

Energy and environmental leaders' views of challenges in the energy sector

Energy Panel Launch Summary

submitted by Nanos to the University of Ottawa, November 2016
(Submission 2016-739)





Misinformation, lack of knowledge and environmental concerns top challenges for energy projects according to thought leaders

Energy and environmental leaders say that misinformation/lack of knowledge and environmental concerns are the top challenge for energy projects, while greenhouse emissions and fossil fuel related pollution are the top challenge for environmental stewardship. Engagement and equal participation are the top challenge in terms of Indigenous communities and the energy sector. Panel participants recommend increased transparency/clarification for the public as a strategy for increasing public confidence in energy projects.

Energy projects and challenges

- **Top challenges to energy projects include misinformation/lack of knowledge and environmental concerns** – Of the 112 environmental and energy leaders who shared their opinions on this issue, 22 said the number one challenge to developing energy projects in a manner that Canadians have confidence in is misinformation and lack of knowledge/understanding of energy needs and impacts, 21 said environmental concerns and ensuring sustainability, 13 said a lack of trust in institutions and key regulatory processes, 10 said balancing conflicting stakeholder interests, lack of transparency/lack of clear process and lack of a national energy, respectively, nine said obtaining social license/buy-in from advocacy groups, native and local communities, eight said cost/funding of project and cost transfer to consumer, seven said aligning projects with public interests/current Canadian values and two said addressing NIMBY concerns/safety.
- **Reducing greenhouse emissions and fossil fuel related pollution is top challenge in environmental stewardship** – Asked what they see as the number one challenge in terms of environmental stewardship, 41 of 112 participants said addressing climate change by reducing greenhouse emissions/reducing fossil fuel related pollution, while 15 said a lack of trust in institutions and key regulatory processes/leaders, 13 a lack of clear and consistent regulations, 10 said impact on the economy, nine said misinformation/lack of knowledge, balancing conflicting stakeholder interests and challenges related to adopting clean/sustainable technologies, respectively. Four participants said lack of compliance with policy and rules.

- **Engagement and equal participation top challenge in terms of Indigenous communities and the energy sector** – Forty-one of 107 energy and environmental leaders said engaging Indigenous communities and ensuring equal participation with the project development process is the number one challenge in terms of Indigenous communities and the energy sector. Twelve said recognition and respect of Indigenous rights/treaty rights and issues related to access to wealth/economic opportunities in Indigenous communities, respectively. Ten said recognition and respect of Indigenous cultural norms, while eight said lack of trust and relationship building between sector and Indigenous communities, seven said lack of clarity around government and industry responsibilities and five ensuring access to sustainable energy.

Energy project strategies

- **Increased transparency/clarification for the public top strategy for increasing public confidence in energy projects** – Asked what strategies could be used to strengthen public confidence in energy projects in Canada, 34 of 109 participants in the energy panel said increased transparency/clarification for the public, 21 said reassessing the methods of regulation and oversight, 15 said an environmentally-focused strategy, 14 said partnerships/joint strategy/consultations between stakeholders, nine said involving and independent third party, eight said increased research/analysis of the field. Three said a national strategy and improving Indigenous economic/social agency, respectively.

Key influencers

- **Environmental non-governmental organizations are top influencers in environmental issues** – According to the energy and environmental leaders on the panel, the top five influencers in environmental issues are other environmental non-governmental organizations/environmental activists (88 of 377 mentions), other politicians or political figures (e.g. May/Trudeau) (45 of 377 mentions), special interest groups/companies/industry associations (42 of 377 mentions), media including journalists/social media and David Suzuki/Suzuki Foundation (27 of 377 mentions).
- **Energy companies and associations are top influencers in energy issues** – Energy and environmental leaders said that the top five influencers in energy issues include energy companies and associations (81 of 330 mentions), politicians and political figures (49 of 330 mentions), environmental non-governmental organizations (37 of 330 mentions), provincial government (26 of 330 mentions) and the government/federal government (26 of 330 mentions).

