Importance of oil and gas to Canada's current and future economy hits new high; majority of Canadians don't want to align with the US on energy or climate policies.

POSITIVE **ENERGY** (n) NANOS

The research gauged the opinions among Canadians on oil and gas, more particularly how important they are to Canada's current and future economy as well as expanding oil and gas exports for a more secure global energy supply and to help combat climate change worldwide. Questions were also asked on the level of government respondents trust most for creating a positive environment for investors building energy infrastructure, government performance in decision-making on energy and climate change and whether Canada should align its energy or climate policies with those of the United States.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1077 Canadians, 18 years of age or older, between January 31st to February 3rd, 2025 as part of an omnibus survey.

The margin of error for a random survey of 1077 Canadians is ±3.0 percentage points, 19 times out of 20.

The statistical tabulations including the unweighted and weighted number of interviews can be accessed here.

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

Summary

KEY FINDINGS

1

OIL AND GAS INCREASINGLY SEEN AS HIGHLY IMPORTANT TO CANADA'S CURRENT AND FUTURE ECONOMY
Close to nine in ten Canadians rate oil and gas as important to Canada's current economy (score of 7-10 out of 10) (88%) which is a significant increase from the previous wave in August 2024 (79%), and an all-time high since tracking began in 2020. Additionally, an increasing proportion see oil and gas as important to the future economy, with seven in ten (70%) giving this a score of 7-10, up 11 percentage points since August 2024 and a 29-point increase from the benchmark wave in 2020.

2

CANADIANS SAY OIL AND GAS CONTINUE TO CONTRIBUTE TO ECONOMY
In terms of why they feel oil and gas are important to Canada's current economy, Canadians most often mention they contribute to and are tied to the Canadian and provincial economies (42%). The most cited reason for viewing oil and gas as important to Canada's future economy is that they remain a large part and contributor to Canada's economy (30%) and that switching to clean energy is far from ready to replace fossil fuels and there is still a demand (22%).

3

CANADIANS AGREE CANADA SHOULD EXPAND OIL AND GAS EXPORTS TO INCREASE GLOBAL ENERGY SECURITY
More than six in ten Canadians agree (36%) or somewhat agree (26%) that Canada should expand oil and gas exports to help the world have more secure energy supplies (a 10-percentage point increase from January 2024 – 31% agree; 21% somewhat agree). Of note, men are more likely than women to agree/somewhat agree (70% of men; 56% of women) that Canada should expand oil and gas exports to help the world have more secure energy supplies.

4

CANADA'S OIL & GAS EXPORTS SEEN AS A POSSIBLE CONTRIBUTOR TO COMBATTING CLIMATE CHANGE BY MAJORITY OF CANADIANS
A majority of Canadians agree (35%) or somewhat agree (31%) that exports from Canada's oil and gas sector can contribute to combatting global climate change by displacing energy sources that are more damaging to the climate. This is consistent with previous waves of research. Of note, residents of the Prairies are more likely (79%) than those from Quebec (51%) to agree or somewhat agree with this, while men are more likely to agree or somewhat agree (72%) than women (60%).

5

CANADIANS MORE LIKELY TO THINK THE GOVERNMENT DOES A POOR JOB AT PROVIDING POLICY/REGULATORY ENVIRONMENT FOR ENERGY INVESTMENTS RATHER THAN A GOOD JOB
Consistent with the previous waves, Canadians are three times more likely to rate the job done by governments at providing a clear, predictable and competitive policy and regulatory environment for investors building energy infrastructure to help Canada meet its climate change targets as very poor (23%) or poor (20%) rather than very good (3%) or good (10%).

6

REASON FOR POOR OR VERY POOR JOB CITED AS GOVERNMENT MOVING SLOWLY AND CREATING RED TAPE
Those who say governments do a poor or very poor job most often mention that governments in Canada are slow and create red tape (22%), while those who believe they are doing a good or very good job most often say they are taking actions and moving in the right direction (24%).

POSITIVE **ENERGY**   NANOS

KEY FINDINGS, CONT'D

7

CANADIANS DIVIDED OVER WHETHER THEY TRUST THE FEDERAL OR THEIR PROVINCIAL GOVERNMENT MORE TO CREATE A POSITIVE ENVIRONMENT FOR ENERGY INVESTMENTS IN INFRASTRUCTURE
About four in ten Canadians each say they trust the federal government (41%) or their provincial government (38%) more in terms of creating a positive environment for investors building energy infrastructure to help Canada meet its climate change targets, while one in five are unsure (21%).

8

CANADIANS MORE LIKELY TO SAY FEDERAL AND PROVINCIAL GOVERNMENTS DO A POOR JOB RATHER THAN A GOOD JOB AT COOPERATING
Consistent with previous waves, Canadians are six times more likely to say that federal and provincial governments do a very poor/poor job of cooperating on decision-making on energy (21% very poor; 32% poor) rather than a very good/good job (1% very good; 8% good). Findings are similar regarding cooperating on decision-making on climate change with just over half who say governments do a very poor (24%) or poor job (29%), compared to very good (1%) or good (8%).

9

THREE IN FIVE CANADIANS BELIEVE CANADA SHOULD NOT ALIGN ITS CLIMATE OR ENERGY POLICIES WITH THOSE OF THE UNITED STATES
Close to two thirds of Canadians say Canada should somewhat not (11%) or not align (53%) its climate policies with those of the United States, while just over six in ten say the same about its energy policies (14% not align; 47% somewhat not align). Residents of the Prairies (36%) and Ontario (30%) are more likely to want Canada to align or somewhat align with the United States on climate policies than residents of Quebec (15%); the results are similar for energy policies (Prairies: 38%; Ontario: 32%; Quebec: 17%). Politically right-leaning Canadians are more likely to favour alignment on energy (60%) or climate policies (59%) than left-leaning Canadians (9% energy; 9% climate).

10

CANADIANS WHO WANT ALIGNMENT CITE NEED TO BE ALLIES; THOSE WHO DO NOT MENTION CURRENT ADMINISTRATION AND LACK OF TRUST
Canadians who want Canada's energy policies to have at least some alignment with the US most often say this is because it is easier to partner with the US and we need help (22%), as well as being helpful to improve the economy (17%). Those who don't want alignment mention that the current US administration's only focus is drilling and profit and they disregard climate change (29%), that Trump and the US cannot be trusted (18%) and that Canada needs to remain independent (17%). Similarly, when asked why Canada should align on climate policies, the most frequently mentioned reason was that we should be allies and are partners in other things (21%) and that we should have a 'North America' approach and are the same continent (16%). Canadians who want little to no alignment say it's because of Trump and the new administration (36%) and that the US doesn't believe in climate change and don't have climate change policies (28%).

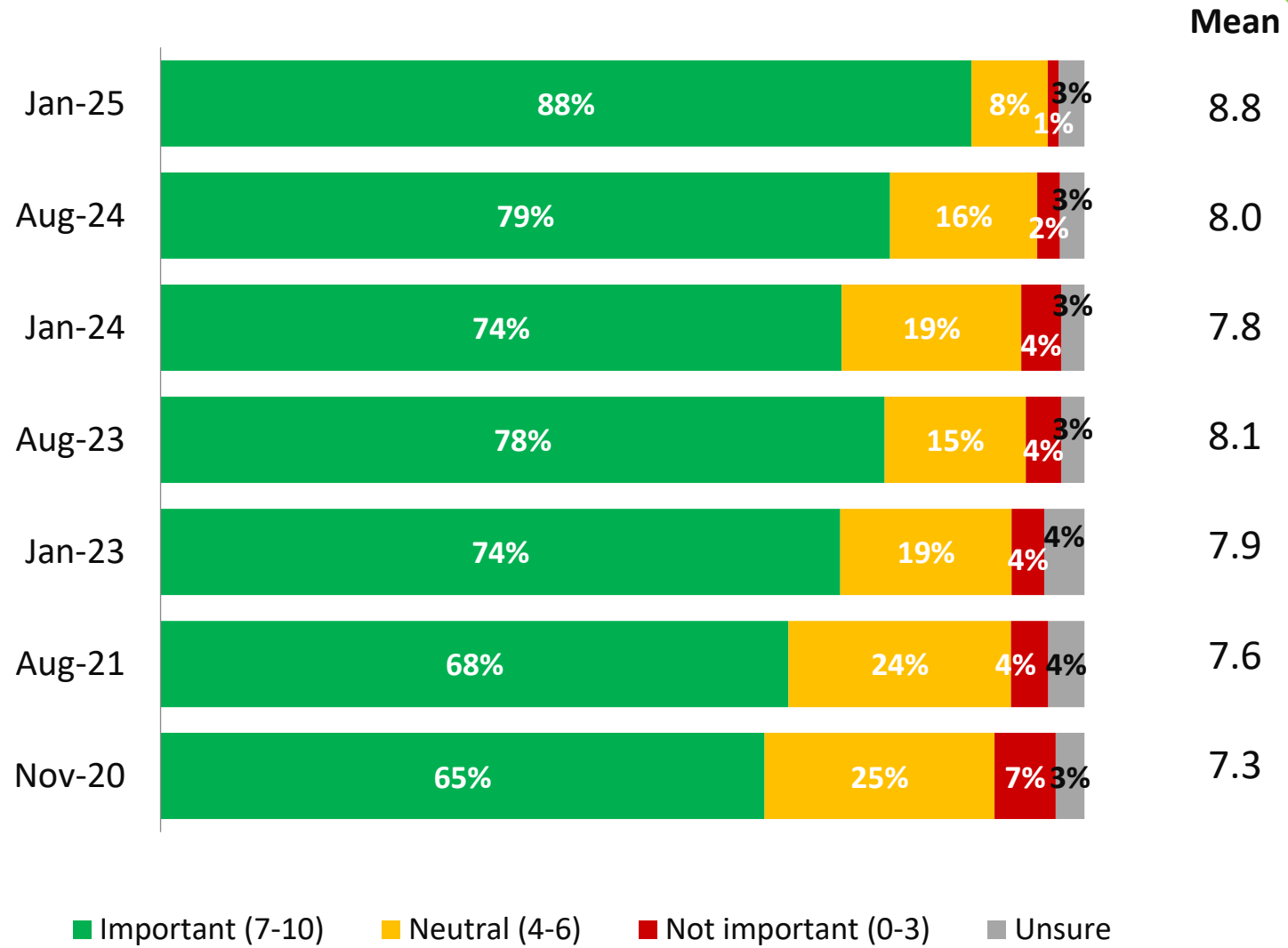POSITIVE **ENERGY**   **n** NANOS

Current and future of oil and gas

Importance of oil and gas to Canada's <u>current</u> economy

Canadians increasingly (88%) say oil and gas are important to Canada's current economy, a nine-percentage point increase from August 2024 and an all-time high in importance since tracking began in 2020.

Politically right-leaning Canadians are more likely to say they are important (mean of 9.6) to Canada's current economy than left-leaning Canadians (mean of 7.8).

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?

