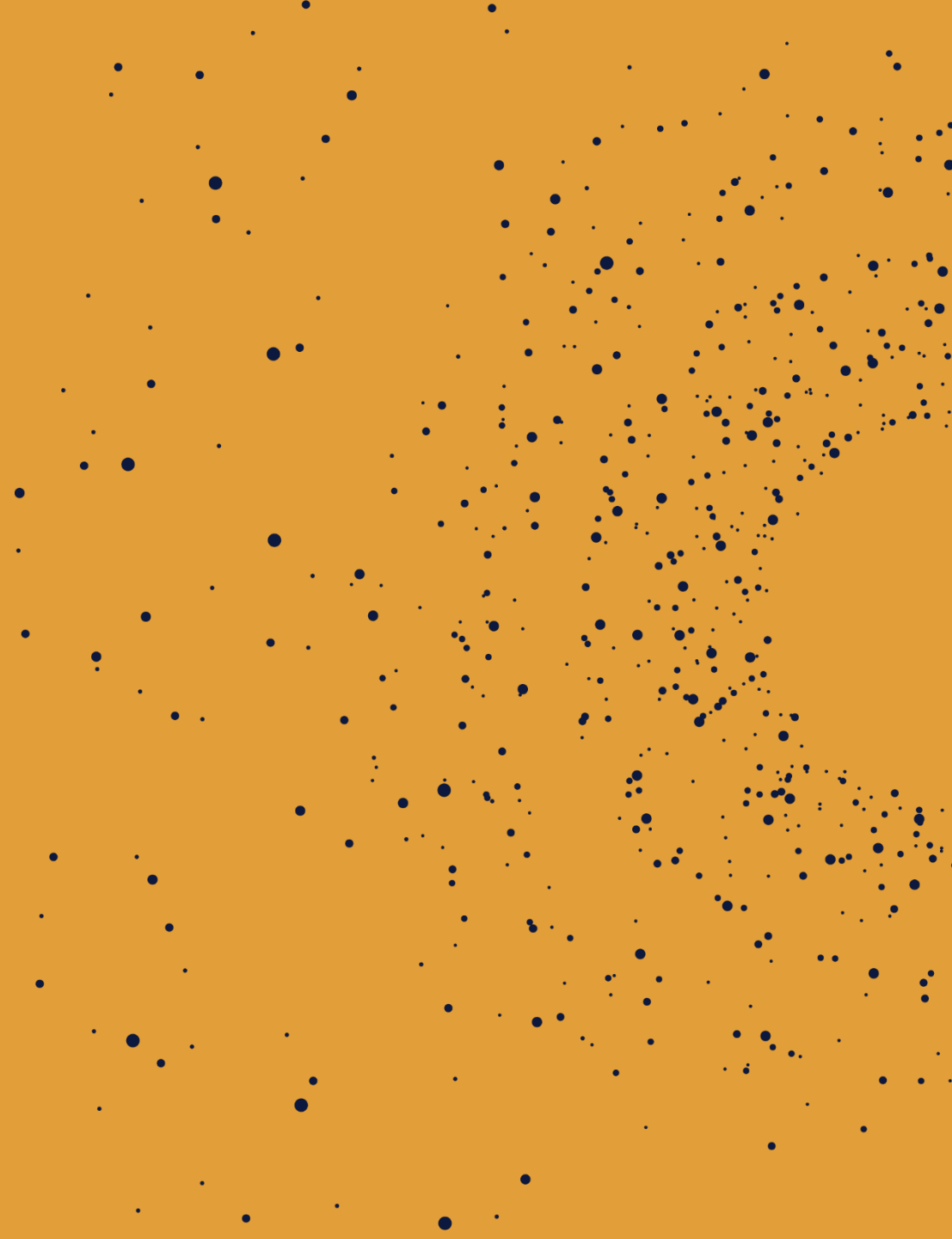




# De-Mystifying Social Permission Risks

# The Energy Transition



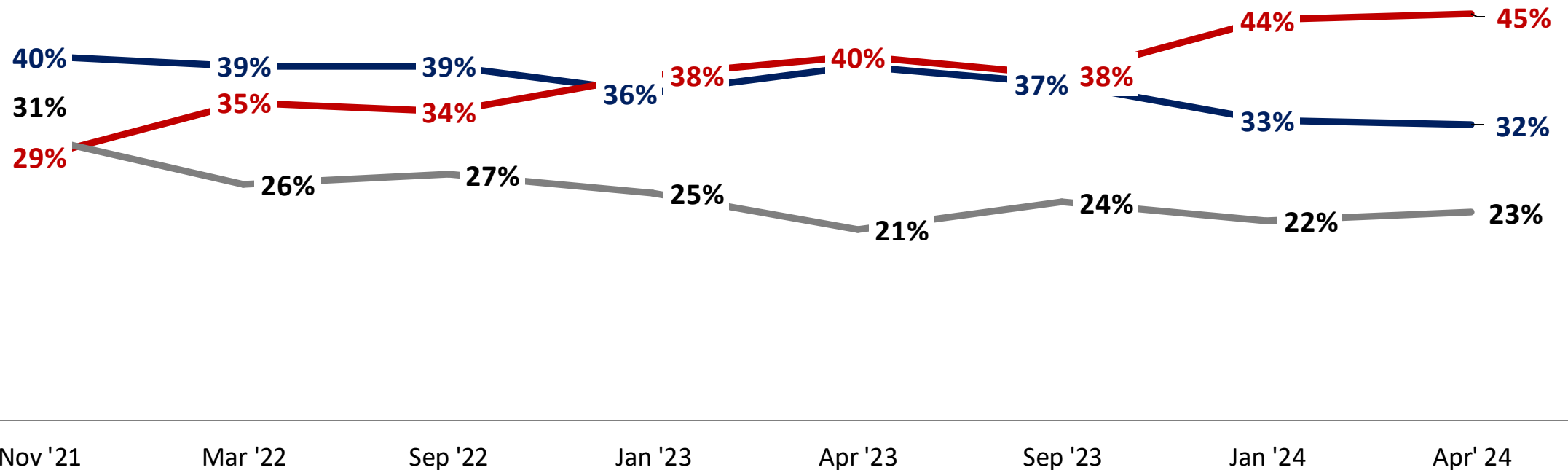
# Views on Government Energy Transition Policies – Tracking: Views on government’s policies are on par with January 2024



Based on what you know about an energy transition, which of the following statements is closest to your point of view?

