



# Transition to a Lower-Carbon Future

Public Opinion Research  
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Field Dates: May 15, 2020 to May 20, 2020

# Transition to a Lower-Carbon Future

Prior to the COVID-19 outbreak, jobs and economic activities in the oil and gas sector had already seen a decline from their peaks in earlier years. A price war combined with a dramatic decline in demand for oil due to COVID-19 has left the sector even more distressed.

In the meantime, building on concern over climate, attention has been growing around proposals for a transition to a lower-carbon future.

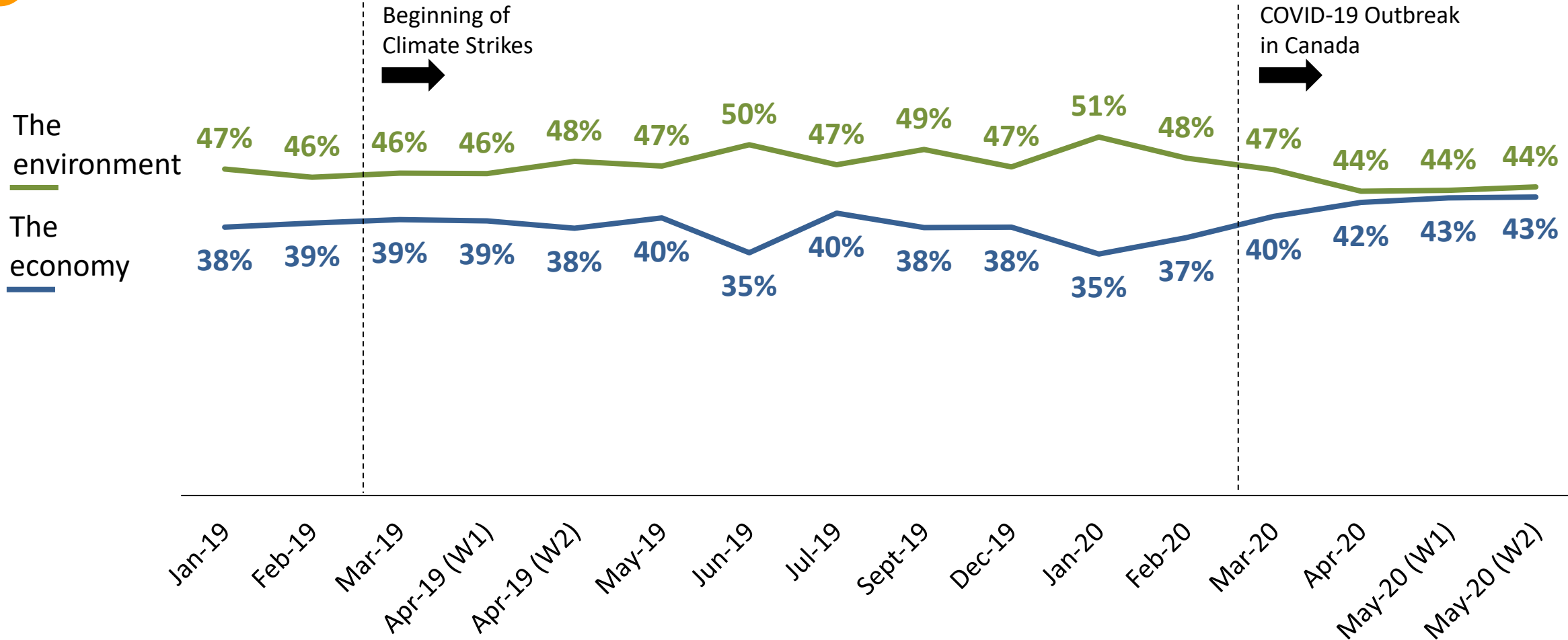
Today, INNOVATIVE is releasing results that track key attitudes on the idea of energy transition away from the oil and gas sector. It also covers public perceptions of the federal government's response to the oil and gas sector.

These results are from the latest wave of INNOVATIVE's COVID-19 tracking surveys. This online survey was in field from May 15<sup>th</sup> to May 20<sup>th</sup> with a weighted sample size of 1,500 Canadian residents and oversamples in the 8 largest provinces. Detailed methodology is provided in the appendix.

Canadians are evenly split between the importance of the economy and the environment.

# More said the environment was more important than the economy last year. But in the gap has narrowed in the last few months.

Q When it comes to trade-offs between [rotate] the economy and the environment, which is more important to you:  
[asked of all respondents]



Canadians are growing more familiar with the idea of energy transition.

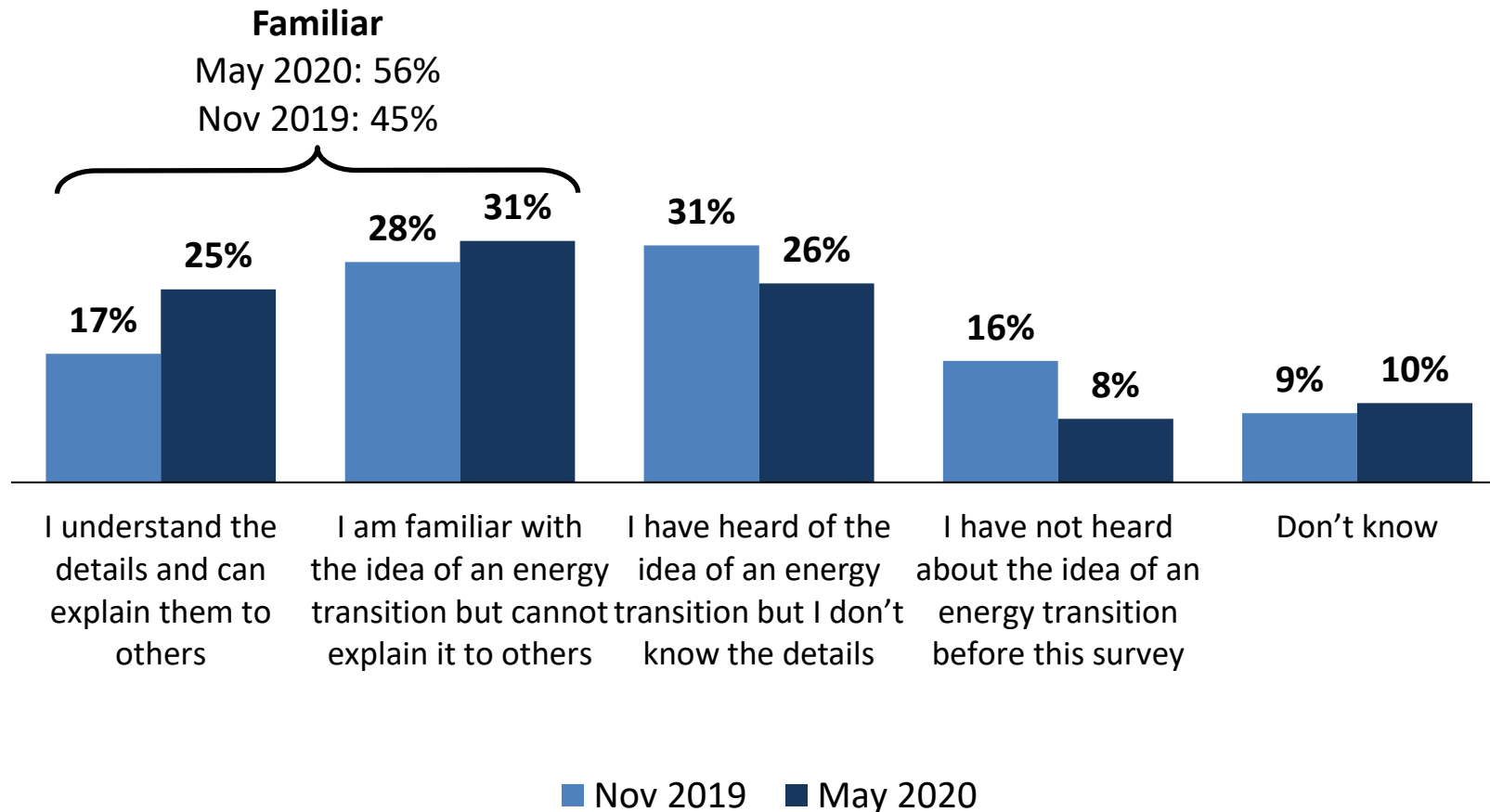
# More are familiar with the idea of energy transition than before the COVID-19 outbreak in Nov 2019, highest among Albertans



One issue people have been talking about lately is the idea that Canada and the world may be transitioning from its current energy system that depends highly on carbon-based fossil fuels like coal, oil and gas to a lower-carbon energy system.

How familiar are you with the idea of transitioning from its current energy system that depends highly on carbon-based fuels to a lower-carbon energy system?

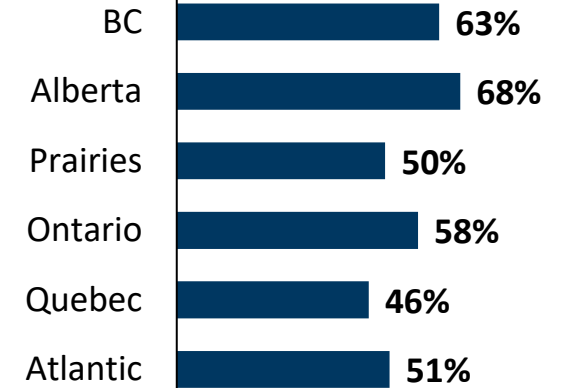
[asked of all respondents]



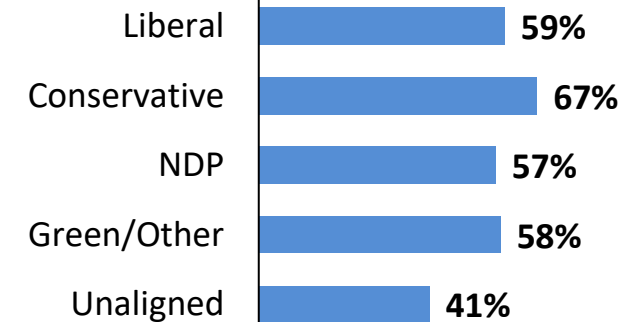
## Sample Breakdown

Those who say they "familiar"

### Region



### Party ID



Compared to last November, Canadians are less likely to hold pro-transition attitudes and more likely to hold pro-oil views.

