



Oil Sands Summary

submitted by Nanos, November, 2014 (Submission 2014-612)

Canadians Divided about the Oil Sands Project

Research suggests a net decline in favourable impressions over past five years.

Just under half of Canadians have either a favourable (19.6%) or somewhat favourable (25.5%) view of the oil sands project in Alberta. Almost the same number are either unfavourable (31%) or somewhat unfavourable (17.0%). Men and residents of the Prairie provinces tend to have more favourable views.

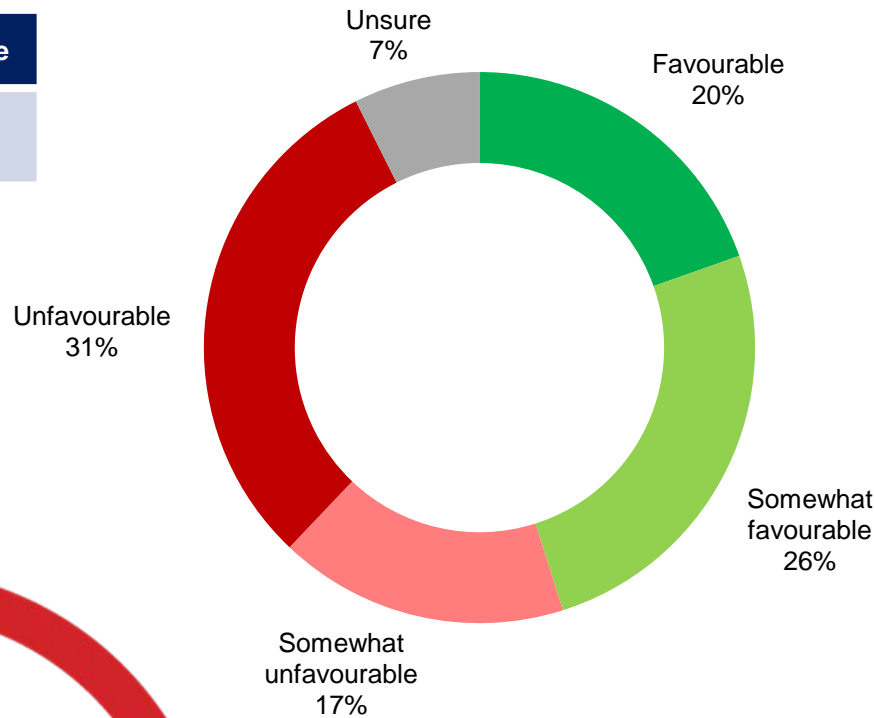
Those who are favourable toward the oil sands project explain their positive attitude in terms of the economic benefits (28.2%), job benefits (15.4%), the reduced dependence on foreign oil (13.3%) and the need for oil. Those who are unfavourable are so because of the environmental issues (72.0%).

Over the past five years the net impact has been a worsening of attitudes toward the oil sands according to Canadians. While 40.8% say their attitudes are unchanged, 35.0% say their attitudes have worsened. Only 19.0% say their attitudes have improved.

Favourability Towards Oil Sands Project

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 15th to 18th, 2014, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
-2.4



Subgroups	Favourable/ Somewhat favourable
Atlantic (n=100)	35.4%
Quebec (n=250)	43.8%
Ontario (n=300)	46.1%
Prairies (n=200)	57.8%
British Columbia (n=150)	35.2%
Male (n=500)	52.9%
Female (n=500)	37.4%
18 to 29 (n=206)	43.0%
30 to 39 (n=169)	42.0%
40 to 49 (n=208)	48.0%
50 to 59 (n=178)	41.3%
60 plus (n=239)	49.6%

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

QUESTION – Do you have a favourable, somewhat favourable, somewhat unfavourable or unfavourable impression of the oil sands project in Alberta?

