

Canadians more negative than positive about energy decision-making

University of Ottawa Positive Energy Summary - DRAFT

submitted by Nanos to Positive Energy, October 2017
(Submission 2017-1058)



Summary

When asked about Canada's energy performance in terms of building public confidence in decision-making, balancing concerns of communities, developing a long-term shared vision and providing a clear policy and regulatory environment for investors, Canadians were more likely to say that Canada is doing a poor or very poor job. When it comes to potential recommendations for resolving the struggle to determine who decides on energy development questions, eight in ten Canadians agreed or somewhat agreed that Canada needs to better manage the cumulative effects of multiple projects to provide greater clarity for local and Indigenous governments and for investors.

Opinions on Canada's energy performance

- **Half of Canadians think that Canada does a poor or very poor job of building public confidence in energy decision-making** – When asked how well Canada does at building public confidence in energy decision-making, half of Canadians think it does a poor (30%) or very poor (20%) job, while 30 per cent say an average job. Less than one in five Canadians say that Canada does a good (15%) or very good (two per cent) job in this regard. Three per cent are unsure.
- **Two fifths of Canadians think that Canada does a poor or very poor job of balancing the concerns of local communities affected by a local infrastructure project with broader interests compared to a fifth who think it does a good or very good job** – When asked how well Canada does at balancing the concerns of local communities affected by a local infrastructure project with broader regional, provincial or national interests, four in ten think it does a poor (22%) or very poor (18%) job. Less than one in five say that Canada does a good (16%) or very good (two per cent) job, while 34 per cent say an average job. Eight per cent are unsure.
- **Twice as many Canadians think Canada does a poor or very poor job of developing a shared long-term vision for Canada's energy future as think it is doing a good or very good job** – When asked how well Canada does at developing a shared long-term vision for Canada's energy future, over four in ten Canadians think it does a poor (26%) or very poor (17%) job. One in five say that Canada does a good (17%) or very good (three per cent) job, and 32 per cent say an average job. Five per cent are unsure.
- **More Canadians think Canada does a poor or very poor job of providing a clear, predictable and competitive policy and regulatory environment for energy investors than think it is doing a good or very good job** – When asked how well Canada does at providing a clear, predictable and competitive policy and regulatory environment for energy investors, just under four in ten Canadians say it does a poor (23%) or very poor (14%) job, while 30 per cent say an average job. Less than one in five Canadians says that Canada does a good (16%) or very good (three per cent) job in this regard. Fifteen per cent are unsure.

Potential recommendations for Canada and energy development

- **Eight in ten Canadians agree or somewhat agree that Canada needs to better manage the cumulative effects of multiple projects to provide greater clarity for local and Indigenous governments and for investors** – When asked their level of agreement with the statement that Canada needs to better manage the cumulative effects of multiple projects to provide greater clarity for local and Indigenous governments and for investors, the vast majority of Canadians say they agree (44%) or somewhat agree (37%), while just over one in ten Canadians disagrees (six per cent) or somewhat disagrees (seven per cent). Six per cent are unsure.
- **Seven in ten Canadians agree or somewhat agree that the ‘final say’ on projects like pipelines or power lines crossing multiple communities should rest in the hands of federal or provincial/territorial governments** – When asked their level of agreement with the statement that the ‘final say’ on projects like pipelines or power lines crossing multiple communities should rest in the hands of federal or provincial/territorial governments, the majority of Canadians agree (39%) or somewhat agree (31%), while just over one in four Canadians disagree (11%) or somewhat disagree (16%). Three per cent are unsure.
- **Two in three Canadians agree or somewhat agree that authority should be shared between municipal, Indigenous and federal/provincial/territorial governments when it comes to energy infrastructure projects** – When asked their level of agreement with the statement that authority should be shared between municipal, Indigenous and federal/provincial/territorial governments when it comes to energy infrastructure projects, the majority of Canadians agree (34%) or somewhat agree (34%), while just under one in three Canadians disagrees (15%) or somewhat disagrees (15%). Two per cent are unsure.
- **Just over six in ten Canadians agree or somewhat agree that Canada needs to substantially strengthen the capacity for local governments to regulate and shape energy development** – When asked their level of agreement with the statement that Canada needs to substantially strengthen the capacity for local governments to regulate and shape energy development, the majority of Canadians agree (22%) or somewhat agree (39%), while just over one in three Canadians disagrees (15%) or somewhat disagrees (19%). Five per cent are unsure.
- **Half of Canadians agree or somewhat agree that Canada needs to substantially strengthen the capacity for indigenous governments to regulate and shape energy development** – When asked their level of agreement with the statement that Canada needs to substantially strengthen the capacity for indigenous governments to regulate and shape energy development, half of Canadians agree (22%) or somewhat agree (28%), just under half of Canadians disagrees (26%) or somewhat disagrees (20%). Five per cent are unsure.

These observations are based on a hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between September 23rd and 26th, 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.

This study was commissioned by University of Ottawa Positive Energy and conducted by Nanos Research.

