Institut économique de Montréal
Des idées pour enrichir le Québec

Leger MARKETING

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.

WIN Worldwide Independent 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.

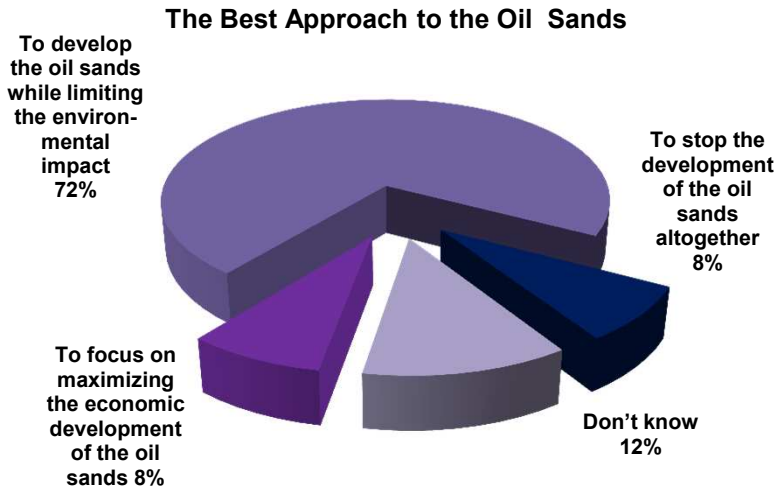
KEY INSIGHTS

Study on Canadians' Perceptions of Hydrocarbon Energy

Develop the oil sands while maintaining a continuous effort to limit the environmental impact.

Canadians generally have a favourable view of developing the oil sands, as long as a continuous effort is made to limit the environmental impact.

- In fact, 72% of Canadians consider that the best approach for the oil sands is to develop this industry while limiting its environmental impact.
- This position is shared by a majority of Canadians from coast to coast, but to varying degrees: in Alberta, 85% consider that this approach to developing the oil sands is the best, while this proportion is 69% in Ontario and 67% in Quebec.
- Finally, it should be noted that this approach for the oil sands receives more support from Conservative and Liberal voters (81%), and also receives the support of a majority of voters from the other parties..



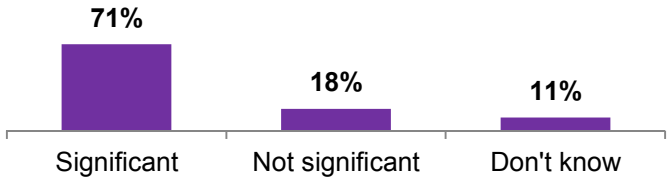
Study on Canadians' Perceptions of Hydrocarbon Energy

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%).
- Moreover, half of Canadians (49%) said that knowing about the efforts to limit the environmental impact of oil sands production changed their perception of this resources in a positive manner.

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



- When asked if, in their opinion, industries are doing enough to limit the impact of the oil sands on the environment, 45% of Canadians do not agree, while a third agree with this statement. It should be noted that in Alberta 52% agree with this statement, while this proportion only reaches 21% in Quebec.

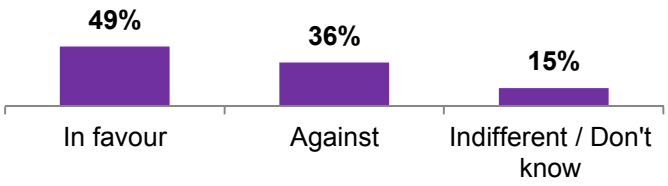
Study on Canadians' Perceptions of Hydrocarbon Energy

There is a lack of consensus among the Canadian population about the Northern Gateway project, and the pipeline reversal project between Alberta and Eastern Canada is not well known.

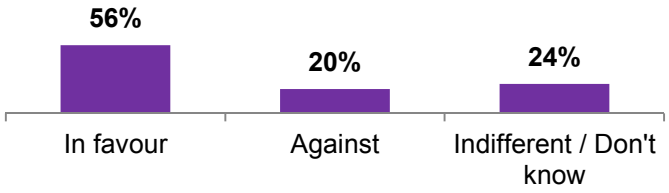
The *Northern Gateway* project divides Canadians, while the pipeline reversal project to bring Alberta oil to Eastern Canada is more positively perceived, but less well known.

