COVID-19 puts Canadians at the fulcrum of environment and economy

June Omni | Summary

Conducted by Nanos for Positive Energy, July 2020
Submission 2020-1615

POSITIVE ENERGY

CANADA'S ENERGY FUTURE IN AN AGE OF CLIMATE CHANGE

NANOS

Despite the economic slowdown caused by the COVID pandemic, Canadians are more likely to say that now is the best time rather than the worst to be ambitious about climate change, reasoning that climate change cannot wait and that there is an opportunity for an environmentally focused economic reboot.

At the same time, Canadians appear to be keenly sensitive to the potential trade-offs, with a significant decline in the number of people who support environmental action at the cost of the economy.

The complexity of opinion is emerging due to the unique moment that is forcing Canadians to balance two competing urgent crises, environmental and economic.

Nik Nanos,

Chief Data Scientist

Major opinion shifts in the tracking study

POSITIVE ENERGY NANOS

Canadians are more likely to say this is the best rather than the worst time to be ambitious about climate change

Forty-five per cent of Canadians say now is the best time to be ambitious in addressing climate change even if there are costs to the economy, while 29 per cent say it is the worst time.

The number of Canadians who think protecting the environment at the expense of jobs and economic growth has dropped compared to previous waves

In July 2020, 49% of Canadians agree that protecting the environment should be the priority over economic growth and jobs (39% say growth and jobs should be the priority) compared to 61% in August 2019 (29% said growth and jobs should be the priority).

Canadian support for growth in the oil and gas and the renewable sectors remains comparable to 2019

Twenty-nine per cent of Canadians (29% in 2019) support and 23% (26% in 2019) somewhat support growth in the oil and gas sector, while 72% (76% in 2019) support and 21% (19% in 2019) somewhat support growth in the renewable energy sector.

Compared to 2015, fewer Canadians say it would be possible or somewhat possible for them to be more supportive of the development of fossil fuel resources

In 2020, just under six in ten Canadians say it is possible (26%) and somewhat possible (32%) for them to be more supportive of the development of fossil fuel energy resources like oil, gas and coal if Canada had a more environmentally proactive climate change policy compared to just under eight in ten in 2015 (35% possible, 42% somewhat possible).

SUMMARY

More Canadians say now is a good rather than a bad time to be ambitious in addressing climate change

Canadians are more likely to say that now is the best time to be ambitious about addressing climate change than to say that it is the worst time. In 2020, there has been a drop in the number of people who support protecting the environment at the expense of the economy. However, support for growth in the oil and gas sector and the renewable energy sector holds steady compared to previous waves.

- **Canadians are more likely to say now is the best time rather than the worst time to be ambitious in addressing climate change** – Asked to rate 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, 45 per cent of Canadians say now is the best time (7 to 10 out of 10) while 29 per cent say it is the worst time (0 to 3 out of 10). Twenty-three per cent of Canadians selected middle range scores (4 to 6 out of 10) with respect to being ambitious and three per cent are unsure. Canadians in the Prairies (mean score of 3.9 out of 10) are less likely to say this is a good time to be ambitious about the environment than Quebec (mean score of 6.6 out of 10).
- **Most frequently Canadians who say now is a good time to address climate change say that climate change cannot wait** – Canadians who think now is the best time to address climate change most frequently say that action is needed now because climate change cannot wait (39%) and that the pandemic offers a good opportunity for change and highlights our impact on the environment (38%). Those that think now is the worst time say we should wait until the economy has recovered from the effects of the pandemic (47%) and that there are currently other priorities (22%).
- **Canadians more frequently say protecting the environment should be given priority over jobs** – Almost one in two (49%) Canadians say they agree that protecting the environment should be given priority, even if it causes slower economic growth and some loss of jobs, while 39 per cent say growth and creating jobs should be the top priority, even if the environment suffers to some extent. Twelve per cent are unsure. Younger Canadians (58% of those 18 to 34) are more likely to agree with prioritizing the environment, while Canadians from the Prairies (55%) are more likely to prioritize growth and jobs.

SUMMARY

POSITIVE ENERGY NANOS

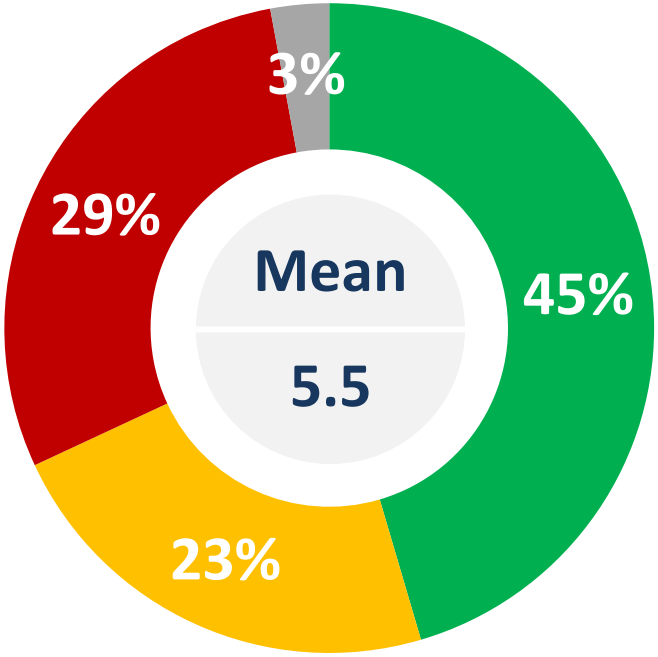
Just under six in ten Canadians say it is possible or somewhat possible for them to be supportive of fossil fuel energy if Canada has more proactive climate policy

- **Canadians are split when it comes to support for growth in the oil and gas sector in Canada** – Just over half of Canadians support (29%) or somewhat support (23%) growth in the oil and gas sector in Canada, while just under half somewhat oppose (24%) or oppose (20%) this. Four per cent are unsure. Canadians from the Prairies are more likely to support such growth (49%) and Canadians from Quebec are less likely to support (13%).
- **Over four in five Canadians say they support or somewhat support growth in the renewable energy sector in Canada** – A significant majority of Canadians support (72%) or somewhat support (21%) growth in the renewable energy sector in Canada, while two per cent oppose and three per cent somewhat oppose this. Two per cent are unsure. Canadians from the Atlantic (86%) are more likely to support this, while those from the Prairies (64%) are less likely to say they support such growth.
- **Almost two in three Canadians say that the federal government should lead decision making for reducing greenhouse gas emissions** – Sixty-four per cent of Canadians say that the federal government should lead decision making for reducing greenhouse gas emissions, while 26 per cent say the provincial government should. Ten per cent are unsure. Canadians in the Prairies are more likely to say that the provincial government should take the lead (42%; compared to 26% of Canadians overall).
- **Canadians more frequently say it is possible for them to be more supportive of fossil fuel energy if Canada has more proactive climate policy than to say it is not possible** – Nearly six in ten Canadians say it is possible (26%) or somewhat possible (32%) for them to be more supportive of the development of fossil fuel energy resources like oil, gas and coal if Canada had a more environmentally proactive climate change policy, while 17 per cent say this is somewhat not possible and 15 per cent say not possible. Ten per cent are unsure. Canadians in the Prairies are more likely to say this is possible (39%) and those from Quebec are less likely to say the same (15%).

These observations are based on an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,049 Canadians, 18 years of age or older, between June 28th and July 2nd, 2020 as part of an omnibus survey. The margin of error for this survey is ±3.1 percentage points, 19 times out of 20.