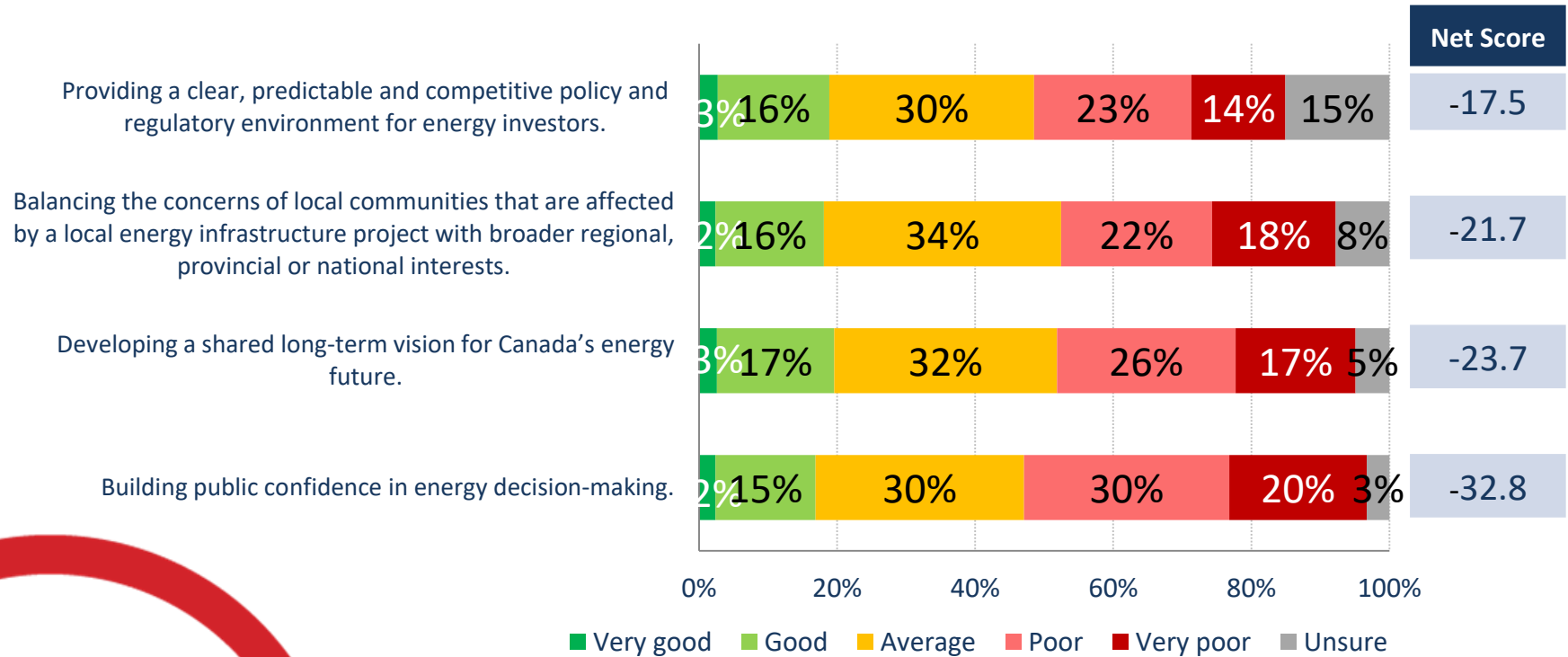
At a glance

How Canada does in	Very poor/ poor job	Good/ very good job
Building public confidence in energy decision-making.	49.7%	16.9%
Developing a shared long-term vision for Canada's energy future	43.3%	19.6%
Balancing the concerns of local communities that are affected by a local energy infrastructure project with broader regional, provincial or national interests	39.8%	18.1%
Providing a clear, predictable and competitive policy and regulatory environment for energy investors.	36.4%	18.9%

Recommendations	Agree/ somewhat agree	Disagree/ somewhat disagree
Canada needs to substantially strengthen the capacity for indigenous governments to regulate and shape energy development	49.6%	45.6%
Canada needs to substantially strengthen the capacity for local governments to regulate and shape energy development	60.8%	33.8%
Authority should be shared between municipal, Indigenous and federal/provincial/territorial governments when it comes to energy infrastructure projects.	68.0%	29.7%
The 'final say' on projects like pipelines or power lines crossing multiple communities should rest in the hands of federal or provincial/territorial governments.	70.3%	26.9%
Canada needs to better manage the cumulative effects of multiple projects to provide greater clarity for local and Indigenous governments and for investors.	80.7%	13.1%

Opinions on Canada's energy performance

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 23rd to 26th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



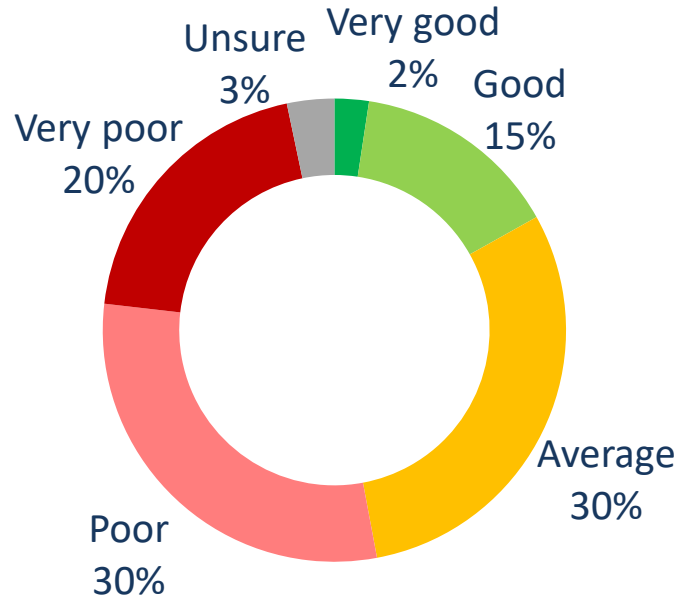
*Note: Charts may not add up to 100 due to rounding

