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June 2024

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# Gauging the Flame

Public Perceptions and Advocacy  
Insights on Natural Gas



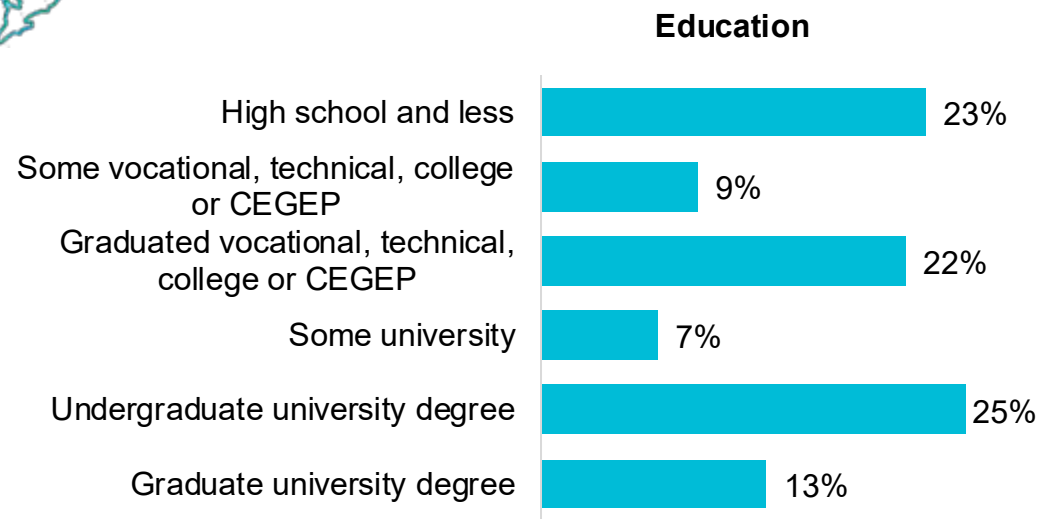
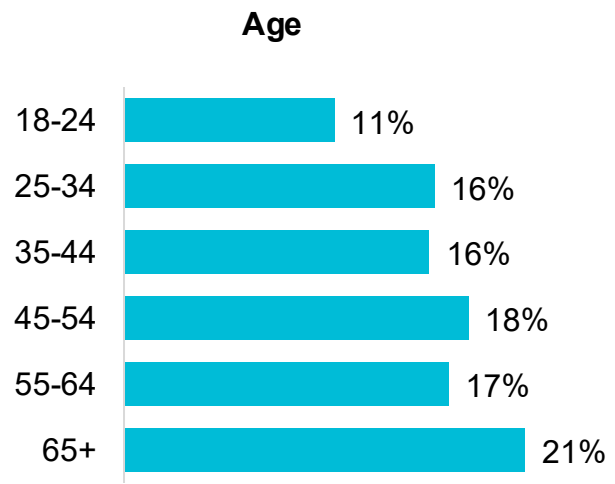
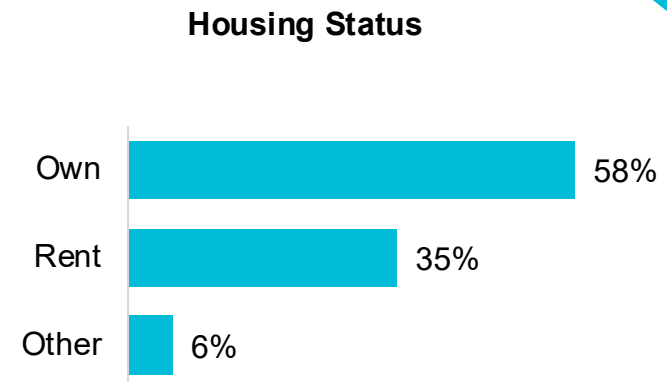
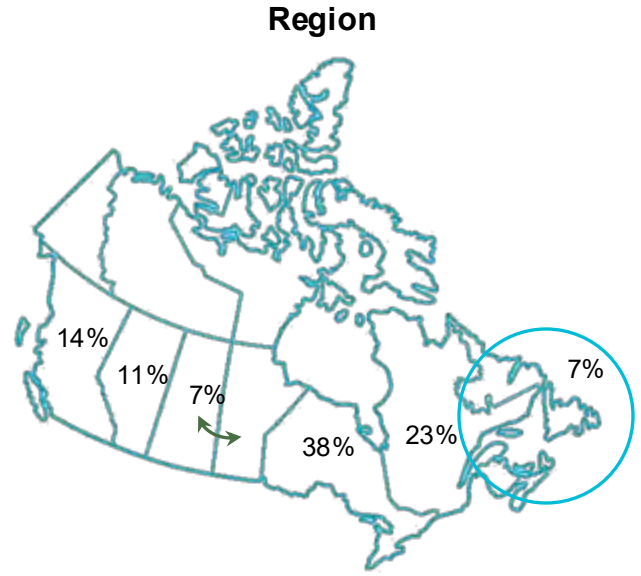
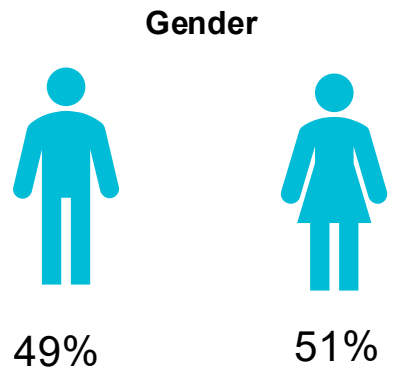
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# Methodology

- Participants: Representative sample of 2,000 Canadians,  
A comparable margin of error approximation would be  $\pm 2.2\%$ ,
- Timeframe: June 14–17, 2024
- Objective: Measure awareness, favourability, and perceptions related to natural gas

# Respondent Profile



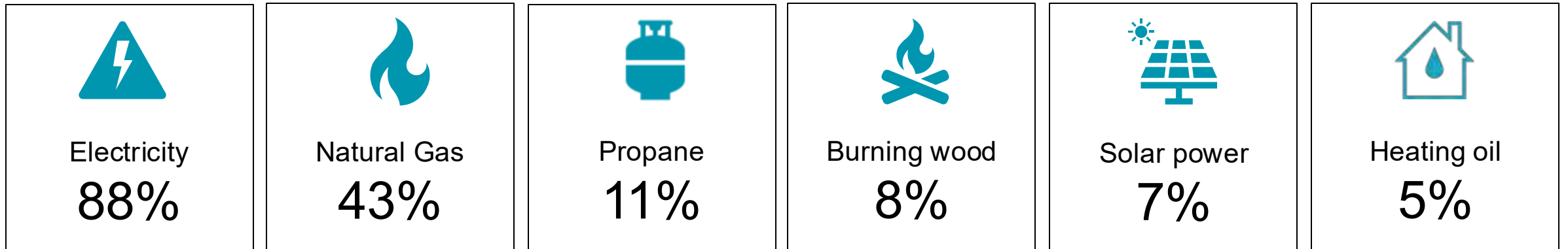
# Energy Sources – Usage and Perceptions





# Energy Sources in Household Consumption

Q: Which energy source(s) do you currently use in your household?

