

# Study on Canadians' Awareness, Knowledge and Attitudes Related to Clean Fuels



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## Table of Contents

<b>Methodology</b> .....	6
<b>Reporting Considerations</b> .....	7
TOP2 / BTM2 .....	7
Rounding .....	7
Multi-mentions .....	7
Significance Testing .....	7
Background .....	7
Research Rationale.....	8
Research Objectives .....	8
<b>Executive Summary</b> .....	9
Introduction .....	9
Research Purpose .....	9
Clean Fuels Knowledge and Awareness .....	9
Clean Fuels in Canadians’ Daily Life.....	10
Knowledge / Perceptions of Clean Fuels Usage .....	10
Climate / Energy Attitudes and Beliefs .....	11
Overall Approach .....	11
Questionnaire Design .....	11
Sample Design .....	11
Weighting.....	12
Generalization of Data .....	12
Research Outcomes.....	12
Total Contract Value.....	12
Political Neutrality Statement .....	13
<b>Detailed Findings</b> .....	14
Clean Fuels Knowledge and Awareness .....	14
Clean Fuels: Unaided First Thoughts.....	14
Awareness of Energy Sources.....	15
Awareness of Energy Sources – Top 3 .....	16
Self-Assessed Knowledge of Energy Sources .....	17
Identifying Clean Fuels.....	18
Identifying Clean Fuels – Top 3.....	19

Perceived Use of Clean Fuels in Canada .....	20
Assessing Perceptions of Clean Fuels: True or False Statements .....	21
Exposure to Clean Fuels in the Past 6 Months .....	22
Sources for Information on Clean Fuels – Top 3.....	23
Clean Fuels in Canadians’ Daily Life.....	24
Home Improvement Decision-Making.....	24
Primary Home Heating System .....	25
Primary Home Heating Systems – Top 2 .....	26
Affordability of Energy Bills in the Past Two Months .....	27
Affordability of Energy Bills for Different Home Heating Systems.....	28
Reasons for not Changing Home Heating System to a Clean Energy .....	29
Likelihood to Change to a Clean Fuel Home Heating System .....	30
Factors That Could Encourage Switching to a Clean Home Heating Source.....	31
Preferred Clean Fuel Option for Home Heating.....	32
Reason for Preferred Clean Fuel Option for Home Heating .....	33
Knowledge / Perceptions of Clean Fuels Usage .....	34
Agreement or Disagreement on Clean Fuels Economic, Environmental, and Safety Impacts..	34
Support or Opposition for Initiatives Promoting Clean Fuels .....	35
Trustworthiness of Sources on Clean Fuels Information .....	36
Trustworthiness of Natural Resources Canada on Clean Fuels Information .....	37
Climate / Energy Attitudes and Beliefs.....	38
The Future of Energy in Canada: Local Impacts of a Shift to Clean Fuels.....	38
Level of Worry About Climate Change .....	39
<b>Demographics .....</b>	<b>40</b>
Province or Territory .....	40
Age.....	40
Gender .....	41
First Nations, Métis, or Inuk (Inuit) .....	42
Race or Cultural Group .....	42
Education.....	43
Employment Status.....	43
Household Income .....	44
Dwelling Type .....	44

Home Ownership.....45  
Vehicle Ownership.....45  
Vehicle Type(s) .....46  
Public Transit Usage .....46  
Active Transportation .....47

## Methodology

<b>Method</b>	Online survey using computer-assisted web interviewing (CAWI)
<b>Criteria for Participation</b>	Residents of Canada who are 18 years of age or older
<b>Sample Size</b>	N=3020
<b>Fieldwork Dates</b>	February 5 – 23, 2025
<b>Average Survey Duration</b>	12.3 minutes
<b>Additional Notes</b>	<ul style="list-style-type: none"> <li>• A sampling strategy was followed during fieldwork to ensure province and territory quotas, and gender parity (50% men and 50% women) within each age group (18-34; 35-54; 55+) and region was achieved.</li> <li>• Results throughout this report have been statistically weighted by region using provided quotas, along with age and gender, to ensure that the sample reflects the target population according to 2021 Census data.</li> <li>• This survey was available in Canada’s two official languages, English and French. 83% completed it in English, and 17% in French.</li> <li>• The sample for data collection has been weighted to ensure it accurately reflects Canadians’ opinions. Because the surveys were conducted using online samples, the sample cannot be assumed to be truly random. However, sample from the Fuzion Panel is probability based as it’s built using Random-Digit Dialing (RDD), a purely random method that ensures sampling integrity.</li> <li>• Although traditional margin of error cannot be calculated for online samples, it is helpful to compare what the margin of error would be for a probability sample of the same size as a reference point. As such, a margin of error is <math>\pm 1.783\%</math>.</li> </ul>

## Reporting Considerations

### TOP2 / BTM2

Top 2 (TOP2) and Bottom 2 (BTM2) reference the collected TOP2 positive and BTM2 negative responses, respectively where applicable. For example, a TOP2 grouping referred to as “satisfied” may be the combined result of “very satisfied” and “somewhat satisfied,” where a grouping of “not satisfied” (BTM2) may be the combined result of “very dissatisfied” and “somewhat dissatisfied”.

### Rounding

Due to rounding, numbers presented throughout this document may not add up to the totals provided. For example, in some cases, the sum of all question values may add up to 101% instead of 100%. Similar logic applies to TOP2 and BTM2 groupings.

### Multi-mentions

In some cases, more than one answer option is applicable to a respondent. Multiple mention questions allow respondents to select more than one answer category for a question. For questions that ask for multiple mentions (e.g., Where have you seen, read, or heard about clean fuels in the past 6 months? Please select all that apply.) it is important to note that the percentages typically add to over 100%. This is because the total number of answer categories selected for a question can be greater than the number of respondents who answered the question. For example, respondents were able to select “telephone” and “email” as their answer.

### Significance Testing

Throughout the report, statistically significant differences (at the 95% confidence level) between demographic segments have been stated under the related finding in the right text boxes. It is important to point out that, not all statistical differences that exist between the segments are mentioned in the notes, but they can all be found in the tabulated data.

For significant differences shown in tables, letters above the row (A, B, C) denotes the percentage which is significantly higher than the segment with the corresponding letter. Each segment is denoted with letters (e.g., A, B, C). If the letter “A” appears above the response of a certain segment, this indicated that the response of that segment is significantly higher than the response of the segment denoted with the letter “A”.

### Background

Clean fuels - or low carbon intensity fuels – have significantly lower emissions over their lifecycle than conventional fuels. Examples of clean fuels include ethanol, biodiesel, advanced biofuels such as renewable diesel, liquid synthetic fuels, renewable natural gas, and low carbon intensity hydrogen. Clean fuels can be produced from a variety of feedstocks, such as sustainably harvested agricultural and forest biomass, wastes (including agricultural, forestry, and municipal solid wastes), renewable electricity, and/or from fossil fuel sources with CCUS.

Clean fuels can enable Canada to achieve net-zero emissions by 2050 across multiple hard-to-abate sectors including shipping, aviation, heavy-duty trucking, and industrial processes. Canada

is positioning itself as a global leader for the energy transition through clean fuels, to benefit regional economic development, create new employment opportunities and meet global demand.

To support the transition, Canada has published Clean Fuel Regulations to help drive the development and adoption of clean fuels. As well, Canada has created the \$1.5 billion Clean Fuels Fund that will advance the development or retrofit of clean fuel production facilities, further advancing Canada's ability to reduce emissions in several sectors. Hydrogen, for instance, can provide between 18% and 24% of global energy demand by 2050, and Canada's Hydrogen Strategy has set an action plan for this emerging economy.

Natural Resources Canada's is committed to raising awareness and increasing public confidence in clean fuels as this sector of the economy expands. The proposed survey research aims to establish a baseline data set that will increase government and stakeholder understanding of the general public's knowledge of clean fuels, helping to inform future program design and policy work.

## **Research Rationale**

The findings can assist Government in developing policies and designing and refining programs that support the adoption of clean fuels by consumers and industry. A greater understanding of the public's opinions on clean fuels can enable targeted education and awareness campaigns that can improve public acceptance.

This research will provide updated data on consumer awareness, knowledge and acceptance of clean fuels, and the measurement and tracking of results year-over-year will provide evidence of trends and the pace of growth in Canadians' knowledge and confidence in clean fuels.

## **Research Objectives**

An objective of the Clean Fuels Awareness Survey project is to better understand public perceptions, awareness, and knowledge of clean fuels. In addition, the research will inform development of key performance indicators for ongoing Government of Canada policy and program design, including providing evidence that can support regulatory development and implementation, and potential future program investments. Lastly, the survey results will help inform government and stakeholders on public opinion of and commitment to net-zero pathways by way of acceptance of clean fuels, which is important as these fuels become more readily available for Canadians.

# Executive Summary

## Introduction

Forum Research was commissioned to conduct a survey of Canadians covering topics important to Natural Resources Canada and the Government of Canada. The survey topics included:

- Clean Fuels Knowledge and Awareness
- Clean Fuels in Canadians' Daily Life
- Knowledge/ Perceptions of Clean Fuels Usage
- Climate/Energy Attitudes and Beliefs

Insights garnered from the quantitative study will enable the Government of Canada to further develop and refine policies, program implementation, and communication strategies.

This report addresses the methodological details of the study pertaining to the time period between February 5<sup>th</sup>, 2025 and February 23<sup>rd</sup>, 2025. This is the final report.

## Research Purpose

The purpose of this project is to dive deep into the intricate layers of Canadians' awareness, comprehension, and viewpoints regarding clean fuels. Commissioned by Natural Resources Canada (NRCan), this nationwide survey isn't just a routine data-gathering exercise—it's a pivotal mission aimed at understanding public sentiment as Canada pushes toward its ambitious and essential target: net-zero emissions by 2050. The insights gleaned will serve as a critical foundation for crafting future policies, refining ongoing programs, and influencing decisions at both the governmental and societal levels.

## Clean Fuels Knowledge and Awareness

*Respondents have a mixed understanding of clean fuels, with varying levels of recognition and knowledge across different energy sources.*

- Unaided first thoughts of “clean fuels” include solar energy (17%), and wind energy (15%). **(Q5)**
- Most respondents are aware of natural gas (93%), fossil fuels (84%), and nuclear power (84%). Nuclear power is the most recognized clean energy source at 84%. **(Q6)**
- About seven-tenths (TOP2: 71%) of respondents who have heard of fossil fuels are knowledgeable about them. On the contrary, self-assessed knowledge of clean energy resources is much lower, with less than half of respondents (TOP2: 45%-48%) claiming to be knowledgeable of renewable natural gas, ethanol, biofuel, and hydrogen. **(Q7)**
- Hydrogen was the most recognized clean fuel (52%), followed by renewable natural gas (43%) and biofuel (40%). However, 36% incorrectly identified natural gas as clean, and 11% were unsure. **(Q8)**

- The most common uses of clean fuels recognized by respondents are home heating (55%), personal vehicles (52%), and other transportation (51%). Fewer respondents associate them with agriculture (43%) and manufacturing (36%). **(Q9)**
- When asked true or false questions about clean fuels, respondents answered 4 out of 7 statements correctly, but there are knowledge gaps about biodiesel (16% incorrect), sustainable aviation fuel (14% incorrect), and renewable natural gas (22% incorrect). **(Q10)**
- One third of respondents (33%) have seen, read, or heard about clean fuels in the past 6 months, and of those who have, the top sources of this information was social media platforms (46%), Canadian TV/radio/newspaper (45%), and via internet search (e.g. Google) (45%). **(Q11 and Q12)**

## Clean Fuels in Canadians' Daily Life

*Most respondents that can make home improvement decisions rely on natural gas or electricity for heating and prioritize financial savings over environmental concerns when considering clean energy options.*

- About three-fourths of respondents (74%) can make home improvement decisions independently, with household members, or with third-party approval. **(Q14)**

### Of those who make home improvement decisions...

- The two most popular primary home heating sources are natural gas (46%) and electricity (43%), while all other sources account for only 11%. **(Q15)**
- The vast majority (96%) have been able to afford their energy bills in the past two months, with nearly three-fifths (59%) affording them easily and nearly two-fifths (37%) with difficulty. **(Q16)**
- The majority (BTM2: 75%) are unlikely to switch to a clean home heating system within the next year, with top barriers being cost (42%), availability concerns (38%), and a lack of perceived need (33%). **(Q17, Q18)**
- About four-fifths (TOP2: 81%) would switch to clean fuel if it saved them money, and nearly as many (TOP2: 79%) would switch for better energy- and cost-efficiency, indicating financial incentives are a stronger motivator than environmental concerns. **(Q19)**
- If given the option to switch from unclean to clean fuel for home heating, about three-fifths (63%) would choose renewable natural gas, while about one-fifth (22%) would choose hydrogen. **(Q20)**
- Those favoring renewable natural gas cite its seamless transition (32%), hydrogen supporters highlight its environmental benefits (36%), and biofuel supporters value its availability and ease of access (18%). **(Q21)**

## Knowledge / Perceptions of Clean Fuels Usage

*Strong support for clean fuels is driven by confidence in their safety and environmental benefits, alongside strong trust in information resources.*

- Nearly four-fifths of respondents (TOP2: 78%) agree that increasing the use of clean fuels will reduce greenhouse gas emissions and that clean fuels are safe for home heating. **(Q22)**
  - This aligns with broader support for clean fuel initiatives, as four-fifths of respondents (TOP2: 80%) back the development of codes and standards for the safe use of clean fuels. Additionally, nearly four-fifths (TOP2) support investing in skills training for clean fuel sector jobs and using clean fuels in government buildings and vehicle fleets. **(Q23)**
- When it comes to trust in information about clean fuels, the vast majority of respondents (TOP2: 91%) trust scientists as a reliable source, followed closely by Natural Resources Canada at 85% (TOP2). **(Q24)**

## Climate / Energy Attitudes and Beliefs

*Most respondents believe transitioning to clean energy will bring environmental and economic benefits, and many express concern about climate change.*

- About three-fourths of respondents believe increasing clean fuel production and reducing fossil fuel use will improve air and water quality (TOP2: 77%). Respondents think these actions will also make job opportunities in the energy sector better (TOP2: 73%) and make quality of life better (TOP2: 70%). **(Q25)**
- Nearly three-fourths of respondents (TOP3: 73%) are worried about climate change, with similar levels of extreme (23%), very (24%), and moderate (26%) concern. **(Q26)**

## Overall Approach

Natural Resources Canada provided specific requirements for conducting the survey in its request for proposal.

