

**POSITIVE
ENERGY**



uOttawa

Richard Ivey School of Business
The University of Western Ontario

IVEY



Woodrow Wilson
International Center
for Scholars





Positive Energy, March 2015

Nik Nanos

Chairman Nanos Research Group of Companies

Research Associate Professor, State University of New York

Global Fellow, Woodrow Wilson International Center for Scholars Washington DC



Consumers as
voters

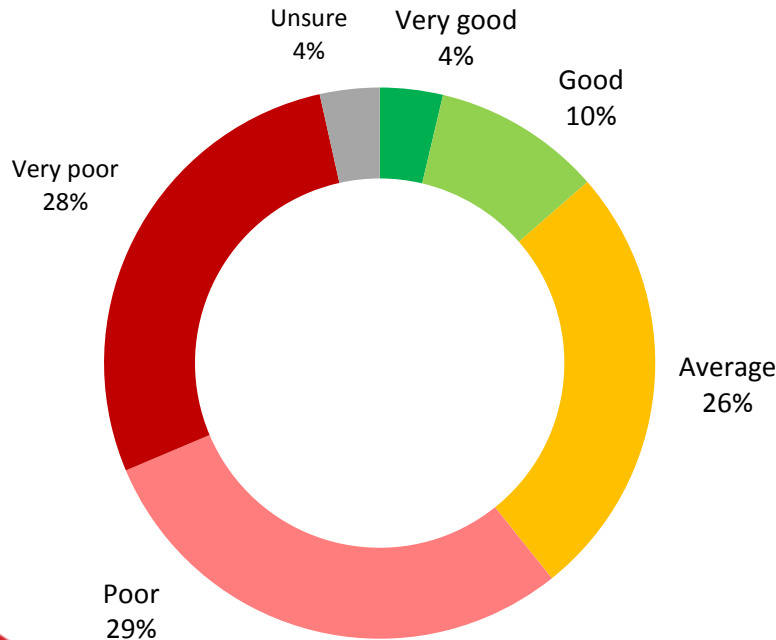
Policy Mind Map

The Folly of our
Energy
Engagement
Strategy



Reducing Greenhouse Gases

Source: Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, February 22nd to 27th, 2015, n=1000, Canadians, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Very good/ Good
Atlantic (n=100)	5.3%
Quebec (n=250)	11.5%
Ontario (n=300)	15.5%
Prairies (n=200)	17.8%
British Columbia (n=150)	12.9%
Male (n=496)	15.4%
Female (n=503)	11.7%
18 to 29 (n=205)	11.4%
30 to 39 (n=169)	17.7%
40 to 49 (n=208)	16.1%
50 to 59 (n=178)	12.2%
60 plus (n=239)	11.2%

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

QUESTION – Do you think Canada does a very good, good, average, poor or very poor job at trying to reduce greenhouse gases?

