

A majority of Canadians support or somewhat support public-private partnership for infrastructure projects

CCPPP September Survey Summary

submitted by Nanos to The Canadian Council for Public-Private Partnerships, October 2018
(Submission 2018-1228)



The Canadian Council for
Public-Private Partnerships



Le Conseil Canadien pour
les Partenariats Public-Privé

Summary

More than six in ten Canadians support or somewhat support public-private partnerships for new infrastructure in Canada

A majority of Canadians support or somewhat support public-private partnership for new infrastructure in Canada which is consistent with the last waves of research. Canadians are split on supporting international companies bidding on Canadian infrastructure projects, and are also divided about community benefit agreements.

- **A majority of Canadians support or somewhat support public-private partnerships** – When asked their support for possible public-private partnerships for new infrastructure in Canada just over six in ten say they would support (25%) or somewhat support (39%) the idea, while close to three in ten say they would oppose (14%) or somewhat oppose (15%) the idea. Eight percent are unsure. This is consistent with previous waves of research.
- **Just under four in ten Canadians say private sector companies charging too much most commonly drives budget overruns** – When asked which most commonly drives budget overruns on major public sector infrastructure construction projects, Canadians most frequently mention private sector companies charging too much (38%), followed by the government changing things in the project (29%) and too much unionized labor (14%). Eight-teen percent were unsure.
- **Nearly half of Canadians say they oppose international companies bidding on Canadian infrastructure projects** – When asked which statement comes closer to reflecting their view, just under half of Canadians (49%) say the statement “I oppose international companies bidding on Canadian infrastructure projects so that Canadian companies and workers get all of the benefits of investments in infrastructure” comes closest to their view, while 41% say the statement “I support open, competitive procurement that allows international companies to bid on Canadian infrastructure projects that may lead to lower prices and better expertise” comes closest to their view. Ten percent are unsure.

Summary

Individuals from the Prairies are more than twice as likely to say that approval processes favors environmentalists and indigenous communities than individuals from Quebec.

- **Canadians are split when it comes to community benefit agreements** – When asked which statement comes closer to reflecting their view, 46 per cent of Canadians say the statement “It is important that the local community benefits and participates in the development of public infrastructure, even if a project costs more to taxpayers” comes closest to reflecting their view, while 43 percent say the statement “The public infrastructure being built is already a benefit to the local community and taxpayers should not pay a higher price for a project for extra community benefits” comes closest to their view. Eleven percent are unsure.
- **Canadians most frequently say major infrastructure project approval processes favour environmentalists and indigenous communities** – When asked which statement best reflected their view on how the approval process for major infrastructure projects is working, just under four in ten (37%) say that the statement “The approval process favours environmentalists and indigenous communities” comes closest to their view, while 27 per cent say the statements “There is a good balance between economic interests, the environment and indigenous communities” and “It is too easy to build big infrastructure in this country without considering impacts on the environment and indigenous communities” comes closest to their view, respectively. Eight percent are unsure.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between September 29th and October 4th, 2018 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online.

