



Energy Transition

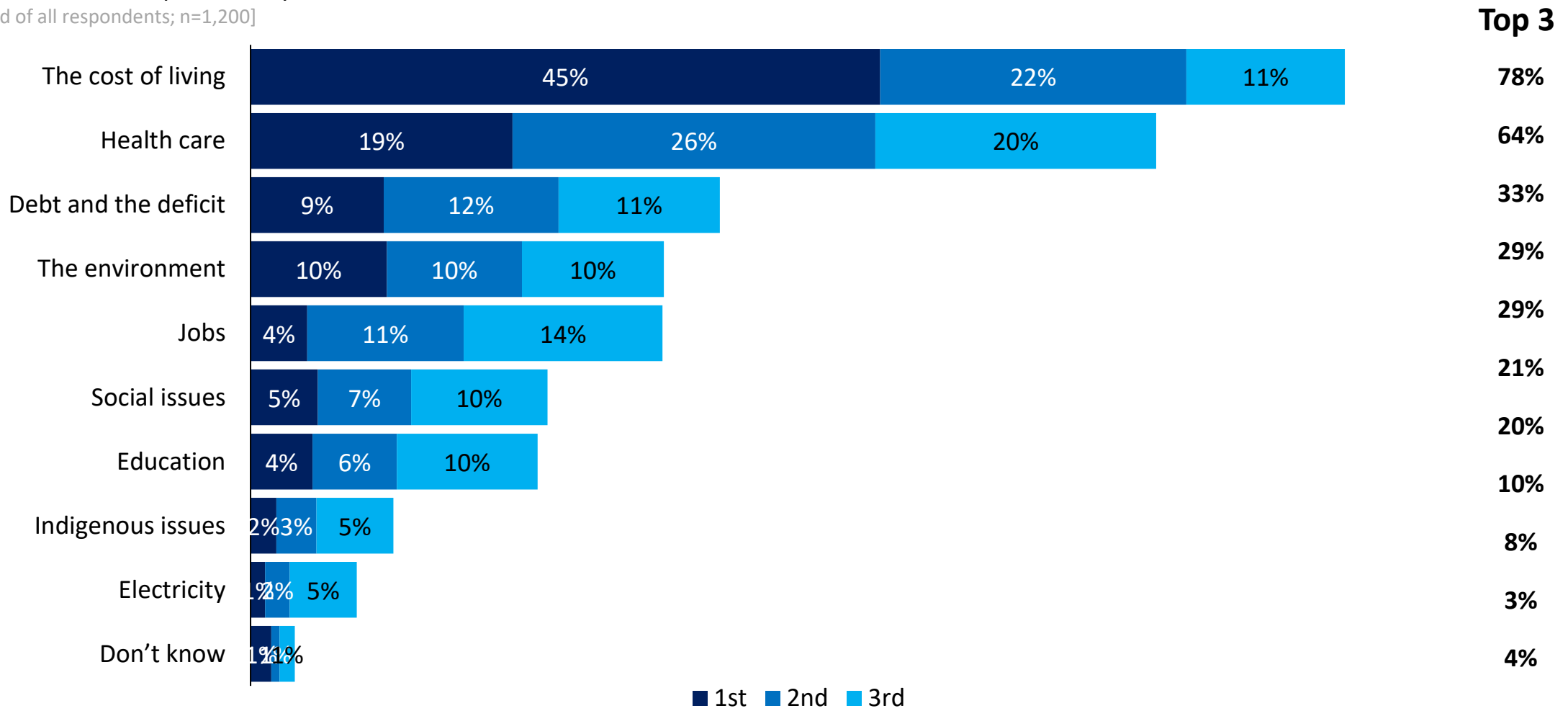
Public Opinion Research
Release Date: May 24, 2022
Field Dates: March 4, 2022, to March 15, 2022

Most Important Issue: The cost of living is the top issue in Canada with nearly half saying it is the single most important issue



Which of the following issues is the most important issue to you? And which of these issues is the next most important to you? And which of these issues is the next most important to you?

[asked of all respondents; n=1,200]

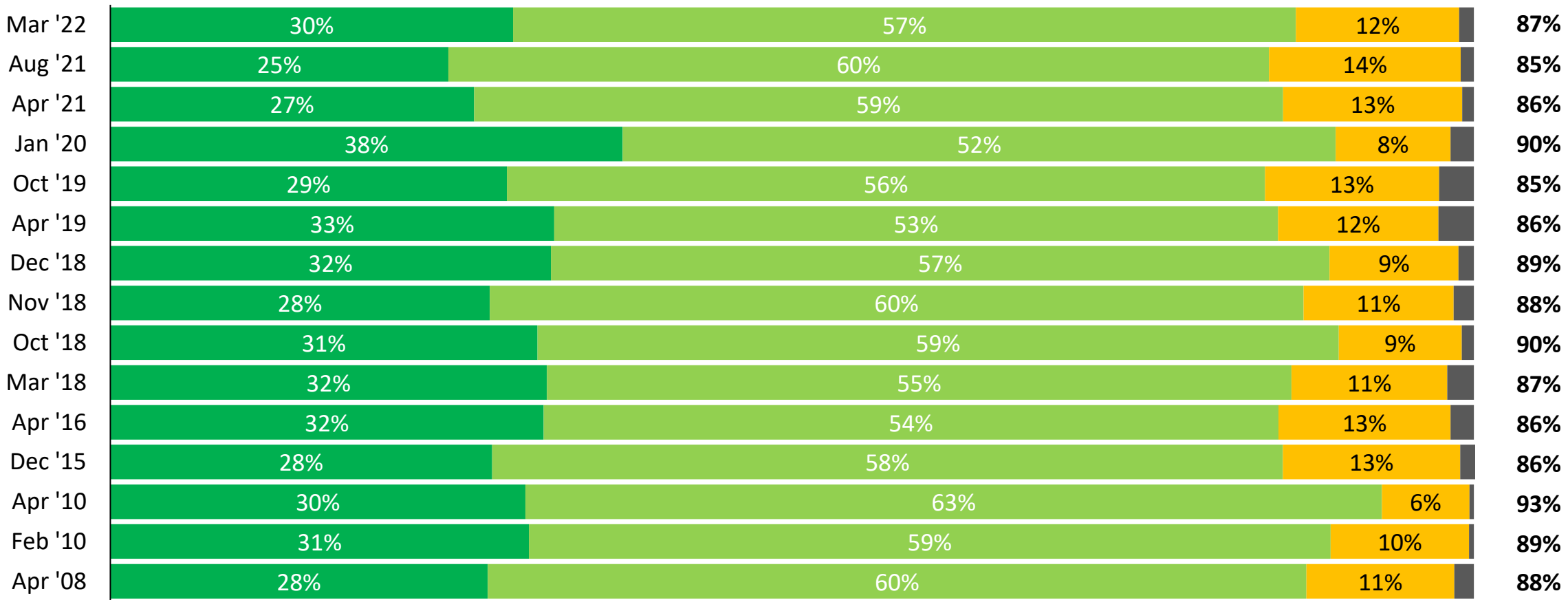


Familiarity with Climate Change: Familiarity with climate change is high, but less than 1-in-3 have a detailed understanding



How familiar are you with the concept of climate change?
[asked of all respondents; n=1,200]

Familiar
(Detailed + General Understanding)



■ You have a detailed understanding of climate change

■ You have a general understanding of climate change but don't know the details

■ You have heard of climate change but don't know much about it

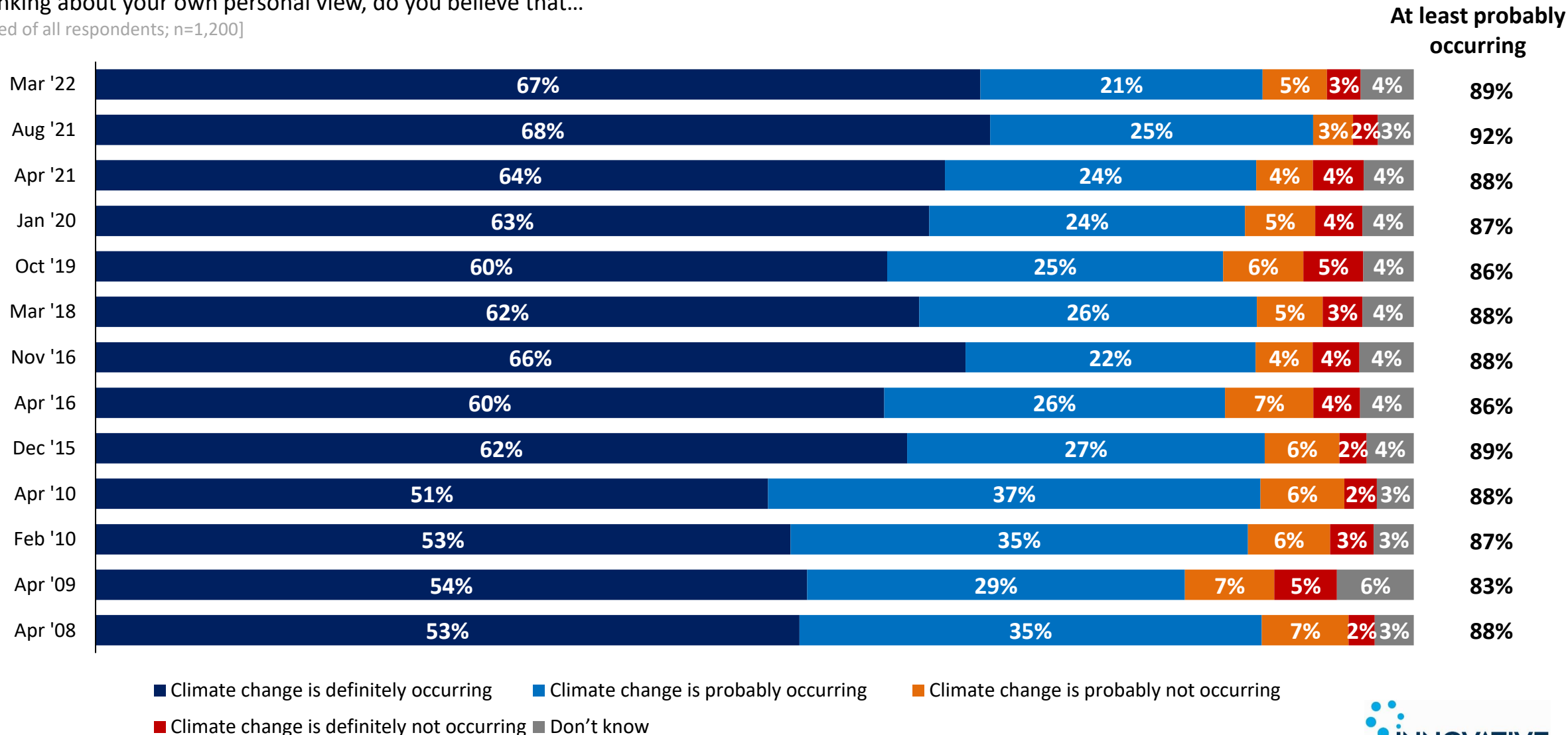
■ You haven't heard of climate change before this survey

NOTE: Prior to 2010, the term "global warming" was used in place of "climate change"



Belief in Climate Change: Belief in climate change is down directionally, but 9-in-10 still believe it is at least probably occurring

Thinking about your own personal view, do you believe that...
[asked of all respondents; n=1,200]



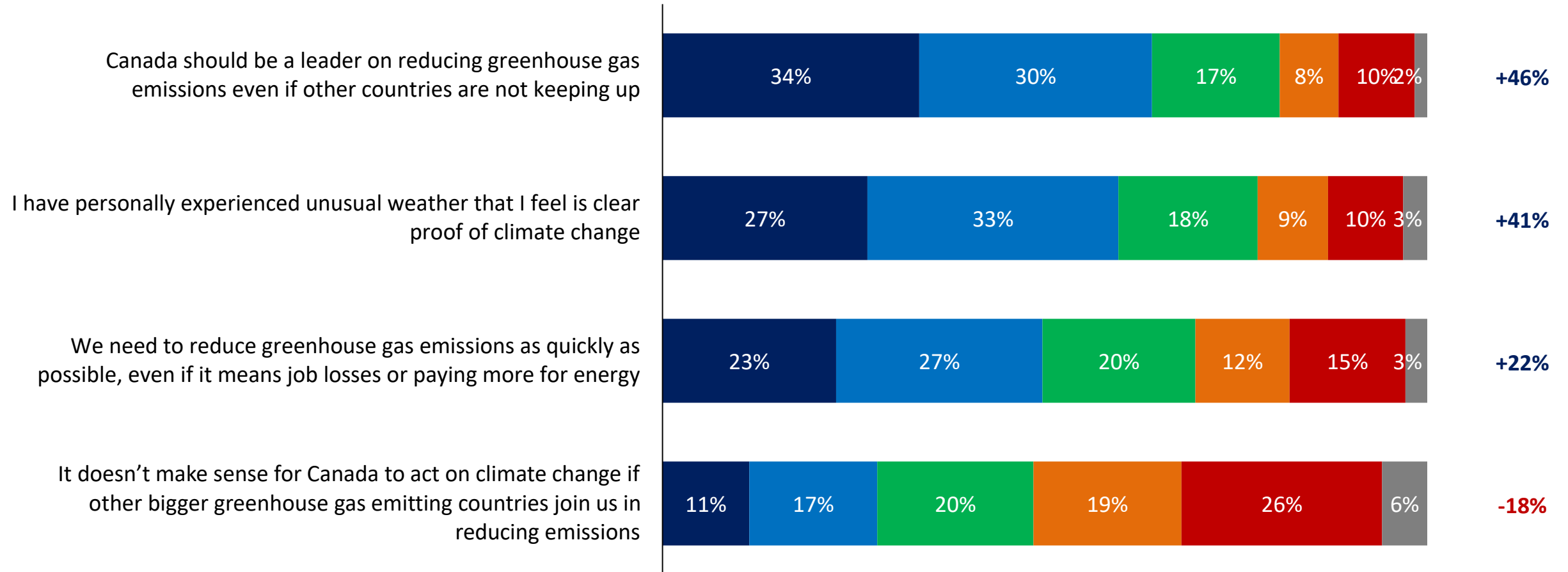
Attitudes: A majority of Canadians agree Canada should be a leader even if other countries are not keeping up



Do you agree or disagree with the following statements?

