

# Blackened Reputation

## A Year of Coverage of Alberta's Oil Sands

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## OIL SANDS MEDIA MONITORING

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Canada West Foundation's Oil Sands Media Monitoring initiative is a twelve part of a series of reports tracking international coverage of the oil sands through the traditional and internet media in 2009/2010. These media monitors track how the oil sands are being perceived from both an environmental and economic perspective.

All twelve reports are available for download on the Canada West Foundation's website at: [www.cwf.ca/V2/cnt/oil\\_sands](http://www.cwf.ca/V2/cnt/oil_sands)

For more information about the Oil Sands Media Monitoring reports, please contact Dr. Roger Gibbins at ([rgibbins@cwf.ca](mailto:rgibbins@cwf.ca)).

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## INTRODUCTION

The past year was a tumultuous one for oil sands developments in northern Alberta. The global economic crisis initially left proposed oil sands developments reeling, but this was followed by consistent and significant signs of recovery. New projects were started, stalled projects were restarted, and the oil sands became attractive for foreign investors including those from China and South Korea. The US Presidential administration publicly acknowledged the importance of the Canadian oil sands to US energy security, and as concerns mounted about declining conventional oil reserves, Alberta's access to the world's second largest recoverable oil reserve became a more important aspect of the global energy story.

At the same time, the oil sands were subjected to growing environmental attack. Environmental organizations including Greenpeace, the Sierra Club, the Rainforest Action Network and the Pembina Institute crusaded globally against the oil sands, drawing attention to their carbon footprint, water consumption, and impact on Aboriginal communities and Canada's boreal forest. The tailings ponds associated with oil sands mining became the industry's most visible and notorious symbol as the proponents of oil sands development competed with the brutal effectiveness of photos showing vast mining sites and dying ducks. Through conventional media and, more importantly, through re-posting on the growing number of environmental websites, news of anti-oil sands protests or research reports spread faster and farther than did defences of the oil sands from industry or government. The benefits of the oil sands to Canada's economy and North American energy security were certainly covered in the media, but proponents of development were clearly on the defensive throughout most of the year.

In short, the oil sands became a major and complex media story, one with important implications for their development and indeed for the North American energy mix. The Canada West Foundation tracked this story from May 2009 to April 2010 through monthly *Oil Sands Media Monitor* reports (All monthly reports are available for download at [www.cwf.ca/V2/cnt/oil\\_sands](http://www.cwf.ca/V2/cnt/oil_sands)) that examined how Alberta's oil sands were being portrayed in the Canadian, international and Internet media. *Blackened Reputation* pulls together those twelve reports and identifies broad patterns in media coverage that may have been obscured by inevitable monthly variations in the previous reports.

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## METHODOLOGY

The media monitoring process for *Blackened Reputation* used the Google search engine's Google Alerts feature. Each day from May 2009 through April 2010, the Google engine searched the Internet for English-language stories related to the key words "oil sands," "oilsands," "tar sands" and "tarsands." Given that the vast majority of sites criticising the oil sands use the more pejorative term "tar sands," the "tar" terms were included in the search in order to ensure a more complete snapshot of media coverage. Also included in the search was the French term for oil sands, "sables bitumineux," in order to bring in stories from the French language media, primarily in Quebec.

This process collected approximately 11 stories a day, or 335 a month, for a total of 4,015.<sup>1</sup> Stories were gathered from blogs, environmental and economic websites, and media outlets reaching audiences around Canada and the world. Our coverage, therefore, reached well beyond such conventional outlets as the *Globe and Mail* and *New York Times* to include emergent media forms that are coming to play such an important role in policy commentary, particularly with respect to environmental issues.

The stories were analyzed and broken into two categories: environmental and economic. Stories that portrayed the oil sands in a positive light through their contribution to the Canadian economy, value for energy security or advances in efficiency, or stories in which corporations and governments defend the development of the oil sands, were classified as "positive." Stories whose focus was on the costs of oil sands development including carbon emissions, water use, job loss or falling stock prices, or stories that called attention to such costs without also presenting the benefits of the oil sands, were classified as "negative." Stories that discussed the oil sands without comment on their costs or benefits, or which discussed both equally, were classified as "neutral."