[asked of all respondents; n=2,000]

- Government policies to accelerate the transition away from oil and gas show Canada is a leader on climate change and help make the world better for future generations.
- Government policies to accelerate the transition away from oil and gas risk increasing the cost of living and losing jobs in Canada, and aren’t likely to have a significant impact on climate change.
- Don’t know

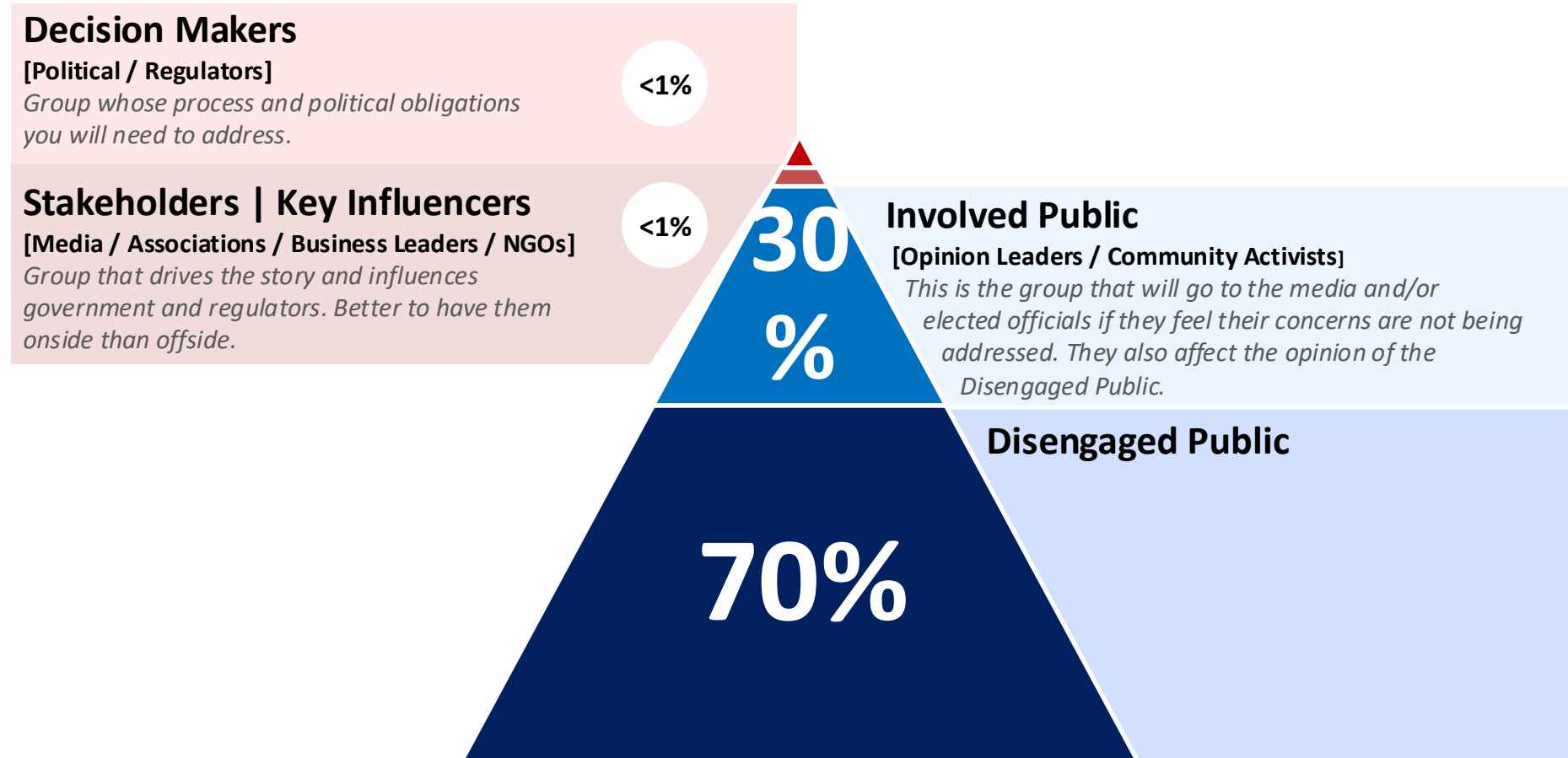


The Challenge of Building  
Things People Need, But  
Don't Like



# Audience Pyramid

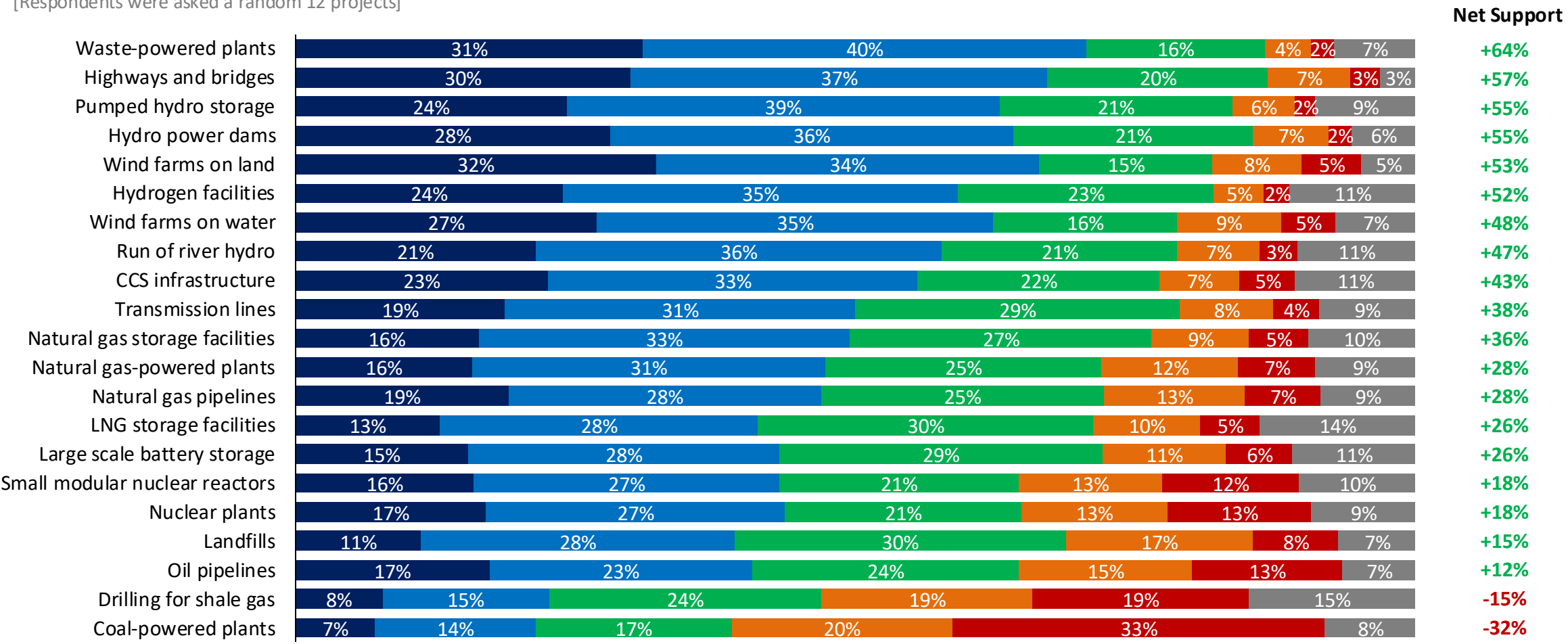
- What the public and customers think matters only if political and regulatory decision-makers care.
- However, decision-makers have an incentive to listen to and appear responsive to the public, especially during election periods.