[asked of all respondents; n=1,200]

Net Agree



■ Strongly agree

■ Somewhat disagree

■ Somewhat agree

■ Strongly disagree

■ Neither agree nor disagree

■ Don't know

Energy Transition

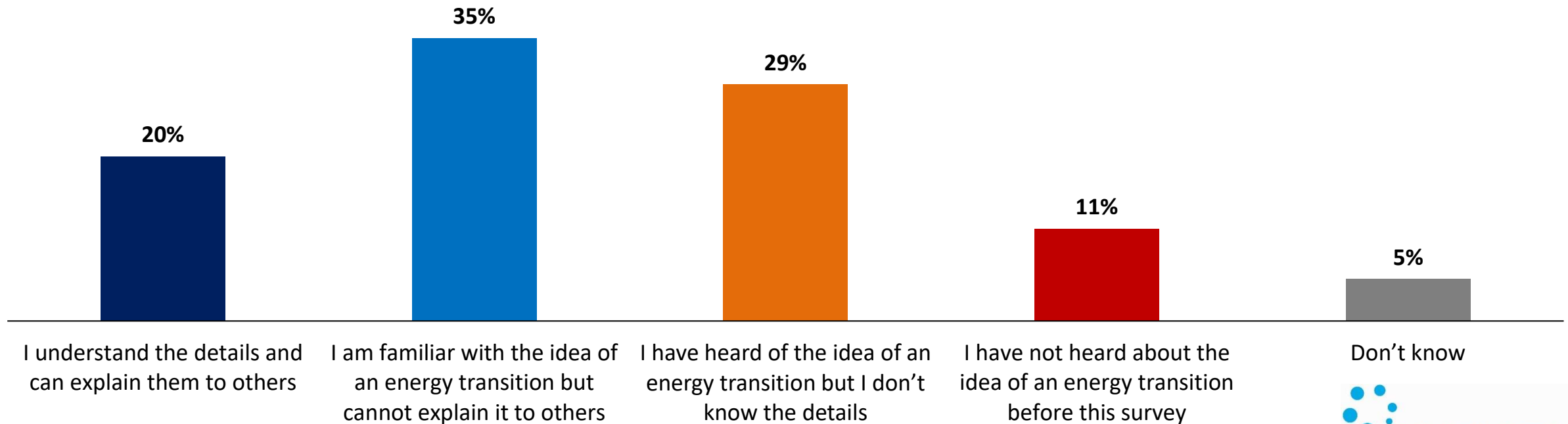
Energy Transition: Just over half (55%) say they are at least familiar with the idea of an energy transition



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; n=1,200]



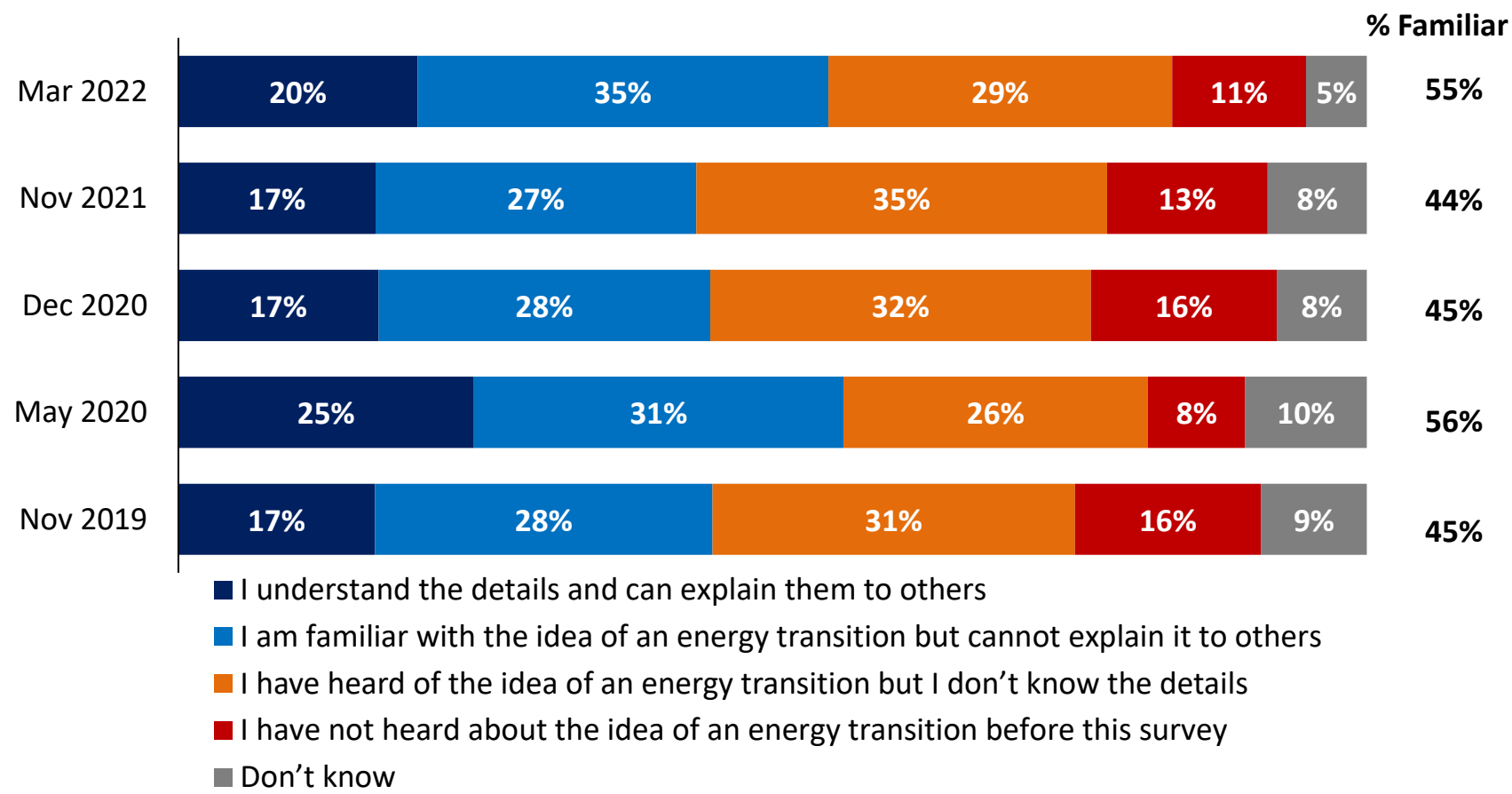
Energy Transition Familiarity: Familiarity has rebounded after dropping in late 2020



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?

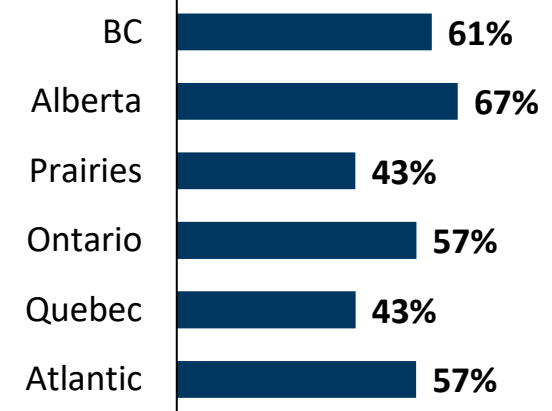
[asked of all respondents n=1,200]



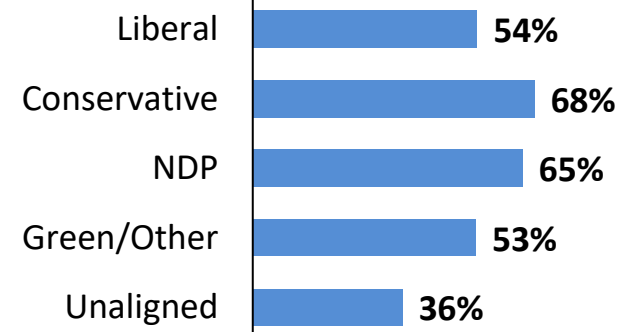
Sample Breakdown (current wave)

Those who say they "familiar"

Region



Party ID



Key Energy Transition Attitudes

Exploring Energy Transition Attitudes

However, for most people, the issue of an energy transition away from fossil fuels is 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: A majority agree that developing oil and gas is critical to Canada's ongoing prosperity

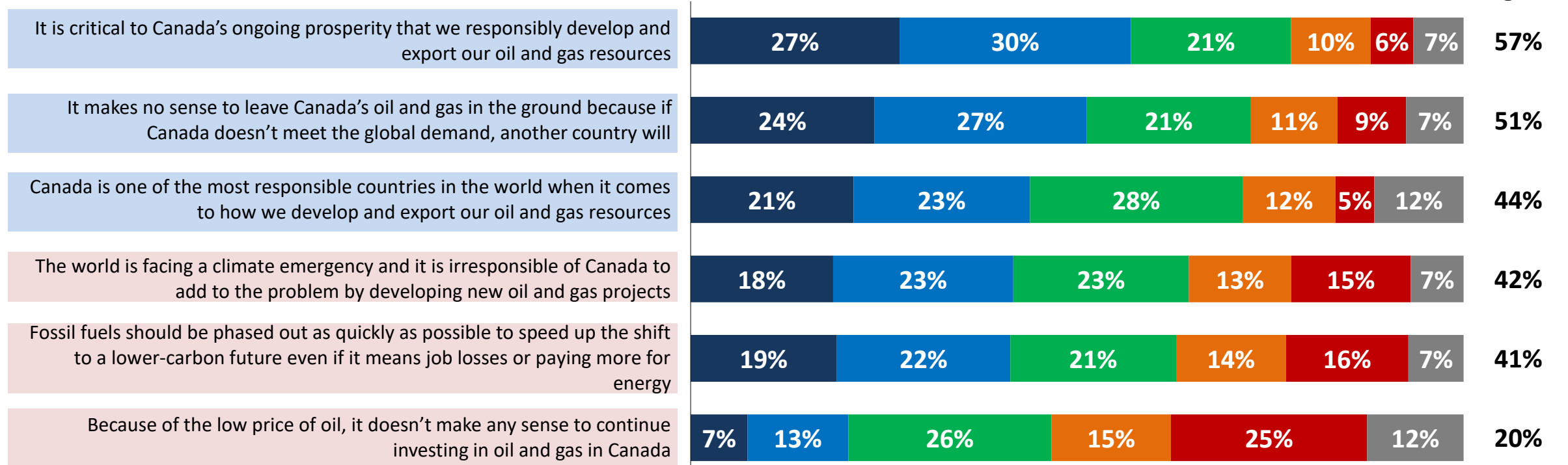
To fully understand Canadians' attitudes towards oil/gas developments, we ask respondents to react to a series of agree and disagree statements on energy transition from a wide range of perspectives.

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



Do you agree or disagree with the following statements?

[asked of all respondents n=1,200]



Pro-oil statements

Pro-transition statements

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

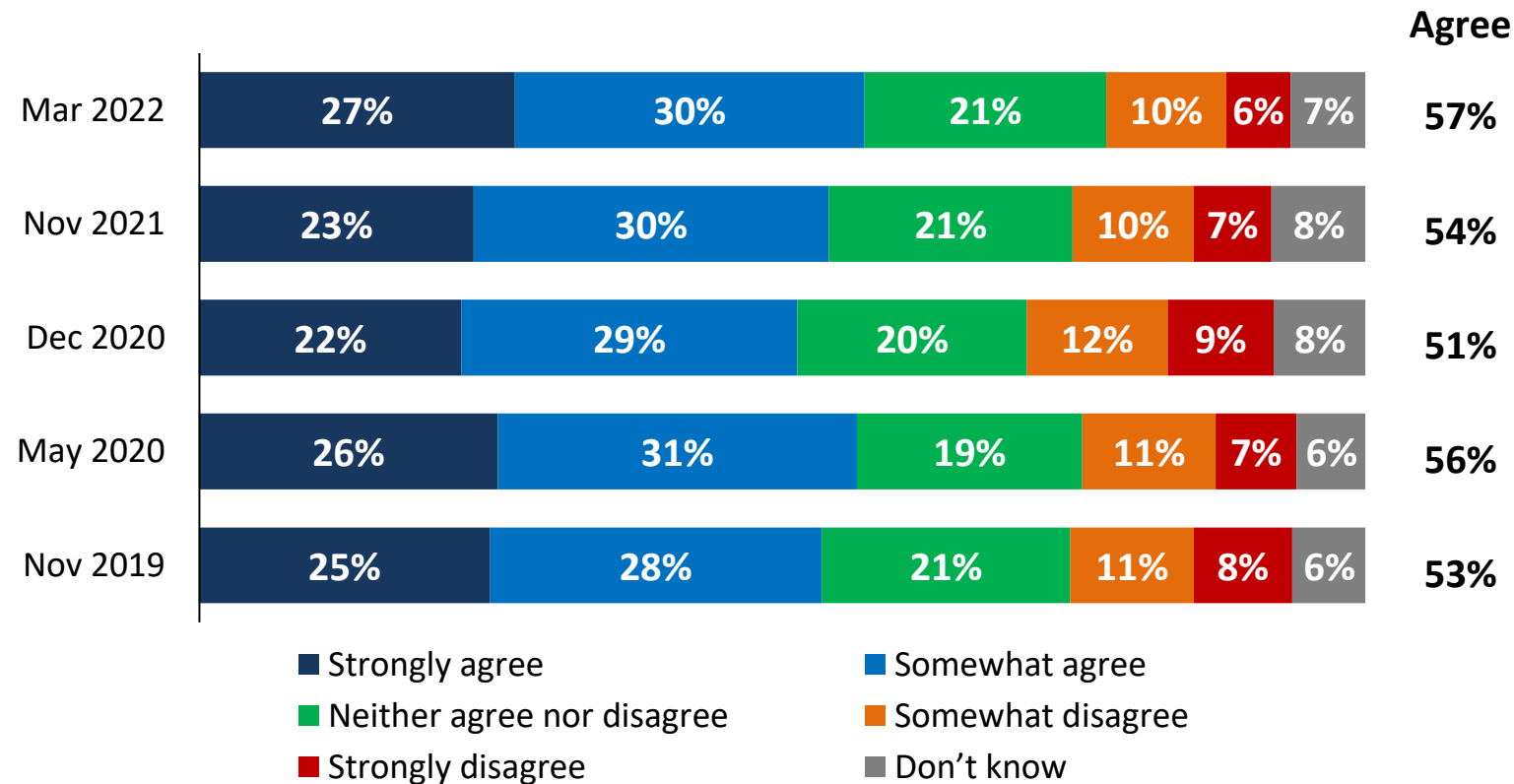


Ongoing Prosperity: Agreement is up since November to the highest point since tracking began in 2019



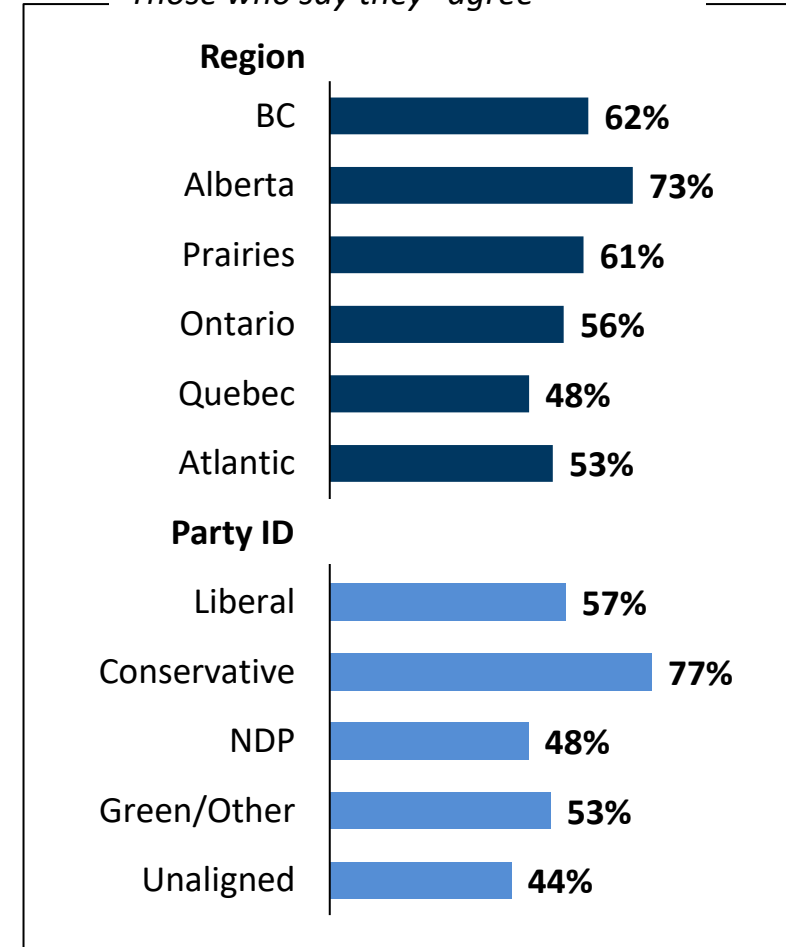
Do you agree or disagree with the following statements?
[asked of all respondents n=1,200]

