

CANADA WEST FOUNDATION POWERING UP FOR THE FUTURE INITIATIVE

Reading the Meter

WESTERN CANADIAN OPINIONS ON ENERGY ISSUES

APRIL 2011

Robert Roach, Senior Researcher & Director of the West in Canada Project

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Powering Up for the Future Initiative

The Powering Up for the Future Initiative focuses on public policy challenges at the interface of the economy, the environment and energy. Powering Up is driving informed discussion on policy choices shaping our energy future, for the benefit of western Canada and all Canadians.

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FOREWORD BY ROGER GIBBINS

Time for a National Debate on Energy

Both western Canada and Canada as a whole have a lot to gain and a lot to lose when it comes to how the federal government tries to shape the future of the country's energy production and consumption. The right policy will secure jobs, improve environmental performance and generate a strong sense of national purpose. The wrong policy will hamstring the economy, undermine action on the environment and fan the flames of regional division.

Despite this, debate at the federal level about a comprehensive energy strategy that facilitates the efforts of industry and consumers has amounted to little more than overwrought rhetoric about the oil sands.

What's missing is a sustained exchange of views on exactly how Canada will meet its energy needs, realize its energy opportunities and address its energy challenges over the next 10, 20 and 30 years. The importance of this lies in the fact that how we produce, consume, transport and sell energy is fundamentally important to our economy, our environment, our international role and our federal system. The stakes are incredibly high.

In an effort to provide a starting point for a robust national debate about Canada's energy future, the Canada West Foundation commissioned a public opinion survey that asked western Canadians a series of questions about energy. The results are summarized in this report and reveal a public that understands the connection between Canada's energy resources and its economic success. At the same time, western Canadians are anxious to see more green energy developed and more action on the environmental effects of our current energy systems.

The survey shows that the public clearly feels strongly about energy issues. So why the relative silence about Canada's energy future from federal politicians? The likely reason is that they do not have a good handle on what Canada's long-term energy strategy should look like. Hopefully, once the shadow of the federal election lifts, this void will be filled and a debate about the full range of energy issues facing the country will develop.

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If and when it does, the findings outlined in this report will provide parliamentarians with a good sense of where western Canadians sit on key energy issues. They can then decide if they want to align with current public opinion or attempt to change it by suggesting alternative courses of action.

In the meantime, the Canada West Foundation has been working with a broad range of energy sector stakeholders to advance the idea of a *Canadian energy strategy*. This strategy needs to be built from the ground up and involve voices from across the country and from across the various components of the energy system. It also has to be an *ongoing* process rather than a one-off exercise that yields a well-intentioned report that ends up doing little more than gathering dust on a shelf.

The Canada West Foundation will be “working this file” diligently over the next few years. Industry is on board. The public is on board. Now we just need to get the political leadership in Ottawa to catch on. This is no easy task, but the benefits of a proactive, practical and effective energy strategy that integrates local circumstances with nationwide coordination are definitely worth the effort.



Dr. Roger Gibbins
President and CEO
Canada West Foundation
Calgary, April 2011

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I. Introduction

Western Canadians hold a variety of views on the future of energy production and use in the region. Most westerners see a link between their household's standard of living and the energy industries that operate in their home provinces. As westerners, we know that the energy sector helps butter our economic bread by providing jobs, stimulating investment and generating government revenue.

At the same time, there is a strong degree of apprehension about one of the country's (indeed the world's) largest natural resource assets—the Alberta oil sands. While outright opposition to the oil sands is quite low in the West, large numbers of westerners would like to see better environmental results even if this means slowing the pace of development.

When asked about the best option for creating an energy strategy to address the many issues we face in this area, westerners are split almost evenly between favouring a national approach, a regional approach and a series of unique provincial approaches. Hence, if a national strategy is pursued, the survey results indicate that it must take pains to fully integrate the unique situations and specific aspirations of all parts of the country and that it must be built from the ground up rather than Ottawa down. If it does not do this, public support for the strategy will be weak.

The results also show that westerners are generally in favour of adding more green energy options to the mix even if this costs them more on their energy bills or in the form of higher taxes. Just how much westerners are willing to pay is unclear, but there is a strong signal that the public in western Canada is on board with the global shift toward using more green energy.

Other than hydro power in Manitoba and BC, green energy options remain on the margins of the region's energy use and exports. Coal, oil, natural gas and uranium (though not actual nuclear power), however, remain core components of the West's energy system and likely will for some time. When asked about expanding two of these core components—natural gas and nuclear power—there is strong support for more natural gas facilities and mixed feelings about the introduction of nuclear power.

Overall, policy-makers, industry and commentators face a public that has a wide range of opinions about the future of energy in western Canada and should, therefore, be both aware of, and sensitive to, the complexity of public opinion in this area. With that said, it is clear that a majority of western Canadians see the value of the region's energy sector but also see the value in alternative approaches to the status quo and the need for careful environmental stewardship.¹

¹ The survey also included a series of question regarding environmental issues. These results are discussed in a companion report entitled *Green Expectations: Western Canadian Opinions on Environmental Issues*.

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2. Methodology

The survey field work was conducted by Environics Research Group Limited as part of its November 2010 Canadian Environmental Barometer and a special survey of western Canadians commissioned by the Canada West Foundation. The results from the Canadian Environmental Barometer are used with the permission of Environics Research Group Limited.

The Canadian Environmental Barometer was conducted by telephone between November 24 and December 2, 2010 and the results are based on a representative sample of 2,008 Canadians 18 years and older. The results are accurate for the full sample to within +/-2.2 percentage points 19 times out of 20.

The special survey commissioned by the Foundation was conducted by telephone between November 24 and December 8, 2010. The results are based on a representative sample of 1,202 western Canadians (300 per province) 18 years and older. The results are accurate for the full sample +/-2.8 percentage points 19 times out of 20. Data are weighted by province, age and gender.