# General Support: Net Support highest for waste-powered plants, highways and bridges and pumped hydro storage



Generally speaking, would your initial reaction be to support or oppose a proposal to build each of the following projects in your province?  
[Respondents were asked a random 12 projects]



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



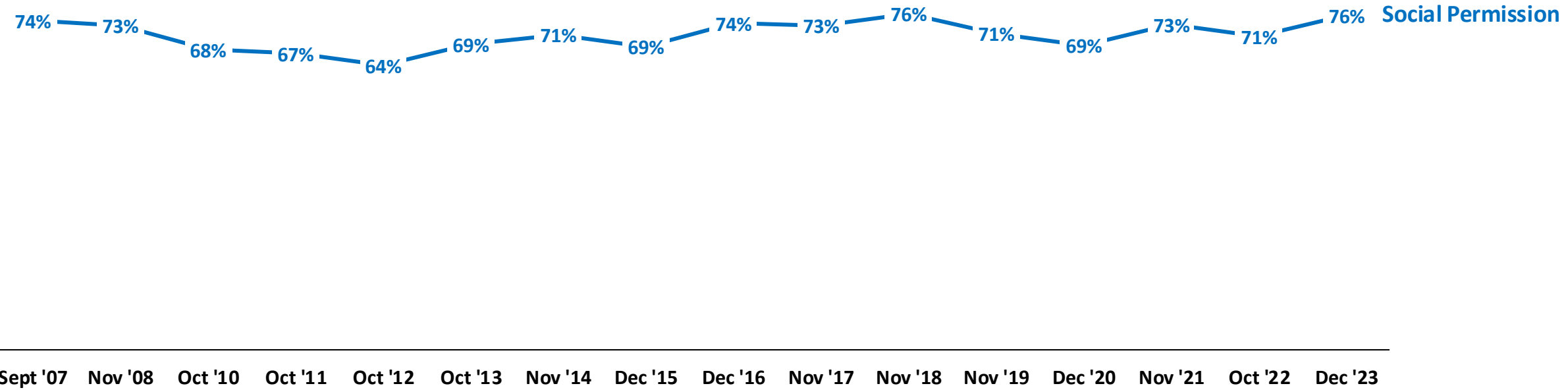
# Social Permission (Tracking): Social permission is relatively stable compared to the past few years; up 5 points from last year



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

[asked of those who selected a project 'closest' to their home, n=951]

[Social Permission = It's a good thing for the community and I support it + I don't like it but I think it is necessary]



