

Majority of participants say energy discourse in Canada has become more polarized in past eighteen months

Positive Energy Panel | Summary

Conducted by Nanos for Positive Energy, October 2019
Submission 2019-1426



uOttawa



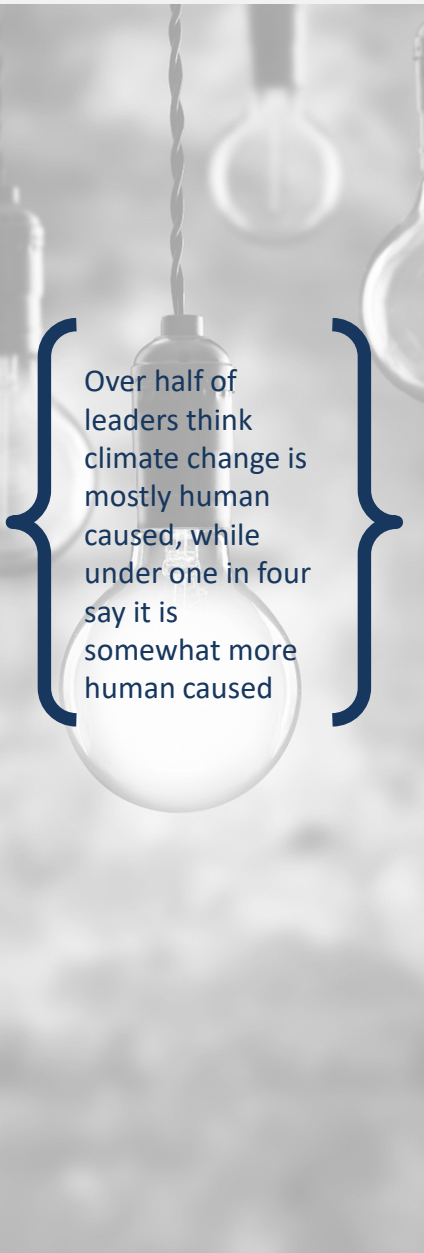
Four years ago, Nanos with Positive Energy at University of Ottawa designed and implemented the Energy and Environmental Leaders Panel, which brings together university experts and key decision-makers from industry, government, Indigenous communities, local communities and environmental organizations to share their thoughts on Canada's energy future in an age of climate change. To follow are the key findings of the third wave of panel research.

Nearly all participants of this study responded that energy discourse in Canada has become more polarized in the past eighteen months. Over eight in ten environment and energy leaders believe climate change is definitely occurring in their personal view. Just under three in five of the leaders think climate change is mostly caused by humans and just under one in four leaders think it is somewhat more human caused.

Over half of leaders strongly agree that the federal government needs to develop a long term energy vision for Canada – even if some provinces don't agree with it. Three in five leaders strongly agreed or agreed that Canada needs to produce more renewable energy, even if it raises the cost of electricity for business and consumers.

Climate Change

- **A majority of leaders believe climate change is definitely occurring in their personal view** – A majority of leaders say they believe climate change is definitely occurring (84%) while just over one in ten believe it is probably occurring (13%). Only two per cent say that climate change is probably not occurring and no one responded that they believe climate change is definitely not occurring. One per cent are unsure.
- **Just under three in five leaders think climate change is mostly human caused** – When asked whether climate change is human caused or due to natural changes, participants responded that they think it is mostly human caused (59%) and somewhat more human caused (23%). While nine per cent think it is about equally caused by humans and natural changes. Four per cent think it is slightly more caused by natural changes and two per cent say it is mostly caused by natural changes. Two per cent are unsure.



Over half of leaders think climate change is mostly human caused, while under one in four say it is somewhat more human caused



Over four out of five leaders at least slightly agree that the federal government needs to develop a long term energy vision for Canada – even if some provinces don't agree with it

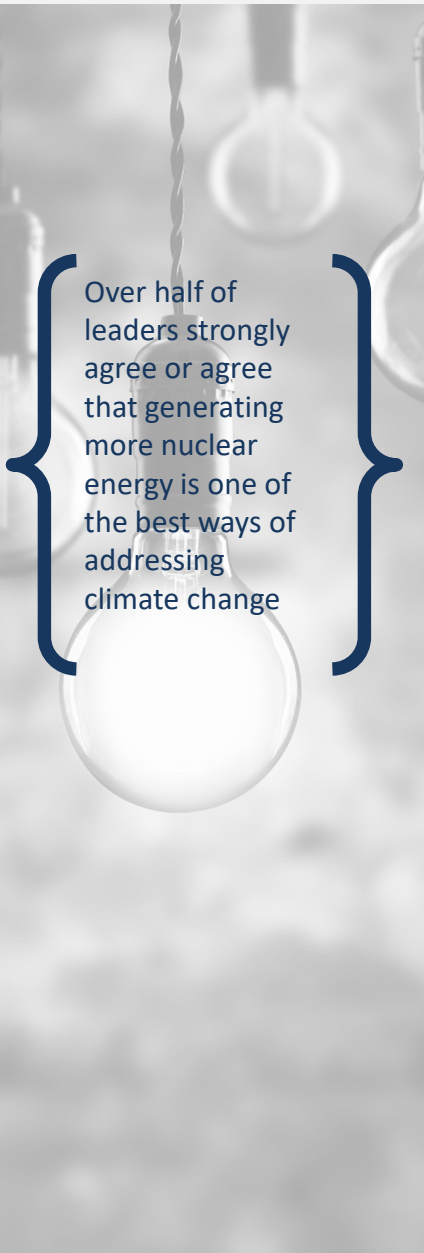
Energy Topics

- **Over three in four leaders at least slightly agree that Canada needs to have a carbon tax that applies across the country** – Almost half of energy and environment leaders (47%) strongly agreed that Canada needs to have a carbon tax that applies across the country, while 19 per cent agreed and 11 per cent slightly agreed. While 12 per cent strongly disagreed, three per cent disagreed, and two per cent slightly disagreed. Ten per cent answered neither agree nor disagree.
- **Over three in five leaders at least slightly disagree that provinces should be able to address climate change in whatever way they see fit** – Twenty-four per cent of participants strongly disagreed, 27 per cent disagreed, and 12 per cent slightly disagreed that provinces should be able to address climate change in whatever way they see fit. While 12 per cent strongly agreed with the statement while 13 per cent agreed and seven per cent slightly agreed. Five per cent neither agreed nor disagreed.
- **Just under three in four leaders at least slightly disagree that the federal government has no role in how energy resources are developed in provinces** – Asked whether the federal government should have a role in provincial energy development, 31 per cent strongly disagreed, 31 per cent disagreed, and 12 per cent slightly disagreed that the federal government has no role in how energy resources are developed in provinces. While 11 per cent strongly agreed with the statement, three per cent agreed and five per cent slightly agreed. Seven per cent neither agreed nor disagreed.
- **A majority of leaders at least slightly agree that the federal government needs to develop a long term energy vision for Canada – even if some provinces don't agree with it** – Over half (52%) strongly agreed with the statement while 20 per cent agreed and 11 per cent slightly agreed that the federal government needs to develop a long term energy vision for Canada – even if some provinces don't agree with it. While three per cent strongly disagreed, four per cent disagreed, and five per cent slightly disagreed. Four per cent neither agreed nor disagreed.
- **Leaders more likely to disagree than agree that the consent of Indigenous peoples is the most important consideration for deciding on energy project approval** – When asked whether or not the consent of Indigenous peoples is the most important consideration for deciding whether or not an energy project should be approved, eight per cent strongly agreed with the statement while 13% agreed and 11 per cent slightly agreed. While 12 per cent strongly disagreed, 21 per cent disagreed, and 16 per cent slightly disagreed. Nineteen per cent neither agreed nor disagreed.




Nearly half of leaders strongly disagree or disagree that Canada is already doing its fair share in addressing climate change.

- **Leaders are eight times as likely to agree than disagree that Canada needs to invest tax dollars into retraining workers who may lose their jobs as the country addresses climate change** – Eight in ten strongly agreed (38%), agreed (31%) or slightly agreed (12%) that Canada needs to invest tax dollars into retraining workers who may lose their jobs as the country addresses climate change. Four per cent strongly disagreed, three per cent disagreed, and three per cent slightly disagreed. Eight per cent neither agreed nor disagreed.
- **Just over half of leaders at least slightly agreed that phasing out oil and gas production is unfair to people in provinces that produce it** – Nineteen per cent strongly agreed, while 22 per cent agreed and 11 per cent slightly agreed that phasing out oil and gas production is unfair to people in provinces that produce it; while 13 per cent strongly disagreed, 12 per cent disagreed, and 11 per cent slightly disagreed. Ten per cent said they neither agree nor disagree.
- **Leaders are split on whether phasing out oil and gas production and consumption is unnecessary because new technologies will dramatically reduce emissions from oil and gas** – Seventeen per cent strongly disagreed, 26 per cent disagreed, and six per cent slightly disagreed that phasing out oil and gas production and consumption is unnecessary because new technologies will dramatically reduce emissions from oil and gas. Five per cent strongly agreed with the statement while 22 per cent agreed and 15 per cent slightly agreed. Eight per cent neither agreed nor disagreed.
- **More leaders agree rather than disagree that it's impossible to power an advanced economy like Canada's using only renewable energy** – Twenty-nine per cent strongly agreed that it's impossible to power an advanced economy like Canada's using only renewable energy (e.g. hydro, wind and solar), while 19 per cent agreed and nine per cent slightly agreed. Ten per cent strongly disagreed, 13 per cent disagreed, and 11 per cent slightly disagreed. Eight per cent answered neither.
- **Three in five leaders at least slightly disagree that local communities should have the final say when deciding whether energy infrastructure projects should go ahead** – When asked if local communities should have the final say when deciding whether energy infrastructure projects (oil, gas, hydro, solar) that affect them should go ahead, 18 per cent strongly disagreed, 26 per cent disagreed, and 16 per cent slightly disagreed. Seven per cent strongly agreed with the statement while 16 per cent agreed and seven per cent slightly agreed. Nine per cent neither agreed nor disagreed.



Over half of leaders strongly agree or agree that generating more nuclear energy is one of the best ways of addressing climate change

- **Twice as many leaders disagree rather than agree that Canada is already doing its fair share in addressing climate change** – When asked if Canada is already doing its fair share in addressing climate change, 22 per cent strongly disagreed, 26 per cent disagreed, and 17 per cent slightly disagreed. Five per cent strongly agreed with the statement, 15 per cent agreed and 10 per cent slightly agreed. Five per cent said they neither agree nor disagree.
- **Over half of leaders at least slightly agree that Canada can continue to develop fossil fuels such as oil sands in Alberta and still meet its climate commitments** – Thirteen per cent strongly agreed, while 28 per cent agreed and 16 per cent slightly agreed that Canada can continue to develop fossil fuels such as oil sands in Alberta and still meet its climate commitments. One in five (20%) strongly disagreed, 11 per cent disagreed, and six per cent slightly disagreed. Six per cent neither agreed nor disagreed.
- **Just under seven in ten leaders at least slightly agree that generating more nuclear energy is one of the best ways of addressing climate change** – When asked if generating more nuclear energy is one of the best ways of addressing climate change, 27 per cent strongly agreed with the statement while 25 per cent agreed and 17 per cent slightly agreed. Nine per cent strongly disagreed, 12 per cent disagreed, and five per cent slightly disagreed. Five per cent neither agreed nor disagreed.
- **Over three in five leaders strongly agree or agree that Canada needs to produce more renewable energy, even if it raises the cost of electricity for business and consumers** – When asked whether Canada needs to produce more renewable energy, even if it raises the cost of electricity for business and consumers, 31 per cent strongly agreed, 29 per cent agreed and 11 per cent slightly agreed. Seven per cent strongly disagreed, 10 per cent disagreed, and three per cent slightly disagreed. Eight per cent neither agreed nor disagreed.
- **Over three in five leaders at least slightly agree that the economic benefits of building new pipelines in Canada outweigh the risks from potential spills, tanker traffic and climate change** – When asked if the economic benefits of building new pipelines in Canada outweigh the risks from potential spills, tanker traffic and climate change, 29 per cent strongly agreed with the statement while 22 per cent agreed and 11 per cent slightly agreed. Fourteen per cent strongly disagreed, nine per cent disagreed, and eight per cent slightly disagreed. Six per cent neither agreed nor disagreed.



Nearly a third of leaders strongly agree that Canada should expand oil and gas production if it can produce its oil and gas with lower emissions than other countries.