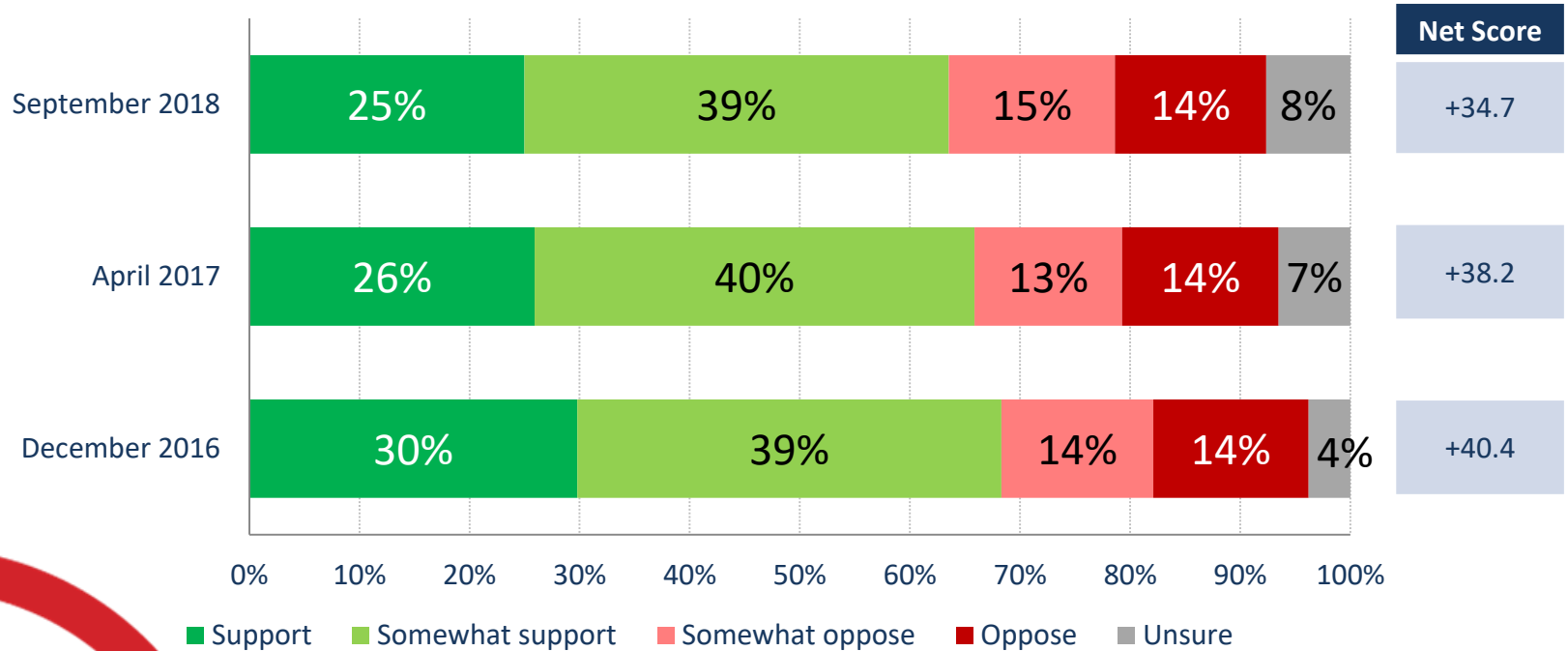
This study was commissioned by The Canadian Council for Public-Private Partnerships and the research was conducted by Nanos Research.

Support of public-private partnerships

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th to October 4th, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, April 29th to May 5th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, December 16th to 19th, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

