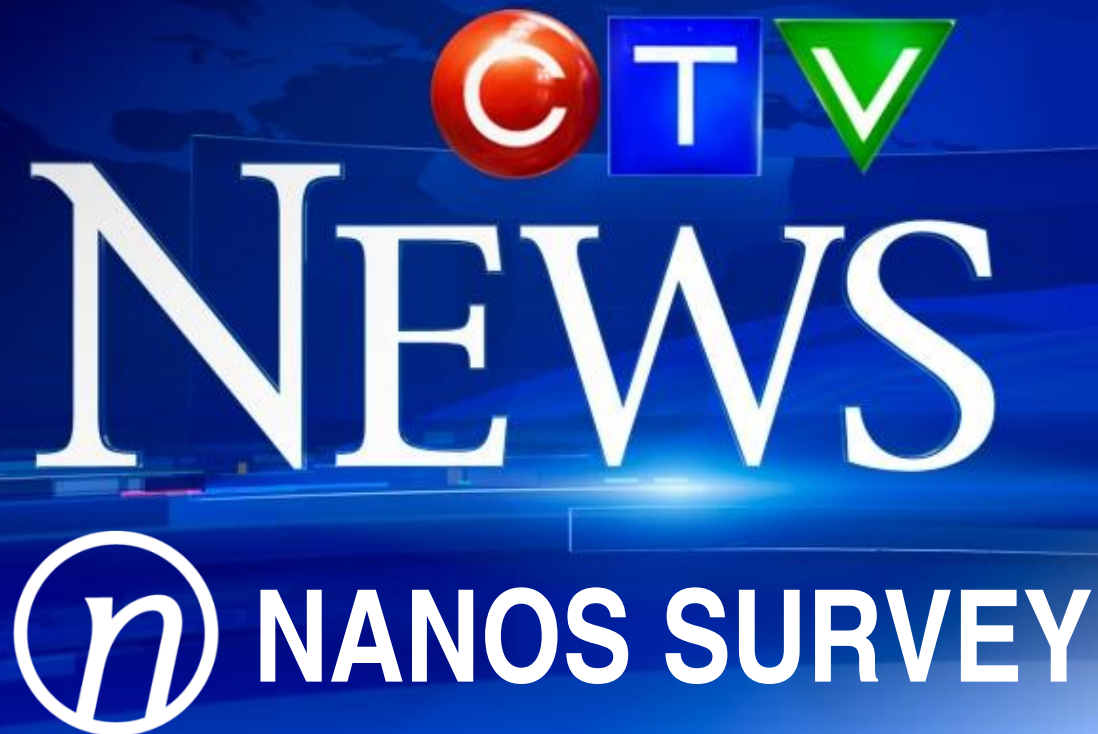


Strong support for incentives to use alternative energy sources – pipelines seen as comparatively safe

National survey released April 2016

Project 2016-812



Canadians feel energy resources can be transported safely through pipelines – a strong majority support incentives for using alternative energy

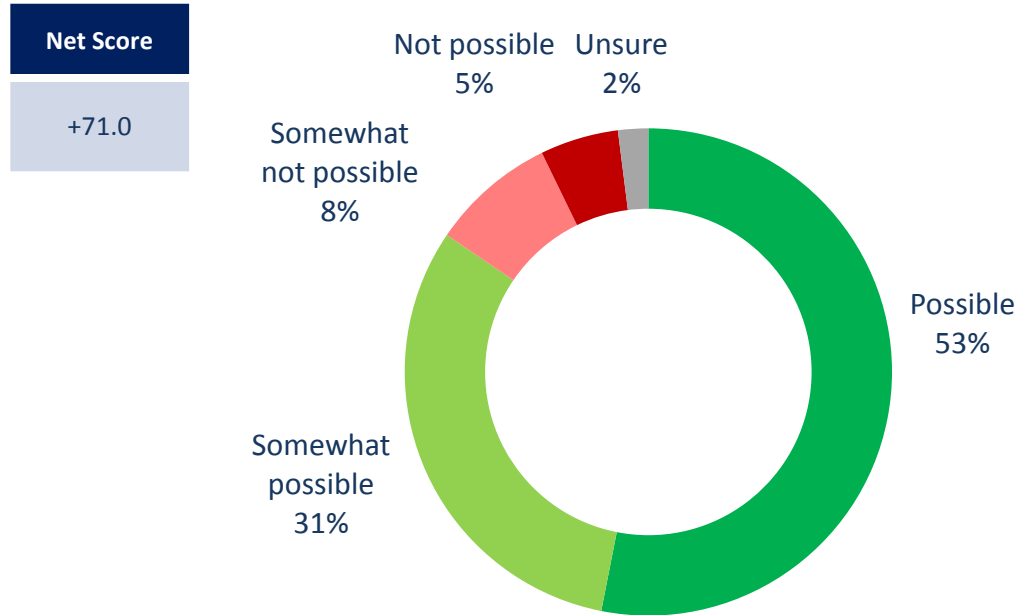
Canadians felt it's possible or somewhat possible for Canada to transport its energy resources safely, and the majority feel that pipelines are the best way to do so. Canadians generally feel that provinces should not be able to stop the construction of projects such as pipelines. A little over half of Canadians are satisfied or somewhat satisfied with the job being done by the government's regulatory agencies to protect public safety when transporting oil and natural gas, and a strong majority support or somewhat support the government offering incentives to Canadians to use alternative energy sources.

