CANADA'S AND QUEBEC'S ENERGY PROJECTS

Montreal Economic Institute

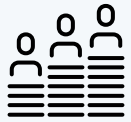
Research report

November 2023

MEI Ideas for a More Prosperous Society

Ipsos

Methodology



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

A sample of 1,161 Canadian residents aged 18 years and over, with an oversample of 403 residents in Quebec, was interviewed between the 18th and 21st of October 2023.

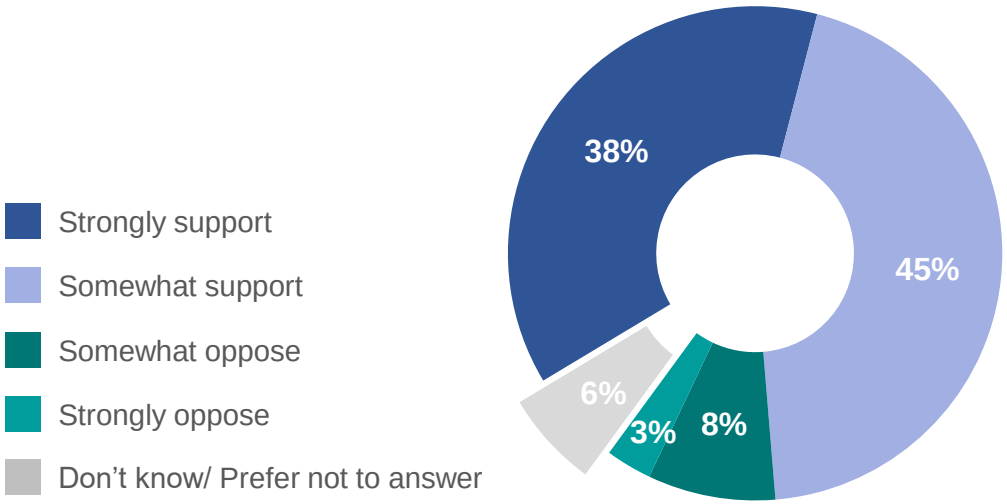
Weighting according to age, gender and region was employed to ensure that the sample's composition reflects the overall population according to the latest census information.

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 – *Uppercase letters are used in tables throughout the report to indicate statistically significant differences between columns.*

Of the strategies tested to respond to the end of electricity surpluses in Quebec, support was strongest for building more wind farms (82%) with few in opposition (11%).

