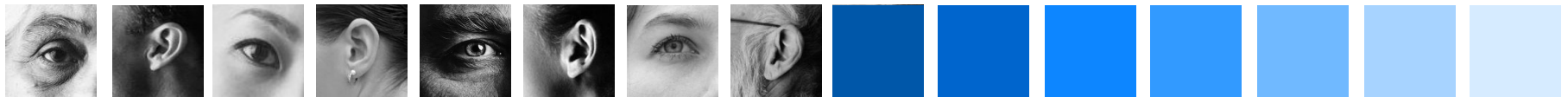


Vancouver Island: Through the eyes of Canadians



March 14– March 26, 2007

Prepared for:
Vancouver Island Economic Alliance Summit

About INNOVATIVE

- Innovative Research Group is a national public opinion research firm with offices in Toronto and British Columbia, with a presence here on Vancouver Island.
- Our mission is to give our clients unmatched insight into their challenges, by constantly looking for better ways to answer critical public affairs and corporate affairs questions.
- Our solutions integrate a wide array of research tools ranging from policy analysis to media content studies to focus groups and national telephone and online surveys.
- Our public opinion surveys have been featured in the National Post, Globe and Mail, MacLean's magazine, and many Canwest dailies, including the Vancouver Sun.



Methodology

- The online survey was conducted among current members of INNOVATIVE's Canada 20/20 panel between March 14 and March 26, 2007.
- There were 3038 responses eligible for inclusion in our analysis. After weighting a sample of this size the aggregated results are considered accurate to within ± 1.78 percentage points, 19 times out of 20, of what they would have been had a representative cross-section of Canadians eligible to vote been polled.
- The margin of error will be larger within each sub-grouping of the sample



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Provincial Comparisons

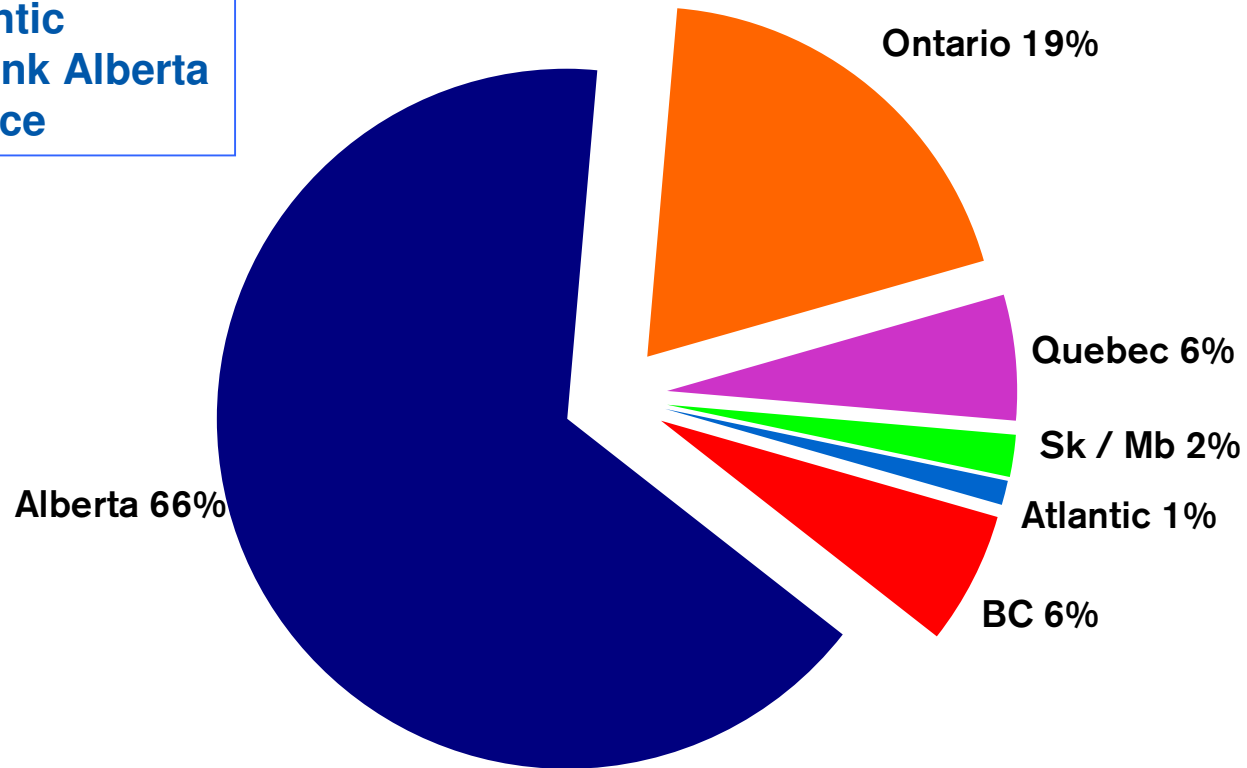


Alberta widely recognized as land of opportunity



Of all the provinces in Canada, which province or territory do you think generally offers the most economic opportunities for individuals?

