

Public Opinion Research ▶▶

BREAKING ISSUES:
Pipeline Decisions

Methodology

- These are the findings of an Innovative Research Group (INNOVATIVE) poll conducted from December 1st to December 9th, 2016.
- This online survey of 1,801 Canadian adults was conducted using INNOVATIVE's Canada 20/20 national panel.
- The Canada 20/20 Panel is recruited from a wide variety of sources to reflect the age, gender, region and language characteristics of the country as a whole. This survey is administered to a series of randomly selected samples from the panel and weighted to n=1,200 to ensure that the overall sample composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.
- INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey and panel members can only complete a particular survey once.
- This is a representative sample. We have set targets to ensure we properly reflect key regional and demographic distribution and then used weights to ensure we reflect the country properly. However, since the online survey was not a random probability based sample, a margin of error can not be calculated. The Marketing Research and Intelligence Association prohibits statements about margins of sampling error or population estimates with regard to most online panels.

Note: *Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

The Questions

The following questions were included as part of an annual syndicated study conducted by INNOVATIVE:

Earlier this week the federal government announced it was approving the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC and the Line 3 oil pipeline expansion that runs from Edmonton to Wisconsin. The federal government also announced it would not approve the proposed Northern Gateway oil pipeline that would run from Bruderheim, Alberta to Kitimat, BC. How closely have you been following the news about the federal government's decisions on these new oil pipeline projects in Canada?

- 01 Very closely
- 02 Somewhat closely
- 03 Not very closely
- 04 Not at all
- 98 Don't know

Below is a list of those three decisions. For each decision please indicate if you support or oppose the government's decision?

- 01 Strongly support
- 02 Somewhat support
- 03 Neither support nor oppose
- 04 Somewhat oppose
- 05 Strongly oppose
- 98 Don't Know

[RANDOMISE ITEMS]

1. Approving the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC
2. Approving the Line 3 oil pipeline expansion that runs from Edmonton to Wisconsin
3. Not approving the proposed Northern Gateway oil pipeline that would run from Bruderheim, Alberta to Kitimat, BC

From what you know about these three pipeline announcements, do you feel more or less favourable towards the federal government?

- 01 A lot more favourable
- 02 Somewhat more favourable
- 03 Neither more nor less favourable
- 04 Somewhat less favourable
- 05 A lot less favourable
- 98 Don't know

Segmentation: Where did respondents come from?

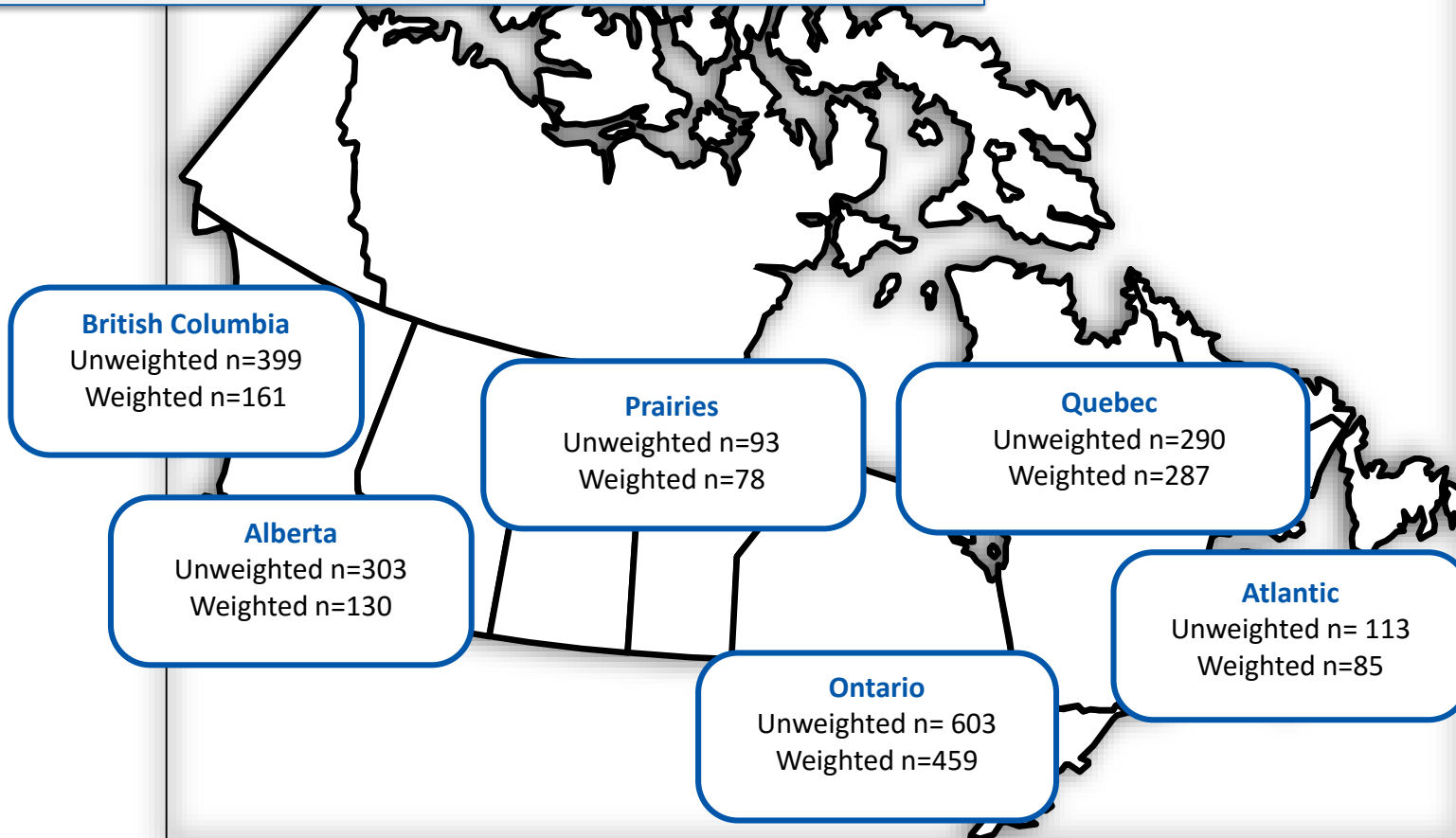
Regional groupings include:

- British Columbia (Yukon)
- Alberta (Northwest Territories)
- Prairie Region (Manitoba, Saskatchewan and Nunavut)
- Ontario
- Quebec
- Atlantic (PEI, New Brunswick, Nova Scotia and Newfoundland & Labrador)

National

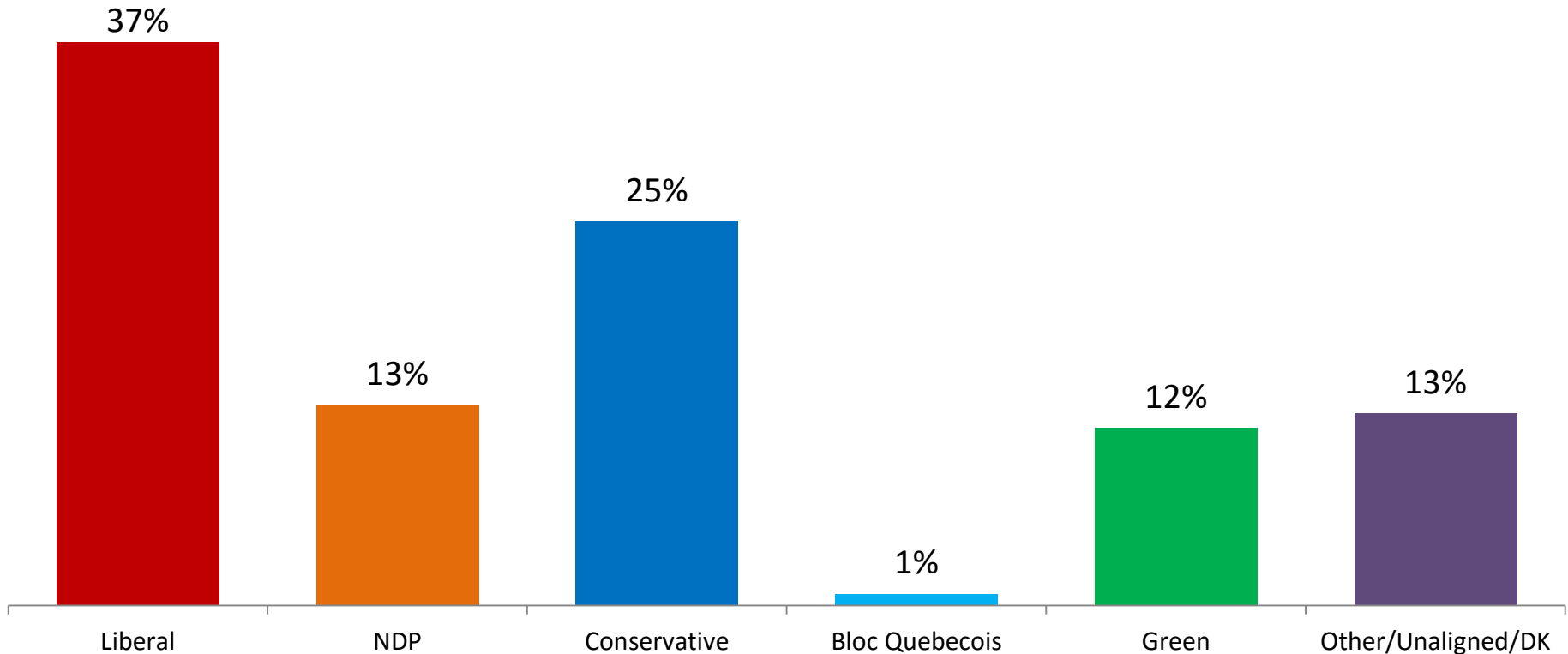
Unweighted n=1,200

Weighted n=1,801



Federal Party ID: a strong plurality identify themselves as Liberal, a quarter as Conservative, 1-in-8 as NDP

