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**GLOBEANDMAIL**

A Report to
The Globe and Mail

**Views Towards Oil Sands
Development**

January 24, 2008

Introduction and Methodology

- ◆ *The Strategic Counsel* is pleased to present findings of a survey of 500 Canadians. Results are based on a proportionate national sample of Canadians 18 years of age or older.
- ◆ Interviews were conducted between January 22nd and January 23rd, 2008.
- ◆ *The Strategic Counsel* is pleased to present findings of a survey of 914 Albertans.
 - Proportionate provincial sample n=800
 - Oversample Southern Alberta n=38
 - Oversample Northern Alberta n=76
- ◆ The results are have been weighted by age and region to be proportionate to a sample of 800 Albertans, 18 years of age or older.
- ◆ Interviews were conducted between January 10th and January 13th, 2008.
- ◆ The following table outlines the sample distribution and associated margin of error.
- ◆ Note: Proportions may not sum to 100% due to rounding.

Sample Distribution and Margin of Error

	January 22-23, 2008	
Sample Regions	Sample Size	Margin of Error (±)
CANADA	500	4.4%
	January 10-13, 2008	
ALBERTA	800	3.5%
Southern Alberta <i>(including Red Deer and excluding Calgary)</i>	200	6.9%
Calgary CMA	262	6.1%
Edmonton CMA	252	6.2%
Northern Alberta <i>(North of Red Deer and excluding Edmonton)</i>	200	6.9%

How do Albertans describe their quality of life?

	ALBERTA	Region			
		South	Calgary	Edmonton	North
	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	800	200	262	252	200
	%	%	%	%	%
Total Excellent/Good	76	80	77	75	70
Excellent	27	39	24	23	26
Good	49	41	53	52	44
Fair	19	18	18	20	24
Poor	4	2	4	4	5
Very Poor	1	<1	1	1	2
Total Very Poor/Poor	5	2	5	5	7
DK/NA/Ref	<1	-	<1	1	-

Q. Overall, how would you describe the quality of life in your province, Alberta? Would you say that it is excellent, good, fair, poor or very poor?
 Base: Total sample

Do Albertans think their quality of life has improved?

	ALBERTA	Region			
		South	Calgary	Edmonton	North
	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	800	200	262	252	200
	%	%	%	%	%
Improved	26	26	24	29	27
Stayed about the same	38	45	32	38	46
Gone down	32	24	41	30	24
DK/NA/Ref	4	6	3	4	3

Q. And has this quality of life improved, stayed about the same, or gone down in the last five years?

Base: Total sample

Has the pace of economic development in Alberta been too fast?

	CANADA	ALBERTA	Region			
			South	Calgary	Edmonton	North
			Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
	Jan 22-23	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Too fast	41 (52)	62	59	64	63	61
About right	36 (45)	32	35	30	33	29
Too slow	2 (3)	4	3	4	3	8
DK/NA/Ref	21	2	3	3	<1	3

Q. Thinking about the pace of economic development in Alberta, would you personally say that the pace has been too fast, about right, or too slow?

Base: Total sample

Note: Numbers in brackets represent percentage excluding don't know/no answer responses.

Have the oil sands been a good thing for Alberta?

	CANADA	ALBERTA	Region			
			South	Calgary	Edmonton	North
	Jan 22-23	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Total GOOD THING	79	83	86	83	83	76
Very good thing	44	39	39	41	38	34
Somewhat of a good thing	35	44	47	42	45	42
Both/neither (volunteered)	4	4	3	3	6	3
Somewhat of a bad thing	5	10	8	10	8	13
Very bad thing	4	2	2	2	2	5
Total BAD THING	9	12	10	12	10	18
DK/NA/Ref	8	1	1	2	<1	3

Q. As you know, one of the main factors creating economic growth in the province has been the oil sands projects. In thinking about the development of the oil sands do you feel that, overall, this has been a good thing or a bad thing for Alberta? Is that very or somewhat?

Base: Total sample

Have the oil sands been a good thing for Canada?

