Public Opinion Research

Canada This Month

Trans-Mountain Pipeline

Field Dates: May 7th to May 14th, 2018
Sample Size: n=1,500

May 2018

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Methodology

- These are the findings of an Innovative Research Group (INNOVATIVE) poll conducted from May 7th to May 14th, 2018.
- This online survey of 2,327 Canadian adults was conducted on 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. Each survey is administered to a series of randomly selected samples from the panel and weighted to n=1,500 to ensure that the overall sample's 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.
- 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.*

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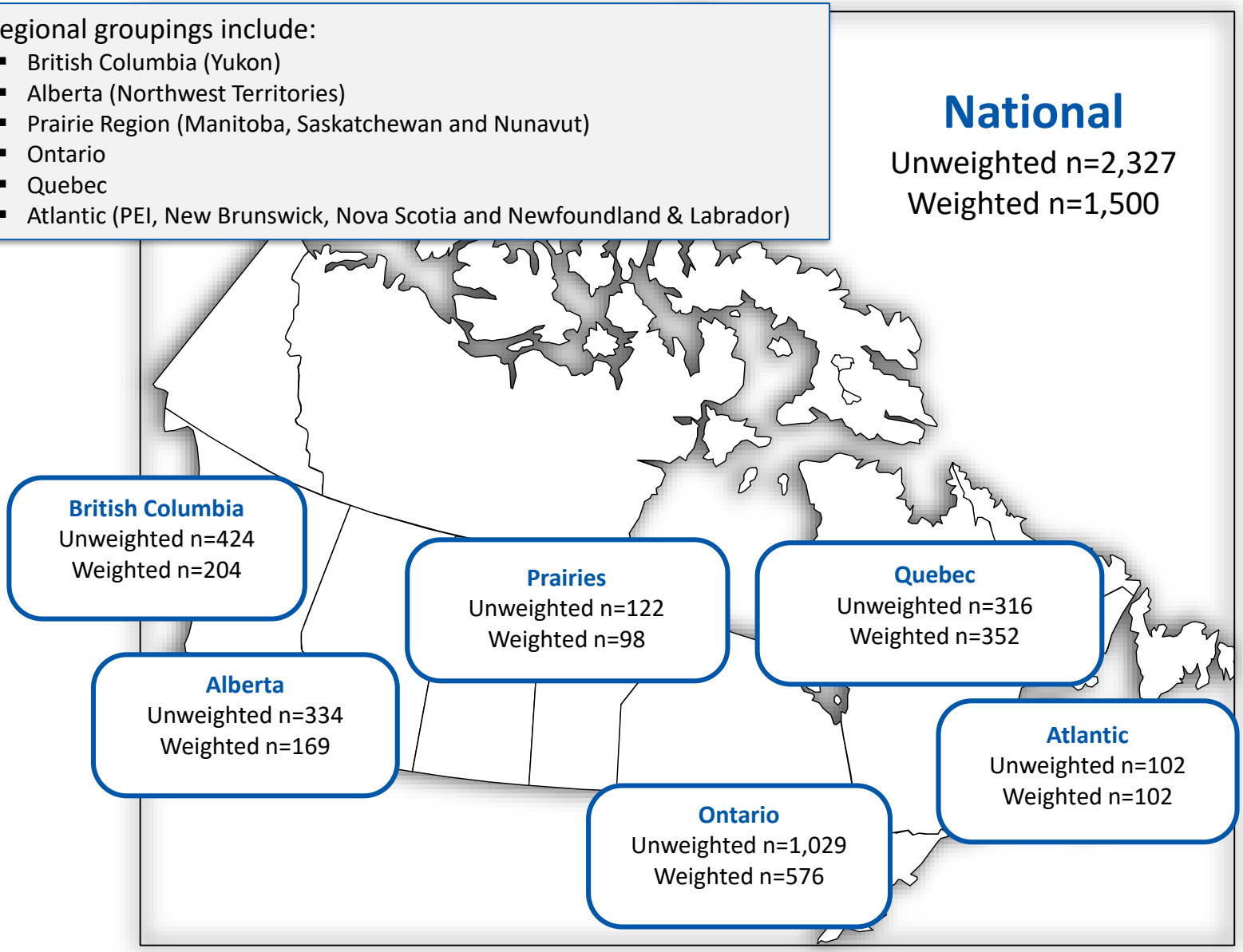
Segmentation: Where did respondents come from?

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)



Federal Party ID

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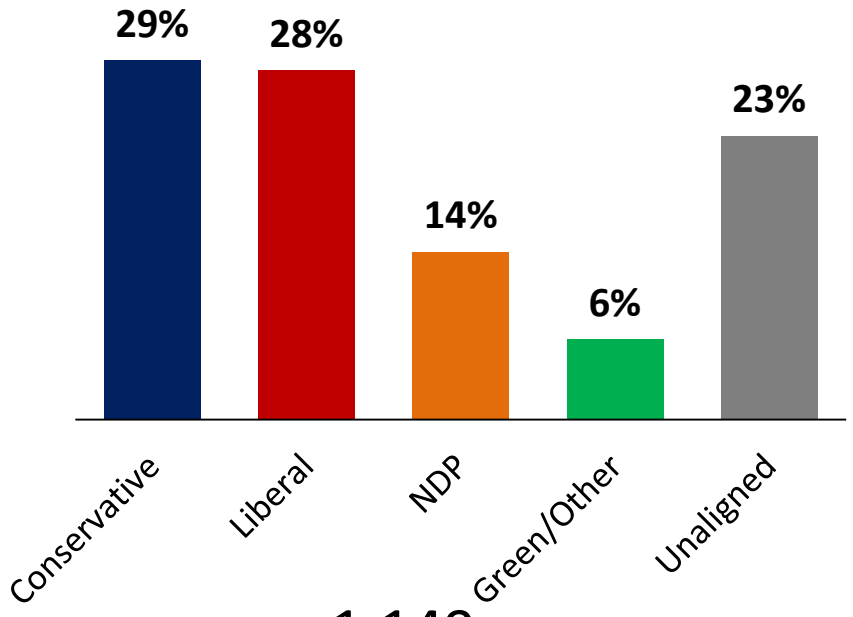
Federal Party ID: 3-in-10 in Rest of Canada identify as Conservative (29%) and Liberal (28%) with 23% unaligned

Q Thinking about politics in Canada, generally speaking, do you think of yourself as a...
[asked of all respondents]

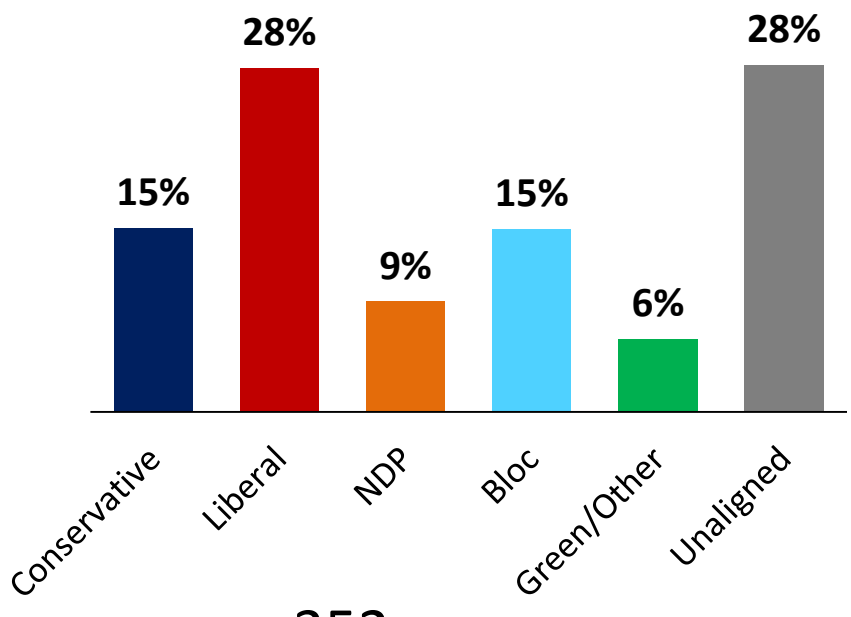
Rest of Canada



n=1,149

Note: n=2,011 unweighted.

Quebec



n=352

Note: n=316 unweighted.

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Support for Various Oil & Gas Projects

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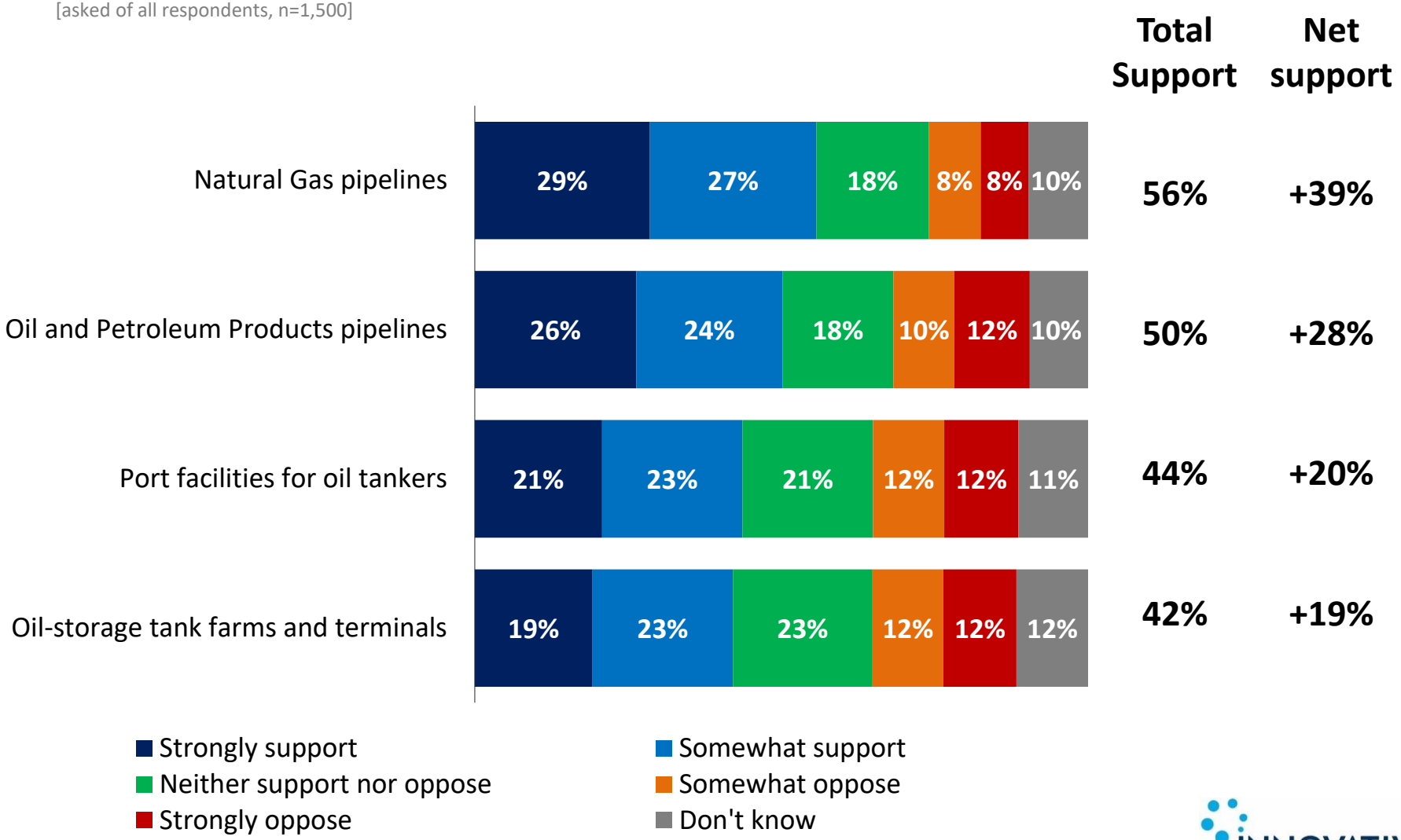
General Support: Support for pipelines higher than for other projects; NG (56%) higher than oil/petroleum products (50%)[7]

Q Generally speaking, would your initial reaction be to support or oppose a proposal to build each of the following projects?