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<sup>1</sup> The total of 4,015 has to be treated with some caution as identical or near identical stories could appear on different sites. For example, there were 25 stories in the Canadian media in March 2010 about the trial of Syncrude for duck deaths in its tailing ponds. The story was carried through CBC, CTV, the *Globe and Mail*, and *National Post*, newspapers throughout Alberta and BC, the *New York Times*, and a local newspaper in the United Arab Emirates. The trial story, therefore, constitutes much more than a single entry in the total of 4015 media stories, or hits. In addition, some stories mentioned the oil sands only in passing.

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## START WITH THE NUMBERS

What, then, was the picture to emerge when over 4000 data points were brought into focus? Let's begin with the raw numbers and broad patterns before looking more closely at the stories behind the numbers (see Appendix for a complete month-by-month breakdown):

- ▶ The development of the oil sands was a bigger Canadian story than it was an international story, but an even larger internet media story: 53.3% of all stories were found on the web media (which includes Canadian sites), 37.1% in the conventional Canadian media, and only 9.6% in the conventional, English language international media (predominantly US).
- ▶ Overall, the media coverage was negative but not overwhelmingly so: of all the stories, 54.6% were negative, 31.4% positive, and 14.0% neutral.
- ▶ Negative stories were found most frequently on the web media where 62.1% of the stories were negative compared to 46.9% of the international stories and 46.0% of the Canadian stories.
- ▶ Environmental stories outnumbered economic stories by a margin of 2 to 1 (67.3% to 32.7%). Not surprisingly, the environmental stories were largely although not entirely negative (70.9%), whereas the economic stories were largely positive (61.1%) and more rarely negative (21.2%).
- ▶ The Canadian media coverage of the oil sands focused more on environmental stories than did either the international or web media; the ratio of environmental stories to economic stories was 4.1 in the Canadian media, 2.6 in the web media, and only 1.2 in the international media.
- ▶ Of all the negative stories collected over the twelve month period, 60.5% were found in the web media, 31.2% in the conventional Canadian media, and only 8.2% in the conventional international media. In other words, the oil sands received significantly more negative coverage at home than abroad.

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The bottom line? Certainly the oil sands received a good deal of media coverage over the past year. This coverage was generally but not overwhelmingly negative, with largely negative environmental coverage offset to a degree by largely positive economic coverage. Negative coverage was most apparent in the web media, where ENGOs are very active players; it was least evident in the conventional international media. However, negative media coverage stopped well short of a tidal wave, and both the extent and negativity of international coverage may be exaggerated by Canadian opponents of oil sands development. Negative environmental stories in the Canadian media outnumbered those in the international media by a ratio of four to one. Oil sands development was a big story, largely an environmental story, but not one that gripped media attention at home or abroad.<sup>2</sup>

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<sup>2</sup> Although the Canadian press ran almost 2 negative stories a day, month in and month out, these were dispersed across scores of Canadian media outlets. It was not the case that individual media outlets presented unrelentingly negative environmental news.



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## STORIES BEHIND THE NUMBERS

Most media coverage is not driven by investigative journalism whereby journalists, working within either the conventional or internet media, initiate the coverage. Instead, coverage tends to be event driven, and then reflects the frame that media sources wrap around specific events. Over the 12 months covered by *Blackened Reputation*, the following stories dominated *environmental* coverage of the oil sands (for a detailed discussion of these stories and how they played out, see the monthly *Oil Sands Media Monitor* reports (All reports are available for download at [www.cwf.ca/V2/cnt/oil\\_sands](http://www.cwf.ca/V2/cnt/oil_sands)):

- ▶ Greenpeace protests at oil sands sites in northern Alberta.
- ▶ Reports and studies released during the year from a variety of groups including the Alberta Energy Research Institute, Cambridge Energy Research Associates (CERA), Conference Board of Canada, Council on Foreign Relations, Global Forest Watch, Greenpeace, Pembina Institute, Saskatchewan Environmental Society, the World Wildlife Fund, and the KAIROS delegation of church leaders.
- ▶ Films released during the year, including the Academy Award-winning *Avatar*,<sup>3</sup> *Tar Nation* (produced by the Polaris Institute) and the British documentary *Dirty Oil*.
- ▶ Regulatory hearings and related protests associated with new pipelines for the transportation of bitumen.

