2017 Global Energy Pulse

Ipsos
CAPP CANADA'S OIL & NATURAL GAS PRODUCERS

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Our Canadian Energy Story

The world population is growing. And with more people comes the need for more energy incorporating innovation and technology to discover and develop resources efficiently and responsibly.

The fact is, global energy demand is on the rise. And energy demand drives energy production. The International Energy Agency estimates the world will need 31% more energy in 2040 than we use today. That means more energy for India, China and around the world.

Certainly, our global energy mix is changing. Renewable energy sources will grow significantly in the decades ahead. With the strong commitments governments have made arising from the Paris Agreement, renewable energy supply could double, triple, maybe even quadruple. But even if renewables supply quadruples, it will still only represent about 20% of the world's energy mix.

This means more energy is needed: in all its forms.

Fortunately Canada is blessed with abundant energy resources that are among the largest in the world. We have more than we need – enough to share with the world. We're the fifth largest producer of natural gas in the world and we have the third-largest oil reserves in the world, behind only Saudi Arabia and Venezuela. More than 97% of Canada's oil is in the oil sands.

Around the world, most oil is state-owned and controlled – but Canada has half of all the free-market oil in the world. Canada is politically stable, has some of the strictest environmental regulations and most responsible producers in the world, and is a leader in industry innovation.

We believe the world needs more Canada.

In a growing, uncertain world, Canada can supply the energy for tomorrow, a stable, reliable source of innovative oil and natural gas energy.

This research is an important first step in understanding the extent of our global opportunity and the reception of our energy products. It is important for our industry, for our nation, to establish an index in which to measure trends in knowledge, perceptions and trust to help identify challenges and prospects for growth.

The prosperity of our industry for the benefit of all Canadians depends on our ability to compete on a global energy stage and this research will begin to provide an empirical foundation to be referenced in developing Canada's energy future.

What does the world think?

Despite a bias for "made in my country" energy products, the world is open to more Canadian energy. But our energy story isn't known, providing an opportunity for Canada to shape and influence global mindsets.

CANADA'S ENERGY INDUSTRY REPUTATION CHALLENGES ARE THE SAME CHALLENGES CURRENTLY FACED BY THE GLOBAL INDUSTRY.

There are entrenched camps of supporters and opponents, but there is also a larger group of persuadable citizens who either do not know or cannot say, but are open to learning. We have the opportunity to build on our own national learnings about how to influence perceptions and apply them in a global context. Specifically, four in ten (40%) of global respondents (excluding Canada) say they have a favourable (very/mainly favourable) view of the oil and gas industry and three in ten (31%) say that they trust (trust a great deal/trust a little) the oil and gas industry.

MANY BELIEVE THAT OUR LIVES ARE BETTER TODAY BECAUSE OF WHAT OIL AND GAS HAVE MADE POSSIBLE.

Few believe that it's feasible and practical to use no oil and gas in their lives. We have the opportunity to communicate that the industry is aligned and committed to other global shared values. Specifically,

Given the choice, 31% of respondents across all countries (excluding Canada) agree that they would choose oil and gas imported from Canada, where 54% are neutral/don't know indicating they they could be persuaded to agree.

four in ten (46%) respondents agree (strongly/somewhat) that our lives are better today because of what oil and gas makes possible and half (54%) of global respondents (excluding Canada) say that oil should be a priority (very/somewhat high priority) for meeting the future demand for energy in their country.

CANADIANS HAVE SOME OF THE STRONGEST PERSPECTIVES ABOUT USING OUR OWN RESOURCES OVER IMPORTING FROM ANOTHER A COUNTRY.

There is strong global interest/demand for Canadian energy products over those imported from other countries. The challenge is few know about Canada's environmental innovation story. A focus on innovation is key to underpinning and influencing the persuadable population. Specifically, if given the choice, 75% of global respondents (excluding Canada) generally agree (strongly/somewhat/neither agree nor disagree) that they would choose their own country's oil and gas over oil and gas imported from another country; 68% of Canadians agree with this statement.

Also, if given the choice, 31% of respondents across all 31 countries (excluding Canada) agree that they would choose oil and gas imported from Canada over oil and gas imported from another country. Furthermore, when asked whether they would like to see more or less energy from a group of producing countries, Canada ranks first.

PERCEPTIONS OF POSITIVE ECONOMIC IMPACT OF THE OIL AND GAS INDUSTRY TENDS TO IMPROVE OPINIONS.

