
The Federal Idea, the Canada West Foundation, the Mowat
Centre for Policy Innovation (University of Toronto) and
the Atlantic Provinces Economic Council

Canada and its Natural Resources

OCTOBER 2013

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┌ C R O P ─┐

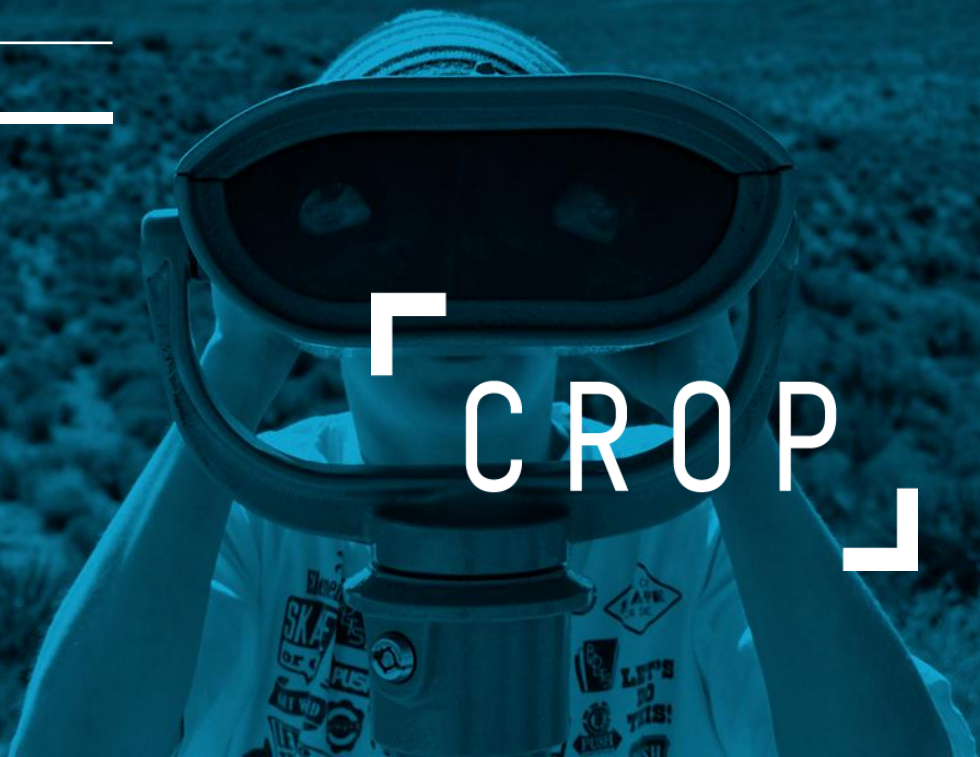


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A man in a dark suit and tie is sitting on a wooden bench, reading a book. He is looking down at the pages. To his left, a can is on the bench. The background shows a stone wall and a cobblestone path. The entire image has a blue tint.

CONTEXT

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Context

CROP was appointed by a group composed of The Federal Idea, the Canada West Foundation, the Mowat Centre for Policy Innovation (University of Toronto) and the Atlantic Provinces Economic Council to measure Canadian perceptions of the hydrocarbon sector.

The following pages provide the results in detail.

STATE AND INDUSTRY RESPONSIBILITIES

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PERFORMANCE OF VARIOUS INDUSTRIES

Industry performance

Balancing economic growth and protection of the environment

% Very + Somewhat good (6-10)	REGION				
	TOTAL (n=2000)	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
The agriculture industry	69	66	70	69	73
Forestry	58	49	59	62	61
The fishery industry	55	56	56	53	61
The oil & gas industry	37	28	38	41	40
The mining industry	37	34	38	39	36

Respecting the views of local communities affected by natural resources development

% Very + Somewhat good (6-10)	REGION				
	TOTAL (n=2000)	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
The agriculture industry	69	68	70	69	71
The fishery industry	60	63	61	56	66
Forestry	56	50	56	58	66
The mining industry	37	33	38	39	38
The oil & gas industry	34	28	34	38	36

Q1. On a scale of 1 to 10 where 1 means very poor and 10 means very good, how well do the following industries do to balance economic growth and the protection of the environment?