Impressions of Oil Sands Project

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 15th to 18th, 2014, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

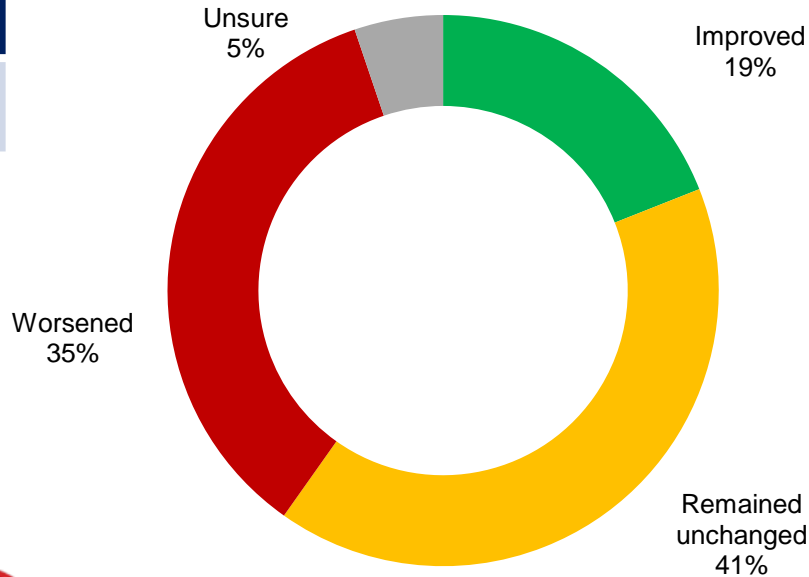
Top Mentions *	Favourable (n=195)	Somewhat favourable (n=256)	Somewhat unfavourable (n=169)	Unfavourable (n=305)	Unsure (n=75)	Total (n=1,000)
It is bad for the environment	0.0%	8.2%	53.3%	72.0%	1.3%	33.2%
It is good for the economy	28.2%	25.1%	1.2%	0.0%	2.7%	12.3%
Reduce dependence on foreign oil/support domestic production	13.3%	13.3%	0.0%	0.0%	0.0%	6.0%
It creates jobs	15.4%	9.4%	0.0%	0.0%	1.3%	5.5%
We need oil	11.8%	9.8%	2.4%	0.0%	2.7%	5.4%
There are insufficient regulations/lack of monitoring	0.0%	1.2%	10.1%	2.3%	0.0%	2.7%
From what I have heard in the media	0.0%	1.2%	4.1%	3.6%	4.0%	2.4%
Other	4.6%	2.4%	5.3%	5.9%	2.7%	4.4%
Unsure	17.4%	20.8%	16.6%	10.9%	77.3%	20.6%

** for full list see the appended tabulations*

QUESTION – Why do you have that opinion? [Open-ended]

Impressions Over the Past Five Years

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 15th to 18th, 2014, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Improved
Atlantic (n=100)	16.2%
Quebec (n=250)	18.8%
Ontario (n=300)	17.5%
Prairies (n=200)	24.6%
British Columbia (n=150)	16.6%
Male (n=500)	22.3%
Female (n=500)	15.6%
18 to 29 (n=206)	13.6%
30 to 39 (n=169)	15.4%
40 to 49 (n=208)	22.4%
50 to 59 (n=178)	20.0%
60 plus (n=239)	22.4%

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

QUESTION – Would you say that your impression of the oil sands project in Alberta has improved, remained unchanged or has worsened over the past five years?



Methodology

Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between November 15th and 18th, 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 by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

The research was commissioned by Nanos Research.

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



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		Question 1 – Do you have a favourable, somewhat favourable, somewhat unfavourable or unfavourable impression of the oil sands project in Alberta?					
		Total	Favourable	Somewhat favourable	Somewhat unfavourable	Unfavourable	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2014-11	1000	19.6	25.5	17.0	30.5	7.4
	Atlantic Canada	100	13.2	22.2	19.7	34.8	10.0
	Quebec	250	19.1	24.7	18.1	30.3	7.9
	Ontario	300	17.5	28.6	15.4	30.5	8.0
	Prairies	200	30.1	27.7	16.6	20.5	5.1
	British Columbia	150	15.0	20.2	17.2	41.0	6.6
Gender	Male	500	25.0	27.9	17.4	26.2	3.4
	Female	500	14.2	23.2	16.6	34.7	11.4
Age	18 to 29	206	19.6	23.4	11.8	40.1	5.1
	30 to 39	169	16.9	25.1	17.4	29.4	11.2
	40 to 49	208	20.6	27.4	19.2	25.4	7.3
	50 to 59	178	17.9	23.4	19.1	32.0	7.6
	60 plus	239	21.9	27.7	17.7	26.1	6.5

Nanos conducted a RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between November 15th and 18th, 2014. 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.