Perhaps not surprising, the countries that feel best about oil are those that benefit economically from it. Along with messages that relate to innovation, especially environmental innovation, stories of positive economic impact at the local level is also important to persuade. One third (33%) of respondents (excluding Canadians) agree strongly/somewhat that Canada's oil and gas industry is inventing and using leading-edge technologies to minimize environmental impacts indicating an opportunity to advance narrative for Canadian innovation. In addition, three quarters of respondents (76%) rate the oil and gas industry as either average/slightly above average/well above average when compared with other companies or organizations in contributing to socioeconomic development in communities where it operates.

These are the findings of a unique edition of the Global @dvisor Study, an Ipsos survey conducted between April 10th and 24th, 2017 on behalf of the Canadian Association of Petroleum Producers.

Methodology

The survey instrument is conducted monthly in 25 countries around the world via the Ipsos Online Panel system; this edition of the survey included six additional countries. The countries reporting herein are Algeria, Argentina, Australia, Belgium, Brazil, Canada, Colombia, China, Ecuador, France, Great Britain, Germany, Hungary, India, Israel, Italy, Japan, Mexico, Nigeria, Peru, Poland, Qatar, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey, United Arab Emirates (UAE), United States of America, and Venezuela.

For the results of the survey presented herein, an international sample of 22,000 adults aged 18-64 in the U.S. and Canada, and age 16-64 in all other countries, were interviewed. Approximately 1,000+ individuals participated on a country by country basis via the Ipsos Online Panel with the exception of Peru, Argentina, Colombia, Ecuador, Venezuela, South Korea, Belgium, Poland, Sweden, Hungary, Nigeria, South Africa, Saudi Arabia, Turkey, Israel, Algeria, Qatar, United Arab Emirates, Mexico and Russia, and where each have a sample approximately 500+. The precision of Ipsos online polls are calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points. For more information on the Ipsos use of credibility intervals, please visit the Ipsos website.

In countries where internet penetration is approximately 60% or higher the data output is comparable the general population. Of the 32 countries surveyed online, 18 yield results that are balanced to reflect the general population: Argentina, Australia, Belgium, Canada, Chile, Colombia, France, Germany, Great Britain, Hungary, Italy, Israel, Japan, Poland, South Korea, Spain, Sweden, and United States. The remaining countries surveyed –Brazil (53% Internet penetration among the citizenry), China (46%), India (19%), Mexico (41%), Peru (52%), Russia (59%), Saudi Arabia (59%), South Africa (47%), Ecuador (84%), United Arab Emirates (93%), Qatar (92%), Colombia (62%), Algeria (20%), Nigeria (46%) and Turkey (47%)—have lower levels of connectivity therefore are not reflective of the general population; however, the online sample in these countries are particularly valuable in their own right as they are more urban/educated have income than their fellow citizens and are often referred to as “Upper Deck Consumer Citizens.”

1 Industry Reputation and Regulation

INDUSTRY REPUTATION

In an effort to set the operating context for perceptions of the oil and natural gas industry reputation, respondents across the 32 countries were asked to rate their level of favourability towards seven other sectors.

At a global level, the automotive industry receives the top favourability measure and the lowest stated unfavourable rating compared to each of the sectors.

In Canada, past research has indicated a 2:1 ratio between those who are supportive of industry compared to those who are opposed and as seen below, this trend also exists globally. In fact, there are equal proportions of respondents with favourable perspective of oil and gas as there are those who have a neutral perspective.

Looking at oil and gas specifically, noteworthy regional differences emerge. Respondents in Africa (58%) and the Middle East (56%) provide the highest favourability scores, while those in Australia (20%), Europe (23%), and North America (32%) provide the lowest scores.

It is important to note that just one in five (21%) Canadians provide a favourability score, significantly lower than results from other major producing countries.

FAVOURABILITY BY INDUSTRY (GLOBALLY)

INDUSTRY	VERY/MAINLY FAVOURABLE	NEUTRAL	VERY/MAINLY UNFAVOURABLE
AUTOMOTIVE	52%	39%	9%
WATER UTILITIES	50%	37%	13%
BANKING	48%	32%	20%
ELECTRICITY	47%	34%	19%
NATURAL GAS	45%	42%	13%
OIL AND GAS	40%	40%	21%
MINING	28%	52%	20%

On the question about industry regulation, results highlight that the vast majority of respondents believe that there is currently the right amount or perhaps too much regulation governing each.

Interestingly, there is a similar proportion of respondents across all industries who believe that there is too little regulation, as it stands today. It is important to note that the oil and gas industry, in broad terms, sees similar measurements as compared to the six other competitive industries.

Looking at the key regions surveyed, respondents in European countries were most likely to say that there is too little regulation, across the majority of the industries tested.

