



Energy Transition

Public Opinion Research

Release Date: October 5, 2022

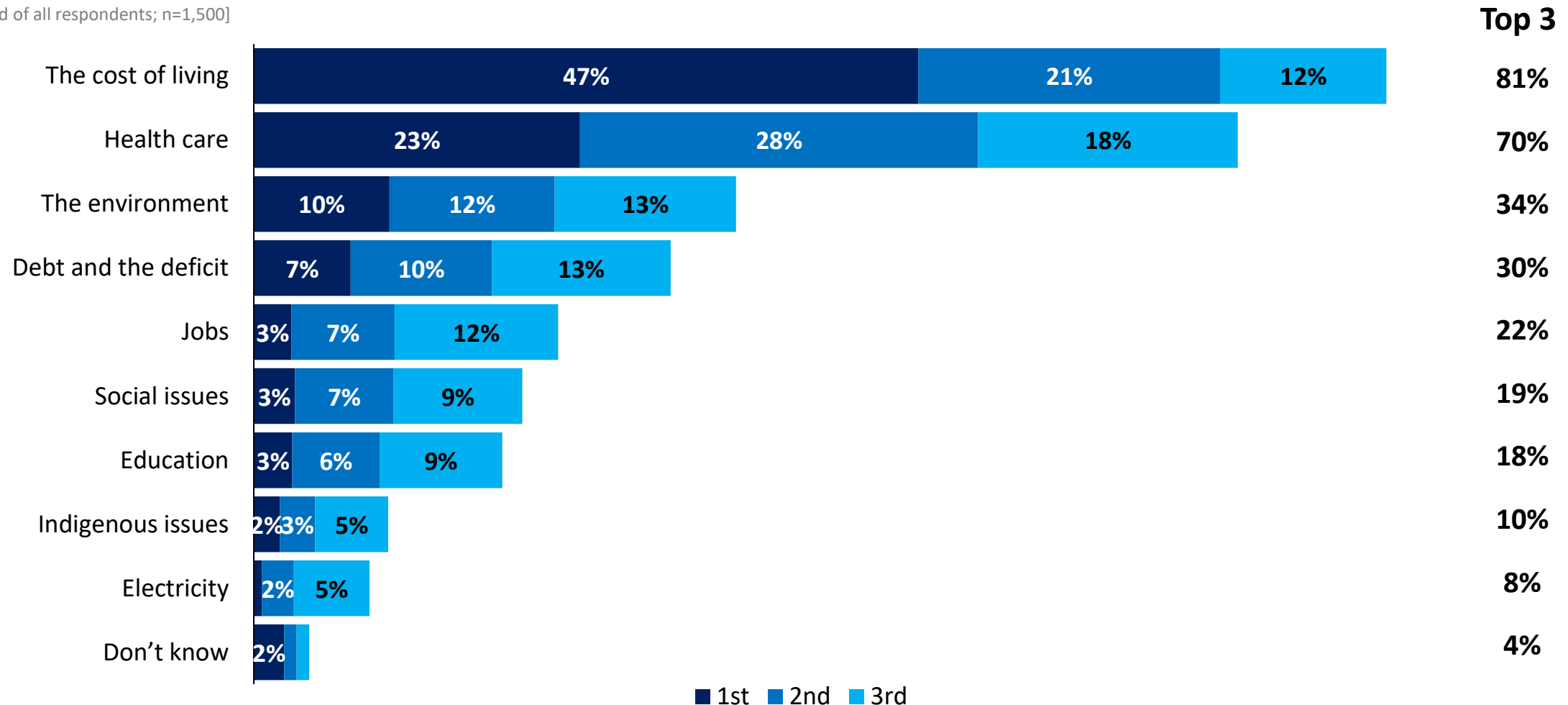
Field Dates: September 8, 2022, to September 21, 2022

Most Important Issue: Cost of living is the top issue in Canada, followed by health care; the environment is a distant third



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=1,500]

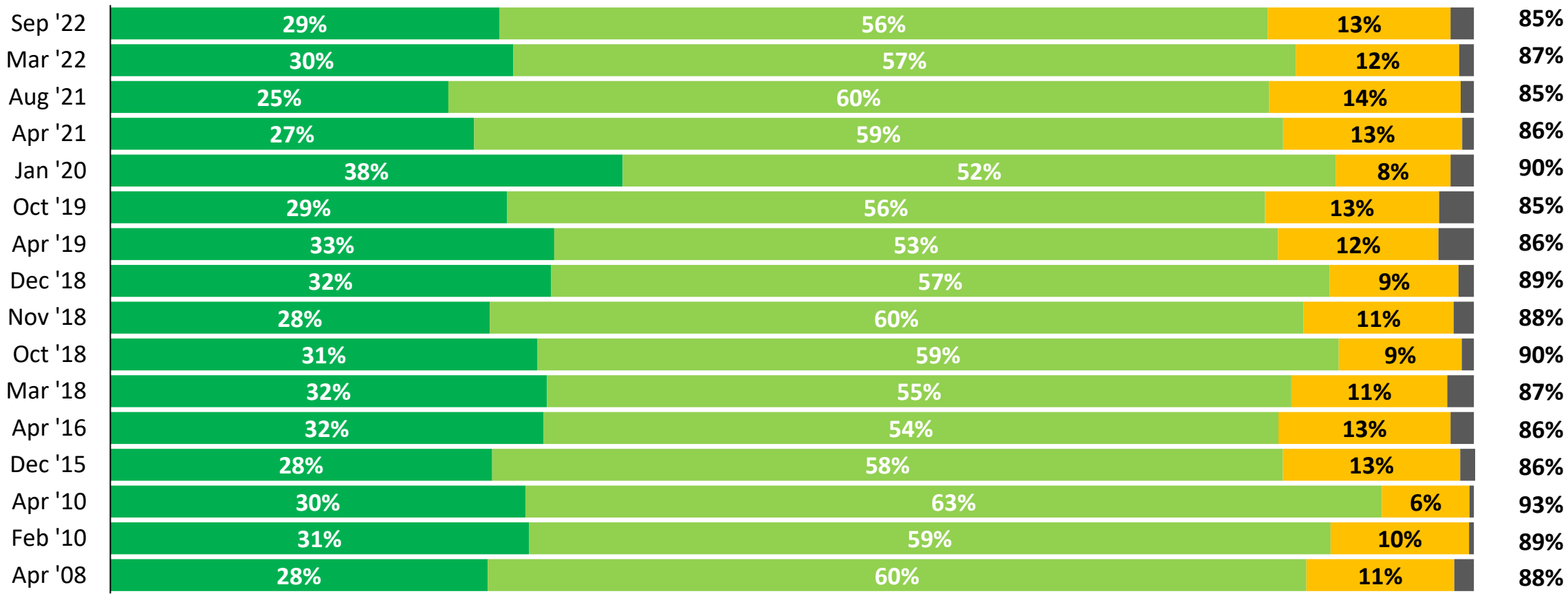


Familiarity with Climate Change: Familiarity with climate changes is stable with 29% saying they have a detailed understanding of it



How familiar are you with the concept of climate change?
[asked of all respondents; n=1,500]

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

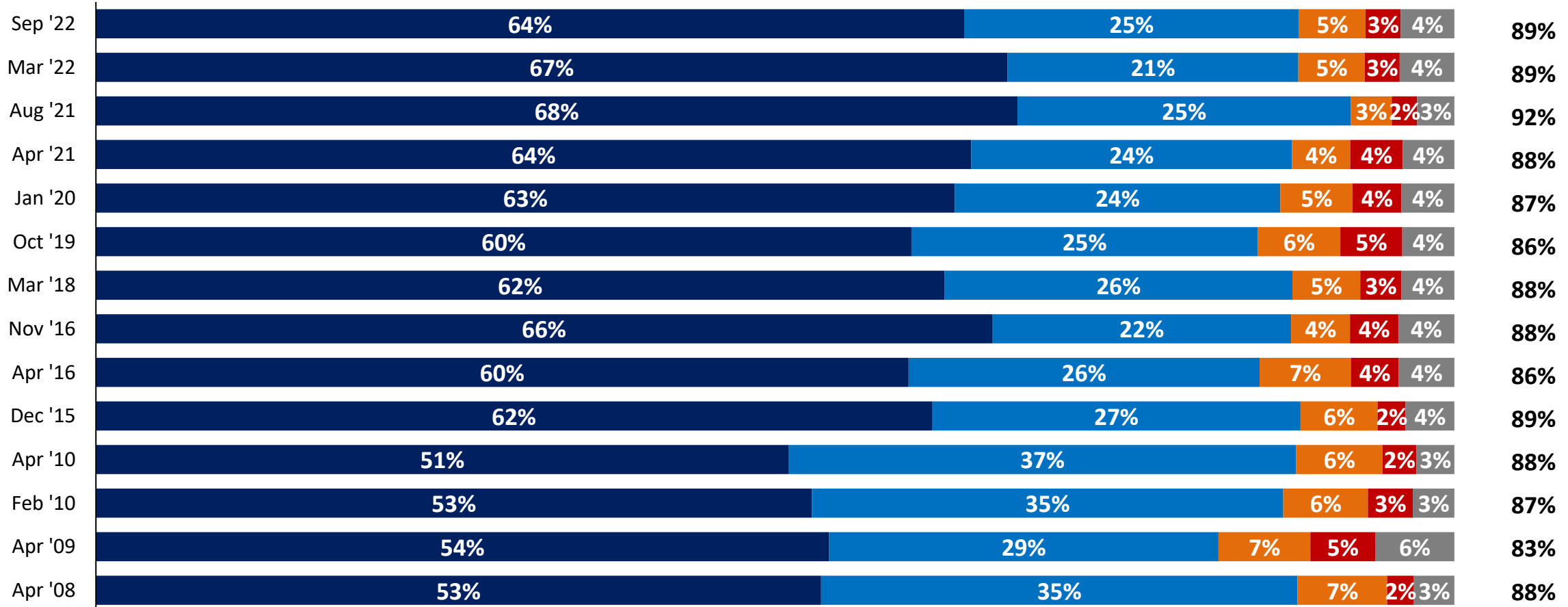
NOTE: Prior to 2010, the term "global warming" was used in place of "climate change"



Belief in Climate Change: Belief in climate change remains high but intensity has dropped to 64% from 67%

Q Thinking about your own personal view, do you believe that...
 [asked of all respondents; n=1,500]

At least probably occurring



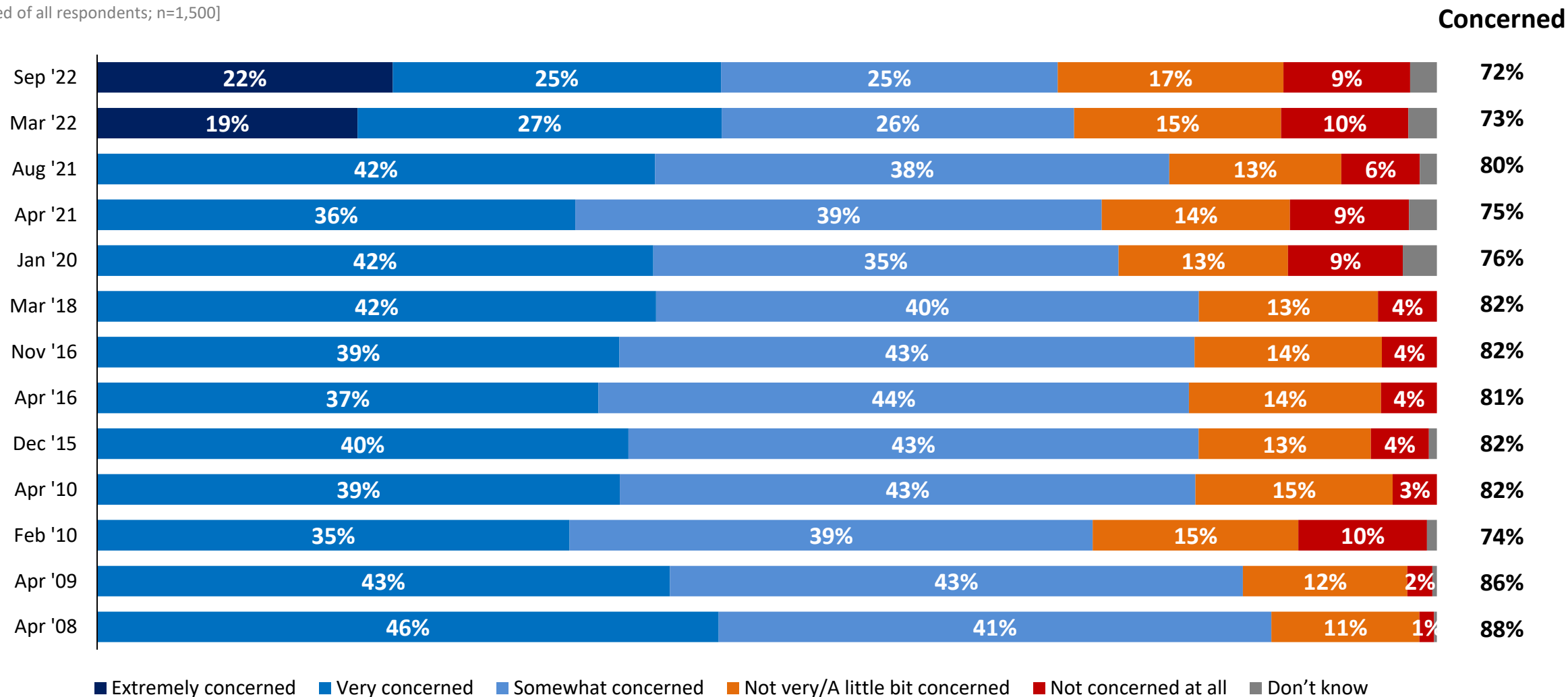
■ Climate change is definitely occurring
 ■ Climate change is probably occurring
 ■ Climate change is probably not occurring
■ Climate change is definitely not occurring
 ■ Don't know

Concern about Climate Change: Concern about climate change is steady since March, down from a peak in August 2021



How concerned are you about climate change?

