



Alberta Government ▶▶

July 2008 Provincial Image and Issue Survey



Innovative Research Group, Inc. | www.innovativeresearch.ca

Overview

- Innovative was engaged to assess how Albertans and Canadians felt about:
 - Alberta's image compared to its peers
 - Views regarding the oil sands generally
 - Views on Carbon Capture and Storage vs. Cap and Trade
 - The performance and roles of the federal and provincial governments on oil sands



Methodology

- Telephone survey of 1 249 adults in Canada, 18 years and older conducted from June 27th to July 4th, 2008.
 - Of those, 501 are in Alberta. The Alberta subsample is weighted by region (Calgary, Edmonton and the rest of the province), age and gender and has an approximate margin of error of ± 4.4 , 19 times out of 20.
 - In the rest of Canada, 748 phone interviews were conducted. In the national sample, we weighted down Alberta interviews to Alberta's real demographic weight in Canada. The national sample is weighted by region (BC, Alberta, Rest of Prairies, Ontario, Québec and Atlantic), age and gender and is equal to $n=820$. Margin of error for the national sample is approximately ± 3.4 , 19 times out of 20.

Note: Graphs may not always total 100% due to rounding values rather than any error in data.

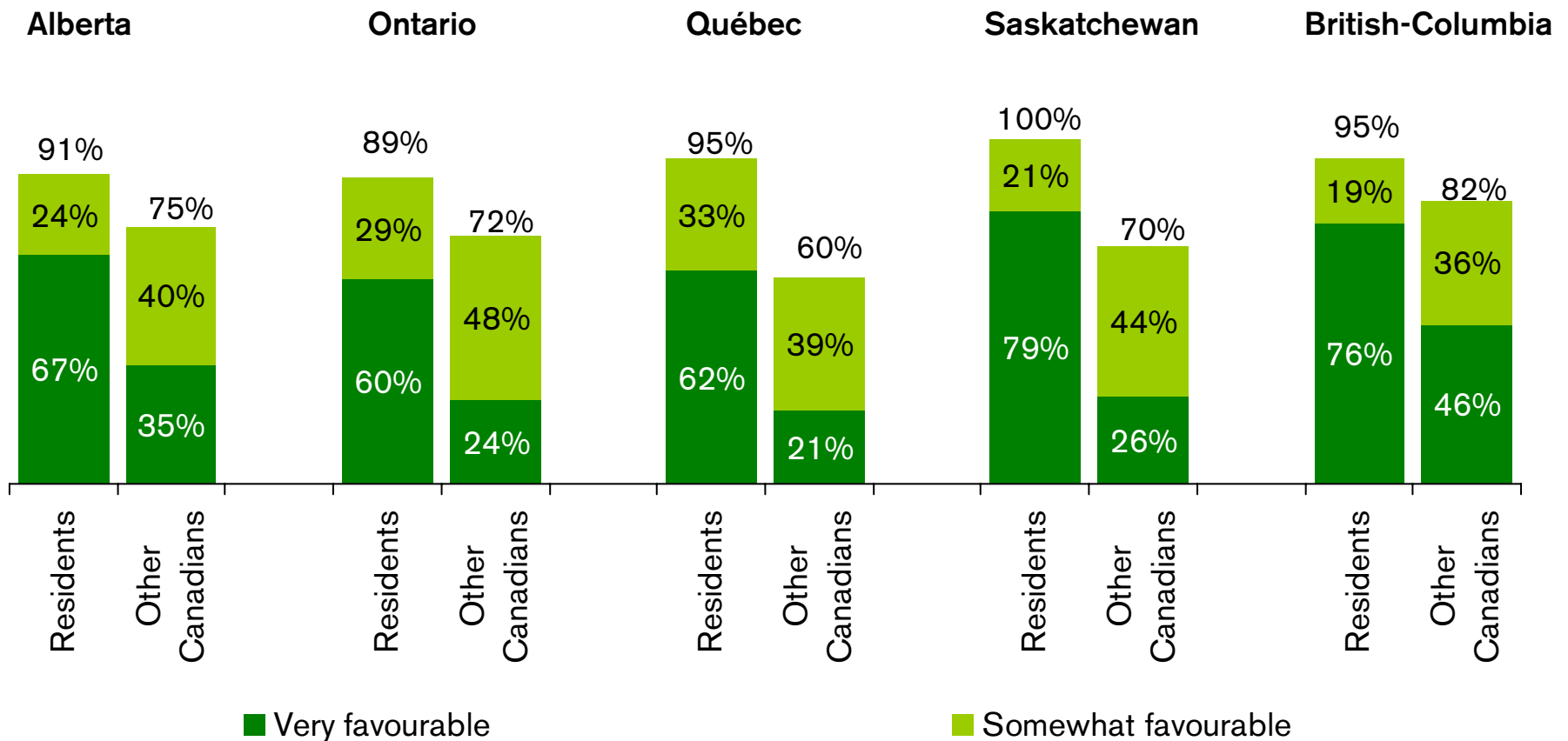


Provincial favourability



Alberta image compares favourably to other provinces

Q Thinking about some of the provinces here in Canada, overall would you say you have a very favourable, a somewhat favourable, a somewhat unfavourable or a very unfavourable impression of the following provinces?

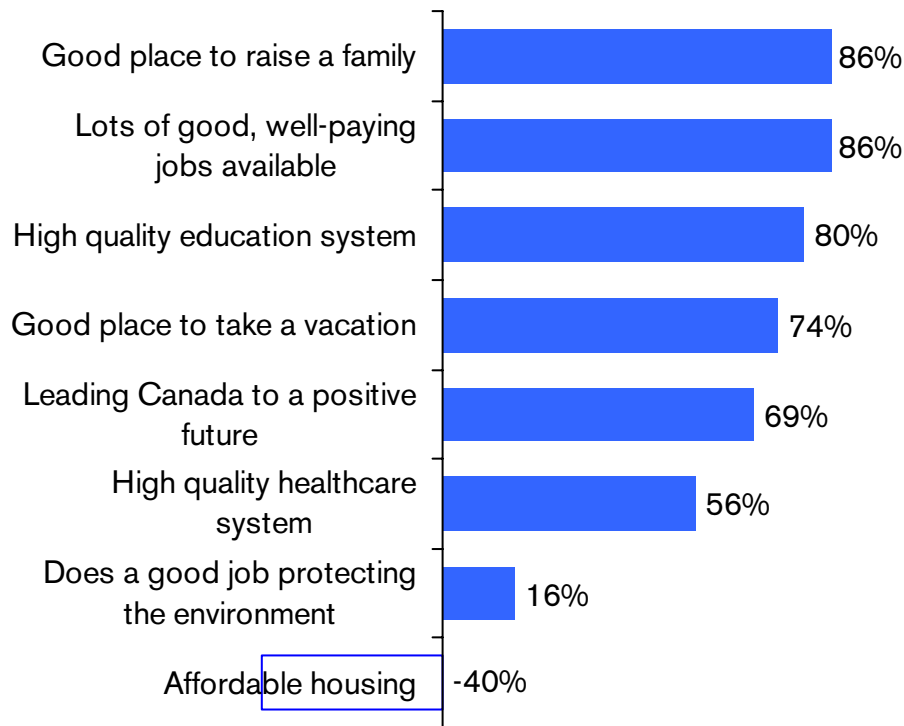


Jobs define Alberta outside province, affordable housing and environment weak points ⁶

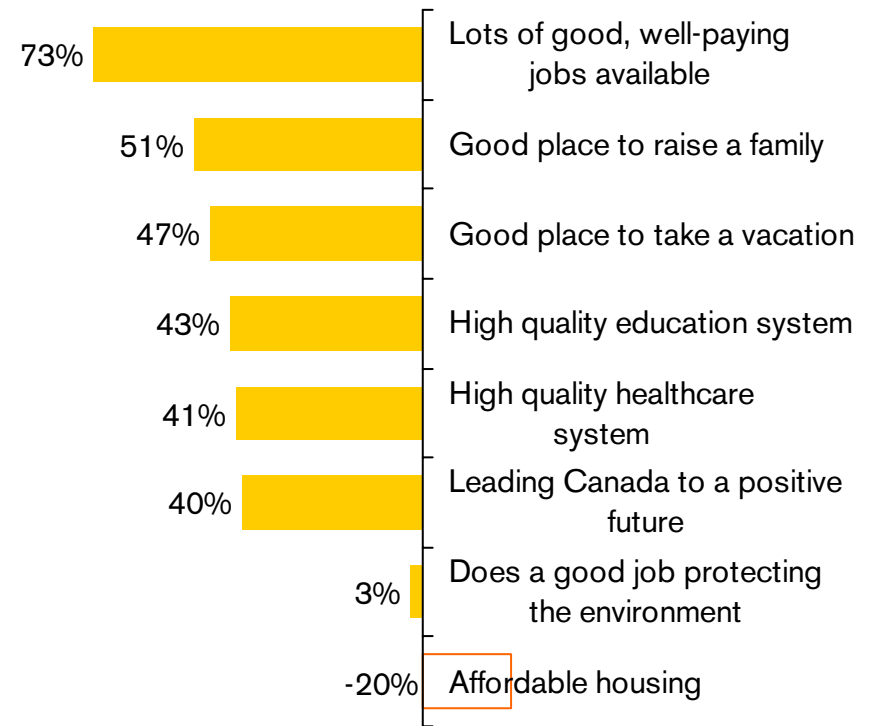


How well do each of the following words or phrases describe each of the following provinces?
Alberta - (Net describes well)

Residents of Alberta



Not residents of Alberta



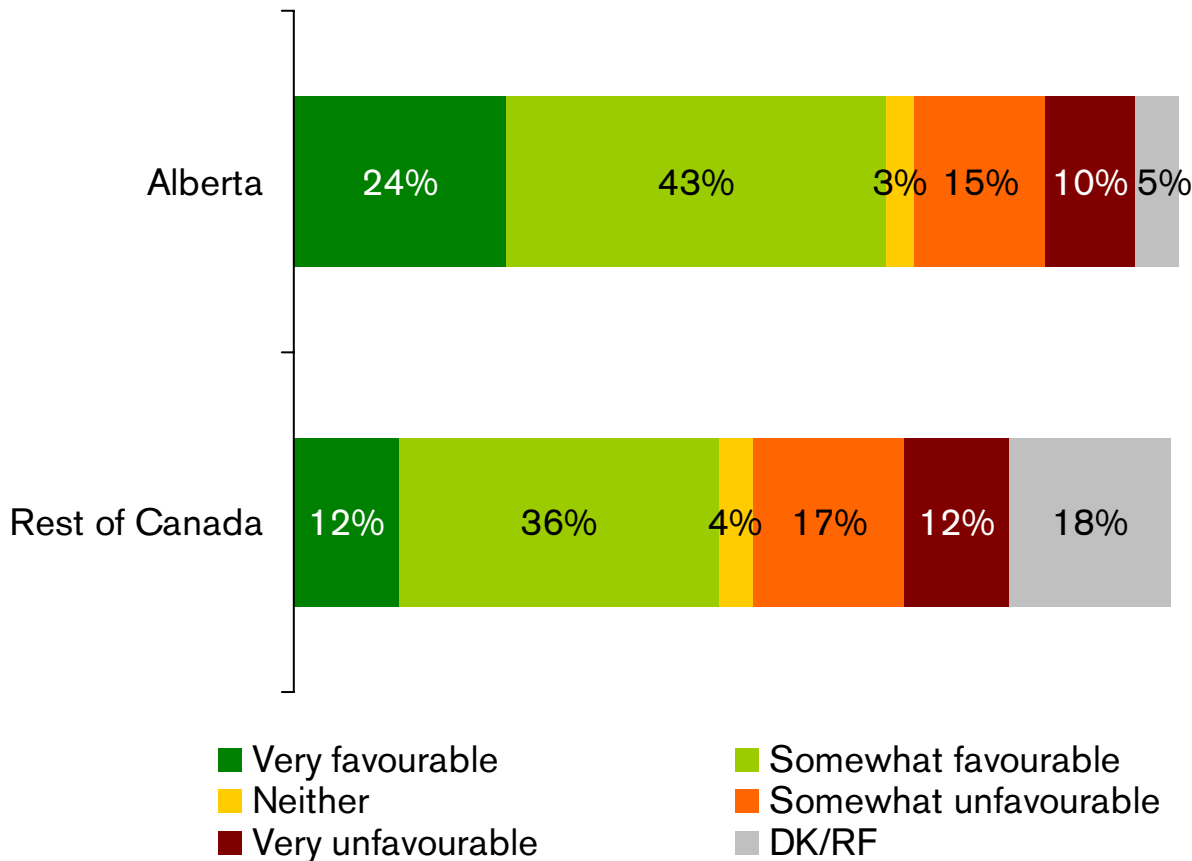
Initial reaction towards oil sands



Canadians generally favourable to oil sands, Albertans even more so again



Overall, would you say you have a very favourable, a somewhat favourable, a somewhat unfavourable or a very unfavourable impression of the Canada's oil sands projects?



