

Agreement that Canada should expand oil and gas exports to strengthen global energy security highest since tracking began; environmental concerns, conflicting interests and misinformation are perceived to be the biggest challenges to getting projects built.



The research gauged the opinions among Canadians on how important oil and gas are to Canada's current and future economy. It also assessed views about expanding oil and gas exports for a more secure global energy supply and to help combat global climate change. In addition, the survey asked Canadians to score government performance on energy decision-making. Questions were also asked about national energy projects, specifically, who should have the final say in approving them, what the main obstacles are and the level of support needed for the federal government to approve projects.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,034 Canadians, 18 years of age or older, from July 31st to August 6th, 2025, as part of an omnibus survey.

The margin of error for a random survey of 1,034 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

MAJORITY OF CANADIANS AGREE THAT OIL AND GAS IS IMPORTANT TO CANADA'S CURRENT AND FUTURE ECONOMY

More than four in five Canadians rate oil and gas as important to Canada's current economy (score of 7-10 out of 10) ([84%](#)) which is a marginal decrease from the previous wave in February 2025 ([88%](#)). Two in three Canadians also view oil and gas as important to Canada's future economy (score of 7 to 10 out of 10) ([67%](#)), which is consistent with the previous wave in February 2025 (70%).

2

MORE THAN SEVEN IN TEN CANADIANS AGREE OR SOMEWHAT AGREE ON EXPANDING OIL AND GAS EXPORTS FOR GLOBAL SECURITY, THE HIGHEST SINCE TRACKING BEGAN

The percentage of Canadians that agree or somewhat agree that Canada should expand oil and gas exports to help the world have more secure and reliable energy supplies jumped ten percentage points since August 2024 last summer ([44% agree and 28% somewhat agree; 35% agree, 26% somewhat agree in August 2024](#)) and is the highest since tracking began in 2022. Canadians are also more likely to agree than disagree 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 ([36% agree and 32% somewhat agree](#)). This is consistent with previous waves.

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

Canadians are more likely to say that Canada is doing a poor job than a good job at building public confidence in energy decision-making ([21% very poor and 29% poor; 11% good and less than one per cent very good](#)) and in developing a shared long-term vision for Canada's energy future ([29% very poor and 21% poor; 12% good and 2% very good](#)), which is consistent with previous waves.

4

CANADIANS SAY TOP CHALLENGES TO APPROVING ENERGY PROJECTS ARE ENVIRONMENTAL CONCERNS, CONFLICTING INTERESTS AND MISINFORMATION

When asked what is the number one challenge in developing energy projects in a manner that Canadians can have confidence in, the top three responses are environmental concerns and ensuring sustainability ([17%; compared to 19% in 2015](#)), balancing conflicting stakeholder interests ([16%; up from 9% in 2015](#)) and misinformation ([15%, down from 20% in 2015](#)).

5

CANADIANS SPLIT OVER WHETHER THE FEDERAL CABINET OR AN INDEPENDENT REGULATORY BODY SHOULD HAVE THE FINAL DECISION IN MAJOR ENERGY PROJECTS

About three in ten Canadians believe that the federal cabinet should have the final say over energy projects ([30%](#)), and another one in three think that an independent federal regulatory agency should ([29%](#)). When asked why they think this, the top reasons given are that the federal government is elected to represent Canadians ([15%](#)) and that an independent regulatory agency would be non-political ([14%](#)). Responses have changed since the question was last asked in 2018, when [25 per cent](#) opted for the federal cabinet and [36 per cent](#) for an independent regulator.

6

MAJORITY OF CANADIANS THINK THE FEDERAL GOVERNMENT SHOULD APPROVE A NATIONAL ENERGY PROJECT EVEN IF SOME AFFECTED PARTIES DON'T SUPPORT THE PROJECT

More than one in two Canadians think that the federal government should approve a major national energy project even if some local communities affected by the project don't support it ([61%](#)), some provinces affected by the project don't support it ([59%](#)), and some Indigenous nations affected by the project don't support it¹ ([57%](#)). Only one in three agree ([37%](#)) with the statement that the government should only approve major national energy projects when all parties support them.

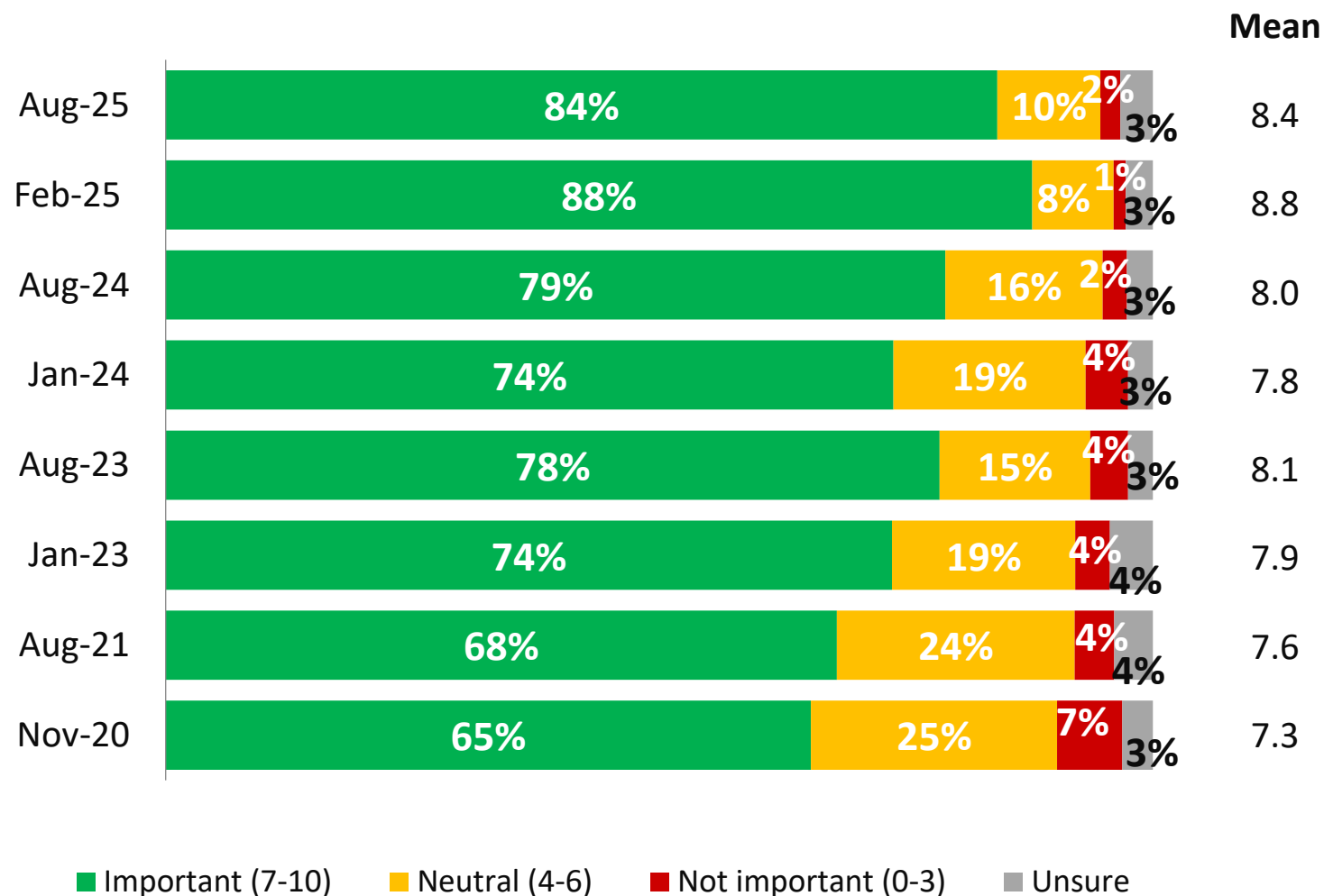
¹ The wording of this question does not mean that Indigenous rights can be ignored. Indigenous Peoples have constitutionally protected rights and Canada has committed to the United Nations Declaration on the Rights of Indigenous Peoples.

Current and future of oil and gas

Importance of oil and gas to Canada's current economy

As observed in previous waves, most Canadians say oil and gas is important to Canada's current economy, with over four in five saying so (84%). This number has risen substantially since 2020, but it is down slightly since February 2025.

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?



*Weighted to the true population proportion.

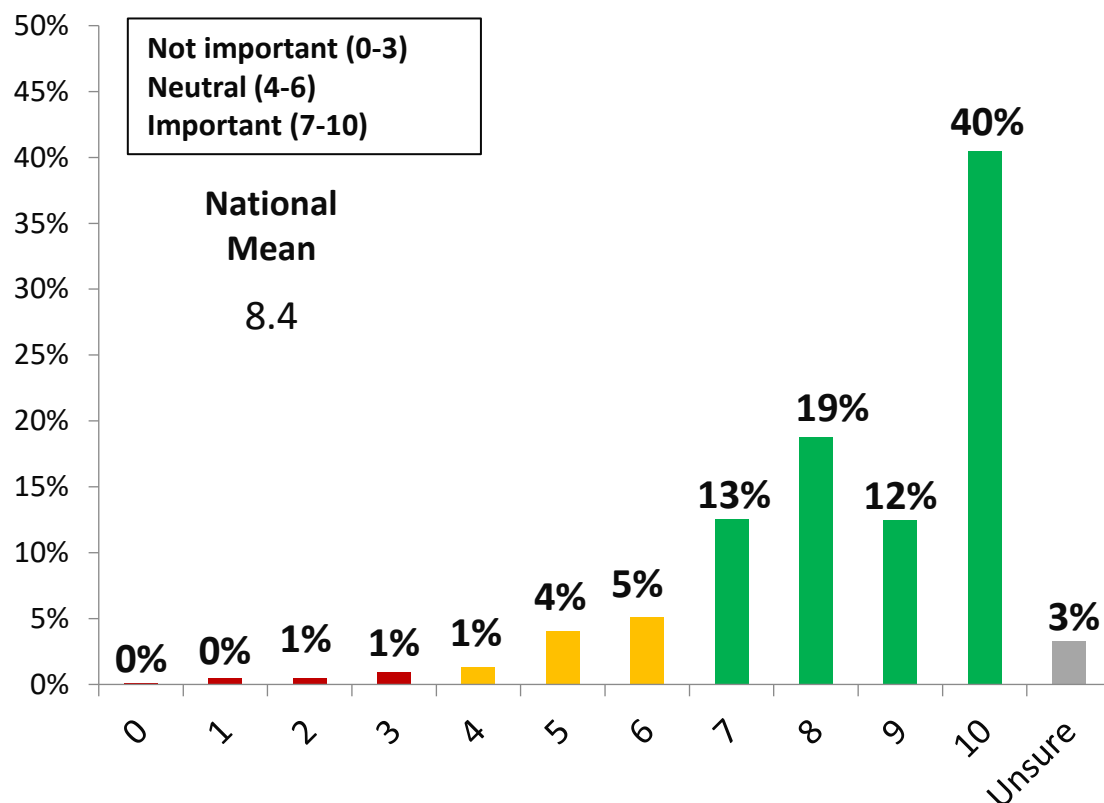
*Charts may not add up to 100 due to rounding.