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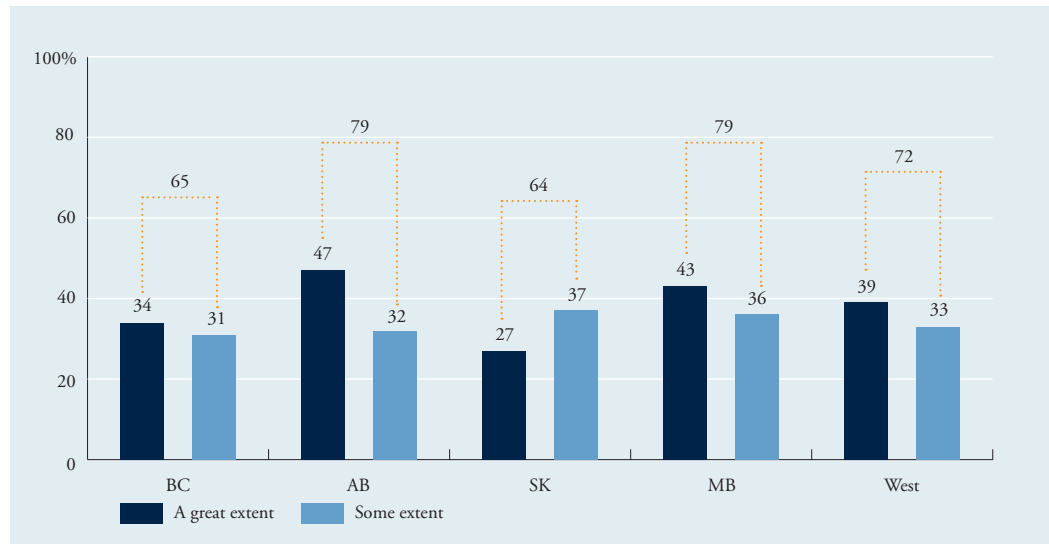
3. Key Findings

The Energy Sector and Our Standard of Living

The energy sector is a key economic driver in all four western provinces. While only a small percentage of western Canadians actually work in the energy sector, it helps support jobs in a wide variety of other sectors such as public administration, accounting and legal services, construction, manufacturing, retail trade and so on. Whether it is oil and gas, coal, hydro or uranium, the energy industry pulls investment, government revenue, and direct and indirect jobs along in its wake.

The results indicate that western Canadians understand the connection between their provincial energy sectors and their standard of living. Almost three quarters of western Canadians (72%) report that their household’s standard of living depends to either a “great extent” or “some extent” on the health of the energy sector in their province. Only 9% of westerners feel that their household’s standard of living does not depend at all on the health of the energy sector (17% selected “only a little” to describe the energy sector’s impact on their household’s standard of living).

FIGURE 1: TO WHAT EXTENT DOES YOUR HOUSEHOLD’S STANDARD OF LIVING DEPEND ON THE HEALTH OF THE ENERGY SECTOR IN YOUR PROVINCE? (%)



Survey question: As you may know, there is a significant energy sector in your province that includes such industries as [PROVINCE-SPECIFIC: oil and gas, coal, hydro-electric power, uranium]. To what extent does your household’s standard of living depend on the health of the energy sector in your province? Is it a great extent, some extent, only a little, not at all, don’t know/not applicable?

Source: Environics Research Group Limited, special survey for the Canada West Foundation.

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When the results are broken down by province, we find that people living in Manitoba (with its significant hydro capacity) and in Alberta (Canada's oil and gas capital) are the most likely (79%) to see a strong connection between the energy sector and their household's standard of living. Despite a strong energy industry presence in both Saskatchewan and BC, the proportion of people who feel that their standard of living depends on the energy sector to a great extent or some extent is somewhat lower (64% and 65% respectively), but still a strong majority. In no province is the percentage who feels that there is no connection greater than 10%.

Looking at the West's three largest cities, Calgarians stand out as particularly attuned to the connection between Alberta's energy sector and their standard of living (80% of Calgarians report that their household standard of living depends to a great or some extent on the health of the energy sector), followed by Edmonton (71%) and Vancouver (58%).

The variations across employment, family income, education, gender and age are all quite small with one exception; respondents with a university degree were a little less likely to say that their household standard of living depends to a great or some extent on the health of the energy sector (65%).

A National Energy Strategy?

In Texas, past injustices are summed up by the rallying cry "Remember the Alamo!" In Alberta, it's "Remember the National Energy Program!" The NEP was imposed by the Trudeau government in 1980 and cut the knees out from under the Alberta energy patch. So when someone suggests that Canada needs an energy strategy, Albertans get a bit nervous. Despite this, just over a third (35%) of Albertans favour a single national energy strategy over a regional or provincial approach. In fact, it is Saskatchewanians who are least likely to prefer a national approach at just 21% on side with this idea.

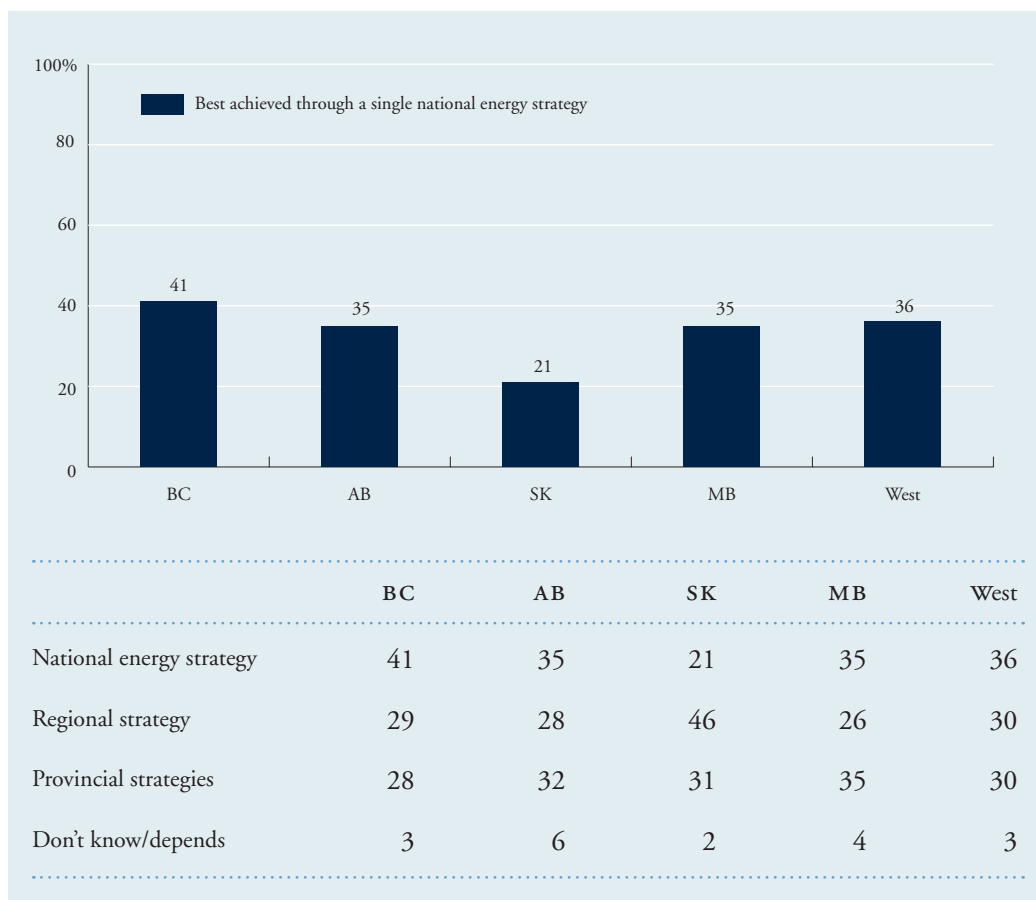
It is important to stress that the goal of a national (a.k.a. Canadian) energy strategy is not to lessen the cost of energy for one region at the expense of another. Rather, the idea is to have a practical plan in place that can ensure that *all* parts of the country benefit fully from their energy resources over the long-term. Who will we be exporting to and how will we get it to them? How will Canada meet its domestic energy needs in the coming decades? How do we continue to improve environmental stewardship on the part of both producers and consumers? How do we drive innovation and adoption of new technology? Answering these and similar questions is what a Canadian energy strategy would do via a coordinated approach and a consistent set of policies and rules developed, not from the top down in Ottawa, but as the result of a truly national dialogue.