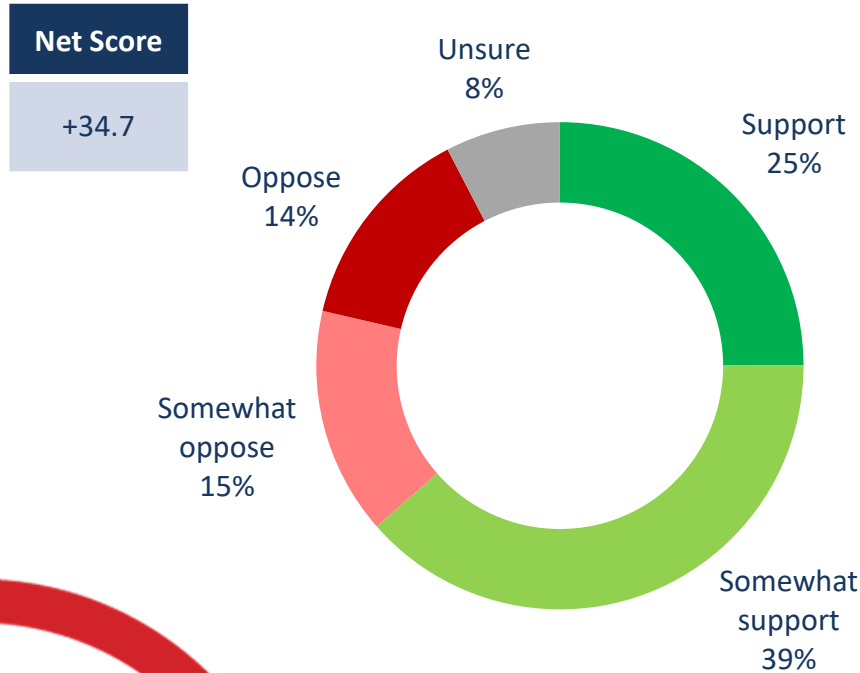


***Note: Charts may not add up to 100 due to rounding**

QUESTION – In Canada, some governments have created public-private partnerships to construct new public buildings and infrastructure. They remain government-owned assets, but there is an arrangement for the private sector to design, build, finance, maintain, and in some cases, operate these new public facilities. Would you support, somewhat support, somewhat oppose, or oppose possible public-private partnerships for new infrastructure in Canada?

Support of public-private partnerships

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th to October 4th, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Support/ Somewhat support
Atlantic (n=100)	61.2%
Quebec (n=250)	52.3%
Ontario (n=300)	65.9%
Prairies (n=200)	71.0%
British Columbia (n=150)	69.1%
Male (n=511)	67.4%
Female (n=489)	59.8%
18 to 34 (n=196)	61.7%
35 to 54 (n=455)	65.3%
55 plus (n=349)	63.2%

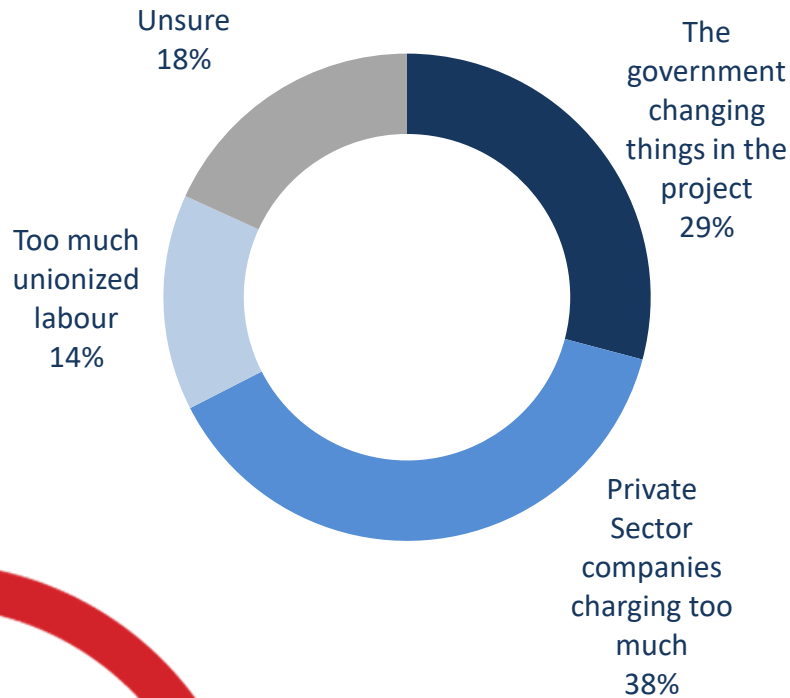
*Weighted to the true population proportion.

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QUESTION – In Canada, some governments have created public-private partnerships to construct new public buildings and infrastructure. They remain government-owned assets, but there is an arrangement for the private sector to design, build, finance, maintain, and in some cases, operate these new public facilities. Would you support, somewhat support, somewhat oppose, or oppose possible public-private partnerships for new infrastructure in Canada?

