

The below email (with enclosed attachments) was sent to the following recipients on March 22, 2023:

- Amanda Coletta, *Washington Post*
- Paul Vieira, *Wall Street Journal*
- Ian Austin, *New York Times*

From: Maryscott Greenwood
To: XX
Date: 3/22/2023
Subject: New data on how Americans view Canada and Energy Security

Good morning. As you may recall, we work with the Province of Alberta in DC.

In advance of the Canada/US official visit later this week, we thought you might be interested in new research conducted by our colleagues at JDA Frontline which surveyed US voters to understand how they view bilateral relationship.

Attached you will find a memo and deck on the survey detailing American views on an array of issues – economy, energy, environment, etc.

If you would like to talk further with the folks that conducted the research, please reach out to Annalyse Keller, Senior Director of JDA Frontline, copied on this email.

Kind regards,

Scotty

maryscott.greenwood
managing director

Calgary, London UK, Ottawa, Toronto, Washington DC

Note: this material is distributed by JDA Frontline and Crestview Strategy US on behalf of the Canadian Province of Alberta. Additional information is available on the DOJ website.



This material is distributed by JDA Frontline on behalf of the Canadian Province of Alberta. Additional information is available at the Department of Justice, Washington, DC

To: Interested Parties
Date: March 21, 2023
Re: U.S. Voter Public Opinion Survey on Energy Security & Economic Partnership

Later this week, Canada and the United States will hold a series of bilateral meetings while President Joe Biden makes his first visit to Canada as president to meet Prime Minister Justin Trudeau.

Recently, the Province of Alberta conducted a survey of U.S. voters to understand how they viewed America's relationship with Canada and the Province. The survey also explored how Americans viewed a number of issues relating to the trading relationship between the two nations.

POLLING METHODOLOGY:

- Field Dates: 2-14-23 to 2-20-23 / Sample: U.S. National online; self-verified voters / Sample Size: 1000 participants; n = 300 Opinion elite oversample / Margin of Error: +/-3.1%
- Our voter sampling took care to mirror nationwide ideological and geographic distribution, as well as proportional representation along key demographics such as age, income, education, ethnicity, gender, and community type.

KEY DATA INSIGHTS:

- Energy security matters for Americans.
- Canada, and Alberta specifically, are seen as a trusted trade partners that provide the U.S. with reliable energy and critical minerals in an environmentally friendly way that does not undermine national security.
- American voters would prefer to import energy from Canada than from any other country.

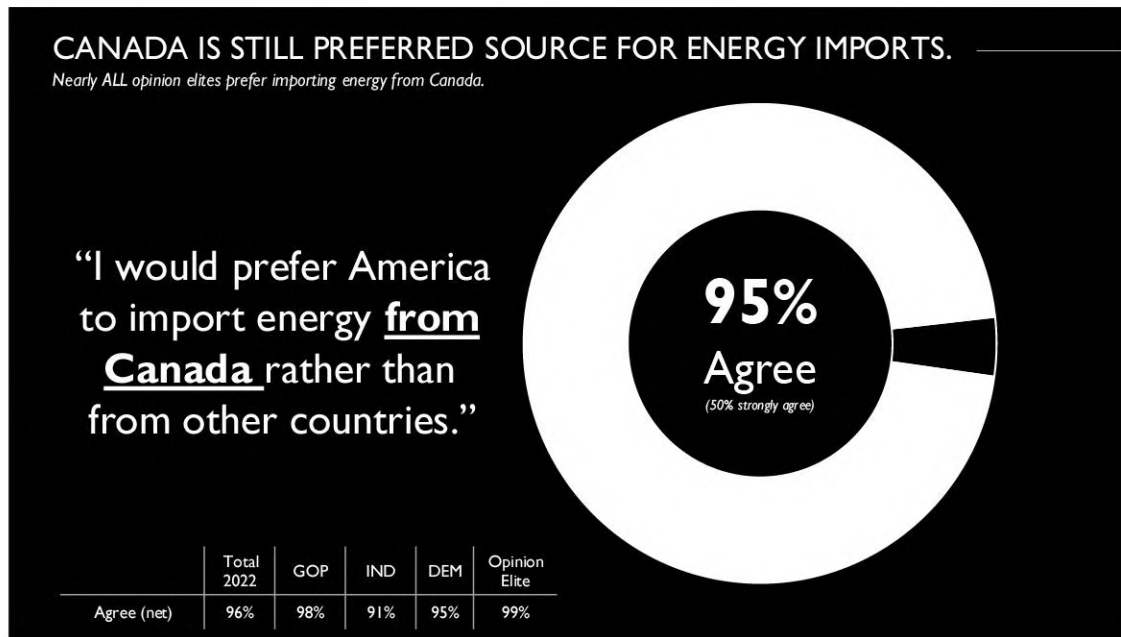
DETAILED FINDINGS:

1. **Americans care where their energy is sourced.** Bipartisan majorities view Canada as the most environmentally friendly source of energy and critical mineral imports. Americans also agree that energy imports from Canada maintain American national security more than imports from any other country.

Consider that Americans overwhelmingly agree with the following statements:

- a. "It matters which country we import energy from."
(92% 2023 agreement, up 4% from 2022; including 92% of Republicans and 97% of Democrats)
- b. "It matters to me which countries we import critical minerals from for batteries."
(91% 2023 agreement; including 91% of Republicans and 93% of Democrats)
- c. "I would prefer America to import energy from Canada rather than from other countries."
(95% 2023 agreement; including 98% of Republicans and 95% of Democrats)
- d. "America can still be energy independent while importing oil from Canada."
(Two-thirds 2023 agreement; including 57% of Republicans and 76% of Democrats)

March 2023



2. **Canada – and specifically Alberta’s vast energy resources – are seen as an answer to current geopolitical instability in the energy market due to Russia’s war on Ukraine.** There is near-unanimous bipartisan agreement that due to “Russia’s war in Ukraine raising energy costs and threatening the global energy supply, it’s more important than ever to have safe, stable, secure and reliable energy trading partners like Canada.”

In fact, 91% of respondents including extremely strong bipartisan majorities agree that increased trade with Canada supports American energy security in a time of global energy scarcity.

3. **Americans choose Canada as a source of environmentally friendly energy that supports U.S. national security.** Two-thirds of respondents choose Canada as the top country which the United States can import energy from, while retaining a high degree of national security. The next highest response is Mexico with less than half as many votes.

Roughly half of respondents choose Canada as the country which the United States can import energy from in the most environmentally-responsible manner. In fact, Canada is statistically tied with the United States when it comes to perceptions of having the best record on protecting the environment. Opinion Elite audiences (more educated, politically active, and informed) are much more likely to view Canada as having the very best record on protecting the environment when compared to any other country, including the United States.

4. **Americans see clear benefits of increased energy trade with Canada.** Canadian energy imports and trade represent economic and environmental benefits. Voters believe that Canada is a trusted and valuable partner in North American energy security.

This material is distributed by JDA Frontline on behalf of the Canadian Province of Alberta. Additional information is available at the Department of Justice, Washington, DC

