

Canada This Month Iran Conflict & Canadian Oil and Gas

Public Opinion Research
Release Date: March 23rd

Field Dates: March 06, 2026 to March 16, 2026

March 2026

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Study Overview



This report addresses the impact of the US-Israel conflict with Iran on Canada's oil and gas strategy:

- **Perception of Canada's global position**
- **Attention to conflict**
- **Impact of conflict on Canada's supplier role**
- **Export strategy**

Key Findings

- 1** **Canadians are engaged with the Iran conflict and that engagement drives stronger pro-export sentiment.**

Two-in-three (66%) are following the Iran conflict closely. Attention to the Iran conflict directly drives perceptions of urgency. Among those paying close attention, 37% say expanding Canada's oil and gas market position is an urgent priority, compared to just 20% saying urgent priority among those not paying attention.
- 2** **Canadians following the conflict believe it is reinforcing Canada's supplier credibility.**

62% expect the Iran conflict to make Canada a more attractive supplier of oil and gas. Among those following closely, 72% hold this view (29% much more + 43% somewhat more attractive), versus only 47% among those that are not paying attention to Iran news.
- 3** **Expanding Canada's export market position has broad, cross-partisan, cross-regional consensus.**

76% support expanding Canada's market position as a safe, secure supplier, including 31% who say it is an urgent priority and 45% who call for expansion but with caution. Support is consistently high across regions (BC 80%, AB 82%, ON 79%, PQ 68%) and party lines (Liberal 82%, Conservative 84%, NDP 77%). Urgency is driven mainly by Conservatives, others prefer a more measured approach.
- 4** **Market expansionists dominate the landscape and cut across party and region.**

We grouped Canadians based on their shared attitudes. 54% are Market expansionists, believing the Iran conflict enhances Canada's credibility and supporting active market expansion. This segment is the plurality in every region, including Quebec (48%), BC (58%) and Alberta (60%), and all parties. Only 8% are Conflicted, and 16% are Oil and Gas Opponents.
- 5** **Quebec is the outlier, but the majority is pro-expansion.**

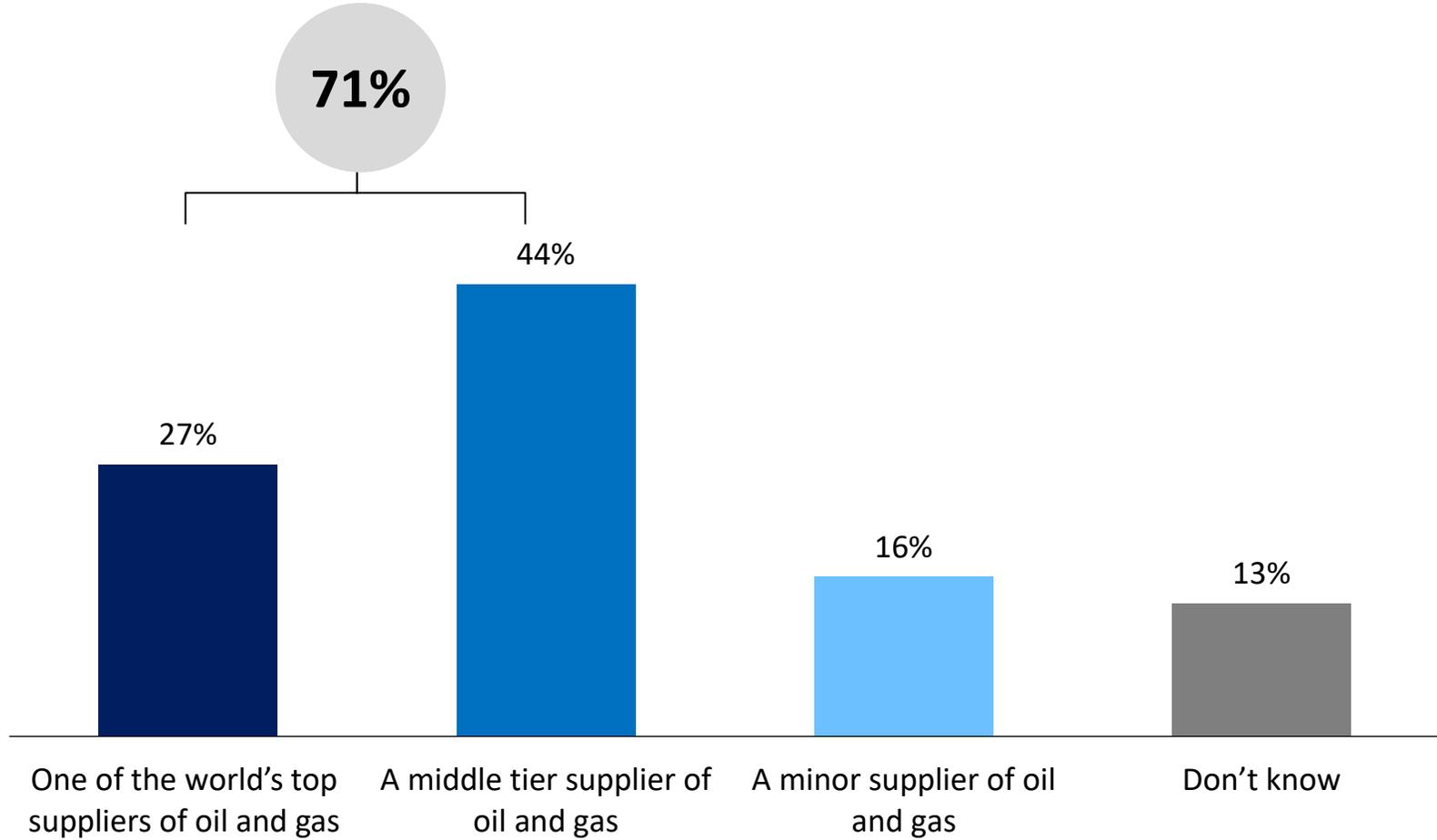
While Quebec is least likely to see Canada currently as a top global oil and gas producer (17% vs. AB at 46%) and has the highest share of Oil and Gas Opponents (22%), Market Expansionists still represent a 48% plurality there. Even Canada's most skeptical province is open to the increasing oil and gas exports.