# Exploring Energy Transition Attitudes

Earlier we show the results of a simple environment vs. economy trade-off question. It is interesting because it shows the trend on a choice between values. However, for most people, the issue of an energy transition away from fossil fuels is more complex. Some Canadians agree with positions from both sides of the debate.

In this survey, we asked respondents to agree or disagree with three oil-friendly statements and three transition-friendly statements.

Pro-Oil Statements	Pro-Transition Statements
It is critical to Canada's ongoing prosperity that we responsibly develop and export our oil and gas resources.	Fossil fuels should be phased out as quickly as possible to speed up the shift to a lower-carbon future even if it means job losses or paying more for energy.
Canada is one of the most responsible countries in the world when it comes to how we develop and export our oil and gas resources.	The world is facing a climate emergency and it is irresponsible of Canada to add to the problem by developing new oil and gas projects.
It makes no sense to leave Canada's oil and gas in the ground because if Canada doesn't meet the global demand, another country will.	Because of the low price of oil, it doesn't make any sense to continue investing in oil and gas in Canada.

We then grouped respondents based on whether they tended to hold more pro-oil views, more pro-transition views, a mix of views or whether they were generally on the fence.

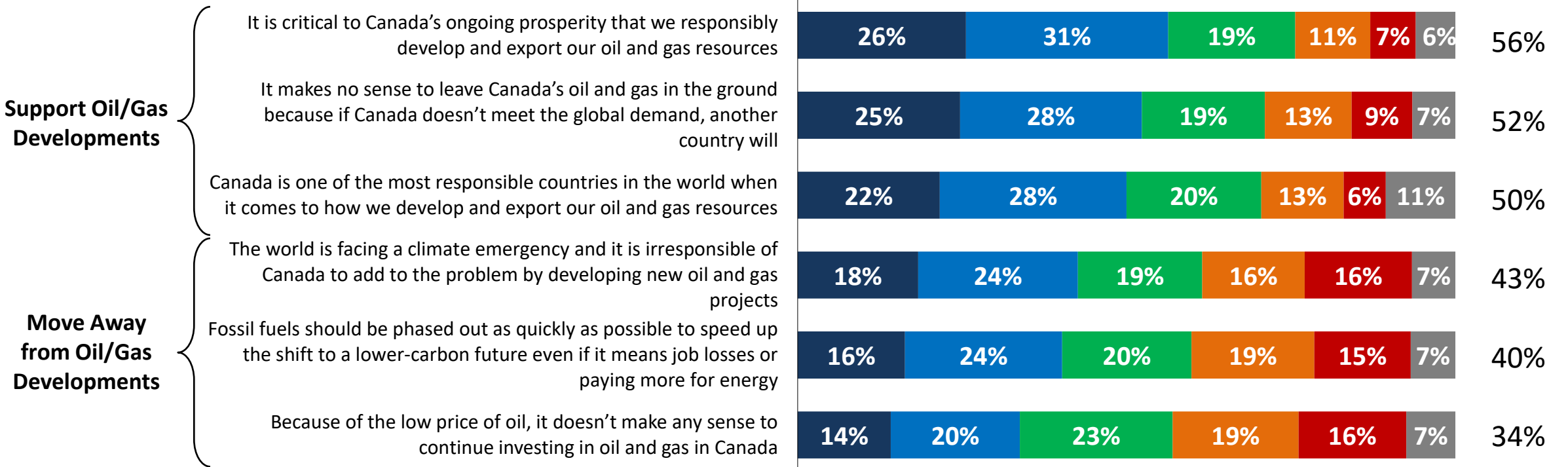


# Key Attitudes: Majorities support pro-oil statements, pro-transition statements enjoy less support

To fully understand Canadians' attitudes towards oil/gas developments, we ask respondents to react to a series of agree and disagree statements on energy transition from a wide range of perspectives.

Based on their responses, we would then group respondents who share similar attitudes into groups for further analysis.

**Q** Do you agree or disagree with the following statements?  
[asked of all respondents]



■ Strongly agree     
 ■ Somewhat agree     
 ■ Neither agree nor disagree  
■ Somewhat disagree     
 ■ Strongly disagree     
 ■ Don't know

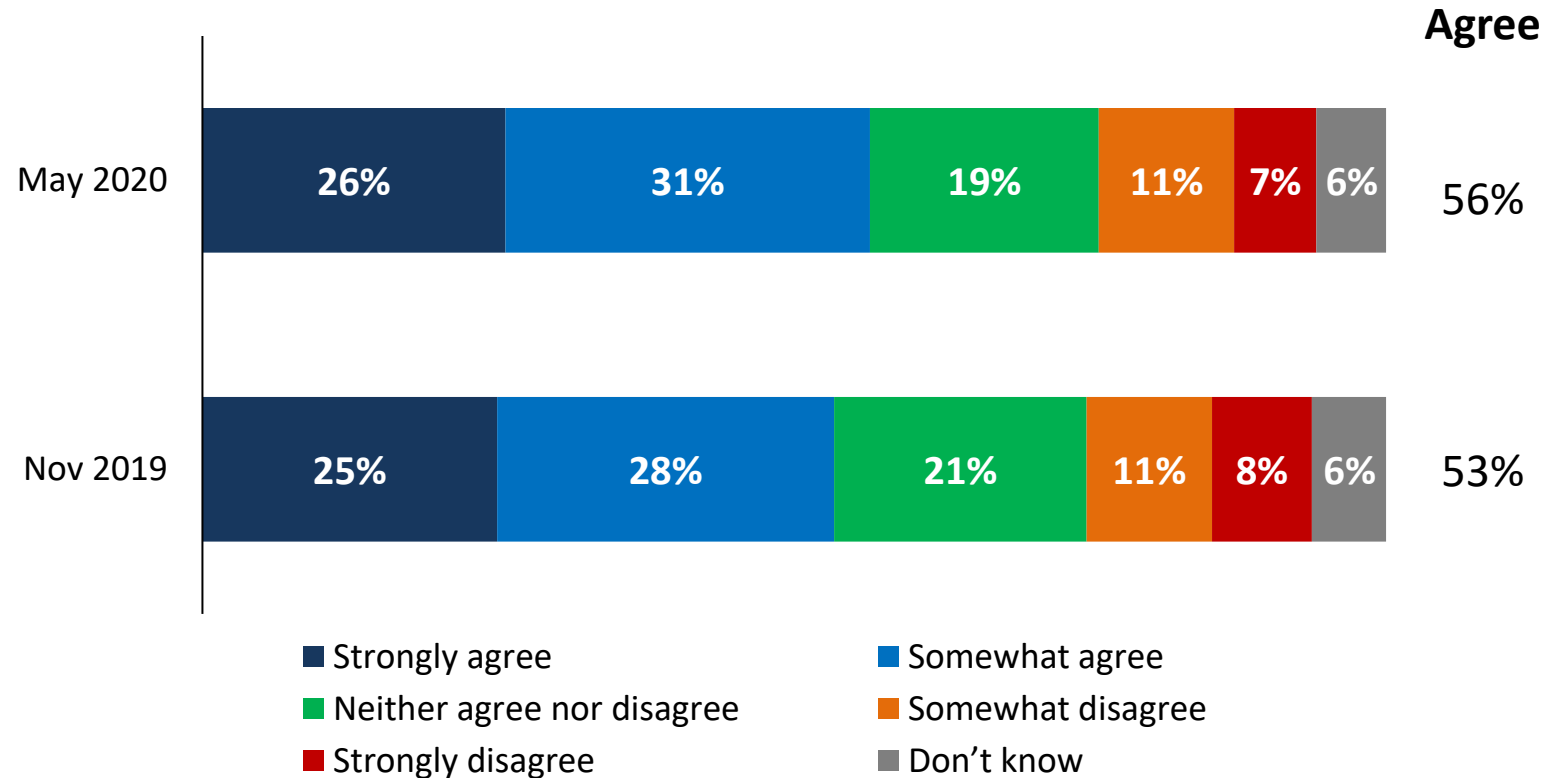


# Ongoing Prosperity: Majority (56%) feel it is critical to develop oil and gas, highest among Albertans (75%) and CPC partisans (81%)



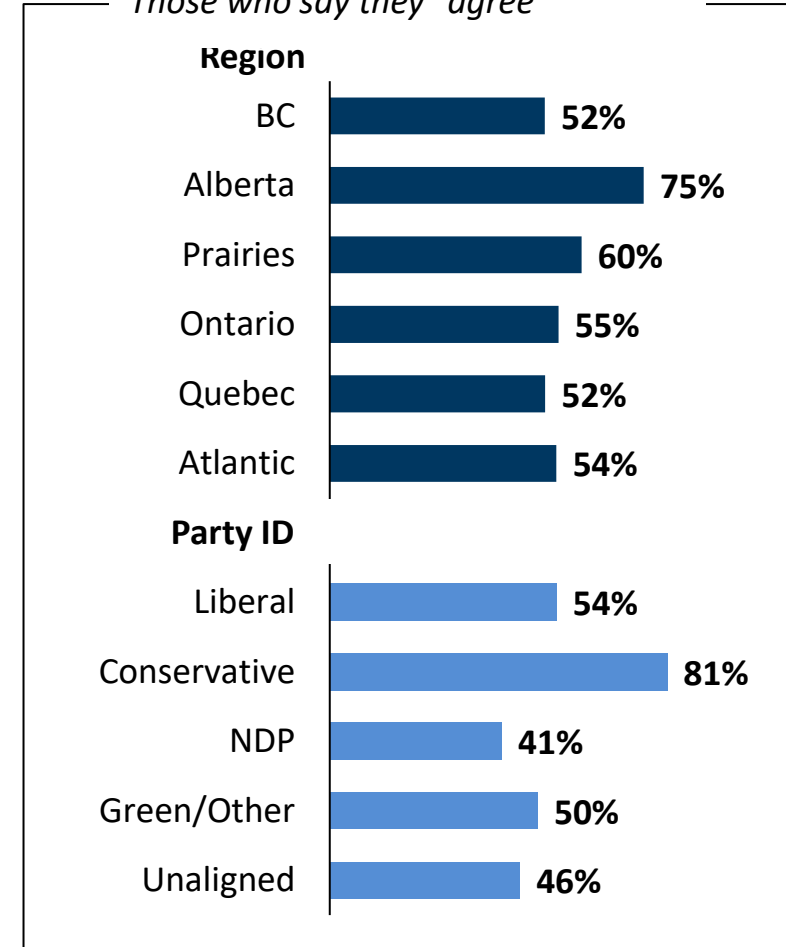
Do you agree or disagree with the following statements?  
[asked of all respondents]

