Majority support or somewhat support building natural gas and hydrogen export facilities.

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The research gauged the views and impressions of Canadians on energy policies and investment and Canada's energy future.

Nanos conducted an online non-probability representative survey of 1,237 Canadians, 18 years of age or older, between April 16th and 18th, 2024. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

A margin of error cannot be calculated on a non-probability sample. For comparison purposes, a probability sample of 1,237 respondents would have a margin of error of ±2.8 percentage points, 19 times out of 20.

The research was commissioned by the Macdonald-Laurier Institute (MLI) and the C.D. Howe Institute and was conducted by Nanos Research.

Summary

4

OBJECTIVES

Canadians' views on energy topics at a Glance

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Investment

1

A majority of Canadians support (29%) or somewhat support (36%) building Canada's first natural gas export facilities or building new export facilities so Canada can export low carbon hydrogen to other countries (28% support; 41% somewhat support).

Overall, Canadians give mediocre scores on the job Canada does of approving new energy projects (mean of 5.5 out of 10), making sure the energy infrastructure that will be needed in the future is built (mean of 5.4), and ensuring transportation infrastructure is built (mean of 5.6).

Canadians are more likely to say rules and regulations in Canada have a neutral impact on the ability to complete energy development projects in a timely manner (34%) rather than a positive impact (28%) or a negative impact (20%)(mean score of 5.3 out of 10).

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2

Opportunity

Canadians are more likely to say the Government of Canada does a good job (31%) rather than a poor job (22%) at consulting with Indigenous Peoples for energy projects (mean of 5.2 out of 10).

Most Canadians say consulting with Indigenous Peoples when developing policies is important (38%) or somewhat important (41%) and they are four times more likely to say Indigenous Peoples should have a major role (36%) rather than no role (nine per cent) in informing energy policy in Canada.

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3

How – Path forward

Canadians are almost four times more likely to oppose (37%) rather than support (10%) the recent federal increase in the carbon tax.

Residents of Quebec are less likely to oppose or somewhat oppose this increase (37%) than Canadians in general (55%).

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Speed

4

Canadians are split on the amount of decision-making power the federal government should have on the approval of energy projects, with close to one in three saying it has the right amount (31%) and around one in four each who say it has too little (26%) or too much power (22%).

Regarding ensuring energy is affordable, Canadians are more likely to say the federal government is doing a poor job (36%) than a good job (27%) at this (mean score of 4.5 out of 10). They are divided on the job the government is doing at meeting climate change targets, with around one in four each who say the government is doing a good job (28%) or a poor job (24%)(mean score of 5.1 out of 10).

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Issues ranking

Q – Please rank the following issues in order of importance where 1 is the most important issue for you, 2 the second most important and 3 the third most important. [RANDOMIZE]

> **Cost of living/inflation (housing, groceries, energy bills)**
(49.3% first rank; 22.9% second rank)

> **Health/healthcare**
(19.6% first rank; 27.7% second rank)

> **The environment/climate change**
(8.8% first rank; 9.7% second rank)

> **Economic issues (Jobs and the economy)**
(7.7% first rank; 17.3% second rank)

> **Fiscal issues (Taxes and debt)**
(4.1% first rank; 8.3% second rank)

> **Education**
(4.3% first rank; 6.2% second rank)

> **Immigration**
(3.5% first rank; 5.2% second rank)

> **Defense spending**
(1.6% first rank; 2.1% second rank)

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Theme 1 Opportunity

Government of Canada's job at consulting with Indigenous Peoples when it comes to energy projects
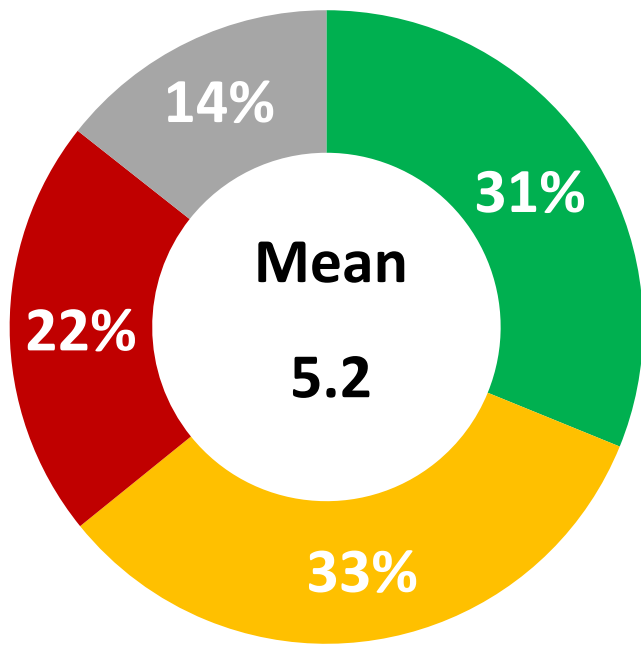
Mean

