

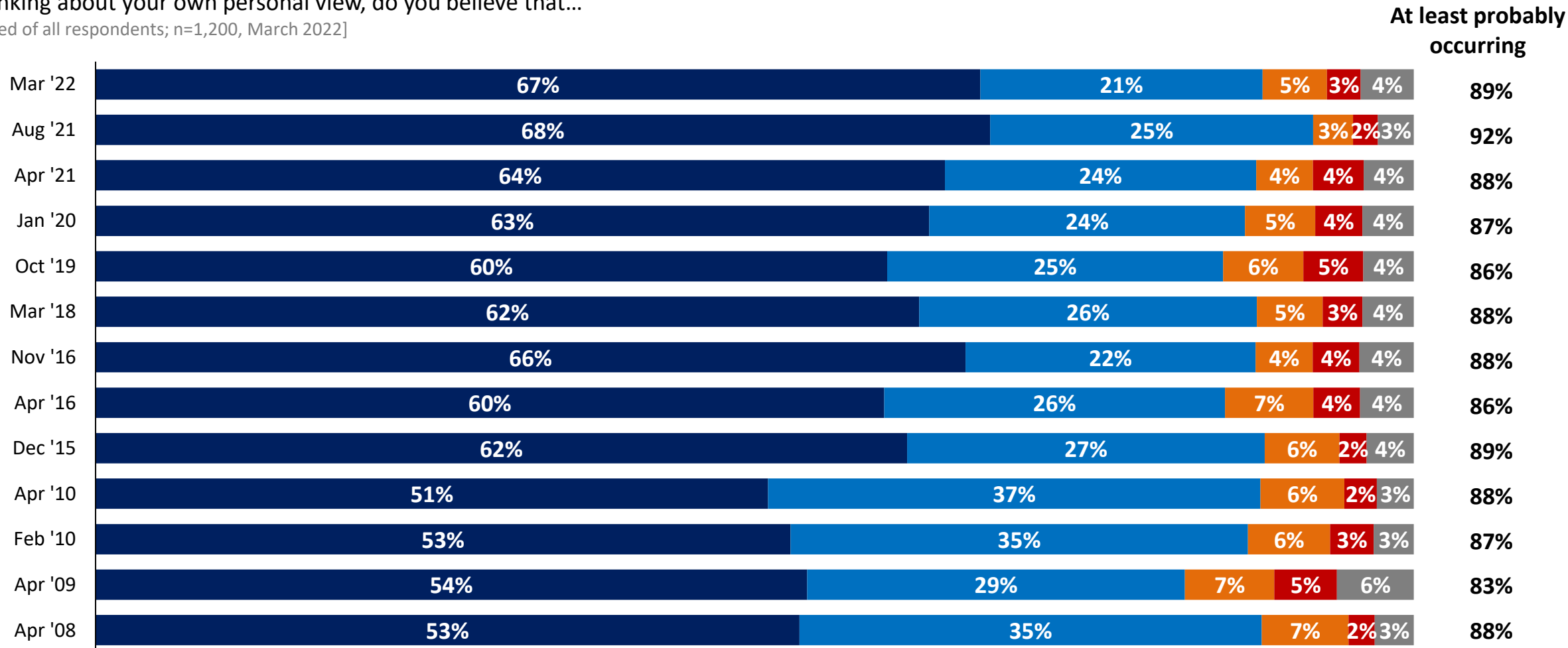


**Will Canadians Support Turning Talk of
Decarbonization into Action?**

**There is a consensus
something should be done**

Belief in Climate Change – what could go wrong

Thinking about your own personal view, do you believe that...
[asked of all respondents; n=1,200, March 2022]



■ 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

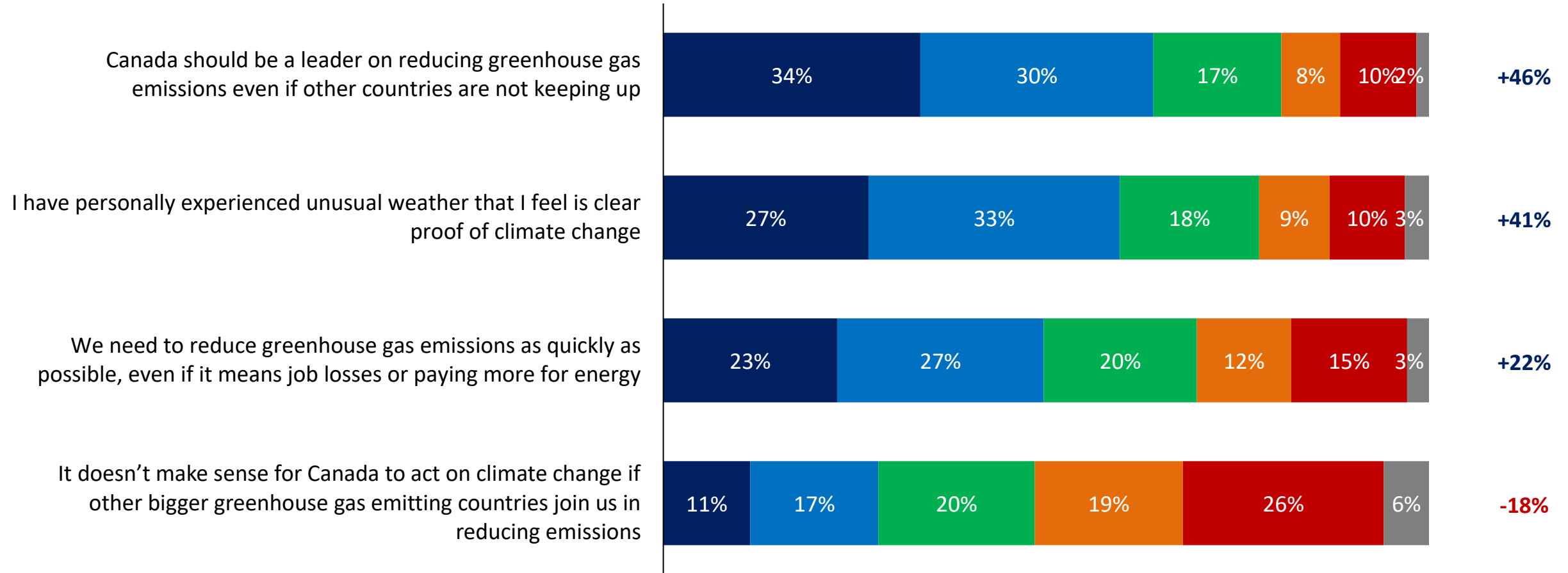
Attitudes: A majority of Canadians agree Canada should be a leader even if other countries are not keeping up



Do you agree or disagree with the following statements?

[asked of all respondents; n=1,200, March 2022]

Net Agree



Strongly agree

Somewhat disagree

Somewhat agree

Strongly disagree

Neither agree nor disagree

Don't know

**There is a lack of awareness
about the solutions**

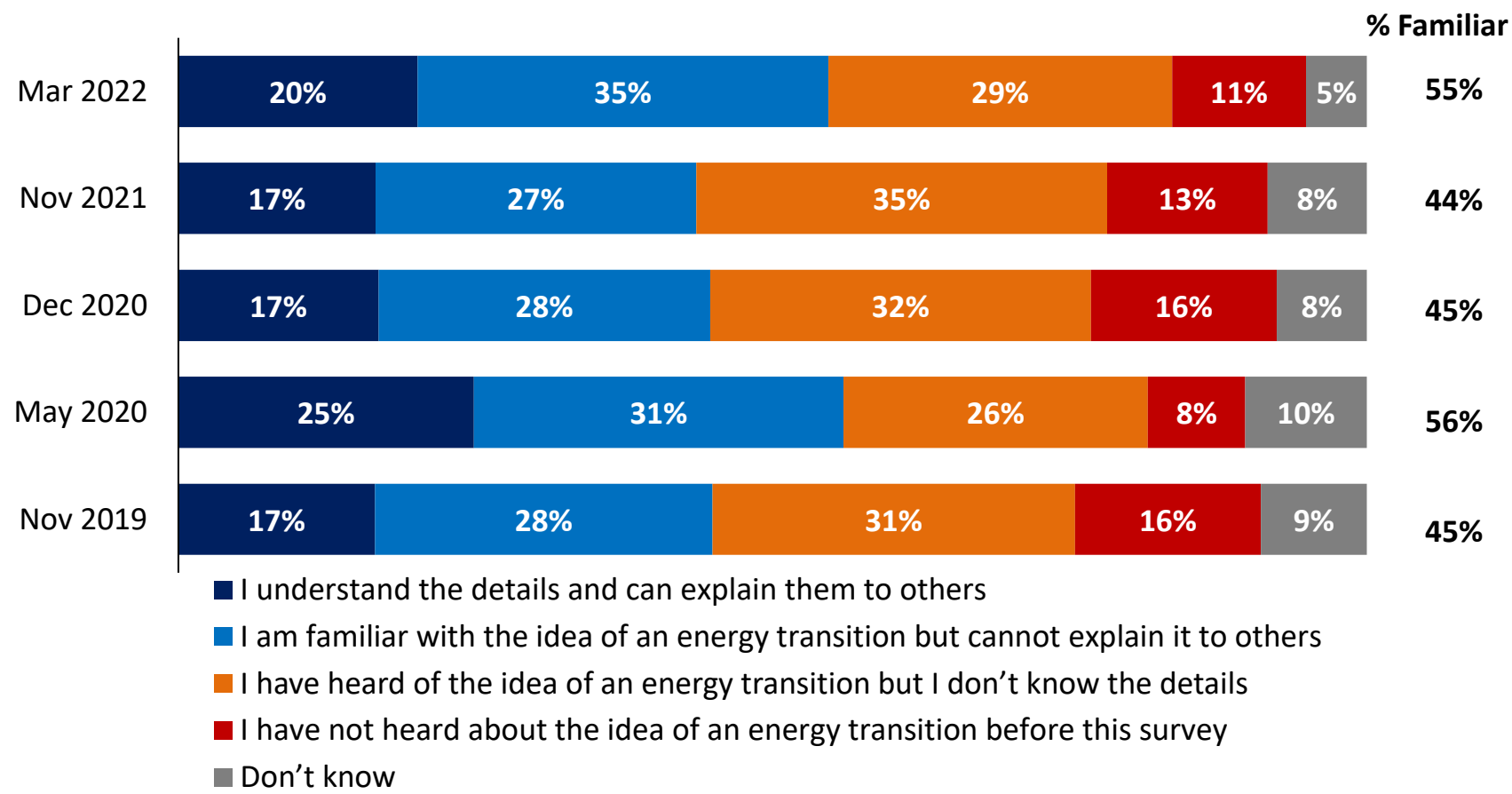
Energy Transition Familiarity: Familiarity has rebounded after dropping in late 2020



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?

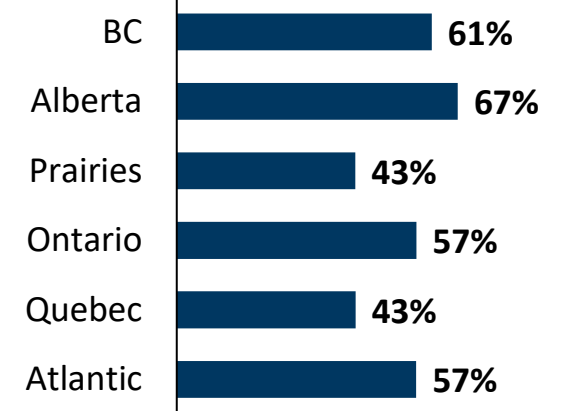
[asked of all respondents n=1,200, March 2022]



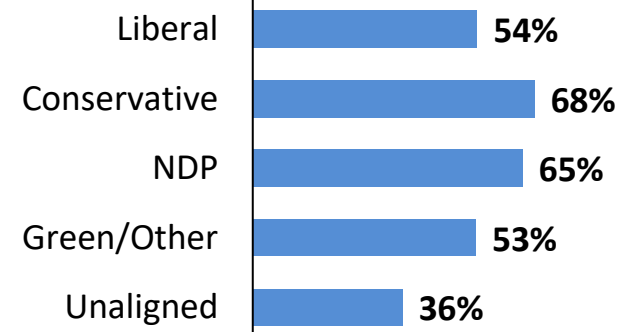
Sample Breakdown (March 2022)

Those who say they "familiar"