*Labels under 3% have been removed for clarity.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Importance of oil and gas to Canada's current 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?



	Atlantic (n=95)	Quebec (n=208)	Ontario (n=337)	Prairies (n=228)	BC (n=166)
Mean	8.3	8.0	8.6	8.7	8.3
	Men (n=540)	Women (n=494)	18-34 (n=195)	35-54 (n=426)	55 plus (n=413)
Mean	8.5	8.4	8.2	8.5	8.6
	Usually votes LPC (n=358)	Usually votes CPC (n=301)	Usually votes NDP (n=116)	Left-leaning (n=259)	Right- leaning (n=239)
Mean	8.2	9.3	7.7	7.6	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, July 31st to August 6th, 2025, n=1034, 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)		
	2025-08 (n=826)	2025-02 (n=766)	2024-08 (n=873)	2025-08 (n=707)	2025-02 (n=683)	2024-08 (n=702)	2025-08 (n=84)	2025-02 (n=64)	2024-08 (n=133)	2025-08* (n=19)	2025-02 (n=9)*	2024-08* (n=21)
TOP RESPONSES	Contributes/tied to Canadian/provincial economy, exports, jobs	26.5%	38.5%	28.2%	29.0%	41.6%	31.1%	13.4%	15.2%	19.1%		
	Oil and gas are important Canadian natural resources/we have a lot of it/produce it	14.4%	9.2%	12.6%	16.4%	10.2%	15.3%	1.9%	2.0%	2.5%		
	We are still reliant/dependent on it	12.0%	3.0%	8.7%	13.6%	3.3%	10.0%	3.8%	1.3%	3.8%		
	Should be exploited more/exporting more and importing less/energy independence	7.2%	9.7%	7.5%	8.0%	10.3%	9.2%	2.4%	5.1%	0.6%		
	Important for Alberta/west in particular	6.4%	4.5%	5.6%	6.0%	4.3%	4.6%	9.9%	6.6%	10.9%		
	Needed for our lifestyle and the cold weather (vehicle and transportation, heating etc.)	6.1%	3.2%	6.1%	6.7%	3.7%	7.4%	2.9%	-	1.5%		
	Need to look into more sustainable, renewable and greener options (solar, wind, tidal etc.)	4.8%	5.4%	7.5%	1.3%	3.5%	3.5%	29.4%	20.5%	24.5%		
	We do not have/have not yet developed a reliable alternative/the transition to renewables is too slow	4.7%	3.8%	6.6%	5.2%	3.1%	8.2%	2.0%	11.1%	0.6%		
	From what I heard/experience/research	3.5%	1.5%	4.1%	3.7%	1.6%	3.7%	3.9%	-	5.8%		
	Oil and gas is no longer/not as relevant to the country/our economy	2.4%	1.8%	2.2%	1.6%	1.0%	0.3%	6.8%	10.1%	10.0%		
	It is bad for the environment	1.7%	1.7%	2.3%	0.2%	0.9%	0.7%	9.7%	6.5%	8.5%		
	Because of government policies/subsidies	1.5%	1.0%	1.8%	0.7%	1.2%	1.1%	6.9%	-	6.0%		
	Importance of oil and gas will be reduced but the transition to other energy sources will not be in near future	1.4%	2.7%	1.8%	1.5%	2.2%	1.5%	1.4%	8.1%	2.4%		
	Neutral/do not know enough	1.4%	1.4%	1.3%	0.4%	0.3%	0.5%	-	4.8%	-		
	Other	3.3%	1.8%	0.5%	3.2%	1.8%	0.6%	3.6%	1.4%	-		
	Unsure	1.5%	0.6%	0.9%	0.9%	0.3%	0.3%	-	3.3%	-		

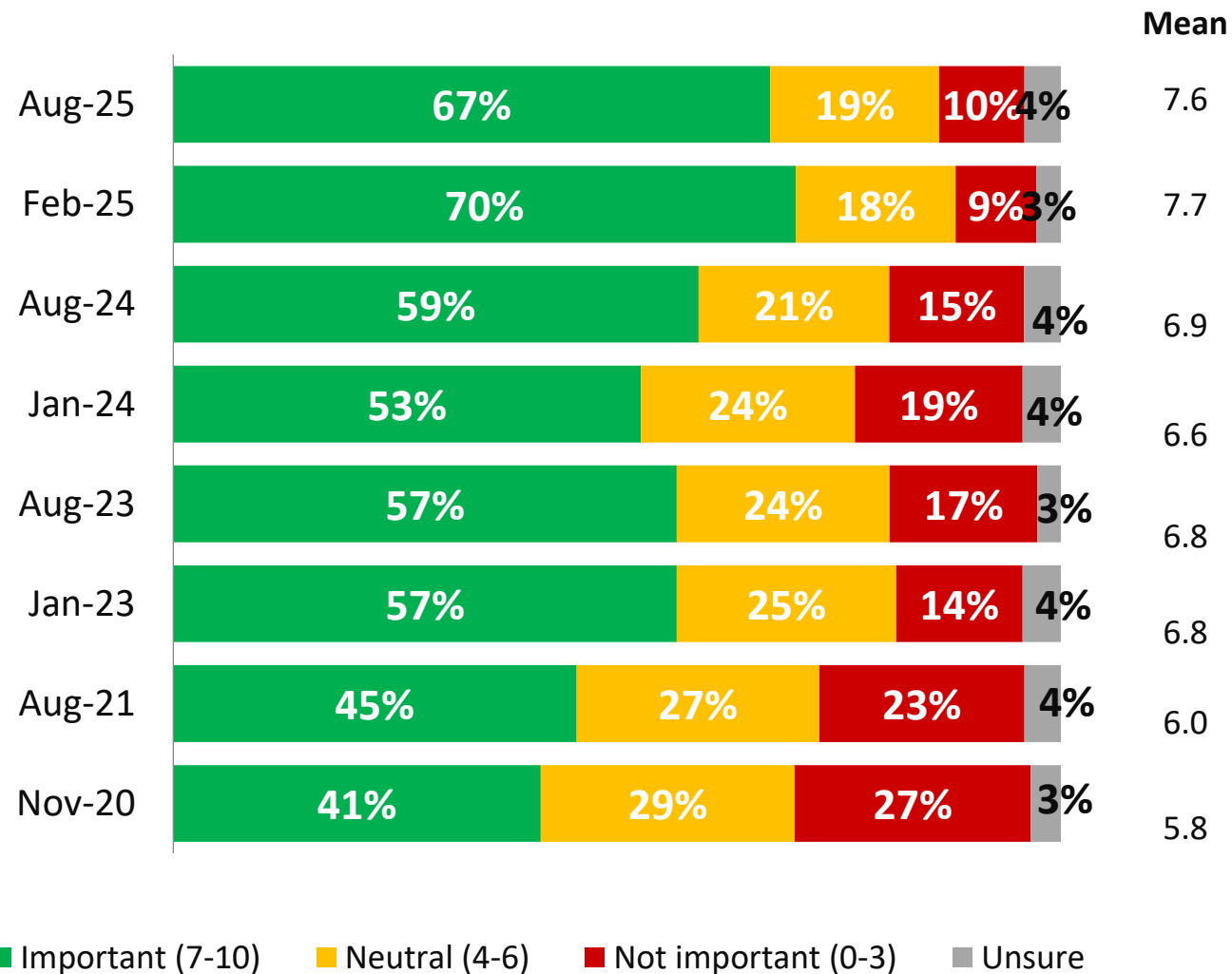
*Shaded due to small sample size

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=826, accurate 3.4 percentage points plus or minus, 19 times out of 20.

Importance of oil and gas to Canada's future economy

More than two in three Canadians (67%) say oil and gas is important to Canada's future economy. This number has risen since 2020 and is consistent with the previous wave.

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?



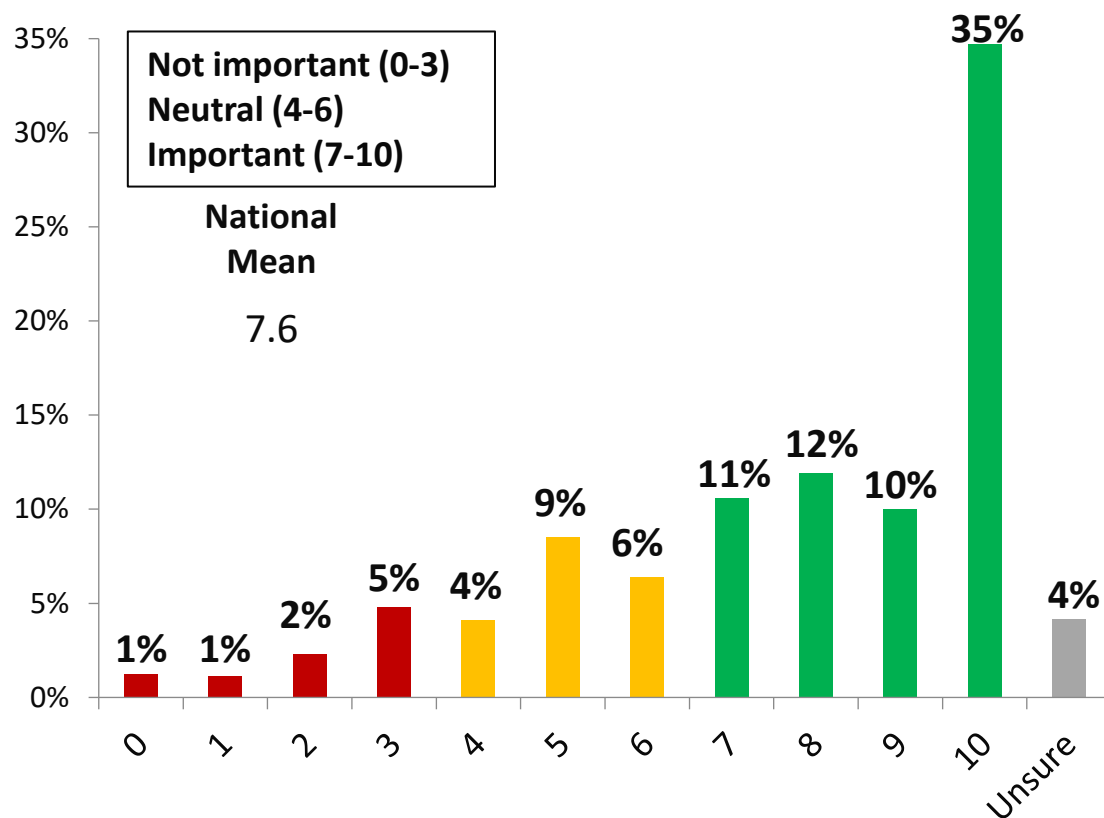
*Weighted to the true population proportion.