Iran Conflict & Canadian Oil and Gas

Canada's Global Position in Oil and Gas Production: 71% see Canada as top or middle tier global supplier; AB (46%) vs QC (17%) as top supplier



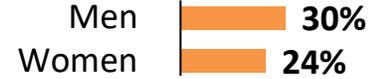
Thinking about oil and gas production around the world, from what you know, do you think Canada is a ...
[asked of all respondents; n=1,000]



Segmentation

Those who say 'Top supplier'

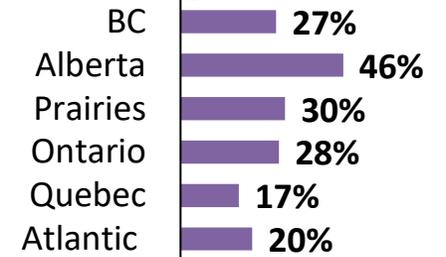
Gender



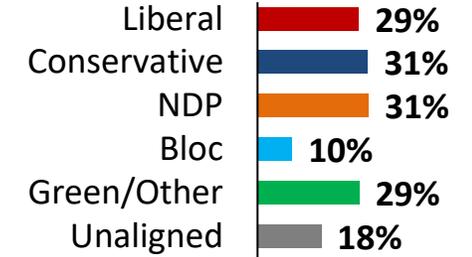
Age



Region

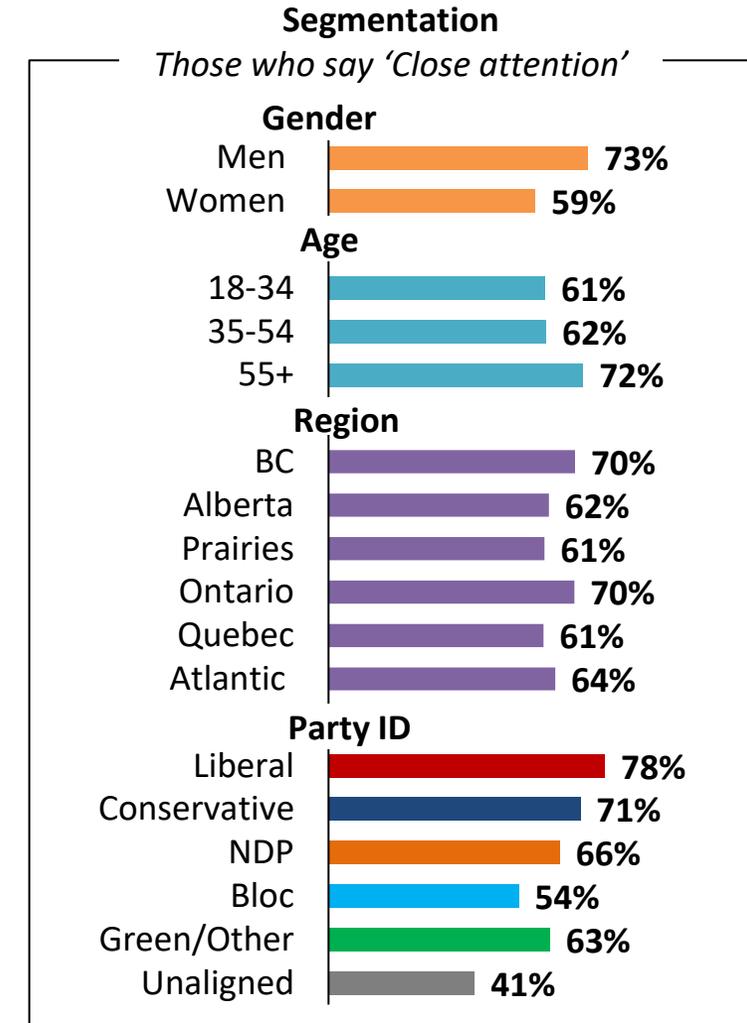
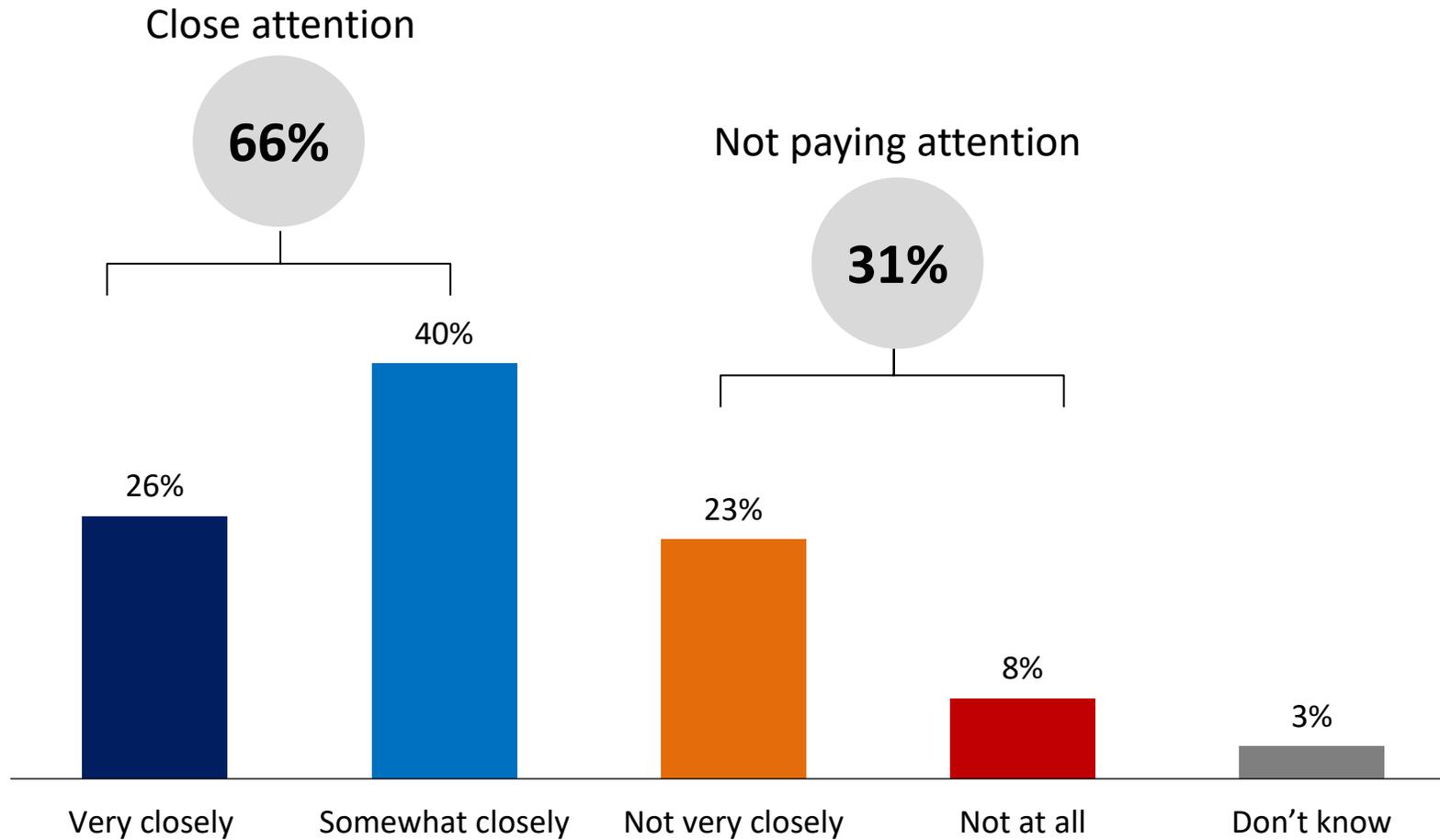


Party ID



Attention to Iran Conflict: two-in-three are following closely; least attention among Unaligned (41%), Bloc (54%) and women (59%)

Q How closely have you been following the news about the US and Israeli conflict with Iran?
[asked of all respondents; n=1,000]