Most common source of budget overruns

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th to October 4th, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Private Sector charging too much
Atlantic (n=100)	37.2%
Quebec (n=250)	51.1%
Ontario (n=300)	36.7%
Prairies (n=200)	27.1%
British Columbia (n=150)	36.2%
Male (n=511)	37.0%
Female (n=489)	39.7%
18 to 34 (n=196)	36.0%
35 to 54 (n=455)	40.4%
55 plus (n=349)	38.2%

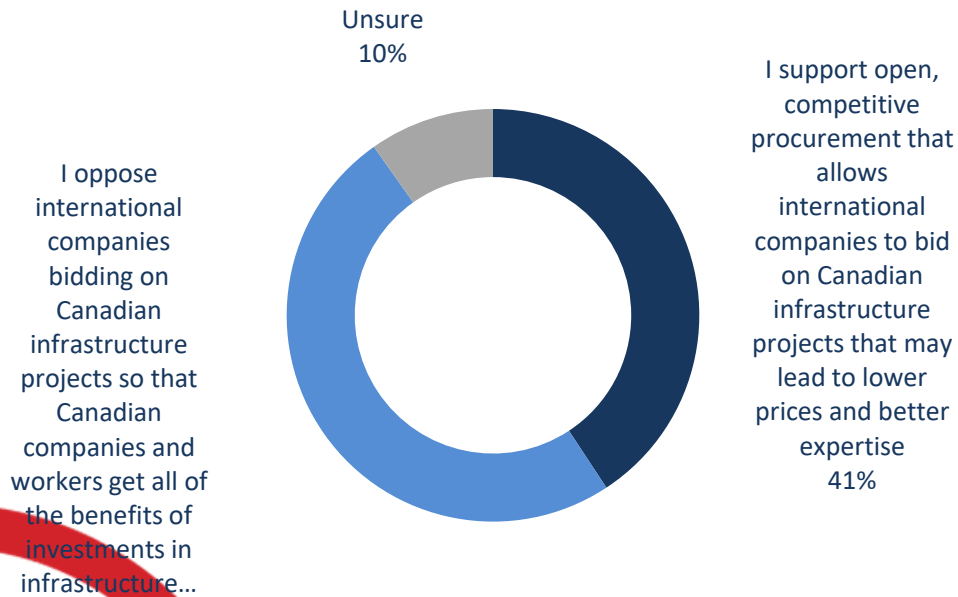
*Weighted to the true population proportion.

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QUESTION – Which ONE of the following most commonly drives budget overruns on major public sector infrastructure construction projects? [RANDOMIZE]

Views on infrastructure procurement rules

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th to October 4th, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Oppose international companies bidding
Atlantic (n=100)	55.3%
Quebec (n=250)	44.0%
Ontario (n=300)	49.4%
Prairies (n=200)	55.5%
British Columbia (n=150)	46.8%
Male (n=511)	44.2%
Female (n=489)	54.5%
18 to 34 (n=196)	47.6%
35 to 54 (n=455)	53.3%
55 plus (n=349)	47.5%