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

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Importance of oil and gas to Canada's future 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?



	Atlantic (n=95)	Quebec (n=208)	Ontario (n=337)	Prairies (n=228)	BC (n=166)
Mean	7.2	6.9	7.9	8.0	7.4
	Men (n=540)	Women (n=494)	18-34 (n=195)	35-54 (n=426)	55 plus (n=413)
Mean	7.6	7.5	7.1	7.7	7.7
	Usually votes LPC (n=358)	Usually votes CPC (n=301)	Usually votes NDP (n=116)	Left-leaning (n=259)	Right- leaning (n=239)
Mean	7.1	9.2	6.0	5.8	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 31st to August 6th, 2025, n=1034, 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]		Total			Important (7-10)			Neutral (4-6)			Not Important (0-3)		
		2025-08 (n=819)	2025-02 (n=759)	2024-08 (n=849)	2025-08 (n=558)	2025-02 (n=529)	2024-08 (n=508)	2025-08 (n=154)	2025-02 (n=145)	2024-08 (n=194)	2025-08 (n=81)	2025-02 (n=73)	2024-08 (n=123)
TOP RESPONSES	Moving towards clean energy/reducing reliance on fossil fuels	20.6%	19.4%	31.0%	8.0%	8.1%	9.7%	48.5%	49.4%	64.5%	55.6%	38.5%	65.8%
	Remains a large part of Canada's economy/still contributing to Canada's economy	17.2%	20.1%	20.2%	24.3%	29.5%	33.1%	2.1%	0.6%	2.9%	3.0%	-	0.5%
	Oil and gas remains the main energy source/key resource in Canada/nothing can/will replace oil and gas	15.2%	12.6%	16.9%	22.2%	17.8%	24.5%	1.1%	0.6%	8.3%	-	3.8%	4.1%
	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	14.0%	16.1%	10.6%	17.1%	22.4%	14.9%	12.0%	3.4%	6.6%	1.5%	-	0.6%
	Need to shift energy sources to control climate change	6.4%	8.9%	5.5%	0.5%	1.5%	1.3%	17.7%	22.3%	8.3%	22.2%	32.9%	17.4%
	Renewable energy sources can help diversify the economy and energy supply	3.7%	4.7%	0.9%	2.5%	2.8%	1.2%	6.6%	9.3%	-	3.6%	8.9%	1.1%
	Self-sufficiency	3.1%	-	-	3.9%	-	-	0.5%	-	-	3.7%	-	-
	Oil and gas still needed for transportation	2.3%	1.5%	1.0%	3.3%	2.2%	1.4%	0.2%	-	0.7%	-	-	-
	International relations/demand	2.3%	-	-	2.5%	-	-	0.3%	-	-	1.0%	-	-
	Renewables will not work/Government scam	2.0%	0.5%	2.7%	3.0%	0.6%	3.9%	-	0.5%	1.4%	-	-	-
	Our reserves will eventually be depleted	1.9%	2.2%	1.0%	0.9%	1.0%	0.7%	3.6%	5.7%	-	6.2%	2.5%	3.7%
	Canada produces cleaner fossil fuels than other countries, so we should continue to produce	1.8%	3.0%	0.9%	2.6%	4.4%	1.5%	-	-	-	-	-	-
	Products (plastics, petroleum products, manufacturing) will still be needed	1.7%	2.4%	2.2%	2.2%	2.8%	2.8%	1.1%	2.4%	2.5%	-	-	-
	Other	4.1%	2.6%	2.1%	4.2%	2.6%	3.1%	5.6%	0.7%	1.0%	1.5%	3.9%	0.6%
	Unsure	1.3%	0.3%	2.4%	0.8%	0.5%	1.1%	-	-	2.8%	-	-	-

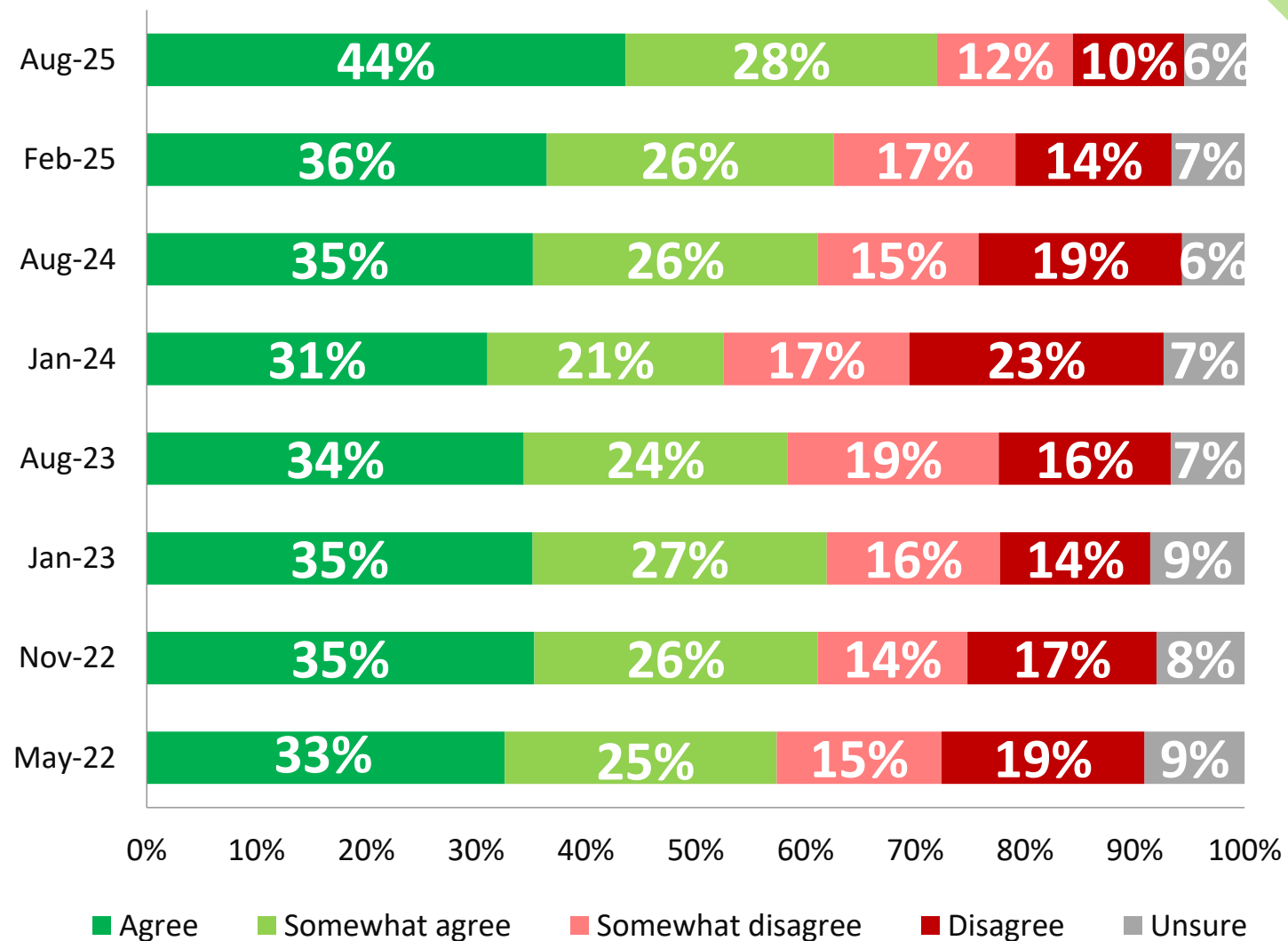
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=819, accurate 3.4 percentage points plus or minus, 19 times out of 20.

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

Over seven in ten Canadians agree (44%) or somewhat agree (28%) that Canada should expand oil and gas exports to help the world have more secure and reliable energy supplies. This is the highest since the benchmark wave in 2022 (33% agree; 25% somewhat agree).

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?



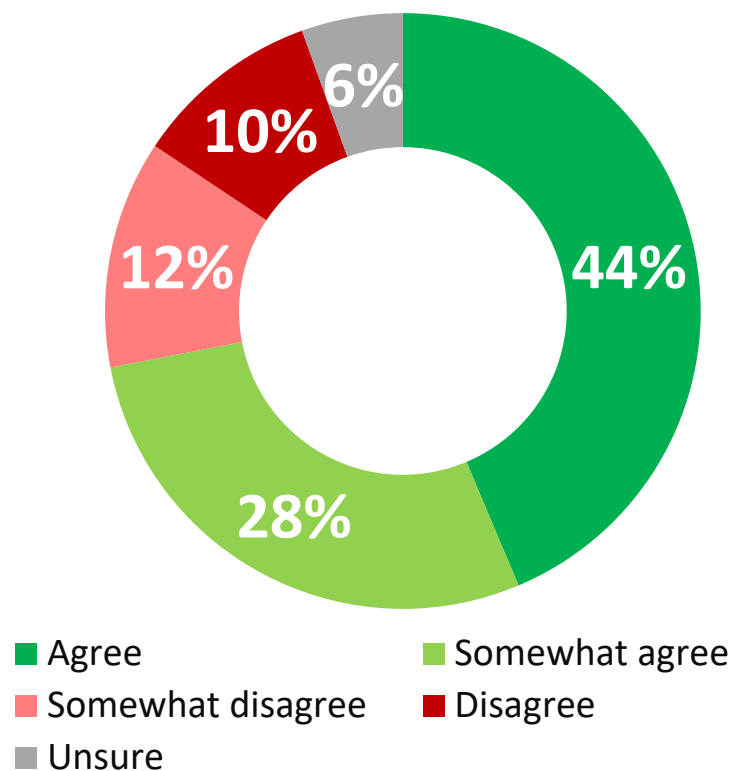
*Weighted to the true population proportion.

