Energy and Politics

Frontier Mine: 43% of respondents give social permission to the project; highest in Alberta and among Conservative partisans

Q From what you know, which of the following comes closest to your point of view about the project?
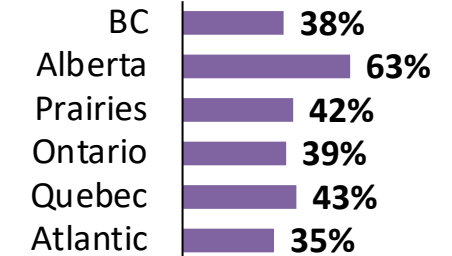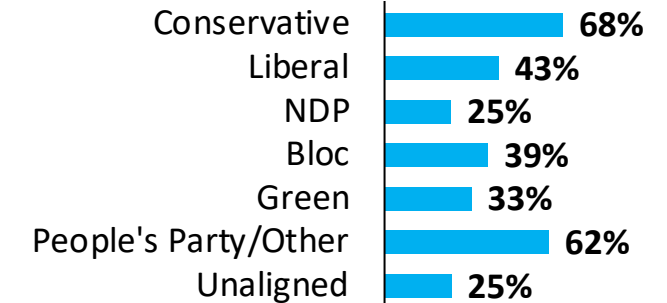[asked of all respondents; n=1,200, February 2020]

Social Permission: **43%**

24% — It's a good thing for the country and I support it

19% — I don't like it, but I think it is necessary

16% — It's a bad thing for the country and I oppose it

30% — I don't feel I know enough to judge this project

11% — Don't know
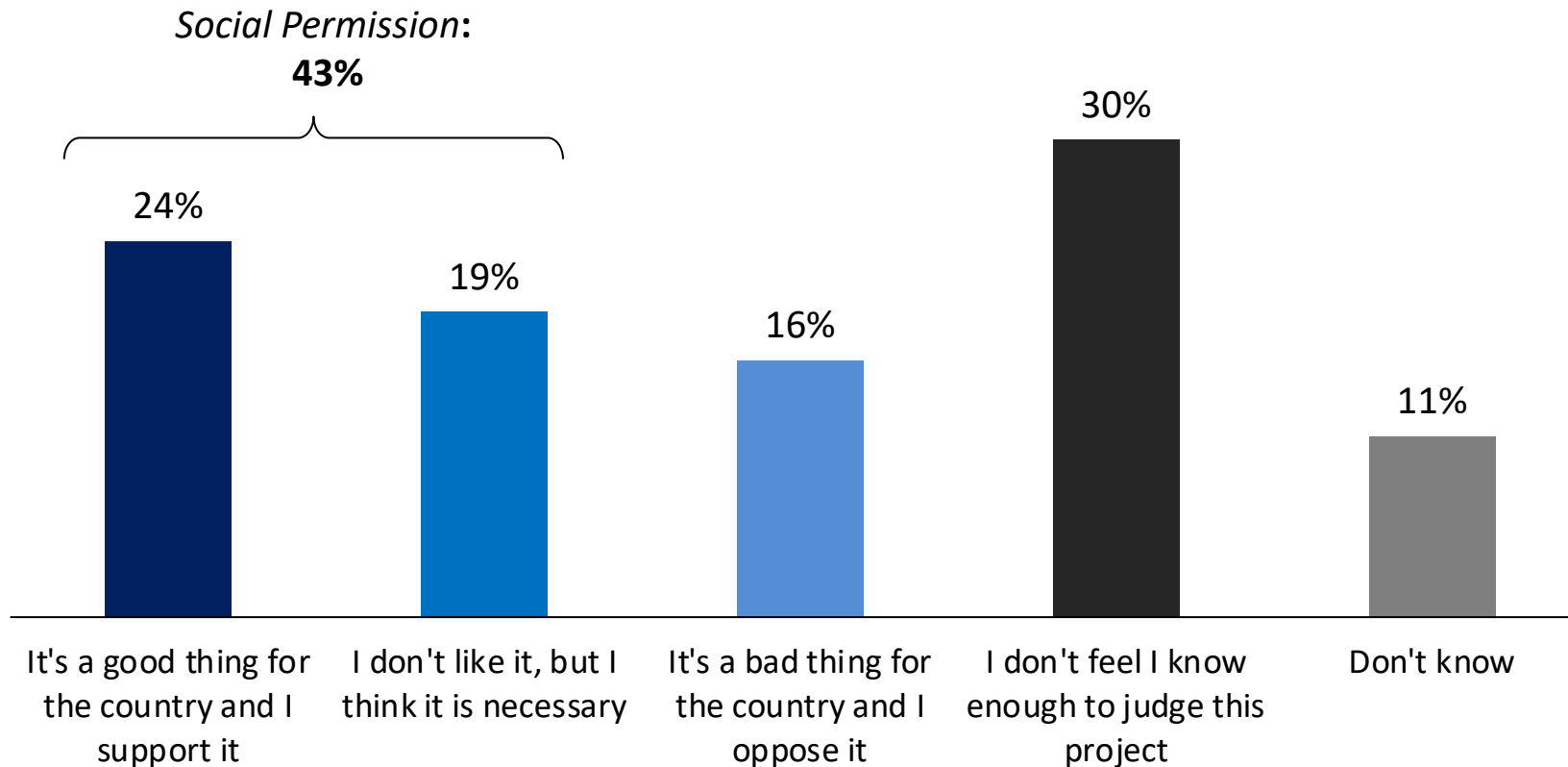
Segmentation
Respondents who give social permission

Region
BC	38%
Alberta	63%
Prairies	42%
Ontario	39%
Quebec	43%
Atlantic	35%

Party ID
Conservative	68%
Liberal	43%
NDP	25%
Bloc	39%
Green	33%
People's Party/Other	62%
Unaligned	25%

Economic Gap
Dream Achievers	53%
Dream Strugglers	51%
Ambivalent	31%
Alienated	31%

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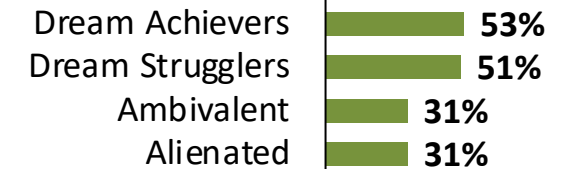RESEARCH GROUP

Who is your problem?

What the public and customers think matters only if political and regulatory decision-makers care.

Decision Makers
[Political / Regulators]
Group whose process and political obligations you will need to address.

<1%

Stakeholders | Key Influencers
[Media / Associations / Business Leaders / NGOs]
Group that drives the story and influence government and regulators. Better to have them onside than offside.

<1%

30%

Involved Public
[Opinion Leaders / Community Activists]
This is the group that will go to the media and/or elected officials if they feel their concerns are not being addressed. They also affect the opinion of the Disengaged Public.

Disengaged Public

70%

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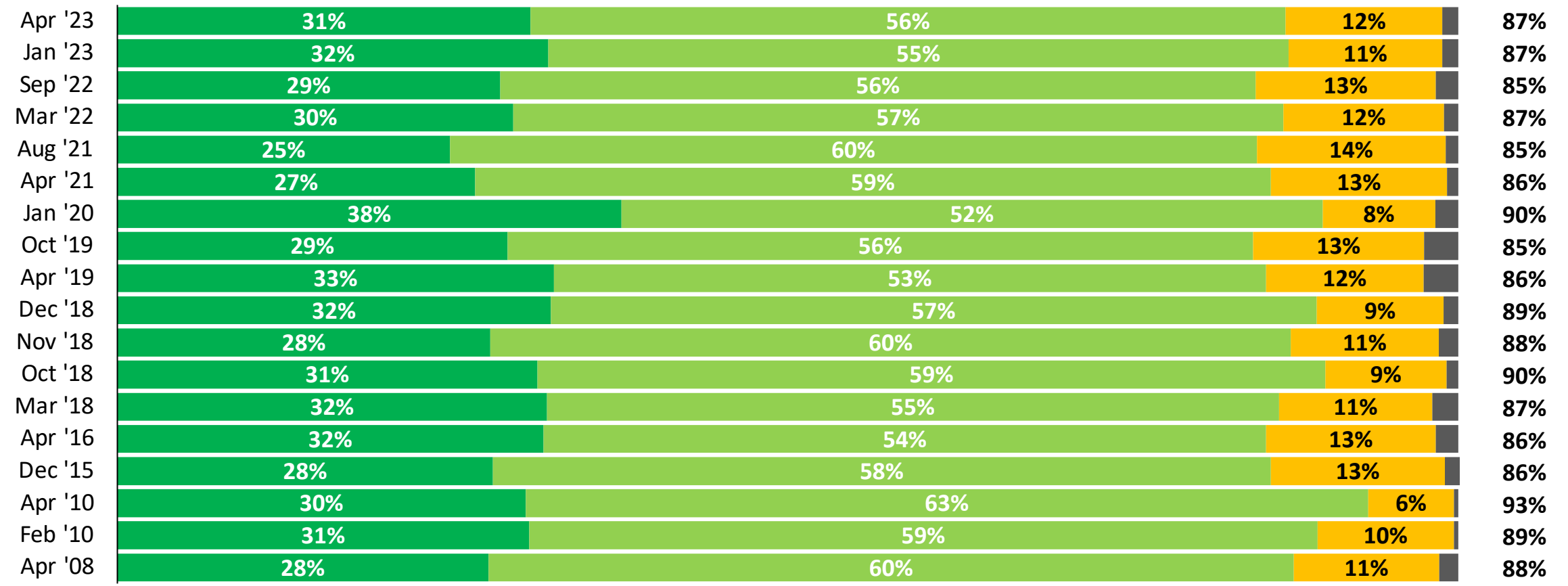RESEARCH GROUP

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What are the trends in feelings about climate change?

Familiarity with Climate Change: Familiarity with climate change remains high and steady with nearly 9-in-10 (87%) being familiar with it

Q How familiar are you with the concept of climate change?
[asked of all respondents; n=2,000]

% Familiar
(Detailed + General Understanding)

	Detailed	General	Heard	Haven't heard	% Familiar
Apr '23	31%	56%	12%		87%
Jan '23	32%	55%	11%		87%
Sep '22	29%	56%	13%		85%
Mar '22	30%	57%	12%		87%
Aug '21	25%	60%	14%		85%
Apr '21	27%	59%	13%		86%
Jan '20	38%	52%	8%		90%
Oct '19	29%	56%	13%		85%
Apr '19	33%	53%	12%		86%
Dec '18	32%	57%	9%		89%
Nov '18	28%	60%	11%		88%
Oct '18	31%	59%	9%		90%
Mar '18	32%	55%	11%		87%
Apr '16	32%	54%	13%		86%
Dec '15	28%	58%	13%		86%
Apr '10	30%	63%	6%		93%
Feb '10	31%	59%	10%		89%
Apr '08	28%	60%	11%		88%

- ■ You have a detailed understanding of climate change
- ■ You have a general understanding of climate change but don't know the details
- ■ You have heard of climate change but don't know much about it
- ■ You haven't heard of climate change before this survey

NOTE: Prior to 2010, the term "global warming" was used in place of "climate change".
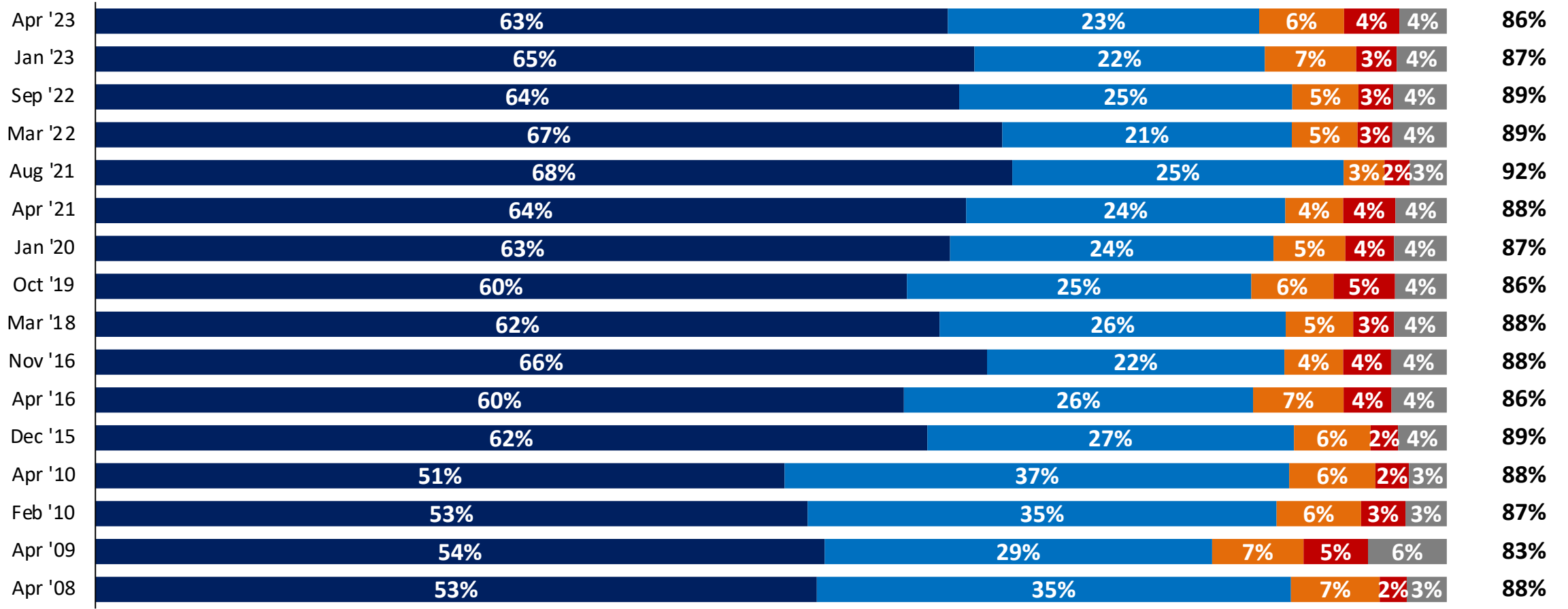
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Belief in Climate Change: Belief in climate change remains steady with nearly 2-in-3 (63%) saying 'climate change is definitely occurring'

Q Thinking about your own personal view, do you believe that…
[asked of all respondents; n=2,000]

% At least probably occurring

	Definitely occurring	Probably occurring	Probably not occurring	Definitely not occurring	Don't know	% At least probably occurring
Apr '23	63%	23%	6%	4%	4%	86%
Jan '23	65%	22%	7%	3%	4%	87%
Sep '22	64%	25%	5%	3%	4%	89%
Mar '22	67%	21%	5%	3%	4%	89%
Aug '21	68%	25%	3%	2%	3%	92%
Apr '21	64%	24%	4%	4%	4%	88%
Jan '20	63%	24%	5%	4%	4%	87%
Oct '19	60%	25%	6%	5%	4%	86%
Mar '18	62%	26%	5%	3%	4%	88%
Nov '16	66%	22%	4%	4%	4%	88%
Apr '16	60%	26%	7%	4%	4%	86%
Dec '15	62%	27%	6%	2%	4%	89%
Apr '10	51%	37%	6%	2%	3%	88%
Feb '10	53%	35%	6%	3%	3%	87%
Apr '09	54%	29%	7%	5%	6%	83%
Apr '08	53%	35%	7%	2%	3%	88%

■ Climate change is definitely occurring   ■ Climate change is probably occurring   ■ Climate change is probably not occurring
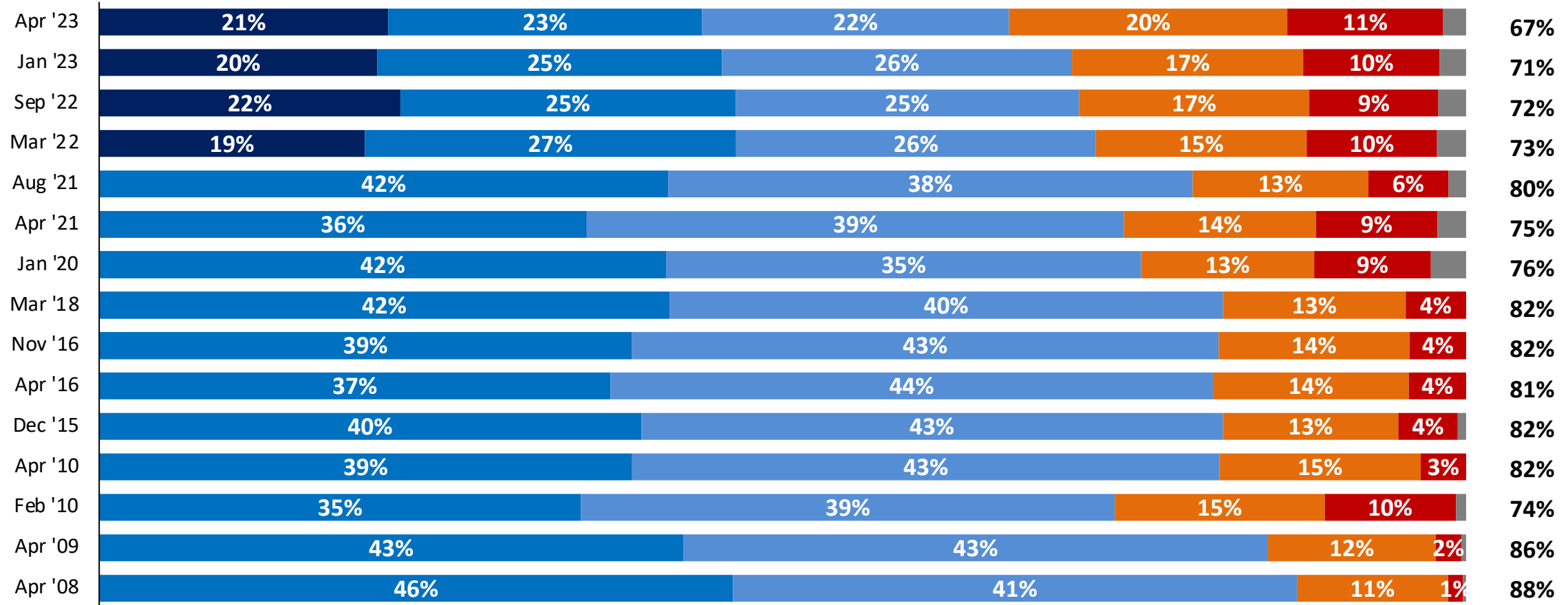■ Climate change is definitely not occurring   ■ Don't know

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Concern about Climate Change: Since last wave of tracking, concern about climate change has dropped 4 pts from 71% to 67%

Q How concerned are you about climate change?
[asked of all respondents; n=2,000]

% Concerned

Date	Extremely concerned	Very concerned	Somewhat concerned	Not very/A little bit concerned	Not concerned at all	% Concerned
Apr '23	21%	23%	22%	20%	11%	67%
Jan '23	20%	25%	26%	17%	10%	71%
Sep '22	22%	25%	25%	17%	9%	72%
Mar '22	19%	27%	26%	15%	10%	73%
Aug '21	42%		38%	13%	6%	80%
Apr '21	36%		39%	14%	9%	75%
Jan '20	42%		35%	13%	9%	76%
Mar '18	42%		40%	13%	4%	82%
Nov '16	39%		43%	14%	4%	82%
Apr '16	37%		44%	14%	4%	81%
Dec '15	40%		43%	13%	4%	82%
Apr '10	39%		43%	15%	3%	82%
Feb '10	35%		39%	15%	10%	74%
Apr '09	43%		43%	12%	2%	86%
Apr '08	46%		41%	11%	1%	88%

■ Extremely concerned ■ Very concerned ■ Somewhat concerned ■ Not very/A little bit concerned ■ Not concerned at all ■ Don't know

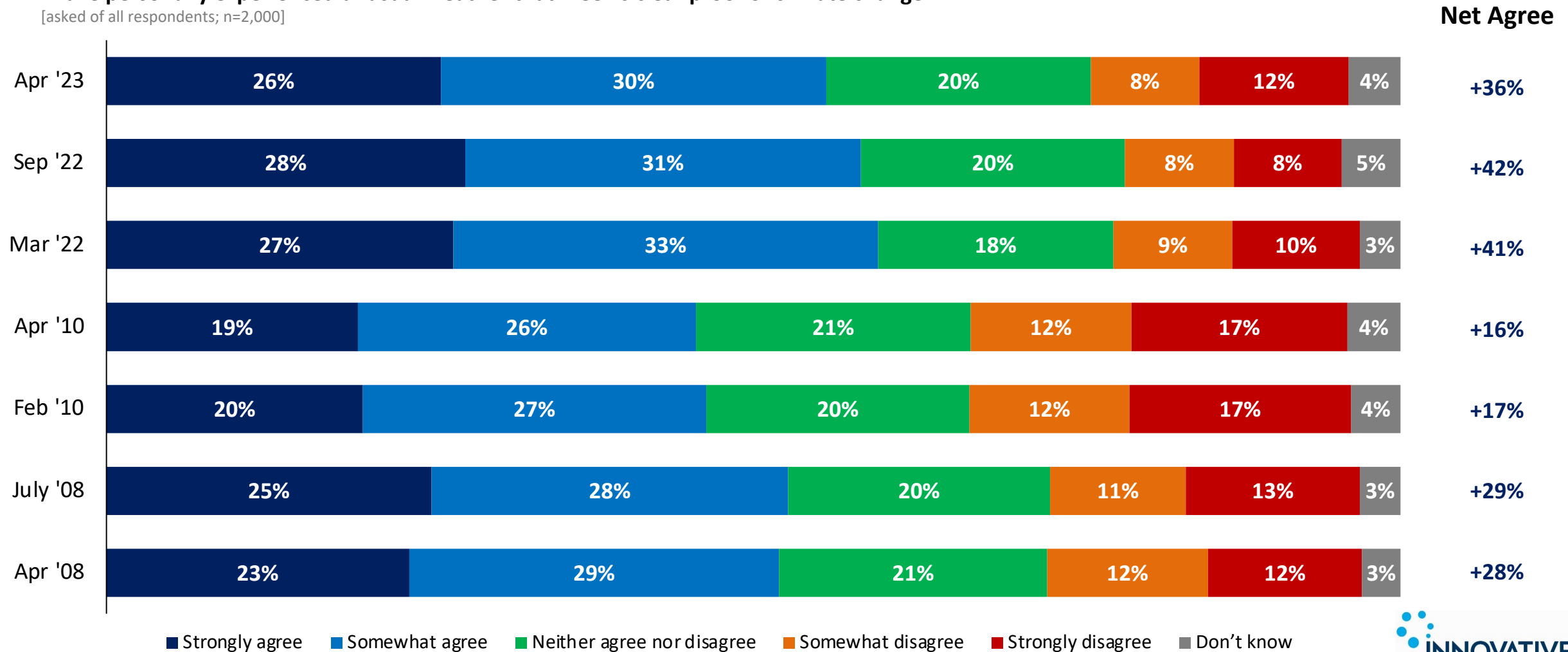**NOTE**: 'Extremely concerned' was recently added in March 2022.

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Proof of Climate Change: Net agreement that unusual weather is proof of climate change is down 6 points from 42% to 36%

Q Do you agree or disagree with the following statement?

I have personally experienced unusual weather that I feel is clear proof of climate change
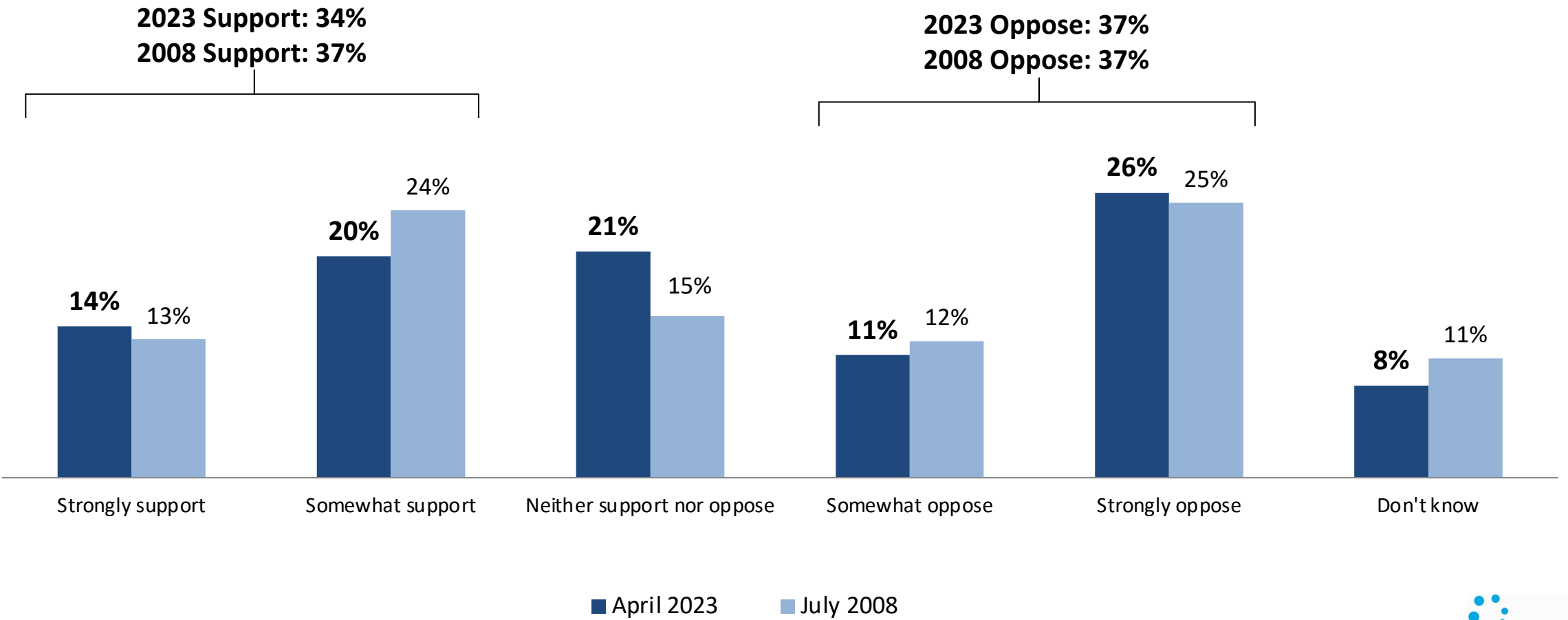[asked of all respondents; n=2,000]

Net Agree

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know	Net Agree
Apr '23	26%	30%	20%	8%	12%	4%	+36%
Sep '22	28%	31%	20%	8%	8%	5%	+42%
Mar '22	27%	33%	18%	9%	10%	3%	+41%
Apr '10	19%	26%	21%	12%	17%	4%	+16%
Feb '10	20%	27%	20%	12%	17%	4%	+17%
July '08	25%	28%	20%	11%	13%	3%	+29%
Apr '08	23%	29%	21%	12%	12%	3%	+28%

■ Strongly agree　■ Somewhat agree　■ Neither agree nor disagree　■ Somewhat disagree　■ Strongly disagree　■ Don't know

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Support for Carbon Tax: Since 2008, the level of support for carbon tax has remained steady with a marginal decrease of 3 points

Q Do you support or oppose the idea of a carbon tax?
[asked of all respondents; n=2,000]

2023 Support: 34%
2008 Support: 37%

2023 Oppose: 37%
2008 Oppose: 37%

	Strongly support	Somewhat support	Neither support nor oppose	Somewhat oppose	Strongly oppose	Don't know
April 2023	14%	20%	21%	11%	26%	8%
July 2008	13%	24%	15%	12%	25%	11%

■ April 2023   ■ July 2008

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People are conflicted about the energy transition

Exploring Energy Transition Attitudes

For most people, the issue of an energy transition away from fossil fuels is complex. Some Canadians agree with positions from both sides of the debate. In this survey, we asked respondents to agree or disagree with three oil-friendly statements and three transition-friendly statements.

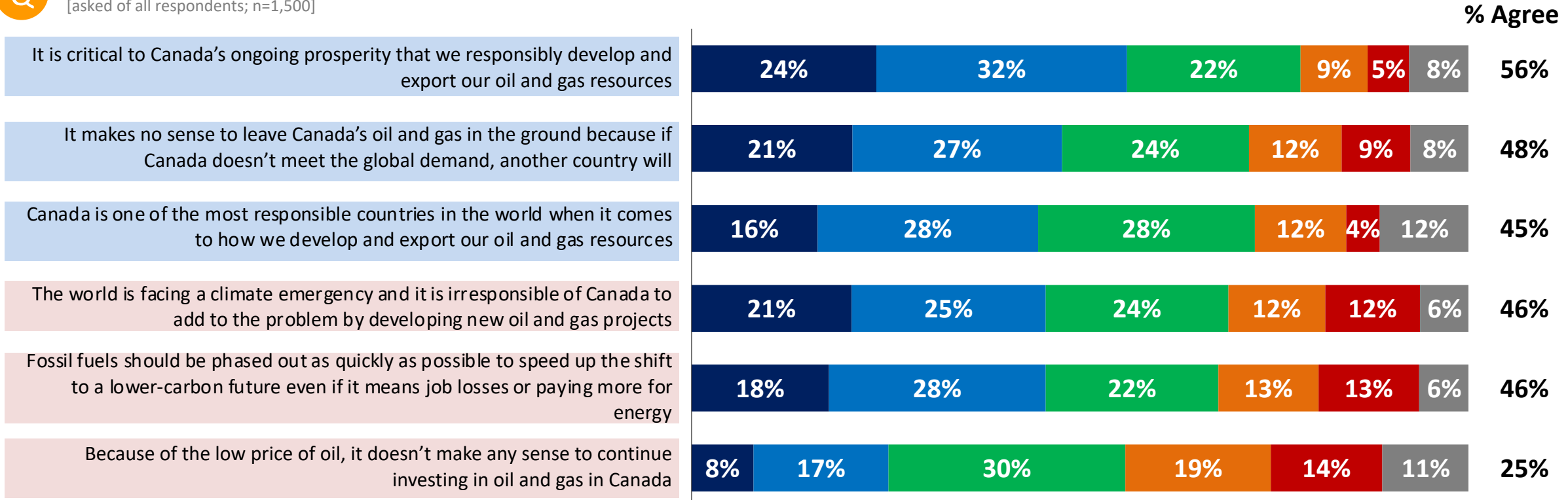| Pro-Oil Statements	Pro-Transition Statements
It is critical to Canada's ongoing prosperity that we responsibly develop and export our oil and gas resources.	Fossil fuels should be phased out as quickly as possible to speed up the shift to a lower-carbon future even if it means job losses or paying more for energy.
Canada is one of the most responsible countries in the world when it comes to how we develop and export our oil and gas resources.	The world is facing a climate emergency and it is irresponsible of Canada to add to the problem by developing new oil and gas projects.
It makes no sense to leave Canada's oil and gas in the ground because if Canada doesn't meet the global demand, another country will.	Because of the low price of oil, it doesn't make any sense to continue investing in oil and gas in Canada.

We then grouped respondents based on whether they tended to hold more pro-oil views, more pro-transition views, a mix of views or whether they were generally on the fence.

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Key Attitudes: A majority agree that it is critical for Canada's prosperity to responsibly develop oil and gas resources

To fully understand Canadians' attitudes towards oil/gas developments, we ask respondents to react to a series of agree and disagree statements on energy transition from a wide range of perspectives. Based on their responses, we then group respondents who share similar attitudes into groups for further analysis. (September 2022)

Q Do you agree or disagree with the following statements?
[asked of all respondents; n=1,500]

% Agree

Statement	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know	% Agree
It is critical to Canada's ongoing prosperity that we responsibly develop and export our oil and gas resources	24%	32%	22%	9%	5%	8%	**56%**
It makes no sense to leave Canada's oil and gas in the ground because if Canada doesn't meet the global demand, another country will	21%	27%	24%	12%	9%	8%	**48%**
Canada is one of the most responsible countries in the world when it comes to how we develop and export our oil and gas resources	16%	28%	28%	12%	4%	12%	**45%**
The world is facing a climate emergency and it is irresponsible of Canada to add to the problem by developing new oil and gas projects	21%	25%	24%	12%	12%	6%	**46%**
Fossil fuels should be phased out as quickly as possible to speed up the shift to a lower-carbon future even if it means job losses or paying more for energy	18%	28%	22%	13%	13%	6%	**46%**
Because of the low price of oil, it doesn't make any sense to continue investing in oil and gas in Canada	8%	17%	30%	19%	14%	11%	**25%**

Pro-oil statements

Pro-transition statements

- ■ Strongly agree
- ■ Somewhat agree
- ■ Neither agree nor disagree
- ■ Somewhat disagree
- ■ Strongly disagree
- ■ Don't know

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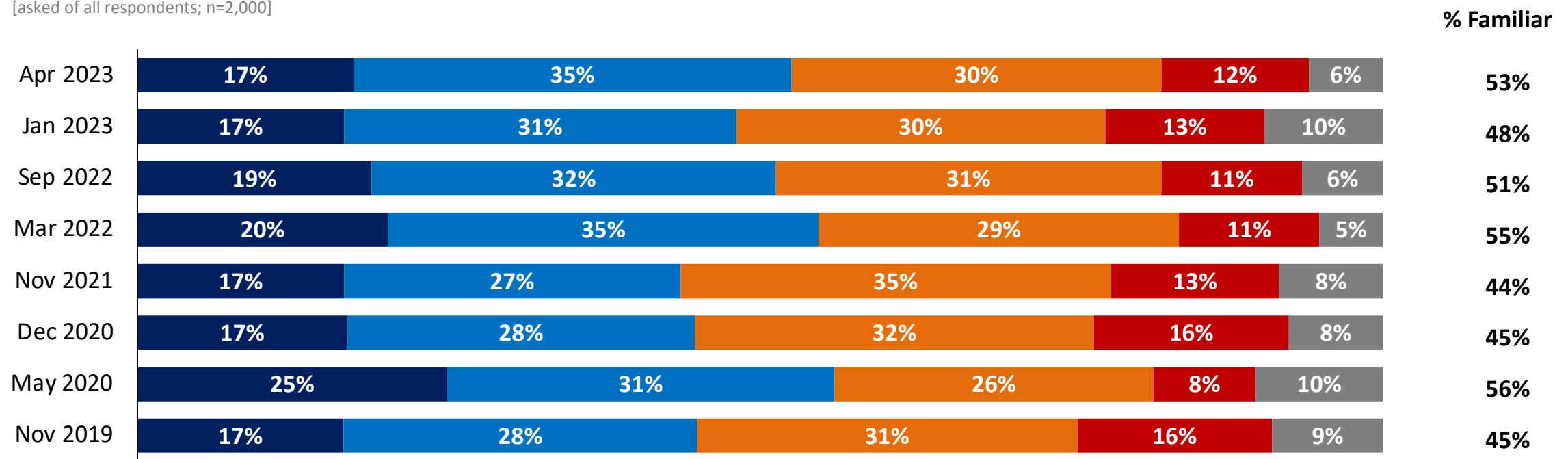RESEARCH GROUP

Energy transition basics

Energy Transition Familiarity Tracking: Familiarity with energy transition is up 5 pts from 48% to 53% since January

Q One issue people have been talking about lately is the idea that Canada and the world may be transitioning from its current energy system that depends highly on carbon-based fossil fuels like coal, oil and gas to a lower-carbon energy system.

