



Ontario Responsible Sourcing Study

August 22, 2011



Nobody's Unpredictable



Methodology

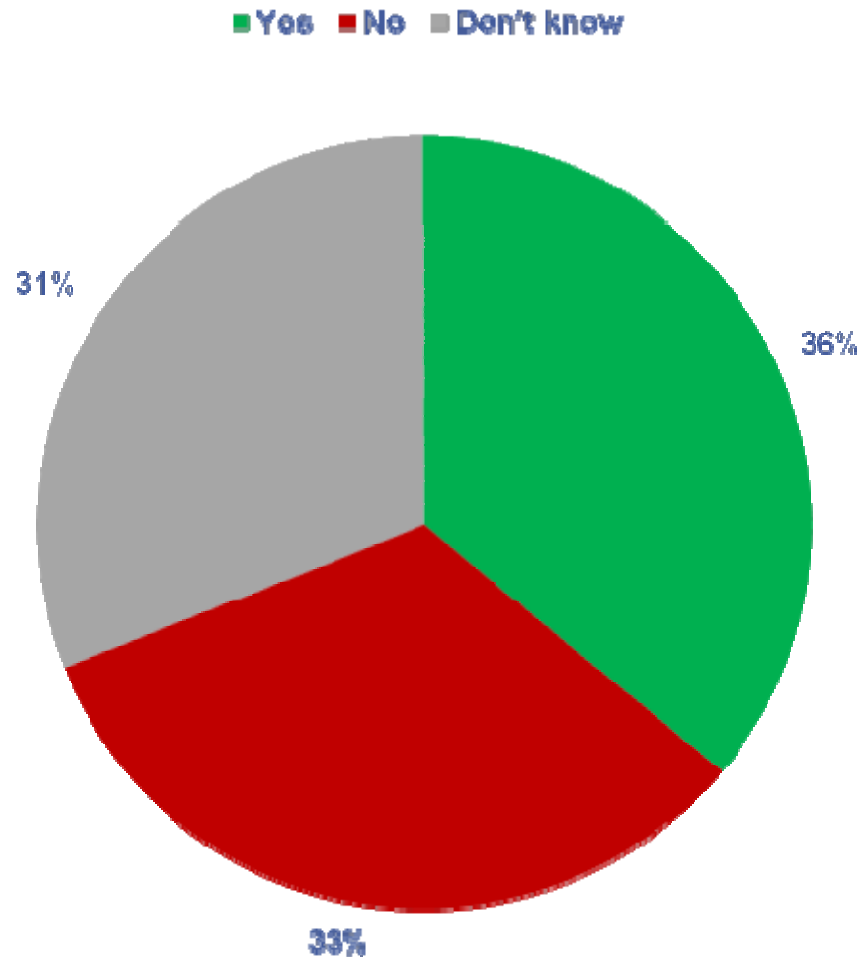
- These are some of the findings of an Ipsos Reid poll conducted between August 4 and 8, 2011. For this survey, a sample of 855 adults living in Ontario from Ipsos' Canadian online panel was interviewed online. ..
- Weighting was then employed to balance demographics and political composition to ensure that the sample's composition reflects that of the adult population according to Census data and to provide results intended to approximate the sample universe...
- A survey with an unweighted probability sample of this size and a 100% response rate would have an estimated margin of error of +/-3.4 percentage points, 19 times out of 20, of what the results would have been had the entire population of adults in Ontario been polled...
- This survey was not sponsored or paid for by any person or organization; it was constructed by Ipsos for the Association of Municipalities of Ontario (AMO) meeting of August 22, 2011 to provide insights to delegates during a presentation panel on responsible sourcing of aggregates.



Detailed Findings



36% of Ontarians Say they're Aware of a Quarry in their Municipality/Region Where They Live Or Have Property, Like a Cottage...



