

CANADA'S AND QUEBEC'S ENERGY NEEDS

Montreal Economic Institute

Research report

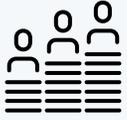
November 2022

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 **IEDM** Des idées pour une société plus prospère

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Methodology



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



A sample of 1,162 Canadian residents aged 18 years and over, with an oversample of 400 residents in Quebec, was interviewed between the 10th and 13th of November 2022.



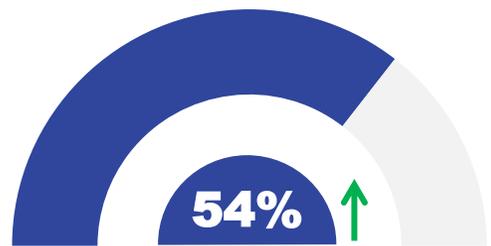
Weighting according to age, gender and region was employed to ensure that the sample's composition reflects the overall population according to the latest census information.



The precision of Ipsos online polls is measured using a credibility interval. In this case, the results are accurate to within +/- **3.3 percentage points, 19 times out of 20**, of what the results would have been had all Canadian adults been polled.

More than half (54%) of Quebecers in favour of exploiting Quebec's own oil resources, a significant 11-point increase compared to 2021.

Attitudes concerning Quebec's oil supply



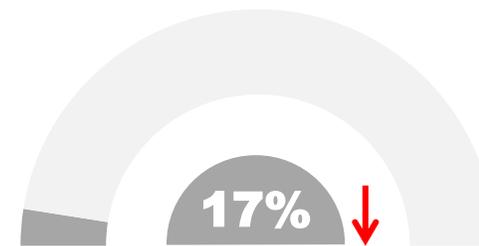
Develop its own oil resources

2021: 43 %
2020: 50 %
2019: 45 %



Continue to import 100% of the oil it needs

2021: 31%
2020: 26 %
2019: 26 %



I don't know

2021: 27%
2020: 24 %
2019: 28 %

Q1. 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: All respondents in Quebec in 2022 (n=405), 2021 (n=400), 2020 (n=400) et 2019 (n=400)

  Significantly higher or lower compared to previous wave

Attitudes concerning Quebec's oil supply by socio-demographic group

	Total	Age			Gender		Region			
		18-34	35-54	55+	Male	Female	West	Ontario	Quebec	Atlantic
		A	B	C	D	E	F	G	H	I
Develop its own oil resources	54%	58% B	47%	57% B	55%	54%	-	-	54%	-
Continue to import 100% of the oil it needs	29%	31%	30%	27%	36% E	22%	-	-	29%	-
I don't know / prefer not to answer	17%	11%	22% A	16%	9%	24% D	-	-	17%	-

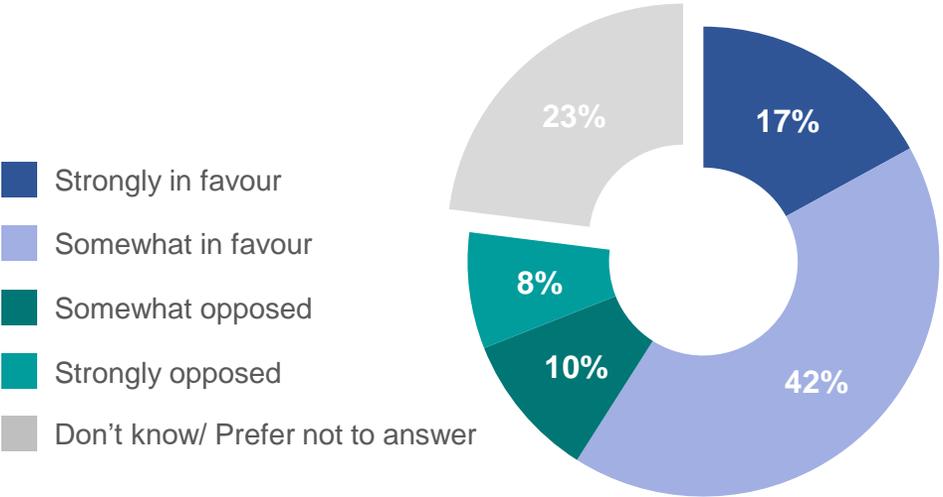
Six in ten (59%) Canadians in favour of increasing incentive measures for carbon sequestration to be equivalent to those offered by the American government.

