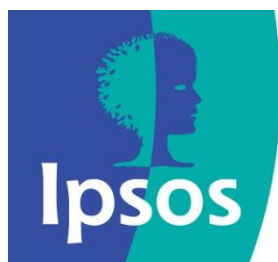


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Prioritize Local Oil Before Importing From Other Countries**  
*Seven in Ten (70%) Think It's Important to Access New Export Markets to  
Reduce Reliance on Exporting to the U.S.*

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**Ipsos Reid**

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**Three-Quarters (75%) of Canadians Believe Oil Refineries Should  
Prioritize Local Oil Before Importing From Other Countries**  
*Seven in Ten (70%) Think It's Important to Access New Export Markets to  
Reduce Reliance on Exporting to the U.S.*

**Toronto, ON** – A new survey conducted by Ipsos Reid on behalf of the Canadian Association of Petroleum Producers (CAPP) reveals that most Canadians believe the country's oil refineries should emphasize using local product before using imported oil from foreign sources.

Three-quarters (75%) 'agree' (40% strongly/34% somewhat) that 'Canadian oil refineries should make it a priority to use Canadian oil before using oil imported from other countries, even if it means transporting oil from Western Canada across the country to the refineries', while just over one in ten (14%) 'disagree' (4% strongly/11% somewhat) and 11% have no opinion.

Seven in ten (70%) 'agree' (29% strongly/41% somewhat) that 'it is important that Canada accesses new markets for oil exports in order to reduce the reliance on exports to the United States, with fewer than one in five (18%) 'disagreeing' (5% strongly/13% somewhat) and 13% having no opinion.

*Majority Support Pipelines in All Directions...*

With crude oil in high demand in all regions, most Canadians appear to be supportive of the use of these pipelines to bring oil across the country, and to export it.

Eight in ten (80%) 'support' (41% strongly/39% somewhat) the use of pipelines to transport oil sands crude oil from Alberta to refineries in Ontario, Quebec, and Atlantic Canada, with just two in ten (20%) 'opposing' (8% strongly/12% somewhat) such a pipeline.

Two in three (66%) 'support' (25% strongly/41% somewhat) transporting oil sands crude oil from Alberta to shipping ports on British Columbia's coast and on to international markets such as Asia, while only one in three (34%) 'oppose' (14% strongly/20% somewhat) the use of pipelines for this purpose.

Six in ten (57%) even 'support' (20% strongly/37% somewhat) the use of pipelines in transporting crude oil from Alberta to refineries in Texas, although four in ten (43%) 'oppose' (18% strongly/25% somewhat) it.

### *Perceptions of Pipeline Transportation...*

Much discussion from increased transportation of natural gas and oil resources revolves around whether this resource has been transported safely.

A strong majority of Canadians think measures currently in place are performing well. Nearly three-quarters (72%) are closer to the opinion that crude oil has been transported safely across Canada for decades, while fewer than three in ten (28%) believe crude oil transportation has proven to be unsafe and should be stopped.

Canadians were provided some statements reflecting the current state of transporting crude oil by pipeline and were asked to gauge whether they made them more or less favourable or had no impact on how they saw the use of pipelines for this transportation. The data reveal that more than six in ten Canadians are more favourable about pipeline transportation of crude oil after hearing them. These include:

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<u>Statement</u>	<u>More Favourable</u>	<u>Less Favourable</u>	<u>*No Impact</u>
Transportation by pipelines produces fewer greenhouse gas emissions than other means of crude oil transport	67%	9%	24%
In 2011, Canadian Energy Pipeline Association companies transported approximately 5.3 trillion cubic feet of natural gas and 1.2 billion barrels of crude oil and refined products and 99.999% of that product made it safely to its destination	63%	10%	27%
For over 60 years, pipelines in Canada have been safely transporting oil and gas products underground with very few incidents	61%	11%	28%
Canadian suppliers and service companies, such as welding, steel manufacturing, construction, information technology and even local hotels and restaurants, are all positively impacted by the pipeline industry	61%	8%	30%

*\*No impact means that the statement did not move those polled positively or negatively*

## *Oil Sands and the Environment*

With much of the debate around the Alberta oil sands focusing on potential environmental effects, most Canadians do think it's possible to develop the oil sands and protect the environment. Two-thirds (65%) 'agree' (20% strongly/44% somewhat) that 'it is possible to produce oil sands while at the same time managing the environmental impacts', while just one in four (25%) 'disagree' (9% strongly/16% somewhat) and one in ten (11%) have no opinion.

A similar proportion (62%) believe that oil sands greenhouse gas emissions represent only a fraction of Canadian greenhouse gas emissions, compared to fewer than four in ten (38%) who believe that greenhouse gas emissions from the oil sands represent a large contributor to all Canadian greenhouse gas emissions.

Most (74%), however, 'agree' (31% strongly/42% somewhat) that 'the oil sands could be doing more to protect the environment', while 13% 'disagree' (2% strongly/10% somewhat) or have no opinion.