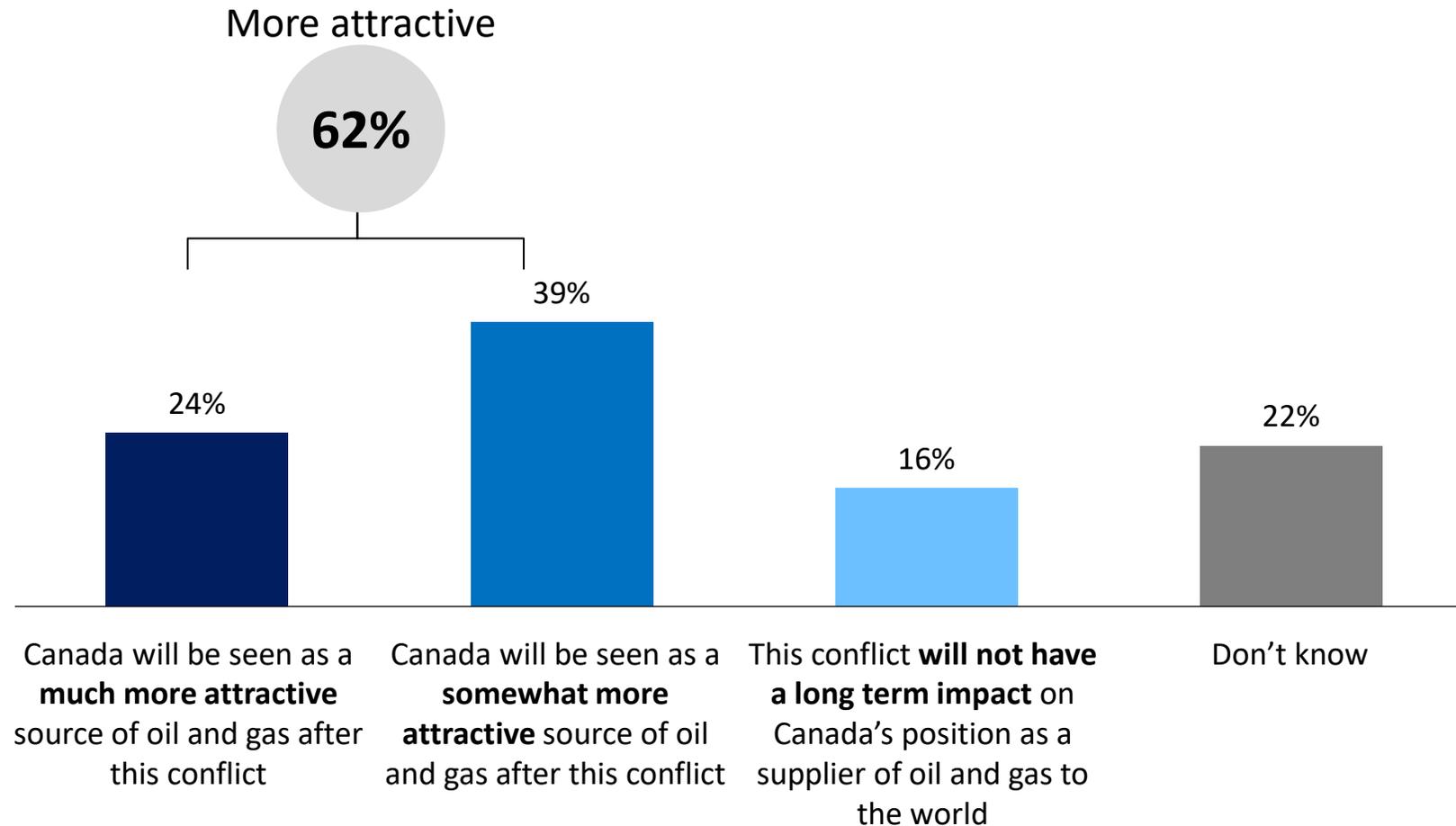
Canada's Supplier Role

Impact of Iran Conflict on Canada's Supplier Role: About 3-in-5 (62%) expect Canada to be more attractive source of oil and gas post conflict

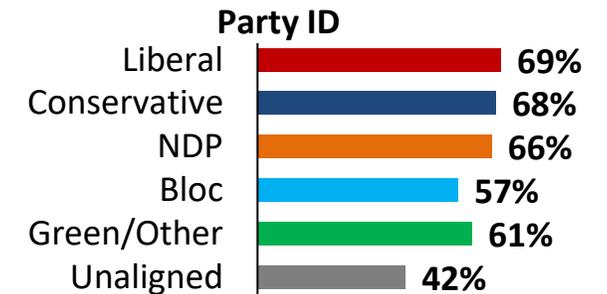
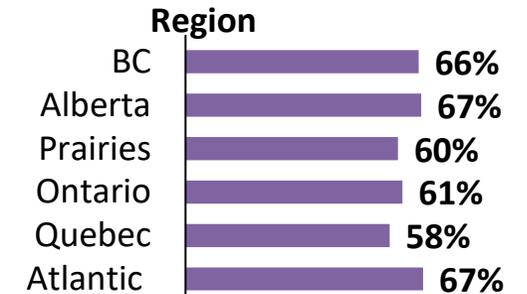


Do you think that US and Israeli conflict with Iran will have any long-term impact on Canada's position as a supplier of oil and gas to the world?

[asked of all respondents; n=1,000]



Segmentation Those who say 'More attractive source of oil and gas'

