



Québec – Alberta Relations

March 15, 2011
Project 12063-021



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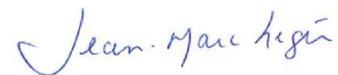
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Nous sommes fiers de vous présenter ce rapport de recherche qui a été réalisé selon les normes rigoureuses de qualité de notre entreprise et de l'Association canadienne de recherche et d'intelligence marketing (ARIM). Nous sommes persuadés que cela répondra à vos préoccupations et nous espérons avoir le privilège de vous servir de nouveau dans un avenir rapproché.



Jean-Marc Léger
Président

CONTEXTE
ET OBJECTIFS



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contexte
objectifs



CONTEXTE ET OBJECTIFS

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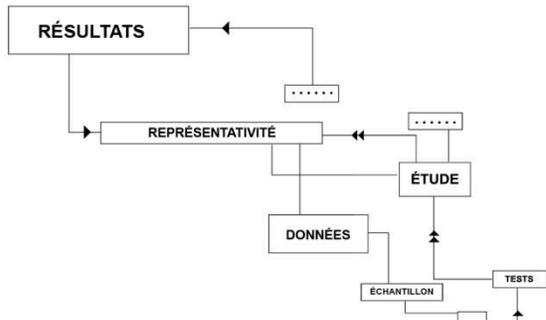
Relationships between Québec and Alberta

The purpose of this study is to measure Quebecers' perceptions of Alberta and of the relationships between the two provinces.

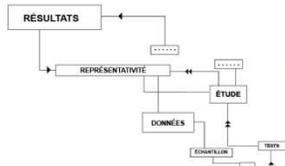
The Montreal Economic Institute (MEI) commissioned the Leger Marketing firm to conduct a study with the population of Québec for the purpose of determining Quebecers' perceptions of Alberta and of the relationships between the two provinces.

The objectives of this study are as follows:

- To establish which province is perceived as Québec's best ally among the Canadian provinces according to the population of Québec;
- To determine the perception (positive or negative) that Quebecers have of Alberta;
- To evaluate the level of agreement of Quebecers regarding Alberta's contribution to the defence of provincial rights with respect to the federal government;
- To determine Quebecers' opinion of whether Alberta's prosperity – partially a result of exploiting the oil sands – is profitable for Québec;
- To evaluate to what extent the population of Québec would like Québec to develop its economic and political relationships with Alberta;
- To establish Quebecers' level of agreement with whether Québec should take advantage of Albertan expertise to develop its own oil and gas resources;
- To determine the population's opinion of the likelihood that Québec will completely eliminate its dependence on oil in the next 20 years;
- To evaluate which approach Quebecers find most appropriate to produce oil by developing the oil sands.



MÉTHODOLOGIE



MÉTHODOLOGIE

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This study was conducted over the phone from **February 21 to March 6, 2011** with **1,000 respondents** 18 and over, in all regions of Québec.

The survey's final data was weighted according to age, gender, mother tongue, level of education, household composition (with or without children) and region in order to guarantee a representative sample of the Québec population.

A probabilistic sample of this size has a margin of error of **+/- 3.1%**, 19 times out of 10.

In the tables presented, data in **bold red** indicate a significantly higher proportion than those for other respondents. Inversely, data in **bold blue** indicate a significantly lower proportion than those for other respondents.



**CONCLUSIONS
STRATÉGIQUES**



CONCLUSIONS STRATÉGIQUES

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Quebeckers generally have a positive image of Alberta.

Quebeckers generally have a positive image of Alberta, but do not think that Québec benefits from this province's prosperity

- Six Quebeckers out of ten (61%) have a positive image of Alberta, while 27% have a negative image of this province.
- Alberta's prosperity is not profitable for Québec according to half of Quebeckers (49%), while a third (34%) consider that Québec benefits from this prosperity.

