



30 April 2013

Analysis of global, English-language newspaper coverage of Canada's bitumen sands resource

for the twelve months ending 31 March 2013

About this study

The study examined coverage in 31 newspapers from three different countries over a twelve-month period ending 31 March 2013 that mentioned either “oil sands” or “tar sands”. The sample consisted of 500 articles. Newspapers were chosen in each country for their audience reach, as well as for regional and ownership distribution within the country. Omitted from the selection were the two major financial newspapers in the UK (the *UK Financial Times*) and US (*Wall Street Journal*). While the two financial papers have a very large audience, they also target a specific audience, and we wanted to focus on coverage that would reach a more general public. Each item was evaluated for tone towards the development of bituminous sands, who wrote the article (newspaper staff, a wire service, or some third party), and how the term was mentioned (in a quote, in the name of an organization, or as part of the news report). An audience weighting scheme was also applied using global circulation figures coupled with a prominence/placement scoring system to give more weight to items in which the resource was given more emphasis.

Introduction

Canada’s oil sands may be our only issue that has global visibility. In the debate over what to do about the oil sands, language is critical, and it starts with how to define it: as “oil” sands – which has a more pro-development connotation, or as “tar” sands – which aligns with those that portray the resource as “dirty oil.” The debate is actually a primarily English-language phenomenon. Many languages use the more neutral and arguably more accurate term “bitumen,” including French (“sables bitumineux”) and Italian (sabia bituminosa). In Spanish there are occasionally references to “arenas de alquitrán” (read “tar sands”), but the most commonly used term appears to be “arenas bituminosas.” German is an exception, offering both “ölsand” and “teersande” that is similar to the differentiation witnessed in English. Nonetheless, the fact that most of the attention to the resource occurs in North America, the tension about what to call the resource largely revolves around English-language usage.

So what do the media use?

In Canada, “oil sands” is universally used by major English-language news media organizations. References to “tar sands” do appear in Canadian media reports, but they are almost always from letters to editor, references to named organizations (e.g., Tar Sands Blockade) or quotes taken from interviews of people who use the more negative term. In general, the ratio is 10:1 in terms of usage of oil sands to tar sands in Canadian newspaper reporting. The ratio is lower for a few newspapers, such as the *Toronto Star* and the *Winnipeg Free Press* (2:1) and the *Whitehorse Daily Star* (almost 1:1). A higher ratio of letters and op-ed submissions using “tar sands” relative to news reports about the resource was the main factor behind the lower ratio, but for the latter two papers, the occasional use of US-based wire copy that used “tar sands” was also a factor (see below).

Elsewhere in the English-speaking world, however, the use of “oil” versus “tar” sands is more divided. This inaugural MediaLAB report looks at what the media use in the U.S., the UK, and Australia. What terms do they use, and outside of Canada, what is the overall tone towards the resource, and what impact this might have on audiences.

Discussion of results

While it varies by country, overall, international English-language media is split between the use of “oil sands” and “tar sands” in referring to Canada’s bitumen sands.

The first and most important element to note is that unlike Canada, there is no consistent use of either “oil sands” or “tar sands” to describe the resource by newspapers outside of Canada. Overall, the ratio between the usage of the two terms is roughly 1:1, with a slight edge to the term “oil sands”.

