FOCUS ALBERTA

Wave 1 February 2003

February 6, 2003

ENVIRONICS
RESEARCH GROUP

WESTERN CANADIAN DIVISION - CALGARY, ALBERTA

FOCUS ALBERTA

2003 - 1

Research Findings For:

Field Dates:
Jan. 28 – Feb. 4, 2003

Public Affairs Bureau

Research Methodology

SURVEY METHOD

The results of the survey are based on a probability sample of 1000 adults living in Alberta. The survey was conducted by telephone from January 28 – February 4, 2003.

SAMPLE SELECTION

The sampling method was designed to complete 1000 interviews within households randomly selected across the province of Alberta. The sample was drawn in proportion to the populations of 11 urban centers and 3 rural regions within the province based on information from Statistics Canada 2001 Census Data. (See page entitled "Sampling Methodology" for a detailed breakdown of surveys by geographic location)

From within each multi-person household contacted, respondents 18 years of age and older were screened for random selection using the "Most Recent Birthday" method. The use of this technique produces results that are as valid and effective as enumerating all persons within a household and selecting one randomly.

TELEPHONE INTERVIEWING & QUALITY CONTROL

Field supervisors were present at all times to ensure accurate interviewing and recording of responses. A minimum of 10 percent of each interviewer's work was unobtrusively monitored for quality control in accordance with the standards set out by the Canadian Association of Marketing Research Organizations.

A minimum of five calls were made to a household before classifying it as a "no answer."

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STATISTICAL RELIABILITY OF DATA

A sample of 1000 persons within the population produces results which are reliable to within plus or minus 3.1%, 19 times in 20. A simple example which illustrates this point is that if we surveyed 1000 people within the population, and we ended up with 50% of respondents giving a particular response, we can be reasonably confident (95%) that the actual proportion of people in the total population with that opinion will be between 47% and 53% (plus or minus 3%).

It is important to remember that when results are analyzed by geographic region, the margin of error becomes larger due to smaller respondent bases. For instance, there were approximately 250 people surveyed in Calgary, so consequently the margin of error for Calgary data will be larger than for the total respondent base of 1000. The table to the right provides an indication of the relative margin of error expected for various sample sizes.

Sample Size	Margin of Error (95% Confidence Level)
25	19.6%
50	13.9%
100	9.8%
200	6.9%
250	6.2%
300	5.7%
500	4.4%
1000	3.1%
2000	2.2%

STATISTICAL SIGNIFICANCE OF DATA

Whenever results within subgroups of respondents are compared - either to other subgroups of respondents or to the total average - it is important to remember that not all differences are statistically significant.

Some results might be higher or lower than the average score, but depending on the respondent base for that group, the results might only be directional and not statistically significant.

The table to the right indicates the minimum difference required to be statistically significant when comparing results from the six geographic regions that were surveyed.

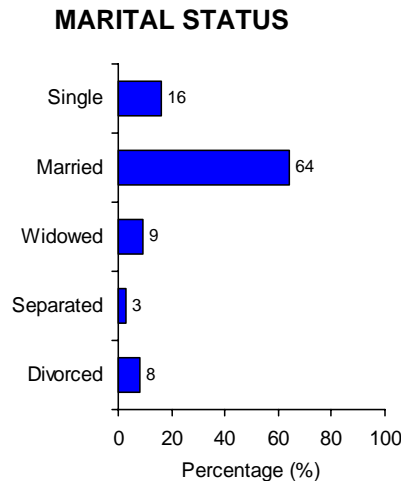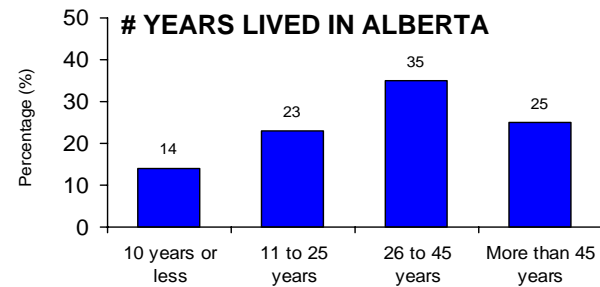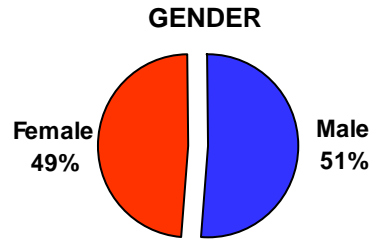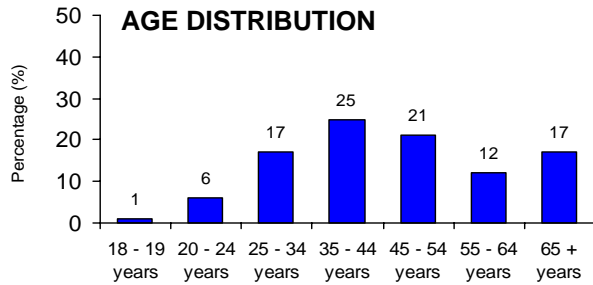|		Rural Central (n=100)	Rural South (n=100)	Rural North (n=100)	Calgary (n=250)	Edmonton (n=250)	Small Cities (n=200)
Rural Central	(n=100)						
Rural South	(n=100)	15%					
Rural North	(n=100)	15%	15%				
Calgary	(n=250)	12%	12%	12%			
Edmonton	(n=250)	12%	12%	12%	9%		
Small Cities	(n=200)	13%	13%	13%	10%	10%	

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Sampling Methodology

RURAL CENTRES	Number of Interviews	Percent of Total Sample	Margin of Error (95%)	URBAN CENTRES *	Number of Interviews	Percent of Total Sample	Margin of Error (95%)
North Region	**100**	**10.0%**	**9.8%**	**Calgary**	**250**	**25.0%**	**6.2%**
Including:				**Edmonton**	**250**	**25.0%**	**6.2%**
St. Paul				**Small Cities**	**200**	**25.0%**	**6.2%**
Westlock				Including:			
Barrhead				Lethbridge			
Morinville				Medicine Hat			
Slave Lake				Red Deer			
Vegreville				Wood Buffalo / Ft. McMurray			
Lac La Biche				Grande Prairie			
Central Region	**100**	**10.0 %**	**9.8%**	Camrose			
Including:				Grand Centre			
Rocky Mountain House				Lloydminster			
Sundre				Wetaskiwin			
Innisfail							
Stettler							
Lacombe				**TOTAL**	**1000**	**100%**	**3.1%**
Drumheller							
Wainwright							
South Region	**100**	**10.0 %**	**9.8%**				
Including:							
Banff							
Brooks							
Claresholm				* Urban centres are sampled based on census metropolitan area (CMA)			
Fort Macleod							
Cardston							
Taber							
High River							

AGE DISTRIBUTION

Age	%
18 - 19 years	1
20 - 24 years	6
25 - 34 years	17
35 - 44 years	25
45 - 54 years	21
55 - 64 years	12
65 + years	17

 # YEARS LIVED IN ALBERTA

Years	%
10 years or less	14
11 to 25 years	23
26 to 45 years	35
More than 45 years	25

