

*Tracking the views on the Keystone XL Pipeline  
Released October 9, 2014*



## ***Support for Approving the Keystone Pipeline Project has Improved Slightly in Canada since Last December***

Canadians have largely heard of the Keystone Pipeline project (96%) and the current survey indicates that perceptions have improved slightly since the previous survey.

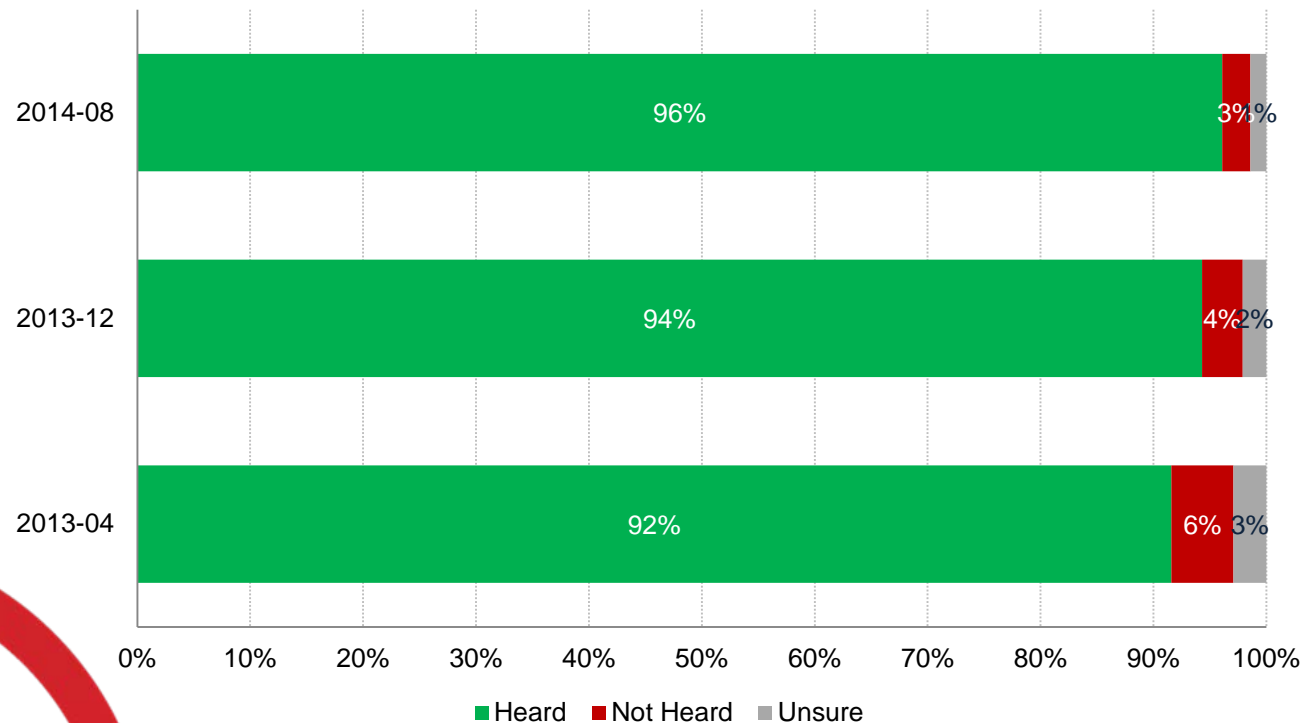
When it comes to overall perceptions of the Pipeline Project a slim minority have positive impressions (53%) with 28% positive and 25% are somewhat positive. In comparison, the overall positive score was 47% in December of 2013 and 60% in April of 2013. Residents of the Prairies are the most favourable and the Prairies and B.C. residents were the most likely to move to a more positive view since the last survey.

Consistent with the overall favourability result, 34% support and 23% somewhat support the Canadian government approving the project. This is up slightly from December of 2013.

The survey was a National Nanos RDD dual frame hybrid telephone and online random survey of 1,000 Canadians conducted between August 24th and 28th, 2014.

# Project Awareness – Canada

Source: Nanos Research, RDD Dual Frame Hybrid Telephone and Online Survey, August 24 to 28, 2014, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.  
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.