[asked of all respondents, n=1,500]



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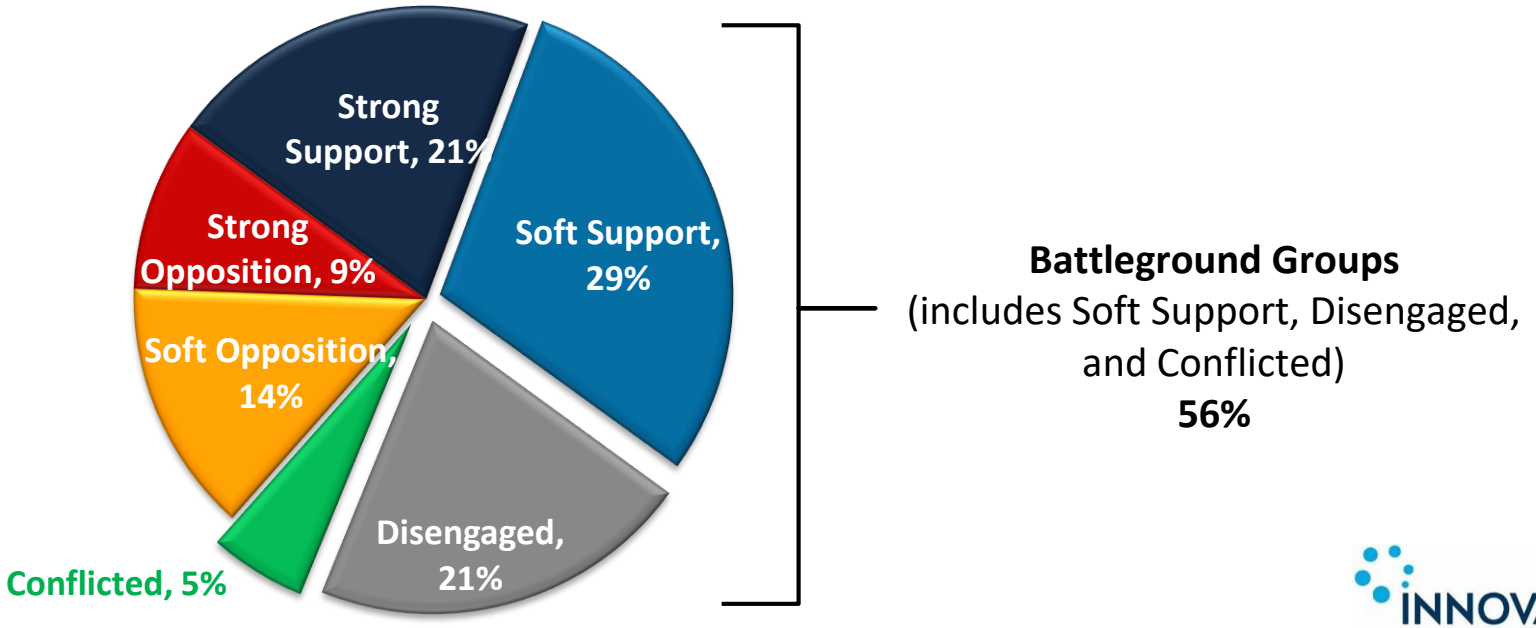
Support Segmentation: Half (56%) are in the Battleground Groups, with 29% in Soft Support and 21% Disengaged

Based on the four questions on general support for oil projects, we group respondents into six groups.

- **Strong Support** includes respondents who say support more often than oppose, and say *strongly support* three or four times.
- **Soft Support** includes those who say support more often than oppose, and say *strongly support to* no more than two out of the four projects asked.
- **Disengaged** includes those who say *don't know* or *neither support nor oppose* at least three times.
- **Conflicted** includes those who are equally likely to say either support or oppose. This group also includes those who say support once more than oppose (or vice versa) and have given a strong opinion only once.
- **Soft Opposition** includes those who say oppose more often than support, and say *strongly oppose to* no more than two out of the four projects asked.
- **Strong Opposition** includes those who say oppose more often than support, and say *strongly oppose* three or four times.



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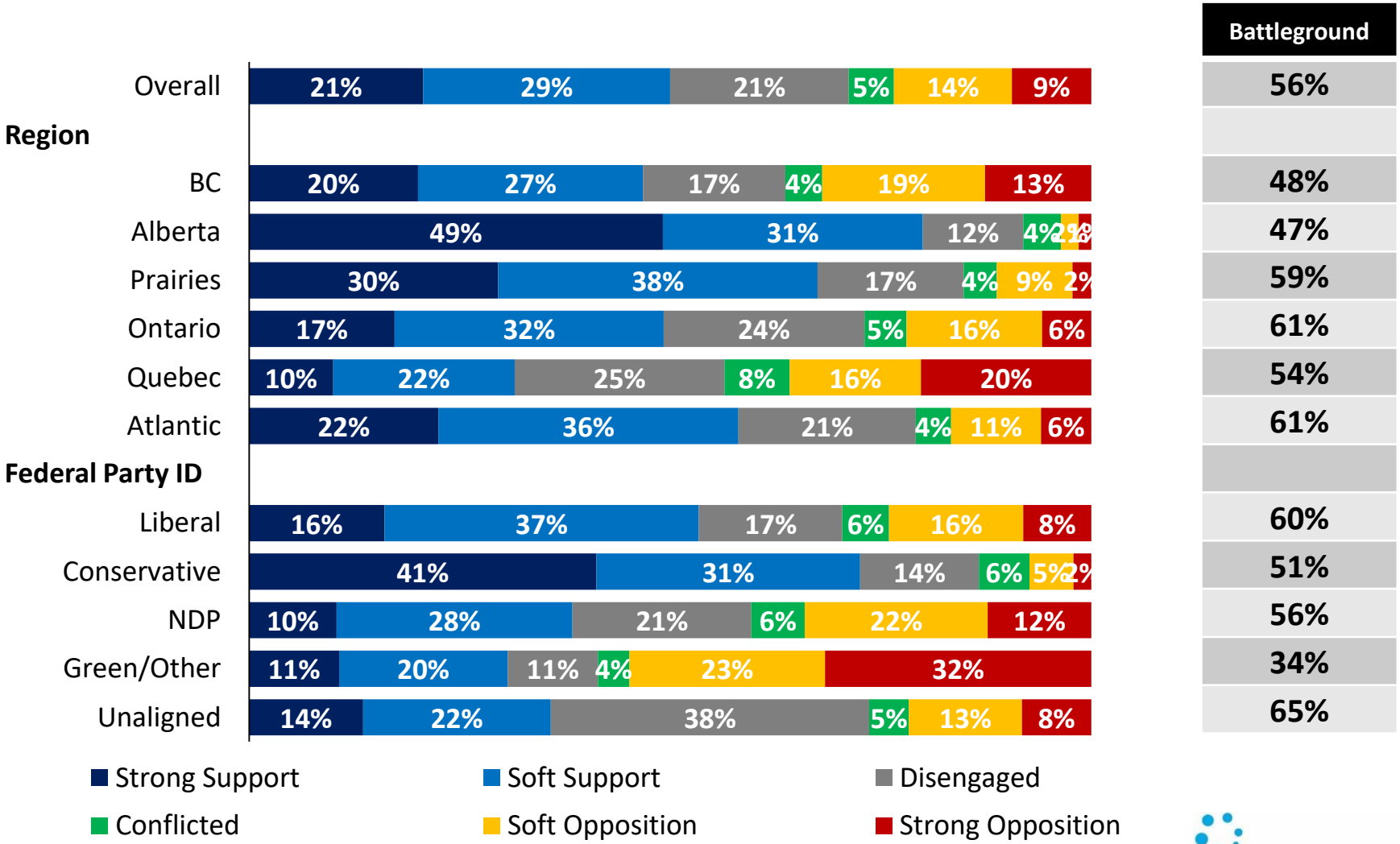
Segmentation Breakdown: Battleground Groups are most prevalent in Ontario and the Atlantic Provinces

Segmentation BY Region and Federal Party ID



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TMX Pipeline Expansion: Awareness & Support

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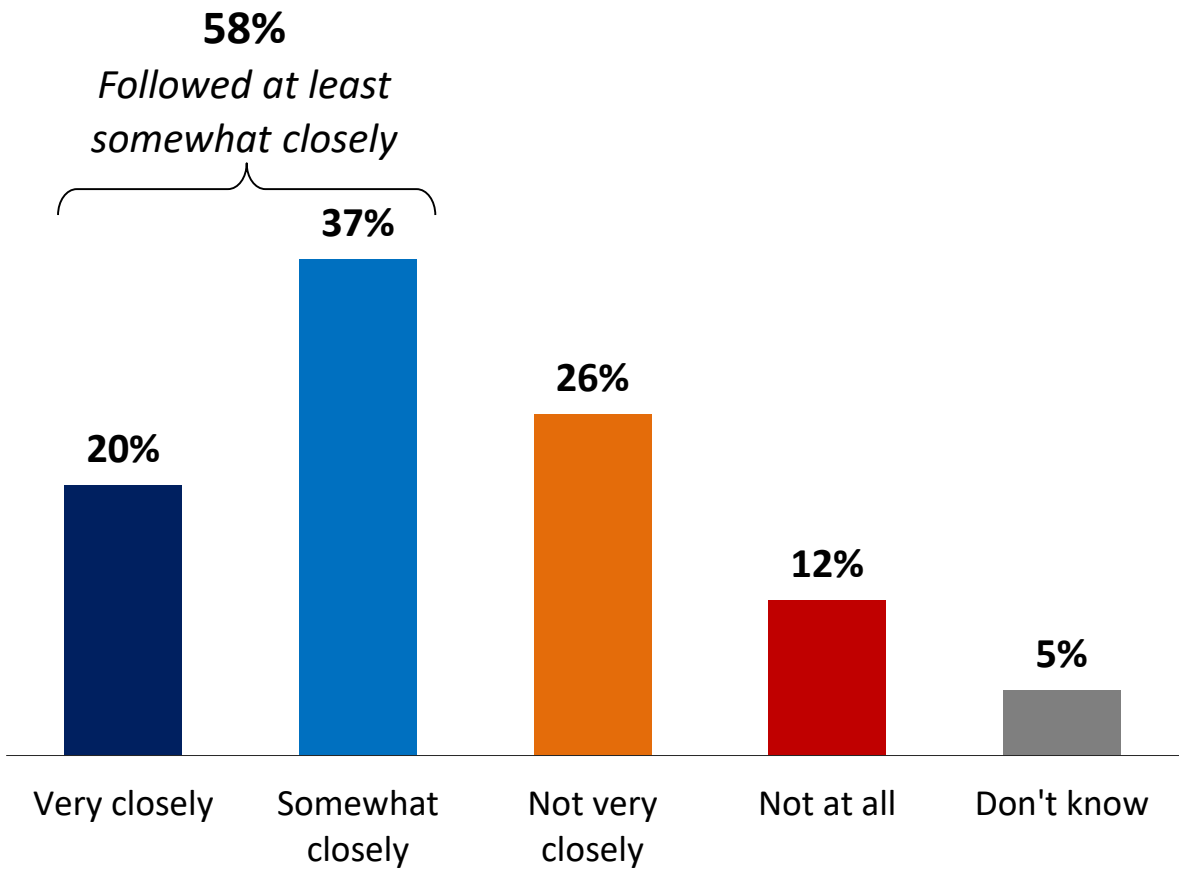
Awareness: 6-in-10 (58%) have followed the news at least somewhat closely; highest among strong supporters (91%)

