

# Neighbours 2: Energy and Trade

What make Canadians and American alike,  
and different

Public Opinion Research  
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# Summary

01

Canadians and Americans are conflicted on the energy transition. While Americans and Canadians are concerned about climate change and have a positive impression of the energy transition, they also favour energy self-sufficiency and support developing and exporting oil and gas.

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02

Both Americans and Canadians see free trade agreements as a good way to create economic growth in their country. Additionally, both Canadians and Americans see the existing free trade agreement between the two countries as a good thing and see the export/import of oil and electricity as a good thing.

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03

This survey shows cancelling the IRA divides Americans and may not be an effective election wedge with swing voters, But once elected, cancelling the IRA has some appeal to the Republican base. The US IRA has put pressure on Canadian governments to increase incentives so Canadian corporations can effectively compete for investments in green technologies. If Trump does cancel the IRA, it removes an important factor driving Canadian incentives.

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04

The general idea of raising tariffs has strong appeal among Republicans, but raising taxes on Canadian imports is less popular. Free trade with Canada, including energy imports, is well regarded by Americans. So Canadian interests have a strong case to make for being left out of a general tariff increase. But if Trump wants to raise Canadian tariffs, it will not significantly hurt him with the Republican base, at least not initially.

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# Canadian Survey Methodology

**These are the results of an online survey conducted between June 7<sup>th</sup> and June 11<sup>th</sup>, 2024.**

**Method:** This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Dynata, a leading provider of online sample. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.

**Sample Size:** n= 1,733 general population, 18 years or older. The results are weighted to n=1,500 based on Census data from Statistics Canada.

**Field Dates:** June 7<sup>th</sup> to June 11<sup>th</sup>, 2024.

**Weighting:** Results for Canada are weighted by age, gender, education, region and past federal vote to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

**Margin of Error:** This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

**Note:** Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
<b>Men 18-34</b>	175	10.1%	202	13.5%
<b>Men 35-54</b>	264	15.3%	240	16.1%
<b>Men 55+</b>	324	18.8%	284	19.0%
<b>Women 18-34</b>	231	13.4%	198	13.3%
<b>Women 35-54</b>	348	20.2%	251	16.8%
<b>Women 55+</b>	384	22.2%	318	21.3%
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<b>BC</b>	251	14.5%	209	13.9%
<b>Alberta</b>	221	12.8%	168	11.2%
<b>Prairies</b>	104	6.0%	96	6.4%
<b>Ontario</b>	673	38.8%	580	38.7%
<b>Quebec</b>	371	21.4%	346	23.1%
<b>Atlantic</b>	113	6.5%	101	6.7%

# American Survey Methodology

These are the results of an online survey conducted between June 7<sup>th</sup> and June 17<sup>th</sup>, 2024.

**Method:** This online survey was conducted using Dynata, a leading provider of online sample. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual American population according to Census data to provide results that are intended to approximate a probability sample.

**Sample Size:** n=2,946 registered voters, 18 years or older. The results are weighted to n=2,000 based on Census and Current Population Survey data for all adults, with those who report not being registered screened out. Four potential tipping point states were oversampled to n=300 each (North Carolina, Pennsylvania, Georgia and Minnesota)

**Field Dates:** June 7<sup>th</sup> to June 17<sup>th</sup>, 2020.

**Weighting:** Results for all American adults are weighted by age, gender, education, race, past presidential vote, and region to ensure that the overall sample's composition reflects that of the actual population according to Census and population survey data; in order to provide results that are intended to approximate a probability sample. Respondents who report not being registered to vote were screened out of the final sample. Weighted and unweighted frequencies are reported in the table.

**Margin of Error:** This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

**Note:** Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

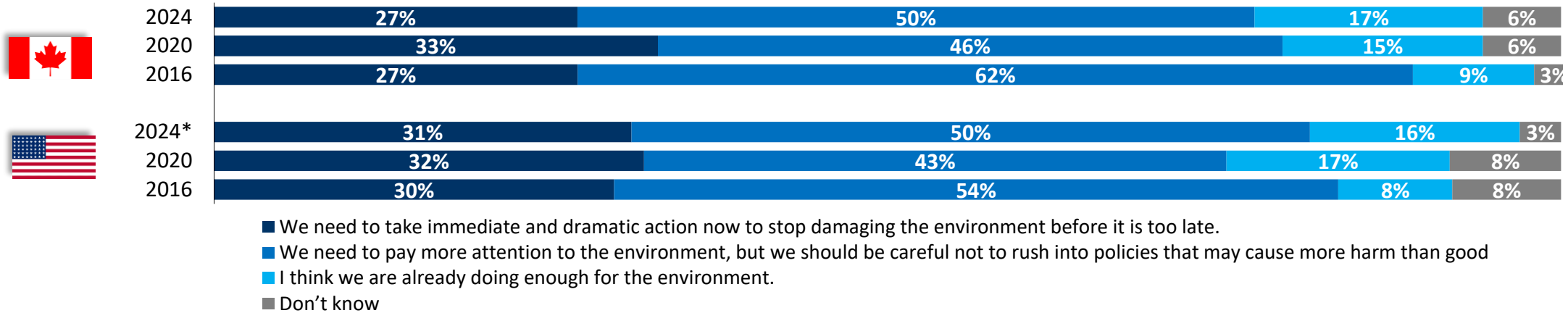
	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
<b>Men 18-34</b>	225	7.7%	195	9.7%
<b>Men 35-54</b>	460	15.6%	321	16.1%
<b>Men 55+</b>	656	22.3%	424	21.2%
<b>Women 18-34</b>	223	7.6%	177	8.9%
<b>Women 35-54</b>	563	19.1%	346	17.3%
<b>Women 55+</b>	813	27.7%	534	26.7%
<b>Region</b>				
<b>Northeast</b>	549	18.6%	361	18.1%
<b>Midwest</b>	707	24.0%	446	22.3%
<b>South</b>	1261	42.8%	768	38.4%
<b>West</b>	429	14.6%	425	21.3%

# Canada vs US - Environment

# Environment: In 2024, both Canadians and Americans prioritize the economy over the environment; a 9-point rise since 2016 among Americans

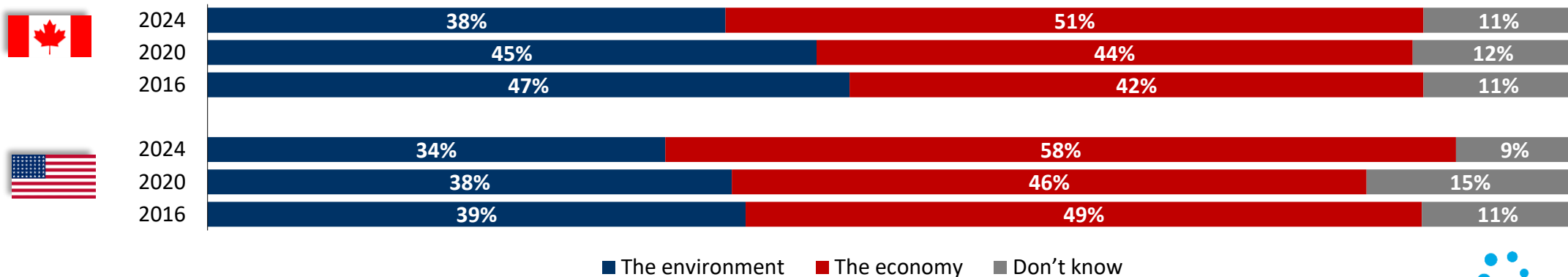
Q Which of the following statements best describes your personal point of view?

[asked of all respondents; Canada n=1,500, United States n=2,000]



Q When it comes to trade-offs between the environment and the economy, which is more important to you?