MESSAGING SURVEY

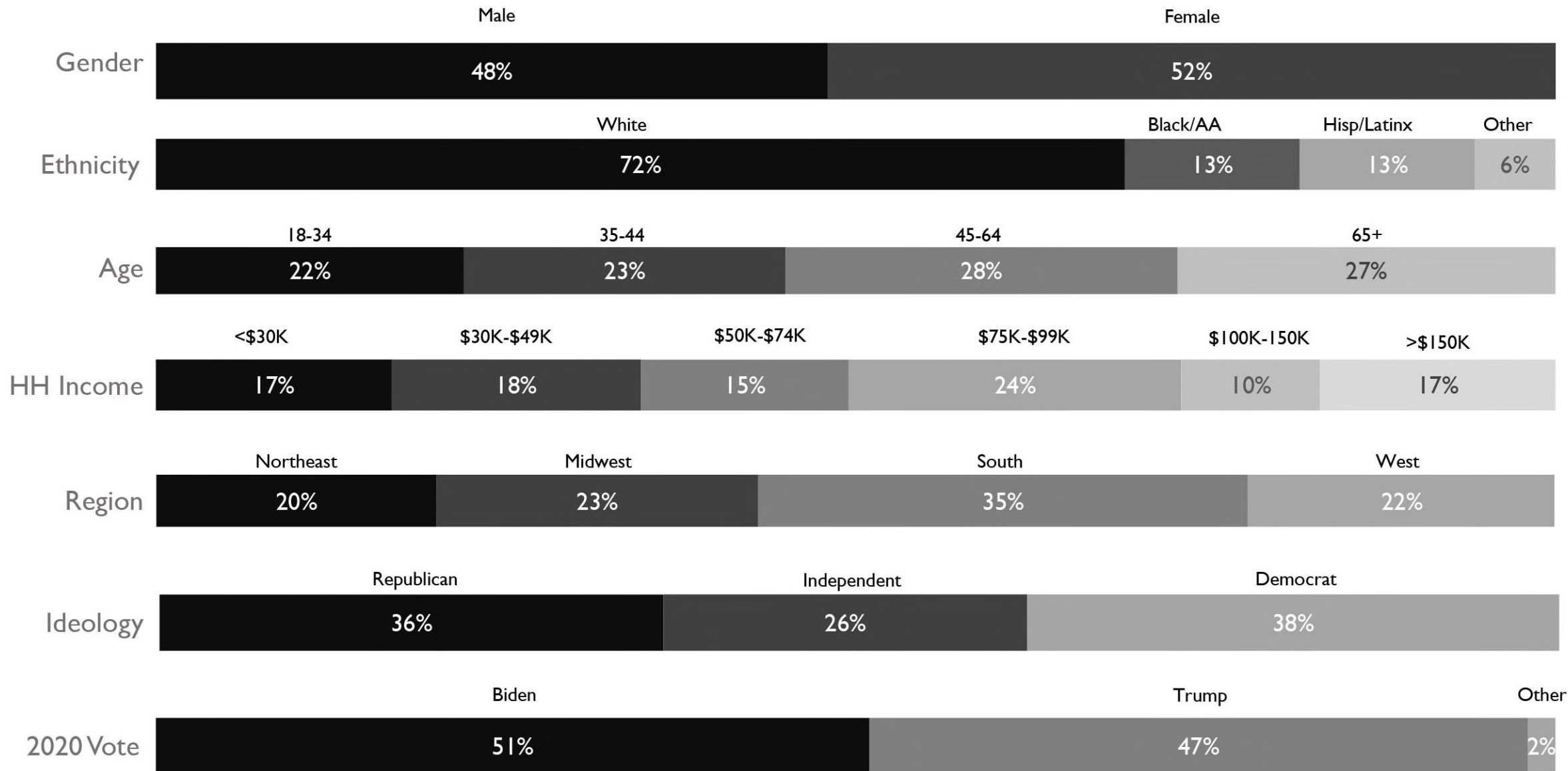
PUBLIC OPINION RESEARCH RESULTS
FEBRUARY 2023

*N = 1000 Registered & Likely Voters
N = 300 Oversample of Opinion Elite
M.o.E = +/-3.1%
2-14-23 to 2-20-23*



QUANTITATIVE: NATIONAL VOTER SAMPLE BREAKDOWN: N=1000

(N = 1000 National Voters / N=300 Opinion Elite Oversample | Fielded 02-14-2023 to 02-20-2023 | M.o.E +/- 3.1%)



INSIGHT



Energy security is an important issue for voters. 81% of voters will consider energy security in their votes for the 2024 election, and 92% believe that energy trade relationships with Canada are critical to establishing energy security due to worldwide events.



U.S. voters would prefer to import energy from Canada than any other country. Canadian imports are best for national security, energy security and environmental reasons.



Becoming energy independent is important for many voters. Two-thirds of voters believe that America can still be energy independent if importing oil from Canada.



In terms of issues, voters are currently most concerned with inflation. But concerns about energy security have risen significantly over the last year. Increased energy trade from Canada creates key economic and environmental benefits.

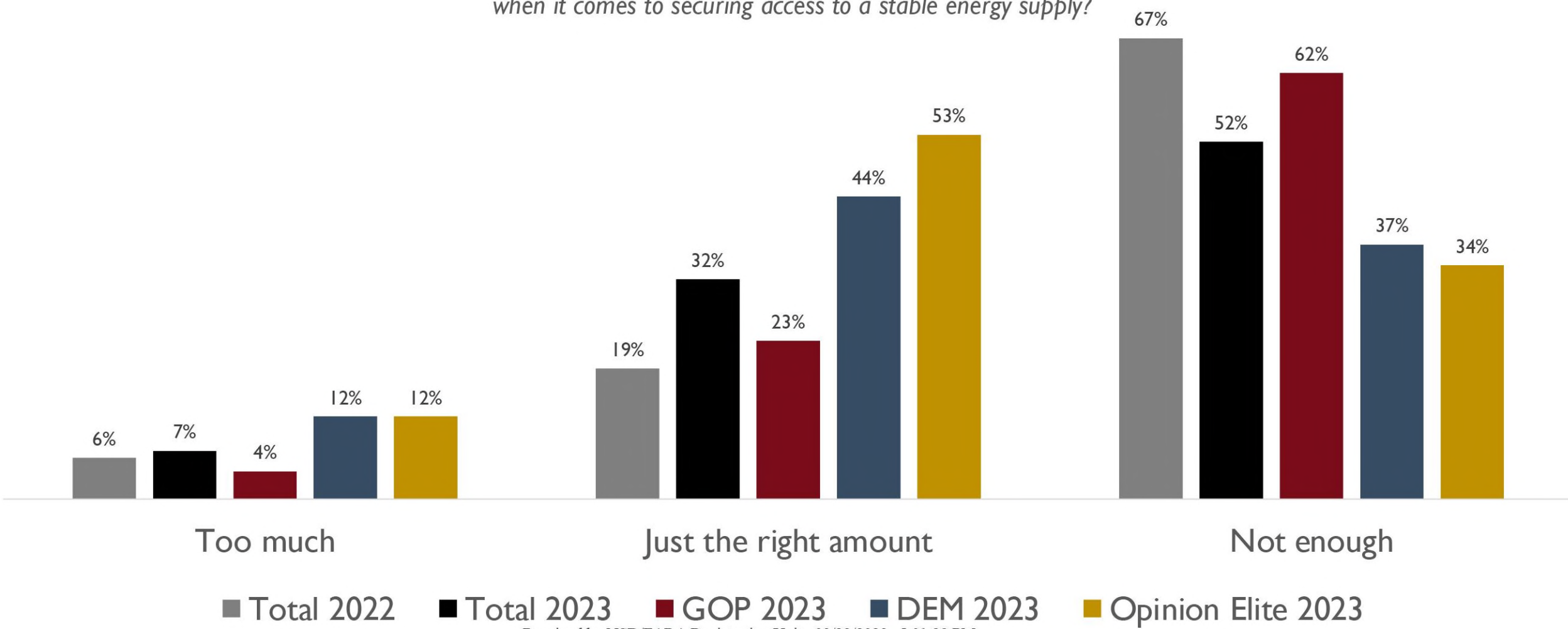
PERCEPTIONS OF ENERGY SECURITY



SOME IMPROVEMENT ON ENERGY SUPPLY BUT STILL MORE TO DO.

Perception of how much the U.S. is doing to secure a stable energy supply has improved since last year.