- **Three in five leaders at least slightly disagree that building new pipelines is incompatible with Canada's international obligations to reduce carbon emissions.** – Twenty-six per cent strongly disagreed and disagreed, respectively, and eight per cent slightly disagreed that building new pipelines is incompatible with Canada's international obligations to reduce carbon emissions. While 17 per cent strongly agreed with the statement, nine per cent agreed and five per cent slightly agreed. Nine per cent neither agreed nor disagreed.
- **Almost twice as many agree rather than disagree that Canada should expand production of oil and gas for export** – Twenty per cent strongly agreed, 18 per cent agreed and 22 per cent slightly agreed that since global demand for oil and gas is rising, Canada should expand production of oil and gas for export . Seventeen per cent strongly disagreed, nine per cent disagreed, and six per cent slightly disagreed. Six per cent neither agreed nor disagreed.
- **Just under seven in ten leaders at least slightly agree that Canada should expand oil and gas production if it can produce its oil and gas with lower emissions than other countries** – When asked whether Canada should expand oil and gas production if it can produce its oil and gas with lower emissions than other countries, 31 per cent strongly agreed, while 24 per cent agreed and 14 per cent slightly agreed. Eight per cent strongly disagreed, eight per cent disagreed, and nine per cent slightly disagreed. Six per cent answered neither.
- **Over half of leaders at least slightly agree that exporting Canadian natural gas to countries that use more polluting energy like coal is one of the most important things Canada can do to address climate change** – Twenty-three per cent strongly agreed, 21 per cent agreed and 15 per cent slightly agreed that exporting Canadian natural gas to countries that use more polluting energy like coal is one of the most important things Canada can do to address climate change. Nine per cent strongly disagreed, 16 per cent disagreed, and eight per cent slightly disagreed. Seven per cent answered neither.

Climate Change Leadership

- **Over nine in ten leaders say that energy discourse in Canada has become more polarized in the past eighteen months** – Ninety-two per cent of respondents said that energy discourse has become more polarized in the last eighteen months, followed by no at three per cent and five per cent are unsure.
- **A political talking point was the most frequently mentioned reason for polarization** – Nearly two in five (39%) of leaders answered that a political talking point was the reason for increased polarization, followed by both sides being entrenched (11%), lack of strategy/leadership (9%), and provincial differences (9%).
- **Peter Tertzakian most frequently mentioned as a leader when it comes to energy issues and policy in Canada** – When asked, participants answered Peter Tertzakian most frequently (six per cent) as a leader for energy issues and policy in Canada, followed by Mark Jaccard and Monica Gattinger, each at four per cent.
- **Elizabeth May most frequently mentioned as one of the top five thought leaders when it comes to environmental issues and policy in Canada** – When asked, participants answered Elizabeth May most frequently (eight per cent) as a leader for environmental issues and policy in Canada, followed by Catherine McKenna (six per cent) and David Suzuki (five per cent).

These observations are based on an online outreach to 100 environmental and energy leaders September 11th and October 4th, 2019. For the distribution of panel members, please see the technical note. Readers should note that the research is representative of the participants and should not be projected to any population, leaders or general. No margin of error applies to this research.

This study was commissioned by the University of Ottawa and the research was conducted by Nanos Research.

Net Scores

The federal government needs to develop a long term energy vision for Canada – even if some provinces don't agree with it

71

Canada needs to invest tax dollars into retraining workers who may lose their jobs as the country addresses climate change

71

Canada needs to have a carbon tax that applies across the country

56

The federal government has no role in how energy resources are developed in provinces

-54

Canada needs to produce more renewable energy, even if it raises the cost of electricity for business and consumers

51

Canada should expand oil and gas production if it can produce its oil and gas with lower emissions than other countries

43

Generating more nuclear energy is one of the best ways of addressing climate change

43

***Tier 1
Statements with
the highest
intensity of
consensus
among leaders***

Net
Scores

Canada is already doing its fair share in addressing climate change

The economic benefits of building new pipelines in Canada outweigh the risks from potential spills, tanker traffic and climate change

Local communities should have the final say when deciding whether energy infrastructure projects (oil, gas, hydro, solar) that affect them should go ahead

Provinces should be able to address climate change in whatever way they see fit

Since global demand for oil and gas is rising, Canada should expand production of oil and gas for export

-35

31

-30

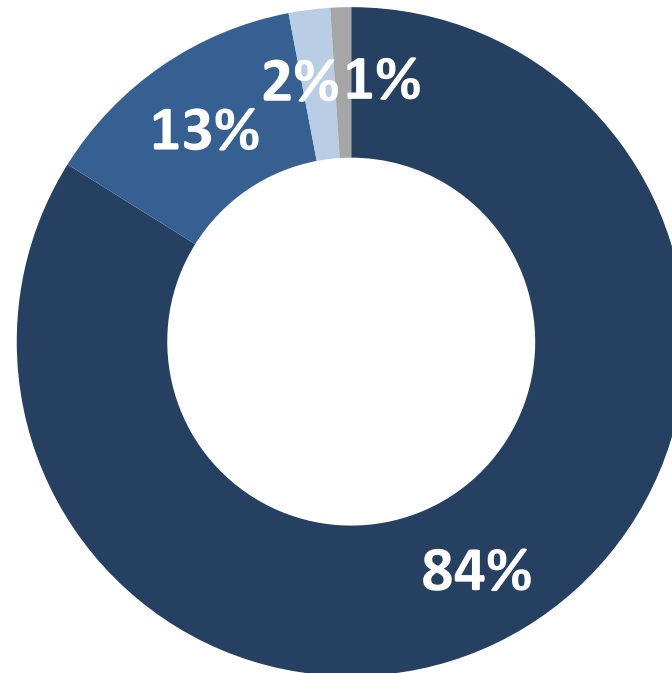
-30

29

Tier 2

***Statements with
a strong
intensity of
consensus
among leaders***

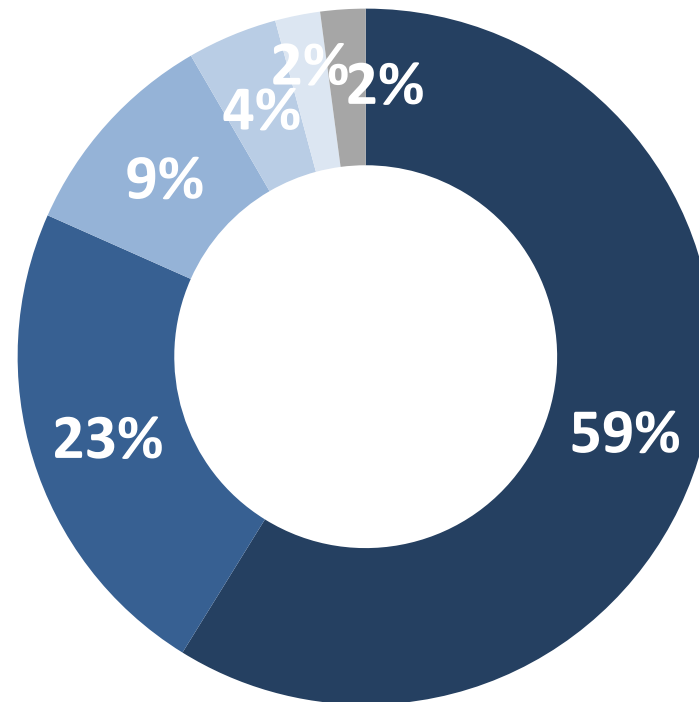
	Net Scores
Building new pipelines is incompatible with Canada's international obligations to reduce carbon emissions	-29
Exporting Canadian natural gas to countries that use more polluting energy like coal is one of the most important things Canada can do to address climate change	26
It's impossible to power an advanced economy like Canada's using only renewable energy (e.g. hydro, wind and solar)	22
Canada can continue to develop fossil fuels such as oil sands in Alberta and still meet its climate commitments	19
The consent of Indigenous peoples is the most important consideration for deciding whether or not an energy project should be approved	-17
Phasing out oil and gas production is unfair to people in provinces that produce it	16
Phasing out oil and gas production and consumption is unnecessary because new technologies will dramatically reduce emissions from oil and gas	-6



- Climate change is definitely occurring
- Climate change is probably occurring
- Climate change is probably not occurring
- Climate change is definitely not occurring
- Unsure

*Charts may not add up to 100 due to rounding.

QUESTION – Thinking about your own personal view, do you believe that...



- Mostly human-caused
- Somewhat more human-caused
- About equally caused by human and natural changes
- Somewhat more caused by natural changes
- Mostly caused by natural changes
- Not sure

*Charts may not add up to 100 due to rounding.

QUESTION – Do you think climate change is...

First tier of polarization on energy topics



“ Greater consensus among leaders on the need for national leadership and a national plan to address climate change and related economic issues.

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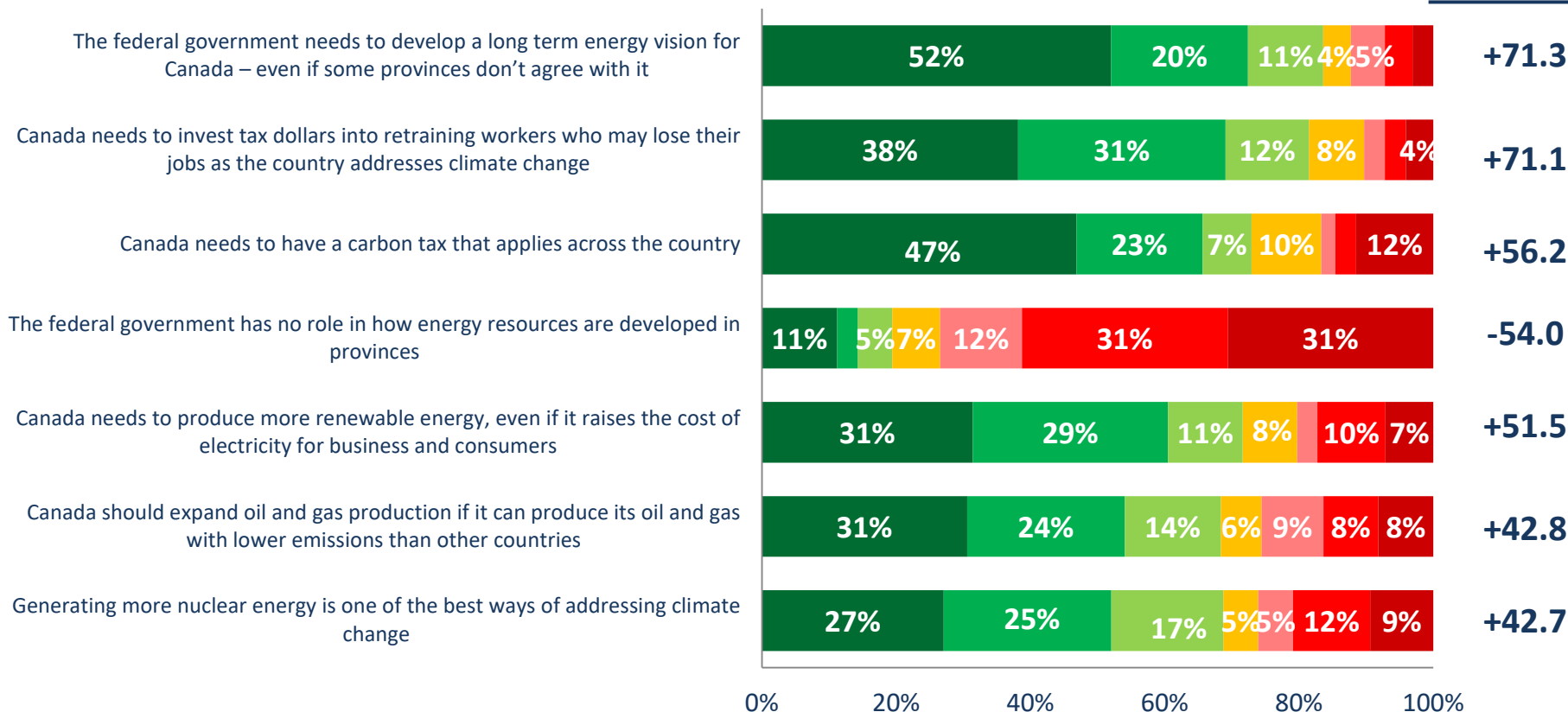
Tier 1 Sentiment for energy topics



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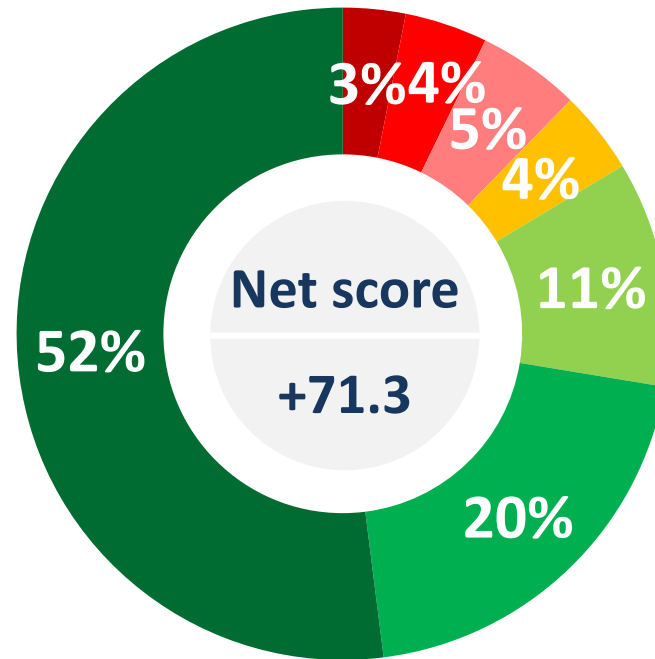
Net score



■ Strongly agree
 ■ Agree
 ■ Slightly agree
 ■ Neither
 ■ Slightly disagree
 ■ Disagree
 ■ Strongly disagree

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]



■ Strongly Disagree ■ Disagree ■ Slightly disagree
■ Neither ■ Slightly agree ■ Agree
■ Strongly agree

*Charts may not add up to 100 due to rounding.