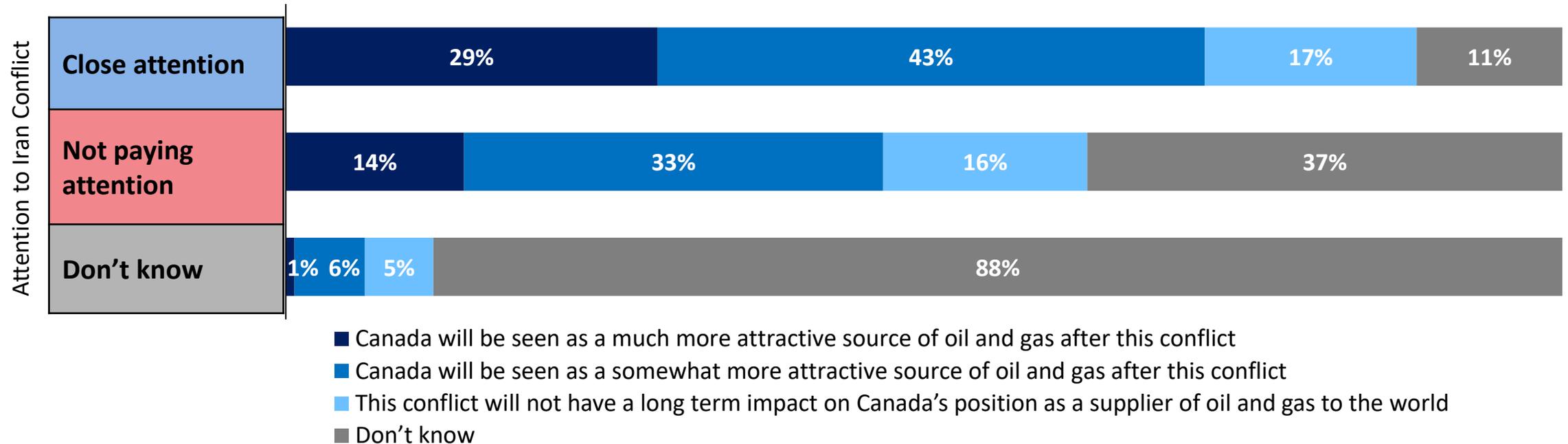


Impact of Conflict on Can's Oil and Gas Role: The share of those saying 'much more attractive' is highest among those who pay close attention



Do you think that US and Israeli conflict with Iran will have any