REGULATION BY INDUSTRY (GLOBALLY)

INDUSTRY	TOO MUCH	ABOUT RIGHT	TOO LITTLE
AUTOMOTIVE	17%	60%	23%
WATER UTILITIES	14%	59%	27%
BANKING	21%	47%	32%
ELECTRICITY	17%	53%	31%
NATURAL GAS	16%	57%	27%
OIL AND GAS	17%	49%	33%
MINING	13%	51%	36%

The vast majority of global respondents believe that there is currently the right amount or perhaps too much regulation in the oil and gas industry.

2 Industry Attributes

As part of exploring perceptions about the energy sector globally, respondents were asked to compare each industry, oil and gas, mining, and natural gas companies, with other major industries, across 13 key factors of influence.

Globally, oil and gas and natural gas companies are seen to be contributing above average for their economic impact, financial performance, providing high quality products, and contributing to the socioeconomic development in their operating communities.

These sentiments are strongest in regions with healthy oil and gas sectors; Africa and the Middle East providing notably higher scores than European and North American producing countries.

Both oil and gas and natural gas companies see stronger results than the mining industry across most of the 13 attributes tested across most of the 31 countries in this study.

GLOBAL PERSPECTIVES ON KEY INDUSTRY ATTRIBUTES

(TOP 2 BOX - WELL ABOVE/SLIGHTLY ABOVE AVERAGE)	OIL AND GAS	MINING	NATURAL GAS
HAS A POSITIVE IMPACT ON THE ECONOMY IN MY COUNTRY	39%	30%	39%
HAS A STRONG TRACK RECORD OF FINANCIAL PERFORMANCE	38%	26%	34%
PROVIDES HIGH QUALITY PRODUCTS OR SERVICES	32%	24%	34%
CONTRIBUTES TO SOCIOECONOMIC DEVELOPMENT IN COMMUNITIES WHERE IT OPERATES	32%	26%	32%
MAKES SURE HIGH SAFETY STANDARDS ARE MET IN ALL PLACES	31%	23%	34%
IS WELL MANAGED	31%	22%	31%
IS INNOVATIVE	30%	21%	32%
IS AN INDUSTRY THAT I TRUST	29%	21%	32%
IS RESPONSIVE TO THE NEEDS OF CUSTOMERS	28%	20%	30%
HAS A STRONG TRACK RECORD OF CORPORATE SOCIAL RESPONSIBILITY	27%	20%	29%
CHARGES A FAIR PRICE FOR THEIR PRODUCTS/SERVICES	24%	20%	27%
CARES ABOUT THE PLANET AND OUR ENVIRONMENT	22%	18%	29%
WORKS ETHICALLY WITH POLITICIANS AND GOVERNMENT OFFICIALS	21%	17%	23%

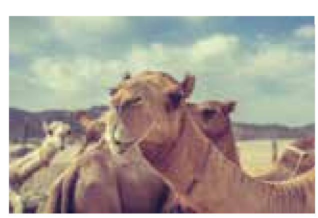
THE OIL AND GAS INDUSTRY HAS A POSITIVE IMPACT ON THE ECONOMY IN:

(TOP 2 BOX - WELL ABOVE/SLIGHTLY ABOVE AVERAGE)

MIDDLE EAST	58%
AFRICA	57%
RUSSIA	53%
ASIA	44%
SOUTH AMERICA	38%
CANADA	35%
NORTH AMERICA	33%
AUSTRALIA	27%
EUROPE	25%

THE OIL AND GAS INDUSTRY HAS A STRONG TRACK RECORD OF FINANCIAL PERFORMANCE:

AFRICA	57%
MIDDLE EAST	54%
RUSSIA	41%
ASIA	37%
CANADA	36%
SOUTH AMERICA	33%
AUSTRALIA	33%
NORTH AMERICA	32%
EUROPE	30%



THE OIL AND GAS INDUSTRY PROVIDES HIGH QUALITY PRODUCTS OR SERVICES:

TOP 2 BOX - WELL ABOVE/SLIGHTLY ABOVE AVERAGE)

AFRICA	53%
MIDDLE EAST	50%
ASIA	37%
RUSSIA	35%
GLOBAL	32%
SOUTH AMERICA	29%
NORTH AMERICA	24%
AUSTRALIA	23%
EUROPE	21%
CANADA	21%

3 Trust

In a digitally connected world, it is important for industry to understand how much credibility and trust citizens have in the voices regularly discussing issues related to the oil and gas sector.

At a global perspective, academics in the oil and gas area are seen to be the most trustworthy (with seven in ten saying that they believe most/some of what they have to say on the topic), followed closely by industry scientists and engineers (six in ten say that they believe most/some of what they have to say on the topic). It is interesting to note that celebrities (actors, musicians) receive only 25% of respondents stating that they are seen to be trusted sources.

