


Canadians tilt toward non-partisanship on energy decisions; Academics and industry experts top list to inform decision-making.



The research gauged public perceptions and opinions regarding the balance between political influence and expert advice in policy decisions, the role of various sources in informing these decisions, and the role of oil and gas in Canada's current and future economy. It explored views on expanding oil and gas exports for global energy security and climate change mitigation. Additionally, the survey asks Canadians to score government performance on strengthening public confidence in Canada's energy decision-making processes and on developing a shared long-term vision for Canada's energy future.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,035 Canadians, 18 years of age or older, between July 29th to August 1st, 2024 as part of an omnibus survey.

The margin of error for a random survey of 1,035 Canadians is ± 3.1 percentage points, 19 times out of 20.

The research was commissioned by the University of Ottawa's Positive Energy program and was conducted by Nanos Research.

KEY FINDINGS

1

CANADIANS MORE LIKELY TO PREFER ENERGY AND ENVIRONMENTAL POLICY DECISIONS BE INFLUENCED BY ADVICE FROM THE NON-PARTISAN PUBLIC SERVICE THAN BY THE POLITICS OF THE GOVERNMENT OF THE DAY

Two in five Canadians (40%) say that energy decisions should be influenced by the advice received from the non-partisan public service (score of 0-3 out of 10), while under two in five are for a balanced approach (36%), and over one in ten prefer the politics of the government in power (14%), for a total mean score of 3.9. When asked the reason for their opinion, the top response was 'Government bias/Politics getting in the way/Politicians are not experts' (27%) followed by 'Ask experts in the field/Science-based evidence and facts/Independent sources' (13%).

2

CANADIANS PREFER ACADEMIC AND INDUSTRY INSIGHTS FOR ADVICE ON ENERGY POLICY DECISIONS

When asked to give a percentage on where the government should seek guidance on energy policy in Canada, the highest percentage was given on average to 'Academia (Universities, Peer-reviewed science, researchers)' (18%) and 'Industry experts/business' (17%). Canadians were also asked for the reasons behind their choices, with the top responses being 'More broad input/all interested parties should have a say/balance' (27%) and 'Decisions should be based on science/research/university/academia' (19%).

3

CANADA'S PERFORMANCE POORLY RATED IN BUILDING PUBLIC CONFIDENCE IN ENERGY DECISION MAKING AND DEVELOPING A SHARED LONG-TERM VISION FOR CANADA'S ENERGY FUTURE

A majority of Canadians say that Canada is performing poorly in building public confidence in energy decision-making (28% very poor and 33% poor) and in developing a shared long-term vision for Canada's energy future (28% very poor and 31% poor), which is consistent with previous waves.

4

OIL AND GAS SEEN AS HIGHLY IMPORTANT TO CANADA'S CURRENT ECONOMY

About four in five Canadians rate oil and gas as important to Canada's current economy (score of 7-10 out of 10) (79%) which is an increase from the previous wave in January 2024 (74%). When asked the reason for their opinion, the top reason is 'Contributes/tied to Canadian/provincial economy, exports, jobs' (28%) followed by 'Oil and gas are important Canadian natural resources/we have a lot of it/produce it', with Canadians being three times more likely to mention this compared to the previous wave (13%; 4% in January 2024).

5

OIL AND GAS REMAIN IMPORTANT TO CANADA'S FUTURE ECONOMY

About three in five Canadians view oil and gas as important to Canada's future economy (score of 7 to 10 out of 10) (59%). When asked about the reasons for their rating, the primary response is 'Moving towards clean energy/reducing reliance on fossil fuels', this showed a substantial rise from January 2024 (31%; 24% in January 2024). This is followed by 'Remain a large part of Canada's economy/still contributing to Canada's economy', which has also increased from the previous wave (20%; 13% in January 2024).

6

MAJORITY OF CANADIANS AGREE OR SOMEWHAT AGREE ON EXPANDING OIL AND GAS EXPORTS FOR SECURITY AND CLIMATE

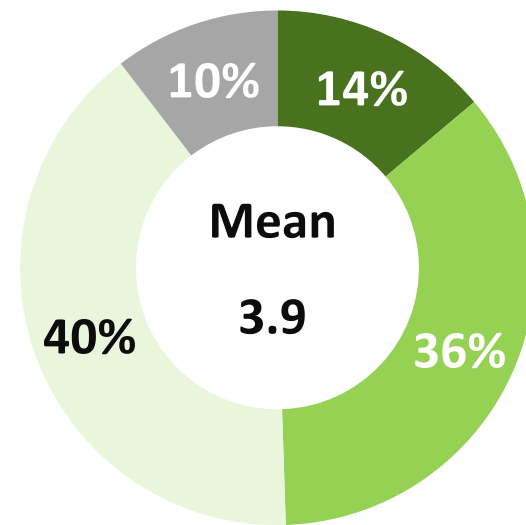
Similar to previous waves, a majority of Canadians agree or somewhat agree that Canada should expand oil and gas exports to help the world have more secure and reliable energy supplies (35% agree and 26% somewhat agree), and that these exports from Canada's oil and gas sector can contribute to combatting global climate change if our exports displace energy sources in other countries that are more damaging to the climate (33% agree and 30% somewhat agree).

An aerial photograph of a multi-lane highway. Two white tanker trucks are driving on the right side of the road. The highway is bordered by a dense forest of evergreen trees. In the background, a large body of water is visible, with a forested island in the middle. Distant mountains are visible under a hazy sky. The text is overlaid on the image.

Political influence and expert advice in energy
and environmental policy decisions

Preferred influence on energy and environmental policy decisions

Q – Thinking about how government decisions on energy and environmental policy are made, on a scale of 0 to 10, what should be the mix between the politics of a particular government and the advice a government receives from the non-partisan public service; where 0 is “decisions should be strongly influenced by the advice received from the non-partisan public service” and 10 is “decisions should be strongly influenced by the politics of the government.”



- Decisions should be strongly influenced by the politics of the government (7-10)
- Balanced approach (4-6)
- Decisions should be strongly influenced by the advice received from the non-partisan public service (0-3)
- Unsure

*Weighted to the true population proportion.

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

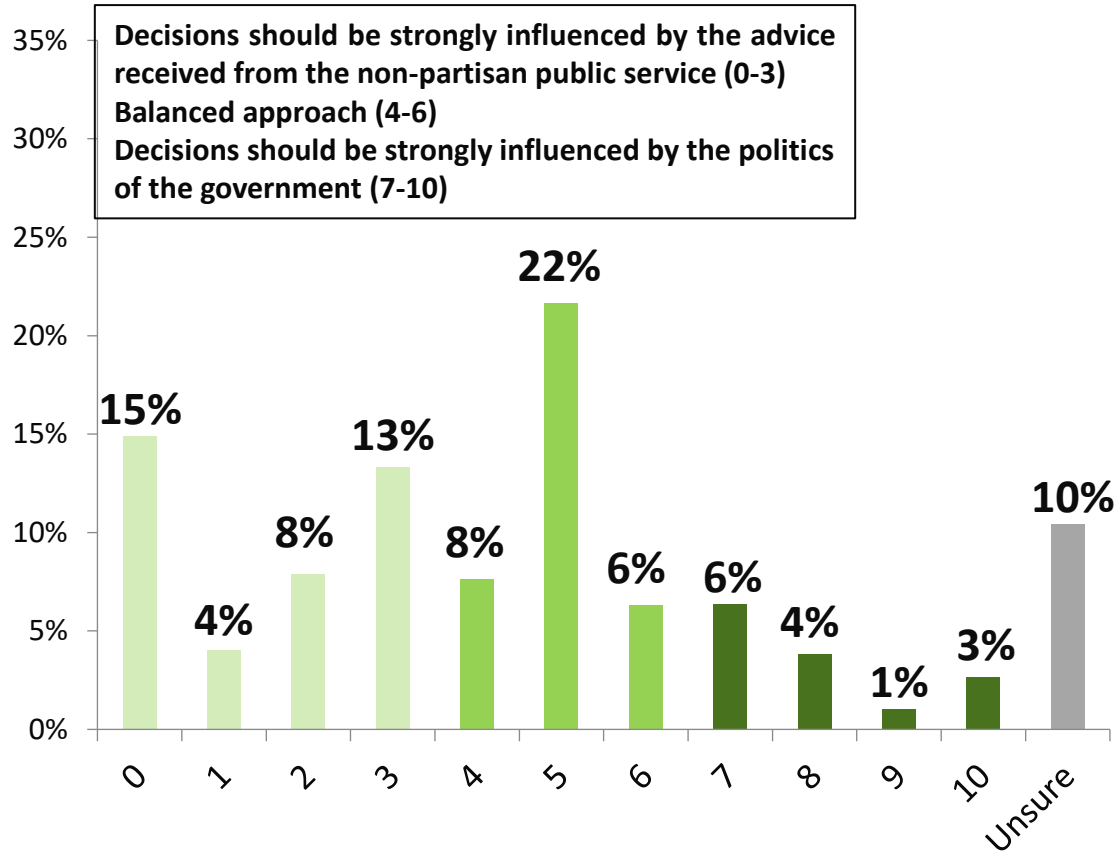
Canadians are almost three times more likely

to say decisions on energy and environmental policy should be influenced by the advice received from the non-partisan public service than by the politics of the government of the day, while over one in three say they should use a balanced approach.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Preferred influence on energy decisions – by demographics