- **Support for incentivizing Canadians to use alternative energy** – Nearly nine in ten Canadians either support (59%) or somewhat support (27%) the federal government offering incentives to Canadians to use alternative energy sources for their home and travel (i.e. Electric cars, solar panels). Six percent somewhat oppose this while seven percent oppose this, and one percent is unsure.
- **Transporting energy resources safely** – When asked about whether Canada can transport its energy resources while protecting the environment, the majority of Canadians said they think it is either possible (53%) or somewhat possible (31%) for Canada to do this. Eight percent said this is somewhat not possible, five percent said it is not possible, and two percent of Canadians are unsure.
- **Safest mode of transport** – Seven in ten Canadians (70%) said that pipelines are the most appropriate and safest mode of transport for Canada's oil and natural gas. Eight percent said rail cars were the safest, four percent said truck transport and one percent said tanker ships. Sixteen percent are unsure.
- **Satisfaction with regulatory policies** – Just over half of Canadians are either satisfied (18%) or somewhat satisfied (34%) with the job the government regulatory agencies are doing protecting public safety when it comes to the transport of oil and natural gas. Twenty-two percent say they are somewhat dissatisfied, while 18% are dissatisfied with the job they are doing. Eight percent of Canadians are unsure.
- **Provinces being able to stop pipelines** – Thirty-eight percent of Canadians disagree that provinces should be able to stop plans for a national infrastructure project like a pipeline, while 21% somewhat disagree. Almost two fifths of Canadians either agree (18%) or somewhat agree (21%) with this, while two percent are unsure.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between March 31st and April 4th, 2016 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. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

Safe transport of energy resources

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 4th, 2016, n=1000 accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

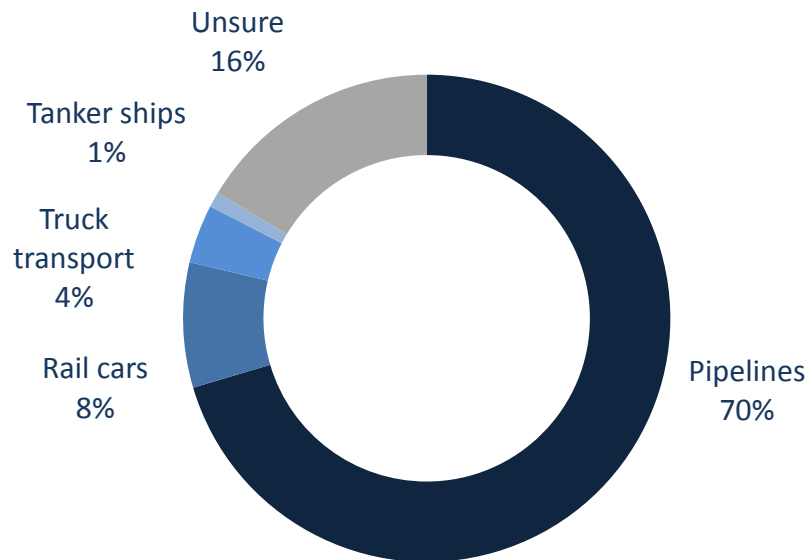
Subgroups	Possible/ Somewhat possible
Atlantic (n=100)	89.3%
Quebec (n=250)	82.3%
Ontario (n=300)	80.7%
Prairies (n=200)	94.1%
British Columbia (n=150)	80.2%
Male (n=500)	87.8%
Female (n=500)	81.3%
18 to 29 (n=171)	82.6%
30 to 39 (n=169)	81.2%
40 to 49 (n=218)	84.5%
50 to 59 (n=224)	84.7%
60 plus (n=218)	88.6%

QUESTION – Do you think it is possible, somewhat possible, somewhat not possible or not possible for Canada to transport its energy resources while protecting the environment?