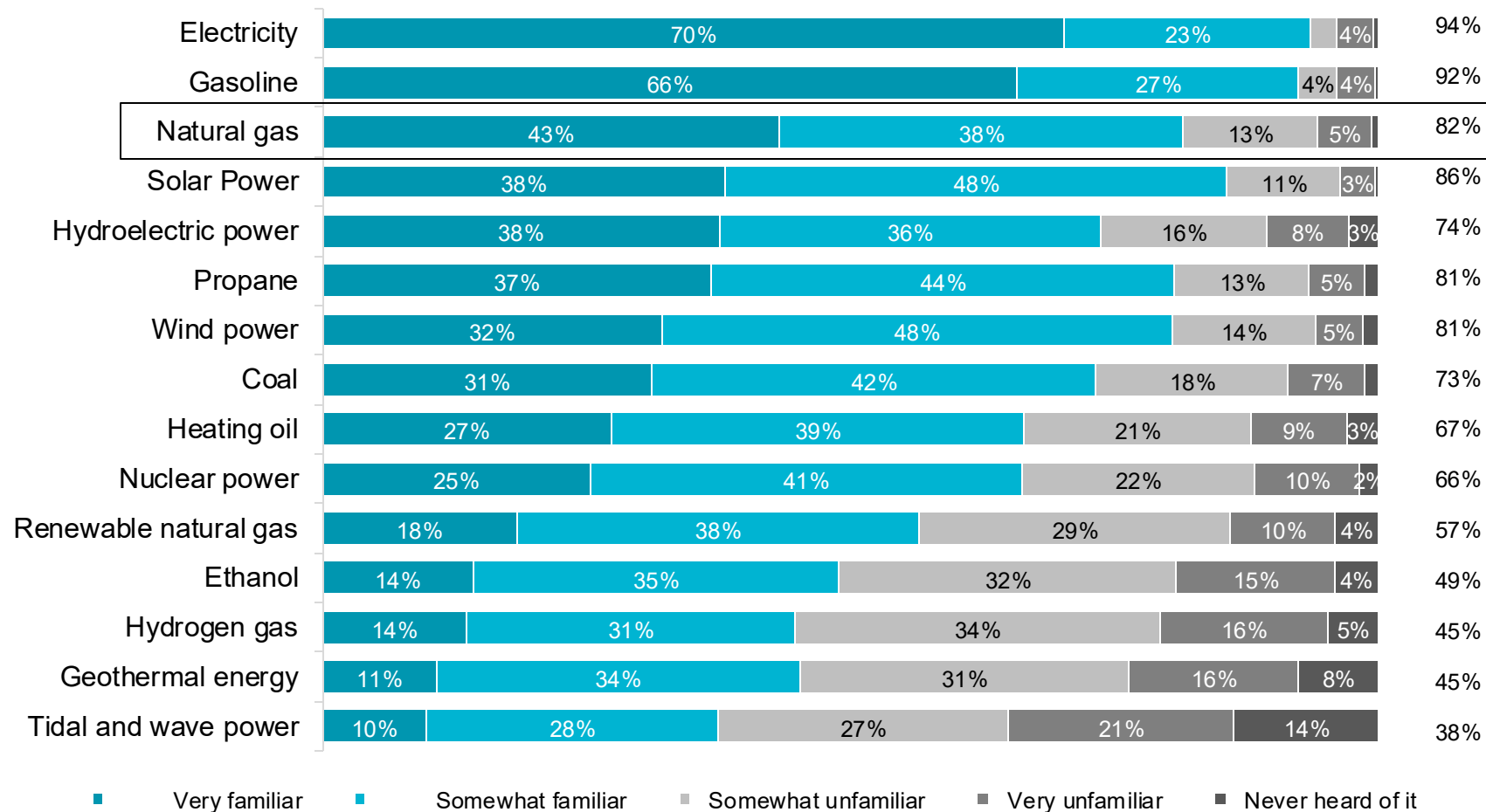




# Familiarity with Natural Gas

Q: If you have heard of it, please indicate how familiar you are with it?