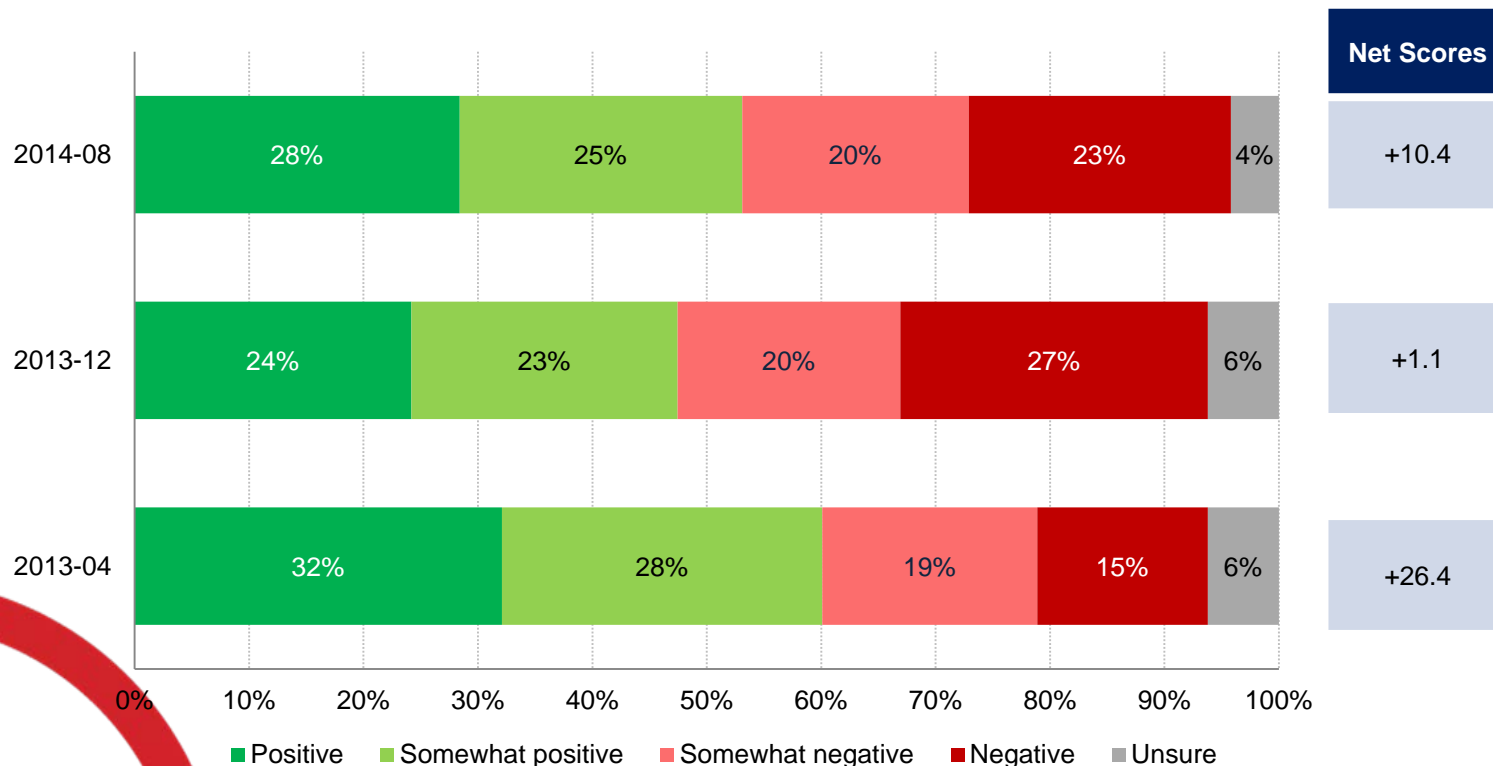
**QUESTION** – Have you heard or not heard of the Keystone Pipeline project which is a pipeline system to transport synthetic crude oil and diluted bitumen from the Alberta oil sands in Canada to the United States?

# Impressions – Canada

Source: Nanos Research, RDD Dual Frame Hybrid Telephone and Online Survey, August 24 to 28, 2014, n=960 accurate 3.2 percentage points plus or minus, 19 times out of 20.

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 – [IF HAVE HEARD OF THE PROJECT]** Do you have a positive, somewhat positive, somewhat negative or negative view of the Keystone Pipeline project?

# Impressions – Regional Net Scores

Source: Nanos Research, RDD Dual Frame Hybrid Telephone and Online Survey, August 24 to 28, 2014, n=960 accurate 3.2 percentage points plus or minus, 19 times out of 20.

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.