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When we check in with western Canadians, however, the majority (60%) supports either a regional plan or unique provincial approaches over a single national strategy. The western Canadian public is not of one mind on this issue with 36% on side with a national approach, 30% thinking that regional cooperation is the best way forward and 30% thinking that unique provincial strategies make the most sense. When we break down the responses by province, we find that a national strategy is more popular in BC (41%) and less popular in Saskatchewan (21%). Saskatchewanians are particularly interested in a regional strategy (46%).

So while there may be good reasons for pursuing a national energy strategy, there is work to be done to convince westerners that this is the best path forward and, if the national path is taken, to ensure that it respects and incorporates provincial input and regional structures.

FIGURE 2: BEST WAY TO ADDRESS ENERGY ISSUES (%)



Survey question: Many are now talking about the importance of developing a strategy for addressing the energy challenges facing the country. Do you think this is best achieved through: a single national energy strategy to ensure there is a coordinated approach and consistent set of policies and rules for industry, governments and consumers to follow; the four western provinces developing a regional strategy to address the priorities of western Canada; or each province and territory developing its own energy strategy based on its particular economy, priorities and needs?

Source: Environics Research Group Limited, special survey for the Canada West Foundation. Numbers may not add to 100 due to rounding.

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Calgarians (42%) are slightly more likely to favour a national approach than Edmontonians (37%). People who live in communities with populations of less than 5,000 are less likely to favour a national strategy (28%) than those in large cities (43%). Generally speaking, the smaller the community, the more likely its residents support a provincial or regional approach. There is some variation in the results based on employment, family income, education, gender and age, but no clear pattern emerges. Of note, those making less than \$20,000 per year are the most likely income group to favour a national strategy (40%) and those with a university degree are the most likely education group to favour a national strategy (46%).

There has not been a high profile public debate about a national energy strategy versus regional or provincial approaches. There are no attack ads on TV denouncing one approach and the media has not been abuzz with arguments for and against the three options. Given this, the survey question likely taps the “gut feelings” of western Canadians. This suggests that there is room to move public opinion—hopefully not with attack ads!

Willingness to Pay More for Green Energy

“Green” (i.e., non-fossil fuel) energy options such as solar power, wind energy, geothermal heat and hydroelectric power are at various stages of commercial development in western Canada. BC and Manitoba have large amounts of hydro capacity such that most of the electricity produced in these provinces comes from this source (hydro accounts for 98.4% of Manitoba’s electricity generation and 89.3% of BC’s).¹ This proportion falls to 21.3% in Saskatchewan and 3.8% in Alberta where coal is a key source of electrical power. Residents of all four western provinces rely heavily on oil and natural gas for transportation and heat. As such, fossil energy sources remain a huge piece of the energy puzzle in western Canada.

A transition away from the fossil fuel energy sources upon which we currently rely toward greener options will, at least in the short-term, cost more money than current sources. These costs will have to be passed on to residents through either higher taxes or higher energy bills. This raises a key question: how willing are western Canadians to pursue green energy if it costs them more money?

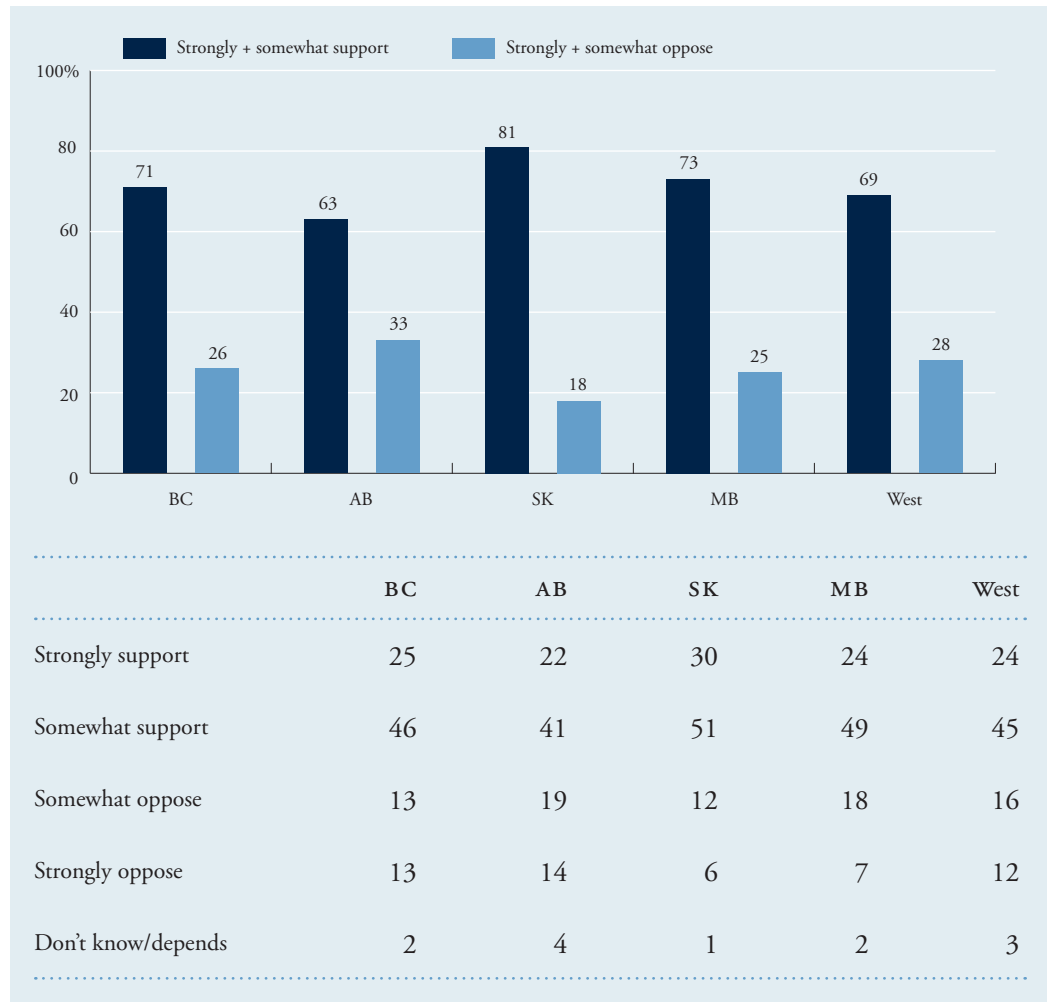
When asked about their willingness to shoulder higher energy costs in the name of more green energy, we found that 24% of western Canadians strongly support paying higher energy prices to support green energy in their province and 45% say they somewhat support paying more. On the other side of the ledger, 16% somewhat oppose paying more and 12% strongly oppose higher energy costs. This yields a split of 69% at least somewhat willing to pay more versus 28% opposed to digging deeper into their pockets if that is what green energy requires.

