

Post- Budget 2013 Survey

April 25, 2013

Conducted by Ipsos Reid

Methodology

| Firm | Fieldwork dates | Sample size | Margin of error |
|------------|--------------------|-------------|-----------------------------|
| Ipsos Reid | April 3 – 18, 2013 | 1000 | ± 3.10%, 19 times out of 20 |

- Only one respondent per household was eligible to complete this survey.
- The sample has been weighted by age, gender and region using the latest available Statistics Canada Census data to reflect the actual demographic composition of the population.
- The margin of error will be larger within each sub-grouping of the sample.
- Results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses.
- Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

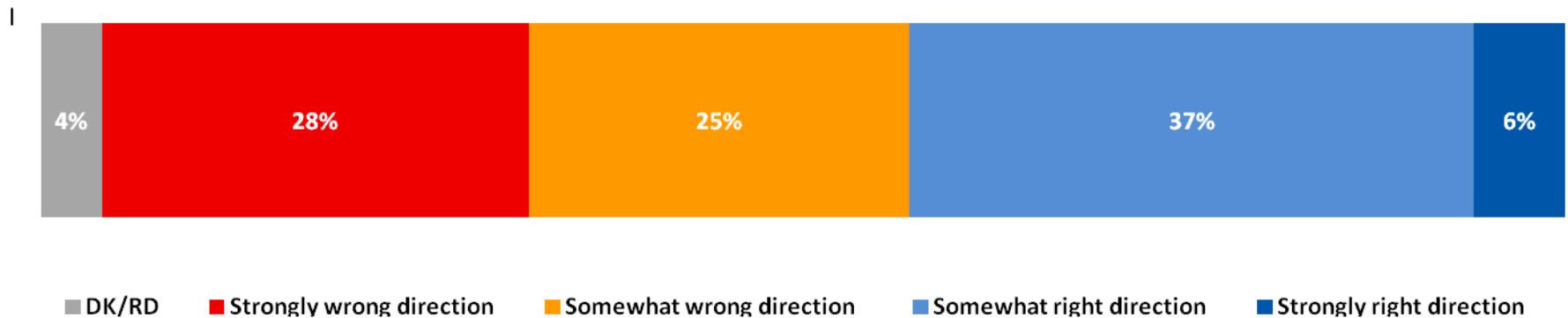
Views of Alberta

Direction of the Province

"In general, would you say that things in Alberta right now are heading more in the right direction or the wrong direction?"