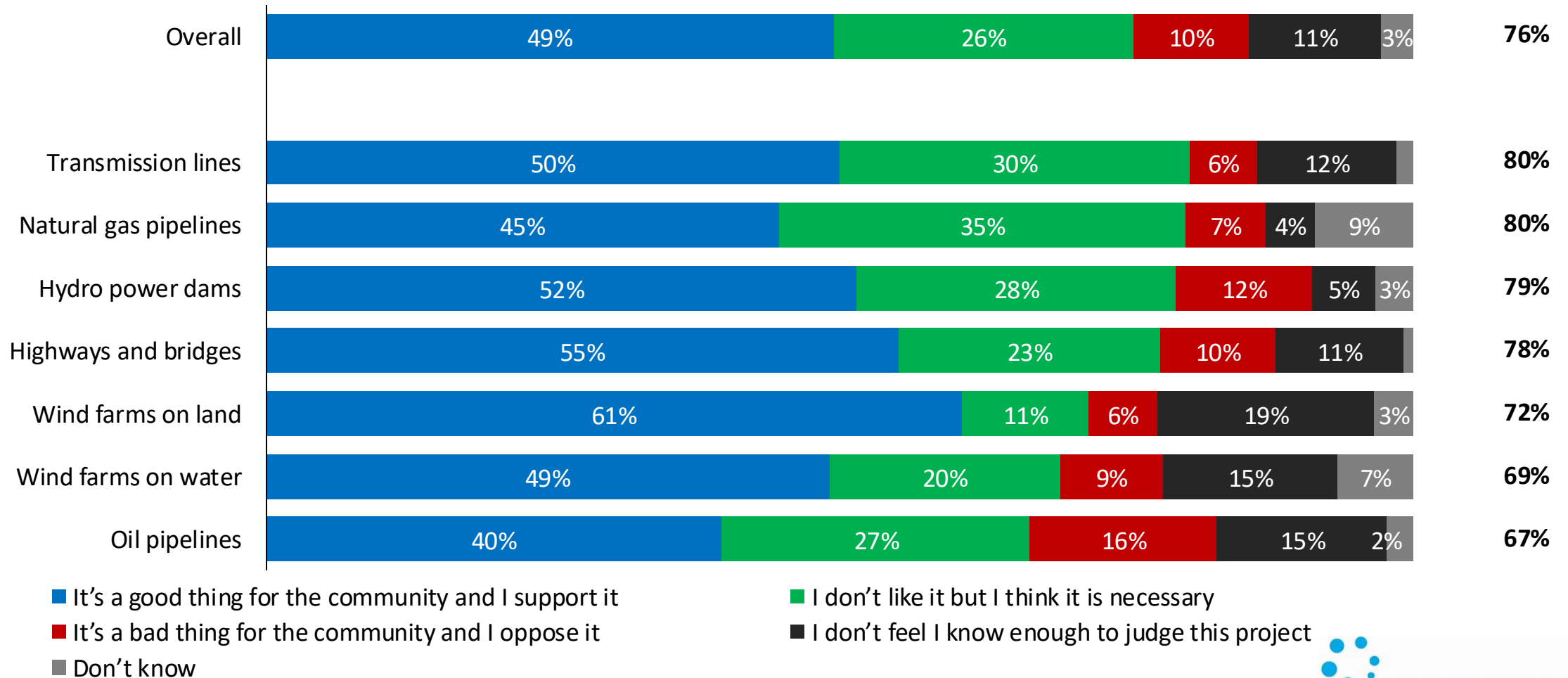
# Social Permission: A majority, 4-in-5, give social permission when it comes to transmission line and natural gas pipeline projects



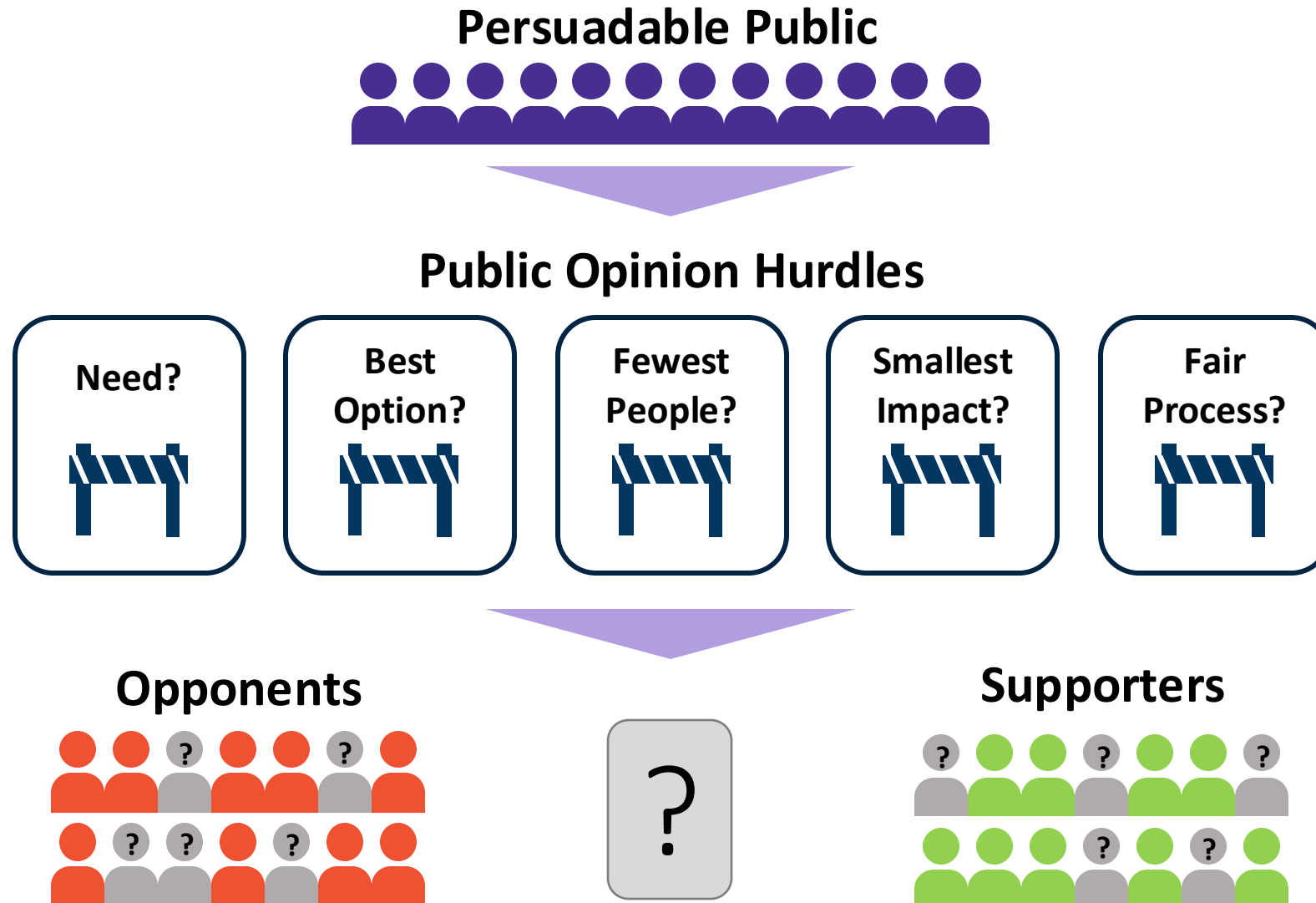
Which of the following best represents your view of that project?