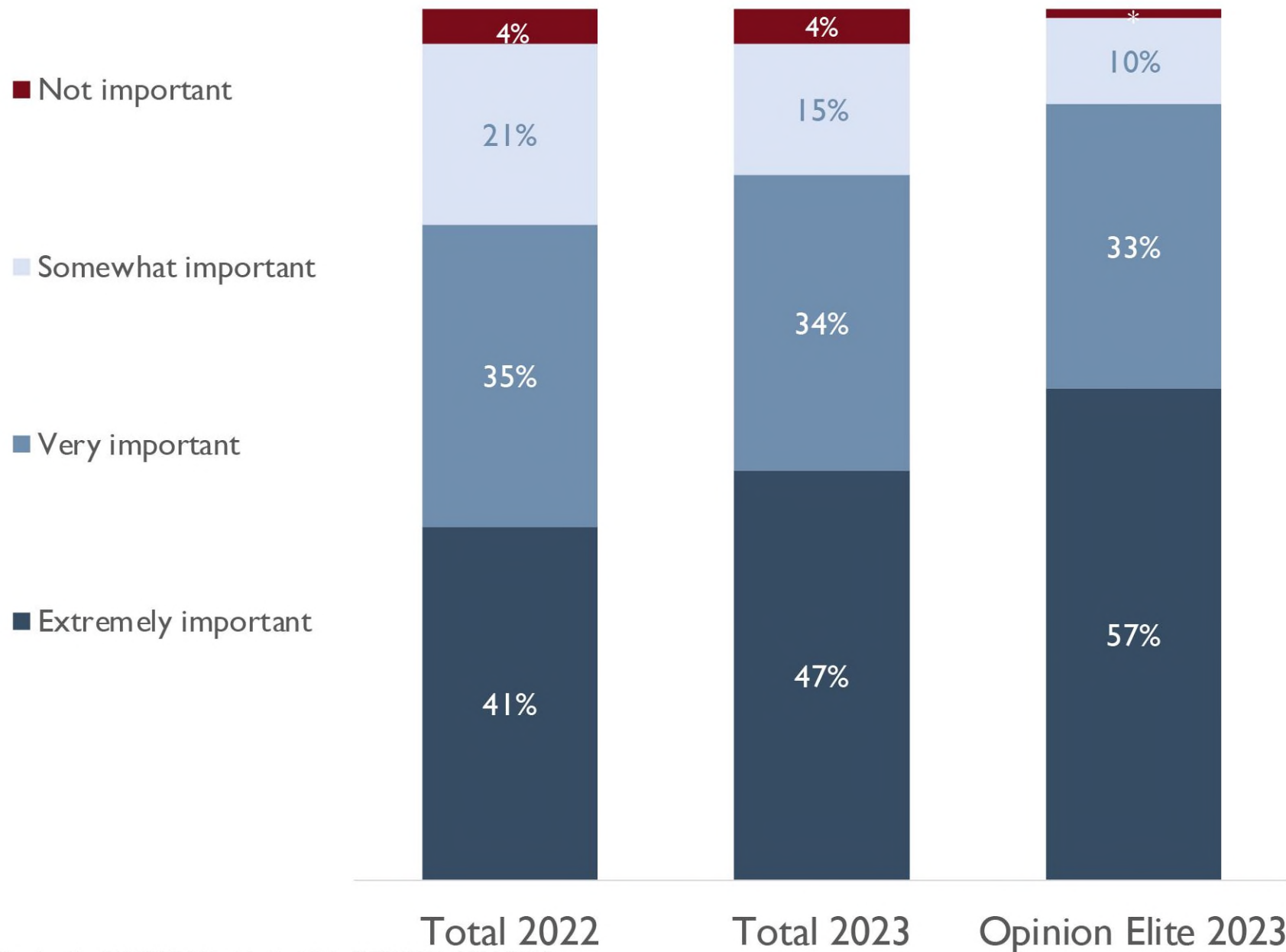
Do you think the United States is doing too much, not enough, or just the right amount when it comes to securing access to a stable energy supply?



81%

say that energy security will be either extremely or very important to their vote in the Presidential election. This is up in importance from the Midterm election and is especially pronounced among opinion elites.

How important is energy security to your vote in the upcoming 2024 Presidential election?



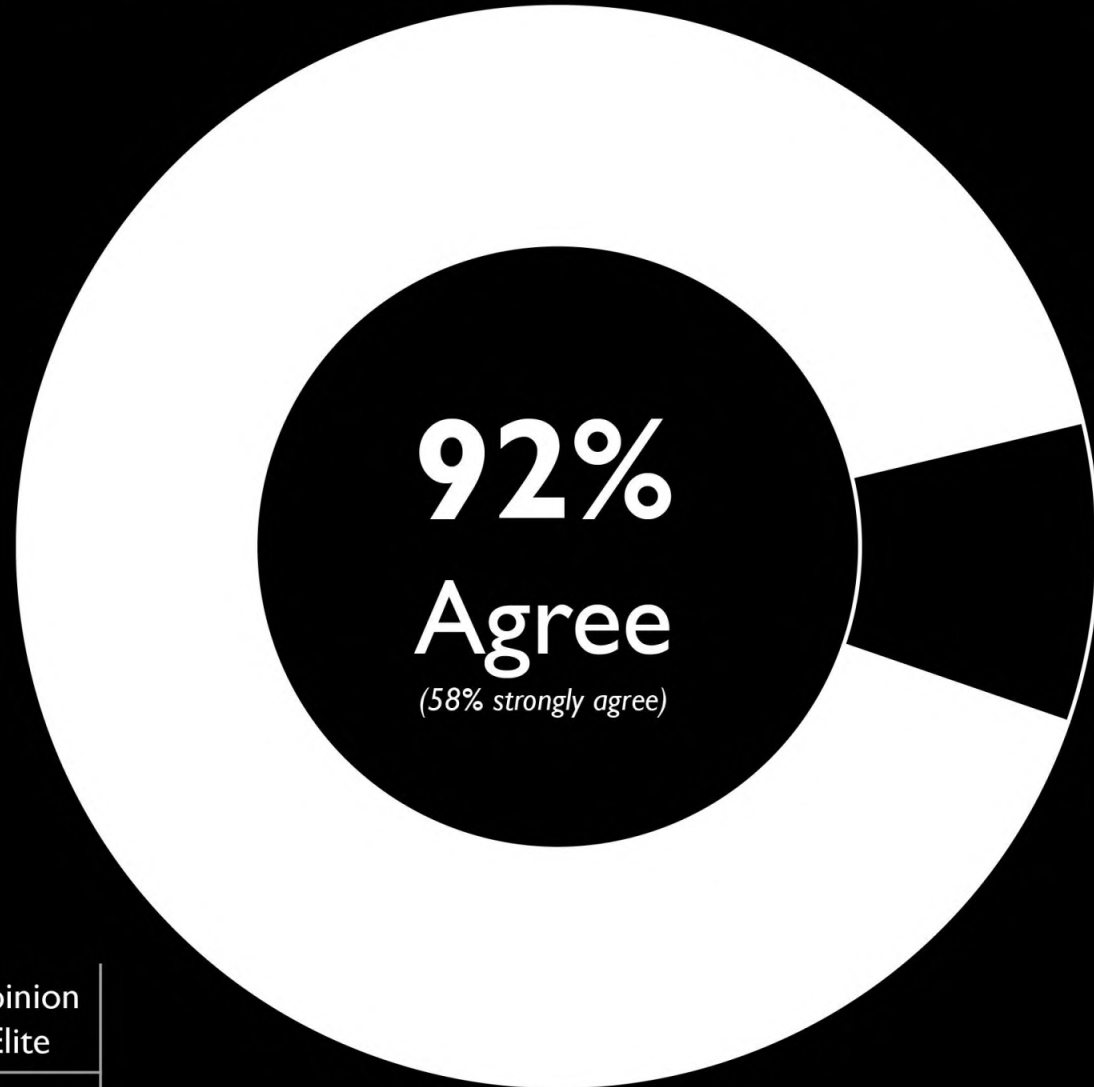
RESPONSIBLE ENERGY IMPORTS



THE SOURCE OF ENERGY MATTERS.

Strong majorities across all partisanships – and nearly ALL Democrats – are concerned. This is up 4 points from 2022.

“It matters to me
which countries we
import oil and gas
from.”

