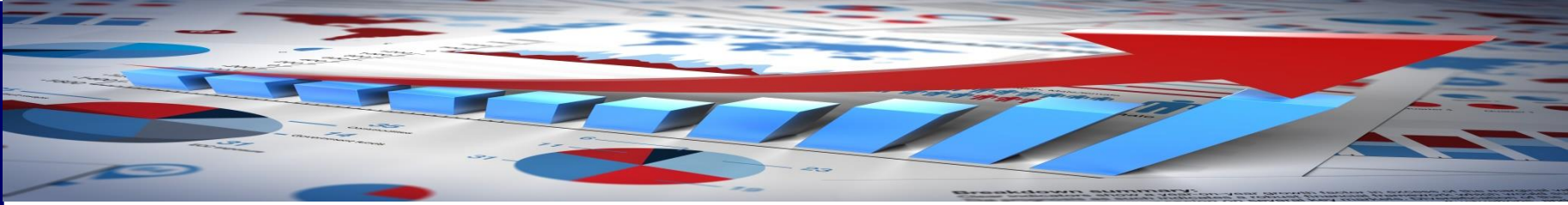




***Bloomberg-Nanos BC Northern Gateway Pipeline Survey  
Part 1 of 2, June 2014 (Submission 2014-525)***



## *At a glance*

To follow are the key highlights of Bloomberg-Nanos a random telephone survey conducted in British Columbia on the Northern Gateway Pipeline.

1. Only a minority want approval of the proposed project at this time (29 percent) while 34 percent prefer the project not be approved and another 33 percent want the project delayed for further review.
2. The Harper government has a lower comparative credibility on this issue compared to other stakeholders. It should, therefore, be considered comparatively weaker in terms of engaging the public on this project in BC. Environmental groups and Aboriginal leaders have the highest comparable credibility, followed by the Clark provincial government, Enbridge and the Harper federal government.
3. The most frequent association with the project was the belief that someday the pipeline might lead to an oil spill followed by the job creation aspect of the proposed pipeline.

This is one of a two part survey release by Bloomberg Nanos.


All references to the data should cite the source as a “Bloomberg-Nanos Survey”. Questions should be directed to:

Nik Nanos, Nanos Research

Global Fellow (Energy Policy), Woodrow Wilson International Center for Scholars in Washington DC

[nnanos@nanosresearch.com](mailto:nnanos@nanosresearch.com)