GENDER

Female 49%
Male 51%

MARITAL STATUS

Status	Percentage (%)
Single	16
Married	64
Widowed	9
Separated	3
Divorced	8

OCCUPATION

Teacher	6%
Health care worker	7%
Other professional	20%
Administration (CEO's, managers)	17%
Technicians	4%
Office workers (clerical)	6%
Tradesmen	11%
Unskilled workers	19%
Farmers	8%
Sales	-

SECTOR

Public	25%
Private	74%

EDUCATION

Some Elementary (grades 1 - 7)	1%
Completed Elementary (grade 8)	2%
Some High School (grades 9 - 11)	13%
Completed High School (grade 12 or 13)	23%
Some College / Trade School	11%
Completed College / Trade School	19%
Some University	6%
Completed University (Bachelors degree)	18%
Post Graduate (masters, PhD)	7%

HOUSEHOLD INCOME

Under $10,000	3%
$10,000 - $19,999	9%
$20,000 - $29,999	11%
$30,000 - $39,999	12%
$40,000 - $59,999	19%
$60,000 - $79,999	11%
$80,000 - $99,999	9%
$100,000 and over	12%
Refused / Don't know	14%

EMPLOYMENT STATUS

Working full-time	57%
Working part-time	9%
Unemployed or looking for a job	4%
Stay at home full-time	8%
Student	4%
Retired	18%

TENURE

Own	78%
Rent	21%

PART I

Alberta Issues

Important Alberta Issues

- Health Care   33%

- Environment   13%

- Education   10%

- Economy   5%

- Good Government   5%

What is the SINGLE most important issue facing Alberta today?

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Important Alberta Issues

Top of Mind - Single Mention

	Calgary		Edmonton		Small Cities		Rural South		Rural Centre		Rural North	
	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03
Health care	22%	35%	26%	45%	28%	36%	28%	34%	22%	38%	24%	31%
Environment	44%	14%	38%	15%	37%	18%	32%	8%	49%	14%	33%	10%
Education	7%	14%	5%	8%	5%	11%	2%	12%	2%	4%	4%	6%
Economy	7%	5%	7%	5%	6%	3%	9%	5%	3%	8%	6%	8%
Good Gov't	2%	5%	4%	3%	4%	6%	3%	8%	5%	5%	4%	3%

	Male		Female		18 to 24		25 to 44		45 to 64		65+	
	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03
Health care	18%	30%	32%	46%	17%	16%	20%	32%	30%	41%	35%	54%
Environment	44%	14%	34%	12%	45%	23%	41%	17%	38%	11%	32%	4%
Education	3%	9%	7%	12%	4%	13%	8%	12%	2%	9%	1%	5%
Economy	8%	7%	6%	4%	5%	5%	8%	6%	7%	6%	3%	4%
Good Gov't	4%	6%	3%	3%	1%	1%	3%	4%	4%	8%	7%	4%

What is the SINGLE most important issue facing Alberta today?

Important Alberta Issues

- Health Care   60%

- Education   37%

- Environment   32%

- Economy   17%

- Price of Utilities 17%

What other important issues are facing Alberta today?

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Important Alberta Issues

	Calgary		Edmonton		Small Cities		Rural South		Rural Centre		Rural North	
	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03
Health care	50%	59%	50%	67%	57%	60%	54%	51%	51%	59%	45%	57%
Education	26%	40%	21%	35%	22%	34%	22%	44%	21%	28%	13%	29%
Environment	68%	34%	64%	36%	54%	36%	59%	25%	65%	32%	53%	22%
Economy	18%	20%	15%	20%	14%	13%	16%	14%	10%	16%	12%	14%
Price of Utilities	4%	10%	9%	20%	8%	14%	11%	21%	10%	22%	5%	26%

	Male		Female		18 to 24		25 to 44		45 to 64		65+	
	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03
Health care	43%	55%	59%	65%	30%	31%	47%	58%	59%	65%	58%	66%
Education	17%	32%	27%	41%	18%	23%	25%	36%	21%	41%	17%	35%
Environment	61%	33%	58%	31%	61%	37%	63%	40%	65%	30%	54%	14%
Economy	16%	18%	14%	16%	14%	11%	14%	16%	17%	21%	13%	14%
Price of Utilities	8%	22%	7%	13%	4%	13%	6%	15%	9%	18%	12%	23%

What other important issues are facing Alberta today?

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Government Approval Rating
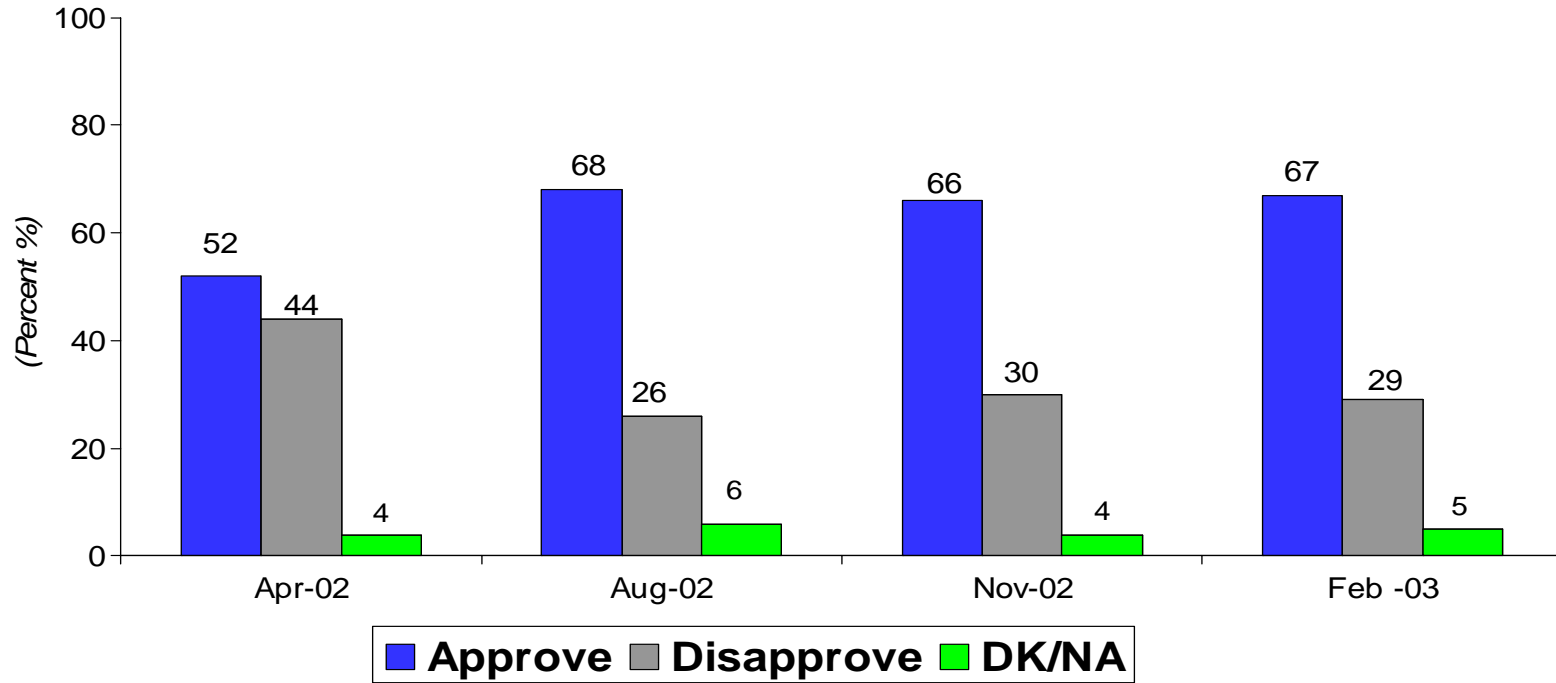
Overall, do you approve or disapprove of the performance of the Provincial Government?

