



Social License: BC Public's Perceptions & Expectations

Triton Environmental

- Employee-owned, incorporated in 1989
- 6 strategic locations in Western Canada



Social License

Local community's acceptance or approval of a company's project or ongoing presence in an area



Social License

Local community's acceptance or approval of a company's project or ongoing presence in an area

- Study Purpose
 - Gain insights on Social License
 - BC public's role and feelings around Social License
 - How can project proponents and consultants achieve Social License?

Focus Areas

1. Public Awareness

How informed is the public about projects across the province?



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2. Support & opposition

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3. Drivers of public opinion

What factors most impact support versus opposition for a project?



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3. **Drivers of public opinion**

What factors most impact opposition versus support for a project?

4. **Planning and approval**

What aspects in the process of planning, approving, and delivering large scale energy projects are considered most important by the public?

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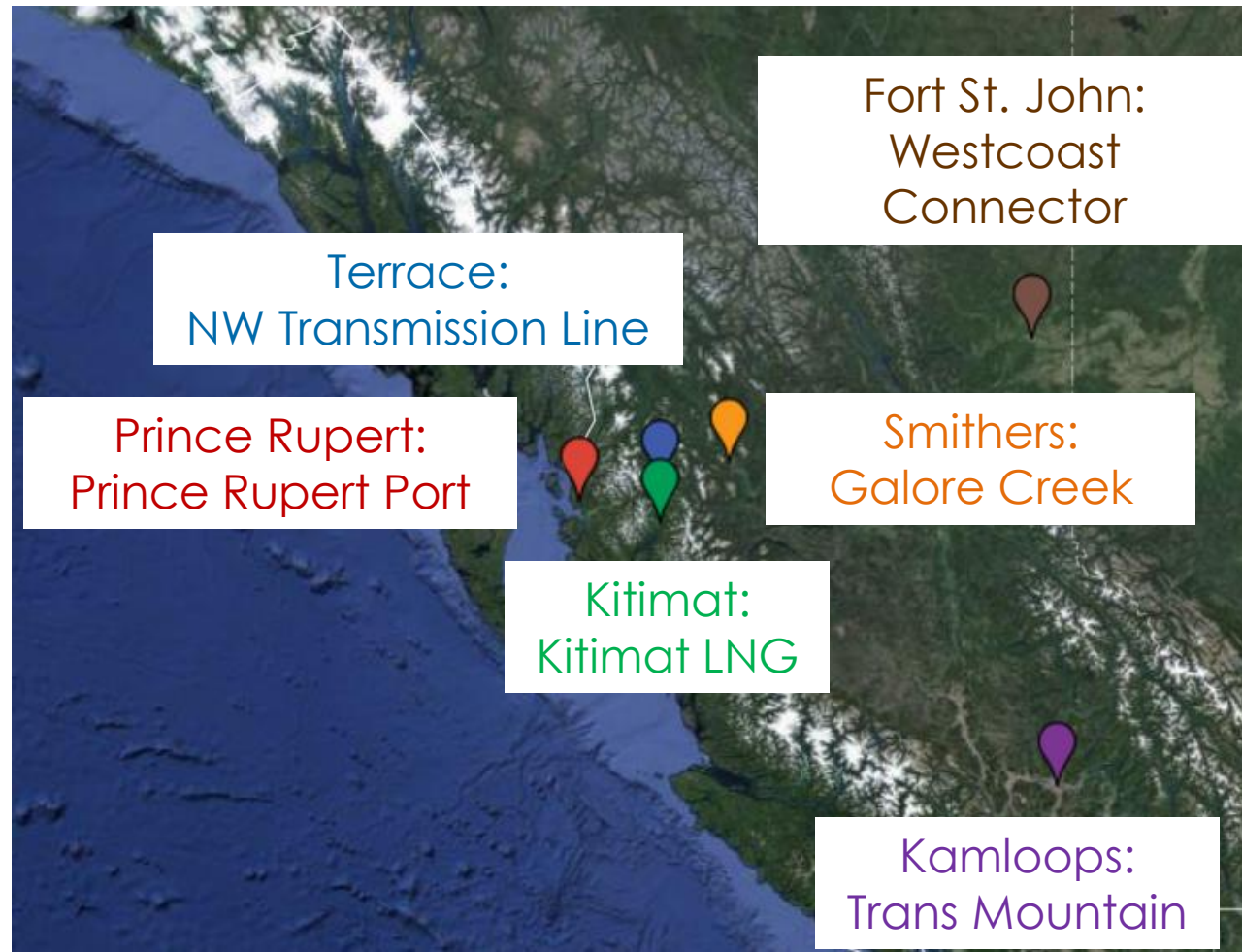
What aspects in the process of planning, approving, and delivering large scale energy projects are most important for the public?