Q1. Sand, stone and gravel that are essential to build the infrastructure we need - like roads and public buildings - are mined from quarries and referred to as 'aggregates'. Is there a quarry in your municipality or region where you live or have property like a cottage?

Base: All Respondents (n=855)



Quarry Awareness: the 36%...

- **Northern Ontario 54%, Central Ontario 53%, Eastern Ontario 51%, Southwest Ontario 46% and GTA 19%**
- **Men 42%, Women 31%, 55+ 47%, 35 – 54 32%, 18 – 34 30%**
- **\$60k+ 40%, \$30-\$59K 37%, <\$30K 26%**
- **Without children 38%, With children 32%,**



Make Sure Impact on Landscape Environmentally Safe/Sound (69%), Careful About Impact on Surrounding Community (66%)...

■ Very much agree

■ Somewhat agree

■ Somewhat disagree

■ Very much disagree

% Agree

Are good job and revenue generators for the local communities that host them



85%

Are well managed by the companies that run them



72%

Are highly regulated and inspected regularly



70%

Make sure the impact on the landscape is environmentally safe and sound



69%

Are careful of their impact on the surrounding community where people live



66%

Create too much noise, truck traffic and damage to the community where they reside



65%

→ Is a business that I do not support because they are often reckless and irresponsible



37%

Q2. Based on what you know, please indicate whether you very much agree, somewhat agree, somewhat disagree or very much disagree with the following statements about quarries in Ontario:

Base: All Respondents (n=855)



