

CANADIANS SEE ENERGY AS IMPORTANT TO THEIR FUTURE PROSPERITY; THINK EXPORT MARKETS SHOULD BE DIVERSIFIED BEYOND THE US



Nik Nanos and Mitra Thompson

In their latest exclusive *Policy Options*/Nanos Research poll, Nik Nanos and Mitra Thompson find that Canadians see energy as vital to our future prosperity. By a wide margin, Canadians also believe the country should diversify its energy markets beyond the US. However, Canadians are about evenly divided on the issue of whether the Keystone XL pipeline, extending from Canada to the Gulf Coast of the US, should be built.

Les Canadiens estiment que l'énergie joue un rôle vital dans la future prospérité de leur pays, selon le dernier sondage exclusif réalisé pour *Options politiques* par Nik Nanos, président de Nanos Research. Et ils croient très majoritairement que le Canada devrait diversifier ses marchés énergétiques au-delà des États-Unis. Mais ils sont divisés sur la nécessité de construire le pipeline Keystone XL de l'Alberta jusqu'à la côte du golfe du Mexique.

Canadians see the country's energy resources as important to our future prosperity, and by a wide margin they also believe it's important for Canada to diversify its markets beyond the United States, which now accounts for 99 percent of Canada's exports in oil and natural gas.

These are the principal findings of an *Online Extra* survey conducted for *Policy Options* by Nanos Research. The poll, a national random telephone survey of 1,201 Canadians, was conducted between January 20 and 23, and has a margin of error of 2.8 percentage points, plus or minus, 19 times out of 20.

Fully 56.1 percent of Canadians ranked energy as rather to very important (between 8 and 10 on a scale of 10) to the country's future prosperity (question 1). Only 2.8 percent thought energy not all or not very important (between 1 and 3 on a scale of 10). That's not even a blip.

And when we asked Canadians whether Canada should diversify its energy markets away from the United States, which now accounts for 99 percent of our oil and gas exports, 74.7 percent agreed that we should develop a diversified energy strategy (question 2).

In other words, three Canadians in four agree that Canada needs to develop the emerging markets of the Asia Pacific and other regions of the world. Only 14.3 percent, one in seven, thinks the current focus on the US works well.

This view is generally held in this proportion in all regions of the country. In the Atlantic, 77.8 percent of respondents think Canada needs a diversified energy strategy, 76.1 percent of Quebecers agree, and there is 75.8 percent support for such a strategy in Ontario, 73.2 percent on the Prairies and 70.3 percent in British Columbia.

What Canadians are saying here is that while our relationship with the US is very important, they see a diversified energy strategy as key to the long-term future prosperity of the country.

And yet, Canadians are conflicted, or at least divided, on the issue of building a pipeline to transport oil from the Alberta oil sands to refineries on the Gulf Coast of the US.

Remarkably, 78 percent of Canadians, nearly four out of five had heard of TransCanada's Keystone XL pipeline project, which was very much in the news when we were in the field (question 3). The Obama administration had announced earlier in January that Keystone would not be approved on its proposed route across aquifers and agricultural land in Nebraska. Name recognition of Keystone XL was highest in British Columbia, at 92.5 percent, and lowest in Quebec, at 60.4 percent.

Over the past several months, Keystone has become the rallying cry for environmentalists in the US and Canada who oppose the Alberta oil sands. They also oppose Enbridge's proposed Northern Gateway pipeline project

from Edmonton to Kitimat on the West Coast. Northern Gateway is now under regulatory review.

Public opinion in Canada is about evenly divided on whether Keystone XL should go ahead.

While 26.7 percent of Canadians had a favourable impression of the

hand, 55.8 percent of Prairie residents had a favourable (36.2 percent) or somewhat favourable (19.6 percent) impression of Keystone XL, while in Quebec only 26.7 percent had a favourable (18.6 percent) or somewhat favourable (8.1 percent) impression of the project.

There are key themes that stand out when explaining the reasoning behind

those unfavourable to the project were opposed to the export aspect, saying that the oil should remain in Canada instead. Many who voiced this opinion thought that Canada risked losing out on refinery jobs and the possibility of cheaper oil by exporting its raw resources to the United States.

When we asked an open-ended question about the most important issue facing Canada in the energy sector, the responses varied widely (question 5). For example, 12.4 percent of Canadians said developing renewable/ greener energy sources was the top priority, another 9.8 percent thought energy supply was the most important, and another 8.3 percent thought respecting the environment was most important. The three top choices on this question speak directly to the thematic of this month's *Policy Options*: sustainable energy.

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project, and 18.5 percent a somewhat favourable impression, for total of 45.2 percent, another 27.3 percent had an unfavourable impression, and 14.4 percent a somewhat unfavourable impression, for a total of 41.7 percent opposed to the project (question 4a).