QUESTION – Do you think Canada in general does a very good, good, average, poor or very poor job at the following [ROTATE]

Building public confidence in energy decision-making

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 23rd to 26th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
-32.8



Subgroups	Poor/ Very poor
Atlantic (n=100)	42.9%
Quebec (n=250)	41.2%
Ontario (n=300)	53.2%
Prairies (n=200)	57.7%
British Columbia (n=150)	50.8%
Male (n=504)	53.0%
Female (n=496)	46.5%
18 to 34 (n=208)	47.2%
35 to 54 (n=390)	51.0%
55 plus (n=402)	50.4%

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

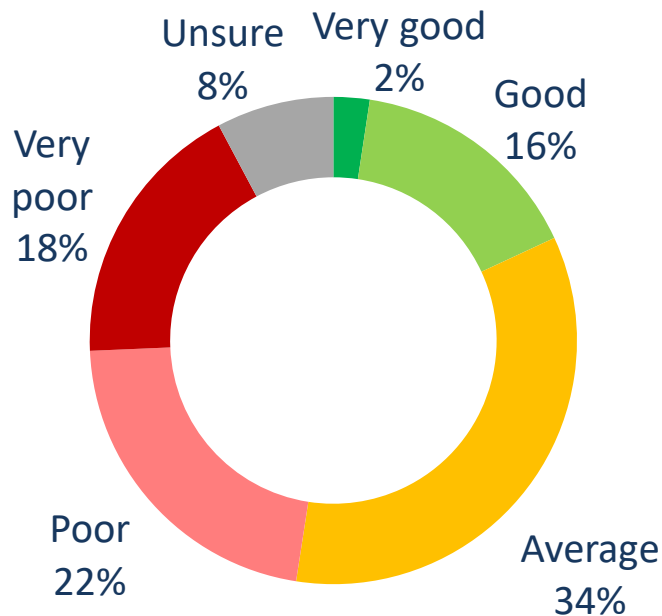
QUESTION – Do you think Canada in general does a very good, good, average, poor or very poor job at the following [ROTATE]:

Building public confidence in energy decision-making.

Balancing the concerns of local communities with broader interests

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 23rd to 26th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
-21.7



Subgroups	Poor/ Very poor
Atlantic (n=100)	33.0%
Quebec (n=250)	35.2%
Ontario (n=300)	40.3%
Prairies (n=200)	46.5%
British Columbia (n=150)	42.0%
Male (n=504)	42.4%
Female (n=496)	37.3%
18 to 34 (n=208)	37.0%
35 to 54 (n=390)	42.9%
55 plus (n=402)	38.9%

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

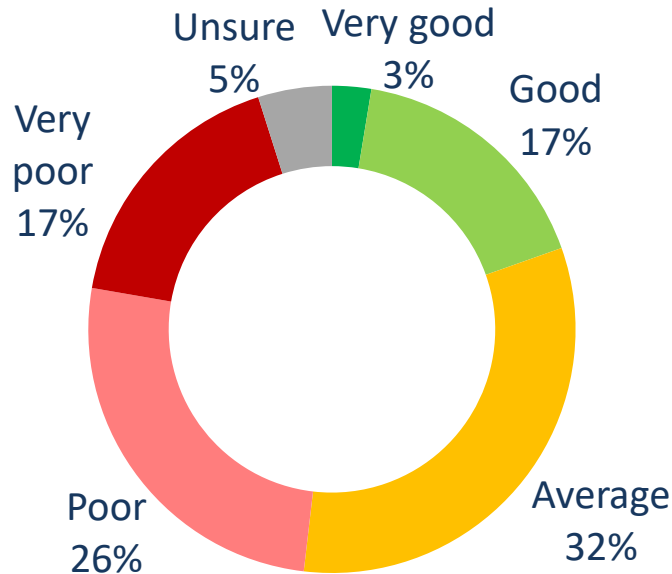
QUESTION – Do you think Canada in general does a very good, good, average, poor or very poor job at the following [ROTATE]:

Balancing the concerns of local communities that are affected by a local energy infrastructure project with broader regional, provincial or national interests.

Developing a shared long-term vision for Canada's energy future

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 23rd to 26th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
-23.7



Subgroups	Poor/ Very poor
Atlantic (n=100)	36.8%
Quebec (n=250)	33.5%
Ontario (n=300)	43.8%
Prairies (n=200)	55.5%
British Columbia (n=150)	46.6%
Male (n=504)	45.7%
Female (n=496)	41.0%
18 to 34 (n=208)	38.8%
35 to 54 (n=390)	46.0%
55 plus (n=402)	44.0%

