

MEETING CANADA'S ENERGY NEEDS (2021)

Montreal Economic Institute

Research Report

November 2021

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SUMMARY

- While **health care** tends to be the most-important issue for Canadians, it has taken on even greater importance in the pandemic. Also related to the current context, the **economy and jobs** are the second-most important issue, with slightly more Canadians saying that it is top of mind.
- Though in third place, **significantly more Canadians say that climate change is a top-three issue for them**. However, this **increased attention does not necessarily translate into being able and willing to pay more** to help fight climate change. In fact, when asked how much they would be prepared to pay in extra taxes to do their part to protect the environment, **65% say that they are either unable or unwilling to pay more**, an increase over last year. Even those who are able to pay more are only willing to spare an extra \$30 per month on average (a decrease since last year).
- **The proportion of Quebecers who believe that the province should continue importing oil to fulfil its energy needs has increased over last year**. As such, just over four in ten Quebecers believe that their province should develop its own oil resources, a seven-point decrease. In addition, while Quebecers would largely prefer that the oil their province imports come from Western Canada, this proportion has remained stable since last year.
- **Carbon capture technologies are popular in Quebec**, but while few are explicitly against them, **a significant proportion are still undecided** on the matter.
- In contrast with the large amount of attention paid to the current COP26 summit, **only a quarter of Canadians are confident that this conference will help find concrete solutions to climate change**. However, **Quebecers are the most optimistic** in this regard (36%).



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 October 29 to November 2, 2021.



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.



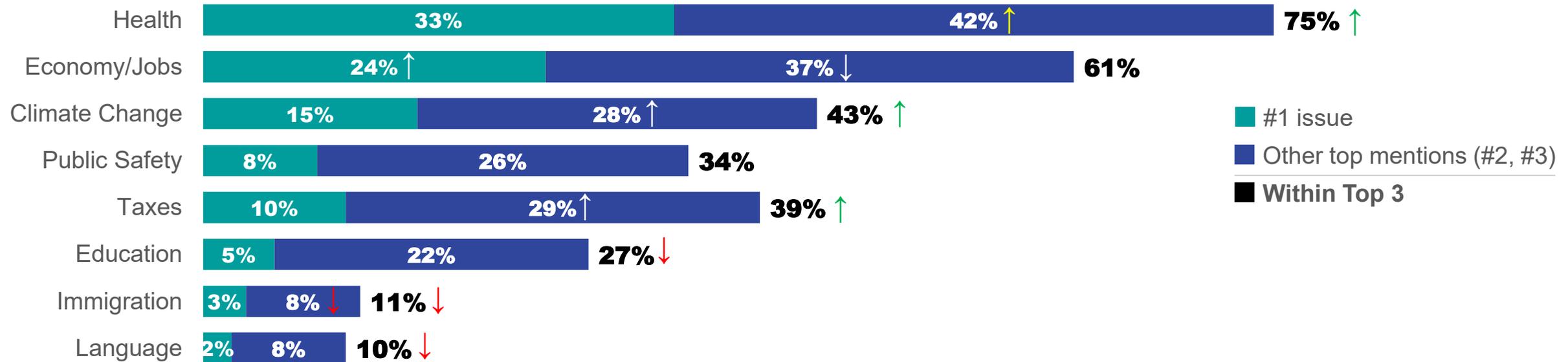
Some questions in this survey have also been asked in previous waves, notably in November 2020 (n=1,150) and November 2019 (n=1,003). Where appropriate, this report will make reference to this previous wave when discussing the results.

Most Important Issues Facing Canadians

Three-quarters of Canadians (75%, +6 compared to 2020) mention health care as one of their top-three concerns, a six-point increase from 2020. A third (33%, +1) of respondents say that it is their number one concern, rising to 46% among those aged 55+ (-2).

The economy and jobs remain firmly on the minds of many Canadians, especially given the events of the past 18 months; 61% (-1) name it among their top three and 24% say it is their main concern (+2). Those in Alberta are significantly more likely than those elsewhere to cite the economy and jobs as their top concern (45%, +15).

Though in third place, attention to climate change has significantly increased in importance since last year (43%, +5). Approximately one in seven (15%, +1) name climate change as their main issue.

