

Energy and environmental leaders agree or somewhat agree that Canada needs to better manage cumulative project effects on communities; 'final say' on projects crossing multiple communities should rest in the hands of government

Positive Energy Panel – Wave II – Summary
submitted by Nanos to Positive Energy, January 2018



Summary

The majority of participating energy and environmental leaders agree or somewhat agree that Canada needs to better manage the cumulative effects of projects on local and indigenous communities, and that the 'final say' on projects crossing multiple communities should rest in the hands of federal or provincial/territorial governments. Participating energy and environmental leaders agree or somewhat agree that Canada needs to strengthen the capacity for Indigenous governments to shape energy development and that authority should be shared between levels of government, while they have mixed views on whether Canada needs to substantially strengthen the capacity for local governments to regulate and shape energy development. The majority of participating energy and environmental leaders believe Canada is doing a poor or very poor job regarding job developing a shared long-term vision for Canada's energy future and building public confidence in energy decision-making.

Views on project and energy issues

A majority of participating energy and environmental leaders say that Canada is doing a poor or very poor job across the tested activities. More than two in three participating energy and environmental leaders say that Canada is doing a poor or very poor job at developing a shared long-term vision for Canada's energy future and building confidence in energy decision-making.

- **Over two in three participating energy and environmental leaders say that Canada is doing a poor or very poor job building public confidence in energy decision-making** – When asked how good of a job Canada is doing at building public confidence in energy decision-makings, two thirds of the participants say Canada say doing a very poor (27%) or poor (40%) job, while just over two in ten say an average job (23%), and one in ten say a very good (one per cent) or good job (nine per cent).
- **A comfortable majority of participating energy and environmental leaders say Canada is doing a poor or very poor job balancing the concerns of local communities with broader national interests** – Just over two in three participants say that Canada is doing a poor (39%) or very poor (22%) job balancing the concerns of local communities that are affected by a local energy infrastructure project with broader regional, provincial or national interests. Twenty-one per cent of participants say an average job, 18 per cent say Canada is doing a good job. One per cent of participants are unsure.
- **Four in five participating energy and environmental thought leaders say Canada is doing a poor or very poor job developing a shared long-term vision for Canada's energy future** – Over four in five participants say Canada is doing a poor (40%) or very poor (40%) job developing a long-term vision for Canada's energy future, while 12 per cent say it is doing an average job, and just under one in ten say a very good (one per cent) or good (seven per cent) job.

- **Just under three in five participating energy and environmental leaders say that Canada is doing a poor or very poor job providing a clear, predictable and competitive policy and regulatory environment for energy investors** – Over half of participants say that Canada is doing a very poor (24%) or poor job (33%) at providing a clear, predictable and competitive policy and regulatory environment for energy investors. Just over one in four say Canada is doing an average job (26%) while just under one in five say Canada is doing a very good (three per cent) or good (14%).

Solving ‘Who Decides’

A comfortable majority of participating environmental and energy leaders 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 and 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.

- **Nearly nine in ten participating energy and environmental leaders agree or somewhat agree that Canada needs to better manage the cumulative effects of multiple projects** – When asked if they 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, nearly nine in ten participants say they agree (59%) or somewhat agree (27%), while just over one in ten disagree (five per cent) or somewhat disagree (six per cent). Four per cent are unsure.
- **Over two in ten participating energy and environmental leaders mention having to consider cumulative socioeconomic and environmental impacts of multiple projects as the reason for their opinion on managing the effects of multiple projects** – When asked why they held that opinion regarding the need for Canada to better manage the cumulative effects of multiple projects to provide greater clarity for local and Indigenous governments and for investors, the top mention was The top reasons participants cite to defend their opinion about Canada providing greater clarity to local and indigenous governments are that Canada has to better manage socioeconomic and environmental impacts (23%), that national politics lack a clear resource development strategy (16%), and that understanding the interplay between social, economic, and ecological decisions is important an important criteria in energy development (11%).
- **Four in five participating energy and environmental leaders agree or somewhat agree that the ‘final say’ on projects crossing multiple communities should rest in the hands of federal or provincial/territorial governments** – When asked to what extent they agree 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, a comfortable majority of participants say they agree (57%) or somewhat agree (24%), while just under one in five disagree (12%) or somewhat disagree (six per cent). Two per cent are unsure.

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- **Half of participating energy and environmental leaders mention elected government officials as the logical entities to have ‘final say’ and balance interests** – When asked the reason for their opinion regarding the ‘final say’ on projects crossing multiple communities, one in two participants mentioned that somebody has to have the final say and elected government officials are the logical entities to do that and to balance interests, followed by 14 per cent say the regulatory process has to be clear, transparent, and evidence based, 13 per cent who say you need to consult local communities and try to seek consensus. Also mentioned was Indigenous and First Nations should be involved in approving projects (eight per cent), and smaller groups or local communities (NIMBYism) should not have the power to detain a project (six per cent).
 - **Over three in five participating energy and environmental leaders agree or somewhat agree that authority should be shared when it comes to energy infrastructure projects** – When asked for their level of agreement with authority being shared between municipal, Indigenous and federal/provincial/territorial governments when it comes to energy infrastructure projects, a majority of participants say they agree (21%) or somewhat agree (42%), while just over one in three disagree (24%) or somewhat disagree (11%). Two per cent are unsure.
 - **Participants most frequently mention that shared responsibility would encourage greater consultation, support and increased accountability for decisions when asked for the reason for their opinion on shared authority for energy infrastructure projects** – When asked the reason for the opinion regarding their level of agreement with authority being shared between municipal, Indigenous and federal/provincial/territorial governments when it comes to energy infrastructure projects, three in ten participating energy and environmental leaders mention that shared responsibility would encourage greater consultation, support and increased accountability for decisions (30%), followed by agree with shared authority but one group should not be allowed to stop a project if it's for the greater good (27%). Also mentioned was having multiple governments responsible for energy infrastructure projects leads to very complex decision-making (18%), we need a single, objective and scientific body to make a final decision, it depends on whether a project is within a municipality, within a province or crosses provincial boundary, and rules, jurisdictions and decision-making process must be clear with timelines (seven per cent each).
 - **Participating energy and environmental leaders have mixed views on whether Canada needs to substantially strengthen the capacity for local governments to regulate and shape energy development** – When asked for their level of agreement with the idea that - Canada needs to substantially strengthen the capacity for local governments to regulate and shape energy development, participants have mixed opinions, with half who say they agree (21%) or somewhat agree (29%) while just under half disagree (24%) or somewhat disagree (24%). Two per cent are unsure.

- **Two in three participating energy and environmental leaders agree or somewhat agree that Canada needs to substantially strengthen the capacity for Indigenous governments to regulate and shape energy development – A comfortable majority of participants say they agree (31%) or somewhat agree (35%) that Canada needs to substantially strengthen the capacity for indigenous governments to regulate and shape energy development, while one in three say they disagree (18%) or somewhat disagree (16%).**

Thought leaders in energy and environment

Participating environmental and energy leaders mention a range of top thought leaders for environmental and energy issues and policy in Canada, with Mike Cleveland as the most frequent mention for energy issues and Catherine McKenna as the most frequent mention for environmental issues.

- **Participating environmental and energy leaders most frequently name Mike Cleveland as a top thought leader for energy issues and policy in Canada** – When asked to name the top five thought leaders when it comes to energy issues and policy in Canada, participants most frequently mentioned Mike Cleveland (15%), followed by the oil and gas industry (14%), Andrew Leach (14%), and Monica Gattinger (14%). Also mentioned was the Federal government/Prime Minister (12%), Jim Carr (12%), Steve Williams (12%), Peter Tertzakian (12%), Justin Trudeau (10%), and Catherine McKenna (10%).
- **Participating environmental and energy leaders most frequently name Catherine McKenna as a top thought leader for environmental issues and policy in Canada** – When asked to name the top five thought leaders when it comes to environmental issues and policy in Canada, participants most frequently mentioned Catherine McKenna (26%), followed by David Suzuki (17%), and NGOs (17%). Also mentioned was Chris Ragan (13%), Special Interests (13%), Provincial governments (11%), Elizabeth May (11%), and Stewart Elgie (11%).

These observations are based on an online outreach of 88 environmental and energy leaders between September 26th and November 27th, 2017.