The opinions in this report are based on the compiled views of 141 environmental and energy leaders between August 15th and October 4th, 2016. Readers should note that the research is representative of the participants and should not be projected to any population, elite or general.

This study was commissioned by the University of Ottawa.

Challenges to developing energy projects

Source: Nanos Research outreach to 141 environmental and energy leaders in Canada, from August 15th to October 4th, 2016.

	Frequency (n=112)
Misinformation and lack of knowledge/understanding of energy needs and impacts	22
Environmental concerns and ensuring sustainability	21
A lack of trust in institutions and key regulatory processes	13
Balancing conflicting stakeholder interests	10
Lack of transparency/lack of clear process	10
Lack of national energy strategy	10
Obtaining social licence/buy in from advocacy groups, native and local communities	9
Cost/funding of project and cost transfer consumer	8
Aligning projects with public interests /current Canadian values	7
Addressing NIMBY concerns/safety	2

QUESTION – What would you say is the number one challenge to developing energy projects in a manner that Canadians can have confidence in? [OPEN-ENDED]

Energy and environmental challenges

Source: Nanos Research outreach to 141 environmental and energy leaders in Canada, from August 15th to October 4th, 2016.

	Frequency (n=112)
Addressing climate change by reducing greenhouse emissions/Reducing fossil fuel related pollution	41
A lack of trust in institutions and key regulatory processes/leaders	15
Lack of clear and consistent regulations and direction on energy standards	13
Impact on economy	10
Misinformation and lack of knowledge/understanding energy industries and environmental initiatives	9
Balancing conflicting stakeholder interests	9
Challenges related to adopting clean and sustainable energy solutions/technology	9
Lack of compliance with policy/rules/direction	4
Other	2

QUESTION – What is the number one challenge in terms of environmental stewardship and the energy sector? [OPEN-ENDED]

Energy and Indigenous challenges

Source: Nanos Research outreach to 141 environmental and energy leaders in Canada, from August 15th to October 4th, 2016.

	Frequency (n=107)
Engaging Indigenous communities and ensuring equal participation with project development process	41
Recognition and respect of Indigenous rights/treaty rights	12
Issues related to access to wealth/economic opportunities in Indigenous communities	12
Recognition and respect of Indigenous cultural norms	10
Lack of trust and relationship building between sector and Indigenous communities	8
Lack of clarity around government and industry responsibilities	7
Ensuring access to sustainable energy	5
Other	5
Unsure	7

QUESTION – What is the number one challenge in terms of Indigenous communities and the energy sector? [OPEN-ENDED]

Energy project strategies

Source: Nanos Research outreach to 141 environmental and energy leaders in Canada, from August 15th to October 4th, 2016.

	Frequency (n=109)
Increased transparency/clarification for the public	34
Reassess the methods of regulation and oversight	21
An environmentally-focused strategy	15
Partnerships/joint strategy/consultations between stakeholders	14
Involve an independent third party	9
Increased research/analysis of the field	8
A national strategy/policy rather than regional	3
Improve Indigenous economic/social agency	3
Unsure	2

QUESTION – What strategies could be used to help strengthen public confidence in energy projects in Canada? [OPEN-ENDED]

Top influencers in environmental issues

Source: Nanos Research outreach to 141 environmental and energy leaders in Canada, from August 15th to October 4th, 2016.



Government

Government / Regulatory Bodies
Federal government
Provincial governments
Municipal and local Governments/Federation of Canadian Municipalities
Government of Alberta
Federal Special Advisor to the PMO Gerald Butts
Marlo Reynolds
US Government
Saskatchewan Government
Ontario Government



First Nation Stakeholder

Aboriginal groups / Indigenous nations



Environmental Association/NGO

Environmental groups / ENGOS / Advocates
David Suzuki/Suzuki Foundation
Greenpeace, Tzeporah Berman
WWF, Equiterre, Tides
Nature Conservancy
Merran Smith (Clean Energy Canada)
CELA
UNFCCC
Sierra Club of Canada
Green Budget Coalition
Civil society Leaders
NRDC
Mike Hudema
Council of Canadians



Ministers/Politicians/Municipal Leaders

Prime Ministers / Premiers / Mayors
Catherine McKenna, Justin Trudeau
Politicians, Elizabeth May
Premiers of energy producing provinces, Green Party
Rachel Notley, Andrew Weaver, Barry Penner
Shannon Phillips, Glen Murray

QUESTION – Who would you say are the top five influencers in environmental issues in Canada?