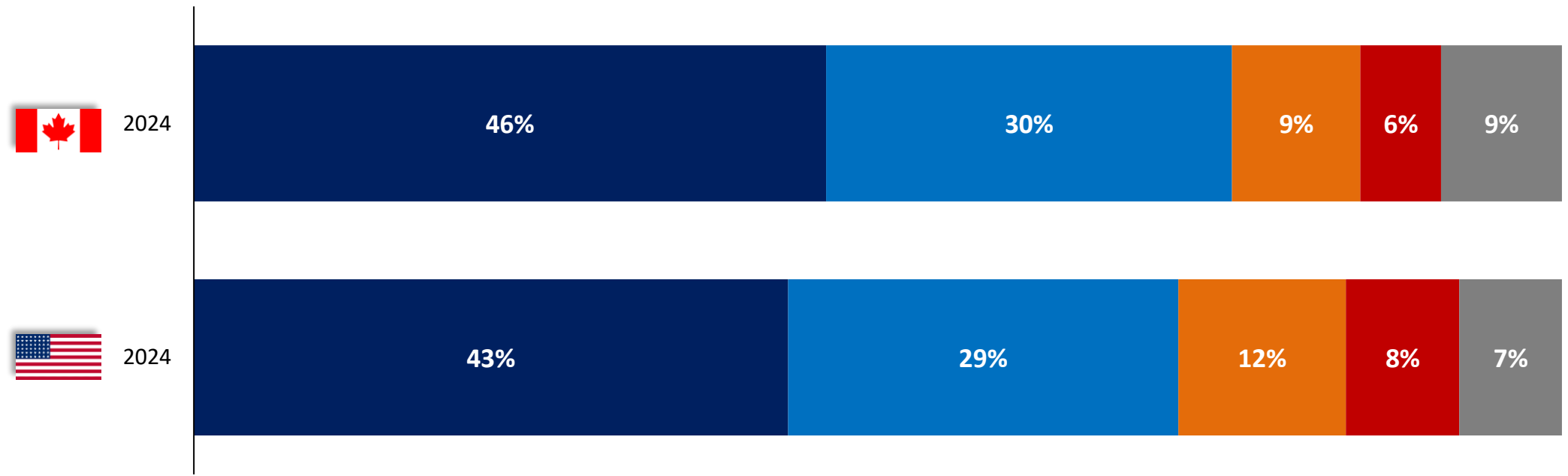
[asked of all respondents; Canada n=1,500, United States n=2,000]



# Climate Change: Both Canadians (76%) and Americans (72%) believe that human activity is the cause of climate change <sup>7</sup>



Thinking about your own personal view, do you believe that...  
[asked of all respondents; Canada n=1,500, United States n=2,000]

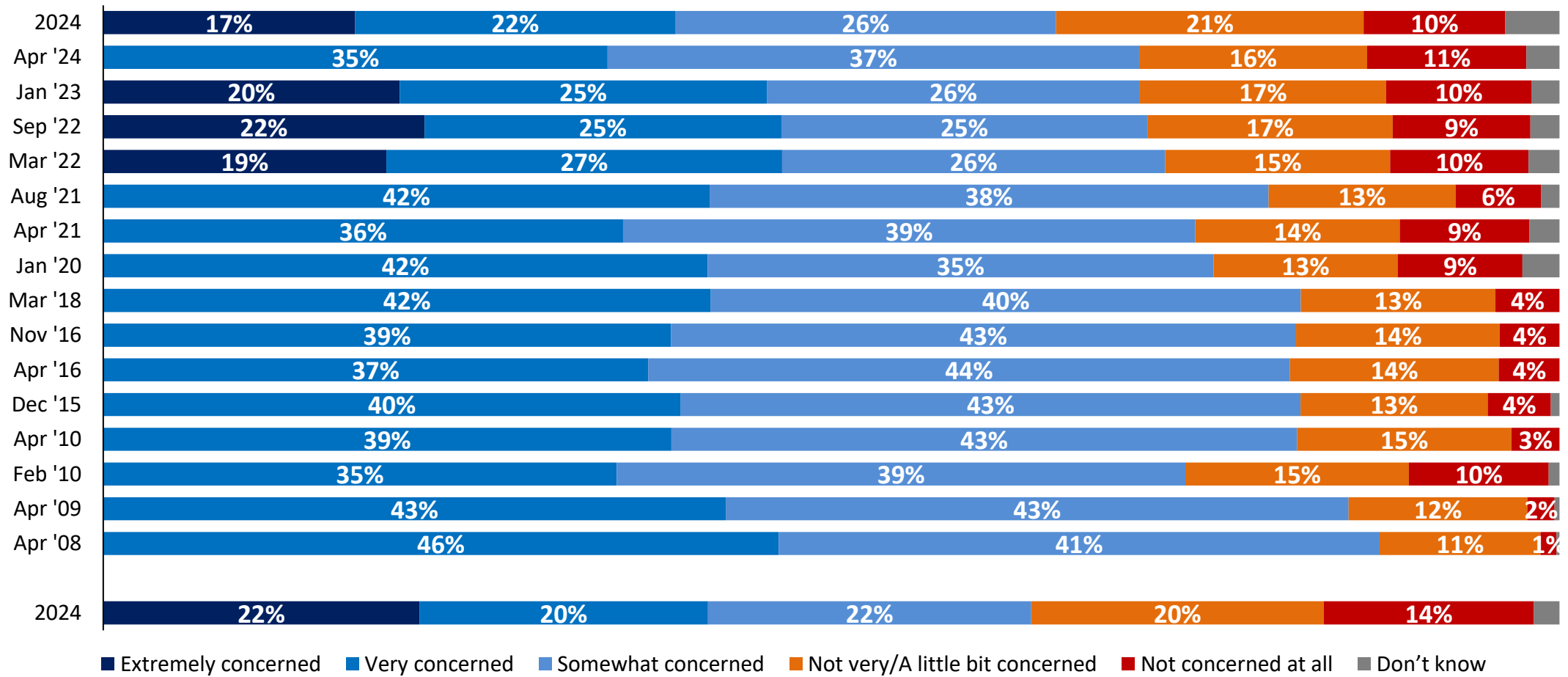


- Human activity is definitely driving climate change
- Human activity is probably driving climate change
- Human activity is probably not driving climate change
- Human activity is definitely not driving climate change
- Don't know

# Concern with Climate Change: 65% of Canadians are at least somewhat concerned about climate change, a 12-point decrease from 2020 (77%)



How concerned are you about climate change?  
 [asked of all respondents; Canada n=1,500, United States n=2,000]



**NOTE:** For tracking in Canada, prior to 2010, the term “global warming” was used in place of “climate change.” Prior to 2024, results only show who believe climate change is occurring. Extremely concerned’ was recently added in March 2022.