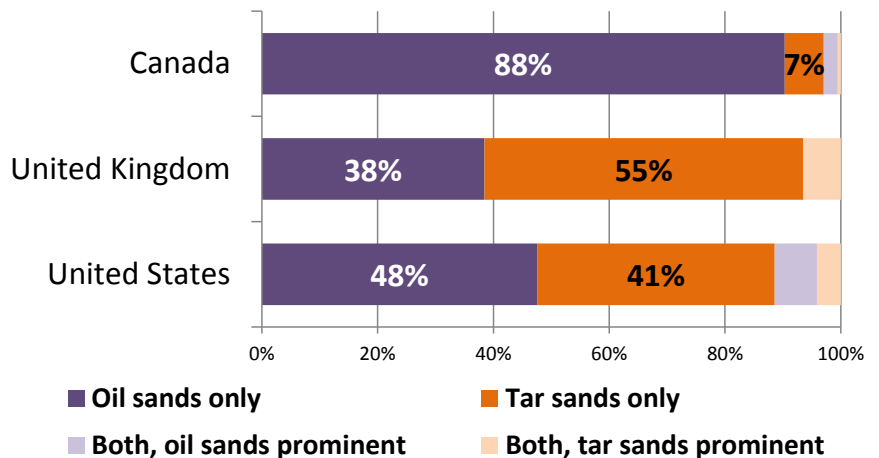
The 1:1 ratio varied slightly when examined by country. As illustrated in Figure 1 below, US newspapers tended to use “oil sands” by a ratio of 3:2, while in the UK press, it was closer to 2:3 in favour of “tar sands.” When measured based on audience reach rather than volume of news reports, the ratios in both countries move close to 1:1. In short, English-speaking people outside of Canada are as likely to see the resource labeled as “oil sands” as they are to see it labeled as “tar sands,” (more so in the UK, somewhat less so in the US), while Canadians tend to see only the term “oil sands.”

Despite this overall balance, there were noticeable differences between newspapers. In the US, the *Houston Chronicle* (not entirely surprising) used the term “oil sands” predominantly (3:1), as did the *Washington Post* and *Dallas Morning News* (2:1). There was a 1:1 ratio in the *New York Times*. The *Houston*

FIGURE 1

Share of the use of the term “oil sands” versus “tar sands” in newspapers, by country

While in Canada, 90% of coverage uses the term “oil sands”, the figure drops to less than 50% in the US, and only 38% in the UK.



Based on total volume of coverage measured for each country. Canada based on a six-month sample ending 31 March 2013 among 16 English-language newspapers surveyed. UK and US based on a twelve-month sample period ending 31 March 2012 involving 27 newspapers.

US outlets that tend to use “tar sands” often do so because of their use of news services such as AP and MCT that use the term. However, these papers tend to report less frequently on the resource than the *NYTimes*, *Washington Post* and *Houston Chronicle*, which tend to use their own resources in covering the resource more frequently.

Chronicle, *Washington Post* and *New York Times* also published the most about Canada’s bitumen sands. Other US newspapers surveyed, however, tended to use the term “tar sands.” The group using “tar sands” was led by *USA Today* (1:10), but most other US newspapers surveyed, including the *Minneapolis St. Paul Tribune*, *Chicago Tribune*, *St. Louis Post-Dispatch*, *Boston Globe*, *Orlando Sentinel*, and *Sacramento Bee*, preferred “tar sands” by a ratio of at least 1:2. The reason was that most other US newspapers used Associated Press or McClatchy-Tribune news services. Unlike Canadian media organizations, neither AP nor MCT universally subscribe to using the term “oil sands,” although the term will appear in certain AP items from reporters posted to certain countries, including Canada. This is why certain independent Canadian papers, such as the *Whitehorse Daily Star* and the *Winnipeg Free Press*, which occasionally use AP wire content, had a slightly higher ratio of publishing the term “tar sands.” However, papers that tended to use “tar sands” also reported much less frequently on the resource than the other larger dailies noted above. The *Houston Chronicle*, *New York Times* and *Washington Post* comprised 58% of the volume of coverage devoted to the resource among the 20 US newspapers surveyed, and when this higher frequency of reporting is combined with the larger audience reached by these dailies, their share of total audience reach rises to 71%.

Similar variations were observed in the UK. The *Guardian* generally used the term “tar sands” at an almost 1:10 ratio, and generated by far the most coverage about the resource in the UK among the major newspapers surveyed. Otherwise, UK dailies tended to publish items that preferred “oil sands,” although “tar sands” also appeared. As a result, audience exposure to the term “oil sands” in the UK almost exactly matched the number of people exposed to the term “tar sands,” but would vary depending on the newspaper they read.

Coverage in Australia was mixed, but volume of reporting on bitumen sands was very low.

Coverage in Australia was also balanced between the two terms, but the number of news reports about Canada’s bitumen sands has been so low in Australian newspapers over the last twelve months that the results were not significant. In nine major dailies reviewed in the country, only 33 items mentioned the resource, and none were particularly prominent. Canada’s bitumen sands tends to be cited in business reports or items that discuss Australia’s coal sector and global greenhouse gas emissions.