5. **Impact of consultants**

How much does where consultants originate from impact public perceptions?

Survey Methods

- Concerto Research
 - phone survey
- 1,001 BC residents (random)
 - Lower Mainland
 - 6 Project Communities
 - Rest of BC



Survey Methods

- Sample stratified
 - Representation from 3 key regions
- Sample weighted
 - Results proportionate to population levels

Region	Completed Surveys	Unweighted Proportions	Weighted Proportions
Project Communities	600	59.9	4.3
Lower Mainland	154	15.4	68.4
Rest of BC	247	24.7	27.3
BC Wide	1001	100.0	100.0

Survey asked about energy projects:



**NORTHERN GATEWAY
PIPELINE PROJECT**



**BC HYDRO
SITE C**



**KINDER MORGAN TRANS MOUNTAIN
PIPELINE EXPANSION**

1. Public awareness of large-scale energy projects in BC

- How aware or informed are the public on:



**NORTHERN GATEWAY
PIPELINE PROJECT**



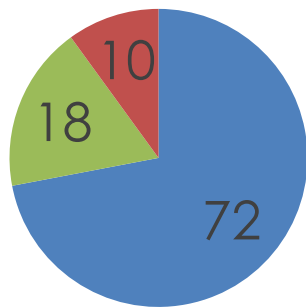
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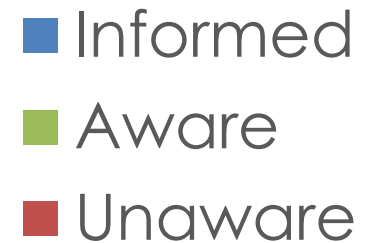
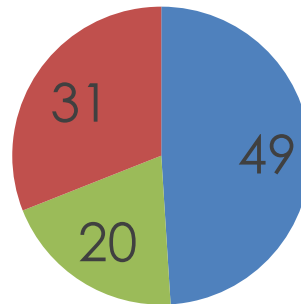
**KINDER MORGAN TRANS MOUNTAIN
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How informed is the public about projects across BC?

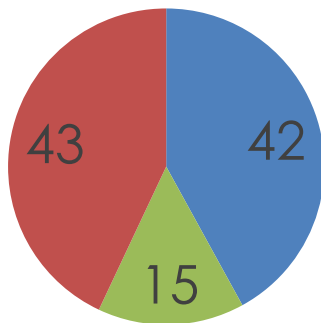
Enbridge Northern Gateway



Kinder Morgan Trans Mountain

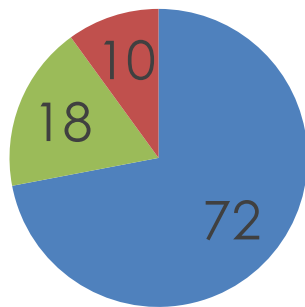


BC Hydro Site C

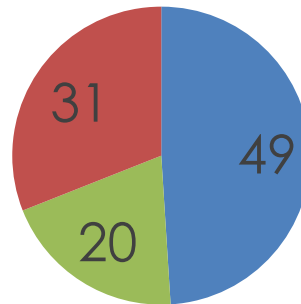


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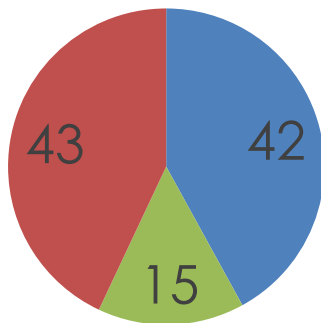


