

BC Hydro – Site C Public Opinion Findings
Province-Wide and Regional Telephone Survey

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MARKET & OPINION RESEARCH
REPUTATION, MARKETING AND ISSUE MANAGEMENT

Introduction

BC Hydro commissioned research consultancy Anderson Insight to develop and complete a telephone survey of 804 people across the province of British Columbia, between September 3-8th, 2013. The margin of error for a sample of this size is +/- 3.5%, 19 times out of 20.

Between September 26th and 29th, an additional 250 interviews were conducted in the North and Northeast region of the province (excluding Northwest BC). The margin of error for this sample is +/-6.3%.

Summary

When asked specifically if they support the Site C proposal, 42% say they support the project, 13% oppose it, and another 42% indicate that they can support it “under certain circumstances”. This reveals that the potential level of support for the project is as high as 84% and the core opposition is less than 20%. The level of support and opposition in the region is remarkably similar to that found across the province as a whole.

The tendency to support the project is tied to satisfying a few key conditions. These include an independent evaluation of environmental impacts, care to listen to and mitigate the impacts on people and communities, and the belief that the project will yield abundant, affordable and renewable energy for years to come.

Almost 9 in 10 people say they would be comfortable with the Site C project provided that:

- Those in affected communities would be consulted and their views taken into account as much as possible (89%).
- There is an extensive, independent environmental review resulting in approval (86%).
- There is plenty of parallel effort put into conservation and other clean sources of energy for the province (86%).

Most people believe that all of these conditions can and likely will be met. In significant measure, this seems to be because they have confidence that the province has been able to manage these challenges successfully in the past, building a modern economy and maintaining a beautiful, natural environment.

Findings

When asked for their views on a number of different ways to meet the power needs of the future in BC, a large majority (69%) across the province indicated that they support “adding a new hydroelectric dam and generating facility”. Similar questions were posed in 2008 and 2012, which found 65% and 64% support respectively.

A similar proportion (70%) supports buying more power from independent power producers, such as wind and small run of the river projects.

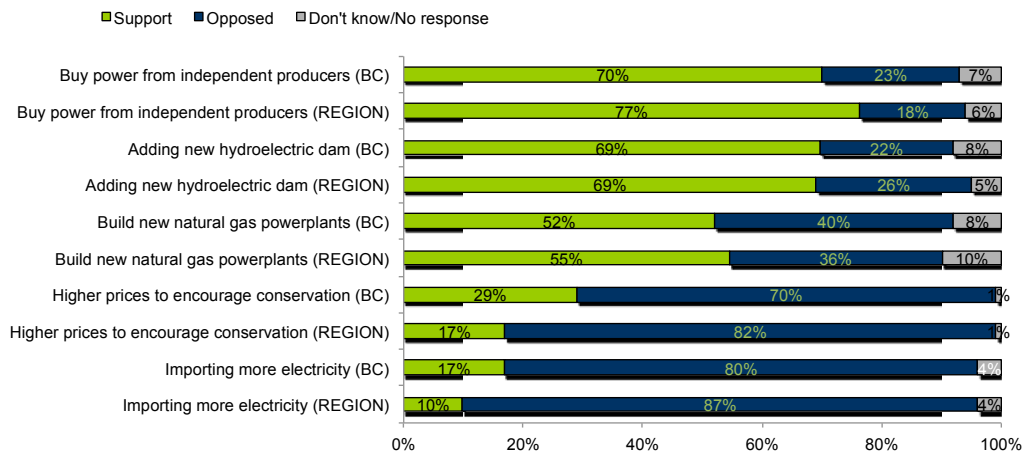
Fewer (52%) support building more natural gas fired power plants, using higher prices to promote conservation (29%) and only 17% support the idea of greater electricity imports.

Comparing the views of the sample in the region to the province-wide results reveals a high degree of consistency. Residents of the region are as likely as others to support a new hydro dam and less likely to support using price increases to reduce demand.

Views of Options to Meet BC Energy Needs

Over the next 20 years, the population of BC is expected to grow by more than 1 million people. More people, along with growth in the economy, is expected to mean a 40% increase in the demand for electricity used by British Columbians.

To meet this increase in electricity demand, a number of different approaches may be required. Do you support or oppose the following?

