

MEETING CANADA'S ENERGY NEEDS (2020)

Montreal Economic Institute

Research Report

September 2020



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SUMMARY

- The economy and jobs are the second-most important issue for Canadians. Health care remains the most important issue, unsurprising given the current pandemic.
- More than a third of Canadians say that climate change is one of their top three issues. However, when asked how much they would be prepared to pay in extra taxes to do their part to protect the environment, 61% say that they are either unable or unwilling to pay more. Even those who are able to pay more are only willing to spare an extra \$40 per month, at most.
- Half of Quebecers believe that their province should develop its own oil resources, a five-point increase from last year. The proportion of Quebecers who believe that the province should continue importing oil to fulfil its energy needs remains stable at 26%. A quarter say they don't know which is the better solution. If Quebec must continue to import oil into the near future, 7 out of 10 Quebecers would prefer that the oil come from Western Canada over other countries.
- Half of Canadians believe that pipelines are the safest means of transporting oil, although this proportion has fallen among those living in British Columbia. A quarter say they don't know what the safest means would be.
- Almost two-thirds of Canadians believe that it is more difficult to get a pipeline project approved in Canada than in other oil-producing countries.

Methodology



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



A sample of 1,150 Canadians aged 18 years and over was interviewed on the Ipsos I-Say Panel from August 20-23, 2020.



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



The precision of Ipsos 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 Canadian adults 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.



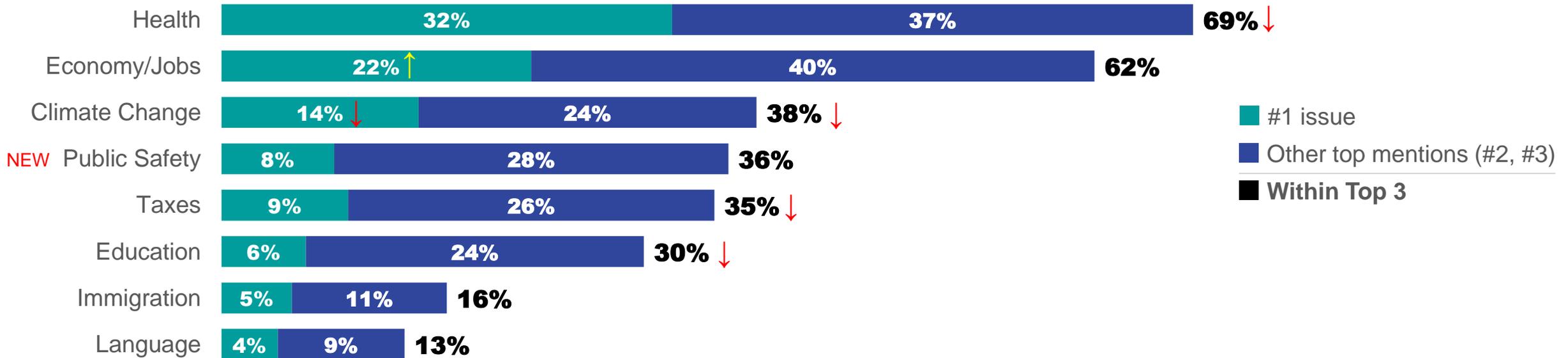
Some questions in this survey have also been asked in a previous wave, carried out among 1,003 Canadians aged 18 years and over from November 22-25, 2019. Where appropriate, this report will make reference to this previous wave when discussing the results.

Most Important Issues Facing Canadians

Approximately 7 in 10 Canadians (69%, -8 vs. 2019) mention health care as one of their top-three concerns. This proportion includes a third (32%, -3) who say that it is their number one concern, rising to 48% among those aged 55+ (-5).

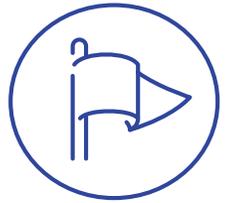
The addition of a new answer option this year, combined with the current pandemic, means that certain issues are down from last year -- notably climate change (-13), taxes (-9), and education (-7). However, the economy and jobs remain firmly on the minds of many Canadians; 62% (+2) name it among their top three and 22% say it is their main concern (+4). Those in Alberta are significantly more likely than those elsewhere to cite the economy and jobs as their top concern (30%, -4).

One in seven (14%) respondents say that climate change is their main issue, down 6 points from last year.