	CANADA
	Jan 22-23
n=	500
	%
Total GOOD THING	79
Very good thing	41
Somewhat of a good thing	38
Both/neither (volunteered)	4
Somewhat of a bad thing	8
Very bad thing	5
Total BAD THING	13
DK/NA/Ref	4

Q. And thinking about the development of the oil sands do you feel that, overall, this has been a good thing or a bad thing for Canada? Is that very or somewhat?
 Base: Total sample

Has oil sands development been too fast?

	CANADA Jan 22-23	ALBERTA Jan 10-13	Region			
			South Jan 10-13	Calgary Jan 10-13	Edmonton Jan 10-13	North Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Too fast	24	43	36	42	45	51
About right	52	48	52	50	47	41
Too slow	8	5	8	5	5	5
DK/NA/Ref	16	4	5	3	4	3

Q. And do you think oil sands development has been too fast, about right, or too slow?
 Base: Total sample

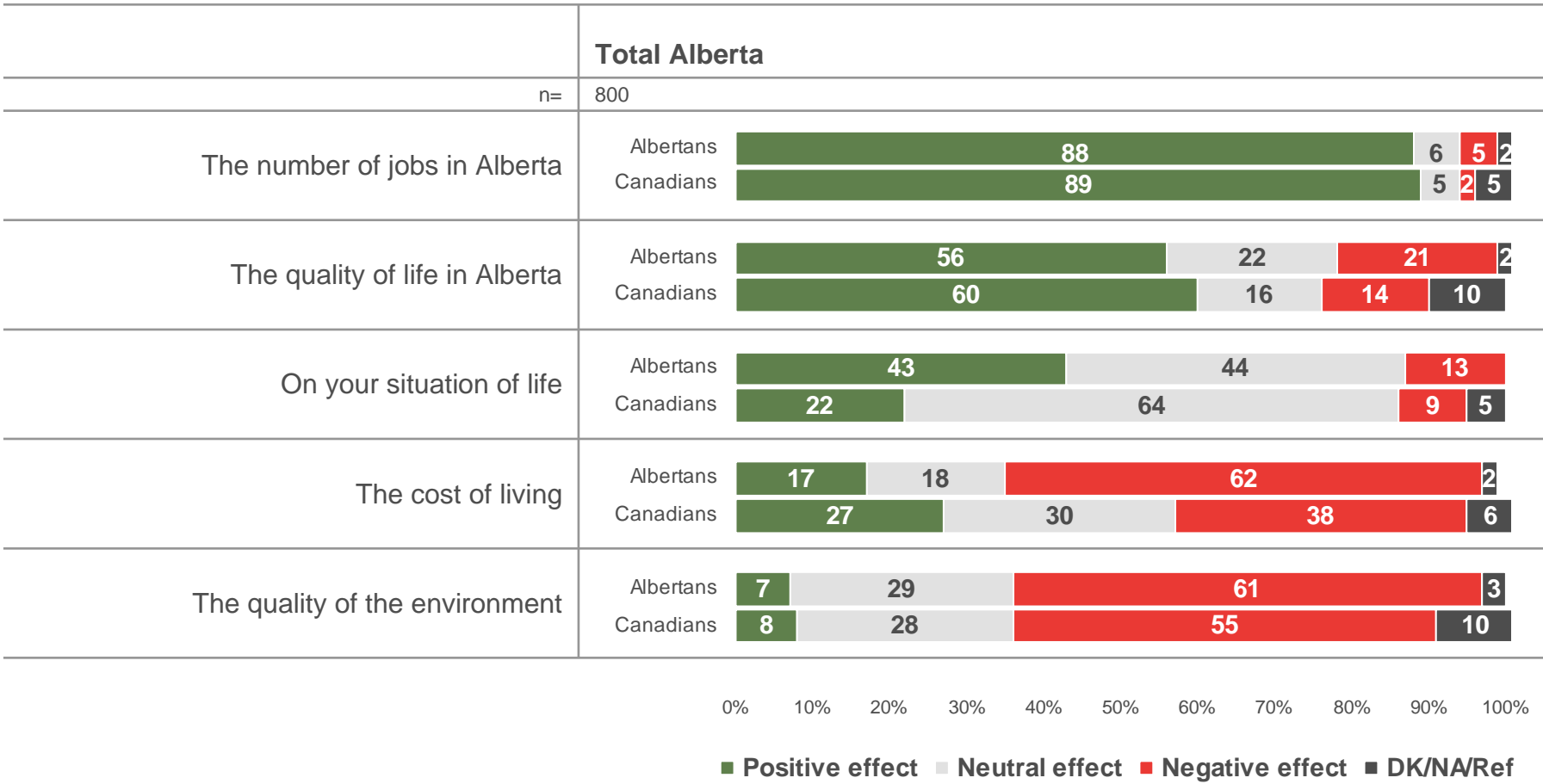
Should there be limits on the pace of oil sands development?