Kinder Morgan Trans Mountain



■ Informed
■ Aware
■ Unaware

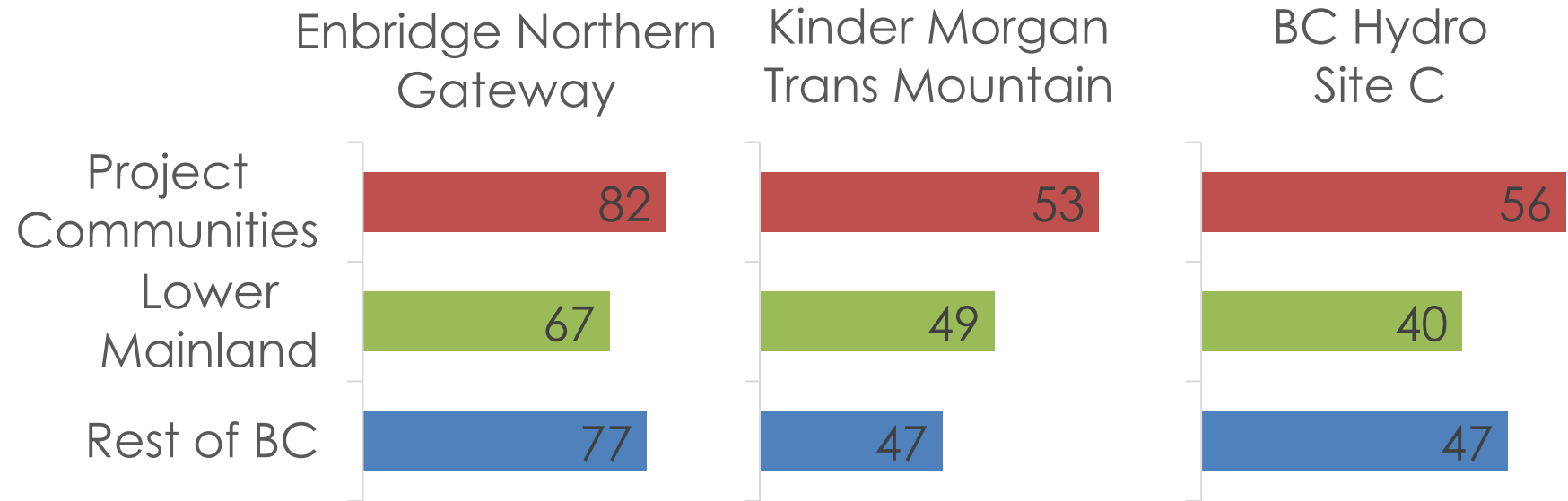
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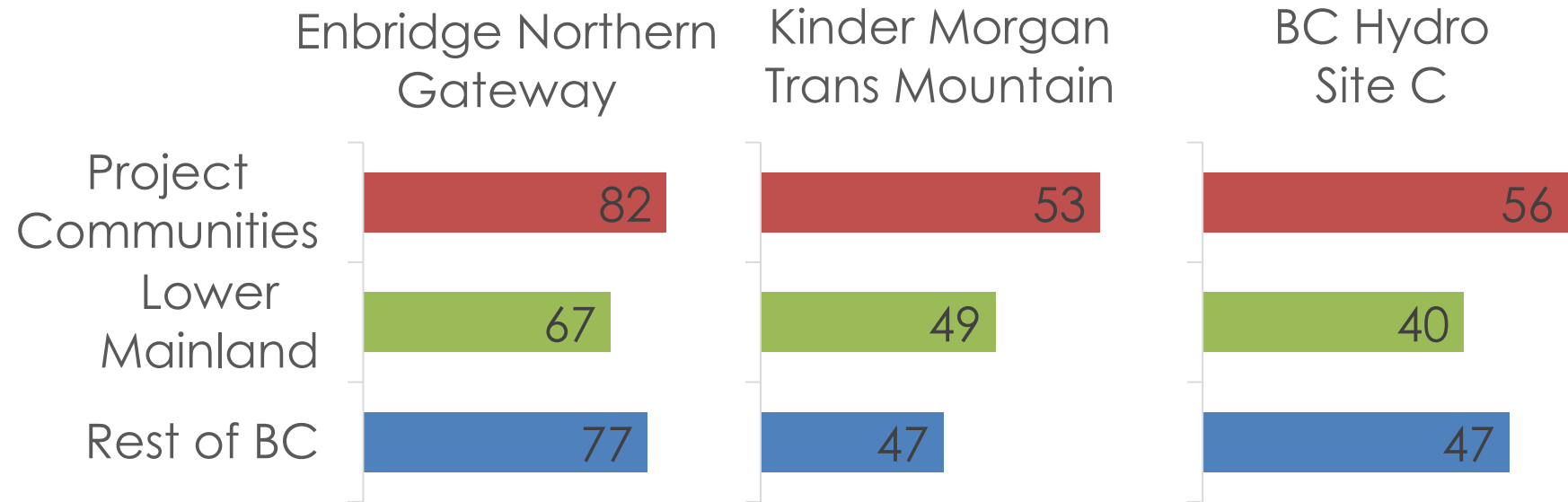
Very few people
consider themselves
“very well informed”

“somewhat informed”

Which communities are most informed of projects?



Which communities are most informed of projects?



