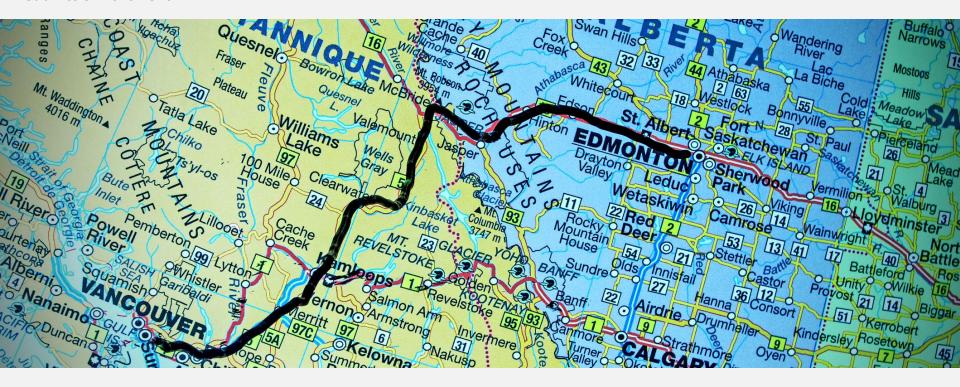
Majority of Canadians are aware that taxpayers own the Trans Mountain pipeline; Canadians are divided when it comes to the expansion of the oil and gas infrastructure

Dogwood TMX | Summary | Confidential | Draft

Conducted by Nanos for Dogwood, February 2020 Submission 2020-1576







# Manos Dogwood NANOS

## **SUMMARY**

Close to nine in ten Canadians report being aware that Canadian taxpayers own the Trans Mountain pipeline

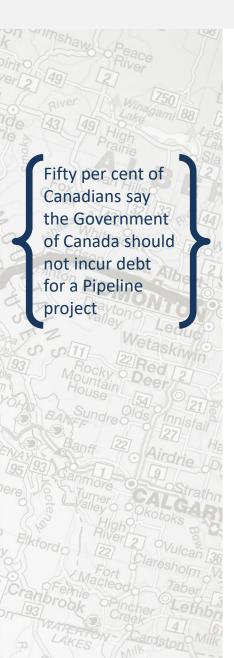
While a majority of Canadians report being aware that Canadian taxpayers own the Trans Mountain pipeline, Canadians are divided on the topic of oil and gas infrastructure expansion and are marginally more likely to support or somewhat support using public money to build the Trans Mountain Expansion than oppose or somewhat oppose this.

- Nearly nine in ten Canadians report being aware that Canadian taxpayers own the Trans Mountain pipeline A majority of Canadians report being aware (86%) that Canadian taxpayers own the Trans Mountain pipeline, while over one in ten report being unaware (14%). Residents from the Prairies are more likely to report being aware (92%) than residents of Quebec (81%). Men are more likely to report being aware (92%) than women (80%), and older Canadians (those 55 and older) are more likely to report being aware (92%) than younger Canadians (83% of those 35 to 54 years old; 81% of those 18 to 34 years old).
- Canadians are marginally more likely to support or somewhat support using public money to build the Trans Mountain Expansion pipeline Canadians are marginally more likely to support (31%) or somewhat support (25%) using public money to build the Trans Mountain Expansion pipeline than oppose (24%) or somewhat oppose (16%) this. Four per cent are unsure. Canadians from the Prairies are more likely to support (47%) or somewhat support (23%) this, while Quebecers are less likely (13% support, 24% somewhat support) to do so.
- Canadians are split when it comes to the expansion of oil and gas infrastructure Asked which statement best reflects their views, under one in two (47%) say the world needs to stop expanding oil and gas infrastructure because of its impact on climate change, while over four in ten (43%) say we need resource projects like Trans Mountain pipeline to create jobs. Ten per cent are unsure. Quebecers (62%) are most likely to say we need to stop expanding oil and gas because of impact on climate change, while Canadians from the Prairies (65%) are most likely to say we need resource projects like Trans Mountain to create jobs. Men (60%) were more likely than women (35%) to say we need resource projects like Trans Mountain to create jobs. Older Canadians (58% of Canadians 55 and older) are more likely to say we need resource projects like Trans Mountain to create jobs than younger Canadians (40% of 18-34 year olds). \*Please note that this questions was asked of half the sample (n=500).

