A slim majority of Canadians and British Columbians would support or somewhat support building a new pipeline from Alberta to BC, even if BC opposes it or if the oil tanker ban is lifted.

THE GLOBE AND MAIL

NANOS

This research gauged the views of Canadians on energy and pipeline related issues in Western Canada, trade negotiations with the United States, and priorities for the Major Projects Office.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,009 Canadians, 18 years of age or older, between November 29th and December 2nd, 2025, as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada. 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 randomly called using random digit dialing with a maximum of five call backs.

The margin of error for this survey is ±3.1 percentage points, 19 times out of 20.

This study was commissioned by the Globe and Mail and the research was conducted by Nanos Research.

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

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

METHODOLOGY

KEY FINDINGS

1

MORE CANADIANS SUPPORT AN OIL PIPELINE BETWEEN ALBERTA AND B.C.'S NORTH COAST AND LIFTING THE BAN ON OIL TANKER TRAFFIC IN BC THAN OPPOSE THE PROJECTS
More than five in ten Canadians support or somewhat support both building a new pipeline from Alberta to BC, even if BC opposes it (56%) and lifting the ban on oil tanker traffic in BC to support a new pipeline (55%), while about a third of Canadians oppose or somewhat oppose each (37% each). Residents of the Prairies are twice as likely to support the new pipeline from Alberta to BC (72%) and the lifting of the ban oil tanker traffic in BC to some extent (73%) compared to residents of Quebec (36% and 35% respectively).

2

OVER TWO IN FIVE CANADIANS WOULD SUPPORT AN OIL PIPELINE BETWEEN ALBERTA AND B.C.'S NORTH COAST REGARDLESS OF WHETHER IT HAS INDIGENOUS CO-OWNERSHIP
A majority of Canadians would support the building of the new pipeline, with two in five Canadians say they would support an oil pipeline regardless of whether it has Indigenous co-ownership (43%) and three in ten who would support an oil pipeline only if there is Indigenous co-ownership (29%). Less than one in five would never support an oil pipeline and it doesn't matter if there is Indigenous co-ownership (19%). Of note, residents of Quebec (31%) and B.C. (29%) are more likely to say they would never support an oil pipeline than residents of the Atlantic (18%), the Prairies (13%) and Ontario (11%).

3

OVER THREE IN FIVE CANADIANS SAY IT IS IMPORTANT FOR CANADA TO INCREASE ITS OIL AND GAS EXPORTS
When asked how important they think it is for Canada to increase oil and gas exports amid ongoing trade negotiations with the United States, over three in five rated it as important (score of 7 to 10 out of 10) (62%). Less than one in five rated this as not important (score of 0 to 3 out of 10) (15%). Of note, residents of Quebec were less likely to rate this as important than residents of all other provinces (mean score of 5.9). Women (mean score of 6.7) were also less likely to rate this as important than men (mean score of 7.6), as were Canadians aged 18 to 34 (mean score of 6.6) compared to those age 35 to 54 (mean score of 7.4) and over 55 (mean score of 7.3).

