

SECTION FIVE: PROJECT ACCOMMODATIONS POPULATION COUNT



PROJECT ACCOMMODATIONS POPULATION COUNT

The following section outlines the results of the population count conducted through phone interviews for project accommodations in the Municipality during Census 2012. An assessment of the population counts for project accommodations from 2000 to 2012 is presented along with the average annual growth rate for project accommodations allowing for changes over the last 12 years to be further explored. A total of 88 project accommodations from previous industry listings and municipal reviews were contacted as part of Census 2012; of those, 74 were occupied and 14 were reported as vacant or under construction.

Table 41 shows the population in project accommodations over the past 12 years, spanning from 2000 to 2012. The population numbers show a slow rise between 2000 and 2006 with a sharp increase between 2006 and 2008. From 2008 to 2010 the population slightly decreased due to a slowdown in the economy and oil sands development. However, 2010 to 2011 shows the largest increase in project accommodation population, of 11,165. **Figure 39** illustrates the change in the population of project accommodations from 2000 to 2012.

Table 41: Population in project accommodations from 2000-2012

	2000	2002	2004	2005	2006	2007	2008	2010	2011	2012
Project Accommodation	5,903	8,063	7,678	9,178	10,442	18,572	26,284	23,325	34,490	39,271

Note: Prior to Census 2012, project accommodation population values have been supplied by the Oil Sands Developers Group (OSDG).



Figure 39: Population in project accommodations from 2000-2012

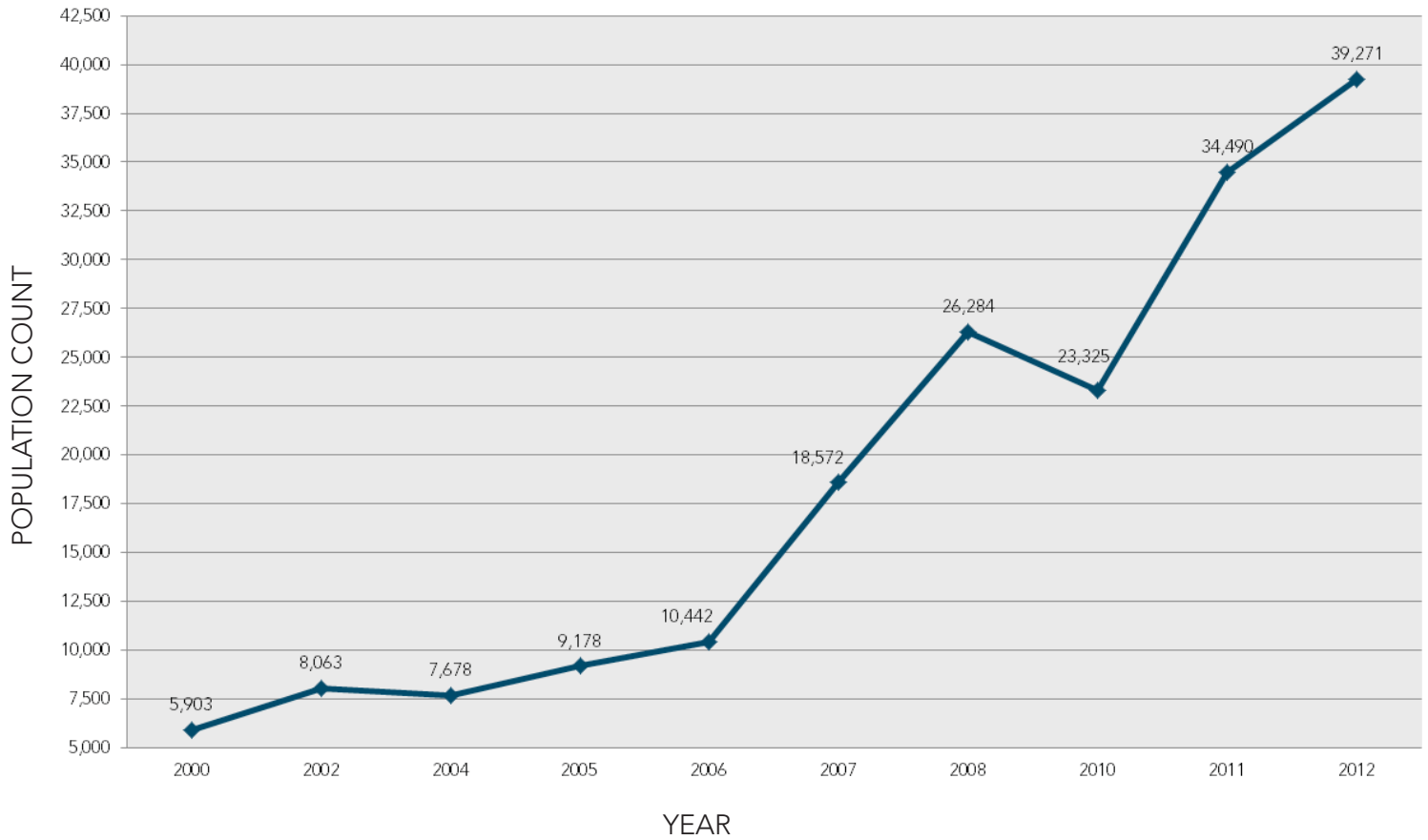
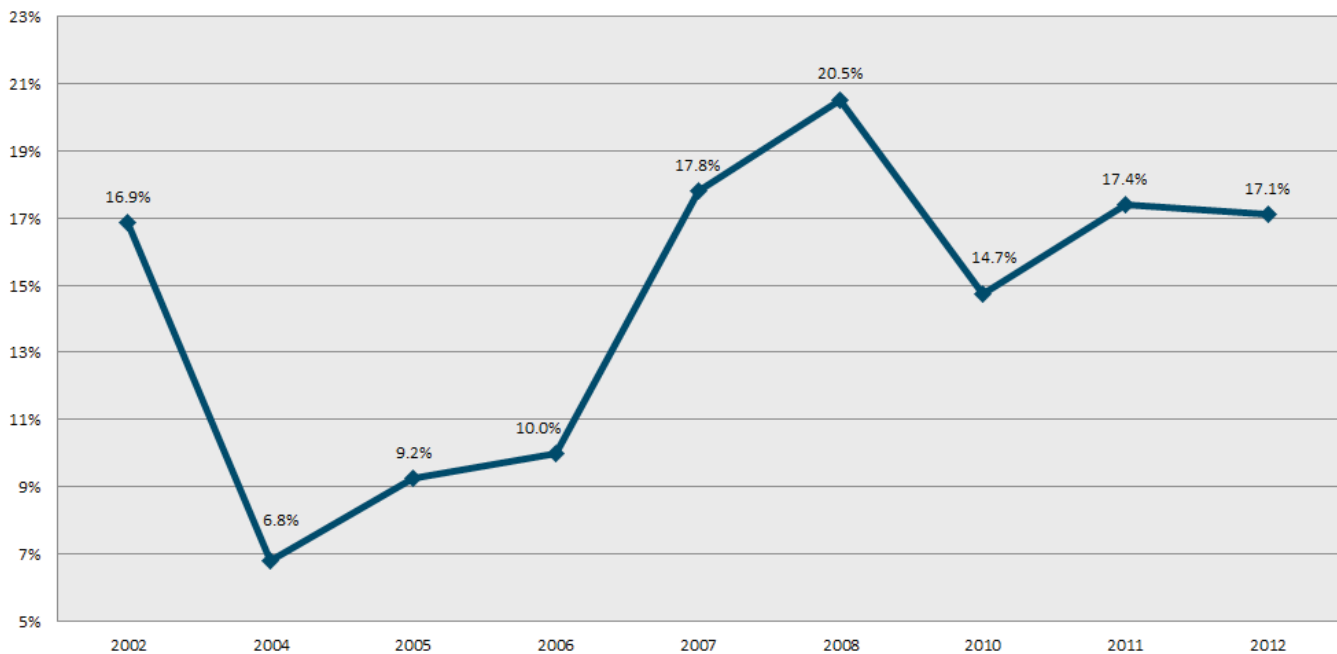


Table 42 and **Figure 40** display the annual growth rate of the population in project accommodations from 2000 to 2012. The highest growth rate is noted in 2008 which represents the peak of year-on-year average growth in the oil sands developments to date. After a brief slowdown in development from 2008 to 2010, the population of project accommodations has continued to grow and the annual growth rate is above the 17.0% mark, with a total of 17.4% in 2011 and 17.1% in 2012.