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3 When *Avatar* began its reign at the box office in December 2009, environmentalists were quick to point out similarities between the giant pit mines plaguing the fictitious world of Pandora and bitumen extraction processes in Alberta. Pandoran mines used machinery that was formerly used (and critics of these comparisons were quick to point out the "formerly") in the oil sands. The comparison between *Avatar* and the oil sands spread in February as environmentalists used the upcoming Academy Awards to call further attention to the oil sands, and when *Avatar's* Oscar-winning art director stated that he based some of his designs on oil sands operations. The *Avatar* comparison drew fire from the oil industry which objected to a fictional story set on an imaginary planet being used to attack a real world industry. In total there were 36 stories about the linkage between *Avatar* and the oil sands, of which only 5 were in defence of the oil sands.

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  - ▶ State and federal legislative initiatives in the United States, most notably the proposed Waxman-Markley Clean Energy and Security Act.
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  - ▶ Protests directed at financial institutions with oil sands investments (e.g., RBC, Royal Bank of Scotland).
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  - ▶ Shareholder meetings (RBC, Stat Oil, Total) where firms were urged to divest themselves of oil sands holdings.<sup>4</sup>
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  - ▶ Protests encouraging non-Canadian firms to wind down their engagement in the oilsands.<sup>5</sup>
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  - ▶ International events that provided a platform for oil sands protests; some were directly related to oil sands production (e.g., the UN COP15 Climate Change Conference in Copenhagen<sup>6</sup>) and others less so (e.g., the 2010 Winter Olympics, whose organizers were accused of “greenwashing” the event).
  - ▶ Protests directed at foreign governments.<sup>7</sup>
  - ▶ Consumer boycotts.
  - ▶ Speeches by prominent political actors (e.g., Al Gore’s hyperbolic statement that the oil sands “threaten our survival as a species,” supportive statements by Liberal leader Michael Ignatieff, and

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4 In April and May of 2010, environmentalists including FairPensions, a company espousing “responsible investment,” tabled motions at the annual general meetings of BP and Shell demanding a full account of the risks involved in oil sands development. Although defeated, these motions were successful in attracting media attention.

5 In April of 2010 London Rising Tide/London Tar Sands Network spent two weeks in the United Kingdom targeting British company BP for what was called the “Fortnight of Shame.” (The two weeks of protest against BP preceded the company’s massive undersea oil leak in the Gulf of Mexico, and were entirely directed against their investments in the oil sands.)

6 For the entire conference, protests of all shapes and sizes, most of which targeted the oil sands, raged throughout Copenhagen and extended to the Canadian embassy in London and the Canadian Parliament. While the world’s leaders were discussing strategies for addressing climate change, the environmentalists were ensuring that the oil sands stayed in the news. Thanks in large part to the Copenhagen protests, December of 2009 had the greatest volume of negative environmental coverage.

7 In the summer of 2009 Greenpeace attempted to lobby the Norwegian government to pull the state-owned petroleum company Statoil out of the oil sands. While this attempt failed, it garnered enough publicity and sympathy that Statoil’s activities in the oil sands became an issue in the fall 2009 Norwegian election.



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Copenhagen related criticisms of the oil sands by the Mayor of Toronto and the Premiers of Quebec and Ontario.

All of the above provided triggers or platforms for negative environmental commentary on the oil sands. The most significant element of these commentaries is that every one of them was more widely covered in all forms of media than the corresponding responses from the oil industry, the Alberta government and the federal government combined. For example, more was said about the environmental impact of the oil sands than about what is being done to lessen that impact, and Greenpeace's claim that the oil sands have three times the carbon emissions as conventional crude was repeated more often than the expert estimation of emissions being 5-15% higher. The environmental lobby was therefore far more effective at communicating its message. Word of breaking news or protest activity spread across cyberspace through re-posting, through links on environmental blogs, and through social media such as Facebook and Twitter so that it could be on a half-dozen sites or more within hours.

Economic stories generally reflected smaller stories relating to specific projects being resumed, costs pressures going down, new extraction technologies (e.g., Toe-to-heel air injection), new oil sands investments (e.g., PetroChina), and firms either ramping up (e.g., ConocoPhillips) or ramping down (e.g., Royal Dutch Shell) their engagement in the oil sands. Economic stories tended to lack the broader platforms or striking visuals upon and around which environmental stories were built.

