

Prepared by:

Innovative Research Group, Inc.

Toronto • Vancouver

www.innovativeresearch.ca



Canada This Month

Revisiting Canada as an Energy Superpower



Methodology

- These are the findings of an Innovative Research Group (INNOVATIVE) poll conducted from April 29 to May 10th, 2013.
- This online survey of 2,135 Canadian adults was conducted on INNOVATIVE's Canada 20/20 national panel.
- The Canada 20/20 Panel is recruited from a wide variety of sources to reflect the age, gender and region characteristics of the country as a whole. 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. This survey was weighted down to 1,084 to manage oversamples in British Columbia, Alberta and Ontario.
- INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey and panel members can only complete a particular survey once.
- Since the online survey was not a random, probability based sample, a margin of error could not be calculated. The Marketing Research and Intelligence Association prohibits statements about margins of sampling error or population estimates with regard to most online panels.
- The margin of error for a probability-based random sample of 1,084 using a probability sample is ± 2.9 percentage points, 19 times out of 20.
- The earlier study conducted in 2007 was also conducted on the Canada 20/20 Panel on behalf of Canadian Defense and Foreign Affairs Institute (CDFAI). The full report can be found here <http://www.cdfai.org/PDF/CDFAI%20Conference%202007%20Poll.pdf>

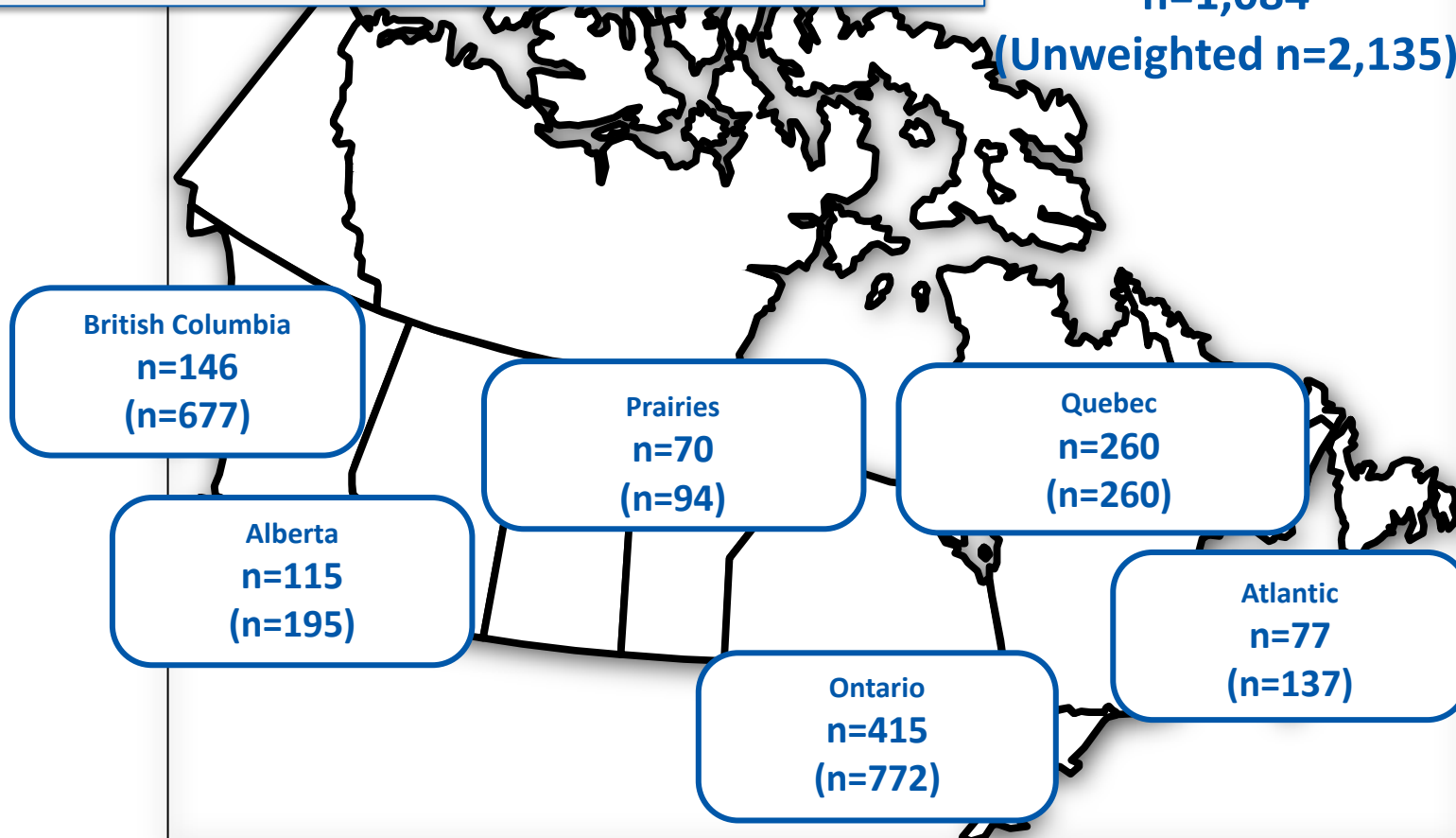
Note: *Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

Segmentation: Where did respondents come from?

Regional groupings include:

- British Columbia (Yukon)
- Alberta (Northwest Territories)
- Prairie Region (Manitoba, Saskatchewan and Nunavut)
- Ontario
- Quebec
- Atlantic (PEI, New Brunswick, Nova Scotia and Newfoundland & Labrador)