Table 42: Compound Annual Growth Rate (CAGR) of the population in project accommodations from 2000-2012

	2002	2004	2005	2006	2007	2008	2010	2011	2012
Compound Annual Growth Rate	16.9%	6.8%	9.2%	10.0%	17.8%	20.5%	14.7%	17.4%	17.1%

Figure 40: Annual Growth Rate of the population in project accommodations from 2000-2012



Map 3 outlines the breakdown of the population count that was completed for project accommodations during Census 2012. Project accommodations to the north of the Urban Service Area comprise the majority of project accommodations in the Municipality with a total population of 30,323 (77.2% of the total project accommodations). Respectively, project accommodations located to the south of the Urban Service Area have a total head count of 8,948 (22.8%), bringing the total population in project accommodations to 39,271.

Map 5: Population count for project accommodations during Census 2012



SECTION SIX: PROJECT ACCOMMODATIONS DEMOGRAPHIC PROFILE



PROJECT ACCOMMODATIONS DEMOGRAPHIC PROFILE

The following section outlines the results of a survey conducted on a sample population residing in project accommodations. Nine project accommodations (6 sites located north and 3 sites located south of the Urban Service Area) were visited and 1,801 people were interviewed. The survey questions (**Figure 41**) were the same questions asked in Census 2012. **Map 4** displays the location of project accommodations that were visited to conduct enumeration during Census 2012.

Project accommodations are defined as dwelling units that are owned and operated by companies to provide lodging for their staff. Census 2012 facilitates an understanding of the project accommodations' population related to age and gender distribution, marital status, ethnicity, country of origin, primary place of residence, main spoken language, education level, employment, household income, and considerations for moving to the Urban Service Area. The sample size from the project accommodations' population for Census 2012 is 1,801 people aged 15 years and older.

The results of Census 2012 for project accommodations allude to a population that is primarily male Caucasians, between the ages of 25 and 59, who speak English as a main language. Slightly more than half the respondents to Census 2012, both male and female, are married with a primary residence outside the Province of Alberta. The majority of the workers have at least a high school diploma/certificate.



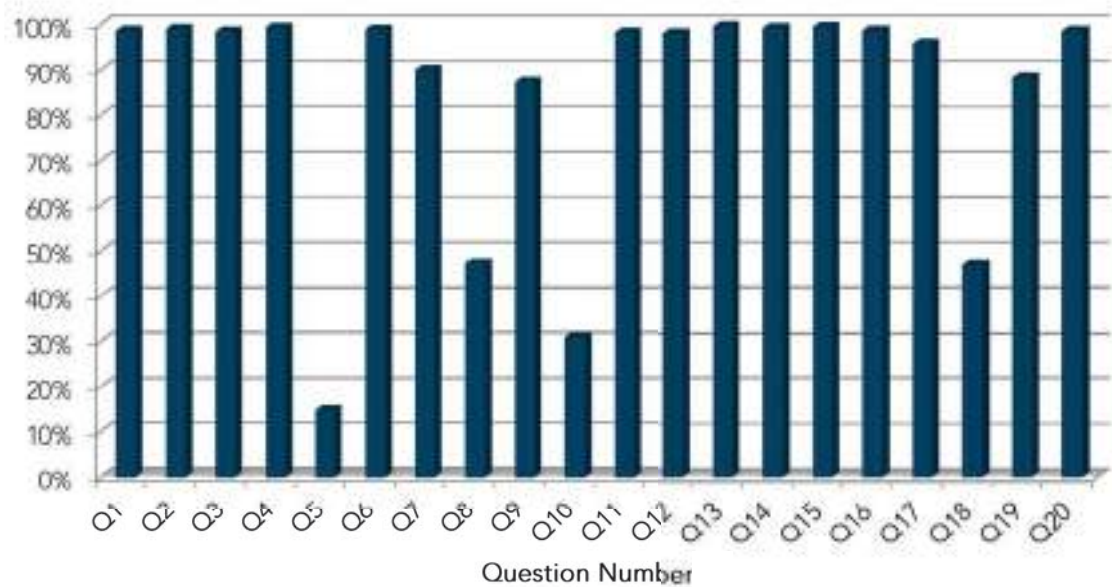
Map 6: Regional map identifying the project accommodation sample surveyed



Note: Map 4 shows the location and count of the sample population that was survey during Census 2012.



Figure 41: Response percentage by question at the person level enumerated within project accommodations



Legend

Q1: Please provide the gender for this resident.

Q2: Please indicate the age of this resident.

Q3: What ethnic group does this person identify with?

Q4: Does this person identify with Canada as their country of origin?

Q5: What region of origin does this person identify with?

Q6: Is this address the primary place of residence for this person?

Q7: Please select the location of the alternative residence.

Q8: What province is this alternative residence in?

Q9: Where was this person living 1 year ago (on May 9, 2011)?

Q10: What province was this person living in 1 year ago?

Q11: What is the highest level of education this person has attained?

Q12: What is the marital status of this person?

Q13: What is the employment status of this person?

Q14: What kind of business or service industry is this person employed in?

Q15: What location does this person primarily work in?

Q16: How long has this person worked in Alberta Oil Sands (total)?

Q17: How often does this person visit the Fort McMurray Urban Service Area?

Q18: What could make this person consider living in Fort McMurray?

Q19: What is the estimated gross annual income of this person?

Q20: What is the primary language spoken by this person?

Table 43: Responses by question at the person level enumerated within project accommodations

Question Number	Responses at Person Level					
	Response ⁴³		Non-Response			
	Responses	(%)	No response from residents	(%)	Not applicable	(%)
Q1	1,777	98.7	24	1.3	-	0.0
Q2	1,784	99.0	17	1.0	-	0.0
Q3	1,774	98.5	27	1.5	-	0.0
Q4	1,788	99.3	13	0.7	-	0.0
Q5	269	14.9	24	1.4	1,508	83.7
Q6	1,782	98.9	19	1.1	-	0.0
Q7	1,623	90.1	84	4.7	94	5.2
Q8	852	47.3	131	7.3	818	45.4
Q9	1,573	87.3	228	12.7	-	0.0
Q10	556	30.9	218	12.1	1,027	57.0
Q11	1,771	98.3	30	1.7	-	0.0
Q12	1,766	98.1	35	1.9	-	0.0
Q13	1,794	99.6	7	0.4	-	0.0
Q14	1,786	99.2	15	0.8	-	0.0
Q15	1,792	99.5	9	0.5	-	0.0
Q16	1,778	98.7	23	1.3	-	0.0
Q17	1,727	95.9	74	4.1	-	0.0
Q18	849	47.1	952	52.9	-	0.0
Q19	1,593	88.5	208	11.5	-	0.0
Q20	1,775	98.6	26	1.4	-	0.0

⁴³ Response percent calculations based on a project accommodations sample population of 1,801.