Q Thinking about politics in Canada, generally speaking, do you usually think of yourself as a...
[all respondents, n=1,200]

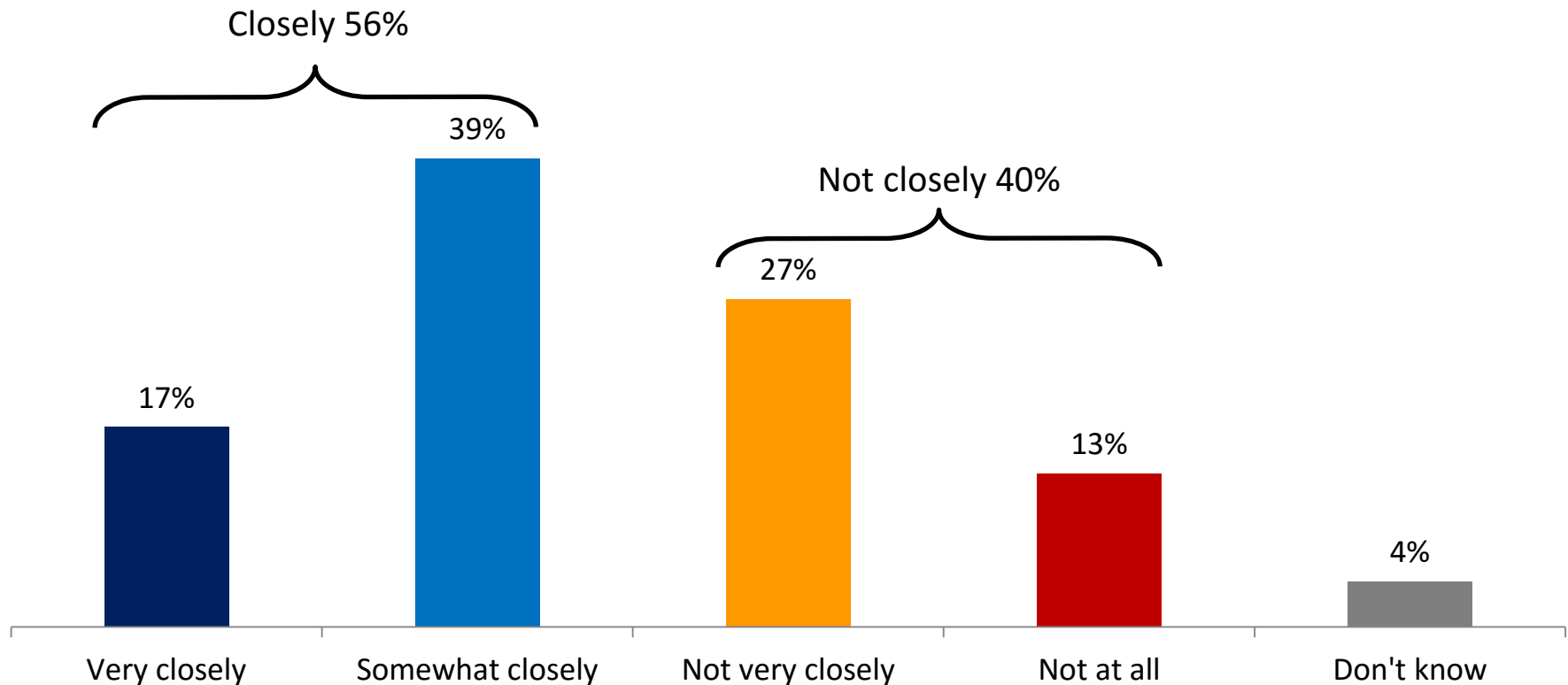


Awareness of decision on pipeline: a majority say they have been following the news at least somewhat closely



Earlier this week the federal government announced it was approving the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC and the Line 3 oil pipeline expansion that runs from Edmonton to Wisconsin. The federal government also announced it would not approve the proposed Northern Gateway oil pipeline that would run from Bruderheim, Alberta to Kitimat, BC. How closely have you been following the news about the federal government's decisions on these new oil pipeline projects in Canada?

[all respondents, n=1,200]



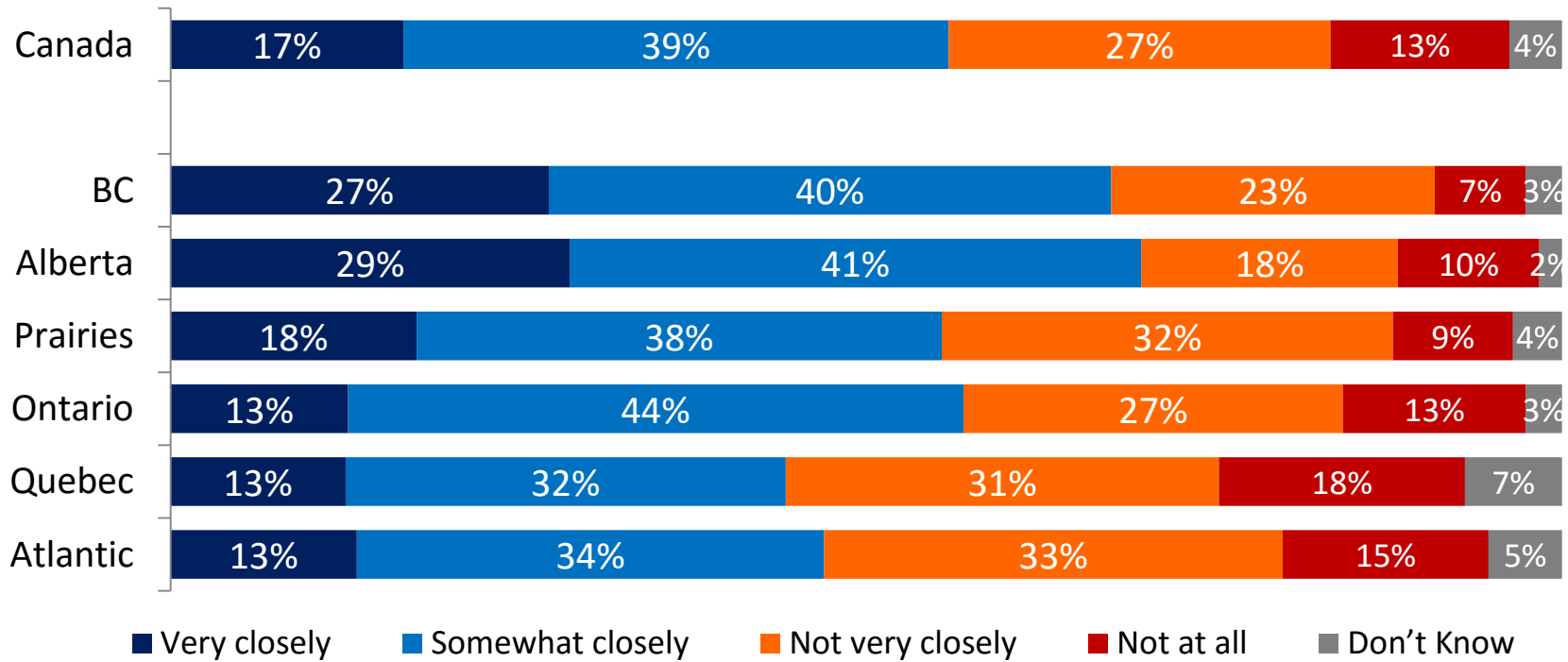
Regional awareness: 2-in-3 in BC and AB have followed the announcements at least somewhat closely; much lower in QC



Earlier this week the federal government announced it was approving the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC and the Line 3 oil pipeline expansion that runs from Edmonton to Wisconsin. The federal government also announced it would not approve the proposed Northern Gateway oil pipeline that would run from Bruderheim, Alberta to Kitimat, BC. How closely have you been following the news about the federal government's decisions on these new oil pipeline projects in Canada?