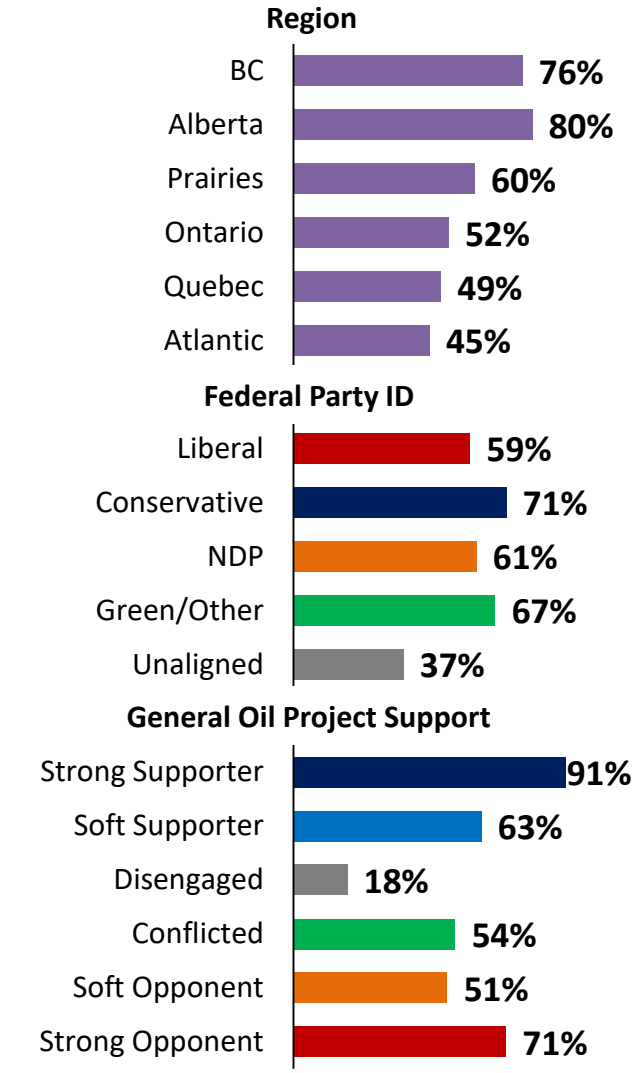
Q In 2016, the federal government announced it approved the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC (the Trans Mountain pipeline). How closely have you been following the news about the federal government's decision on this oil pipeline expansion project in Canada?

[asked of all respondents, n=1,500]



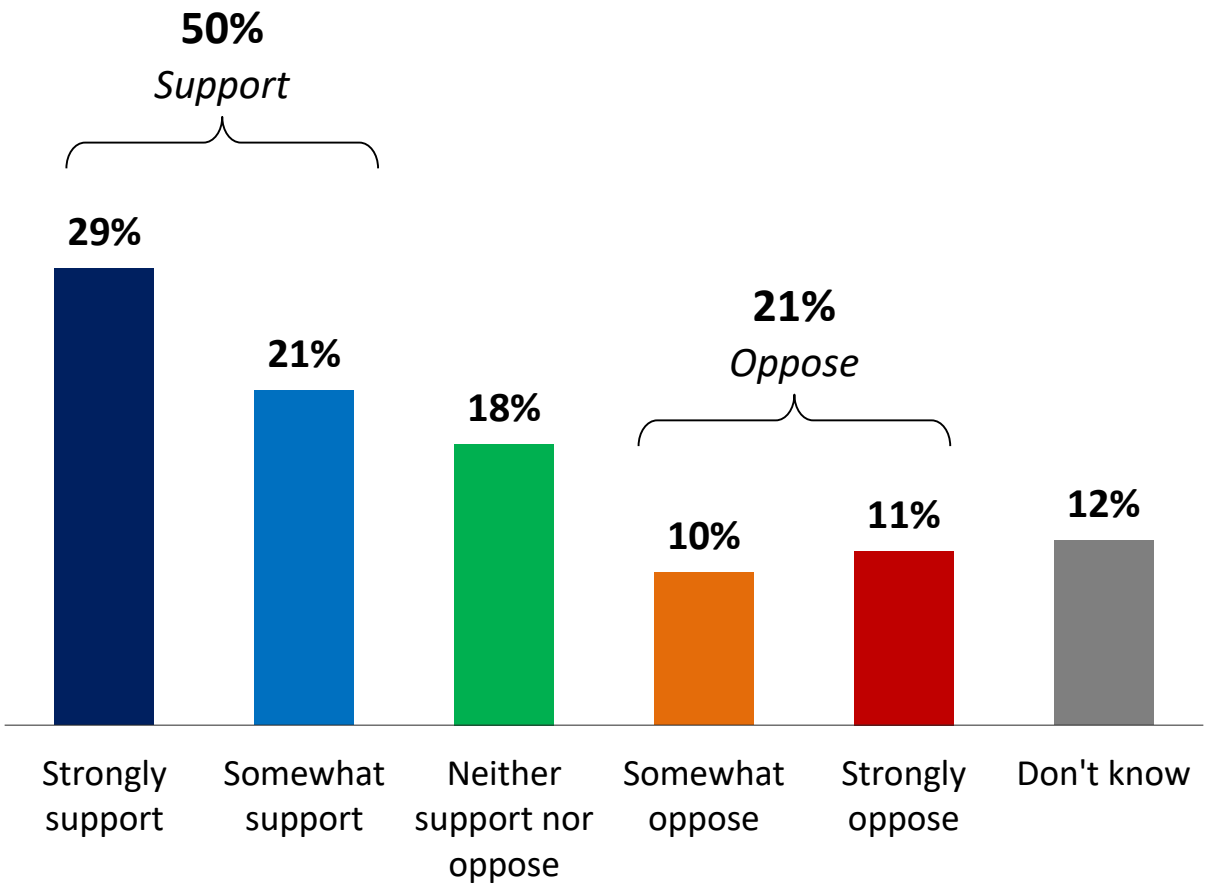
Segmentation

*Those who say they **followed at least somewhat closely***



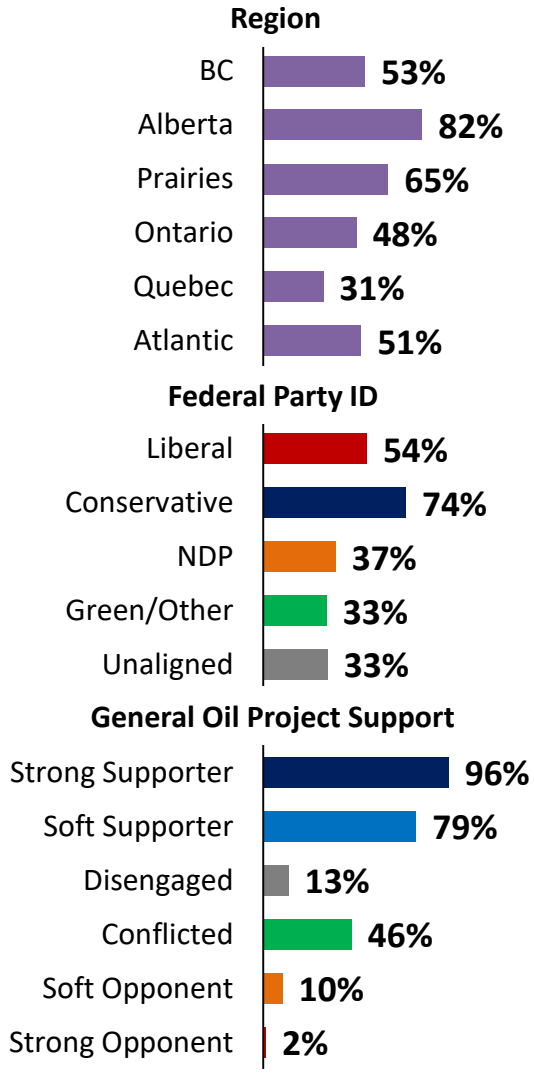
Approval Support: Half (50%) support federal government's expansion approval; highest in Alberta (82%)

Q Thinking about that decision, do you support or oppose the federal government decision to approve the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC (the Trans Mountain pipeline)?
[asked of all respondents, n=1,500]



Segmentation

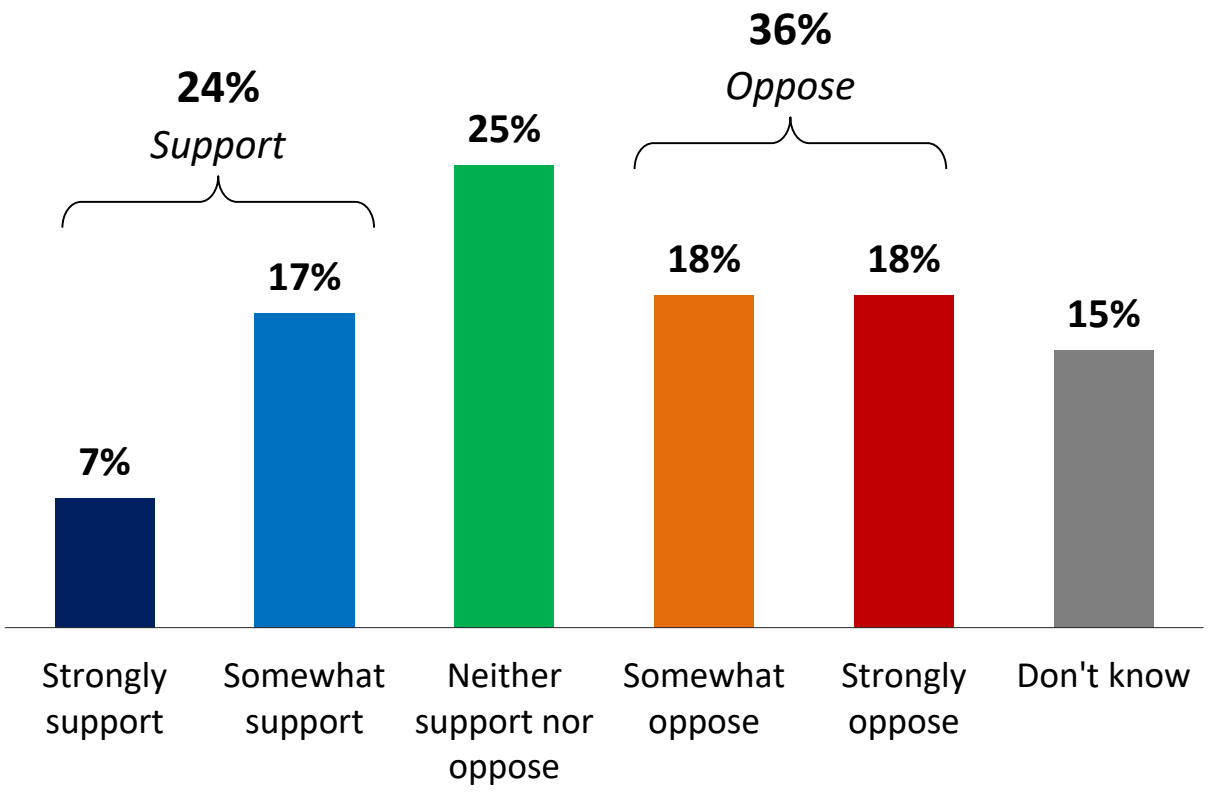
*Those who say **support***



Fed Gov't Management Support: Opposition (36%) higher and more intense than support (24%)