Readers should note that the research is representative of the participants and should not be projected to any population, elite or general. No margin of error applies to this research

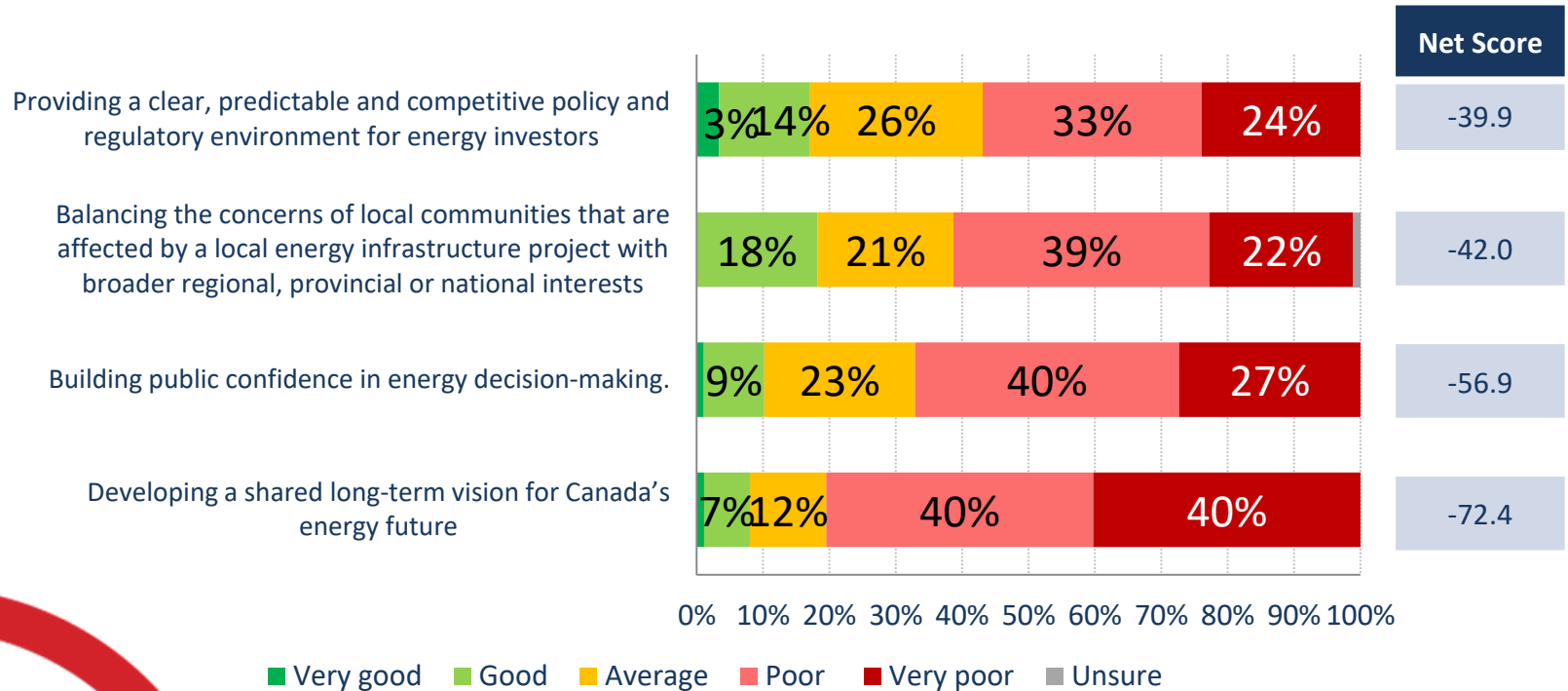
The research was commissioned by the University of Ottawa and independently administered by Nanos Research from research design through to administration and analysis.

1.0 Views on project and energy issues



Opinion on Canada's job

Source: Nanos Research, online survey of 88 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.



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

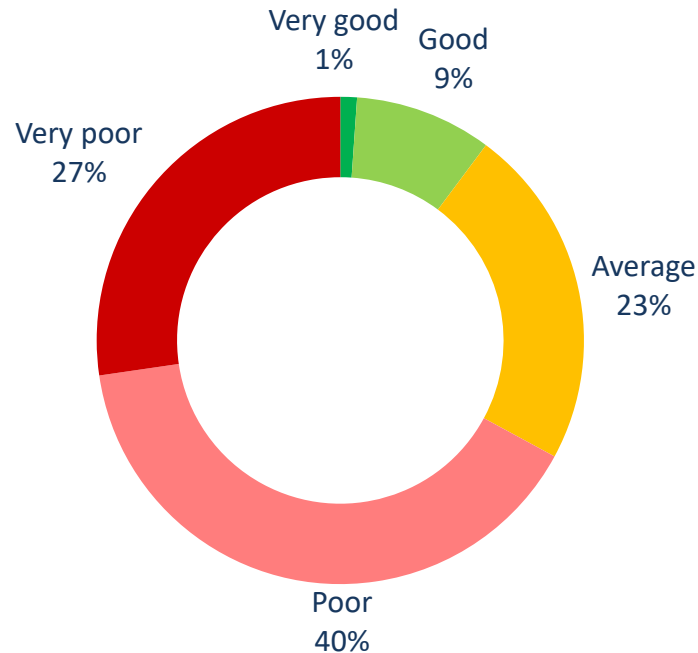
QUESTION – Do you think Canada in general does a very good, good, average, poor or very poor job at the following [ROTATE]:

Building public confidence in energy decision-making

Source: Nanos Research, online survey of 88 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.

Net Score

-56.9



***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]:

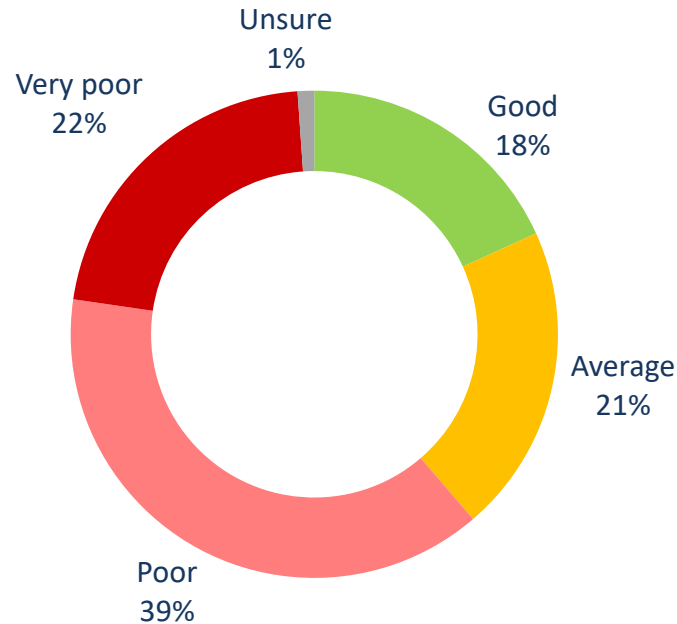
Building public confidence in energy decision-making.

Balancing concerns of communities affected by energy projects

Source: Nanos Research, online survey of 88 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.

Net Score

-42.0



***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]:

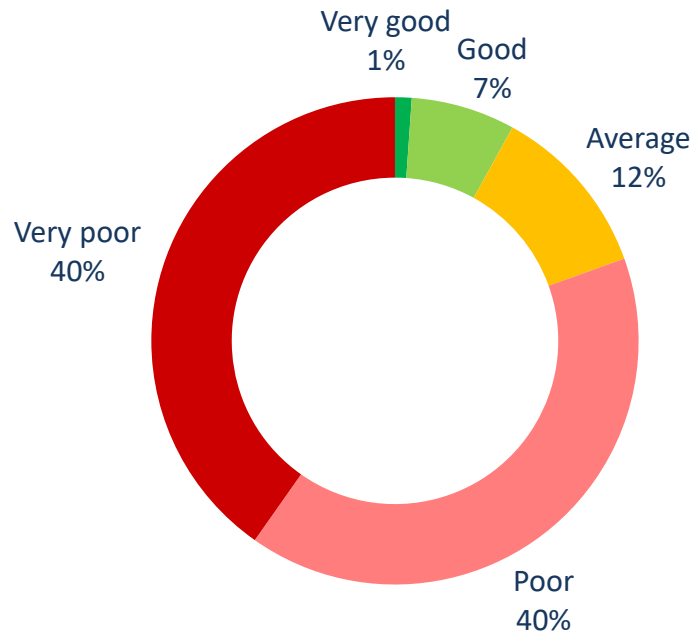
Balancing the concerns of local communities that are affected by a local energy infrastructure project.

Long-term vision for Canada's energy future

Source: Nanos Research, online survey of 87 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.

Net Score

-72.4



***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]:

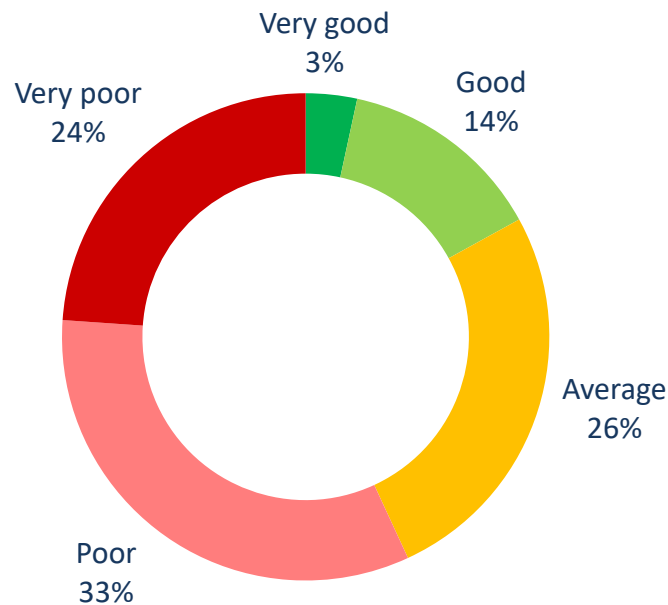
Developing a shared long-term vision for Canada's energy future.