Those that respond 'Very Favourable'

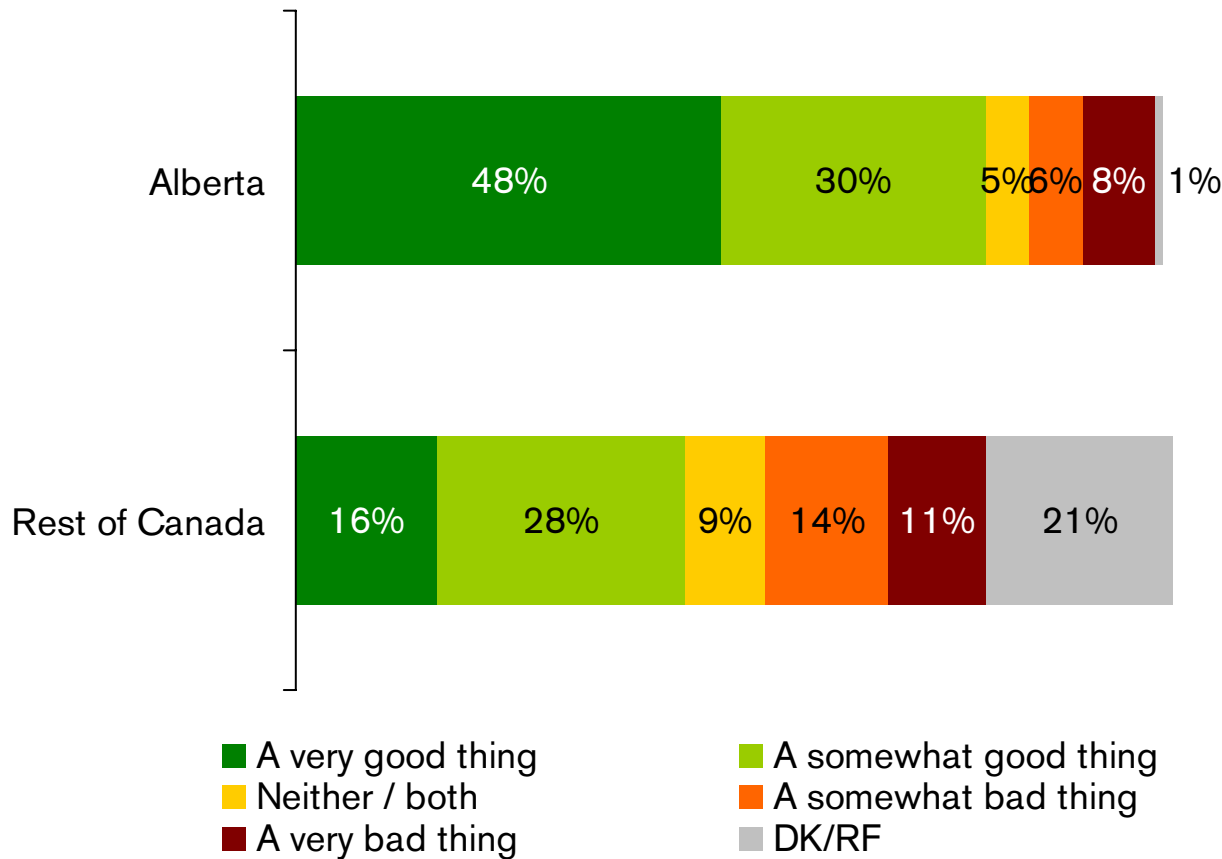
Alberta	<u>24%</u>
BC	17%
SK	--
Ontario	12%
Quebec	11%
Other	8%



More Canadians think oil sands are good for their province than bad



How about in the province where you live? Do you feel the development of the oil sands is a good thing or a bad thing for your province?



Those that respond 'Good thing'

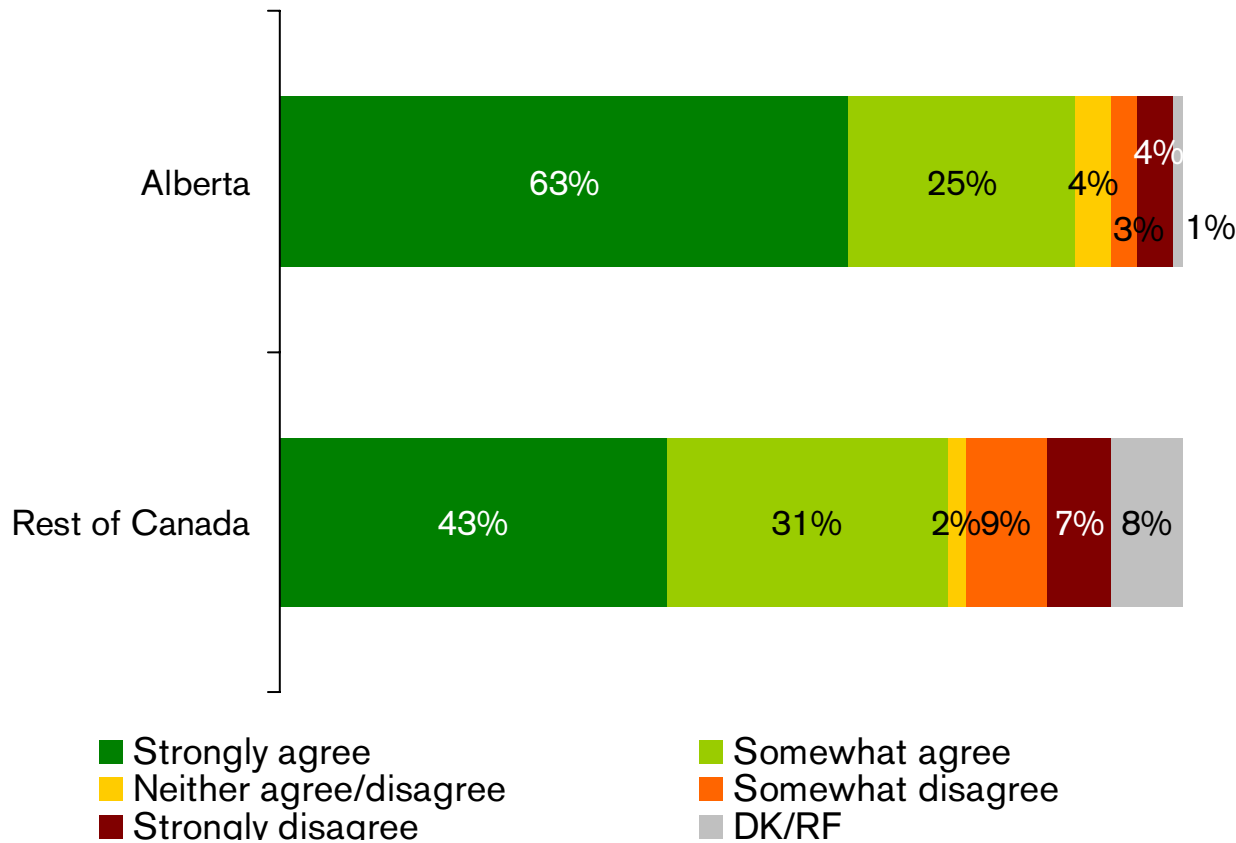
Alberta	78%
BC	46%
SK	68%
Ontario	47%
Quebec	32%
Other	47%
18-34	41%
35-54	49%
55+	52%
Men Work	56%
Men Not W	52%
Women NW	58%
Women W	61%



Majority of Canadians feel lucky to 'have' oil sands



Canada is lucky to have the oil sands

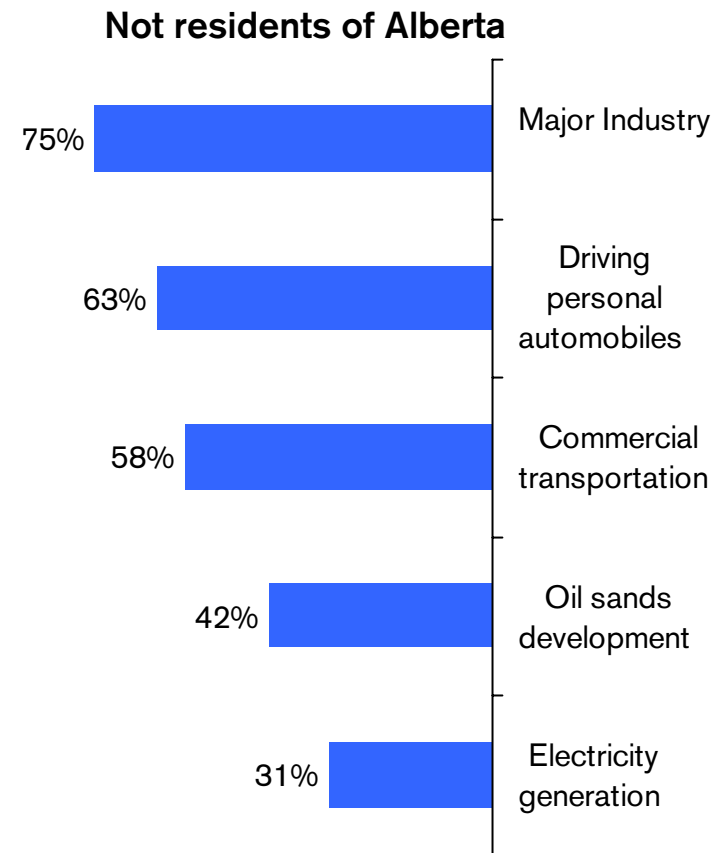
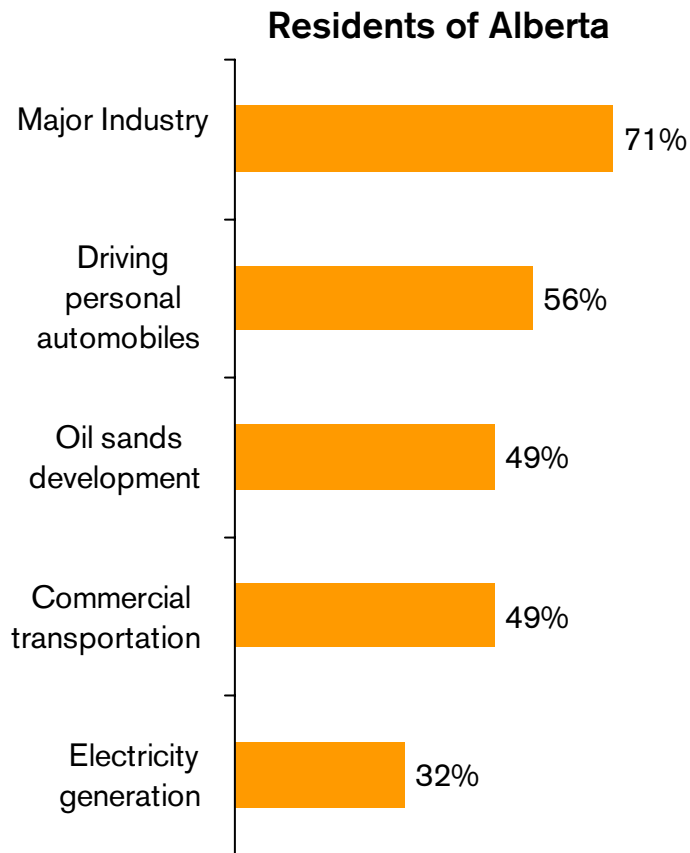


Environment



Albertans and Canadians say cars and industry biggest part of the problem

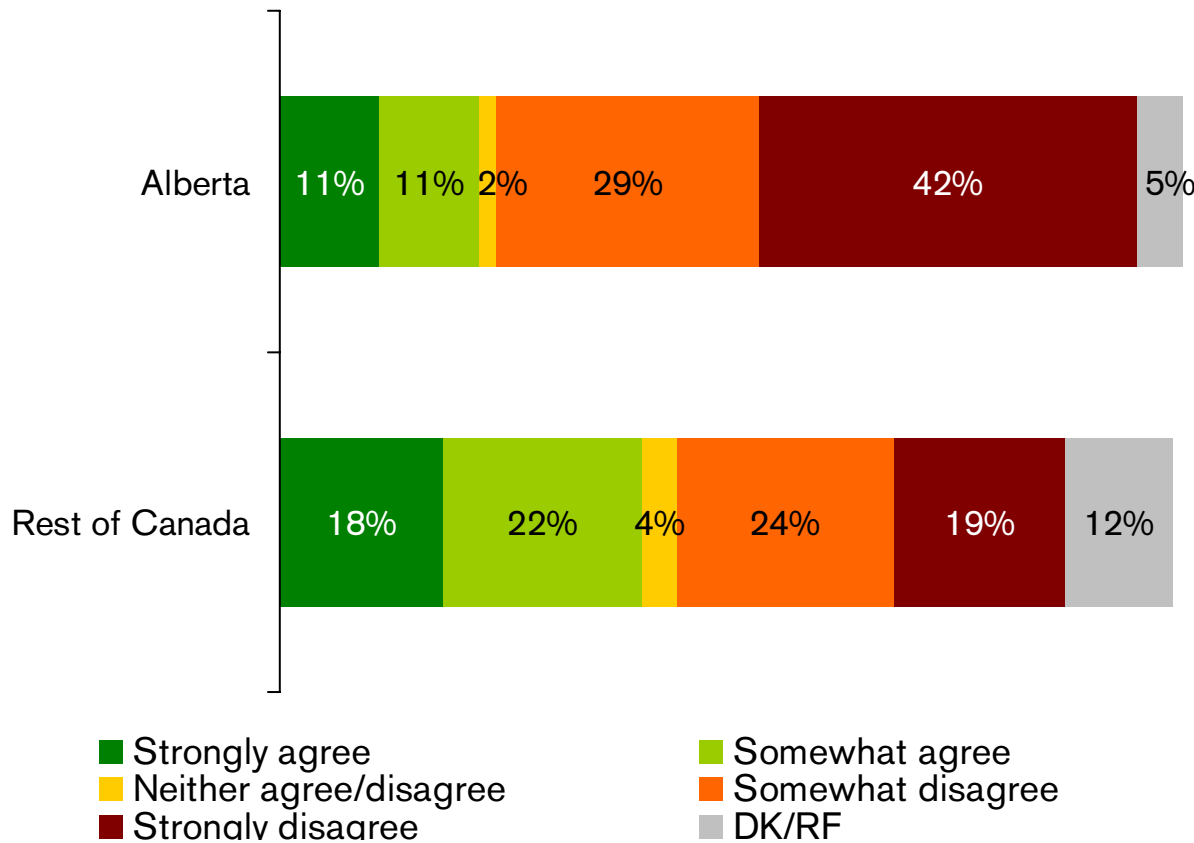
Q I am going to read you a list of activities that may generate greenhouse gasses that contribute to climate change. Please tell me if you think each of these activities is a **major** part of the problem, a **minor** part of the problem or not part of the problem. (Percentage saying **major** part of the problem)



