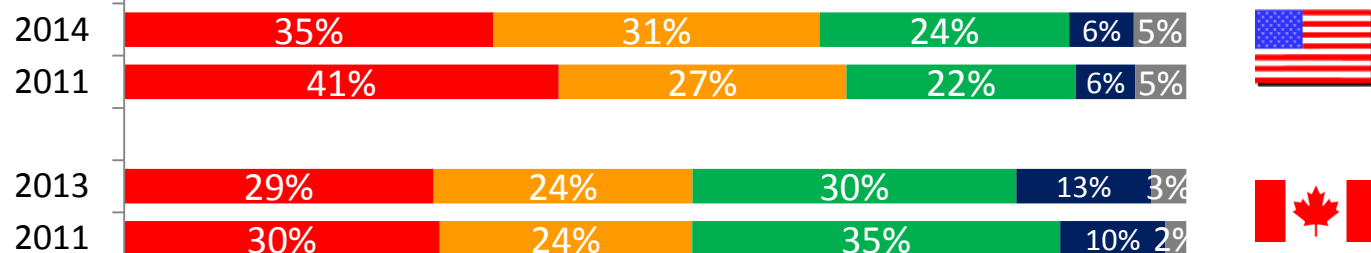
Q

Now we would like to ask you about a few problems that some communities are facing. Please tell me how urgent you feel each of the following problems are in your community

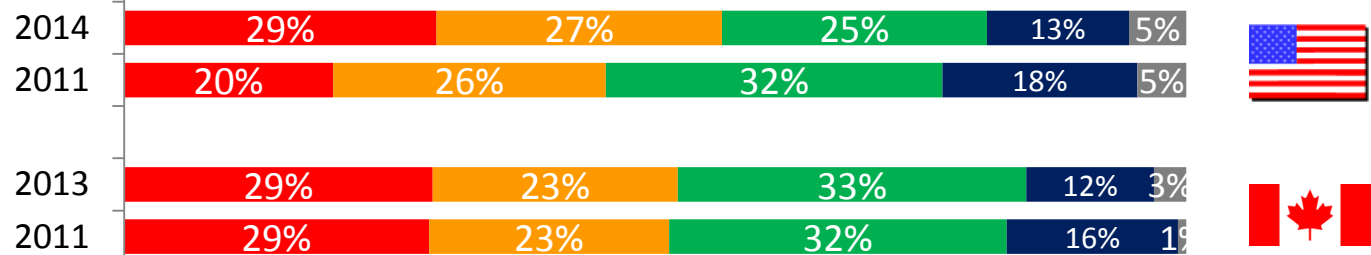
Creating jobs



Controlling increases in the cost of living



Protecting the environment



■ A critical problem that requires immediate action

■ Just one of many problems government should address

■ Don't know

■ A significant problem that needs to be dealt with soon

■ Not really a problem

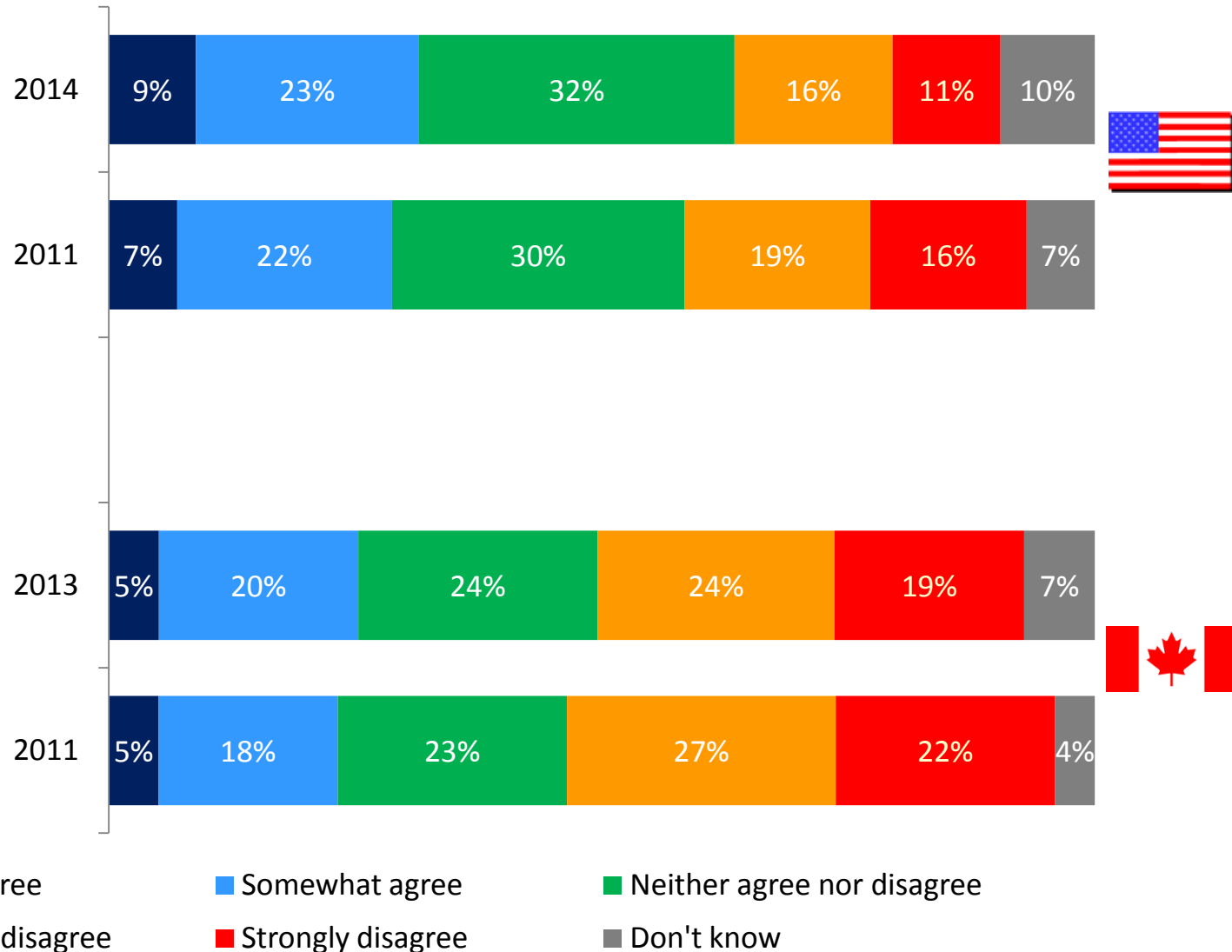
Process

Americans more trusting of regulatory process than Canadians, but both very ambivalent



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

Government and regulators in this state/province do a good job of protecting the public interest when they review the type of major developments we have been discussing in this survey



Five Things to Remember

1. Opinion is dynamic. It is the combination of fairly stable attitudinal anchors AND the winds of public debate.
2. There is no blank slate. Your audience has existing views that influence what they hear and what they think about that.
3. NIMBY is just part of the problem. NOPE, BANANA and 'Who liked the Electric Car' myths all limit the 'Persuadable Public'.
4. It's hard to sell a solution to an unperceived problem. Raising awareness of the problem you are solving is a critical priority from project start to finish.
5. Governments only provide permits, they do not have the credibility to provide permission. You must build that yourself.



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