

A background image showing a person's hands hugging a tree trunk in a forest. The text is overlaid on this image.

Canadians most likely to rank energy as sector with greatest potential to expand exports to non-US destinations; want to see Canada prioritize energy exports to Europe and Asia.

The research gauged the opinions among Canadians on climate ambition, energy affordability and whether the environment or the economy should be prioritized. It also delved into views on confidence and Canada's international positioning for emissions reductions. The survey also asked Canadians about energy infrastructure investments, which destinations Canada should prioritize for energy exports and their views on which sectors of the economy have the greatest potential to contribute to the country's objective of doubling exports to non-US destinations.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,045 Canadians, 18 years of age or older, between October 27th and 30th, 2025, as part of an omnibus survey.

The margin of error for a random survey of 1,055 Canadians is ± 3.0 percentage points, 19 times out of 20.

Full data tables with weighted and unweighted number of interviews are here:

[By region, age and gender](#)

[By vote and political spectrum](#)

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

KEY FINDINGS

1

CANADIANS ARE SPLIT ABOUT TIMING FOR ADDRESSING CLIMATE CHANGE

Nearly two in five Canadians ([39%](#)) believe it is the best time (score of 7-10 out of 10) for Canada to be ambitious in addressing climate change even if there are costs to the economy. This is consistent with the latest wave of tracking in May 2025 ([37%](#)). Over one in three say it is the worst time (score of 0-3 out of 10) ([35%](#); [36% in May 2025](#)). One in five Canadians also continue to rate this as absolutely the worst time to be ambitious (score of 0 out of 10) ([22%](#); [20% in May 2025](#)). When asked the reason for their views, those who think it is the best time (score 7-10 out of 10) most often said because we need to act now/climate change can't wait ([66%](#); [67% in May 2025](#)) while those who believe it is the worst time (score 0-3 out of 10) most often said so because there are other priorities/focus should be on health/basic needs (food, heat for winter, etc.) ([21%](#), [up from 18% in May 2025](#)).

2

LEVEL OF CONCERN OVER ENERGY PRICES IN THE NEXT SIX MONTHS INCREASES

Concern over energy prices in the next six months ([51% score of 7-10 out of 10](#)) has increased since the most recent wave in May 2025 ([45%](#)). One in four Canadians ([24%](#)) rate their level of concern a 10 out of 10. Residents of the Atlantic region are more likely to be concerned ([mean of 7.4 out of 10](#), compared to the [national mean of 6.3](#)) than residents of Quebec ([mean of 5.9 out of 10](#)), as were those who consider themselves right-leaning ([mean of 7.1 out of 10](#)) compared to those who consider themselves left-leaning ([mean of 5.4 out of 10](#)). When asked the reason for their views, those who say they are concerned most often said because of high cost/prices are increasing ([25%](#)); while those who say they are not concerned most often said I can afford it/not expensive/not concerned ([58%](#)).

3

CANADIANS SIGNIFICANTLY MORE LIKELY TO PRIORITIZE ECONOMIC GROWTH OVER THE ENVIRONMENT

Nearly three in five Canadians think growth and creating jobs should be the top priority, even if the environment suffers to some extent. This is an increase of more than ten percentage points since the previous wave ([57%](#), [compared to 44% in November 2024](#)). About one in three respondents say protecting the environment should be given priority, even if it causes slower economic growth and some loss of jobs ([35%](#), [compared to 46% in November 2024](#)). Those who usually vote for the Conservative Party of Canada ([88%](#)) are over four times more likely to prioritize growth and creating jobs than those who usually vote for the New Democratic Party of Canada ([19%](#)), and those who are left-leaning are over six times more likely to prioritize the environment ([69%](#)) than those who are right-leaning ([10%](#)).

4

CANADIANS HAVE MORE CONFIDENCE IN CITIZENS AND GOVERNMENTS THAN IN CORPORATIONS TO REDUCE EMISSIONS

Over one in four Canadians have high confidence (score of 7 to 10 out of 10) in citizens changing their behaviour ([27%](#); [marginally up from 22% in November 2024](#)) and governments creating policies ([26%](#); [24% in November 2024](#)) to help reduce greenhouse gas emissions. Meanwhile, more than half of respondents have low confidence (score of 0 to 3 out of 10) in corporations changing their behaviour to help reduce greenhouse gas emissions ([55%](#); [marginally up from 50% in November 2024](#)).

KEY FINDINGS

5

DECREASE IN RATE OF CANADIANS WHO THINK CANADA SHOULD AIM TO BE AHEAD OF OTHER MAJOR ECONOMIES WHEN IT COMES TO MEETING CLIMATE TARGETS

Just over one in three Canadians think Canada should aim to be ahead of other major economies when it comes to meeting climate targets ([34%](#); [down from 42% in October 2023](#)). Nearly half of respondents said Canada should aim to be at about the same place as other major economies when it comes to meeting climate targets ([49%](#), [up from 40% in 2023](#)) and over one in ten said it should aim to be behind other major economies in that matter ([16%](#)). Residents of BC are more likely to think Canada should aim to be ahead of other major economies when it comes to meeting climate targets ([43%](#)) compared to residents of the Prairies ([23%](#)).

6

MAJORITY OF CANADIANS AGREE GOVERNMENT SHOULD INVEST EQUALLY IN ENERGY INFRASTRUCTURE FOR CONSUMPTION IN CANADA AND FOR EXPORTS

When asked which of the paths forward they would prefer in terms of government investment in energy infrastructure, nearly three in five Canadians say it should invest equally in infrastructure for energy consumption in Canada and for energy exports ([57%](#)), while two in ten prioritize infrastructure for energy consumption in Canada ([21%](#)) and one in ten prioritize infrastructure for energy exports ([11%](#)).

7

CANADIANS SAY CANADA SHOULD PRIORITIZE EUROPE AND ASIA FOR ENERGY EXPORTS, FOLLOWED BY THE UNITED STATES

When asked which energy export destinations Canada should prioritize, one in three say Europe ([35%](#)), one in four says Asia ([24%](#)) and one in five say the United-States ([19%](#)). Residents of BC were twice as likely to say Asia ([35%](#)) than residents of Quebec ([15%](#)), and those who are right-leaning were over five times more likely to say the United-States ([38%](#)) than those who are left-leaning ([7%](#)).

8

ONE IN THREE CANADIANS SAY ENERGY IS THE ECONOMIC SECTOR WITH THE GREATEST POTENTIAL TO DOUBLE CANADA'S EXPORTS TO NON-US DESTINATIONS

When asked to rank which sectors have the most potential to help achieve the objective of doubling Canada's exports to non-US destinations over the next decade, energy ranked in the first place ([37%](#)), followed by minerals and metals ([25%](#)) and agriculture and food ([19%](#)). Those who are right-leaning were more likely to rank energy first ([46%](#)) compared to those who are left-leaning ([24%](#)), and so were residents of the Prairies ([50%](#)), compared to residents of Quebec ([29%](#)).

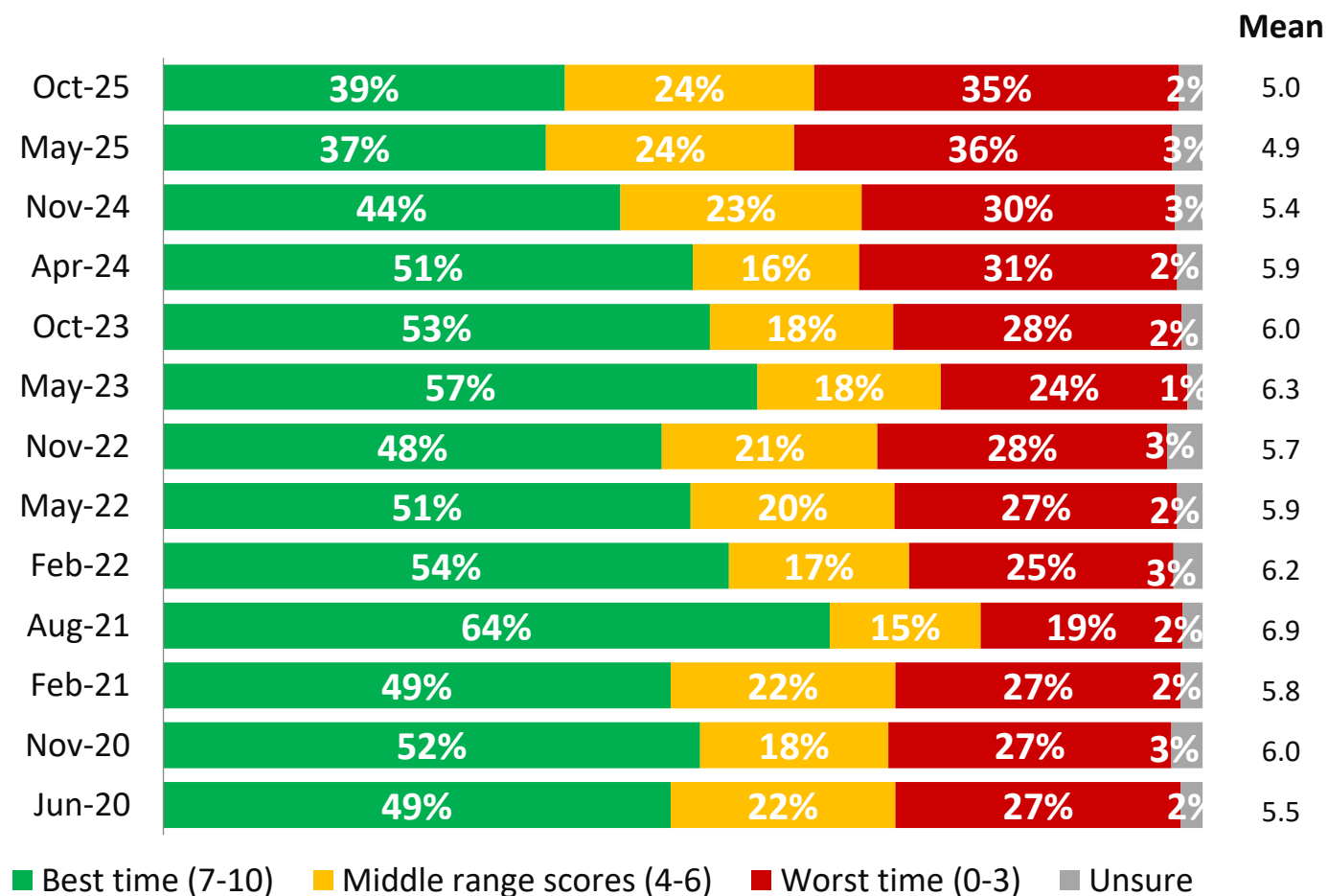
Climate ambition



The opinions of Canadians in terms of how good a time is it for Canada to be ambitious in addressing climate change even if there are costs to the economy are consistent with last wave, with four in ten who say it is the best time (score of 7-10 out of 10) (39%; 37% in May 2025) and over one in three who say it is the worst time (score of 0-3 out of 10) (35%; 36% in May 2025).

Over one in five (22%) continue to say it is the absolute worst time to be ambitious (score of 0 out of 10), while about sixteen per cent say it is the absolute best time to be ambitious (score of 10 out of 10).