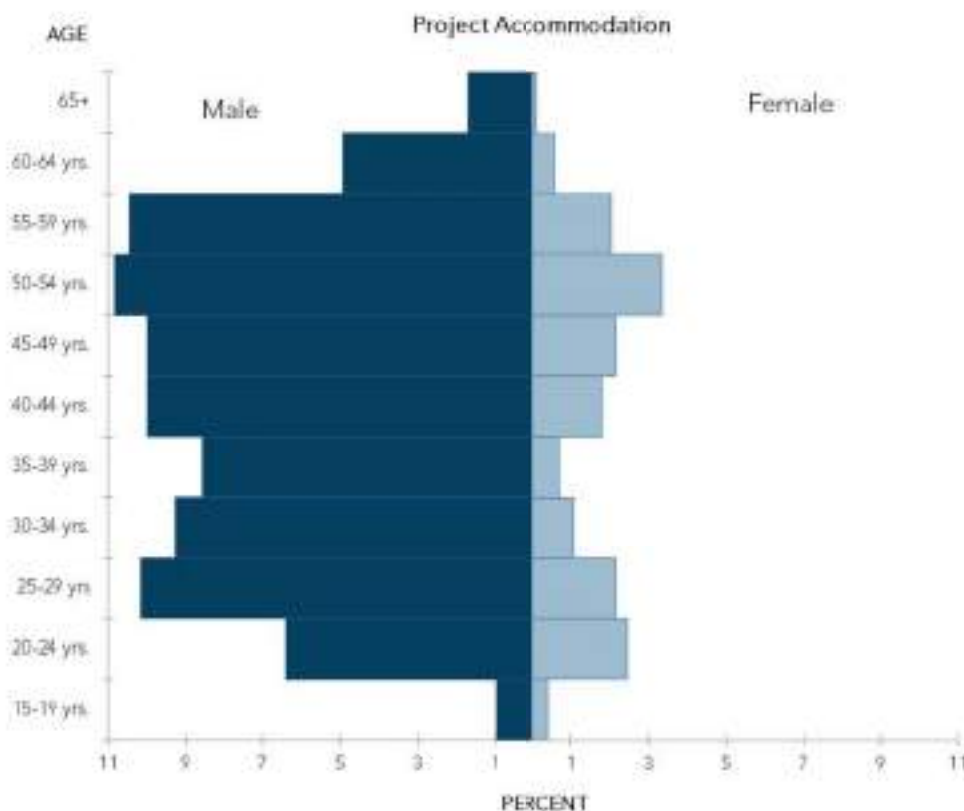
Note: Percentages may vary by +/- 0.05 due to rounding.

Age and Gender

Figure 42 illustrates an imbalance in the distribution between males and females. The ratio is approximately 5 males to every female, or a percentage of 82.9% males and 17.1% females. The imbalance may be related to type of employment (e.g., industrial, construction) associated with project accommodations. The age groups with the largest and smallest number of workers living in project accommodations are the 50-54 years and 15-19 years, respectively.

Of the 50-54 years category, 250 respondents included 191 males and 59 females. The 50-54 years category represents also the largest percentage of respondents, at 14.2%. The 15-19 years category represents 24 respondents with 17 males and 7 females. The 15-19 years category is the smallest percentage of respondents, at 1.4%. The percentage of respondents under the age of 20 and over the age of 60 is 8.7% (153). The percentage of the workers between the ages of 21 and 59 is 91.3% (1,610).

Figure 42: Age and gender pyramid for the population sample in project accommodations

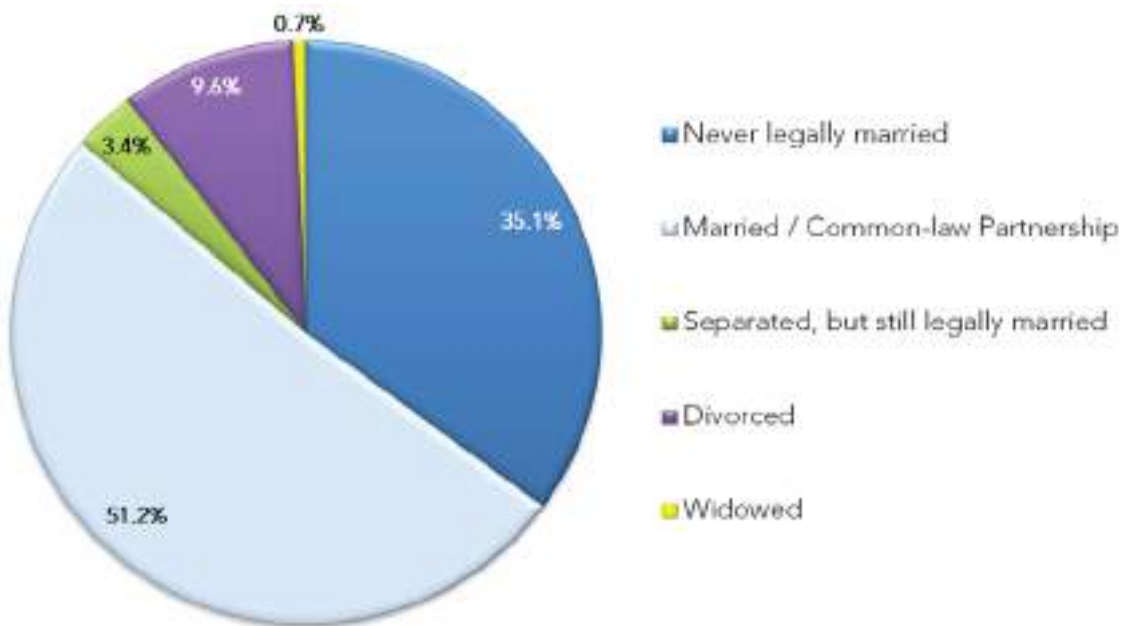


Note: Results based on response percent as shown in Table 43, Q1 and Q2. Reported percentages may vary as a result of rounding.

Marital Status

Chart 15 indicates that the percentage of respondents who are married or in a common-law partnership is 51.2%. The second largest percentage is respondents who have never been married (35.1%). Respondents who are divorced, separated but still legally married, or widowed make up the remaining percentages (9.6%, 3.4%, and 0.7%, respectively).