Looking at situations 'when the oil sands sector explains how it is helping the environment, they trust they're doing what they say they're doing' a similar proportion of Canadians 'agree' (44%, 9% strongly/35% somewhat) and 'disagree' (42%, 16% strongly/25% somewhat), while 14% have no opinion.

Canadians are also of evenly differing opinions on their agreement on their assessment of the industry's contributions to investing in sustainability. Two in five (41%) 'agree' (7% strongly/34% somewhat) that 'the oil sands sector is doing a good job investing in

environmental sustainability, with a similar two in five (42%) 'disagreeing' (15% strongly/27% somewhat) and one in five (17%) having no opinion.

This difference is mirrored when Canadians think about the sector's commitment to both environmental and economic concerns. Two in five (41%) 'agree' (7% strongly/34% somewhat) that 'the oil sands sector is doing a good job balancing environmental and economic concerns', with a similar proportion (43%) 'disagreeing' (17% strongly/26% somewhat) and one in five (16%) having no opinion.

More than two in five (43%) 'disagree' (15% strongly/28% somewhat) that 'the oil sands sector does more than most other industries when it comes to protecting the environment, which is more than the proportion who 'agree' (37%, 8% strongly/29% somewhat) with this sentiment, while two in ten (20%) have no opinion.

Half (46%) 'disagree' (15% strongly/31% somewhat) with the notion that 'no matter what the oil sands say, they will never believe them and what they say about the environment', outpointing those who 'agree' (38%, 12% strongly/26% somewhat) or have no opinion (16%) on this statement.

When presented with some key statements about the oil sands industry and its impact on Canada's environment, for the most part, a majority indicate they're more favourable to the industry once being presented the information. The table below shows how public opinion breaks down when being shown this information:

<u>Statement</u>	<u>More Favourable</u>	<u>Less Favourable</u>	<u>*No Impact</u>
Oil sands companies are required by law to reclaim all of the land they disturb	64%	10%	25%

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- 5 -

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into a self-sustaining landscape			
Oil sands producers recycle 80-95 per cent of water used for their operations	63%	13%	24%
Canada's oil sands industry has pooled its environmental technology and some \$700 million to find innovative solutions to reduce impacts on air, land and water. This is on top of billions of dollars in research companies are involved in	58%	13%	30%
The oil sands industry is fully funding a new \$50 million-per-year leading environmental monitoring system. The program was developed by federal and provincial government scientists with input from dozens of other scientists across Canada. Oversight is completely independent of industry.	57%	13%	30%
Greenhouse gas emissions associated with every barrel of oil sands crude oil produced were reduced by 26 per cent between 1990 and 2011	56%	13%	31%
Oil sands projects can only withdraw 2.1% of total annual flow from the nearby Athabasca River for their operations. In 2012, companies	44%	21%	35%

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- 6 -

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collectively withdrew 0.6 per cent of the annual river flow			
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*\*No impact means that the statement did not move those polled positively or negatively*

### *Importance of the Oil Sands to the Canadian Economy*

Seven in ten (70%) 'agree' (34% strongly/36% somewhat) that 'the oil sands industry is important to Canada's economy', with just one in ten (14%) 'disagreeing' (5% strongly/9% somewhat) and one in five (16%) having no opinion on the topic.

Half (51%) of Canadians 'agree' (21% strongly/30% somewhat) that they 'are proud of Canada's oil sands sector and their success', twice that of those who 'disagree' (25%, 10% strongly/15% somewhat) with this sentiment or have no opinion (24%).

A majority of Canadians are in agreement with several positive messages about the often-dubbed 'controversial' oil sands including:

- **'Canada's energy sector must be nurtured and developed to stay competitive with other countries'** – 71% agree vs. 13% disagree
- **'Canada's oil sands industry is a great source of high-quality jobs for Canadians'** – 67% agree vs. 15% disagree
- **'Canadians would like to learn more about Canada's oil sands, how they are developed, and the economic impact they have on Canada'** – 65% agree vs. 15% disagree
- **'The oil sands sector's success is Canada's success and contributes to Canada's success economically and politically'** – 62% agree vs. 19% disagree



- **‘The oil sands are one of Canada’s most important natural resources’** – 62% agree vs. 20% disagree
- **‘Canadians are proud of Canada’s collective efforts to continue to find better ways to produce the oil sands’** – 61% agree vs. 19% disagree
- **‘Developing the oil sands is key to the future economic prosperity of Canada’** – 58% agree vs. 24% disagree
- **‘The oil sands sector is one of Canada’s most innovative industries’** – 55% agree vs. 23% disagree
- **‘The success of Canada’s oil sands sector is world leading’** – 54% agree vs. 21% disagree

Thinking about the effect of the oil sands industry on Canada’s economy, Canadians were asked to reflect on a few key statements about the oil sands industry’s impact on the Canadian economy, here’s how Canadian public opinion breaks down on the topic:

<u>Statement</u>	<u>More Favourable</u>	<u>Less Favourable</u>	<u>No Impact</u>
For every direct job created in Alberta’s oil industry, approximately two additional jobs are created in the rest of Canada	65%	9%	26%
Employment in Canada from coast to coast as a result of new oil sands investments is expected to grow from 75,000 jobs in 2010 to 905,000 jobs in 2034	65%	9%	26%
It is estimated that the oil sands industry will purchase roughly \$117 billion dollars in supplies	60%	10%	30%

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and services from Canadian provinces outside Alberta over the next 25 years			
In 2012, oil sands and companies contributed more than \$12 million dollars to Aboriginal communities in local regions for schools and youth programs	53%	13%	33%

### *Debating the Oil Sands...*

The oil sands have frequently made their rounds within Canadian media news sources, but most Canadians agree that much of the debate is centered around rhetoric and should only talk about the facts.

