



Research Summary **Branding Alberta Initiative**

March 2009

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Introduction

Harris/Decima is pleased to present the following research summary to Calder Bateman and the Public Affairs Bureau of the Government of Alberta.

This document serves to summarize key findings of a comprehensive research program that began last fall in September 2008. In that time, we have conducted 48 focus groups and four surveys with a number of key stakeholder audiences in Alberta, Canada and the US.

The primary purpose of the research was to help support the Branding Alberta Initiative. The Government of Alberta had decided to launch an effort to ensure that perceptions of Alberta were aligned with the following goals:

- Helping promote inbound investment into the province
- Helping support efforts to attract the labour force the province will need
- Helping support tourism promotion
- Helping support the marketing of Alberta products and services
- To develop a brand strategy for Alberta that will reinforce a positive, meaningful image of Alberta and increase awareness of Alberta as a great place to live, work, play and invest.

Research Approach

Our work on this Initiative spanned three research phases:

1. An initial, exploratory, phase of **Discovery Research**; the centerpiece of which was a comprehensive series of focus groups across Alberta, Canada and the United States.
2. Following this initial phase of qualitative work was a robust program of **Measurement Research** involving three surveys in Alberta, Canada and the US.
3. The third piece of research, focused on **Brand Testing**, involved both qualitative and quantitative research predominantly in Alberta; the purpose of which was to explore the concepts and themes that emerged from the previous two phases of research.

Discovery Phase

We launched the research program with a qualitative phase of **26 focus groups with informed citizens, 3 focus groups with young adults and 4 focus groups with business leaders**. “Informed citizens” are those who tend to follow current affairs and get involved in public and community affairs. In our experience, respondents who have these characteristics provide more detailed input in qualitative sessions, without distorting from a representativeness standpoint. Additionally, the focus groups with Albertans were segmented by income; the groups with Canadians were segregated to ensure a clear understanding of those with neutral to negative views of Alberta as well as those with positive views of Alberta. The focus groups in the United States were conducted among Americans with at least some level of familiarity with Alberta.

Measurement Phase

The qualitative research was followed by robust program of quantitative research involving surveys in Alberta, Canada and the United States. The surveys were conducted among random samples of residents in Alberta (800); US (800); and, Canada (1,200). The margins of error and survey field dates were as follows:

Jurisdiction	Margin of Error	Field Dates
Alberta (800)	+/-3.5%	October 23 – November 2
US (800)	+/-3.5%	October 22 – November 1
Canada (1,200)	+/-2.8%	October 15 – October 25

Brand Testing

The third phase of research, to test the identity and language of the strategy, involved both a series of focus groups and a survey.

We began with a series of eight qualitative sessions in Edmonton, Calgary, Stettler and Toronto. As with the previous phases of research, the groups were conducted among informed citizens. Additionally, in each Alberta location, two of the sessions were conducted with people who self-identify as Albertans first, the other two Canadians first, as this segmentation has proven highly important in determining feelings towards the direction of the branding of the province. In Toronto, all four groups were conducted with people who have a mixture of positive and negative feelings towards the province.

The format for the groups was mini-focus groups (4-5 participants as opposed to the normal 8-12) to allow for crisp, in-depth probing and equally important, to limit potential effects of “groupthink”. In each city, we conducted four 45-minute sessions. To confirm the indications from the qualitative research, we moved to a survey to test the options for a brand icon, tag line and images for fit with the objectives of the branding strategy.

The methodology we selected was online interviews in order to allow respondents to view illustrations of the icons and images. In total, we conducted 250 interviews using this methodology with Albertans, using a questionnaire of 10 minutes in length.

Harris/Decima designed and directed all elements of each research phase including design, moderation/interviewing, data collection, tabulation, analysis and reporting. Our team was led by Bruce Anderson and managed by Stephanie Constable; both heavily involved in all aspects of this research from design and moderation to analysis and reporting. The discussion guides and survey questionnaires were prepared by Harris/Decima in close consultation with the clients and approved by the clients.