Large majority of Albertans reject idea oil sands create unacceptable harm



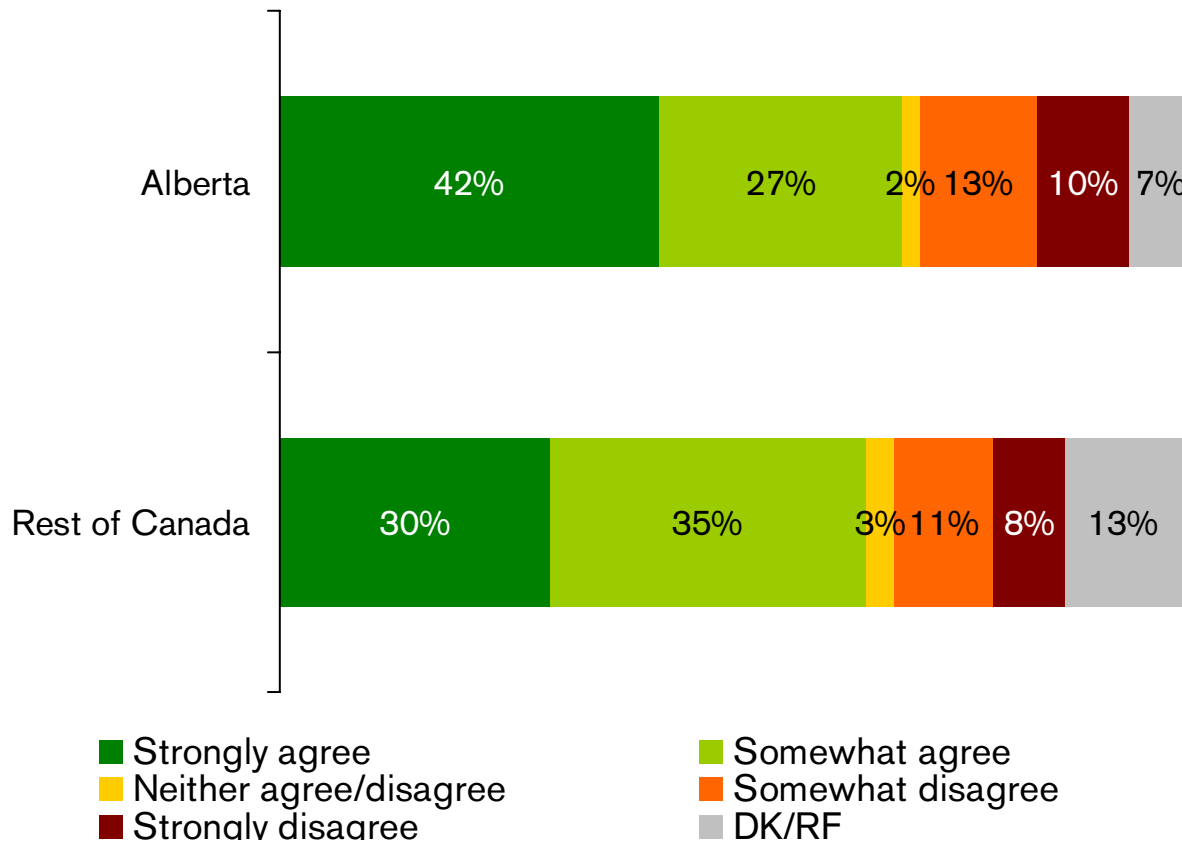
The government should stop the oil sands developments because there is no way they can be developed without creating unacceptable damage to the environment



Majority of Canadians believe government could curb emissions without affecting oil sands



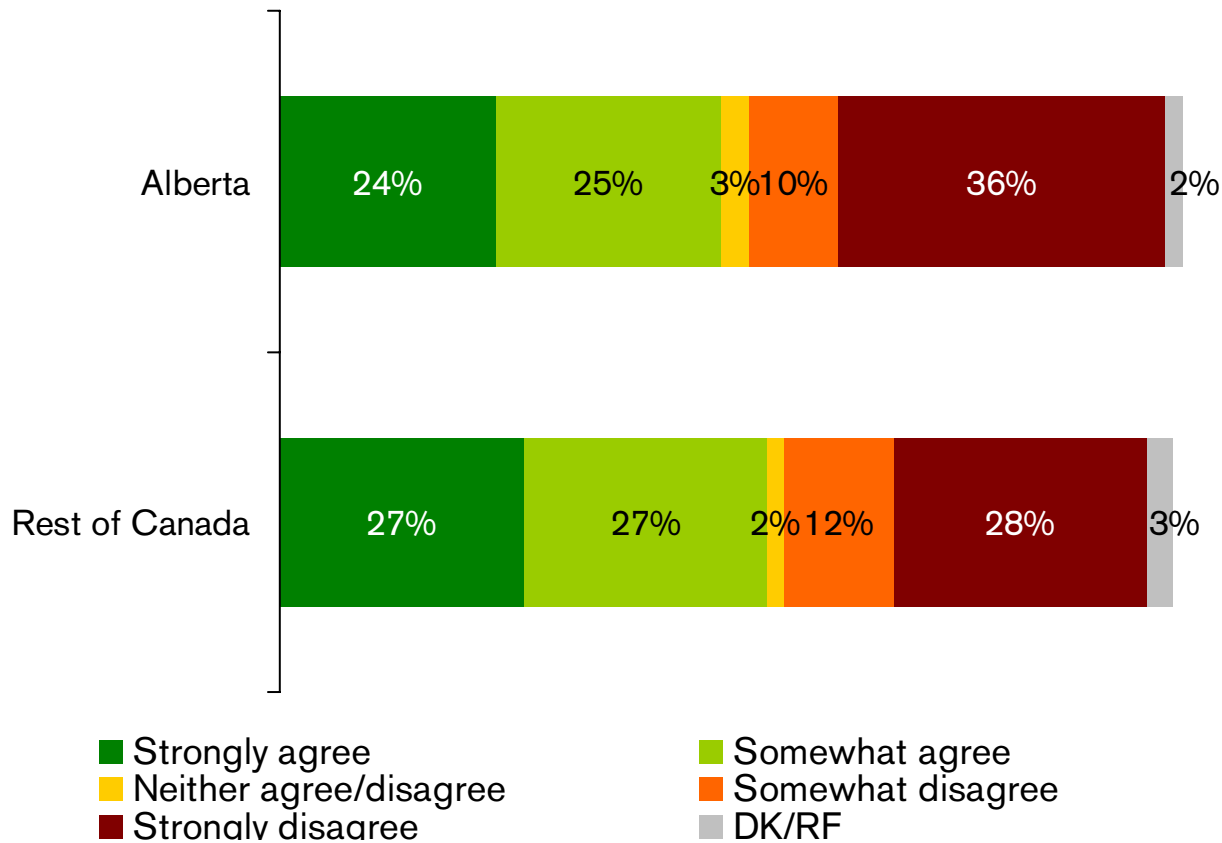
If the governments really wanted to curb greenhouse gas emissions, I think they could do it without delaying or cancelling oil sands projects



Canadians and Albertans divided on willingness to pay more to reduce GHG



I would gladly pay another 10 cents more a litre for gas if it meant it would help significantly reduce greenhouse gas emissions



'Strongly agree'

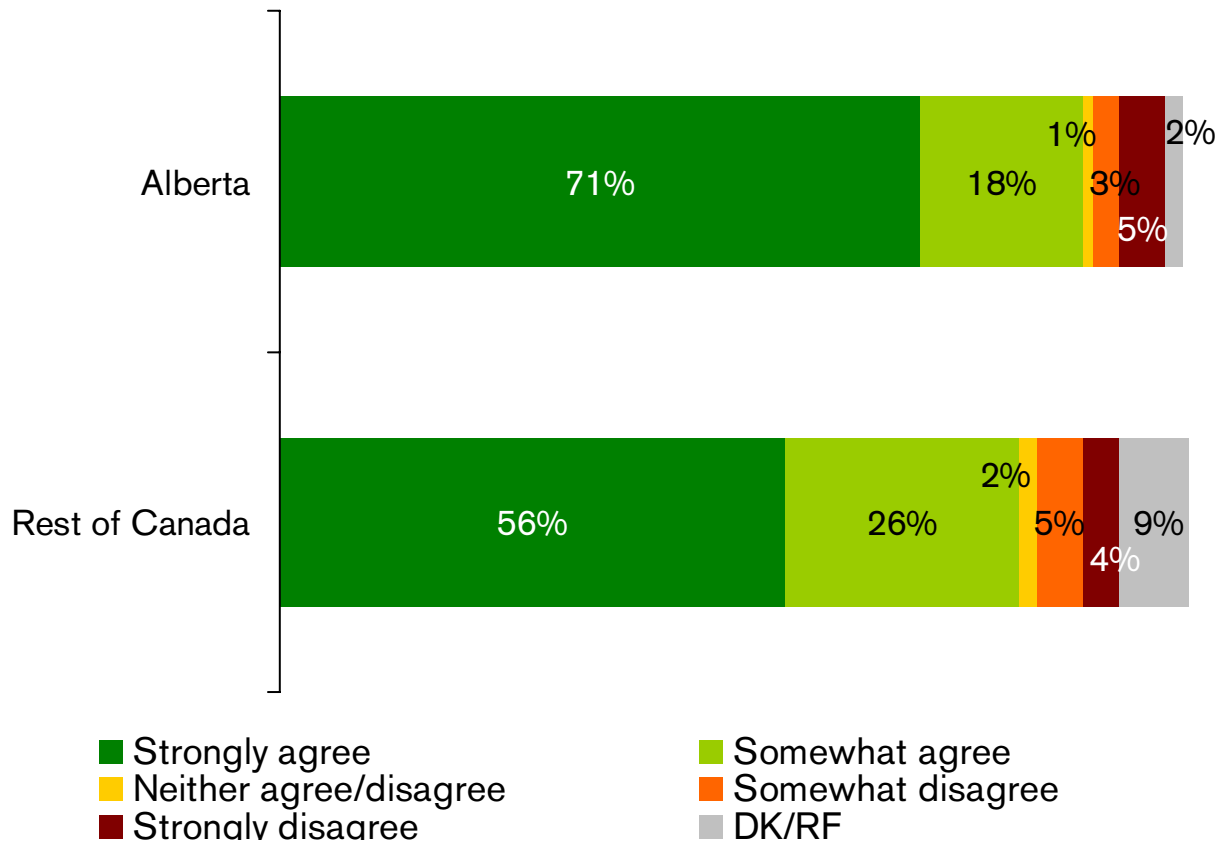
Alberta	24%
BC	15%
Ontario	33%
Quebec	23%
Other	28%
Calgary	22%
Edmonton	26%
Rest of AB	22%



Strong agreement that we should focus on technology to reduce oil sands impacts



We should focus on developing new technologies to reduce the environmental impact of the oil sands instead of trying to slow them down