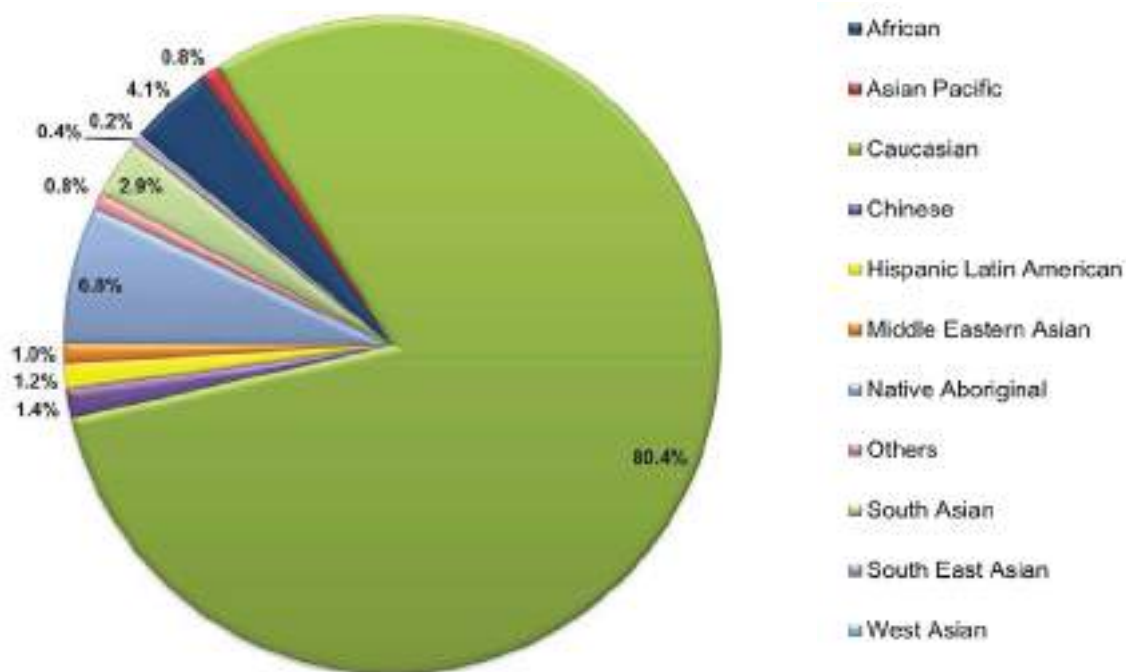
Chart 15: Percentage of the sample population by marital status in project accommodations



Note: Results based on response percent as shown in Table 43, Q12. Reported percentages may vary as a result of rounding.

While the project accommodations' population is comprised of many ethnic groups, most respondents identify themselves as Caucasian (80.4%), which covers several ethnicities including those of European origins (see **Chart 16**). The second largest percentage of respondents (6.8%) identify themselves as Native Aboriginal. No other ethnic group represents a percentage greater than 5% of the sample population surveyed.

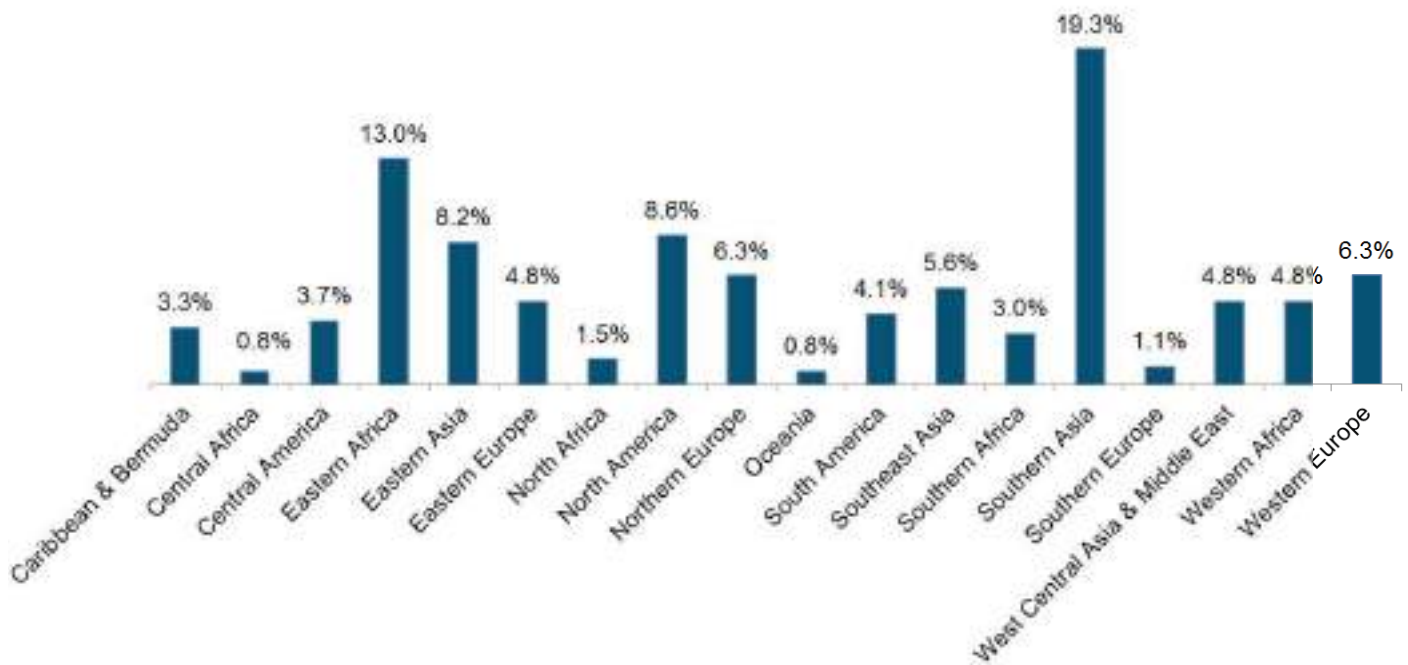
Chart 16: Percentage of the sample population by ethnic group in project accommodations



Note: Results based on response percent as shown in Table 43, Q3. Reported percentages may vary as a result of rounding.

Figure 43 shows the percentage of the sample population by region of origin. The highest percentage of respondents identify Southern Asia (19.3%) as their region of origin. When considering South East Asia, nearly one quarter (24.9%) of the respondents identify Southern and South East Asia as their region of origin. The second highest percentage identifies Eastern Africa as their region of origin (13.0%). The smallest percentages are Central Africa and Oceania, both reported as 0.8%. Eastern Africa is the second highest percentage in project accommodations and less than 5% in the rest of the Municipality.

Figure 43: Percentage of the sample population by region of origin in project accommodations



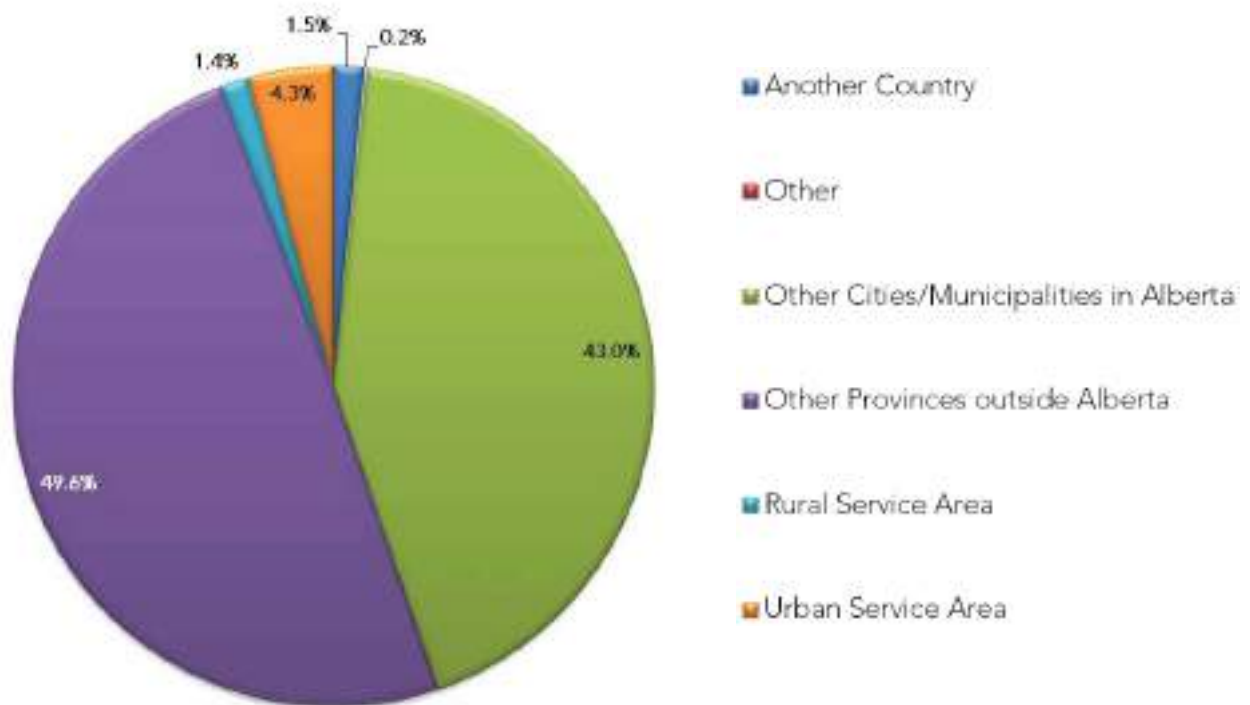
Note: Results based on response percent as shown in Table 43, Q4 and Q5. Reported percentages may vary as a result of rounding.