The surveys were conducted using the computer-assisted web interview (CAWI, online survey) methodology and was administered in both official languages to the Canadian population.

## Questionnaire Design

Natural Resources Canada provided Forum Research with a draft version of the questionnaire. Forum Research worked with the Natural Resources Canada project team to review the questionnaire, with specific attention to question wording, ordering, and the overall flow of the survey. The survey was pre-tested before data collection upon request from Natural Resources Canada. The pre-tests aimed to achieve 20 completes, with 10 administered in French and 10 administered in English. The pre-test data was shared with Natural Resources Canada. A thorough review of the survey flow, logic, and questionnaire design was conducted by both Forum Research and Natural Resources Canada.

## Sample Design

The sample was sourced using an online panel methodology, which includes a combination of Fuzion Panel, and partner panels to achieve the required sample size of n=3,000 unique respondents.

The sample targets adults living in Canada 18 years of age and older, aiming for appropriate representation of gender, age, and regional split from 2021 Statistics Canada Census

## Weighting

Forum Research, in collaboration with the Natural Resources Canada, applied a weighting strategy (using 2021 Statistics Canada Census data) which is balanced according to:

- Age
- Gender
- Region

## Generalization of Data

The sample for data collection has been weighted to ensure it accurately reflects Canadians' opinions. Because the surveys were conducted using online samples, the sample cannot be assumed to be truly random. However, sample from the Fuzion Panel is probability based as it's built using Random-Digit Dialing (RDD), a purely random method that ensures sampling integrity.

Although traditional margin of error cannot be calculated for online samples, it is helpful to compare what the margin of error would be for a probability sample of the same size as a reference point. As such, a margin of error is  $\pm 1.783\%$ .

## Research Outcomes

This survey will provide concrete, actionable baseline data on Canadians' perceptions of clean fuels. Beyond that, we'll gain deep, regional insights—a granular look at how different provinces and territories view the clean fuel revolution. And, crucially, the data will give the government a set of Key Performance Indicators (KPIs) to gauge the success of future programs and investments. This isn't just a one-off project, either. It sets the stage for ongoing annual tracking, ensuring NRCan can monitor and respond to evolving trends, quickly and strategically.

## Total Contract Value

The total contract value is equal to \$48,460.00

## Political Neutrality Statement

I hereby certify as Senior Officer of Forum Research Inc. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity and the Directive on the Management of Communications - Appendix C (Appendix C: Mandatory Procedures for Public Opinion Research).

Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

Signature:

A handwritten signature in black ink, reading "Lorne Bozinoff". The signature is written in a cursive style with a prominent loop at the end of the last name.

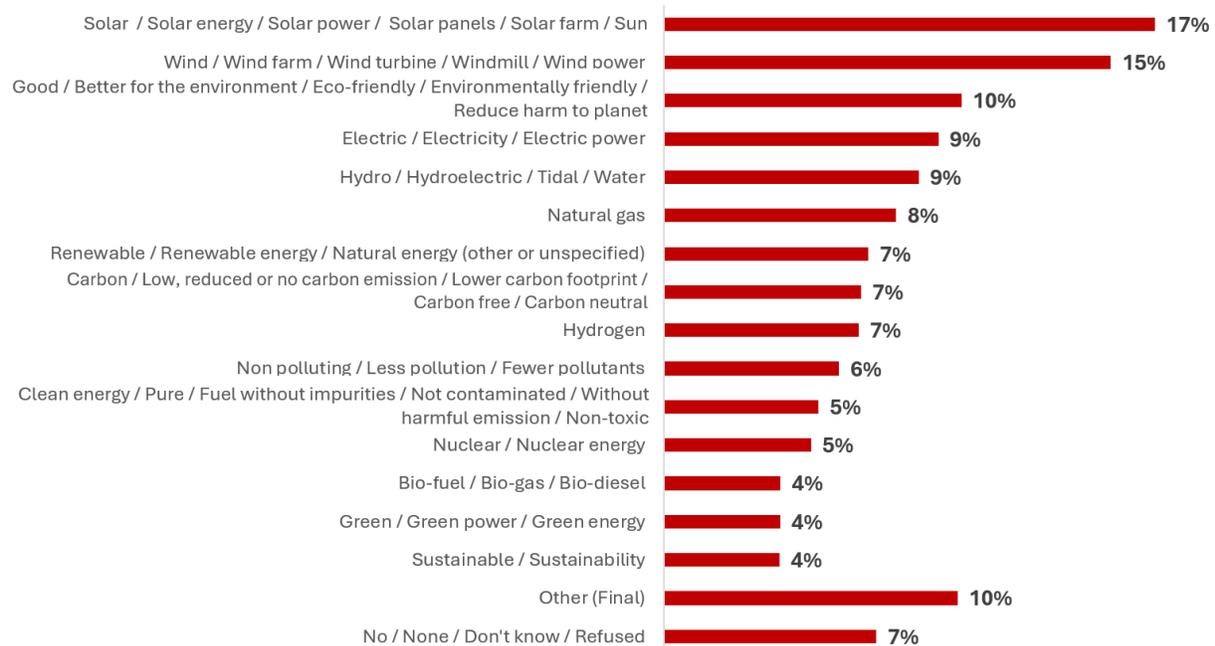
Dr. Lorne Bozinoff | President & CEO | Forum Research Inc.

## Detailed Findings

### Clean Fuels Knowledge and Awareness

#### Clean Fuels: Unaided First Thoughts

When respondents hear the term “clean fuels” in reference to energy sources, forms of **solar energy** (17%) is top of mind, followed by **wind energy** (15%).



**Note:** Responses with <4% rounded are not shown above.

**Question 5.** What words or phrases come to mind when you hear the term, “clean fuels” in reference to energy sources?

**Sample Size:** n=3020

**Base:** All Respondents

The following groups are significantly more likely to **mention forms of solar energy** (17%) when they hear the term ‘clean fuels’:

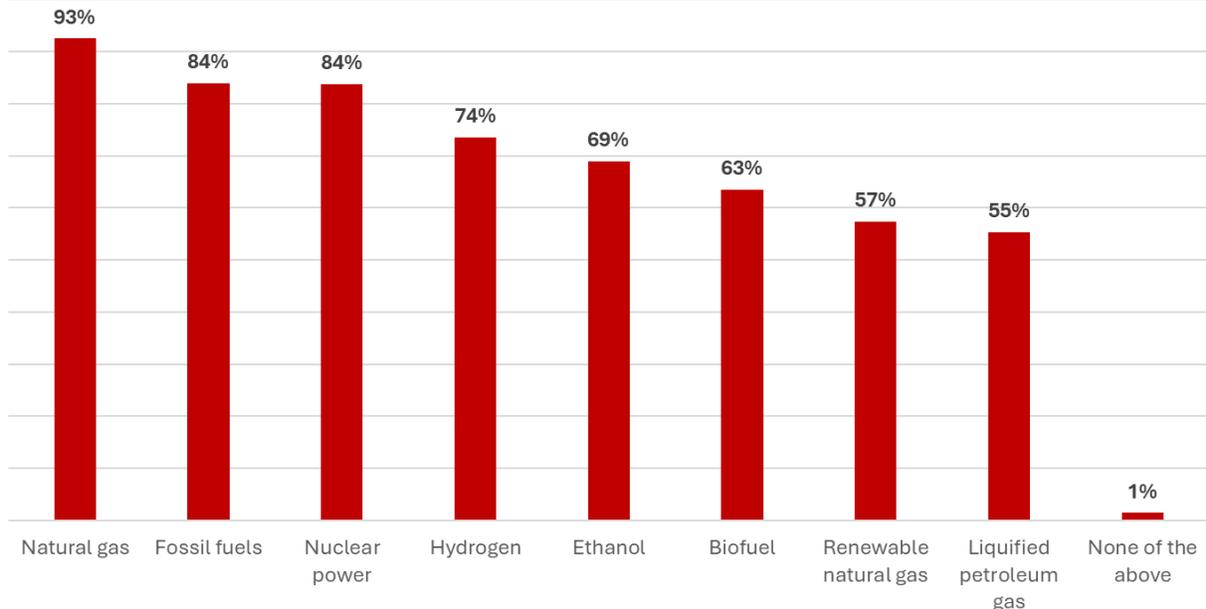
- Respondents ages 18 to 24 (21%) compared to respondents ages 25 to 34 (14%) and 45 to 54 (12%).
- Older respondents (65+; 22%) compared to younger respondents (25 to 64; 12%-16%).
- Respondents in all other regions of Canada (16%-21%) compared to respondents in Quebec (8%).
- Respondents living in a single, detached home (18%) compared to respondents living in a town/row home (13%) or apartment/condo (14%).
- Non minorities (18%) compared to visible minorities (14%).

- Respondents with more education (bachelor's degree or above;18%-21%) compared to respondents with less education (less than high school, high school, or apprenticeship/trades;10%-13%).
- Respondents employed part-time, self-employed or retired (20%-21%) compared to respondents working full-time (14%).
- Respondents that make \$60K to under \$80K (19%) and \$100K to under \$150K (20%) compared to \$20K to under \$40K (13%).
- Respondents that make \$80K to under \$100K (15%) compared to \$100K to under \$150K (20%).

## Awareness of Energy Sources

The energy source respondents are most aware of is **natural gas** (93%), followed by **fossil fuels** (84%) and **nuclear power** (84%).

Among clean energy sources, nuclear power is the most recognized, with 84% of respondents selecting it.



**Question 6.** Which of the following energy sources have you heard of? Please select all that apply. [Multi-select]

**Sample Size:** n=3020

**Base:** All respondents

The following groups are significantly more likely to **have heard of natural gas**:

- Respondents ages 45 to 65+ (93%-96%) compared to ages 18 to 24 (88%).
- Respondents in all other regions of Canada (94%-96%) compared to respondents in Quebec (86%).
- Respondents living in a single, detached home (94%) compared to respondents living in a semi-detached home (89%).

- Respondents that are not indigenous (93%) or a non-minority (94%) compared to indigenous people (86%) and visible minorities (90%).
- Respondents with a post-graduate degree (93%) compared to those with less than a high school education (84%).
- Retired respondents (95%) compared to those working full/part time, or looking for work (89%-92%).

### Awareness of Energy Sources – Top 3

**Older** respondents and respondents with a **bachelor’s degree and above** are more aware of the three most widely recognized energy sources: **natural gas, fossil fuels, and nuclear power**. This trend suggests that younger or less educated individuals may have lower exposure to information about these energy sources.

	Age						Education						
	18-24	25-34	35-44	45-54	55-64	65+	Less than High School	High School	Apprenticeship/ Trades	College Degree	University certificate	Bachelors Degree	Above Bachelors Degree
	A	B	C	D	E	F	G	H	I	J	K	L	M
n=	230	515	512	487	544	732	69	420	218	700	204	817	553
Natural Gas	88%	90%	90%	93%	94%	96%	84%	91%	94%	93%	93%	93%	93%
				A	ABC	ABCD							G
Fossil Fuel	86%	83%	81%	79%	83%	90%	60%	76%	81%	84%	85%	87%	90%
	D					BCDE		G	G	GH	GH	GH	GHIJ
Nuclear Power	77%	78%	80%	82%	86%	92%	67%	79%	82%	83%	83%	85%	89%
					ABC	ABCDE		G	G	G	G	GH	GHIJL

For significant differences shown in tables, letters above the row (**A, B, C**) denotes the percentage which is **significantly higher** than the segment with the corresponding letter. Each segment is denoted with letters (e.g., A, B, C). If the letter “A” appears below the response of a certain segment, this indicated that the response of that segment is significantly higher than the response of the segment denoted with the letter “A”.

**Question 6.** Which of the following energy sources have you heard of? Please select all that apply. [Multi-select]

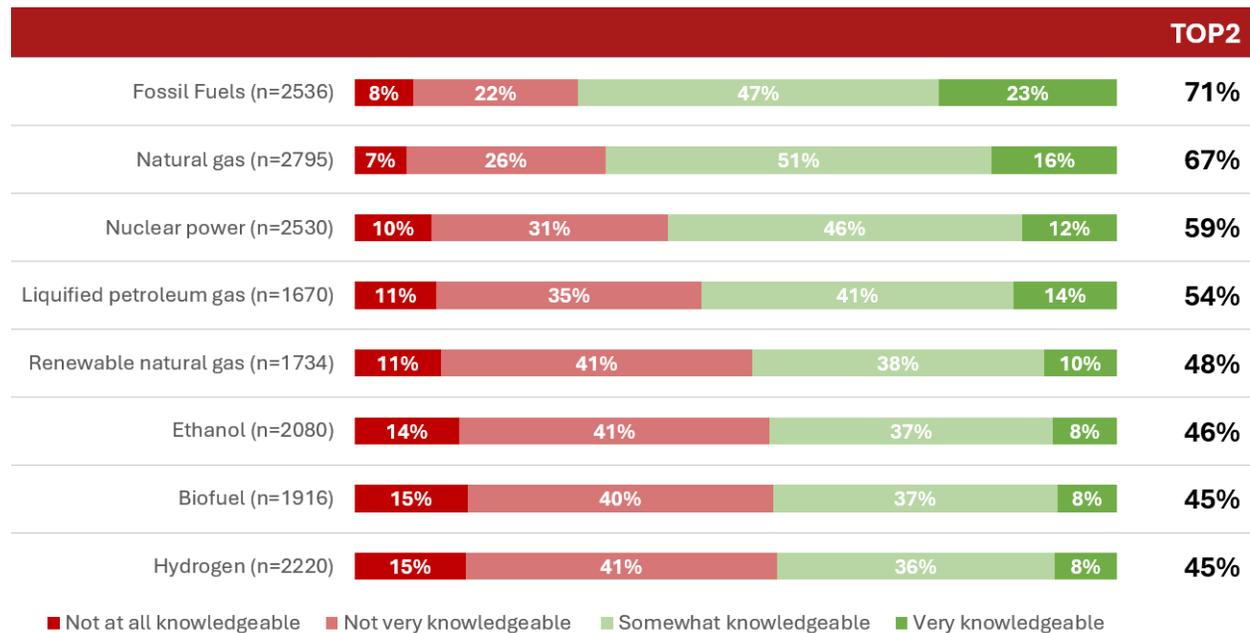
**Sample Size:** n=3020

**Base:** All respondents

## Self-Assessed Knowledge of Energy Sources

About seven-tenths (TOP2: 71%) of respondents that have heard of **fossil fuels** consider themselves to be knowledgeable of this energy source.

