



POPULATION GROWTH AND THE NEED FOR PUBLIC-PRIVATE PARTNERSHIPS TO MEET INFRASTRUCTURE NEEDS

What do Canadians think?

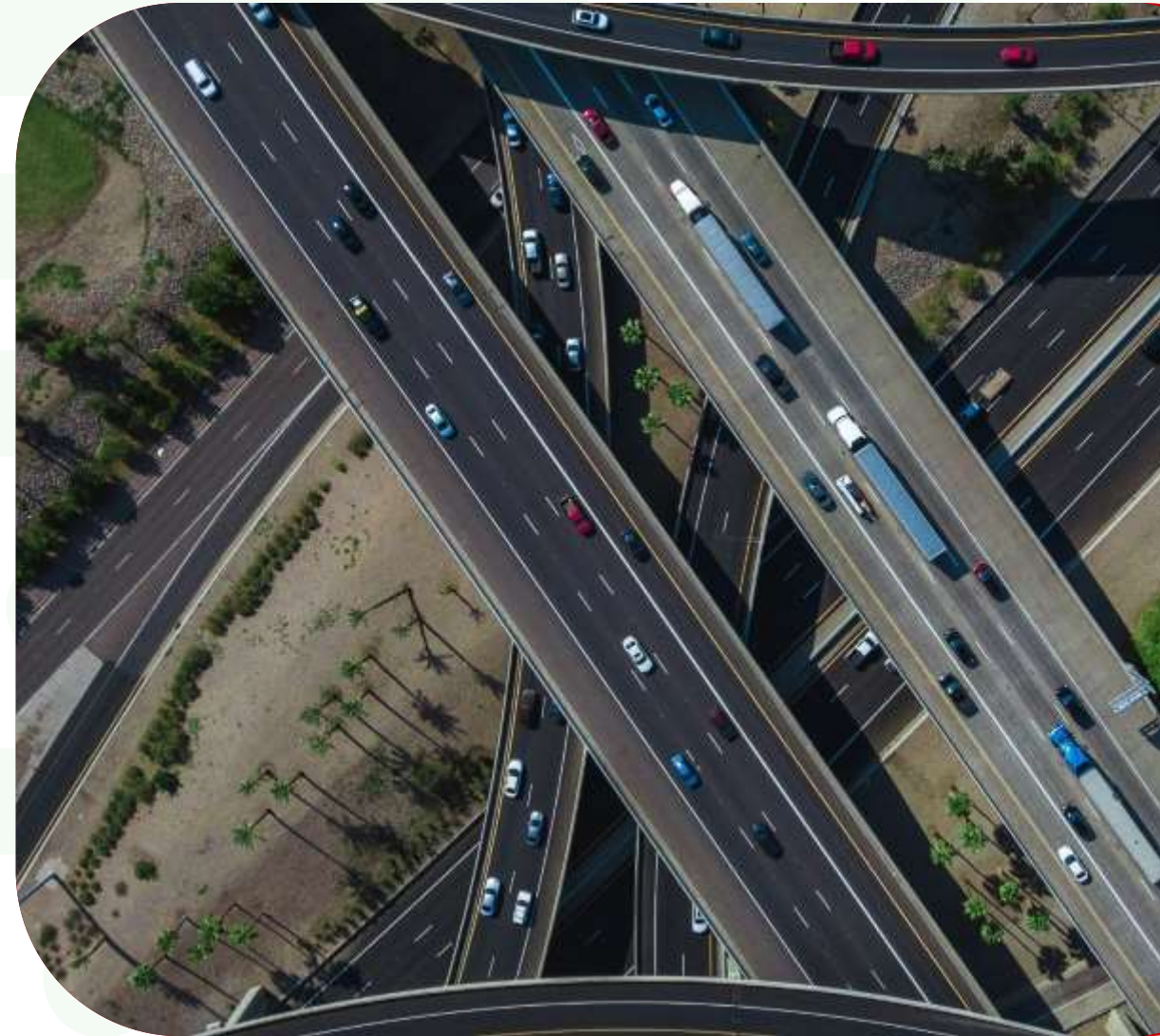
September 2024

Methodology

The survey was conducted with 1,700 adult Canadians from September 19 to 25, 2024. A random sample of panelists were invited to complete the survey from a set partner panel based on the Lucid exchange platform. These partners are typically double opt-in survey panels, blended to manage out potential skews in the data from a single source. Children were invited to complete the survey via their parents.