Q – Thinking about how government decisions on energy and environmental policy are made, on a scale of 0 to 10, what should be the mix between the politics of a particular government and the advice a government receives from the non-partisan public service; where 0 is “decisions should be strongly influenced by the advice received from the non-partisan public service” and 10 is “decisions should be strongly influenced by the politics of the government”



Decisions should be strongly influenced by the advice received from the non-partisan public service (0-3)
Balanced approach (4-6)
Decisions should be strongly influenced by the politics of the government (7-10)

	Atlantic (n=84)	Quebec (n=231)	Ontario (n=352)	Prairies (n=216)	BC (n=152)
Mean	4.0	4.0	3.9	3.6	3.9
	Men (n=551)	Women (n=484)	18-34 (n=167)	35-54 (n=362)	55 plus (n=506)
Mean	4.0	3.8	4.0	3.6	4.0
	Usually votes LPC (n=323)	Usually votes CPC (n=299)	Usually votes NDP (n=105)	Left-leaning (n=211)	Right-leaning (n=239)
Mean	3.8	4.2	3.3	3.5	4.2

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

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Reasons for preferred influence on energy decisions and environmental policy

Q – Why do you have that opinion? [OPEN]

TOP RESPONSES	All	Decisions should be strongly influenced by the politics of the government (7-10)	Balanced approach (4-6)	Decisions should be strongly influenced by the advice received from the non-partisan public service (0-3)
	n=772	n=114	n=243	n=353
Government bias/Politics getting in the way/Politicians are not experts	27.3%	19.1%	16.9%	40.2%
Ask experts in the field/Science-based evidence and facts/Independent sources	13.4%	9.0%	8.5%	20.0%
Advice from both government and public service	13.0%	7.0%	32.5%	2.5%
Public service should make decisions	8.0%	9.1%	8.0%	9.0%
Public service do not have a good reputation/Can be biased	6.8%	15.1%	8.9%	1.2%
Decisions should be made by the government/who people voted for	4.3%	19.9%	3.5%	0.3%
Public service usually non-partisan and not money oriented	4.0%	6.3%	1.3%	5.9%
Government failing to make changes/Poor decisions	4.0%	3.8%	2.2%	6.0%
Get the public interested/Public opinion	3.6%	1.0%	4.8%	3.9%
Elected officials change/Public service remains the same	2.7%	2.1%	1.6%	4.2%
No one should be trusted	1.5%	0.6%	3.3%	0.2%
Personal opinion	1.5%	2.2%	0.7%	1.9%
Decisions should be made by those in the business	0.9%	-	-	1.6%
Public service does not always factor in the global picture/affairs of the country	0.4%	-	1.1%	-
Other	3.2%	3.7%	3.5%	2.4%
Unsure	5.6%	1.1%	3.1%	0.4%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Sources for the government to seek advice on energy policy – by demographics

Q – When governments seek advice on energy policy in Canada, which source(s) do you believe should play a role in informing their decisions? Please assign a percentage for each source based on the influence you believe each source should have: [RANDOMIZE]

	2024-08 (n=1000)	Atlantic (n=67)	Quebec (n=231)	Ontario (n=388)	Prairies (n=175)	BC (n=139)	Men (n=490)	Women (n=510)	18-34 (n=267)	35-54 (n=322)	55 plus (n=411)
Mean											
Academia (Universities, Peer-reviewed science, researchers)	17.8%	19.5%	22.5%	14.5%	15.5%	21.3%	18.3%	17.3%	20.7%	17.0%	16.5%
Industry experts/business	17.2%	18.2%	12.0%	17.1%	24.3%	16.7%	17.9%	16.6%	13.6%	20.0%	17.4%
Environmental organizations	11.4%	11.8%	13.1%	11.6%	9.4%	10.3%	10.1%	12.6%	11.4%	11.0%	11.6%
Civil servants/government agencies	9.7%	11.4%	10.7%	9.5%	7.8%	10.4%	10.5%	9.1%	8.7%	9.8%	10.4%
Citizens/community-driven initiatives	9.6%	12.1%	9.3%	8.8%	10.8%	9.7%	9.8%	9.4%	9.7%	9.9%	9.3%
Elected officials	8.5%	7.4%	8.8%	9.0%	7.8%	7.6%	9.4%	7.5%	7.0%	8.5%	9.3%
Indigenous communities/organizations	8.4%	7.1%	7.0%	9.5%	7.8%	8.9%	7.3%	9.4%	7.8%	8.4%	8.7%
Think-tanks	6.9%	6.1%	7.0%	6.5%	8.0%	6.8%	7.3%	6.5%	5.9%	7.0%	7.4%
Unsure	10.6%	6.5%	9.6%	13.6%	8.6%	8.3%	9.5%	11.6%	15.1%	8.4%	9.3%

*Weighted to the true population proportion.

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

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Sources for the government to seek advice on energy policy – by political leaning

Q – When governments seek advice on energy policy in Canada, which source(s) do you believe should play a role in informing their decisions? Please assign a percentage for each source based on the influence you believe each source should have: [RANDOMIZE]

	2024-08 (n=1000)	Liberal Party of Canada (n=307)	Conservative Party of Canada (n=284)	New Democratic Party of Canada (n=110)	Bloc Quebecois (n=71)	I don't have a party I regularly vote for (n=194)	Left (n=211)	Right (n=229)
Mean								
Academia (Universities, Peer-reviewed science, researchers)	17.8%	18.8%	12.7%	21.2%	25.7%	18.9%	22.3%	11.9%
Industry experts/business	17.2%	12.8%	27.1%	8.1%	9.3%	18.1%	8.7%	26.9%
Environmental organizations	11.4%	13.1%	7.2%	14.9%	13.7%	11.6%	15.9%	7.0%
Civil servants/government agencies	9.7%	11.2%	8.5%	10.3%	11.8%	8.1%	10.4%	8.2%
Citizens/community-driven initiatives	9.6%	8.0%	10.7%	9.9%	8.7%	10.3%	8.1%	10.0%
Elected officials	8.5%	8.9%	8.6%	7.8%	10.3%	7.4%	7.5%	9.1%
Indigenous communities/organizations	8.4%	9.3%	6.4%	12.9%	7.8%	7.0%	11.7%	6.2%
Think-tanks	6.9%	6.9%	7.7%	4.3%	7.3%	7.3%	4.3%	8.4%
Unsure	10.6%	11.0%	11.0%	10.8%	5.4%	11.3%	11.1%	12.3%

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Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Reasons for choice of sources for energy advice for the government– by demographics

Q – Why do you have that opinion? [OPEN]

	All (n=700)	Atlantic (n=57)	Quebec (n=153)	Ontario (n=239)	Prairies (n=140)	BC (n=111)	Men (n=380)	Women (n=320)	18-34 (n=96)	35-54 (n=229)	55 plus (n=375)
More broad input/all interested parties should all have a say/balance	26.6%	44.0%	21.0%	29.9%	14.0%	31.8%	27.9%	25.4%	26.2%	27.3%	26.3%
Decision should be based on science/research/university/academia	18.7%	19.9%	22.8%	12.6%	22.2%	23.7%	17.4%	20.0%	29.1%	18.0%	14.1%
Industry experts should make the decisions	11.3%	10.9%	14.4%	8.6%	15.7%	8.8%	9.8%	12.7%	12.5%	13.3%	9.3%
Community knows better/Indigenous communities	6.3%	5.1%	8.6%	5.3%	8.5%	3.4%	4.5%	8.0%	5.2%	7.3%	6.1%
Don't trust government/politicians/the government lacks knowledge on this topic	5.6%	4.7%	2.5%	7.1%	6.4%	5.9%	5.6%	5.5%	1.4%	6.6%	6.9%
Common sense/my personal opinion	3.9%	6.6%	6.0%	3.4%	4.0%	0.8%	5.2%	2.7%	3.2%	2.6%	5.1%
They have their own agenda/don't trust any of them	3.7%	1.9%	2.7%	6.1%	3.0%	0.7%	5.1%	2.4%	1.4%	5.2%	3.8%
The government/elected officials should make the decisions	3.0%	-	3.1%	2.4%	5.3%	3.0%	3.7%	2.2%	-	4.9%	3.1%
People who are not biased/not financially motivated	2.9%	-	4.4%	2.0%	2.9%	4.2%	2.4%	3.3%	3.2%	2.1%	3.3%
I trust the groups I chose/groups are pro-energy	2.6%	-	2.2%	3.0%	3.6%	2.2%	2.8%	2.3%	-	3.8%	3.0%
Other	6.7%	3.1%	6.7%	7.8%	4.4%	7.8%	6.9%	6.5%	7.1%	4.7%	7.8%
Unsure	2.5%	-	0.6%	3.3%	3.9%	2.8%	2.0%	2.9%	4.9%	1.1%	2.2%

TOP RESPONSES

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Reasons for choice of sources for energy advice for the government– by political leaning

Q – Why do you have that opinion? [OPEN]