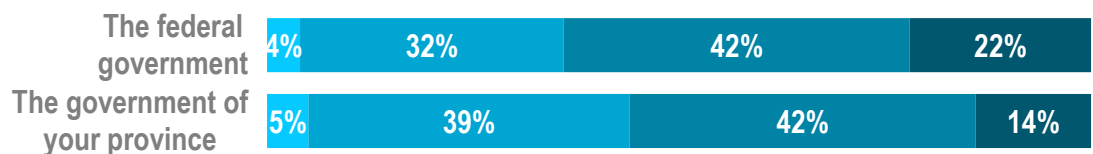
Q2. On a scale of 1 to 10 where 1 means very poor and 10 means very good, how well do the following industries do to respect the views of local communities affected by natural resources development?

GOVERNMENT PERFORMANCE

Government performance

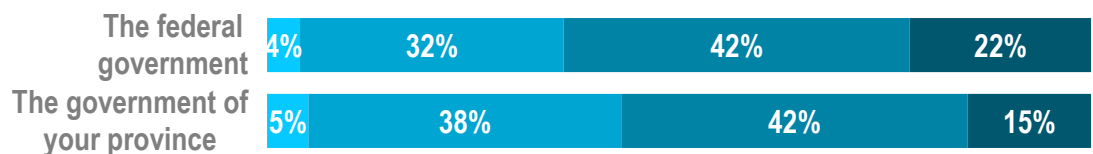
Sample: All respondents n=2000

Balancing economic growth and protection of the environment



■ Very good (9-10) ■ Somewhat good (6-8) ■ Somewhat poor (3-5) ■ Very poor (1-2)

Respecting the views of local communities affected by natural resources development



■ Very good (9-10) ■ Somewhat good (6-8) ■ Somewhat poor (3-5) ■ Very poor (1-2)

% 6-10	REGION			
	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
Federal	28	38	39	38
Provincial	46	41	48	47

% 6-10	REGION			
	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
Federal	32	36	40	34
Provincial	45	40	45	43

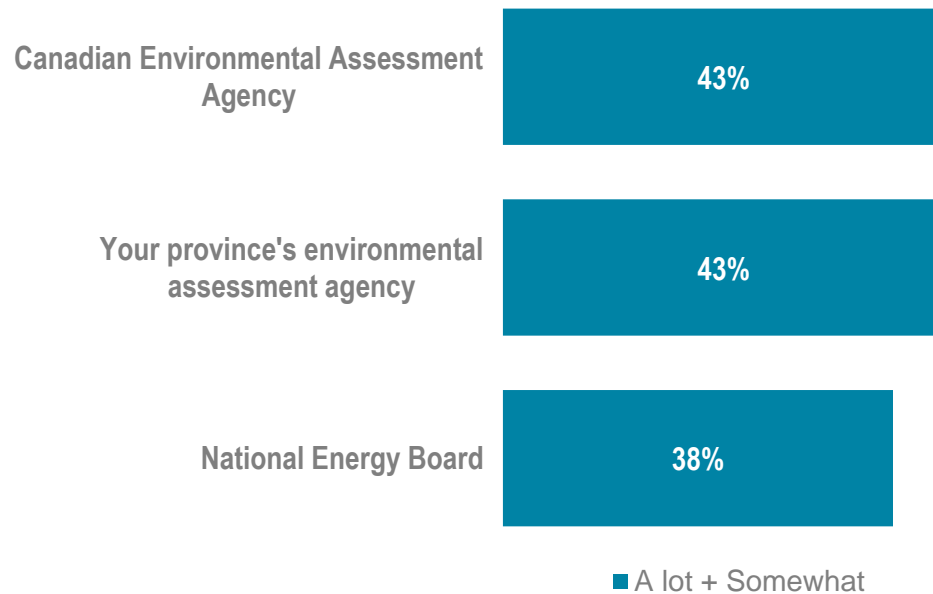
Q3. On a scale of 1 to 10 where 1 means very poor and 10 means very good, how well do the following governments do to balance economic growth and the protection of the environment?

Q4. On a scale of 1 to 10 where 1 means very poor and 10 means very good, how well do the following governments do to respect the views of local communities affected by natural resources development?