**It is critical to Canada's ongoing prosperity that we responsibly develop and export our oil and gas resources**



## Sample Breakdown (current wave)

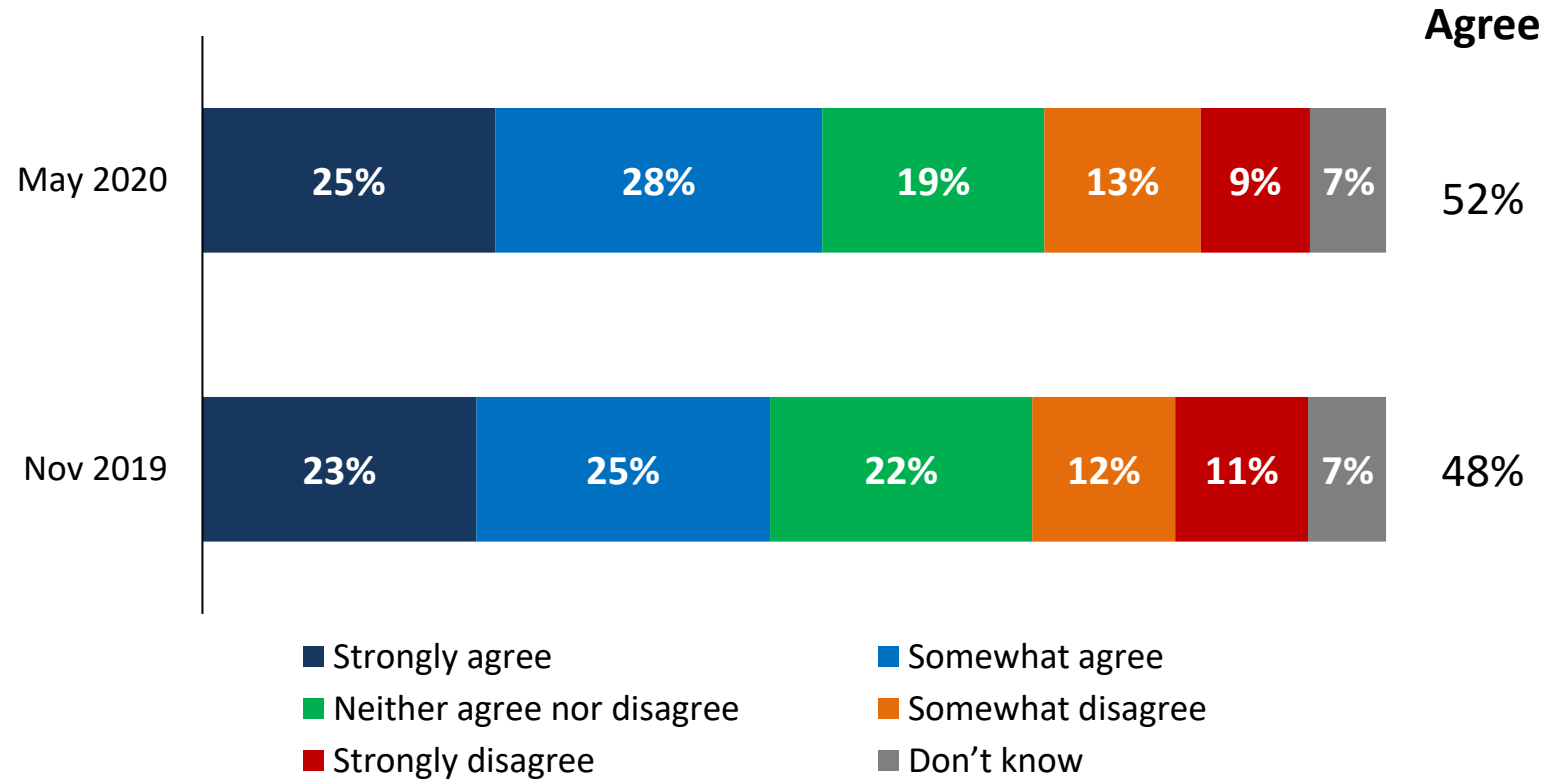
Those who say they "agree"



# Shouldn't Leave Oil/Gas in the Ground: Half (53%) agree it makes no sense to leave resources undeveloped; up directionally from Nov 2019

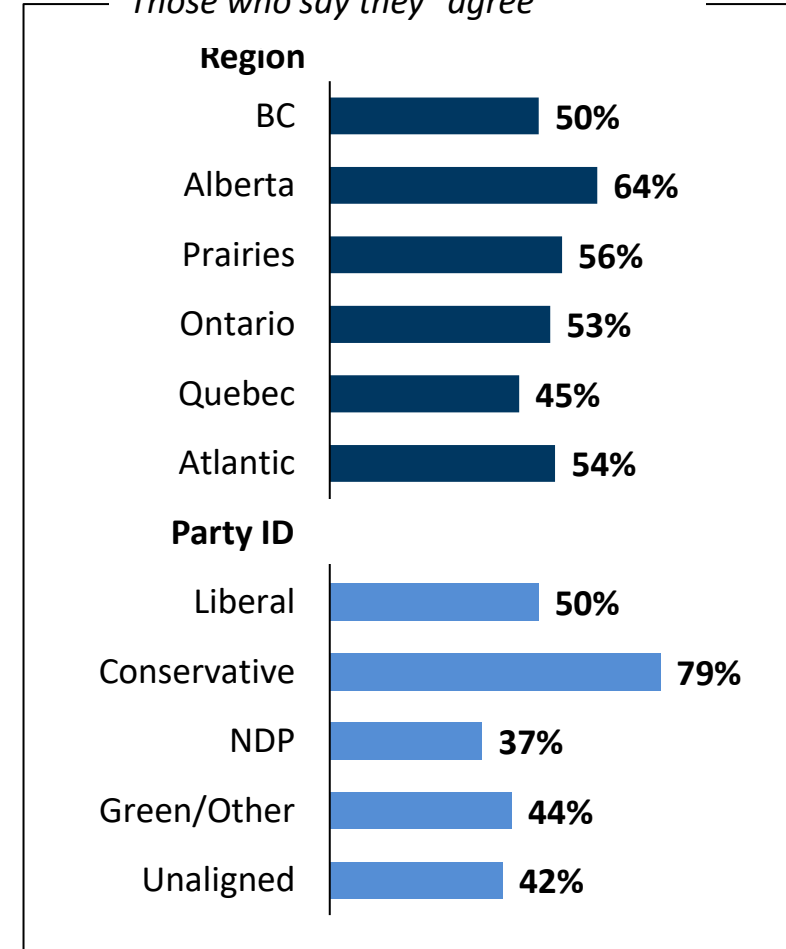
**Q** Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements.  
[asked of all respondents]

**It makes no sense to leave Canada's oil and gas in the ground because if Canada doesn't meet the global demand, another country will**



