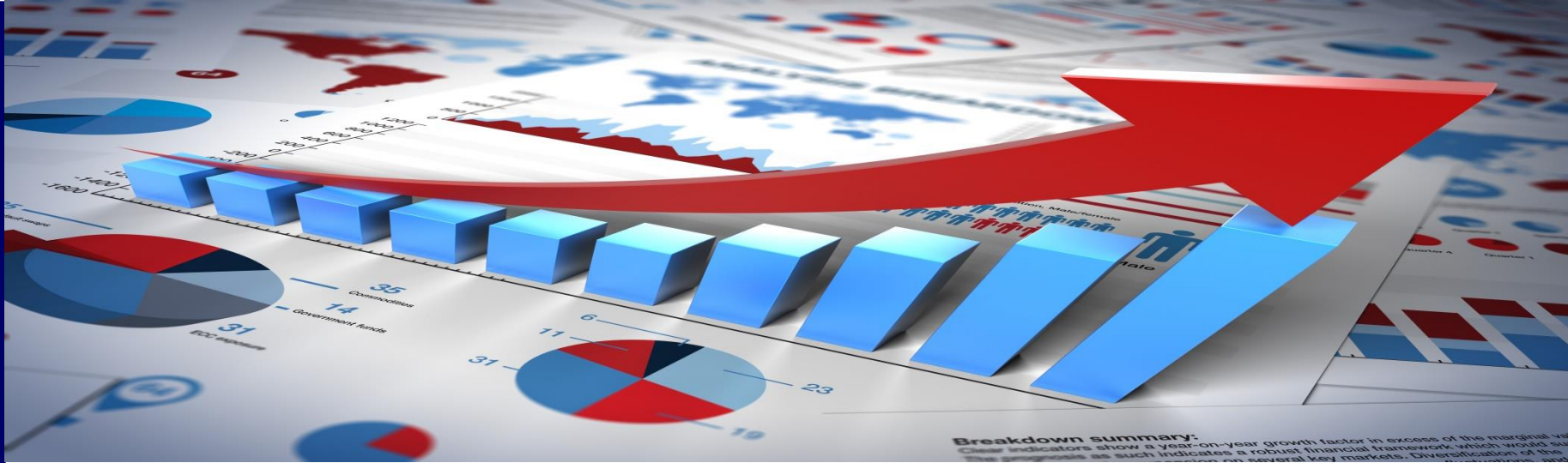




Keystone Pipeline – Canada
Released January 15, 2014



Executive Summary

The latest Nanos survey on the Keystone Pipeline suggests both the impressions of the project and the support are noticeably declining compared to April 2013. Key highlights of the research completed in December include:

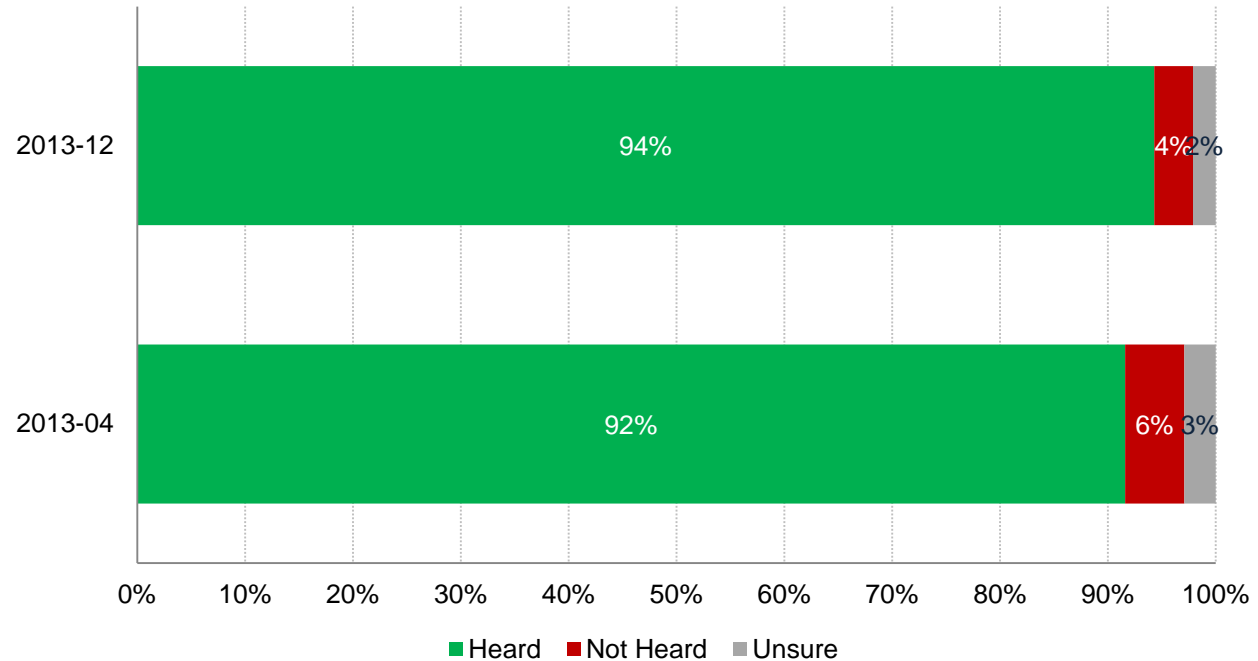
- 94.3 percent of Canadians have heard of the project (compared to 91.6 percent in April 2013);
- 47.5 percent of Canadians had a positive or somewhat positive impression of the project (compared to 60.1 percent that had a positive or somewhat positive impression in April 2013); and,
- 51.6 percent supported or somewhat supported approval of the project (compared to 67.5 percent who supported or somewhat supported approval in April 2013).

The research was commissioned independently by Nanos Research and led by Nik Nanos, a Global Fellow on Energy Policy at the Woodrow Wilson International Center for Scholars in Washington DC, and President of Nanos Research.

Project Awareness – Canada

Source: Nanos Research, RDD Dual Frame Hybrid Telephone and Online Survey, December 14 to 16, 2013, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, National Telephone Random Survey, April 6 to 9, 2013, n=1,013, accurate 3.1 percentage points plus or minus, 19 times out of 20.