long-term impact on Canada's position as a supplier of oil and gas to the world?... **BY** Attention to Iran Conflict

[asked of all respondents; n=1,000]



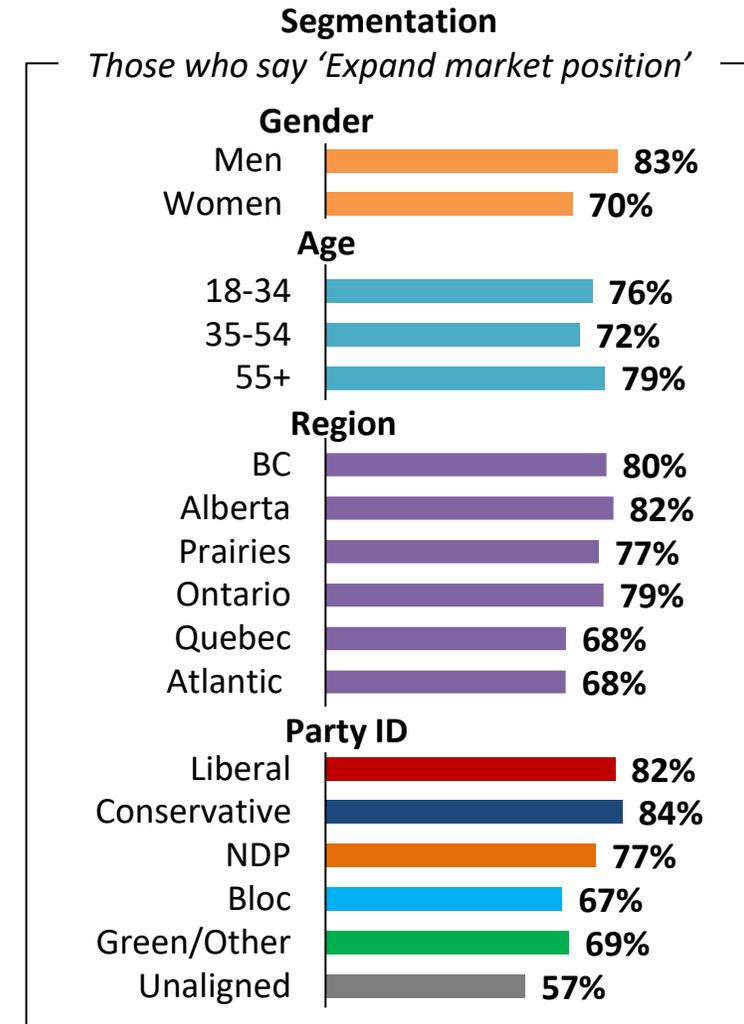
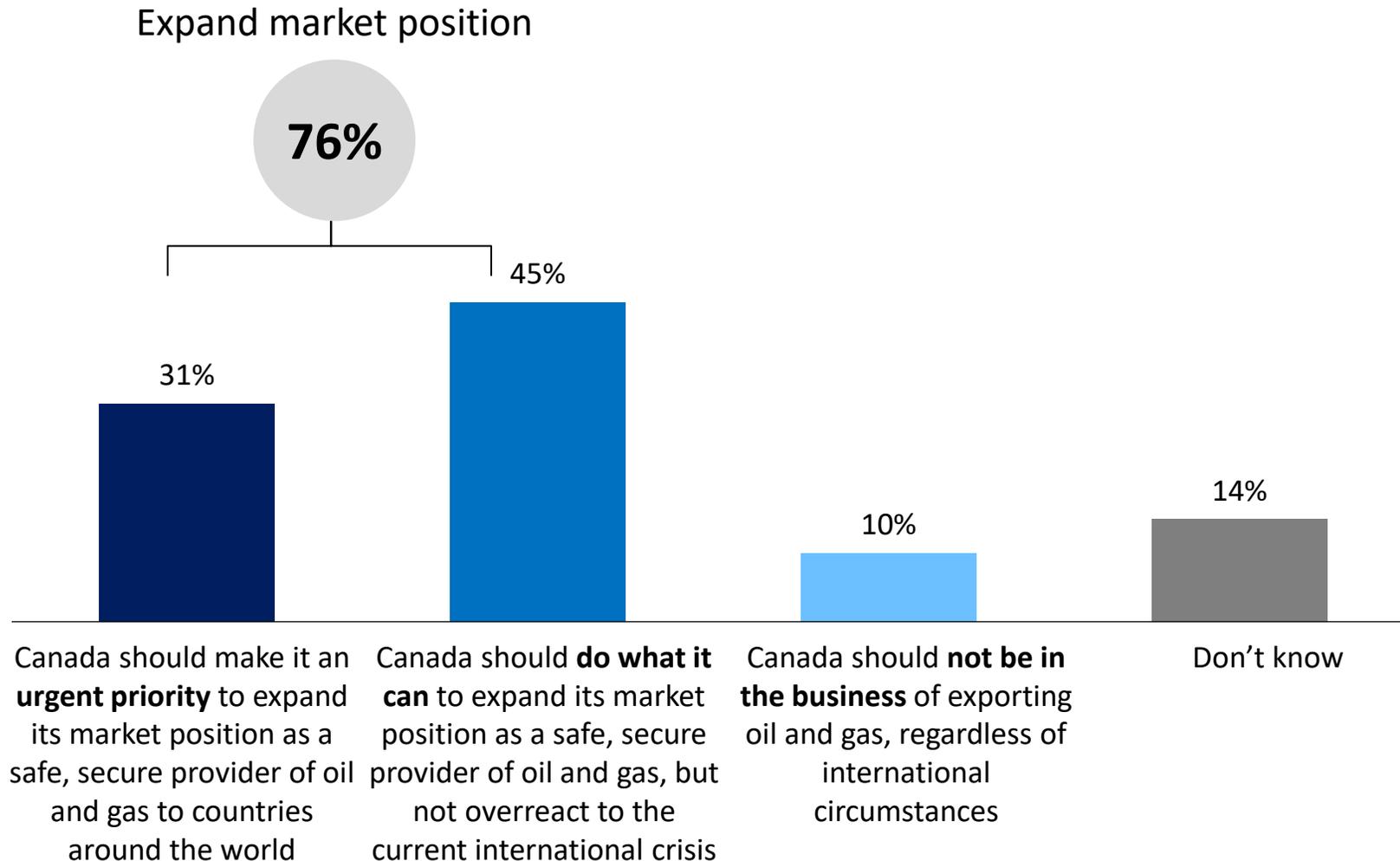
Expanding Markets