79% of Atlantic residents rank Alberta as first choice

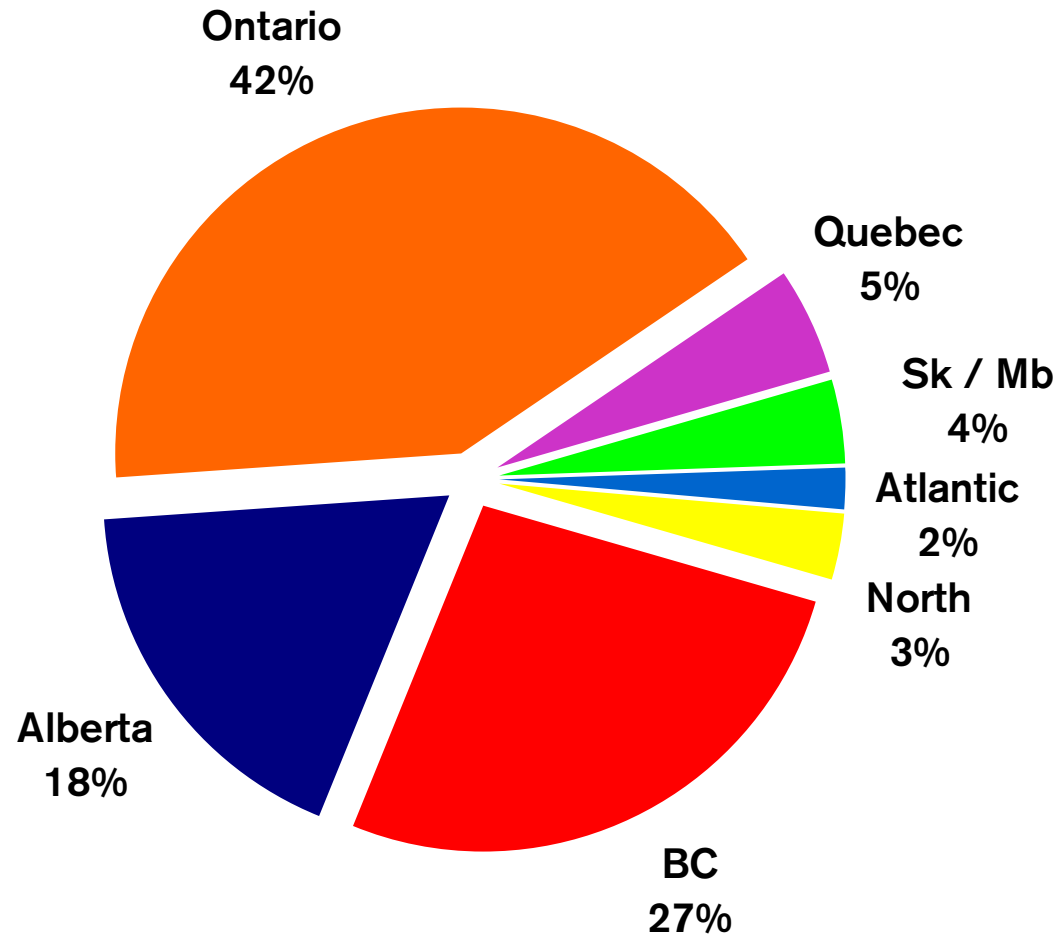


n=3038

But BC also seen as leading province



Of all the provinces in Canada, which province or territory do you think offers the second most economic opportunities for individuals?