BY Region

[all respondents, n=1,200]



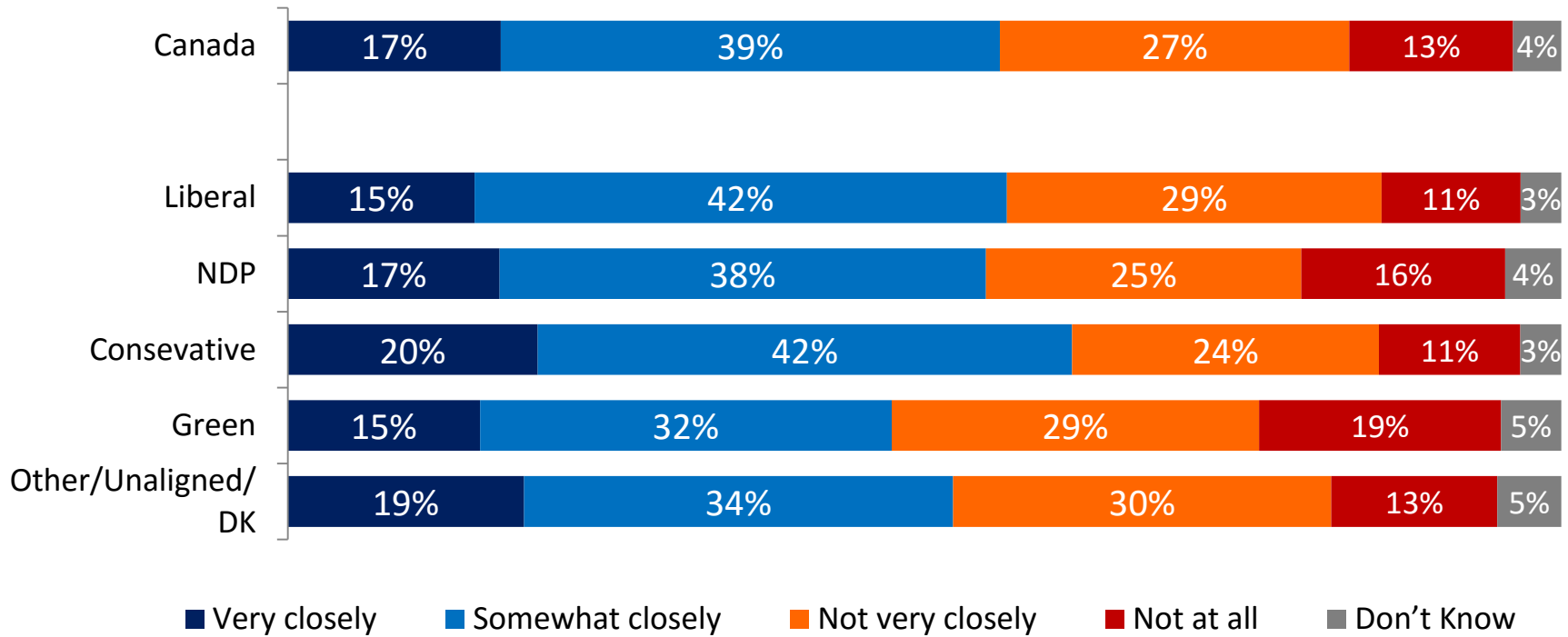
Awareness by Party ID: Conservatives follow the decisions a little more closely than Liberals



Earlier this week the federal government announced it was approving the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC and the Line 3 oil pipeline expansion that runs from Edmonton to Wisconsin. The federal government also announced it would not approve the proposed Northern Gateway oil pipeline that would run from Bruderheim, Alberta to Kitimat, BC. How closely have you been following the news about the federal government's decisions on these new oil pipeline projects in Canada?

BY Party ID

[all respondents, n=1,200]



Support for decision: there is more support than opposition for decisions, about 3-in-10 are ambivalent



Below is a list of those three decisions. For each decision please indicate if you support or oppose the government's decision?

[all respondents, n=1,200]

Approving the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC



Approving the Line 3 oil pipeline expansion that runs from Edmonton to Wisconsin



Not approving the proposed Northern Gateway oil pipeline that would run from Bruderheim, Alberta to Kitimat, BC



■ Strongly support

■ Somewhat support

■ Neither support nor oppose

■ Somewhat oppose

■ Strongly oppose

■ Don't know

Those who follow the announcement closely are more likely to support the government's decision



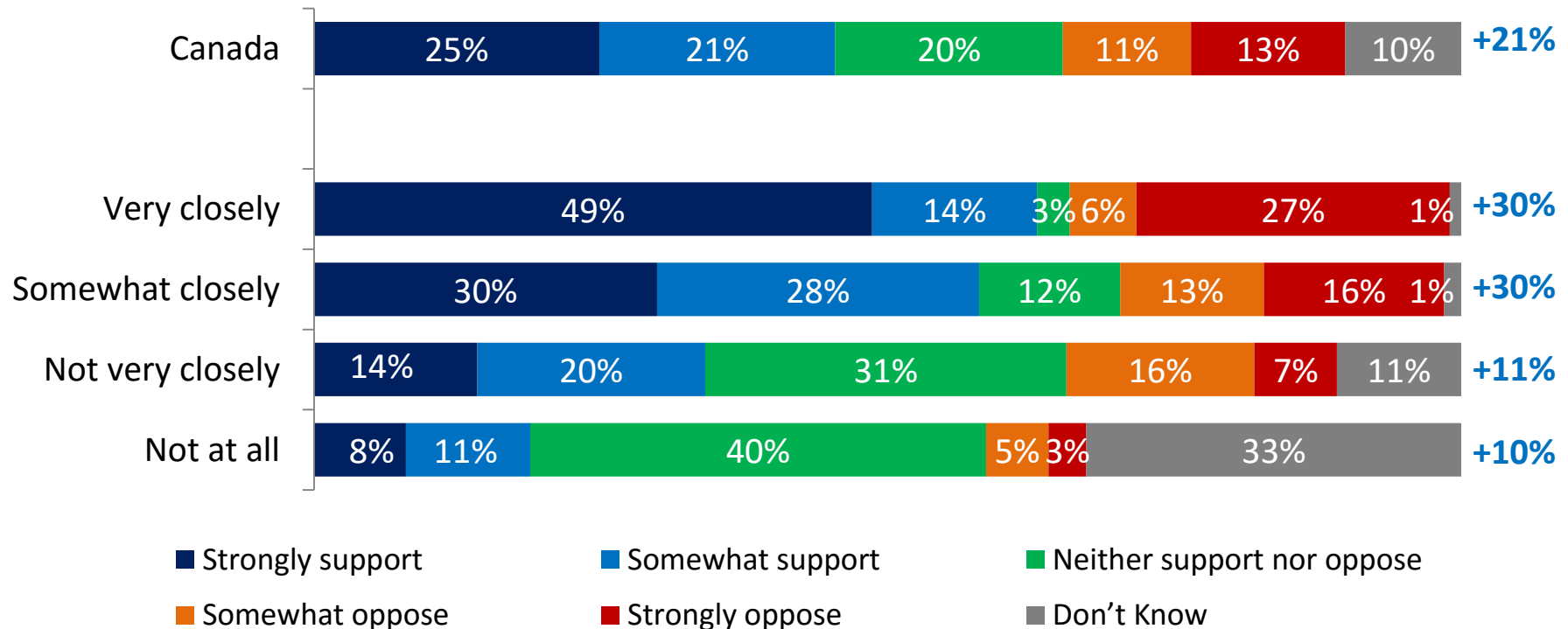
Below is a list of those three decisions. For each decision please indicate if you support or oppose the government's decision?

Approving the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC

BY How closely they follow the announcements on pipelines

[all respondents, n=1,200]

Net Support



Those who follow the announcement closely more likely to support the approval to Line 3 expansion