LEVEL OF TRUST IN VARIOUS ORGANIZATIONS

Level of trust in various organizations when it comes to natural resources development

Sample: All respondents n=2000



	REGION			
	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
Canadian Environmental Assessment Agency	35	47	43	54
Your province's environmental assessment agency	45	42	40	47
National Energy Board	33	37	41	45

Q5. . To what extent do you trust the following organizations to review natural resources development projects in an objective manner?

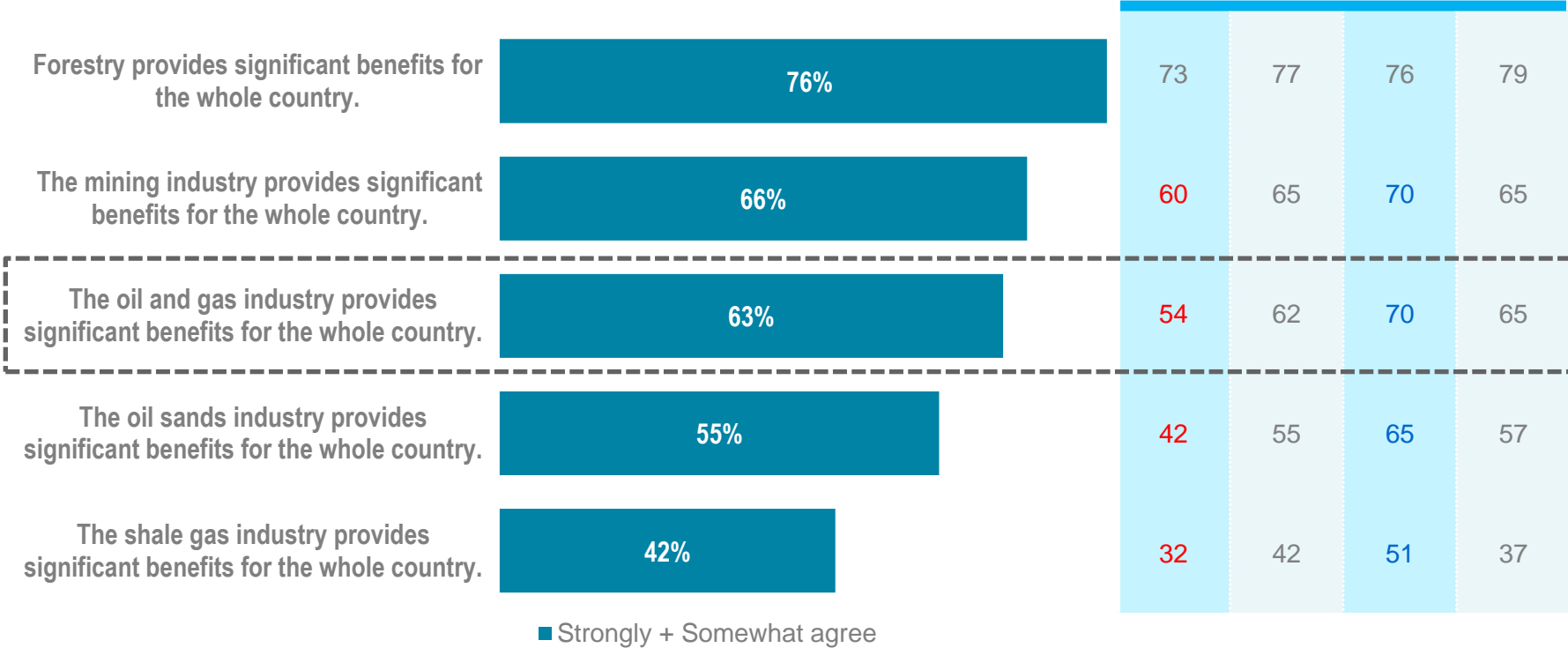


NATURAL RESOURCES AS SOURCES OF WEALTH

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Perception of benefits drawn from various industries

Sample: All respondents n=2000



Q6. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements?

Type of network Canada should build

Sample: All respondents n=2000

Canada should build...

...an electricity grid from sea to sea so that the whole country can access Canadian electricity.