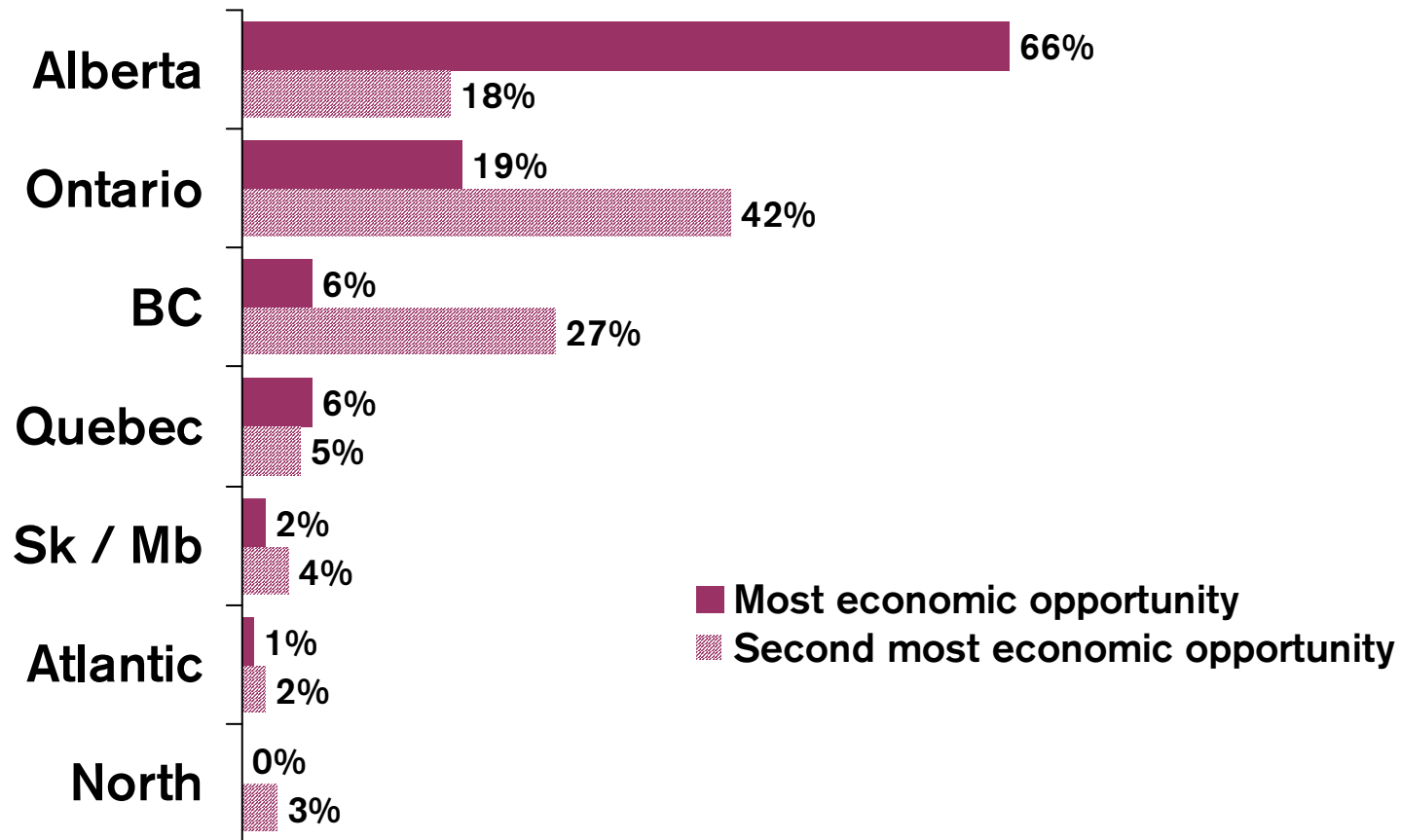


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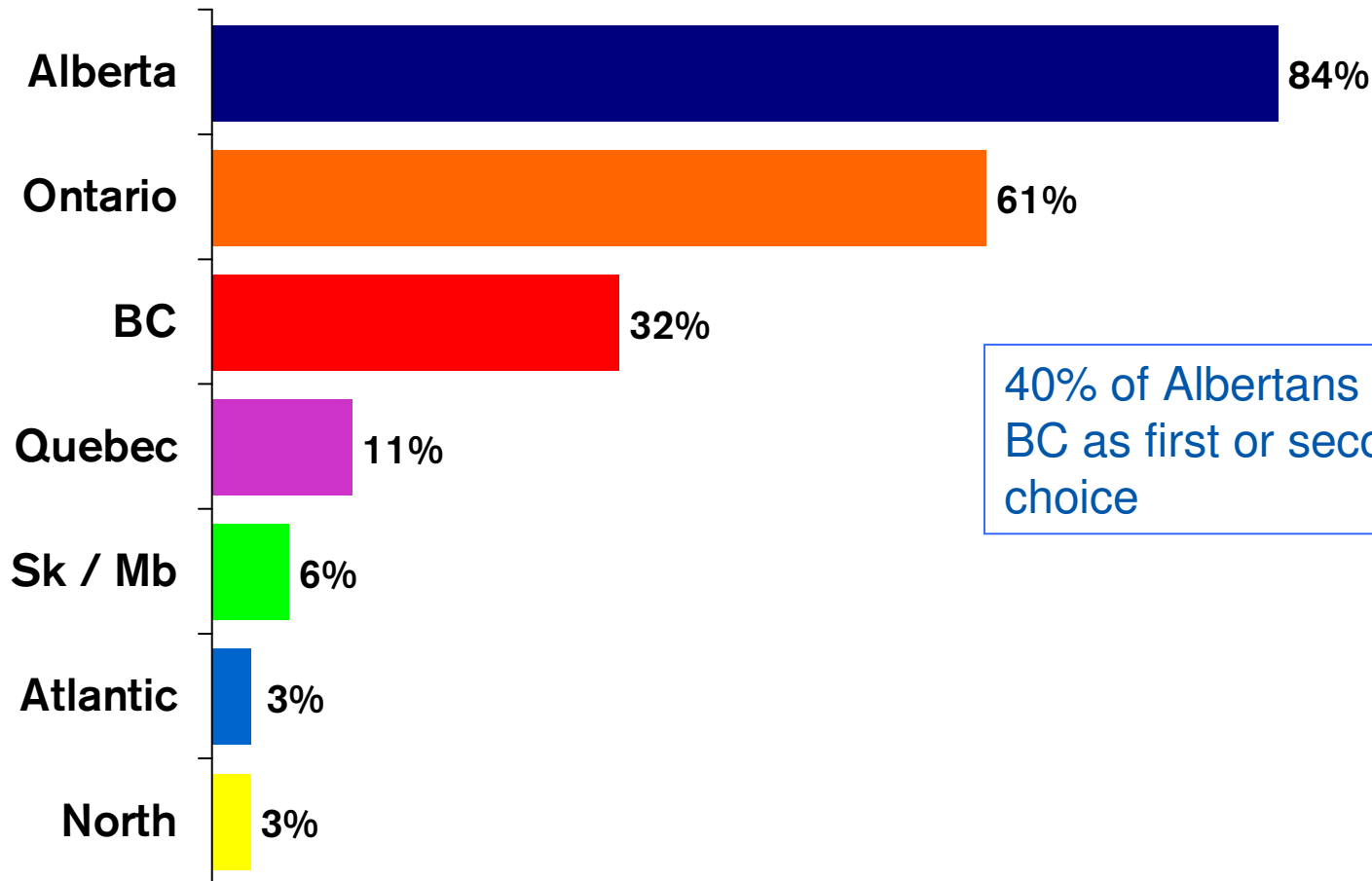


n=3038

1 in 3 Canadian say BC offers first or second most opportunities for individuals



Of all the provinces in Canada, which province or territory do you think generally offers the...
...most economic opportunities for individuals?
... the second most economic opportunities for individuals?



40% of Albertans rate BC as first or second choice

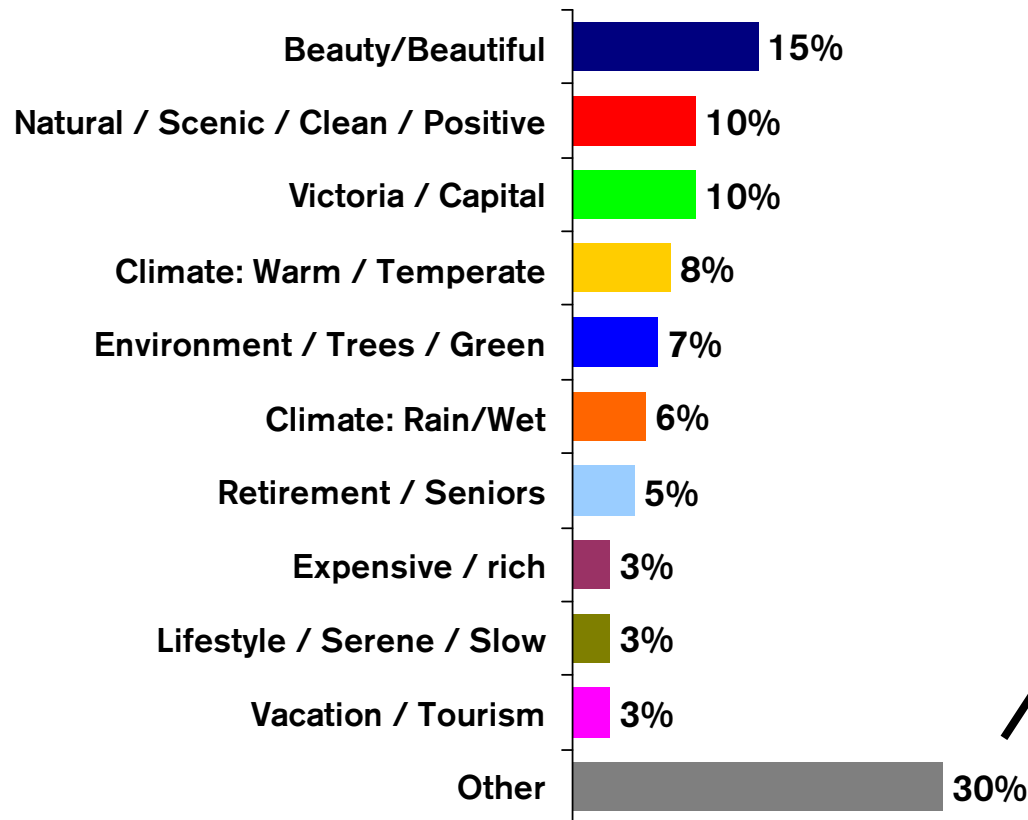


Top-of-mind descriptions of Vancouver Island



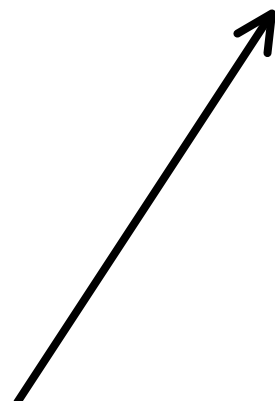
Vancouver Island noted for its beauty & scenery

Q When you think about “Vancouver Island”, what is the first word or words that come to your mind?