Approval Rating of Government

	Calgary		Edmonton		Small Cities		Rural South		Rural Centre		Rural North	
	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03
Approve	72%	72%	62%	58%	66%	65%	65%	76%	66%	65%	63%	63%
Disapprove	24%	23%	34%	37%	32%	30%	29%	22%	28%	29%	32%	31%

	Male		Female		18 to 24		25 to 44		45 to 64		65+	
	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03	Nov-02	Feb-03
Approve	74%	72%	59%	61%	67%	75%	69%	68%	62%	67%	66%	59%
Disapprove	24%	25%	35%	34%	25%	19%	26%	28%	35%	31%	31%	33%

Overall, do you approve or disapprove of the performance of the Provincial Government?

Percent of Respondents who <u>Approve</u>
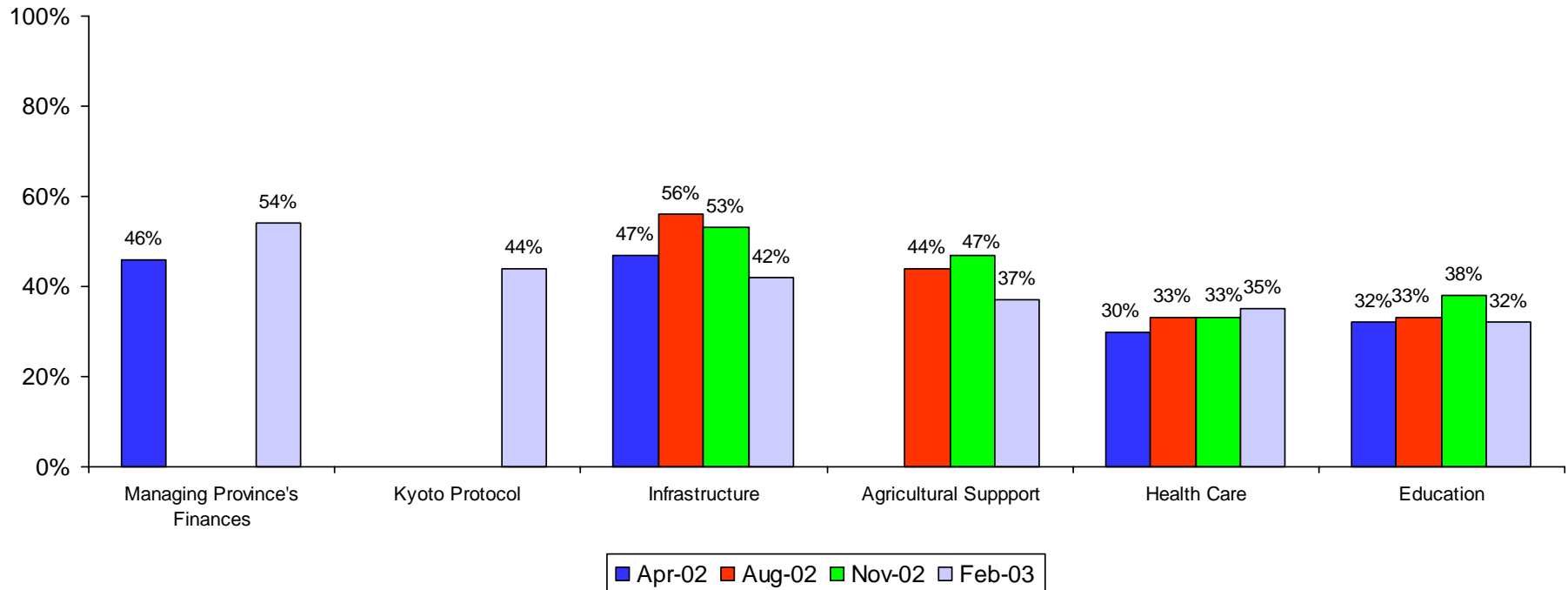
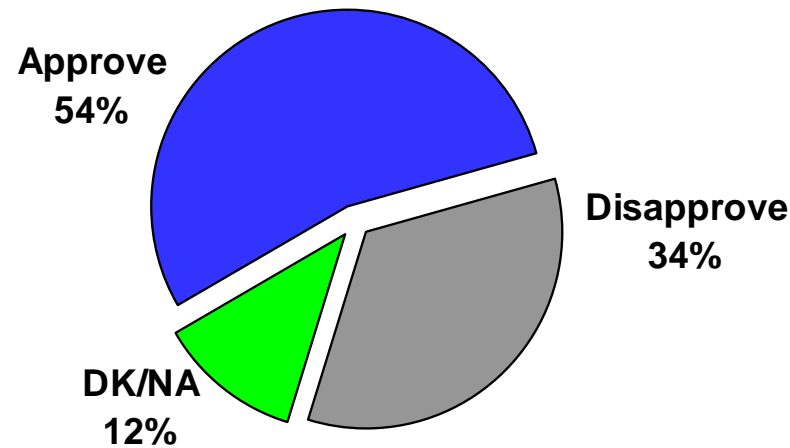*Generally speaking, do you approve or disapprove of the way the Provincial Government is handling the issue of ...?*

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MANAGING FINANCES

Approve 54%

Disapprove 34%

DK/NA 12%

Reasons for APPROVAL	Feb-03 (n=539)
Reducing debt	36%
They are doing a good job	13%
They are fiscally responsible	12%
Balancing the budget/ no deficit	11%
Proper allocation of funds	5%

Reasons for DISAPPROVAL	Feb-03 (n=338)
Spend money in wrong areas/ waste/ spending	24%
Inadequate funding to education/ teachers	24%
Inadequate funding to health care	23%
Should not pay the debt now/ no emphasis	11%
Lack of funding for infrastructure	6%
Not doing enough for people	5%

Note: - Mentions below 5% are not listed.