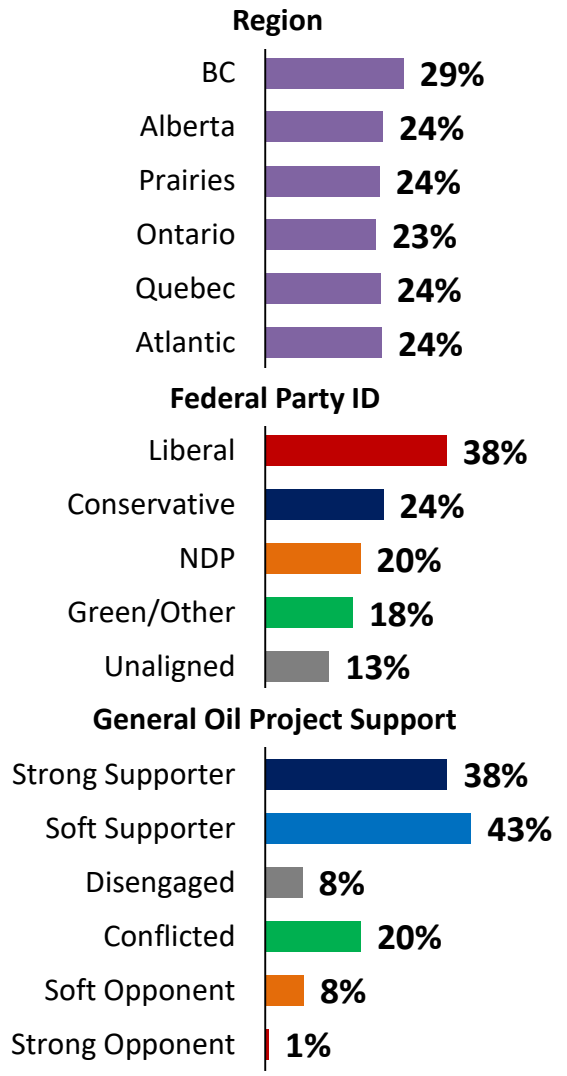
Q Since the government approved the pipeline in 2016, do you support or oppose the way the federal government has managed this issue?

[asked of all respondents, n=1,500]



Segmentation

*Those who say **support***



BC and Alberta Dispute

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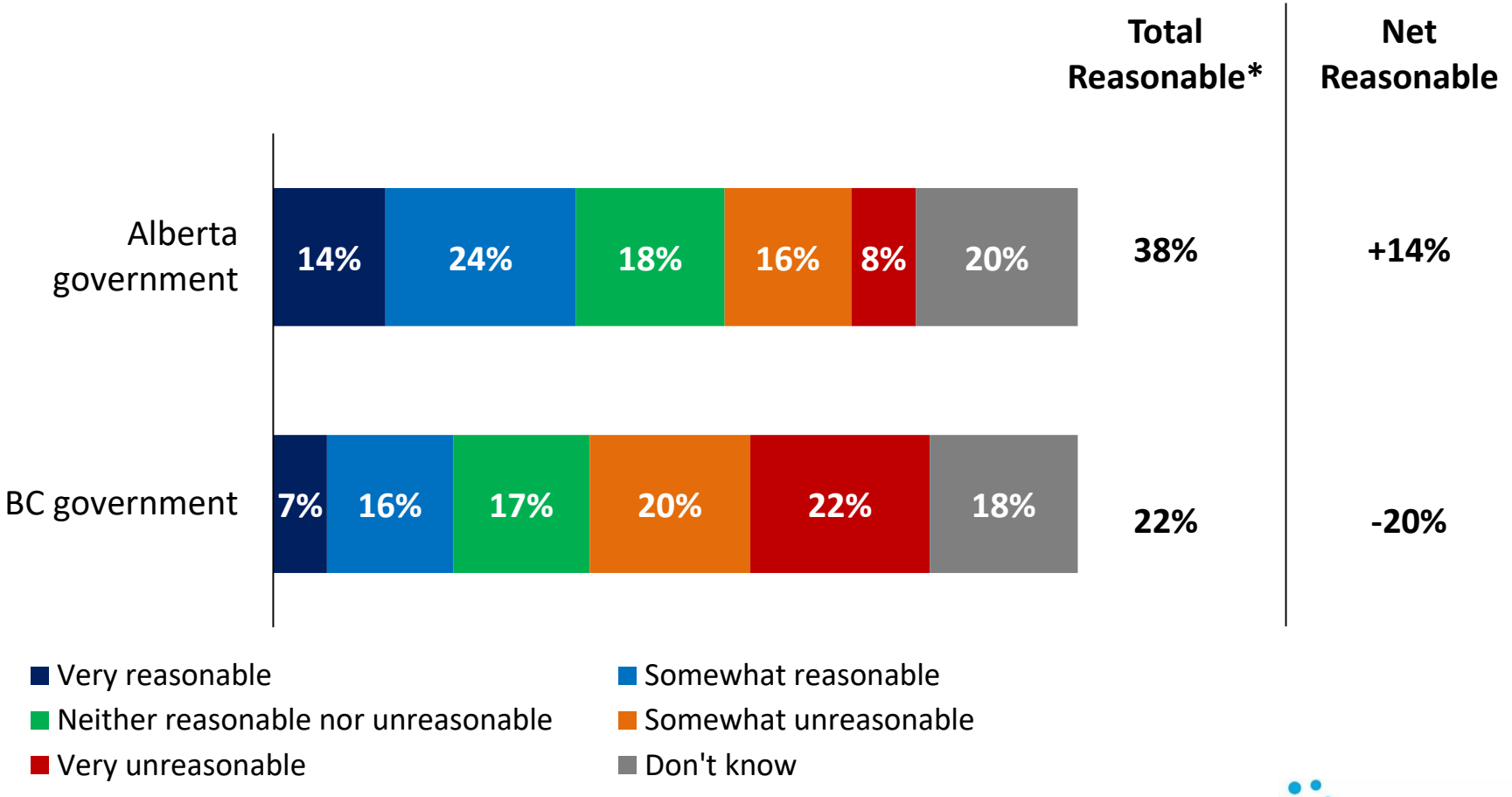
BC/AB Dispute: Less than half view either province as reasonable, but AB seen as more reasonable than BC

Q

Since the federal government approved the Trans Mountain pipeline expansion, there has been a dispute between the BC government and the Alberta government.
Thinking about everything you have heard about the proposed Trans Mountain Pipeline expansion, how fair and reasonable do you think the [BC government/Alberta government] has been?
[asked of all respondents, n=1,500]

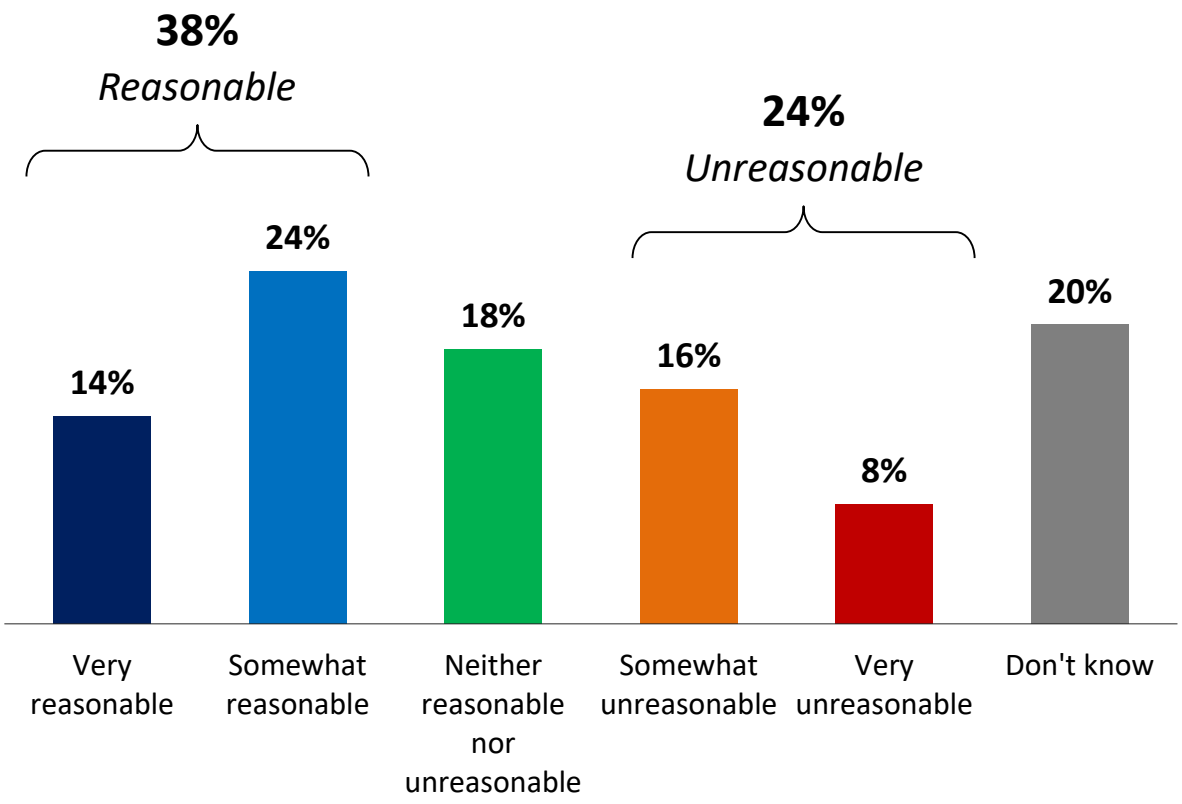


* The difference in the "Total Reasonable" is statistically significant at 95% confidence level.