[asked of all respondents; n=1,500]



Note: 'Extremely concerned' was recently added in March 2022.

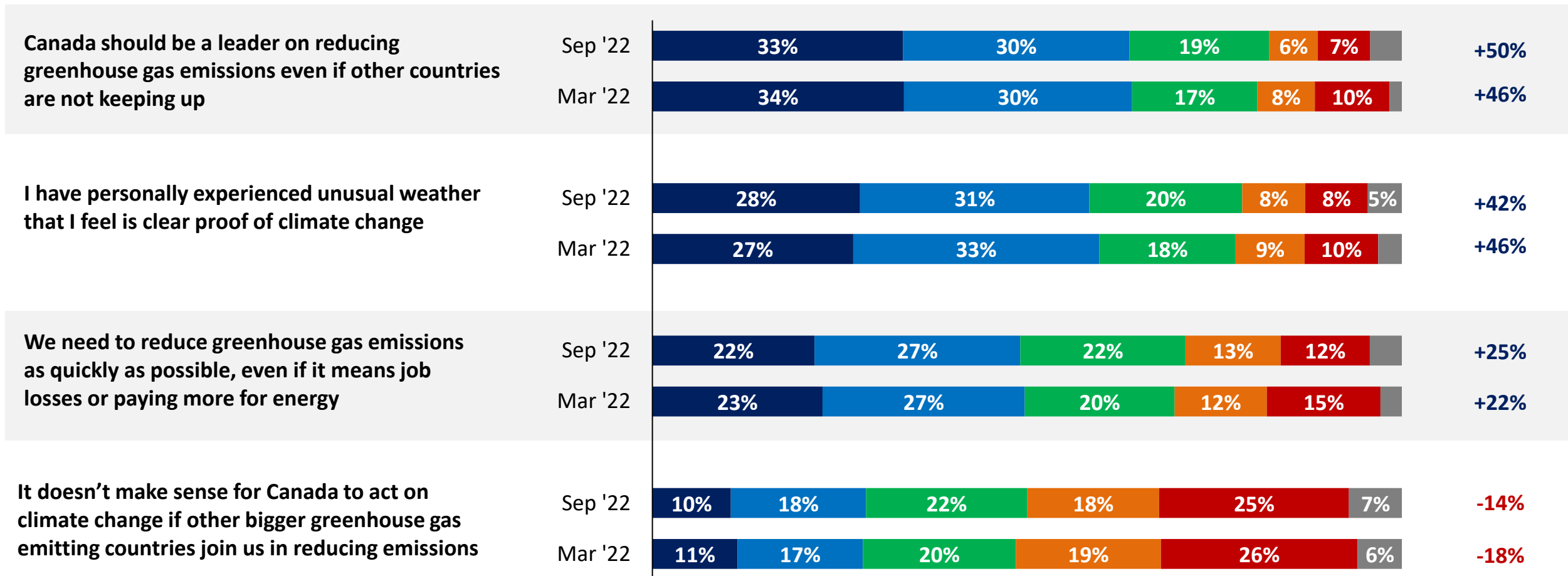
Attitudes: Net agreement that Canada should be a leader on reducing GHG emissions is up to +50% from +46% in March



Do you agree or disagree with the following statements?

[asked of all respondents; n=1,500]

Net Agree



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



Energy Transition

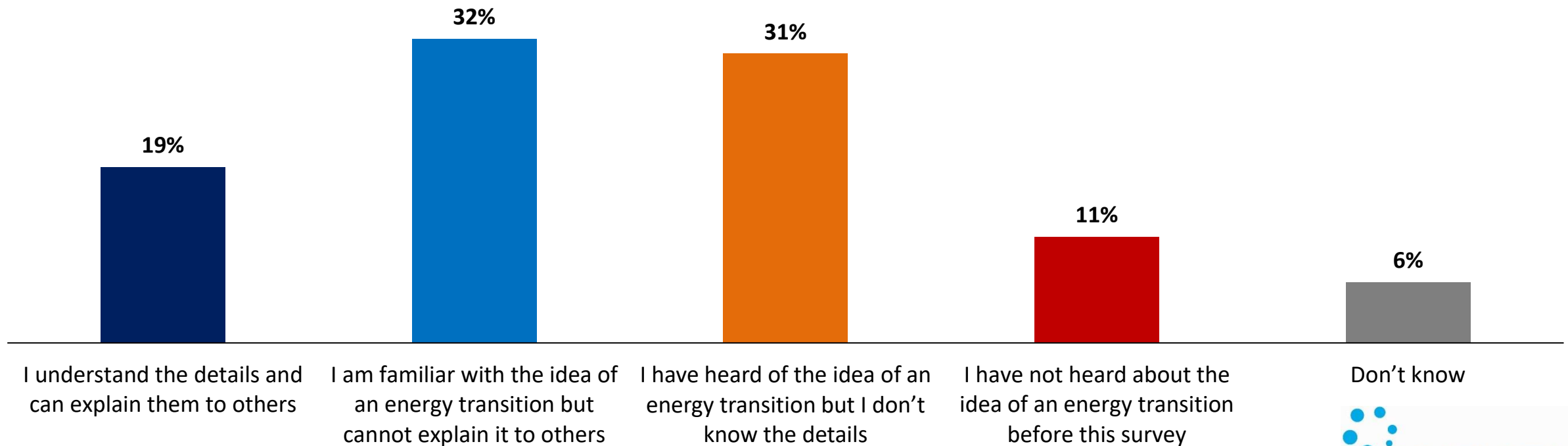
Energy Transition: Just over half (51%) say they are familiar with the idea of an energy transition



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=1,500]



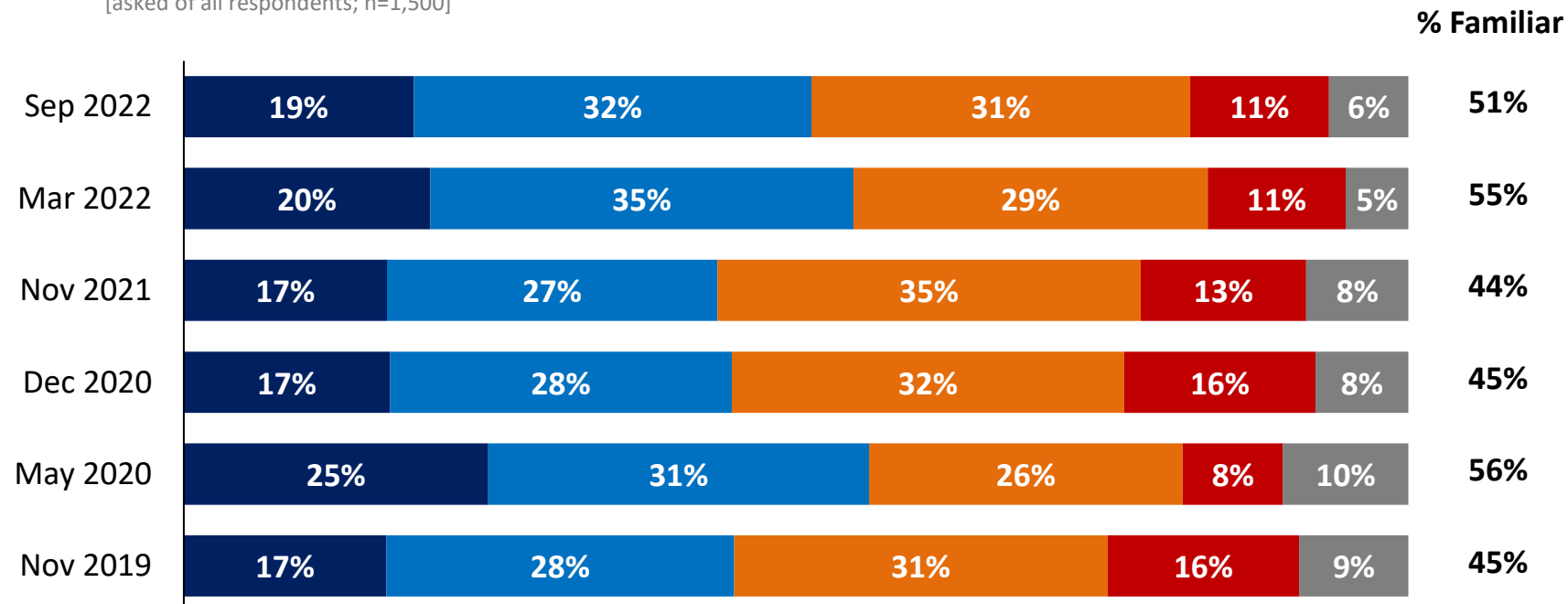
Energy Transition Familiarity: Familiarity is down since March from 55% to 51%; highest in Alberta



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=1,500]

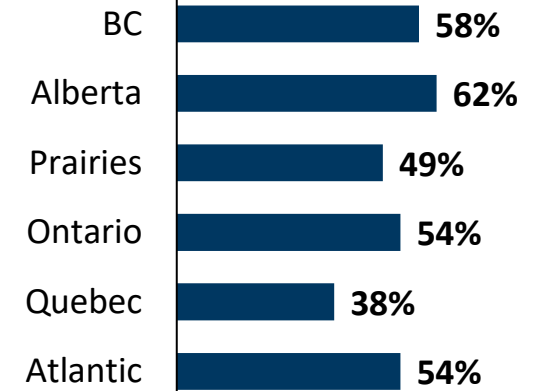


- I understand the details and can explain them to others
- I am familiar with the idea of an energy transition but cannot explain it to others
- I have heard of the idea of an energy transition but I don't know the details
- I have not heard about the idea of an energy transition before this survey
- Don't know

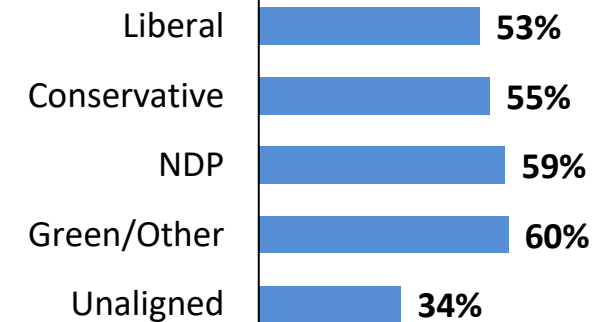
Sample Breakdown (current wave)

Those who say they are "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 it is critical for Canada's prosperity to responsibly develop oil and gas resources

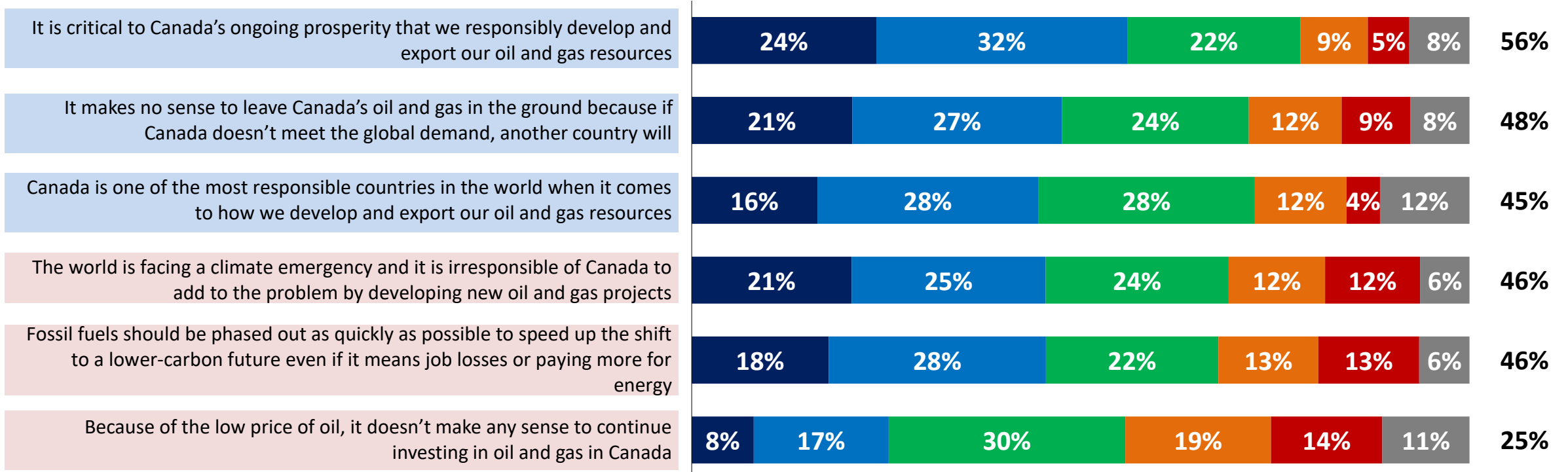
To fully understand Canadians' attitudes towards oil/gas developments, we ask respondents to react to a series of agree and disagree statements on energy transition from a wide range of perspectives.