	CANADA	ALBERTA	Region			
			South	Calgary	Edmonton	North
			Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
	Jan 22-23	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
In order to manage the pace of development better only one big project at a time should be allowed.	57	57	54	54	62	58
It is important to create as much economic development as possible and to place no limits on how quickly the oil sands should be developed.	33	33	35	37	28	33
DK/NA/Ref	10	9	11	8	10	9

Q. There has been some discussion about the pace at which the oil sands should be developed. Some people say that in order to manage the pace of development better only one big project at a time should be allowed. Other people say that it is important to create as much economic development as possible and to place no limits on how quickly the oil sands should be developed. Thinking of these two points of view, which one best reflects your own?

Base: Total sample

Has oil sands development had a positive effect on...?



Q. For each of the following, can you please tell me whether you think the oil sands have had a positive, negative, or neutral effect. The first is on... (READ AND ROTATE)

Base: Total sample

Has oil sands development had a positive effect on...?

“The number of jobs in Alberta”

	CANADA	ALBERTA	Region			
			South	Calgary	Edmonton	North
	Jan 22-23	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Positive effect	89	88	90	90	86	83
Neutral effect	5	6	4	5	8	7
Negative effect	2	5	4	4	5	9
DK/NA/Ref	5	2	1	2	2	2

Q. For each of the following, can you please tell me whether you think the oil sands have had a positive, negative, or neutral effect. The first is on... (READ AND ROTATE)

Base: Total sample

Has oil sands development had a positive effect on...?

“The quality of life in Alberta”

	CANADA	ALBERTA	Region			
			South	Calgary	Edmonton	North
	Jan 22-23	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Positive effect	60	56	56	53	58	56
Neutral effect	16	22	20	26	20	23
Negative effect	14	21	22	19	21	20
DK/NA/Ref	10	2	2	2	1	1

Q. For each of the following, can you please tell me whether you think the oil sands have had a positive, negative, or neutral effect. The first is on... (READ AND ROTATE)

Base: Total sample

Has oil sands development had a positive effect on...?

“On your situation and life”

	CANADA	ALBERTA	Region			
			South	Calgary	Edmonton	North
	Jan 22-23	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Positive effect	22	43	42	46	43	38
Neutral effect	64	44	46	42	43	43
Negative effect	9	13	11	10	13	18
DK/NA/Ref	5	1	<1	2	1	2

Q. For each of the following, can you please tell me whether you think the oil sands have had a positive, negative, or neutral effect. The first is on... (READ AND ROTATE)

Base: Total sample

Has oil sands development had a positive effect on...?

“The cost of living”

	CANADA	ALBERTA	Region			
			South	Calgary	Edmonton	North
	Jan 22-23	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Positive effect	27	17	21	15	18	19
Neutral effect	30	18	22	17	18	16
Negative effect	38	62	53	66	64	63
DK/NA/Ref	6	2	5	2	<1	2

Q. For each of the following, can you please tell me whether you think the oil sands have had a positive, negative, or neutral effect. The first is on... (READ AND ROTATE)

Base: Total sample

Has oil sands development had a positive effect on...?