**National Weighted
Sample**
n=1,084
(Unweighted n=2,135)

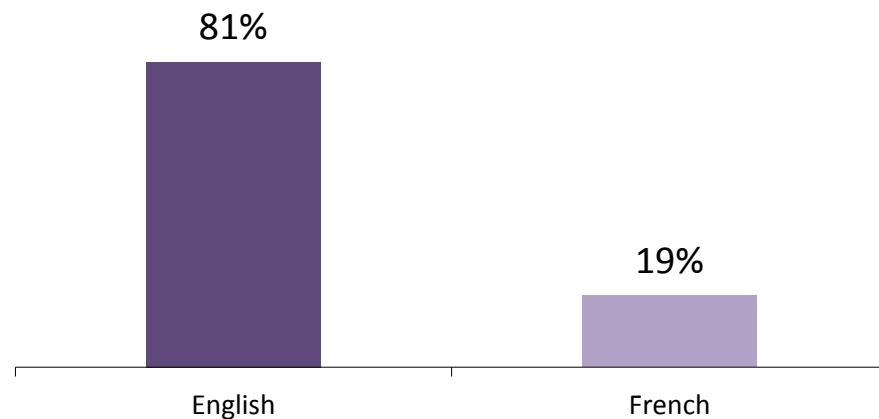


Demographics: *Respondent Profile*

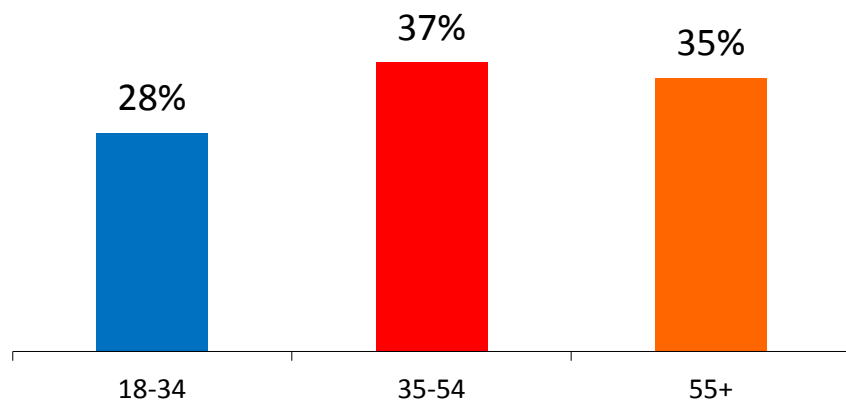
Gender



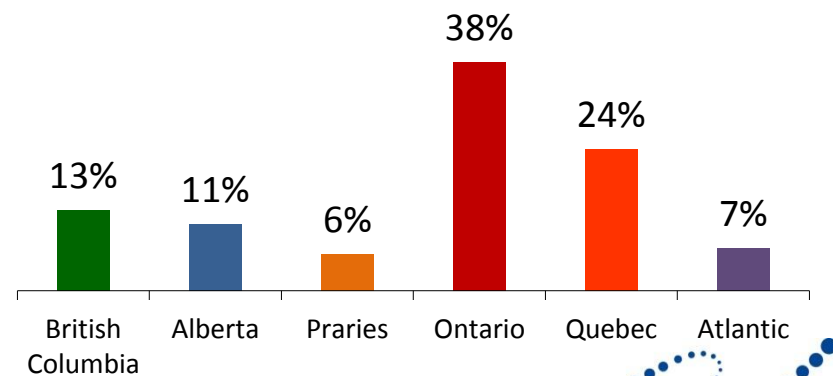
Language



Age



Regions

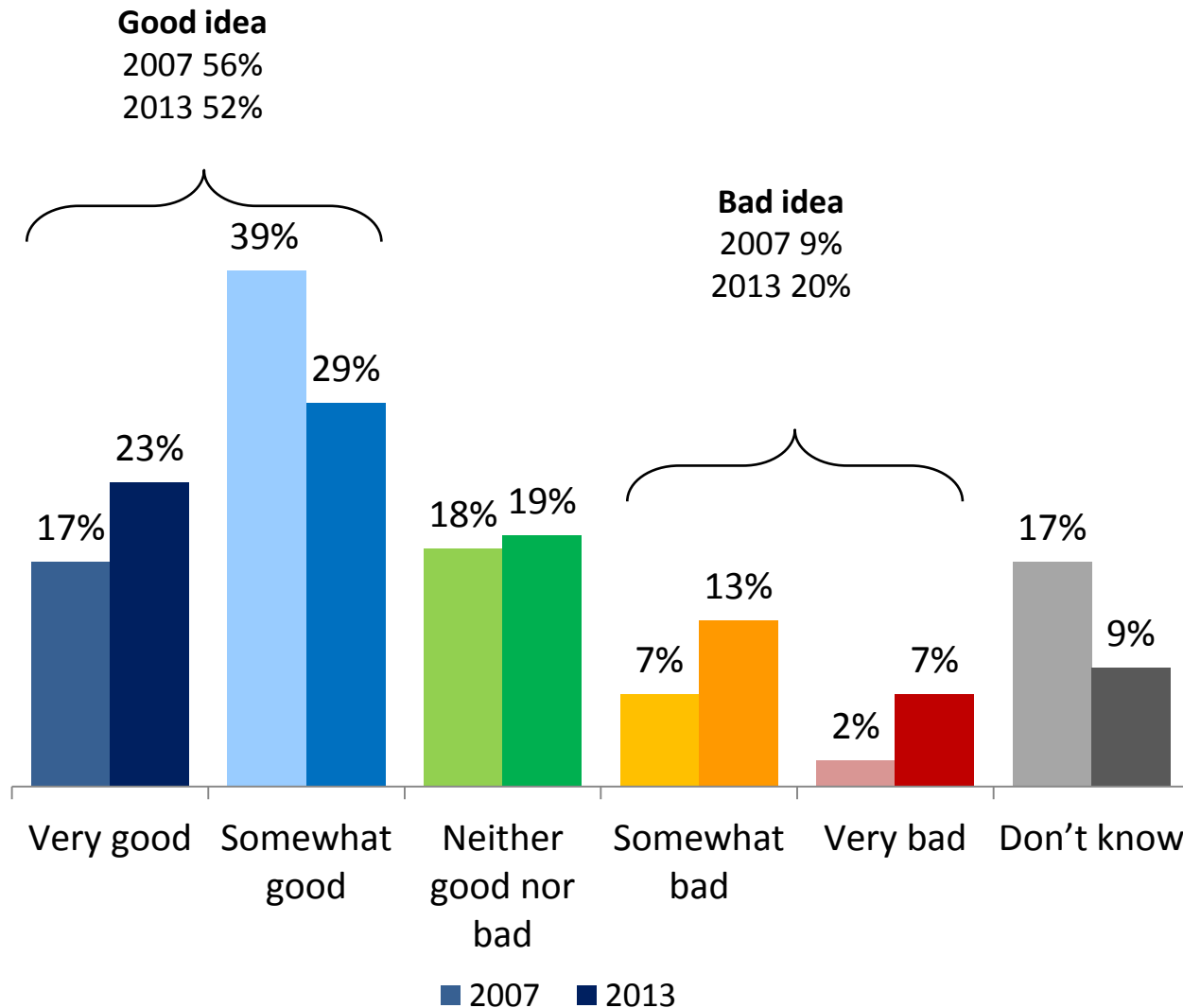


Canada's Energy

Canada's Energy Super Power: Over last 6 years, "bad idea" up at expense of "don't know"

Q

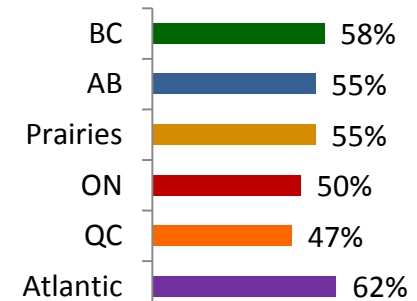
As a concept do you think Canada as an emerging energy superpower is a good idea or a bad idea?



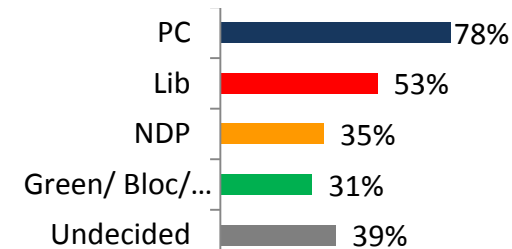
Sample Breakdown ►►

Those who say "good"

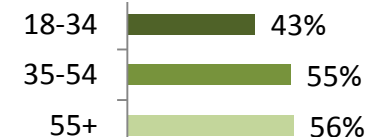
Regional Segmentation



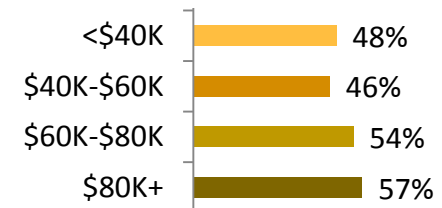
Federal Combined Vote



Age Segmentation



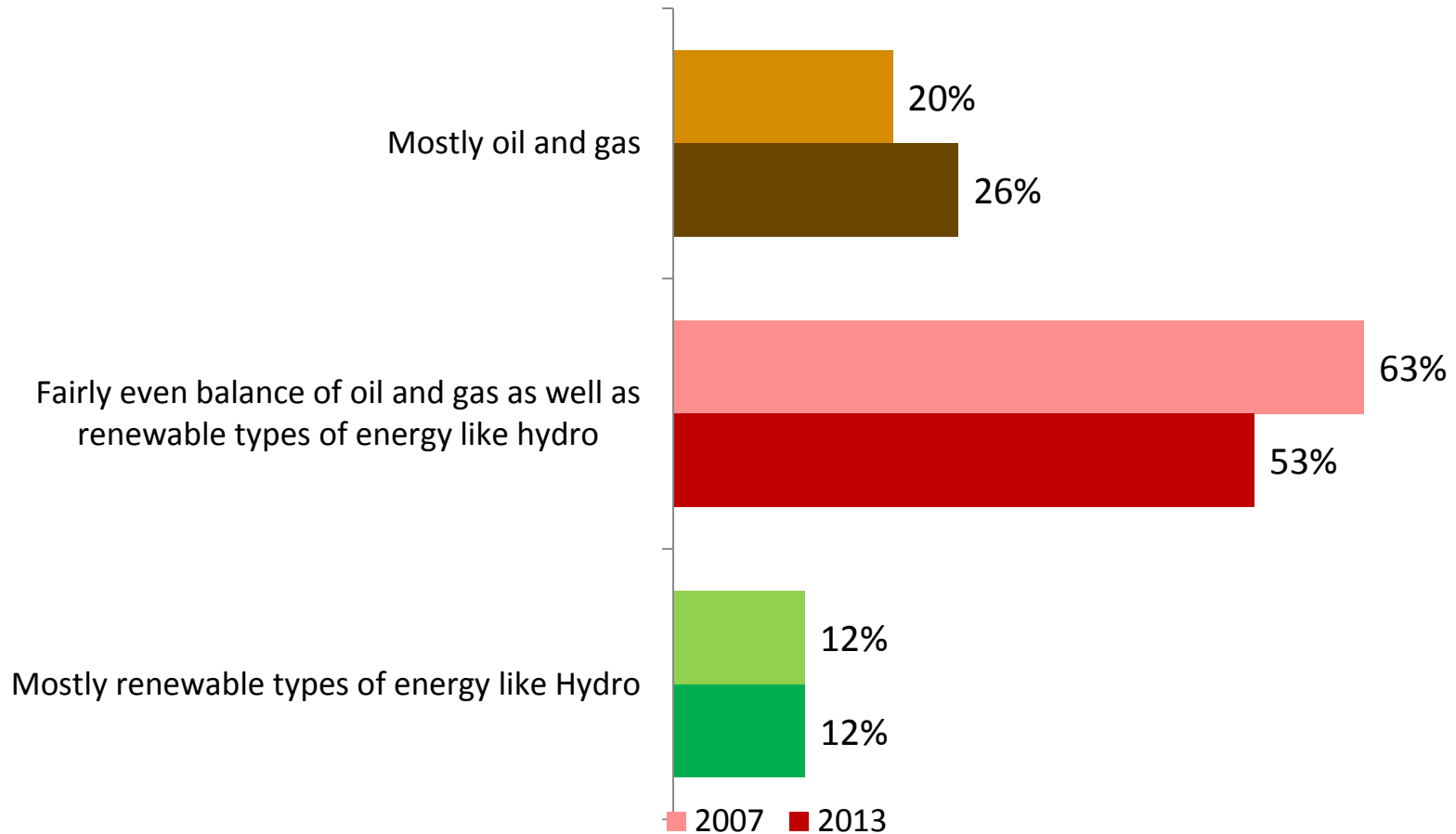
Household Income



Canada's Energy Wealth: Still seen as balanced, but more oil and gas up 6 points

Q

Do you consider Canada's 'energy wealth' primarily as... (Rotate 1 & 2)