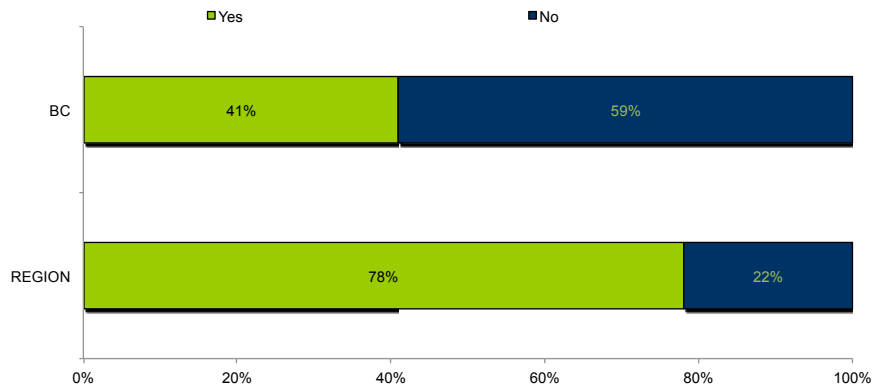


About four in ten (41%) residents of the province have heard about the proposed new dam, known as Site C, while 59% are unaware. As would be expected, awareness is much higher in the Region, with 78% reporting that they have heard, read or seen material about

Site C. There is no statistical difference in support for the proposed project based on awareness levels.

Awareness of Site C Project

Have you seen, read or heard anything about BC Hydro's proposed new dam, know as Site C, near Fort St. John?



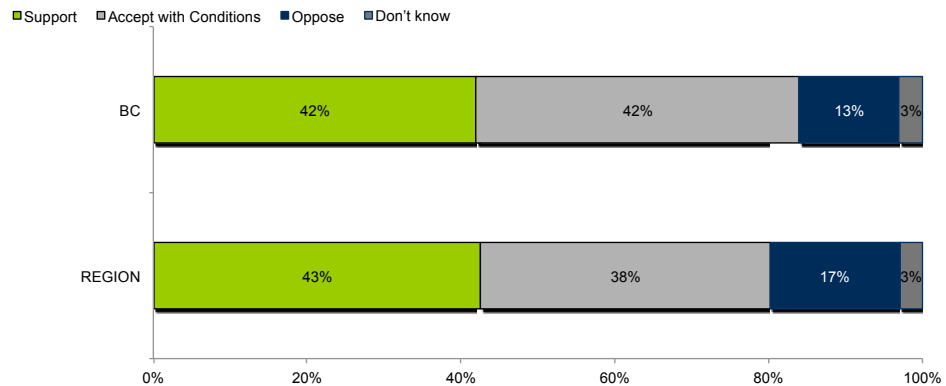
Support for Site C

When asked specifically if they support the Site C proposal, 42% say they support the project, 13% oppose it, and another 42% indicate that they can support it “under certain circumstances”. **This reveals that the potential level of support for the project is as high as 84%. In contrast, absolute levels of opposition are 20% or lower.**

Results among the regional sample are almost identical, differences are within the margin of error of the poll.

Support for Site C Project

Is the idea of building Site C, a new hydroelectric dam, to help meet the rising demand for electricity in BC, an idea you strongly support, support, can accept under certain circumstances, oppose, or strongly oppose?



Site C Project Impacts/Conditions

Feelings about the Site C project are tied to a number of values and perceptions. Among the interesting findings in this regard are the following:

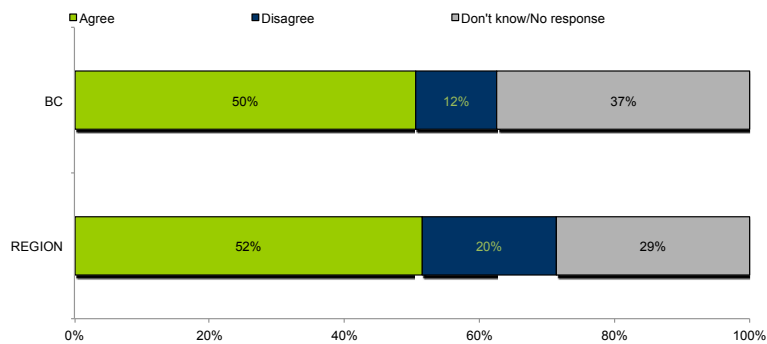
- By a margin of 54% to 11%, people agree, “The project will do a lot to help BC be a leader in the use of renewable, clean energy”. In the region, agreement is even higher at 63%; disagreement 13%.
- 71% agree and 7% disagree that “the project will help create jobs and economic spin-offs for British Columbians”. This view is even more common (79%) in the region.
- By a margin of 56% to 10%, people believe the project will “help ensure long term affordability of electricity for BC”. In the Region, 59% agree, 12% disagree.
- By a margin of 50% to 12%, people believe “There will be extensive effort to study and limit the impact on the environment in the area where the project will be built”. In the Region, 52% agree and 20% disagree.
- Similar proportions (48% to 12%) feel assured that “the views and needs of people and communities where the project will be built are going to be taken into account”. While