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### **SUMMARY**





- Canadians are most likely to say the Government of Canada should not incur debt for a Pipeline project Asked which statement best reflects their personal opinion, fifty per cent of Canadians (50%) say that the Government of Canada should not incur debt for a Pipeline project, while just over one in three (35%) say it was a good decision for the Government of Canada to borrow money on Trans Mountain Pipeline. Fifteen per cent are unsure. Residents of the Prairies (49%, compared to 35% of Canadians overall) were more likely to say that it was a good decision for the Government of Canada to borrow money on Trans Mountain Pipeline . \*Please note that this questions was asked of half the sample (n=503).
- Canadians are most likely to say that it should not cost taxpayers any money to build the Trans Mountain Expansion pipeline Asked what amount they feel is the maximum amount taxpayers should spend to build the Trans Mountain Expansion pipeline, Canadians are most likely to say it should not cost taxpayers any money (43%), followed by the current cost of \$9.3 billion (21%), whatever it takes to complete it (16%), and up to \$12 billion but no more (eight per cent). Twelve per cent are unsure. Quebecers are more likely to say it should not cost taxpayers any money (59%, compared to 43% of Canadians overall), while Canadians from the Prairies are more likely to say whatever it takes to complete it (27%, compared to 16% of Canadians overall).
- Canadians are more likely to say the Trans Mountain Expansion should be sold to a private company at the best price it can get rather than to build it with public money or cancel it and write off any losses Asked which statement comes closest to their own view when it comes to the Trans Mountain Expansion, four in ten Canadians say the government should sell the project to a private company at the best price it can get (40%) and one in three (33%) say the government should build the pipeline with public money. Under two in ten (17%) say the government should cancel the project and write off any losses. Eleven per cent are unsure. Quebecers (28%, compared to 17% of Canadians overall) are more likely to say cancel the project and write off any losses, while Canadians from the Prairies are more likely to say build the pipeline with public money (42%, compared to 33% of Canadians overall).

### **SUMMARY**



Nearly three in ten Canadians say the government should invest the money in renewable energy and the environment if the Trans Mountains Expansion project does not go ahead • If the Trans Mountain Expansion project did not go ahead, Canadians are most likely to say they would want the government to invest the money in renewable energy and the environment — Asked what they would like the government of Canada to do with the money if the Trans Mountain Expansion project did not go ahead, Canadians most frequently say investing it in renewable energy and the environment (29%), followed by paying off the debt (15%), investing in social programs (11%), giving the money back to taxpayers/tax breaks (nine per cent) and investing it in healthcare/pharmacare (eight per cent).

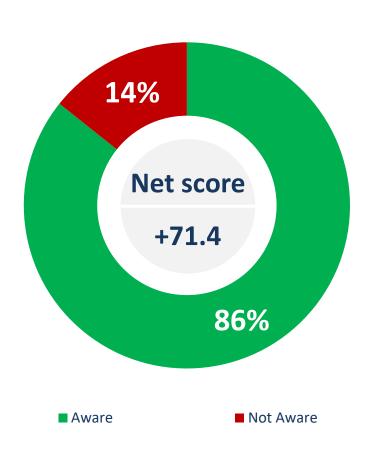
Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,003 Canadians, 18 years of age or older, between January 27<sup>th</sup> and 29<sup>th</sup>, 2020 as part of an omnibus survey. The margin of error for a random survey of 1,003 Canadians is ±3.1 percentage points, 19 times out of 20.

This study was commissioned by Dogwood BC and the research was conducted by Nanos Research.