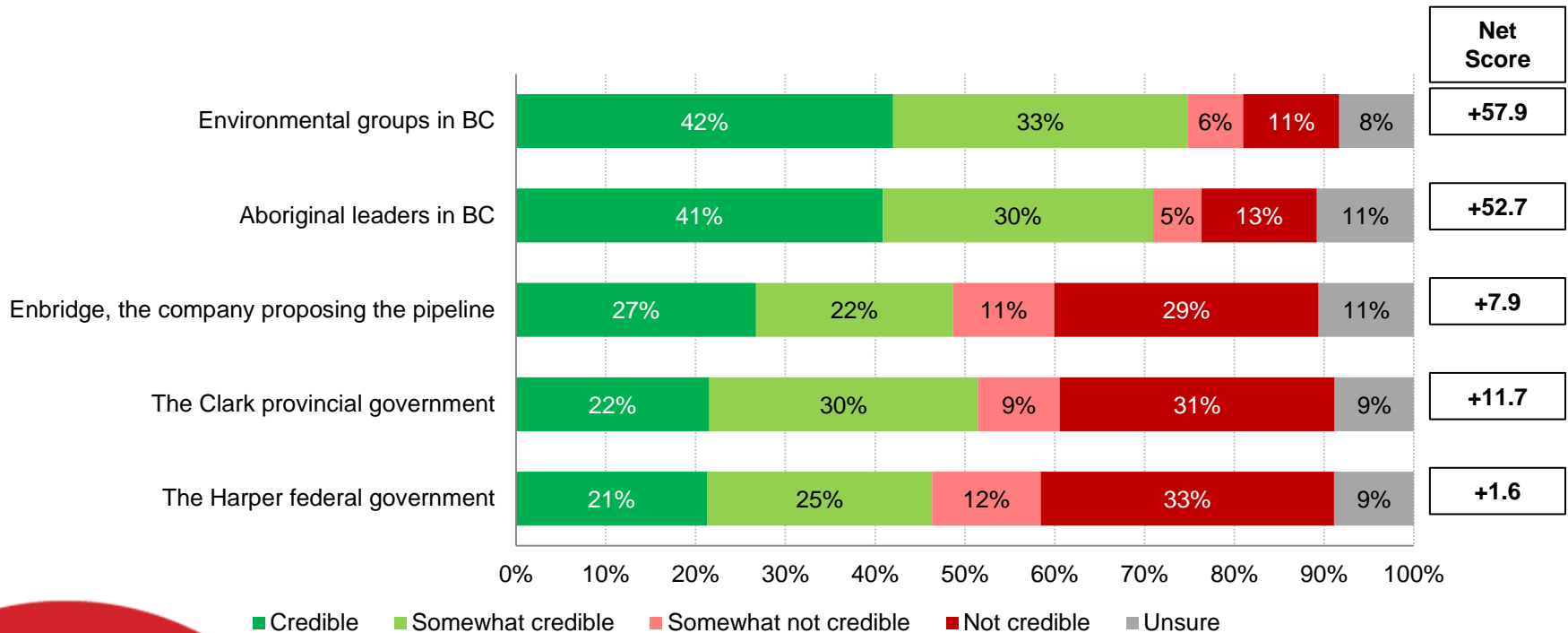


A new Bloomberg Nanos survey in British Columbia suggests that 29 percent of British Columbians believe that the proposed Northern Gateway pipeline should be approved at this time. Thirty four percent believe the proposed pipeline should not be approved, 33 percent believe it should be delayed for further review and the rest were unsure. Men are more likely than women to believe the project should be approved. However women are more likely than men to believe the project should be delayed for further review.

- ▶ The two most prominent associations British Columbians have of the pipeline is the view that the pipeline might lead to an oil spill someday (36 percent) and that the project will create jobs in BC (25 percent). Sixteen percent of BCers associated revenue for the provincial government and another 15 percent associated the pipeline with contributions to climate change.
- ▶ Environmental groups in BC and Aboriginal leaders in BC are more likely to be considered credible or somewhat credible on the issue of the pipeline (75 percent and 71 percent respectively). Almost one of two respondents (49 percent) thought that Enbridge, the company proposing the pipeline was credible or somewhat credible. One half of British Columbians (51 percent) thought the Clark provincial government was credible or somewhat credible on this issue while 46 percent of respondents believed the Harper federal government was credible or somewhat credible.
- ▶ Just as many British Columbians thought that Aboriginal groups have the right amount of influence (36 percent) as thought that they should have more influence (35 percent). Only 22 percent of respondents thought they should have less influence while eight percent were unsure.

# Credibility of Stakeholders

Source: Nanos Research, RDD dual frame random telephone survey, May 27-31, 2014, n=500 British Columbians, accurate 4.4 percentage points plus or minus, 19 times out of 20.