Summary of Findings

Discovery – Qualitative Phase

The initial round of focus groups revealed the following:

- Most Albertans feel that the initiative to brand Alberta is well timed and of significant value. They felt that there were important benefits to having a strong positive image of the province, outside Alberta, and also important benefits within the province, especially in terms of a rallying point and sense of common values. This was considered increasingly important given the degree of change that the province had experienced.
- While some felt a first inclination that the brand essence of Alberta should be tied to its history, it became clear that the stronger pull was towards a future orientation, when it comes to describing the essence of Alberta. On the whole, the groups revealed that people feel change is good for Alberta, and that the ideal brand concept for Alberta should be highly aspirational, embrace change, and focus on the Alberta that people are building more than the Alberta that was.
- When it comes to the touch points that are most powerful for Albertans, the focus tends to be in three areas: the natural and physical attributes; the economic attributes; or the human/attitudinal attributes of the province. While people feel all three are central to Alberta's identity today, the most powerful are the attitudinal attributes. Albertans self identify strongly as hard-workers, entrepreneurial, self-reliant, mutually supportive, friendly, down to earth, practical and optimistic.
- Many Albertans also felt that the province had, somewhat unfairly, acquired a reputation for being less tolerant, less compassionate, and less environmentally careful as ideal. While some argued that the problem was one of perception, some also felt the reality was that Alberta had had some room to improve in all three respects.
- In the US, perceptions of Alberta were relatively loosely formed, as would be expected. The tendency was to assume that Alberta was a vast, cold place, of considerable beauty, inhabited by the same kind of hard-working, down to earth people that could be found in neighboring states. Few were aware of Alberta's economic strength and opportunities. Not many were familiar with the role Alberta plays in providing secure energy to meet America's needs, and few were really aware of the debate about the environmental impacts of the oil sands development.

- In other parts of Canada, views of Alberta were mostly positive, but with some negative edges as well. In Toronto, we found clear evidence of frustration that Alberta was becoming a stronger pillar and a more central agent in terms of Canada’s economy, eclipsing Ontario in some respects. In Toronto and Vancouver, there were also considerable perceptions that Alberta was a fairly right wing, or conservative place, and that compassion, open mindedness and tolerance was not always what it could or should be. There was no debating whether Alberta was strong economically, or whether Albertans possessed a strong entrepreneurial streak.

The results of this phase generated many important hypotheses that influenced the design of the questionnaires for the quantitative study which followed. This phase illustrated that there was considerable demand for a rallying, positive, aspirational brand initiative among Albertans, and that there was useful work to do in creating a clearer understanding of Alberta’s economic potential in the US, and also providing people in other parts of Canada with a more positive, contemporary and balanced understanding of the province of Alberta.

Exploration of the values and attributes associated with Alberta revealed a mix of highly positive and somewhat negative impressions. The most common references both in positive and negative terms are listed below.

Positive Brand Attitudes

- Confident
- Ambitious
- Hard-working
- Community
- Individualistic
- Generous
- Prosperous
- Lots of opportunity
- Natural resources
- Environmentally beautiful
- Friendly
- Freedom
- Bold
- Achievers
- Diverse
- High incomes

Negative Brand Attitudes

- Smug
- Cocky
- Self-satisfied
- Self-centered
- Standoffish, Texas North
- Oil addicted
- Environmentally uncaring
- Condescending
- Careless
- No controls

- Uncaring
- Greedy
- High cost of living
- Narrow
- Money centered

The results illustrate that the most potent items have to do with perceptions about attitude. All audiences tend to agree that Alberta has essential and positive physical, natural and economic ingredients. The difference between those who think Alberta is great today and those who feel it has a fair bit of room to improve more often than not is expressed as a function of perceived attitude.

The most important positives to accentuate which emerged from this body of work were the idea that Alberta is full of people who relish the freedom to create their own future, surrounded by a culture that embraces and rewards a spirit of achievement. The issues that could usefully be dispelled are about whether Albertans are too preoccupied with money, are indifferent towards the environment and the disadvantaged, and closed to non-conservative or non-conforming points of view and cultures.

Measurement – Quantitative Phase

Below is a summary of the highlights from the quantitative phase, dealing first with the results from other parts of Canada, then the US, then Alberta.