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



Sample Breakdown (current wave)

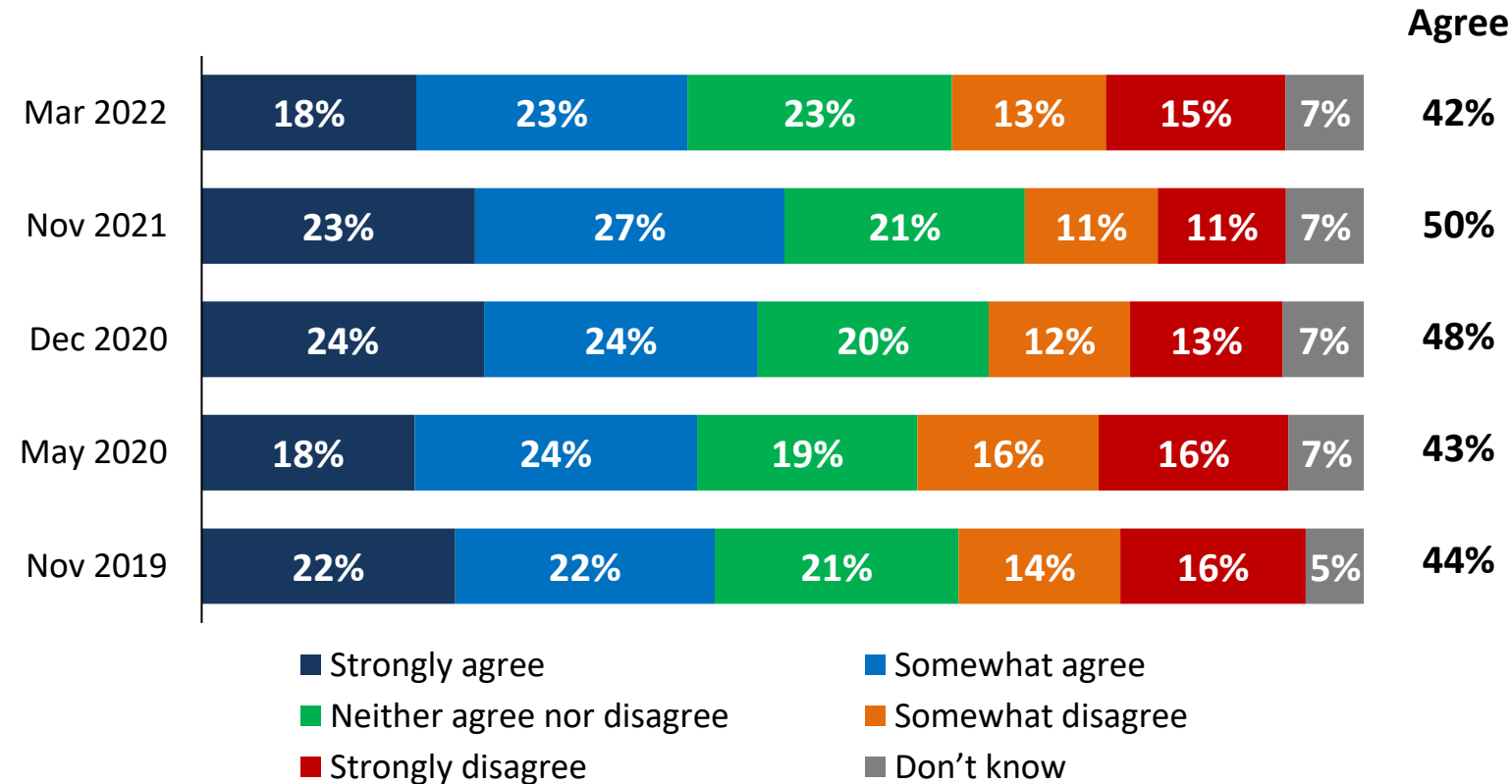
Those who say they "agree"



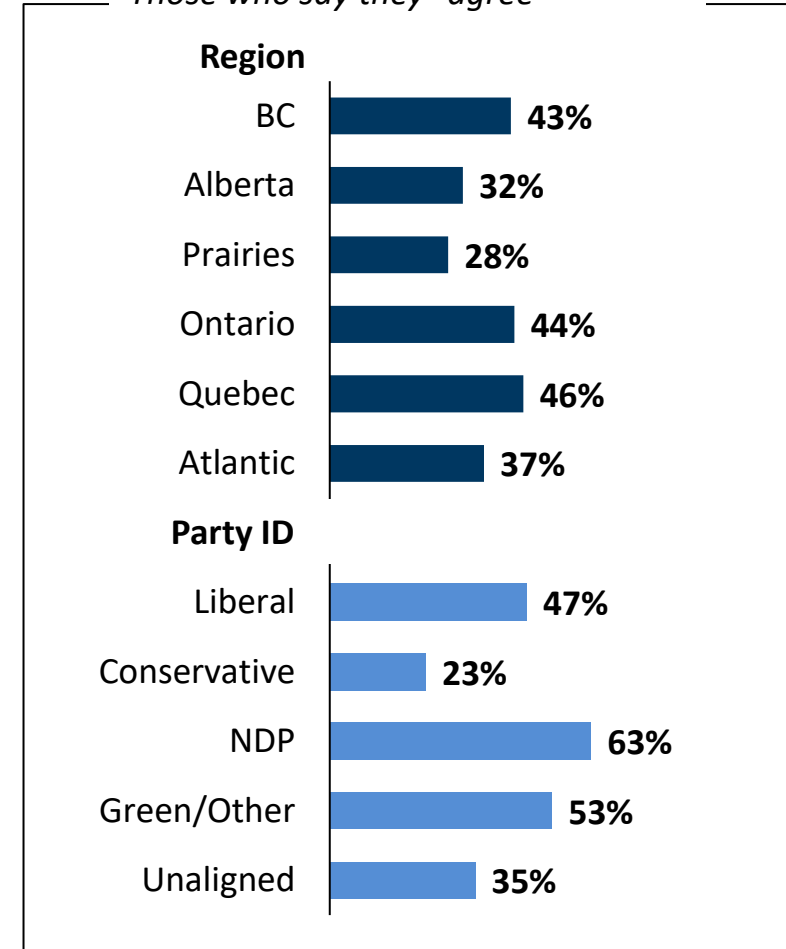
Irresponsible to Develops Oil/Gas: Agreement is down from 50% in November to 42% now; highest among NDP partisans

Q Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements.
 [asked of all respondents n=1,200]

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"



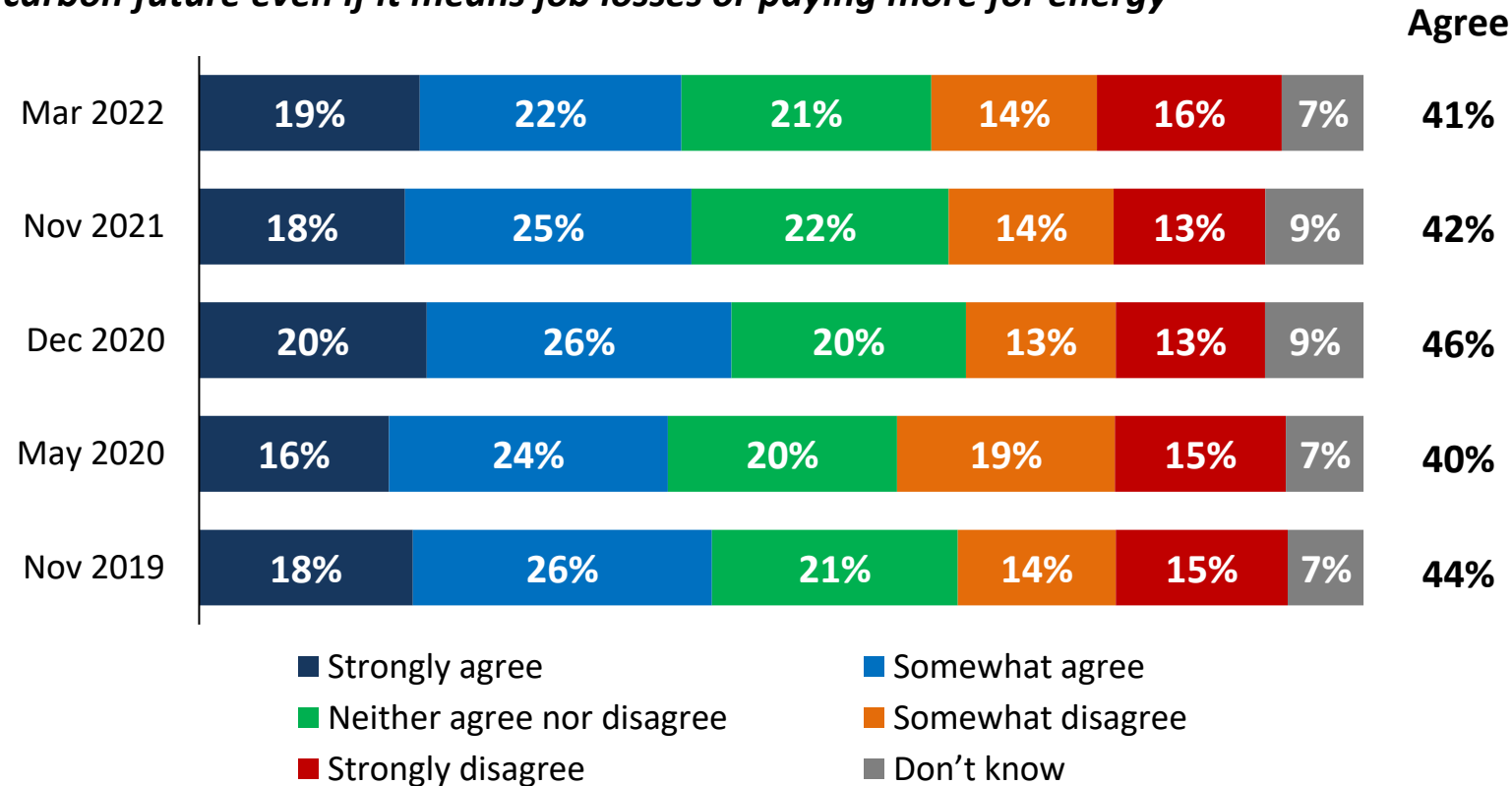
Quickly Phase out Fossil Fuels: Agreement that Canada should quickly switch to low-carbon energy sources is steady



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

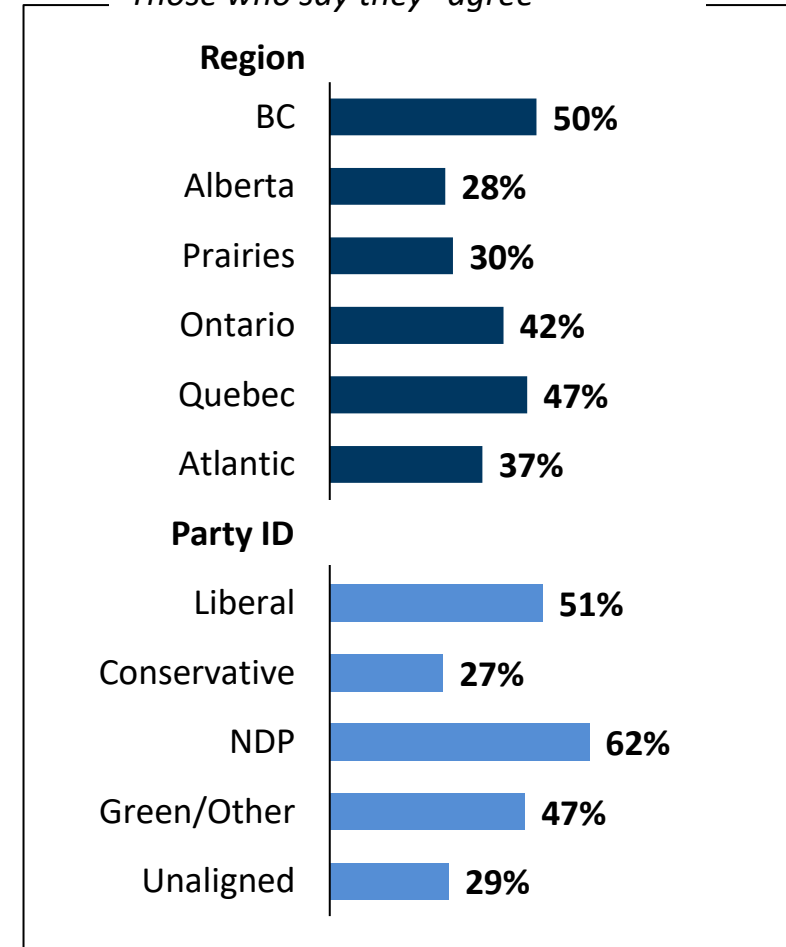
[asked of all respondents n=1,200]

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"