5.2

31%

33%

22%

14%

- ■ Good job (7-10)
- ■ Neutral (4-6)
- ■ Poor job (0-3)
- ■ Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

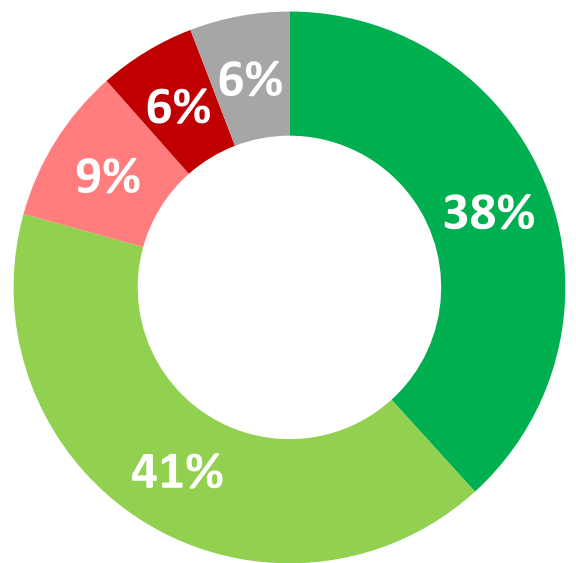| Mean	Atlantic (n=124)	Quebec (n=301)	Ontario (n=363)	Prairies (n=261)	BC (n=188)
	5.4	5.2	5.2	5.0	5.7
	Men (n=612)	Women (n=620)	18 to 34 (n=333)	35 to 54 (n=489)	55 plus (n=415)
	5.3	5.1	5.3	5.2	5.2

Q – On a scale from 0 to 10 where 0 is very poor job and 10 a very good job, what kind of job do you think the Government of Canada is doing at consulting with Indigenous Peoples when it comes to energy projects?

Source: Nanos Research, online representative panel survey, April 16th to 18th, 2024, n=1237.

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Importance of consulting with Indigenous Peoples when developing energy development policies

Q – Do you think it is important, somewhat important, somewhat not important or not important that the Government of Canada consults with Indigenous Peoples when developing energy development policies?

38%

41%

9%

6%

6%

- 🟩 Important
- 🟩 Somewhat important
- 🟥 Somewhat not important
- 🟥 Not important
- ⬜ Unsure

Important/ Somewhat important	Atlantic (n=124)	Quebec (n=301)	Ontario (n=363)	Prairies (n=261)	BC (n=188)
	69.1%	78.0%	84.4%	78.8%	72.7%
	Men (n=612)	Women (n=620)	18 to 34 (n=333)	35 to 54 (n=489)	55 plus (n=415)
	77.8%	80.7%	83.0%	75.5%	79.8%

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, online representative panel survey, April 16th to 18th, 2024, n=1237.