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KYOTO PROTOCOL

Disapprove
31%

Approve
43%

DK/NA
26%
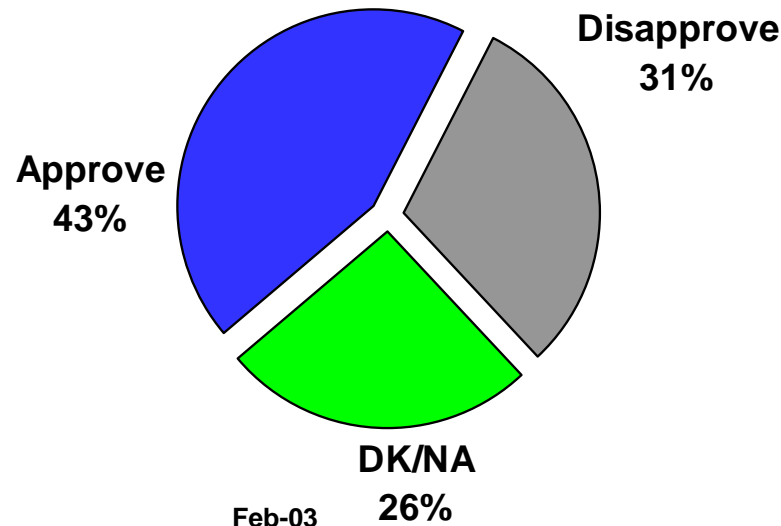
Reasons for APPROVAL	Feb-03 (n=432)
They are fighting for Alberta's interests	16%
Standing up against/ challenging the feds	15%
Concerned about the economy/ jobs	13%
It's time to do something about pollution	10%
There are other alternatives/ Made in Canada	9%
Against Kyoto	9%
Asking questions/ looking for more information	7%
They are doing their best/ good job	7%
Need more time/ more caution	6%
They are voicing their opinions/ concerns	6%

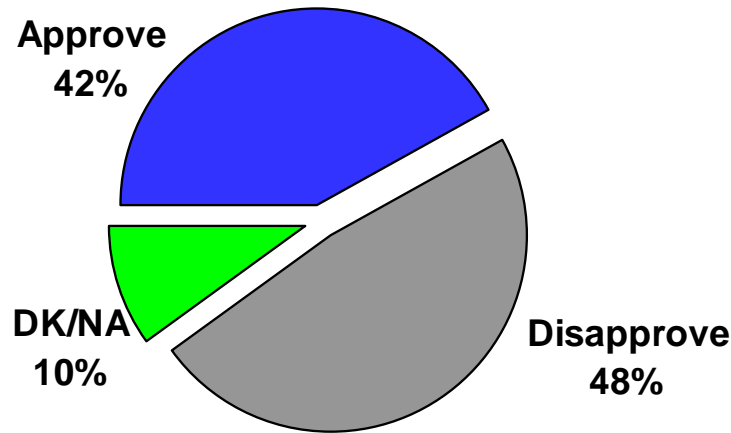| Reasons for DISAPPROVAL	Feb-03 (n=310)
Need to be concerned about the environment	14%
Affects the economy/ job loss	12%
Not keeping us informed/ confusing	11%
Should take a stronger stand	8%
It will benefit future generations	6%
Not consulting public opinion	5%

Note: - Mentions below 5% are not listed.

16

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INFRASTRUCTURE

Approve
42%

DK/NA
10%

Disapprove
48%

Note: - Mentions below 5% are not listed.

Reasons for APPROVAL	Feb-03 (n=416)
Roads/ highways are well maintained	22%
No problems/ happy with it	16%
Hospitals are well maintained/ good services	10%
Accommodating the growth/ lots of development	9%
Have good schools	9%
Better than other provinces/ countries/ than before	6%
Governments is being fiscally responsible	6%
They did their best with the money provided	6%
Increased funding to infrastructure	5%

Reasons for DISAPPROVAL	Feb-03 (n=486)
Lack of funding	28%
Schools are not properly maintained	17%
Closing down hospitals/ shortage of beds	15%
Roads/ highways are in poor condition	14%
Too much is being privatized	9%
Not expanding fast enough	6%
Poor planning of future developments	6%
They are not doing anything	5%
Money was spent in wrong area	5%

AGRICULTURAL SUPPORT

Approve
37%

Disapprove
26%

DK/NA
37%

Reasons for APPROVAL	Feb-03 (n=365)
Try to help/ have a plan to help farmers	31%
They are doing a good job/ farmers not complaining	9%
Funds to support the farmers	9%
Drought Assistance program	7%
It's weather, government can't do anything	6%

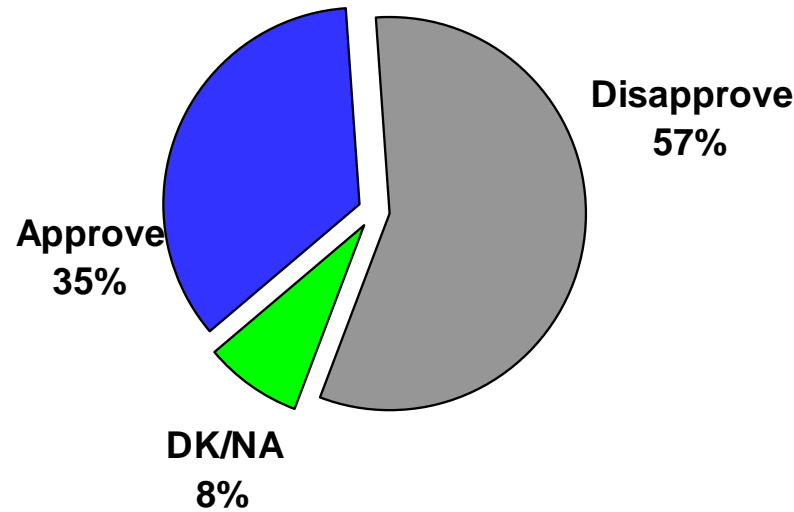| Reasons for DISAPPROVAL	Feb-03 (n=256)
Support is not enough	23%
More drought assistance programs	7%
Wheat board has too much power/ restrictions	3%
Can't sell wheat to the States	5%
Too many rules in agriculture	5%

Note: - Mentions below 5% are not listed.

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Approval Ratings on Various Government Issues

HEALTH CARE

Disapprove
57%

Approve
35%

DK/NA
8%

Reasons for APPROVAL	Feb-03 (n=345)
No problems everything fine	11%
Believe privatization is good	10%
Personal experience	7%
Good health care services	6%
Health Care is accessible	6%
Limited amount of money to spend	5%

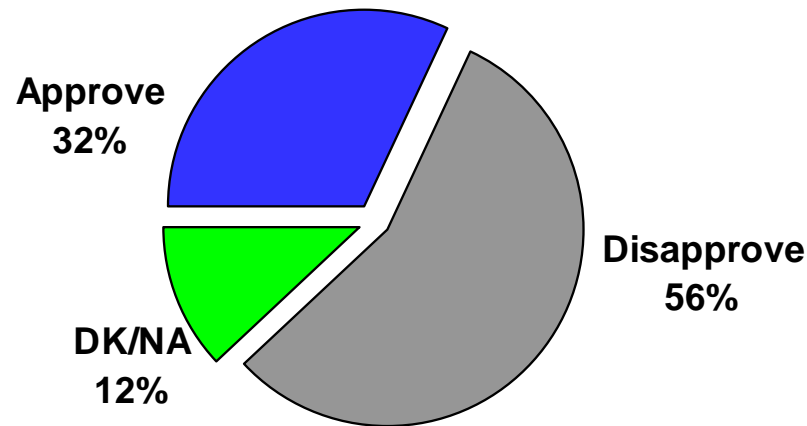| Reasons for DISAPPROVAL	Feb-03 (n=576)
Don't believe in privatization/ two tier system	22%
Long waiting time	19%
Lack of funding/ resources/ support	17%
Too many cutbacks	13%
Not enough doctors/ nurses/ h.c. workers	12%
Shortage of hospitals/ beds	11%

Note: - Mentions below 5% are not listed.