Mean

Date	Important (7-10)	Neutral (4-6)	Not important (0-3)	Unsure	Mean
Jan-25	88%	8%	1%	3%	8.8
Aug-24	79%	16%	2%	3%	8.0
Jan-24	74%	19%	4%	3%	7.8
Aug-23	78%	15%	4%	3%	8.1
Jan-23	74%	19%	4%	4%	7.9
Aug-21	68%	24%	4%	4%	7.6
Nov-20	65%	25%	7%	3%	7.3

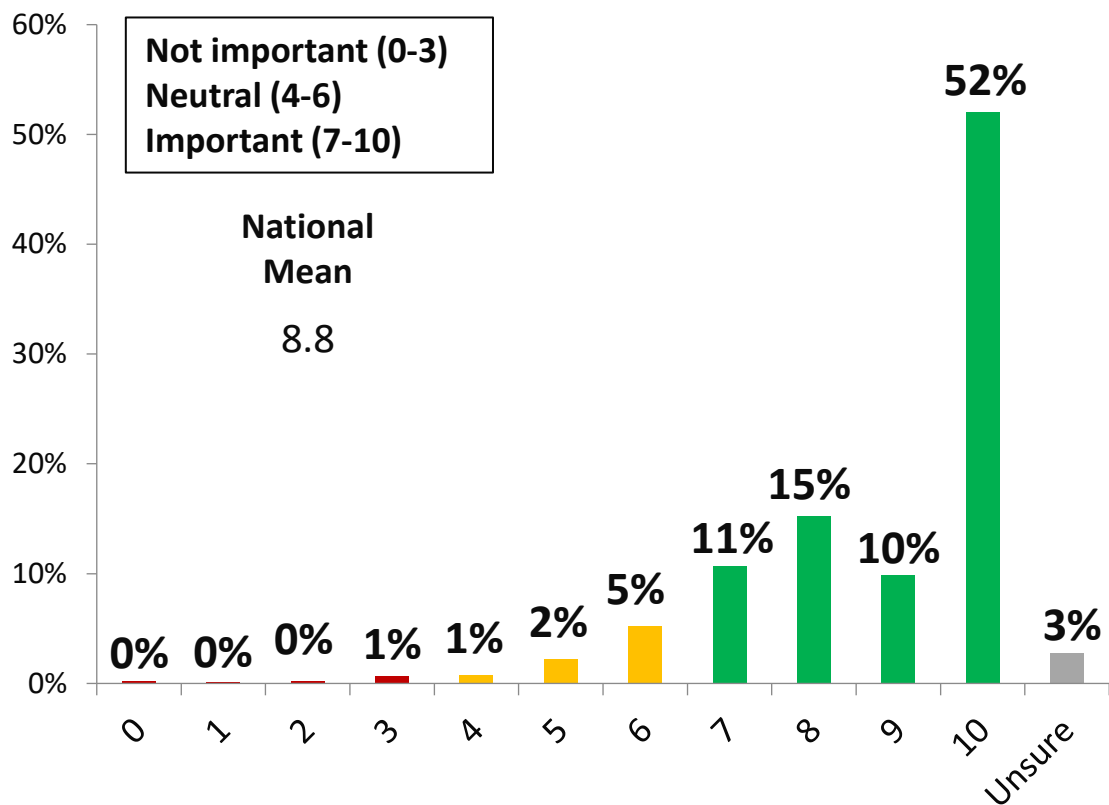■ Important (7-10)　■ Neutral (4-6)　■ Not important (0-3)　■ Unsure

*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, January 31st to February 3rd, 2025, n=1077, accurate 3.0 percentage points plus or minus, 19 times out of 20.

POSITIVE **ENERGY**　(n) NANOS

Importance of oil and gas to Canada's <u>current</u> economy – By demographics

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?

Not important (0-3)
Neutral (4-6)
Important (7-10)

National Mean
8.8

Chart values: 0: 0%, 1: 0%, 2: 0%, 3: 1%, 4: 1%, 5: 2%, 6: 5%, 7: 11%, 8: 15%, 9: 10%, 10: 52%, Unsure: 3%

	Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
Mean	9.0	8.5	8.7	9.1	8.7
	Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
	8.8	8.7	8.4	8.8	9.0
	Usually votes LPC (n=368)	Usually votes CPC (n=296)	Usually votes NDP (n=130)	Left-leaning (n=238)	Right-leaning (n=254)
	8.6	9.5	8.0	7.8	9.6

*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, January 31st to February 3rd, 2025, n=1077, accurate 3.0 percentage points plus or minus, 19 times out of 20.

POSITIVE **ENERGY** NANOS

Reason for opinion on importance of oil & gas to Canada's <u>current</u> economy

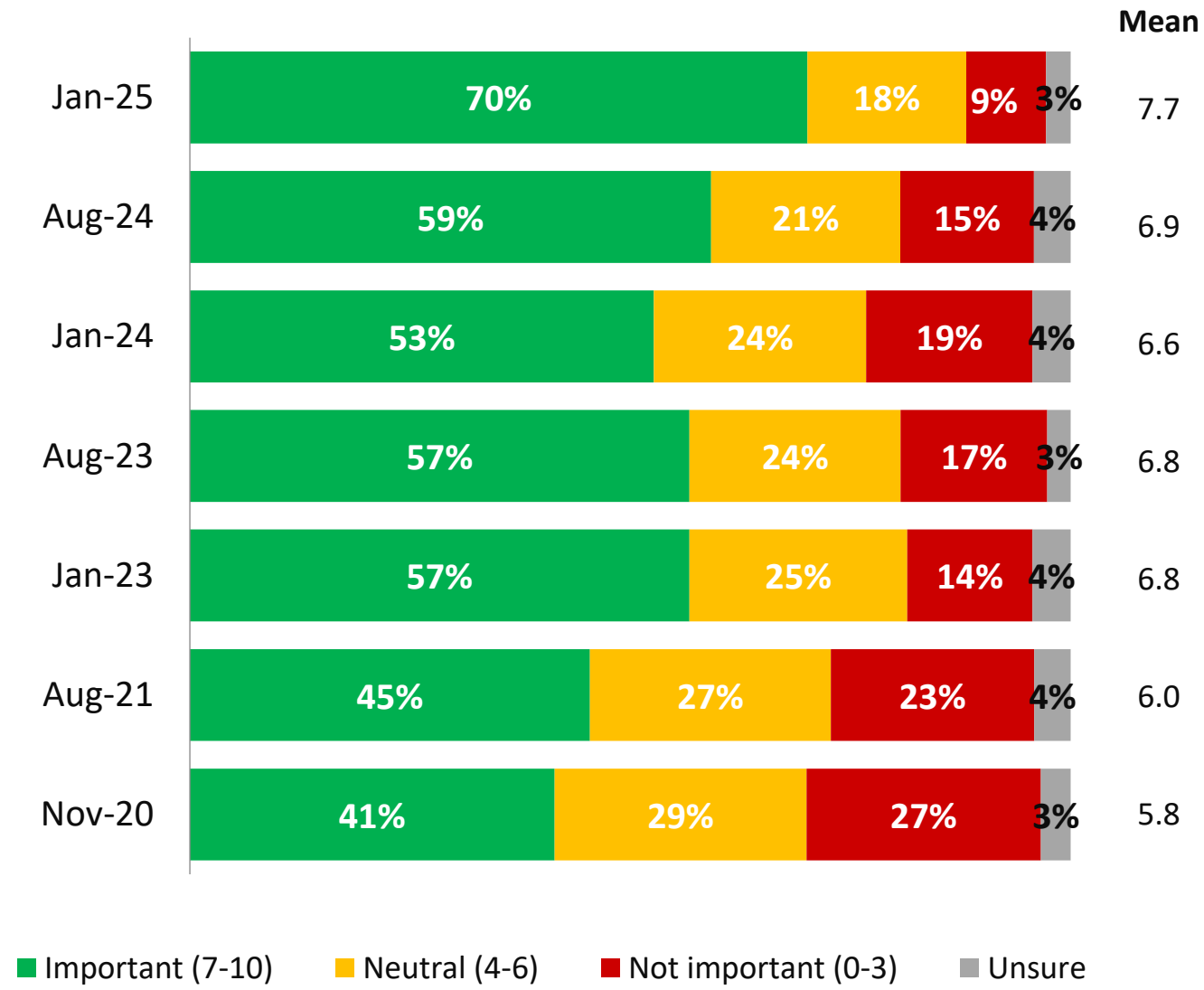| Q – Why do you have that opinion? [OPEN]	Total			Important (7-10)			Neutral (4-6)			Not Important (0-3)		
	2025-01 (n=766)	2024-08 (n=873)	2024-01 (n=941)	2025-01 (n=683)	2024-08 (n=702)	2024-01 (n=721)	2025-01 (n=64)	2024-08 (n=133)	2024-01 (n=170)	2025-01 (n=9)*	2024-08 (n=21)*	2024-01 (n=37)
Contributes/tied to Canadian/provincial economy, exports, jobs	38.5%	28.2%	25.0%	41.6%	31.1%	29.9%	15.2%	19.1%	12.8%			7.9%
Should be exploited more/exporting more and importing less/energy independence	9.7%	7.5%	7.7%	10.3%	9.2%	8.9%	5.1%	0.6%	3.8%			6.1%
Oil and gas are important Canadian natural resources/we have a lot of it/produce it	9.2%	12.6%	4.0%	10.2%	15.3%	4.6%	2.0%	2.5%	3.1%			-
Need to look into more sustainable, renewable and greener options (solar, wind, tidal etc.)	5.4%	7.5%	5.1%	3.5%	3.5%	1.6%	20.5%	24.5%	14.5%			25.1%
Important for Alberta/west in particular	4.5%	5.6%	7.1%	4.3%	4.6%	7.0%	6.6%	10.9%	7.0%			9.4%
Every country needs it/high in demand	4.0%	-	-	4.5%	-	-	-	-	-			-
We do not have/have not yet developed a reliable alternative/the transition to renewables is too slow	3.8%	6.6%	6.9%	3.1%	8.2%	7.6%	11.1%	0.6%	6.1%			2.2%
Can be used as leverage/important in trade war with the US	3.3%	-	-	3.6%	-	-	1.3%	-	-			-
Needed for our lifestyle and the cold weather (vehicle and transportation, heating etc.)	3.2%	6.1%	10.3%	3.7%	7.4%	12.7%	-	1.5%	4.4%			-
We are still reliant/dependent on it	3.0%	8.7%	9.6%	3.3%	10.0%	12.3%	1.3%	3.8%	1.9%			-
Other	1.8%	0.5%	1.7%	1.8%	0.6%	1.1%	1.4%	-	2.8%			4.7%
Unsure	0.6%	0.9%	1.8%	0.3%	0.3%	0.4%	3.3%	-	3.4%			-

TOP RESPONSES

*Shaded due to small sample size

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 31st to February 3rd, 2025, n=766, accurate 3.6 percentage points plus or minus, 19 times out of 20.