Total wrong direction = 53%

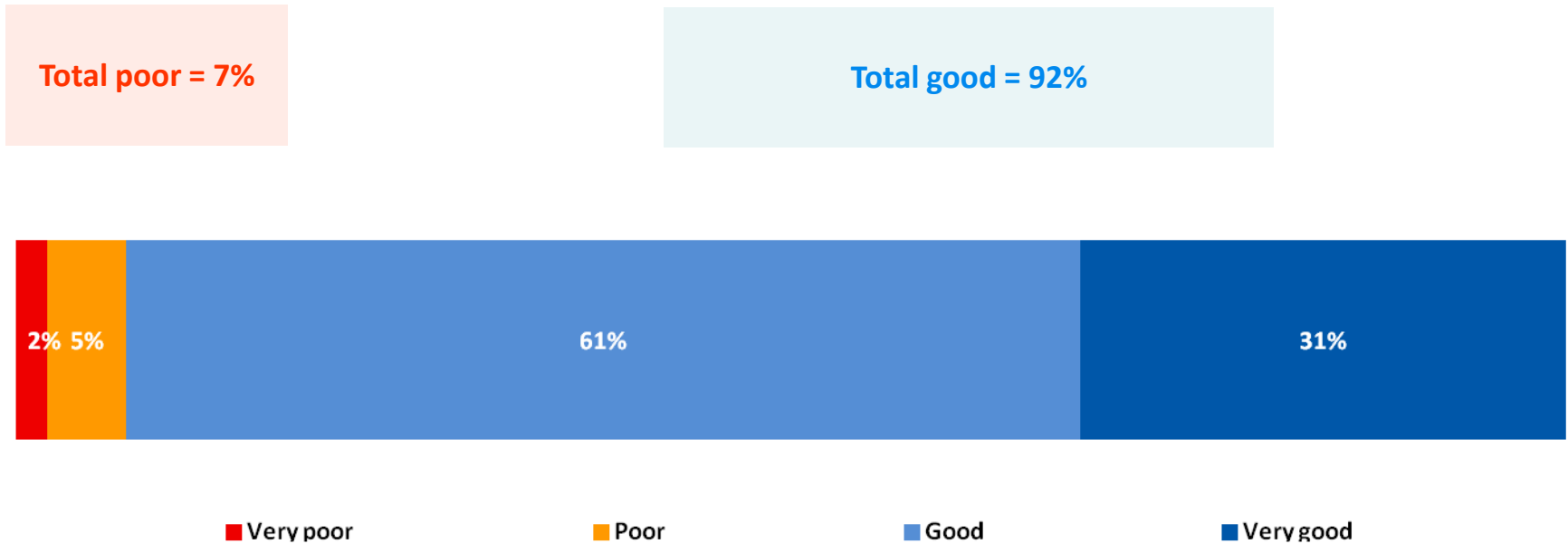
Total right direction = 43%



Source: Post-Budget 2013 Survey, Ipsos Reid, n = 1000

Quality of Life in Alberta

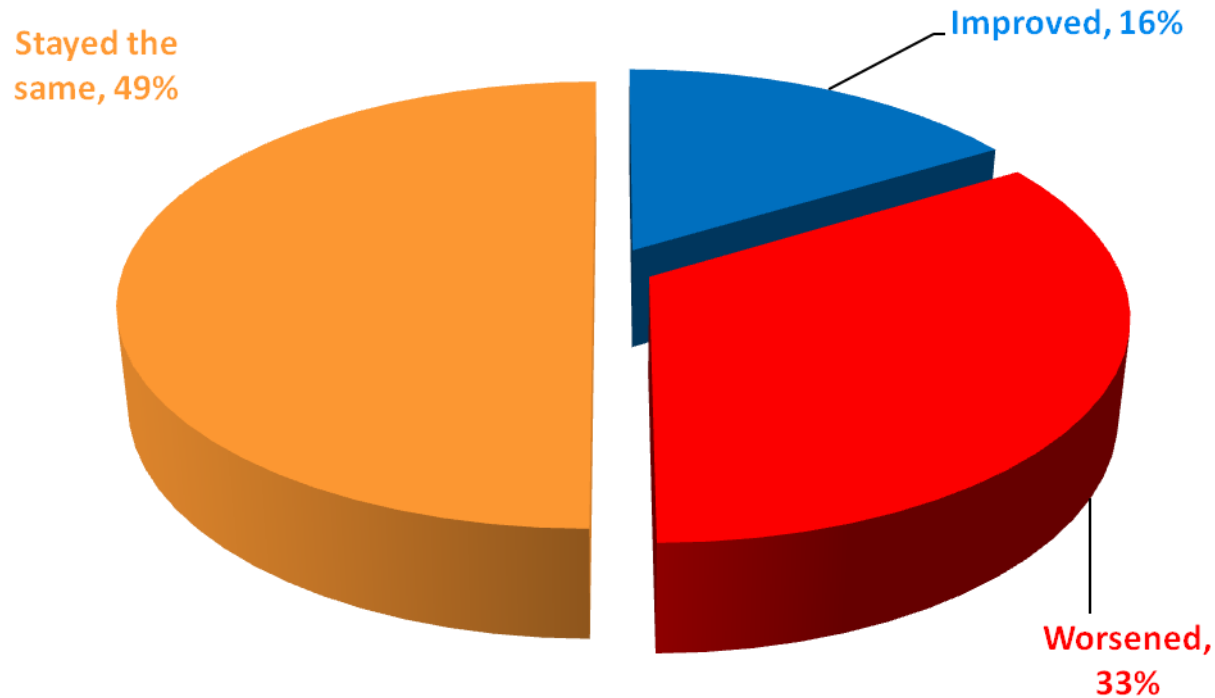
“How would you rate the overall quality of life in Alberta today?”



Source: Post-Budget 2013 Survey, Ipsos Reid, n = 1000

Quality of Life in Alberta – Improving or Worsening?

“And, do you feel that the quality of life in Alberta in the past three years has improved, stayed the same, or worsened?”



Source: Post-Budget 2013 Survey, Ipsos Reid, n = 1000

Government Priorities & Budget

Most important issue facing Alberta?

“In your view, as an Albertan, what is the most important issue facing our province, that is, the one issue you feel should receive the greatest attention from your provincial leaders?”

| | Total times cited as a response | First Response | Second response |
|-----------------------|---------------------------------|----------------|-----------------|
| Health care | 47% | 28% | 20% |
| Economy | 36% | 23% | 17% |
| Education | 35% | 14% | 21% |
| Oil and gas | 14% | 8% | 6% |
| Social programs | 14% | 5% | 9% |
| Environmental issues | 7% | 3% | 4% |
| Justice system | 3% | 2% | 1% |
| Infrastructure | 6% | 2% | 4% |
| Government leadership | 3% | 1% | 2% |
| Other | 13% | 9% | 8% |
| Nothing | 13% | 0% | 13% |
| DK | 6% | 7% | 20% |

Approval of Provincial Government

“Overall, do you approve or disapprove of the job the Alberta provincial government is doing in Alberta today?”

Total disapprove = 49%

Total approve = 49%



■ Strongly disapprove

■ Somewhat disapprove

■ Somewhat approve

■ Strongly approve

Source: Post-Budget 2013 Survey, Ipsos Reid, n = 1000

Confidence in Gov't To Plan for Albertans + Make the right choices

"How confident are you that the government has a long-term plan for Alberta to meet the needs of its citizens today and well into the future?"



"How confident are you that the Alberta Provincial Government will make the right choices to ensure the long-term economic success of the