Transporting oil and natural gas

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 4th, 2016, n=1000 accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

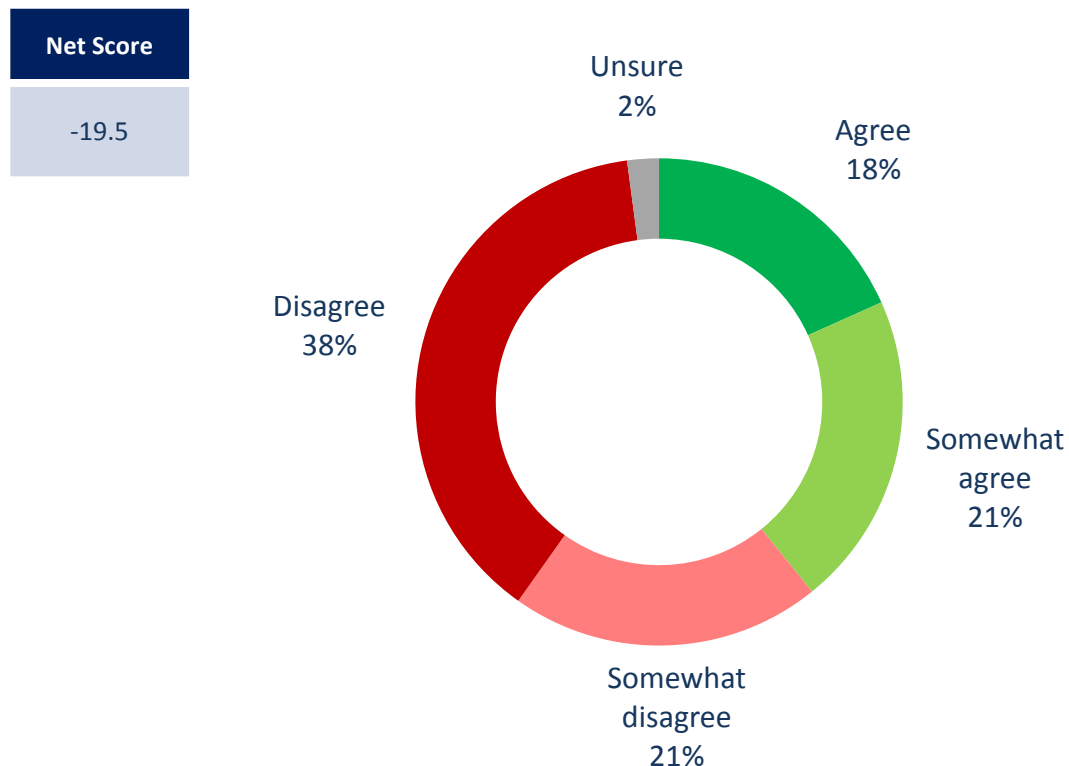
Subgroups	Pipelines
Atlantic (n=100)	75.0%
Quebec (n=250)	66.0%
Ontario (n=300)	68.1%
Prairies (n=200)	81.4%
British Columbia (n=150)	64.5%
Male (n=500)	75.8%
Female (n=500)	65.0%
18 to 29 (n=171)	51.0%
30 to 39 (n=169)	66.3%
40 to 49 (n=218)	71.0%
50 to 59 (n=224)	78.3%
60 plus (n=218)	83.5%

QUESTION – What mode of transport of oil and natural gas do you believe is the most appropriate and safest for Canada? [RANDOMIZE]



Provinces' ability to stop plans for a national infrastructure project

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 4th, 2016, n=1000 accurate 3.1 percentage points plus or minus, 19 times out of 20.