Certification

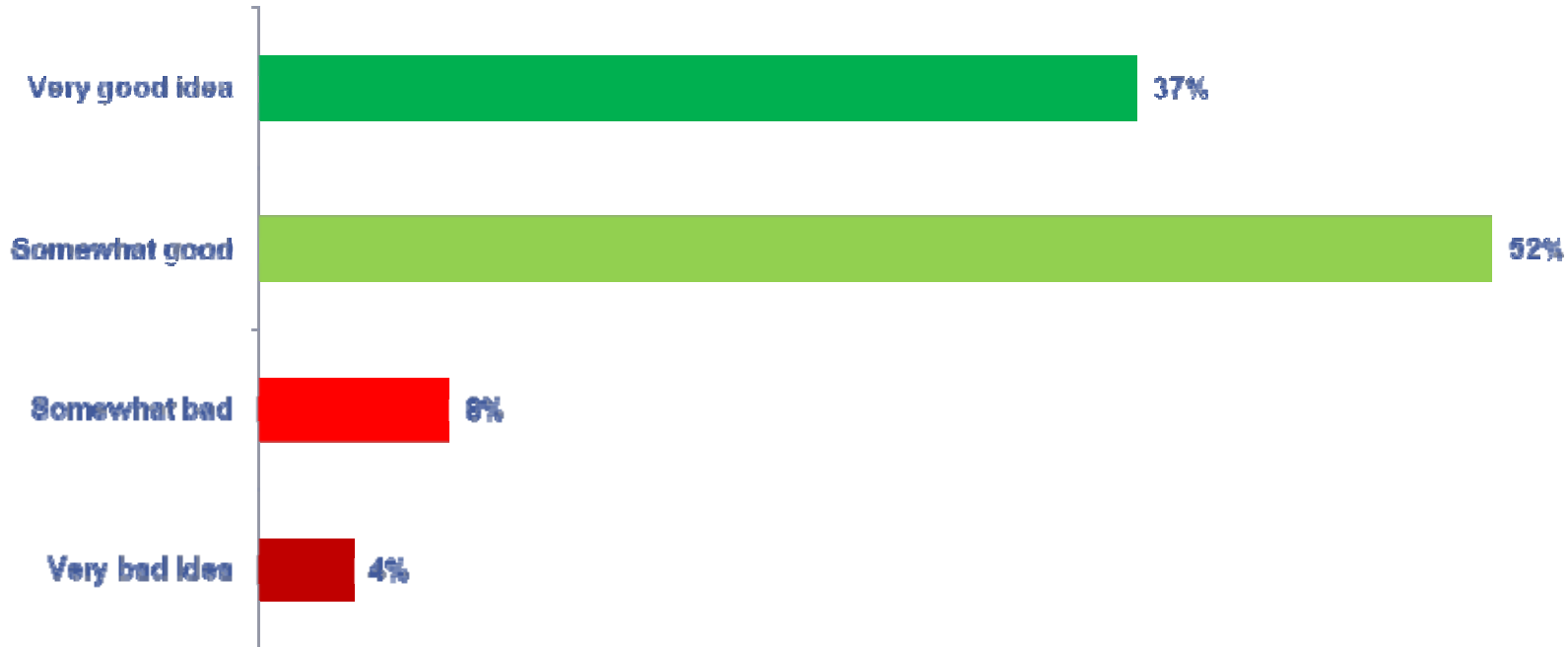


Certification: The Respondent Preamble...

- Quarries are regulated by government for safety, environmental impact, noise and truck routes. There currently is no certification process for companies operating quarries to be recognized for meeting/exceeding social and environmental best practices. It is being proposed that a not-for-profit entity be established to set voluntary “responsible” standards – higher than those currently required by the government—for companies.
- This independent, non-government monitoring agency would set new “world class” eco- friendly standards