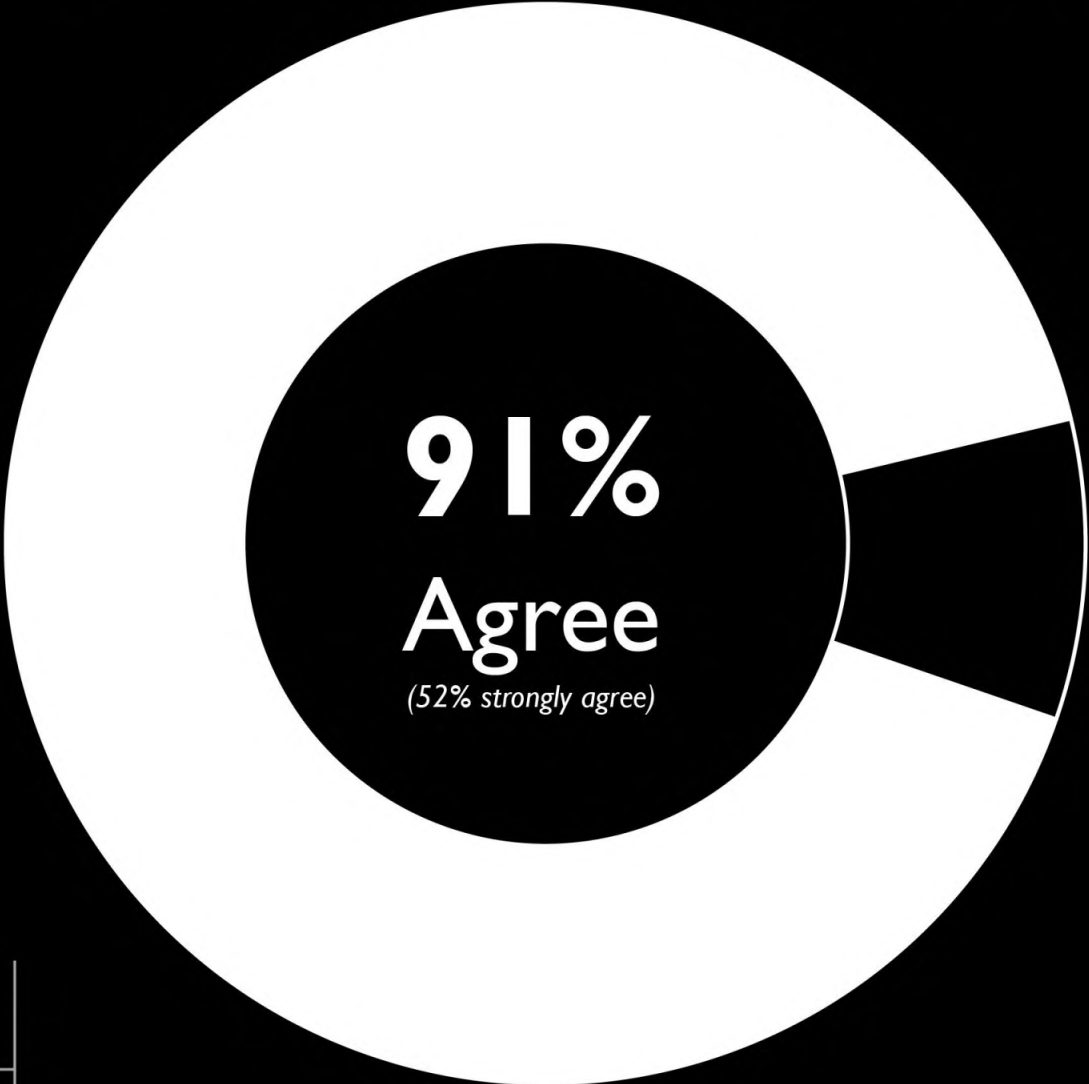


	Total 2022	GOP	IND	DEM	Opinion Elite
Agree (net)	88%	92%	82%	97%	91%

THE SOURCE OF CRITICAL MINERALS MATTERS.

Strong majorities across all partisanships -- and nearly ALL opinion elites -- are concerned with the source of critical minerals.

“It matters to me which countries we import critical minerals from for batteries.”

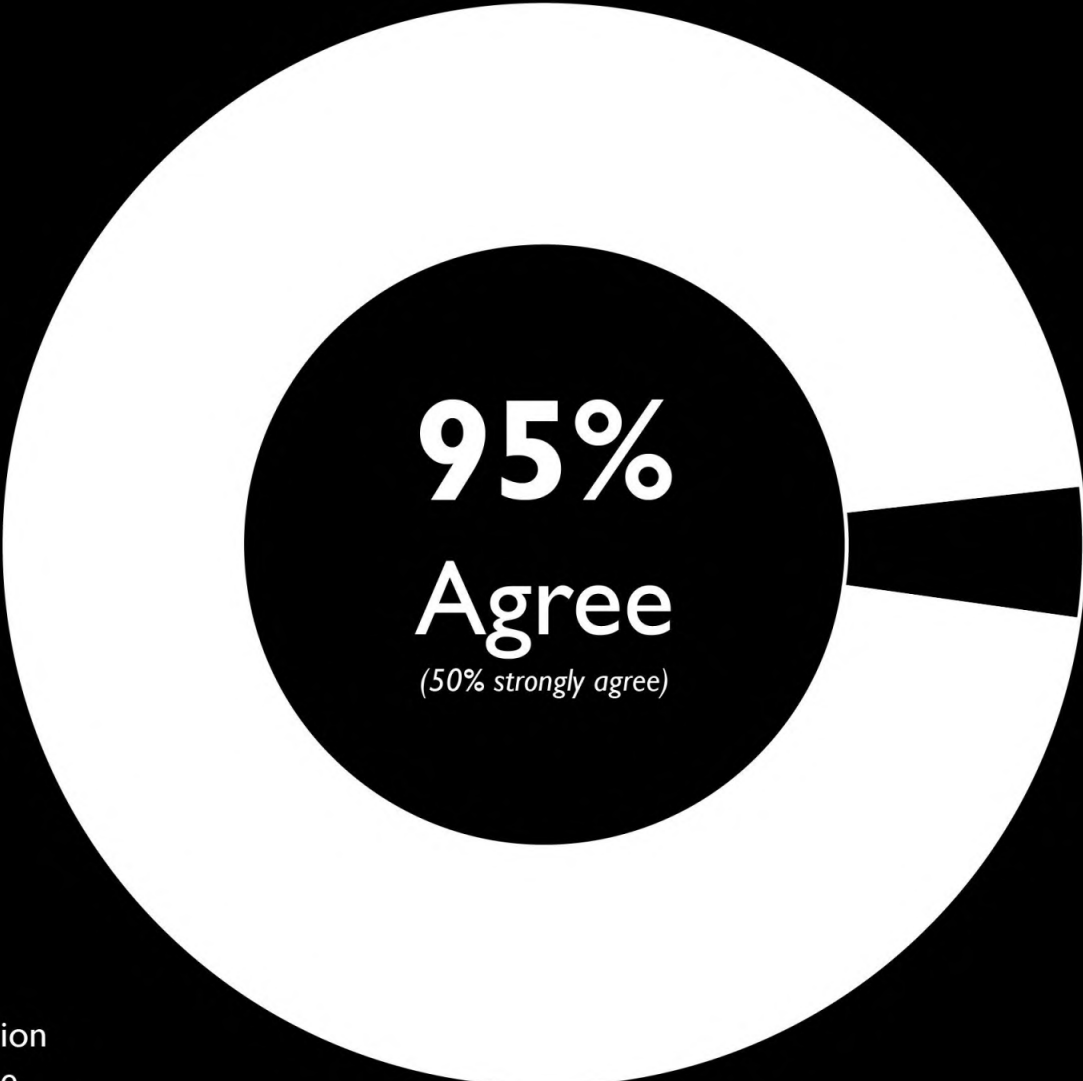


	GOP	IND	DEM	Opinion Elite
Agree (net)	91%	90%	93%	99%

CANADA IS STILL PREFERRED SOURCE FOR ENERGY IMPORTS.

Nearly ALL opinion elites prefer importing energy from Canada.

“I would prefer America to import energy from Canada rather than from other countries.”