## Sample Breakdown (current wave)

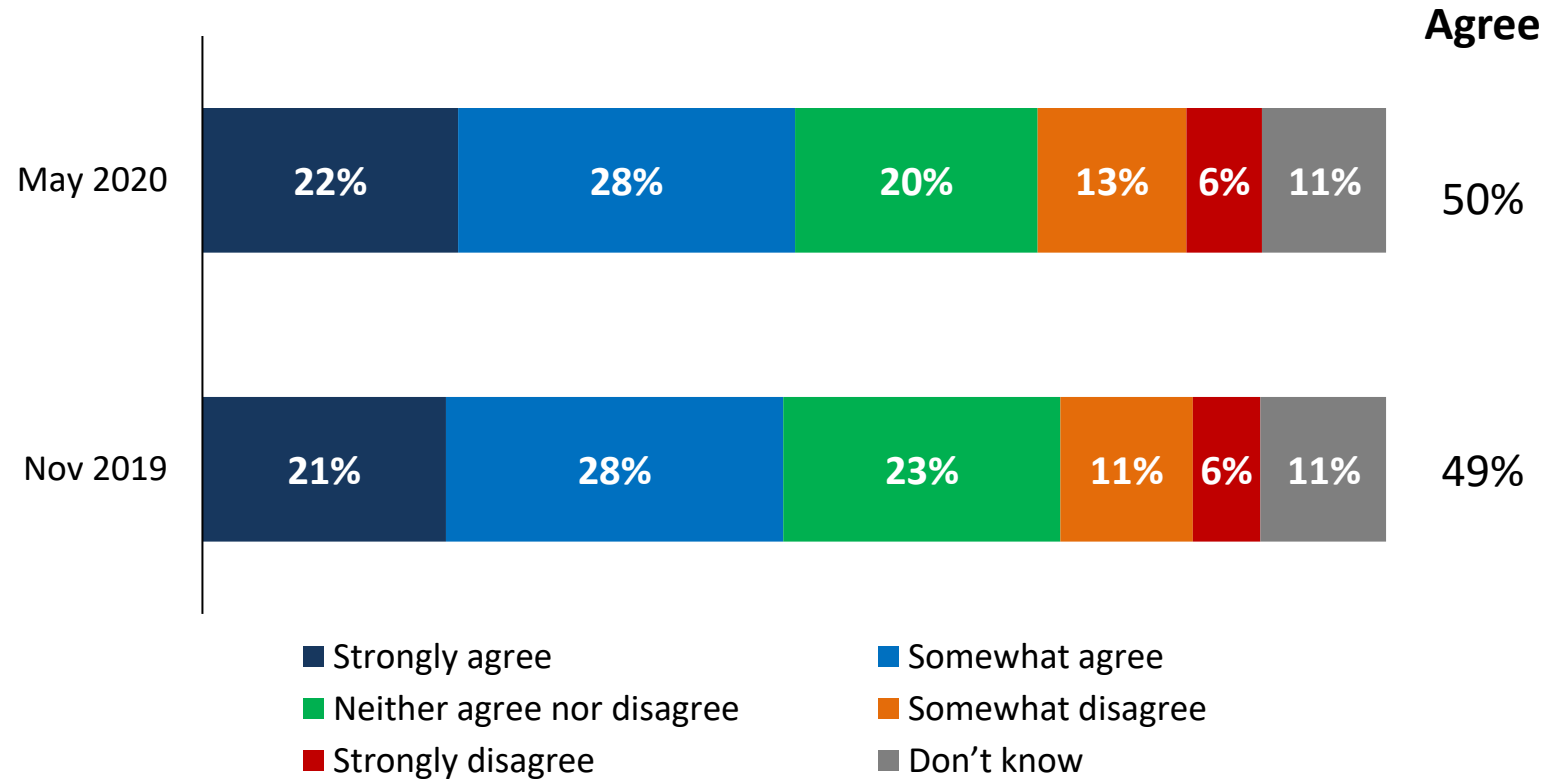
Those who say they "agree"



# As a Responsible Country: Half (50%) feel Canada is responsible when it comes to developing resources, highest incidence among Albertans

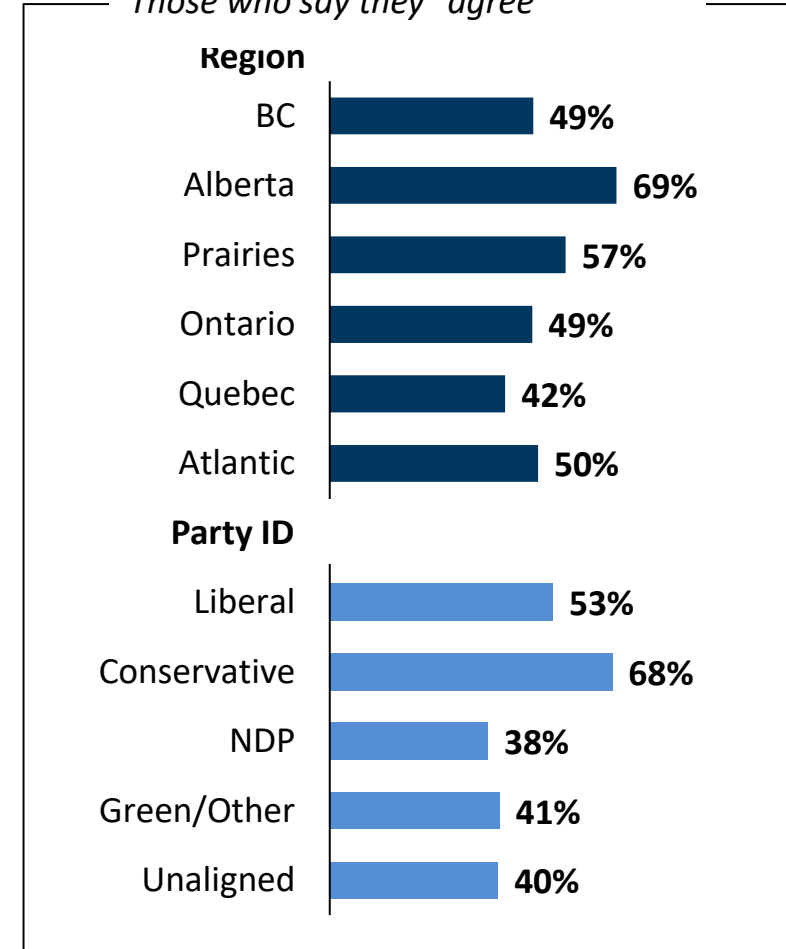
**Q** Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements.  
[asked of all respondents]

**Canada is one of the most responsible countries in the world when it comes to how we develop and export our oil and gas resources**



## Sample Breakdown (current wave)

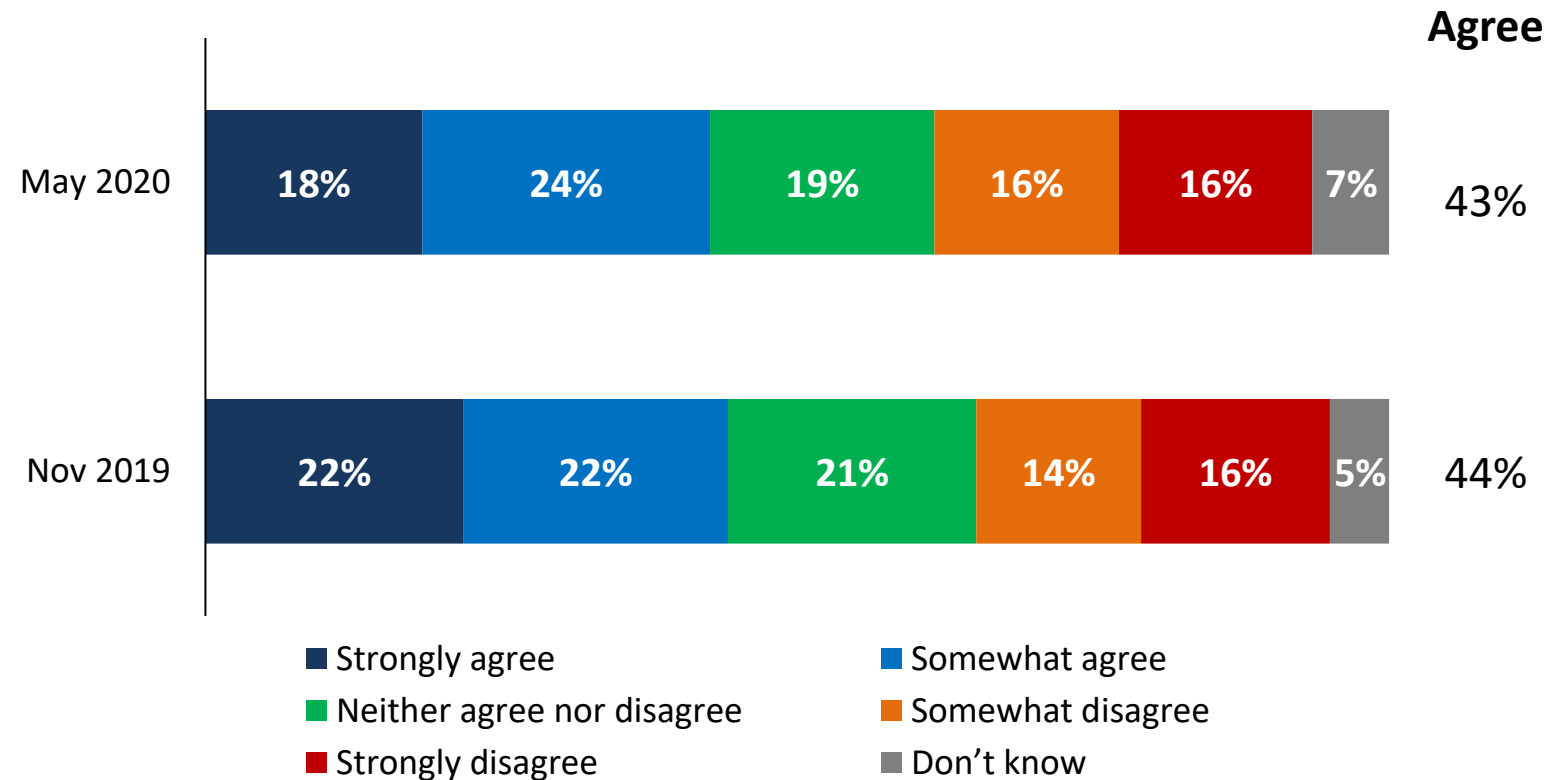
Those who say they "agree"



# Irresponsible to Develop Oil/Gas: 43% feel it is irresponsible to develop new oil and gas projects; two-thirds (66%) of NDP-ers agree