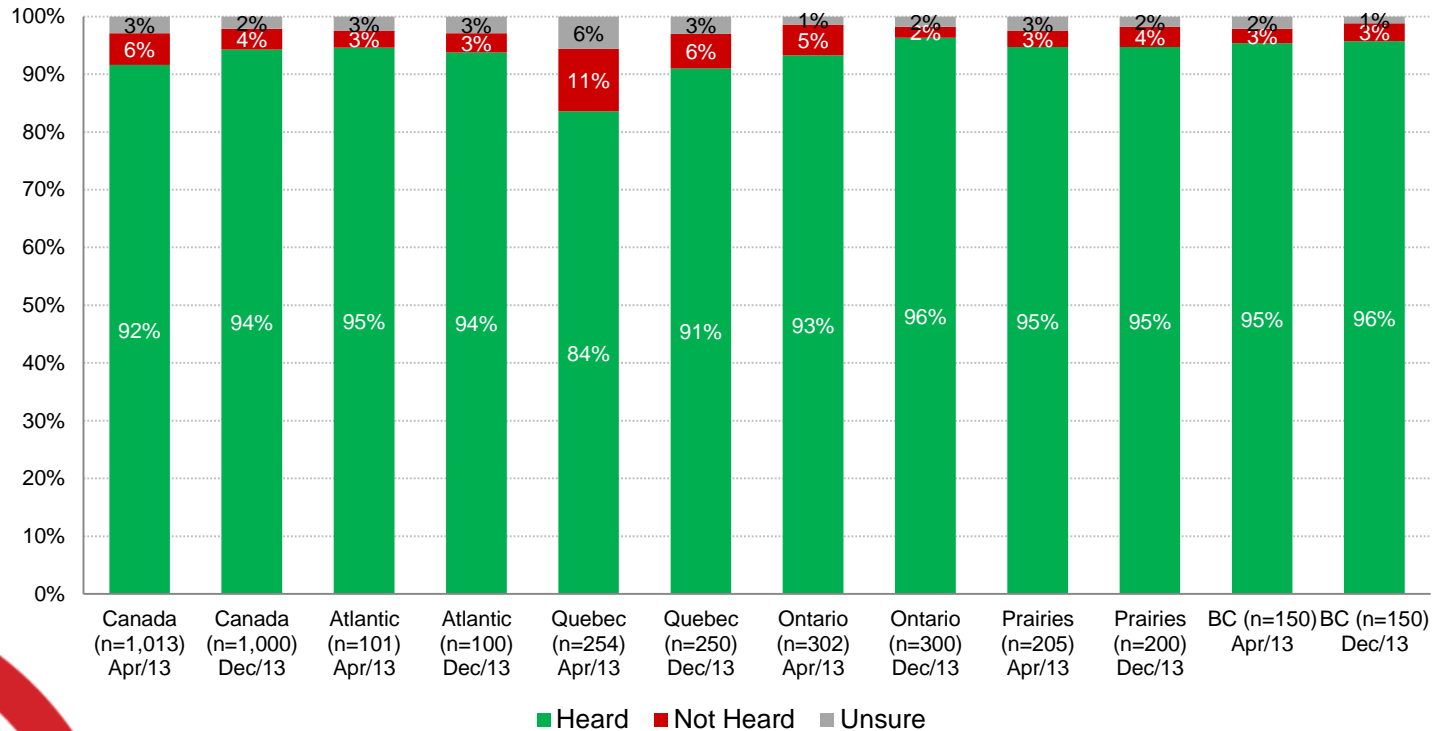


QUESTION – Have you heard or not heard of the Keystone Pipeline project which is a pipeline system to transport synthetic crude oil and diluted bitumen from the Alberta oil sands in Canada to the United States?

Project Awareness – Regional

Source: Nanos Research, RDD Dual Frame Hybrid Telephone and Online Survey, December 14 to 16, 2013, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, National Telephone Random Survey, April 6 to 9, 2013, n=1,013, accurate 3.1 percentage points plus or minus, 19 times out of 20.