[asked of those who selected a project 'closest' to their home, n=951]

**Social Permission  
(Good thing +  
necessary)**





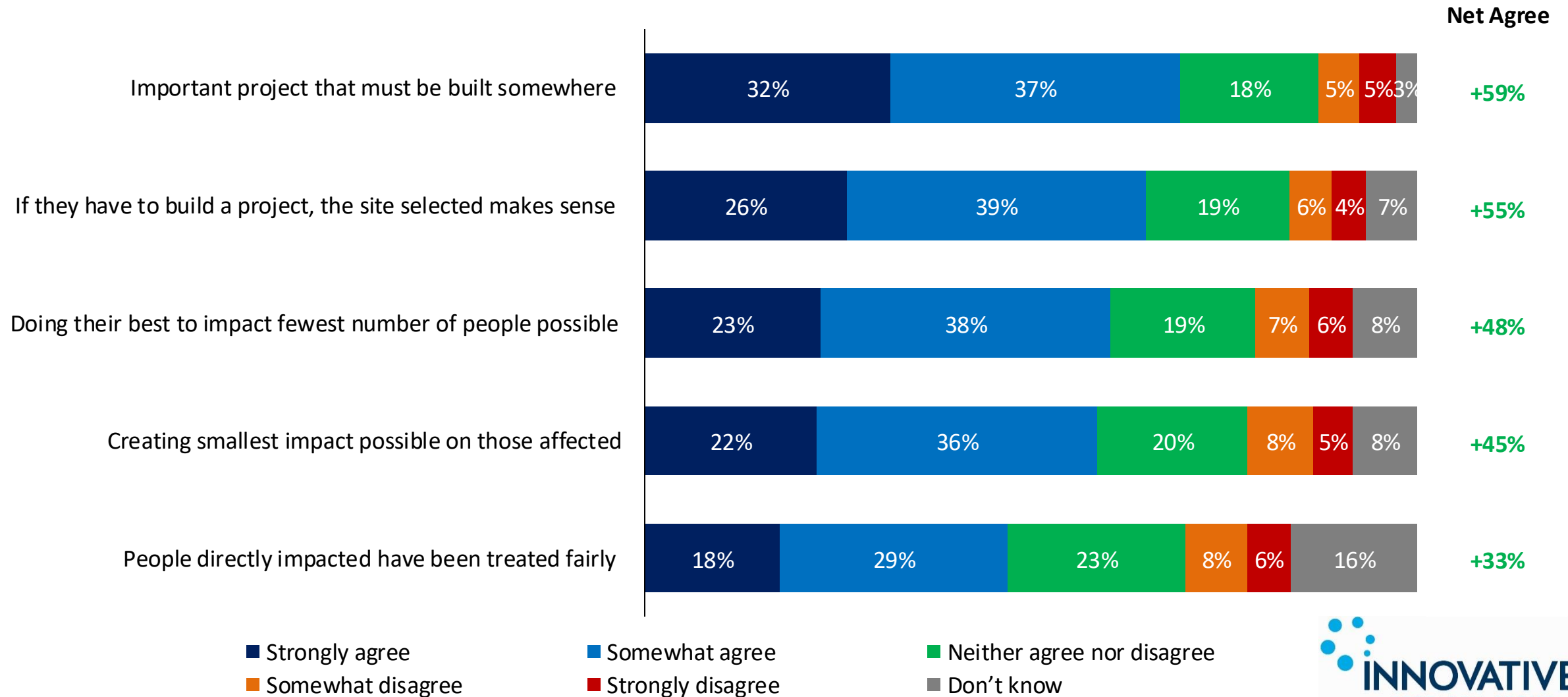


# The Hurdles: Agreement is highest on 'important projects must be built somewhere' followed by 'selected site makes sense'



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

[asked of those who selected a project as 'closest' to their home, n=951]