	All (n=700)	Liberal Party of Canada (n=216)	Conservative Party of Canada (n=188)	New Democratic Party of Canada (n=67)	Bloc Quebecois (n=53)	I don't have a party I regularly vote for (n=154)	Left (n=136)	Right (n=152)
More broad input/all interested parties should all have a say/balance	26.6%	31.4%	27.3%	24.2%	26.2%	20.1%	22.8%	25.7%
Decision should be based on science/research/university/academia	18.7%	20.9%	7.2%	29.3%	21.3%	23.8%	22.0%	12.2%
Industry experts should make the decisions	11.3%	9.3%	14.9%	8.9%	21.4%	7.6%	11.3%	14.2%
Community knows better/Indigenous communities	6.3%	4.7%	6.8%	3.7%	4.3%	7.2%	8.0%	4.9%
Don't trust government/politicians/the government lacks knowledge on this topic	5.6%	3.7%	8.9%	3.8%	1.6%	6.1%	5.6%	7.2%
Common sense/my personal opinion	3.9%	4.6%	4.6%	2.6%	7.0%	2.2%	1.1%	6.5%
They have their own agenda/don't trust any of them	3.7%	3.1%	5.5%	5.1%	-	3.0%	2.6%	7.5%
The government/elected officials should make the decisions	3.0%	2.8%	5.2%	1.1%	1.6%	2.4%	2.6%	3.9%
People who are not biased/not financially motivated	2.9%	2.4%	1.4%	5.3%	1.6%	4.6%	6.5%	1.5%
I trust the groups I chose/groups are pro-energy	2.6%	2.9%	4.3%	1.1%	3.2%	0.9%	2.1%	2.2%
Other	6.7%	6.3%	5.4%	6.6%	4.3%	10.8%	6.9%	6.9%
Unsure	2.5%	1.5%	1.8%	2.1%	-	-	2.7%	0.3%

TOP RESPONSES

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

An aerial photograph of a long pipeline stretching across a vast, forested landscape. The pipeline is supported by wooden posts and runs parallel to a dirt road. The terrain is covered in dense, green trees, and the sky is overcast. The image is darkened, with a bright green triangle in the top right corner and a vertical green bar on the right side.

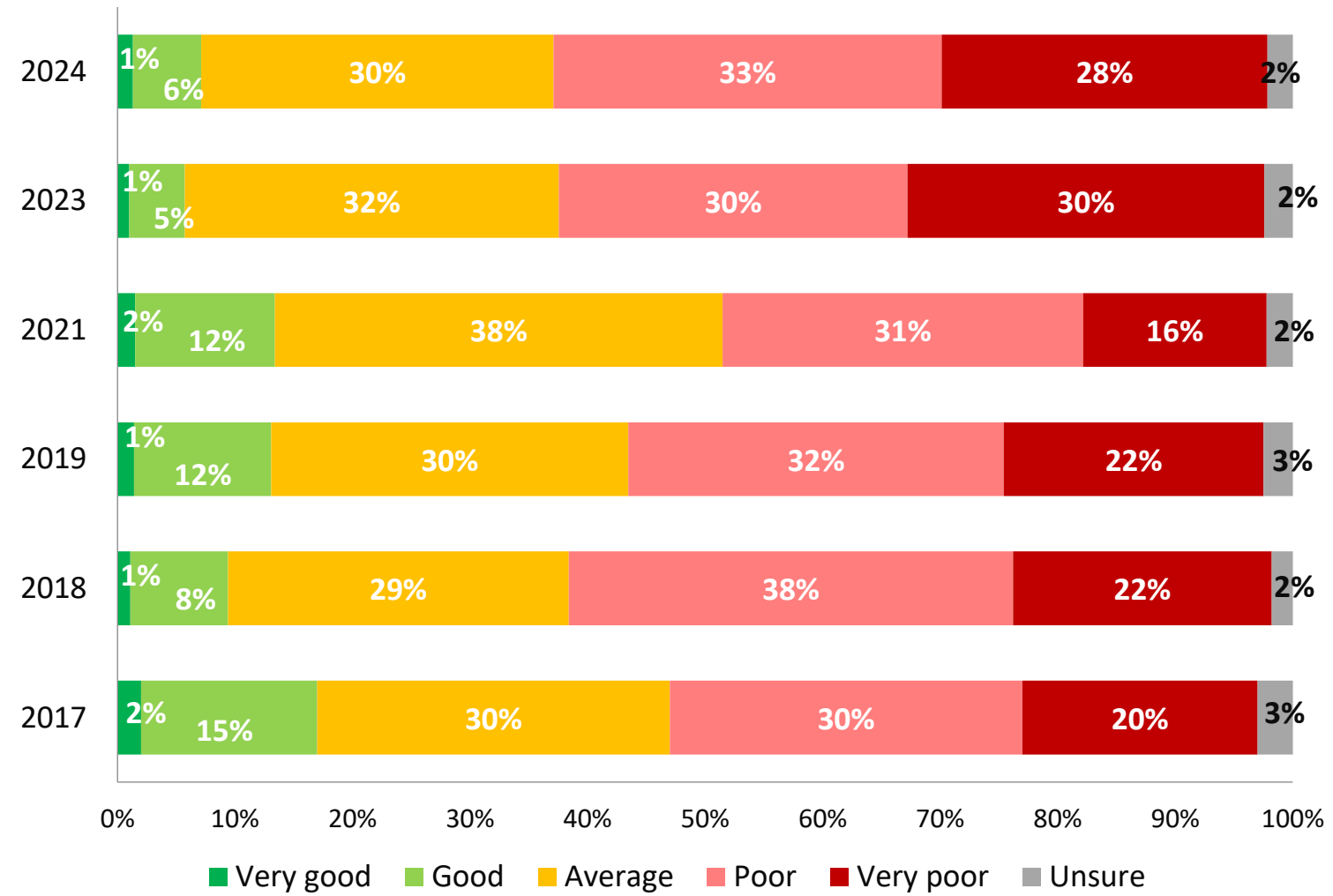
Government performance on building public confidence and shared vision

Job done by Canada at building public confidence in energy decision-making

A majority of Canadians say Canada is doing a poor or very poor job at building public confidence in energy decision-making. Three in ten say Canada is doing an average job, and under one in ten say it is doing a very good or good job.

Q - Does Canada do a very good, good, average, poor or very poor job at the following?

Building public confidence in energy decision-making



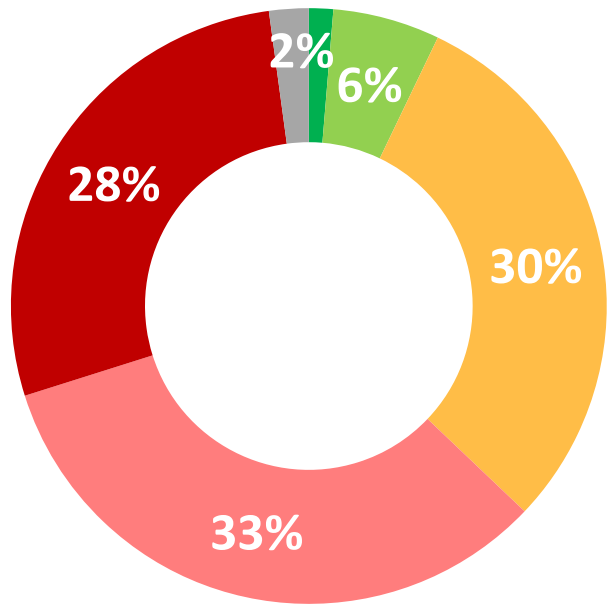
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Job done by Canada at building public confidence in energy decision-making

Q – Does Canada do a very good, good, average, poor or very poor job at the following? **Building public confidence in energy decision-making**



■ Very good ■ Good ■ Average
■ Poor ■ Very poor ■ Unsure

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

	Atlantic (n=84)	Quebec (n=231)	Ontario (n=352)	Prairies (n=216)	BC (n=152)
Very good/ good	8.6%	12.1%	4.9%	7.1%	4.6%
	Men (n=551)	Women (n=484)	18-34 (n=167)	35-54 (n=362)	55 plus (n=506)
	6.4%	7.8%	5.1%	7.3%	8.3%
	Usually votes LPC (n=323)	Usually votes CPC (n=299)	Usually votes NDP (n=105)	Left-leaning (n=211)	Right-leaning (n=239)
	14.3%	4.0%	3.6%	8.9%	6.0%
Very poor/ poor	Atlantic (n=84)	Quebec (n=231)	Ontario (n=352)	Prairies (n=216)	BC (n=152)
	51.9%	41.5%	63.7%	71.7%	75.0%
	Men (n=551)	Women (n=484)	18-34 (n=167)	35-54 (n=362)	55 plus (n=506)
	65.6%	56.1%	64.5%	59.7%	59.1%
	Usually votes LPC (n=323)	Usually votes CPC (n=299)	Usually votes NDP (n=105)	Left-leaning (n=211)	Right-leaning (n=239)
	39.3%	79.6%	65.8%	50.7%	76.1%