How familiar are you with the idea of transitioning from its current energy system that depends highly on carbon-based fuels to a lower-carbon energy system?
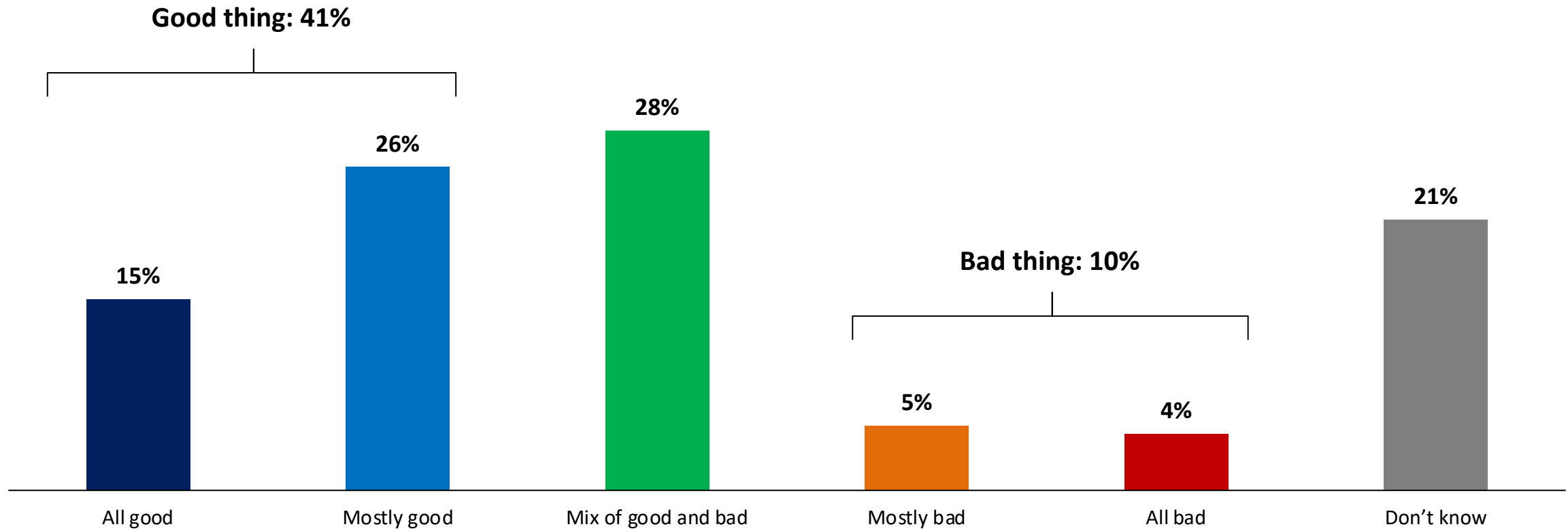[asked of all respondents; n=2,000]

% Familiar

	I understand the details	I am familiar with the idea	I have heard of the idea	I have not heard	Don't know	% Familiar
Apr 2023	17%	35%	30%	12%	6%	**53%**
Jan 2023	17%	31%	30%	13%	10%	**48%**
Sep 2022	19%	32%	31%	11%	6%	**51%**
Mar 2022	20%	35%	29%	11%	5%	**55%**
Nov 2021	17%	27%	35%	13%	8%	**44%**
Dec 2020	17%	28%	32%	16%	8%	**45%**
May 2020	25%	31%	26%	8%	10%	**56%**
Nov 2019	17%	28%	31%	16%	9%	**45%**

■ I understand the details and can explain them to others
■ I am familiar with the idea of an energy transition but cannot explain it to others
■ I have heard of the idea of an energy transition but I don't know the details
■ I have not heard about the idea of an energy transition before this survey
■ Don't know

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Impression of Energy Transition: 2-in-5 (41%) say energy transition sounds like a good thing while only 10% say it sounds like a bad thing

Q From what you know or based on your first impression, does energy transition sound like a good thing or a bad thing?
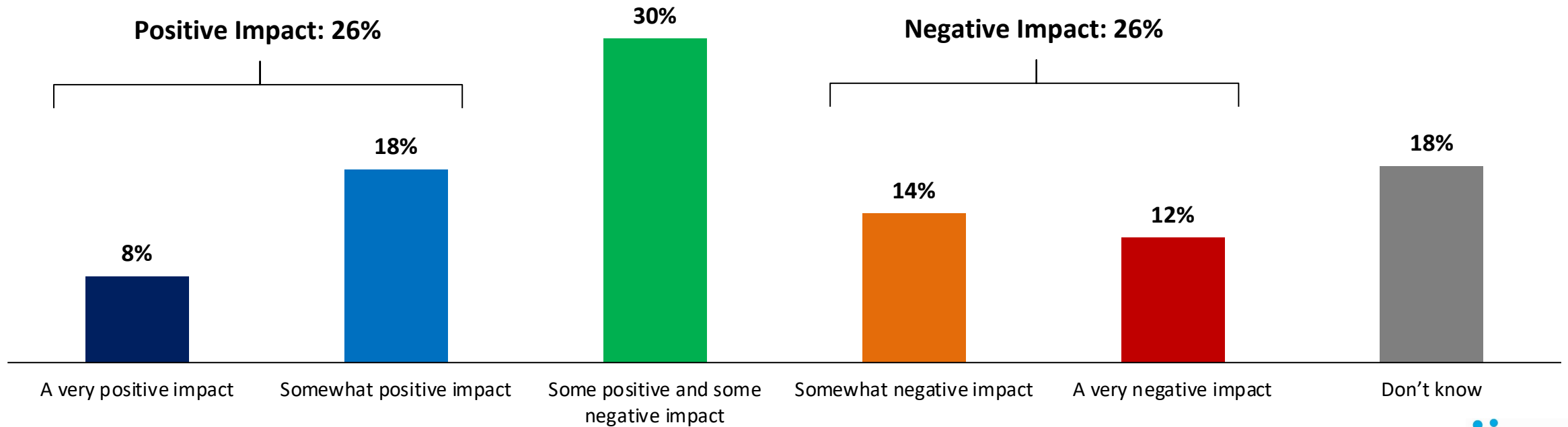[asked of all respondents; n=2,000]

Good thing: 41%

Bad thing: 10%

- All good: 15%
- Mostly good: 26%
- Mix of good and bad: 28%
- Mostly bad: 5%
- All bad: 4%
- Don't know: 21%

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Energy Transition Impact: Canadians are divided over the impact of the energy transition on their household finances

Q From what you know or based on your first impression, what impact do you expect the energy transition to have on your household financial situation?
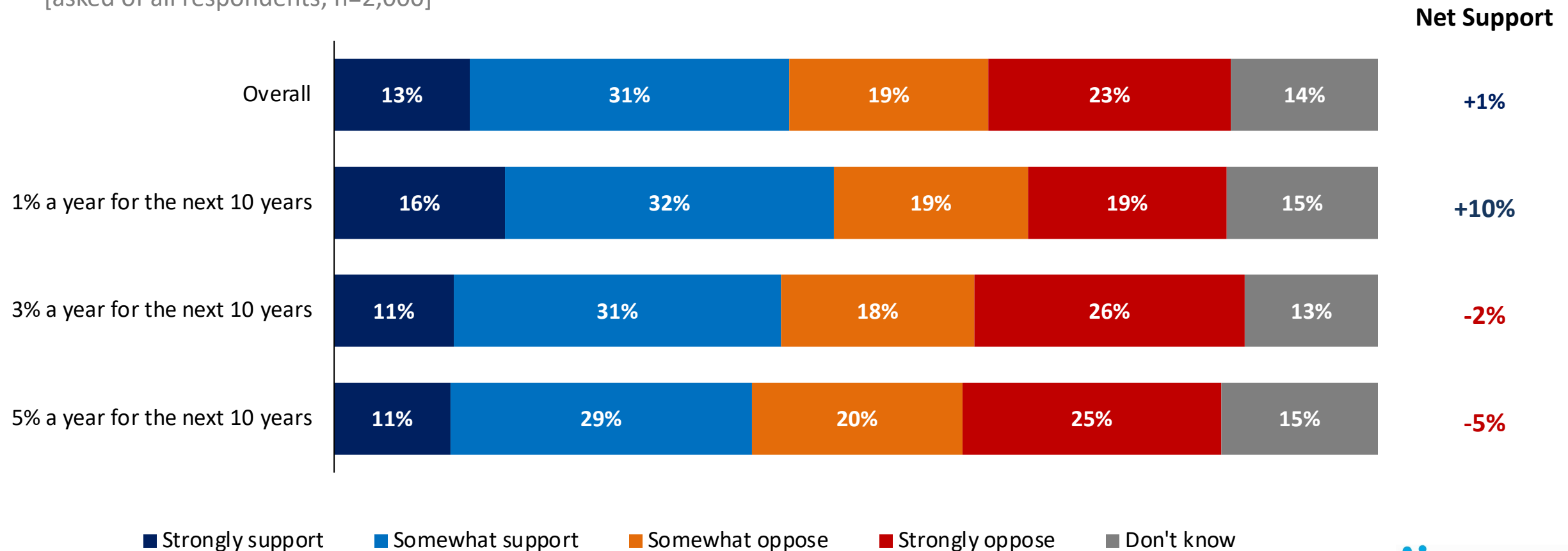[asked of all respondents; n=2,000]

Positive Impact: 26%

Negative Impact: 26%

- A very positive impact: 8%
- Somewhat positive impact: 18%
- Some positive and some negative impact: 30%
- Somewhat negative impact: 14%
- A very negative impact: 12%
- Don't know: 18%

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Electrification Pricing: Overall, net support for a bill increase is split; highest support for a marginal increase of 1%

Q To implement the energy transition, electricity prices will have to rise to pay to expand the electricity grid with non-emitting generation. You might be able to offset some of these costs by reducing the amount of automotive fuel or home heating fuel you currently purchase. The more we pay in electricity rates, the quicker we can implement the energy transition. Do you support or oppose investments to enable electrification, if in addition to routine increases, your electricity bill will grow by:
[asked of all respondents; n=2,000]

Net Support

	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	Don't know	Net Support
Overall	13%	31%	19%	23%	14%	+1%
1% a year for the next 10 years	16%	32%	19%	19%	15%	+10%
3% a year for the next 10 years	11%	31%	18%	26%	13%	-2%
5% a year for the next 10 years	11%	29%	20%	25%	15%	-5%

■ Strongly support ■ Somewhat support ■ Somewhat oppose ■ Strongly oppose ■ Don't know

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Energy Transition Attitudes Tracking: Transition-skeptic narrative has gained 11 points in 18 months

Q Based on what you know about an energy transition, which of the following statements is closest to your point of view?
[asked of all respondents; n=2,000]
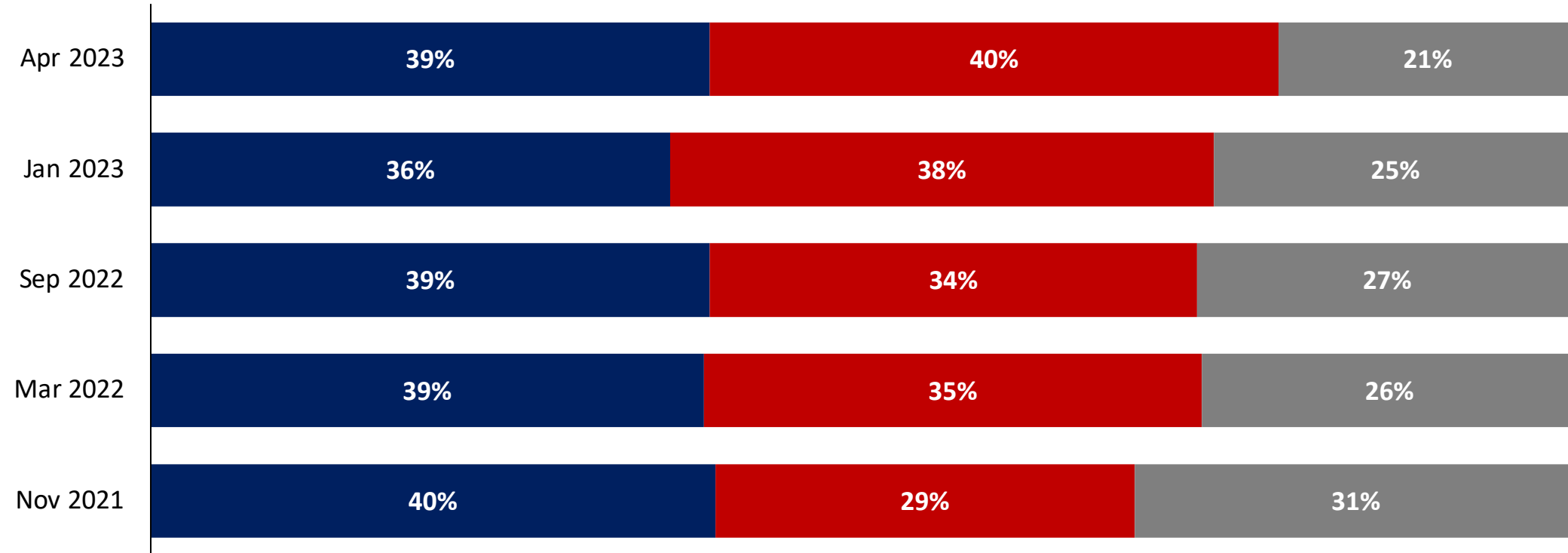
	Government policies to accelerate the transition away from oil and gas show Canada is a leader on climate change	Government policies to accelerate the transition away from oil and gas risk increasing the cost of living and losing jobs	Don't know
Apr 2023	39%	40%	21%
Jan 2023	36%	38%	25%
Sep 2022	39%	34%	27%
Mar 2022	39%	35%	26%
Nov 2021	40%	29%	31%

■ Government policies to accelerate the transition away from oil and gas show Canada is a leader on climate change and help make the world better for future generations.

■ Government policies to accelerate the transition away from oil and gas risk increasing the cost of living and losing jobs in Canada, and aren't likely to have a significant impact on climate change.

■ Don't know

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Federal Politics

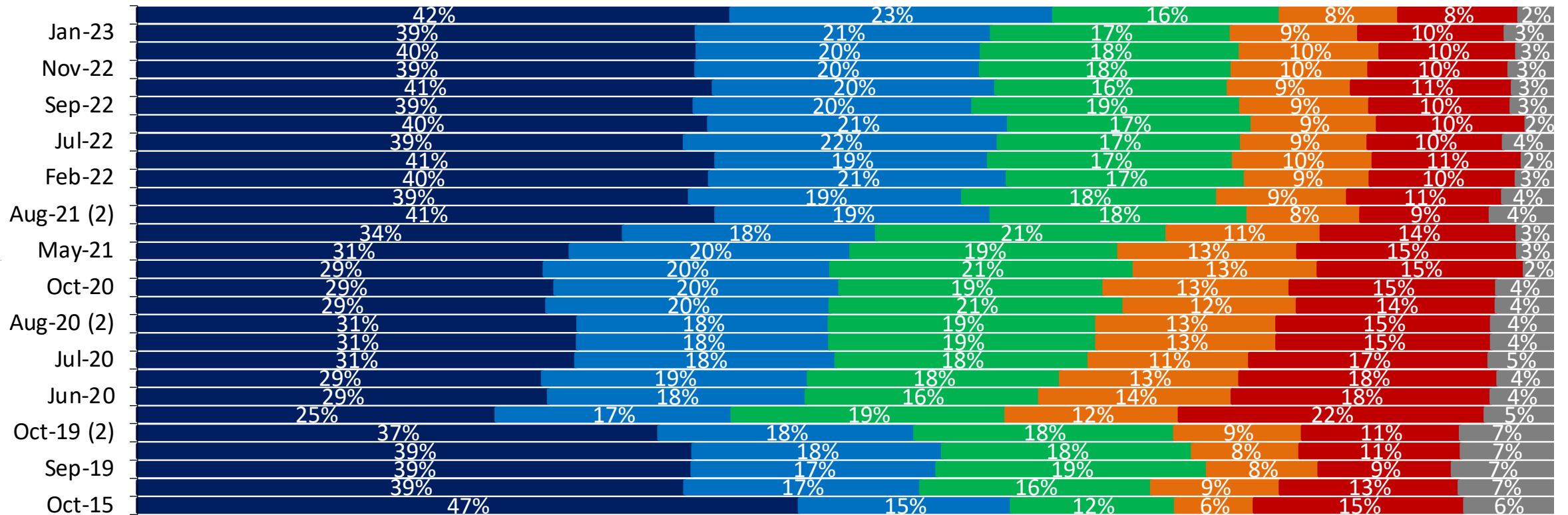INNOVATIVE
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Federal Decided Vote Tracking:

Q If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[DECIDED]**
[only decided voters; n=1728]

Conservative ● Liberal ● NDP ● Bloc ● Green ● Other

Current data: April 2023

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Time for Change Tracking:

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Jan-23	42%	23%	16%	8%	8%	2%
	39%	21%	17%	9%	10%	3%
Nov-22	40%	20%	18%	10%	10%	3%
	39%	20%	18%	10%	10%	3%
Sep-22	41%	20%	16%	9%	11%	3%
	39%	20%	19%	9%	10%	3%
Jul-22	40%	21%	17%	9%	10%	2%
	39%	22%	17%	9%	10%	4%
Feb-22	41%	19%	17%	10%	11%	2%
	40%	21%	17%	9%	10%	3%
Aug-21 (2)	39%	19%	18%	9%	11%	4%
	41%	19%	18%	8%	9%	4%
May-21	34%	18%	21%	11%	14%	3%
	31%	20%	19%	13%	15%	3%
Oct-20	29%	20%	21%	13%	15%	2%
	29%	20%	19%	13%	15%	4%
Aug-20 (2)	29%	20%	21%	12%	14%	4%
	31%	18%	19%	13%	15%	4%
Jul-20	31%	18%	19%	13%	15%	4%
	31%	18%	18%	11%	17%	5%
Jun-20	29%	19%	18%	13%	18%	4%
	29%	18%	16%	14%	18%	4%
Oct-19 (2)	25%	17%	19%	12%	22%	5%
	37%	18%	18%	9%	11%	7%
Sep-19	39%	18%	18%	8%	11%	7%
	39%	17%	19%	8%	9%	7%
	39%	17%	16%	9%	13%	7%
Oct-15	47%	15%	12%	6%	15%	6%

Legend: ■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

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Time for Change Tracking:

Q Do you agree or disagree with the following statements? - The Liberals may have their problems but they are still the best party to form government
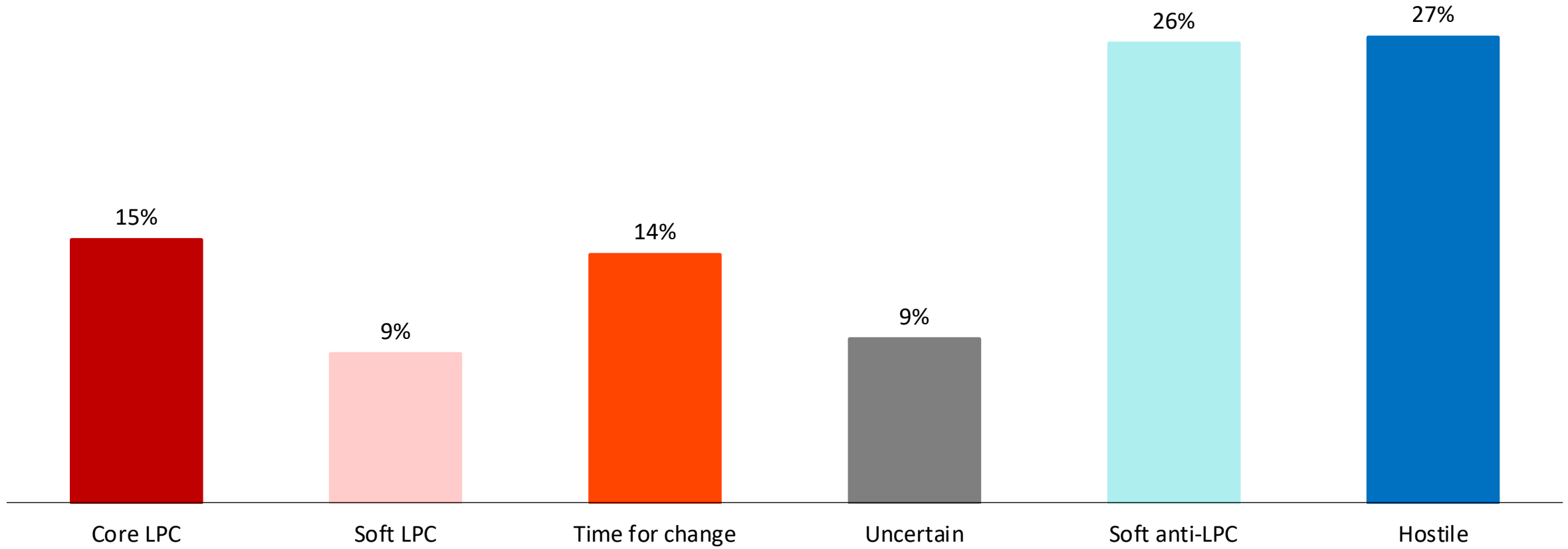[asked of all respondents; n=2000]

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Apr-23	14%	22%	19%	12%	29%	4%
Dec-22	16%	22%	17%	13%	28%	4%
Oct-22	16%	22%	18%	13%	28%	4%
	15%	23%	18%	13%	28%	4%
Aug-22	15%	22%	17%	12%	30%	4%
	14%	22%	18%	13%	29%	5%
Mar-22	16%	20%	18%	12%	32%	3%
	13%	22%	18%	12%	30%	5%
Sep-21	14%	23%	18%	14%	28%	3%
	15%	20%	19%	12%	31%	3%
Aug-21	17%	19%	18%	12%	29%	4%
	16%	18%	18%	13%	30%	5%
Mar-21	20%	21%	17%	11%	28%	3%
	18%	23%	19%	12%	25%	3%
Sep-20	18%	25%	19%	11%	25%	3%
	18%	24%	18%	13%	23%	4%
Aug-20	16%	25%	17%	13%	24%	5%
	18%	26%	15%	11%	25%	5%
Jun-20 (2)	18%	26%	15%	11%	25%	5%
	20%	22%	17%	11%	25%	6%
May-20	22%	24%	16%	11%	24%	4%
	23%	21%	16%	12%	23%	6%
Oct-19	22%	22%	18%	11%	21%	5%
	19%	18%	16%	12%	27%	8%
Apr-19	19%	17%	17%	12%	28%	7%
	18%	19%	16%	11%	28%	8%
Jun-13	20%	18%	14%	10%	31%	8%
	20%	12%	12%	10%	39%	7%
	17%	14%	16%	11%	37%	5%

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Time for Change Segmentation:

Core LPC	Soft LPC	Time for change	Uncertain	Soft anti-LPC	Hostile
15%	9%	14%	9%	26%	27%

Current data: April 2023

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Combined Vote by Time for Change:

Time for Change

Federal Combined Vote	Core LPC (N=301)	Soft LPC (N=170)	Time for change (N=284)	Uncertain (N=187)	Soft anti-LPC (N=526)	Hostile (N=533)
Conservative	1%	6%	16%	9%	26%	66%
Liberal	81%	56%	43%	14%	7%	0%
NDP	10%	16%	17%	14%	30%	11%
Bloc	3%	6%	6%	8%	7%	3%
Green	3%	3%	7%	5%	8%	4%
Other	1%	2%	6%	2%	4%	7%
Undecided DK	2%	10%	4%	38%	15%	7%
Would not vote/None	0%	1%	1%	9%	4%	2%

Note: Current data: April 2023

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Federal Read, Seen, Heard, Impact Tracking:

Q Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards Canada's Prime Minister and the Federal government?
[asked of those who have RSH; n=833]

Legend: A lot more favourable · Somewhat more favourable · Made no difference · Somewhat less favourable · A lot less favourable

Left axis labels: 35%, 14%, 33%, 11%, 6%
Right axis labels: 32%, 18%, 31%, 12%, 7%

INNOVATIVE
RESEARCH GROUP
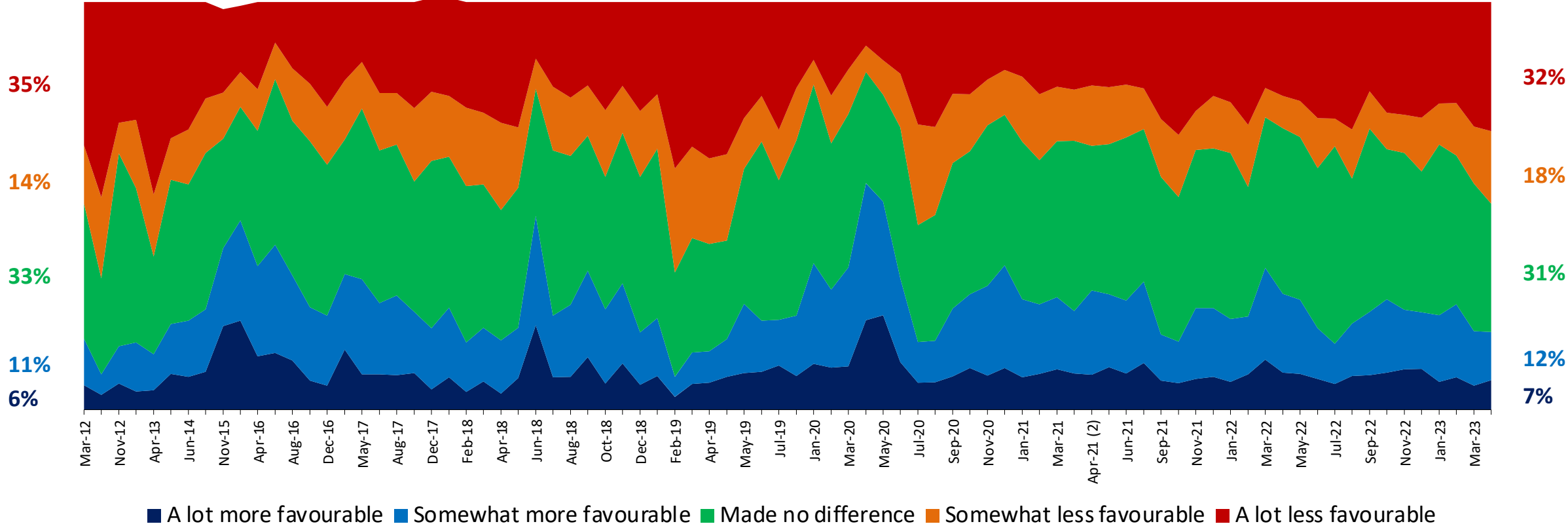
Awareness:

Over half of the respondents have not been following the controversy closely; 2-in-5 were following closely

Q How closely have you been following the controversy about China's alleged interference in Canada's 2019 and 2021 elections?
[asked of all respondents, n=2,000, March 16 to, 29]

Closely: 40%

Not closely: 57%

- Very closely: **10%**
- Somewhat closely: **30%**
- Not very closely: **35%**
- Not at all: **22%**
- Don't know: **3%**

Week 1 — Closely **40%** / Not closely **57%**
Week 2 — Closely **40%** / Not closely **57%**

■ Closely ■ Not closely
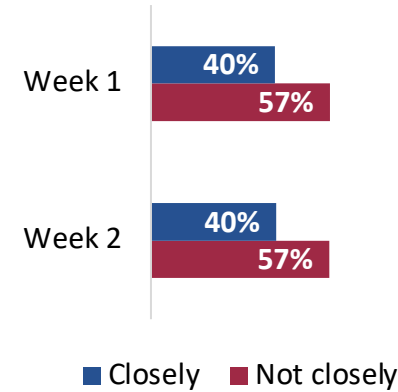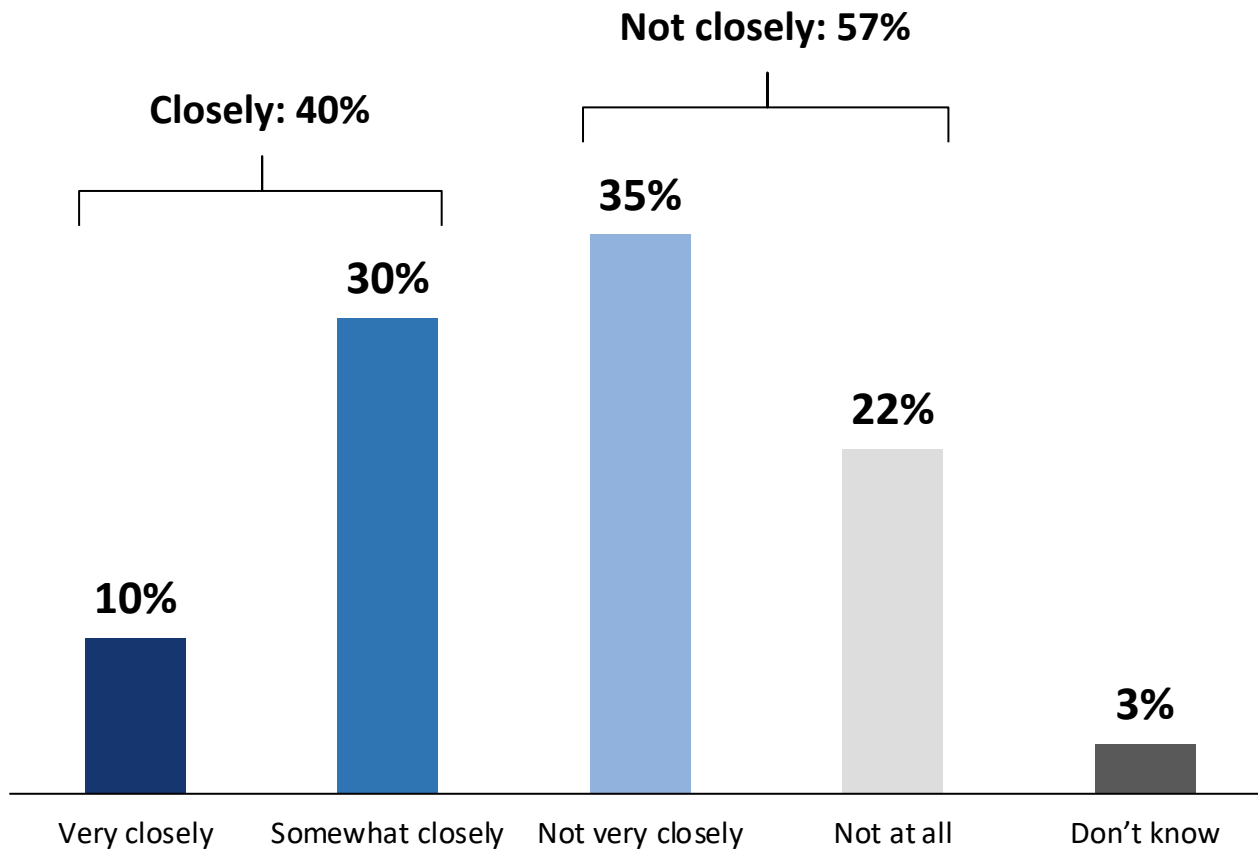
The respondents' level of interest in the controversy has remained constant over the two-week survey period.