Top influencers in environmental issues (continued)

Source: Nanos Research outreach to 141 environmental and energy leaders in Canada, from August 15th to October 4th, 2016.



Media

Media/Social media

Editorial writers/bloggers

National Post - Terrence Corcoran



Academic

**Academia/Universities/Scientists/
Researchers**

Pembina Institute, Sustainable Prosperity

Chris Ragan - Eco Fiscal

Fraser Institute (Marc Jaccard)

Think Tanks

Naomi Klein, Stewart Elgie

Andrew Leach



Private Sector/Energy Association

Canadian energy sector/Energy companies/Industry

Special Interest Groups / Lobbyists

CAPP, Oil and Gas Associations/companies

Steve Williams (Suncor)

Financial Sector/Non-energy companies

Resource owners

CEOs

Rockefeller

Unions



No category

Population (i.e., general public)

Socio economic associations

QUESTION – Who would you say are the top five influencers in environmental issues in Canada?

Top influencers in energy issues

Source: Nanos Research outreach to 141 environmental and energy leaders in Canada, from August 15th to October 4th, 2016.



Government/Energy Regulator

Government / Regulatory Bodies

Provincial governments

Federal government, National Energy Board

Government of Alberta

Saskatchewan Government

Municipal and local governments/Federation of Canadian Municipalities

Federal Special Advisor to the PMO Gerald Butts

Governor of the Bank of Canada (Stephen Poloz)

Natural Resources Canada

US Government, IEA



First Nation Stakeholder

Aboriginal groups / Indigenous nations

Calvin Helin



Environmental Association/NGO

Environmental groups / ENGOS / Advocates

Merran Smith (Clean Energy Canada)

David Suzuki/Suzuki Foundation, WWF

Jack Gibbons, Greenpeace



Ministers/Politicians/Municipal Leaders

Prime Ministers / Premiers / Mayors

Rachel Notley, Justin Trudeau

Politicians

Christy Clark

Saskatchewan Premier Brad Wall

Minister Jim Carr, Catherine McKenna, Premiers of energy producing provinces

Kathleen Wynne

Naheed Nenshi, Elizabeth May

QUESTION – Who would you say are the top five influencers for energy issues in Canada?

Top influencers in energy issues (continued)

Source: Nanos Research outreach to 141 environmental and energy leaders in Canada, from August 15th to October 4th, 2016.



Media

Media/Social media

Globe

National Post - Terrence Corcoran

Tim Egan, Rex Murphy, Deborah Yedlin

Editorial writers/bloggers



Private Sector/Energy Association

Canadian energy sector / Energy companies / Industry

CAPP, Steve Williams (Suncor)

Oil and Gas Associations/companies

Special Interest Groups / Lobbyists

Financial Sector/Non-energy companies

Investors, CEOs, Murray Edwards (CNRL)

Enbridge, Peter Tertzakian, TransCanada

Canadian Chamber of Commerce (Perrin Beatty)

Sergio Marchi (Canadian Electricity Association)

Capital Markets, Gwyn Morgan

Brian Ferguson

Shell, Canadian Vehicle Manufacturer's Association

Hydro Ontario, Canadian Clean Technology Partnership

Sarah Irving



Academic

Academia / Universities / Scientists / Researchers

Think Tanks

Pembina Institute

Chris Ragan - Eco Fiscal, Andrew Leach

Fraser Institute (Marc Jaccard)