Alberta Government: Most Albertans (74%) say their gov't has been reasonable, but only 38% across Canada

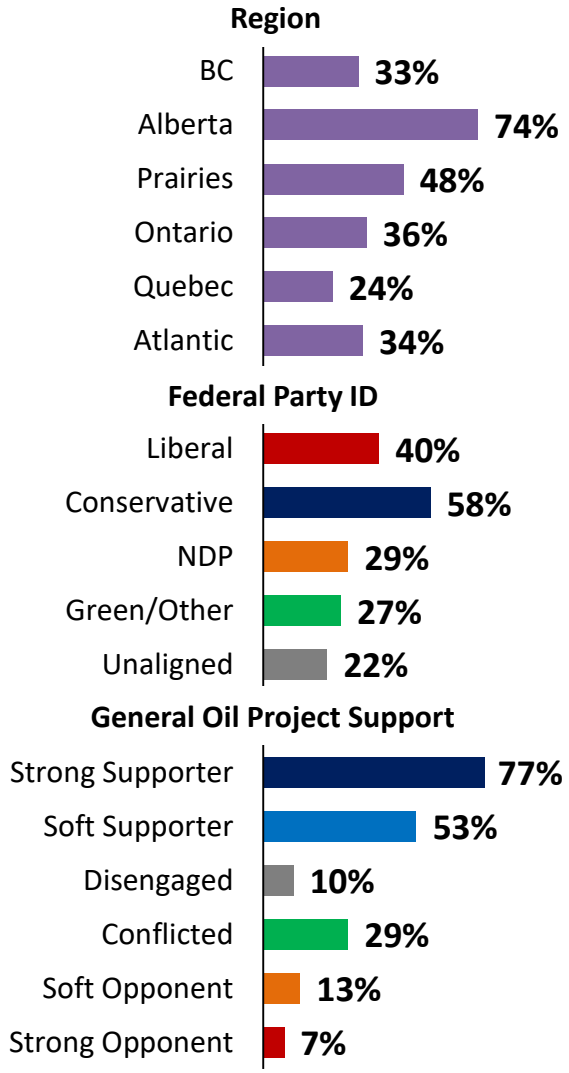
Q Thinking about everything you have heard about the proposed Trans Mountain Pipeline expansion, how fair and reasonable do you think the Alberta government has been?

[asked of all respondents, n=1,500]



Segmentation

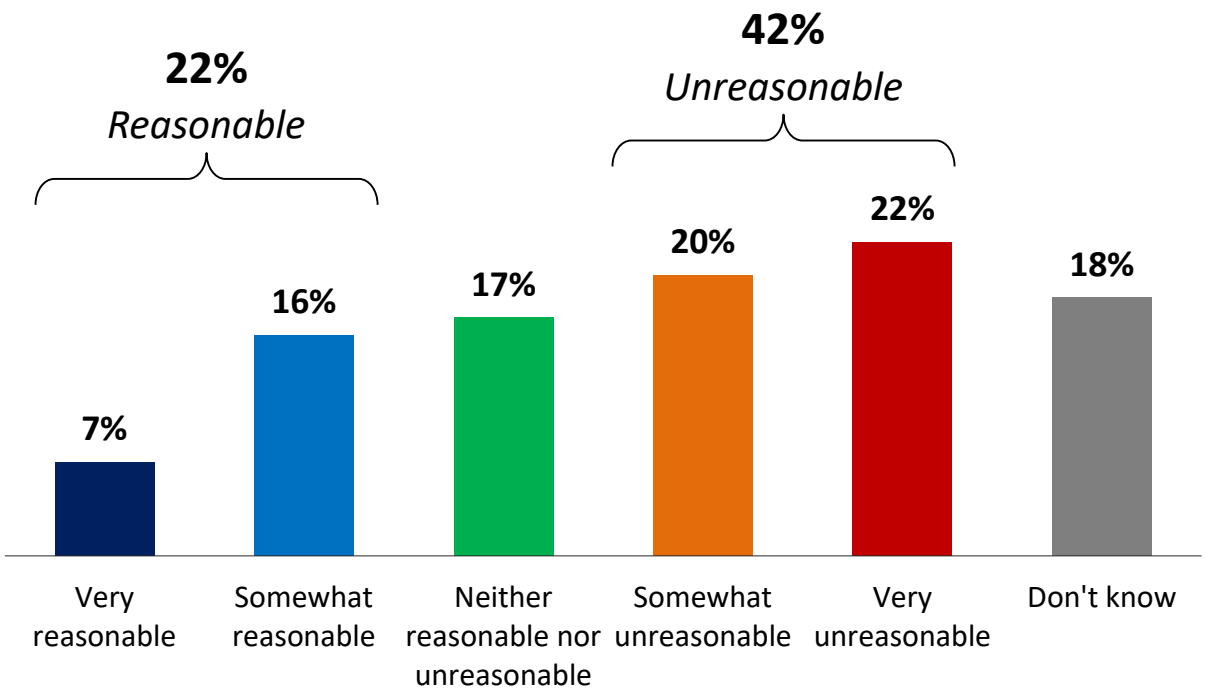
*Those who say **reasonable***



BC Government: Only a third (34%) of residents feel the BC government has been reasonable, much lower outside BC

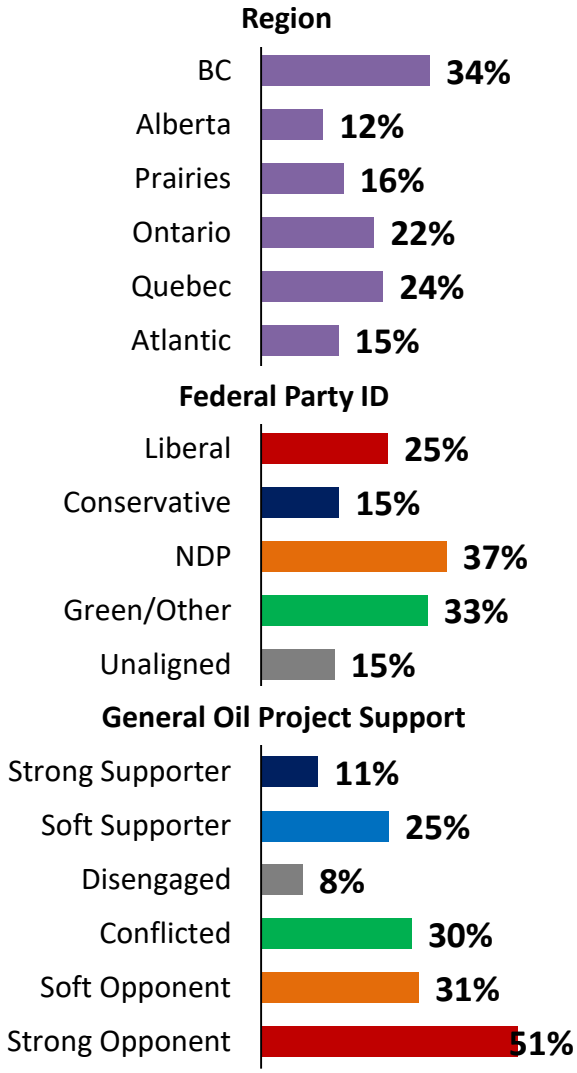
Q Thinking about everything you have heard about the proposed Trans Mountain Pipeline expansion, how fair and reasonable do you think the BC government has been?

[asked of all respondents, n=1,500]