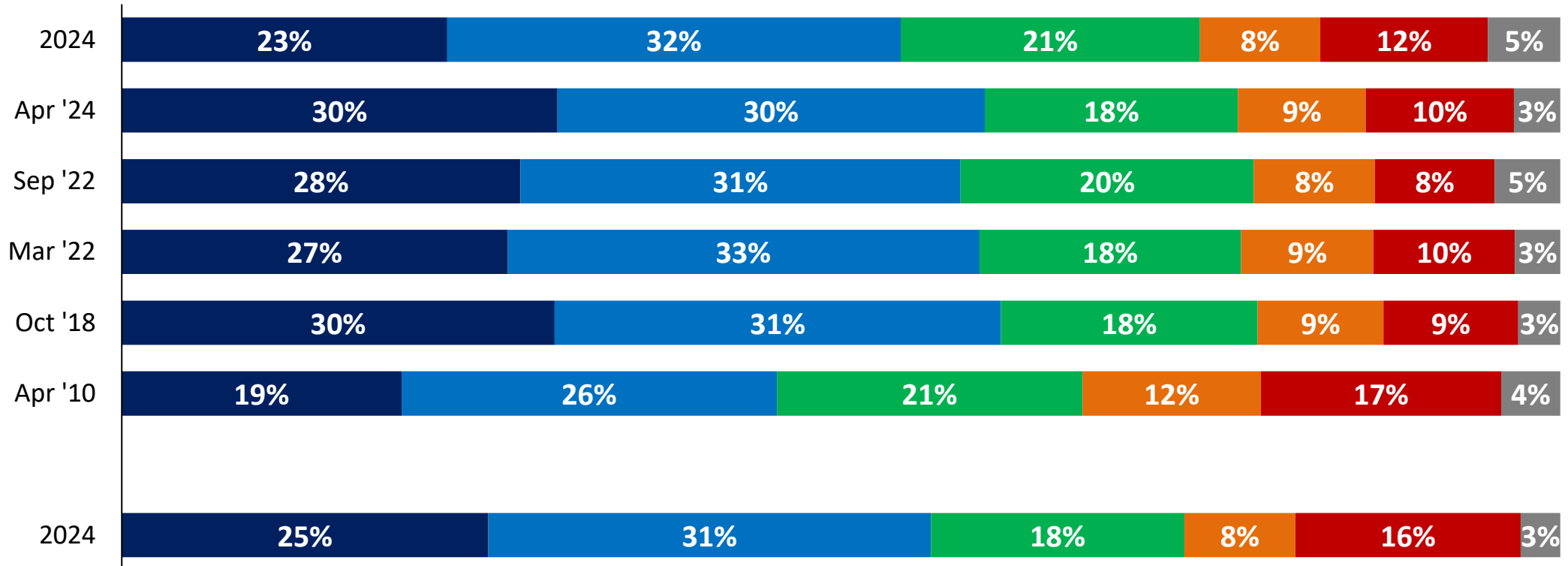


# Proof of Climate Change: More Canadians (56%) in 2024 have stated personal experiences proving evidence of climate change than in 2010 (45%)



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; Canada n=1,500, United States n=2,000]



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

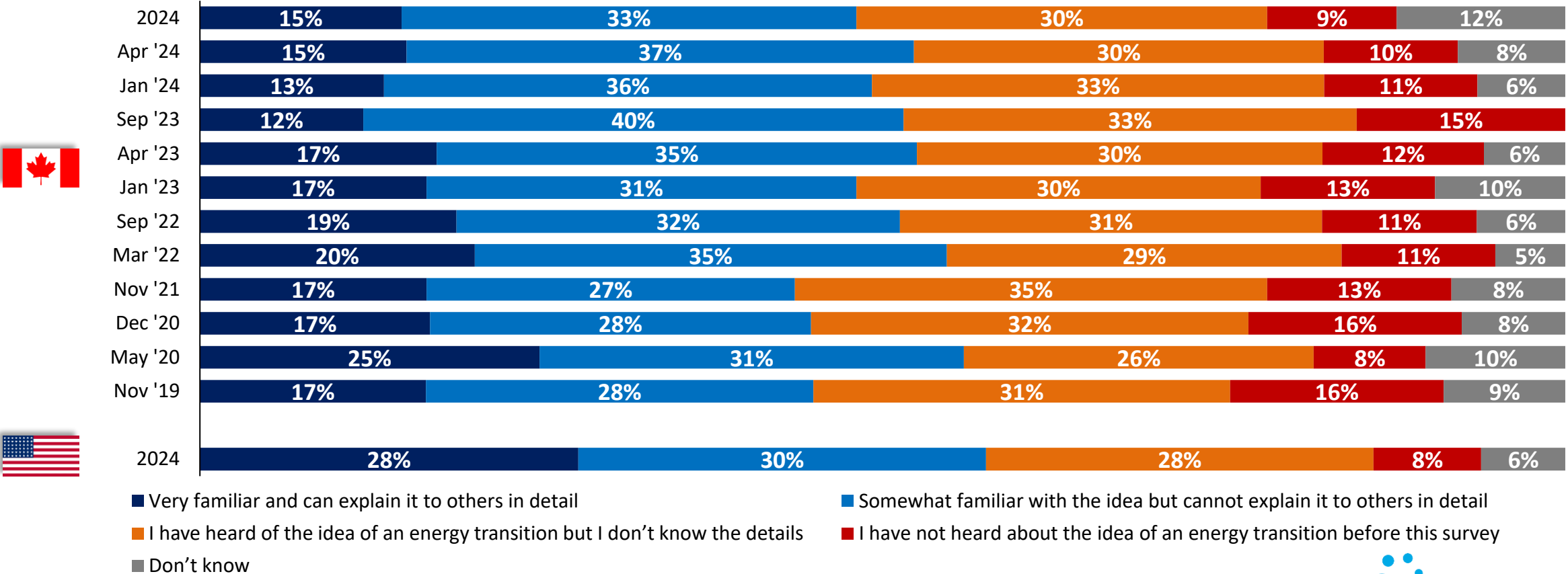
# Energy Transition Familiarity: in 2024, more Americans (58%) are familiar with the energy system transition idea than Canadians (48%)



One issue people have been talking about lately is the idea that [COUNTRY] 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; Canada n=1,500, United States n=2,000]



NOTE: "Don't know" was not included as an option when asked in September 2023. In addition, wording for two response options are slightly different from November 2019 to April 2023 i.e. "Very familiar and can explain it to others in detail" was "I understand the details and can explain them to others" while "Somewhat familiar with the idea but cannot explain it others" was "I am familiar with the idea of an energy transition but cannot explain it to others".

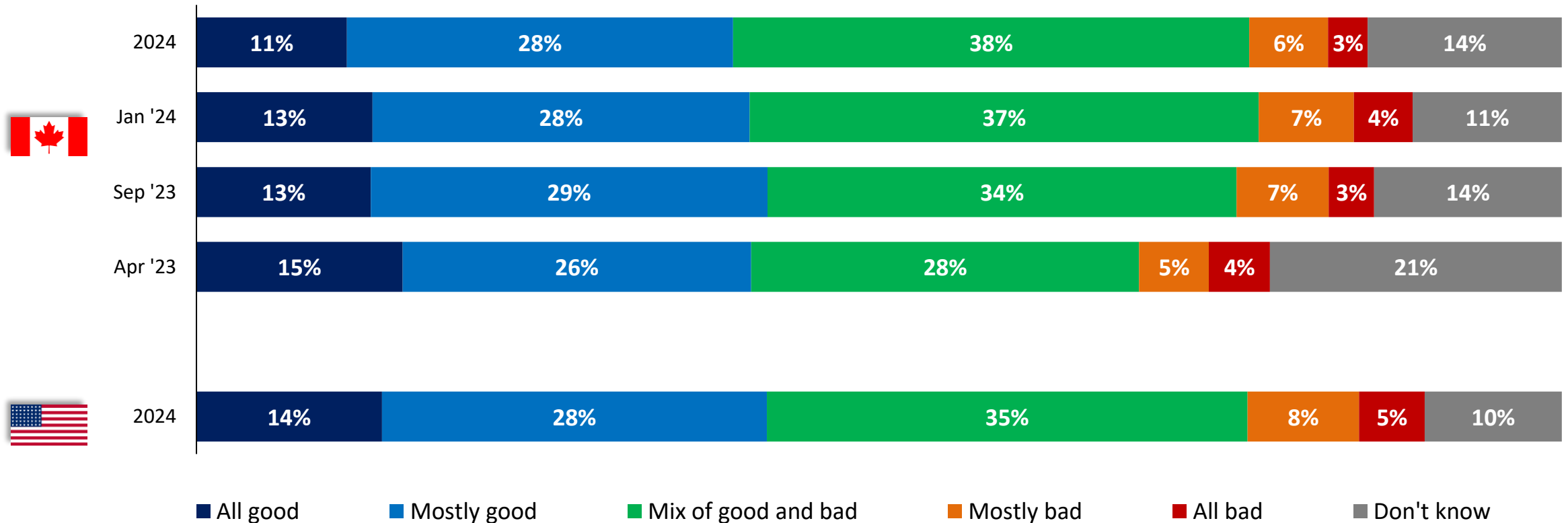


# Energy Transition Impression: Compared to Canadians (39%), slightly more Americans (42%) say energy transition sounds like a good thing



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; Canada n=1,500, United States n=2,000]



# Exploring Energy Transition Attitudes

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

Pro-Oil Statements	Pro-Transition Statements
It is critical to [COUNTRY]'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.
[COUNTRY] 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 [COUNTRY] to add to the problem by developing new oil and gas projects.
It makes no sense to leave [COUNTRY]'s oil and gas in the ground because if Canada doesn't meet the global demand, another country will.	
Neutral Statements	
It is important to me that [COUNTRY] is self-sufficient in energy.	I don't care where we get energy from so long as it is at the lowest price.