for quarry operators and where one could be located; set best practices in operating procedures; audit quarries against these requirements; and, verify that the output product meets these standards as “green” building materials. A company or operation would only obtain a certificate from this agency if they complied with and maintained all the required standards. Do you think a certifying program like this is a very good, somewhat good, somewhat bad or very bad idea?



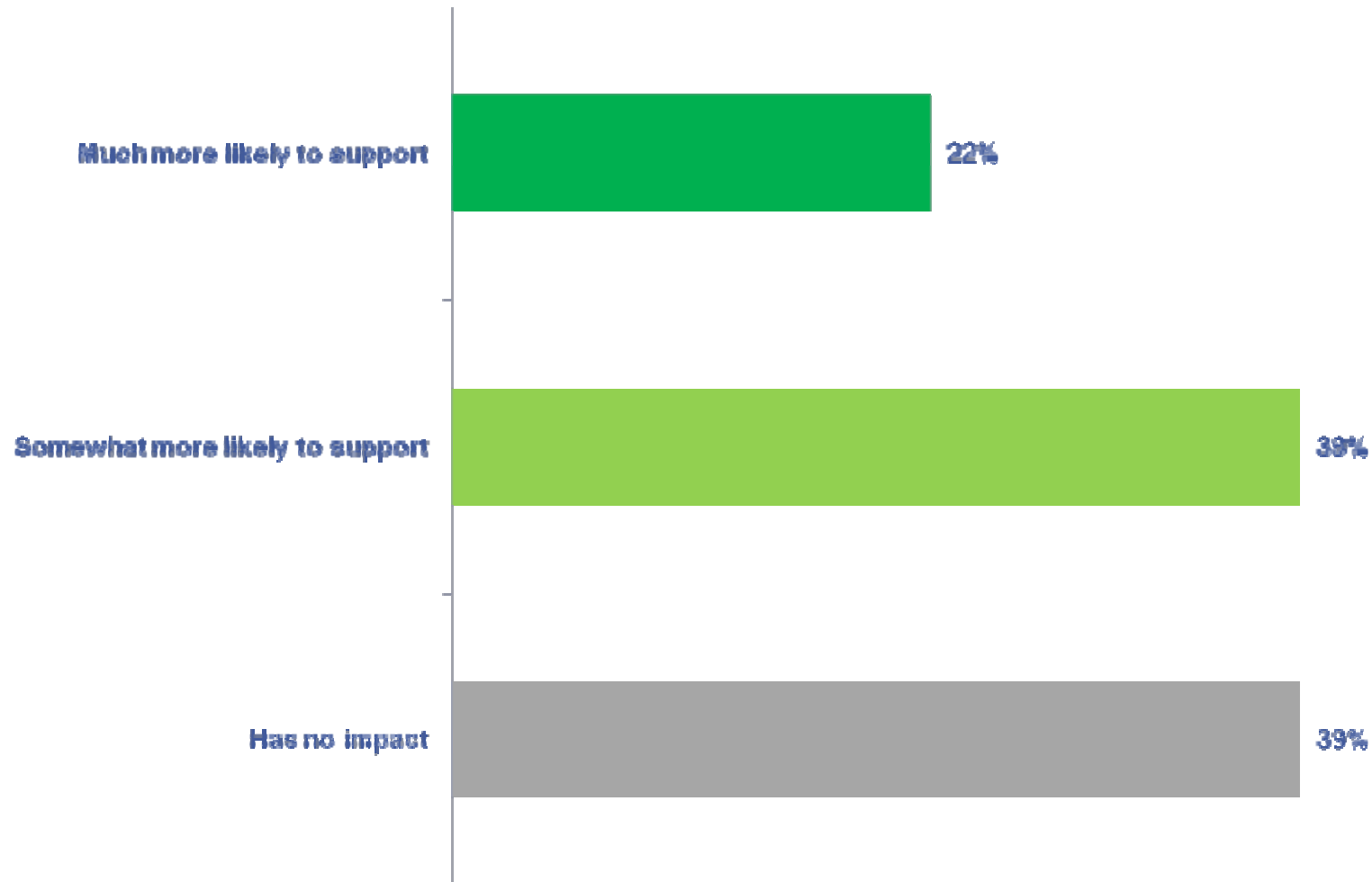
Possible Certification Program: Overall 89% Say it's a "Good Idea" ...including 93% of those Who Don't Support Quarries...