Primary Place of Residence

The percentage of respondents who identify other provinces outside of Alberta as their primary place of residence make up the largest group, at 49.6%. The majority of the remaining respondents identified other cities/municipalities in Alberta, but outside of the Municipality, as their primary place of residence (43.0%). The smallest percentage (0.2%), represents the category "Other."

The primary place of residence of respondents in project accommodations varies from the rest of the Municipality. In project accommodations, 94.3% of workers view their primary place of residence to be outside the Municipality.

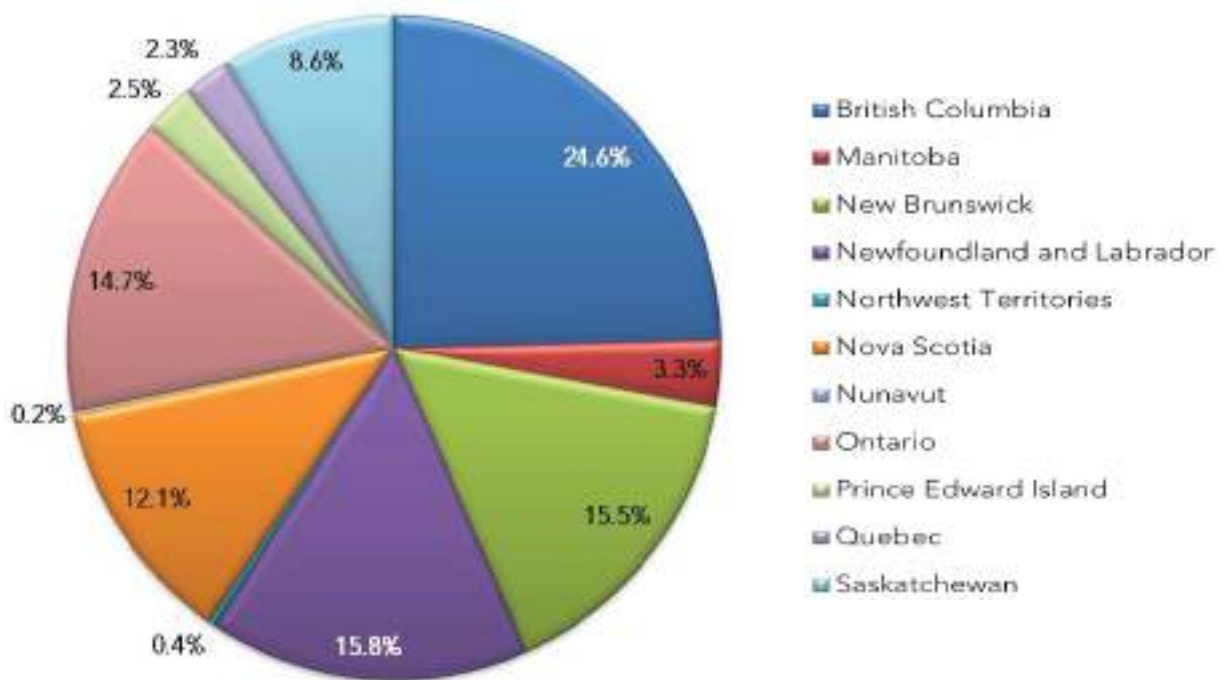
Chart 17: Percentage of the sample population by primary place of residence outside project accommodations



Note: Results based on response percent as shown in Table 43, Q6 and Q7. Reported percentages may vary as a result of rounding.

Respondents that lived in another province in the past year accounted for 30.9% of the population sample. Workers in project accommodations selected the province of British Columbia as the most common primary address (24.6%), followed by Ontario (14.7%), Newfoundland and Labrador (15.8%), New Brunswick (15.5%), Nova Scotia (12.1%), and Prince Edward Island (P.E.I.) (2.5%).

Chart 18: Percentage of the sample population that are residing in project accommodations by province

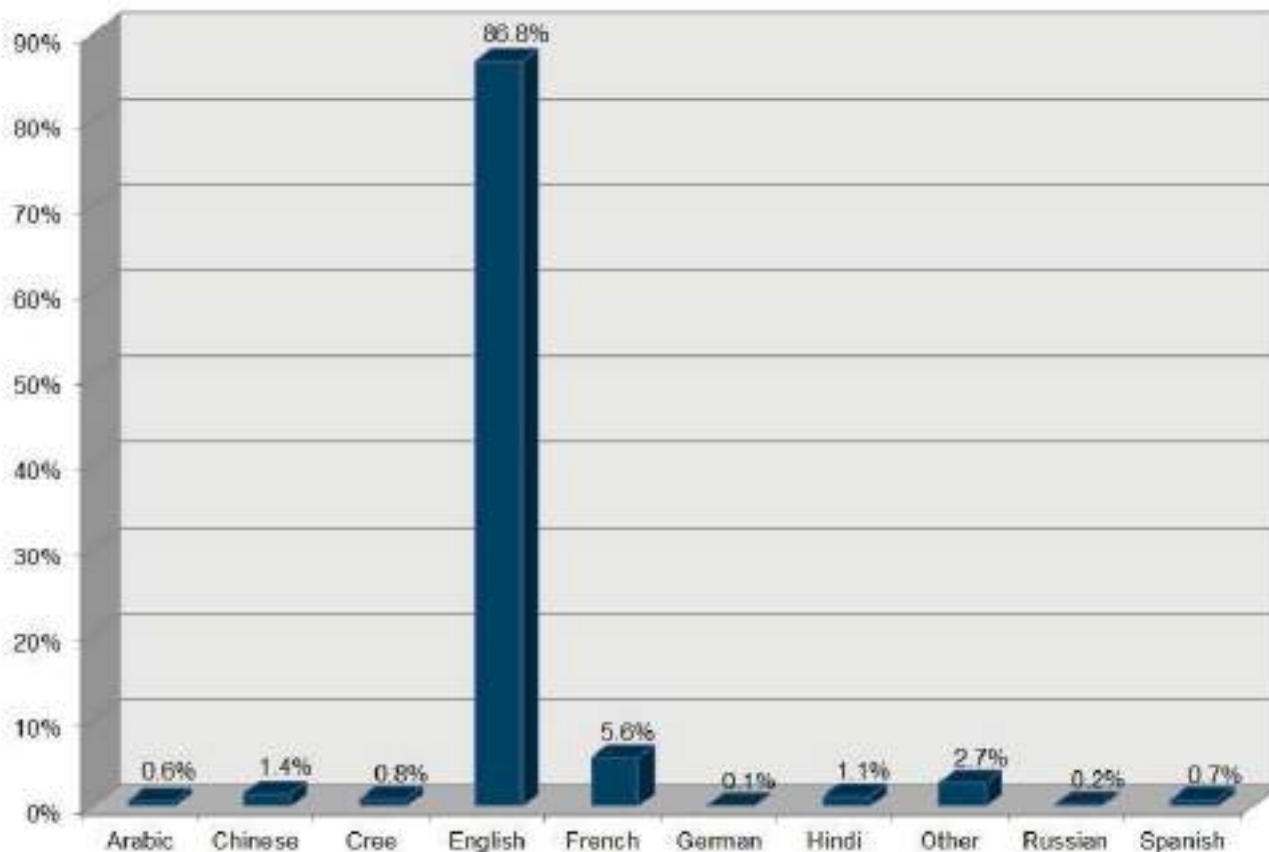


Note: Results based on response percent as shown in Table 43, Q10. Reported percentages may vary as a result of rounding.