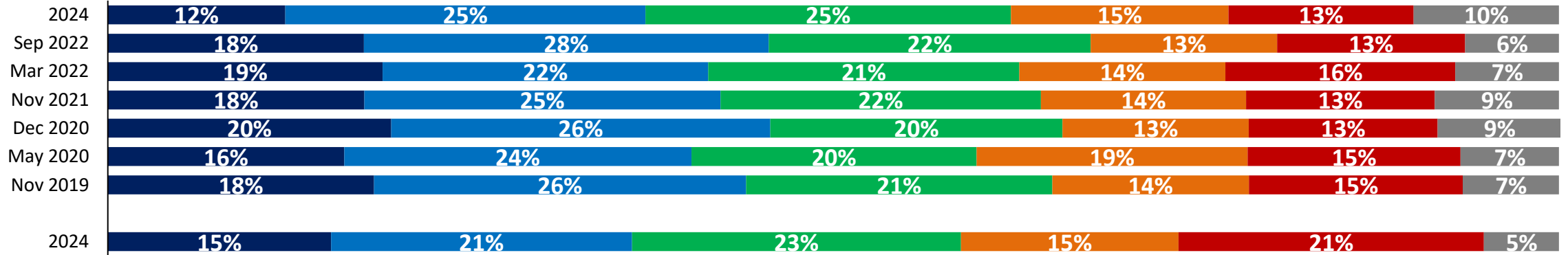
# Pro-Energy Transition: More Americans than Canadians agree that the world is facing a climate emergency



Do you agree or disagree with the following statements?

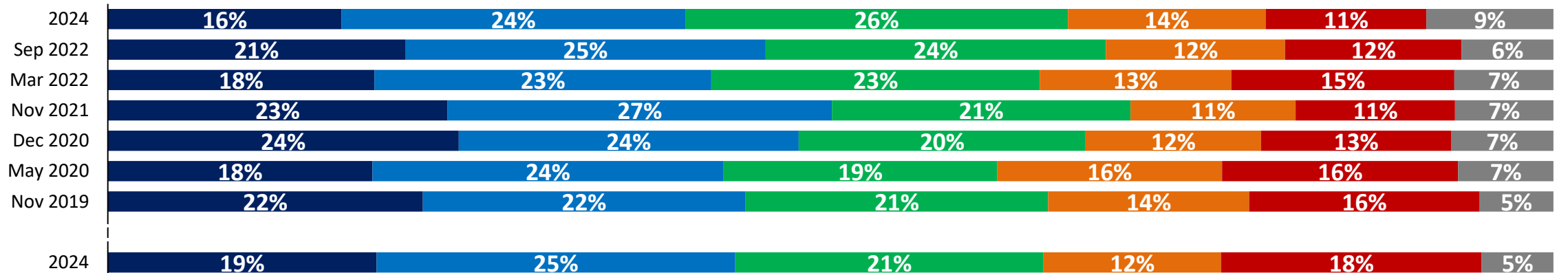
[asked of all respondents; Canada n=1,500, United States n=2,000]

**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.**



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

**The world is facing a climate emergency and it is irresponsible of [COUNTRY] to add to the problem by developing new oil and gas projects.**



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

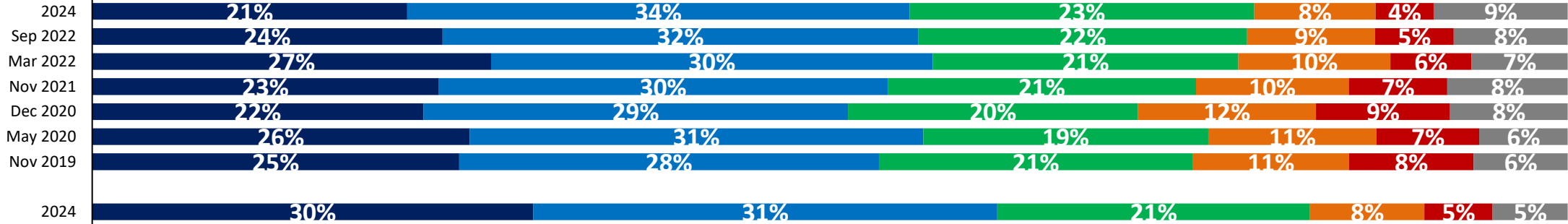
# Pro-Oil: More than half of Canadians and Americans agree that its critical for their country to responsibly develop and export oil/gas resources



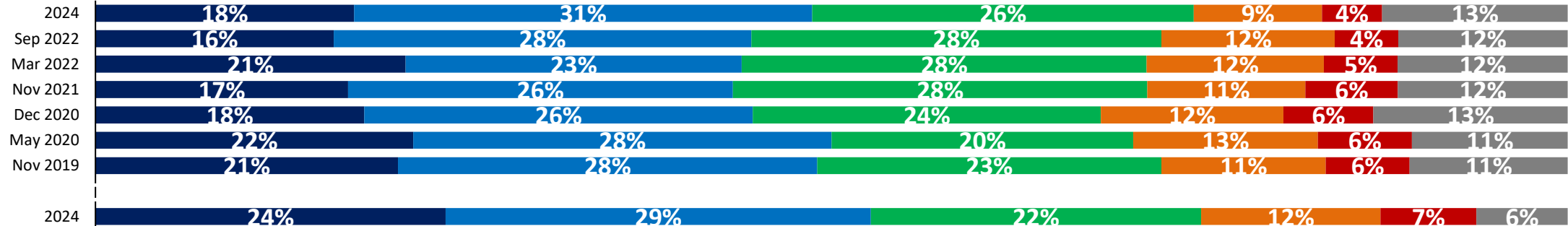
Do you agree or disagree with the following statements?

[asked of all respondents; Canada n=1,500, United States n=2,000]

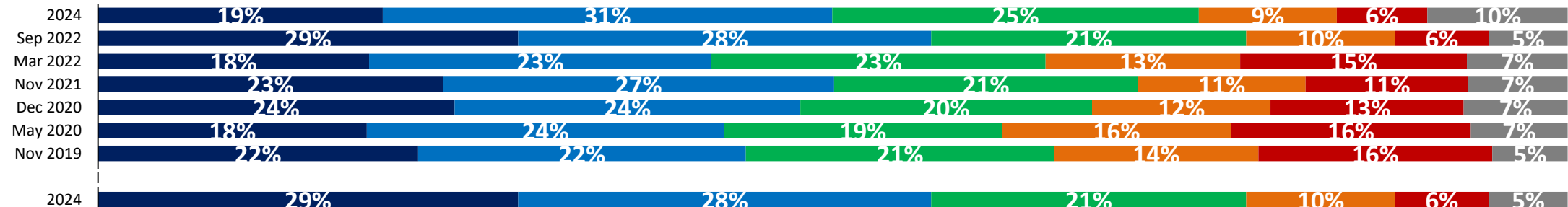
*It is critical to [COUNTRY]'s' ongoing prosperity that we responsibly develop and export our oil and gas resources.*



*[COUNTRY] is one of the most responsible countries in the world when it comes to how we develop and export our oil and gas resources.*



*It makes no sense to leave [COUNTRY]'s oil and gas in the ground because if [COUNTRY] doesn't meet the global demand, another country will.*



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

# Neutral Statements: More Americans (84%) believe it is important for their country to be self-sufficient in energy compared to Canadians (76%)



Do you agree or disagree with the following statements?

