



## **Alberta Quarterly Research Report Q2:09**

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Prepared for the Government of Alberta

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## Introduction

Harris/Decima is pleased to present the following report to the Public Affairs Bureau of the Government of Alberta. This report is based on a province wide survey of 1,011 residents of the province, conducted by phone, between September 10<sup>th</sup> and 17<sup>th</sup>, 2009. The margin of error for this study is 3.1%, 19 times out of 20.

The objectives of the research study were to:

- Assess economic perceptions and expectations of provincial residents;
- Assess their satisfaction with the performance of the provincial government at a general level and with respect to a number of detailed areas of policy;
- Assess public priorities for government focus; and,
- Assess reactions to a number of policy ideas or initiatives that could be considered by the government of Alberta.

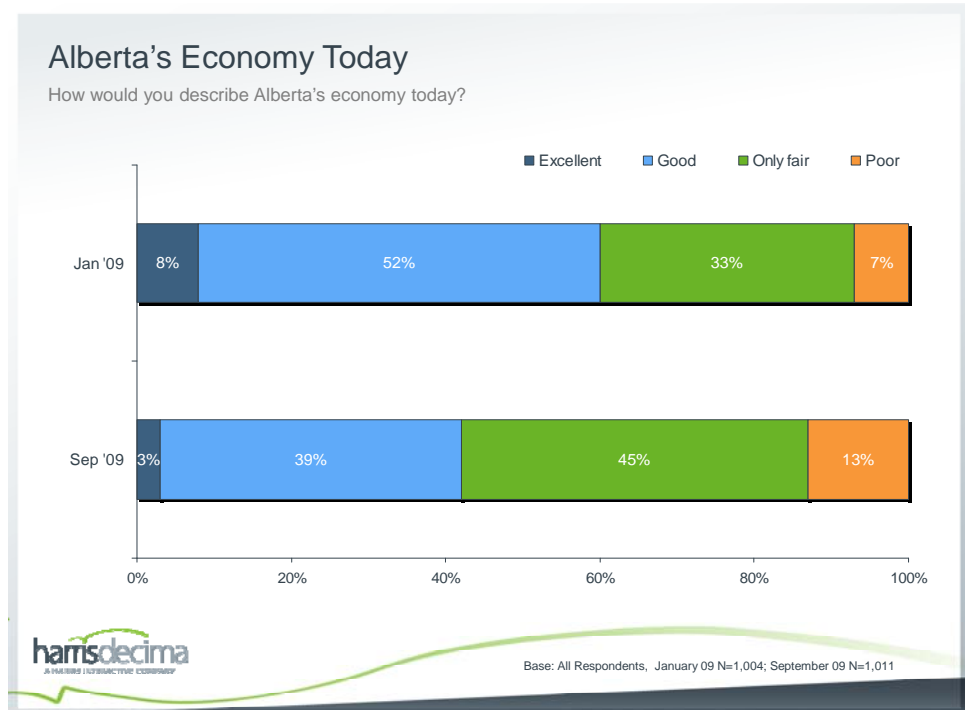
### Methodology

Sample size	
<b>Total</b>	<b>1,011</b>
Region	North (93)
	Edmonton (330)
	Central (124)
	Calgary (345)
	South (119)
Field dates	September 10 to September 17, 2009
Average Survey Length	22 minutes

## Research Findings

### State of the Economy

Perceptions of the health of the economy of the province have dimmed somewhat as the recession gathered momentum from the January measurement point. Today, 42% of Albertans say the economy is in excellent or good shape, while 45% say it is in fair shape and 13% say it is poor. Since January, the major movement has been a decline in “good” and an increase in “fair” ratings.