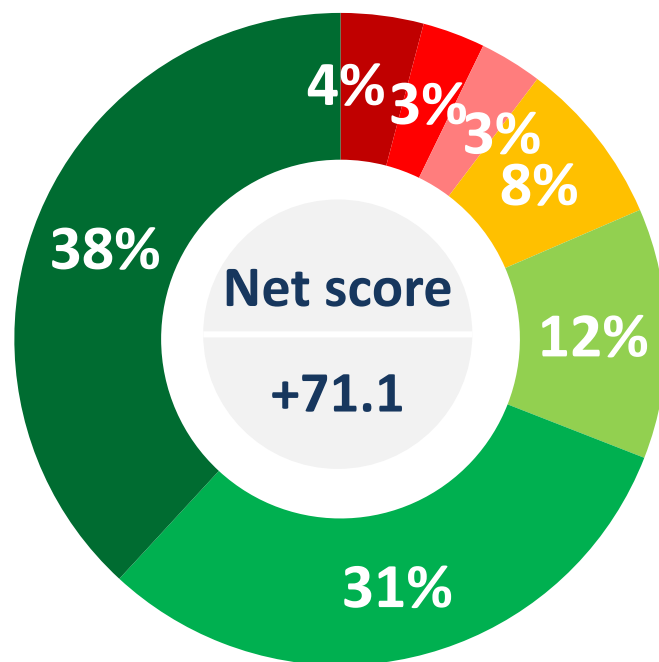
QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

The federal government needs to develop a long term energy vision for Canada – even if some provinces don't agree with it.

Investing tax dollars into retraining workers



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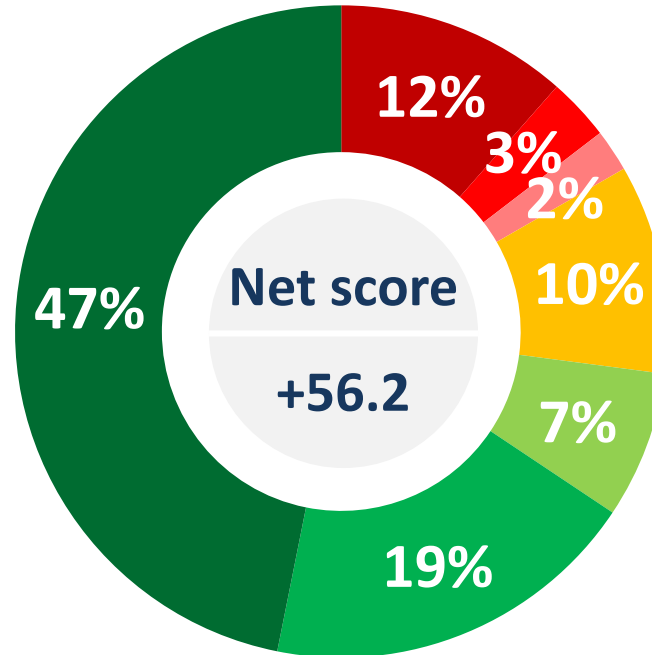
- Strongly Disagree
- Disagree
- Slightly disagree
- Neither
- Slightly agree
- Agree
- Strongly agree

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Canada needs to invest tax dollars into retraining workers who may lose their jobs as the country addresses climate change

Source: Nanos Research, online survey, September 11th to October 4th, 2019, n=100.



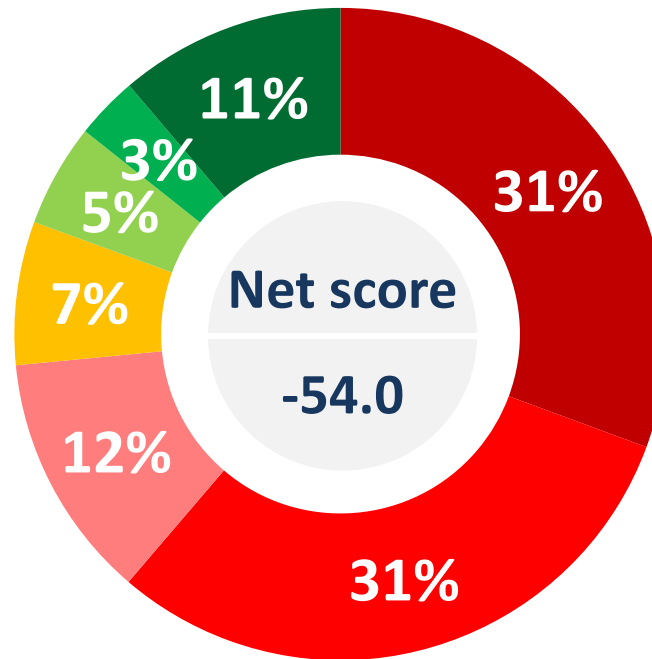
- Strongly Disagree
- Disagree
- Slightly disagree
- Neither
- Slightly agree
- Agree
- Strongly agree

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Canada needs to have a carbon tax that applies across the country.

Role of federal government in provincial energy development



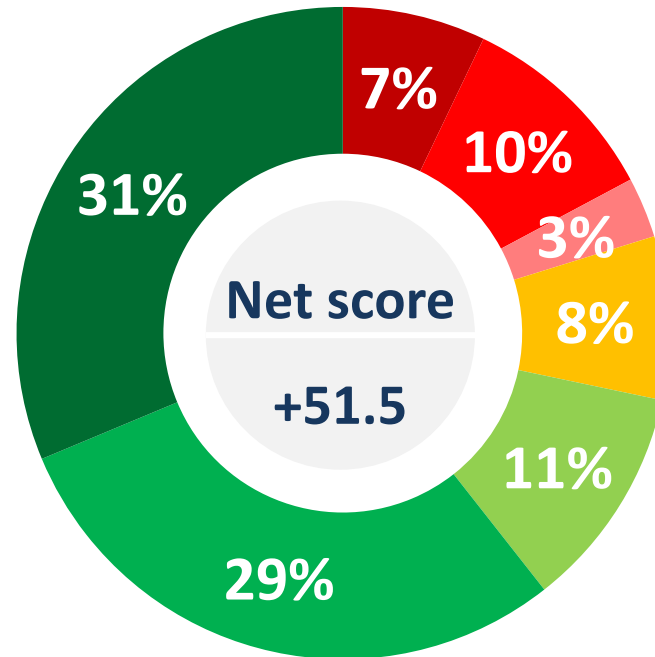
Strongly Disagree Disagree Slightly disagree
Neither Slightly agree Agree
Strongly agree

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

The federal government has no role in how energy resources are developed in provinces

Canada's need to produce more renewable energy



■ Strongly Disagree ■ Disagree ■ Slightly disagree
■ Neither ■ Slightly agree ■ Agree
■ Strongly agree

*Charts may not add up to 100 due to rounding.

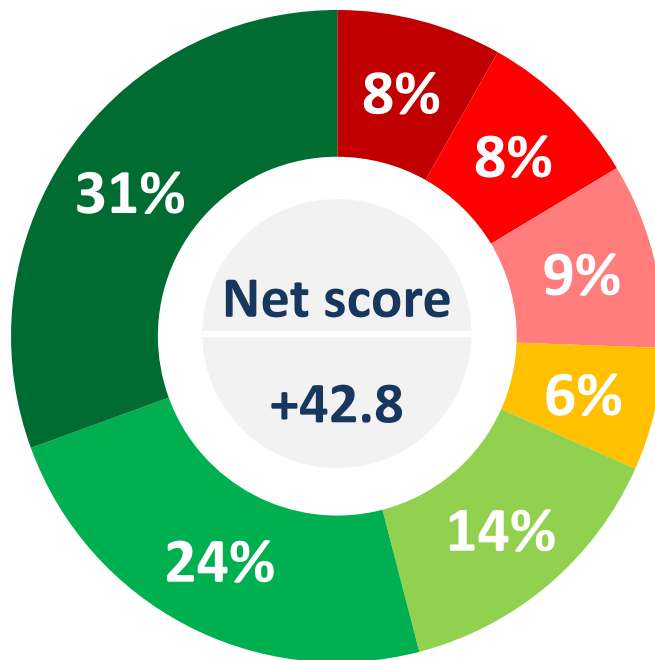
QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Canada needs to produce more renewable energy, even if it raises the cost of electricity for business and consumers

Expanding oil and gas if Canadian emissions are lower than other countries



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Strongly Disagree

Disagree

Slightly disagree

Neither

Slightly agree

Agree

Strongly agree

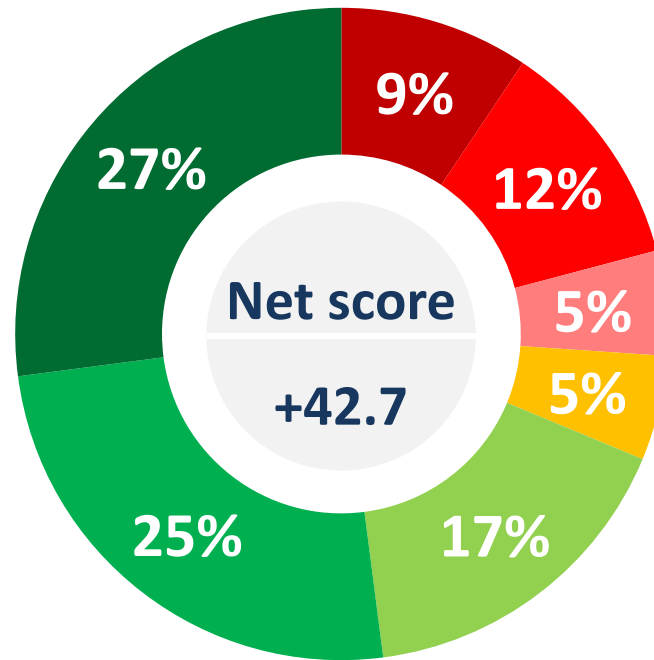
*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Canada should expand oil and gas production if it can produce its oil and gas with lower emissions than other countries

Source: Nanos Research, online survey, September 11th to October 4th, 2019, n=100.

Nuclear energy as a means to address climate change



■ Strongly Disagree ■ Disagree ■ Slightly disagree
■ Neither ■ Slightly agree ■ Agree
■ Strongly agree

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Generating more nuclear energy is one of the best ways of addressing climate change

Source: Nanos Research, online survey, September 11th to October 4th, 2019, n=100.

Second tier of polarization on energy topics

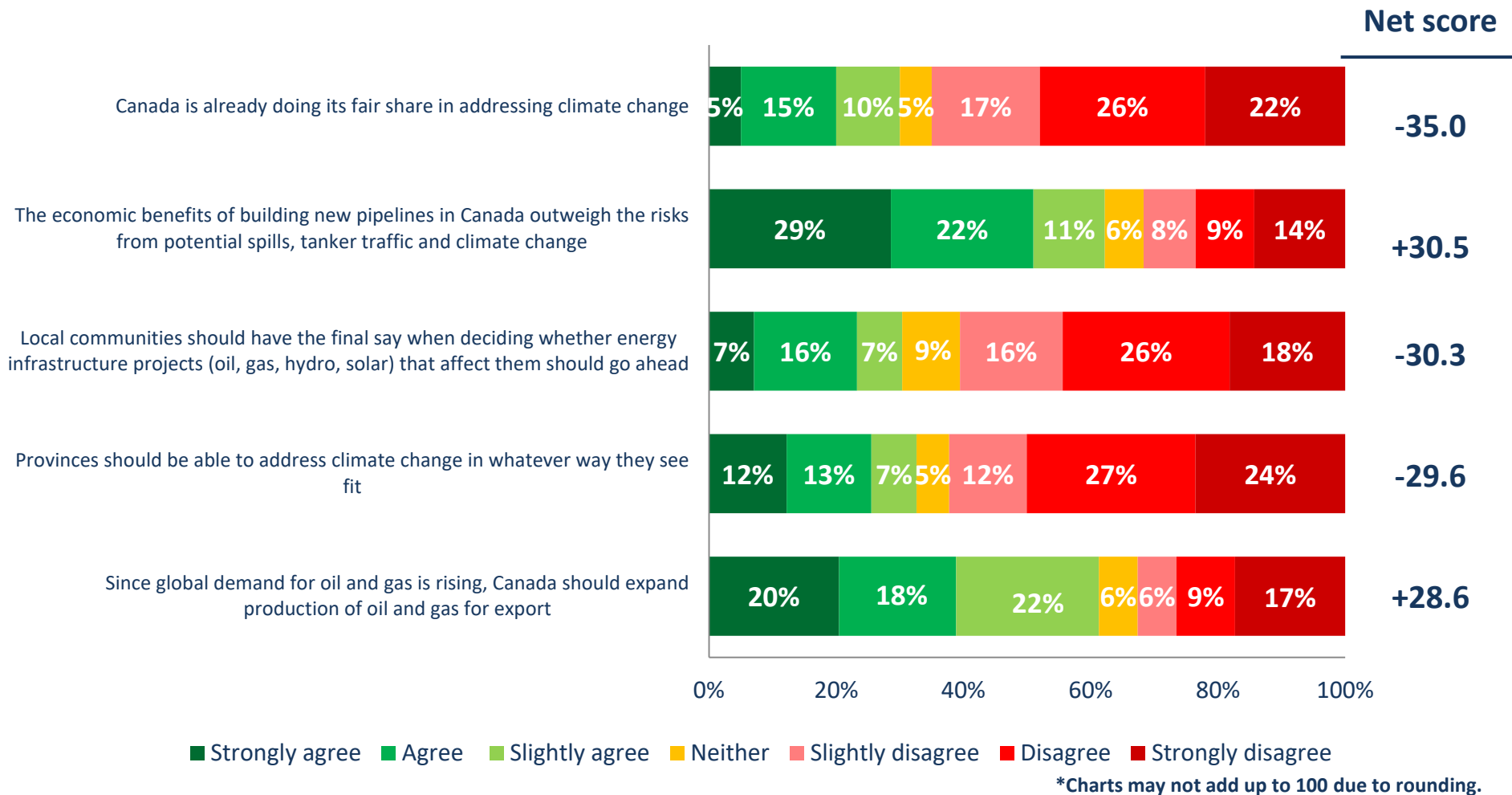


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Strong intensity of consensus that local and provincial interests should not have final say in energy decision making.