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=1,500]



Pro-oil statements

Pro-transition statements

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

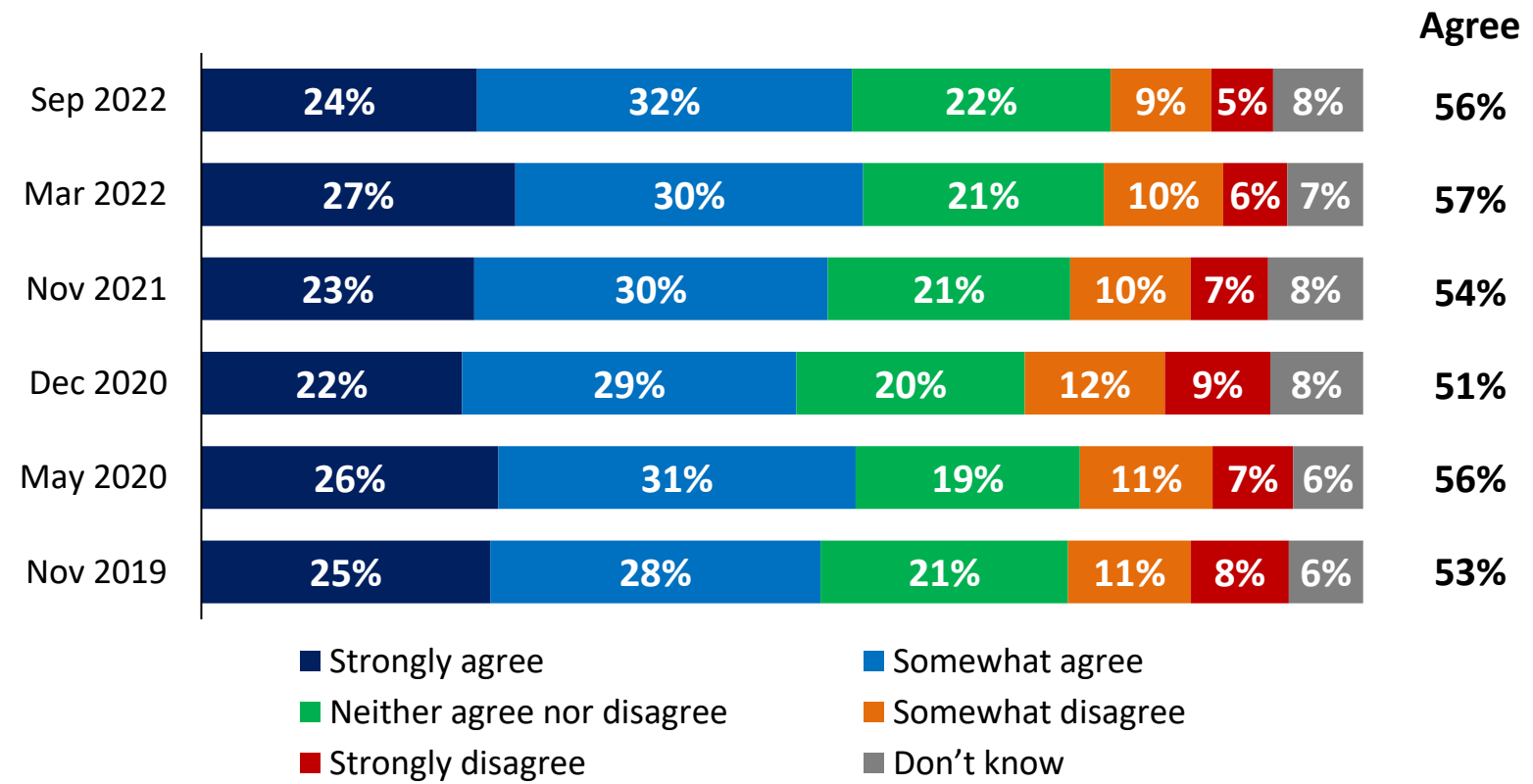


Ongoing Prosperity: Agreement is highest in Alberta and the Prairies, as well as among Conservative partisans



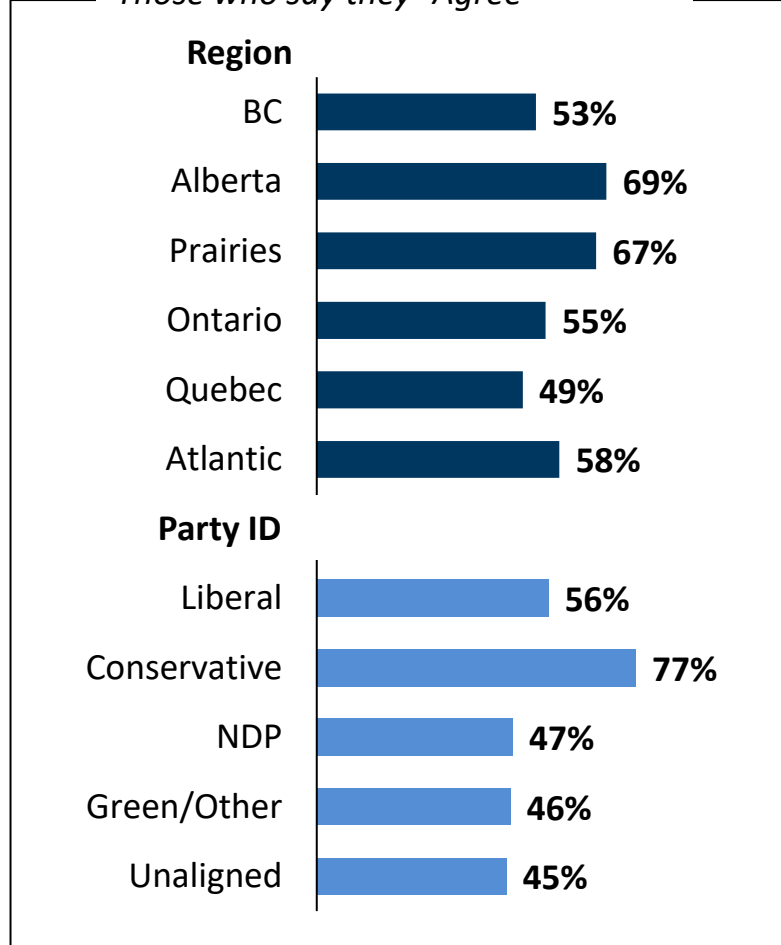
Do you agree or disagree with the following statements?
[asked of all respondents; n=1,500]

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"

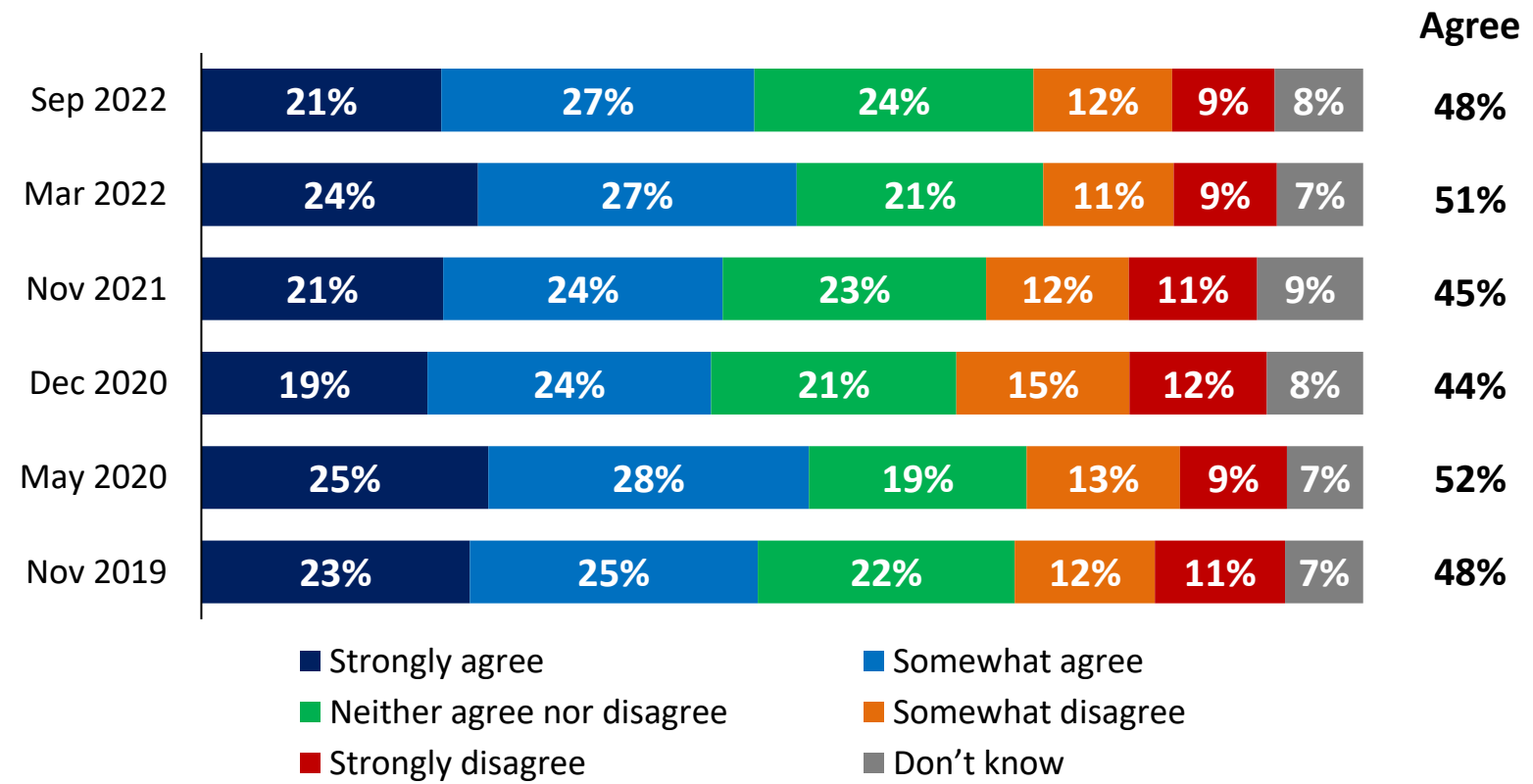


Shouldn't Leave Oil/Gas in the Ground: Agreement is down from a high of 51% in March to 48% now



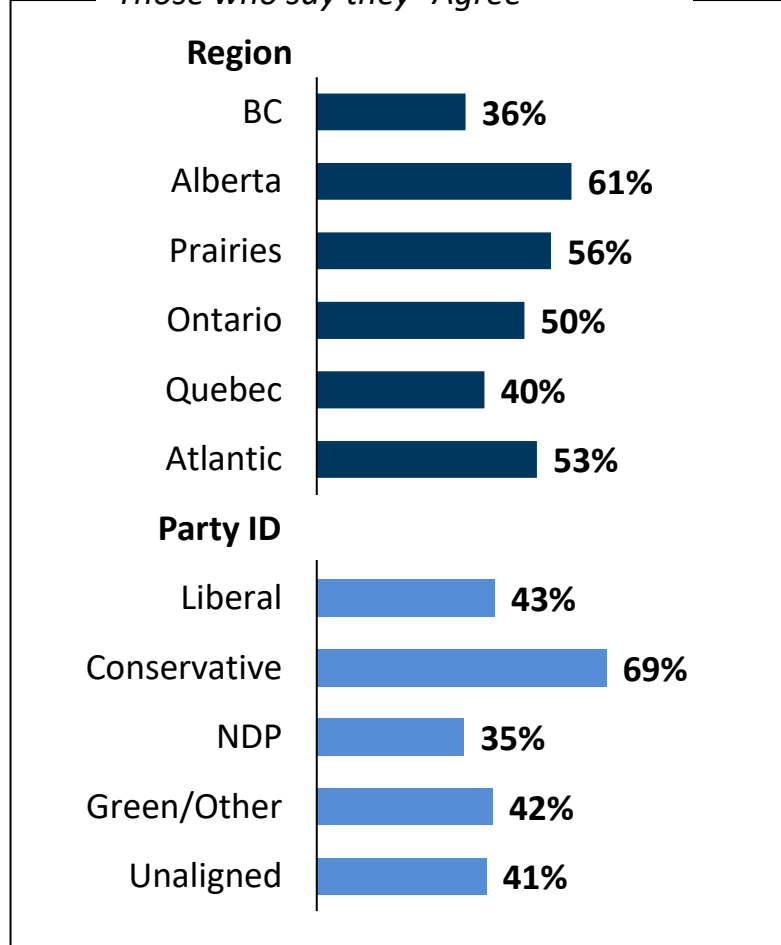
Do you agree or disagree with the following statements?
[asked of all respondents; n=1,500]

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"