Other Canadians

- Most Canadians (62%) have opinions or feelings about Alberta, with one in five (22%) saying that they have strong perceptions or feelings, and just over one in three 35% saying they have hardly any feelings at all.
- When asked to characterize their feelings on a scale of 1 to 100 (100 meaning very positive), about one in ten rate Alberta a 100, and about the same number said that Alberta was somewhere under 50. Further probing of attitudes reveals that the size of the segment that has some negative feelings towards Alberta is somewhat larger than 10%.
 - 40% feel Albertans don't really care much about the rest of Canada
 - 27% say that Albertans are greedy
 - 25% say that Albertans are arrogant
- Further exploration of the perceived attributes of Alberta revealed:
 - Above all else, Alberta is seen as a place of **“natural beauty”**. The next strongest associations were **“lots of opportunity”**, and **“lots of possibilities”**. **“Entrepreneurial”** **“aspiring”**, and **“spirit of achievement”** were also closely associated with Alberta. At least half also said that the words **“freedom”**, **“evolving”** and **“friendly”** were associations they could identify strongly.
 - The weakest associations were for **“environmentally friendly”** and **“environmentally responsible”**. In each case, more than a third said these attributes don't apply much or at all.
 - There was some ambivalence or mixed opinion about whether **“helpful”**, **“generous”**, **“conscientious”**, **“culturally diverse”**, and **“open minded”** were attributes that could be closely associated with Alberta.

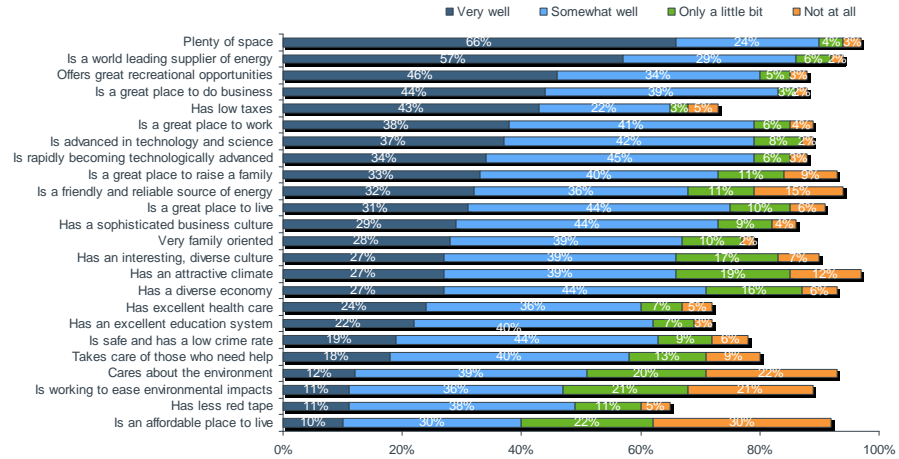
In sum, these patterns suggest an overall picture that emerges is one of a place that is considered very beautiful, economically vibrant, with a culture that is highly entrepreneurial. Alongside this are concerns about the sense of responsibility for protecting the environment, and whether the political culture skews so strongly towards self reliance that it pays too little attention to generosity and compassion, and is closed to different ways of thinking.

The study tested a total of 24 different reputation statements to further explore perspectives about the province. The findings reveal:

- The province is very widely seen as having plenty of space, plenty of recreational opportunities and as a world leading supplier of energy.
- There is a broad sense that the province is a *great* place to work and live, but there are significant doubts about whether the province is an *affordable* place to live. This is likely one reason why the perceptions of Alberta as a “great place to raise a family” are a little lower.
- Alberta is broadly seen as a great place to do business, but worth noting there is some uncertainty about whether it offers less red tape. While most people felt that Alberta is a low tax jurisdiction, a notable number also didn’t feel they could offer an opinion about taxes in Alberta.
- There is a strong consensus that the province is advanced in terms of science and technology or rapidly becoming so.
- While those with an opinion were decidedly of the view that Alberta has an excellent health and education system, there were a fair number again who felt they could not offer a considered opinion about this.
- The most prevalent negatives (more than one in five saying this applies to Alberta a little bit or not at all) were in the following areas:
 - Affordability
 - Environmental care
 - Climate
 - Diversity of economy
 - Diversity of culture
 - Takes care of those who need help
 - Great place to raise a family

Alberta's Reputation

Tell me if you think the statement applies to Alberta, very well, somewhat well, only a little bit, not at all.



US Residents

In the US, the situation is different. While many people don't have a strong or well defined view of Alberta, the general perception of the province is similar to US perceptions of Canada as a whole: a spacious, beautiful, environmentally healthy, and inhabited by friendly people.