“The quality of the environment”

	CANADA	ALBERTA	Region			
			South	Calgary	Edmonton	North
	Jan 22-23	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Positive effect	8	7	8	7	6	10
Neutral effect	28	29	35	26	28	26
Negative effect	55	61	53	63	63	61
DK/NA/Ref	10	3	4	4	2	3

Q. For each of the following, can you please tell me whether you think the oil sands have had a positive, negative, or neutral effect. The first is on... (READ AND ROTATE)

Base: Total sample

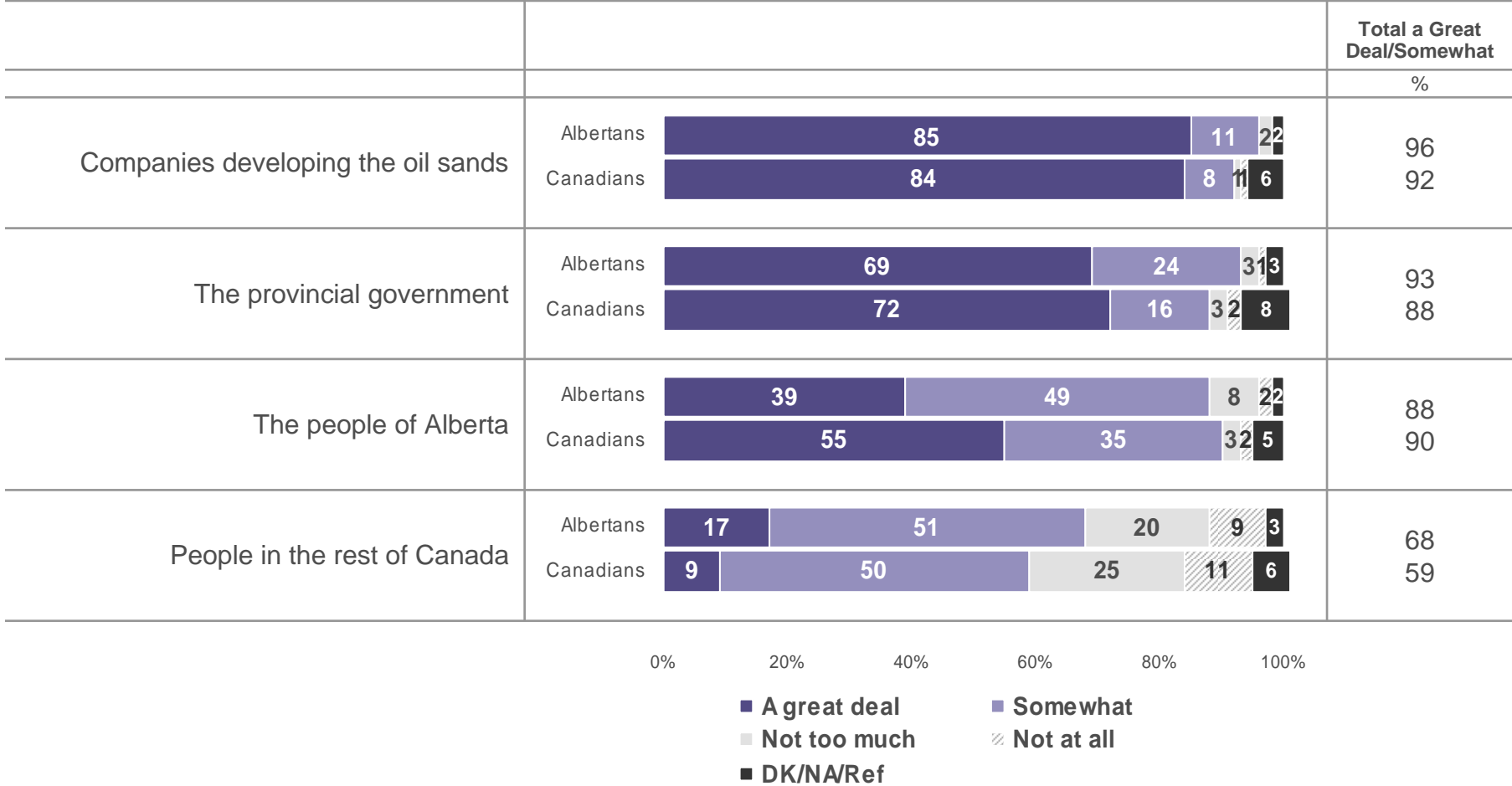
Should there be a more stringent approval process for oil sands development projects?