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

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, 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 – by demographics

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

Atlantic (n=95)	Quebec (n=208)	Ontario (n=337)	Prairies (n=228)	BC (n=166)
61.7%	64.6%	74.7%	80.7%	70.5%
Men (n=540)	Women (n=494)	18-34 (n=195)	35-54 (n=426)	55 plus (n=413)
76.8%	67.4%	61.6%	75.1%	76.3%
Usually votes LPC (n=358)	Usually votes CPC (n=301)	Usually votes NDP (n=116)	Left-leaning (n=259)	Right-leaning (n=239)
72.2%	90.4%	46.3%	49.0%	90.1%

*Weighted to the true population proportion.

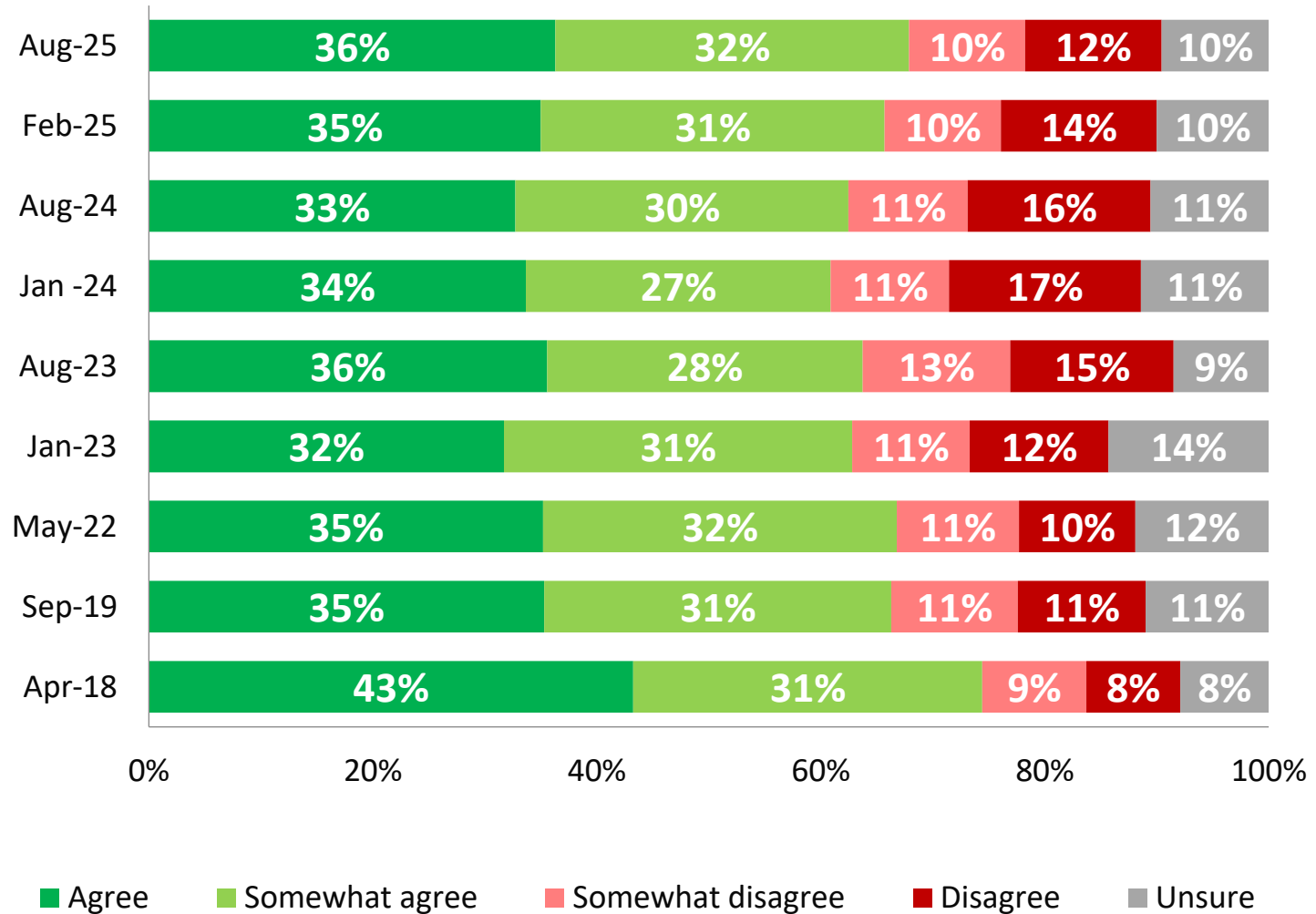
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

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

More than two in three Canadians

agree (36%) or somewhat agree (32%) 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. This is consistent with previous waves.



*Weighted to the true population proportion.

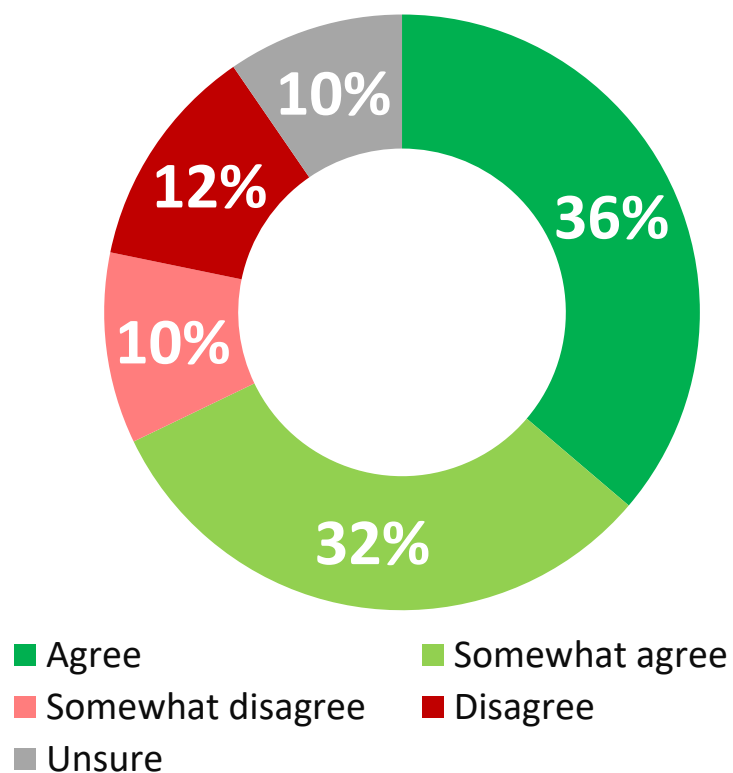
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Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

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 – by demographics

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.**



	Atlantic (n=95)	Quebec (n=208)	Ontario (n=337)	Prairies (n=228)	BC (n=166)
Agree/ Somewhat agree	63.5%	56.8%	73.3%	71.4%	68.8%
	Men (n=540)	Women (n=494)	18-34 (n=195)	35-54 (n=426)	55 plus (n=413)
	68.6%	67.2%	57.8%	71.0%	72.0%
	Usually votes LPC (n=358)	Usually votes CPC (n=301)	Usually votes NDP (n=116)	Left-leaning (n=259)	Right-leaning (n=239)
	70.3%	80.1%	50.0%	51.8%	79.9%

*Weighted to the true population proportion.

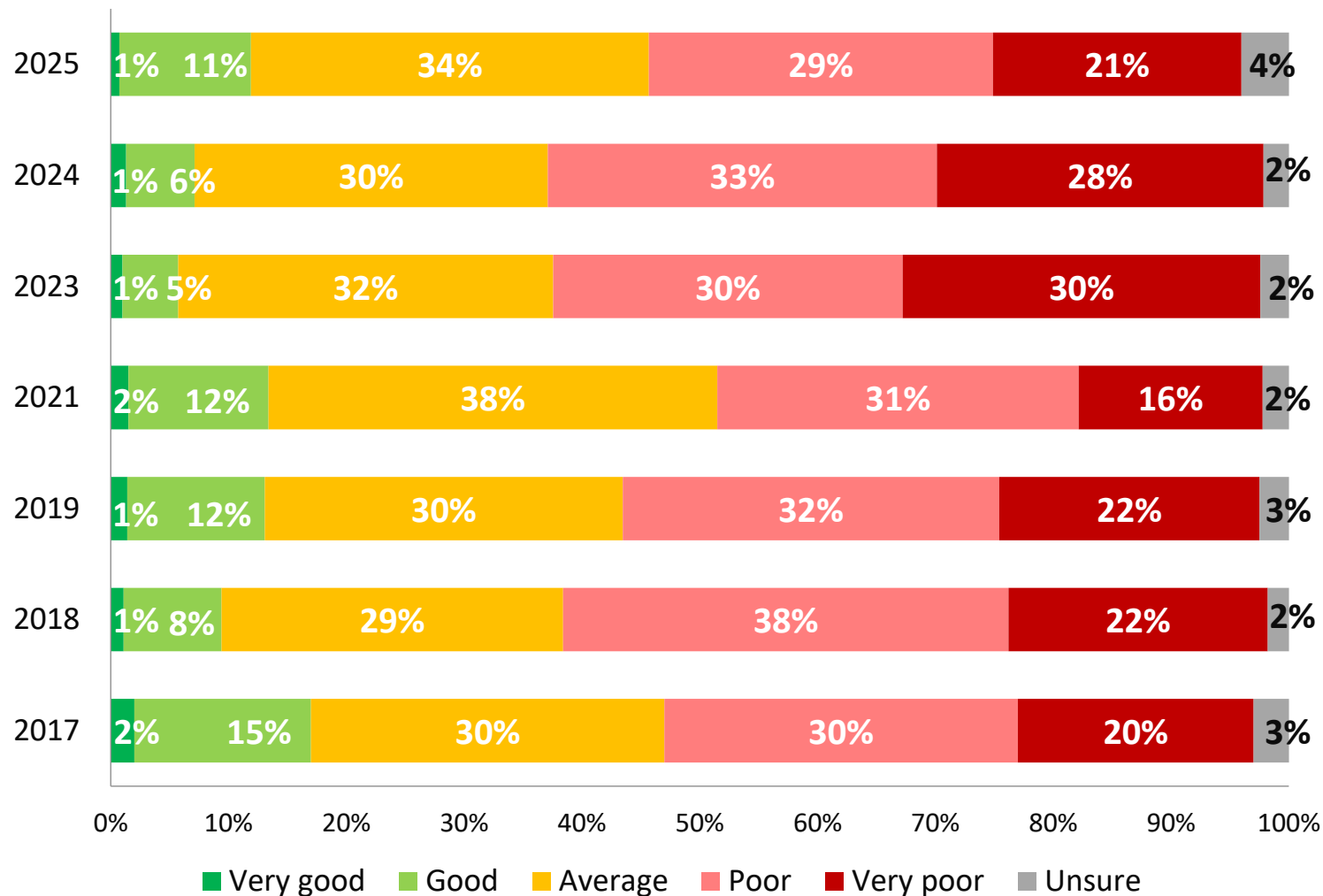
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Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Government performance on building public confidence and shared vision

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

About one in ten say Canada is doing a very good (one percent) or good job (11%), and about one in three say it is doing an average job (34%). However, one in two say it is doing a very poor (21%) or poor job (29%), a decrease since 2023.



