



Canadian Attitudes toward Energy and Pipelines

SURVEY FINDINGS

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1. INTRODUCTION AND METHODOLOGY

CBC commissioned EKOS Research Associates to conduct a survey of Canadians' views on the economy, energy, and the environment. This survey was conducted online using EKOS' probability-based research panel, *Probit*. Our panel offers complete coverage of the Canadian population (i.e., Internet, phone, cell phone), random recruitment (in other words, participants are recruited randomly, they do not opt themselves into our panel), and equal probability sampling. All respondents to our panel are recruited by telephone using random digit dialling and are confirmed by live interviewers. Unlike opt-in online panels, *Probit* supports margin of error estimates.¹

The field dates for this survey are February 16-26, 2016. In total, a random sample of 2,098 Canadian adults aged 18 and over responded to the survey. The margin of error for a survey of this size is +/- 2.1 percentage points, 19 times out of 20.

Please note that the margin of error increases when the results are sub-divided (i.e., error margins for sub-groups such as region, sex, and age). All the data have been statistically weighted by age, gender, and region to ensure the sample's composition reflects that of the actual population of Canada according to Census data.

¹ Baker, Brick et al., '*Report of the AAPOR Task Force on Non-Probability Sampling*', American Association for Public Opinion Research, May 2013

2. OVERVIEW OF FINDINGS

Results reveal that Canadians are torn between a rising environmental ethic and deep anxieties about the economy. While there is strong sympathy for greater regulation and investment in a post carbon future, there is equally broad recognition that our energy resources are a critical ingredient of our economic future. There is also a sense that this will remain important in the future, albeit less so. The relative commitment to the environment or economic priorities is fairly evenly matched across several indicators; however, it is very divided on regional and partisan lines. Alberta and Saskatchewan are much more focused on the economy and the energy industry. British Columbia and Quebec are the most environmentally focused. We also see a huge gap across Conservative supporters and everyone else on most of these questions.

On the specific issue of pipelines, we see some interesting and once again divided views. Most agree that pipelines, while not risk-free, are the safest mode of transporting the oil and gas that will continue to have to move across the country. Quebecers are the least impressed with pipeline safety but they also have the most dire assessment of rail safety in the aftermath Lac-Mégantic. Very few believe that road, rail, or water are particularly safe modes of transporting oil and gas.

In terms of various pipeline projects, there are fairly stable views on whether to support or oppose these projects. These views tend to lean to support, but with significant opposition, particularly in Quebec and British Columbia.

The National Energy Board, as the regulator, does not receive strong confidence from the Canadian public. While trust in various players to develop energy policy is mixed, the federal government does reasonably well (less so in Alberta). Outside of Alberta and Saskatchewan, most believe the provinces should have a say in whether pipelines cross their territory.

All in all, we see a conflicted Canadian public who are trying to reconcile the heightened consensus about the threat of climate change with a clear recognition that energy will remain a critical ingredient of our economy, and that pipelines are the best of a not very appetizing array of choices to move oil and gas. The deepening gloom about the economy may be further confusing what is a divided outlook on these critical issues.