[asked of all respondents; Canada n=1,500, United States n=2,000]

*It is important to me that [COUNTRY] is self-sufficient in energy.*



2024



2024



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

*I don't care where we get energy from so long as it is at the lowest price*



2024



2024



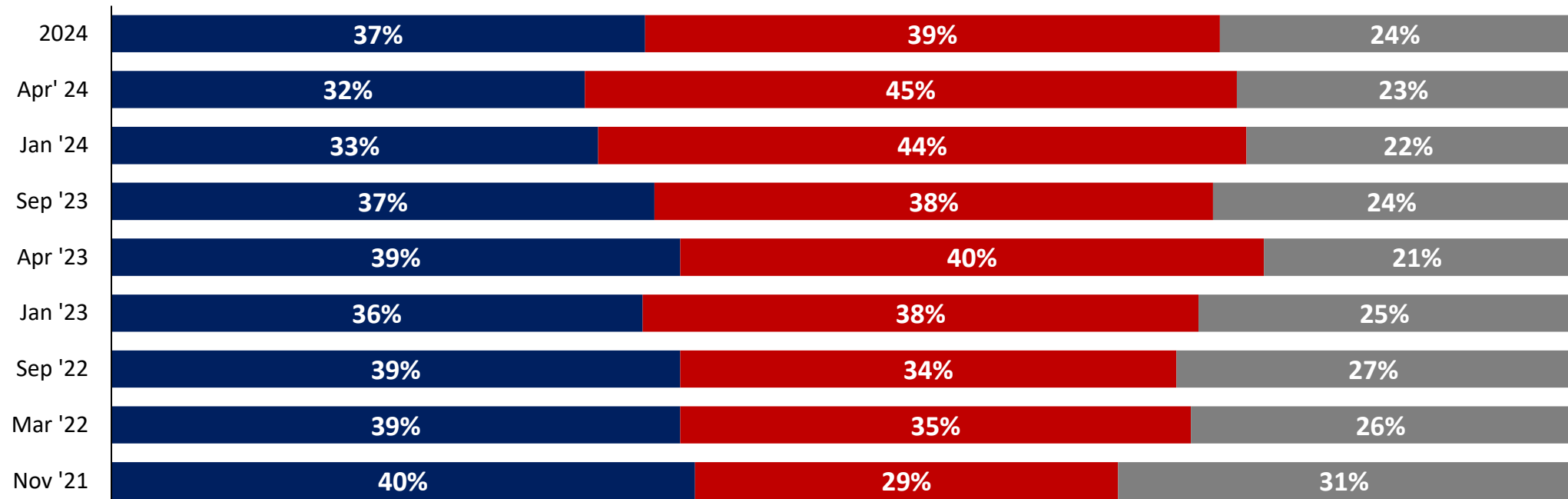
■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

# Energy Transition: Almost half of Americans & more than a third of Canadians believe policies to transition from oil/gas aren't likely to impact climate change

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; Canada n=1,500, United States n=2,000]



- Government policies to accelerate the transition away from oil and gas show that [COUNTRY] 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 [COUNTRY], and aren't likely to have a significant impact on climate change.
- Don't know

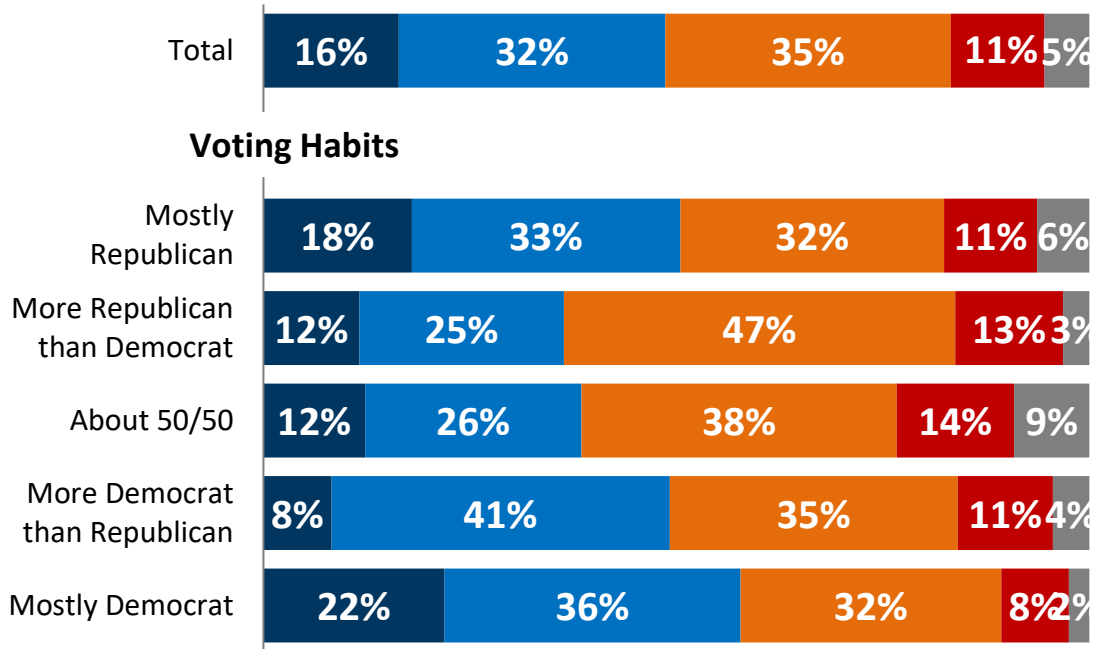


**IRA**



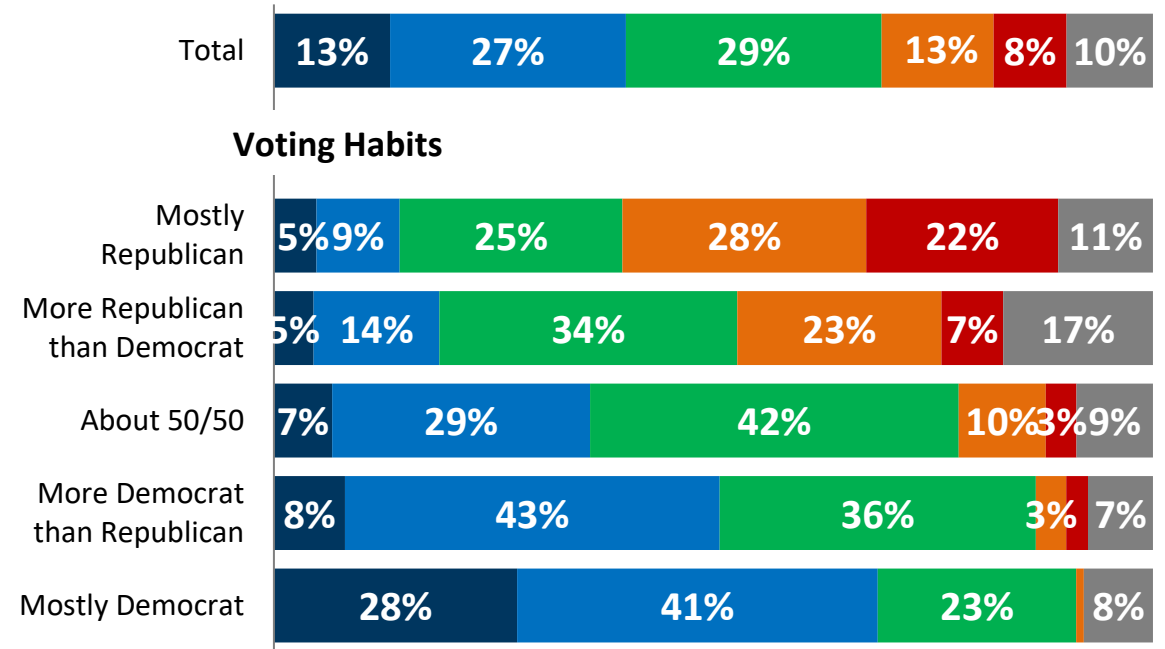
# Familiarity and Impression of the IRA: Those who mostly vote Democrat like the IRA (69%) while mostly Republican voters do not (14%)