Timeliness for Canada to be ambitious in addressing climate change

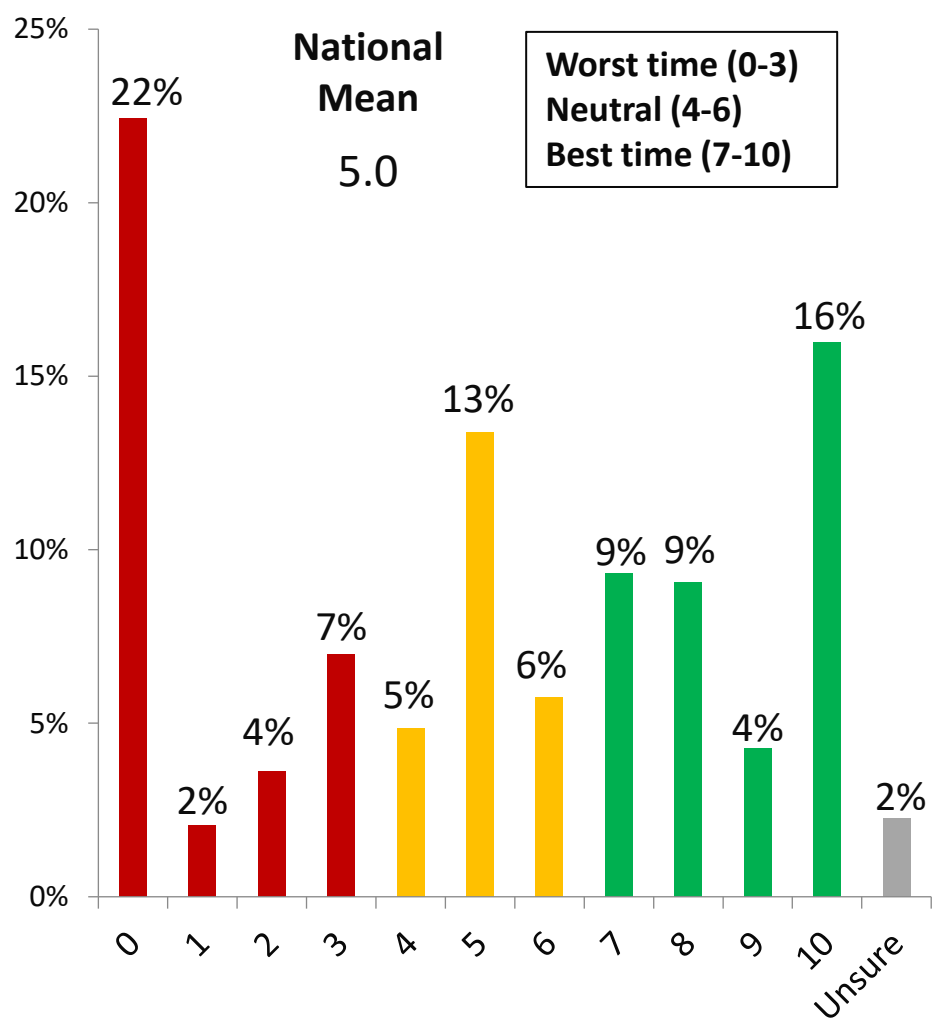


*Weighted to the true population proportion.

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

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Q – As you know many Canadians are concerned about both [ROTATE] climate change and the economy. On a scale of 0 to 10 where 0 means this is absolutely the worst time and 10 is absolutely the best time, how good a time is it for Canada to be ambitious in addressing climate change even if there are costs to the economy?



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

Timeliness for Canada to be ambitious in addressing climate change

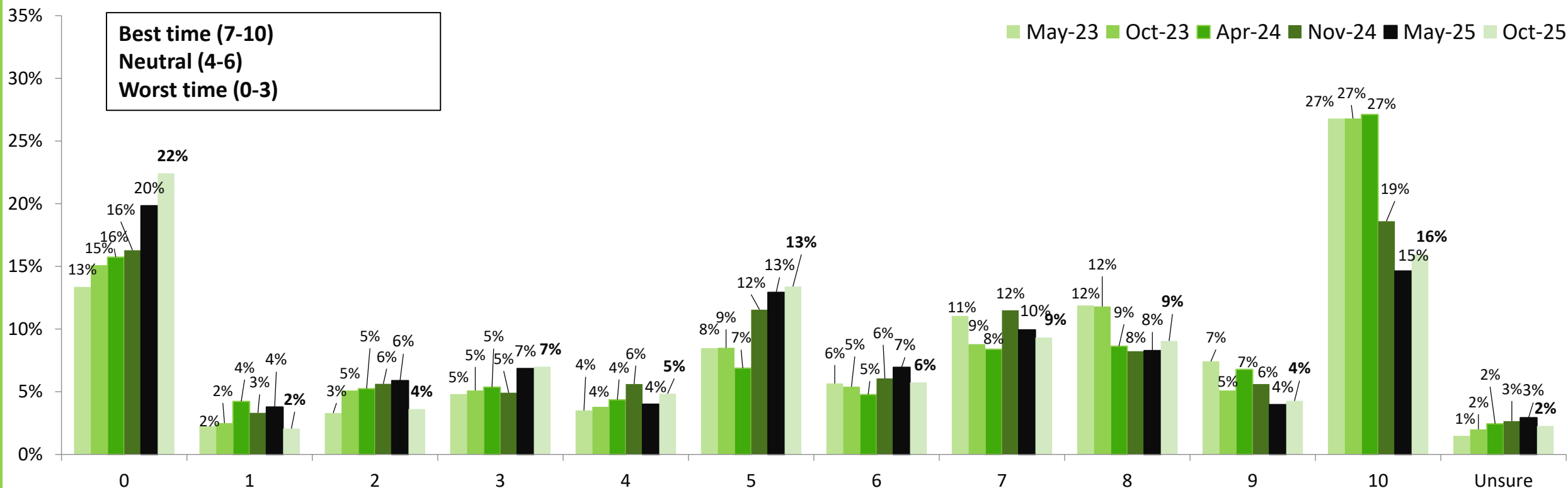
Mean	Atlantic (n=103)	Quebec (n=245)	Ontario (n=323)	Prairies (n=219)	BC (n=155)
	5.4	6.0	4.7	3.7	5.3
	Men (n=539)	Women (n=506)	18 to 34 (n=188)	35 to 54 (n=335)	55 plus (n=522)
Mean	4.5	5.5	5.2	4.5	5.2
	Usually votes LPC (n=348)	Usually votes CPC (n=292)	Usually votes NDP (n=108)	Left-leaning (n=281)	Right-leaning (n=260)
	6.2	1.9	7.5	7.5	2.4

Q – As you know many Canadians are concerned about both [ROTATE] climate change and the economy. On a scale of 0 to 10 where 0 means this is absolutely the worst time and 10 is absolutely the best time, how good a time is it for Canada to be ambitious in addressing climate change even if there are costs to the economy?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Distribution of responses on timeliness for Canada to be ambitious addressing climate change

Q – As you know many Canadians are concerned about both [ROTATE] climate change and the economy. On a scale of 0 to 10 where 0 means this is absolutely the worst time and 10 is absolutely the best time, how good a time is it for Canada to be ambitious in addressing climate change even if there are costs to the 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, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Reason for considering timeliness of Canada to be ambitious in addressing climate change

9

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

		Total			Best Time (7-10)			Neutral (4-6)			Worst Time (0-3)		
		2025-10 (n=894)	2025-05 (n=818)	2024-11 (n=792)	2025-10 (n=344)	2025-05 (n=318)	2024-11 (n=361)	2025-10 (n=212)	2025-05 (n=179)	2024-11 (n=160)	2025-10 (n=322)	2025-05 (n=310)	2024-11 (n=257)
TOP RESPONSES	We need to act now, climate change can't wait	27.9%	30.0%	41.9%	66.4%	66.5%	82.4%	8.4%	13.5%	13.7%	-	0.7%	0.5%
	There are other priorities/focus should be on health/basic needs (food, heat for winter, etc.)	10.0%	12.3%	10.5%	0.4%	1.4%	1.5%	10.4%	22.8%	21.3%	20.8%	17.6%	17.3%
	Both the economy and the environment need to be taken into consideration	8.9%	8.3%	5.6%	6.8%	8.9%	3.5%	21.3%	16.1%	16.7%	2.0%	2.7%	1.8%
	US relations/Trump/tariffs*	8.3%	1.9%	N/A	3.7%	1.3%	N/A	11.8%	2.2%	N/A	11.4%	2.5%	N/A
	Current financial situation/inflation/upcoming recession	7.5%	5.2%	3.4%	0.9%	-	0.6%	11.7%	7.7%	6.7%	12.3%	9.8%	5.7%
	I do not believe climate change is real or caused by humans/not a serious issue	6.7%	7.5%	3.5%	0.2%	0.8%	0.2%	2.1%	2.9%	1.4%	17.2%	18.2%	10.1%
	Canada's impact on climate change is minimal	5.6%	10.5%	6.8%	-	0.3%	-	4.4%	4.6%	5.3%	12.8%	26.0%	18.5%
	Diversifying into alternative energy sources and more environmentally friendly solutions could help the economy and provinces	4.8%	7.0%	1.9%	8.4%	13.8%	2.0%	4.6%	4.4%	1.9%	1.1%	1.4%	1.9%
	Addressing climate change would cost too much money/raise taxes	3.6%	3.6%	3.0%	0.8%	0.7%	0.7%	4.6%	3.3%	4.4%	6.3%	6.8%	5.6%
	Need to take action with caution/slowly/have a plan	2.9%	2.9%	1.3%	2.8%	1.8%	1.3%	7.0%	8.0%	1.4%	0.4%	1.1%	1.4%
	The government has not been effective in addressing climate changes/lack of trust and blame towards the government	2.1%	2.6%	5.0%	1.3%	1.6%	1.9%	0.7%	2.8%	2.2%	4.0%	3.1%	11.5%

*Answer was added in the May 2025 wave

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=894, accurate 3.3 percentage points plus or minus, 19 times out of 20.