Four in five (77%) 'agree' (46% strongly/30% somewhat) that 'conversations about the oil sands should be based in science and not rhetoric', while just one in ten (7%) 'disagree' (1% strongly/6% somewhat) and one in five (15%) have no opinion. A further three-quarters (74%) 'agree' (42% strongly/32% somewhat) that 'they're tired and turned off by rhetoric from those engaged in debate about the oil sands – they want the facts', with one in ten (9%) 'disagreeing' (2% strongly/7% somewhat) and one in five (17%) citing no opinion.

Two-thirds (65%) of Canadians 'agree' (25% strongly/40% somewhat) that 'they want to learn more about the oil sands and their development', while 14% 'disagree' (3% strongly/11% somewhat) and one in five (21%) have no opinion. An equal proportion (65%) 'agree' (29% strongly/36% somewhat) that 'the focus on the debate about the oil sands should be about how we're going to transport oil across Canada and into other markets,

while two in ten (17%) ‘disagree’ (5% strongly/11% somewhat) and a similar proportion (19%) have no opinion.

Most Canadians are in agreement that the debate about the oil sands should progress to how the resource is developed, not whether it should exist. Three in five (61%) ‘agree’ (31% strongly/30% somewhat) that ‘the debate on whether the oil sands should exist is over and we should move on to how the oil sands should be developed’, with one in five (21%) ‘disagreeing’ (9% strongly/13% somewhat) and another one in five (17%) having no opinion.

Majority (58%) ‘agree’ (22% strongly/36% somewhat) that ‘they’re confident that Canadian industry, and the government, will find the best way to move forward with the oil sands and transportation of oil in Canada’, while one in four (26%) ‘disagree’ (9% strongly/16% somewhat) and one in five (16%) have no opinion.

### *Grading the Oil Sands...*

Canadians were also asked to grade the oil sands industry in a number of areas. The industry receives its best marks when being graded on contributions to the economy, job market, and government coffers, and receives its worst marks when being graded on its ability to protect the environment. The full breakdown is shown below:

<u>Grading Area</u>	<u>‘A’ Grade</u>	<u>‘B’ Grade</u>	<u>‘C’ Grade</u>	<u>‘D’ Grade</u>	<u>‘F’ Grade</u>
Contributing to the Canadian economy and job growth	28%	36%	26%	6%	4%

Contributing to government revenues	27%	34%	29%	5%	4%
Innovation	17%	33%	35%	9%	7%
Making a positive contribution to communities	12%	26%	40%	12%	11%
Protecting the environment	5%	16%	36%	21%	23%

### *Final Thoughts...*

While there has been much debate surrounding Alberta's oil sands, the data reveals that there is positive recognition from coast-to-coast towards the oil sands, ranging from the importance of them as a natural resource for Canada's economy and job creation to an overarching sense of pride felt towards the continuing efforts to find better ways to produce the oil sands.

Canadians appear to be strongly supportive of increasing the use of oil sands domestically, as opposed to relying on foreign oil, and expanding to other markets rather than just relying on traditional trade partners. Most (75% vs. 14% disagree) Canadians acknowledge the need to access new markets access in which production coming from the oil sands should be prioritized by Canadian refineries before using imports from trading partners. There is also a



desire for the Canadian export market to seek out and develop new partnerships so as to reduce reliance on supplying to U.S. markets (70% agree vs. 18% disagree).

A tight majority (53%) 'agree' (20% strongly/33% somewhat) that 'they think, overall, the benefits of development of the oil sands in Canada outweigh the negatives', compared to the fewer than two in five (36%) who 'disagree' (15% strongly/21% somewhat) and one in ten (11%) who have no opinion.

However, the industry has work to do in convincing Canadians that it is doing all it can to reduce the environmental impacts of development, although Canadians seem to be of equally differing opinions in many cases surrounding the oil sands and the environment.

*These are some of the findings of an Ipsos Reid poll conducted between October 17<sup>th</sup> to 22<sup>nd</sup>, 2013 on behalf of the Canadian Association of Petroleum Producers (CAPP). For this survey, a sample of 2,070 Canadians from Ipsos' Canadian online panel was interviewed online. Weighting was then employed to balance demographics to ensure that the sample's composition reflects that of the adult population according to Census data and to provide results intended to approximate the sample universe. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll is accurate to within +/- 2.5 percentage points had all Canadians adults been polled. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.*

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- 12 -

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- 13 -

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