In fact, there are some very clear regional clusters of opinion. Quebecers consistently rate the environment as an important issue. On Keystone they represent the strongest pocket of opposition — 63.6 percent held a negative view of Keystone XL. On the other

Canadians' support or opposition to Keystone XL (question 4b). Those who had a favourable opinion were most likely to say that the project was good for the economy and would create jobs. Many also expressed confidence that pipeline technology is safe, and that the project in general made sense.

On the other hand, environmental concerns were most likely to be cited by those who said they were unfavourable to the project. Economic considerations were also in evidence among those opposed to the pipeline: a number of

Question 1. On a scale of 1 to 10 where 1 is not at all important and 10 is very important, how would you rate the energy sector in terms of the future prosperity of Canada?

		Total n	m	1 %	2 %	3 %	4 %	5 %	6 %	7 %	8 %	9 %	10 %	Unsure %
Region	Canada	1,201	7.72	1.3	0.5	1.0	1.9	8.7	7.3	17.4	23.2	9.3	23.6	5.8
	Atlantic	120	7.58	0.0	0.0	0.6	3.0	5.9	16.6	16.9	29.5	5.3	18.7	3.5
	Quebec	300	7.83	0.8	0.9	1.9	1.4	6.5	5.0	16.5	26.7	13.0	21.7	5.5
	Ontario	360	7.80	1.4	0.2	0.2	0.2	10.0	8.9	14.7	24.6	9.9	23.6	6.4
	Prairies	241	7.70	3.1	0.2	2.0	1.4	7.8	3.9	22.4	16.5	8.5	27.7	6.6
	BC	180	7.51	0.3	0.9	0.0	5.9	13.2	6.0	17.9	19.5	5.7	24.6	5.9
Gender	Male	620	7.84	1.0	0.4	1.1	1.3	7.9	6.6	19.0	23.8	9.4	25.4	4.0
	Female	581	7.60	1.6	0.5	0.9	2.4	9.6	8.0	15.7	22.6	9.2	21.6	7.8
Age	18 to 29	248	7.03	1.8	0.0	2.4	3.7	8.5	10.3	32.9	16.2	4.7	12.0	7.4
	30 to 39	204	8.04	1.2	0.6	0.0	3.4	4.9	6.8	10.1	27.2	11.1	28.3	6.3
	40 to 49	249	7.87	0.4	0.8	0.4	0.8	9.6	5.5	16.0	25.6	13.6	21.4	5.8
	50 to 59	214	8.03	1.0	0.0	0.8	0.9	10.8	6.2	12.9	23.0	8.7	32.9	2.9
	60 plus	286	7.73	2.0	0.9	1.1	0.7	9.4	7.3	13.8	24.6	8.6	25.2	6.4
Vote profile	Liberal	256	7.67	0.9	0.0	1.7	1.6	12.6	8.5	12.0	27.2	7.0	24.7	3.9
	Conservative	331	8.19	1.1	0.3	0.2	0.2	4.9	5.2	19.2	21.8	11.8	31.1	4.1
	NDP	234	7.48	0.5	0.7	0.4	5.0	5.6	11.8	19.8	26.6	8.1	16.1	5.4
	Bloc	52	7.64	0.0	2.2	3.8	2.2	7.1	2.2	18.5	27.5	12.0	19.3	5.2
	Green	42	7.09	3.8	0.0	0.0	0.0	28.1	1.4	15.0	22.3	5.9	18.3	5.2
	Other	12	6.64	18.0	0.0	0.0	0.0	14.1	0.0	5.8	28.7	9.2	18.3	5.8
	Undecided	273	7.56	1.7	0.6	1.5	1.8	9.6	6.8	19.0	17.5	9.4	21.7	10.4

Question 2. Almost 99 percent of Canadian oil is exported to the US. Some people think that the current focus on the US market works well. Other people think that Canada should diversify its energy markets. Which of these two views best reflects your personal opinion?

		<i>n</i>	The current focus on the US market works well %	Canada should diversify its energy markets %	Unsure %
Region	Canada	1,201	14.3	74.7	11.0
	Atlantic	120	13.9	77.8	8.4
	Quebec	300	13.8	76.1	10.1
	Ontario	360	12.4	75.8	11.8
	Prairies	241	16.7	73.2	10.0
	British Columbia	180	15.8	70.3	13.9
Gender	Male	620	14.5	75.3	10.2
	Female	581	14.1	74.1	11.8
Age	18 to 29	248	17.3	65.4	17.2
	30 to 39	204	12.8	79.1	8.1
	40 to 49	249	10.9	79.1	9.9
	50 to 59	214	19.4	73.1	7.5
	60 plus	286	11.8	77.1	11.1
Vote profile	Liberal	256	16.4	74.3	9.3
	Conservative	331	18.7	72.6	8.7
	NDP	234	11.7	79.8	8.5
	Bloc	52	9.8	86.2	3.9
	Green Party	42	27.0	53.0	20.0
	Other	12	9.2	85.8	5.0
	Undecided	273	8.2	74.2	17.6

Question 3. Prior to today, have you heard or not heard of the Keystone XL pipeline project, which proposes to transport synthetic crude oil from the Athabasca Oil Sands to the United States?