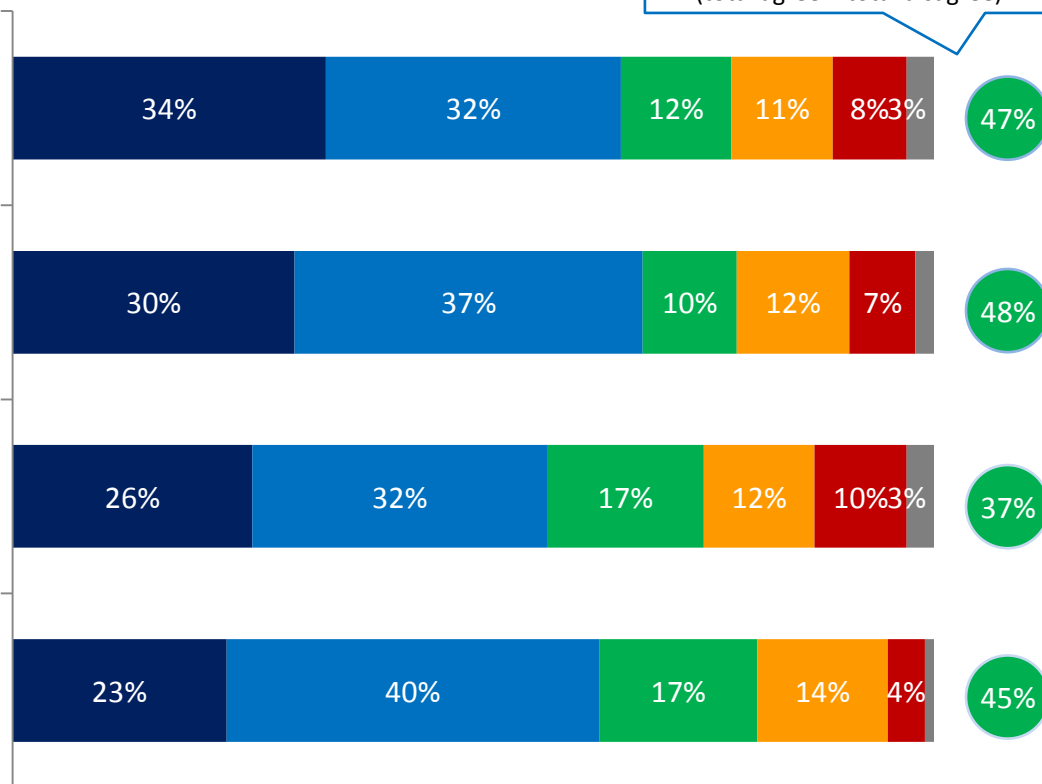
Canadians want to use Canadian oil and gas to protect themselves from world prices

Q

Below are a series of statements people have made about energy. Please tell us if you agree or disagree with each of the following statements:

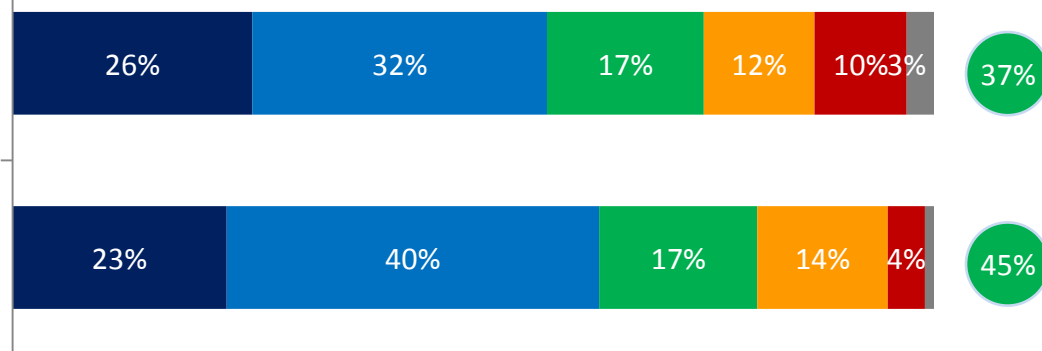
Canada should use our oil and gas resource to protect ourselves from world markets and keep our domestic cost of oil and gas as low as possible.

2007



Just like countries in the Middle East or along the North Sea that have discovered oil and gas, it's our turn to reap the economic benefit of our natural resources.

2007



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

Growing belief Canada too dependent on exports, declining belief we should share resources with US

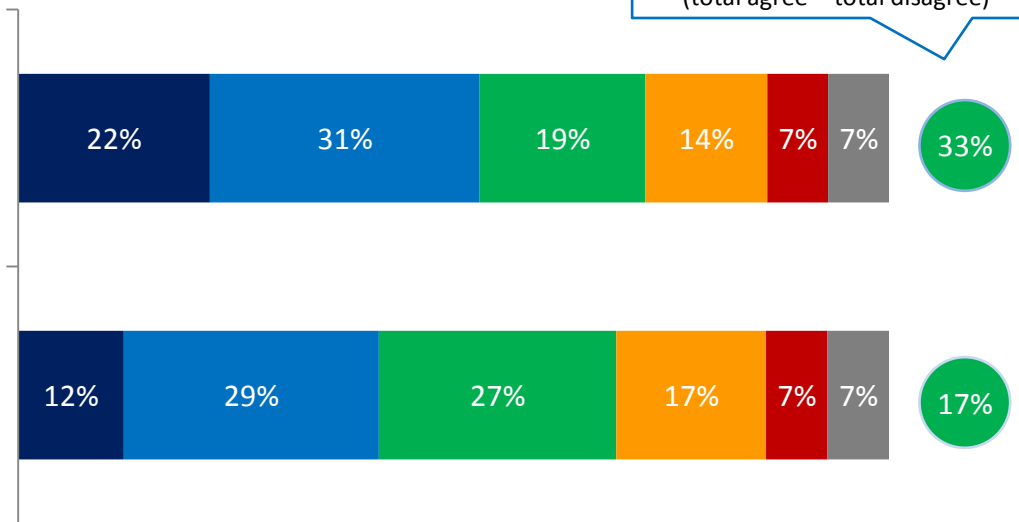
Q

Below are a series of statements people have made about energy. Please tell us if you agree or disagree with each of the following statements:

Canada has become too dependent on money from energy exports.

2007

Net Agreement
(total agree – total disagree)



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

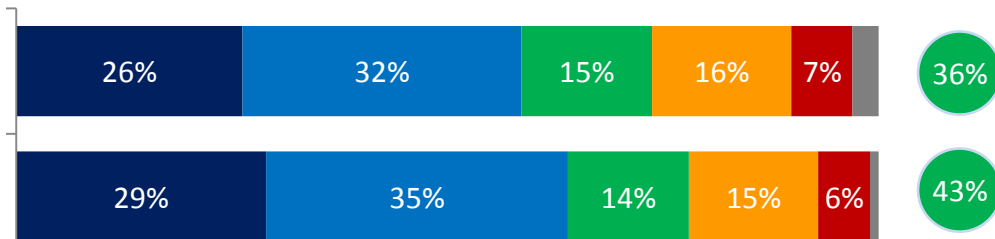
Growing belief Canada too dependent on exports, declining belief we should share resources with US

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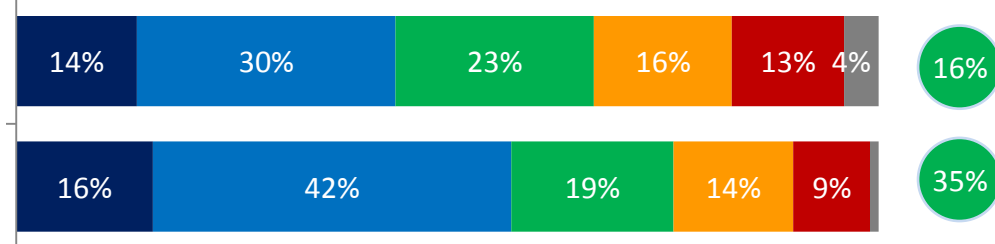
While it might look like we have enough oil and gas for now, we should save it for ourselves to protect future generations of Canadians, and not just sell it to the highest bidder.

2007



In order to preserve our oil and gas reserves for the future rather than selling them now, I am willing to make some sacrifices on my current standard of living.

2007



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

Canadians want to use Canadian oil and gas to protect themselves from world prices

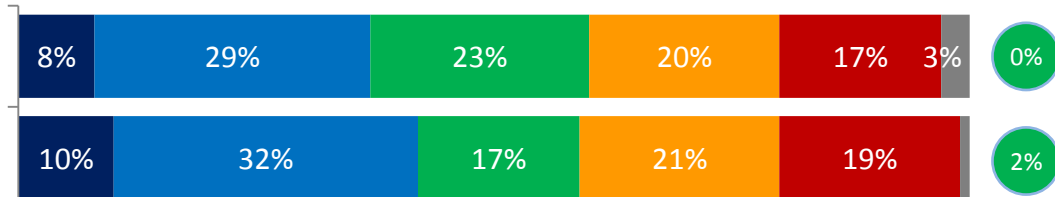
Q

Below are a series of statements people have made about energy. Please tell us if you agree or disagree with each of the following statements:

Net Agreement
(total agree – total disagree)

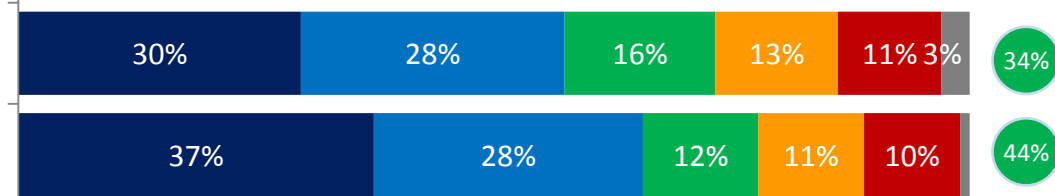
We have a responsibility as a good neighbor to the United States to provide reasonable access to natural resources once our own needs have been met.

2007



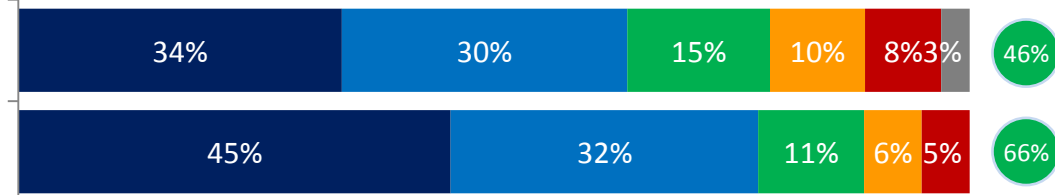
I am not interested in Canada becoming an energy superpower if it really just means becoming a really big supplier of oil and gas for the United States.

2007



We need to protect Canadian natural resources from the insatiable energy appetite of American consumers.