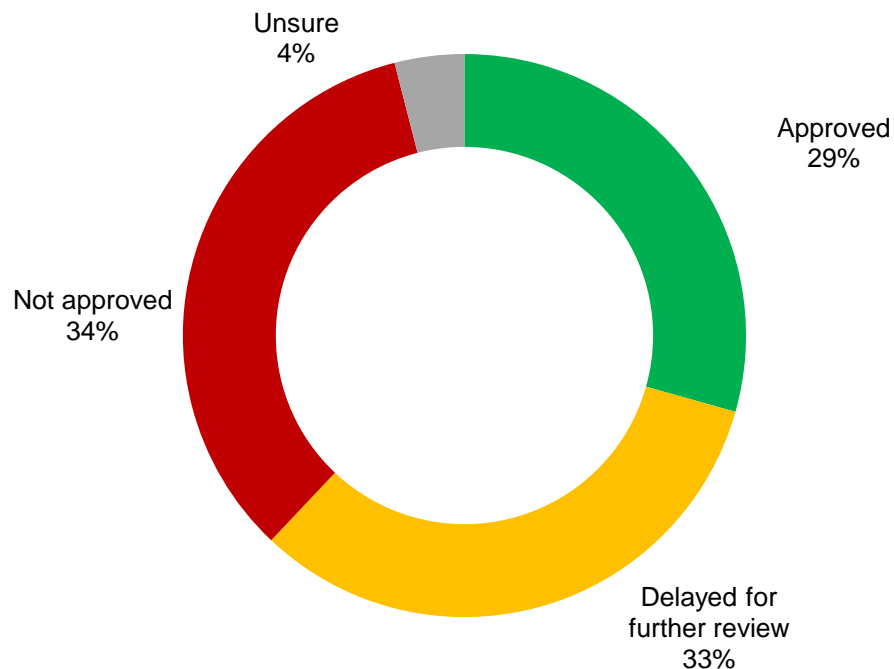


**\*Note: Charts may not add up to 100 due to rounding**

**QUESTION** – With regards to the Northern Gateway project, a proposed pipeline to bring oil to the Pacific Coast from Alberta’s oil sands, are the following stakeholders credible, somewhat credible, somewhat not credible or not credible on the issue?

# Paths Forward

Source: Nanos Research, RDD dual frame random telephone survey, May 27-31, 2014, n=500 British Columbians, accurate 4.4 percentage points plus or minus, 19 times out of 20.

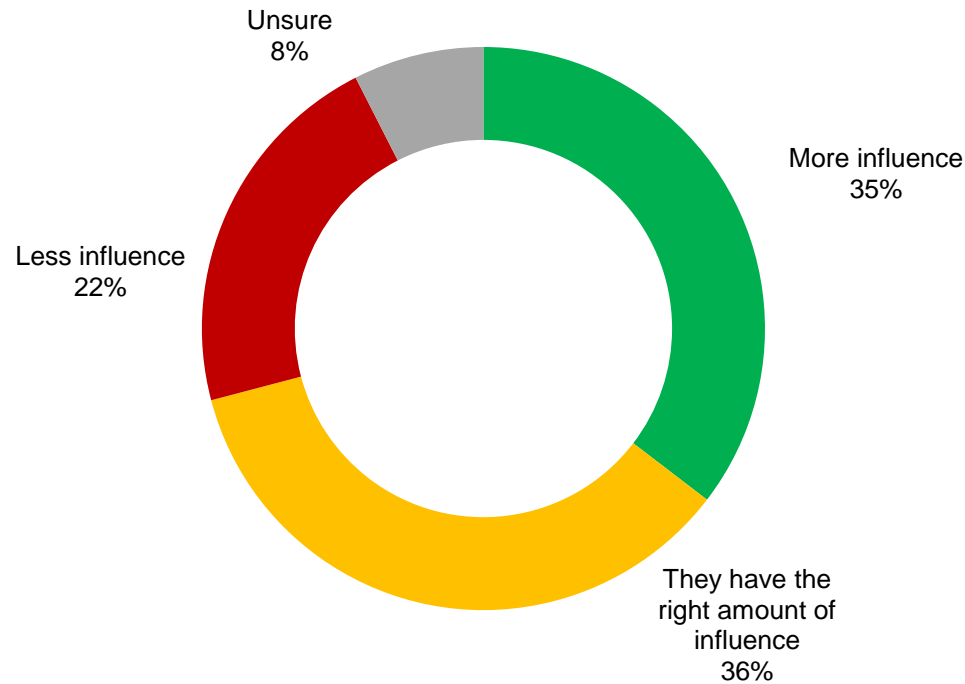


**\*Note: Charts may not add up to 100 due to rounding**

**QUESTION** – Thinking of possible paths forward, would you prefer that the Northern Gateway pipeline project be approved, delayed for further review or not approved?

# *Influence of Aboriginal Groups*

Source: Nanos Research, RDD dual frame random telephone survey, May 27-31, 2014, n=500 British Columbians, accurate 4.4 percentage points plus or minus, 19 times out of 20.