*Weighted to the true population proportion.

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

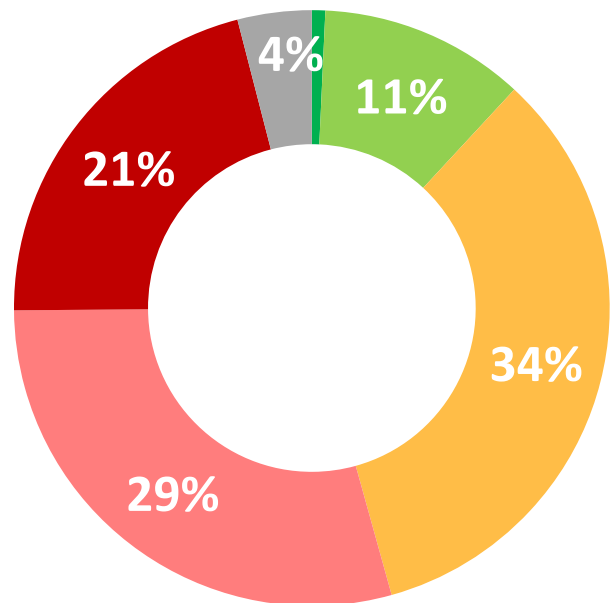
Q - Does Canada do a very good, good, average, poor or very poor job at the following?

Building public confidence in energy decision-making

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

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

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.

Very good/ good	Atlantic (n=95)	Quebec (n=208)	Ontario (n=337)	Prairies (n=228)	BC (n=166)
	10.9%	16.9%	11.9%	8.2%	8.8%
	Men (n=540)	Women (n=494)	18-34 (n=195)	35-54 (n=426)	55 plus (n=413)
Very poor/ poor	10.4%	13.4%	10.7%	12.4%	12.3%
	Usually votes LPC (n=358)	Usually votes CPC (n=301)	Usually votes NDP (n=116)	Left-leaning (n=259)	Right-leaning (n=239)
	17.9%	7.1%	8.2%	11.9%	5.9%
Very poor/ poor	Atlantic (n=95)	Quebec (n=208)	Ontario (n=337)	Prairies (n=228)	BC (n=166)
	45.9%	36.7%	52.0%	61.7%	56.0%
	Men (n=540)	Women (n=494)	18-34 (n=195)	35-54 (n=426)	55 plus (n=413)
Very poor/ poor	54.1%	46.6%	57.2%	51.5%	44.9%
	Usually votes LPC (n=358)	Usually votes CPC (n=301)	Usually votes NDP (n=116)	Left-leaning (n=259)	Right-leaning (n=239)
	29.4%	70.9%	51.3%	42.9%	69.4%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

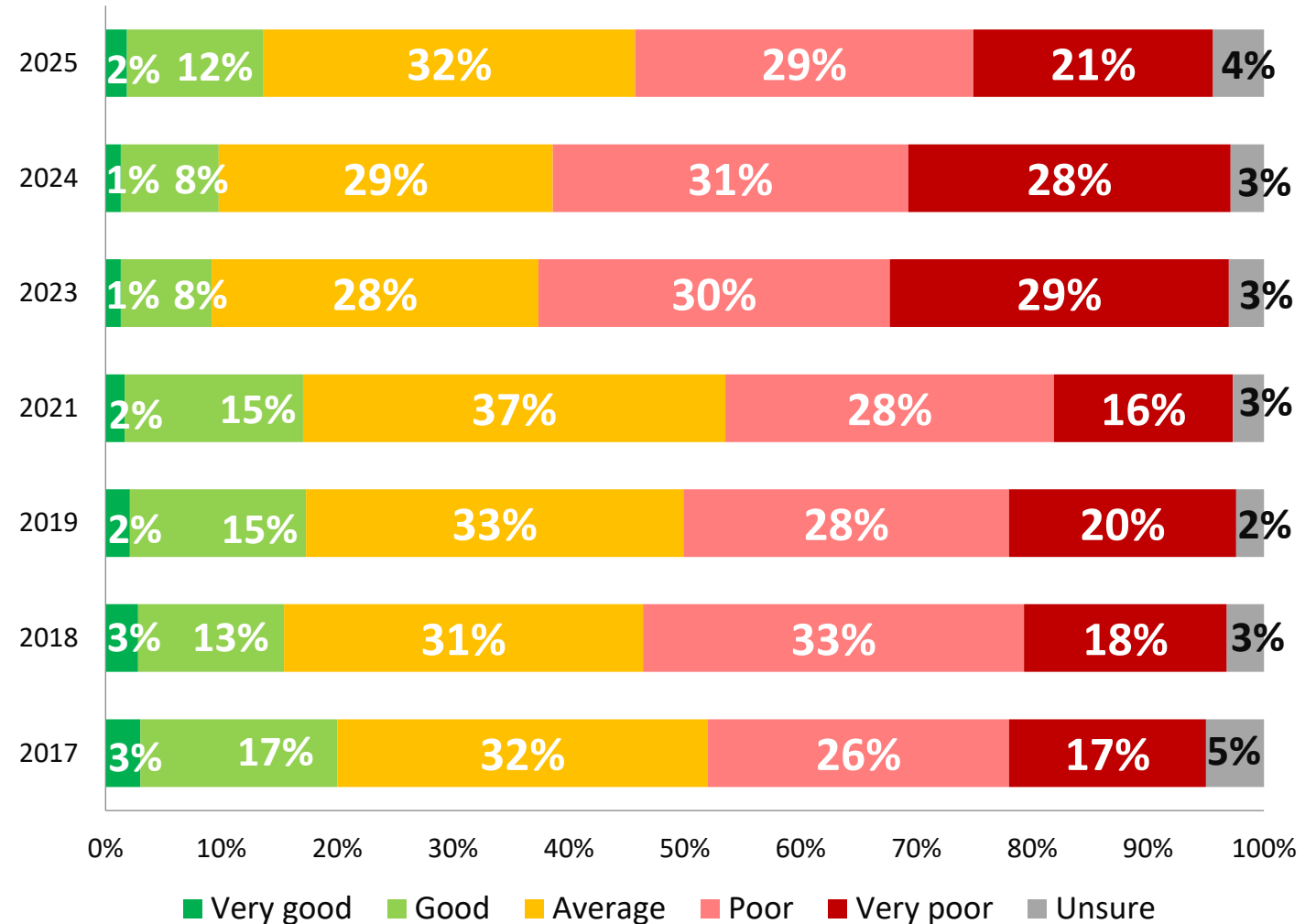
Job done by Canada at developing a long-term vision for Canada's energy future

Canadians are over three times more likely to say that Canada is doing a poor (29%) or very poor job (21%) at developing a shared long-term vision for Canada's energy future than a good (12%) or very good job (two percent).

This is an improvement over 2024 and 2023 (when Canadians were six times as likely to score Canada poorly), but it is still a lower performance score than when tracking began in 2017.

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



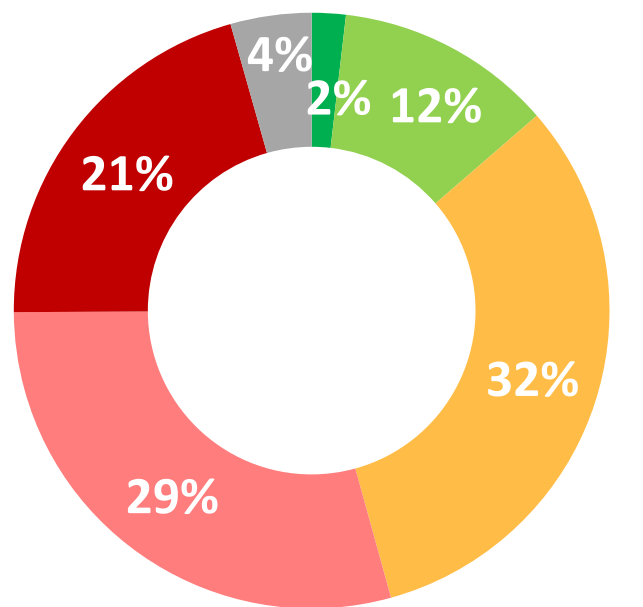
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Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

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

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.

Very good/ good	Atlantic (n=95)	Quebec (n=208)	Ontario (n=337)	Prairies (n=228)	BC (n=166)
	14.4%	19.7%	13.4%	10.1%	8.4%
	Men (n=540)	Women (n=494)	18-34 (n=195)	35-54 (n=426)	55 plus (n=413)
Very poor/ poor	12.1%	15.2%	8.8%	13.9%	16.6%
	Usually votes LPC (n=358)	Usually votes CPC (n=301)	Usually votes NDP (n=116)	Left-leaning (n=259)	Right-leaning (n=239)
	21.9%	7.0%	4.9%	13.1%	6.6%
Very poor/ poor	Atlantic (n=95)	Quebec (n=208)	Ontario (n=337)	Prairies (n=228)	BC (n=166)
	51.8%	38.6%	50.5%	62.4%	50.2%
	Men (n=540)	Women (n=494)	18-34 (n=195)	35-54 (n=426)	55 plus (n=413)
Very poor/ poor	54.4%	45.5%	57.2%	50.1%	45.0%
	Usually votes LPC (n=358)	Usually votes CPC (n=301)	Usually votes NDP (n=116)	Left-leaning (n=259)	Right-leaning (n=239)
	28.9%	70.4%	52.2%	45.1%	68.8%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Approving national energy projects

Challenges to developing energy projects

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

	2025-08 (n=853)	2015-10 (n=112)
Environmental concerns and ensuring sustainability	16.5%	18.8%
Balancing conflicting stakeholder interests	16.0%	8.9%
Misinformation and lack of knowledge/understanding of energy needs and impacts	14.9%	19.6%
Obtaining social licence/buy in from advocacy groups, native and local communities	10.3%	8.0%
Lack of transparency/lack of clear process	6.6%	8.9%
Lack of national energy strategy	4.9%	8.9%
A lack of trust in institutions and key regulatory processes	4.7%	11.6%
Federal government-related involvement/red tape/roadblocks/lack of action	4.2%	-
Politics/ideology	4.2%	-
Cost/funding of project and cost transfer consumer	4.0%	7.1%