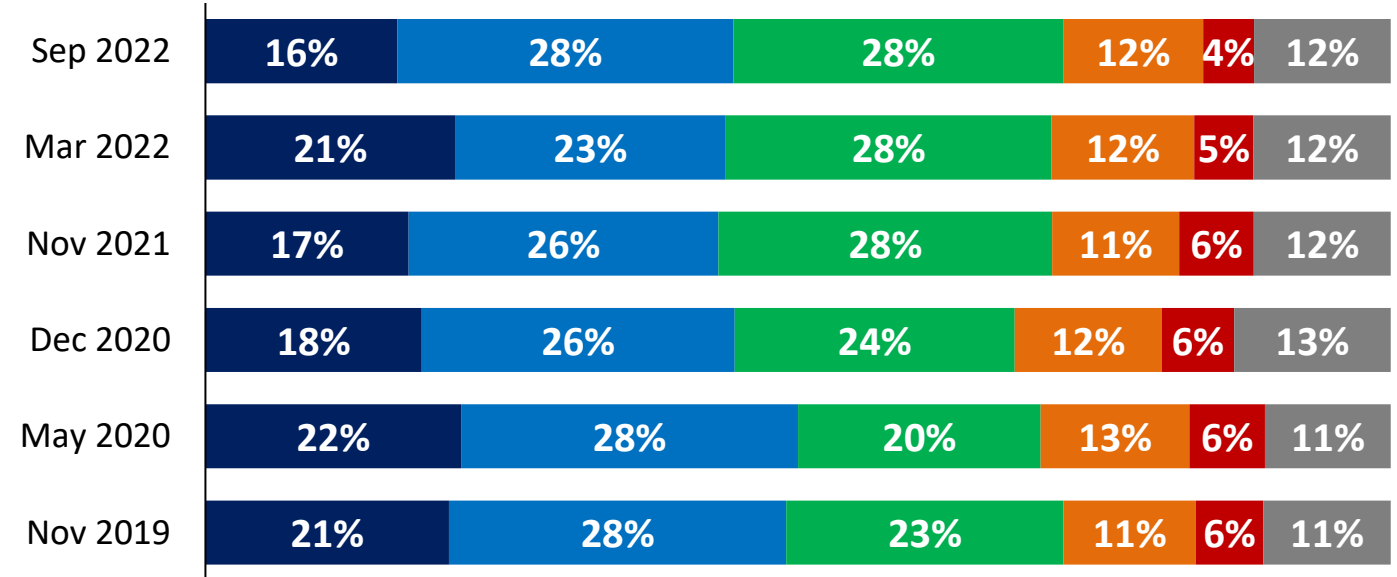


As a Responsible Country: Just over 4-in-10 agree that Canada is one of the most responsible countries when it comes to oil and gas



Do you agree or disagree with the following statements?
[asked of all respondents; n=1,500]

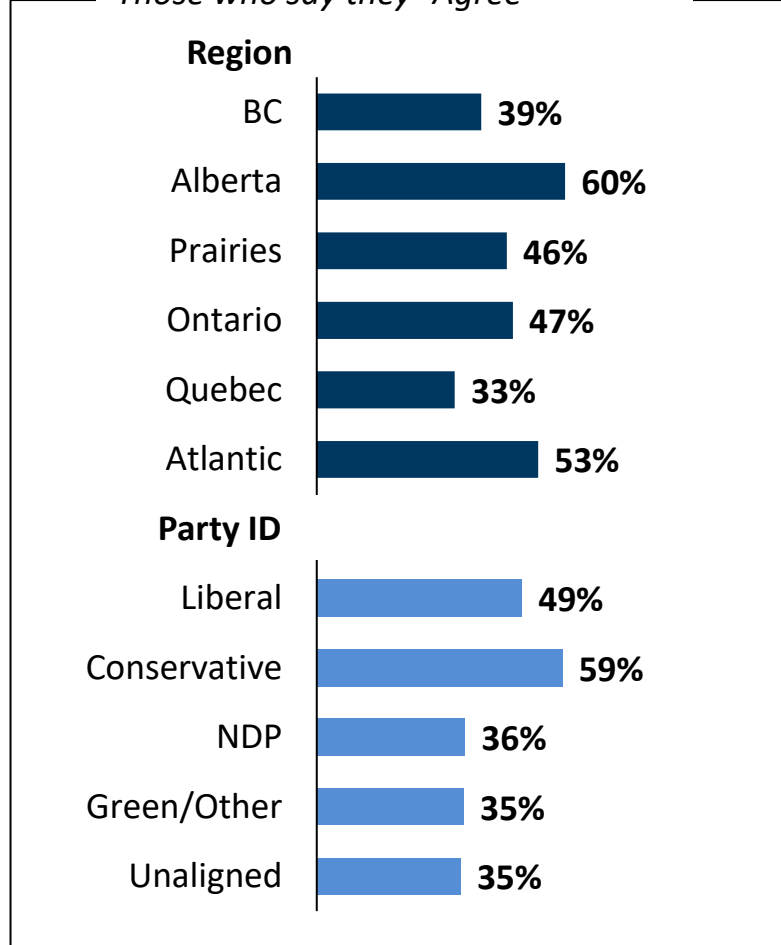
Canada is one of the most responsible countries in the world when it comes to how we develop and export our oil and gas resources



Agree
45%

Sample Breakdown (current wave)

Those who say they "Agree"

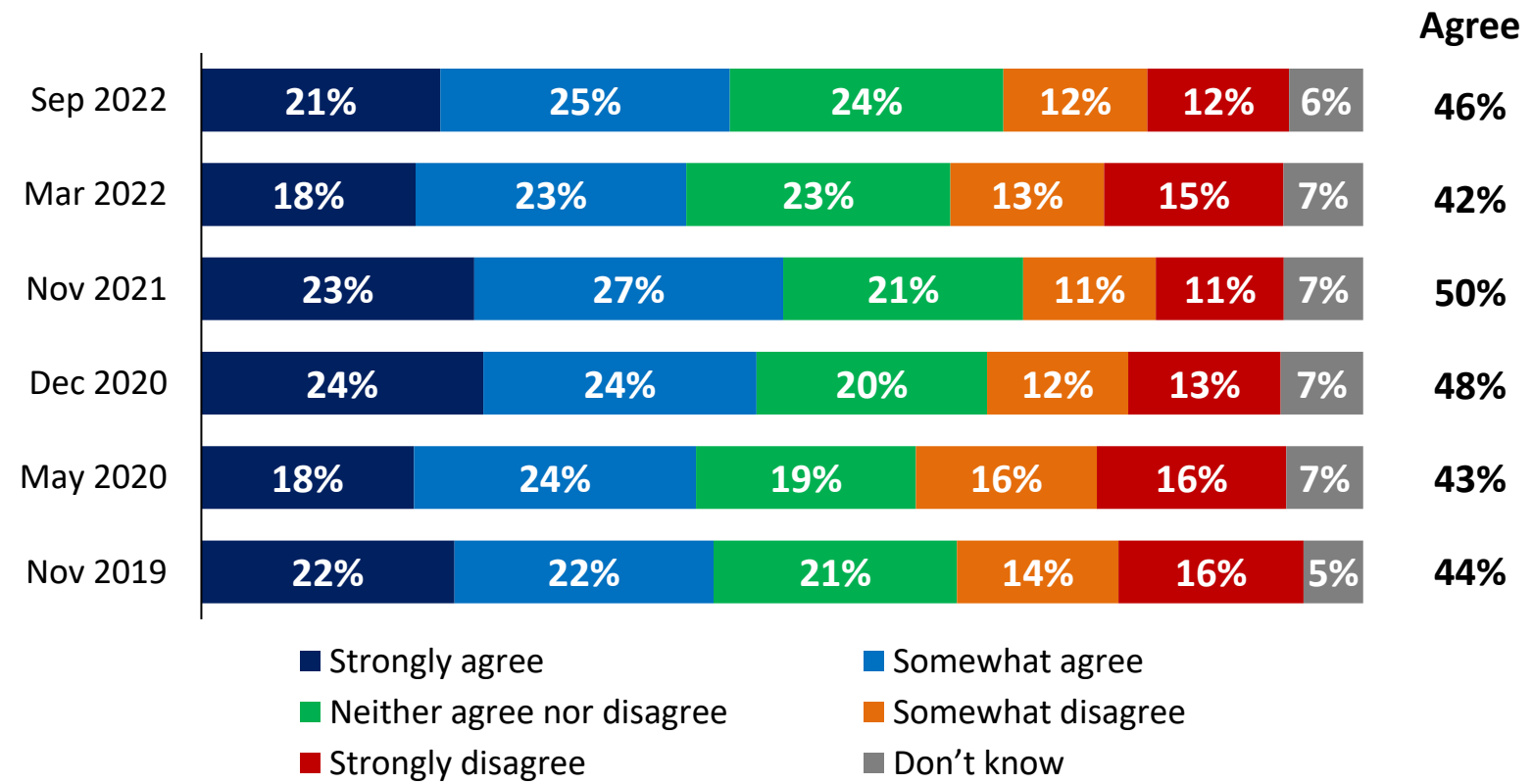


Irresponsible to Develop Oil/Gas: Agreement that it is irresponsible of Canada to develop oil and gas is up since March



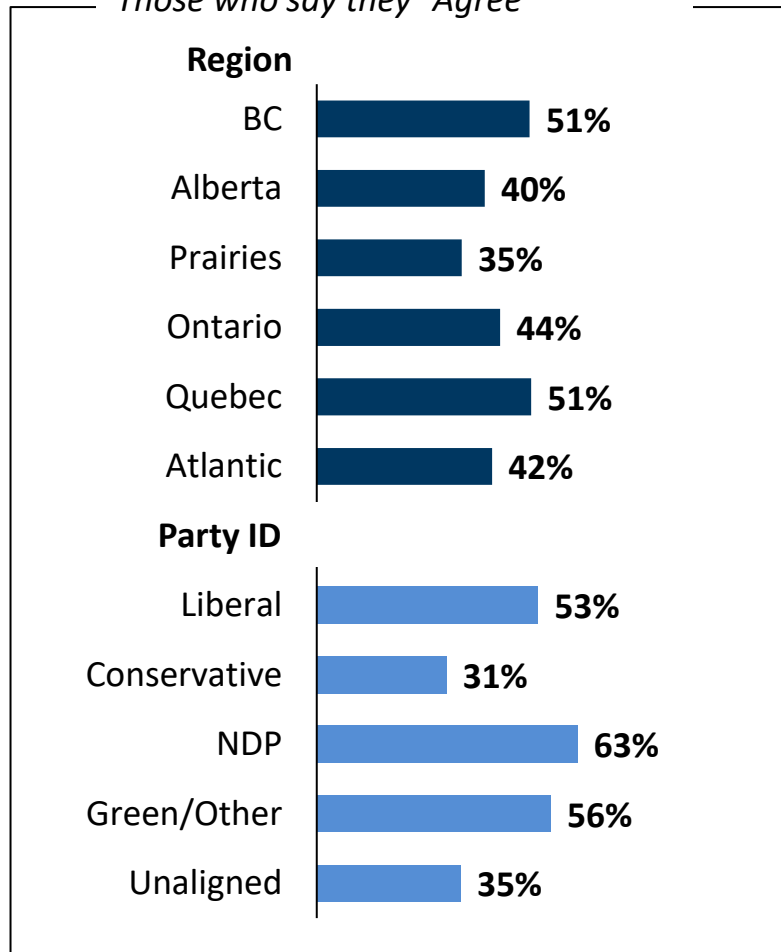
Do you agree or disagree with the following statements?
[asked of all respondents; n=1,500]

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"

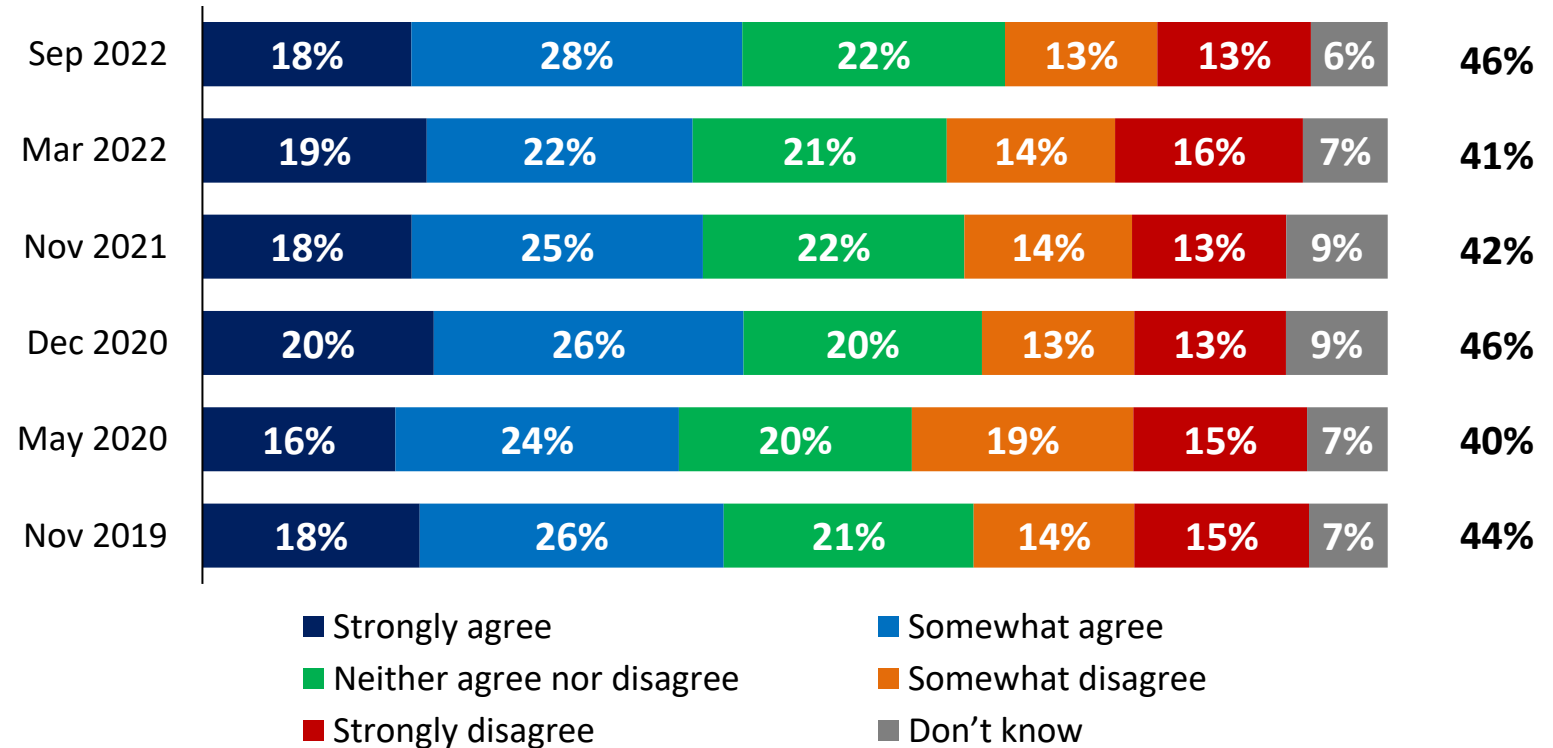


Quickly Phase out Fossil Fuels: Just under half (46%) agree; highest among NDP and Liberal voters