Energy affordability

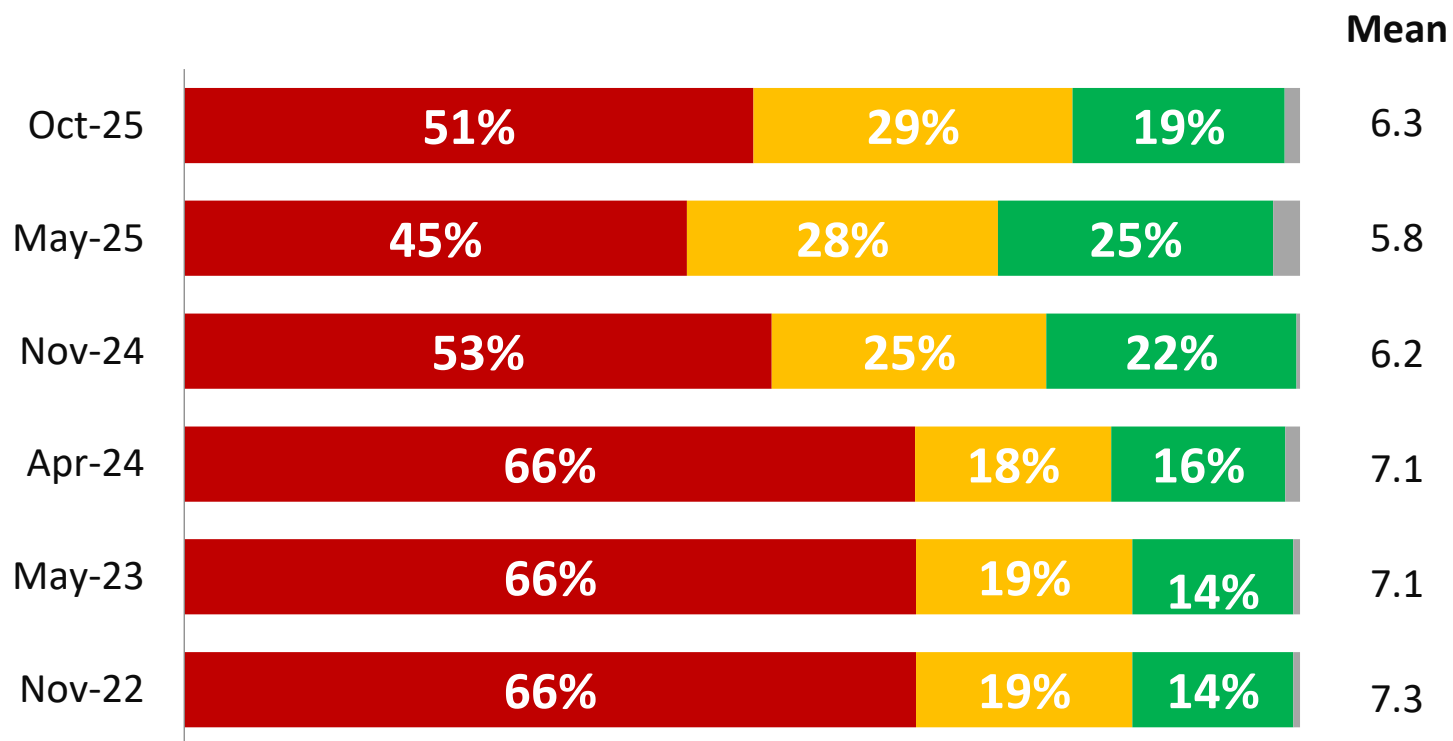


Concern over energy prices in the next six months (score of 7 to 10 out of 10) (51%) has increased since the most recent wave in May 2025 (45%).

Residents of the Atlantic region are more likely to be concerned (mean of 7.4 out of 10) than residents of Quebec (mean of 5.9 out of 10).

Of note, one in four Canadians rate their level of concern a 10 out of 10 (24%, see next slide)

Level of concern for energy prices over next six months



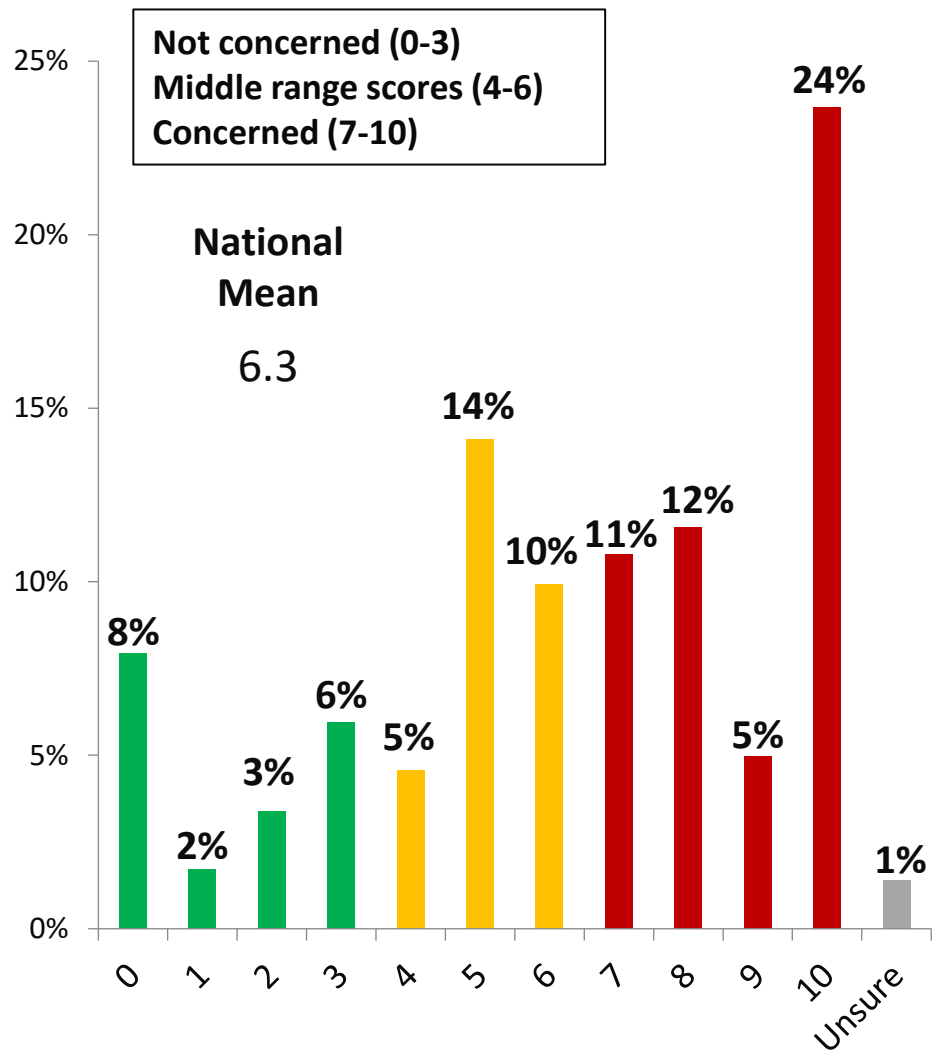
■ Concerned (7-10) ■ Middle range scores (4-6) ■ Not concerned (0-3) ■ Unsure

*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, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Q – On a scale of 0 to 10 where 0 is not at all concerned and 10 is very concerned, how would you rate your concern for energy prices you will pay for things like heating and transportation over the next six months?



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

Level of concern for energy prices over next six months

	Atlantic (n=103)	Quebec (n=245)	Ontario (n=323)	Prairies (n=219)	BC (n=155)
Mean	7.4	5.9	6.1	6.8	6.4
	Men (n=539)	Women (n=506)	18 to 34 (n=188)	35 to 54 (n=335)	55 plus (n=522)
Mean	6.1	6.6	6.7	6.6	5.9
	Usually votes LPC (n=348)	Usually votes CPC (n=292)	Usually votes NDP (n=108)	Left-leaning (n=281)	Right-leaning (n=260)
Mean	5.7	7.4	5.9	5.4	7.1

Q – On a scale of 0 to 10 where 0 is not at all concerned and 10 is very concerned, how would you rate your concern for energy prices you will pay for things like heating and transportation over the next six months?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Reason for level of concern for energy prices over next six months

Q – Why do you have that opinion [OPEN]

		Total			Concerned (7-10)			Middle range score (4-6)			Not concerned (0-3)		
		2025-10 (n=821)	2025-05 (n=697)	2024-11 (n=739)	2025-10 (n=415)	2025-05 (n=327)	2024-11 (n=395)	2025-10 (n=225)	2025-05 (n=179)	2024-11 (n=171)	2025-10 (n=172)	2025-05 (n=181)	2024-11 (n=173)
TOP RESPONSES	I can afford it/not expensive/not concerned	22.0%	21.1%	14.1%	2.9%	0.9%	2.8%	31.2%	33.0%	18.9%	57.8%	44.5%	33.9%
	High cost/prices are increasing	16.0%	10.7%	7.2%	24.9%	18.4%	11.2%	11.6%	7.1%	5.9%	-	1.2%	-
	Inflation/everything is expensive/cost of living	10.9%	6.7%	5.4%	17.8%	11.6%	8.2%	5.8%	4.6%	3.4%	0.7%	0.8%	1.0%
	I depend on it/have to be paid for/energy prices affect our lives/living costs	7.1%	4.8%	12.3%	10.0%	7.3%	19.1%	5.2%	1.7%	7.6%	2.2%	3.7%	2.4%
	I limit my use of energy/fossil fuels	6.4%	6.6%	9.6%	0.8%	2.4%	1.4%	9.8%	7.4%	16.7%	16.1%	13.3%	20.6%
	I cannot afford it/my pay does not increase	5.6%	6.9%	5.6%	9.8%	13.9%	9.6%	2.0%	2.1%	2.7%	-	-	-
	Carbon tax/high taxes	4.0%	8.7%	6.1%	6.1%	14.7%	11.0%	2.2%	5.0%	1.6%	1.1%	2.4%	-
	Result of war/conflict/ world's events	3.8%	2.4%	2.6%	3.2%	2.6%	3.2%	6.1%	2.9%	2.6%	1.7%	0.8%	1.4%
	It benefits the companies/price gouging	3.6%	2.3%	3.0%	6.1%	3.5%	4.2%	1.3%	3.3%	2.1%	0.2%	-	1.5%
	We have energy in Canada	3.5%	3.7%	1.7%	2.6%	4.3%	3.1%	5.1%	3.5%	0.4%	3.5%	4.5%	-

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=821, accurate 3.4 percentage points plus or minus, 19 times out of 20.

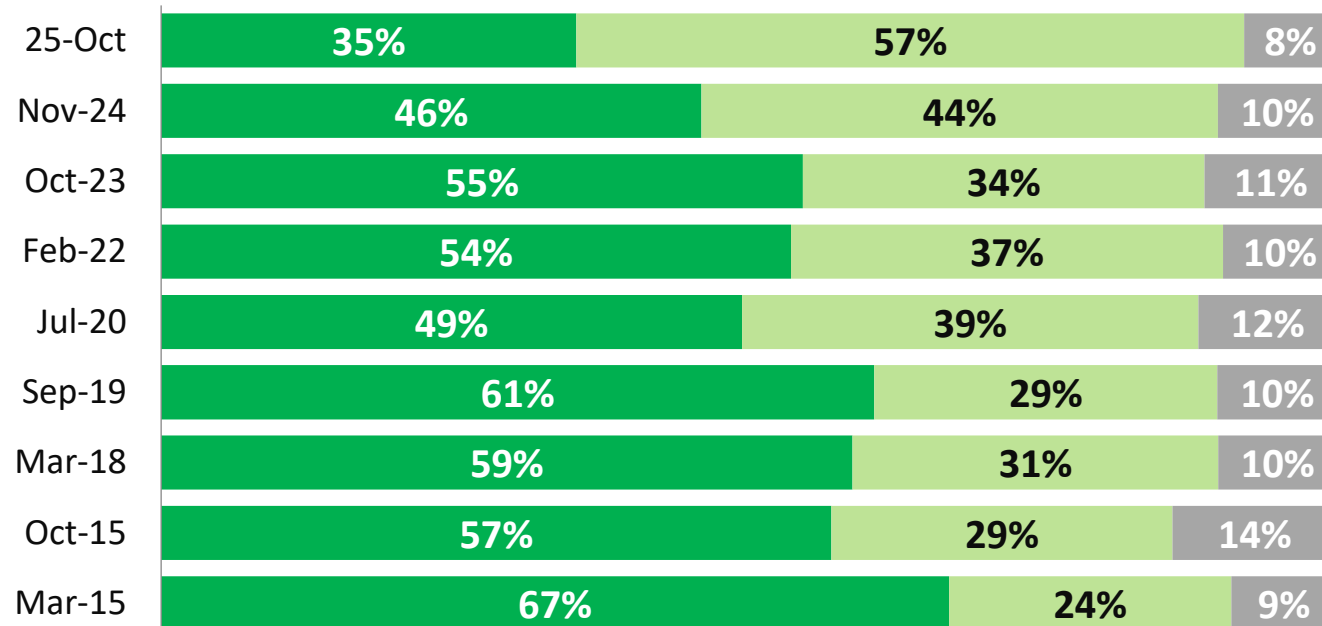
A background image showing two business professionals in a modern office setting. They are shaking hands over a desk. One person is holding a document labeled 'RESUME'. On the desk, there is a pen and a laptop. The image is dimmed, and there are bright green decorative triangles in the top right and bottom right corners.