POSITIVE ENERGY (n) NANOS

Importance of oil and gas to Canada's <u>future</u> economy

Seven in ten Canadians (70%) now say oil and gas is important to Canada's future economy, an increase of 11 percentage points since the previous wave in August 2024 and 29 percentage points higher than the 2020 benchmark. Those who identify as right-leaning give this a higher mean importance score (9.2) than those who identify as left-leaning (5.7).

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?

Mean

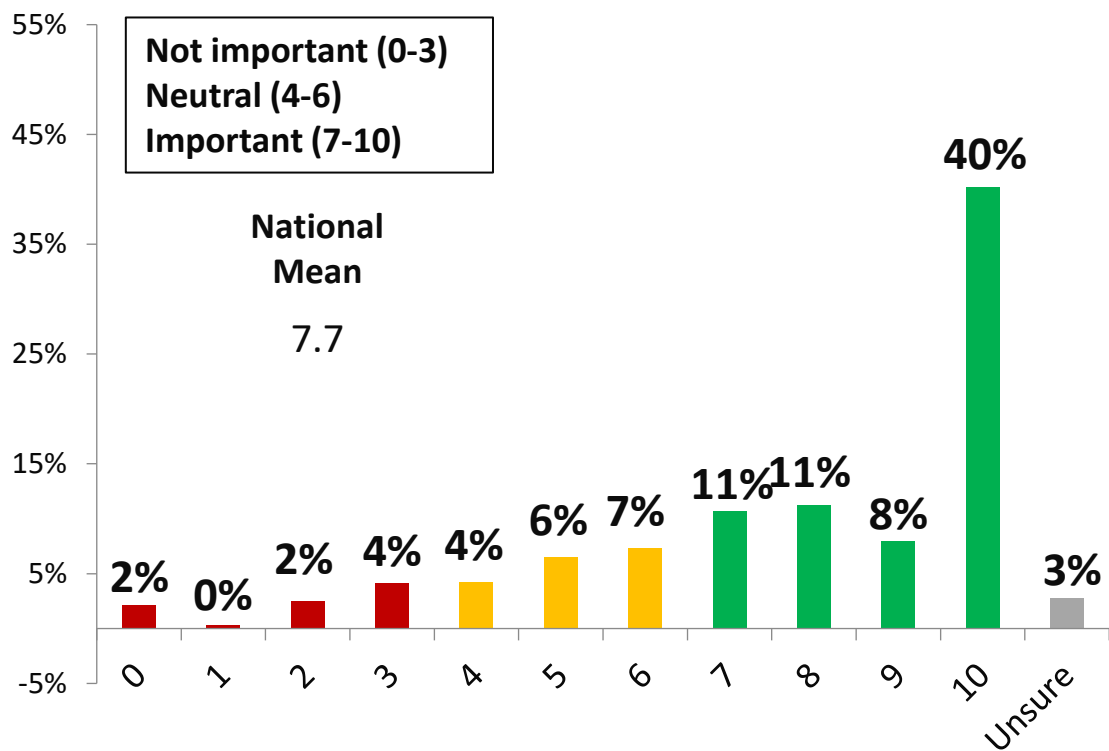| Date	Important (7-10)	Neutral (4-6)	Not important (0-3)	Unsure	Mean
Jan-25	70%	18%	9%	3%	7.7
Aug-24	59%	21%	15%	4%	6.9
Jan-24	53%	24%	19%	4%	6.6
Aug-23	57%	24%	17%	3%	6.8
Jan-23	57%	25%	14%	4%	6.8
Aug-21	45%	27%	23%	4%	6.0
Nov-20	41%	29%	27%	3%	5.8

■ Important (7-10)　■ Neutral (4-6)　■ Not important (0-3)　■ Unsure

*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, January 31st to February 3rd, 2025, n=1077, accurate 3.0 percentage points plus or minus, 19 times out of 20.

POSITIVE ENERGY　ⓝ NANOS

Importance of oil and gas to Canada's <u>future</u> economy – By demographics

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?

Not important (0-3)
Neutral (4-6)
Important (7-10)

National Mean

7.7

Chart values (scale 0 to 10 plus Unsure):
- 0: 2%
- 1: 0%
- 2: 2%
- 3: 4%
- 4: 4%
- 5: 6%
- 6: 7%
- 7: 11%
- 8: 11%
- 9: 8%
- 10: 40%
- Unsure: 3%

Mean

Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
7.8	7.1	7.9	8.3	7.5

Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
7.8	7.7	7.2	7.9	7.9

Usually votes LPC (n=368)	Usually votes CPC (n=296)	Usually votes NDP (n=130)	Left-leaning (n=238)	Right-leaning (n=254)
7.5	9.3	5.7	5.7	9.2

*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, January 31st to February 3rd, 2025, n=1077, accurate 3.0 percentage points plus or minus, 19 times out of 20.

POSITIVE ENERGY · NANOS

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)		
	2025-01 (n=759)	2024-08 (n=849)	2024-01 (n=922)	2025-01 (n=529)	2024-08 (n=508)	2024-01 (n=495)	2025-01 (n=145)	2024-08 (n=194)	2024-01 (n=216)	2025-01 (n=73)	2024-08 (n=123)	2024-01 (n=182)
Remains a large part of Canada's economy/still contributing to Canada's economy	20.1%	20.2%	13.3%	29.5%	33.1%	23.2%	0.6%	2.9%	3.9%	-	0.5%	1.9%
Moving towards clean energy/reducing reliance on fossil fuels	19.4%	31.0%	25.1%	8.1%	9.7%	6.2%	49.4%	64.5%	47.8%	38.5%	65.8%	45.2%
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	16.1%	10.6%	13.3%	22.4%	14.9%	17.4%	3.4%	6.6%	12.6%	-	0.6%	6.1%
Oil and gas remains the main energy source/key resource in Canada/nothing can/will replace oil and gas	12.6%	16.9%	18.2%	17.8%	24.5%	31.5%	0.6%	8.3%	5.1%	3.8%	4.1%	1.8%
Need to shift energy sources to control climate change	8.9%	5.5%	7.8%	1.5%	1.3%	1.1%	22.3%	8.3%	9.5%	32.9%	17.4%	23.9%
Renewable energy sources can help diversify the economy and energy supply	4.7%	0.9%	5.0%	2.8%	1.2%	2.5%	9.3%	-	8.6%	8.9%	1.1%	7.8%
This is just what I hope/common sense	3.6%	1.8%	1.0%	2.3%	0.8%	0.9%	5.0%	1.2%	0.6%	9.4%	6.1%	1.6%
Canada produces cleaner fossil fuels than other countries, so we should continue to produce	3.0%	0.9%	1.3%	4.4%	1.5%	2.4%	-	-	-	-	-	-
Products (plastics, petroleum products, manufacturing) will still be needed	2.4%	2.2%	4.6%	2.8%	2.8%	6.1%	2.4%	2.5%	4.5%	-	-	1.1%
Our reserves will eventually be depleted	2.2%	1.0%	1.9%	1.0%	0.7%	0.3%	5.7%	-	0.8%	2.5%	3.7%	7.7%
Other	2.6%	2.1%	2.4%	2.6%	3.1%	2.0%	0.7%	1.0%	3.8%	3.9%	0.6%	1.9%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 31st to February 3rd, 2025, n=759, accurate 3.6 percentage points plus or minus, 19 times out of 20.
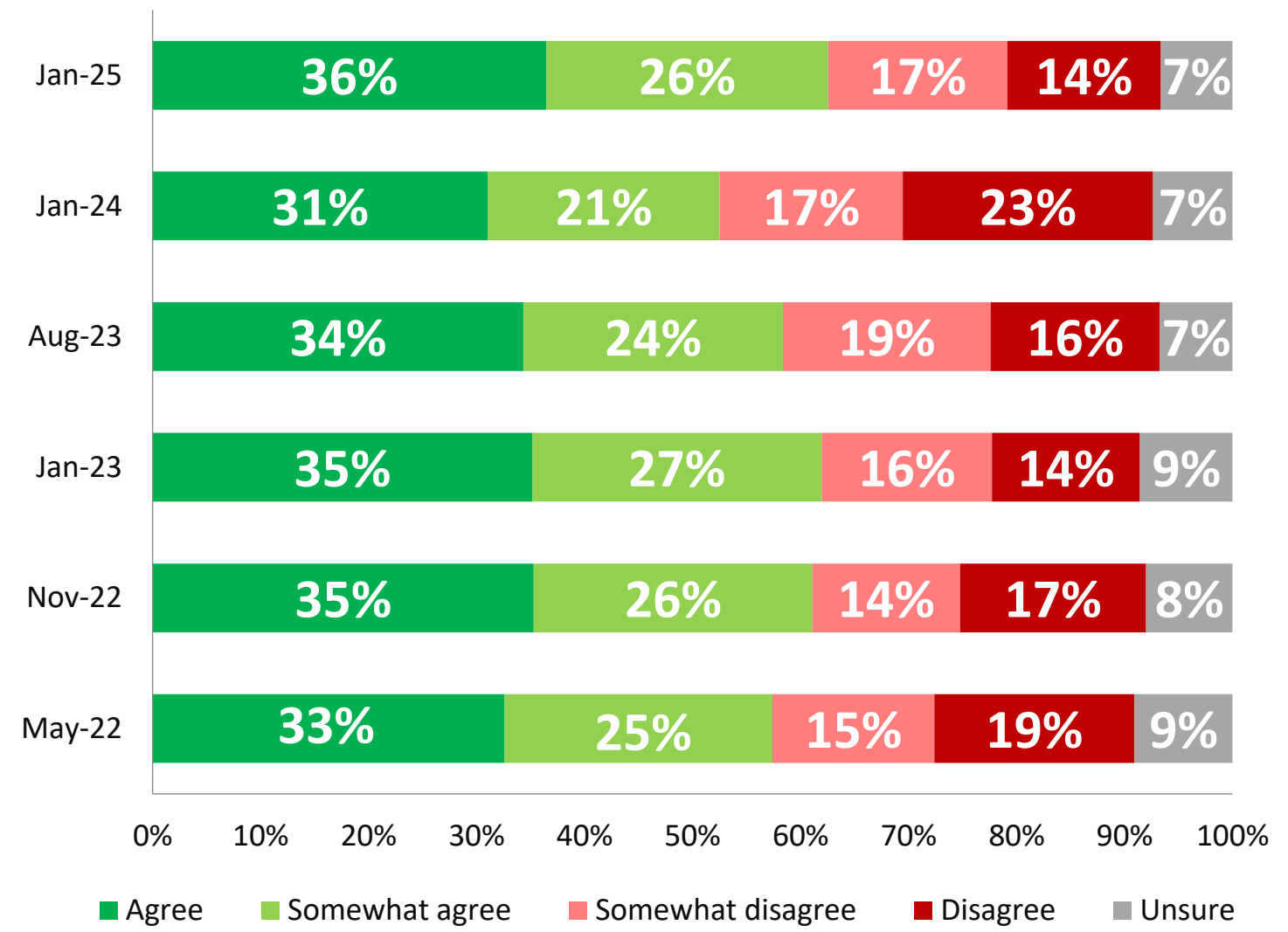
POSITIVE ENERGY | NANOS

Oil and gas exports for security and 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 energy supplies, which is a 10-percentage point increase compared to the previous wave in January 2024 (52% agree or somewhat agree). Agreement is much higher among those who identify as right-leaning politically (87%) than left-leaning (31%).