**Self-assessed knowledge is much lower for clean energy resources** with less than half of respondents (TOP2: 45%-48%) being knowledgeable of renewable natural gas, ethanol, biofuel, and hydrogen.



**Question 7.** You indicated that you have heard of these energy sources before. How knowledgeable are you about each of them?

**Sample Size:** Shown in the chart above

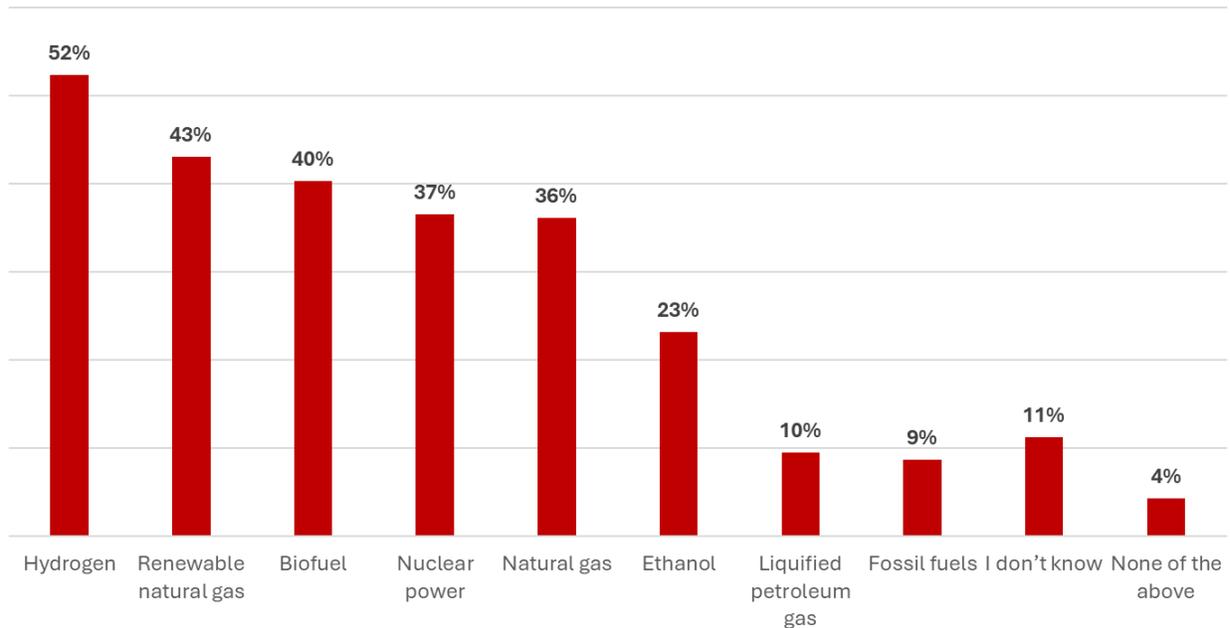
**Base:** Respondents that are aware of one or more of the energy sources from question 6.

The following groups are significantly more likely to be knowledgeable (TOP2) of **fossil fuels**:

- Older respondents (ages 65+; 75%), compared to younger respondents (ages 35 to 54; 67%-68%).
- Male (82%) compared to female (59%) respondents.
- Respondents in all other regions of Canada (70%-75%) compared to respondents in Quebec (60%).
- Respondents living in a single, detached home (72%) compared to respondents living in a town/row home (64%).
- Generally, respondents with more education (apprenticeship/trades, Bachelors, higher than bachelors; 70%-81%) compared to respondents with less education (Less than high school, high school; 50%-60%).
- Respondents employed full time, self-employed, and retired (72%-75%) compared to respondents unemployed, looking for work (60%).
- Generally, respondents that have a higher income (\$80K to \$250K and above; 74%-81%) compared to respondents that make under \$20K (64%) and \$40K to under \$60K (63%).

## Identifying Clean Fuels

**Hydrogen** was the most recognized clean fuel (52%), followed by **renewable natural gas** (43%) and **biofuel** (40%). However, 36% incorrectly identified **natural gas** as clean, and 11% were unsure.



**Question 8.** To the best of your knowledge, which of the following are considered clean fuels? Please select all that apply. [Multi-select]

**Sample Size:** n=3020

**Base:** All respondents

The following groups are significantly more likely to consider **hydrogen** a clean fuel:

- Male (66%) compared to female (39%) respondents.
- Non-indigenous (54%) and non-minorities (55%) compared to indigenous (43%) and visible minority (48%) respondents.
- Homeowners and those in single, detached homes (58% and 56%, respectively) compared to renters and those in town/row homes and apartments/condos (46% and 46%-49%, respectively).

### Identifying Clean Fuels – Top 3

**Older** respondents are more likely to consider **hydrogen** a clean fuel, whereas **younger** respondents are more likely to consider **renewable natural gas** and **biofuel** to be clean fuels. Respondents in **Ontario** are more likely to consider **biofuel** a clean fuel compared to respondents in **Atlantic Canada, Quebec, Alberta, Northwest Territories, British Columbia,** and the **Yukon**.

	Age						Region					
	18-24	25-34	35-44	45-54	55-64	65+	Atlantic Canada	QC	ON	MB/SK/NU	AB/NT	BC/YU
	A	B	C	D	E	F	G	H	I	J	K	L
n=	230	515	512	487	544	732	287	604	936	352	408	433
Hydrogen	48%	42%	48%	54%	55%	61%	48%	50%	51%	56%	56%	55%
			B	BC	BC	ABCDE					G	
Renewable Natural Gas	53%	53%	49%	45%	38%	32%	42%	44%	46%	38%	37%	46%
	DEF	DEF	EF	EF	F			JK	JK			JK
Biofuel	44%	45%	44%	43%	40%	33%	36%	36%	45%	42%	39%	39%
	F	F	F	F	F				GHKL			

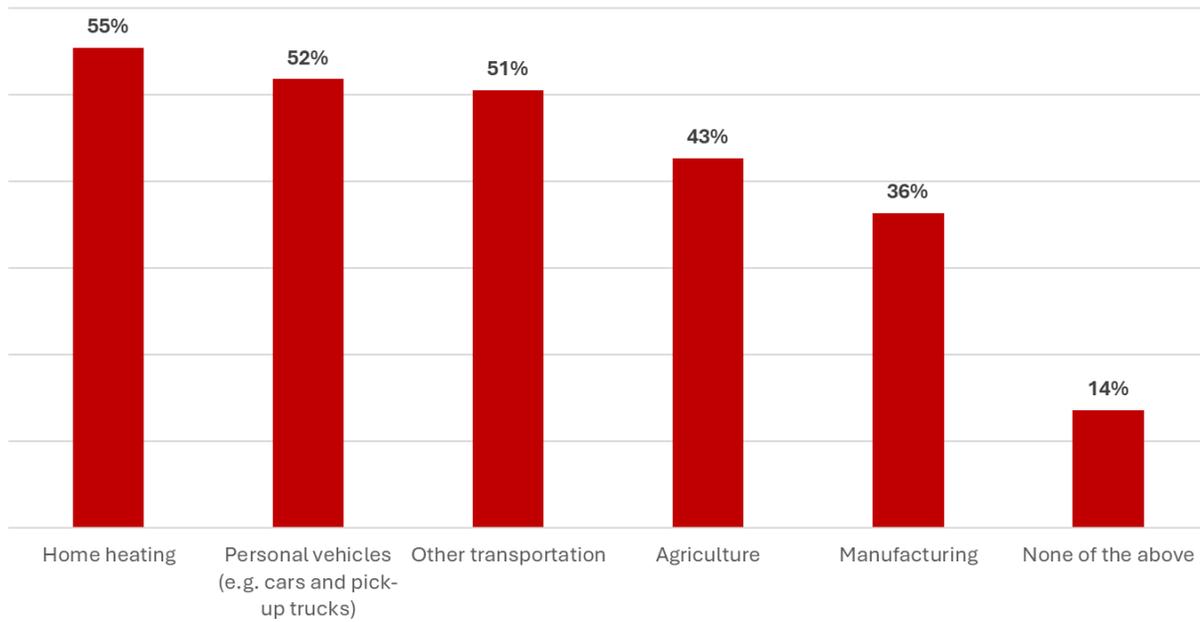
**Question 8.** To the best of your knowledge, which of the following are considered clean fuels? Please select all that apply. [Multi-select]

**Sample Size:** n=3020

**Base:** All respondents

## Perceived Use of Clean Fuels in Canada

The recognition of clean fuel uses is fairly balanced, with **home heating** (55%) being the most common, followed by **personal vehicles** (52%) and **other transportation** (51%). Fewer respondents associated clean fuels with **agriculture** (43%) and **manufacturing** (36%).



**Question 9.** To the best of your knowledge, where are clean fuels currently being used in Canada? Please select all that apply. [Multi-select]

**Sample Size:** n=3020

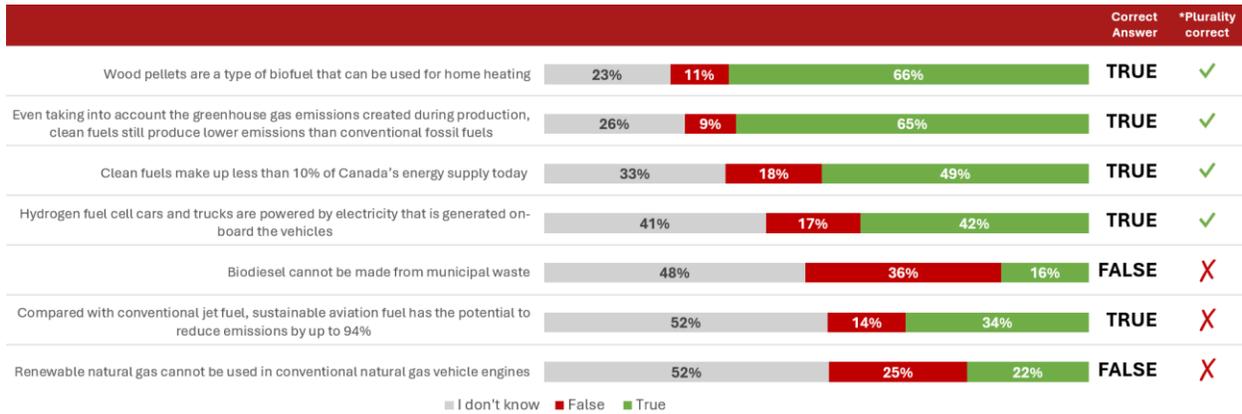
**Base:** All respondents

The following groups are significantly more likely to say clean fuels are currently being used for **home heating**:

- Respondents in the British Columbia and Yukon region (61%) compared to the Ontario (54%) and the Manitoba, Saskatchewan. And Nunavut region (53%).
- Respondents living in a single, detached home (57%) compared to residents living in a semi-detached home (48%).
- Non-minorities (57%) compared to visible minorities (51%).
- Self-employed respondents (59%) compared to part-time working respondents (50%).

## Assessing Perceptions of Clean Fuels: True or False Statements

The plurality of respondents answered **4 out of 7 statements correctly**, but misconceptions remain about biodiesel (16% incorrect, 48% don't know), sustainable aviation fuel (14% incorrect 52% don't know), and renewable natural gas (22% incorrect, 52% don't know), highlighting knowledge gaps.



**\*Note:** the 'Plurality correct' column identifies what questions the plurality of respondents answered correctly. For example, it is true that wood pellets are a type of biofuel that can be used for home heating, and the plurality (66%) of respondents answered this correctly.

**Question 10.** We are interested in whether you think the following statements about clean fuels are true or false. Please do not consult any outside information or leave this survey window.

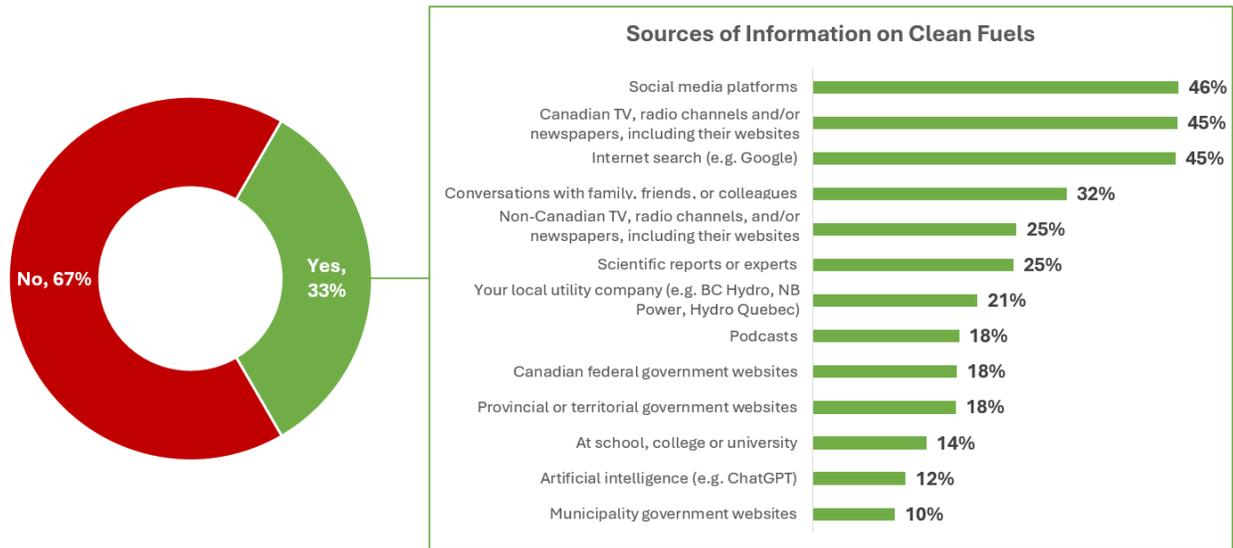
**Sample Size:** n=3020

**Base:** All respondents

Following the completion of the survey project by Forum, one statement regarding the percentage of Canada's energy coming from clean sources was deemed by NRCan to have been erroneously worded, and was thus excluded from the analysis.

## Exposure to Clean Fuels in the Past 6 Months

One third of respondents (33%) have seen, read, or heard about clean fuels in the past 6 months. Of those who have had this exposure to clean fuels, the top sources of this information were **social media platforms** (46%), **Canadian TV/radio/newspaper** (45%), and **via internet search (e.g. Google)** (45%).