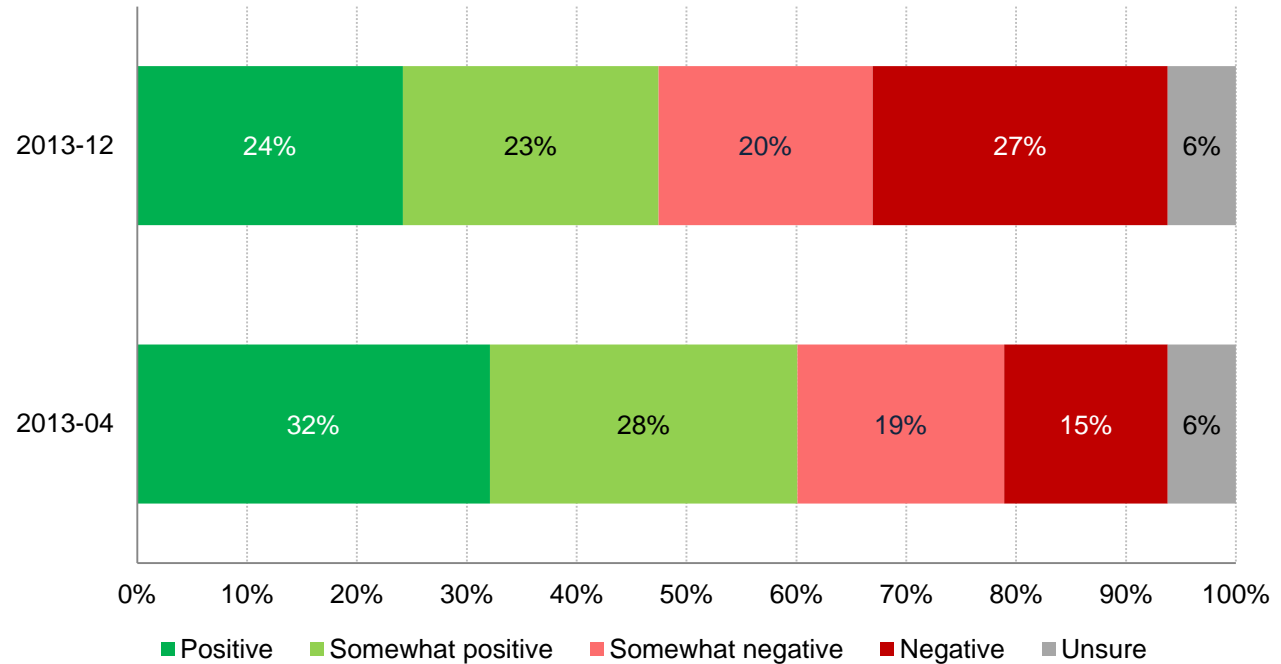


QUESTION – Have you heard or not heard of the Keystone Pipeline project which is a pipeline system to transport synthetic crude oil and diluted bitumen from the Alberta oil sands in Canada to the United States?

Impressions – Canada

Source: Nanos Research, RDD Dual Frame Hybrid Telephone and Online Survey, December 14 to 16, 2013, n=964, accurate 3.2 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, National Telephone Random Survey, April 6 to 9, 2013, n=928, accurate 3.2 percentage points plus or minus, 19 times out of 20.