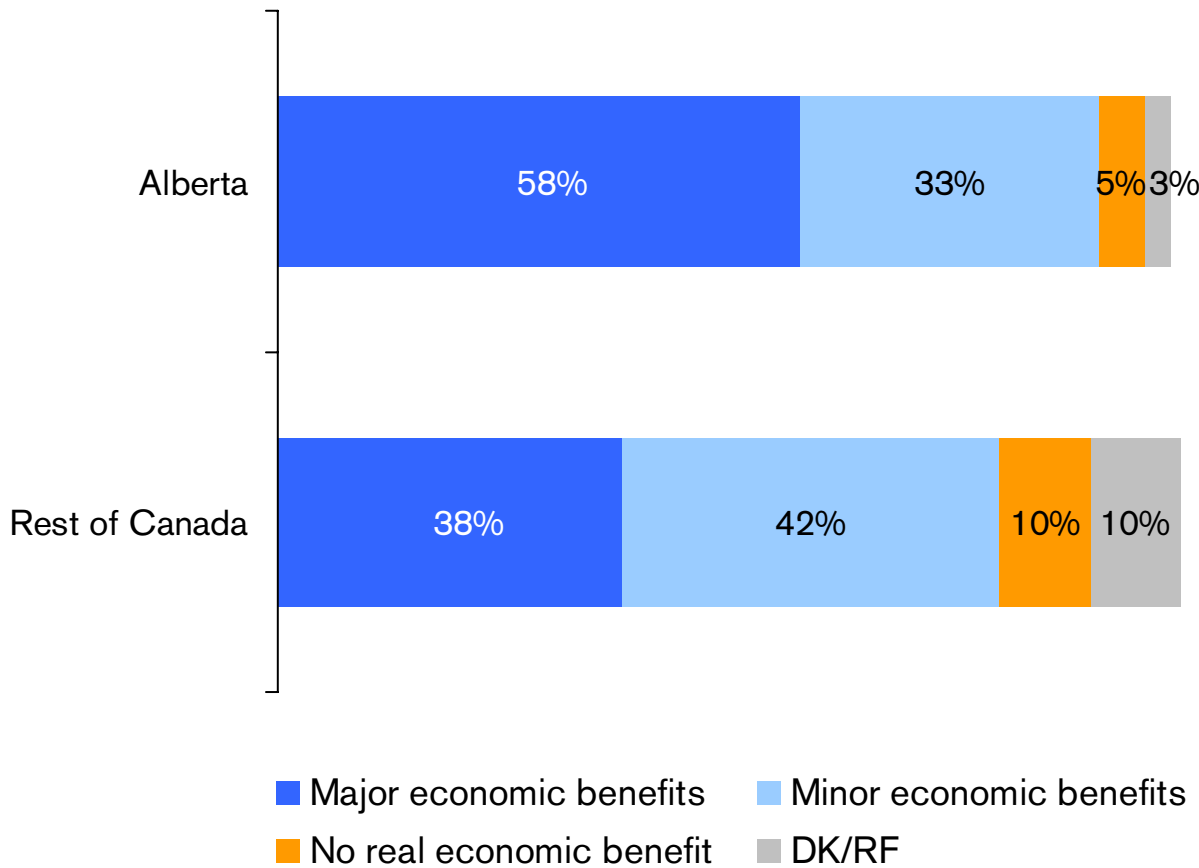
Economy



Majority of Albertans see major economic benefits to oil sands, Canadians less passionate



Thinking about Canada as a whole, do you think the development of the oil sands will create major economic benefits for Canada, minor economic benefits for Canada or no real economic benefits for Canada?



Those that respond 'Major benefits'

Alberta	<u>58%</u>
BC	42%
SK	57%
Ontario	39%
Quebec	33%
Other	38%

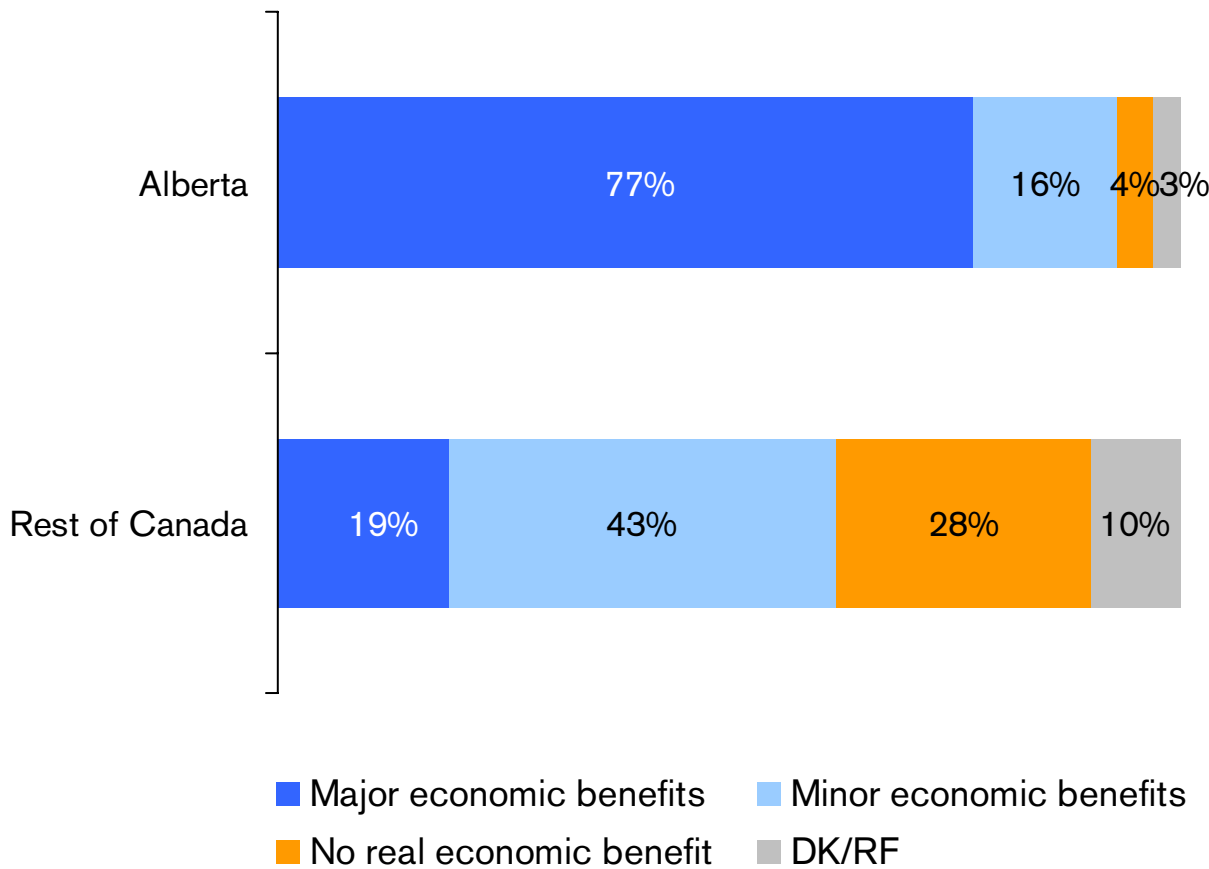
Men Work	<u>55%</u>
Men Not W	42%
Women NW	<u>29%</u>
Women W	32%



Large majority of Albertans see benefits for their province; other Canadians see minor benefits



Now, thinking about the province you live in, do you think the development of the oil sands will create major economic benefits for your province, minor economic benefits for your province or no real economic benefits for your province?



Those that respond 'Major benefits'

Alberta	77%
BC	19%
SK	66%
Ontario	16%
Quebec	17%
Other	20%

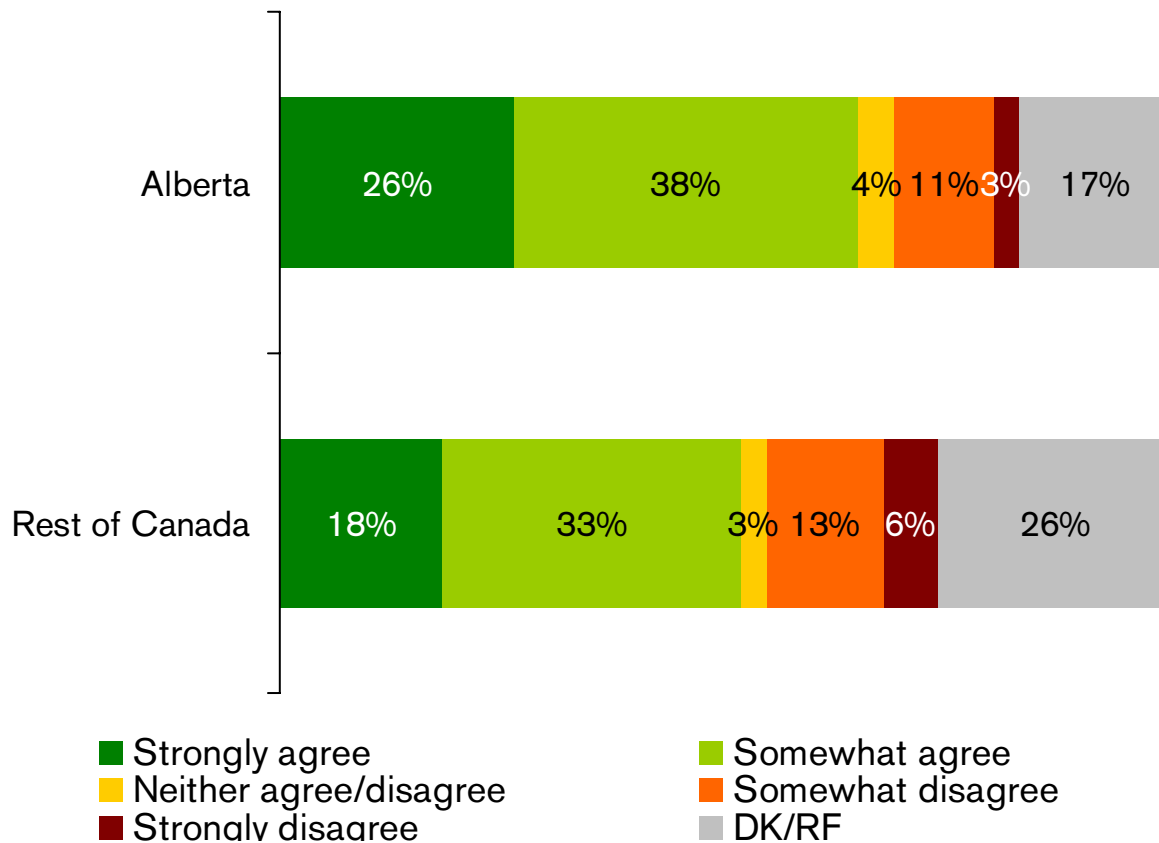
Men Work	30%
Men Not W	24%
Women NW	22%
Women W	21%



Most see benefits across Canada, but minority²⁰ uncertain



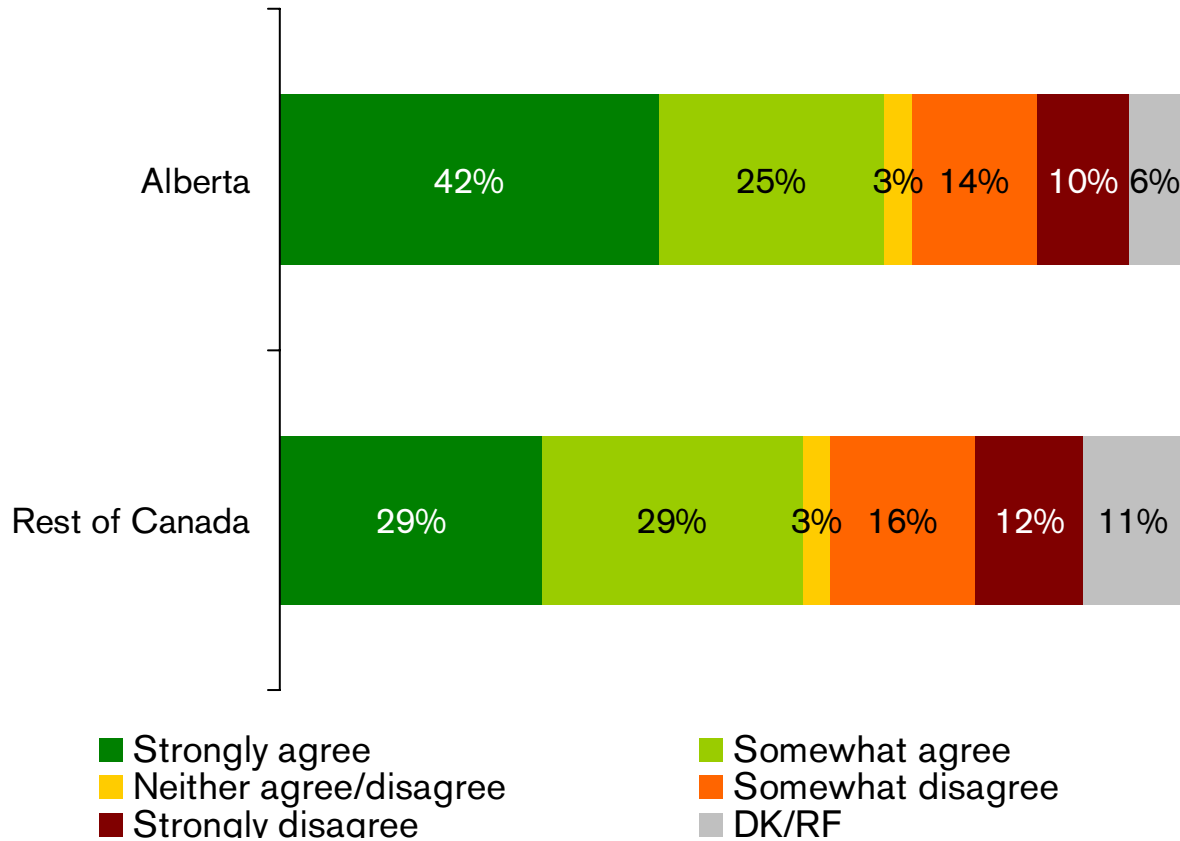
Companies all across Canada are providing goods and services that are needed to develop the oil sands.