4

CANADIANS MOST LIKELY TO PRIORITIZE GREEN ENERGY SUCH AS SOLAR PANELS/WIND FOR THE NEW "MAJOR PROJECTS OFFICE"
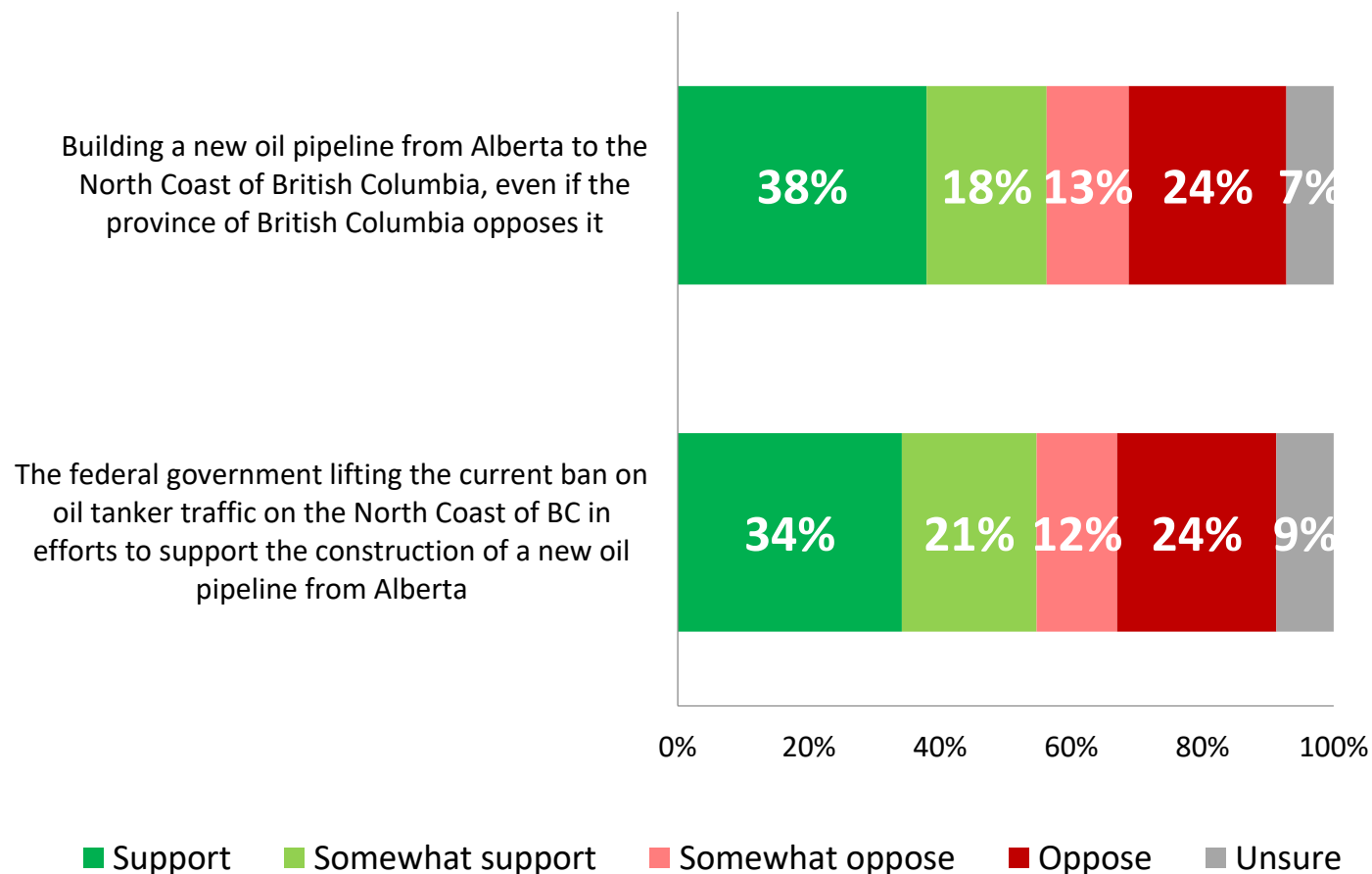When asked what types of projects should the federal government prioritize in terms of large infrastructure projects, nearly one in four Canadians said green energy should be the first priority (23%), followed by electricity transmission and grid upgrades (16%) and oil pipelines (16%). Of note, women (29%) were more likely to prioritize green energy than men (16%).

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A slim majority of Canadians support or somewhat support building a new pipeline from Alberta to BC, even if BC opposes it (38% support; 18% somewhat support) and lifting the ban on oil tanker traffic in BC to support a new pipeline (34% support; 21% somewhat support).

Residents of the Prairies are twice as likely to support the new oil pipeline from Alberta to BC (72%) and the lifting of the ban oil tanker traffic in BC to some extent (73%) as residents of Quebec (36% and 35%, respectively).

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

Levels of support for various statements regarding oil pipelines in Western Canada

Building a new oil pipeline from Alberta to the North Coast of British Columbia, even if the province of British Columbia opposes it

| 38% | 18% | 13% | 24% | 7% |

The federal government lifting the current ban on oil tanker traffic on the North Coast of BC in efforts to support the construction of a new oil pipeline from Alberta