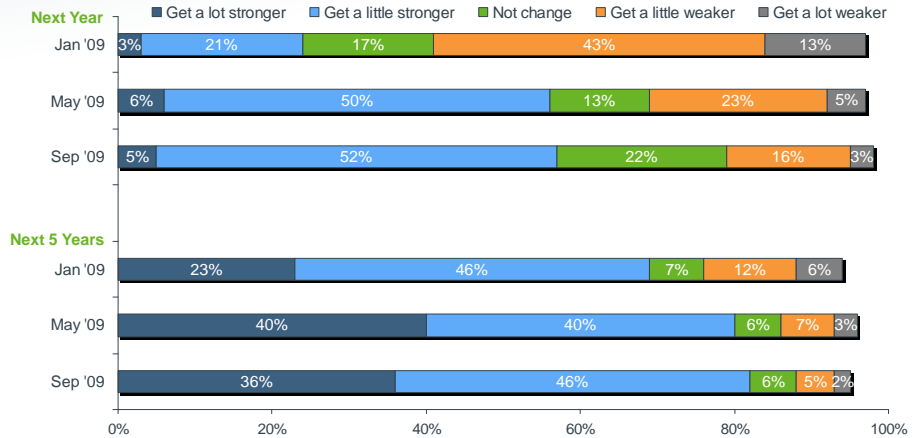


While current economic assessments may have slipped somewhat, optimism about the economic future of Alberta remains very robust. 57% expect things to improve over the coming year, while only 19% foresee deterioration. For the five year outlook, bullish sentiment is running at 82%, while bearishness registers only 7%.

Worth noting is the fact that optimism about the economy of Alberta cuts across all subgroups of the province. In other circumstances, deep economic downturns have shown a greater potential to produce insecurity and socio-economic schisms.

### Future State of Economy – Next Year / Next Five Years

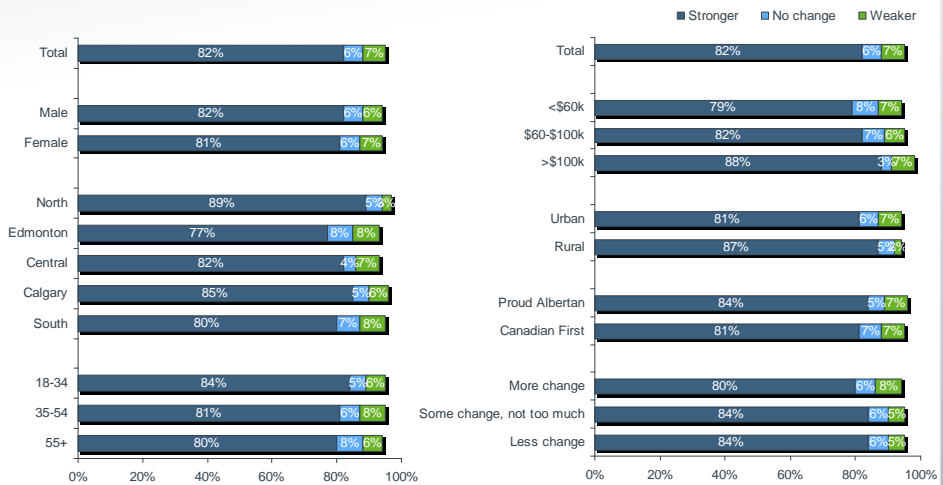
Over the next year/Over the next five years, do you think the economy of the province will get a lot weaker, a little weaker, not change, get a little stronger or get a lot stronger?