Environment/climate vs economy/jobs

There has been a significant increase in respondents who think growth and creating jobs should be the top priority even if the environment suffers to some extent (57%, compared to 44% in November 2024), while those who think protecting the environment should be given priority, even if it causes slower economic growth and some loss of jobs has decreased by more than ten percentage points (35%, compared to 46% in November 2024).

Those who usually vote for the Conservative Party of Canada (88%) are over four times more likely to prioritize growth and creating jobs than those who usually vote for the New Democratic Party of Canada (19%).

Prioritizing the environment or economic growth



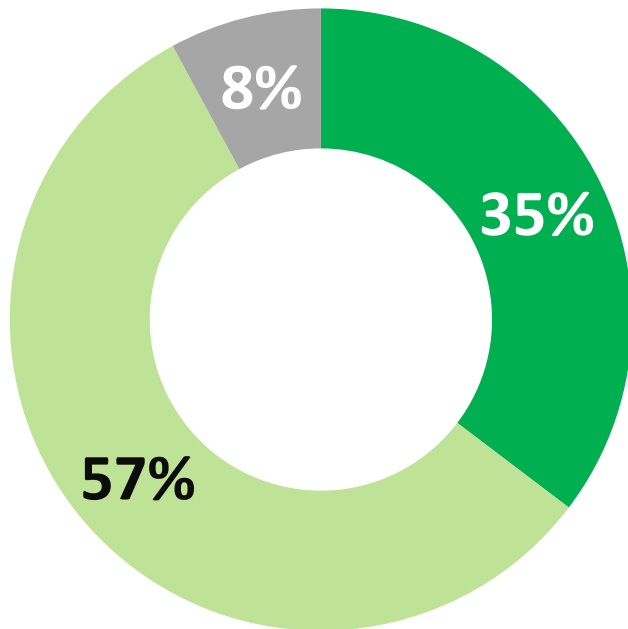
- Protecting the environment should be given priority, even if it causes slower economic growth and some loss of jobs
- Growth and creating jobs should be the top priority, even if the environment suffers to some extent
- Unsure

*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, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Q – Which of the following two statements do you agree with most [ROTATE] Protecting the environment should be given priority, even if it causes slower economic growth and some loss of jobs OR growth and creating jobs should be the top priority, even if the environment suffers to some extent?



- Protecting the environment should be given priority, even if it causes slower economic growth and some loss of jobs
- Growth and creating jobs should be the top priority, even if the environment suffers to some extent
- Unsure

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

Prioritizing the environment or economic growth

Protecting the environment

Atlantic (n=103)	Quebec (n=245)	Ontario (n=323)	Prairies (n=219)	BC (n=155)
36.0%	42.6%	31.7%	26.9%	43.6%
Men (n=539)	Women (n=506)	18 to 34 (n=188)	35 to 54 (n=335)	55 plus (n=522)
29.7%	40.7%	44.0%	29.0%	34.7%
Usually votes LPC (n=348)	Usually votes CPC (n=292)	Usually votes NDP (n=108)	Left-leaning (n=281)	Right-leaning (n=260)
41.0%	7.8%	73.7%	68.9%	10.2%

Growth and creating jobs

Atlantic (n=103)	Quebec (n=245)	Ontario (n=323)	Prairies (n=219)	BC (n=155)
58.2%	46.1%	61.0%	67.1%	49.0%
Men (n=539)	Women (n=506)	18 to 34 (n=188)	35 to 54 (n=335)	55 plus (n=522)
64.8%	49.1%	53.5%	60.5%	56.0%
Usually votes LPC (n=348)	Usually votes CPC (n=292)	Usually votes NDP (n=108)	Left-leaning (n=281)	Right-leaning (n=260)
49.8%	87.5%	19.4%	24.7%	85.9%

Q – Which of the following two statements do you agree with most [ROTATE] Protecting the environment should be given priority, even if it causes slower economic growth and some loss of jobs OR growth and creating jobs should be the top priority, even if the environment suffers to some extent?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.



Confidence and Canada's international positioning for emissions reductions

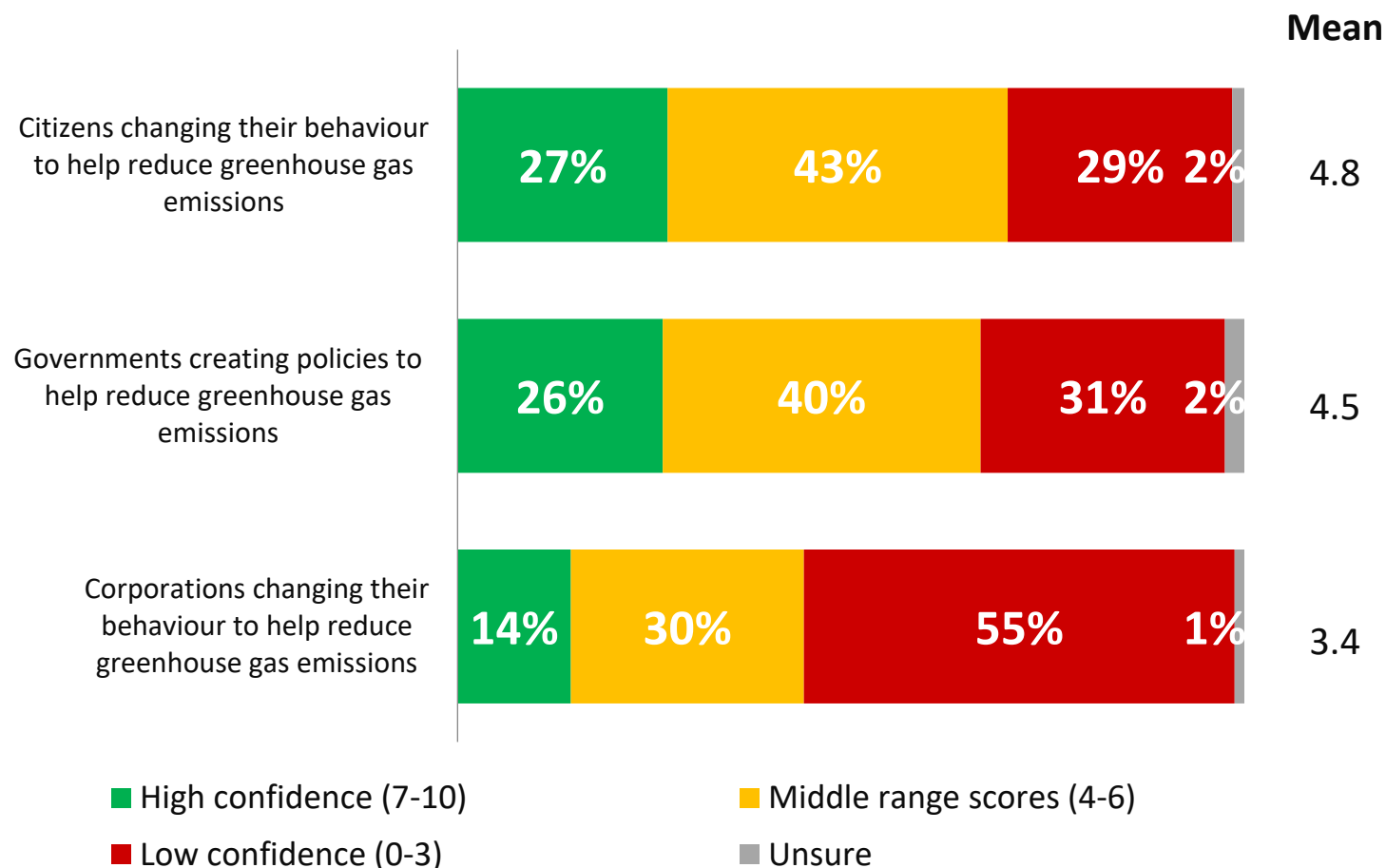
Canadians are split on their level of confidence in citizens changing their behaviour to help reduce greenhouse gas emissions, with over one in four having high confidence (score of 7 to 10 out of 10) and over one in four having low confidence (score of 0 to 3 out of 10).

Another one in four have high confidence (score of 7 to 10 out of 10) in governments creating policies to help reduce greenhouse gas emissions (26%), although more Canadians have low confidence (score of 0 to 3 out of 10) (31%).

Close to six in ten respondents have low confidence (score of 0 to 3 out of 10) in corporations changing their behaviour to help reduce greenhouse gas emissions (55%).

Q – Reducing greenhouse gas emissions involves a number of players to take action. How much confidence do you have in the following players to take action to reduce Canada's greenhouse gas emissions where 0 is no confidence at all and 10 is absolute confidence? [RANDOMIZE]

Confidence in players to take action to reduce greenhouse gas emissions



*Weighted to the true population proportion.

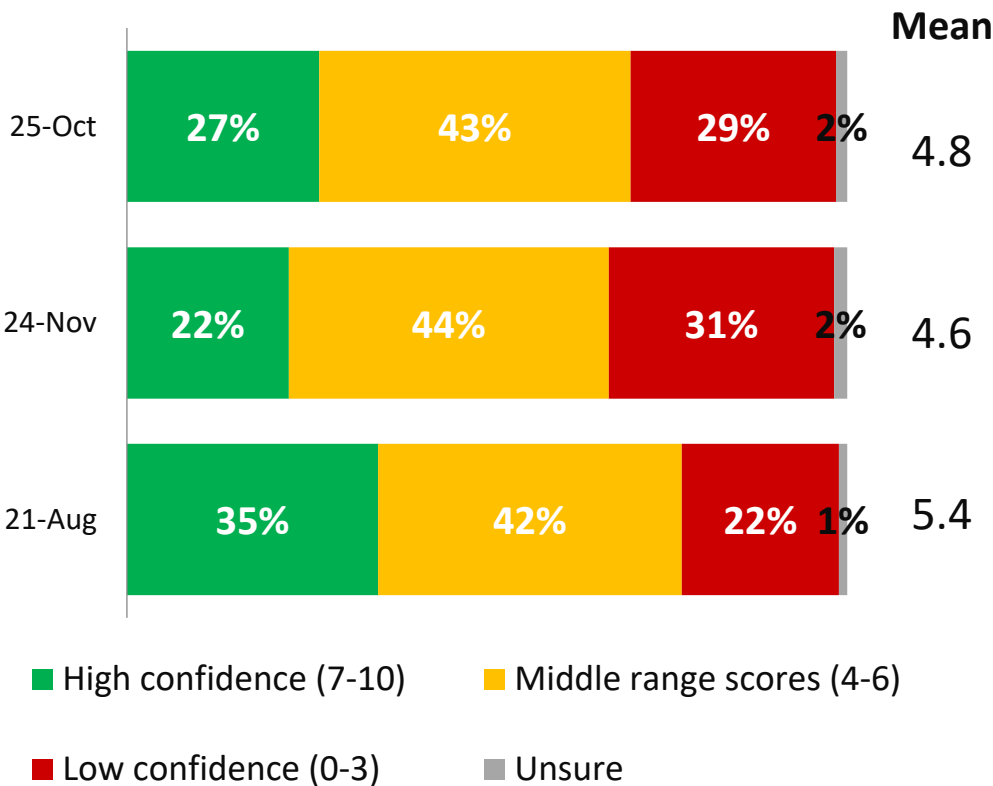
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Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Confidence in citizens to take action to reduce greenhouse gas emissions