| 34% | 21% | 12% | 24% | 9% |

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

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

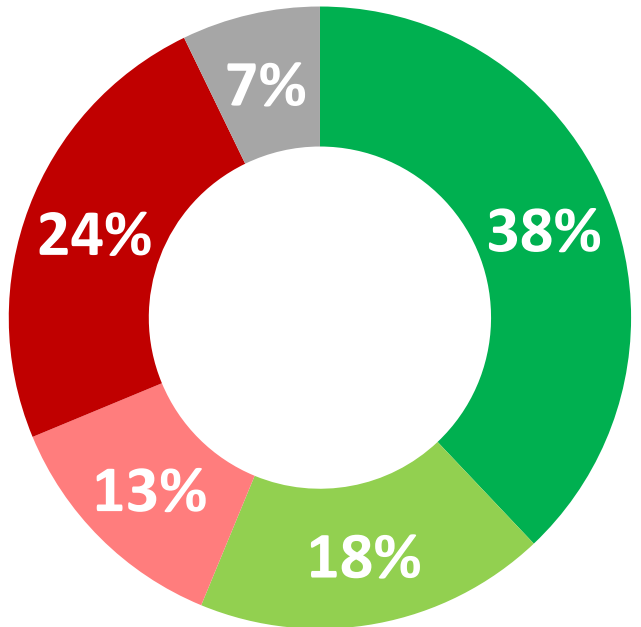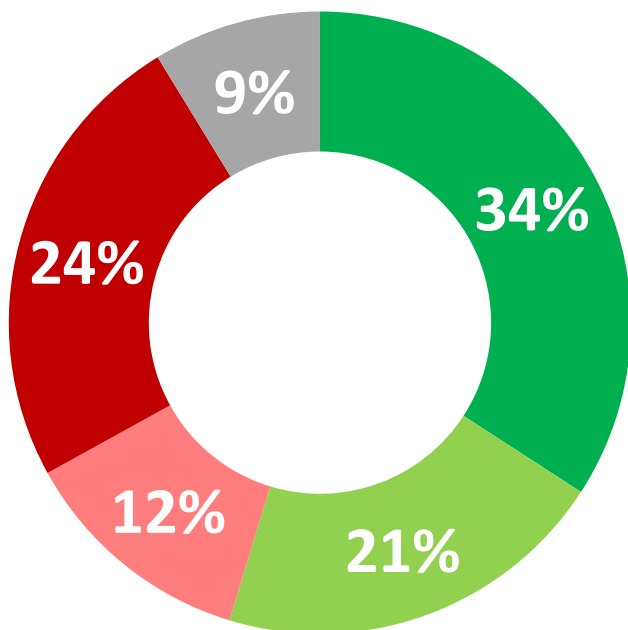*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 29th to December 2nd, 2025 , n=1009, accurate 3.1 percentage points plus or minus, 19 times out of 20.

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Views on building a new oil pipeline from Alberta to BC, even if BC opposes it

38% Support

18% Somewhat support

13% Somewhat oppose

24% Oppose

7% Unsure

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

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

Support/Somewhat support	Atlantic (n=106)	Quebec (n=208)	Ontario (n=343)	Prairies (n=205)	BC (n=147)
	59.0%	36.1%	60.1%	72.2%	57.4%
	Men (n=584)	Women (n=425)	18 to 34 (n=186)	35 to 54 (n=346)	55 plus (n=477)
	67.8%	45.1%	51.1%	59.3%	57.2%

Oppose/Somewhat oppose	Atlantic (n=106)	Quebec (n=208)	Ontario (n=343)	Prairies (n=205)	BC (n=147)
	34.1%	51.4%	31.5%	26.4%	40.0%
	Men (n=584)	Women (n=425)	18 to 34 (n=186)	35 to 54 (n=346)	55 plus (n=477)
	29.3%	43.6%	38.7%	33.8%	37.3%

Q – Do you support, somewhat support, somewhat oppose or oppose the following : [RANDOMIZE]
Building a new oil pipeline from Alberta to the North Coast of British Columbia, even if the province of British Columbia opposes it

THE GLOBE AND MAIL*   n NANOS

Views on lifting the ban on oil tanker traffic in BC to support a new pipeline

34%

9%

24%

12%

21%

- 🟩 Support
- 🟩 Somewhat support
- 🟥 Somewhat oppose
- 🟥 Oppose
- ⬜ Unsure

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

Support/Somewhat support	Atlantic (n=106)	Quebec (n=208)	Ontario (n=343)	Prairies (n=205)	BC (n=147)
	56.6%	35.0%	58.8%	73.0%	52.1%
	Men (n=584)	Women (n=425)	18 to 34 (n=186)	35 to 54 (n=346)	55 plus (n=477)
	66.8%	43.1%	47.6%	56.2%	58.1%