Policy and regulatory environment for energy investors

Source: Nanos Research, online survey of 88 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.

Net Score

-39.9



***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]:

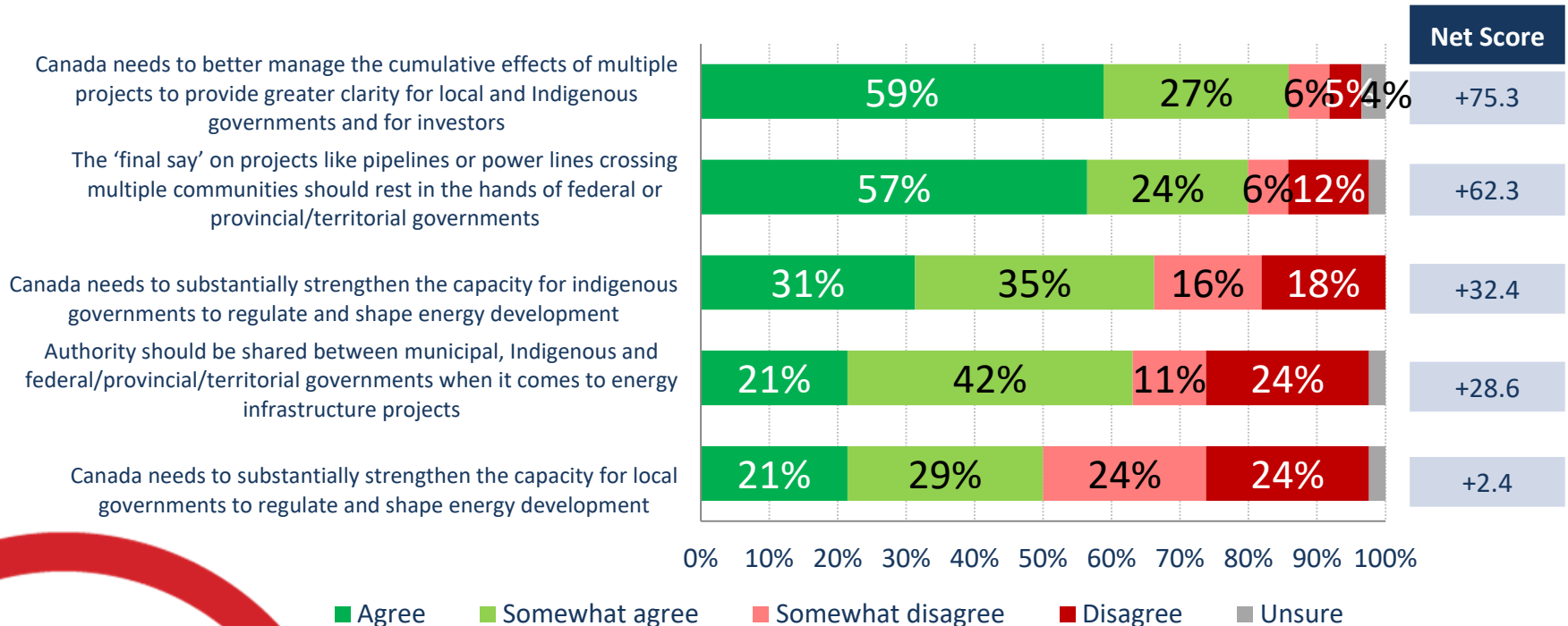
Providing a clear, predictable and competitive policy and regulatory environment for energy investors.

2.0 Solving ‘Who Decides’



Agreement with recommendations to resolve “Who Decides” challenge

Source: Nanos Research, online survey of 85 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.



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

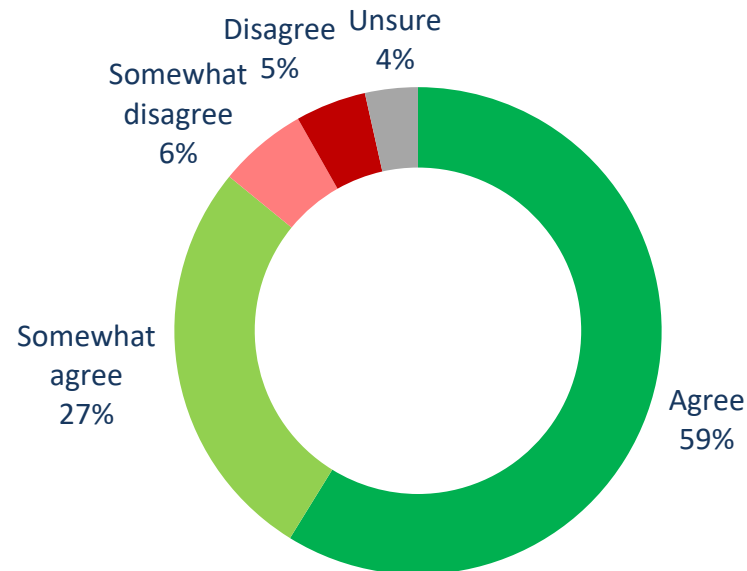
QUESTION – Some say Canada has struggled with ‘Who Decides?’ when it comes to energy development: municipalities and Indigenous governments, or provincial and federal governments. I’m going to read a list of potential recommendations to resolve this challenge. Do you agree, somewhat agree, somewhat disagree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

Agreement with Canada needing to better manage cumulative effects of projects

Source: Nanos Research, online survey of 85 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.

Net Score

+75.3



***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?

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

Reason Canada needs to better manage effects of multiple projects

Source: Nanos Research, online survey of 57 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.

	Agree (n=34)	Somewhat agree (n=14)	Somewhat disagree (n=3)	Disagree (n=3)	Unsure (n=3)	Total (n=57)
Have to consider and better manage the cumulative socioeconomic and environmental impacts of multiple projects	29.4%	21.4%	-	-	-	22.8%
National politics lack clear direction, strategies and commitment to lead/slow decision-making	17.6%	21.4%	-	-	-	15.8%
Understanding the interplay between social, economic and ecological decisions is important.	11.8%	14.3%	-	-	-	10.5%
Value of project should benefit broader communities/can't decide with political lens	5.9%	7.1%	66.7%	-	-	8.8%
No project should be looked at in isolation/collectively assess projects	11.8%	7.1%	-	-	-	8.8%
Different stakeholder communities have opposite positions and issues/have to compromise	8.8%	7.1%	-	-	-	7.0%
Have to engage different groups and communities to decide fate of projects/not just one group	2.9%	-	33.3%	-	33.3%	5.3%
Because current projects have failed	5.9%	-	-	-	-	3.5%
Good idea, but it is difficult to accurately assess all cumulative effects	2.9%	7.1%	-	-	-	3.5%
It is not the role of the federal jurisdiction to better manage cumulative effects	-	-	-	66.7%	0.0%	3.5%
There should always be efforts to continue improving management/continuous process	-	7.1%	-	-	-	1.8%
Long-term risks and consequences of projects are unclear	2.9%	-	-	-	-	1.8%
Other	-	-	-	33.3%	33.3%	3.5%
Unsure	-	7.1%	-	-	33.3%	3.5%

QUESTION – Why do you have that opinion? [OPEN-ENDED]

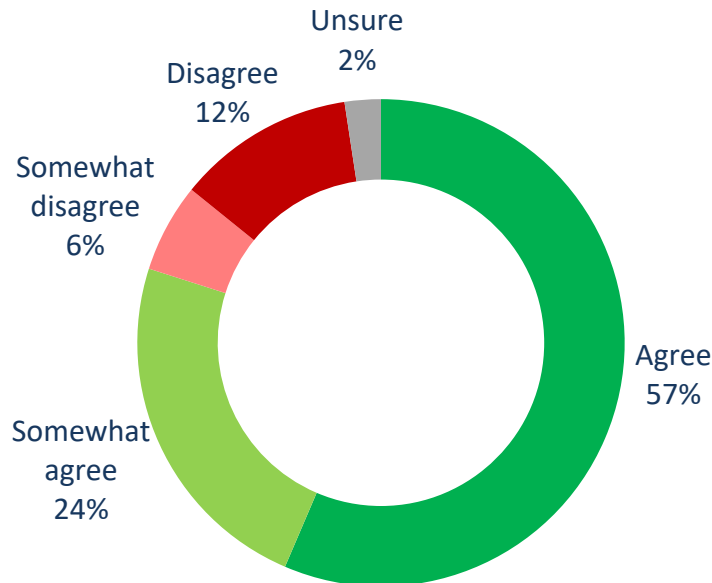
Confidential

Agreement with governments having final say on projects crossing multiple communities

Source: Nanos Research, online survey of 85 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.

Net Score

+62.3



***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.

Reason on governments having final say on projects crossing multiple communities

Source: Nanos Research, online survey of 64 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.