Brian Lee Crowley, Jack Mintz

Sean Speer, David Wheeler, Jeff Rubin



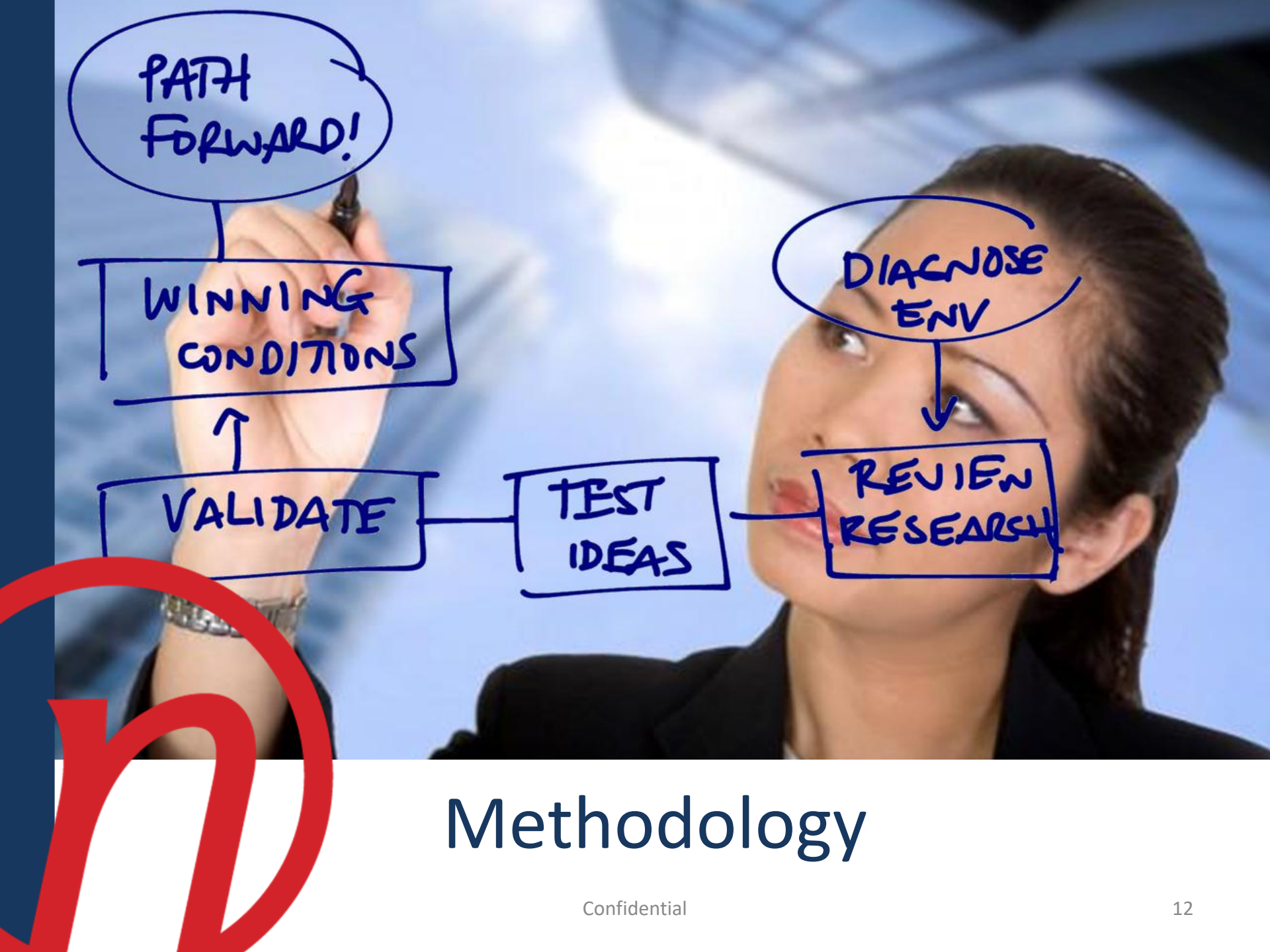
No category

Consumers

Population (i.e., general public)

Socio economic associations

QUESTION – Who would you say are the top five influencers for energy issues in Canada?