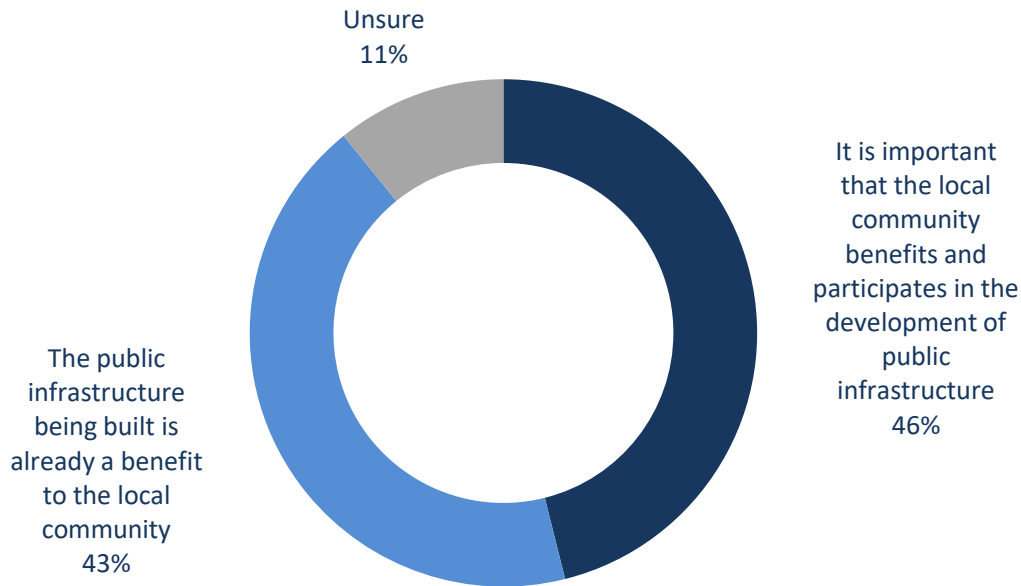
*Weighted to the true population proportion.

***Note: Charts may not add up to 100 due to rounding**

QUESTION – Canada’s infrastructure procurement rules allow foreign companies to openly compete with Canadian-based companies. Which statement comes closer to reflecting your view:

Views on community benefit agreements

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th to October 4th, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Local community benefits
Atlantic (n=100)	50.1%
Quebec (n=250)	45.0%
Ontario (n=300)	47.3%
Prairies (n=200)	39.5%
British Columbia (n=150)	51.6%
Male (n=511)	44.9%
Female (n=489)	47.2%
18 to 34 (n=196)	51.8%
35 to 54 (n=455)	45.7%
55 plus (n=349)	42.4%

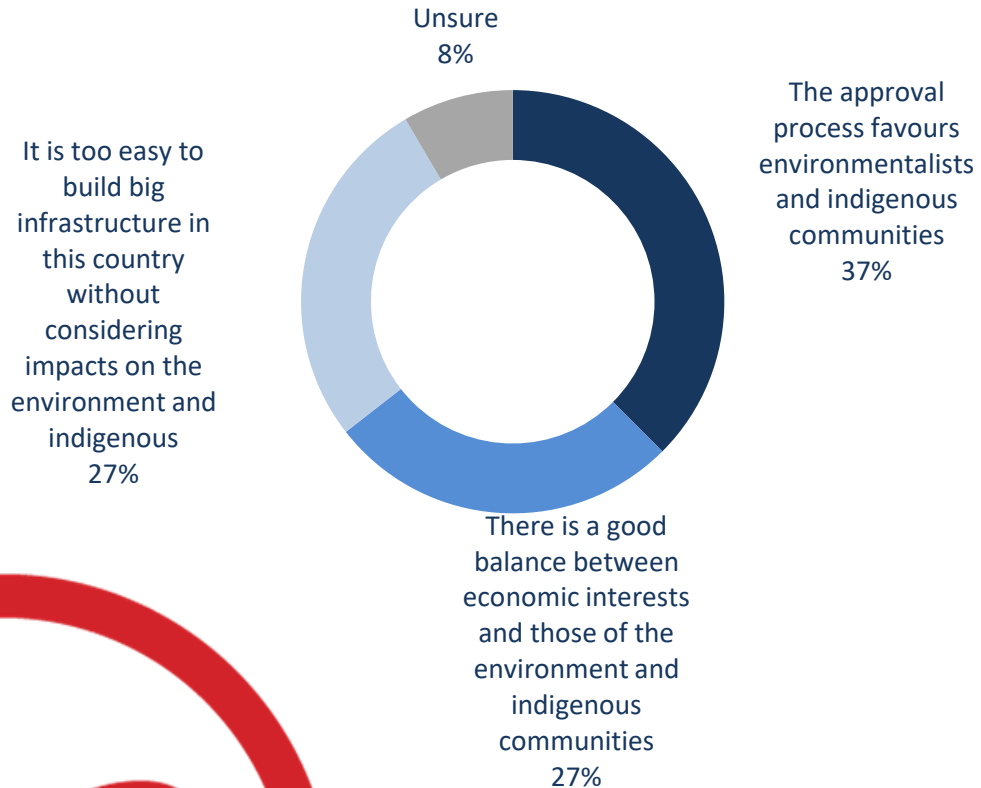
*Weighted to the true population proportion.