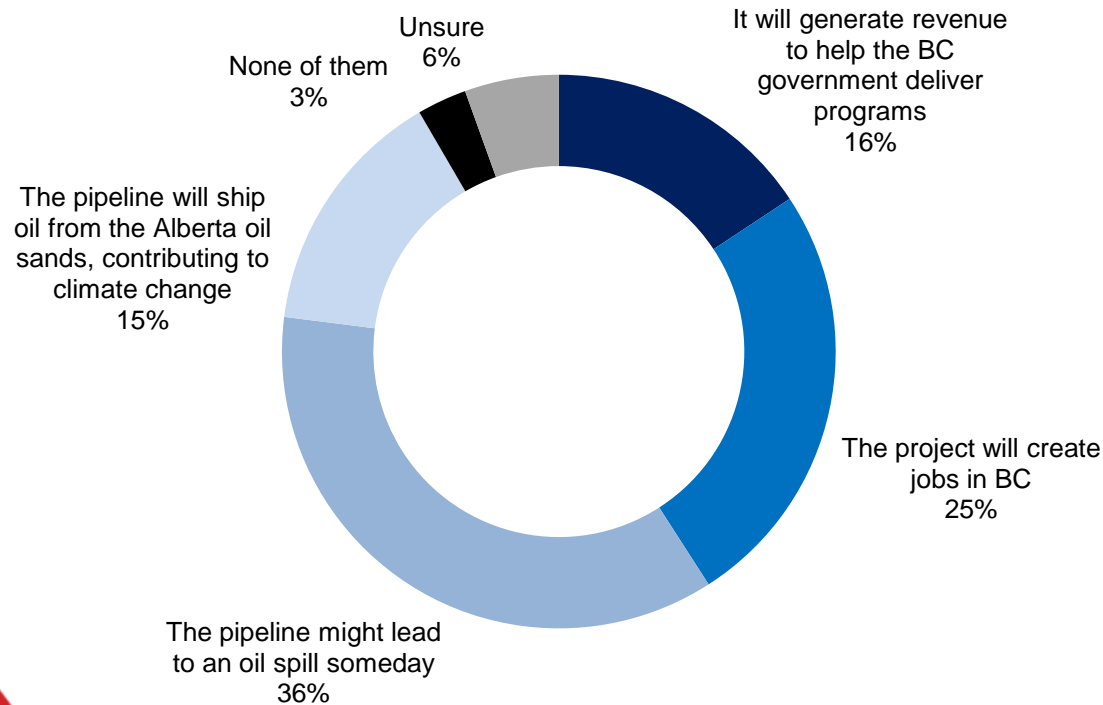


**\*Note: Charts may not add up to 100 due to rounding**

**QUESTION** – Should Aboriginal groups have more influence, less influence, or do they have the right amount of influence as to whether the Northern Gateway Pipeline is allowed to proceed?