Oil and gas representatives (scientists/engineers, oil and gas executives, industry association) see higher trust scores in Africa, Asia, the Middle East, and South America compared to Europe and North America.

GLOBAL PERSPECTIVES ON TRUSTED SOURCES ABOUT THE OIL AND GAS INDUSTRY

TOP 2 BOX (MOST/SOME OF WHAT THEY SAY)

A UNIVERSITY PROFESSOR WHO IS AN EXPERT ON OIL AND GAS ISSUES	69%
A SCIENTIST AND ENGINEER WHO WORKS FOR AN OIL AND GAS COMPANY	59%
AN ENVIRONMENTAL ACTIVIST	56%
A NEIGHBOR OR FRIEND WHO WORKS IN THE OIL AND GAS INDUSTRY	52%
A RESPECTED LOCAL COMMUNITY LEADER	45%
A JOURNALIST	43%
A NATIVE OR ABORIGINAL LEADER	43%
AN INDUSTRY ASSOCIATION THAT REPRESENT OIL AND GAS COMPANIES	40%
AN OIL AND GAS COMPANY EXECUTIVE	39%
THE LEADER OF YOUR COUNTRY	37%

TOP 2 BOX AS ABOVE
A GOVERNMENT OFFICIAL

28%

TOP 2 BOX AS ABOVE
A CELEBRITY (ACTOR, MUSCIAN)

25%

On the question of trust, respondents were asked to focus on two industries specifically: oil and gas and natural gas. As outlined in the measurements below, natural gas companies fare better on this question when looking at the relative sizes of the groups who trust and don't trust this industry. As we've also seen in Canada, the proportions are much closer when it comes to oil and gas companies, with a very small margin between to the groups. It is however very important to note that close to four in ten respondents globally either have a "neutral" perspective or say that they "don't know enough to say"; a significant sized group of citizens to engage and persuade.

When asked whether they trust the oil and gas industry, close to four in ten respondents globally either have a "neutral" perspective or say that they "don't know enough to say"; representing a significant group of persuadable citizens.

GLOBAL PERSPECTIVES ON TRUST IN THE OIL AND GAS INDUSTRY (TRUST/DISTRUST A GREAT DEAL/TRUST/DISTRUST A LITTLE)

	TRUST	NEUTRAL	DISTRUST	DON'T KNOW
NATURAL GAS COMPANIES	34%	36%	22%	7%
OIL AND GAS	31%	34%	29%	6%

When we look at the breakdown by country, respondents living in Nigeria, China, India, Algeria, and Saudi Arabia express the highest levels of trust for oil and gas companies, while those living in France, Spain, Canada, Australia, Belgium, Sweden, Germany, and Great Britain express trust the lowest industry trust measures.

TOP 5 COUNTRIES ON TRUST (TRUST A GREAT DEAL/TRUST A LITTLE) – OIL AND GAS COMPANIES

NIGERIA	55%
CHINA	54%
INDIA	53%
ALGERIA	49%
SAUDI ARABIA	49%

BOTTOM 5 COUNTRIES ON TRUST (TRUST A GREAT DEAL/TRUST A LITTLE) – OIL AND GAS COMPANIES

FRANCE, SPAIN, CANADA, AUSTRALIA	18%
BELGIUM	17%
SWEDEN	16%
GERMANY	45%
GREAT BRITAIN	49%

Trust sentiments about the natural gas industry are markedly different. Those living in China, India, Algeria, Colombia, and Peru have the highest levels of industry trust while respondents in Spain, Canada, Australia, Great Britain, and Germany provide the lowest trust measures.

TOP 5 COUNTRIES ON TRUST (TRUST A GREAT DEAL/TRUST A LITTLE) – NATURAL GAS COMPANIES

CHINA	60%
INDIA	54%
ALGERIA	52%
COLOMBIA	50%
PERU	46%

BOTTOM 5 COUNTRIES ON TRUST (TRUST A GREAT DEAL/TRUST A LITTLE) – NATURAL GAS COMPANIES

SPAIN	23%
CANADA	23%
AUSTRALIA	22%
GREAT BRITAIN	17%
GERMANY	15%

4 Global Energy Literacy and Perceptions

MAIN ENERGY SOURCES IN YOUR COUNTRY

In an effort to assess perceptions about the future state of energy sources globally, respondents were first asked to identify the main sources of energy in their country today.

Globally, two-thirds of respondents identified oil and natural gas as main sources of energy today, followed by hydroelectric and coal.