59%

In favour

18%

Opposed



Increasing incentive measures for carbon sequestration

Q2. One of the ways being considered to reduce GHG emissions from the extraction of oil and natural gas in Canada is carbon sequestration. The United States currently offers incentive measures that cover roughly two thirds of the costs for such projects, while incentives offered in Canada cover roughly a quarter of project costs. Would you be in favour or opposed to the Canadian government increasing the incentive measures offered so they would be the equivalent to those offered by the American government?

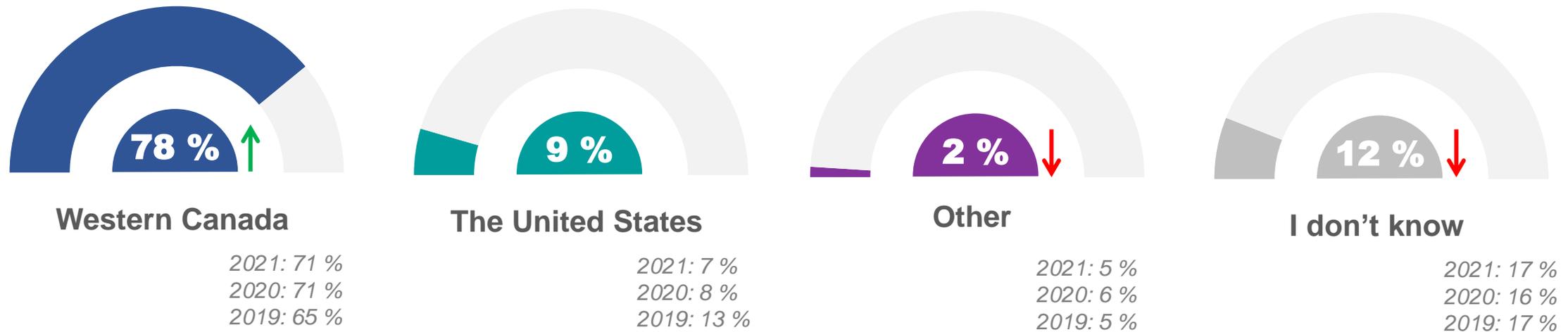
Base: All respondents (n=1,162)

Increasing incentive measures for carbon sequestration by socio-demographic group

	Total	Age			Gender		Region			
		18-34	35-54	55+	Male	Female	West	Ontario	Quebec	Atlantic
		A	B	C	D	E	F	G	H	I
In favour	59%	53%	57%	64% AB	63% E	55%	54%	60%	60%	69% F
Opposed	18%	17%	20%	16%	22% E	14%	22% GHI	16%	16%	13%

Almost eight in ten (78%) Quebecers prefer to import oil from Western Canada – a 7-point increase compared to last year.

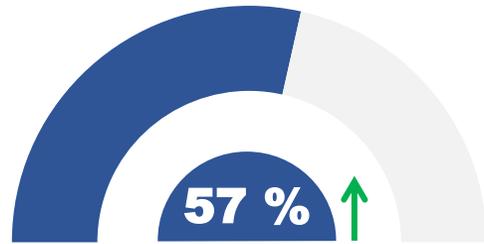
Attitudes about the source of Quebec's imported oil