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

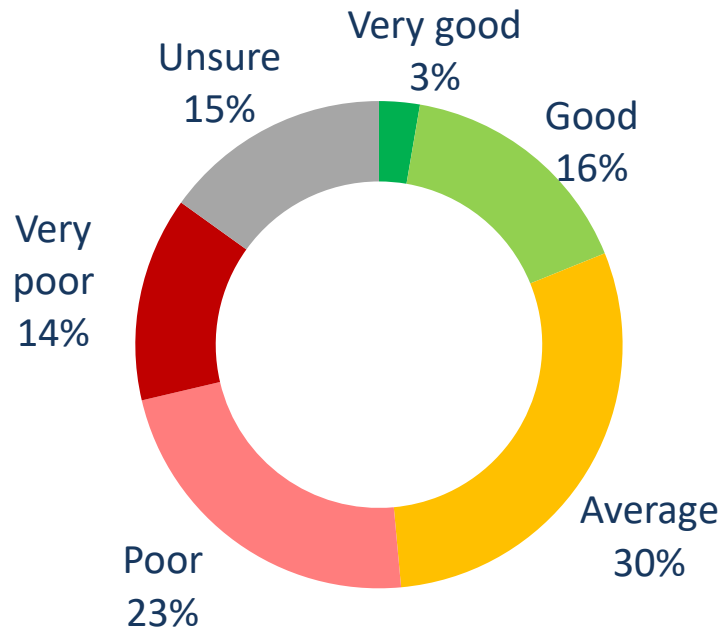
QUESTION – Do you think Canada in general does a very good, good, average, poor or very poor job at the following [ROTATE]:

Developing a shared long-term vision for Canada's energy future.

Providing a clear policy and regulatory environment for energy investors

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 23rd to 26th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
-17.5



Subgroups	Poor/ Very poor
Atlantic (n=100)	25.1%
Quebec (n=250)	34.0%
Ontario (n=300)	36.8%
Prairies (n=200)	42.4%
British Columbia (n=150)	38.6%
Male (n=504)	42.1%
Female (n=496)	30.8%
18 to 34 (n=208)	29.1%
35 to 54 (n=390)	41.1%
55 plus (n=402)	37.2%

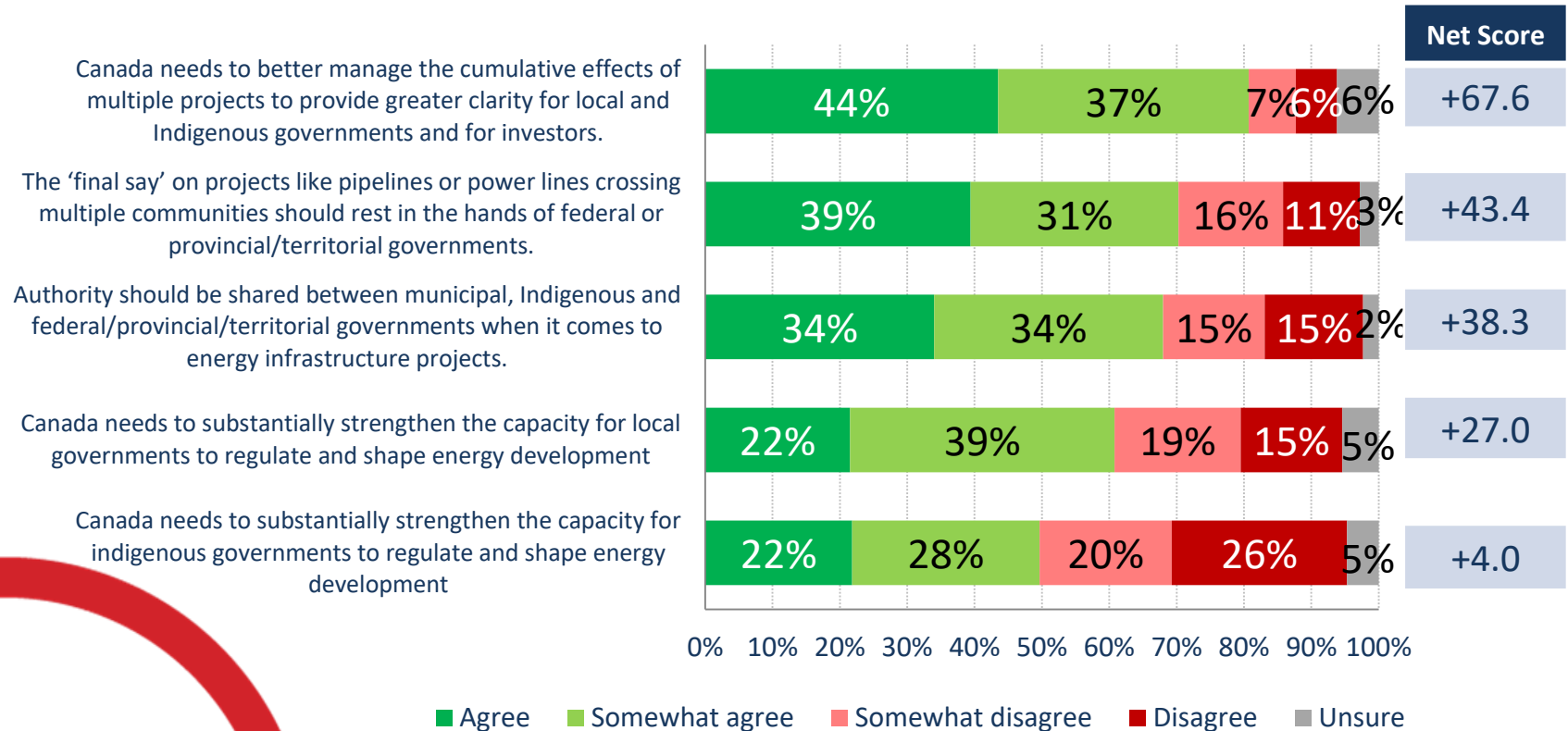
*Note: Charts may not add up to 100 due to rounding

QUESTION – Do you think Canada in general does a very good, good, average, poor or very poor job at the following [ROTATE]:

Providing a clear, predictable and competitive policy and regulatory environment for energy investors.

