

Positive Energy Survey Findings

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Overview

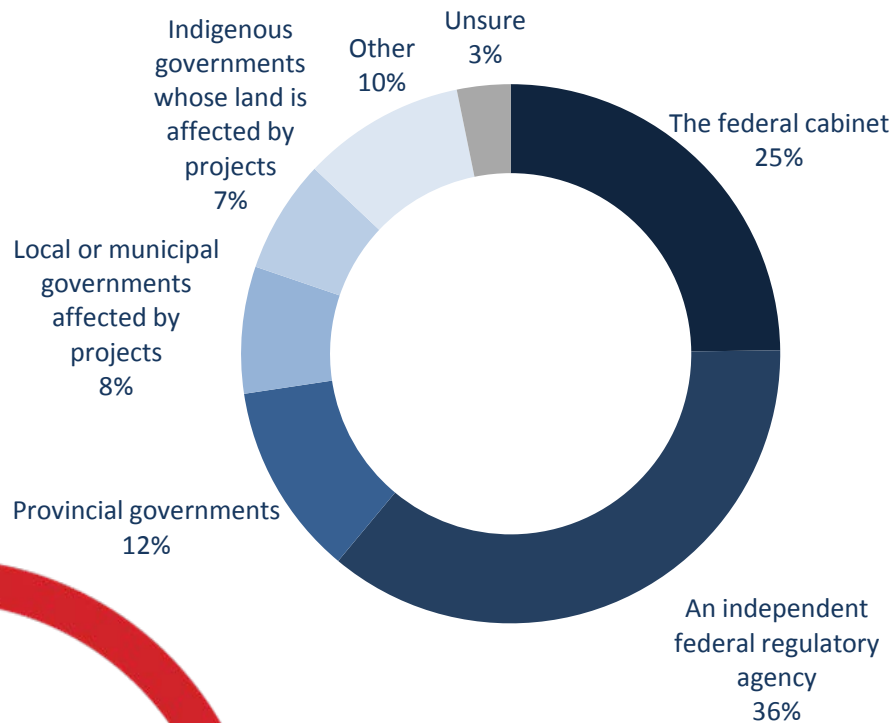
- 1000 Canadians Mar. 31 – Apr. 3
 - Also 2015, 2017 surveys
 - Margin of error: $\pm 3.1\%$, 95%
- 1. Energy projects: views on decision-making authority
- 2. Public confidence: assessing Canada's performance
- 3. Tradeoffs in energy decision-making
- 4. Canada's energy future
- 5. Concluding observations

1.0 Energy Projects: Views on decision-making authority



National Projects: Final decision-making power

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	An independent federal regulatory agency
Atlantic (n=100)	34.2%
Quebec (n=250)	33.7%
Ontario (n=300)	37.9%
Prairies (n=200)	41.5%
British Columbia (n=150)	31.4%
Male (n=518)	34.5%
Female (n=482)	38.0%
18 to 34 (n=185)	32.4%
35 to 54 (n=396)	37.1%
55 plus (n=419)	38.2%

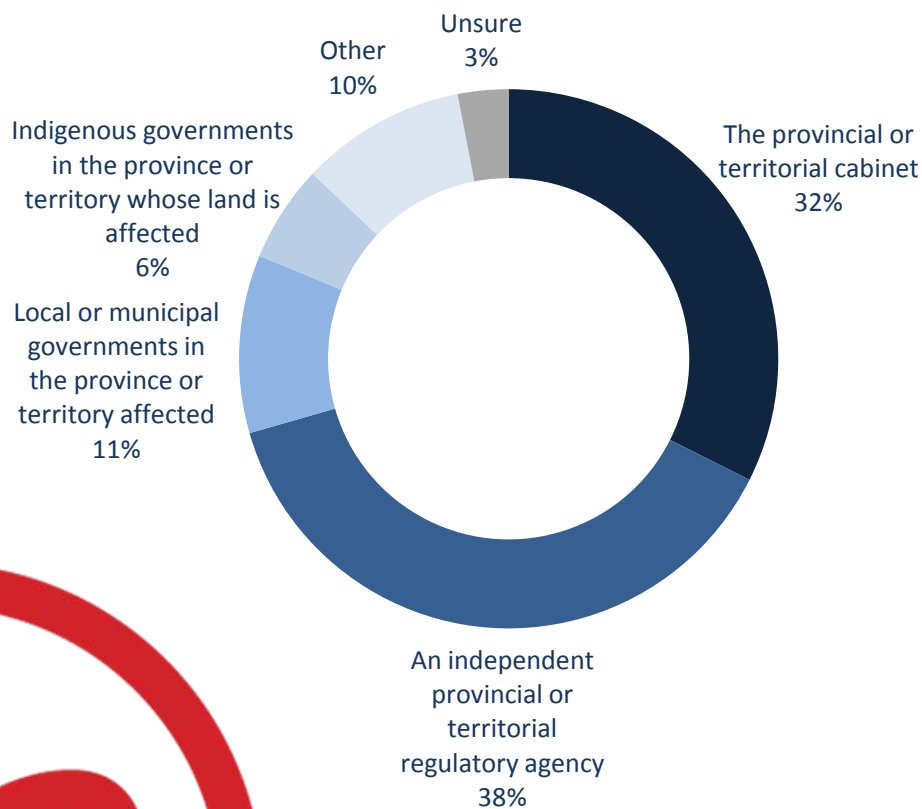
***Note: Charts may not add up to 100 due to rounding**