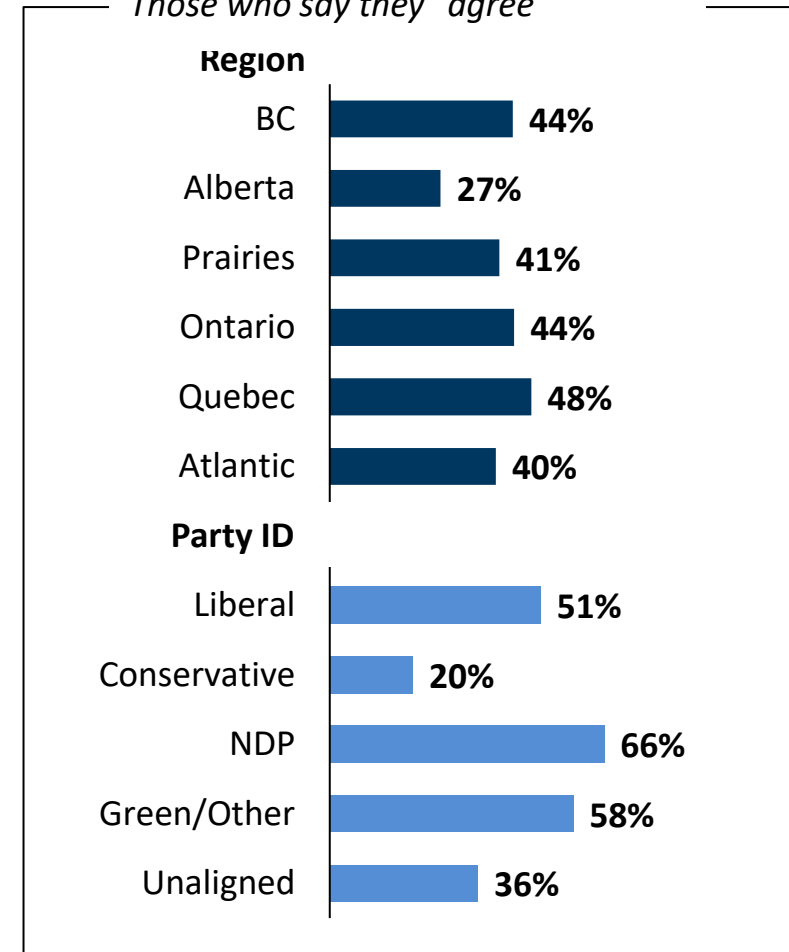
**Q** Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements.  
[asked of all respondents]

**The world is facing a climate emergency and it is irresponsible of Canada to add to the problem by developing new oil and gas projects**



## Sample Breakdown (current wave)

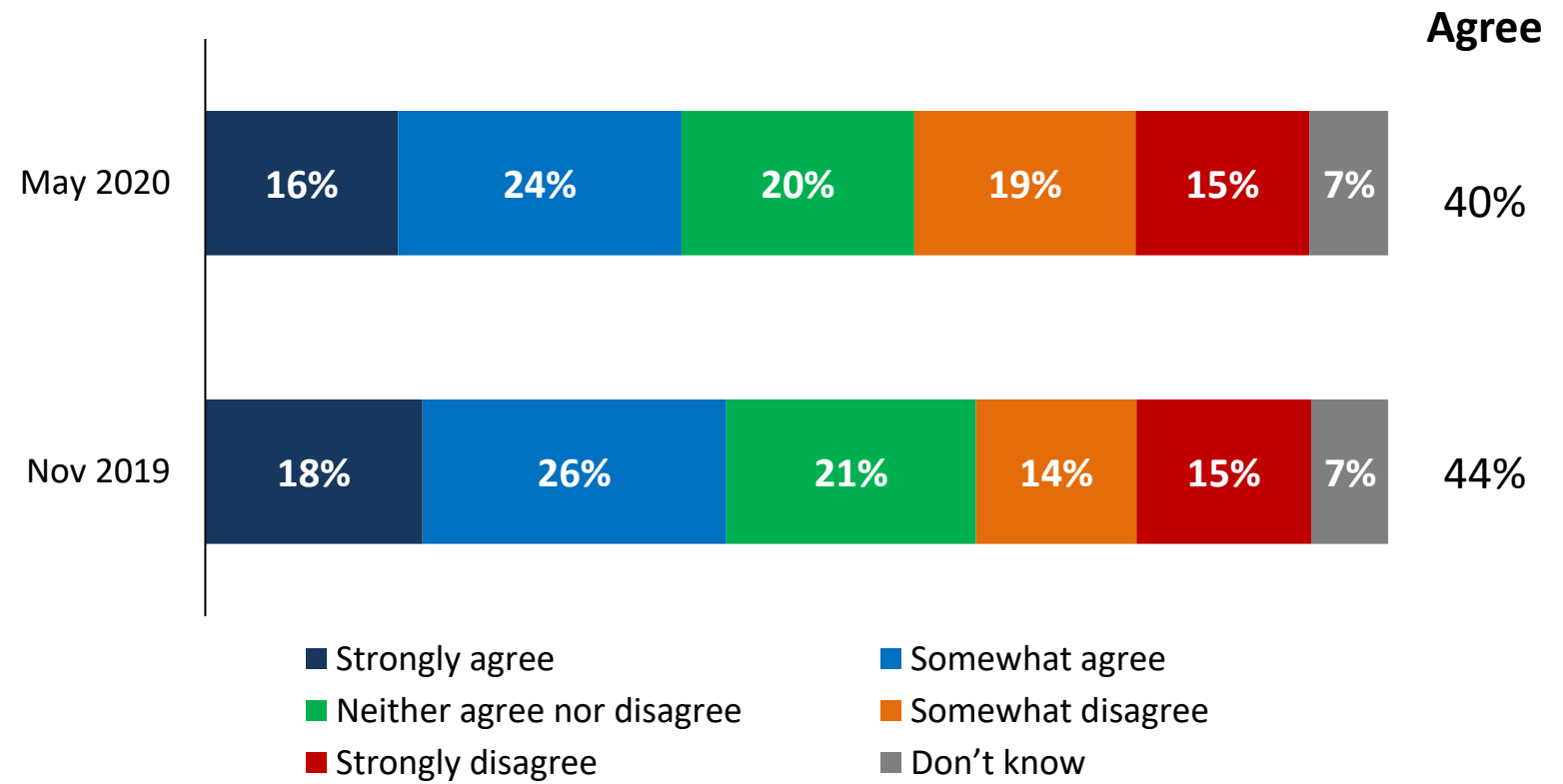
Those who say they "agree"



# Quickly Phase out Fossil Fuels: Plurality (40%) feel fossil fuels should be phased out quickly; down 4 pts from Nov 2019; highest among NDP-ers

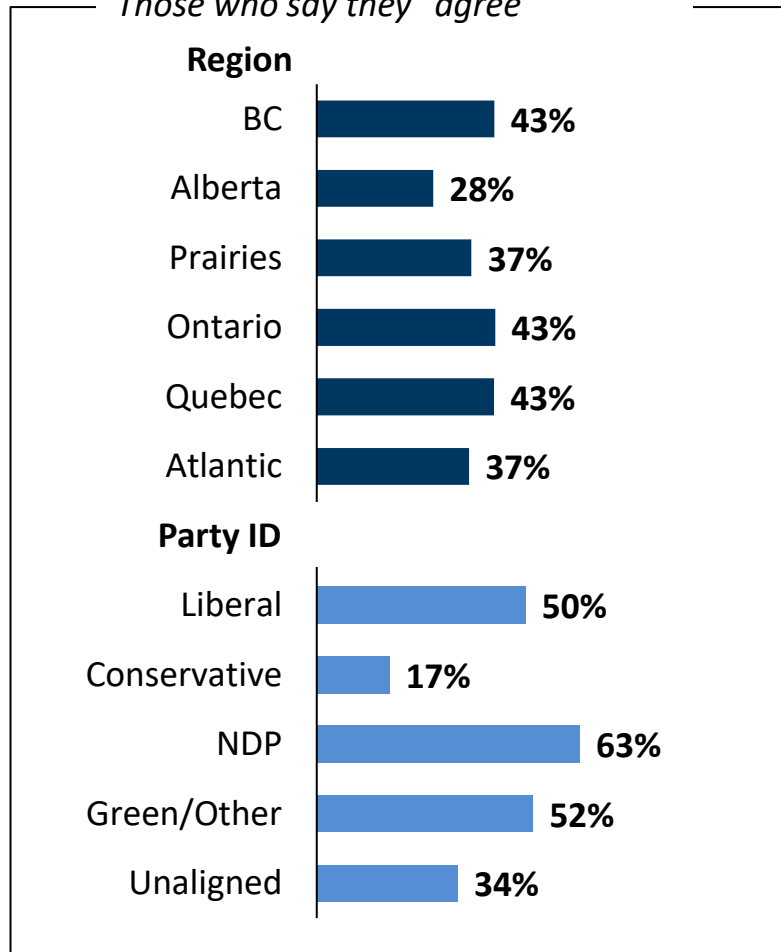
**Q** Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements.  
[asked of all respondents]

**Fossil fuels should be phased out as quickly as possible to speed up the shift to a lower-carbon future even if it means job losses or paying more for energy**



## Sample Breakdown (current wave)

Those who say they "agree"



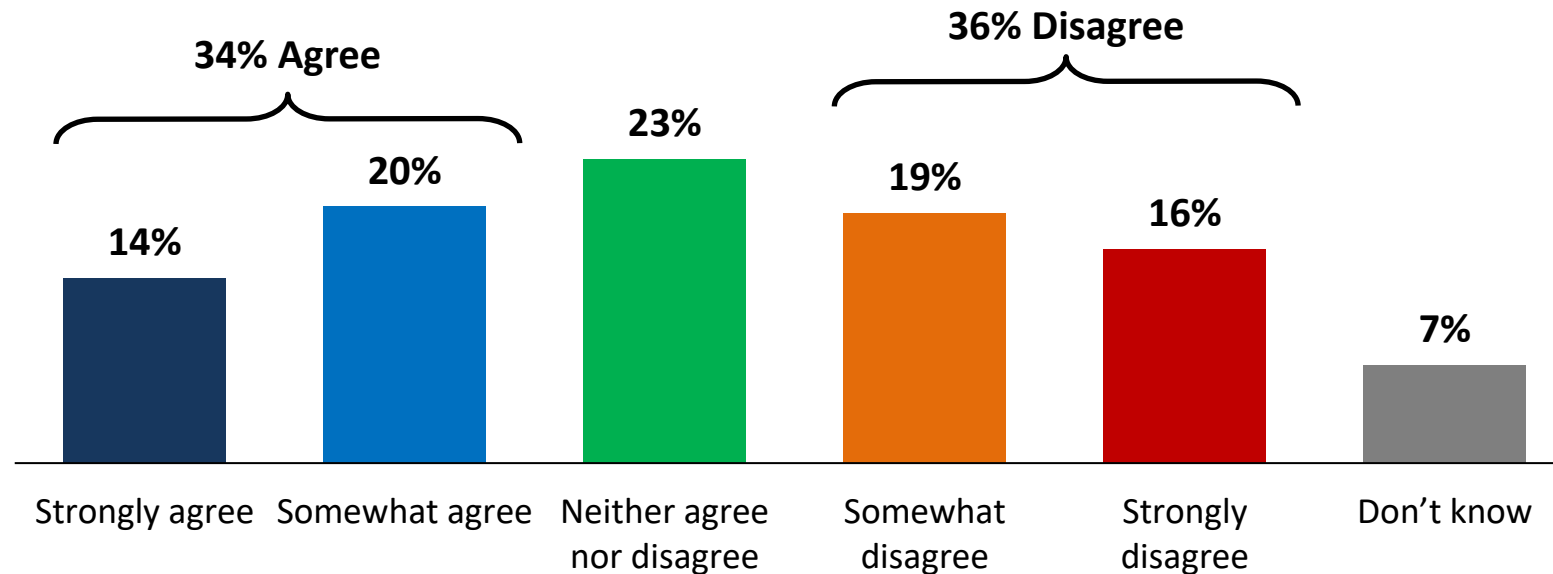
# Make No Sense to Invest in Oil/Gas: Canadians are split on whether it makes sense to continue investing in oil/gas due to low price of oil



Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements.