Potential recommendations for Canada and energy development

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 23rd to 26th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



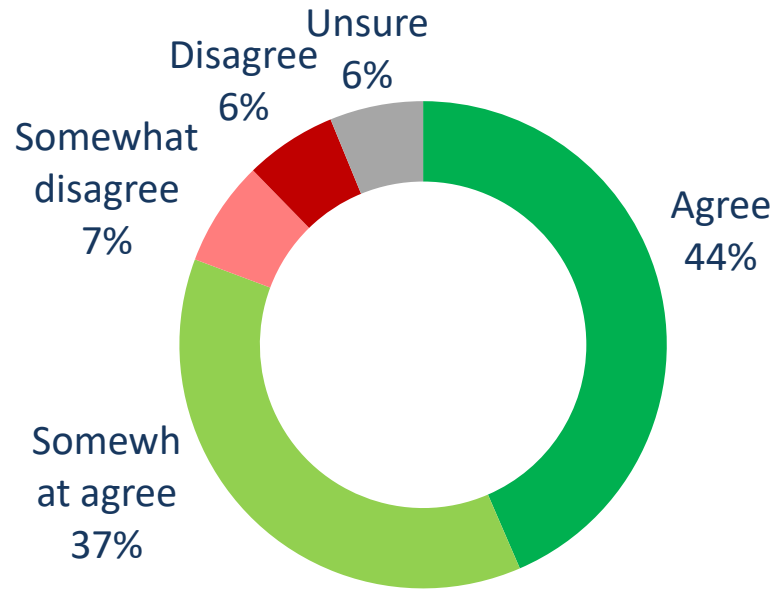
*Note: Charts may not add up to 100 due to rounding

QUESTION – Some say Canada has struggled with ‘Who Decides?’ when it comes to energy development: municipalities and Indigenous governments, or provincial and federal governments. I’m going to read a list of potential recommendations to resolve this challenge. Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

Better management of cumulative effects of multiple projects

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 23rd to 26th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+67.6



Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	75.4%
Quebec (n=250)	86.6%
Ontario (n=300)	82.4%
Prairies (n=200)	71.9%
British Columbia (n=150)	82.7%
Male (n=504)	76.7%
Female (n=496)	84.5%
18 to 34 (n=208)	84.1%
35 to 54 (n=390)	76.7%
55 plus (n=402)	81.8%

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

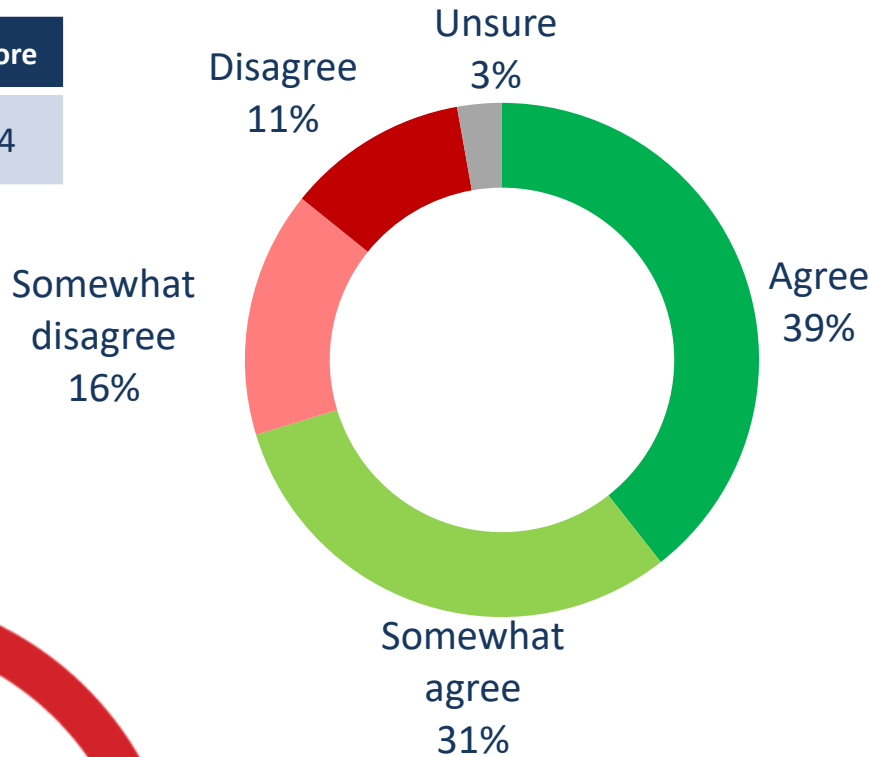
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

Canada needs to better manage the cumulative effects of multiple projects to provide greater clarity for local and Indigenous governments and for investors.