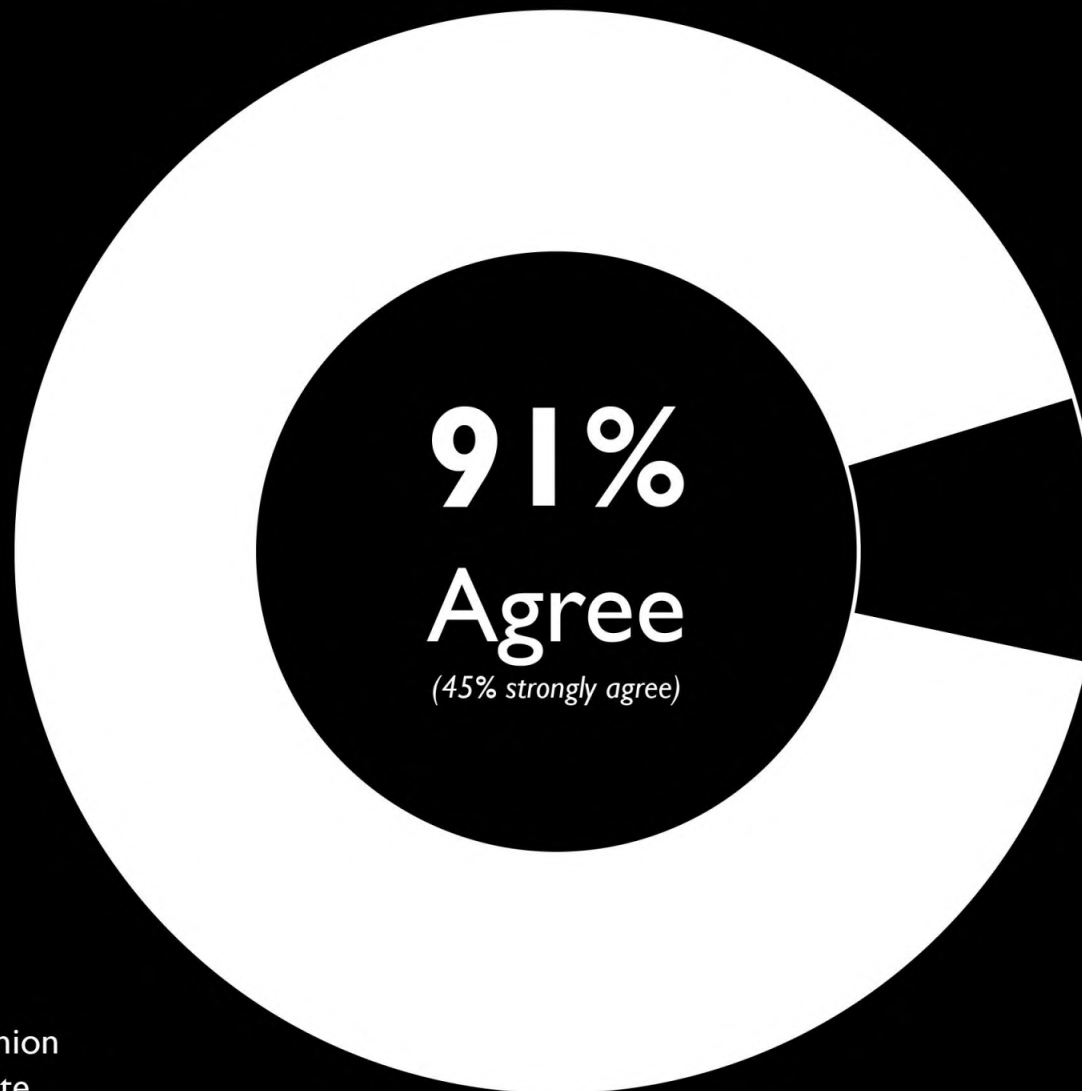


	Total 2022	GOP	IND	DEM	Opinion Elite
Agree (net)	96%	98%	91%	95%	99%

THE WINDOW OF OPPORTUNITY IS STILL OPEN.

Strong majorities are more open than normal to importing oil from Canada, especially among opinion elites.

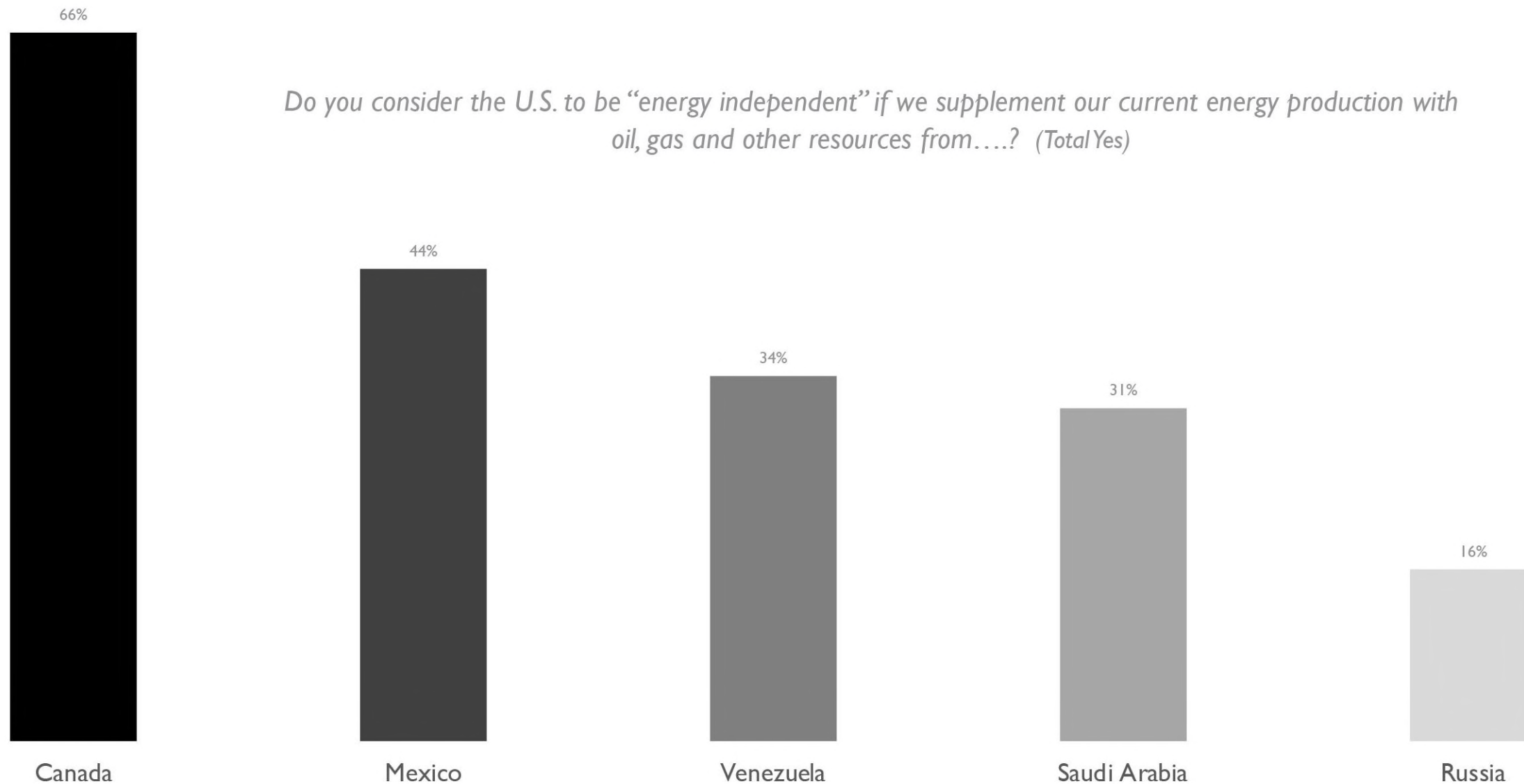
“Because of the scarcity of supply resulting from Russia’s war in Ukraine, I am more open than normal to the idea of importing oil from a country like Canada.”



	Total 2022	GOP	IND	DEM	Opinion Elite
Agree (net)	92%	89%	89%	95%	97%

CANADA IS ONLY OPTION FOR 'ENERGY INDEPENDENT' IMPORTS.

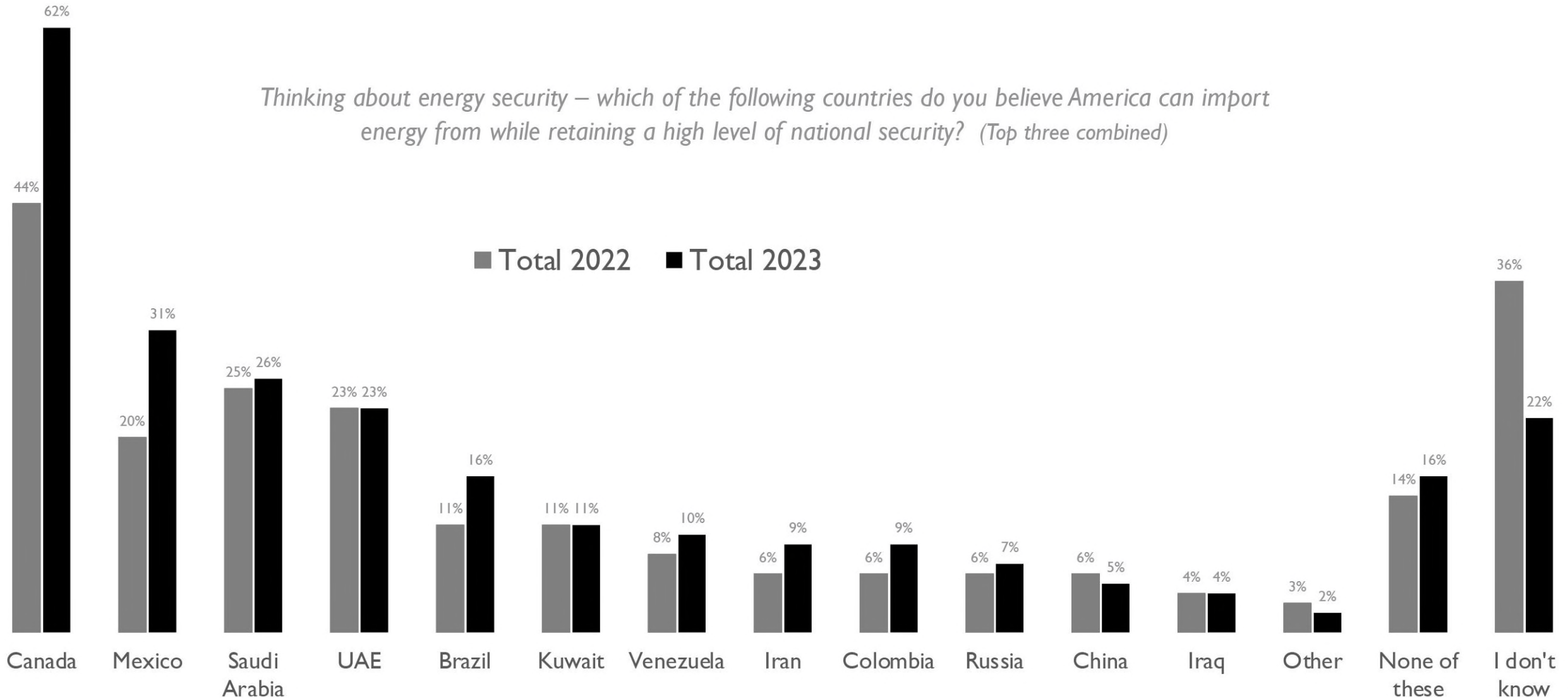
No other country tested gets a majority believing that the U.S. can still be 'energy independent' if we import resources from them.



