On National Energy Projects, Canadians back Ottawa, But Seek Balance

Positive Energy Survey Findings, Release 1 of 3
Submitted by Nanos Research to Positive Energy, April 2018
(Submission 2018-1169)

NANOS

uOttawa

Summary

A majority of Canadians feel it is possible or somewhat possible for Canada to protect the environment while developing energy resources, while a comfortable majority also feel that protecting the environment should be given priority even if it leads to slower economic growth. Canadians say the federal government should lead decision-making for both major pipeline projects and reducing greenhouse gas emissions, although overall Canadians say Canada does a poor or very poor job at a number of policies and issues related to energy in Canada, such as balancing the concerns of local communities and building public confidence in energy projects.

Final decision-making authority

Canadians most often say independent federal or provincial regulatory agencies should have final decision-making powers for federal and provincial energy projects respectively, over federal and provincial cabinets, federal or provincial governments, local governments, and indigenous governments.

- **Canadians most often say an independent federal regulatory agency should have the final decision-making power for national energy projects** – Asked who should have the final decision-making power when it comes to national energy projects, more than one in three Canadians say an independent federal regulatory agency (36%), followed by the federal cabinet (25%), provincial governments (12%), local or municipal governments affected by projects (eight per cent), and Indigenous governments whose land is affected by projects (seven per cent). Ten per cent say other, and three per cent are unsure.
- **Canadians most often say an independent provincial or territorial regulatory agency should have the final decision-making power for provincial or territorial energy projects** – Asked who should have the final decision-making power when it comes to provincial or territorial energy projects, nearly four in ten Canadians say an independent provincial or territorial regulatory agency (38%), followed by the provincial or territorial cabinet (32%), local or municipal governments in the province or territory affected by projects (11 per cent), and Indigenous governments in the province or territory whose land is affected by projects (six per cent). Ten per cent say other, and three per cent are unsure.
- **More than two in three Canadians say the federal government should lead decision-making for major pipeline projects** – Asked whether the federal or provincial government should lead decision-making for major pipeline projects, 68 per cent say major pipeline projects, while 25 per cent say provincial governments, and seven per cent are unsure.
- **Over six in ten Canadians say the federal government should lead decision-making for reducing greenhouse gas emissions** – Asked whether the federal or provincial government should lead decision-making for reducing greenhouse gas emissions, 67 per cent say major pipeline projects, while 27 per cent say provincial governments, and six per cent are unsure.

Canada and energy projects

Canadians say the federal government should lead decision-making for both major pipeline projects and reducing greenhouse gas emissions, and the majority feel it is possible or somewhat possible for Canada to protect the environment while developing energy resources. Overall Canadians say Canada does a poor or very poor job at a number of policies and issues related to energy in Canada, such as balancing the concerns of local communities and building public confidence in energy projects, but think Canada has about the same level of credibility for these issues on the world stage as other countries.

- **Nine in ten Canadians think it is possible or somewhat possible for Canada to develop its energy resources while protecting the environment** – The majority of Canadians think it is possible (54%) or somewhat possible (36%) for Canada to develop its energy resources while protecting the environment, while seven per cent think it is somewhat not possible and two per cent think it is not possible. One per cent are unsure.
- **Canadians most often say Canada does a poor or very poor job at balancing the concerns of local communities affected by a local energy project with broader interests** – Nearly half of Canadians say Canada does a poor (33%) or very poor (14%) job at balancing the concerns of local communities that are affected by a local energy infrastructure project with broader regional, provincial or national interests, while 32 per cent say average. Fourteen per cent say Canada does a good job, while three per cent say very good job and four per cent are unsure. This is consistent with the 2017 wave of research.
- **Six in ten Canadians say Canada does a poor or very poor job at building public confidence in energy decision-making, a marginal increase from 2017** – Six in ten Canadians say Canada does a poor (38%; 30% in 2017) or very poor (22%) job at building public confidence in energy decision-making, while 29 per cent say average. Eight per cent say Canada does a good job (15% in 2017), while one per cent say very good job, and two per cent are unsure.
- **Canadians most often say Canada does a poor or very poor job of providing clear, predictable and competitive policy and regulatory environment** – Just under half of Canadians say Canada does a poor (29%) or very poor (18%) job at providing a clear, predictable and competitive policy and regulatory environment for energy investors, while 31 per cent say average. Ten per cent say Canada does a good job, while two per cent say very good job, and 11 per cent are unsure. This is consistent with the 2017 wave of research.
- **In line with 2017 results, half of Canadians say Canada does a poor or very poor job at developing a shared long-term vision for Canada's energy future** – One in two Canadians say Canada does a poor (33%) or very poor (18%) job at developing a shared long-term vision for Canada's energy future, while 31 per cent say average. Thirteen per cent say Canada does a good job, while three per cent say very good job, and three per cent are unsure. These results are consistent with the previous wave of research.

Trade-offs in energy decision-making

A comfortable majority of Canadians think the national interest is more important the views and rights of local residents, Indigenous peoples and people in their province, and also feel that protecting the environment should be given priority even if it leads to slower economic growth.

- **Over six in ten Canadians think the national interest is more important in a proposed energy project than the views of local residents** – More than six in ten Canadians (61%; continued increase from 57% in 2017 and 51% in 2016) say when it comes to moving a proposed energy project forward the national interest is more important, while 28 per cent say the views of local residents are more important. Eleven per cent are unsure.
- **A comfortable majority of Canadians think the national interest is more important than the rights of First Nations, Métis and Inuit people in a proposed energy project** – Over six in ten Canadians (61%) think the national interest is more important when it comes to moving a proposed energy project forward (continual increase from 54% in 2017 and 49% in 2016), while 27 per cent say the rights of First Nations, Métis and Inuit peoples are more important. Twelve per cent are unsure.
- **Six in ten Canadians think the national interest is more important in a proposed energy project than the views of people in their province**– Six in ten Canadians (60%) think the national interest is more important when it comes to moving a proposed energy project forward (consistent with 2017 and a continued increase from 49% in 2016), while 32 per cent say the views of people in their province are more important. Eight per cent are unsure.

Canada's oil and gas sector

- **Three in four Canadians agree or somewhat agree that exports from Canada's oil and gas sector can contribute to combating global climate change** – A majority of Canadians agree (43%) or somewhat agree (31%) that exports from Canada's oil and gas sector can contribute to combating global climate change if our exports displace energy sources in other countries that are more damaging to the climate, while nine per cent somewhat disagree and eight per cent disagree. Eight per cent are unsure.
- **Over eight in ten Canadians agree or somewhat agree that Canada's oil and gas sector can play an important long-term role domestically and internationally** – More than eight in ten Canadians agree (55%) or somewhat agree (30%) that Canada's oil and gas sector can play an important long-term role domestically and internationally if it operates in an environmentally responsible way. Eight per cent somewhat disagree, and six per cent disagree with this. Three per cent are unsure.
- **Nearly six in ten Canadians agree or somewhat agree that Canada should reduce oil and gas production to reduce greenhouse gas emissions even if other countries do not** – Just under six in ten Canadians agree (35%) or somewhat agree (23%) that Canada should reduce oil and gas production to reduce greenhouse gas emissions even if other oil and gas producing countries are not doing so, while 14 per cent somewhat disagree and 26 per cent disagree with this. Two per cent are unsure.

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 March 31st and April 3rd, 2018. 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. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20.

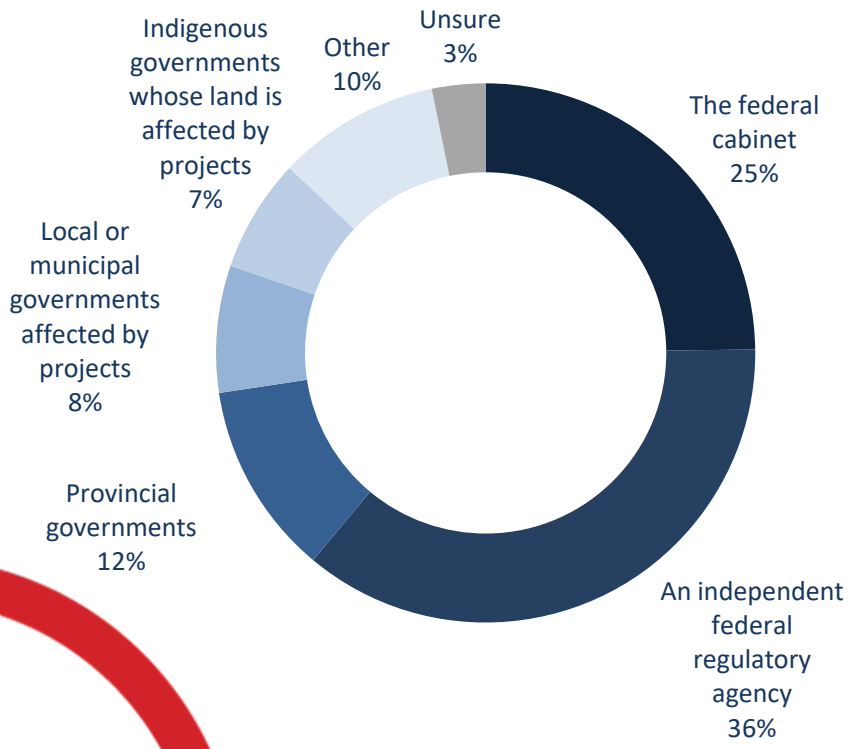
The research was commissioned by University of Ottawa Positive Energy and was conducted by Nanos Research.

This was Report 1 of 3. The remaining two reports will be released at a later date.

1.0 Final decision-making authority

Opinions on who should have final decision-making power

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



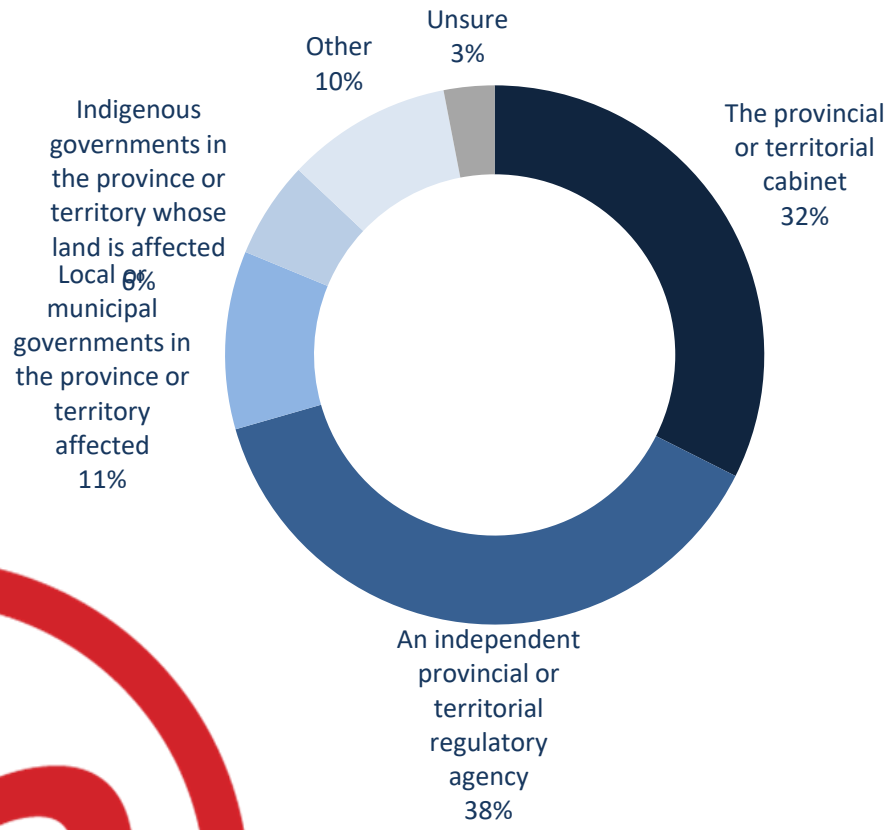
Subgroups	An independent federal regulatory agency
Atlantic (n=100)	34.2%
Quebec (n=250)	33.7%
Ontario (n=300)	37.9%
Prairies (n=200)	41.5%
British Columbia (n=150)	31.4%
Male (n=518)	34.5%
Female (n=482)	38.0%
18 to 34 (n=185)	32.4%
35 to 54 (n=396)	37.1%
55 plus (n=419)	38.2%