■ Not at all confident

■ Not very confident

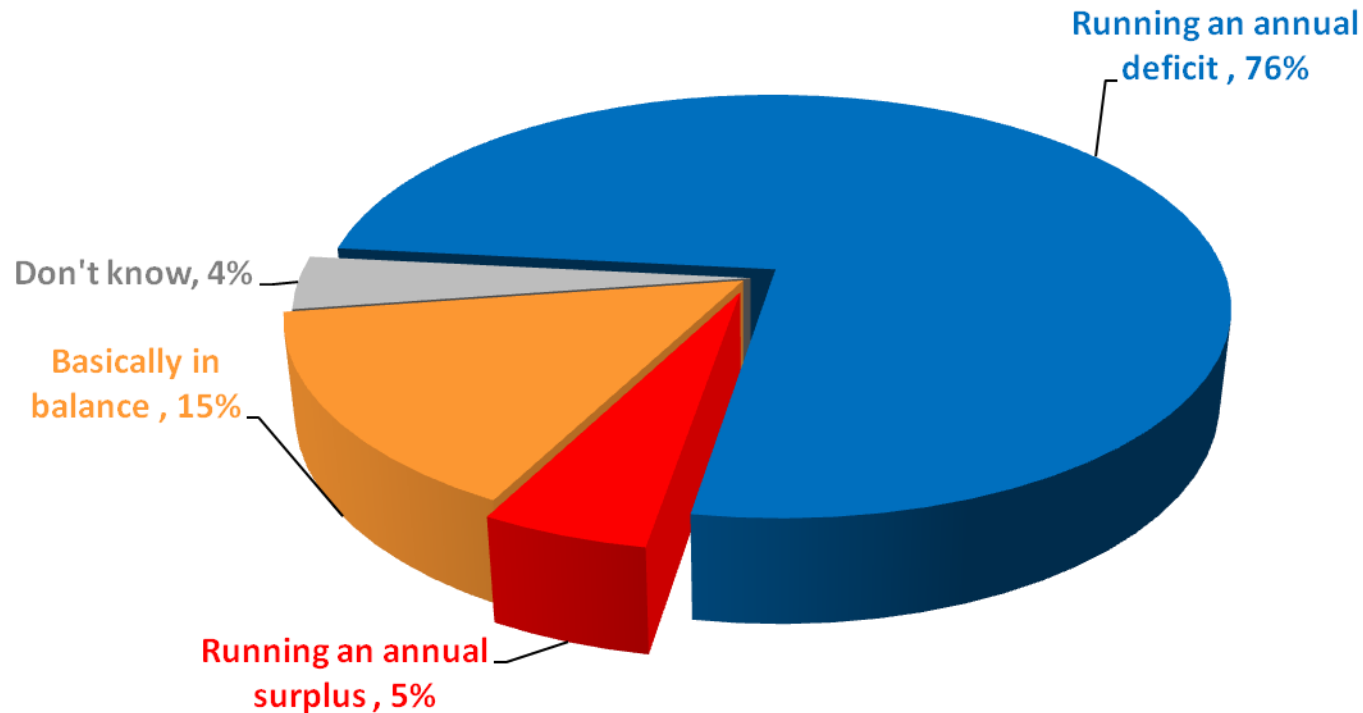
■ Somewhat confident

■ Very confident

Source: Post-Budget 2013 Survey, Ipsos Reid, n = 1000

State of Alberta's finances

*"To the best of your knowledge, what is the current state of the Alberta provincial government's finances:
Running an annual deficit - spending more money than it is receiving **OR** Running an annual surplus - receiving more money than they are spending **OR** Basically in balance - spending and receiving about the same amount"*



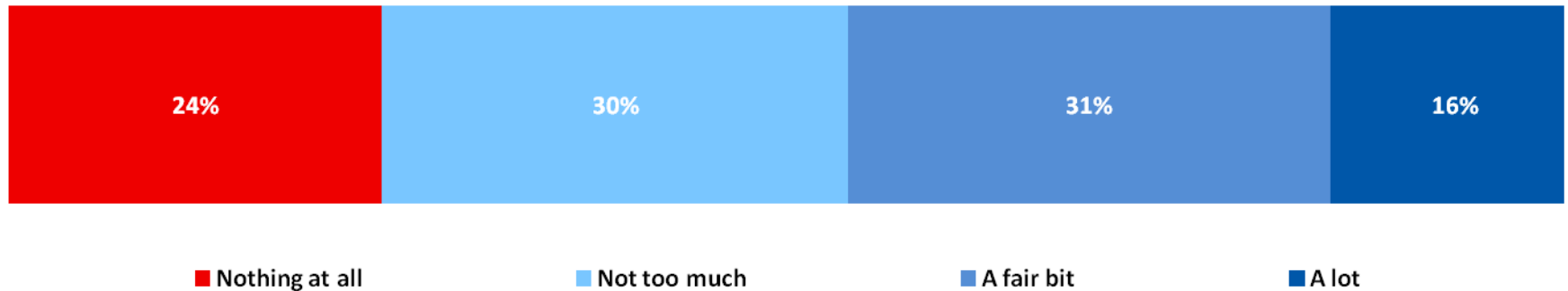
Source: Post-Budget 2013 Survey, Ipsos Reid, n = 1000

Budget Assessment

Awareness of Budget

“As you may know, the Alberta provincial government introduced a new budget on Thursday, March 7th. Have you heard a lot, a fair bit, not too much or nothing at all about the budget?”

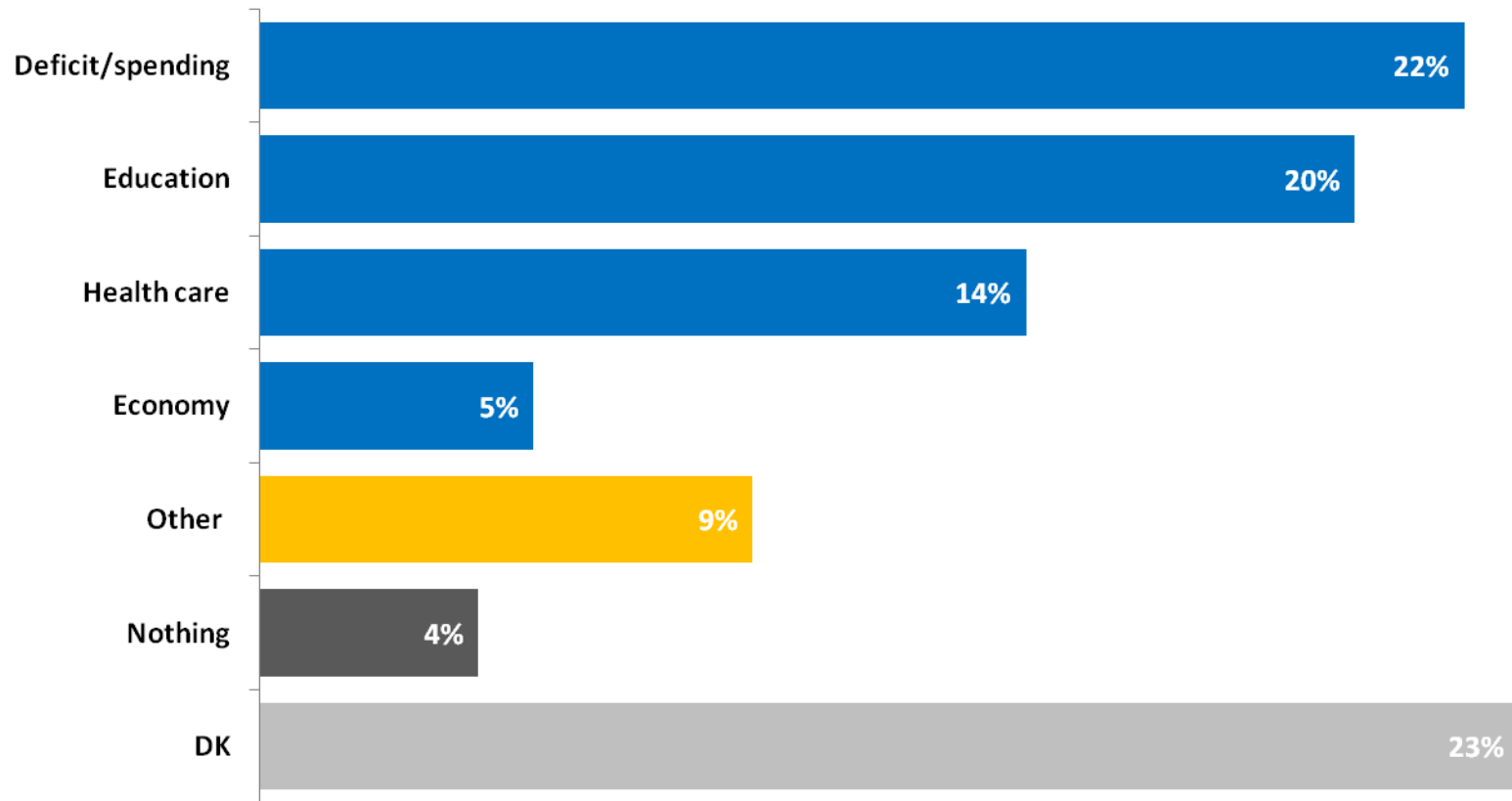
Total expressing some level of awareness = 77%