Final say on projects resting in the hands of federal or provincial/territorial governments

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 23rd to 26th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+43.4



Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	75.4%
Quebec (n=250)	63.7%
Ontario (n=300)	72.7%
Prairies (n=200)	77.1%
British Columbia (n=150)	64.0%
Male (n=504)	76.8%
Female (n=496)	64.0%
18 to 34 (n=208)	69.6%
35 to 54 (n=390)	69.4%
55 plus (n=402)	71.6%

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

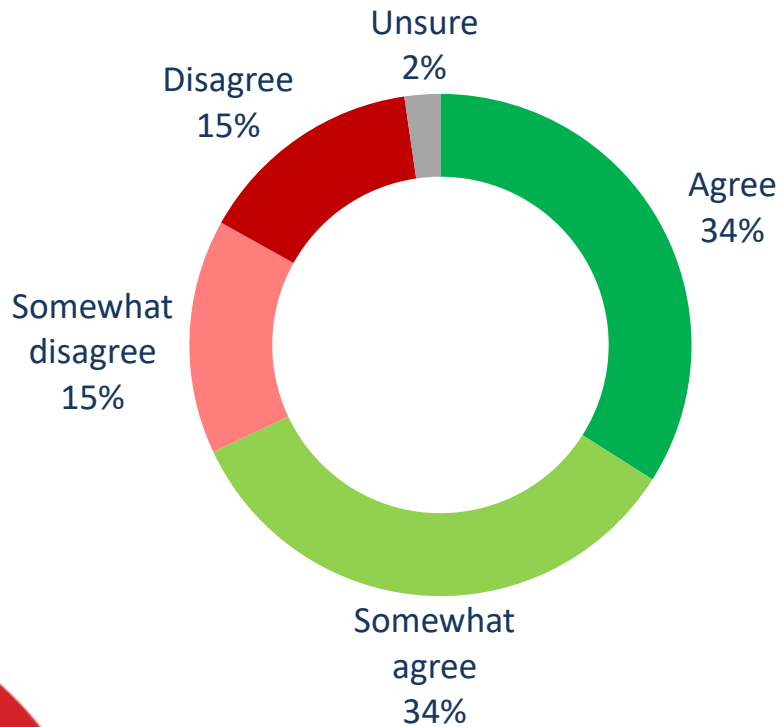
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

The ‘final say’ on projects like pipelines or power lines crossing multiple communities should rest in the hands of federal or provincial/territorial governments.

Authority for energy projects being shared between all governments

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 23rd to 26th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+38.3



Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	68.3%
Quebec (n=250)	75.6%
Ontario (n=300)	71.1%
Prairies (n=200)	57.9%
British Columbia (n=150)	62.3%
Male (n=504)	61.4%
Female (n=496)	74.4%
18 to 34 (n=208)	74.3%
35 to 54 (n=390)	64.3%
55 plus (n=402)	66.9%

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

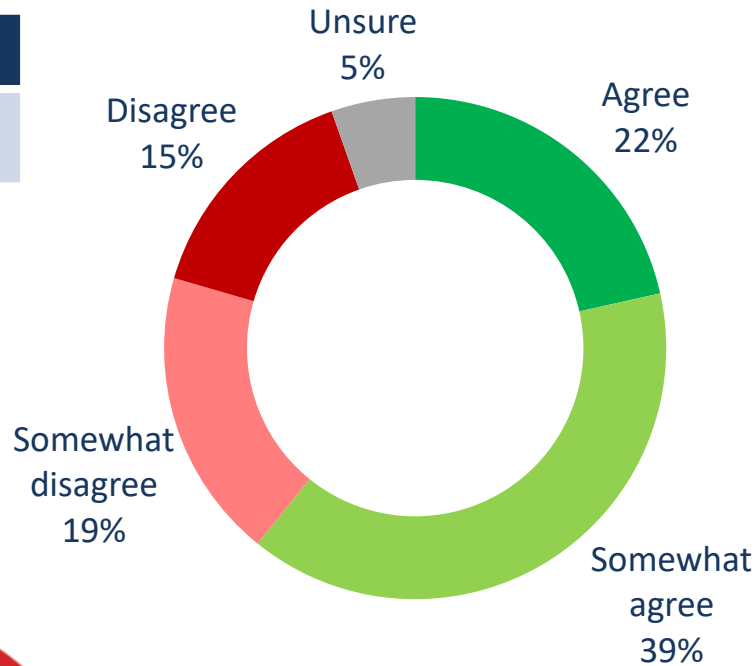
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

Authority should be shared between municipal, Indigenous and federal/provincial/territorial governments when it comes to energy infrastructure projects.

Strengthening capacity for local governments to regulate energy development

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 23rd to 26th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+27.0



Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	68.2%
Quebec (n=250)	65.7%
Ontario (n=300)	57.5%
Prairies (n=200)	58.5%
British Columbia (n=150)	57.9%
Male (n=504)	57.1%
Female (n=496)	64.5%
18 to 34 (n=208)	65.3%
35 to 54 (n=390)	57.8%
55 plus (n=402)	60.6%