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

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

Opinions on who should have final decision-making power

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



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

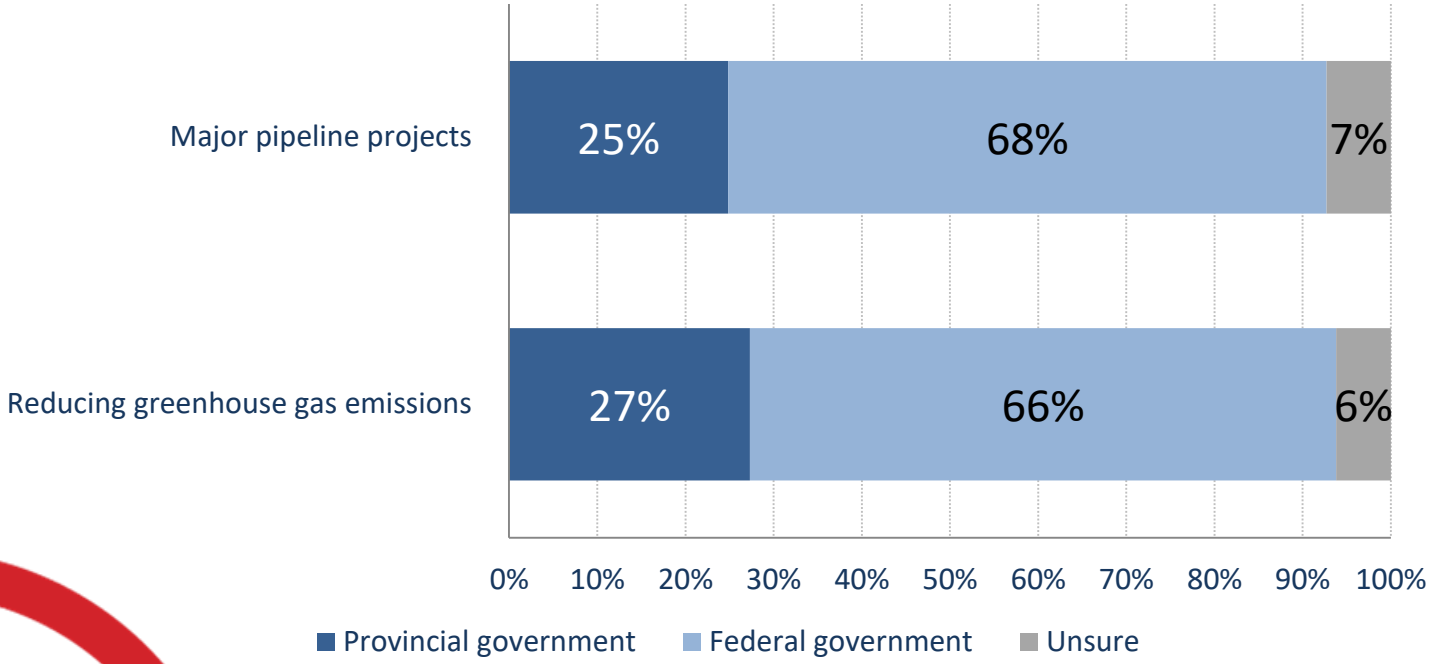
***Note: Charts may not add up to 100 due to rounding**

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

2.0 Canada and energy projects

Who should lead decision-making

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

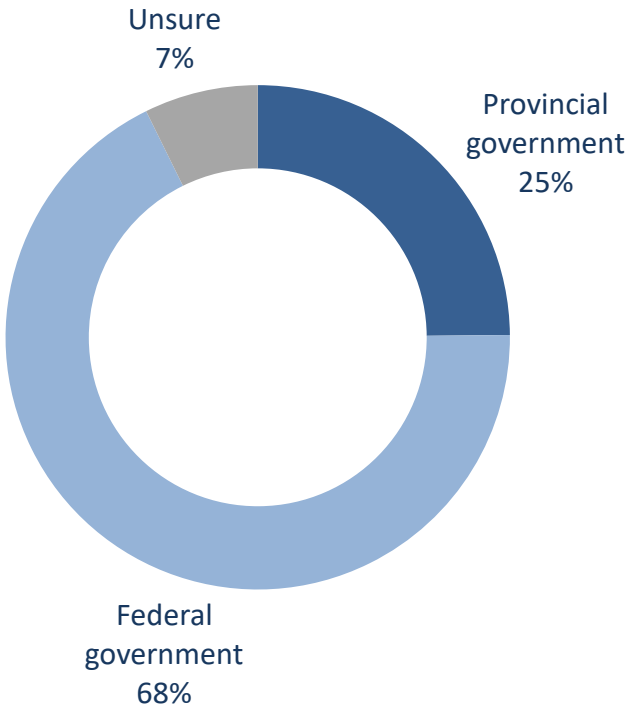


***Note: Charts may not add up to 100 due to rounding**

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

Who should lead decision-making for pipeline projects

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



Subgroups	Federal government
Atlantic (n=100)	77.4%
Quebec (n=250)	49.3%
Ontario (n=300)	77.7%
Prairies (n=200)	75.9%
British Columbia (n=150)	62.0%
Male (n=518)	71.8%
Female (n=482)	64.0%
18 to 34 (n=185)	58.9%
35 to 54 (n=396)	69.5%
55 plus (n=419)	72.6%

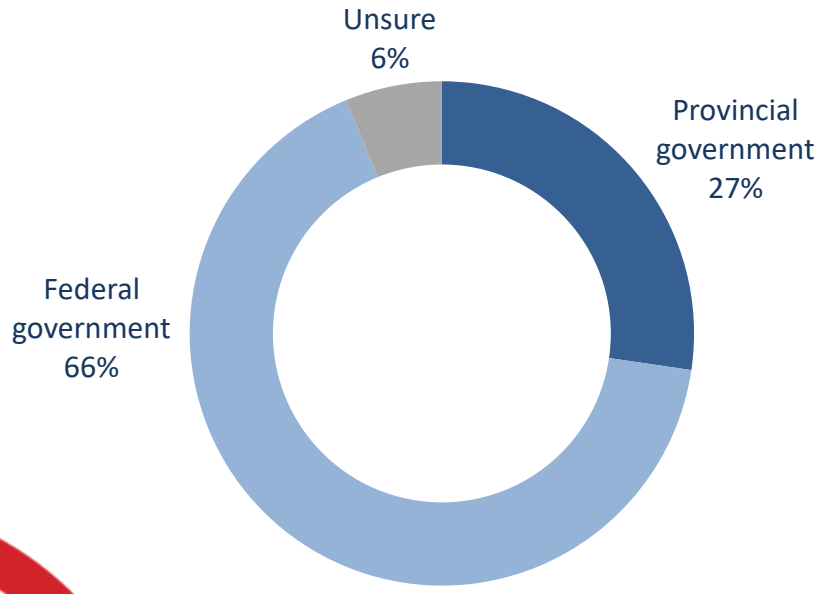
***Note: Charts may not add up to 100 due to rounding**

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

Major pipeline projects

Who should lead decision making for reducing greenhouse gas emissions

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



Subgroups	Federal government
Atlantic (n=100)	72.4%
Quebec (n=250)	62.2%
Ontario (n=300)	69.6%
Prairies (n=200)	58.1%
British Columbia (n=150)	74.5%
Male (n=518)	65.0%
Female (n=482)	67.9%
18 to 34 (n=185)	60.5%
35 to 54 (n=396)	69.1%
55 plus (n=419)	68.4%

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

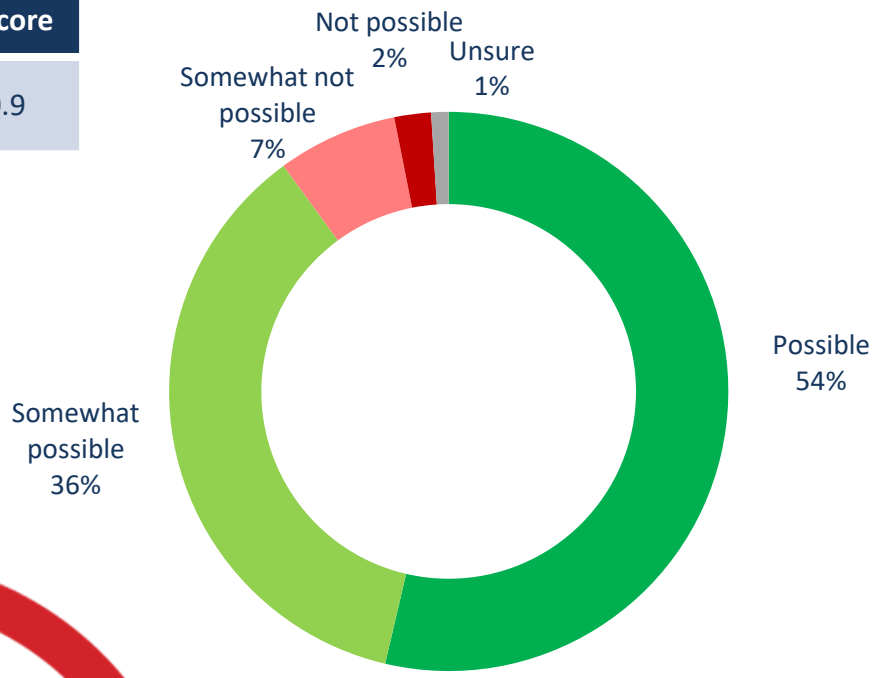
QUESTION – Should the [ROTATE] provincial or the federal level of government lead decision-making for:

Reducing greenhouse gas emissions

Possibility of developing Canadian energy sources while protecting environment

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

Net Score
+80.9



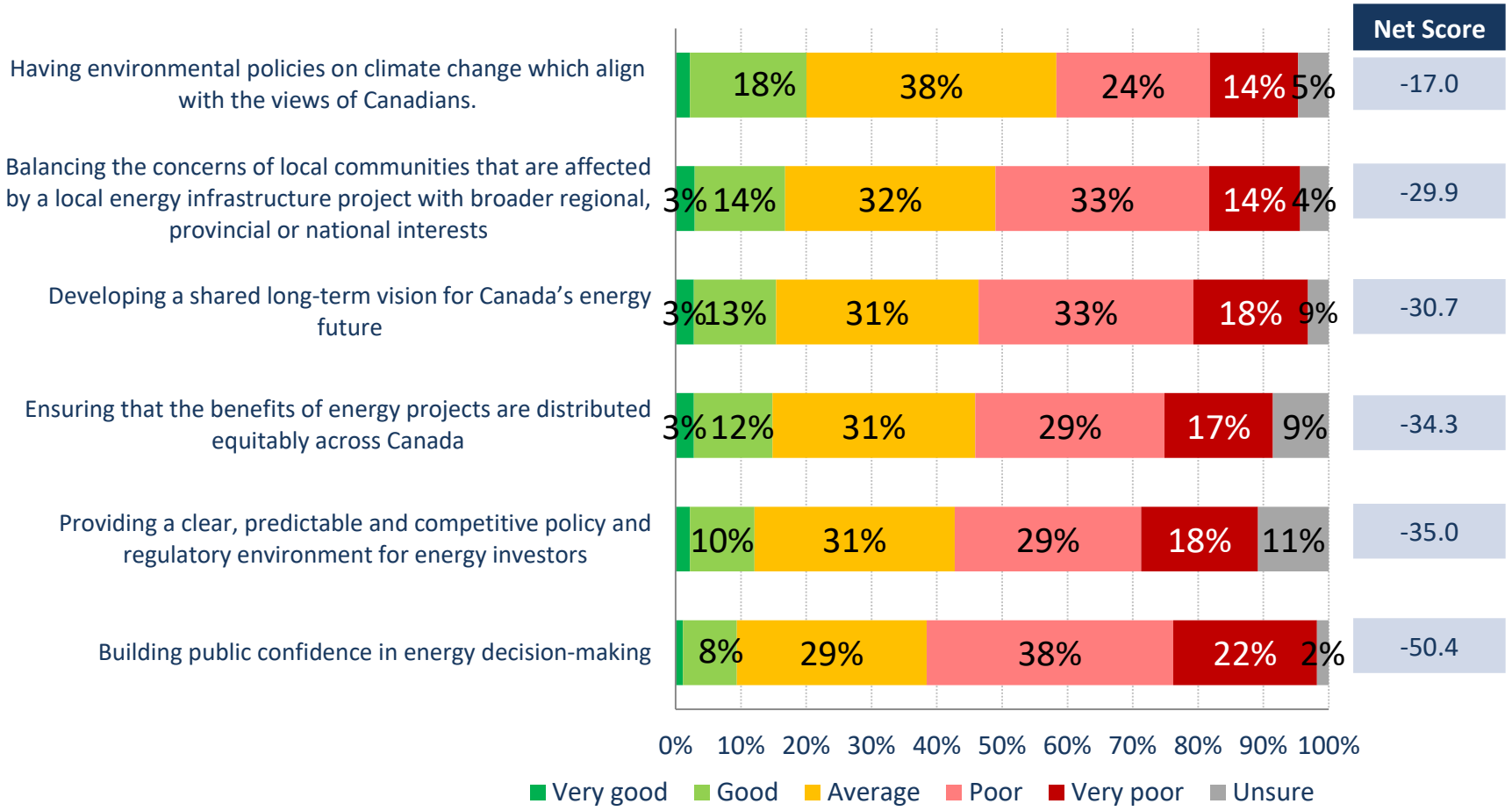
Subgroups	Possible/ Somewhat possible
Atlantic (n=100)	93.1%
Quebec (n=250)	86.2%
Ontario (n=300)	88.2%
Prairies (n=200)	95.7%
British Columbia (n=150)	89.8%
Male (n=518)	89.3%
Female (n=482)	90.6%
18 to 34 (n=185)	88.4%
35 to 54 (n=396)	89.1%
55 plus (n=419)	91.7%