76%

...a gas-pipeline network from sea to sea so that the whole country can access Canadian gas.

68%

...an oil-pipeline network from sea to sea so that the whole country can access Canadian oil.

65%

■ Strongly + Somewhat agree

REGION

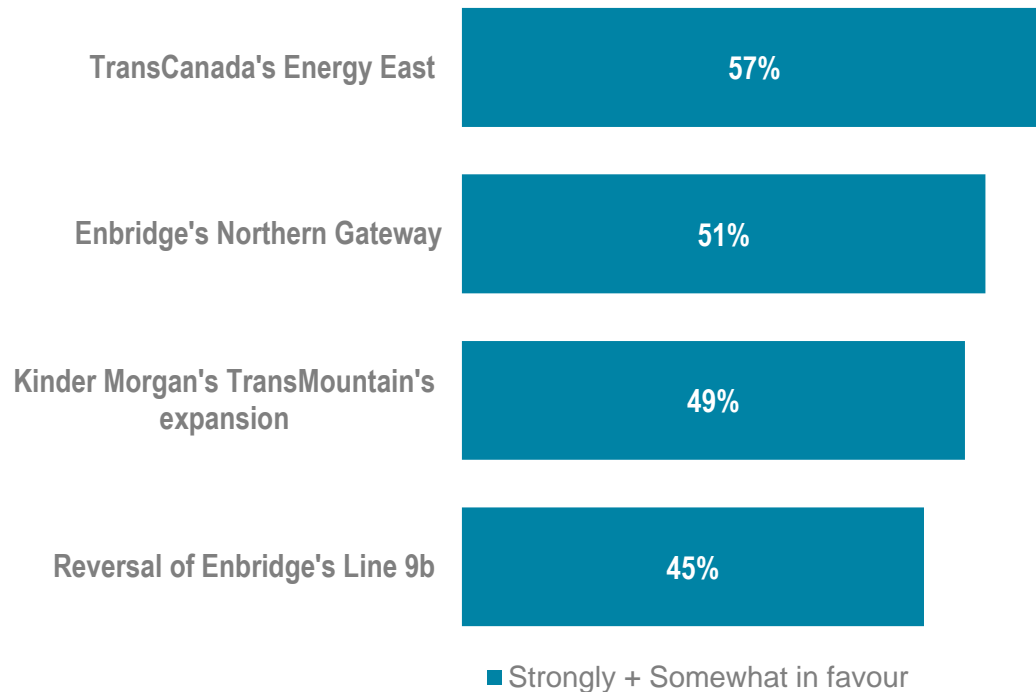
QUEBEC (n=610) ONTARIO (n=760) WEST (n=399) ATLANTIC (n=231)

Statement	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
...an electricity grid from sea to sea so that the whole country can access Canadian electricity.	77	77	73	79
...a gas-pipeline network from sea to sea so that the whole country can access Canadian gas.	62	70	68	73
...an oil-pipeline network from sea to sea so that the whole country can access Canadian oil.	63	66	64	73

Q7. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements?

Favourability towards pipeline projects

Sample: All respondents n=2000



	REGION			
	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
TransCanada's Energy East	56	57	55	65
Enbridge's Northern Gateway	46	52	56	45
Kinder Morgan's TransMountain's expansion	45	50	52	44
Reversal of Enbridge's Line 9b	46	48	40	42

Q8. Are you strongly in favour, somewhat in favour, somewhat against or strongly against the following pipeline projects?

Development of oil sands

	REGION				
	TOTAL (n=2000)	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
The oil sands should continue to be developed	42	25	47	51	40
The oil sands should continue to be developed but more slowly than today	41	44	41	39	47
The oil sands should not be developed	16	30	12	11	12

Q9. Which of these three statements best reflect your own opinion?

Processing of natural resources

	REGION				
	TOTAL (n=2000)	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
Canada should try to process more of our natural resources in Canada before they are exported	78	71	82	78	78
Canada should let the market decide whether more processing of natural resources will take place in Canada	21	28	17	20	21
Prefer not to answer	1	1	1	2	1

Q10. Which of the following two statements best represent your opinion?