Region



Party ID

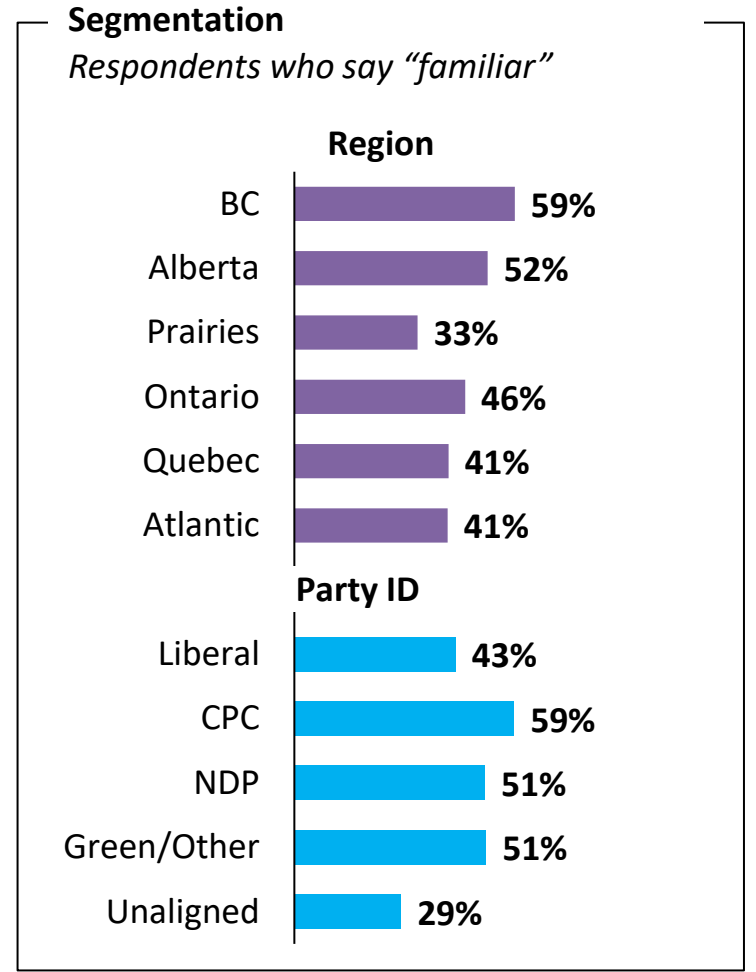
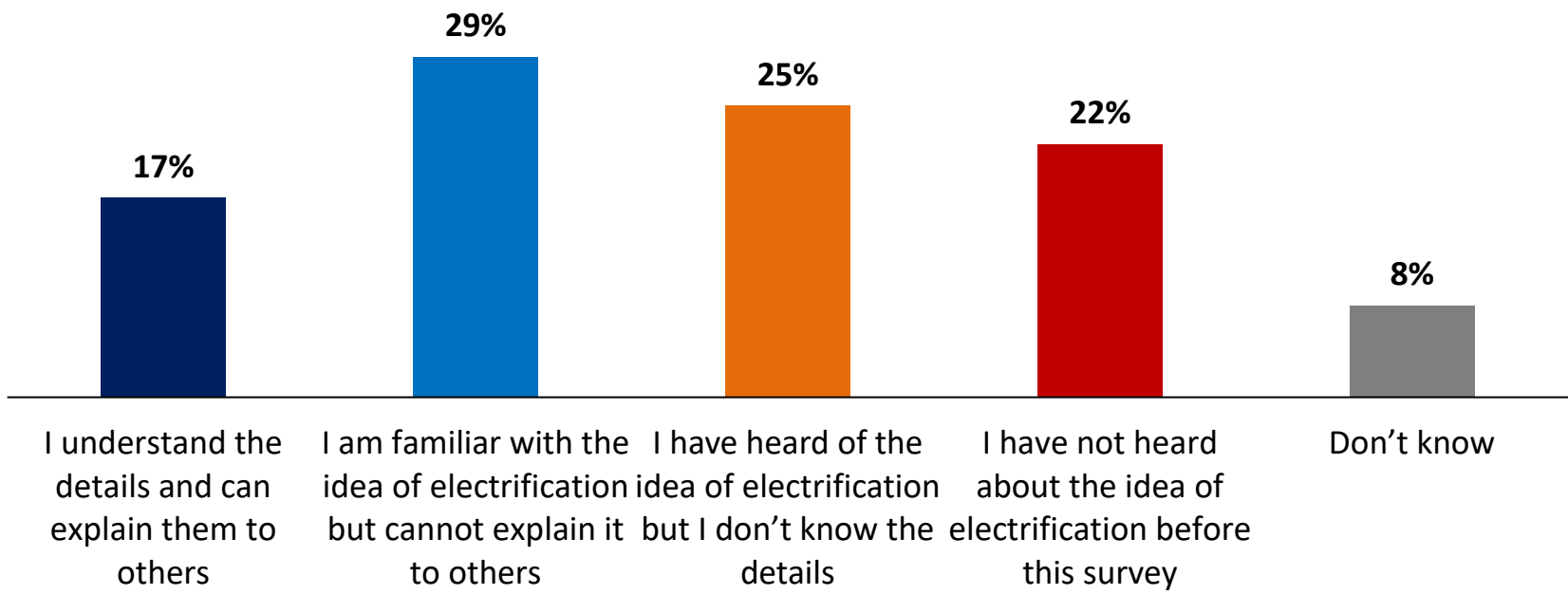


Familiarity: Familiarity with electrification is highest in BC and Alberta, as well as with Conservative partisans



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, March 2022]



Acting like an Energy Consumer? Only 1-in-5 report actively taking steps⁸ to shift energy sources or already have

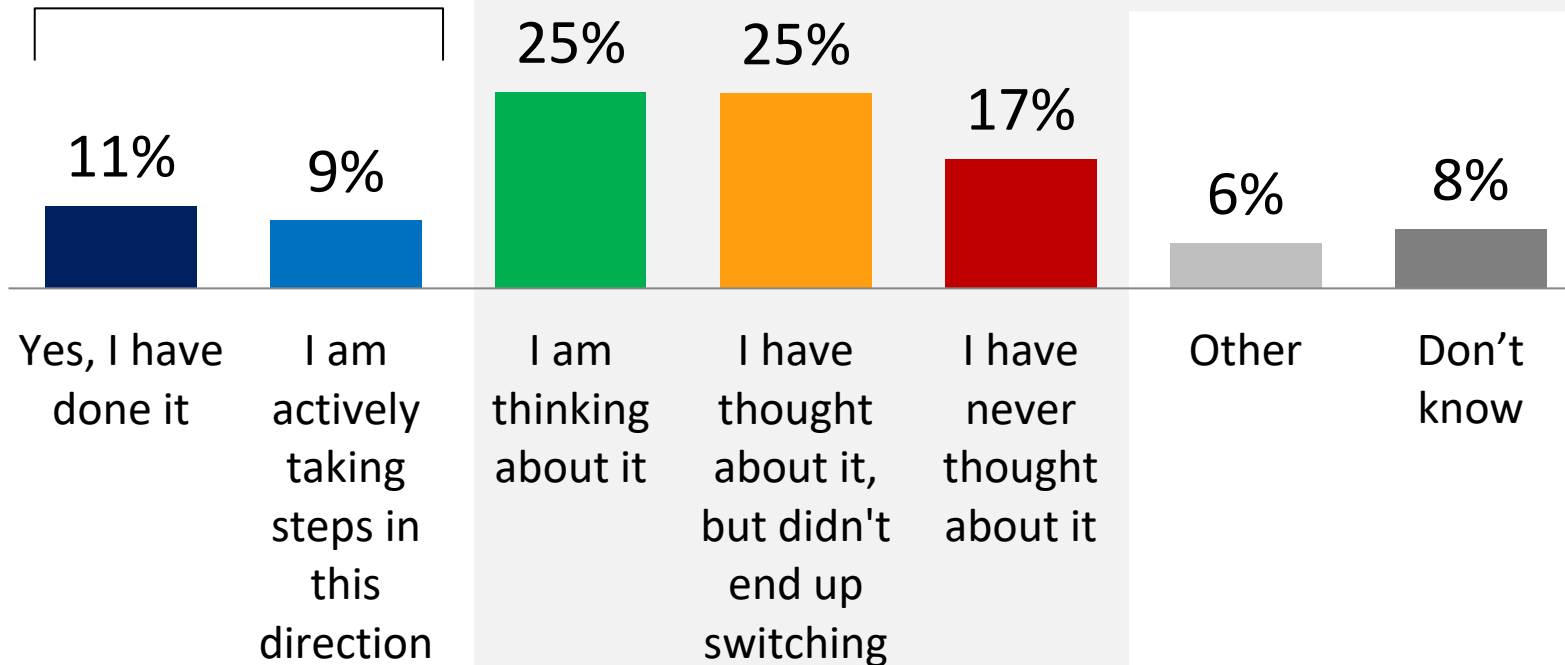


When you think about all your energy bills, have you ever considered shifting from one energy source to another to save money or reduce your impact on the environment? For example, changing from an electric dryer to a gas dryer, or from a gas-fuelled personal vehicle to an electric vehicle.

[asked of all respondents; n=2,000, September 2019]

19%

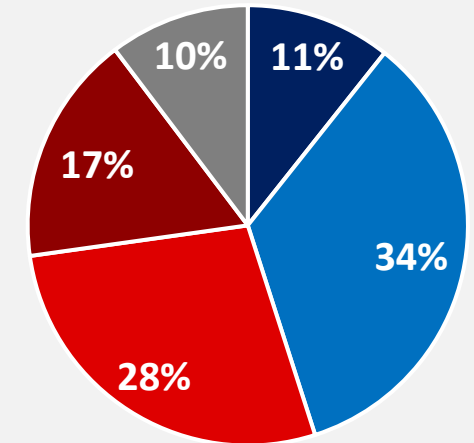
Have at least actively taken steps to switch between energy sources



Among those who **haven't taken steps to switch**:

How likely would you be to consider shifting from one energy source to another in the future?

[n=1,342]



■ Very likely
■ Somewhat likely
■ Not very likely
■ Not likely at all
■ Don't know

Canadians are conflicted

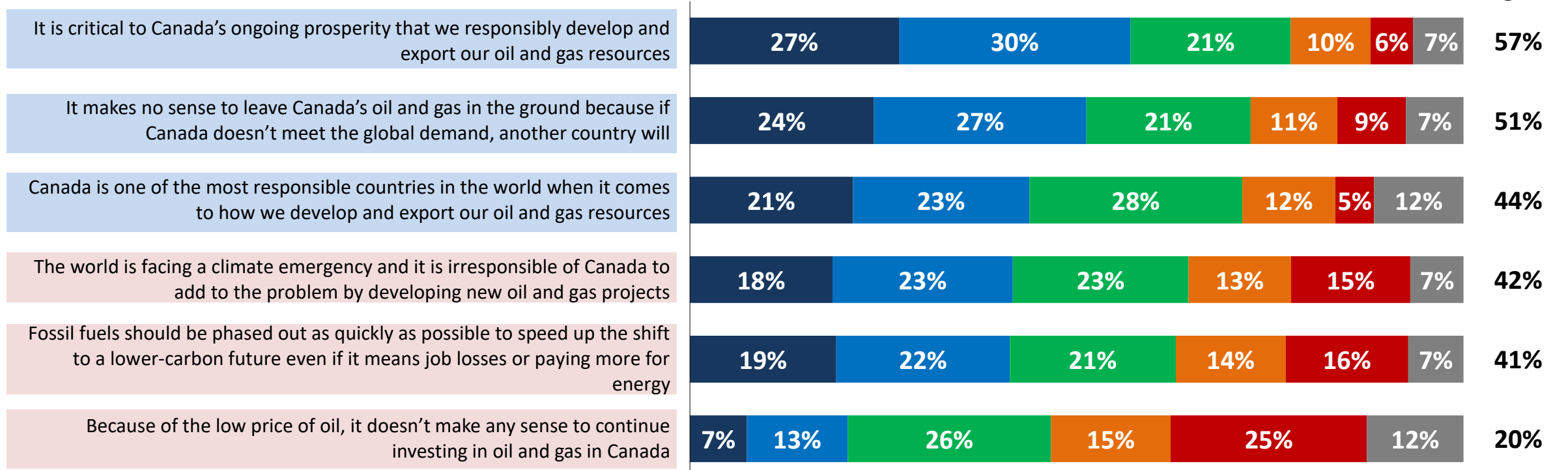
Key Attitudes: A majority agree that developing oil and gas is critical to Canada's ongoing prosperity

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, March 2022]



Pro-oil statements

Pro-transition statements

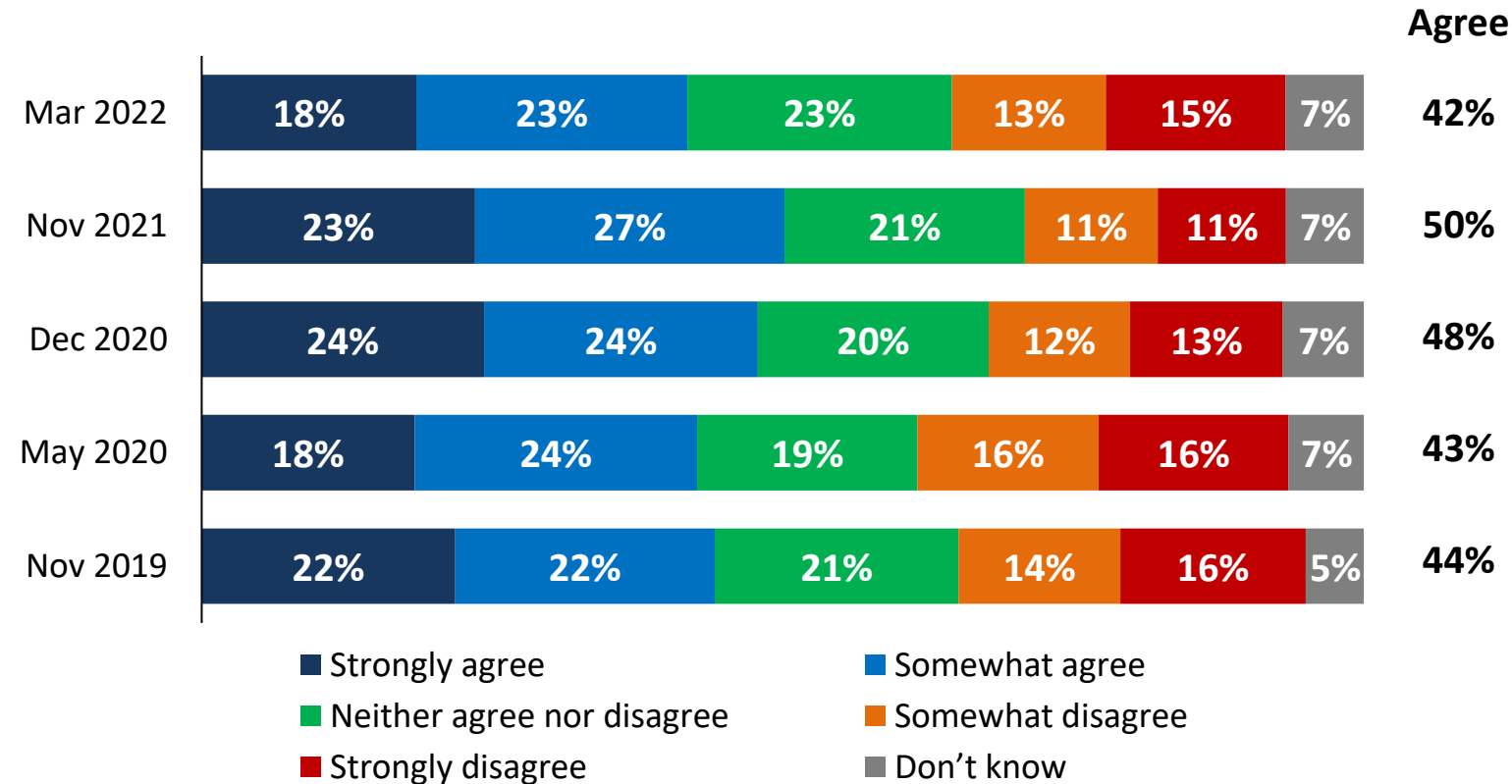
- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree
- Don't know