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

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

Quality of job done by Canada

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

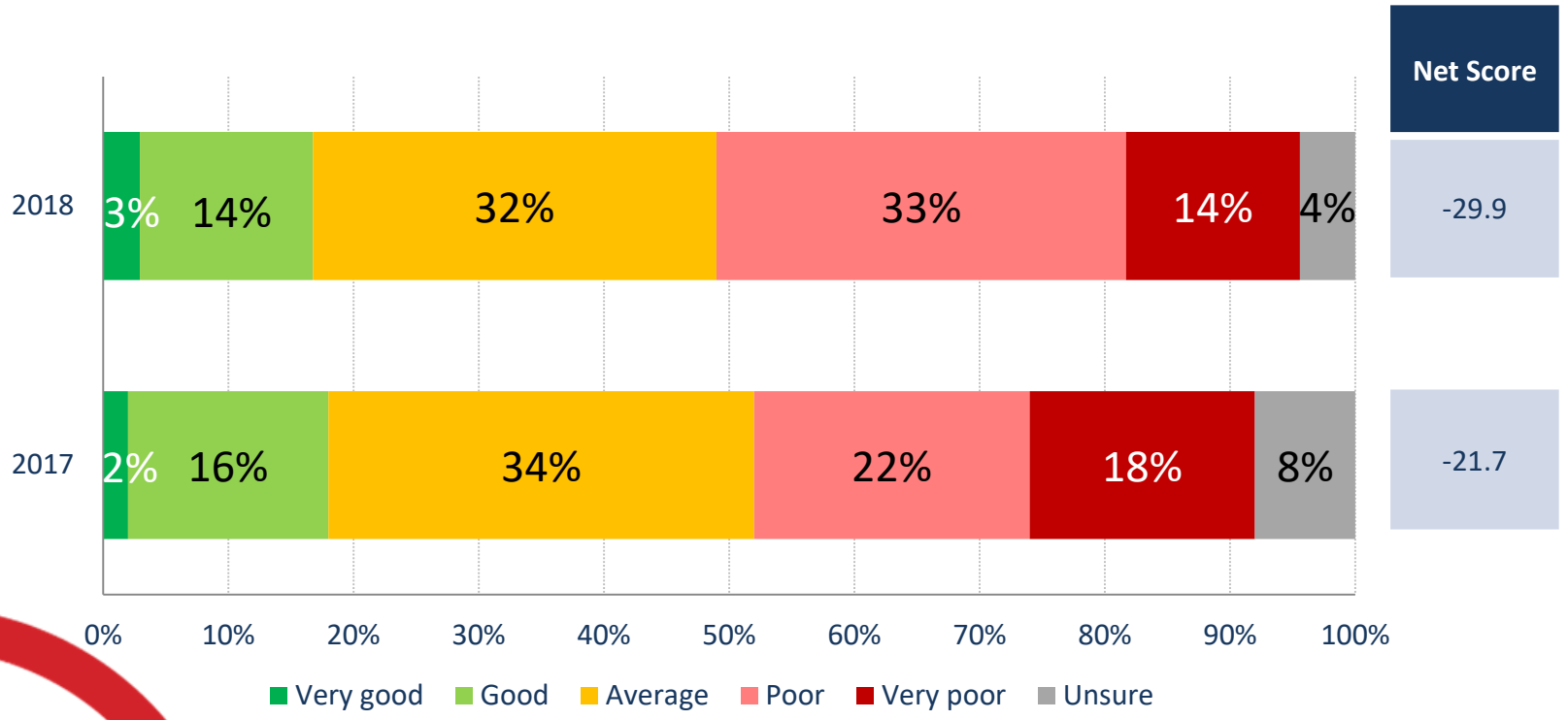


***Note: Charts may not add up to 100 due to rounding**

QUESTION – Does Canada do a very good, good, average, poor or very poor job at the following? [Randomize]

Balancing local and national goals

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

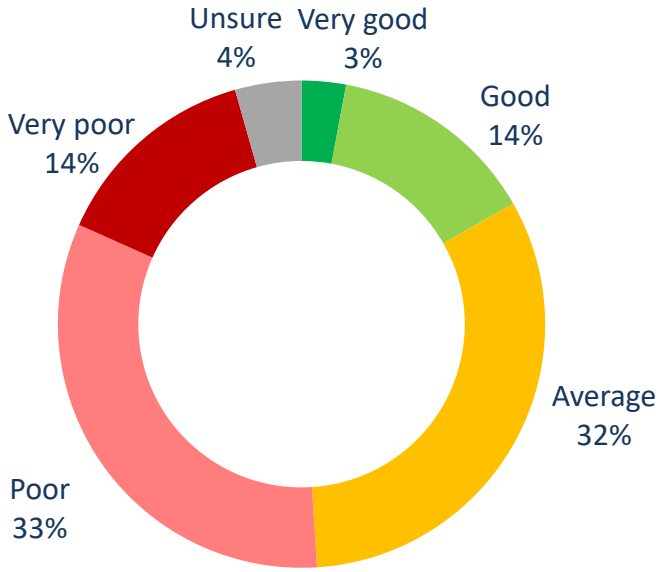
QUESTION – Does Canada do a very good, good, average, poor or very poor job at the following? [Randomize]

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

Balancing local and national goals

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

Net Score
-29.9



Subgroups	Very poor/ Poor
Atlantic (n=100)	40.8%
Quebec (n=250)	45.1%
Ontario (n=300)	46.1%
Prairies (n=200)	46.8%
British Columbia (n=150)	53.8%
Male (n=518)	43.6%
Female (n=482)	49.5%
18 to 34 (n=185)	46.6%
35 to 54 (n=396)	44.6%
55 plus (n=419)	48.4%

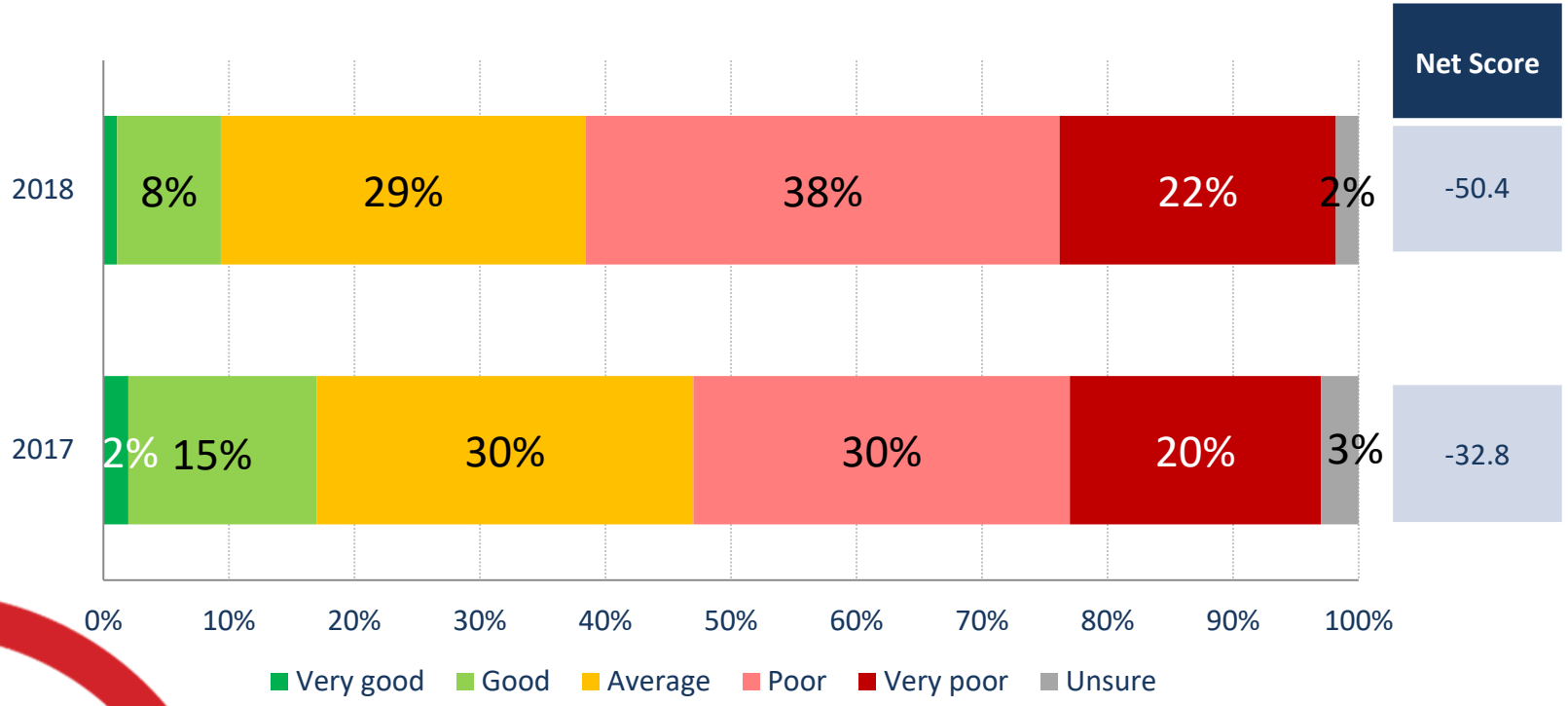
***Note: Charts may not add up to 100 due to rounding**

QUESTION – Does Canada do a very good, good, average, poor or very poor job at the following? [Randomize]

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

Building public confidence

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

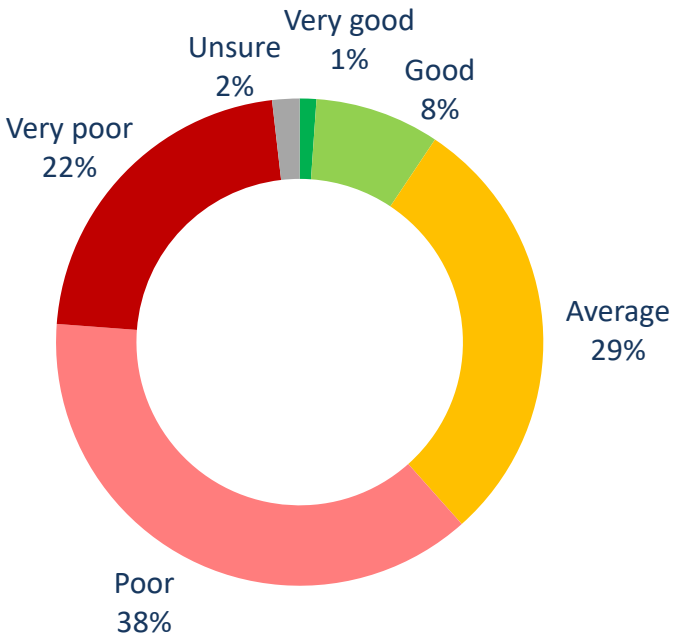
QUESTION – Does Canada do a very good, good, average, poor or very poor job at the following? [Randomize]

Building public confidence in energy decision-making

Building public confidence

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

Net Score
-50.4



Subgroups	Very poor/ Poor
Atlantic (n=100)	53.2%
Quebec (n=250)	54.1%
Ontario (n=300)	62.5%
Prairies (n=200)	60.7%
British Columbia (n=150)	66.8%
Male (n=518)	61.1%
Female (n=482)	58.5%
18 to 34 (n=185)	56.3%
35 to 54 (n=396)	62.5%
55 plus (n=419)	59.9%