Market Expansion: 76% support expanding Can's market positioning, 31% urgently so; BC (80%) and AB (82%), the most supportive



Which of the following statements is closest to your views?

[asked of all respondents; n=1,000]



Market Expansion By Party ID: Urgency to expand is driven mainly by Conservatives; other parties prefer a more measured approach

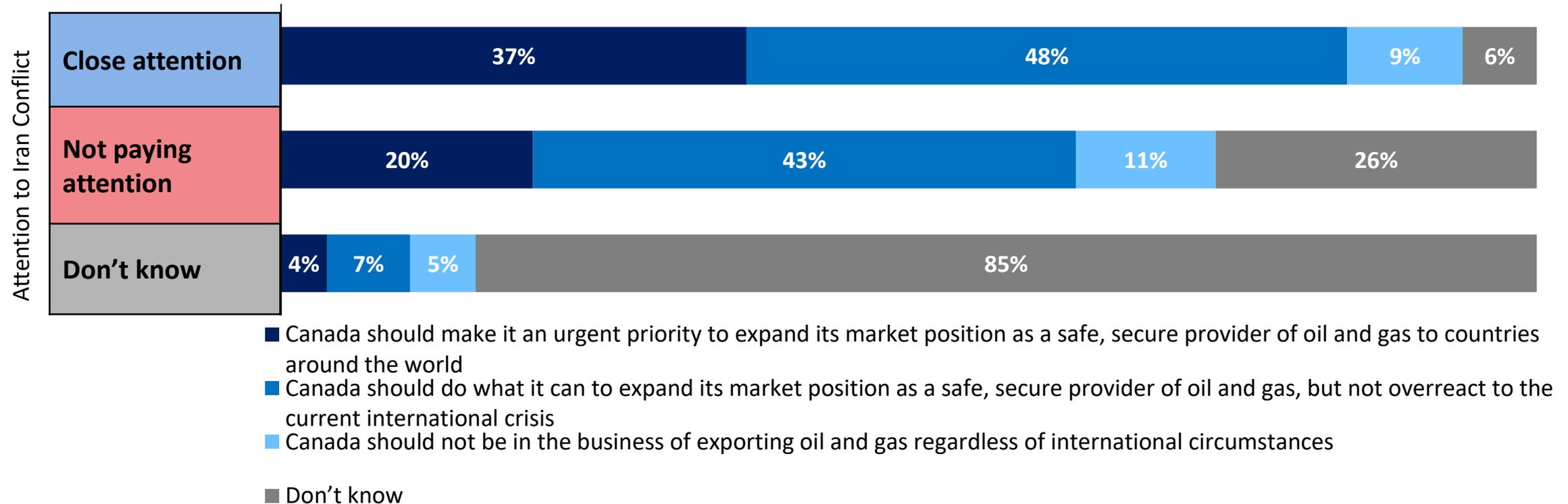
Which of the following statements is closest to your views? **BY Party ID**