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## NARRATIVE BEHIND THE SPECIFIC STORIES

Although the environmental events and platforms identified above may appear to be somewhat disjointed, they were often knit together by a coherent narrative. They can be seen as episodes in an ongoing story, or as specific illustrations of broader environmental themes. Thus our understanding of oil sands media coverage must include that underlying narrative, *although to do so is not necessarily to endorse it, or to argue that the media coverage was always right.*

### *The Environmental Narrative*

The environmental narrative is pretty straight-forward. At its extreme, environmental groups such as Greenpeace, the Sierra Club and the Rainforest Action Network seek to put an end to oil sands extraction entirely. There is little or no interest in conversation or compromise. The attacks on the oil sands center on images connected to the open pit mining employed in projects where the bitumen is close to the surface: boreal forest converted into barren moonscapes, vast lakes of toxic waste product and giant machines tearing at the Earth. Here it is important to stress that the attack on the oil sands is part of a broader campaign to wean the world from its dependency on carbon-based energy, and in this campaign the oil sands and the “dirty oil” they produce are particularly useful illustrations of the costs of carbon dependency. Thus attacks on the oil sands fit within a larger environmental narrative that spans both local environmental effects and the threat of global warming and climate change.

A good deal of this narrative was brought into focus by stories on the tailings ponds. While environmentalists targeted any and all ways in which oil sands development disturbs the environment, the greatest challenge to the image of the oil sands was the tailings ponds created when separating mined bitumen from the sand. Perhaps the most widely reported incident was the death of 1,600 ducks in one of Syncrude's tailings ponds, an incident that was widely covered when it first occurred, continued to be a point of discussion for months afterwards and received a new surge of coverage when Syncrude's trial over the deaths began in early 2010. The coverage of this event was almost always accompanied by

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photos of ducks coated in toxic waste, certainly one of the most damning images linked to the oil sands. An anti-oil sands campaigner can do more to move the public with just images than an oil sands defender could ever hope to. Photos of doomed ducks or simply photos of the tailings ponds will be covered more extensively in the media and re-posted online more often than any rebuttal from an oil sands company. There are no pro-oil sands photos with the same impact, if only because energy security and job creation are harder to capture in a photograph than are dying waterfowl.

While not as widely covered within Canada as the ducks, the protests of some First Nations communities near the oil sands projects garnered more and more attention overseas as the communities took their story on the road. The Cree people of Fort Chipewyan claimed that toxins from the tailings ponds contaminated the Athabasca River, leading to increased cancer rates in their town, particularly for a rare form of bile duct cancer.<sup>8</sup> The polluted water was also claimed to contaminate the fish and wildlife that they depend on for food. The Fort Chipewyan Cree were a common presence in protests overseas. Representatives of the Cree teamed with environmental groups in England for protests against petroleum companies BP and Shell, and financiers of oil sands developments (e.g., the Royal Bank of Scotland). They were also part of the mammoth protests against the oil sands during the United Nations' COP15 conference on climate change in Copenhagen.

In short, the tailings ponds were, are and will remain a public relations liability for the oil industry. In the year's worth of stories we followed, the only positive stories to discuss tailings ponds involved either government deadlines or new technologies to clean them up. While the tailings ponds represent only part of the environmental coverage received by the oil sands, they are a powerful part of that coverage given their strong visual presentation. The only way in which tailings ponds can stop harming the image of the oil sands is through demonstrable progress in making them go away.

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<sup>8</sup> While the results and methodology of the physician who first diagnosed the increased cancer rates have been largely discredited, the Fort Chipewyan story and label of "bloody oil" from the oil sands still lives in cyberspace and political protests.

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### *The Economic Narrative*

While the environmental media coverage encompassed the impact of oil sands projects on land, air and water, areas where the industry is inevitably on the defensive, the economic coverage was on the profitability of oil sand projects and their contribution to energy security. In this arena, the oil sands fared much better.

When the Canada West Foundation began monitoring oil sands media in the spring of 2009, the oil industry and more specifically the oil sands were still reeling from the massive drop in oil prices the previous fall. Projects had been shelved, spending and activity were down, and it appeared as though the economy had accomplished what the environmentalists could not. However, as the summer progressed, the economic message became one of recovery. As the price of oil gradually climbed back up, investment in the oil sands resumed.

The most widely covered sign of turnaround came on August 31<sup>st</sup> when China entered the oil sands. State-owned PetroChina's \$2 billion purchase of a majority share of Athabasca Oil Sands Corporation's McKay River and Dover projects was the most widely covered economic story of the entire monitoring period, continuing to draw attention into 2010. Primarily this was seen as a sign of renewed growth for the oil sands, proof that they were still a desirable commodity and had new markets. Indeed, Chinese interest in Alberta oil provided security for the oil sands industry while the American government was considering carbon legislation that might exclude oil sands bitumen: it potentially opened large new markets for Canadian oil should Canada's largest trading partner back away.