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

Good time for Canada to be ambitious in addressing climate change



■ Best time (7-10) ■ Middle range scores (4-6) ■ Worst time (0-3) ■ Unsure

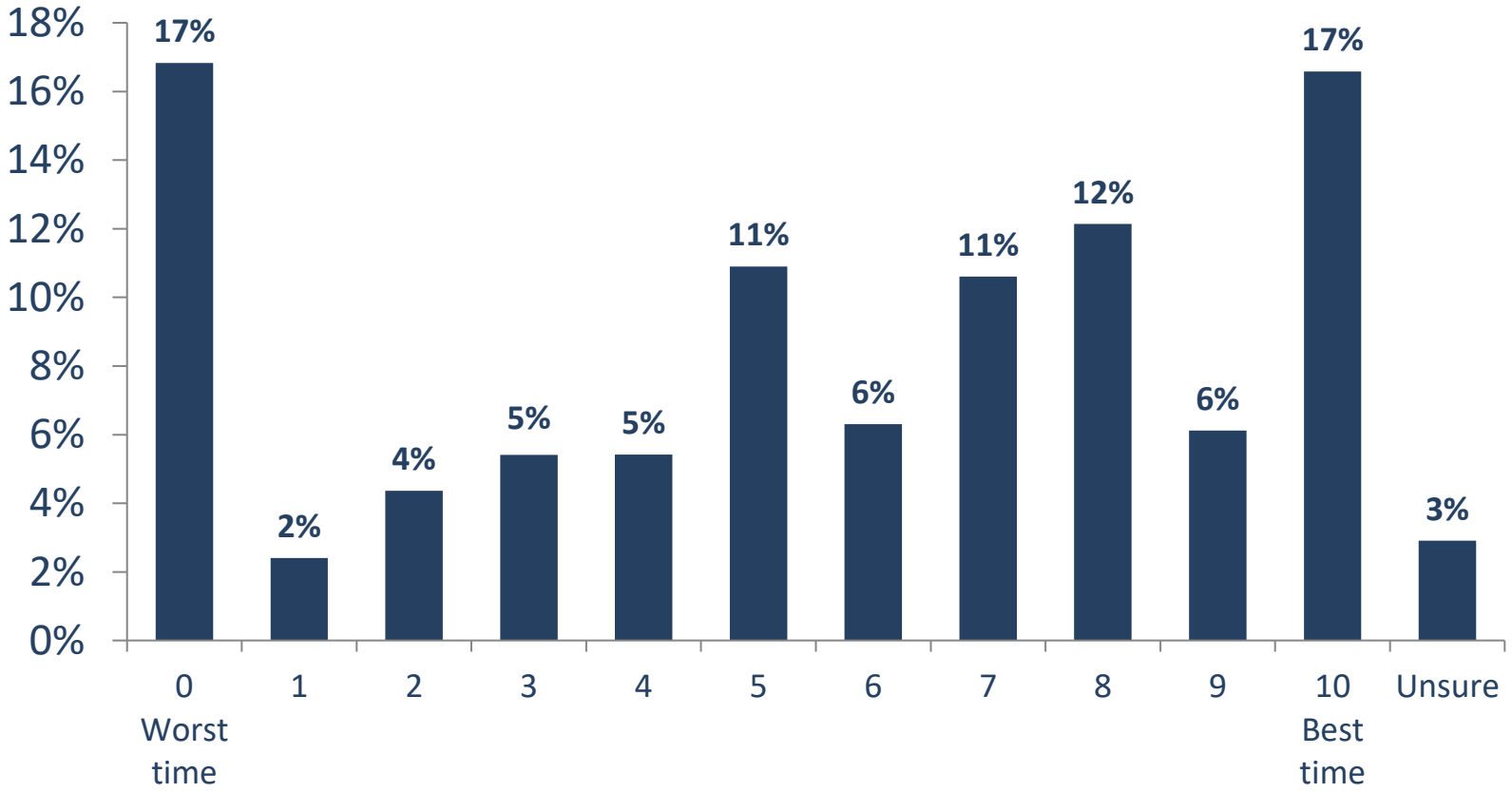
	Mean
Atlantic (n=100)	6.1
Quebec (n=252)	6.6
Ontario (n=339)	5.5
Prairies (n=203)	3.9
British Columbia (n=155)	5.7
Male (n=555)	5.2
Female (n=494)	5.8
18 to 34 (n=270)	5.9
35 to 54 (n=393)	5.2
55 plus (n=386)	5.5

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

QUESTION – 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, June 28th to July 2nd, 2020, n=1049 accurate 3.1 percentage points plus or minus, 19 times out of 20.

Good time for Canada to be ambitious in addressing climate change



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QUESTION – 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, June 28th to July 2nd, 2020, n=1049 accurate 3.1 percentage points plus or minus, 19 times out of 20.

Good time for Canada to be ambitious in addressing climate change - Region

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Region	0	1	2	3	4	5	6	7	8	9	10	Unsure
Atlantic (n=100)	7.2%	4.6%	3.9%	4.3%	3.6%	16.5%	7.1%	9.0%	14.0%	8.1%	17.6%	4.2%
Quebec (n=252)	4.8%	1.8%	3.3%	4.9%	5.1%	14.3%	7.8%	11.7%	15.2%	6.6%	20.5%	4.1%
Ontario (n=339)	16.5%	2.2%	3.9%	7.6%	6.3%	9.3%	6.1%	10.2%	12.5%	6.4%	16.4%	2.5%
Prairies (n=203)	36.6%	2.7%	6.9%	3.9%	4.8%	8.3%	5.3%	8.9%	4.8%	5.9%	10.8%	1.2%
British Columbia (n=155)	16.5%	2.5%	4.5%	2.6%	5.3%	10.5%	5.1%	13.1%	15.0%	3.8%	17.7%	3.7%

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

QUESTION – 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?

Good time for Canada to be ambitious in addressing climate change – Gender/Age

POSITIVE ENERGY NANOS

Gender	0	1	2	3	4	5	6	7	8	9	10	Unsure
Male (n=555)	21.2%	3.0%	4.4%	5.8%	4.3%	10.6%	6.4%	9.8%	11.7%	5.1%	16.2%	1.7%
Female (n=494)	12.7%	1.9%	4.3%	5.0%	6.5%	11.2%	6.2%	11.4%	12.6%	7.1%	17.0%	4.1%

Age	0	1	2	3	4	5	6	7	8	9	10	Unsure
18 to 34 (n=270)	15.1%	1.4%	3.1%	5.2%	5.8%	9.4%	5.8%	12.8%	13.0%	5.4%	20.2%	2.7%
35 to 54 (n=393)	21.0%	2.4%	6.7%	3.6%	4.0%	10.2%	6.7%	7.5%	10.8%	7.2%	17.2%	2.8%
55 plus (n=386)	14.3%	3.1%	3.2%	7.2%	6.4%	12.6%	6.3%	11.8%	12.7%	5.7%	13.5%	3.2%

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

QUESTION – 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?