The margin of error for a comparable probability-based random sample of the same size is +/- 2.4%, 19 times out of 20.

The data were weighted according to census data to ensure that the sample matched Canada's population according to age, gender, and region. Totals may not add up to 100 due to rounding.



TOPLINE RESULTS



KEY FINDINGS

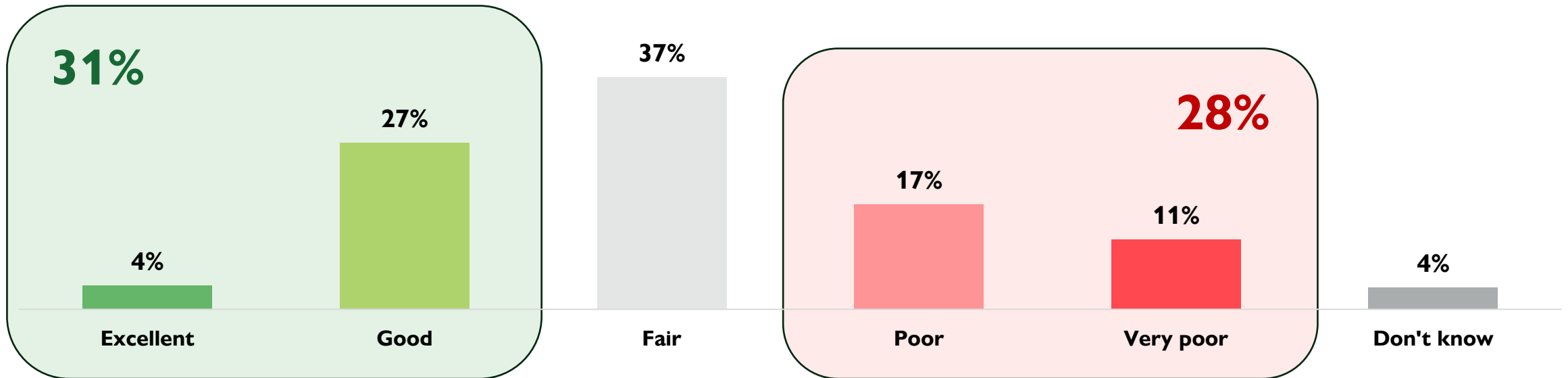
1. Only a third feel that infrastructure in their communities is currently in good shape.
 - 31% think infrastructure is excellent/good, 37% say fair and 28% say poor/very poor.
2. There is undoubtedly concern for the future of infrastructure. Nearly all believe there will be an infrastructure problem in our future, for a number of reasons.
 - 92% of Canadians agree Canada's rapidly growing population will increase the demand for new and improved public infrastructure in Canada (including 51% who strongly agree).
 - 88% believe public infrastructure in Canada is deteriorating and requires significant repairs and upgrades.
 - 63% are not confident governments can cover the costs of building and maintaining infrastructure without raising taxes.
3. Canadians across demographics prefer approaches where government-private sector share financial costs and risks.
 - 47% prefer an approach where the government shares the financial cost and the risk with private companies. 24% prefer an approach where the government alone takes on the financial cost and risk.
4. There is public support for the model's benefits, but hesitation around the term 'P3s' indicates a gap in understanding.
 - 60% say a combination of government and private investments, and other resources is a good idea (in other words, P3s). Only 49% say the same about "public private partnerships".



How would you rate the current condition of public infrastructure in your community?

Only a third feel that infrastructure in their communities is currently in good shape

There are several demographic differences. Concern about the current state of public infrastructure is higher among: younger Canadians, women, those in rural areas, and those in SK/MB, QC and Atlantic Canada.