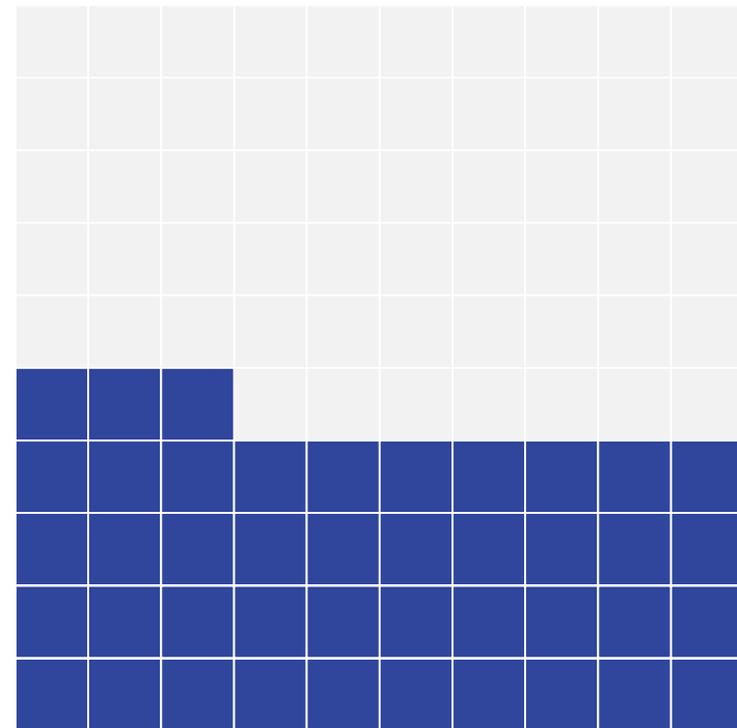
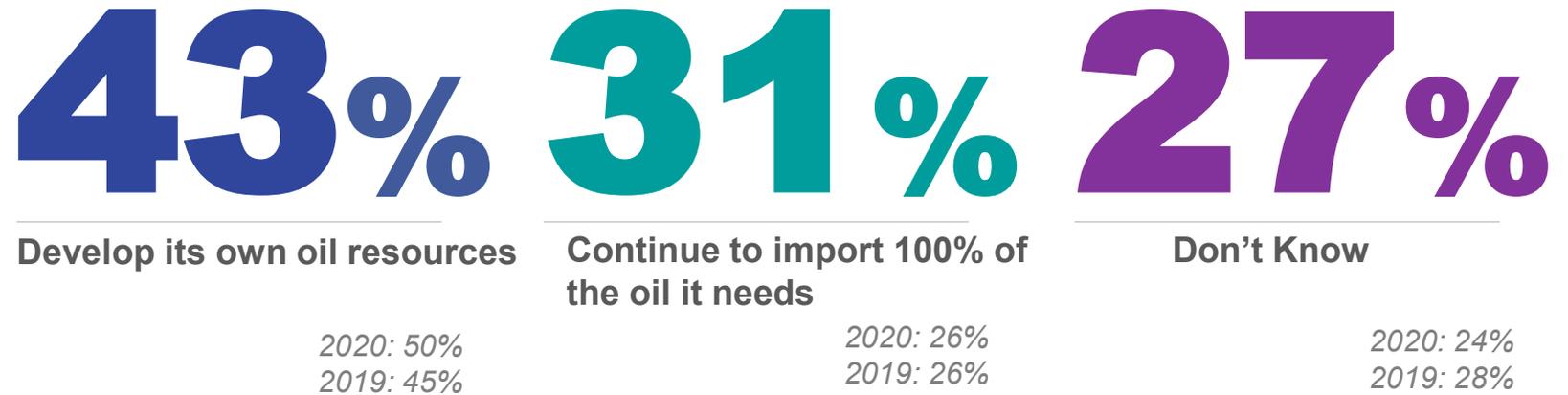


Q1. What are the most important issues facing you today? Please rank in order of priority.
 Base: All respondents in 2021 (n=1,150), 2020 (n=1,150), and 2019 (n=1,003)

Continue to Import Oil or Develop Own Supply?



