



# EYE ON ALBERTA

August 2012

## ALBERTA'S POLITICAL LANDSCAPE

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# VOICE OF ALBERTA POLL SURVEY METHODOLOGY

- 👁️ Study fielded via online research panel, July 30 - August 6, 2012. Panel Source: Voice of Alberta.
- 👁️ n=1090
- 👁️ Weighted to reflect gender, age, region of Alberta population
- 👁️ Sample of 1090, margin of error - which measures sampling variability - is +/- 3.0%
- 👁️ Margin of error larger & varies for smaller subsamples



# REGIONAL SAMPLE SIZES & MARGINS OF ERROR

	TOTAL INTERVIEWS (n)	MARGIN OF ERROR
<b>ALBERTA TOTAL</b>	<b>1090</b>	<b>+/- 3.0 %</b>
<b>Calgary CMA</b>	<b>366</b>	<b>+/- 5.1 %</b>
<b>Edmonton CMA</b>	<b>332</b>	<b>+/- 5.4 %</b>
<b>North</b>	<b>141</b>	<b>+/- 8.3 %</b>
<b>Central</b>	<b>131</b>	<b>+/- 8.6 %</b>
<b>South</b>	<b>120</b>	<b>+/- 9.0 %</b>





## Redford Receives a 2nd Honeymoon



# POLITICAL LANDSCAPE SUMMER 2012

## WELCOME TO “ALISON’S WORLD”

- 👁 Campaign victory, abbreviated session, honeymoon...

  - 👁 Sound familiar?

- 👁 Redford clearly enjoying strong second honeymoon

  - 👁 Personal numbers have recovered & strengthened since election

  - 👁 Government approval numbers are turning around

- 👁 Next Session in October

  - 👁 Pivotal in cementing voter impressions

  - 👁 Lessons learned from the mistakes of February/March?

  - 👁 Budget issues, expenses scandal, pipeline showdowns...