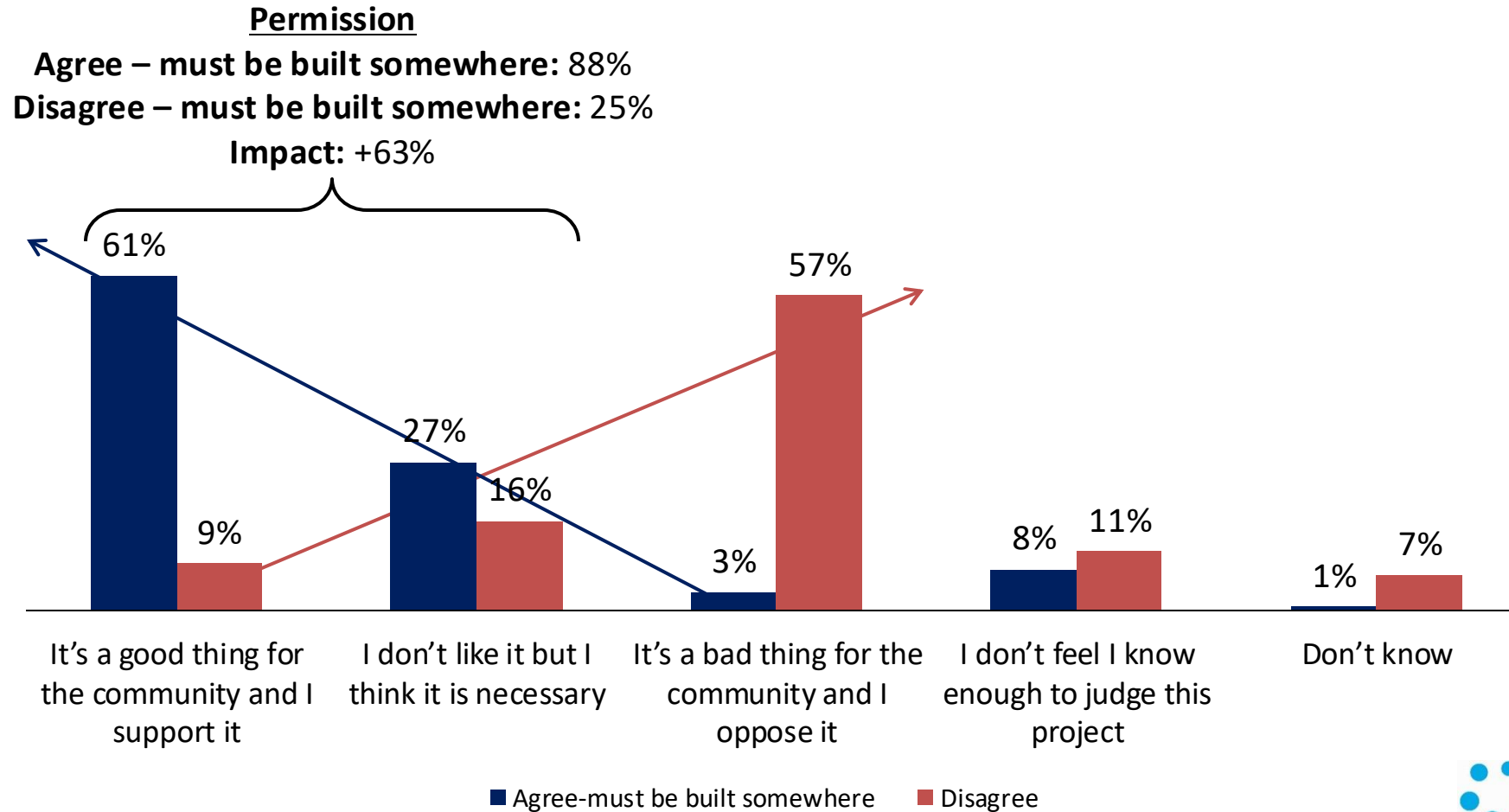


# Need?:

## If you don't feel the project is needed, you don't support the project



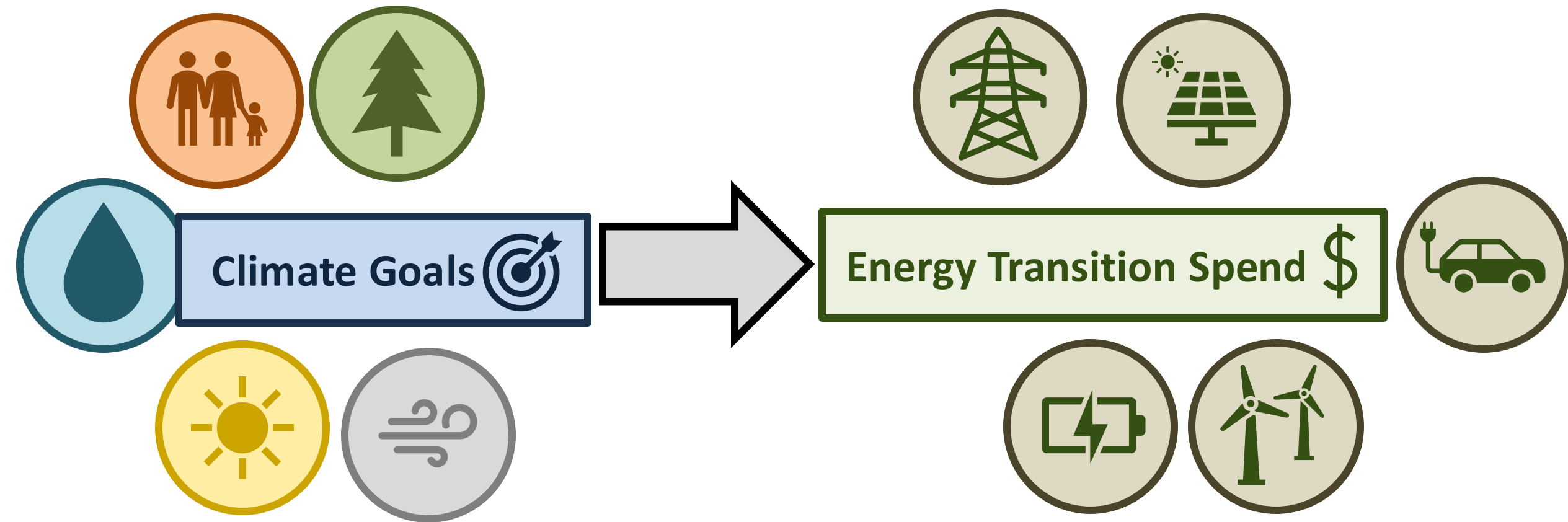
'Which of the following best represents your view of that project' **BY** 'This is an important project that has to be built somewhere'  
[asked of those who selected a project 'closest' to their home, n=951]