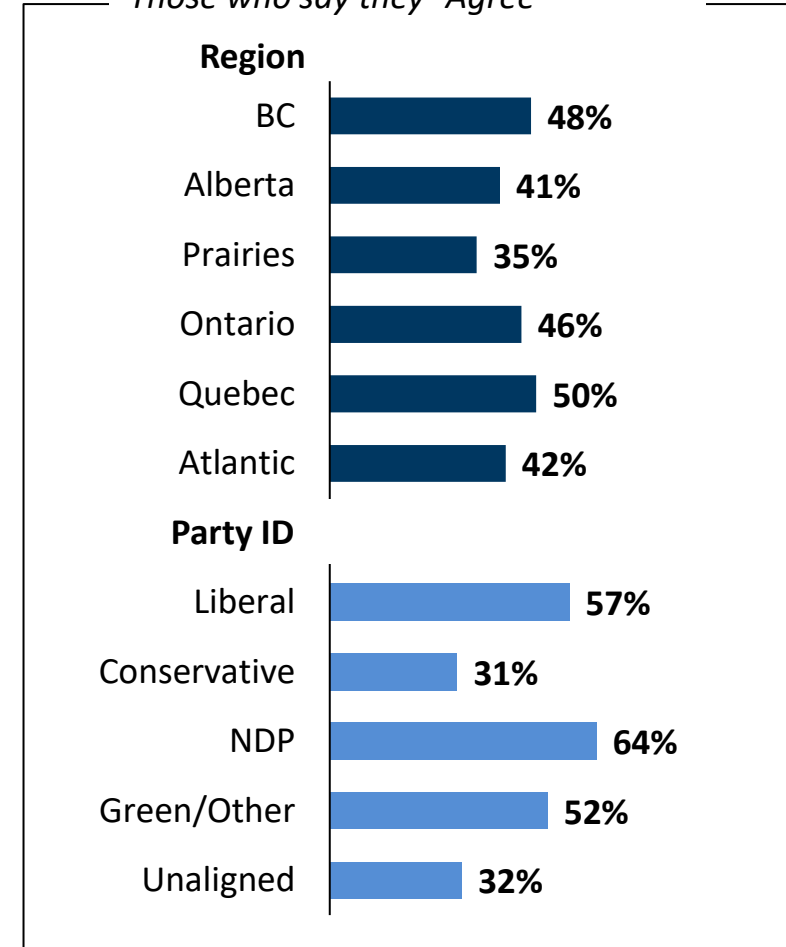
Do you agree or disagree with the following statements?
[asked of all respondents; n=1,500]

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"



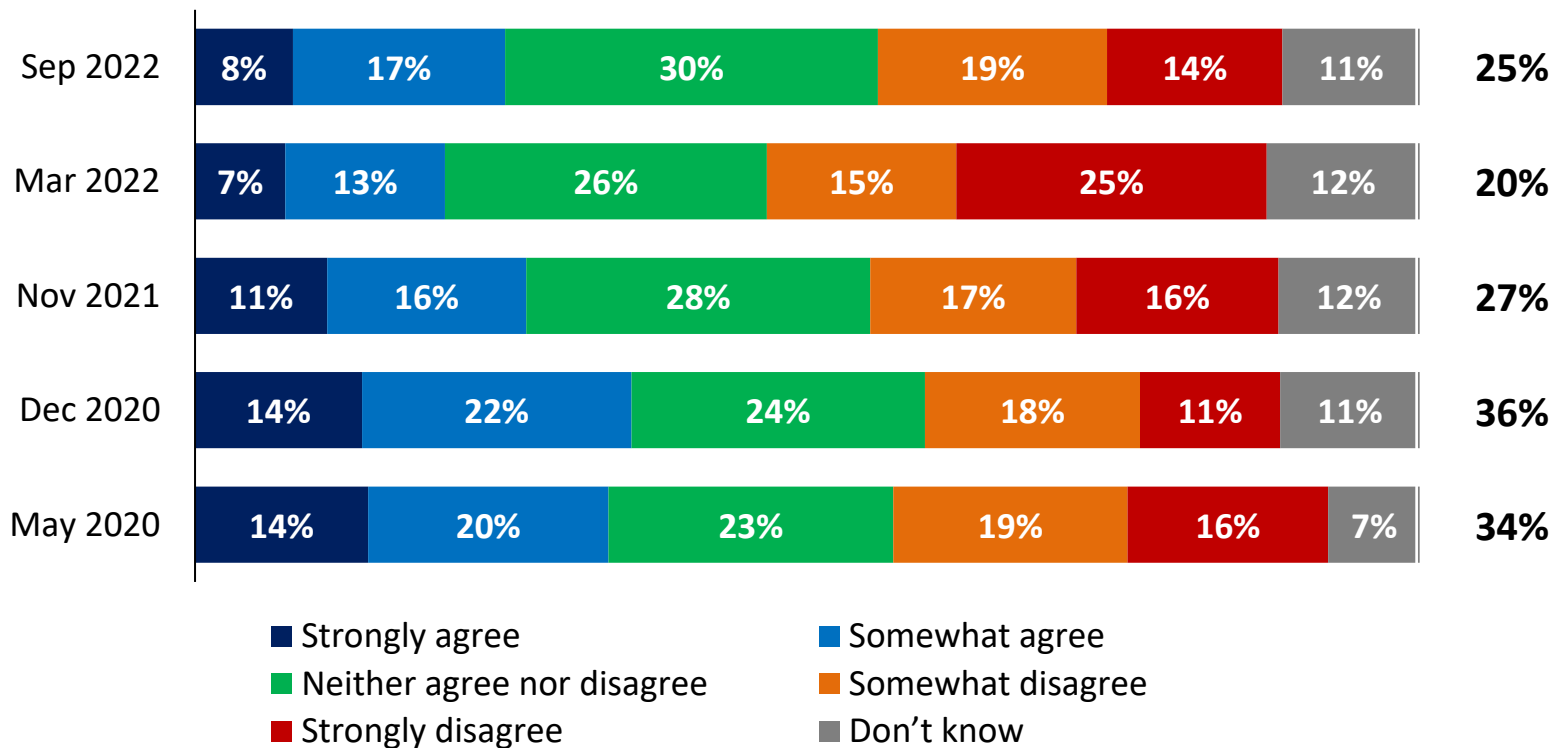
Make No Sense to Invest in Oil/Gas: Agreement is highest in BC and Quebec, lowest in the Prairies



Do you agree or disagree with the following statements?

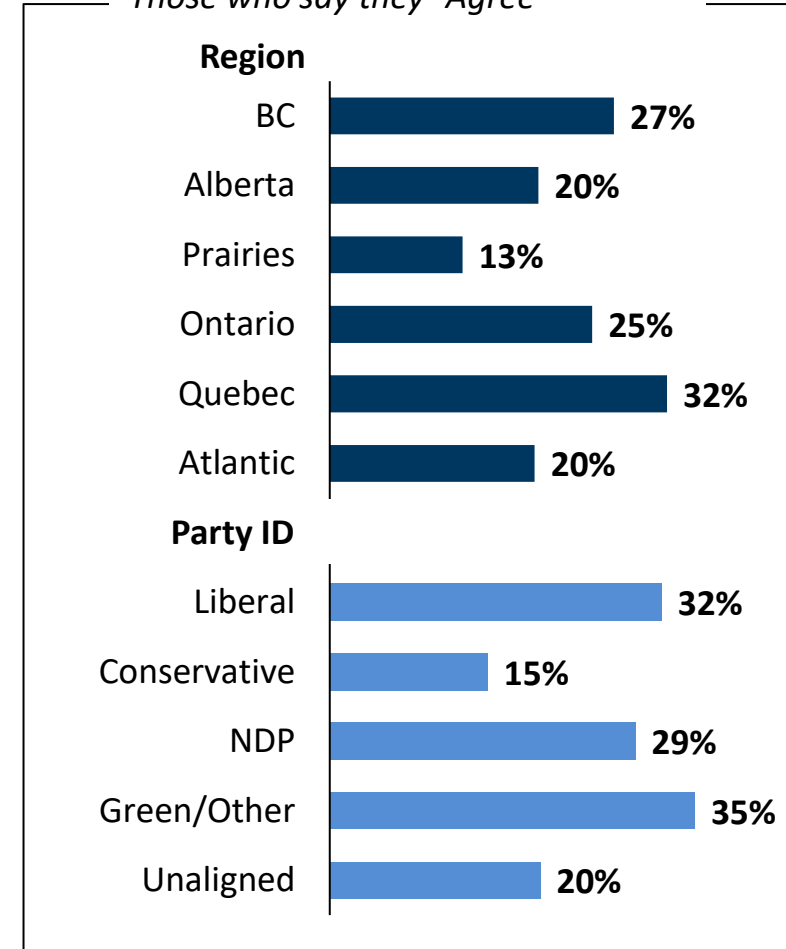
[asked of all respondents; n=1,500]

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.

Energy Transition: A plurality (39%) say that accelerating the transition shows Canada is a leader, makes the world better for future generations



Based on what you know about an energy transition, which of the following statements is closest to your point of view?

[asked of all respondents; n=1,500]

39%



Government policies to accelerate the transition away from oil and gas show Canada is a leader on climate change and help make the world better for future generations.

34%



Government policies to accelerate the transition away from oil and gas risk increasing the cost of living and losing jobs in Canada, and aren't likely to have a significant impact on climate change.

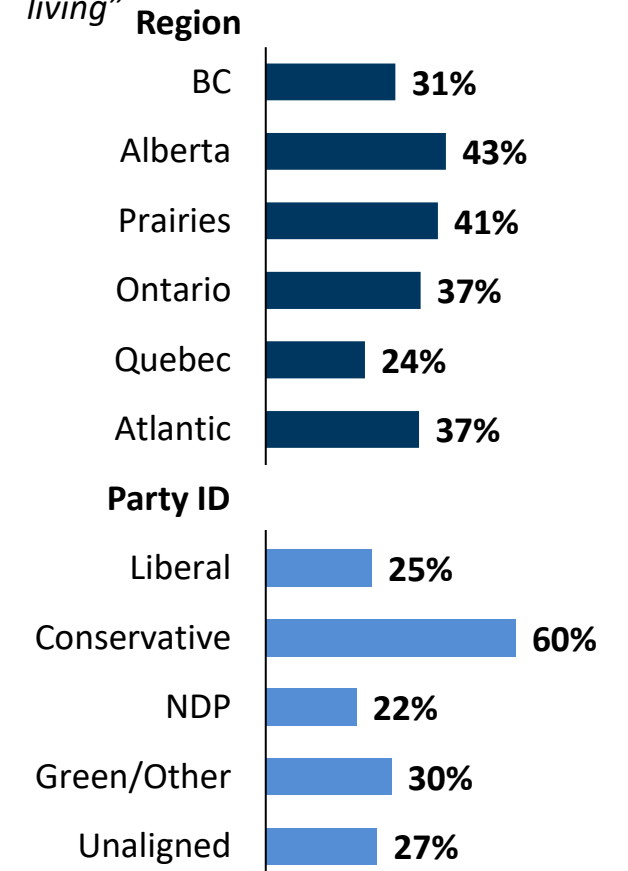
27%



Don't know

Sample Breakdown

Those who say "Increasing the cost of living"