**Note:** Responses with <10% rounded are not shown above.

**Question 11.** Have you seen, read, or heard anything about clean fuels (such as hydrogen or biofuel) within the past 6 months? / **Question 12.** Where have you seen, read, or heard about clean fuels in the past 6 months? Please select all that apply. [Multi-select]

**Sample Size:** n=2580 / n=859

**Base:** All respondent excluding 'I don't remember' / Respondents that have seen, read, or heard about clean fuels in the past 6 months

The following groups are significantly more likely to **have seen, read, or heard about clean fuels within the past 6 months** (33%):

- Younger respondents (18 to 34; 37%-38%) and older respondents (65+; 36%) compared to middle-aged respondents (45 to 54; 29%).
- Male (41%) compared to female (26%) respondents.
- Respondents in Atlantic Canada, Manitoba, Saskatchewan, Nunavut, British Columbia, and the Yukon (35%-38%), compared to respondents in Quebec (28%).
- Indigenous (43%) and visible minorities (38%) compared to not indigenous (32%) and non-minority (32%) respondents.

## Sources for Information on Clean Fuels – Top 3

**Older respondents** and **non-visible minorities** report encountering information about clean fuels through Canadian television, radio channels, newspapers, or websites, while **younger respondents** and **visible minorities** cite social media and internet searches as their sources.

	Age						Visible Minority	
	18-24	25-34	35-44	45-54	55-64	65+	Yes	No
	A	B	C	D	E	F	G	H
n=	74	175	141	120	134	215	275	550
Canadian TV, radio channels and/or newspapers, including their websites	28%	33%	40%	45%	46%	64%	35%	51%
				AB	AB	ABCDE		G
Social media platforms	51%	51%	47%	50%	48%	35%	52%	43%
	F	F	F	F	F		H	
Internet search (e.g. Google)	54%	48%	48%	45%	42%	41%	54%	40%
	F						H	

**Question 12.** Where have you seen, read, or heard about clean fuels in the past 6 months? Please select all that apply. [Multi-select]

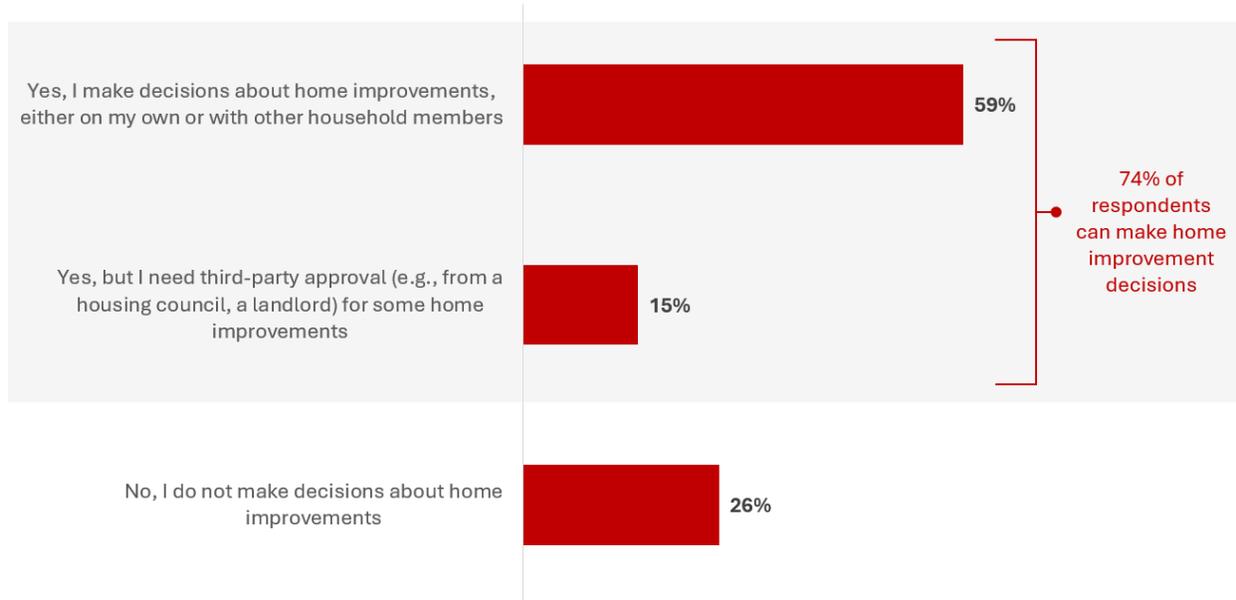
**Sample Size:** n=859

**Base:** Respondents that have seen, read, or heard about clean fuels in the past 6 months

## Clean Fuels in Canadians' Daily Life

### Home Improvement Decision-Making

About three-fourths of respondents (74%) **can make decisions about home improvements** either on their own, with other household members, or with third-party approval.



**Question 14.** Do you make decisions about improvements to your home (e.g., sealing the windows or installing solar panels)?

**Sample Size:** n=2959

**Base:** All respondents, excluding 'prefer not to say' and 'don't know'

The following groups are significantly more likely to make decisions about home improvements **on their own** or **with other household members**:

- Male (62%) compared to female (56%) respondents.
- Respondents in Atlantic Canada, Quebec, Manitoba, Saskatchewan, Nunavut, Northwest Territories, British Columbia, and the Yukon (61%-69%) compared to Ontario respondents (49%).
- Homeowners (85%) compared to renters (19%).

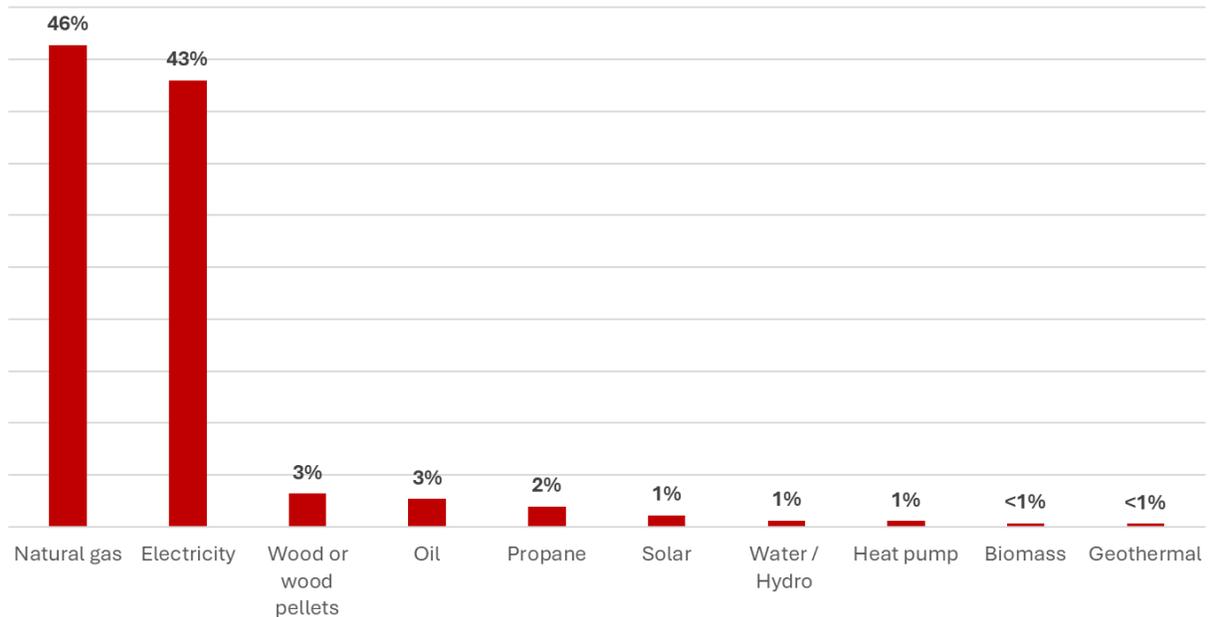
The following groups are significantly more likely to make decisions about home improvements with **third-party approval**:

- Younger respondents (18 to 34; 20%-23%) compared to older respondents (45 to 65+; 10%-16%).
- Respondents in British Columbia and the Yukon (19%) compared to respondents in Atlantic Canada, Manitoba, Saskatchewan, Nunavut, Alberta, and the Northwest Territories (12%-13%).
- Renters (27%) compared to homeowners (8%).

## Primary Home Heating System

The two most popular energies used by respondents for their primary home heating system is **natural gas** (46%) and **electricity** (43%).

All other energies make up only one-tenth of respondents (11%) primary home heating systems.



**Question 15.** What type of energy is used for your primary home heating system?

**Sample Size:** n=2146

**Base:** Respondents that make decisions about improvements to their home, excluding 'don't know'

The following groups are significantly more likely to use **natural gas** energy for their primary home heating system:

- Older respondents (ages 45 to 65+; 46%-58%) compared to younger respondents (ages 18 to 44; 32%-36%).
- Male (50%) compared to female (43%) respondents.
- Homeowners (52%) compared to renters (28%).
- Respondents living in town/row homes, single-detached and semi-detached homes (50%-59%) compared to condos and apartments (25%).
- Higher income respondents (\$60K to \$250K and above; 45%-62%) compared to lower income residents (under \$20K to under \$60K; 30%-35%).

## Primary Home Heating Systems – Top 2

Natural gas was more likely to be used by **single-detached, semi-detached, and town/row homeowners** and respondents with **higher incomes** whereas respondents **renting apartment or condos** and those with **lower incomes** are more likely to use electricity.

	Dwelling Type				Home Ownership	
	Single-detached	Semi-detached	Town/Row home	Apartment or condo	Owned	Rented
	A	B	C	D	E	F
n=	1317	146	182	451	1621	501
Natural Gas	52%	59%	50%	25%	52%	28%
Electricity	36%	38%	40%	67%	38%	61%
				ABC		E

	Income								
	Under \$20K	\$20K to under \$40K	\$40K to under \$60K	\$60K to under \$80K	\$80K to under \$100K	\$100K to under \$150K	\$150K to under \$200K	\$200K to under \$250K	\$250K and above
	G	H	I	J	K	L	M	N	O
n=	113	248	302	290	292	382	192	79	73
Natural Gas	30%	35%	34%	45%	50%	50%	58%	60%	62%
Electricity	53%	52%	51%	43%	42%	39%	37%	33%	32%
	KLMNO	JKLMNO	KLMNO						

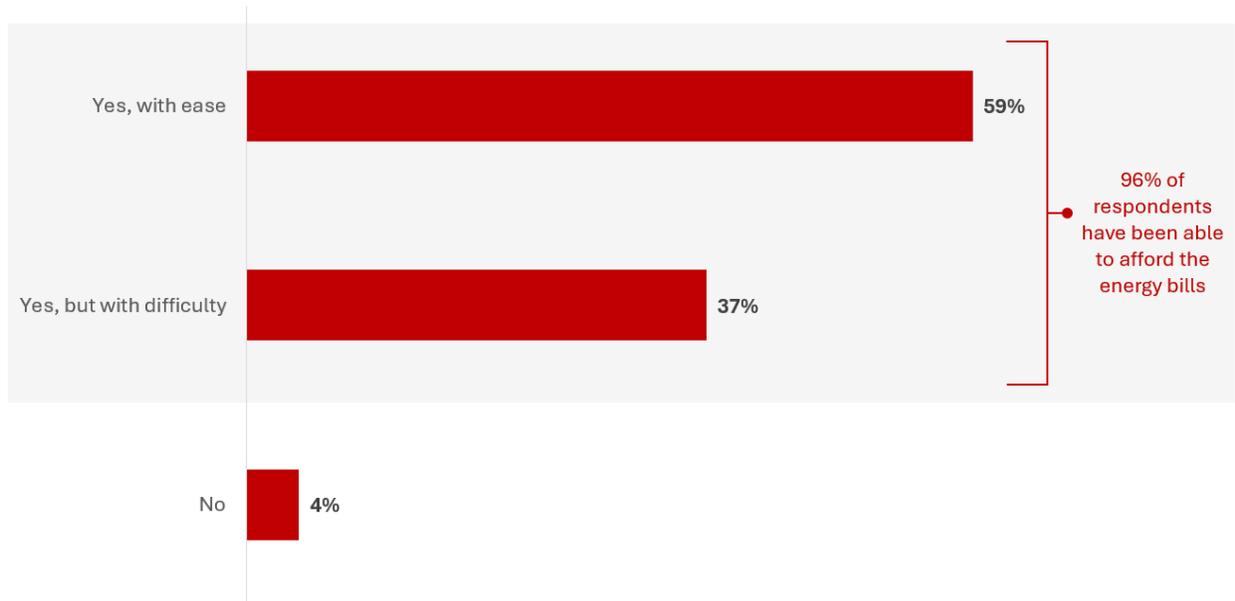
**Question 15.** What type of energy is used for your primary home heating system?

**Sample Size:** n=2147

**Base:** Respondents that make decisions about improvements to their home, excluding 'don't know'

## Affordability of Energy Bills in the Past Two Months

In the past two months, the vast majority of respondents (96%) have been able to afford their energy bills for their household's needs with nearly three-fifths of respondents (59%) affording these bills **with ease**, and nearly two-fifths (37%) **with difficulty**.



**Question 16.** In the past two months, have you been able to afford the energy bills for your household's daily needs?

**Sample Size:** n=2148

**Base:** Respondents that make decisions about improvements to their home, excluding 'prefer not to say'

The following groups are significantly more likely to be able to afford energy bills for their household's daily needs **with ease** (59%):

- Older respondents (ages 65+; 73%) compared to younger residents (ages 18 to 64; 48%-55%).
- Male (63%) compared to female (54%) respondents.
- Respondents living in a semi-detached home (67%) compared to residents living in a town/row home, apartment, or condo (54%-58%).
- Respondents with more education (Bachelors' degree and above; 65%-66%) compared to respondents with less education (less than high school, high school, apprenticeship, college, and university certificate; 37%-55%).

## Affordability of Energy Bills for Different Home Heating Systems

Respondents that use **natural gas** and **electricity** for their home heating system are significantly more likely to be able to afford energy bills for their household's daily needs **with ease** than respondents that use **oil** or **propane** for the same system.