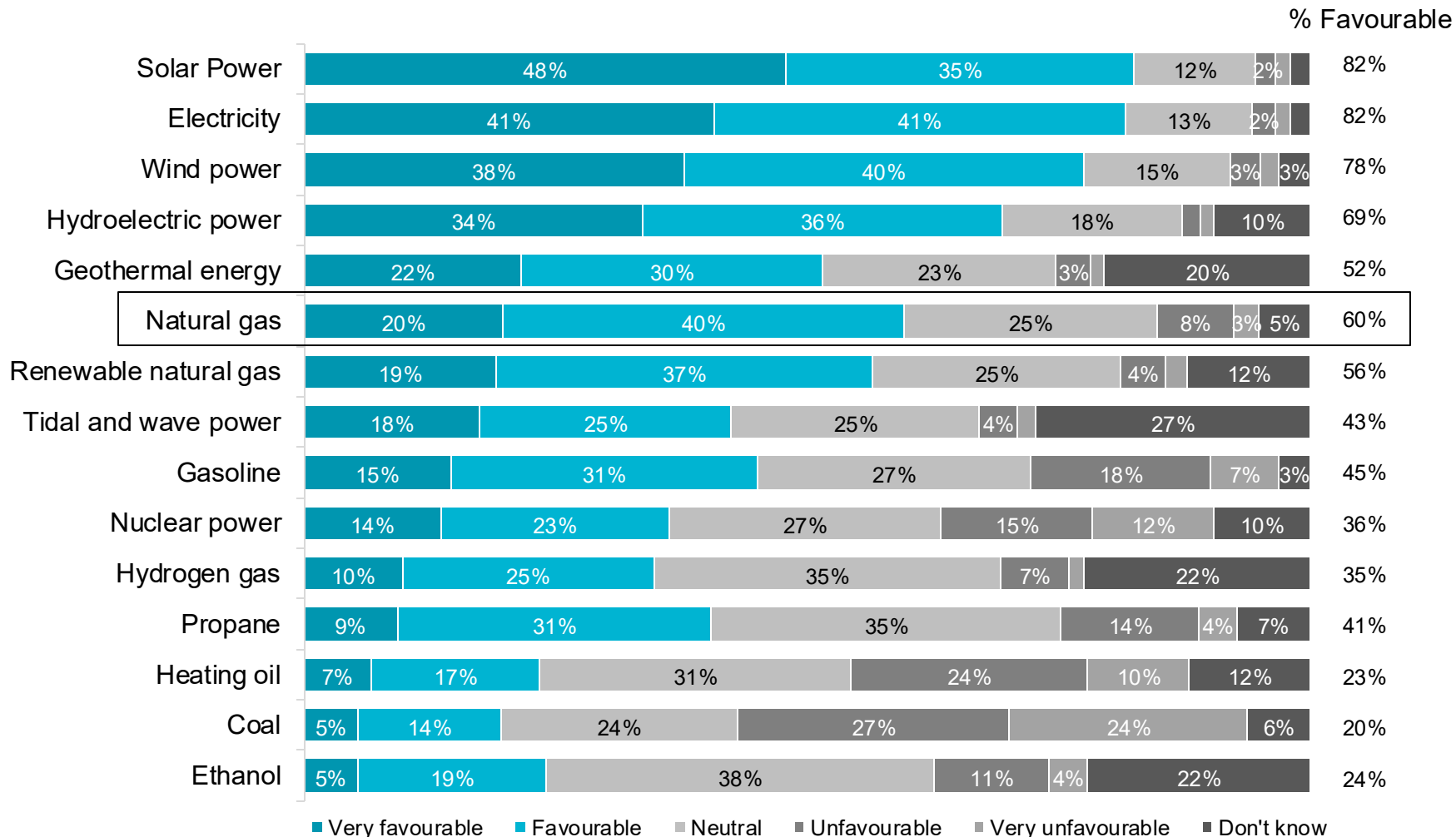
% Familiar





# Favourability Ratings of the Energy Types

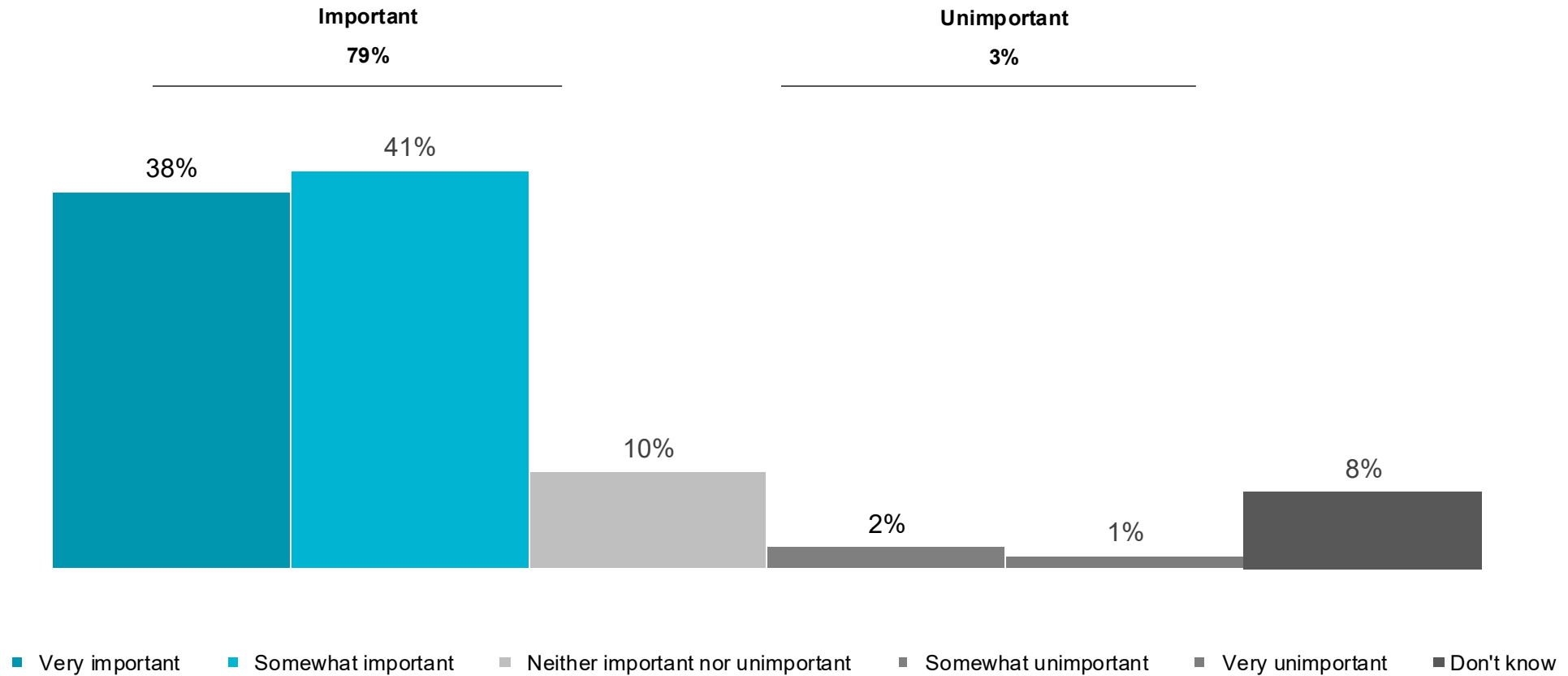
Q: Thinking about energy resources used in everyday life, what is your overall opinion of the following energy types?





# Importance of Natural Gas in the Canadian Economy

Q: In your opinion, how important is the role of natural gas in Canada's economy?



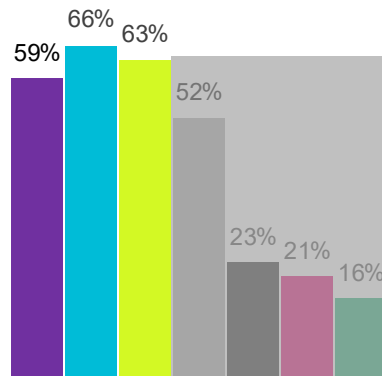




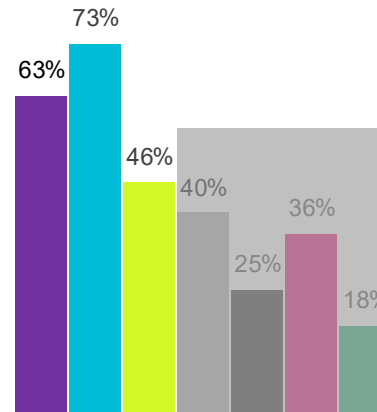
# Energy Sources – Evaluation of Affordability, Reliability and Sustainability

Q: In your opinion, which of the following energy sources are the most affordable/reliable/environmentally sustainable?

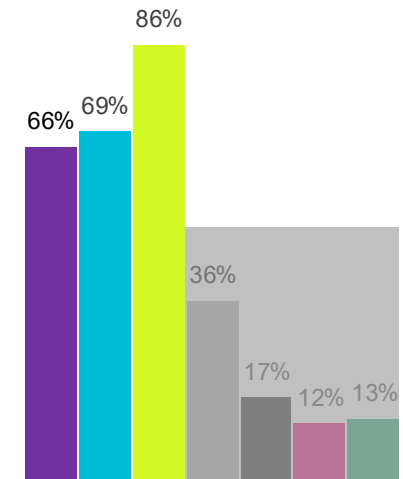
**Affordable**



**Reliable**



**Environmentally Sustainable**



■ Natural gas

■ Electricity

■ Solar power

■ Burning wood

■ Propane

■ Gasoline

■ Heating oil

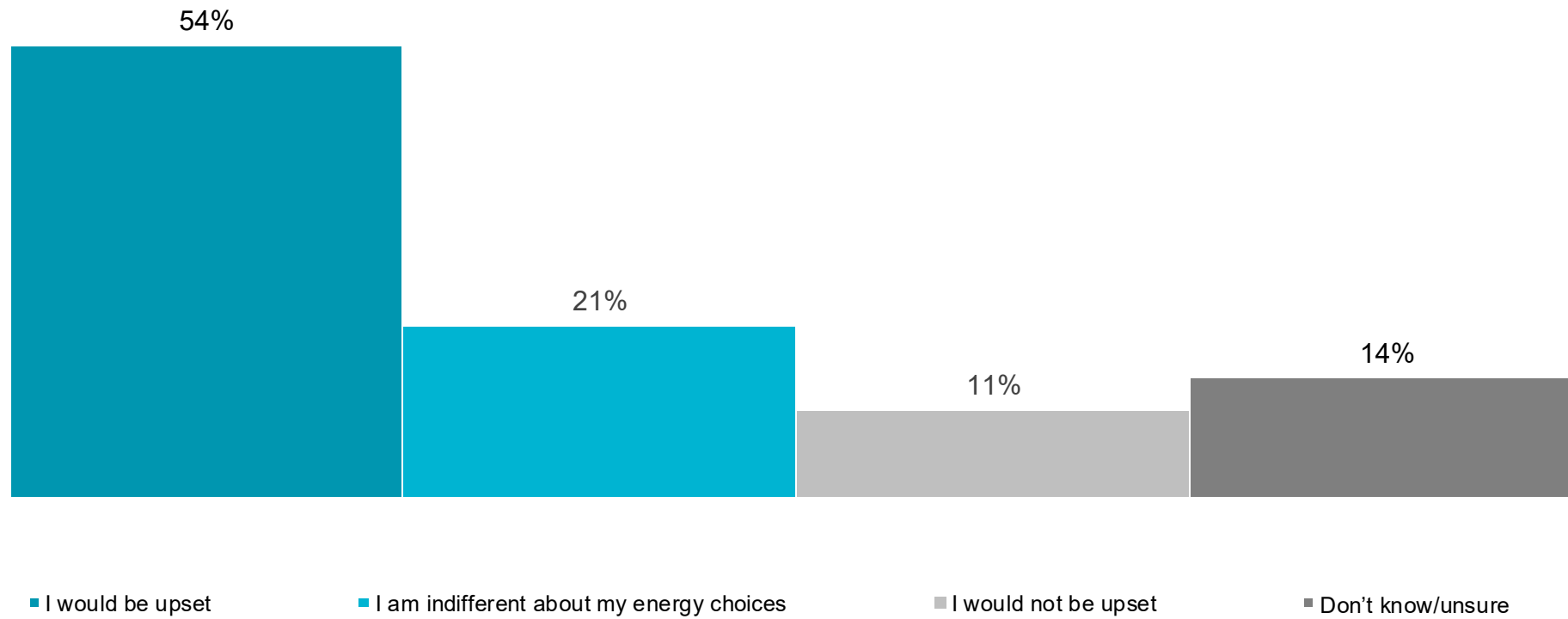
# Public Opinion on Banning Natural Gas





## Canadian Sentiment on Energy Source Choice

Q: If you were no longer able to choose your energy sources, how would you feel about the lack of choice?