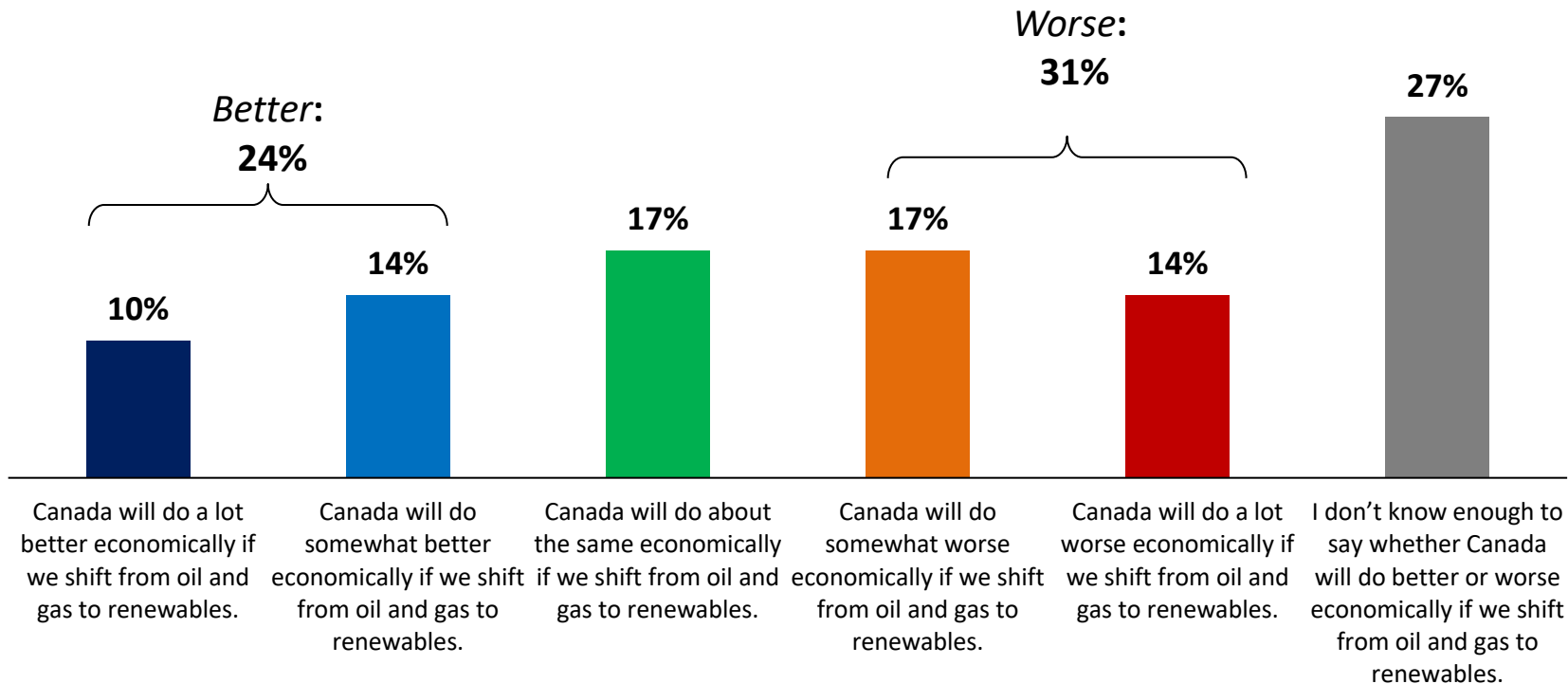


Shift to Renewable Energy: Just under 1-in-3 say that shifting to renewable energy will make Canada's economy worse; 27% unsure



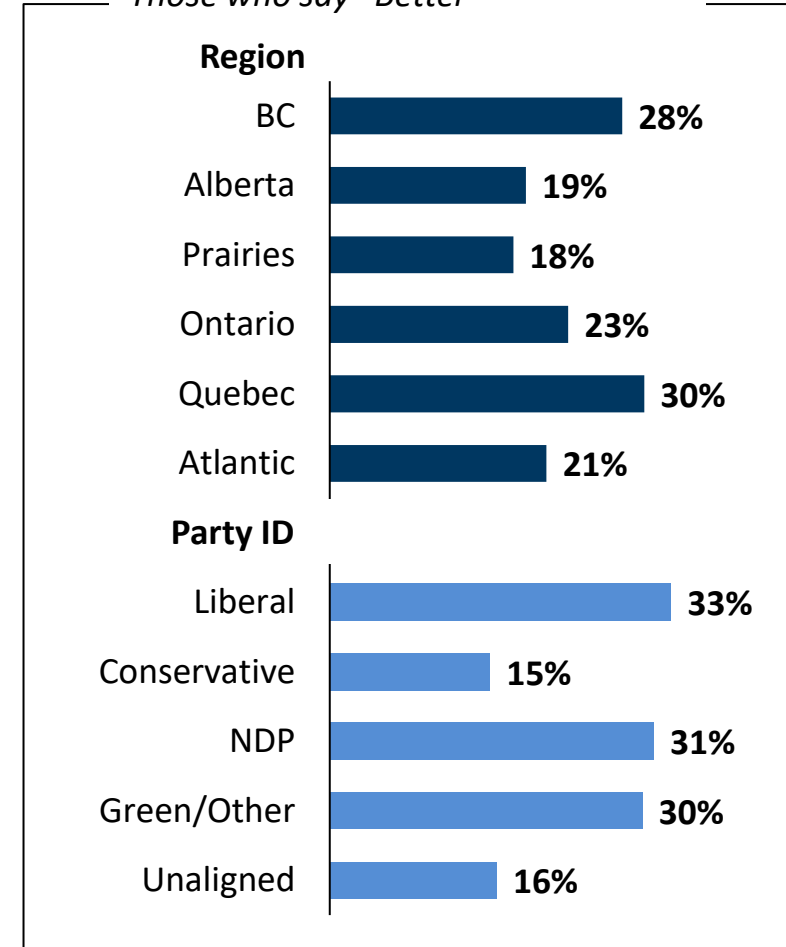
What do you think the economic impact will be on Canada if we shift from oil and gas to renewable energy?

[asked of all respondents; n=1,500]



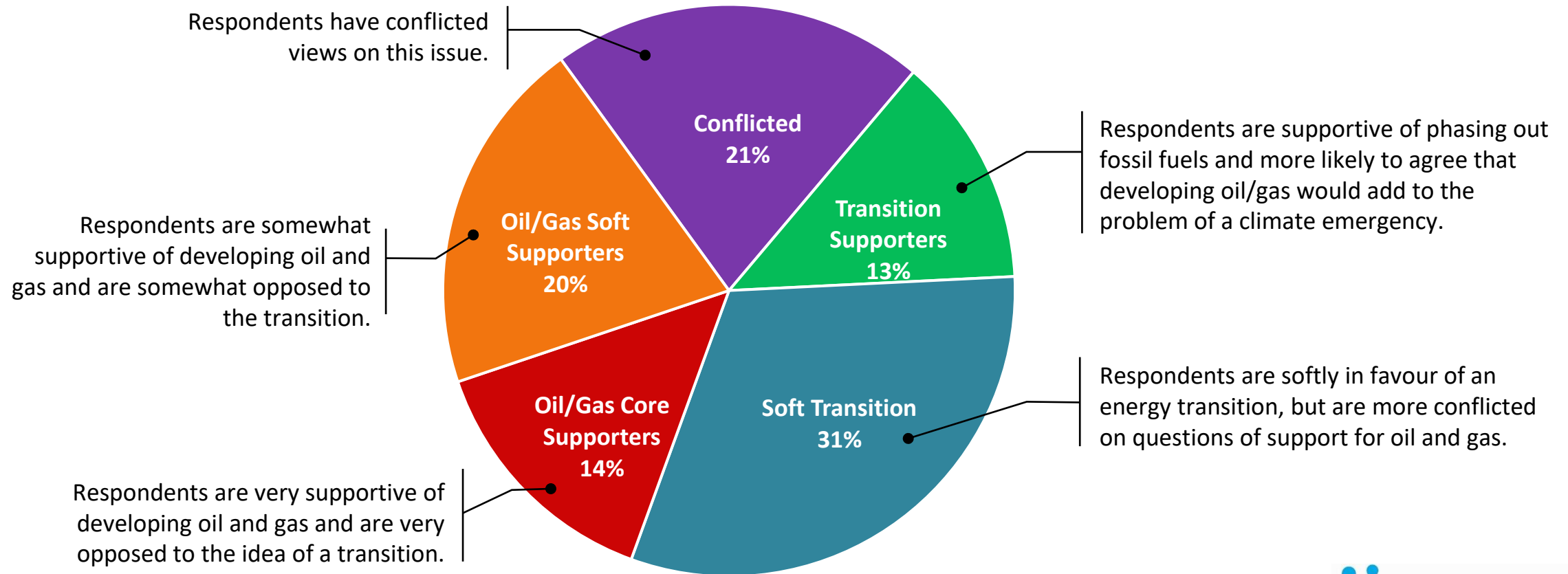
Sample Breakdown

Those who say "Better"



Transition Cluster: The plurality of Canadians are soft transition supporters (31%) followed by 21% who 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.



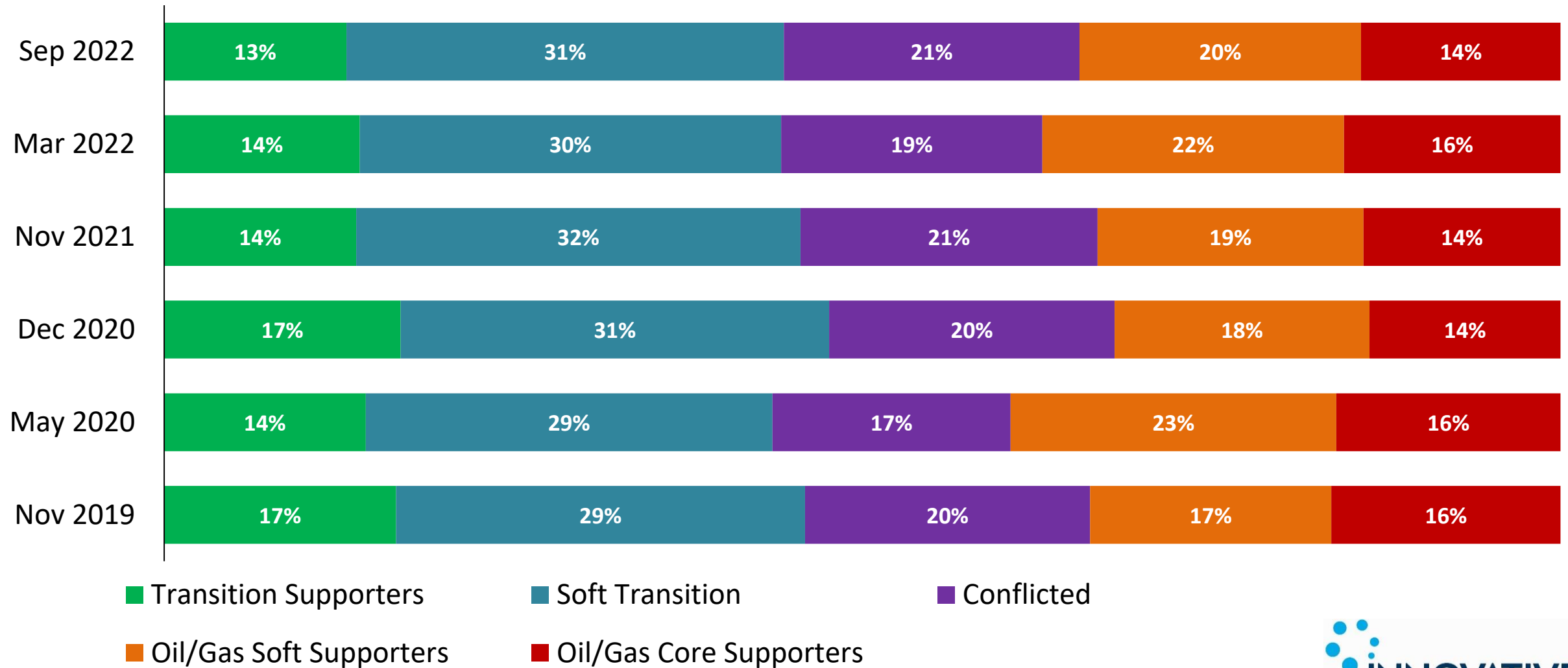
Defining the Transition Clusters

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	-63%	+9%	+77%	+85%	+98%
	Shouldn't leave oil/gas in the ground	-86%	-10%	+48%	+87%	+95%
	We develop oil/gas responsibly	-30%	-1%	+54%	+57%	+67%
Move Away from Oil/Gas Developments	Irresponsible to develop oil/gas	+99%	+7%	+93%	-1%	-96%
	Quickly phase out fossil fuels	+98%	+5%	+91%	-1%	-97%
	Make no sense to invest in oil/gas	+51%	-8%	+54%	-52%	-90%

Transition Cluster Tracking: Oil and gas supporter groups are now smaller than they were in March