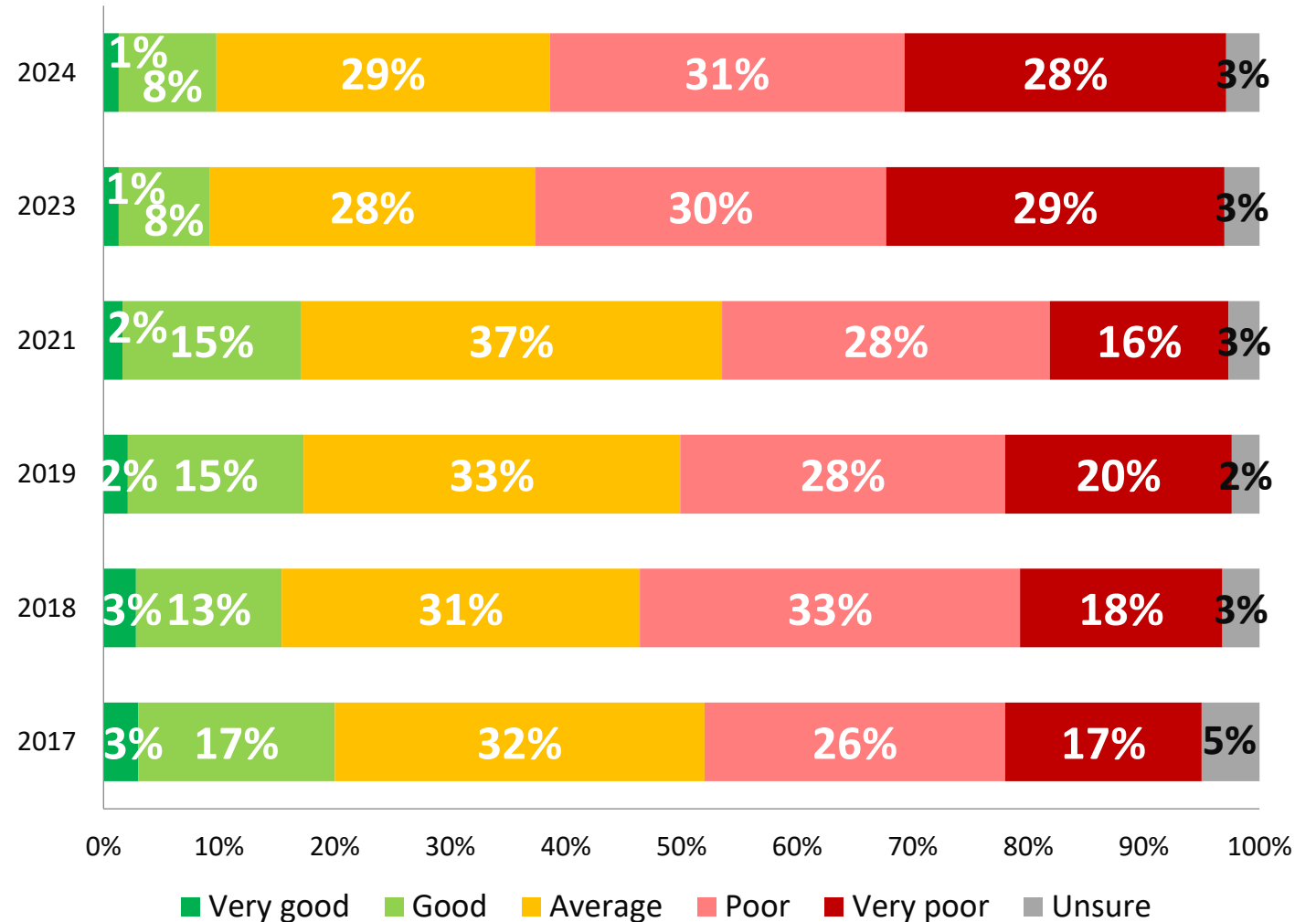
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Job done by Canada at developing a long-term vision for Canada's energy future

Canadians are over six times more likely to say that Canada is doing a poor or very poor job at developing a shared long-term vision for Canada's energy future than a good or very good job.

Q - Does Canada do a very good, good, average, poor or very poor job at the following?

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



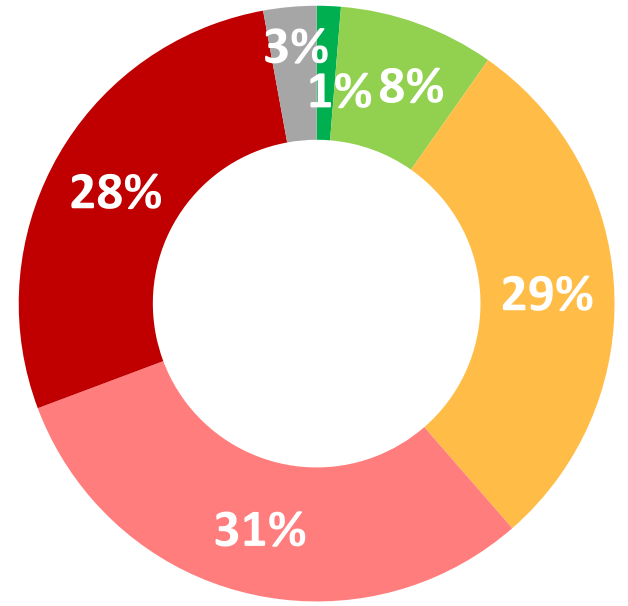
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Job done by Canada at developing a long-term vision for Canada's energy future

Q – Does Canada do a very good, good, average, poor or very poor job at the following? **Developing a shared long-term vision for Canada's energy future**



■ Very good ■ Good ■ Average
■ Poor ■ Very poor ■ Unsure

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

	Atlantic (n=84)	Quebec (n=231)	Ontario (n=352)	Prairies (n=216)	BC (n=152)
Very Good/ Good	13.9%	16.6%	7.4%	7.6%	5.7%
	Men (n=551)	Women (n=484)	18-34 (n=167)	35-54 (n=362)	55 plus (n=506)
	8.9%	10.6%	5.3%	10.9%	11.7%
	Usually votes LPC (n=323)	Usually votes CPC (n=299)	Usually votes NDP (n=105)	Left-leaning (n=211)	Right-leaning (n=239)
	20.2%	3.9%	5.1%	11.4%	7.4%
Very poor/ Poor	49.4%	39.8%	61.6%	68.3%	73.1%
	Men (n=551)	Women (n=484)	18-34 (n=167)	35-54 (n=362)	55 plus (n=506)
	64.1%	53.2%	59.7%	56.4%	59.4%
	Usually votes LPC (n=323)	Usually votes CPC (n=299)	Usually votes NDP (n=105)	Left-leaning (n=211)	Right-leaning (n=239)
	39.9%	81.9%	55.4%	49.1%	76.6%

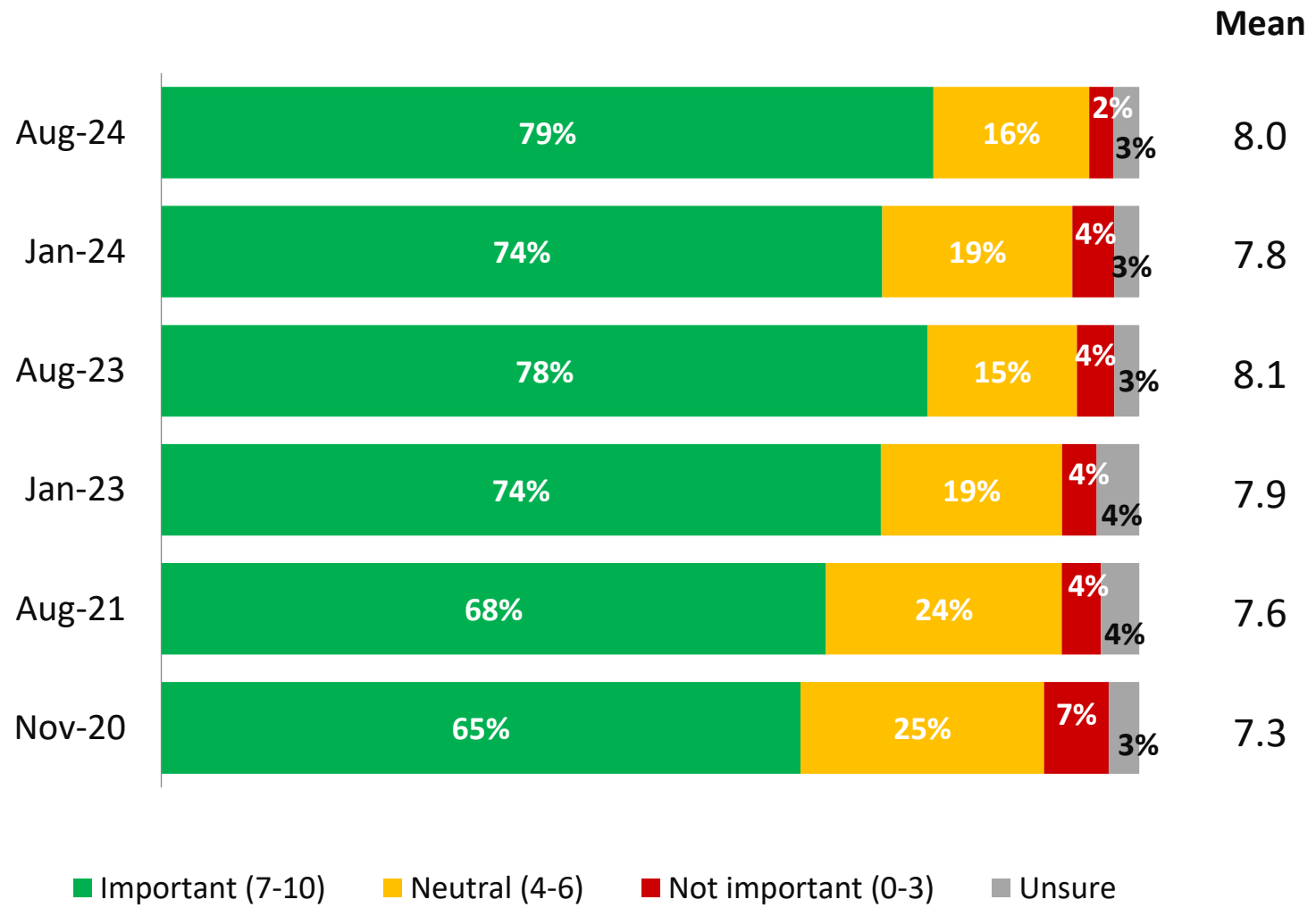
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Current and future of oil and gas

The image shows an oil field at sunset. Several pumpjacks are silhouetted against a bright orange and yellow sky. The ground is dark, and there are pools of water reflecting the sky and the structures. The overall mood is industrial and serene.