Most in Alberta and Canadians think slowing down oil sands would be a mistake



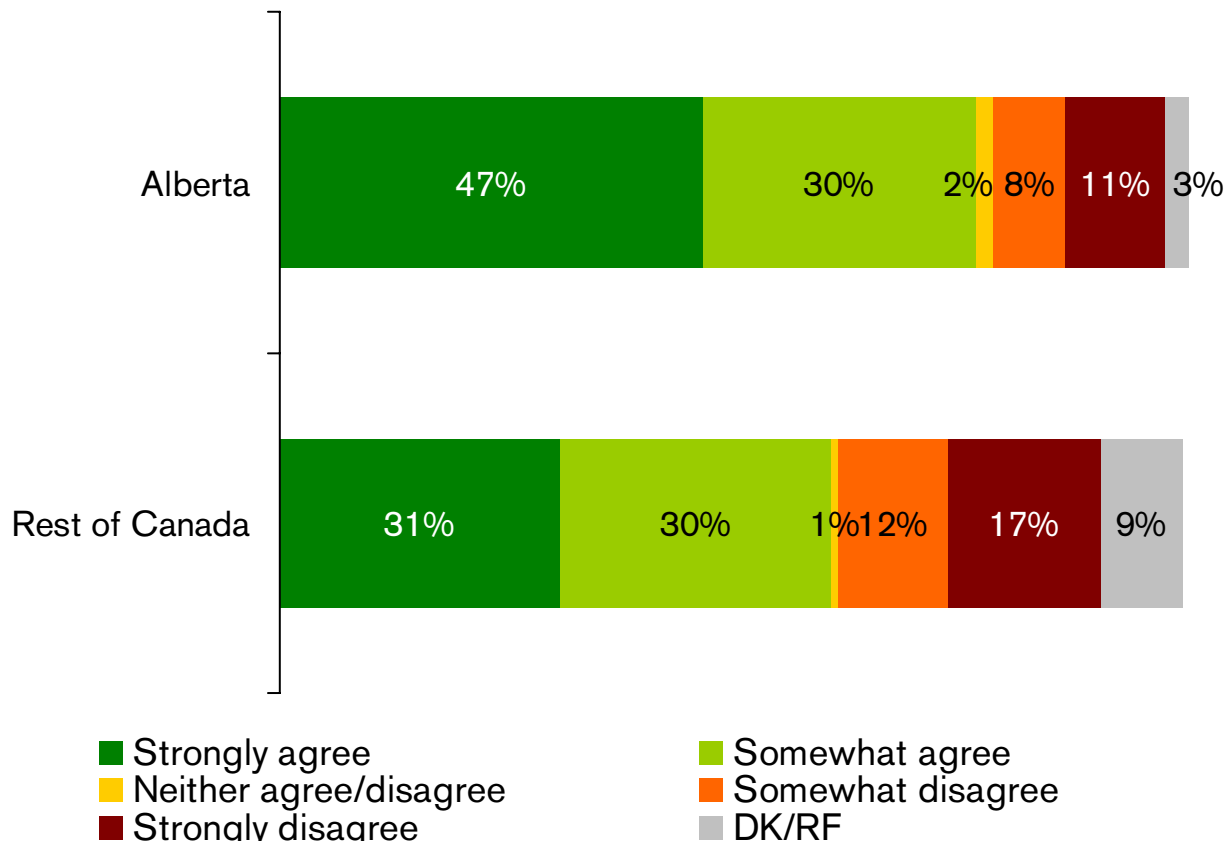
Given the current economic downturn, it would be a mistake to slow down the oil sands projects right now.



Most Albertans and Canadians agree we need oil money to fund social programs ²²



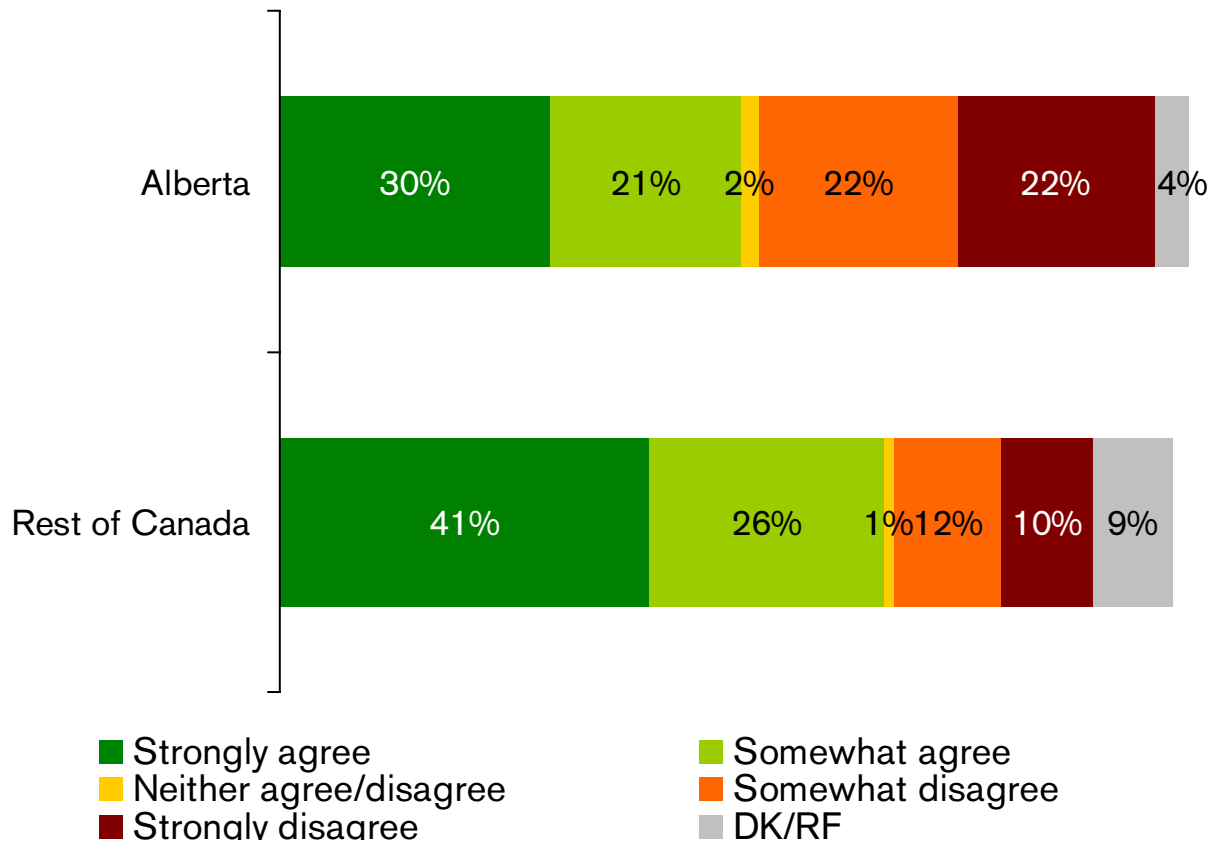
We need the revenues from the oil sands to help provide proper funding for social programs like health and education



Many are unsure they benefit from oil sands profits even in Alberta



Most of the profits from the oil sands don't benefit people like me



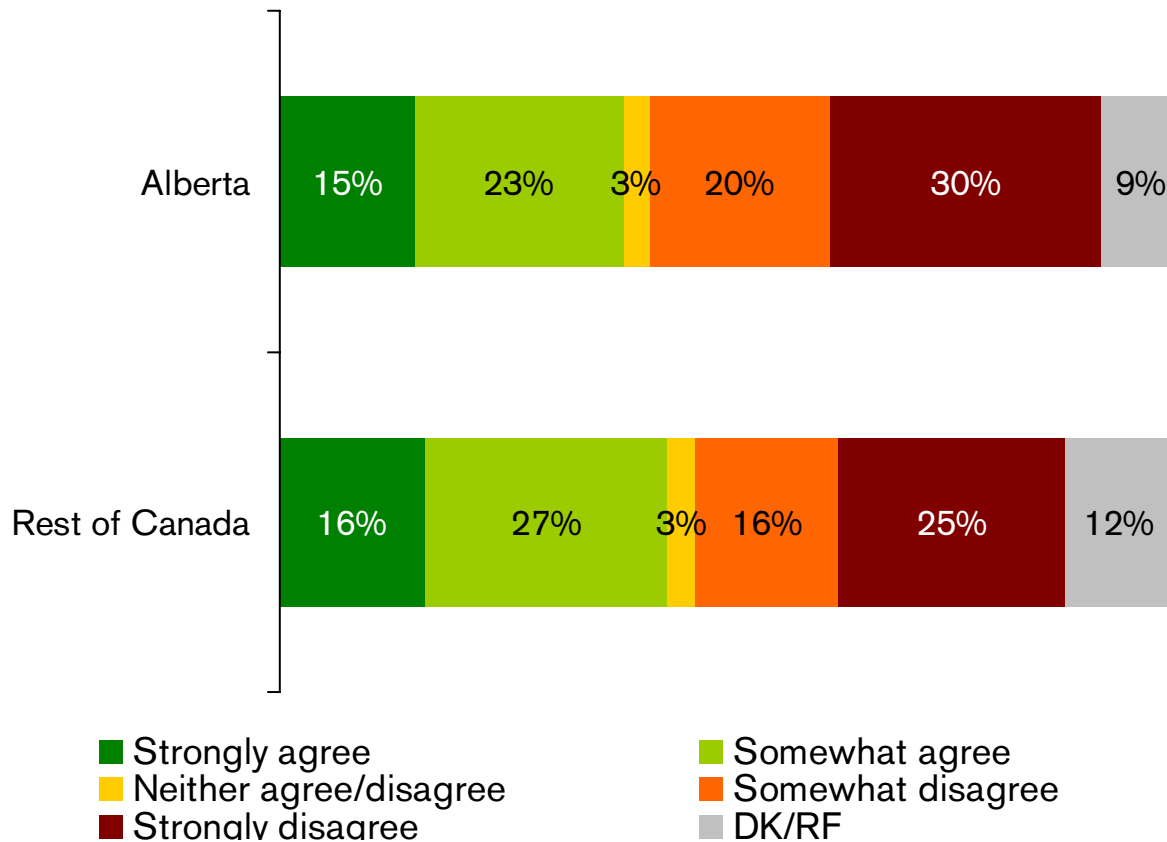
Gas prices



Canadians not convinced oil sands will make a difference to gas prices, especially Albertans



Developing Canada's oil sands will help keep gas prices down



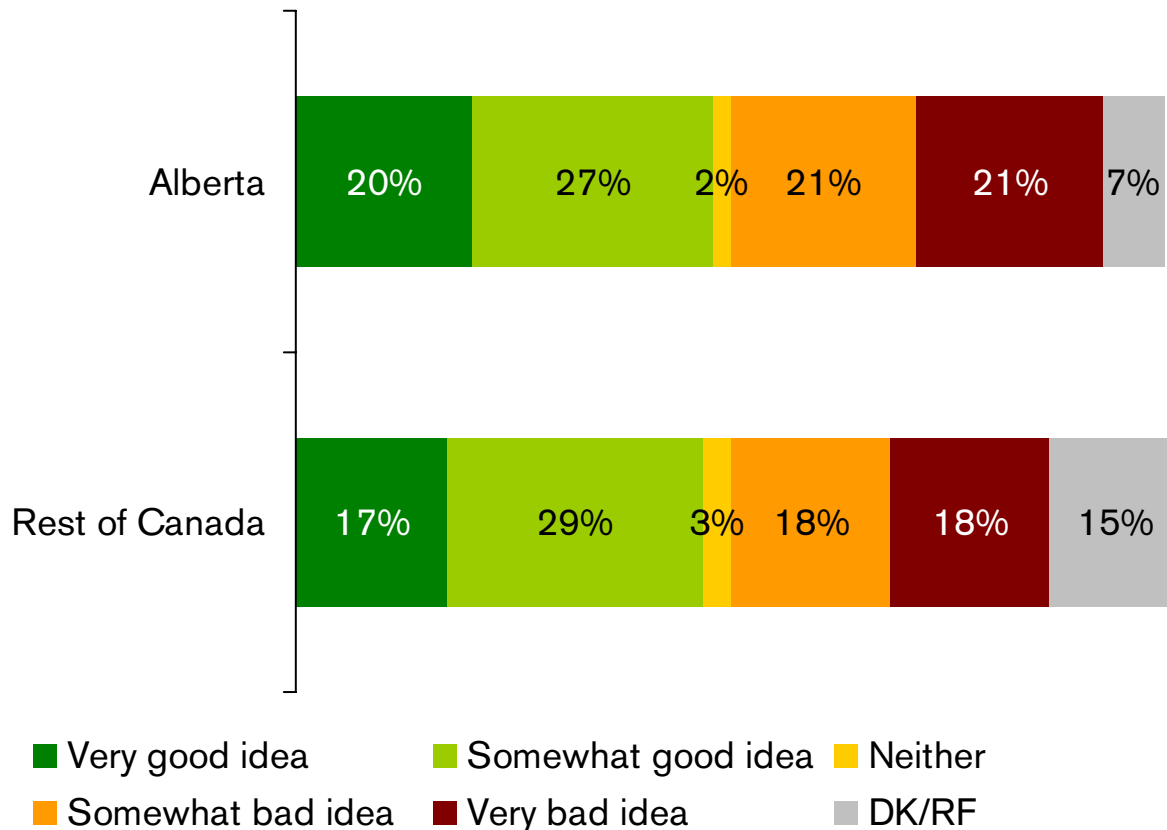
Cap and Trade vs. Capture and Storage



Canadians and Albertans unsure if Cap and Trade is a good idea...