Q – Reducing greenhouse gas emissions involves a number of players to take action. How much confidence do you have in the following players to take action to reduce Canada’s greenhouse gas emissions where 0 is no confidence at all and 10 is absolute confidence? [RANDOMIZE]

Citizens changing their behavior to help reduce greenhouse gas emissions



Mean	Atlantic (n=103)	Quebec (n=245)	Ontario (n=323)	Prairies (n=219)	BC (n=155)
	4.9	4.8	4.9	4.7	5.1
	Men (n=539)	Women (n=506)	18 to 34 (n=188)	35 to 54 (n=335)	55 plus (n=522)
	4.6	5.1	4.7	4.9	4.9
	Usually votes LPC (n=348)	Usually votes CPC (n=292)	Usually votes NDP (n=108)	Left-leaning (n=281)	Right-leaning (n=260)
	5.0	4.6	4.8	4.9	4.4

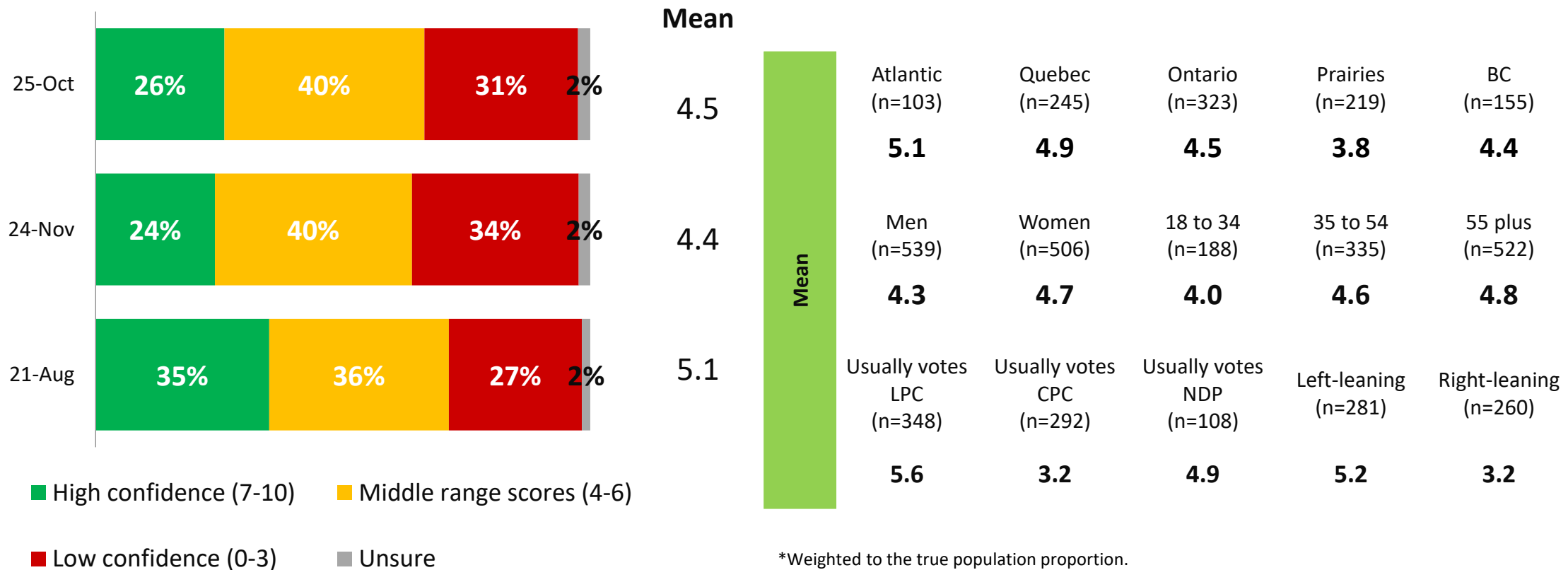
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Confidence in governments to take action to reduce greenhouse gas emissions

Q – Reducing greenhouse gas emissions involves a number of players to take action. How much confidence do you have in the following players to take action to reduce Canada's greenhouse gas emissions where 0 is no confidence at all and 10 is absolute confidence? [RANDOMIZE]

Governments creating policies to help reduce greenhouse gas emissions



*Weighted to the true population proportion.

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

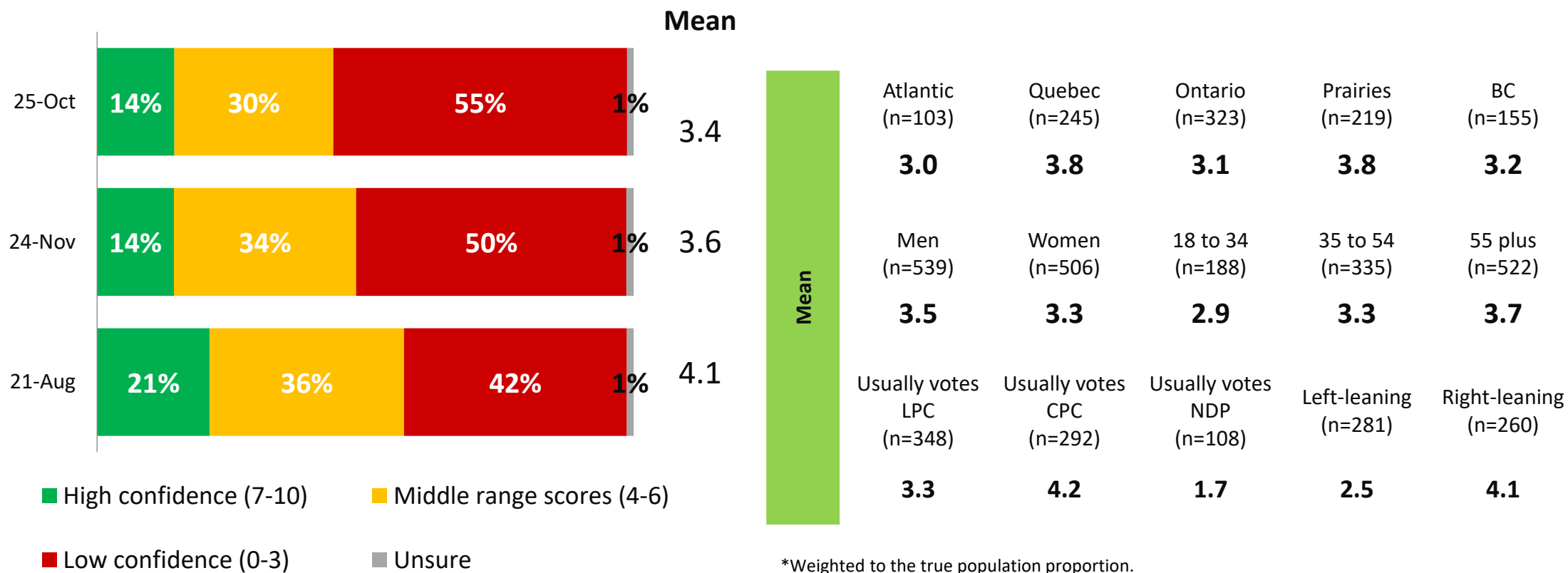
Mean	Atlantic (n=103)	Quebec (n=245)	Ontario (n=323)	Prairies (n=219)	BC (n=155)
	5.1	4.9	4.5	3.8	4.4
Mean	Men (n=539)	Women (n=506)	18 to 34 (n=188)	35 to 54 (n=335)	55 plus (n=522)
	4.3	4.7	4.0	4.6	4.8
Mean	Usually votes LPC (n=348)	Usually votes CPC (n=292)	Usually votes NDP (n=108)	Left-leaning (n=281)	Right-leaning (n=260)
	5.6	3.2	4.9	5.2	3.2

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Confidence in corporations to take action to reduce greenhouse gas emissions

Q – Reducing greenhouse gas emissions involves a number of players to take action. How much confidence do you have in the following players to take action to reduce Canada's greenhouse gas emissions where 0 is no confidence at all and 10 is absolute confidence? [RANDOMIZE]

Corporations changing their behaviour to help reduce greenhouse gas emissions



*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, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

POSITIVE ENERGY

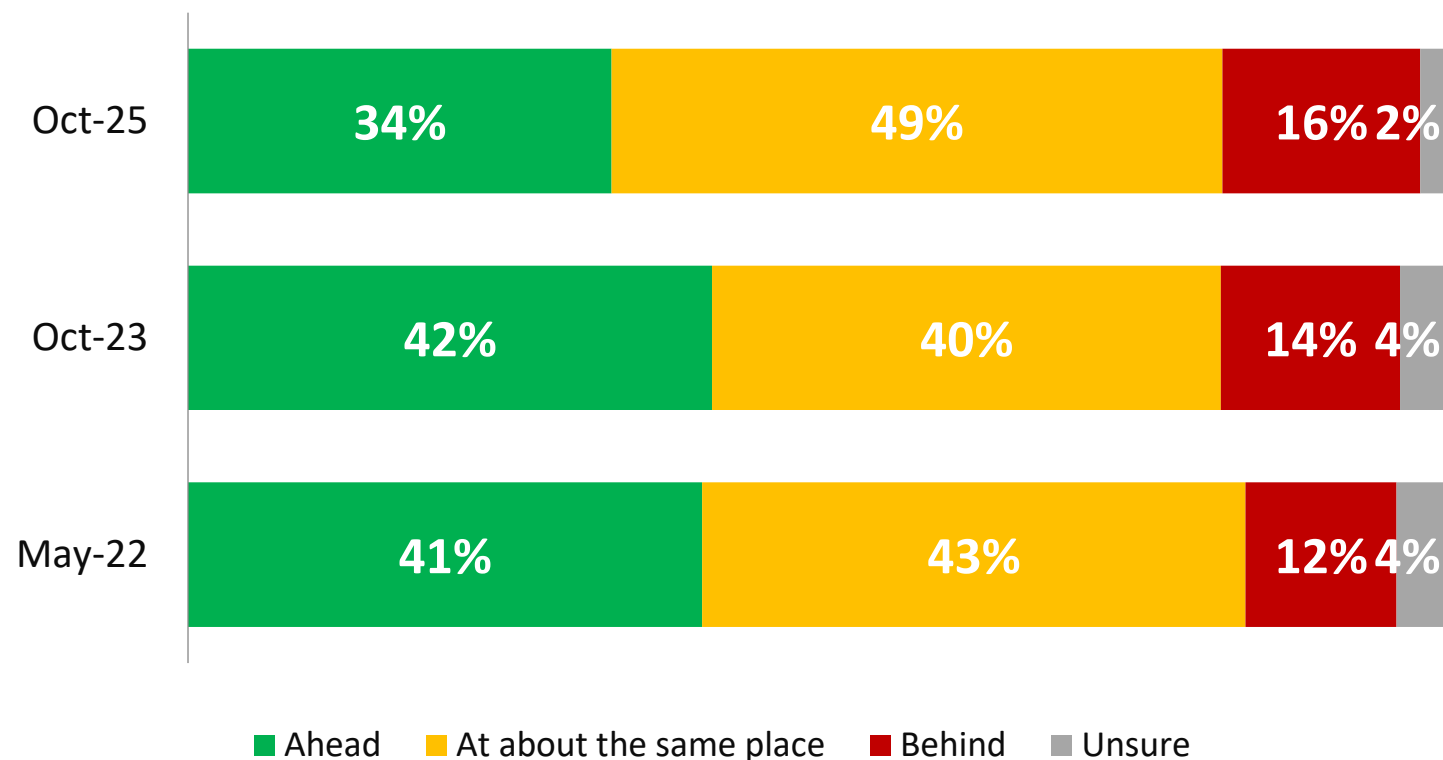


About one in three Canadians think Canada should aim to be ahead of other major economies when it comes to meeting climate targets (34%), which is a decrease since last wave (42% in October 2023).