Attitudes about the source of Quebec's imported oil by socio-demographic group

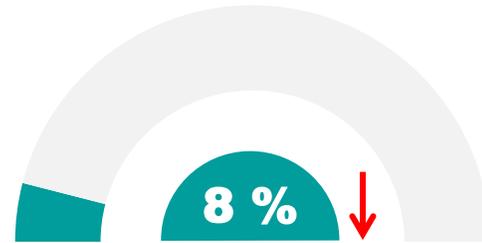
	Total	Age			Gender		Region			
		18-34	35-54	55+	Male	Female	West	Ontario	Quebec	Atlantic
		A	B	C	D	E	F	G	H	I
Western Canada	78%	76%	72%	83% B	76%	79%	-	-	78%	-
The United States	9%	11% C	11% C	5%	12% E	6%	-	-	9%	-
Other	2%	4%	2%	2%	4% E	1%	-	-	2%	-

A majority of Canadians (57%) believe that the pipeline is the safest means of transporting oil, a significant 10-point increase since 2021.



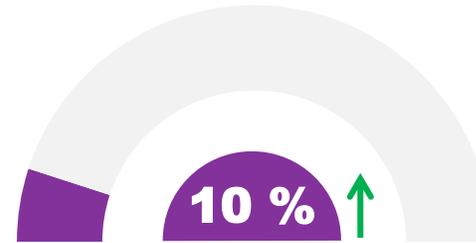
Pipeline

2021: 47 %
2020: 49 %
2019: 50 %



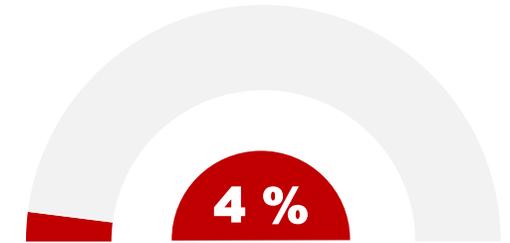
Train

2021: 11 %
2020: 13 %
2019: 11 %



Tanker truck

2021: 7 %
2020: 8 %
2019: 7 %



Ship

2021: 5 %
2020: 6 %
2019: 4 %

Safest means of transporting oil



I don't know

2021: 30 %
2020: 25 %
2019: 27 %

Safest means of transporting oil by socio-demographic group

	Total	Age			Gender		Region			
		18-34	35-54	55+	Male	Female	West	Ontario	Quebec	Atlantic
		A	B	C	D	E	F	G	H	I
Pipeline	57%	43%	53% A	70% AB	64% E	51%	62% H	56% H	50%	64% H
Train	8%	11% C	8%	6%	8%	9%	6%	7%	14% FG	9%
Tanker Truck	10%	11% C	11% C	7%	10%	9%	9%	11% I	10%	5%
Ship	4%	6%	4%	3%	4%	4%	4%	3%	6% I	1%

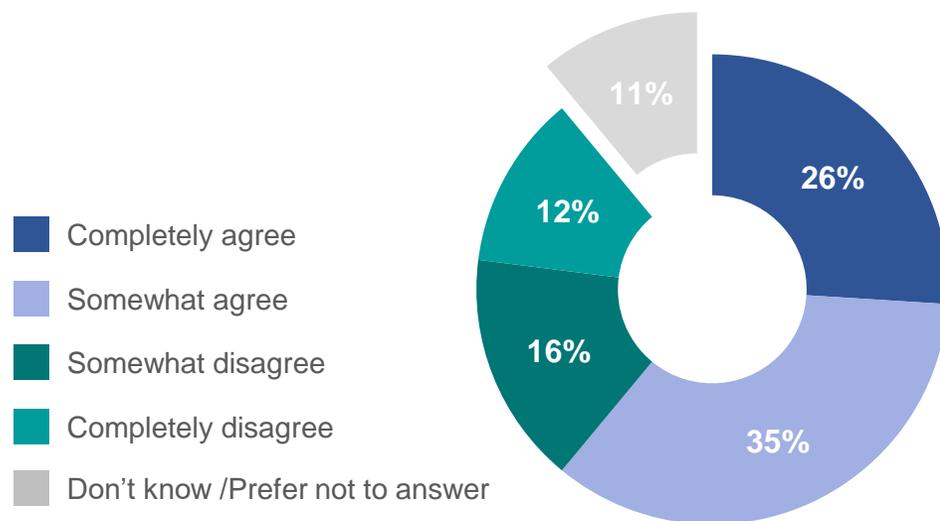
In light of the war in Ukraine, six in ten (61%) Quebecers believe that Quebec should extract its own natural gas in order to export some to Europe and reduce its dependency on Russian gas.