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

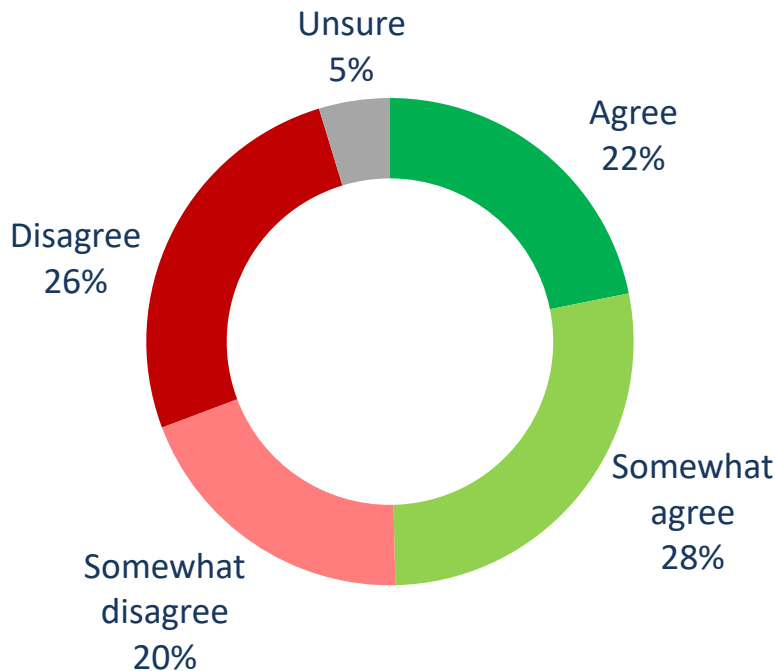
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

Canada needs to substantially strengthen the capacity for local governments to regulate and shape energy development

Strengthening capacity for Indigenous governments to regulate energy development

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 23rd to 26th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+4.0



Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	46.3%
Quebec (n=250)	54.6%
Ontario (n=300)	52.6%
Prairies (n=200)	40.3%
British Columbia (n=150)	49.8%
Male (n=504)	39.9%
Female (n=496)	58.8%
18 to 34 (n=208)	56.5%
35 to 54 (n=390)	44.5%
55 plus (n=402)	49.2%

***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 needs to substantially strengthen the capacity for indigenous governments to regulate and shape energy development



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 23rd and 26th, 2017 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 University of Ottawa Positive Energy.

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



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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Technical Note

Element	Description	Element	Description
Organization who commissioned the research	University of Ottawa Positive Energy	Weighting of Data	The results were weighted by age and gender using the latest Census information (2014) 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 (2014) 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	14% 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 as per the MRIA Code of Conduct	Question Content	This was module five of an omnibus survey. Preceding modules asked about the top unprompted national issue of concern, government policies, extreme weather, tax policies and wildlife conservation.
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 23 rd to 26 th , 2017.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanosresearch.com Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.
Language of Survey	The survey was conducted in both English and French.		



Tabulations

Confidential



2017-1058 – Positive Energy – Balancing Indigenous and Energy Interests – STAT SHEET

Do you think Canada in general does a very good, good, average, poor or very poor job at the following [ROTATE]:

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Building public confidence in energy decision-making	Total	Unwgt N	1000	100	250	300	200	150	504	496	208	390	402
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Very good	%	2.4	1.1	4.4	1.6	2.4	1.2	2.8	2.0	3.4	1.5	2.4
	Good	%	14.5	13.3	18.5	13.6	11.2	14.5	12.9	15.9	14.2	11.4	17.3
	Average	%	30.2	39.7	32.0	27.7	25.2	32.5	28.9	31.4	31.0	33.2	27.1
	Poor	%	29.8	29.0	24.1	33.1	32.1	29.9	28.9	30.6	30.5	26.9	31.8
	Very poor	%	19.9	13.9	17.1	20.1	25.6	20.9	24.1	15.9	16.7	24.1	18.6
	Unsure	%	3.3	3.1	3.8	3.8	3.5	1.1	2.4	4.1	4.2	2.9	2.9

Do you think Canada in general does a very good, good, average, poor or very poor job at the following [ROTATE]:

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Balancing the concerns of local communities that are affected by a local energy infrastructure project with broader regional, provincial or national interests	Total	Unwgt N	1000	100	250	300	200	150	504	496	208	390	402
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Very good	%	2.4	1.0	3.0	2.0	3.5	1.8	2.6	2.2	1.6	2.0	3.3
	Good	%	15.7	20.0	16.6	13.4	12.4	20.2	17.0	14.4	15.7	13.6	17.4
	Average	%	34.4	38.7	35.8	35.7	30.5	31.8	31.9	36.8	36.3	32.6	34.6
	Poor	%	21.9	24.0	18.7	21.6	24.5	23.0	21.6	22.2	19.7	22.2	23.1
	Very poor	%	17.9	9.0	16.5	18.7	22.0	19.0	20.8	15.1	17.3	20.7	15.8
	Unsure	%	7.8	7.3	9.5	8.7	7.2	4.1	6.2	9.2	9.4	8.8	5.6

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 23rd and 26th, 2017. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20.

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2017-1058 – Positive Energy – Balancing Indigenous and Energy Interests – STAT SHEET

Do you think Canada in general does a very good, good, average, poor or very poor job at the following [ROTATE]:

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Developing a shared long-term vision for Canada's energy future	Total	Unwgt N	1000	100	250	300	200	150	504	496	208	390	402
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Very good	%	2.6	3.1	3.8	2.0	2.7	1.2	2.2	2.9	3.6	2.1	2.2
	Good	%	17.0	18.4	21.4	16.4	12.3	16.0	16.6	17.3	15.8	16.0	18.6
	Average	%	32.3	36.3	35.6	32.8	25.2	33.0	32.7	32.0	34.8	30.6	32.1
	Poor	%	25.9	23.9	21.1	27.3	29.5	27.6	24.5	27.3	23.0	26.1	27.7
	Very poor	%	17.4	12.9	12.4	16.5	26.0	19.0	21.2	13.7	15.8	19.9	16.3
	Unsure	%	4.9	5.4	5.7	5.2	4.4	3.2	2.9	6.8	7.1	5.2	3.1