Other Mentions:

- 2%
 - Asian / Chinese / Immigration
 - Ferries
 - Olympics
 - Difficult to access / far away
 - Ocean / Pacific
- 1%
 - Tsunami / Earthquake
 - Drugs / Crime / Dirty
 - Home
 - Stanley Park / Whistler / Rockies
 - Hippies



Coming & Going to the Island



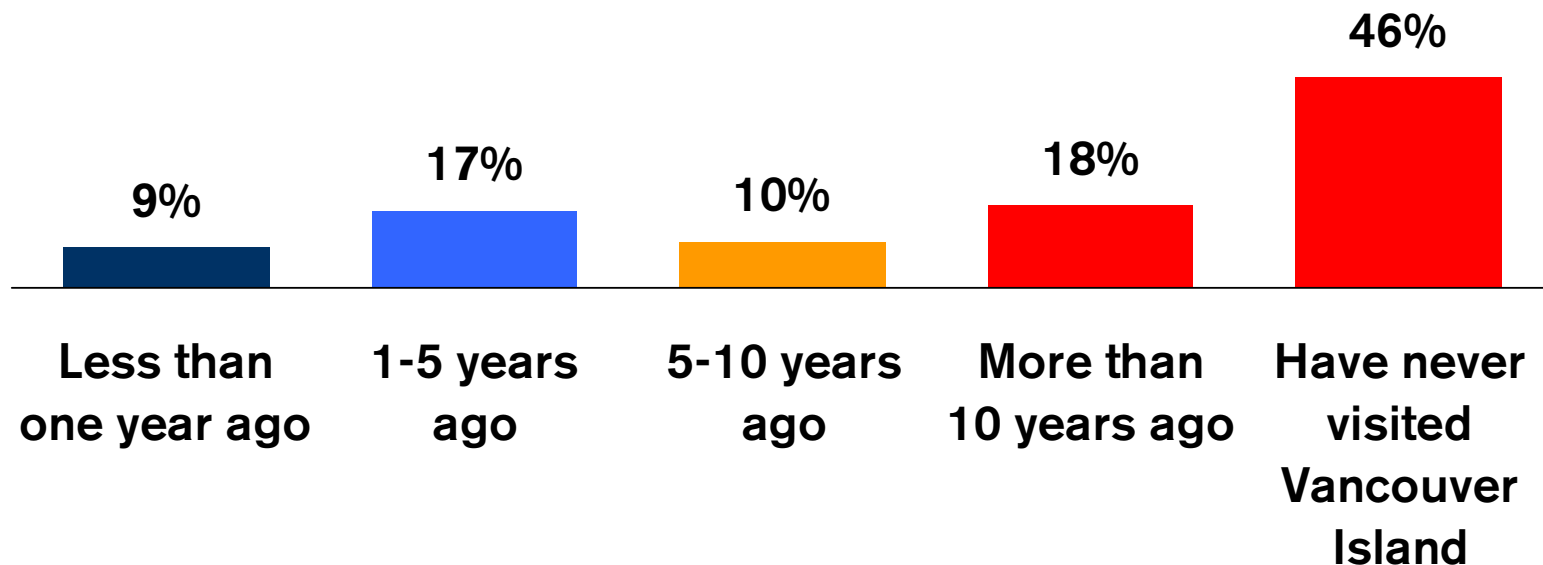
Over half say they have visited Vancouver Island



When was the last time you visited (or traveled to) Vancouver Island...?

83% of Albertans say they have visited the Island

54% have visited Vancouver Island



n=2,944

•Excludes Island residents

Half say Vacation is their reason for visiting

Q What was the purpose of your last visit to Vancouver Island? Was it...