Oppose/Somewhat oppose	Atlantic (n=106)	Quebec (n=208)	Ontario (n=343)	Prairies (n=205)	BC (n=147)
	36.1%	51.5%	31.1%	23.4%	43.9%
	Men (n=584)	Women (n=425)	18 to 34 (n=186)	35 to 54 (n=346)	55 plus (n=477)
	29.8%	43.0%	39.6%	33.9%	36.7%

Q – Do you support, somewhat support, somewhat oppose or oppose the following : [RANDOMIZE]
The federal government lifting the current ban on oil tanker traffic on the North Coast of BC in efforts to support the construction of a new oil pipeline from Alberta
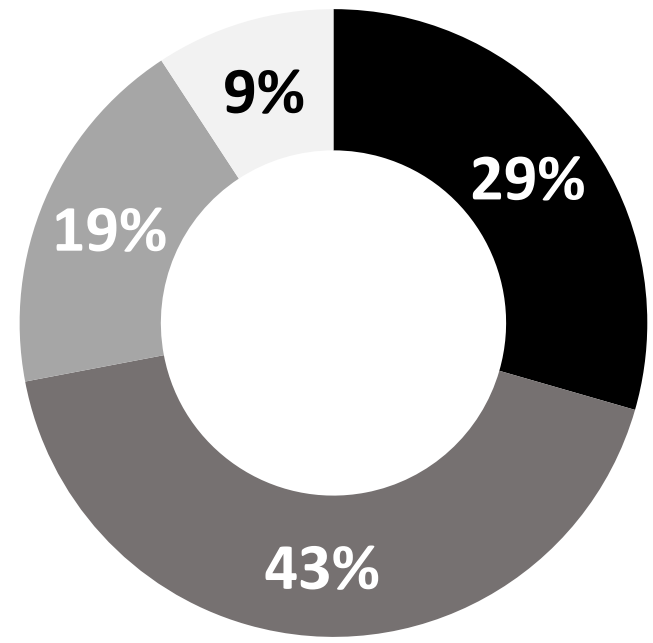
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 29th to December 2nd, 2025, n=1009, accurate 3.1 percentage points plus or minus, 19 times out of 20.

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Level of support for potential pipeline based on Indigenous co-ownership

I would support an oil pipeline regardless of whether it has Indigenous co-ownership

	Atlantic (n=106)	Quebec (n=208)	Ontario (n=343)	Prairies (n=205)	BC (n=147)
	48.3%	25.6%	40.9%	62.3%	47.7%
	Men (n=584)	Women (n=425)	18 to 34 (n=186)	35 to 54 (n=346)	55 plus (n=477)
	53.7%	31.9%	38.1%	45.9%	42.8%

I would support a pipeline only if there is Indigenous co-ownership

	Atlantic (n=106)	Quebec (n=208)	Ontario (n=343)	Prairies (n=205)	BC (n=147)
	23.1%	29.2%	38.4%	22.9%	16.5%
	Men (n=584)	Women (n=425)	18 to 34 (n=186)	35 to 54 (n=346)	55 plus (n=477)
	24.2%	34.5%	27.0%	29.3%	31.2%

- 29% ■ I would support a pipeline only if there is Indigenous co-ownership
- 43% ■ I would support a pipeline regardless of whether it has Indigenous co-ownership
- 19% ■ I would never support a pipeline and it doesn't matter if there is Indigenous co-ownership
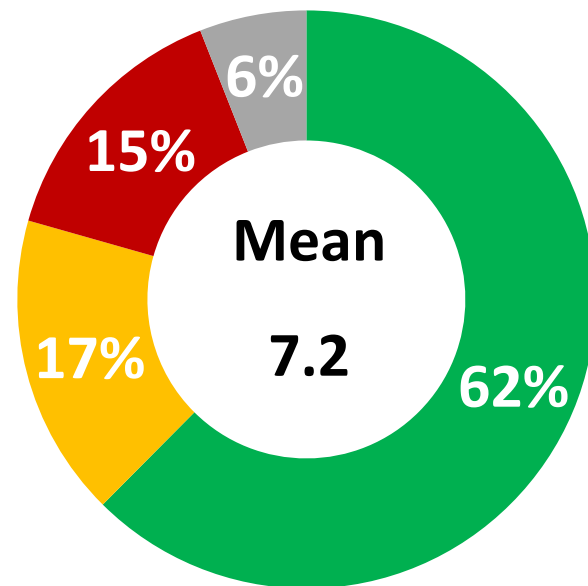- 9% □ Unsure