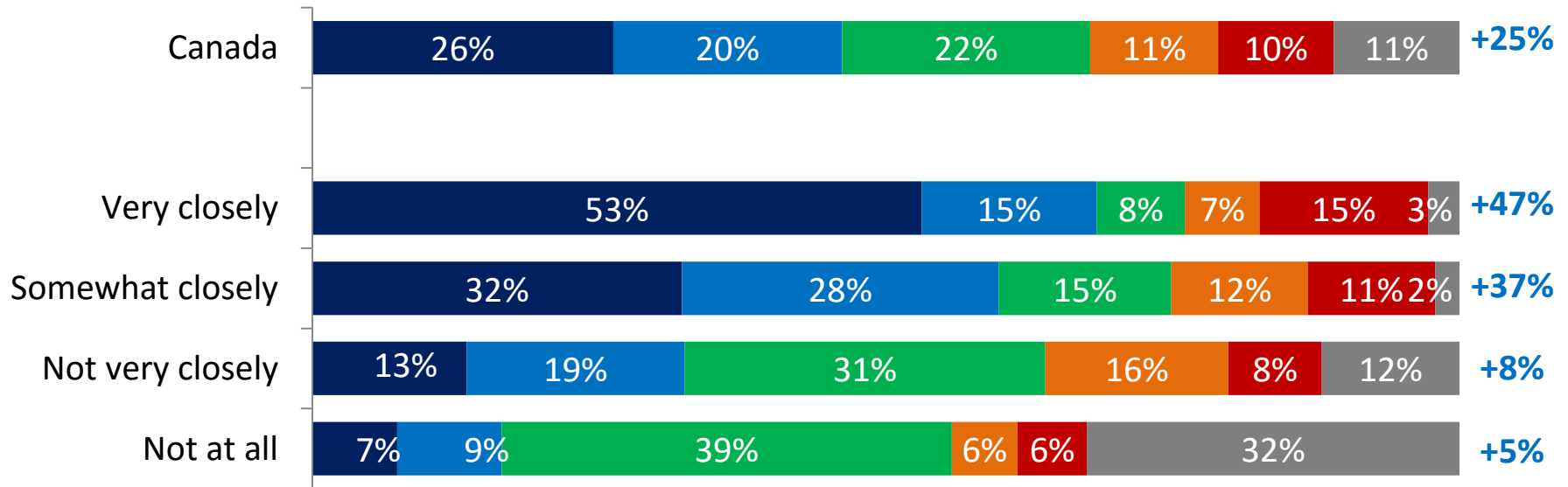
Below is a list of those three decisions. For each decision please indicate if you support or oppose the government's decision?

Approving the Line 3 oil pipeline expansion that runs from Edmonton to Wisconsin

BY How closely they follow the announcements on pipelines

[all respondents, n=1,200]

Net Support



- Strongly support
- Somewhat support
- Neither support nor oppose
- Somewhat oppose
- Strongly oppose
- Don't Know

Those who follow the announcement closely more likely to support the decision to reject the Northern Gateway



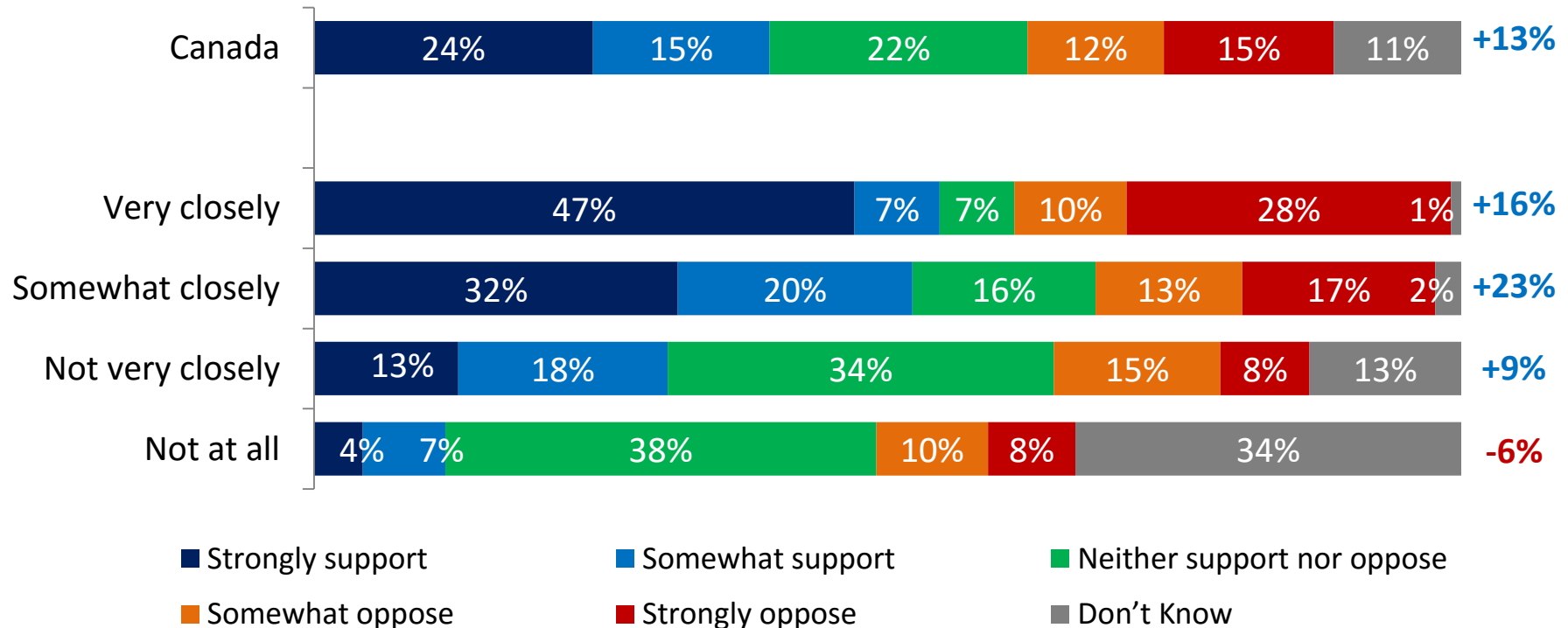
Below is a list of those three decisions. For each decision please indicate if you support or oppose the government's decision?

Not approving the proposed Northern Gateway oil pipeline that would run from Bruderheim, Alberta to Kitimat, BC

BY How closely they follow the announcements on pipelines

[all respondents, n=1,200]

Net Support



Support for approving Kinder Morgan pipeline is highest in Alberta (+66%), over half say 'strongly support'



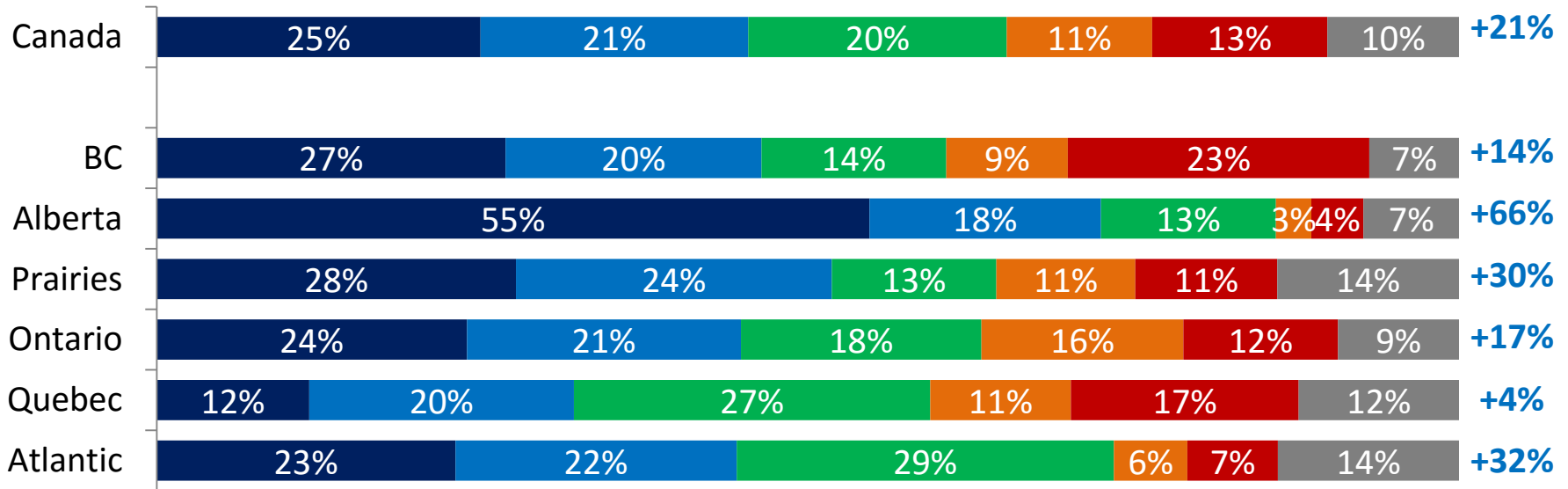
Below is a list of those three decisions. For each decision please indicate if you support or oppose the government's decision?