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?**

	Agree	Somewhat agree	Somewhat disagree	Disagree	Unsure
Jan-25	36%	26%	17%	14%	7%
Jan-24	31%	21%	17%	23%	7%
Aug-23	34%	24%	19%	16%	7%
Jan-23	35%	27%	16%	14%	9%
Nov-22	35%	26%	14%	17%	8%
May-22	33%	25%	15%	19%	9%

*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, January 31st to February 3rd, 2025, n=1077, accurate 3.0 percentage points plus or minus, 19 times out of 20.

POSITIVE **ENERGY** NANOS

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

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?
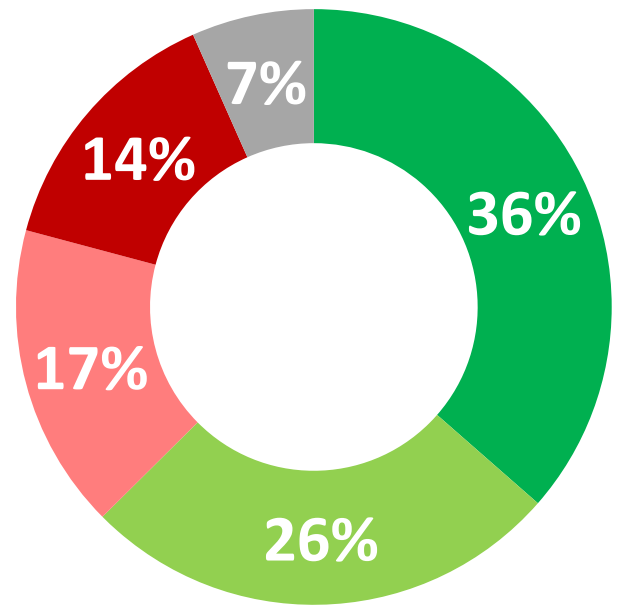
- ■ Agree
- ■ Somewhat agree
- ■ Somewhat disagree
- ■ Disagree
- ■ Unsure

Agree/ Somewhat agree

Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
64.8%	46.8%	64.7%	81.9%	57.6%
Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
69.7%	55.7%	58.9%	66.7%	61.7%
Usually votes LPC (n=368)	Usually votes CPC (n=296)	Usually votes NDP (n=130)	Left-leaning (n=238)	Right-leaning (n=254)
57.5%	90.0%	36.9%	30.9%	86.7%

*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, January 31st to February 3rd, 2025, n=1077, accurate 3.0 percentage points plus or minus, 19 times out of 20.

POSITIVE ENERGY NANOS
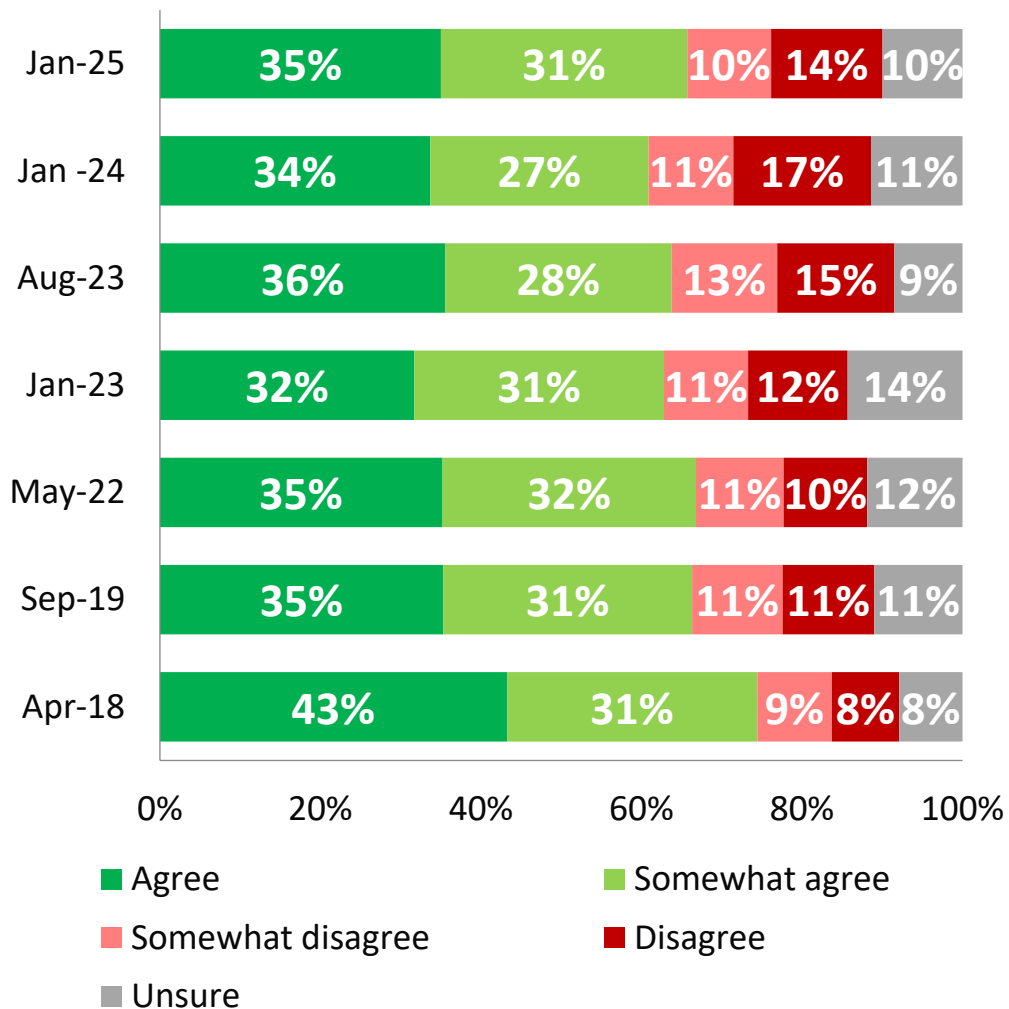
Level of agreement that Canada's oil and gas exports can contribute to combatting global climate change if they displace other energy sources that are more damaging to the climate
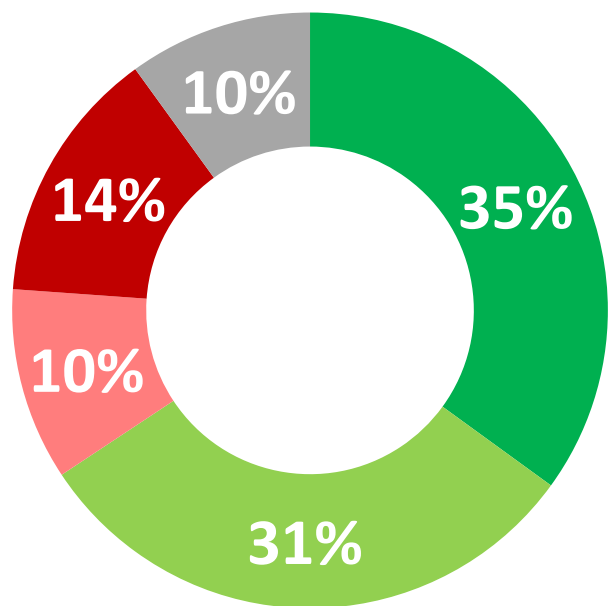
	Agree	Somewhat agree	Somewhat disagree	Disagree	Unsure
Jan-25	35%	31%	10%	14%	10%
Jan-24	34%	27%	11%	17%	11%
Aug-23	36%	28%	13%	15%	9%
Jan-23	32%	31%	11%	12%	14%
May-22	35%	32%	11%	10%	12%
Sep-19	35%	31%	11%	11%	11%
Apr-18	43%	31%	9%	8%	8%

0% 20% 40% 60% 80% 100%

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

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

Canadians are almost 3 times as likely

to agree or somewhat agree (35% agree; 31% somewhat agree) that Canada's oil and gas sector can contribute to combatting global climate change compared with disagree or somewhat disagree (14% disagree; 10% somewhat disagree). The proportion of those who outright agree is consistent with the previous waves of research. Right-leaning Canadians are significantly more likely to agree or somewhat agree with this (82%) than left-leaning Canadians (44%).

Q – Do you agree, somewhat agree, somewhat disagree or disagree with the following statement: **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?**

POSITIVE ENERGY   NANOS

Agreement that Canada's oil and gas exports can contribute to combatting global climate change – By demographics

Q – Do you agree, somewhat agree, somewhat disagree or disagree with the following statement: 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

Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
70.8%	51.0%	67.8%	78.9%	65.0%
Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
71.5%	60.1%	58.3%	67.8%	68.8%
Usually votes LPC (n=368)	Usually votes CPC (n=296)	Usually votes NDP (n=130)	Left-leaning (n=238)	Right-leaning (n=254)
65.9%	84.7%	43.1%	43.6%	81.6%

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

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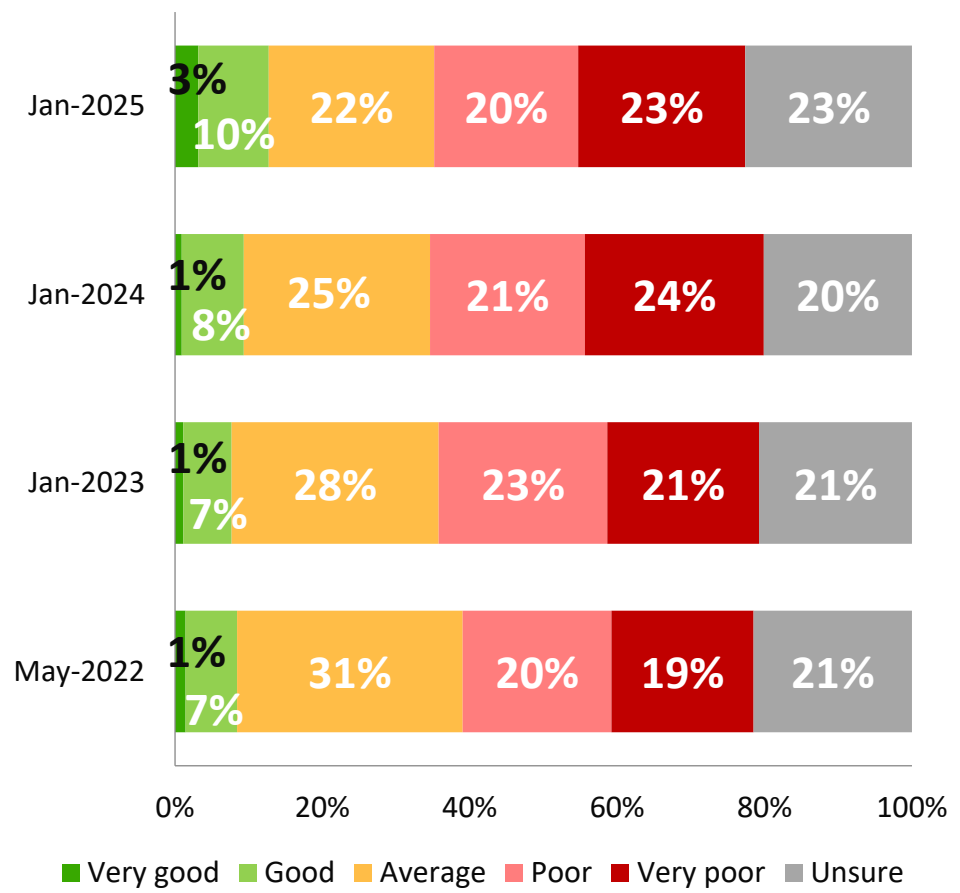
POSITIVE ENERGY NANOS

Investment environment for energy projects

Job done by governments in Canada at providing a supportive policy/regulatory environment for investors building energy infrastructure

Chart

Wave	Very good	Good	Average	Poor	Very poor	Unsure
Jan-2025	3%	10%	22%	20%	23%	23%
Jan-2024	1%	8%	25%	21%	24%	20%
Jan-2023	1%	7%	28%	23%	21%	21%
May-2022	1%	7%	31%	20%	19%	21%

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

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

Close to **1 in 2** Canadians

say that the job done by governments in Canada at providing a clear, predictable and competitive policy and regulatory environment for investors building energy infrastructure to help Canada meet its climate objectives is very poor (23%) or poor (20%), consistent with the previous wave in January 2024.