Main Language Spoken

Figure 44 shows that the percentage of respondents who identify English as the primary language spoken is 86.8%. French is the next highest (5.6%), while a variety of other foreign and Native Aboriginal languages make up the remaining languages spoken. A small percentage, 2.7%, is represented by the category "Other." The distribution of languages spoken within project accommodations is similar to the Urban and Rural Service Areas, with English as the primary language spoken.

Figure 44: Percentage of the sample project accommodation population by primary language spoken

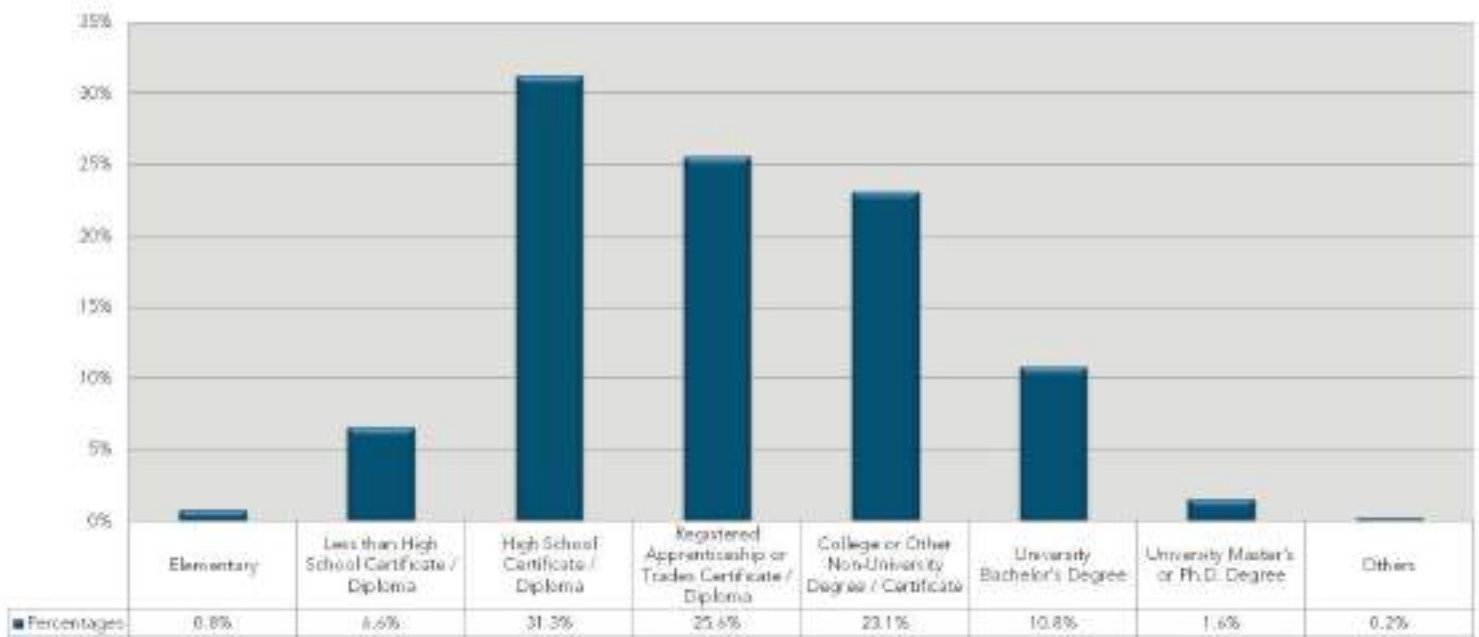


Note: Results based on response percent as shown in Table 43, Q20. Reported percentages may vary as a result of rounding.

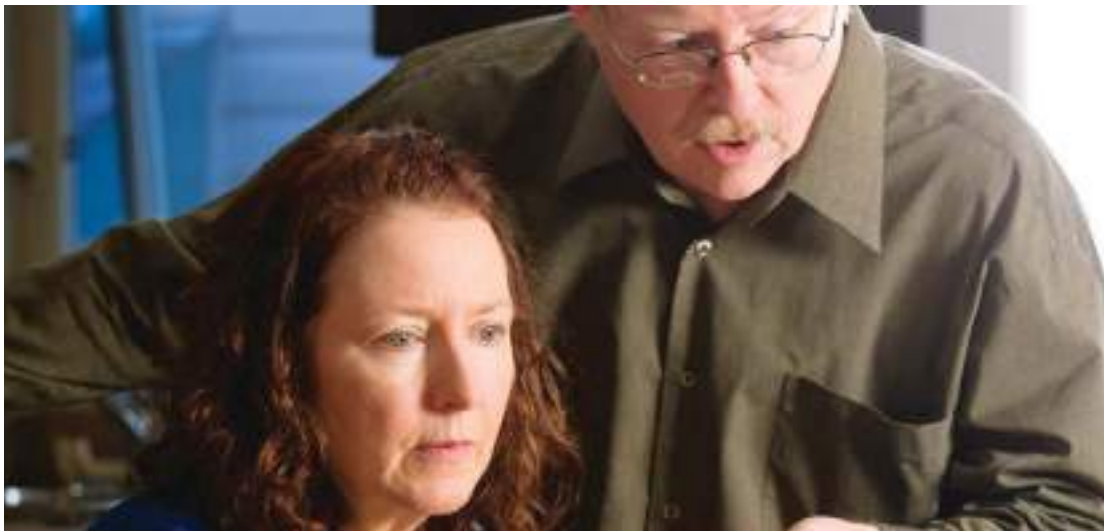
Education

Figure 45 illustrates the percentage of the sample project accommodation population by level of education attained. The proportion of workers in project accommodations with a high school diploma/certificate, is 31.3% and the proportion with less than a high school diploma/certificate is 7.4%. Workers with registered apprenticeships/trades certificates are 25.6% and 35.5% have a post-secondary degree.