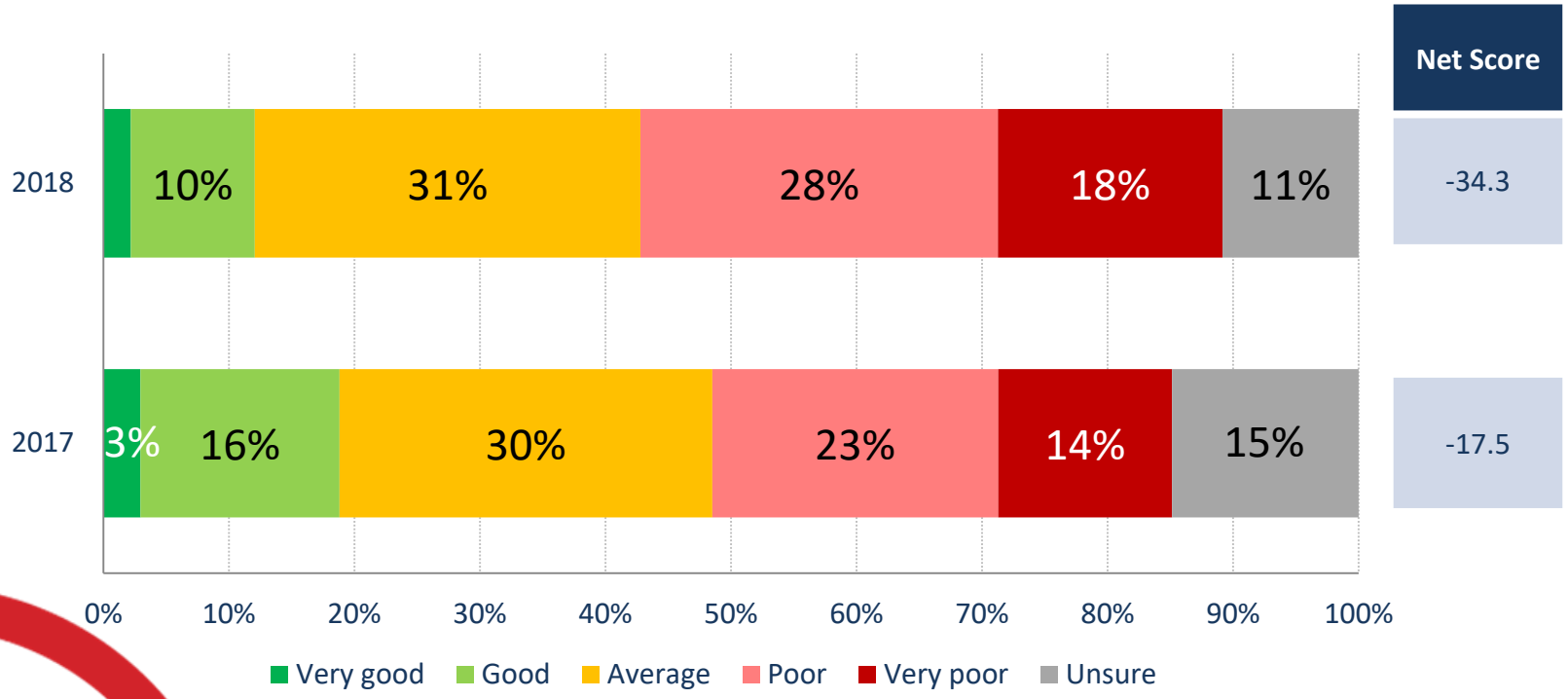
***Note: Charts may not add up to 100 due to rounding**

QUESTION – Does Canada do a very good, good, average, poor or very poor job at the following? [Randomize]

Building public confidence in energy decision-making

Providing clear policy and regulation

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

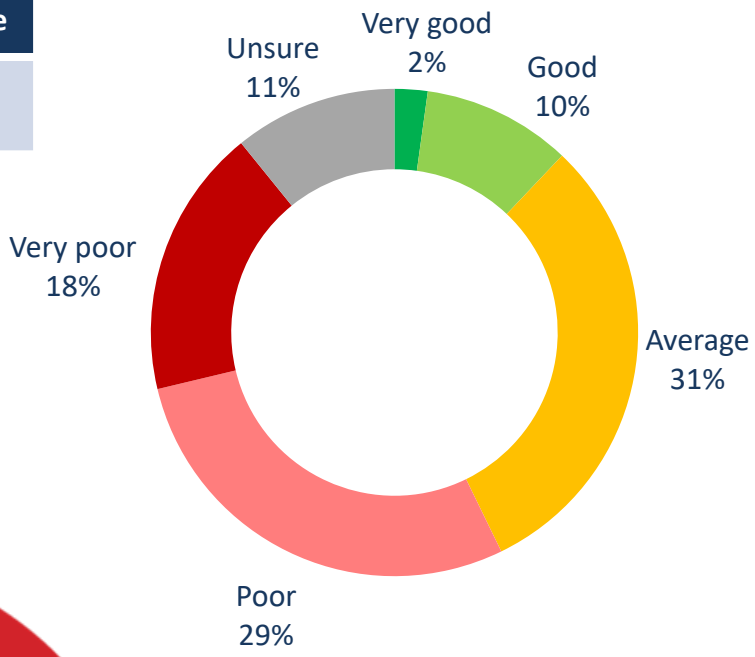
QUESTION – Does Canada do a very good, good, average, poor or very poor job at the following? [Randomize]

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

Providing policy and regulation

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

Net Score
-34.3



Subgroups	Very poor/ Poor
Atlantic (n=100)	34.5%
Quebec (n=250)	40.8%
Ontario (n=300)	49.3%
Prairies (n=200)	52.6%
British Columbia (n=150)	49.3%
Male (n=518)	49.3%
Female (n=482)	43.6%
18 to 34 (n=185)	44.9%
35 to 54 (n=396)	47.3%
55 plus (n=419)	46.6%

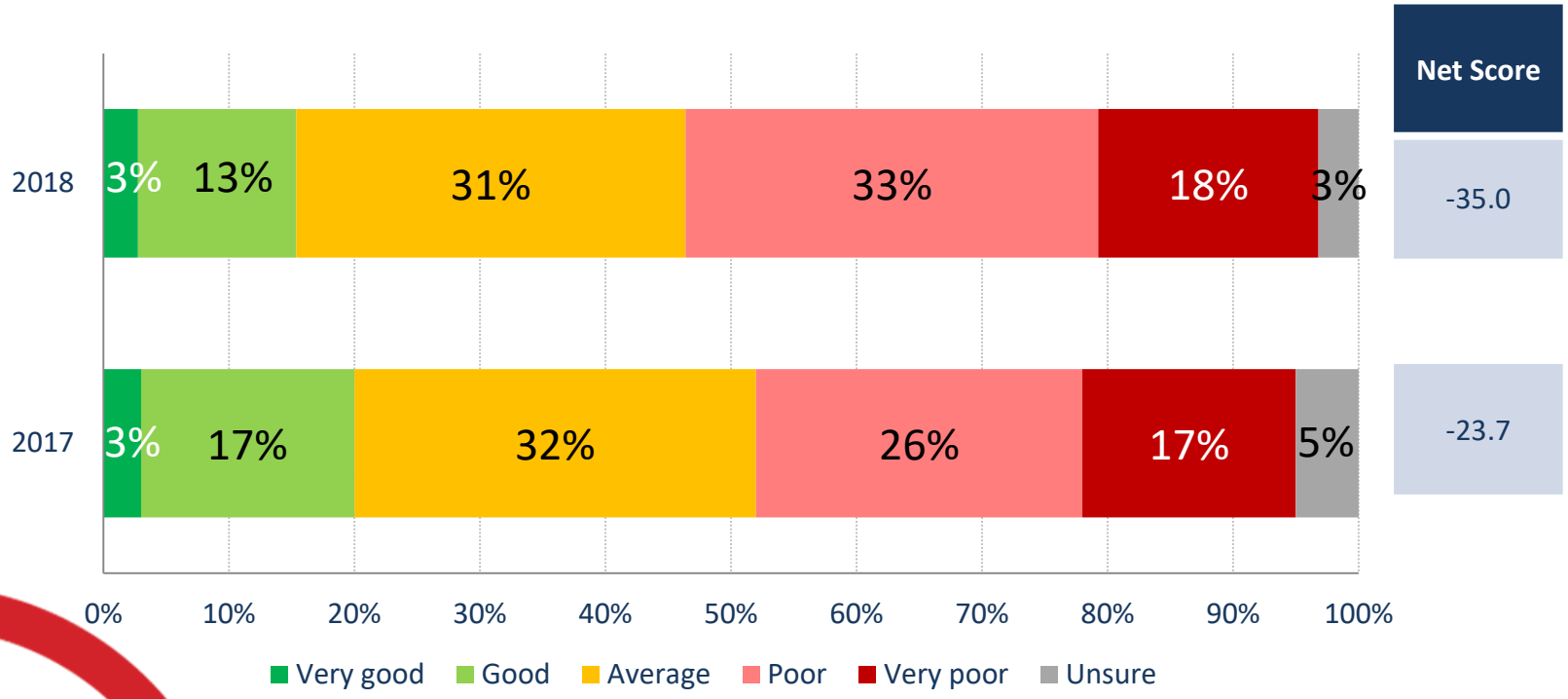
***Note: Charts may not add up to 100 due to rounding**

QUESTION – Does Canada do a very good, good, average, poor or very poor job at the following? [Randomize]

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

Developing long-term vision

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

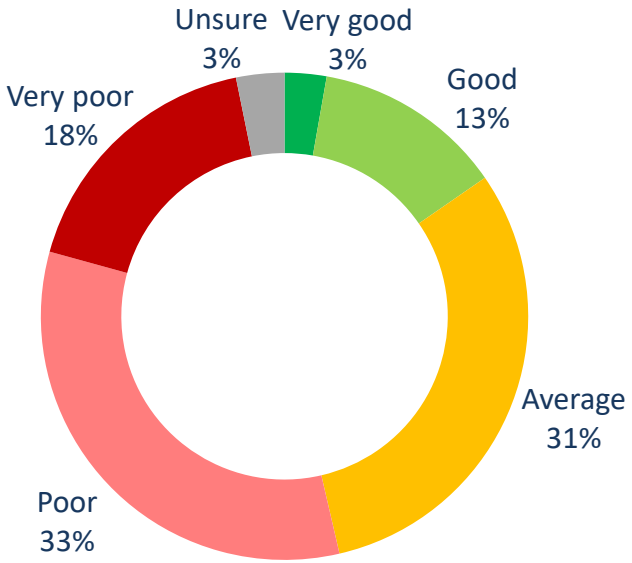
QUESTION – Does Canada do a very good, good, average, poor or very poor job at the following? [Randomize]

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

Developing long-term vision

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

Net Score
-35.0



Subgroups	Very poor/ Poor
Atlantic (n=100)	35.8%
Quebec (n=250)	45.4%
Ontario (n=300)	52.3%
Prairies (n=200)	57.9%
British Columbia (n=150)	55.0%
Male (n=518)	51.6%
Female (n=482)	49.3%
18 to 34 (n=185)	46.7%
35 to 54 (n=396)	50.9%
55 plus (n=419)	52.6%