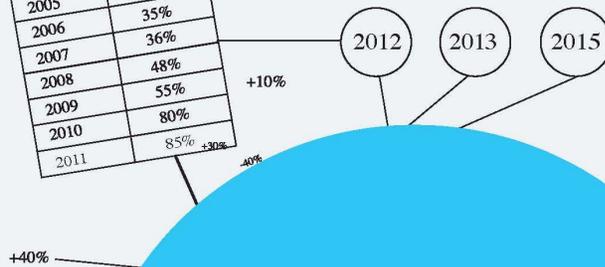
Alberta as Québec's ally

- Spontaneously, 10% of Québec's population see Alberta as Québec's best ally when it comes to defending provincial autonomy, after Ontario (27%) and New Brunswick (13%). It should be noted that 15% do not see any Canadian province as Québec's ally in defending provincial autonomy and that 27% do not have an opinion.
- The alliance between Québec and Alberta has contributed to protecting the characteristics of each Canadian region from the federal government according to half of Quebeckers (51%), while 28% indicated the opposite, and 21% did not answer this question.
- A majority of Quebeckers (68%) feel that Québec should develop its economic and political relations with Alberta.

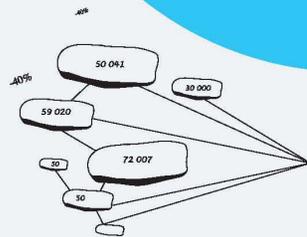
Quebeckers support exploiting the oil sands, as long as continuous effort is made to limit the environmental impact

- Seventy-one percent (71%) of Quebeckers consider that the oil sands should be developed as long as continuous effort is made to limit the environmental impact, while 15% consider that the development of the oil sands should be stopped altogether.
- Six Quebeckers out of ten (62%) think that Québec should take advantage of Alberta's expertise to develop its own oil and gas resources.
- Québec will not be able to completely eliminate its dependence on oil over the next 20 years according to more than half of Quebeckers (56%), while one third of them (35%) consider this possible.

2005	25%
2006	35%
2007	36%
2008	48%
2009	55%
2010	80%
2011	85%



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Québec's Best Ally among the Canadian Provinces

According to Quebecers, Québec's best ally among the Canadian provinces is Ontario (27%), followed by New Brunswick (13%) and Alberta (10%).

Question 2 – For several years, Québec has been asking for more autonomy from the federal government. When it comes to defending provincial autonomy, which province is Québec's best ally among the Canadian provinces?

	Total (n=1 000)	LPQ Voters (n=206)	PQ Voters (n=284)	ADQ Voters (n=75)
Ontario	27%	35%	25%	24%
New Brunswick	13%	13%	18%	9%
Alberta	10%	12%	8%	20%
British Columbia	4%	3%	7%	5%
Newfoundland	2%	1%	2%	4%
Manitoba	1%	1%	1%	0%
Nova Scotia	1%	1%	1%	1%
Saskatchewan	0%	0%	0%	3%
Prince Edward Island	0%	0%	0%	3%
None	15%	12%	15%	19%
Don't know	27%	22%	23%	12%



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Alberta's Image among Quebeckers

More than half of Quebeckers (61%) have a positive image of Alberta, while 27% have a negative image of this province.

Quebeckers' general perception of Alberta is positive, especially among Liberal Party voters (72%) and ADQ voters (73%), as well as among people whose household income is above \$100,000 per year (70%).

Men (32% vs. 23% of women) and Francophones (30% vs. 16% non-Francophones) are proportionately more likely to have a negative perception of Alberta.

Question 2 – Would you say your general perception of Alberta is very positive, somewhat positive, somewhat negative or very negative?

	Total (n=1 000)	LPQ Voters (n=206)	PQ Voters (n=284)	ADQ Voters (n=75)
TOTAL POSITIVE	61%	72%	59%	73%
Very positive	10%	15%	7%	16%
Somewhat positive	51%	57%	52%	57%
TOTAL NEGATIVE	27%	20%	34%	21%
Somewhat negative	20%	16%	28%	19%
Very negative	7%	4%	6%	2%
Don't know / refusal	12%	8%	7%	6%



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The Alliance between Québec and Alberta in Defending Provincial Rights from the Federal Government

Half of Quebeckers (51%) are of the opinion that the alliance between Québec and Alberta has contributed to protecting the characteristics of each Canadian region from the federal government, while 28% disagree with this affirmation and 21% did not answer this question.

Liberal Party (58%) and ADQ (63%) voters are proportionately much more likely to agree with the affirmation that the alliance between Alberta and Québec has contributed to protecting the characteristics of each region within the Canadian federation. University graduates (33%) and PQ voters (33%) are significantly more likely to disagree with this affirmation.