Methodology

Methodology

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

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

The opinions in this report are based on the compiled views of 141 environmental and energy leaders between August 15th and October 4th, 2016. For the distribution of panel members, please see next page. Readers should note that the research is representative of the participants and should not be projected to any population, elite or general.

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	37
Private Sector	26
Municipal Leaders	11
NGO	11
No category listed	11
Provincial Member	11
Environmental Association	7
Energy Association	6
Civil Servant	4
Energy Regulator	4
Environmental Regulator	2
Federal Member	2
First Nation Stakeholder	2
Media	2
Member of Positive Energy Advisory Council	2
Deputy Minister	1
Minister	1
Opposition Critic	1
Total	141

About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



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Technical Note

Element	Description
Organization who commissioned the research	Positive Energy Project, University of Ottawa
Final Sample Size	141 elite environment and energy stakeholders.
Margin of Error	No margin of error applies to this research.
Mode of Survey	Elite online outreach
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	Elite outreach.
Number of Calls	Participants were not called.
Time of Calls	Participants were not called.
Field Dates	August 15 th to October 4 th , 2016.
Language of Survey	The outreach was conducted in both English and French.

Element	Description
Weighting of Data	Not applicable.
Stratification	Not applicable.
Estimated Response Rate	Nine 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.nanosresearch.com Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.



Tabulations

Confidential



2015-739 – Energy Panel – Energy and Environmental Leaders Outreach – STAT SHEET

		Frequency	Percent	Valid Percent	Cumulative Percent
Question 1 - What would you say is the number one challenge to developing energy projects in a manner that Canadians can have confidence in? [Open-ended]	Misinformation and lack of knowledge/understanding of energy needs and impacts	22	15.6	19.6	19.6
	Environmental concerns and insuring sustainability	21	14.9	18.8	38.4
	A lack of trust in institutions and key regulatory processes	13	9.2	11.6	50.0
	Balancing conflicting stakeholder interests	10	7.1	8.9	58.9
	Lack of transparency/lack of clear process	10	7.1	8.9	67.9
	Lack of national energy strategy	10	7.1	8.9	76.8
	Obtaining social licence/buy in from advocacy groups, native and local communities	9	6.4	8.0	84.8
	Cost/funding of project and cost transfer consumer	8	5.7	7.1	92.0
	Aligning projects with public interests /current Canadian values	7	5.0	6.3	98.2
	Addressing NIMBY concerns/safety	2	1.4	1.8	100.0
	Total	112	79.4	100.0	
Missing	No answer	29	20.6		
Total		141	100.0		

Tabulations are based on 141 online responses of energy and environmental leaders between August 15th and October 4th, 2016. No margin of error applies to this research.

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		Frequency	Percent	Valid Percent	Cumulative Percent
Question 2 - What is the number one challenge in terms of environmental stewardship and the energy sector? [Open-ended]	Addressing climate change by reducing greenhouse emissions/Reducing fossil fuel related pollution	41	29.1	36.6	36.6
	A lack of trust in institutions and key regulatory processes/leaders	15	10.6	13.4	50.0
	Lack of clear and consistent regulations and direction on energy standards	13	9.2	11.6	61.6
	Impact on economy	10	7.1	8.9	70.5
	Misinformation and lack of knowledge/understanding energy industries and environmental initiatives	9	6.4	8.0	78.6
	Balancing conflicting stakeholder interests	9	6.4	8.0	86.6
	Challenges related to adopting clean and sustainable energy solutions/technology	9	6.4	8.0	94.6
	Lack of compliance with policy/rules/direction	4	2.8	3.6	98.2
	Other	2	1.4	1.8	100.0
	Total	112	79.4	100.0	
Missing	No answer	29	20.6		
Total		141	100.0		

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2015-739 – Energy Panel – Energy and Environmental Leaders Outreach – STAT SHEET