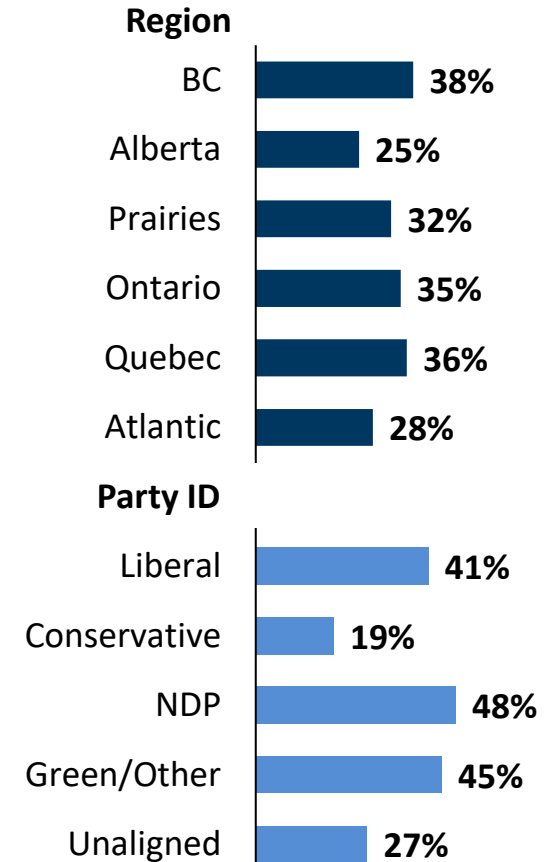
[asked of all respondents]

**Because of the low price of oil, it doesn't make any sense to continue investing in oil and gas in Canada**



## Sample Breakdown

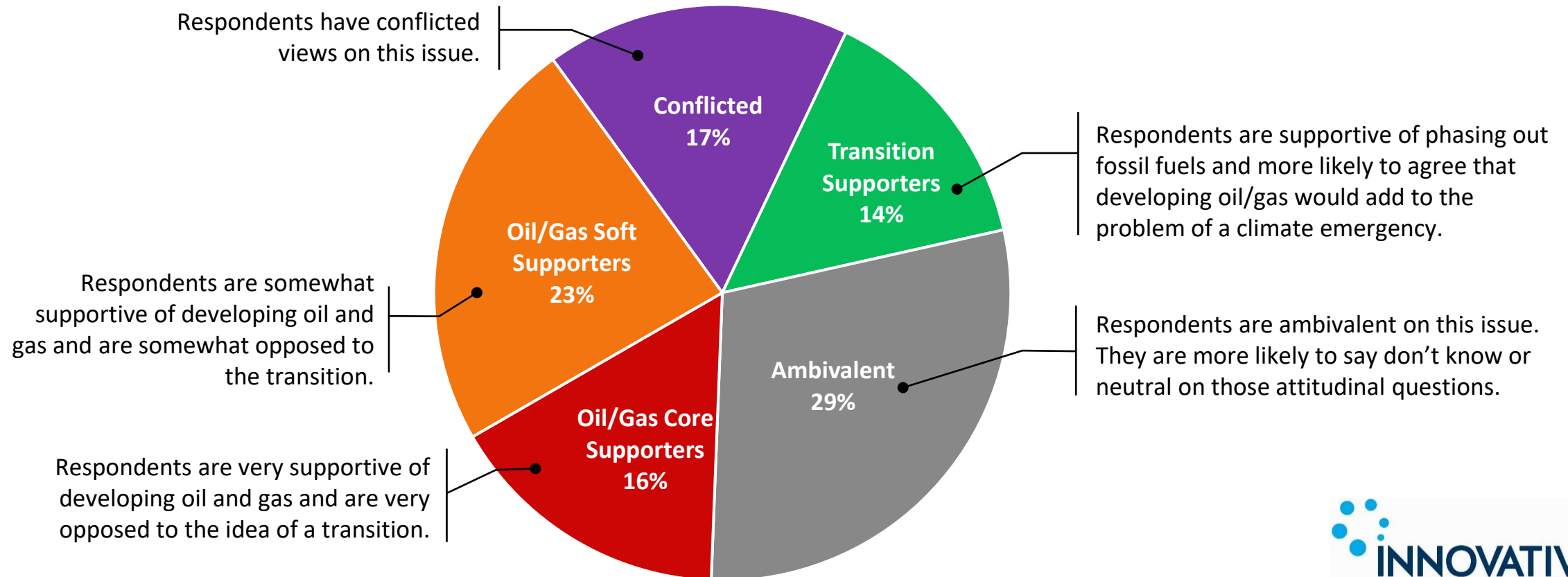
Those who say they "agree"



# Transition Cluster: Oil/Gas Supporters (Core + Soft: 39%) are close to three times as large as Transition Supporters (14%)

Based on the respondents' attitudes towards oil/gas developments, we have grouped respondents who share similar attitudes towards the transition into five clusters. In doing so, we can better understand the motivations of the population.

A new question of Agree/Disagree: "Because of the low price of oil, it doesn't make any sense to continue investing in oil and gas in Canada" is included in the creation of this wave's cluster. Even though it was not asked in November 2019, this question captures the sentiment of the new developments in the public debate. As such, it's included in the creation of the cluster.





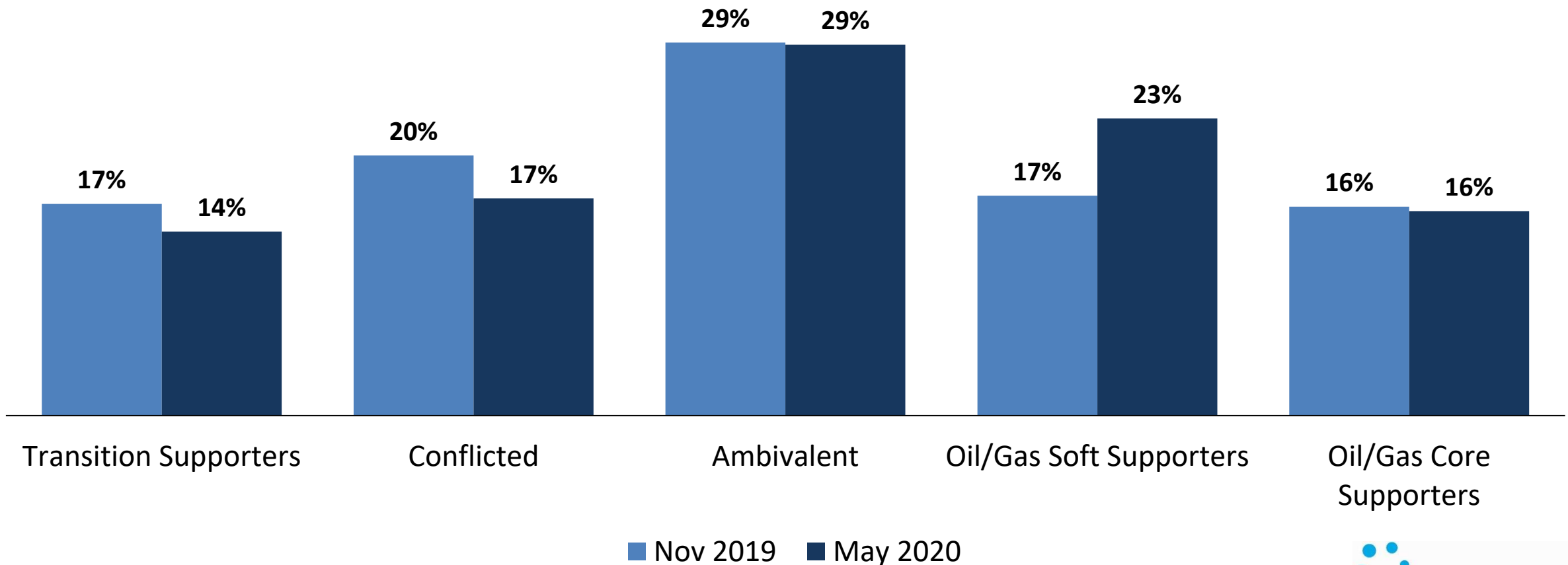
# Defining the Transition Clusters

Based on the respondents' attitudes towards oil/gas developments, we have grouped respondents who share similar attitudes towards the transition into five clusters. The table below shows where each segment stands on the key attitudes used to create the clusters. The table uses net agree which subtracts disagreement from agreement in each statement. Strong net positive scores indicate more people in the segment agree with the statement. Strong net negative scores mean more people disagree.