	Not Clean Fuels				Clean Fuels		
	Oil	Natural gas	Propane	Wood/Wood pellets	Electricity	Solar	Biomass
	A	B	C	D	E	F	G
n=	58	982	41	67	907	23*	7*
Yes, with ease	44%	58%	41%	58%	61%	73%	28%
		AC			AC		
Yes, but with difficulty	49%	38%	43%	38%	35%	18%	42%
	E						
No	7%	4%	16%	4%	4%	9%	30%
			BE				

**\*Note:** Small sample size, interpret with caution.

**Question 16.** In the past two months, have you been able to afford the energy bills for your household's daily needs?

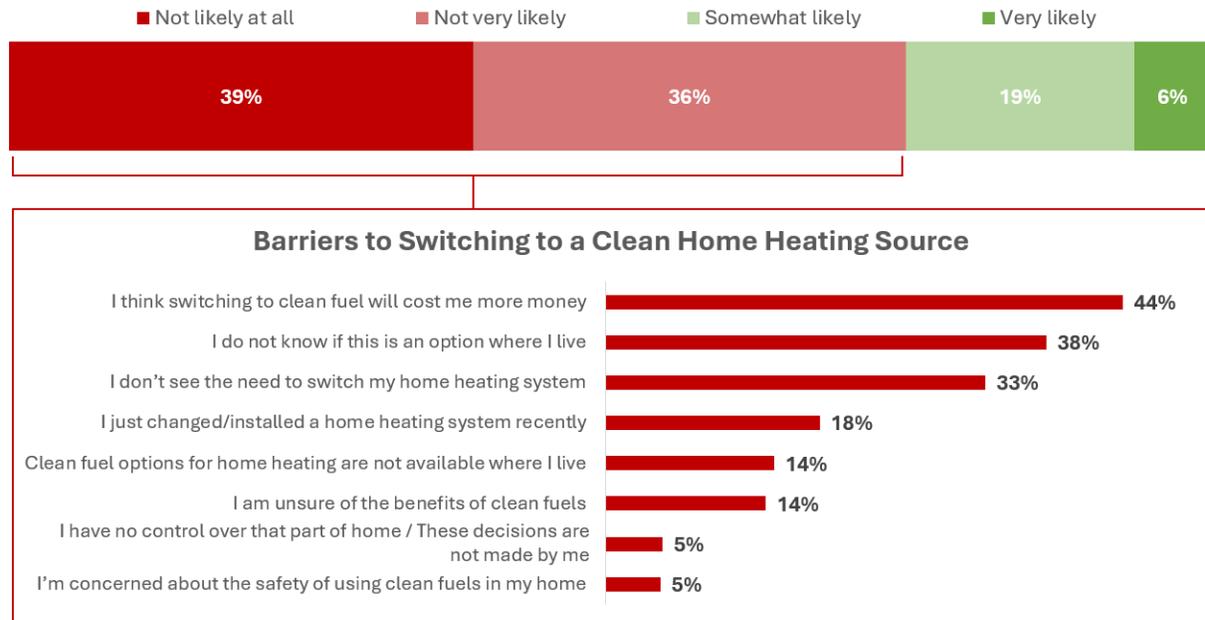
**Sample Size:** n=2148

**Base:** Respondents that make decisions about improvements to their home, excluding 'prefer not to say'

## Reasons for not Changing Home Heating System to a Clean Energy

The majority of respondents (BTM2: 75%) are unlikely to switch to a clean home heating system within the next year.

The top barriers include **cost concerns** (42%), **uncertainty about availability** (38%), and **a lack of perceived need** (32%).



**Question 17.** You indicated your home's primary heating source is [Q15 response here]. How likely would you be to change your home heating system to one that uses a clean fuel within the next year? / **Question 18.** You indicated that you would be unlikely to change your home heating source to a clean fuel within the next year. Why not? Please select all that apply.

**Sample Size:** n=1161 / 867

**Base:** Respondents that make decisions about improvements to their home, and use a not clean fuel for their primary home heating system, excluding 'not stated' / Respondents that are not likely to change home heating to a clean fuel

The following groups are significantly **less likely to switch to a clean home heating system** (BTM2: 75%) within the next year:

- Male (78%) compared to female (71%) respondents.
- Non-minority (80%) compared to visible minority respondents (56%).
- Homeowners (77%) compared to renters (63%).
- Respondents living in a semi-detached home (83%) compared to those living in a town/row home, apartment, or condo (69%-71%).

The following groups are significantly more likely to not switch to a clean home heating source due to **cost concerns** (42%):

- Respondents ages 45 to 54 (52%) compared to respondents ages 65+ (42%).
- Respondents in all other regions (42%-52%) compared to respondents in Quebec (18%).

## Likelihood to Change to a Clean Fuel Home Heating System

**Younger respondents**, those living in the **Atlantic Canada** region, and those with **lower incomes** are significantly more likely to change their home heating system to one that uses clean fuel compared to **older** respondents, those living in **all other regions**, and those with **higher incomes**.

	Age						Region					
	18-24	25-34	35-44	45-54	55-64	65+	Atlantic Canada	QC	ON	MB/SK/NU	AB/NT	BC/YU
	A	B	C	D	E	F	G	H	I	J	K	L
n=	42	130	159	188	261	381	75	66	400	201	233	187
TOP2	41%	51%	38%	25%	19%	14%	51%	24%	24%	21%	28%	21%
	EF	CDEF	DEF	F			HIJKL					
BTM2	59%	49%	62%	75%	81%	86%	49%	76%	76%	79%	72%	79%
			B	BC	ABC	ABCD		G	G	G	G	G

	Income									
	Under \$20K	\$20K to under \$40K	\$40K to under \$60K	\$60K to under \$80K	\$80K to under \$100K	\$100K to under \$150K	\$150K to under \$200K	\$200K to under \$250K	\$250K and above	
	M	N	O	P	Q	R	S	T	U	
n=	46	108	141	154	167	216	120	49	48	
TOP2	38%	34%	28%	28%	26%	25%	18%	20%	22%	
	S	S	S	S						
BTM2	62%	66%	72%	72%	74%	75%	82%	80%	78%	
							MNOP			

**Question 17.** You indicated your home's primary heating source is [Q15 response here]. How likely would you be to change your home heating system to one that uses a clean fuel within the next year

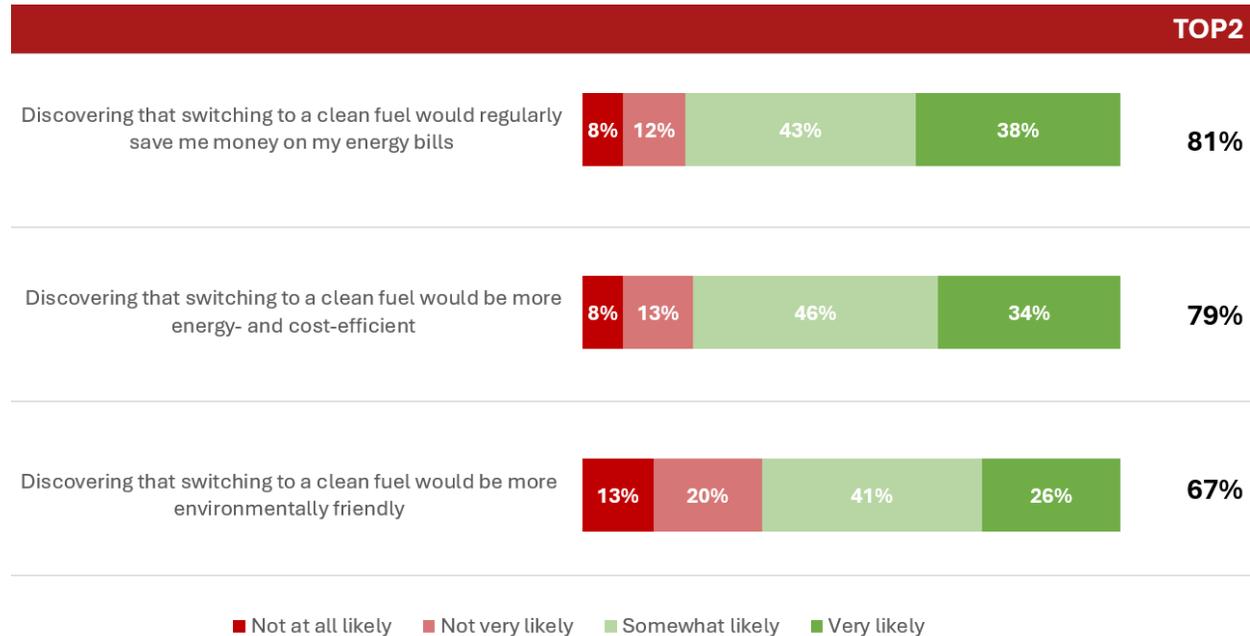
**Sample Size:** n=1161

**Base:** Respondents that make decisions about improvements to their home, and use a not clean fuel for their primary home heating system, excluding 'not stated'

## Factors That Could Encourage Switching to a Clean Home Heating Source

About four-fifths of respondents (TOP2: 81%) would consider switching to clean fuel if it **regularly saved them money on energy bills**, while nearly as many (TOP2: 79%) would switch for **better energy- and cost-efficiency**.

This suggests financial savings outweigh environmental concerns as a motivator.



**Question 19.** How likely would any of the below reasons make you seriously consider switching your primary home heating to a clean fuel?

**Sample Size:** n=1161

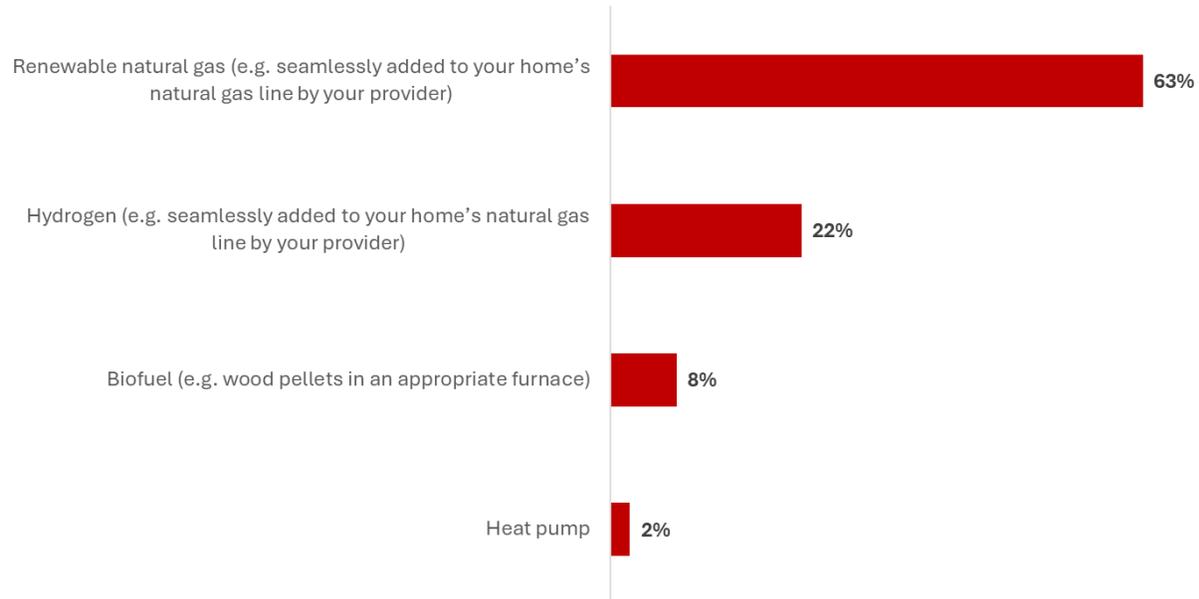
**Base:** Respondents that make decisions about improvements to their home, and use a not clean fuel for their primary home heating system, excluding 'not stated'

The following groups are significantly more likely to switch their primary home heating system to clean fuel if **it regularly saved them money on energy bills** (TOP2):

- Younger and middle-aged respondents (ages 25 to 44; 86%-90%) compared to older respondents (ages 55 to 65+; 76%-78%).
- Young respondents (ages 25-34; 90%) compared to middle-aged respondents (ages 45-54; 82%).
- Respondents living in Atlantic Canada, Alberta, and Northwest Territories (85%-86%) compared to respondents living in Quebec, British Columbia, and the Yukon (70%-75%).
- Renters (87%) compared to homeowners (80%).
- Respondents that are working full-time, part-time, or looking for work (84%-89%) compared to retired respondents (75%).

## Preferred Clean Fuel Option for Home Heating

If offered an option to switch from their current unclean fuel to a clean fuel for home heating, about three-fifths of respondents (63%) would choose **renewable natural gas**, and about one-fifth (22%) would choose **hydrogen**.



**Note:** Responses with <2% rounded are not shown above.

**Question 20.** If you were offered the option to switch to a clean fuel for home heating, which would you be most likely to choose?

**Sample Size:** n=940

**Base:** Respondents that make decisions about improvements to their home, and use a not clean fuel for their primary home heating system, excluding 'I don't know'

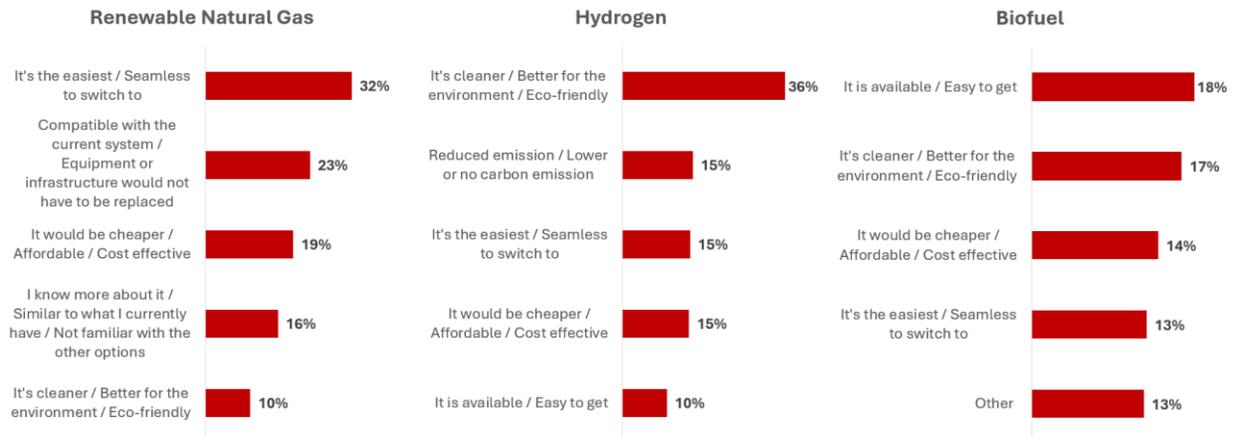
The following groups are significantly more likely to choose **renewable natural gas** (63%):

- Older respondents (65+; 69%) compared to younger respondents (25-34, 45-64; 58%-60%).
- Respondents in Ontario, Manitoba, Saskatchewan, Nunavut, British Columbia, and the Yukon (66%-68%) compared to respondents in Atlantic Canada (44%).
- Respondents in Ontario, Manitoba, Saskatchewan, and Nunavut (67%-68%) compared to respondents in Alberta and the Northwest Territories (56%).
- Respondents with a high school, bachelors', and above bachelors' education (64%-67%) compared to respondents with an apprenticeship (49%).
- Respondents working full-time (63%) or retired (66%) compared to self-employed respondents (48%).
- Respondents with a higher income (\$80K to under \$100K, and \$150K to under \$200K; 67%-69%) compared to respondents with a lower income (\$20K to under \$40K; 53%).