	Agree (n=34)	Somewhat agree (n=13)	Somewhat disagree (n=5)	Disagree (n=10)	Unsure (n=2)	Total (n=64)
Somebody has to have the final say and elected governments are the logical entities to do that and to balance interests	76.5%	23.1%	20.0%	20.0%	-	50.0%
The regulatory process has to be clear, transparent and evidence based	8.8%	23.1%	-	10.0%	100.0%	14.1%
Need to consult local communities and try to seek consensus	2.9%	15.4%	20.0%	40.0%	-	12.5%
Indigenous and First Nations should be involved in approving projects	-	7.7%	40.0%	20.0%	-	7.8%
Smaller groups or local communities (NIMBYism) should not have the power to detain a project	8.8%	7.7%	-	-	-	6.3%
Experts within the regulatory system should decide, not for uninformed politicians with no industry experiences	-	7.7%	-	10.0%	-	3.1%
For interprovincial projects, the provincial government should have the final say	2.9%	7.7%	-	-	-	3.1%
Seems like certain decisions are driven by monetary interests	-	0.0%	20.0%	-	-	1.6%
There should be a national energy strategy in place that is based on an agreed to set of principles to serve as a roadmap	-	7.7%	-	-	-	1.6%

QUESTION – Why do you have that opinion? [OPEN-ENDED]

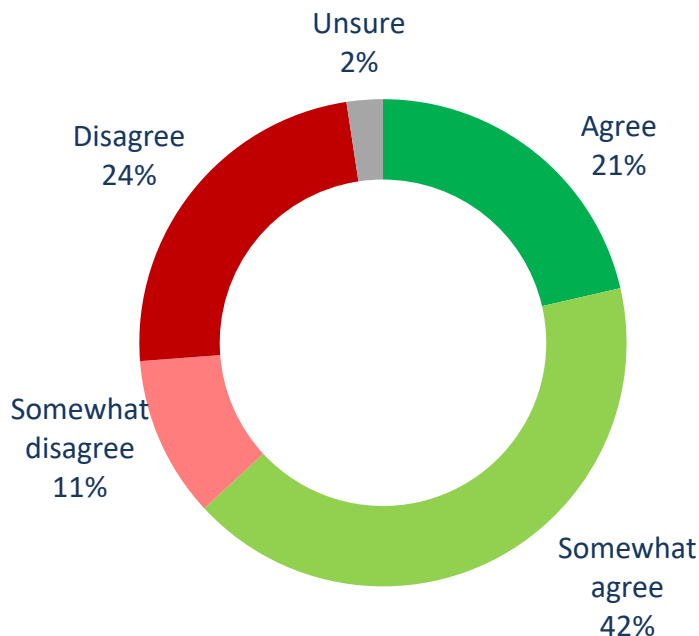
Confidential

Agreement with shared authority between governments regarding energy infrastructure projects

Source: Nanos Research, Elite online outreach to 84 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.

Net Score

+28.6



***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?

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

Reason for opinion on shared authority between governments regarding energy infrastructure projects

Source: Nanos Research, Elite online outreach to 60 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.

	Agree (n=14)	Somewhat agree (n=24)	Somewhat disagree (n=6)	Disagree (n=14)	Unsure (n=2)	Total (n=60)
Shared responsibility would encourage greater consultation, support and increased accountability for decisions	57.1%	29.2%	-	14.3%	50.0%	30.0%
Agree with shared authority but one group should not be allowed to stop a project if it's for the greater good	7.1%	29.2%	50.0%	28.6%	50.0%	26.7%
Having multiple governments responsible for energy infrastructure projects leads to very complex decision-making	14.3%	8.3%	33.3%	35.7%	-	18.3%
We need a single, objective and scientific body to make a final decision.	-	4.2%	16.7%	14.3%	-	6.7%
Depends on whether a project is within a municipality, within a province or crosses provincial boundary	7.1%	8.3%	-	7.1%	-	6.7%
Rules, jurisdictions and decision-making process must be clear with timelines	7.1%	12.5%	-	-	-	6.7%
Indigenous treaty or aboriginal rights must be respected	-	8.3%	-	-	-	3.3%
Unsure	7.1%	-	-	-	-	1.7%

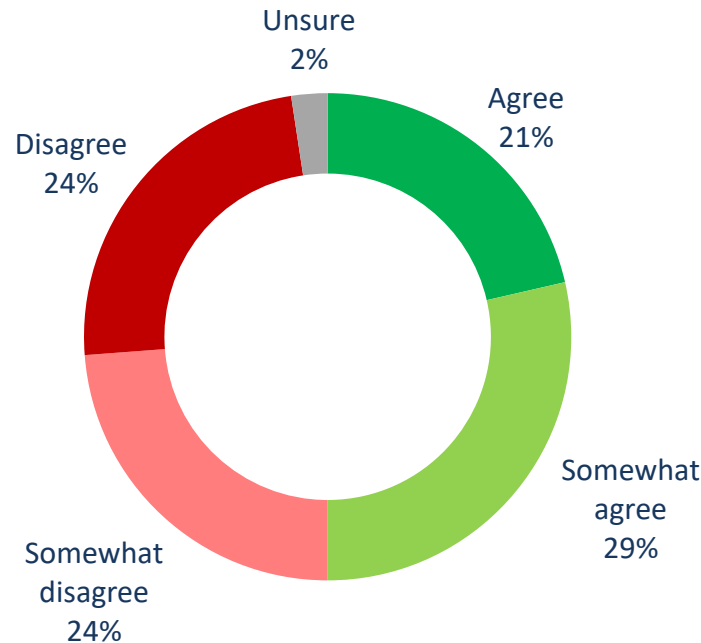
QUESTION – Why do you have that opinion? [OPEN-ENDED]

Agreement with strengthening capacity for local governments to regulate energy development

Source: Nanos Research, Elite online outreach to 84 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.

Net Score

+2.4



***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?

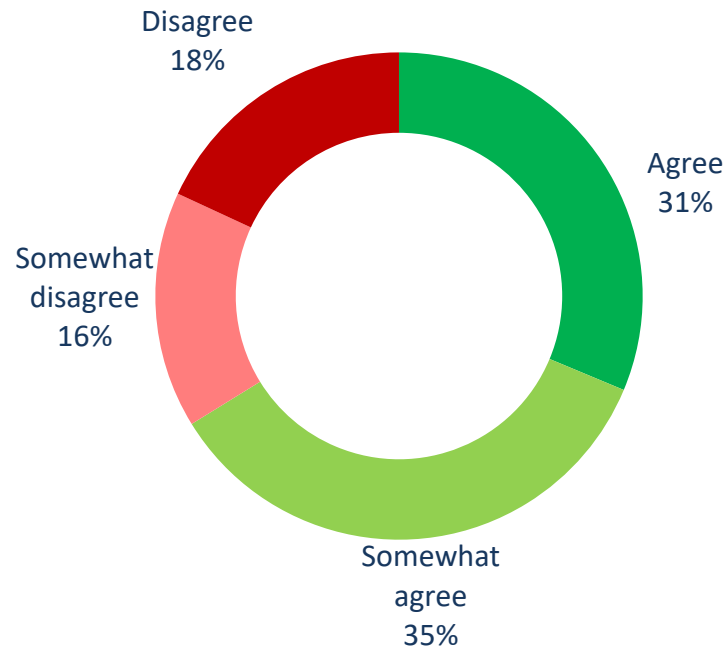
Canada needs to substantially strengthen the capacity for local governments to regulate and shape energy development.

Agreement with strengthening capacity for indigenous governments to regulate energy development

Source: Nanos Research, Elite online outreach to 83 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.

Net Score

+32.4



*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?

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



Top thought leaders in energy issues

Source: Nanos Research, Elite online outreach to 88 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.



Government/Energy Regulator

Federal government/Prime Minister

Provincial government

British Columbia Ministry of Energy, Mines and
Petroleum Resources
National Energy Board
Provincial regulators



First Nation Stakeholder

Indigenous groups/ governments

Joe Dionne

Caleb Behn

Chris Henderson

Isadore Day

Perry Bellegard



Ministers/Politicians/Municipal Leaders

Jim Carr

Tim McMillan

Politicians

Rachel Notley

Elizabeth May

Justin Trudeau

Catherine McKenna

Brad Wall

Jim Prentice

Jody Wilson Raybould

John Williamson

Kathleen Wynne

Marlo Raynolds

Municipal Leadership



Environmental Association/NGO

David Suzuki

Non-governmental organizations

Pollution probe

Judy Fairbairn

Tom Adams

Tzeporah Berman



Media

Media/Social media

Debra Yedlin

Rex Murphy

QUESTION – Who are the top five thought leaders when it comes to energy issues and policy in Canada?
[OPEN-ENDED]

Top thought leaders in energy issues (cont.)

Source: Nanos Research, Elite online outreach to 88 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.



Private Sector/Energy Association

Mike Cleveland Oil and gas industry Steve Williams – CEO of Suncor Peter Tertzakian Pembina Institute Dave Collyer Tom Rand Dawn Farrel Canadian Association of Petroleum Producers Ian Anderson – Kinder Morgan Al Monaco Andrew Wheeler Anouk Kendall Barry Perry Brenda Kenny	Byng Geraud Charlie Fischer Chris Benedetti Chris Bloomer Gwyn Morgan Jim Burpee JP Pinard Lorne Trottier Lorraine Mitchelmore MAC Mark Salkeld Michael Binnion Pierre Alvarez QUEST Ron Dizy Sue Riddell Rose
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Academic

Andrew Leach Monica Gattinger Mark Jaccard Academics University of Ottawa Positive Energy Program Jack Mintz Jatin Nathwani Clean Energy Canada Guy Holburn Chris Ragan Canada West Foundation	David Keith Fraser Institute George Hoberg Gord Lambert Graham Campbell Michael Moore (Economist) Naomi Klein Philip Cross Ross McKittrick University of Calgary School of Public Policy
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No category

Consumers
Population (i.e., general public)
Special Interests

QUESTION – Who are the top five thought leaders when it comes to energy issues and policy in Canada?
[OPEN-ENDED]

Top thought leaders in environmental issues

Source: Nanos Research, Elite online outreach to 88 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.