What is more important



67% Protecting the environment, even with slower growth

24% Growth & jobs even if environment suffers

10% Unsure

Support if GHG targets met



Coal 63% 50%

Oil 69% 67%

Natural Gas 84% 83%

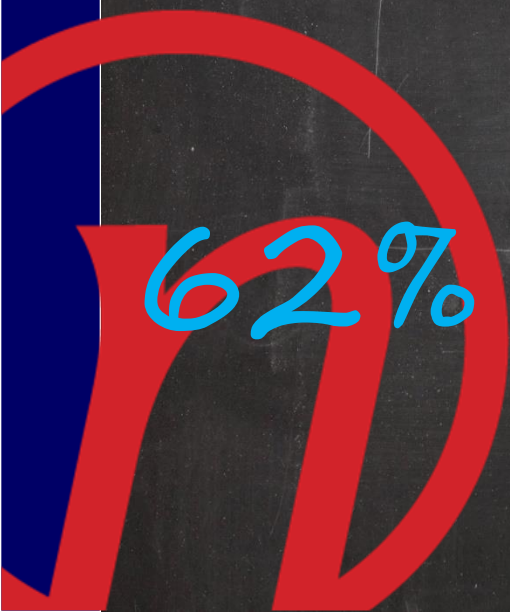


Important to encourage

83% 81% More natural
gas than coal

83% 75% Renewables

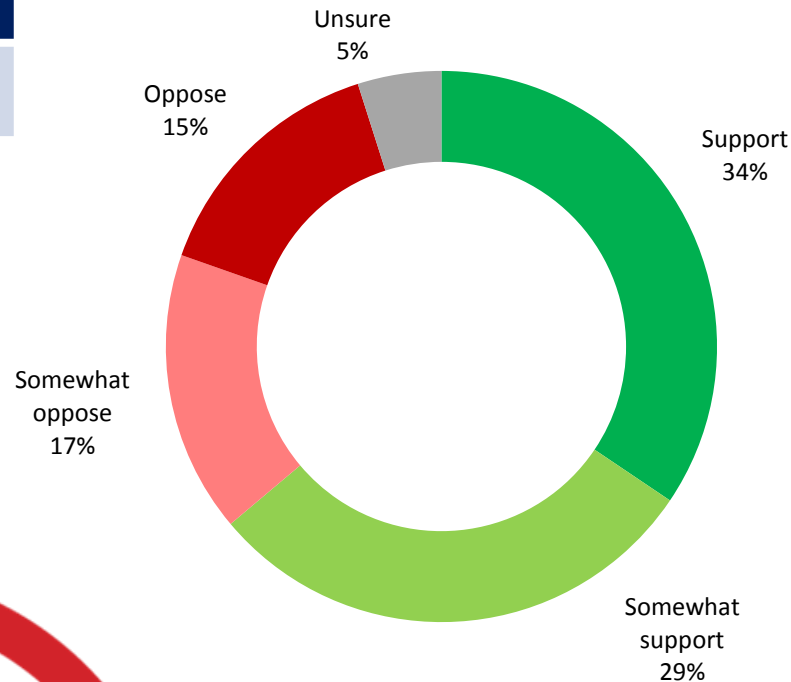
62% 55% Nuclear



Growth of Oil and Gas Sector in Canada

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

Net Score
+32.6



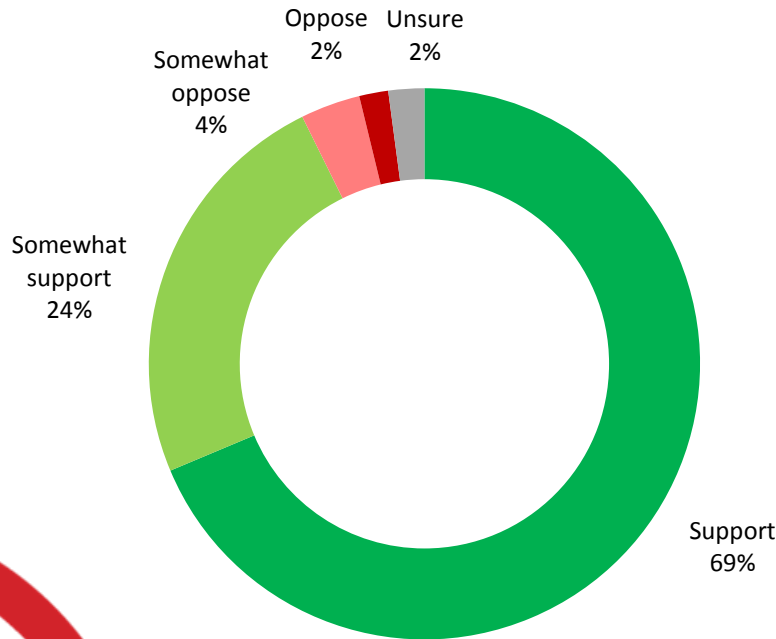
Subgroups	Support/ Somewhat support
Atlantic (n=100)	64.1%
Quebec (n=250)	60.0%
Ontario (n=300)	64.8%
Prairies (n=200)	74.0%
British Columbia (n=150)	55.0%
Male (n=498)	71.5%
Female (n=503)	56.3%
18 to 29 (n=206)	54.1%
30 to 39 (n=169)	60.8%
40 to 49 (n=208)	68.1%
50 to 59 (n=178)	68.8%
60 plus (n=239)	67.1%

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

QUESTION – Do you support, somewhat support, somewhat oppose or oppose growth in the oil and gas sector in Canada?