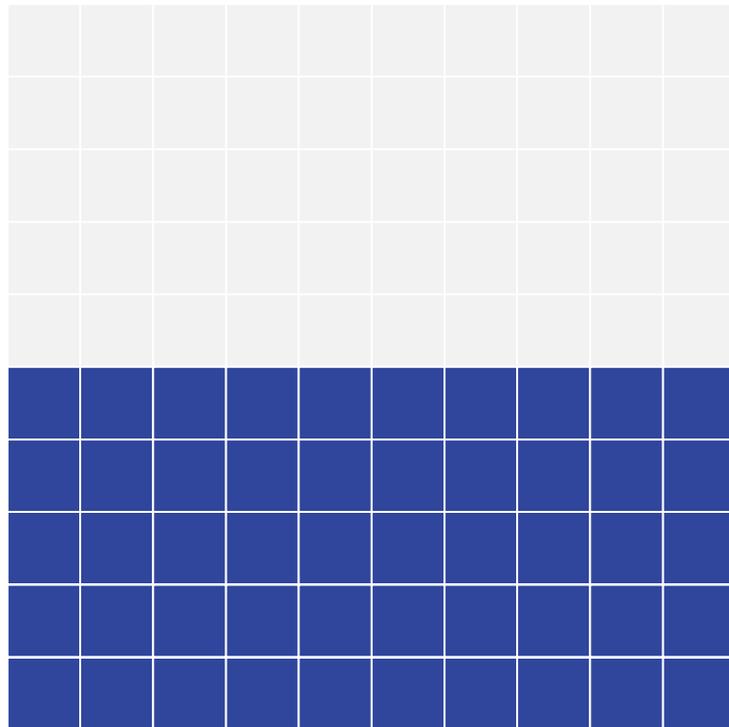
Q1. What are the most important issues facing you today? Please rank in order of priority.
 Base: All respondents 2020 (n=1,150) and 2019 (n=1,003)

Continue to Import Oil or Develop Own Supply?



Quebec only

Attitudes on Quebec's Oil Supply



50%

Develop own supply

2019: 45%

26%

Continue to import oil

2019: 26%

24%

Don't Know

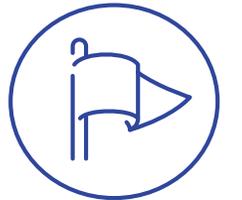
2019: 28%

Half (50%) of Quebecers believe that their province should develop its own oil resources instead of importing all the oil it consumes. This is an increase of 5 points from last year. Similar to last year, over a quarter (26%) still think that the province should continue importing oil. This proportion is significantly higher among men (32%).

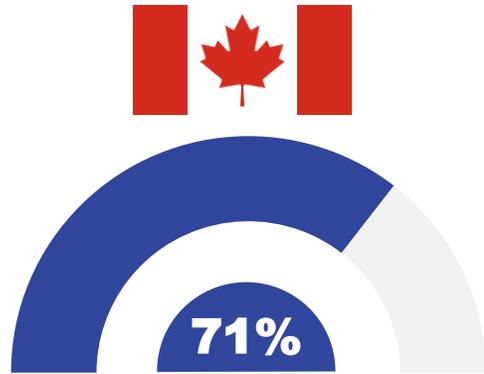
The remaining Quebec respondents (24%) don't know the best way for the province to meet its energy demands. Women are more likely to say they don't know (32%).

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 2020 (n=400) and 2019 (n=400)

Where to Import Oil From?