¹ Robert Roach. 2010. *State of the West 2010: Western Canadian Demographic and Economic Trends*. Figure 115. Canada West Foundation.

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Given these results, it is clear that the idea of green energy—even if it costs more—is fairly popular among the western Canadian public. Admittedly, this popularity must be seen in the context of a question that does not indicate *how much more* the costs might be. People who are asked about paying more for something in the abstract are often less supportive when an actual bill arrives. It is also unlikely that respondents were imagining the costs associated with, for example, mothballing Alberta and Saskatchewan’s massive coal-fired electricity plants and replacing them with something else. Nonetheless, the survey findings point to a large core of public support—at least in theory—for green energy, even if there are increased costs associated with it.

FIGURE 3: SUPPORT FOR PAYING HIGHER ENERGY COSTS IN THE NAME OF GREEN ENERGY (%)



Survey question: Do you strongly support, somewhat support, somewhat oppose or strongly oppose paying higher energy prices to support green energy in your province?

Source: Environics Research Group Limited, special survey for the Canada West Foundation. Numbers may not add to 100 due to rounding.

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Despite their green reputation, BC residents are actually less likely than Saskatchewan residents to support higher prices for green energy at 71% and 81% respectively. While still a majority of the population, only 63% of Albertans support paying more. British Columbians and Albertans are most likely to *strongly* oppose paying more at 13% and 14% respectively. Interestingly, more Calgarians (69%) than Edmontonians (58%) support paying more.

Even though a majority of each of the following groups reports a willingness to pay more for green energy, homemakers (59%), retired people (58%), people earning less than \$20,000 per year (61%) and people 60 years of age and older (62%) are less likely to support higher energy prices in the name of green energy. People with less than a high school diploma are least likely to support the idea of paying more (48%). The categories with the highest percentages who *strongly* support paying more are those aged 18-29 (36%), those with a university degree (38%) and those who make \$80,000 or more (31%).

Government Support for Green Energy Options

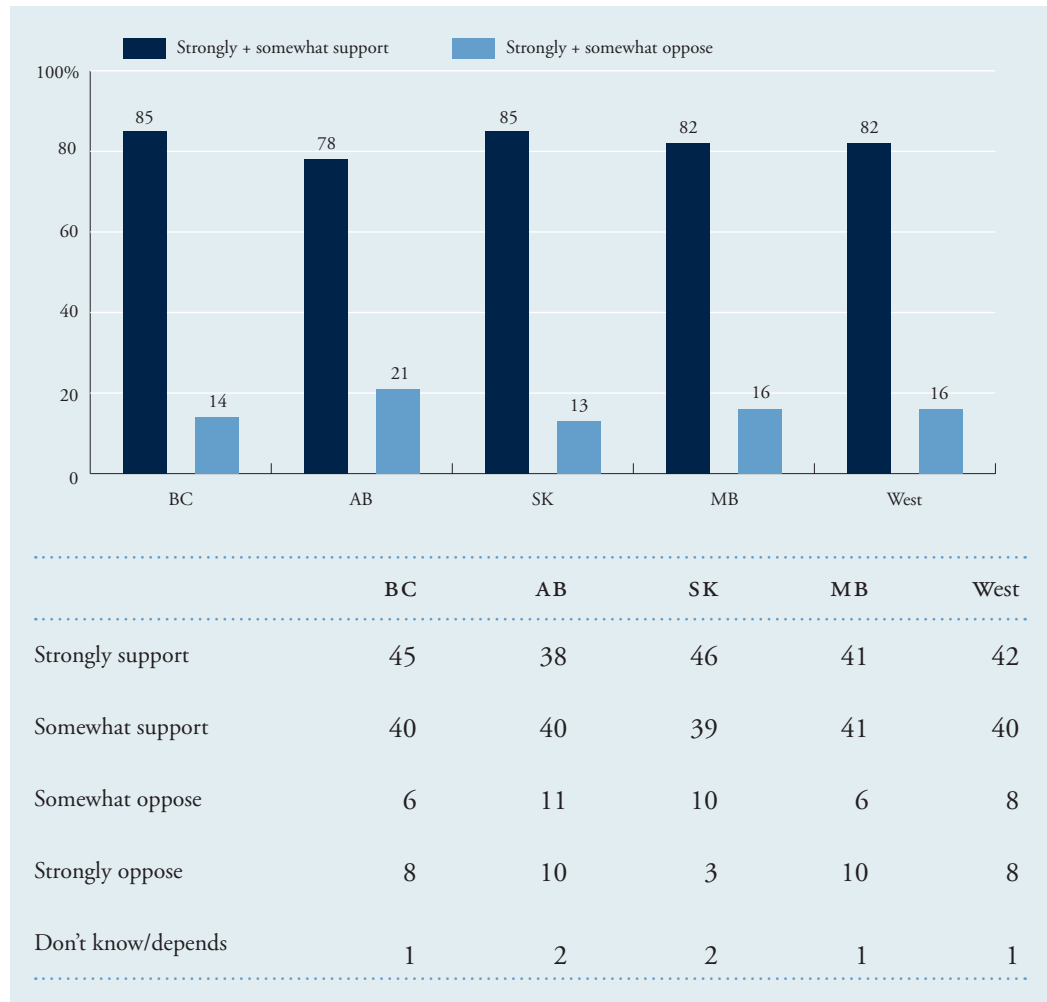
A larger proportion of western Canadians (82%) supports using public money to help develop new sources of green energy than supports paying more for it on their energy bills (69%—see Figure 3 above). It is important to point out that the question does not force respondents to make tradeoffs between using tax dollars for green energy and cutting other spending or raising taxes to pay for it. Some respondents will take this into consideration but others will not. Nonetheless, the results are informative because they reveal a western Canadian public that is open to the idea of using tax dollars to help develop green energy options in their province.