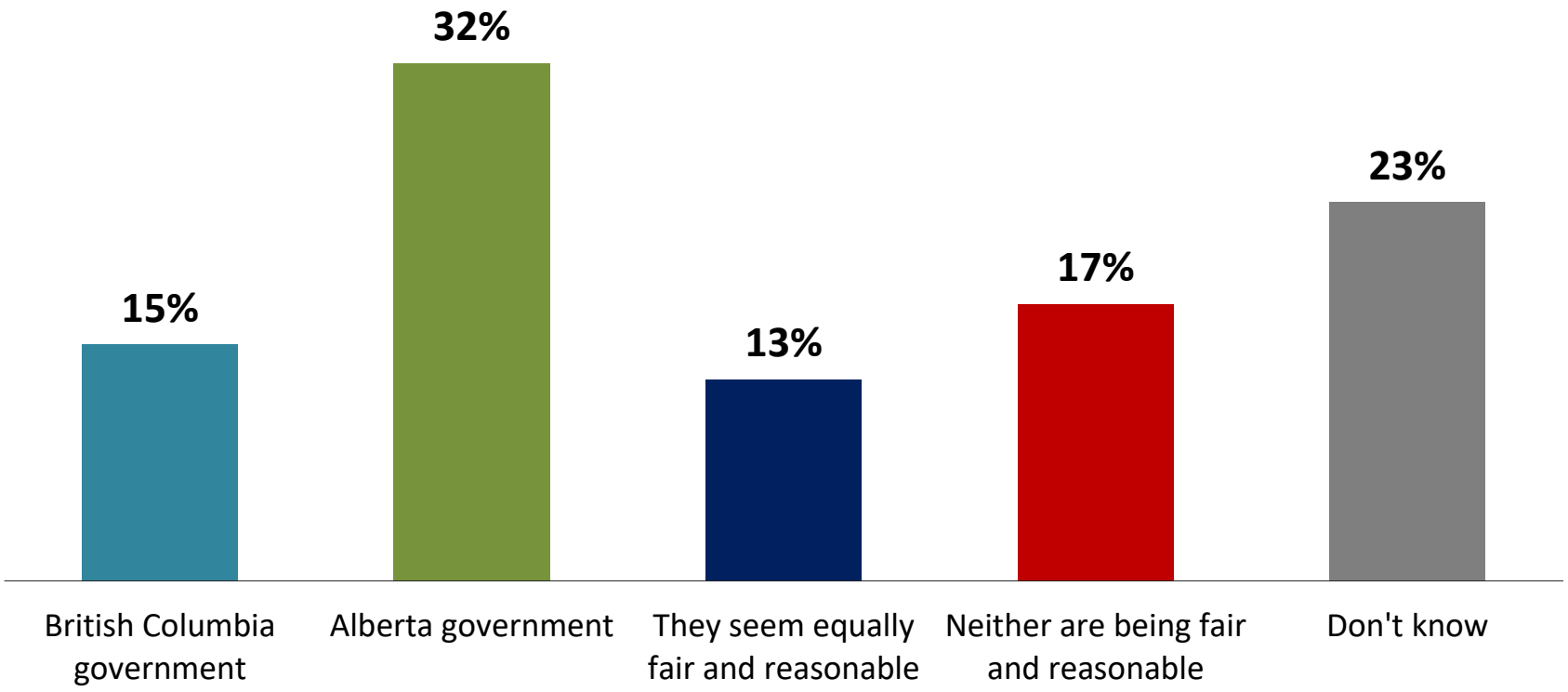
Segmentation

*Those who say **reasonable***



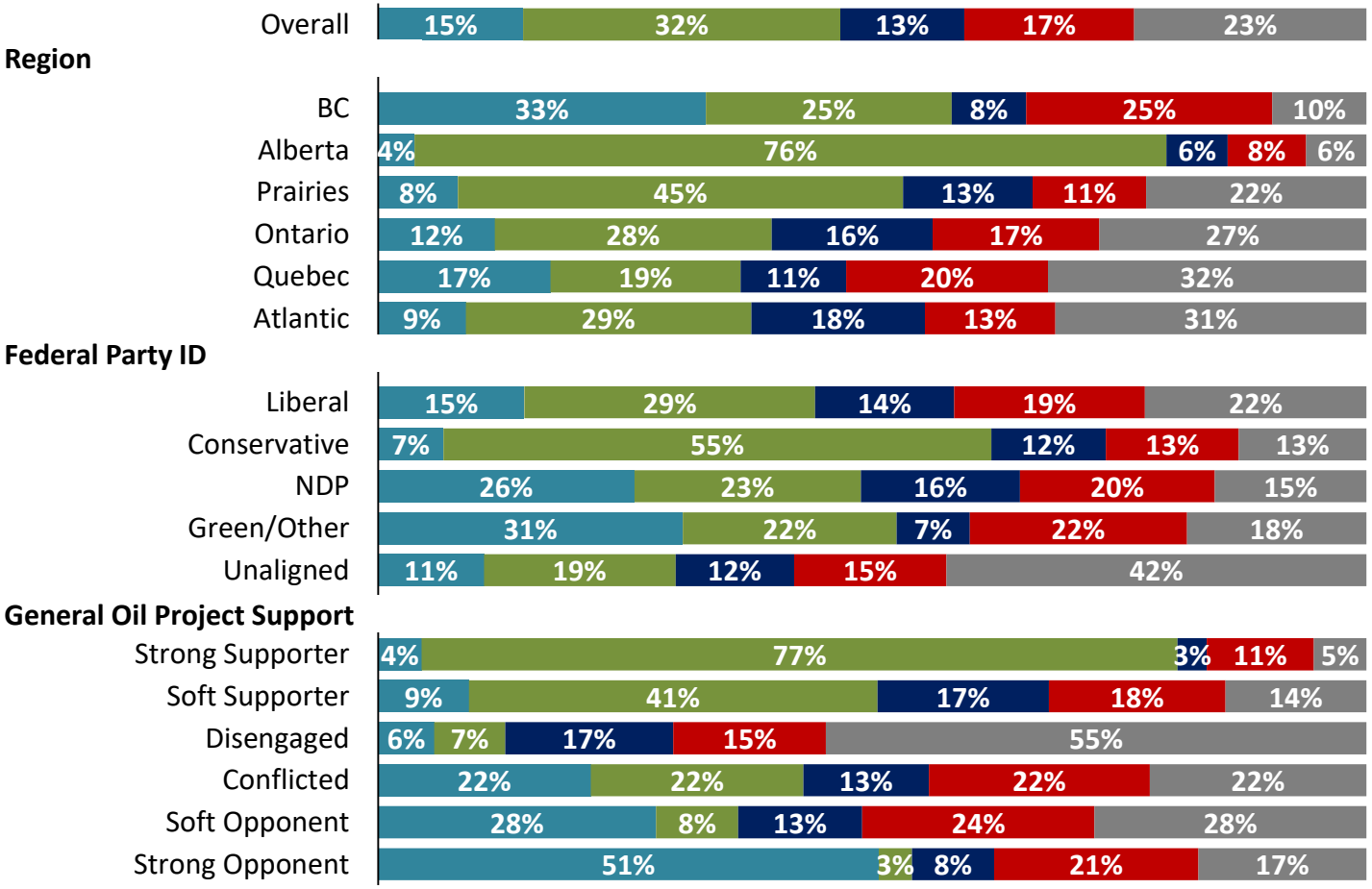
Most Reasonable: Most (53%) don't choose sides, but twice as many choose AB as most reasonable over BC

Q From what you may have seen, read or heard, which province do you feel is being most fair and reasonable?
[asked of all respondents, n=1,500]



Most Reasonable: Provincial loyalty much stronger in Alberta (76% AB most reasonable) than BC (33% BC)

Q From what you may have seen, read or heard, which province do you feel is being most fair and reasonable?
BY Region, Federal Party ID and General Oil Project Support



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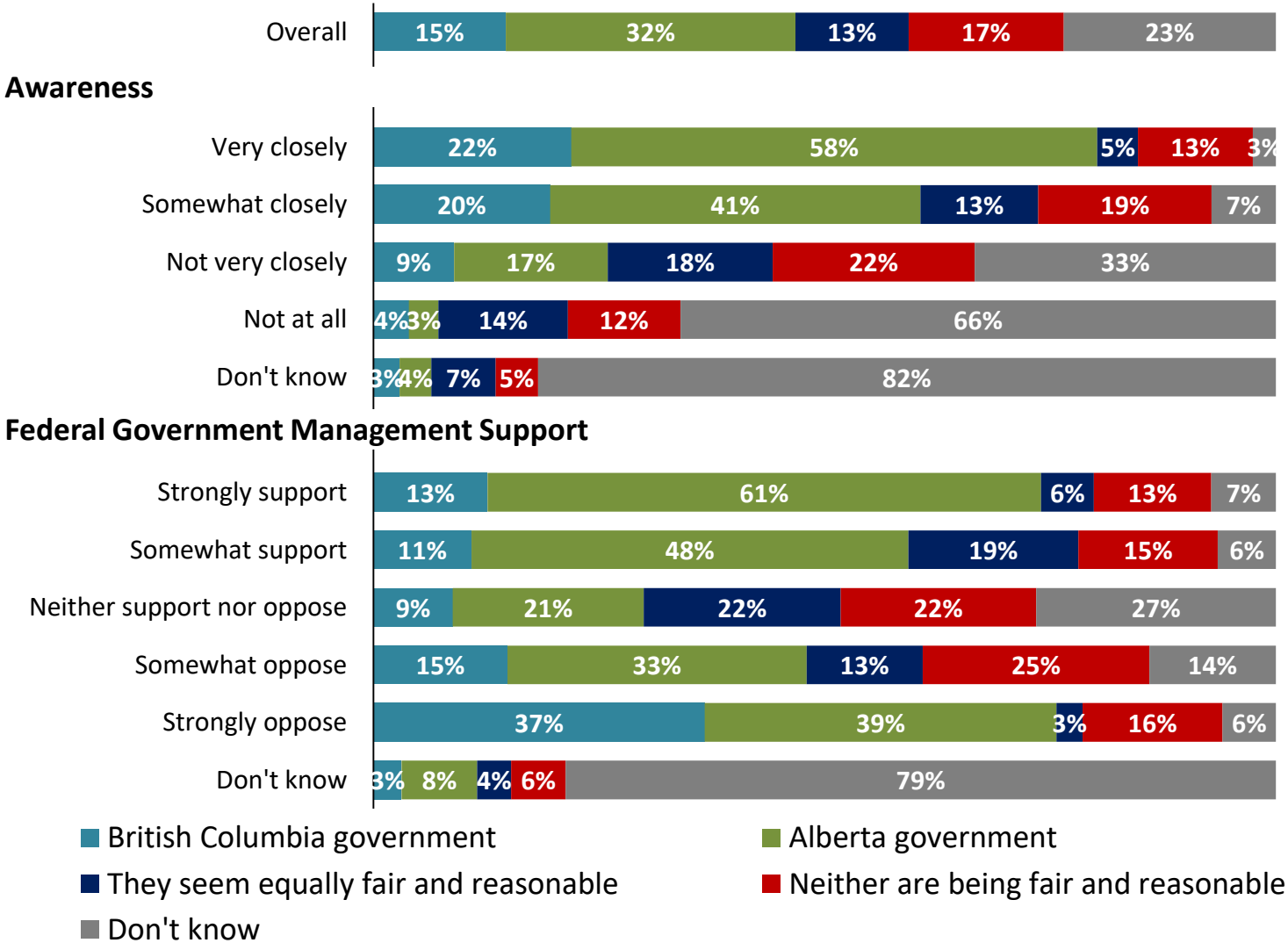
Most Reasonable: Those following most closely are more than 2x as likely to deem AB gov't most reasonable over BC

Q From what you may have seen, read or heard, which province do you feel is being most fair and reasonable?
BY Awareness and Federal Government Management Support



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Federal Government Response and Impact

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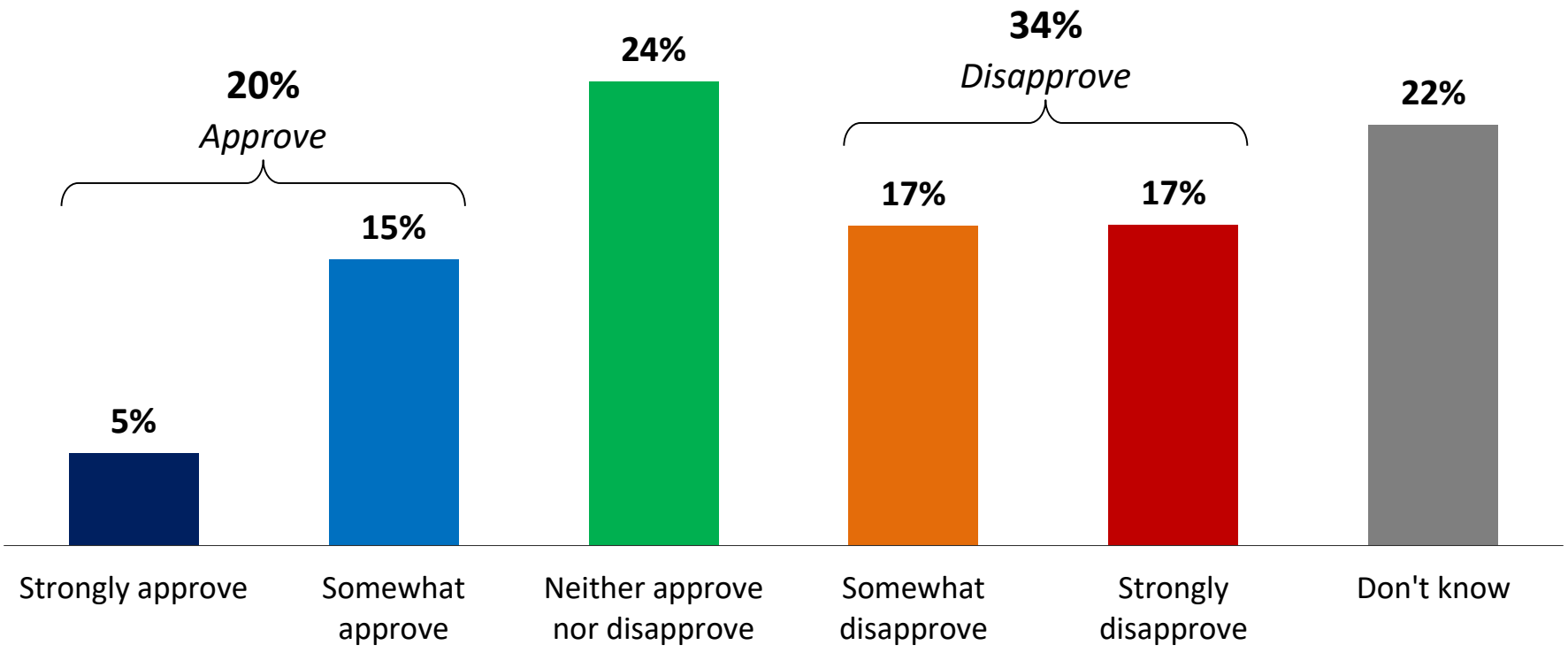
Federal Government Response: Disapproval (34%) higher and much more intense than approval (20%)

Q Do you approve or disapprove of the way the federal government has handled the dispute between Alberta and BC?