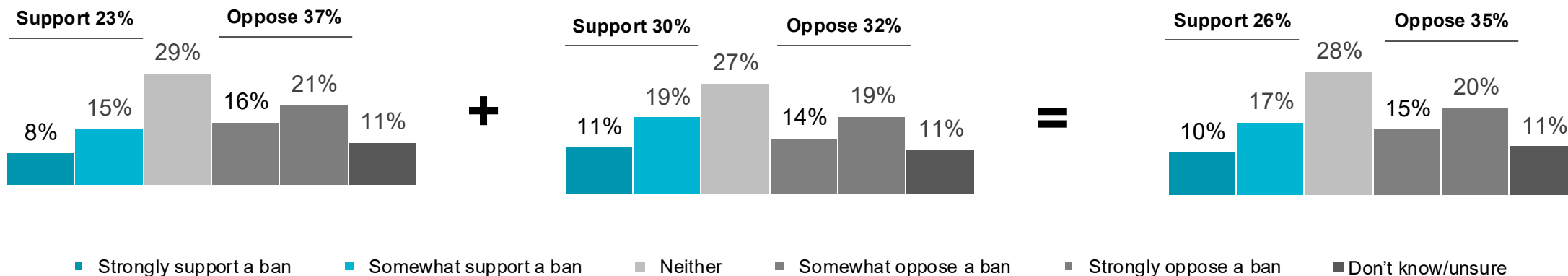
# Stance on Banning Natural Gas

Q: If this were to occur in your neighbourhood, which of the following best describes your stance on the matter?

Some municipalities are considering or are actively moving towards banning natural gas in residential neighbourhoods.

Some municipalities are considering or are actively moving towards banning natural gas in residential neighbourhoods citing health concerns and its environmental impact.

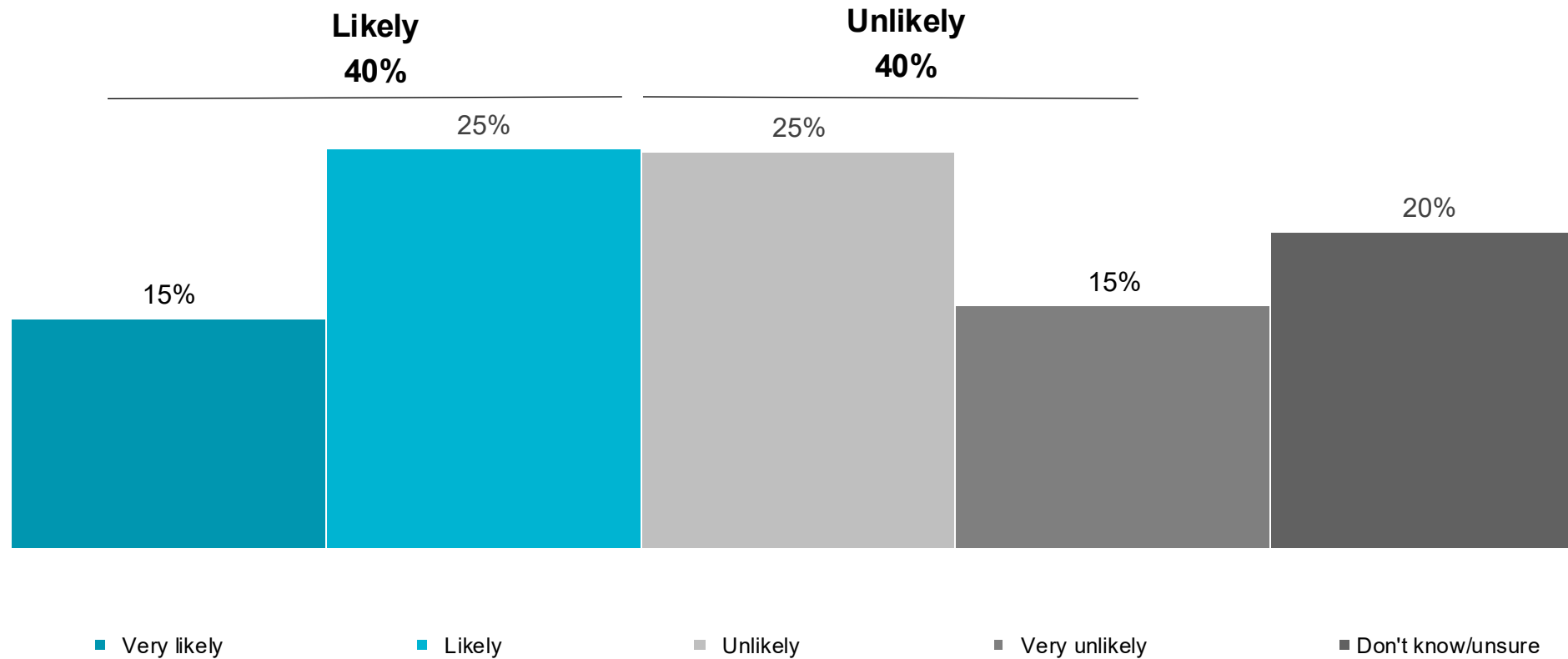
Combined





# Likelihood of Advocacy Against the Ban on Natural Gas

Q: How likely are you to advocate against the ban on natural gas specifically?

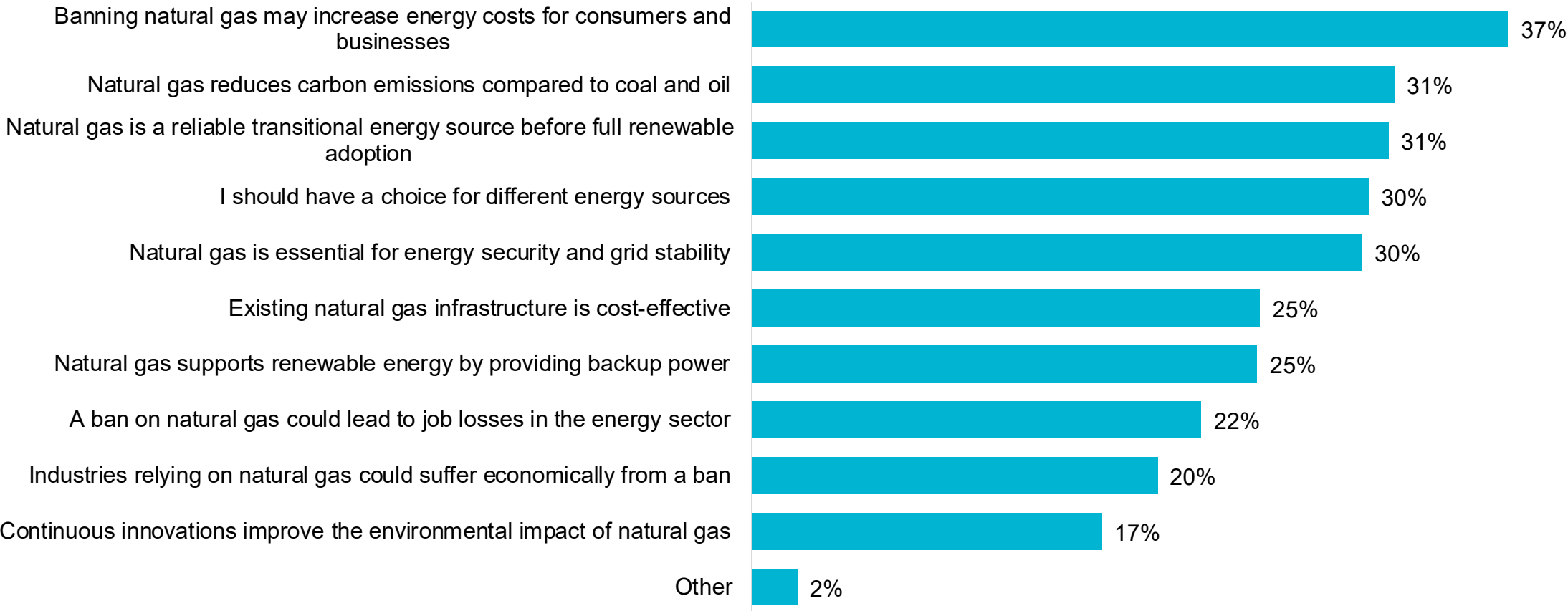




# Motivations to Advocating Against the Ban

Of those who are *likely* to advocate against the ban:

Q: What are your top three reasons for advocating against the issue of banning natural gas?