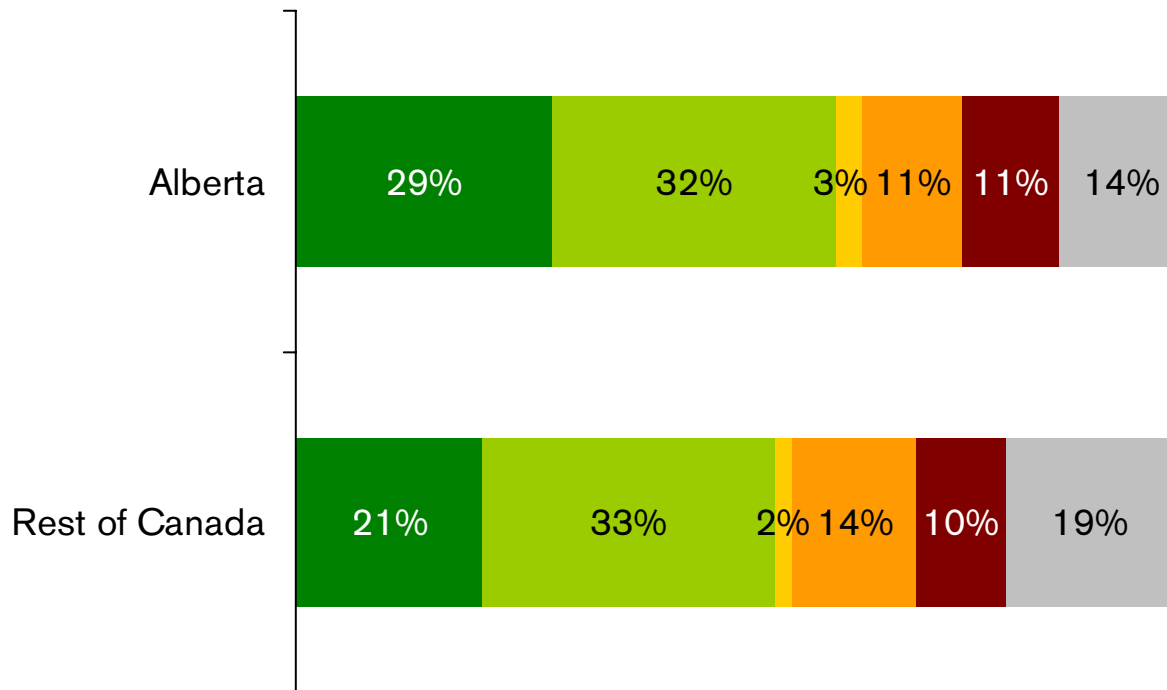
Cap and Trade is a system to manage carbon emissions where government would set a limit or cap on the total amount of greenhouse gas emissions industries can produce and then the companies can buy and sell those emissions among themselves. Does cap and trade sound like a good idea or a bad idea?



...while carbon capture and storage receives a ²⁸ more positive initial response



The Carbon Capture and Storage is a system to manage carbon emissions by capturing carbon dioxide from large emitters such as power plants and storing it either as a gas deep underground or in a solid form. Does Carbon Capture and Storage sound like a good idea or a bad idea?



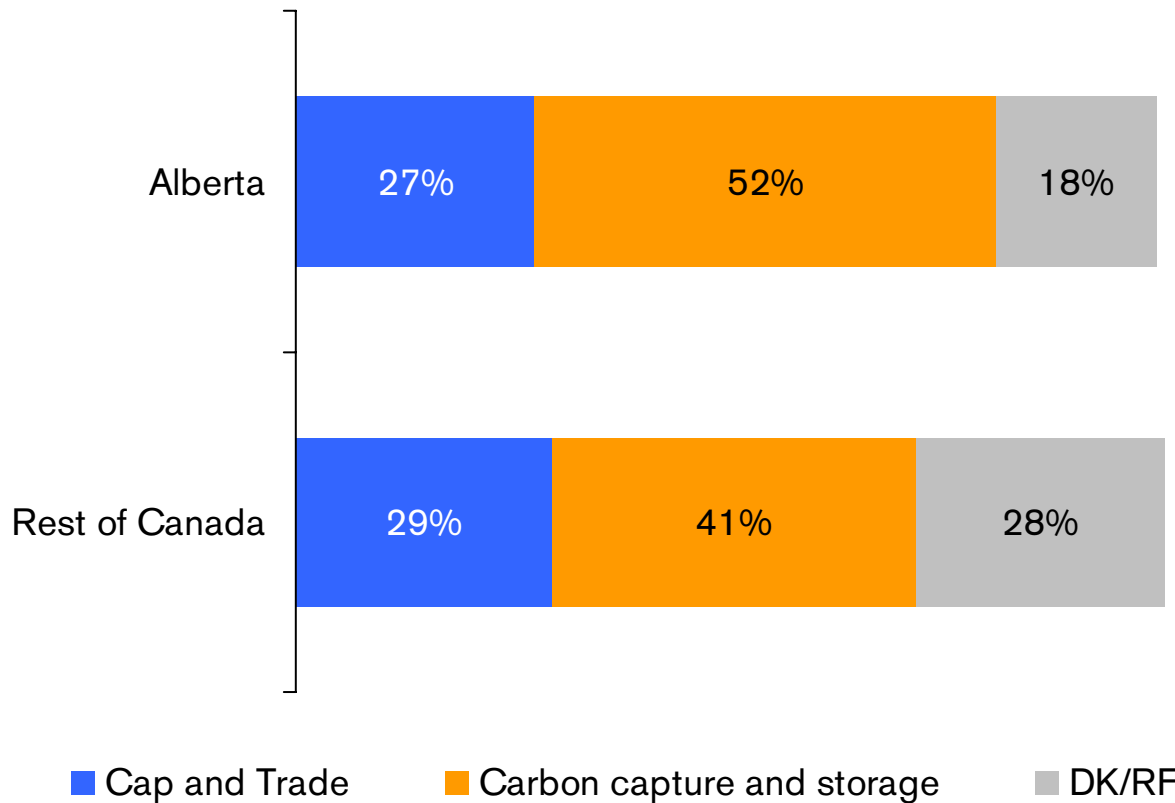
■ Very good idea ■ Somewhat good idea ■ Neither
■ Somewhat bad idea ■ Very bad idea ■ DK/RF



Carbon capture and storage is favourite over cap and trade



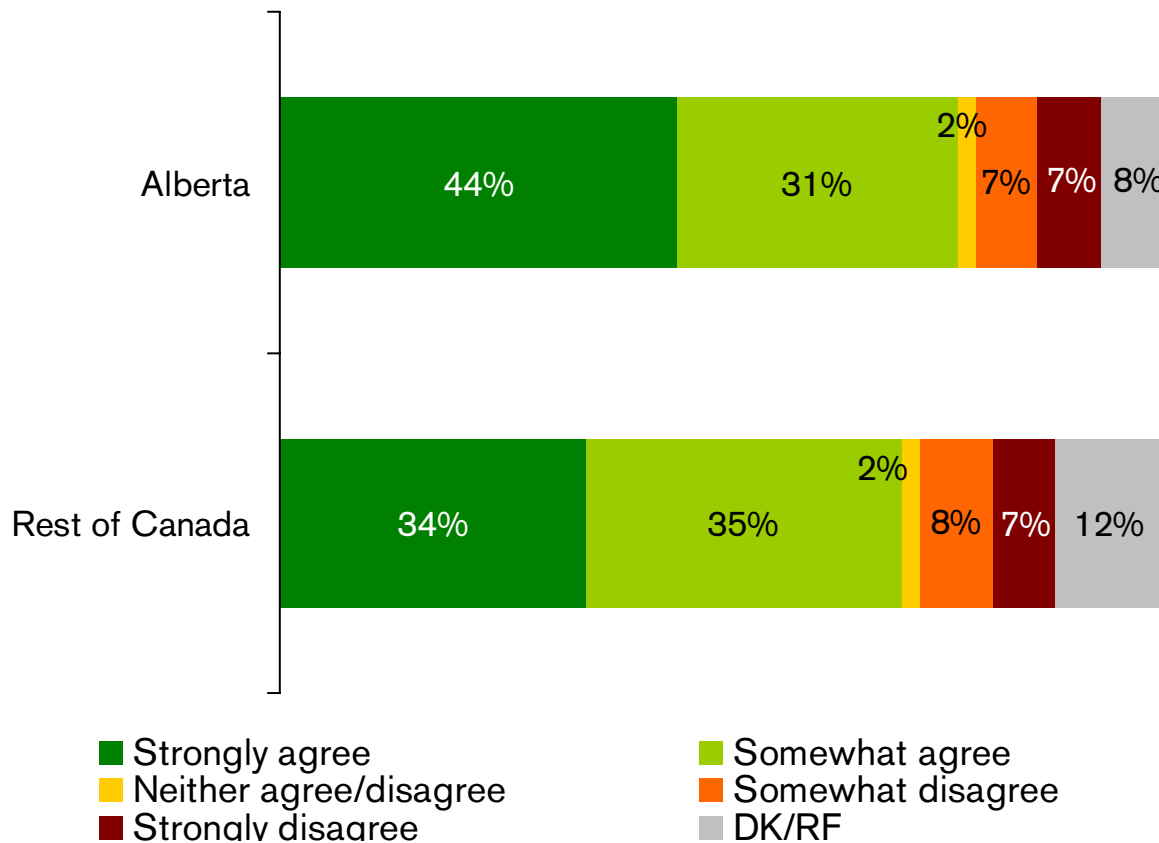
From what you have read, seen or heard, which approach to reducing greenhouse gases makes the most sense to you?



Potential to build global industry with carbon capture has strong appeal



I like the idea of pioneering the development of carbon capture and storage technology here in Canada because it will give us a new industry we can export to the world.



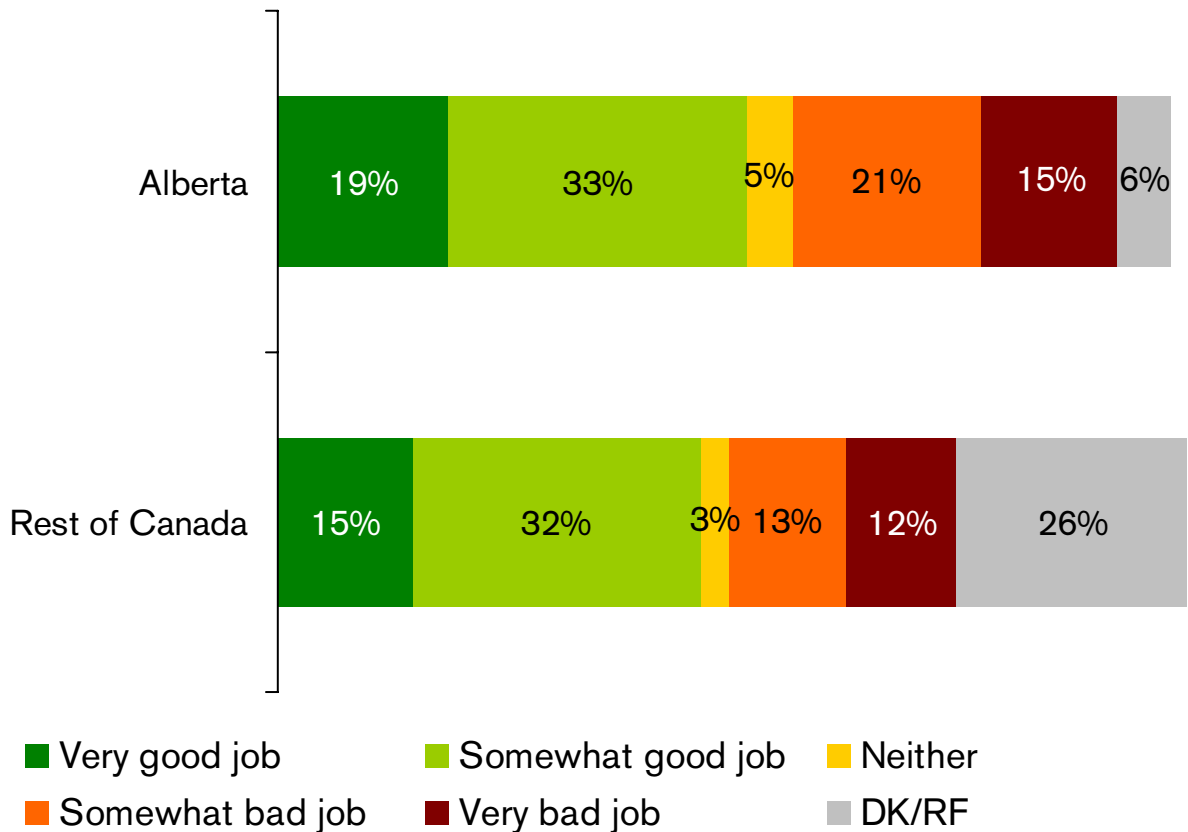
Federal Government vs. Alberta Government



Largest number say Alberta government has done a good job managing oil sands...