Quebec only

Building more wind farms



82%
Support

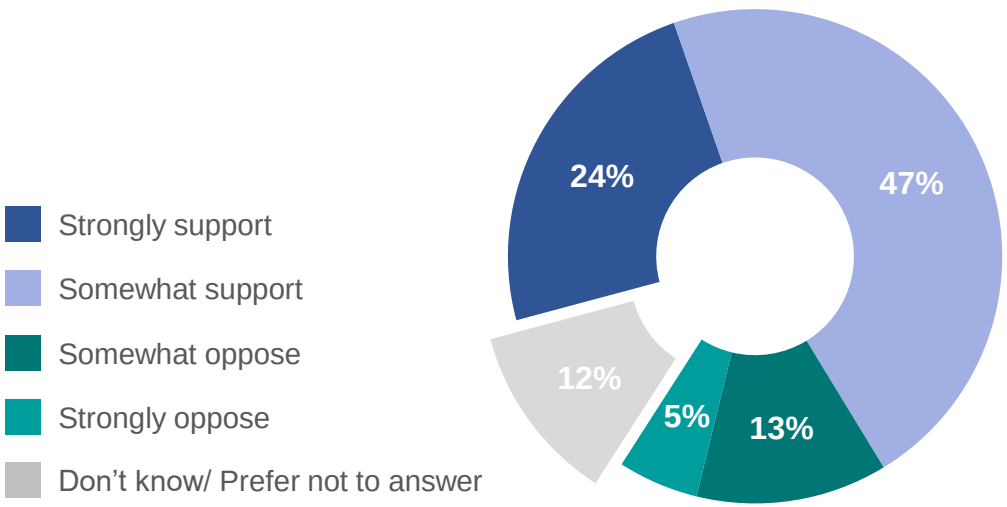
11%
Oppose

Q1. Based on its current supply, Hydro-Québec is expected to run out of surplus power in 2027. This has led the government to postpone or cancel some industrial development projects. Do you support or oppose the following ways to address this lack of capacity? – Building more wind farms
Base: All respondents in Quebec in 2023 (n=403)

Seven-in-ten Quebecers (70%) support building more hydroelectric dams to address the end of Hydro-Quebec surpluses projected for 2027.

Quebec only

Building more hydroelectric dams



70% Support

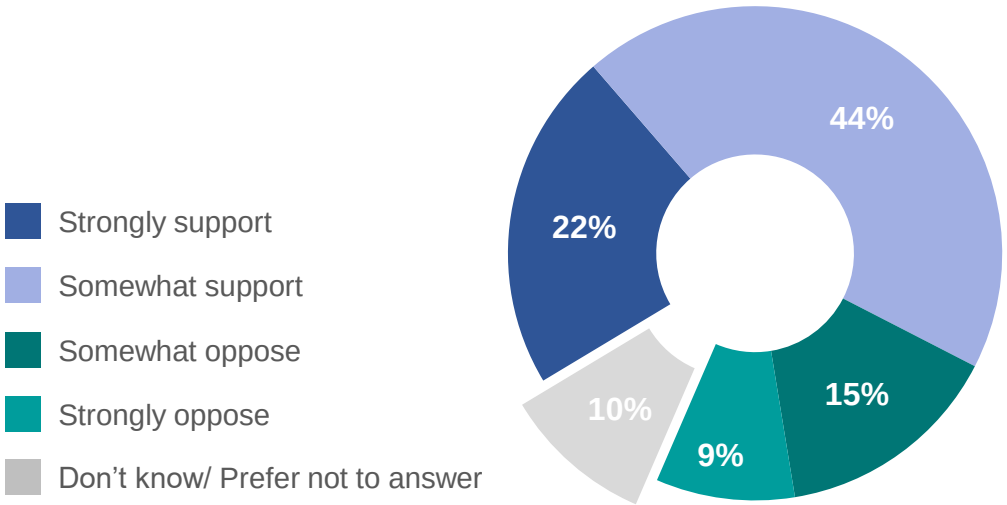
18% Oppose

Q1. Based on its current supply, Hydro-Québec is expected to run out of surplus power in 2027. This has led the government to postpone or cancel some industrial development projects. Do you support or oppose the following ways to address this lack of capacity? – Building more hydroelectric dams
Base: All respondents in Quebec in 2023 (n=403)

While two-thirds of Quebecers (66%) support introducing new price mechanisms to encourage energy conservation, almost a quarter (24%) would oppose this strategy.