	CANADA	ALBERTA	Region			
			South	Calgary	Edmonton	North
	Jan 22-23	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
The projects are so big and can have such a large impact on the province that the approval process must be much more stringent and take into account things like economic and environmental impacts much more than they do now.	64	62	58	64	63	61
The approval process should be left as is, since if it is more stringent this will slow the pace of development and will hurt the overall economic growth of the province.	27	31	34	29	30	32
DK/NA/Ref	9	7	8	7	7	7

Q. In thinking about the oil sands development, some people have said that the projects are so big and can have such a large impact on the province that the approval process must be much more stringent and take into account things like economic and environmental impacts much more than they do now. Other people say that the approval process should be left as is, since if it is more stringent this will slow the pace of development and will hurt the overall economic growth of the province. Thinking of these two points of view, which one best reflects your own?

Base: Total sample

How much have each of the following benefited from the development of the oil sands...?



Q. And now for the following, please tell me how much you feel each has benefited from the development of the oil sands; that is have they benefited a great deal, somewhat, not too much of not at all? The first is...

Base: Total sample

How much have each of the following benefited from the development of the oil sands...?

“Companies developing the oil sands”

	CANADA	ALBERTA	Region			
			South	Calgary	Edmonton	North
	Jan 22-23	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Total A Great Deal/Somewhat	92	96	97	95	96	95
A great deal	84	85	88	87	84	79
Somewhat	8	11	9	8	12	16
Not too much	1	2	-	2	2	1
Not at all	1	<1	-	1	1	1
Total Not Too Much/Not At All	2	2	-	3	3	2
DK/NA/Ref	6	2	3	2	1	3

Q. And now for the following, please tell me how much you feel each has benefited from the development of the oil sands; that is have they benefited a great deal, somewhat, not too much of not at all? The first is...

Base: Total sample

How much have each of the following benefited from the development of the oil sands...?

“The provincial government”

	CANADA Jan 22-23	ALBERTA Jan 10-13	Region			
			South Jan 10-13	Calgary Jan 10-13	Edmonton Jan 10-13	North Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Total A Great Deal/Somewhat	88	93	94	95	93	88
A great deal	72	69	68	72	69	67
Somewhat	16	24	26	23	24	21
Not too much	3	3	2	3	5	3
Not at all	2	1	1	1	1	2
Total Not Too Much/Not At All	5	4	3	4	6	5
DK/NA/Ref	8	3	3	1	2	7

Q. And now for the following, please tell me how much you feel each has benefited from the development of the oil sands; that is have they benefited a great deal, somewhat, not too much of not at all? The first is...

Base: Total sample

How much have each of the following benefited from the development of the oil sands...?

“The people of Alberta”

	CANADA	ALBERTA	Region			
			South	Calgary	Edmonton	North
	Jan 22-23	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Total A Great Deal/Somewhat	90	88	91	91	84	88
A great deal	55	39	41	40	37	41
Somewhat	35	49	50	51	47	47
Not too much	3	8	7	5	14	7
Not at all	2	2	1	2	1	3
Total Not Too Much/Not At All	5	10	8	7	15	10
DK/NA/Ref	5	2	1	2	1	2

Q. And now for the following, please tell me how much you feel each has benefited from the development of the oil sands; that is have they benefited a great deal, somewhat, not too much of not at all? The first is...

Base: Total sample

How much have each of the following benefited from the development of the oil sands...?

“People in the rest of Canada”

	CANADA Jan 22-23	ALBERTA Jan 10-13	Region			
			South Jan 10-13	Calgary Jan 10-13	Edmonton Jan 10-13	North Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Total A Great Deal/Somewhat	59	68	72	68	66	65
A great deal	9	17	21	16	16	14
Somewhat	50	51	51	52	50	51
Not too much	25	20	19	21	22	19
Not at all	11	9	5	8	9	13
Total Not Too Much/Not At All	36	29	24	29	31	31
DK/NA/Ref	6	3	4	3	3	4

Q. And now for the following, please tell me how much you feel each has benefited from the development of the oil sands; that is have they benefited a great deal, somewhat, not too much of not at all? The first is...