Growth in the Renewable Energy Sector


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



Subgroups	Support/ Somewhat Support
Atlantic (n=100)	97.2%
Quebec (n=250)	93.7%
Ontario (n=300)	91.2%
Prairies (n=200)	91.9%
British Columbia (n=150)	92.1%
Male (n=498)	93.6%
Female (n=503)	91.7%
18 to 29 (n=206)	93.8%
30 to 39 (n=169)	93.8%
40 to 49 (n=208)	92.2%
50 to 59 (n=178)	91.7%
60 plus (n=239)	92.0%

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

QUESTION – Do you support, somewhat support, somewhat oppose or oppose growth in the renewable energy sector in Canada.

A cartoon by Randy McIlwain. On the left, a homeless man with a long white beard and a winter hat stands in front of a cardboard box. He holds a sign that says "WILL WORK FOR FOOD". On the right, a portly man in a suit and glasses, representing a tax collector, carries a briefcase labeled "TAX MAN". He is pointing at the homeless man. A large speech bubble above the tax collector contains the text: "Just remember, the dessert is mine!". The background shows a wall with several small, illegible signs.

Just remember, the
dessert is mine!

71% New tax on
businesses that
emit GHGs

41% Increasing
taxes on fossil fuels
like gasoline

37% Increasing
taxes on home
heating oil



National interest 51%

Local residents 39%

National interest 49%

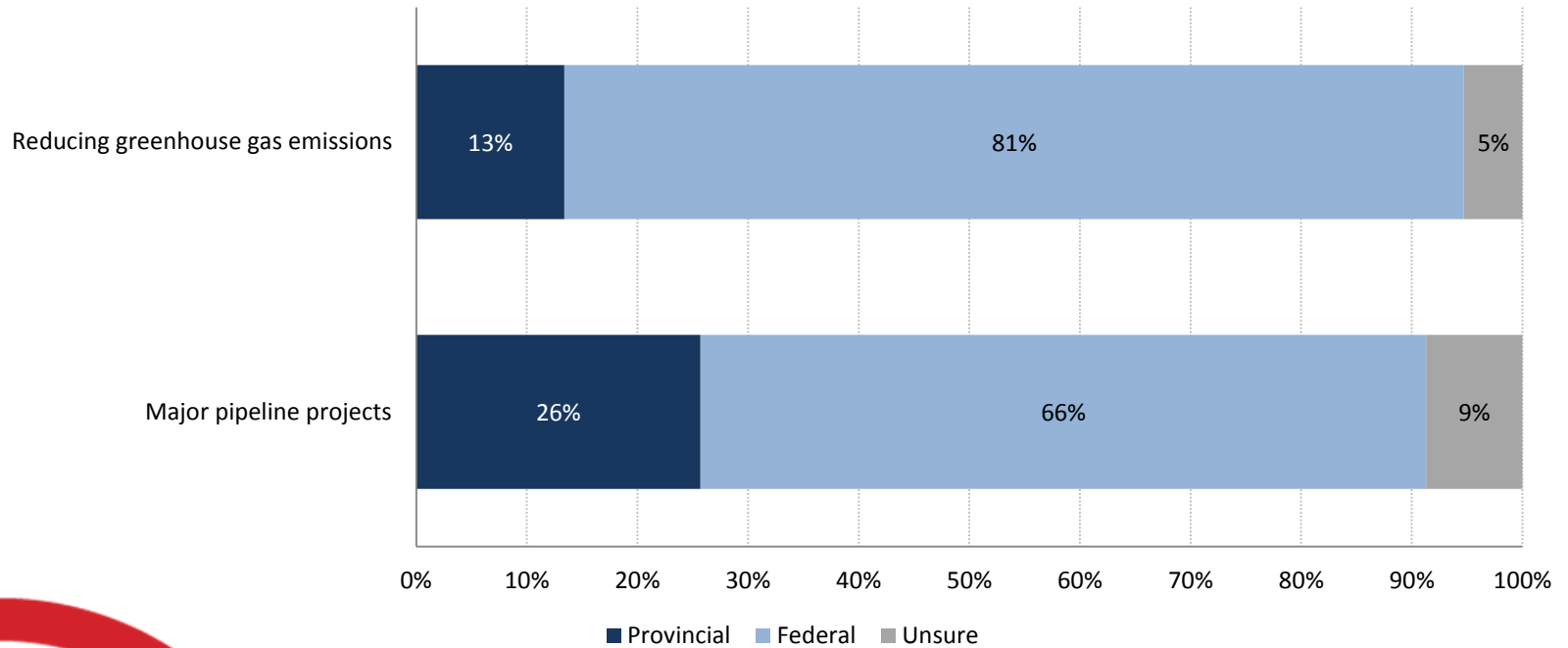
First Nations, Inuit, Metis 40%

National interest 49%

People of province 43%

Leading Decision-Making

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



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

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



Where does energy fit into the policy mind map?