Government
Provincial government
Supreme Courts
Scott Vaughan
Provincial Deputy Ministers
Government (general)
CEN



First Nation Stakeholder
Derek Fox
Indigenous groups/ governments
Marilyn Flett



Ministers/Politicians/Municipal Leaders

Catherine McKenna
Elizabeth May
Federal government/Prime Minister
Shannon Phillips
Brad Wall
Politicians
Marlo Reynolds
Denis Coderre
Gregor Robertson
Jim Carr
Justin Trudeau
Stephen Lucas
Will Amos



Environmental Association/NGO
Non-governmental organizations
David Suzuki
Pollution probe
Tzeporah Berman
West Coast Environment Law
David Runnals
Canadian Parks and Wilderness Society
Steven Guilbeault (Equiterre)

QUESTION – Who are the top five thought leaders when it comes to environmental issues and policy in Canada? [OPEN-ENDED]

Top thought leaders in environmental issues (cont.)

Source: Nanos Research, Elite online outreach to 88 environmental and energy leaders in Canada, from September 26th to November 27th, 2017. No margin of error applies to this research.



Media

Andrew Nikoforuk
Media
Mike de Souza



Private Sector/Energy Association

Oil and gas industry
Elyse Allen
Derek Nighbor
Lisa DeMarco
Denise Mullen
Mark Cameron
QUEST
Richard Garneau
Robyn Gray
Stewart Muir



Academic

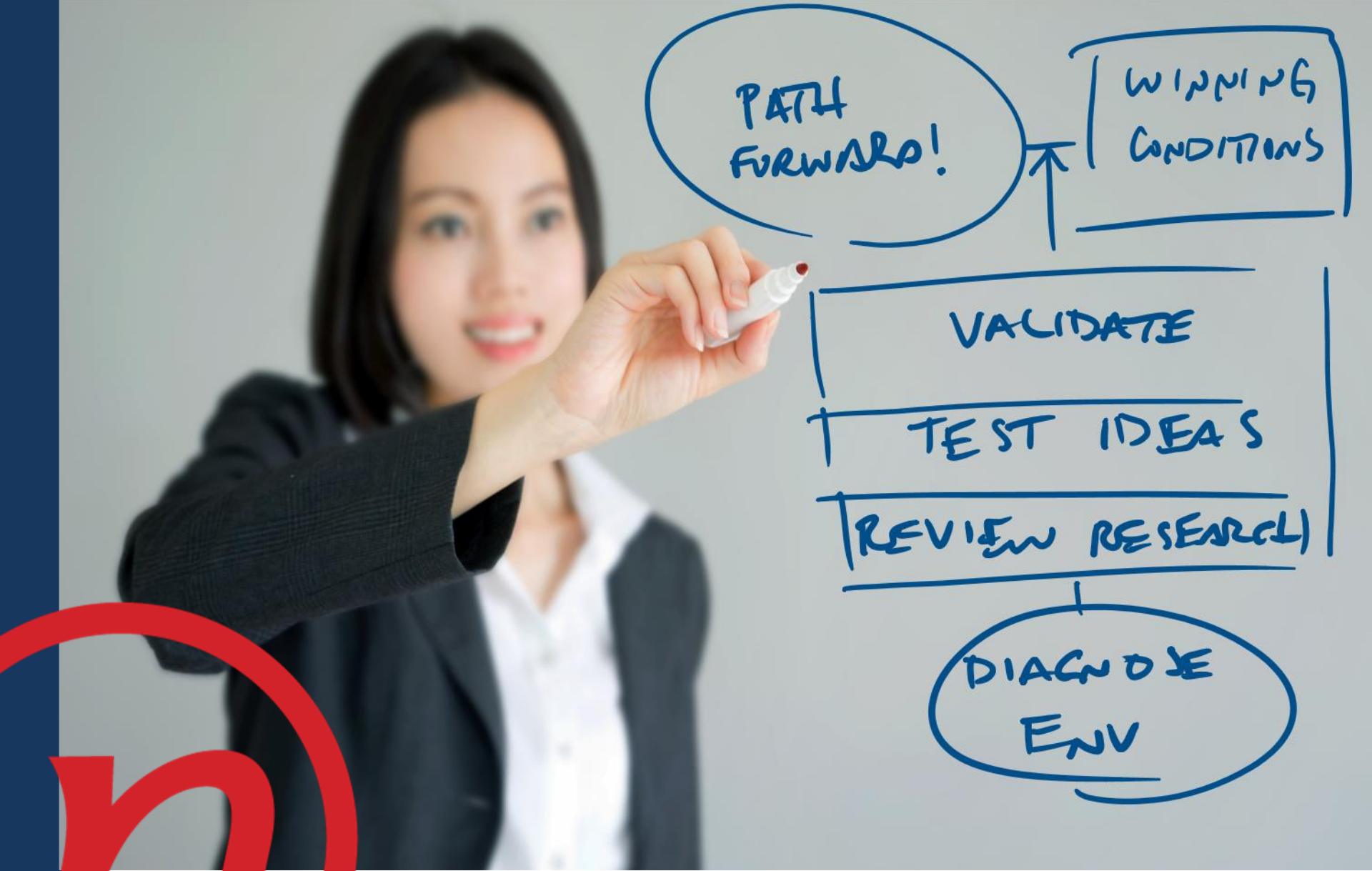
Chris Ragan
Stewart Elgie
Mark Jaccard
Merran Smith
Ken Ogilvie
Naomi Klein
Pembina Institute
Fraser Institute
Academics
Andrew Leach
Bruce Lourie
MRU Institute for Environmental Sustainability
Rob de Loe
Ross McKittrick



No category

Special Interests
The public

QUESTION – Who are the top five thought leaders when it comes to environmental issues and policy in Canada? [OPEN-ENDED]



Methodology

Methodology

Nanos was retained to build a panel of energy and environmental leaders across Canada. The list of potential panel participants was provided by the University of Ottawa to Nanos. The identity and opinions of individual panelists remained confidential and managed by Nanos in accordance with the standards of the Marketing Research and Intelligence Association of which Nanos is a member.

Leaders were initially invited by means of a communication from the Director of the Institute for Science, Society and Policy followed by an invitation by the President of Nanos Research. All participants receive a summary of the key findings of the opinion research in order to advance environmental and energy dialogue.

The observations are based on an online outreach to 88 environmental and energy leaders between September 26th and November 27th, 2017. For the distribution of panel members, please see next page. Readers should note that the research is representative of the participants and should not be projected to any population, elite or general. No margin of error applies to this research

The research was commissioned by the University of Ottawa and independently administered by Nanos Research from research design through to administration and analysis.

Methodology – panel distribution

Category	Frequency
Public sector	32
Private sector	26
Academic	21
ENGO	6
Indigenous	2
Media	1
Total	88

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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info@nanosresearch.com

Technical Note

Element	Description	Element	Description
Organization who commissioned the research	Positive Energy Project, University of Ottawa	Weighting of Data	Not applicable.
Final Sample Size	88 elite environment and energy stakeholders.		
Margin of Error	No margin of error applies to this research.	Stratification	Not applicable.
Mode of Survey	Elite online outreach		
Sampling Method Base	List provided by the University of Ottawa's Positive Energy initiative.	Estimated Response Rate	Nine percent of those contacted participated in the research.
Demographics (Captured)	Select group of environment and energy leaders.	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Fieldwork/Validation	Elite outreach.	Question Content	All questions asked are contained in the report.
Number of Calls	Participants were not called.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Time of Calls	Participants were not called.	Survey Company	Nanos Research
Field Dates	September 26 th to November 27 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 outreach was conducted in both English and French.		