		Total <i>n</i>	Heard %	Not heard %
Region	Canada	1,201	78.1	21.9
	Atlantic	120	74.5	25.5
	Quebec	300	60.4	39.6
	Ontario	360	81.8	18.2
	Prairies	241	85.7	14.3
	British Columbia	180	92.5	7.5
Gender	Male	620	82.6	17.4
	Female	581	73.3	26.7
Age	18 to 29	248	68.2	31.8
	30 to 39	204	76.3	23.7
	40 to 49	249	77.8	22.2
	50 to 59	214	83.0	17.0
	60 plus	286	84.6	15.4
Vote profile	Liberal	256	76.7	23.3
	Conservative	331	86.7	13.3
	NDP	234	79.8	20.2
	Bloc	52	71.5	28.5
	Green	42	94.3	5.7
	Other	12	75.8	24.2
	Undecided	273	66.4	33.6

Question 4a. Do you have a favourable, somewhat favourable, somewhat unfavourable or unfavourable impression of the Keystone XL pipeline project?

		<i>n</i>	Favourable %	Somewhat favourable %	Somewhat unfavourable %	Unfavourable %	Unsure %
Region	Canada	938	26.7	18.5	14.4	27.3	13.1
	Atlantic	89	22.5	26.2	13.9	27.7	9.7
	Quebec	181	18.6	8.1	23.7	39.9	9.6
	Ontario	294	28.1	18.4	12.3	25.3	15.9
	Prairies	206	36.2	19.6	9.5	19.8	15.0
	British Columbia	167	23.4	24.1	14.6	26.3	11.6
Gender	Male	513	32.6	20.6	11.8	24.4	10.7
	Female	425	19.6	15.9	17.6	30.8	16.1
Age	18 to 29	169	17.5	21.8	13.6	32.1	15.0
	30 to 39	155	25.4	12.5	18.7	24.5	18.8
	40 to 49	194	25.3	19.6	16.3	26.1	12.8
	50 to 59	178	26.7	23.7	15.0	27.9	6.7
	60 plus	242	35.0	15.1	10.4	26.3	13.2
Vote profile	Liberal	197	26.0	17.7	19.3	26.6	10.3
	Conservative	287	46.4	25.0	6.9	11.5	10.2
	NDP	187	13.2	12.7	22.2	40.0	11.9
	Bloc	37	10.2	10.2	23.0	56.7	0.0
	Green	40	17.8	7.4	10.2	54.4	10.3
	Other	9	10.9	6.6	7.2	67.6	7.7
	Undecided	182	16.2	19.5	12.7	25.9	25.7

Question 4b. Why do you have that opinion?

	Favourable %	Somewhat favourable %	Somewhat unfavourable %	Unfavourable %	Total %
Pipeline is safe/makes sense	20.4	16.1	1.5	0.0	9.9
Good for economy/jobs	61.6	32.8	5.1	0.0	26.7
Environmental concerns	0.0	14.9	51.1	43.8	25.5
Unsafe/Risk of oil spills	0.0	0.6	5.1	6.3	2.9
I don't know enough about it	0.4	2.3	2.2	.8	1.2
The oil should stay in Canada	0.0	7.5	18.2	23.4	12.0
We need to reduce economic reliance on the US	0.0	2.9	2.9	3.1	2.1
Will keep Canada-US relationship strong	7.2	2.3	0.7	0.0	2.8
Canada should invest in greener energy sources	0.0	0.6	2.9	5.9	2.4
Other	4.8	4.0	2.9	10.5	6.1
Unsure	5.6	16.1	7.3	6.3	8.3

Question 5. In your opinion, what is the most important issue Canada is facing in the energy sector?

	<i>n</i>	%	Valid %	Cumulative %
Developing renewable/greener energy sources	149	12.4	16.8	16.8
Energy supply	117	9.8	13.2	30.0
Respecting the environment	100	8.3	11.3	41.3
Oil pipeline	91	7.5	10.2	51.5
Cost of electricity/fuel	83	6.9	9.4	60.9
Developing a self-reliant energy sector	72	6.0	8.1	69.0
Oil sands	62	5.2	7.0	76.0
Access to export markets	62	5.2	7.0	83.0
Pollution	51	4.3	5.8	88.8
Greenhouse gas/climate change	35	2.9	3.9	92.7
Other	31	2.6	3.5	96.2
Northern development	17	1.4	2.0	98.2
Environmentalists/those who oppose energy projects	16	1.3	1.8	100.0
Total valid	887	73.9	100.0	
Unsure	314	26.1		
Total sample	1,201	100.0		