		Frequency	Percent	Valid Percent	Cumulative Percent
Question 3 - What is the number one challenge in terms of Indigenous communities and the energy sector? [Open-ended]	Engaging Indigenous communities and ensuring equal participation with project development process	41	29.1	38.3	38.3
	Recognition and respect of Indigenous rights/treaty rights	12	8.5	11.2	49.5
	Issues related to access to wealth/economic opportunities in Indigenous communities	12	8.5	11.2	60.7
	Recognition and respect of Indigenous cultural norms	10	7.1	9.3	70.1
	Lack of trust and relationship building between sector and Indigenous communities	8	5.7	7.5	77.6
	Lack of clarity around government and industry responsibilities	7	5.0	6.5	84.1
	Unsure	7	5.0	6.5	90.7
	Ensuring access to sustainable energy	5	3.5	4.7	95.3
	Other	5	3.5	4.7	100.0
	Total	107	75.9	100.0	
Missing	No answer	34	24.1		
Total		141	100.0		

Tabulations are based on 141 online responses of energy and environmental leaders between August 15th and October 4th, 2016. No margin of error applies to this research.

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2015-739 – Energy Panel – Energy and Environmental Leaders Outreach – STAT SHEET

		Frequency	Percent	Valid Percent	Cumulative Percent
Question 4 - What strategies could be used to help strengthen public confidence in energy projects in Canada? [Open-ended]	Increased transparency/clarification for the public	34	24.1	31.2	31.2
	Reassess the methods of regulation and oversight	21	14.9	19.3	50.5
	An environmentally-focused strategy	15	10.6	13.8	64.2
	Partnerships/joint strategy/consultations between stakeholders	14	9.9	12.8	77.1
	Involve an independent third party	9	6.4	8.3	85.3
	Increased research/analysis of the field	8	5.7	7.3	92.7
	A national strategy/policy rather than regional	3	2.1	2.8	95.4
	Improve Indigenous economic/social agency	3	2.1	2.8	98.2
	Unsure	2	1.4	1.8	100.0
	Total	109	77.3	100.0	
Missing	No answer	32	22.7		
Total		141	100.0		

Tabulations are based on 141 online responses of energy and environmental leaders between August 15th and October 4th, 2016. No margin of error applies to this research.

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2015-739 – Energy Panel – Energy and Environmental Leaders Outreach – STAT SHEET

		Responses		
		N	Percent	Percent of Cases
Question 5 - Who would you say are the top five influencers in environmental issues in Canada [Open-ended]	CAPP	3	0.9%	3.4%
	Government / Regulatory Bodies	14	4.1%	15.9%
	Population (i.e., general public)	6	1.7%	6.8%
	Merran Smith (Clean Energy Canada)	1	0.3%	1.1%
	Steve Williams (Suncor)	1	0.3%	1.1%
	Aboriginal groups / Indigenous nations	18	5.2%	20.5%
	US Government	1	0.3%	1.1%
	Environmental groups / ENGOS / Advocates	41	11.9%	46.6%
	Prime Ministers / Premiers / Mayors	13	3.8%	14.8%
	Chris Ragan - Eco Fiscal	3	0.9%	3.4%
	Catherine McKenna	11	3.2%	12.5%
	Justin Trudeau	6	1.7%	6.8%
	Rachel Notley	1	0.3%	1.1%
	Canadian energy sector / Energy companies / Industry	14	4.1%	15.9%
	Federal government	13	3.8%	14.8%
	Provincial governments	7	2.0%	8.0%
	Think Tanks	2	0.6%	2.3%
	Oil and Gas Associations/companies	2	0.6%	2.3%
	Financial Sector/Non-energy companies	1	0.3%	1.1%
	Media/Social media	27	7.8%	30.7%
	Premiers of Energy Producing provinces	2	0.6%	2.3%
	National Post - Terrence Corcoran	1	0.3%	1.1%
	Resource owners	1	0.3%	1.1%
	Politicians	5	1.4%	5.7%
	Socio economic associations	1	0.3%	1.1%
	Pembina Institute	16	4.6%	18.2%
	CEOs	1	0.3%	1.1%

Tabulations are based on 141 online responses of energy and environmental leaders between August 15th and October 4th, 2016. No margin of error applies to this research.