# The Challenge of Paying for Transition



# Energy Transition Math Theory



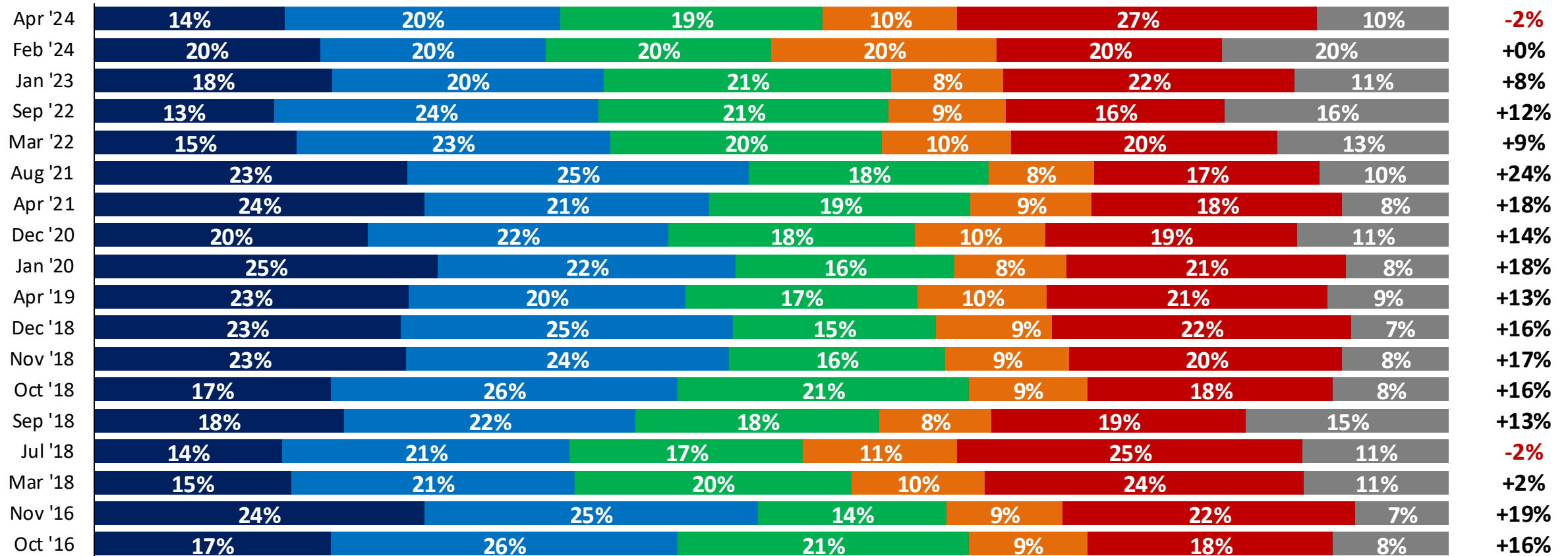
# General Support for Carbon Tax Tracking: Net support for a carbon tax continues a downward trend since September 2022<sup>14</sup>



Do you support or oppose the federal government implementing the following policy? **Establish a national minimum price for carbon and, in provinces that fail to meet that national minimum price, the federal government will introduce a carbon tax in that province where the money raised by that tax is returned to that provincial government.**

[asked of all respondents; n=1,000]

Net Support



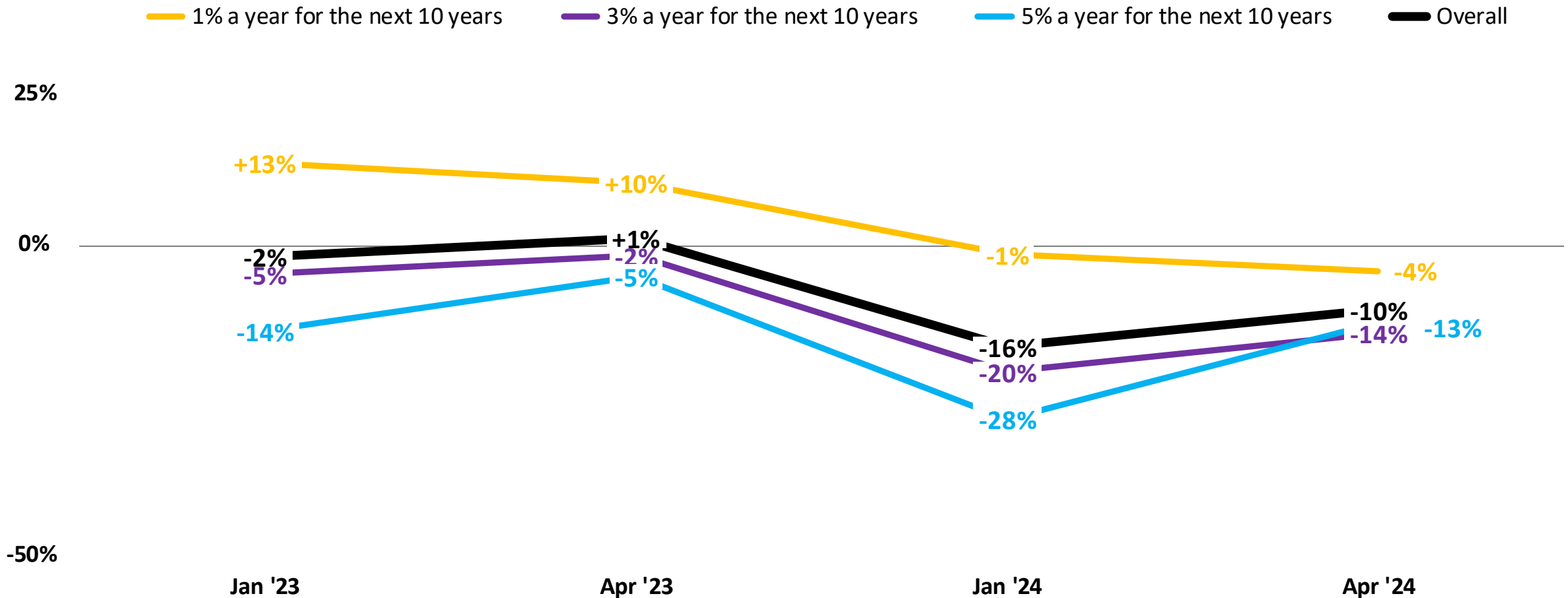
■ Strongly support     
 ■ Somewhat support     
 ■ Neither support nor oppose  
■ Somewhat oppose     
 ■ Strongly oppose     
 ■ Don't know