Tabulations

Confidential



2017-1059 – Positive Energy Panel – Wave 2 Participant Categories – STAT SHEET

Overcode					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Academic	21	23.9	23.9	23.9
	ENGO	6	6.8	6.8	30.7
	Indigenous	2	2.3	2.3	33.0
	Media	1	1.1	1.1	34.1
	Private sector	26	29.5	29.5	63.6
	Public sector	32	36.4	36.4	100.0
	Total	88	100.0	100.0	

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2017-1059 – Positive Energy Panel – Wave 2 Participant Categories – STAT SHEET

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

Question 1 - Building public confidence in energy decision-making * Overcode Crosstabulation

			Overcode						
			Academic	ENGO	Indigenous	Media	Private sector	Public sector	Total
Question 1 - Building public confidence in energy decision-making	Very good	Count	0	0	1	0	0	0	1
		% within Overcode	0.0%	0.0%	50.0%	0.0%	0.0%	0.0%	1.1%
	Good	Count	0	0	0	0	3	5	8
		% within Overcode	0.0%	0.0%	0.0%	0.0%	11.5%	15.6%	9.1%
	Average	Count	7	1	0	1	3	8	20
		% within Overcode	33.3%	16.7%	0.0%	100.0%	11.5%	25.0%	22.7%
	Poor	Count	9	4	1	0	11	10	35
		% within Overcode	42.9%	66.7%	50.0%	0.0%	42.3%	31.3%	39.8%
	Very poor	Count	5	1	0	0	9	9	24
		% within Overcode	23.8%	16.7%	0.0%	0.0%	34.6%	28.1%	27.3%
Total	Count	21	6	2	1	26	32	88	
	% within Overcode	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

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

Question 2 - Balancing the concerns of local communities that are affected by a local energy infrastructure project with broader regional, provincial or national interests * Overcode Crosstabulation

			Overcode						
			Academic	ENGO	Indigenous	Media	Private sector	Public sector	Total
Question 2 - Balancing the concerns of local communities that are affected by a local energy infrastructure project with broader regional, provincial or national interests	Good	Count	3	0	1	0	6	6	16
		% within Overcode	14.3%	0.0%	50.0%	0.0%	23.1%	18.8%	18.2%
	Average	Count	5	3	0	1	3	6	18
		% within Overcode	23.8%	50.0%	0.0%	100.0%	11.5%	18.8%	20.5%
	Poor	Count	9	2	1	0	10	12	34
		% within Overcode	42.9%	33.3%	50.0%	0.0%	38.5%	37.5%	38.6%
	Very poor	Count	4	1	0	0	7	7	19
		% within Overcode	19.0%	16.7%	0.0%	0.0%	26.9%	21.9%	21.6%
	Unsure	Count	0	0	0	0	0	1	1
		% within Overcode	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	1.1%
Total	Count	21	6	2	1	26	32	88	
	% within Overcode	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

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

Question 3 - Developing a shared long-term vision for Canada's energy future * Overcode Crosstabulation

			Overcode						
			Academic	ENGO	Indigenous	Media	Private sector	Public sector	Total
Question 3 - Developing a shared long-term vision for Canada's energy future	Very good	Count	0	0	0	0	0	1	1
		% within Overcode	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	1.1%
	Good	Count	0	0	1	0	1	4	6
		% within Overcode	0.0%	0.0%	50.0%	0.0%	3.8%	12.5%	6.9%
	Average	Count	3	1	0	0	2	4	10
		% within Overcode	14.3%	20.0%	0.0%	0.0%	7.7%	12.5%	11.5%
	Poor	Count	13	2	1	1	11	7	35
		% within Overcode	61.9%	40.0%	50.0%	100.0%	42.3%	21.9%	40.2%
	Very poor	Count	5	2	0	0	12	16	35
		% within Overcode	23.8%	40.0%	0.0%	0.0%	46.2%	50.0%	40.2%
Total	Count	21	5	2	1	26	32	87	
	% within Overcode	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

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

Question 4 - Providing a clear, predictable and competitive policy and regulatory environment for energy investors * Overcode Crosstabulation

			Overcode						
			Academic	ENGO	Indigenous	Media	Private sector	Public sector	Total
Question 4 - Providing a clear, predictable and competitive policy and regulatory environment for energy investors	Very good	Count	0	0	1	0	0	2	3
		% within Overcode	0.0%	0.0%	50.0%	0.0%	0.0%	6.3%	3.4%
	Good	Count	4	1	0	0	3	4	12
		% within Overcode	19.0%	16.7%	0.0%	0.0%	11.5%	12.5%	13.6%
	Average	Count	6	2	0	0	4	11	23
		% within Overcode	28.6%	33.3%	0.0%	0.0%	15.4%	34.4%	26.1%
	Poor	Count	9	3	1	1	8	7	29
		% within Overcode	42.9%	50.0%	50.0%	100.0%	30.8%	21.9%	33.0%
	Very poor	Count	2	0	0	0	11	8	21
		% within Overcode	9.5%	0.0%	0.0%	0.0%	42.3%	25.0%	23.9%
Total	Count		21	6	2	1	26	32	88
	% within Overcode		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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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?

Question 5 - Canada needs to better manage the cumulative effects of multiple projects to provide greater clarity for local and Indigenous governments and for investors * Overcode Crosstabulation

			Overcode						
			Academic	ENGO	Indigenous	Media	Private sector	Public sector	Total
Question 5 - Canada needs to better manage the cumulative effects of multiple projects to provide greater clarity for local and Indigenous governments and for investors	Agree	Count	11	5	2	1	16	15	50
		% within Overcode	55.0%	83.3%	100.0%	100.0%	61.5%	50.0%	58.8%
	Somewhat agree	Count	7	1	0	0	5	10	23
		% within Overcode	35.0%	16.7%	0.0%	0.0%	19.2%	33.3%	27.1%
	Somewhat disagree	Count	0	0	0	0	1	4	5
		% within Overcode	0.0%	0.0%	0.0%	0.0%	3.8%	13.3%	5.9%
	Disagree	Count	1	0	0	0	3	0	4
		% within Overcode	5.0%	0.0%	0.0%	0.0%	11.5%	0.0%	4.7%
	Unsure	Count	1	0	0	0	1	1	3
		% within Overcode	5.0%	0.0%	0.0%	0.0%	3.8%	3.3%	3.5%
Total	Count	20	6	2	1	26	30	85	
	% within Overcode	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

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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?

Question 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. * Overcode Crosstabulation

			Overcode						
			Academic	ENGO	Indigenous	Media	Private sector	Public sector	Total
Question 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.	Agree	Count	9	2	0	1	18	18	48
		% within Overcode	45.0%	33.3%	0.0%	100.0%	69.2%	60.0%	56.5%
	Somewhat agree	Count	6	1	1	0	3	9	20
		% within Overcode	30.0%	16.7%	50.0%	0.0%	11.5%	30.0%	23.5%
	Somewhat disagree	Count	2	1	0	0	0	2	5
		% within Overcode	10.0%	16.7%	0.0%	0.0%	0.0%	6.7%	5.9%
	Disagree	Count	1	2	1	0	5	1	10
		% within Overcode	5.0%	33.3%	50.0%	0.0%	19.2%	3.3%	11.8%
	Unsure	Count	2	0	0	0	0	0	2
		% within Overcode	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%
Total	Count	20	6	2	1	26	30	85	
	% within Overcode	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

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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?

Question 9 - Authority should be shared between municipal, Indigenous and federal/provincial/territorial governments when it comes to energy infrastructure projects. * Overcode Crosstabulation

			Overcode						Total
			Academic	ENGO	Indigenous	Media	Private sector	Public sector	
Question 9 - Authority should be shared between municipal, Indigenous and federal/provincial/territorial governments when it comes to energy infrastructure projects.	Agree	Count	2	4	1	0	3	8	18
		% within Overcode	10.0%	66.7%	50.0%	0.0%	11.5%	27.6%	21.4%
	Somewhat agree	Count	12	1	1	1	9	11	35
		% within Overcode	60.0%	16.7%	50.0%	100.0%	34.6%	37.9%	41.7%
	Somewhat disagree	Count	2	1	0	0	3	3	9
		% within Overcode	10.0%	16.7%	0.0%	0.0%	11.5%	10.3%	10.7%
	Disagree	Count	3	0	0	0	11	6	20
		% within Overcode	15.0%	0.0%	0.0%	0.0%	42.3%	20.7%	23.8%
	Unsure	Count	1	0	0	0	0	1	2
		% within Overcode	5.0%	0.0%	0.0%	0.0%	0.0%	3.4%	2.4%
Total	Count		20	6	2	1	26	29	84
	% within Overcode		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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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?

Question 11 - Canada needs to substantially strengthen the capacity for local governments to regulate and shape energy development. * Overcode Crosstabulation

			Overcode						
			Academic	ENGO	Indigenous	Media	Private sector	Public sector	Total
Question 11 - Canada needs to substantially strengthen the capacity for local governments to regulate and shape energy development.	Agree	Count	3	3	1	0	5	6	18
		% within Overcode	15.0%	50.0%	50.0%	0.0%	19.2%	20.7%	21.4%
	Somewhat agree	Count	5	3	1	1	5	9	24
		% within Overcode	25.0%	50.0%	50.0%	100.0%	19.2%	31.0%	28.6%
	Somewhat disagree	Count	6	0	0	0	8	6	20
		% within Overcode	30.0%	0.0%	0.0%	0.0%	30.8%	20.7%	23.8%
	Disagree	Count	5	0	0	0	8	7	20
		% within Overcode	25.0%	0.0%	0.0%	0.0%	30.8%	24.1%	23.8%
	Unsure	Count	1	0	0	0	0	1	2
		% within Overcode	5.0%	0.0%	0.0%	0.0%	0.0%	3.4%	2.4%
Total	Count	20	6	2	1	26	29	84	
	% within Overcode	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

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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?