Keystone XL project

	REGION				
	TOTAL (n=2000)	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
President Obama should authorize the Keystone XL project because it will be good for both the Canadian and the US economy, without significantly increasing global greenhouse gas emissions	62	48	65	67	71
President Obama should block the Keystone XL project because it will bring larger production of oil from the Alberta oil sands and significantly increase global greenhouse gas emissions	37	50	34	32	28
Prefer not to answer	1	1	0	0	1

Q11. As you may know, President Barack Obama will soon decide whether to approve or not the Keystone XL pipeline project, which would allow for increased exports of Canadian oil to the US. Which of the following statements best reflect your opinion?



SOCIAL ACCEPTABILITY

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Conditions on development of natural resources

Sample: All respondents n=2000

No natural resources development project should be allowed to go ahead...

...if the government of the affected province or the governments of the affected provinces is (are) opposed

66%

...if the people living in the affected area are opposed.

60%

...if a First Nation believes it has rights over the affected territories

42%

REGION

	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
...if the government of the affected province or the governments of the affected provinces is (are) opposed	75	61	64	69
...if the people living in the affected area are opposed.	63	59	58	62
...if a First Nation believes it has rights over the affected territories	45	43	37	41

Q12. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements?



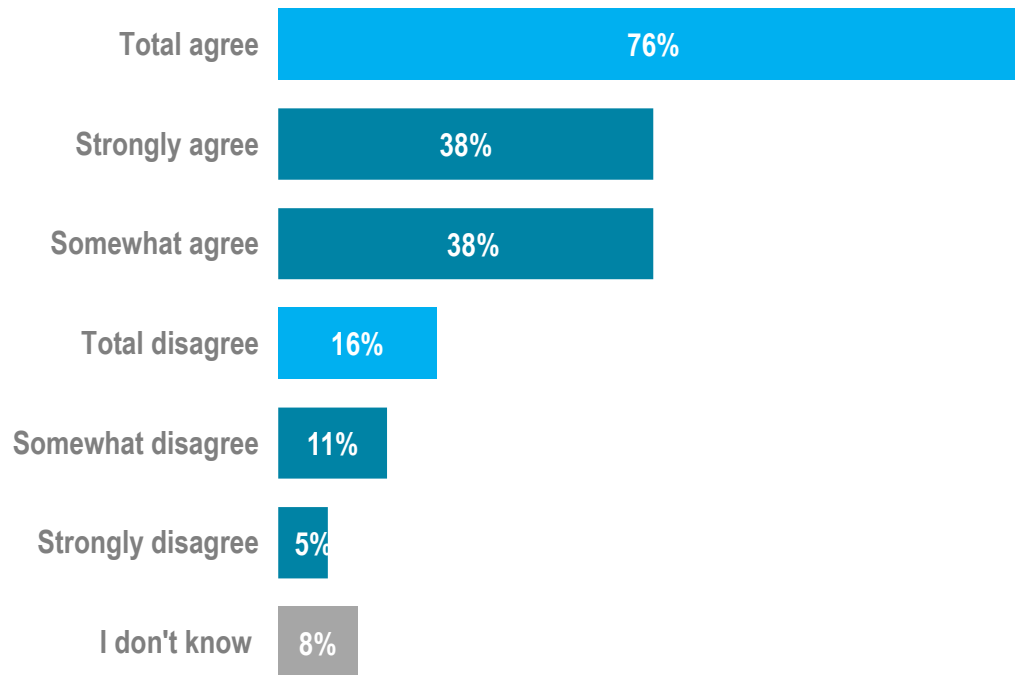
THE ENVIRONMENT AND CLIMATE CHANGE

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Opinion on greenhouse gases

Sample: All respondents n=2000

It is scientifically proven that greenhouse gases produced by human activity increase the Earth's temperature and that that will have serious effects on the environment.



	REGION			
	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
Total agree	84	75	68	84
Strongly agree	45	36	33	43
Somewhat agree	39	40	36	40
Total disagree	10	15	23	12
Somewhat disagree	7	10	15	10
Strongly disagree	3	6	8	2
I don't know	6	9	8	5

Q13. Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements?

Actions to address climate change

Sample: All respondents n=2000

The PROVINCIAL GOVERNMENT is doing...