# NANOS RESEARCH

# Ownership of Trans Mountain oil pipeline awareness





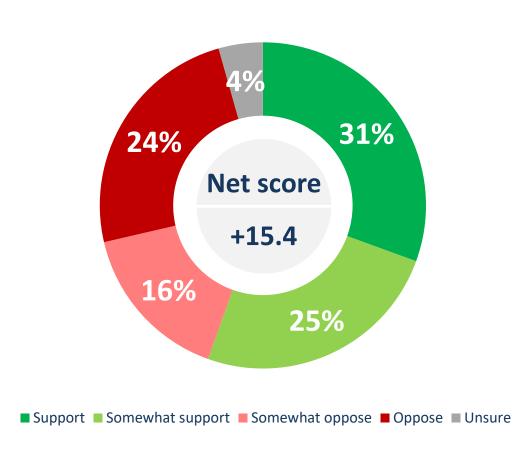
	Aware
Atlantic (n=110)	85.7%
Quebec (n=207)	81.0%
Ontario (n=309)	83.4%
Prairies (n=216)	92.2%
British Columbia (n=161)	91.8%
Male (n=529)	91.9%
Female (n=474)	79.8%
18 to 34 (n=327)	80.6%
35 to 54 (n=396)	82.7%
55 plus (n=280)	92.1%

<sup>\*</sup>Weighted to the true population proportion.

**QUESTION** – In 2018 the federal government purchased the existing Trans Mountain oil pipeline for \$4.5 billion dollars. Before today, were you aware or not aware that Canadian taxpayers own the Trans Mountain pipeline?

<sup>\*</sup>Charts may not add up to 100 due to rounding.





	Support/ somewhat support
Atlantic (n=110)	66.4%
Quebec (n=207)	37.1%
Ontario (n=309)	58.1%
Prairies (n=216)	69.5%
British Columbia (n=161)	55.3%
Male (n=529)	64.3%
Female (n=474)	47.0%
18 to 34 (n=327)	47.0%
35 to 54 (n=396)	51.0%
55 plus (n=280)	65.5%
and the second second	

<sup>\*</sup>Weighted to the true population proportion.

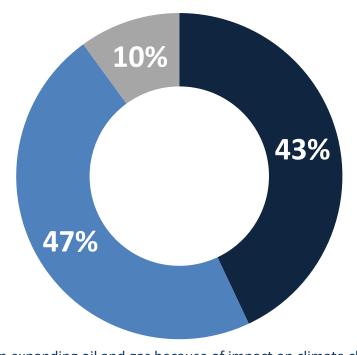
QUESTION – The plan is to build a second pipeline called the Trans Mountain Expansion, which will increase capacity for transporting oil to markets. Do you support, somewhat support, somewhat oppose or oppose using public money to build the Trans Mountain Expansion pipeline?

<sup>\*</sup>Charts may not add up to 100 due to rounding.

# NANOS RESEARCH

# Expansion of oil and gas infrastructure





■ Stop expanding oil and gas because of impact on climate chang	ge
---	----

<sup>■</sup> Need resource projects like Trans Mountain to create jobs

	Stop expanding oil and gas	Need resource projects
Atlantic (n=53)	42.1%	50.0%
Quebec (n=105)	62.3%	30.5%
Ontario (n=140)	39.0%	47.0%
Prairies (n=118)	28.3%	64.7%
British Columbia (n=84)	41.8%	48.1%
Male (n=263)	32.5%	60.0%
Female (n=237)	53.0%	34.5%
18 to 34 (n=168)	54.3%	39.9%
35 to 54 (n=188)	46.4%	40.7%
55 plus (n=144)	31.6%	57.6%
*\A/aiabtad to the two population	nuanaution	

<sup>\*</sup>Weighted to the true population proportion.

**QUESTION – [SPLIT SAMPLE A]** [ROTATE TWO POSITIONS] Critics of the Trans Mountain pipeline say that Canada and countries around the world need to stop expanding oil and gas infrastructure because of its impact on climate change. Supporters say we need resource projects like Trans Mountain pipeline to create jobs. Which of the two views best reflects your personal opinion?