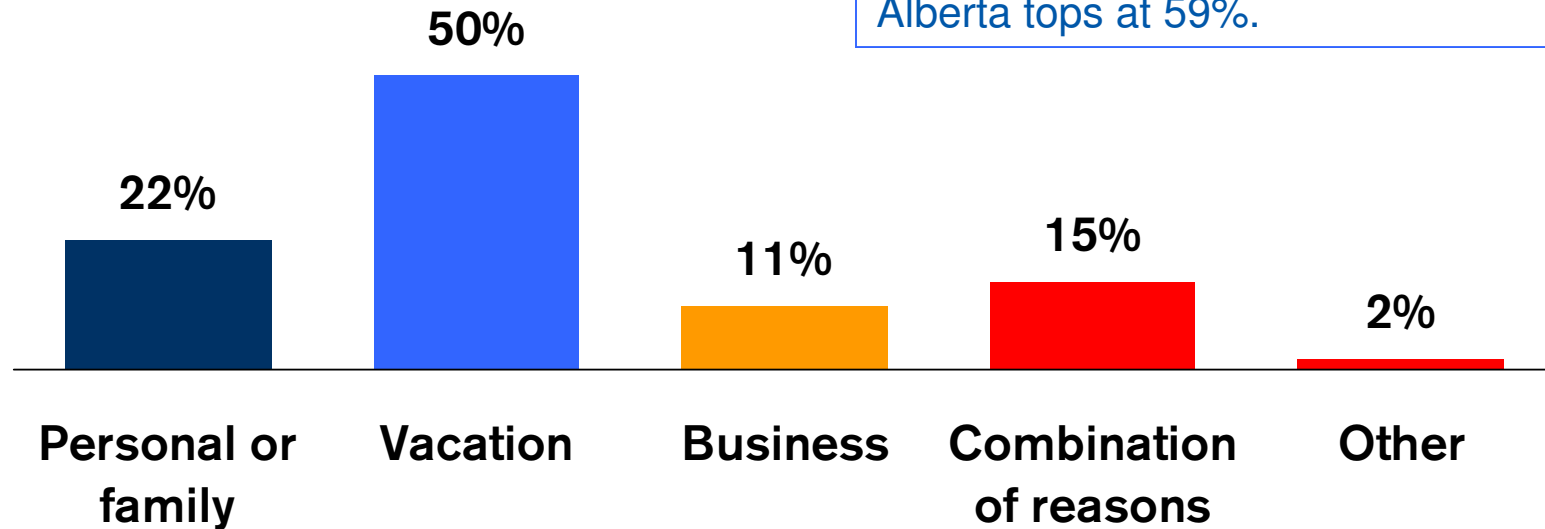
Personal or family

#1 - BC 34%; #2 – Sk / Mb 29%

Vacation

Outside BC, all provinces over 50%.

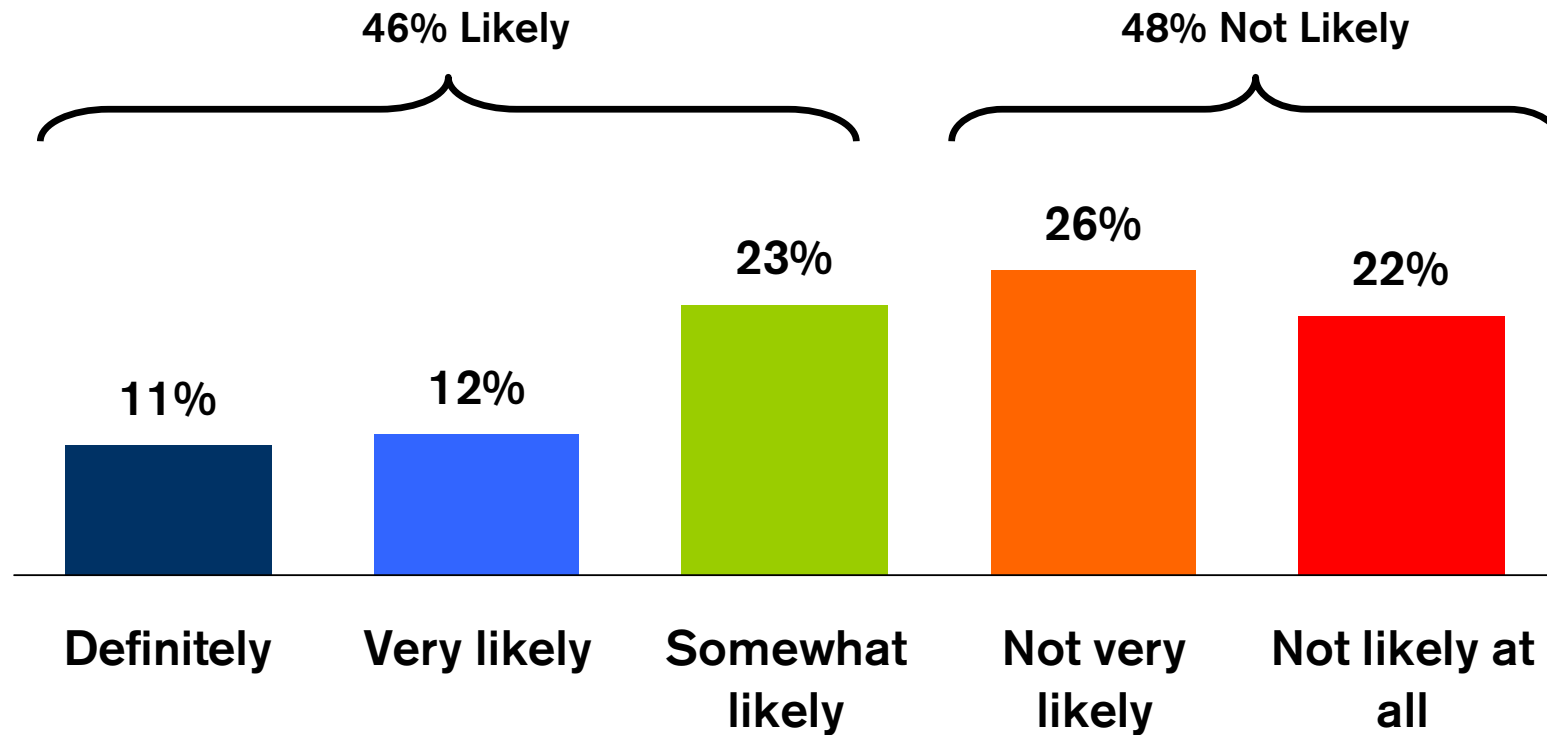
Alberta tops at 59%.



Almost half say they will visit within next 3 years



How likely is it that you will visit Vancouver Island within the next three years? Are you ...