Of note, residents of the Prairies are twice as likely (57%) than those from Quebec (27%) to say the government is doing a very poor/poor job. Additionally, right-leaning Canadians are more likely to say a poor or very poor job is being done (52%) than left-leaning Canadians (34%).

Q – Do governments in Canada do a very good, good, average, poor or very poor job at providing a clear, predictable and competitive policy and regulatory environment for investors building energy infrastructure to help Canada meet its climate change targets?

POSITIVE ENERGY · NANOS

Job done by governments in Canada at providing a supportive policy/regulatory environment for investors building energy infrastructure – By demographics

Q – Do governments in Canada do a very good, good, average, poor or very poor job at providing a clear, predictable and competitive policy and regulatory environment for investors building energy infrastructure to help Canada meet its climate change targets?

3% 10% 22% 20% 23% 23%
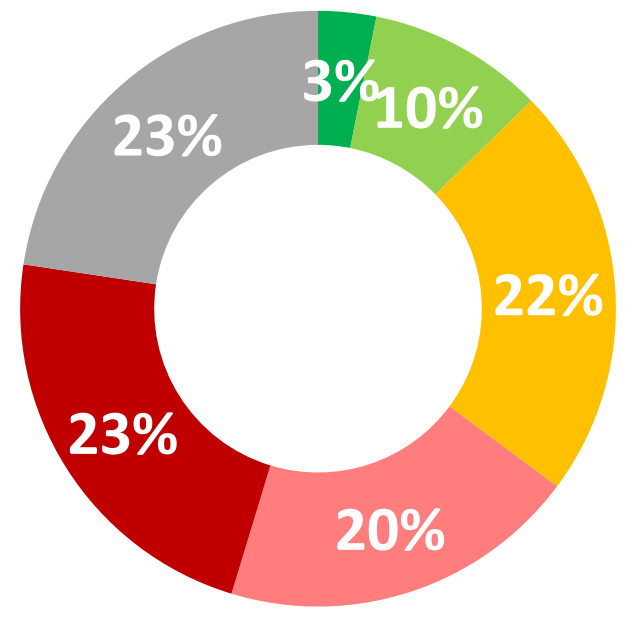
- ■ Very good
- ■ Good
- ■ Average
- ■ Poor
- ■ Very poor
- ■ Unsure

	Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
Very poor/ poor	39.0%	26.7%	45.3%	56.8%	42.6%
	Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
	49.6%	35.1%	39.2%	40.1%	45.8%
	Usually votes LPC (n=368)	Usually votes CPC (n=296)	Usually votes NDP (n=130)	Left-leaning (n=238)	Right-leaning (n=254)
	31.1%	60.7%	40.7%	33.5%	52.3%

*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, January 31st to February 3rd, 2025, n=1077, accurate 3.0 percentage points plus or minus, 19 times out of 20.

POSITIVE ENERGY NANOS

Reasons for impression of job done by governments in Canada at providing a supportive policy/regulatory environment for investors building energy infrastructure
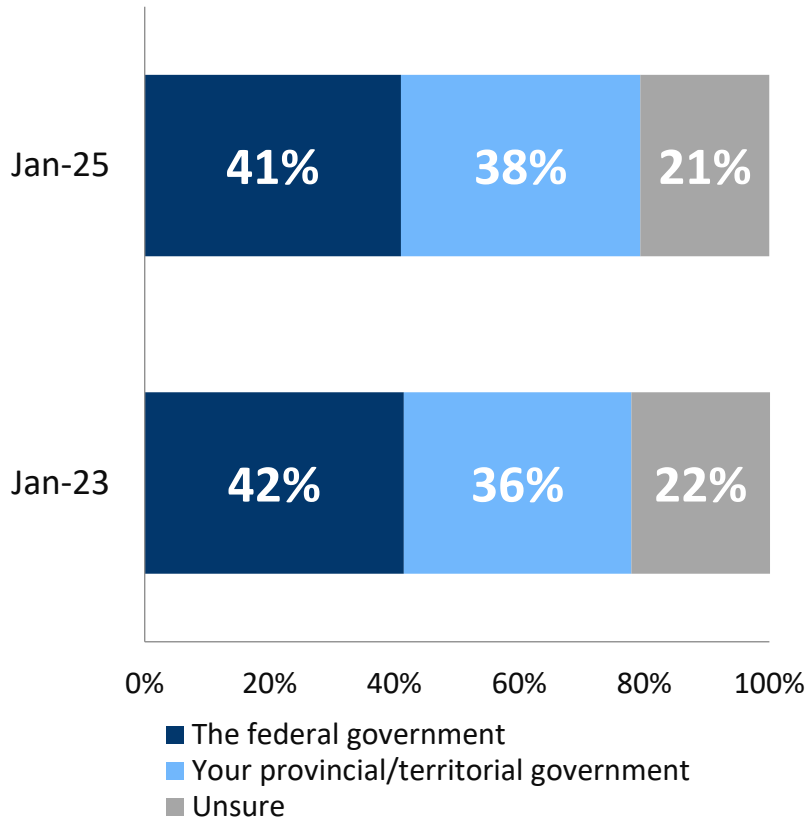
Q – Why do you have that opinion? [OPEN]

TOP RESPONSES	Total			Very good/good			Average			Very poor/poor		
	2025-01 (n=643)	2024-01 (n=785)	2022-05 (n=769)	2025-01 (n=81)	2024-01 (n=59)	2022-05 (n=68)	2025-01 (n=129)	2024-01 (n=209)	2022-05 (n=231)	2025-01 (n=321)	2024-01 (n=406)	2022-05 (n=338)
I don't know enough about this/not enough transparency for the public to know	**17.4%**	11.7%	14.6%	-	4.6%	3.2%	**9.9%**	4.6%	8.7%	**8.2%**	3.0%	5.1%
Governments in Canada are slow/they are followers/creating red tape	**14.2%**	10.7%	8.2%	**5.9%**	-	3.9%	**13.4%**	6.9%	8.0%	**22.2%**	16.9%	11.5%
Economy is more of a priority for the governments than the environment/priorities change	**7.7%**	8.5%	6.2%	-	9.6%	4.2%	**11.2%**	11.9%	5.5%	**11.2%**	8.6%	8.9%
They could do more/do better/not enough action/focused on other priorities	**5.6%**	7.9%	17.3%	**2.9%**	3.1%	12.4%	**6.4%**	17.8%	26.0%	**7.6%**	5.3%	17.3%
It differs between provinces/some provinces are worse than others/lack of cooperation between provinces and federal government	**5.4%**	7.4%	10.8%	**1.7%**	5.3%	13.6%	**5.8%**	9.6%	11.5%	**7.7%**	8.0%	12.3%
Not enough renewable energy production/not enough alternatives/funding	**4.3%**	1.4%	-	**5.8%**	1.6%	-	**5.5%**	1.4%	-	**4.4%**	1.7%	-
Oil and gas pollute a lot/are still bad for the environment	**4.0%**	N/A	N/A	-	N/A	N/A	**5.2%**	N/A	N/A	**4.9%**	N/A	N/A
We are better than other countries/other countries need to take action	**4.0%**	1.6%	1.6%	**15.7%**	5.3%	3.7%	**6.6%**	0.5%	1.3%	**0.3%**	2.1%	2.2%
They are taking action/doing something/moving in the right direction	**3.6%**	3.6%	3.8%	**24.3%**	35.2%	30.6%	**1.4%**	3.0%	2.6%	**0.4%**	0.3%	0.3%
Other	**4.5%**	2.9%	6.8%	**15.3%**	5.8%	6.1%	**5.3%**	4.1%	8.5%	**2.6%**	2.5%	6.6%
Unsure	**3.8%**	3.6%	4.1%	**1.5%**	-	-	**4.4%**	2.2%	1.1%	**0.4%**	0.3%	0.9%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 31st to February 3rd, 2025, n=1077, accurate 3.0 percentage points plus or minus, 19 times out of 20.