[asked of all respondents, n=1,500]



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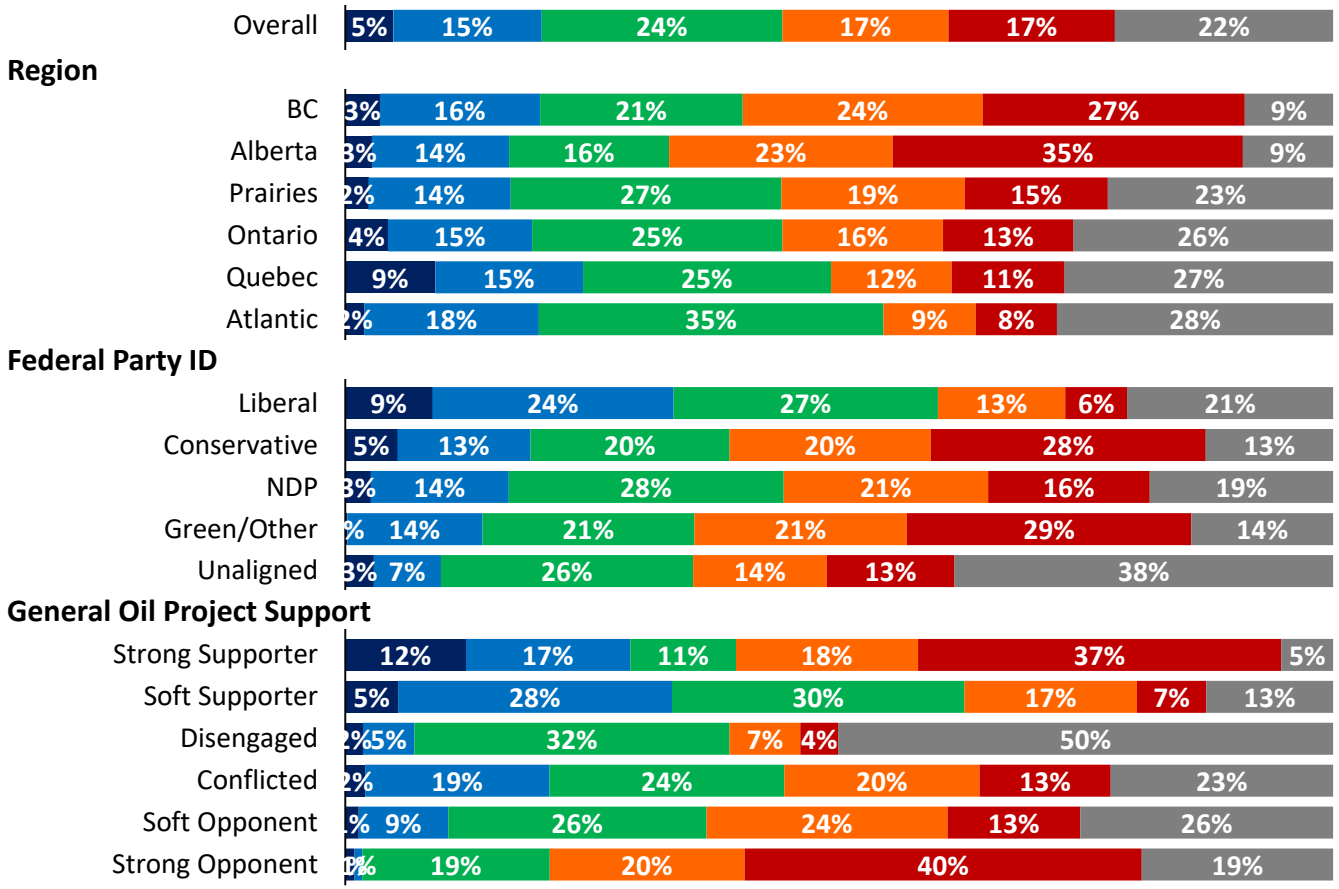
Feds' Response: Approval outweighs disapproval only among Liberal partisans and Soft Supporters

Q Do you approve or disapprove of the way the federal government has handled the dispute between Alberta and BC? BY Region, Federal Party ID and General Oil Project Support



	Total "Approve"	Net "Approve"
Overall	20%	-14%
Region		
BC	20%	-31%
Alberta	17%	-42%
Prairies	17%	-16%
Ontario	19%	-11%
Quebec	24%	0%
Atlantic	20%	2%
Federal Party ID		
Liberal	33%	14%
Conservative	19%	-29%
NDP	17%	-21%
Green/Other	14%	-36%
Unaligned	10%	-17%
General Oil Project Support		
Strong Supporter	29%	-26%
Soft Supporter	33%	9%
Disengaged	7%	-4%
Conflicted	21%	-12%
Soft Opponent	10%	-27%
Strong Opponent	2%	-58%

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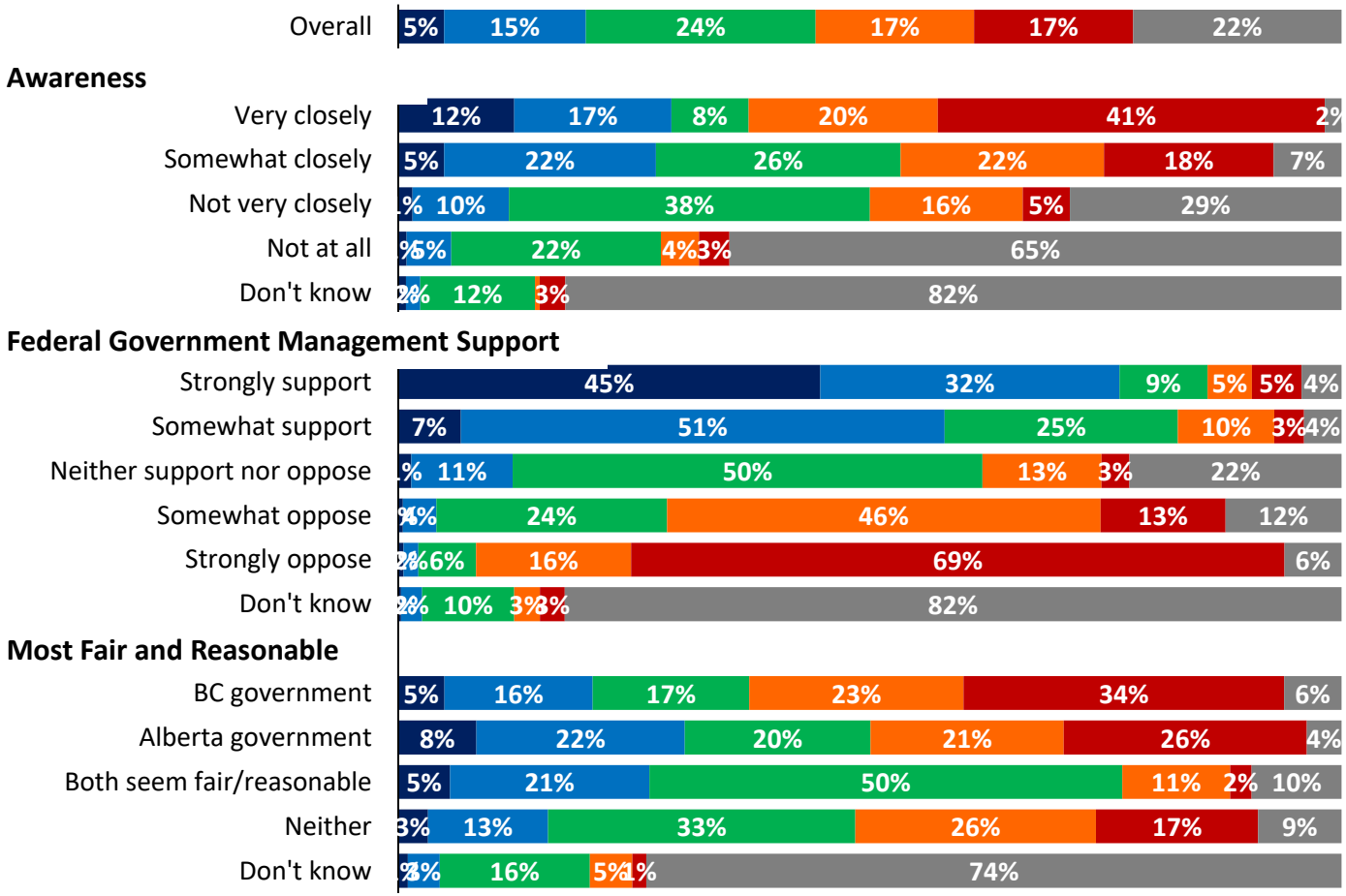
Feds' Response: Disapproval highest among those opposed to fed gov't management and those following most closely

Q Do you approve or disapprove of the way the federal government has handled the dispute between Alberta and BC? BY Awareness and Federal Government Support



	Total "Approve"	Net "Approve"
Overall	20%	-14%
Awareness		
Very closely	29%	-32%
Somewhat closely	27%	-12%
Not very closely	12%	-9%
Not at all	6%	-2%
Don't know	2%	-1%
Federal Government Management Support		
Strongly support	76%	66%
Somewhat support	58%	45%
Neither support nor oppose	12%	-3%
Somewhat oppose	4%	-55%
Strongly oppose	2%	-84%
Don't know	3%	-3%
Most Fair and Reasonable		
BC government	21%	-36%
Alberta government	30%	-16%
Both seem fair/reasonable	27%	13%
Neither	16%	-27%
Don't know	4%	-2%

Strongly approve
Somewhat approve
Neither approve nor disapprove
Somewhat disapprove
Strongly disapprove
Don't know