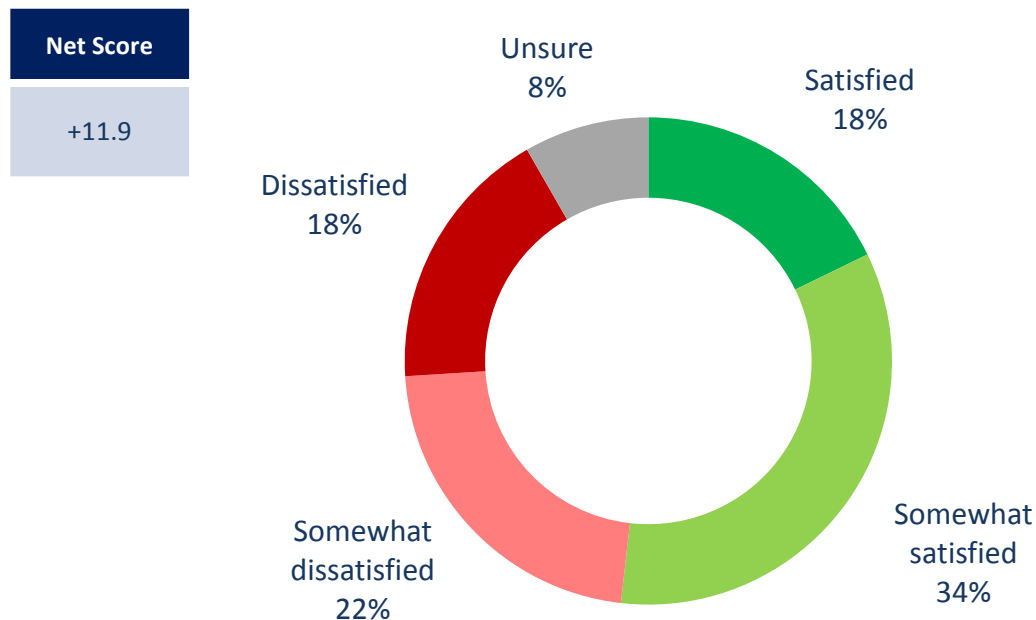
Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	35.3%
Quebec (n=250)	47.9%
Ontario (n=300)	34.6%
Prairies (n=200)	22.6%
British Columbia (n=150)	58.3%
Male (n=500)	36.1%
Female (n=500)	42.2%
18 to 29 (n=171)	51.7%
30 to 39 (n=169)	45.5%
40 to 49 (n=218)	37.2%
50 to 59 (n=224)	38.6%
60 plus (n=218)	26.1%

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

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree that a province should be able to stop plans for a national infrastructure project like a pipeline?

Canadians' level of satisfaction of government regulatory agencies

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 4th, 2016, n=1000 accurate 3.1 percentage points plus or minus, 19 times out of 20.



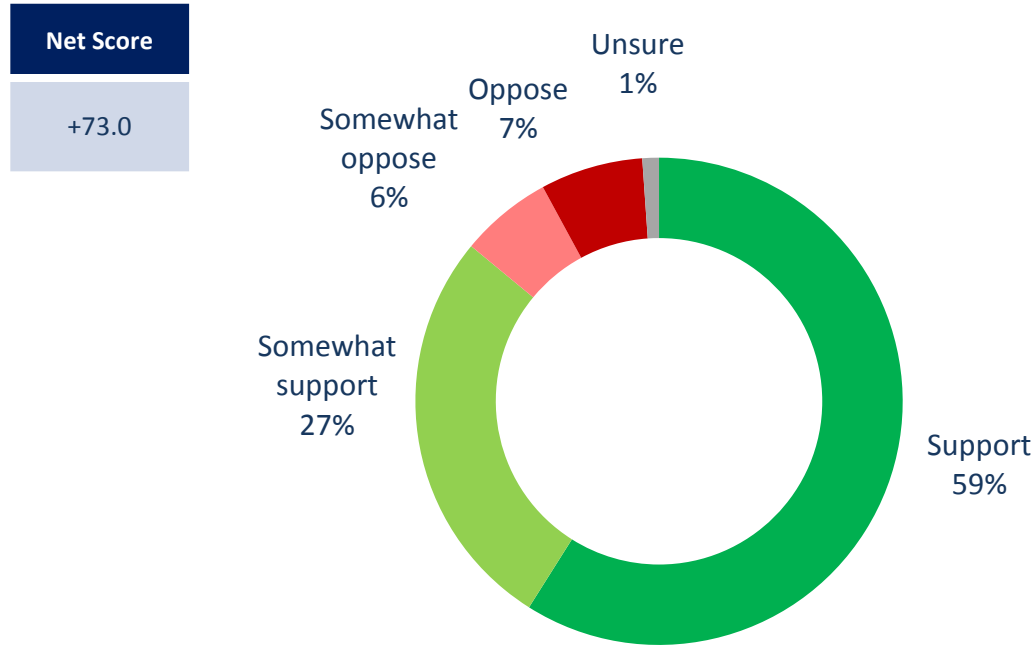
Subgroups	Satisfied/ Somewhat satisfied
Atlantic (n=100)	63.1%
Quebec (n=250)	46.4%
Ontario (n=300)	48.4%
Prairies (n=200)	63.5%
British Columbia (n=150)	44.2%
Male (n=500)	54.5%
Female (n=500)	49.2%
18 to 29 (n=171)	40.1%
30 to 39 (n=169)	53.0%
40 to 49 (n=218)	49.1%
50 to 59 (n=224)	52.6%
60 plus (n=218)	62.9%