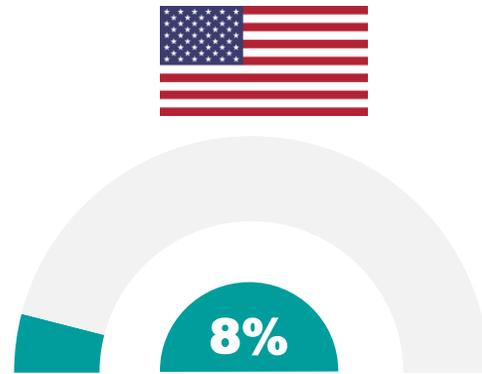


Quebec only



Western Canada

2019: 65%



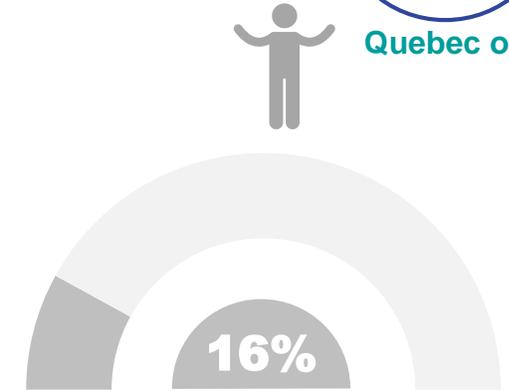
United States

2019: 13%



Another Country

2019: 5%



I don't know

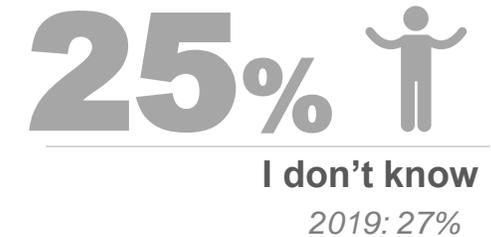
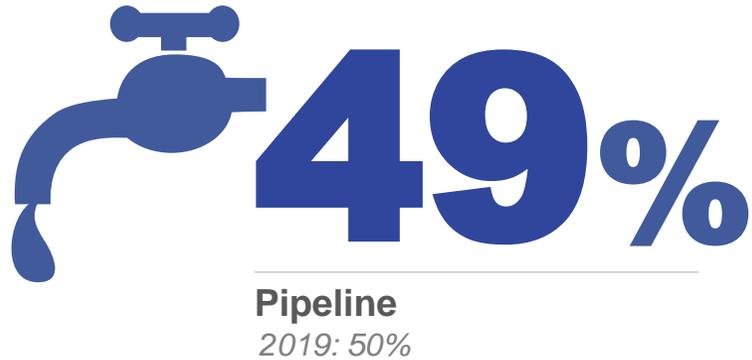
2019: 17%

Compared to last year, there has been an increase in the proportion of Quebecers who prefer that the province's oil come from domestic sources, most likely a reflection of the current geopolitical situation. 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 (71%, +6) of Quebecers say they would like to import their oil from Western Canada.

Understandably, an increase in one area must mean a decrease in others. Only 8% of Quebecers would prefer that the province import its oil from the United States (-5). Another 6% (+1) say they would like for it to come from another country.

Q3. In your opinion, is it preferable for the oil imported from outside Quebec to come from...
Base: Quebec respondents 2020 (n=400) and 2019 (n=400)

Safest Means of Transporting Oil



Canadians' beliefs as to the safest means of transporting oil remain stable from last year. Half (49%, -1) of Canadians believe that pipelines are the safest means of transporting oil. Those in Alberta (77%, +5) are the most positive about this option, while those in Quebec (41%) are the least favourable towards it. Compared to last year, residents of British Columbia are significantly less likely to believe that pipelines are the safest means of transporting oil (62%, -15). The anti-pipeline protests that took place in this province earlier in the year could help explain this result. Men (57%, +1) and Canadians aged 55+ (64%, -4) are more likely than other age groups to believe pipelines are the safest.

Similar to last year, trains are seen as the second-safest means of transporting oil (13%, +2), followed by tanker trucks (8%, +1), and ships (6%, +2). A quarter (25%) of Canadians say they don't know the safest means of transporting oil.

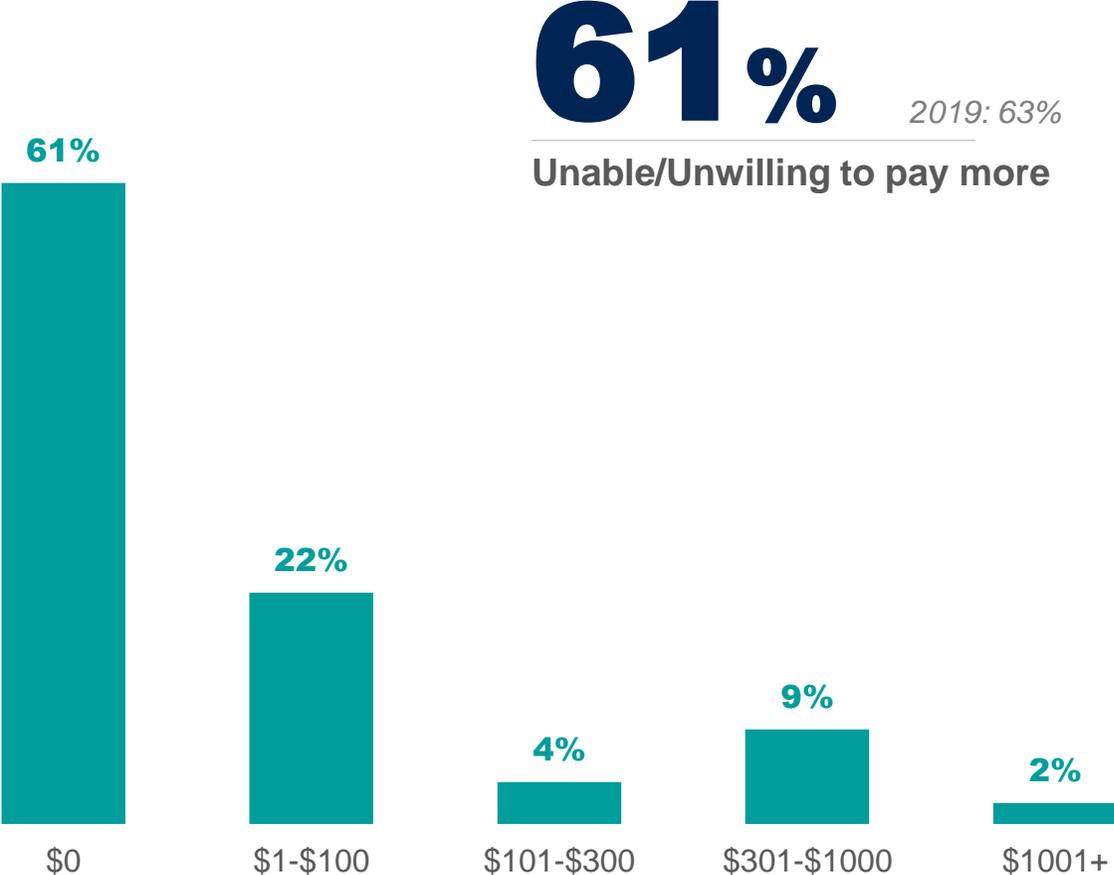
Q4. In your opinion, which of the following is the safest means of transporting oil?
Base: All respondents 2020 (n=1,150) and 2019 (n=1,003)