Quebec only

Introducing new price mechanisms to encourage energy conservation



66%
Support

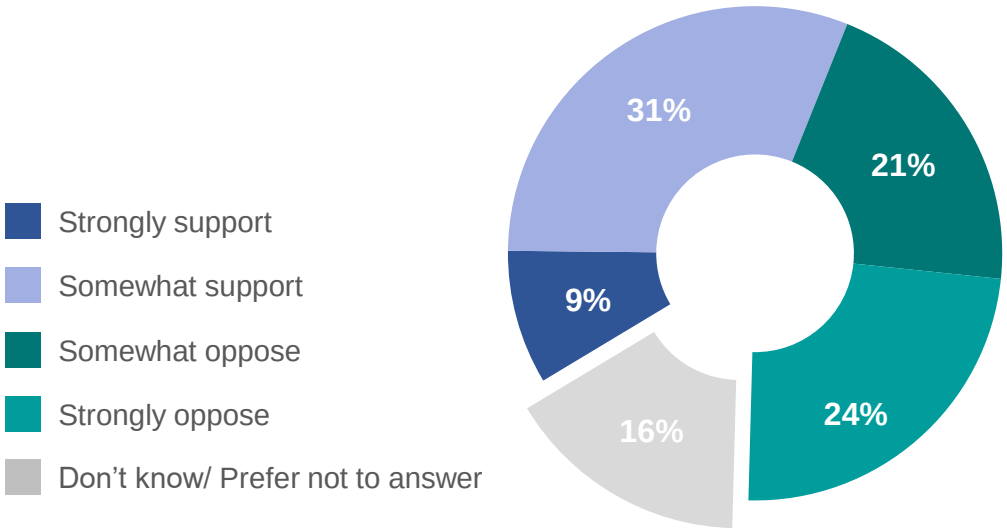
24%
Oppose

Q1. Based on its current supply, Hydro-Québec is expected to run out of surplus power in 2027. This has led the government to postpone or cancel some industrial development projects. Do you support or oppose the following ways to address this lack of capacity? – Introducing new price mechanisms to encourage energy conservation
Base: All respondents in Quebec in 2023 (n=403)

Quebecers are more divided when it comes to nuclear facilities, with opposition (44%) narrowly outstripping support (40%) for this method of energy generation.

Quebec only

Relying on existing or newly-built nuclear facilities



40%
Support

44%
Oppose

Q1. Based on its current supply, Hydro-Québec is expected to run out of surplus power in 2027. This has led the government to postpone or cancel some industrial development projects. Do you support or oppose the following ways to address this lack of capacity? – Relying on existing or newly-built nuclear facilities
Base: All respondents in Quebec in 2023 (n=403)

Support for means to address Hydro-Quebec's lack of energy capacity by socio-demographic group

Quebec only

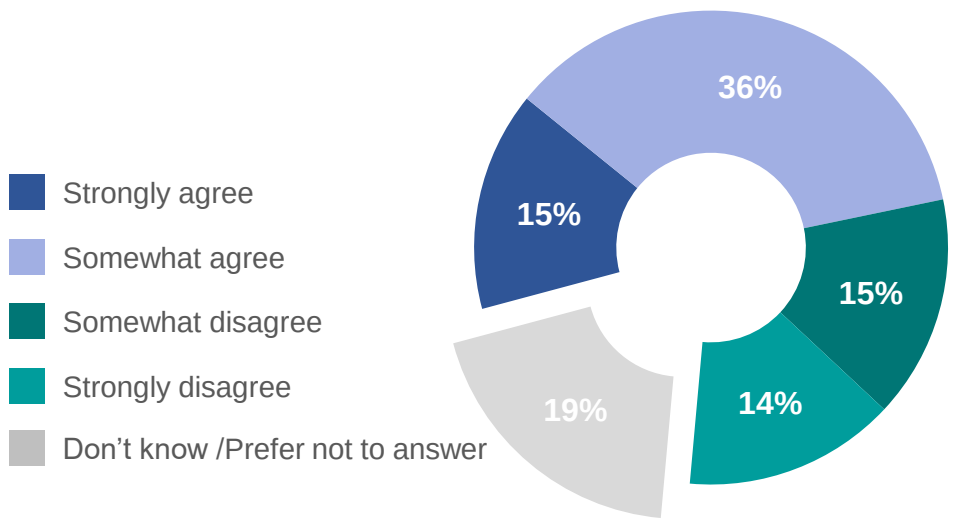
		Quebec Only	Age			Gender	
			18-34	35-54	55+	Male	Female
			A	B	C	D	E
Respondents		n=403	108	137	158	197	206
Building more wind farms	Support (Strongly/somewhat)	82%	79%	85%	82%	83%	82%
	Oppose (Strongly/somewhat)	11%	15%	11%	9%	12%	11%
Building more hydroelectric dams	Support (Strongly/somewhat)	70%	74%	72%	67%	73%	68%
	Oppose (Strongly/somewhat)	18%	17%	16%	20%	18%	17%
Introducing new price mechanisms to encourage energy conservation	Support (Strongly/somewhat)	66%	62%	71%	65%	69%	64%
	Oppose (Strongly/somewhat)	24%	29%	20%	24%	25%	23%
Relying on existing or newly-built nuclear facilities	Support (Strongly/somewhat)	40%	42%	41%	37%	45% E	35%
	Oppose (Strongly/somewhat)	44%	44%	42%	47%	45%	44%