Base: All Respondents, January 09 N=1,004; May 09 N=1,005; September 09 N=1,011

### Future State of Economy – Next Five Years

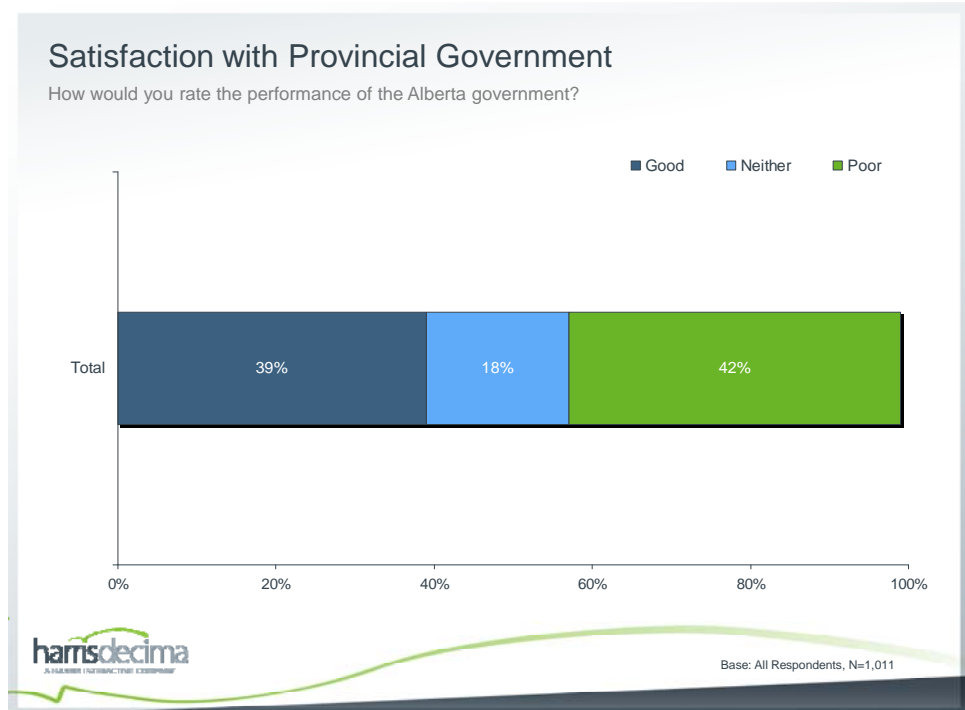
Over the next five years, do you think the economy of the province will get a lot weaker, a little weaker, not change, get a little stronger or get a lot stronger?



Base: All Respondents, N=1,011

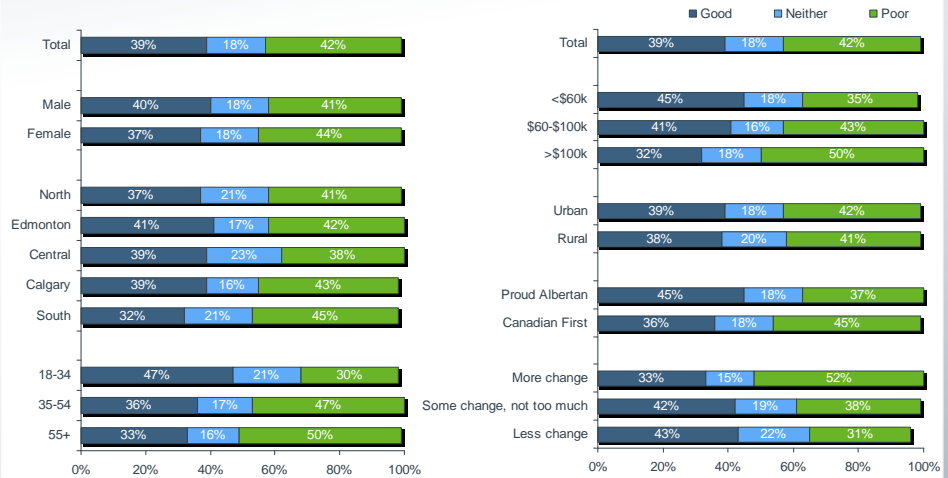
### Overall Satisfaction with Government Performance

Roughly 40% of residents of the province rate the performance of the Alberta government as good, another 18% are undecided, and 42% consider the performance poor. Older people and those with higher levels of income tend to show more dissatisfaction.



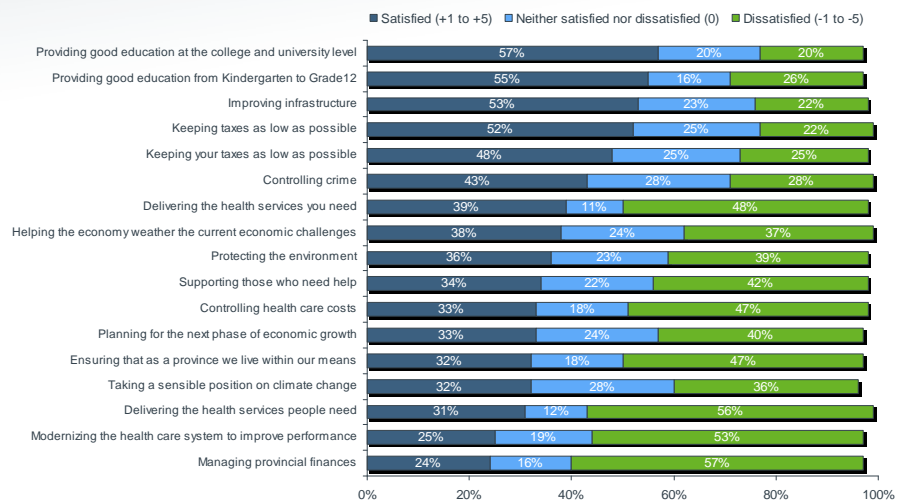
## Satisfaction with Provincial Government

How would you rate the performance of the Alberta government?