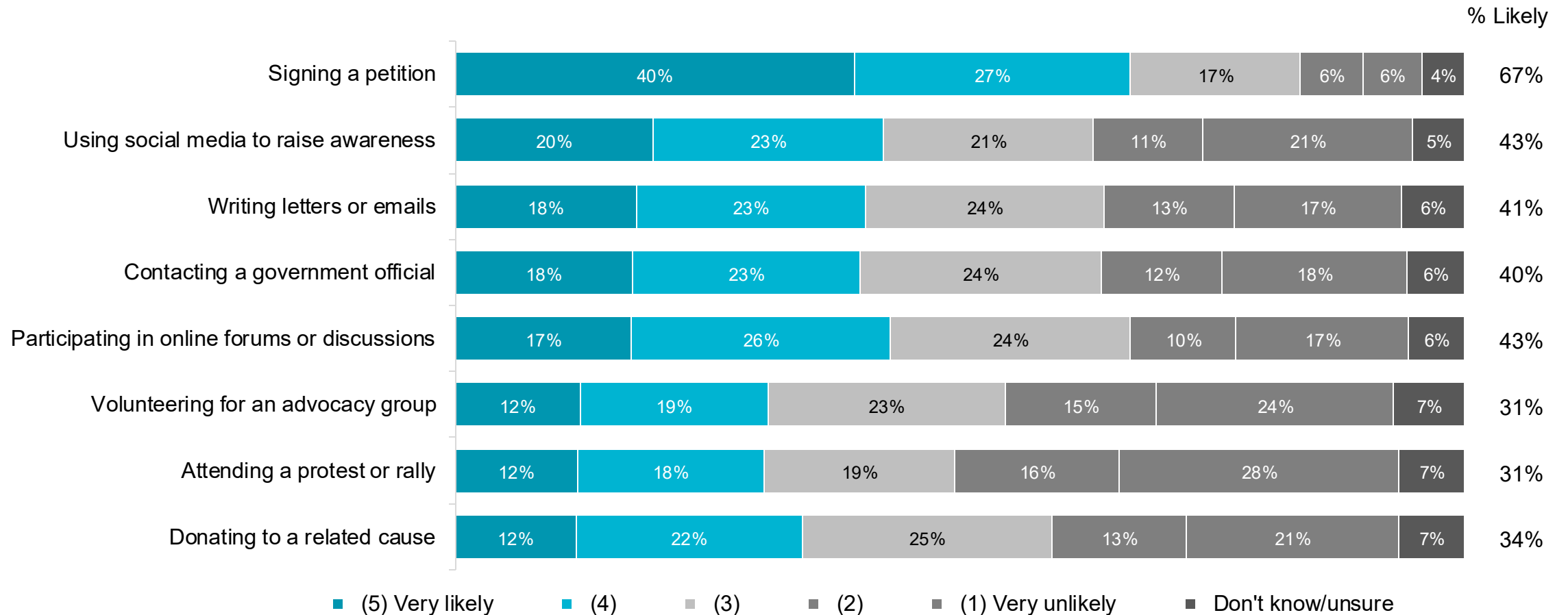




## Preferred Advocacy Methods Among Canadians

Of those who are *likely* to advocate against the ban:

Q: How likely are you to engage in the following advocacy methods?

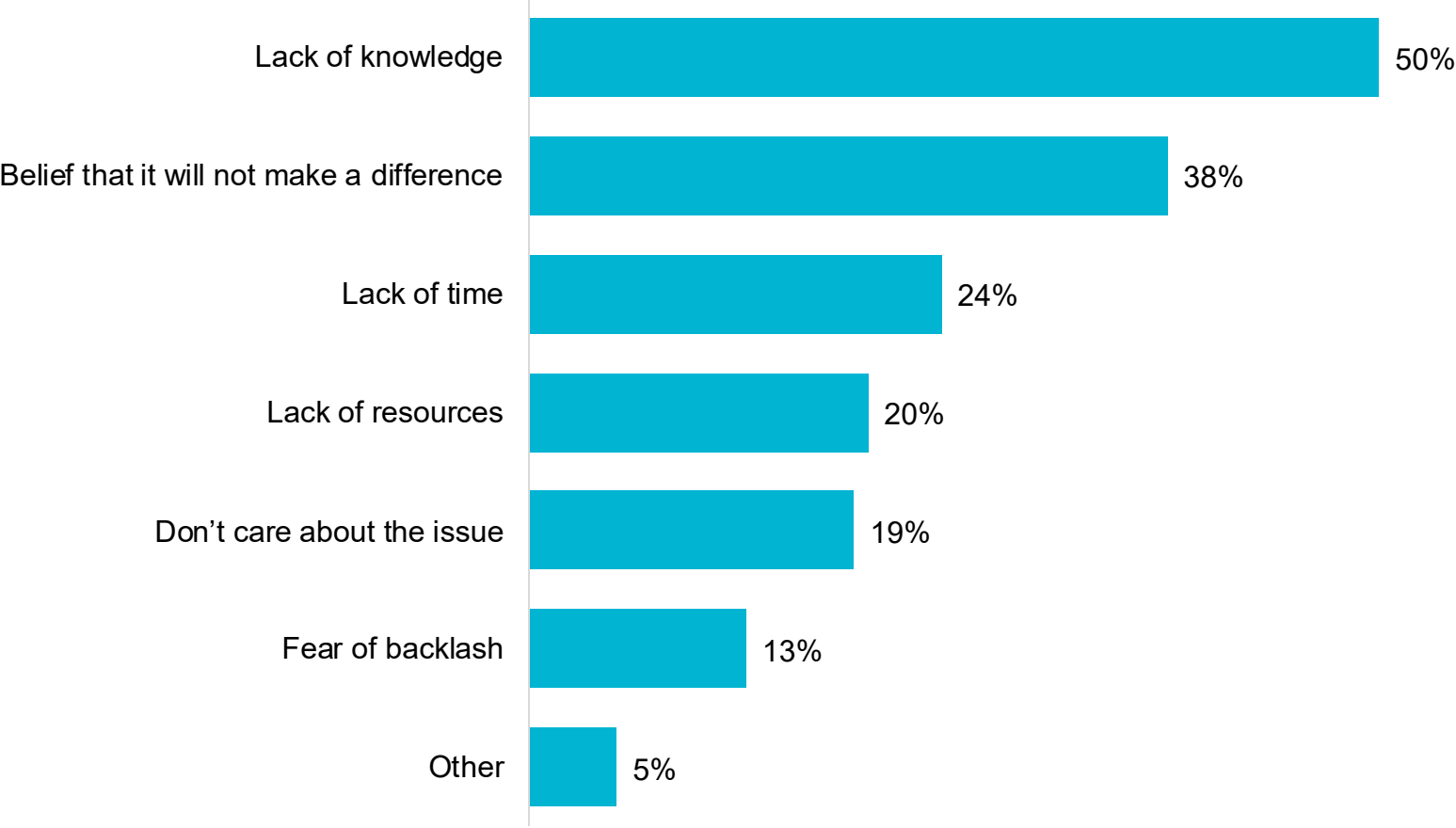




# Barriers to Advocating Against the Ban

Of those who are *unlikely* to advocate against the ban:

Q: What barriers prevent you from advocating against issues?