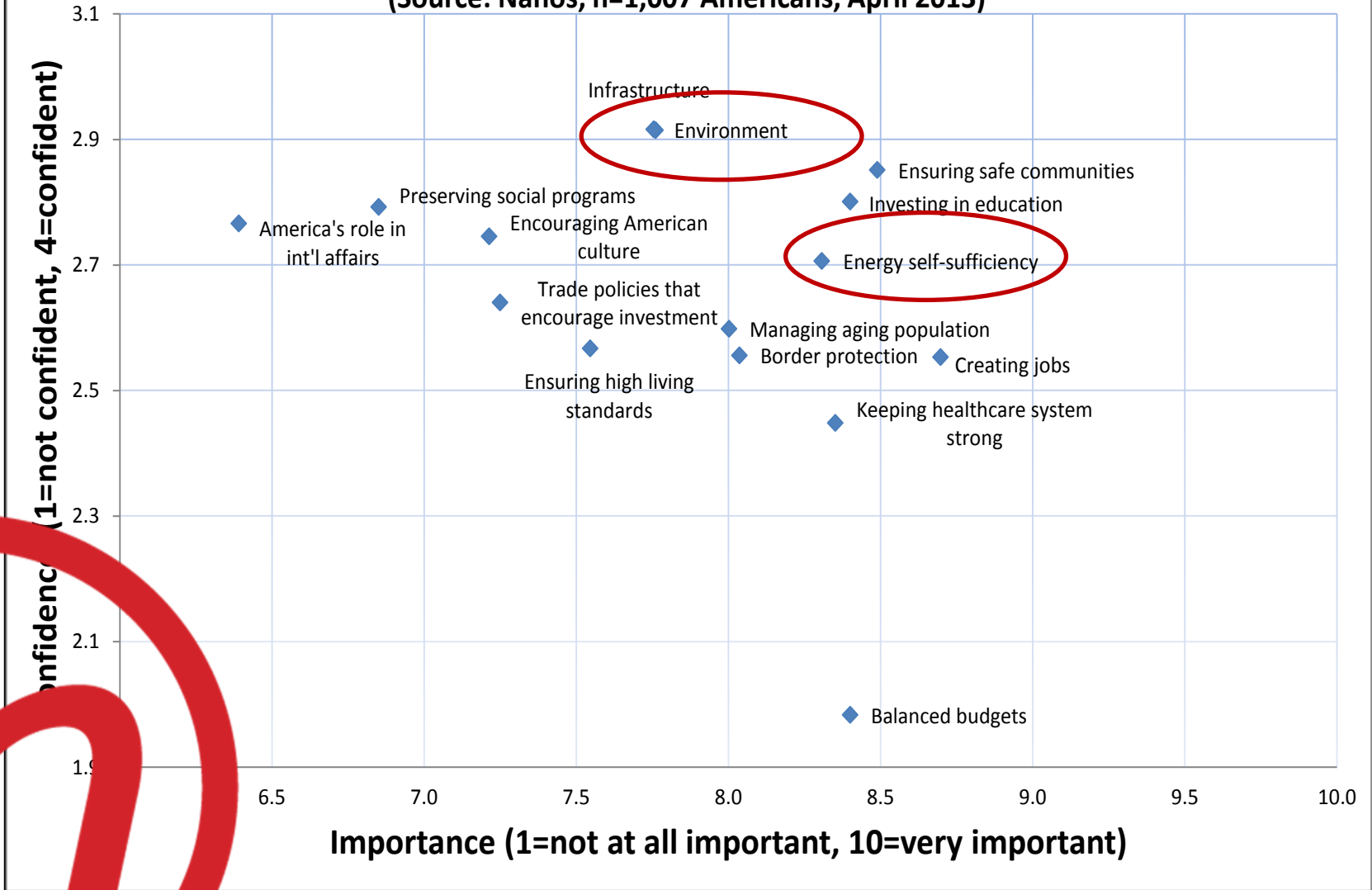
Canadian Confidence vs Importance Map

(Source: Nanos, n=1,003, April 2013)



US Policy Confidence vs Importance Map

(Source: Nanos, n=1,007 Americans, April 2013)





We Can Do It!