Segmentation
Respondents who say 'Closely'

Federal Party ID
- Liberal **45%**
- Conservative **50%**
- NDP **31%**
- Green/Other **45%**
- Unaligned **25%**

Region
- BC **43%**
- AB **40%**
- Prairies **41%**
- ON **43%**
- QC **34%**
- Atlantic **35%**

INNOVATIVE
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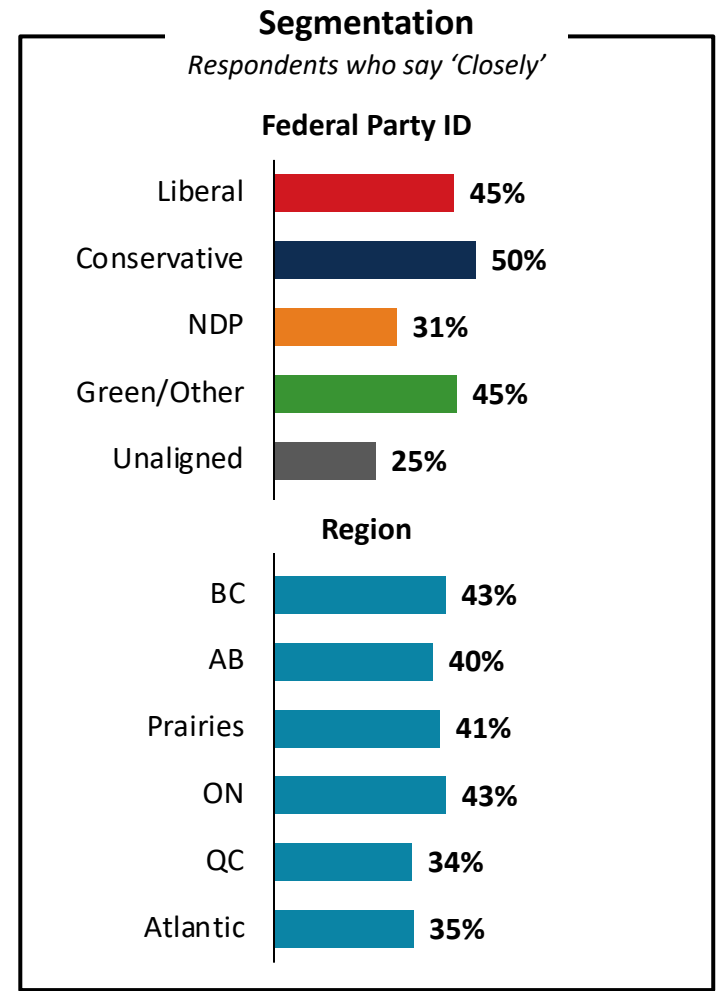
Initial Reaction:

64% of the respondents were angry when they first heard the allegation; 1-in-5 were not angry

Q How did you feel when you heard the allegation that China has been interfering in Canada's 2019 and 2021 elections?
[asked of all respondents, n=2,000]

Angry: 64%

Very angry 29%
Somewhat angry 36%

Not angry: 19%

Not very angry 12%
Not at all angry 7%

Don't know 17%
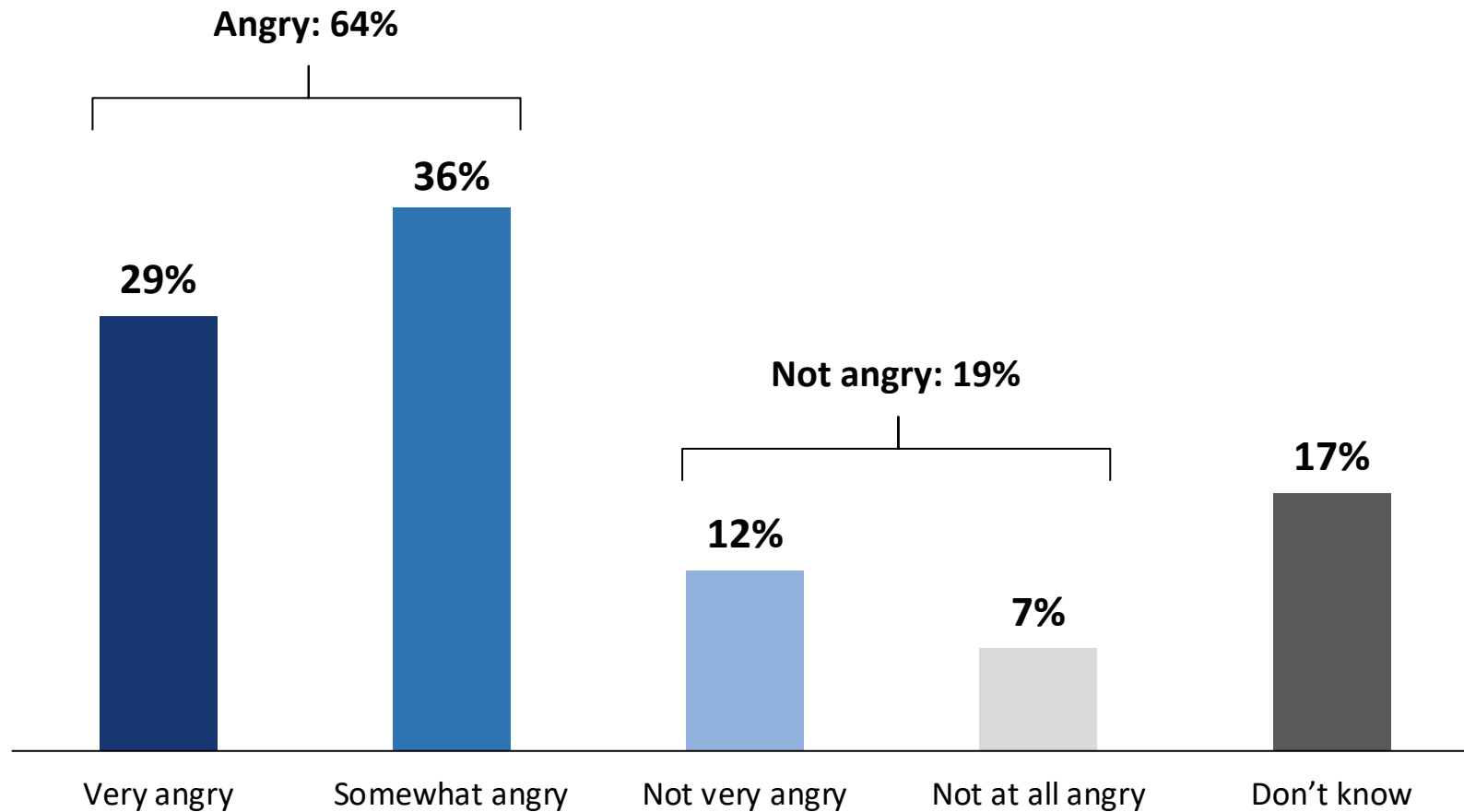
Segmentation
Respondents who say 'Angry'

Federal Party ID

Liberal	68%
Conservative	77%
NDP	57%
Green/Other	65%
Unaligned	51%

Region

BC	65%
AB	63%
Prairies	65%
ON	65%
QC	65%
Atlantic	63%

INNOVATIVE
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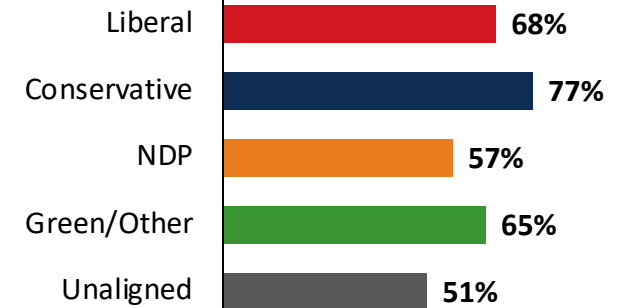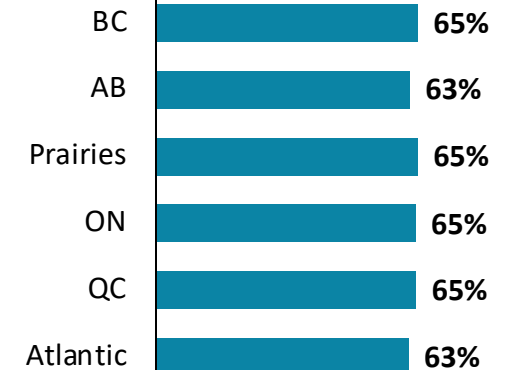
Government Reaction:

43% of respondents disapprove of the government's reaction; disapproval highest among Conservatives (73%)

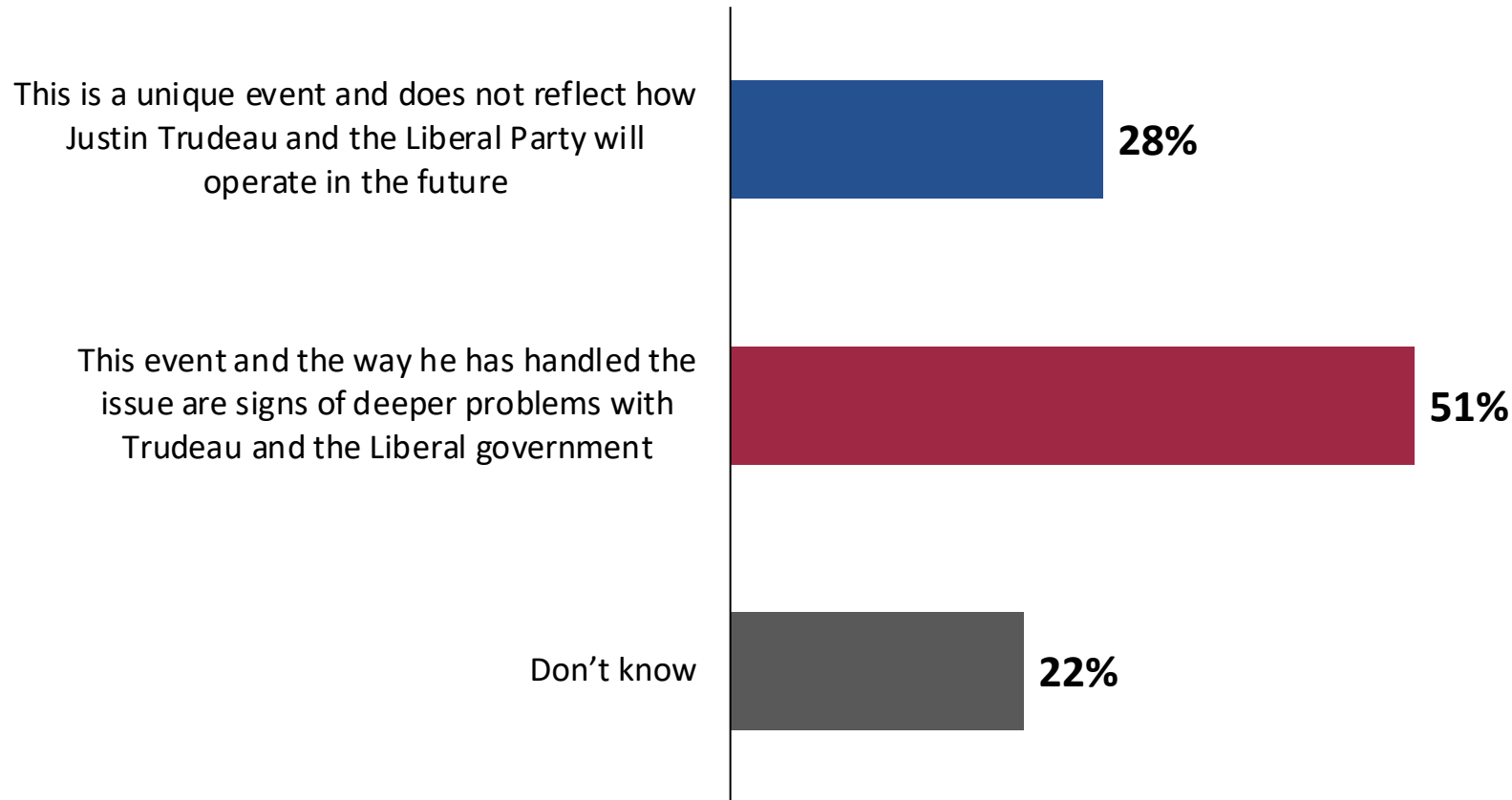**Q** Do you approve or disapprove of the way Justin Trudeau has handled the issue since it emerged?
[asked of all respondents, n=2,000]

Approve: 20%

Disapprove: 43%

Strongly approve	Somewhat approve	Neither approve nor disapprove	Somewhat disapprove	Strongly disapprove	Don't know
6%	14%	23%	16%	27%	14%

Segmentation
Respondents who say 'Disapprove'

Federal Party ID

Liberal	21%
Conservative	73%
NDP	32%
Green/Other	47%
Unaligned	41%

Region

BC	39%
AB	54%
Prairies	49%
ON	41%
QC	42%
Atlantic	42%

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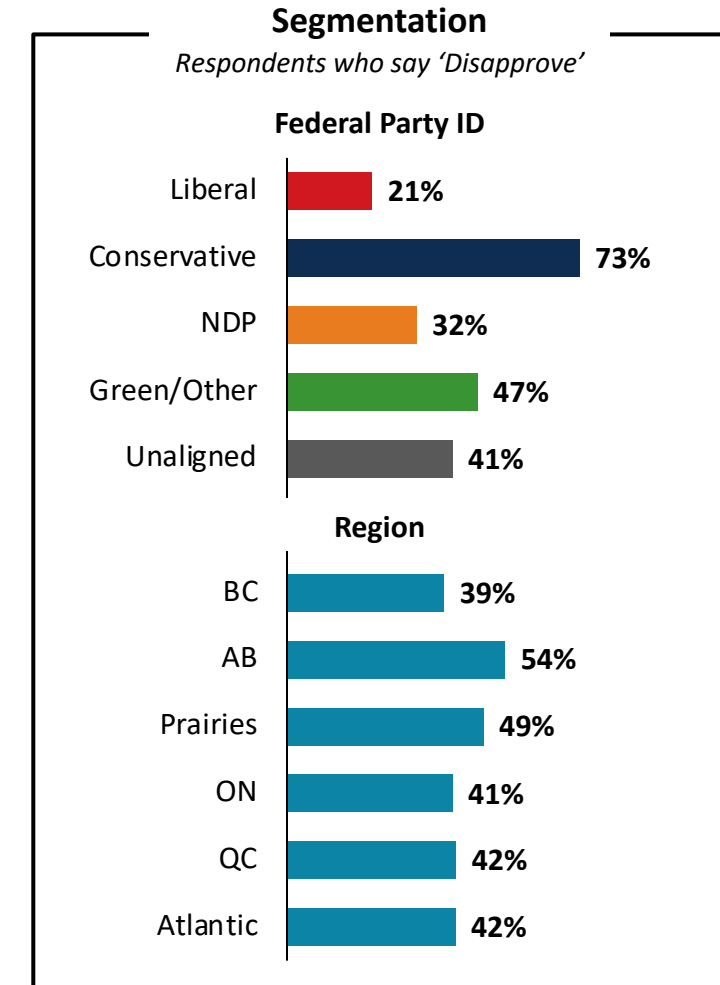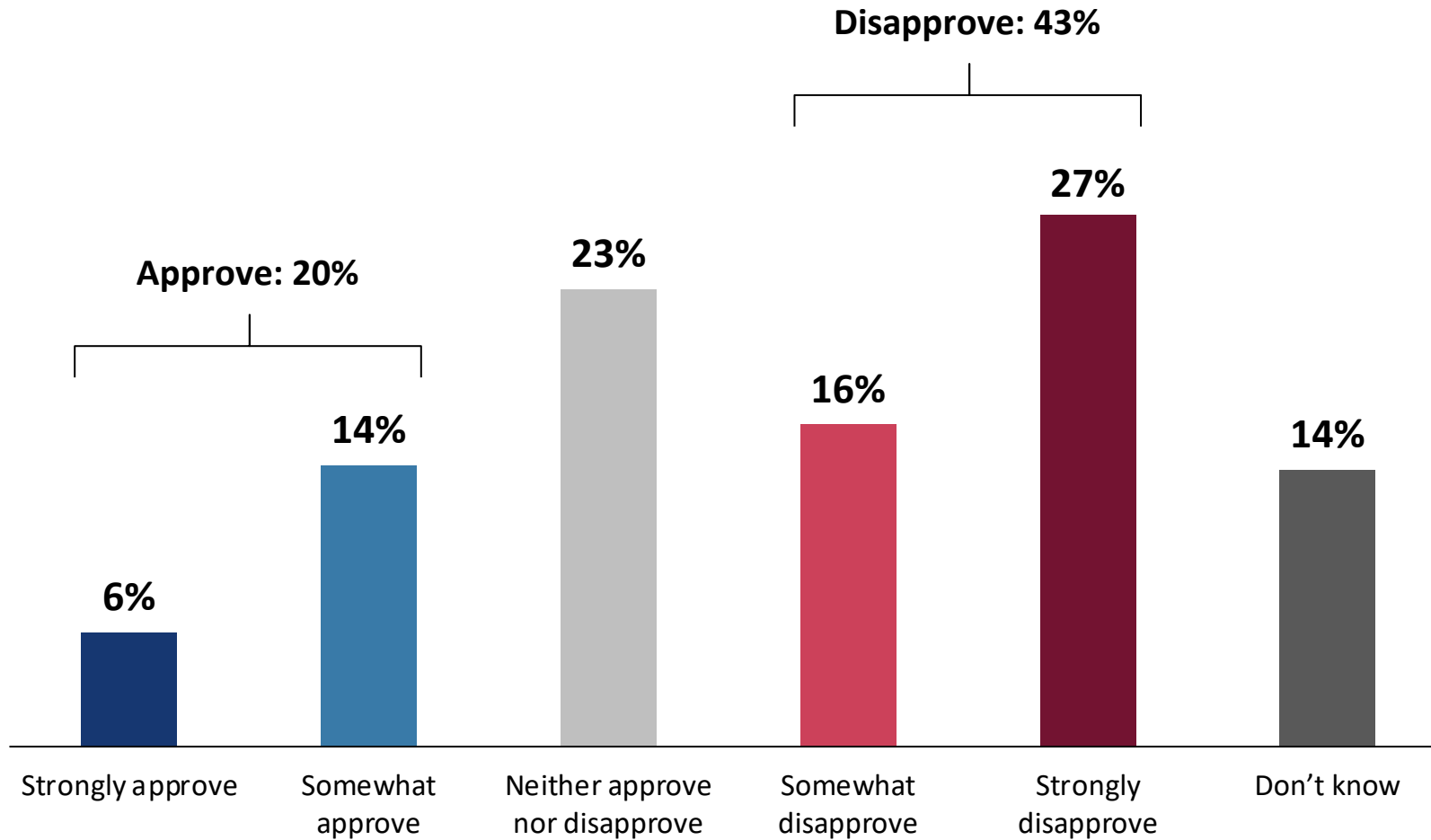
Systemic or Episodic:
Over half of the respondents believe that the way Trudeau has handled the issue is a sign of deeper problems

Q Which of the following comes closest to your point of view?
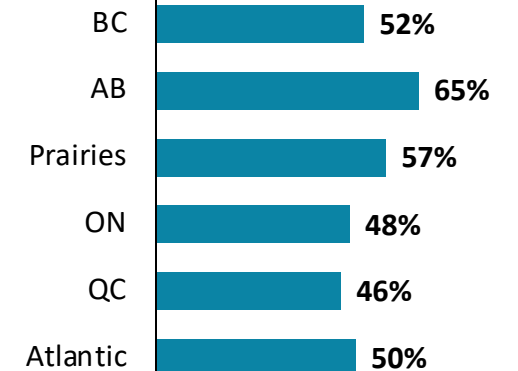[asked of all respondents, n=2,000]

This is a unique event and does not reflect how Justin Trudeau and the Liberal Party will operate in the future — **28%**

This event and the way he has handled the issue are signs of deeper problems with Trudeau and the Liberal government — **51%**

Don't know — **22%**

Segmentation
Respondents who say 'Signs of deeper problems'

Federal Party ID

Liberal	27%
Conservative	82%
NDP	45%
Green/Other	57%
Unaligned	45%

Region

BC	52%
AB	65%
Prairies	57%
ON	48%
QC	46%
Atlantic	50%

INNOVATIVE
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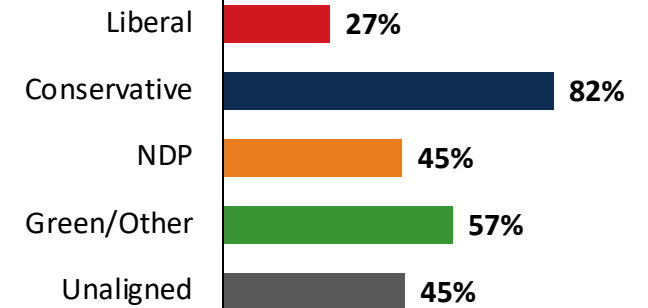
Party Leader NET Favourables Tracking:

Q Now we are going to provide you with several names of public figures. Please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. If you do not recognize the name, just indicate that.
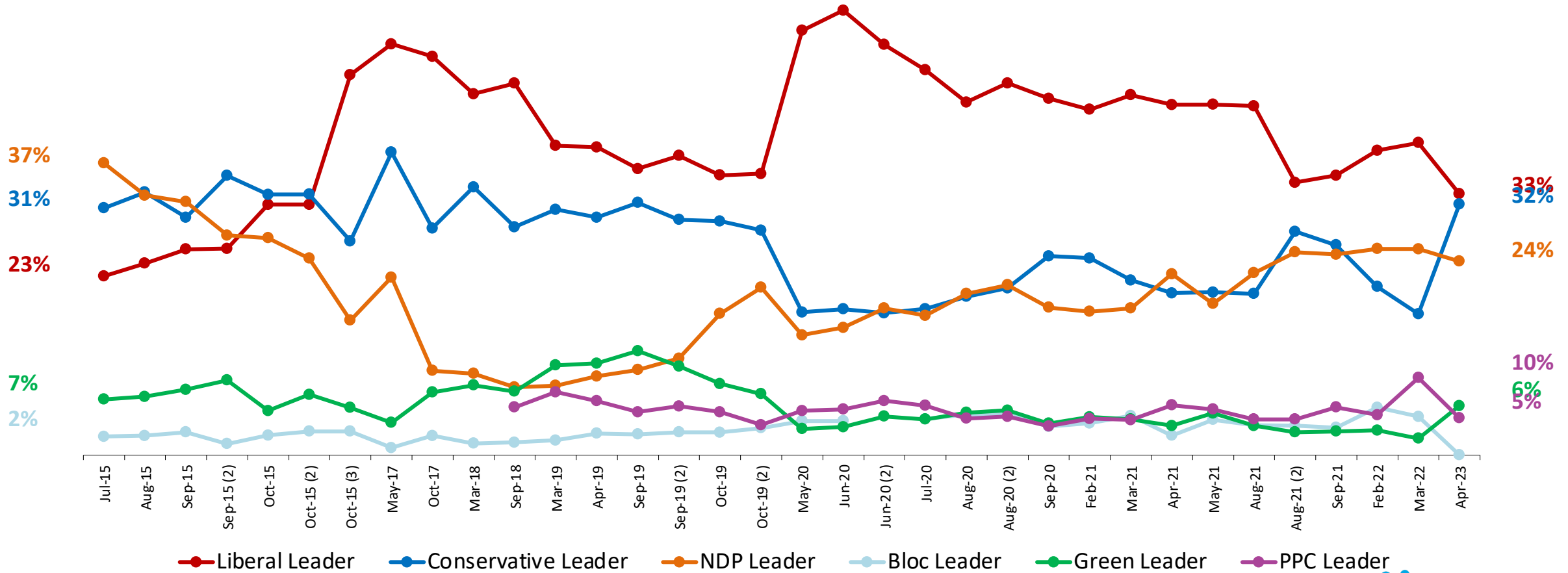[asked of all respondents; n=2000]

Legend: Liberal Leader · Conservative leader · NDP Leader · Bloc Leader
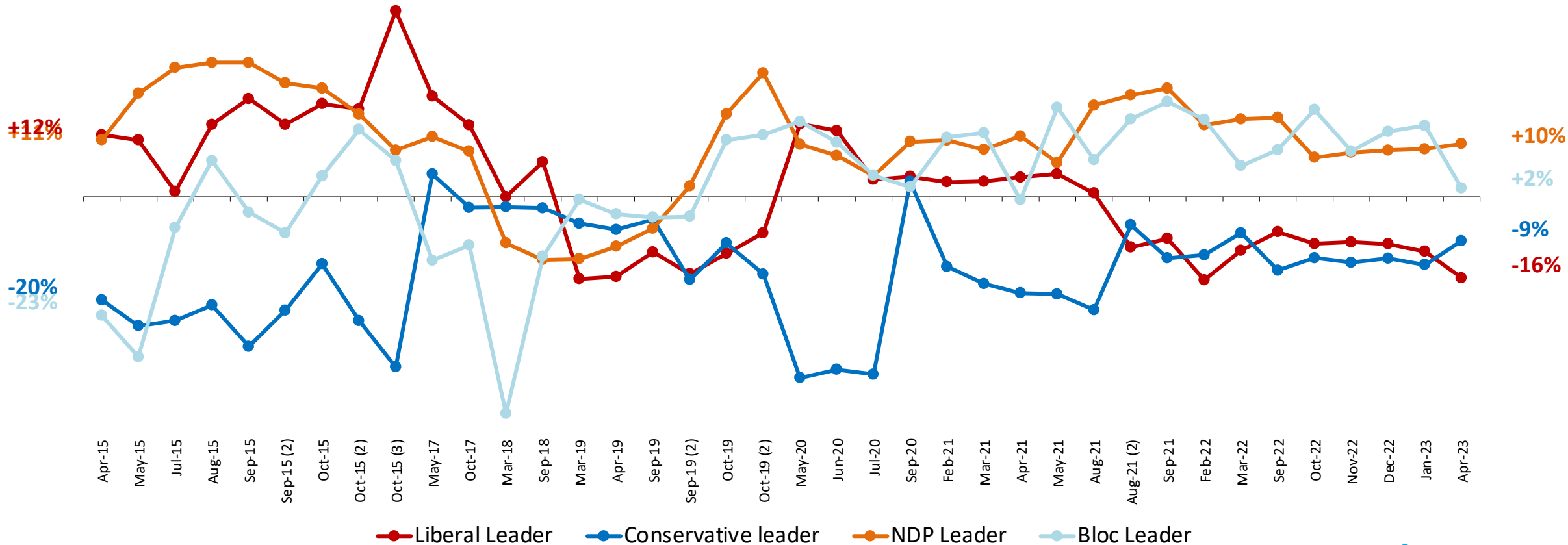
Best Prime Minister Tracking:

Q Which of the following party leaders would make the best Prime Minister of Canada?
[asked of all respondents; n=2000]

Liberal Leader · Conservative Leader · NDP Leader · Bloc Leader · Green Leader · PPC Leader
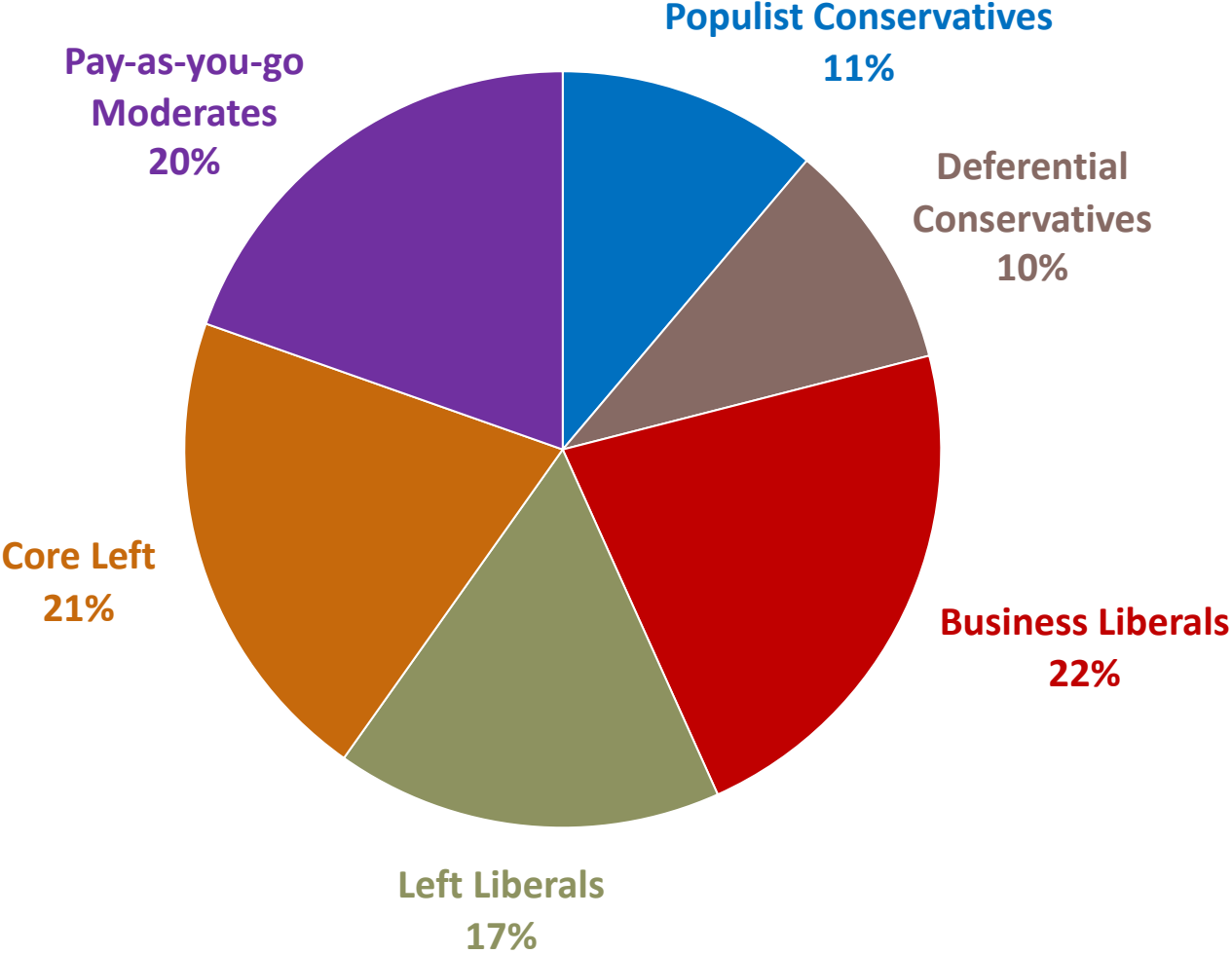
Current data: April 2023

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Value Clusters:

Q Clusters are based on 4 basic values: equal opportunity versus redistribution; trust in the profit system; whether spending should be based on ability to afford or public need; and whether government should listen to experts or common sense.
[asked of all respondents; n=2000]

Populist Conservatives 11%

Deferential Conservatives 10%

Business Liberals 22%

Left Liberals 17%

Core Left 21%

Pay-as-you-go Moderates 20%

Current data: April 2023

INNOVATIVE RESEARCH GROUP

Combined Vote by Value Cluster:

<table>
<tr><td colspan="7" align="center">Value Clusters</td></tr>
<tr>
<th></th>
<th>Populist Conservatives</th>
<th>Deferential Conservatives</th>
<th>Business Liberals</th>
<th>Left Liberals</th>
<th>Core Left</th>
<th>Pay-as-you-go Moderates</th>
</tr>
<tr>
<th></th>
<th>(N=223)</th>
<th>(N=197)</th>
<th>(N=445)</th>
<th>(N=331)</th>
<th>(N=412)</th>
<th>(N=392)</th>
</tr>
<tr>
<td>Conservative</td>
<td>61%</td><td>38%</td><td>27%</td><td>23%</td><td>13%</td><td>27%</td>
</tr>
<tr>
<td>Liberal</td>
<td>13%</td><td>26%</td><td>31%</td><td>32%</td><td>28%</td><td>22%</td>
</tr>
<tr>
<td>NDP</td>
<td>5%</td><td>10%</td><td>16%</td><td>19%</td><td>33%</td><td>13%</td>
</tr>
<tr>
<td>Bloc</td>
<td>2%</td><td>7%</td><td>7%</td><td>3%</td><td>5%</td><td>4%</td>
</tr>
<tr>
<td>Green</td>
<td>2%</td><td>4%</td><td>4%</td><td>5%</td><td>8%</td><td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td><td>4%</td><td>5%</td><td>4%</td><td>3%</td><td>6%</td>
</tr>
<tr>
<td>Undecided DK</td>
<td>10%</td><td>8%</td><td>9%</td><td>11%</td><td>8%</td><td>18%</td>
</tr>
<tr>
<td>Would not vote/None</td>
<td>1%</td><td>2%</td><td>2%</td><td>3%</td><td>3%</td><td>4%</td>
</tr>
</table>

Federal Combined Vote

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Value Cluster by Region:

Region

	BC	AB	Prairies	ON	QC	Atlantic
	(N=277)	(N=221)	(N=128)	(N=775)	(N=464)	(N=134)
Populist Conservatives	14%	17%	11%	10%	9%	10%
Deferential Conservatives	8%	11%	5%	9%	13%	10%
Business Liberals	22%	18%	24%	20%	28%	21%
Left Liberals	15%	15%	21%	20%	11%	17%
Core Left	22%	18%	18%	20%	22%	25%
Pay-as-you-go Moderates	19%	21%	20%	20%	18%	18%

Value Clusters

Note: Current data: April 2023

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Alberta Politics

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Provincial Decided Vote Tracking: UCP and NDP vote share continues to converge since last month

Q If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[DECIDED]**
[only decided voters; n=1,324]

Legend:
- Liberal
- United Conservative Party
- NDP
- Green
- Alberta Party
- Progressive Conservative
- Wildrose Alliance
- Other
- Wildrose Independent Party
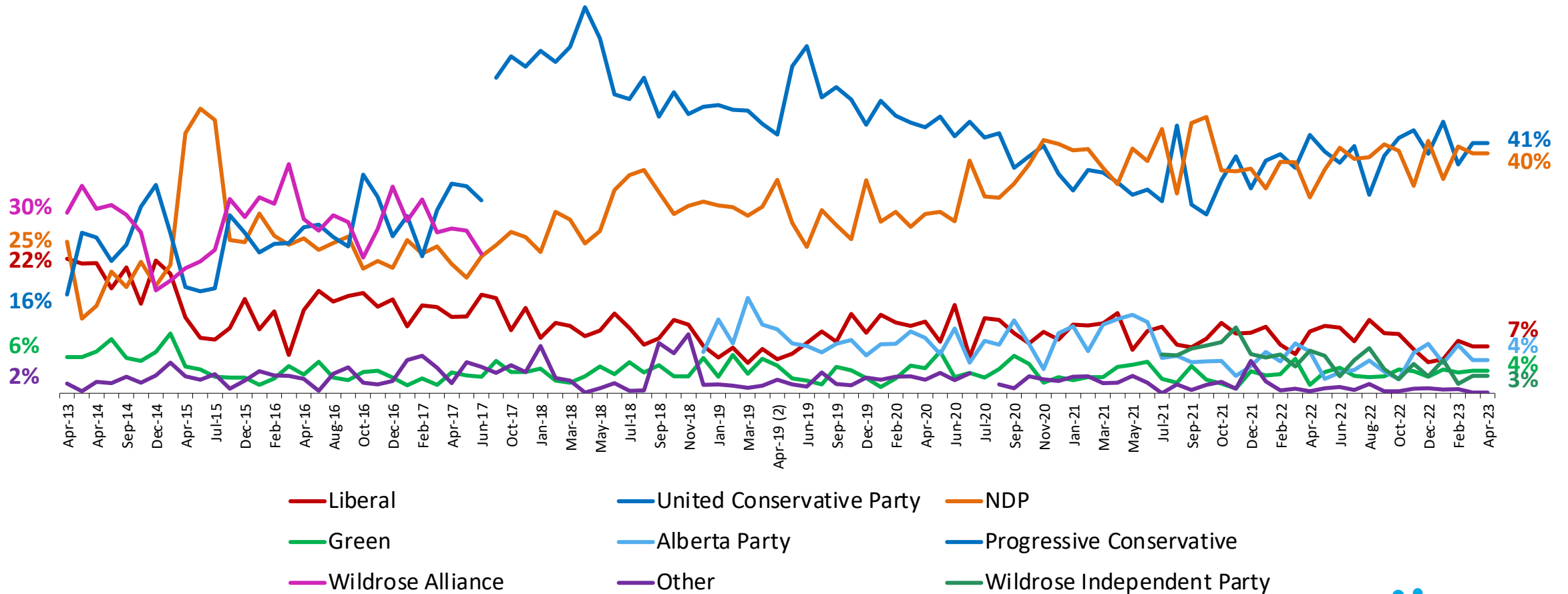
Note: In April 2023, half the respondents were shown both the party and party leader name, while the other half were just shown the party name.
Current data: April 2023

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Combined Vote by Value Clusters: Populist Conservatives, Deferential Conservatives, and Business Liberals most likely to vote UPC

Value Clusters

Provincial Combined Vote	Populist Conservatives (N=221)	Deferential Conservatives (N=104)	Business Liberals (N=379)	Left Liberals (N=292)	Core Left (N=242)	Thrifty Moderates (N=263)
UCP	71%	40%	40%	25%	14%	32%
NDP	10%	32%	34%	43%	62%	27%
Liberal	4%	8%	5%	7%	5%	10%
Alberta Party	4%	6%	4%	4%	1%	5%
Wildrose Independent	3%	4%	5%	2%	1%	2%
Green	1%	1%	4%	5%	6%	2%
Other	<1%	-	-	-	<1%	1%
Undecided/DK	6%	9%	7%	11%	8%	18%
WNV/None	1%	1%	1%	3%	1%	4%

Note: Current data: April 2023

Alberta Riding Segmentation

We have also grouped respondents by provincial electoral district.