3. DETAILED FINDINGS

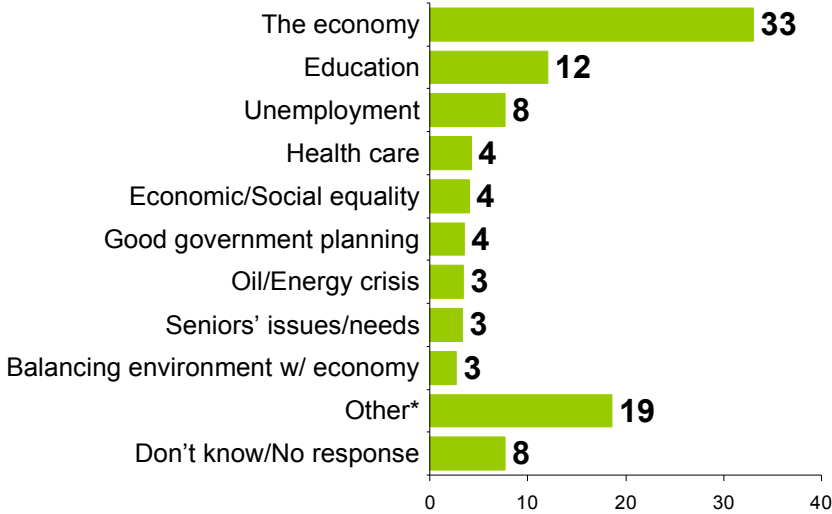
3.1 MOST IMPORTANT ISSUE FACING CANADA

Canadians were first asked, unprompted, to identify the most important issue facing Canada today. The economy was mentioned most often (33 per cent), followed fairly distantly by education (12 per cent) and unemployment (8 per cent).

- Men (35 per cent), those 65 years of age and older (37 per cent), Alberta residents (41 per cent) and higher income earners are particularly likely to see the economy as the most important issue facing Canada.

Most important issue facing Canada

Q. In your opinion, what is the most important issue facing Canada today?



*Options selected less than 3% of the time include: immigration issues (2%), first nations issues (2%), public infrastructure (1%), security/terrorism (1%), and participation in peace keeping efforts (1%).

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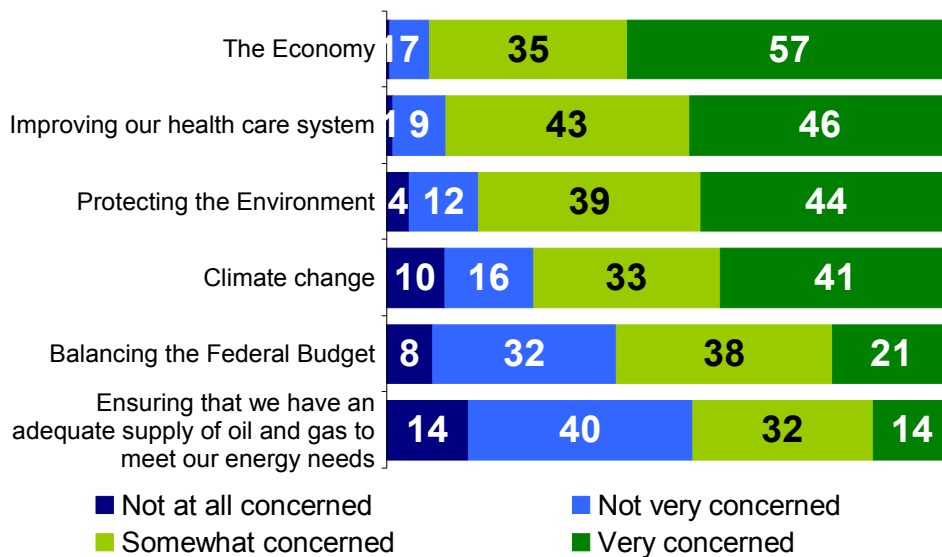
BASE: Canadians; February 16-26, 2016 (n=2,098), MOE +/- 2.1%, 19 times out of 20

3.2 DEEPEST CONCERNS

Canadians were then asked to rate their degree of concern with a number of issues. The economy is seen as the most significant concern (57 per cent say they are very concerned about the economy), followed by improving the health care system (46 per cent very concerned), and protecting the environment (44 per cent very concerned).

Deepest concerns

Q. In general terms, would you say you are very concerned, somewhat concerned, not very or not at all concerned with each of the following issues?