QUESTION – When it comes to major national energy projects, who should have the final decision-making power? [Randomize]

*National decision-making but how?
Independent Agency? (Policy-Regulatory Nexus)*

Provincial projects: Final decision-making power

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



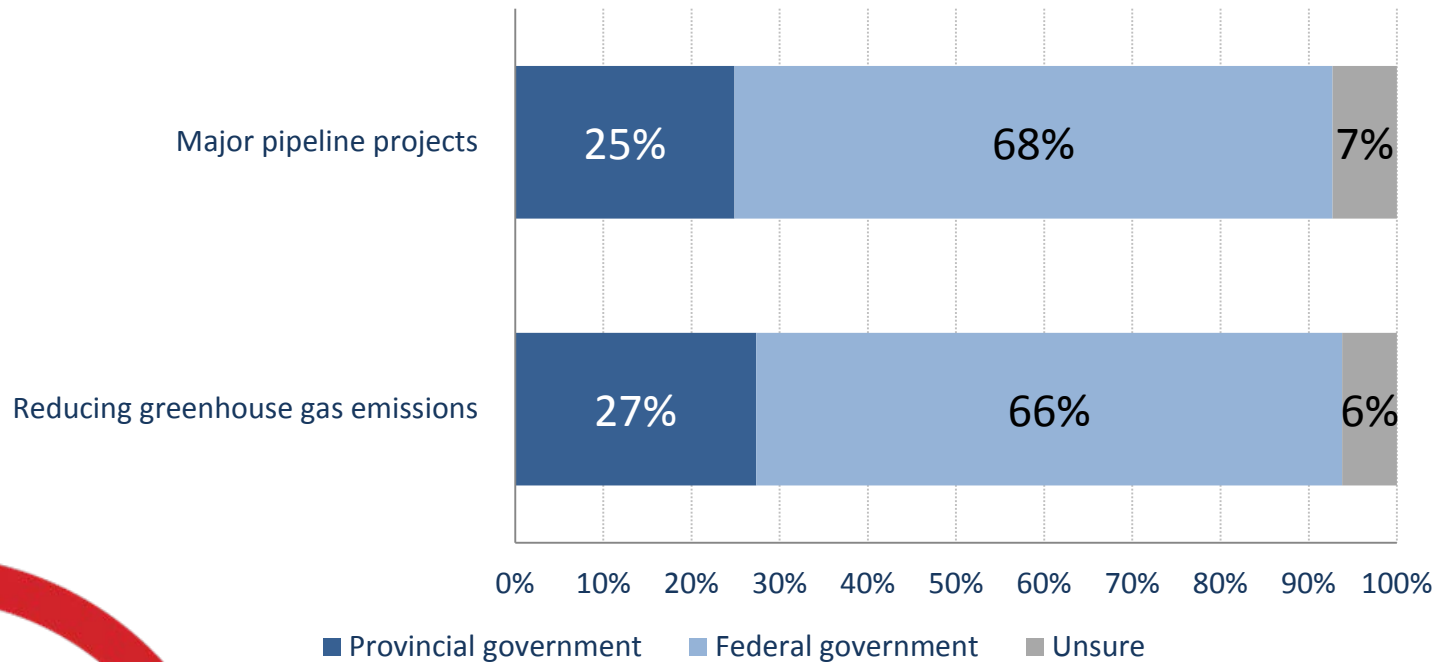
Subgroups	An independent provincial or territorial regulatory agency
Atlantic (n=100)	34.4%
Quebec (n=250)	41.6%
Ontario (n=300)	41.1%
Prairies (n=200)	38.4%
British Columbia (n=150)	28.8%
Male (n=518)	36.7%
Female (n=482)	39.5%
18 to 34 (n=185)	38.1%
35 to 54 (n=396)	38.8%
55 plus (n=419)	37.6%