Approving the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC

BY Region

[all respondents, n=1,200]

Net Support



■ Strongly support
 ■ Somewhat support
 ■ Neither support nor oppose
■ Somewhat oppose
 ■ Strongly oppose
 ■ Don't know

Support for approving Line 3 pipeline is also highest in Alberta (+70%), over half say 'strongly support'



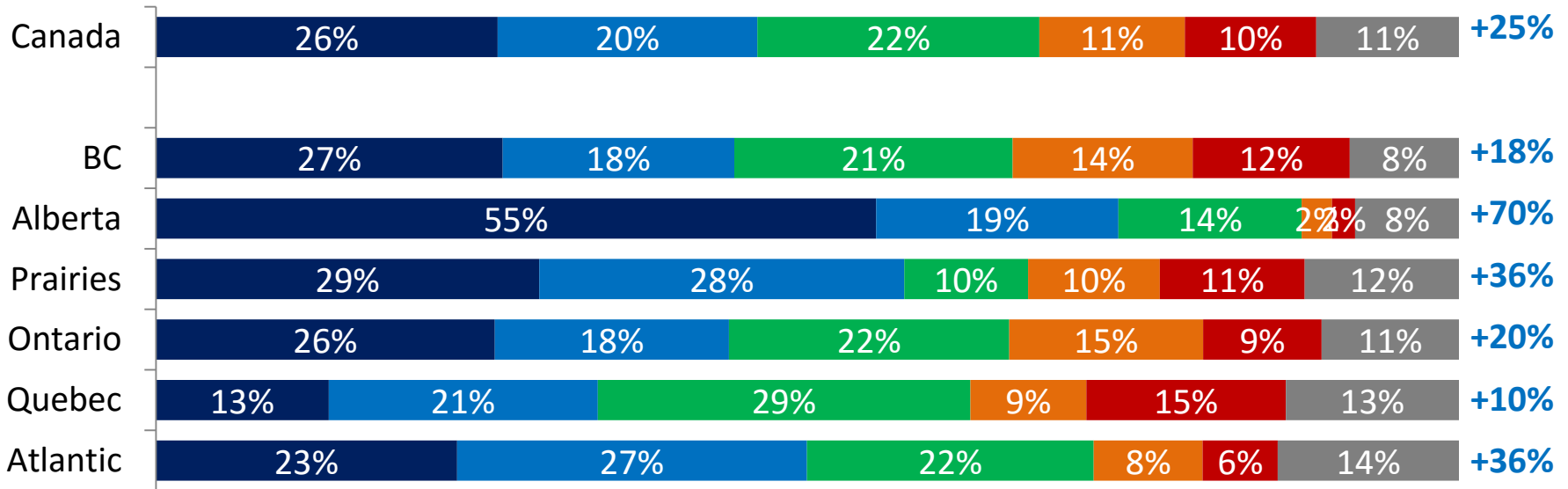
Below is a list of those three decisions. For each decision please indicate if you support or oppose the government's decision?

Approving the Line 3 oil pipeline expansion that runs from Edmonton to Wisconsin

BY Region

[all respondents, n=1,200]

Net Support



■ Strongly support
 ■ Somewhat support
 ■ Neither support nor oppose
■ Somewhat oppose
 ■ Strongly oppose
 ■ Don't know

A plurality of Albertans oppose the decision to reject Northern Gateway pipeline, a third say 'strongly oppose'



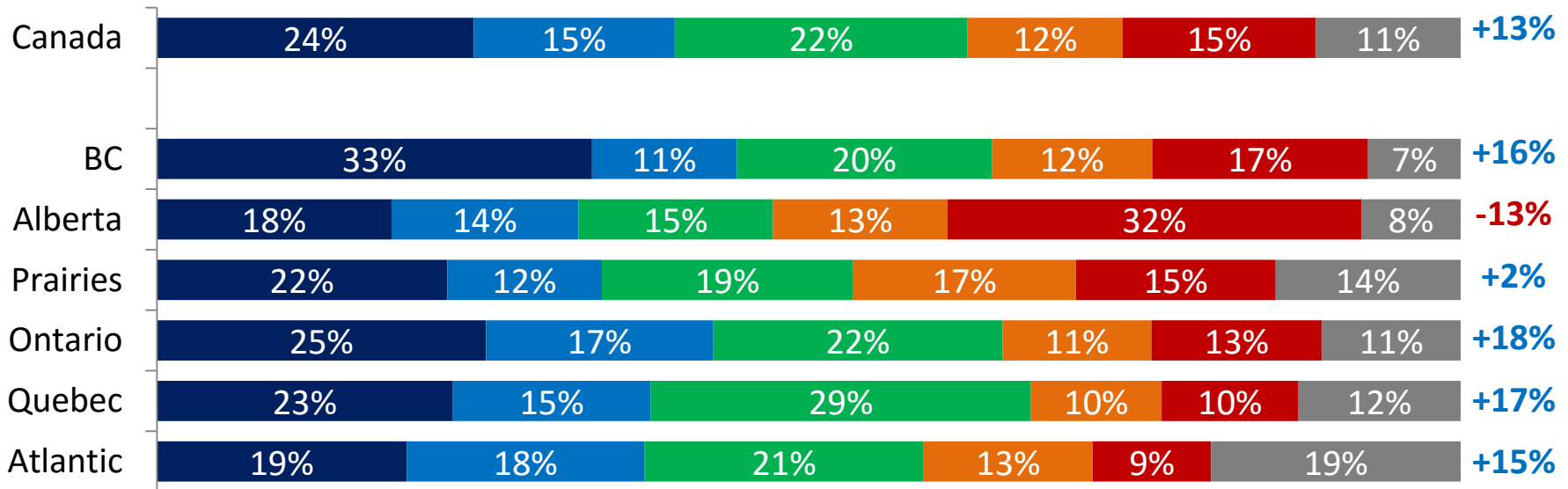
Below is a list of those three decisions. For each decision please indicate if you support or oppose the government's decision?

Not approving the proposed Northern Gateway oil pipeline that would run from Bruderheim, Alberta to Kitimat, BC

BY Region

[all respondents, n=1,200]

Net Support



■ Strongly support

■ Somewhat support

■ Neither support nor oppose

■ Somewhat oppose

■ Strongly oppose

■ Don't know

More Liberals support than oppose the decision to approve Kinder Morgan pipeline expansion



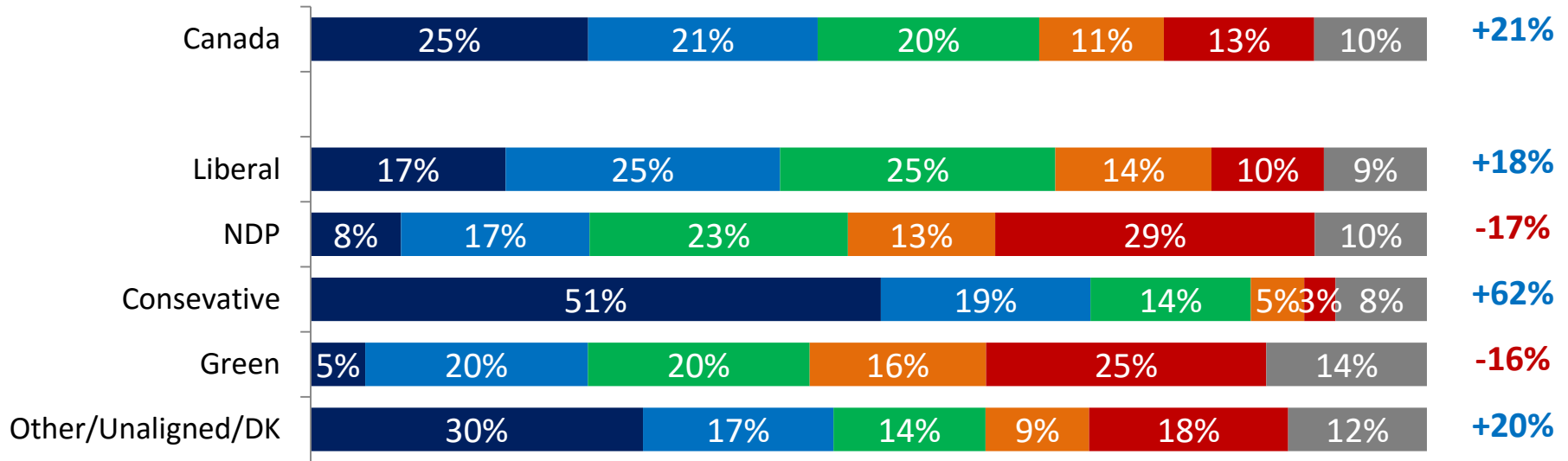
Below is a list of those three decisions. For each decision please indicate if you support or oppose the government's decision?