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

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	Total (n=920)	Best time (7-10) (n=427)	Average (4-6) (n=202)	Worst time (0-3) (n=275)
We need to act now, climate change can't wait	20.9%	39.3%	11.9%	-
We should wait until the economy has recovered from the effects of the pandemic	20.8%	0.5%	28.7%	47.3%
The pandemic offers a good opportunity for change and highlights the extent of our potential impact	20.5%	37.7%	10.4%	1.5%
There are other priorities/Focus should be on health/vaccine	12.6%	2.8%	21.3%	21.8%
Diversifying into alternative energy sources and more environmentally friendly solutions could help the economy and create new jobs	7.1%	13.6%	3.5%	-
I do not believe climate change is real or caused by humans	4.7%	0.2%	3.1%	13.2%
Canada's impact on climate change is minimal	2.1%	0.6%	0.4%	5.7%
Both the economy and the environment need to be taken into consideration	3.7%	2.1%	10.4%	1.5%
Uncertain times/we should wait to see how the pandemic goes	1.4%	0.2%	3.5%	1.8%
Other	5.1%	3.0%	5.4%	6.9%
Unsure	1.1%	-	1.5%	-

QUESTION – Why do you say so? [OPEN]

Economic growth vs. environment

POSITIVE ENERGY

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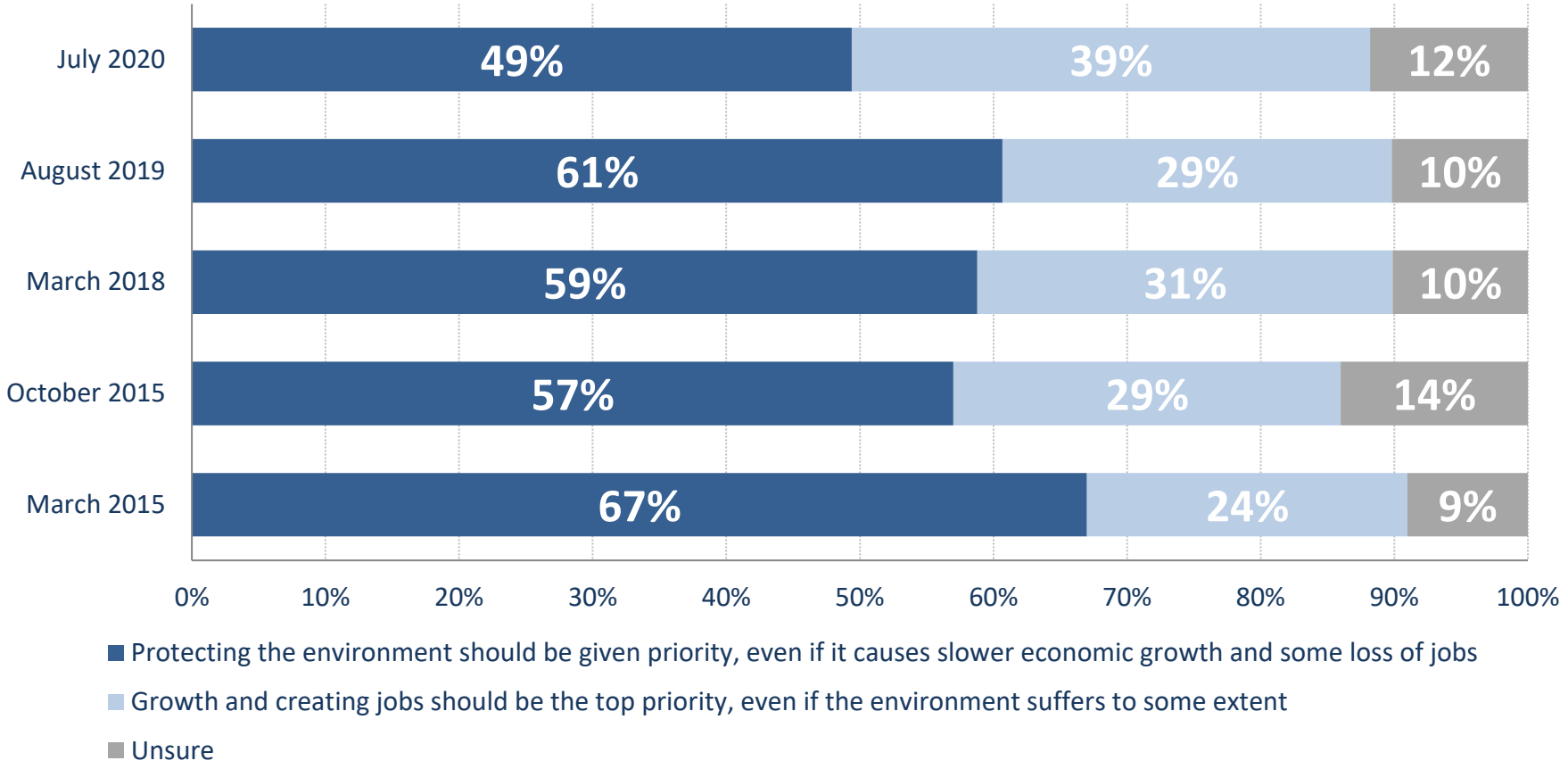
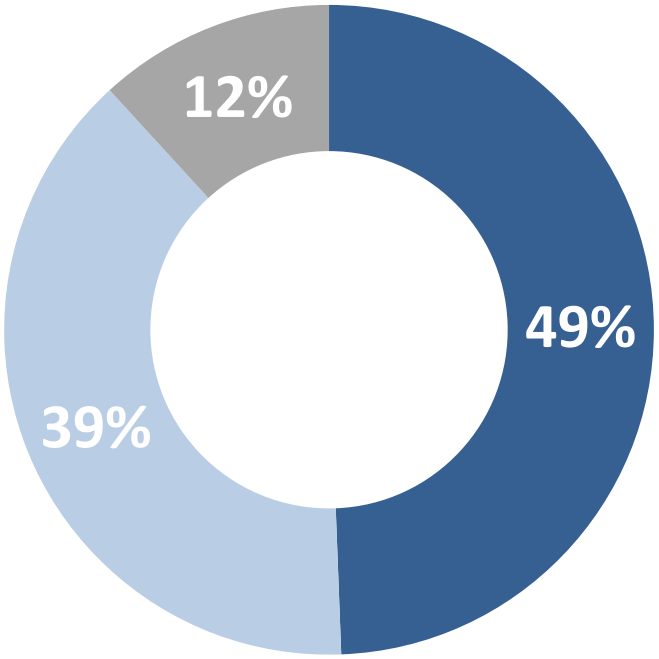


***Charts may not add up to 100 due to rounding**

QUESTION – 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, June 28th to July 2nd, 2020, n=1049 accurate 3.1 percentage points plus or minus, 19 times out of 20.

Economic growth vs. environment



	Protecting the environment
Atlantic (n=100)	51.5%
Quebec (n=252)	54.2%
Ontario (n=339)	50.5%
Prairies (n=203)	33.4%
British Columbia (n=155)	58.7%
Male (n=555)	46.7%
Female (n=494)	52.0%
18 to 34 (n=270)	57.8%
35 to 54 (n=393)	46.3%
55 plus (n=386)	46.2%