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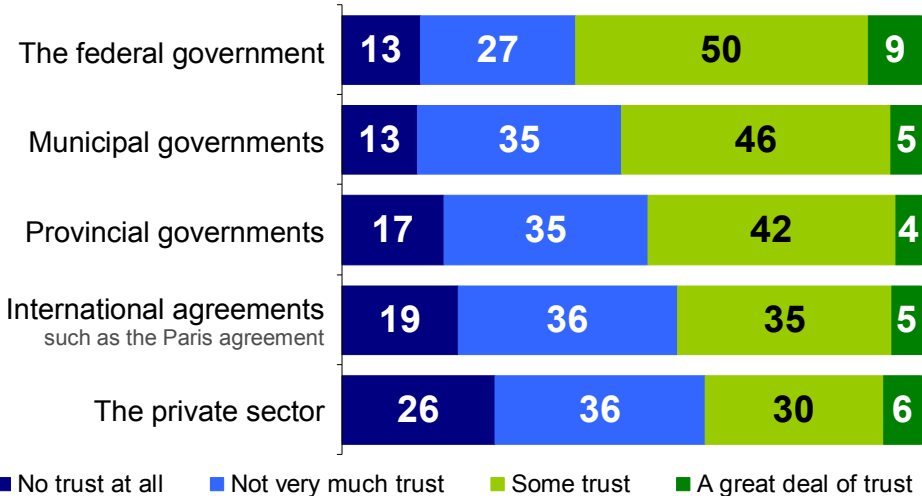
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3.3 TRUST IN VARIOUS PLAYERS IN THE ENERGY SECTOR

When respondents were asked to rate the extent to which they trust a range of players to develop energy policy that benefits all Canadians, results reveal that none of the players examined are seen as particularly trustworthy, although the federal government receives the highest trust ratings: 59 per cent express some (50 per cent) or a great deal of trust (9 per cent). The private sector is seen as least trustworthy (only 36 per cent express some or a great deal of trust).

Trust in various players in the energy sector

Q. Thinking about our energy future, to what extent do you trust each of the following to develop energy policy that benefits all Canadians? Would you say you have a great deal of trust, some trust, not very much trust, or no trust at all?



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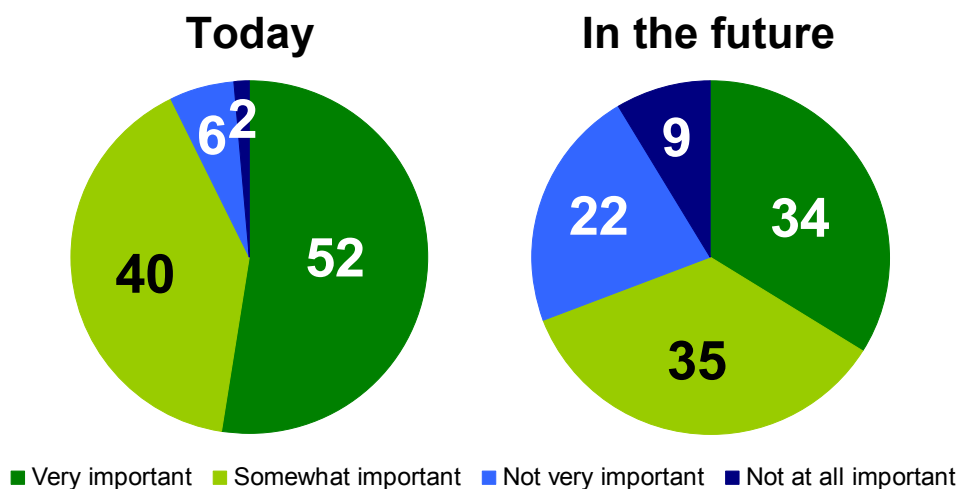
3.4 TRUST IN VARIOUS PLAYERS IN THE ENERGY SECTOR

Canadians were asked how important the oil and gas industry is to Canada's economy, both today and in the future. Results vary considerably depending on whether Canadians are thinking of today or the future. Fully 92 per cent think the oil and gas industry is important to Canada's economy today, while significantly fewer (69 per cent) think it will continue to be important in the future.

- Those 65 years of age and older (94 per cent), Alberta residents (99 per cent), and higher income earners are particularly likely to think the oil and gas industry is important to Canada's economy today.
- Those 65 years of age and older (76 per cent) and Alberta residents (85 per cent) are also most likely to think the oil and gas industry will be important to Canada's economy in the future.

Importance of oil and gas industry

Q. In your opinion, how important is the oil and gas industry to Canada's economy, both today and in the future? Would you say it is very important, somewhat important, not very important or not at all important?