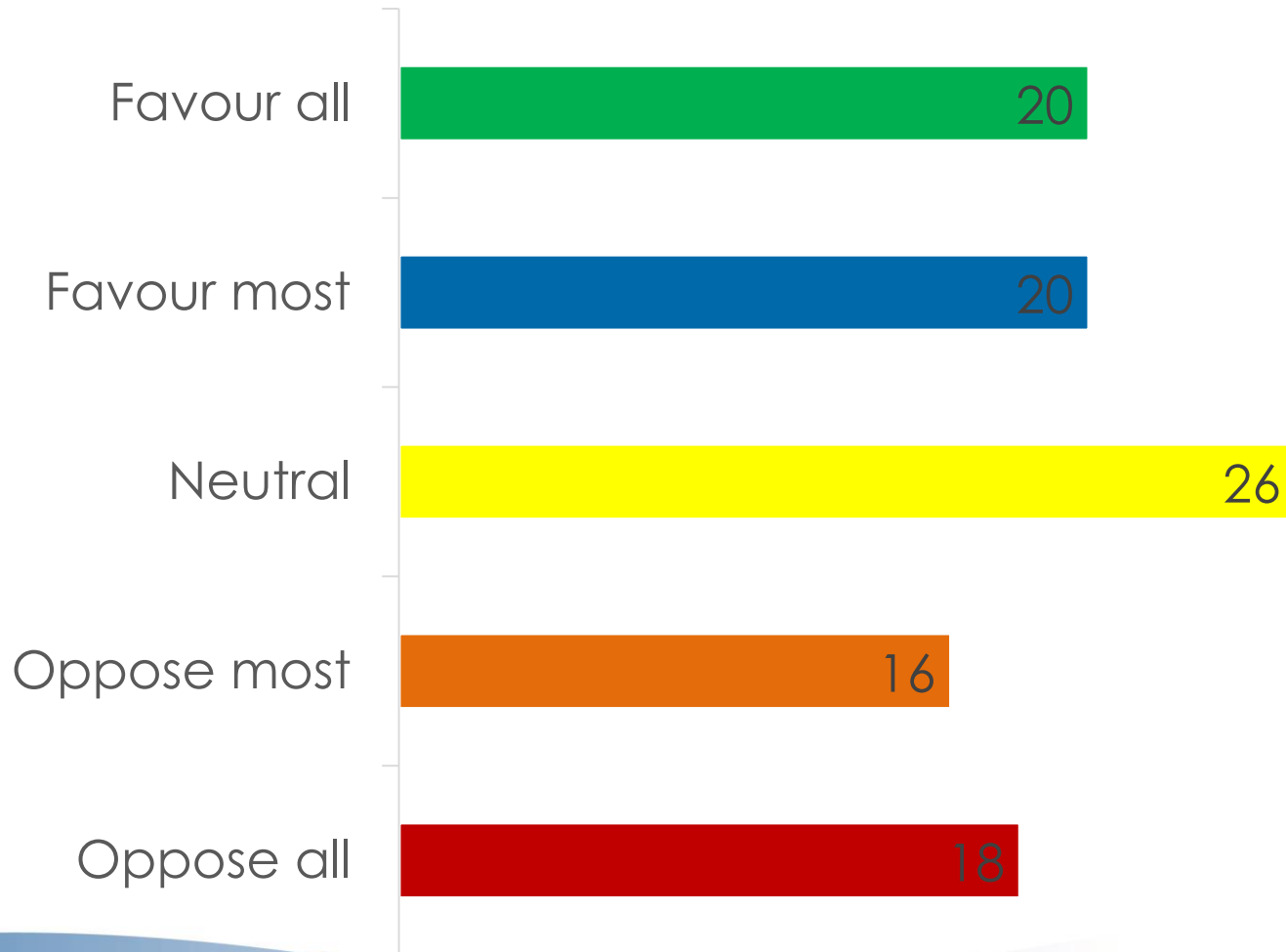
- Project Communities are most informed
 - Higher levels of awareness and understanding than general public
- Lower Mainland is least informed

2. Support and opposition of large-scale energy projects in BC

- How does the public feel about large-scale energy projects?