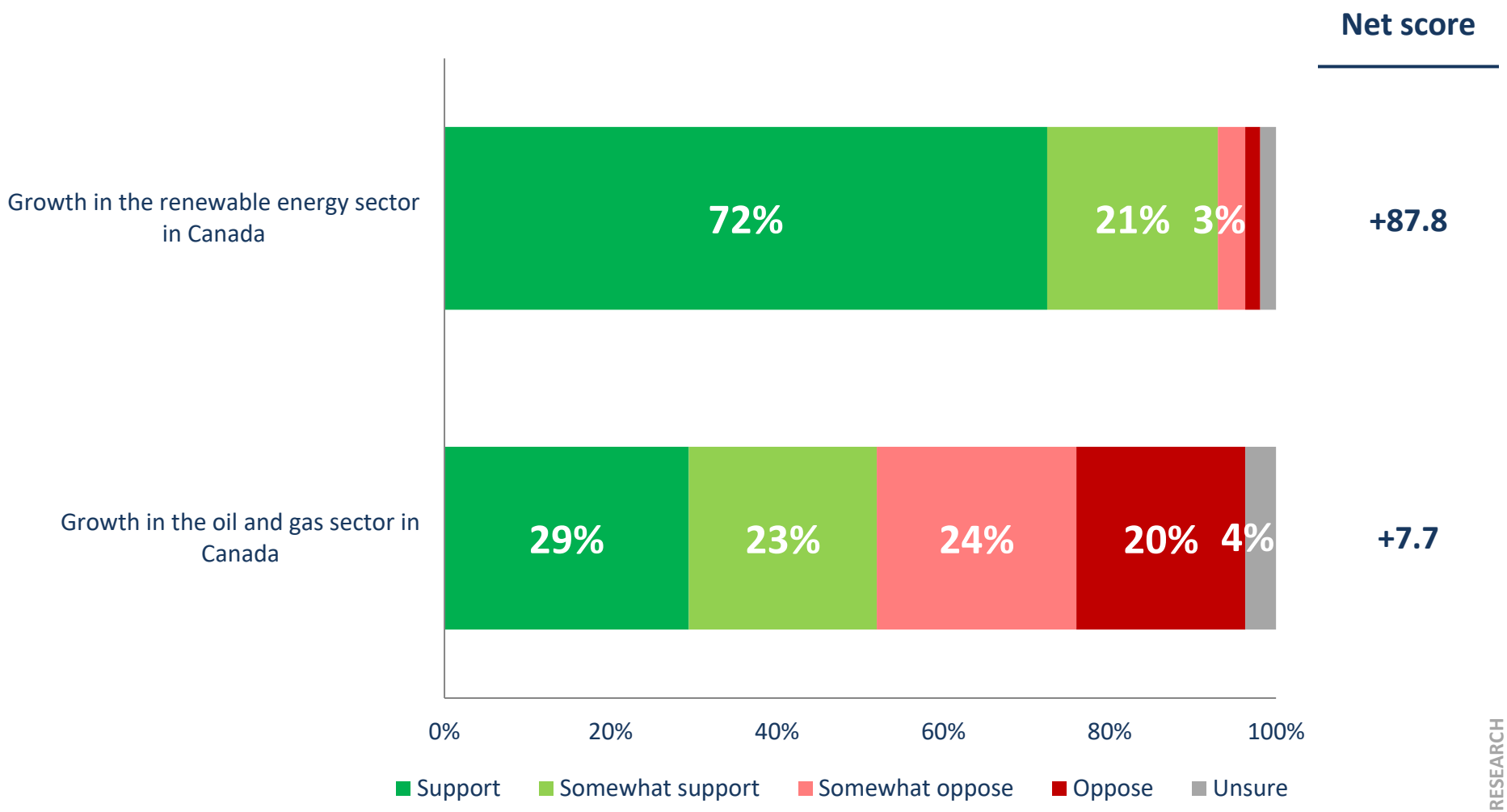
*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

QUESTION – 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, June 28th to July 2nd, 2020, n=1049 accurate 3.1 percentage points plus or minus, 19 times out of 20.

Support for actions related to energy in Canada

POSITIVE ENERGY NANOS

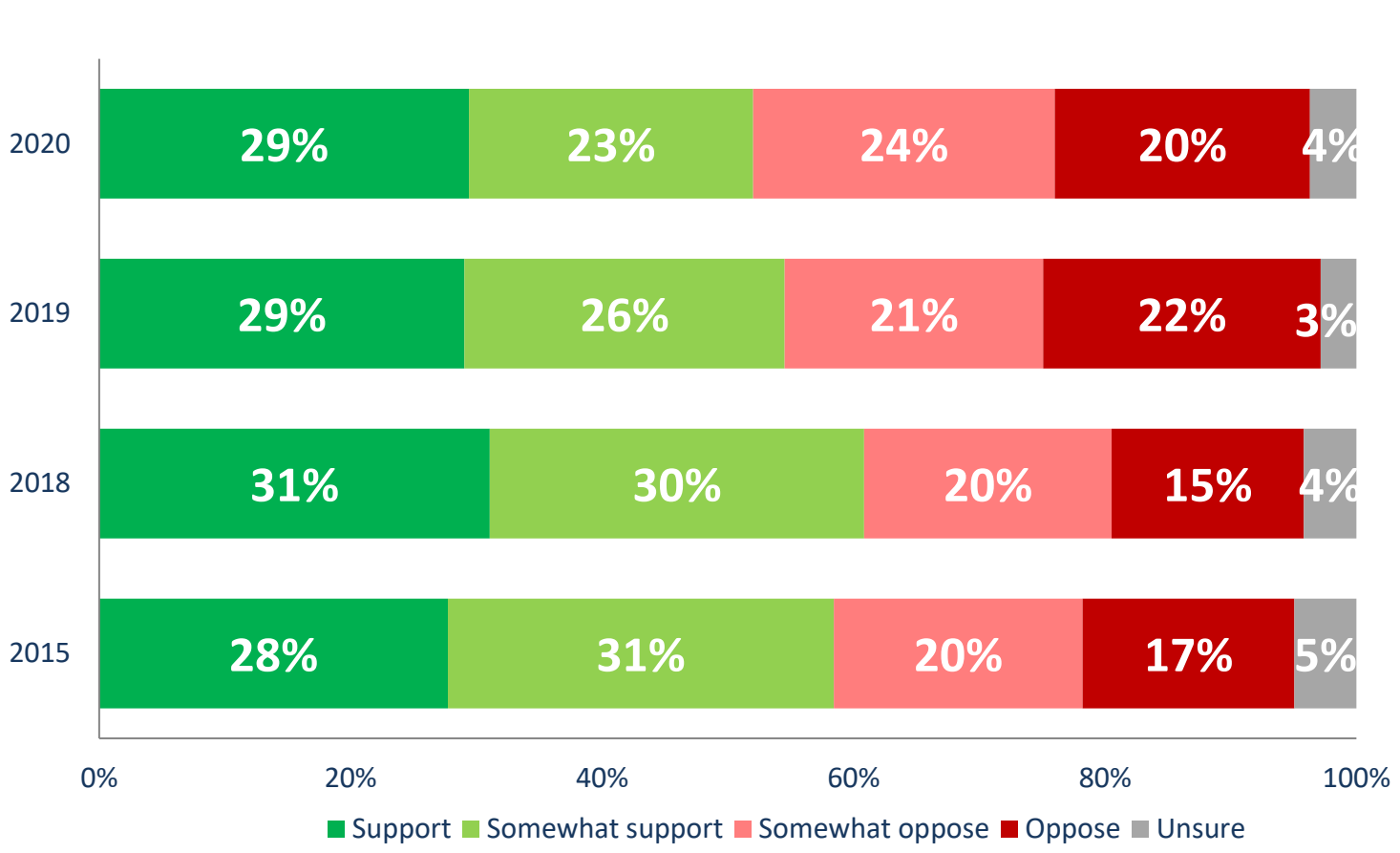


***Charts may not add up to 100 due to rounding**

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following? [RANDOMIZE]

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 28th to July 2nd, 2020, n=1049 accurate 3.1 percentage points plus or minus, 19 times out of 20.

Growth of oil and gas sector



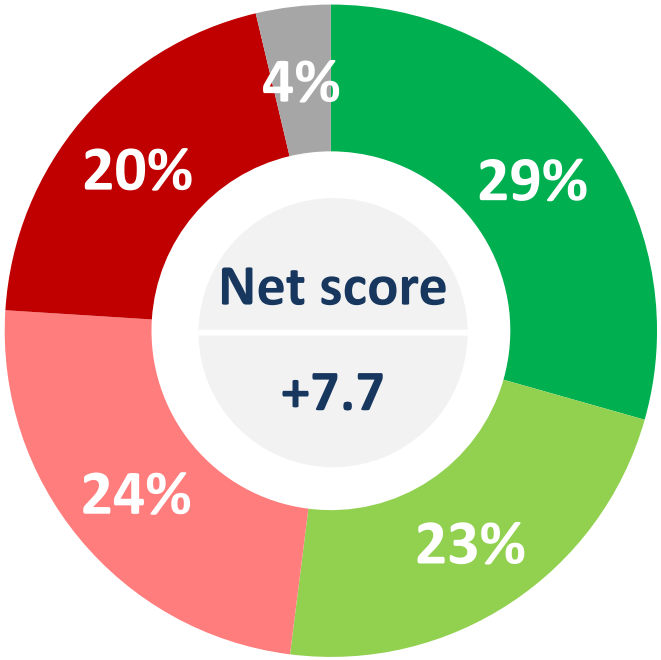
***Charts may not add up to 100 due to rounding**

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following? [RANDOMIZE]

Growth in the oil and gas sector in Canada

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 28th to July 2nd, 2020, n=1049 accurate 3.1 percentage points plus or minus, 19 times out of 20.