Source: Post-Budget 2013 Survey, Ipsos Reid, n = 1000

Awareness of Budget

“What part of the budget stands out for you as the most important measure?”

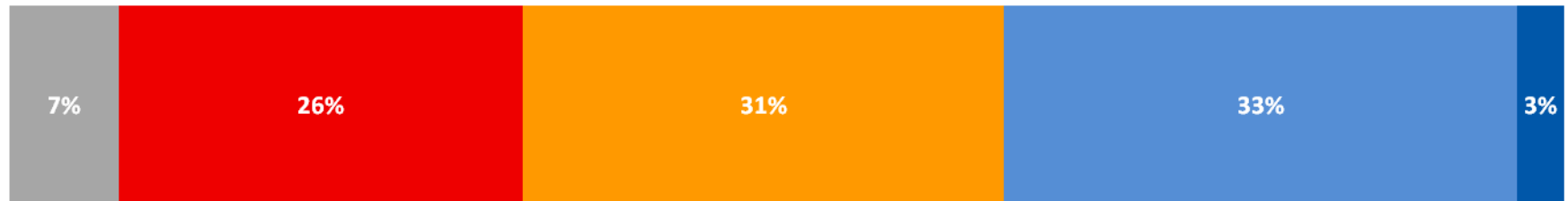


Approval of Budget

“Based on what you have read, seen or heard, do you generally approve or disapprove of the plans in this provincial budget?”
[n = 801 (those who express awareness of budget 2013)]

Total disapprove = 57%

Total approve = 36%



■ DK/RD

■ Disapprove strongly

■ Disapprove somewhat

■ Approve somewhat

■ Approve strongly

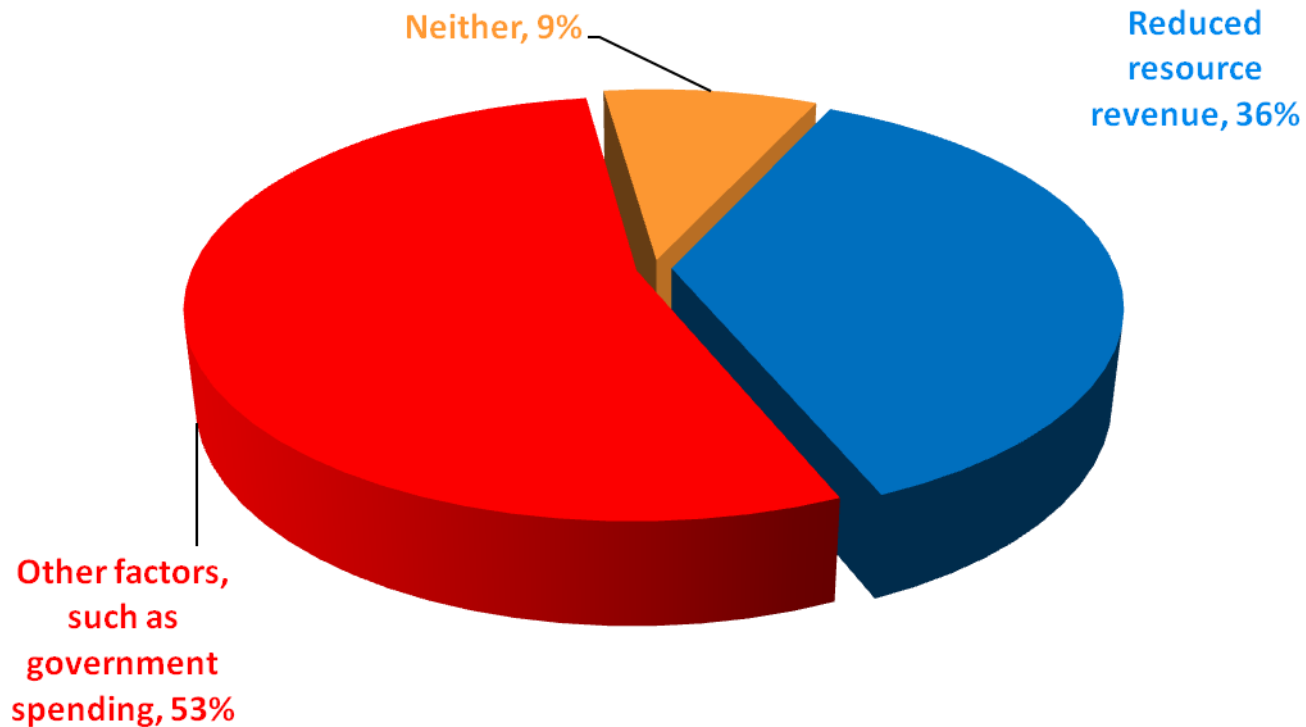
Source: Post-Budget 2013 Survey, Ipsos Reid, n = 801

Cause for Current Budgetary Challenges

“Which of the following statements is closest to your own opinion:

The biggest factor in the Alberta government’s current budgetary challenges is reduced resource revenue due to oil being sold in only one market **OR** That other factors, such as government spending, are the causes of the Alberta government’s current budgetary challenges?”