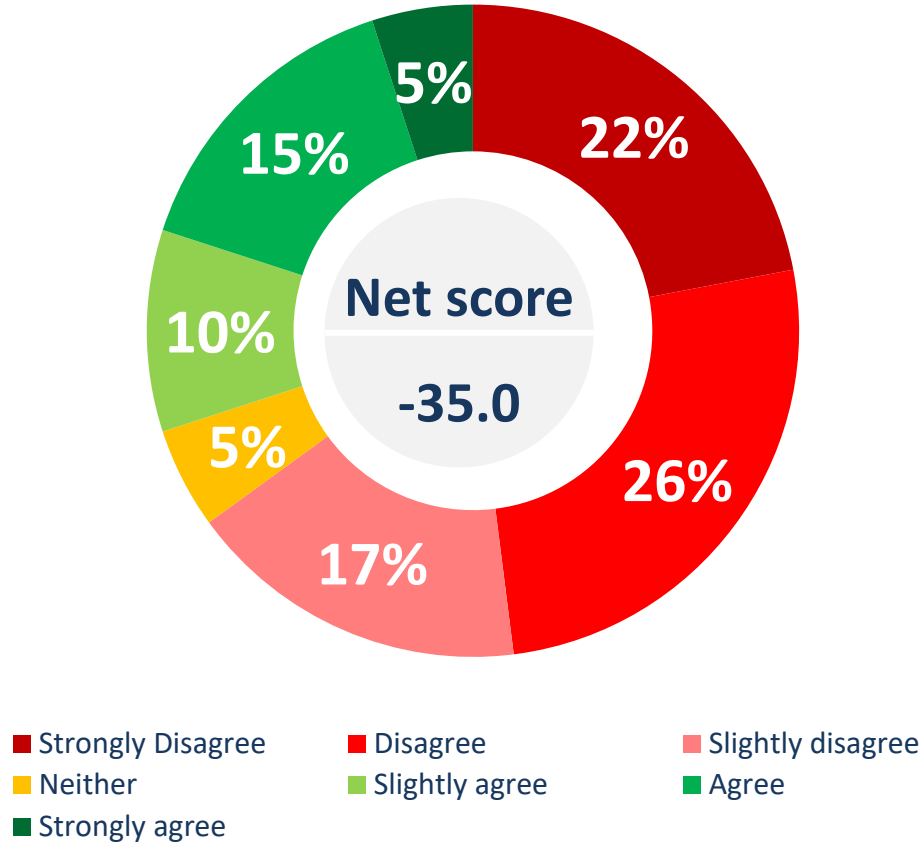
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Tier 2 Sentiment for energy topics



QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

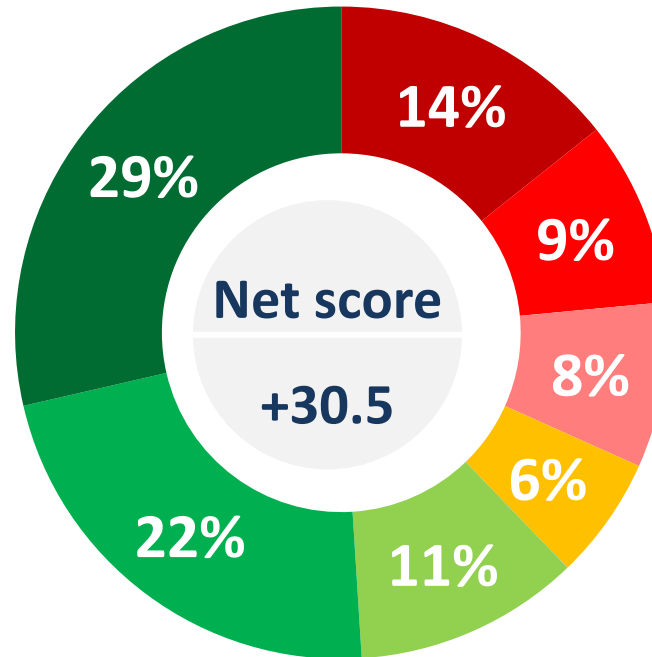
Fair share in addressing climate change



*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Canada is already doing its fair share in addressing climate change



■ Strongly Disagree

■ Disagree

■ Slightly disagree

■ Neither

■ Slightly agree

■ Agree

■ Strongly agree

*Charts may not add up to 100 due to rounding.

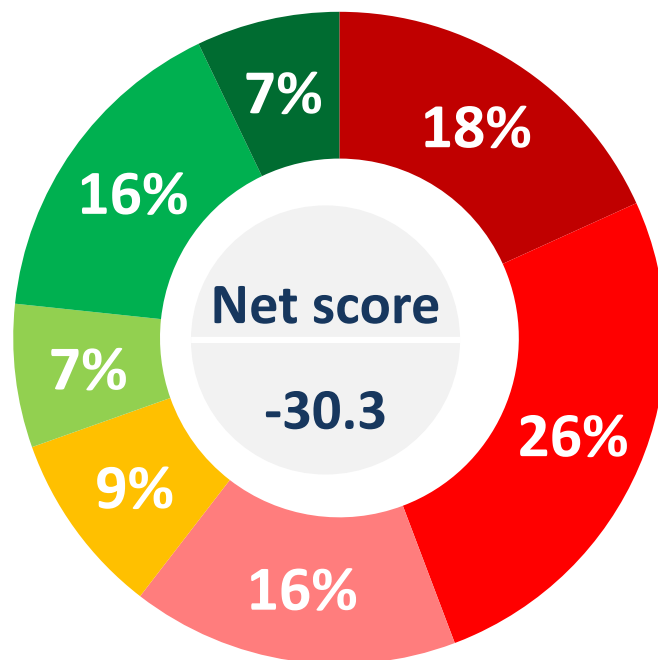
QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

The economic benefits of building new pipelines in Canada outweigh the risks from potential spills, tanker traffic and climate change

Local community input on projects that affect them



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Strongly Disagree

Disagree

Slightly disagree

Neither

Slightly agree

Agree

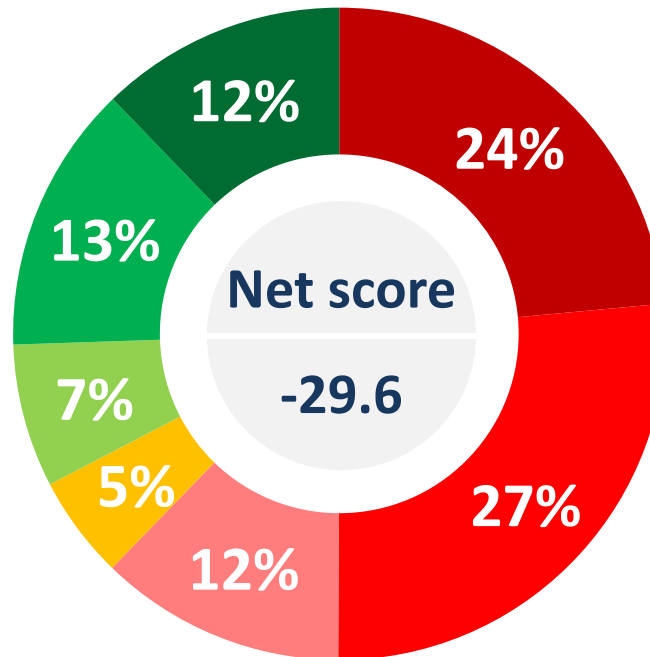
Strongly agree

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Local communities should have the final say when deciding whether energy infrastructure projects (oil, gas, hydro, solar) that affect them should go ahead

Provinces should address climate change how they choose



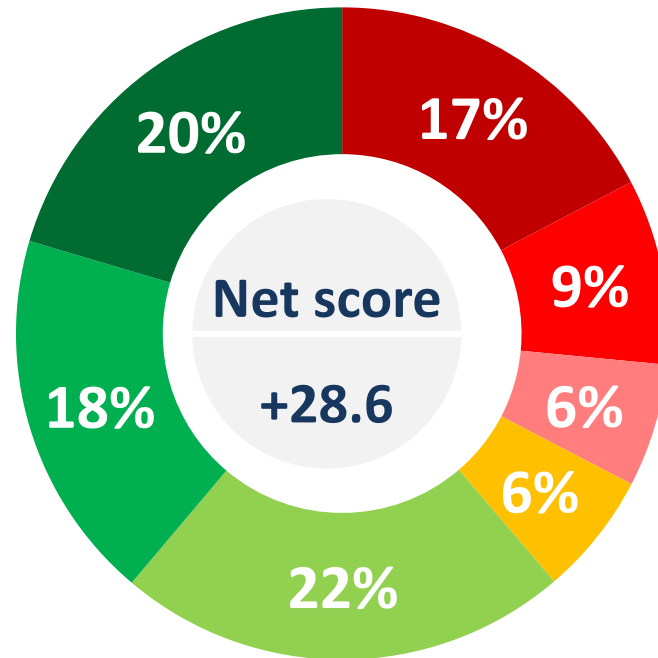
- Strongly Disagree
- Disagree
- Slightly disagree
- Neither
- Slightly agree
- Agree
- Strongly agree

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Provinces should be able to address climate change in whatever way they see fit.

Canada expanding oil and gas production depending on demand



■ Strongly Disagree

■ Disagree

■ Slightly disagree

■ Neither

■ Slightly agree

■ Agree

■ Strongly agree

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Since global demand for oil and gas is rising, Canada should expand production of oil and gas for export

Source: Nanos Research, online survey, September 11th to October 4th, 2019, n=100.