Importance of oil and gas to Canada's current economy

As observed in previous waves, most Canadians (79%) say oil and gas is important to Canada's current economy. This number has risen since 2020.



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

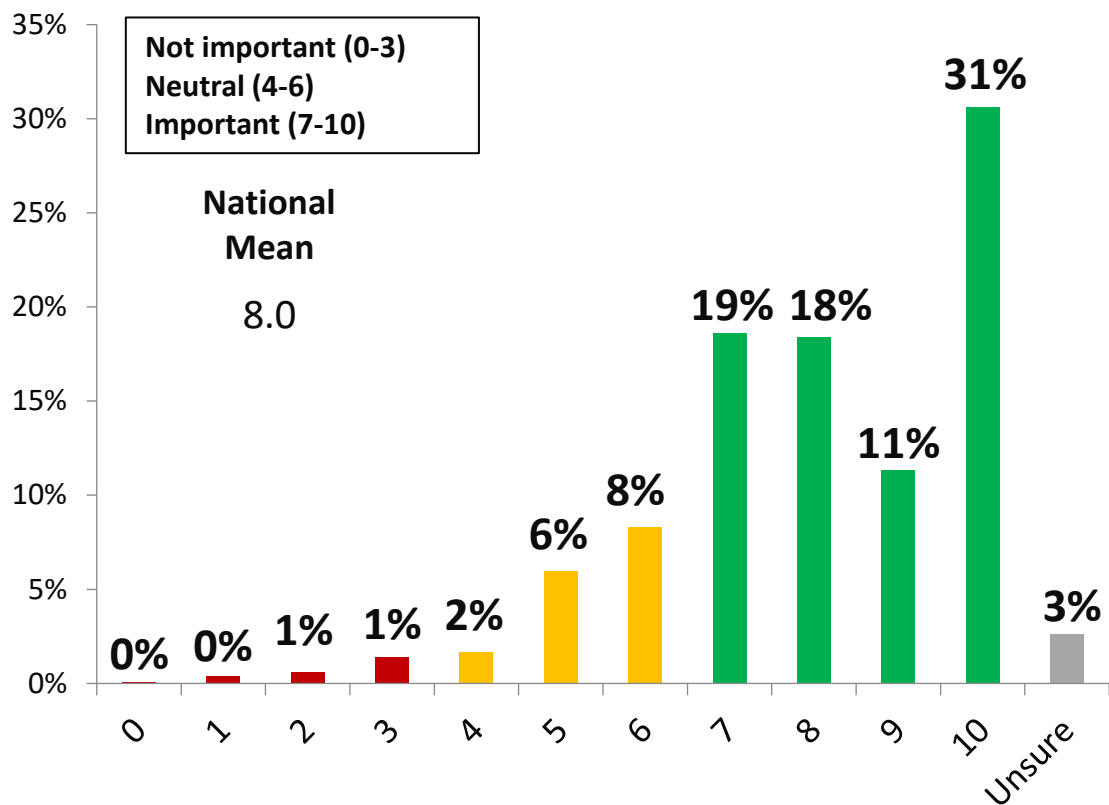
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Q – On a scale of 0 to 10, where 0 means not at all important and 10 is extremely important, how important is oil and gas to Canada's **current** economy?

Importance of oil and gas to Canada's current economy

Q – On a scale of 0 to 10, where 0 means not at all important and 10 is extremely important, how important is oil and gas to Canada's **current** economy?



	Atlantic (n=84)	Quebec (n=231)	Ontario (n=352)	Prairies (n=216)	BC (n=152)
Mean	7.9	7.6	8.1	8.4	7.9
	Men (n=551)	Women (n=484)	18-34 (n=167)	35-54 (n=362)	55 plus (n=506)
Mean	8.1	7.9	7.9	8.1	7.9
	Usually votes LPC (n=323)	Usually votes CPC (n=299)	Usually votes NDP (n=105)	Left-leaning (n=211)	Right-leaning (n=239)
Mean	7.5	9.2	6.7	6.7	9.1

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

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Reason for opinion on the importance of oil and gas to Canada's current economy

Q – Why do you have that opinion? [OPEN]

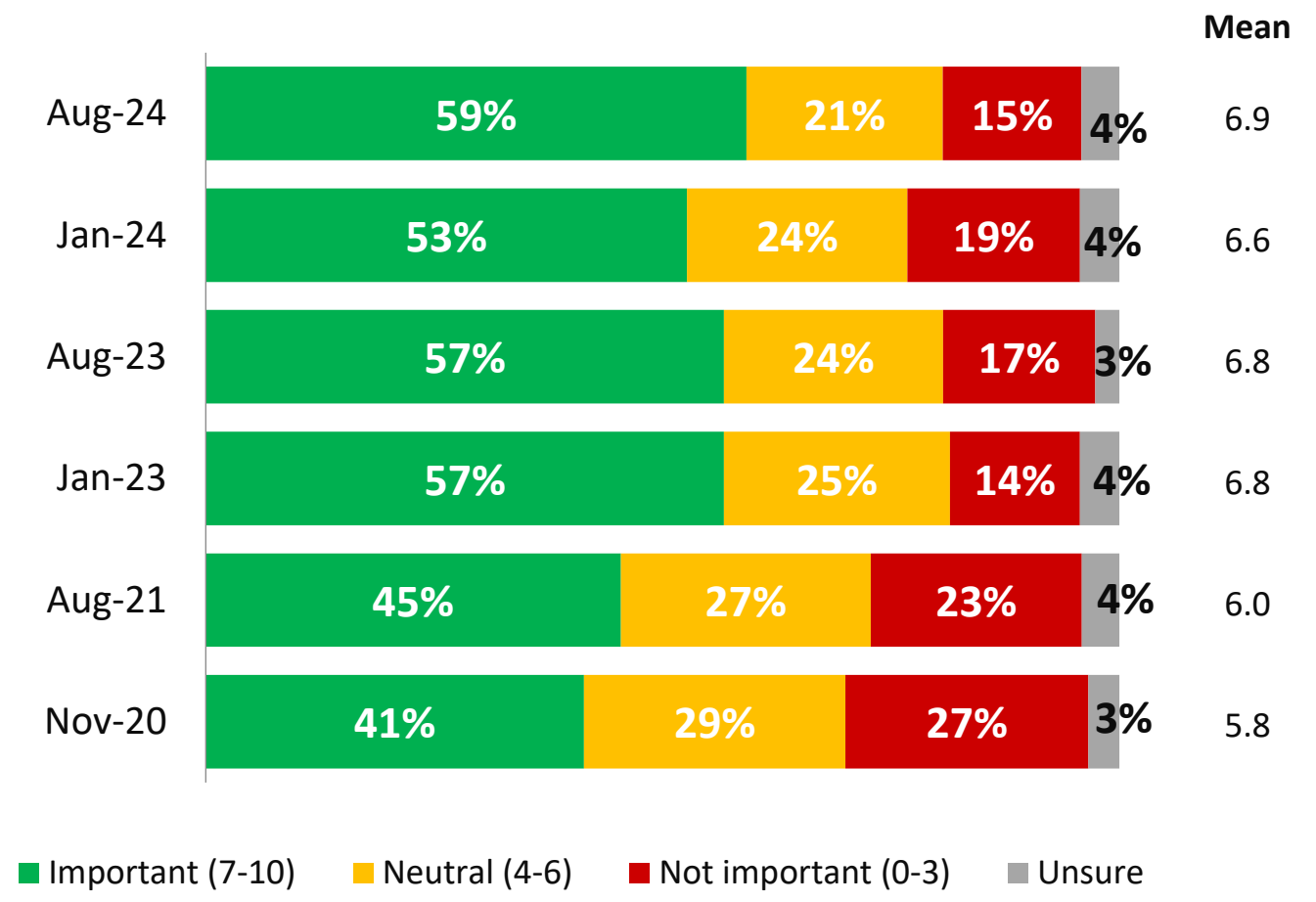
	Total		Important (7-10)		Neutral (4-6)		Not Important (0-3)	
	2024-08 (n=873)	2024-01 (n=941)	2024-08 (n=702)	2024-01 (n=721)	2024-08 (n=133)	2024-01 (n=170)	2024-08* (n=21)	2024-01 (n=37)
Contributes/tied to Canadian/provincial economy, exports, jobs	28.2%	25.0%	31.1%	29.9%	19.1%	12.8%		7.9%
Oil and gas are important Canadian natural resources/we have a lot of it/produce it	12.6%	4.0%	15.3%	4.6%	2.5%	3.1%		-
We are still reliant/dependent on it	8.7%	9.6%	10.0%	12.3%	3.8%	1.9%		-
Should be exploited more/exporting more and importing less/energy independence	7.5%	7.7%	9.2%	8.9%	0.6%	3.8%		6.1%
Need to look into more sustainable, renewable and greener options (solar, wind, tidal etc.)	7.5%	5.1%	3.5%	1.6%	24.5%	14.5%		25.1%
We do not have/have not yet developed a reliable alternative/the transition to renewables is too slow	6.6%	6.9%	8.2%	7.6%	0.6%	6.1%		2.2%
Needed for our lifestyle and the cold weather (vehicle and transportation, heating etc.)	6.1%	10.3%	7.4%	12.7%	1.5%	4.4%		-
Important for Alberta/west in particular	5.6%	7.1%	4.6%	7.0%	10.9%	7.0%		9.4%
From what I heard/experience/research	4.1%	4.0%	3.7%	4.0%	5.8%	4.4%		3.3%
It is bad for the environment	2.3%	1.0%	0.7%	0.3%	8.5%	2.7%		5.5%
Oil and gas is no longer/not as relevant to the country/our economy	2.2%	3.0%	0.3%	0.3%	10.0%	13.5%		4.2%
Importance of oil and gas will be reduced but the transition to other energy sources will not be in near future	1.8%	7.7%	1.5%	5.4%	2.4%	15.7%		13.8%
Because of government policies/subsidies	1.8%	1.5%	1.1%	0.9%	6.0%	2.1%		8.9%
Other	0.5%	1.7%	0.6%	1.1%	-	2.8%		4.7%
Unsure	0.9%	1.8%	0.3%	0.4%	-	3.4%		-