Transition Cluster Tracking



Carbon Tax

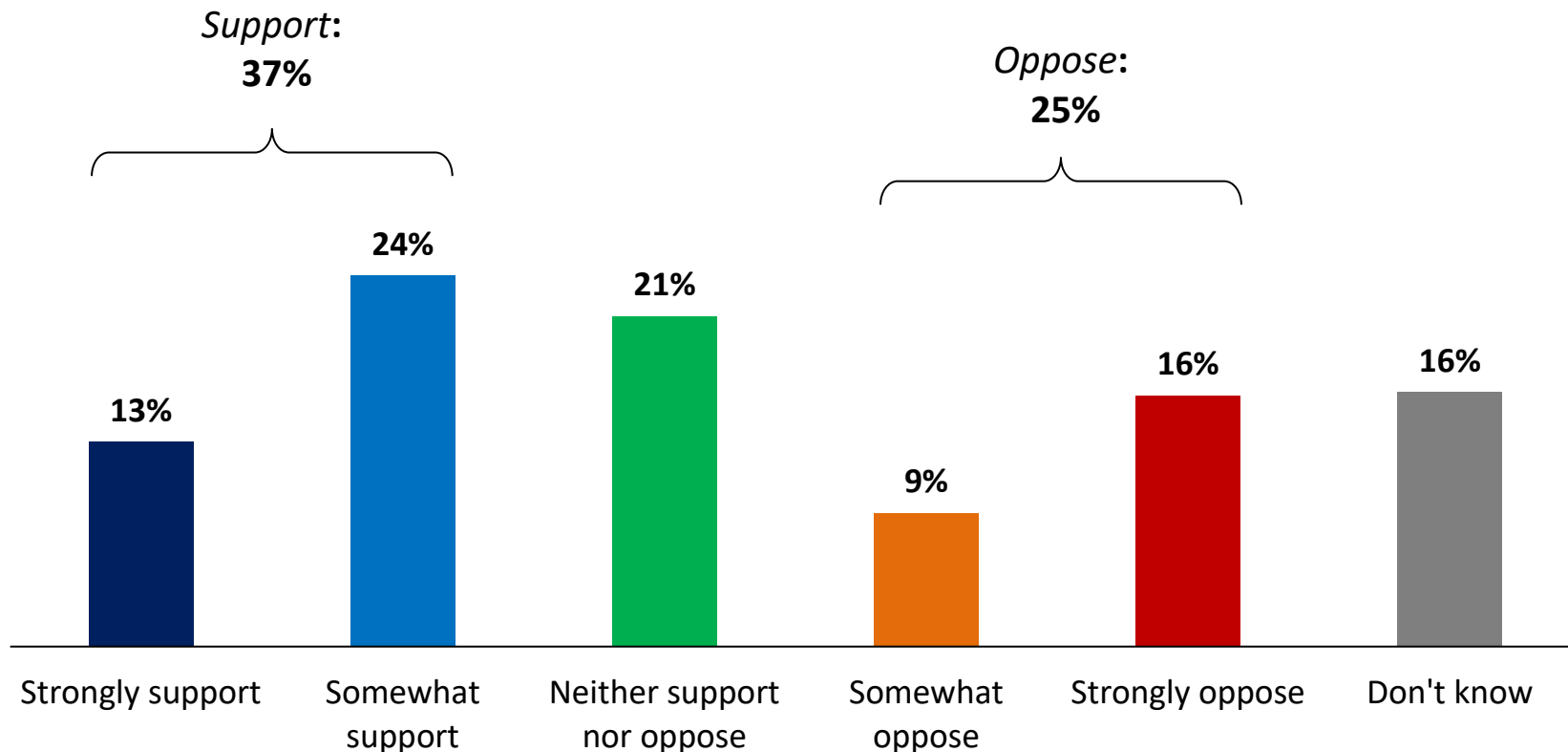
General Support for Carbon Tax: A plurality support the idea of a carbon tax; highest among Liberal and NDP partisans



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

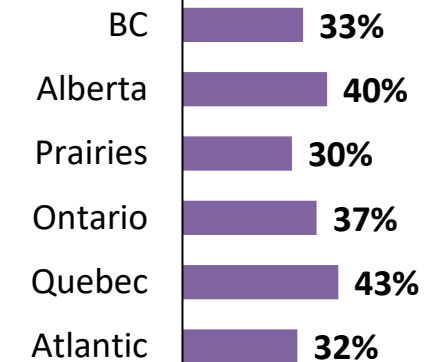
[asked of all respondents; n=1,500]

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.

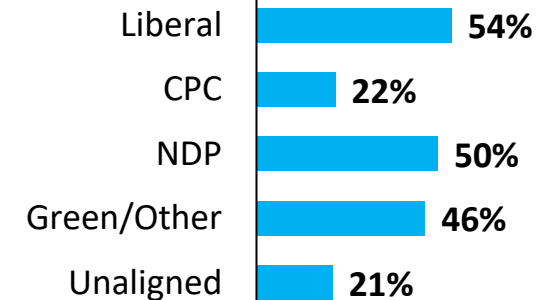


Segmentation Net Support

Region



Party ID



Tracking General Support for Carbon Tax: Net support remains well below where it was in August of 2021

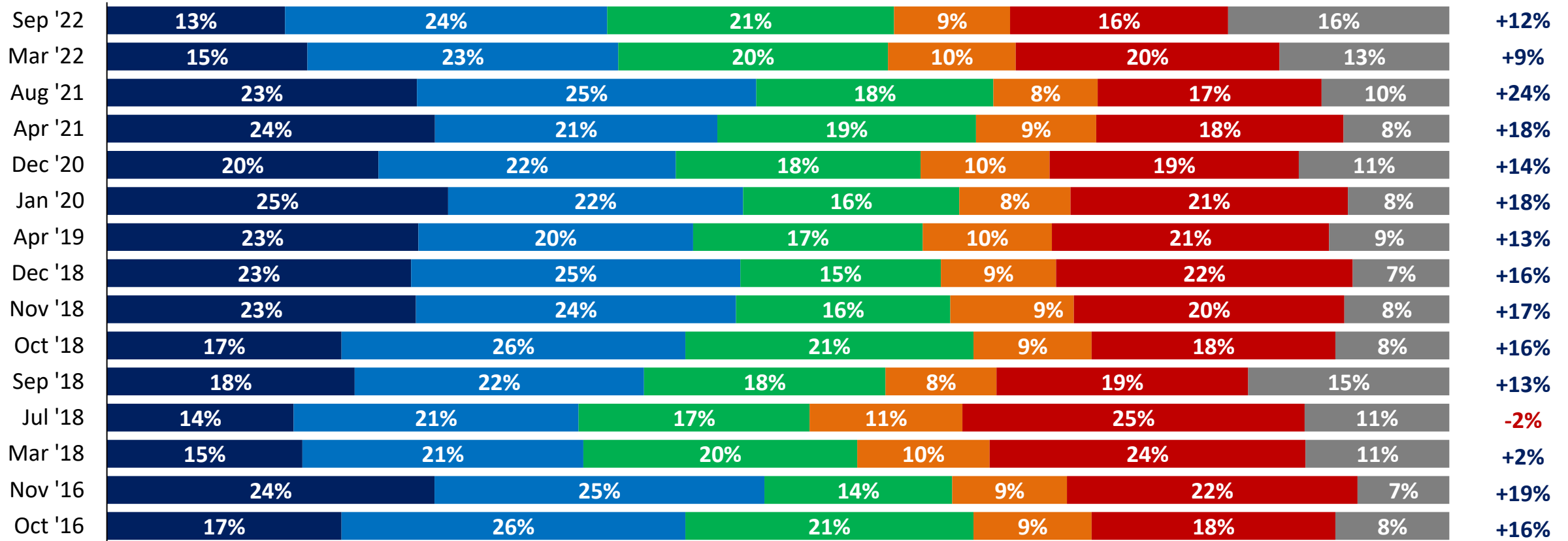


Do you support or oppose the federal government implementing the following policy?

[asked of all respondents; n=1,500]

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.

Net Support



■ Strongly support
 ■ Somewhat support
 ■ Neither support nor oppose
■ Somewhat oppose
 ■ Strongly oppose
 ■ Don't know



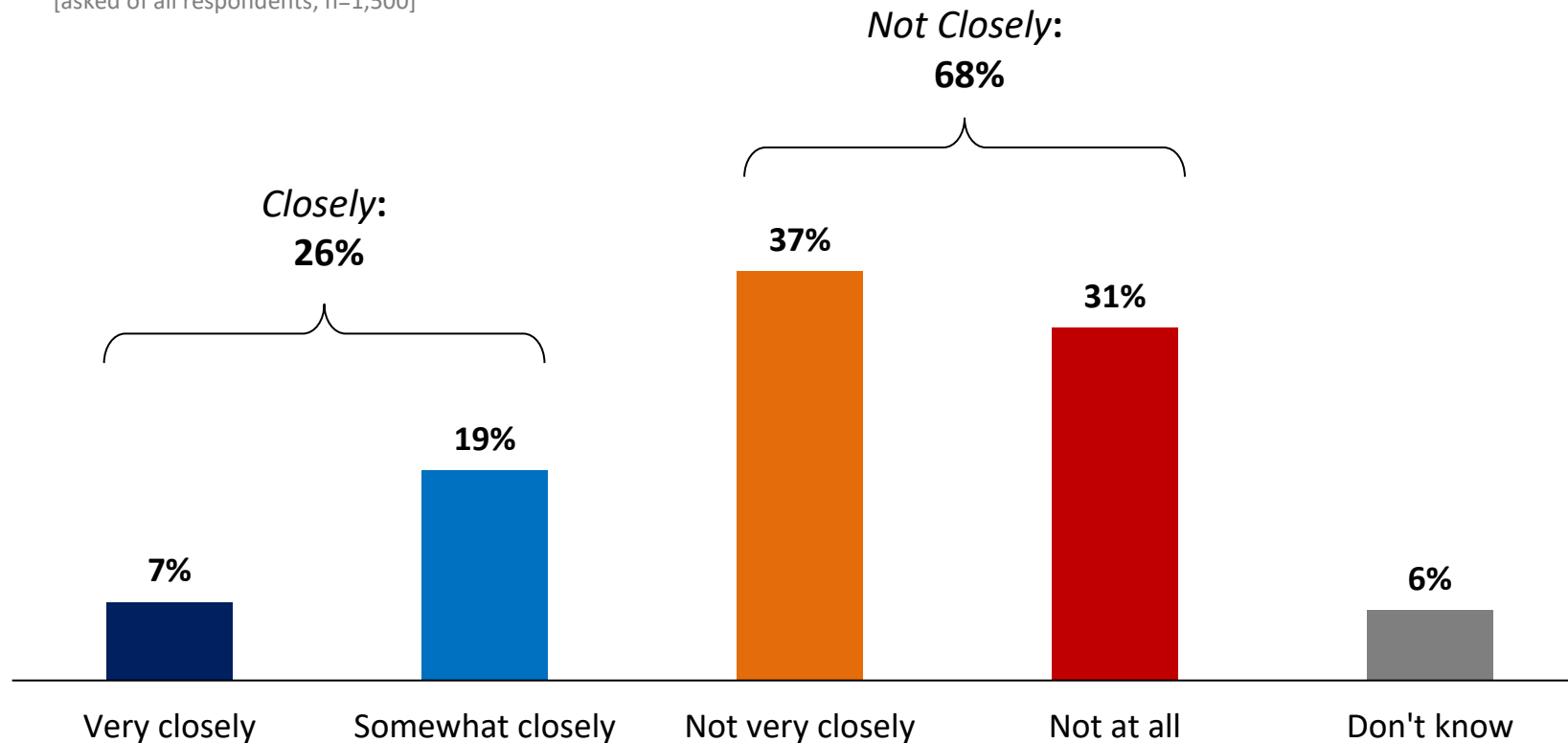
Following Carbon Tax Announcements: Only 26% say they are following²⁷ news about the carbon tax increase closely



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?

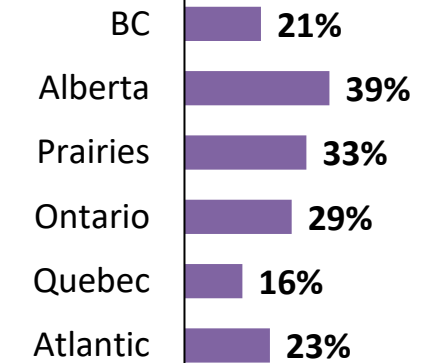
[asked of all respondents; n=1,500]



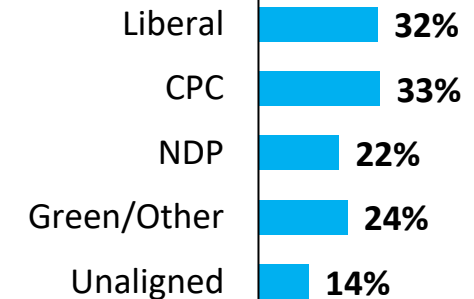
Segmentation

Respondents who say “Closely”

Region

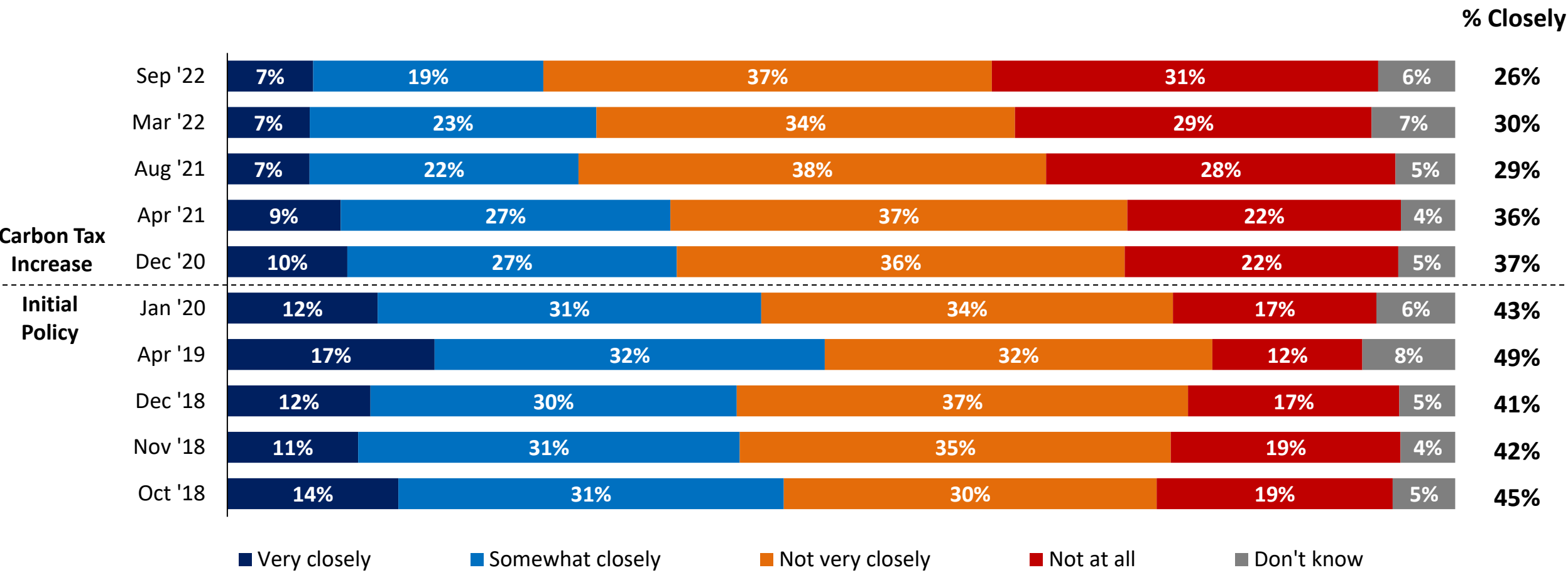


Party ID



Following Carbon Tax Announcements: Attention has continued to fall ²⁸ to its lowest level since the policy was first announced