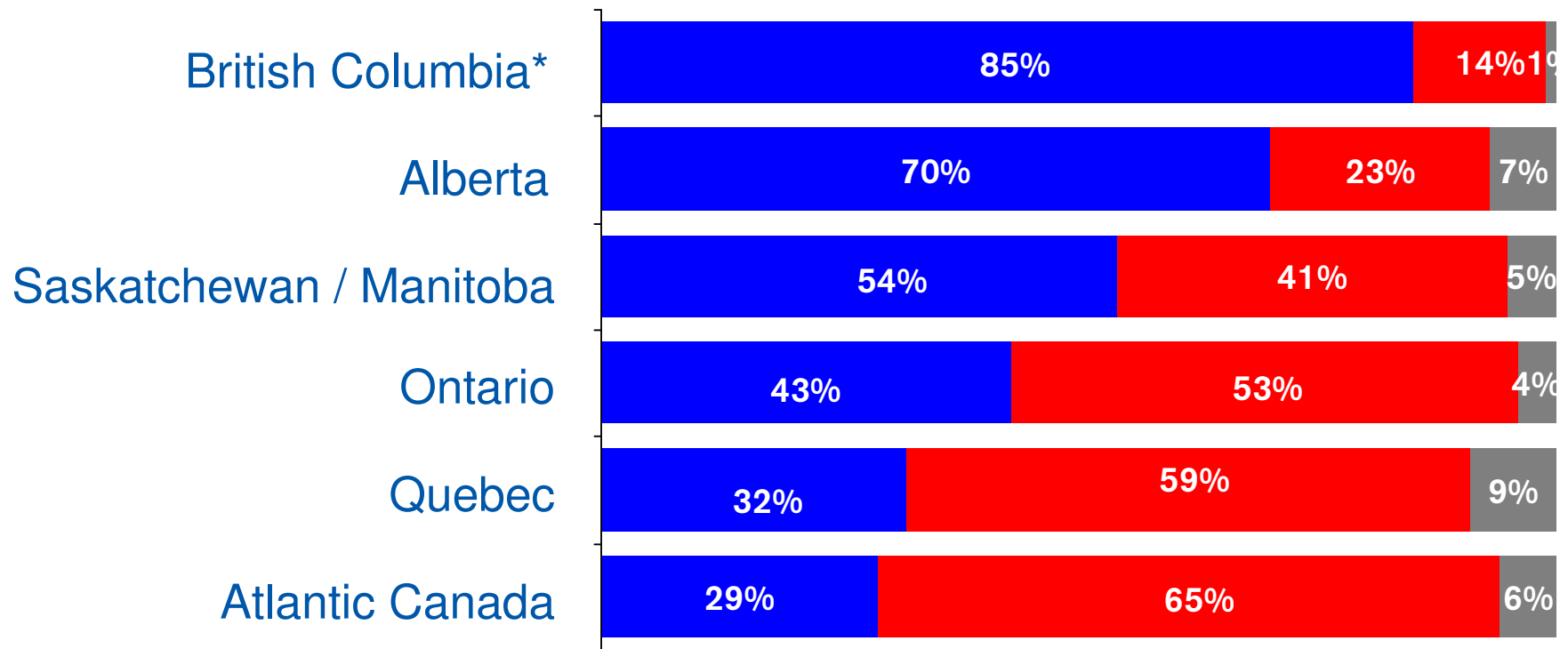


n=1,577

Note: 'Don't know' (6%) not shown

Likelihood to visit decreases the further east you go

Q How likely is it that you will visit Vancouver Island within the next three years? Are you ...



■ Likely
 ■ Not Likely
 ■ Don't Know



n=2,944

•Excludes Island residents

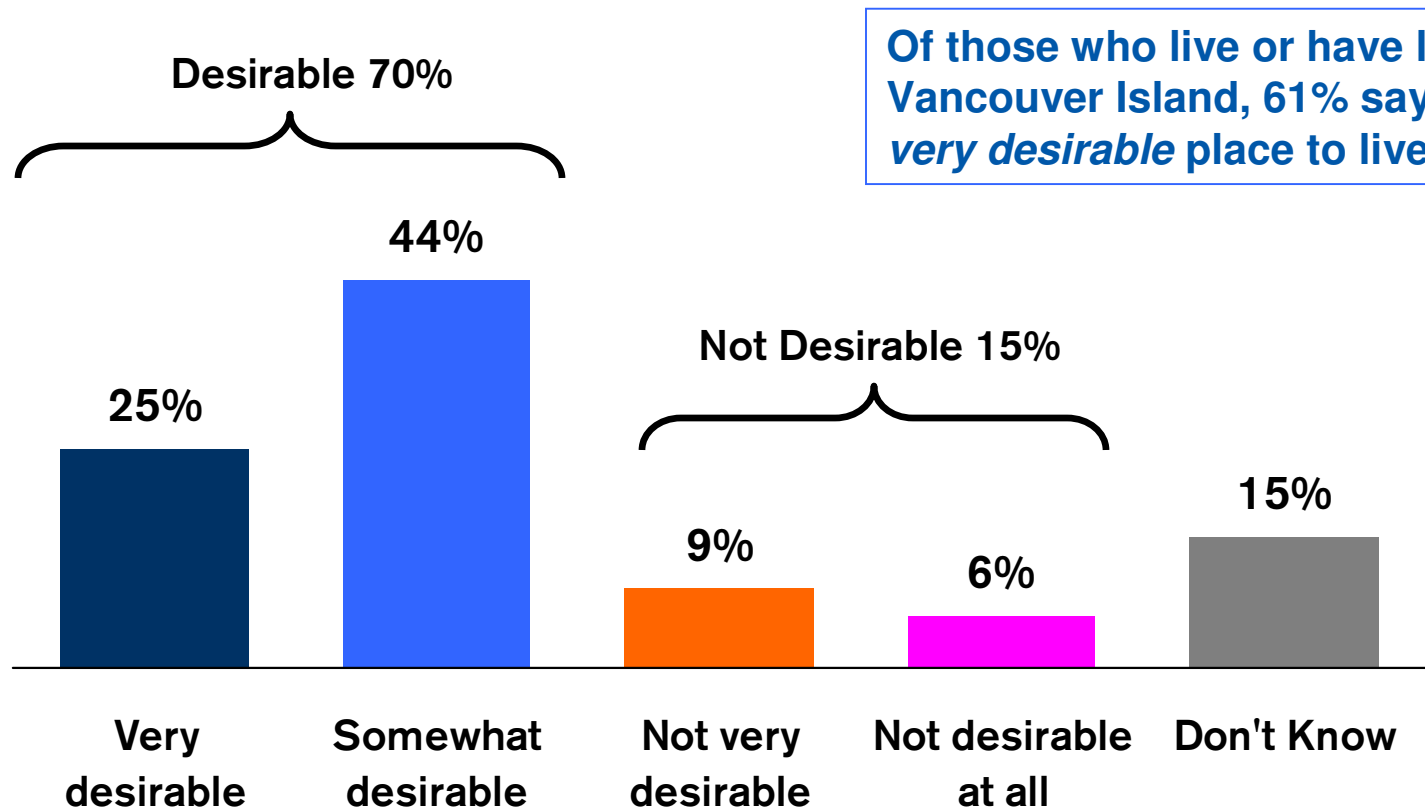


Perceptions about Vancouver Island



More than two-thirds see Vancouver Island as desirable place to live

Q Based on what you know, how desirable do you consider Vancouver Island as a place to live? Is it ...