Nearly one in two respondents said Canada should aim to be at about the same place as other major economies when it comes to meeting climate targets (49%) and over one in ten said it should aim to be behind other major economies in that matter (16%).

Q – Do you think Canada should aim to be ahead, at about the same place or be behind other major economies when it comes to meeting climate targets?

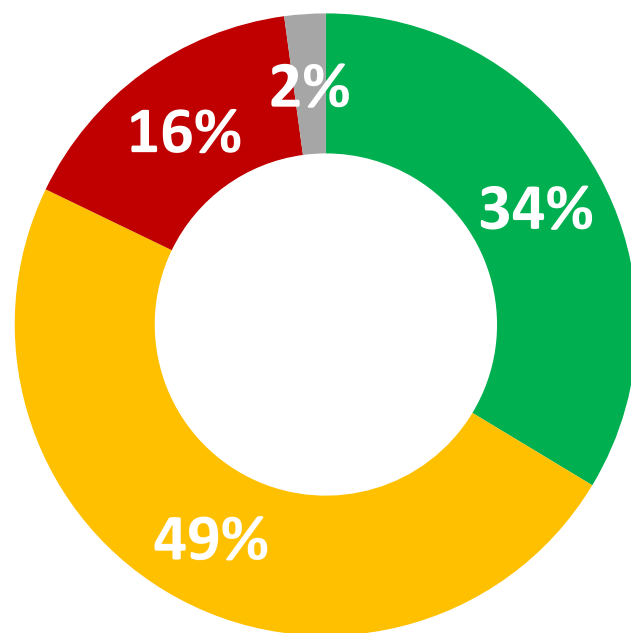
Canada's position meeting climate targets compared to other major economies



*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, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.



- Ahead
- At about the same place
- Behind
- Unsure

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

Canada's position meeting climate targets compared to other major economies

At about the same place

Atlantic (n=103)	Quebec (n=245)	Ontario (n=323)	Prairies (n=219)	BC (n=155)
44.5%	46.7%	52.4%	51.0%	39.4%
Men (n=539)	Women (n=506)	18 to 34 (n=188)	35 to 54 (n=335)	55 plus (n=522)
50.6%	46.5%	42.4%	50.3%	51.1%
Usually votes LPC (n=348)	Usually votes CPC (n=292)	Usually votes NDP (n=108)	Left-leaning (n=281)	Right-leaning (n=260)
54.0%	53.0%	27.3%	32.6%	48.3%

Ahead

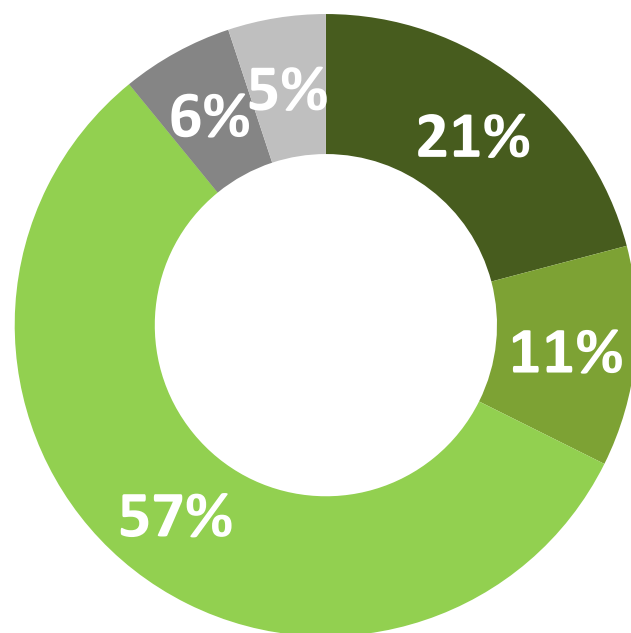
Atlantic (n=103)	Quebec (n=245)	Ontario (n=323)	Prairies (n=219)	BC (n=155)
37.6%	41.0%	30.3%	22.7%	42.8%
Men (n=539)	Women (n=506)	18 to 34 (n=188)	35 to 54 (n=335)	55 plus (n=522)
28.4%	38.6%	41.4%	31.0%	30.7%
Usually votes LPC (n=348)	Usually votes CPC (n=292)	Usually votes NDP (n=108)	Left-leaning (n=281)	Right-leaning (n=260)
40.0%	9.1%	68.8%	65.3%	9.4%

Q – Do you think Canada should aim to be ahead, at about the same place or be behind other major economies when it comes to meeting climate targets?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

The background of the slide features a low-angle shot of a tall, ornate Gothic cathedral tower, likely the spire of a major Canadian church. The tower is constructed from light-colored stone and has multiple levels of arched windows. At the very top, a small Canadian flag flies. Several larger Canadian flags are positioned in the foreground, partially obscuring the tower and waving in the wind. The entire scene is set against a clear, deep blue sky. A semi-transparent dark blue overlay covers the entire image, and a bright green geometric shape is visible in the top right corner.

Views on government investment in energy infrastructure and exports



■ Prioritizing infrastructure investments for energy consumption in Canada

■ Prioritizing infrastructure investments for the export of energy

■ Both should be done equally

■ Government should not invest in energy infrastructure

■ Unsure

*Weighted to the true population proportion.

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

Government investment in energy infrastructure

Both should be done equally

Atlantic (n=103)	Quebec (n=245)	Ontario (n=323)	Prairies (n=219)	BC (n=155)
71.1%	52.6%	58.0%	60.3%	48.8%
Men (n=539)	Women (n=506)	18 to 34 (n=188)	35 to 54 (n=335)	55 plus (n=522)
54.5%	58.9%	52.1%	57.9%	58.8%
Usually votes LPC (n=348)	Usually votes CPC (n=292)	Usually votes NDP (n=108)	Left-leaning (n=281)	Right-leaning (n=260)
61.6%	60.5%	42.9%	46.6%	54.6%

Prioritizing infrastructure investments for energy consumption in Canada

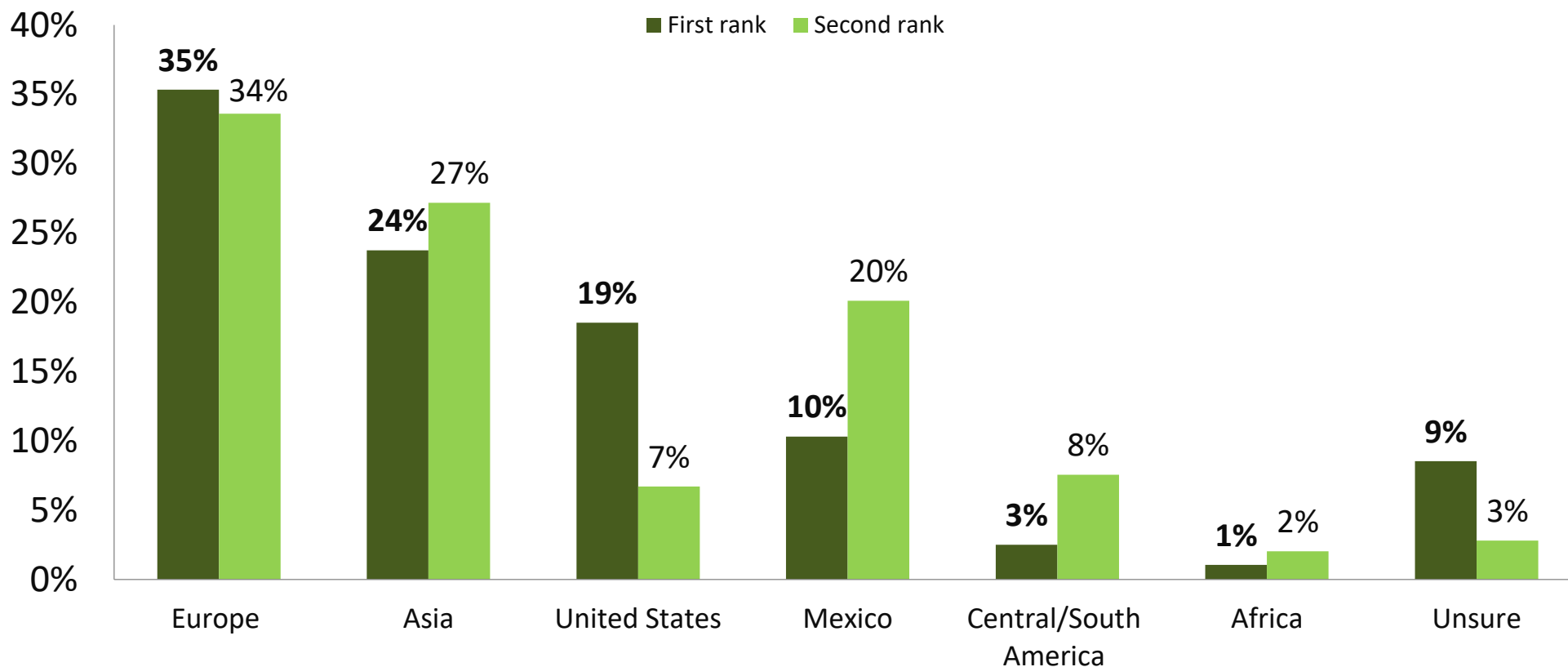
Atlantic (n=103)	Quebec (n=245)	Ontario (n=323)	Prairies (n=219)	BC (n=155)
14.2%	25.4%	20.2%	13.9%	27.3%
Men (n=539)	Women (n=506)	18 to 34 (n=188)	35 to 54 (n=335)	55 plus (n=522)
19.7%	22.1%	27.1%	19.9%	17.6%
Usually votes LPC (n=348)	Usually votes CPC (n=292)	Usually votes NDP (n=108)	Left-leaning (n=281)	Right-leaning (n=260)
21.7%	12.1%	42.0%	33.7%	14.6%

Q – In terms of government investment in energy infrastructure, which of the following paths forward would you prefer?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Canada's energy exports destinations

Q – Thinking of Canada's energy exports, which export destinations should Canada prioritize? Please rank the potential export destinations where 1 is the destination that Canada should prioritize the most and 2 the 2nd most. [RANDOMIZE]



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,043, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Canada's energy exports destinations by demographics – First ranked

Q – Thinking of Canada's energy exports, which export destinations should Canada prioritize? Please rank the potential export destinations where 1 is the destination that Canada should prioritize the most and 2 the 2nd most. [RANDOMIZE]

