

Memorandum

To: Canadian American Business Council
From: Todd Vitale
Date: June 21, 2006
Re: Executive Summary – Survey of 1000 “Likely” 2006 U.S. General Election Voters

Vitale & Associates is pleased to present an executive summary of findings from a nationwide survey using telephone interviews conducted with N=1000 “likely” 2006 general election voters across the nation. Responses to this survey were gathered June 13-15, 2006 and the confidence level associated with a survey of this type is 95% with a $\pm 3.1\%$ margin of error.

This survey of U.S. voters reveals a distinct lack of awareness among respondents regarding Canada’s prominence as the number one crude oil supplier to the US. Yet, the survey also indicates that Americans view Canada in a very favorable light. Specifically, on the topics of oil supply and national security, American voters strongly acknowledge the connection between these issues. In fact, they are not hesitant to support certain infrastructure projects in pursuit of more Canadian-based oil supply. Moreover, while not a majority, a significant subset of respondents is willing to pay higher consumer prices to improve American security by replacing oil from unstable regions with Canadian oil.

Key Findings

- An overwhelming majority of American voters (96%) cannot identify Canada as the largest supplier of crude oil to the United States. Saudi Arabia (38%) is most commonly identified by respondents, followed by Iraq (14%) and Iran (8%). Another 6% name the “Middle East” region as the largest supplier of oil to the U.S., such that 66% of American voters point to Mid-East countries as the dominant U.S. supplier.
- Despite a lack of knowledge about Canada’s prominent role as the leading oil supplier to the U.S., a strong majority of Americans hold favorable views toward their northern neighbor. A decisive 88% of those surveyed report feeling “favorable” towards Canada, and over half of those polled (54%) fall into the “strongly favorable” category. In fact, less than 2% of survey respondents report “strongly unfavorable” views towards Canada, revealing a virtually unanimous positive impression of Canada among Americans. This positive attitude towards Canada extends to every voter subgroup.
 - The strongest positive feelings about Canada come from New England (61% strongly favorable), the Mountain (62%) and the Pacific States (62%).
- A strong majority of American’s surveyed believe a reliable oil supply to be critically important to maintaining U.S. national security (71% most/very important / 29% not very important).
 - The sub-groups of survey respondents who show decreased certainty on this issue do not constitute a cohesive group. Those surveyed from the Pacific states and those who identify themselves as being independent in terms of party affiliation show a reduced tendency (62% of each group) to believe oil supply to be very important to national security.

- The majority of survey respondents also express support for eased pipeline construction that would deliver more Canadian oil to the US. Specifically, an overall majority of 70% express favorable sentiments, and a plurality of 40% of respondents “strongly favor” a project of this nature.
 - The sub-groups less likely to be supportive of the project are similar to those that find oil to be less important to national security than other groups: those surveyed in the Pacific states and those who consider themselves as unaffiliated with a political party.
- Given recent price increases, likely general election voters indicate a greater willingness to absorb higher gas prices than might be expected. Responses on this question were split between those who agree (41%) and disagree (50%) with a proposal to replace oil from unstable regions with oil from Canada, even if doing so would result in higher consumer prices. In the context of a very cost-conscious history concerning gasoline among American consumers, this implies that, for a significant number of likely voters, sensitivity related to issues of national security and/or foreign policy indeed trump concerns about gas prices.
 - A major driver on this question is age, with 18-44 years old (37% favor/57% oppose) much more likely to oppose this idea than voters over 45 years old (44%/47%) who are nearly evenly divided.

Conclusion

- The survey found the following basic core attitudes among respondents:
 - Canada is viewed in an overwhelmingly favorable light.
 - An exceedingly small minority is aware that Canada is the largest foreign supplier of oil to the U.S.
 - A very strong majority connects overall U.S. economic and military security with maintaining reliable and secure oil supply.
 - Given the opportunity to assess a somewhat generic proposal on pipeline construction, likely voters expressed significant support for congressional action to increase Canadian oil exports to the U.S.
 - Despite the current high level of gas prices, a meaningful amount of support exists for improving U.S. energy security through increased imports of relatively more stable Canadian oil, even if such a policy would raise consumer prices.

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