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

QUESTION – Are you satisfied, somewhat satisfied, somewhat dissatisfied or dissatisfied with the job government regulatory agencies are doing protecting public safety when it comes to transport of oil and natural gas?

Federal government incentives to use alternative energy sources

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, March 31st to April 4th, 2016, n=1000 accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

Subgroups	Support/ Somewhat support
Atlantic (n=100)	90.2%
Quebec (n=250)	85.7%
Ontario (n=300)	82.1%
Prairies (n=200)	86.0%
British Columbia (n=150)	91.0%
Male (n=500)	85.0%
Female (n=500)	86.9%
18 to 29 (n=171)	90.2%
30 to 39 (n=169)	85.2%
40 to 49 (n=218)	83.7%
50 to 59 (n=224)	84.7%
60 plus (n=218)	85.7%

QUESTION – Do you support, somewhat support, somewhat oppose, or oppose the federal government offering incentives to Canadians to use alternative energy sources for home and travel (i.e. electric cars, solar panels)?

Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between March 31st and April 4th, 2016 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 data presented in this research is part of a joint project by CTV News and Nanos Research.

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

Technical Note

Element	Description	Element	Description
Organization who commissioned the research	CTV	Weighting of Data	The results were weighted by age and gender using the latest Census information (2014) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Final Sample Size	1,000 Randomly selected individuals.	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Margin of Error	±3.1 percentage points, 19 times out of 20.	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell line could not participate.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Stratification	By age and gender using the latest Census information (2014) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Estimated Response Rate	19.1 percent, consistent with industry norms.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Demographics (Other)	Age, gender, education, income	Question Content	This was module three of an omnibus survey. The modules preceding these questions included top unprompted national issues of concern, and vote preferences.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Number of Calls/	Maximum of five call backs.	Survey Company	Nanos Research
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanosresearch.com Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.
Field Dates	March 31 st to April 4 th , 2016.		
Language of Survey	The survey was conducted in both English and French.		



NANOS SURVEY

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





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			Region						Gender		Age				
			Canada 2016-03	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question – Do you think it is possible, somewhat possible, somewhat not possible or not possible for Canada to transport its energy resources while protecting the environment?	Total	Unwgt N	1000	100	250	300	200	150	500	500	171	169	218	224	218
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
	Possible	%	53.1	55.1	44.8	48.3	71.4	51.2	59.1	47.2	42.0	51.7	50.2	56.4	63.9
	Somewhat possible	%	31.4	34.2	37.5	32.4	22.7	29.0	28.7	34.1	40.6	29.5	34.3	28.3	24.7
	Somewhat not possible	%	8.3	5.1	9.8	11.1	3.1	9.2	6.6	10.0	8.3	9.4	8.7	10.2	5.6
	Not possible	%	5.2	4.3	6.5	4.9	1.2	9.8	5.1	5.4	7.4	7.9	4.8	3.2	3.3
	Unsure	%	2.0	1.3	1.5	3.4	1.6	.8	.6	3.3	1.7	1.6	2.0	1.9	2.5