Growth of oil and gas sector



	Support/ somewhat support
Atlantic (n=100)	52.2%
Quebec (n=252)	33.5%
Ontario (n=339)	54.3%
Prairies (n=203)	74.7%
British Columbia (n=155)	46.8%
Male (n=555)	60.1%
Female (n=494)	44.3%
18 to 34 (n=270)	43.4%
35 to 54 (n=393)	56.1%
55 plus (n=386)	54.7%

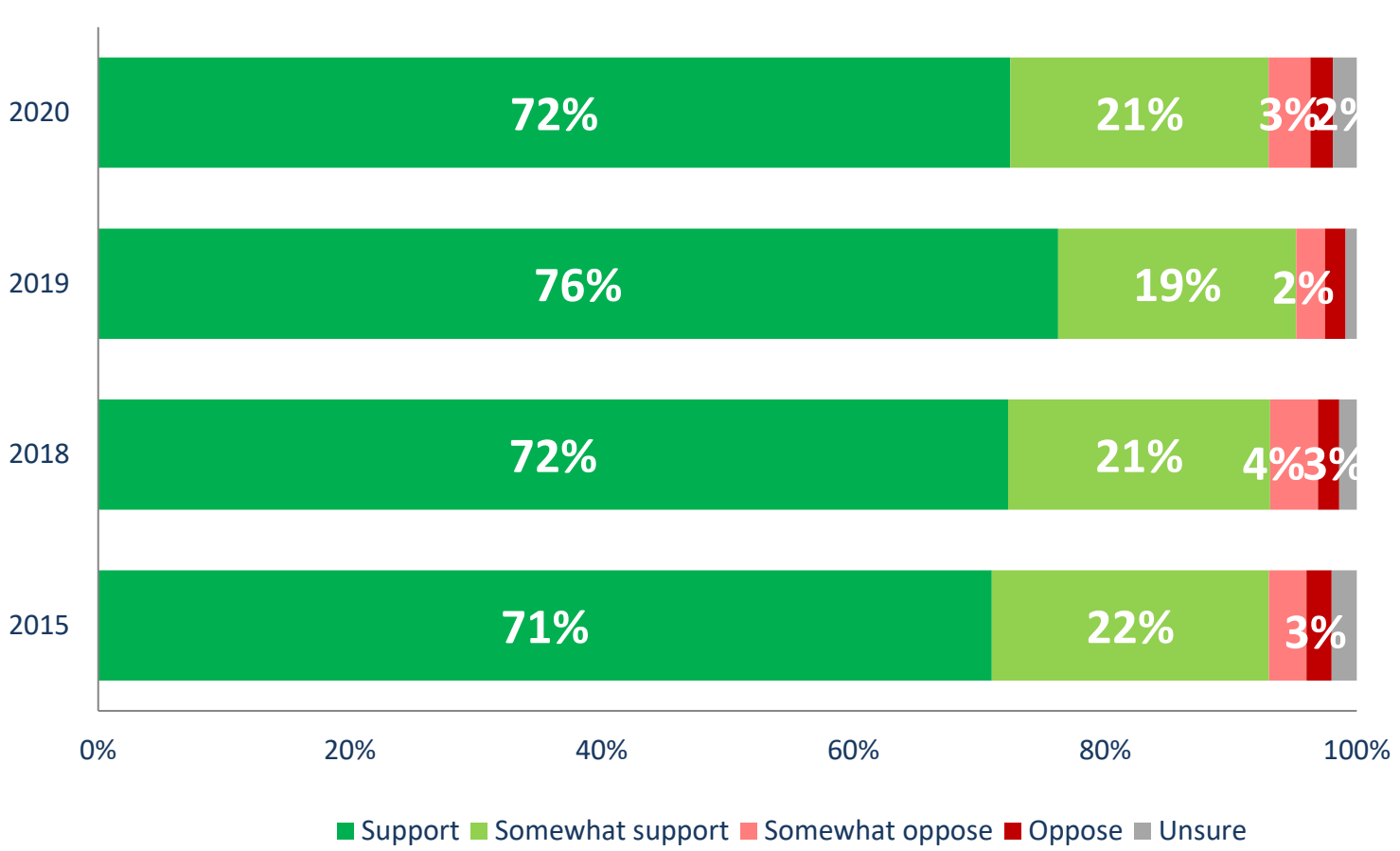
*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

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

Growth in the oil and gas sector in Canada

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 28th to July 2nd, 2020, n=1049 accurate 3.1 percentage points plus or minus, 19 times out of 20.

Growth of renewable energy sector



Net score
+87.8
+91.3
+87.6
+88.0

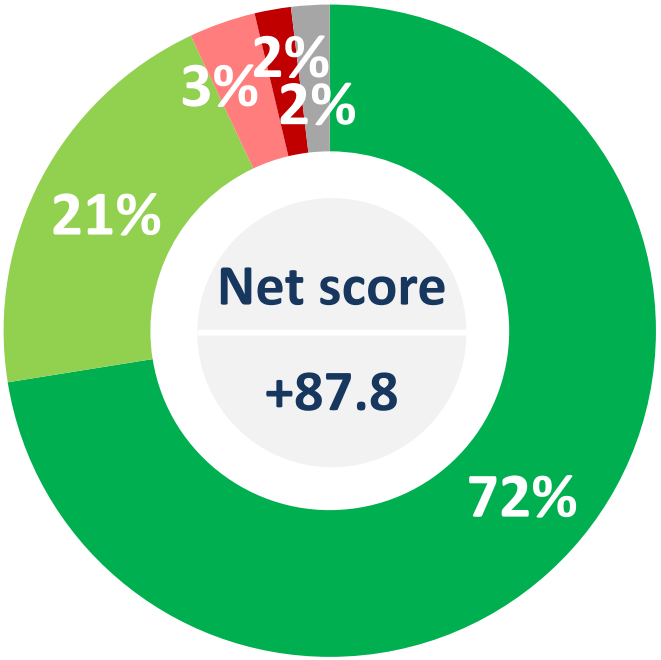
***Charts may not add up to 100 due to rounding**

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following? [RANDOMIZE]

Growth in the renewable energy sector in Canada

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 28th to July 2nd, 2020, n=1049 accurate 3.1 percentage points plus or minus, 19 times out of 20.