***Note: Charts may not add up to 100 due to rounding**

QUESTION – Some governments are requiring that community benefit agreements be mandatory for major infrastructure projects. This can include job and training opportunities for individuals and disadvantaged groups as well as benefits for small and local businesses impacted by the project. Which statement comes closer to reflecting your view:

Level of environmental and indigenous consultation in infrastructure projects

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th to October 4th, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

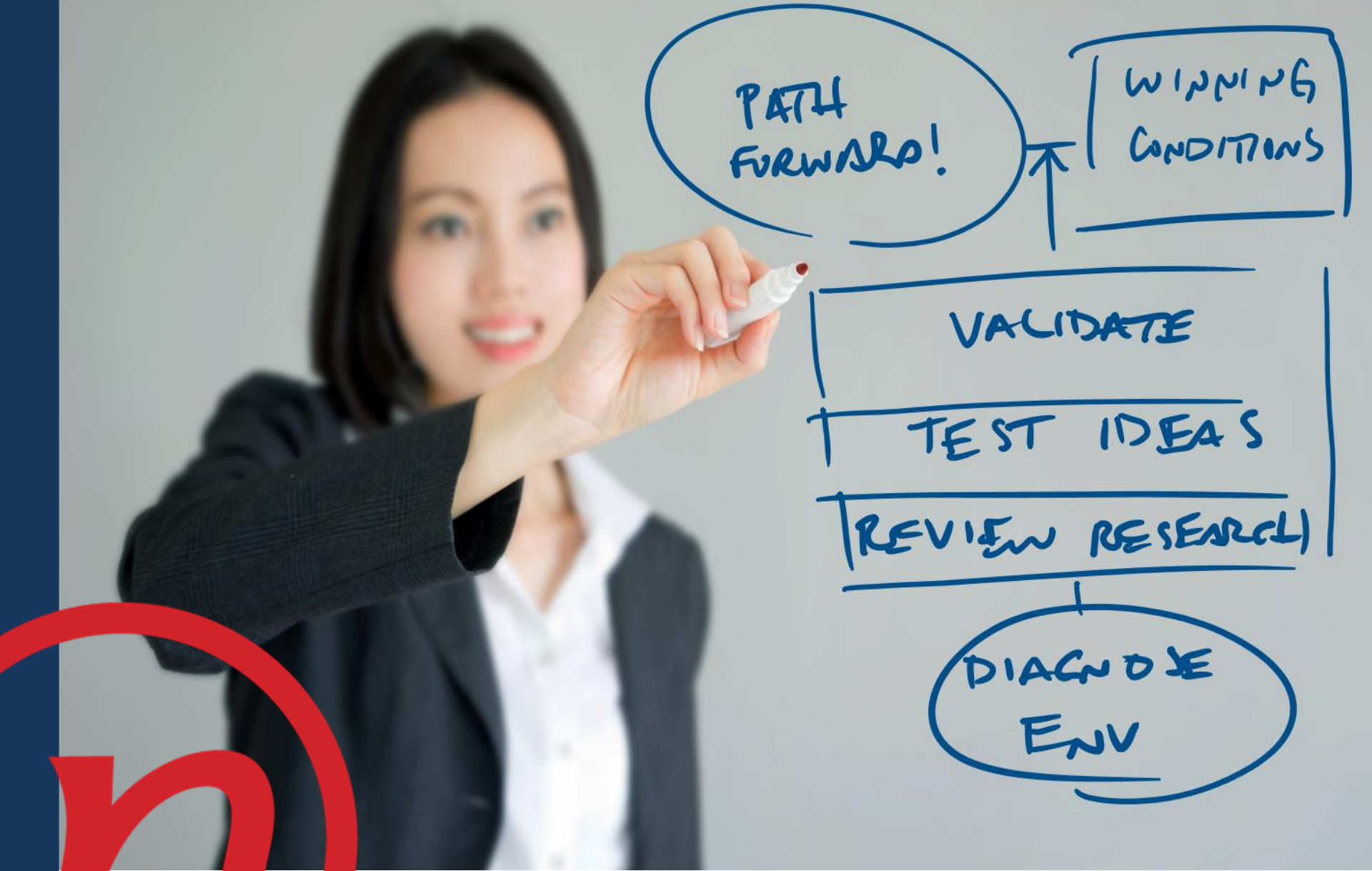


Subgroups	Favours environmentalists and indigenous communities
Atlantic (n=100)	33.0%
Quebec (n=250)	22.9%
Ontario (n=300)	33.9%
Prairies (n=200)	58.0%
British Columbia (n=150)	44.7%
Male (n=511)	45.8%
Female (n=489)	29.5%
18 to 34 (n=196)	30.5%
35 to 54 (n=455)	37.5%
55 plus (n=349)	42.4%

*Weighted to the true population proportion.

***Note: Charts may not add up to 100 due to rounding**

QUESTION – Major infrastructure projects in Canada often have to go through environmental assessments and in some cases indigenous consultation and accommodation requirements before receiving project approvals. Which statement comes closest to your view on how the approval process is working:



Methodology

Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between September 29th and October 4th, 2018 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals were randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

The research was commissioned by The Canadian Council for Public-Private Partnerships and was conducted by Nanos Research.

Note: Charts may not add up to 100 due to rounding.

Previous waves

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between April 29th and May 5th, 2017 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between December 16th and 19th, 2016 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

Technical Note

Element	Description	Element	Description