*Question 3A – Do you agree or disagree with the following statements?
Québec and Alberta are staunch allies in defending the rights of provinces from the federal government, and this alliance has helped protect the characteristics of each region.*

	Total (n=1 000)	LPQ Voters (n=206)	PQ Voters (n=284)	ADQ Voters (n=75)
TOTAL AGREE	51%	58%	55%	63%
Strongly agree	13%	15%	14%	18%
Somewhat agree	38%	43%	41%	45%
TOTAL DISAGREE	28%	22%	33%	30%
Somewhat disagree	19%	13%	23%	18%
Strongly disagree	9%	9%	10%	12%
Don't know / refusal	21%	20%	12%	7%



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Alberta's Prosperity and Québec

Around half of Quebeckers (49%) think that Alberta's prosperity – partially a result of exploiting the oil sands – is not profitable for Québec, while a third (34%) think that Québec benefits from this prosperity.

PQ voters (58%), professionals (56%) and Francophones (52%) are significantly more likely to think that Alberta's prosperity is not profitable for Québec, while a majority of ADQ voters (56%) are of the opinion that Québec is benefitting from this province's prosperity. Liberal Party voters are divided on this question since 40% consider that Alberta's prosperity is profitable for Québec and 43% think otherwise.

*Question 3B – Do you agree or disagree with the following statements?
Alberta's prosperity - partially a result of exploiting the oil sands - is profitable for Québec*

	Total (n=1 000)	LPQ Voters (n=206)	PQ Voters (n=284)	ADQ Voters (n=75)
TOTAL AGREE	34%	40%	32%	56%
Strongly agree	10%	8%	8%	30%
Somewhat agree	24%	32%	24%	26%
TOTAL DISAGREE	49%	43%	58%	36%
Somewhat disagree	28%	25%	33%	18%
Strongly disagree	21%	18%	25%	18%
Don't know / refusal	17%	17%	10%	8%



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Developing Political and Economic Relationships between Alberta and Québec

More than two-thirds of Quebeckers (68%) think that Québec must develop its economic and political relationships with Alberta.

The assertion that Québec must develop its economic and political relations with Alberta obtains significantly higher support among Liberal Party (74%) and ADQ (81%) voters.

*Question 3C – Do you agree or disagree with the following statements?
Québec must develop its economic and political relationships with Alberta*

	Total (n=1 000)	LPQ Voters (n=206)	PQ Voters (n=284)	ADQ Voters (n=75)
TOTAL AGREE	68%	74%	65%	81%
Strongly agree	24%	33%	24%	40%
Somewhat agree	43%	42%	41%	41%
TOTAL DISAGREE	22%	16%	30%	9%
Somewhat disagree	15%	10%	21%	7%
Strongly disagree	8%	6%	9%	2%
Don't know / refusal	10%	9%	5%	10%



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Alberta's Technical Expertise to Develop Québec's Oil and Gas Resources

Nearly two-thirds of Quebeckers (62%) think that Québec must take advantage of Alberta's technical expertise in order to develop its own oil and gas resources.

Generally, Quebeckers consider that Québec must take advantage of Alberta's technical expertise in order to develop its own oil and gas resources. This statement's approval rate is significantly higher among Liberal Party voters (71%).

Question 3D – Do you agree or disagree with the following statements?

Québec must take advantage of Alberta's technical expertise in order to develop its own oil and gas resources.

	Total (n=1 000)	LPQ Voters (n=206)	PQ Voters (n=284)	ADQ Voters (n=75)
TOTAL AGREE	62%	71%	62%	71%
Strongly agree	26%	34%	23%	48%
Somewhat agree	37%	37%	40%	23%
TOTAL DISAGREE	28%	20%	32%	24%
Somewhat disagree	17%	14%	21%	15%
Strongly disagree	11%	6%	12%	9%
Don't know / refusal	9%	9%	4%	5%



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Québec Freeing itself from Its Dependence on Oil

More than half of Quebecers (56%) think that Québec will not be able to completely eliminate its dependence on oil over the next 20 years, while a third of them (35%) think this is possible.