Growth of renewable energy sector



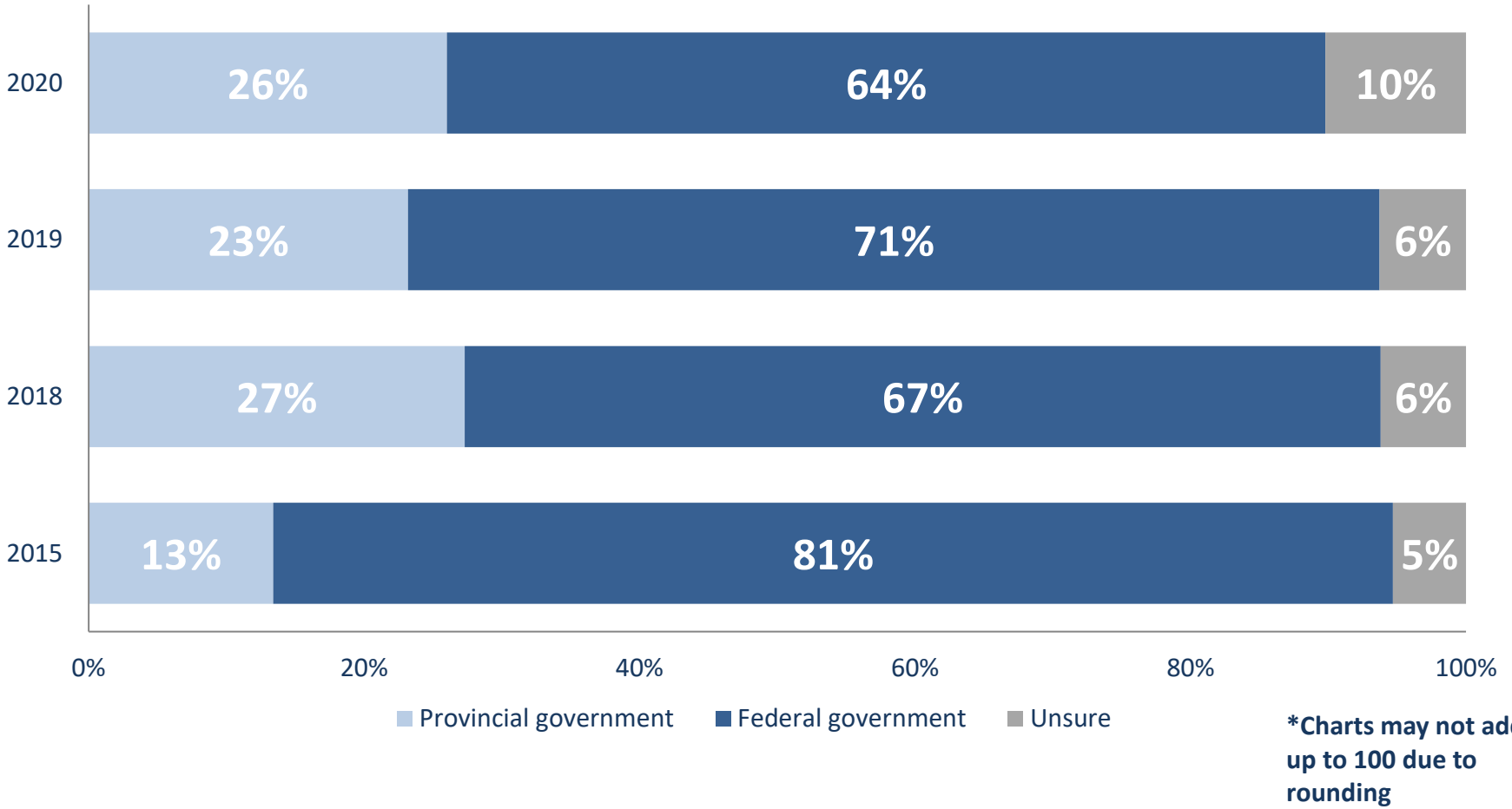
	Support/ somewhat support
Atlantic (n=100)	96.0%
Quebec (n=252)	95.6%
Ontario (n=339)	94.0%
Prairies (n=203)	86.6%
British Columbia (n=155)	92.5%
Male (n=555)	93.1%
Female (n=494)	92.8%
18 to 34 (n=270)	93.5%
35 to 54 (n=393)	93.8%
55 plus (n=386)	91.8%

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

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

Growth in the renewable energy sector in Canada

Who should lead decision making for reducing greenhouse gas emissions



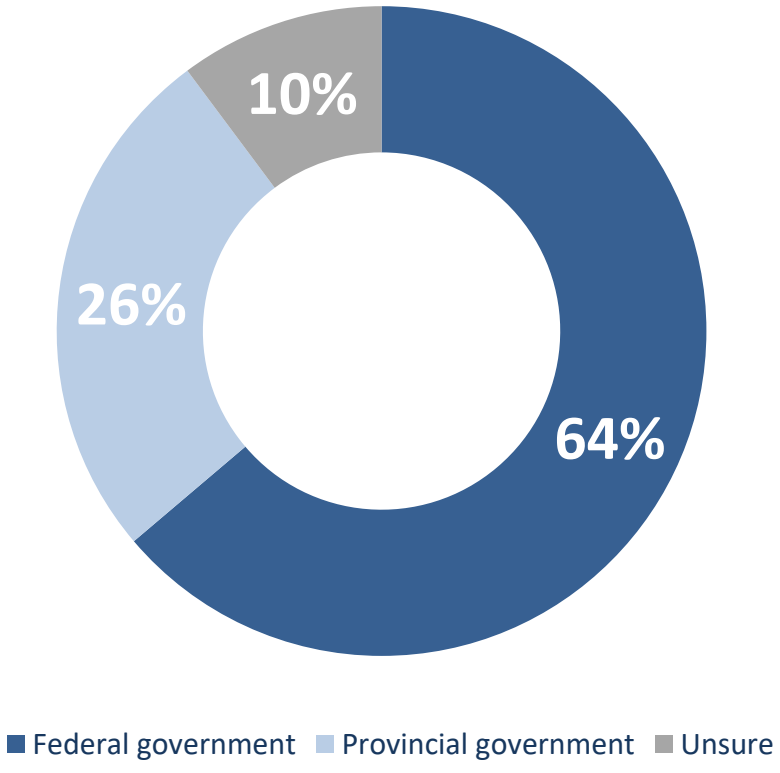
***Charts may not add up to 100 due to rounding**

QUESTION – Should the [ROTATE] provincial or the federal level of government lead decision-making for:

Reducing greenhouse gas emissions

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 28th to July 2nd, 2020, n=1049 accurate 3.1 percentage points plus or minus, 19 times out of 20.

Who should lead decision making for reducing greenhouse gas emissions



	Federal
Atlantic (n=100)	67.5%
Quebec (n=252)	70.5%
Ontario (n=339)	68.0%
Prairies (n=203)	47.0%
British Columbia (n=155)	61.3%
Male (n=555)	62.9%
Female (n=494)	64.7%
18 to 34 (n=270)	63.2%
35 to 54 (n=393)	62.4%
55 plus (n=386)	65.4%