Net Scores			
Subgroups	Aug-14	Dec-13	Apr-13
Canada	+10.4 (n=960)	+1.1 (n=964)	+26.4 (n=928)
Atlantic Canada	+1.4 (n=92)	+12.8 (n=97)	+26.1 (n=96)
Quebec	+6.2 (n=293)	+5.0 (n=235)	+3.7 (n=212)
Ontario	+2.5 (n=293)	+2.4 (n=294)	+30.2 (n=282)
Prairies	+35.6 (n=191)	+10.1 (n=193)	+44.8 (n=194)
British Columbia	+6.4 (n=147)	-27.3 (n=145)	+28.2 (n=143)

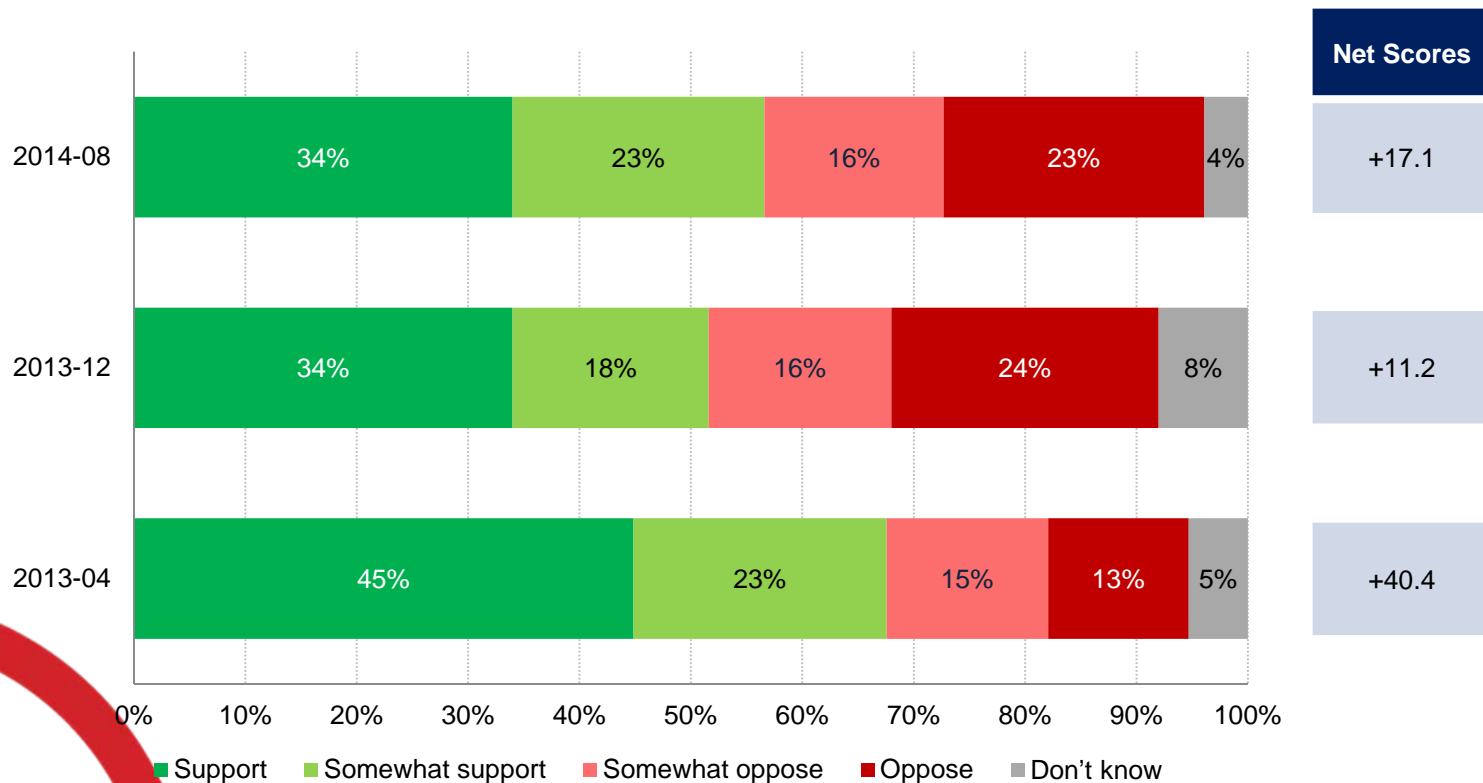
**QUESTION – [IF HAVE HEARD OF THE PROJECT]** Do you have a positive, somewhat positive, somewhat negative or negative view of the Keystone Pipeline project?

