Oil in Québec

April 2017
Methodology
Online survey conducted with Québec’s general population across all regions in the province.

Leger, The Research Intelligence Group was commissioned by the Montreal Economic Institute (MEI) to conduct an online study with the general population of Québec. In total, 1 016 Quebecers aged 18 or over were surveyed between April 17 to April 19, 2017. Respondents came from all regions across Québec.

Weighting and Margin of Error
Final survey data were weighted based on the 2011 census according to age, gender, mother tongue, region, and level of education in order to guarantee a representative sample of the Quebec population.

For comparative purposes, a random sample of 1 016 respondents would yield a margin of error of +/- 3.1%, 19 times out of 20.

Online Survey
Survey respondents were selected randomly from LegerWeb’s Internet panel, which includes 400,000 Canadian households, and according to a stratification process applied to invitation lists, which ensures optimal respondent representativeness. Panelists were recruited randomly from Leger’s telephone surveys. Several quality control measures were implemented to ensure that Leger’s surveys with Internet panelists are representative and reliable. Leger has obtained Gold Seal Certification from the Marketing Research and Intelligence Association, the highest reliability rating conferred by the association.

How to Read Tables
In the following tables, data in bold and green indicate a significantly higher proportion than that of other respondents. Conversely, data in bold and red indicate a significantly lower proportion than that of other respondents. When possible, results were compared to previous studies.
Detailed Results
Q: Currently, Québec must import (from Western Canada or abroad) all of the oil it consumes. In your opinion, is it preferable for Québec to exploit its own oil resources or for it to continue importing 100% of the oil necessary for consumption from outside Québec?
Base: all respondents (n=1 016)

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Gender</th>
<th>Age</th>
<th>Total Feb. 16</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Male</td>
<td>Female</td>
<td></td>
</tr>
<tr>
<td>Exploit its own oil resources</td>
<td>56%</td>
<td>62%</td>
<td>51%</td>
<td>54%</td>
</tr>
<tr>
<td>Continue to import 100% of the oil from outside Québec</td>
<td>20%</td>
<td>26%</td>
<td>14%</td>
<td>23%</td>
</tr>
<tr>
<td>I don't know</td>
<td>20%</td>
<td>9%</td>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>I prefer not to answer</td>
<td>4%</td>
<td>3%</td>
<td>4%</td>
<td>2%</td>
</tr>
</tbody>
</table>
Exploit Québec Oil Resources Instead of Importing Oil from Outside the Province, by Voting Intentions

Q: Currently, Québec must import (from Western Canada or abroad) all of the oil it consumes. In your opinion, is it preferable for Québec to exploit its own oil resources or for it to continue importing 100% of the oil necessary for consumption from outside Québec?

Base: all respondents (n=1,016)

<table>
<thead>
<tr>
<th>Option</th>
<th>Total</th>
<th>LPQ</th>
<th>PQ</th>
<th>CAQ</th>
<th>QS</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exploit its own oil resources</td>
<td>56%</td>
<td>54%</td>
<td>59%</td>
<td>71%</td>
<td>41%</td>
<td>63%</td>
</tr>
<tr>
<td>Continue to import 100% of the oil from outside Québec</td>
<td>20%</td>
<td>22%</td>
<td>23%</td>
<td>16%</td>
<td>33%</td>
<td>15%</td>
</tr>
<tr>
<td>I don’t know</td>
<td>20%</td>
<td>23%</td>
<td>14%</td>
<td>12%</td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td>I prefer not to answer</td>
<td>4%</td>
<td>0%</td>
<td>4%</td>
<td>1%</td>
<td>3%</td>
<td>8%</td>
</tr>
</tbody>
</table>
Q : In your opinion, is it preferable for the oil imported from outside Québec to come from...

Base : all respondents (n=1 016)

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Gender</th>
<th>Age</th>
<th>Total Feb. 16</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Male</td>
<td>Female</td>
<td>18-24</td>
</tr>
<tr>
<td>...Western Canada ?</td>
<td>65%</td>
<td>70%</td>
<td>61%</td>
<td>50%</td>
</tr>
<tr>
<td>NET Other countries</td>
<td>13%</td>
<td>17%</td>
<td>9%</td>
<td>22%</td>
</tr>
<tr>
<td>...Mexico ?</td>
<td>5%</td>
<td>7%</td>
<td>4%</td>
<td>9%</td>
</tr>
<tr>
<td>...Saudi Arabia ?</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>...Algeria ?</td>
<td>3%</td>
<td>4%</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>...another country ?</td>
<td>2%</td>
<td>3%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>I don't know / I prefer not to answer</td>
<td>22%</td>
<td>13%</td>
<td>30%</td>
<td>29%</td>
</tr>
</tbody>
</table>
Q : In your opinion, is it preferable for the oil imported from outside Québec to come from...
Base : all respondents (n=1 016)