Q1. Based on its current supply, Hydro-Québec is expected to run out of surplus power in 2027. This has led the government to postpone or cancel some industrial development projects. Do you support or oppose the following ways to address this lack of capacity?
Base: All respondents in Quebec in 2023 (n=403)

Half of Quebecers (51%) agree that the provincial government should revive the GNL Quebec project to export liquefied natural gas to European countries as an alternative to Russian natural gas.

Quebec only

Revive GNL Quebec project and export Canada's natural gas to Europe



51% Agree

30% Disagree

Q2. The GNL Québec project that sought to export natural gas from Western Canada to Europe from the Saguenay region was abandoned by the Quebec government in 2021. Do you agree or disagree that the Quebec government should revive the project to export liquefied natural gas to European countries like Germany to provide an alternative to Russian natural gas?
Base: All respondents in Quebec in 2023 (n=403)

Revive GNL Quebec project and export Canada's natural gas to Europe by socio-demographic group

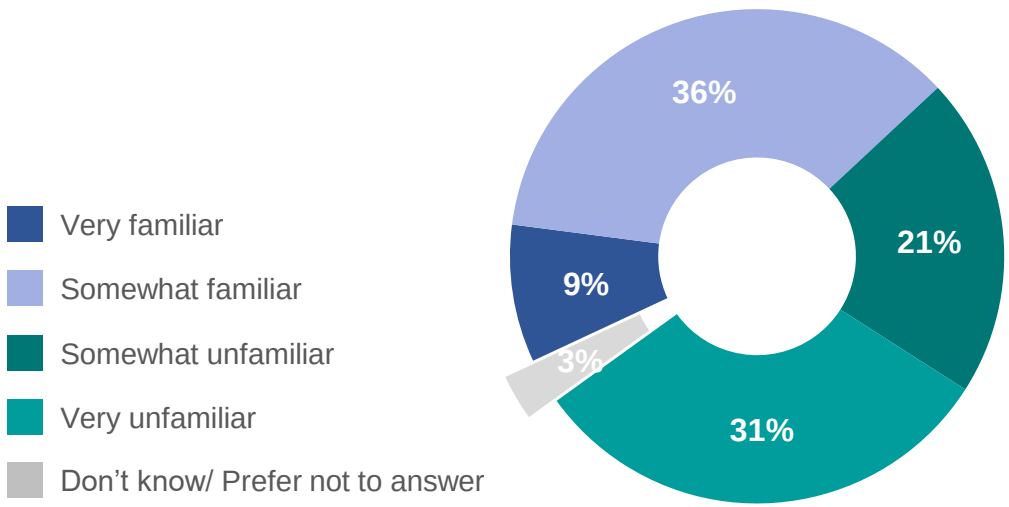
Quebec only

	Quebec only	Age			Gender	
		18-34	35-54	55+	Male	Female
		A	B	C	D	E
Respondents	**n=403**	**108**	**137**	**158**	**197**	**206**
Agree (Strongly/somewhat)	51%	57% C	54%	45%	60% E	42%
Disagree (Strongly/somewhat)	30%	24%	30%	33%	31%	28%

Q2. The GNL Québec project that sought to export natural gas from Western Canada to Europe from the Saguenay region was abandoned by the Quebec government in 2021. Do you agree or disagree that the Quebec government should revive the project to export liquefied natural gas to European countries like Germany to provide an alternative to Russian natural gas?
Base: All respondents in Quebec in 2023 (n=403)

More Canadians (53%) are unfamiliar with carbon sequestration as a technology to combat GHGs.