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

QUESTION – When it comes to major provincial or territorial energy projects, who should have the final decision-making power? Please rank [RANDOMIZE]

National or Provincial: Pipeline, Climate

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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QUESTION – Should the [ROTATE] provincial or the federal level of government lead decision-making for

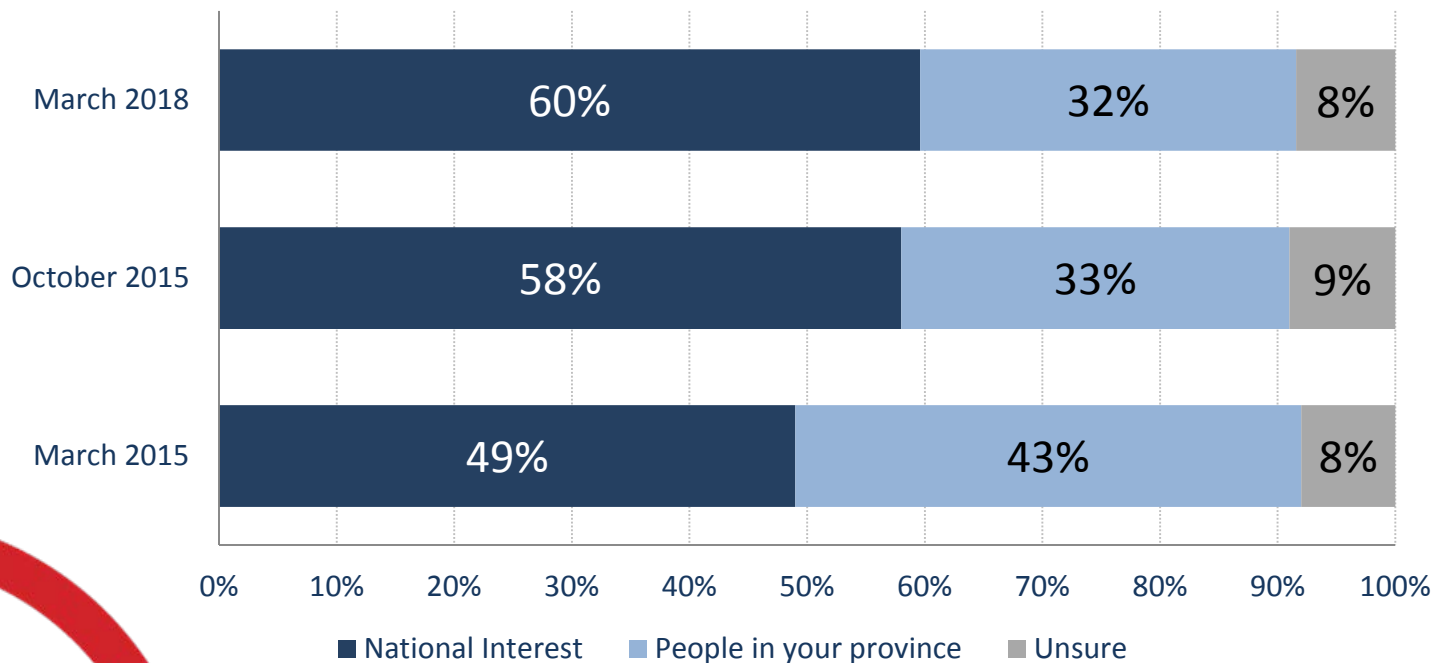
Québec Outlier: 49% Federal Independent Agency? (Policy-Regulatory Nexus)

National interest or province

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 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, October 15th to 16th, 2015, 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, March 2nd and 3rd, 2015, 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 – What is more important in a proposed energy project moving forward?