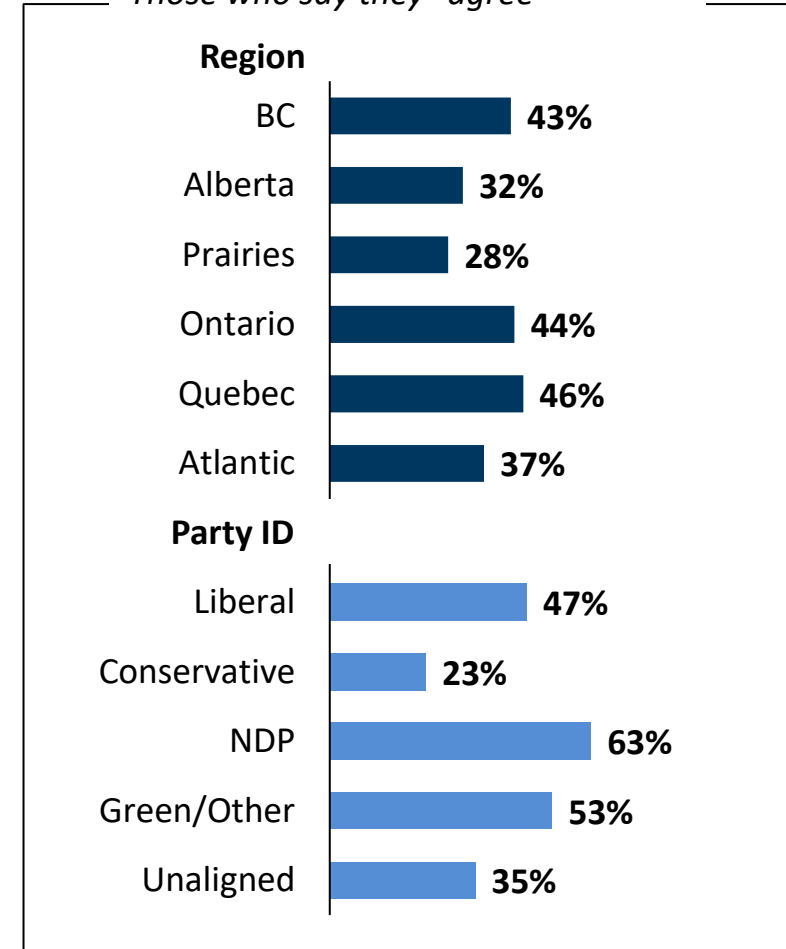
Irresponsible to Develops Oil/Gas: Agreement is down from 50% in November to 42% now; highest among NDP partisans

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 , March 2022]

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 (March 2022)
 Those who say they "agree"



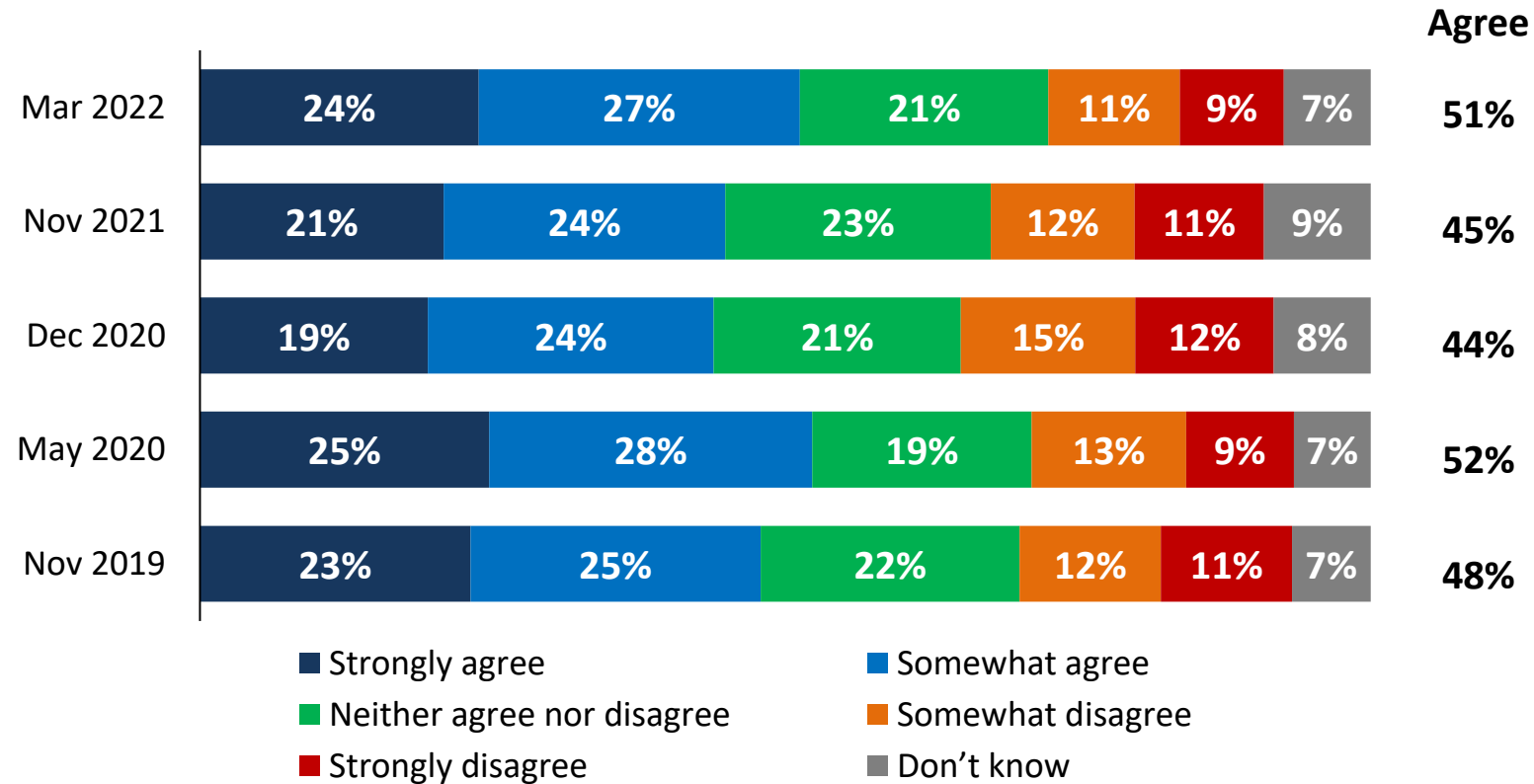
Shouldn't Leave Oil/Gas in the Ground: Agreement that it makes no sense to leave oil in the ground is up to 51%



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

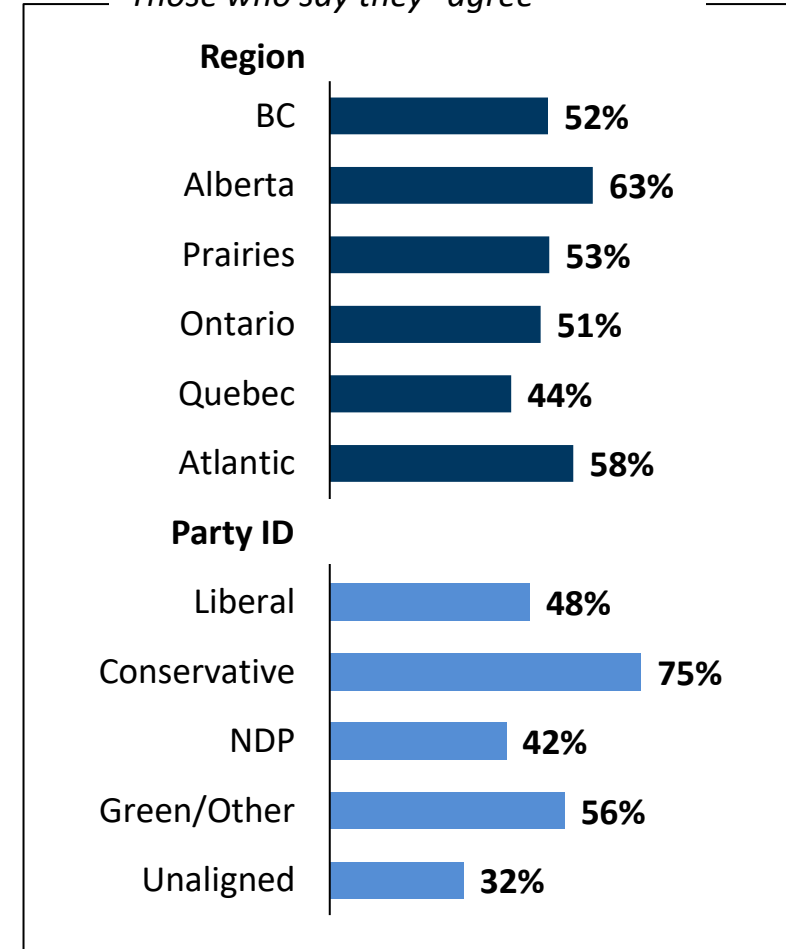
[asked of all respondents n=1,200, March 2022]

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 (March 2022)

Those who say they "agree"

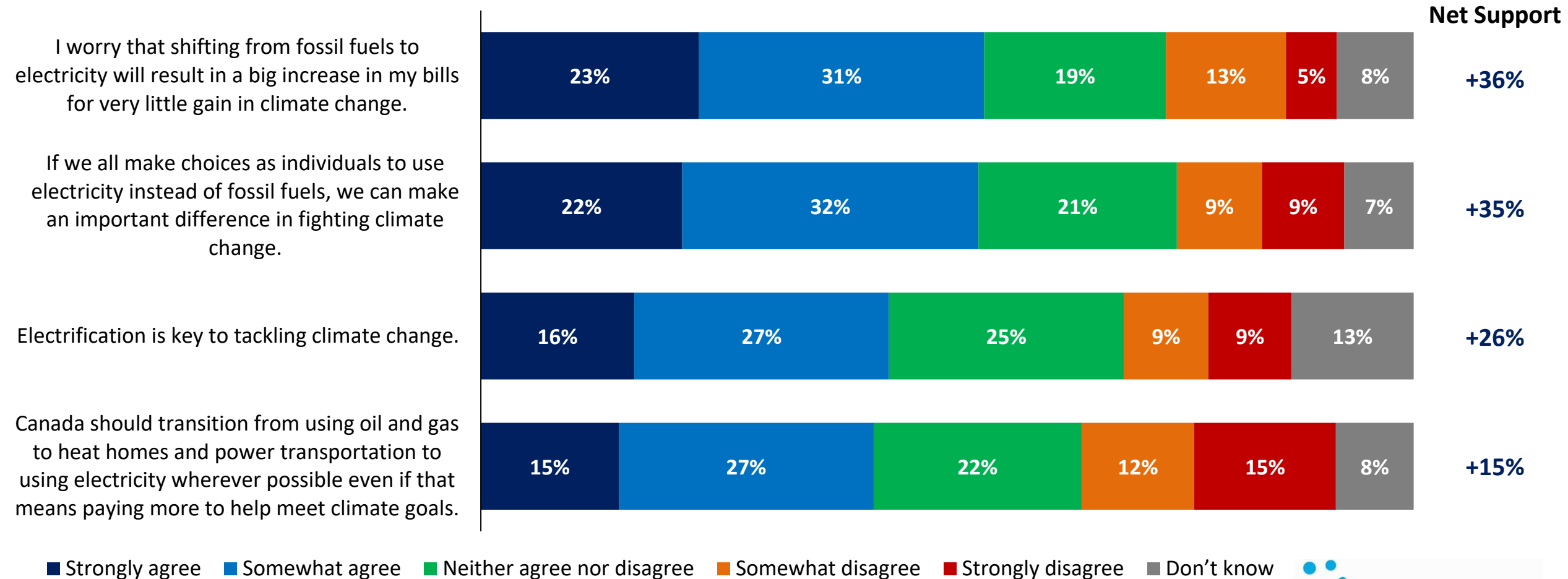


Attitudes: Just over half of Canadians are concerned that shifting to electricity will result in cost increases with little impact on the climate



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, March 2022]



**The policy consensus is
fraying**

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

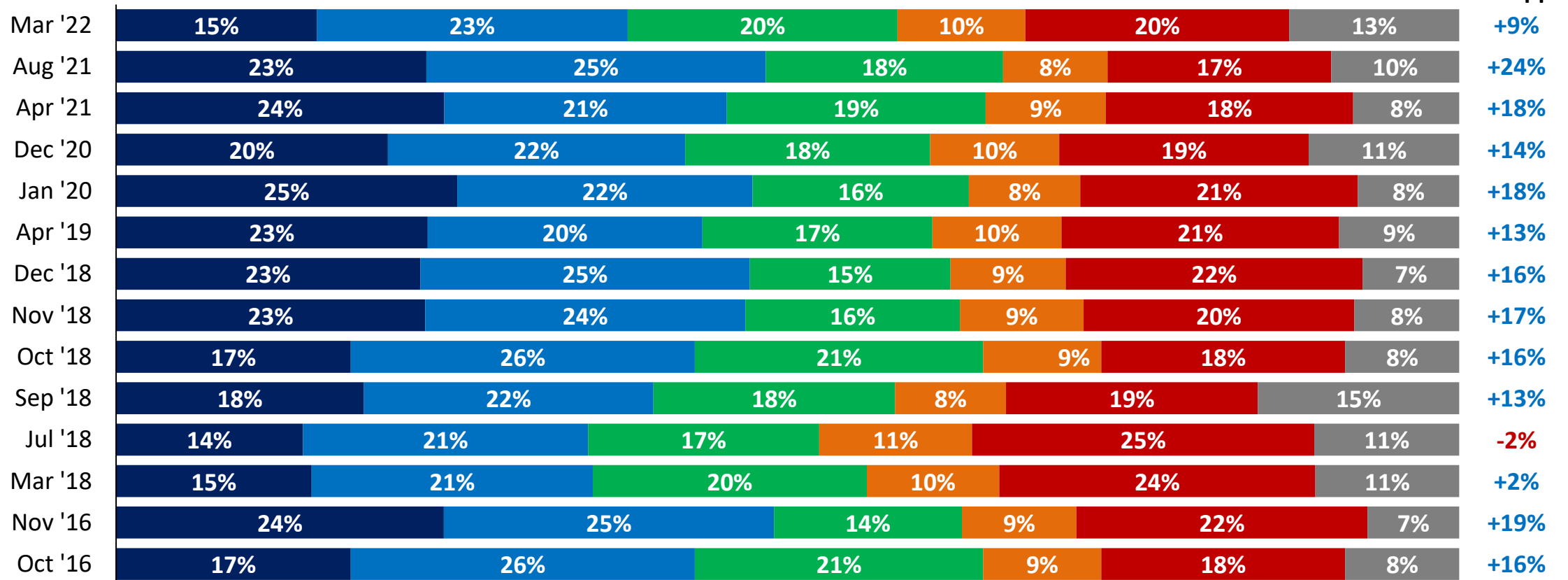


Do you support or oppose the federal government implementing the following policy?