Question 12 - Canada needs to substantially strengthen the capacity for indigenous governments to regulate and shape energy development. * Overcode Crosstabulation

			Overcode						Total
			Academic	ENGO	Indigenous	Media	Private sector	Public sector	
Question 12 - Canada needs to substantially strengthen the capacity for indigenous governments to regulate and shape energy development.	Agree	Count	6	4	1	1	5	9	26
		% within Overcode	30.0%	80.0%	50.0%	100.0%	19.2%	31.0%	31.3%
	Somewhat agree	Count	10	1	1	0	8	9	29
		% within Overcode	50.0%	20.0%	50.0%	0.0%	30.8%	31.0%	34.9%
	Somewhat disagree	Count	1	0	0	0	6	6	13
		% within Overcode	5.0%	0.0%	0.0%	0.0%	23.1%	20.7%	15.7%
	Disagree	Count	3	0	0	0	7	5	15
		% within Overcode	15.0%	0.0%	0.0%	0.0%	26.9%	17.2%	18.1%
	Total	Count	20	5	2	1	26	29	83
		% within Overcode	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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Question 13 -Who are the top five thought leaders when it comes to energy issues and policy in Canada? [OPEN-ENDED]*Overcode Crosstabulation

			Overcode						Total
			Academic	ENGO	Indigenous	Media	Private sector	Public sector	
Question 13 -Who are the top five thought leaders when it comes to energy issues and policy in Canada? [OPEN-ENDED] ^a	Mike Cleveland	Count	1	0	0	0	5	2	8
		% within new_ovr	2.5%	0.0%	0.0%	0.0%	7.5%	3.0%	
	Government (general)	Count	1	0	0	0	0	0	1
		% within new_ovr	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
	Al Monaco	Count	0	0	0	0	1	0	1
		% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
	David Suzuki	Count	0	0	0	0	1	2	3
		% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	3.0%	
	Rex Murphy	Count	0	0	0	0	1	0	1
		% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
	Jim Carr	Count	0	0	0	0	4	2	6
		% within new_ovr	0.0%	0.0%	0.0%	0.0%	6.0%	3.0%	
	Academics	Count	2	0	0	0	0	1	3
		% within new_ovr	5.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
	Oil and gas industry	Count	6	0	1	0	0	0	7
		% within new_ovr	15.0%	0.0%	10.0%	0.0%	0.0%	0.0%	
	The public	Count	1	0	0	0	0	0	1
		% within new_ovr	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
	Chris Benedetti	Count	0	0	0	0	1	0	1
		% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
	Jim Burpee	Count	0	0	0	0	1	0	1
		% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
	Jatin Nathwani	Count	0	0	0	0	2	0	2
		% within new_ovr							

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Question 13 -Who are the top five thought leaders when it comes to energy issues and policy in Canada? [OPEN-ENDED]*Overcode Crosstabulation

		Overcode						Total
		Academic	ENGO	Indigenous	Media	Private sector	Public sector	
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	
Ron Dizy	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Media	Count	1	2	0	0	0	0	3
	% within new_ovr	2.5%	14.3%	0.0%	0.0%	0.0%	0.0%	
Business interests	Count	0	1	0	0	0	0	1
	% within new_ovr	0.0%	7.1%	0.0%	0.0%	0.0%	0.0%	
Non-governmental organizations	Count	2	1	0	0	0	0	3
	% within new_ovr	5.0%	7.1%	0.0%	0.0%	0.0%	0.0%	
Politicians	Count	1	1	0	0	0	1	3
	% within new_ovr	2.5%	7.1%	0.0%	0.0%	0.0%	1.5%	
None	Count	0	0	0	0	0	3	3
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%	
Other	Count	2	0	0	0	1	7	10
	% within new_ovr	5.0%	0.0%	0.0%	0.0%	1.5%	10.6%	
University of Ottawa Positive Energy Program	Count	0	0	0	0	2	1	3
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	3.0%	1.5%	
British Columbia Ministry of Energy, Mines and Petroleum Resources	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Fraser Institute	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Clean Energy Canada	Count	0	2	0	0	0	0	2
	% within new_ovr	0.0%	14.3%	0.0%	0.0%	0.0%	0.0%	

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Question 13 -Who are the top five thought leaders when it comes to energy issues and policy in Canada? [OPEN-ENDED]*Overcode Crosstabulation

		Overcode						Total
		Academic	ENGO	Indigenous	Media	Private sector	Public sector	
Andrew Leach	Count	3	2	0	1	1	0	7
	% within new_ovr	7.5%	14.3%	0.0%	25.0%	1.5%	0.0%	
Mark Jaccard	Count	1	1	0	0	1	1	4
	% within new_ovr	2.5%	7.1%	0.0%	0.0%	1.5%	1.5%	
Tom Rand	Count	0	1	0	0	1	0	2
	% within new_ovr	0.0%	7.1%	0.0%	0.0%	1.5%	0.0%	
Pembina Institute	Count	0	2	0	1	1	0	4
	% within new_ovr	0.0%	14.3%	0.0%	25.0%	1.5%	0.0%	
Steve Williams	Count	3	0	0	0	2	1	6
	% within new_ovr	7.5%	0.0%	0.0%	0.0%	3.0%	1.5%	
Michael Moore (Economicst)	Count	1	0	0	0	0	0	1
	% within new_ovr	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
Monica Gattinger	Count	3	0	0	0	3	1	7
	% within new_ovr	7.5%	0.0%	0.0%	0.0%	4.5%	1.5%	
Tim McMillan	Count	1	0	0	0	2	1	4
	% within new_ovr	2.5%	0.0%	0.0%	0.0%	3.0%	1.5%	
Justin Trudeau	Count	0	0	0	0	0	5	5
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	7.6%	
Perry Bellegard	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Naomi Klein	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Rachel Notley	Count	1	0	1	0	0	1	3
	% within new_ovr							

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Question 13 -Who are the top five thought leaders when it comes to energy issues and policy in Canada? [OPEN-ENDED]*Overcode Crosstabulation

		Overcode						Total
		Academic	ENGO	Indigenous	Media	Private sector	Public sector	
		% within new_ovr	2.5%	0.0%	10.0%	0.0%	0.0%	1.5%
Andrew wheeler	Count	1	0	0	0	0	0	1
	% within new_ovr	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
David Keith	Count	1	0	0	0	0	0	1
	% within new_ovr	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
Peter Tertzakian	Count	1	0	0	0	4	1	6
	% within new_ovr	2.5%	0.0%	0.0%	0.0%	6.0%	1.5%	
Dave Collyer	Count	0	0	0	0	2	1	3
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	3.0%	1.5%	
Pierre Alvarez	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Marlo Reynolds	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Gord Lambert	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Brenda Kenny	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Dawn Farrel	Count	0	0	0	0	1	1	2
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	1.5%	
Charlie Fischer	Count	1	0	0	0	0	0	1
	% within new_ovr	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
Chris Henderson	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	

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2017-1059 – Positive Energy Panel – Wave 2 Participant Categories – STAT SHEET

Question 13 -Who are the top five thought leaders when it comes to energy issues and policy in Canada? [OPEN-ENDED]*Overcode Crosstabulation

		Overcode						Total
		Academic	ENGO	Indigenous	Media	Private sector	Public sector	
Lorne Trottier	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Jim Prentice - Triple Crown	Count	0	0	1	0	0	0	1
	% within new_ovr	0.0%	0.0%	10.0%	0.0%	0.0%	0.0%	
Joe Dion	Count	0	0	1	0	0	0	1
	% within new_ovr	0.0%	0.0%	10.0%	0.0%	0.0%	0.0%	
Catherine McKenna	Count	0	0	1	0	0	4	5
	% within new_ovr	0.0%	0.0%	10.0%	0.0%	0.0%	6.1%	
Jody Wilson Raybould	Count	0	0	1	0	0	0	1
	% within new_ovr	0.0%	0.0%	10.0%	0.0%	0.0%	0.0%	
Jack Mintz	Count	0	0	0	1	1	1	3
	% within new_ovr	0.0%	0.0%	0.0%	25.0%	1.5%	1.5%	
Ross McKittrick	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Tom Adams	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Michael Binnion	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Tzeporah Berman	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Caleb Behn	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
JP Pinard	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	

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		Overcode						Total
		Academic	ENGO	Indigenous	Media	Private sector	Public sector	
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Kathleen Wynne	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Isadore Day	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Provincial government	Count	1	0	1	0	0	2	4
	% within new_ovr	2.5%	0.0%	10.0%	0.0%	0.0%	3.0%	
Federal government/Prime Mnister	Count	1	0	1	0	1	3	6
	% within new_ovr	2.5%	0.0%	10.0%	0.0%	1.5%	4.5%	
Indigenous groups/ governments	Count	1	0	0	0	0	1	2
	% within new_ovr	2.5%	0.0%	0.0%	0.0%	0.0%	1.5%	
Guy Holburn	Count	1	0	0	0	1	0	2
	% within new_ovr	2.5%	0.0%	0.0%	0.0%	1.5%	0.0%	
Brad Wall	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Chris Bloomer	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Chris Ragan	Count	0	0	0	1	1	0	2
	% within new_ovr	0.0%	0.0%	0.0%	25.0%	1.5%	0.0%	
Municipal Leadership	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Mark Salkeld	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	