## Provincial Performance Measures

How satisfied are you with the performance of the provincial government in each of the following areas?



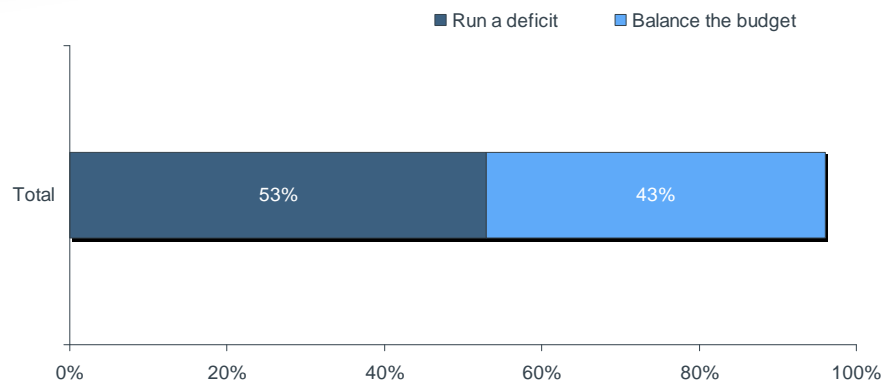


## Fiscal Policy

While it is generally true that residents of Alberta tend to be among the most fiscally cautious Canadians, most continue to offer the government latitude to run a deficit for a period of time until growth resumes.

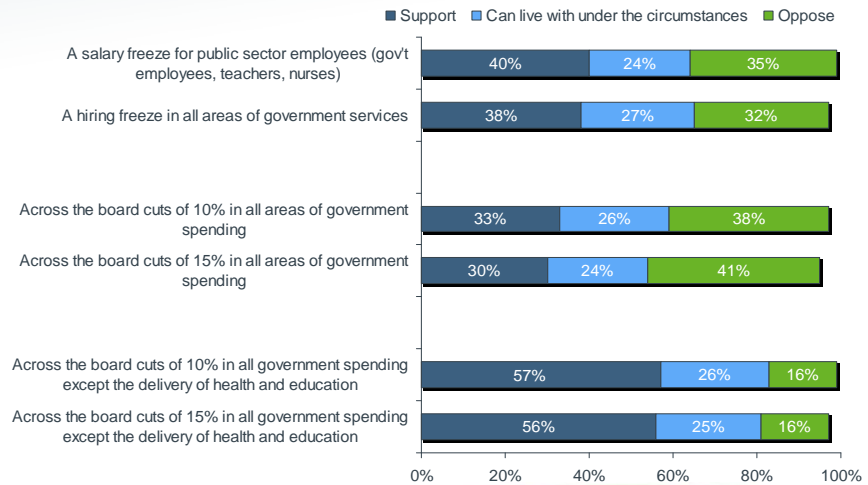
### Alberta Fiscal Options

As you may know, the provincial government has said it will face a deficit in the coming year. In general, would you prefer to see the provincial government run a deficit and wait until economic growth resumes bringing the budget back into balance, or find ways to balance the budget by cutting spending?