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Certification Program: Overall 64% say if a Quarry/Aggregate Site Was Certified They'd More Likely Support One in Their Municipality/Region...



Q4. If you knew a quarry/aggregate site was 'certified' would you be much more likely, somewhat more likely or have no impact on your position to support one in your municipality or region?

Base: All Respondents (n=855)



Impact of Certificate Program as a Market-Based Tool for Government Regulators



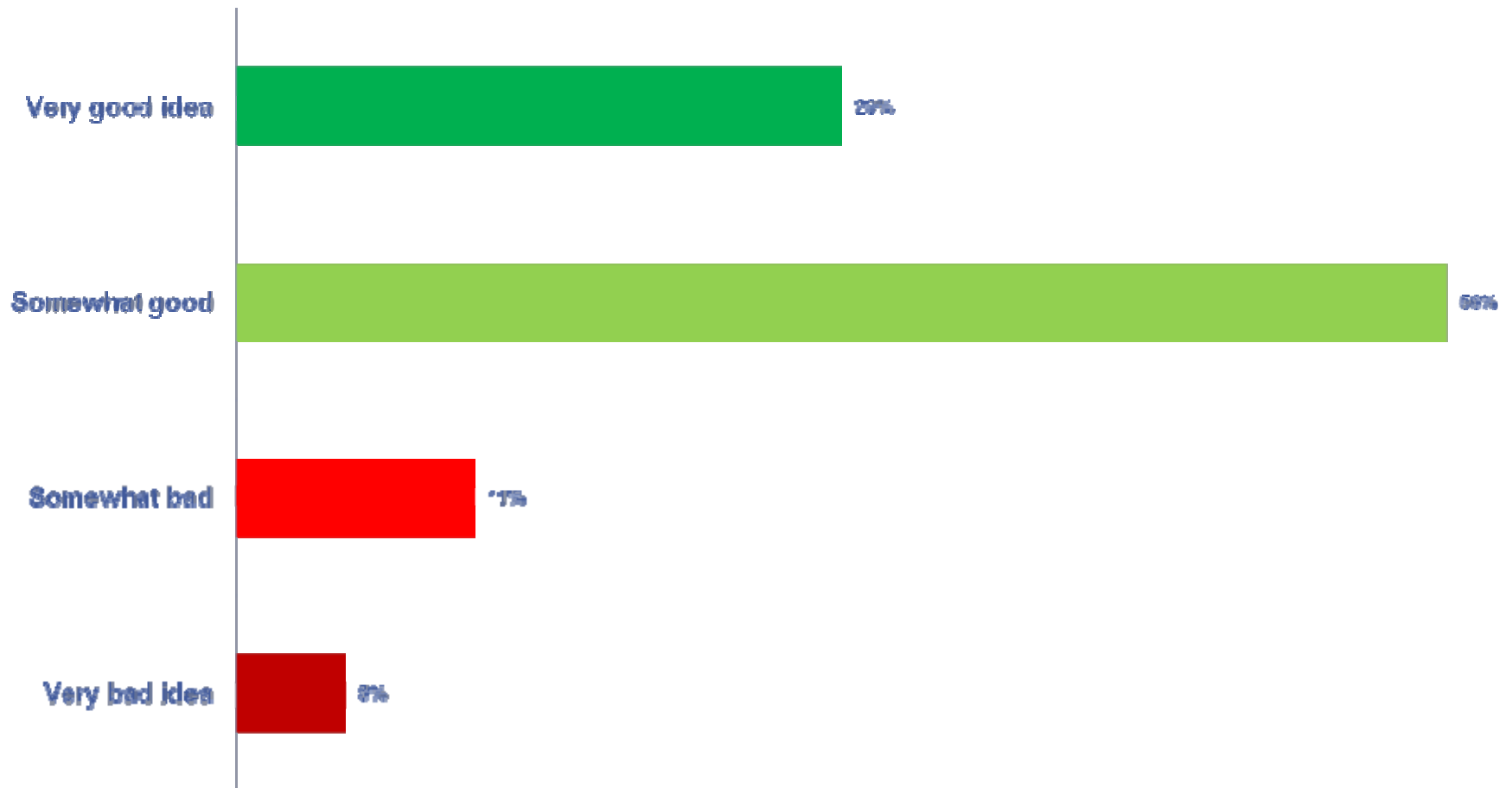


Certification as a Market-Based Tool: The Respondent Preamble...

- A certificate could also give government regulators a market-based tool to recognize sites that have gone above and beyond current regulatory requirements, and give government purchasers (the federal, provincial and municipal governments combined buy over half the building material in Ontario, using aggregates for their own projects) leverage by “rewarding companies” meeting these “eco-friendly” standards, choosing them more often, at no extra cost.
- Knowing this too, do you think a certificate program like this is a very good, somewhat good, somewhat bad or very bad idea?