Opposition to using public money to help industry develop new sources of green energy is highest among Albertans with 21% either somewhat or strongly opposed and lowest among Saskatchewanians (13%) and British Columbians (14%).

Women (86%) are somewhat more likely to support spending tax dollars to help develop green energy than men (78%) as are people with a university degree (88%) and homemakers (95%).

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FIGURE 4: SUPPORT FOR USING TAX DOLLARS TO ENCOURAGE GREEN ENERGY OPTIONS (%)



Survey question: Do you support using government tax dollars to help industries in your province cover some of the costs of developing new sources of green energy such as wind and solar energy?

Source: Environics Research Group Limited, special survey for the Canada West Foundation. Numbers may not add to 100 due to rounding.

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Natural Gas

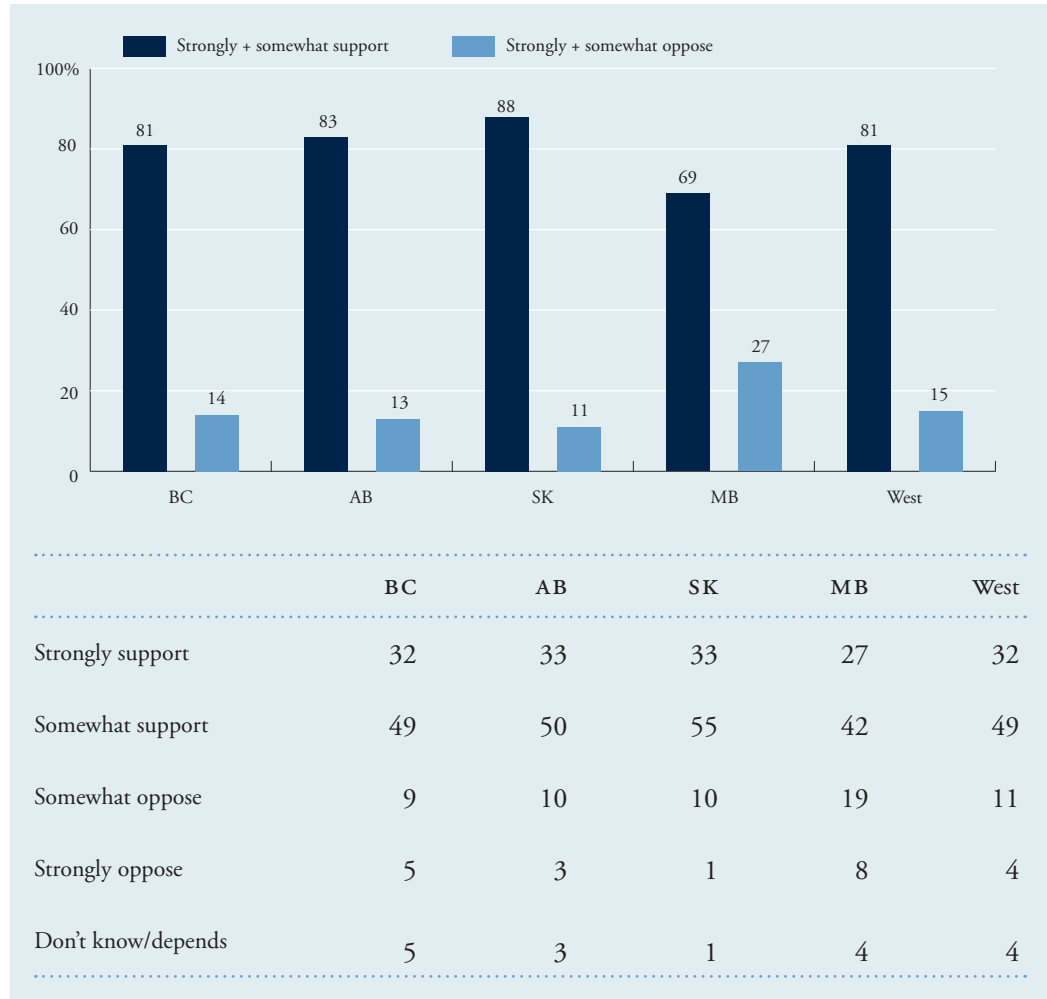
Natural gas is a key commodity in western Canada and is widely used in the region to heat homes and buildings. There is a high level of support for the construction of new natural gas facilities to help meet provincial energy needs with 81% of western Canadians saying that they strongly or somewhat support this option. Those who *strongly* oppose this range from a low of 1% in Saskatchewan to a high of 8% in Manitoba. Manitoba stands out in the region with the lowest level of support (69%). This may reflect the lack of a significant natural gas industry in Manitoba.

Whether or not the support for more natural gas capacity also applies to the development of unconventional natural gas sources such as shale gas and coal bed methane is not possible to determine from these results. What we do know is that the public does not get its hackles up when asked about the expansion of “natural gas” (and the construction of facilities that would go along with this) as an energy source.

Not a lot stands out when the responses of different demographic groups are examined. Westerners aged 60 and over are a little more likely to favour the expansion of natural gas (87%) and people who make between \$20,000 and \$39,999 a year are less likely (71%). Oddly, Calgarians are less likely to support natural gas expansion (76%) than Edmontonians (85%).

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FIGURE 5: SUPPORT FOR CONSTRUCTION OF NEW NATURAL GAS FACILITIES (%)



Survey question: Some people believe further development of natural gas is a good option for meeting our future energy needs because it releases fewer greenhouse gases than coal or oil-fired power. Would you strongly support, somewhat support, somewhat oppose or strongly oppose the construction of new natural gas facilities in [PROVINCE] to help meet the province's energy needs?

Source: Environics Research Group Limited, special survey for the Canada West Foundation. Numbers may not add to 100 due to rounding.

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Nuclear Power

There are no nuclear power facilities in western Canada, but they are a significant portion of the electricity mix in Ontario. Quebec and New Brunswick also utilize nuclear power.