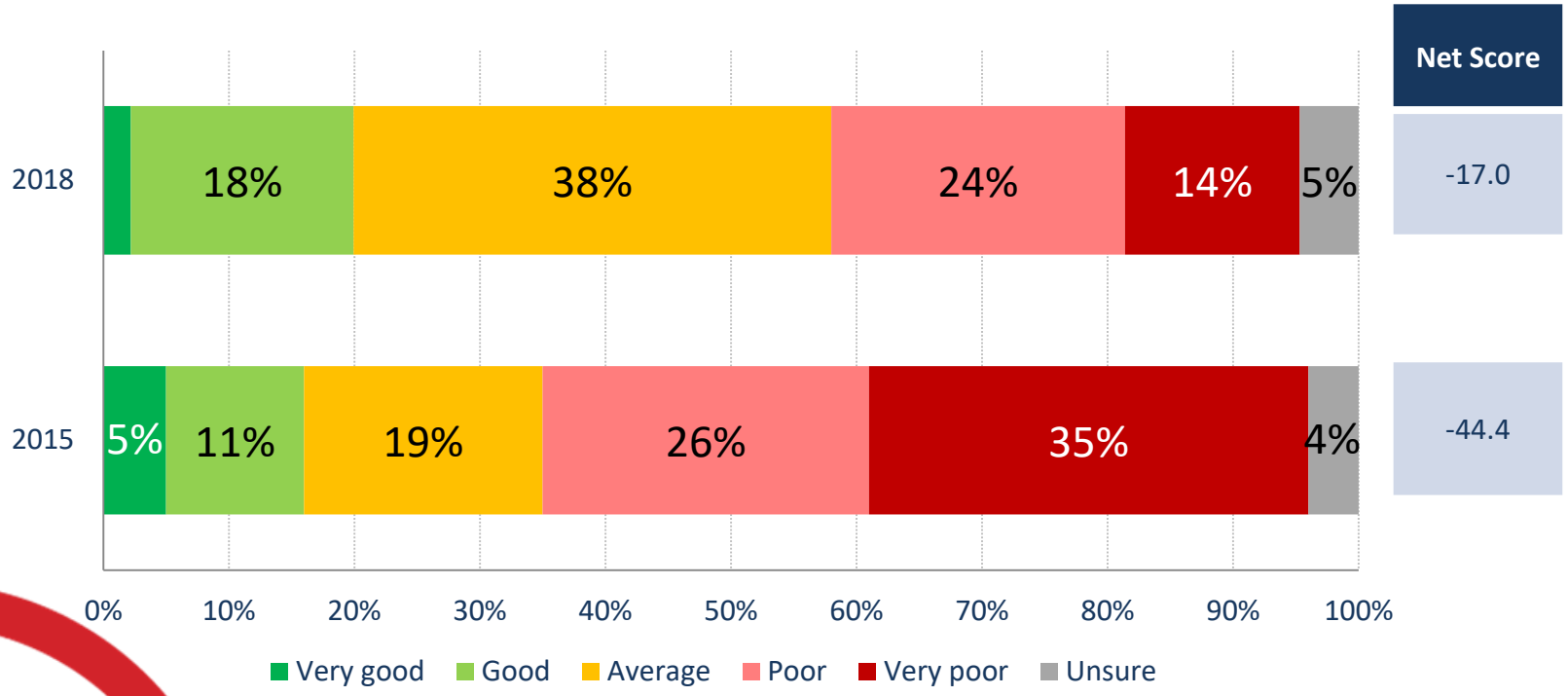
***Note: Charts may not add up to 100 due to rounding**

QUESTION – Does Canada do a very good, good, average, poor or very poor job at the following? [Randomize]

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

Environmental policies on climate change

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

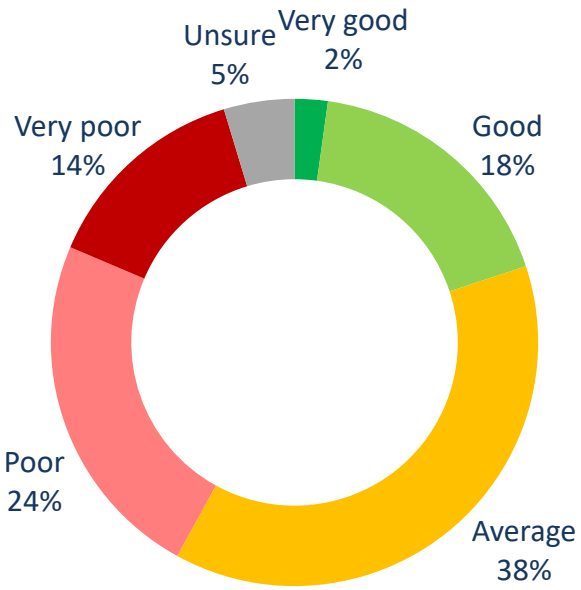
QUESTION – Does Canada do a very good, good, average, poor or very poor job at the following? [Randomize]

Having environmental policies on climate change which align with the views of Canadians

Environmental policies on climate change

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

Net Score
-17.0



Subgroups	Average
Atlantic (n=100)	44.0%
Quebec (n=250)	37.9%
Ontario (n=300)	39.2%
Prairies (n=200)	36.8%
British Columbia (n=150)	34.9%
Male (n=518)	36.3%
Female (n=482)	40.2%
18 to 34 (n=185)	39.1%
35 to 54 (n=396)	36.1%
55 plus (n=419)	39.5%

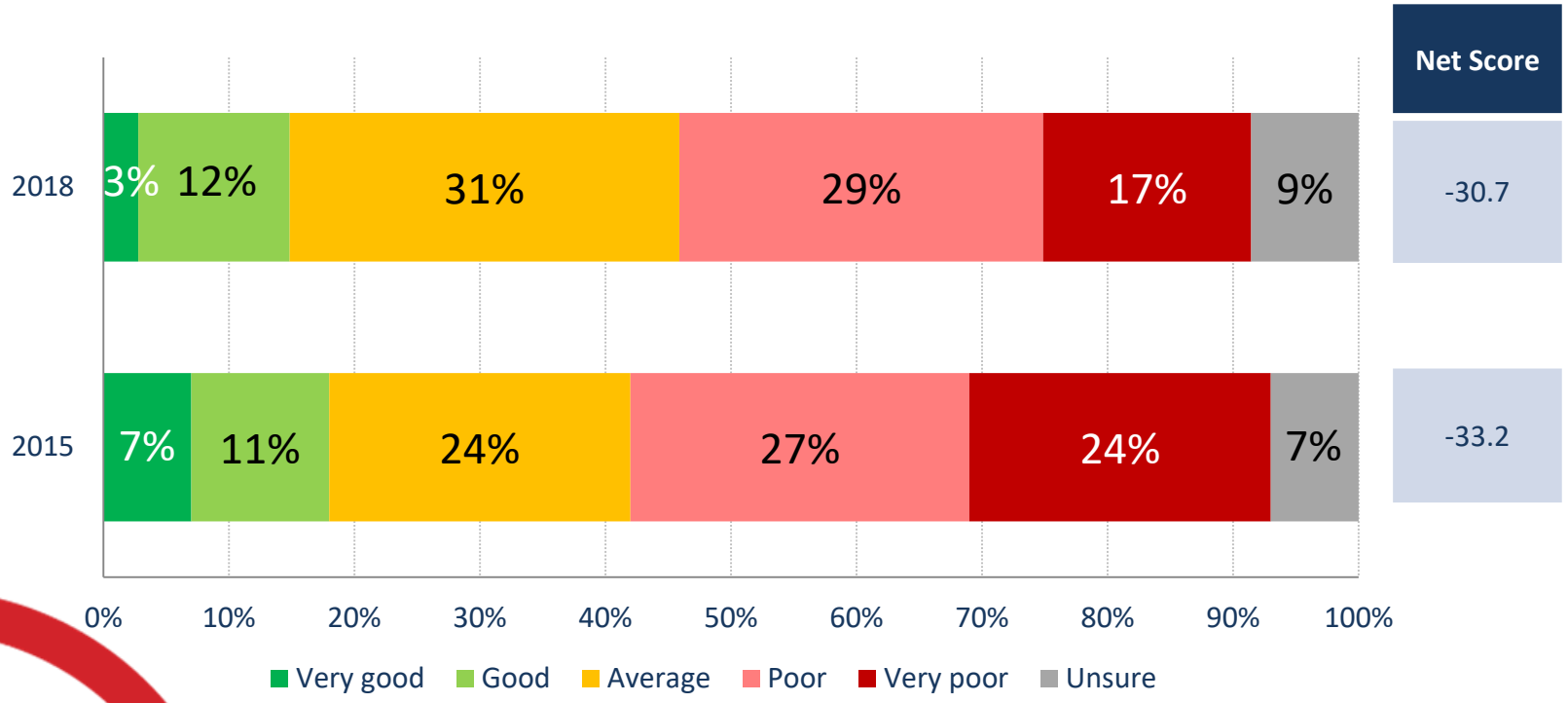
***Note: Charts may not add up to 100 due to rounding**

QUESTION – Does Canada do a very good, good, average, poor or very poor job at the following? [Randomize]

Having environmental policies on climate change which align with the views of Canadians

Benefits of energy projects

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

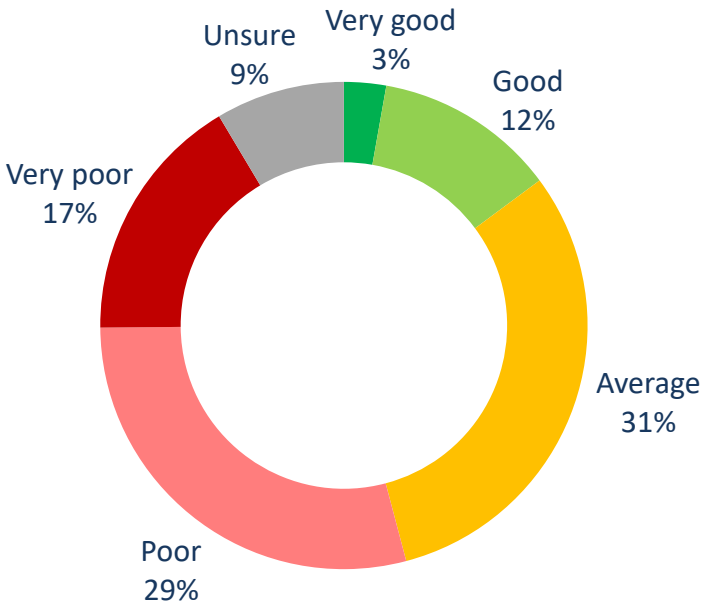
QUESTION – Does Canada do a very good, good, average, poor or very poor job at the following? [Randomize]

Ensuring that the benefits of energy projects are distributed equitably across Canada

Benefits of energy projects

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

Net Score
-30.7



Subgroups	Very poor/ Poor
Atlantic (n=100)	41.3%
Quebec (n=250)	38.8%
Ontario (n=300)	48.9%
Prairies (n=200)	48.2%
British Columbia (n=150)	49.4%
Male (n=518)	46.5%
Female (n=482)	44.7%
18 to 34 (n=185)	48.6%
35 to 54 (n=396)	44.7%
55 plus (n=419)	44.2%

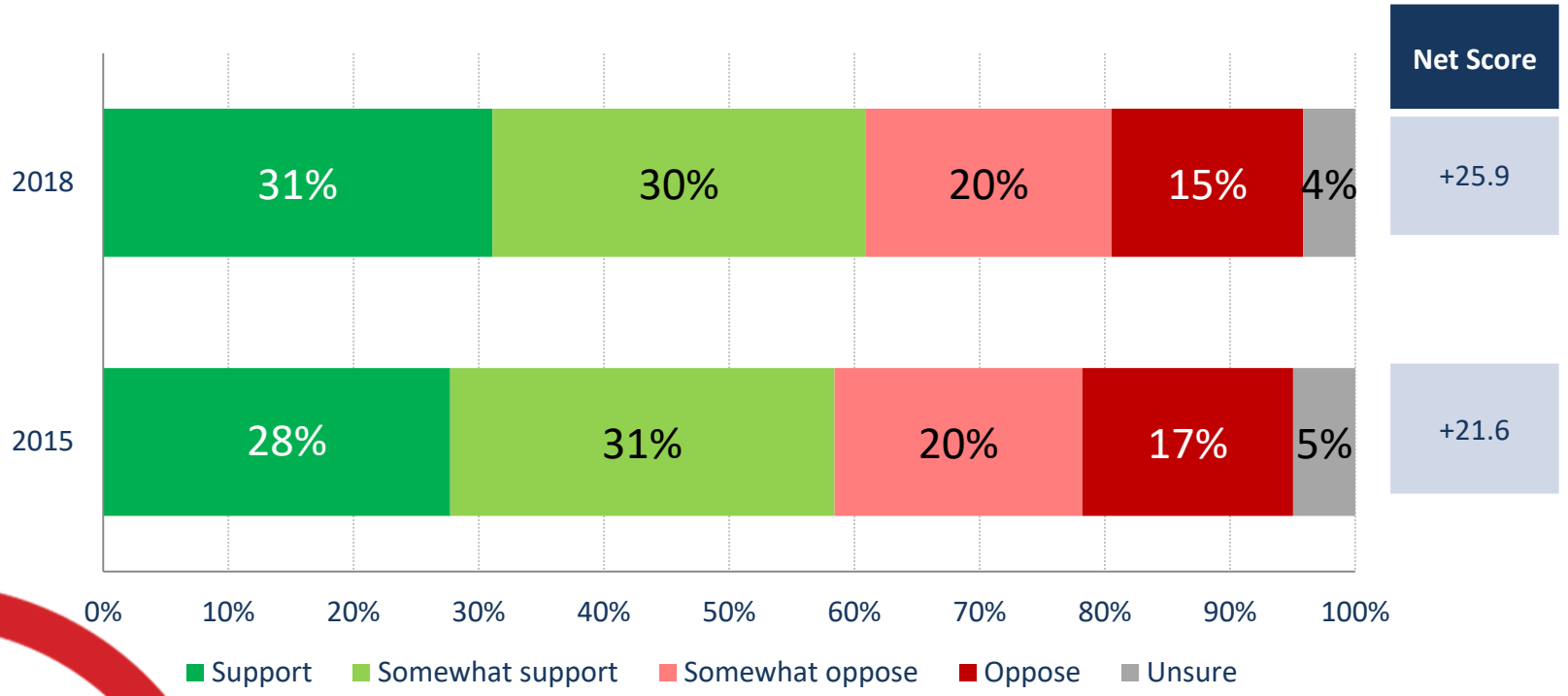
***Note: Charts may not add up to 100 due to rounding**