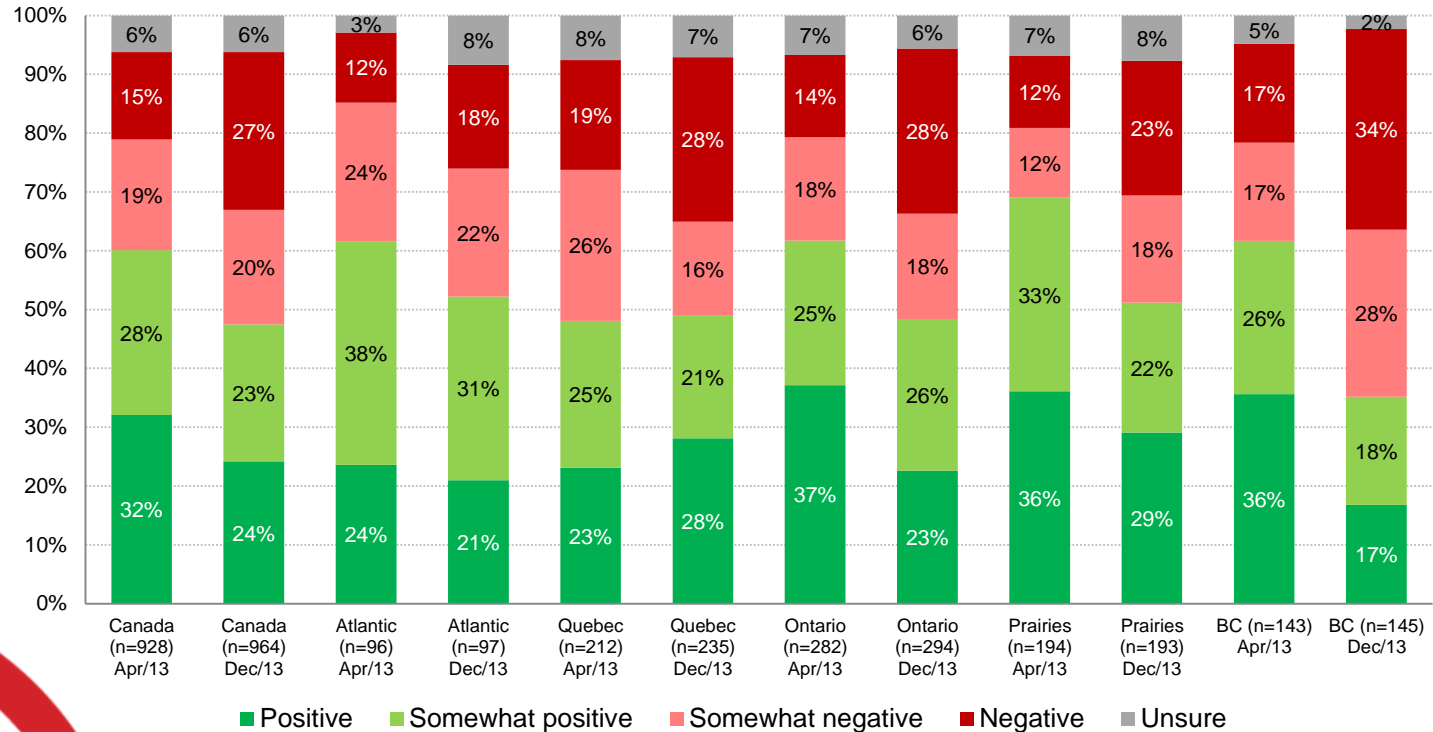


QUESTION – Do you have a positive, somewhat positive, somewhat negative or negative view of the Keystone Pipeline project?

Impressions – Regional

Source: Nanos Research, RDD Dual Frame Hybrid Telephone and Online Survey, December 14 to 16, 2013, n=964, accurate 3.2 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, National Telephone Random Survey, April 6 to 9, 2013, n=928, accurate 3.2 percentage points plus or minus, 19 times out of 20.

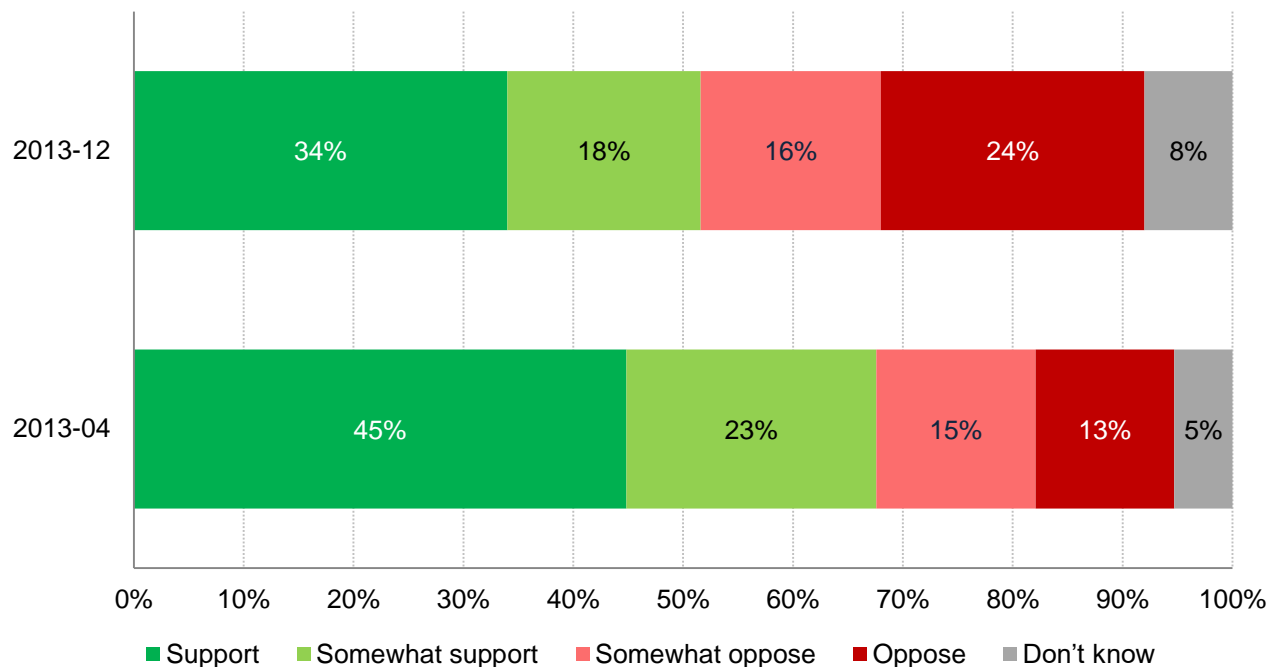


QUESTION – Do you have a positive, somewhat positive, somewhat negative or negative view of the Keystone Pipeline project?

Supporting the Project – Canada

Source: Nanos Research, RDD Dual Frame Hybrid Telephone and Online Survey, December 14 to 16, 2013, n=964, accurate 3.2 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, National Telephone Random Survey, April 6 to 9, 2013, n=928, accurate 3.2 percentage points plus or minus, 19 times out of 20.