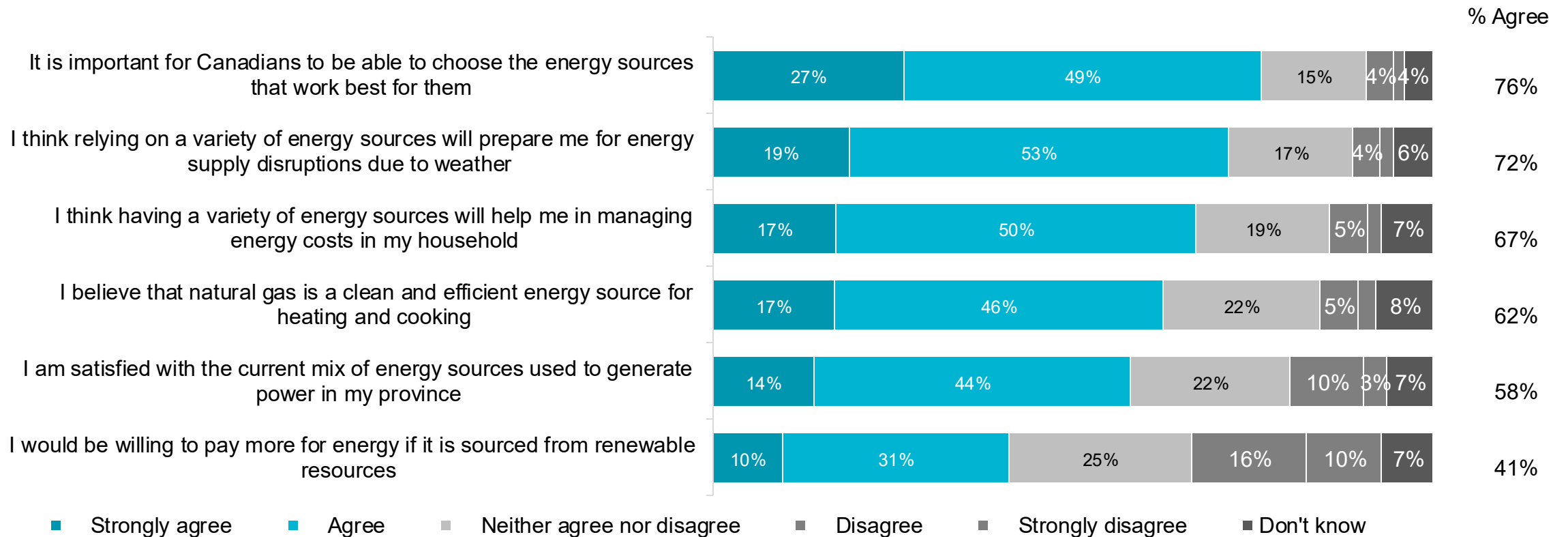
# Energy Perspectives





# Canadian Perspectives on Energy Resilience

**Q: Please indicate your level of agreement with the following statements:**



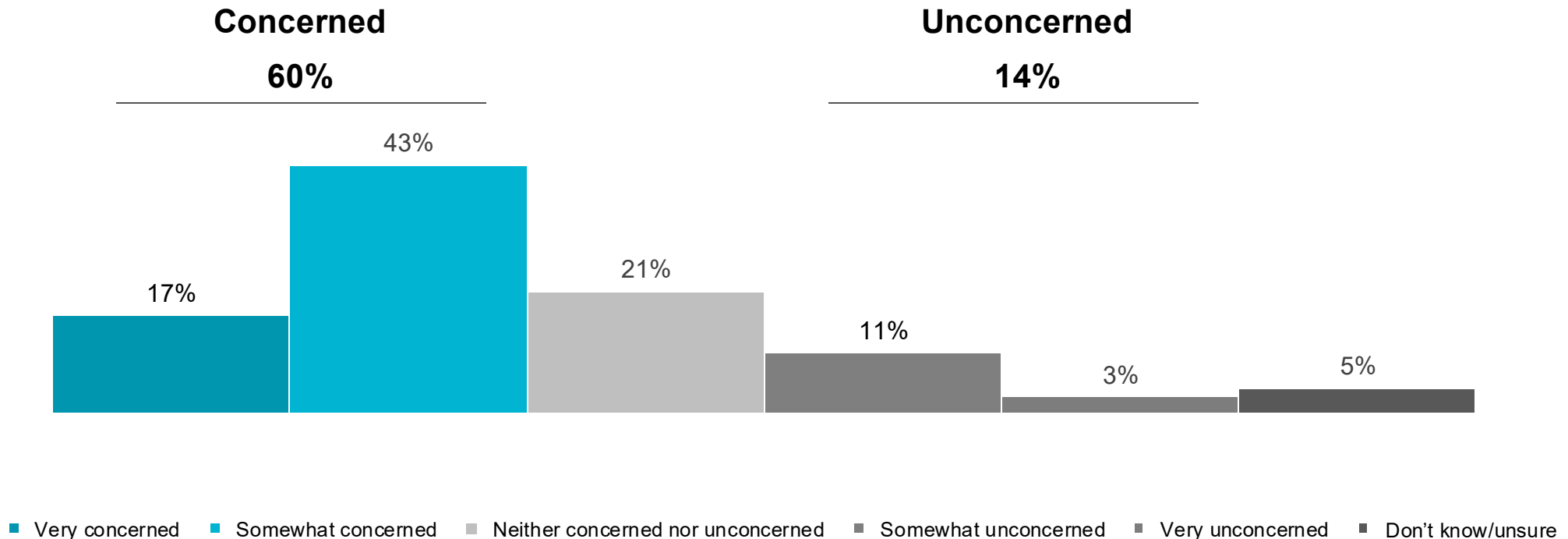


# Energy Security Concerns in Canada

## Participants were asked:

Energy security refers to ensuring a stable and reliable supply of energy sources to meet the needs of a region. This involves having adequate reserves, diversified energy sources, and infrastructure resilience to withstand disruptions such as natural disasters or geopolitical conflicts.

How concerned are you about the future of energy security in Canada?



# Perceptions Around Net-Zero Goals





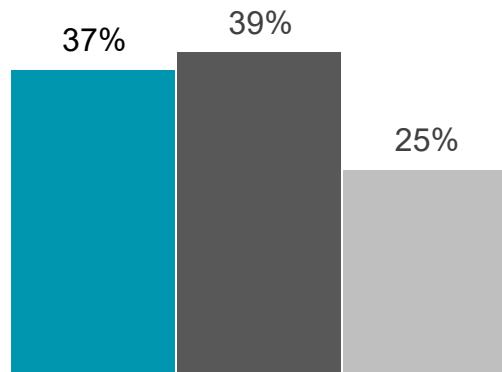
## Achieving Net-Zero Goals: Feasibility and Attainability

### Participants were asked:

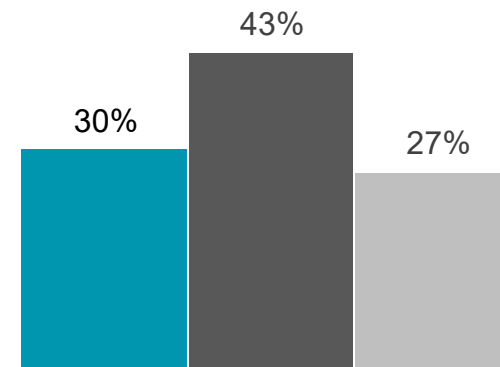
"Net-zero" goals mean that we want to balance out the greenhouse gases we put into the air with the ones we take out. It is like keeping our emissions in check, so we don't make climate change worse. Canada is committed to achieving the "Net-zero" goals by 2050.

