

MEETING CANADA'S ENERGY NEEDS

Montreal Economic Institute

Research Report

December 2019

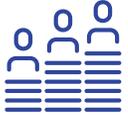
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SUMMARY

1. After healthcare, the economy and jobs is one of the biggest concerns Canadians say is facing them.
2. While half of Canadians rank climate change in their top three list of concerns, almost two-thirds say they are not able/willing to pay anything to help protect the environment. Of those who are able/willing to pay, they are able to spare less than \$40 per month extra.
3. Almost half of Quebecers think their province should develop its own oil resources over importing all of the oil it needs, but a large number of Quebecers also don't know. Given that this change cannot happen overnight, there is a significant amount of support among Quebecers to continue importing oil from Western Canada.
4. Half of Canadians believe that pipeline is the safest means of transporting oil. However, a quarter of Canadians say they don't know the safest means.
5. A majority of Canadians believe that Canadian companies should be subject to a carbon tax, even if the extra cost might put them at a disadvantage.

Methodology



These are findings of an Ipsos poll conducted on behalf of the Montreal Economic Institute.



A sample of 1,003 Canadians aged 18 years and over was interviewed on the Ipsos I-Say Panel from November 22-25, 2019.



Weighting was employed to ensure that the sample's composition reflects the overall population according to latest census information.



The precision of online polls is measured using a credibility interval. In this case, the results are accurate to within +/- 3.5 percentage points, 19 times out of 20, of what the results would have been had all Canadians been polled.



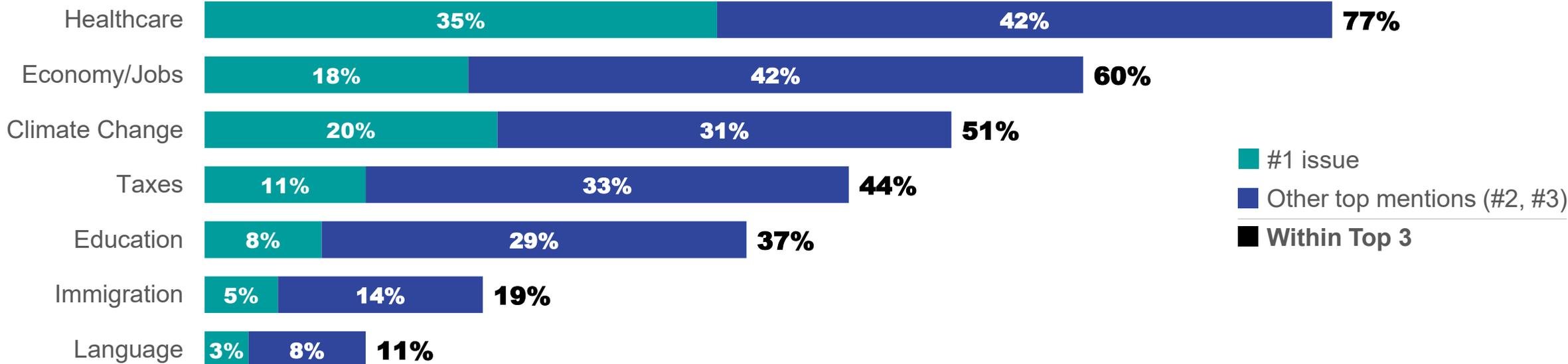
Respondents from Quebec were deliberately oversampled (n=400) to give more substance to questions that were only asked in that province. However, this oversample is weighted down when reporting statistics at the national level.

Most Important Issues Facing Canadians

Healthcare remains an important issue facing Canadians, with over three-quarters (77%) naming it among their top three concerns. Over a third say that it is their number one concern, a proportion that drastically rises among those aged 55+ (53%).

The economy and jobs are also on the minds of many Canadians; 60% name it among their top three and 18% say it's their top concern. Those in Alberta are significantly more likely than those elsewhere to cite the economy or jobs as their top concern (34%).

Climate change is also a major issue, with half (51%) placing it in their top three and 2 in 10 (20%) citing it as their main concern. This proportion is slightly higher in Quebec (29%).