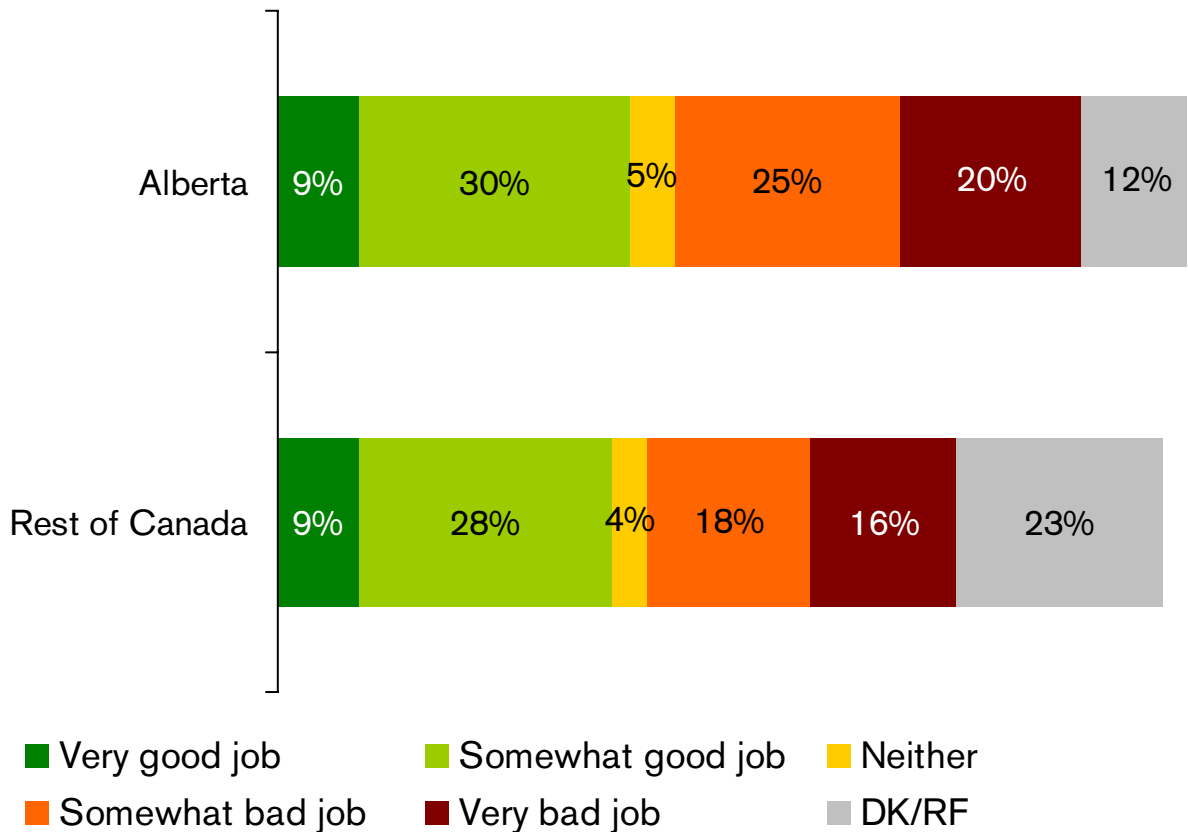
Most of the current oil sands developments are currently happening in Alberta . Overall, do you think the **Alberta government** has done a good job or a poor job of managing the oil sands development to date?



...but fewer say the federal government has done a good job



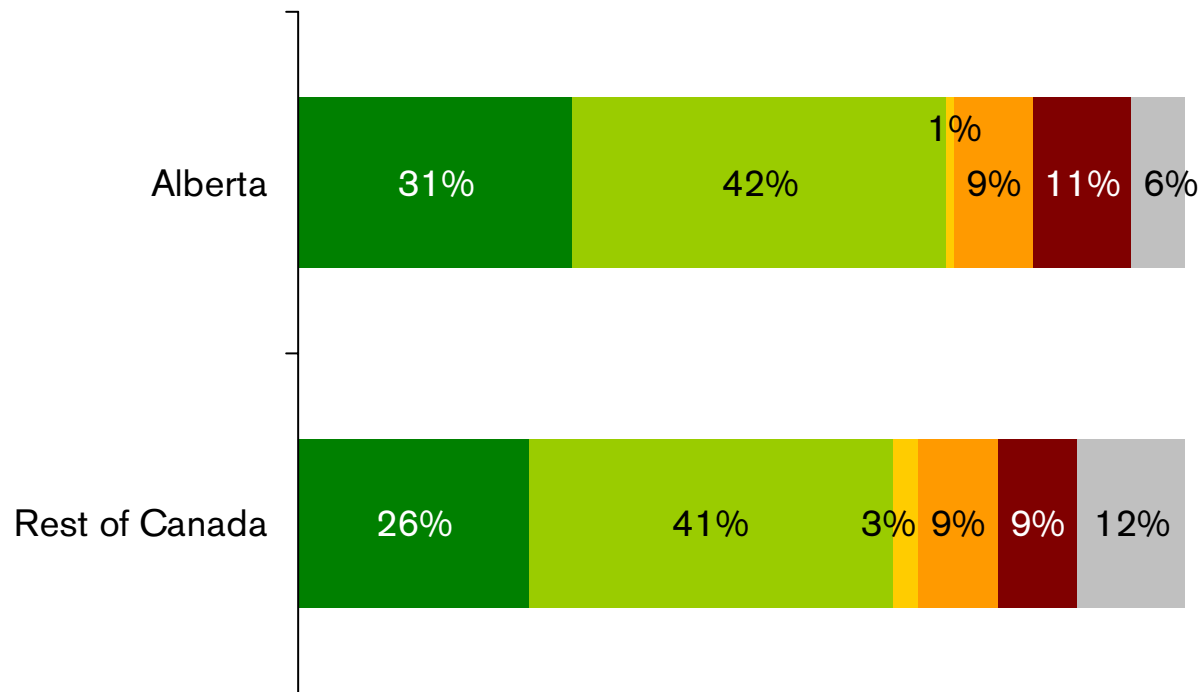
Overall, do you think the **federal government** has done a good job or a poor job of managing the oil sands development to date?



Albertans and Canadians agree Alberta's strategy sounds like a good idea



In September 2007, Alberta introduced a provincial climate change strategy. Under this plan, Alberta's major industries must reduce the intensity of their carbon emissions by 12 percent a year. They can do that either through direct reductions in their own emissions or by purchasing credits from other companies that have reduced their emissions or they can contribute to a fund that will be used for energy conservation and efficiency program and to finance research into new technologies for emission reductions. Does the Alberta climate change strategy sound like a good idea or a bad idea?



■ Very good idea
 ■ Somewhat good idea
 ■ Neither
■ Somewhat bad idea
 ■ Very bad idea
 ■ DK/RF



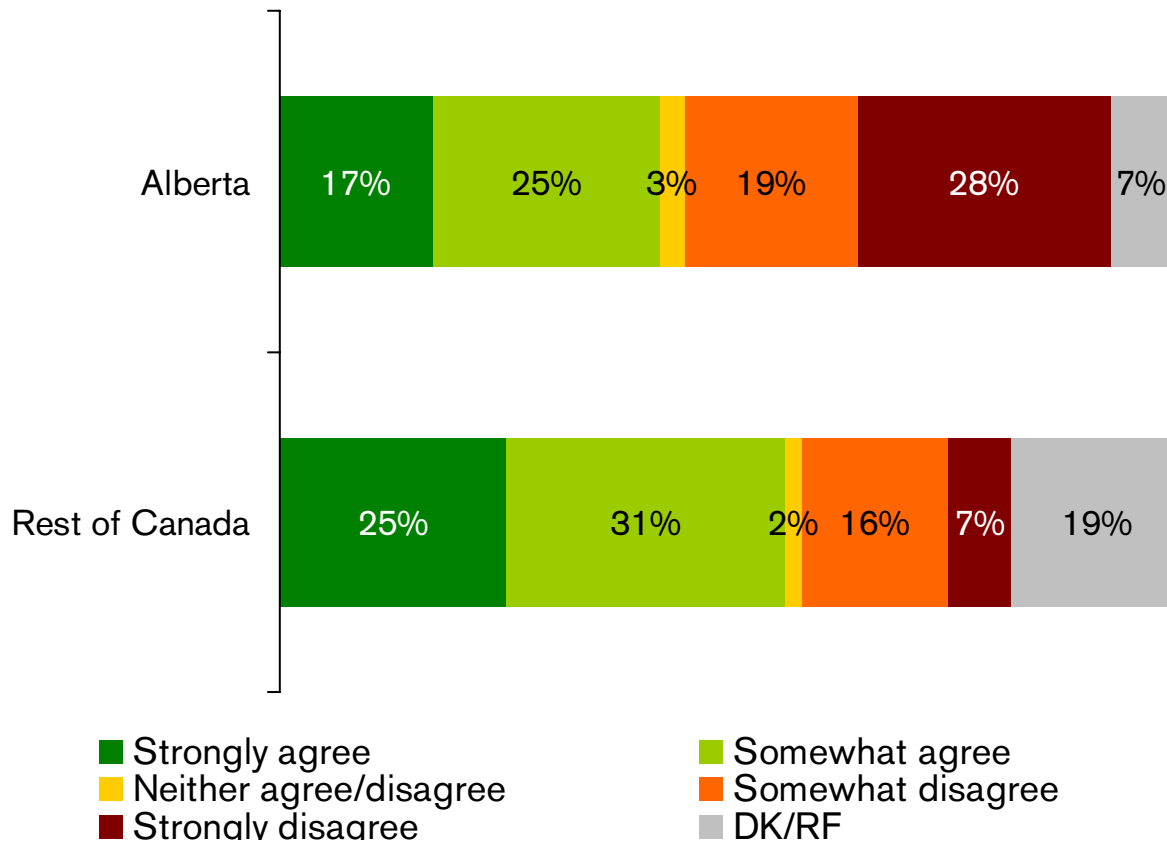
Can you tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements about oil sands projects?



Outside Alberta, Canadians are more likely to want the federal government to step in



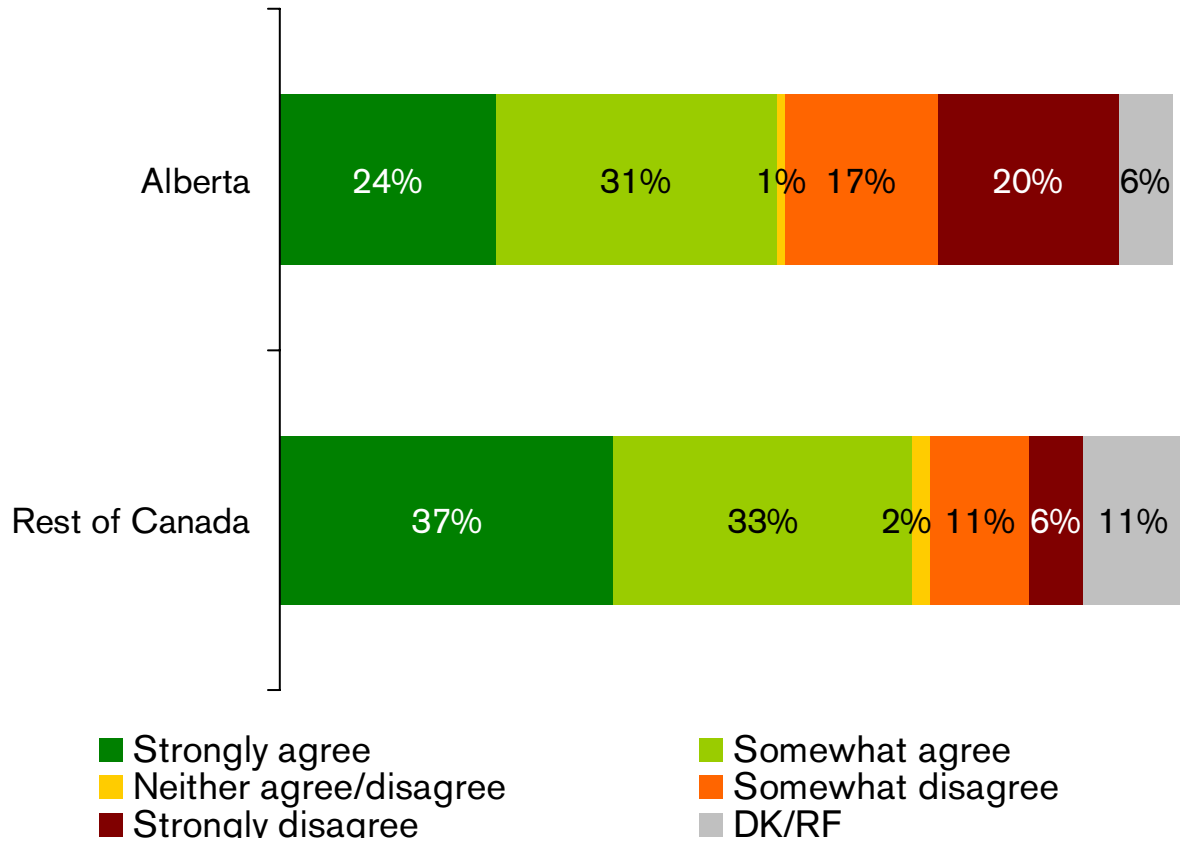
When it comes to the oil sands, the Alberta government has failed to adequately protect the environment and the federal government needs to step in