61%

Agree

28%

Disagree



Extract and export Quebec's natural gas to Europe

Q5. The invasion of Ukraine by Russia has destabilized Europe's energy supply because several countries, like Germany, depended on Russian natural gas. To what extent do you think that Quebec should extract its own natural gas resources to export some to Europe?
Base: All respondents in Quebec in 2022 (n=405).

Extracting and exporting Quebec's natural gas by socio-demographic group

	Total	Age			Gender		Region			
		18-34	35-54	55+	Male	Female	West	Ontario	Quebec	Atlantic
		A	B	C	D	E	F	G	H	I
Agree (Completely/somewhat)	61%	61%	59%	62%	65% E	56%	-	-	61%	-
Disagree (Completely/somewhat)	28%	28%	28%	28%	26%	30%	-	-	28%	-

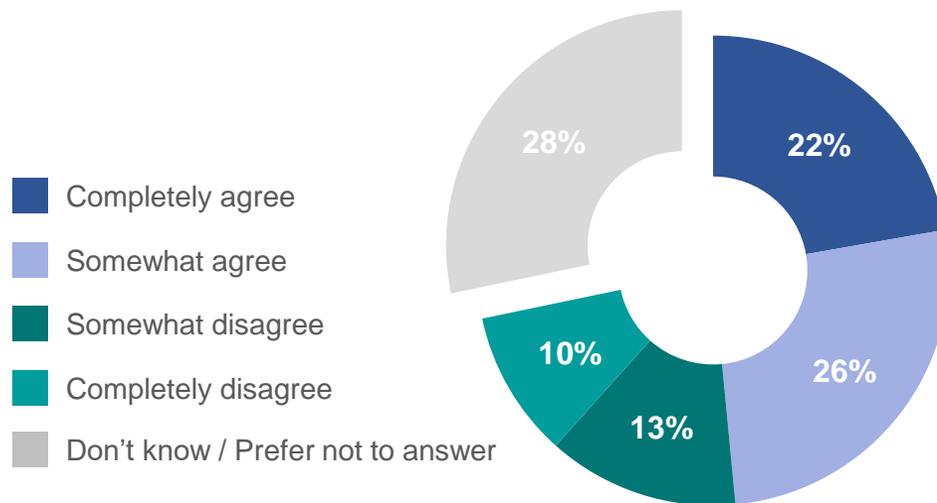
Almost half of Canadians (49%) believe the Quebec government should reverse its decision and approve the LNG project in order to export natural gas to Europe by passing through the Saguenay; almost a quarter disagree (23%).

49%

Agree

23%

Disagree



Quebecers are more likely to disagree: 30% vs. 18% West; 23% Ontario; 20% Atlantic