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Role Indigenous Peoples should play in informing energy policies in Canada
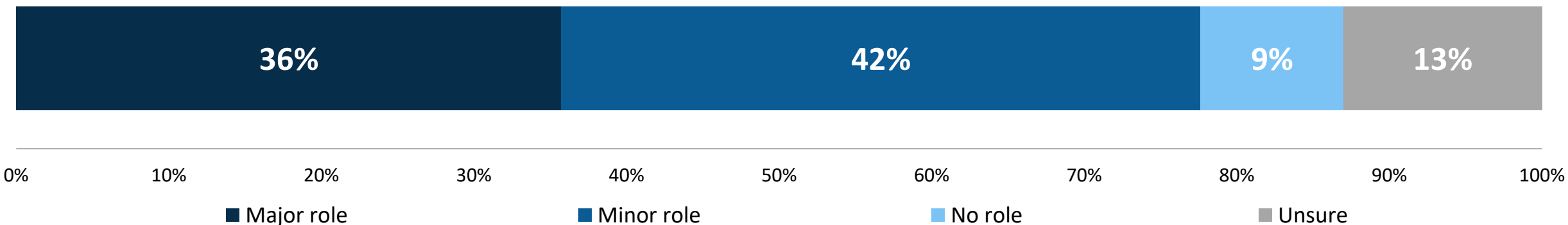
| 36% | 42% | 9% | 13% |

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%

■ Major role   ■ Minor role   ■ No role   ■ Unsure

	Total (n=1237)	Atlantic (n=124)	Quebec (n=301)	Ontario (n=363)	Prairies (n=261)	BC (n=188)	Men (n=612)	Women (n=620)	18 to 34 (n=333)	35 to 54 (n=489)	55 plus (n=415)
Major role	35.7%	29.6%	38.6%	39.3%	32.7%	28.0%	33.6%	37.8%	41.1%	35.6%	32.3%
Minor role	41.9%	37.0%	37.9%	42.2%	44.1%	47.2%	45.6%	38.1%	39.4%	40.4%	44.7%
No role	9.4%	15.0%	8.7%	6.8%	10.3%	13.5%	11.5%	7.4%	7.0%	10.8%	9.8%

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Q – Do you believe that Indigenous Peoples should play a major, minor or no role in informing energy policies in Canada?

Source: Nanos Research, online representative panel survey, April 16th to 18th, 2024, n=1237.

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Ways to improve relationship with Indigenous Peoples in terms of energy development policies

Q – What can the Government of Canada do to foster a more inclusive and meaningful relationship with Indigenous Peoples in terms of energy development policies? [OPEN]

TOP RESPONSES

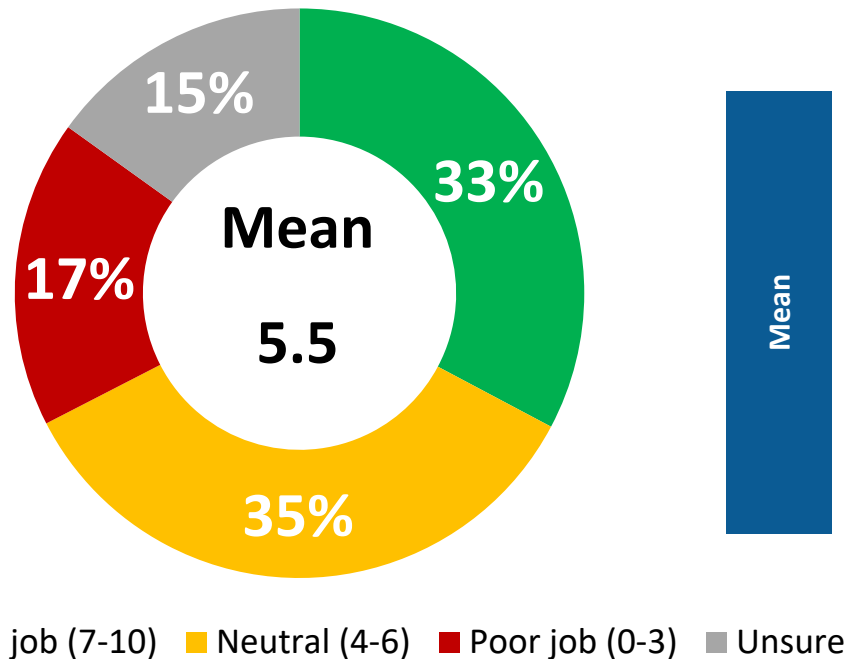|	Frequency (n=1064)
Consult them/listen to them/engage them	31.2%
Nothing/they do enough	8.1%
More communication from the beginning/transparency/honesty	6.5%
Be respectful/inclusive/build a relationship	5.2%
Treat them the same as all Canadians/all equals	5.0%
Give them more representation in the government	4.5%
Help them (give them their land/clean water/education/homes)	3.2%
Unsure	17.1%

Source: Nanos Research, online representative panel survey, April 16th to 18th, 2024, n=1064.