EDUCATION

Pie chart:
- Approve 32%
- Disapprove 56%
- DK/NA 12%

Reasons for APPROVAL	Feb-03 (n=322)
Providing quality/ good education/ graduates	12%
Doing a good job/ no problems	12%
System is more efficient/ cutting out the waste	10%
Increased funding	8%
Teachers are receiving a wage increase	5%
Doing a good job with limited funds	5%

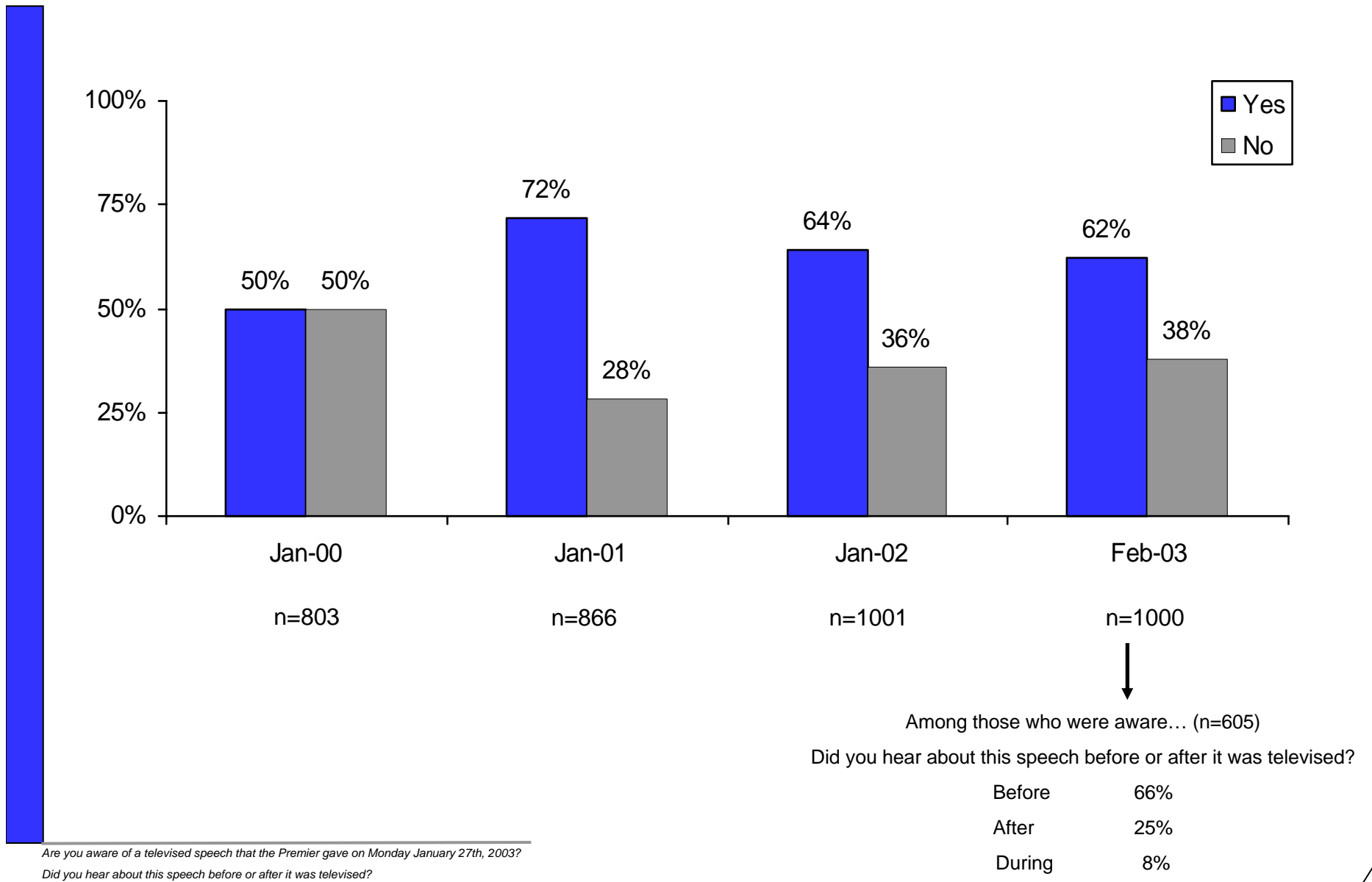| Reasons for DISAPPROVAL	Feb-03 (n=553)
Not enough funding/ too many cutbacks	35%
High tuition/ cost of education/ less accessible	22%
Crowded classrooms/ high teacher student ration	15%
Closing down schools/ need more	12%
Education is not given enough priority	8%
Need more teachers/ aids	7%
Teachers are not paid enough	5%

Note: - Mentions below 5% are not listed.

PART II

Premier's Speech

	Jan-00	Jan-01	Jan-02	Feb-03
Yes	50%	72%	64%	62%
No	50%	28%	36%	38%
	n=803	n=866	n=1001	n=1000

Among those who were aware… (n=605)

Did you hear about this speech before or after it was televised?

Before	66%
After	25%
During	8%

Are you aware of a televised speech that the Premier gave on Monday January 27th, 2003?

Did you hear about this speech before or after it was televised?

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22

Awareness of Premier's Speech

	Calgary		Edmonton		Small Cities		Rural South		Rural Centre		Rural North	
	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03
Aware	65%	63%	69%	65%	59%	49%	64%	62%	62%	61%	56%	63%
Unaware	35%	37%	60%	35%	41%	51%	36%	38%	38%	39%	44%	37%

	Male		Female		18 to 24		25 to 44		45 to 64		65+	
	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03
Aware	66%	62%	61%	61%	42%	26%	57%	57%	73%	72%	75%	68%
Unaware	34%	38%	39%	39%	58%	74%	43%	43%	26%	28%	36%	32%

Are you aware of a televised speech that the Premier gave on Monday January 27th, 2003?

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How Did You Hear About the Speech?

Top of Mind - Single Mention

	Total (n=605)	Before (n=401)	After (n=149)	During (n=49)
Television News Report	37%	37%	35%	47%
Radio News Report	20%	21%	21%	3%
Television Ad	11%	14%	3%	4%
Radio Ad	9%	10%	8%	3%
Newspaper News Report	7%	5%	12%	1%
Family/Friends /Co-workers	7%	5%	15%	3%
As it aired/ flipped to it	4%	-	3%	36%
TV Guide Ad	1%	1%	*	-

Note: "-" indicates zero mentions

* indicates mentions less than 1%.

*Where did you **first** hear about this speech?*

How Did You Hear About the Speech?

Share of Mind - Multiple Mentions

	Total (n=605)	Before (n=401)	After (n=149)	During (n=49)
Television News Report	46%	47%	40%	52%
Radio News Report	27%	28%	29%	11%
Newspaper News Report	24%	23%	29%	13%
Television Ad	14%	19%	5%	5%
Family/Friends /Co-workers	14%	12%	21%	7%
Radio Ad	13%	16%	10%	3%
As it aired/ flipped to it	4%	*	3%	36%
TV Guide Ad	1%	1%	*	-

Note: "-" indicates zero mentions

* indicates mentions less than 1%.