# PROVINCIAL PARTY LEADERSHIP EVALUATIONS

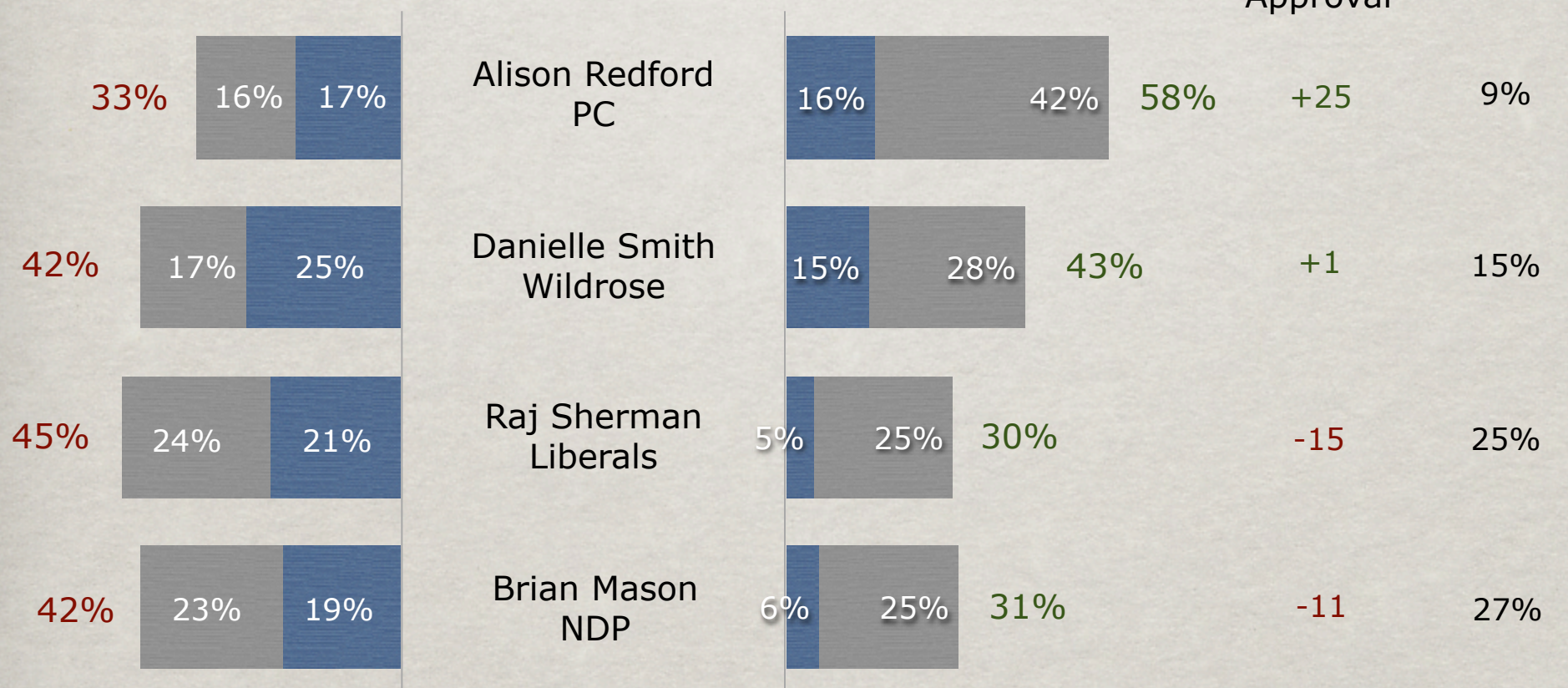
Strongly Somewhat

DISAPPROVE

APPROVE

Net Approval

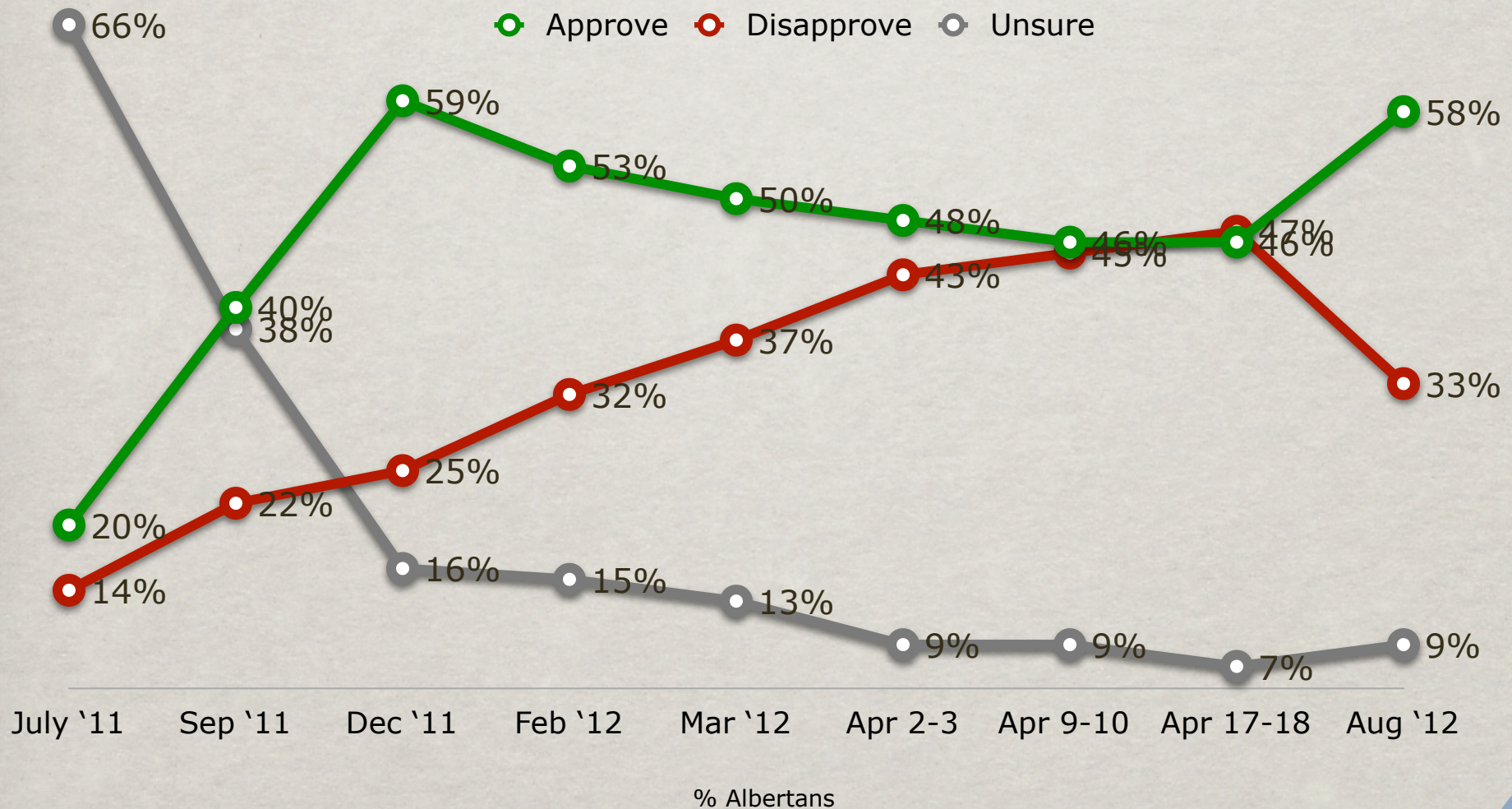
Unsure



% Albertans



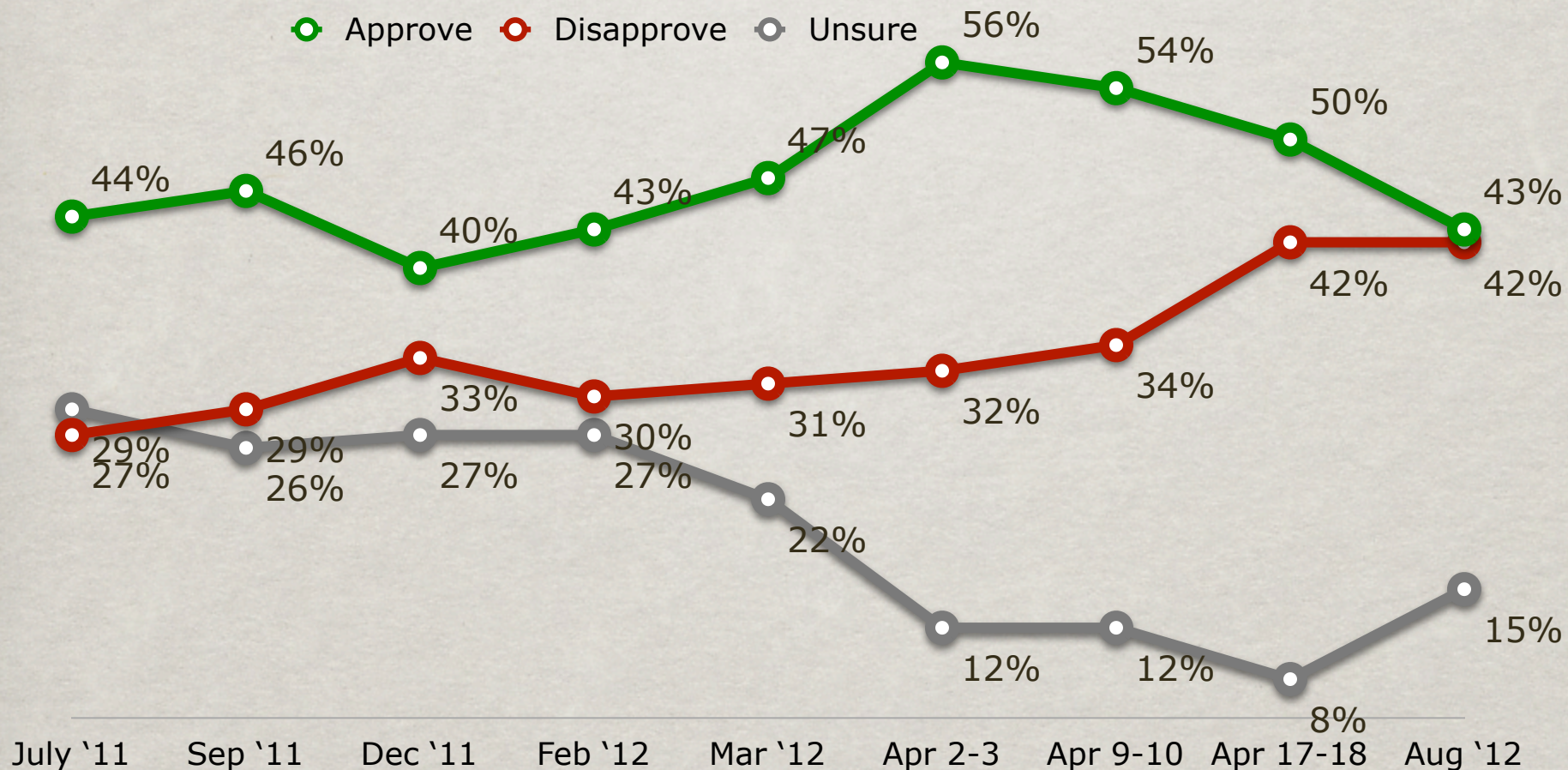
# LEADER EVALUATIONS ALISON REDFORD





# LEADER EVALUATIONS

## - DANIELLE SMITH -



% Albertans

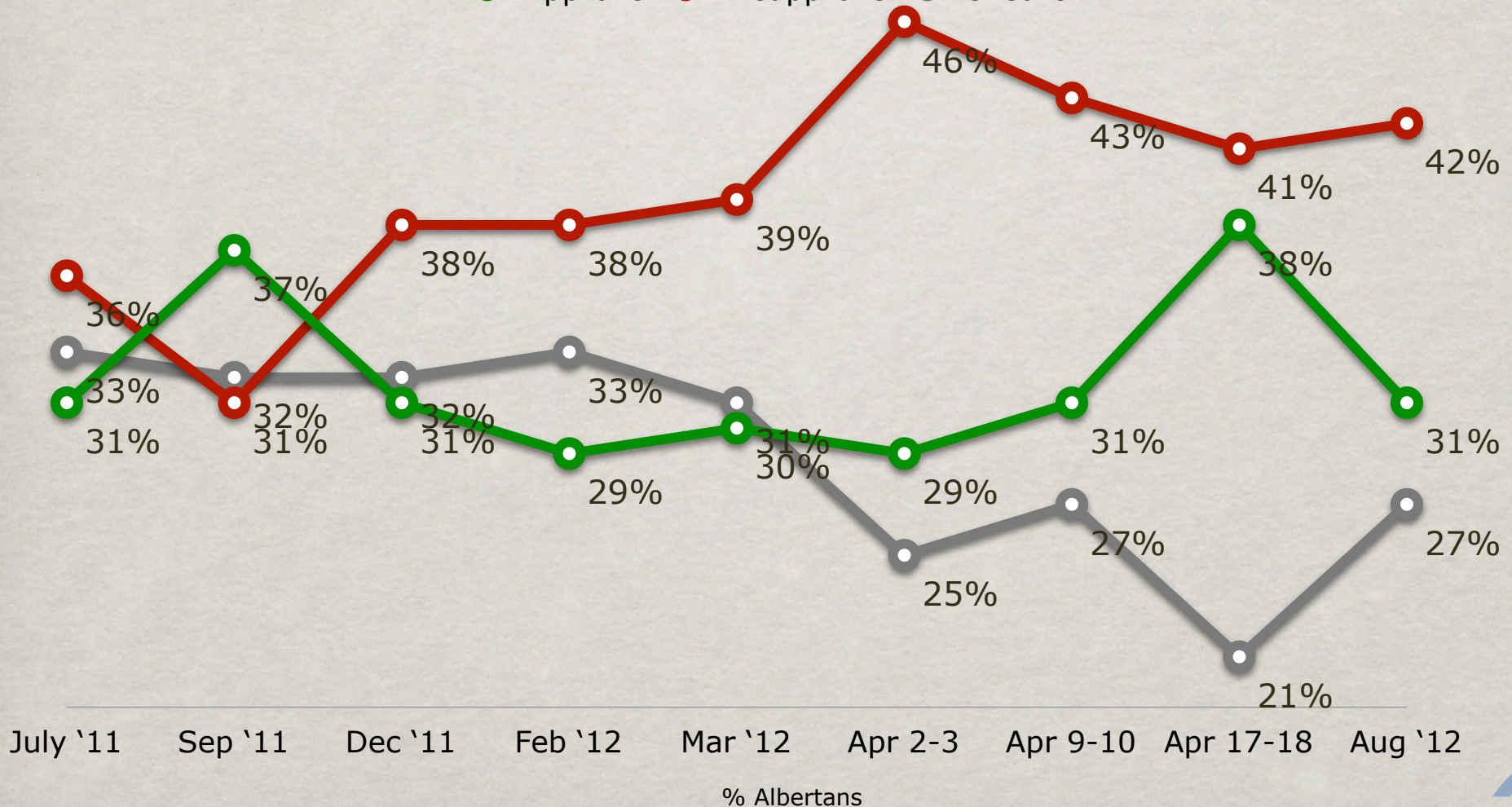


# LEADER EVALUATIONS

## - BRIAN MASON -



● Approve
 ● Disapprove
 ● Unsure



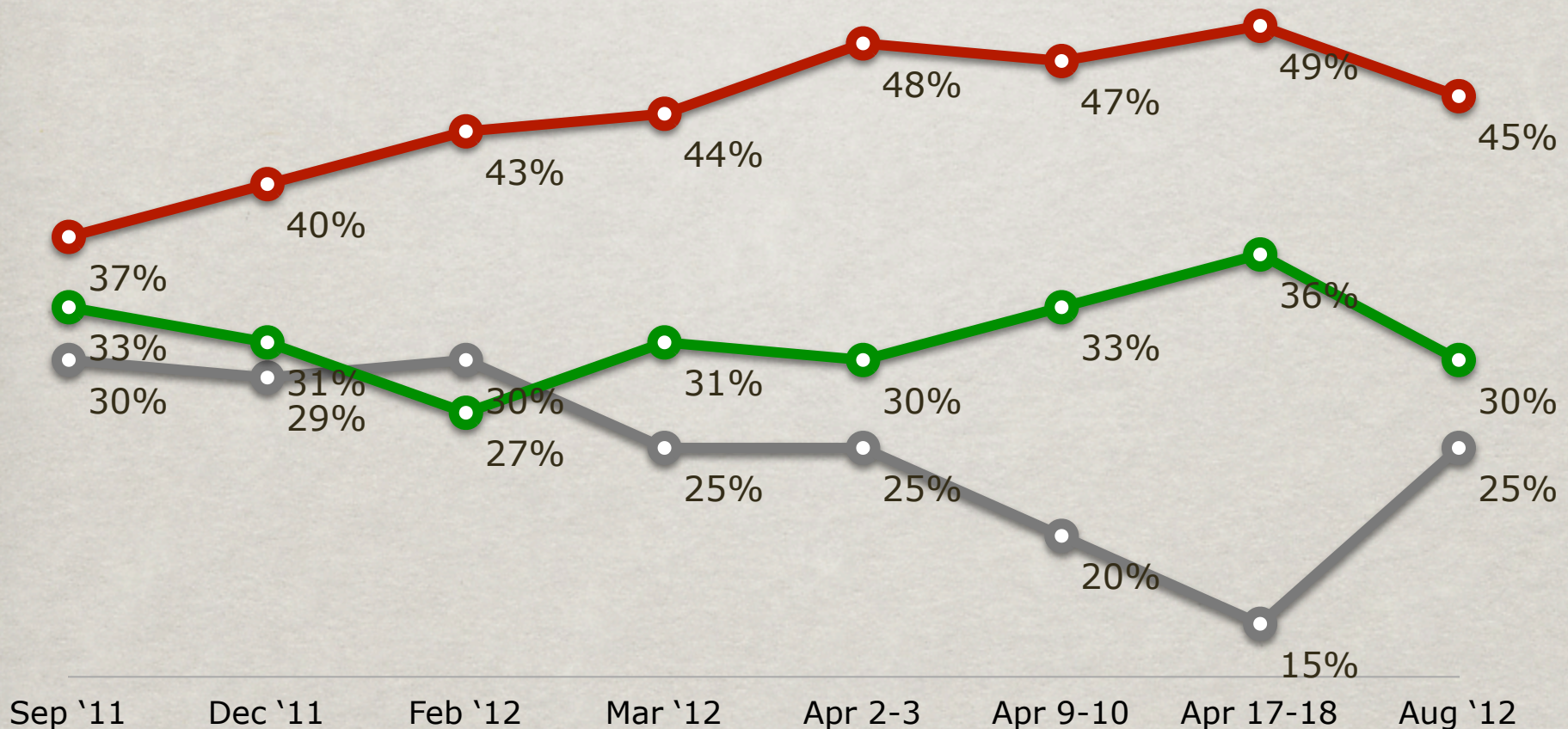


# LEADER EVALUATIONS

## - RAJ SHERMAN -



● Approve ● Disapprove ● Unsure

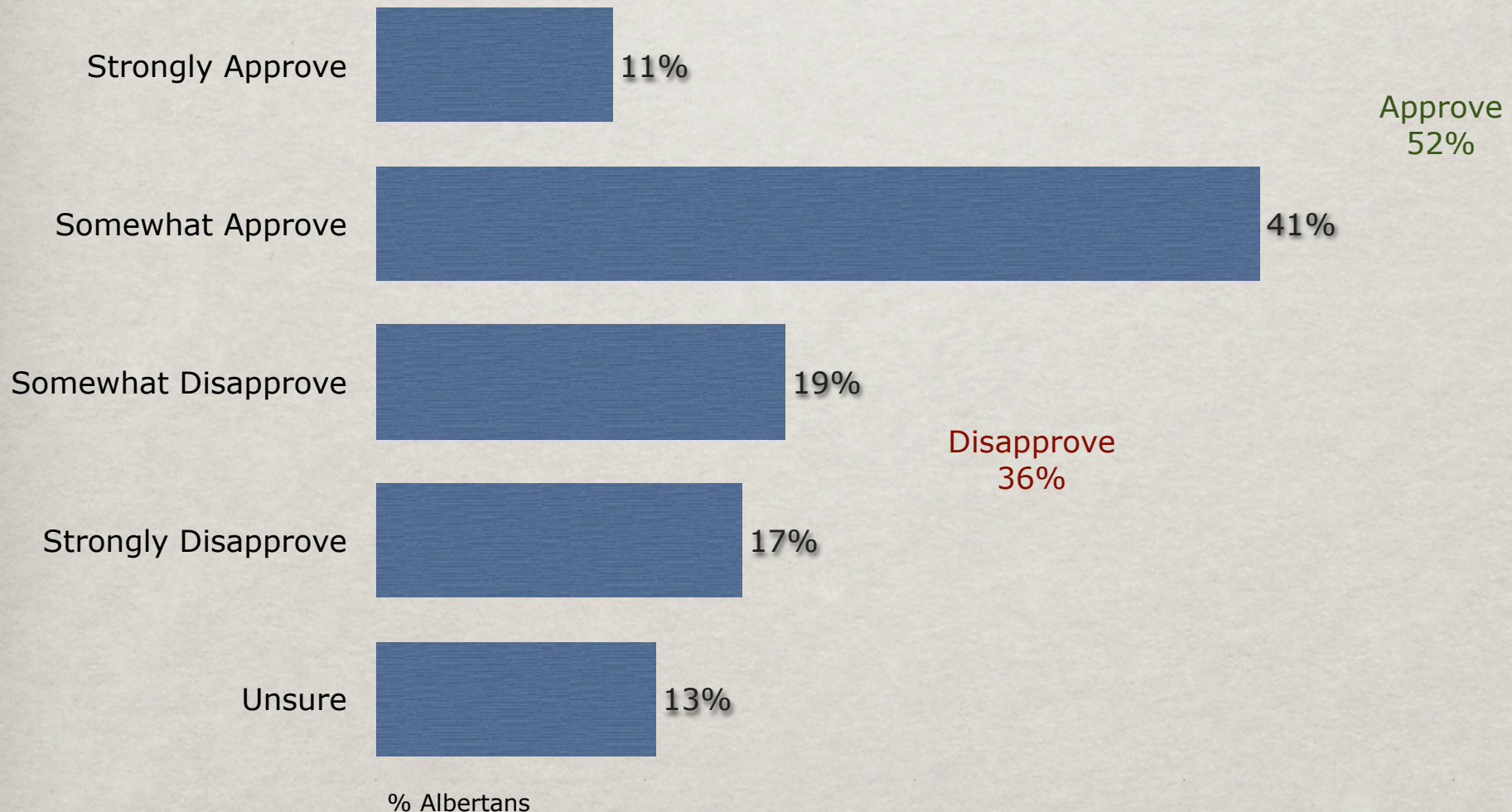


% Albertans



# PROVINCIAL GOVERNMENT PERFORMANCE

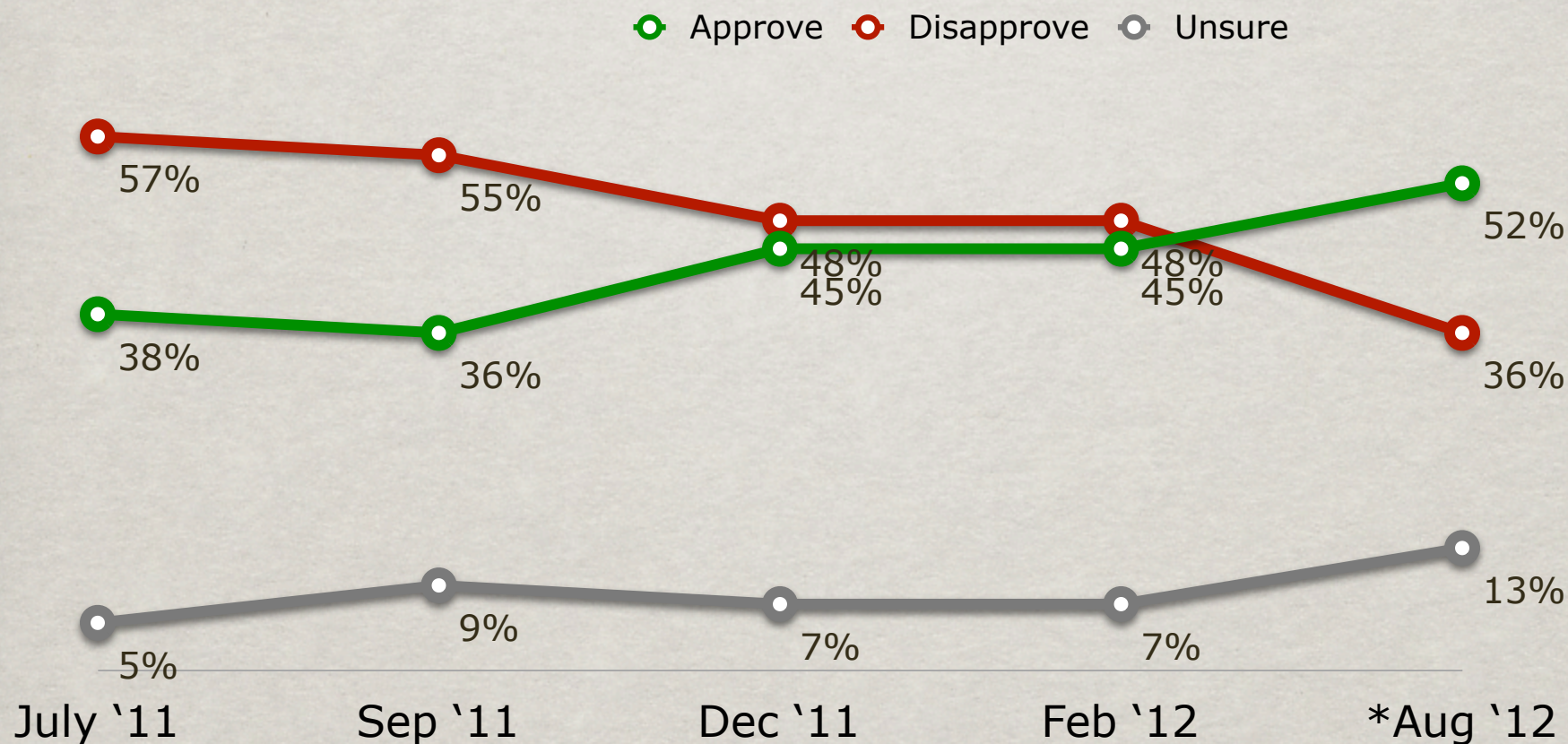
"The Provincial Progressive Conservatives were re-elected as the government of Alberta in April 2012. Would you say that you personally approve or disapprove of their performance as Government since then?"