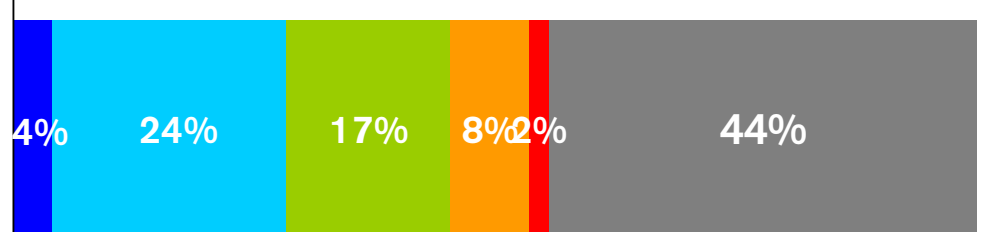
Of those who live or have lived on Vancouver Island, 61% say it is a *very desirable* place to live



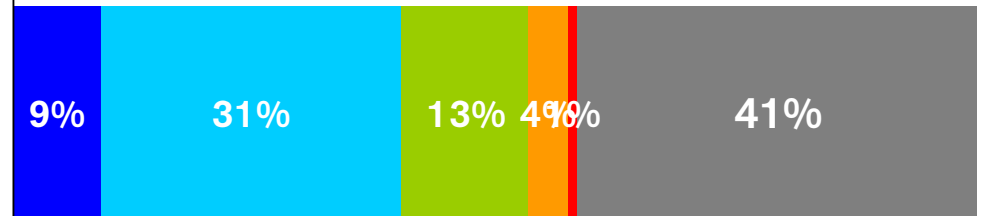
Canadians do not have strong impressions about the Island's economic profile

Q Do you agree or disagree with the following statements?

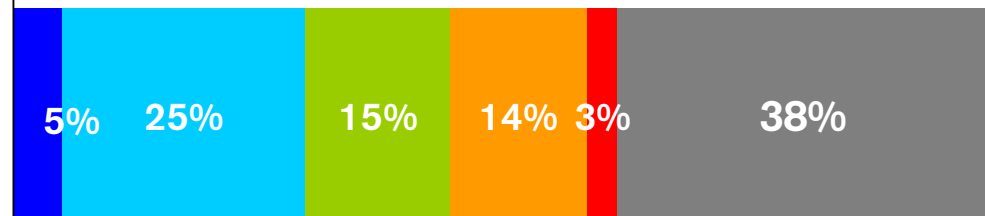
Vancouver Island is a great place to start a successful small business



Vancouver Island has an educated, skilled labour force.



Vancouver Island is heavily dependent on natural resources and lacks a diversified economy.



Strongly agree **Somewhat agree**
Neither agree nor disagree **Somewhat disagree**
Strongly disagree **Don't know**



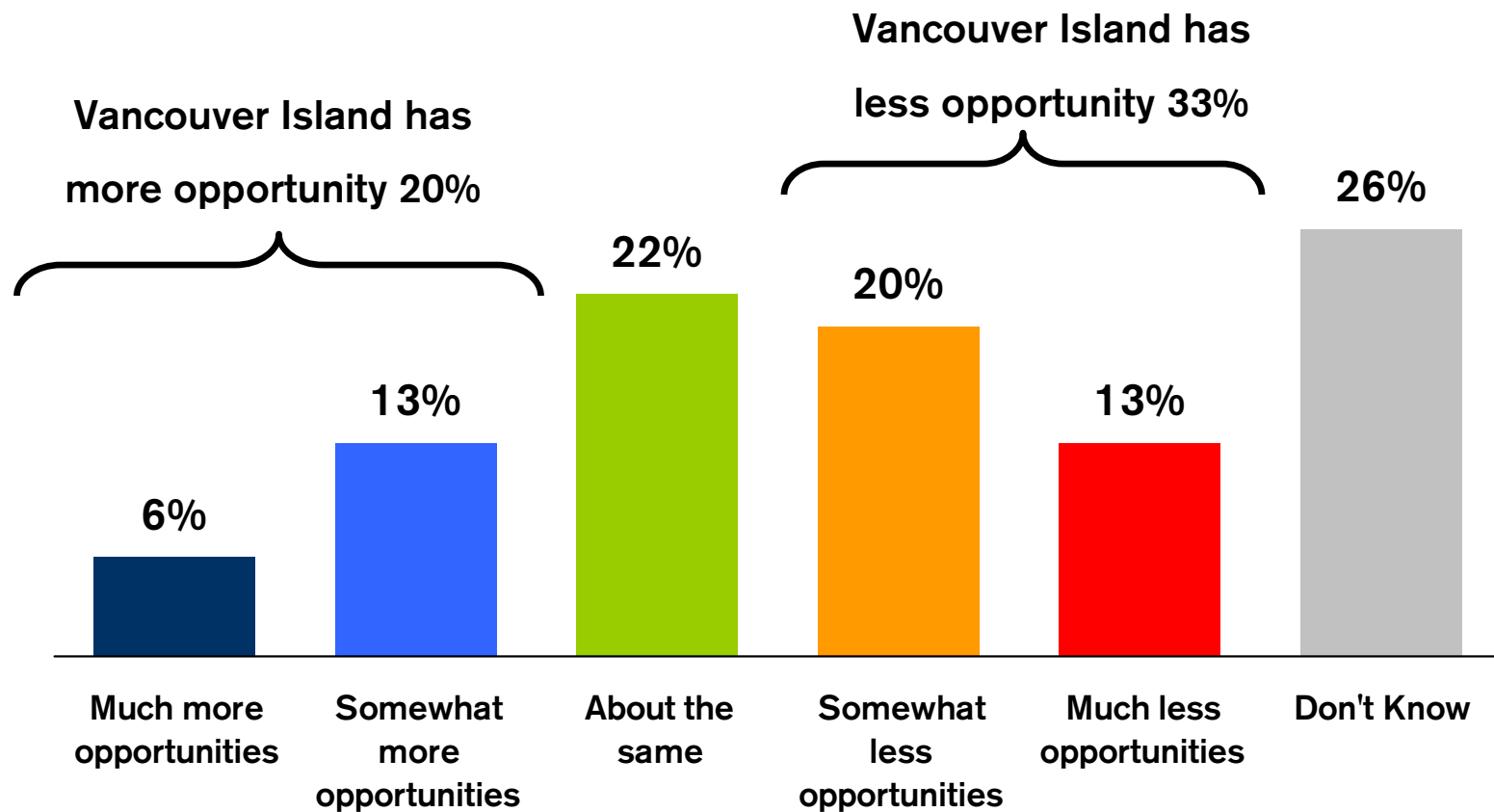
How Vancouver Island compares to home regions