POSITIVE ENERGY   NANOS

Government most trusted at creating a positive environment for investors building energy infrastructure

Q – Which level of government do you trust most at creating a positive environment for investors building energy infrastructure to help Canada meet its climate change targets? [ROTATE]

	Jan-25		
	41%	38%	21%
	Jan-23		
	42%	36%	22%

Scale: 0% 20% 40% 60% 80% 100%

- ■ The federal government
- ■ Your provincial/territorial government
- ■ Unsure

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

The federal government

	Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
	37.8%	38.3%	48.9%	38.4%	28.5%
	Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
	37.2%	44.7%	42.7%	37.9%	42.3%
	Usually votes LPC (n=368)	Usually votes CPC (n=296)	Usually votes NDP (n=130)	Left-leaning (n=238)	Right-leaning (n=254)
	65.9%	17.2%	56.5%	60.6%	21.1%

The provincial government

	Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
	47.2%	41.9%	27.5%	49.3%	44.5%
	Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
	43.8%	33.1%	41.0%	35.3%	39.0%
	Usually votes LPC (n=368)	Usually votes CPC (n=296)	Usually votes NDP (n=130)	Left-leaning (n=238)	Right-leaning (n=254)
	21.9%	59.1%	28.0%	26.9%	53.9%

POSITIVE ENERGY n NANOS

Federal-provincial collaboration on energy and climate
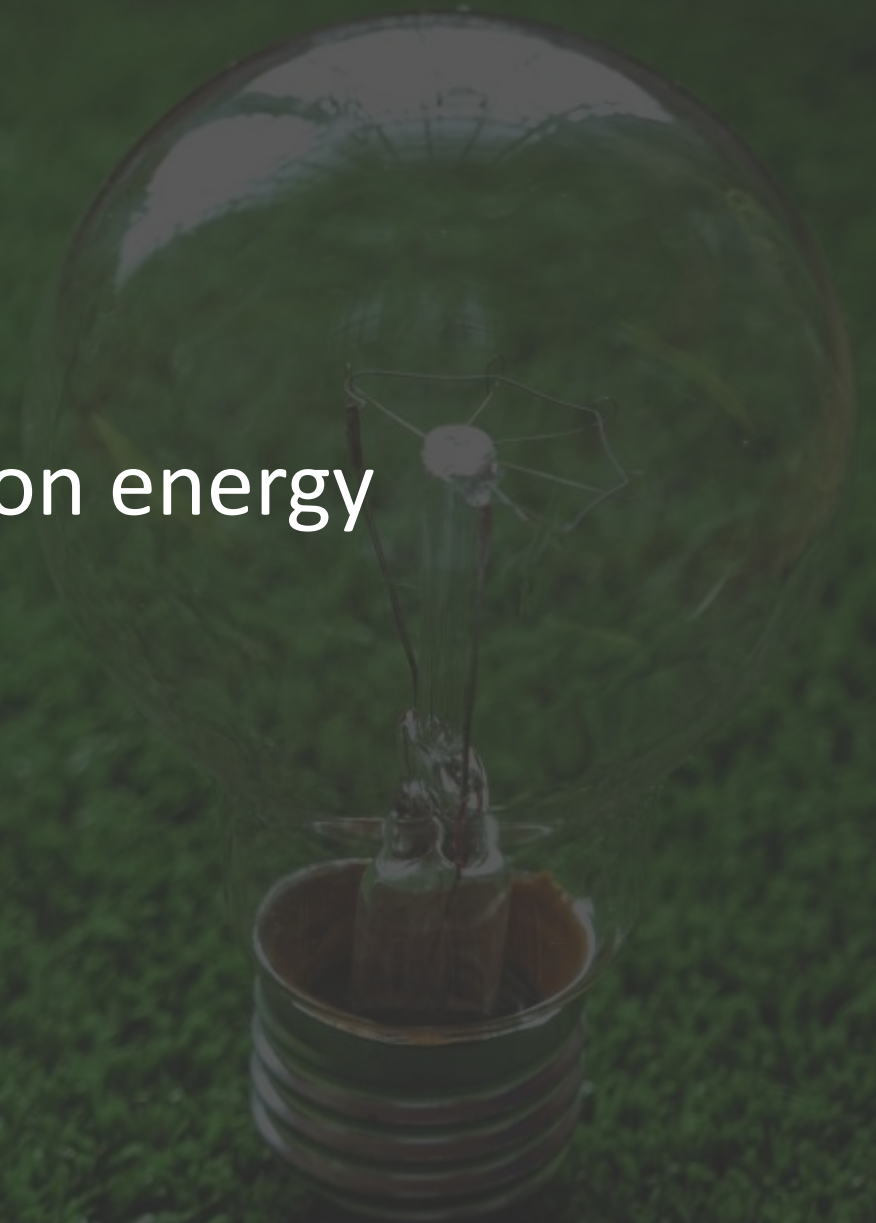
Job done by federal and provincial governments cooperating on decision-making on energy

Jan-2025: 8% | 33% | 32% | 21% | 6%
Jan-2024: 7% | 31% | 34% | 23% | 4%
Jan-2023: 5% | 33% | 34% | 23% | 5%
May-2021: 9% | 35% | 37% | 16% | 2%

Legend: Very good, Good, Average, Poor, Very poor, Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.
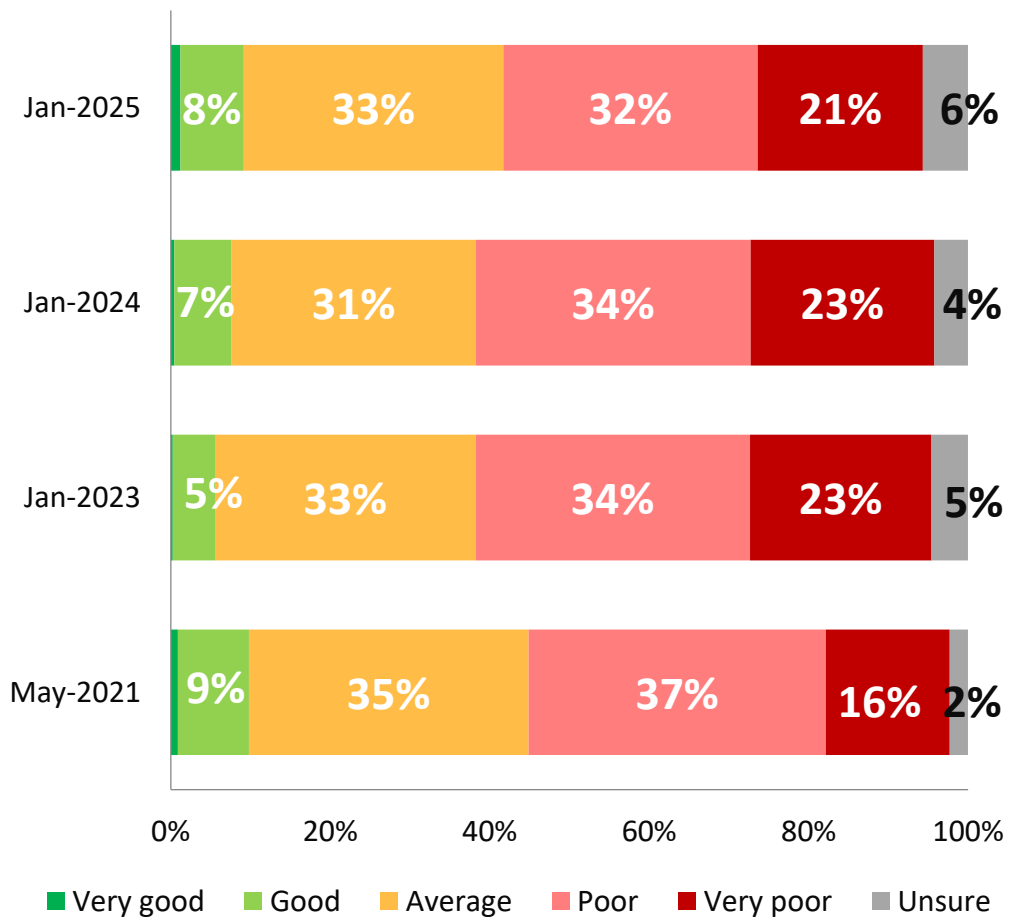
Consistent with the previous waves, Canadians are six times more likely to think the federal and provincial governments do a very poor (21%) or poor (32%) job of cooperating on decision making on energy rather than a very good (1%) or good one (8%).

Residents of the Prairies are more likely to rate the job done as very poor/poor (78%) than residents of Ontario (54%), BC (51%) or Quebec (36%). Politically right-leaning Canadians are more likely to rate the job done as poor or very poor (66%) than left-leaning Canadians (44%).

Q – Do you think federal and provincial governments together are doing a very good, good, average, poor, or very poor job cooperating on: **Decision-making on energy**

POSITIVE ENERGY | NANOS

Job done by federal and provincial governments cooperating on decision-making on energy – By demographics

Q – Do you think federal and provincial governments together are doing a very good, good, average, poor, or very poor job cooperating on: **Decision-making on energy**

Legend:
- ■ Very good
- ■ Good
- ■ Average
- ■ Poor
- ■ Very poor
- ■ Unsure

Donut chart values: 1%, 8%, 33%, 32%, 21%, 6%

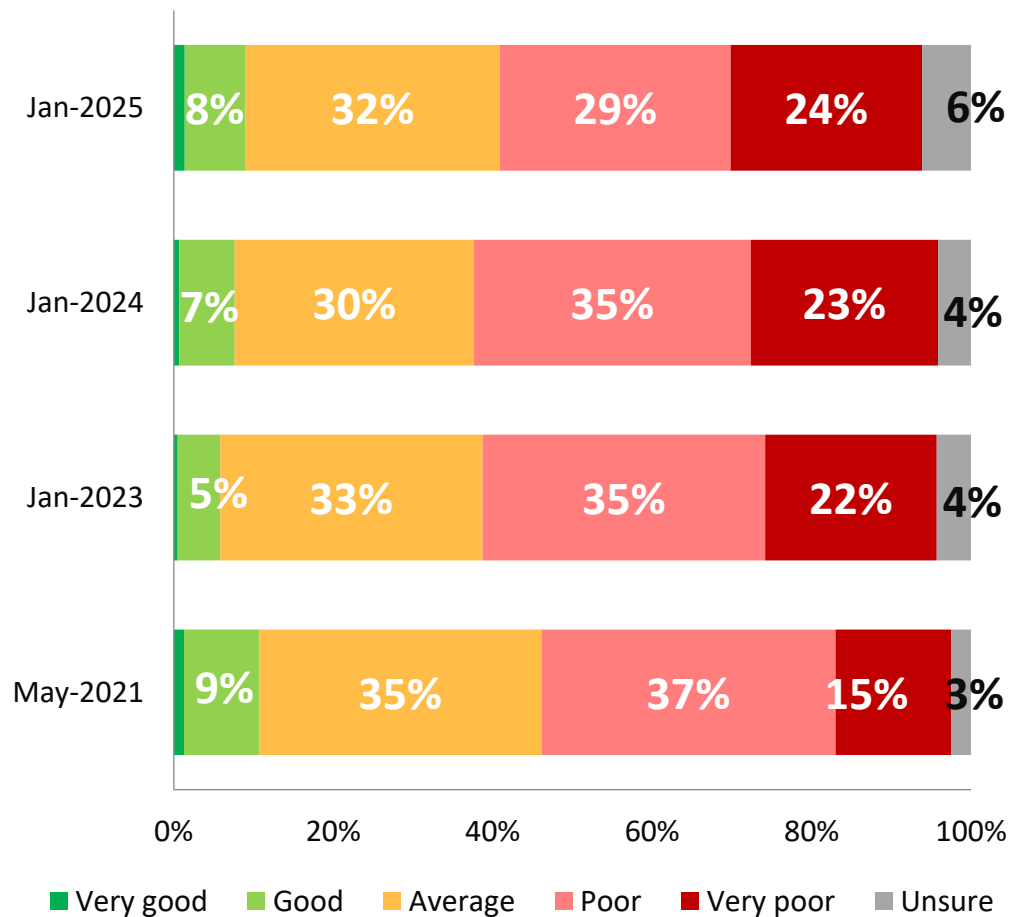| Very poor/ poor	Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
	42.1%	35.6%	53.5%	78.2%	51.4%
	Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
	56.8%	48.6%	52.7%	55.6%	50.2%
	Usually votes LPC (n=368)	Usually votes CPC (n=296)	Usually votes NDP (n=130)	Left-leaning (n=238)	Right-leaning (n=254)
	39.8%	71.4%	44.7%	44.1%	66.1%

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

POSITIVE ENERGY NANOS

Job done by federal and provincial governments cooperating on decision-making on climate change

Jan-2025 8% | 32% | 29% | 24% | 6%

Jan-2024 7% | 30% | 35% | 23% | 4%

Jan-2023 5% | 33% | 35% | 22% | 4%

May-2021 9% | 35% | 37% | 15% | 3%

0%   20%   40%   60%   80%   100%

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

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

A majority of Canadians

say the job done by federal and provincial governments cooperating on decision-making on climate change is very poor (24%) or poor (29%) which is a slight decrease from the previous wave in January 2024 (23% very poor; 35% poor).