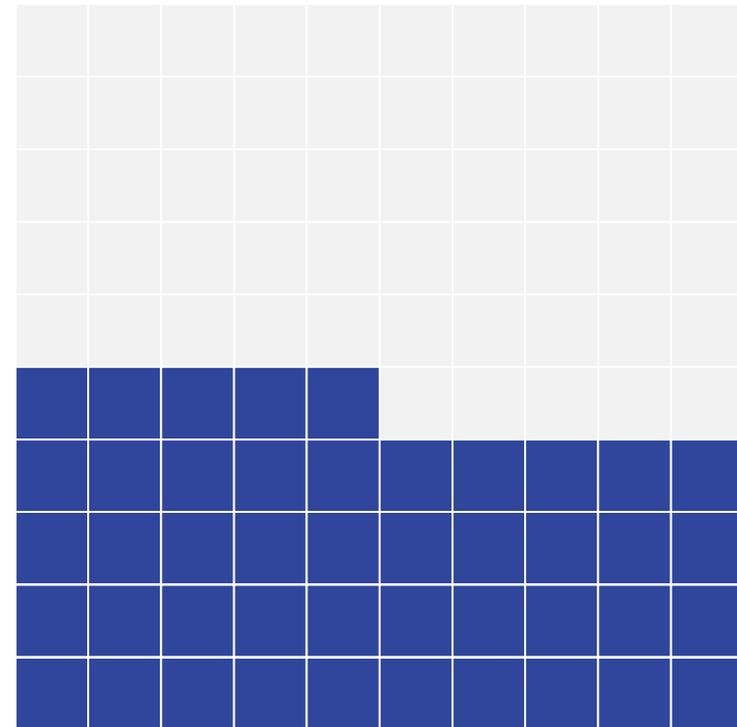


Q1. What are the most important issues facing you today? Please rank in order of priority.
Base: All respondents (n=1003)

Continue to Import Oil or Develop Own Supply?



Attitudes on Quebec's Oil Supply



45%

Develop own supply

26%

Continue to import oil

28%

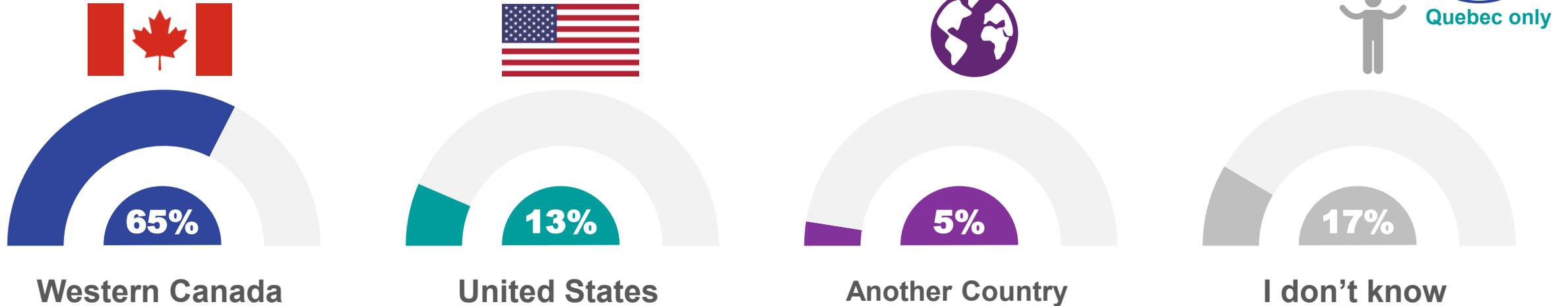
Don't Know

Almost half (45%) of Quebecers believe that their province should develop its own oil resources in lieu of importing all of the oil it consumes. Over a quarter (26%) think that the province should continue importing oil.

However, it is also important to note that 28% of Quebecers don't know, with women more likely to respond that they don't know (43%).

Q2. Currently, Quebec must import (from Western Canada or from abroad) all of the oil it consumes. In your opinion, should Quebec develop its own oil resources or continue to import 100% of the oil it needs?
Base: Quebec respondents (n=400)

Where to Import Oil From?