In contrast to natural gas, less than a majority (45%) of westerners strongly or somewhat support the construction of nuclear facilities to help meet provincial energy needs. Just under a majority (49%) are strongly or somewhat opposed. Those who *strongly* oppose the idea outnumber those who *strongly* support it (32% compared to 17%).

There are some large differences among the provinces with a majority of Saskatchewan residents (61%) saying they support the development of nuclear power in their province compared to 41% in BC and 38% in Manitoba. Alberta sits in the middle with 49% supporting nuclear power. The greater level of support in Saskatchewan is likely related to the presence of a major uranium export industry in the province. Public opinion is most opposed in Manitoba (39% strongly opposed) and BC (37% strongly opposed).

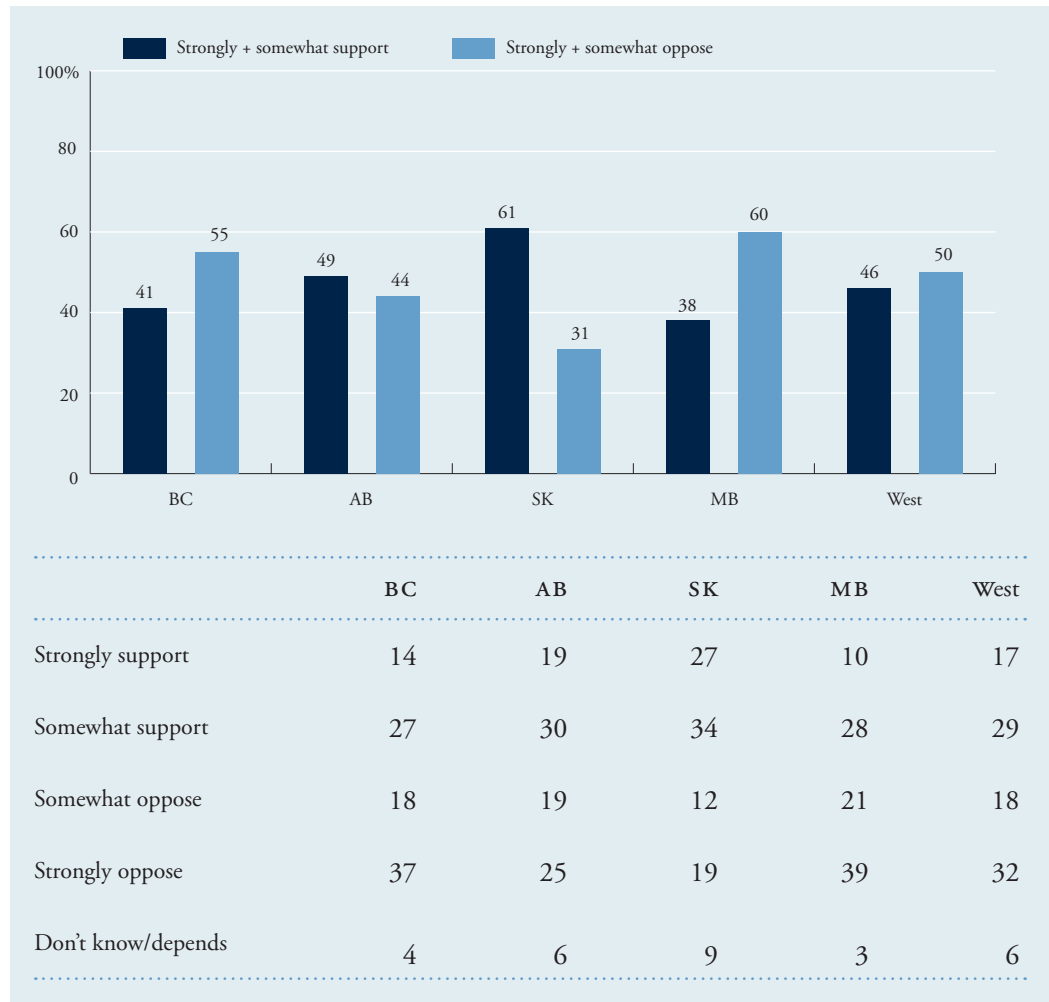
A gender difference is evident in the results with 53% of male respondents saying that they support nuclear power compared to just 38% of female respondents. Those aged 18 to 29 are a little more likely to support the idea of nuclear power (52%) than older westerners.

The results, combined with the passionate voices often associated with the debate about nuclear power, suggest that adding nuclear power to the energy mix in western Canada is a divisive issue with large segments of the public holding divergent views.

The recent damage to nuclear power plants in Japan is likely to have an effect on the nuclear power debate in Canada as public concern about the safety of nuclear power spikes. How deep and how durable this effect will be on public opinion in western Canada will be interesting to watch.

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FIGURE 6: SUPPORT FOR CONSTRUCTION OF NEW NUCLEAR POWER FACILITIES (%)



Survey question: Some people believe further development of nuclear power would be a good option for meeting our future energy needs because it releases no greenhouse gas emissions that contribute to climate change. Would you strongly support, somewhat support, somewhat oppose or strongly oppose the construction of nuclear power facilities in [PROVINCE] to help meet future energy needs?

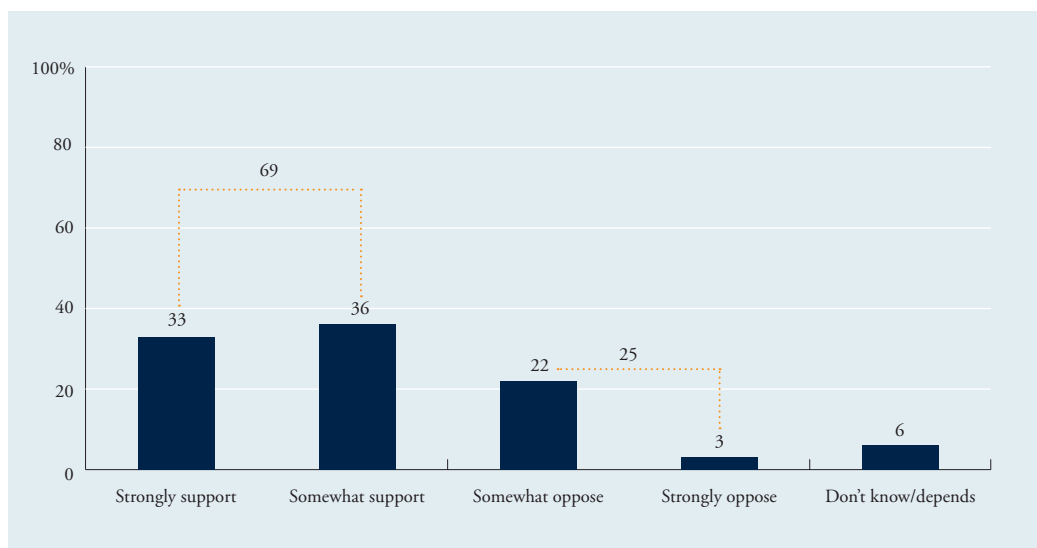
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Uranium in Saskatchewan

Given the abundance of uranium found in Saskatchewan (the province is home to 8.6% of the world’s recoverable uranium reserves and accounts for about a fifth of global production²), a specific question about the expansion of the uranium industry was posed to Saskatchewan respondents. A majority (69%) either strongly support or somewhat support expanding Saskatchewan’s uranium industry. While there is some opposition (25% oppose expansion), only 3% *strongly* oppose a larger uranium industry in Saskatchewan.