## Reason for Preferred Clean Fuel Option for Home Heating

Respondents that are most likely to choose **renewable natural gas** mention that **it is the easiest and seamless to switch to** (32%).

Those preferring **hydrogen** highlight how **it is cleaner and better for the environment** (36%) while respondents favoring **biofuel** emphasize its **availability and how it's easy to get** (18%).



**Question 21.** Why would you be most likely to choose [Question 20 answer, excluding 'don't know']

**Sample Size:** n=940

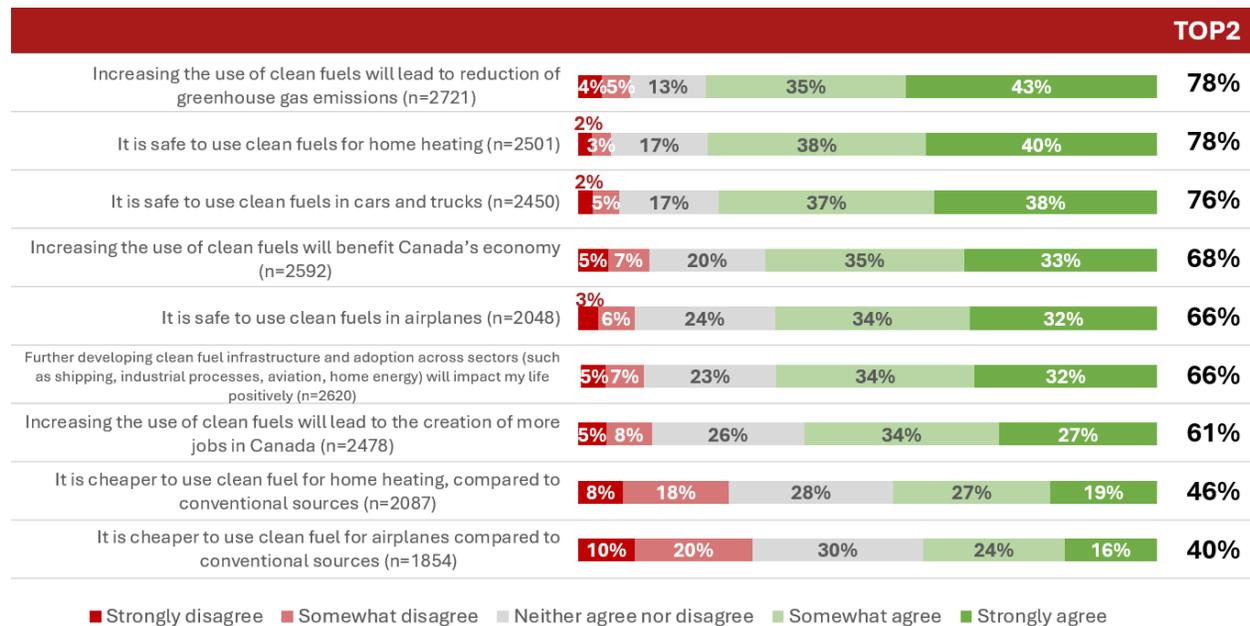
**Base:** Respondents that make decisions about improvements to their home, and use a not clean fuel for their primary home heating system

## Knowledge / Perceptions of Clean Fuels Usage

### Agreement or Disagreement on Clean Fuels Economic, Environmental, and Safety Impacts

Nearly four-fifths of respondents (TOP2: 78%) agree that **increasing the use of clean fuels will lead to reduction of greenhouse gas emissions** and that **it is safe to use clean fuels for home heating**.

On the contrary, only two-fifths (TOP2: 40%) agree **it is cheaper to use clean fuel for airplanes compared to conventional resources**.



**Question 22.** Please rate your agreement or disagreement with the following:

**Sample Size:** Shown in chart above

**Base:** All respondents, excluding 'don't know'

The following groups are significantly more likely to **agree** that **increasing the use of clean fuels will lead to reduction of greenhouse gas emissions** (TOP2):

- Older respondents (ages 65+; 82%) compared to younger (ages 25 to 34; 77%) and middle-aged respondents (ages 55 to 64; 74%).
- Female (81%) compared to male (75%) respondents.
- Respondents living in Quebec and Ontario (80%) compared to respondents living in Manitoba, Saskatchewan, and Nunavut (73%).
- Retired (81%) compared to respondents working full-time (77%).

The following groups are significantly more likely to **agree** that **it is safe to use clean fuels for home heating** (TOP2):

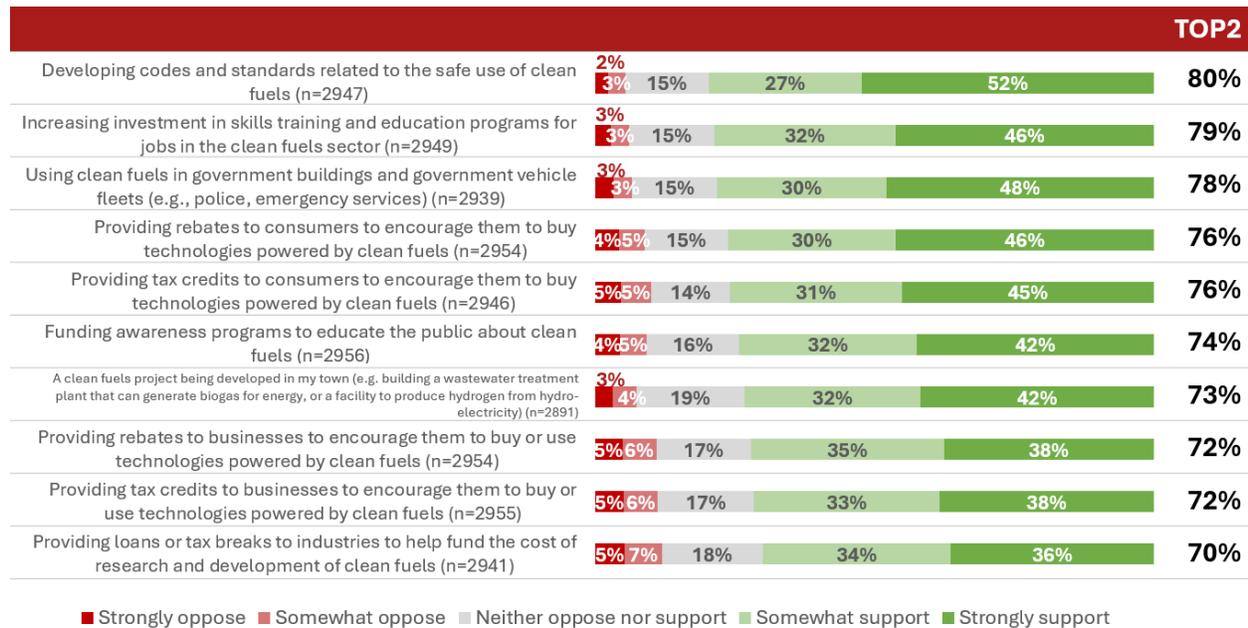
- Older respondents (ages 65+; 83%) compared to younger respondents (ages 18 to 44, and 55 to 64; 74%-77%).

- Respondents living in Ontario, British Columbia, and the Yukon (79%-80%) compared to respondents living in Quebec (74%).
- Retired (81%) compared to respondents working full-time (76%).

### Support or Opposition for Initiatives Promoting Clean Fuels

Four-fifths of respondents (TOP2: 80%) support **developing codes and standards related to the safe use of clean fuels**.

Nearly four-fifths support **increasing investment in skills training and education programs for jobs in the clean fuels sector** (TOP2: 79%) and **using clean fuels in government buildings and government vehicle fleets** (TOP2: 78%).



#### Question 23. To what extent do you support or oppose the following?

**Sample Size:** Shown in chart above

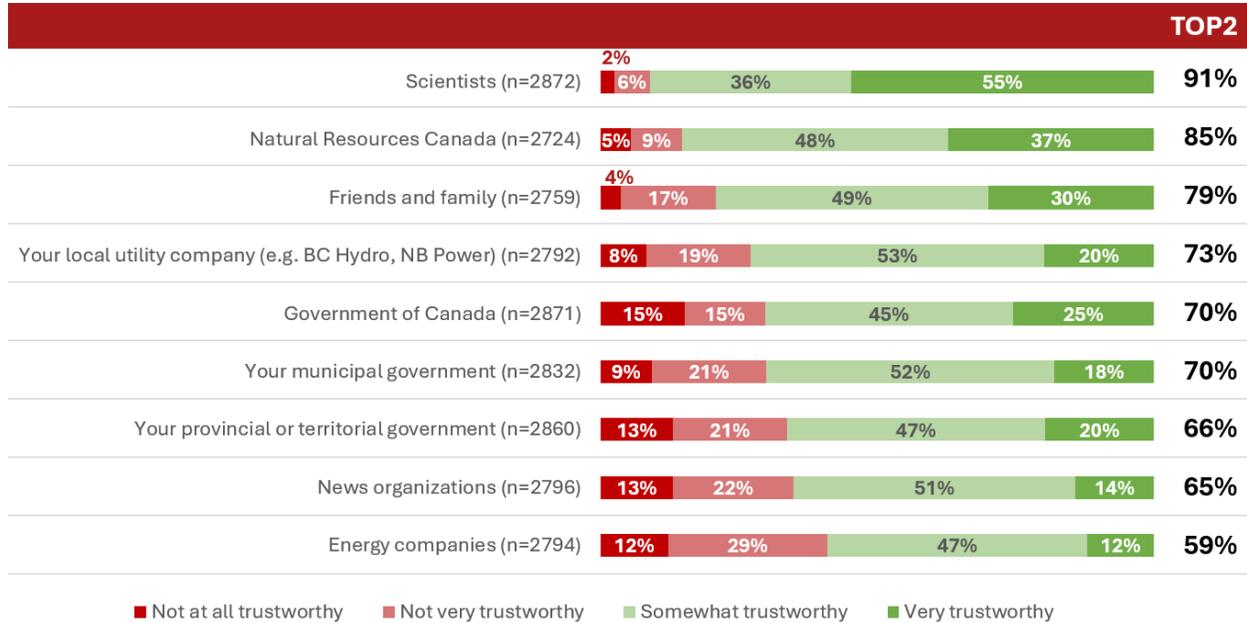
**Base:** All respondents, excluding ‘don’t know’

The following groups are significantly more likely to support developing codes and standards related to the safe use of clean fuels (TOP2):

- Middle to older aged respondents (ages 35 to 65+; 79%-85%) compared to younger respondents (ages 18 to 24; 71%).
- Older respondents (ages 65+; 85%) compared to all other ages (ages 18 to 64; 71%-80%).
- Female (82%) compared to male (77%) respondents.
- Respondents living in Ontario (83%) compared to respondents living in Quebec, Manitoba, Saskatchewan, and Nunavut (77%).
- Non-indigenous respondents (82%) compared to indigenous respondents (67%).

## Trustworthiness of Sources on Clean Fuels Information

The vast majority of respondents trust **scientists** (TOP2: 91%) to provide accurate information about clean fuels, followed closely by **Natural Resources Canada** (TOP2: 85%).



**Question 24.** How trustworthy or untrustworthy do you find each of the following people or organizations at sharing accurate information about clean fuels? :

**Sample Size:** Shown in chart above

**Base:** All respondents, excluding 'don't know'

The following groups are significantly more likely to trust **Scientists** (TOP2):

- Respondents ages 25 to 34 (93%) compared to respondents ages 18 to 24 (88%) and 55 to 64 (88%).
- Respondents ages 65+ (92%) compared to respondents ages 55 to 64 (88%).
- Female (93%) compared to male (89%) respondents.
- Non-indigenous (92%) compared to indigenous (83%) respondents.

## Trustworthiness of Natural Resources Canada on Clean Fuels Information

Respondents in **Atlantic Canada, Quebec, and Ontario, non-indigenous, visible minorities, and ages 25 to 34** express greater trust in Natural Resources Canada on clean fuels information. Additionally, respondents that have **greater worry about climate change** express greater trust in Natural Resources Canada.

	Region						Age					
	Atlantic Canada	QC	ON	MB/SK/NU	AB/NT	BC/YU	18-24	25-34	35-44	45-54	55-64	65+
	A	B	C	D	E	F	K	L	M	N	O	P
n=	257	556	837	326	374	375	205	460	462	446	487	663
TOP2	90%	88%	86%	84%	80%	82%	87%	88%	85%	84%	82%	86%
	DEF	EF	E					O				
BTM2	10%	12%	14%	16%	20%	18%	13%	12%	15%	16%	18%	14%
				A	ABC	AB					L	

	Climate Change Worries					Indigenous		Visible Minority	
	Not worried at all	Slightly worried	Moderately worried	Very worried	Extremely worried	No	Yes	Yes	No
	Q	R	S	T	U	G	H	I	J
n=	352	381	713	659	609	2454	163	756	1834
TOP2	52%	82%	89%	93%	92%	86%	76%	89%	85%
		Q	QR	QRS	QR	H		J	
BTM2	48%	18%	11%	7%	8%	14%	24%	11%	15%
	RSTU	STU	T				G		I

**Question 24.** How trustworthy or untrustworthy do you find each of the following people or organizations at sharing accurate information about clean fuels? :

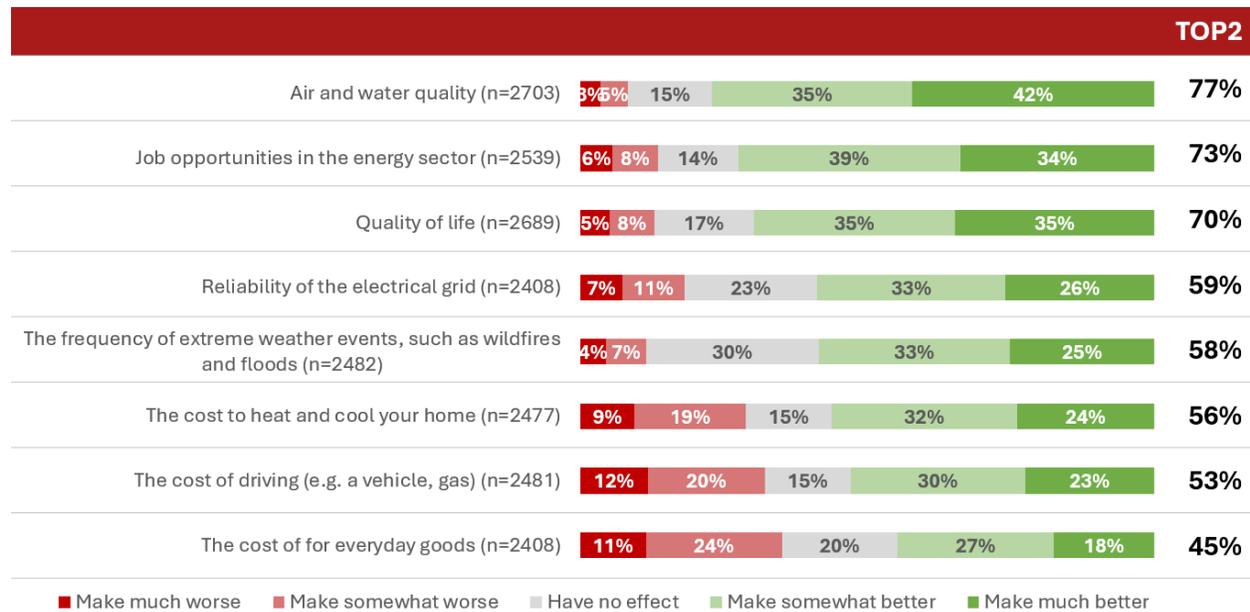
**Sample Size:** n=2724

**Base:** All respondents, excluding 'don't know'

## Climate / Energy Attitudes and Beliefs

### The Future of Energy in Canada: Local Impacts of a Shift to Clean Fuels

About three-fourths of respondents (TOP2: 77%) think that increasing energy production from clean fuels and greatly decreasing production from fossil fuel sources will **make air and water quality better**. Respondents think these actions will also **make job opportunities to the energy sector better** (TOP2: 73%) and **make quality of life better** (TOP2: 70%).