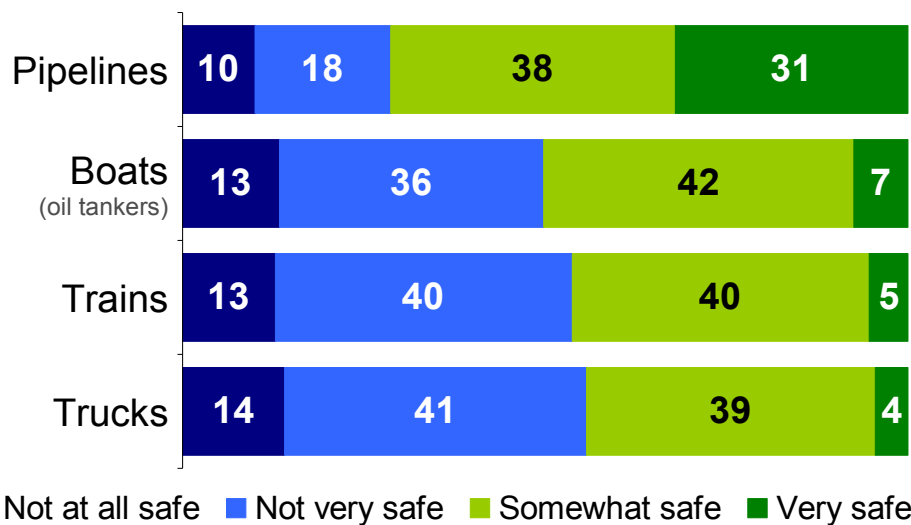
3.5 SAFEST METHOD FOR MOVING OIL

When asked to rate the safety of a number of methods to transport oil long distances, results reveal that pipelines are seen as significantly safer than oil tankers, trains, or trucks.

- Men (78 per cent), older Canadians, Alberta residents (91 per cent), and higher income earners are particularly likely to feel pipelines are the safest method to transport oil long distances.
- Quebec residents are the least impressed with train safety (70 per cent say not very safe or not at all safe, compared to 53 per cent on average).

Perceived safety of methods for moving oil

Q. How safe do you think each of the following are to transport oil long distances?
Would you say very safe, somewhat safe, not very safe, or not at all safe?



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3.6 ATTITUDES TO ENERGY VERSUS THE ENVIRONMENT

Canadians were also asked a number of attitudinal questions about energy, the environment, and the economy.

Results reveal strong support for the idea that there needs to be stricter laws and regulations to protect the environment (79 per cent agree with this idea). Agreement is particularly strong among women (82 per cent) and lower income earners.

There is also strong agreement that Canada should do more to support the development of a clean energy and clean technology industry even if it results in an increase in energy costs (76 per cent agree with this idea, and only 22 per cent disagree). Agreement is particularly strong among those under 35 years of age (81 per cent), and B.C. residents (84 per cent).

Similarly strong support is expressed for the idea that governments should take necessary action to protect the environment, even if such action could result in an increase of energy costs and hurts some industries (72 per cent agree, and only 27 per cent disagree). Support for this idea is strongest among women (75 per cent), those under 35 years of age (78 per cent), British Columbia residents (78 per cent), and lower income earners.

Despite strong agreement with the ideas above, results are more mixed when Canadians are asked whether they are more concerned about the economy or environmental issues: just over half (55 per cent) agree that they are more worried about economic issues than environmental issues. Mixed views are also expressed in terms of agreement with the idea that no new oil and gas pipelines should be built in Canada (even if this hurts the economy): 40 per cent agree with this idea and 56 per cent disagree.