Third tier of polarization on energy topics



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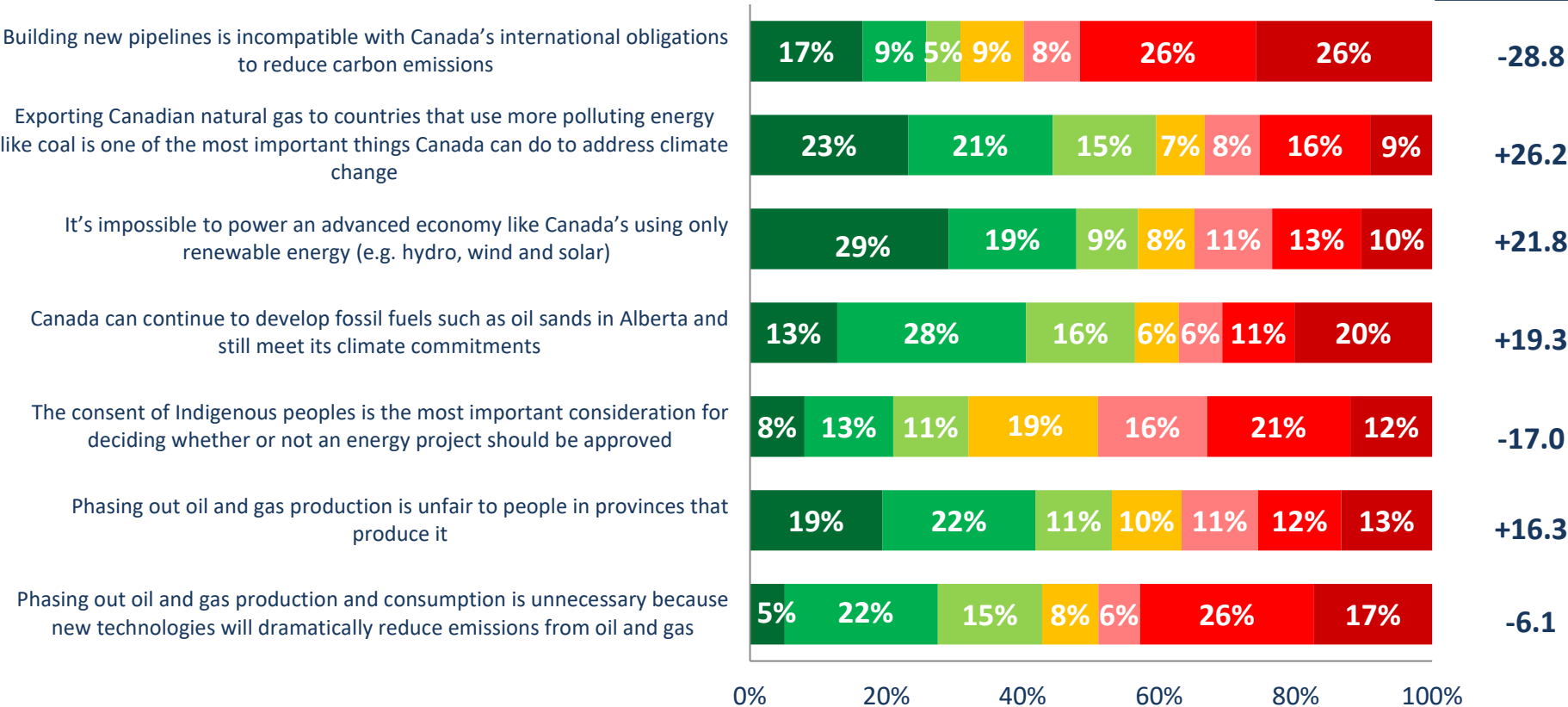
A background image showing several hands of different skin tones cupping a small green seedling growing out of a mound of dark soil. The image is slightly faded to serve as a background for the text.

“ Although net scores indicate potential emerging consensus, polarization is greater around issues that involve economic and energy price trade-offs.

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Tier 3 Sentiment for energy topics

Net score

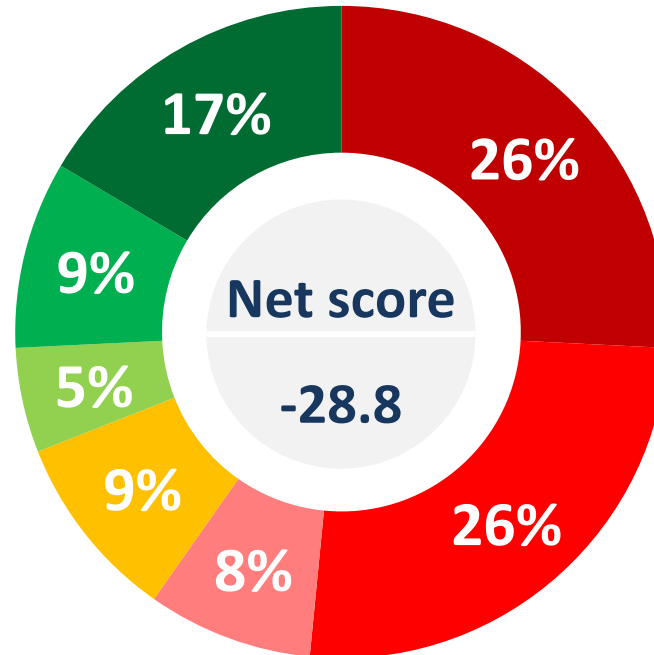


■ Strongly agree
 ■ Agree
 ■ Slightly agree
 ■ Neither
 ■ Slightly disagree
 ■ Disagree
 ■ Strongly disagree

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Compatibility of pipelines with Canada's international obligations



■ Strongly Disagree ■ Disagree ■ Slightly disagree
■ Neither ■ Slightly agree ■ Agree
■ Strongly agree

*Charts may not add up to 100 due to rounding.

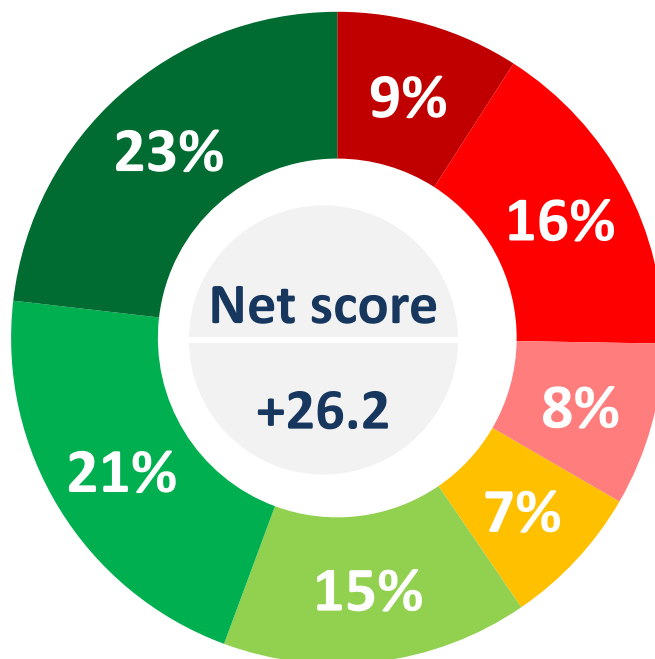
QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Building new pipelines is incompatible with Canada's international obligations to reduce carbon emissions

Importance of exporting gas to countries that use coal



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■ Strongly Disagree

■ Disagree

■ Slightly disagree

■ Neither

■ Slightly agree

■ Agree

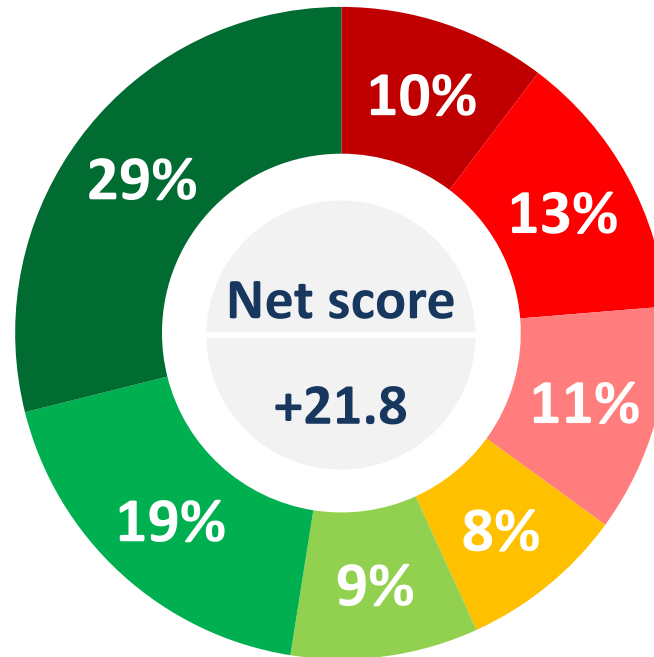
■ Strongly agree

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Exporting Canadian natural gas to countries that use more polluting energy like coal is one of the most important things Canada can do to address climate change

Possibility of powering the economy using only renewables



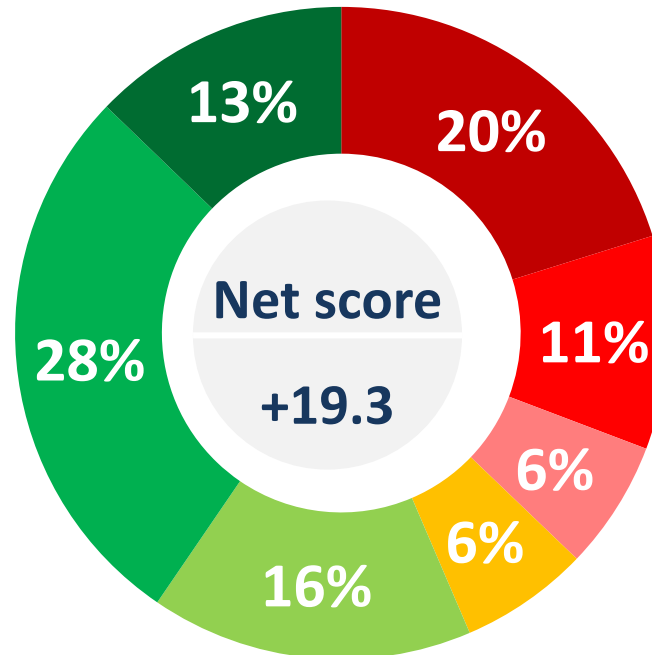
■ Strongly Disagree ■ Disagree ■ Slightly disagree
■ Neither ■ Slightly agree ■ Agree
■ Strongly agree

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

It's impossible to power an advanced economy like Canada's using only renewable energy (e.g. hydro, wind and solar)

Canada's ability to meet climate commitments and develop oil



■ Strongly Disagree ■ Disagree ■ Slightly disagree
■ Neither ■ Slightly agree ■ Agree
■ Strongly agree

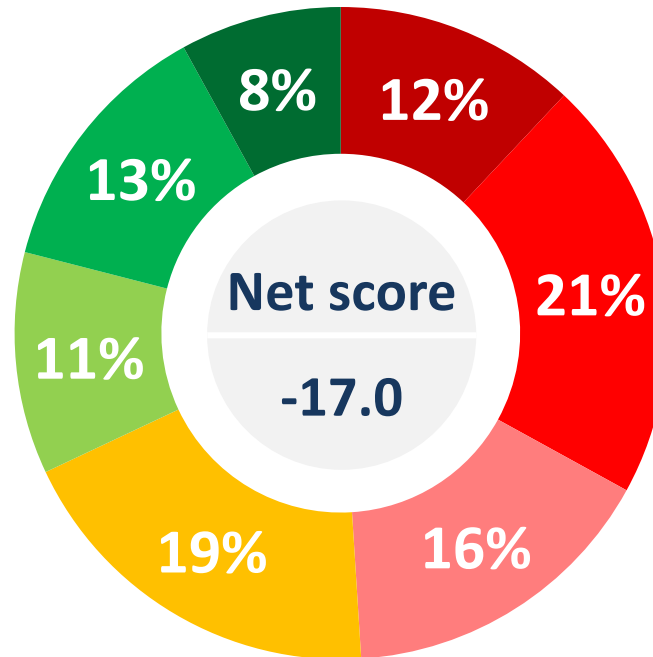
*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Canada can continue to develop fossil fuels such as oil sands in Alberta and still meet its climate commitments

Source: Nanos Research, online survey, September 11th to October 4th, 2019, n=100.

Consent of Indigenous People's for energy projects



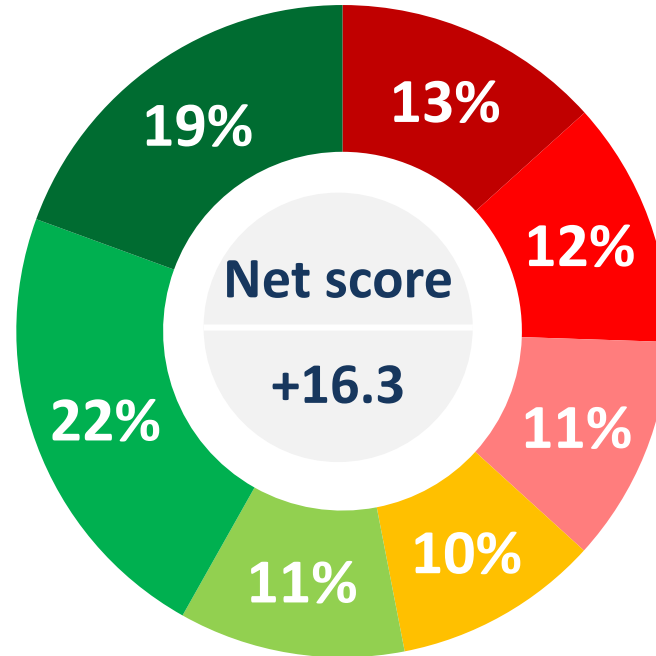
■ Strongly Disagree ■ Disagree ■ Slightly disagree
■ Neither ■ Slightly agree ■ Agree
■ Strongly agree

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

The consent of Indigenous peoples is the most important consideration for deciding whether or not an energy project should be approved.