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2015-739 – Energy Panel – Energy and Environmental Leaders Outreach – STAT SHEET

	Responses		
	N	Percent	Percent of Cases
Andrew Leach	1	0.3%	1.1%
Academia / Universities / Scientists / Researchers	17	4.9%	19.3%
Government of Alberta	3	0.9%	3.4%
NRDC	1	0.3%	1.1%
David Suzuki/Suzuki Foundation	27	7.8%	30.7%
Fraser Institute (Marc Jaccard)	3	0.9%	3.4%
Saskatchewan Government	1	0.3%	1.1%
Elizabeth May	4	1.2%	4.5%
Special Interest Groups / Lobbyists	12	3.5%	13.6%
Municipal and local Governments/Federation of Canadian Municipalities	4	1.2%	4.5%
Greenpeace	10	2.9%	11.4%
WWF	5	1.4%	5.7%
Federal Special Advisor to the PMO	3	0.9%	3.4%
Gerald Butts			
Editorial writers/bloggers	3	0.9%	3.4%
Unions	1	0.3%	1.1%
CELA	1	0.3%	1.1%
Tzeporah Berman	8	2.3%	9.1%
Barry Penner	1	0.3%	1.1%
Equiterre	2	0.6%	2.3%
Tides	2	0.6%	2.3%
Rockerfeller	1	0.3%	1.1%
Green Party	2	0.6%	2.3%
Civil society Leaders	1	0.3%	1.1%
Andrew Weaver	1	0.3%	1.1%
Council of Canadians	1	0.3%	1.1%

Tabulations are based on 141 online responses of energy and environmental leaders between August 15th and October 4th, 2016. No margin of error applies to this research.

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2015-739 – Energy Panel – Energy and Environmental Leaders Outreach – STAT SHEET

	Responses		
	N	Percent	Percent of Cases
Marlo Reynolds	2	0.6%	2.3%
UNFCCC	1	0.3%	1.1%
Ontario government	1	0.3%	1.1%
Naomi Klein	2	0.6%	2.3%
Nature Conservancy	2	0.6%	2.3%
Shannon Phillips	1	0.3%	1.1%
Glen Murray	1	0.3%	1.1%
Stewart Elgie	1	0.3%	1.1%
Sustainable Prosperity	4	1.2%	4.5%
Sierra Club of Canada	1	0.3%	1.1%
Mike Hudema	1	0.3%	1.1%
Green Budget Coalition	1	0.3%	1.1%
Total	345	100.0%	392.0%

a. Group

Tabulations are based on 141 online responses of energy and environmental leaders between August 15th and October 4th, 2016. No margin of error applies to this research.

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		Responses		
		N	Percent	Percent of Cases
Question 6 - Who would you say are the top five influencers for energy issues in Canada?	CAPP	15	4.7%	19.2%
	Government / Regulatory Bodies	18	5.7%	23.1%
	Population (i.e., general public)	5	1.6%	6.4%
	Merran Smith (Clean Energy Canada)	5	1.6%	6.4%
	Minister Jim Carr	2	0.6%	2.6%
	Steve Williams (Suncor)	10	3.1%	12.8%
	Murray Edwards (CNRL)	2	0.6%	2.6%
	Sergio Marchi (Canadian Electricity Association)	1	0.3%	1.3%
	Governor of the Bank of Canada	1	0.3%	1.3%
	Aboriginal groups / Indigenous nations	9	2.8%	11.5%
	US Government	1	0.3%	1.3%
	Environmental groups / ENGOS / Advocates	23	7.2%	29.5%
	Prime Ministers / Premiers / Mayors	10	3.1%	12.8%
	Capital Markets	1	0.3%	1.3%
	Jack Gibbons	1	0.3%	1.3%
	Chris Ragan - Eco Fiscal	3	0.9%	3.8%
	Peter Tertzakian	2	0.6%	2.6%
	Catherine McKenna	2	0.6%	2.6%
	Justin Trudeau	6	1.9%	7.7%
	Rachel Notley	7	2.2%	9.0%
	Canadian energy sector / Energy companies / Industry	30	9.4%	38.5%
	Federal government	11	3.5%	14.1%
	Provincial governments	18	5.7%	23.1%
	Think Tanks	6	1.9%	7.7%
	Oil and Gas Associations/companies	9	2.8%	11.5%
	Financial Sector/Non-energy companies	4	1.3%	5.1%