TOP RESPONSES

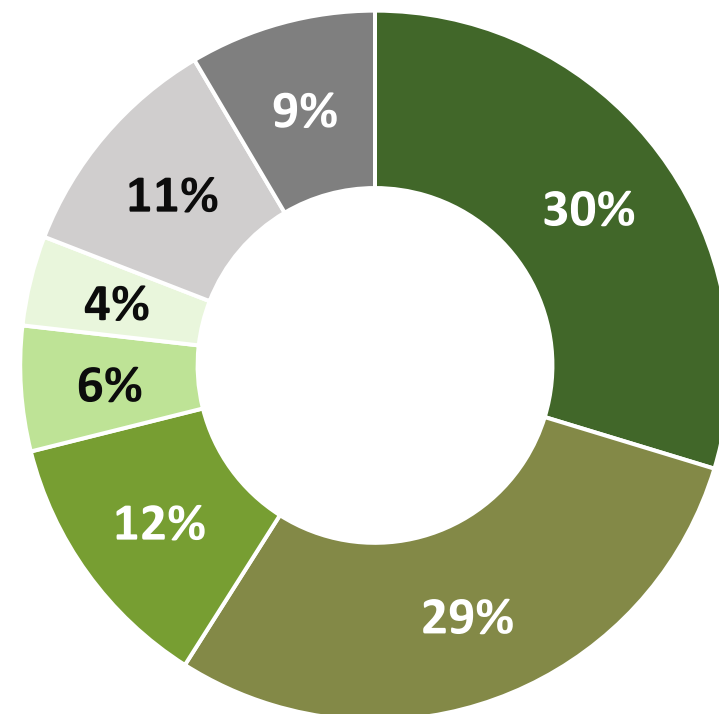
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=853, accurate 3.4 percentage points plus or minus, 19 times out of 20.

Opinions on who should have final decision-making power

Three in ten Canadians think that the federal cabinet should have the final decision-making power in terms of national energy projects (30%), and just under another three in ten think that power should instead go to an independent regulatory agency (29%).

This marks a shift from the previous wave in 2018, where Canadians favoured an independent agency (36%) over the federal cabinet (25%).

Q – When it comes to major national energy projects, who should have the final decision-making power?
[Randomize] (Select one)



- The federal cabinet
- An independent regulatory agency
- Provincial governments
- Indigenous governments whose land is affected by the project
- Local or municipal governments
- Other
- Unsure

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Opinions on who should have final decision-making power – by regions

Q – When it comes to major national energy projects, who should have the final decision-making power? [Randomize] (Select one)

	Canada		Atlantic		Quebec		Ontario		Prairies		BC	
	2025-08 (n=1034)	2018-04 (n=1000)	2025-08 (n=95)	2018-04 (n=100)	2025-08 (n=208)	2018-04 (n=250)	2025-08 (n=337)	2018-04 (n=300)	2025-08 (n=228)	2018-04 (n=200)	2025-08 (n=166)	2018-04 (n=150)
The federal cabinet	29.7%	24.8%	22.8%	28.9%	25.1%	16.6%	37.7%	27.0%	22.8%	28.7%	27.2%	26.0%
An independent regulatory agency	29.3%	36.3%	20.5%	34.2%	36.6%	33.7%	24.0%	37.9%	30.4%	41.5%	34.6%	31.4%
Provincial governments	12.1%	11.6%	16.7%	7.1%	12.9%	23.5%	7.3%	4.9%	21.6%	8.1%	10.2%	12.7%
Indigenous governments whose land is affected by projects	5.7%	6.8%	8.4%	11.3%	5.5%	5.4%	6.4%	8.5%	1.6%	4.8%	7.9%	5.4%
Local or municipal governments affected by projects	4.1%	7.6%	3.5%	6.1%	4.5%	11.1%	4.5%	7.8%	3.5%	3.8%	3.3%	7.5%
Other	10.6%	9.8%	15.1%	8.3%	9.2%	6.2%	11.4%	12.4%	8.8%	8.7%	10.8%	12.8%
Unsure	8.5%	3.2%	13.0%	4.2%	6.2%	3.5%	8.7%	1.4%	11.2%	4.3%	6.0%	4.2%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Opinions on who should have final decision-making power – by gender and age

Q – When it comes to major national energy projects, who should have the final decision-making power? [Randomize] (Select one)

	Canada		Men		Women		18-34		35-54		55 plus	
	2025-08 (n=1034)	2018-04 (n=1000)	2025-08 (n=540)	2018-04 (n=518)	2025-08 (n=494)	2018-04 (n=482)	2025-08 (n=195)	2018-04 (n=185)	2025-08 (n=426)	2018-04 (n=396)	2025-08 (n=413)	2018-04 (n=419)
The federal cabinet	29.7%	24.8%	35.2%	32.0%	24.5%	17.9%	29.1%	22.4%	29.9%	23.7%	30.0%	27.4%
An independent federal regulatory agency	29.3%	36.3%	28.1%	34.5%	30.4%	38.0%	24.8%	32.4%	29.1%	37.1%	32.3%	38.2%
Provincial governments	12.1%	11.6%	13.1%	11.8%	11.2%	11.4%	14.1%	11.6%	12.0%	13.4%	10.9%	10.0%
Indigenous governments whose land is affected by projects	5.7%	6.8%	4.0%	4.2%	7.3%	9.3%	10.2%	10.9%	5.0%	6.4%	3.3%	4.3%
Local or municipal governments affected by projects	4.1%	7.6%	3.8%	5.4%	4.4%	9.7%	5.0%	12.0%	5.4%	6.9%	2.5%	5.2%
Other	10.6%	9.8%	9.6%	10.1%	11.6%	9.5%	7.2%	7.8%	11.3%	8.7%	12.3%	12.1%
Unsure	8.5%	3.2%	6.2%	2.0%	10.7%	4.4%	9.6%	2.9%	7.3%	3.8%	8.6%	2.9%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Reasons for opinions on who should have final decision-making power

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

The federal cabinet

An independent regulatory agency

Provincial governments

2025-08
(n=238)

2025-08
(n=227)

2025-08
(n=90)

TOP RESPONSES

Federal government is
elected to represent
Canadians

39.1%

Independent
regulatory agency
would be non-political

46.4%

Provincial autonomy

51.6%

National interest
priority

25.8%

Distrust in current
government

12.9%

Distrust in current
government

22.7%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=808, accurate 3.5 percentage points plus or minus, 19 times out of 20.

Reasons for opinions on who should have final decision-making power – Continued

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

Local or municipal governments affected by projects

Indigenous governments whose land is affected by projects

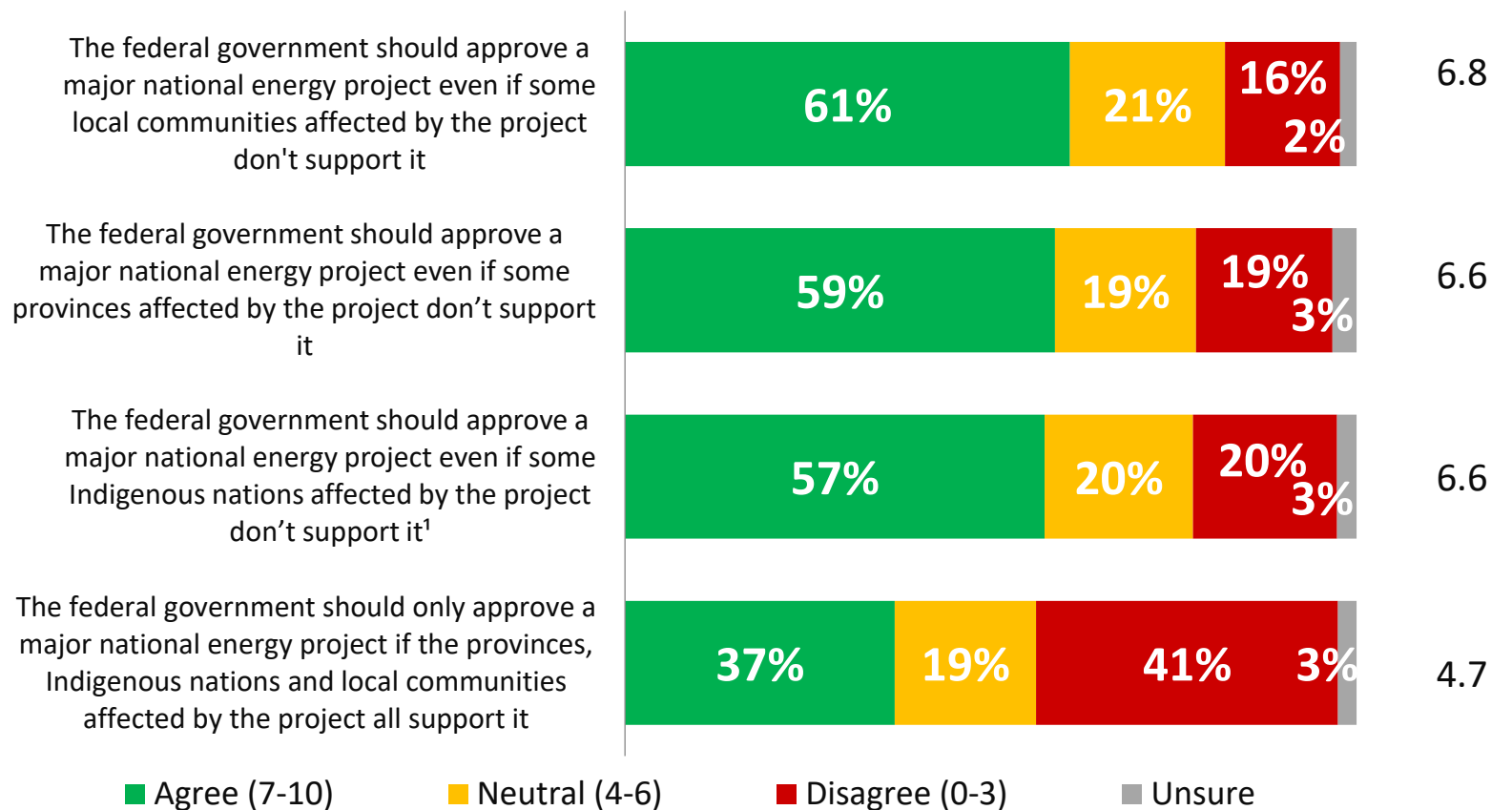
TOP RESPONSES

	2025-08 (n=32)		2025-08 (n=46)
Local community impact	64.9%	Indigenous rights and involvement	88.5%
Provincial autonomy	10.4%	Other	5.6%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=808, accurate 3.5 percentage points plus or minus, 19 times out of 20.

Over one in two Canadians agree that the federal government should approve major national energy projects even if some parties do not support them. Meanwhile, only about one in three agree (37%) with the statement that the federal government should only approve major national energy projects when all parties support them.