<sup>■</sup> Unsure

<sup>\*</sup>Charts may not add up to 100 due to rounding.

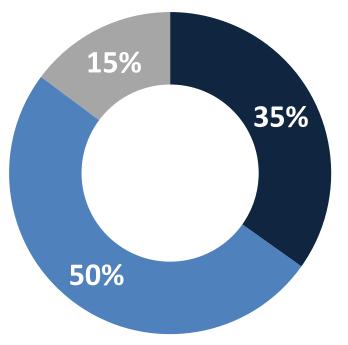
# O NANOC PECEABCH

# Borrowing money to finance the pipeline



Should not

**Good decision** 



■ Good decision for the Government of Canada to borrow money on
Trans Mountain Pipeline

<sup>■</sup> The Government of Canada should not incur debt for a Pipeline project

Unsure

	incur debt for a Pipeline project	to borrow money on Trans Mountain Pipeline
Atlantic (n=57)	39.8%	39.4%
Quebec (n=102)	59.1%	30.3%
Ontario (n=169)	51.3%	31.5%
Prairies (n=198)	36.3%	49.2%
British Columbia (n=77)	55.3%	32.7%
Male (n=266)	48.0%	42.9%
Female (n=237)	52.6%	27.1%
18 to 34 (n=159)	55.3%	31.2%
35 to 54 (n=208)	48.8%	33.7%
55 plus (n=136)	48.6%	38.3%

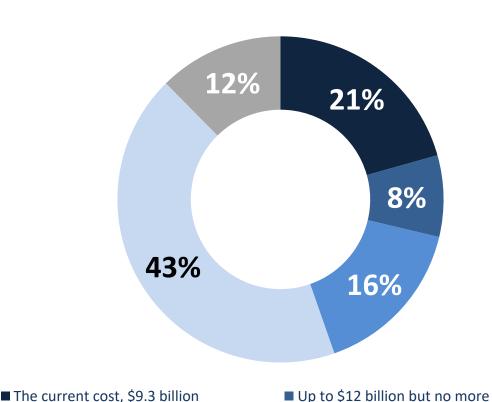
<sup>\*</sup>Weighted to the true population proportion.

**QUESTION** – **[SPLIT SAMPLE B]** [ROTATE TWO POSITIONS] Some people say it was a good decision for the Government of Canada to borrow \$6.5 billion dollars to finance the Trans Mountain pipeline even if there are cost overruns. Others say that the Government of Canada should not incur more debt for a pipeline project. Which of the two views best reflects your personal opinion?

<sup>\*</sup>Charts may not add up to 100 due to rounding.

# Maximum amount taxpayers should spend to build the pipeline





It sh	ould	not	cost	
taxpav	ers a	any r	none	٩V

Atlantic (n=110)	35.4%
Quebec (n=207)	59.1%
Ontario (n=309)	39.8%
Prairies (n=216)	32.0%
British Columbia (n=161)	42.7%
Male (n=529)	40.3%
Female (n=474)	45.5%
18 to 34 (n=327)	45.4%
35 to 54 (n=396)	42.4%
55 plus (n=280)	41.7%

<sup>\*</sup>Weighted to the true population proportion.

■ Whatever it takes to complete it

**QUESTION** – The most recent cost estimate is \$9.3 billion dollars to complete the Trans Mountain Expansion. What do you feel is the maximum amount taxpayers should spend to build the pipeline?

<sup>■</sup> Up to \$12 billion but no more \*Charts may not add up to 100 due to rounding.