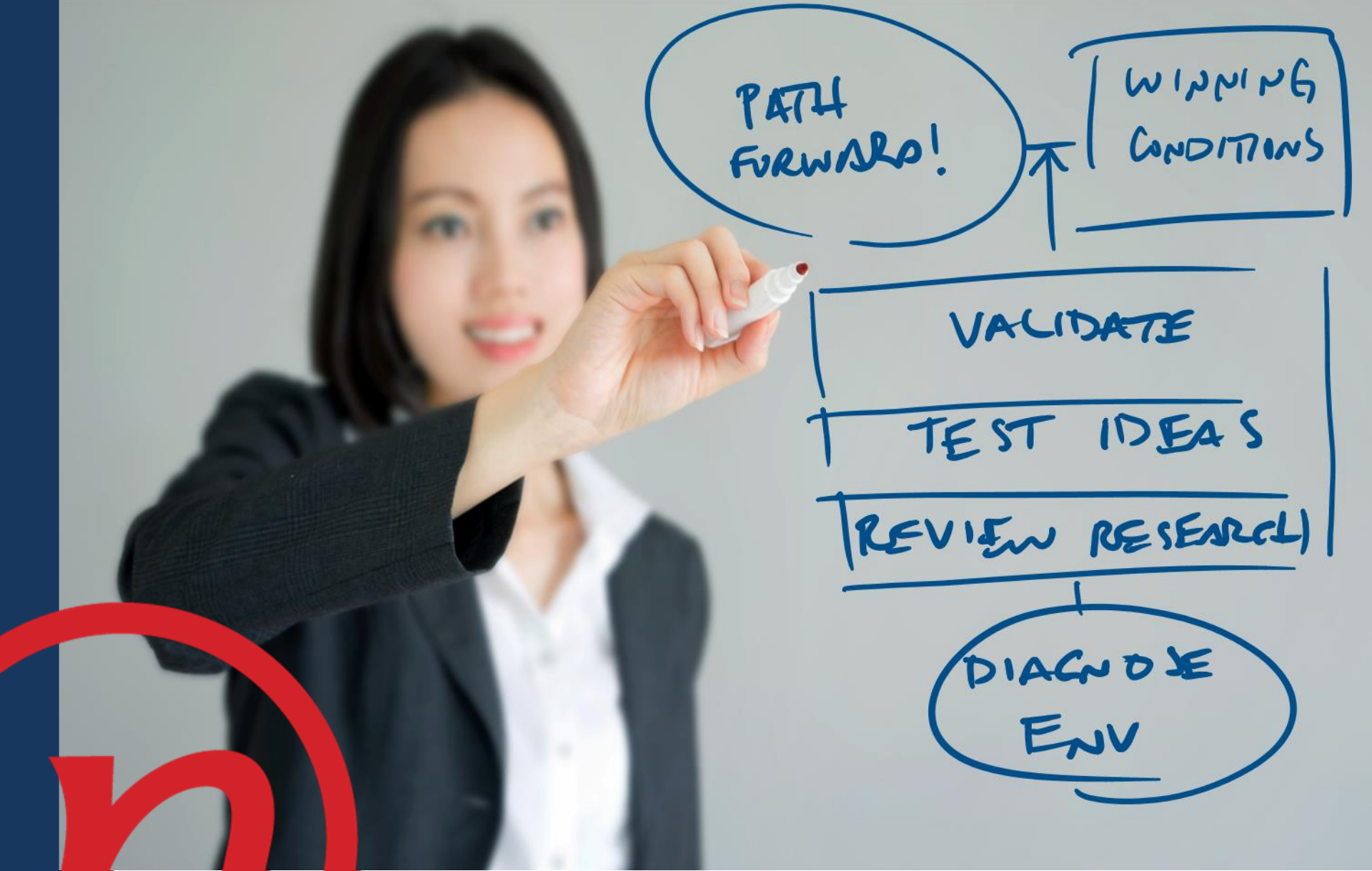
# Views on the Proposed Pipeline

Source: Nanos Research, RDD dual frame random telephone survey, May 27-31, 2014, n=500 British Columbians, accurate 4.4 percentage points plus or minus, 19 times out of 20.



**\*Note: Charts may not add up to 100 due to rounding**

**QUESTION –** Which of the following, if any, best represents your view of the proposed Northern Gateway Pipeline?



# Methodology



# Methodology

This random telephone survey of 500 British Columbians was conducted between May 27<sup>th</sup> and 31<sup>st</sup>, 2014 by Nanos Research. The dual frame sample included both land- and cell-lines across BC. The results were statistically checked and weighted by age and gender using the latest Census information and the sample was geographically stratified to be representative of BC.

The margin of error for a random survey of 500 British Columbians is  $\pm 4.4$  percentage points, 19 times out of 20.

The research was conducted by Nanos Research and commissioned by Bloomberg News. The questions were cooperatively designed by Nanos Research and Bloomberg News together

The study was a stand alone study conducted for Bloomberg by Nanos with no other questions other than those listed in the tabulations with the question order as presented in the tabulations. This first part of a two part series has all the questions in the first section of the questions in the order they are presented. Part 2 will include the last two content questions of the study. Non-content demographic questions were included at the end of the questionnaire to profile respondents and to weight the data.

Individuals called using random digit dialling and were called up to five times by Nanos and 10 percent of the fieldwork was monitored/validated in accordance with industry standards.

Note: Charts may not add up to 100 due to rounding.

# 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



## 2014-525 – BLOOMBERG-NANOS NORTHERN GATEWAY – STAT SHEET – PART 1 of 2

With regards to the Northern Gateway project, a proposed pipeline to bring oil to the Pacific Coast from Alberta's oil sands, are the following stakeholders credible, somewhat credible, somewhat not credible or not credible on the issue?  
[Randomize questions 1 thru 5]

			Gender			Age				
			British Columbia 2014-05	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 1 - The Harper federal government	Total	Unwgt N	500	250	250	55	62	74	106	203
		Wgt N	500	250	250	99	83	103	93	123
	Credible	%	21.3	27.1	15.6	23.4	9.7	20.0	23.0	27.4
	Somewhat credible	%	25.1	23.8	26.3	25.5	19.6	28.5	31.4	20.6
	Somewhat not credible	%	12.1	13.0	11.2	18.2	16.0	9.0	8.6	9.8
	Not credible	%	32.7	30.6	34.7	25.5	39.1	28.5	34.3	36.3
	Unsure	%	8.9	5.5	12.2	7.3	15.6	14.0	2.8	5.9

Random telephone (both land + cell) survey of 500 British Columbians conducted between May 27<sup>th</sup> and 31<sup>st</sup>, 2014.  
The margin of error for a survey of 500 British Columbians is  $\pm 4.4\%$ , 19 times out of 20.