Interestingly, global citizens grossly over-state the use of renewables, with nearly half of all respondents stating that solar is a main energy source in their country.

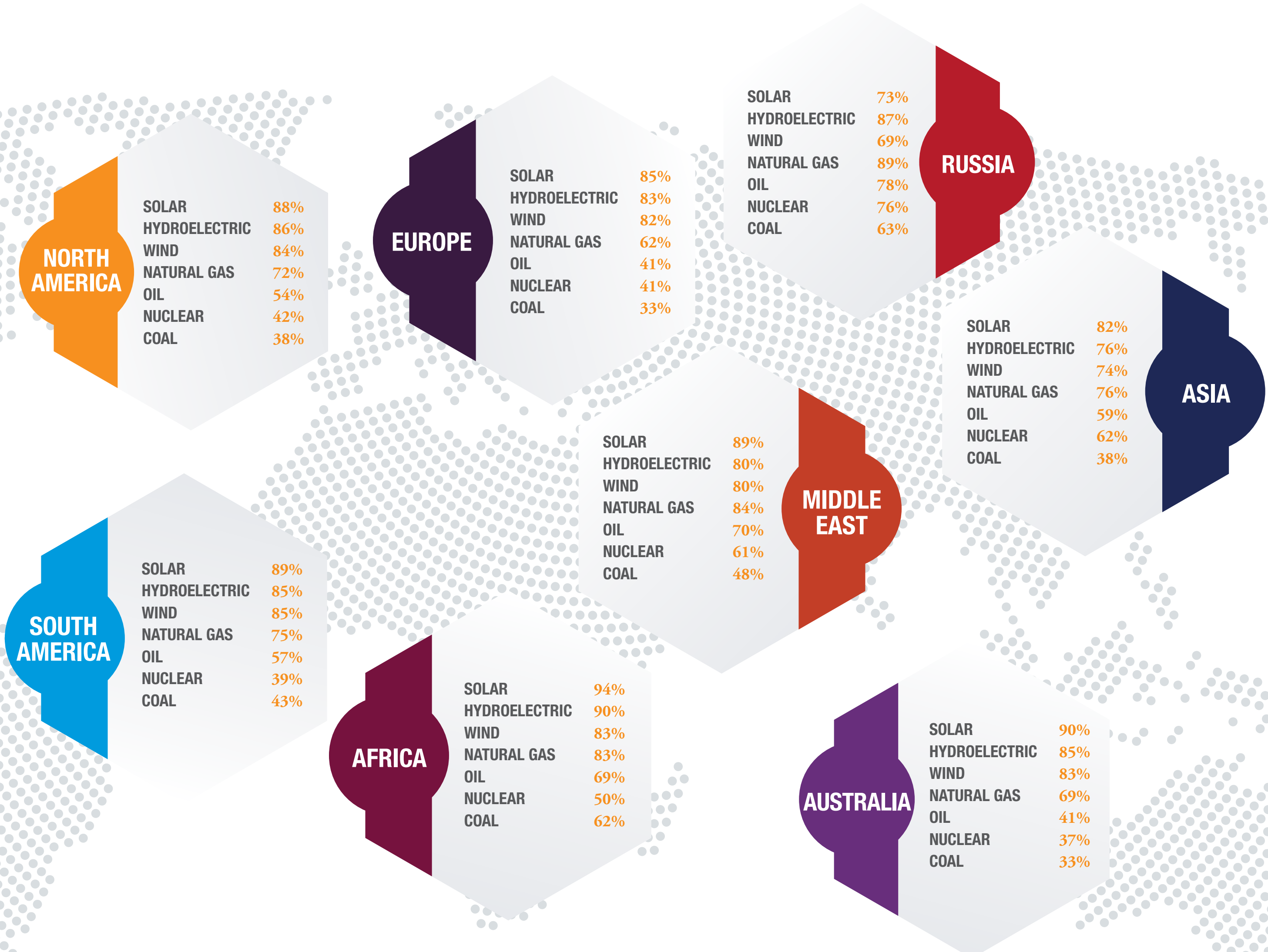
Nearly half of respondents overall have mostly favourable views about seven key energy sources, with renewables (solar and wind) topping the list. Globally, eight in ten respondents say that they have a favourable view about natural gas as an energy source and nearly six in ten share the same perspective about petroleum (oil).

Favourability in natural gas as an energy resource is highest among those living in Israel, Qatar, China, Nigeria and Peru. Canadians rank in the bottom third of countries based on their views about natural gas, with nearly eight in ten who have a favourable perspective.

Respondents living in Saudi Arabia, the UAE, Nigeria, Qatar, and India express the highest favourability scores for oil and gas as an energy resource, while Canadians' scores are at least 30 percentage points lower than these countries.