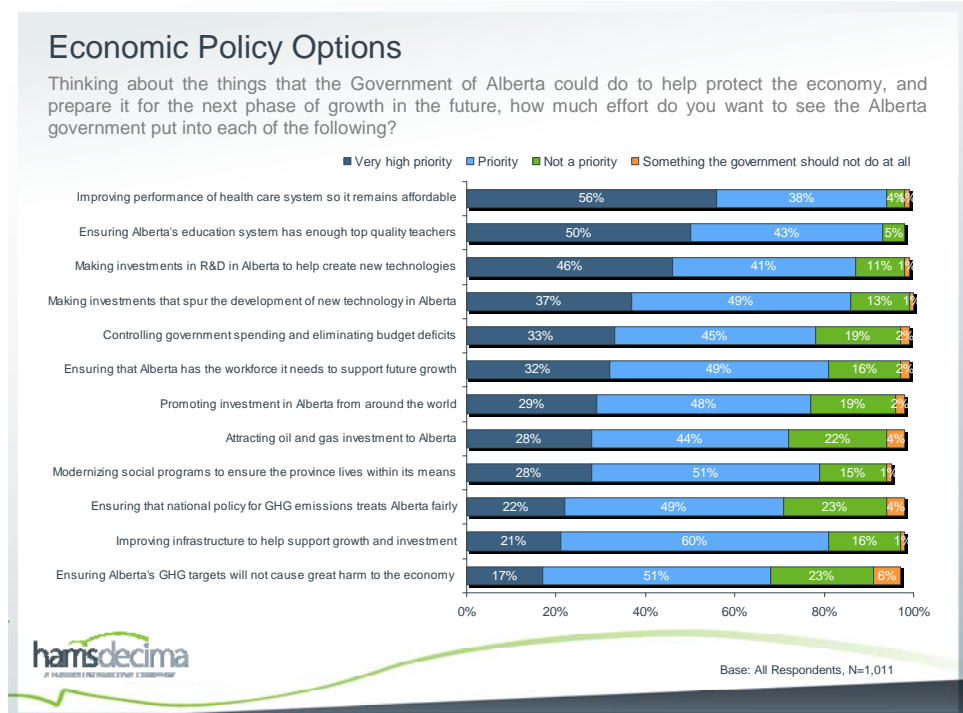
### Alberta Fiscal Options

To reduce the size of the deficit, please tell me if you support, oppose, or can live with under the circumstances, each of the following options?



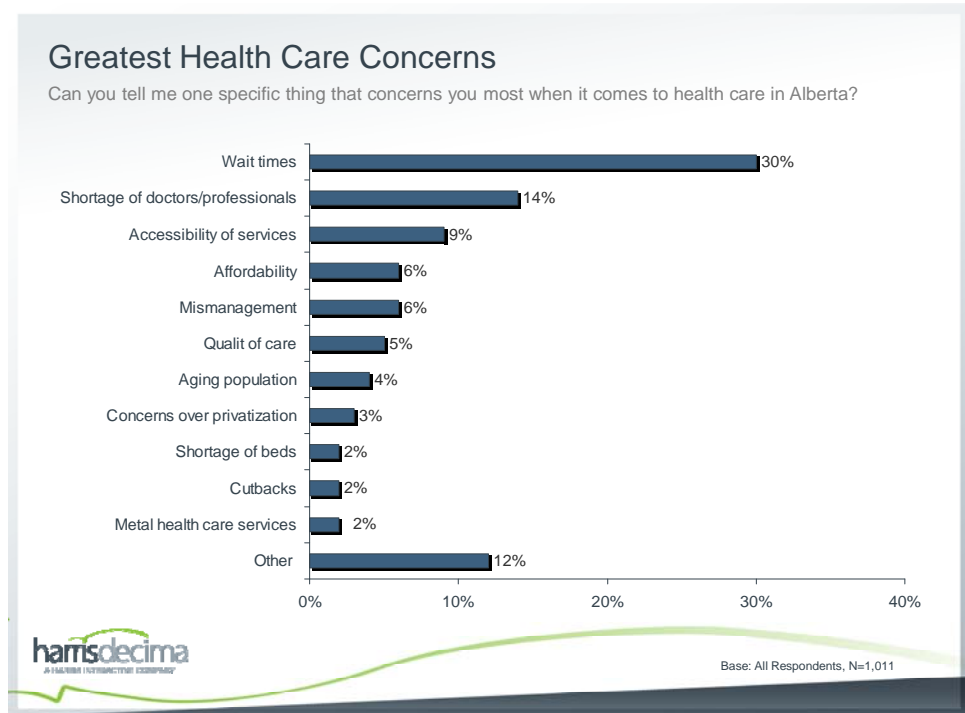
## Economic and Social Policy

This survey explored a number of possible provincial priorities within the context of things that would help protect the economy and prepare it for future growth. The results reveal a strong belief that affordable health care, first class education, investments in R&D and technology are among the most widely popular ideas among a dozen tested.