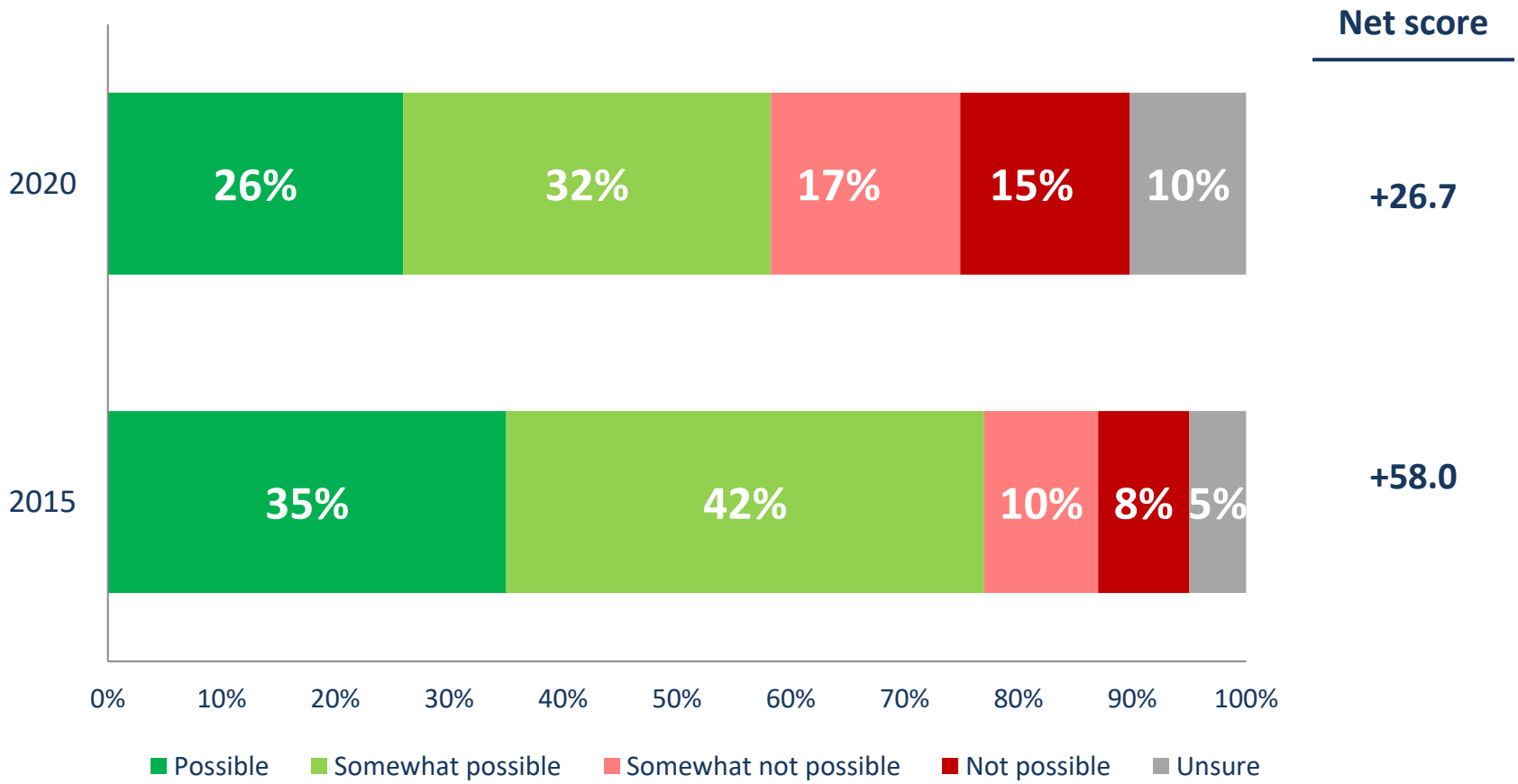
*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

QUESTION – Should the [ROTATE] provincial or the federal level of government lead decision-making for:

Reducing greenhouse gas emissions

Support for fossil fuel energy resources

POSITIVE ENERGY NANOS

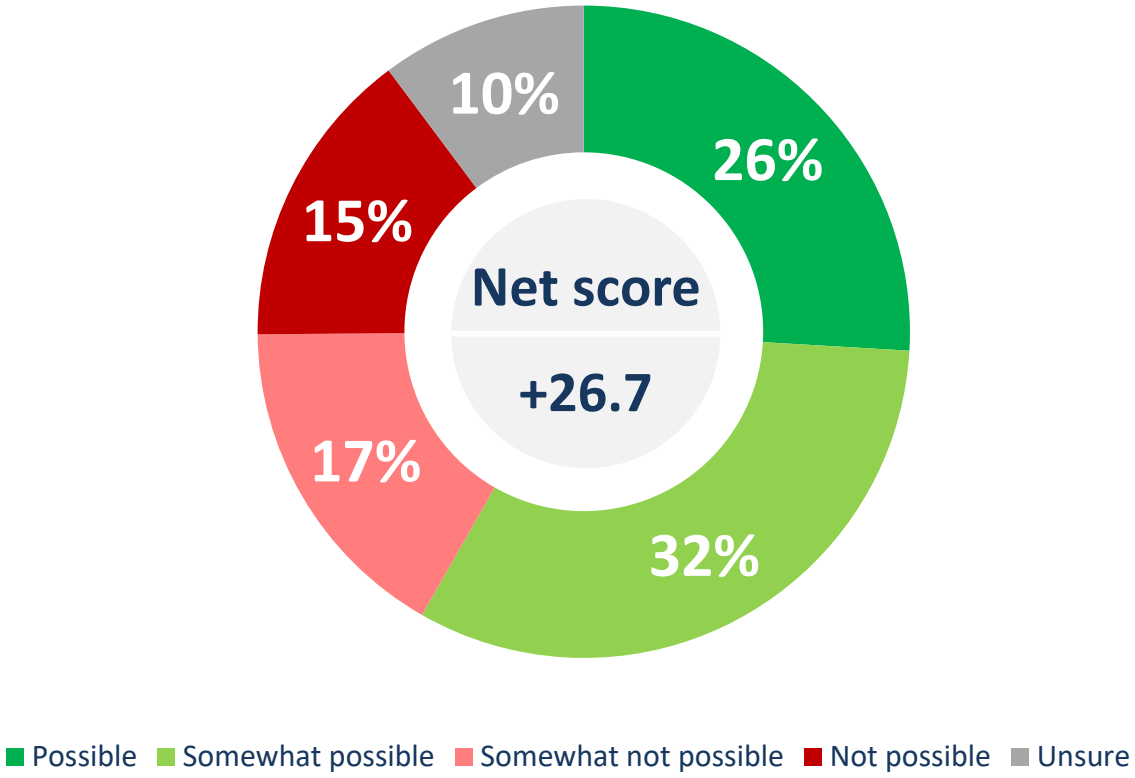


***Charts may not add up to 100 due to rounding**

QUESTION – Would you say it is possible, somewhat possible, somewhat not possible or not possible for you to be more supportive of the development of fossil fuel energy resources like oil, gas and coal if Canada had a more environmentally proactive climate change policy?

Support for fossil fuel energy resources

POSITIVE ENERGY NANOS



	Possible/ somewhat possible
Atlantic (n=100)	63.3%
Quebec (n=252)	46.7%
Ontario (n=339)	61.6%
Prairies (n=203)	67.2%
British Columbia (n=155)	54.2%
Male (n=555)	65.0%
Female (n=494)	51.8%
18 to 34 (n=270)	54.1%
35 to 54 (n=393)	57.9%
55 plus (n=386)	61.5%

*Weighted to the true population proportion.
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QUESTION – Would you say it is possible, somewhat possible, somewhat not possible or not possible for you to be more supportive of the development of fossil fuel energy resources like oil, gas and coal if Canada had a more environmentally proactive climate change policy?

METHODOLOGY

METHODOLOGY

POSITIVE ENERGY NANOS

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,049 Canadians, 18 years of age or older, between June 28th and July 2nd, 2020 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 dialling with a maximum of five call backs.

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

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

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

METHODOLOGY – Previous waves

POSITIVE ENERGY NANOS

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between August 29th and September 4th, 2019 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. The margin of error for this survey is ±3.1 percentage points, 19 times out of 20. The research was commissioned by University of Ottawa Positive Energy and was conducted by Nanos Research.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between March 31st and April 3rd, 2018. 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. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20. The research was commissioned by University of Ottawa Positive Energy and was conducted by Nanos Research.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between September 23rd and 26th, 2017 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. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20. The research was commissioned by University of Ottawa Positive Energy.

METHODOLOGY – Previous waves

POSITIVE ENERGY

NANOS

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between October 15th and 16th, 2015 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. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20. The research was commissioned by University of Ottawa Positive Energy.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between March 2nd and 3rd, 2015. 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. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20. The research was commissioned by the Positive Energy Conference in Ottawa, jointly organized by the Ivey School of Business and the University of Ottawa.

TECHNICAL NOTE

POSITIVE ENERGY NANOS

Element	Description
Research sponsor	University of Ottawa Positive Energy
Population and Final Sample Size	1049 Randomly selected individuals.
Source of Sample	Nanos Panel
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	June 28th to July 2nd, 2020.
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 (2016) 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 (2016) 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	Eleven 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, economic issues, real estate, China, COVID-19, policing, the UN, the border, employment, and charities.
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.