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Theme 2 Investment

Canada's job at approving new energy projects

Q – On a scale of 0 to 10 where 0 is very poor and 10 is very good, how would you rate the job Canada has done at **approving new energy projects** like hydroelectric dams, pipelines, wind/solar farms and gas export facilities?
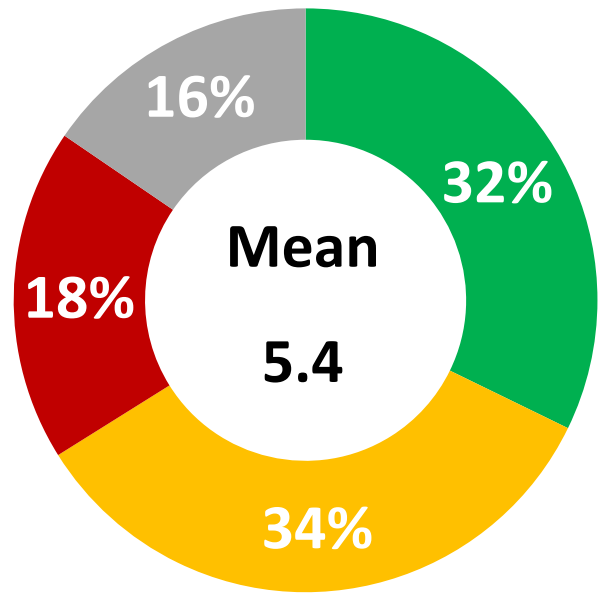
Mean 5.5

- 33% Good job (7-10)
- 35% Neutral (4-6)
- 17% Poor job (0-3)
- 15% Unsure

Mean	Atlantic (n=124)	Quebec (n=301)	Ontario (n=363)	Prairies (n=261)	BC (n=188)
	5.7	5.7	5.5	4.9	5.5
	Men (n=612)	Women (n=620)	18 to 34 (n=333)	35 to 54 (n=489)	55 plus (n=415)
	5.5	5.5	6.0	5.5	5.0

■ Good job (7-10) ■ Neutral (4-6) ■ Poor job (0-3) ■ Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, online representative panel survey, April 16th to 18th, 2024, n=1237.

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Canada's job at building energy infrastructure needed in the future

Mean 5.4

- Good job (7-10)
- Neutral (4-6)
- Poor job (0-3)
- Unsure

32% / 34% / 18% / 16%

	Atlantic (n=124)	Quebec (n=301)	Ontario (n=363)	Prairies (n=261)	BC (n=188)
Mean	5.5	5.7	5.6	4.8	5.2
	Men (n=612)	Women (n=620)	18 to 34 (n=333)	35 to 54 (n=489)	55 plus (n=415)
	5.4	5.5	5.9	5.5	5.0

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Q – On a scale of 0 to 10 where 0 is very poor and 10 is very good, how would you rate the job Canada has done **making sure we will build the energy infrastructure** that will generate the energy we will need in the future?

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Reason for impression of Canada's job at building energy infrastructure needed in the future

32% of Canadians who say good job (7-10)

- **32% say** Canada is making a great effort/heading in the right direction
- **16% say** They can do more/haven't done enough/average
- **9% say** It is important they do/will help people/Good for the future
- **7% say** My opinion/ from what I've seen/read
- **6% say** Canada is ill equipped/unprepared to handle energy needs/We need a long-term energy plan
- **6% say** Update infrastructure/be open to new technology or forms of energy production

18% of Canadians who say poor job (0-3)

- **22% say** Government is slow/incompetent/do not care
- **19% say** They can do more/haven't done enough/average
- **14% say** Canada is ill equipped/unprepared to handle energy needs/We need a long-term energy plan
- **9% say** Update infrastructure/be open to new technology or forms of energy production
- **7% say** Rising cost of energy/additional Carbon taxes/unaffordable
- **7% say** More focused on money/power

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Canada's job at ensuring transportation infrastructure