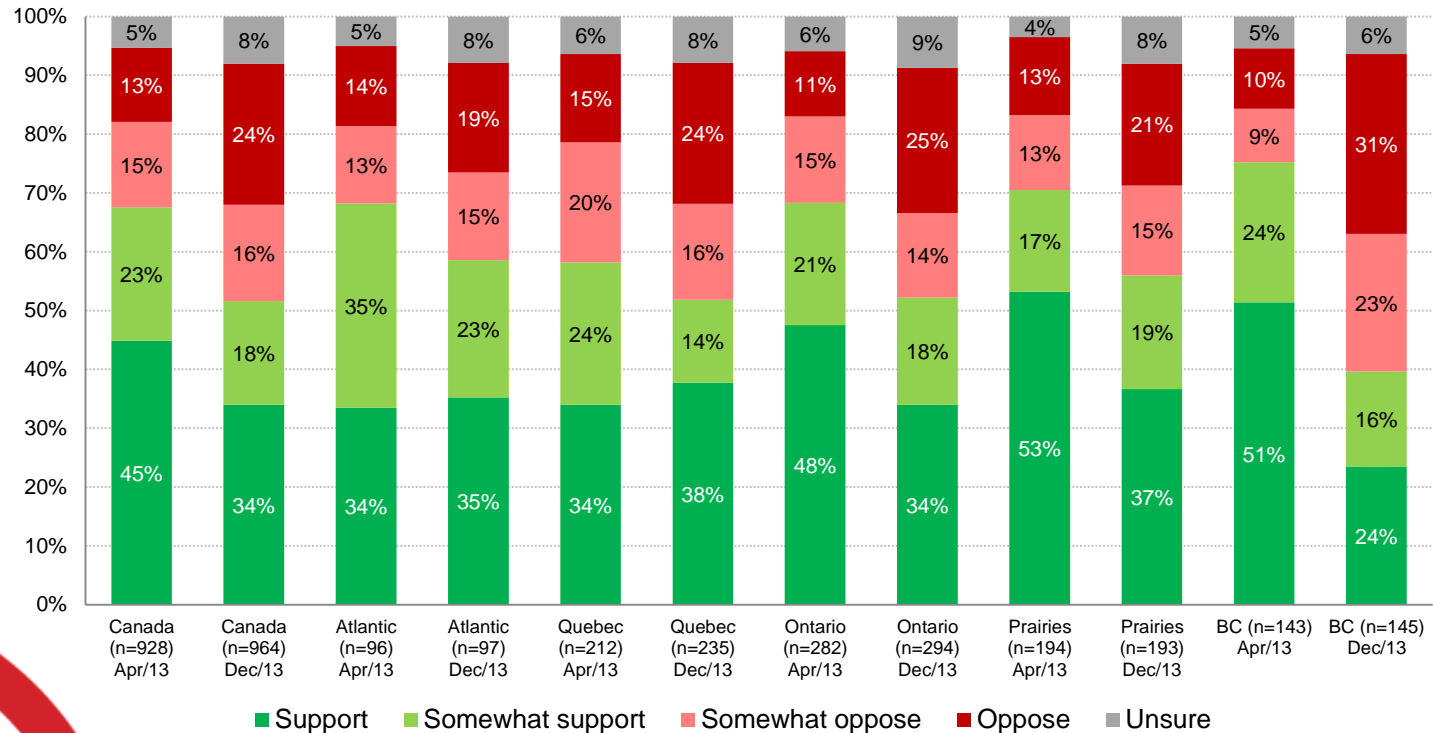


QUESTION – Based on what you have heard about the proposed Keystone XL pipeline between Canada and the US, do you support, somewhat support, somewhat oppose or oppose the Canadian government approving the project?

Supporting the Project – Regional

Source: Nanos Research, RDD Dual Frame Hybrid Telephone and Online Survey, December 14 to 16, 2013, n=964, accurate 3.2 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, National Telephone Random Survey, April 6 to 9, 2013, n=928, accurate 3.2 percentage points plus or minus, 19 times out of 20.



QUESTION – Based on what you have heard about the proposed Keystone XL pipeline between Canada and the US, do you support, somewhat support, somewhat oppose or oppose the Canadian government approving the project?