ABOUT NANOS

NANOS RESEARCH

As one of North America's premier market and public opinion research firms, we put strategic intelligence into the hands of decision makers. The majority of our work is for private sector and public facing organizations and ranges from market studies, managing reputation through to leveraging data intelligence. Nanos Research offers a vertically integrated full service quantitative and qualitative research practice to attain the highest standards and the greatest control over the research process. www.nanos.co

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NANOS dimap

This international joint venture between dimap and Nanos 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

NANOS RUTHERFORD McKAY & Co.

NRM is an affiliate of Nanos Research and Rutherford McKay Associates. Our service offerings are based on decades of professional experience and extensive research and include public acceptance and engagement, communications audits, and narrative development. www.nrmpublicaffairs.com

TABULATIONS

POSITIVE ENERGY NANOS

2020-1615 – Positive Energy – June Omni – STAT SHEET

				Region					Gender		Age		
			Canada 2020-07	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - 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?	Total	Unwgt N	1049	100	252	339	203	155	555	494	270	393	386
		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
		Mean	5.50	6.14	6.56	5.48	3.86	5.66	5.16	5.83	5.88	5.24	5.45
		Median	6.00	7.00	7.00	6.00	3.00	7.00	5.00	7.00	7.00	6.00	6.00
	Absolutely the worst time (0)	%	16.8	7.2	4.8	16.5	36.6	16.5	21.2	12.7	15.1	21.0	14.3
	1	%	2.4	4.6	1.8	2.2	2.7	2.5	3.0	1.9	1.4	2.4	3.1
	2	%	4.4	3.9	3.3	3.9	6.9	4.5	4.4	4.3	3.1	6.7	3.2
	3	%	5.4	4.3	4.9	7.6	3.9	2.6	5.8	5.0	5.2	3.6	7.2
	4	%	5.4	3.6	5.1	6.3	4.8	5.3	4.3	6.5	5.8	4.0	6.4
	5	%	10.9	16.5	14.3	9.3	8.3	10.5	10.6	11.2	9.4	10.2	12.6
	6	%	6.3	7.1	7.8	6.1	5.3	5.1	6.4	6.2	5.8	6.7	6.3
	7	%	10.6	9.0	11.7	10.2	8.9	13.1	9.8	11.4	12.8	7.5	11.8
	8	%	12.1	14.0	15.2	12.5	4.8	15.0	11.7	12.6	13.0	10.8	12.7
	9	%	6.1	8.1	6.6	6.4	5.9	3.8	5.1	7.1	5.4	7.2	5.7
	Absolutely the best time (10)	%	16.6	17.6	20.5	16.4	10.8	17.7	16.2	17.0	20.2	17.2	13.5
	Unsure	%	2.9	4.2	4.1	2.5	1.2	3.7	1.7	4.1	2.7	2.8	3.2

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			As you know many Canadians are concerned about both 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 ambitio				
			Canada 2020-06	The worst time (0-3)	Neutral time (4-6)	The best time (7-10)	Unsure
Question - Why do you say so? [OPEN]	Total	Unwgt N	968	286	210	454	18
		Wgt N	922	275	202	428	16
	We need to act now, climate change can't wait	%	20.9	0.6	12.1	39.0	
	The pandemic offers a good opportunity for change and highlights the extent of our potential impact	%	20.2	1.1	10.3	37.3	
	We should wait until the economy had recovered from the effects of the pandemic	%	21.3	47.2	28.5	1.8	
	Both the economy and the environment need to be taken into consideration	%	3.5	1.6	10.2	1.8	
	There are other priorities/Focus should be on health/vaccine	%	12.8	21.6	21.4	3.3	
	Uncertain times/we should wait to see how the pandemic goes	%	1.3	1.9	3.4	0.0	
	Diversifying into alternative energy sources and more environmentally friendly solutions could help the economy and c	%	7.5	1.2	3.6	13.6	
	I do not believe climate change is real or caused by humans/Canada's impact on climate change is minimal	%	4.7	13.2	3.1	0.2	
	Canada's impact on climate change is minimal	%	2.1	5.7	0.4	0.6	
	Other	%	4.5	5.9	5.4	2.5	
	Unsure	%	1.1	0.0	1.6	0.0	

*Shaded due to small sample size.

2020-1615 – Positive Energy – June Omni – STAT SHEET

Do you support, somewhat support, somewhat oppose or oppose the following? [RANDOMIZE]

				Region					Gender		Age		
			Canada 2020-07	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Growth in the oil and gas sector in Canada	Total	Unwgt N	1049	100	252	339	203	155	555	494	270	393	386
		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
	Support	%	29.4	33.2	13.0	29.9	49.4	27.4	35.4	23.6	25.0	30.8	31.4
	Somewhat support	%	22.6	19.0	20.5	24.4	25.3	19.5	24.6	20.7	18.4	25.3	23.3
	Somewhat oppose	%	24.0	23.1	38.4	20.8	13.7	22.6	20.5	27.3	25.6	22.3	24.2
	Oppose	%	20.3	19.1	23.5	20.6	9.7	29.3	17.3	23.2	25.6	19.8	17.0
	Unsure	%	3.7	5.6	4.7	4.4	1.9	1.3	2.1	5.2	5.4	1.9	4.1

Do you support, somewhat support, somewhat oppose or oppose the following? [RANDOMIZE]

				Region					Gender		Age		
			Canada 2020-07	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Growth in the renewable energy sector in Canada	Total	Unwgt N	1049	100	252	339	203	155	555	494	270	393	386
		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
	Support	%	72.4	86.3	71.4	72.5	64.1	78.7	73.5	71.5	74.9	73.0	70.2
	Somewhat support	%	20.5	9.7	24.2	21.5	22.5	13.8	19.6	21.3	18.6	20.8	21.6
	Somewhat oppose	%	3.3	1.0	2.0	2.7	7.1	3.2	3.6	3.0	3.6	2.9	3.5
	Oppose	%	1.8	0.8	0.0	1.6	4.0	3.0	2.5	1.2	0.9	2.4	1.9
	Unsure	%	1.9	2.3	2.4	1.7	2.3	1.3	0.9	3.0	2.0	0.9	2.8

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,049 Canadians, 18 years of age or older, between June 28th and July 2nd, 2020. The margin of error this survey is ±3.1 percentage points, 19 times out of 20. *Columns with n values under 30 have been shaded.

2020-1615 – Positive Energy – June Omni – STAT SHEET

			Region						Gender		Age		
			Canada 2020-07	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Should the [ROTATE] provincial or the federal level of government lead decision-making for reducing greenhouse gas emissions?	Total	Unwgt N	1049	100	252	339	203	155	555	494	270	393	386
		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
	Provincial government	%	26.0	18.0	20.7	22.7	41.5	27.6	29.3	22.9	28.5	26.0	24.2
	Federal government	%	63.8	67.5	70.5	68.0	47.0	61.3	62.9	64.7	63.2	62.4	65.4
	Unsure	%	10.2	14.6	8.9	9.3	11.6	11.0	7.9	12.4	8.3	11.5	10.3

			Region						Gender		Age		
			Canada 2020-07	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Would you say it is possible, somewhat possible, somewhat not possible or not possible for you to be more supportive of the development of fossil fuel energy resources like oil, gas and coal if Canada had a more environmentally proactive climate change policy?	Total	Unwgt N	1049	100	252	339	203	155	555	494	270	393	386
		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
	Possible	%	25.9	25.4	15.1	26.8	39.0	24.6	29.6	22.4	24.4	25.7	27.2
	Somewhat possible	%	32.3	37.9	31.6	34.7	28.2	29.6	35.4	29.4	29.7	32.2	34.3
	Somewhat not possible	%	16.6	10.6	30.6	12.7	11.5	13.5	15.4	17.8	17.7	16.5	15.9
	Not possible	%	14.9	10.9	13.6	15.4	12.4	21.3	12.3	17.5	17.0	16.7	11.9
	Unsure	%	10.2	15.2	9.1	10.3	9.0	11.0	7.3	13.0	11.1	8.8	10.7