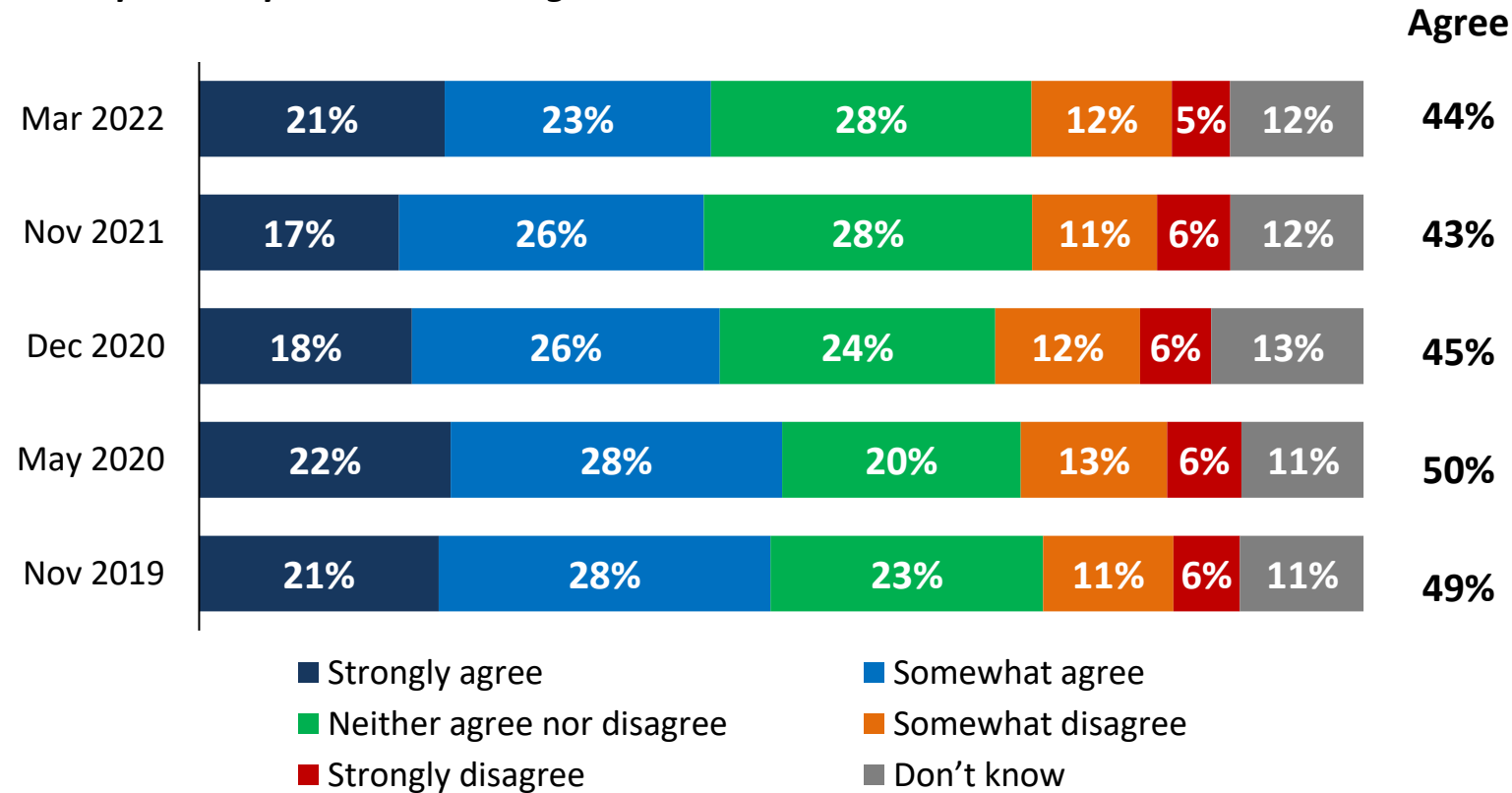
As a Responsible Country: Agreement that Canada is one of the most responsible producers is mostly steady but intensity is up



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

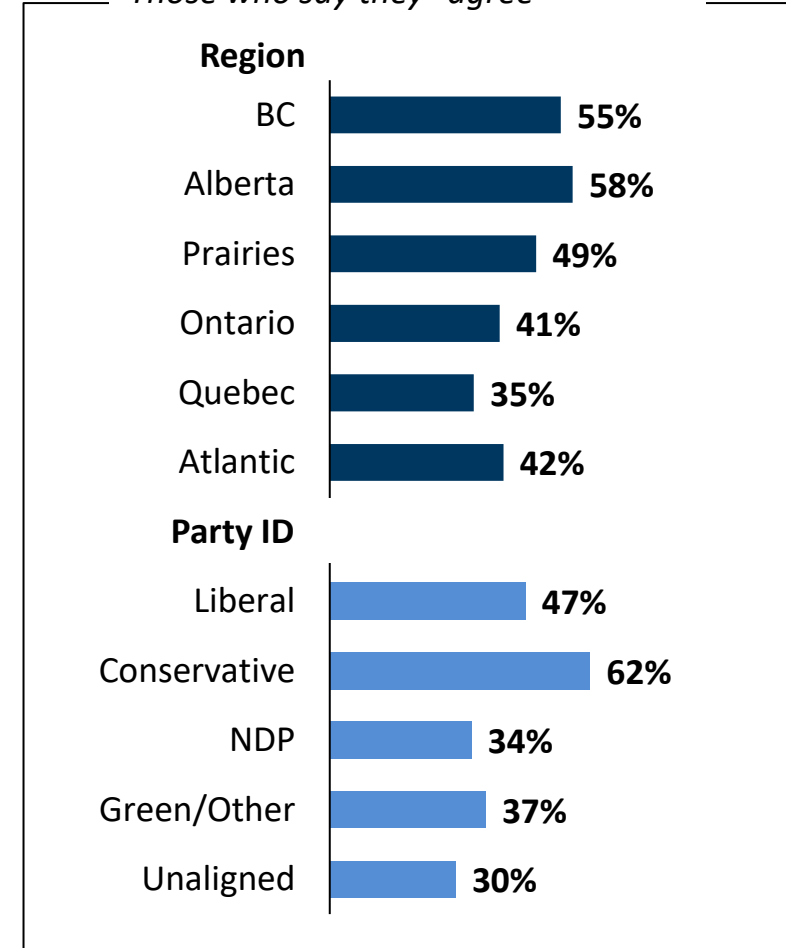
[asked of all respondents n=1,200]

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"



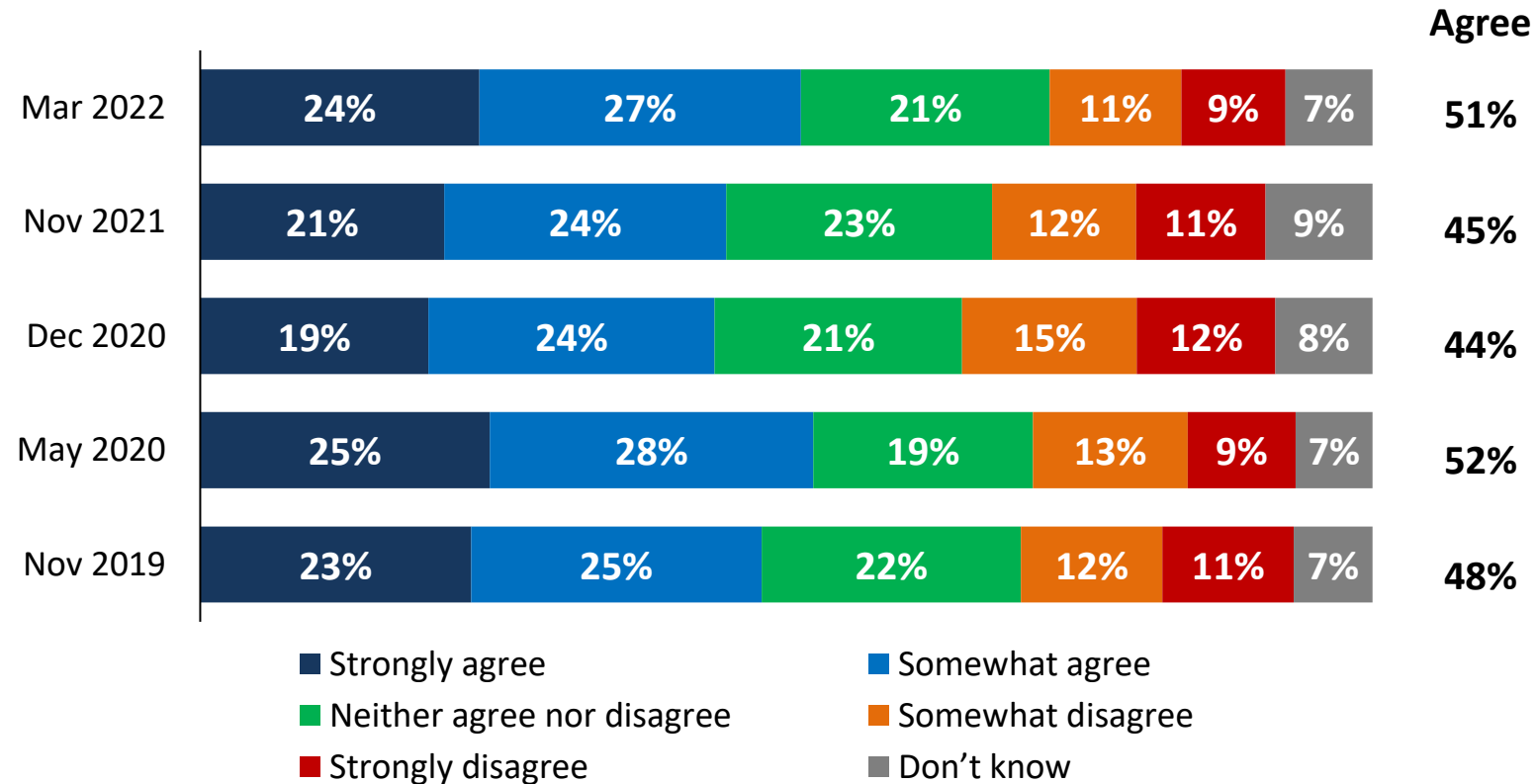
Shouldn't Leave Oil/Gas in the Ground: Agreement that it makes no sense to leave oil in the ground is up to 51%



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

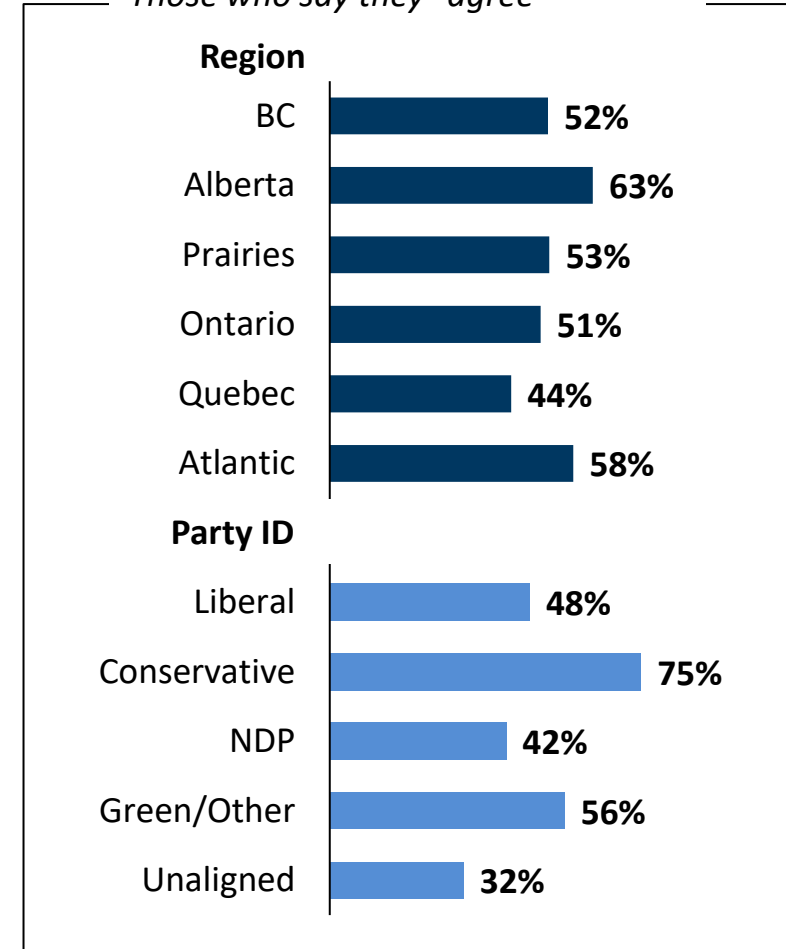
[asked of all respondents n=1,200]

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)

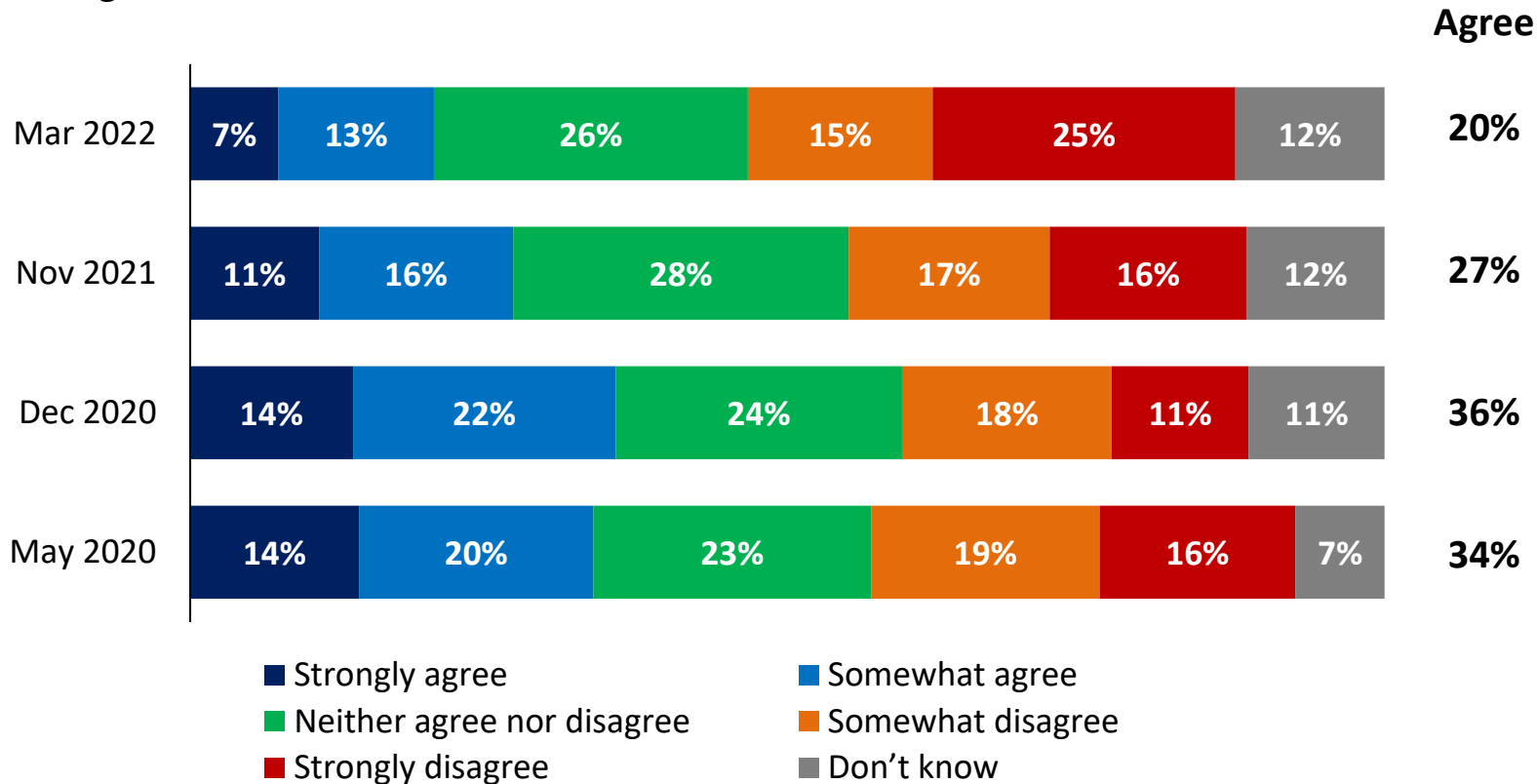
Those who say they "agree"



Make No Sense to Invest in Oil/Gas: Agreement that it is not worth investing in oil and gas is down as the price of gas has increased