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Question 2 - Why do you have that opinion? * Question 1 - Do you have a favourable, somewhat favourable, somewhat unfavourable or unfavourable impression of the oil sands project in Alberta?

		Question 1 - Do you have a favourable, somewhat favourable, somewhat unfavourable or unfavourable impression of the oil sands project in Alberta?					
		Favourable	Somewhat favourable	Somewhat unfavourable	Unfavourable	Unsure	Total
It is good for the economy	Count	55	64	2	0	2	123
		28.2%	25.1%	1.2%	0.0%	2.7%	12.3%
It is bad for the environment	Count	0	21	90	219	1	331
		0.0%	8.2%	53.3%	72.0%	1.3%	33.2%
I don't trust the information that has been provided	Count	0	2	7	7	5	21
		0.0%	0.8%	4.1%	2.3%	6.7%	2.1%
I live in Alberta	Count	5	3	0	0	1	9
		2.6%	1.2%	0.0%	0.0%	1.3%	0.9%
There are insufficient regulations/lack of monitoring	Count	0	3	17	7	0	27
		0.0%	1.2%	10.1%	2.3%	0.0%	2.7%
Reduce dependence on foreign oil/I support domestic production	Count	26	34	0	0	0	60
		13.3%	13.3%	0.0%	0.0%	0.0%	6.0%
From what I have heard in the media	Count	0	3	7	11	3	24
		0.0%	1.2%	4.1%	3.6%	4.0%	2.4%
We need oil	Count	23	25	4	0	2	54
		11.8%	9.8%	2.4%	0.0%	2.7%	5.4%
It creates jobs	Count	30	24	0	0	1	55
		15.4%	9.4%	0.0%	0.0%	1.3%	5.5%
I have worked there/I know people who have worked there	Count	9	7	0	2	0	18
		4.6%	2.7%	0.0%	0.7%	0.0%	1.8%
Need to explore alternative energy sources	Count	0	4	5	7	0	16
		0.0%	1.6%	3.0%	2.3%	0.0%	1.6%

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		Question 1 - Do you have a favourable, somewhat favourable, somewhat unfavourable or unfavourable impression of the oil sands project in Alberta?					Total
		Favourable	Somewhat favourable	Somewhat unfavourable	Unfavourable	Unsure	Total
There have been improvements in operations in order to minimize negative environmental impacts	Count	4	6	0	0	0	10
		2.1%	2.4%	0.0%	0.0%	0.0%	1.0%
Other	Count	9	6	9	18	2	44
		4.6%	2.4%	5.3%	5.9%	2.7%	4.4%
Unsure	Count	34	53	28	33	58	206
		17.4%	20.8%	16.6%	10.9%	77.3%	20.6%
Total	Count	195	256	169	305	75	1000
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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		Question 3 - Would you say that your impression of the oil sands project in Alberta has improved, remained unchanged or has worsened over the past five years?				
		Total	Improved	Remained unchanged	Worsened	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage
Region	Canada 2014-11	1000	19.0	40.8	35.0	5.2
	Atlantic Canada	100	16.2	32.3	41.4	10.2
	Quebec	250	18.8	42.9	32.3	6.0
	Ontario	300	17.5	42.2	35.6	4.8
	Prairies	200	24.6	46.9	25.8	2.7
	British Columbia	150	16.6	32.3	46.1	4.9
Gender	Male	500	22.3	43.1	32.0	2.5
	Female	500	15.6	38.6	37.9	7.9
Age	18 to 29	206	13.6	43.0	39.1	4.3
	30 to 39	169	15.4	45.1	33.3	6.2
	40 to 49	208	22.4	37.1	34.6	5.9
	50 to 59	178	20.0	37.1	37.9	5.0
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