Approving the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC

BY Federal Party ID

[all respondents, n=1,200]

Net Support



■ Strongly support

■ Somewhat support

■ Neither support nor oppose

■ Somewhat oppose

■ Strongly oppose

■ Don't know

More Liberals support than oppose the decision to approve Line 3 pipeline expansion



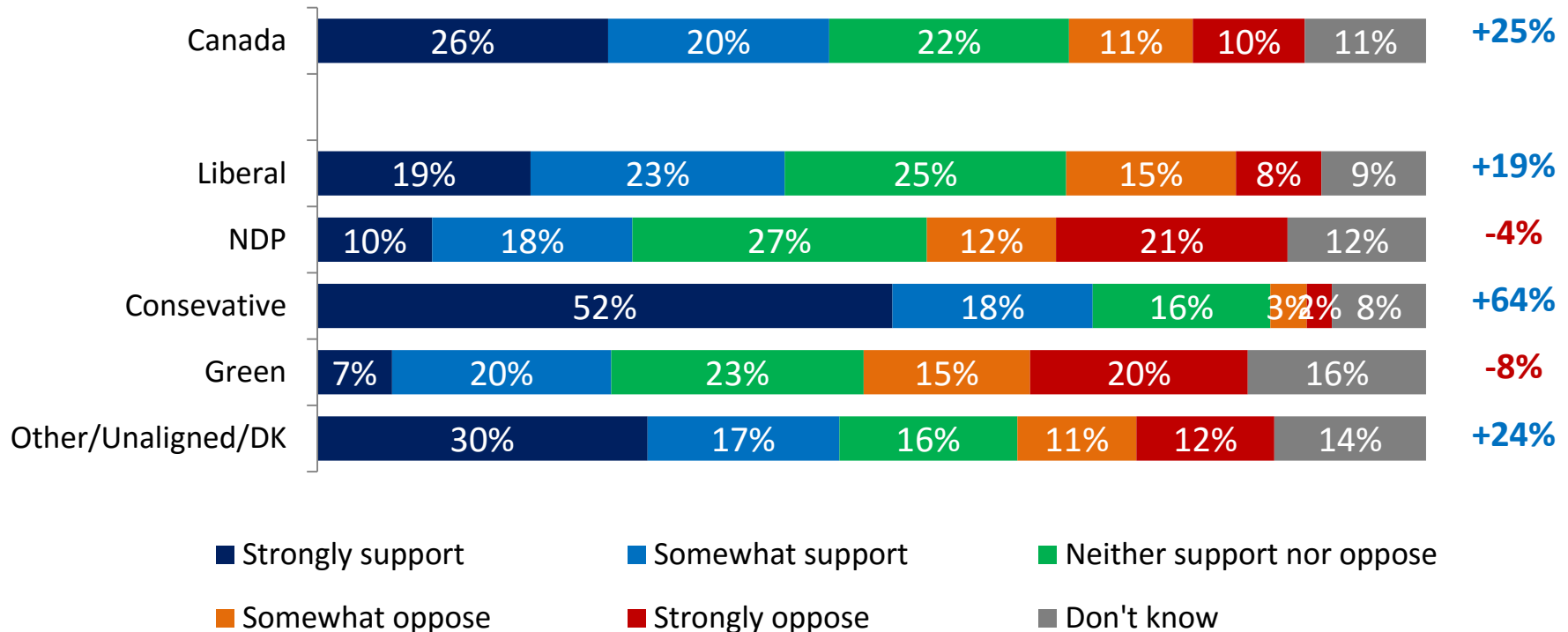
Below is a list of those three decisions. For each decision please indicate if you support or oppose the government's decision?

Approving the Line 3 oil pipeline expansion that runs from Edmonton to Wisconsin

BY Federal Party ID

[all respondents, n=1,200]

Net Support



Almost half of Liberal identifiers support NOT approving the Northern Gateway pipeline



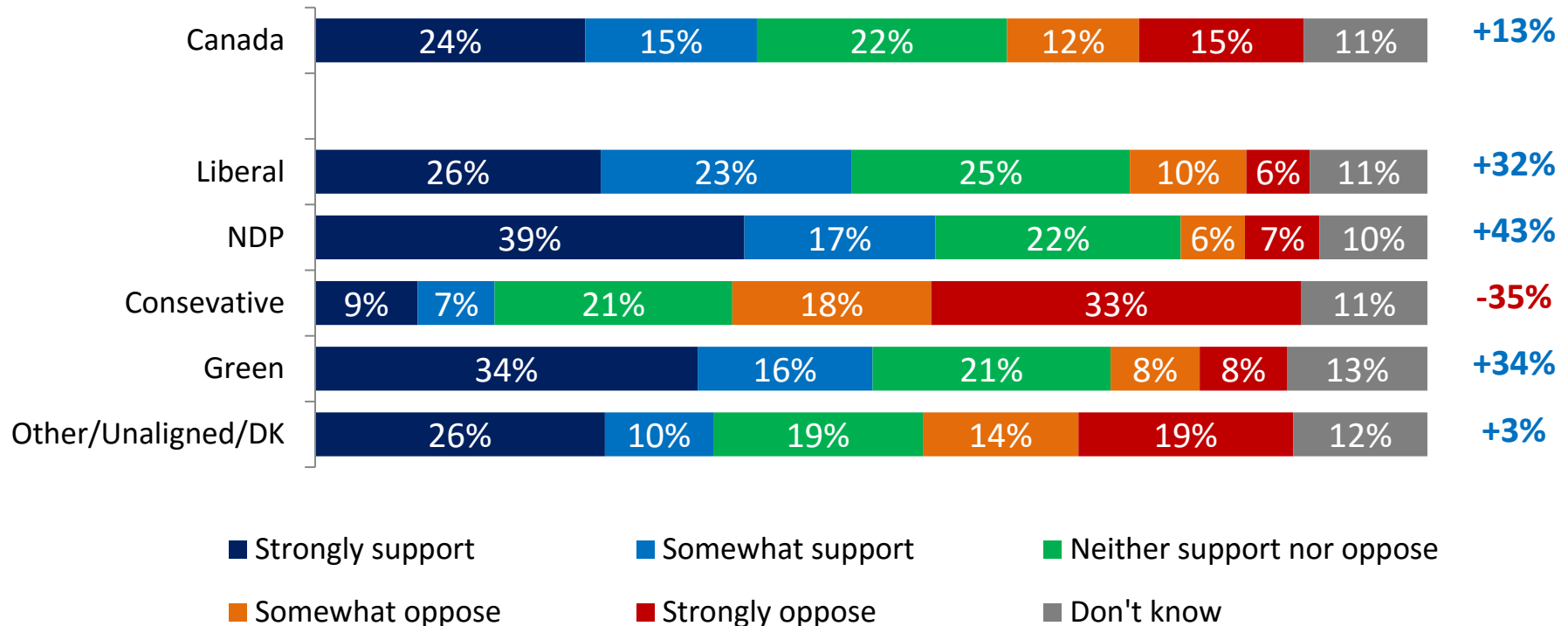
Below is a list of those three decisions. For each decision please indicate if you support or oppose the government's decision?

Not approving the proposed Northern Gateway oil pipeline that would run from Bruderheim, Alberta to Kitimat, BC

BY Federal Party ID

[all respondents, n=1,200]

Net Support

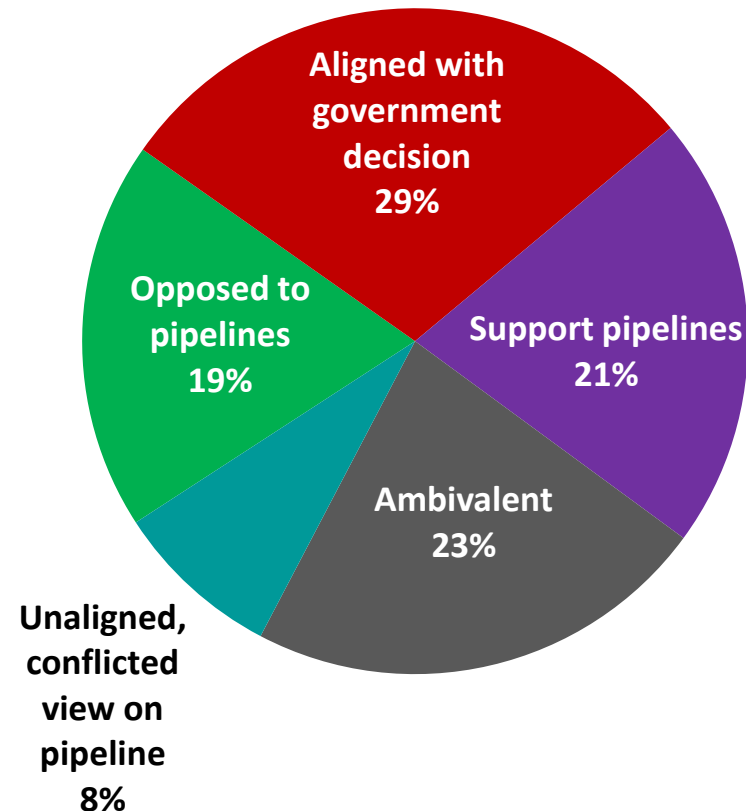


Support for Pipeline Index: three-way split between 'support pipelines', 'ambivalent' and 'opposed to pipelines'

Based on respondents' support to the federal government's decisions, we have grouped respondents into five different groups.

- **'Opposed to pipelines'** includes respondents who are opposed to the approval of the Kinder Morgan and the Line 3 pipeline projects, and support the decision to reject the Northern Gateway pipeline
- **'Aligned with government decision'** includes those who support the approval of the Kinder Morgan and the Line 3 pipeline projects, as well as the decision to reject the Northern Gateway pipeline
- **'Support pipelines'** includes respondents who support the approval of the Kinder Morgan and the Line 3 pipeline projects, and are opposed to the decision to reject the Northern Gateway pipeline
- **'Ambivalent'** includes those who are ambivalent to the three pipeline decisions
- **'Unaligned, conflicted view on pipeline'** includes those who do not align with government decisions and have conflicted views on pipeline projects

The chart on the right outlines the proportion of these five groups among the national sample.