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between March 31st and April 4th, 2016. 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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			Region					Gender		Age					
			Canada 2016-03	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question – What mode of transport of oil and natural gas do you believe is the most appropriate and safest for Canada? [RANDOMIZE]	Total	Unwgt N	1000	100	250	300	200	150	500	500	171	169	218	224	218
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
	Pipelines	%	70.4	75.0	66.0	68.1	81.4	64.5	75.8	65.0	51.0	66.3	71.0	78.3	83.5
	Rail cars	%	8.3	6.1	9.2	9.3	7.7	7.0	7.6	8.9	14.5	11.3	7.9	4.0	4.4
	Truck transport	%	3.9	5.3	4.9	3.3	1.2	6.0	2.8	5.0	7.6	5.3	4.2	.7	2.0
	Tanker ships	%	1.0	1.7	2.1	.6	.3	.0	.7	1.3	1.0	.7	1.9	1.4	.0
	Unsure	%	16.4	11.9	17.7	18.7	9.3	22.5	13.1	19.8	26.0	16.5	15.1	15.5	10.1

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			Region					Gender		Age					
			Canada 2016- 03	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia			18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question – Do you agree, somewhat agree, somewhat disagree or disagree that a province should be able to stop plans for a national infrastructure project like a pipeline?	Total	Unwgt N	1000	100	250	300	200	150	500	500	171	169	218	224	218
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
	Agree	%	18.3	12.2	26.0	17.4	5.3	28.4	16.2	20.3	26.0	22.8	14.9	18.1	11.5
	Somewhat agree	%	20.9	23.1	21.9	17.2	17.3	29.9	19.9	21.9	25.7	22.7	22.3	20.5	14.6
	Somewhat disagree	%	20.6	20.0	17.8	23.2	26.0	13.4	19.3	21.9	21.7	20.6	21.0	16.4	22.5
	Disagree	%	38.1	42.2	30.2	40.7	50.5	27.0	43.2	33.0	23.0	32.1	39.7	44.3	49.4
	Unsure	%	2.1	2.5	4.2	1.4	1.0	1.3	1.4	2.9	3.6	1.8	2.2	.8	2.1

			Region					Gender		Age					
			Canada 2016- 03	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia			18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question – Are you satisfied, somewhat satisfied, somewhat dissatisfied or dissatisfied with the job government regulatory agencies are doing protecting public safety when it comes to transport of oil and natural gas?	Total	Unwgt N	1000	100	250	300	200	150	500	500	171	169	218	224	218
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
	Satisfied	%	17.8	21.4	10.2	18.0	27.4	14.6	19.6	16.0	15.7	24.0	15.7	16.0	18.3
	Somewhat satisfied	%	34.0	41.7	36.2	30.4	36.1	29.6	34.9	33.2	24.4	29.0	33.4	36.6	44.6
	Somewhat dissatisfied	%	22.2	15.6	25.6	22.3	18.9	25.0	21.9	22.5	25.3	20.2	24.5	26.0	16.1
	Dissatisfied	%	17.7	13.1	19.7	18.2	13.0	22.8	17.8	17.6	17.9	19.5	19.0	18.0	15.0
	Unsure	%	8.3	8.1	8.2	11.0	4.6	7.9	5.9	10.7	16.7	7.2	7.5	3.5	6.0

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between March 31st and April 4th, 2016. 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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			Region					Gender		Age					
			Canada 2016-03	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question – Do you support, somewhat support, somewhat oppose, or oppose the federal government offering incentives to Canadians to use alternative energy sources for home and travel (i.e. electric cars, solar panels)?	Total	Unwgt N	1000	100	250	300	200	150	500	500	171	169	218	224	218
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
	Support	%	58.9	70.7	58.7	54.5	50.0	72.2	57.8	60.0	69.0	59.9	59.4	55.9	51.4
	Somewhat support	%	27.0	19.5	27.0	27.6	36.0	18.8	27.2	26.9	21.2	25.3	24.3	28.8	34.3
	Somewhat oppose	%	6.1	5.3	7.0	6.4	7.8	2.4	6.6	5.7	2.1	7.0	6.2	6.4	8.7
	Oppose	%	6.8	4.5	6.5	10.3	5.4	3.9	7.3	6.4	5.1	7.3	7.7	8.9	5.7
	Unsure	%	1.1	.0	.8	1.1	.9	2.7	1.1	1.1	2.6	.5	2.3	.0	.0

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