<table>
<thead>
<tr>
<th>Option</th>
<th>Total</th>
<th>LPQ</th>
<th>PQ</th>
<th>CAQ</th>
<th>QS</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>...Western Canada ?</td>
<td>65%</td>
<td>75%</td>
<td>66%</td>
<td>84%</td>
<td>49%</td>
<td>81%</td>
</tr>
<tr>
<td>NET Other countries</td>
<td>13%</td>
<td>9%</td>
<td>18%</td>
<td>6%</td>
<td>23%</td>
<td>5%</td>
</tr>
<tr>
<td>...Mexico ?</td>
<td>5%</td>
<td>3%</td>
<td>7%</td>
<td>1%</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td>...Saudi Arabia ?</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
<td>4%</td>
<td>0%</td>
</tr>
<tr>
<td>...Algeria ?</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
<td>1%</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td>...another country ?</td>
<td>2%</td>
<td>0%</td>
<td>5%</td>
<td>1%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>I don't know / I prefer not to answer</td>
<td>22%</td>
<td>16%</td>
<td>16%</td>
<td>11%</td>
<td>28%</td>
<td>14%</td>
</tr>
</tbody>
</table>
Pipeline: the Safest Means to Transport Oil

Q: In your opinion, which of the following means is the safest to transport oil?
Base: all respondents (n=1,016)

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Gender</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th>Total Fem. 16</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Male</td>
<td>Female</td>
<td>18-24</td>
<td>25-34</td>
<td>35-44</td>
<td>45-54</td>
<td>55-64</td>
</tr>
<tr>
<td>Pipeline</td>
<td>41%</td>
<td>53%</td>
<td>30%</td>
<td>33%</td>
<td>37%</td>
<td>30%</td>
<td>36%</td>
<td>53%</td>
</tr>
<tr>
<td>Tank truck</td>
<td>14%</td>
<td>12%</td>
<td>16%</td>
<td>21%</td>
<td>17%</td>
<td>15%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Train</td>
<td>12%</td>
<td>12%</td>
<td>13%</td>
<td>20%</td>
<td>20%</td>
<td>15%</td>
<td>12%</td>
<td>5%</td>
</tr>
<tr>
<td>Tank ship</td>
<td>11%</td>
<td>11%</td>
<td>12%</td>
<td>5%</td>
<td>8%</td>
<td>13%</td>
<td>11%</td>
<td>17%</td>
</tr>
<tr>
<td>I don't know / I prefer not to answer</td>
<td>21%</td>
<td>12%</td>
<td>29%</td>
<td>22%</td>
<td>18%</td>
<td>27%</td>
<td>23%</td>
<td>16%</td>
</tr>
</tbody>
</table>
Q: In your opinion, which of the following means is the safest to transport oil?

Base: all respondents (n=1 016)

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>LPQ</th>
<th>PQ</th>
<th>CAQ</th>
<th>QS</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pipeline</td>
<td>41%</td>
<td>54%</td>
<td>30%</td>
<td>55%</td>
<td>19%</td>
<td>40%</td>
</tr>
<tr>
<td>Tank truck</td>
<td>14%</td>
<td>10%</td>
<td>14%</td>
<td>11%</td>
<td>35%</td>
<td>18%</td>
</tr>
<tr>
<td>Train</td>
<td>12%</td>
<td>9%</td>
<td>16%</td>
<td>13%</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Tank ship</td>
<td>11%</td>
<td>9%</td>
<td>17%</td>
<td>11%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>I don't know / I prefer not to answer</td>
<td>21%</td>
<td>18%</td>
<td>23%</td>
<td>11%</td>
<td>22%</td>
<td>23%</td>
</tr>
</tbody>
</table>
## Profile of Respondents

<table>
<thead>
<tr>
<th>Gender</th>
<th>Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>49%</td>
</tr>
<tr>
<td>Female</td>
<td>51%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>11%</td>
</tr>
<tr>
<td>25-34</td>
<td>16%</td>
</tr>
<tr>
<td>35-44</td>
<td>16%</td>
</tr>
<tr>
<td>45-54</td>
<td>20%</td>
</tr>
<tr>
<td>55-64</td>
<td>17%</td>
</tr>
<tr>
<td>65+</td>
<td>20%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region</th>
<th>Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Montreal CMA</td>
<td>48%</td>
</tr>
<tr>
<td>Québec CMA</td>
<td>10%</td>
</tr>
<tr>
<td>Rest of Québec</td>
<td>42%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Language</th>
<th>Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>French</td>
<td>78%</td>
</tr>
<tr>
<td>English and others</td>
<td>22%</td>
</tr>
</tbody>
</table>