Albertans more likely to support pipelines, those in Quebec and Atlantic likely to be ambivalent



Support for Pipeline Index **BY** Region

Percentage	Region					
	BC	Alberta	Prairies	Ontario	Quebec	Atlantic
Opposed to pipelines	26%	3%	16%	23%	19%	13%
Aligned with government decision	29%	32%	34%	28%	28%	30%
Support pipelines	23%	44%	26%	20%	11%	20%
Ambivalent	12%	16%	17%	22%	32%	32%
Unaligned, conflicted view on pipeline	11%	5%	7%	7%	11%	4%

Three-way split between 'ambivalent', 'aligned with gov't decision', 'opposed to pipelines' among NDPers and Greens



Support for Pipeline Index **BY** Federal Party ID

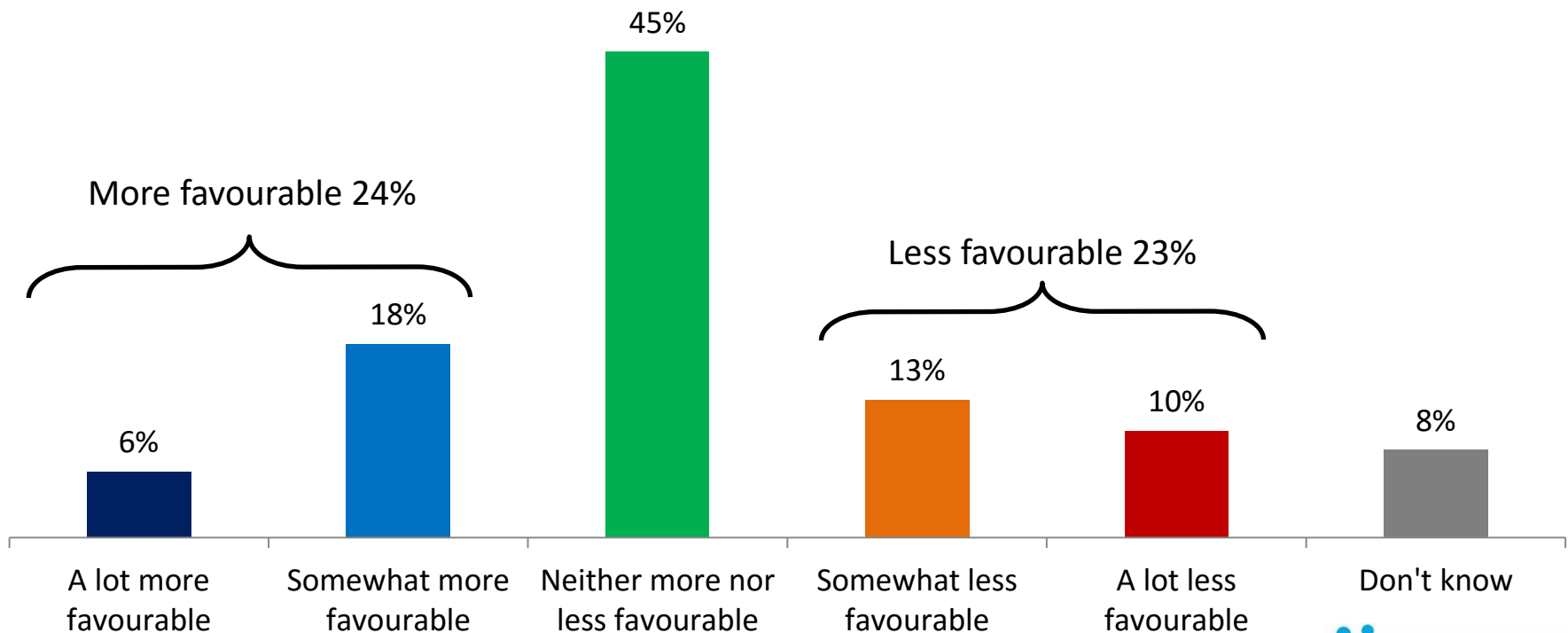
Percentage	Federal Party ID				
	Liberal	NDP	Conservative	Green	Other/ Unaligned/DK
Opposed to pipelines	20%	30%	5%	30%	23%
Aligned with government decision	38%	24%	24%	25%	21%
Support pipelines	10%	6%	48%	5%	30%
Ambivalent	24%	26%	19%	26%	20%
Unaligned, conflicted view on pipeline	8%	14%	4%	14%	6%

Impact on gov't favourability is limited; a quarter feel more favourable, another quarter feel less favourable



From what you know about these three pipeline announcements, do you feel more or less favourable towards the federal government?

[all respondents, n=1,200]



Similar pattern on the impact of decisions on government favourability regardless of attention

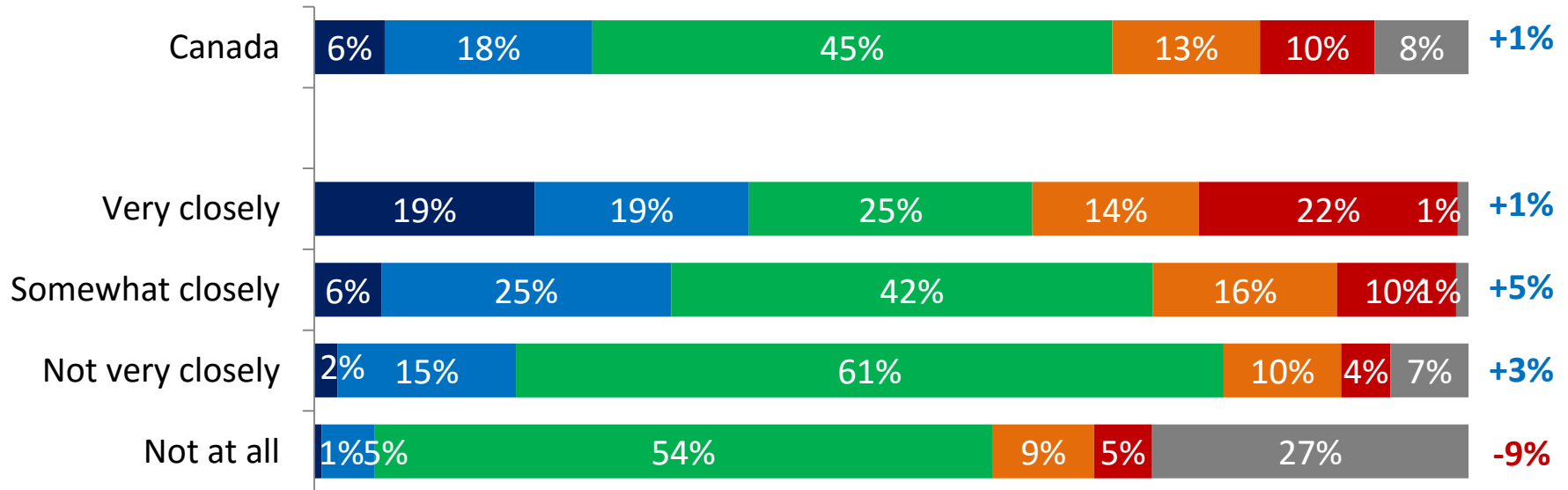


From what you know about these three pipeline announcements, do you feel more or less favourable towards the federal government?

BY How closely they follow the announcements on pipelines

[all respondents, n=1,200]

Net Score



- A lot more favourable
- Somewhat more favourable
- Neither more nor less favourable
- Somewhat less favourable
- A lot less favourable
- Don't know