Tabulations are based on 141 online responses of energy and environmental leaders between August 15th and October 4th, 2016. No margin of error applies to this research.

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2015-739 – Energy Panel – Energy and Environmental Leaders Outreach – STAT SHEET

	Responses		
	N	Percent	Percent of Cases
Media/Social media	11	3.5%	14.1%
Premiers of Energy Producing provinces	2	0.6%	2.6%
Globe	1	0.3%	1.3%
National Post - Terrence Corcoran	1	0.3%	1.3%
Politicians	4	1.3%	5.1%
Gwyn Morgan	1	0.3%	1.3%
Brian Lee Crowley	1	0.3%	1.3%
Jack Mintz	1	0.3%	1.3%
Christy Clark	3	0.9%	3.8%
Sean Speer	1	0.3%	1.3%
Socio economic associations	1	0.3%	1.3%
Rex Murphy	1	0.3%	1.3%
Pembina Institute	5	1.6%	6.4%
Investors	3	0.9%	3.8%
Consumers	6	1.9%	7.7%
CEOs	3	0.9%	3.8%
Andrew Leach	3	0.9%	3.8%
University of Calgary - Deborah Yedlin	1	0.3%	1.3%
Academia / Universities / Scientists / Researchers	7	2.2%	9.0%
National Energy Board	4	1.3%	5.1%
Government of Alberta	2	0.6%	2.6%
Natural Resources Canada	1	0.3%	1.3%
David Wheeler	1	0.3%	1.3%
Kathleen Wynne	2	0.6%	2.6%
David Suzuki/Suzuki Foundation	5	1.6%	6.4%
Fraser Institute (Marc Jaccard)	2	0.6%	2.6%
Alberta Government	2	0.6%	2.6%
Saskatchewan Government	2	0.6%	2.6%

Tabulations are based on 141 online responses of energy and environmental leaders between August 15th and October 4th, 2016. No margin of error applies to this research.

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	Responses		
	N	Percent	Percent of Cases
Elizabeth May	1	0.3%	1.3%
Naheed Nenshi	1	0.3%	1.3%
Enbridge	2	0.6%	2.6%
Special Interest Groups / Lobbyists	8	2.5%	10.3%
IEA	1	0.3%	1.3%
Brian Ferguson	1	0.3%	1.3%
Saskatchewan Premier Brad Wall	3	0.9%	3.8%
Tim Egan	1	0.3%	1.3%
Jeff Rubin	1	0.3%	1.3%
Shell	1	0.3%	1.3%
TransCanada	2	0.6%	2.6%
Canadian Vehicle Manufacturers' Association	1	0.3%	1.3%
Hydro Ontario	1	0.3%	1.3%
Municipal and local Governments/Federation of Canadian Municipalities	2	0.6%	2.6%
Chamber of Commerce - Perrin Beatty	2	0.6%	2.6%
Canadian Clean Technology Partnership	1	0.3%	1.3%
Stephen Poloz	1	0.3%	1.3%
Sarah Irving	1	0.3%	1.3%
Calvin Helin	1	0.3%	1.3%
Greenpeace	1	0.3%	1.3%
WWF	3	0.9%	3.8%
Federal Special Advisor to the PMO	2	0.6%	2.6%
Gerald Butts			
Editorial writers/bloggers	1	0.3%	1.3%
Total	318	100.0%	407.7%

a. Group

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