[n = 801 (those who express awareness of budget 2013)]

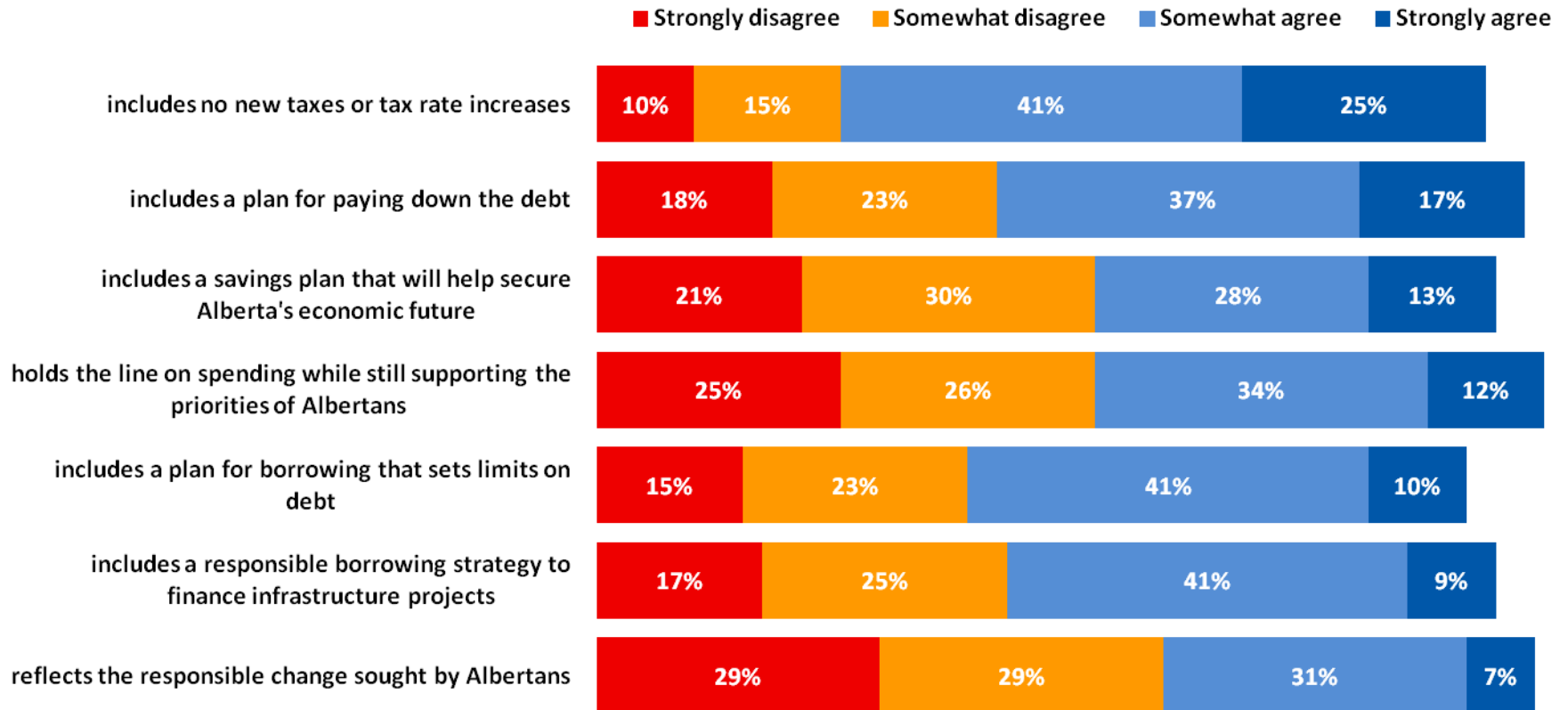


Source: Post-Budget 2013 Survey, Ipsos Reid, n = 801

Agreement with Statements about Budget 2013

"Please tell me whether you agree or disagree with each of the following statements about Alberta's Provincial Budget. Budget 2013..."

[n = 801 (those who express awareness of budget 2013)]