the margin is smaller in the Region, two people agree with this statement for every one that disagrees. (43% agree/21% disagree)

Site C Project – Environmental Diligence

Based on what you have seen about the Site C project, do you agree or disagree with each of the following, or do you feel you do not know enough to say?

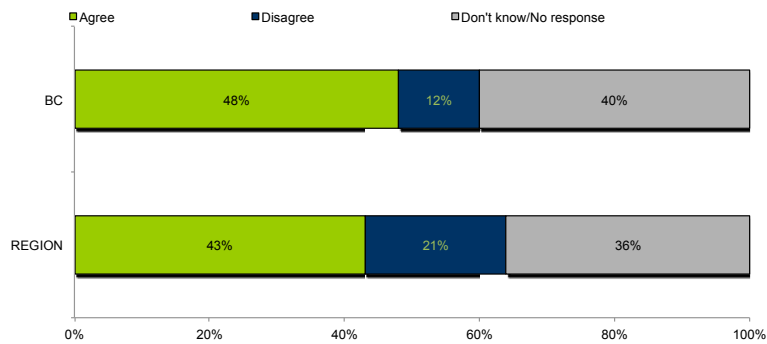
There will be extensive effort to study and limit the impact on the environment in the area where the project will be built



Site C Project – Community Engagement

Based on what you have seen about the Site C project, do you agree or disagree with each of the following, or do you feel you do not know enough to say?

The views and needs of people and communities where the project will be built are going to be taken into account



Taken together these results reveal that while many high profile development projects can shed support and see public anxiety grow, this has not happened in the case of the Site C project. BC residents are largely satisfied with and reassured by the process to date.

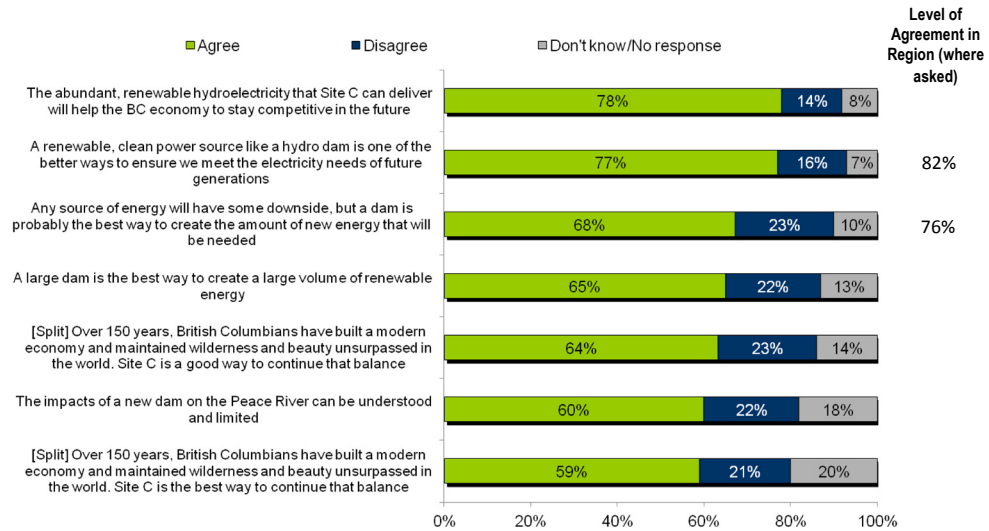
Support for the project appears to rest on a broad confidence that the Site C concept is an environmentally and socially responsible (study and effort to limit environmental and human impacts, renewable energy) approach that will also yield economic benefits (jobs, affordable power) for the province.