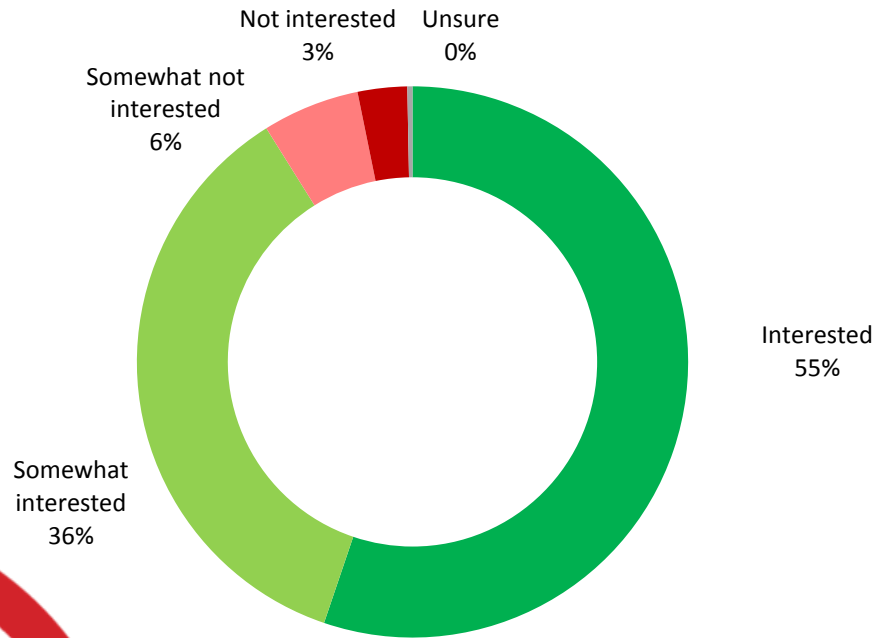
**POSITIVE
ENERGY**



Interest in Energy, Economy and Environment Information

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

Net Score
+82.5



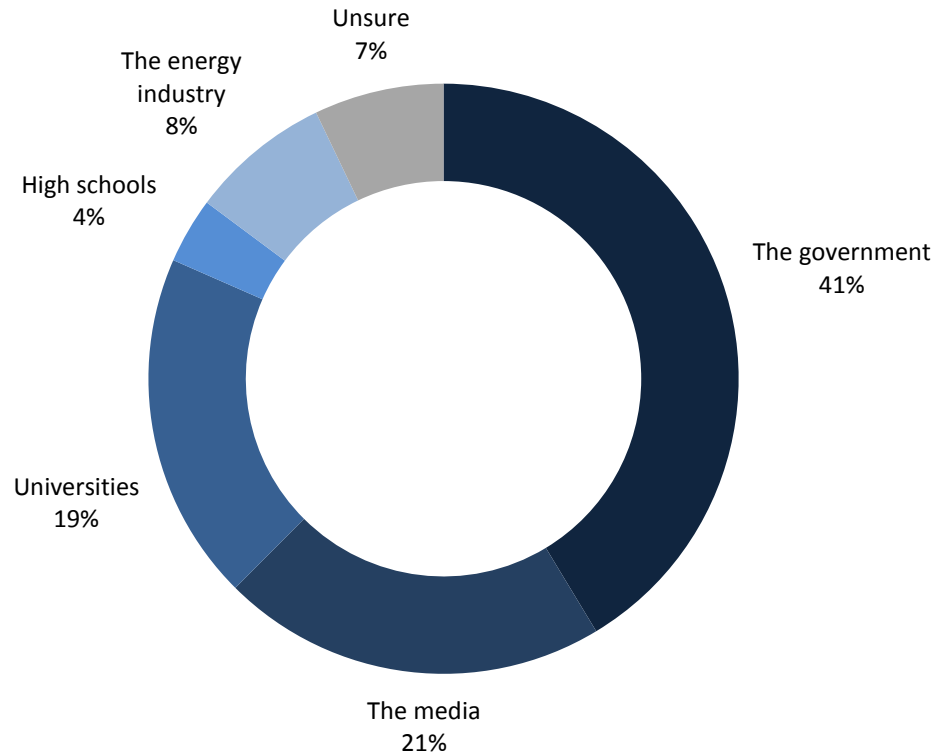
Subgroups	Interested/ Somewhat Interested
Atlantic (n=100)	94.7%
Quebec (n=250)	91.4%
Ontario (n=300)	91.3%
Prairies (n=200)	85.8%
British Columbia (n=150)	95.2%
Male (n=498)	92.4%
Female (n=503)	89.8%
18 to 29 (n=206)	92.2%
30 to 39 (n=169)	87.6%
40 to 49 (n=208)	91.4%
50 to 59 (n=178)	89.8%
60 plus (n=239)	93.5%