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, March 2022]

Net Support



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



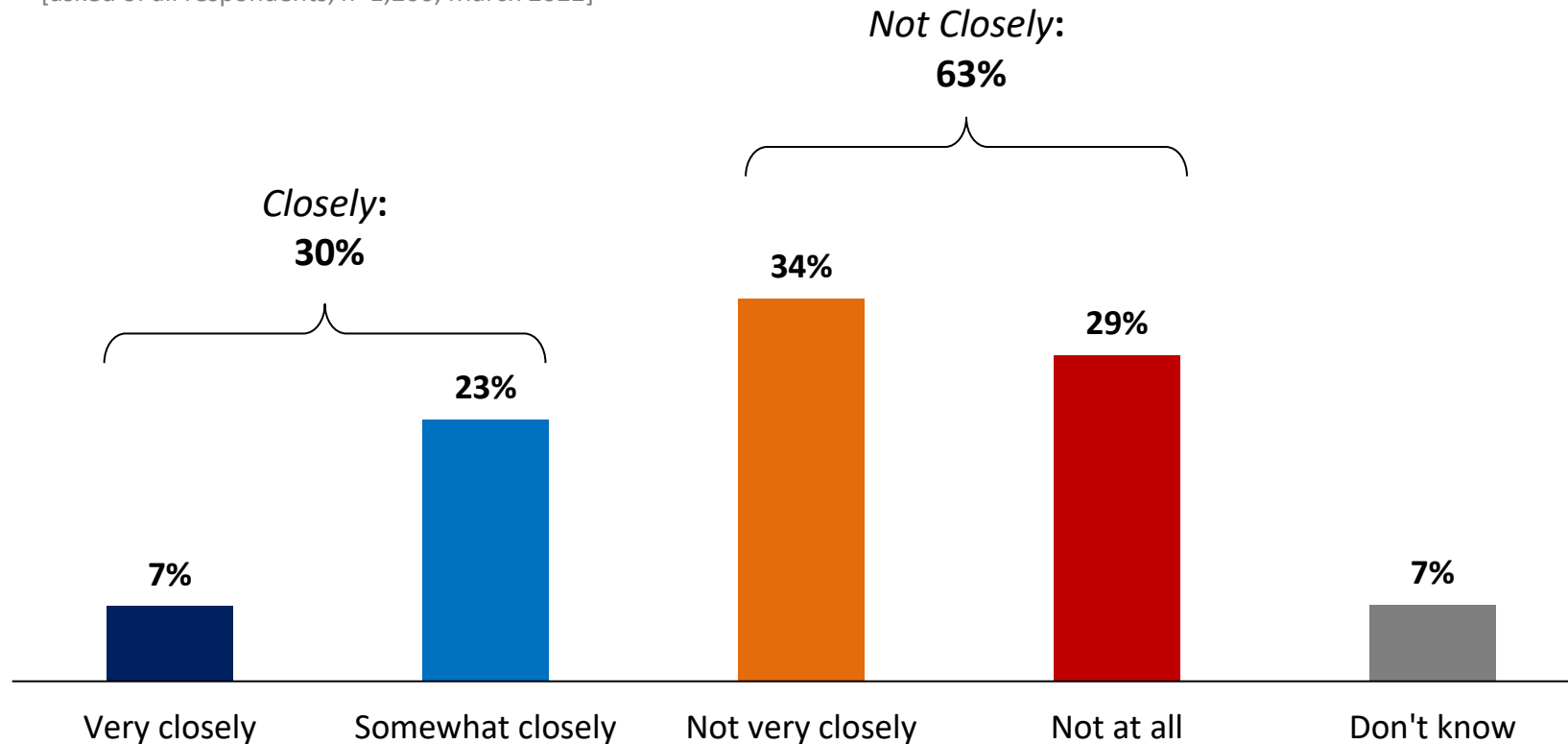
Following Carbon Tax Announcements: Most Canadians are not following news about the carbon tax closely



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?

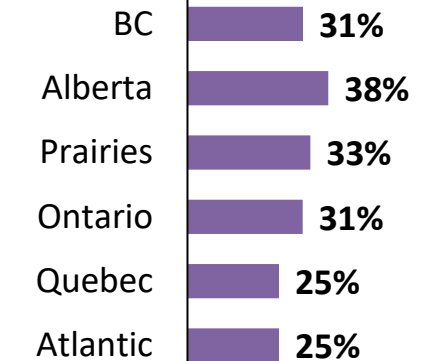
[asked of all respondents; n=1,200, March 2022]



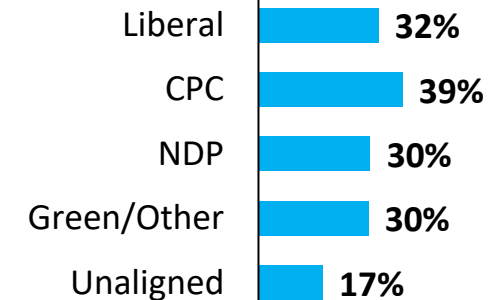
Segmentation

Respondents who say “closely”

Region

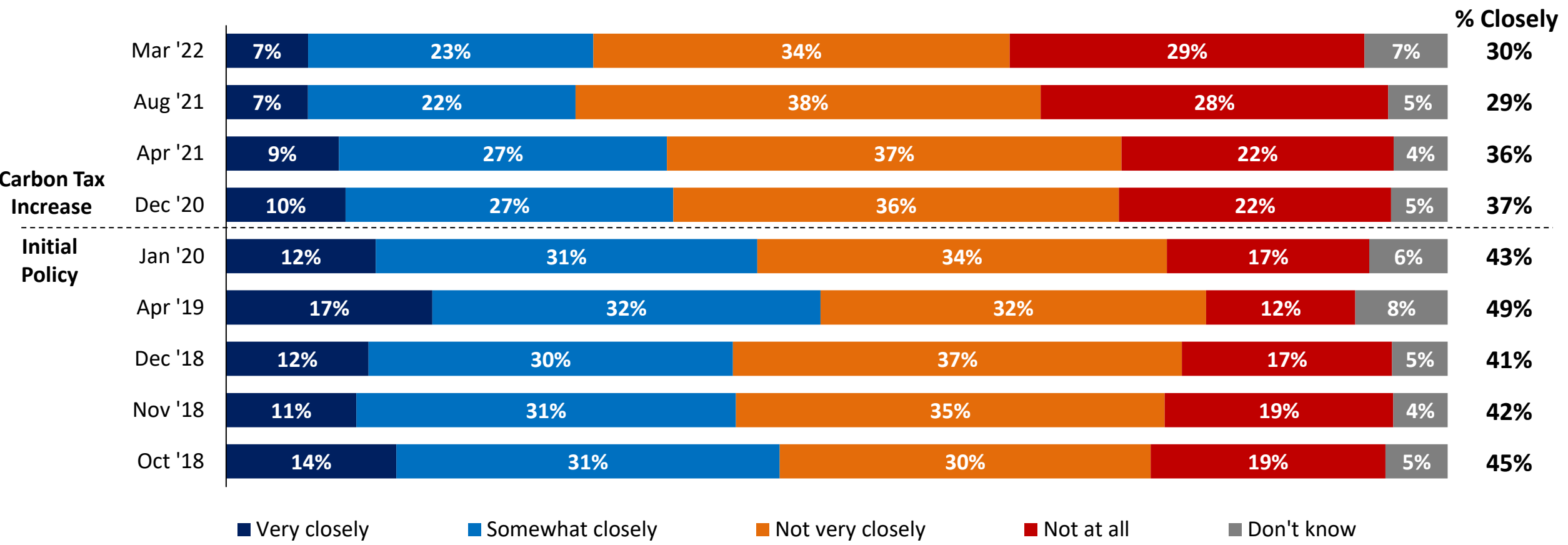


Party ID



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, March 2022]



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

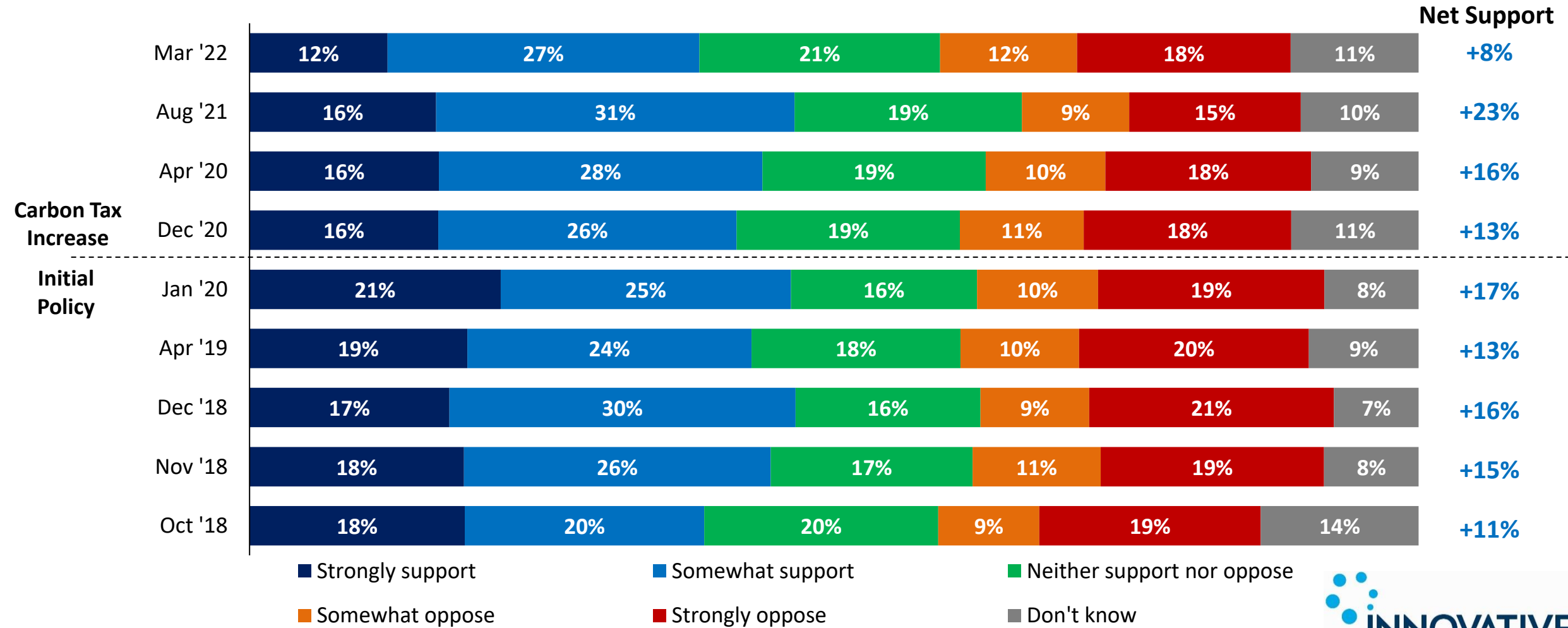


Tracking Policy Support: Support for the existing carbon tax is down from a high in August to 38% with 30% opposed



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, March 2022]