Familiarity with carbon sequestration technologies



45%
Familiar

53%
Unfamiliar

Q3. Some companies are fighting climate change through a technology called "carbon capture and underground storage," also known as "carbon sequestration." This technology refers to measures to take carbon emissions, either from the atmosphere or industrial processes, and store them deep underground where they can't harm our climate.
a. How would you describe your level of familiarity with these technologies?
Base: All respondents 2023 (n=1,161)

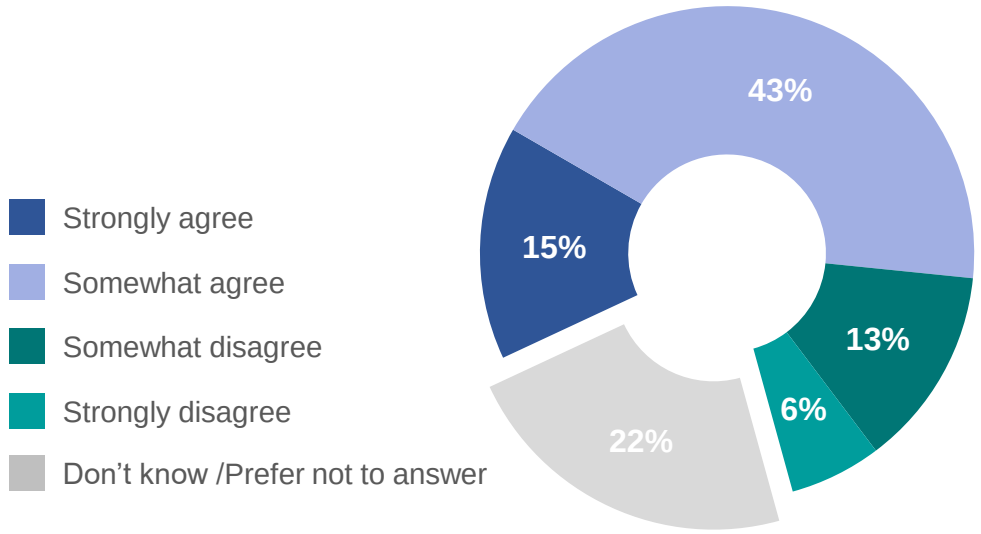
Familiarity with carbon sequestration technologies by socio-demographic group

	Total	Age			Gender		Region					
		18-34	35-54	55+	Male	Female	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic
		A	B	C	D	E	F	G	H	I	J	K
Respondents	**n=1161**	**320**	**397**	**444**	**562**	**599**	**128**	**115**	**66**	**385**	**403**	**64**
Familiar (Very/somewhat)	45%	55% BC	44% C	37%	55% E	35%	51% J	57% J	54% IJ	47% J	26%	54% J
Unfamiliar (Very/somewhat)	53%	43%	53% A	60% AB	43%	62% D	47%	42%	45%	51%	71% FGHIK	43%

Q3. Some companies are fighting climate change through a technology called “carbon capture and underground storage,” also known as “carbon sequestration.” This technology refers to measures to take carbon emissions, either from the atmosphere or industrial processes, and store them deep underground where they can’t harm our climate.
a. How would you describe your level of familiarity with these technologies?
Base: All respondents 2023 (n=1,161)

Despite their lack familiarity, nearly six-in-ten Canadians (59%) agree that “carbon capture and sequestration” can make a meaningful difference in the fight against climate change.