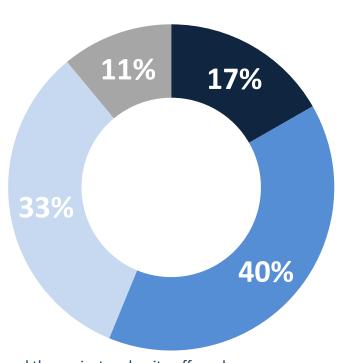
It should not cost taxpayers any money

<sup>■</sup> Unsure

# NANOS RESEARCH

## Options when it comes to the Trans Mountain expansion pipeline





■ Cancel the project and write off any losses
---

<sup>■</sup> Sell the project to a private company at the best price it can get

■ Not sure

	Sell the project to a private company	Build the pipeline with public money
Atlantic (n=110)	41.2%	35.0%
Quebec (n=207)	38.0%	24.2%
Ontario (n=309)	38.6%	32.3%
Prairies (n=216)	47.2%	42.0%
British Columbia (n=161)	33.3%	35.5%
Male (n=529)	45.4%	36.9%
Female (n=474)	33.9%	28.8%
18 to 34 (n=327)	35.9%	30.7%
35 to 54 (n=396)	39.3%	31.9%
55 plus (n=280)	42.2%	35.0%

<sup>\*</sup>Weighted to the true population proportion.

**QUESTION** – The Canadian government has three options when it comes to the Trans Mountain Expansion pipeline. Which of the following is closer to your own view? [RANDOMIZE]

<sup>■</sup> Build the pipeline with public money

<sup>\*</sup>Charts may not add up to 100 due to rounding.

# Use of money if Expansion does not go ahead



Top mentions	Frequency (n=846)
Invest in renewable energy/the environment	29.0%
Pay off debt	15.2%
Invest in social programs	10.7%
Give the money back to taxpayers/tax breaks	9.4%
Invest in Healthcare/Pharmacare	8.2%
Job creation	4.3%
Build another pipeline/ invest in oil and refineries	4.3%

**QUESTION** – If the Trans Mountain Expansion project did not go ahead, what would you like the Government of Canada to do with the money? [OPEN]



## **METHODOLOGY**



Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,003 Canadians, 18 years of age or older, between January 27<sup>th</sup> and 29<sup>th</sup>, 2020 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. 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 were randomly called using random digit dialling with a maximum of five call backs.

The margin of error for this survey is ±3.1 percentage points, 19 times out of 20.

The research was commissioned by Dogwood and was conducted by Nanos Research.

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

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## **TECHNICAL NOTE**



Element	Description	Element	Description
Research sponsor	Dogwood		The results were weighted by age and gender using the latest Census information (2016) and the sample is geographically
Population and Final Sample Size	1003 Randomly selected individuals.	Weighting of Data	stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Source of Sample	Dynata	Caraanina	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media
Type of Sample	Probability	Screening	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	Individuals younger than 18 years old; individuals without land or cell lines, and individuals without internet access could not
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Demographics	participate.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Stratification	By age and gender using the latest Census information (2016) 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.
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.	Estimated Response Rate	Nine percent, consistent with industry norms.
Fieldwork/Validation	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Number of Calls	Maximum of five call backs.		This was module six of an omnibus survey. Previous content included the Royal Family, the Conservative Party, diplomatic
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Question Content	relations with Iran, new jobs, CEOs, and the Canadian Nuclear regulator.
Field Dates	January 27 <sup>th</sup> to 29 <sup>th</sup> 2020.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Language of Survey	The survey was conducted in both English and French.	Research/Data Collection Supplier	Nanos Research
Standards	Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements.  https://canadianresearchinsightscouncil.ca/standards/	Contact	Contact Nanos Research for more information or with any concerns or questions. <a href="http://www.nanos.co">http://www.nanos.co</a> Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com.