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

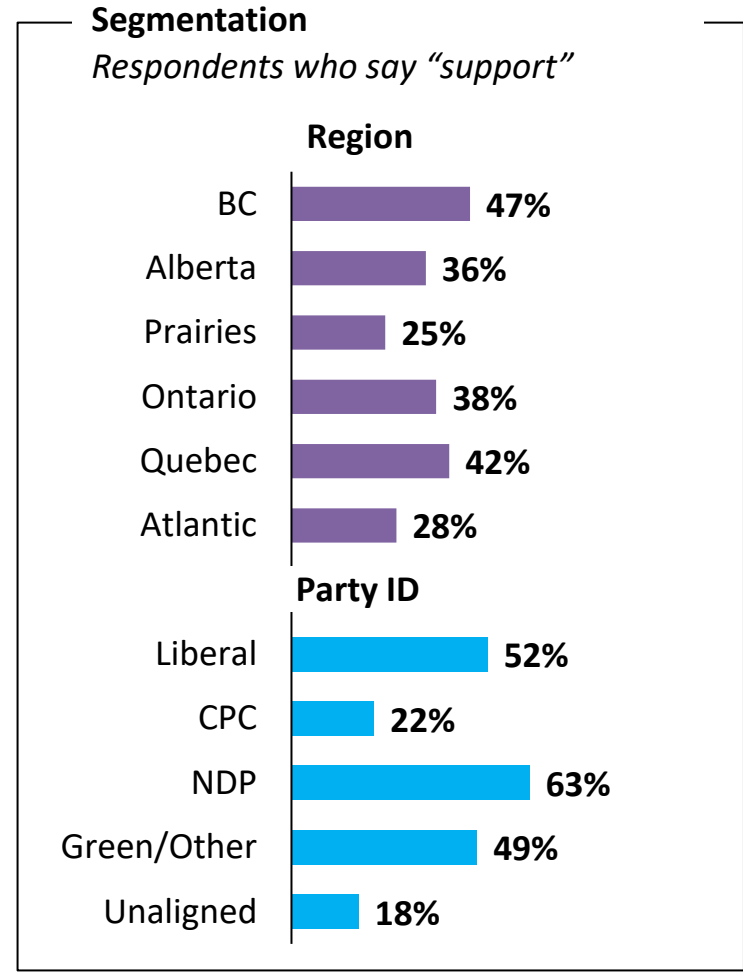
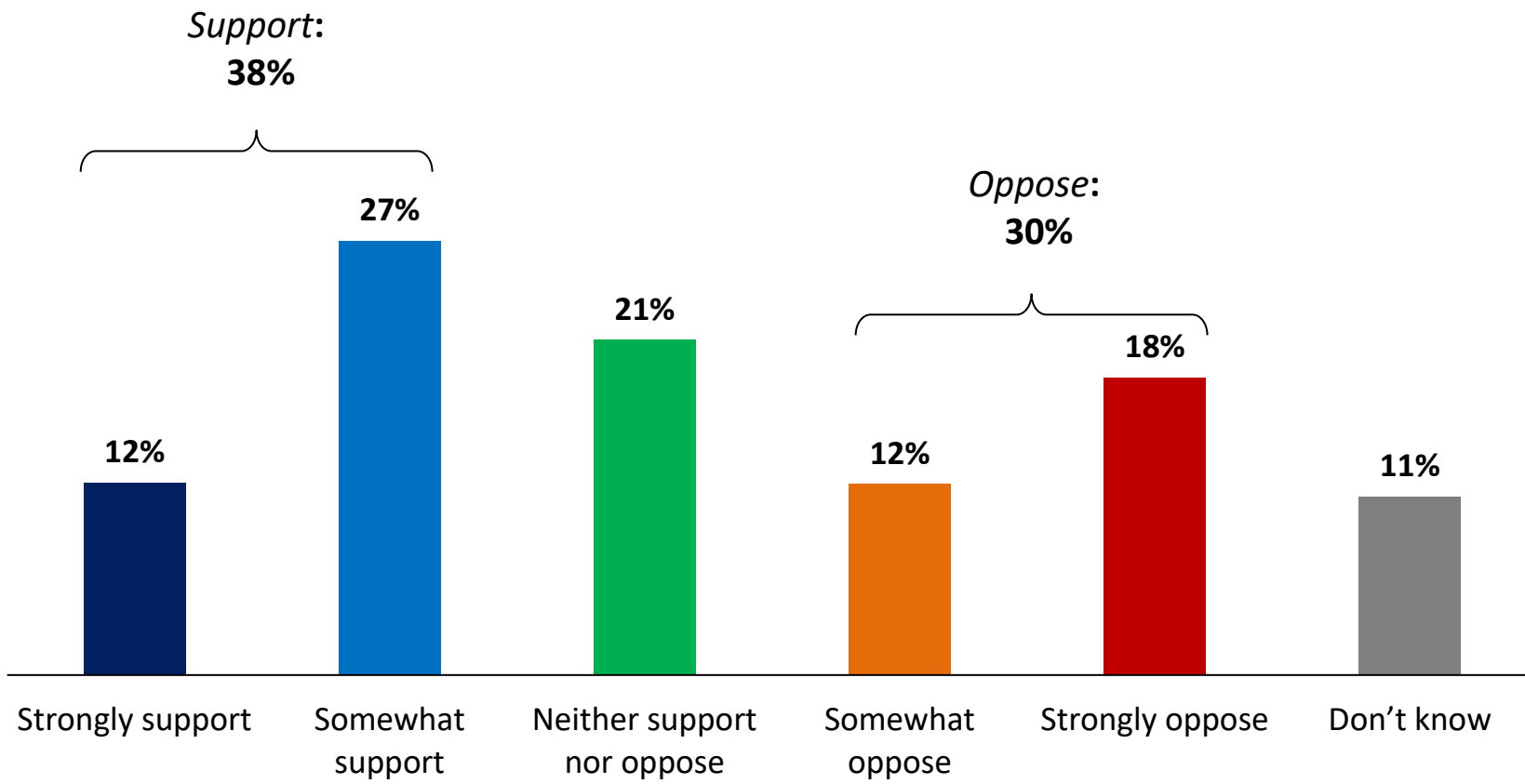


Note: Details of the policy were updated in December 2020 as the government announced an update.

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, March 2022]

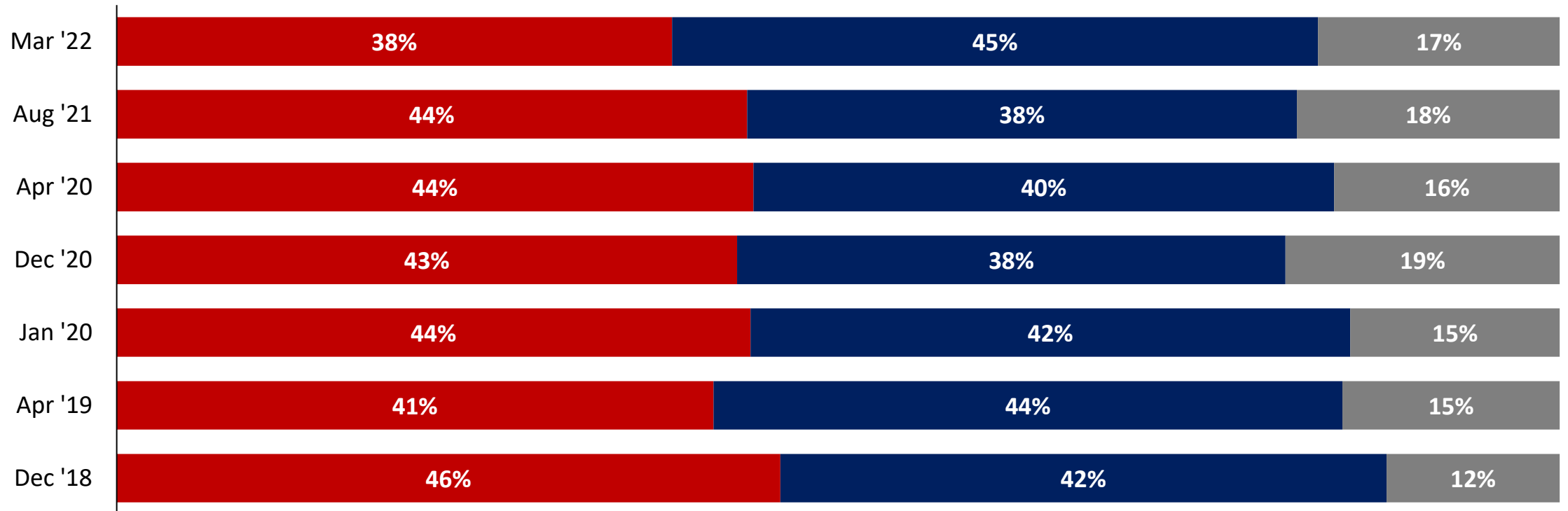


**The political implications
are unclear**

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, March 2022]

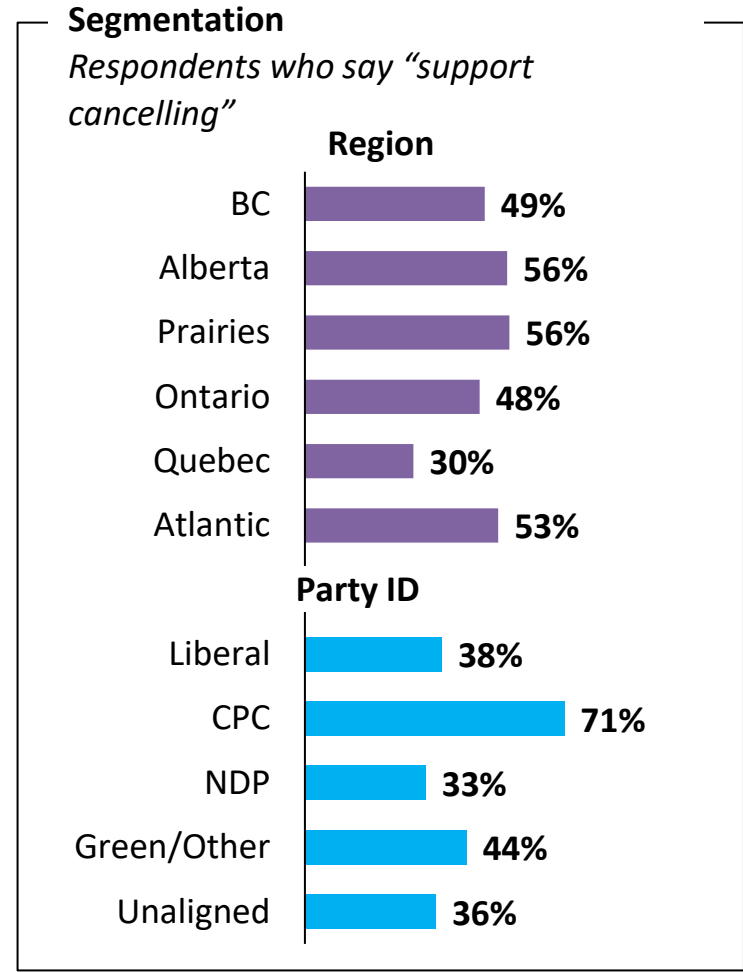
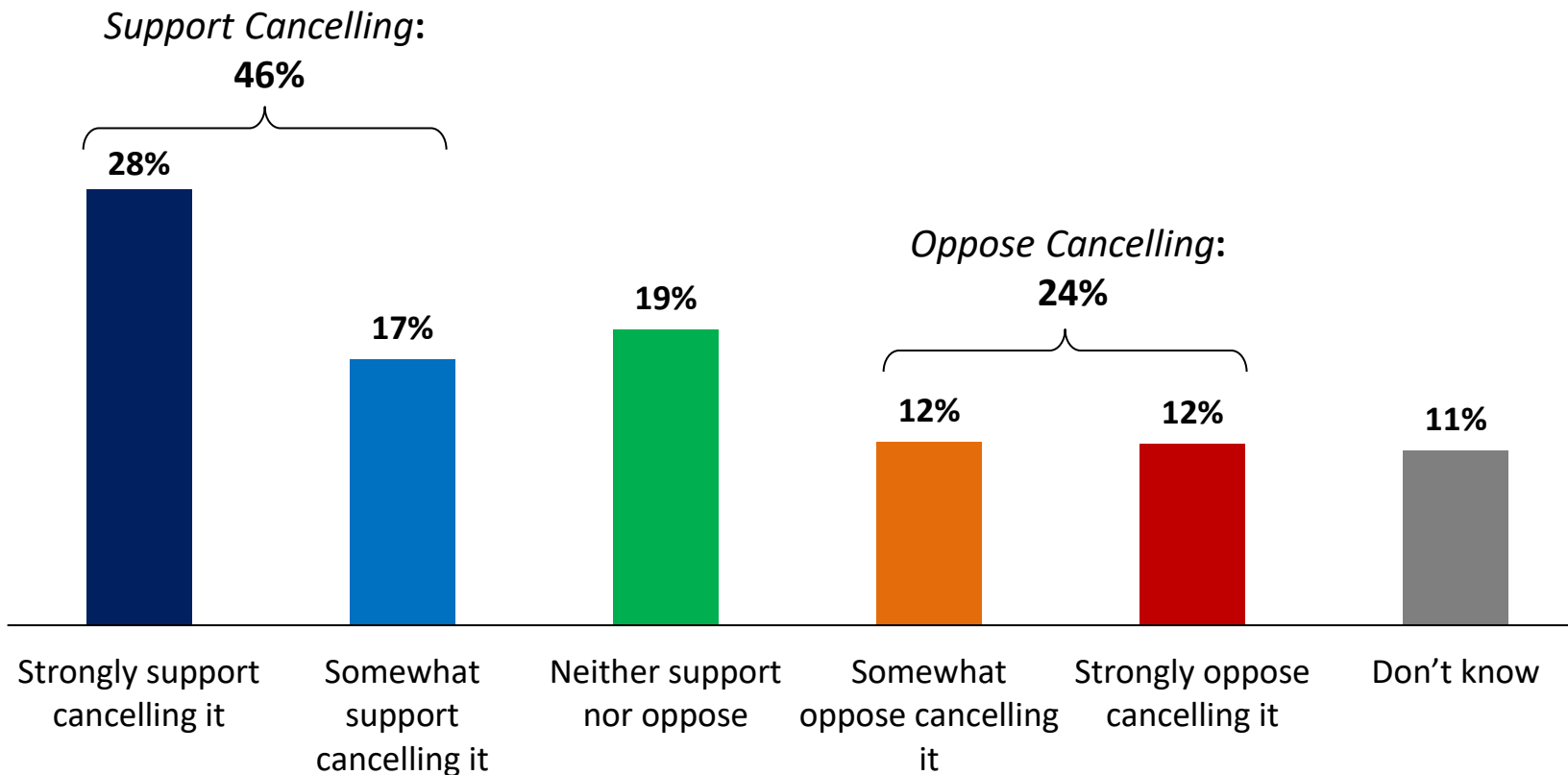


- Putting a price on pollution is one of the best ways to lower carbon consumption and to fight climate change in this country
- The carbon pricing policy is just another tax grab that hinders the economic development of the country and does nothing for the environment
- Don't know

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, March 2022]