**Q** How familiar are you with the Inflation Reduction Act passed by Congress and signed by President Biden?  
 [asked of all respondents; United States n=2,000]



- Very familiar and can explain it to others in detail
- I am familiar with the act but cannot explain it to others in detail
- I have heard of the act, but I don't know the details
- I have not heard about the act before this survey
- Don't know

**Q** From what you have read, seen or heard about the Inflation Reduction Act, do you feel it is a good thing or a bad thing?  
 [asked of respondents who have heard of the act; United States n=1,664]



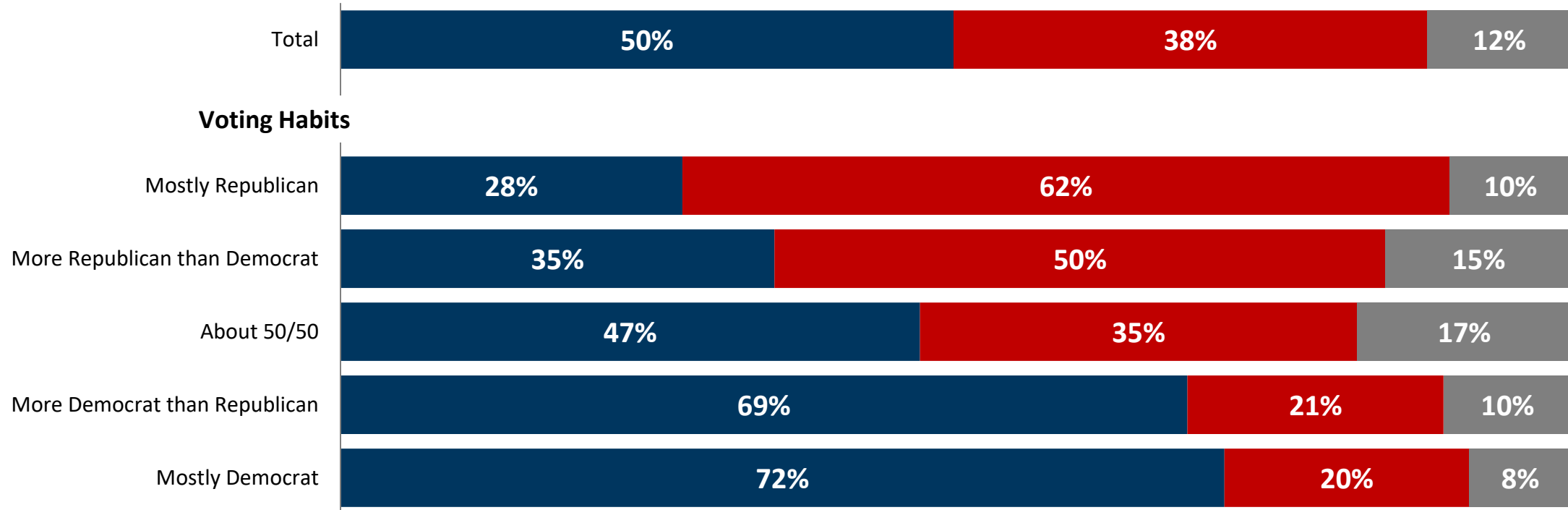
- All good
- Mostly good
- Mix of good and bad
- Mostly bad
- All bad
- Don't know

# IRA Perspective: 62% of those who usually vote Republicans believe the gov't should fund other priorities such as tax cuts instead of providing incentives



One part of the Inflation Reduction Act includes providing companies with incentives to reduce carbon emission and to invest in clean energy sources. Which is closer to your point of view?

[asked of all respondents; United States n=2,000]



■ The federal government should continue to provide companies with incentives to reduce carbon emission and to invest in clean energy sources.

■ The federal government should cancel these incentives to companies and use that fund to fund other priorities such as tax cuts, deficit reduction or improvements to social programs.

■ Don't know

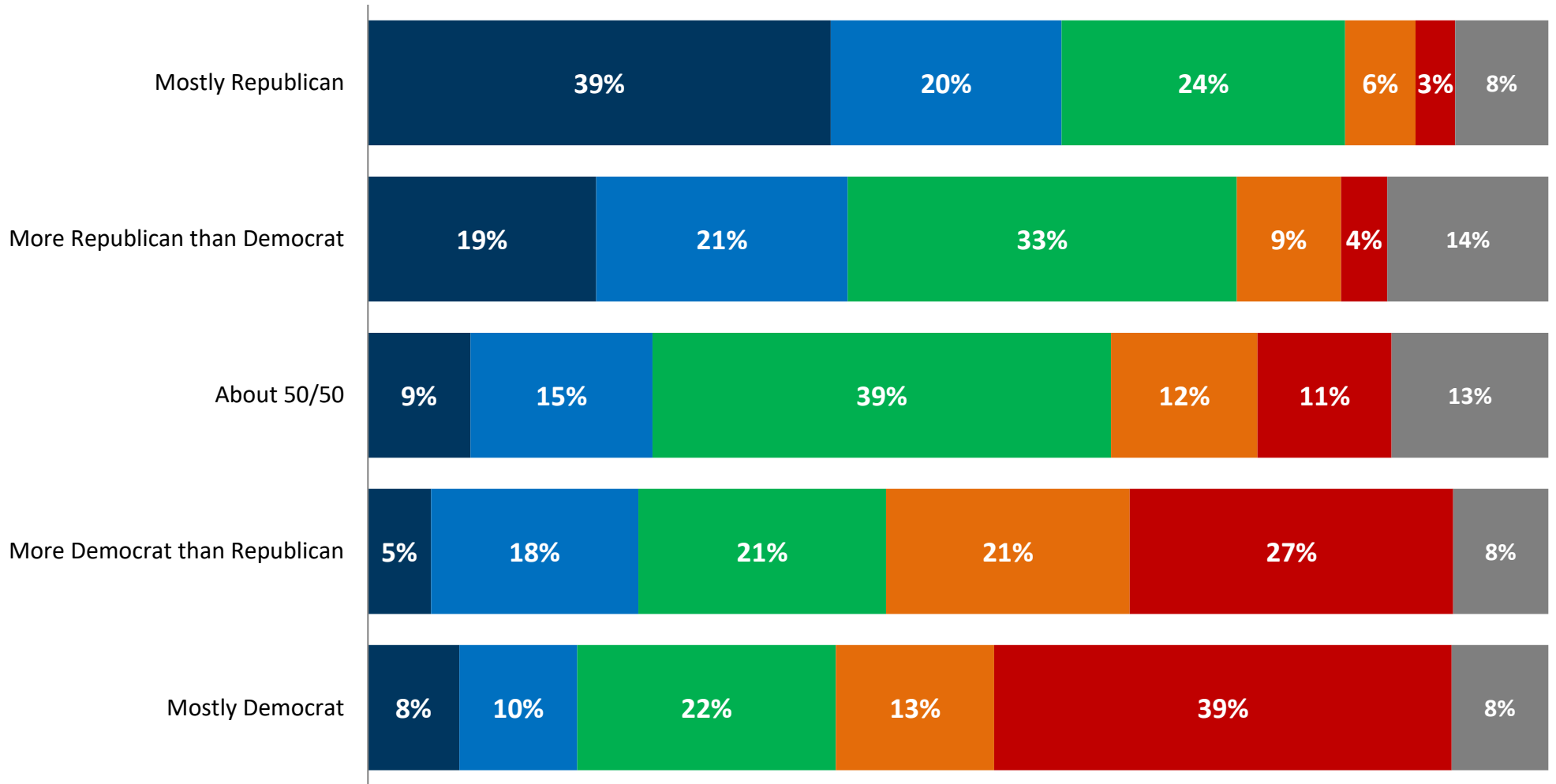
# Trade Policies BY Voting Habits: More than half of those who mostly vote Republican want to cancel the Inflation Reduction Act



Below is a list of policies the federal government could adopt. For each policy, please indicate if you support or oppose that.