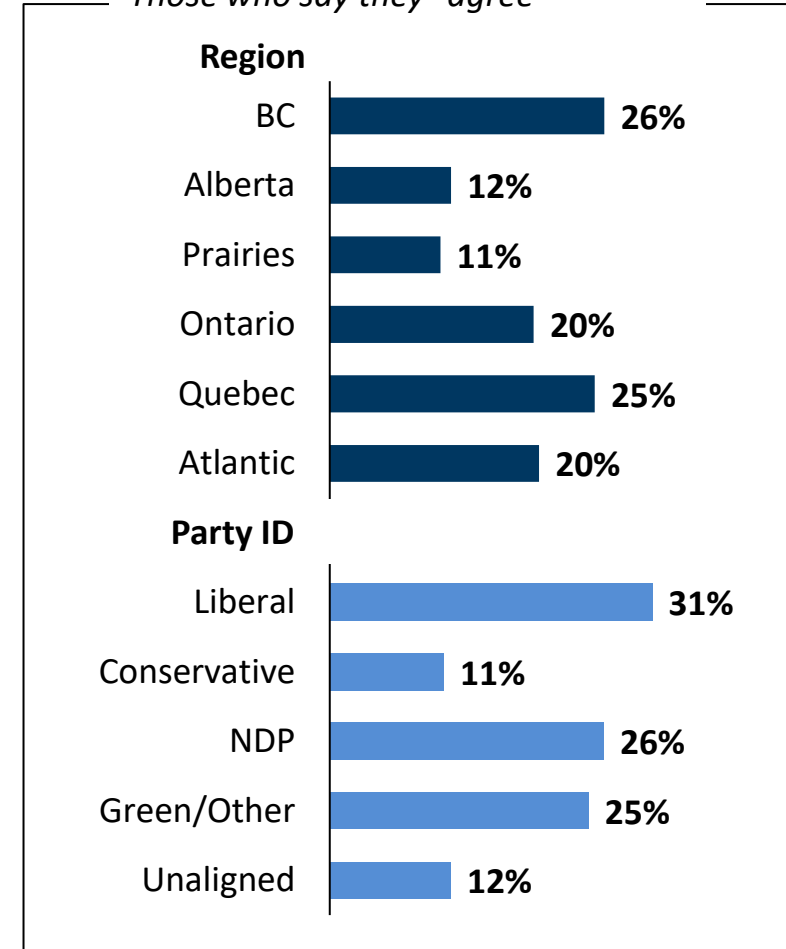
Q Please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements.
 [asked of all respondents n=1,200]

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



Sample Breakdown (current wave)

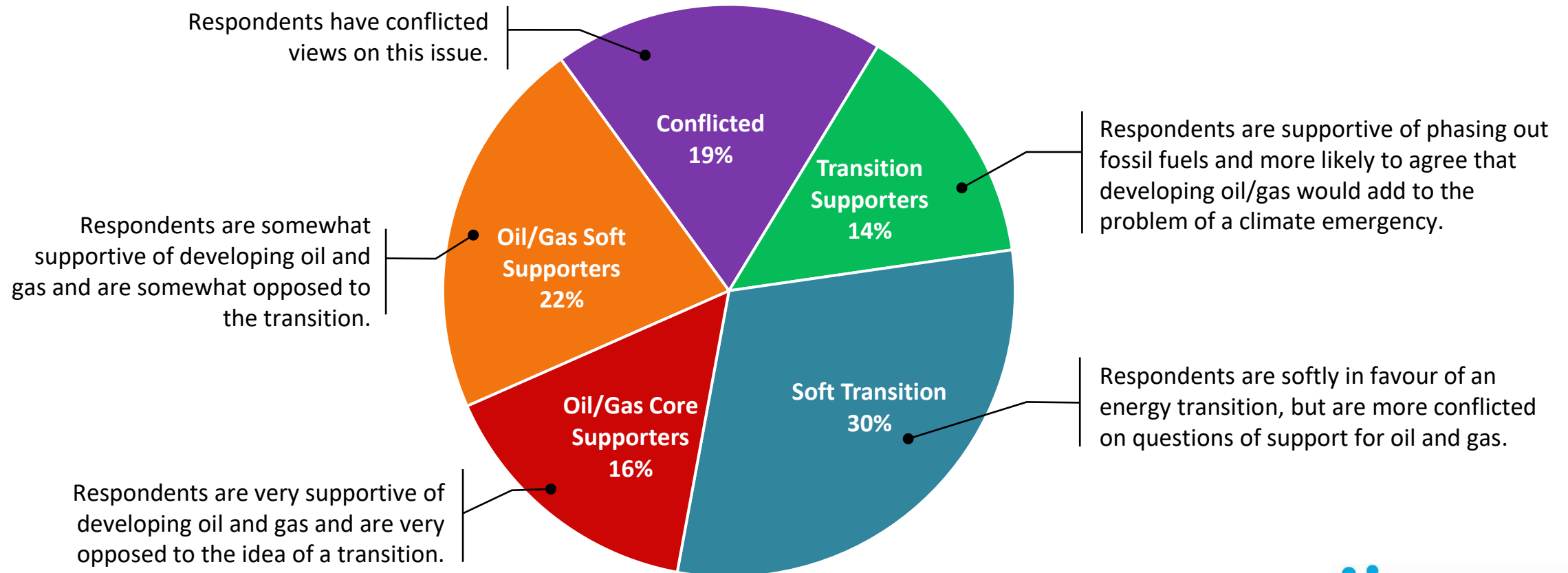
Those who say they "agree"



Note: Question not asked in November 2019.

Transition Cluster: Nearly a third are soft transition supporters while 19% are conflicted

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.



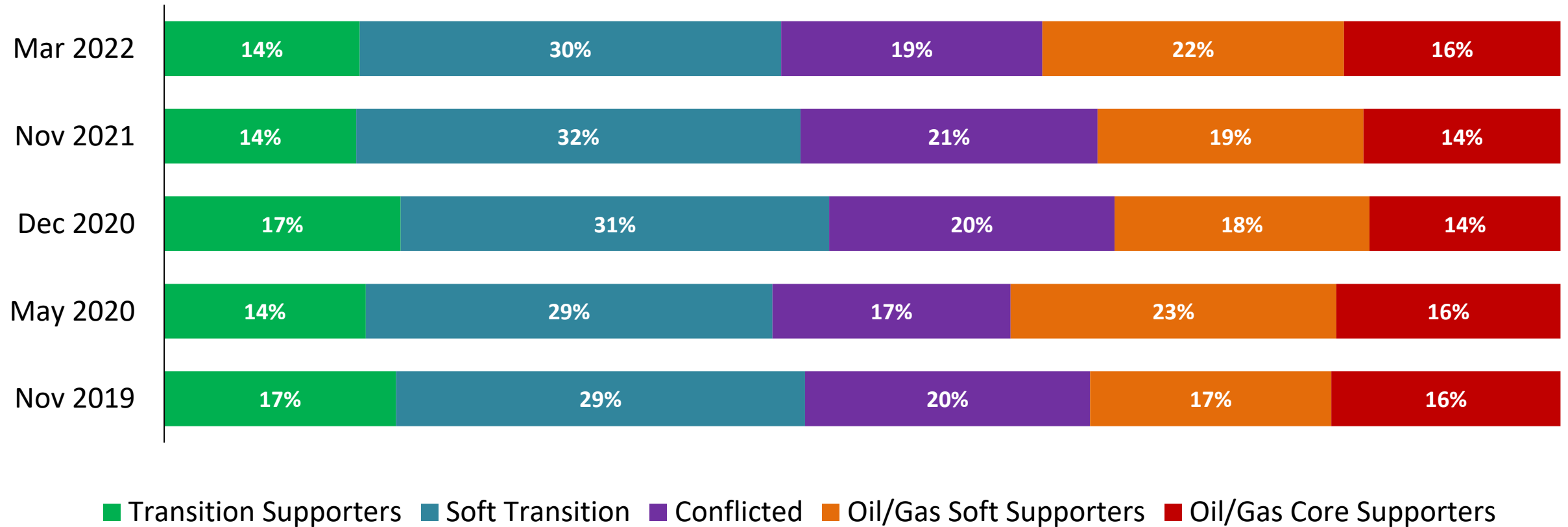
Defining the Transition Clusters

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 | Soft Transition | Conflicted | Oil/Gas Soft Supporters | Oil/Gas Core Supporters |
|-------------------------------------|--|-----------------------|-----------------|------------|-------------------------|-------------------------|
| Support Oil/Gas Developments | Develop oil/gas for ongoing prosperity | -62% | +4% | +86% | +79% | +99% |
| | Shouldn't leave oil/gas in the ground | -85% | -1% | +72% | +71% | +93% |
| | We develop oil/gas responsibly | -26% | 0% | +71% | +32% | +67% |
| Move Away from Oil/Gas Developments | Irresponsible to develop oil/gas | +98% | +25% | +86% | -44% | -95% |
| | Quickly phase out fossil fuels | +97% | +12% | +82% | -29% | -97% |
| | Make no sense to invest in oil/gas | +34% | -17% | +44% | -63% | -95% |

Transition Cluster Tracking: The share of Canadians who are oil & gas supporters is up from November 2021

Transition Cluster Tracking



Carbon Tax

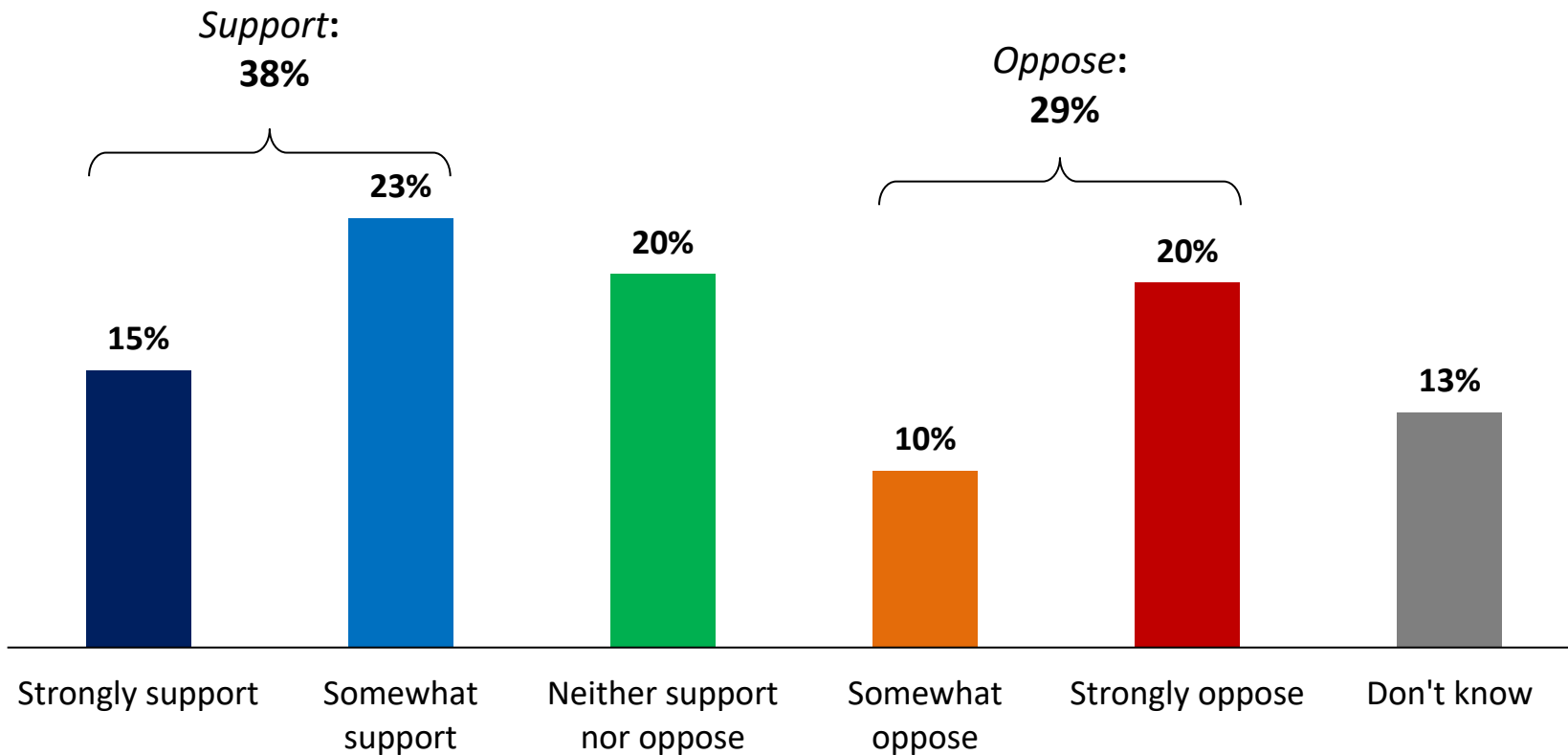
General Support for Carbon Tax: A plurality support a carbon tax, highest among NDP and Liberal partisans



Do you support or oppose the federal government implementing the following policy?

Establish a national minimum price for carbon and, in provinces that fail to meet that national minimum price, the federal government will introduce a carbon tax in that province where the money raised by that tax is returned to that provincial government.

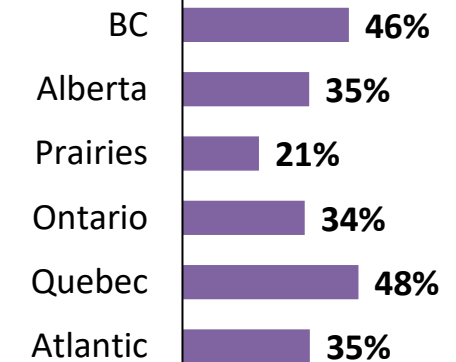
[asked of all respondents; n=1,200]



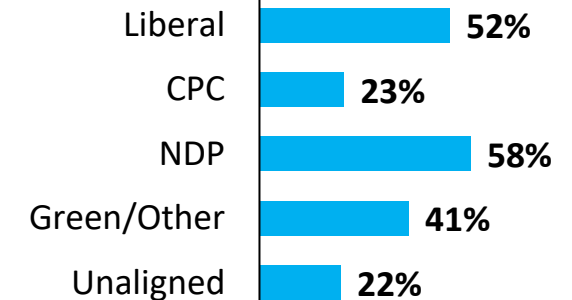
Segmentation

Respondents who say "support"

Region



Party ID



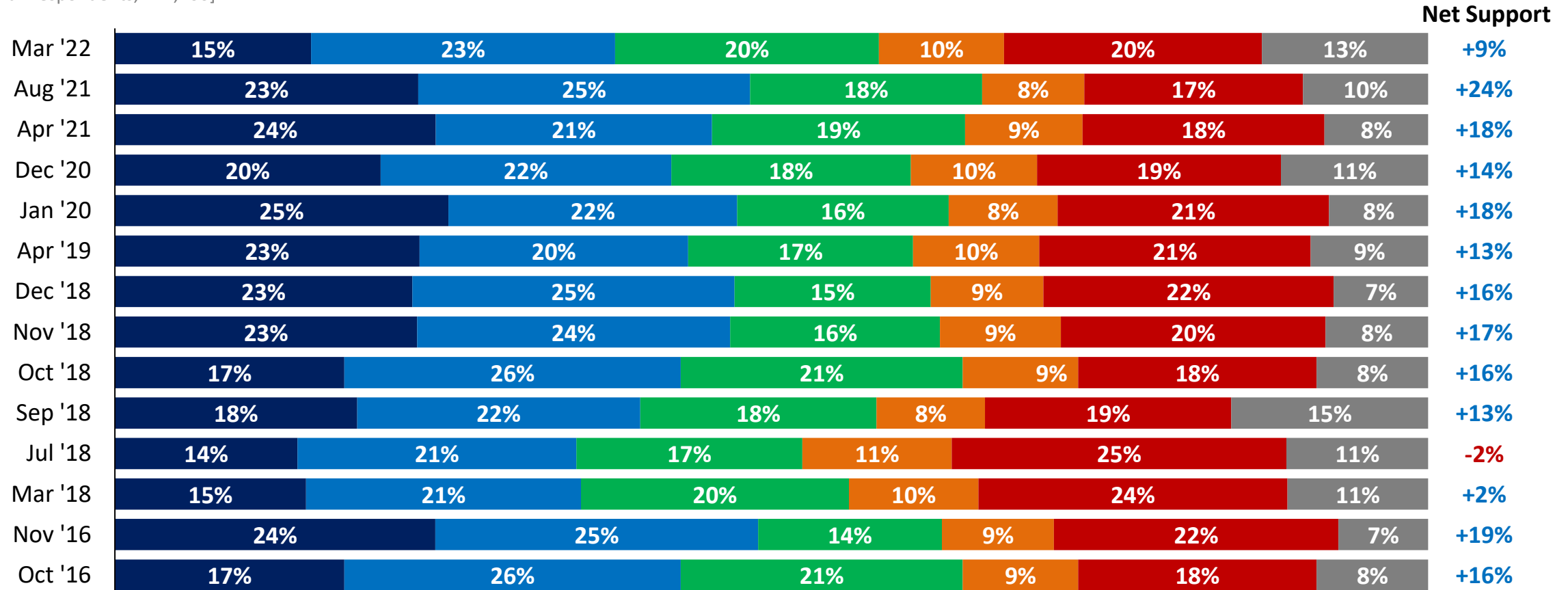
Tracking General Support for Carbon Tax: Support for a carbon tax is down from a high in August 2021 to only 38%



Do you support or oppose the federal government implementing the following policy?