## Health Care

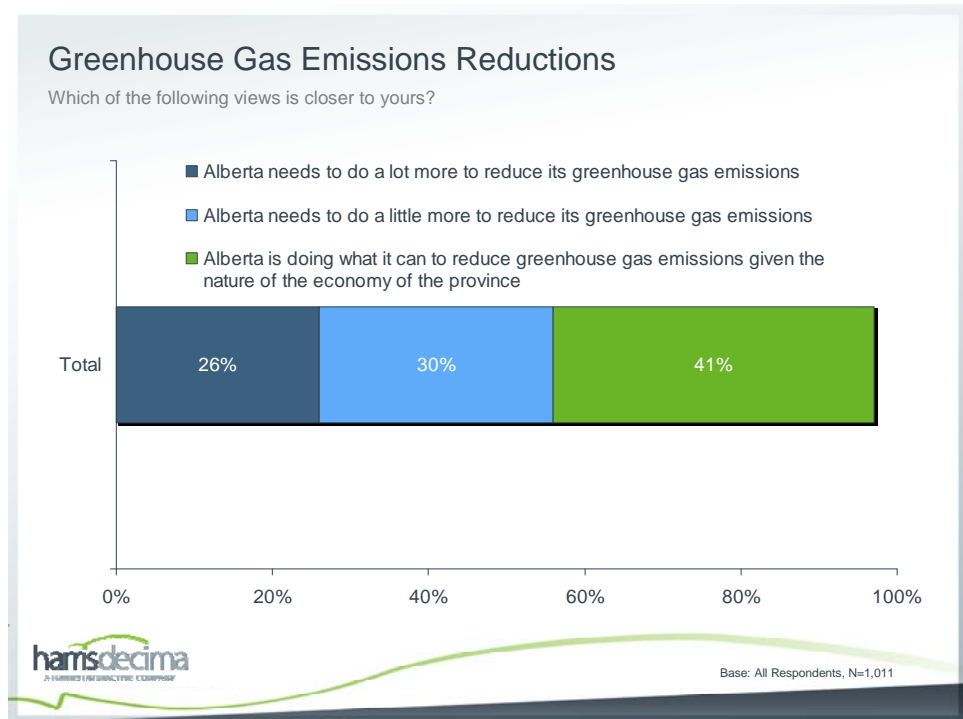
Several results reported so far indicate that health care is among the most pressing concerns for Albertans, and one of the most important priorities for the provincial government.