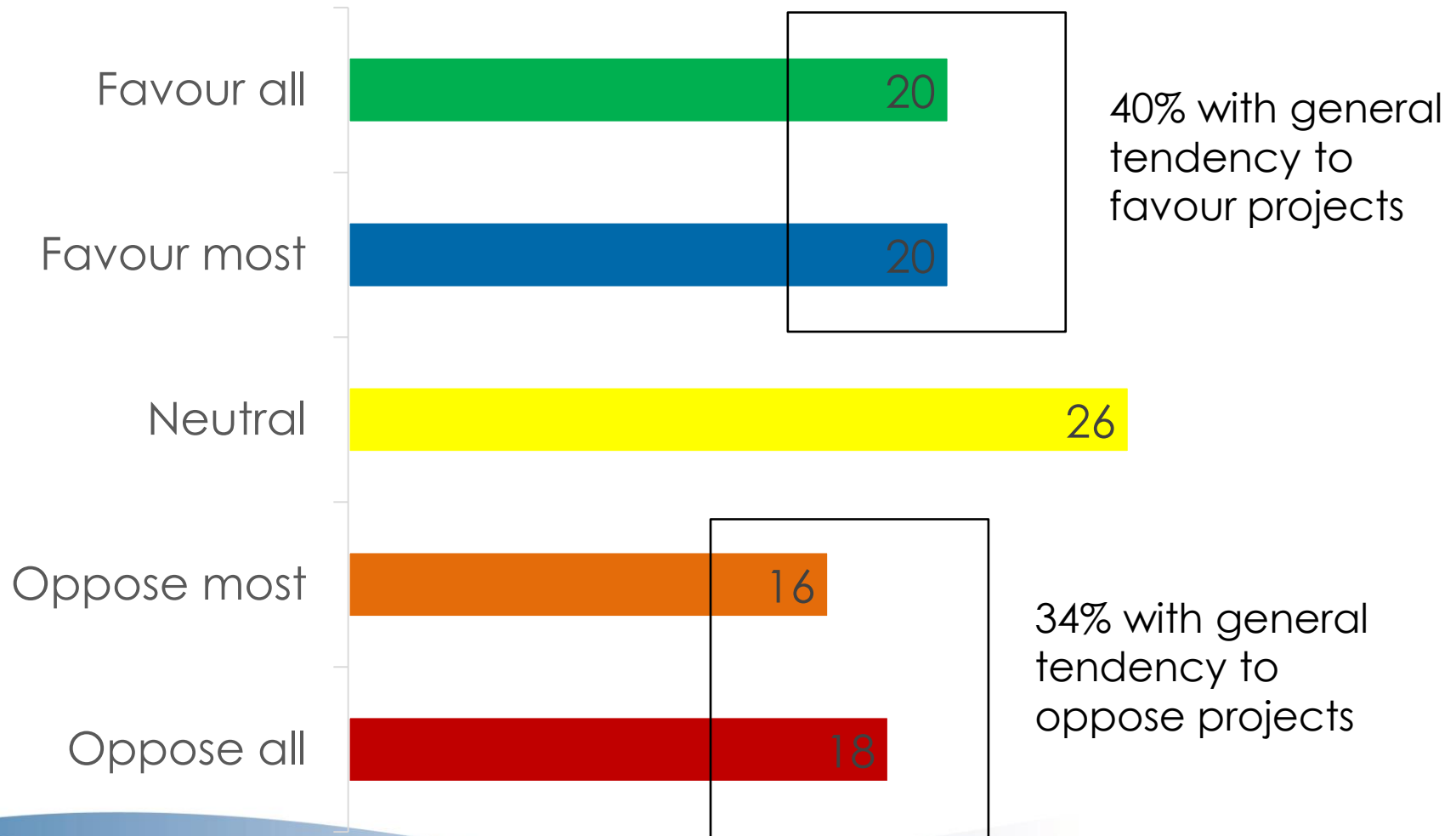


Where does the public stand on large-scale energy projects?



BC WIDE

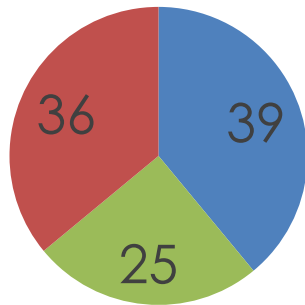
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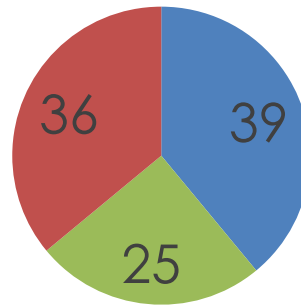
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How does the public feel about key energy projects?

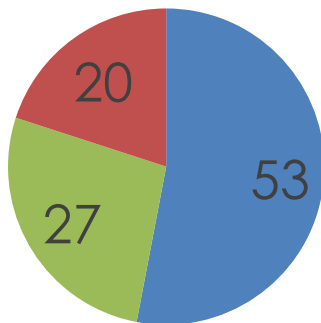
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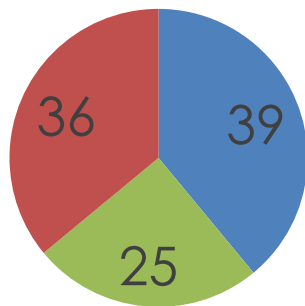