Level of support needed for federal approval of energy projects



¹ The wording of this question does not mean that Indigenous rights can be ignored. Indigenous Peoples have constitutionally protected rights and Canada has committed to the United Nations Declaration on the Rights of Indigenous Peoples.

*Weighted to the true population proportion.

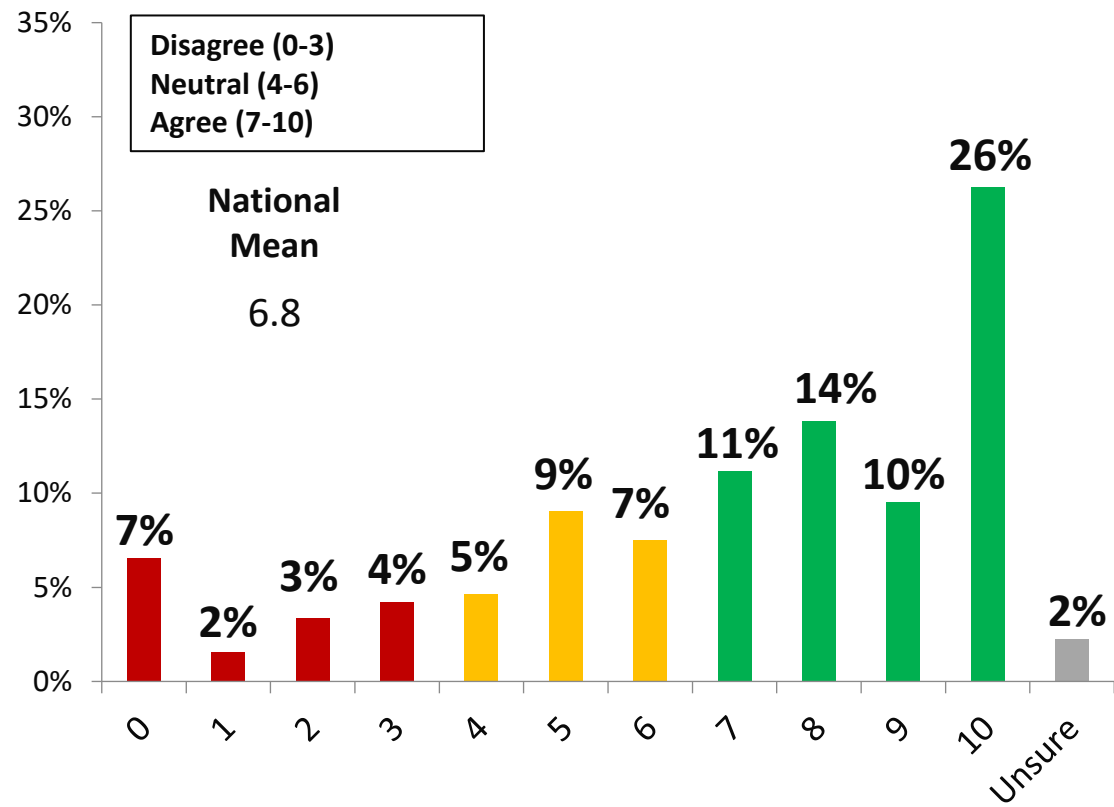
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Q – On a scale of 0 to 10, where 0 means you completely disagree and 10 means you completely agree, how much do you agree or disagree with each of the following statements [RANDOMIZE]:

Approving major national energy projects without the support of some affected local communities

Q – On a scale of 0 to 10, where 0 means you completely disagree and 10 means you completely agree, how much do you agree or disagree with each of the following statements? **The federal government should approve a major national energy project even if some local communities affected by the project don’t support it.**

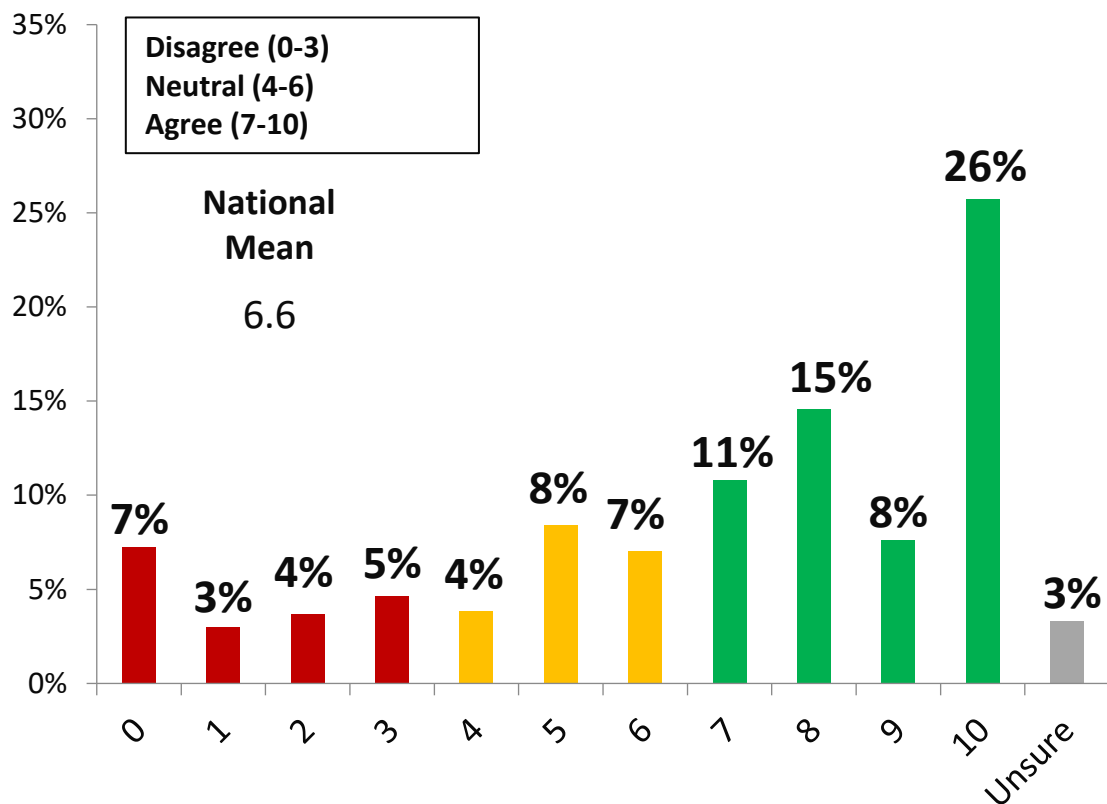


	Atlantic (n=95)	Quebec (n=208)	Ontario (n=337)	Prairies (n=228)	BC (n=166)
Mean	6.0	6.3	7.1	7.4	6.7
	Men (n=540)	Women (n=494)	18-34 (n=195)	35-54 (n=426)	55 plus (n=413)
Mean	7.2	6.5	6.3	6.9	7.1
	Usually votes LPC (n=358)	Usually votes CPC (n=301)	Usually votes NDP (n=116)	Left-leaning (n=259)	Right- leaning (n=239)
Mean	7.0	8.2	5.1	5.6	8.1

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

Approving major national energy projects without the support of some of the affected provinces

Q – On a scale of 0 to 10, where 0 means you completely disagree and 10 means you completely agree, how much do you agree or disagree with each of the following statements? **The federal government should approve a major national energy project even if some provinces affected by the project don't support it.**



	Atlantic (n=95)	Quebec (n=208)	Ontario (n=337)	Prairies (n=228)	BC (n=166)
Mean	6.1	5.6	7.1	7.2	6.7
	Men (n=540)	Women (n=494)	18-34 (n=195)	35-54 (n=426)	55 plus (n=413)
	7.1	6.2	6.2	6.8	6.8
	Usually votes LPC (n=358)	Usually votes CPC (n=301)	Usually votes NDP (n=116)	Left-leaning (n=259)	Right- leaning (n=239)
	6.9	7.9	5.2	5.6	7.7

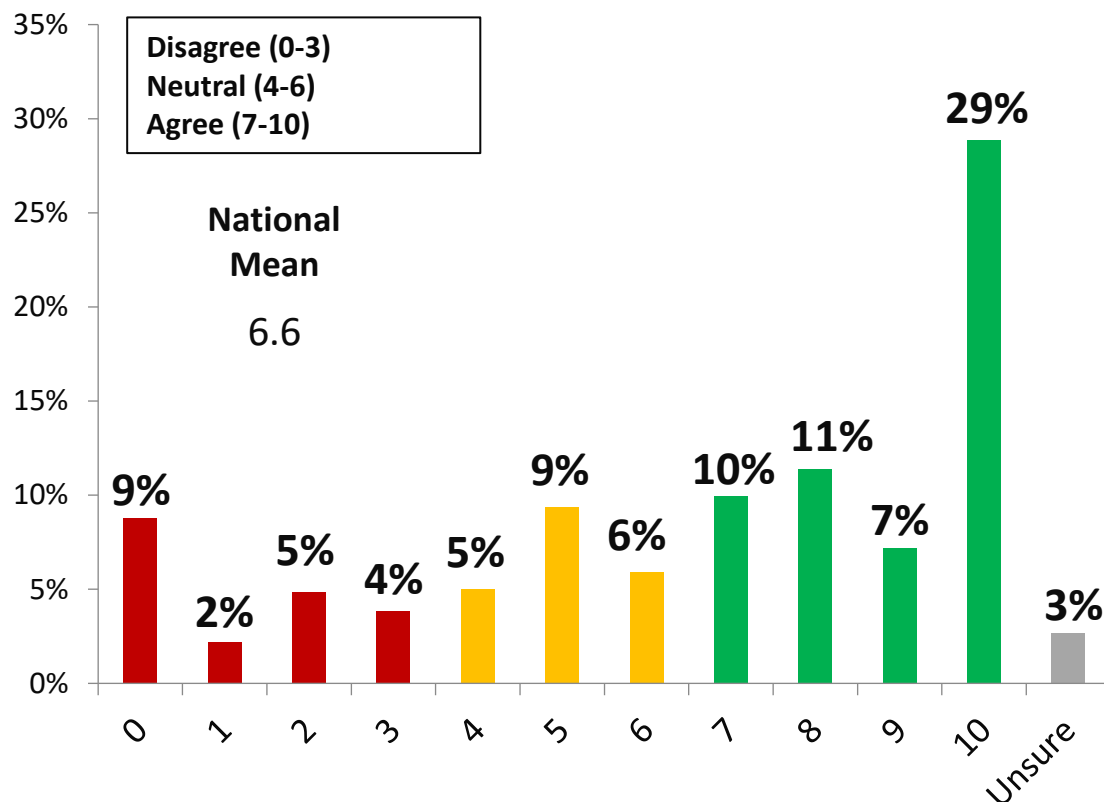
*Weighted to the true population proportion.