# TRACKING PROVINCIAL GOVERNMENT PERFORMANCE (AUGUST 2012)

"The Provincial Progressive Conservatives were re-elected as the government of Alberta in March 2008/\*April 2012. Would you say that you personally approve or disapprove of their performance as Government since then?"





# Northern Gateway:

Oilsands Marco Polo or a  
Chinese Finger Trap?





# NORTHERN GATEWAY: SCIENCE NOT POLITICS?

- 👁 PM says “science not politics” will decide Northern Gateway’s fate
- 👁 Is that a directive or desire?
  - 👁 Focus on “science” likely only way to move NG forward
  - 👁 Politics of the situation heavily stacked against the project
  - 👁 Strong opposition in B.C., with both provincial and federal implications
  - 👁 Opposition to royalty sharing in AB
  - 👁 Public/political goodwill toward Enbridge lacking given recent events in other jurisdictions
    - 👁 Public case will be Enbridge’s to make with little support from political circles





## B.C. MIGHT SUPPORT GATEWAY WITH THE RIGHT INCENTIVES?

- 👁 Nearly 6-in-10 BC residents oppose Northern Gateway
- 👁 Trailing in the polls & May 2013 election looming...
- 👁 Outlines necessary conditions for B.C. Gov't support
  - 👁 Environmental equivalent of "Distinct Society"
  - 👁 Most contentious condition is a "fair share of fiscal & economic benefits"
  - 👁 Vague definition, but clear implication: Alberta & Feds must negotiate a "better deal" for BC or Northern Gateway won't happen
- 👁 Clark fails to get an up-tick from Gateway conditions





# ALBERTANS SUPPORT NORTHERN GATEWAY BUT NOT SHARING ROYALTIES

- 👁 Redford defends Alberta's oil royalties - although Clark's vague language meant they were never really under attack
- 👁 Albertans strongly support Redford's stand
  - 👁 Nearly 70% approve of Premier's rebuff of B.C. demands
  - 👁 Albertans sympathetic to B.C.'s argument, but believe it's up to the pipeline proponent (Enbridge), not the Alberta government, to make B.C. supportive
- 👁 If forced to choose, majority of Albertans would rather see Northern Gateway fail, than to see Alberta give up any oil royalties





# WILL THE FEDS STEP IN TO SAVE NORTHERN GATEWAY?

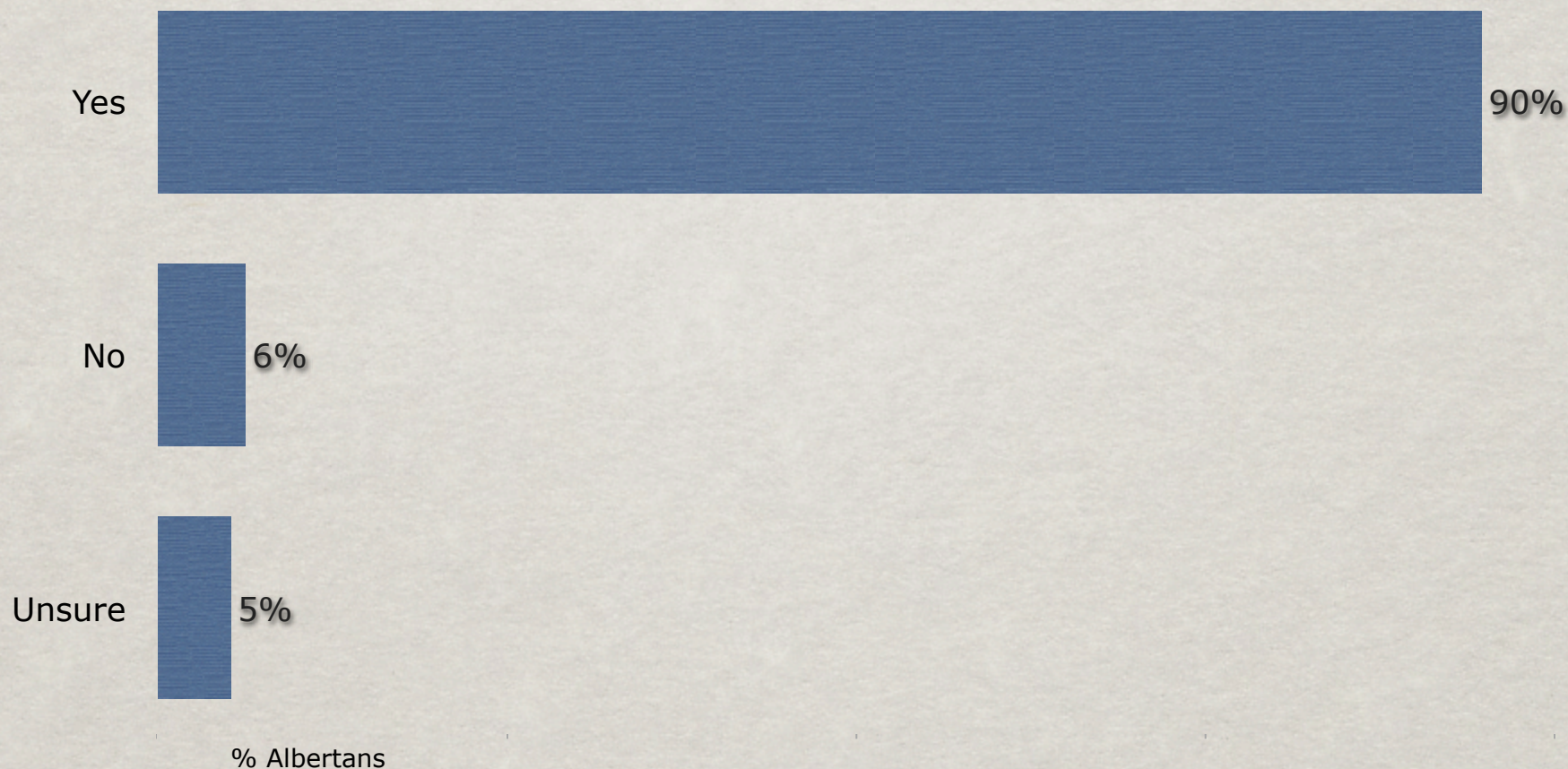
- NEB Panel assessment on Gateway now due December 31, 2013; next federal election October 2015
- Politics suggest Conservatives reluctant to intervene directly
  - Cabinet members starting to soften supportive language
  - Conservatives hold 8 seat majority in current Commons - 21 out of 36 seats in BC
  - BC seats growing in next election to 42
- Gateway is a deeply divisive issue in BC
  - Direct intervention to push Gateway would likely not only cost them some current seats, but also future new seats (and potentially Government)





# PUBLIC AWARENESS OF NORTHERN GATEWAY PIPELINE

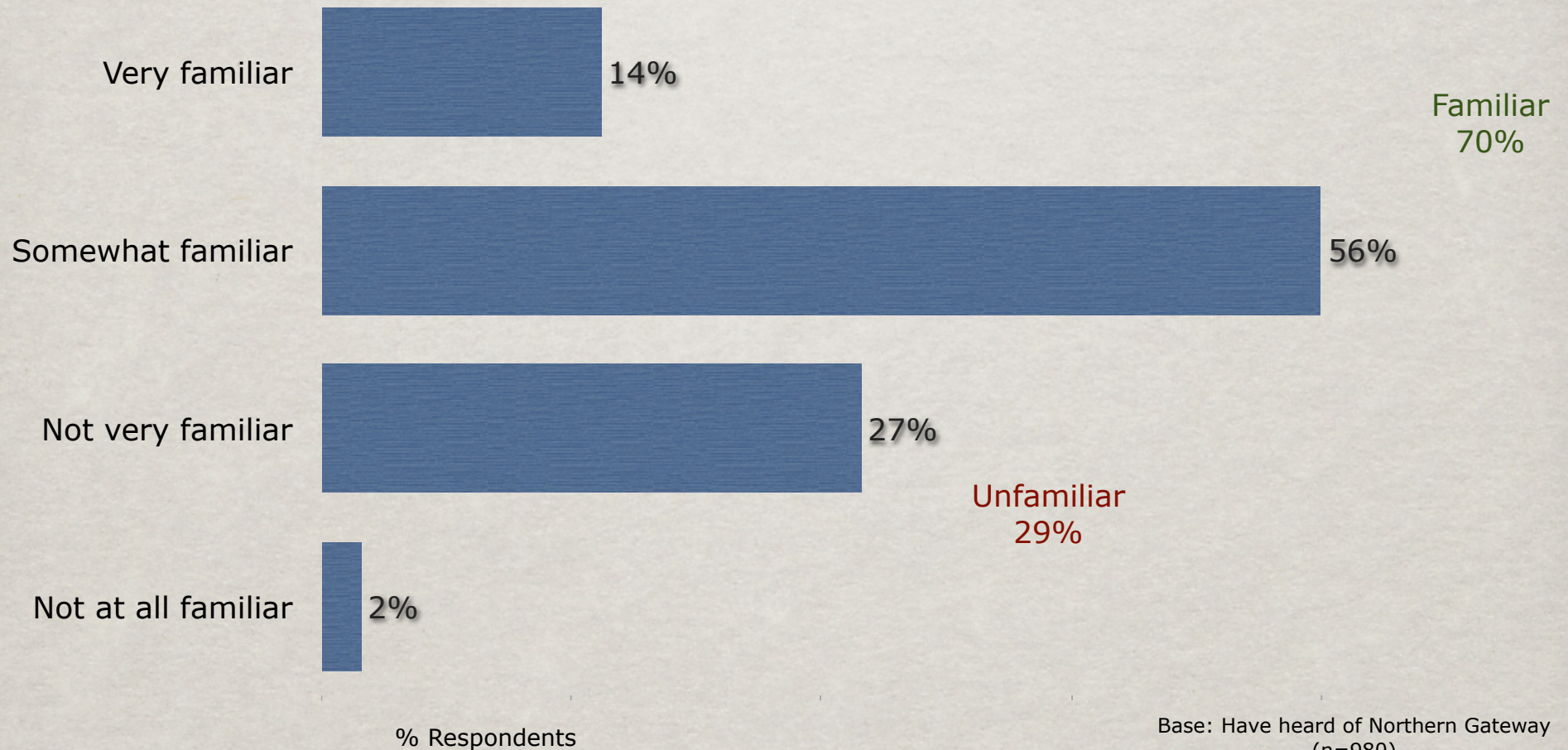
"Before today, have you ever heard of the Northern Gateway Pipeline project?"





# FAMILIARITY WITH NORTHERN GATEWAY PIPELINE

"And how familiar would you say you are with the Northern Gateway Pipeline project? Are you...?"

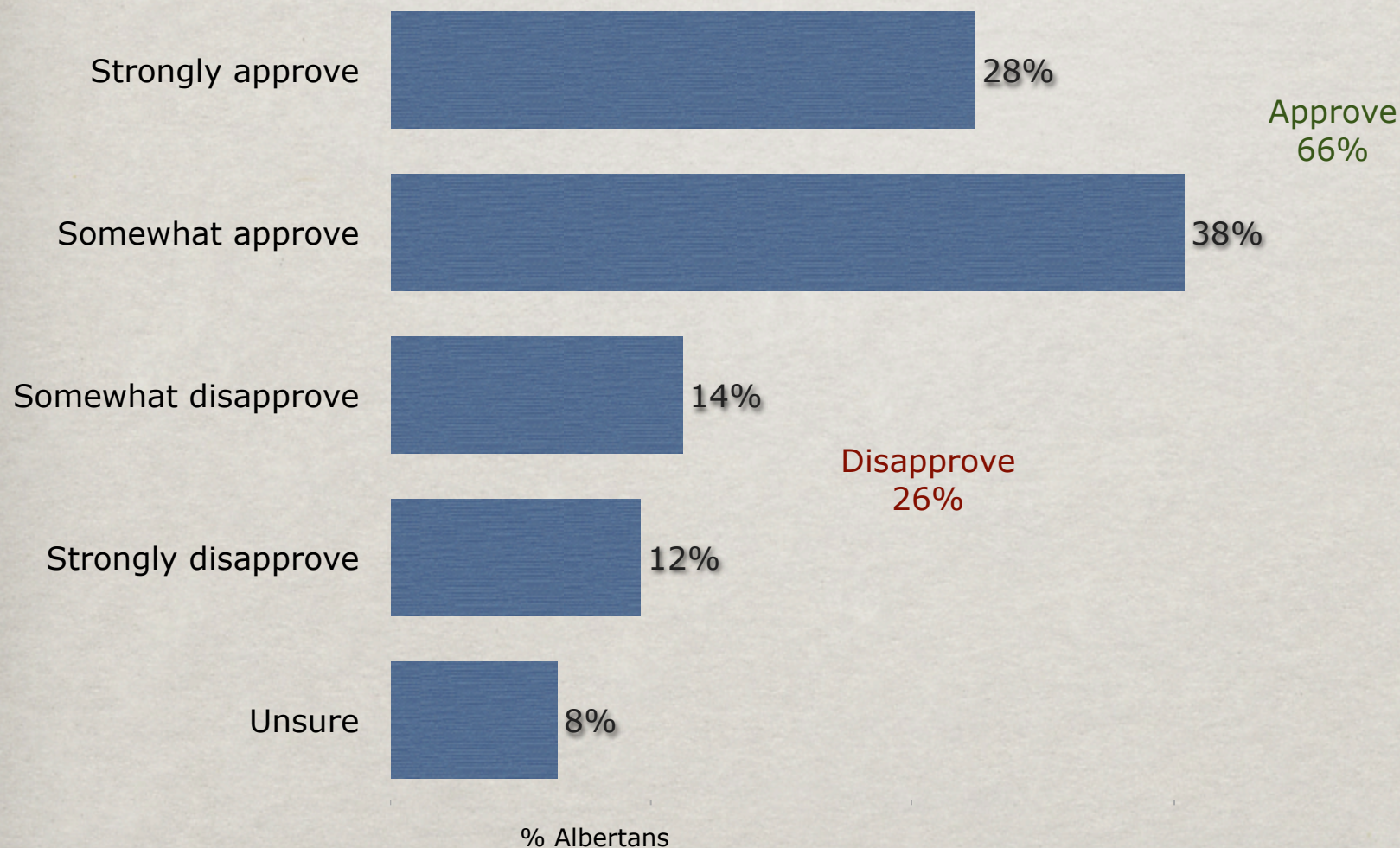




# PUBLIC SUPPORT FOR NORTHERN GATEWAY PIPELINE

"The Northern Gateway is a pipeline being proposed for construction by Enbridge. It will be 1,177 km long and run between Edmonton and Kitimat, B.C. It would carry oilsands bitumen to the B.C. coast for transport and refining in Asia. Enbridge's application for the pipeline is currently being reviewed by a federal panel called the National Energy Board."