	Net Agreement	Transition Supporters	Conflicted	Ambivalent	Oil/Gas Soft Supporters	Oil/Gas Core Supporters
Support Oil/Gas Developments	Develop oil/gas for ongoing prosperity	-79%	+79%	+6%	+78%	+99%
	Shouldn't leave oil/gas in the ground	-88%	+75%	-8%	+72%	+95%
	We develop oil/gas responsibly	-52%	+71%	-1%	+56%	+86%
Move Away from Oil/Gas Developments	Irresponsible to develop oil/gas	+98%	+81%	+33%	-49%	-97%
	Quickly phase out fossil fuels	+96%	+79%	+16%	-43%	-95%
	Make no sense to invest in oil/gas	+86%	+62%	+8%	-54%	-90%

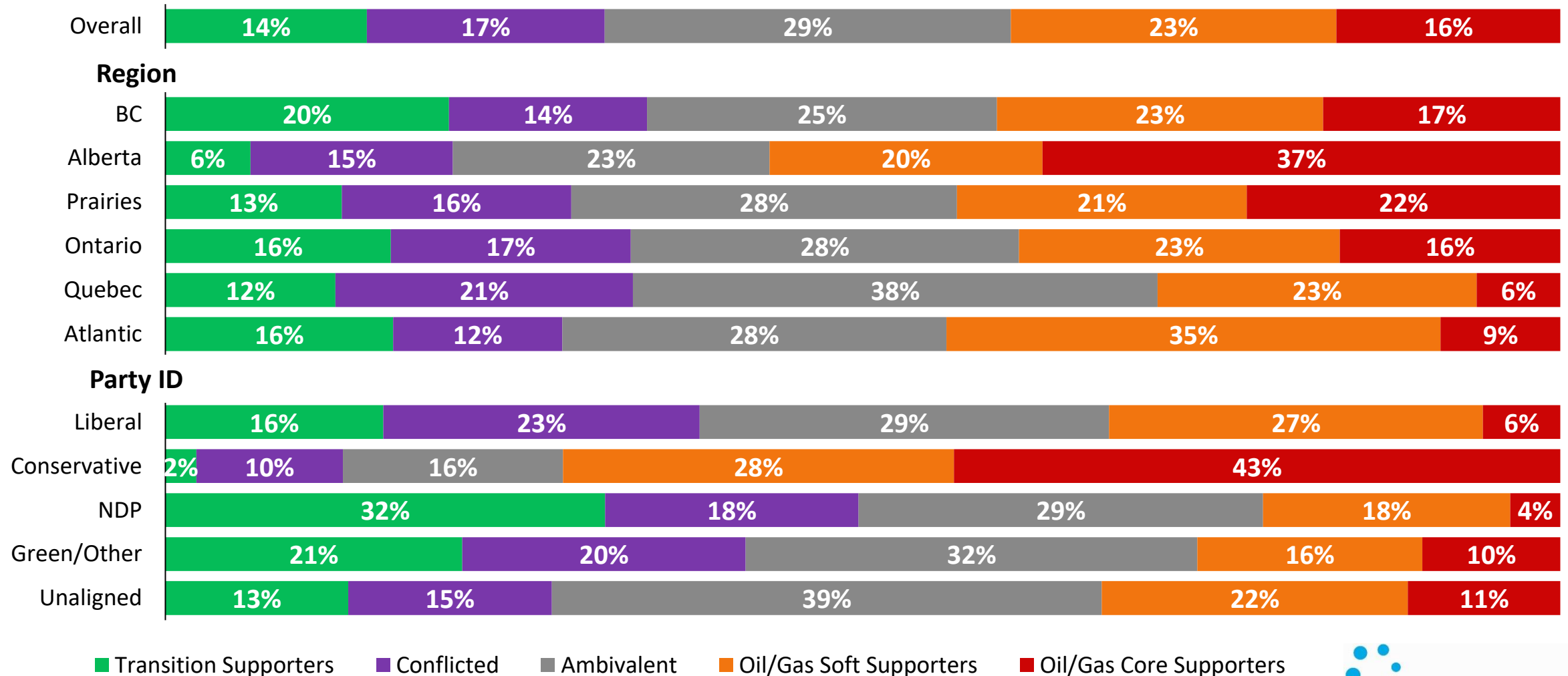
# Transition Cluster Tracking: There is a directional increase in Oil/Gas Soft Supporters and a small decrease in Transition Supporters

## Transition Cluster Tracking



# Profiling Transition Cluster: Transition Supporters are concentrated among NDP partisans and highest regionally in BC

Transition Cluster by Region and Party ID



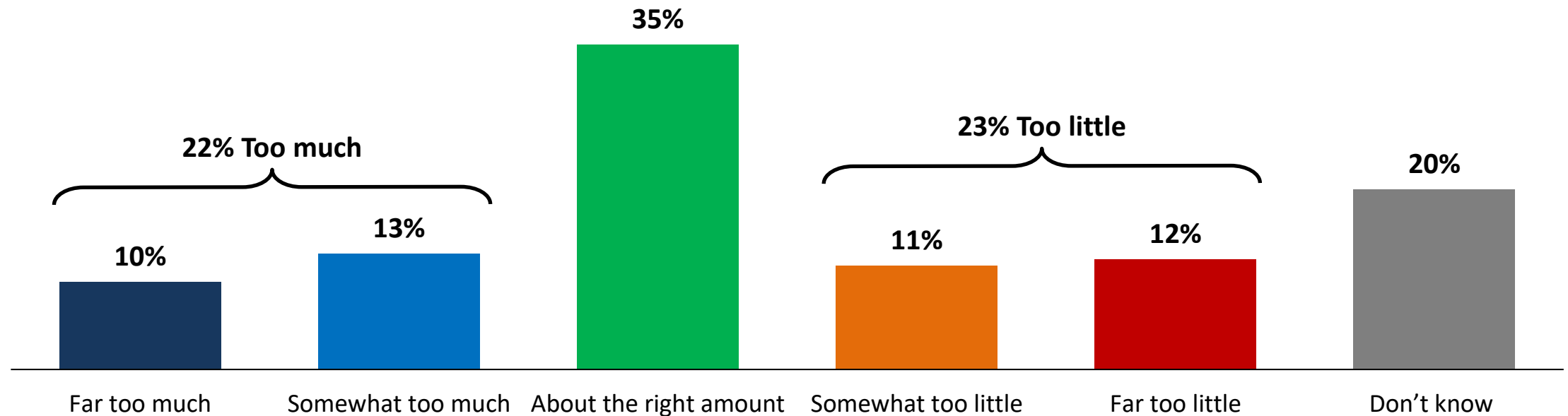
Currently, Canadians tend to see the government as having found the right balance in its support for the oil and gas sector

# Government Response: Based on the current debate, a third (35%) say the government's support to the oil and gas sector is just about right



Based on what you've read, seen, or heard do you think the federal government is doing too much, too little, or the right amount to support the oil and gas sector during the COVID-19 outbreak?

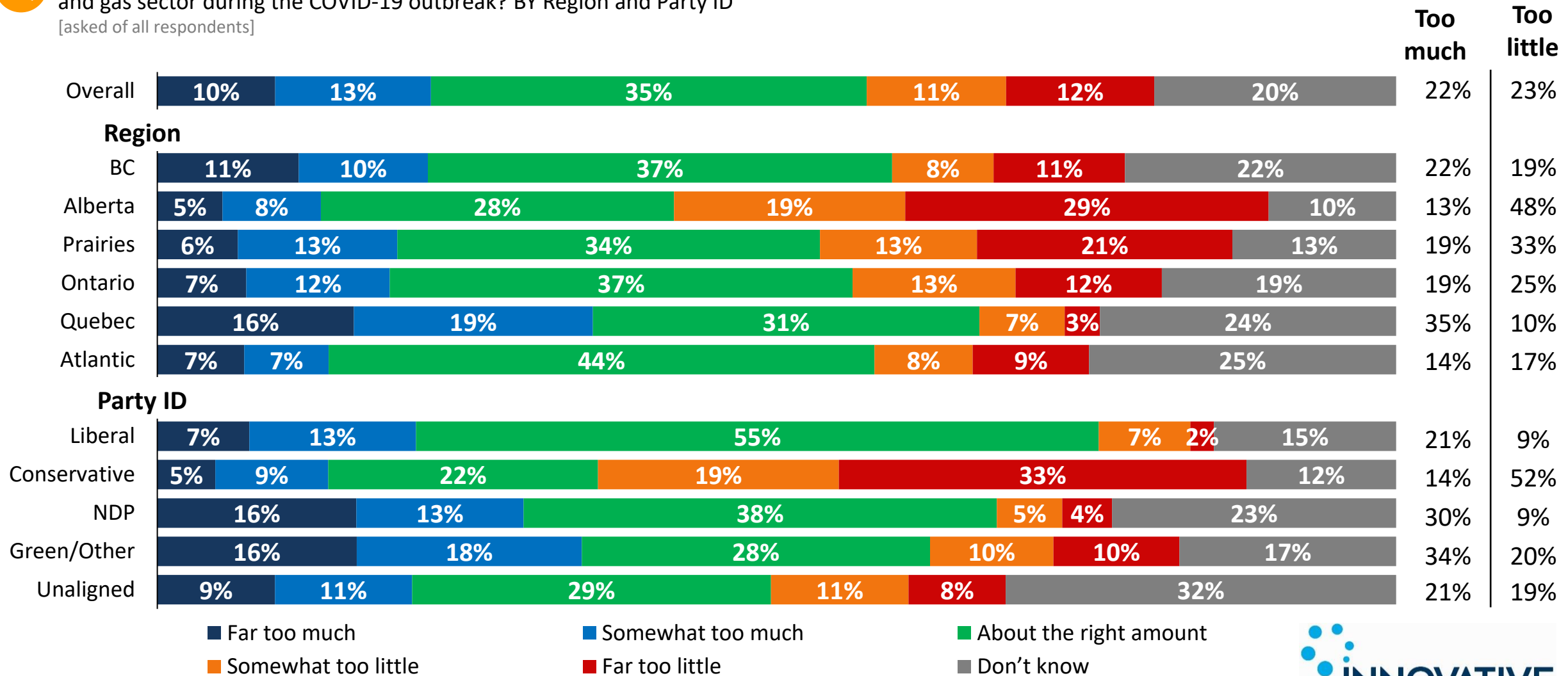
[asked of all respondents]