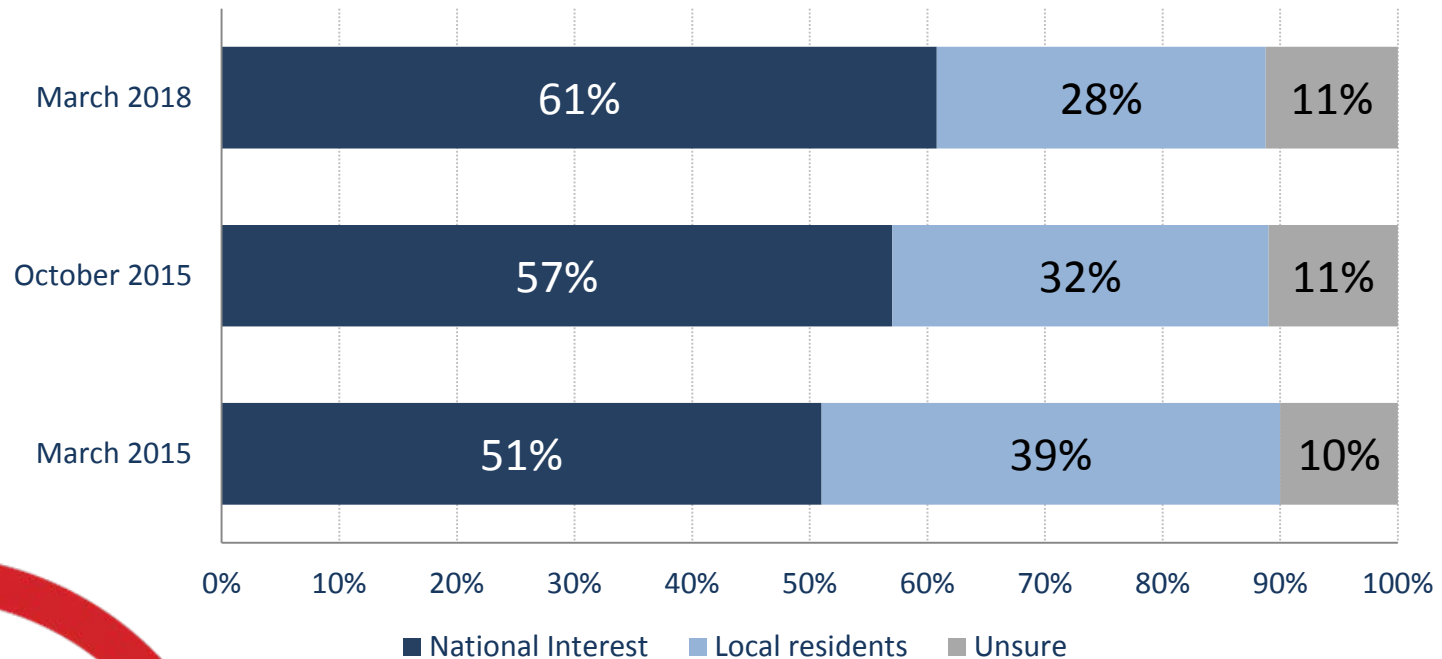
The national interest or the views of people in your province?

National interest or local residents

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 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, October 15th to 16th, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

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QUESTION – What is more important in a proposed energy project moving forward?