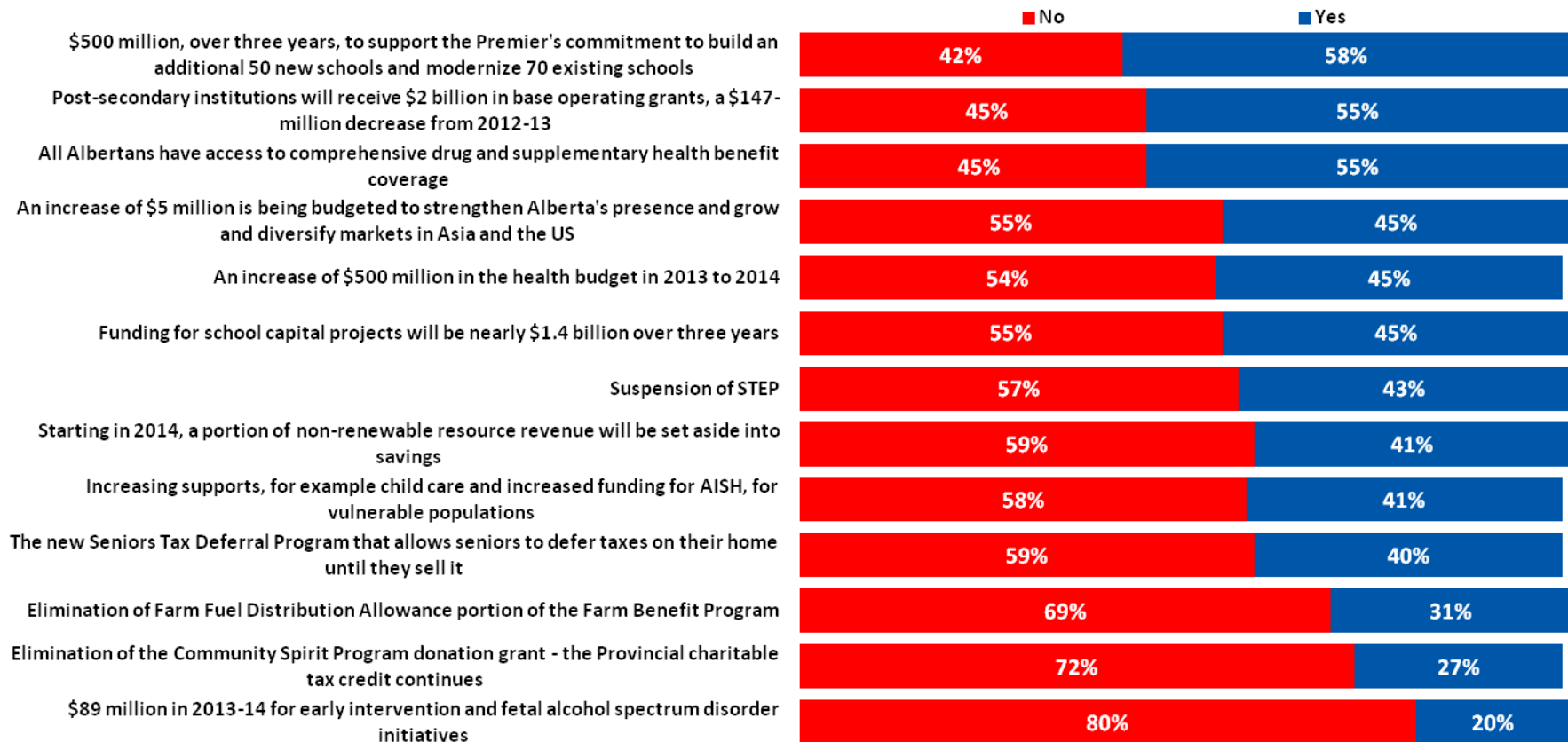


Source: Post-Budget 2013 Survey, Ipsos Reid, n = 801

Awareness of Specific Initiatives

“Prior to now, were you aware of the following items in the provincial budget?”

[n = 801 (those who express awareness of budget 2013)]

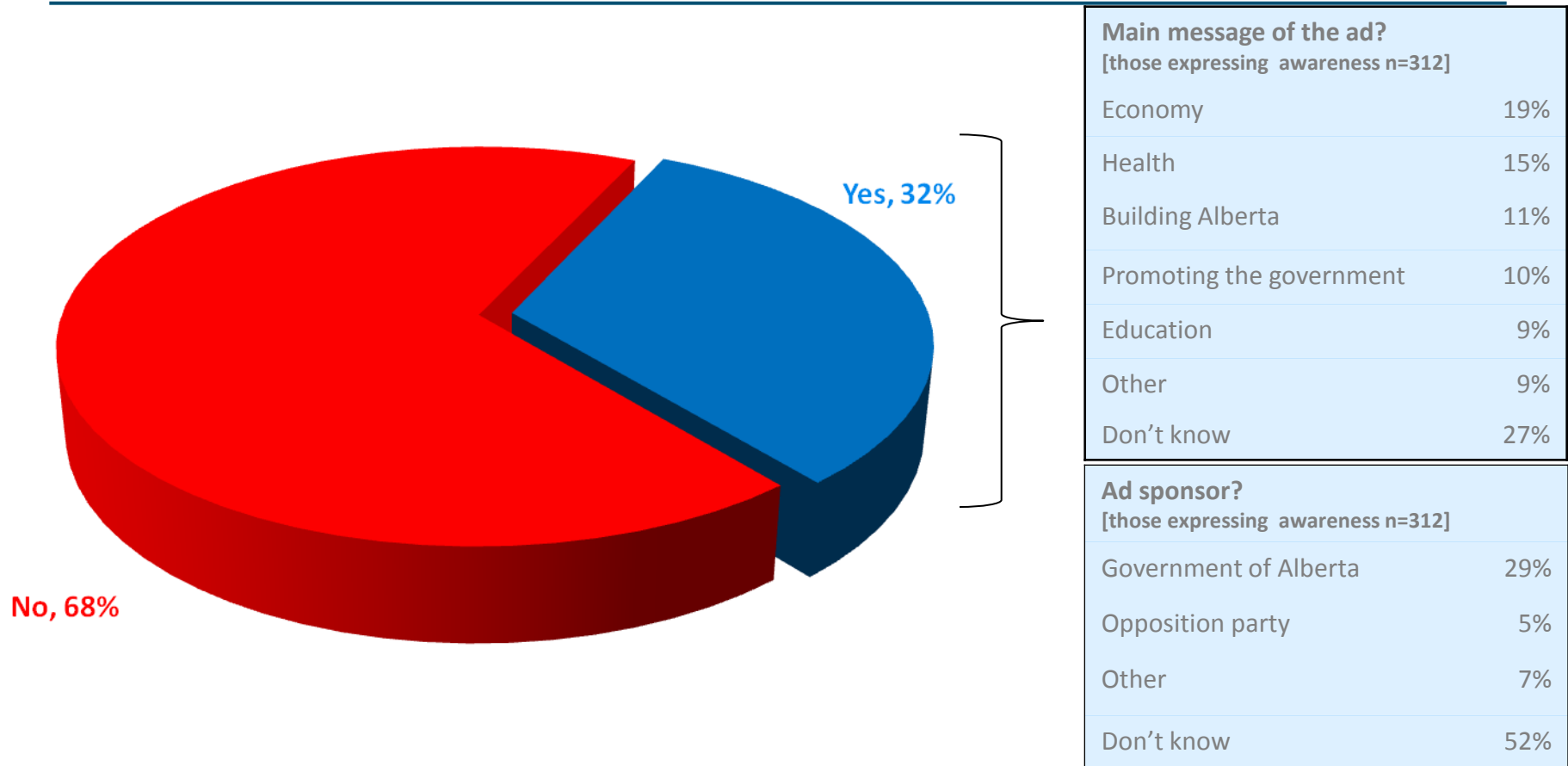


Source: Post-Budget 2013 Survey, Ipsos Reid, n = 801

Budget 2013 Ad Recall

Ad Recall - Unprompted

"In the last month, have you heard any radio advertisements about the 2013 Alberta budget?"