[asked of all respondents; n=1,000]

	Party ID						
	Total	Liberal	Conservative	NDP	Bloc	Green/Other	Unaligned
	(n=1000)	(n=302)	(n=312)	(n=90)	(n=53)	(n=56)	(n=187)
Canada should make it an urgent priority to expand its market position as a safe, secure provider of oil and gas to countries around the world	31%	29%	45%	24%	24%	21%	18%
Canada should do what it can to expand its market position as a safe, secure provider of oil and gas, but not overreact	45%	53%	39%	53%	43%	48%	38%
Canada should not be in the business of exporting oil and gas regardless of international circumstances	10%	7%	7%	13%	16%	18%	11%
Don't know	14%	11%	9%	10%	17%	13%	32%

Canada's Oil and Gas Export Policy: The share of those saying 'urgent priority' is directly proportional to attention paid to the Iran conflict

Q Which of the following statements is closest to your views? **BY** Attention to Iran Conflict
[asked of all respondents; n=1,000]



Conflict Impact Segments: Market expansionists (54%) make the largest segment, while only 8% are Conflicted

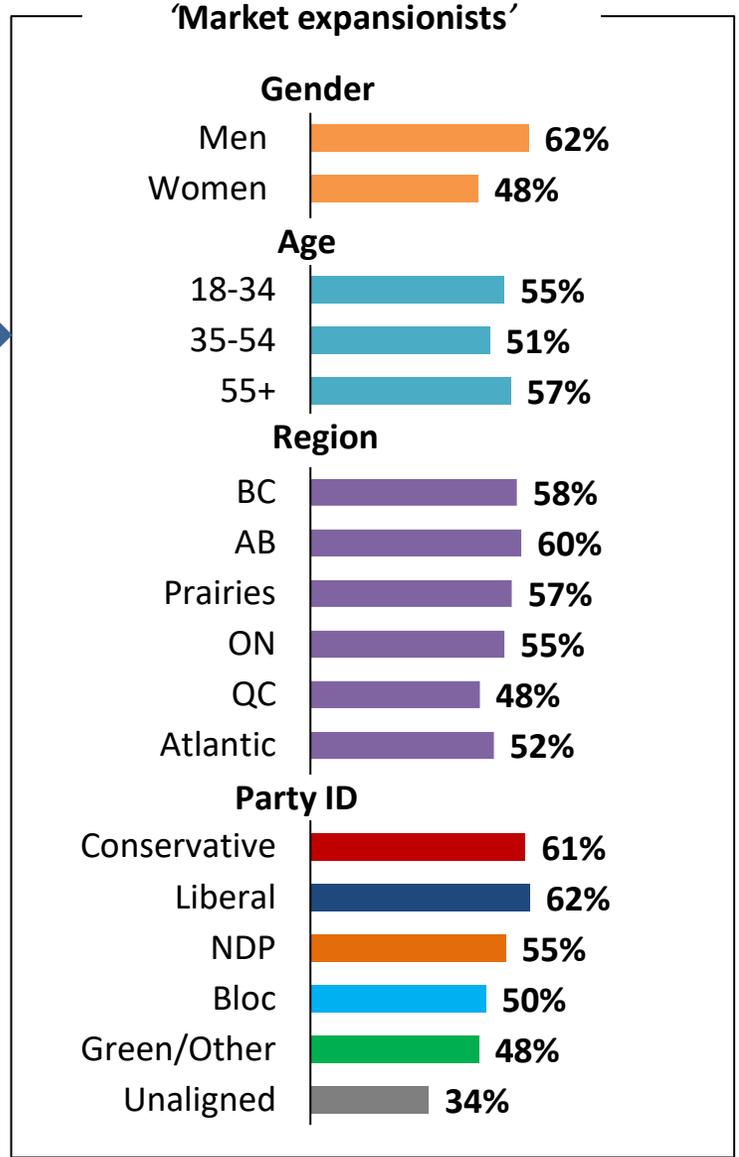
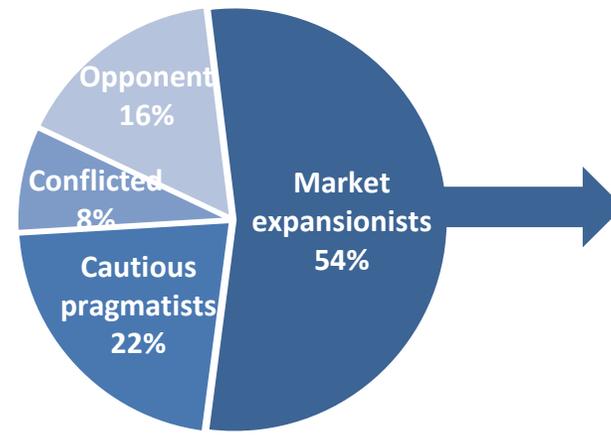
Segmentation

Market expansionists: They believe the Iran conflict enhances Canada’s credibility as a safe, secure, and responsible energy supplier, and they support making market expansion.