Attitudes to energy vs. the environment

Q. Would you say you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements?

“There need to be stricter laws and regulations to protect the environment”



“Canada should do more to support the development of a clean energy and clean technology industry even if it results in an increase in energy costs”



“Governments should take necessary action to protect the environment, even if such action could result in an increase of energy costs and hurts some industries”



“Right now I am more worried about economic issues than environmental issues”



“No new oil and gas pipelines should be built in Canada, even if this hurts the economy”



■ Strongly disagree
 ■ Somewhat disagree
 ■ Somewhat agree
 ■ Strongly agree

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3.7 ATTITUDES TO SUPPORT FOR ENERGY SECTOR

Recognizing the ripple effects that the slump in oil prices has had on Canada's economy, Canadians were asked about their attitudes to giving aid to Canada's energy sector and Alberta itself. Fully seventy per cent agree that that Canada's energy resources should be supported by the federal government (including 32 per cent who 'strongly' agree), compared to just 28 per cent who disagree. Similarly, six in ten (59 per cent) agree that Alberta is in need of federal government aid (including 21 per cent who 'strongly' agree), compared to 37 per cent who disagree.

- Not surprisingly, residents of Alberta are more agreeable to the notion of federal support for both Canada's energy resources (88 per cent, compared to 70 per cent on average) and Alberta itself (91 per cent, compared to 59 per cent on average).
- Conservative voters are much more amenable to federal aid, particularly when compared to NDP supporters. Fully 90 per cent support giving help to the energy sector (compared to 58 per cent of NDP supporters) and 76 per cent agree that Alberta is in need of assistance (compared to 53 per cent of NDP supporters).

Attitudes to support for energy sector

Q. Would you say you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements?

“Canada's energy resources contribute significantly to our national economy and should be supported by the federal government”



“Alberta is having a tough time because of slumping oil prices and needs federal government help now”



■ Strongly disagree ■ Somewhat disagree ■ Somewhat agree ■ Strongly agree

3.8 SUPPORT FOR AIDING ALBERTA

Canadians were given a brief description of two initiatives – one confirmed and one under consideration – intended to help Albertans and asked to rate the extent to which they support or oppose each one. Results reveal fairly broad support for both measures. Six in ten Canadians (63 per cent) say they support the additional \$700 million in spending earmarked for Alberta’s infrastructure (compared to 33 per cent who stand in opposition). A similar proportion, 56 per cent, says they support removing restrictions on employment insurance for Albertans who are out of work (compared to 34 who oppose this measure).

- Not surprisingly, support for additional infrastructure spending is highest in Alberta and Saskatchewan (94 per cent and 78 per cent, respectively, compared to 63 per cent on average). Albertans are also more supportive of E.I. reforms (81 per cent, compared to 56 per cent on average).
- Support for both measures seems to rise progressively with age. For example, 62 per cent of seniors (i.e., those ages 65 and over) support the proposed E.I. reforms, compared to 50 per cent of those under 35 years of age.
- Interestingly, Conservative supporters are most supportive of the Liberals government’s plan for allocating \$700 million to improving Alberta’s infrastructure (76 per cent, compared to 63 per cent on average).

Support for aiding Alberta

Support for additional infrastructure spending

As you may know, Alberta will get more than \$700 million in federal infrastructure money in the coming months to spur its economy which has been weakened by low energy prices. Do you support or oppose this idea?



Support for E.I. reforms

The federal government is considering removing restrictions on employment insurance for out of work Albertans. Do you support or oppose this idea?



- DK/NR
- Strongly support
- Somewhat support
- Somewhat support
- Strongly support

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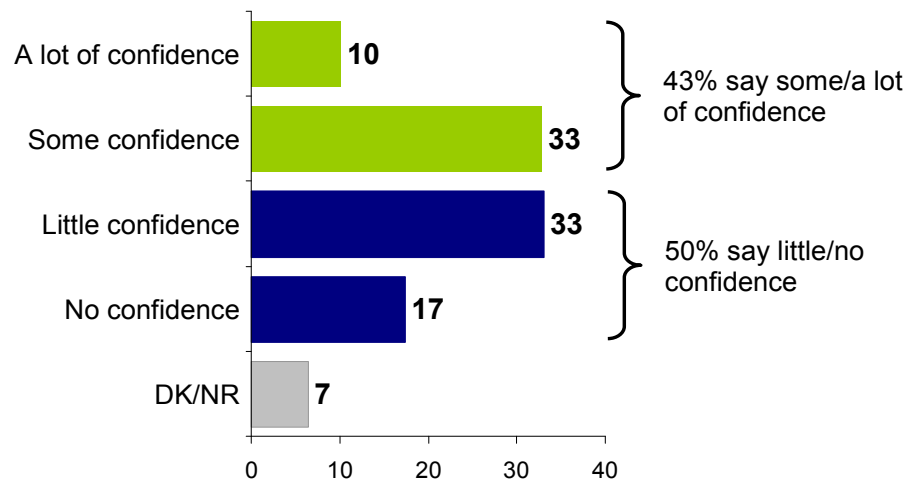
3.9 CONFIDENCE IN NATIONAL ENERGY BOARD