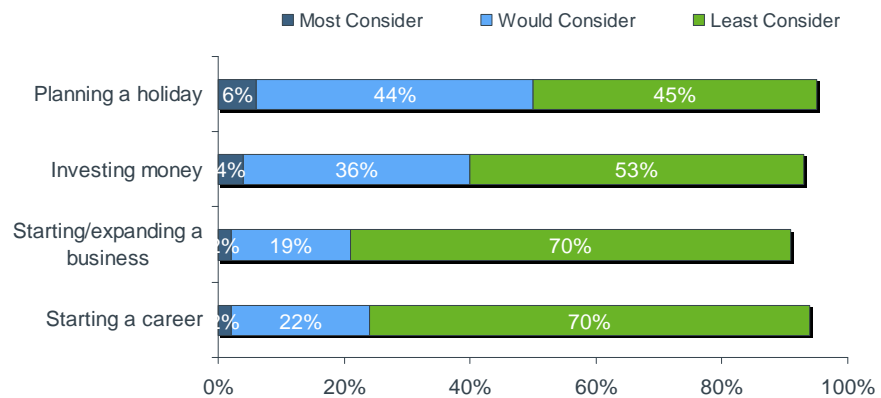
However, it is also clear that the idea of Alberta as a place of great opportunity and a good place in which to do business and build a life is less well known.

- Just over one in four Americans indicate that they are very (2%) or somewhat (26%) familiar with Alberta, while 27% say they are not too familiar and 45% say not familiar at all.
- When asked to characterize their feelings on a scale of 1 to 100 (100 meaning very positive views), in general responses were fairly positive. 13% rated Alberta a 100, only 5% below 50.
- When asked how they feel about Alberta as a place to holiday, invest, do business, look for a job or pursue a career, the results show that about half are potential tourists, about 40% potential investors, and about a quarter would consider Alberta as a place to build a business or career. These results illustrate that there is a segment of the US public that is

open to the idea of building businesses or careers in Alberta, but that it is reasonable to assume that these numbers can be improved upon. As well, perhaps the most important point here is that Alberta’s economic opportunities appear to be the least well appreciated aspect of the province.

Considering Alberta

Is Alberta among the places you would most consider, a place you would consider, or among the places you would least consider for each of the following reasons?



- The study tested 14 different attributes to see which ones respondents felt described Alberta better than others. As was the case among Canadians, Alberta is seen first and foremost as a place of “**natural beauty**”. The next strongest associations were “clean environment” and “freedom”.
- For all of the other items, the plurality response was that the attribute applied only somewhat to Alberta, suggesting that people weren’t sure this was part of what makes the province unique. Worth noting is that among the weakest associations were with “innovative”, lots of opportunity” “entrepreneurial”, “spirit of achievement”, and “aspiring”.

In sum, the attributes Americans associate with Alberta are in some important ways different from those observed among Canadians. Americans tend not to have a clear sense of the economic opportunity that exists in Alberta and feel that a clean environment is one of the hallmarks of the province. In Canada, the economic prowess of Alberta is visible, but so are concerns about the environmental commitment of the province.

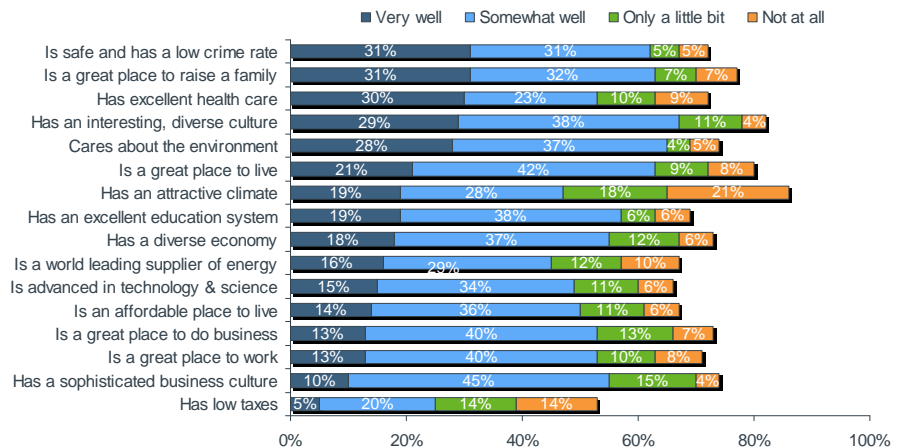
The study tested 16 different reputation statements to further explore perspectives about the province. The findings reveal:

- The province is very widely assumed as being a great place to raise a family, safe with a low crime rate, excellent health care, and an interesting and diverse culture.
- 65% say Alberta cares about the environment, compared to 9% who harbour some doubts. Despite Alberta's role as a leading provider of oil and gas for America, only 45% see Alberta as a world leading supplier of energy.
- By a margin of 63%-17%, Americans feel Alberta could be a great place to live. By a narrower margin, it is assumed to be an affordable place to live (50%-17%), and a great place to work (53%-18%).
- Most are of the view that Alberta has an excellent education system (57%-14%), but it is worth noting that these numbers trail perceptions of the quality of the health care system in terms of the strength of opinion.
- Alberta is not overwhelmingly seen as a great place to do business (53%-20%), with similar numbers unsure of whether Alberta has a sophisticated business culture (55%-19%), or a diverse economy (55%-18%).
- Far fewer perceive that Alberta offers a low tax environment (25%-38%), which is most likely a reflection of perceptions of Canada generally as a higher tax jurisdiction.
- There is a moderate consensus that the province is advanced in terms of science and technology (49%-17%). Opinion is split on whether Alberta has an attractive climate (47%-49%)

- The strongest negatives (roughly one in five saying this only applies to Alberta a little bit or not at all) about Alberta in terms of this reputation probing were in the following areas:
 - Sophisticated business culture
 - Low taxes
 - Great place to do business

Applies to Alberta

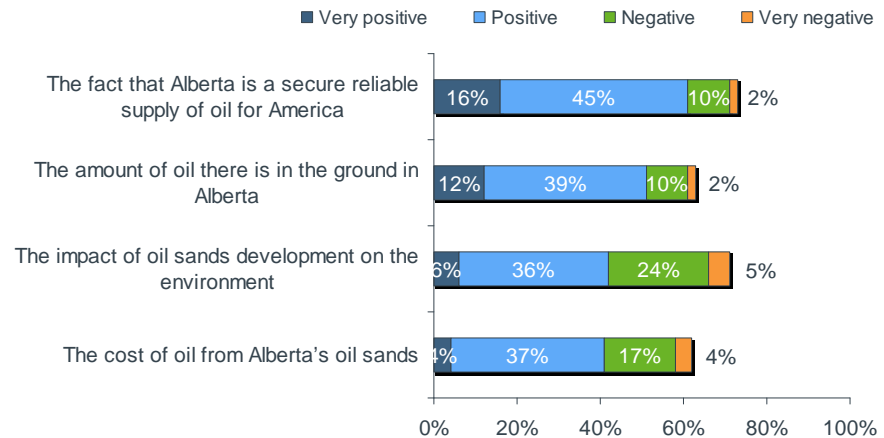
Now I'd like to read you a list of statements that you might feel apply very well or very poorly to Alberta. In each case, please tell me how well you think the statement applies to Alberta, very well, somewhat well, somewhat well, only a little bit or not at all.



- 28% say they are very or somewhat familiar with Alberta's oil sands, 17% say not too familiar, and 52% say not familiar at all. Opinions of the oil sands projects are positive for the fact of there being so much oil in the ground in proximity to the US (51% positive-12% negative) and the fact that "Alberta is a secure, reliable supply of oil for America (61% positive-12% negative).
- Impressions are more tentative or mixed when the question is the impact of oil sands development on the environment (42%-29%) and on the "cost of oil from Alberta's oil sands" (41%-21%).

Impression of Alberta's Oil Sands

Do you have a positive or negative impression of Alberta's oil sands in each of the following areas...?



- A massive majority (90%) say “I'd rather see America buying oil from our friends in Canada than from other places in the world.” At the same time, as was noted in the focus group work, high prices for oil can soften some of this opinion, with 40% agreeing “since oil from Alberta is as overpriced as oil from any other place it’s hard to see why Alberta is a better source than anyplace else”.
- By a margin of 86% to 8% Americans agree “no matter where we get oil, there will be some risk of environmental harm”, and 64% agree that “those developing the oil sands are doing their best to limit the environmental impacts” A similar 68% say “Alberta is taking important steps in showing how resources can be developed in a way that limits the impact on the environment.
- Fully two thirds (67%) of Americans accept some degree of personal responsibility for the fact that the oil sands are being developed, agreeing with the statement “I can’t really get too upset about the oil sands, since I use oil and gas myself”.