Organization who commissioned the research	The Canadian Council for Public-Private Partnerships	Weighting of Data	The results were weighted by age and gender using the latest Census information (2016) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Final Sample Size	1000 Randomly selected individuals.	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Margin of Error	±3.1 percentage points, 19 times out of 20.	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines could not participate.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Stratification	By age and gender using the latest Census information (2016) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Estimated Response Rate	Ten percent, consistent with industry norms.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Fieldwork/Validation	Live interviews with live supervision to validate work.	Question Content	This was module seven of an omnibus survey. Previous modules contained questions on unprompted issues of national concern, taxes, U.S. Canada relations, marijuana and pharmacare.
Number of Calls	Maximum of five call backs.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Survey Company	Nanos Research
Field Dates	September 29 th to October 4 th , 2018.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanos.co Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.
Language of Survey	The survey was conducted in both English and French.		
Standards	This report meets the standards set forth by ESOMAR.		

About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



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Tabulations



2018-1228 – The Canadian Council for Public-Private Partnerships – STAT SHEET

			Region						Gender		Age		
			Canada 2018-09	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - In Canada, some governments have created public-private partnerships to construct new public buildings and infrastructure. They remain government-owned assets, but there is an arrangement for the private sector to design, build, finance, maintain, and in some cases, operate these new public facilities. Would you support, somewhat support, somewhat oppose, or oppose possible public-private partnerships for new infrastructure in Canada?	Total	Unwgt N	1000	100	250	300	200	150	511	489	196	455	349
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Support	%	25.0	20.8	14.2	30.6	31.1	26.3	27.8	22.2	27.8	24.1	23.8
	Somewhat support	%	38.6	40.4	38.1	35.3	39.9	42.9	39.6	37.6	33.9	41.2	39.5
	Somewhat oppose	%	15.1	17.6	22.7	12.5	10.2	12.3	11.9	18.2	13.3	13.2	18.0
	Oppose	%	13.8	12.7	16.4	11.5	14.8	13.1	15.7	11.9	14.0	15.5	12.1
	Unsure	%	7.6	8.5	8.6	10.0	3.9	5.5	5.0	10.2	11.0	6.0	6.7