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		-			Reg	gion			Ge	nder	Age		
			Canada 2020-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - In 2018 the federal government	Total	Unwgt N	1003	110	207	309	216	161	529	474	327	396	280
ourchased the existing Trans Mountain oil pipeline for \$4.5 billion		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
dollars. Before today, vere you aware or not aware that Canadian taxpayers	Aware	%	85.7	85.7	81.0	83.4	92.2	91.8	91.9	79.8	80.6	82.7	92.:
own the Trans Mountain pipeline?	Not aware	%	14.3	14.3	19.0	16.6	7.8	8.2	8.1	20.2	19.4	17.3	7.9

		-			Reg	gion			Ge	nder		Age		
			Canada 2020-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus	
Question - The plan is to build a second	Total	Unwgt N	1003	110	207	309	216	161	529	474	327	396	280	
pipeline called the Trans Mountain Expansion, which will		Wgt N	1000	67	233	384	183	133	490	510	273	341	386	
increase capacity for transporting oil to	Support	%	30.6	35.7	13.3	29.3	47.0	39.3	38.3	23.2	26.0	25.9	38.0	
markets. Do you support, somewhat support, somewhat	Somewhat support	%	24.9	30.7	23.8	28.8	22.5	16.0	26.0	23.8	21.0	25.1	27.5	
oppose or oppose using public money to build the Trans	Somewhat oppose	%	15.9	12.1	20.3	17.3	9.8	14.6	11.5	20.1	19.8	19.7	9.8	
Mountain Expansion pipeline?	Oppose	%	24.2	14.5	36.1	19.7	18.7	29.1	22.7	25.7	29.0	24.7	20.5	
	Not sure	%	4.4	7.0	6.6	4.9	2.0	1.1	1.5	7.1	4.2	4.6	4.3	

					Reg	gion			Ge	nder		Age	
			Canada 2020-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question – [ASKED ONLY OF SAMPLE A] [ROTATE TWO POSITIONS] Critics of	Total	Unwgt N	500	53	105	140	118	84	263	237	168	188	144
the Trans Mountain pipeline say that Canada and countries		Wgt N	489	34	116	171	98	71	239	250	142	160	188
around the world need to stop expanding oil and gas nfrastructure pecause of its impact	Stop expanding oil and gas because of impact on climate change	%	43.0	42.1	62.3	39.0	28.3	41.8	32.5	53.0	54.3	46.4	31.6
on climate change. Supporters say we need resource projects like Trans Mountain pipeline to	Need resource projects like Trans Mountain to create jobs	%	47.0	50.0	30.5	47.0	64.7	48.1	60.0	34.5	39.9	40.7	57.
reate jobs. Which of he two views best eflects your personal pinion?	Unsure	%	10.0	7.9	7.2	14.0	7.0	10.1	7.5	12.5	5.7	12.9	10.

					Reg	gion			Ge	nder	Age		
			Canada 2020-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question – [ASKED ONLY OF SAMPLE B][ROTATE TWO	Total	Unwgt N	503	57	102	169	98	77	266	237	159	208	136
POSITIONS] Some people say it was a good decision for the Government of		Wgt N	511	33	117	213	85	62	251	260	131	182	198
Canada to borrow \$6.5 billion dollars to finance the Trans Mountain pipeline even if there are cost overruns. Others say that the Government	Good decision for the Government of Canada to borrow money on Trans Mountain Pipeline	%	34.8	39.4	30.3	31.5	49.2	32.7	42.9	27.1	31.2	33.7	38.3
of Canada should not incur more debt for a pipeline project. Which of the two views best reflects	The Government of Canada should not incur debt for a Pipeline project	%	50.4	39.8	59.1	51.3	36.3	55.3	48.0	52.6	55.3	48.8	48.6
your personal opinion?	Unsure	%	14.8	20.8	10.5	17.2	14.5	12.0	9.1	20.3	13.5	17.6	13.1



		•			Reg	gion			Ge	nder		Age	
			Canada 2020-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - The most recent cost estimate	Total	Unwgt N	1003	110	207	309	216	161	529	474	327	396	280
is \$9.3 billion dollars to complete the Trans		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
Mountain Expansion. What do you feel is the maximum	The current cost, \$9.3 billion	%	20.6	24.6	14.8	22.8	21.7	21.1	21.2	20.1	19.6	23.4	18.9
amount taxpayers should spend to build the pipeline?	Up to \$12 billion but no more	%	8.1	13.1	4.5	7.8	11.5	7.9	9.7	6.5	8.2	6.7	9.3
	Whatever it takes to complete it	%	15.9	12.6	11.0	13.2	26.8	19.1	21.2	10.8	13.6	14.3	19.0
	It should not cost taxpayers any money	%	43.0	35.4	59.1	39.8	32.0	42.7	40.3	45.5	45.4	42.4	41.7
	Unsure	%	12.4	14.2	10.6	16.3	8.0	9.2	7.5	17.1	13.2	13.3	11.1