- Six Canadians out of ten (60%) know about the *Northern Gateway* project. This project is very well known in Western Canada (awareness is 92% in Alberta and 87% in British Columbia), but little-known in Quebec (34%).
- Although half of Canadians who know about the *Northern Gateway* project (49%) are in favour of this project, 36% are against it, and 15% did not provide an opinion. It should be noted that opposition to this project is stronger in British Columbia, where 51% are against it.
- The pipeline reversal project to bring Alberta oil to Eastern Canada is not well known among Canadians: only 28% have heard about this project.
- More than half of Canadians surveyed about this pipeline reversal project (56%) said they were in favour of this project, versus 20% who are against it, and 24% who did not provide an opinion.
- Finally, it should be noted that a majority of Conservative voters are in favour of both these projects (75% for the *Northern Gateway* and 72% for the pipeline reversal project), and Liberal voters are also in favour, but to a lesser extent (51% et 63%).

Approval Rates for the Northern Gateway Project



Approval Rates for the Pipeline Reversal Project



Study on Canadians' Perceptions of Hydrocarbon Energy

The majority of Canadians do not know where the oil used in Quebec comes from, but would like it to come mainly from Canada.

More than six out of ten Canadians (62%) do not know where the oil for use in Québec comes from, and only 12% identified one of the two main oil sources.

- Although a stronger proportion of Quebecers identified one of the two main sources of the oil used in Quebec (19%), the vast majority of Quebecers still don't know or incorrectly identify (48%) oil sources.
- The majority of Canadians, however, regardless of region, would like this oil to come from Canada.

Alberta's prosperity is beneficial for Quebec according to 70% of Albertans, but only according to 34% of Quebecers.

- Though 40% of Canadians feel that Alberta's prosperity is beneficial to Quebec, it should be noted that a similar proportion (36%) does not know.
- Canadians from various regions (62%), however, agree that Quebec should take advantage of Alberta's technical expertise in order to develop its own oil and gas resources. In Quebec, this proportion is 63% (62% in March 2011).

	Total Canada (n=2 560)	Desired Oil Source for Québec	Oil Source for Québec in 2010 *
No, I don't know where the oil comes from	**62%**	-	-
Middle East	**23%**	2%	0%
Canada / Domestic sources	**17%**	73%	12%
Northern Sea	**9%**	5%	20%
Africa	**3%**	1%	39%
Other countries	**-**	1%	28%

* Sources: *La provenance des approvisionnements de pétrole brut 1985-2010*, Ministère des Ressources naturelles et de la Faune du Québec and Statistics Canada

2005 25%
2006 35%
2007 36%
2008 48%
2009 55%
2010 80%
2011 85%
2012
2013
2015
+10%
+40%
DETAILED ANALYSIS
OF RESULTS
50 041
30 000
59 020
72 007
50
50

Study on Canadians' Perceptions of Hydrocarbon Energy

Alberta's Prosperity and its Impact on Quebec

Four Canadians out of ten (40%) think that Alberta's prosperity is beneficial for Quebec.

This proportion reaches 70% among Albertans, and is 34% among Quebecers.

Question 1A – Do you agree or disagree with the following statement?
Alberta's prosperity - partly the result of exploiting the oil sands - is beneficial for Quebec.

	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 agree	**40%**	32%	**34%**	39%	41%	**70%**	39%
Strongly agree	**15%**	9%	**11%**	13%	12%	**38%**	12%
Somewhat agree	**26%**	22%	23%	25%	29%	32%	27%
Total disagree	**24%**	22%	**41%**	**19%**	20%	**10%**	20%
Somewhat disagree	**15%**	14%	**25%**	13%	15%	**6%**	12%
Strongly disagree	**9%**	8%	**16%**	**6%**	5%	**4%**	8%
Don't know	**36%**	**47%**	**25%**	**42%**	39%	**20%**	41%

Quebec Should Take Advantage of Alberta's Technical Expertise to Develop Its Own Oil and Gas Resources

A majority of Canadians (62%) think Quebec should take advantage of Alberta's technical expertise to develop its own oil and gas resources.