2007



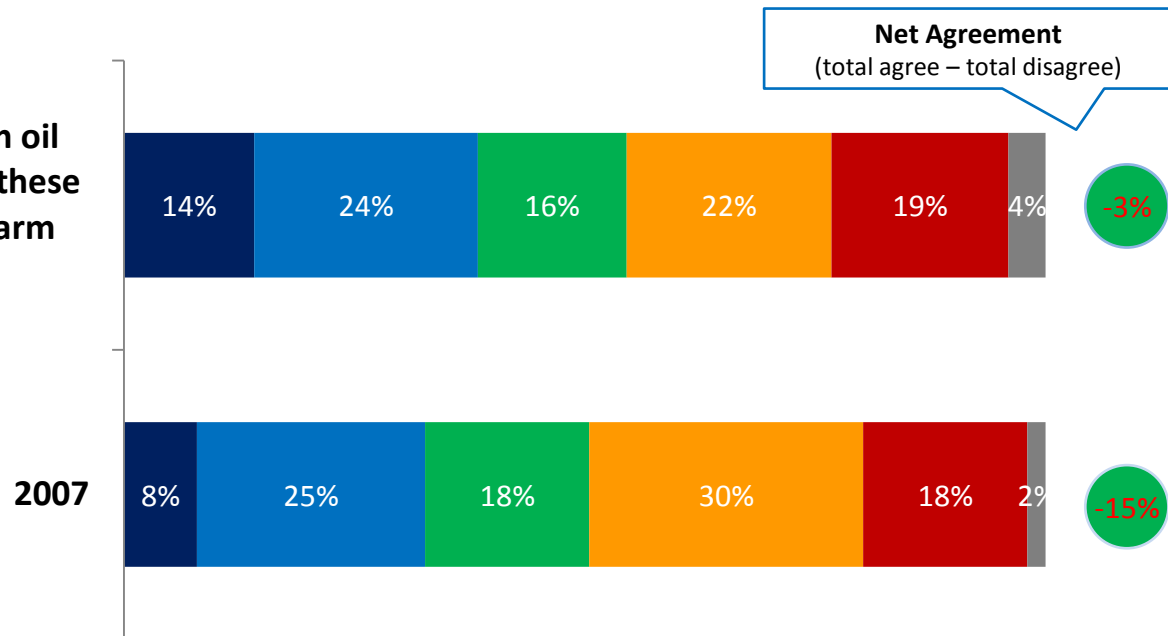
■ Strongly agree
■ Somewhat agree
■ Neither agree nor disagree
■ Somewhat disagree
■ Strongly disagree
■ Don't know

Growing belief Canada too dependent on exports, declining belief we should share resources with US

Q

Below are a series of statements people have made about energy. Please tell us if you agree or disagree with each of the following statements:

Even though Canada can make money from oil and gas production, we should not develop these resources because of the environmental harm they cause.

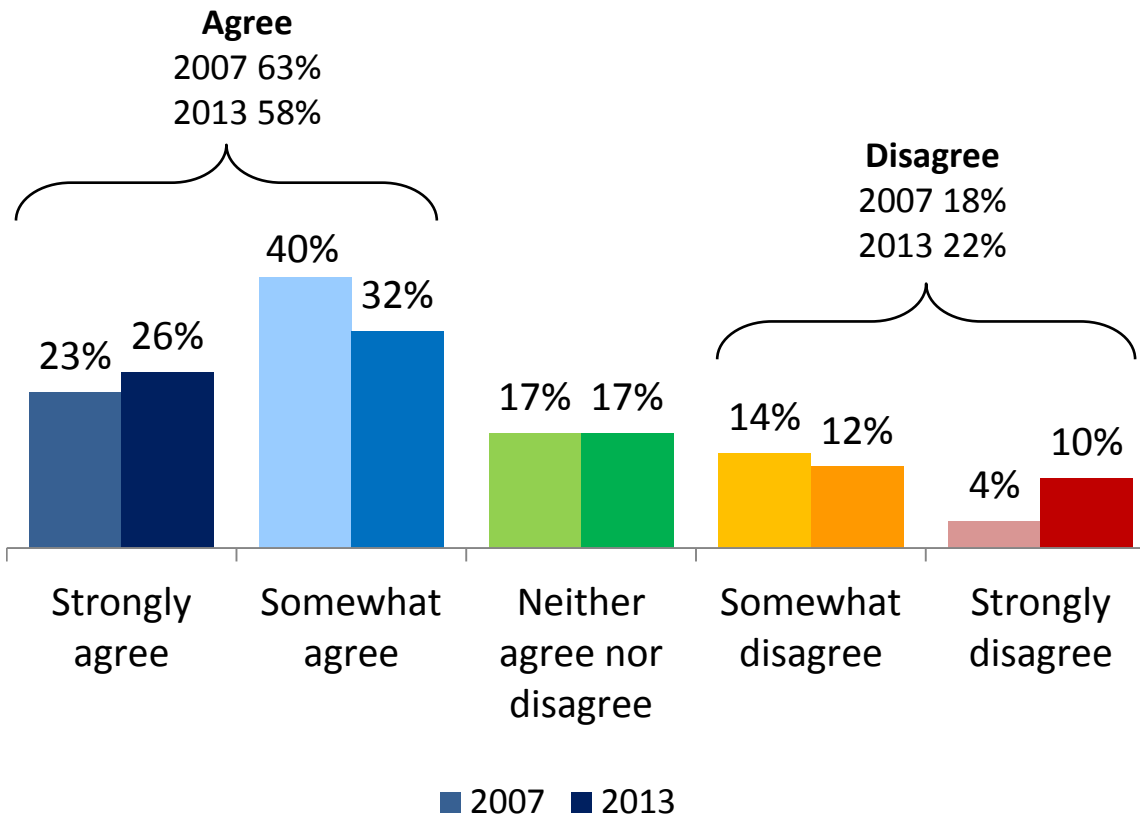


■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

Economic Benefits: By almost 3:1 margin, Canadians agree we should reap benefits of natural resources

Q

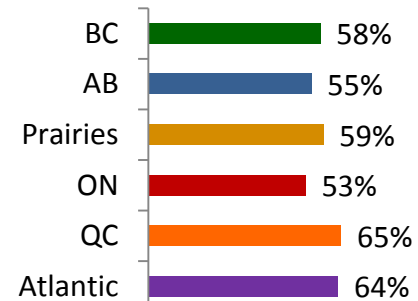
Do you agree or disagree with the following statements: Just like countries in the Middle East or along the North Sea that have discovered oil and gas, it's our turn to reap the economic benefit of our natural resources.



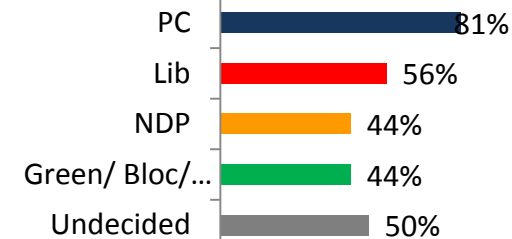
Sample Breakdown ►►

Those who say "Agree"

Regional Segmentation



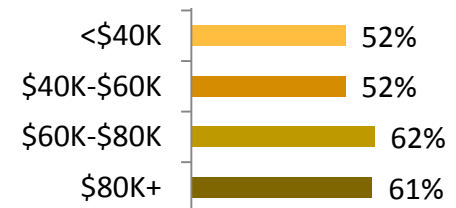
Federal Combined Vote



Age Segmentation



Household Income

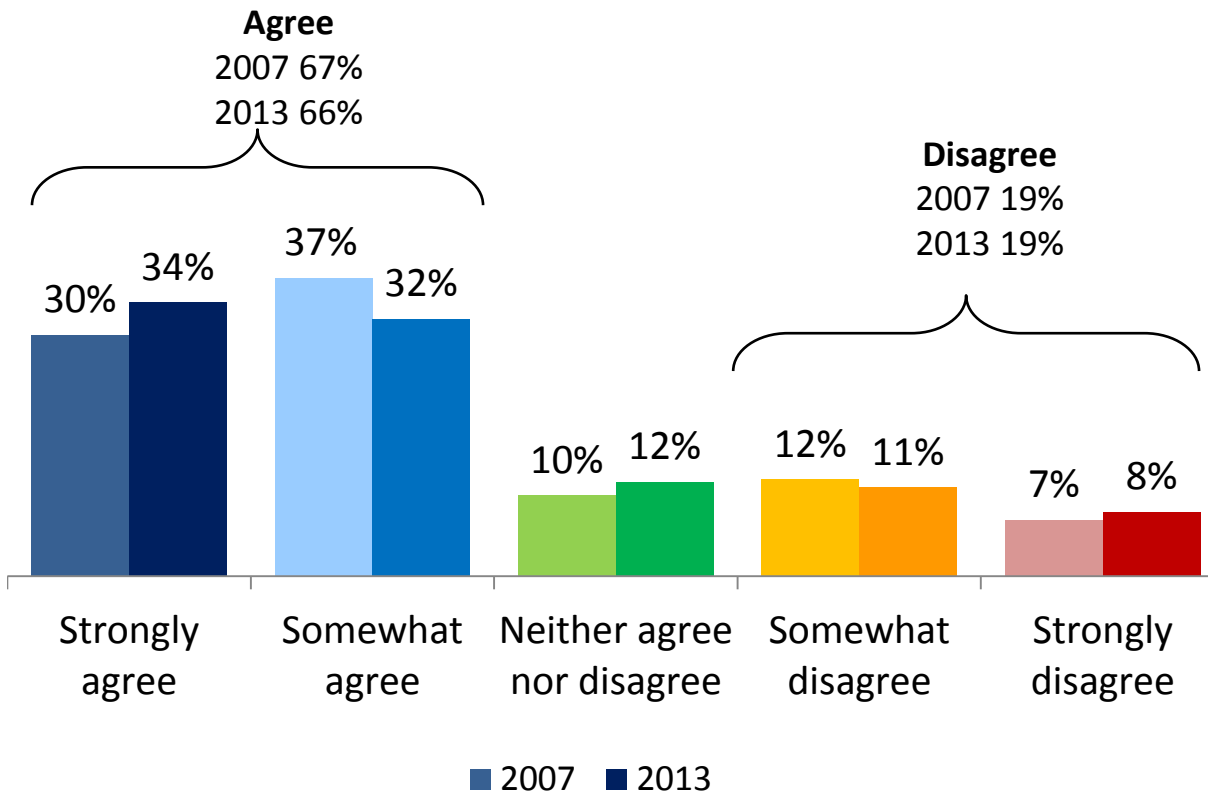


Note: 'Don't Know / Refused' (%) not shown

Economic Protection: Two-thirds have see Canada's oil and gas as a shield against world prices

Q

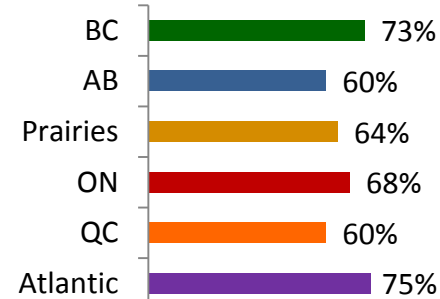
Do you agree or disagree with the following statements: Canada should use our oil and gas resource to protect ourselves from world markets and keep our domestic cost of oil and gas as low as possible.