Q – On a scale of 0 to 10 where 0 is very poor and 10 is very good, how would you rate the job Canada has done **making sure we have the transportation infrastructure** like roads, rail, airports and ports that we will need in the future?
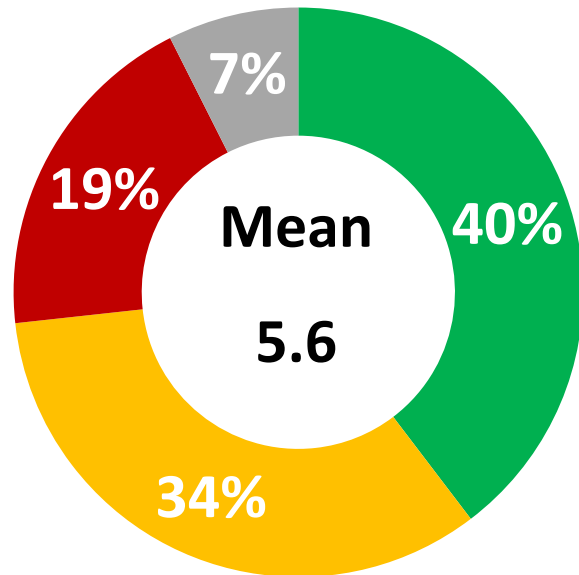
Mean 5.6

- Good job (7-10): 40%
- Neutral (4-6): 34%
- Poor job (0-3): 19%
- Unsure: 7%

Mean	Atlantic (n=124)	Quebec (n=301)	Ontario (n=363)	Prairies (n=261)	BC (n=188)
	5.6	5.6	5.7	5.5	5.6
	Men (n=612)	Women (n=620)	18 to 34 (n=333)	35 to 54 (n=489)	55 plus (n=415)
	5.6	5.7	6.0	5.7	5.3

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, online representative panel survey, April 16th to 18th, 2024, n=1237.

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Impact of rules and regulations on completing energy development projects

Mean 5.3

- 🟩 Positive impact (7-10)
- 🟨 Neutral (4-6)
- 🟥 Negative impact (0-3)
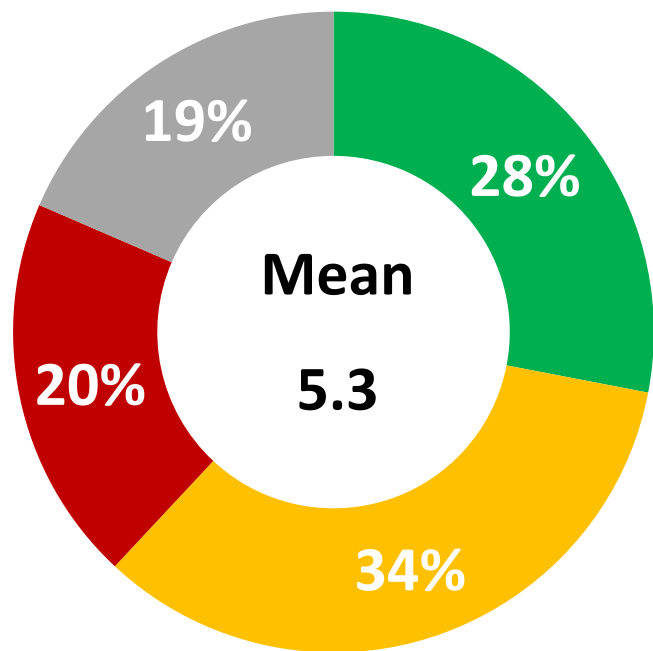- ⬜ Unsure

28%
34%
20%
19%

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Mean	Atlantic (n=124)	Quebec (n=301)	Ontario (n=363)	Prairies (n=261)	BC (n=188)
	5.4	5.5	5.5	4.9	5.2
	Men (n=612)	Women (n=620)	18 to 34 (n=333)	35 to 54 (n=489)	55 plus (n=415)
	5.2	5.5	5.9	5.4	4.8