Newspapers are not always in control of how they frame an issue. Quotes from an interviewee, the name of an organization, or letters and op-ed submissions, can introduce either “oil sands” or “tar sands” into a newspaper’s content, so we looked at the items based on whether the terms were generated directly by a newspaper’s staff, or from a source beyond their control. Our analysis of this measure of “control” over the framing of bitumen sands, however, was generally inconclusive. We did not find newspapers that tended to prefer one term over the

Statistically, there was only a weak relationship between a newspaper's "control" over what term to use, and the selection of a term.

other did so through their own control. For example, overall coverage in the *New York Times* referring to the resource as "oil sands" was higher than that referring to it as "tar sands" by a ratio of just under 3:2. The "tar sands" mentions came equally from both the paper and third-party sources, while the "oil sands" mentions came mostly from newspaper staff. A relationship was observed, but it was weak ($r=-0.23$, $p<.01$). This weak relationship was observed among all US newspapers as a group, as well as all UK newspapers. In short, there was no evidence of a relationship between control of the frame, and the result of the frame itself. For newspapers such as the *New York Times*, how the oil/tar sands are cited is a product of both the newspaper and third-party sources alike.

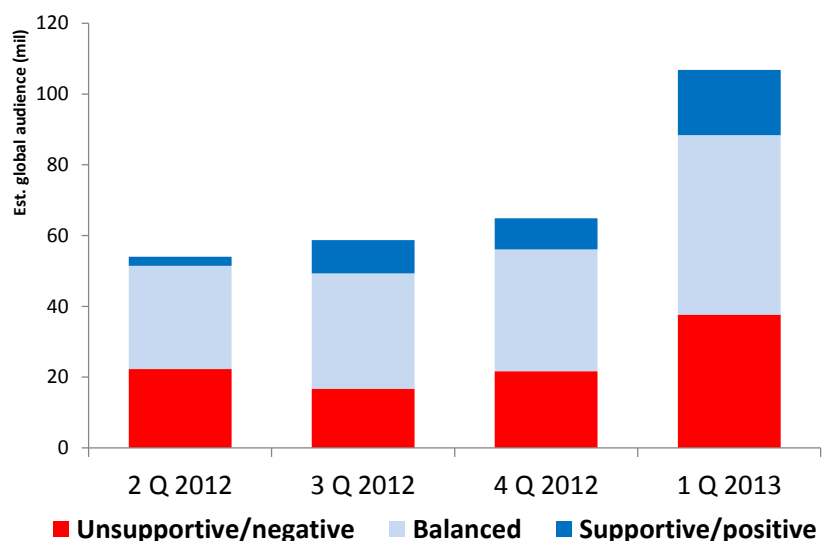
Tone, however, was another matter. Overall, it should be said that the bulk of what English-language audiences in Australia, the UK and US see about Canada's bitumen sands is neutral/balanced in tone. Moreover, there has been no significant change in tone over the last twelve months towards the resource in global newspapers despite its increased visibility. Negative reporting has increased, but positive reporting has also risen, along with neutral reporting.

Nonetheless, negative coverage has been significant. Excluding the brief references to the resource and looking only at prominent mentions (*i.e.*, news items that are about bitumen sands and/or note the resource in the headline), negative items comprise a higher share at over 50% of prominent coverage in both countries. Measured by estimated audience exposure, negative coverage

FIGURE 2

Volume and tone of coverage towards Canada's bitumen sands, by quarter

Coverage of Canada's bitumen sands had been rising incrementally throughout 2012, but jumped in the first quarter of 2013 due to events surrounding the approval of Keystone XL. People exposed to the story in Q1-2013 doubled compared to 2012.



Based on total volume of coverage measured by estimated audience reach in sample ending 31 March 2013 among 31 English-language newspapers surveyed in the UK, US and Australia. N=500.

While most coverage was neutral/balanced, negative coverage comprised one-third of audience exposure, and accounted for almost half of all prominent mentions of the resource.

has reached more people than positive reporting. Over the last year, it is estimated that roughly one-in-three exposed to a story about bitumen sands saw an item that was negative about the resource. That negative share was roughly the same in both the UK and the US press.