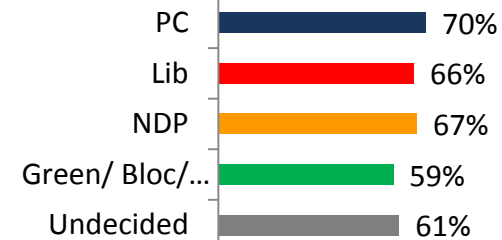
Sample Breakdown ►►

Those who say "Agree"

Regional Segmentation



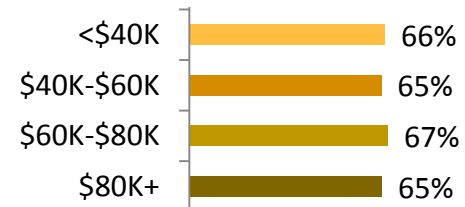
Federal Combined Vote



Age Segmentation



Household Income

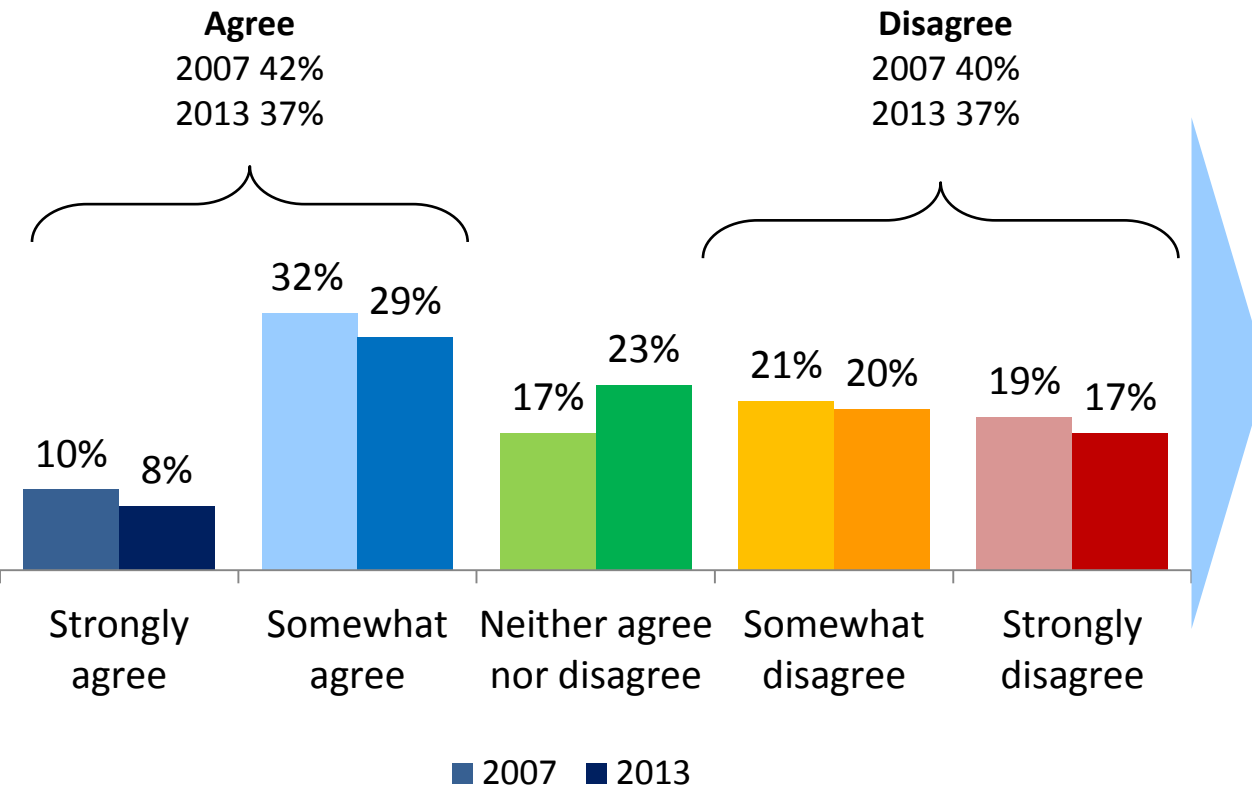


Note: 'Don't Know / Refused' (%) not shown

Good Neighbor: Canadians divided on whether we should provide the US with access to resources as good neighbour

Q

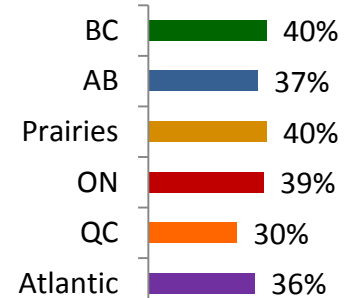
Do you agree or disagree with the following statements: We have a responsibility as a good neighbor to the United States to provide reasonable access to natural resources once our own needs have been met.



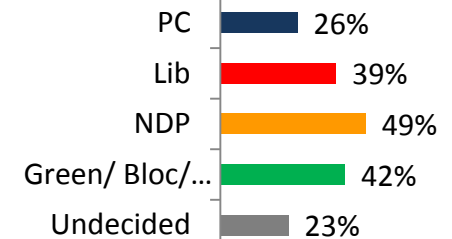
Sample Breakdown ►►

Those who say "Disagree"

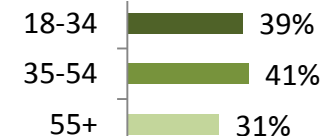
Regional Segmentation



Federal Combined Vote



Age Segmentation



Household Income



Note: 'Don't Know / Refused' (%) not shown

Protect Canadian Natural Resources: Two-thirds agree we have to protect resources from US

16

Q

Do you agree or disagree with the following statements: We need to protect Canadian natural resources from the insatiable energy appetite of American consumers.

Agree

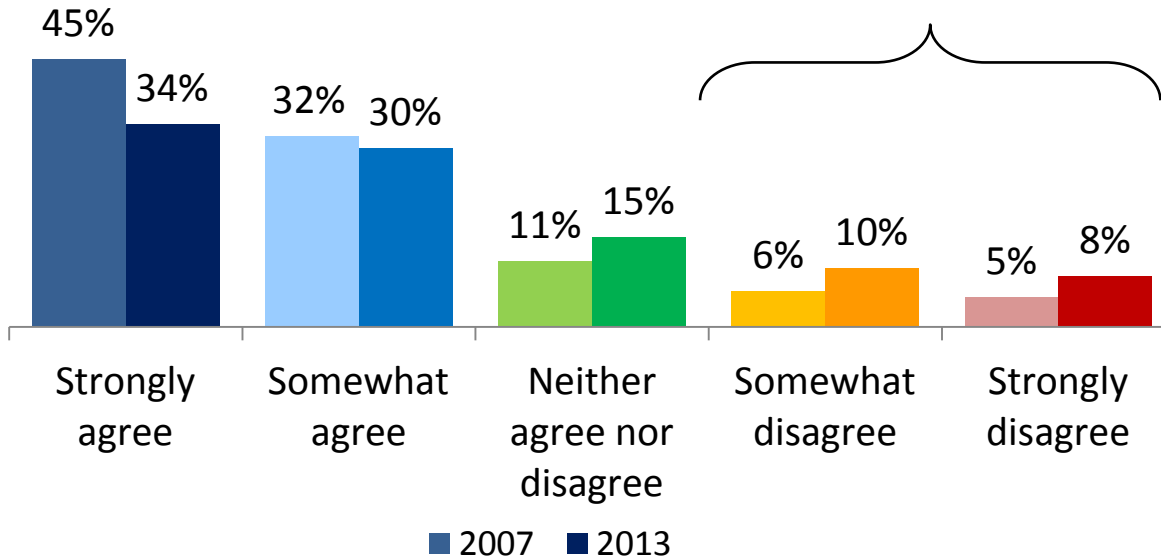
2007 77%

2013 64%

Disagree

2007 11%

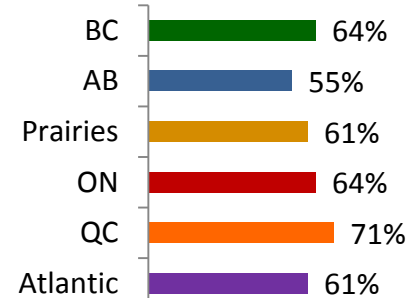
2013 18%



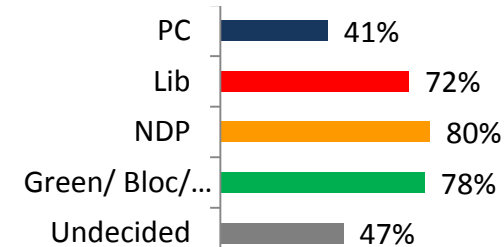
Sample Breakdown ►►

Those who say "Agree"

Regional Segmentation



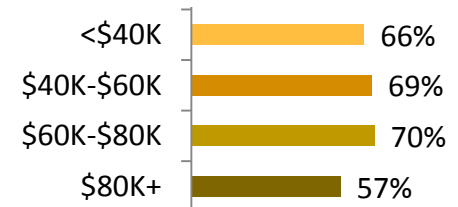
Federal Combined Vote



Age Segmentation



Household Income



Note: 'Don't Know / Refused' (%) not shown

US Energy Supplier: Over half are not interested if “Energy Superpower” just means supplying US

Q

Do you agree or disagree with the following statements: I am not interested in Canada becoming an energy superpower if it really just means becoming a really big supplier of oil and gas for the United States.