Q – On a scale from 0 to 10 where 0 is a very negative impact and 10 is a very positive impact, what impact do you think rules and regulations in Canada have on the ability to complete energy development projects in a timely manner?
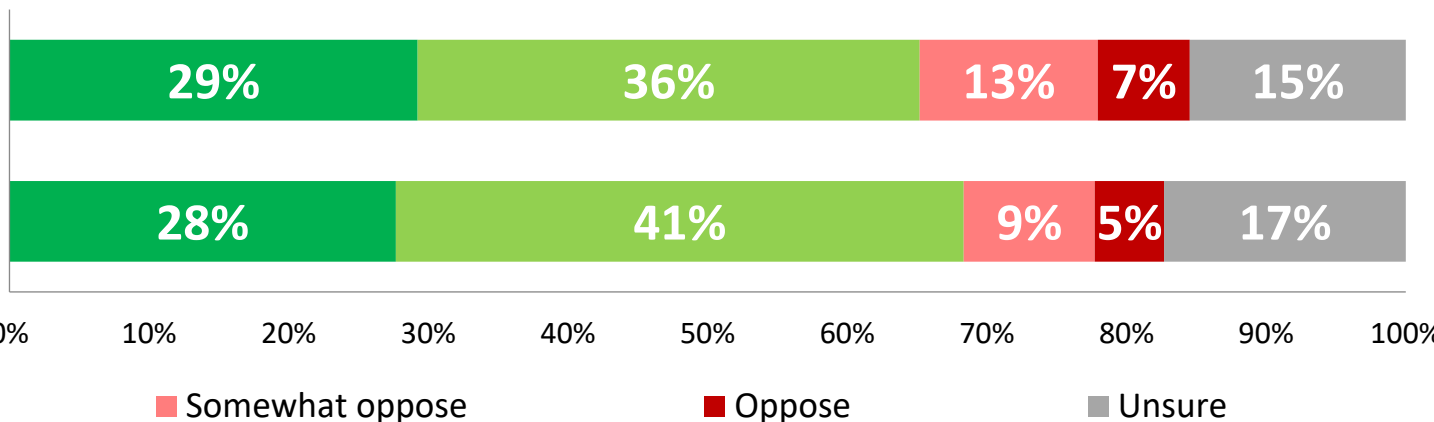
Source: Nanos Research, online representative panel survey, April 16th to 18th, 2024, n=1237.

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Support for building energy facilities

Building Canada's first natural gas export facilities in order to expand its exports of natural gas to other countries

29%	36%	13%	7%	15%

Building new export facilities so Canada can export low carbon hydrogen to other countries

28%	41%	9%	5%	17%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Support   ■ Somewhat support   ■ Somewhat oppose   ■ Oppose   ■ Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

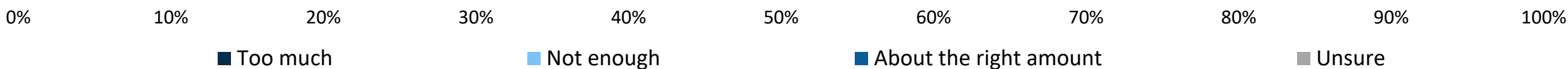|		Total (n=1237)	Atlantic (n=124)	Quebec (n=301)	Ontario (n=363)	Prairies (n=261)	BC (n=188)	Men (n=612)	Women (n=620)	18 to 34 (n=333)	35 to 54 (n=489)	55 plus (n=415)
Support/ Somewhat support	Building Canada's first natural gas export facilities in order to expand its exports of natural gas to other countries	65.2%	63.1%	49.4%	68.9%	77.1%	67.1%	71.7%	59.3%	65.0%	65.5%	65.1%
	Building new export facilities so Canada can export low carbon hydrogen to other countries	68.3%	60.4%	60.8%	71.7%	72.7%	69.7%	74.2%	63.0%	70.5%	66.6%	68.3%

Q – Would you support, somewhat support, somewhat oppose or oppose the following: [RANDOMIZE]

Source: Nanos Research, online representative panel survey, April 16th to 18th, 2024, n=1237.