Q How closely have you been following the news about this announcement?
 [asked of all respondents; n=1,500]



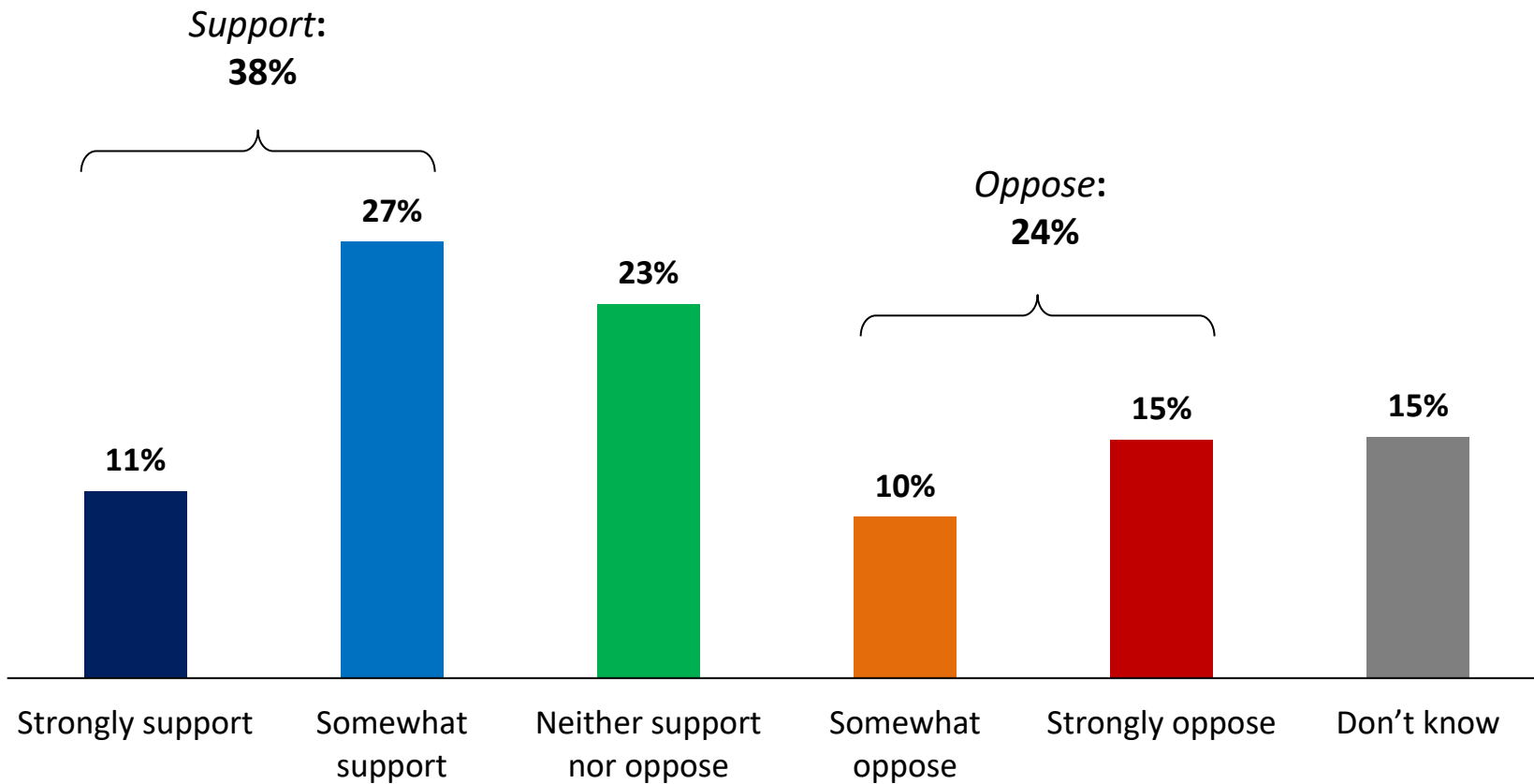
Note: Details of the policy were updated in December 2020 as the government announced an update.

Policy Support: A plurality (38%) support the current carbon tax policy; highest among Liberals and New Democrats



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

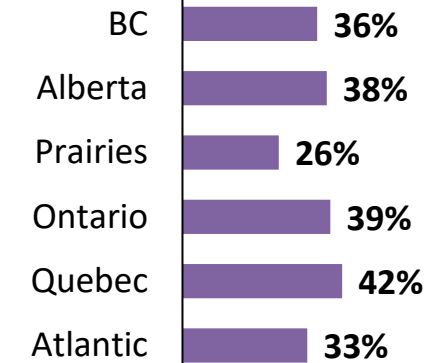
[asked of all respondents; n=1,500]



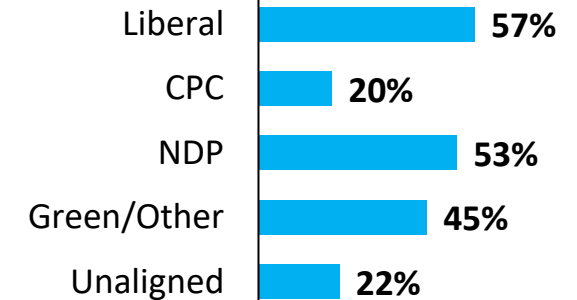
Segmentation

Respondents who say "Support"

Region



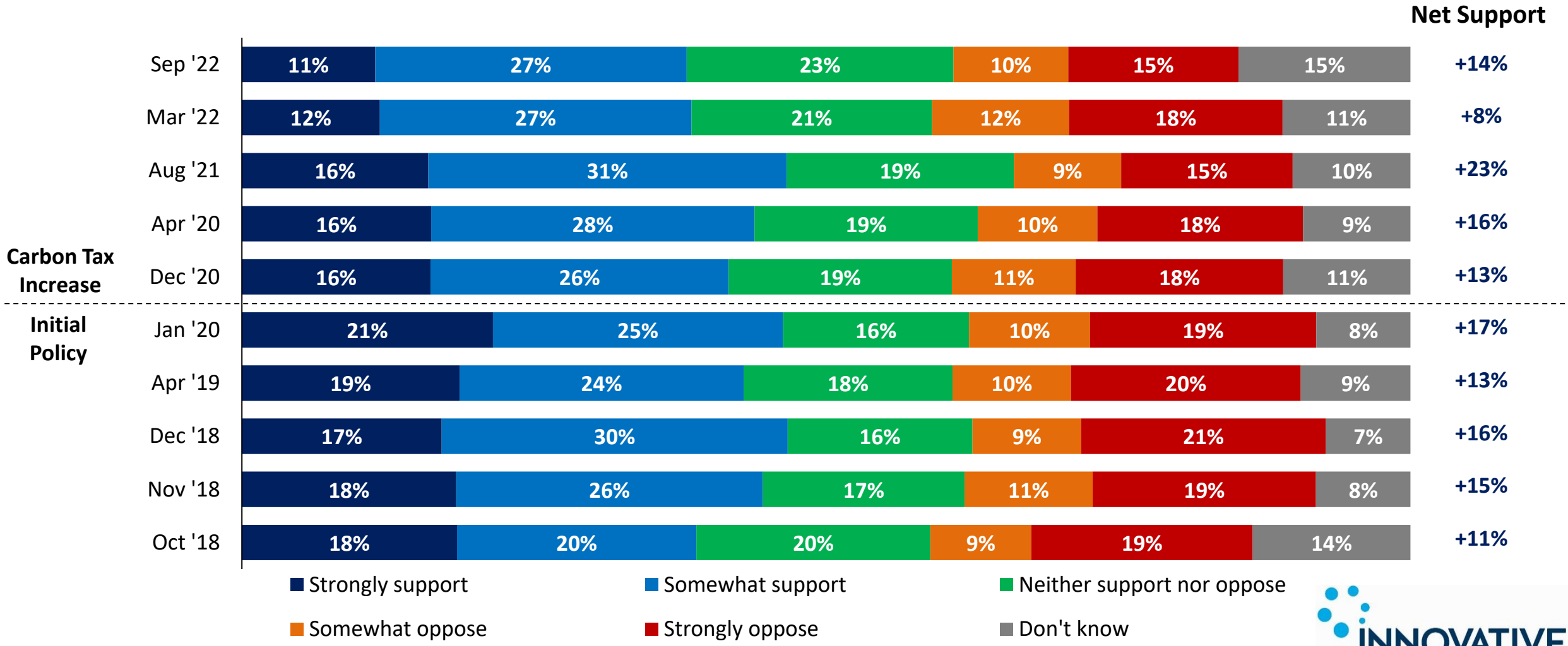
Party ID



Tracking Policy Support: Net support is up now from a low in March to +14%



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=1,500]



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

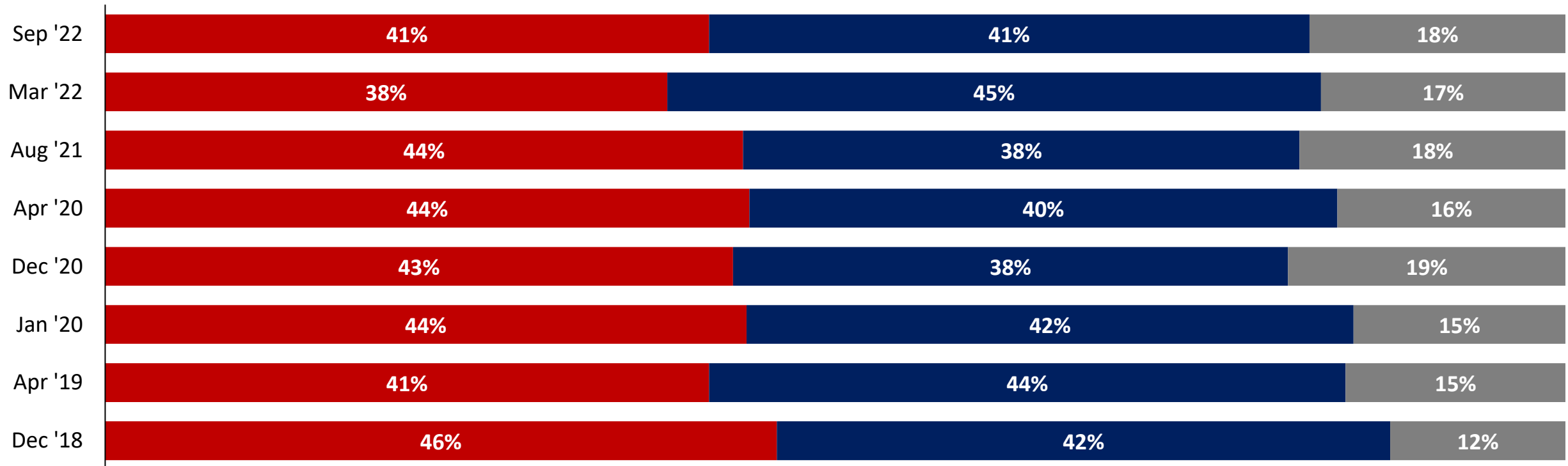


Perception of Carbon Pricing Policy: Canadians are split on whether carbon pricing is a way to fight climate change or just a tax grab



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=1,500]



■ 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

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.

Methodology

These are the results of an online survey conducted between September 8th and 21st, 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=2,037 general population, 18 years or older. The results are weighted to n=1,500 based on Census data from Statistics Canada.

Field Dates: September 8th to 21st, 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	297	14.7%	216	14.5%
Men 35-54	235	11.6%	249	16.8%
Men 55+	357	17.6%	259	17.4%
Women 18-34	505	24.9%	213	14.4%
Women 35-54	293	14.5%	255	17.2%
Women 55+	340	16.8%	293	19.7%
BC	317	15.6%	201	13.4%
Alberta	292	14.3%	171	11.4%
Prairies	140	6.9%	98	6.6%
Ontario	701	34.4%	580	38.6%
Quebec	435	21.4%	347	23.1%
Atlantic	152	7.5%	103	6.8%



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Building Understanding.