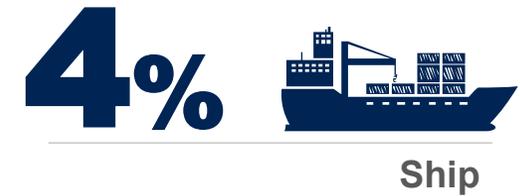


Given that Quebec will be unable to immediately start producing its own oil, the province must continue importing. When asked from which places they would like to import their oil, a large majority (65%) of Quebecers say they would like to keep their energy dollars within the country and import from Western Canada.

A much smaller proportion (13%) would prefer to import from the United States and just 5% of Quebecers would like to see the imported oil come from another country.

Q3. In your opinion, is it preferable for the oil imported from outside Quebec to come from...
Base: Quebec respondents (n=400)

Safest Means of Transporting Oil



Half (50%) of Canadians believe that pipelines are the safest means of transporting oil, with large amounts of support among those in Alberta (72%) and British Columbia (62%). Furthermore, older Canadians (aged 55+) are more likely than other age groups to believe pipeline is safest (68%).

Trains are seen as the second-safest means of transporting oil (11%), followed by tanker trucks (7%), then ships (4%). However, over a quarter (27%) of Canadians say they don't know the safest means of transporting oil.

Quebecers are more likely than other Canadians to believe that tanker trucks (13%) and ships (9%) are the safest means of transporting oil.

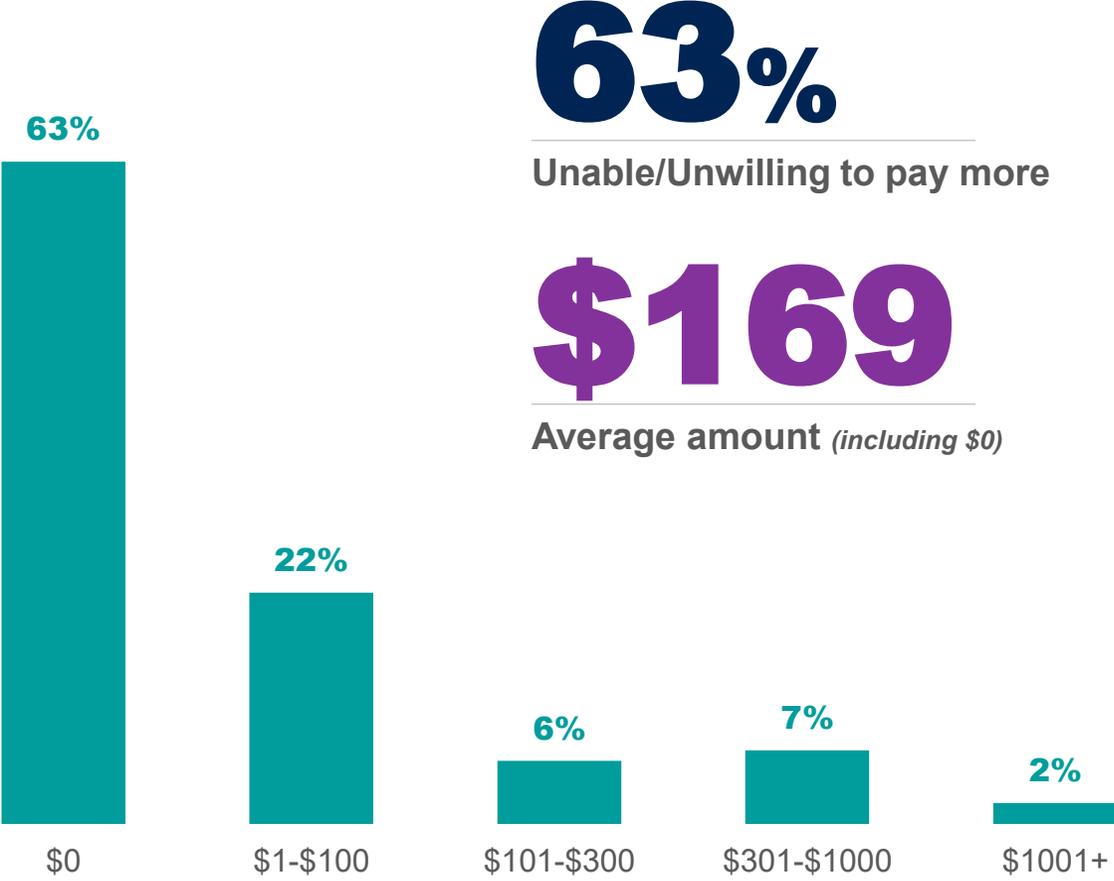
Q4. In your opinion, which of the following is the safest means of transporting oil?
Base: All respondents (n= 1003)