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

QUESTION – Would you say that you are interested, somewhat interested, somewhat not interested or not interested in having more information about the relationship between energy, the economy and the environment?

Knowledge About Energy Issues

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

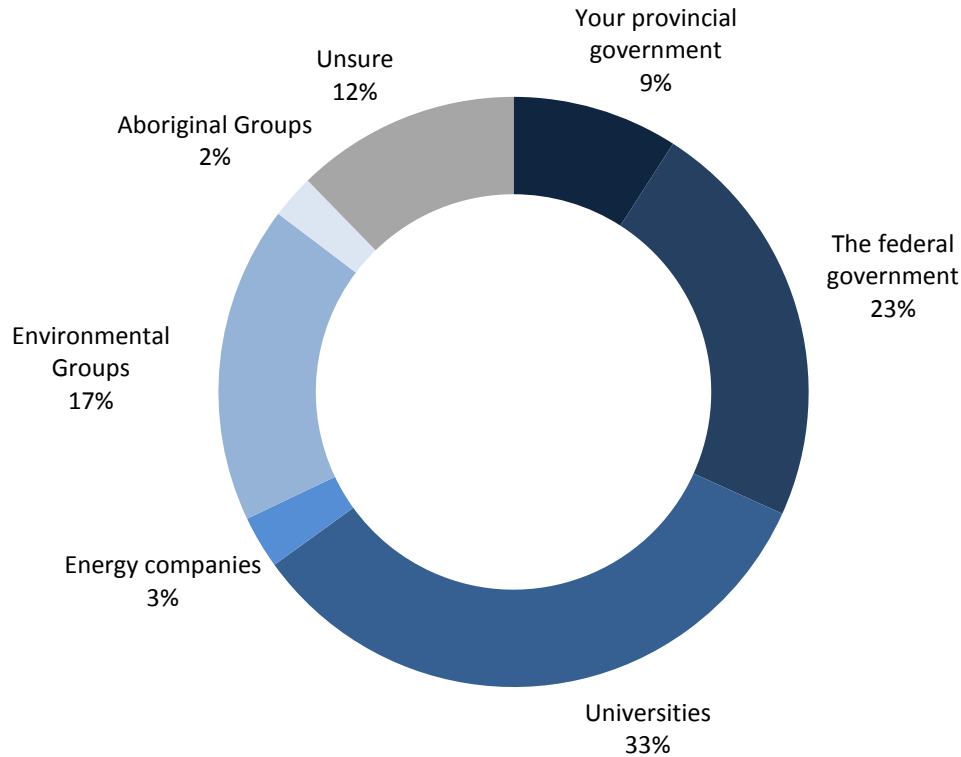


***Note: Charts may not add up to 100 due to rounding**

QUESTION – Who should take the lead in improving people's knowledge about energy issues in Canada. [RANDOMIZE]

Trust in Advancing Responsible Dialogue

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



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

QUESTION – Who would you trust most to advance a responsible dialogue about the economy, the energy sector and the environment [RANDOMIZE]:

The Folly of Energy Engagement

- ☒ Referendum Syndrome
- ☒ Anti-anything
- ☒ Lacking a continental framework that aligns with real energy markets