QUESTION – Does Canada do a very good, good, average, poor or very poor job at the following? [Randomize]

Ensuring that the benefits of energy projects are distributed equitably across Canada

Growth of oil and gas sector

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, October 15th to 16th, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

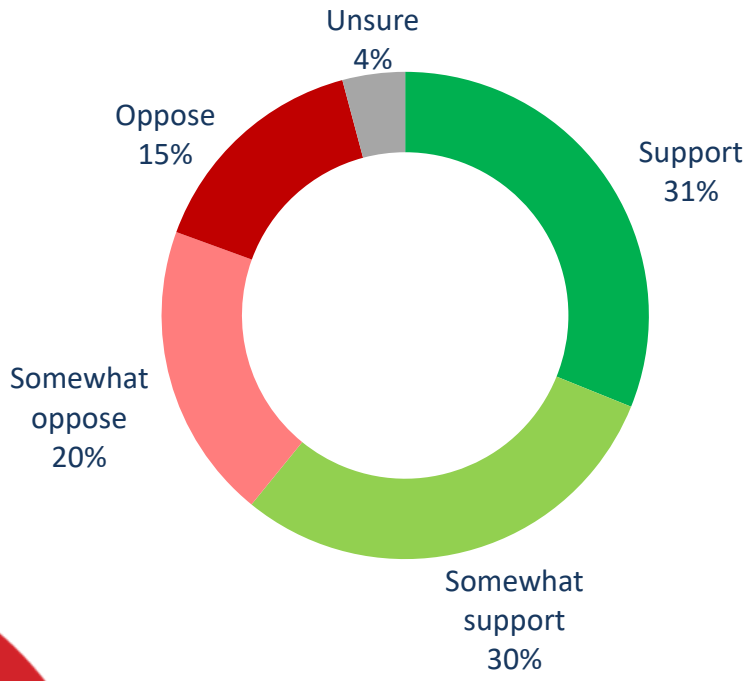
QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following: [RANDOMIZE]

Growth in the oil and gas sector in Canada?

Growth of oil and gas sector

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

Net Score
+25.9



Subgroups	Support/ Somewhat support
Atlantic (n=100)	69.4%
Quebec (n=250)	42.1%
Ontario (n=300)	63.5%
Prairies (n=200)	76.6%
British Columbia (n=150)	60.3%
Male (n=518)	65.4%
Female (n=482)	56.5%
18 to 34 (n=185)	51.9%
35 to 54 (n=396)	62.6%
55 plus (n=419)	65.6%

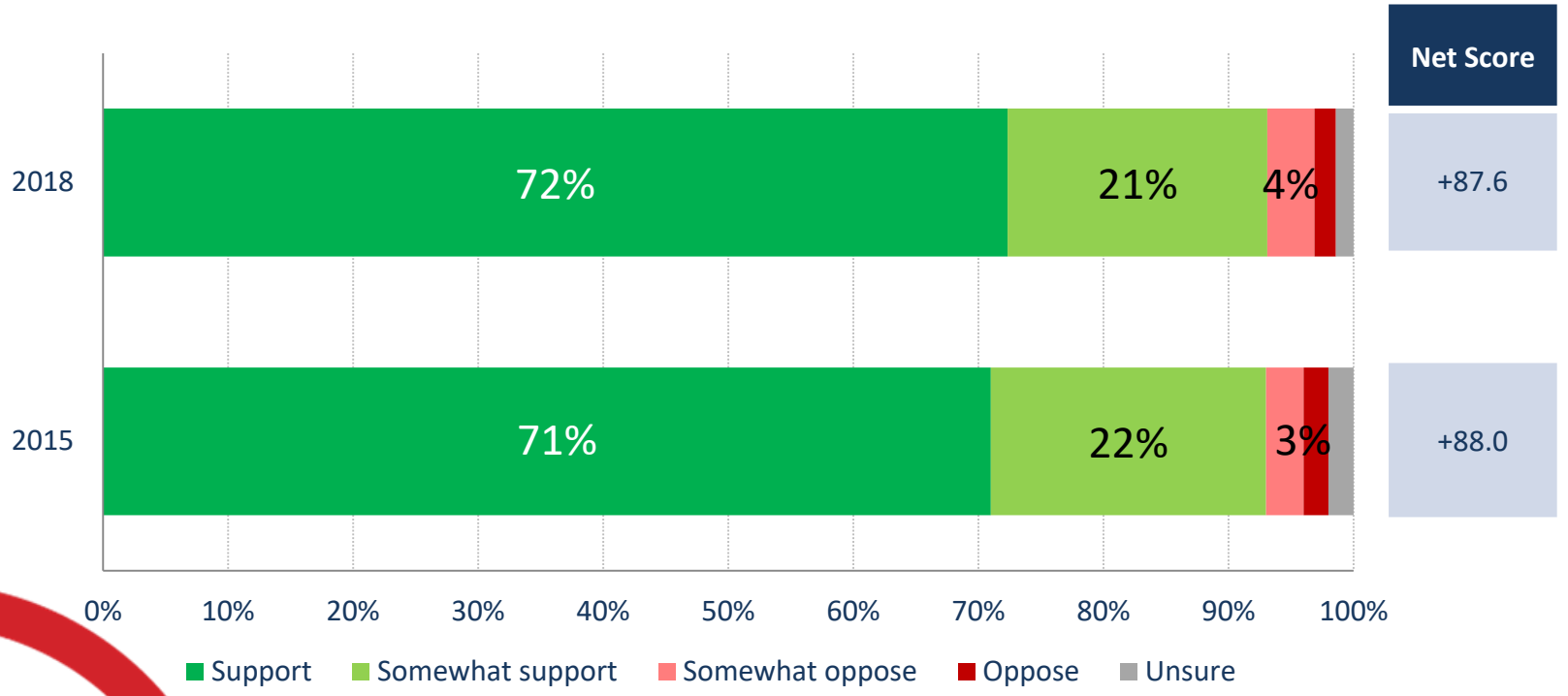
***Note: Charts may not add up to 100 due to rounding**

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following: [RANDOMIZE]

Growth in the oil and gas sector in Canada?

Growth of renewable energy sector

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, October 15th to 16th, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

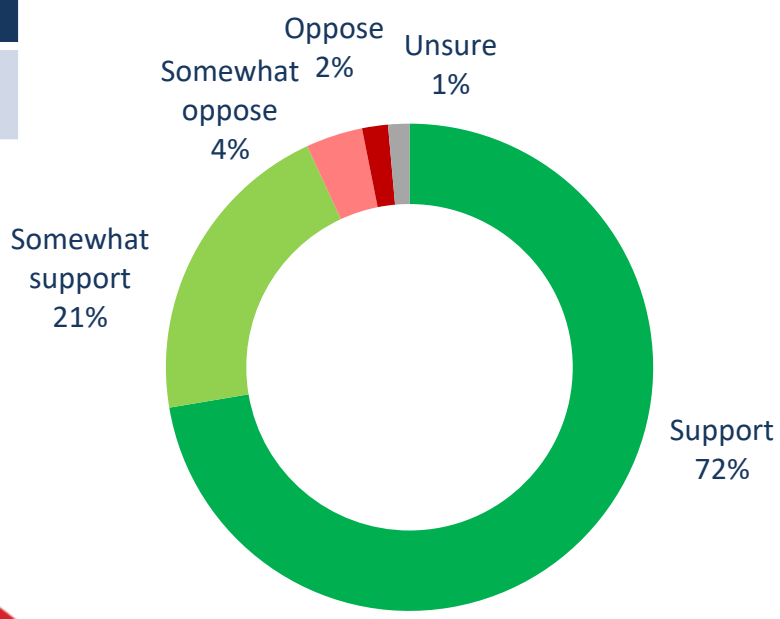
QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following: [RANDOMIZE]

Growth in the renewable energy sector in Canada?

Growth of renewable energy sector

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

Net Score
+87.6



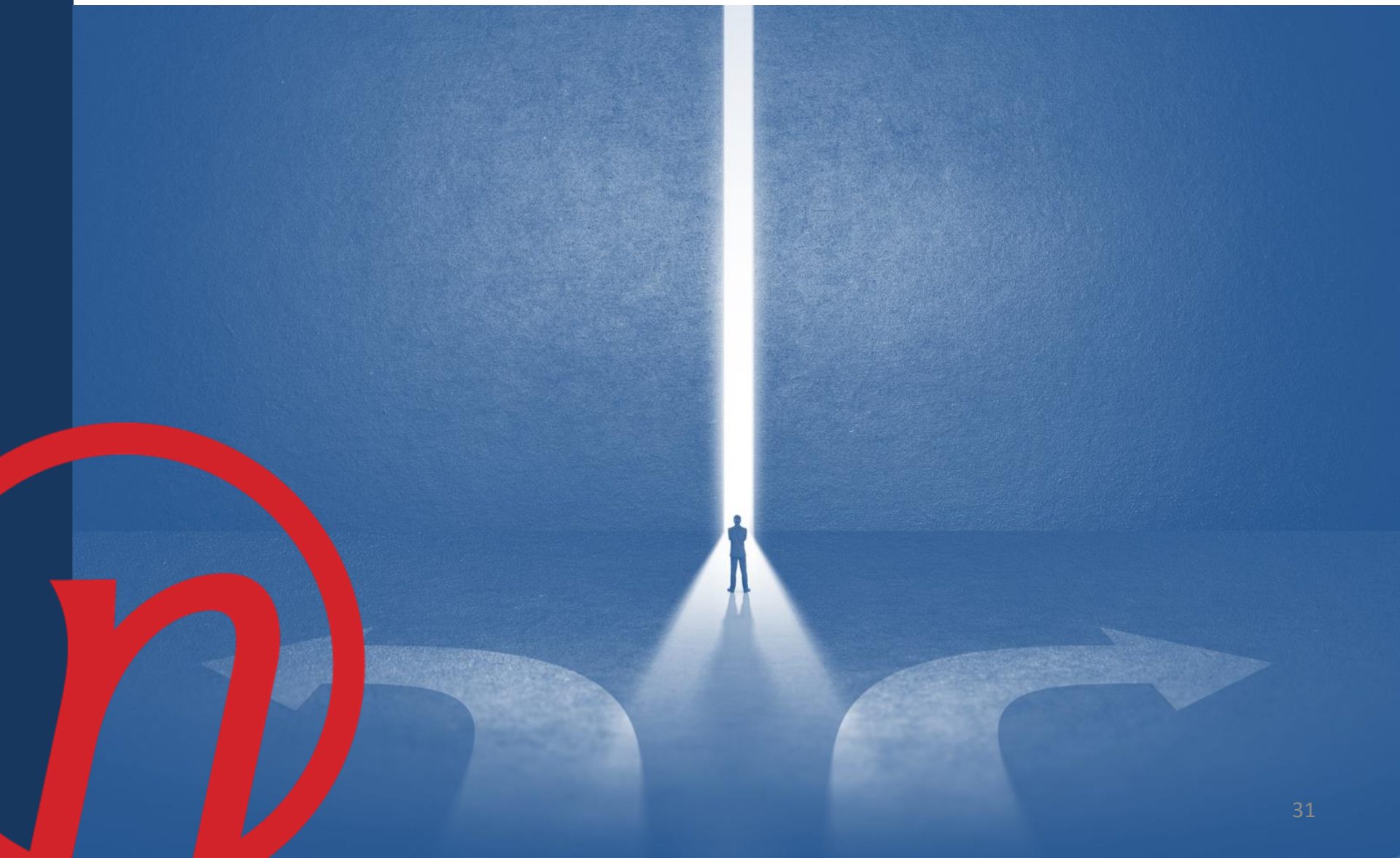
Subgroups	Support/ Somewhat support
Atlantic (n=100)	96.1%
Quebec (n=250)	95.6%
Ontario (n=300)	90.2%
Prairies (n=200)	91.0%
British Columbia (n=150)	95.4%
Male (n=518)	90.9%
Female (n=482)	95.2%
18 to 34 (n=185)	91.5%
35 to 54 (n=396)	93.3%
55 plus (n=419)	94%