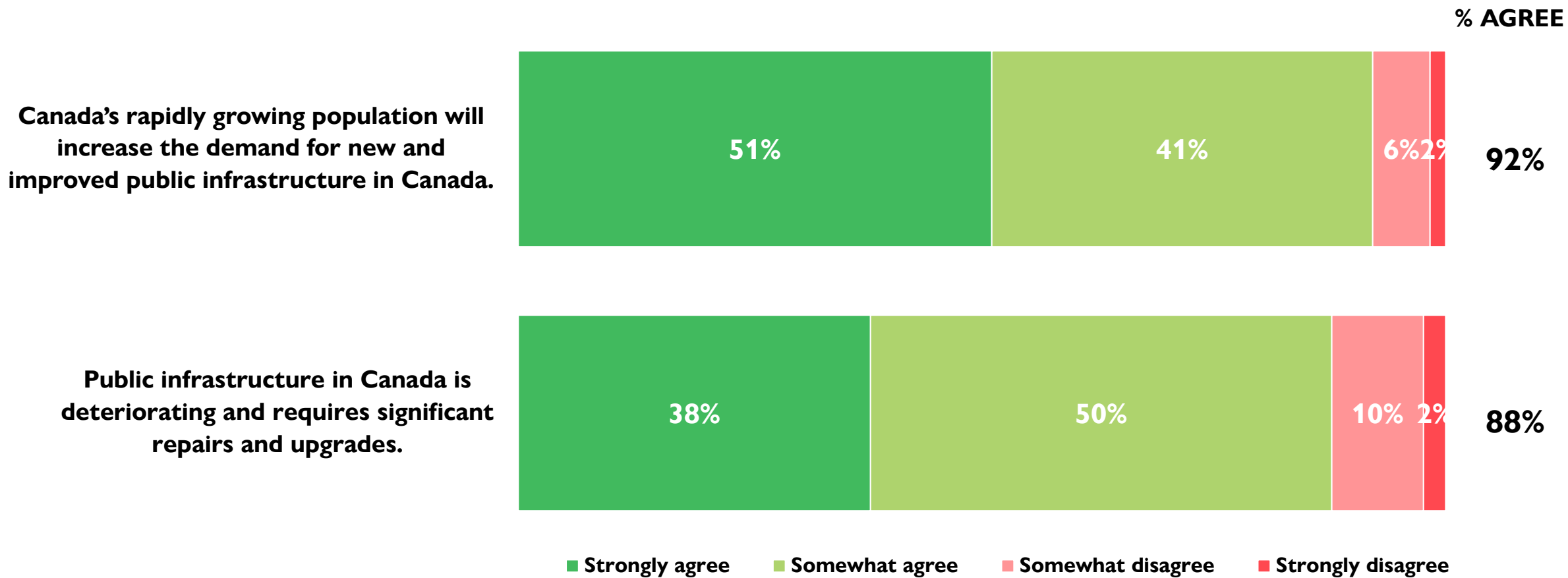
[Base] n=1,700

Totals may not add up to 100 due to rounding.
Numbers are rounded to the nearest decimal place.



Do you agree or disagree...

And Canadians certainly believe there will be infrastructure problems in the future