Respondents were provided with a brief description of the National Energy Board and asked to rate their confidence in the process under which pipelines are approved and regulated. Results reveal mixed to negative impressions of the board. Just one in ten Canadians (10 per cent) express a great deal of confidence, while one-third say they have 'some' confidence (33 per cent) or a 'little' confidence (33 per cent). One in six (17 per cent) have no confidence at all.

- Regionally, residents of Alberta are more likely to express confidence in the National Energy Board (57 per cent say they have some to a lot of confidence, compared to 43 per cent on average). In contrast, residents of Quebec and British Columbia are more likely to say they have little to no confidence (60 and 59 per cent, respectively, compared to 50 per cent on average).

Confidence in National Energy Board

Q. The National Energy Board is responsible for regulating the construction and operation of pipelines that cross international borders and provincial boundaries. In general, would you say that you have a lot of confidence, some confidence, little confidence or no confidence in how Canada approves and regulates pipelines to carry oil and gas across the country?



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3.10 SUPPORT FOR VARIOUS PIPELINE PROJECTS

Respondents were provided with a brief description of three proposed pipelines and pipeline expansions – Energy East, the Enbridge Northern Gateway Pipeline, and the Trans Mountain Pipeline. Results show Energy East as a clear favourite, with 59 per cent of Canadians expressing support for the project (compared to 35 per cent who stand in opposition). Attitudes to the Enbridge Northern Gateway Pipeline and the Trans Mountain Pipeline are much more mixed, with narrow pluralities approving of each (48 per cent and 47 per cent, respectively).

- Regionally, residents of Alberta and Saskatchewan are consistently more supportive of all the pipelines proposals tested. For example, 91 per cent of Alberta residents and 75 per cent of Saskatchewan residents support Energy East, compared to 59 per cent on average. In a stark contrast, residents of Quebec are strongly opposed to all three pipeline plans. Residents of British Columbia firmly reject the Northern Gateway and Trans Mountain proposals (60 per cent and 57 per cent oppose these options, respectively), but they express support for Energy East (55 per cent, compared to 38 per cent who oppose the project).
- Those under the age of 35 are consistently more likely to oppose these proposals, while those ages 65 and over are consistently more supportive.
- Support for all three pipeline proposals consistently rises with income. For example, just 45 per cent of those with an annual household income of less than \$35,000 support Energy East, compared to 69 per cent of those earning \$150,000 or more.
- All three proposals enjoy broad support among Conservative supporters, while they face consistent opposition in the NDP ranks. Liberal voters are widely supportive of the Energy East Pipeline, but pluralities oppose both the Enbridge Northern Gateway Pipeline and the Trans Mountain Pipeline.

Tracking reveals that support for Energy East is relatively stable (59 per cent of Canadians express some form of support, up insignificantly from 57 per cent in May 2015). Support for the Enbridge Northern Gateway Pipeline is similarly stable (48 per cent say support, compared to 46 per cent in 2012).

Support for various pipeline projects

Q. Based on what you know, do you support or oppose the building of this pipeline?

Energy East

As you may have heard, the Energy East pipeline is a proposed pipeline that would deliver oil from Alberta and Saskatchewan to refineries and port terminals in Quebec and New Brunswick. Do you support or oppose the building of this pipeline?