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

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Approving major national energy projects without the support of some Indigenous nations affected by it

Q – On a scale of 0 to 10, where 0 means you completely disagree and 10 means you completely agree, how much do you agree or disagree with each of the following statements? **The federal government should approve a major national energy project even if some Indigenous nations affected by the project don't support it¹**



	Atlantic (n=95)	Quebec (n=208)	Ontario (n=337)	Prairies (n=228)	BC (n=166)
Mean	6.1	5.7	6.8	7.3	6.6
	Men (n=540)	Women (n=494)	18-34 (n=195)	35-54 (n=426)	55 plus (n=413)
Mean	7.0	6.2	6.1	6.5	6.9
	Usually votes LPC (n=358)	Usually votes CPC (n=301)	Usually votes NDP (n=116)	Left-leaning (n=259)	Right- leaning (n=239)
Mean	6.5	8.3	4.5	4.9	8.1

*Weighted to the true population proportion.

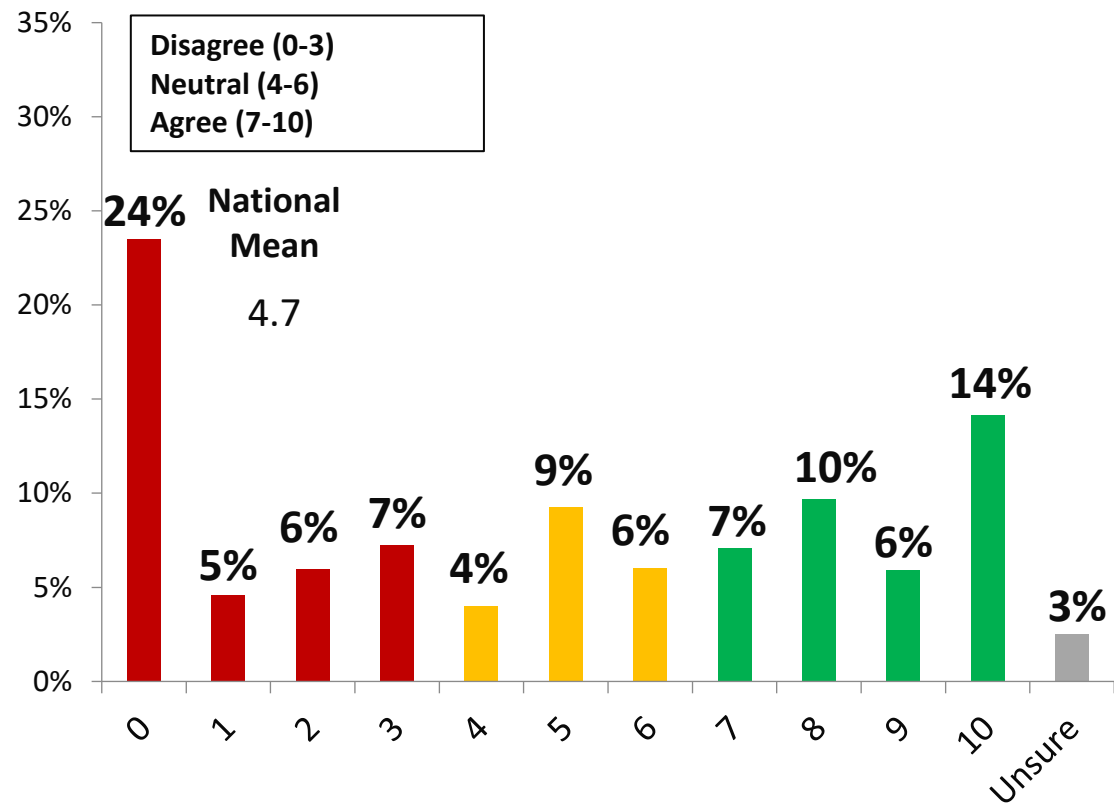
*Charts may not add up to 100 due to rounding.

¹ The wording of this question does not mean that Indigenous rights can be ignored. Indigenous Peoples have constitutionally protected rights and Canada has committed to the United Nations Declaration on the Rights of Indigenous Peoples.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1034, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Approving major national energy projects only with the support of affected provinces, Indigenous nations and local communities

Q – On a scale of 0 to 10, where 0 means you completely disagree and 10 means you completely agree, how much do you agree or disagree with each of the following statements? **The federal government should only approve a major national energy project if the provinces, Indigenous nations and local communities affected by the project all support it**



	Atlantic (n=95)	Quebec (n=208)	Ontario (n=337)	Prairies (n=228)	BC (n=166)
Mean	5.2	5.6	4.7	3.6	4.6
	Men (n=540)	Women (n=494)	18-34 (n=195)	35-54 (n=426)	55 plus (n=413)
Mean	4.0	5.4	4.5	4.8	4.8
	Usually votes LPC (n=358)	Usually votes CPC (n=301)	Usually votes NDP (n=116)	Left-leaning (n=259)	Right- leaning (n=239)
Mean	5.2	3.1	6.6	6.3	3.2

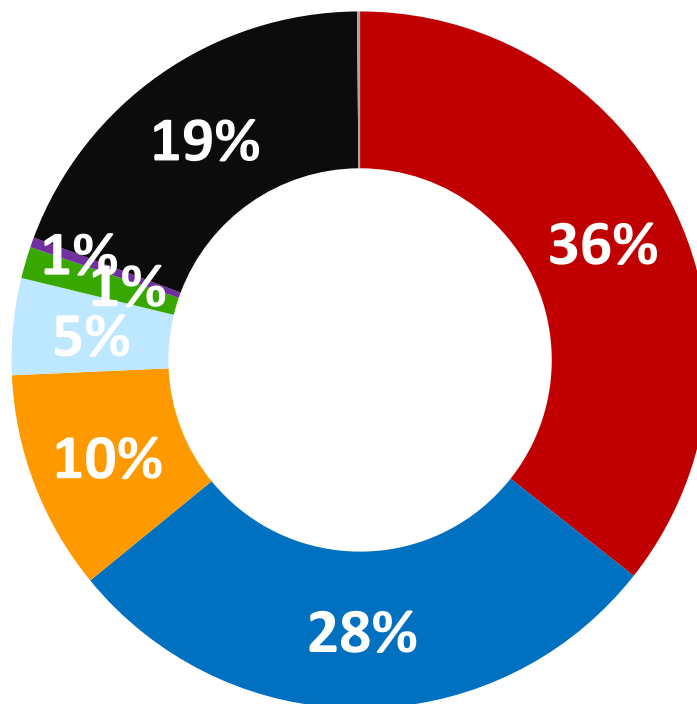
*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

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

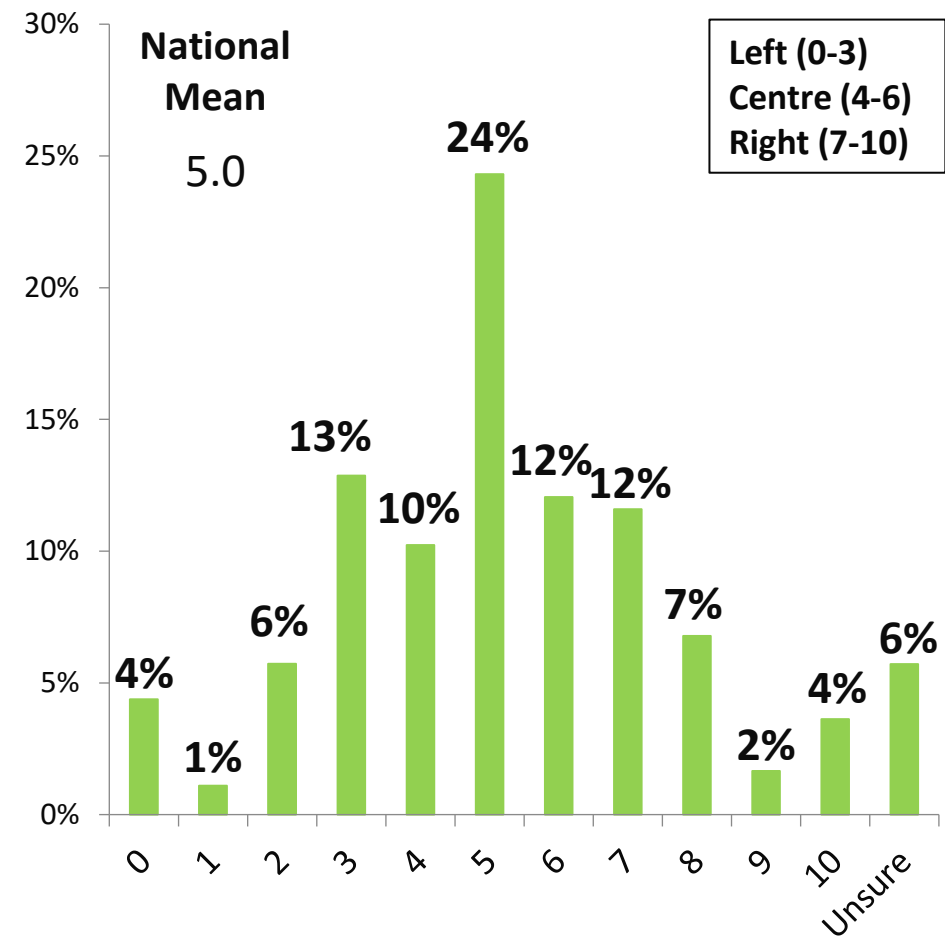
**Weighted to the true population proportion.

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

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 31st to August 6th, 2025, n=1033, 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=94)	Quebec (n=208)	Ontario (n=337)	Prairies (n=228)	BC (n=166)
Mean	4.4	4.9	5.2	5.3	4.7
	Men (n=540)	Women (n=493)	18 to 34 (n=195)	35 to 54 (n=425)	55 plus (n=413)
	5.3	4.8	4.7	5.0	5.2

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 31st to August 6th, 2025, n=1033, accurate 3.1 percentage points plus or minus, 19 times out of 20.

METHODOLOGY

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,034 Canadians, 18 years of age or older, between July 31st and August 6th, 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 1,034 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	1,034 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	10 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, US-Canada relations, defence, car purchases, the environment, asylum seekers crossing the Canada-US border, US-based financial investments for Canadian pension funds, travel, Tax credits and benefits, refugees, and the Bank of 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.	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	2025-2867 Positive Energy Tables – formatted 2025-2867 Positive Energy Tables by Party and Spectrum - formatted
Field Dates	July 31st and August 6th, 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/		



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Any questions?



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