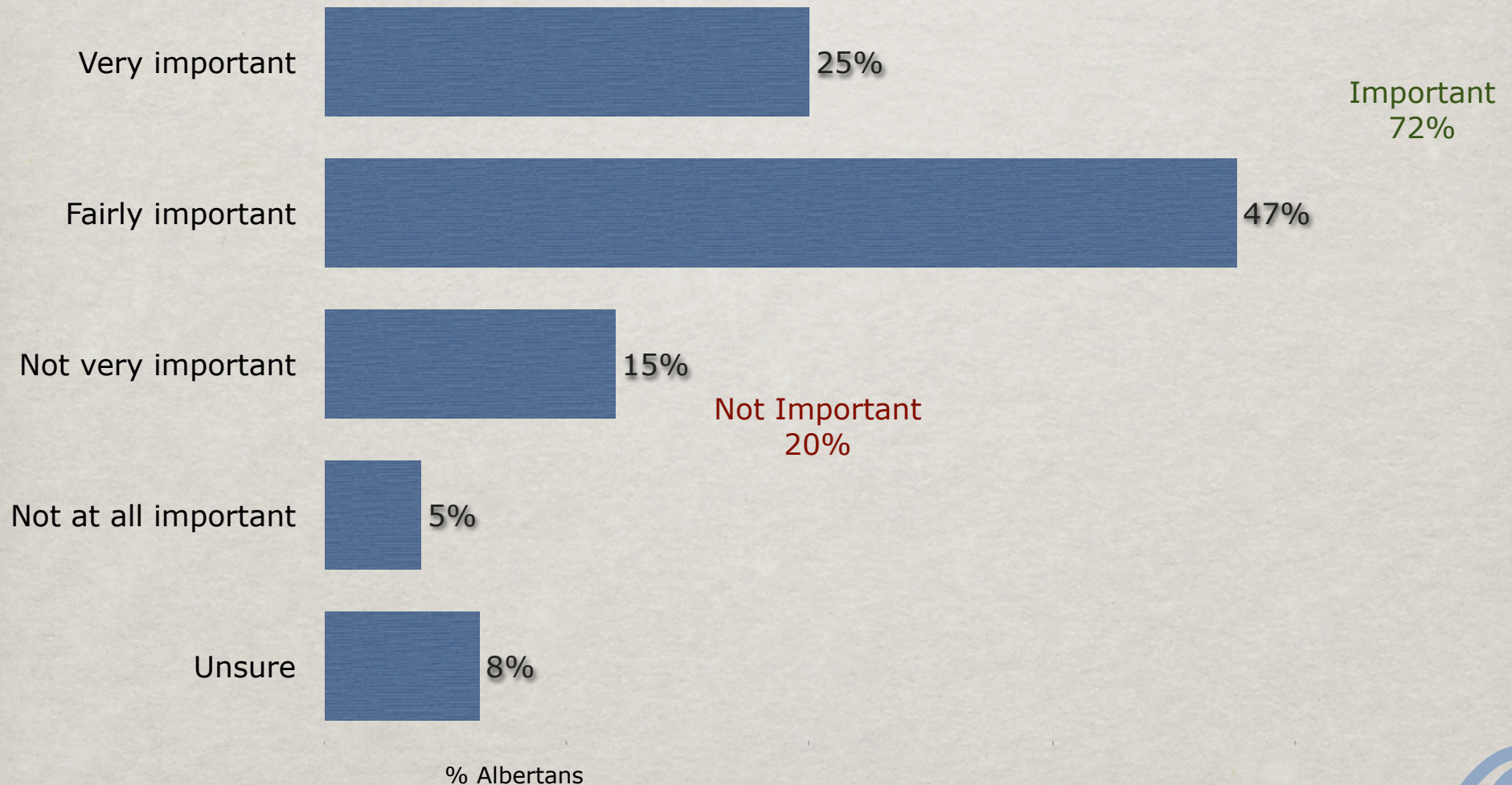
"Overall, would you say you personally approve or disapprove of the Northern Gateway Pipeline?"





# PERCEIVED IMPORTANCE OF NORTHERN GATEWAY TO FUTURE OF AB ECONOMY

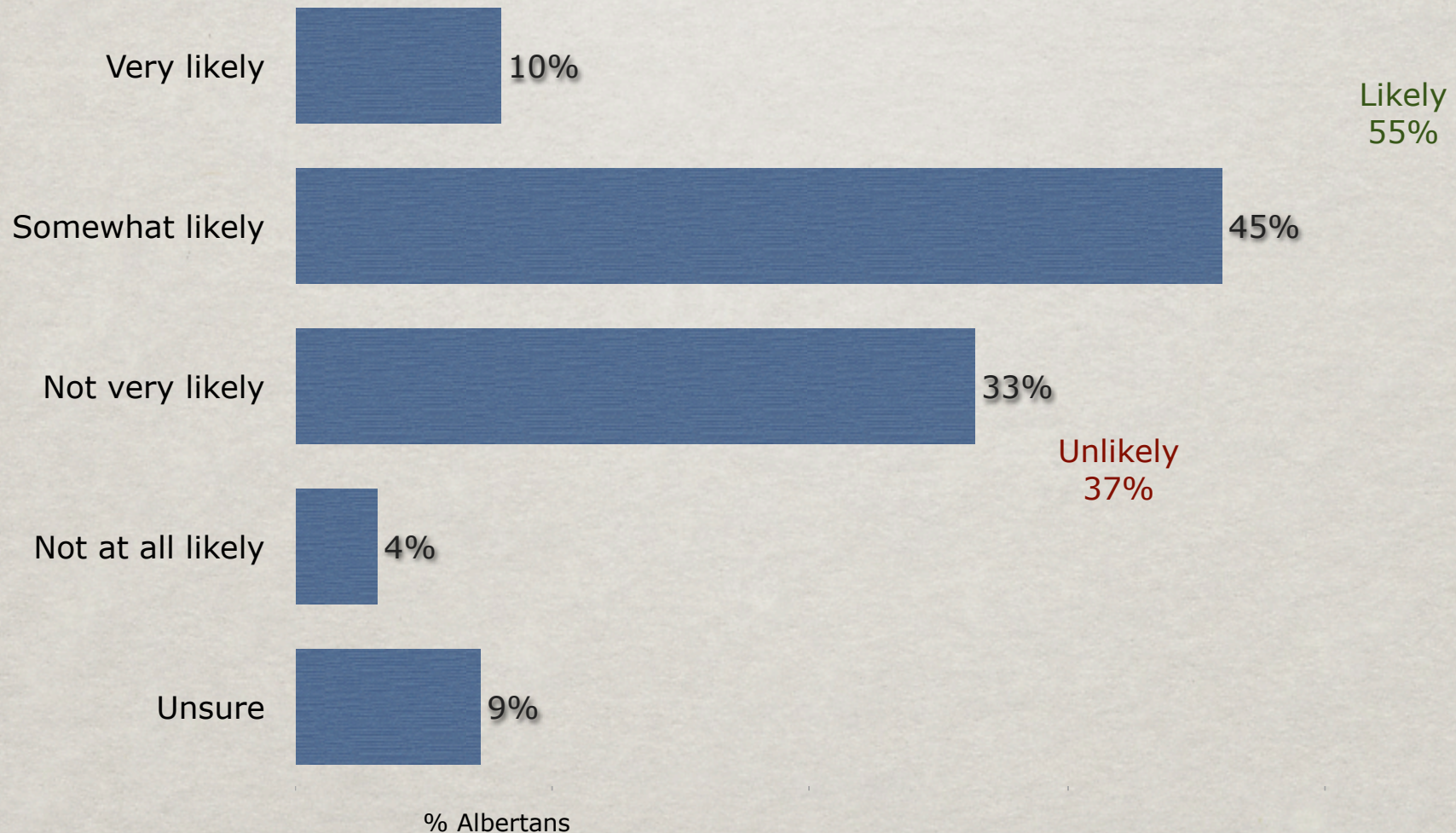
"When it comes to Alberta's future economic prosperity, how important do you think the Northern Gateway Pipeline is for the economy?"





# PUBLIC PREDICTIONS FOR THE NORTHERN GATEWAY PIPELINE

"And based upon your impressions today, how likely do you think it is that the Northern Gateway Pipeline **will actually be built** in the next few years?"





# ALBERTANS REACT TO B.C.'S 5 CONDITIONS FOR NORTHERN GATEWAY

"The Northern Gateway Pipeline is quite controversial in British Columbia. Recently the Premier of B.C. outlined 5 conditions which she says need to be met in order for the B.C. Government to consider supporting the project. We've listed these 5 conditions below. Please indicate whether or not you personally feel each is fair and reasonable or not?"

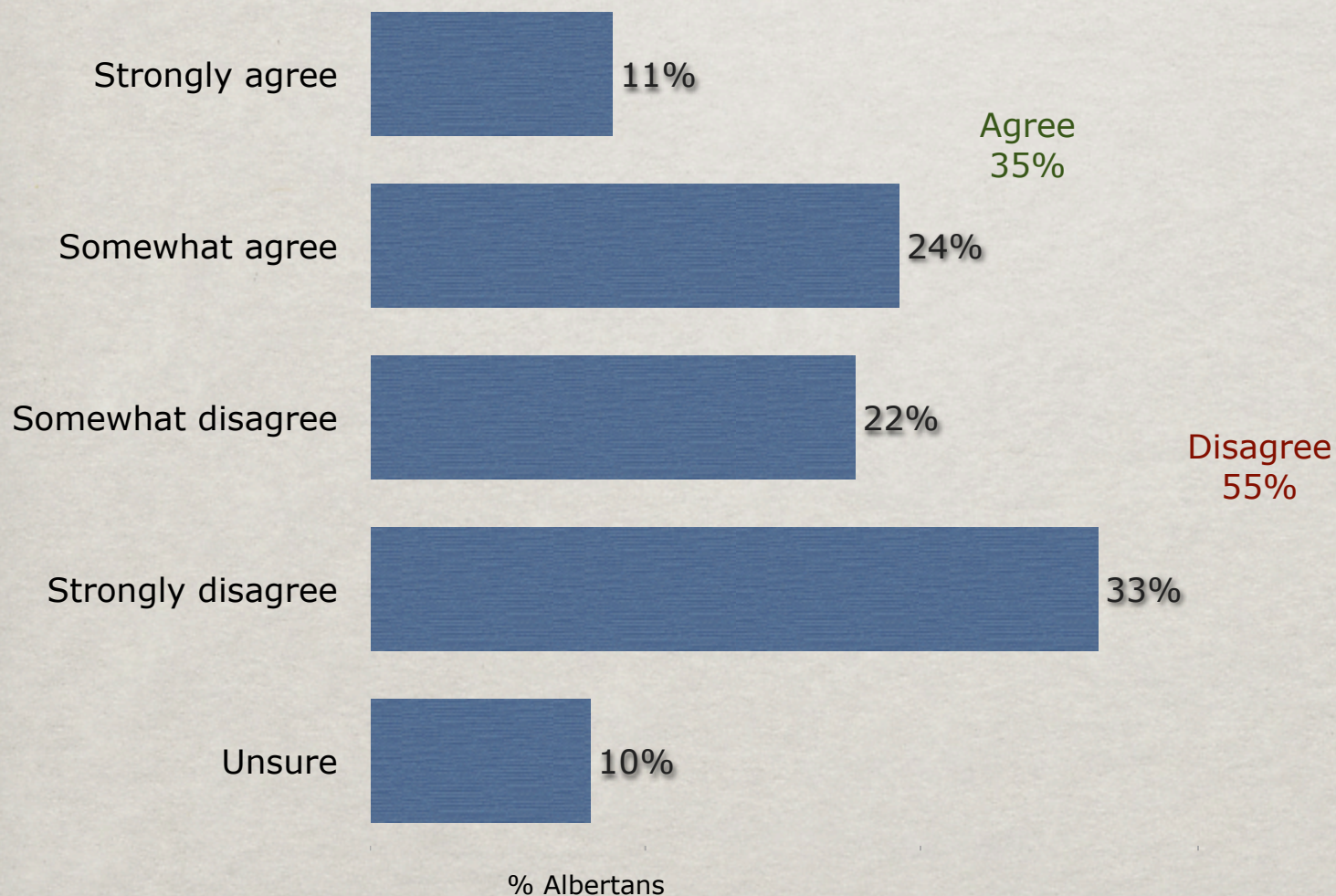




# ALBERTANS REACT TO B.C. PREMIER'S POSITION ON GATEWAY

"B.C. Premier Christy Clark recently said that as it stands today, she feels that British Columbia would not receive enough economic benefit from the Northern Gateway Pipeline in comparison to the environmental risk it poses. Therefore she says the Federal and Alberta governments need to negotiate a better financial deal with British Columbia if the pipeline is to go ahead."