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Theme 3 Speed

Amount of decision-making power of federal government vs provincial governments on approval of energy projects

22%	26%	31%	21%

0%   10%   20%   30%   40%   50%   60%   70%   80%   90%   100%

■ Too much   ■ Not enough   ■ About the right amount   ■ Unsure

	Total (n=1237)	Atlantic (n=124)	Quebec (n=301)	Ontario (n=363)	Prairies (n=261)	BC (n=188)	Men (n=612)	Women (n=620)	18 to 34 (n=333)	35 to 54 (n=489)	55 plus (n=415)
Too much	22.0%	20.7%	21.0%	17.3%	31.7%	25.3%	23.8%	20.3%	18.4%	21.5%	24.8%
Not enough	25.6%	22.4%	24.5%	27.3%	23.8%	26.4%	27.7%	23.7%	29.8%	23.2%	24.7%
About the right amount	31.5%	30.4%	30.6%	34.7%	28.0%	28.7%	33.3%	30.0%	35.1%	35.1%	26.3%

*Weighted to the true population proportion.
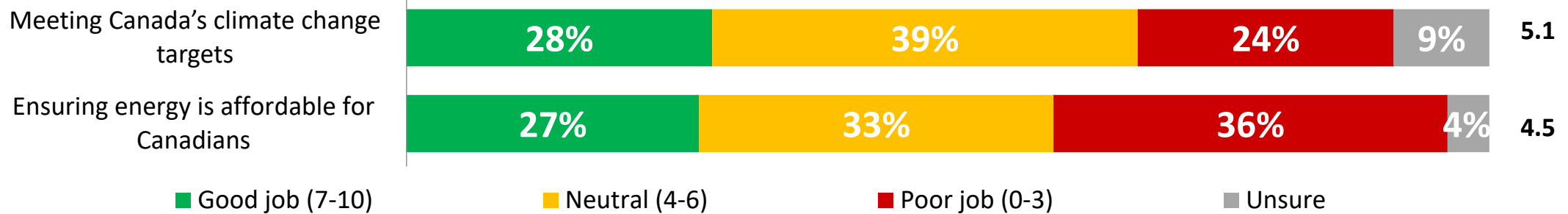*Charts may not add up to 100 due to rounding.

Q – Do you believe the federal government has too much, not enough or about the right amount of decision-making power over provincial/territorial governments when it comes to the approval of energy projects?

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Government job at ensuring affordable energy and meeting climate change targets

Q – On a scale from 0 to 10 where 0 is very poor job and 10 a very good job, what kind of job do you think the federal government does at the following: [ROTATE]

Mean

Meeting Canada's climate change targets	28%	39%	24%	9%	5.1
Ensuring energy is affordable for Canadians	27%	33%	36%	4%	4.5

■ Good job (7-10)   ■ Neutral (4-6)   ■ Poor job (0-3)   ■ Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Affordable energy - Mean score	Atlantic (n=124)	Quebec (n=301)	Ontario (n=363)	Prairies (n=261)	BC (n=188)
	3.8	5.0	4.7	3.8	4.2
	Men (n=612)	Women (n=620)	18 to 34 (n=333)	35 to 54 (n=489)	55 plus (n=415)
	4.5	4.5	5.2	4.3	4.1

Meeting climate change targets – Mean score	Atlantic (n=124)	Quebec (n=301)	Ontario (n=363)	Prairies (n=261)	BC (n=188)
	4.9	4.9	5.3	4.9	4.9
	Men (n=612)	Women (n=620)	18 to 34 (n=333)	35 to 54 (n=489)	55 plus (n=415)
	5.1	5.0	5.3	5.1	4.8

Source: Nanos Research, online representative panel survey, April 16th to 18th, 2024, n=1237.