*Shaded due to small sample size

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Importance of oil and gas to Canada's future economy

A majority of Canadians continue to say oil and gas is important to Canada's future economy. This number has risen since 2020.



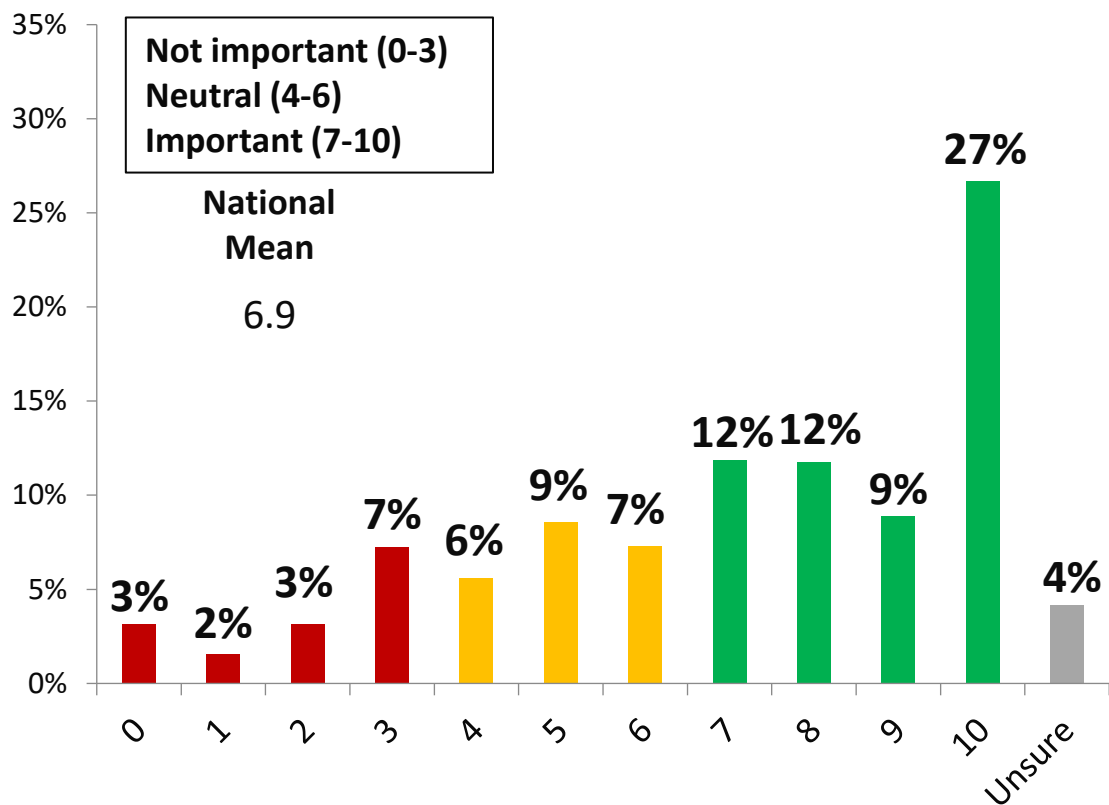
*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Q – On a scale of 0 to 10, where 0 means not at all important and 10 is extremely important, how important is oil and gas to Canada's **future** economy?

Importance of oil and gas to Canada's future economy

Q – On a scale of 0 to 10, where 0 means not at all important and 10 is extremely important, how important is oil and gas to Canada's **future** economy?



	Atlantic (n=84)	Quebec (n=231)	Ontario (n=352)	Prairies (n=216)	BC (n=152)
Mean	6.7	6.2	7.2	7.5	6.7
	Men (n=551)	Women (n=484)	18-34 (n=167)	35-54 (n=362)	55 plus (n=506)
Mean	7.1	6.7	6.8	7.1	6.9
	Usually votes LPC (n=323)	Usually votes CPC (n=299)	Usually votes NDP (n=105)	Left-leaning (n=211)	Right-leaning (n=239)
Mean	6.2	9.0	4.7	4.7	8.8

*Weighted to the true population proportion.

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

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Reason for opinion on the importance of oil and gas to Canada's future economy

Q – Why do you have that opinion? [OPEN]

TOP RESPONSES		Total		Important (7-10)		Neutral (4-6)		Not Important (0-3)	
		2024-08 (n=849)	2024-01 (n=922)	2024-08 (n=508)	2024-01 (n=495)	2024-08 (n=194)	2024-01 (n=216)	2024-08 (n=123)	2024-01 (n=182)
		Moving towards clean energy/reducing reliance on fossil fuels	31.0%	25.1%	9.7%	6.2%	64.5%	47.8%	65.8%
Remains a large part of Canada's economy/still contributing to Canada's economy	20.2%	13.3%	33.1%	23.2%	2.9%	3.9%	0.5%	1.9%	
Oil and gas remains the main energy source/key resource in Canada/nothing can/will replace oil and gas	16.9%	18.2%	24.5%	31.5%	8.3%	5.1%	4.1%	1.8%	
Switching to clean energy is far from ready to replace fossil fuels/there will be a demand for oil and gas for years to come	10.6%	13.3%	14.9%	17.4%	6.6%	12.6%	0.6%	6.1%	
Need to shift energy sources to control climate change	5.5%	7.8%	1.3%	1.1%	8.3%	9.5%	17.4%	23.9%	
Renewables will not work/Government scam	2.7%	2.0%	3.9%	3.4%	1.4%	0.4%	-	-	
Products (plastics, petroleum products, manufacturing) will still be needed	2.2%	4.6%	2.8%	6.1%	2.5%	4.5%	-	1.1%	
This is just what I hope/common sense	1.8%	1.0%	0.8%	0.9%	1.2%	0.6%	6.1%	1.6%	
Oil and gas still needed for transportation	1.0%	2.0%	1.4%	2.7%	0.7%	0.7%	-	1.0%	
Our reserves will eventually be depleted	1.0%	1.9%	0.7%	0.3%	-	0.8%	3.7%	7.7%	
Renewable energy sources can help diversify the economy and energy supply	0.9%	5.0%	1.2%	2.5%	-	8.6%	1.1%	7.8%	
Canada produces cleaner fossil fuels than other countries, so we should continue to produce	0.9%	1.3%	1.5%	2.4%	-	-	-	-	
I do not know enough to answer	0.8%	1.1%	-	-	-	0.6%	-	-	
Other	2.1%	2.4%	3.1%	2.0%	1.0%	3.8%	0.6%	1.9%	
Unsure	2.4%	1.2%	1.1%	0.3%	2.8%	1.1%	-	-	