However, there were concerns over this deal and subsequent Chinese purchases in the spring of 2010: at first concern was simply over Canadian resources falling under the control of foreign powers, but as later deals were examined the concern shifted to where the bitumen produced in Chinese-controlled projects would be upgraded. The possibility that raw bitumen would be shipped to China for upgrading was controversial on two levels. First, the issue of raw bitumen being upgraded anywhere outside of Alberta was a point of concern for the entire year of monitoring, with many feeling that exporting raw bitumen would mean lost jobs and tax income from upgrading plants. Second, the federal government has stated a clear opposition to raw Canadian bitumen being upgraded in countries without a solid environmental track record.

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China's interest in bitumen was not the only sign of renewed activity. Throughout the year projects that had been delayed by the economic crisis got back on schedule and new projects were started. A clear sign of economic recovery from outside the oil industry itself was found in websites proffering stock advice. As the year went on and the price of oil rose, more and more websites identified oil sands companies as being worthwhile stocks. This renewed market confidence was clearly demonstrated in March of 2010, when Athabasca Oil Sands Corporation's initial public offering (IPO) raised CAN\$1.35 billion, making it the largest Canadian IPO since 1999.

As far as energy security is concerned, the oil sands' role seems to be clear. President Obama and key members of his administration have stated that Canadian oil, including the oil sands, will play a continuing role in US energy policy. The European Union has been considering cracking down on higher-carbon fuel sources, but the most recent reports indicated that loopholes would be added to allow oil sands bitumen. (At present Europe is not an active market, and is a remote potential market.) And the interest of Asian investors has been building, with not only China but South Korea making purchases in the oil patch.

As stated earlier, more is being said about the environmental damage of the oil sands than what the industry is doing to lessen or even undo that damage. This is particularly true when it comes to technological innovations. Researchers in oil firms and universities across North America are developing tools and processes to make bitumen extraction cleaner, but these breakthroughs are woefully underreported. (They are also very difficult to report in a "news" format.) The one exception is carbon capture and storage (CCS) in which carbon dioxide is captured from emissions and stored underground or used for enhanced oil recovery. However, CCS has attracted more criticism than praise in the media coverage we tracked. There are those who say that CCS is too expensive, and that even after the technology has been fully developed it will still require millions of dollars in government subsidies to be feasible. There are also those who say that the actual amount of carbon reduction CCS will accomplish simply isn't sufficient, and even after potentially billions of taxpayer dollars the oil sands would still be releasing too much carbon into the atmosphere.

Other technologies and processes that could have a greater impact receive far less attention. The most commonly known alternative to open pit mining is steam-assisted gravity drainage (SAGD). SAGD injects steam into bitumen deposits too deep to mine, melting them and allowing them

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to be pumped out like conventional crude. SAGD involves less disturbance of the land than pit mining and no tailings ponds. However, it was clear from the media coverage that a switch from pit mining to SAGD would not be enough to satisfy environmental critics: in addition to claiming SAGD projects still disturb too much land and pose a risk to wildlife, they point to the increased water use (though the water used is non-potable and mostly recycled) and to the natural gas burned to heat the water into steam. The Pembina Institute has already spoken out against SAGD for these reasons.

Researchers are also getting close to developing solutions to the tailings ponds. Multiple researchers in Alberta and Utah have developed techniques for faster separation of tailings waste from water, allowing for faster drying or even making tailings ponds unnecessary. Suncor's Tailings Reduction Operations uses a polymer to turn liquid tailings into a dry material suitable for land reclamation. Firestone Resources' EncapSol Oil Extraction is a chemical process for separating hydrocarbons from sand that would replace the heating and washing process that results in tailings ponds. The University of Utah developed a process that uses bubbles of ozone gas to separate hydrocarbons from water. Advanced Clean Technologies' chemical process for extracting bitumen from sand, providing a higher yield, increased energy efficiency and decreased environmental impact, has been successfully tested in Alberta and Utah. These processes, put into mass use, could make serious progress in cleaning up the oil sands' largest environmental and media challenges: tailings ponds, carbon emissions and water use. However, communicating incremental progress on this front is very difficult in a media environment understandably driven by more dramatic events.