Quebeckers' optimism towards Québec completely eliminating its dependency on oil within the next 20 years varies according to the generations: people between 55 and 64 (42%) and over 65 (45%) are significantly more optimistic, while young people between 18 and 24 (71%) are generally pessimistic, as are people between 35 and 54 (62%).

Question 3E – Do you agree or disagree with the following statements?
Québec could completely eliminate its dependence on oil within the next 20 years

	Total (n=1 000)	18-24 (n=39)	25-34 (n=128)	35-44 (n=171)	45-54 (n=230)	55-64 (n=203)	65 or older (n=215)
TOTAL AGREE	35%	24%	38%	30%	30%	42%	45%
Strongly agree	13%	4%	14%	13%	10%	17%	19%
Somewhat agree	22%	20%	24%	17%	20%	25%	26%
TOTAL DISAGREE	56%	71%	57%	62%	62%	50%	39%
Somewhat disagree	34%	36%	34%	40%	36%	32%	26%
Strongly disagree	22%	35%	23%	22%	26%	18%	13%
Don't know / refusal	9%	5%	5%	8%	8%	8%	16%



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The best approach to producing oil by developing the oil sands according to Quebeckers

The majority of Quebeckers (71%) agree with developing the oil sands as long as a continuous effort is made to limit the environmental impact, while 15% consider that development of the oil sands should be stopped altogether.

Generally, Quebeckers think that the oil sands should be developed as long as a continuous effort is made to limit the environmental impact (71%). These results are comparable to Canadian opinion on this question, according to a Harris Décima study in which 74% share this opinion and 17% think that development of the oil sands should be stopped altogether.

Question 4 – Part of Alberta's current and future wealth is linked to producing oil by developing the oil sands. In your opinion, what is the best approach with this resource?

	Total (n=1 000)	LPQ Voters (n=206)	PQ Voters (n=284)	ADQ Voters (n=75)
To focus on maximizing the economic development of the oil sands	7%	8%	8%	8%
To develop the oil sands with a continuous effort to limit the environmental impact	71%	74%	74%	85%
To stop the development of the oil sands altogether	15%	11%	13%	5%
Don't know	7%	7%	5%	2%



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Provincial Voting Intentions

The Parti québécois has a 6-point lead over the Liberal Party.

Question 1 – If PROVINCIAL elections were held today, for which political party would you be most likely to vote, would it be for...? In the event a respondent did not have an opinion, the following question was asked: Even if you have not yet made up your mind, for which of the following political parties would you be most likely to vote?

Provincial Voting Intentions	Before distribution (n=1 000)	After distribution (n=727)	Franco-phones (n=643)	Other languages (n=81)
... The Parti Québécois	26%	36%	42%	11%
... The Liberal Party of Québec	22%	30%	24%	56%
... Québec solidaire	9%	12%	12%	10%
... Action démocratique du Québec	7%	10%	12%	4%
... The Green Party	5%	7%	6%	14%
Other	4%	5%	4%	5%
Will abstain/Cancel	11%	-	-	-
Don't know	10%	-	-	-
Refusal	6%	-	-	-



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Provincial Voting Intentions according to Québec's Regions

In the Montréal region, the Liberal Party is neck and neck with the Parti québécois (33% of voting intentions respectively).

The Parti Québécois dominates in the rest of the province.

Question 1 – If PROVINCIAL elections were held today, for which political party would you be most likely to vote, would it be for...? In the event a respondent did not have an opinion, the following question was asked: Even if you have not yet made up your mind, for which of the following political parties would you be most likely to vote?

Provincial Voting Intentions	Before distribution (n=1 000)	After distribution (n=727)	MTL GMA (n=321)	Québec City GMA (n=68)	Rest of Québec (n=338)
... The Parti Québécois	26%	36%	33%	38%	39%
... The Liberal Party of Québec	22%	30%	33%	24%	27%
... Québec solidaire	9%	12%	14%	4%	10%
... Action démocratique du Québec	7%	10%	6%	23%	12%
... The Green Party	5%	7%	8%	6%	7%
Other	4%	5%	6%	5%	5%
Will abstain/Cancel	11%	-	-	-	-
Don't know	10%	-	-	-	-
Refusal	6%	-	-	-	-

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