Not surprisingly, newspapers that tended to have a preponderance of coverage that referred to the resource as “tar sands” tended to be more negative in covering the resource than those that referred to it as “oil sands,” but that relationship was not strong. There was only a moderate statistical relationship observed between tone and use of terms ($r=0.39$, $p<.01$). The UK *Guardian* was the most negative in the survey, and the *Guardian* tended to use the term “tar sands” almost exclusively. The *Guardian* published several reports from its US environmental reporter Suzanne Goldenberg that were generally negative about Canada’s bitumen sands, and it also published several letters on the subject, including an op-ed submission from [actress Daryl Hannah](#) (her arrest outside the Whitehouse in March was one of the biggest global news stories about the oil sands to date in 2013). The other papers among the top five most-negative only published between nine and eleven items (below nine items are excluded from

FIGURE 3

Tone of coverage towards Canada’s bitumen sands by newspaper, last twelve months

	Supportive/ positive	Balanced	Unsupportive/ negative
The New York Times, while opposed to further expansion of Canada’s bitumen sands resources editorially, provided coverage that was only slightly more negative than average among the 31 newspapers surveyed. The most negative proved to be <i>The Guardian</i> and <i>The Independent</i> in the UK as well as several US newspapers, although the <i>Philadelphia Inquirer</i>, <i>St. Louis Post-Dispatch</i> and <i>USA Today</i> printed relatively few news items on the resource.			
Philadelphia Inquirer	6%	25%	69%
UK The Independent	0%	36%	64%
UK The Guardian	1%	35%	64%
St. Louis Post-Dispatch	13%	29%	58%
USA Today	27%	27%	47%
Minneapolis Star Tribune	8%	46%	46%
New York Times	12%	48%	40%
Washington Post	12%	54%	35%
AVERAGE	14%	53%	34%
The Scotsman	0%	73%	27%
Chicago Tribune	14%	60%	26%
Houston Chronicle	19%	59%	22%
UK Daily Telegraph	14%	67%	19%
Dallas News	29%	57%	15%
Orlando Sentinel	15%	75%	11%
London Times	0%	97%	3%
The Australian	68%	32%	0%
OTHERS	19%	51%	31%

Based on percentage share of total coverage measured by estimated audience reach in sample ending 31 March 2013 among 31 English-language newspapers surveyed in the UK, US and Australia. N=500.

Tone of coverage in the *New York Times* was close to the international average despite its editorial position against further development of the resource.

the table below). The *New York Times* and the *Washington Post* were more active in reporting on the resource, and in terms of tone were closer to the average. However, it needs to be noted that while its overall tone was close to average, the *New York Times* has been prominent in its op-ed pages in not supporting the development of Canada's bitumen sands. The *New York Times* came out against the construction of the Keystone XL pipeline in an [editorial](#) in March mostly due to their view about bitumen sands development, and the day before published a prominent column by [Thomas Friedman](#) that labeled it the "dirtiest extraction of the dirtiest crude." Among the most critical was an op-ed submission labeled "the tar sands disaster" by Canadian scholar [Thomas Homer-Dixon](#) (not included as it appeared in the April 1st edition, just outside our sample period).