Views Surrounding Site C

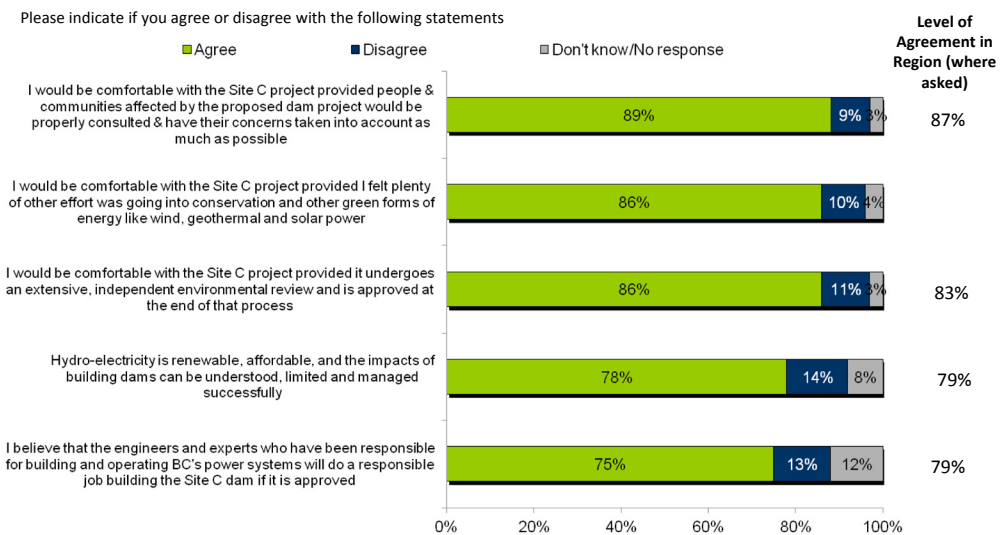
Respondents in the province-wide survey were presented with a number of statements about Site C and asked for their reactions. Some of these questions were also included in the regional sample. Across the province results show:

- Large majorities believe renewable electricity is good for competitiveness of the BC economy (78%) and a good way to meet the needs of future generations (77%).
- Two thirds believe that any source of energy will have some downside, but that a dam is probably the best way to create the amount of new energy that will be needed, and also the best way to create a large volume of renewable energy.
- Most British Columbians believe that the province has built a modern economy and maintained a “wilderness and beauty unsurpassed in the world” and that Site C is a way to continue to build on that tradition.
- Hydro electricity is viewed in a quite positive light, in part because it has known environmental impacts: 78% agree “hydro-electricity is renewable, affordable and the impacts of building dams can be understood, limited and managed successfully”.
- There is a high degree of confidence in the professionalism that has built BC’s power system to date, which adds confidence about Site C. Three out of four agree and only 13% disagree that “the engineers and experts who have been responsible for building and operating BC’s power systems will do a responsible job building the Site C dam if it is approved. Even among those who oppose the Site C project, 45% agree with this sentiment. Confidence is 79% in the region.

Views Surrounding Site C



Views Surrounding Site C



In total, roughly 9 in 10 people would be comfortable with the Site C project provided that:

- Those in affected communities are consulted and their views taken into account as much as possible (89% this year, 80% in 2012).
- There is parallel effort put into conservation and other clean sources of energy (86%).

There is an extensive, independent environmental review that results in approval (86% this year, 77% in 2012).

Conclusions

The results of this survey stand in somewhat remarkable contrast with the prevailing tendency in recent years, for large-scale development projects to become more controversial with the passage of time.

Instead, with respect to Site C, the data in this study suggest that this project has actually been building support over time, and that most people in the province believe that the project is in the province's interests and in their interests as well.

The tendency to support the project is tied to satisfying a few key conditions. These include an independent evaluation of environmental impacts, care to listen to and mitigate the impacts on people and communities, and the belief that the project will yield abundant, affordable and renewable energy for years to come. Most people believe Site C is a sound environmental and economic proposition.

Most people believe that all of these conditions can and likely will be met. In significant measure, this seems to be because they have confidence that the province has been able to manage these challenges successfully in the past, building a modern economy and maintaining a beautiful, natural environment.