Carbon sequestration can make a difference in the fight against climate change



59%
Agree

19%
Disagree

Q3. Some companies are fighting climate change through a technology called “carbon capture and underground storage,” also known as “carbon sequestration.” This technology refers to measures to take carbon emissions, either from the atmosphere or industrial processes, and store them deep underground where they can’t harm our climate.
b. Given what you know now, do you agree or disagree that carbon capture and sequestration can make a meaningful difference in the fight against climate change?
Base: All respondents 2023 (n=1,161)

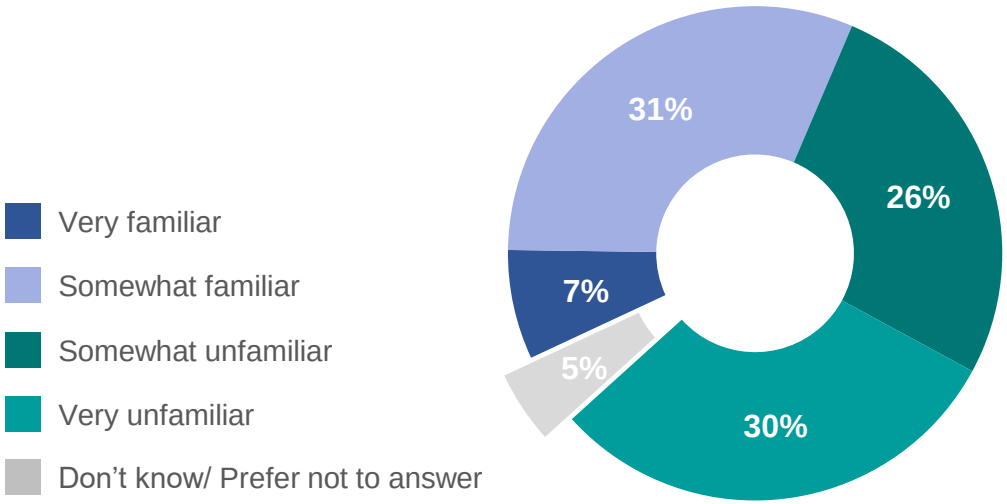
Carbon sequestration can make a difference in the fight against climate change by socio-demographic group

	Total	Age			Gender		Region					
		18-34	35-54	55+	Male	Female	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic
		A	B	C	D	E	F	G	H	I	J	K
Respondents	**n=1161**	**320**	**397**	**444**	**562**	**599**	**128**	**115**	**66**	**385**	**403**	**64**
Agree (Strongly/somewhat)	59%	68% BC	57%	53%	64% E	53%	60%	59%	67% J	60% J	51%	65% J
Disagree (Strongly/somewhat)	19%	18%	19%	20%	22% E	17%	22%	26% IK	16%	16%	22% IK	13%

Q3. Some companies are fighting climate change through a technology called “carbon capture and underground storage,” also known as “carbon sequestration.” This technology refers to measures to take carbon emissions, either from the atmosphere or industrial processes, and store them deep underground where they can’t harm our climate.
b. Given what you know now, do you agree or disagree that carbon capture and sequestration can make a meaningful difference in the fight against climate change?
Base: All respondents 2023 (n=1,161)

Familiarity with “energy corridors” remains low in the country with fewer than four-in-ten Canadians (38%) familiar with the concept (and just 7% very familiar).

Familiarity with “energy corridors”



38%
Familiar

57%
Unfamiliar

Q4. The concept of “energy corridors” refers to a long area where a right-of-way exists for energy transportation projects such as power lines and pipelines. How would you describe your level of familiarity with “energy corridors” as a concept?
Base: All respondents 2023 (n=1,161)