Base: Total sample

Has immigration and migration to Alberta had a positive impact?

	ALBERTA	Region			
		South	Calgary	Edmonton	North
	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	800	200	262	252	200
	%	%	%	%	%
Mostly positive impact	51	49	57	47	46
Neither a positive nor a negative impact	30	33	27	31	29
Mostly negative impact	18	17	14	20	23
DK/NA/Ref	2	2	3	2	3

Q. The oil sands development has brought people from all over Canada and other parts of the world to Alberta. Has this had a mostly positive impact on Alberta, neither a positive nor a negative impact, or a mostly negative impact on Alberta?

Base: Total sample

Do Albertans support building a nuclear power plant?

	ALBERTA	Region			
		South	Calgary	Edmonton	North
	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	800	200	262	252	200
	%	%	%	%	%
Total SUPPORT	52	57	51	53	48
Strongly support	19	21	19	18	17
Somewhat support	33	35	32	35	31
Somewhat oppose	19	19	19	18	20
Strongly oppose	25	22	27	23	27
Total OPPOSE	44	41	46	41	47
DK/NA/Ref	4	2	4	6	5

Q. There has been some discussion of building a nuclear power plant in the province in order to provide the energy for extracting oil from the sands. Overall do you strongly support, somewhat support, somewhat oppose, or strongly oppose the building of a nuclear power plant in Alberta?

Base: Total sample

Does reduced greenhouse gas emissions change people's minds?

	ALBERTA	Region			
		South	Calgary	Edmonton	North
	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	382	83 ^C	123	123	100
	%	%	%	%	%
Total SUPPORTIVE	38	50	35	32	42
Strongly supportive	7	7	8	6	6
Somewhat supportive	31	43	27	26	36
Somewhat opposed	25	17	25	31	25
Strongly opposed	31	30	34	30	27
Total OPPOSED	56	47	59	60	52
DK/NA/Ref	6	3	6	8	6

Q. At present, natural gas is used as the energy source to extract oil from the sands and this is creating greenhouse gases. Thinking about the nuclear power station again, if using nuclear power to extract oil reduced greenhouse gases, would you be strongly supportive, somewhat supportive, somewhat opposed, or strongly opposed to the building of a nuclear power station in the province?

Base: Those respondents who are strongly or somewhat opposed or "don't know" in Q.36

Should farmers and ranchers get priority access to water over oil extraction companies?

	ALBERTA	Region			
		South	Calgary	Edmonton	North
	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	800	200	262	252	200
	%	%	%	%	%
Farmers and ranchers	83	87	80	84	84
The oil sands development	7	5	9	7	7
DK/NA/Ref	10	9	11	9	9

Q. Both ranchers and farmers and the oil sands development require large amounts of the province's water. Who among these two should have priority in accessing water? Should it be farmers and ranchers or the oil sands development?

Base: Total sample

Do Albertans believe the recent decision to increase oil and gas royalty rate will impact the pace of development?

	ALBERTA	Region			
		South	Calgary	Edmonton	North
	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	800	200	262	252	200
	%	%	%	%	%
No change in the pace of development	65	65	55	74	67
Decline in oil and gas development	29	29	40	20	26
DK/NA/Ref	6	6	5	7	7

Q. As you may recall, the Stelmach government recently increased the oil and gas royalty paid to the province. Do you think that this will result in a decline in oil and gas development or that there will be no change in the pace of development?

Base: Total sample

Do natural resources belong to all Canadians or to just the people in the province where the resource is found?

	CANADA Jan 22-23	ALBERTA Jan 10-13	Region			
			South Jan 10-13	Calgary Jan 10-13	Edmonton Jan 10-13	North Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Belonging to all Canadians	66	55	54	55	57	49
Belonging to the people who live in the province where the resource is found	29	42	44	40	40	46
DK/NA/Ref	5	3	2	5	3	5

Q. Each of the provinces possesses their own unique natural resources – from the fisheries on the East coast, to agriculture on the prairies and so on. Do you think of these resources as belonging to all Canadians or only to the people who live in the province where the resource is found?