Would You Pay More to Help Fight Climate Change?

Even though climate change is the top issue for 20% of Canadians and over half name it in their top three issues, almost two-thirds (63%) are either unable or unwilling to pay more in taxes to help fight climate change.

However, those who say climate change is their #1 issue are willing to put their money where their mouth is. On average, they are willing to pay \$371 extra per year to do their part for the environment.

Including those who cannot or are unwilling to pay more, Canadians are willing to pay an extra \$169 per year to fight climate change. On average, men say they are willing to pay more than women do (\$260 v. \$81) and Canadians aged 18-34 say they are willing to pay the most of any age group (\$285). Regionally speaking, those in SK/MB and Quebec report being willing to pay the most to reduce their greenhouse gas emissions (\$266 and \$207, respectively). Those in BC and Alberta are willing to pay the least, at just \$87.



Q5. Are you prepared to pay more in taxes to help fight climate change? If yes, how much more are you prepared to pay each year to reduce your greenhouse gas emissions?
Base: All respondents (n=1003)

Should Canadian Companies Be Subject to a Carbon Tax?

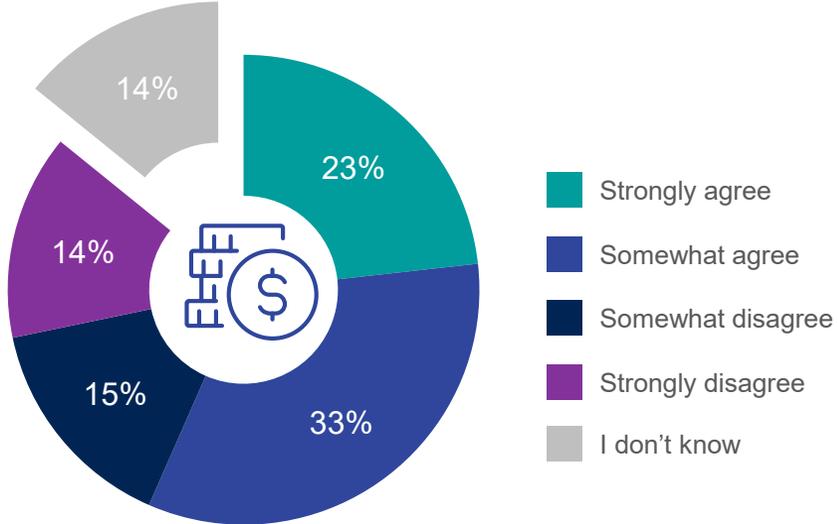
When asked if they agreed that Canadian companies should be subject to a carbon tax, even if it meant that they could be at a disadvantage compared to foreign companies based in jurisdictions without a carbon tax, Canadians largely agreed (57%) that they should. Among those who say climate change is their #1 issue, this proportion rises to 71%.

While almost 3 in 10 (29%) disagree with the carbon tax on Canadian companies, those who say the economy and jobs are their #1 issue tend to disagree to a larger extent (36%). In addition, Albertans disagree with a carbon tax on Canadian companies in larger numbers (44%).

57% 29%

Agree

Disagree



Carbon Tax on Canadian Companies

Q6. As of April 1, 2019, federal carbon pricing came into effect in some provinces and will come into effect in Alberta on January 1, 2020. As a result, Canadian companies now must pay for their carbon emissions and could be at a disadvantage when compared to foreign competitors based in countries without a carbon tax. To what extent do you agree or disagree that Canadian companies should be subject to a carbon tax?
Base: All respondents (n=1003)

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