[asked of all respondents; United States n=2,000]

## Cancel the Inflation Reduction Act

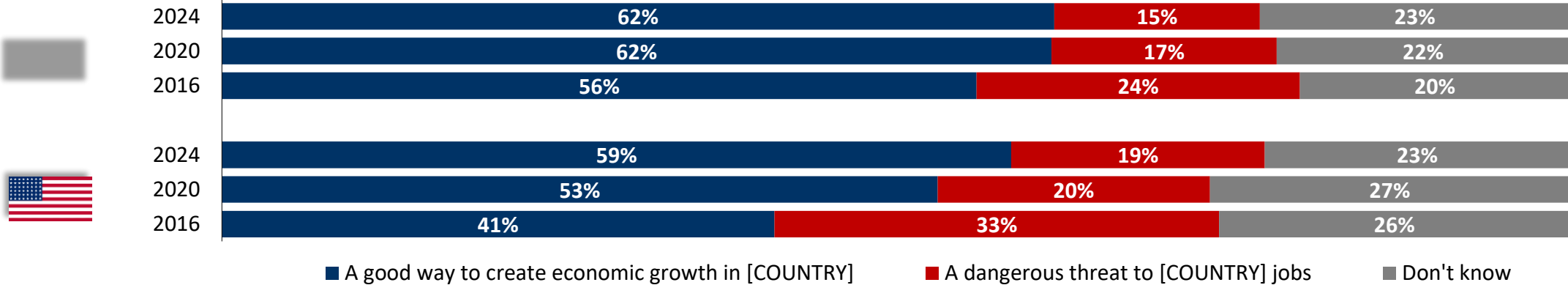


■ Strongly Support ■ Somewhat Support ■ Neither support nor oppose ■ Somewhat oppose ■ Strongly oppose ■ Don't know

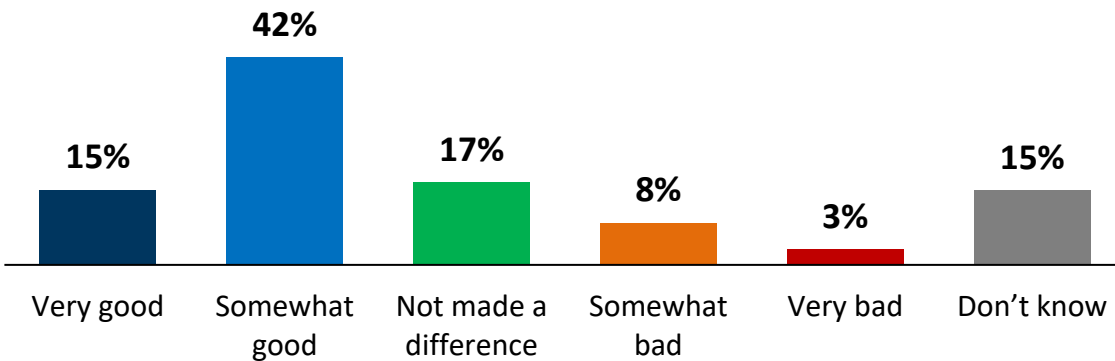
# Canada vs US - Trade

# Free Trade: More than half of Canadians and Americans believe free trade with each other has been a good thing for their country

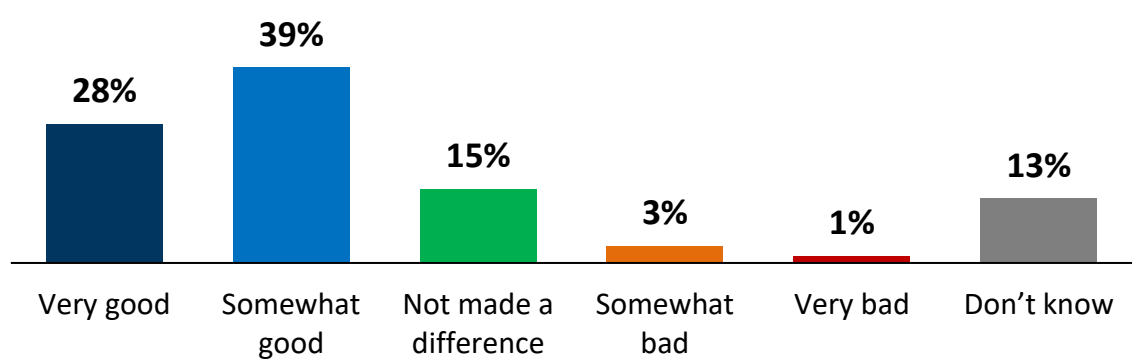
**Q** Which statement is closer to your point of view? Free trade agreements are...  
[asked of all respondents; Canada n=1,500, United States n=2,000]



**Q** Canada has a free trade agreement with the United States. Do you think free trade with the United States has generally been a good thing for Canada or a bad thing for Canada?  
[asked of all respondents; Canada n=1,500]



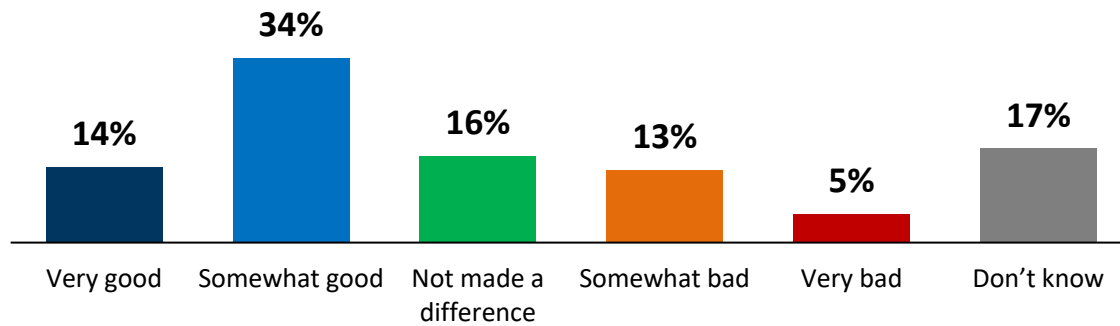
**Q** The United States currently has a free trade agreement with Canada. Do you think free trade with Canada has generally been a good thing for America or a bad thing for America?  
[asked of all respondents; United States n=2,000]



# Free Trade: Both Canadians and Americans see the imports/exports of oil and electricity as more of a good thing than bad thing for their country

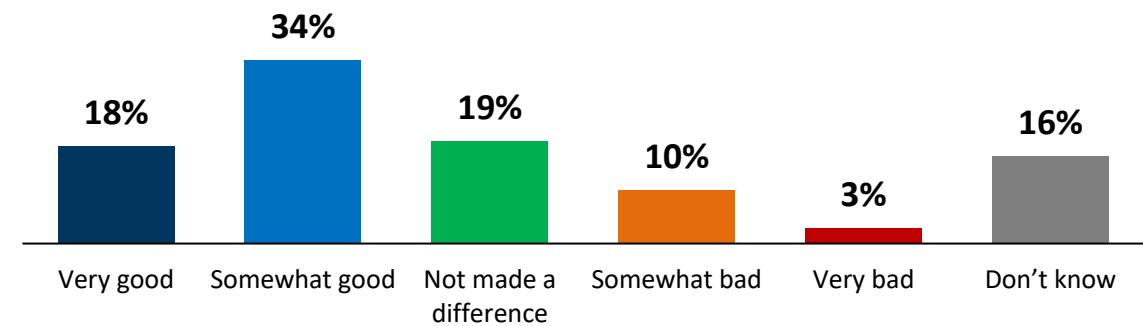
**Q** Canada currently exports electricity to the United States. Do you think exporting electricity to the United States has generally been a good thing for Canada or a bad thing for Canada?