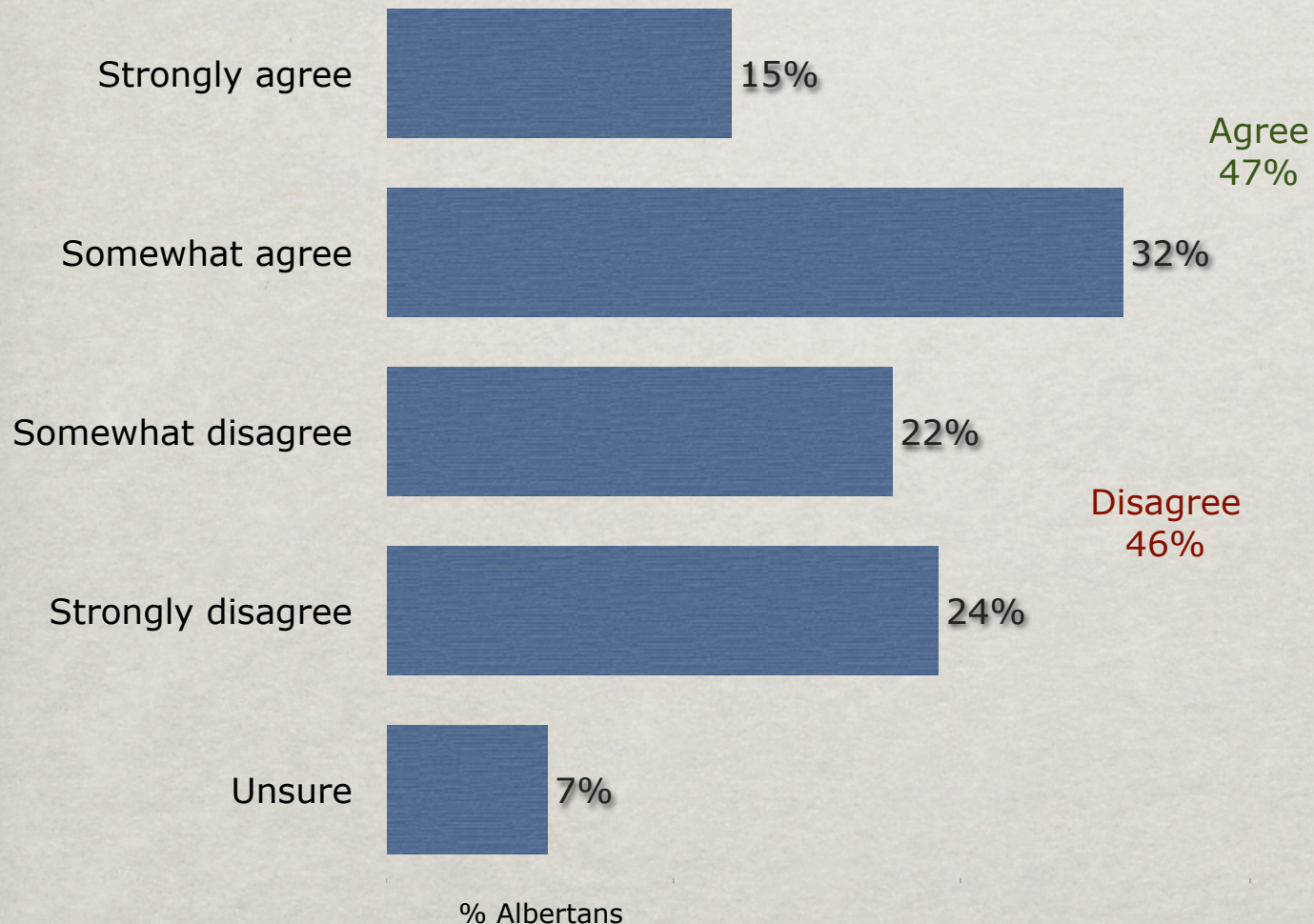
"Overall, would you say you agree or disagree with the B.C. Premier's position on the issue?"





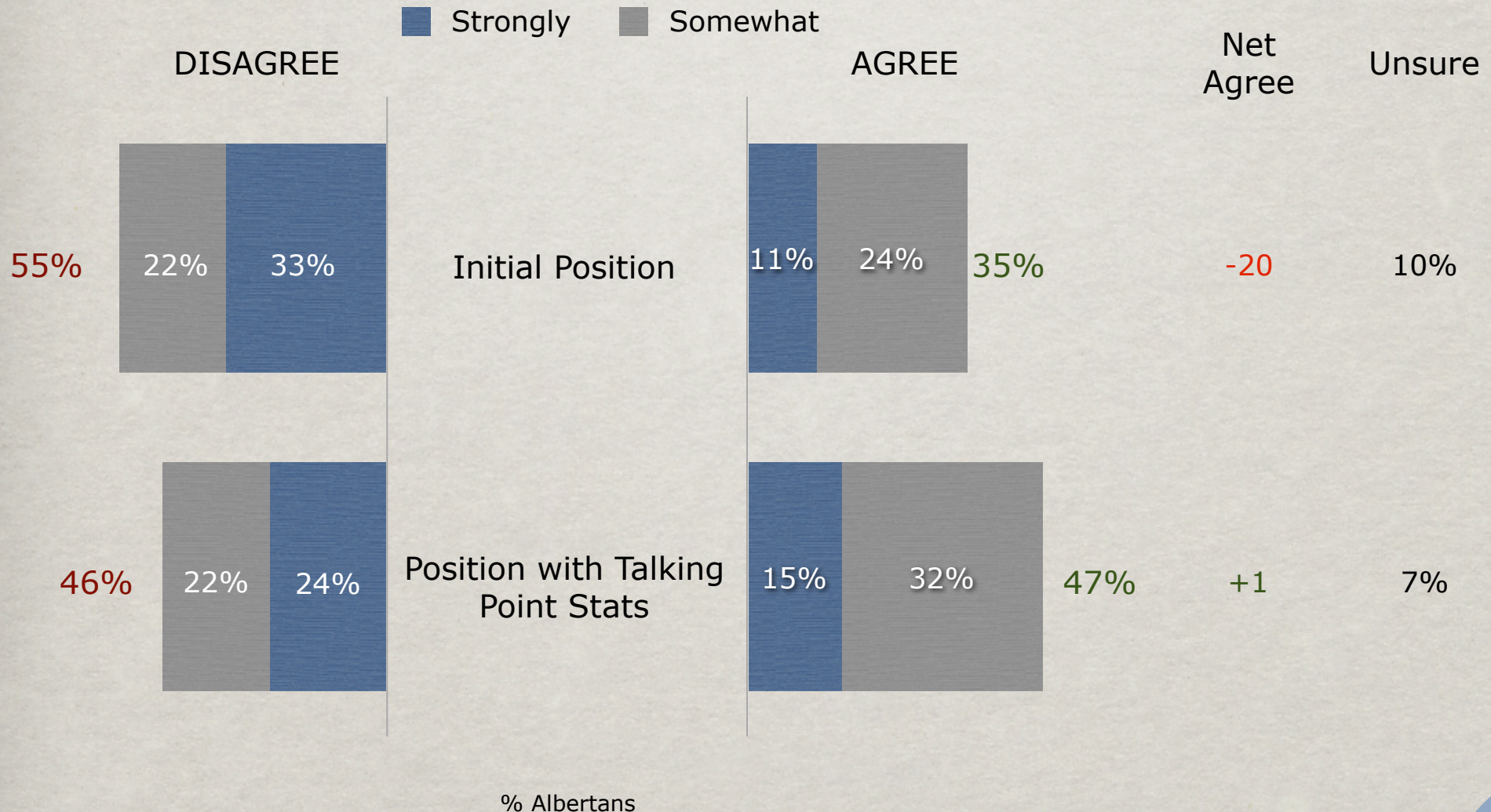
# ALBERTANS REACT TO B.C. PREMIER'S POSITION ON GATEWAY - TALKING POINT VERSION -

"B.C. Premier Christy Clark said that environmentally British Columbia would be accepting 100% of the marine risk and 58% of the land risk associated with a pipeline spill, but is only going to be receiving 8% of the tax revenue generated by the Northern Gateway Pipeline. Knowing this, would you say you agree or disagree with the position that the Federal and Alberta governments need to negotiate a better financial deal with British Columbia if the pipeline is to go ahead?"





# MESSAGING MATTERS: COMPARING ALBERTANS' REACTIONS TO B.C. POSITION ON NORTHERN GATEWAY

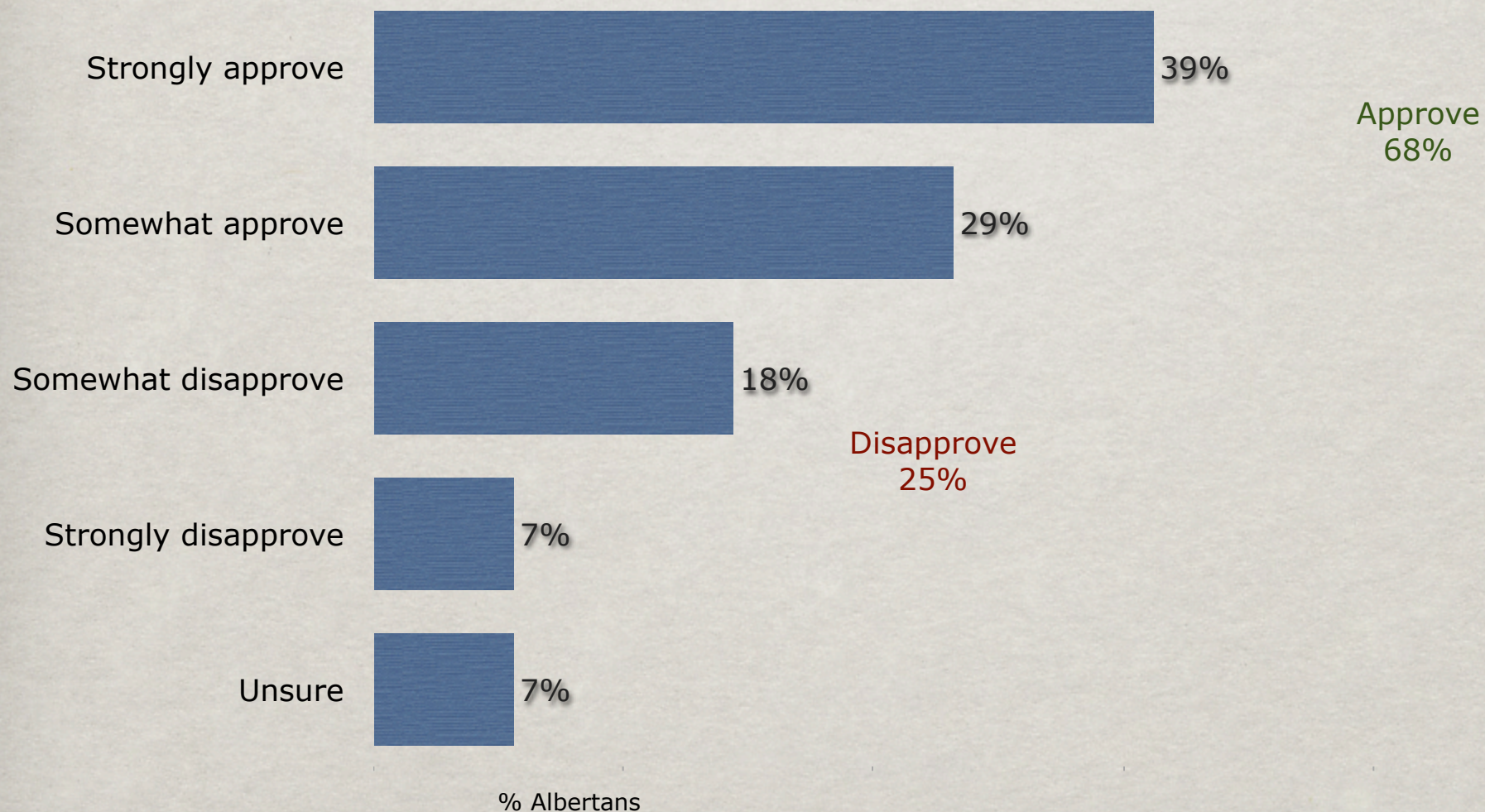




# ALBERTANS REACT TO PREMIER REDFORD'S REBUFF OF B.C. ON GATEWAY

"In response to B.C.'s call for more economic benefits from the Northern Gateway Pipeline, Alberta Premier Alison Redford said that she would be happy to sit down to talk with the B.C. Premier, but Alberta is not prepared to share oil royalties with B.C."

"Overall, would you say that you approve or disapprove of Premier Redford's position on this issue?"





# ALBERTANS CHOOSE: OIL ROYALTIES VS. GATEWAY

"If you were the Premier of Alberta and presented with the following two options, which would you choose?"

Give up a portion of Alberta's oil royalties to the gov't of BC to get their support, improving the likelihood that Northern Gateway will proceed

29%

Do not give up a portion of Alberta's oil royalties to the gov't of BC knowing their opposition may reduce the likelihood that Northern Gateway will proceed

52%

Unsure

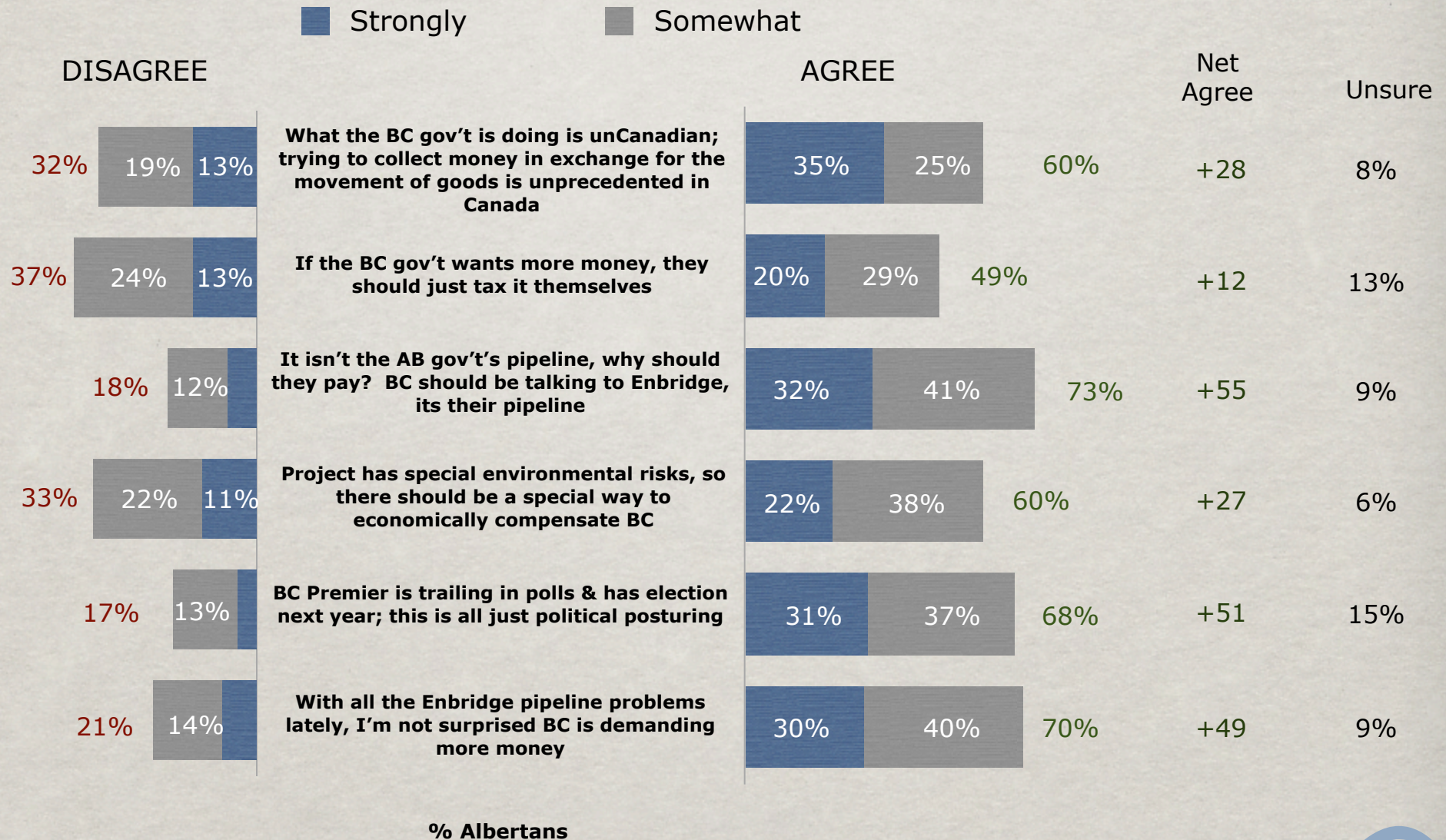
19%

% Albertans



# NORTHERN GATEWAY ATTITUDINALS

"The following are a list of statements that some people might say about the issue of the Northern Gateway Pipeline. Please indicate if you personally agree or disagree with each?"