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

Q – A recent agreement between the federal and Alberta governments says a potential pipeline between Alberta and B.C.'s north coast should have Indigenous co-ownership and should benefit Indigenous Peoples. Which of the following do you most agree with? [RANDOMIZE]

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 29th to December 2nd, 2025, n=1009, accurate 3.1 percentage points plus or minus, 19 times out of 20.

THE GLOBE AND MAIL*   **NANOS**

Level of importance of increasing oil and gas exports amid Canada-US trade negotiations

Q – On a scale from 0 to 10 where 0 is not important at all and 10 is very important, how important do you think it is to increase oil and gas exports amid ongoing trade negotiations with the United States?

Mean
7.2

62%

17%

15%

6%

Mean	Atlantic (n=106)	Quebec (n=208)	Ontario (n=343)	Prairies (n=205)	BC (n=147)
	7.6	5.9	7.6	7.7	7.3
	Men (n=584)	Women (n=425)	18 to 34 (n=186)	35 to 54 (n=346)	55 plus (n=477)
	7.6	6.7	6.6	7.4	7.3

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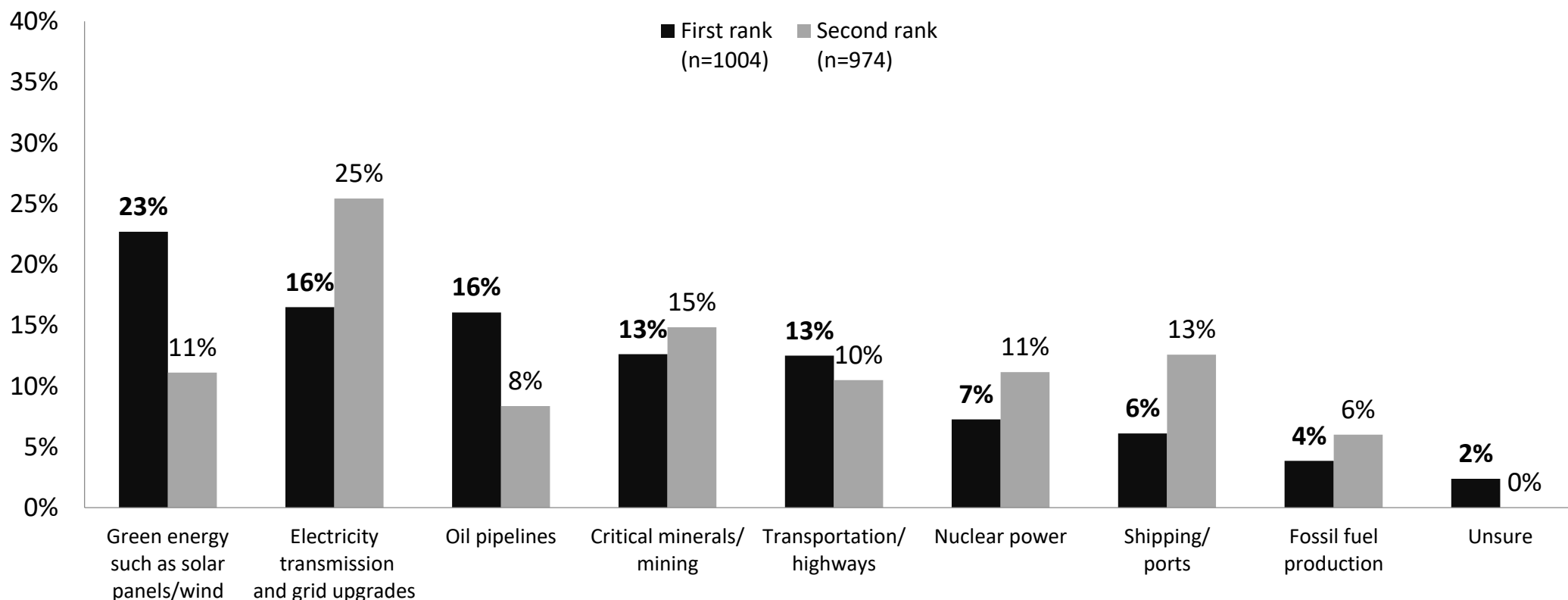- ■ Not important (0-3)
- ■ Unsure

*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, November 29th to December 2nd, 2025, n=1009, accurate 3.1 percentage points plus or minus, 19 times out of 20.