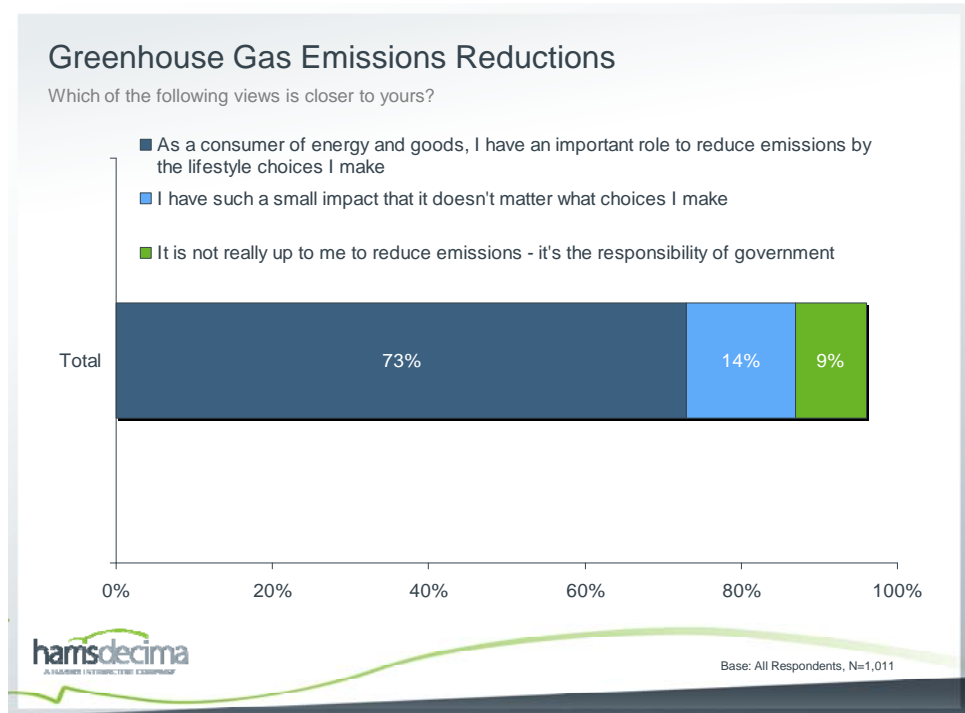
## Greenhouse Gas Emissions

Past research has demonstrated that Albertans care about the environment and also care about the environmental reputation of the province. While wanting to see more done, there is a desire to ensure that the province is not unfairly characterized and that policy choices are rational rather than driven by reputation anxiety alone.

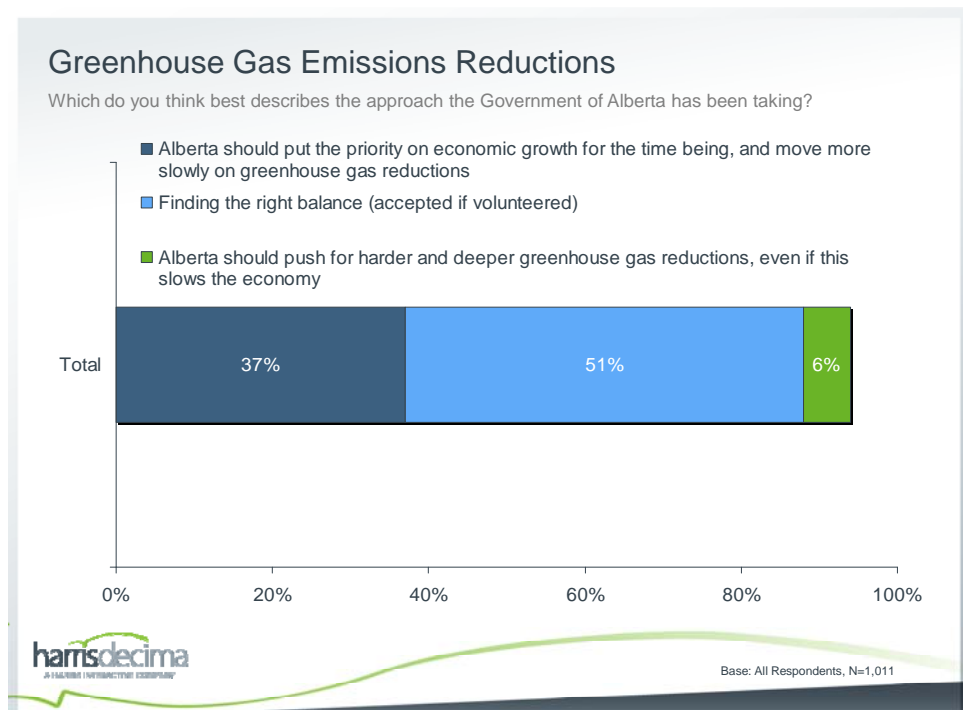
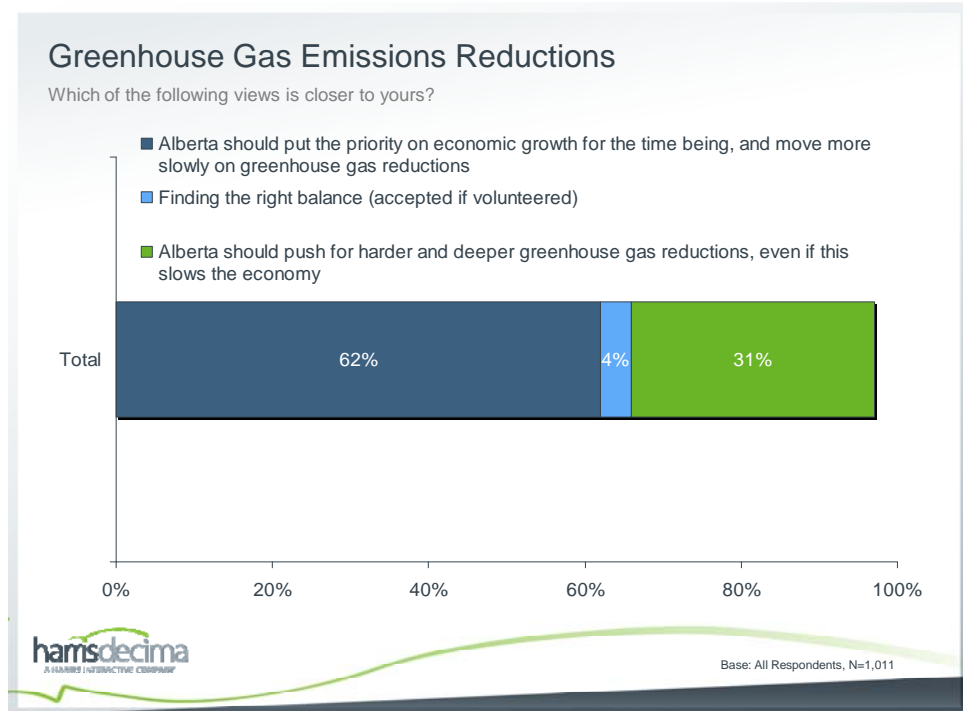
In this study, one in four expressed the view that Alberta needs to do a lot more to reduce its greenhouse gas emissions, 30% said a little more, and 41% said Alberta is doing what it can given the nature of the economy.