Of note, residents of the Prairies are again more likely to rate the job done as very poor/poor (75%) than residents of Ontario (56%), BC (53%) or Quebec (37% very poor/poor).

Q – Do you think federal and provincial governments together are doing a very good, good, average, poor, or very poor job cooperating on: **Decision-making on climate change**

POSITIVE **ENERGY**   NANOS

© NANOS RESEARCH

Job done by federal and provincial governments cooperating on decision-making on climate change – By demographics

Q – Do you think federal and provincial governments together are doing a very good, good, average, poor, or very poor job cooperating on: **Decision-making on climate change**

1% **8%**
6%
24%
32%
29%

- 🟩 Very good
- 🟩 Good
- 🟨 Average
- 🟥 Poor
- 🟥 Very poor
- ⬜ Unsure

Very poor/ poor	Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
	34.6%	**36.7%**	**55.9%**	**74.6%**	**53.3%**
	Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
	56.9%	**49.1%**	**54.4%**	**57.2%**	**48.7%**
	Usually votes LPC (n=368)	Usually votes CPC (n=296)	Usually votes NDP (n=130)	Left-leaning (n=238)	Right-leaning (n=254)
	42.1%	**64.9%**	**56.6%**	**48.1%**	**60.9%**

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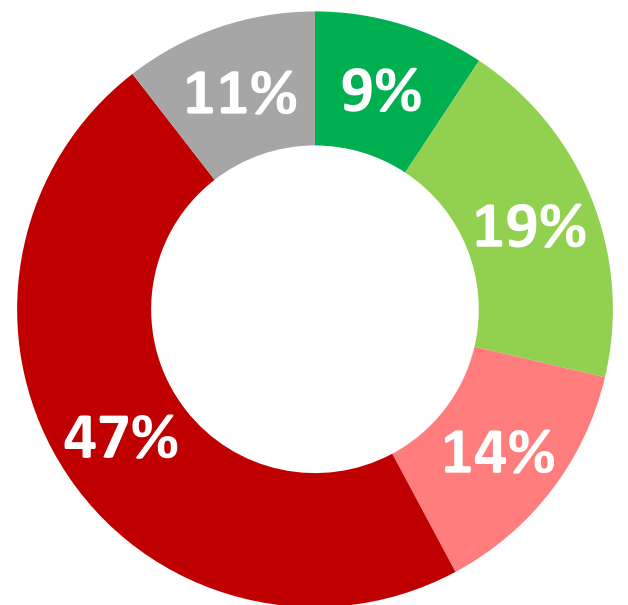*Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 31st to February 3rd, 2025, n=1077, accurate 3.0 percentage points plus or minus, 19 times out of 20.

POSITIVE ENERGY NANOS

Alignment with the United States

Views on aligning Canadian energy policies with those of the United States

Q – Should Canada align, somewhat align, somewhat not align or not align its energy policies with those of the United States.

Align / Somewhat align

Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
27.8%	**16.9%**	**32.4%**	**37.7%**	**26.7%**
Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
35.4%	**22.2%**	**28.3%**	**32.3%**	**26.0%**
Usually votes LPC (n=368)	Usually votes CPC (n=296)	Usually votes NDP (n=130)	Left-leaning (n=238)	Right-leaning (n=254)
19.0%	**57.8%**	**10.7%**	**8.7%**	**59.7%**

Not align / Somewhat not align

Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
56.9%	**75.6%**	**56.7%**	**51.0%**	**62.2%**
Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
56.8%	**64.7%**	**58.9%**	**58.5%**	**63.9%**
Usually votes LPC (n=368)	Usually votes CPC (n=296)	Usually votes NDP (n=130)	Left-leaning (n=238)	Right-leaning (n=254)
71.4%	**28.9%**	**80.7%**	**87.2%**	**27.3%**

Legend: ■ Align ■ Somewhat align ■ Somewhat not align ■ Not align ■ Unsure

*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, January 31st to February 3rd, 2025, n=1077, accurate 3.0 percentage points plus or minus, 19 times out of 20.

POSITIVE **ENERGY**   NANOS

Reasons for views on alignment with the United States on energy policies

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

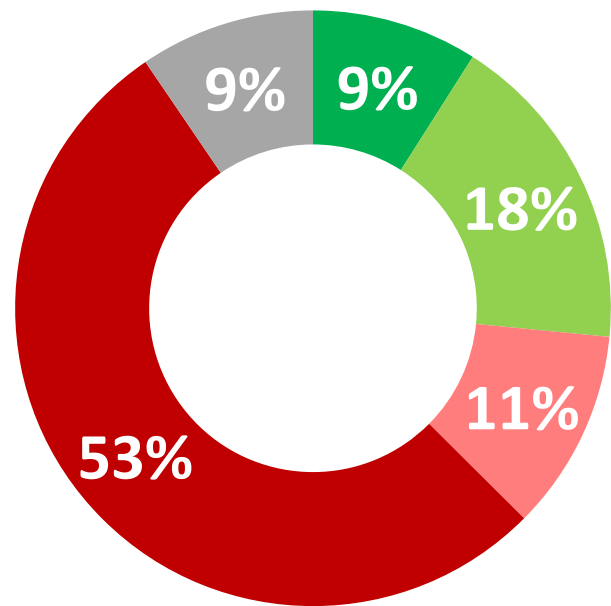|	Total (n=693)	Align/Somewhat align (n=186)	Not align/ Somewhat not align (n=449)	Unsure (n=58)
The current administration's only focus is drilling and profit/they disregard climate change/US policies are bad for the environment	20.0%	3.7%	28.8%	1.6%
Trump can't be trusted/can't trust the US/US policy is unpredictable/unreliable/policies change very often	14.0%	2.8%	18.2%	15.2%
Canada needs to remain independent/we should focus on our own needs/we should have our own policies	12.9%	3.7%	17.3%	6.3%
I dislike Trump/the current administration/the US/not if Trump is the president	9.5%	0.9%	13.0%	7.7%
It is easier if we partner with the US/we need additional help/working together is more effective	6.1%	22.1%	0.7%	-
I am unaware of current energy policies/I don't know enough	5.0%	-	0.9%	50.3%
To improve the economy/it is important to the economy	4.9%	17.3%	0.7%	-
We have different values/interests	4.1%	1.5%	5.6%	-
We are neighbours/shared energy infrastructure/we are intertwined	4.0%	13.1%	0.9%	-
Other	4.0%	6.7%	3.3%	1.2%
Unsure	1.5%	-	0.8%	11.1%

TOP RESPONSES

POSITIVE ENERGY   NANOS

Views on aligning Canadian climate policies with those of the United States

Q – Should Canada align, somewhat align, somewhat not align or not align its climate policies with those of the United States.

- Align
- Somewhat align
- Somewhat not align
- Not align
- Unsure

9%
18%
11%
53%
9%

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

Align/ Somewhat align

Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
27.7%	14.8%	30.2%	35.8%	23.5%
Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
33.0%	20.3%	25.6%	29.3%	24.9%
Usually votes LPC (n=368)	Usually votes CPC (n=296)	Usually votes NDP (n=130)	Left-leaning (n=238)	Right-leaning (n=254)
17.2%	55.1%	9.9%	9.3%	59.3%

Not align/ Somewhat not align

Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
62.3%	78.7%	61.2%	51.6%	63.5%
Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
60.5%	67.3%	64.3%	61.7%	65.6%
Usually votes LPC (n=368)	Usually votes CPC (n=296)	Usually votes NDP (n=130)	Left-leaning (n=238)	Right-leaning (n=254)
76.4%	33.0%	80.3%	85.7%	30.2%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 31st to February 3rd, 2025, n=1077, accurate 3.0 percentage points plus or minus, 19 times out of 20.

POSITIVE ENERGY   NANOS

Reasons for views on alignment with the United States on climate policies

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

|	Total (n=727)	Align/Somewhat align (n=181)	Not align/Somewhat not align (n=491)	Unsure (n=55)
Because of Trump/new administration	26.6%	3.8%	35.5%	18.2%
The US doesn't believe in climate change/they don't have any climate change policy/the US withdrew from Paris Accord/they are going backwards in terms of climate change policy	20.0%	1.9%	27.5%	8.5%
We should be independent/don't need to follow the US/we need to stand on our own	10.7%	3.7%	14.1%	1.8%
I do not trust the US/they do what is best for them/they are now our enemy/tariff war	5.1%	-	6.5%	8.3%
We should be allies/we are partners in other things/we are neighbours	4.9%	20.9%	-	-
We should have a 'North America' approach/we are on the same continent/climate change knows no borders/we can't do it alone/impact will be stronger if we work together	4.7%	16.2%	1.3%	-
The US policies are not clear/I don't know what their policies are	4.0%	1.3%	0.7%	40.5%
Canada has little impact on climate change/doesn't pollute that much compared to others/USA is a bigger polluter	3.8%	11.3%	1.3%	2.8%
Other	3.9%	10.2%	1.8%	2.9%
Unsure	0.6%	0.5%	0.2%	3.7%

TOP RESPONSES

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 31st to February 3rd, 2025, n=1077, accurate 3.0 percentage points plus or minus, 19 times out of 20.