Districts are grouped into **4 clusters** based how the governing United Conservative Party performed in the 2019 Alberta Election. Each of these clusters is listed below with the sample size of respondents in each. As of the last election, the UCP have 63 seats, and the NDP have 24.

Edmonton

Calgary

Legend

Alberta Provincial Electoral Districts
- UCP Loss (Lost by >10%)
- Swing (margin within 10%)
- UCP Solid (Won by >10%)
- UCP Safe (Won by >35%)
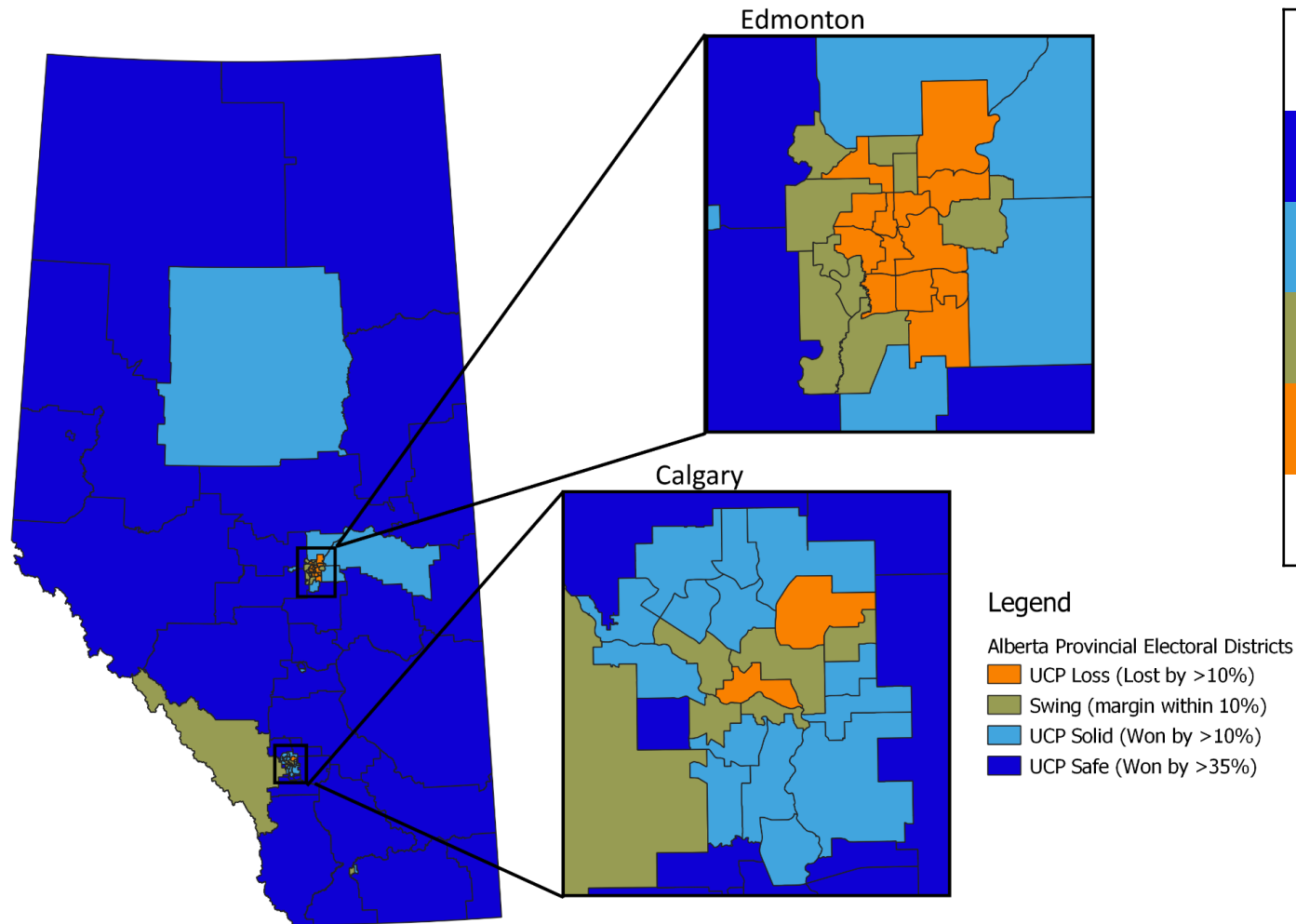
	Unweighted (n)	Weighted (n)	Weighted %
UCP Safe	530	513	34.2%
UCP Solid	374	380	25.4%
Swing	313	295	19.7%
UCP Loss	291	312	20.8%
Total	**n=1,508**	**n=1,500**	**100%**

INNOVATIVE RESEARCH GROUP

Vote by Riding Segments

In Canadian elections, we count seats, not votes. To understand the race to secure a majority of seats, we have grouped the results in seat clusters based on the closeness of the 2019 results. The UCP hold a strong lead in 34 "Safe UCP" seats. The NDP should hold all the 15 "UCP Losses". The NDP currently hold an 8-point lead in Swing ridings and could win all 16 2019 "Swing" seats. The election will depend on the 22 "UCP Solid" seats. 14 are in Calgary, 5 on Edmonton's outskirts and 3 are rural.
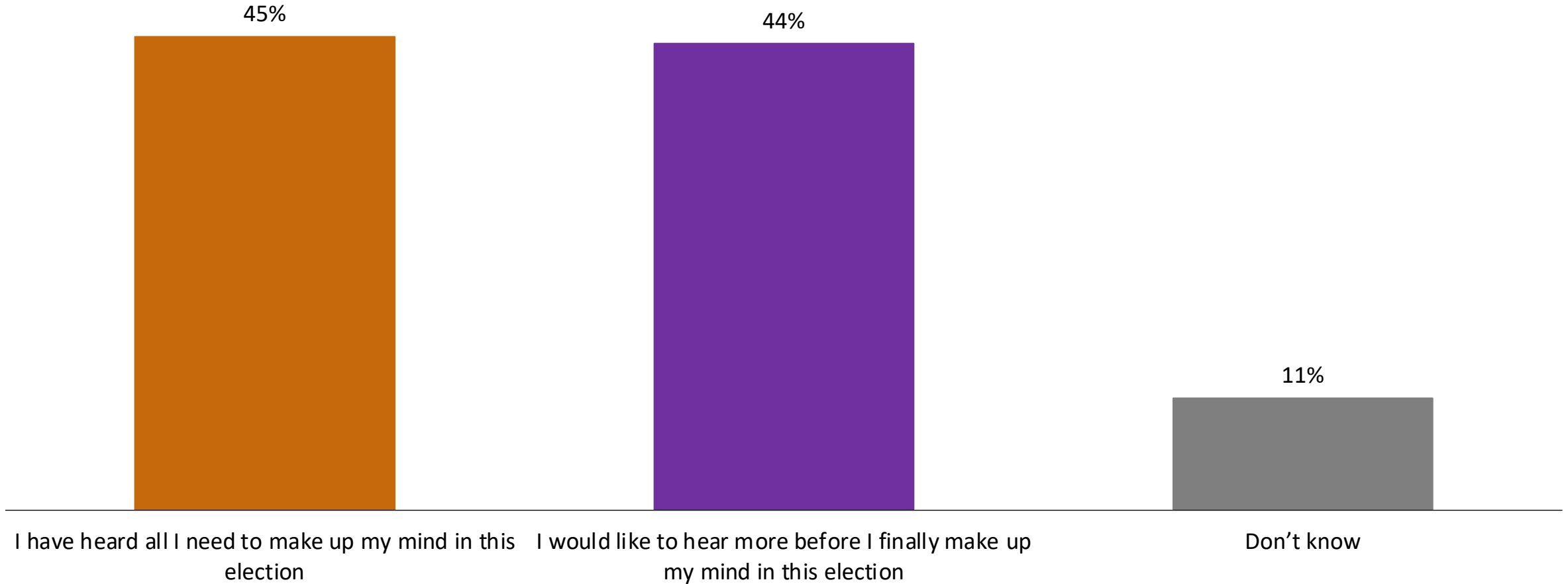
		UCP	NDP	UCP-NDP Margin	
Overall	**2019 Result**	55%	33%	**+22%**	**21-point swing**
	2023 Poll	41%	40%	**+1%**	
UCP Safe (2019 Margin > 35%) 34 seats	**2019 Result**	70%	19%	**+51%**	
	2023 Poll	51%	31%	**+21%**	
UCP Solid (2019 Margin 10-35%) 22 seats	**2019 Result**	55%	32%	**+23%**	**28-point swing**
	2023 Poll	39%	43%	**-5%**	
Swing (2019 Margin within 10%) 16 seats	**2019 Result**	43%	44%	**-2%**	
	2023 Poll	36%	44%	**-8%**	
UCP Loss (2019 Loss by >10%) 15 seats	**2019 Result**	32%	55%	**-23%**	
	2023 Poll	32%	47%	**-16%**	

Satisficing: Albertans are split on whether they've made up they're minds about the upcoming election

Q Which statement is closest to your view about the upcoming provincial election?
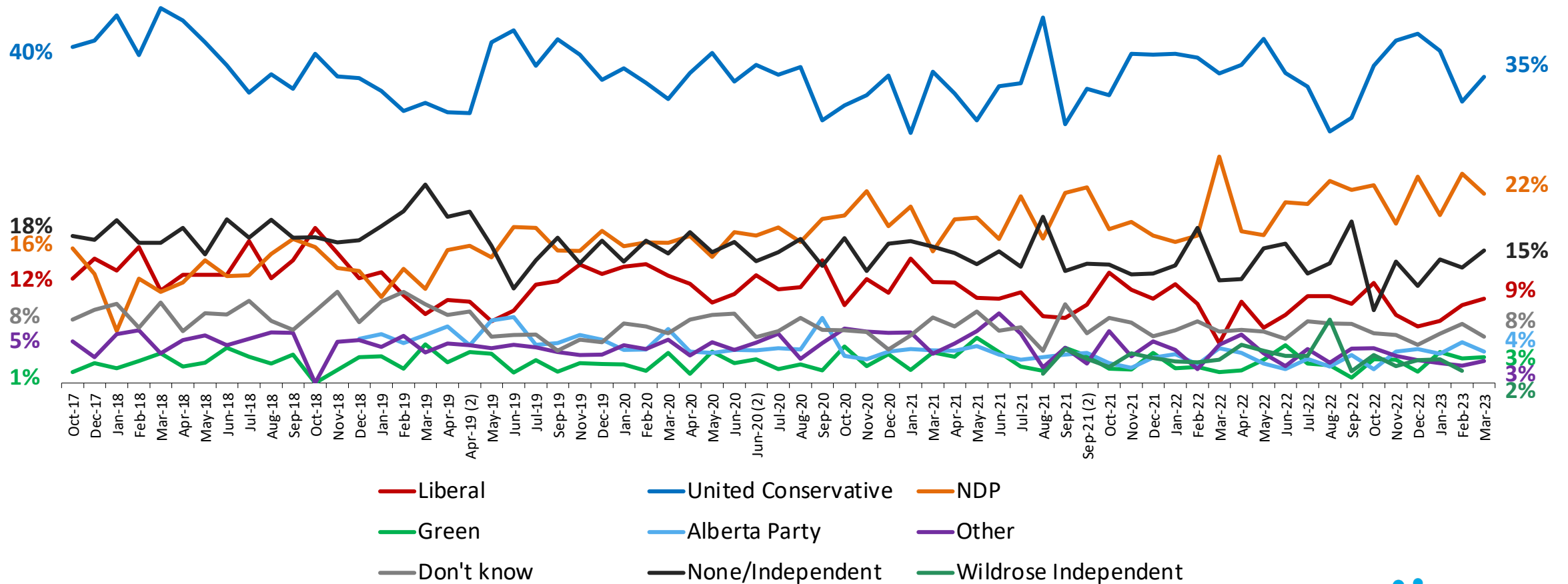[asked of all respondents; n=1,500]

I have heard all I need to make up my mind in this election	I would like to hear more before I finally make up my mind in this election	Don't know
45%	44%	11%

Current data: April 2023

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Provincial Party ID Tracking: All UCP needs to do to win is rally people who feel UCP, NDP need defectors

Q Thinking about politics in Alberta, generally speaking, do you usually think of yourself as a…
[asked of all respondents; n=1,500]

Legend: Liberal, United Conservative, NDP, Green, Alberta Party, Other, Don't know, None/Independent, Wildrose Independent

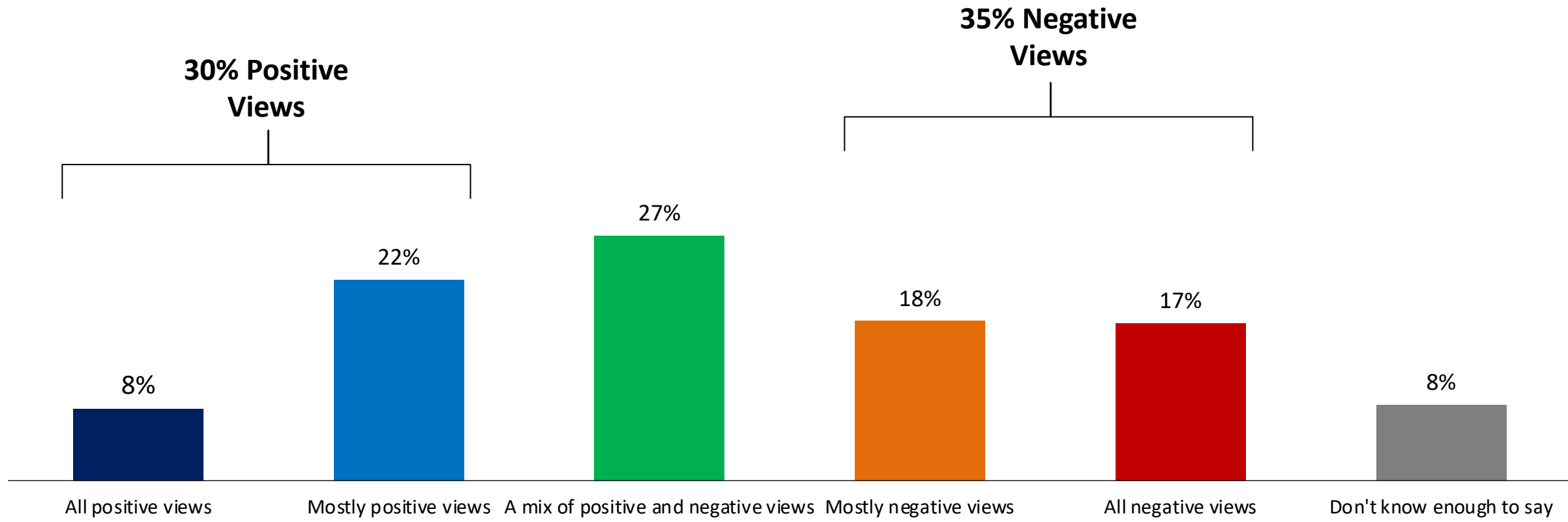Current data: April 2023

INNOVATIVE RESEARCH GROUP

United Conservative Views: More have negative (35%) view of UCP than positive (30%); 1-in-3 have a mix of opinions or don't know

Q Thinking about the **United Conservative Party**, please indicate if you have all positive, mostly positive, some positive and some negative, mostly negative, or all negative views of that party. If you don't know enough about the party to say, please indicate that.
[asked of all respondents; n=1,500]

30% Positive Views

35% Negative Views

All positive views	Mostly positive views	A mix of positive and negative views	Mostly negative views	All negative views	Don't know enough to say
8%	22%	27%	18%	17%	8%

INNOVATIVE
RESEARCH GROUP

NDP Views: More have positive (33%) view of NDP than negative (28%); 2-in-5 have a mix of opinions or don't know

Q Thinking about the **Alberta New Democratic Party**, please indicate if you have all positive, mostly positive, some positive and some negative, mostly negative, or all negative views of that party. If you don't know enough about the party to say, please indicate that.
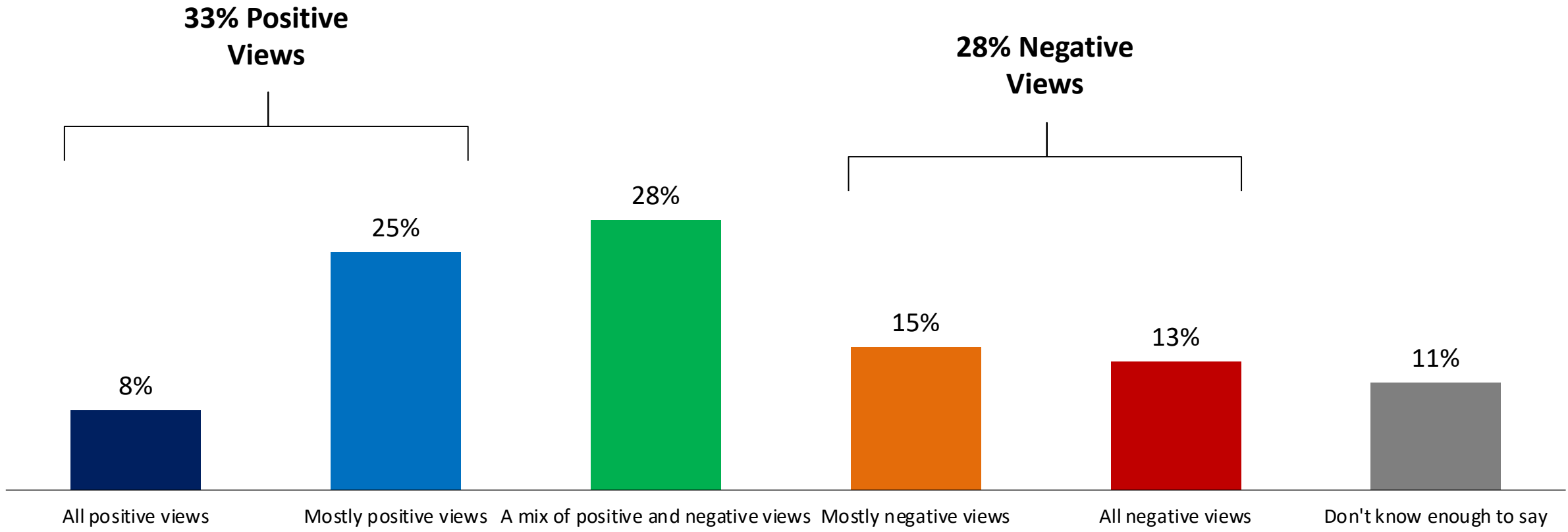[asked of all respondents; n=1,500]

33% Positive Views

28% Negative Views

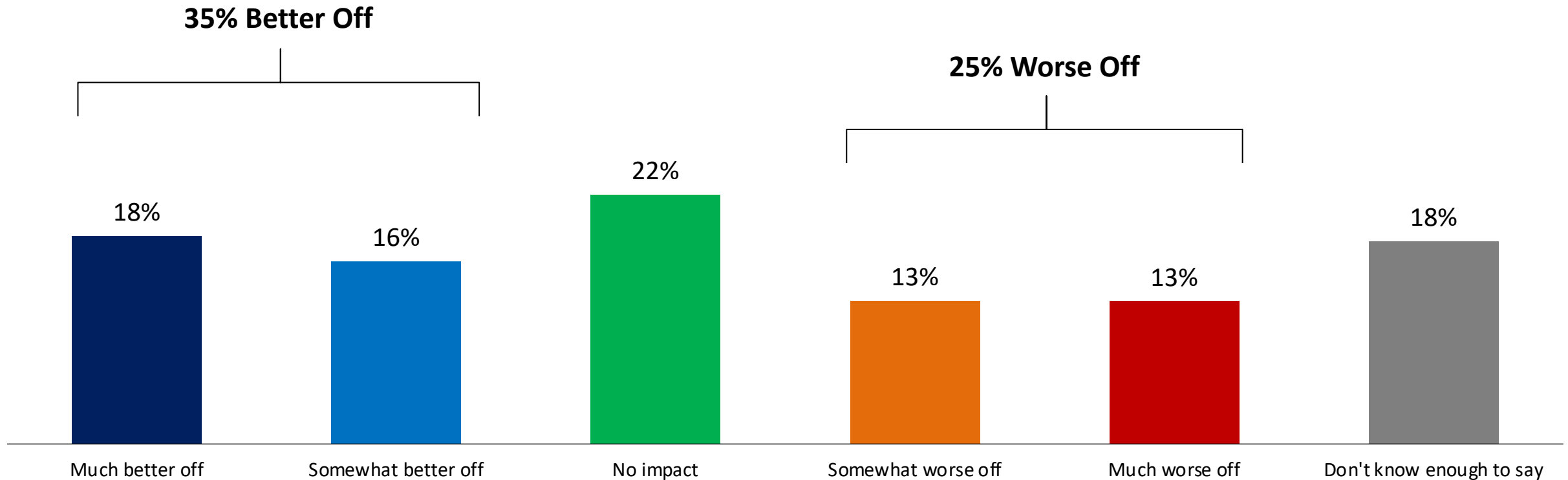| All positive views	Mostly positive views	A mix of positive and negative views	Mostly negative views	All negative views	Don't know enough to say
8%	25%	28%	15%	13%	11%

INNOVATIVE
RESEARCH GROUP

UCP Brand Promise: More think they will be better off than worse under UCP; 2-in-5 think it will have no impact or don't know

Q If the **United Conservative Party** were to form the next government or hold the balance of power in a minority government, do you think *you personally* would be better off or worse off?
[asked of all respondents; n=1,500]

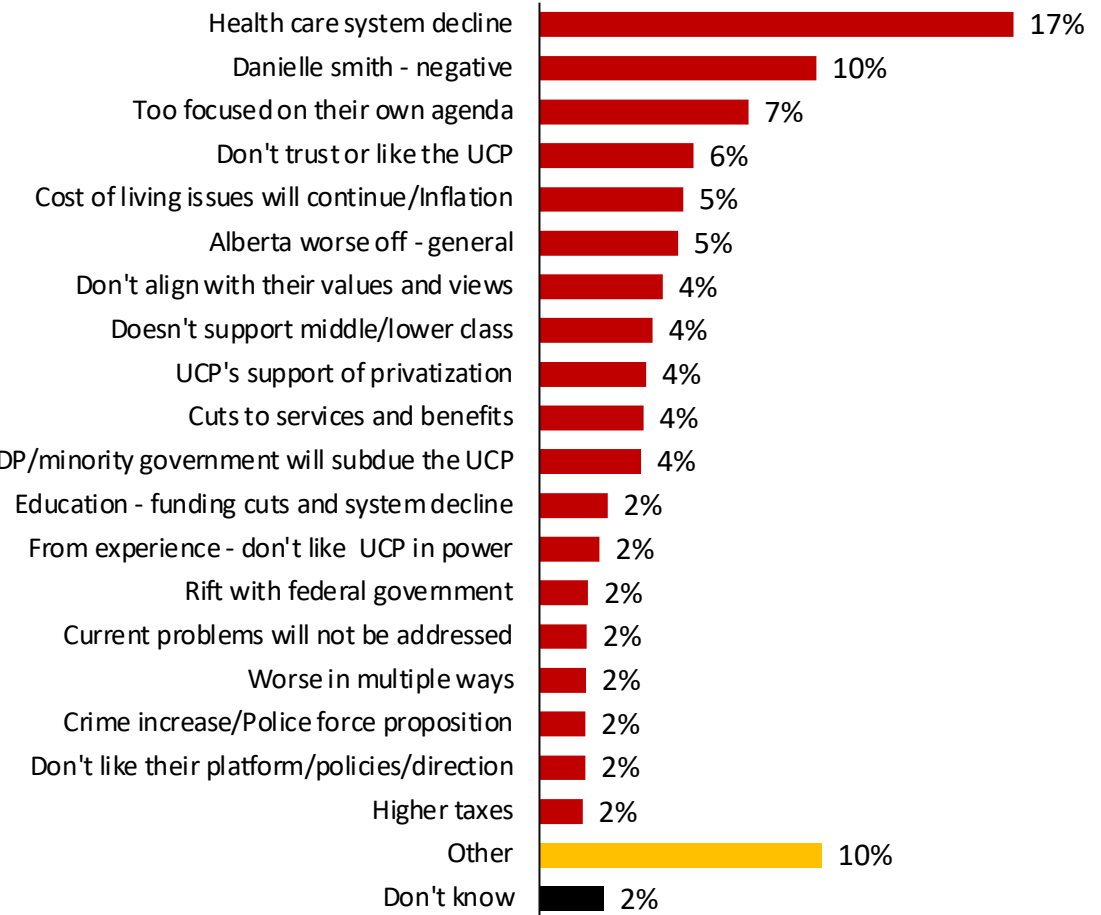**35% Better Off**

25% Worse Off

Much better off	Somewhat better off	No impact	Somewhat worse off	Much worse off	Don't know enough to say
18%	16%	22%	13%	13%	18%

INNOVATIVE
RESEARCH GROUP

Impacts of UCP: Healthcare decline the top reason why people think they will be worse off under UCP and better economy for "better off"
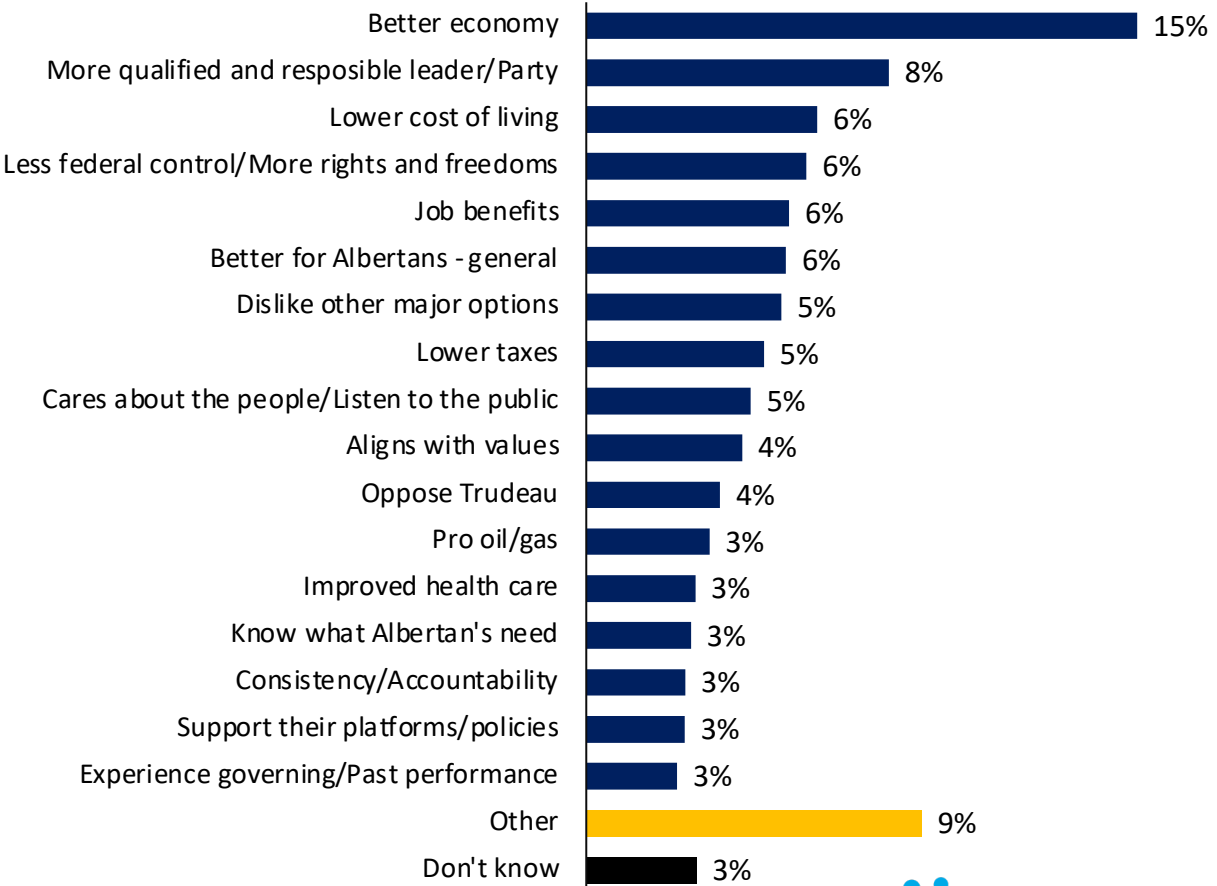
Q And how do you think you would be worse off?
[asked of respondents who say worse off; n=686]

Category	%
Health care system decline	17%
Danielle smith - negative	10%
Too focused on their own agenda	7%
Don't trust or like the UCP	6%
Cost of living issues will continue/Inflation	5%
Alberta worse off - general	5%
Don't align with their values and views	4%
Doesn't support middle/lower class	4%
UCP's support of privatization	4%
Cuts to services and benefits	4%
NDP/minority government will subdue the UCP	4%
Education - funding cuts and system decline	2%
From experience - don't like UCP in power	2%
Rift with federal government	2%
Current problems will not be addressed	2%
Worse in multiple ways	2%
Crime increase/Police force proposition	2%
Don't like their platform/policies/direction	2%
Higher taxes	2%
Other	10%
Don't know	2%

Q And how do you think you would be better off?
[asked of respondents who say better off; n=686]