Alberta Residents

- Most Albertans report having strong (70%) feelings about the province they live in, while 24% say they have mild feelings and 4% say they have hardly any feelings at all.
- In answer to another question, 29% said that they consider themselves a “proud Albertan first and foremost”, compared to 60% who chose the description “I like Alberta a lot, but think of myself as a Canadian more than an Albertan”, and 8% who selected “Although I live in Alberta, I don’t feel a strong sense of identity with Alberta”. 3% said “I don’t really have a lot of positive feelings about Alberta”.
- When asked to characterize their feelings on a scale of 1 to 100 (100 meaning very positive views), about one in five (18%) Albertans rate Alberta a 100, while only 4% gave a rating below 50.
- When asked how they feel about Alberta as a place to holiday, invest, do business or look for a job or pursue a career, the results show that most Albertans are very positively disposed towards Alberta, especially when it comes to starting a career or starting or expanding a business.

The study tested a total of 24 different attributes to see which ones respondents felt described Alberta better than others. Perhaps the most revealing findings are as follows:

- As was the case among other Canadians, and Americans, above all else, Alberta is seen as a place of “**natural beauty**”. The next strongest associations were “**lots of opportunity**”, and “**lots of possibilities**”
- “**Freedom**” was the next most commonly identified attribute along with “**wide open**”. Two thirds said that they could associate the idea of “**freedom to create**” with Alberta. “**Entrepreneurial**” and a “**spirit of achievement**” were also closely associated with Alberta.
- The majority also felt that “**friendly**” (70%) and “**down to earth**” (59%), were apt descriptions of Alberta. Lesser sized majorities also said that Alberta was:
 - Innovative (63%)
 - Aspiring (58%)
 - Culturally diverse (58%)
 - Evolving (57%)

- Genuine (55%)
 - Generous (54%)
 - Economically diverse (53%)
 - Helpful (51%)
- Weaker associations were found for “**open minded**”, “**responsible**” and “**conscientious**”. The weakest associations were for “**environmentally friendly**” and “**environmentally responsible**”.

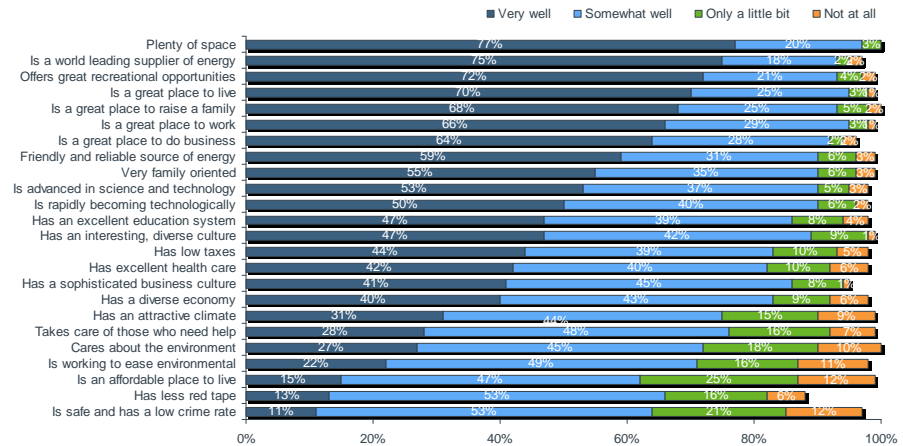
In sum, these patterns suggest that most Albertans see a considerable number of very positive attributes of the province. At the same time, they also evince some degree of concern found among other Canadian audiences about the degree to which the environment is being protected, and some hesitation about the open-mindedness of the province as well.

The study tested a total of 24 different reputation statements to further explore Albertans’ perspectives about the province. The findings reveal:

- The province is very widely seen as having plenty of space, plenty of recreational opportunities and as a world leading supplier of energy.
- There is a broad sense the province is a great place to work and live, but some doubts about whether the province is an *affordable* place to live. The vast majority feel Alberta is a great place to work and raise a family. There is a clear feeling that the province is very family oriented.
- Alberta is also broadly seen as a great place to do business and most also feel it offers low tax advantages, and a sophisticated business culture, but there is less certainty about whether it offers less red tape.
- There is a strong consensus that the province is advanced in terms of science and technology or rapidly becoming so. The large majority feel Alberta has an excellent education system, and almost as many feel that way about its health care system.
- The most evident weaknesses about Alberta in terms of this reputation probing were in the following areas:
 - Affordability
 - Environmental stewardship
 - Climate
 - Takes care of those who need help
 - Safe with a low crime rate

Alberta's Reputation

Tell me if you think the statement applies to Alberta, very well, somewhat well, only a little bit, not at all.