Fairness of phasing out oil and gas production



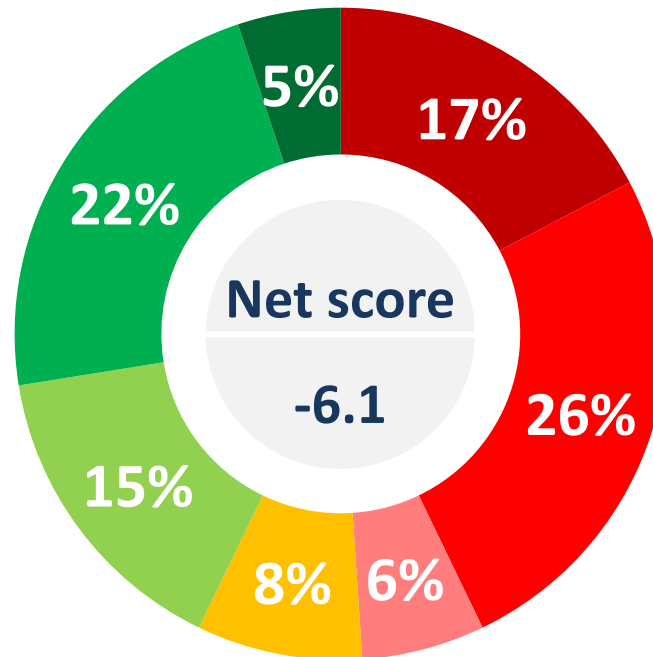
■ Strongly Disagree ■ Disagree ■ Slightly disagree
■ Neither ■ Slightly agree
■ Strongly agree ■ Unsure

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Phasing out oil and gas production is unfair to people in provinces that produce it

Source: Nanos Research, online survey, September 11th to October 4th, 2019, n=100.

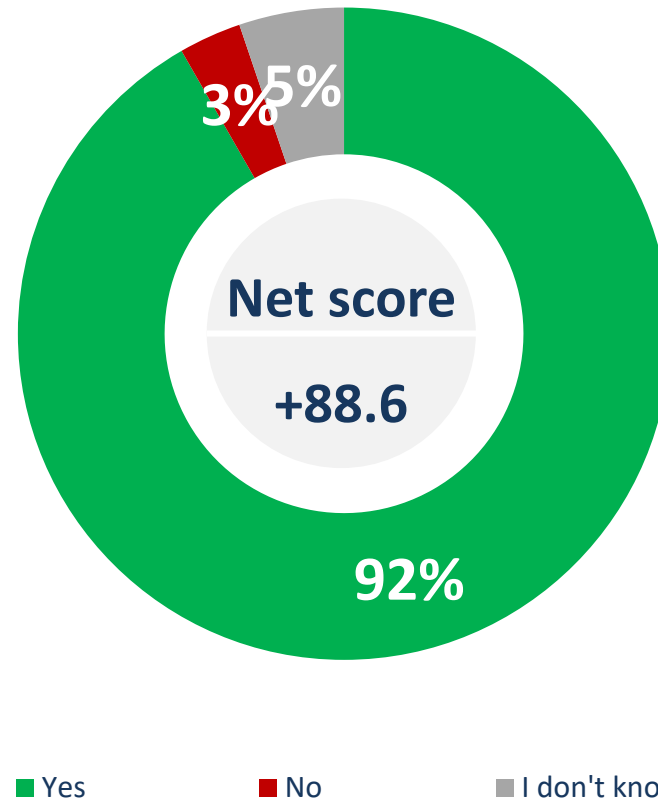


■ Strongly Disagree ■ Disagree ■ Slightly disagree
■ Neither ■ Slightly agree ■ Agree
■ Strongly agree

*Charts may not add up to 100 due to rounding.

QUESTION – Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

Phasing out oil and gas production and consumption is unnecessary because new technologies will dramatically reduce emissions from oil and gas



*Charts may not add up to 100 due to rounding.

QUESTION – Has the energy discourse in Canada become more polarized over the past 18 months?

Reason for polarization or lack of polarization of energy discourse

	Frequency (n=100)
Political talking point	39.2%
Both sides are entrenched	11.4%
Lack of strategy/Leadership	8.9%
Provincial differences	8.9%
Economy vs. Environment	7.6%
Special interest groups/big companies	6.3%
Media	5.1%
Lack of discourse	5.1%
Climate change deniers	2.5%
Other	5.1%

QUESTION – Why do think so? [OPEN]



“

Individuals in the private sector most frequently named as thought leaders in the energy sector, individuals in the public sector most frequently named as thought leaders in the environmental sector.

”

	Frequency (n=228)
Private Sector	26.3%
Academic	25.9%
Public Sector	24.1%
Media	7.5%
NGO	7.0%
Indigenous	3.5%
Other	5.7%

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

Leaders in environmental issues and policy

	Frequency (n=208)
Public Sector	27.9%
Academic	26.9%
Private Sector	22.1%
NGO	9.6%
Media	2.9%
Indigenous	2.4%
Other	8.2%

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

Top thought leaders in energy issues



Private Sector

Peter Tertzakian
Martha Hall Findlay
Steve Williams – former CEO of Suncor
Devin McCarthy
Ed Wittingham
Pembina Institute
Sophie Brochu
Sandra Odendahl
Chris Benedetti
CAPP
Ralph Torrie
Francis Bradley
Ken Ogilvie
Matt McCulloch

Dave Collyer
Graham Dyer
Lorraine Mitchelmore
Susannah Pierce
Allan Fogwill
Jackie Forrest
Amory Lovins
Joy Romero
Environmental Defence
Karen Lockridge
Simon Dyer
Michael Crothers



Academic

Mark Jaccard
Monica Gattinger
Andrew Leach
Mike Cleland
Merran Smith
Dave Sawyer
Valcav Smil
Nic Rivers
John Stewart
Christopher Ragan
Clean Energy Canada
IPCC
Tad Homer Dixon
Jack Mintz

Blair King
Jennifer Winter
Ursula Franklin
Robert Mansell
Erick LaChapelle
Chris Bataille
Jatin Nathwani
Blair Feltmate
EcoFiscal Canada
Joule Bergerson
Pierre-Olivier Pineau
Ross McKittrick
Stewart Elgie

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

***Note:** Names in bold have been mentioned more than once
and all others are single mentions

Top thought leaders in energy issues



Public Sector

Justin Trudeau
Elizabeth May
Jason Kenney
Catherine McKenna
Brad Wall
Andrew Scheer
Jagmeet Singh



Indigenous

Indigenous peoples
Autumn Peltier
JP Gladu
Eriel Deranger
Stephen Buffalo
Chris Henderson
Calvin Helin
Clayton Thomas-Muller



Media

Chris Turner
Rex Murphy
Andrew Coyne
Naomi Klein
Vivian Krause
Television and newspapers
Shawn McCarthy
Max Fawcett
Social Media
Toby Heaps



Environmental Association/NGO

David Suzuki
Tzeborah Berman
World Wildlife Fund
Chad Park
Eliza Olson
Energy Futures Lab
Greta Thunberg

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

***Note:** Names in bold have been mentioned more than once
and all others are single mentions

Top thought leaders in environmental issues



Public Sector

Elizabeth May	Terry Lake
Catherine McKenna	Ken Hartwick
Justin Trudeau	Scott Moe
Jason Kenney	Environment and Climate Change Canada
Maxime Bernier	Andrew Wilkinson
Steven Guilbeault	Stephane Dion
Brad Wall	Marlo Raynolds
Municipalities	Ministry of Environment Deputy
Andrew Scheer	Ministers
Greg Rickford	Zoe Carron
John Moffet	Steen Hume
Amarjeet Sohi	



Academic

Mark Jaccard	Blair King
Stewart Elgie	Fraser institute
Andrew Leach	David Schindler
Monica Gattinger	Louise Comeau
Merran Smith	Ken Coates
Christopher Ragan	Mark Winfield
Dave Sawyer	Nic Rivers
Martin Olszynski	Smart Prosperity
Ross McKittrick	Dan Woynillowicz
Clean Energy Canada	Jack Mintz
Jennifer Winter	Mark Mills
Kathryn Harrison	
Vaclav Smil	
Mike Cleland	
Jennifer Winter	

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

***Note:** Names in bold have been mentioned more than once
and all others are single mentions

Top thought leaders in environmental issues



Private Sector

Ed Whittingham
Pembina Institute
Tom Rand
Dave Collyer
Lisa DeMarco



Environmental Association/NGO

David Suzuki
Greta Thunberg
Tzeporah Berman
ONG environmental
Pollution Probe
WWF (World Wildlife Fund)
Sierra Club



Media

Vivian Krouse
Television - CBC and CTV news
John Robson
Shawn McCarthy
National newspapers - Post and Globe & Mail
Social media
Toby Heaps
Naomi Klein



Indigenous

Leroy Little Bear
JP Gladu
The Elders
First Nations Chiefs
Indigenous people



No category

Can't think of any/ No leaders
Youth

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

***Note:** Names in bold have been mentioned more than once
and all others are single mentions



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 100 environmental and energy leaders September 11th and October 4th, 2019. 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, leaders 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
Academic	20
Civil Servant	7
Energy Association	5
Energy Regulator	8
Environmental Association	4
Federal Member	1
First Nation Stakeholder	2
Municipal Leaders	6
NGO	5
Private Sector	29
Provincial Member	10
Senator	3
Total	100

TECHNICAL NOTE

Element	Description
Organization who commissioned the research	Positive Energy Project, University of Ottawa
Final Sample Size	100 environment and energy leaders
Margin of Error	No margin of error applies to this research.
Mode of Survey	Online outreach to environmental and energy leaders
Sampling Method Base	List provided by the University of Ottawa's Positive Energy initiative
Demographics (Captured)	Select group of environment and energy leaders
Fieldwork/Validation	Leader outreach.
Number of Calls	Maximum of five call backs OR not applicable
Time of Calls	Participants were not called.
Field Dates	September 11 th to October 4 th , 2019.
Language of Survey	The outreach was conducted in both English and French.
Standards	This report exceeds the standards set forth by CRIC, ESOMAR and AAPOR.

Element	Description
Weighting of Data	Not applicable.
Screening	Not applicable.
Stratification	Not applicable.
Estimated Response Rate	Five percent of those contacted participated in the research.
Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Question Content	All questions asked are contained in the report.
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.nanos.co Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com .



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This international joint venture between [dimap](http://www.dimap.com) and [Nanos](http://www.nanos.co) brings together top research and data experts from North American and Europe to deliver exceptional data intelligence to clients. The team offers data intelligence services ranging from demographic and sentiment microtargeting; consumer sentiment identification and decision conversion; and, data analytics and profiling for consumer persuasion.

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		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Thinking about your own personal view, do you believe that...	Climate change is definitely occurring	83	83.0	83.8	83.8
	Climate change is probably occurring	13	13.0	13.1	97.0
	Climate change is probably not occurring	2	2.0	2.0	99.0
	Not sure	1	1.0	1.0	100.0
	Total	99	99.0	100.0	
	No answer	1	1.0		
Total		100	100.0		

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Do you think climate change is:	Mostly human-caused	57	57.0	59.4	59.4
	Somewhat more human-caused	22	22.0	22.9	82.3
	About equally caused by human and natural changes	9	9.0	9.4	91.7
	Mostly caused by natural changes	4	4.0	4.2	95.8
	Somewhat more caused by natural changes	2	2.0	2.1	97.9
	Not sure	2	2.0	2.1	100.0
	Total	96	96.0	100.0	
	No answer	4	4.0		
Total		100	100.0		

Nanos conducted an online random survey of 100 Energy leaders, between September 11th to October 4th, 2019. There is no margin of error.