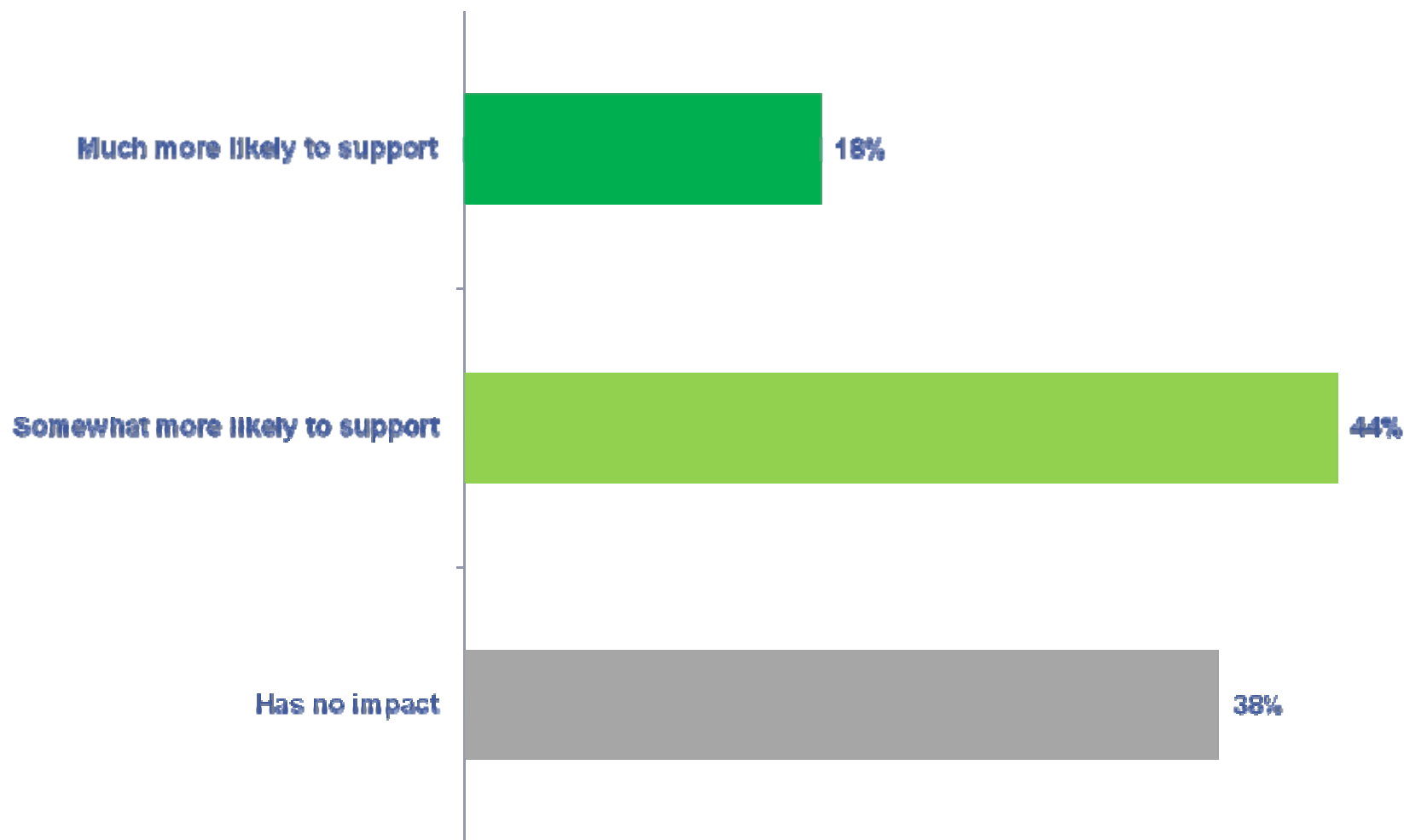
Attitudes Towards Certification on Hearing It Could Be a Tool for Gov't Regulators to Reward, Recognize and Leverage Sites: 85% Good Idea...



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On Hearing it Could Be a Tool for Gov't Regulators to Reward, Recognize and Leverage Sites, 62% Say they're More Likely to Support a Quarry/Aggregate Site in their Region/Municipality...