Agree

2007 65%

2013 58%

Disagree

2007 21%

2013 24%

37%

30%

28% 28%

12% 16%

11% 13%

10% 11%

Strongly agree

Somewhat agree

Neither agree nor disagree

Somewhat disagree

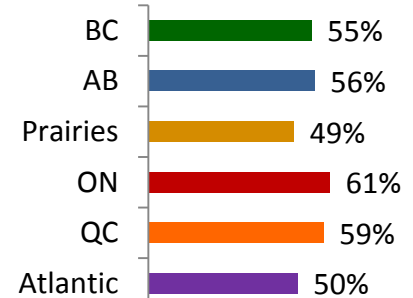
Strongly disagree

■ 2007 ■ 2013

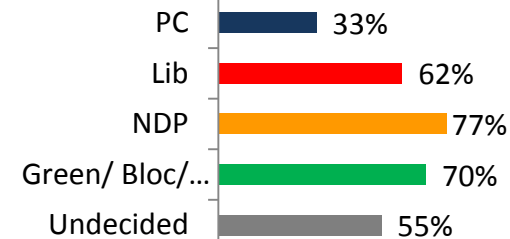
Sample Breakdown ►►

Those who say “Agree”

Regional Segmentation



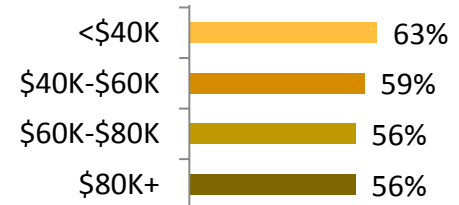
Federal Combined Vote



Age Segmentation



Household Income

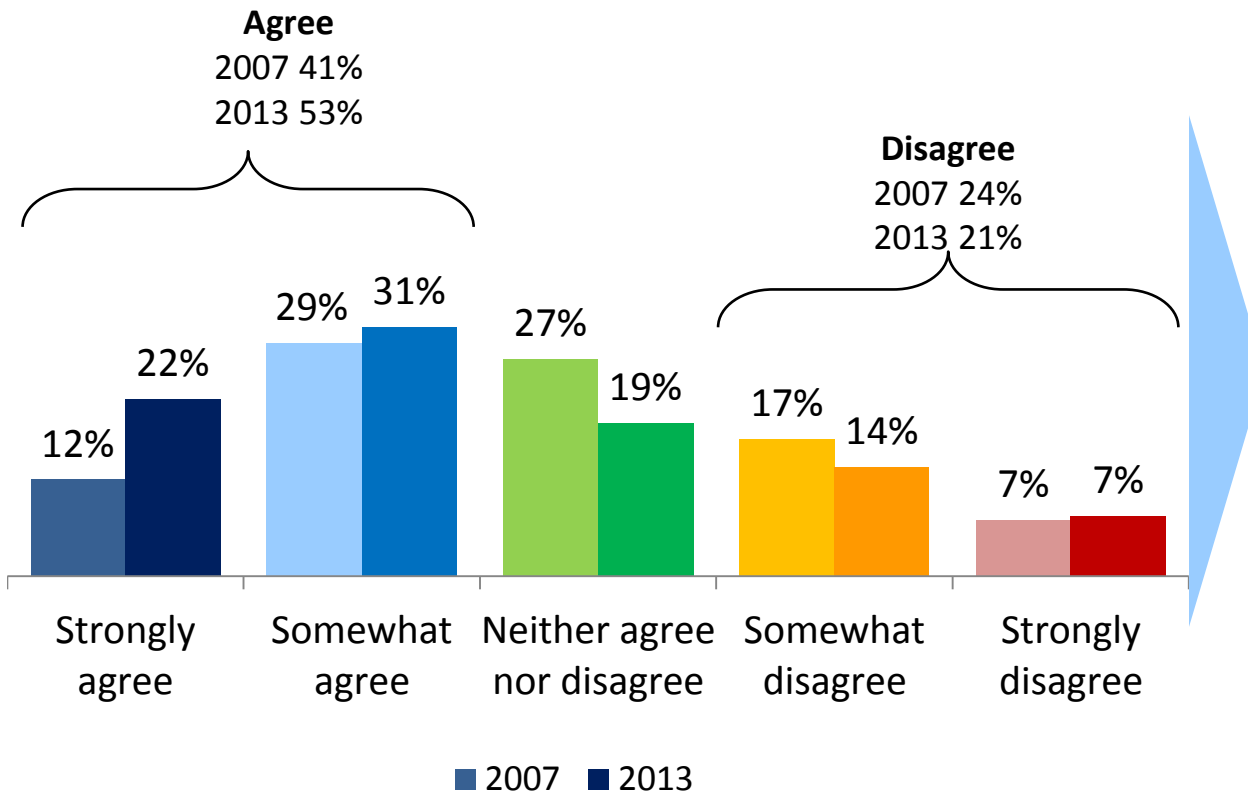


Note: ‘Don’t Know / Refused’ (%) not shown

Energy Exports: Majority agree Canada has become too dependent on energy exports, particularly Albertans, NDP

Q

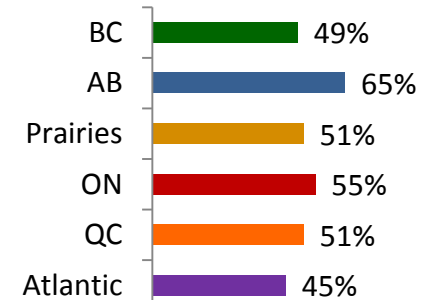
Do you agree or disagree with the following statements:
Canada has become too dependent on money from energy exports.



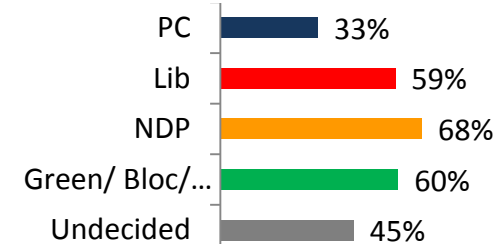
Sample Breakdown ►►

Those who say "Agree"

Regional Segmentation



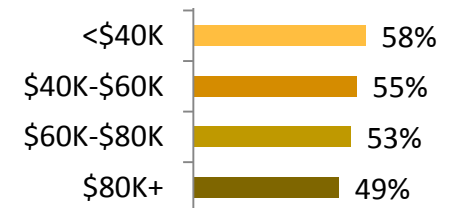
Federal Combined Vote



Age Segmentation



Household Income

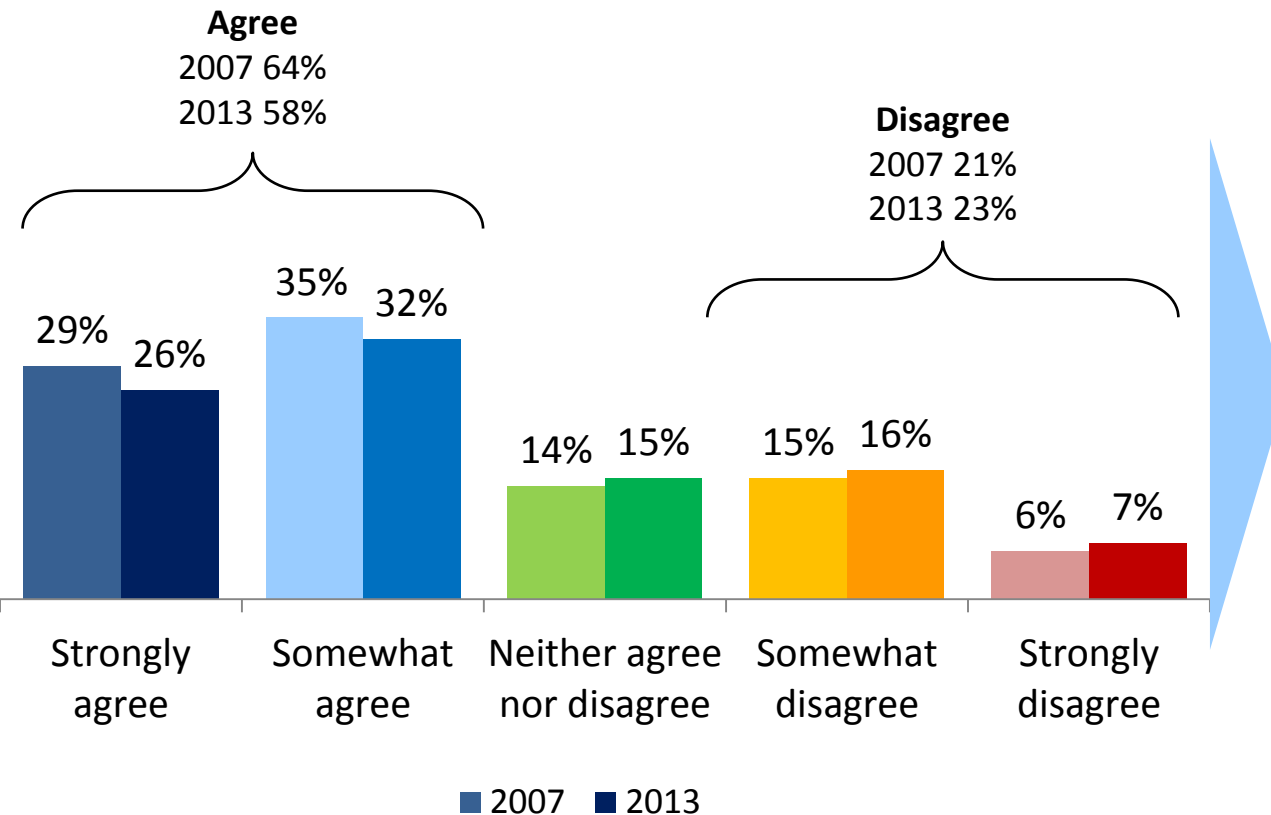


Note: 'Don't Know / Refused' (%) not shown

Saving Energy for the Future: Majority agree we should save energy resources for the future

Q

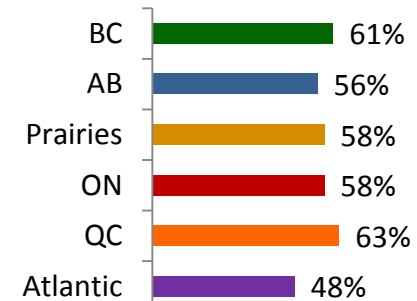
Do you agree or disagree with the following statements: While it might look like we have enough oil and gas for now, we should save it for ourselves to protect future generations of Canadians, and not just sell it to the highest bidder.