# Regionally, Quebec is more likely to say the gov't is doing "too much", Albertans are more likely to say "too little"



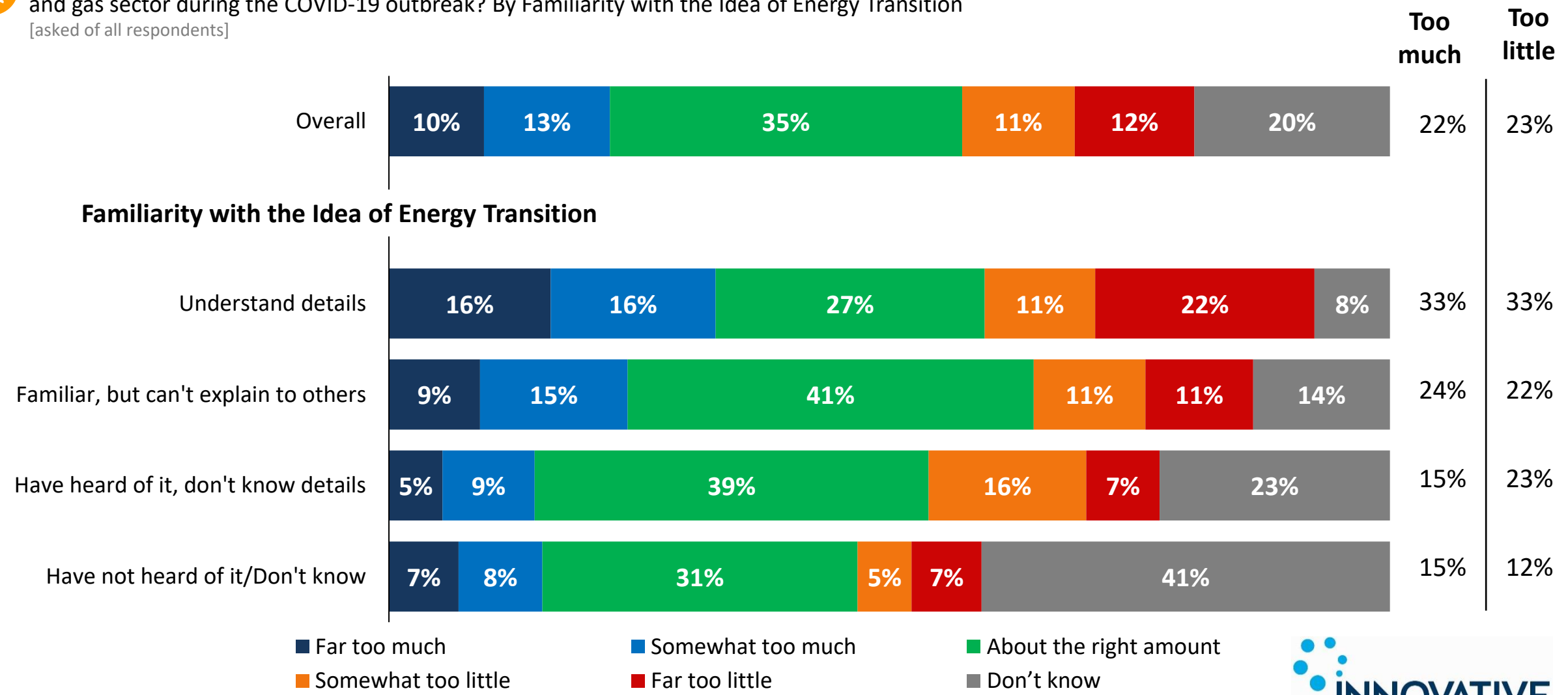
Based on what you've read, seen, or heard do you think the federal government is doing too much, too little, or the right amount to support the oil and gas sector during the COVID-19 outbreak? BY Region and Party ID  
[asked of all respondents]



# Those who are familiar with the concept of energy transition are more divided on whether the government is doing too much or too little



Based on what you've read, seen, or heard do you think the federal government is doing too much, too little, or the right amount to support the oil and gas sector during the COVID-19 outbreak? By Familiarity with the Idea of Energy Transition  
[asked of all respondents]



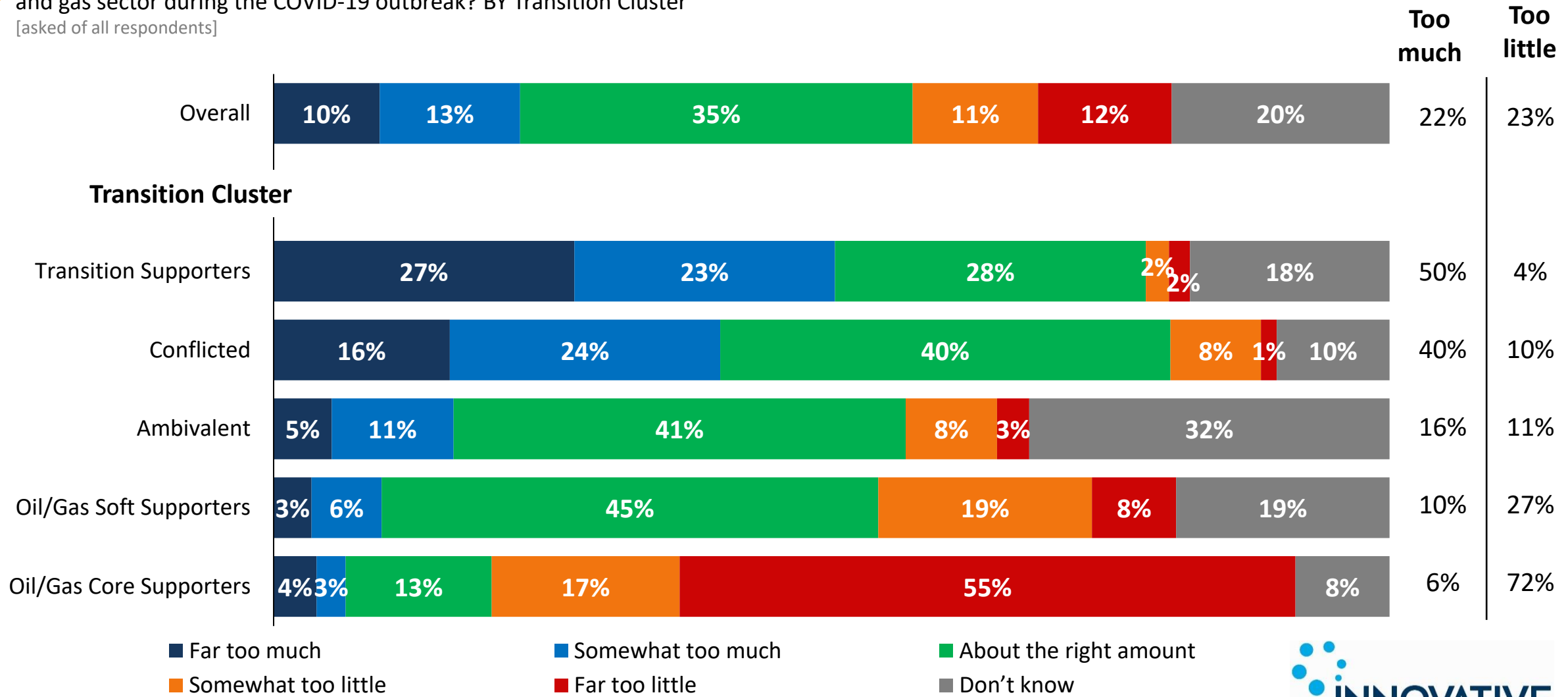
■ Far too much     
 ■ Somewhat too much     
 ■ About the right amount  
■ Somewhat too little     
 ■ Far too little     
 ■ Don't know



# Those who are conflicted on energy transition tend to say the government is providing the right amount of support or too much



Based on what you've read, seen, or heard do you think the federal government is doing too much, too little, or the right amount to support the oil and gas sector during the COVID-19 outbreak? BY Transition Cluster  
[asked of all respondents]





# Methodology

The background of the slide is a solid dark blue color. It features several faint, light blue circles of varying sizes scattered across the surface, creating a subtle pattern.

# Survey Methodology

These are the results of an online survey conducted between May 15<sup>th</sup> and May 20<sup>th</sup>, 2020.

**Method:** This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online sample. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.

**Sample Size:** n=2,266 general population, 18 years or older. The results are weighted to n=1,500 based on Census data from Statistics Canada.

**Field Dates:** May 15<sup>th</sup> to May 20<sup>th</sup>, 2020.

**Weighting:** Results for Canada are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

**Margin of Error:** This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

**Note:** Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
<b>Males 18-34</b>	226	10.0%	206	13.8%
<b>Males 35-54</b>	257	11.3%	251	16.7%
<b>Males 55+</b>	688	30.4%	272	18.1%
<b>Females 18-34</b>	247	10.9%	204	13.6%
<b>Females 35-54</b>	310	13.7%	260	17.4%
<b>Females 55+</b>	538	23.7%	307	20.4%
<b>Region</b>				
<b>BC</b>	431	19.0%	204	13.6%
<b>Alberta</b>	336	14.8%	170	11.3%
<b>Prairies</b>	113	5.0%	100	6.7%
<b>Ontario</b>	880	38.8%	573	38.2%
<b>Quebec</b>	368	16.2%	350	23.3%
<b>Atlantic</b>	138	6.1%	102	6.8%



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**Building Understanding.**