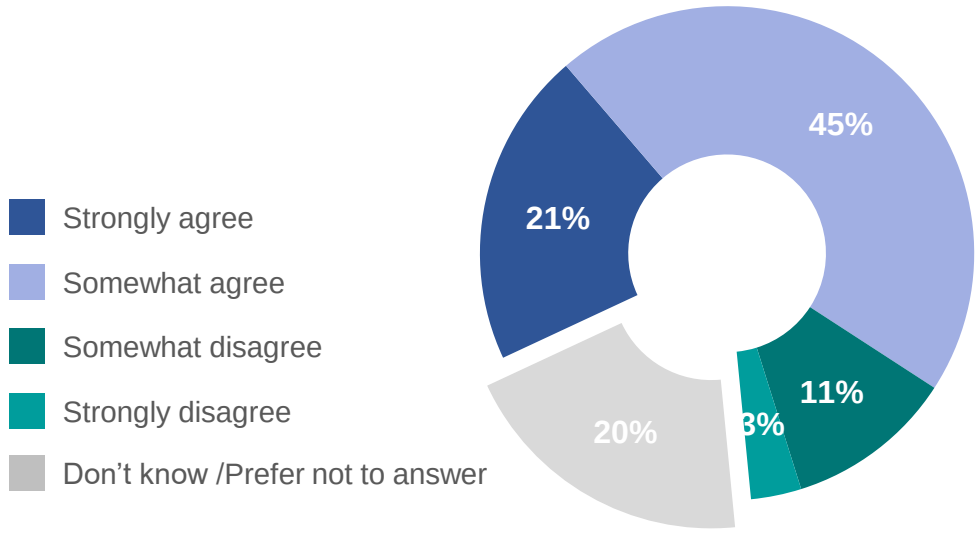
Familiarity with “energy corridors” by socio-demographic group

	Total	Age			Gender		Region					
		18-34	35-54	55+	Male	Female	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic
		A	B	C	D	E	F	G	H	I	J	K
Respondents	**n=1161**	**320**	**397**	**444**	**562**	**599**	**128**	**115**	**66**	**385**	**403**	**64**
Familiar (Very/somewhat)	38%	47% BC	39% C	32%	47% E	30%	39% J	52% IJK	49% JK	41% J	27%	31%
Unfamiliar (Very/somewhat)	57%	49%	57% A	62% AB	49%	64% D	56%	47%	49%	53%	68% FGHI	64% GHI

Q4. The concept of “energy corridors” refers to a long area where a right-of-way exists for energy transportation projects such as power lines and pipelines. How would you describe your level of familiarity with “energy corridors” as a concept?
Base: All respondents 2023 (n=1,161)

Two-thirds of Canadians (66%) agree that Canada should further develop “energy corridors” to provide a right-of-way to bring energy from where it is produced to where it is consumed.

Canada should further develop “energy corridors”



66%
Agree

14%
Disagree

Q5. Some nations have adopted the concept of “energy corridors” as a way to help bring energy from where it is produced to where it is consumed. Those corridors provide a right-of-way for energy transportation projects such as power lines and pipelines. Some suggest Canada should further develop such energy corridors. Do you agree or disagree with this suggestion?
Base: All respondents 2023 (n=1,161)

Canada should further develop “energy corridors” by socio-demographic group

	Total	Age			Gender		Region					
		18-34	35-54	55+	Male	Female	British Columbia	Alberta	Prairies	Ontario	Quebec	Atlantic
		A	B	C	D	E	F	G	H	I	J	K
Respondents	**n=1161**	**320**	**397**	**444**	**562**	**599**	**128**	**115**	**66**	**385**	**403**	**64**
Agree (Strongly/somewhat)	66%	72% BC	63%	64%	74% E	59%	63%	73% J	71%	67%	63%	65%
Disagree (Strongly/somewhat)	14%	15%	17% C	11%	13%	15%	16%	12%	15%	12%	17% I	19%

Q5. Some nations have adopted the concept of “energy corridors” as a way to help bring energy from where it is produced to where it is consumed. Those corridors provide a right-of-way for energy transportation projects such as power lines and pipelines. Some suggest Canada should further develop such energy corridors. Do you agree or disagree with this suggestion?
Base: All respondents 2023 (n=1,161)

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Game Changers

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You act better when you are sure.