[Base] n=1,700

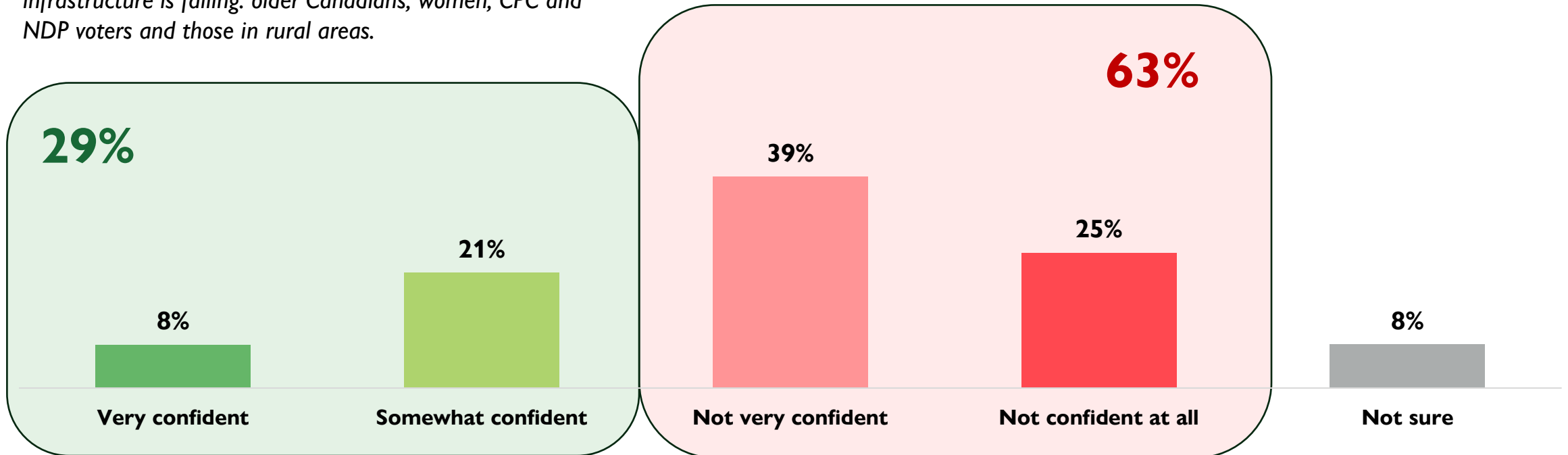
Totals may not add up to 100 due to rounding. Numbers are rounded to the nearest decimal place.



How confident, if at all, are you that governments can fully cover the costs of maintaining and building all the infrastructure Canada needs in the coming years without raising taxes?

Canadians are not confident governments can cover the costs of building and maintaining infrastructure without raising taxes

Confidence is particularly low for those who already believe infrastructure is failing: older Canadians, women, CPC and NDP voters and those in rural areas.



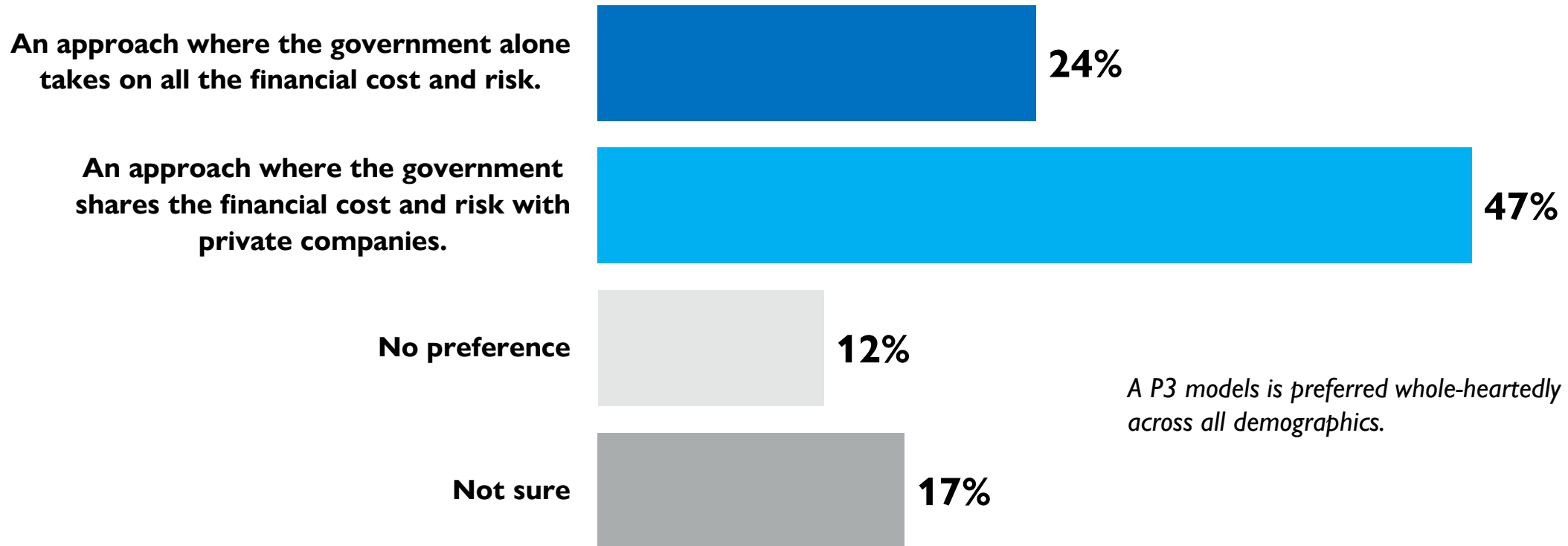
[Base] n=1,700

Totals may not add up to 100 due to rounding. Numbers are rounded to the nearest decimal place.