FIGURE 7: ATTITUDES TOWARD EXPANDING SASKATCHEWAN’S URANIUM INDUSTRY (%) (SASKATCHEWAN RESIDENTS ONLY)



Survey question: Saskatchewan has a well established uranium industry that provides key materials to nuclear power facilities around the world. Would you strongly support, somewhat support, somewhat oppose or strongly oppose an expansion of Saskatchewan's existing uranium industry? N=300.

Source: Environics Research Group Limited, special survey for the Canada West Foundation. Numbers may not add to 100 due to rounding.

² Robert Roach, 2010. *State of the West 2010: Western Canadian Demographic and Economic Trends*. Figure 126. Canada West Foundation.

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Oil Sands

It is estimated that there are over 170 billion barrels of recoverable oil in the Alberta oil sands. (If we could squeeze every bit of oil out of the oil sands, it is estimated that there is over 2.5 trillion barrels of “ultimate volume in place.”) The recoverable reserves in the Alberta oil sands puts Canada second only to Saudi Arabia on the list of the world’s largest remaining supplies of oil. Most of the recoverable oil from the oil sands will require in-situ recovery methods such as steam assisted gravity drainage (SAGD) rather than surface mining.

Alberta’s oil sands resource has been receiving a great deal of attention in recent years. Some of this attention is due to the positive economic impact of the resource in the form of jobs and investment, but much has been centered around the environmental challenges associated with the resource including greenhouse gas emissions and tailings ponds. This has led to a debate about the costs and benefits of the oil sands and its continued development.

To gauge how western Canadians view the issue, respondents were asked if they consider oil sands development to be *good* for Canada because it is creating jobs and boosting the economy or if they consider it to be *bad* for Canada for environmental reasons. While 13% of westerners said they don’t know, it depends, or that they hold both views equally, most were able to take a clear position, with 58% saying the oils sands are a good thing for Canada and 29% saying that they are a bad thing.

This does not mean that those who value the economic benefits are not concerned about the environmental challenges or that those who put the environment first do not appreciate the economic benefits. What it shows is that a majority of the public favours oil sands development on economic grounds.

As with the debate about nuclear energy, oil sands development often produces strong reactions that tend to polarize the debate. The survey findings indicate that there is indeed support for development of the resource (i.e., that it is “good” for Canada), but they also show that there is a large group of western Canadians who feel that oil sands development is a “bad” thing for Canada. This split in public opinion means that the debate about the future of the oil sands will likely continue to be a divisive one that drives more wedges between people than it removes. Hopefully, as industry gets better and better at addressing the environmental challenges, the debate will focus more on the common ground that exists rather than on what divides public opinion.

The opposition is strongest in Manitoba with 40% of respondents reporting that they view the oil sands as bad for Canada and lowest in Alberta where 19% view the resource in a negative light.

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When we look at the opinions of Canadians outside the West, we find that the opposition to oil sands development is highest in Quebec (57% of Quebec residents view oil sands development as bad for Canada), but that opposition in Ontario (32%) and Atlantic Canada (36%) is more in keeping with opposition in the West (29%).³

Within western Canada, men (62%) are somewhat more likely to say that the oil sands are good for Canada than women (54%). Those 18-29 are less likely to say that the oil sands are good for Canada (52% versus 59%-61% for older age categories) as are people with university degrees (47%) and those without a high school diploma (51%). Interestingly, support increases as income rises with those earning under \$20,000 per year less likely to say oil sands development is a good thing (48%) compared to those making \$80,000 or more per year (64%).

FIGURE 8: DO YOU SEE OIL SANDS DEVELOPMENT AS GOOD OR BAD? (%)

	BC	AB	SK	MB	West
Oil sands development is GOOD for Canada because it is creating lots of jobs and boosting the Canadian and regional economy at a time when some other industries are struggling	54	67	62	45	58
Oil sands development is BAD for Canada, because it is a major source of greenhouse gases that cause climate change and is damaging the environment in other ways	34	19	27	40	29
Hold both views equally	5	5	6	9	5
Depends – both good and bad	3	3	3	3	3
Don't know	4	6	3	4	5

Survey question: Which one of the following views about the Alberta oil sands is closest to your own?

Source: Environics Research Group Limited, special survey for the Canada West Foundation. Numbers may not add to 100 due to rounding.

³ The source for the non-western results is Environics Research Group Limited, Canadian Environmental Barometer. These results were used with the permission of Environics Research Group Limited.

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Pace of Oil Sands Development

Within the debate about the development of the Alberta oil sands, there is a continuum of views regarding what to do to address the issues that have been raised. On one end of the continuum is the call to end all oil sands activity. As Gibbins notes in *Blackened Reputation: A Year of Coverage of Alberta's Oil Sands*, “environmental groups such as Greenpeace, the Sierra Club and the Rainforest Action Network seek to put an end to oil sands extraction entirely. There is little or no interest in conversation or compromise.”⁴ At the other end of the continuum are those who dismiss the concerns raised by the environmental community and argue for a full-steam ahead approach. In the middle is the petroleum industry as it strives to improve environmental performance while developing the natural resource and the economic benefits it yields.