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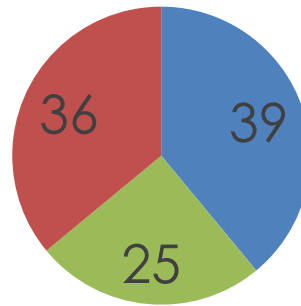


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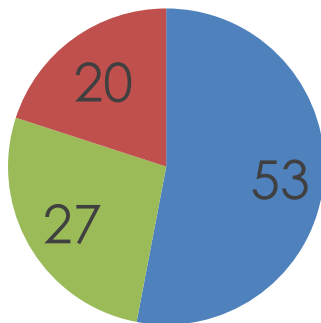


Kinder Morgan Trans Mountain



■ Favour
■ Neither
■ Opposed

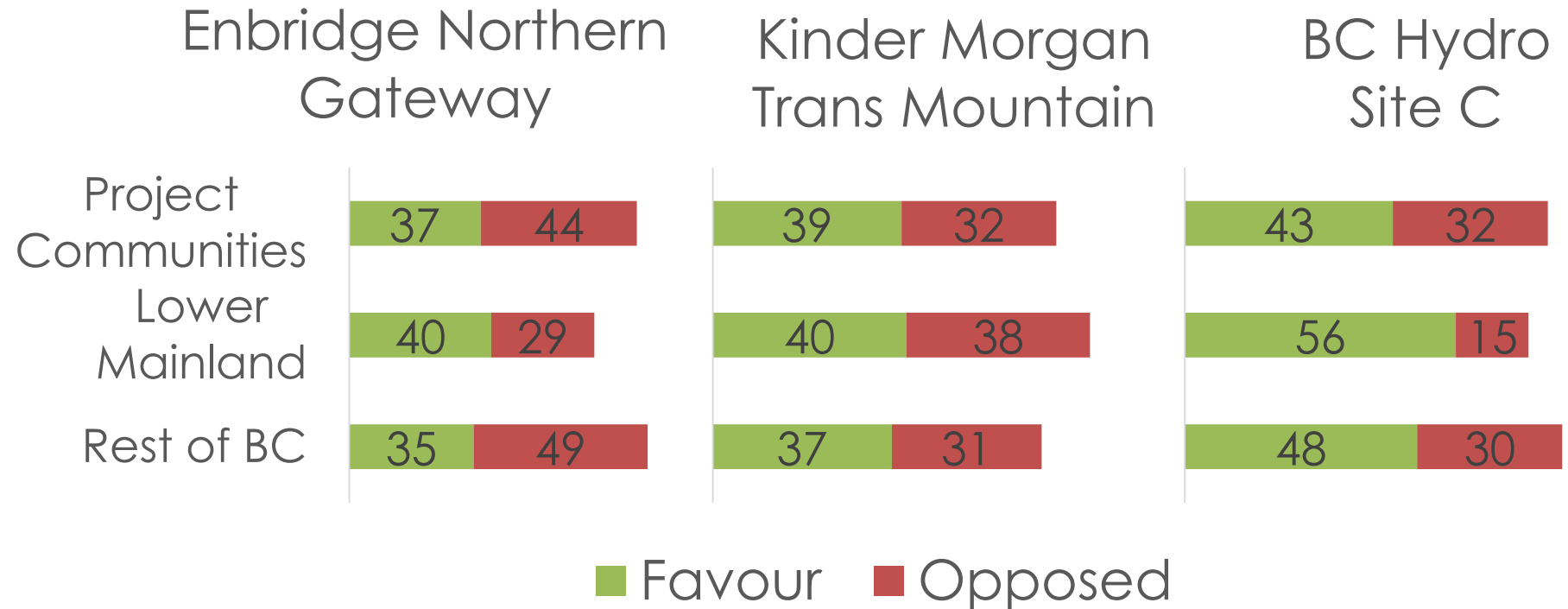
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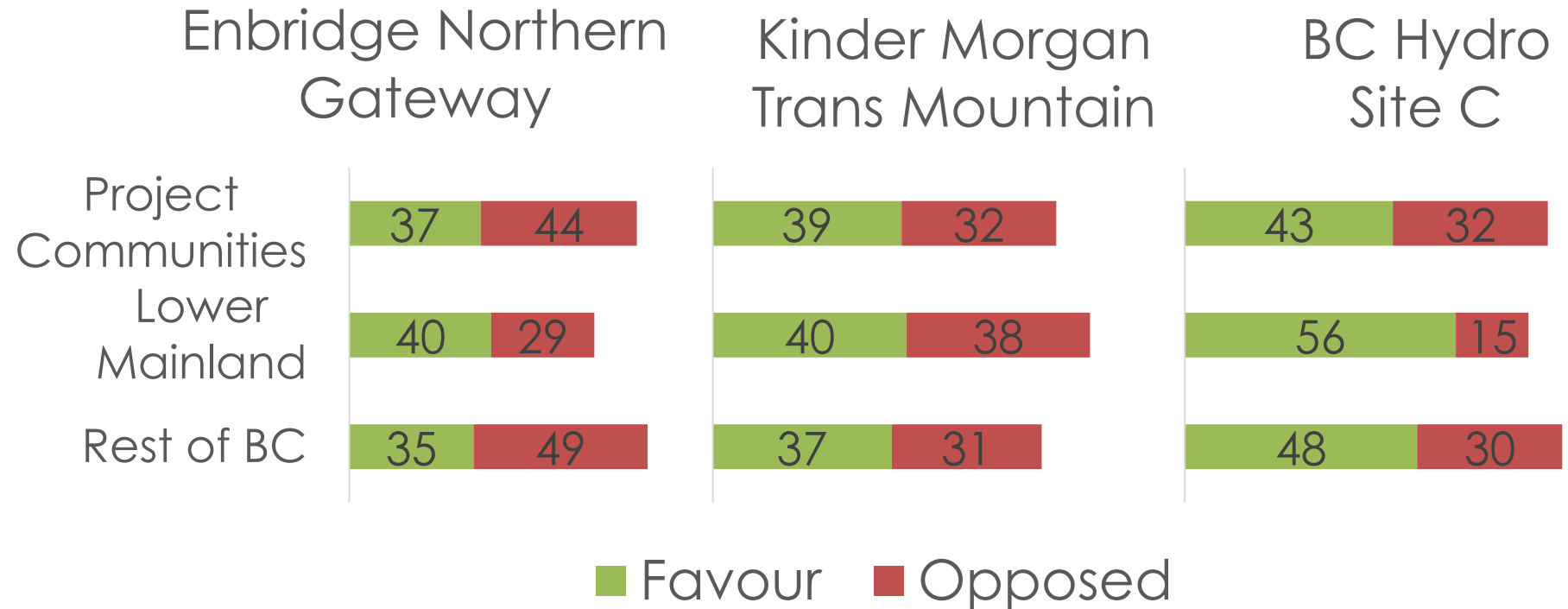
Even split between those in favour and opposition for Northern Gateway and Trans Mountain