Understanding that all public infrastructure requires investment... Which approach do you prefer for handling the financial cost and risk of infrastructure repair, maintenance, and building things like roads, rec centres, water/wastewater systems, and hospitals in Canada?

Canadians across demographics prefer approaches where government-private sector share financial costs and risks



[Base] n=1,700

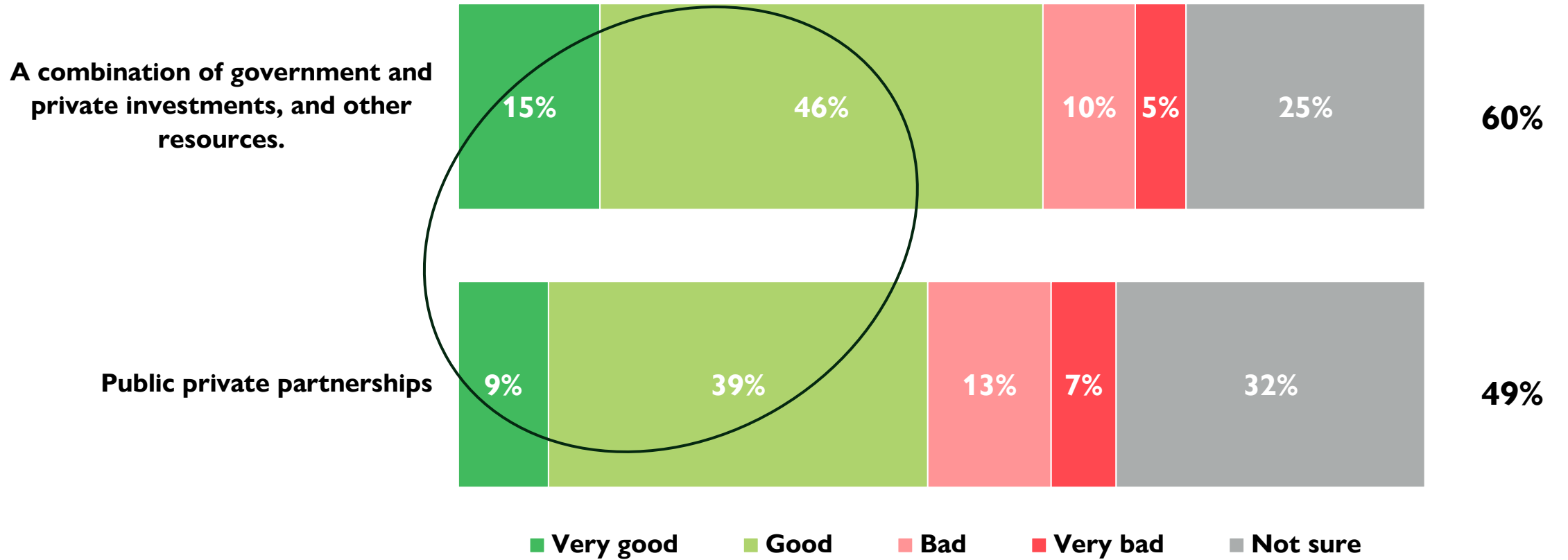
Totals may not add up to 100 due to rounding. Numbers are rounded to the nearest decimal place.



When it comes to building, funding, operating and maintaining public infrastructure in Canada (roads, rec centres, water/wastewater systems, hospitals etc.) there are a number of different models that can be used. Do you think is a very good idea, good idea, bad idea, or very bad idea, to use...

Support for the P3 model is present, but there are clear hesitations with the phrase

% GOOD



[Base] n=1,700

Totals may not add up to 100 due to rounding. Numbers are rounded to the nearest decimal place.