Figure 45: Percentage of the sample project accommodation population by level of education attained



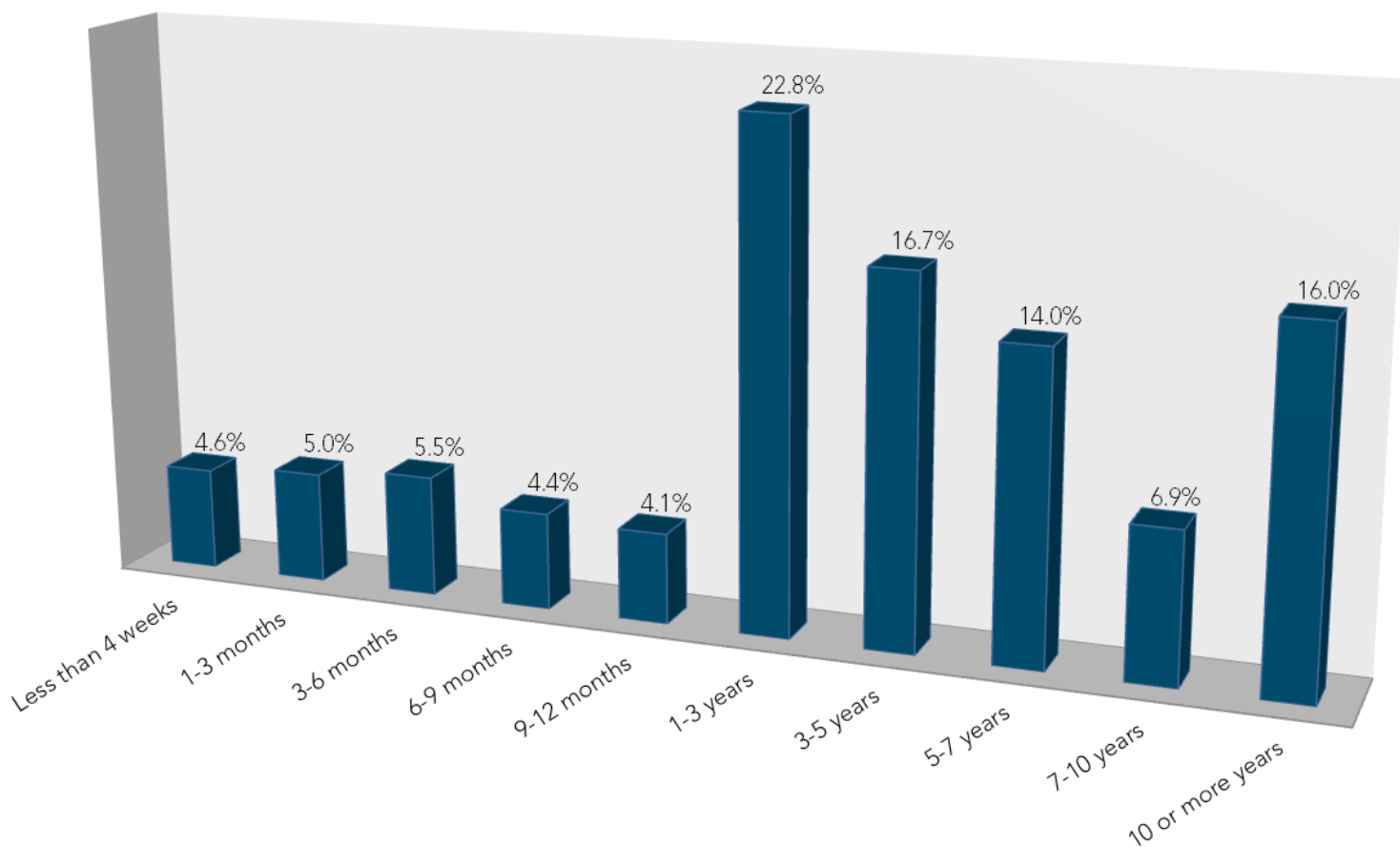
Note: Results based on response percent as shown in Table 43, Q11. Reported percentages may vary as a result of rounding.



Employment History

In project accommodations, 98.6% of respondents are employed full-time and 1.4% are employed part-time. The majority of respondents from the project accommodation sample reported having worked in the oil sands for over 3 years (53.6%). Of the total, 16.0% reported having worked in the oil sands for 10 years or more (see **Figure 46**). Almost a quarter of workers (23.6%) have worked in the oil sands for less than a year, while 4.6% have worked in the oil sands for less than a month.

Figure 46: Percentage of the sample project accommodation population by number of years worked in the oil sands

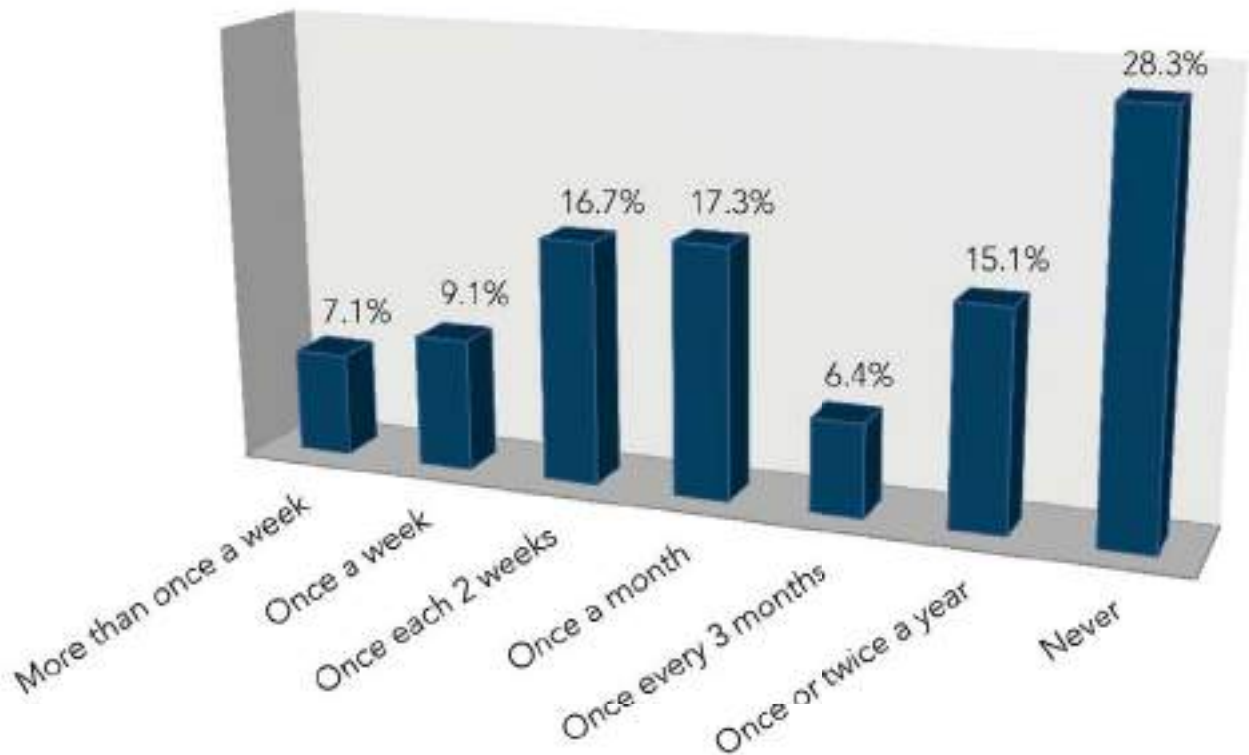


Note: Results based on response rate as shown in Table 43, Q16. Reported percentages may vary as a result of rounding.

Frequency of Visits to the Urban Service Area

Respondents were asked how often they visited the Urban Service Area (Fort McMurray). As shown in **Figure 47**, the largest percentage of respondents reported "Never" (28.3%), which may be attributed to the physical distance between the project accommodation and the Urban Service Area, management rules not allowing workers outside of project accommodations, or long shift work combined with direct fly-in and fly-out work schedules. However, over 50.0% of respondents stated they visited the Urban Service Area at least once a month. The next two largest rates were "Once a month" (17.3%) and "Once every two weeks" (16.7%). Conversely, 9.1% of residents said they frequented the Urban Service Area weekly, while 7.1% responded "More than once a week."