Vancouver Island faces stiff competition



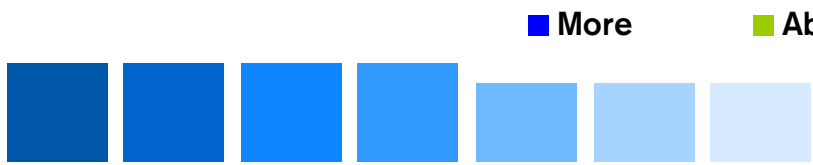
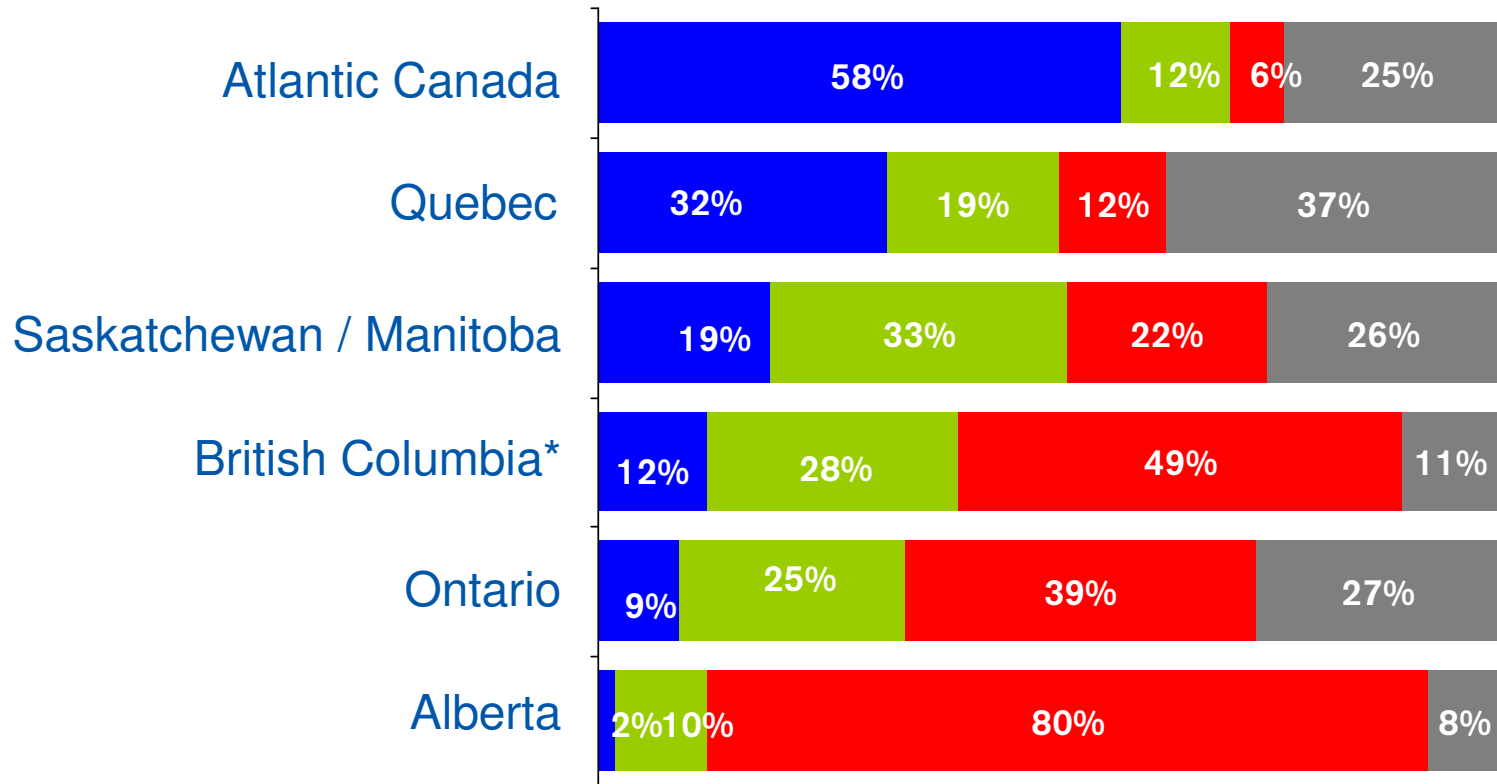
Would you say, compared to the region where you live right now, Vancouver Island has more or less opportunities for people to find good, well-paying jobs, or is it about the same?



n= 2,944

Atlantic & Quebec residents see Island opportunity

Q Would you say, compared to the region where you live right now, Vancouver Island has more or less opportunities for people to find good, well-paying jobs, or is it about the same?



n = 2,944

*Excludes Island residents



The Island as a place to **live**, work & play

- Vancouver Island is well-regarded for its beauty and its setting, and is seen by over two-thirds of Canadians as a desirable or very desirable place to live.
- Vancouver Island's greatest advocates are those that live or have lived there – 61% say Vancouver Island is a “very desirable” place to live compared to 25% across Canada.



The Island as a place to live, work & play

- Vancouver Island faces stiff competition from other provinces and regions in Canada, particularly from Alberta. More Canadians see more opportunity in their own regions, than with Vancouver Island.
- Across Canada, more people agree than disagree that Vancouver Island is a great place to start a small business, but most don't know. Of those who have lived on the Island, 54% agree.



The Island as a place to live, work & play

- Vancouver Island is widely seen as a place for vacationing and almost half of those surveyed across Canada plan a trip to Vancouver Island within the next three years.
- Albertans are three times as likely to describe Vancouver Island as a vacation or holiday place, and are more likely than other Canadians to have vacation as their reason to visit.



Conclusion

- Vancouver Island is seen as having great natural and environmental assets, and as a highly desirable place to visit or live. It's strongest advocates are those that know it best.
- It faces stiff competition when it comes to perceptions as a place of economic opportunity for individuals.
- Alberta presents both challenges and opportunity. While Alberta is clearly an economic juggernaut in the minds of Canadians, Albertans themselves are a very important target market for vacationing and retirement on Vancouver Island.