	2025-10 (n=1043)	Atlantic (n=103)	Quebec (n=243)	Ontario (n=323)	Prairies (n=219)	BC (n=155)	Men (n=538)	Women (n=505)	18-34 (n=187)	35-54 (n=335)	55 plus (n=521)	
1 st Rank	Europe	35.3%	43.0%	36.7%	36.0%	34.5%	28.7%	33.3%	37.3%	31.7%	31.6%	40.6%
	Asia	23.7%	18.4%	14.5%	25.8%	24.4%	35.2%	31.4%	16.4%	18.2%	26.9%	24.8%
	United States	18.5%	19.0%	23.4%	17.0%	18.9%	14.1%	22.6%	14.7%	24.4%	18.6%	14.7%
	Mexico	10.3%	9.7%	11.3%	8.7%	12.8%	10.5%	6.8%	13.7%	12.1%	9.2%	10.0%
	Central/South America	2.5%	0.9%	3.9%	2.1%	1.7%	3.2%	0.9%	4.0%	2.8%	3.7%	1.4%
	Africa	1.0%	-	1.3%	1.5%	0.6%	0.6%	1.0%	1.1%	0.8%	1.4%	0.9%
	Unsure	8.5%	9.1%	9.1%	9.0%	7.1%	7.8%	4.0%	12.9%	9.9%	8.6%	7.6%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,043, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Canada's energy exports destinations by political leaning – First ranked

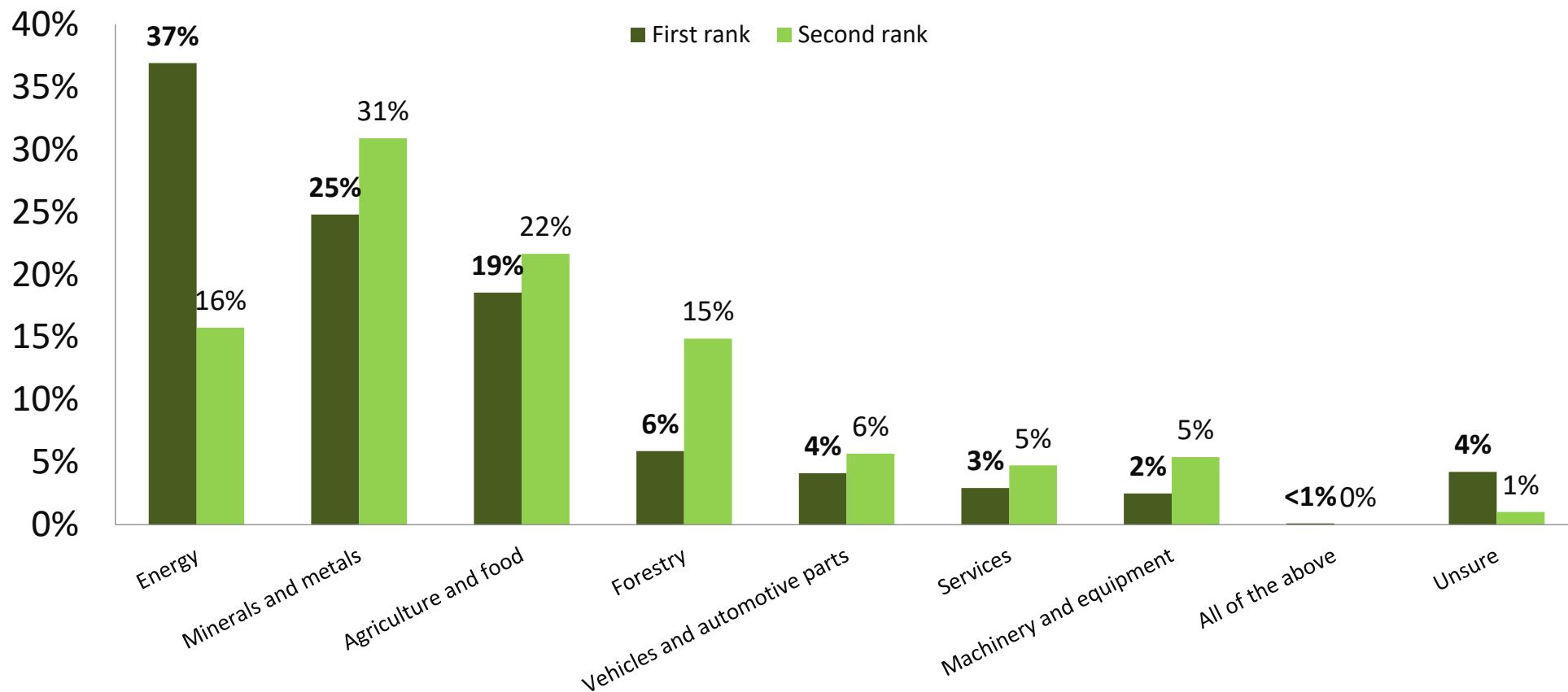
Q – Thinking of Canada's energy exports, which export destinations should Canada prioritize? Please rank the potential export destinations where 1 is the destination that Canada should prioritize the most and 2 the 2nd most. [RANDOMIZE]

	2025-10 (n=1043)	Usually votes LPC (n=348)	Usually votes CPC (n=292)	Usually votes NDP (n=108)	Left-leaning (n=281)	Right-leaning (n=259)
1st Rank						
Europe	35.3%	37.1%	31.6%	32.7%	39.2%	31.2%
Asia	23.7%	29.8%	20.7%	19.4%	20.7%	22.3%
United States	18.5%	12.7%	35.7%	2.9%	6.5%	38.3%
Mexico	10.3%	12.8%	6.9%	18.2%	16.0%	4.5%
Unsure	8.5%	5.4%	4.3%	22.4%	12.8%	2.4%
Central/South America	2.5%	2.3%	0.8%	2.2%	2.6%	1.3%
Africa	1.0%	-	-	2.1%	2.2%	-

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,043, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Sectors for non-US destinations' exports

Q – The federal government has set the objective of doubling Canada's exports to non-US destinations over the next decade. Please rank the following sectors in terms of their potential to help achieve this goal, where 1 is the sector with the most potential and 2 the 2nd most. [RANDOMIZE]



Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,041, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Sectors for non-US destinations' exports - by demographics – First ranked

Q – The federal government has set the objective of doubling Canada's exports to non-US destinations over the next decade. Please rank the following sectors in terms of their potential to help achieve this goal, where 1 is the sector with the most potential and 2 the 2nd most. [RANDOMIZE]

		2025-10 (n=1041)	Atlantic (n=103)	Quebec (n=243)	Ontario (n=322)	Prairies (n=218)	BC (n=155)	Men (n=536)	Women (n=505)	18-34 (n=188)	35-54 (n=333)	55 plus (n=520)
1 st Rank	Energy	36.9%	31.3%	28.5%	36.1%	50.1%	39.4%	40.0%	34.0%	35.1%	37.2%	37.8%
	Minerals and metals	24.8%	30.4%	34.7%	26.0%	11.5%	19.3%	26.3%	23.4%	21.7%	26.5%	25.5%
	Agriculture and food	18.6%	17.5%	13.1%	20.1%	22.8%	18.4%	16.4%	20.6%	16.6%	15.2%	22.4%
	Forestry	5.9%	10.0%	9.6%	1.9%	2.8%	12.5%	4.5%	7.2%	4.6%	8.3%	4.8%
	Vehicles and automotive parts	4.1%	4.8%	3.7%	5.6%	3.0%	1.6%	3.0%	5.2%	7.1%	3.1%	2.9%
	Machinery and equipment	2.5%	1.2%	2.9%	2.4%	3.7%	1.0%	2.9%	2.1%	2.5%	2.8%	2.2%
	Services	2.9%	-	3.4%	3.7%	2.1%	2.7%	3.4%	2.5%	5.3%	2.2%	1.9%
	All of the above	0.1%	-	-	-	-	0.7%	-	0.2%	-	0.3%	-
	Unsure	4.2%	4.7%	4.2%	4.2%	4.0%	4.4%	3.6%	4.8%	7.1%	4.2%	2.3%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, October 27th and 30th, 2025, n=1041, accurate 3.0 percentage points plus or minus, 19 times out of 20.

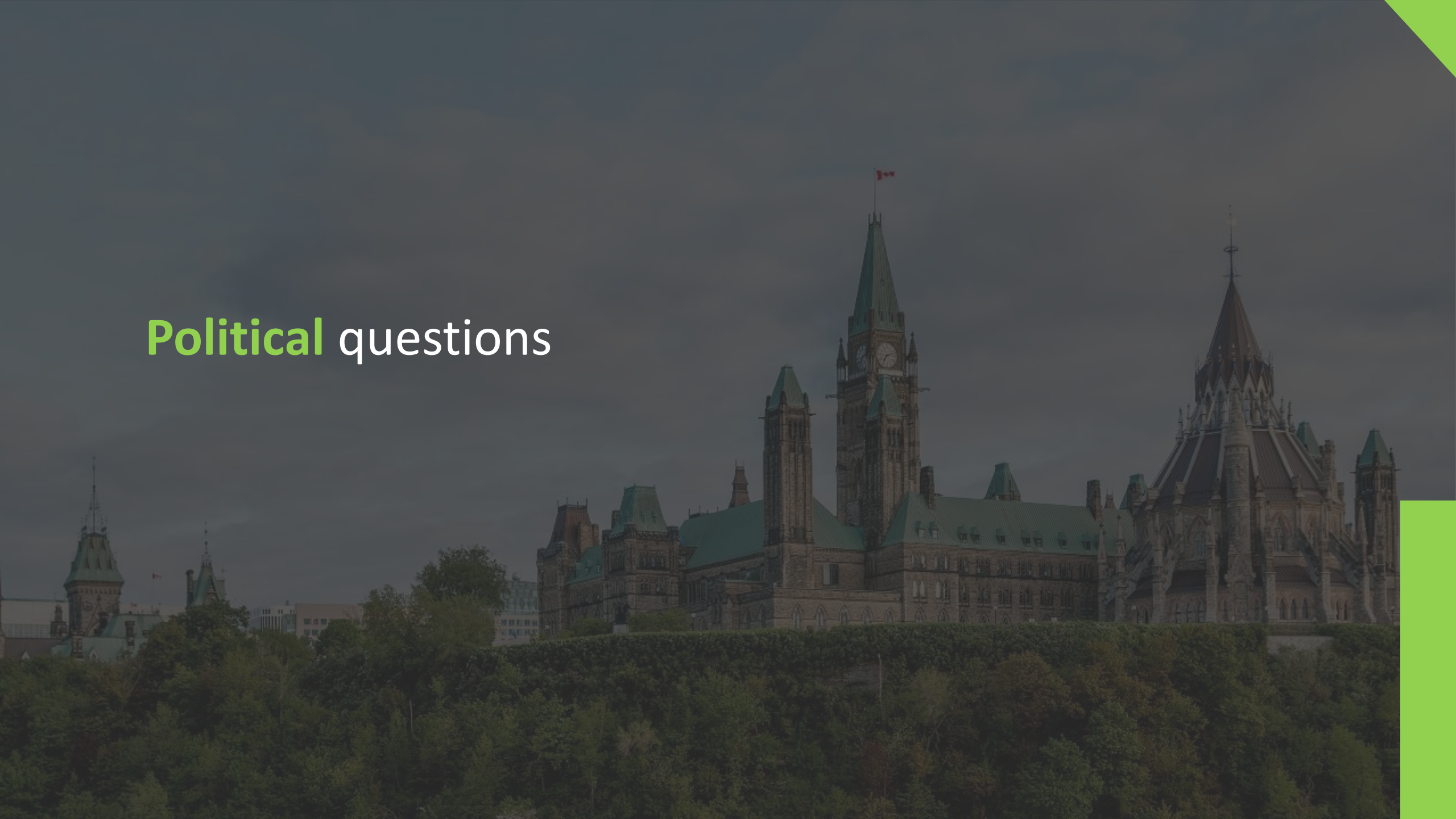
Sectors for non-US destinations' exports - by vote and political spectrum – First ranked