Attitudes on Quebec's Oil Supply

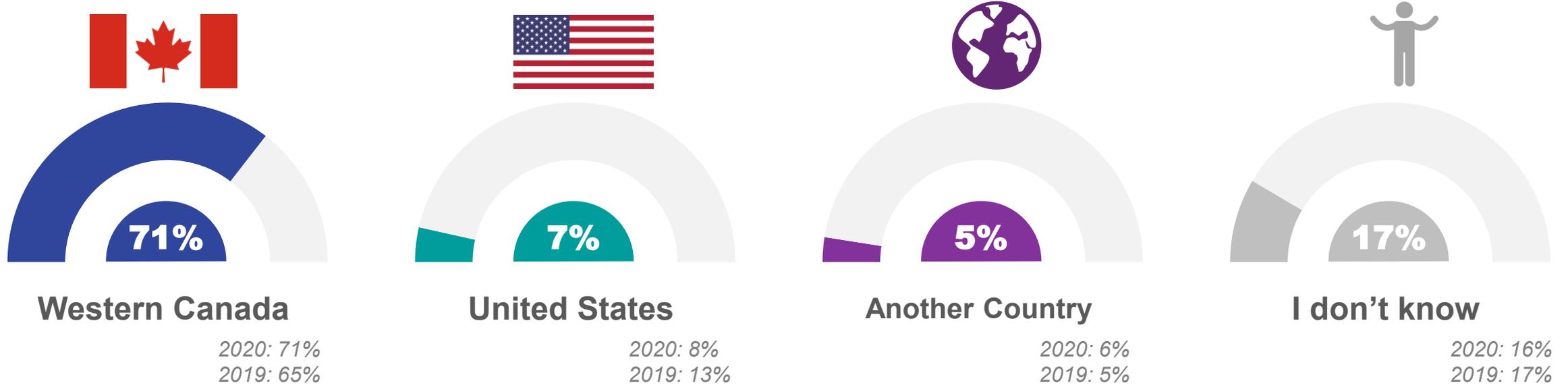


More than 4 Quebecers out of 10 believe that their province should develop its own oil resources instead of importing all the oil it consumes. This represents a decrease of 7 points compared to last year. Inversely, More than 3 respondents in 10 (31%) still think that the province should continue importing oil, an increase of 5 points. This proportion is significantly higher among men (38% +5).

The remaining Quebec respondents (27% +3) don't know the best way for the province to meet its energy needs. Women are more likely to say they don't know (37% +5).

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 in 2021 (n=400), 2020 (n=400), and 2019 (n=400)

Where to Import Oil From?

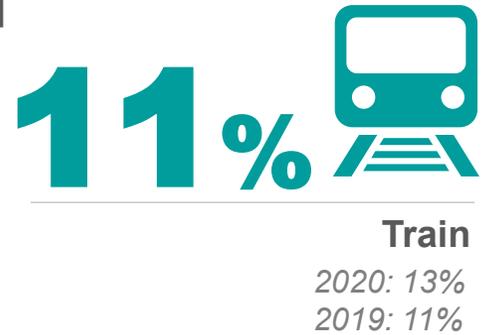
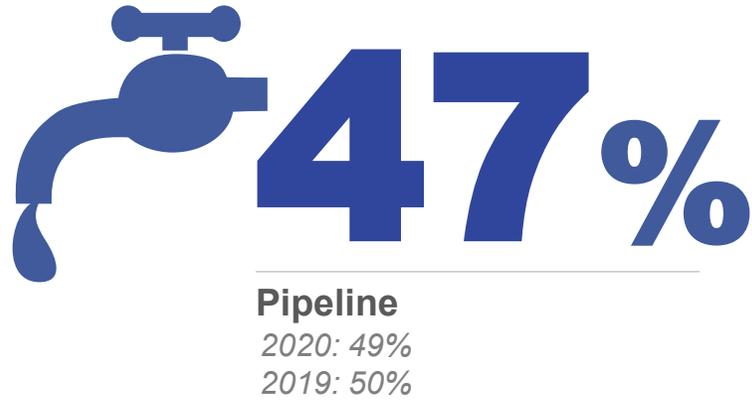


The proportion of Quebecers who prefer that the province's oil come from domestic sources remains stable compared to last year. When asked where the oil imported by Quebec should come from, a large majority (71%) of Quebecers say Western Canada, unchanged from last year.

Only 7% of Quebecers would prefer that the province import its oil from the United States (-1). Another 5% (-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 in 2021 (n=400), 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, though this masks some important regional variation year-over-year. Slightly under half (47%) believe that pipelines are the safest means of transporting oil, a two-point decrease from last year. Those in Alberta (66%, -11) are the most positive about this option, though their enthusiasm seems to have faded. Quebecers remain the least favourable towards transporting oil via pipeline, and have become even less positive (37% -4).

On the other hand, transporting oil by pipeline has become slightly more favourable among those in British Columbia (55%, +8) and Saskatchewan/Manitoba (62%, +9). Men (55%, -2) and Canadians aged 55+ (63%, -1) are more likely than women and younger Canadians, respectively, to believe pipelines are the safest.

Similar to last year, trains are seen as the second-safest means of transporting oil (11%, -2), followed by tanker trucks (7%, -1), and ships (5%, -1). Three Canadians out of 10 (30% +5) say they don't know the safest means of transporting oil, a five-point increase over last year.