## 2014-525 – BLOOMBERG-NANOS NORTHERN GATEWAY – STAT SHEET – PART 1 of 2

With regards to the Northern Gateway project, a proposed pipeline to bring oil to the Pacific Coast from Alberta's oil sands, are the following stakeholders credible, somewhat credible, somewhat not credible or not credible on the issue?

[Randomize questions 1 thru 5]

			Gender			Age				
			British Columbia 2014-05	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 2 - The Clark provincial government	Total	Unwgt N	500	250	250	55	62	74	106	203
		Wgt N	500	250	250	99	83	103	93	123
	Credible	%	21.5	26.8	16.2	23.2	10.8	21.2	25.8	24.4
	Somewhat credible	%	29.9	28.2	31.6	31.3	19.9	36.8	33.4	27.3
	Somewhat not credible	%	9.1	10.9	7.3	8.6	11.4	5.3	7.6	12.2
	Not credible	%	30.6	27.5	33.8	27.5	44.9	27.0	25.7	30.3
	Unsure	%	8.8	6.6	11.1	9.4	13.0	9.7	7.6	5.9

Random telephone (both land + cell) survey of 500 British Columbians conducted between May 27<sup>th</sup> and 31<sup>st</sup>, 2014.  
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## 2014-525 – BLOOMBERG-NANOS NORTHERN GATEWAY – STAT SHEET – PART 1 of 2

With regards to the Northern Gateway project, a proposed pipeline to bring oil to the Pacific Coast from Alberta's oil sands, are the following stakeholders credible, somewhat credible, somewhat not credible or not credible on the issue?  
[Randomize questions 1 thru 5]

			Gender			Age				
			British Columbia 2014-05	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 3 - Enbridge, the company proposing the pipeline	Total	Unwgt N	500	250	250	55	62	74	106	203
		Wgt N	500	250	250	99	83	103	93	123
	Credible	%	26.7	30.3	23.2	26.9	19.4	27.3	27.1	30.9
	Somewhat credible	%	21.9	23.7	20.0	14.4	18.1	28.1	28.5	20.2
	Somewhat not credible	%	11.3	12.2	10.5	14.4	13.2	8.0	11.6	10.3
	Not credible	%	29.4	27.4	31.4	31.1	35.0	21.2	27.3	32.7
	Unsure	%	10.6	6.3	15.0	13.3	14.3	15.4	5.6	5.9

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## 2014-525 – BLOOMBERG-NANOS NORTHERN GATEWAY – STAT SHEET – PART 1 of 2

With regards to the Northern Gateway project, a proposed pipeline to bring oil to the Pacific Coast from Alberta's oil sands, are the following stakeholders credible, somewhat credible, somewhat not credible or not credible on the issue?  
[Randomize questions 1 thru 5]

			Gender			Age				
			British Columbia 2014-05	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 4 - Environmental groups in BC	Total	Unwgt N	500	250	250	55	62	74	106	203
		Wgt N	500	250	250	99	83	103	93	123
	Credible	%	42.0	38.0	45.9	51.1	41.9	39.5	40.7	37.7
	Somewhat credible	%	32.8	32.7	32.9	34.5	24.2	32.1	41.9	31.0
	Somewhat not credible	%	6.2	9.3	3.1	1.7	8.2	5.3	6.4	9.1
	Not credible	%	10.7	13.5	8.0	5.4	11.9	13.4	8.4	13.8
	Unsure	%	8.3	6.5	10.1	7.3	13.8	9.7	2.7	8.5

Random telephone (both land + cell) survey of 500 British Columbians conducted between May 27<sup>th</sup> and 31<sup>st</sup>, 2014.  
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## 2014-525 – BLOOMBERG-NANOS NORTHERN GATEWAY – STAT SHEET – PART 1 of 2