Figure 47: Frequency of visits to the Urban Service Area for the sample population in project accommodations

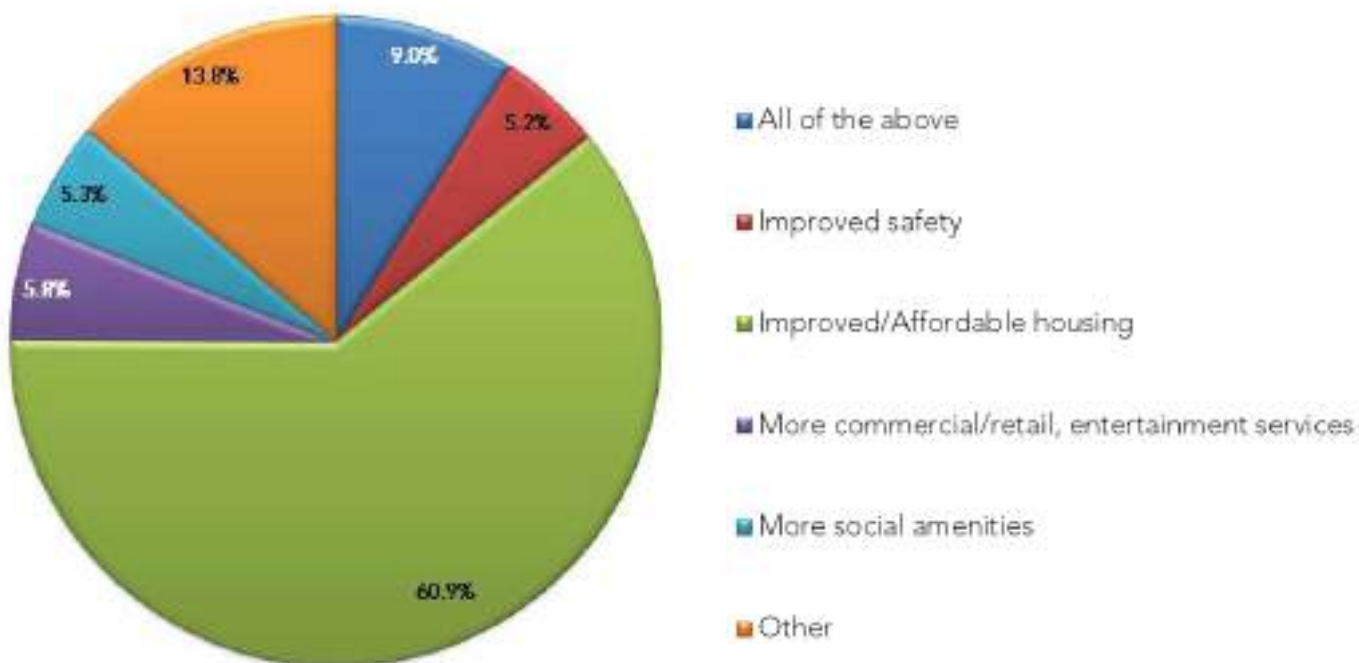


Note: Results based on response rate as shown in Table 43, Q17. Reported percentages may vary as a result of rounding.

Considerations for Moving to the Urban Service Area

Workers in project accommodations were asked what would make them consider moving to the Urban Service Area (Fort McMurray); the results are found on **Chart 19**. More than half of the respondents (60.9%) reported "Improved/Affordable housing" as their top consideration. The other options, excluding the option of "All of the above," were relatively similar in response percentage: "More commercial, retail, and entertainment services" (5.8%), "More social amenities" (5.3%), and "Improved safety" (5.2%). Moreover, 9.0% responded with "All of the above," while 13.8% responded with "Other."

Chart 19: Consideration for moving to the Urban Service Area by percentage of the sample population in project accommodations

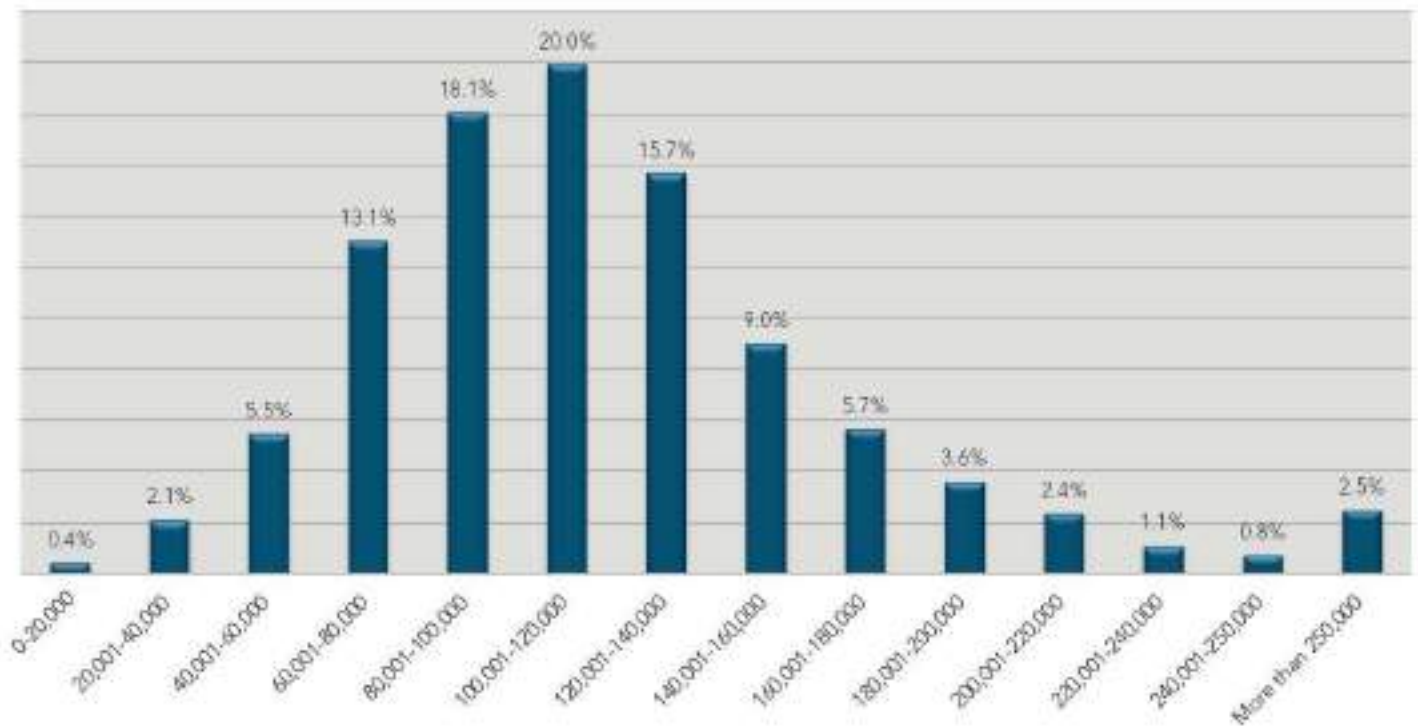


Note: Results based on response rate as shown in Table 43, Q18. Reported percentages may vary as a result of rounding.

Household Income

Workers in project accommodations were asked about their estimated gross annual income at the individual level. The majority of respondents (53.8%) reported earning between \$80,001 and \$140,000, as seen in **Figure 48**. Only 6.8% of respondents reported earning more than \$200,001 per year, with 2.5% of respondents making more than \$250,000 annually. Conversely, 8.0% of respondents made \$60,000 or less annually, with only 0.4% earning less than \$20,000 a year. The range with the highest percentage of respondents was \$100,001 to \$120,000 per year, at 20.0%.

Figure 48: Percentage of the sample population by income group in project accommodations



Note: Results based on response rate as shown in Table 43, Q19. Reported percentages may vary as a result of rounding.