Establish a national minimum price for carbon and, in provinces that fail to meet that national minimum price, the federal government will introduce a carbon tax in that province where the money raised by that tax is returned to that provincial government.

[asked of all respondents; n=1,200]



Strongly support

Somewhat support

Neither support nor oppose

Somewhat oppose

Strongly oppose

Don't know

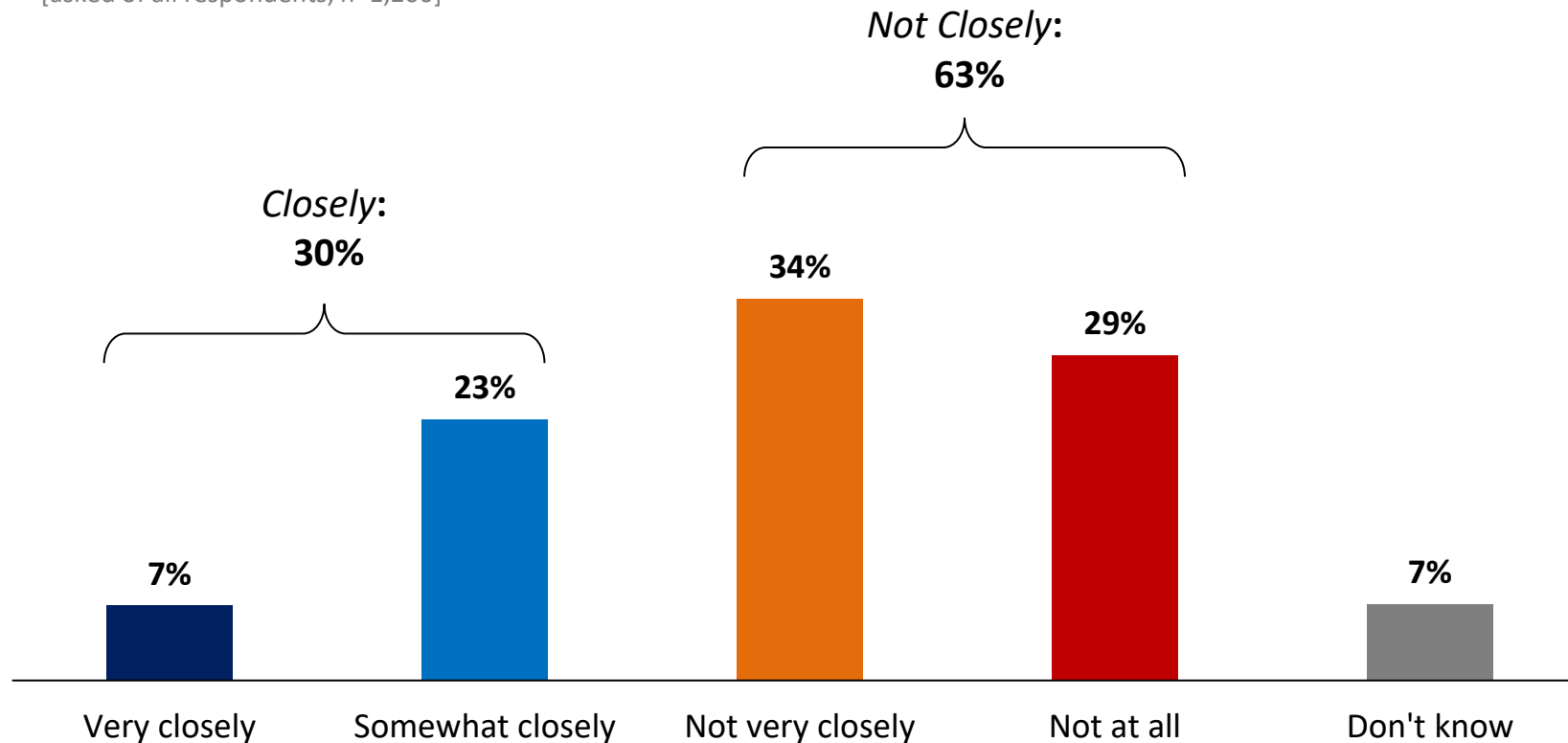
Following Carbon Tax Announcements: Most Canadians are not following news about the carbon tax closely



In December 2020, the federal government announced a new plan to address climate change entitled “A Healthy Environment and a Healthy Economy”. A key part of that will be to raise the carbon tax from \$30 a tonne to \$170 a tonne by 2030. The federal government will use 90 percent of those revenues to provide a rebate to consumers in those provinces. The remaining 10% will be used to provide support for schools, hospitals, small and medium-sized businesses, colleges and universities, municipalities, not-for-profit organizations and Indigenous communities.

How closely have you been following the news about this announcement?

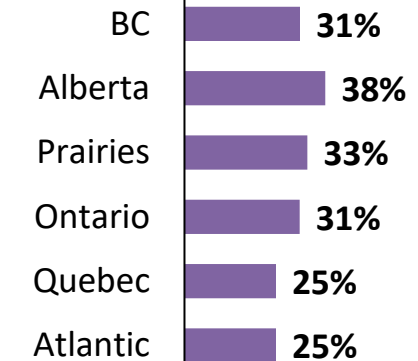
[asked of all respondents; n=1,200]



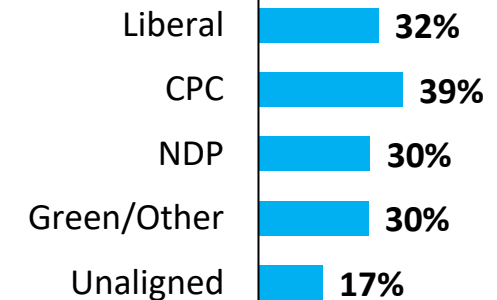
Segmentation

Respondents who say “closely”

Region

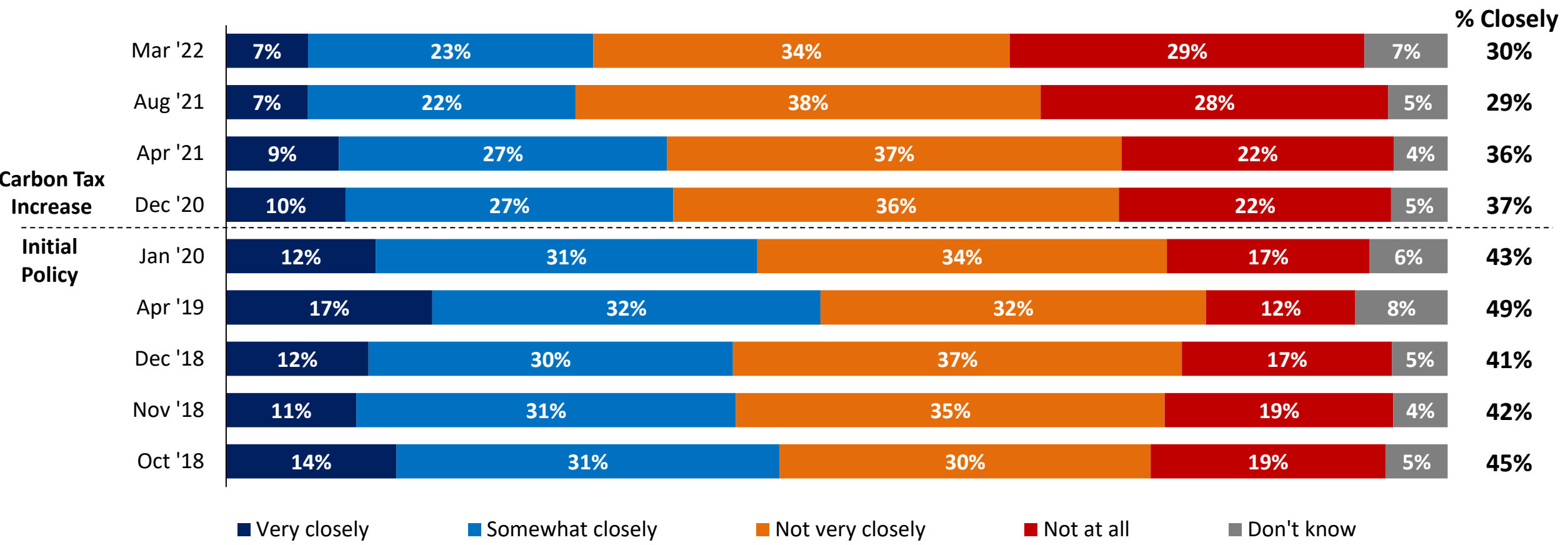


Party ID



Following Carbon Tax Announcements: Attention remains down after a low in August

Q How closely have you been following the news about this announcement?
 [asked of all respondents; n=1,200]



Note: Details of the policy were updated in December 2020 as the government announced an update.

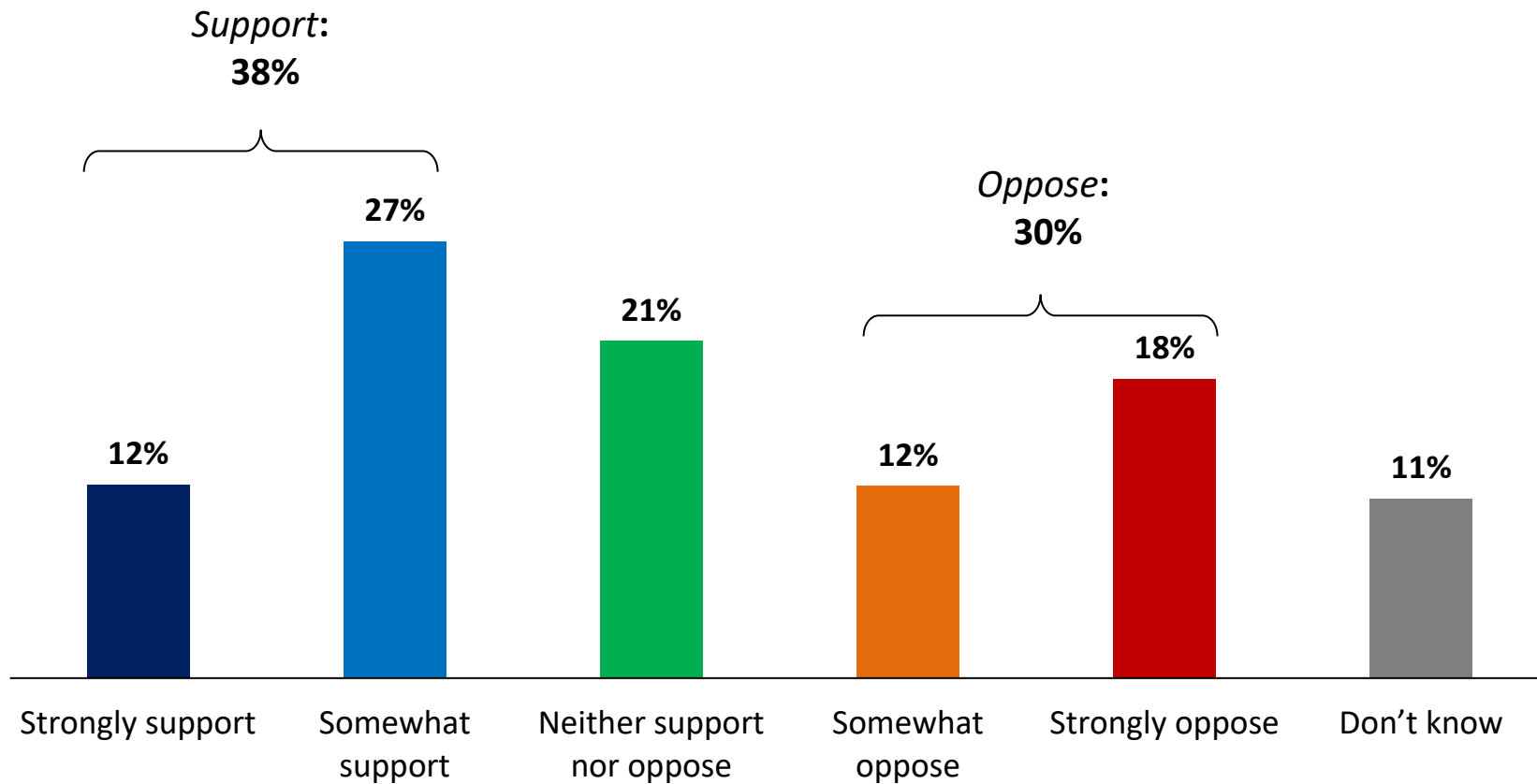


Policy Support: A plurality (38%) support the current carbon tax with support highest in BC and Quebec



Now that you know the details of the federal government’s carbon price policy, do you support or oppose that policy?