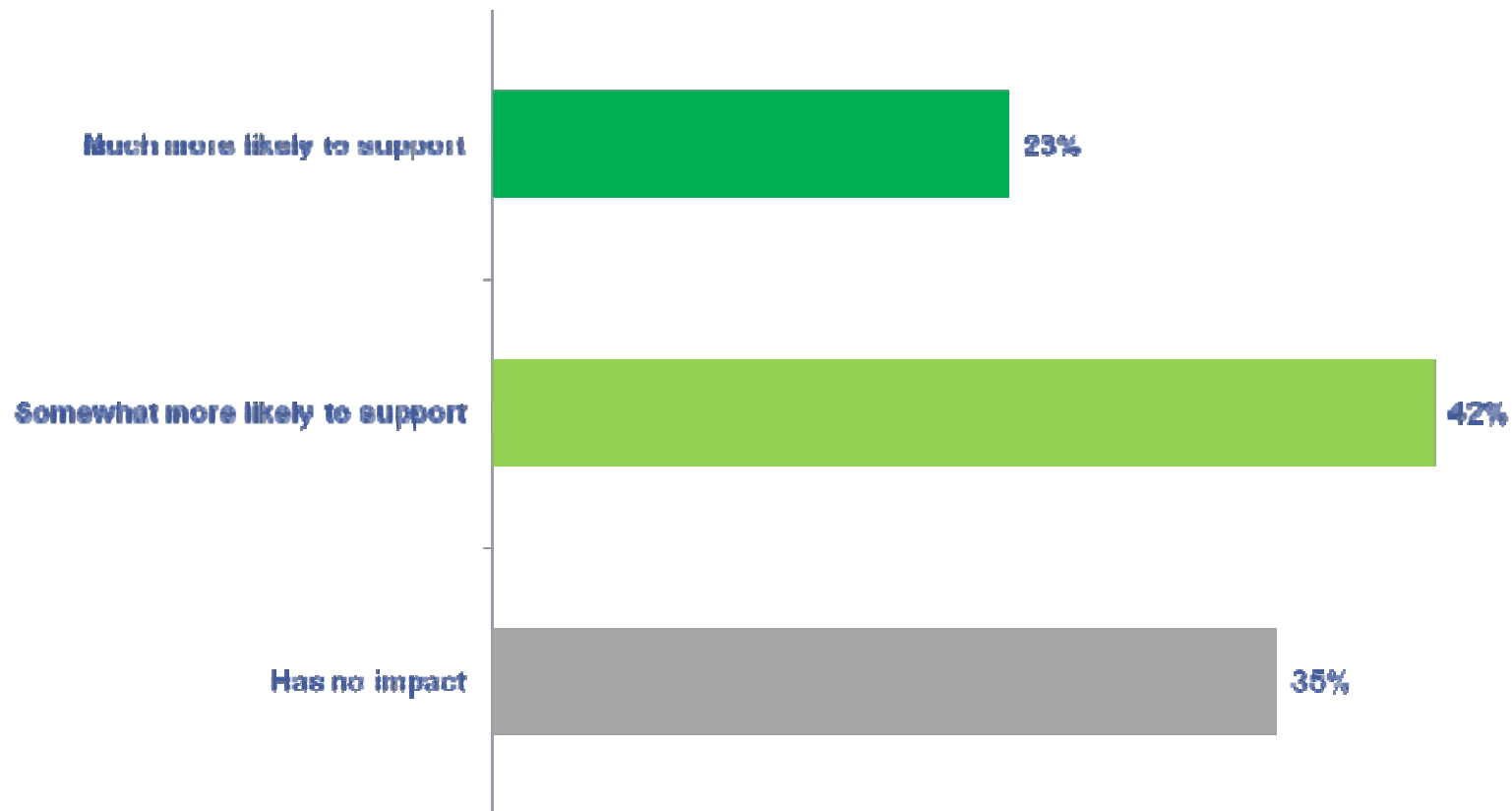


Impact on the 37%...



65% of the 37% Who Said They'd Not Support this Type of Business—Now Supportive with Certificate: Leaving Just 13% of Ontarians Still Not Supportive...