CANADIAN IMPORTS KEEP AMERICA SECURE.

Canada has risen in preference on energy imports that allow the U.S. to maintain a high level of national security by 18 points since 2022.

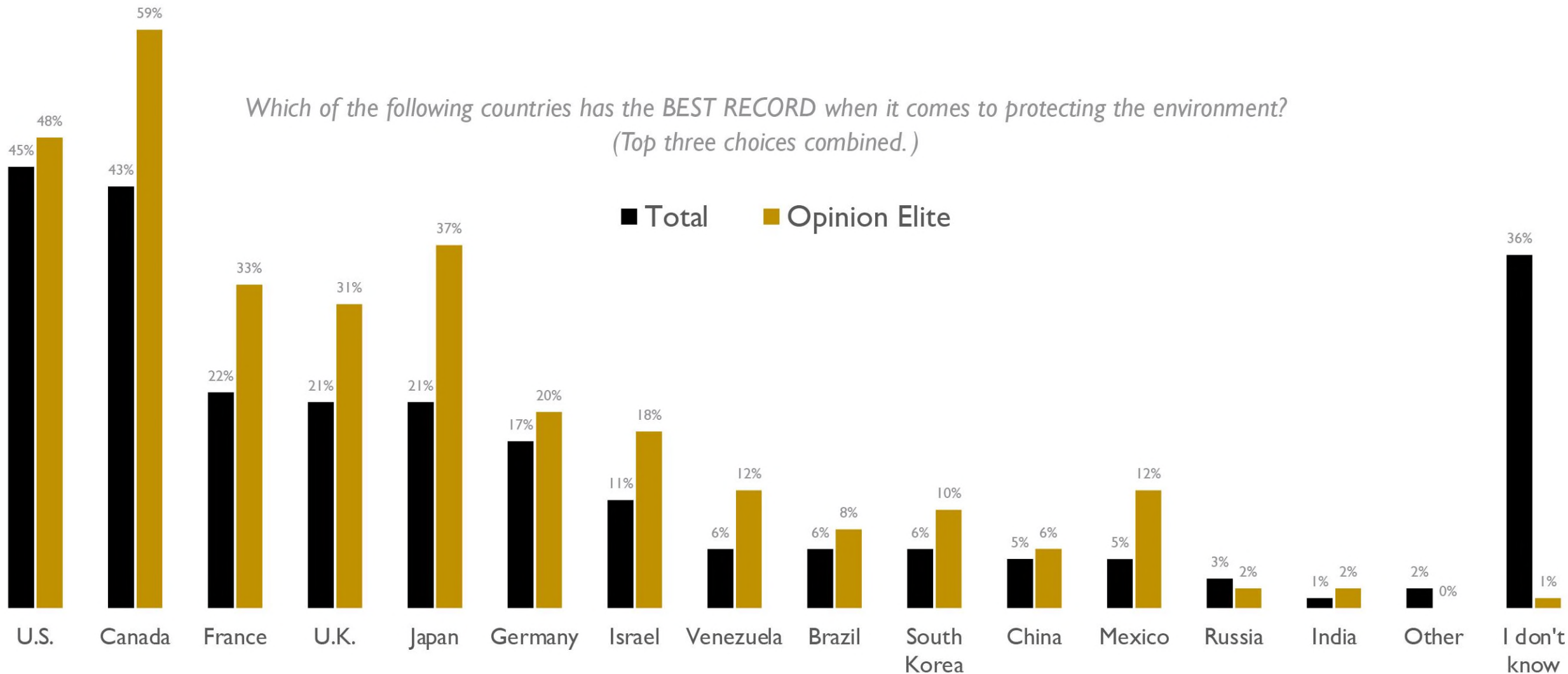
Thinking about energy security – which of the following countries do you believe America can import energy from while retaining a high level of national security? (Top three combined)



U.S. AND CANADA GET TOP MARKS ON THE ENVIRONMENT.

Opinion elites are more informed than voters overall and more likely to select Canada as having the best environmental record.

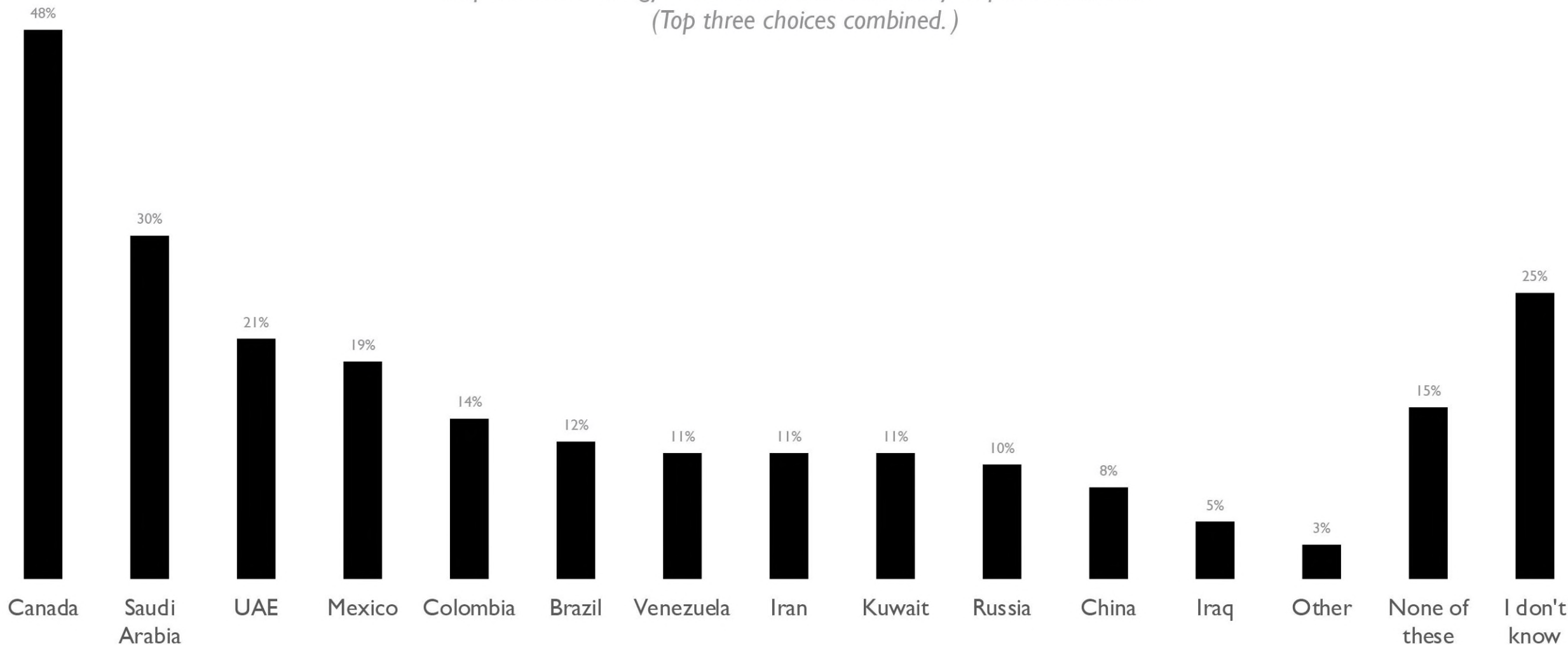
*Which of the following countries has the BEST RECORD when it comes to protecting the environment?
(Top three choices combined.)*



CANADA IS TOP FOR ENVIRONMENTALLY RESPONSIBLE ENERGY.