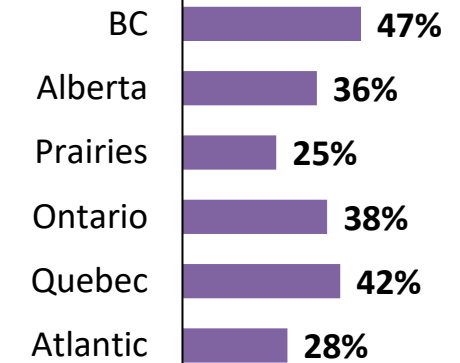
[asked of all respondents; n=1,200]



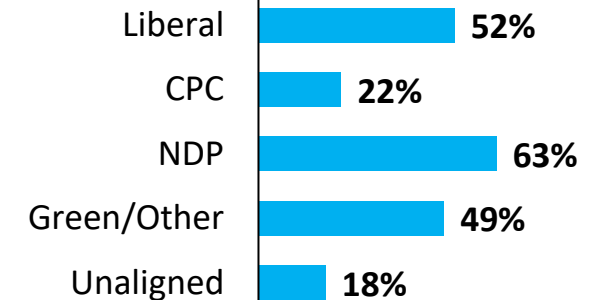
Segmentation

Respondents who say “support”

Region



Party ID

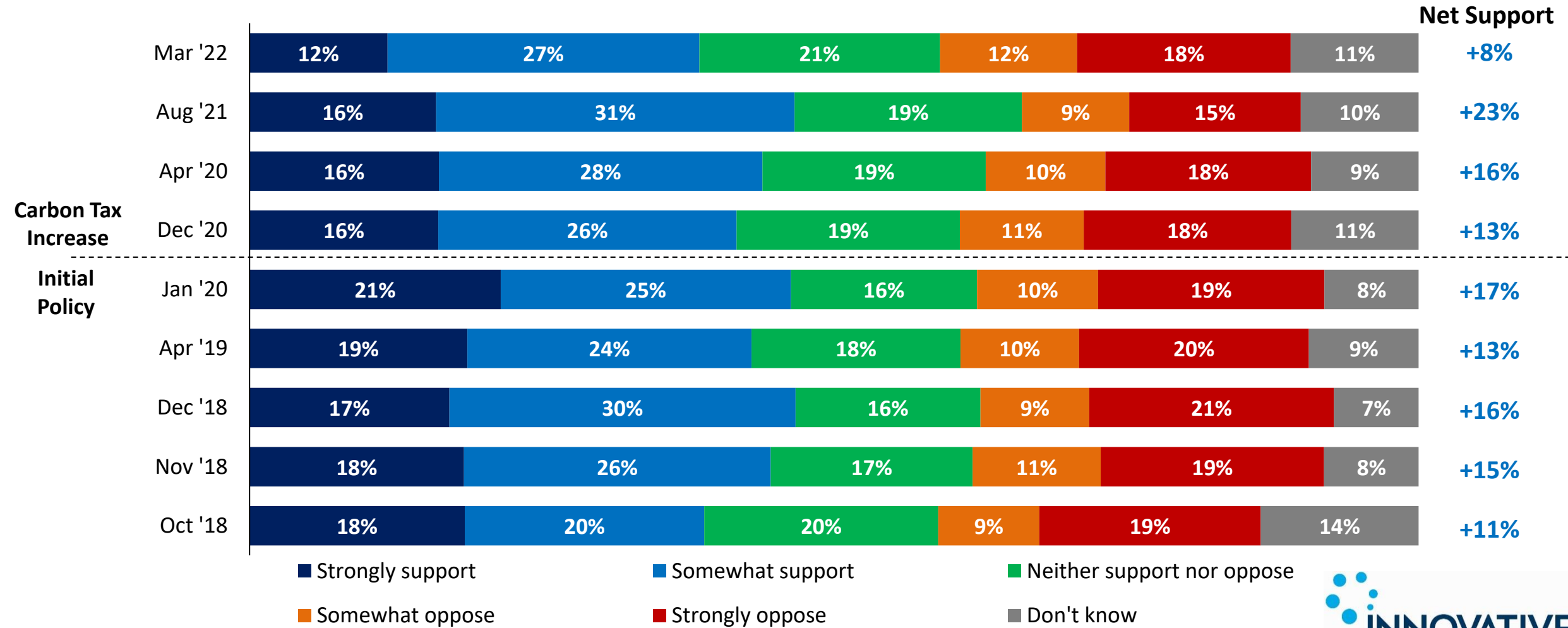


Tracking Policy Support: Support for the existing carbon tax is down from a high in August to 38% with 30% opposed



Now that you know the details of the federal government's carbon price policy, do you support or oppose that policy?

[asked of all respondents; n=1,200]

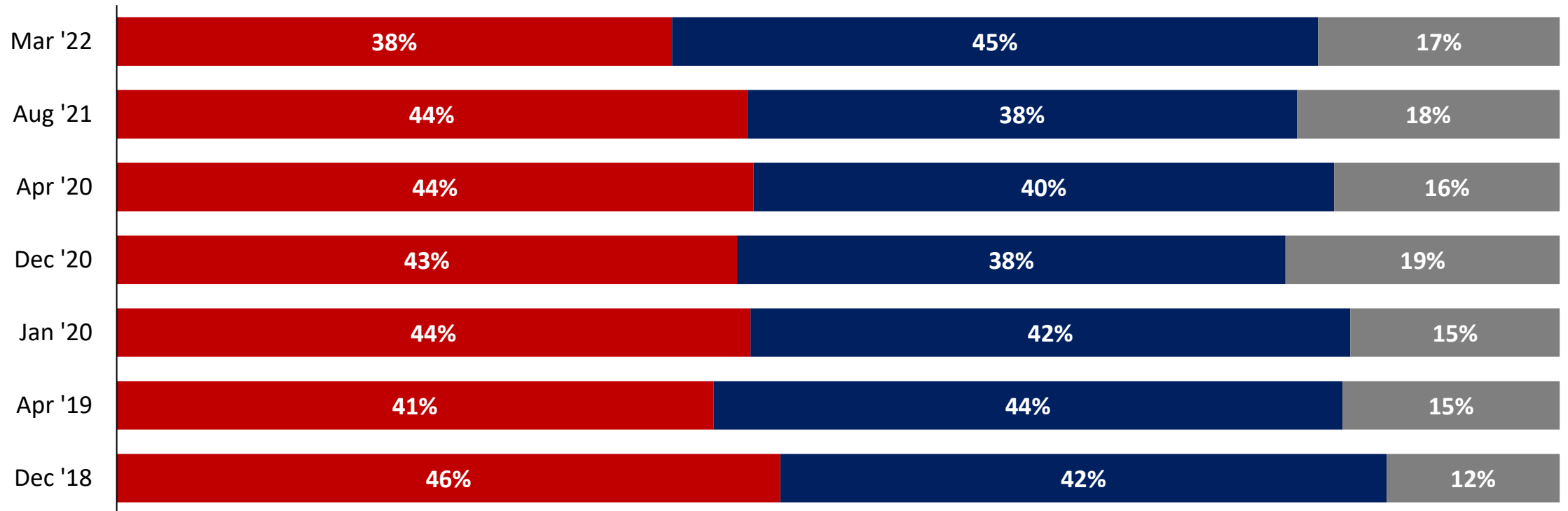


Note: Details of the policy were updated in December 2020 as the government announced an update.

Perception of Carbon Pricing Policy: A plurality now say carbon pricing is a cash grab, for the first time since April 2019



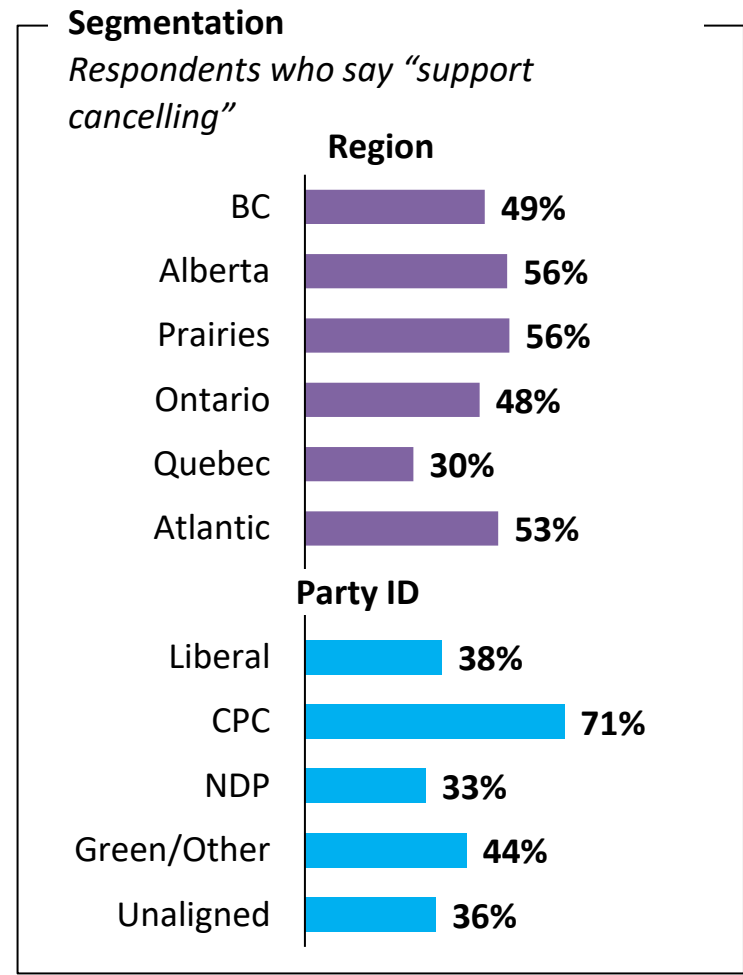
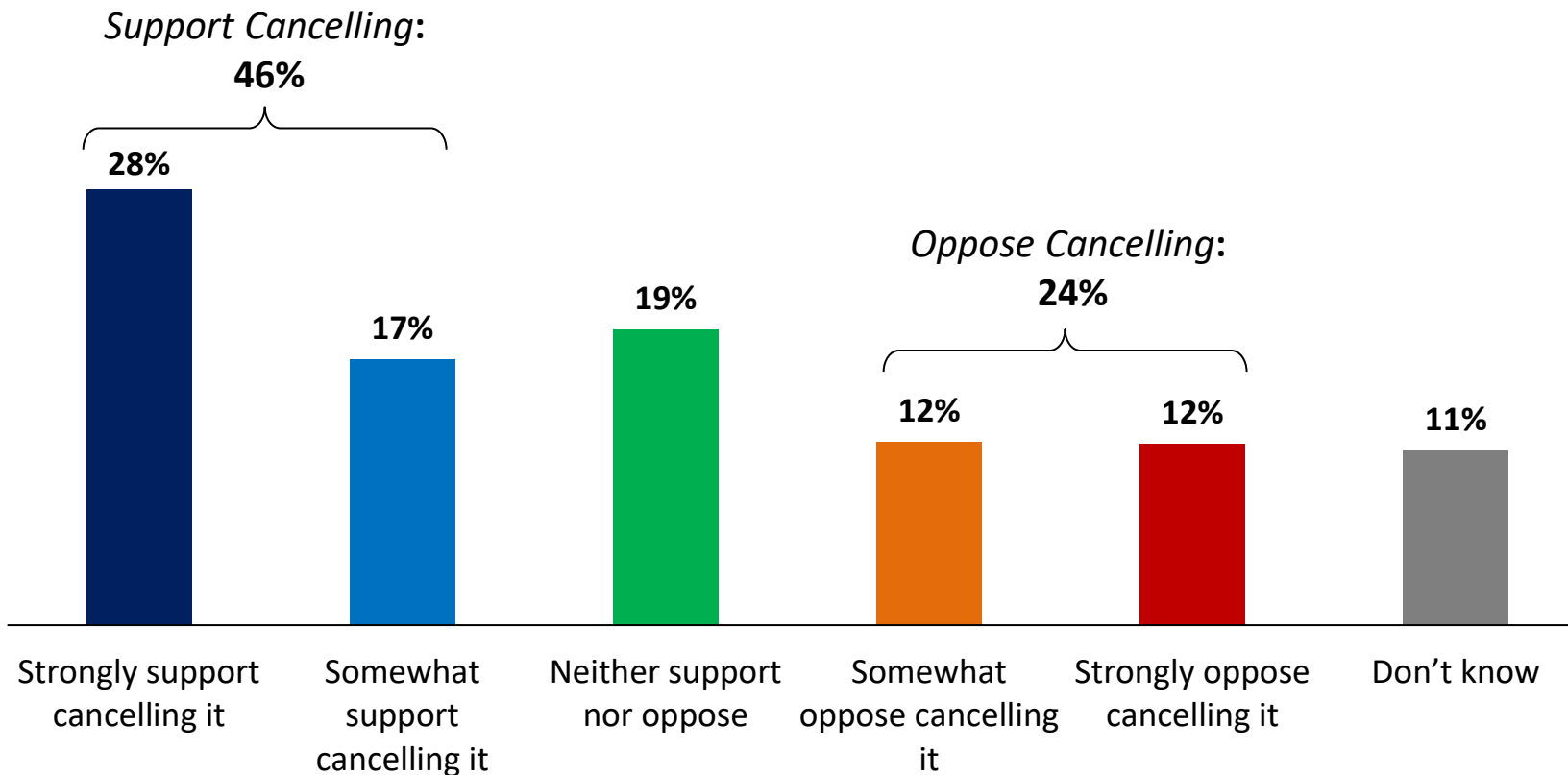
Based on what you know about the federal government's carbon pricing policy, which of the following statements is closest to your point of view?
[asked of all respondents; n=1,200]



- Putting a price on pollution is one of the best ways to lower carbon consumption and to fight climate change in this country
- The carbon pricing policy is just another tax grab that hinders the economic development of the country and does nothing for the environment
- Don't know

Policy Support: Just under half (46%) of Canadians support cancelling the carbon tax increase on April 1st

Q Recently some prominent Conservative MPs and possible leadership contenders have been calling the government to cancel an increasing the carbon tax, which is set to rise 25% from \$40 a tonne to \$50 a tonne on April 1st, because of the current levels of inflation. Do you support or oppose cancelling the proposed increase on April 1st?
 [asked of all respondents; n=1,200]