Category	%
Better economy	15%
More qualified and resposible leader/Party	8%
Lower cost of living	6%
Less federal control/More rights and freedoms	6%
Job benefits	6%
Better for Albertans - general	6%
Dislike other major options	5%
Lower taxes	5%
Cares about the people/Listen to the public	5%
Aligns with values	4%
Oppose Trudeau	4%
Pro oil/gas	3%
Improved health care	3%
Know what Albertan's need	3%
Consistency/Accountability	3%
Support their platforms/policies	3%
Experience governing/Past performance	3%
Other	9%
Don't know	3%

INNOVATIVE RESEARCH GROUP
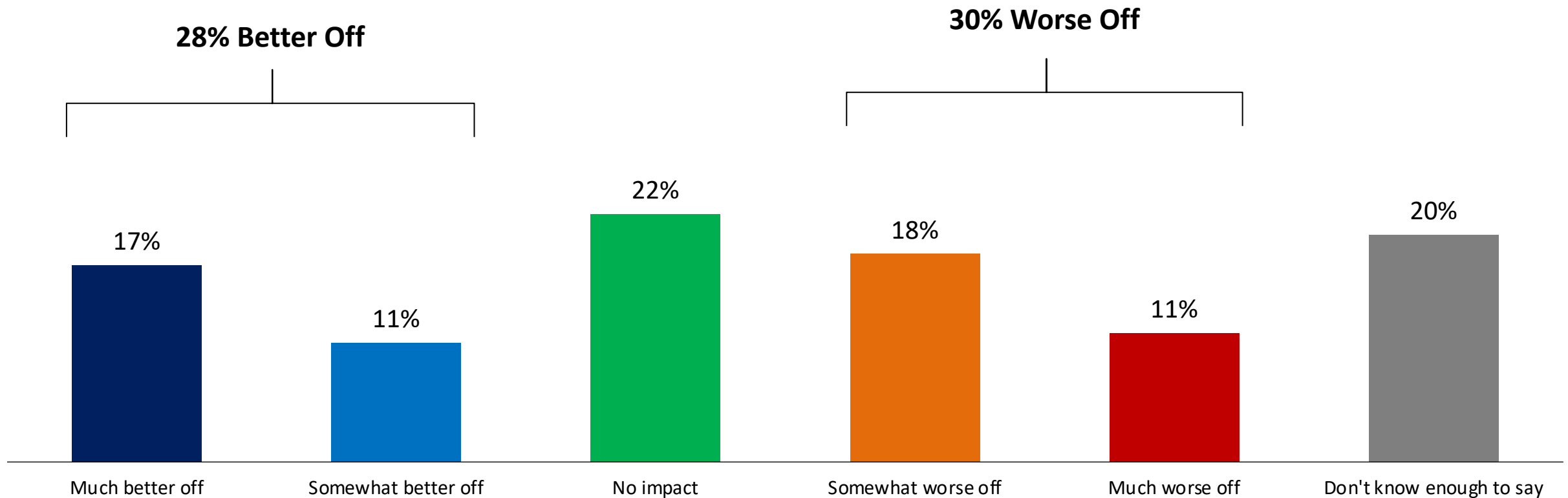
NDP Brand Promise: Respondents are split on their opinion about personal impact; 2-in-5 think it will have no impact or don't know

28% Better Off

30% Worse Off

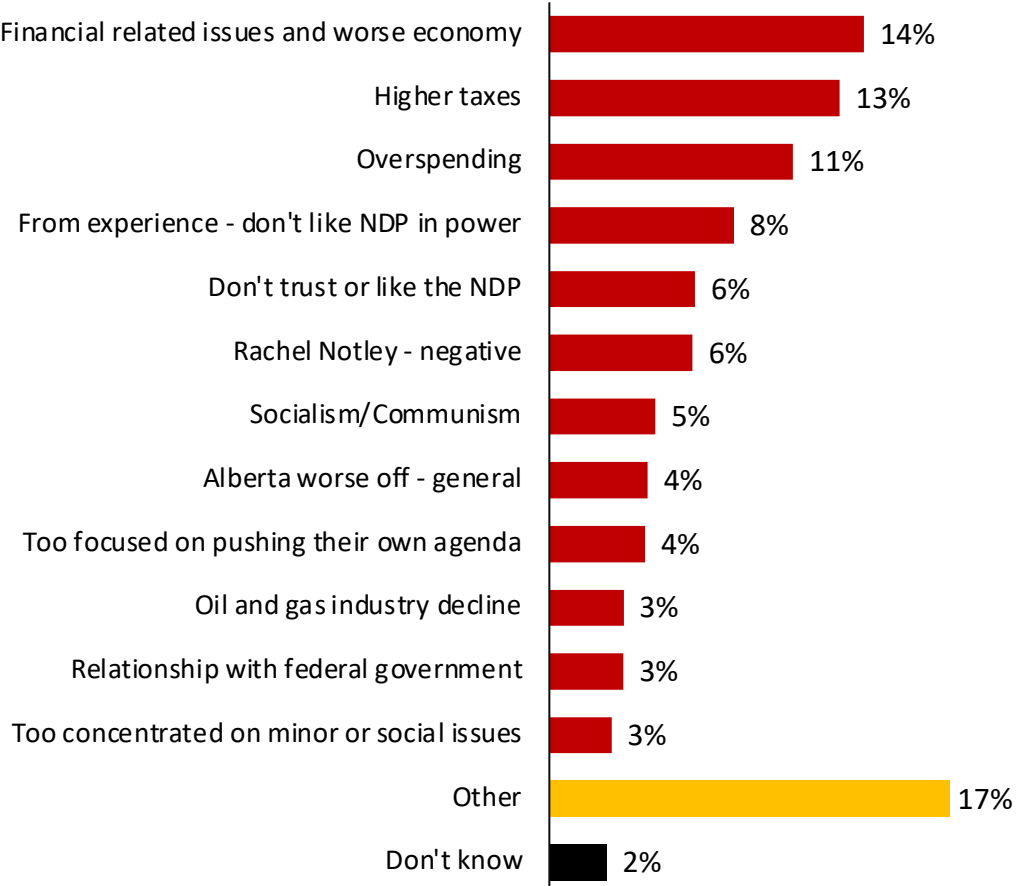| Much better off	Somewhat better off	No impact	Somewhat worse off	Much worse off	Don't know enough to say
17%	11%	22%	18%	11%	20%

INNOVATIVE
RESEARCH GROUP

Impacts of NDP: Worse economy is the top reason why people think they will be worse off and improved healthcare for "better off"

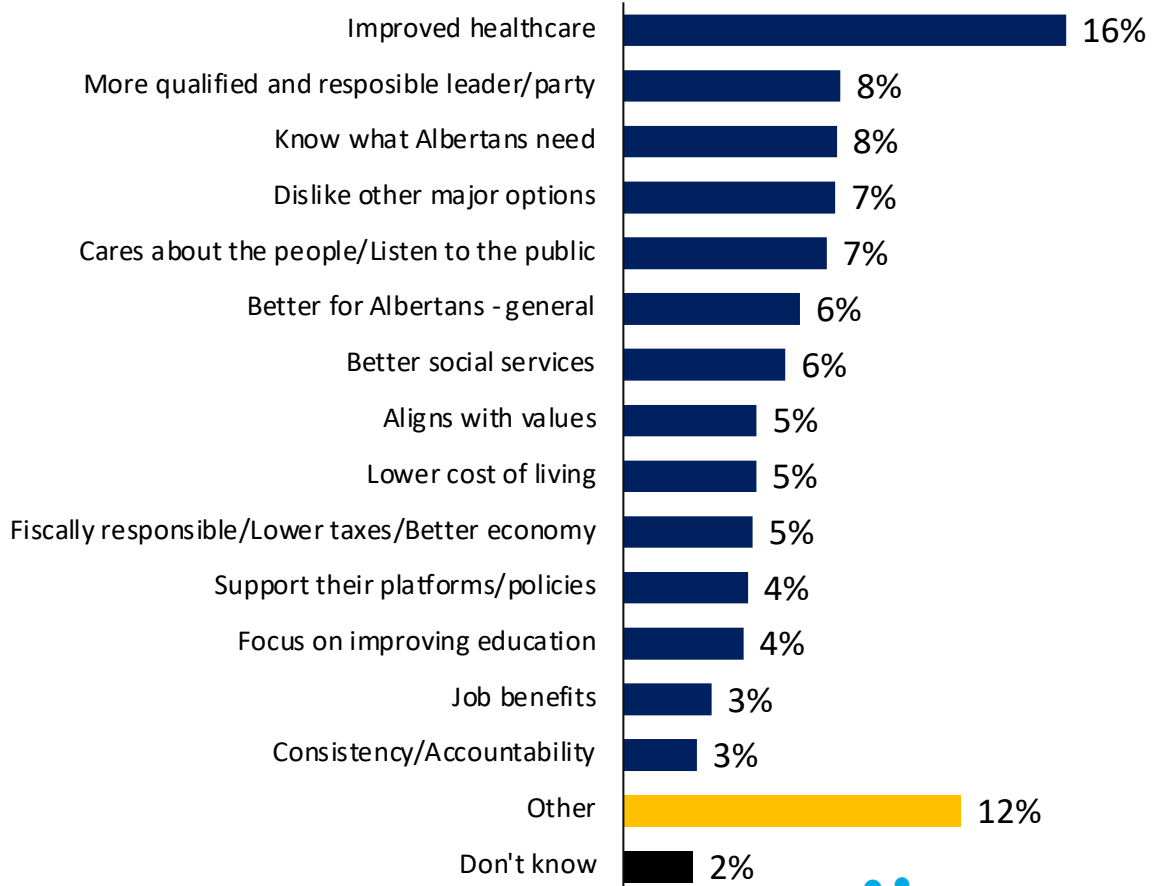**Q** And how do you think you would be worse off?
[asked of respondents who say worse off; n=420]

Reason	%
Financial related issues and worse economy	14%
Higher taxes	13%
Overspending	11%
From experience - don't like NDP in power	8%
Don't trust or like the NDP	6%
Rachel Notley - negative	6%
Socialism/Communism	5%
Alberta worse off - general	4%
Too focused on pushing their own agenda	4%
Oil and gas industry decline	3%
Relationship with federal government	3%
Too concentrated on minor or social issues	3%
Other	17%
Don't know	2%

Q And how do you think you would be better off?
[asked of respondents who say better off; n=448]

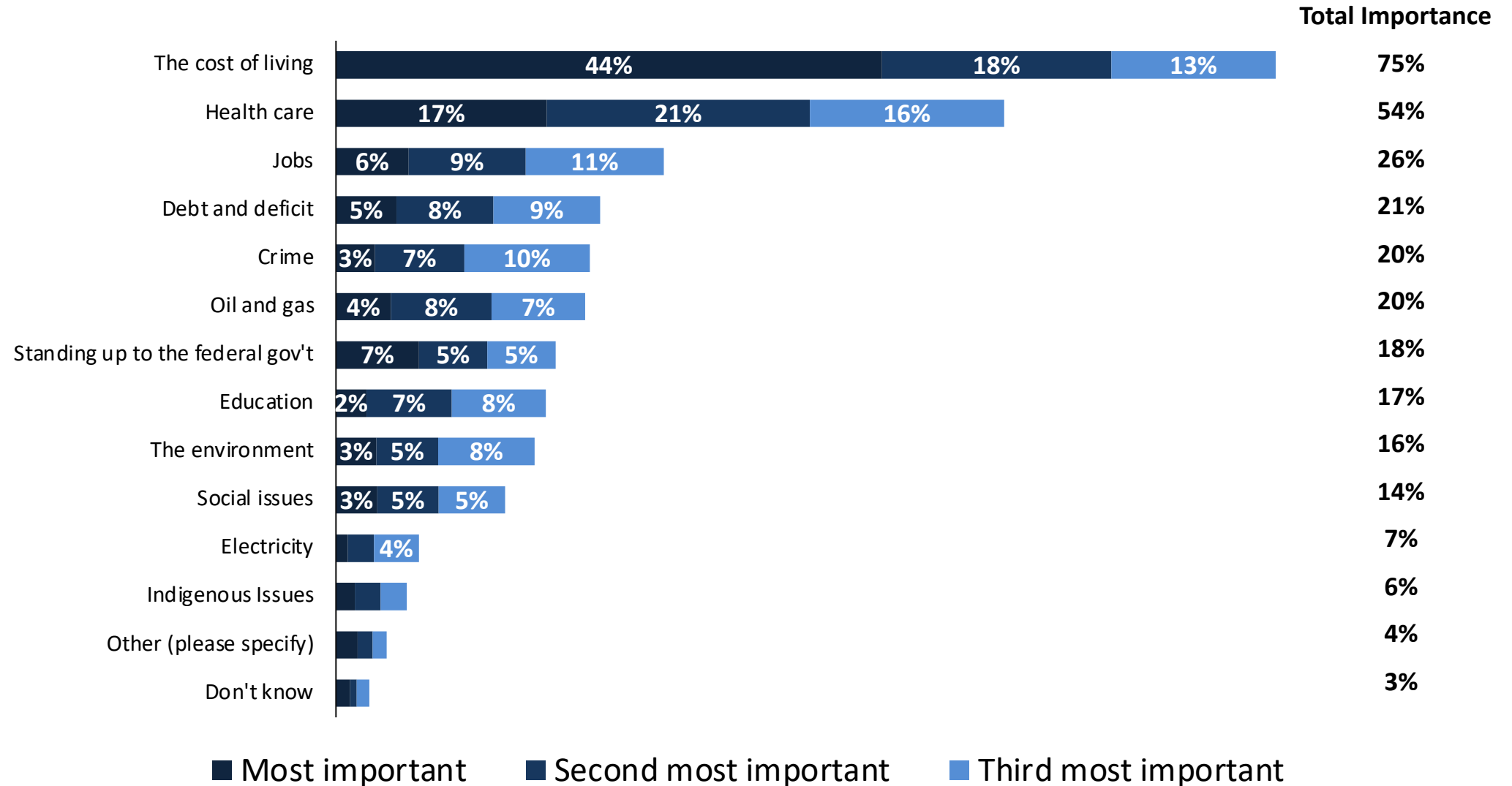| Reason	%
Improved healthcare	16%
More qualified and resposible leader/party	8%
Know what Albertans need	8%
Dislike other major options	7%
Cares about the people/Listen to the public	7%
Better for Albertans - general	6%
Better social services	6%
Aligns with values	5%
Lower cost of living	5%
Fiscally responsible/Lower taxes/Better economy	5%
Support their platforms/policies	4%
Focus on improving education	4%
Job benefits	3%
Consistency/Accountability	3%
Other	12%
Don't know	2%

INNOVATIVE RESEARCH GROUP

Provincial Issues: The cost of living is by far the most important issue, followed by health care and jobs

Q **Which of the following issues is most important issue to you? And which of these issues is the next most important to you?**
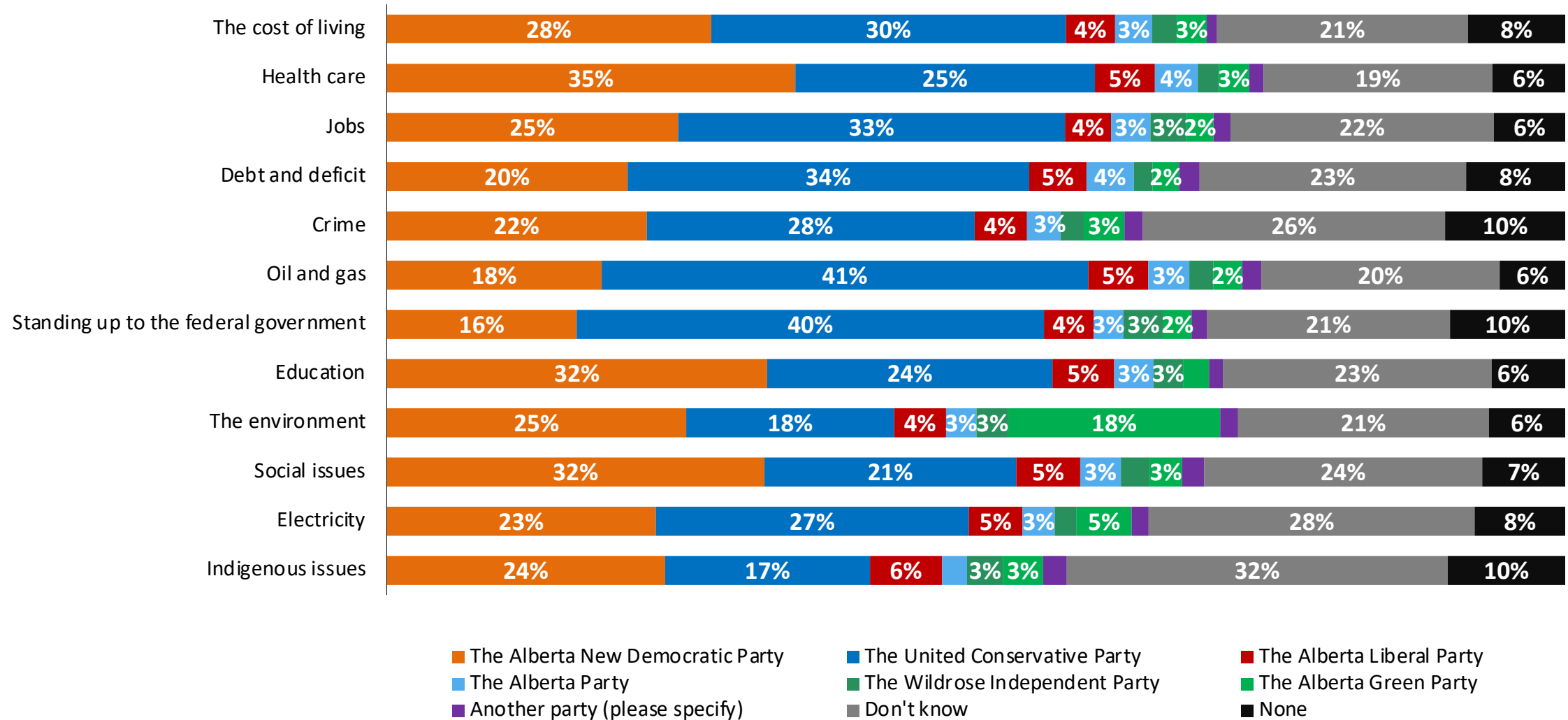[asked of all respondents; n=1,500]

Total Importance

Issue	Most important	Second most important	Third most important	Total Importance
The cost of living	44%	18%	13%	**75%**
Health care	17%	21%	16%	**54%**
Jobs	6%	9%	11%	**26%**
Debt and deficit	5%	8%	9%	**21%**
Crime	3%	7%	10%	**20%**
Oil and gas	4%	8%	7%	**20%**
Standing up to the federal gov't	7%	5%	5%	**18%**
Education	2%	7%	8%	**17%**
The environment	3%	5%	8%	**16%**
Social issues	3%	5%	5%	**14%**
Electricity			4%	**7%**
Indigenous Issues				**6%**
Other (please specify)				**4%**
Don't know				**3%**

■ Most important   ■ Second most important   ■ Third most important

Best Party on Issue: NDP or UCP considered to be the best fits for dealing with following issues

Q For each of the following issues, please indicate which party you think would do the best job of dealing with that issue or if you think none of the parties would do a good job on that issue.
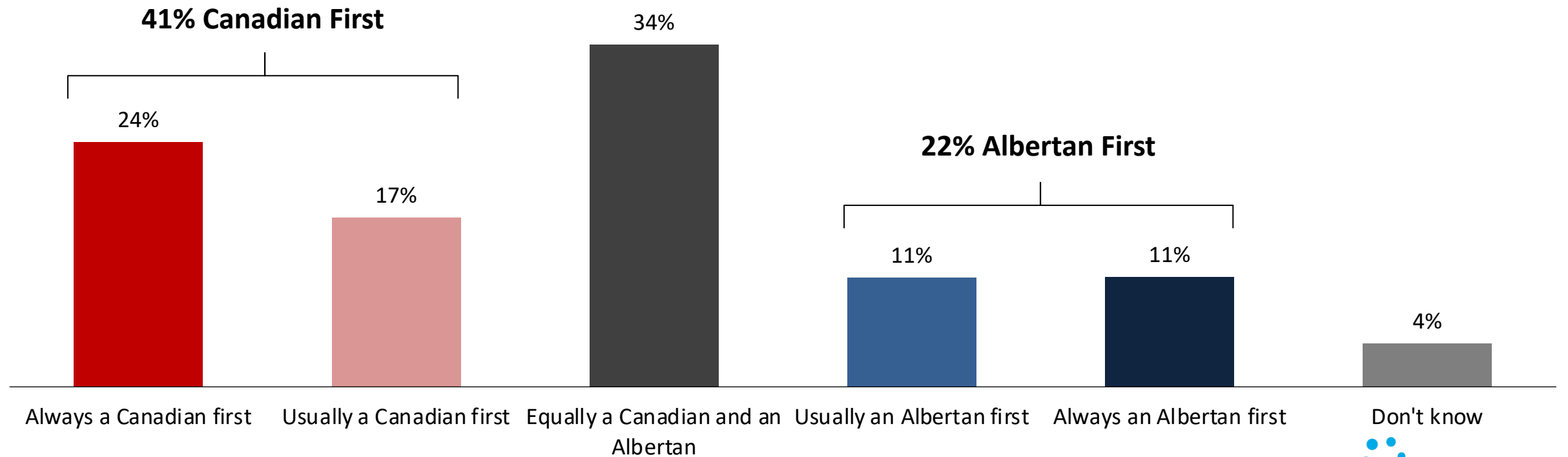[asked of all respondents; n=1,500]

Issue	ANDP	UCP	Liberal	AB Party	Wildrose	Green	Another	Don't know	None
The cost of living	28%	30%	4%	3%		3%		21%	8%
Health care	35%	25%	5%	4%		3%		19%	6%
Jobs	25%	33%	4%	3%	3%	2%		22%	6%
Debt and deficit	20%	34%	5%	4%		2%		23%	8%
Crime	22%	28%	4%	3%		3%		26%	10%
Oil and gas	18%	41%	5%	3%		2%		20%	6%
Standing up to the federal government	16%	40%	4%	3%	3%	2%		21%	10%
Education	32%	24%	5%	3%		3%		23%	6%
The environment	25%	18%	4%	3%	3%	18%		21%	6%
Social issues	32%	21%	5%	3%		3%		24%	7%
Electricity	23%	27%	5%	3%		5%		28%	8%
Indigenous issues	24%	17%	6%		3%	3%		32%	10%

Legend:
- ■ The Alberta New Democratic Party
- ■ The United Conservative Party
- ■ The Alberta Liberal Party
- ■ The Alberta Party
- ■ The Wildrose Independent Party
- ■ The Alberta Green Party
- ■ Another party (please specify)
- ■ Don't know
- ■ None

Identity: 2-in-5 say that they consider themselves a *Canadian First* while 22% say *Albertan First*; a plurality (34%) say *equally both*

Q When you think about your connection to your province and your country, sometimes we find ourselves with competing loyalties. When that happens, do you consider yourself as an Albertan before Canadian or a Canadian before Albertan?
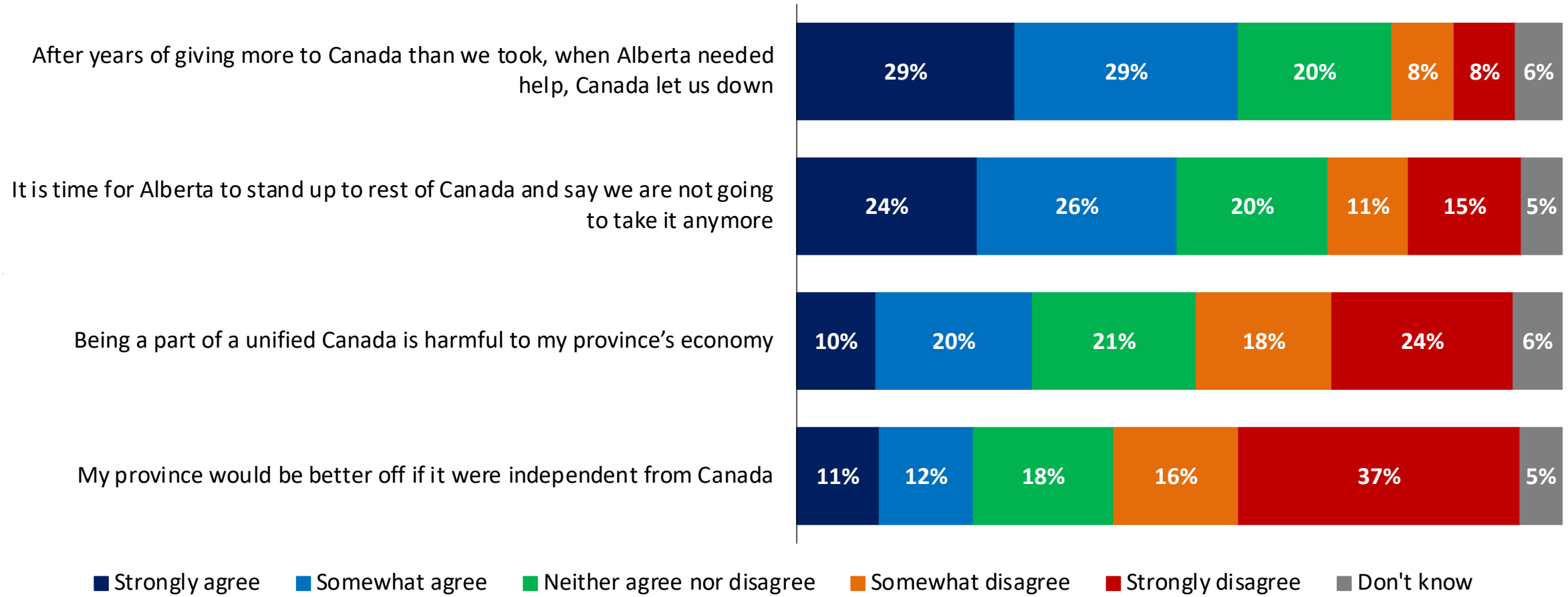[asked of all respondents; n=1,500]

41% Canadian First

22% Albertan First

24%
17%
34%
11%
11%
4%

Always a Canadian first | Usually a Canadian first | Equally a Canadian and an Albertan | Usually an Albertan first | Always an Albertan first | Don't know

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Alienation Attitudes: 58% agree that *'Canada let Alberta down'* while half agree that *'It's time for Alberta to stand up to the rest of Canada'*

Q Do you agree or disagree with the following statements?
[asked of all respondents; n=1,500]

After years of giving more to Canada than we took, when Alberta needed help, Canada let us down
- Strongly agree: 29%
- Somewhat agree: 29%
- Neither agree nor disagree: 20%
- Somewhat disagree: 8%
- Strongly disagree: 8%
- Don't know: 6%

It is time for Alberta to stand up to rest of Canada and say we are not going to take it anymore
- Strongly agree: 24%
- Somewhat agree: 26%
- Neither agree nor disagree: 20%
- Somewhat disagree: 11%
- Strongly disagree: 15%
- Don't know: 5%

Being a part of a unified Canada is harmful to my province's economy
- Strongly agree: 10%
- Somewhat agree: 20%
- Neither agree nor disagree: 21%
- Somewhat disagree: 18%
- Strongly disagree: 24%
- Don't know: 6%

My province would be better off if it were independent from Canada
- Strongly agree: 11%
- Somewhat agree: 12%
- Neither agree nor disagree: 18%
- Somewhat disagree: 16%
- Strongly disagree: 37%
- Don't know: 5%

Legend: ■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

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Current data: April 2023

Western Alienation: Just over half of Albertans (52%) feel alienated from Canada, while 30% feel neutral

Alienation segmentation: We combined the following two questions into an index measuring the amount of alienation Albertans feel from Canada
- Agree/Disagree: *After years of giving more to Canada than we took, when Alberta needed help, Canada let us down.*
- Agree/Disagree: *It is time for Alberta to stand up to rest of Canada and say we are not going to take it anymore.*

18% of Albertans do not feel alienated

52% of all Albertans feel a sense of Western Alienation

30% of Albertans don't have a consistent opinion on alienation

9%   9%   31%   30%   21%

■ Strongly not alienated   ■ Somewhat not alienated   ■ Neutral   ■ Somewhat alienated   ■ Strongly alienated
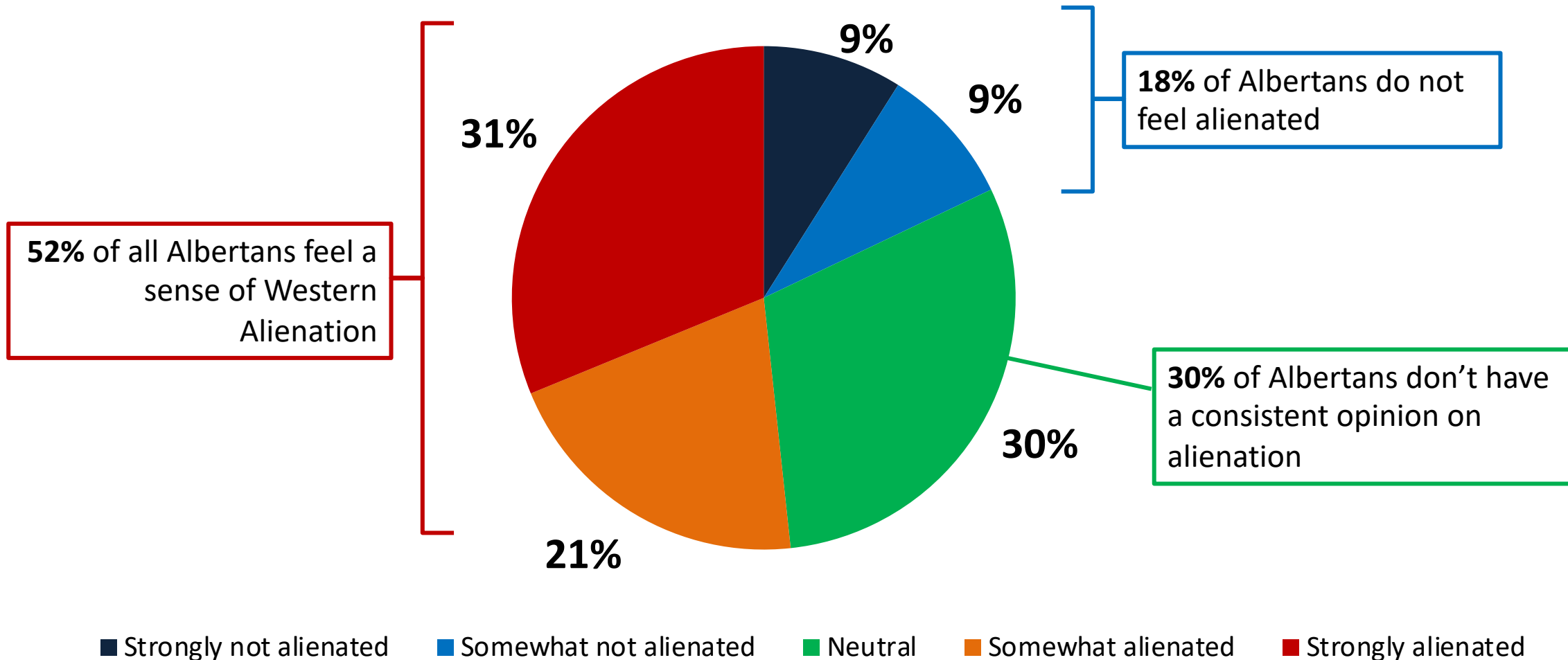
Combined Vote by Western Alienation Segments: 3-in-4 *Not Alienated* would vote NDP; those *Alienated* most likely to vote UCP

Western Alienation Segments

Provincial Combined Vote	Not Alienated (N=269)	Neutral (N=456)	Alienated (N=776)
Liberal	5%	9%	5%
UCP	7%	21%	55%
NDP	75%	36%	21%
Alberta Party	2%	6%	4%
Wildrose Independent	1%	3%	3%
Green	2%	6%	3%
Other	<1%	<1%	<1%
Undecided/DK	5%	15%	8%
WNV/None	2%	3%	1%

Note: Current data: April 2023

Sovereignty Act: 46% say that they've been following the news 'somewhat closely' while almost 1-in-4 say 'have only heard of them'

Q How closely have you been following news about Alberta's Premier, Danielle Smith and her plans to enact a Sovereignty Act to defend against federal government incursions into areas of provincial responsibility or policies that hurt Alberta's interests?
[asked of all respondents; n=1,500]

Bar chart values:
- Very closely and could explain the details to others: 13%
- Somewhat closely, but could not explain the details: 46%
- Have only heard of them: 23%
- Had not heard of her comments until this survey: 12%
- Don't know: 6%