# Supporting the Project – Canada

Source: Nanos Research, RDD Dual Hybrid Telephone and Online Survey, August 24 to 28, 2014, n=960, accurate 3.2 percentage points plus or minus, 19 times out of 20.

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 – [IF HAVE HEARD OF THE PROJECT]** 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?

# Support – Regional Net Scores

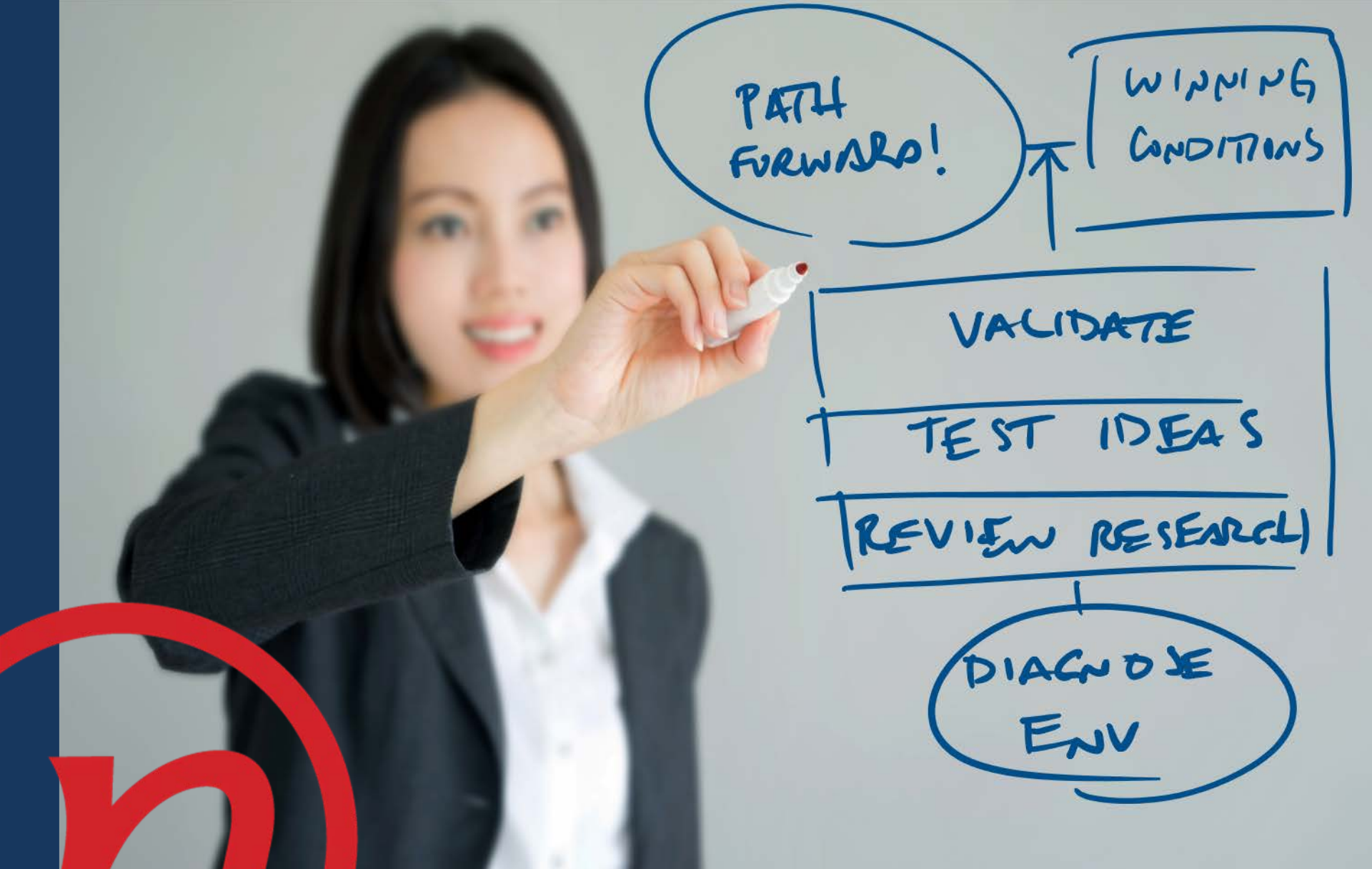
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Source: Nanos Research, National Telephone Random Survey, April 6 to 9, 2013, n=1,013, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Scores			
Subgroups	Aug-14	Dec-13	Apr-13
Canada	+17.1 (n=960)	+11.2 (n=964)	+40.4 (n=928)
Atlantic Canada	+1.2 (n=92)	+25.0 (n=97)	+41.4 (n=96)
Quebec	+12.6 (n=238)	+11.6 (n=235)	+22.8 (n=212)
Ontario	+12.9 (n=293)	+13.1 (n=294)	+42.6 (n=282)
Prairies	+40.7 (n=191)	+19.9 (n=193)	+44.5 (n=194)
British Columbia	+11.6 (n=147)	-14.3 (n=145)	+55.8 (n=143)