*Where **else** did you hear about this speech?*

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Of those AWARE of the Speech

Did you watch ...

Legend:
- All (blue)
- Part (green)
- None (gray)

Chart data:

	Jan-00	Jan-01	Jan-02	Feb-03
All	14%	19%	15%	15%
Part	30%	26%	27%	21%
None	56%	56%	59%	63%
	n=400	n=626	n=636	n=605

Did you watch all, part or none of this speech?

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26

How Much of the Speech Did You Watch?

Of those AWARE of the Speech

Did you watch ...

	Calgary		Edmonton		Small Cities		Rural South		Rural Centre		Rural North	
	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03
All	17%	20%	10%	11%	13%	12%	30%	15%	13%	16%	7%	18%
Part	29%	18%	26%	23%	24%	24%	20%	18%	32%	16%	29%	32%
None	54%	62%	64%	66%	62%	64%	50%	68%	55%	67%	64%	51%

	Male		Female		18 to 24		25 to 44		45 to 64		65+	
	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03	Jan-02	Feb-03
All	11%	14%	18%	17%	3%	-	5%	4%	18%	16%	32%	38%
Part	27%	21%	26%	22%	30%	29%	26%	20%	26%	22%	29%	21%
None	62%	62%	55%	62%	68%	72%	69%	75%	56%	63%	39%	41%

Did you watch all, part or none of this speech?

Of those AWARE of the Speech

Legend:
- Jan-00
- Jan-01
- Jan-02
- Feb-03

The Premier talked about things that I am concerned with: 72%, 70%, 68%, 52%

The information in the speech was useful: 52%, 49%, 42%, 30%

It made me more confident about the way health care is being handled: 32%, 38%, 28%, 21%
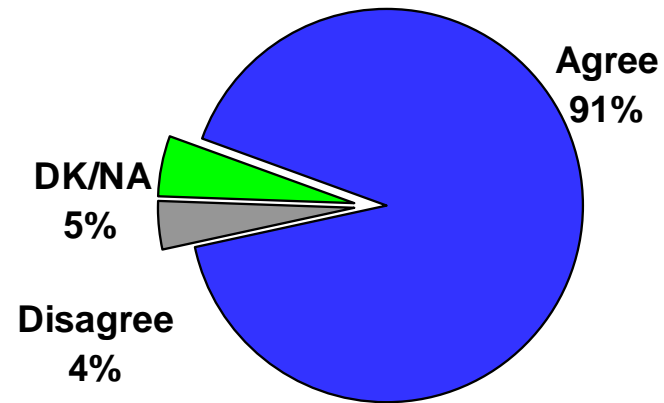
I learned something new from the speech: 34%, 32%, 26%, 17%
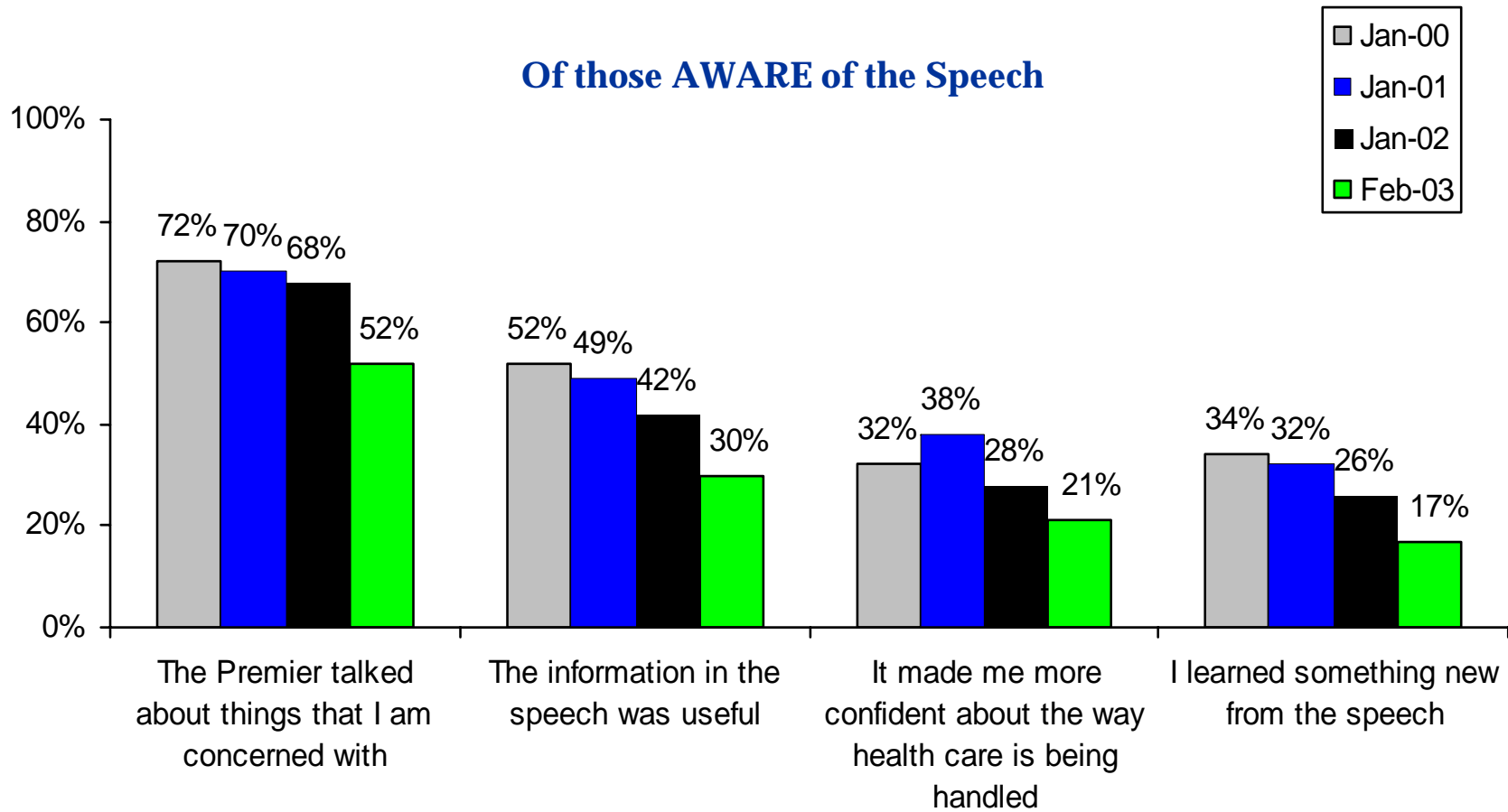
Based on what you have seen or heard about the speech, please tell me whether you agree or disagree with each of the following statements about the speech?

Appropriate Speech Topics?

Appropriate Speech Topics?

Agree 91%

DK/NA 5%

Disagree 4%

As you may know, the Premier focused on five main areas in his speech – health care; infrastructure, that is roads and public facilities like schools and hospitals; agriculture; the Kyoto Protocol; and fiscal responsibility. In your view, would you agree or disagree that these were appropriate topics for the Premier to be addressing at this time?