Current data: April 2023

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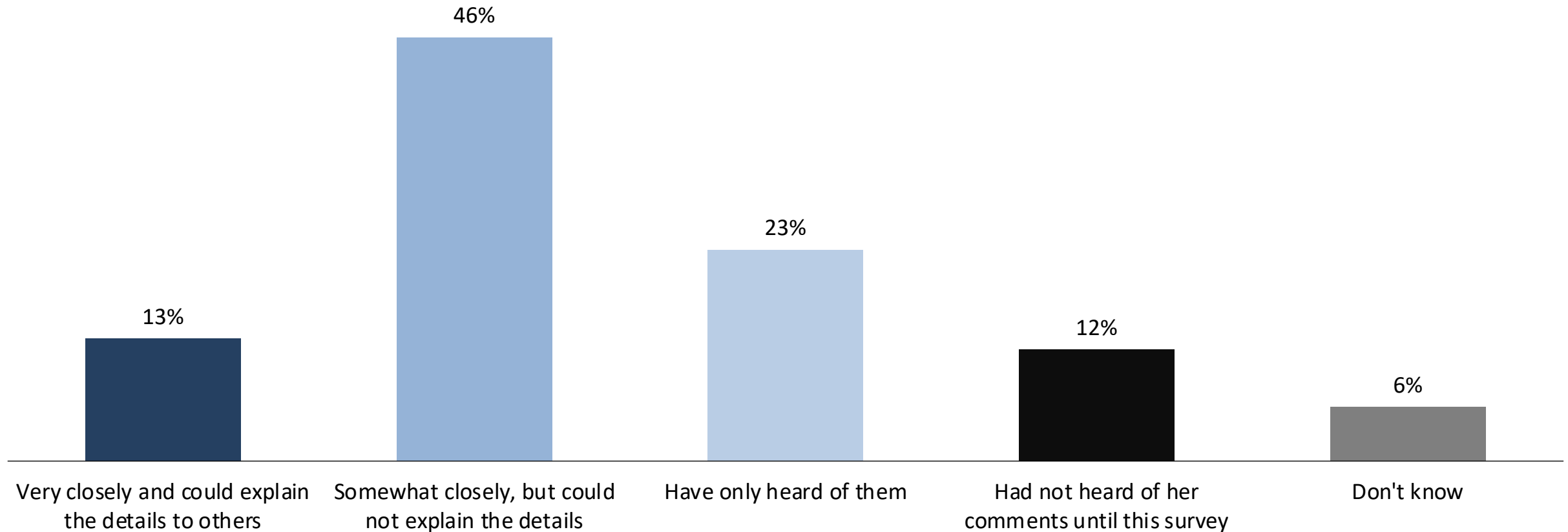
Approval of Sovereignty Act: 45% disapprove of Danielle Smith's approach with the Sovereignty Act; over 1-in-3 (34%) approve

Q Do you approve or disapprove of the approach Danielle Smith is taking with the Sovereignty Act?
[asked of respondents who have heard of Danielle Smith's plan to enact the Sovereign Act; n=1,231]

45% Disapprove

34% Approve

31%

21%

17%

14%

13%

5%

Strongly approve | Somewhat approve | Neither approve nor disapprove | Somewhat disapprove | Strongly disapprove | Don't know

Current data: April 2023

INNOVATIVE RESEARCH GROUP
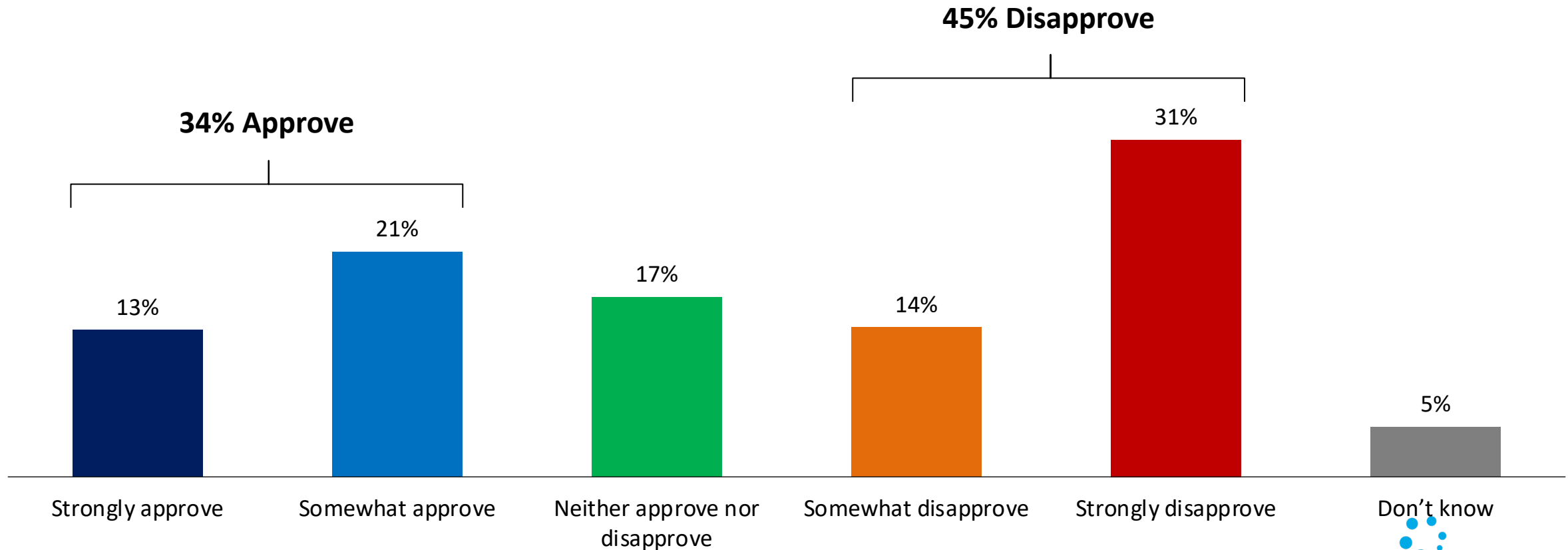
Familiarity: Over half (57%) are unfamiliar with the Take Back Alberta organization while 30% are familiar and 13% don't know

Q How familiar are you with the **Take Back Alberta** organization?
[asked of all respondents; n=1,500]

30% Familiar

57% Unfamiliar

5%	25%	25%	32%	13%
Very familiar and can explain the organization in detail to others	Somewhat familiar with the organization, but cannot explain it in detail	Have heard of the organization before, but I don't know anything about it	Have not heard of the organization before this survey	Don't know

Current data: April 2023

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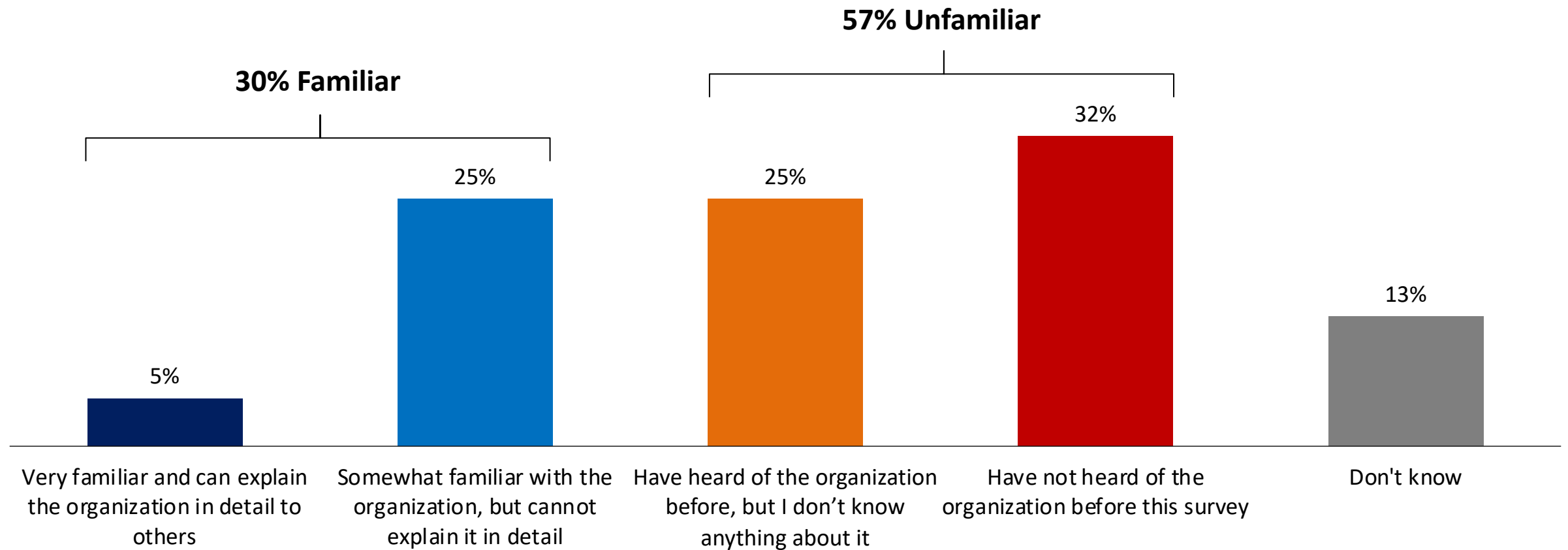
Take Back Alberta: 2-in-5 (41%) oppose the Take Back Alberta organization while 1-in-4 (19%) support it

Q Do you support or oppose the Take Back Alberta organization?
[asked of all respondents; n=1,500]

41% Oppose

19% Support

6%	13%	26%	10%	30%	14%
Strongly support	Somewhat support	Neither support nor oppose	Somewhat oppose	Strongly oppose	Don't know

Current data: April 2023

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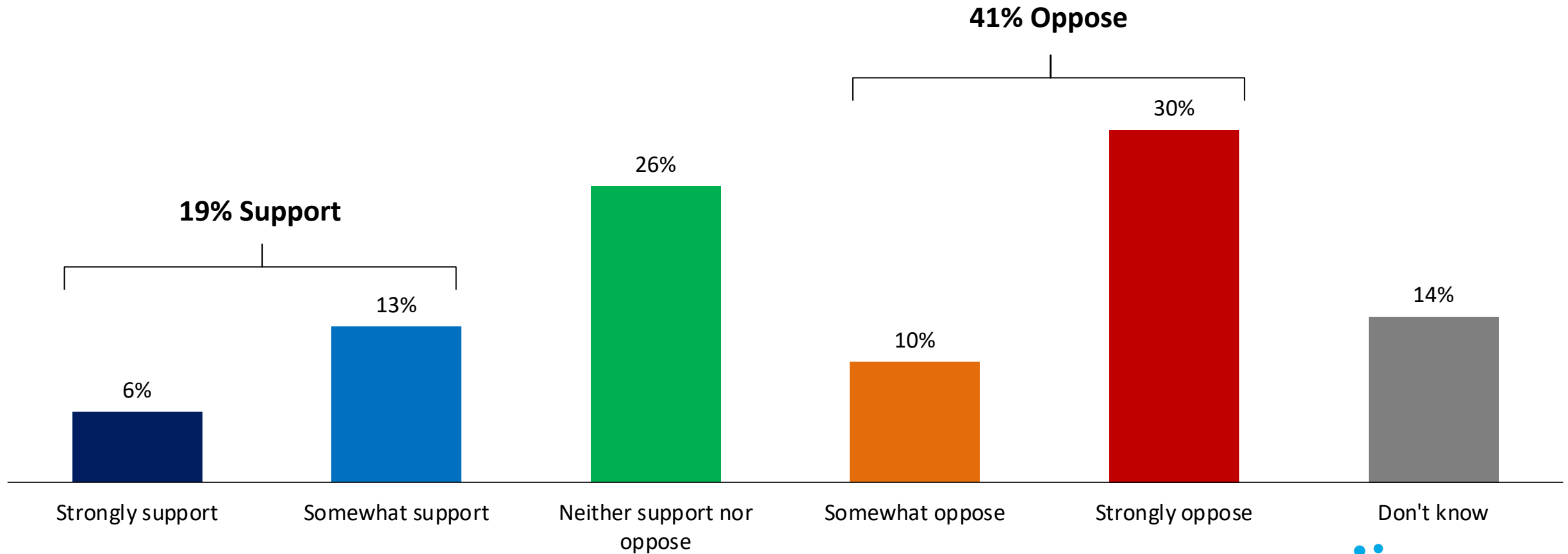
Fear and Loathing: Net agreement (+28%) highest for *'I am afraid of what Danielle Smith and the UCP might do if they form government'*

Q Please indicate whether you agree or disagree with the following statements
[asked of all respondents; n=1,500]

Net Agreement
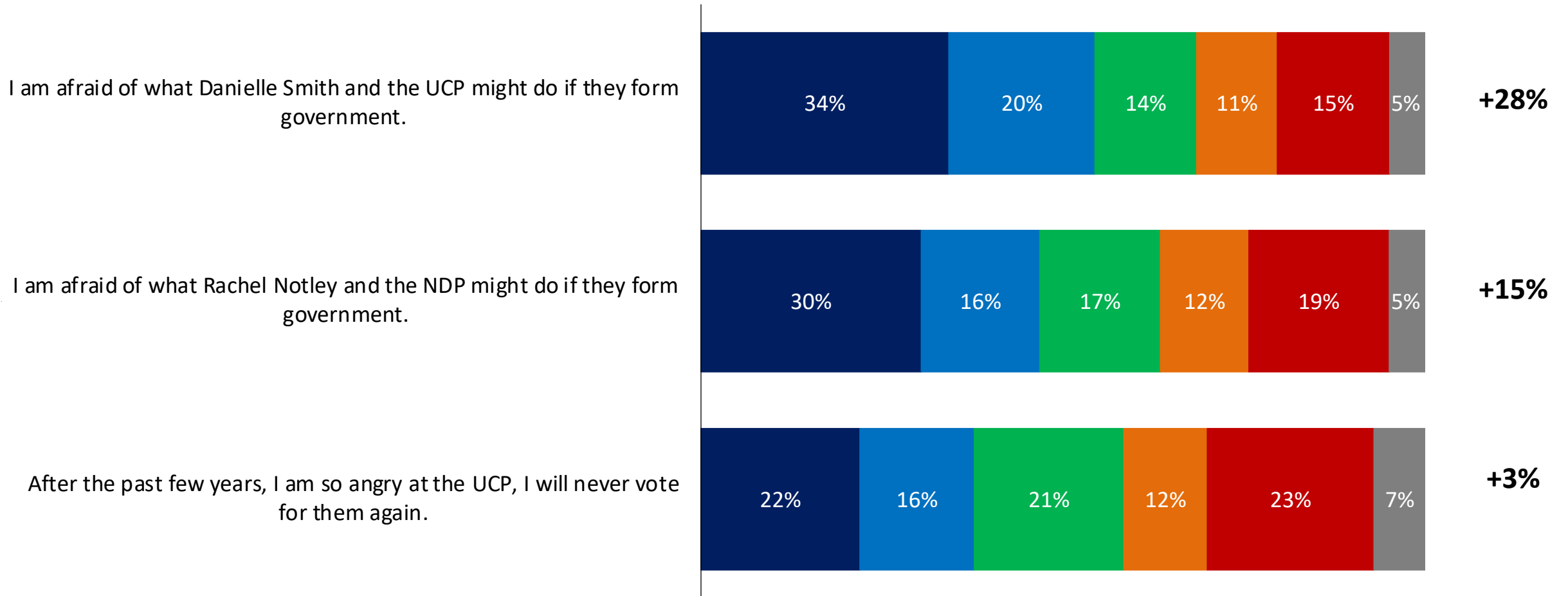
Statement	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't Know	Net Agreement
I am afraid of what Danielle Smith and the UCP might do if they form government.	34%	20%	14%	11%	15%	5%	+28%
I am afraid of what Rachel Notley and the NDP might do if they form government.	30%	16%	17%	12%	19%	5%	+15%
After the past few years, I am so angry at the UCP, I will never vote for them again.	22%	16%	21%	12%	23%	7%	+3%

■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't Know

Current data: April 2023

Attributes: Notley is described as hardworking, intelligent, and confident, while Smith is described as careless and confident

Q Now, thinking about [LEADER], which of the following words best describe that leader? Select up to 5.
[asked of all respondents who know the leader]

Danielle Smith

Rachel Notley

Alberta Party Leader NET Favourables Tracking: Smith's favourability is down 13 points from post-holiday high

Q Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that perso and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.
[asked of all respondents; n=1,500]

David Khan John Roggeveen Jason Kenney Danielle Smith

+1% -1% -22% +1% -8% -12%

Aug-17 Jan-18 Dec-18 Mar-19 Apr-19 Apr-19 (2) Jan-20 Mar-20 May-20 Jun-20 Jul-20 Dec-20 Jan-21 Feb-21 Mar-21 Apr-21 May-21 Jun-21 Jul-21 Sep-21 Dec-21 Jan-22 Feb-22 Mar-22 Apr-22 May-22 Jun-22 Jul-22 Aug-22 Sep-22 Oct-22 Nov-22 Dec-22 Jan-23 Apr-23

—— Notley, Alberta NDP   —— Kenney/Smith, UCP   —— Khan/Roggeveen, Alberta Liberal Party

Current data: April 2023

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Best Premier Tracking: Smith being considered best fit for Premier has decreased to 28% from 34% in January 2023

Q Which of the following leaders would make the best Premier of Alberta?
[asked of all respondents; n=1,500]

Legend: Notley, Alberta NDP — Smith, UCP — Roggeveen, Alberta Liberal Party — Other — None of the above — Undecided/Don't know

Current data: April 2023

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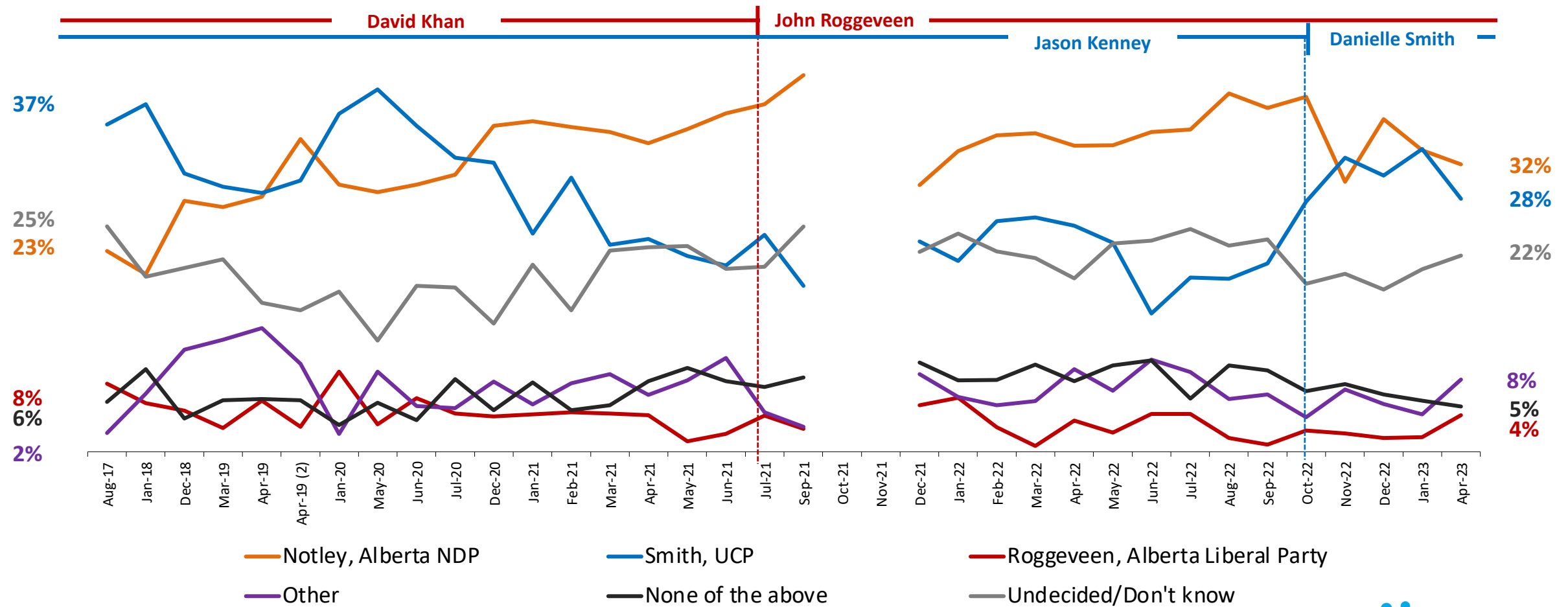
Questions?

General Affordability

Household Arrangement: Since last year, the proportion of those who own a house without a mortgage increased by 4 points

Q Which of the following best applies to your current situation?
[asked of all respondents; n=2,000]

Chart (vertical bars):
- I own a home without a mortgage: 32%
- I own a home with a mortgage: 30%
- I am renting: 34%
- Other: 4%
- Don't know: 1%
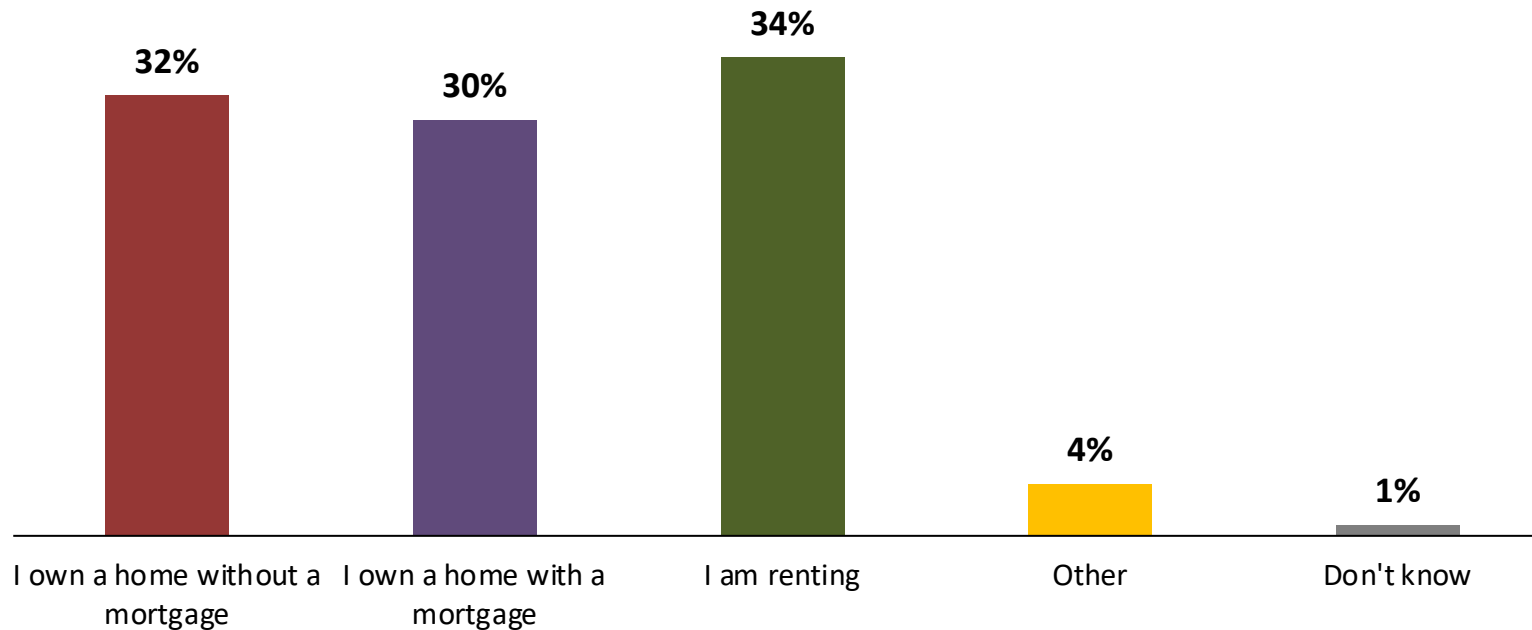
Segmentation
Those who own a home without a mortgage

Region
- BC: 35%
- Alberta: 37%
- Prairies: 35%
- Ontario: 32%
- Quebec: 25%
- Atlantic: 35%

Party ID
- Liberal: 37%
- Conservative: 36%
- NDP: 23%
- Green/Other: 28%
- Unaligned: 27%

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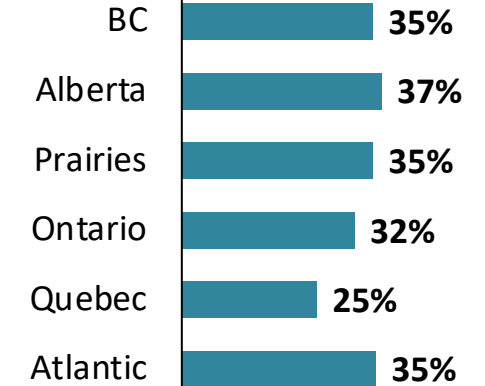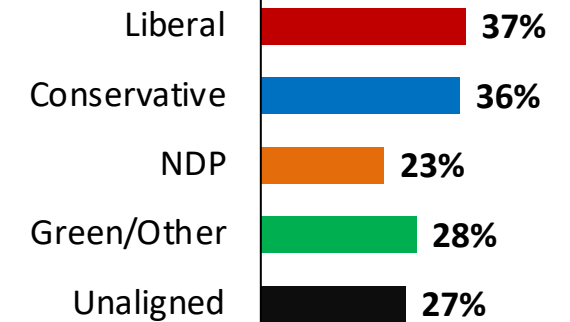
Household Financial Situation Tracking: Confidence in household financial situation increased marginally by 3 points since last year

Q Generally speaking, how confident and secure do you feel about your household's current financial situation?
[asked of all respondents; n=2,000]

**% Confident**

Date	Very confident	Somewhat confident	Not very confident	Not confident at all	Don't know	% Confident
Jan 2023	16%	47%	22%	12%	3%	63%
Sep 2022	13%	48%	24%	13%	2%	60%
June 2020	21%	52%	19%	6%	2%	72%
May 2020	16%	47%	25%	9%	4%	63%
Apr 2020 (Wave 2)	14%	51%	22%	11%	2%	65%
Apr 2020 (Wave 1)	13%	45%	25%	13%	3%	58%
Mar 2020	11%	46%	25%	15%	3%	57%
Feb 2020	16%	45%	25%	11%	4%	61%
Feb 2016	14%	45%	25%	13%	3%	59%
Apr 2014	17%	47%	24%	11%	2%	63%
Apr 2012	18%	50%	19%	11%	2%	67%
July 2011	14%	51%	23%	9%	2%	66%
Jan 2010	17%	50%	22%	10%	2%	68%
Oct 2009	15%	53%	22%	9%	1%	66%
Apr 2009	13%	53%	22%	10%	2%	69%
July 2008	17%	52%	20%	9%	1%	

■ Very confident ■ Somewhat confident ■ Not very confident ■ Not confident at all ■ Don't know

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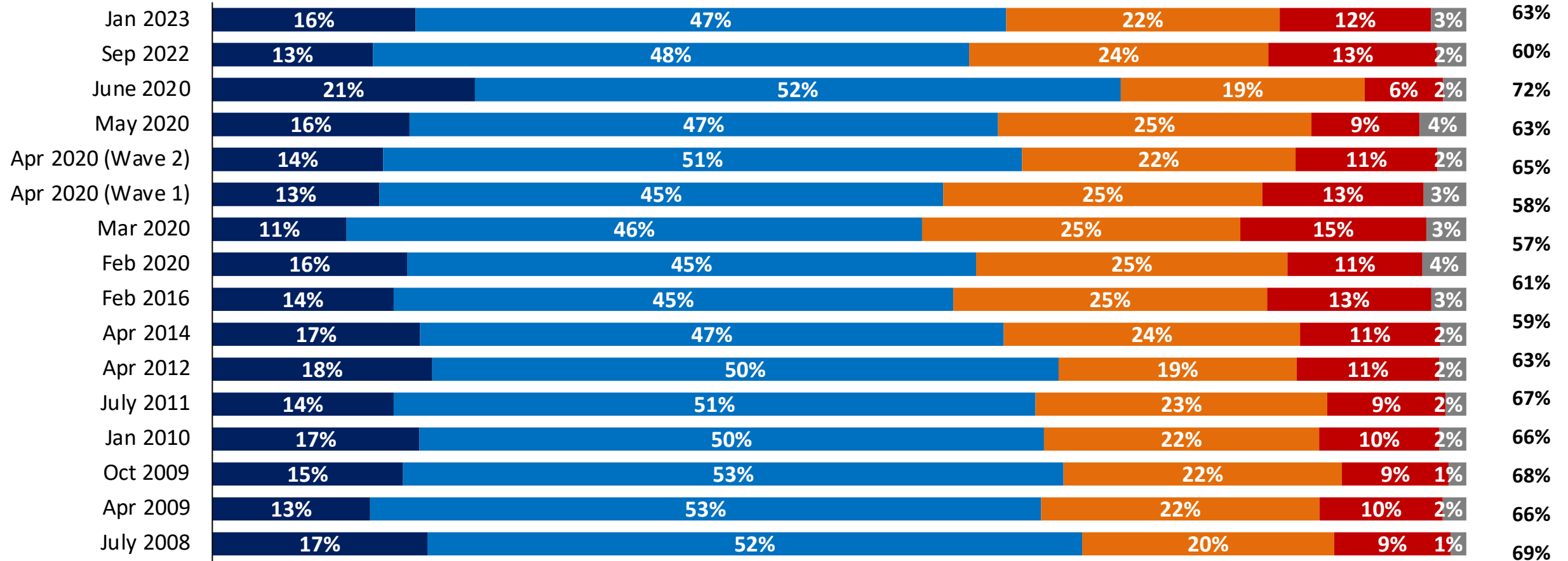
Household BY Financial Situation: Confidence with their financial situation is highest among those who own a house without a mortgage

Q Generally speaking, how confident and secure do you feel about your household's current financial situation?
BY Household Arrangement
[asked of all respondents; n=2,000]

% Confident

Overall
| 16% | 47% | 22% | 12% | 3% |
63%

I own a home without a mortgage
| 30% | 50% | 14% | 5% | |
79%

I own a home with a mortgage
| 14% | 52% | 23% | 10% | 2% |
66%

I am renting
| 7% | 43% | 27% | 20% | 3% |
50%

■ Very confident ■ Somewhat confident ■ Not very confident ■ Not confident at all ■ Don't know

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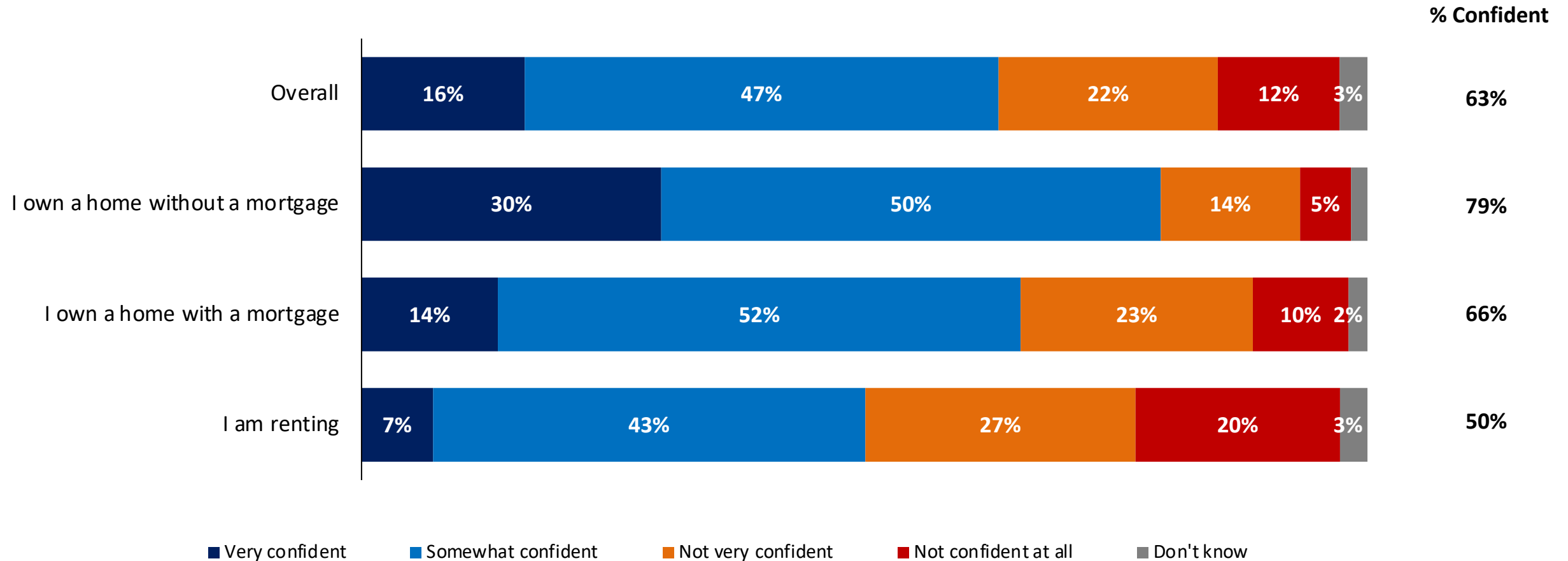
Direct Impact: Nearly 9-in-10 (89%) say inflation directly impacts them; highest among those in Atlantic and those who own with a mortgage

Q Is inflation and the rising cost of living having a direct impact on you today?
[asked of all respondents; n=2,000]