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## CONCLUSION

Are there lessons to be learned from this survey of oil sands media coverage over the past 12 months? At the moment, the general media impression is that the oil sands are environmentally damaging yet essential to the Canadian economy and North American energy security, and of growing interests to energy needs overseas. In short, a necessary evil. Yet, while the oil industry and Alberta government try to stress the “necessary” while erasing the “evil,” the environmental lobby is attempting the opposite. While environmental groups are vocal enough to ensure that the phrase “dirty oil” remains linked to the oil sands, they have not been able to convince key policy makers or corporate stakeholders that the oil sands are any less necessary. The oil sands drive the economy of one of Canada’s most prosperous provinces and play an increasingly key role in powering the western world. These facts have kept the oil sands going despite the increasingly frequent protests against them.

However, the environmental lobby shows no signs of giving up. The oil industry has been stuck on defensive in this public relations fight. The way to change that is not to attack the environmentalists, for scattered attempts to do so have not damaged the environmental cause nor improved the image of the oil industry. The environmental impact of the oil sands has been so frequently mentioned by environmentalists that the only answer is to reduce the environmental impact in a way that can be clearly measured and communicated to the public. While job and wealth creation are both viable defences for the oil sands, they are not easy to photograph. What can be demonstrated through images is the herd of bison living on a former Syncrude site. This fully reclaimed land shows that the impact of oil sands extraction can be temporary, and that mine sites can once again be wildlife habitats. However, it is not enough. The fully reclaimed land is a tiny fraction of the land disturbed for mines and tailings ponds, and before it can improve the oil sands’ reputation, much more must be reclaimed.

The image of the oil sands remained tied to open pit mining. Forests reduced to moonscapes, toxic lakes that can be seen from space and, thanks to the movie *Avatar* using the oil sands as its model for the mining operations of the fictitious world of Pandora, landscapes being torn apart by giant machines. The fact is that the oil industry is beginning to move

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beyond these images, using extraction methods that don't involve pits or waste ponds. In order to compete more successfully in the PR battle, the oil industry needs to get out the message that the face of the oil sands is changing. And the first step towards getting this message out is ensuring that the old face of the oil sands is phased out as quickly as possible.

Media coverage is not as one-sided as is often assumed. At the same time, the PR battle is unlikely to be one that proponents of oil sands development will ever win. Simply put, dead ducks are news and ducks that are successfully scared off from tailings ponds are not. Although, as we have also seen, Media stories are not all about bad news, critics do have an inherent media advantage that proponents lack. For the most part, proponents will necessarily be reactive, counter-punches in the contest where the initiative rests with their opponents. Thus media coverage documented in this report, coverage that is generally negative but not overwhelmingly so, may be as good as it gets. The goal of oil sands proponents should not be to win the media war, but to make sure that they don't lose the war more decisively. This is a reachable goal if real improvements on the ground provide the essential ammunition.

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### APPENDIX - Oil Sands Coverage (May 2009 - April 2010)

<b>POSITIVE Environmental Stories</b>	Canada Media	International Media	Web Media
<i>12 Month Average</i>	<b>17.3</b>	<b>3.1</b>	<b>17.8</b>
May 2009	27	2	13
June 2009	10	5	12
July 2009	8	2	13
August 2009	10	3	18
September 2010	8	4	20
October 2010	13	6	28
November 2010	15	1	9
December 2010	39	2	25
January 2010	22	3	26
February 2010	15	3	8
March 2010	18	3	18
April 2010	22	3	24
<b>TOTAL</b>	<b>207</b>	<b>37</b>	<b>214</b>

<b>NEGATIVE Environmental Stories</b>	Canada Media	International Media	Web Media
<i>12 Month Average</i>	<b>47.6</b>	<b>11.8</b>	<b>100.3</b>
May 2009	49	17	66
June 2009	26	12	56
July 2009	32	5	73
August 2009	37	5	84
September 2010	58	22	119
October 2010	63	8	100
November 2010	37	14	91
December 2010	74	11	171
January 2011	29	1	41
February 2011	44	4	108
March 2011	65	23	148
April 2011	57	20	146
<b>TOTAL</b>	<b>571</b>	<b>142</b>	<b>1,203</b>