Q – The federal government has set the objective of doubling Canada's exports to non-US destinations over the next decade. Please rank the following sectors in terms of their potential to help achieve this goal, where 1 is the sector with the most potential and 2 the 2nd most. [RANDOMIZE]

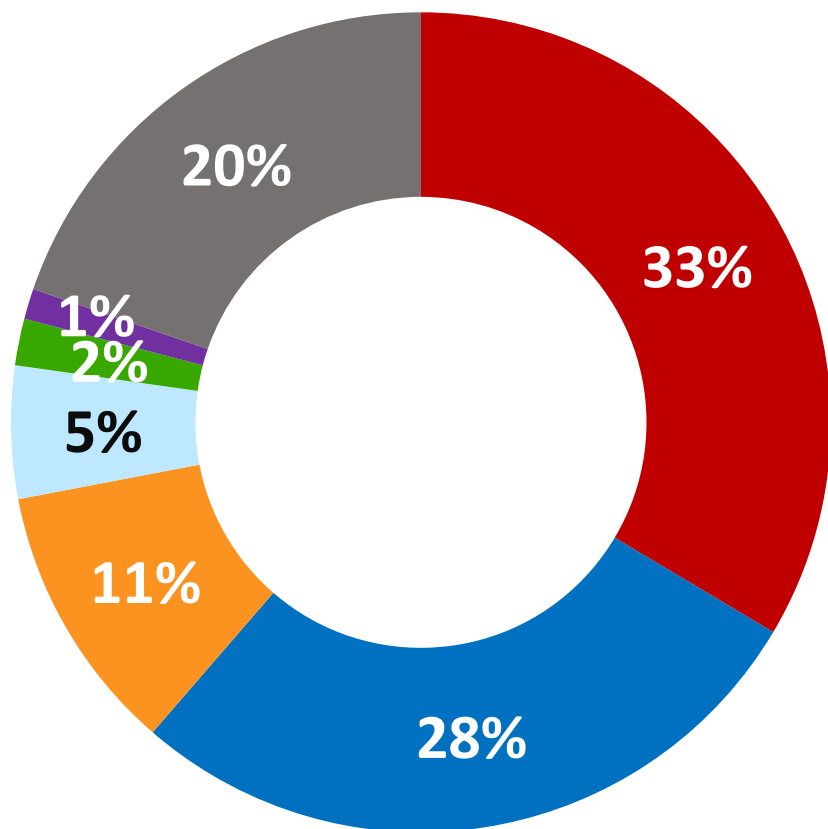
		2025-10 (n=1041)	Usually votes LPC (n=348)	Usually votes CPC (n=291)	Usually votes NDP (n=108)	Left-leaning (n=280)	Right-leaning (n=259)
1 st Rank	Energy	36.9%	33.9%	53.1%	20.1%	24.4%	46.0%
	Minerals and metals	24.8%	28.5%	22.0%	24.7%	23.3%	25.5%
	Agriculture and food	18.6%	19.0%	13.5%	20.4%	24.7%	16.2%
	Forestry	5.9%	5.3%	2.6%	9.2%	7.5%	3.0%
	Vehicles and automotive parts	4.1%	4.7%	4.7%	5.0%	4.7%	5.0%
	Machinery and equipment	2.5%	2.3%	1.8%	4.5%	2.3%	4.5%
	Services	2.9%	3.0%	0.9%	4.2%	3.0%	4.2%
	All of the above	0.1%	-	-	-	-	-
	Unsure	4.2%	3.3%	1.6%	11.9%	3.3%	11.9%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, October 27th and 30th, 2025, n=1041, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Political questions



Federal party usually supported



*Weighted to the true population proportion.

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

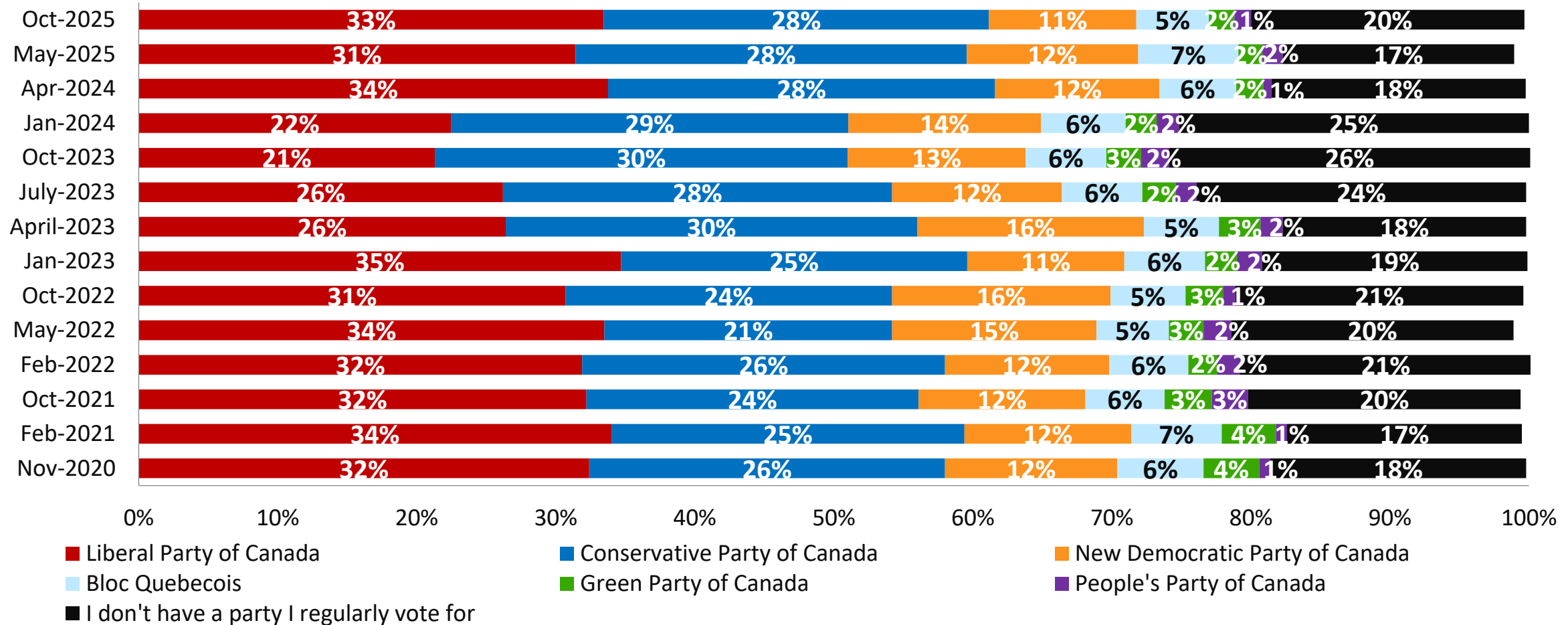
- Liberal Party of Canada
- Conservative Party of Canada
- New Democratic Party of Canada
- Bloc Quebecois
- Green Party of Canada
- People's Party of Canada
- I don't have a party I regularly vote for

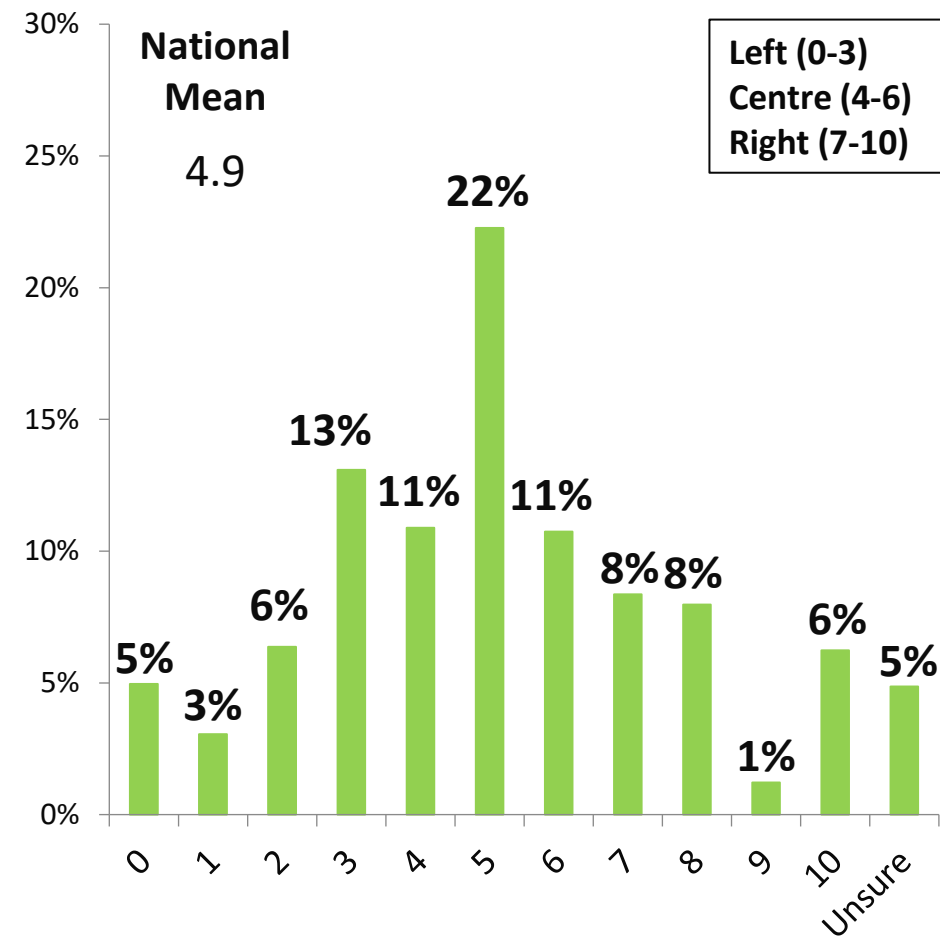
Q - Thinking of federal elections, which federal party do you usually vote for [RANDOMIZE]

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,045, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Federal party usually supported - Tracking

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





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

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?

Political views scale

	Atlantic (n=103)	Quebec (n=245)	Ontario (n=323)	Prairies (n=219)	BC (n=155)
Mean	4.8	4.9	4.8	5.6	4.6
	Men (n=539)	Women (n=506)	18 to 34 (n=188)	35 to 54 (n=335)	55 plus (n=522)
	5.3	4.6	4.7	5.0	5.0

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, between October 27th and 30th, 2025, n=1,045, accurate 3.0 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 1,045 Canadians, 18 years of age or older, between October 27th and 30th, 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 1,045 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 are here:

[By region, age and gender](#)

[By vote and political spectrum](#)

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



Element	Description
Research sponsor	Positive Energy at the University of Ottawa
Population and Final Sample Size	1,045 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	October 27 th to 30 th , 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	12 percent, 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, views on tariffs, the federal budget, grocery affordability, the annual operating deficit, innovation and risk of failure and the fisheries in Canada.
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 vote and political spectrum



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This international joint venture between [dimap](http://www.dimap.com) and [Nanos](http://www.nanos.co) brings together top research and data experts from North American and Europe to deliver exceptional data intelligence to clients. The team offers data intelligence services ranging from demographic and sentiment microtargeting; consumer sentiment identification and decision conversion; and, data analytics and profiling for consumer persuasion. www.nanosdimap.com

EthicStratēgies

Ethic Strategies was created by the founding partners of [PAA Advisory](http://www.paaadvisory.com) and the [Nanos Research Corporation](http://www.nanos.co), 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

Any questions?



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