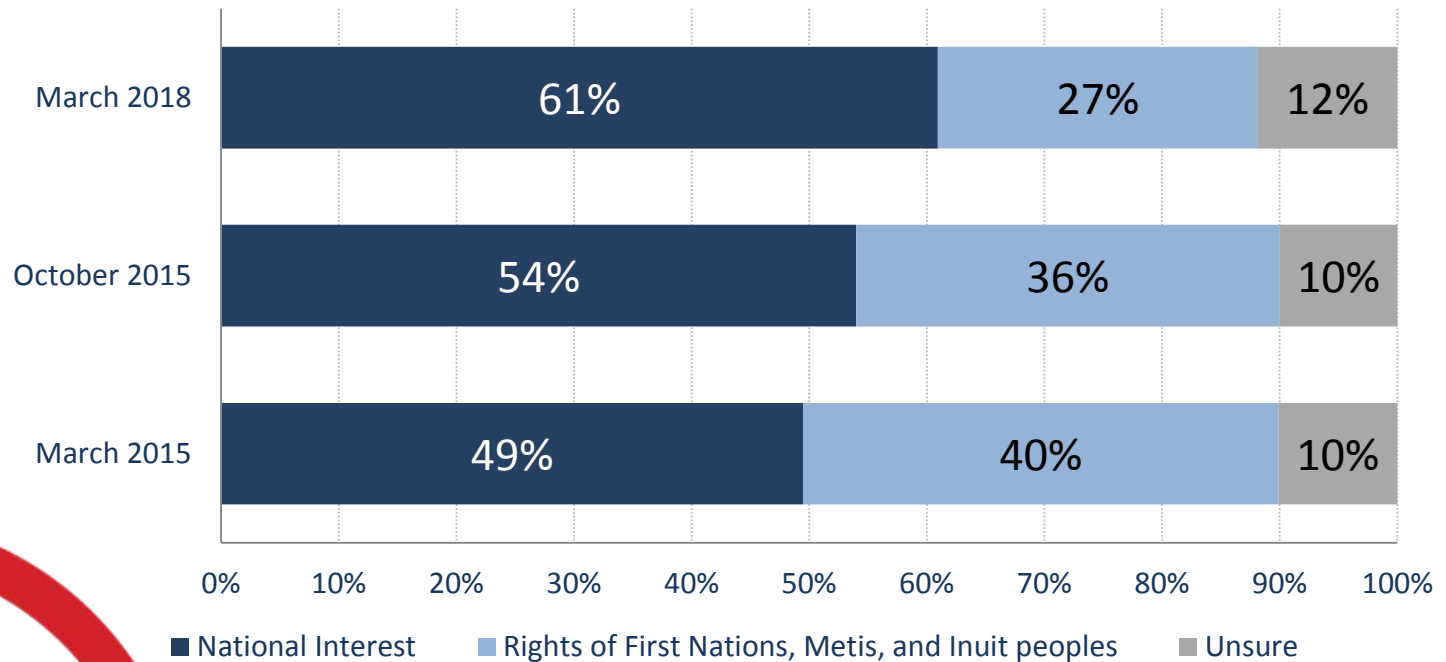
The national interest or the views of local residents?

National interest or Indigenous peoples

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

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QUESTION – What is more important in a proposed energy project moving forward?

The national interest or the rights of First Nations, Metis and Inuit peoples?

2.0 Public Confidence: Assessing Canada's performance



Assessing Performance

Does Canada do a very good, good, average, poor or very poor job at the following?
(net score results)

	2017	2018
Building public confidence in energy decision-making	-33	-50
Balancing the concerns of local communities affected by local energy projects w/ broader provincial, national goals	-22	-30
Developing a shared long-term vision for Canada's energy future	-24	-35
Ensuring benefits are distributed equitably across Canada	-33	-31
Providing a clear, predictable, and competitive policy and regulatory environment	-18	-34
Environmental policies on climate align with Canadian views	-44	-17

Future Work: Local or National - which is biased?