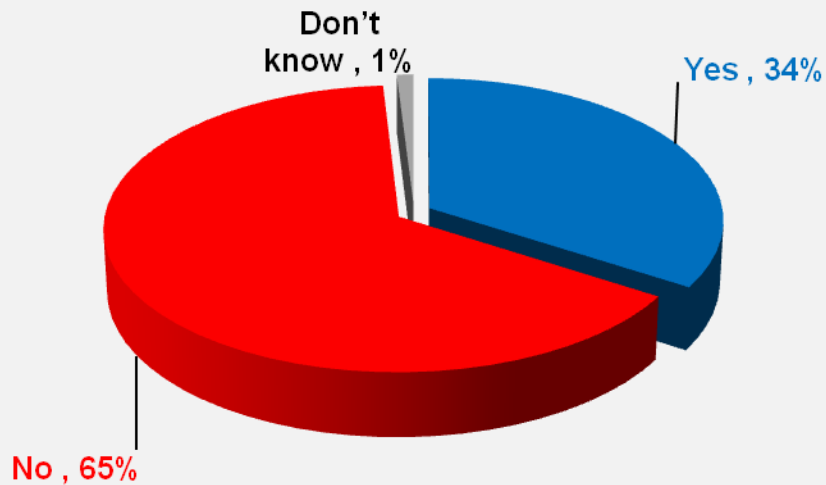


Source: Post-Budget 2013 Survey, Ipsos Reid, n = 1000

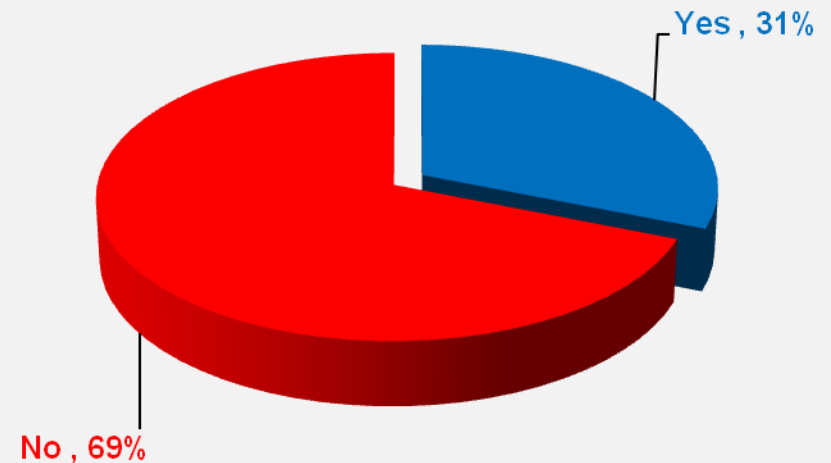
Ad Recall (prompted) – Prior awareness of the ad

“I’m going to play a 30-second radio ad for you – please listen carefully. Do you recall hearing this ad prior to now?”

Those who were played the Building Infrastructure ad [n = 500]



Those who were played the Building Services ad [n = 500]