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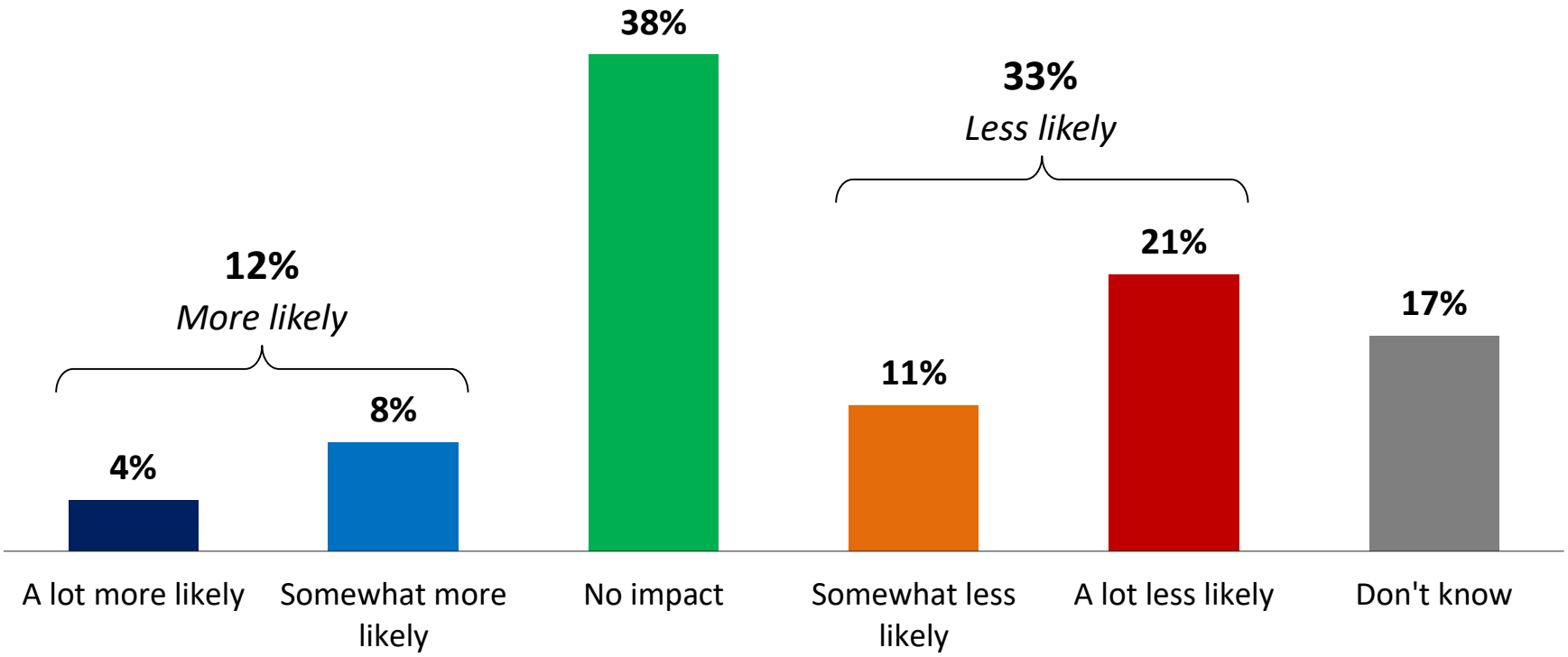
Impact on Vote: No impact or uncertainty for most, but negative impact higher and more intense than positive

Q Thinking overall about the Kinder Morgan pipeline issue, has the federal government's handling of the issue left you feeling more or less likely to vote for the Liberal party in the 2019 Federal Election?

[asked of all respondents, n=1,500]



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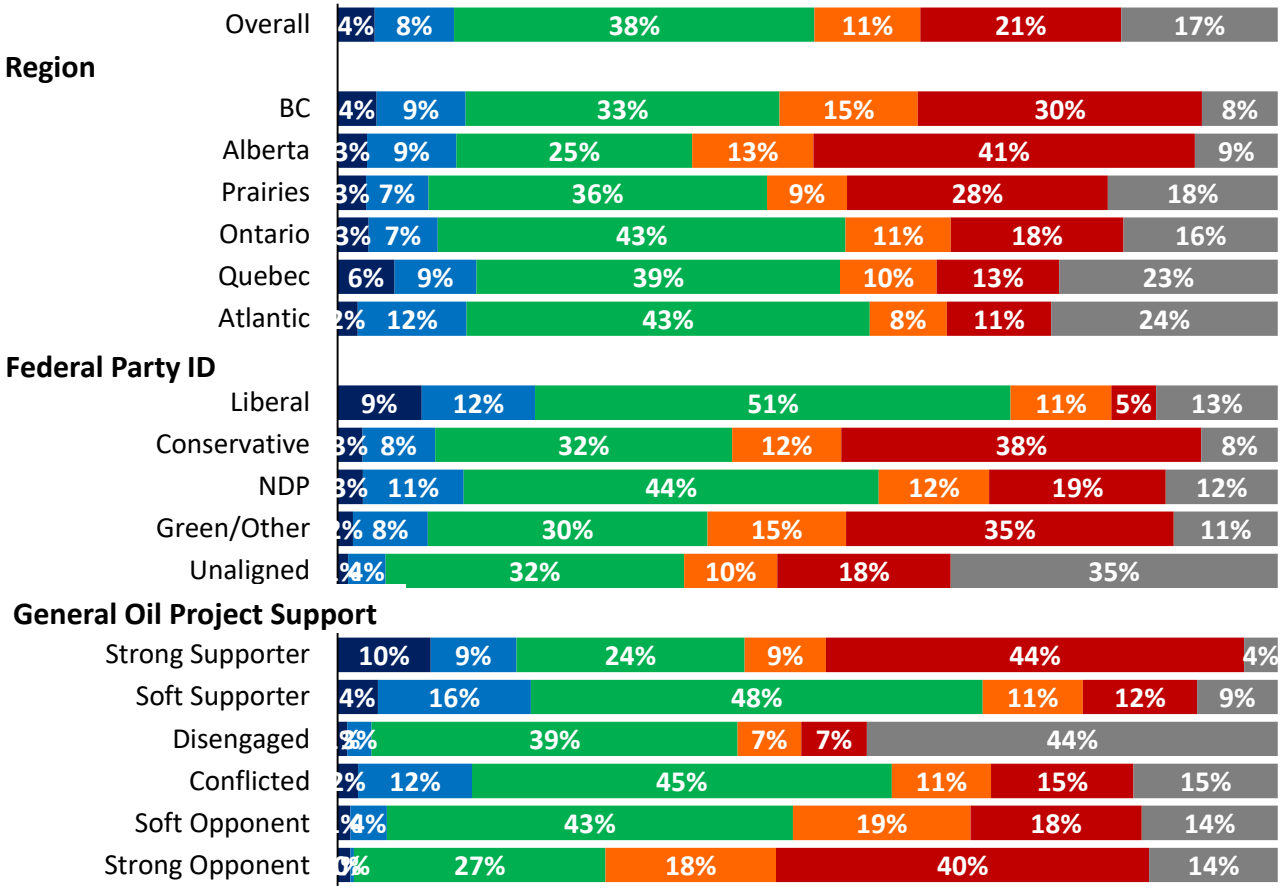
Impact on Vote: Net positive impact only among Liberal partisans; most negative in AB and among Strong Opponents

Q Thinking overall about the Kinder Morgan pipeline issue, has the federal government's handling of the issue left you feeling more or less likely to vote for the Liberal party in the 2019 Federal Election?
BY Region, Federal Party ID and General Oil Project Support
[asked of all respondents, n=1,500]



	Total "More Likely"	Net "More Likely"
Overall	12%	-20%
Region		
BC	14%	-31%
Alberta	13%	-41%
Prairies	10%	-27%
Ontario	11%	-19%
Quebec	15%	-9%
Atlantic	14%	-6%
Federal Party ID		
Liberal	21%	+6%
Conservative	10%	-40%
NDP	13%	-17%
Green/Other	10%	-40%
Unaligned	5%	-23%
General Oil Project Support		
Strong Supporter	19%	-34%
Soft Supporter	21%	-2%
Disengaged	4%	-10%
Conflicted	14%	-11%
Soft Opponent	5%	-32%
Strong Opponent	2%	-56%

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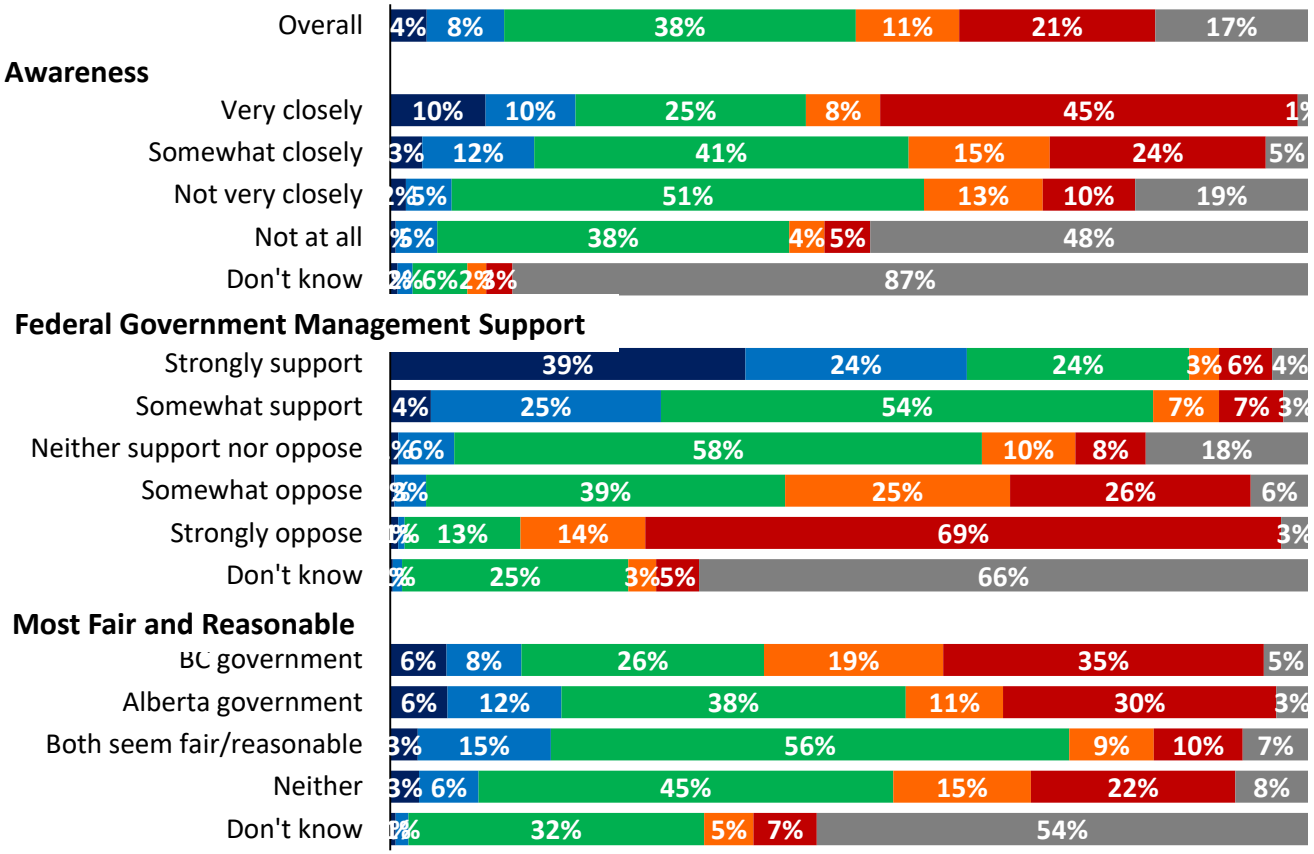
Impact on Vote: Net positive impact only among those who support federal government management of expansion

Q Thinking overall about the Kinder Morgan pipeline issue, has the federal government's handling of the issue left you feeling more or less likely to vote for the Liberal party in the 2019 Federal Election?
BY Awareness and Federal Government Support
[asked of all respondents, n=1,500]



	Total "More Likely"	Net "More Likely"
Overall	12%	-20%
Awareness		
Very closely	20%	-33%
Somewhat closely	16%	-23%
Not very closely	7%	-16%
Not at all	5%	-4%
Don't know	2%	-2%
Federal Government Management Support		
Strongly support	63%	+54%
Somewhat support	29%	+15%
Neither support nor oppose	7%	-11%
Somewhat oppose	4%	-47%
Strongly oppose	2%	-81%
Don't know	1%	-6%
Most Fair and Reasonable		
BC government	14%	-40%
Alberta government	19%	-22%
Both seem fair/reasonable	17%	-1%
Neither	10%	-28%
Don't know	2%	-10%

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