Methodology

Methodology

National Nanos RDD dual frame hybrid telephone and online random survey of 1,000 Canadians conducted between December 14th and 16th, 2013 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted using the latest Census data. A random survey of 1,000 Canadians is accurate ± 3.1 percentage points 19 times out of 20

The results from the previous wave are from a national dual frame (land- and cell-line sample) random telephone survey of 1,013 Canadians conducted between April 6th and 9th, 2013. The results were statistically checked and weighted using the latest Census data. A random survey of 1,013 Canadians is accurate ± 3.1 percentage points 19 times out of 20.

Factoring the random selection process and comparable dual-frame base samples, which used live agents calling RDD land- and cell-line numbers, the research between waves is a reliable estimate of public opinion for the Canadian population.

Both waves of research were conducted and commissioned independently by Nanos Research a part of a Global Fellow program with the Woodrow Wilson International Center for Scholars in Washington DC.

About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



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Tabulations

Confidential



2014-03 – KEYSTONE PIPELINE – STAT SHEET – DRAFT

Question 1 – Have you heard or not heard of the Keystone Pipeline project which is a pipeline system to transport synthetic crude oil and diluted bitumen from the Alberta oil sands in Canada to the United States?					
		Total	Heard	Not heard	Unsure
		Responses	Percentage	Percentage	Percentage
Region	USA 2014-03	1000	78.9	19.7	1.4
	Northeast	176	76.0	23.4	.6
	Midwest	223	84.8	13.3	1.8
	South	364	78.0	20.9	1.1
	West	236	76.8	21.1	2.2
Gender	Male	443	87.8	12.0	.2
	Female	557	71.8	25.8	2.4
	18 to 29	223	80.3	18.8	1.0
Age	30 to 39	177	77.4	21.0	1.6
	40 to 49	196	66.8	31.2	2.0
	50 to 59	175	81.1	16.6	2.3
	60 plus	229	87.5	12.1	.4

Question 2 – Do you have a positive, somewhat positive, somewhat negative or negative view of the Keystone Pipeline project?							
		Total	Positive	Somewhat positive	Somewhat negative	Negative	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	USA 2014-03	789	39.1	18.1	12.0	17.5	13.3
	Northeast	134	36.2	15.2	16.0	13.7	18.8
	Midwest	189	27.3	22.2	13.3	18.8	18.4
	South	284	44.1	21.7	8.7	13.8	11.8
	West	181	45.7	10.5	12.9	24.8	6.2
Gender	Male	389	50.3	15.2	11.9	10.6	12.1
	Female	400	28.2	21.0	12.1	24.3	14.4
	18 to 29	179	33.7	18.9	14.2	16.4	16.8
Age	30 to 39	137	34.9	28.3	17.5	11.5	7.8
	40 to 49	131	38.1	11.5	13.4	25.5	11.5
	50 to 59	142	41.7	18.1	8.6	20.8	10.8
	60 plus	200	45.6	14.8	7.7	15.1	16.8



2014-03 – KEYSTONE PIPELINE – STAT SHEET – DRAFT

		Question 3 – Based on what you have heard about the proposed Keystone XL pipeline between Canada and the US, do you support, somewhat support, somewhat oppose or oppose the US government approving the project?					
		Total	Support	Somewhat support	Somewhat oppose	Oppose	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	USA 2014-03	789	42.6	19.7	9.4	18.4	9.9
	Northeast	134	34.0	26.0	11.8	18.1	10.1
	Midwest	189	34.5	21.0	16.9	14.1	13.6
	South	284	51.0	18.7	3.6	15.6	11.1
	West	181	44.4	15.1	8.8	27.6	4.1
Gender	Male	389	52.3	17.7	10.6	14.3	5.1
	Female	400	33.2	21.6	8.2	22.5	14.6
Age	18 to 29	179	31.4	16.5	13.4	18.4	20.3
	30 to 39	137	36.2	31.8	7.8	18.8	5.4
	40 to 49	131	41.7	19.0	13.2	19.7	6.4
	50 to 59	142	51.9	14.8	7.8	20.5	5.0
	60 plus	200	51.1	18.1	5.4	15.9	9.4