**Question 25.** Thinking about life in Canada over the next 30 years: If Canada greatly increases energy production from clean fuels like hydrogen, biofuels and natural gas, and greatly decreases production from fossil fuel sources such as oil and conventional natural gas, how do you think it would impact each of the following, in your local area?

**Sample Size:** Shown in chart above

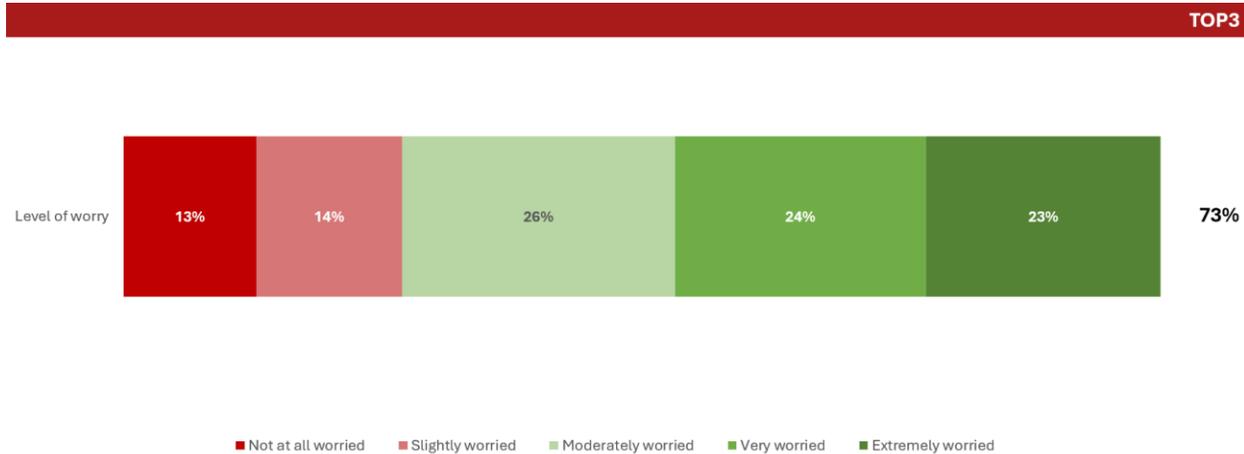
**Base:** All respondents, excluding 'don't know' and 'prefer not to say'

The following groups are significantly more likely to think that increasing energy production from clean fuels and greatly decreasing production from fossil fuel sources will **make air and water quality better** (TOP2):

- Respondents ages 18 to 24 (80%) compared to respondents ages 35 to 44 (72%).
- Older respondents (ages 65+; 83%) compared to younger respondents (ages 25 to 64; 72%-77%).
- Female (80%) compared to male (74%) respondents.
- Respondents that are students (84%) or retired (81%) compared to respondents that work full time, are self-employed, or looking for work (72%-76%).
- Non-indigenous (79%) compared to indigenous (65%) respondents.

## Level of Worry About Climate Change

Nearly three-fourths of respondents (TOP3: 73%) are **worried about climate change** to some degree. This group is evenly split between extreme (23%), very (24%), and moderate (26%) levels of worry.



**Older and male** respondents, along with those residing in **Manitoba, Saskatchewan, Nunavut, Alberta, Northwest Territories, British Columbia** and the **Yukon** are more likely to not be worried at all about climate change at all.

	Age						Gender		Region					
	18-24	25-34	35-44	45-54	55-64	65+	Male	Female	Atlantic Canada	QC	ON	MB/SK/NU	AB/NT	BC/YU
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
n=	226	514	508	483	541	728	1459	1508	287	601	930	349	405	429
Not at all worried	8%	7%	13%	14%	20%	12%	17%	9%	11%	8%	10%	21%	18%	15%
			AB	AB	ABCDF	AB	H					IJKN	IJK	JK
Extremely worried	23%	27%	24%	18%	21%	22%	18%	27%	21%	22%	30%	18%	15%	21%
		DEF	D					G	M	M	IKLMN			M

**Question 26.** To what extent are you worried about climate change?

**Sample Size:** n=3000

**Base:** All respondents, excluding 'prefer not to say'

## Demographics

### Province or Territory

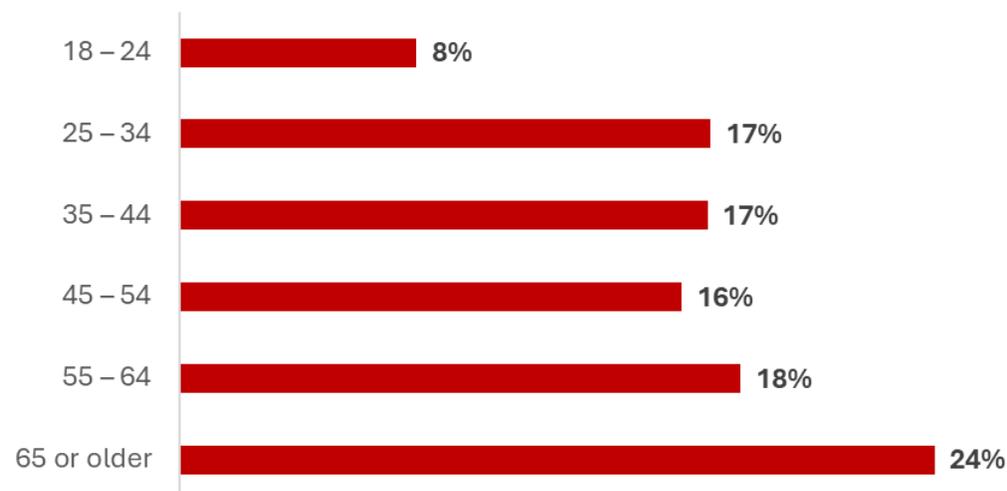
Province	Quota	Weighted	Unweighted
Ontario	31%	31%	31%
Quebec	20%	20%	20%
British Columbia	14%	14%	14%
Alberta	13%	13%	14%
Manitoba	6%	6%	6%
Saskatchewan	5%	5%	5%
Nova Scotia	4%	4%	4%
New Brunswick	3%	3%	3%
Newfoundland and Labrador	2%	2%	2%
Prince Edward Island	1%	1%	1%
Northwest Territories	<1%	<1%	<1%
Yukon	<1%	<1%	<1%
Nunavut	<1%	<1%	<1%

**Question 4.** In which province or territory do you live?

**Sample Size:** N=3020

**Base:** All respondents

### Age



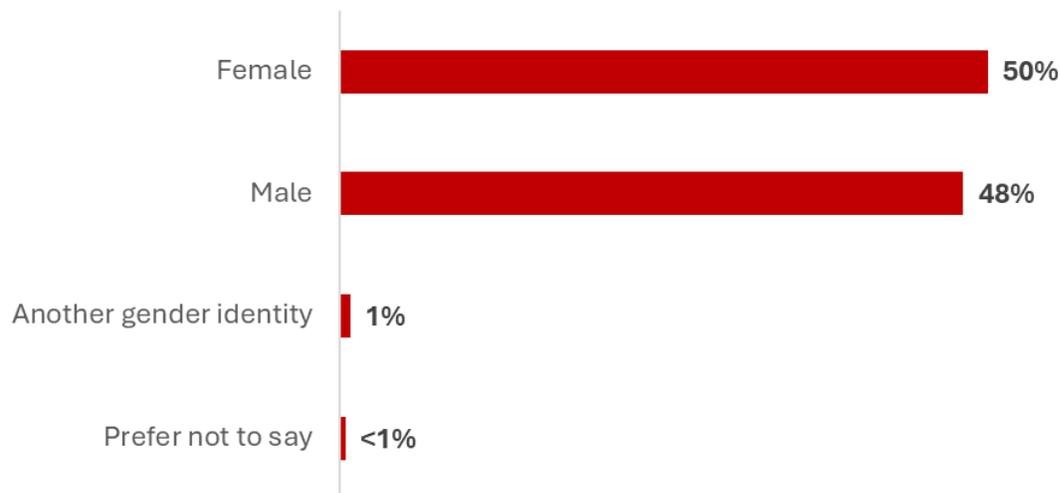
Age	StatsCan	Weighted	Unweighted
18 – 24	8%	8%	7%
25 – 34	17%	17%	19%
35 – 44	17%	17%	16%
45 – 54	16%	16%	16%
55 – 64	18%	18%	16%
65 or older	24%	24%	26%

**Question 1/2.** What year were you born / Which of the following age categories do you belong to?

**Sample Size:** n=3020

**Base:** All respondents

## Gender



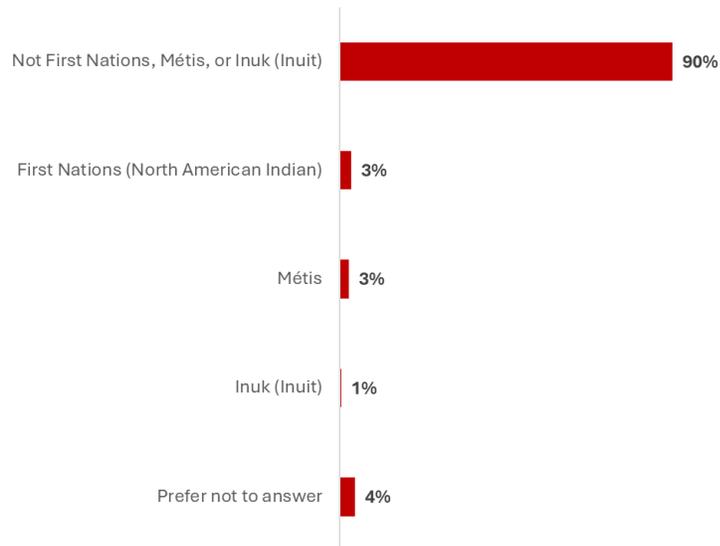
Gender	StatsCan	Weighted	Unweighted
Male	49%	48%	49%
Female	51%	50%	50%
Another gender identity	-	1%	1%
Prefer not to say	-	<1%	<1%

**Question 3.** What is your gender?

**Sample Size:** n=3020

**Base:** All respondents

## First Nations, Métis, or Inuk (Inuit)

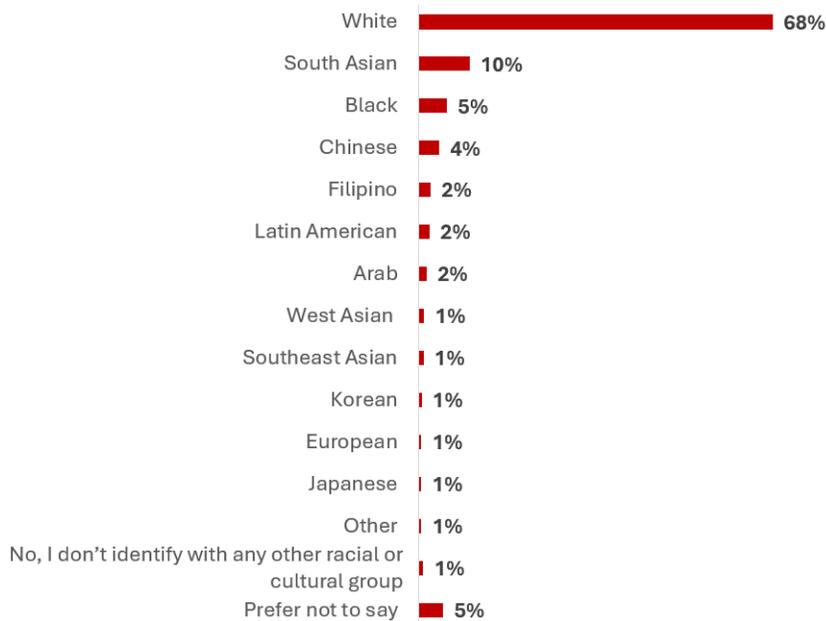


**Question 27.** Are you First Nations, Métis, or Inuk (Inuit)? Note: First Nations (North American Indian) includes Status and Non-Status Indians. Please select all that apply. [Multi-select]