Conclusion

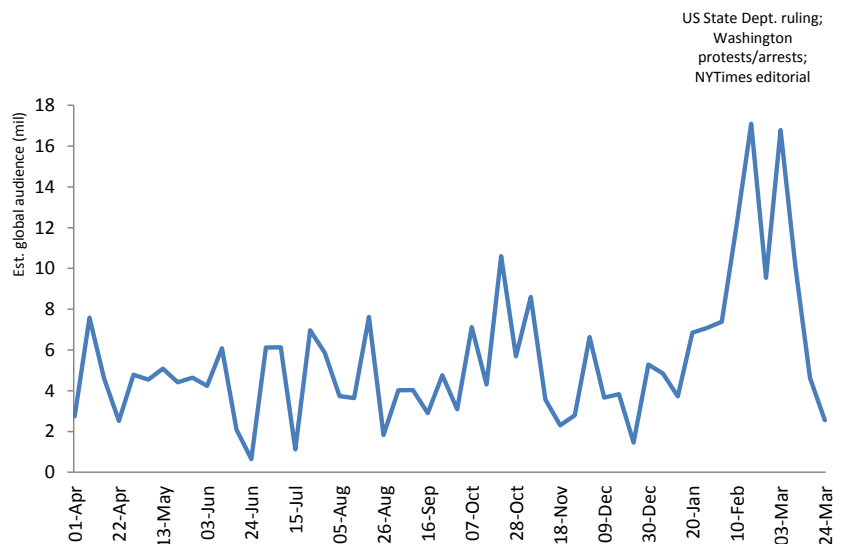
Oil sands or tar sands? In Canada, that question is largely settled (it is "oil sands") because news organizations choose to use one term (French-Canadian as well, by default), and many Canadians tend to respond in kind in letters and op-ed submissions. Outside of Canada, however, it is an almost even split between the use of the terms and to the degree by which people are exposed to them.

As for why this may be the case, there was no straight answer evident in the

FIGURE 4

Tracking volume of international coverage of Canada's bitumen sands by week, last twelve months

The biggest peaks occurred relatively recently in the sample period following the US State Department advisory on Keystone XL, protests held in front of the Whitehouse, and negative editorials and columns in the *New York Times*.



Based on total volume of coverage measured by estimated audience reach in sample ending 31 March 2013 among 31 English-language newspapers surveyed in the UK, US and Australia. N=500.

Of particular note was the increase observed in volume of coverage, with people exposed to stories about Canada's bitumen sands roughly doubling in the first three months of 2013 compared to 2012, mostly as a result of events surrounding the approval of Keystone XL. The proportion of negative coverage has also been rising.

analysis, as it depends on the mix of different sources of information, such as which wire services were used, the preference of certain reporters, and the balance of op-ed and letters that a newspaper published. This mix produced some outlets that published more coverage using one term than another, but with no clear pattern. The term "tar sands" appears in AP reports published in the *Houston Chronicle*. Ian Austen, a reporter for the *New York Times* covering Canadian events and issues, uses "oil sands," while the *Times'* energy and environment reporter, John M. Broder ([he of recent Tesla car test fame](#)) uses "tar sands."

Neither was there a simple answer on tone of coverage. Most people in the US and UK were exposed to coverage that was at least balanced/neutral, if not favourable, in covering the resource, regardless of the term. There was a moderate-to-weak relationship between tone and the terms used (almost 11% of the sample consisted of favourable items using the term "tar sands" and/or negative items using the term "oil sands"). Nonetheless, one-third of those seeing a report on bitumen sands saw a negative item—a relatively high share of audience exposure, and over half of all prominent items (the ones mostly likely to have an effect) were negative.

One thing, however, was clear from the results: global media attention to Canada's bitumen sands resource is increasing, and that's not a good thing for those that want to see further development. Mostly due to the ramp-up to a US presidential decision on Keystone XL, coverage of the topic during the first quarter of 2013 was double that witnessed in any quarter observed in 2012. Accompanying that increase was a rise in the proportion using the term "tar sands" (from 26% in Q3-2012, to 43% in Q4-2012, to 56% in Q1-2013), and an increase in negative coverage as a share of total exposure, to 36% in Q1-2013, compared to 33% in Q4-2012 and 28% in Q3-2012. The change was more noticeable in the US (again, due to Keystone XL), but also in the UK. Once President Obama reaches a decision, it is expected that media attention will diminish and tone may improve. However, it is also likely that media coverage will not return to the lower levels witnessed before the debate began over Keystone XL. Moreover, it is possible that when Canada's bitumen sands' fifteen seconds of global fame are up, people's view of the resource outside of our country will be set, unless a combination of heavy advertising and a new, better issue that can change the framing come along.

About Cormex

The following media analysis report was prepared by Cormex Research as part of its MediaLAB project. Cormex Research is Canada's leading media content measurement and analysis firm, serving the country's top private, public and non-profit organizations since 1989. For more information, please contact our offices at (416) 504-8236, or visit our website at www.cormex.com.