Question 1B – Do you agree or disagree with the following statement?
Quebec should take advantage of Alberta's technical expertise in order to develop its own oil and gas resources.

	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 agree	**62%**	65%	63%	**58%**	62%	**73%**	64%
Strongly agree	**22%**	19%	20%	20%	24%	**35%**	20%
Somewhat agree	**40%**	45%	43%	38%	38%	38%	44%
Total disagree	**15%**	12%	**23%**	13%	**8%**	12%	13%
Somewhat disagree	**9%**	8%	**14%**	8%	6%	4%	6%
Strongly disagree	**6%**	4%	**9%**	5%	3%	7%	7%
Don't know	**23%**	23%	**14%**	**29%**	30%	**15%**	23%

Perception of Efforts Made by Companies to Limit the Environmental Impact of Exploiting Canadian Oil Sands

Close to half of Canadians (45%) believe that companies exploiting the Canadian Oil Sands are not making sufficient efforts to limit the environmental impact, while a third (33%) think the opposite.

Question 1C – Do you agree or disagree with the following statement?
While more improvements are always possible and desirable, the efforts currently made in order to limit the environmental impact of the Canadian Oil Sands are sufficient.

	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 agree	**33%**	29%	**21%**	36%	**42%**	**52%**	31%
Strongly agree	**8%**	5%	**4%**	10%	12%	**16%**	8%
Somewhat agree	**25%**	24%	**17%**	26%	30%	**37%**	23%
Total disagree	**45%**	44%	**59%**	**38%**	**36%**	**37%**	51%
Somewhat disagree	**24%**	26%	**29%**	**20%**	18%	21%	29%
Strongly disagree	**21%**	18%	**30%**	**17%**	17%	15%	22%
Don't know	**22%**	27%	20%	**27%**	22%	**11%**	18%

Study on Canadians' Perceptions of Hydrocarbon Energy

Perception of Environmental Lobbies

More than half of Canadians (52%) believe that several environmental lobbies are too radical.

Question 1D – Do you agree or disagree with the following statement?
Several environmental lobbies are too radical.

	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 agree	**52%**	53%	**46%**	52%	52%	**70%**	48%
Strongly agree	**21%**	17%	**15%**	21%	25%	**37%**	18%
Somewhat agree	**31%**	35%	31%	31%	26%	33%	31%
Total disagree	**27%**	28%	**31%**	25%	25%	**18%**	33%
Somewhat disagree	**16%**	17%	**20%**	16%	17%	11%	16%
Strongly disagree	**11%**	11%	12%	9%	9%	7%	**17%**
Don't know	**21%**	19%	23%	23%	23%	**12%**	19%

Study on Canadians' Perceptions of Hydrocarbon Energy

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.

Question 2 – 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%**

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

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

Question 3 – Did you know that:

		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%

Study on Canadians' Perceptions of Hydrocarbon Energy

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.

Question 4 – 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 unsignificant	**3%**	1%	**5%**	**2%**	2%	2%	3%
Don't know	**11%**	14%	11%	13%	13%	**6%**	10%

Study on Canadians' Perceptions of Hydrocarbon Energy

Impact of Awareness of Industry Efforts to Reduce the Oil Sands' Environmental Impact on Canadian Perception of this Resource

For almost half of Canadians (49%), knowing about the efforts made to limit the environmental impact of oil sands does change their perception of the Canadian Oil Sands in a positive direction.

Question 5 – Does knowing these facts change your perception of the Canadian Oil Sands? If yes, in which direction has it changed?