This is true among voters overall, opinion elites and across the political spectrum.

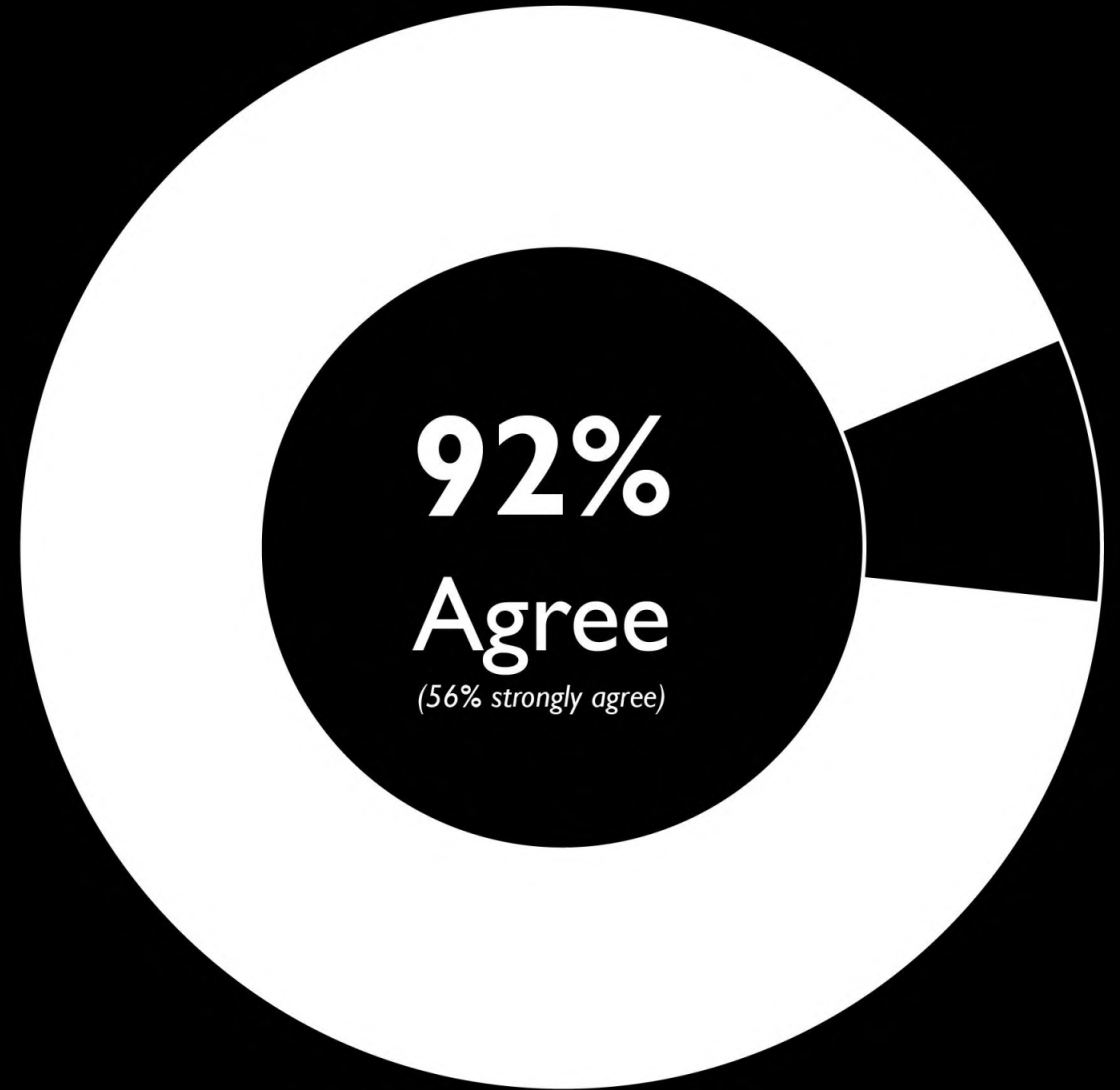
*If America has to import energy to meet demand, which of the following countries do you think can best help meet our energy needs in an environmentally responsible manner?
(Top three choices combined.)*



RELIABLE TRADING PARTNERS ARE STILL IMPORTANT.

However, this sentiment has softened since 2022.

“With Russia’s war in Ukraine raising energy costs and threatening the global energy supply, it’s more important than ever to have safe, stable, secure and reliable energy trading partners like Canada.”

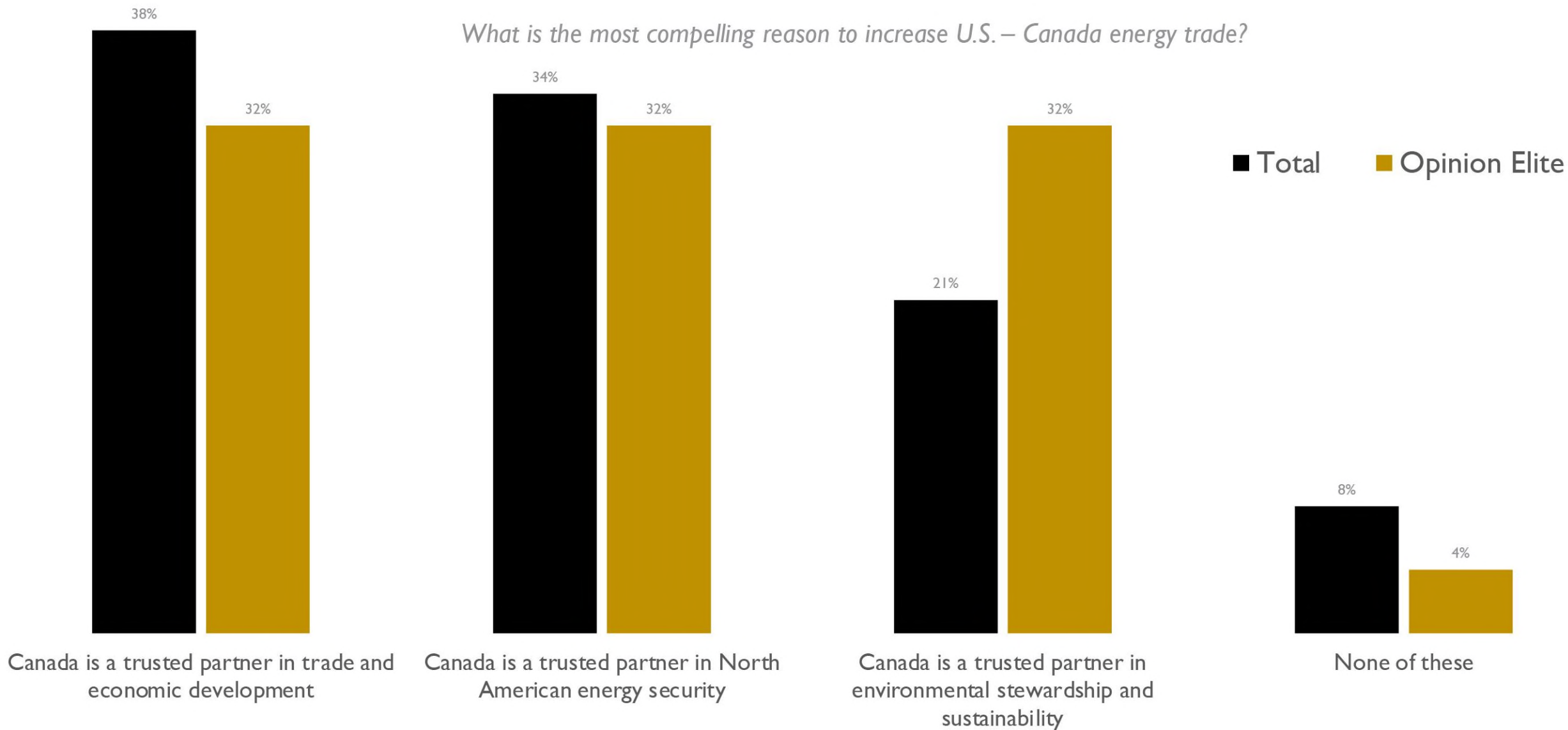


	Total 2022	GOP	IND	DEM	Opinion Elite
Agree (net)	96%	95%	83%	94%	90%

FOR VOTERS TRADE AND ECONOMIC DEVELOPMENT ARE BENEFITS.