Base: Total sample

Should natural resource revenues be shared?

	CANADA	ALBERTA	Region			
			South	Calgary	Edmonton	North
	Jan 22-23	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Part should be shared with other Canadians but the majority should go to the people who live in that province	52	57	52	56	63	51
Current system is fair, and the money should belong only to the people in that province	19	32	34	33	30	35
Shared equally with all Canadians regardless of the province they live	24	9	10	10	6	14
DK/NA/Ref	5	2	3	2	1	1

Q. As you may know, under the Canadian constitution, provinces receive ALL royalty payments from resources that are extracted from within their provincial boundaries. Do you think this money should be shared equally with all Canadians regardless of the province where they live; part should be shared with other Canadians but the majority should go to the people who live in that province; or that the current system is fair, and the money should belong only to the people in that province?

Base: Total sample

Should oil and gas revenues be shared?

	CANADA	ALBERTA	Region			
			South	Calgary	Edmonton	North
	Jan 22-23	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	500	800	200	262	252	200
	%	%	%	%	%	%
Oil prices rise and fall all the time and all provinces, including Alberta, should be allowed to keep the revenues from their resources	30	64	62	62	64	69
While rising oil prices help Alberta, this money should be shared with the other provinces that are hurt by higher energy costs	64	30	31	33	29	27
DK/NA/Ref	5	6	6	5	7	4

Q. The government of Alberta has just announced that it will record a budget surplus, largely as a result of the increased royalties it receives from rising energy prices. Some people say that while rising oil prices help Alberta, this money should be shared with the other provinces that are hurt by higher energy costs. Others say that oil prices rise and fall all the time and that all provinces, including Alberta, should be allowed to keep the revenues from their resources. Which one of these two points of view best represents your own?

Base: Total sample

Do Albertans believe there is enough fresh water to meet the needs in future years?

	ALBERTA	Region			
		South	Calgary	Edmonton	North
	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	800	200	262	252	200
	%	%	%	%	%
Yes	37	44	36	37	31
No	52	44	53	53	58
DK/NA/Ref	11	13	11	10	11

Q. Do you believe that there is enough fresh water in Alberta to meet the needs of Alberta residents and industries given the current pace of development of the oil sands and oil production in general? Yes/No

Base: Total sample

Are Albertans concerned about the availability of fresh water in future years?

	ALBERTA	Region			
		South	Calgary	Edmonton	North
	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	800	200	262	252	200
	%	%	%	%	%
Total CONCERNED	82	78	83	82	83
Very concerned	45	39	46	44	49
Somewhat concerned	37	40	37	38	34
Not too concerned	14	18	11	14	13
Not at all concerned	4	2	6	4	4
Total NOT CONCERNED	18	20	16	18	17
DK/NA/Ref	<1	2	1	-	-

Q. How concerned are you about the availability of fresh water for Alberta residents and industries in future years? Are you very concerned, somewhat concerned, not too concerned, or not at all concerned?

Base: Total sample

Do Albertans believe that the development of the oil sands is having a negative impact on climate change?

	ALBERTA	Region			
		South	Calgary	Edmonton	North
	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	800	200	262	252	200
	%	%	%	%	%
Yes	65	58	66	68	63
No	30	37	27	27	31
DK/NA/Ref	6	5	7	6	6

Q. Do you believe that the development of the oil sands is having a negative impact on climate change? Yes/No
 Base: Total sample

How concerned are Albertans that the development of the oil sands is having a negative impact on climate change?

	ALBERTA	Region			
		South	Calgary	Edmonton	North
	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13	Jan 10-13
n=	800	200	262	252	200
	%	%	%	%	%
Total CONCERNED	70	68	72	72	67
Very concerned	25	20	23	29	28
Somewhat concerned	45	48	49	43	39
Not too concerned	19	22	16	20	21
Not at all concerned	9	8	11	8	9
Total NOT CONCERNED	28	30	27	28	30
DK/NA/Ref	1	2	1	<1	3

Q. How concerned are you that the oil sand development is having a negative impact on climate change? Are you very concerned, somewhat concerned, not too concerned, or not at all concerned?

Base: Total sample