Do you think Canada in general does a very good, good, average, poor or very poor job at the following [ROTATE]:

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Providing a clear, predictable and competitive policy and regulatory environment for energy investors	Total	Unwgt N	1000	100	250	300	200	150	504	496	208	390	402
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Very good	%	2.7	4.0	4.0	2.3	1.7	1.8	2.9	2.5	2.5	2.4	3.1
	Good	%	16.2	21.7	18.1	13.6	13.2	18.7	15.4	17.0	17.1	13.5	17.9
	Average	%	29.7	34.5	28.8	32.1	24.5	29.9	27.8	31.5	28.6	29.6	30.5
	Poor	%	22.8	15.2	23.6	23.0	21.2	28.0	24.6	21.0	20.5	21.7	25.3
	Very poor	%	13.6	9.9	10.4	13.8	21.2	10.6	17.5	9.8	8.6	19.4	11.9
Unsure	%	15.1	14.6	15.0	15.3	18.1	11.0	11.8	18.3	22.7	13.3	11.3	

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

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Canada needs to better manage the cumulative effects of multiple projects to provide greater clarity for local and Indigenous governments and for investors	Total	Unwgt N	1000	100	250	300	200	150	504	496	208	390	402
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Agree	%	43.5	37.7	48.8	44.1	39.2	42.9	37.4	49.3	46.2	39.9	44.7
	Somewhat agree	%	37.2	37.7	37.8	38.3	32.7	39.8	39.3	35.2	37.9	36.8	37.1
	Somewhat disagree	%	7.0	8.8	3.6	6.3	11.3	7.5	9.7	4.5	4.6	8.2	7.7
	Disagree	%	6.1	5.4	4.8	5.0	9.3	6.3	8.6	3.6	4.1	8.6	5.2
	Unsure	%	6.2	10.4	5.0	6.3	7.5	3.4	5.0	7.3	7.3	6.4	5.3

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

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - The 'final say' on projects like pipelines or power lines crossing multiple communities should rest in the hands of federal or provincial/territorial governments	Total	Unwgt N	1000	100	250	300	200	150	504	496	208	390	402
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Agree	%	39.4	36.7	33.9	38.4	51.5	36.1	46.2	32.8	36.9	37.3	42.9
	Somewhat agree	%	30.9	38.7	29.8	34.3	25.6	27.9	30.6	31.2	32.7	32.1	28.7
	Somewhat disagree	%	15.5	12.2	19.0	14.3	12.9	17.8	12.1	18.8	17.4	14.8	14.9
	Disagree	%	11.4	10.3	13.0	10.4	7.0	17.0	10.1	12.6	11.8	10.0	12.3
	Unsure	%	2.8	2.0	4.3	2.5	3.1	1.2	1.0	4.6	1.3	5.8	1.3

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

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Authority should be shared between municipal, Indigenous and federal/provincial/territorial governments when it comes to energy infrastructure projects	Total	Unwgt N	1000	100	250	300	200	150	504	496	208	390	402
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Agree	%	34.0	34.5	37.0	34.9	29.2	33.1	25.9	41.8	38.4	30.8	33.7
	Somewhat agree	%	34.0	33.8	38.6	36.2	28.7	29.2	35.5	32.6	35.9	33.5	33.2
	Somewhat disagree	%	15.1	13.6	11.5	14.1	16.8	22.0	16.8	13.5	14.1	17.2	14.0
	Disagree	%	14.6	15.0	9.0	13.3	23.3	14.7	20.1	9.2	9.4	15.7	17.2
	Unsure	%	2.3	3.2	3.9	1.5	1.9	1.1	1.7	2.9	2.2	2.8	1.9

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

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Canada needs to substantially strengthen the capacity for local governments to regulate and shape energy development	Total	Unwgt N	1000	100	250	300	200	150	504	496	208	390	402
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Agree	%	21.5	19.7	23.8	18.4	24.5	21.4	19.5	23.6	26.6	18.8	20.5
	Somewhat agree	%	39.3	48.5	41.9	39.1	34.0	36.5	37.6	40.9	38.7	39.0	40.1
	Somewhat disagree	%	18.7	14.8	16.0	21.0	19.6	20.0	19.5	17.9	16.0	19.4	20.0
	Disagree	%	15.1	12.9	12.1	15.4	17.0	18.4	19.8	10.5	11.7	16.5	16.1
	Unsure	%	5.4	4.1	6.2	6.2	4.9	3.8	3.6	7.0	7.1	6.3	3.3

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

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Canada needs to substantially strengthen the capacity for indigenous governments to regulate and shape energy development	Total	Unwgt N	1000	100	250	300	200	150	504	496	208	390	402
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Agree	%	21.8	18.6	20.4	24.7	17.1	26.9	16.6	26.8	27.7	19.0	20.2
	Somewhat agree	%	27.8	27.7	34.2	27.9	23.2	22.9	23.3	32.0	28.8	25.5	29.0
	Somewhat disagree	%	19.6	21.9	19.2	17.1	22.9	19.6	22.5	16.9	17.8	21.1	19.7
	Disagree	%	26.0	26.5	19.4	26.1	32.3	28.3	33.5	18.9	20.8	28.5	27.5
	Unsure	%	4.7	5.2	6.8	4.3	4.5	2.3	4.1	5.4	4.9	5.9	3.6

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