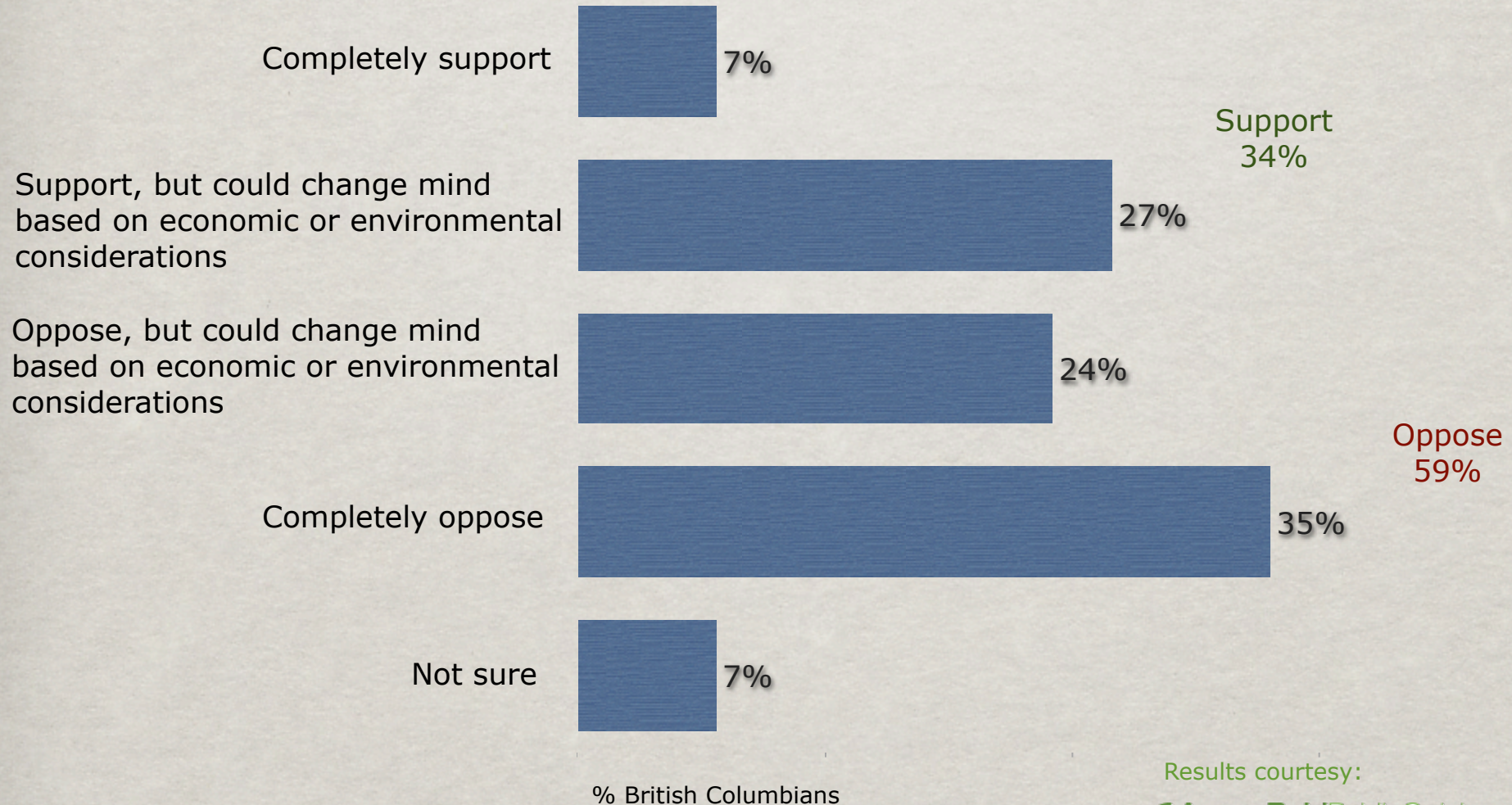




# B.C. PUBLIC SUPPORT FOR NORTHERN GATEWAY PIPELINE

August 1, 2012  
(n=804)

"As you may know, there is a proposal - known as the Enbridge Northern Gateway - to build a new pipeline from Alberta to British Columbia's north coast, to export oil on tankers to China. From what you have seen, read or heard do you support or oppose this proposal?"



Results courtesy:

**AngusReidPublicOpinion**  
A VISIONCRITICAL Practice

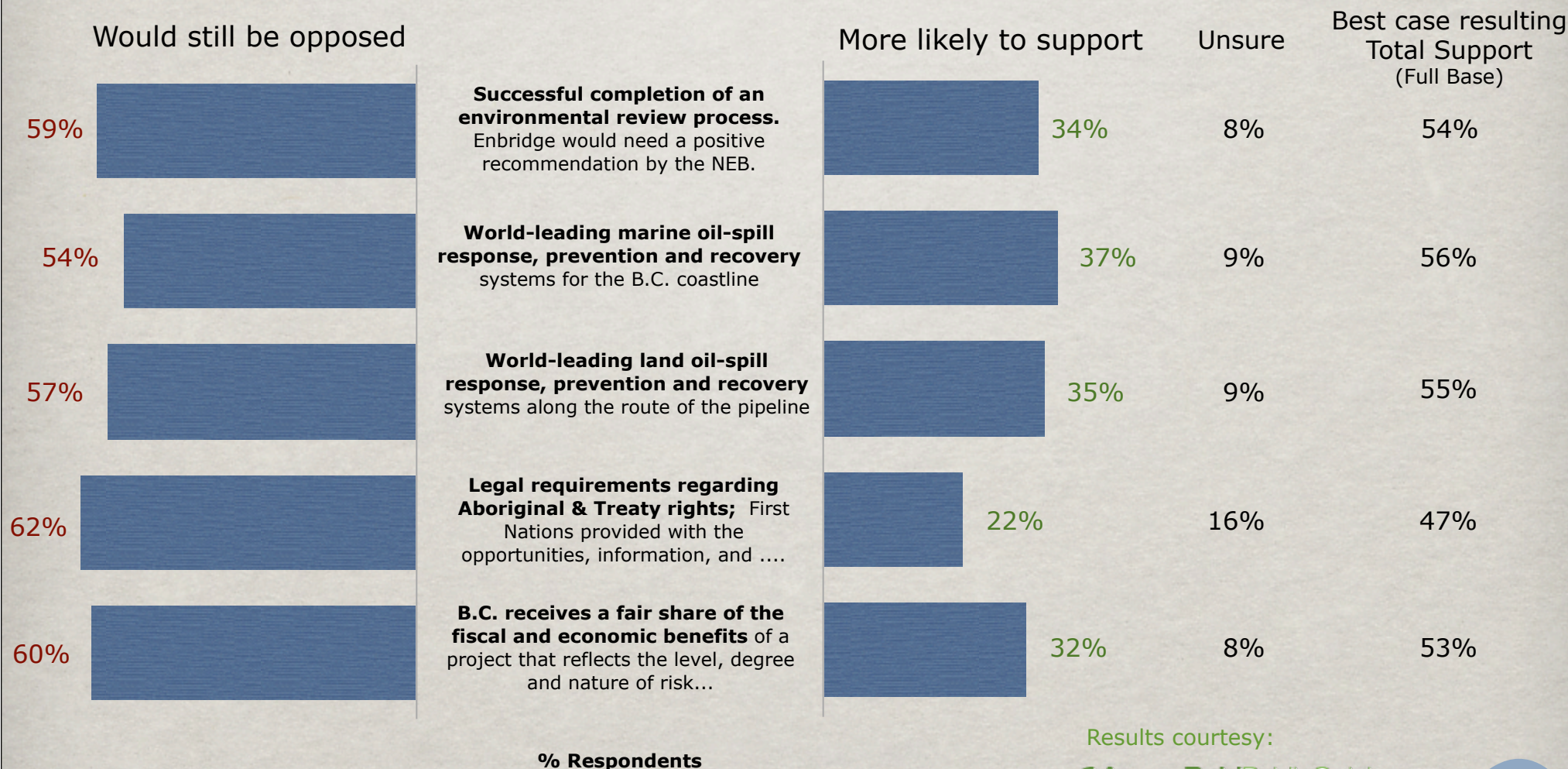


# BC OPPOSITION NORTHERN GATEWAY REACTS TO 5 CONDITIONS

August 1, 2012  
(n=804)

"As you may know, the Government of British Columbia has introduced 5 bottom-line requirements that must be met for British Columbia to consider support of any heavy oil pipeline project. Would meeting each of these requirements change your views on the proposed Northern Gateway project?"

## AMONG BC RESIDENTS OPPOSED TO NORTHERN GATEWAY PIPELINE



Results courtesy:

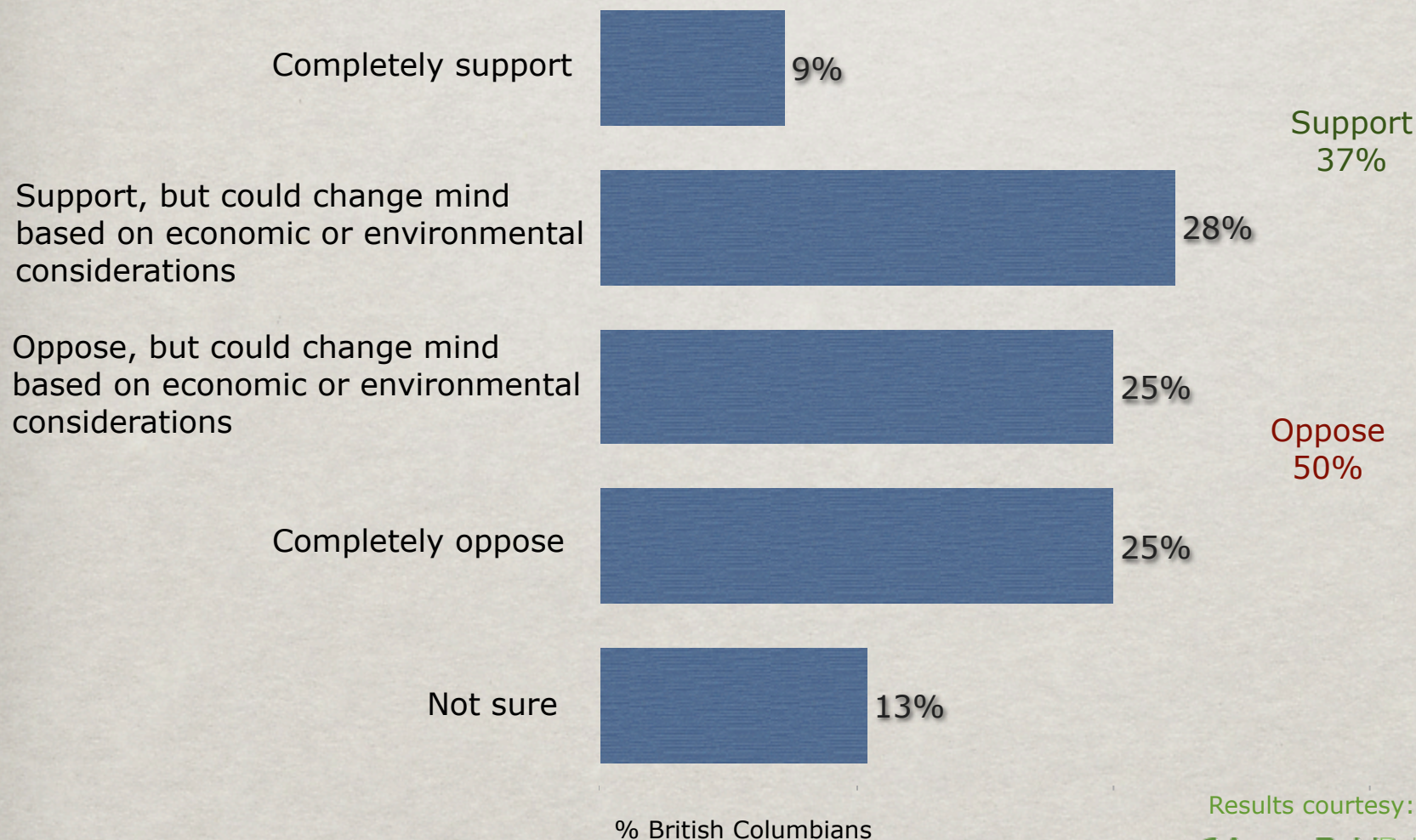
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A VISIONCRITICAL Practice



# B.C. PUBLIC SUPPORT FOR KINDER MORGAN PIPELINE

August 1, 2012  
(n=804)

"As you may know, there is a proposal to expand the capacity of an existing Kinder Morgan pipeline that carries oil from Alberta to Vancouver Harbour. From what you have seen, read or heard do you support or oppose this proposal?"