GLOBAL PERSPECTIVES – TOP 3 BOX (EXTREMELY/VERY/SOMEWHAT FAVORABLE)

SOLAR	96%
WIND	94%
HYDROELECTRIC (INCLUDING DAMS)	92%
NATURAL GAS	82%
PETROLEUM (OIL)	57%
NUCLEAR	54%
COAL	49%



(Top 2 Box. High Priority/Somewhat High Priority)

MEETING FUTURE ENERGY DEMAND

When asked to consider the sources of energy for meeting future demand, renewables (solar/wind) and hydroelectric top the list of "priority" areas, according to over eight in ten respondents globally. Oil and natural gas receive priority scores of higher than 55%, while coal receives the lowest priority rating at four in ten globally. And while there is near universal acknowledgement that renewables should receive the highest priority, those living in North America and Europe are more likely to place emphasis on these energy sources. While those living in the Middle East, South America, and Asia place more of an emphasis on oil and natural gas.

5 Energy Perspectives

Nearly half of global citizens agree that their lives are better today because of what oil and gas makes possible. Respondents living in Africa, the Middle East, Asia, Russia, and North America provided notably higher agreement scores compared to those living in Europe and South America.

On the topic of economic benefits and environmental impacts, four in ten respondents agree that achieving a balance between these elements is possible and a similar proportion of respondents either have a neutral response or do not know enough to say. Measurements are highest among respondents in Africa, the Middle East, Asia, Russia, and North America compared to those in Europe and South America.

There are few who agree with the question that it is feasible and practical that in ten years I will use almost no oil and natural gas in my day-to-day life, with global sentiment consistent at three in ten who agree with the statement.

Climate change plans remain important considerations for four in ten respondents when considering importing energy from other countries.

Respondents, however, are divided when it comes to the industry being sincerely commited and working hard to reduce the amount of greenhouse gases it produces (three in ten agree and a similar proportion disagree). Globally, four in ten respondents provided either a neutral response or say that they don't know enough to say.

There are few, globally, who agree that it is feasible to use no oil or natural gas in their lives.

GLOBAL PERSPECTIVES

	STRONGLY/SOMEWHAT AGREE	NEUTRAL	STRONGLY/SOMEWHAT DISAGREE	DON'T KNOW
I AM MORE LIKELY TO SUPPORT MY COUNTRY IMPORTING ENERGY FROM COUNTRIES THAT HAVE A PLAN TO FIGHT CLIMATE CHANGE.	43%	27%	20%	10%
IT'S POSSIBLE FOR OIL AND GAS DEVELOPMENT TO BALANCE ECONOMIC BENEFITS AND THE ENVIRONMENTAL IMPACTS IN A WAY THAT PEOPLE LIKE ME CAN AGREE WITH.	40%	31%	17%	12%
OUR LIVES ARE BETTER TODAY BECAUSE OF WHAT OIL AND GAS MAKES POSSIBLE.	46%	28%	17%	9%
IT'S FEASIBLE AND PRACTICAL THAT IN TEN YEARS I WILL USE ALMOST NO OIL AND NATURAL GAS IN MY DAY-TO-DAY LIFE.	34%	29%	27%	11%
THE OIL AND NATURAL GAS INDUSTRY IS SINCERELY COMMITTED AND WORKING HARD TO REDUCE THE AMOUNT OF GREENHOUSE GASES IT PRODUCES.	28%	31%	29%	13%

GLOBAL PERCEPTIONS OF CANADIAN ENERGY

A key objective of this research initiative was to understand whether there was global interest in Canadian oil and gas, as well assessing, baseline measurements for the industry's messages about safety and environmental innovation.

Respondents were asked whether they would like to see more or less energy from a group of top producing countries (excluding their country of residence). Looking at responses globally, Canada ranks as the highest country (much/slightly more) of the eleven tested, followed by Saudi Arabia, UAE, the United States, and Kuwait.

A closer look at the countries with the strongest interest in more Canadian energy shows that Israel ranks first, followed by the United States, Algeria, India, and South Africa.

THINKING OF PETROLEUM (OIL), WOULD YOU PREFER TO GET MORE OR LESS OF YOUR ENERGY FROM THIS COUNTRY?