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Priorities for the Major Projects Office

Q – The federal government has created a Major Projects Office to handle large infrastructure projects and has promised to speed up approvals for projects considered in the "national interest." What types of projects should the federal government prioritize? Please rank the potential types of projects in order of priority where 1 is the projects the government should first prioritize, 2 is the project that should receive 2nd priority and so on. [RANDOMIZE]

Legend:
- First rank (n=1004) — black
- Second rank (n=974) — grey

Category	First rank	Second rank
Green energy such as solar panels/wind	23%	11%
Electricity transmission and grid upgrades	16%	25%
Oil pipelines	16%	8%
Critical minerals/ mining	13%	15%
Transportation/ highways	13%	10%
Nuclear power	7%	11%
Shipping/ ports	6%	13%
Fossil fuel production	4%	6%
Unsure	2%	0%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 29th to December 2nd, 2025, n=1004, accurate 3.1 percentage points plus or minus, 19 times out of 20.

THE GLOBE AND MAIL*

NANOS

Priorities for the Major Projects Office – First ranked – By demographics

Q – The federal government has created a Major Projects Office to handle large infrastructure projects and has promised to speed up approvals for projects considered in the "national interest." What types of projects should the federal government prioritize? Please rank the potential types of projects in order of priority where 1 is the projects the government should first prioritize, 2 is the project that should receive 2nd priority and so on. [RANDOMIZE] [RANK 1]

		2025-11 (n=1004)	Atlantic (n=106)	Quebec (n=207)	Ontario (n=340)	Prairies (n=204)	BC (n=147)	Men (n=582)	Women (n=422)	18-34 (n=186)	35-54 (n=346)	55 plus (n=472)
F I R S T R A N K E D	Green energy such as solar panels/wind	22.7%	23.7%	30.8%	21.5%	14.3%	22.7%	16.0%	29.2%	26.1%	17.6%	24.5%
	Electricity transmission and grid upgrades	16.5%	27.9%	23.1%	14.9%	14.4%	7.2%	15.3%	17.7%	8.4%	20.1%	18.9%
	Oil pipelines	16.1%	12.3%	8.2%	14.3%	31.5%	16.5%	17.3%	14.9%	9.4%	19.0%	18.2%
	Critical minerals/mining	12.6%	8.9%	13.5%	11.6%	12.0%	16.6%	17.0%	8.4%	11.5%	14.5%	11.9%
	Transportation/highways	12.5%	8.7%	12.9%	15.3%	7.4%	12.3%	10.3%	14.6%	21.3%	9.6%	9.0%
	Nuclear power	7.3%	8.4%	2.1%	11.1%	5.1%	7.2%	10.7%	4.0%	14.3%	4.7%	4.7%
	Shipping/ports	6.1%	4.2%	5.0%	5.3%	6.4%	10.6%	7.0%	5.3%	3.3%	7.3%	7.1%
	Fossil fuel production	3.9%	5.9%	1.5%	4.0%	5.4%	4.4%	5.4%	2.4%	3.6%	4.6%	3.4%
	Unsure	2.4%	-	3.0%	2.0%	3.5%	2.4%	1.2%	3.5%	2.2%	2.7%	2.3%

THE GLOBE AND MAIL* NANOS

Element	Description
Research sponsor	The Globe and Mail
Population and Final Sample Size	1,009 Randomly selected individuals.
Source of Sample	Nanos Insights Lab
Type of Sample	Probability
Margin of Error	±3.1 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	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online
Number of Calls	Maximum of five call backs to those recruited.
Time of Calls	Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.
Field Dates	November 29th to December 2nd, 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	11 percent, consistent with industry norms.
Question Order	Question order in the preceding 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 Artificial Intelligence, views on the federal budget and personal finances, views on buying Canadian goods for the holiday season, views on financial concerns and views on defence cooperation and the procurement of fighter jets.
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.
Tabulations	By region, age and gender

TECHNICAL NOTE

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ABOUT NANOS

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