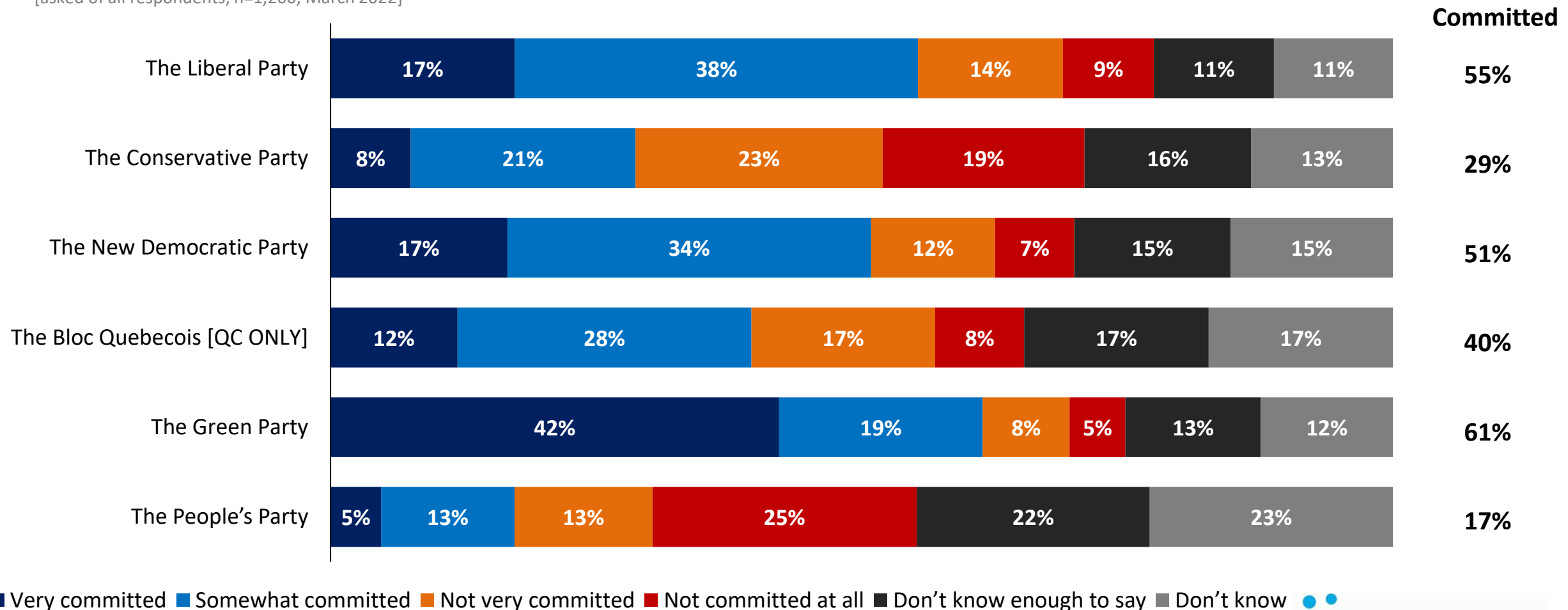


Commitment: The Liberals, NDP, and Green Party are seen as most committed to addressing climate change



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, March 2022]



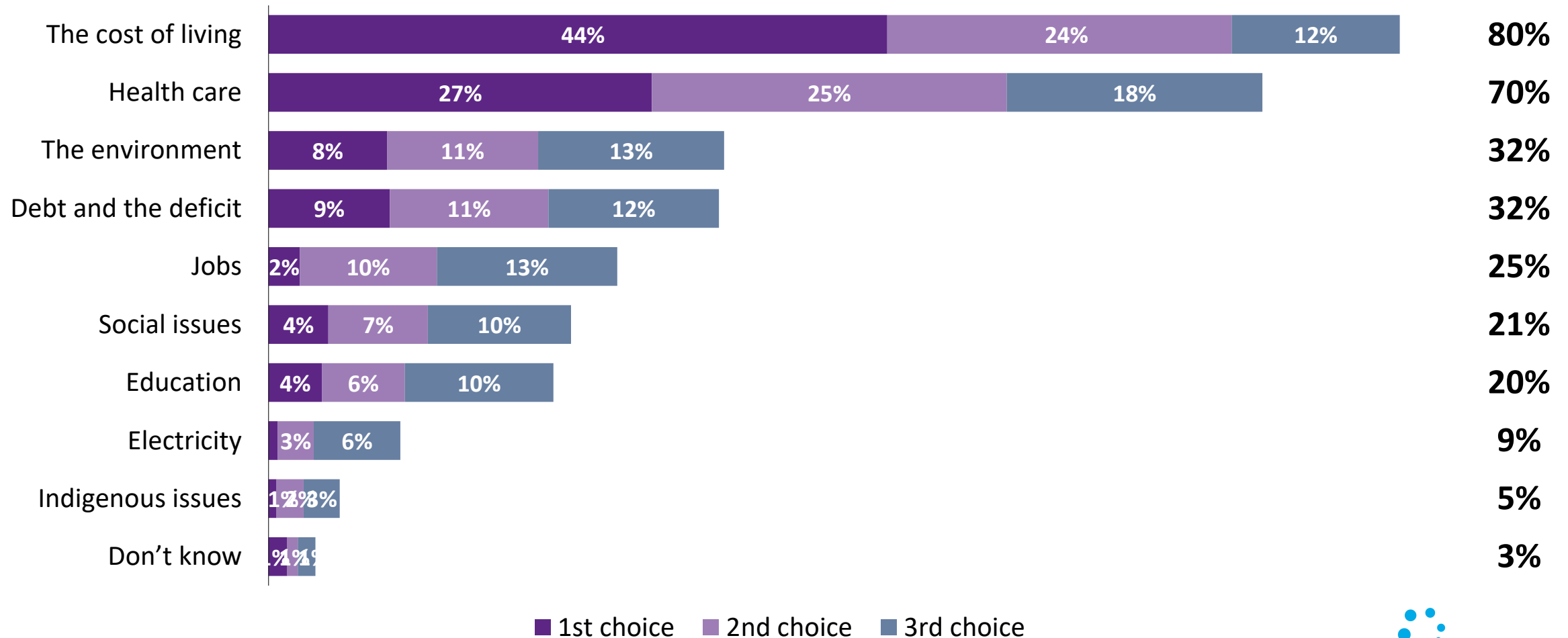
**Recognize and address the
competition for resources**

Issue Matrix: Cost of living dominant as the first-choice issue (44%), followed by health care (27%)

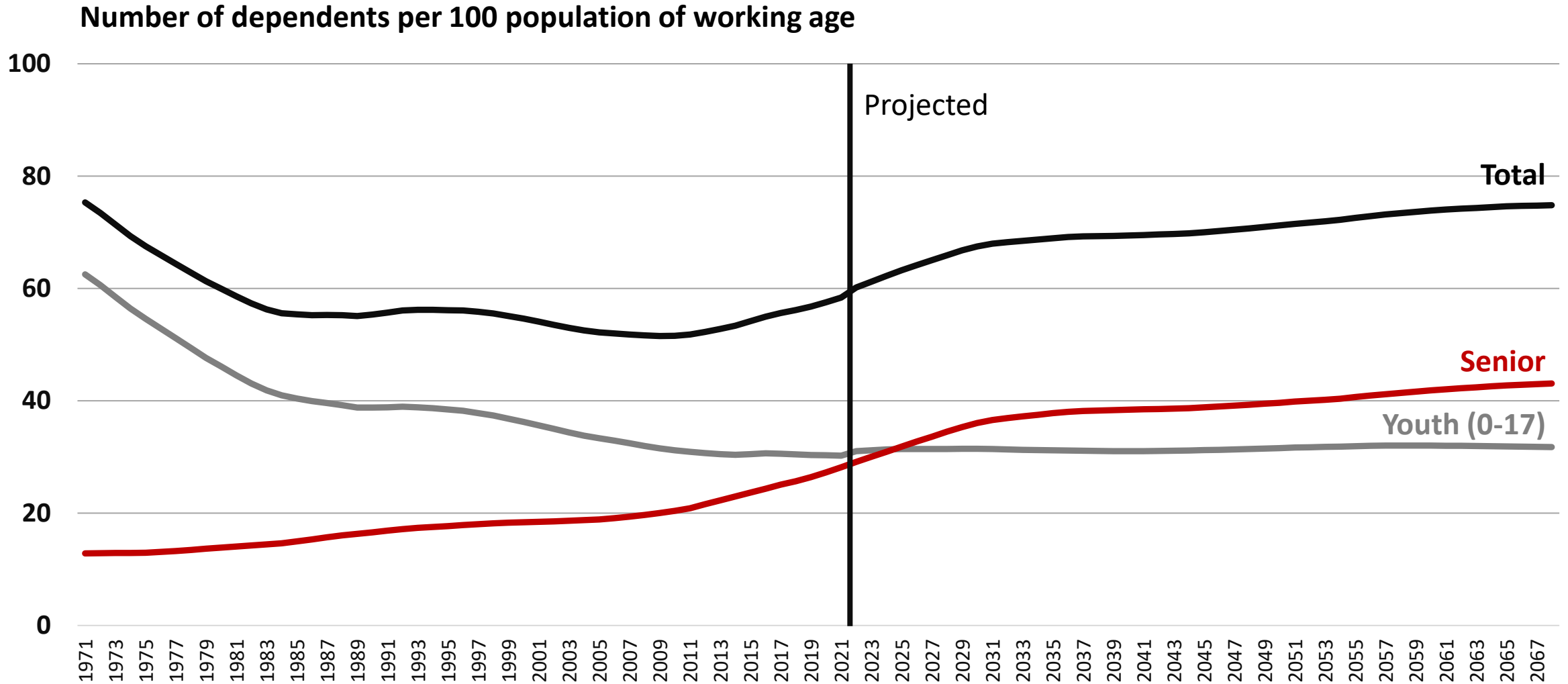


Which of the following issues is the most important issue to you? And which of these issues in the next most important to you? And which of these issues in the next most important to you?

[asked of all respondents; Ontario Post-Election Study n=1,200, June 2022]



Dependency Curve



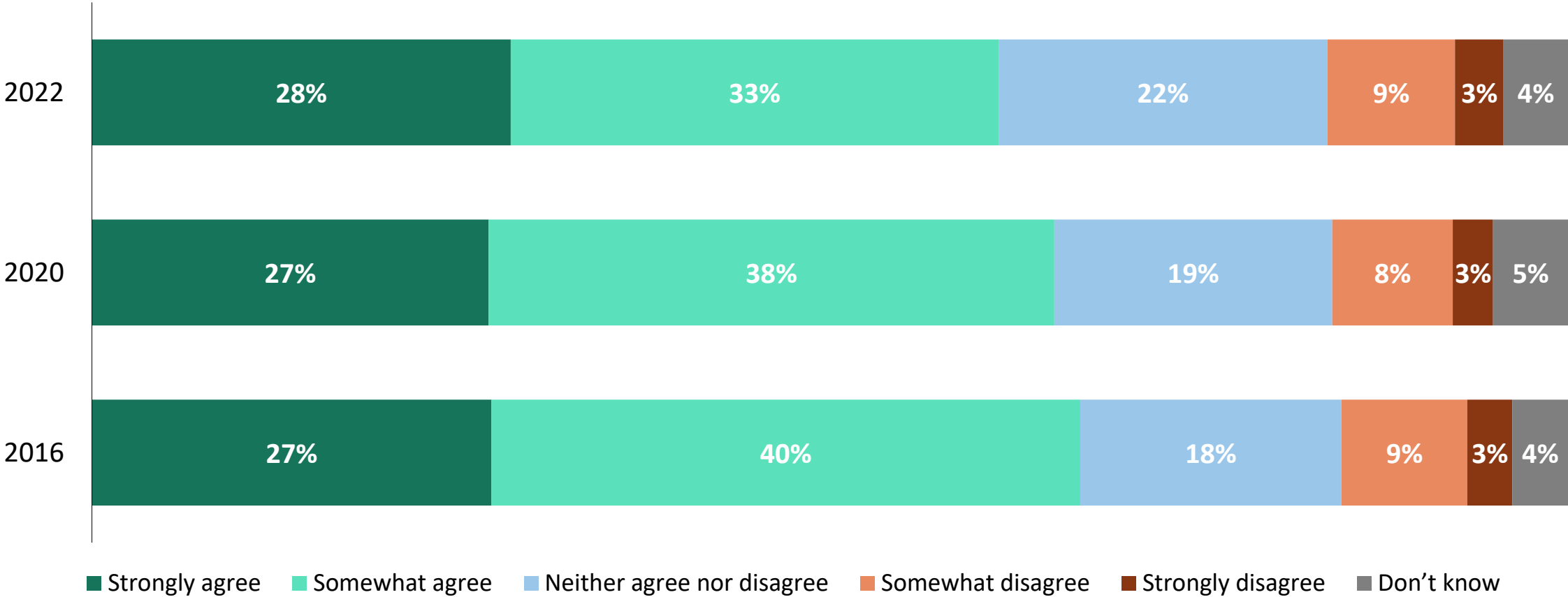
Note: Projected population is drawn from the M3 Medium Growth scenario. Table: 17-10-0057-01

**Watch out for the issue of
control**

Political Alienation: The overall share of Canadians who feel alienated is down, but intensity remains the same



Do you agree or disagree with the following statements? ***Governments care more about special interests than they do about the average person.***
[asked of all respondents; n=1,000, February 2022]

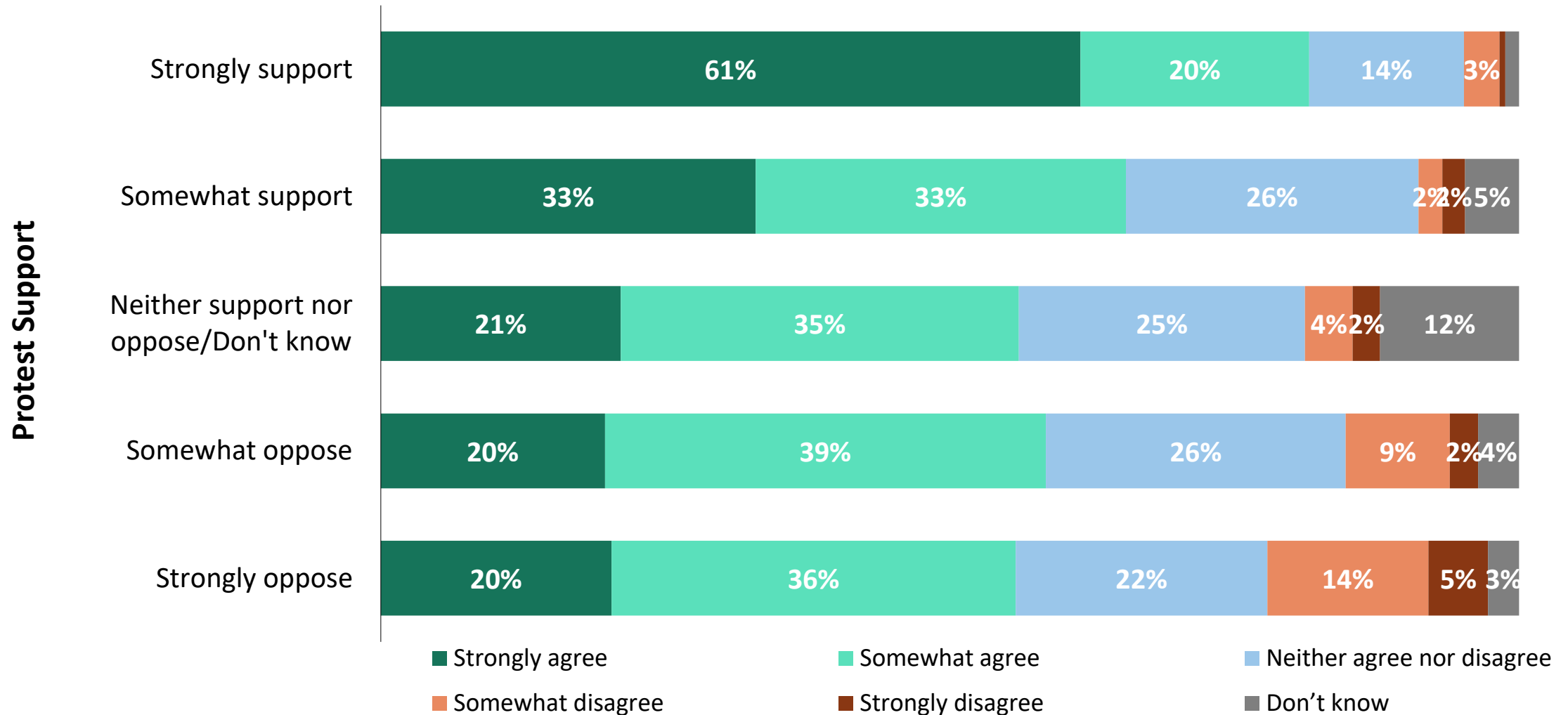


Political Alienation: Protest supporters are far more likely to strongly agree that governments only care about special interests