Enbridge Northern Gateway Pipeline

The Enbridge Northern Gateway Pipelines Project is a proposed pipeline that would export crude oil from Alberta to the west. From what you know, do you support or oppose the building of this pipeline?



Trans Mountain Pipeline

As you may have heard, there is a proposal to expand the Trans Mountain pipeline from Edmonton to the B.C. coast. Do you support or oppose this idea?



DK/NR Strongly oppose Somewhat oppose Somewhat support Strongly support

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Support for Energy East

Q. As you may have heard, the Energy East pipeline is a proposed pipeline that would deliver oil from Alberta and Saskatchewan to refineries and port terminals in Quebec and New Brunswick. Do you support or oppose the building of this pipeline?:

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May 2015



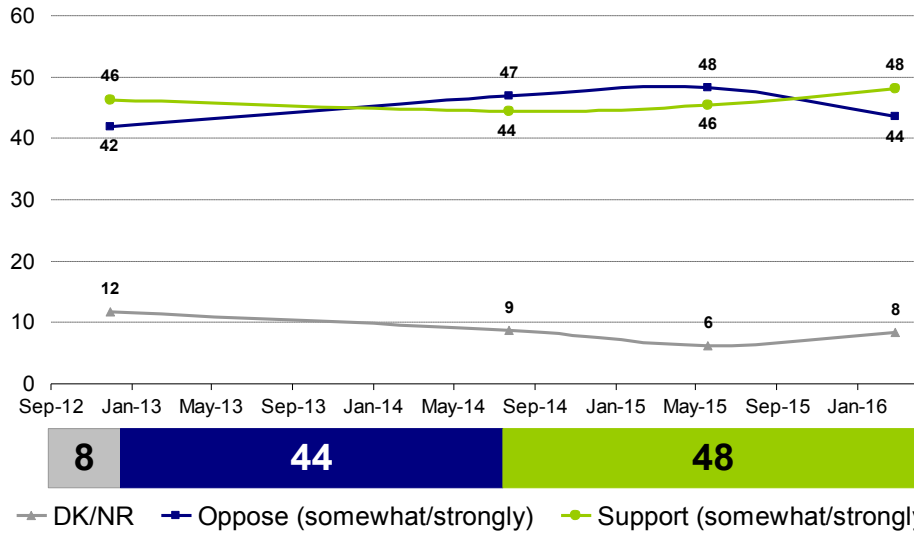
BASE: Canadians; May 12-19, 2015 (n=2,331), MOE +/- 2.0%, 19 times out of 20

DK/NR
 Strongly oppose
 Somewhat oppose
 Somewhat support
 Strongly support

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Support for Enbridge Northern Gateway Pipeline

Q. Canada is facing a series of difficult challenges. Thinking not just of today but over the next five years, what priority should the federal government place on each of the following areas?



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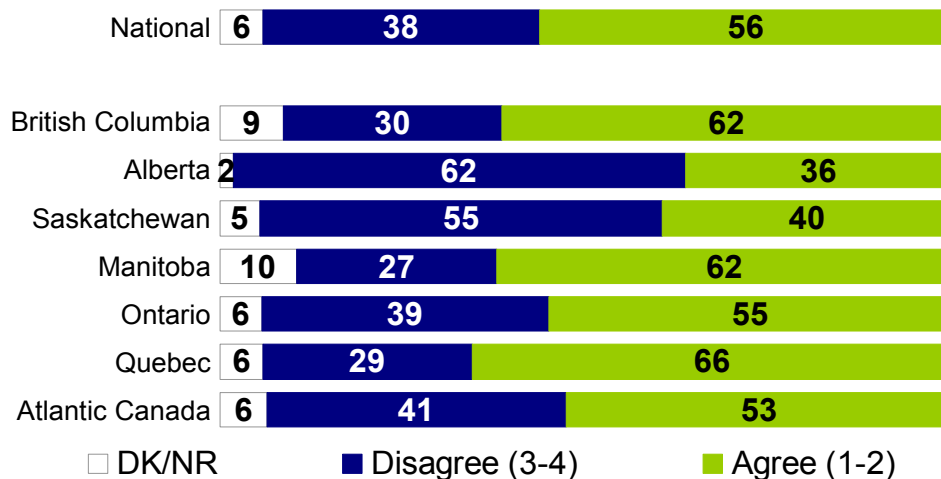
3.11 SUPPORT FOR EMPOWERING PROVINCES IN PIPELINE DECISIONS