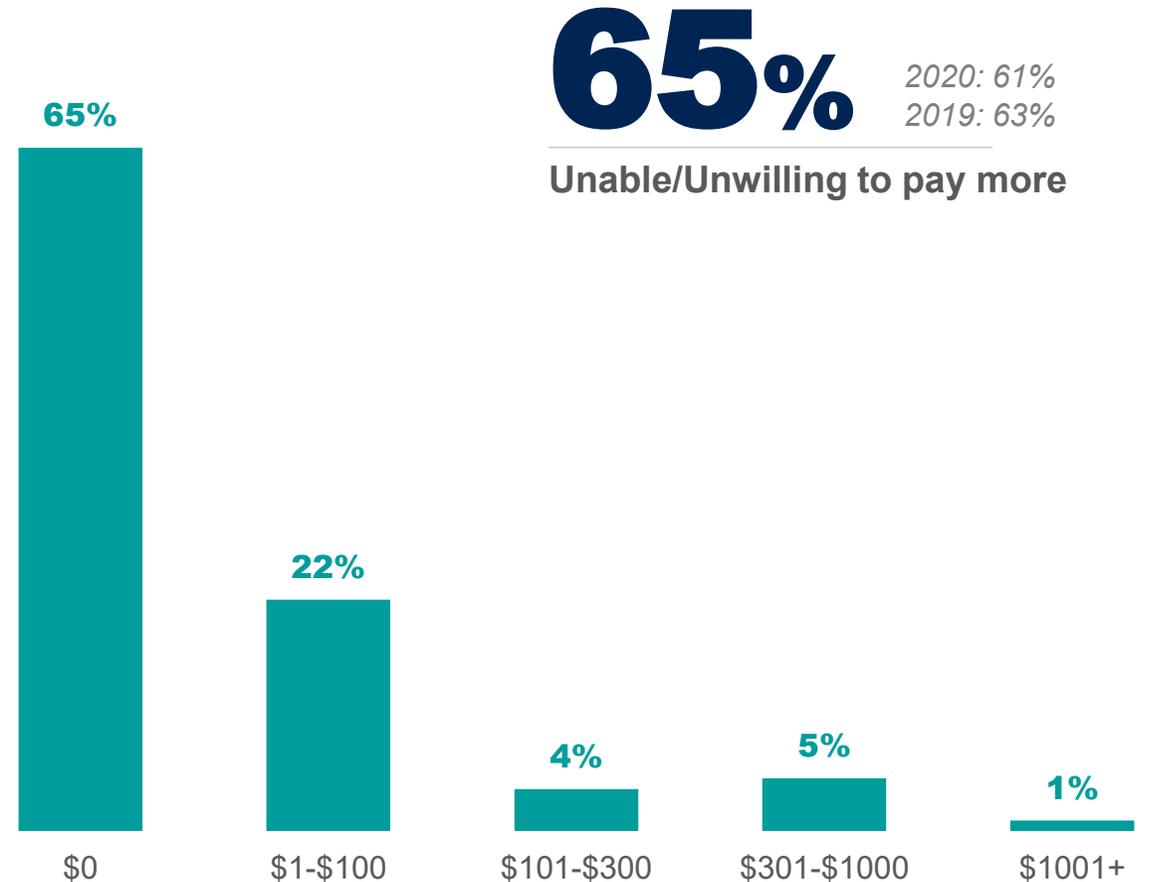
Q4. In your opinion, which of the following is the safest means of transporting oil?
Base: All respondents in 2021 (n=1,150), 2020 (n=1,150), and 2019 (n=1,003)

Would You Pay More to Help Fight Climate Change?

Even though climate change is the top issue for 15% of Canadians and more than four in ten place it in their list of top three issues, the fact remains that 65% (+4) 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, only a third (35%, -9) would be prepared to pay more than \$100 in extra taxes per year.

While those who say climate change is their top issue are more willing to put their money where their mouth is, being willing to pay \$1,124 more per year on average, Canadians as a whole are on average willing to pay \$359 extra per year (down from \$392 last year). This amounts to the equivalent of another \$30 per month in extra costs to help fight climate change.



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 in 2021 (n=1,150), 2020 (n=1,150), and 2019 (n=1,003). Please note that outlier values have been excluded from the calculation of the mean.

Future of Carbon Capture in Quebec



Nearly 7 out of 10 Quebecers agree with the idea that carbon capture technologies should be more a part of environmental policies in Quebec. This includes 37% who strongly agree and 31% who somewhat agree with the statement.