	% Yes
Jan 2023 — 43% / 46% / 8% / 3%	**89%**
Sep 2022 — 43% / 45% / 9% / 3%	**88%**
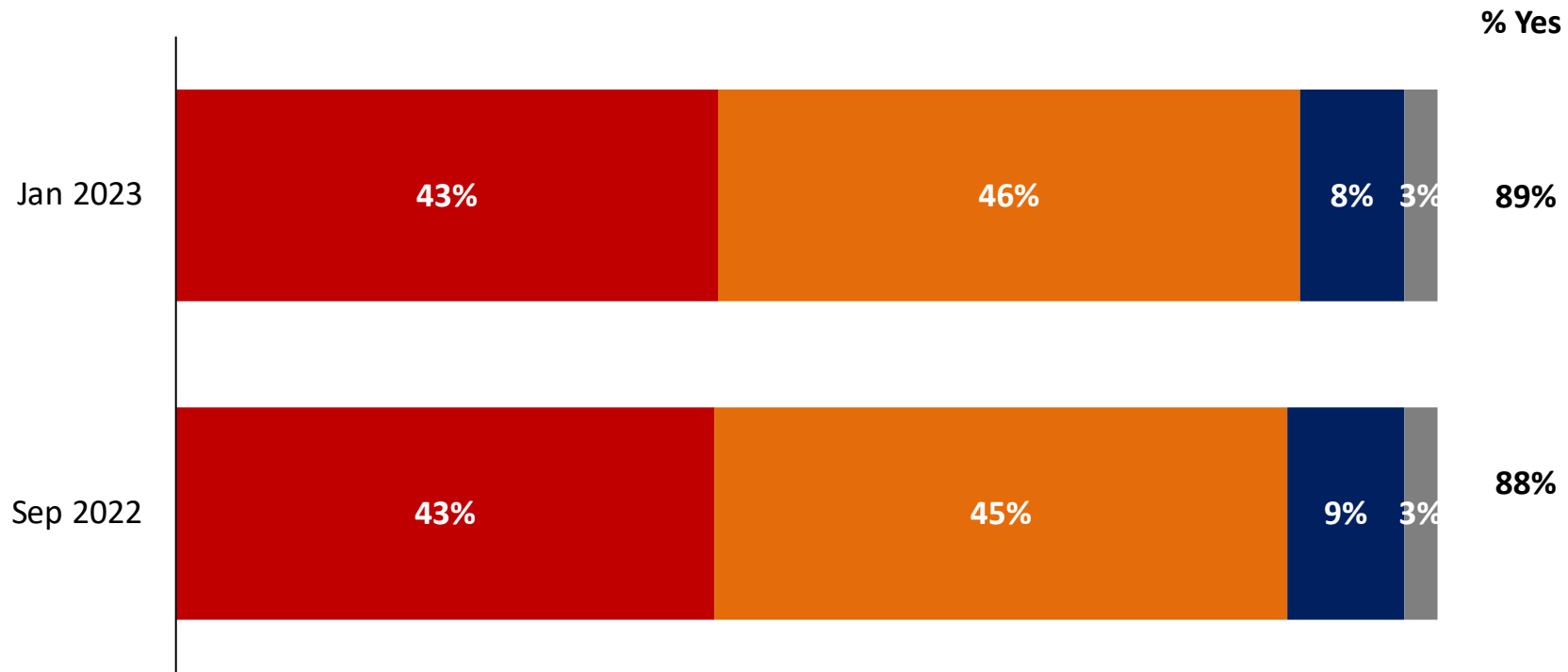
Legend:
- 🟥 Yes, a major impact where we have to do without some things
- 🟧 Yes, but we are able to adjust without doing without things
- 🟦 No
- ⬜ Don't know

Segmentation
Those who say "yes"

Region

BC	90%
Alberta	91%
Prairies	92%
Ontario	90%
Quebec	85%
Atlantic	93%

Party ID

Liberal	88%
Conservative	92%
NDP	89%
Green/Other	89%
Unaligned	88%

Household Arrangement

Own (no mortgage)	86%
Own (with mortgage)	92%
Rent	90%

INNOVATIVE RESEARCH GROUP
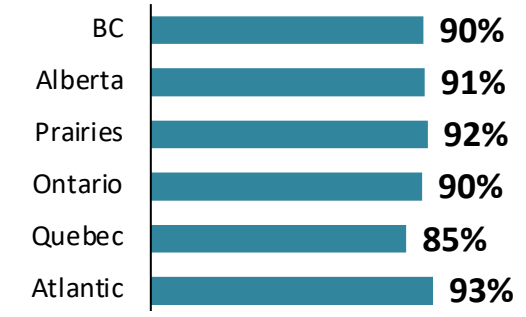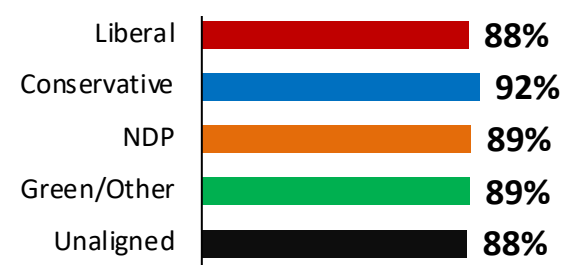
Impact of Bill by Energy Type: Across the bill types, more are likely to say they are managing their bill impact

Q Thinking about each of those types of energy bills, please indicate the impact that bill is having on your household finances?
[asked of all respondents; n=2,000]
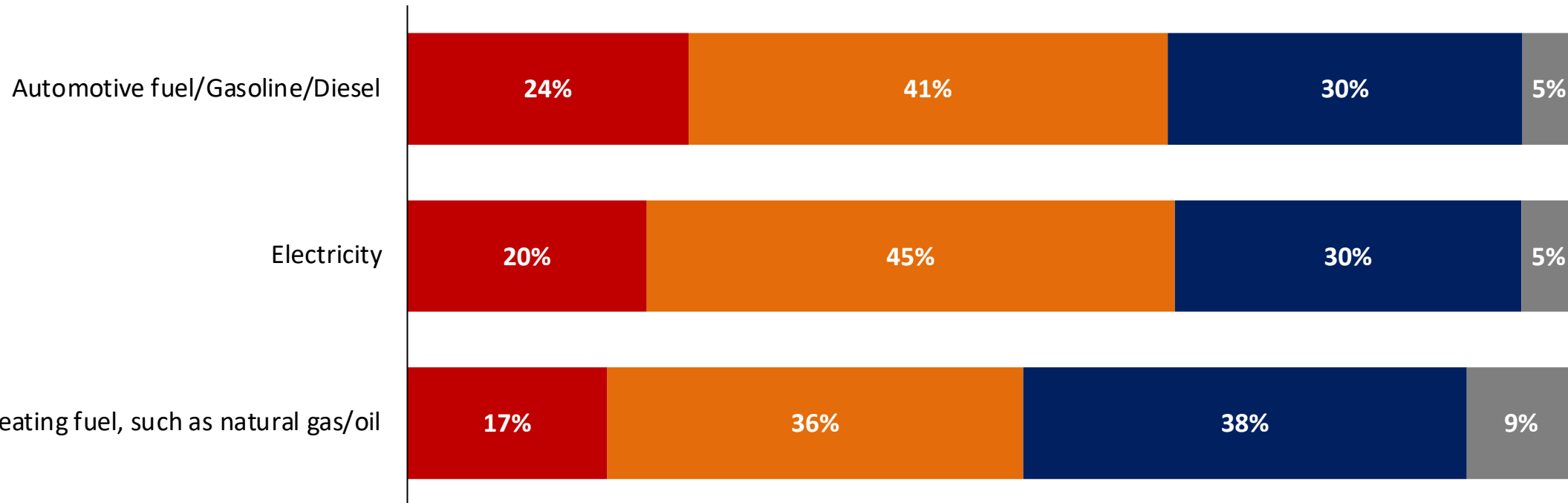
	A major impact where we have to do without some things	A significant impact but we are able to adjust without doing without things	No significant impact	Don't know
Automotive fuel/Gasoline/Diesel	24%	41%	30%	5%
Electricity	20%	45%	30%	5%
Home heating fuel, such as natural gas/oil	17%	36%	38%	9%

- A major impact where we have to do without some things
- A significant impact but we are able to adjust without doing without things
- No significant impact
- Don't know

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Financial Sacrifices: 2-in-5 (40%) say they have had to make financial sacrifices to keep up with cost of energy while over half (53%) did not

Q Have you had to make financial sacrifices to keep up with the cost of energy?
[asked of those whose bill has an impact on finances; n=1,632]
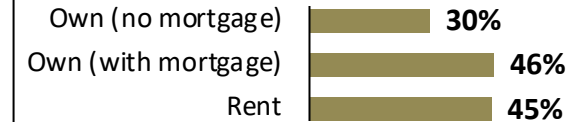
Segmentation
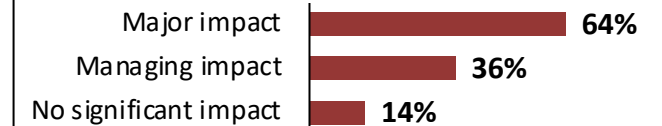*Those who say "Yes"*

Region

BC	39%
Alberta	48%
Prairies	45%
Ontario	43%
Quebec	33%
Atlantic	34%

Party ID

Liberal	34%
Conservative	46%
NDP	41%
Green/Other	37%
Unaligned	44%

Household Arrangement

Own (no mortgage)	30%
Own (with mortgage)	46%
Rent	45%
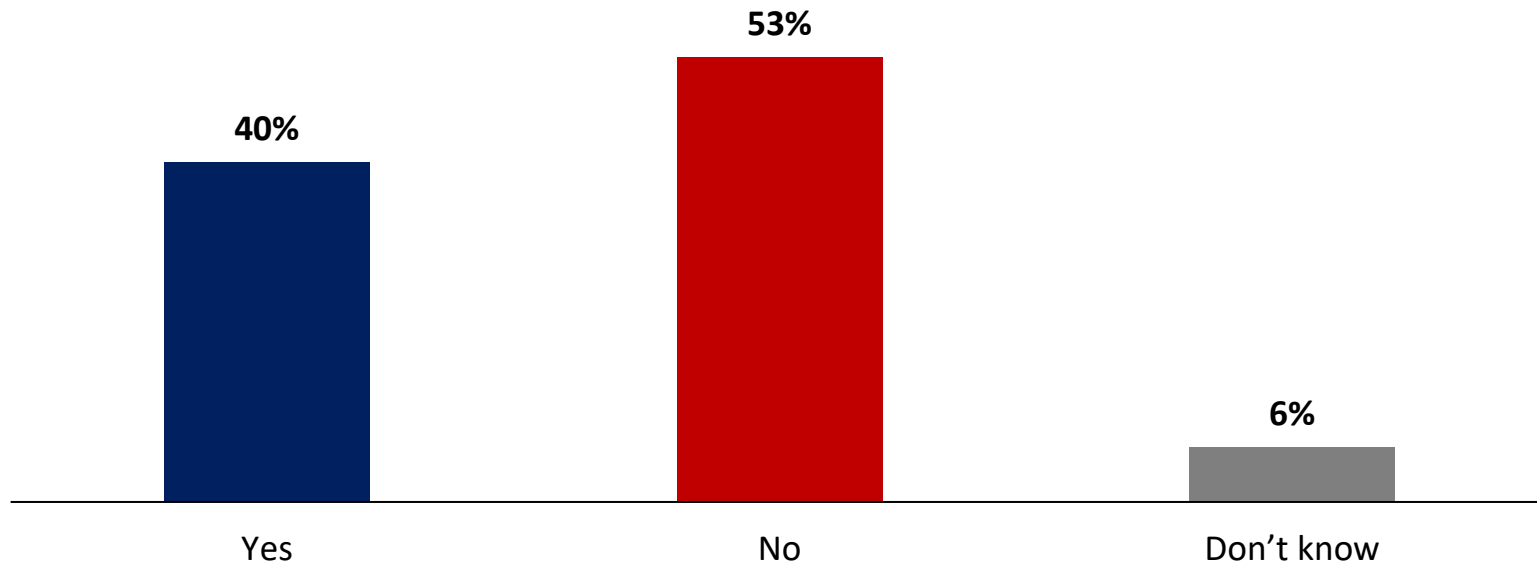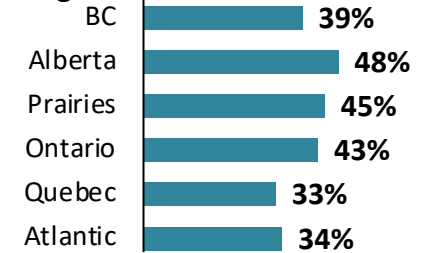
Energy Affordability (Bill Impact)

Major impact	64%
Managing impact	36%
No significant impact	14%

Yes 40%
No 53%
Don't know 6%

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Financial Sacrifices: Spending less on food/groceries is the top financial[70] sacrifice, followed by travel and reducing energy usage

Q And what sacrifices have you had to make to keep up with energy costs? [OPEN]
[asked of those who have had to make financial sacrifices; n=661]

Category	Percentage
Food/Purchase less groceries/Cheaper brands/Poorer quality/Eat less	22%
Travel	14%
Reduce Electricity/Energy	13%
Spend less/Cut costs	11%
No extra purchases/Necessary purchases only	9%
Eating out less	8%
Entertainment	6%
Adding debt/Not paying bills	3%
Savings	2%
Home/vehicle maintaince/repairs	2%
Sell possessions	2%
Work more	1%
Other	7%
None	1%
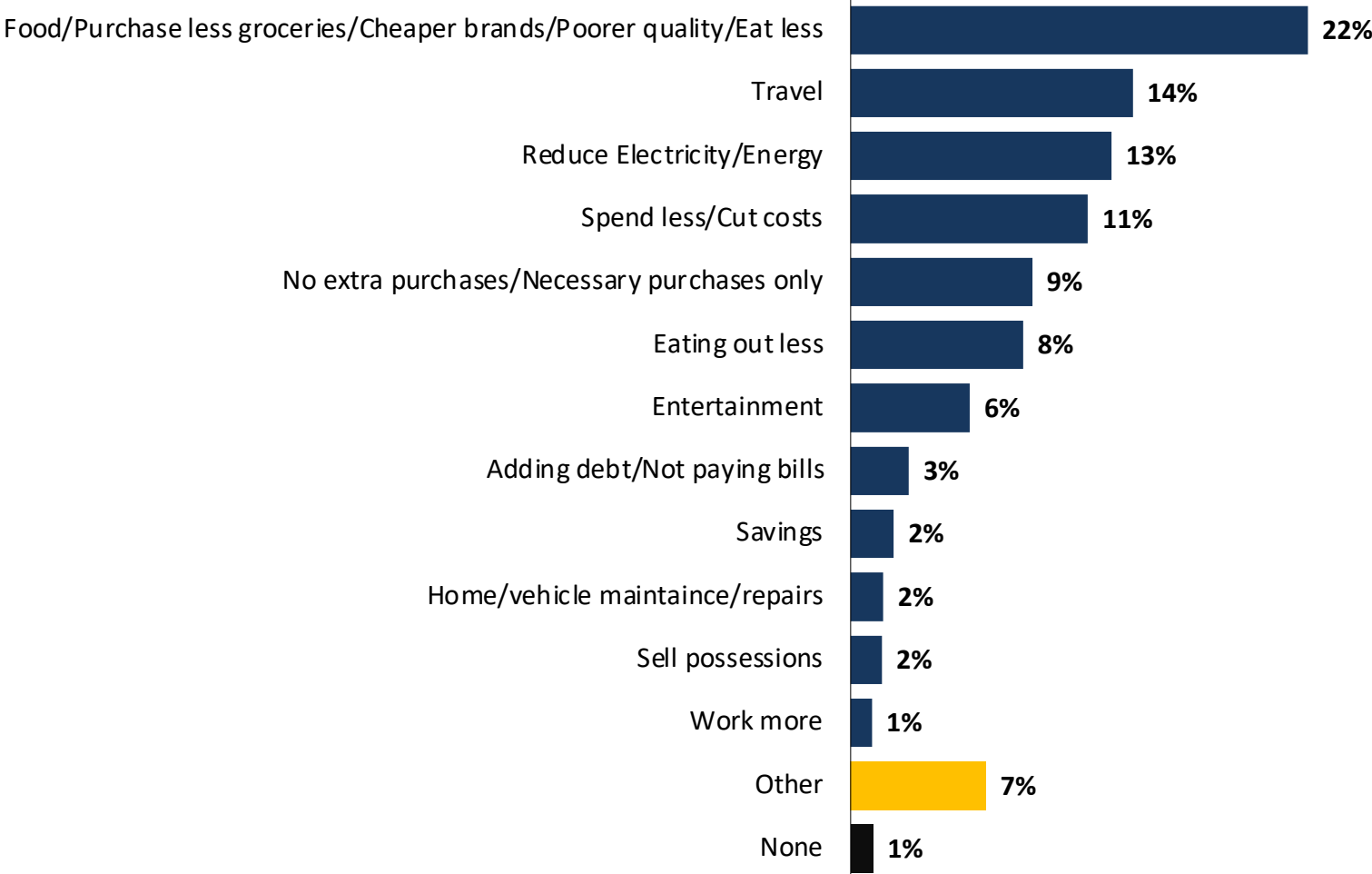
NOTE: "Refused" (1%) not shown. Categories <1% are included in "Other."

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Is it harder to secure public support to build energy infrastructure in Canada?

Social Permission: Social permission for projects close to people's homes has been relatively stable in the past few years

Q **Which of the following best represents your view of that project?**
[asked of those with proposed developments near home, n=833]

Asked of people with projects close to their homes

Total Permission
(support + necessary)
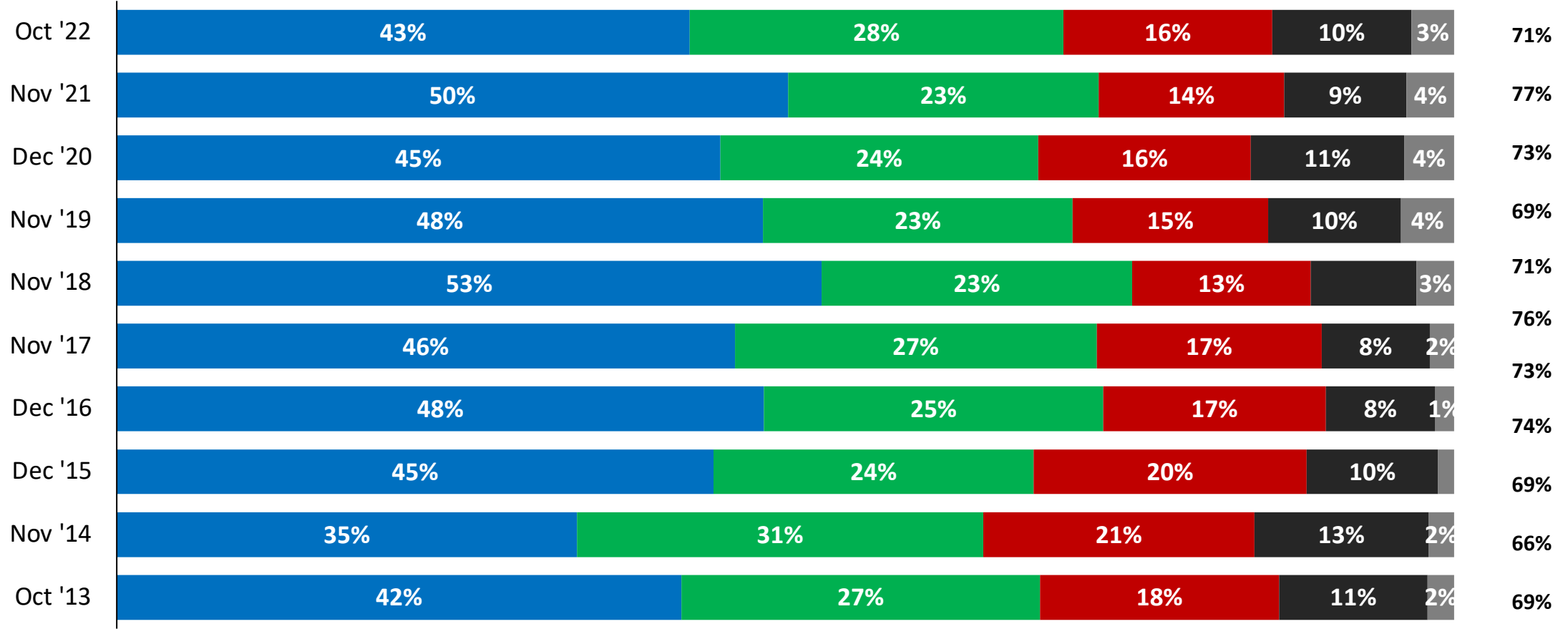
	Support	Necessary	Oppose	Don't know enough	Don't know	Total Permission
Oct '22	43%	28%	16%	10%	3%	71%
Nov '21	50%	23%	14%	9%	4%	77%
Dec '20	45%	24%	16%	11%	4%	73%
Nov '19	48%	23%	15%	10%	4%	69%
Nov '18	53%	23%	13%		3%	71%
Nov '17	46%	27%	17%	8%	2%	76%
Dec '16	48%	25%	17%	8%	1%	73%
Dec '15	45%	24%	20%	10%		74%
Nov '14	35%	31%	21%	13%	2%	69%
Oct '13	42%	27%	18%	11%	2%	66%

Legend:
- ■ It's a good thing for the community and I support it
- ■ I don't like it but I think it is necessary
- ■ It's a bad thing for the community and I oppose it
- ■ I don't feel I know enough to judge this project
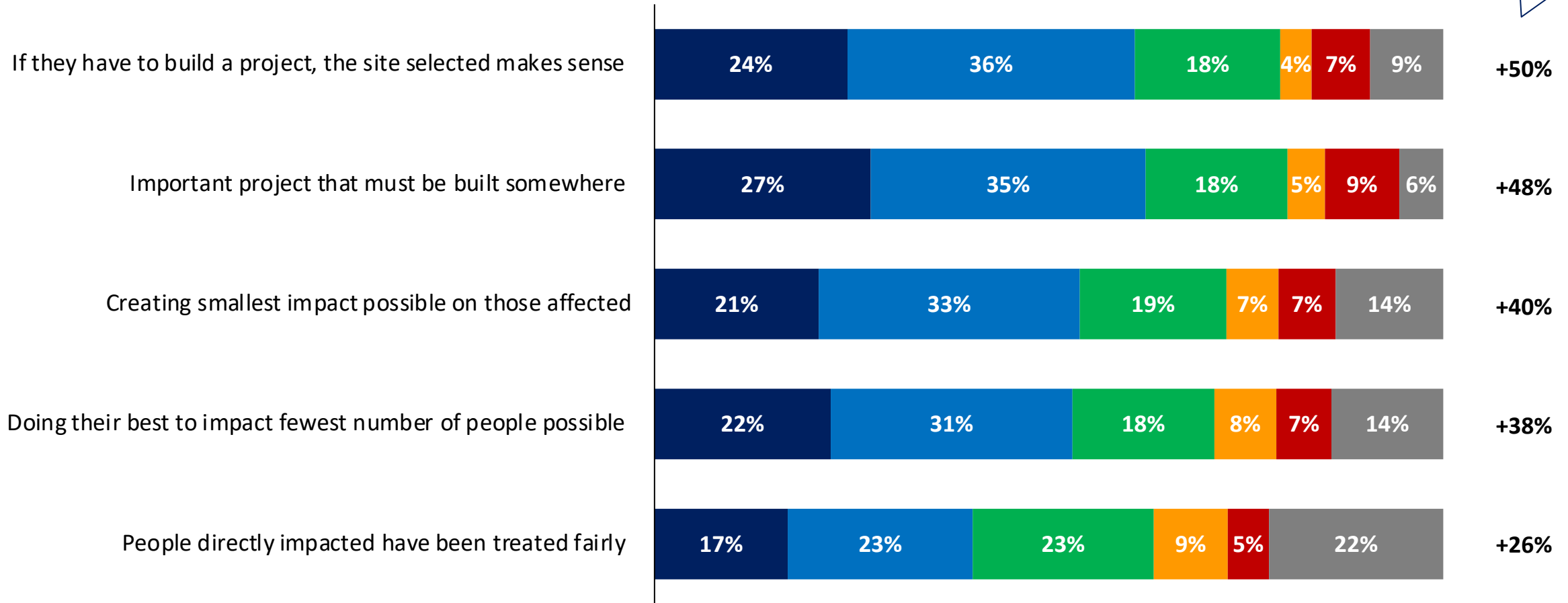- ■ Don't know

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The Hurdles: Agreement is highest on 'the site selected makes sense' and 'the project must be built somewhere'

Q Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?
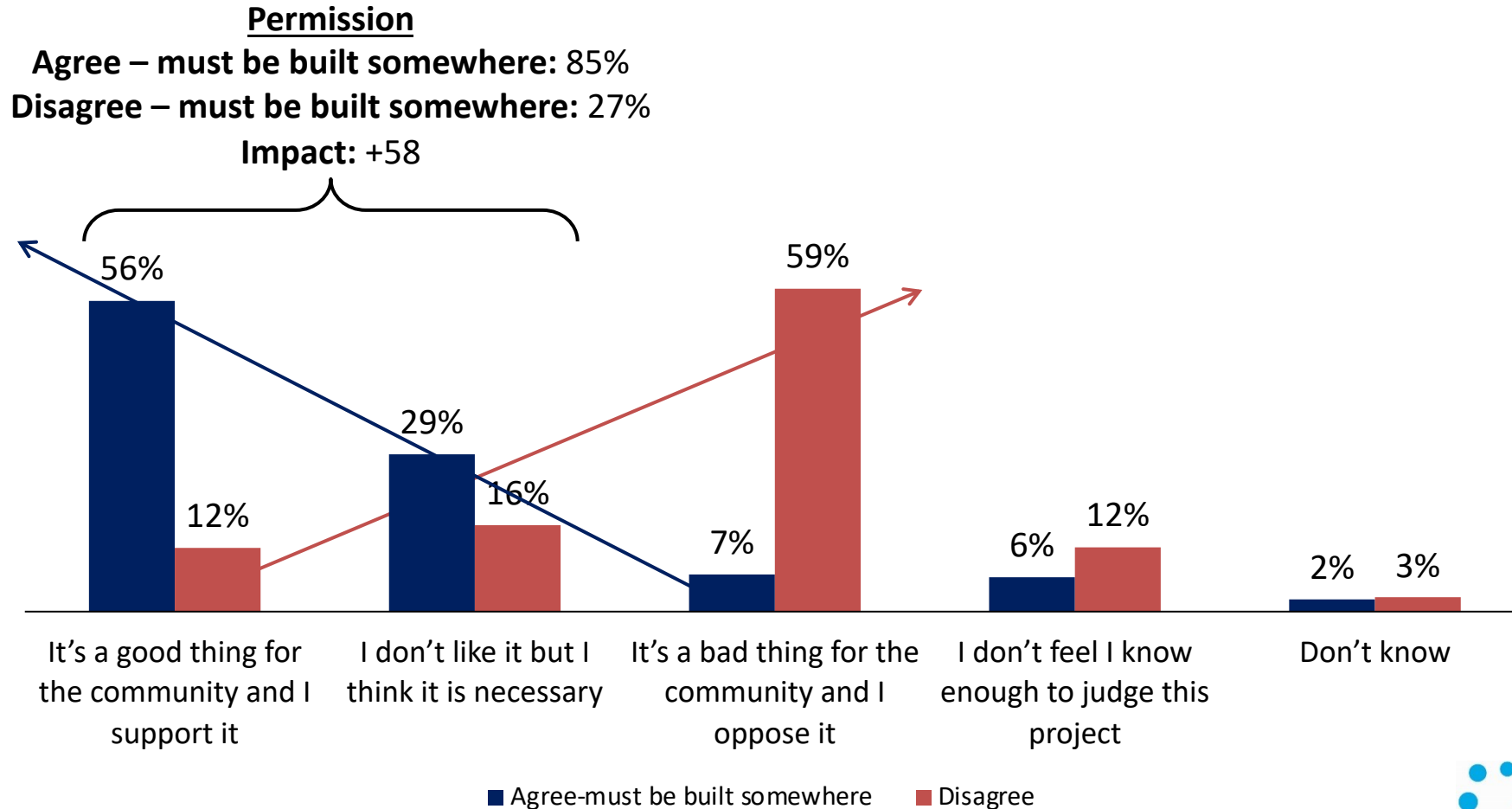[asked of those with proposed developments near home, n=833]

Net Agree

Statement	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know	Net Agree
If they have to build a project, the site selected makes sense	24%	36%	18%	4%	7%	9%	+50%
Important project that must be built somewhere	27%	35%	18%	5%	9%	6%	+48%
Creating smallest impact possible on those affected	21%	33%	19%	7%	7%	14%	+40%
Doing their best to impact fewest number of people possible	22%	31%	18%	8%	7%	14%	+38%
People directly impacted have been treated fairly	17%	23%	23%	9%	5%	22%	+26%

Legend:
■ Strongly agree   ■ Somewhat agree   ■ Neither agree nor disagree
■ Somewhat disagree   ■ Strongly disagree   ■ Don't know

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1. Need?: 85% of people who say 'this is an important project that has to be built somewhere' give social permission to the project

Q **'Which of the following best represents your view of that project' BY 'This is an important project that has to be built somewhere'**
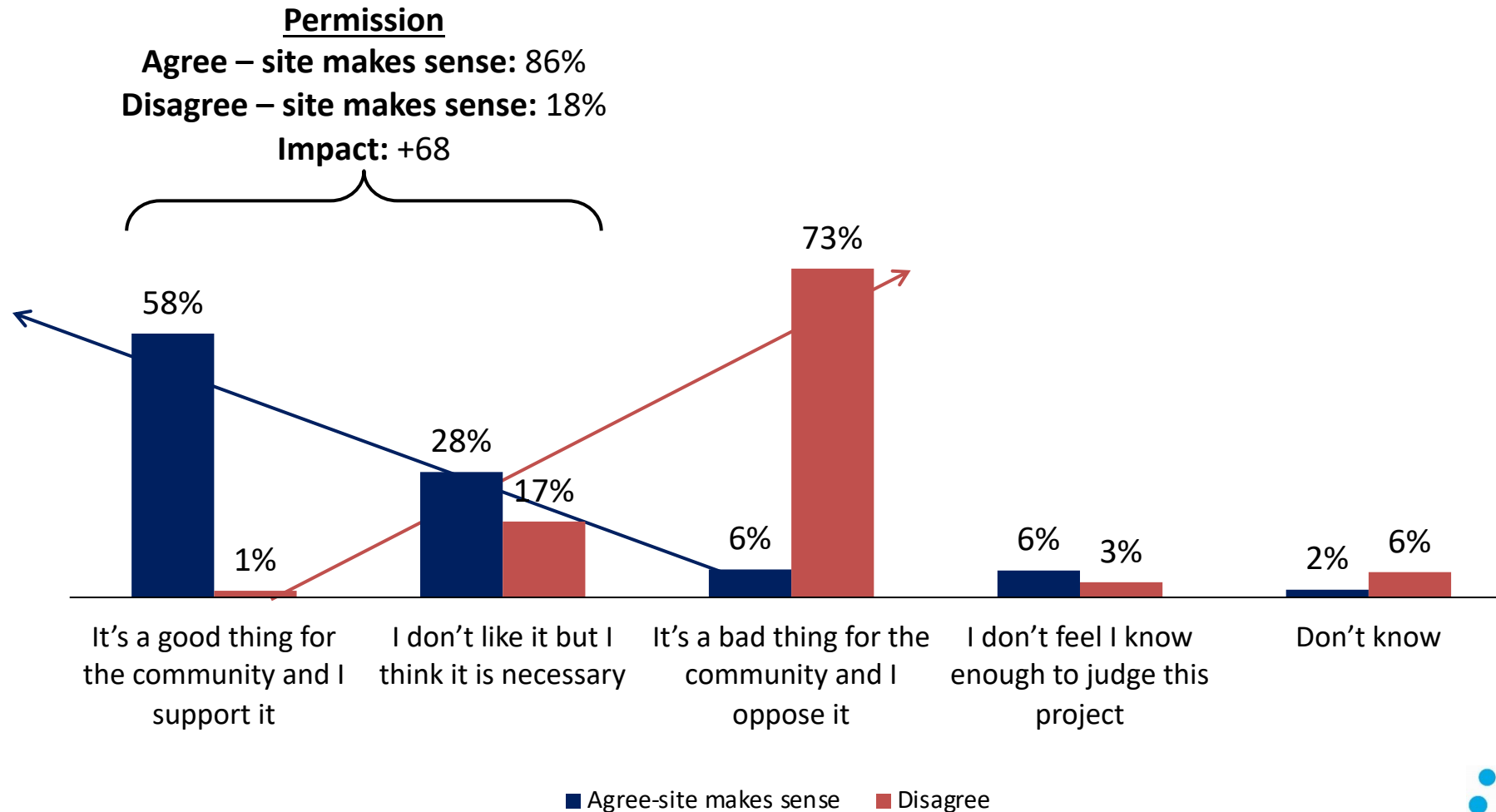[asked of those with proposed developments near home, n=833]

Permission
Agree – must be built somewhere: 85%
Disagree – must be built somewhere: 27%
Impact: +58

	It's a good thing for the community and I support it	I don't like it but I think it is necessary	It's a bad thing for the community and I oppose it	I don't feel I know enough to judge this project	Don't know
Agree-must be built somewhere	56%	29%	7%	6%	2%
Disagree	12%	16%	59%	12%	3%

■ Agree-must be built somewhere   ■ Disagree

Note: 'Don't know' if project is important not shown

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2. Best Option?: 86% of people who say 'the site they are using makes sense' give social permission to the project