					Reg	gion			Gender			Age	
			Canada 2020-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - The Canadian government has three options when it comes to the Trans Mountain Expansion pipeline. Which of the following is closer to your own view? [RANDOMIZE]	Total	Unwgt N	1003	110	207	309	216	161	529	474	327	396	280
		Wgt N	1000	67	233	384	183	133	490	510	273	341	386
	Cancel the project and write off any losses	%	16.7	11.3	27.6	14.5	5.6	22.2	11.3	21.9	22.6	16.2	13.0
	Sell the project to a private company at the best price it can get	%	39.5	41.2	38.0	38.6	47.2	33.3	45.4	33.9	35.9	39.3	42.2
	Build the pipeline with public money	%	32.8	35.0	24.2	32.3	42.0	35.5	36.9	28.8	30.7	31.9	35.0
	Unsure	%	11.0	12.5	10.3	14.6	5.3	9.0	6.4	15.4	10.9	12.6	9.8

		-			Reg	gion			Ge	nder		Age	
			Canada 2020-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - If the Trans Mountain	Total	Unwgt N	846	91	179	254	186	136	459	387	274	333	239
Expansion project did not go ahead, what		Wgt N	842	54	202	317	158	112	427	415	229	285	328
would you like the Government of Canada to do with	Invest in Healthcare/Pharmacare	%	8.2	17.9	8.8	7.7	5.6	7.3	5.1	11.3	8.9	9.3	6.6
the money? [OPEN]	Invest in renewable energy/the environment	%	29.0	31.3	44.1	23.2	21.5	28.0	25.5	32.7	33.0	31.2	24.4
	Pay off debt	%	15.2	8.7	13.1	18.1	16.1	12.3	19.9	10.3	8.2	10.7	23.9
	Give to Indigenous communities	%	3.4	2.1	0.7	6.1	2.7	2.2	3.6	3.1	3.5	2.8	3.8
	Build another pipeline/ invest in oil and refineries	%	4.3	6.2	0.5	2.1	11.4	6.4	6.0	2.6	5.4	3.1	4.6
	Give the money back to taxpayers/tax breaks	%	9.4	8.2	10.8	9.1	8.3	10.0	11.1	7.7	9.8	12.7	6.3
	Invest in social programs	%	10.7	8.7	6.4	11.9	11.2	15.1	6.4	15.1	11.2	13.0	8.3
	Job creation	%	4.3	2.1	3.9	4.5	6.2	3.3	5.0	3.7	2.3	5.0	5.2
	Invest in Infrastructure	%	4.0	3.9	2.9	5.8	4.1	0.7	4.9	3.1	6.0	3.0	3.4
	It needs to go ahead	%	1.9	2.9	0.0	1.0	4.4	3.7	2.2	1.6	0.4	1.8	3.0
	Give it to the West/Diversify the economy of the West	%	1.2	0.0	0.0	1.2	2.0	2.6	1.8	0.5	2.0	1.0	0.7
	National Defense	%	0.6	1.2	0.3	0.3	0.5	1.4	1.1	0.0	0.0	0.9	0.7
	Nothing/save the money	%	0.3	0.0	0.0	0.5	0.3	0.0	0.5	0.0	0.8	0.2	0.0
	Other	%	4.4	3.1	5.3	3.8	4.6	4.8	3.8	5.0	5.0	3.6	4.7
	Unsure	%	3.3	3.7	3.1	4.7	1.0	2.4	3.2	3.4	3.5	1.7	4.5