Most support for Site C

Which communities are more opposed or in favour of projects?



Which communities are more opposed or in favour of projects?



More support than opposition in all communities

Except Northern Gateway - only LML has majority in support

3. Drivers of public opinion towards large-scale energy projects in BC

- Which factors drive public support or opposition to large-scale energy projects?



Drivers of support or opposition



“Economic benefits”

Main reason to favour project

“Environmental impact”

Main reason to oppose project



Drivers of support or opposition



“Economic benefits”

Main reason to favour project

“Environmental impact”

Main reason to oppose project



“Safety and well-being of people in local community could be affected”

- Most significant factor driving public support or opposition

4. Planning and approval stage for large-scale energy projects in BC

- Public views on which aspects are important in the process of planning, approving and delivering large-scale energy projects

What aspects in planning and approval are most important?

1. Strong leadership and oversight
 - Transparency, respect for regulations, ethics

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 - Early in development process



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3. Providing communication channels for individuals and groups
 - Ask questions and share their views and concerns

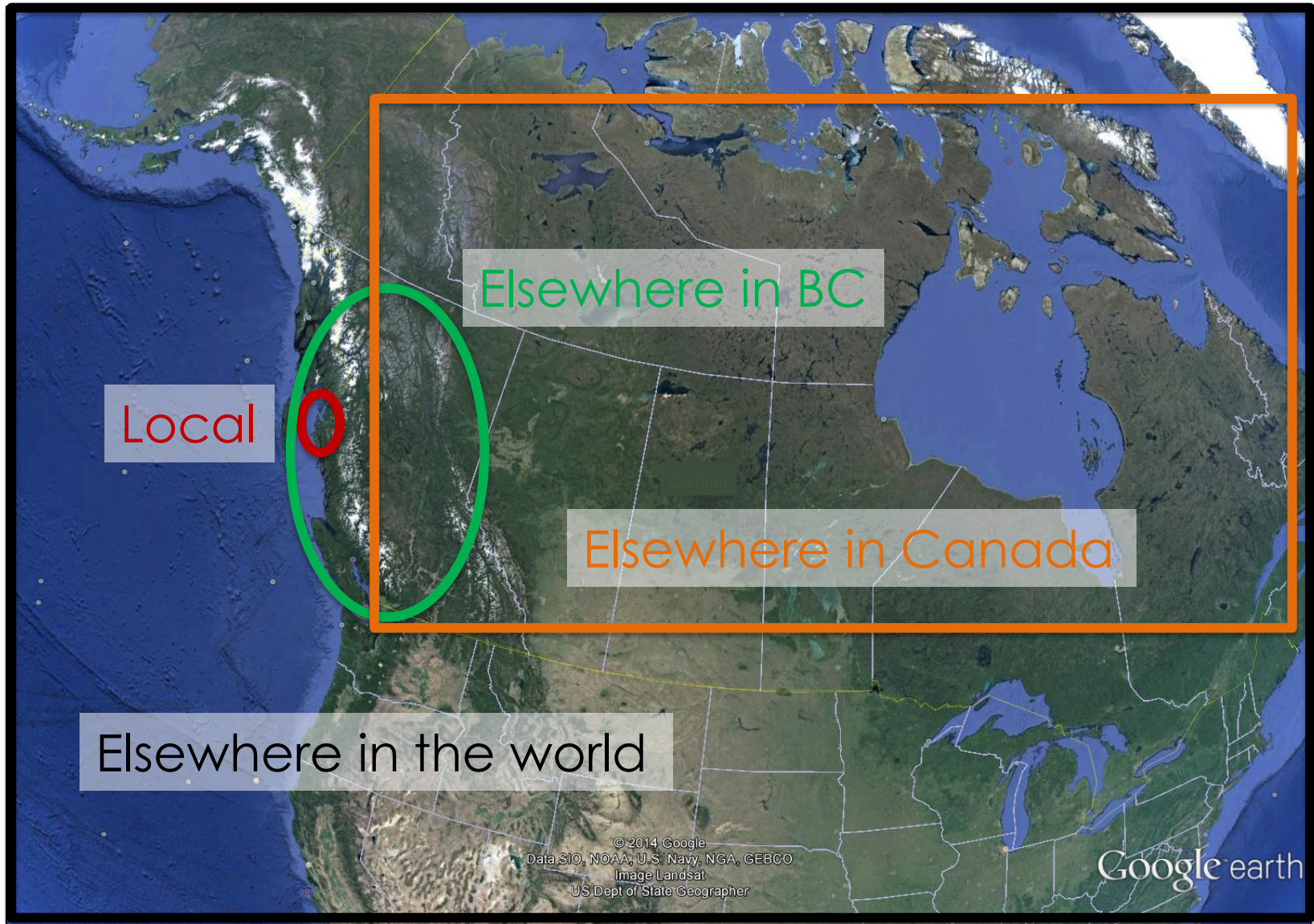
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2. Consultation and open discussion with local community and groups
 - Early in development process
3. Providing communication channels for individuals and groups
 - Ask questions and share their views and concerns
4. Being familiar with and respecting local community
 - Its people, history and concerns

5. Impact of consultants on the public's confidence in large-scale energy projects

- Survey measured degree to which public views where consultants originate from as being important to various aspects of project delivery

Which type of consultant gives the most confidence?



Local consultants give the most confidence

- Highest confidence in local consultants that the following things will be achieved
 - Their likelihood to be **familiar** with and **respect** the **local community, its people, history and concerns**
 - Their likelihood to **consult** with and **listen** to **local groups and people** who may be impacted by the project
 - Their likelihood to be **accessible for questions or concerns** put forward by any groups or people who may be impacted by the project

Local consultants give the most confidence



Project communities view local consultants even more favourably than Lower Mainland and rest of BC



Research Highlights

1. Public Awareness

- Very few people in BC consider themselves “**very well informed**” about any of these major projects
- Informed-ness level:

Project Communities > Rest of BC > Lower Mainland

2. Support & opposition

- Support for large development projects:

Project Communities > Lower Mainland > Rest of BC

*Enbridge Northern Gateway was exception

Research Highlights

3. Drivers of public opinion
 - **“Environmental impact”** - main opposition
 - **“Economic benefits”** – main support
4. Planning and approval
 - **Strong leadership and oversight**
 - **Transparency**
 - **Respect for regulations**
 - **Ethics**

Research Highlights

5. Impact of consultants' location

- Public most confident that **locally-based consultants** will be familiar with and respect local communities
- Confidence in locally-based consultants is high amongst Project Communities and those who tend to oppose projects generally

Achieving Social License – Key Points

- Factors affecting support or opposition
 - **“Environmental impact”** - main opposition
 - **“Economic benefits”** – main support
 - **“safety and well-being of local community”**
- Planning and approval: important aspects
 - Strong **leadership** and **oversight**
 - **Consultation** with local community
 - **Communication channels** with public
 - **Familiarity** with local community
- Highest confidence in **local consultants**