[asked of all respondents; Canada n=1,500]



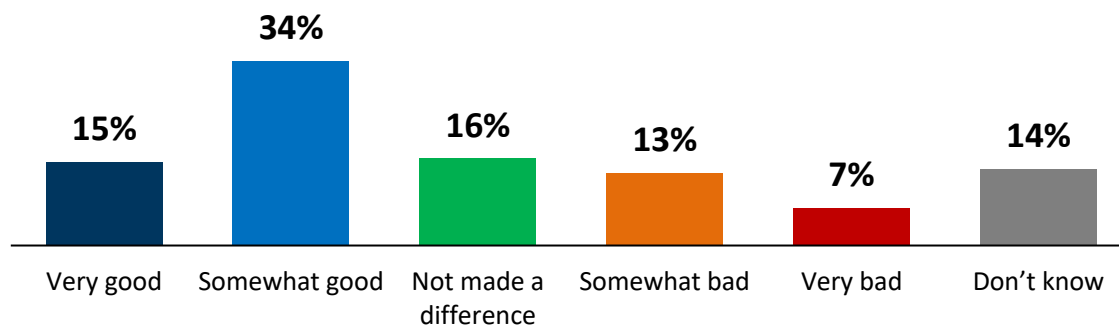
**Q** The United States currently imports electricity from Canada. Do you think importing electricity from Canada has generally been a good thing for America or a bad thing for America?

[asked of all respondents; United States n=2,000]



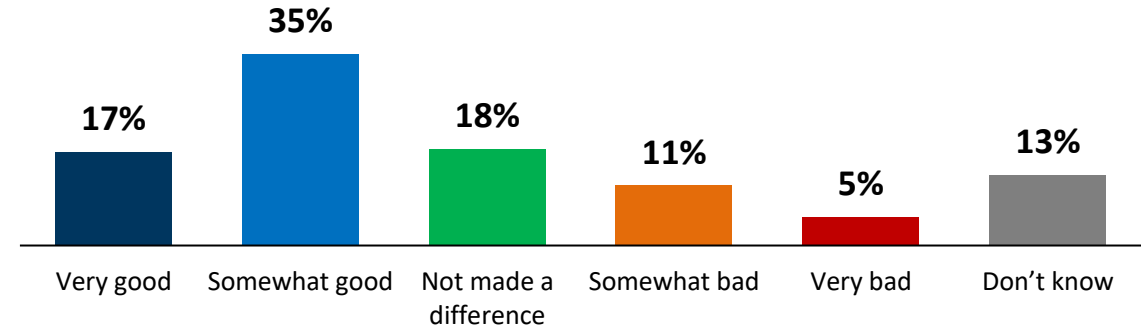
**Q** Canada currently exports oil to the United States. Do you think exporting oil to the United States has generally been a good thing for Canada or a bad thing for Canada?

[asked of all respondents; Canada n=1,500]



**Q** The United States currently imports oil from Canada. Do you think importing oil from Canada has generally been a good thing for America or a bad thing for America?

[asked of all respondents; United States n=2,000]



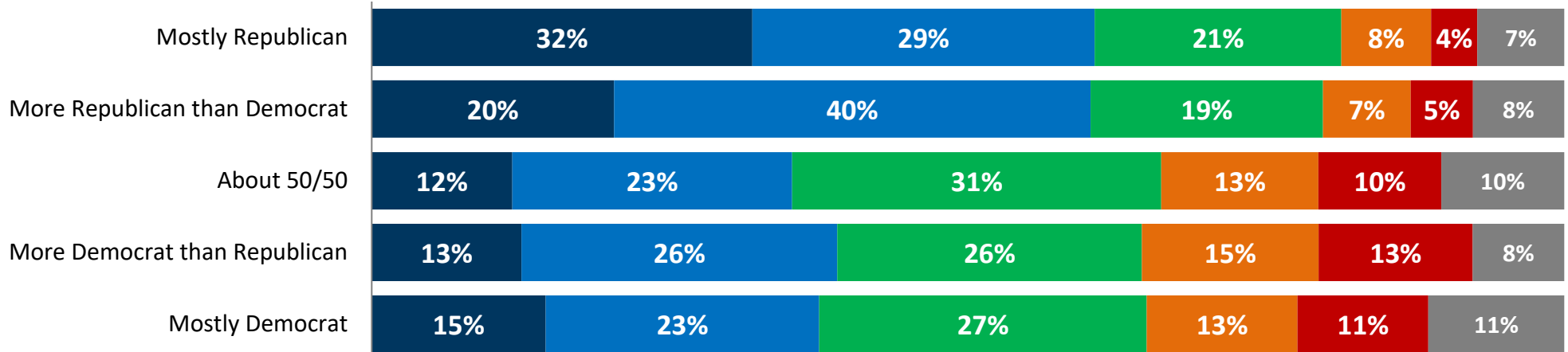
# Trade Policies BY Voting Habits: More Republican voters support than oppose a 10% tariff on imports from Canada



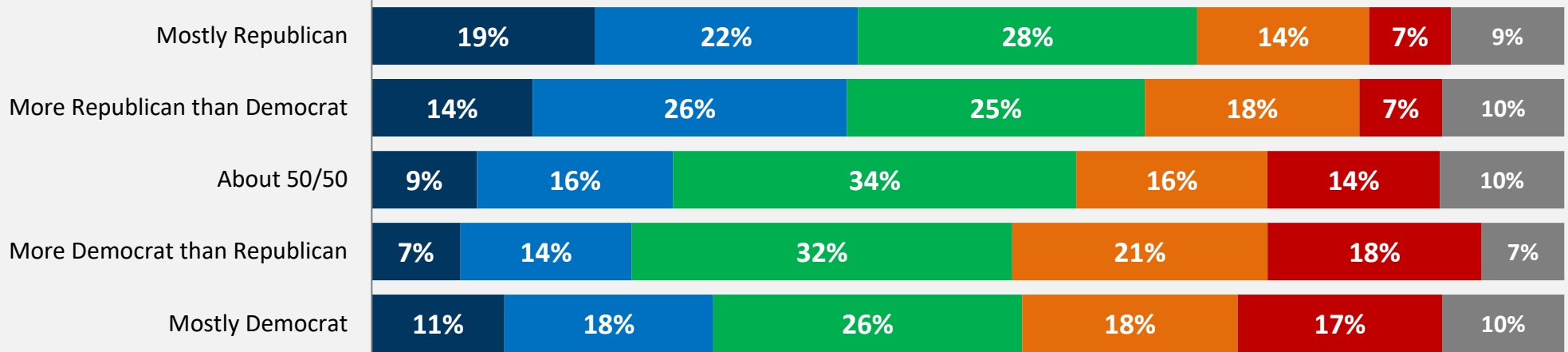
Below is a list of policies the federal government could adopt. For each policy, please indicate if you support or oppose that.

[asked of all respondents; United States n=2,000]

**Raise tariffs on all foreign imports by 10% across the board**



**Raise tariffs on imports from Canada by 10% across the board**



■ Strongly Support 
 ■ Somewhat Support 
 ■ Neither support nor oppose 
 ■ Somewhat oppose 
 ■ Strongly oppose 
 ■ Don't know





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**Building Understanding.**