Even in Alberta, Canadians see a significant role for the federal government



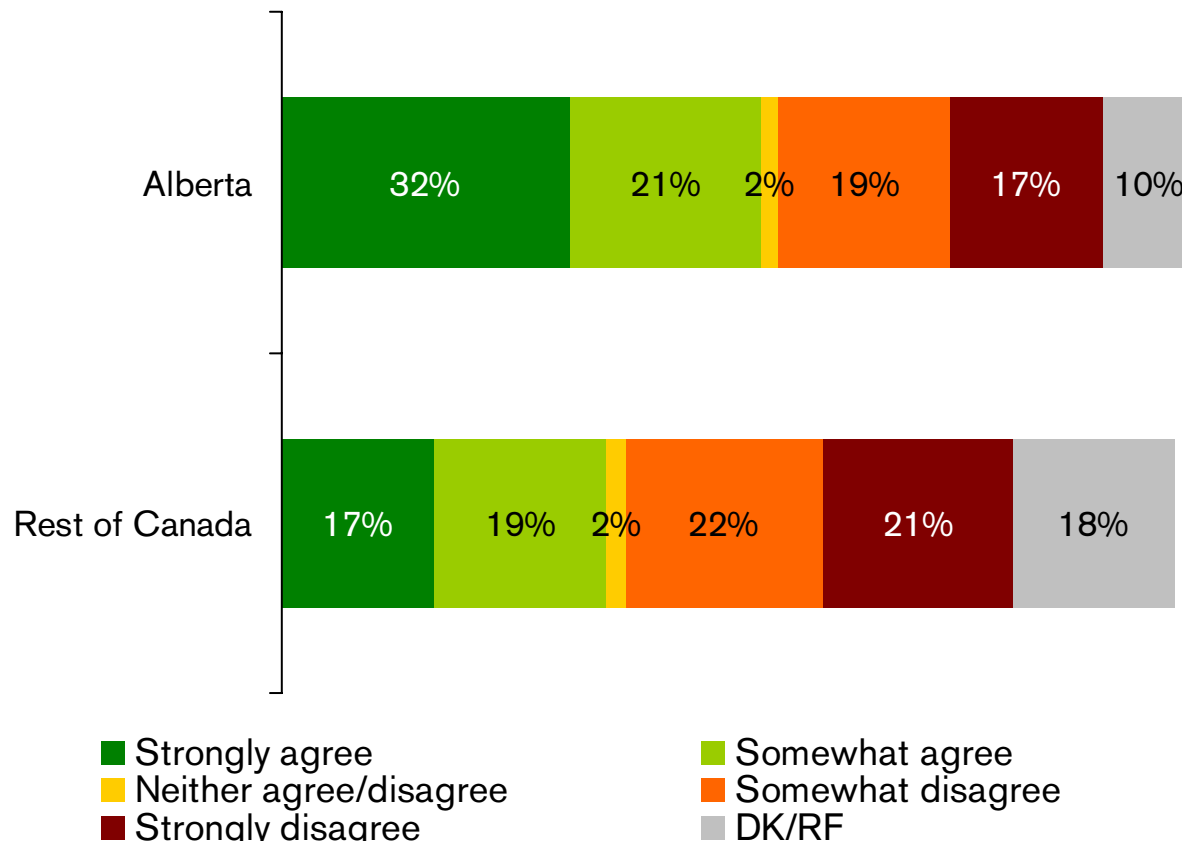
It doesn't matter what the Alberta government is doing, the oil sands projects have such a big impact on the environment the federal government simply has to play a significant role in regulating them



NEP echoes in Alberta



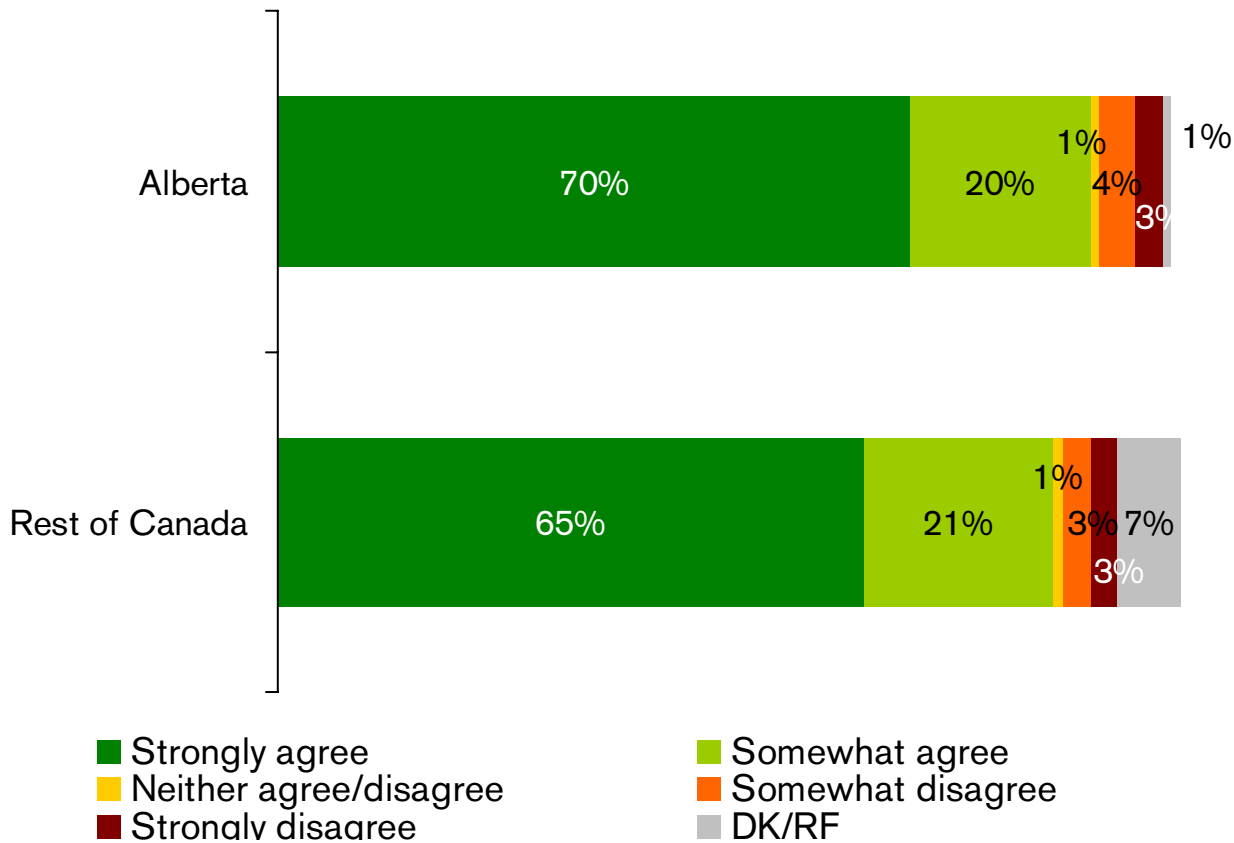
The federal government made such a mess of the oil business when it interfered back in the 80s that it should stop interfering and just stay out of the way



Overwhelming agreement that oil sands revenue³⁹ should help reducing oil sands impacts

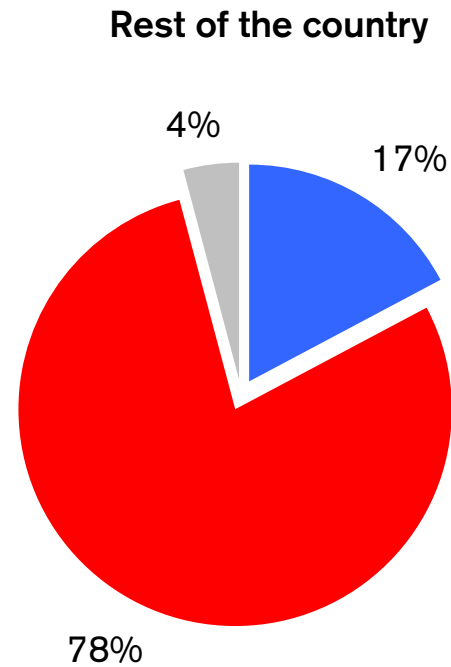
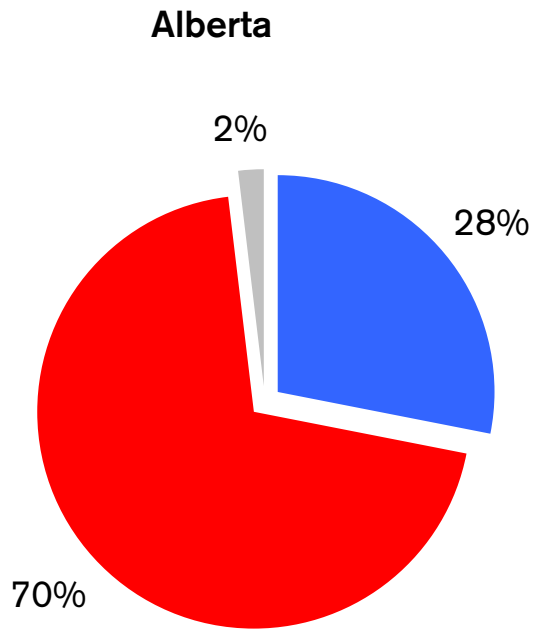


Governments that receive revenues from the oil sands should commit some of that money to reducing the environmental and social impact of the oil sands



Even Albertans are mostly unaware of the 41% of taxes the federal government receives

Q Have you heard that the federal government receives 41% of the taxes generated by the oil sands?



■ Yes

■ No

■ DK/RF

■ Yes

■ No

■ DK/RF

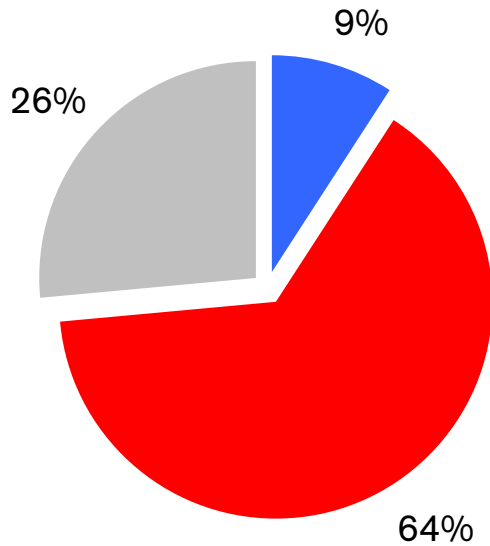


Albertans and other Canadians unaware of any federal oil money re-invested in Alberta



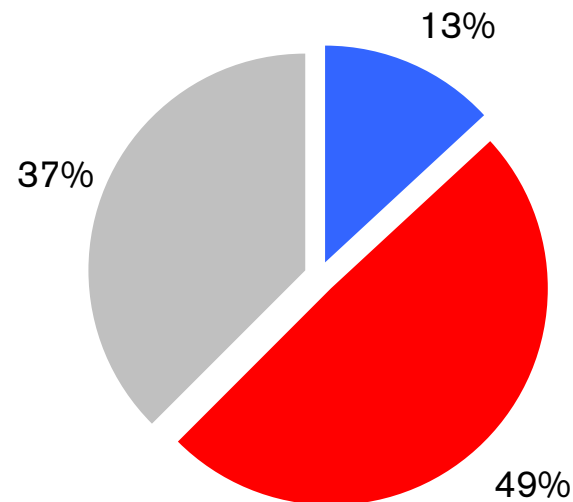
From what you have read, seen or heard, is the federal government investing any of the money it receives from the oil sands back in Alberta to reduce any environmental or social impacts of the oil sands?

Alberta



■ Yes ■ No ■ DK/RF

Rest of the country



■ Yes ■ No ■ DK/RF



Pulling It All Together

- Alberta's image is competitive with other provinces in Canada but environment showing cause for concern.
- The Oil Sands are generally well-regarded by Canadians
 - Economic dimension is key although many outside Alberta are not sure of local benefit
 - A minority feel strongly about the potential gas price benefit
- Technology is seen to have the potential to save the day
 - Allows oil sands to proceed without slow down
 - Could allow Canada to build global industry
- Federal government is vulnerable for taking oil sands revenue without visibly investing in social and environmental offsets.