Results courtesy:

**Angus Reid Public Opinion**  
A VISIONCRITICAL Practice



# B.C. ATTITUDES TOWARD OIL TANKERS ON THE NORTH-CENTRAL COAST

August 1, 2012  
(n=804)

"As you may know, there has been a moratorium on offshore oil and gas exploration and drilling in the north and central coast of British Columbia since the 1970s. Some people interpret this moratorium as a ban on oil tankers in the north and central coast, while others do not. Thinking about this, which of these options comes closest to your own point of view?"

Oil tankers should **definitely be allowed** in BC's north and central coast

7%

Allow Tankers  
35%

Oil tankers should **probably be allowed** in BC's north and central coast

28%

Oil tankers should **probably be banned** in BC's north and central coast

21%

Don't Allow Tankers  
51%

Oil tankers should **definitely be banned** in BC's north and central coast

30%

Not sure

14%

% British Columbians

Results courtesy:

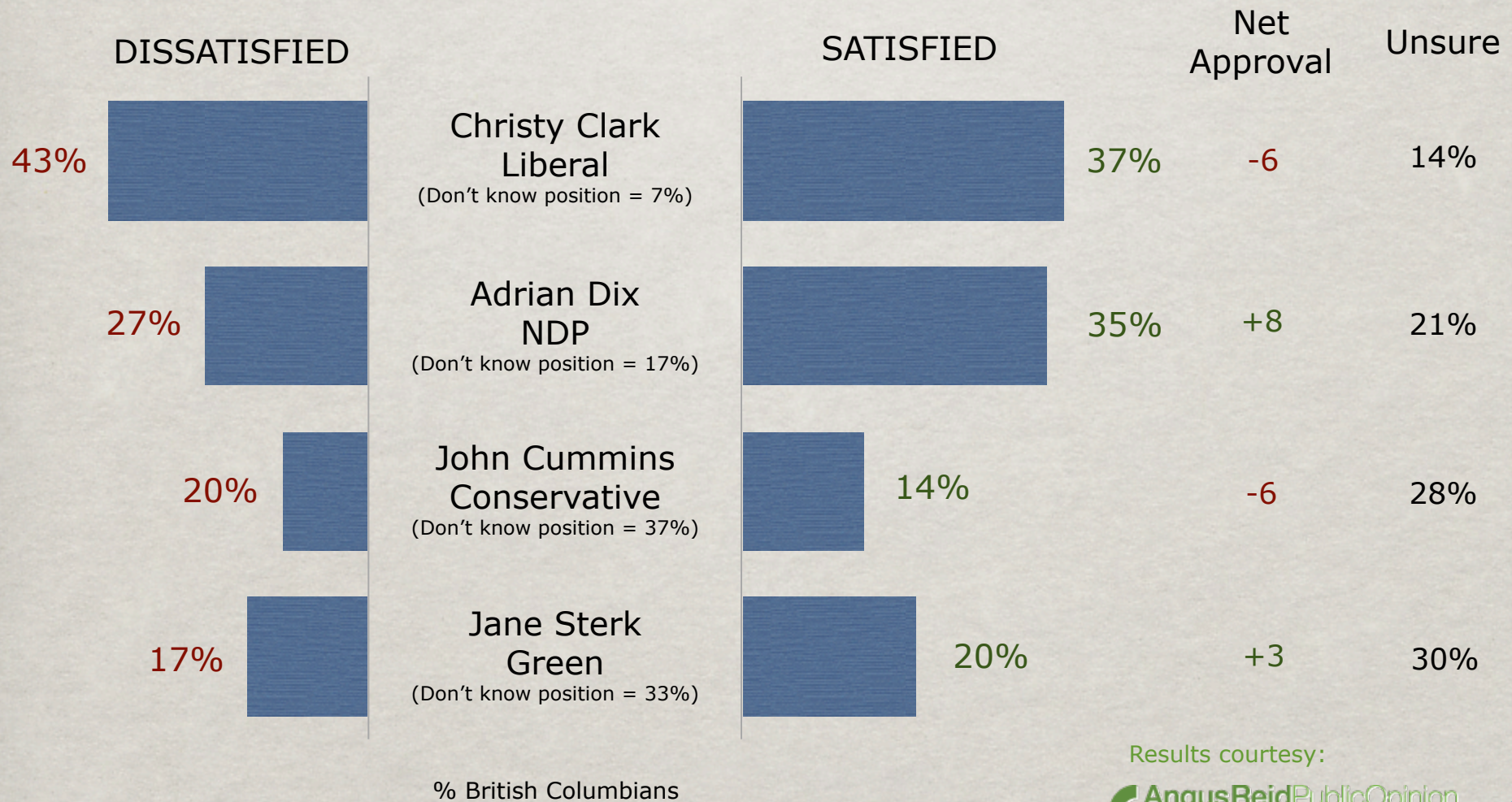
AngusReidPublicOpinion  
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# BC VOTERS EVALUATE PARTY LEADERS' STANCES ON PIPELINES

August 1, 2012  
(n=804)

"When it comes to the issue of pipelines in British Columbia, are you satisfied or dissatisfied with the stance taken by the four major party leaders?"



Results courtesy:

AngusReidPublicOpinion  
A VISIONCRITICAL Practice





# Political Scan in British Columbia

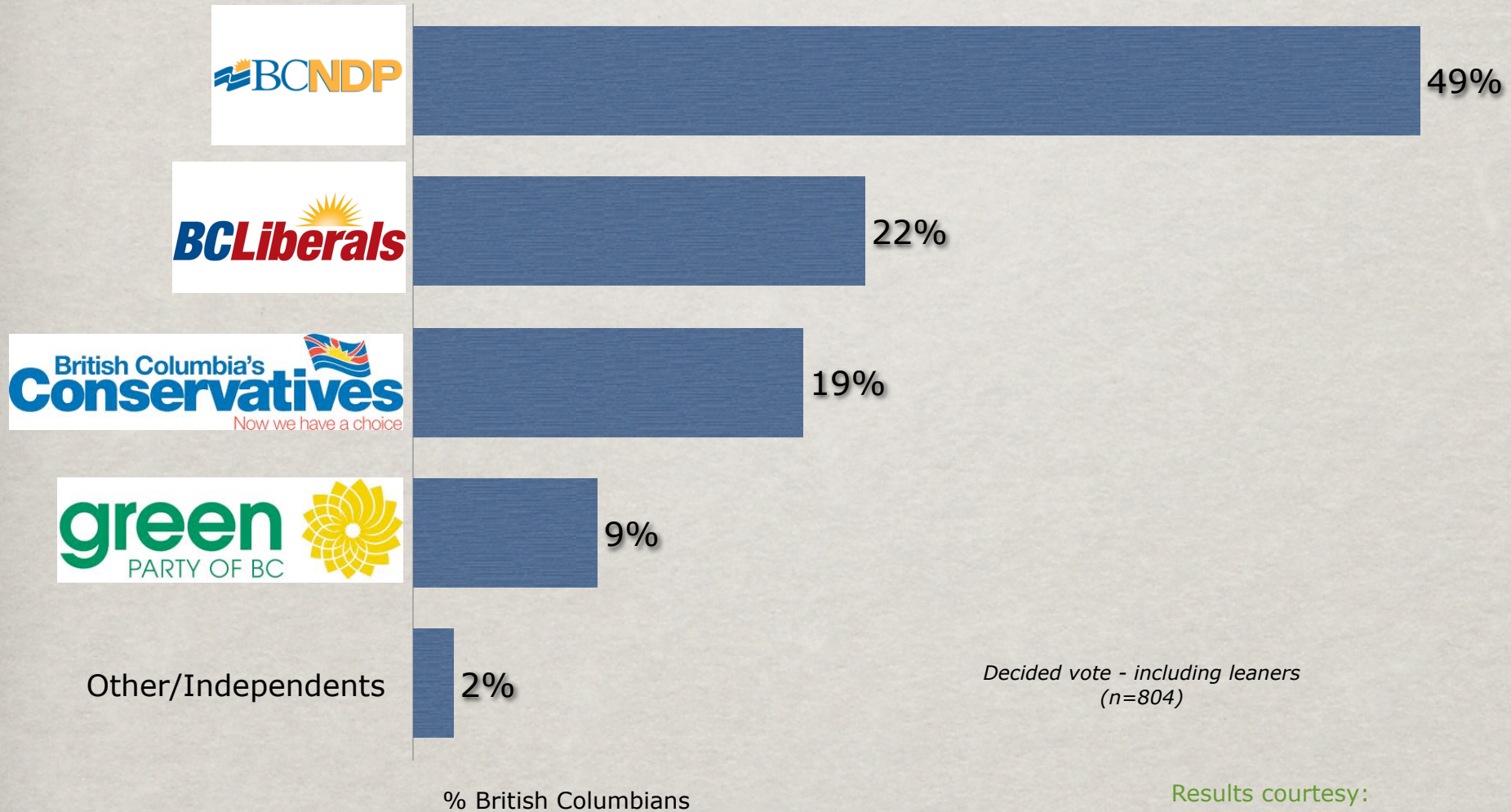




# POLITICAL HORSERACE IN BC

(AUGUST 2012)

"If a provincial election were held tomorrow in British Columbia, which one of the following parties would you be most likely to support in your constituency?"



Results courtesy:

AngusReidPublicOpinion  
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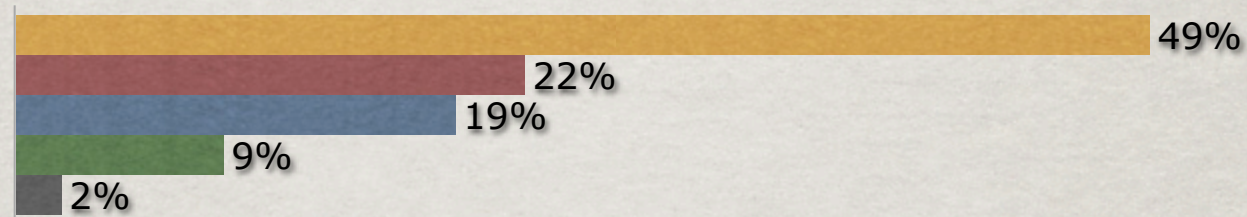
# POLITICAL HORSERACE IN BC

(AUGUST 2012)

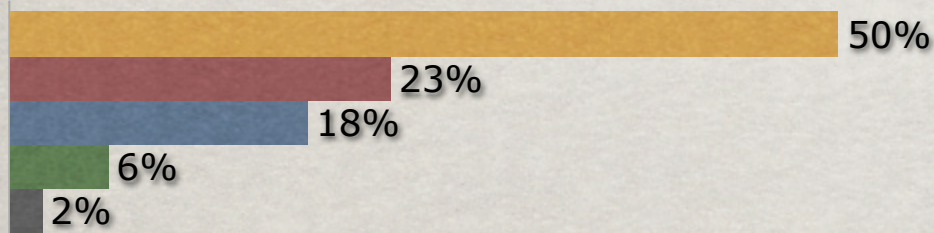
"If a provincial election were held tomorrow in British Columbia, which one of the following parties would you be most likely to support in your constituency?"