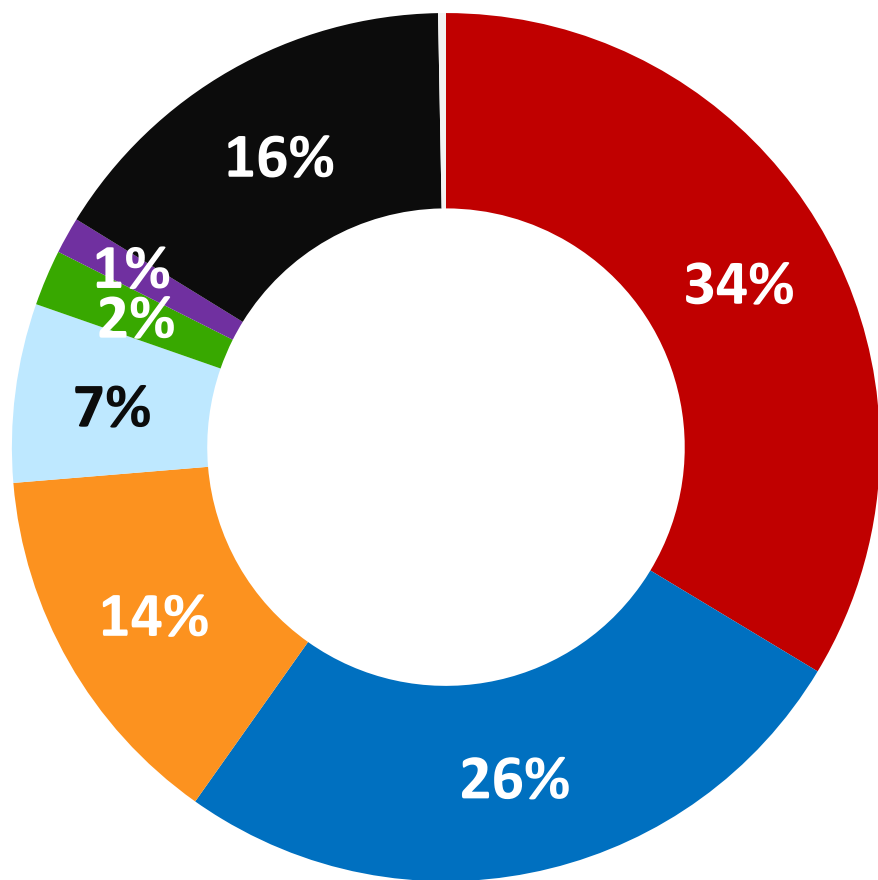POSITIVE ENERGY   NANOS

Political questions

Federal party usually supported – Tracking

Q - Thinking of federal elections, which federal party do you usually vote for [RANDOMIZE]
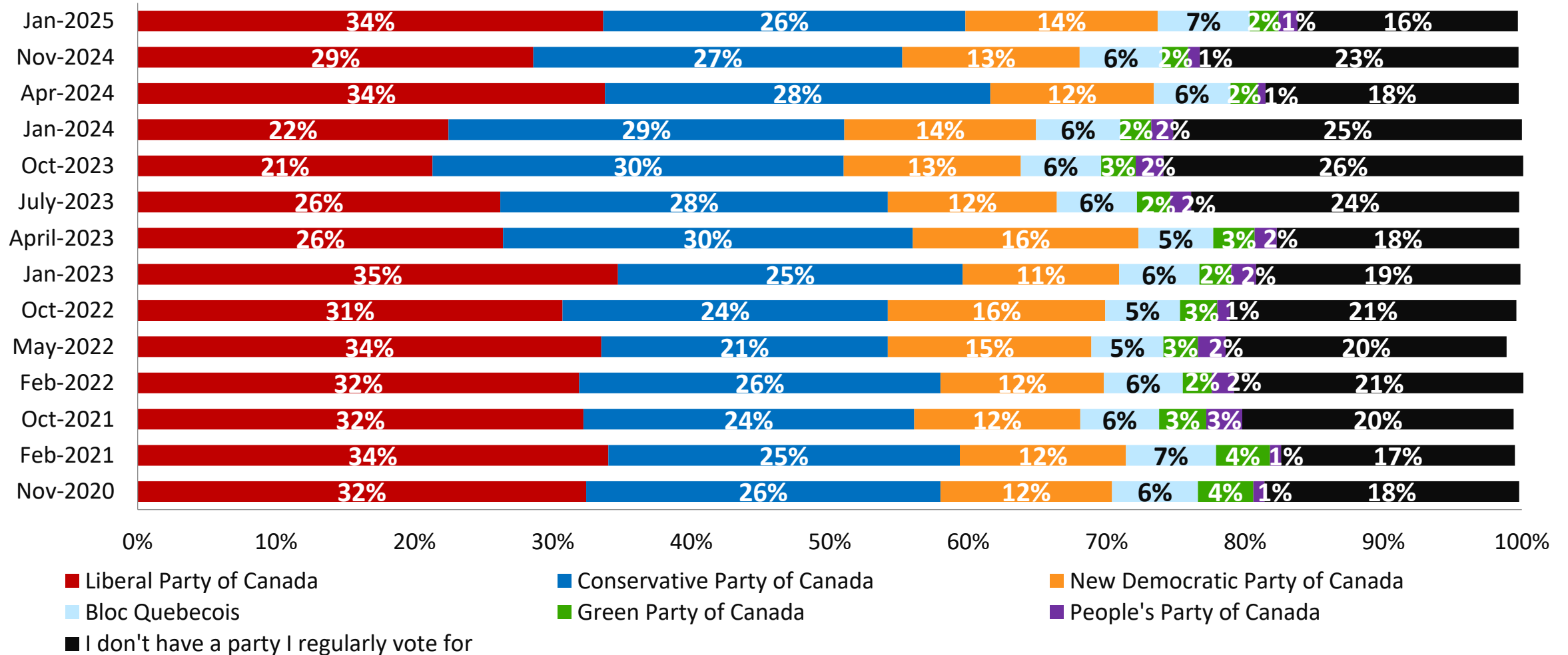
	Liberal Party of Canada	Conservative Party of Canada	New Democratic Party of Canada	Bloc Quebecois	Green Party of Canada	People's Party of Canada	I don't have a party I regularly vote for
Jan-2025	34%	26%	14%	7%	2%	1%	16%
Nov-2024	29%	27%	13%	6%	2%	1%	23%
Apr-2024	34%	28%	12%	6%	2%	1%	18%
Jan-2024	22%	29%	14%	6%	2%	2%	25%
Oct-2023	21%	30%	13%	6%	3%	2%	26%
July-2023	26%	28%	12%	6%	2%	2%	24%
April-2023	26%	30%	16%	5%	3%	2%	18%
Jan-2023	35%	25%	11%	6%	2%	2%	19%
Oct-2022	31%	24%	16%	5%	3%	1%	21%
May-2022	34%	21%	15%	5%	3%	2%	20%
Feb-2022	32%	26%	12%	6%	2%	2%	21%
Oct-2021	32%	24%	12%	6%	3%	3%	20%
Feb-2021	34%	25%	12%	7%	4%	1%	17%
Nov-2020	32%	26%	12%	6%	4%	1%	18%

POSITIVE **ENERGY** · NANOS

Federal party usually supported

- 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

34%
26%
14%
7%
2%
1%
16%

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

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

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 31st to February 3rd, 2025, n=1077, accurate 3.0 percentage points plus or minus, 19 times out of 20.

POSITIVE ENERGY   NANOS

Political views scale

National
Mean

4.9

Left (0-3)
Centre (4-6)
Right (7-10)

0	1	2	3	4	5	6	7	8	9	10	Unsure
5%	3%	6%	11%	12%	24%	12%	10%	7%	2%	4%	5%

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.
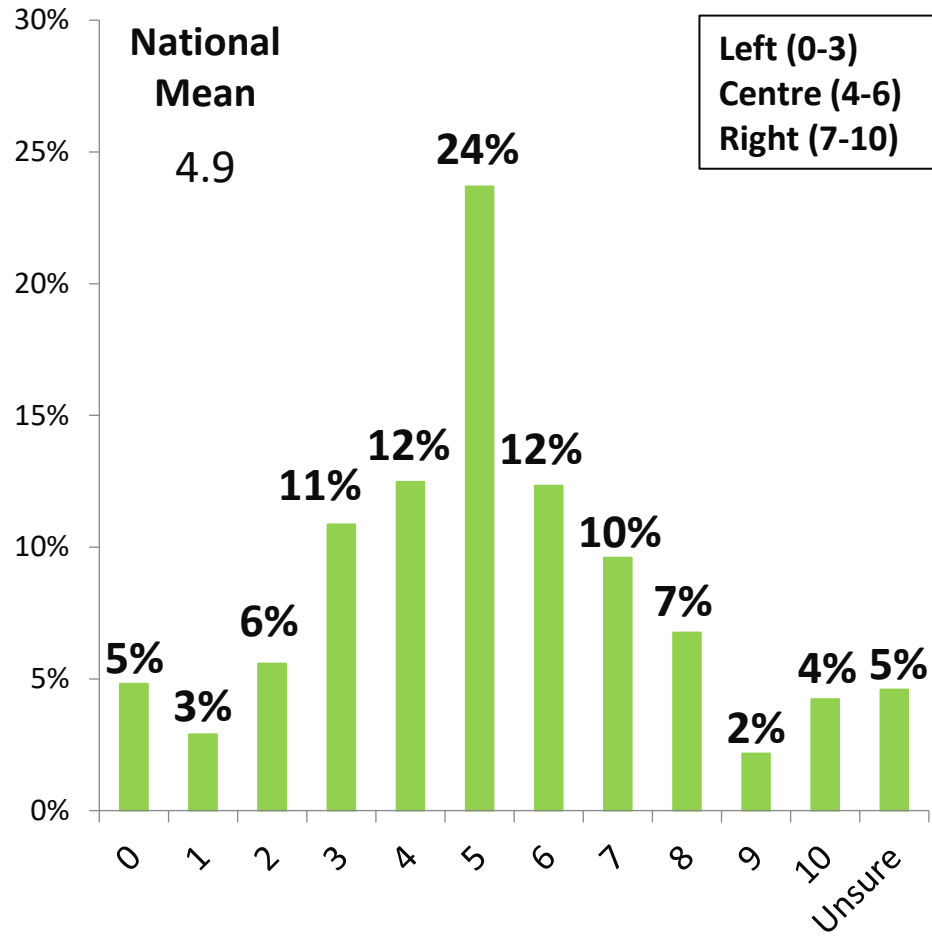
Mean	Atlantic (n=80)	Quebec (n=242)	Ontario (n=377)	Prairies (n=215)	BC (n=163)
	4.7	4.6	5.0	5.6	4.5
	Men (n=577)	Women (n=500)	18 to 34 (n=186)	35 to 54 (n=399)	55 plus (n=492)
	5.3	4.6	4.4	5.2	5.1

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?

POSITIVE ENERGY   NANOS

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1077 Canadians, 18 years of age or older, between January 31st and February 3rd, 2025 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 1077 Canadians is ±3.0 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.

Full data tables with weighted and unweighted number of interviews is here

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

METHODOLOGY

Element	Description
Research sponsor	Positive Energy at the University of Ottawa
Population and Final Sample Size	1077 Randomly selected individuals.
Source of Sample	Nanos Probability Panel
Type of Sample	Probability
Margin of Error	±3.0 percentage points, 19 times out of 20.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.
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.
Fieldwork/Validation	Live CATI interviews with live supervision to validate work.
Number of Calls	Maximum of five call backs.
Time of Calls	Individuals were called between 6:30-9:30pm local time for the respondent.
Field Dates	January 31st to February 3rd, 2025 .
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 land or cell lines, and 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. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Estimated Response Rate	15 per cent, consistent with industry norms.
Question Order	Question order in the tabulations appended to this report reflects the order in which they appeared in the original questionnaire.
Question Content	Topics on the omnibus ahead of the survey content included: Views on political issues, views on economic issues, defense spending, foreign relations with the United States, views on Canadian institutions, views on technology and automation at Canadian ports, views on lobbying and experiences with sports betting.
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 By political leaning

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

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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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