Do you agree or disagree with the following statements? *Governments care more about special interests than they do about the average person.*

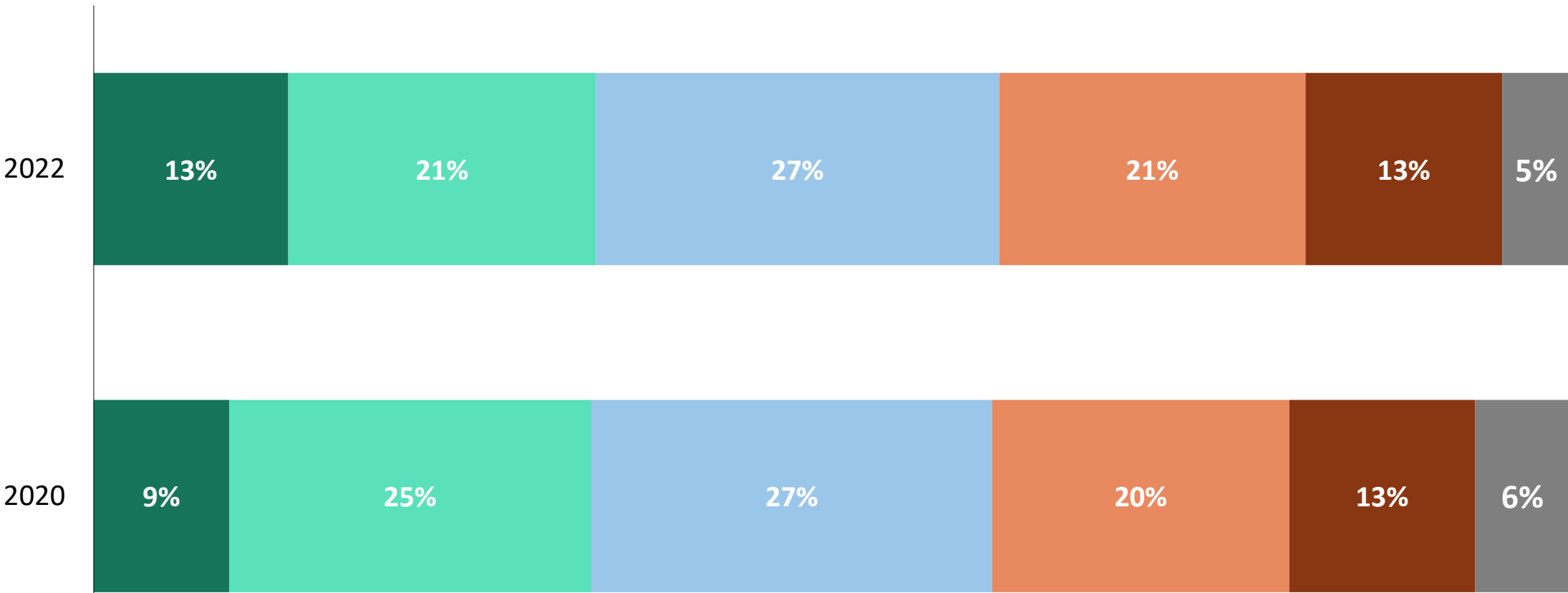
[asked of all respondents; n=1,000, February 2022]



Role of Govt: Canadians remain split on whether or not things would run well without government



Do you agree or disagree with the following statements? **Most things would run pretty well by themselves if the government just didn't interfere**
[asked of all respondents; n=1,000 , February 2022]



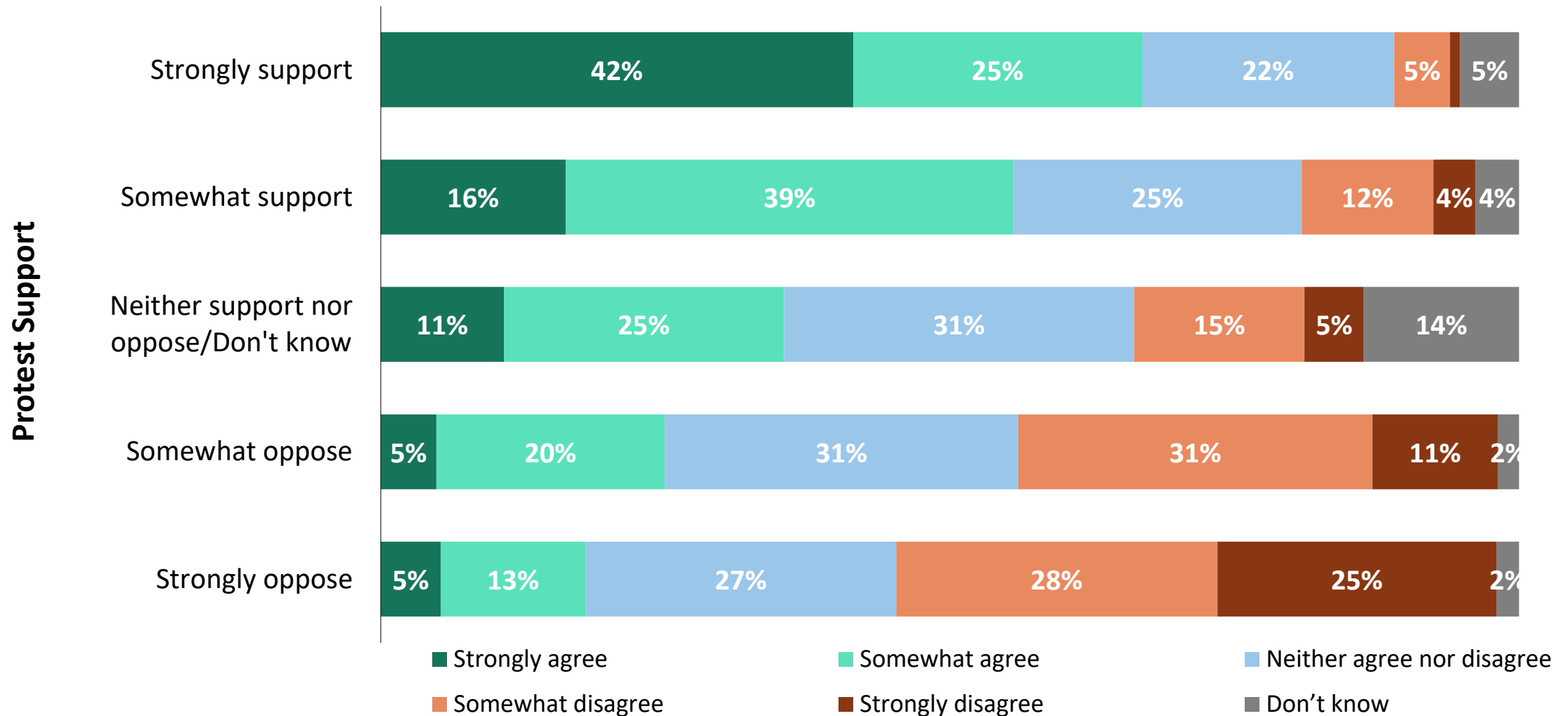
■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree
■ Somewhat disagree ■ Strongly disagree ■ Don't know



Free Enterprise: A majority of protest supporters agree that things would run pretty well by themselves



Do you agree or disagree with the following statements? ***Most things would run pretty well by themselves if the government just didn't interfere.***
 [asked of all respondents; n=1,000, February 2022]

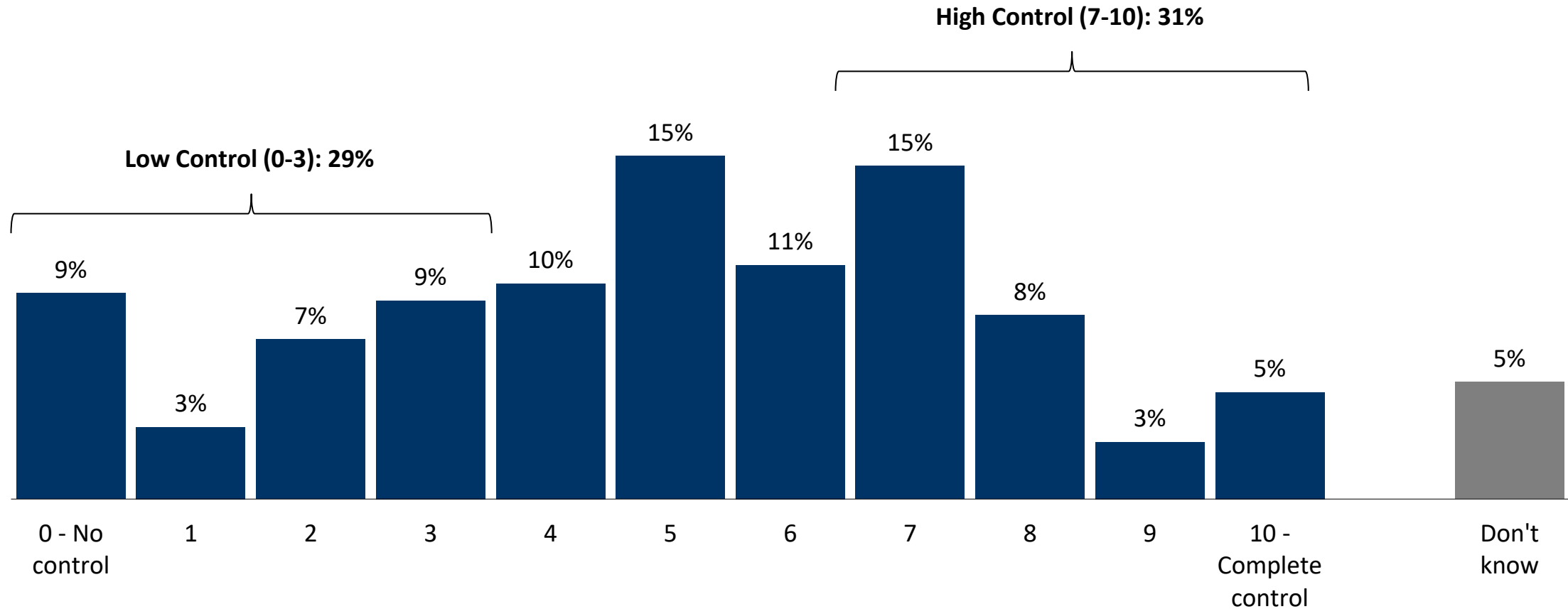


Pre-Test Control: Participants were split on how much control over their electricity bill they felt; one-in-ten (9%) say they have no control



On a scale from 0 to 10, where 0 represents no control and 10 represents complete control, how much control do you feel you have over the total size of your energy bill?

[asked of all respondents; n=1,200, May 2019]



Favourability by Control: Those who feel high control over their bill are far more likely to have a favourable impression of their local utility



Thinking about your local electricity company, please indicate whether you have a favourable or unfavourable impression or if you haven't really heard enough about it to have a firm impression? **BY CONTROL**

[asked of all respondents; n=1,200, May 2019]

	Low	Moderate	High	Don't know
Strongly favourable	6%	10%	27%	1%
Somewhat favourable	20%	34%	32%	14%
Neither favourable nor unfavourable	26%	28%	24%	16%
Somewhat unfavourable	21%	12%	5%	3%
Strongly unfavourable	11%	5%	3%	0%
Haven't heard enough to form a firm opinion/Don't know	16%	11%	9%	66%