	Total Canada (n=2,560)	Atlantic (n=179)	Québec (n=704)	Ontario (n=1012)	MB/SK (n=208)	Alberta (n=210)	BC (n=247)
Yes, in a positive direction	**49%**	53%	**42%**	50%	48%	**59%**	47%
Yes, in a negative direction	**4%**	3%	**7%**	3%	5%	1%	4%
No, knowing these don't change my perception of the Canadian Oil Sands	**47%**	45%	**51%**	46%	47%	40%	49%

Study on Canadians' Perceptions of Hydrocarbon Energy

Knowledge of the Northern Gateway Project and the Pipeline Reversal Project between Alberta and Eastern Canada

While more than half of Canadians (60%) are aware of the Northern Gateway project, only 28% are familiar with the pipeline reversal project between Alberta and Eastern Canada.

Question 6 – Have you heard about …

		Total Canada (n=2,560)	Atlantic (n=179)	Québec (n=704)	Ontario (n=1012)	MB/SK (n=208)	Alberta (n=210)	BC (n=247)
… the Northern Gateway project, a pipeline that would bring Alberta oil to British Columbia in order to facilitate access to foreign markets?	**Yes**	**60%**	60%	**34%**	**56%**	**69%**	**92%**	**87%**
	No	**40%**	40%	**66%**	**44%**	**31%**	**8%**	**13%**
… a pipeline reversal project to bring Alberta oil to Ontario and Quebec refineries?	**Yes**	**28%**	33%	28%	28%	**18%**	**36%**	25%
	No	**72%**	67%	72%	72%	**82%**	**64%**	75%

Study on Canadians' Perceptions of Hydrocarbon Energy

Support for the Northern Gateway Project

Among Canadians who know about the Northern Gateway project, half of them (49%) support the project, while over a third (36%) are against it, and 15% do not have an opinion.

Question 7A – Are you in favour or against the Northern Gateway project?
Base: respondents who have heard about at least of one of the two pipeline projects (n=1,721)

	Total Canada (n=1,721)	Atlantic (n=123)	Québec (n=350)	Ontario (n=664)	MB/SK (n=159)	Alberta (n=198)	BC (n=227)
Total in favour	**49%**	43%	44%	52%	51%	**61%**	**39%**
Strongly in favour	**19%**	13%	16%	20%	19%	**31%**	**9%**
Somewhat in favour	**30%**	30%	28%	32%	32%	30%	30%
Total against	**36%**	37%	39%	32%	29%	**25%**	**51%**
Somewhat against	**18%**	22%	20%	18%	18%	**12%**	20%
Strongly against	**18%**	15%	19%	**14%**	11%	13%	**31%**
Indifferent	**6%**	9%	6%	7%	8%	6%	4%
Don't know	**9%**	11%	11%	9%	12%	8%	6%

Support for the Pipeline Reversal Project between Alberta and Eastern Canada

A small majority of Canadians (56%) support the proposed pipeline reversal project between Alberta and Eastern Canada.

Question 7B – Are you in favour or against a pipeline reversal project to bring Alberta oil to Ontario and Quebec refineries?

Base: respondents who have heard about at least of one of the two pipeline projects (n=1,721)

	Total Canada (n=1,721)	Atlantic (n=123)	Québec (n=350)	Ontario (n=664)	MB/SK (n=159)	Alberta (n=198)	BC (n=227)
Total in favour	**56%**	67%	60%	**65%**	**45%**	55%	**36%**
Strongly in favour	**25%**	31%	22%	**33%**	18%	22%	**12%**
Somewhat in favour	**32%**	35%	**38%**	32%	27%	33%	**24%**
Total against	**20%**	12%	**27%**	**16%**	21%	21%	23%
Somewhat against	**11%**	8%	13%	10%	14%	10%	14%
Strongly against	**8%**	4%	**13%**	**6%**	7%	11%	9%
Indifferent	**8%**	7%	**5%**	7%	11%	7%	**15%**
Don't know	**16%**	14%	**9%**	**12%**	23%	17%	**26%**

Study on Canadians' Perceptions of Hydrocarbon Energy

Knowledge of Where the Oil Consumed in Quebec Comes From

The majority of Canadians do not know where the oil consumed in Quebec comes from.