NDP Liberal Conservative Green Other

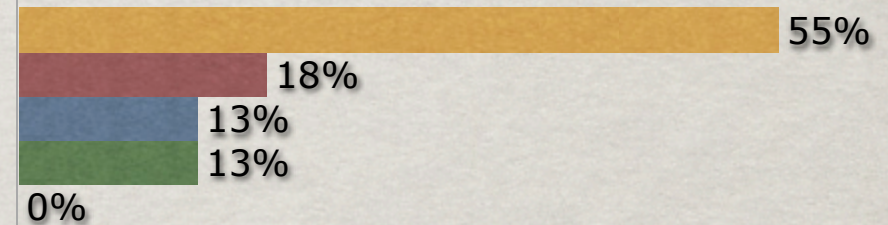
## BC Province-wide



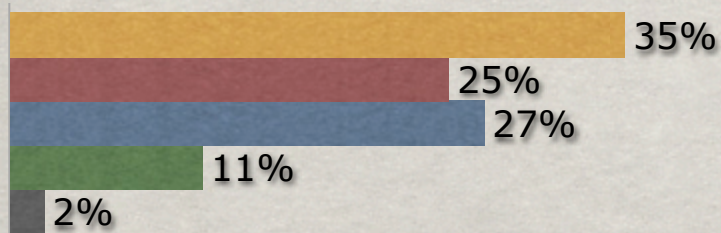
## Metro Vancouver



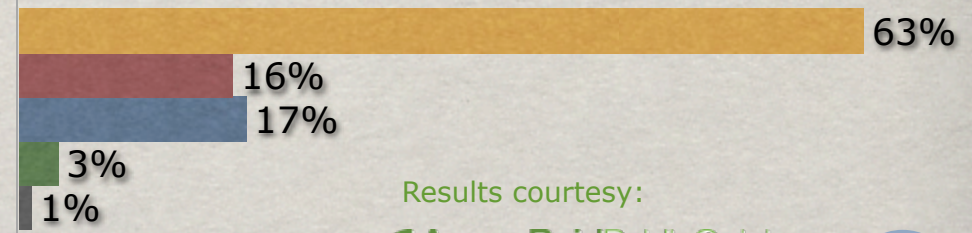
## Vancouver Island



## Interior



## North



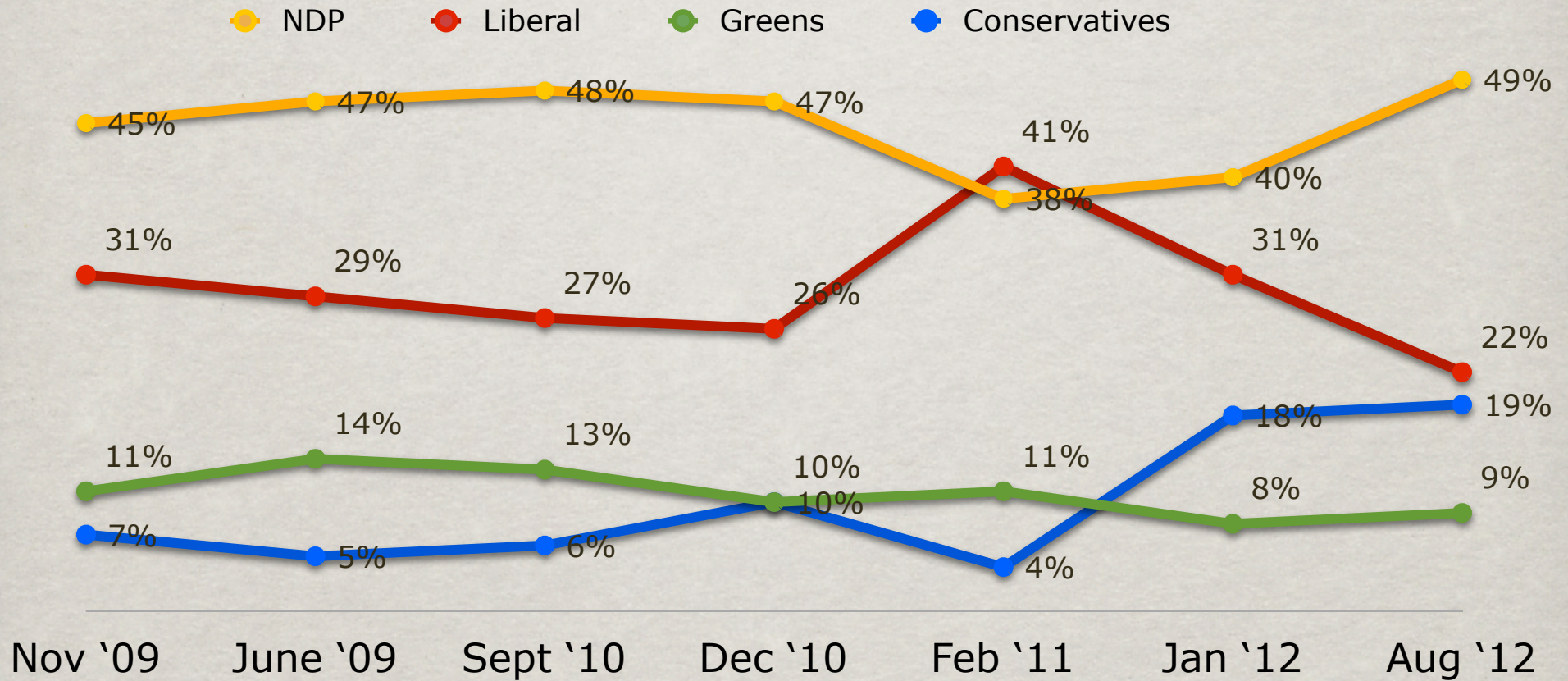
Results courtesy:

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# POLITICAL HORSERACE IN BC TRACKING

"If a provincial election were held tomorrow in British Columbia, which one of the following parties would you be most likely to support in your constituency?"



Results courtesy:

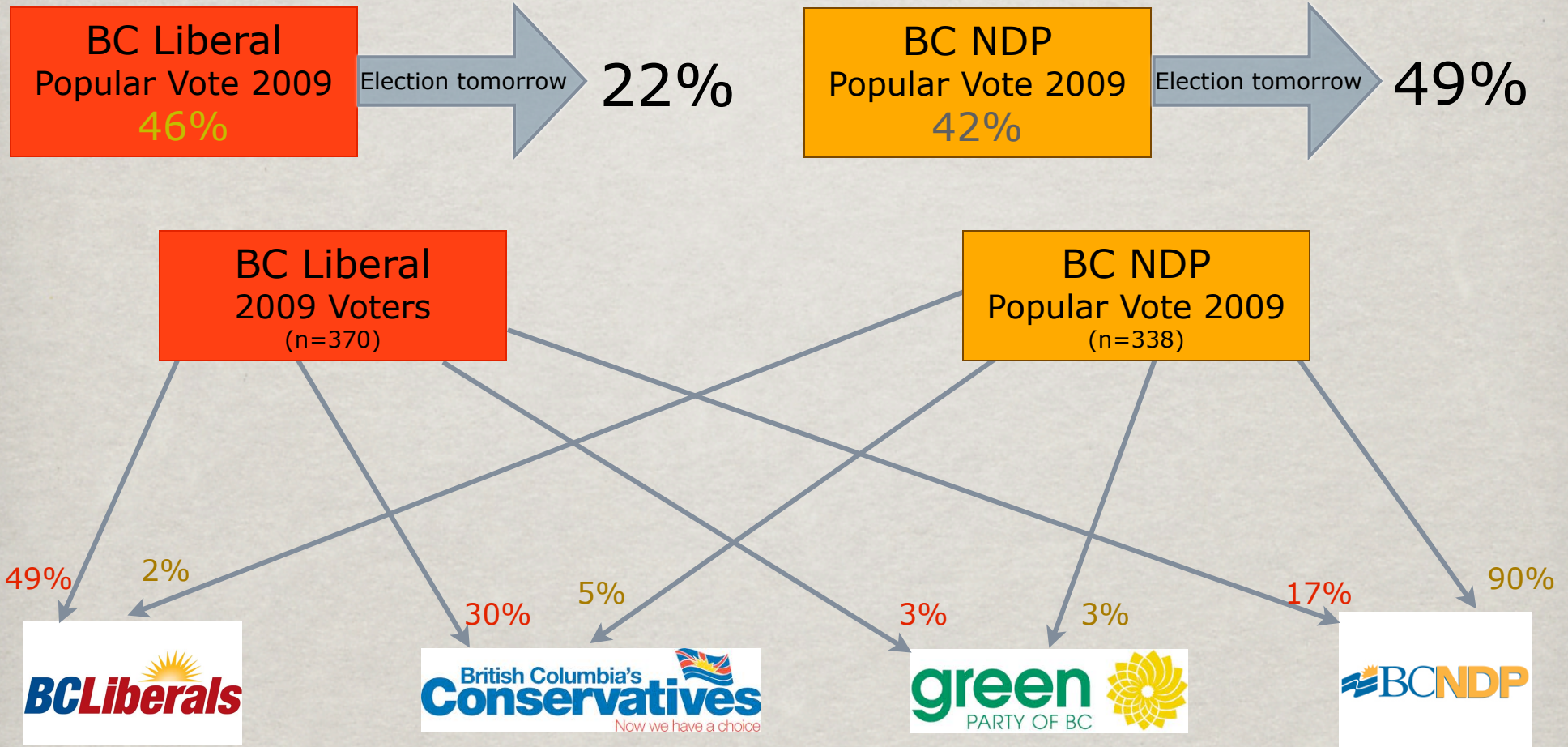
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# SHIFTING POLITICAL SUPPORT IN BC

(AUGUST 2012)



Results courtesy:

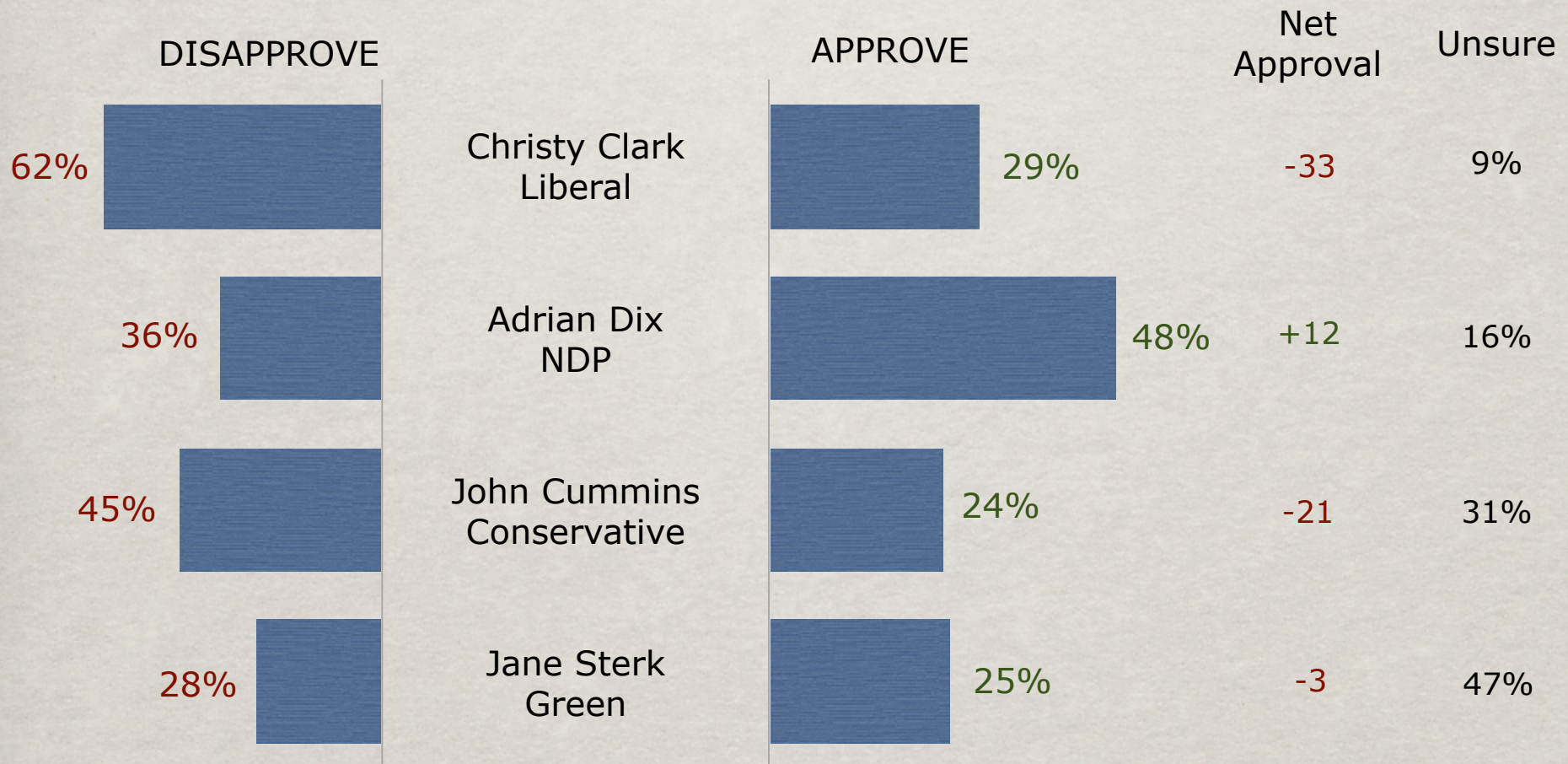
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# BC VOTERS EVALUATE PARTY LEADERS

(AUGUST 2012)

"Do you approve or disapprove of the performance of each of the following people?"



% British Columbians  
(n=804)

Results courtesy:

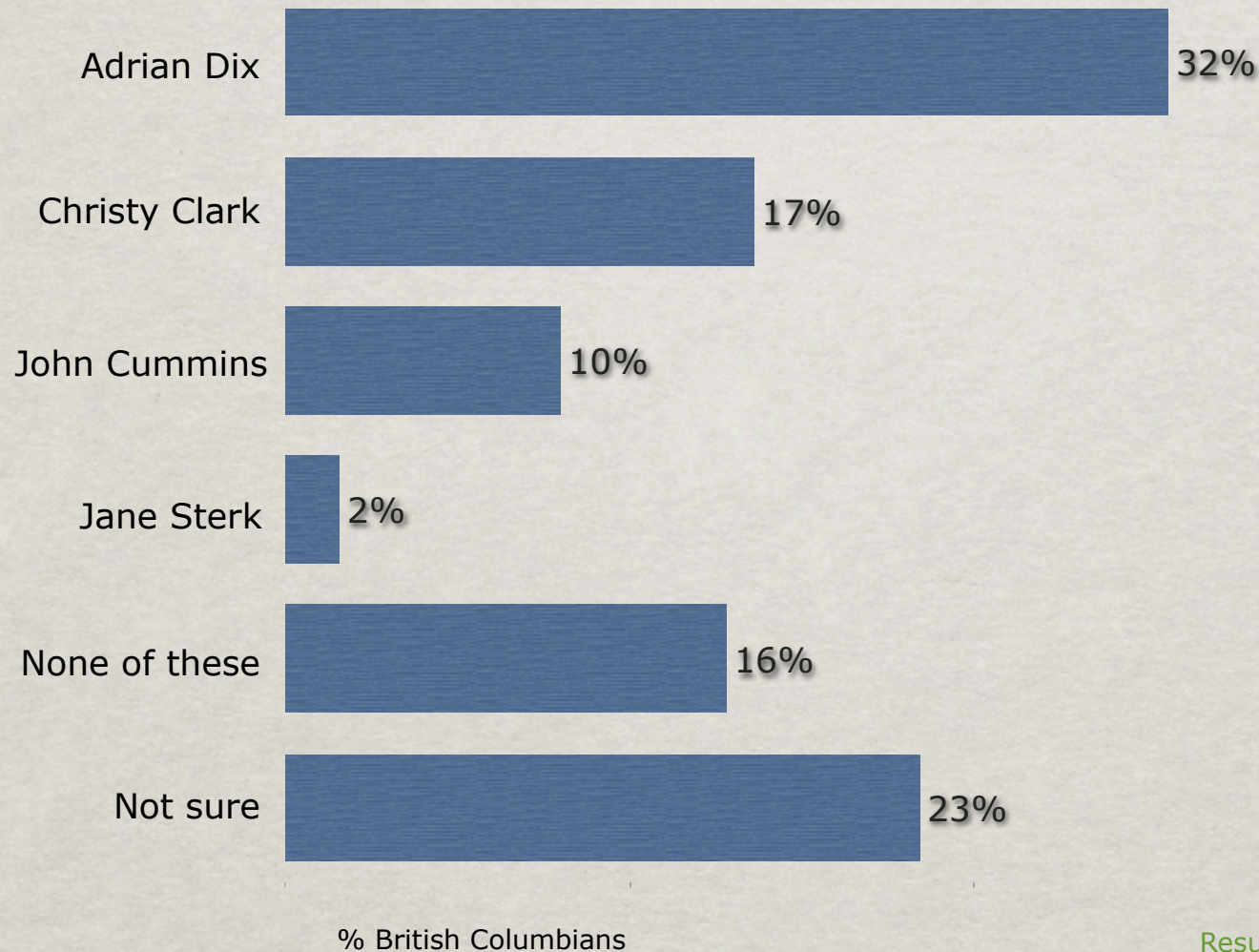
**AngusReid** Public Opinion  
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# B.C. VOTERS CHOOSE BEST PREMIER

August 1, 2012  
(n=804)

"Which of these leaders would make the best Premier of British Columbia?"



Results courtesy:

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# EYE ON ALBERTA

August 2012

## ALBERTA'S POLITICAL LANDSCAPE

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