



Study on Canadians' Perceptions of Hydrocarbon Energy

September 24, 2012

Marketing Intelligence



- Leger Marketing is the leading Canadian-owned market research and polling firm with more than 600 professionals working from its Canadian and American offices.
- Leger Marketing is the North American partner of WIN - the Worldwide Independent Network (WIN) of Market Research - the largest independent global network of market research.





RESEARCH METHODS

This poll was conducted online in all regions of Canada with a representative sample of 2,560 **Canadians** between **September 17 and 20, 2012**.

Final data were weighted by age, gender, language, level of education, household composition and region, in order to obtain a representative sample of the Canadian population.

A probabilistic sample of 2,560 respondents would yield a **margin of error of +/- 1.9%, 19 times out of 20**.

Survey respondents were selected randomly from the LegerWeb Internet panel, which is comprised of over 400,000 Canadian households. A stratification process was applied to invitation lists to ensure optimal representation of respondents. Panelists were recruited randomly during Leger Marketing telephone surveys. Several quality control measures ensure the representativeness and accuracy of Leger Marketing's surveys with its panel members.

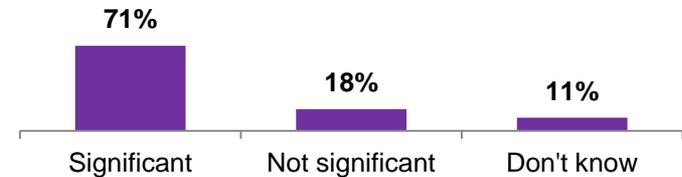
In the tables, numbers in bold red indicate a significantly higher proportion than that of other groups. Numbers in bold blue indicate a significantly lower proportion than that of other groups.

A majority of Canadians (71%) feel that the efforts made to limit the environmental impact of oil sands production are significant.

Canadians are unfamiliar with the efforts made by the oil sands industry to limit the environmental impact of oil sands production, and yet these efforts are perceived as significant, even though the industry could do more in this direction.

- Between 25% and 39% of Canadians are aware of the elements surveyed concerning the efforts to limit the environmental impact of the oil sands. It should be noted that the public is more aware of these elements in Alberta (between 32% and 61% depending on the elements measured.)
- However, when informed of these industry efforts to limit the environmental impact of oil sands production, 71% consider that these efforts are significant. It should be noted that in Quebec, this proportion is lower than in the rest of the country (54%).

Perception of the Efforts Made to Limit the Environmental Impact of Oil Sands Production



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The Best Approach for the Development of Oil Reserves from Oil Sands

A majority of Canadians (72%) support oil sands development, as long as a continuous effort is made to limit the environmental impact.

Part of Alberta's current and future wealth is linked to producing oil by developing the oil sands. In your opinion, what is the best approach for this resource?

	Total Canada (n=2,560)	Atlantic (n=179)	Québec (n=704)	Ontario (n=1012)	MB/SK (n=208)	Alberta (n=210)	BC (n=247)
To focus on maximizing the economic development of the oil sands	8%	6%	6%	9%	7%	8%	8%
To develop the oil sands while maintaining a continuous effort to limit the environmental impact	72%	74%	67%	69%	71%	85%	77%
To stop the development of the oil sands altogether	8%	5%	13%	6%	6%	2%	11%
Don't know	12%	15%	14%	16%	16%	5%	5%

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Perception of the Efforts to Limit the Environmental Impact of Oil Sands Production

For most Canadians (71%), efforts to limit the environmental impact of oil sands are significant.

According to you, are the following measures to limit the environmental impact of oil sands production significant or not?

- Greenhouse gas emissions per barrel of oil produced from the Canadian Oil Sands have fallen by 29% since 1990.
- Around 70% of the water used in oil sands projects is now recycled.
- A new technology could soon eliminate tailing ponds, which contain toxic discharges from oil sands production.
- 80% of the oil sands can only be produced through drilling techniques that use much less land than mining.

	Total Canada (n=2,560)	Atlantic (n=179)	Québec (n=704)	Ontario (n=1012)	MB/SK (n=208)	Alberta (n=210)	BC (n=247)
Total significant	71%	75%	54%	75%	76%	87%	75%
Very significant	29%	28%	11%	34%	37%	47%	34%
Somewhat significant	42%	47%	43%	41%	38%	40%	41%
Total not significant	18%	10%	35%	12%	11%	7%	15%
Not very significant	15%	9%	30%	10%	10%	5%	12%
Completely insignificant	3%	1%	5%	2%	2%	2%	3%
Don't know	11%	14%	11%	13%	13%	6%	10%

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Canadians' Knowledge of Efforts Made to Reduce the Environmental Impact of Oil Sands

Did you know that:

A small proportion of Canadians are aware of the efforts to limit the environmental impact of oil sands.

		Total Canada (n=2,560)	Atlantic (n=179)	Québec (n=704)	Ontario (n=1012)	MB/SK (n=208)	Alberta (n=210)	BC (n=247)
Greenhouse gas emissions per barrel of oil produced from the Canadian Oil Sands have fallen by 29% since 1990.	Yes	25%	25%	20%	25%	24%	38%	28%
	No	75%	75%	80%	75%	76%	62%	72%
Around 70% of the water used in oil sands projects is now recycled.	Yes	39%	38%	27%	38%	47%	61%	42%
	No	61%	62%	73%	62%	53%	39%	58%
A new technology could soon eliminate tailing ponds, which contain toxic discharges from oil sands production.	Yes	25%	22%	17%	25%	27%	44%	24%
	No	75%	78%	83%	75%	73%	56%	76%
80% of the oil sands can only be produced through drilling techniques that use much less land than mining.	Yes	29%	28%	30%	27%	31%	32%	31%
	No	71%	72%	70%	73%	69%	68%	69%