REGION

	TOTAL (n=2000)	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
...too much	6	5	7	8	1
...about the right amount	35	35	30	41	29
...not enough	59	60	63	51	70

The FEDERAL GOVERNMENT is doing...

...too much	5	4	4	8	0
...about the right amount	27	18	28	35	25
...not enough	68	79	69	58	75

INDIVIDUAL CANADIANS are doing...

...too much	4	5	5	4	0
...about the right amount	26	22	24	32	23
...not enough	70	73	71	64	77

Q14. Is your provincial government doing too much, about the right amount or not enough to address climate change?

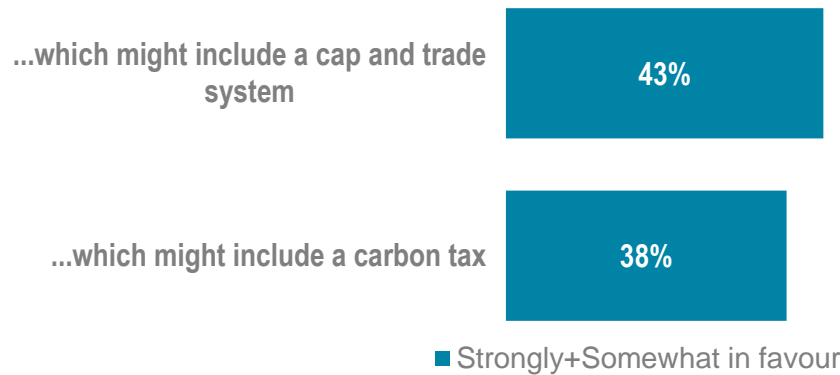
Q15. Is the federal government doing too much, about the right amount or not enough to address climate change?

Q16. Are individual Canadians doing too much, about the right amount or not enough to address climate change?

Opinion on putting a price on carbon

Sample: All respondents n=2000

In order to reduce Greenhouse gas emissions, the federal government should put a price on carbon...

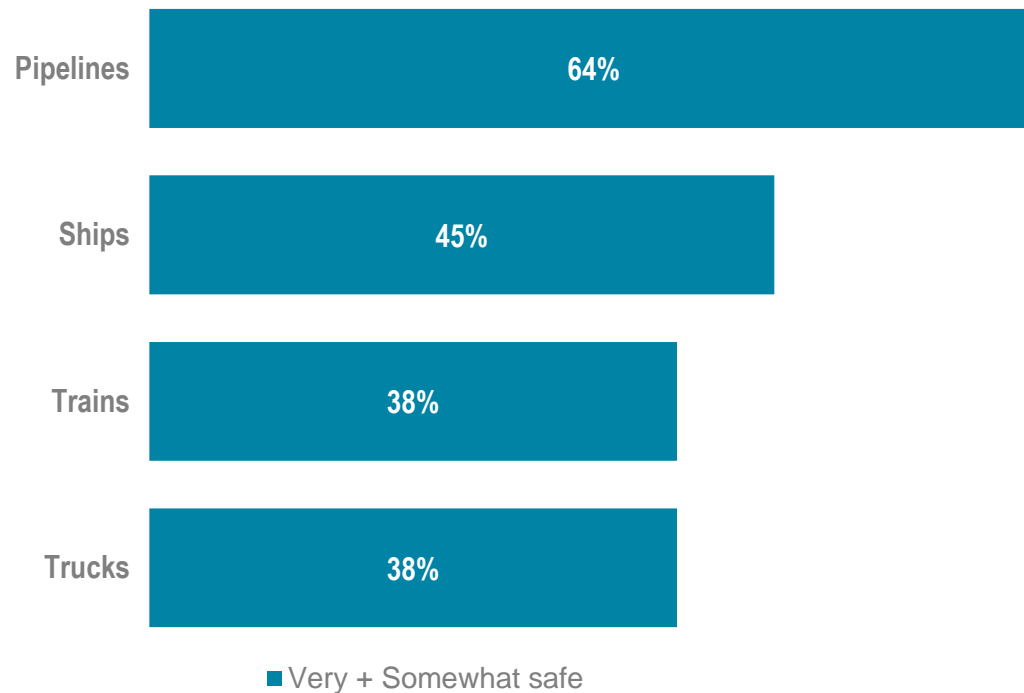


REGION			
QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
59	38	37	39
37	37	40	41

Q17. Do you strongly in favour, somewhat in favour, somewhat against or strongly against that in order to reduce Greenhouse gas emissions, the federal government should put a price on carbon...