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

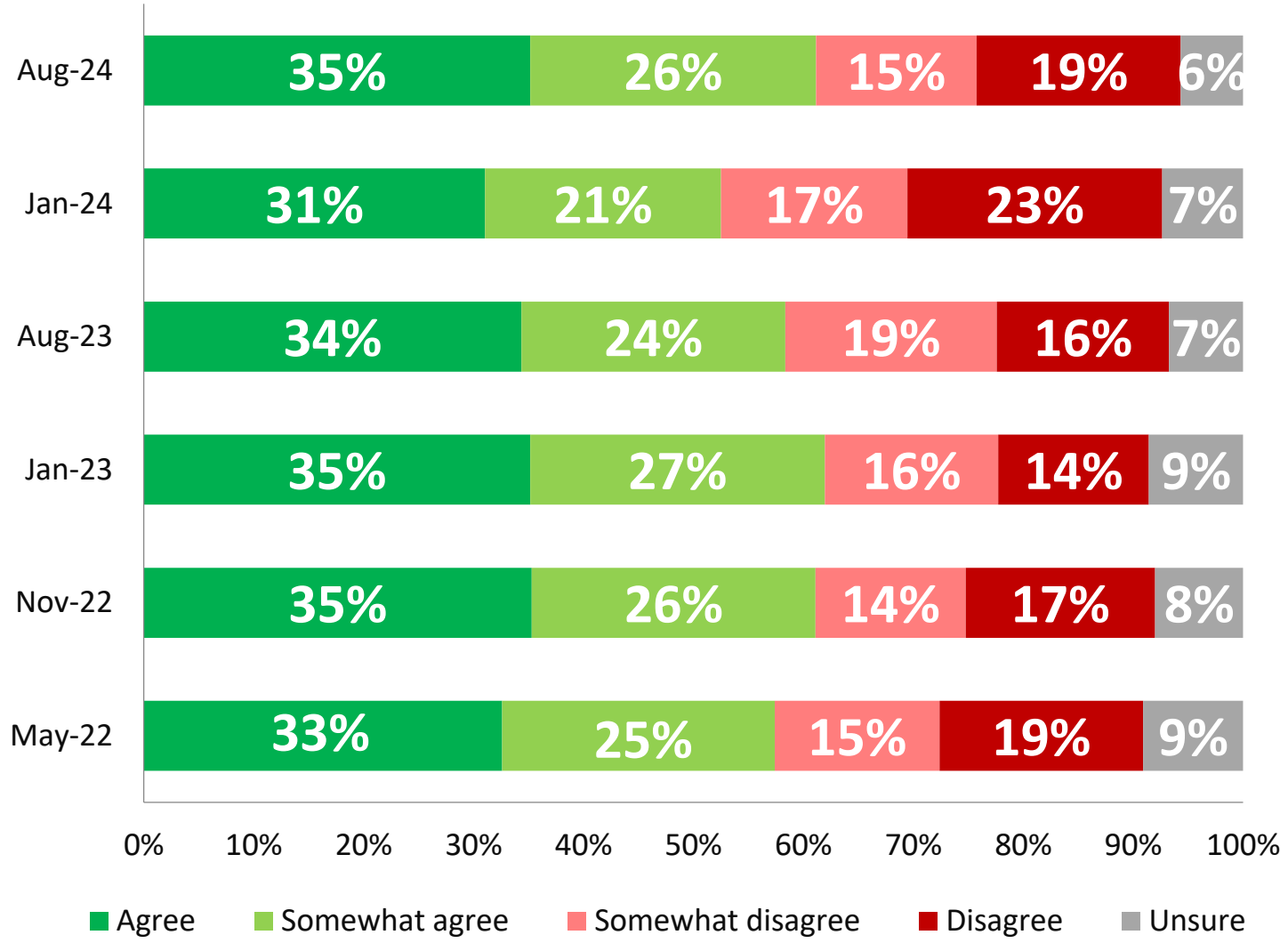


Oil and gas exports for security, for climate

Level of agreement that Canada should expand oil and gas exports to help the world have more secure energy supplies

Three in five Canadians agree or somewhat agree that Canada should expand oil and gas exports to help the world have more secure and reliable energy supplies.

Q – Do you agree, somewhat agree, somewhat disagree or disagree with the following statement: **Canada should expand oil and gas exports to help the world have more secure and reliable energy supplies?**

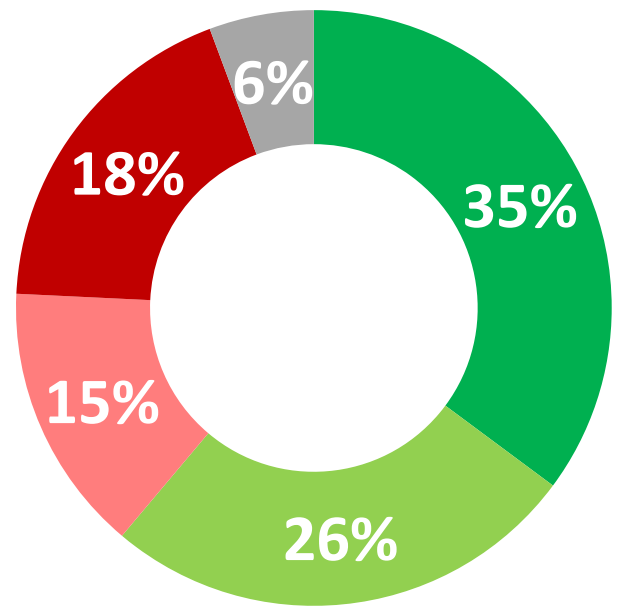


*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Level of agreement that Canada should expand oil and gas exports to help the world have more secure energy supplies

Q – Do you agree, somewhat agree, somewhat disagree or disagree that **Canada should expand oil and gas exports to help the world have more secure and reliable energy supplies?**

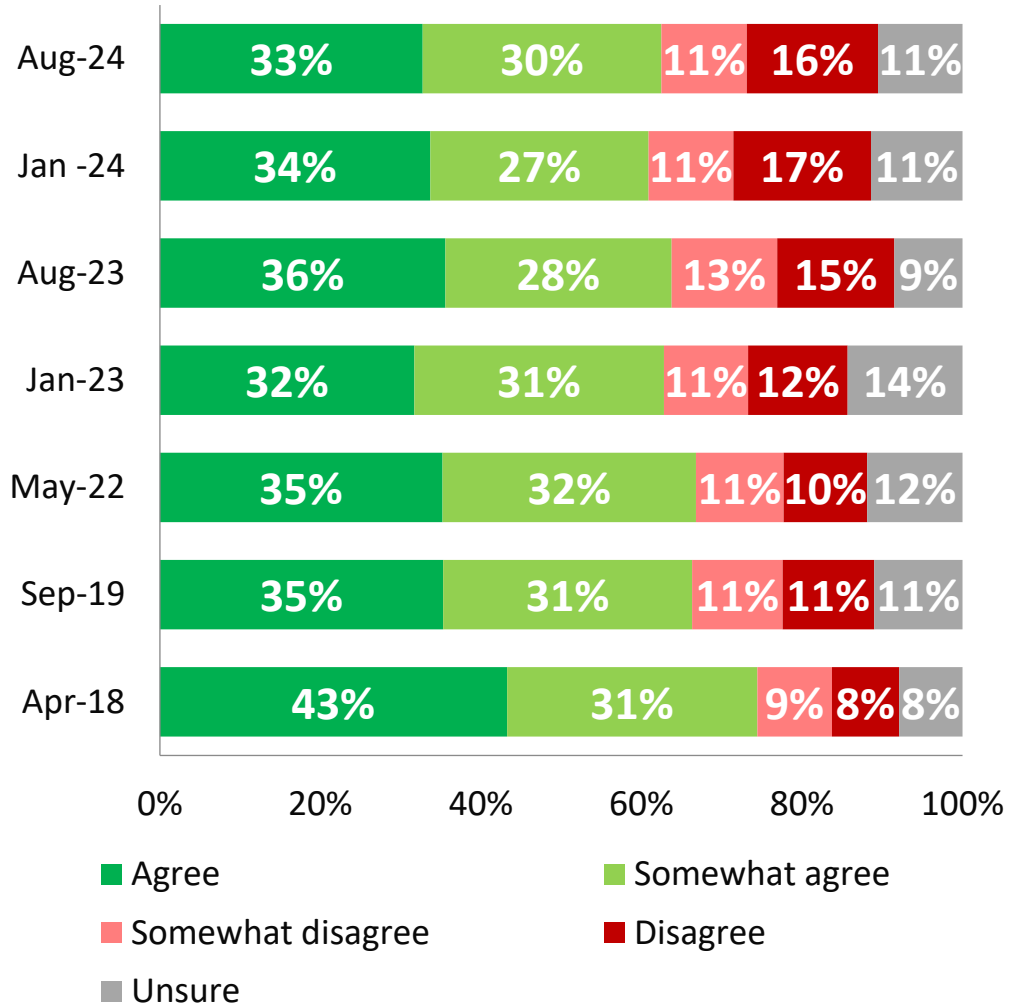


■ Agree
■ Somewhat agree
■ Somewhat disagree
■ Disagree
■ Unsure

Agree/ Somewhat agree	Atlantic (n=84)	Quebec (n=231)	Ontario (n=352)	Prairies (n=216)	BC (n=152)
	59.2%	47.2%	64.5%	72.9%	61.2%
	Men (n=551)	Women (n=484)	18-34 (n=167)	35-54 (n=362)	55 plus (n=506)
	71.1%	51.6%	61.5%	64.1%	58.5%
	Usually votes LPC (n=323)	Usually votes CPC (n=299)	Usually votes NDP (n=105)	Left-leaning (n=211)	Right-leaning (n=239)
	51.0%	89.5%	31.7%	27.2%	88.2%

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

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

Level of agreement that Canada's oil and gas sector can contribute to combatting global climate change by displacing other energy sources that are more damaging to the climate