# Electrification Pricing – NET Support Tracking: Support for electricity price increases up 16 points for 5% increase

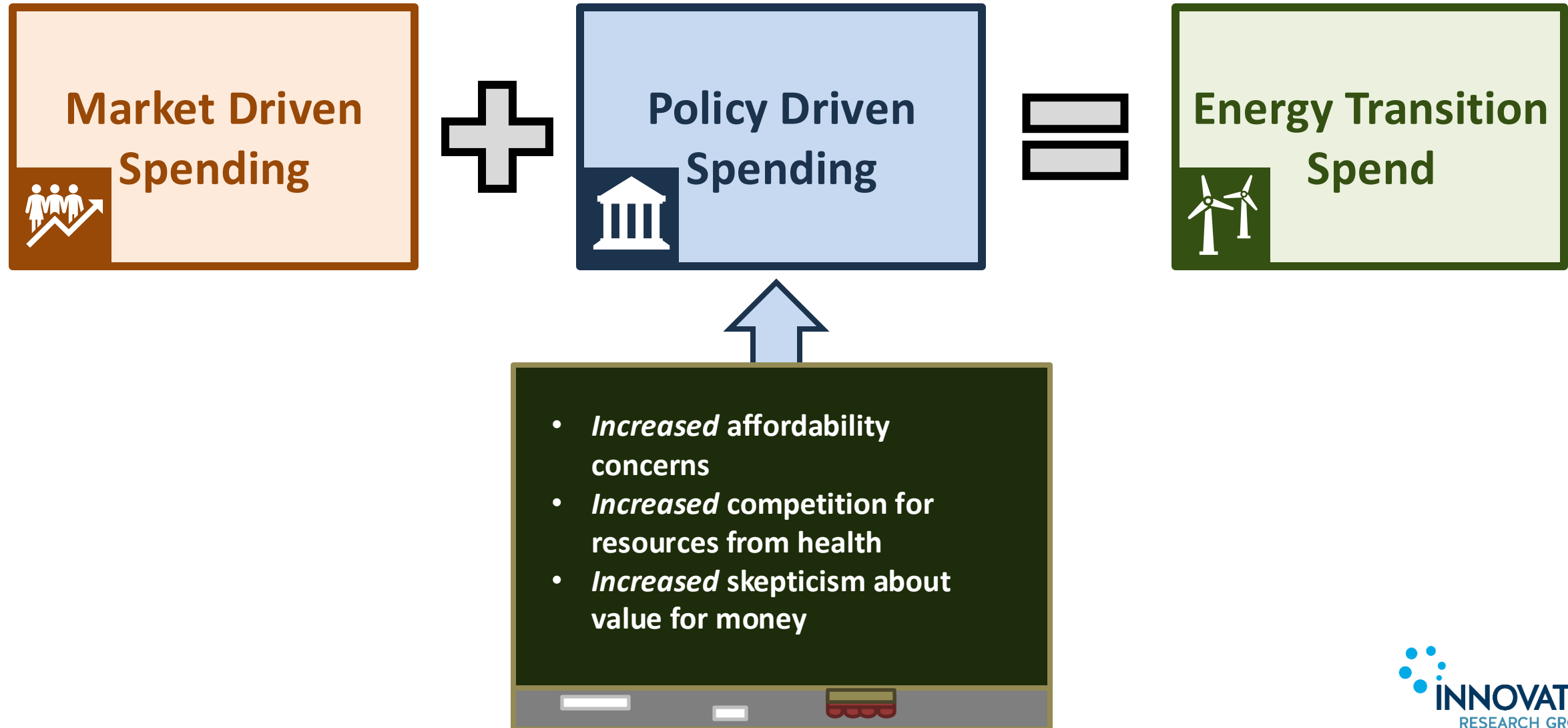


Electricity prices will have to rise to pay for expanding the electricity grid with non-emitting generation. You might be able to offset some of these costs by reducing the amount of automotive fuel or home heating fuel you currently purchase. The more we pay in electricity rates, the quicker we can implement the energy transition. Do you support or oppose investments to enable electrification, if in addition to routine increases, your electricity bill will grow by:

[asked of all respondents; n=1,000]



# Energy Transition Math Reality





# Four Things to Remember

- 1 Political pressure to act on climate change is slipping.**

Canadians are still concerned about climate change, but they question where the sacrifices are worth the impact.

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- 2 Willingness to pay cannot be taken for granted.**

On electricity projects, willingness to pay is a key constraint and unlikely to decline. To build support, the sector must demonstrate need and value for money.

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- 3 The roadmap for building things is clear.**

While failures dominate the headlines, most real world projects enjoy social permission

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- 4 Looking ahead, climate change likely to be secondary to affordability and health**

Climate change has shifted from a Liberal wedge to a CPC wedge.

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**Building Understanding.**