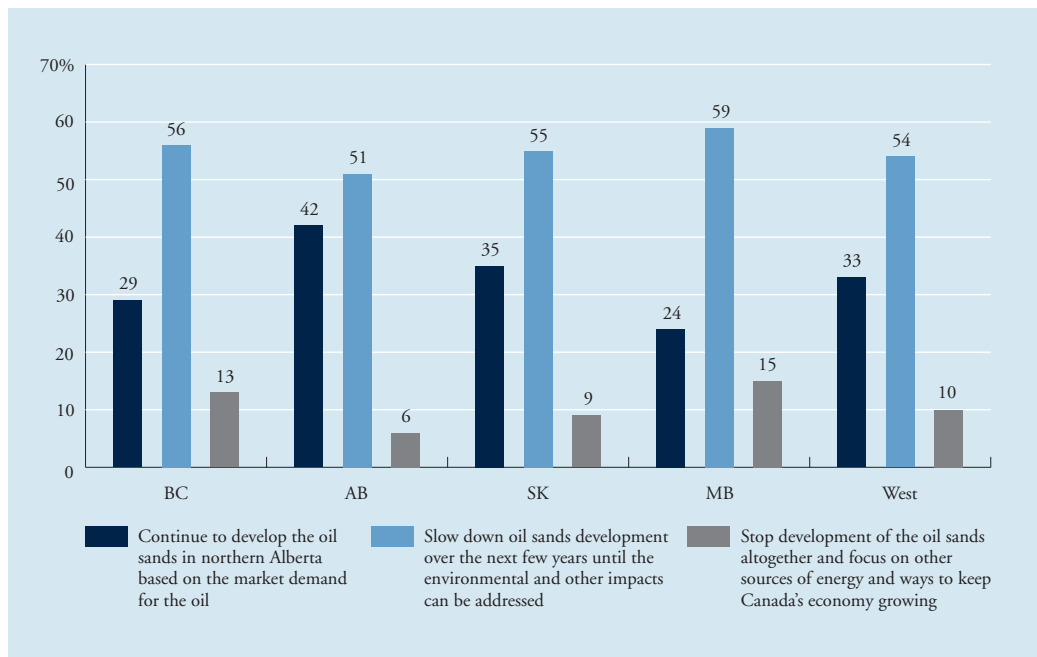
When western Canadians are asked where they sit on this continuum, we find only a small base of support for a moratorium on oil sands development with just 10% supporting this option. A third of the western Canadian public supports the full-steam ahead approach while a majority (54%) favours slowing down development over the next few years until environmental and other impacts can be addressed. This suggests that only a small number of westerners believe that environmental concerns are a sufficient reason to shut down the oil sands (the largest proportion of the population in favour of a shutdown is found in Manitoba at 15% and the smallest in Alberta at 6%). Support for developing the oil sands based on market demand is highest in Alberta at 42% and lowest in Manitoba at 24%.

The results also suggest that a broad swath of the public is anxious to see more action taken to ensure the responsible development of the resource even if it means slowing the pace of development. The perception that more can and should be done persists despite industry efforts to highlight the steps that it has taken to improve its environmental performance.

⁴ Dan Gibbins. 2010. *Blackened Reputation: A Year of Coverage of Alberta's Oil Sands*. Canada West Foundation. Page 8.

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FIGURE 9: ATTITUDE TOWARD THE PACE OF OIL SANDS DEVELOPMENT (%)



Survey question: Which one of the following options for the future of oil sands development would you most favour?

Source: Environics Research Group Limited, special survey for the Canada West Foundation. Numbers may not add to 100 due to rounding.

Edmonton respondents are more likely than Calgary respondents to support development based on market demand (47% compared to 36%) and men are more likely than women to feel this way as well (40% compared to 27%). Only 25% of respondents with a university degree support development based on market forces.

Anti-oil sands sentiment is highest in Quebec with 31% saying that all development should stop. This is followed by Atlantic Canada at 19% and just 16% feeling this way in Ontario.⁵

⁵ The source for the non-western results is Environics Research Group Limited, Canadian Environmental Barometer. These results were used with the permission of Environics Research Group Limited.

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4. Conclusion

In many ways, abundant cheap energy is what defines contemporary life in Canada. From the car and fridge to the computer and air conditioner, modern life would not be the same without electrical sockets in almost every wall and gas to power our combines, trucks, planes, busses, cars, lawnmowers, motorbikes, helicopters, furnaces and factories. Western Canada is lucky in that it has large reserves of fossil fuel and extensive hydro electric capacity.

But, all this energy use makes us worried, too. Will it remain cheap? Will it run out? And what about the effects on the environment? Things like smog and acid rain have dogged the use of fossil fuels for decades and debates about hydro dams, nuclear power plants, and how to make solar power viable have raged for just as long. Concern about global warming and climate change have upped the stakes as governments have declared war on carbon. This puts us—as energy consumers and energy producers, employees and employers, citizens and environmental stewards—in a tough, even hypocritical spot.

The survey results reflect this fundamental tension. We need energy, we want energy, we make money off energy, but we worry that our energy-based lifestyles and economies are spoiling the planet and our health. This points to the critical importance of developing a clear, decisive, collaborative, future-oriented national energy strategy. We need a plan and we need it now.

The public is undecided if this plan should be local, regional or national in orientation. The Canada West Foundation's view is that it needs to come to rest at a national level in order to address energy issues that are not contained by provincial borders. With that said, we agree fully with the sentiment evident in the survey results that a national strategy must be built up from, and take into account, the unique situations and ideas of the many communities, provinces and regions that together form Canada.

It is vitally important to gather and understand public opinion on energy issues, and this report does its small part in service to this larger endeavour. However, there is a constant need to go beyond simply documenting public attitudes. Politicians, think tanks, experts, industry, environmental groups and others must work to inform the public debate, propose options that can overcome the divisions that exist within the public mindset and, at some point, make decisions that will, inevitably, conflict with some segments of the Canadian public.

To this end, the Canada West Foundation's Powering Up for the Future Initiative, of which this report is a part, is attempting to advance a series of ideas such as a national energy strategy and to provide informative analysis and commentary such that both decision-makers and the public they serve will be informed about the nuances of the energy issues facing Canada. More information about Powering Up can be found on the Foundation's website (www.cwf.ca).

Canada West Foundation is 40 years strong!

In 1971 the Canada West Foundation was established to give the people of the West—British Columbia, Alberta, Saskatchewan and Manitoba, a voice for their dreams, interests and concerns. In doing so, the goal was to put the West on the national agenda and be at the forefront of the most important issues and debates.

Since then, the Canada West Foundation has successfully met that goal, proving itself to be one of Canada's premier research institutes. The Canada West Foundation is the only think tank dedicated to being the objective, nonpartisan voice for issues of vital concern to western Canadians.

This year we celebrate 40 years of representing western viewpoints across Canada. We are proud of our accomplishments and know our research and commentary has improved government policy and decision making.

Today the West is in, but we won't stop there. We continue to promote important issues and debates that provide made-in-the-West solutions to national problems and keep the West thriving.

CANADA IS STRONGER WHEN THE WEST IS THRIVING!

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