It is important to note that when people talk about the need for environmental improvement these days, they accept quite readily that they cannot hold others responsible without taking responsibility for their own role. Fully 73% say that “as a consumer of energy and goods, I have an important role to reduce emissions by the lifestyle choices I make”.



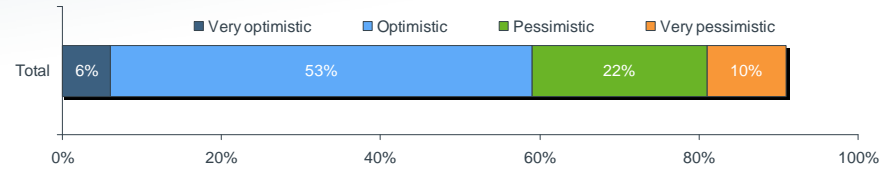
Most people express a desire to see the push to reduce greenhouse gases linked to the pace of economic growth, and would prefer that the province stress growth for the time being and move more slowly on GhG reductions. Most feel the government is finding the right balance today.



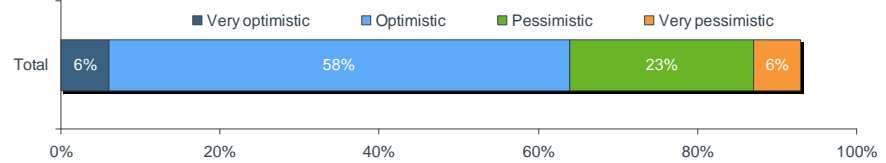
Most people are optimistic that carbon capture and storage will be an effective way for Alberta to reduce emissions without causing harm to the economy.

### Optimistic / Pessimistic Capture and Storage Works

Would you say that you are very optimistic, optimistic, pessimistic or very pessimistic that carbon capture and storage technologies can greatly reduce emissions from oil sands development?



Would you say that you are very optimistic, optimistic, pessimistic or very pessimistic that carbon capture and storage technologies can allow Alberta to reduce greenhouse gas emissions without causing harm to the economy?



## Conclusions

Current sentiment in the province has dipped somewhat in terms of satisfaction with the direction of the province and confidence in the current health of the economy. At the same time, optimism about the future performance of the economy remains strong.

Feelings towards the provincial government reveal some softening. Assessments for education remain strong, while health care and fiscal management ratings are lower.

Residents afford the government plenty of flexibility when it comes to ways to manage fiscal issues: most say they would accept a deficit, and would also accept a number of measures to reduce spending.

When it comes to health care, people are concerned about affordability and access, but clearly put access at the top of the list of priorities.

On the environment, Albertans feel that the province must walk a balanced approach, looking to reduce emissions while taking care not to harm the economy. There is a broad perception that the government has been finding that balance so far.