Oil and gas transportation

Sample: All respondents n=2000



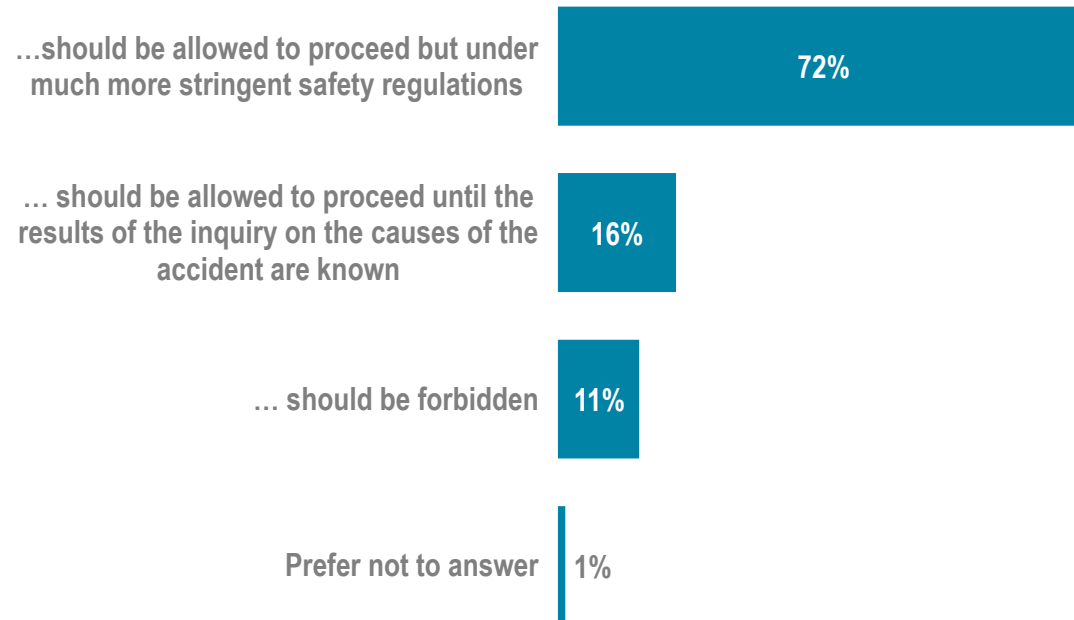
	REGION			
	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
Pipelines	62	67	61	69
Ships	40	45	47	55
Trains	27	40	44	47
Trucks	34	38	38	46

Q18. To what extent do you consider safe or dangerous each of the following ways to transport oil and gas?

Oil transportation after the Lac-Mégantic tragedy

Sample: All respondents n=2000

Following the Lac-Mégantic tragedy, transportation of oil by rail...



	REGION			
	QUEBEC (n=610)	ONTARIO (n=760)	WEST (n=399)	ATLANTIC (n=231)
...should be allowed to proceed but under much more stringent safety regulations	75	71	72	73
... should be allowed to proceed until the results of the inquiry on the causes of the accident are known	9	18	18	20
... should be forbidden	16	10	9	7
Prefer not to answer	0	1	1	0

Q19. Which of the following statements best reflect your opinion?



METHODOLOGY

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Methodology

STUDY POPULATION

A total of **2000 questionnaires** were completed by **Canadian adults**.

DATA COLLECTION

Collection period: September 24th to 30th, 2013

Collection method: Online survey

Recruitment: Respondents were recruited via web panel

Questionnaire length: 9 minutes

WEIGHTING

Results were weighted to reflect the distribution of the Canadian population aged 18 years old and over according to the AREA of residence, gender, and age. In QUEBEC, results were also weighted according to the respondents' mother tongue.

Note that considering the non-probabilistic nature of the sample, margin of error does not apply.

HOW TO READ THE DATA

Significant difference that are...

...**higher** are indicated **IN BLUE**

...**lower** are indicated **IN RED**



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