### Do you think...

Overall, Canada's net-zero goals are achievable



Canada's net-zero goals are financially attainable

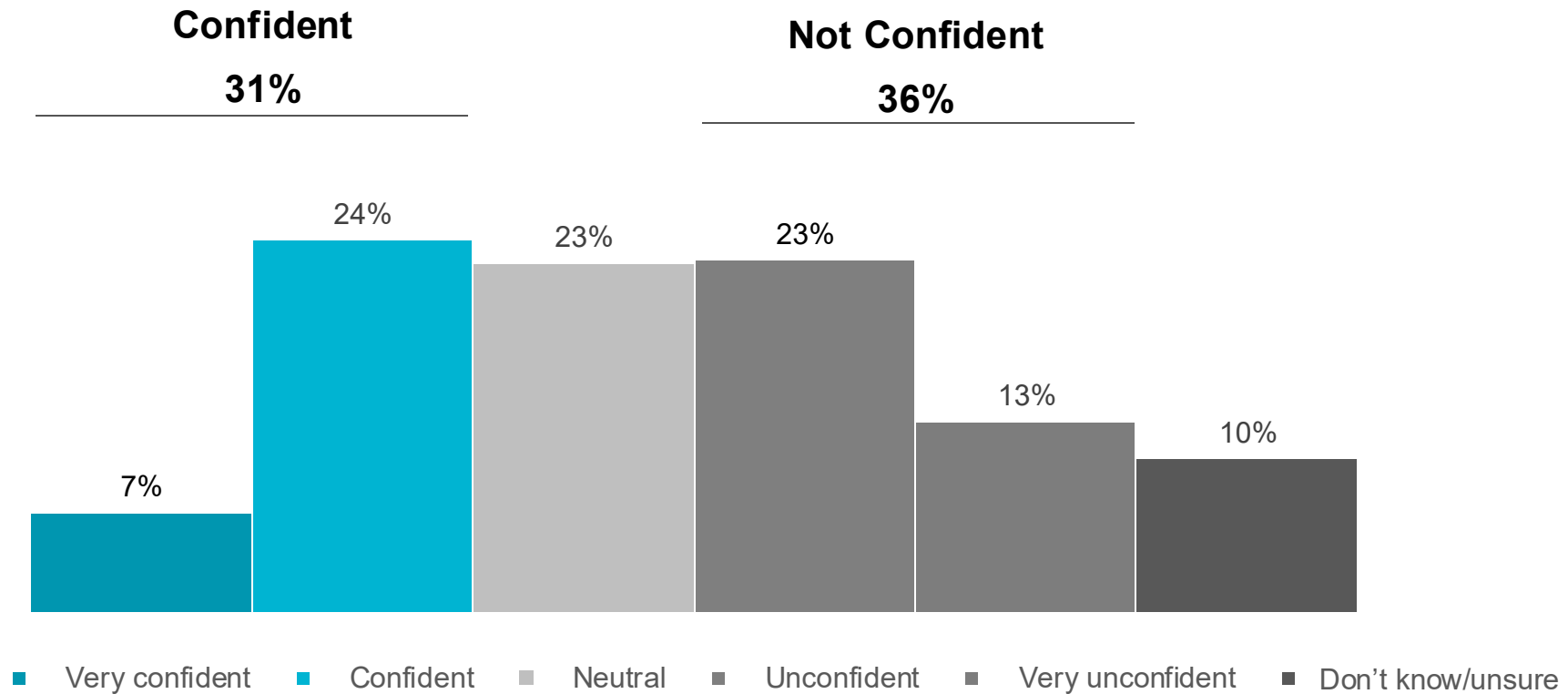


■ Yes ■ No ■ Don't know/unsure



## Confidence on Achieving Energy Supply and Zero Emissions in Canada

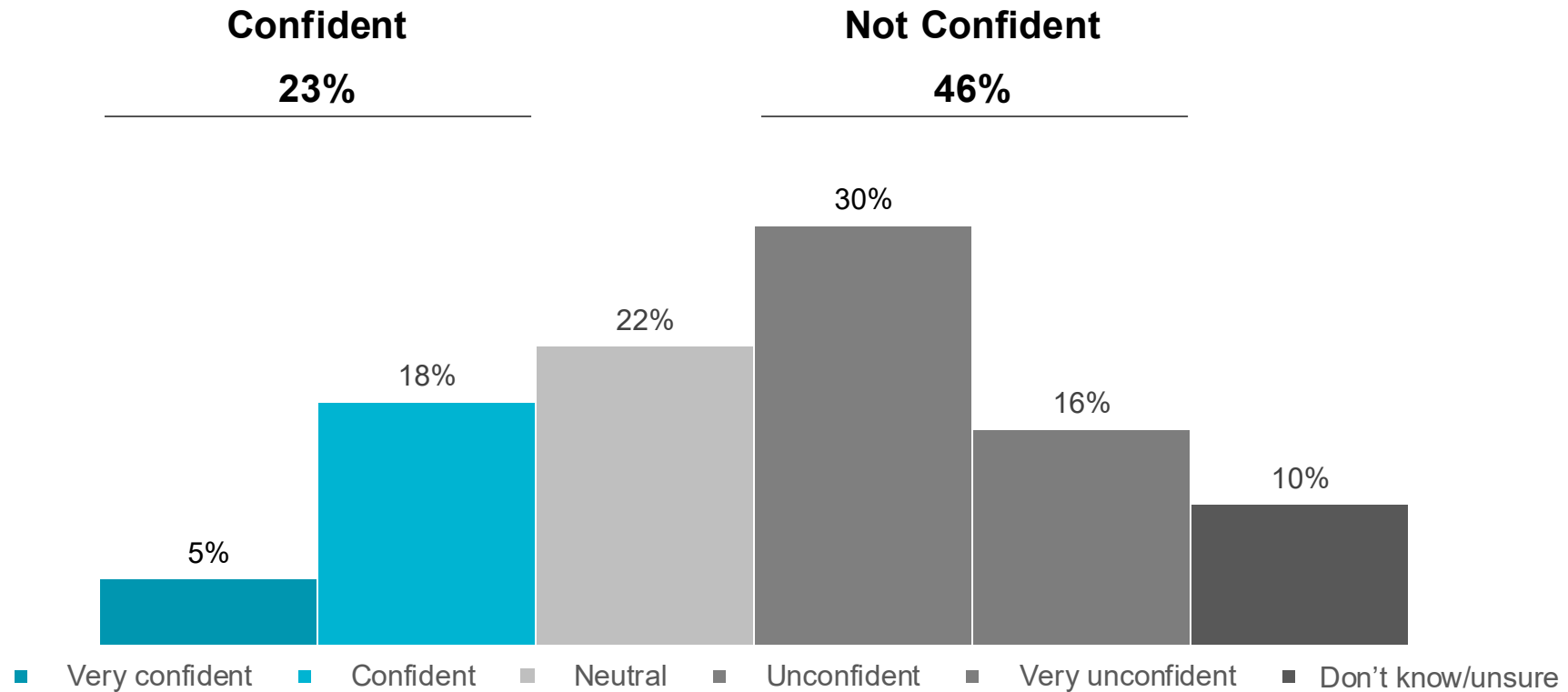
Q: How confident are you that Canada will have a reliable energy supply if we prioritize zero-emission energy sources





## Confidence on Achieving Energy Supply and Zero Emissions in Canada

Q: How confident are you that Canada can achieve zero emissions with the technology and infrastructure we have now