Respondents were given a brief explanation of how some Quebec politicians have expressed their opposition to Energy East and then asked to rate the extent to which they agree or disagree that provinces should have more influence in decisions affecting the pipelines that run through their respective provinces. Just over half of Canadians (56 per cent) agree that provinces should have more power, while two-fifths (38 per cent) disagree with this idea.

- Results reveal stark regional differences on this issue. Not surprisingly, majorities of Alberta and Saskatchewan residents, perhaps frustrated with the opposition oil companies have faced in British Columbia and now Quebec, oppose giving the provinces further power in matters related to pipelines (62 per cent and 55 per cent, respectively, compared to 38 per cent on average). On the other end of the spectrum, residents of Quebec and British Columbia are the most supportive of empowering the provinces (66 per cent and 62 per cent, respectively, compared to 56 per cent on average).
- Those under the age of 35 are more supportive of giving the provinces more say (67 per cent) when compared to those ages 65 and older (51 per cent).
- Conservative supporters are much more strongly opposed to giving the provinces more authority over pipeline projects (72 per cent, compared to 35 per cent of Liberal supporters and 20 per cent of NDP voters).

Empowering provinces in pipeline decisions

Q. Some Quebec politicians oppose the proposed pipeline that would carry Alberta oil through Quebec to an export terminal in Saint John New Brunswick. To what extent do you agree or disagree that provincial governments should have influence over pipelines going through their provinces, even if it hurts the economies of other provinces?



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■ Disagree (3-4)

■ Agree (1-2)

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3.12 EXPANDING OIL PRODUCTION VERSUS GREEN ENERGY INVESTMENTS

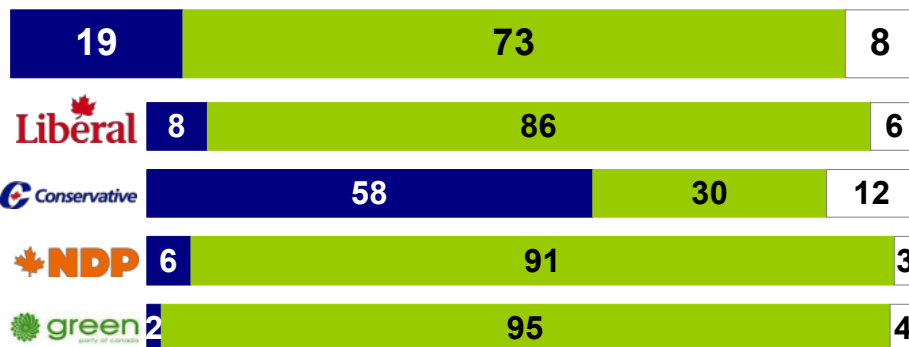
Lastly, respondents were asked whether they believe Canada should be more focussed on expanding fossil fuel exploration, mining, and drilling, or on improving energy efficiency, renewable energy, and regulation on energy use. By a margin of nearly four-to-one, respondents opt for the green option, with 73 per cent saying the focus should be on green energy investments. Just one in five (19 per cent) feel the country should be more focussed on expanding fossil fuel use.

- Compared to other provinces, Albertans are more likely to select expanding the use of fossil fuels (37 per cent, compared to 19 per cent on average), although a majority (51 per cent) would still prefer a focus on green energy.
- Conservative supporters are far more likely to opt for a focus on fossil fuels (58 per cent, compared to eight per cent of Liberal voters and six per cent of NDP supporters).

Expanding oil production vs. green energy investments

Q. Which of the following do you think should be a more important priority for Canada?

Overall



■ Expanding fossil fuel exploration, mining and drilling, and the construction of new power plants

■ More energy efficiency, renewable energy, and regulation on energy use

□ Don't know/No response

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