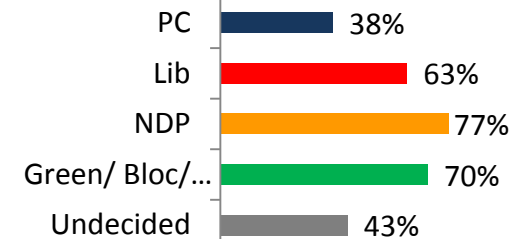
Sample Breakdown ►►

Those who say "Agree"

Regional Segmentation



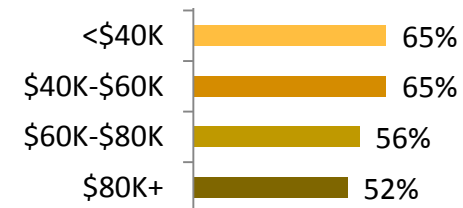
Federal Combined Vote



Age Segmentation



Household Income

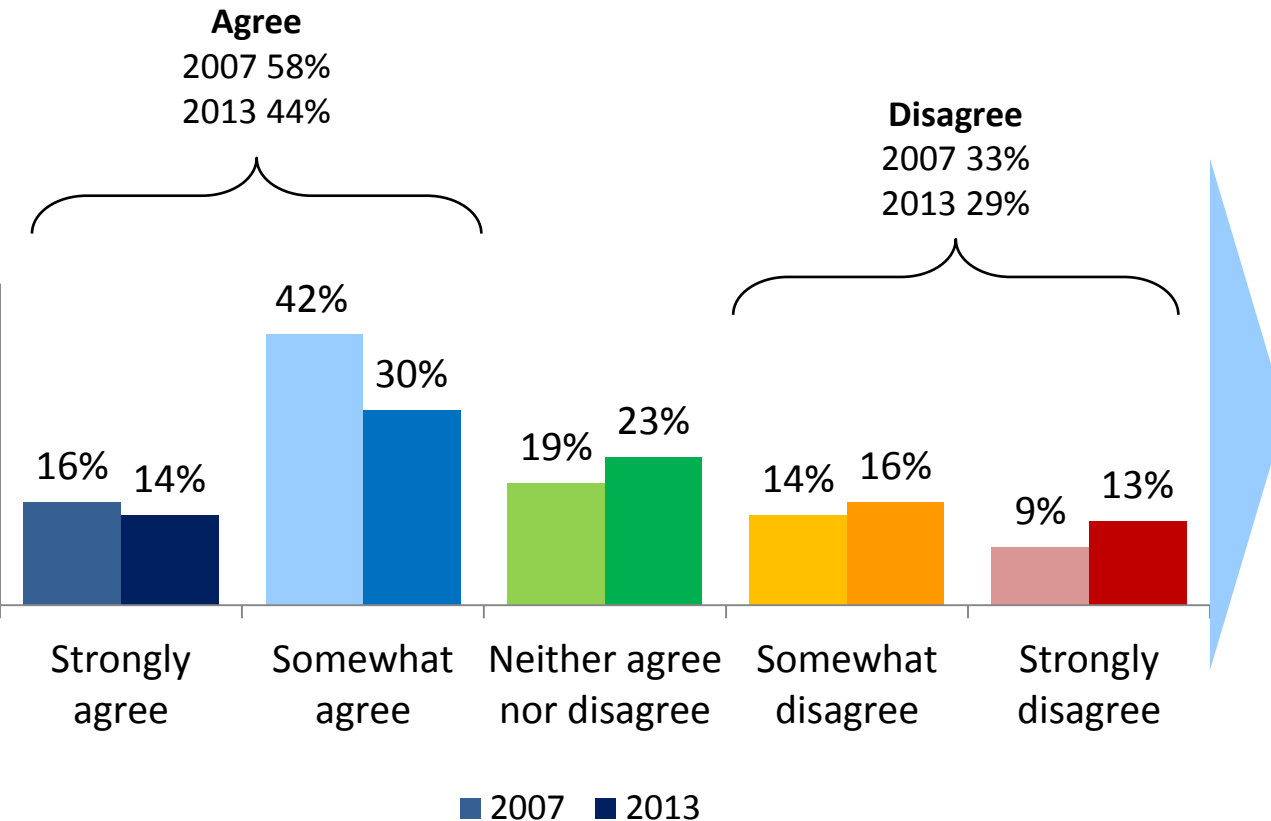


Note: 'Don't Know / Refused' (%) not shown

Sacrifices to Preserve Energy: Less support for saving resources for the future if it means sacrifice today

Q

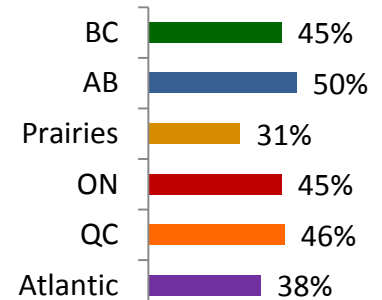
Do you agree or disagree with the following statements: In order to preserve our oil and gas reserves for the future rather than selling them now, I am willing to make some sacrifices on my current standard of living.



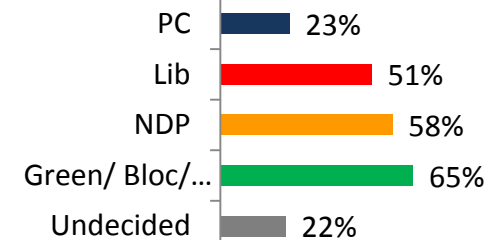
Sample Breakdown ►►

Those who say "Agree"