Q 'Which of the following best represents your view of that project' **BY** 'If they are going to build a project like that, the site they are using makes sense'
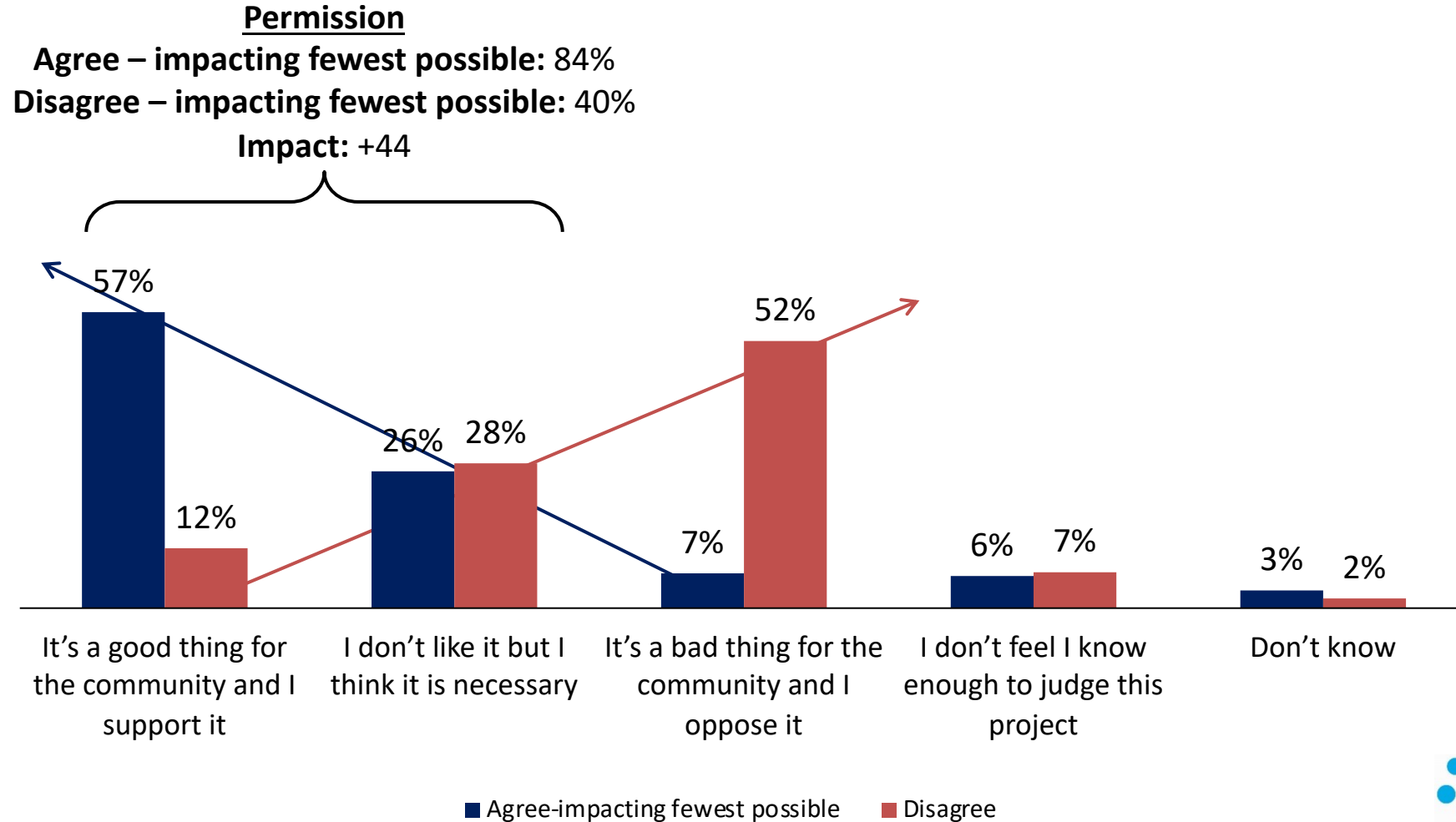[asked of those with proposed developments near home, n=833]

Permission
Agree – site makes sense: 86%
Disagree – site makes sense: 18%
Impact: +68

- **Agree-site makes sense**
- **Disagree**

Note: 'Don't know' if site makes sense not shown

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3. Impact Fewest?: 84% of people who agree that 'the builders are doing their best to impact the fewest people' give social permission

Q 'Which of the following best represents your view of that project' **BY** 'The builders of this project are doing their best to impact the fewest number of people possible'

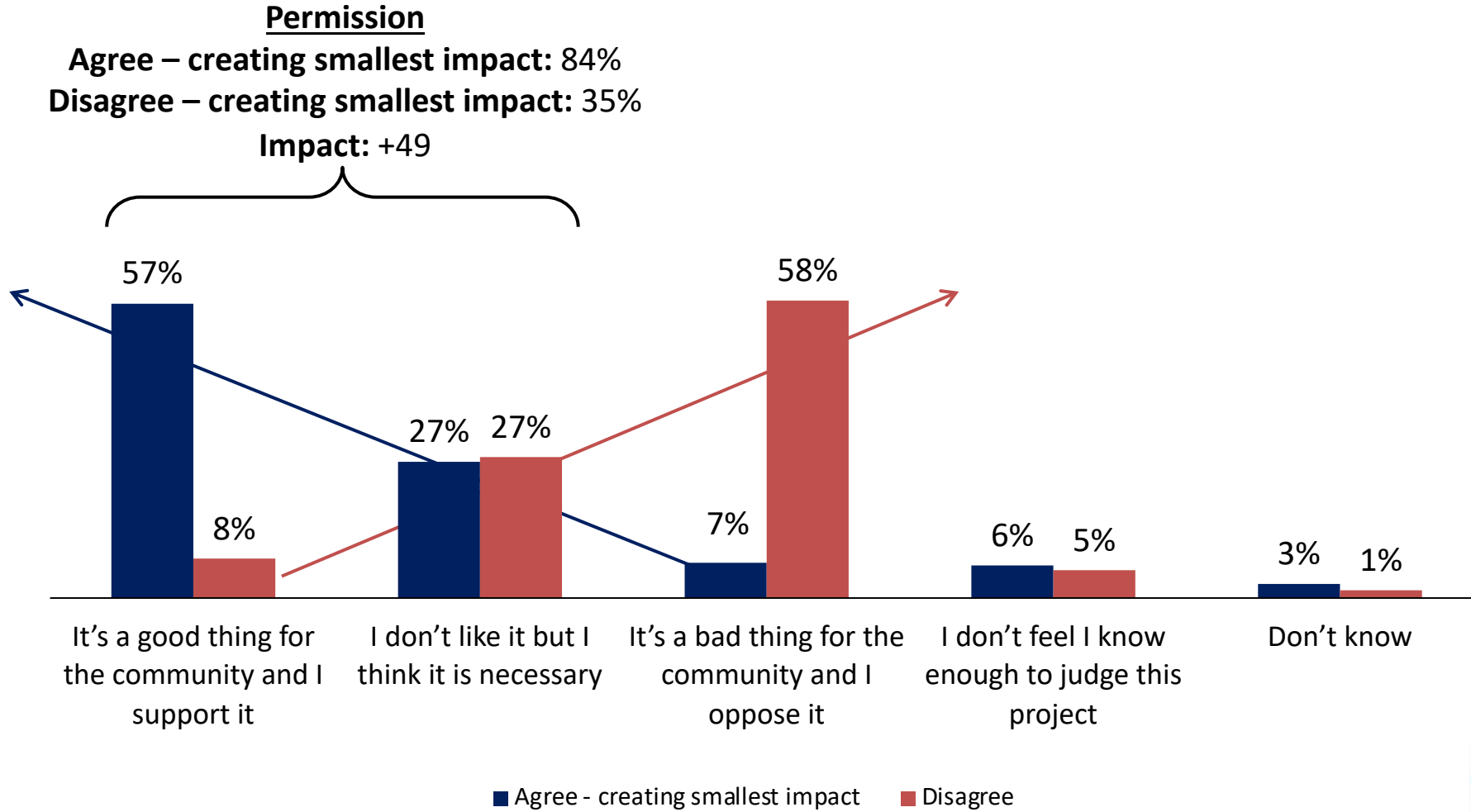[asked of those with proposed developments near home, n=833]

Permission
Agree – impacting fewest possible: 84%
Disagree – impacting fewest possible: 40%
Impact: +44

Legend: ■ Agree-impacting fewest possible   ■ Disagree

Categories (left to right): It's a good thing for the community and I support it (57%, 12%); I don't like it but I think it is necessary (26%, 28%); It's a bad thing for the community and I oppose it (7%, 52%); I don't feel I know enough to judge this project (6%, 7%); Don't know (3%, 2%)

Note: 'Don't know' about impact not shown

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4. Creating the Smallest Impact?: 83% of people who say 'doing their best to create the smallest impact' give social permission

Q 'Which of the following best represents your view of that project' **BY** 'The builders of this project are doing their best to create the smallest impact possible on those who had to be affected'
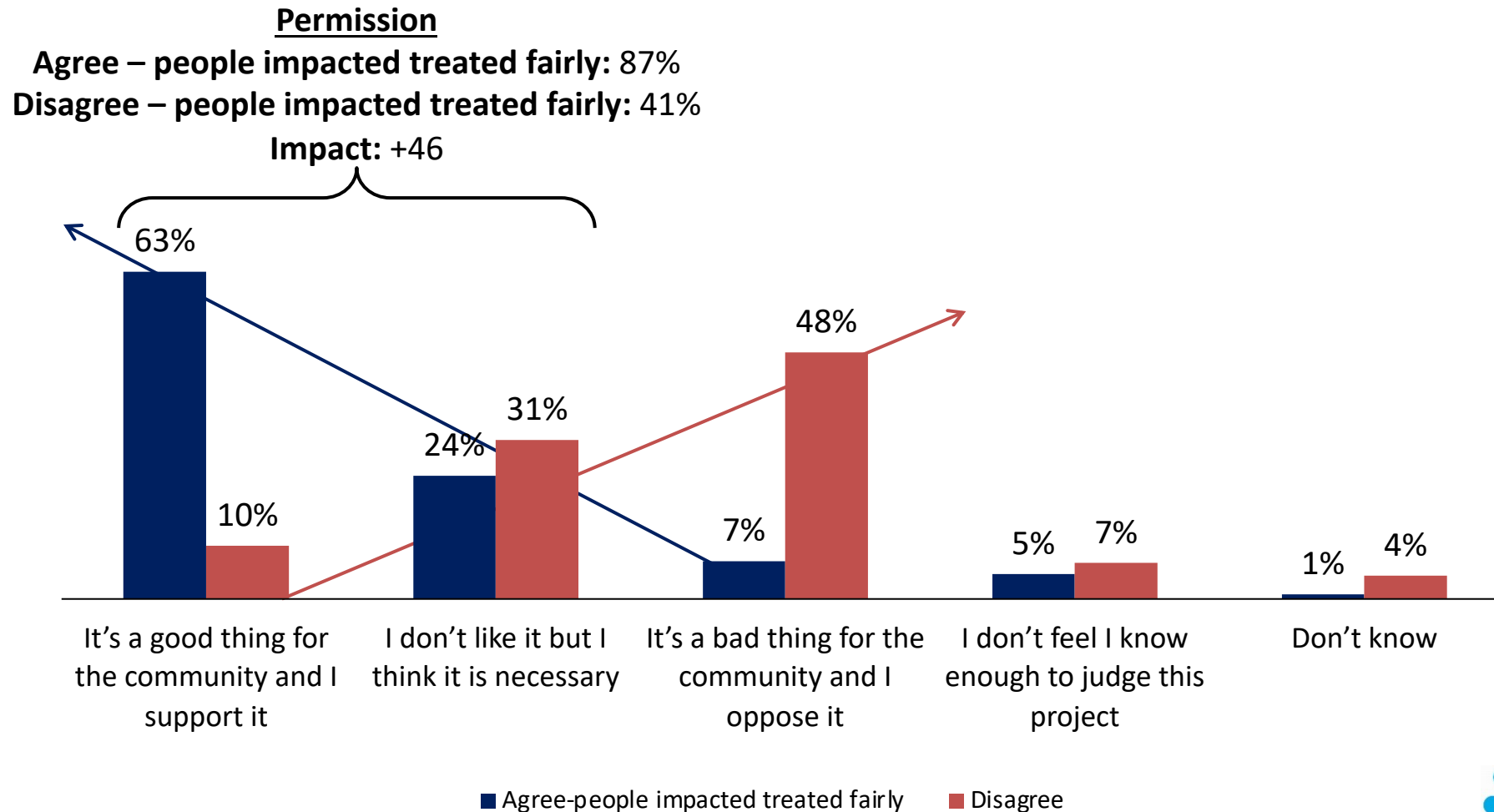[asked of those with proposed developments near home, n=833]

Permission
Agree – creating smallest impact: 84%
Disagree – creating smallest impact: 35%
Impact: +49

	Agree - creating smallest impact	Disagree

Note: 'Don't know' about impact not shown

5. Treating People Fairly?: 87% of people who agree that 'the people impacted have been treated fairly' give social permission

Q 'Which of the following best represents your view of that project' **BY** 'The people impacted by the project have been treated fairly'
[asked of those with proposed developments near home, n=833]

Permission
Agree – people impacted treated fairly: 87%
Disagree – people impacted treated fairly: 41%
Impact: +46

	It's a good thing for the community and I support it	I don't like it but I think it is necessary	It's a bad thing for the community and I oppose it	I don't feel I know enough to judge this project	Don't know
Agree-people impacted treated fairly	63%	24%	7%	5%	1%
Disagree	10%	31%	48%	7%	4%

■ Agree-people impacted treated fairly ■ Disagree

Note: 'Don't know' about fair treatment not shown

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Can energy regulators can make a major difference to public support for the energy transition?
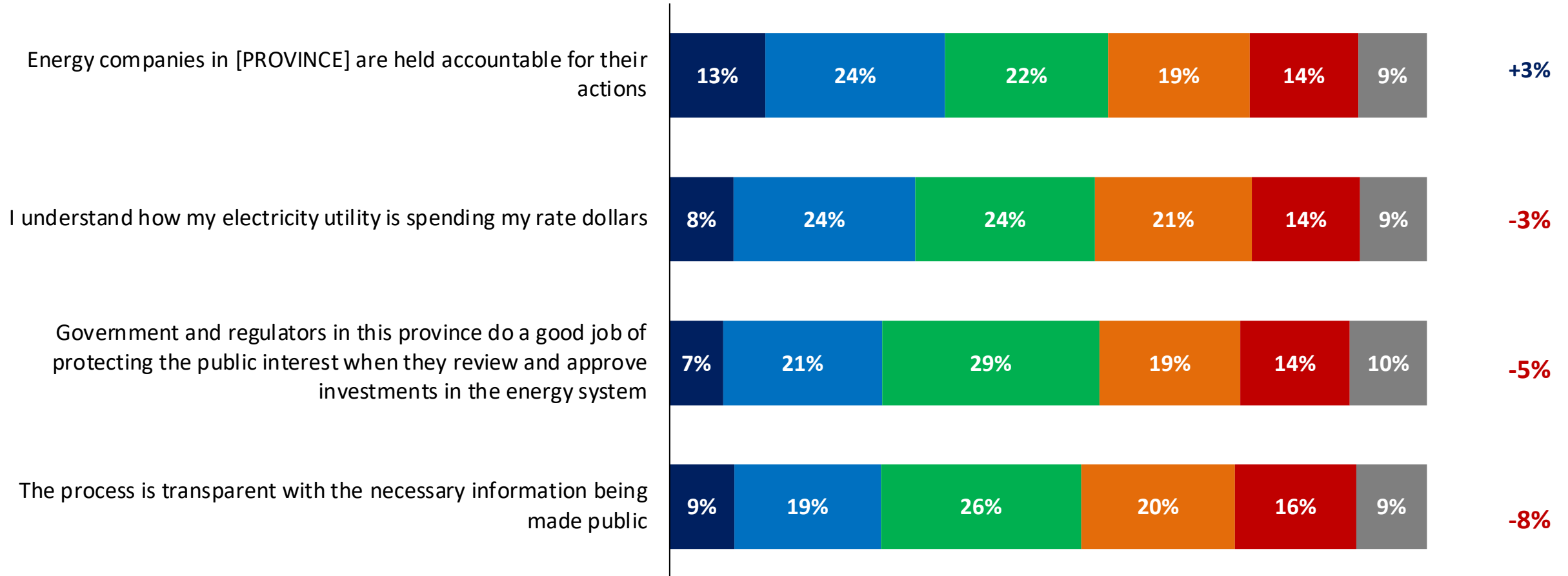
Regulator Attitudes: Canadians are divided on whether key regulatory outcomes are being delivered or not

Q Thinking of approving energy infrastructure and rate increases, do you agree or disagree with the following statements?
[asked of all respondents; n=2,000]

Net Agree

Statement	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know	Net Agree
Energy companies in [PROVINCE] are held accountable for their actions	13%	24%	22%	19%	14%	9%	+3%
I understand how my electricity utility is spending my rate dollars	8%	24%	24%	21%	14%	9%	-3%
Government and regulators in this province do a good job of protecting the public interest when they review and approve investments in the energy system	7%	21%	29%	19%	14%	10%	-5%
The process is transparent with the necessary information being made public	9%	19%	26%	20%	16%	9%	-8%

Legend: ■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

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Willingness to Pay BY Energy Companies are Held Accountable: 55% of those who say energy companies held accountable would pay more

Q Willingness to Pay **BY** Energy Companies are Held Accountable
[asked of all respondents; n=2,000]

Support
Agree – energy companies are held accountable: 55%
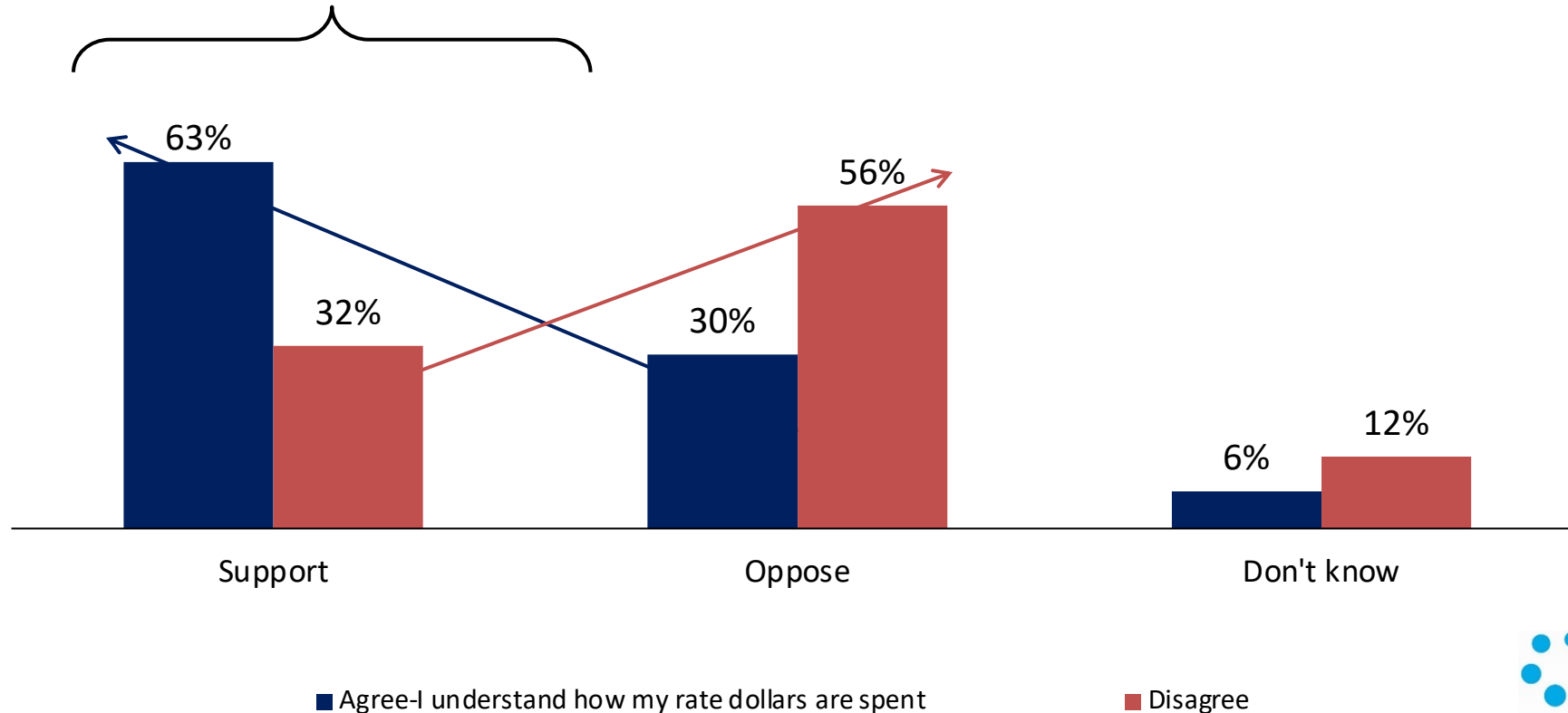**Disagree – energy companies are held accountable:** 38%
Impact: +17

	Support	Oppose	Don't know
Agree-energy companies are held accountable	55%	37%	8%
Disagree	38%	51%	11%

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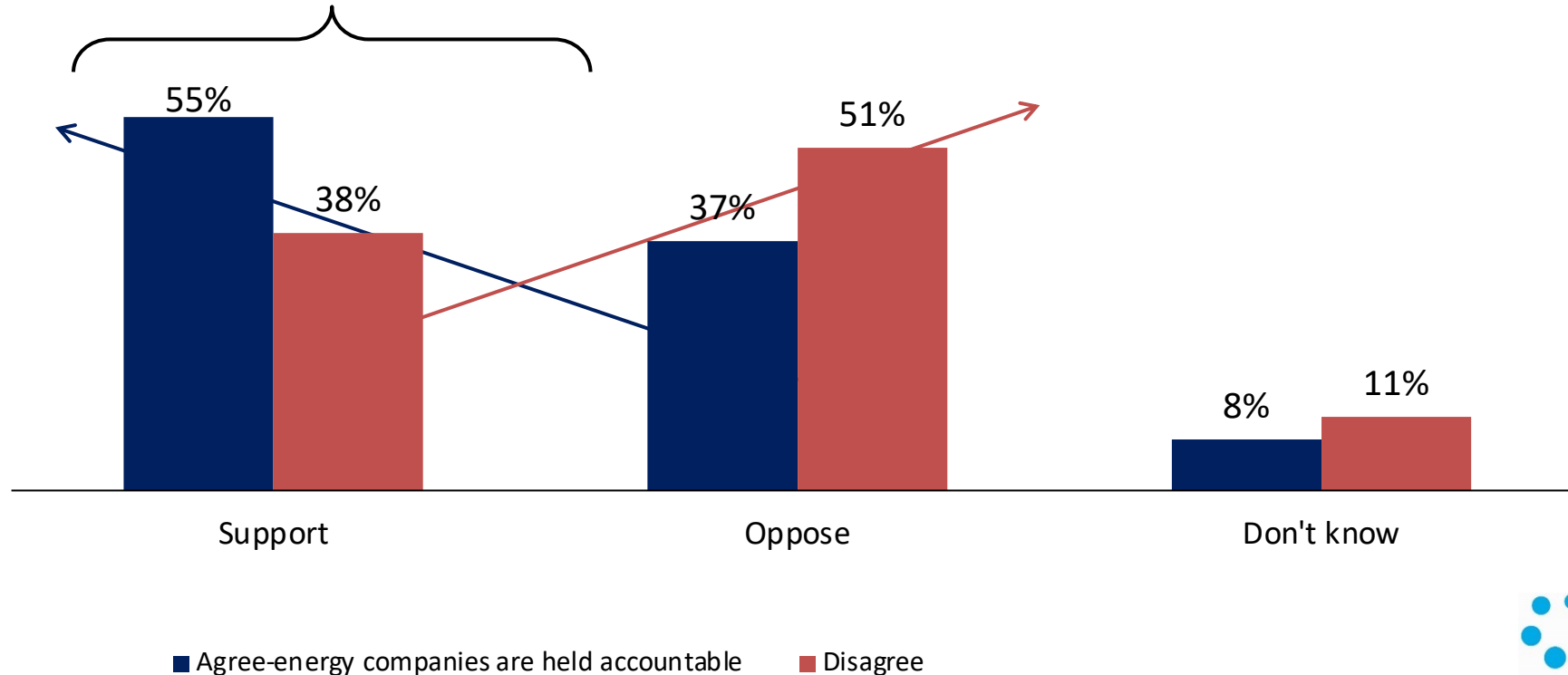
Willingness to Pay BY Understanding Utility Spending: 63% of those who understand how utilities are spending say they would pay more

Q Willingness to Pay **BY** Familiarity on how Consumer Rate Dollars are Spent
[asked of all respondents; n=2,000]

Support
Agree – I understand how my electricity utility is spending my rate dollars: 63%
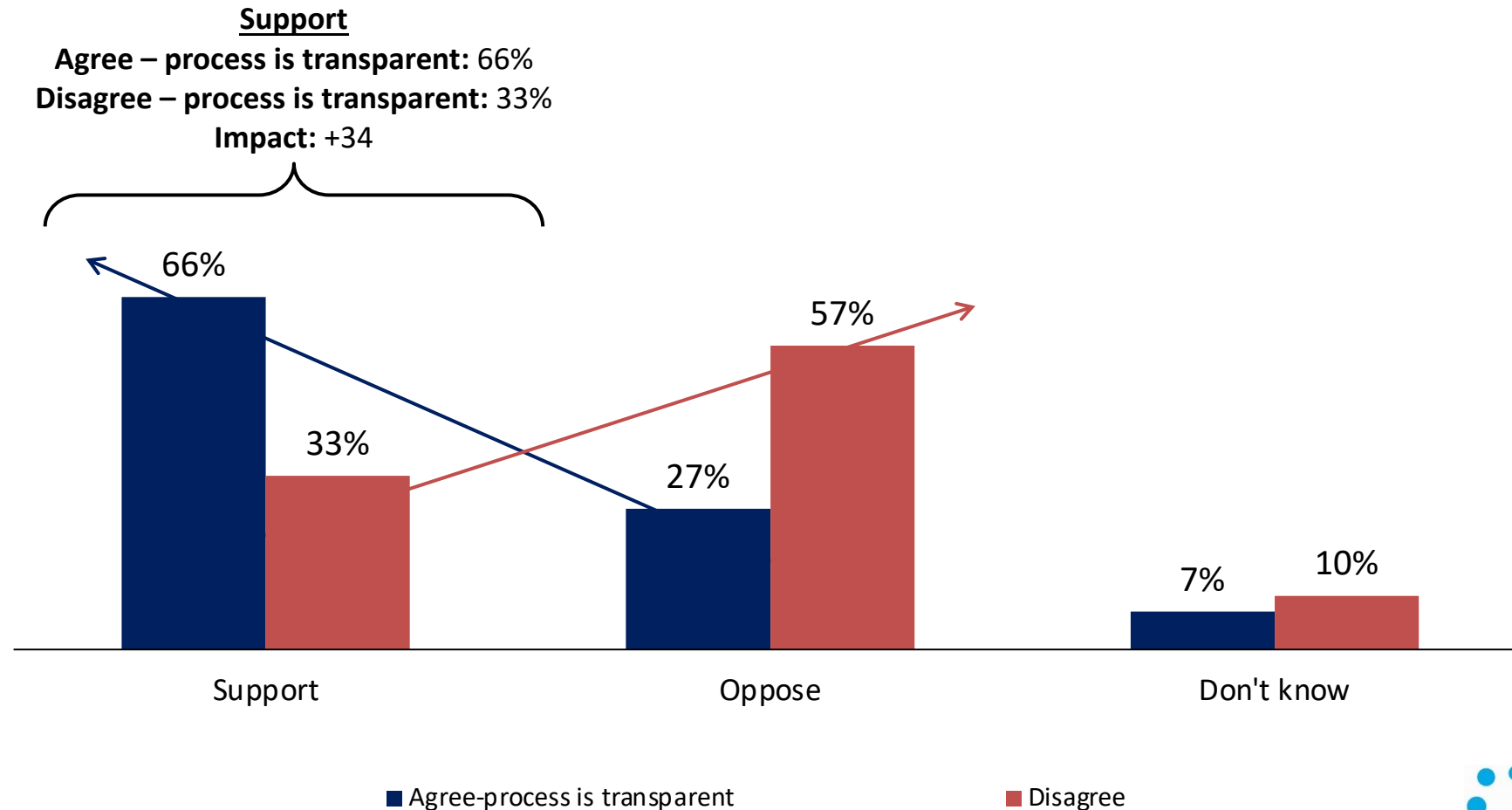**Disagree – I understand how my electricity utility is spending my rate dollars:** 32%
Impact: +32

Support: Agree 63%, Disagree 32%
Oppose: Agree 30%, Disagree 56%
Don't know: Agree 6%, Disagree 12%

■ Agree-I understand how my rate dollars are spent   ■ Disagree

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Willingness to Pay BY Process is transparent: Two thirds (66%) of those who say the process is transparent would pay more

Q Willingness to Pay **BY** Process is transparent
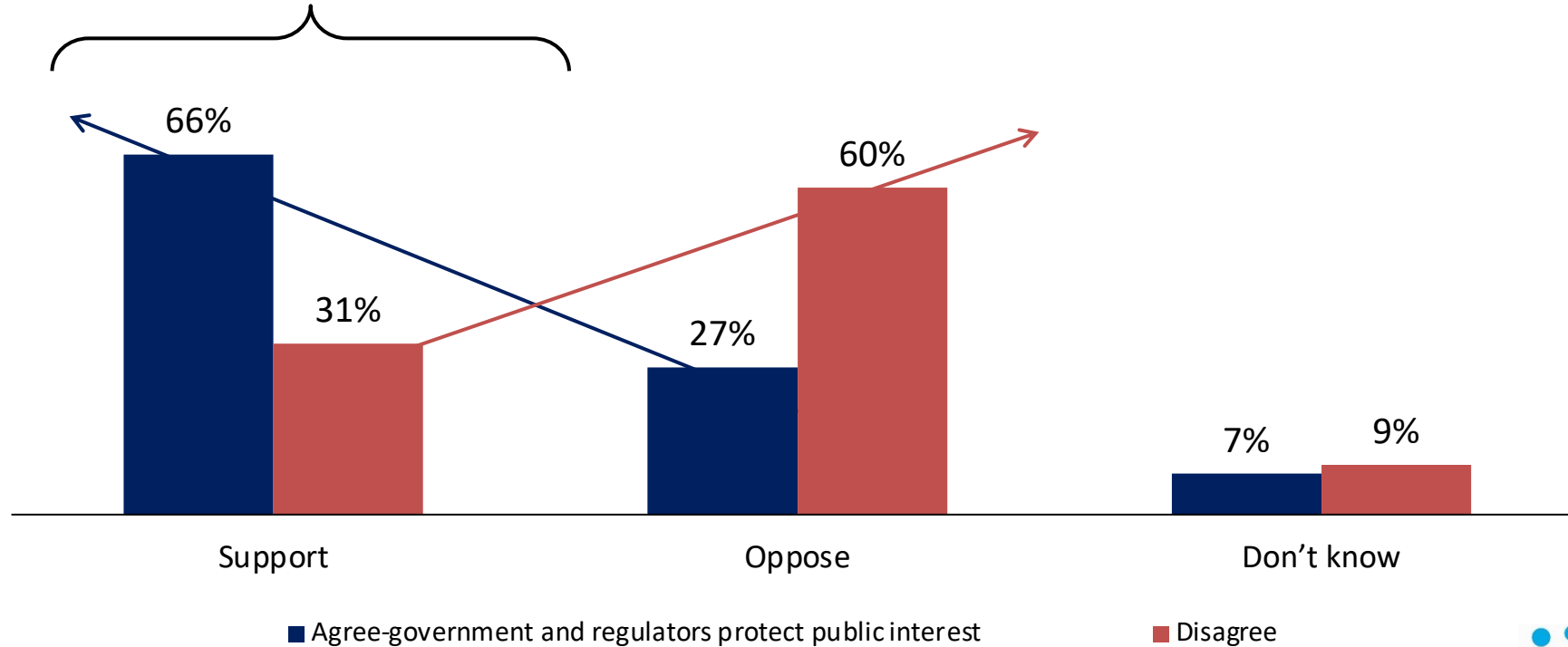[asked of all respondents; n=2,000]

Support
Agree – process is transparent: 66%
Disagree – process is transparent: 33%
Impact: +34

66%

33%

27%

57%

7%

10%

Support

Oppose

Don't know

■ Agree-process is transparent   ■ Disagree

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Willingness to Pay BY Protecting Public Interest: Two thirds (66%) of those who say regulators protect public interest would pay more

Q Willingness to Pay **BY** Protecting Public Interest
[asked of all respondents; n=2,000]

Support
Agree – government and regulators protect public interest: 66%
Disagree – government and regulators protect public interest: 31%
Impact: +34

- Support: 66% / 31%
- Oppose: 27% / 60%
- Don't know: 7% / 9%

■ Agree-government and regulators protect public interest   ■ Disagree

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Summary

01 **Public momentum in favour of action on climate change has been plateaued for most of the last decade. People are not denying the problem, but there are some signs of skepticism towards climate leadership. And willingness to pay is in play.**

02 **Public opinion is not a fundamental problem when it comes to building. When we measure reaction to real projects, the most frequent response is support. When you add those who don't like the projects but feel they are necessary, year after year majorities give permission. But that permission cannot be taken for granted. It must be earned.**

03 **Public opinion on regulatory outcomes makes a big difference in whether people are willing to pay more for the energy transition. People who agree the process is transparent, accountable, and protects consumers are typically twice as willing to pay more for transition than those who disagree.**

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