CANADA	24%
SAUDI ARABIA	22%
UAE	21%
UNITED STATES	21%
KUWAIT	21%
VENEZUELA	19%
RUSSIA	18%
IRAQ	18%
NIGERIA	17%
IRAN	16%
CHINA	16%

TOP 10 COUNTRIES PREFERRING MUCH/ SLIGHTLY MORE ENERGY FROM CANADA

ISRAEL	58%
USA	41%
ALGERIA	35%
INDIA	35%
SOUTH AFRICA	33%
GREAT BRITAIN	32%
UAE	30%
PERU	29%
SAUDI ARABIA	29%
CHINA	27%

GLOBAL ATTITUDES ABOUT CANADIAN OIL AND GAS (CONTINUED)

While a minority of respondents agree (strongly/somewhat) with each statement, Canada's energy story remains mostly unknown.

In fact, more than half of respondents globally provide a neutral or don't know enough to say response, while there is a 2:1 ratio of agreement to disagreement among the balance of the survey respondents. Just one-quarter of global respondents agree with the statement about the Canadian industry safety narrative and one third agree with the environmental innovation narrative. Countries with the highest levels of agreement on this narrative include India, Nigeria, China, Peru, and Mexico.

GLOBAL PERSPECTIVES ABOUT THE CANADIAN OIL AND GAS INDUSTRY

	STRONGLY/SOMEWHAT AGREE	NEUTRAL	STRONGLY/SOMEWHAT DISAGREE	DON'T KNOW
GIVEN THE CHOICE, I WOULD CHOOSE CANADIAN OIL AND GAS OVER OIL AND GAS IMPORTED FROM ANOTHER COUNTRY.	31%	35%	15%	19%
CANADA'S OIL AND GAS IS THE SAFEST AND MOST RESPONSIBLY PRODUCED IN THE WORLD.	26%	35%	12%	27%
CANADA'S OIL AND GAS INDUSTRY IS INVENTING AND USING LEADING-EDGE TECHNOLOGIES TO MINIMIZE ENVIRONMENTAL IMPACTS.	33%	31%	11%	25%
CRITICS VIEWS ABOUT CANADA'S OIL AND NATURAL GAS INDUSTRY TEND TO BE MORE ABOUT POLITICAL CONFRONTATION AND DON'T REFLECT THE REALITY OF WHAT'S GOING ON.	27%	36%	13%	25%

CANADA'S OIL AND GAS INDUSTRY IS INVENTING AND USING LEADING EDGE TECHNOLOGIES TO MINIMIZE ENVIRONMENTAL IMPACTS (STRONGLY/SOMEWHAT AGREE)

INDIA	49%	PERU	44%
NIGERIA	46%	MEXICO	43%
CHINA	46%		

THE CANADIAN PERSPECTIVE

Looking specifically at Canadian responses, we continue to see data that reinforces that there are groups of core supporters and core opponents, with the majority of the population between these two perspectives.

In fact, Canadians rank third in terms of wanting domestic energy products over those imported from another country.

GIVEN THE CHOICE, I WOULD CHOOSE OIL AND GAS FROM MY OWN COUNTRY OVER OIL AND GAS IMPORTED FROM ANOTHER COUNTRY.

Top 2 Box (Strongly/ Somewhat agree)

VENEZUELA	72%	CANADA	68%
RUSSIA	70%	ALGERIA	67%
MEXICO	68%		

Similar to results at a global perspective, there is still work to be done when it comes to getting the industry's energy story out to Canadians. While, like the rest of the world, few Canadians disagree that their lives are better today because of what oil and gas has made possible, only three in ten agree that the industry is sincerely committed and working hard to reduce the amount of greenhouse gases it produces.

Canadians are generally pragmatic when it comes to the concept of balancing economic benefits and the environmental impacts of oil and gas development, with over four in ten agreeing that balance is achievable. And a majority of Canadians do not believe that it is feasible and practical that in ten years they will use almost no oil and natural gas in their day-to-day lives. Both results reinforce the need to bolster national awareness of the industry's work around safety and environmental innovation.

CANADIAN ATTITUDES ABOUT CANADIAN OIL AND GAS

	STRONGLY/SOMEWHAT AGREE	NEUTRAL NEUTRAL	STRONGLY/SOMEWHAT DISAGREE	DON'T KNOW DONT KNOW
I AM MORE LIKELY TO SUPPORT MY COUNTRY IMPORTING ENERGY FROM COUNTRIES THAT HAVE A PLAN TO FIGHT CLIMATE CHANGE.	48%	29%	8%	15%
IT'S POSSIBLE FOR OIL AND GAS DEVELOPMENT TO BALANCE ECONOMIC BENEFITS AND THE ENVIRONMENTAL IMPACTS IN A WAY THAT PEOPLE LIKE ME CAN AGREE WITH.	43%	32%	15%	9%
OUR LIVES ARE BETTER TODAY BECAUSE OF WHAT OIL AND GAS MAKES POSSIBLE.	48%	28%	16%	8%
IT'S FEASIBLE AND PRACTICAL THAT IN TEN YEARS I WILL USE ALMOST NO OIL AND NATURAL GAS IN MY DAY-TO-DAY LIFE.	32%	28%	32%	8%
THE OIL AND NATURAL GAS INDUSTRY IS SINCERELY COMMITTED AND WORKING HARD TO REDUCE THE AMOUNT OF GREENHOUSE GASES IT PRODUCES.	34%	25%	28%	13%

Canada's Opportunity: What's Next?