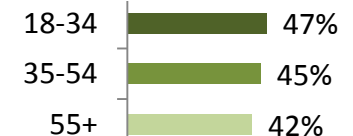
Regional Segmentation



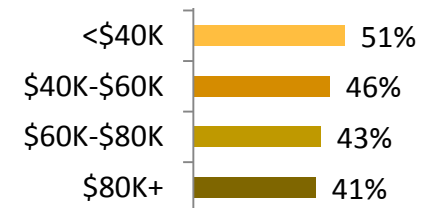
Federal Combined Vote



Age Segmentation



Household Income

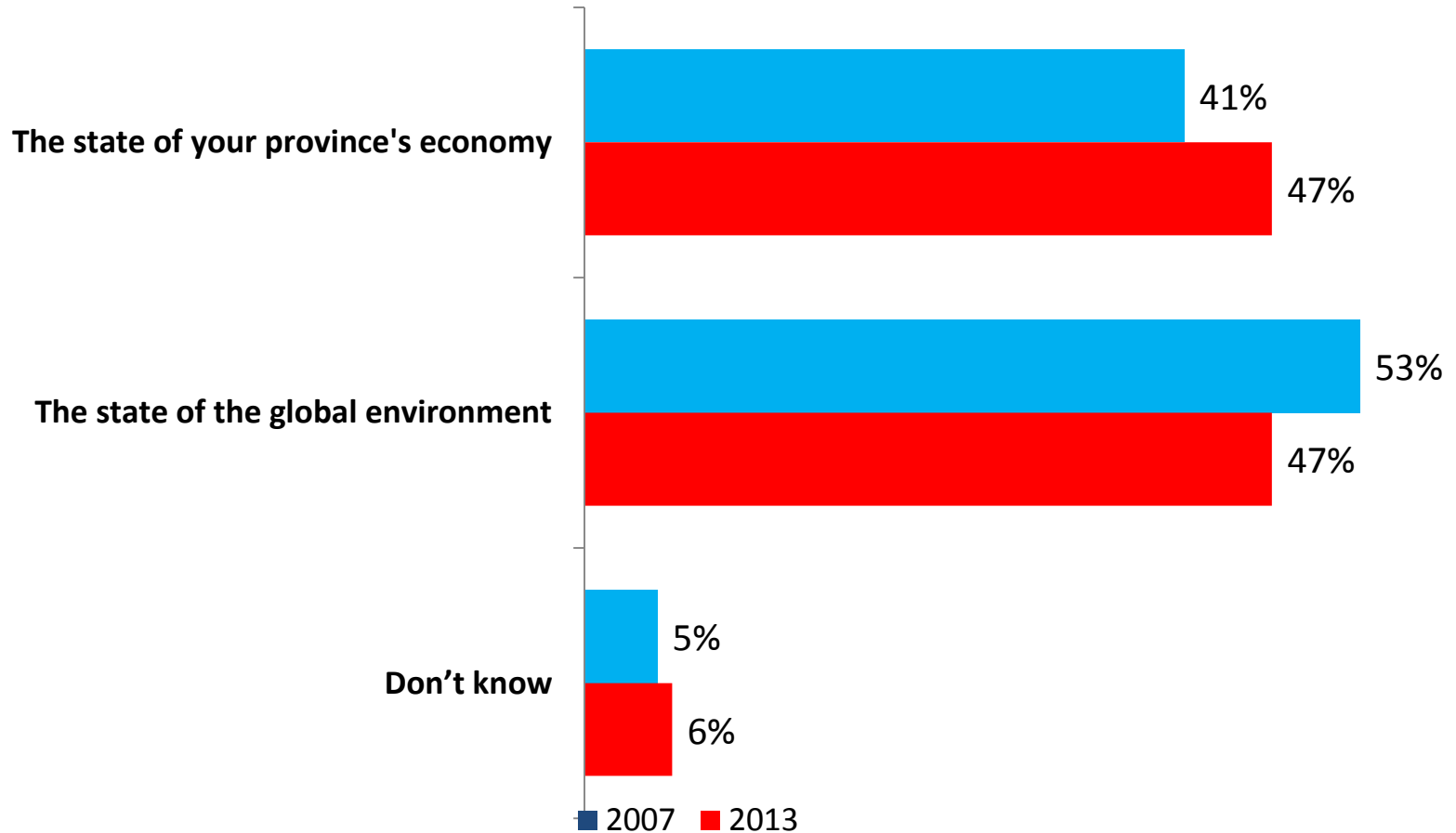


Note: 'Don't Know / Refused' (%) not shown

Prioritizing Energy: Importance of economy growing, now tied with environment

Q

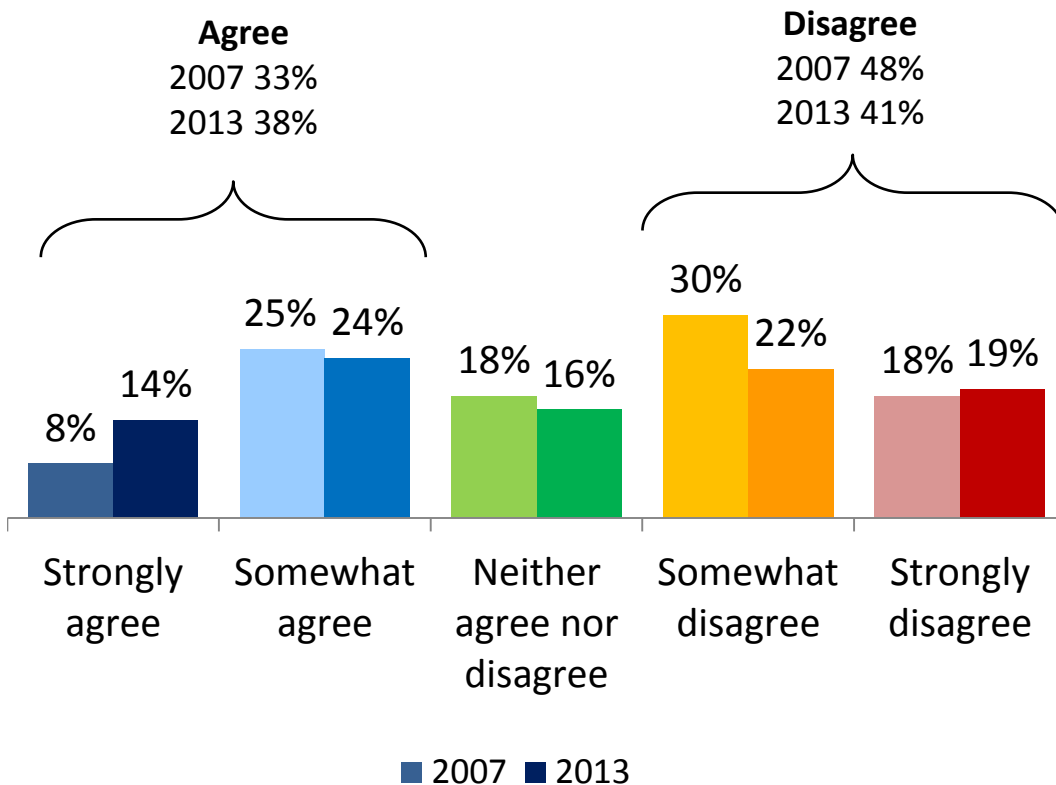
Which is the more important priority for you personally?



Environmental Concerns: Marginally more disagree that we²² should not develop oil because of environmental impact

Q

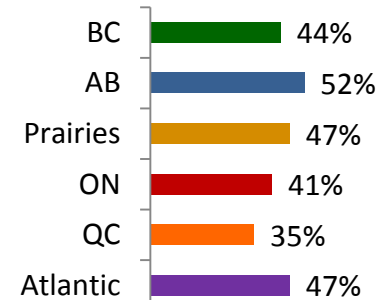
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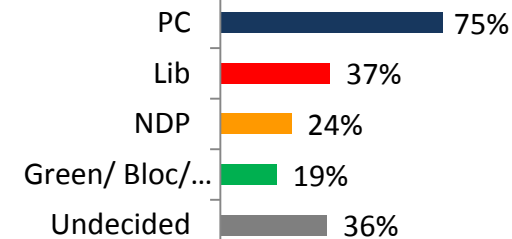
Sample Breakdown ►►

Those who say "Disagree"

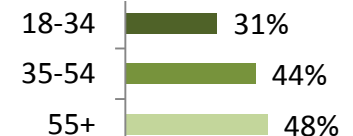
Regional Segmentation



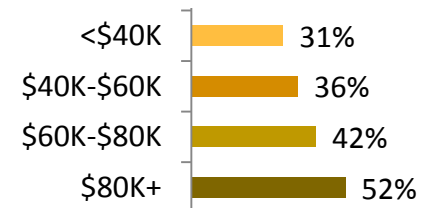
Federal Combined Vote



Age Segmentation



Household Income

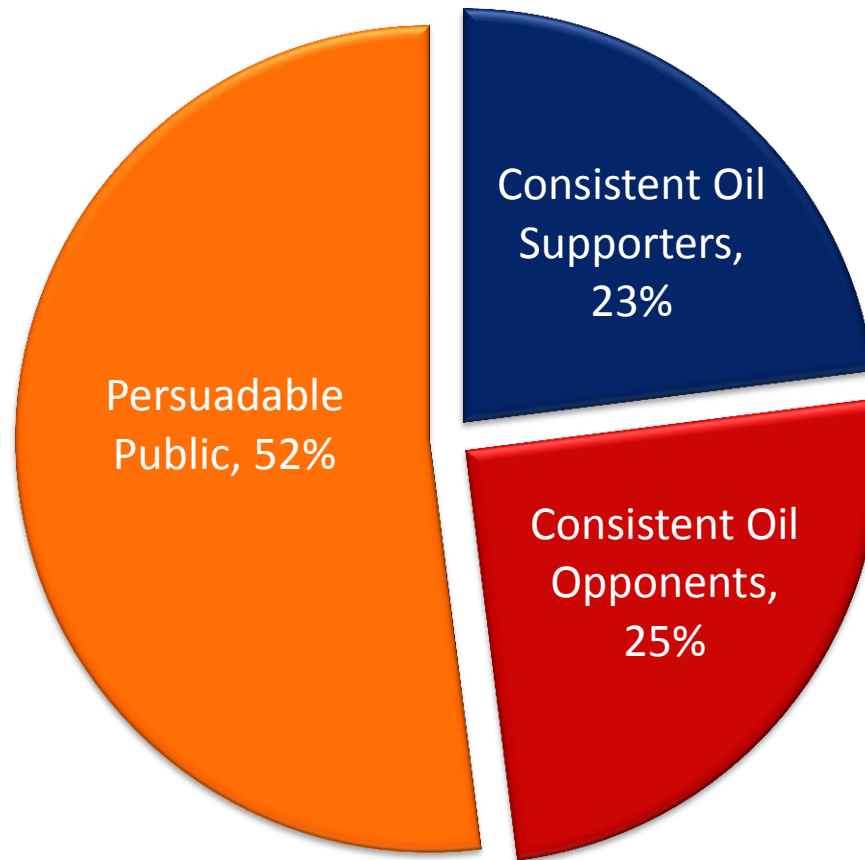


Note: 'Don't Know / Refused' (%) not shown

The Energy Public Opinion Battleground

Just over half of Canadians need to be persuaded if they are to support oil and gas development

24



Value Clusters by key beliefs

	Consistent Oil Supporters	Consistent Oil Opponents	Persuadable Public
Just like countries in the Middle East or along the North Sea have discovered oil & gas, it's our turn to reap the economic benefit of our natural resources	92%	9%	68%
Disagree-Even though Canada can make money from oil and gas production, we shouldn't develop these resources because the environmental harm they cause	93%	2%	40%
Canada has become too dependent on money from energy exports	20%	86%	52%
Canada should use our oil & gas resources to protect ourselves from world markets & keep our domestic cost of oil & gas as low as possible	56%	51%	78%
I am not interested in Canada becoming an energy superpower if it really just means becoming a really big supplier of oil and gas for the United States	7%	97%	62%
We need to protect Canadian natural resources from the insatiable energy appetite of American consumers	19%	90%	71%
While it might look like we have enough oil and gas for now, we should save it for ourselves to protect future generations of Canadians, and not just sell it to the highest bidder	8%	82%	69%
In order to preserve our oil and gas reserves for the future rather than selling them now, I am willing to make some sacrifices on my current standard of living	11%	84%	40%
Disagree-We have a responsibility as a good neighbor to the United States to provide reasonable access to natural resources once our own needs have been met	21%	71%	28%

Value Clusters by demographics

	BC	AB	Prairies	ON	QUE	Atlantic	Male	Female	18-34	35-54	55+
Consistent Oil Supporters	31%	25%	30%	21%	20%	24%	34%	13%	17%	26%	24%
Consistent Oil Opponents	27%	24%	26%	27%	25%	17%	21%	29%	29%	26%	22%
Persuadable Public	42%	51%	44%	52%	55%	59%	45%	58%	54%	48%	54%



Research-based strategic advice.

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