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Appropriate Speech Topics?

	Calgary	Edmonton	Small Cities	Rural South	Rural Centre	Rural North
	Feb-03	Feb-03	Feb-03	Feb-03	Feb-03	Feb-03
Agree	95%	88%	91%	91%	88%	93%
Disagree	3%	5%	2%	3%	3%	2%

	Male	Female	18 to 24	25 to 44	45 to 64	65+
	Feb-03	Feb-03	Feb-03	Feb-03	Feb-03	Feb-03
Agree	91%	92%	95%	92%	92%	87%
Disagree	4%	3%	4%	3%	4%	5%

As you may know, the Premier focused on five main areas in his speech – health care; infrastructure, that is roads and public facilities like schools and hospitals; agriculture; the Kyoto Protocol; and fiscal responsibility. In your view, would you agree or disagree that these were appropriate topics for the Premier to be addressing at this time?

30

Other Speech Topics to Address?

Other Speech Topics?

DK/NA
4%

Yes
25%

No
71%
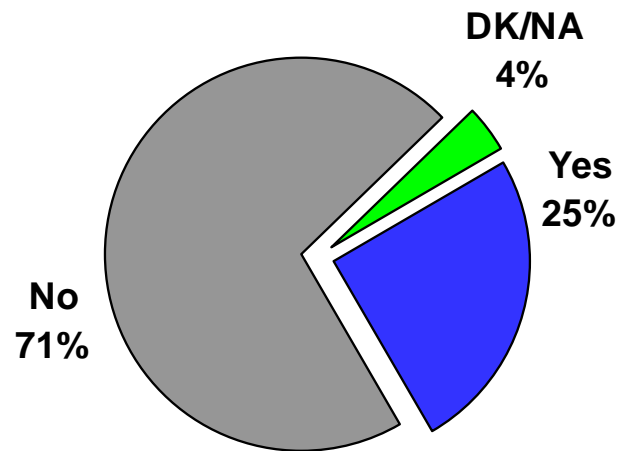
Other Topics Premier Should Have Addressed

	(n=252)
• Education/ cost of education	**24%**
• Justice/ Crime	**10%**
• Gun control/ registration	**9%**
• Costs of energy/ utilities	**7%**
• Homelessness	**7%**
• Social programs	**6%**
• The possibility of war	**5%**

Note: - Mentions below 5% are not listed.

Are there any other topics that you think the Premier should have addressed? IF YES… What other topics should the Premier have addressed?
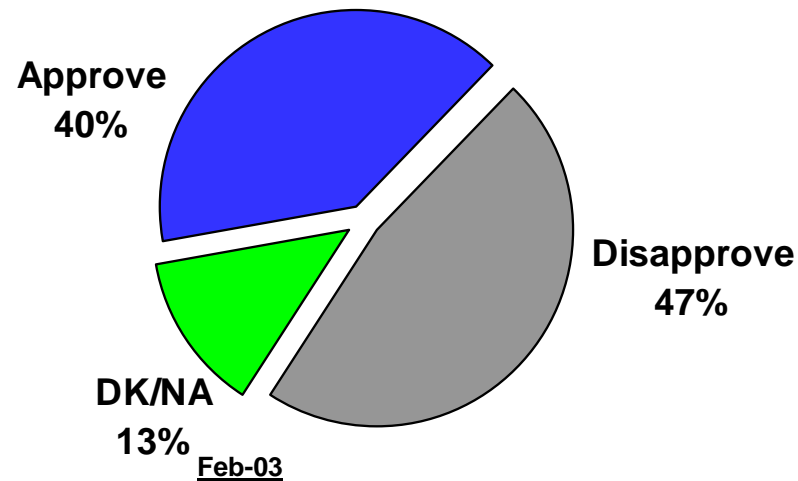
Environics West
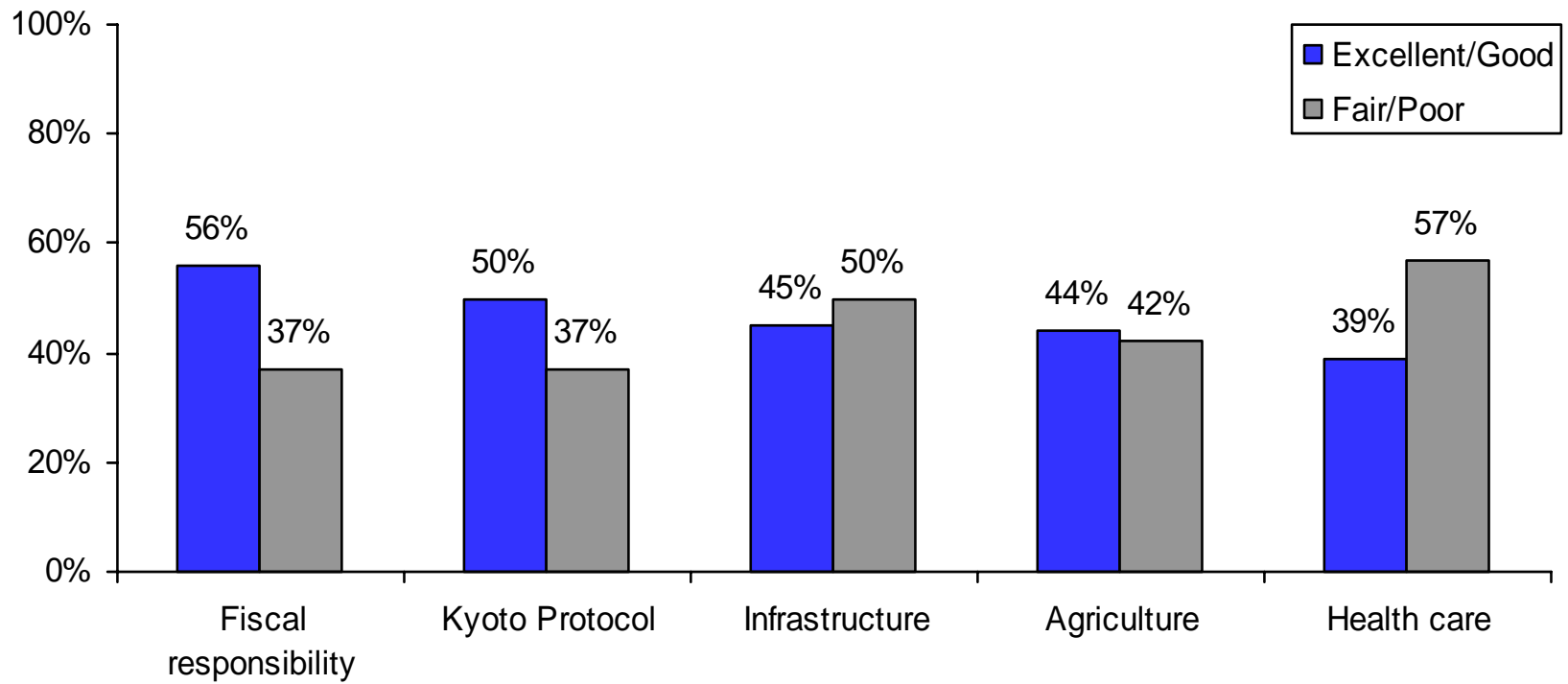
Please tell me whether you believe the Alberta Government has an excellent, good, fair, or poor understanding of the problems that need to be solved in that area.