Question 8 – Do you know where the oil used to make gasoline, heating oil and jet fuel for use in Quebec comes from? If yes, where?

	Total Canada (n=2,560)	Atlantic (n=179)	Québec (n=704)	Ontario (n=1012)	MB/SK (n=208)	Alberta (n=210)	BC (n=247)
No, I don't know where the oil comes from	**62%**	66%	**48%**	**69%**	**72%**	62%	61%
Middle East	**23%**	22%	**36%**	**18%**	**12%**	23%	21%
Canada / Domestic sources (Alberta, Newfoundland, etc.)	**17%**	16%	14%	16%	20%	17%	**24%**
Northern Sea	**9%**	5%	**15%**	**7%**	6%	10%	5%
Africa	**3%**	3%	4%	3%	4%	3%	3%

Study on Canadians' Perceptions of Hydrocarbon Energy

Preferred Oil Source for Use in Quebec

For most Canadians (73%), the oil consumed in Quebec should mainly come from Canada.

Question 9 – As long as Quebecers continue to use oil, where should they get it from?

	Total Canada (n=2,560)	**Atlantic** (n=179)	**Québec** (n=704)	**Ontario** (n=1012)	**MB/SK** (n=208)	**Alberta** (n=210)	**BC** (n=247)
From Canada / domestic sources	**73%**	78%	73%	72%	68%	79%	76%
Middle East	**2%**	1%	2%	2%	1%	1%	2%
Northern Sea	**5%**	1%	**7%**	5%	3%	4%	2%
Africa	**1%**	0%	**2%**	**0%**	0%	1%	1%
Other	**1%**	1%	1%	2%	2%	1%	1%
Don't know	**18%**	18%	**15%**	20%	**26%**	14%	18%

Detailed Results By Federal Voting Intentions

Alberta's Prosperity and its Impact on Quebec

Question 1A – Do you agree or disagree with the following statement?
Alberta's prosperity - partly the result of exploiting the oil sands - is beneficial for Quebec.

	Total Canada (n=2,560)	CP	NDP	LPC	BQ	GP
Total agree	**40%**	**60%**	**32%**	46%	**19%**	40%
Strongly agree	**15%**	**29%**	**8%**	13%	**7%**	**4%**
Somewhat agree	**26%**	30%	**25%**	**33%**	**12%**	36%
Total disagree	**24%**	**12%**	**35%**	26%	**59%**	27%
Somewhat disagree	**15%**	**8%**	**22%**	18%	**32%**	16%
Strongly disagree	**9%**	**4%**	**14%**	8%	**27%**	11%
Don't know	**36%**	28%	32%	28%	22%	33%

Quebec Should Take Advantage of Alberta's Technical Expertise to Develop Its Own Oil And Gas Resources

Question 1B – Do you agree or disagree with the following statement?
Quebec should take advantage of Alberta's technical expertise in order to develop its own oil and gas resources.

	Total Canada (n=2,560)	CP	NDP	LPC	BQ	GP
Total agree	**62%**	**79%**	**61%**	71%	**52%**	**58%**
Strongly agree	**22%**	**36%**	**17%**	21%	**11%**	16%
Somewhat agree	**40%**	43%	44%	**50%**	41%	42%
Total disagree	**15%**	**7%**	**21%**	12%	**34%**	22%
Somewhat disagree	**9%**	**4%**	**11%**	7%	**19%**	14%
Strongly disagree	**6%**	**4%**	**9%**	5%	**16%**	8%
Don't know	**23%**	14%	18%	17%	14%	20%

Perception of Efforts Made by Companies to Limit the Environmental Impact of Exploiting Canadian Oil Sands

Question 1C – Do you agree or disagree with the following statement?
While more improvements are always possible and desirable, the efforts currently made in order to limit the environmental impact of the Canadian Oil Sands are sufficient.