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Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

		Question - Provinces should be able to address climate change in whatever way they see fit	Question - The federal government has no role in how energy resources are developed in provinces	Question - The federal government needs to develop a long term energy vision for Canada – even if some provinces don't agree with it	Question - The consent of Indigenous peoples is the most important consideration for deciding whether or not an energy project should be approved	Question - Canada needs to invest tax dollars into retraining workers who may lose their jobs as the country addresses climate change	Question - Phasing out oil and gas production is unfair to people in provinces that produce it	Question - Phasing out oil and gas production and consumption is unnecessary because new technologies will dramatically reduce emissions from oil and gas	Question - It's impossible to power an advanced economy like Canada's using only renewable energy (e.g. hydro, wind and solar)	Question - Local communities should have the final say when deciding whether energy infrastructure projects (oil, gas, hydro, solar) that affect them should go ahead.	Question - Canada needs to have a carbon tax that applies across the country
N	Valid	98	98	98	100	97	98	98	97	99	96
	Missing	2	2	2	0	3	2	2	3	1	4
Mean		3.35	2.80	5.86	3.67	5.67	4.39	3.66	4.64	3.37	5.43
Median		2.50	2.00	7.00	4.00	6.00	5.00	4.00	5.00	3.00	6.00

Question - Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following? [RANDOMIZE]

		Question - Canada is already doing its fair share in addressing climate change.	Question - Canada can continue to develop fossil fuels such as oil sands in Alberta and still meet its climate commitments	Question - Generating more nuclear energy is one of the best ways of addressing climate change	Question - Canada needs to produce more renewable energy, even if it raises the cost of electricity for business and consumers	Question - The economic benefits of building new pipelines in Canada outweigh the risks from potential spills, tanker traffic and climate change	Question - Building new pipelines is incompatible with Canada's international obligations to reduce carbon emissions	Question - Since global demand for oil and gas is rising, Canada should expand production of oil and gas for export	Question - Canada should expand oil and gas production if it can produce its oil and gas with lower emissions than other countries	Question - Exporting Canadian natural gas to countries that use more polluting energy like coal is one of the most important things Canada can do to address climate change
N	Valid	100	94	96	99	98	97	98	98	99
	Missing	0	6	4	1	2	3	2	2	1
Mean		3.20	4.21	4.92	5.19	4.72	3.36	4.44	5.03	4.60
Median		3.00	5.00	6.00	6.00	6.00	2.00	5.00	6.00	5.00

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Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Canada needs to have a carbon tax that applies across the country	Strongly disagree	11	11.0	11.5	11.5
	Disagree	3	3.0	3.1	14.6
	Slightly disagree	2	2.0	2.1	16.7
	Neither	10	10.0	10.4	27.1
	Slightly agree	7	7.0	7.3	34.4
	Agree	18	18.0	18.8	53.1
	Strongly agree	45	45.0	46.9	100.0
	Total	96	96.0	100.0	
	Don't know	4	4.0		
Total		100	100.0		

Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Provinces should be able to address climate change in whatever way they see fit	Strongly disagree	23	23.0	23.5	23.5
	Disagree	26	26.0	26.5	50.0
	Slightly disagree	12	12.0	12.2	62.2
	Neither	5	5.0	5.1	67.3
	Slightly agree	7	7.0	7.1	74.5
	Agree	13	13.0	13.3	87.8
	Strongly agree	12	12.0	12.2	100.0
	Total	98	98.0	100.0	
	No answer	2	2.0		
Total		100	100.0		

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Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - The federal government has no role in how energy resources are developed in provinces	Strongly disagree	30	30.0	30.6	30.6
	Disagree	30	30.0	30.6	61.2
	Slightly disagree	12	12.0	12.2	73.5
	Neither	7	7.0	7.1	80.6
	Slightly agree	5	5.0	5.1	85.7
	Agree	3	3.0	3.1	88.8
	Strongly agree	11	11.0	11.2	100.0
	Total	98	98.0	100.0	
	No answer	2	2.0		
Total		100	100.0		



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Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - The federal government needs to develop a long term energy vision for Canada – even if some provinces don't agree with it	Strongly disagree	3	3.0	3.1	3.1
	Disagree	4	4.0	4.1	7.1
	Slightly disagree	5	5.0	5.1	12.2
	Neither	4	4.0	4.1	16.3
	Slightly agree	11	11.0	11.2	27.6
	Agree	20	20.0	20.4	48.0
	Strongly agree	51	51.0	52.0	100.0
	Total	98	98.0	100.0	
	Don't know	2	2.0		
Total		100	100.0		

Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - The consent of Indigenous peoples is the most important consideration for deciding whether or not an energy project should be approved	Strongly disagree	12	12.0	12.0	12.0
	Disagree	21	21.0	21.0	33.0
	Slightly disagree	16	16.0	16.0	49.0
	Neither	19	19.0	19.0	68.0
	Slightly agree	11	11.0	11.0	79.0
	Agree	13	13.0	13.0	92.0
	Strongly agree	8	8.0	8.0	100.0
	Total	100	100.0	100.0	



2019-1426 – University of Ottawa Positive Energy – Energy Panel – STAT SHEET

Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Canada needs to invest tax dollars into retraining workers who may lose their jobs as the country addresses climate change	Strongly disagree	4	4.0	4.1	4.1
	Disagree	3	3.0	3.1	7.2
	Slightly disagree	3	3.0	3.1	10.3
	Neither	8	8.0	8.2	18.6
	Slightly agree	12	12.0	12.4	30.9
	Agree	30	30.0	30.9	61.9
	Strongly agree	37	37.0	38.1	100.0
	Total	97	97.0	100.0	
	Don't know	2	2.0		
	No answer	1	1.0		
	Total	3	3.0		
Total		100	100.0		

Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Phasing out oil and gas production is unfair to people in provinces that produce it	Strongly disagree	13	13.0	13.3	13.3
	Disagree	12	12.0	12.2	25.5
	Slightly disagree	11	11.0	11.2	36.7
	Neither	10	10.0	10.2	46.9
	Slightly agree	11	11.0	11.2	58.2
	Agree	22	22.0	22.4	80.6
	Strongly agree	19	19.0	19.4	100.0
	Total	98	98.0	100.0	
	Don't know	2	2.0		
Total		100	100.0		

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Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Phasing out oil and gas production and consumption is unnecessary because new technologies will dramatically reduce emissions from oil and gas	Strongly disagree	17	17.0	17.3	17.3
	Disagree	25	25.0	25.5	42.9
	Slightly disagree	6	6.0	6.1	49.0
	Neither	8	8.0	8.2	57.1
	Slightly agree	15	15.0	15.3	72.4
	Agree	22	22.0	22.4	94.9
	Strongly agree	5	5.0	5.1	100.0
	Total	98	98.0	100.0	
	Don't know	1	1.0		
	No answer	1	1.0		
	Total	2	2.0		
Total		100	100.0		

Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - It's impossible to power an advanced economy like Canada's using only renewable energy (e.g. hydro, wind and solar)	Strongly disagree	10	10.0	10.3	10.3
	Disagree	13	13.0	13.4	23.7
	Slightly disagree	11	11.0	11.3	35.1
	Neither	8	8.0	8.2	43.3
	Slightly agree	9	9.0	9.3	52.6
	Agree	18	18.0	18.6	71.1
	Strongly agree	28	28.0	28.9	100.0
	Total	97	97.0	100.0	
	Don't know	3	3.0		
Total		100	100.0		



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Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Local communities should have the final say when deciding whether energy infrastructure projects (oil, gas, hydro, solar) that affect them should go ahead.	Strongly disagree	18	18.0	18.2	18.2
	Disagree	26	26.0	26.3	44.4
	Slightly disagree	16	16.0	16.2	60.6
	Neither	9	9.0	9.1	69.7
	Slightly agree	7	7.0	7.1	76.8
	Agree	16	16.0	16.2	92.9
	Strongly agree	7	7.0	7.1	100.0
	Total	99	99.0	100.0	
	No answer	1	1.0		
Total		100	100.0		

Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Canada is already doing its fair share in addressing climate change.	Strongly disagree	22	22.0	22.0	22.0
	Disagree	26	26.0	26.0	48.0
	Slightly disagree	17	17.0	17.0	65.0
	Neither	5	5.0	5.0	70.0
	Slightly agree	10	10.0	10.0	80.0
	Agree	15	15.0	15.0	95.0
	Strongly agree	5	5.0	5.0	100.0
	Total	100	100.0	100.0	



2019-1426 – University of Ottawa Positive Energy – Energy Panel – STAT SHEET

Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Canada can continue to develop fossil fuels such as oil sands in Alberta and still meet its climate commitments	Strongly disagree	19	19.0	20.2	20.2
	Disagree	10	10.0	10.6	30.9
	Slightly disagree	6	6.0	6.4	37.2
	Neither	6	6.0	6.4	43.6
	Slightly agree	15	15.0	16.0	59.6
	Agree	26	26.0	27.7	87.2
	Strongly agree	12	12.0	12.8	100.0
	Total	94	94.0	100.0	
	Don't know	4	4.0		
	No answer	2	2.0		
	Total	6	6.0		
Total		100	100.0		

Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Generating more nuclear energy is one of the best ways of addressing climate change	Strongly disagree	9	9.0	9.4	9.4
	Disagree	11	11.0	11.5	20.8
	Slightly disagree	5	5.0	5.2	26.0
	Neither	5	5.0	5.2	31.3
	Slightly agree	16	16.0	16.7	47.9
	Agree	24	24.0	25.0	72.9
	Strongly agree	26	26.0	27.1	100.0
	Total	96	96.0	100.0	
	Don't know	3	3.0		
	No answer	1	1.0		
	Total	4	4.0		
Total		100	100.0		

Nanos conducted an online random survey of 100 Energy leaders, between September 11th to October 4th, 2019. There is no margin of error.

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Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Canada needs to produce more renewable energy, even if it raises the cost of electricity for business and consumers	Strongly disagree	7	7.0	7.1	7.1
	Disagree	10	10.0	10.1	17.2
	Slightly disagree	3	3.0	3.0	20.2
	Neither	8	8.0	8.1	28.3
	Slightly agree	11	11.0	11.1	39.4
	Agree	29	29.0	29.3	68.7
	Strongly agree	31	31.0	31.3	100.0
	Total	99	99.0	100.0	
	Don't know	1	1.0		
Total		100	100.0		

Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - The economic benefits of building new pipelines in Canada outweigh the risks from potential spills, tanker traffic and climate change	Strongly disagree	14	14.0	14.3	14.3
	Disagree	9	9.0	9.2	23.5
	Slightly disagree	8	8.0	8.2	31.6
	Neither	6	6.0	6.1	37.8
	Slightly agree	11	11.0	11.2	49.0
	Agree	22	22.0	22.4	71.4
	Strongly agree	28	28.0	28.6	100.0
	Total	98	98.0	100.0	
	Don't know	2	2.0		
Total		100	100.0		

Nanos conducted an online random survey of 100 Energy leaders, between September 11th to October 4th, 2019. There is no margin of error.

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Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Building new pipelines is incompatible with Canada's international obligations to reduce carbon emissions	Strongly disagree	25	25.0	25.8	25.8
	Disagree	25	25.0	25.8	51.5
	Slightly disagree	8	8.0	8.2	59.8
	Neither	9	9.0	9.3	69.1
	Slightly agree	5	5.0	5.2	74.2
	Agree	9	9.0	9.3	83.5
	Strongly agree	16	16.0	16.5	100.0
	Total	97	97.0	100.0	
	Don't know	2	2.0		
	No answer	1	1.0		
	Total	3	3.0		
Total		100	100.0		

Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Since global demand for oil and gas is rising, Canada should expand production of oil and gas for export	Strongly disagree	17	17.0	17.3	17.3
	Disagree	9	9.0	9.2	26.5
	Slightly disagree	6	6.0	6.1	32.7
	Neither	6	6.0	6.1	38.8
	Slightly agree	22	22.0	22.4	61.2
	Agree	18	18.0	18.4	79.6
	Strongly agree	20	20.0	20.4	100.0
	Total	98	98.0	100.0	
	Don't know	1	1.0		
	No answer	1	1.0		
	Total	2	2.0		
Total		100	100.0		



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Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Canada should expand oil and gas production if it can produce its oil and gas with lower emissions than other countries	Strongly disagree	8	8.0	8.2	8.2
	Disagree	8	8.0	8.2	16.3
	Slightly disagree	9	9.0	9.2	25.5
	Neither	6	6.0	6.1	31.6
	Slightly agree	14	14.0	14.3	45.9
	Agree	23	23.0	23.5	69.4
	Strongly agree	30	30.0	30.6	100.0
	Total	98	98.0	100.0	
	Don't know	1	1.0		
	No answer	1	1.0		
	Total	2	2.0		
Total		100	100.0		

Do you strongly disagree, disagree, slightly disagree, neither, slightly agree, agree or strongly agree with the following?

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Exporting Canadian natural gas to countries that use more polluting energy like coal is one of the most important things Canada can do to address climate change	Strongly disagree	9	9.0	9.1	9.1
	Disagree	16	16.0	16.2	25.3
	Slightly disagree	8	8.0	8.1	33.3
	Neither	7	7.0	7.1	40.4
	Slightly agree	15	15.0	15.2	55.6
	Agree	21	21.0	21.2	76.8
	Strongly agree	23	23.0	23.2	100.0
	Total	99	99.0	100.0	
	Don't know	1	1.0		
Total		100	100.0		



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		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Has the energy discourse in Canada become more polarized over the past 18 months?	Yes	88	88.0	91.7	91.7
	No	3	3.0	3.1	94.8
	I don't know	5	5.0	5.2	100.0
	Total	96	96.0	100.0	
	No answer	4	4.0		
Total		100	100.0		

		Frequency	Percent	Valid Percent	Cumulative Percent
Question - Why do think so? [Open]	Political talking point	31	31.0	39.2	39.2
	Climate change deniers	2	2.0	2.5	41.8
	Lack of strategy/Leadership	7	7.0	8.9	50.6
	Both sides are entrenched	9	9.0	11.4	62.0
	Special interest groups/big companies	5	5.0	6.3	68.4
	Economy vs. Environment	6	6.0	7.6	75.9
	Provincial differences	7	7.0	8.9	84.8
	Media	4	4.0	5.1	89.9
	Lack of discourse	4	4.0	5.1	94.9
	Other	4	4.0	5.1	100.0
	Total	79	79.0	100.0	
	No answer	21	21.0		
Total		100	100.0		



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		Responses		
		N	Percent	Percent of Cases
Question - Who are the top five thought leaders when it comes to energy issues and policy in Canada? [Open]	Andrew Scheer	2	0.9%	3.1%
	Sophie Brochu	1	0.4%	1.5%
	Vivian Krause	1	0.4%	1.5%
	Mark Jaccard	10	4.4%	15.4%
	Sandra Odendahl	1	0.4%	1.5%
	David Suzuki	9	3.9%	13.8%
	Indigenous peoples	2	0.9%	3.1%
	Dave Sawyer	3	1.3%	4.6%
	Chris Benedetti	1	0.4%	1.5%
	Jason Kenney	7	3.1%	10.8%
	Justin Trudeau	8	3.5%	12.3%
	Andrew Leach	8	3.5%	12.3%
	they don't exist/ No leader	8	3.5%	12.3%
	CAPP	1	0.4%	1.5%
	Vaclav Smil	2	0.9%	3.1%
	IPCC	1	0.4%	1.5%
	Peter Tertzakian	13	5.7%	20.0%
	Clean Energy Canada	1	0.4%	1.5%
	Mike Cleland	4	1.7%	6.2%
	Tad Homer Dixon	1	0.4%	1.5%
	Jack Mintz	1	0.4%	1.5%
	Provinces with fossil resources	1	0.4%	1.5%
	Blair King	1	0.4%	1.5%
	Too many to pick	1	0.4%	1.5%
	Martha Hall Findlay	3	1.3%	4.6%
	Steve Williams	3	1.3%	4.6%
	Television and newspapers	1	0.4%	1.5%
	Ralph Torrie	1	0.4%	1.5%
	Catherine Mckenna	5	2.2%	7.7%
	Monica Gattinger	10	4.4%	15.4%
	Robert Paige	1	0.4%	1.5%
	JP Gladu	1	0.4%	1.5%
	Elizabeth May	8	3.5%	12.3%
	Jagmeet Singh	2	0.9%	3.1%
	Francis Bradley	1	0.4%	1.5%
	Jim Carr	1	0.4%	1.5%

Nanos conducted an online random survey of 100 Energy leaders, between September 11th to October 4th, 2019. There is no margin of error.