**KEEP
CALM
AND
PLEASE
DON'T DO
MORE OF THESE**

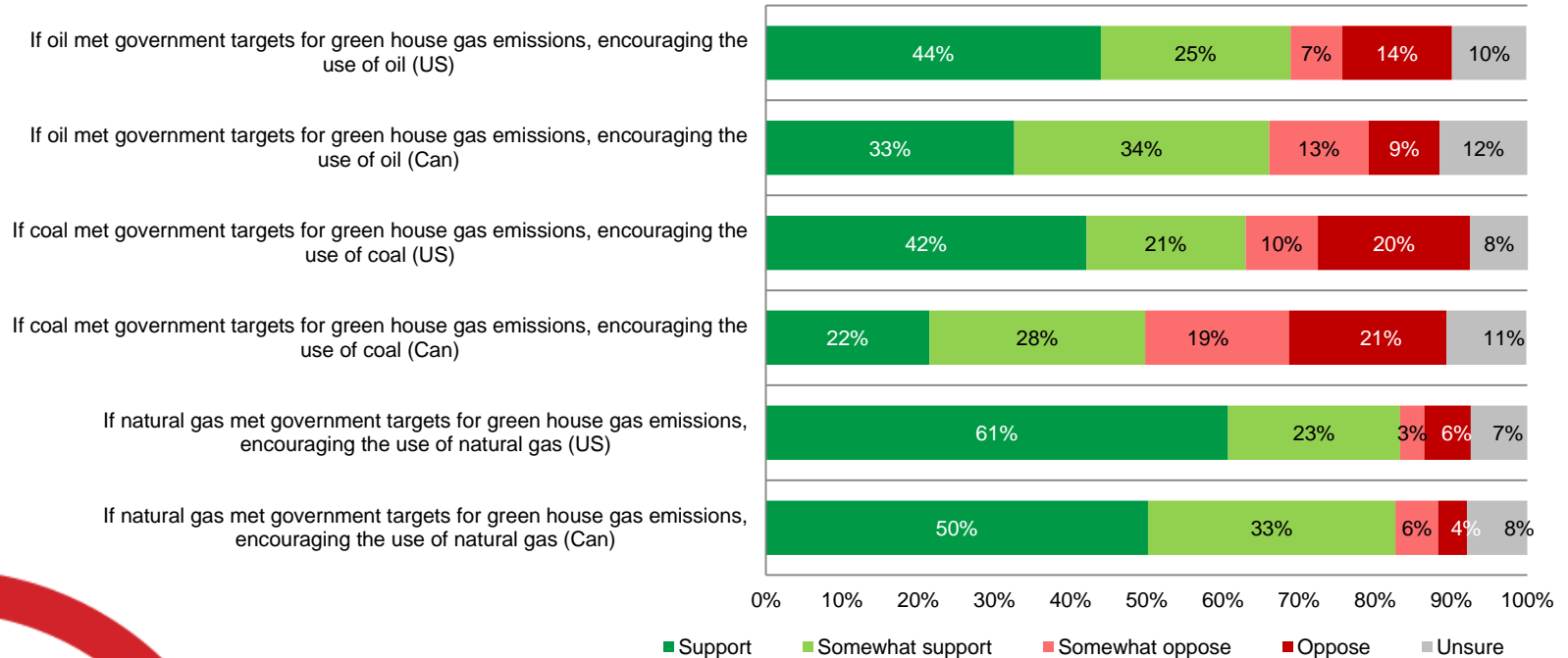
IDEAS

- ☑ Voters are agnostic aspirational consumers of energy conflicted on personal sacrifice
- ☑ Canadians are interested and ready to be engaged
- ☑ Energy needs be cast in terms of choices and environmental stewardship



Encouraging Types of Energy

Source: Nanos Research, Canadian National Telephone Random Survey, April 6 to 9, 2013, n=1,013, accurate 3.1 percentage points plus or minus, 19 times out of 20.
 Source: Nanos Research US National Random Telephone Survey, March 28 to April 7, 2013, n=1,007, accurate 3.1 percentage points, plus or minus, 19 times out of 20.



QUESTION – Would you support, somewhat support, somewhat oppose or oppose the following?