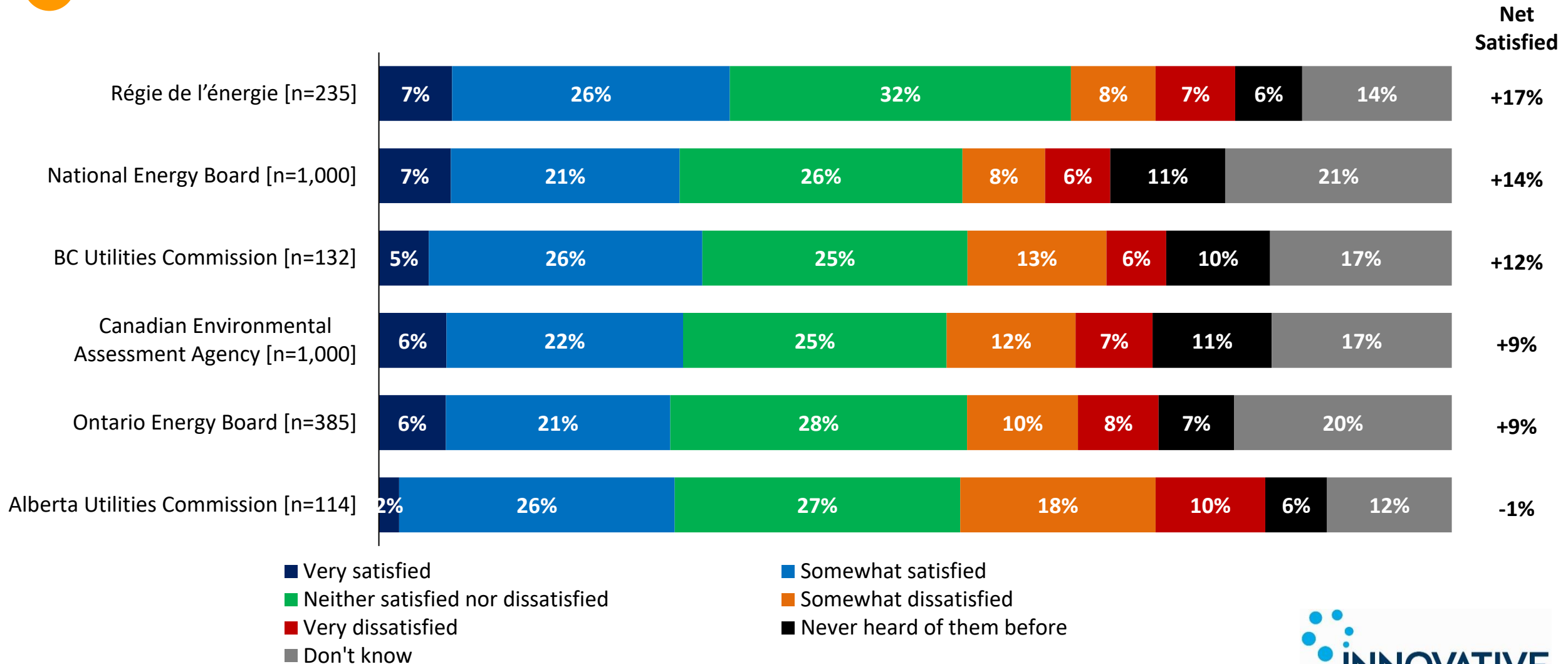
**Don't rely on regulatory
approvals for project
legitimacy**

Satisfaction with Regulators: Awareness of regulators is limited and reputations are varied



For each of the following organizations, please indicate how satisfied you are with the job they do at overseeing the energy industry in your province.

[asked of all respondents, n=1,000, November 2021]

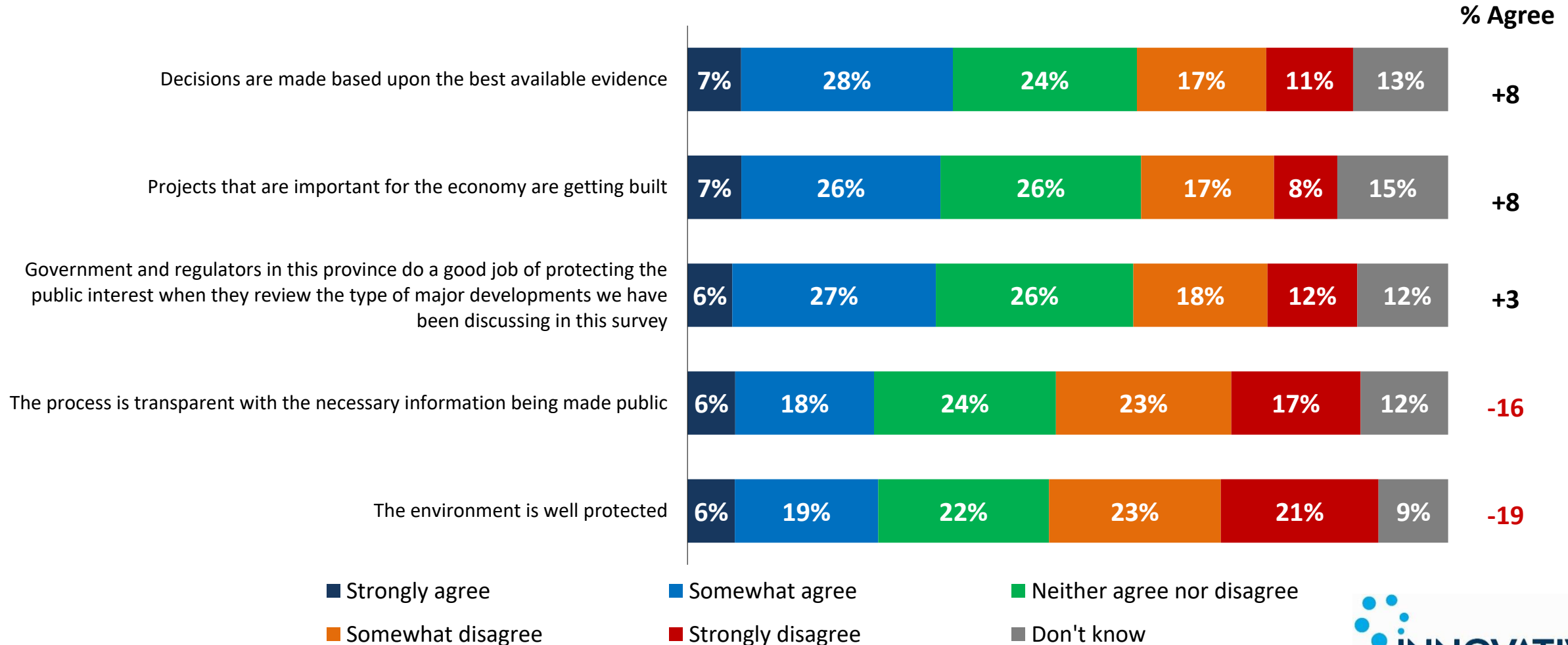


Key Attitudes: There is uncertainty and concern over regulatory outcomes



Thinking of the regulatory organizations that approve the types of projects that we have mentioned in this survey, do you agree with the following statements:

[asked of all respondents, n=1,000, November 2021]

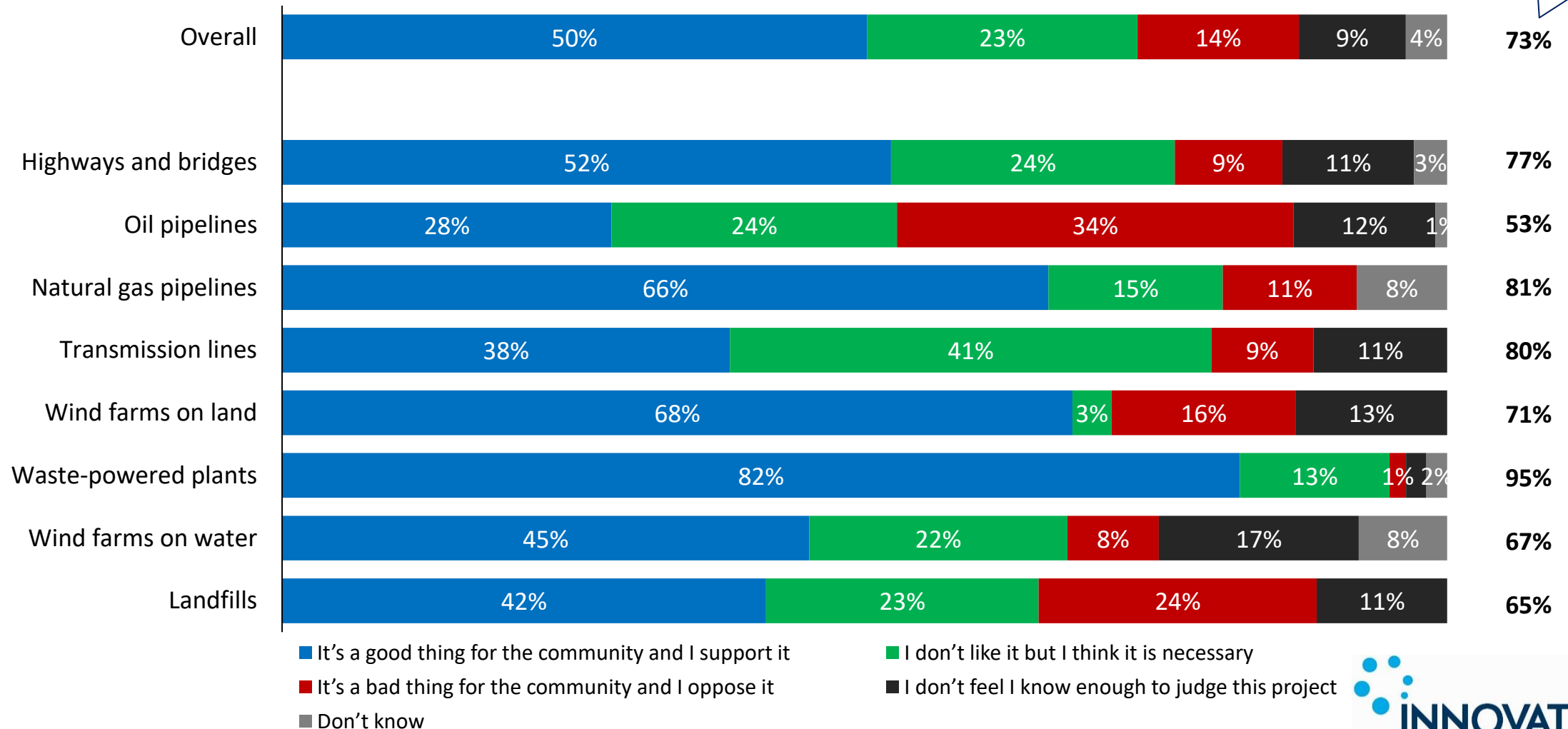


Social Permission: Despite mixed regulatory views, most actual projects have social permission



Which of the following best represents your view of that project?
[asked of those who selected a project 'closest' to their home, n=464, November 2021]

Total Permission
(support + necessary)

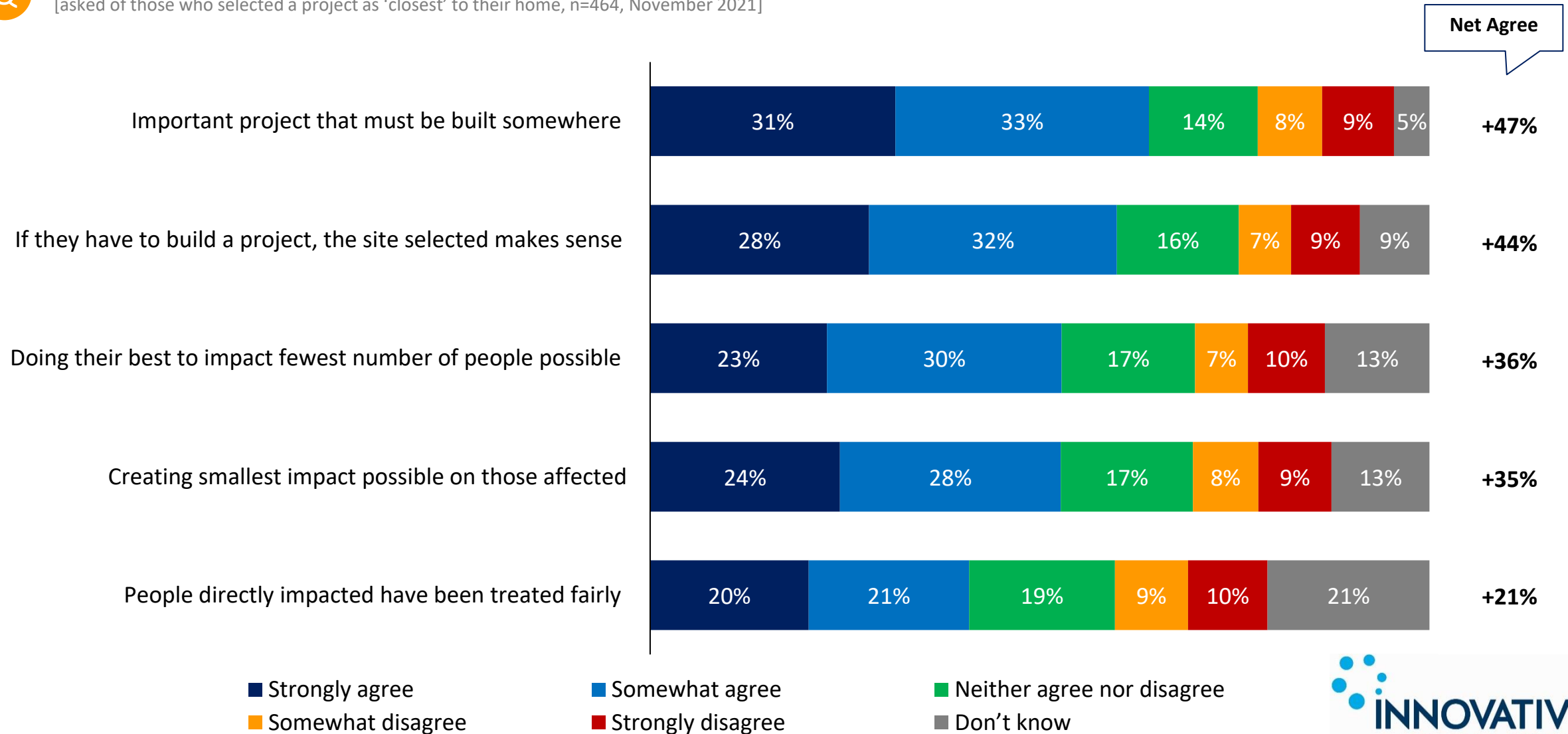


The Hurdles: Five veto questions that drive project legitimacy



Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?

[asked of those who selected a project as 'closest' to their home, n=464, November 2021]



Summing it up

1. We should not fool ourselves into thinking that just because everyone in our circle knows about and supports energy transition that the broader public is on board to achieve net zero, whatever the price.
2. The first big risk will be our conversation about how to best stretch our current system to deliver the maximum energy transition. I don't know how to do that without maximizing dispatchable load and dispatchable DERs. Done wrong it could be a fresh excuse for a renewed battle between control and choices – in other words freedom.
3. The next big challenge is building permission to build infrastructure.
4. The really big challenge happens in a couple of years as the bill impacts become more visible. If consumers are struggling due to inflation or a recession, if consumers have to pay the cost of increased weather and climate damage, and other countries are behind us, will they support paying even more?
5. What happens when the choice becomes health care or climate change?

So what do we do?



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Building Understanding.