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	Responses		
	N	Percent	Percent of Cases
Scott moe	2	0.9%	3.1%
Ken Ogilvie	1	0.4%	1.5%
Autumn Peltier	2	0.9%	3.1%
Matt McCulloch	1	0.4%	1.5%
Nic Rivers	2	0.9%	3.1%
Shawn McCarthy	1	0.4%	1.5%
Maxime Bernier	2	0.9%	3.1%
Tzeborah Berman	2	0.9%	3.1%
Max Fawcett	1	0.4%	1.5%
ECC	1	0.4%	1.5%
Greta Thunberg	1	0.4%	1.5%
Dave Collyer	1	0.4%	1.5%
Chad Park	1	0.4%	1.5%
Christopher Ragan	3	1.3%	4.6%
Smart Prosperity	1	0.4%	1.5%
Our youth	1	0.4%	1.5%
Eriel Deranger	1	0.4%	1.5%
Federal Government	1	0.4%	1.5%
Andrew Coyne	2	0.9%	3.1%
Jennifer Winter	1	0.4%	1.5%
John Stewart	2	0.9%	3.1%
Social Media	1	0.4%	1.5%
Ursula Franklin	1	0.4%	1.5%
Robert Mansell	1	0.4%	1.5%
Graham Dyer	1	0.4%	1.5%
canada energy regulator	1	0.4%	1.5%
Eliza Olson	1	0.4%	1.5%
Erick LaChapelle	1	0.4%	1.5%
Dustin Duncan	1	0.4%	1.5%
Brad Wall	3	1.3%	4.6%
Lorraine Mitchelmore	1	0.4%	1.5%
Susannah Pierce	1	0.4%	1.5%
David Layzell	1	0.4%	1.5%
Rachel Notley	1	0.4%	1.5%
Chris Bataille	1	0.4%	1.5%
Jatin Nathwani	1	0.4%	1.5%
Merran Smith	3	1.3%	4.6%

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	Responses		
	N	Percent	Percent of Cases
World Wildlife Fund	2	0.9%	3.1%
Blair Feltmate	1	0.4%	1.5%
Merran Smith	1	0.4%	1.5%
EcoFiscal Canada	1	0.4%	1.5%
Allan Fogwill	1	0.4%	1.5%
fossil fuel industries	1	0.4%	1.5%
Ed Wittingham	2	0.9%	3.1%
Rex Murphy	3	1.3%	4.6%
Jackie Forrest	1	0.4%	1.5%
Alberta Premier	1	0.4%	1.5%
Amory Lovins	1	0.4%	1.5%
Joule Bergerson	1	0.4%	1.5%
Brundtland	1	0.4%	1.5%
Oil and Gas Regulators	1	0.4%	1.5%
Pierre-Olivier Pineau	1	0.4%	1.5%
BC's Green Party Leader	1	0.4%	1.5%
Devin McCarthy	3	1.3%	4.6%
Stephen Buffalo	1	0.4%	1.5%
Joy Romero	1	0.4%	1.5%
Ross McKittrick	1	0.4%	1.5%
Chris Turner	4	1.7%	6.2%
Energy Futures Lab	1	0.4%	1.5%
Environmental Defence	1	0.4%	1.5%
Karen Lockridge	1	0.4%	1.5%
Simon Dyer	1	0.4%	1.5%
Pembina Institute	2	0.9%	3.1%
Scientists	1	0.4%	1.5%
Clayton Thomas-Muller	1	0.4%	1.5%
Michael Crothers	1	0.4%	1.5%
Stewart Elgie	1	0.4%	1.5%
Werner Kurtz	1	0.4%	1.5%
Ministry of Energy Deputy Ministers	1	0.4%	1.5%
Lori Ackerman	1	0.4%	1.5%
Calvin Helin	1	0.4%	1.5%
Naomi Klein	2	0.9%	3.1%
Ron Dizy	1	0.4%	1.5%
Canada West Foundation	1	0.4%	1.5%

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		Responses		
		N	Percent	Percent of Cases
	Municipalities	1	0.4%	1.5%
	Alex Pourbaix	1	0.4%	1.5%
	Toby Heaps	1	0.4%	1.5%
	David Collier	1	0.4%	1.5%
	Dave Nikolesjan	1	0.4%	1.5%
	Chris Henderson	1	0.4%	1.5%
Total		229	100.0%	352.3%

		Responses		
		N	Percent	Percent of Cases
Question - Who are the top five thought leaders when it comes to energy issues and policy in Canada? [Open]	Academic	59	25.9%	90.8%
	NGO	16	7.0%	24.6%
	Indigenous	8	3.5%	12.3%
	Media	17	7.5%	26.2%
	Private Sector	60	26.3%	92.3%
	Public Sector	55	24.1%	84.6%
	Other	13	5.7%	20.0%
Total		228	100.0%	350.8%



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		Responses		
		N	Percent	Percent of Cases
Question - Who are the top five thought leaders when it comes to environmental issues and policy in Canada? [Open]	Mark Jaccard	8	3.8%	13.8%
	Catherine McKenna	12	5.7%	20.7%
	Can't think of any/ No leaders	10	4.8%	17.2%
	Kathryn Harrison	1	0.5%	1.7%
	Leroy Little Bear	1	0.5%	1.7%
	Dave Sawyer	2	1.0%	3.4%
	Robyn Gray	1	0.5%	1.7%
	Jason Kenney	3	1.4%	5.2%
	No Politicians. They only think of politizing it	1	0.5%	1.7%
	Andrew Leach	8	3.8%	13.8%
	Justin Trudeau	6	2.9%	10.3%
	WWW	1	0.5%	1.7%
	Elizabeth May	17	8.1%	29.3%
	Vaclav Smil	1	0.5%	1.7%
	David Suzuki	10	4.8%	17.2%
	Tzeporah Berman	4	1.9%	6.9%
	Ecofiscal Canada	1	0.5%	1.7%
	Mike Cleland	1	0.5%	1.7%
	Merran Smith	4	1.9%	6.9%
	ONG environnementales	1	0.5%	1.7%
	Blair King	1	0.5%	1.7%
	Too many and too varied to pick, choose and rank.	1	0.5%	1.7%
	Ed Whittingham	4	1.9%	6.9%
	Chris Ragan	2	1.0%	3.4%
	Ross McKittrick	3	1.4%	5.2%
	Monica Gattinger	2	1.0%	3.4%
	Television - CBC and CTV news	1	0.5%	1.7%
	Lois Corbett	1	0.5%	1.7%
	Fraser institute	1	0.5%	1.7%
	Diane Saxe	1	0.5%	1.7%
	JP Gladu	1	0.5%	1.7%
	Gwynn Morgan	1	0.5%	1.7%
	Greg Rickford	1	0.5%	1.7%
	Patrick Watson	1	0.5%	1.7%

Nanos conducted an online random survey of 100 Energy leaders, between September 11th to October 4th, 2019. There is no margin of error.

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	Responses		
	N	Percent	Percent of Cases
Pembina Institute	4	1.9%	6.9%
John Robson	1	0.5%	1.7%
Stewart Elgie	6	2.9%	10.3%
Peter Tertzakian	1	0.5%	1.7%
John Moffet	1	0.5%	1.7%
Amarjeet Sohi	1	0.5%	1.7%
Martin Olszynski	2	1.0%	3.4%
Blake Shaffer	1	0.5%	1.7%
The Elders	1	0.5%	1.7%
Shawn McCarthy	1	0.5%	1.7%
Maxime Bernier	2	1.0%	3.4%
Mike Gerbis	1	0.5%	1.7%
Steven Guilbeault	2	1.0%	3.4%
Clean Energy Canada	2	1.0%	3.4%
Youth	1	0.5%	1.7%
David Schindler	1	0.5%	1.7%
Tom Rand	2	1.0%	3.4%
Some provincial governments	1	0.5%	1.7%
Terry Lake	1	0.5%	1.7%
Jennifer Winter	2	1.0%	3.4%
Dave Collyer	2	1.0%	3.4%
National newspapers - Post and Globe & Mail	1	0.5%	1.7%
Louise Comeau	1	0.5%	1.7%
CD Howe institute	1	0.5%	1.7%
Ken Coates	1	0.5%	1.7%
Brad Wall	2	1.0%	3.4%
Oil and Gas Regulators	1	0.5%	1.7%
Ken Hartwick	1	0.5%	1.7%
Scott Moe	1	0.5%	1.7%
Lisa DeMarco	2	1.0%	3.4%
Pollution Probe	1	0.5%	1.7%
Naomi Klein	1	0.5%	1.7%
Environment and Climate Change Canada	1	0.5%	1.7%
Greta Thunberg	2	1.0%	3.4%
Graham Saul	1	0.5%	1.7%
Municipalities	2	1.0%	3.4%

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	Responses		
	N	Percent	Percent of Cases
Andrew Wilkinson	1	0.5%	1.7%
Dale Beugin	1	0.5%	1.7%
Social media	1	0.5%	1.7%
Stephane Dion	1	0.5%	1.7%
CAPP	1	0.5%	1.7%
Unsure	1	0.5%	1.7%
Vivian Krouse	2	1.0%	3.4%
First Nations Chiefs	1	0.5%	1.7%
Peter Greg	1	0.5%	1.7%
Tim Ball	1	0.5%	1.7%
Marlo Reynolds	1	0.5%	1.7%
Chris Turner	2	1.0%	3.4%
WWF	1	0.5%	1.7%
Mark Winfield	1	0.5%	1.7%
Nic Rivers	1	0.5%	1.7%
Sierra Club	1	0.5%	1.7%
Andrew Scheer	2	1.0%	3.4%
Smart Prosperity	1	0.5%	1.7%
Indigenous people	1	0.5%	1.7%
The professor from the U of Alberta - contributed to the Notley climate policy package. Can't recall his name.	1	0.5%	1.7%
Jamie Kneen	1	0.5%	1.7%
Dan Woynillowicz	1	0.5%	1.7%
Magazines	1	0.5%	1.7%
Toby Heaps	1	0.5%	1.7%
Jack Mintz	1	0.5%	1.7%
Ministry of Environment Deputy Ministers	1	0.5%	1.7%
Dave Butters	1	0.5%	1.7%
Zoe Carron	1	0.5%	1.7%
IISD	1	0.5%	1.7%
Celine Bak	1	0.5%	1.7%
Andrew Weaver	1	0.5%	1.7%
Sara Hastings-Simon	1	0.5%	1.7%
Susanna Fuller	1	0.5%	1.7%
CAEPLA	1	0.5%	1.7%
Al Gore	1	0.5%	1.7%

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		Responses		
		N	Percent	Percent of Cases
	Michael Shellenberger (foreign)	1	0.5%	1.7%
	Steen Hume	1	0.5%	1.7%
	Mark Mills	1	0.5%	1.7%
Total		210	100.0%	362.1%

		Responses		
		N	Percent	Percent of Cases
Question - Who are the top five thought leaders when it comes to environmental issues and policy in Canada?	Academic	56	26.9%	100.0%
	NGO	20	9.6%	35.7%
	Indigenous	5	2.4%	8.9%
	Media	6	2.9%	10.7%
	Private Sector	46	22.1%	82.1%
	Public Sector	58	27.9%	103.6%
	Other	17	8.2%	30.4%
Total		208	100.0%	371.4%