**Sample Size:** n=3020

**Base:** All respondents

## Race or Cultural Group

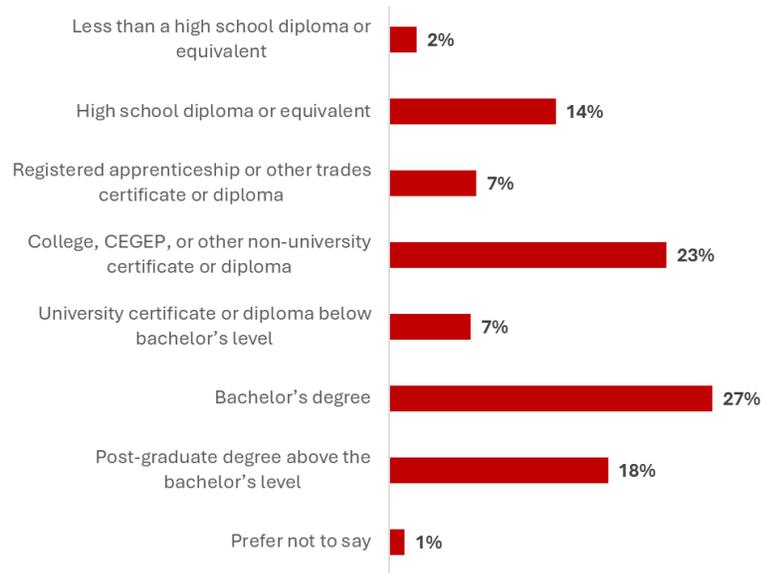


**Question 28/29.** You may belong to one or more racial or cultural groups on the following list. Are you...? (Please select all that apply) [Multi-select]

**Sample Size:** n=3020

**Base:** All respondents

## Education

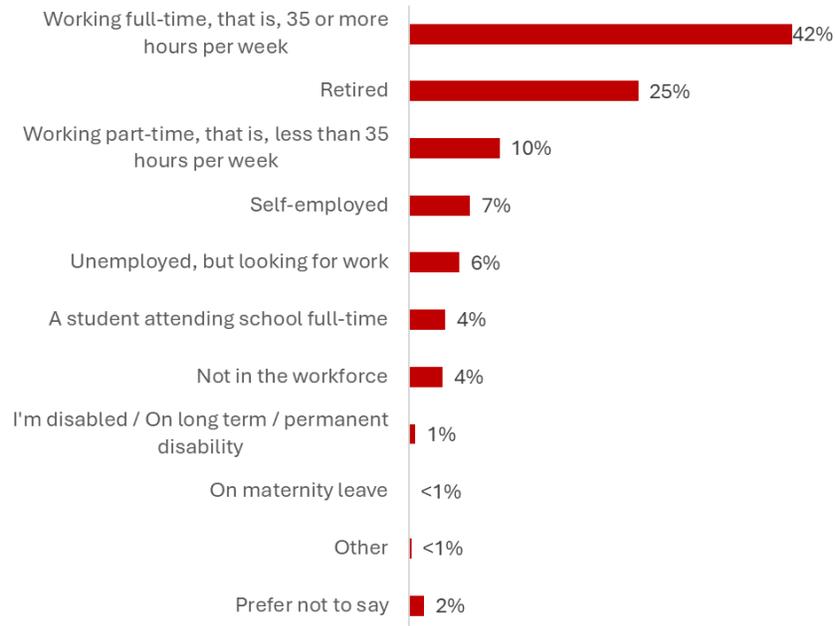


**Question 30.** What is the highest level of formal education that you have completed?

**Sample Size:** n=3020

**Base:** All respondents

## Employment Status



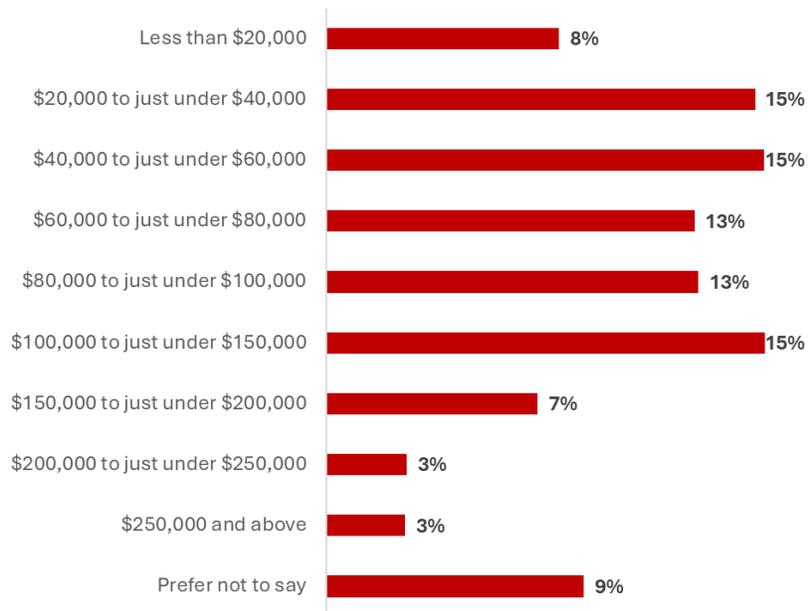
**Question 31.** Which of the following categories best describes your current employment status?

Are you...

**Sample Size:** n=3020

**Base:** All respondents

## Household Income

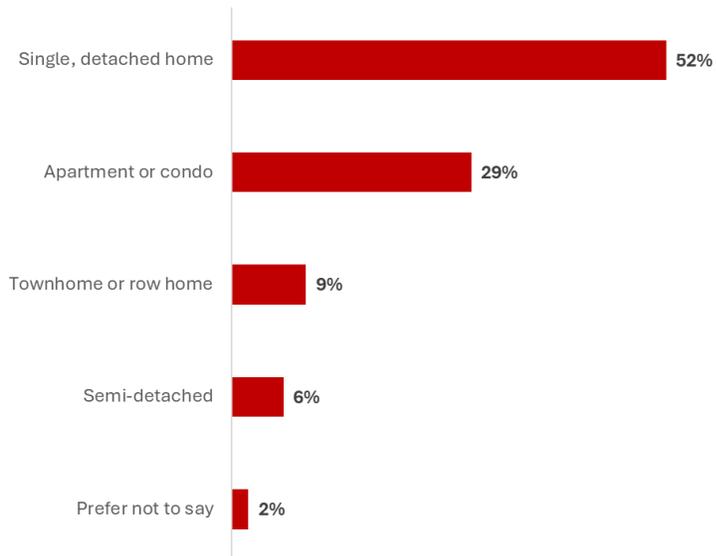


**Question 32.** Which of the following best describes your total household income last year, from all sources, for all household members, before taxes?

**Sample Size:** n=3020

**Base:** All respondents

## Dwelling Type



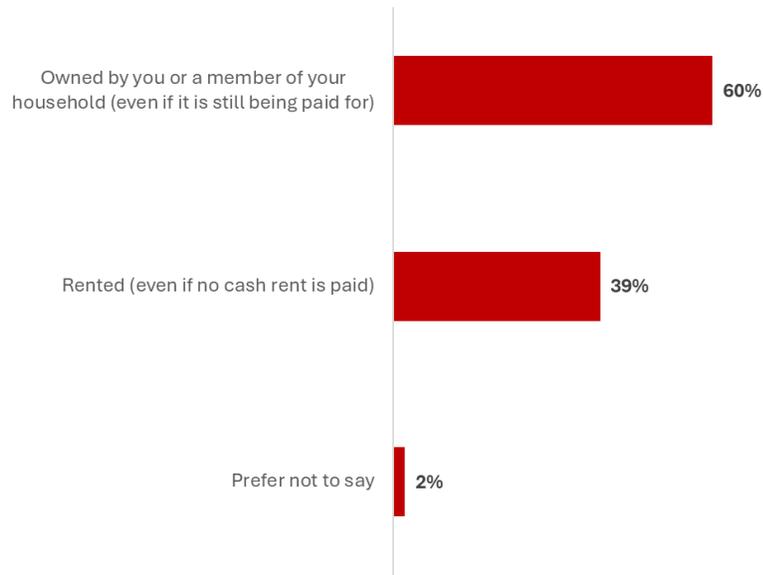
**Note:** Responses with >1% rounded are not shown above.

**Question 33.** Which of the following best describes the type of dwelling in which you live?

**Sample Size:** n=3020

**Base:** All respondents

## Home Ownership



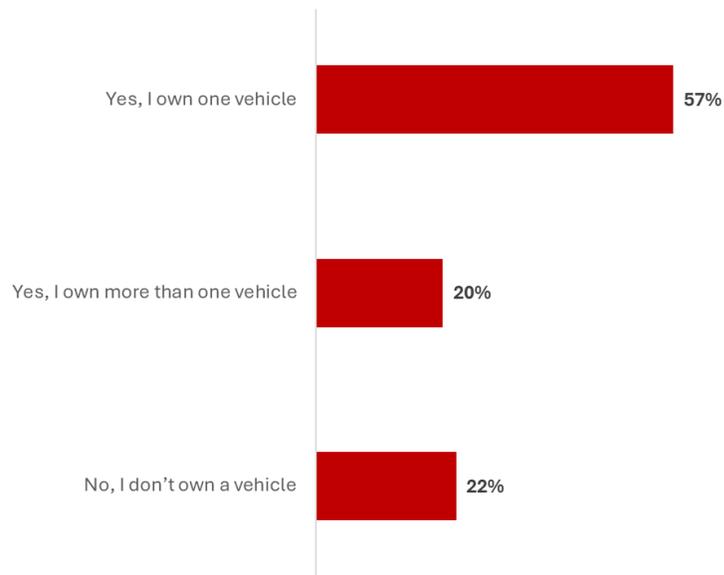
**Note:** Responses with <1% rounded are not shown above.

**Question 13.** Are your living quarters...

**Sample Size:** n=3020

**Base:** All respondents

## Vehicle Ownership

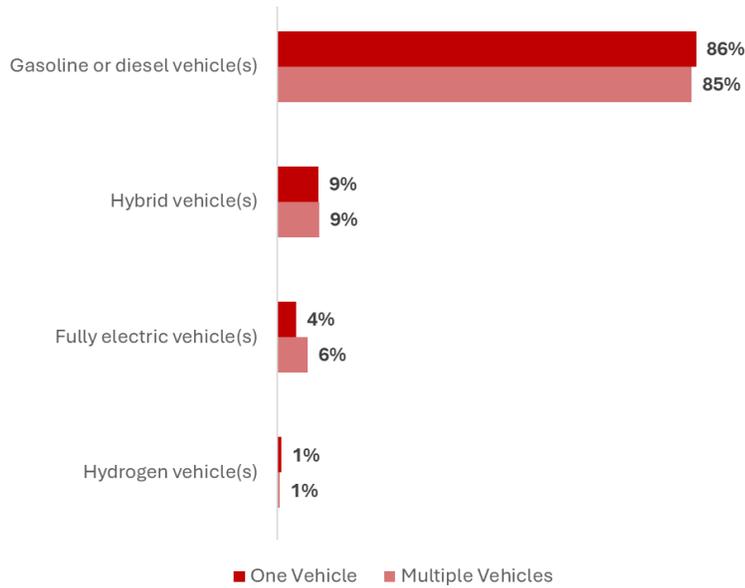


**Question 34.** Do you own a vehicle or vehicles (a car, SUV, pick up truck, etc.)?

**Sample Size:** n=3020

**Base:** All respondents

### Vehicle Type(s)

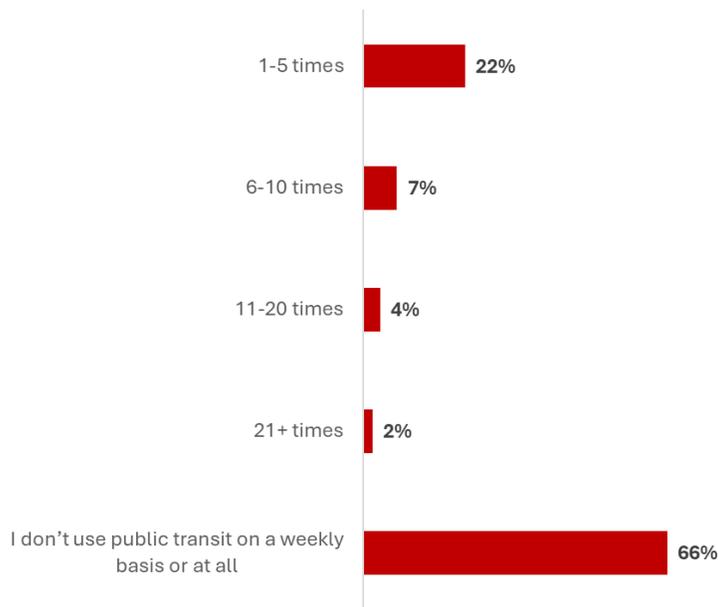


**Question 35/36.** What type of vehicle do you own? / What type of vehicle(s) do you own? Please select all that apply.

**Sample Size:** n=1727 / n=614

**Base:** Respondents who own one vehicle / Respondents who own more than one vehicle

### Public Transit Usage

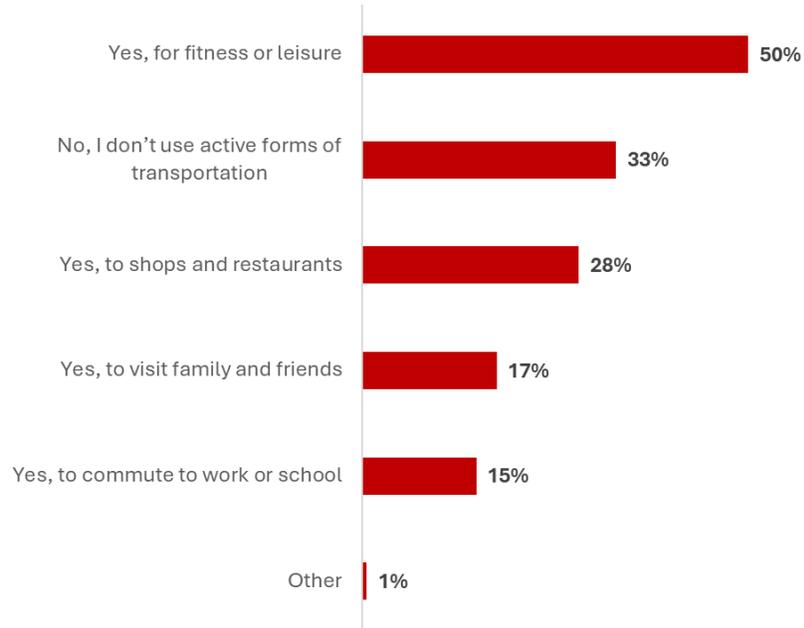


**Question 37.** On average, how many times per week do you use public transit?

**Sample Size:** n=3020

**Base:** All respondents

## Active Transportation



**Note:** Responses with <1% rounded are not shown above.

**Question 38.** Do you use active forms of transportation such as biking and walking? Please select all that apply.

**Sample Size:** n=3020

**Base:** All respondents