Taken together these results illustrate a province whose residents are largely pleased with the economic opportunities and the way of life in the province. Most are bullish about the future, but with a certain degree of underlying anxiety about what they perceive as an extensive reliance on oil and gas for economic well being.

To the extent that there are concerns about the province, Albertans tend to look at a few areas.

Some appear worried about an affordability gap. There are some concerns as well about whether a focus on money is weakening other human, social and environmental values. And there is a significant degree of anxiety about how well the province can cope both with rapid development and the need to preserve the environment. Discomfort with the crime rate is evident too.

Based on these findings, we recommended developing branding for Alberta in Canada that centres on the idea of Alberta as a place with a defined and positive attitude: a determination to let people have the freedom to create the future they want, and a spirit of achievement to surround them and spur them to success. Such an attitude should be cast in a way that emphasized it is not simply about economic creation, and that the attitude is welcoming and embracing of all types of people and all forms of creativity.

Brand Testing – Qualitative Phase

The next stage of branding related research involved exploring reactions to thematics and graphics. The process was iterative and employed both qualitative and online quantitative methodologies. The key findings were as follows:

- **The research confirmed very strong potential for positive reaction to the idea of Alberta as a place with the Freedom to Create and a Spirit to Achieve.** Albertans felt this expressed very well their attitude towards the future, and the things they consider to be among the very best attributes of the province.
- Several different brand icons were tested. Reactions were clear and helpful. Unequivocally the brand icon which tested most successfully was the one illustrated below.



- People very much liked the cursive style, feeling that it displayed Alberta as open, friendly, confident and positive. There was a sense that this icon connected with the history of Alberta, but more persuasively with a future orientation, and this balance was comfortable for people. It evoked an Alberta that is increasingly dynamic, diverse, young, and contemporary.
- The small number of people who had a less positive reaction typically fell into one of these three categories: 1. people who essentially have bad feelings about Alberta, believing it to be a place that is not hospitable, warm or compassionate, 2. those who feel that the idea of freedom to create and spirit to achieve applied to people with money more than those without, and 3. Albertans who loved Alberta as it had been in the past, and who tended not to like the amount of change that they have seen in the province. However, it was clear that the vast majority of others felt that Alberta needs an aspirational brand that embraces change and openness.

Brand Testing – Quantitative Online Survey

The online study which concluded this research program confirmed the strong appreciation of this brand among Albertans.

- Independently, people react well to the icon, and to the tag line, and associate the approach with important economic and social goals for the province.
- The results show that the branding approach has considerable flexibility to be applied across a range of scenarios and in support of different segments of the province and the provincial economy.
- This approach appears to yield a unifying rather than a polarizing effect. While within the province there can occasionally be some tension about whether the past should be the model for the future, and whether change is a good thing for Alberta, this approach appears to resonate across those lines. The very large majority feel that this approach will deliver benefits for the province in terms of supporting investment, exports, tourism and recruiting.

Conclusions

The research program which is described in this document spanned several stages and a number of months. The results painted a clear picture of the relevance or usefulness of Alberta working to create a clearer and in some cases different set of impressions, in order to help support economic and social goals.

Within Alberta, many people felt that the amount of change the province has undergone makes it advisable to create a rallying identity and vision. There is a sense that the province has very strong positive attributes but some also feel that there is room to improve in terms of openness, compassion and regard for the environment.

In other parts of Canada, these soft negatives are a little more visible. In the US, perceptions are much less developed. Negatives are quite low, but at the same time, perhaps a bigger challenge is that very few people know Alberta as a place of significant economic opportunity.

The brand language and iconography developed for use has tested very well, and has plenty of flexibility to apply to different situations and contexts as well as to appeal to a wide cross section of Albertans. There is a very strong consensus that this branding approach has potential to serve the needs of Alberta when it comes to helping support the export, investment, tourism and recruiting goals of the province.