	Total Canada (n=2,560)	CP	NDP	LPC	BQ	GP
Total agree	**33%**	**58%**	**21%**	31%	**10%**	**21%**
Strongly agree	**8%**	**18%**	**3%**	**6%**	**2%**	5%
Somewhat agree	**25%**	**40%**	**18%**	25%	**8%**	**16%**
Total disagree	**45%**	**25%**	**63%**	**55%**	**80%**	**64%**
Somewhat disagree	**24%**	**18%**	**30%**	**32%**	29%	26%
Strongly disagree	**21%**	**7%**	**33%**	23%	**51%**	**38%**
Don't know	**22%**	17%	16%	14%	10%	15%

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Perception of Environmental Lobbies

Question 1D – Do you agree or disagree with the following statement?
Several environmental lobbies are too radical.

	Total Canada (n=2,560)	CP	NDP	LPC	BQ	GP
Total agree	**52%**	**75%**	**45%**	57%	**39%**	**37%**
Strongly agree	**21%**	**42%**	**12%**	**19%**	**9%**	**9%**
Somewhat agree	**31%**	33%	33%	38%	30%	28%
Total disagree	**27%**	**13%**	**40%**	32%	**43%**	**46%**
Somewhat disagree	**16%**	**11%**	**21%**	20%	24%	20%
Strongly disagree	**11%**	**2%**	**19%**	11%	**19%**	**26%**
Don't know	**21%**	12%	15%	12%	18%	17%

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

Question 2 – 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)	CP	NDP	LPC	BQ	GP
To focus on maximizing the economic development of the oil sands	**8%**	**13%**	**4%**	6%	**1%**	7%
To develop the oil sands while maintaining a continuous effort to limit the environmental impact	**72%**	**81%**	75%	81%	**65%**	**67%**
To stop the development of the oil sands altogether	**8%**	**1%**	**13%**	6%	**23%**	**18%**
Don't know	**12%**	5%	8%	7%	10%	8%

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

Question 3 – Did you know that:

		Total Canada (n=2,560)	CP	NDP	LPC	BQ	GP
Greenhouse gas emissions per barrel of oil produced from the Canadian Oil Sands have fallen by 29% since 1990.	**Yes**	**25%**	**37%**	**20%**	24%	22%	18%
	No	**75%**	**63%**	**80%**	76%	78%	82%
Around 70% of the water used in oil sands projects is now recycled.	**Yes**	**39%**	**52%**	**33%**	42%	**22%**	35%
	No	**61%**	**48%**	**67%**	58%	**78%**	65%
A new technology could soon eliminate tailing ponds, which contain toxic discharges from oil sands production.	**Yes**	**25%**	**36%**	**21%**	25%	**12%**	**12%**
	No	**75%**	**64%**	**79%**	75%	**88%**	**88%**
80% of the oil sands can only be produced through drilling techniques that use much less land than mining.	**Yes**	**29%**	32%	29%	28%	28%	23%
	No	**71%**	68%	71%	72%	72%	77%

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

Question 4 – 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)	CP	NDP	LPC	BQ	GP
Total significant	**71%**	**87%**	**67%**	75%	**42%**	68%
Very significant	**29%**	**49%**	**20%**	29%	**2%**	31%
Somewhat significant	**42%**	**38%**	**46%**	46%	40%	37%
Total not significant	**18%**	**6%**	**26%**	19%	**51%**	24%
Not very significant	**15%**	**5%**	**22%**	16%	**40%**	18%
Completely unsignificant	**3%**	**1%**	4%	3%	**11%**	6%
Don't know	**11%**	7%	7%	7%	7%	8%

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Impact of Awareness of Industry Efforts to Reduce the Oil Sands' Environmental Impact on Canadian Perception of this Resource

Question 5 – Does knowing these facts change your perception of the Canadian Oil Sands? If yes, in which direction has it changed?