The government should reverse its decision and approve the GNL project in Quebec

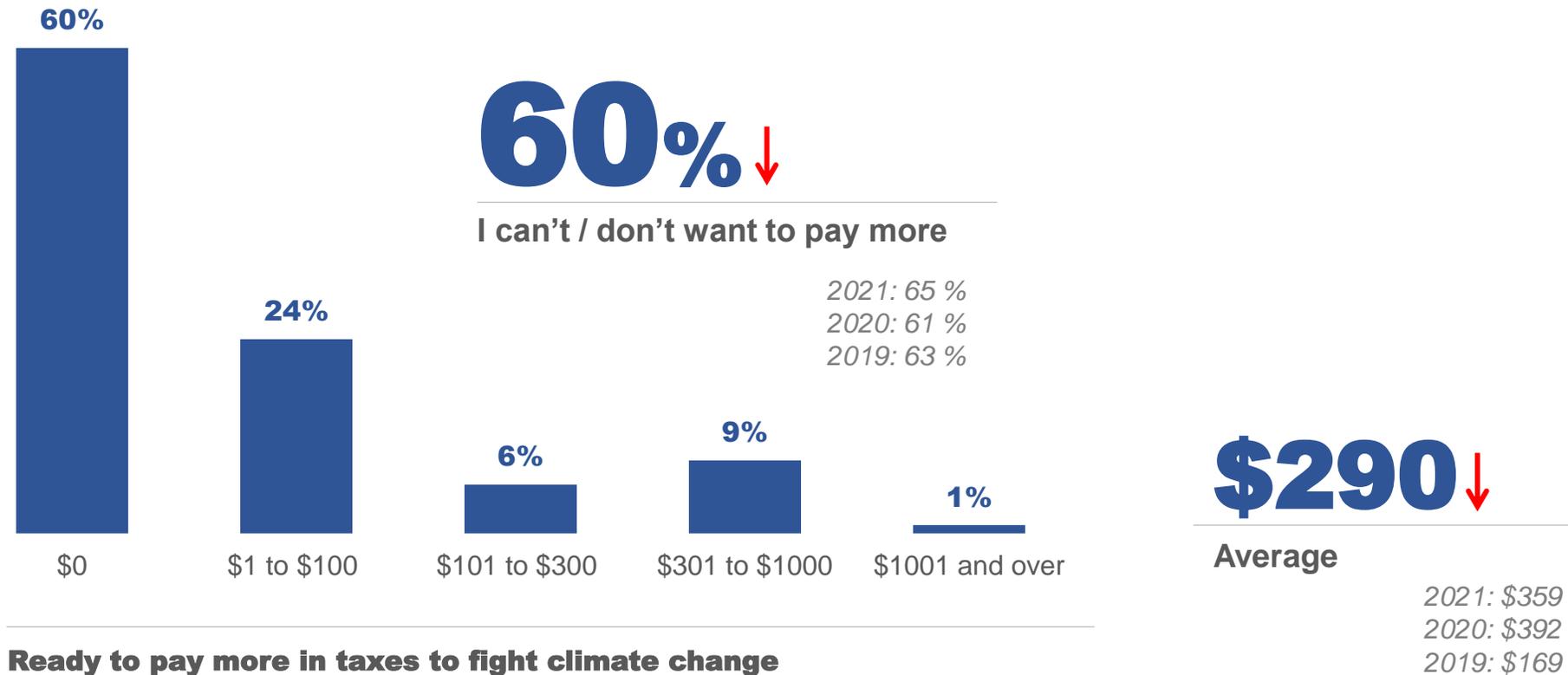
Q6. The Quebec LNG project aimed to export natural gas from Western Canada to Europe by passing through the Saguenay and was rejected by the government in 2021. To what extent do you agree that the Quebec government should reverse its decision and approve this project?
Base: All respondents (n=1,162)

Approving the LNG project by socio-demographic group

	Total	Age			Gender		Region			
		18-34	35-54	55+	Male	Female	West	Ontario	Quebec	Atlantic
		A	B	C	D	E	F	G	H	I
Agree (Completely/somewhat)	49%	41%	47%	56% AB	59% E	39%	55% G	40%	53% G	57% G
Disagree (Completely/somewhat)	23%	27%	21%	22%	22%	24%	18%	23%	30% FGI	20%

Six in ten Canadians (60%) can't or don't want to pay more in taxes to fight climate change.

Among those who are ready to pay more, the acceptable increase is \$290 per year on average, declining for the third consecutive year.



Q7. 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 2022 (n=1,162), 2021 (n=1,150), 2020 (n=1,150) et 2019 (n=1,003).

↑ ↓ Significantly higher or lower compared to previous wave

Increasing taxes to fight against climate change by socio-demographic group

	Total	Age			Gender		Region			
		18-34	35-54	55+	Male	Female	West	Ontario	Quebec	Atlantic
		A	B	C	D	E	F	G	H	I
Can't or won't pay more	60%	57%	60%	63%	60%	60%	66% GH	56%	56%	67% GH

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