# Expectations From the Government

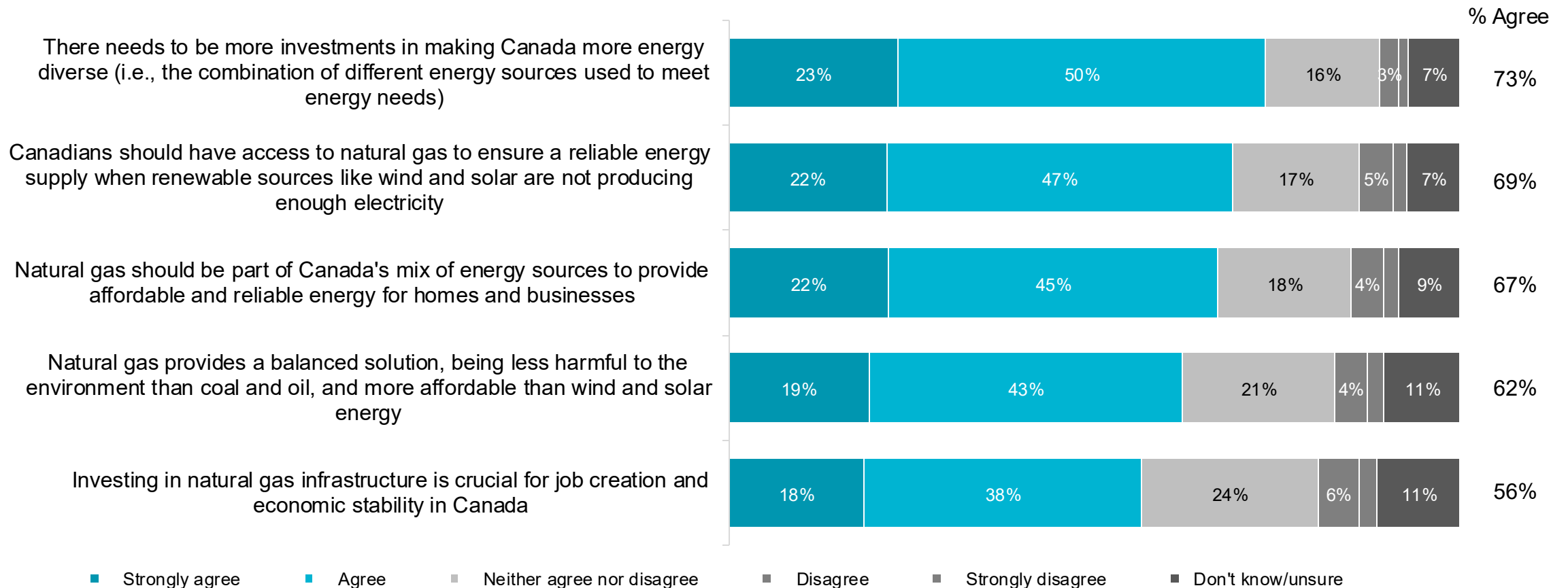






# Canadian Perspectives on Energy Investments and Infrastructure

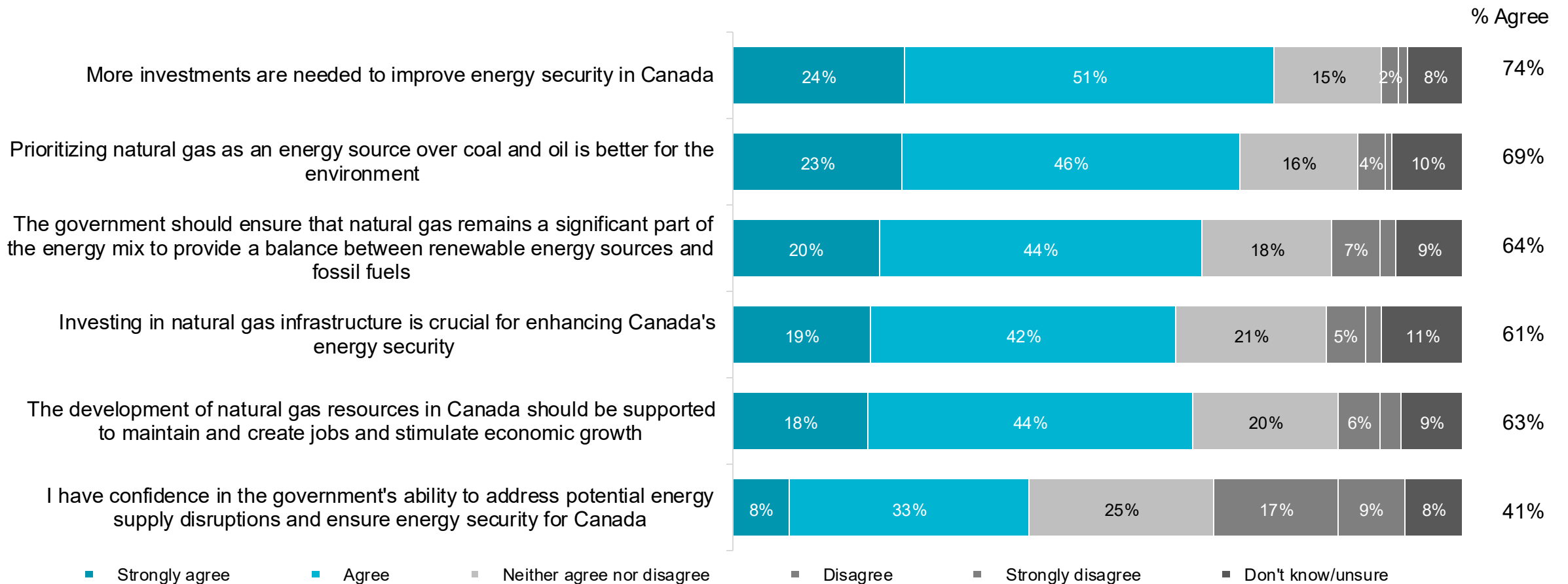
**Q: How much do you agree with the following statements:**





## Public Perceptions and Expectations on Energy Sources and Investments

**Q: How much do you agree with the following statements:**



# Conclusions





## Conclusions

Canadians predominately use electricity (88%), however natural gas (43%) is their second choice.

82% of Canadians are aware of natural gas

60% have a favourable opinion of natural gas

Canadians rated natural gas within the **top three energy source** choices when it comes to affordability, reliability and environmental sustainability.

Canadians highly value choice when it comes to energy, with 54% wanting a choice in their energy source

Overall, 26% support a ban from municipalities

While 35% oppose a ban from municipalities

40% are **likely** to advocate against a ban. An equal 40% is **unlikely** to advocate against a ban.

Canadians expect the government to make investments to improve energy security in Canadas

# We make, change and mobilize public opinion



## strategy and tactics that drive winning arguments

We effectively represent the interests of corporations, not-for-profits, and industry associations to achieve results with governments around the world. No longer is a winning outcome based on 'whom you know' or the 'magic meeting'. It is about contributing to the policy process, presenting a case that is supported by authentic community voices, and getting in front of the right decision-makers and opinion leaders to make that case effective.



## better data leads to winning insights

We design and execute deliberative research programs that inform and provide insight into clients' most critical decisions. Following a disciplined set of principles, our seasoned professionals have experience in numerous qualitative and quantitative techniques for effectively measuring opinions among key audiences and using research to identify when and how opinions can be leveraged and mobilized for their greatest impact.



## market and crisis communications that win the day

We develop strategies for clients using a deliberative or adversarial model, allowing them to control the narrative and win public opinion battles. Whether to gain market share or establish a positive reputation we ensure clients are well prepared and well-advised. How you tell your story and where you tell it is often the difference in successfully changing opinion, defending your interests, obtaining approval, and mobilizing stakeholders.



## mobilize influencers to build winning engagement

Mobilization campaigns are premised on the fact that for elected officials, the single most influential voice in shaping their decisions is that of their local voters and community leaders. The benefits of mobilization go beyond a one-off campaign. The long-term goal of mobilization is to increase engagement, provide greater value for members, and increase the share of voice and influence outcomes.

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#### Calgary

639 5 Ave SW, McDougall Building, Suite 2516 Calgary, Alberta  
T2P 0M9  
+1 780-638-2145  
contactus@crestviewstrategy.com

#### Edmonton

10665 Jasper Avenue, Suite 1447 Edmonton, Alberta  
T5J 3S9  
+1 780-638-2145  
contactus@crestviewstrategy.com

#### Halifax

17 Hollis Street  
Halifax, NS  
B3J 3M8  
+1 902-440-1551  
robyn.mcisaac@crestviewstrategy.com

#### Kigali, Rwanda

Fifth Floor  
Kigali Heights Building  
Kigali, Rwanda  
harry.burns@crestviewstrategy.com

#### London, UK

35-36 Great Marlborough Street  
London  
W1F 7JF  
nick.varley@crestviewstrategy.com

#### Ottawa

222 Queen Street, Suite 1100  
Ottawa, Ontario  
K1P 5V9  
+1 613-232-3192  
contactus@crestviewstrategy.com

#### Sydney

Level 22, 2 Market Street  
Sydney NSW 2000  
Australia  
+61 421-888-858  
matthew.doman@crestviewstrategy.com

#### Toronto

80 Richmond Street W, Suite 400  
Toronto, Ontario  
M5H 2A4  
+1 416-645-2912  
contactus@crestviewstrategy.com

#### Vancouver

666 Burrard Street  
Suite 500  
Vancouver, BC  
V6C3P6  
contactus@crestviewstrategy.com

#### Washington D.C.

1725 I St. NW  
Suite 300  
Washington, DC 20006  
+1 202-239-0848  
washington.dc@crestviewstrategy.com