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<b>NEUTRAL Environmental Stories</b>	Canada Media	International Media	Web Media
<i>12 Month Average</i>	<b>14.5</b>	<b>2.3</b>	<b>10.6</b>
May 2009	11	2	4
June 2009	17	0	6
July 2009	15	2	5
August 2009	8	9	14
September 2010	22	2	12
October 2010	34	4	13
November 2010	8	3	4
December 2010	21	1	10
January 2010	12	1	22
February 2010	9	0	9
March 2010	6	4	16
April 2010	11	0	12
<b>TOTAL</b>	<b>174</b>	<b>28</b>	<b>127</b>

<b>POSITIVE Economic Stories</b>	Canada Media	International Media	Web Media
<i>12 Month Average</i>	<b>28.0</b>	<b>8.3</b>	<b>30.4</b>
May 2009	32	4	14
June 2009	49	9	16
July 2009	29	9	16
August 2009	12	2	14
September 2010	26	8	35
October 2010	25	6	24
November 2010	30	11	36
December 2010	20	6	25
January 2010	34	12	54
February 2010	23	14	37
March 2010	44	12	51
April 2010	12	7	43
<b>TOTAL</b>	<b>336</b>	<b>100</b>	<b>365</b>

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### APPENDIX - Oil Sands Coverage (May 2009 - April 2010)

<b>NEGATIVE Economic Stories</b>	<b>Canada Media</b>	<b>International Media</b>	<b>Web Media</b>
<i>12 Month Average</i>	<b>9.5</b>	<b>3.3</b>	<b>10.4</b>
May 2009	21	3	6
June 2009	7	3	8
July 2009	11	6	12
August 2009	2	1	9
September 2010	6	1	7
October 2010	12	4	5
November 2010	4	1	2
December 2010	8	0	6
January 2010	19	7	30
February 2010	10	5	19
March 2010	7	5	9
April 2010	7	3	12
<b>TOTAL</b>	<b>114</b>	<b>39</b>	<b>125</b>

<b>NEUTRAL Economic Stories</b>	<b>Canada Media</b>	<b>International Media</b>	<b>Web Media</b>
<i>12 Month Average</i>	<b>7.3</b>	<b>3.3</b>	<b>8.8</b>
May 2009	6	1	1
June 2009	4	1	3
July 2009	7	2	8
August 2009	5	1	8
September 2010	7	4	25
October 2010	9	2	8
November 2010	15	9	8
December 2010	4	2	4
January 2010	8	5	16
February 2010	13	2	7
March 2010	7	8	9
April 2010	2	3	9
<b>TOTAL</b>	<b>87</b>	<b>40</b>	<b>106</b>

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### APPENDIX - Oil Sands Coverage (*May 2009 - April 2010*)

TOTAL Stories by Month	ALL Media
<i>12 Month Average</i>	<b>334.6</b>
May 2009	279
June 2009	244
July 2009	255
August 2009	242
September 2010	386
October 2010	364
November 2010	298
December 2010	429
January 2010	342
February 2010	330
March 2010	453
April 2010	393
<b>TOTAL</b>	<b>4,015</b>



## About Canada West Foundation

The Canada West Foundation is the only think tank dedicated to being the objective, nonpartisan voice for issues of vital concern to western Canadians. Through our research and commentary, we contribute to better government decisions and a stronger Canadian economy.

The West is in. And the Canada West Foundation helped put it there. Over the past 40 years, our research and commentary has improved government policy and decision making. Today, the West has been a part of the national agenda and has been at the forefront of the most important debates that have shaped our country.

We give the people of British Columbia, Alberta, Saskatchewan and Manitoba a voice. A voice for their dreams, interests and frustrations. As westerners, we understand the people and the places of the West. We know our history and how it influences our future. Whether it is the economy, environment, education, healthcare, taxes, energy, social services, urban issues, provincial-federal relations or any other policy area of importance to the West, we have researched it, commented on it, stimulated debate about it and recommended practical options for improving the policy response. Democracy lives.

The Canada West Foundation is known and respected for its independence. No one tells us what to say, even though we are engaged by all levels of government, all types of companies, associations and philanthropic foundations. As a registered Canadian charitable organization (#11882 8698 RR 0001), donations ensure our research is available and free, so everyone can benefit.

Our credentials are impressive. We have the policy and economic experts you need. Our Board of Directors represent the who's who of the four western provinces. Our list of projects is long. We're just like the West. Absolutely essential. Absolutely part of Canada's success.

More information can be found at [www.cwf.ca](http://www.cwf.ca).



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