3.0 Trade-offs in energy decision-making

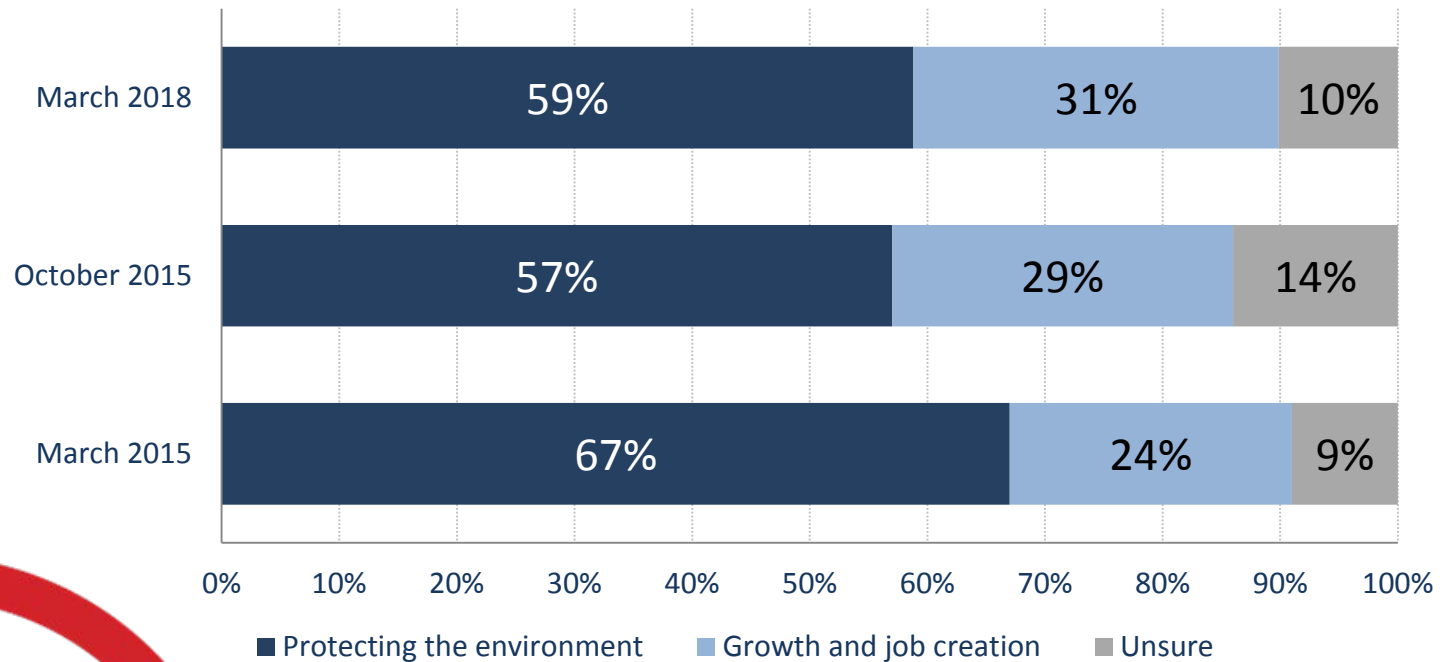


Economic growth vs. environment

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 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, October 15th to 16th, 2015, 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, March 2nd and 3rd, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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QUESTION – Which of the following two statements do you agree with most?
[ROTATE] Protecting the environment should be given priority, even if it causes slower economic growth and some loss of jobs OR growth and creating jobs should be the top priority, even if the environment suffers to some extent

Priority to environment

Economic partnerships with Indigenous and Local Communities

Companies should have economic partnerships with _____ communities even if:

	Indigenous	Local
Tax revenues to governments decrease	+6	+18
Fewer energy projects go forward	-6	+2
Energy Prices increase	-8	-3
There is less economic development in Canada	-13	-11
Canada gets less of its energy from domestic sources	-50	-43

Energy projects and environmental & social impacts

Canada should increase the range of environmental and social impacts it considers for energy projects even if it means:

	Local
Tax revenues to governments decrease	+22
Fewer energy projects go forward	+9
Energy prices increase	+6
There is less economic development in Canada	0
Canada gets less domestic energy	-44

Climate / Oil-gas Production Tradeoffs

Canada should _____, even if it means:

	Reduce oil & gas production	Meet its climate commitments
My community has more energy infrastructure (wind, solar, transmission, hydro)	+41	+55
Tax revenues decrease	-1	+24
Fewer energy projects go forward	-12	+10
Energy prices increase	-14	+7
There is less economic development in Canada	-21	-3
Canada has less domestic energy production and more from imports	-50	-28