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			Region					Gender		Age			
			Canada 2018-09	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Which ONE of the following most commonly drives budget overruns on major public sector infrastructure construction projects? [RANDOMIZE]	Total	Unwgt N	1000	100	250	300	200	150	511	489	196	455	349
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	The government changing things in the project	%	29.1	29.0	22.4	31.2	32.9	31.3	34.2	24.3	23.9	28.1	33.7
	Private Sector companies charging too much	%	38.4	37.2	51.1	36.7	27.1	36.2	37.0	39.7	36.0	40.4	38.2
	Too much unionized labour	%	14.3	17.6	12.8	10.2	20.7	14.5	14.2	14.5	19.2	13.1	12.1
	Unsure	%	18.2	16.2	13.7	21.9	19.2	18.1	14.6	21.6	20.9	18.4	16.0

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			Canada 2018-09	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Canada's infrastructure procurement rules allow foreign companies to openly compete with Canadian-based companies. Which statement comes closer to reflecting your view: [ROTATE]	Total	Unwgt N	1000	100	250	300	200	150	511	489	196	455	349
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	I support open, competitive procurement that allows international companies to bid on Canadian infrastructure projects that may lead to lower prices and better expertise	%	40.7	37.5	44.7	40.3	34.7	45.3	48.0	33.8	42.6	36.5	43.2
	I oppose international companies bidding on Canadian infrastructure projects so that Canadian companies and workers get all of the benefits of investments in infrastructure	%	49.5	55.3	44.0	49.4	55.5	46.8	44.2	54.5	47.6	53.3	47.5
	Unsure	%	9.8	7.2	11.3	10.3	9.8	7.9	7.8	11.7	9.8	10.2	9.4

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			Region					Gender		Age			
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Question - Some governments are requiring that community benefit agreements be mandatory for major infrastructure projects. This can include job and training opportunities for individuals and disadvantaged groups as well as benefits for small and local businesses impacted by the project. Which statement comes closer to reflecting your view: [ROTATE]	Total	Unwgt N	1000	100	250	300	200	150	511	489	196	455	349
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
		%	46.1	50.1	45.0	47.3	39.5	51.6	44.9	47.2	51.8	45.7	42.4
		%	43.1	41.0	45.5	40.6	47.0	40.1	47.2	39.1	35.8	43.4	47.8
		%	10.8	8.9	9.6	12.1	13.5	8.3	7.8	13.7	12.4	10.9	9.7

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			Region						Gender		Age		
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Question - Major infrastructure projects in Canada often have to go through environmental assessments and in some cases indigenous consultation and accommodation requirements before receiving project approvals. Which statement comes closest to your view on how the approval process is working: [ROTATE]	Total	Unwgt N	1000	100	250	300	200	150	511	489	196	455	349
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	The approval process favours environmentalists and indigenous communities	%	37.5	33.0	22.9	33.9	58.0	44.7	45.8	29.5	30.5	37.5	42.4
	There is a good balance between economic interests and those of the environment and indigenous communities	%	27.0	33.9	28.8	28.3	23.0	21.8	27.6	26.3	26.3	27.4	27.0
	It is too easy to build big infrastructure in this country without considering impacts on the environment and indigenous communities	%	27.1	24.1	42.0	23.9	12.4	30.3	19.7	34.2	32.5	26.1	24.2
	Unsure	%	8.5	9.0	6.3	14.0	6.5	3.2	6.9	10.0	10.6	9.0	6.5

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