Results among those who agree that it isn't a business they support



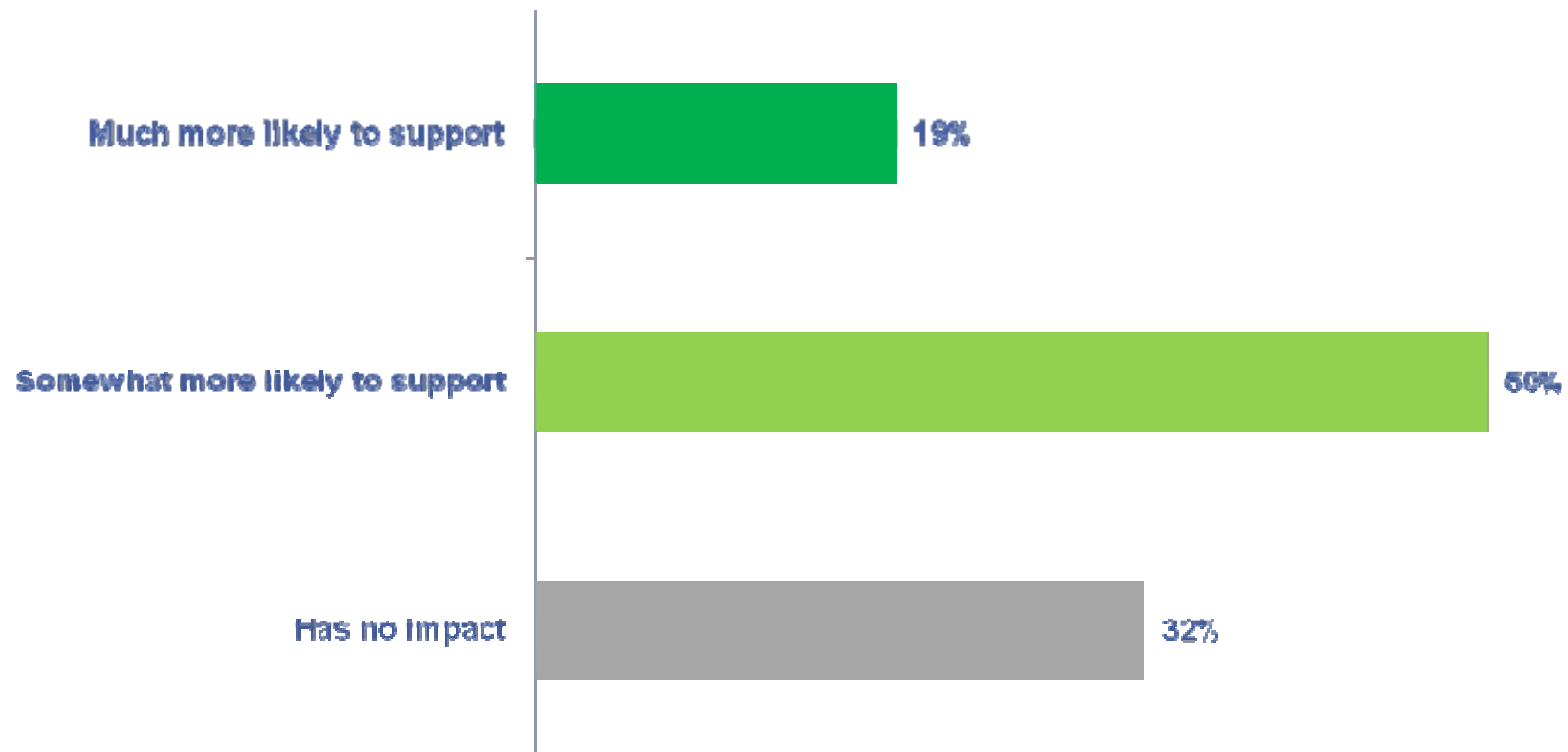
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Base: All Respondents (n=855)



And 69% of 37% Initially Opposed Now Onside with “leverage”: Just 12% of Ontarians Overall not Supportive for One in their Municipality/Region...

Results among those who agree that it isn't a business they support...



Conclusions



Conclusions...

- 37% initially opposed to having a quarry/aggregate site in their Municipality/Region drops to just one in 10 overall (13%/12%) of Ontarions when they learn about the possibility of a Certificate Program and its use and impact as a market – based tool to reward, recognize and leverage sites.
- As such, the program has traction in mitigating opposition and is viewed as a good idea for local leverage for Municipalities...
- A market-based tool for municipalities: added assurance for communities...



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