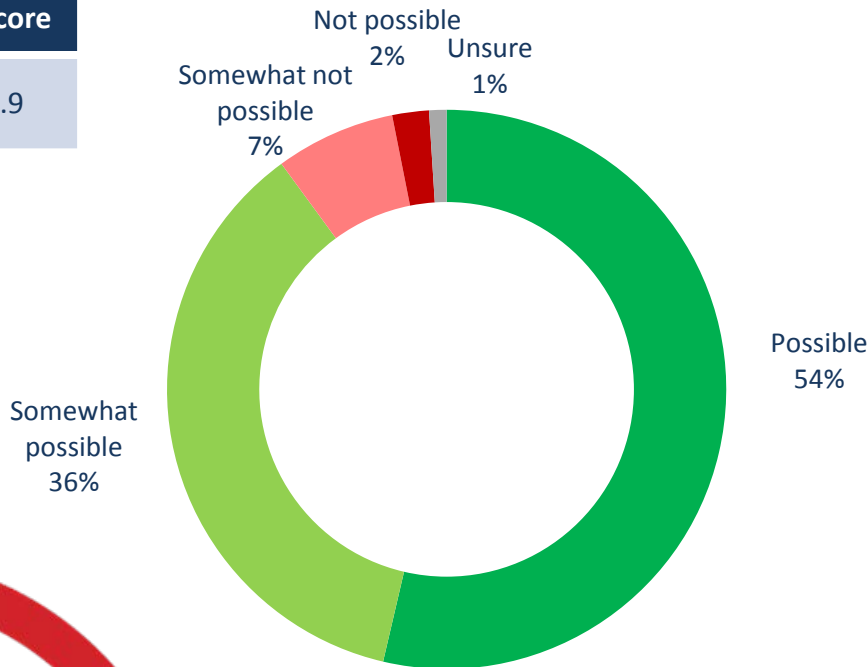
4.0 Canada's energy future



Possibility of developing Canadian energy sources while protecting environment

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+80.9



Subgroups	Possible/ Somewhat possible
Atlantic (n=100)	93.1%
Quebec (n=250)	86.2%
Ontario (n=300)	88.2%
Prairies (n=200)	95.7%
British Columbia (n=150)	89.8%
Male (n=518)	89.3%
Female (n=482)	90.6%
18 to 34 (n=185)	88.4%
35 to 54 (n=396)	89.1%
55 plus (n=419)	91.7%

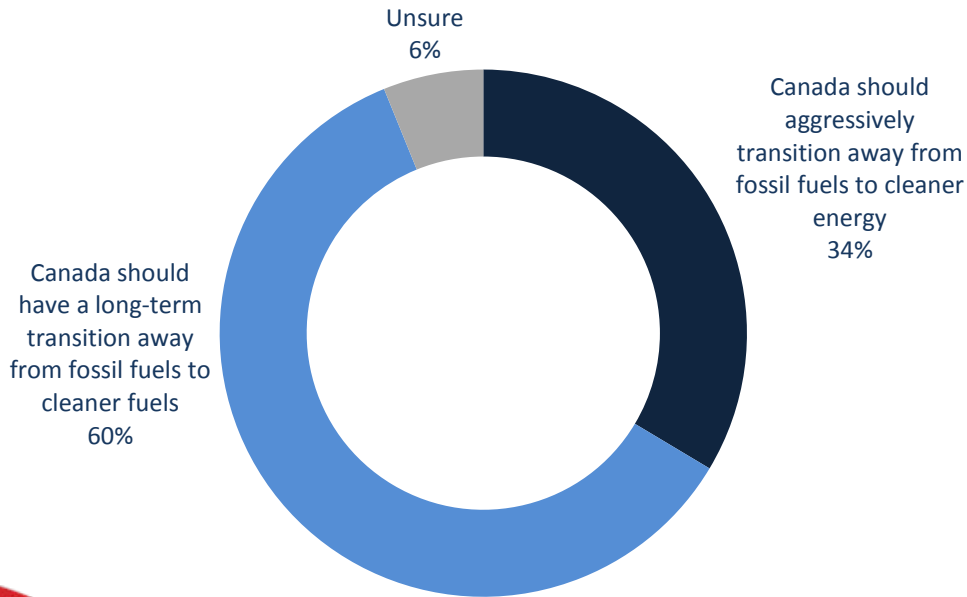
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QUESTION – Do you think it is possible, somewhat possible, somewhat not possible or not possible for Canada to develop its energy resources while protecting the environment?

Canadians are optimistic (overly so?)

Transitioning away from fossil fuels

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Long-term transition
Atlantic (n=100)	66.4%
Quebec (n=250)	40.9%
Ontario (n=300)	65.1%
Prairies (n=200)	72.3%
British Columbia (n=150)	62.9%
Male (n=518)	61.0%
Female (n=482)	59.6%
18 to 34 (n=185)	50.2%
35 to 54 (n=396)	62.3%
55 plus (n=419)	65.5%

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

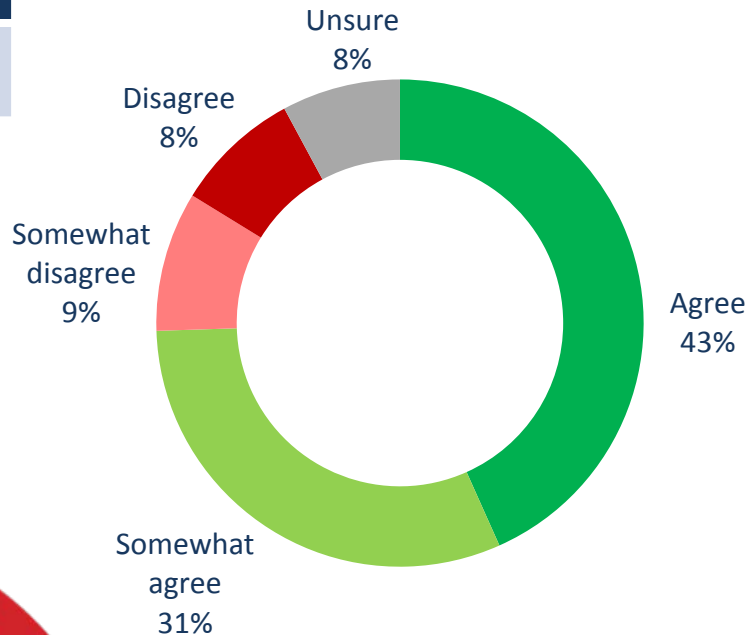
QUESTION – Which of the following is closer to your view? Canada should aggressively transition away from fossil fuels to cleaner energy OR Canada should have a long-term transition away from fossil fuels to cleaner fuels? [ROTATE]

Long term transition!