Men (76%) tend to agree more ('strongly' and 'somewhat') with this statement compared to Women (61%). Moreover, this jumps to 8 in 10 for those individuals who said climate change was among their top three most important issues (80%).

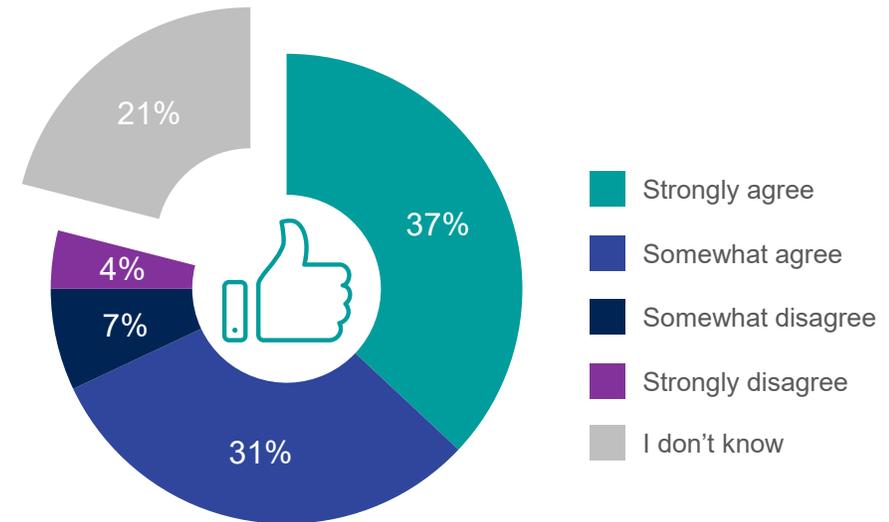
Only 1 out of 10 (11%) disagree with the idea that these technologies should feature more heavily in Quebec's environmental policies. However, 2 out of 10 (21%) said that they didn't know.

68%

Agree

11%

Disagree



Carbon capture technologies should be more of a part of environmental policies

Q9. To what extent do you agree or disagree with the following statement: "Carbon capture technologies should be more of a part of environmental policies in Quebec"?
Base: All respondents in Quebec (n=400)

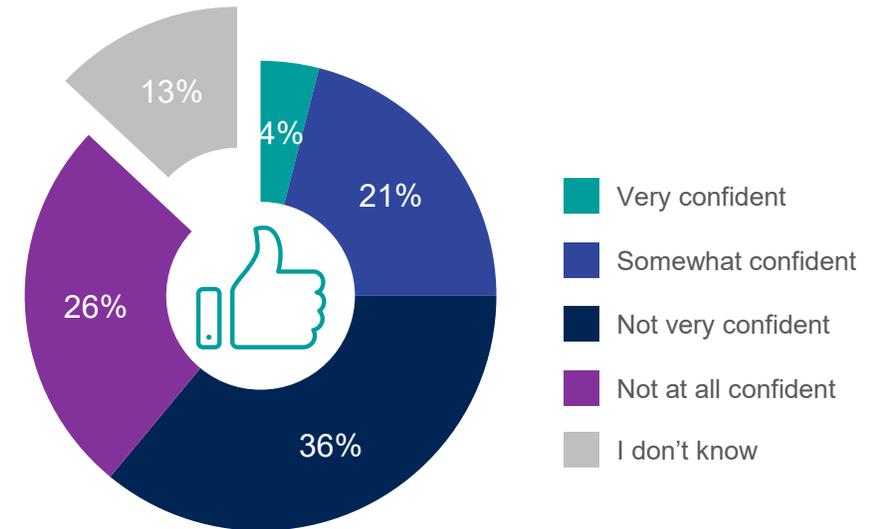
Confidence in COP26

Only one quarter (25%) of Canadians are confident that the 26th United Nations Climate Change Conference (also known as COP26) will help find concrete solutions to these problems. Only 4% of respondents are 'very confident' and a little over a fifth of them are 'somewhat confident' (21%). Quebec stands out as the most optimistic province, where 36% say they are confident ('very' or 'somewhat').

A generational gap seems to be taking shape, where Canadians aged from 18 to 34 are more likely to be confident (7% 'very' and 30% 'somewhat') compared to those aged 55 or more (44% 'not very' and 32% 'not at all'). Moreover, Canadian households that have a child under 18 years of age are equally more likely to be confident in the COP26 (36%).

25% Confident

61% Less Confident



Confidence in finding concrete solutions at COP26

Q10. The 26th United Nations Climate Change Conference is currently underway in Scotland. How confident are you that this conference will help find concrete solutions to climate change?
Base: All respondents (n=1,150)

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