Speech Topic – Public and Private Partnership Approval

Approval of Partnerships

Approve
40%

Disapprove
47%

DK/NA
13%

Reasons for APPROVAL	Feb-03 (n=397)
Another avenue for funding	15%
May result in cost savings	11%
Reduces waste/ efficient	7%
Takes burden off the government/ schools	5%
Maximize resources/ better allocation	5%

Note: - Mentions below 5% are not listed.

Reasons for DISAPPROVAL	Feb-03 (n=465)
It is going to cost more/ still have to pay for it	28%
It should be the government's responsibility	19%
Private companies are profit oriented	12%
Services/ standards will deteriorate	9%
Result in two tiered system	9%
Not successful elsewhere	7%
Government losing control	6%
Leads to privatization	5%

In his speech, the Premier also discussed how the Alberta Government will be exploring public and private sector partnerships to help build new schools, hospitals and other infrastructure. Do you approve or disapprove of the government's position on the public/private partnerships?
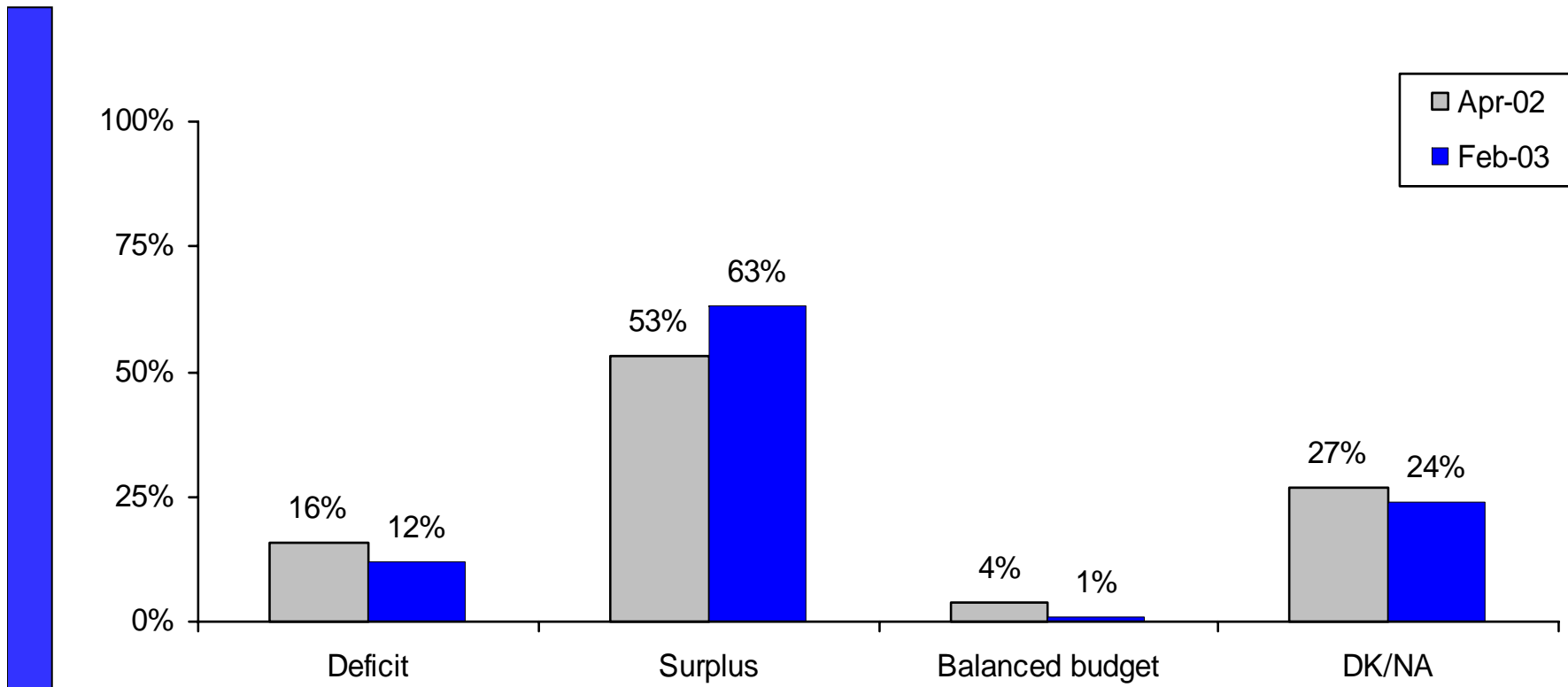
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PART III

Finances

Budget Awareness

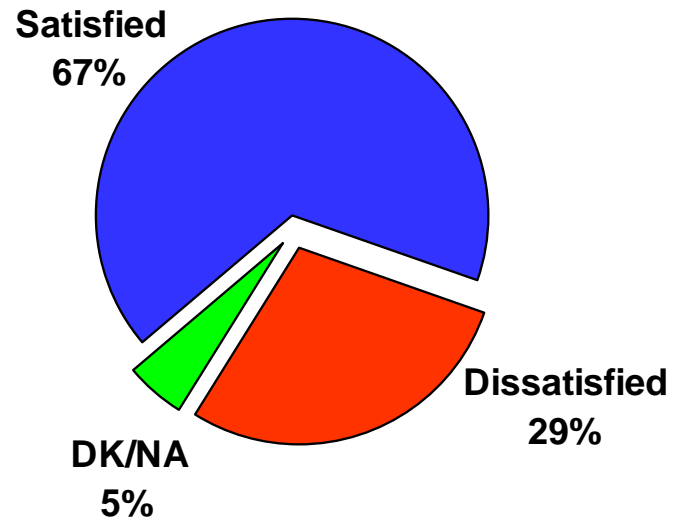|	Apr-02	Feb-03
Deficit	16%	12%
Surplus	53%	63%
Balanced budget	4%	1%
DK/NA	27%	24%

To the best of your knowledge, is Alberta's budget for this year operating at a deficit, that is spending more than it gathers in revenue, or at a surplus, that is spending less than it gathers in revenue?

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Financial Information

How satisfied are you?

Satisfied 67%

Dissatisfied 29%

DK/NA 5%

How satisfied are you with the information you receive on the government's financial performance, either directly from the government or through other sources?

Environics West

Financial Information

How satisfied are you?

	Calgary	Edmonton	Small Cities	Rural South	Rural Centre	Rural North
	Feb-03	Feb-03	Feb-03	Feb-03	Feb-03	Feb-03
Satisfied	65%	65%	69%	71%	68%	66%
Dissatisfied	29%	31%	25%	26%	29%	28%

	Male	Female	18 to 24	25 to 44	45 to 64	65+
	Feb-03	Feb-03	Feb-03	Feb-03	Feb-03	Feb-03
Satisfied	72%	61%	60%	65%	71%	66%
Dissatisfied	25%	32%	32%	30%	25%	29%

How satisfied are you with the information you receive on the government's financial performance, either directly from the government or through other sources?

Environics West