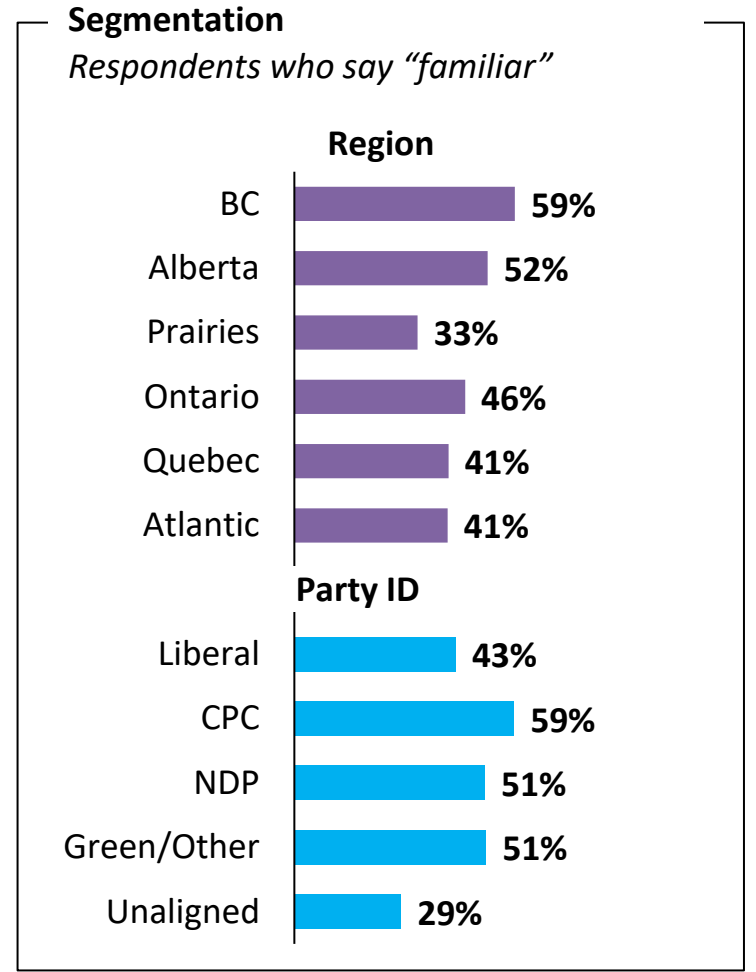
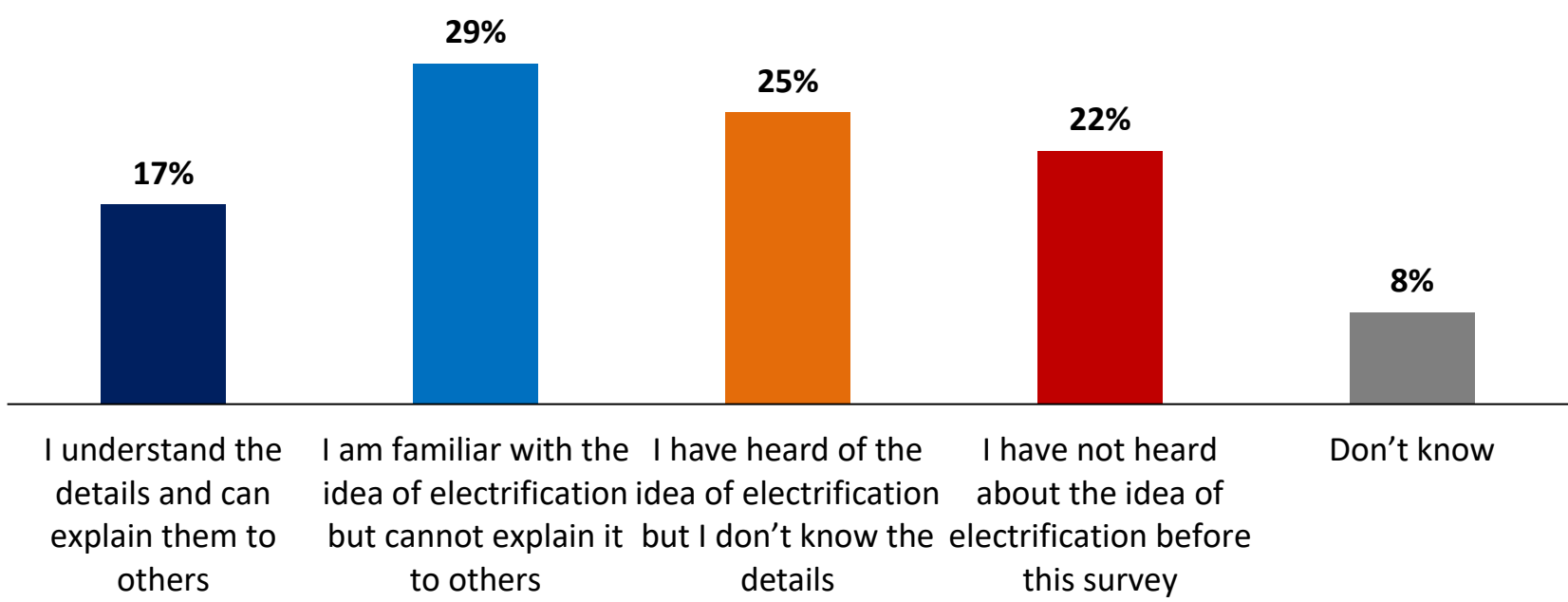


Electrification



Familiarity: Familiarity with electrification is highest in BC and Alberta, as well as with Conservative partisans

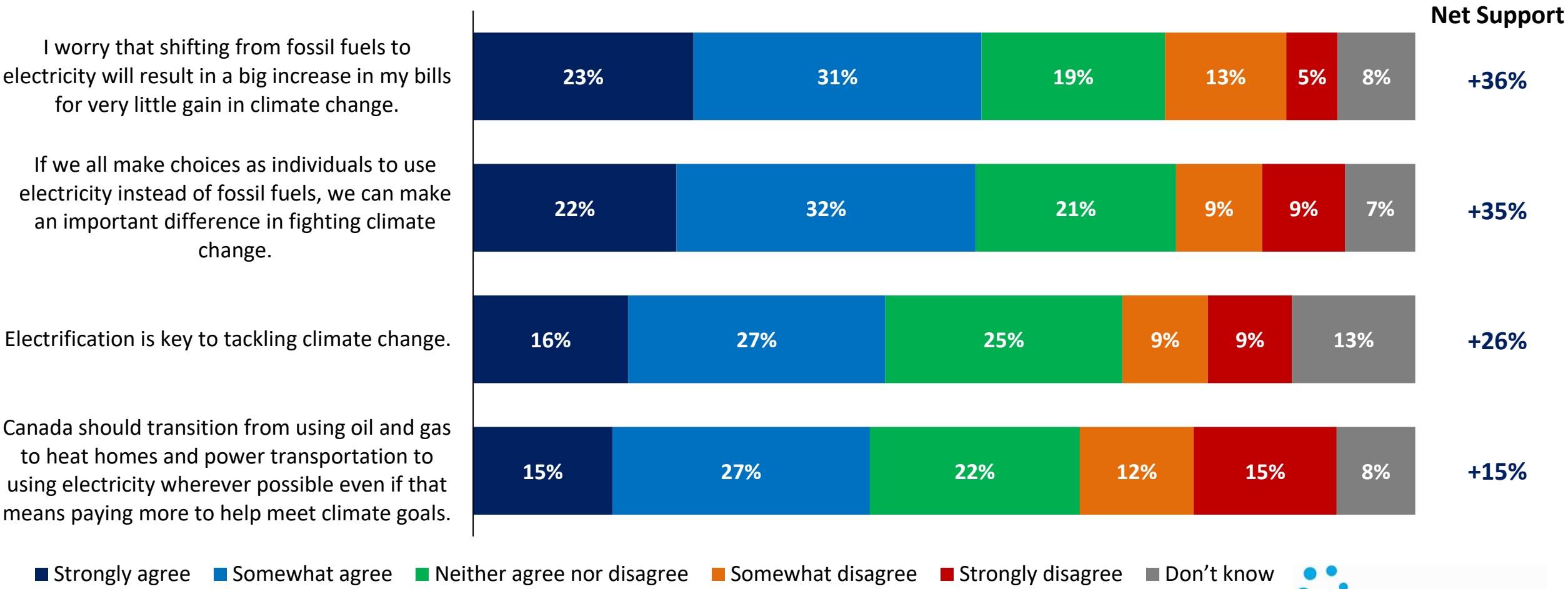
Q Another issue people have been talking about lately is the idea that Canada and the world may be shifting to electricity from other forms of power in a process known as electrification. This includes changing the power source for a variety of uses including cars, home heating, and other areas where fossil fuels have played a large role. How familiar are you with the idea of electrification?
 [asked of all respondents; n=1,200]



Attitudes: Just over half of Canadians are concerned that shifting to electricity will result in cost increases with little impact on the climate



Now that you know the details of the federal government’s carbon price policy, do you support or oppose that policy?
[asked of all respondents; n=1,200]



Note: Details of the policy were updated in December 2020 as the government announced an update.



Politics

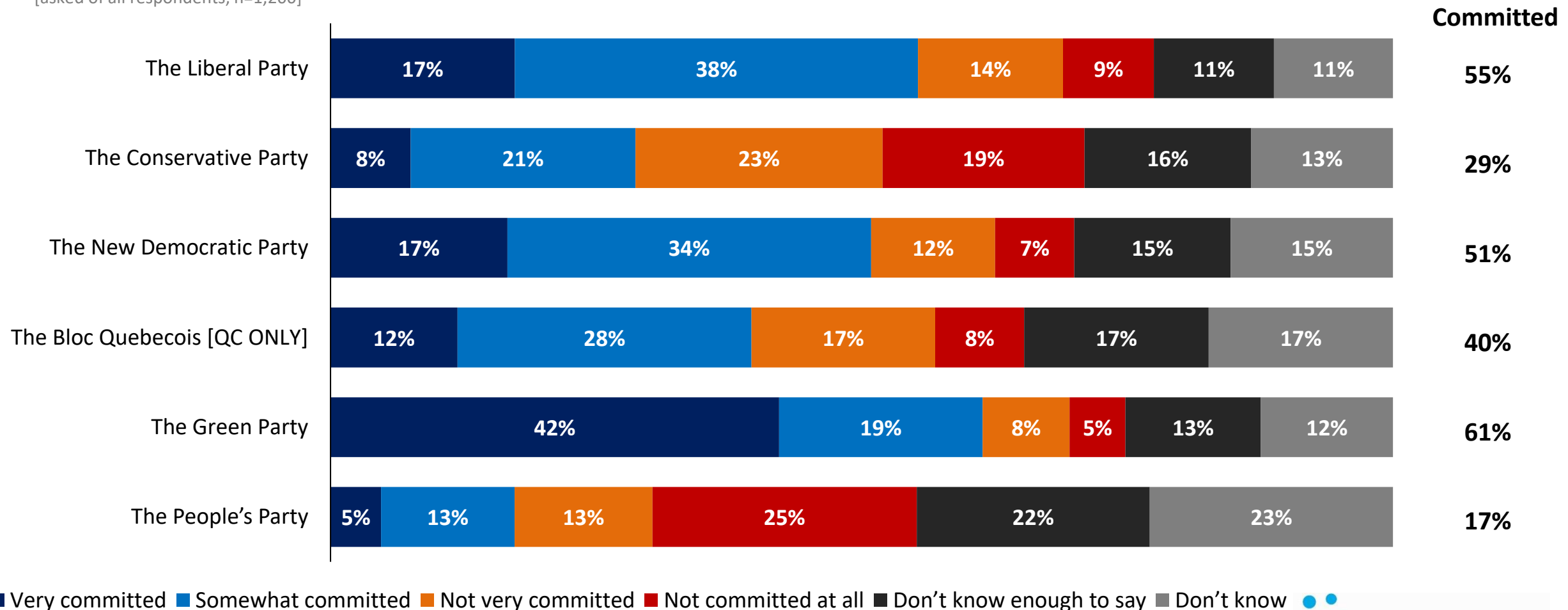
The background of the slide is a solid dark blue color. It features several light blue circles of varying sizes scattered across the surface. The circles are semi-transparent and do not overlap each other.

Commitment: The Liberals, NDP, and Green Party are seen as most committed to addressing climate change



Turning now to federal politics, for each federal party in Canada, please indicate in your view how committed that party is to address the issue of climate change.

[asked of all respondents; n=1,200]



Risks

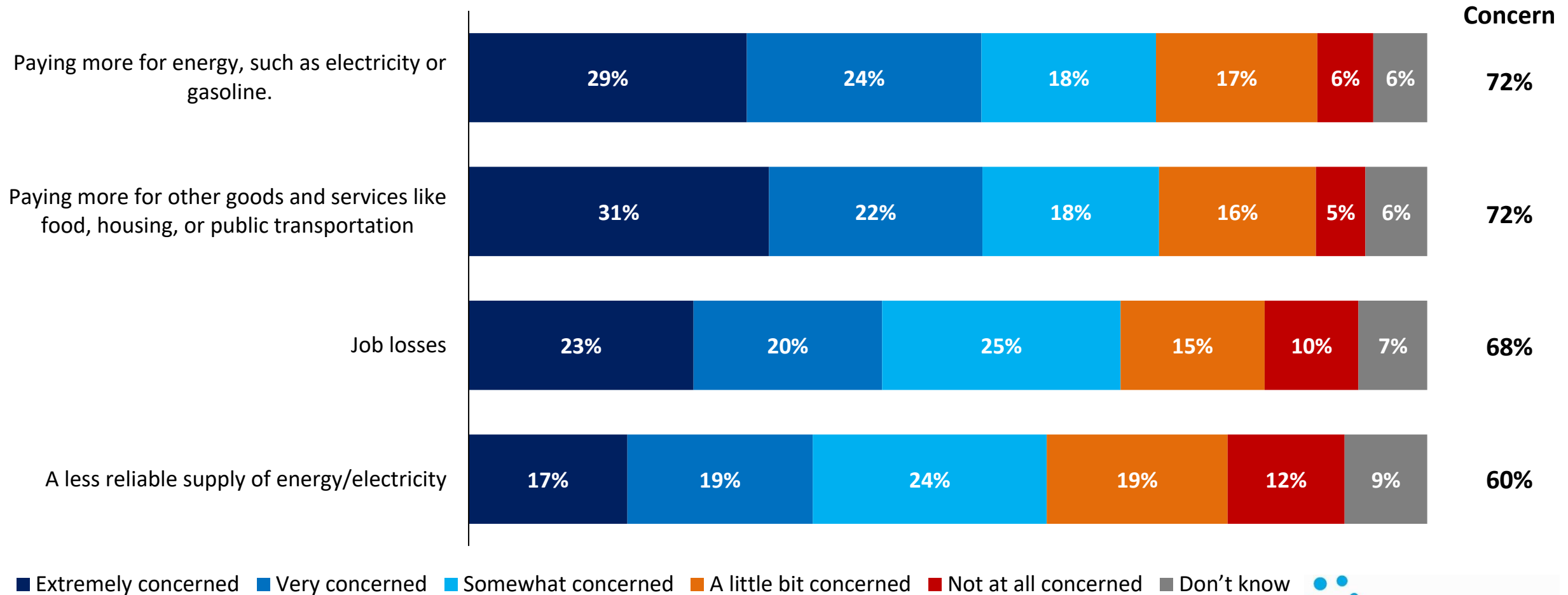
The background is a solid dark blue color. It features several light blue circles of varying sizes scattered across the page. The circles are thin-lined and do not have a fill. They are positioned in the upper right, center, and lower right areas of the image.

Risks: Canadians are most concerned about cost increases associated with fighting climate change



Reducing greenhouse gas emissions in Canada has a number of risks associated with it. How concerned are you about each of the following risks?

[asked of all respondents; n=1,200]



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. The circles are semi-transparent and do not overlap each other.

Methodology

These are the results of an online survey conducted between March 4th and 15th, 2022.

Method: This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Dynata, 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=1,437 general population, 18 years or older. The results are weighted to n=1,200 based on Census data from Statistics Canada.

Field Dates: March 4th to 15th, 2022.

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 (%) |
|--------------------|-------------------|-------------------|-----------------|-----------------|
| Men 18-34 | 138 | 9.7% | 173 | 14.6% |
| Men 35-54 | 209 | 14.6% | 194 | 16.3% |
| Men 55+ | 304 | 21.3% | 211 | 17.7% |
| Women 18-34 | 248 | 17.4% | 171 | 14.4% |
| Women 35-54 | 241 | 16.9% | 201 | 16.9% |
| Women 55+ | 287 | 20.1% | 238 | 20.0% |
| Region | | | | |
| BC | 208 | 14.5% | 163 | 13.6% |
| Alberta | 157 | 10.9% | 136 | 11.3% |
| Prairies | 107 | 7.4% | 78 | 6.5% |
| Ontario | 518 | 36.0% | 461 | 38.4% |
| Quebec | 341 | 23.7% | 281 | 23.4% |
| Atlantic | 106 | 7.4% | 82 | 6.8% |



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Building Understanding.