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

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following: [RANDOMIZE]

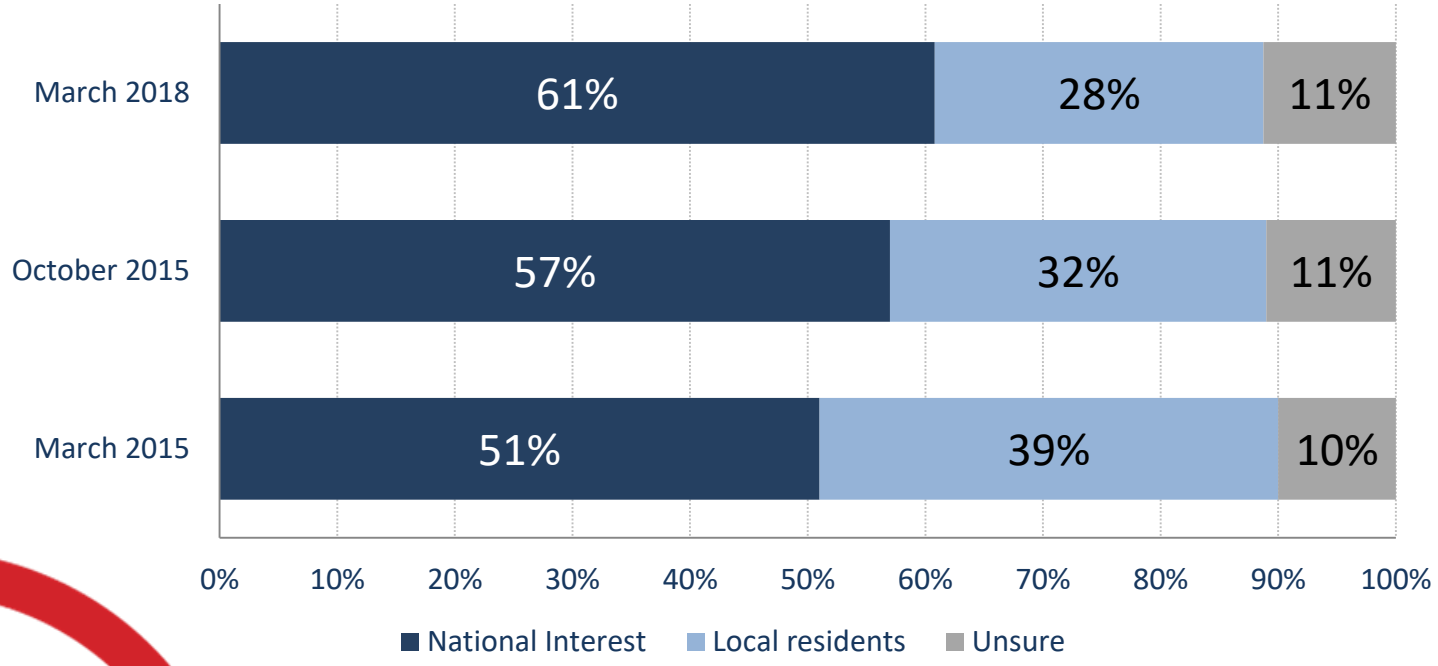
Growth in the renewable energy sector in Canada?

3.0 Trade-offs in energy decision-making



National interest vs local residents

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, October 15th to 16th, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 2nd and 3rd, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



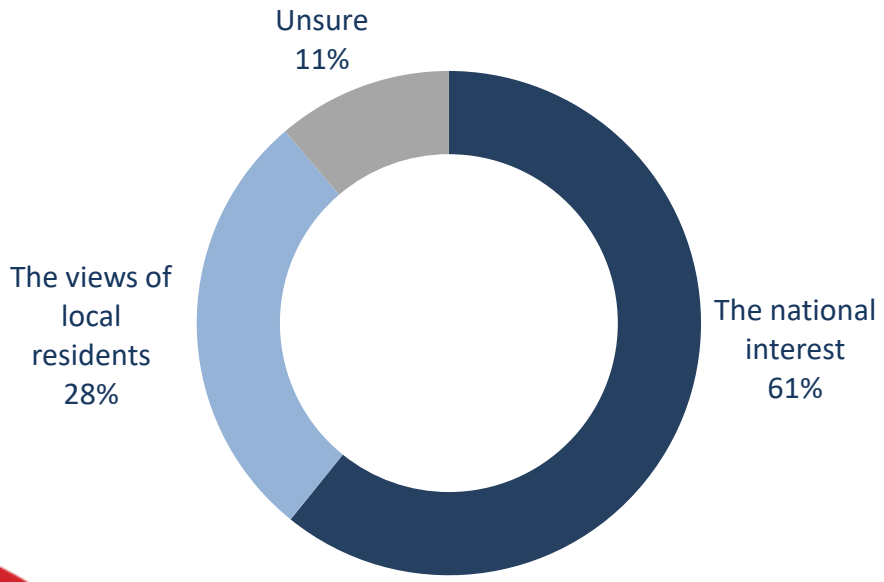
***Note: Charts may not add up to 100 due to rounding**

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

The national interest or the views of local residents?

National interest vs local residents

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



Subgroups	National interest
Atlantic (n=100)	61.1%
Quebec (n=250)	48.5%
Ontario (n=300)	64.8%
Prairies (n=200)	72.2%
British Columbia (n=150)	57.8%
Male (n=518)	69.1%
Female (n=482)	52.8%
18 to 34 (n=185)	49.3%
35 to 54 (n=396)	63.0%
55 plus (n=419)	67.0%

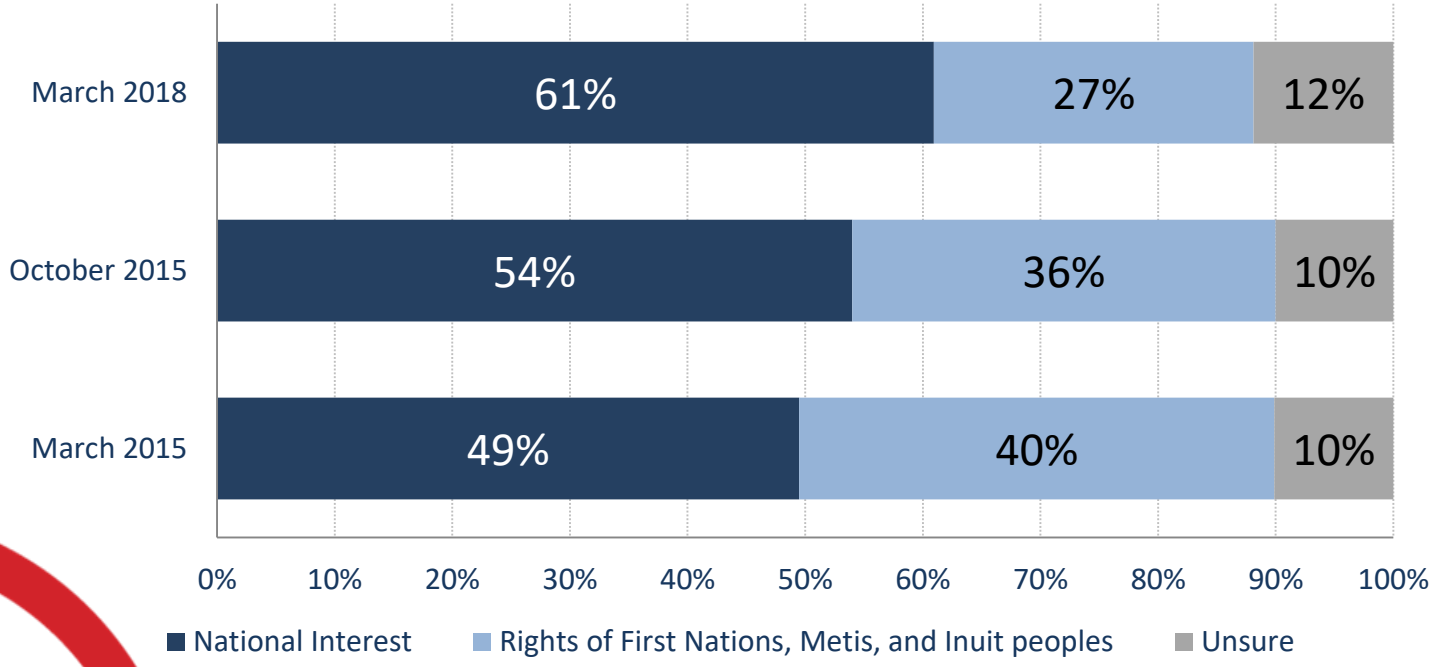
***Note: Charts may not add up to 100 due to rounding**

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

The national interest or the views of local residents?

National interest vs Indigenous peoples

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, October 15th to 16th, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 2nd and 3rd, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



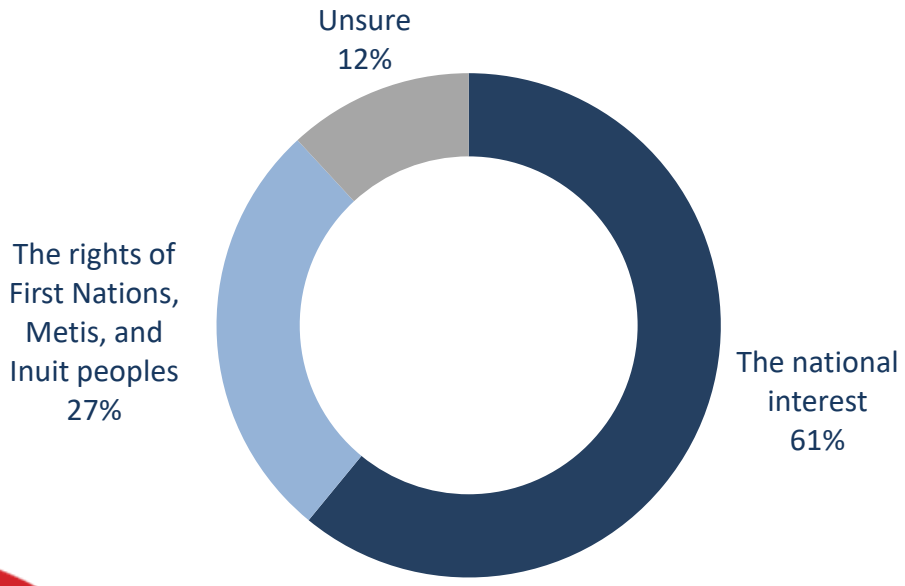
***Note: Charts may not add up to 100 due to rounding**

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

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

National interest vs Indigenous peoples

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



Subgroups	National interest
Atlantic (n=100)	62.0%
Quebec (n=250)	53.8%
Ontario (n=300)	59%
Prairies (n=200)	71.5%
British Columbia (n=150)	61.9%
Male (n=518)	68.8%
Female (n=482)	53.4%
18 to 34 (n=185)	49.4%
35 to 54 (n=396)	60.9%
55 plus (n=419)	69.0%