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		Overcode						Total
		Academic	ENGO	Indigenous	Media	Private sector	Public sector	
Graham Campbell	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Elizabeth May	Count	0	0	0	0	0	3	3
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%	
Pollution probe	Count	1	0	0	0	1	0	2
	% within new_ovr	2.5%	0.0%	0.0%	0.0%	1.5%	0.0%	
George Hoberg	Count	1	0	0	0	0	0	1
	% within new_ovr	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	
Lorraine Mitchelmore	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Philip Cross	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Unsure	Count	0	1	0	0	1	0	2
	% within new_ovr	0.0%	7.1%	0.0%	0.0%	1.5%	0.0%	
John Williamson	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Provincial regulators	Count	0	0	1	0	0	0	1
	% within new_ovr	0.0%	0.0%	10.0%	0.0%	0.0%	0.0%	
National Energy Board	Count	0	0	1	0	0	0	1
	% within new_ovr	0.0%	0.0%	10.0%	0.0%	0.0%	0.0%	
Gwyn Morgan	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Debra Yedlin	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	

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		Overcode						Total
		Academic	ENGO	Indigenous	Media	Private sector	Public sector	
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
CAPP	Count	0	0	0	0	1	1	2
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	1.5%	
Joe Dionne	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
QUEST	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Byng Geraud	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Ian Anderson	Count	0	0	0	0	1	1	2
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	1.5%	
Anouk Kendall	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Judy Fairbairn	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Special Interests	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
University of Calgary School of Public Policy	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Sue Riddell Rose	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
Canada West Foundation	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	

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		Overcode						
		Academic	ENGO	Indigenous	Media	Private sector	Public sector	Total
Barry Perry	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	
MAC	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	
Total	Count	40	14	10	4	67	66	201

Percentages and totals are based on responses.

a. Group



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QUESTION 14 - Who are the top five thought leaders when it comes to environmental issues and policy in Canada? [OPEN-ENDED]*Overcode Crosstabulation

			Overcode						Total
			Academic	ENGO	Indigenous	Media	Private sector	Public sector	
QUESTION 14 - Who are the top five thought leaders when it comes to environmental issues and policy in Canada? [OPEN-ENDED] ^a	Government (general)	Count	1	0	0	0	0	0	1
		% within new_ovr	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	
	Provincial Deputy Ministers	Count	0	0	0	0	2	0	2
		% within new_ovr	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	
	David Suzuki	Count	0	2	0	0	2	4	8
		% within new_ovr	0.0%	13.3%	0.0%	0.0%	4.1%	8.7%	
	Jim Carr	Count	0	0	0	0	1	0	1
		% within new_ovr	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	
	Academics	Count	2	0	0	0	0	0	2
		% within new_ovr	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	
	Oil and gas industry	Count	3	0	0	0	0	0	3
		% within new_ovr	9.4%	0.0%	0.0%	0.0%	0.0%	0.0%	
	The public	Count	1	0	1	0	0	0	2
		% within new_ovr	3.1%	0.0%	16.7%	0.0%	0.0%	0.0%	
	Media	Count	0	1	0	0	0	0	1
		% within new_ovr	0.0%	6.7%	0.0%	0.0%	0.0%	0.0%	
	Non-governmental organizations	Count	6	2	0	0	0	0	8
		% within new_ovr	18.8%	13.3%	0.0%	0.0%	0.0%	0.0%	
	Politicians	Count	1	1	0	0	0	1	3
		% within new_ovr	3.1%	6.7%	0.0%	0.0%	0.0%	2.2%	
	Other	Count	0	1	0	0	1	1	3
		% within new_ovr	0.0%	6.7%	0.0%	0.0%	2.0%	2.2%	
	Fraser Institute	Count	0	0	0	0	2	0	2
		% within new_ovr							

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		Overcode						Total
		Academic	ENGO	Indigenous	Media	Private sector	Public sector	
		% within new_ovr	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%
Andrew Leach	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	
Mark Jaccard	Count	1	1	0	0	2	0	4
	% within new_ovr	3.1%	6.7%	0.0%	0.0%	4.1%	0.0%	
Pembina Institute	Count	0	2	0	0	1	0	3
	% within new_ovr	0.0%	13.3%	0.0%	0.0%	2.0%	0.0%	
Justin Trudeau	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	
Naomi Klein	Count	0	0	0	0	0	3	3
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	6.5%	
Marlo Raynolds	Count	0	0	0	0	2	0	2
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	
Lorne Trottier	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	
Catherine McKenna	Count	2	0	0	2	3	5	12
	% within new_ovr	6.3%	0.0%	0.0%	66.7%	6.1%	10.9%	
Ross McKittrick	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	
Tzeporah Berman	Count	0	0	0	0	2	1	3
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	4.1%	2.2%	
Provincial government	Count	1	0	3	0	0	1	5
	% within new_ovr	3.1%	0.0%	50.0%	0.0%	0.0%	2.2%	

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		Overcode						Total
		Academic	ENGO	Indigenous	Media	Private sector	Public sector	
Federal government/Prime Mnister	Count	0	0	1	0	0	3	4
	% within new_ovr	0.0%	0.0%	16.7%	0.0%	0.0%	6.5%	
Indigenous groups/ governments	Count	1	0	0	0	0	0	1
	% within new_ovr	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	
Brad Wall	Count	0	0	0	0	2	1	3
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	4.1%	2.2%	
Chris Ragan	Count	2	0	0	0	2	2	6
	% within new_ovr	6.3%	0.0%	0.0%	0.0%	4.1%	4.3%	
Elizabeth May	Count	0	0	0	0	0	5	5
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	10.9%	
Pollution probe	Count	0	0	0	0	4	0	4
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	8.2%	0.0%	
Unsure	Count	0	1	0	0	1	0	2
	% within new_ovr	0.0%	6.7%	0.0%	0.0%	2.0%	0.0%	
QUEST	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	
Bruce Lourie	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	
Robyn Gray	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	
Lisa DeMarco	Count	0	0	0	0	2	0	2
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	
MRU Institute for Environmental Sustainability	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	

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		Overcode						Total
		Academic	ENGO	Indigenous	Media	Private sector	Public sector	
% within new_ovr		0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	
Steven Guilbeault (Equiterre)	Count	0	1	0	0	0	0	1
	% within new_ovr	0.0%	6.7%	0.0%	0.0%	0.0%	0.0%	
Stewart Elgie (Smart Prosperity)	Count	2	1	0	0	2	0	5
	% within new_ovr	6.3%	6.7%	0.0%	0.0%	4.1%	0.0%	
Shannon Phillips	Count	2	0	0	0	0	1	3
	% within new_ovr	6.3%	0.0%	0.0%	0.0%	0.0%	2.2%	
Gregor Robertson	Count	1	0	0	0	0	0	1
	% within new_ovr	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	
Derek Fox	Count	1	0	0	0	0	0	1
	% within new_ovr	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	
Ken Ogilvie	Count	0	0	0	0	2	1	3
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	4.1%	2.2%	
Will Amos	Count	1	0	0	0	0	0	1
	% within new_ovr	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	
Rob de Loe	Count	0	1	0	0	0	0	1
	% within new_ovr	0.0%	6.7%	0.0%	0.0%	0.0%	0.0%	
Merran Smith	Count	0	0	0	0	3	0	3
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	6.1%	0.0%	
Stephen Lucas	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	
Marilyn Flett	Count	0	0	1	0	0	0	1
	% within new_ovr	0.0%	0.0%	16.7%	0.0%	0.0%	0.0%	

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		Overcode						Total
		Academic	ENGO	Indigenous	Media	Private sector	Public sector	
Andrew Nikoforuk	Count	0	0	0	0	0	2	2
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	
Scott Vaughan	Count	1	0	0	1	0	0	2
	% within new_ovr	3.1%	0.0%	0.0%	33.3%	0.0%	0.0%	
Derek Nighbor	Count	0	0	0	0	0	2	2
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	
David Runnals	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	
Mark Cameron	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	
Denis Coderre	Count	1	0	0	0	0	0	1
	% within new_ovr	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	
Mike de Souza	Count	0	1	0	0	0	0	1
	% within new_ovr	0.0%	6.7%	0.0%	0.0%	0.0%	0.0%	
CEN	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	
WCEL	Count	0	0	0	0	0	2	2
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	
CPAWS	Count	0	0	0	0	0	1	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	
Denise Mullen	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	
Stewart Muir	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	

Nanos conducted a survey of 88 online responses of energy and environmental leaders between September 26th and November 27th, 2017. No margin of error applies to this research.

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2017-1059 – Positive Energy Panel – Wave 2 Participant Categories – STAT SHEET

QUESTION 14 - Who are the top five thought leaders when it comes to environmental issues and policy in Canada? [OPEN-ENDED]*Overcode Crosstabulation

		Overcode						Total
		Academic	ENGO	Indigenous	Media	Private sector	Public sector	
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	
Richard Garneau	Count	0	0	0	0	1	0	1
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	
Elyse Allen	Count	0	0	0	0	2	0	2
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	
Supreme Courts	Count	2	0	0	0	0	0	2
	% within new_ovr	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	
Special Interests	Count	0	0	0	0	0	6	6
	% within new_ovr	0.0%	0.0%	0.0%	0.0%	0.0%	13.0%	
Total	Count	32	15	6	3	49	46	151

Percentages and totals are based on responses.

a. Group

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