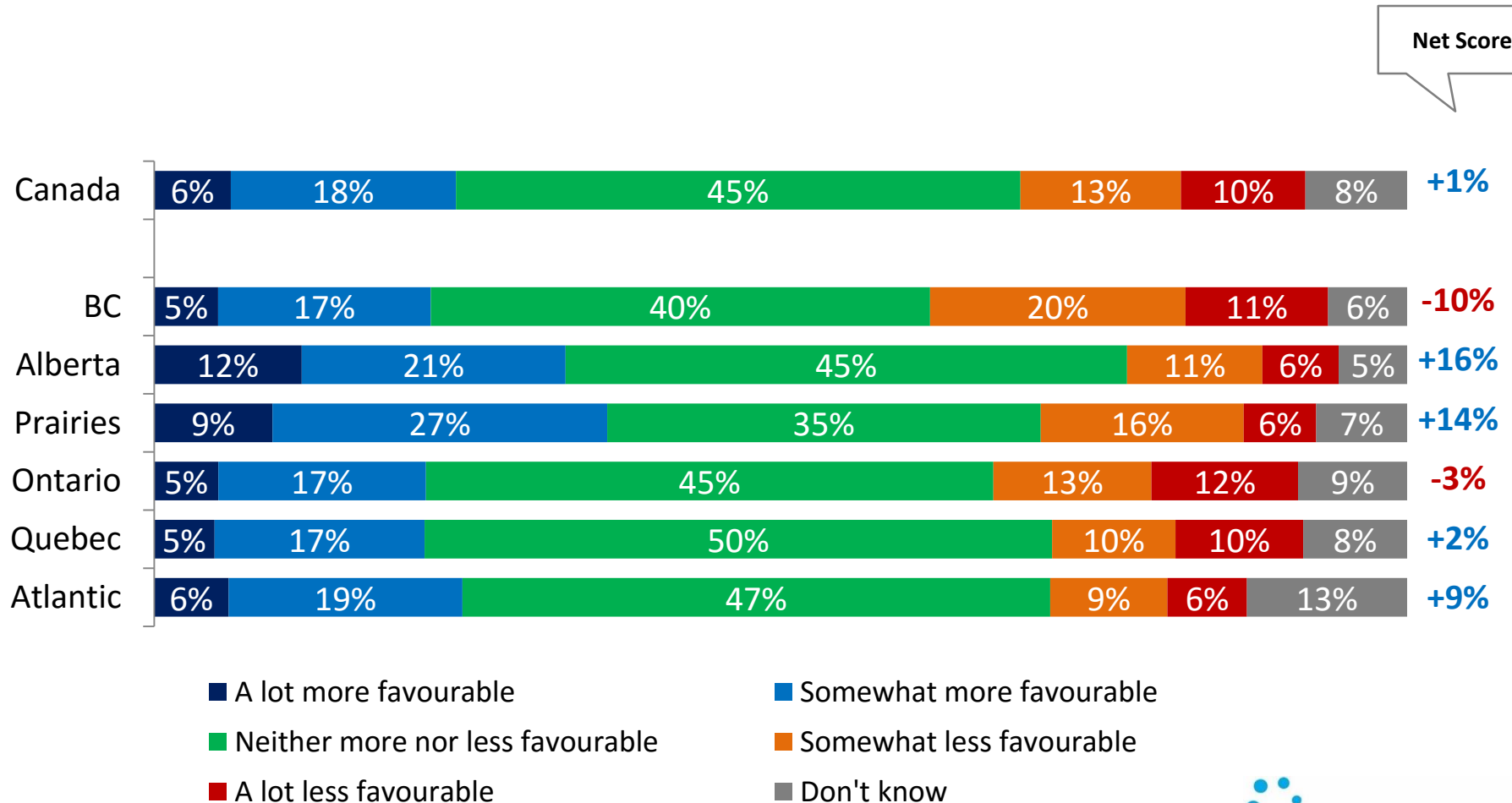
Those in Alberta and Prairies more likely to have a more favourable impression, BC less favourable



From what you know about these three pipeline announcements, do you feel more or less favourable towards the federal government?

BY Region

[all respondents, n=1,200]



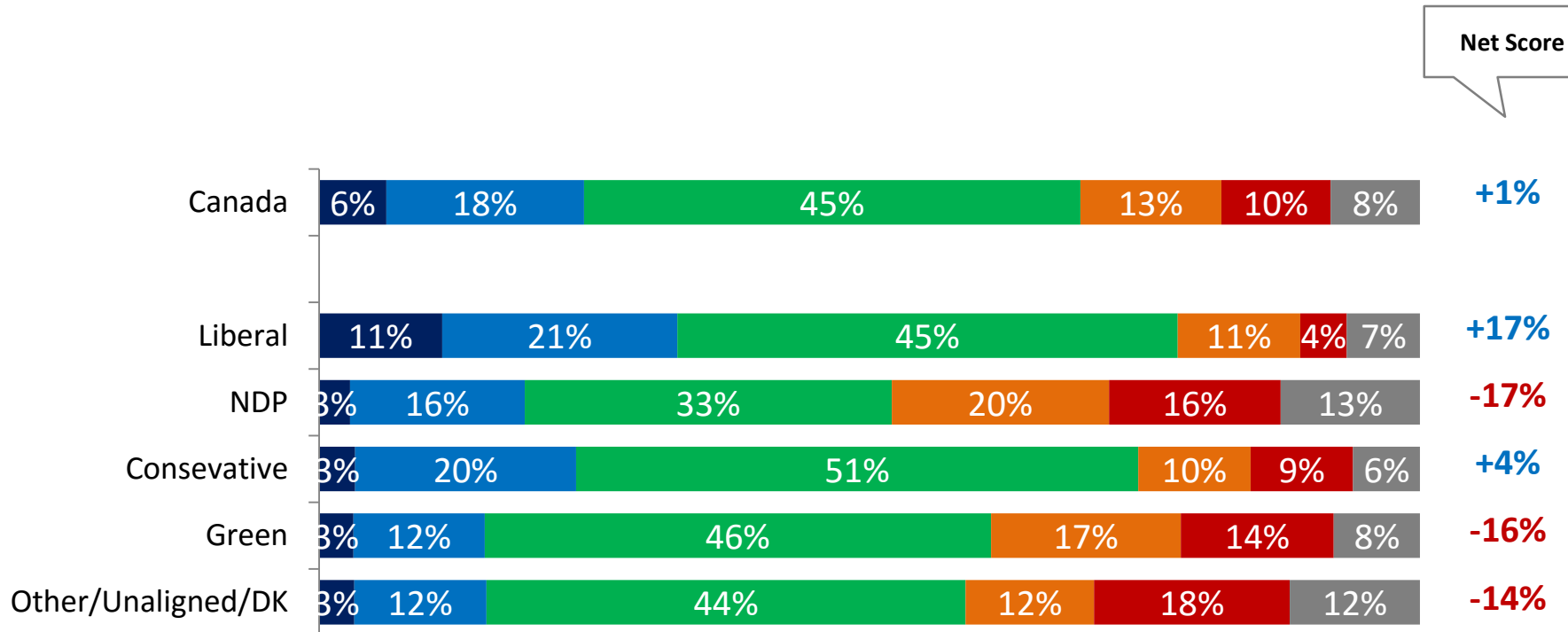
Liberals more likely to feel more favourable towards the government than less favourable



From what you know about these three pipeline announcements, do you feel more or less favourable towards the federal government?

BY Federal Party ID

[all respondents, n=1,200]



■ A lot more favourable

■ Neither more nor less favourable

■ A lot less favourable

■ Somewhat more favourable

■ Somewhat less favourable

■ Don't know

Consistent pipeline supporters more impressed with government, consistent opponents much less favourable

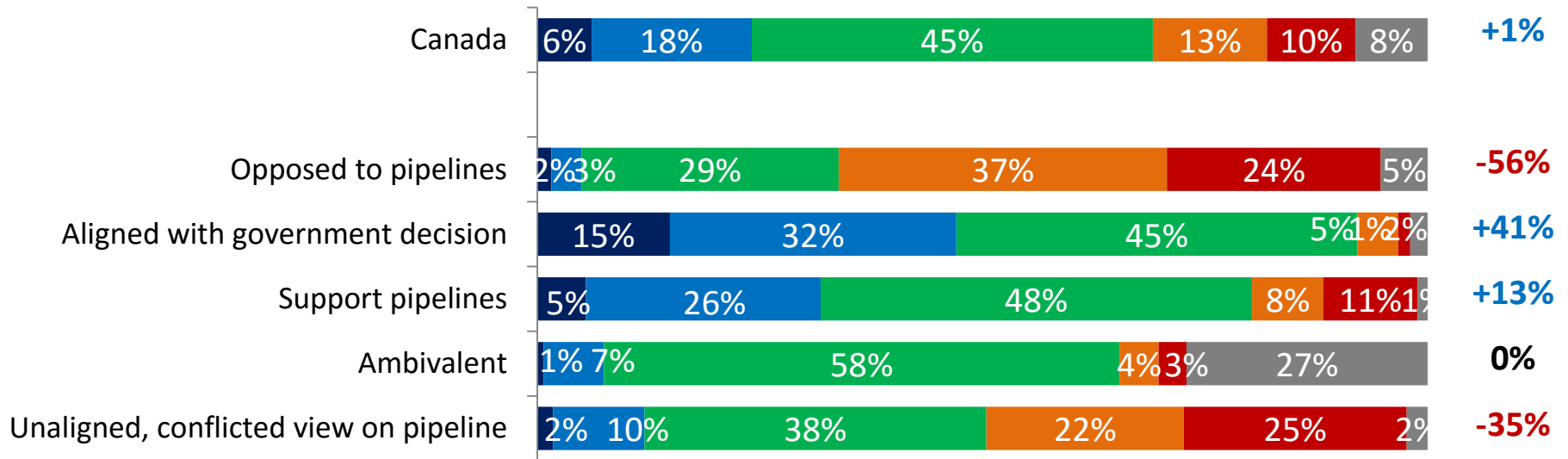


From what you know about these three pipeline announcements, do you feel more or less favourable towards the federal government?

BY Support for Pipeline Index

[all respondents, n=1,200]

Net Score



- A lot more favourable
- Somewhat more favourable
- Neither more nor less favourable
- Somewhat less favourable
- A lot less favourable
- Don't know



Research-based strategic advice.

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