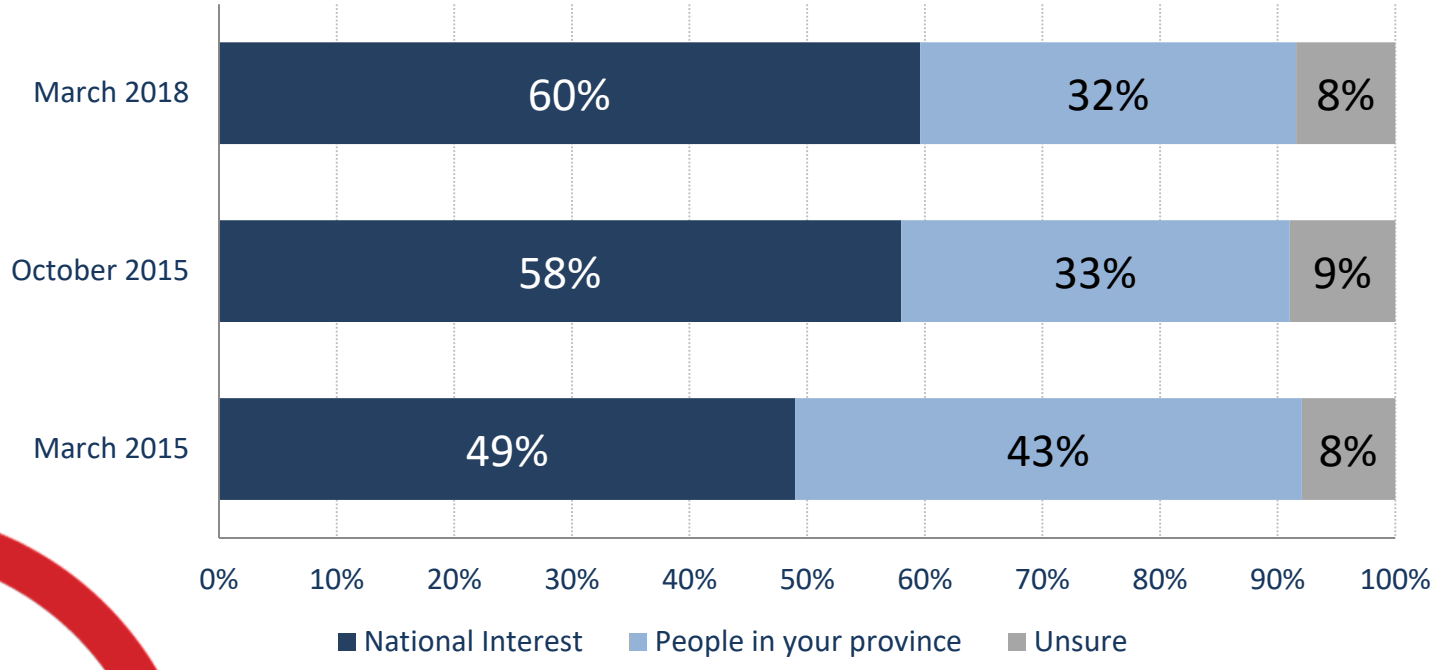
***Note: Charts may not add up to 100 due to rounding**

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

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

National interest vs province

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 3rd, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, October 15th to 16th, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 2nd and 3rd, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



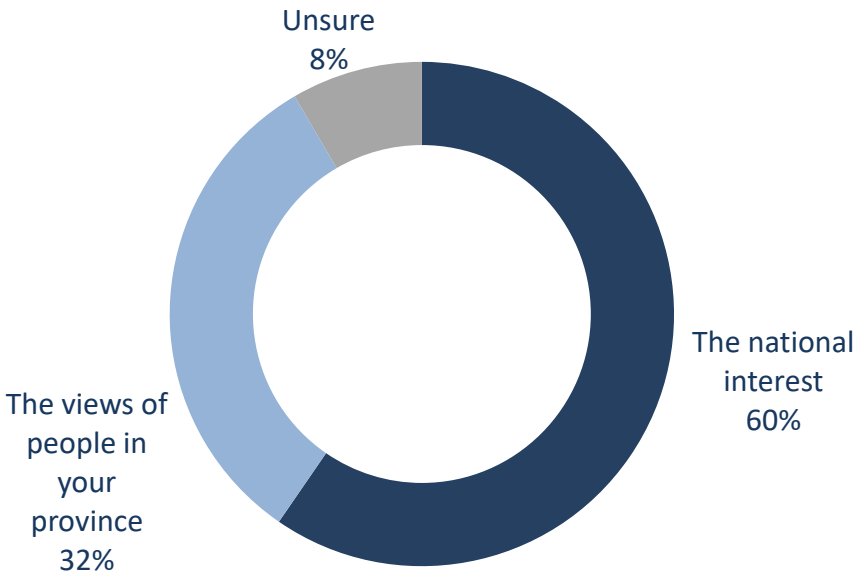
***Note: Charts may not add up to 100 due to rounding**

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

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

National interest vs province

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



Subgroups	National interest
Atlantic (n=100)	62.7%
Quebec (n=250)	43.8%
Ontario (n=300)	68.9%
Prairies (n=200)	67.0%
British Columbia (n=150)	55.3%
Male (n=518)	65.6%
Female (n=482)	53.8%
18 to 34 (n=185)	49.7%
35 to 54 (n=396)	59.3%
55 plus (n=419)	66.8%

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

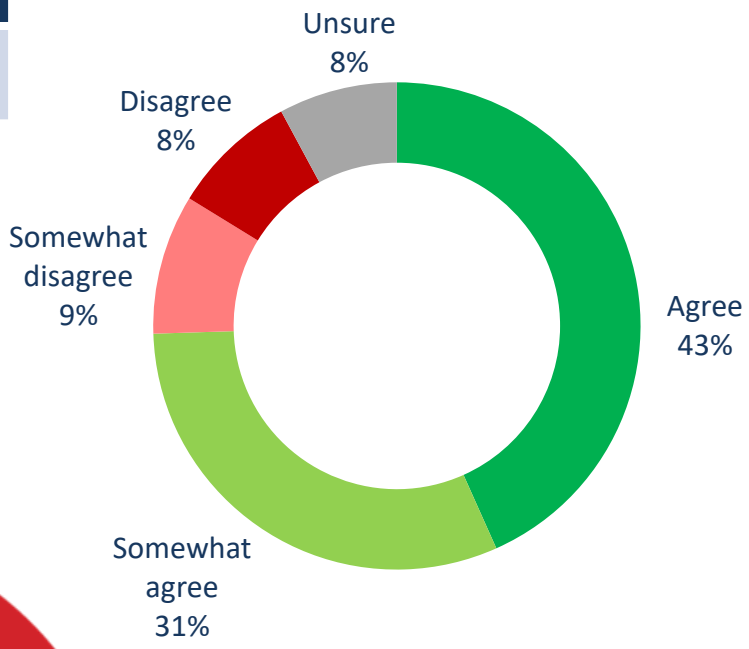
QUESTION – What is more important in a proposed energy project moving forward?

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

Export from domestic oil and gas sector

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

Net Score
+56.8



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

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

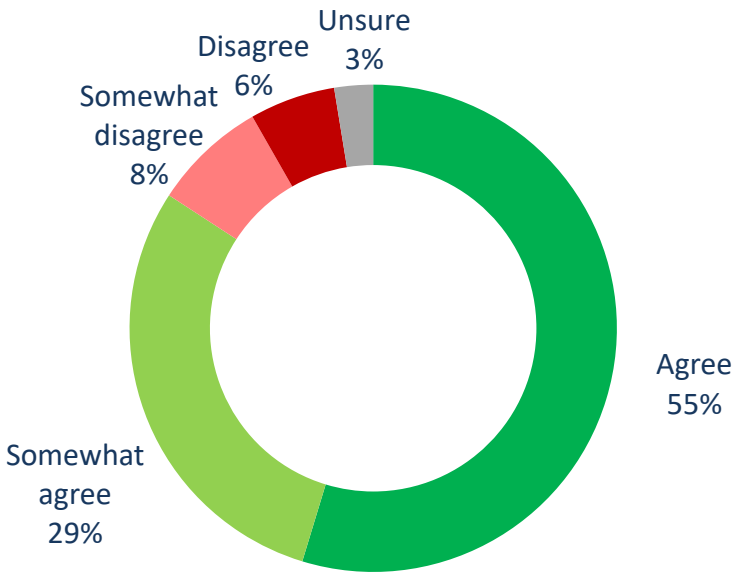
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

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

Environmentally responsible oil and gas sector

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

Net Score
+70.9

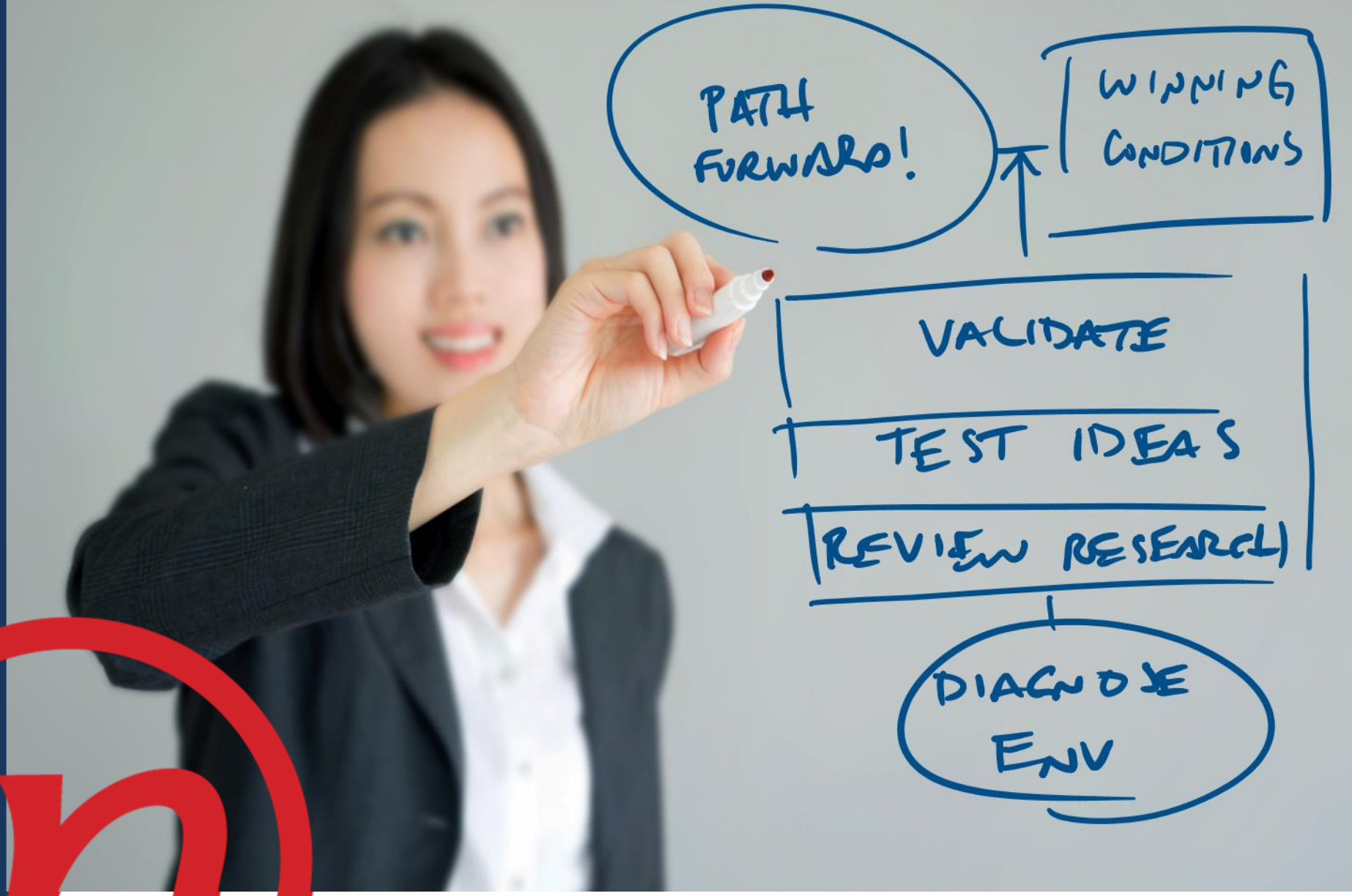


Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	87.9%
Quebec (n=250)	76.2%
Ontario (n=300)	83.5%
Prairies (n=200)	89.6%
British Columbia (n=150)	89.1%
Male (n=518)	86.8%
Female (n=482)	81.7%
18 to 34 (n=185)	76.3%
35 to 54 (n=396)	85.1%
55 plus (n=419)	88.9%

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

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

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



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 March 31st and April 3rd, 2018. This report also contains data from previous Positive Energy commissioned surveys that were conducted between March 2nd and 3rd 2015, October 15th to 16th 2015, and September 23rd to 26th 2017 by Nanos Research. 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 and was conducted by Nanos Research.

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

Please note this is Report 1 of 3. The remaining two reports will be released at a later date.

Technical Note

Element	Description
Organization who commissioned the research	University of Ottawa Positive Energy
Final Sample Size	1000 Randomly selected individuals.
Margin of Error	±3.1 percentage points, 19 times out of 20.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online survey
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.
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.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct
Number of Calls	Maximum of five call backs.
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.
Field Dates	March 31st and April 3rd, 2018.
Language of Survey	The survey was conducted in both English and French.

Element	Description
Weighting of Data	The results were weighted by age and gender using the latest Census information (2016) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
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.
Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines could not participate.
Stratification	By age and gender using the latest Census information (2016) 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.
Estimated Response Rate	12 percent, consistent with industry norms.
Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Question Content	This is Report (1) of (3) . The remaining two reports will be released at a later date.
Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Survey Company	Nanos Research
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.

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.

View our brochure

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