Oil and Gas Exports Can Combat Climate Change

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+56.8



Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	77.8%
Quebec (n=250)	71.1%
Ontario (n=300)	77.0%
Prairies (n=200)	77.3%
British Columbia (n=150)	69.0%
Male (n=518)	87.1%
Female (n=482)	71.0%
18 to 34 (n=185)	70.8%
35 to 54 (n=396)	72.4%
55 plus (n=419)	78.9%

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

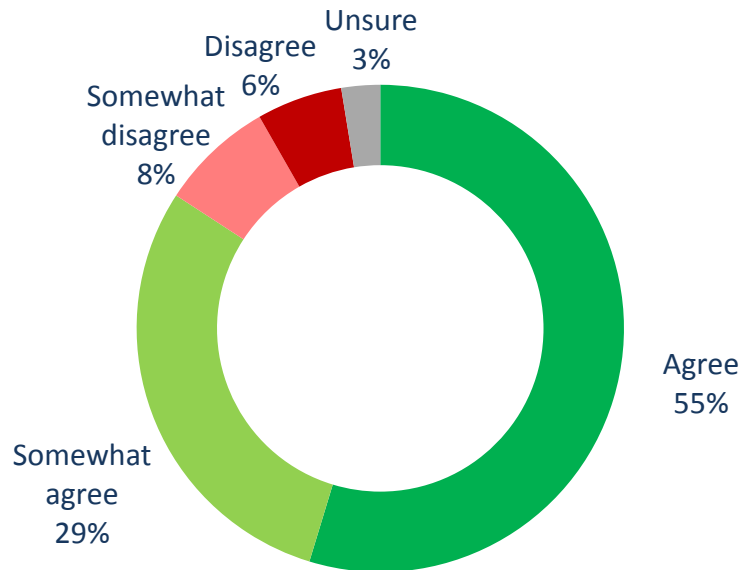
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

Exports from Canada’s oil and gas sector can contribute to combatting global climate change if our exports displace energy sources in other countries that are more damaging to the climate.

Long-term role for oil and gas sector if environmentally responsible

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+70.9



Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	87.9%
Quebec (n=250)	76.2%
Ontario (n=300)	83.5%
Prairies (n=200)	89.6%
British Columbia (n=150)	89.1%
Male (n=518)	86.8%
Female (n=482)	81.7%
18 to 34 (n=185)	76.3%
35 to 54 (n=396)	85.1%
55 plus (n=419)	88.9%

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

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

Canada’s oil and gas sector can play an important long-term role domestically and internationally if it operates in an environmentally responsible way.

Energy-Related Policies and Actions

Do you support, somewhat support, somewhat oppose or oppose the following?

	2017	2018
Negotiate energy accord w/ Indigenous peoples	+68	+61
Growth in the oil and gas sector	+22	+26
Encourage more oil refining	+60	+60
Growth in the renewable energy sector	+88	+88
Taxes on fossil fuels to support greener economy	+32	+16
A national policy framework for energy decisions	NA	+83
Create independent energy information agency	NA	+71

Québec & Female: Signif. less support for fossil-related actions

Key takeaways

1. Demographic differences:

- Québec versus Prairies: energy profile, culture
- Female-male
- Age

2. Decision Authority

- Needs to be Federal (or Provincial) in nature (indep. reg.?)
- But governments not performing well in key areas

3. Priorities & Tradeoffs

- Give: tax revenues, # of energy projects
- Priority: economic development, sourcing domestic energy

Key takeaways

4. Future

- **Optimism (but contradictions?)**
 - Environment & oil-gas production / long-term transition
 - Consistent with public opinion norms (not always rational)
- **High consensus! (but polarization lurks)**
 - Political courage to set priorities
 - Development of effective, independent, powerful institutions for decision-making (Pol-Reg Nexus)

Thank you – questions welcome
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