Close to two in three Canadians agree or

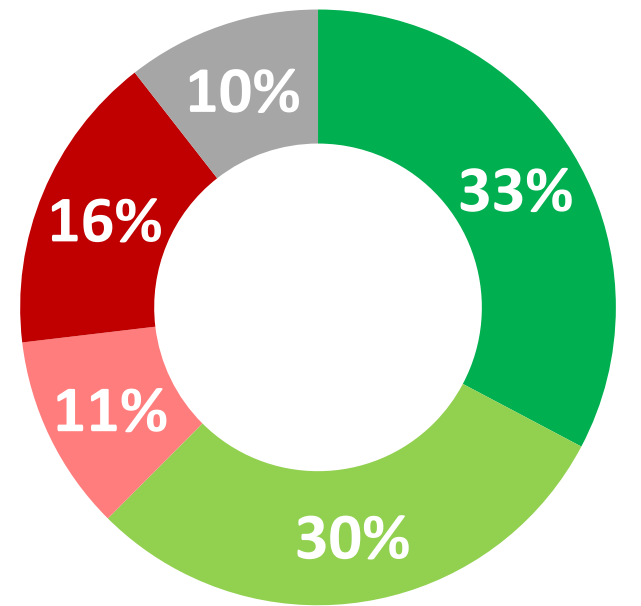
somewhat agree that exports from Canada's oil and gas sector can contribute to combatting global climate change if our exports displace energy sources in other countries that are more damaging to the climate.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Q – Do you agree, somewhat agree, somewhat disagree or disagree that **exports from Canada's oil and gas sector can contribute to combatting global climate change if our exports displace energy sources in other countries that are more damaging to the climate.**

Level of agreement that Canada's oil and gas sector can contribute to combatting global climate change by displacing other energy sources that are more damaging to the climate

Q – Do you agree, somewhat agree, somewhat disagree or disagree that exports from Canada's oil and gas sector can contribute to combatting global climate change if our exports displace energy sources in other countries that are more damaging to the climate.



■ Agree
■ Somewhat agree
■ Somewhat disagree
■ Disagree
■ Unsure

Agree/ Somewhat agree	Atlantic (n=84)	Quebec (n=231)	Ontario (n=352)	Prairies (n=216)	BC (n=152)
	57.2%	55.4%	61.9%	74.8%	62.8%
	Men (n=551)	Women (n=484)	18-34 (n=167)	35-54 (n=362)	55 plus (n=506)
	65.3%	59.7%	57.8%	63.5%	64.6%
Usually votes LPC (n=323)	Usually votes CPC (n=299)	Usually votes NDP (n=105)	Left-leaning (n=211)	Right-leaning (n=239)	
57.4%	83.0%	39.7%	42.0%	79.3%	

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

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

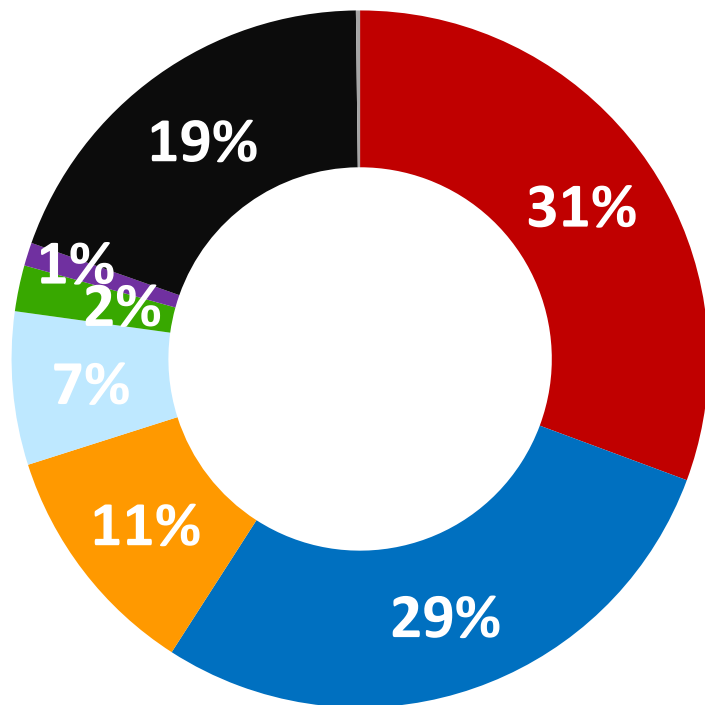
Political questions



Federal party usually supported

Q – Thinking of federal elections, **which federal party do you usually vote for?** [RANDOMIZE]

- Liberal Party of Canada
- Conservative Party of Canada
- New Democratic Party of Canada
- Bloc Quebecois
- Green Party of Canada
- People’s Party of Canada
- I don’t have a party I regularly vote for
- Other party

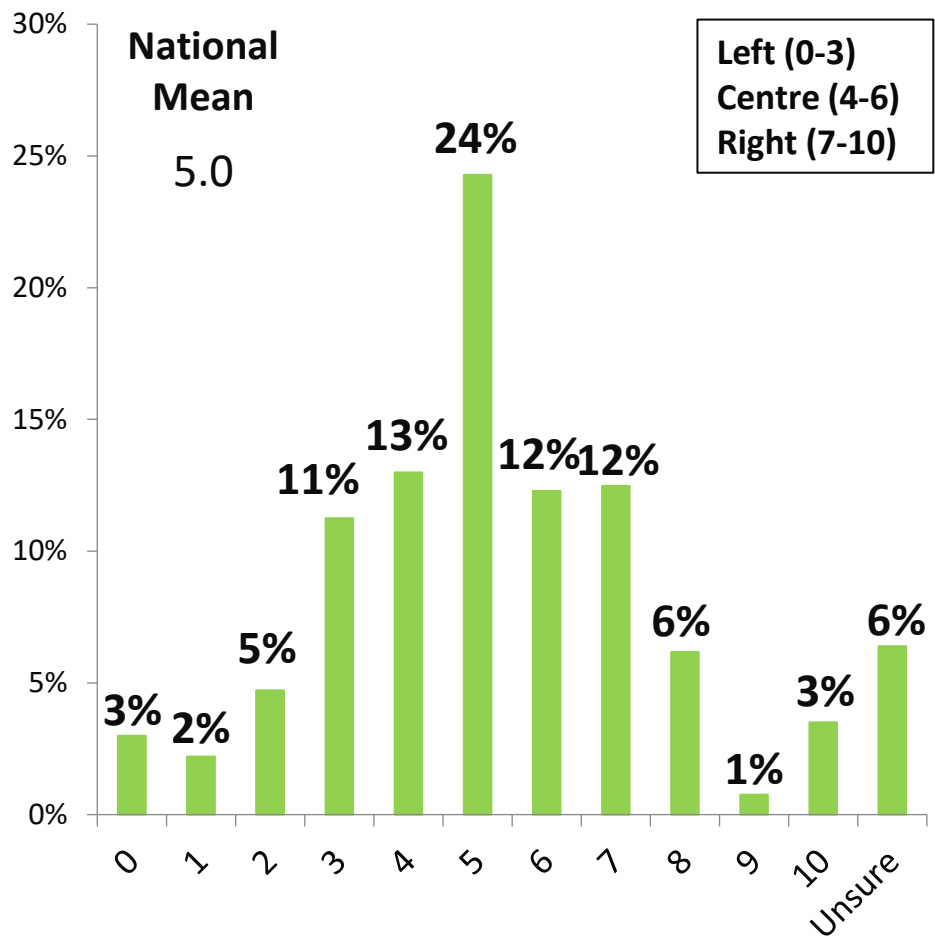


*Chart based on mean proportions
 **Weighted to the true population proportion.
 **Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Political views scale



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

	Atlantic (n=84)	Quebec (n=231)	Ontario (n=352)	Prairies (n=216)	BC (n=152)
Mean	4.6	4.8	5.1	5.5	4.7
	Men (n=551)	Women (n=484)	18 to 34 (n=167)	35 to 54 (n=362)	55 plus (n=506)
	5.3	4.8	4.8	5.2	5.0

Q –In politics people sometimes talk of left and right. In terms of your political views, where would you place yourself on a scale where 0 means left and 10 means right?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 29th to August 1st, 2024, n=1035, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,035 Canadians, 18 years of age or older, between July 29th and August 1st, 2024 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals were randomly called using random digit dialing with a maximum of five call backs.

The margin of error for a random survey of 1,035 Canadians is ± 3.1 percentage points, 19 times out of 20.

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

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



Element	Description	Element	Description
Research sponsor	Positive Energy at the University of Ottawa	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.
Population and Final Sample Size	1,035 Randomly selected individuals.	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.
Source of Sample	Nanos Probability Panel	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines, and individuals without internet access could not participate.
Type of Sample	Probability	Stratification	By age and gender using the latest Census information (2021) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Margin of Error	±3.1 percentage points, 19 times out of 20.	Estimated Response Rate	Nine percent, consistent with industry norms.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Question Order	Question order in the preceding report is organized by theme. Refer to the tabulations for the order in which they appear in the original questionnaire.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Question Content	Topics on the omnibus ahead of the survey content included: views on political issues, views on economic issues, views on federal party leaders and politics, extreme weather events, views on Liberal political party figures and the Liberal Party of Canada, views on the US election and the impact of business tax rates in Canada compared to those in the United States
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six-digit postal code was used to validate geography.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Fieldwork/Validation	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online	Research/Data Collection Supplier	Nanos Research
Number of Calls	Maximum of five call backs to those recruited.	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 .
Time of Calls	Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Data Tables	By region, age and gender By Political leaning
Field Dates	July 29 th to August 1 st , 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/		



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Any questions?



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TABULATIONS