Would You Pay More to Help Fight Climate Change?

Even though climate change is the top issue for 14% of Canadians and a third place it in their list of top three issues, six in ten (61%, -2) are either unable or unwilling to pay more in taxes to help fight climate change.

Among those who are able and willing to pay more in taxes to reduce their greenhouse gas emissions, less than half (44%, +4) would be able to pay more than \$100 in extra taxes per year. There are no significant differences between regions on this measure.

Those who say climate change is their top issue are willing to put their money where their mouth is and pay a little more to help protect the environment. On average, they are willing to pay \$392 extra per year, but this only represents the equivalent of another \$33 per month.



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 2020 (n=1,150) and 2019 (n=1,003). Please note that outlier values have been excluded from the calculation of the mean.

Is It More Difficult to Get a Pipeline Approved in Canada?

Almost two-thirds (63%) of Canadians agree that it is more difficult to get a pipeline project approved in Canada than it is in other oil-producing countries. This includes 27% who “strongly agree” and 36% who “somewhat agree” with this statement.

The proportion of Canadians who agree (includes “strongly agree” and “somewhat agree”) reaches 81% in Alberta, 73% in British Columbia, and 73% among those who mention the economy and jobs as their top issue.

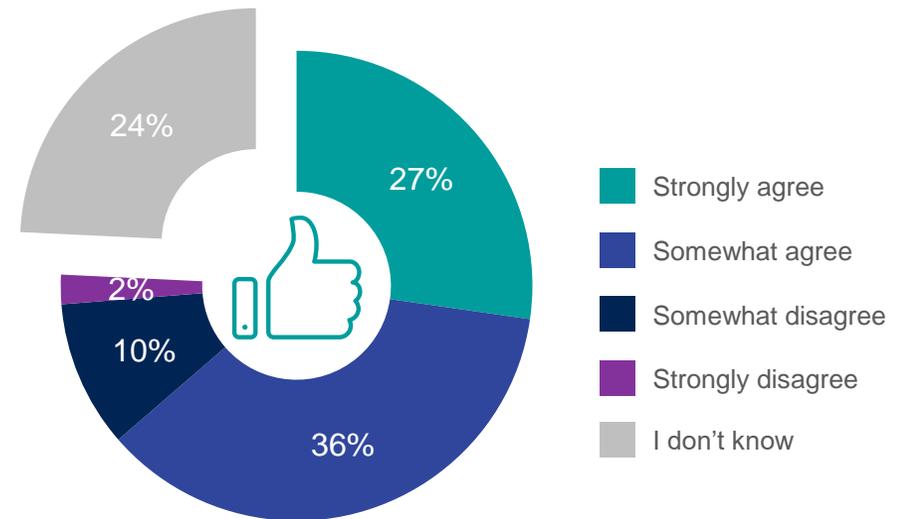
Just over one in ten (13%) respondents disagrees with the idea that it is more difficult to get a pipeline project approved in Canada than it is elsewhere. A quarter (24%) say they don’t know.

63%

Agree

13%

Disagree



Difficulty in Obtaining Pipeline Approval in Canada

Q8. To what extent do you agree or disagree with the following statement: “It is more difficult to get a pipeline project approved in Canada than in other oil-producing countries?”
Base: All respondents (n=1,150)

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