Cautious pragmatists: Support expanding Canada’s oil and gas markets in principle but remain uncertain about whether the Iran conflict will materially change Canada’s long-term global position.

Conflicted: Acknowledging Canada’s increased attractiveness as a supplier yet rejecting the idea that Canada should actively export oil and gas.

Oil and Gas Opponents: Do not see the Iran conflict as materially affecting Canada’s role in global energy markets and do not support expanding exports.



Long-term Impact of the Iran Conflict on Canada’s Role

Canada's Oil and Gas Export Policy		Canada will be seen as...	
		A more attractive source of oil and gas after this conflict	Will not have a long-term impact on Canada's position/ Don't know
Canada should...	...expand its market position	54% Market expansionist	22% Cautious pragmatists
	... not be in the business of exporting oil and gas/ Don't know	8% Conflicted	16% Oil and Gas Opponent

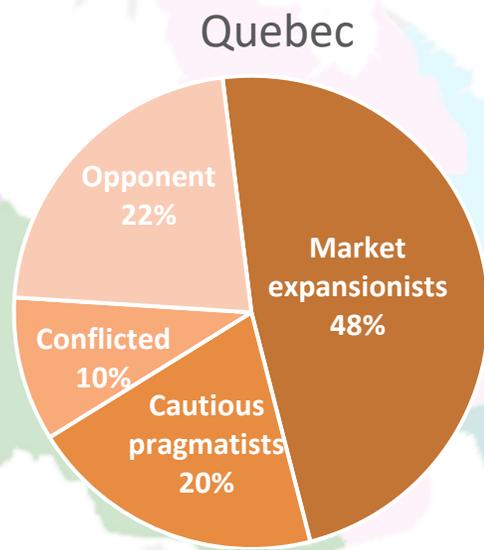
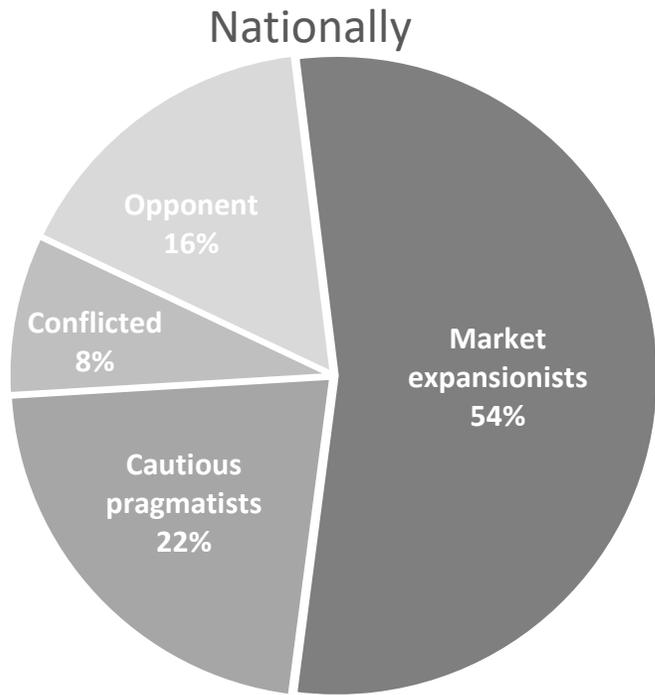
Strategic Segments: The majority of BC (58%) and AB (60%) believe the Iran conflict enhances Canada's credibility and support market expansion



Do you think that US and Israeli conflict with Iran will have any long-term impact on Canada's position as a supplier of oil and gas to the world?...

Which of the following statements is closest to your views?

[asked of all respondents; **Nationally** n=1,000, **BC** n=139, **AB** n= 111, **QC** n=230]



Methodology

Survey Methodology – National (W1-2)



These are the results of an online survey conducted between March 06, 2026 and March 16, 2026.

Method: This online survey was conducted using INNOVATIVE’s Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online samples. 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=2,059 Canadian citizens, 18 years or older. The results are nationally weighted to n=1,000 based on Census data from Statistics Canada.

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Weighting: Results for Canada are weighted by age, gender, region, education, and self-reported federal past 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 (%)
Men 18-34	190	9.2%	134	13.4%
Men 35-54	304	14.8%	158	15.8%
Men 55+	510	24.8%	195	19.6%
Women 18-34	193	9.4%	129	12.9%
Women 35-54	341	16.6%	165	16.5%
Women 55+	521	25.3%	216	21.7%
British Columbia	406	19.7%	139	13.9%
Alberta	372	18.0%	111	11.1%
Prairies	110	5.3%	67	6.7%
Ontario	643	31.2%	386	38.6%
Québec	413	20.0%	230	23.0%
Atlantic	120	5.8%	67	6.7%



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Building Understanding.