**QUESTION – [IF HAVE HEARD OF THE PROJECT]** 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 August 24<sup>th</sup> and 28<sup>th</sup>, 2014 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  $\pm 3.1$  percentage points 19 times out of 20

The results from the previous wave are from:

National Nanos RDD dual frame hybrid telephone and online random survey of 1,000 Canadians conducted between December 14<sup>th</sup> and 16<sup>th</sup>, 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  $\pm 3.1$  percentage points 19 times out of 20

A national dual frame (land- and cell-line sample) **random telephone survey of 1,013 Canadians conducted between April 6<sup>th</sup> and 9<sup>th</sup>, 2013.** The results were statistically checked and weighted using the latest Census data. A random survey of 1,013 Canadians is accurate  $\pm 3.1$  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.

The research was 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.

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# Tabulations

Confidential



## 2014-579 - KEYSTONE PIPELINE – STAT SHEET

		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 2014-08	1000	96.0	2.5	1.4
	Atlantic Canada	100	92.0	5.9	2.1
	Quebec	250	95.0	2.6	2.3
	Ontario	300	97.5	1.6	.9
	Prairies	200	95.4	3.0	1.6
	British Columbia	150	98.2	1.4	.5
Gender	Male	488	99.1	.3	.7
	Female	512	93.1	4.7	2.2
Age	18 to 29	205	93.4	4.7	1.9
	30 to 39	169	92.7	5.4	1.9
	40 to 49	208	97.0	1.8	1.2
	50 to 59	178	97.1	1.1	1.8
	60 plus	239	99.0	.3	.6

Nanos conducted a RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between August 24<sup>th</sup> and 28<sup>th</sup>, 2014. The sample included both land- and cell-lines across Canada. The margin of error for a random survey of 1,000 Canadians is  $\pm 3.1$  percentage points, 19 times out of 20.

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## 2014-579 - KEYSTONE PIPELINE – STAT SHEET

		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 2014-08	960	28.4	24.7	19.8	22.9	4.2
	Atlantic Canada	92	16.2	32.0	19.1	27.7	5.0
	Quebec	238	22.2	28.2	22.9	21.3	5.3
	Ontario	293	28.4	20.6	16.4	30.1	4.5
	Prairies	191	42.7	23.6	19.3	11.4	2.9
	British Columbia	147	27.3	24.3	22.5	22.7	3.2
Gender	Male	483	34.8	25.3	16.8	20.1	3.0
	Female	477	21.9	24.2	22.8	25.6	5.4
Age	18 to 29	192	25.1	25.7	23.3	23.1	2.7
	30 to 39	157	27.6	27.2	17.0	23.6	4.7
	40 to 49	202	28.3	19.6	20.1	24.0	8.0
	50 to 59	173	26.7	23.4	19.5	27.7	2.6
	60 plus	236	32.9	27.7	18.7	17.6	3.1

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## 2014-579 - KEYSTONE PIPELINE – STAT SHEET

		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 2014-08	960	34.0	22.6	16.1	23.4	3.9
	Atlantic Canada	92	25.1	22.4	18.6	27.7	6.2
	Quebec	238	26.8	27.0	19.0	22.2	5.0
	Ontario	293	33.3	21.3	13.3	28.4	3.7
	Prairies	191	49.3	19.5	14.8	13.3	3.0
	British Columbia	147	32.4	22.4	17.2	26.0	2.0
Gender	Male	483	39.3	23.1	13.8	21.1	2.7
	Female	477	28.5	22.2	18.5	25.7	5.1
Age	18 to 29	192	27.9	25.3	23.2	19.6	4.1
	30 to 39	157	33.8	22.0	14.2	25.4	4.7
	40 to 49	202	30.9	22.5	13.5	26.9	6.2
	50 to 59	173	32.0	21.9	15.5	27.7	2.9
	60 plus	236	43.1	21.6	14.4	19.1	1.8

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