Summary by CAPP

CAPP CANADA'S OIL & NATURAL GAS PRODUCERS

In a growing, uncertain world, Canada is poised to supply the energy for tomorrow - offering developing countries a stable, reliable source of responsibly developed and environmentally innovative oil and natural gas.

As we look to examine how best to position Canada's place in the world's energy future, the results from this research are valuable and based on the data, provide three primary focus areas for our oil and gas industry:

1. CANADIAN OIL AND NATURAL GAS IS NOT DISADVANTAGED ON THE WORLD STAGE.

The challenges our oil and gas industry faces at home are the same around the world. Just like our citizens, the world has expectations of us. Trust in our industry is important and according to this research, we can provide the credible, expert voices to engage on energy issues.

Canada's oil and gas industry is well positioned; our work in strengthening the industry's reputation at home can be applied when engaging citizens in other countries.

2. THERE IS A GLOBAL PREFERENCE FOR CANADIAN OIL AND NATURAL GAS.

The research clearly shows that if given a choice, the world is open to more Canadian energy imports. Canada is well positioned to support the world's energy needs as our story is centred on political stability, strict environmental regulations and a commitment to being a responsible producer, which is underpinned by our industry's leading-edge innovation.

The world wants more Canada, giving us a solid place to build from in the world's energy future.

3. THE STORY OF INNOVATION AND ENVIRONMENTAL PERFORMANCE IN OUR ENERGY SECTOR IS EMERGING, AND THE WORLD IS OPEN TO HEARING MORE.

Our challenge will be ensuring our energy story is told and understood. The world wants its producers to have a climate change plan; we have one. They want to know the energy being brought into their countries is developed responsibly and from sources that are innovating and focussed on minimizing environmental impacts; Canada is already doing this.

Canada is able to supply the world's energy for tomorrow, and we need to reinforce our story of commitment and innovation with countries seeking our products.

The results of this research are important and we are looking forward to providing this empirical foundation to help build upon and solidify Canada's energy future for the benefit of all Canadians.

Sponsors Overview

ABOUT IPSOS PUBLIC AFFAIRS

Ipsos Public Affairs is a non-partisan, objective, survey-based research practice made up of seasoned professionals. We conduct strategic research initiatives for a diverse number of Canadian American and international organizations, based not only on public opinion research, but elite stakeholder, corporate, and media opinion research.

Ipsos has media partnerships with the most prestigious news organizations around the world. In Canada, Ipsos Public Affairs is the polling partner for Global News. Internationally, Ipsos Public Affairs is the media polling supplier to Reuters News, the world's leading source of intelligent information for businesses and professionals. Ipsos Public Affairs is a member of the Ipsos Group, a leading global survey-based market research company. We provide boutique-style customer service and work closely with our clients, while also undertaking global research.

ABOUT IPSOS

Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. Ipsos ranks fourth in the global research industry.

With offices in 89 countries, Ipsos delivers insightful expertise across five research specializations: brand, advertising and media; customer loyalty; marketing; public affairs research; and survey management.

Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.

Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,782.7 million in 2016.

CAPP CANADA'S OIL & NATURAL GAS PRODUCERS

ABOUT CAPP

The Canadian Association of Petroleum Producers (CAPP) represents companies, large and small, that explore for, develop and produce natural gas and crude oil throughout Canada. CAPP's member companies produce about 80 per cent of Canada's natural gas and crude oil. CAPP's associate members provide a wide range of services that support the upstream crude oil and natural gas industry.

Together CAPP's members and associate members are an important part of a national industry with revenues from crude oil and natural gas production of about $120 billion a year. CAPP's mission, on behalf of the Canadian upstream crude oil and natural gas industry, is to advocate for and enable economic competitiveness and safe, environmentally and socially responsible performance.

Competitiveness, in North America and globally, is vital so as to attract the capital necessary to grow production and expand markets to deliver value to the Canadian public and to our investors. Public confidence, from governments, Aboriginal Peoples, the public, stakeholders and the communities in which we operate, will be determined by our collective performance and the effectiveness of our communications and outreach.

CANADA'S OIL & NATURAL GAS PRODUCERS

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