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Theme 4 How – Path Forward

Level of support about the recent increase in the Carbon Tax
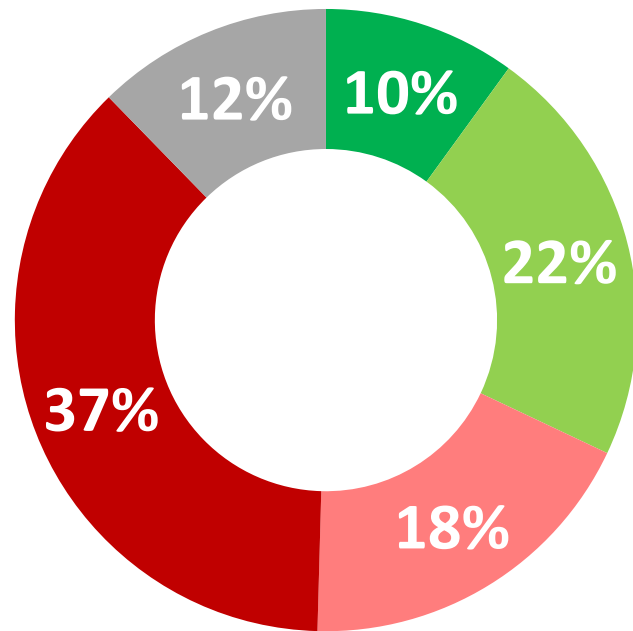
Support/Somewhat support	Atlantic (n=124)	Quebec (n=301)	Ontario (n=363)	Prairies (n=261)	BC (n=188)
	19.6%	36.7%	35.1%	28.9%	25.8%
	Men (n=612)	Women (n=620)	18 to 34 (n=333)	35 to 54 (n=489)	55 plus (n=415)
	34.3%	29.6%	34.9%	31.1%	30.9%

Oppose/Somewhat oppose	Atlantic (n=124)	Quebec (n=301)	Ontario (n=363)	Prairies (n=261)	BC (n=188)
	65.1%	46.6%	54.8%	59.5%	63.9%
	Men (n=612)	Women (n=620)	18 to 34 (n=333)	35 to 54 (n=489)	55 plus (n=415)
	56.8%	54.9%	52.6%	58.0%	55.8%

■ Support   ■ Somewhat support
■ Somewhat oppose   ■ Oppose
■ Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Q – Do you support, somewhat support, somewhat oppose or oppose the recent federal increase in the Carbon Tax?

Source: Nanos Research, online representative panel survey, April 16th to 18th, 2024, n=1237.

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Nanos conducted an online non-probability representative survey of 1,237 Canadians, 18 years of age or older, between April 16th and 18th, 2024.

The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

A margin of error cannot be calculated on a non-probability sample. For comparison purposes, a probability sample of 1,237 respondents would have a margin of error of ±2.8 percentage points, 19 times out of 20.

The research was commissioned by the Macdonald-Laurier Institute (MLI) and the C.D. Howe Institute and was conducted by Nanos Research.

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

METHODOLOGY

Element	Description
Research sponsor	The Macdonald-Laurier Institute (MLI) and the C.D. Howe Institute
Population and Final Sample Size	1237 Canadians
Source of Sample	Innovate
Type of Sample	Representative online non-probability sample
Margin of Error	A margin of error cannot be calculated on a non-probability sample. For comparison purposes, a probability sample of 1,237 respondents would have a margin of error of ±2.8 percentage points, 19 times out of 20.
Mode of Survey	online representative panel survey
Sampling Method Base	Non-probability.
Demographics (Captured)	Atlantic, Quebec, Ontario, Prairies and BC ; Men and Women; 18 years or older. Six-digit postal code was used to validate geography.
Demographics (Other)	Age, gender, education, income
Field Dates	April 16th to 18th, 2024.
Language of Survey	The survey was conducted in both English and French.
Standards	Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. https://canadianresearchinsightscouncil.ca/standards/

Element	Description
Weighting of Data	The results were weighted by age and gender using the latest Census information (2021) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure.
Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Excluded Demographics	Individuals younger than 18 years old; individuals without internet access could not participate.
Stratification	By age and gender using the latest Census information (2021) and the sample is geographically stratified to be representative of Canada.
Estimated Response Rate	Not applicable
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.
Research/Data Collection Supplier	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.
Data Tables	By region, age and gender: Data tables

TECHNICAL NOTE

As one of North America's premier market and public opinion research firms, we put strategic intelligence into the hands of decision makers. The majority of our work is for private sector and public facing organizations and ranges from market studies, managing reputation through to leveraging data intelligence.   Nanos Research offers a vertically integrated full service quantitative and qualitative research practice to attain the highest standards and the greatest control over the research process. www.nanos.co

This international joint venture between dimap and Nanos 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. www.nanosdimap.com

Ethic Strategies was created by the founding partners of PAA Advisory and the Nanos Research Corporation, both recognized leaders in research, advocacy, and advisory. Ethic provides bespoke strategic counsel, advice, and communications strategies to organizations facing serious issues. www.ethicstrategies.com

ABOUT NANOS

Any questions?

✉

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