	Total Canada (n=2,560)	CP	NDP	LPC	BQ	GP
Yes, in a positive direction	**49%**	**68%**	**42%**	53%	**29%**	**37%**
Yes, in a negative direction	**4%**	**1%**	5%	5%	**10%**	6%
No, knowing these don't change my perception of the Canadian Oil Sands	**47%**	**31%**	**53%**	41%	**60%**	**57%**

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Knowledge of the Northern Gateway Project and the Pipeline Reversal Project between Alberta and Eastern Canada

Question 6 – Have you heard about …

		Total Canada (n=2,560)	CP	NDP	LPC	BQ	GP
… the Northern Gateway project, a pipeline that would bring Alberta oil to British Columbia in order to facilitate access to foreign markets?	**Yes**	**60%**	**72%**	**61%**	67%	**30%**	70%
	No	**40%**	**28%**	**39%**	33%	**70%**	30%
… a pipeline reversal project to bring Alberta oil to Ontario and Quebec refineries?	**Yes**	**28%**	32%	28%	32%	30%	27%
	No	**72%**	68%	72%	68%	70%	73%

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Support for the Northern Gateway Project

Question 7A – Are you in favour or against the Northern Gateway project?
Base: respondents who have heard about at least of one of the two pipeline projects (n=1,721)

	Total Canada (n=1,721)	CP	NDP	LPC	BQ	GP
Total in favour	**49%**	**75%**	**30%**	51%	**37%**	**23%**
Strongly in favour	**19%**	**35%**	**7%**	16%	**6%**	**10%**
Somewhat in favour	**30%**	**39%**	**23%**	35%	32%	**13%**
Total against	**36%**	**15%**	**56%**	40%	**53%**	**59%**
Somewhat against	**18%**	**11%**	**23%**	21%	29%	27%
Strongly against	**18%**	**4%**	**32%**	19%	25%	**32%**
Indifferent	**6%**	5%	7%	4%	1%	6%
Don't know	**9%**	5%	8%	4%	9%	12%

Support for the Pipeline Reversal Project between Alberta and Eastern Canada

Question 7B – Are you in favour or against a pipeline reversal project to bring Alberta oil to Ontario and Quebec refineries?
Base: respondents who have heard about at least of one of the two pipeline projects (n=1,721)

	Total Canada (n=1,721)	CP	NDP	LPC	BQ	GP
Total in favour	**56%**	**72%**	**48%**	63%	55%	**30%**
Strongly in favour	**25%**	**37%**	**18%**	30%	**15%**	**8%**
Somewhat in favour	**32%**	35%	29%	33%	40%	22%
Total against	**20%**	**11%**	**26%**	17%	**40%**	**30%**
Somewhat against	**11%**	**7%**	12%	9%	**20%**	17%
Strongly against	**8%**	**3%**	**14%**	8%	**20%**	14%
Indifferent	**8%**	6%	10%	6%	4%	**15%**
Don't know	**16%**	**10%**	16%	14%	**1%**	**25%**

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Knowledge of Where the Oil Consumed in Quebec Comes From

Question 8 – Do you know where the oil used to make gasoline, heating oil and jet fuel for use in Quebec comes from? If yes, where?

	Total Canada (n=2,560)	CP	NDP	LPC	BQ	GP
No, I don't know where the oil comes from	**62%**	60%	60%	60%	**40%**	58%
Middle-East	**23%**	23%	25%	22%	**47%**	24%
Canada / Domestic sources (Alberta, Newfoundland, etc.)	**17%**	21%	**15%**	22%	13%	15%
Northern Sea	**9%**	9%	12%	8%	14%	9%
Africa	**3%**	4%	4%	4%	5%	3%

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Preferred Oil Source for Use in Quebec

Question 9 – As long as Quebecers continue to use oil, where should they get it from?

	Total Canada (n=2,560)	CP	NDP	LPC	BQ	GP
From Canada / domestic sources	**73%**	**83%**	76%	78%	**65%**	70%
Middle East	**5%**	4%	3%	4%	**12%**	5%
Northern Sea	**2%**	1%	2%	3%	3%	3%
Africa	**1%**	1%	1%	1%	1%	0%
Other	**1%**	1%	1%	1%	1%	4%
Don't know	**18%**	**10%**	**17%**	14%	18%	19%

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