With regards to the Northern Gateway project, a proposed pipeline to bring oil to the Pacific Coast from Alberta's oil sands, are the following stakeholders credible, somewhat credible, somewhat not credible or not credible on the issue?  
[Randomize questions 1 thru 5]

			Gender			Age				
			British Columbia 2014-05	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 5 - Aboriginal leaders in BC	Total	Unwgt N	500	250	250	55	62	74	106	203
		Wgt N	500	250	250	99	83	103	93	123
	Credible	%	40.8	36.3	45.4	53.8	29.2	37.8	43.2	39.1
	Somewhat credible	%	30.1	29.7	30.6	26.3	35.2	28.5	31.8	30.0
	Somewhat not credible	%	5.4	8.6	2.3	3.4	1.7	7.7	8.4	5.5
	Not credible	%	12.8	14.3	11.2	5.8	24.2	9.4	10.1	15.6
	Unsure	%	10.8	11.0	10.6	10.7	9.7	16.6	6.5	9.9

Random telephone (both land + cell) survey of 500 British Columbians conducted between May 27<sup>th</sup> and 31<sup>st</sup>, 2014.  
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## 2014-525 – BLOOMBERG-NANOS NORTHERN GATEWAY – STAT SHEET – PART 1 of 2

			Gender			Age				
			British Columbia 2014-05	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 6 - Thinking of possible paths forward, would you prefer that the Northern Gateway pipeline project be approved, delayed for further review or not approved	Total	Unwgt N	500	250	250	55	62	74	106	203
		Wgt N	500	250	250	99	83	103	93	123
	Approved	%	29.4	37.7	21.0	21.5	21.6	29.5	27.0	42.5
	Delayed for further review	%	32.7	27.2	38.2	38.4	35.4	36.7	36.3	20.2
	Not approved	%	34.0	31.6	36.4	36.7	40.0	27.0	33.9	33.8
	Unsure	%	4.0	3.5	4.4	3.4	3.0	6.8	2.9	3.4

			Gender			Age				
			British Columbia 2014-05	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 7 - Should Aboriginal groups have more influence, less influence, or do they have the right amount of influence as to whether the Northern Gateway Pipeline is allowed to proceed	Total	Unwgt N	500	250	250	55	62	74	106	203
		Wgt N	500	250	250	99	83	103	93	123
	More influence	%	35.4	29.2	41.7	64.1	29.8	31.0	26.6	26.7
	Less influence	%	21.6	28.0	15.2	8.8	24.6	18.5	28.8	26.8
	They have the right amount of influence	%	35.5	36.1	34.8	27.1	35.6	39.4	39.7	35.6
	Unsure	%	7.5	6.7	8.3	.0	9.9	11.1	4.9	10.9

Random telephone (both land + cell) survey of 500 British Columbians conducted between May 27<sup>th</sup> and 31<sup>st</sup>, 2014.  
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## 2014-525 – BLOOMBERG-NANOS NORTHERN GATEWAY – STAT SHEET – PART 1 of 2

			Gender			Age				
			British Columbia 2014-05	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 8 - Which one of the following, if any, best represents your view of the proposed Northern Gateway Pipeline?	Total	Unwgt N	500	250	250	55	62	74	106	203
		Wgt N	500	250	250	99	83	103	93	123
	It will generate revenue to help the BC government deliver programs	%	15.7	21.0	10.4	17.6	9.7	14.5	17.0	18.1
	The project will create jobs in BC	%	25.2	30.1	20.3	21.3	16.6	33.5	29.1	24.2
	The pipeline might lead to an oil spill someday	%	36.1	28.0	44.1	33.2	36.9	37.1	36.1	36.9
	The pipeline will ship oil from the Alberta oil sands, contributing to climate change	%	14.6	11.8	17.3	22.3	22.3	8.1	13.1	9.8
	None of them	%	2.9	3.5	2.4	3.8	.0	2.6	2.8	4.6
	Unsure	%	5.5	5.6	5.4	1.7	14.5	4.1	1.9	6.4

Random telephone (both land + cell) survey of 500 British Columbians conducted between May 27<sup>th</sup> and 31<sup>st</sup>, 2014.  
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