Opinion elites are split.

What is the most compelling reason to increase U.S. – Canada energy trade?



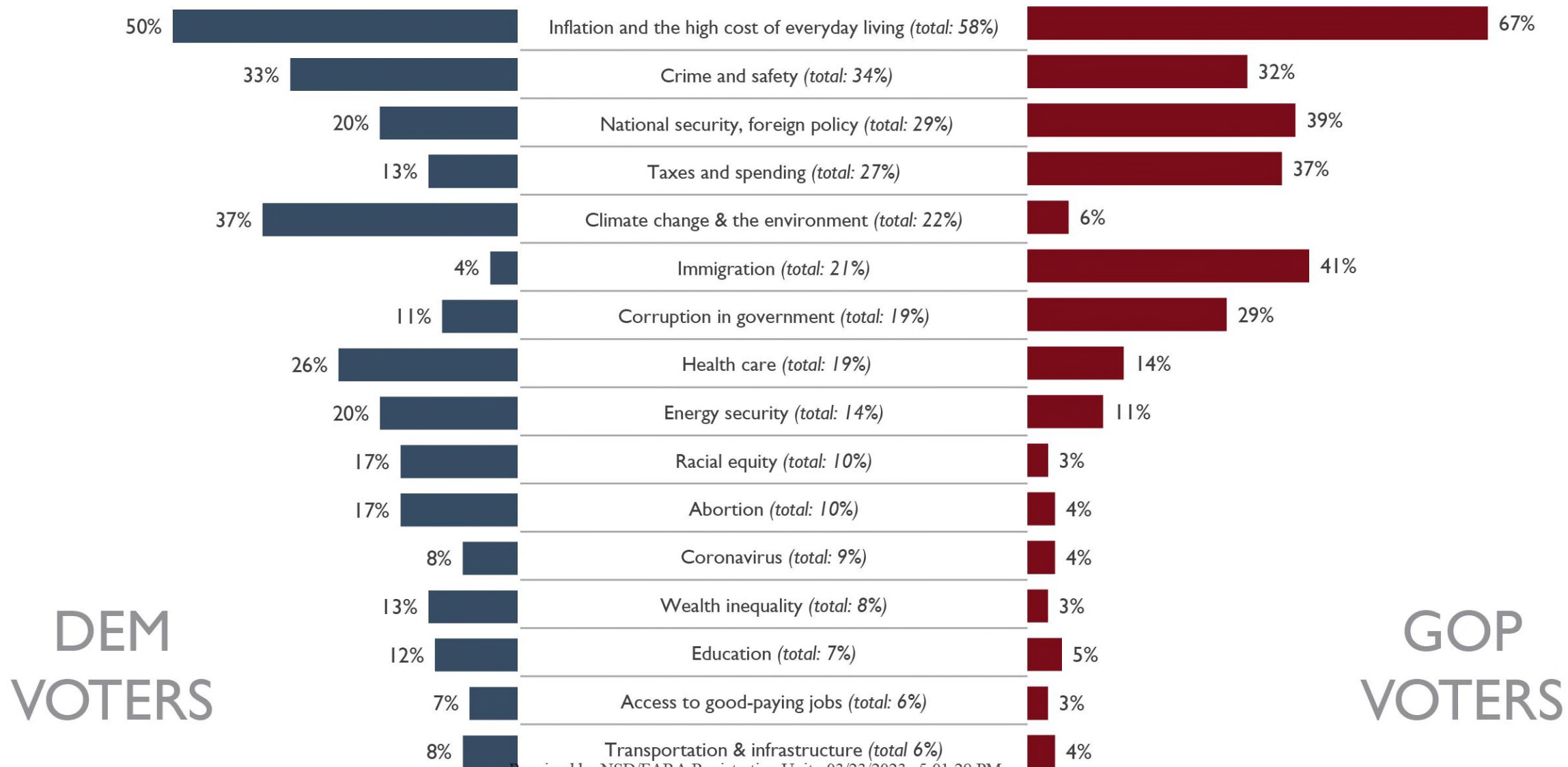
VOTER PERCEPTIONS & PRIORITIES

Alberta 

VOTER PRIORITIES:

Inflation remains the most pressing issue – however, concerns about national security and energy security have risen since 2022.

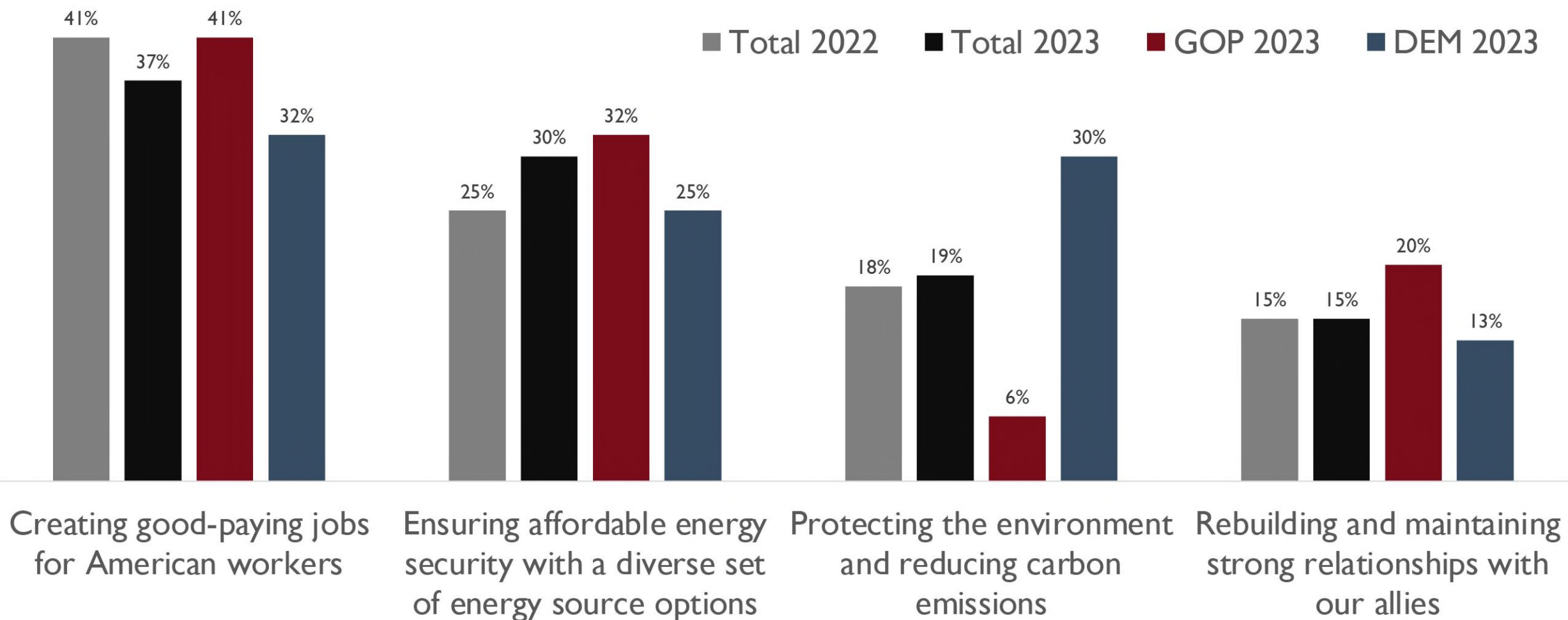
Over the next two years, which of the following issues do you think is most important for the President & Congress to address? (Top 3 choices combined)



CREATING JOBS IS STILL THE BIGGEST PRIORITY FOR VOTERS.

Though energy security has risen in importance.

When it comes to our priorities as a country, which of the following is most important to you?



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THANK YOU!

Alberta 