2014-469 KEYSTONE PIPELINE QUESTIONS – STAT SHEET

		Question 1 – Have you heard or not heard of the Keystone Pipeline project which is a pipeline system to transport synthetic crude oil and diluted bitumen from the Alberta oil sands in Canada to the United States?			
		Total	Heard	Not heard	Unsure
		Responses	Percentage	Percentage	Percentage
Region	Canada 2013-12	1000	94.3	3.6	2.1
	Atlantic Canada	100	93.8	3.3	2.9
	Quebec	250	91.1	6.0	3.0
	Ontario	300	96.3	1.9	1.8
	Prairies	200	94.8	3.5	1.8
	British Columbia	150	95.7	3.1	1.2
Gender	Male	508	98.1	.7	1.2
	Female	492	90.4	6.5	3.1
Age	18 to 29	205	94.8	3.8	1.4
	30 to 39	169	89.0	7.0	4.0
	40 to 49	208	93.4	4.1	2.4
	50 to 59	178	95.0	2.9	2.1
	60 plus	239	98.0	.9	1.1

National Nanos RDD dual frame hybrid telephone and online random survey of 1,000 Canadians conducted between December 14th and 16th, 2013. Participants were randomly recruited by telephone and administered a survey online. The sample included both land- and cell-lines across Canada. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.



2014-469 KEYSTONE PIPELINE QUESTIONS – STAT SHEET

		Question 2 – Do you have a positive, somewhat positive, somewhat negative or negative view of the Keystone Pipeline project?					
		Total	Positive	Somewhat positive	Somewhat negative	Negative	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada	964	24.2	23.3	19.5	26.9	6.2
	2013-12						
	Atlantic Canada	97	21.0	31.2	21.8	17.6	8.4
	Quebec	235	28.1	20.8	16.0	27.9	7.1
	Ontario	294	22.6	25.8	17.9	28.1	5.6
	Prairies	193	29.1	22.1	18.2	22.9	7.7
Gender	British Columbia	145	16.8	18.4	28.4	34.1	2.3
	Male	505	31.7	24.3	16.2	24.6	3.2
Age	Female	460	15.9	22.1	23.1	29.4	9.5
	18 to 29	198	20.8	19.1	22.9	34.4	2.9
	30 to 39	157	17.6	18.6	23.9	29.1	10.8
	40 to 49	200	26.7	21.1	19.3	26.5	6.5
	50 to 59	173	23.7	27.4	20.6	20.7	7.6
	60 plus	237	29.7	28.8	13.1	23.9	4.5

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2014-469 KEYSTONE PIPELINE QUESTIONS – STAT SHEET

		Question 3 – Based on what you have heard about the proposed Keystone XL pipeline between Canada and the US, do you support, somewhat support, somewhat oppose or oppose the Canadian government approving the project?					
		Total	Support	Somewhat support	Somewhat oppose	Oppose	Don't know
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2013-12	964	34.0	17.6	16.4	24.0	8.0
	Atlantic Canada	97	35.2	23.3	14.9	18.6	7.9
	Quebec	235	37.7	14.1	16.3	23.9	7.9
	Ontario	294	34.0	18.2	14.4	24.7	8.7
	Prairies	193	36.6	19.3	15.3	20.7	8.0
	British Columbia	145	23.5	16.2	23.4	30.6	6.4
Gender	Male	505	43.8	16.0	14.0	21.4	4.8
	Female	460	23.2	19.4	19.1	26.9	11.5
Age	18 to 29	198	34.6	10.2	19.5	31.5	4.2
	30 to 39	157	24.7	14.1	20.2	24.9	16.0
	40 to 49	200	33.1	19.3	17.9	23.1	6.6
	50 to 59	173	30.4	25.4	15.8	18.4	10.0
	60 plus	237	42.9	19.1	10.6	21.9	5.4

National Nanos RDD dual frame hybrid telephone and online random survey of 1,000 Canadians conducted between December 14th and 16th, 2013. Participants were randomly recruited by telephone and administered a survey online. The sample included both land- and cell-lines across Canada. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.