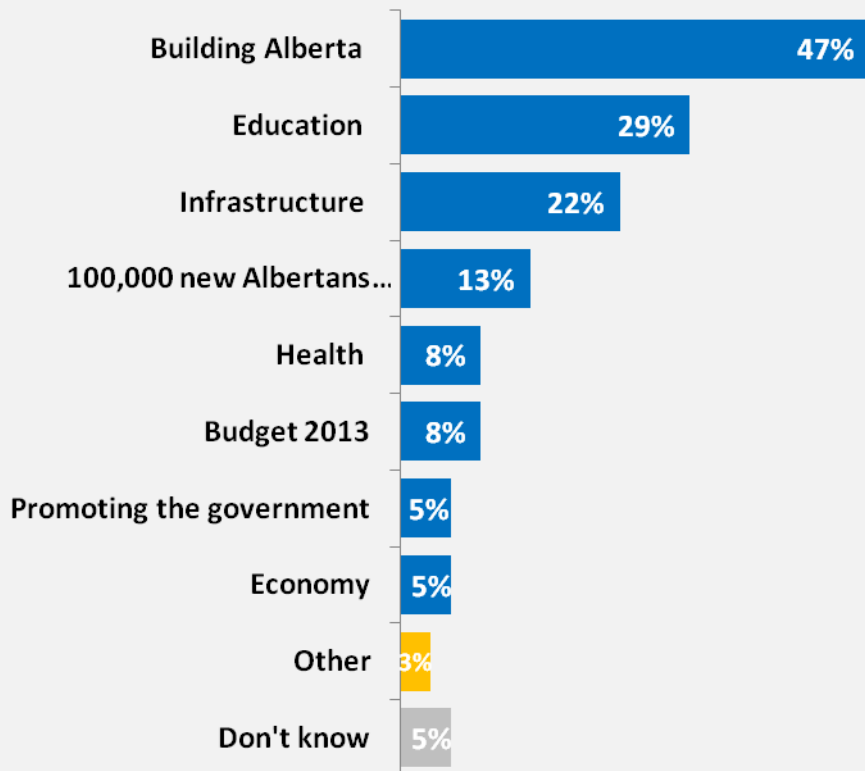


Source: Post-Budget 2013 Survey, Ipsos Reid, n = 1000

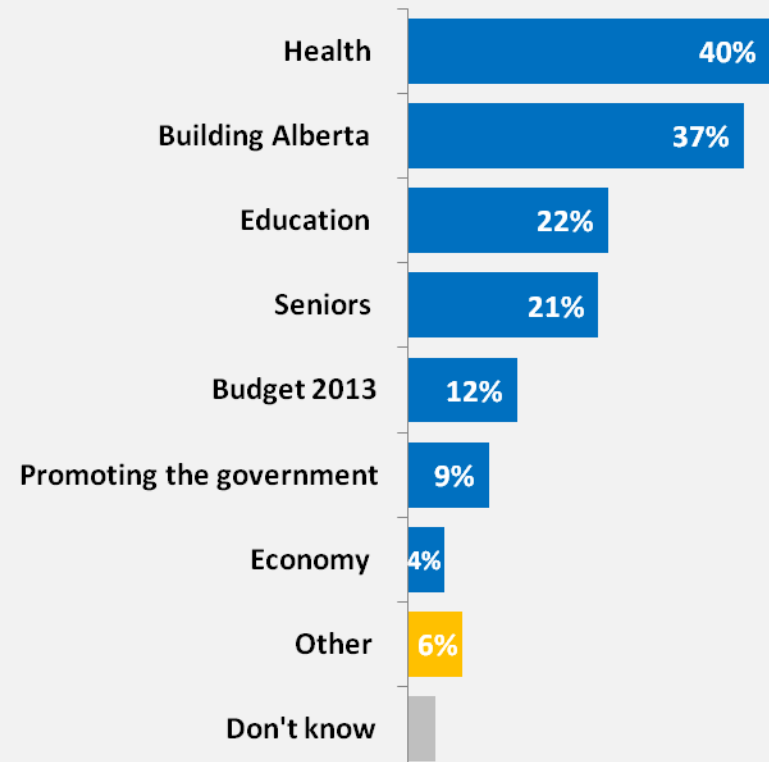
Ad Recall (prompted) – Main Message of the Ad

“What was the main message of the ad you just heard?”

Those who were played the Building Infrastructure ad [n = 500]



Those who were played the Building Services ad [n=500]



Source: Post-Budget 2013 Survey, Ipsos Reid, n = 1000

Ad Recall (prompted)– Sponsorship of the Ad

“Who was the sponsor of the ad you just heard?”

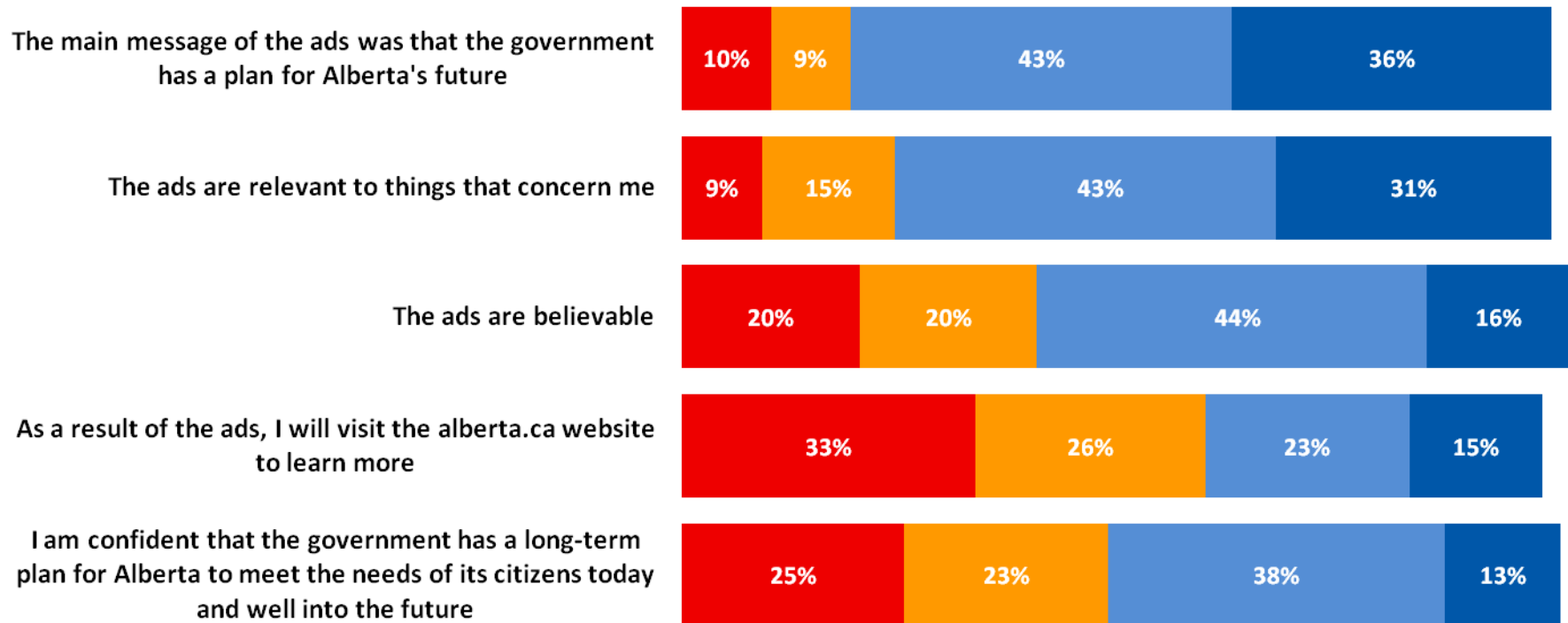
| | Total recognition of sponsorship | Those who were played the <u>Building Infrastructure ad</u> [n = 500] | Those who were played the <u>Building Services ad</u> [n = 500] |
|------------------------------|---|---|---|
| Government of Alberta | 75% | 77% | 73% |
| Alberta.ca | 3% | 3% | 2% |
| Opposition party | 0% | 0% | 1% |
| Other | 4% | 4% | 3% |
| Don't know | 21% | 19% | 24% |

Source: Post-Budget 2013 Survey, Ipsos Reid, n = 1000

Assessing the ads

“Thinking about the radio ads you heard, please tell me whether you agree or disagree with each of the following statements:”

■ Strongly disagree ■ Somewhat disagree ■ Somewhat agree ■ Strongly agree



Source: Post-Budget 2013 Survey, Ipsos Reid, n = 1000