

How Canada Sees Saskatchewan

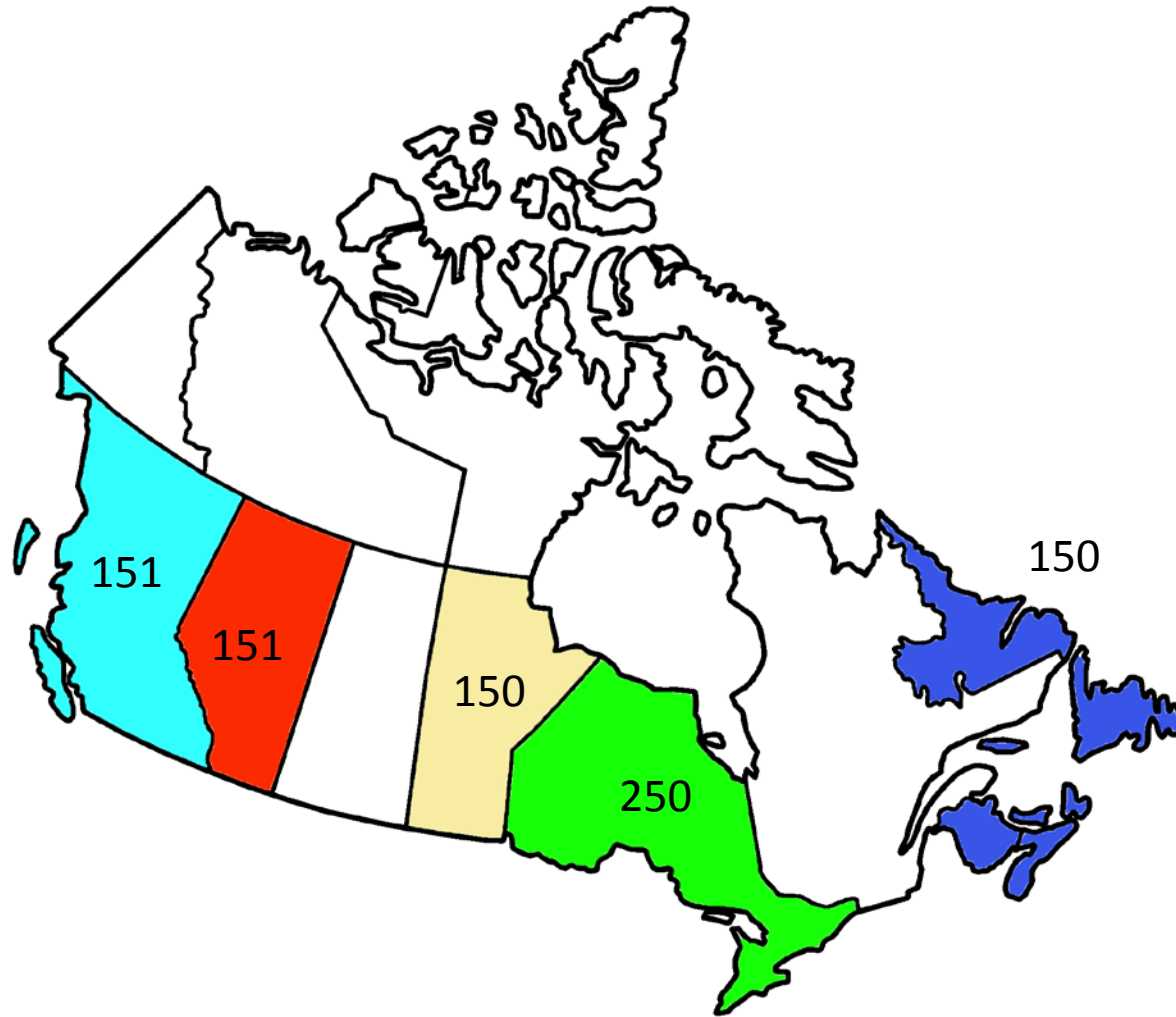
May 2015



We asked Canadians...

- What are Canadian's top of mind impressions of Saskatchewan?
- What are Saskatchewan's strengths & weaknesses?
- How's Saskatchewan's economy doing?
- Have things changed economically in Saskatchewan recently?
- Does Saskatchewan's contributions to the Canadian economy matter?
- How does Saskatchewan fare as a place to live, work, and play?

Independent online study with 852 Canadians



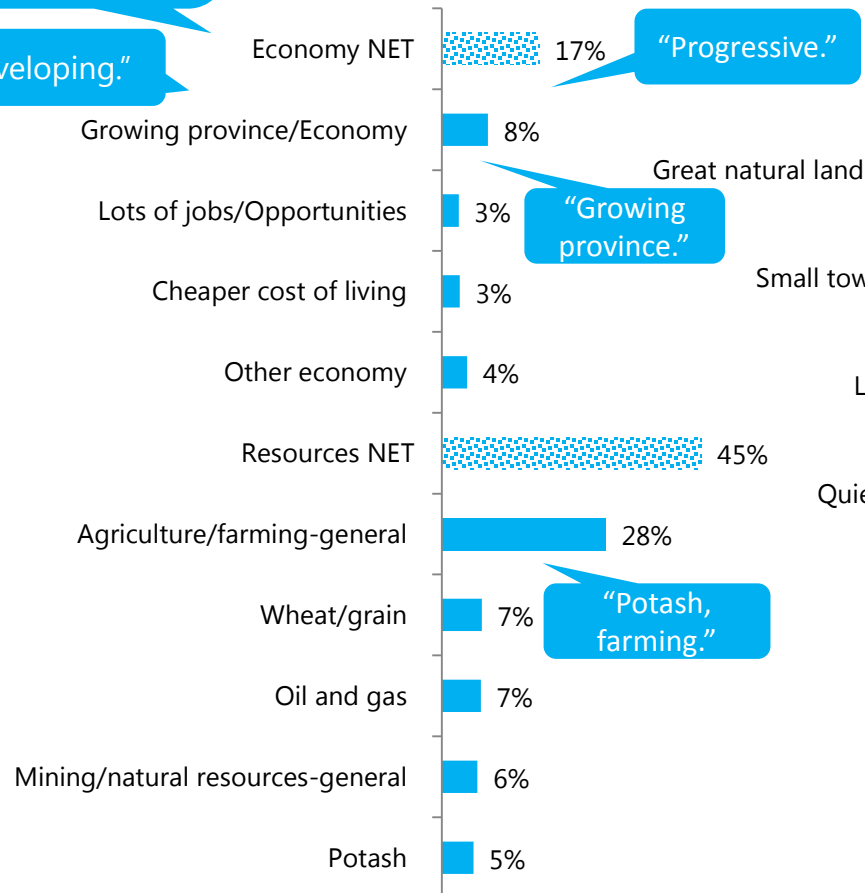
Data collected between May 5th and May 11th, 2015 using Research Now's online panel. Data weighted for national representation.

Saskatchewan's perceived strengths centre on resources, the economy and quality of life.

"It's probably a lot easier to live out there right now with the way the economy is."

"Developing."

Saskatchewan Strengths: Economy and Resources

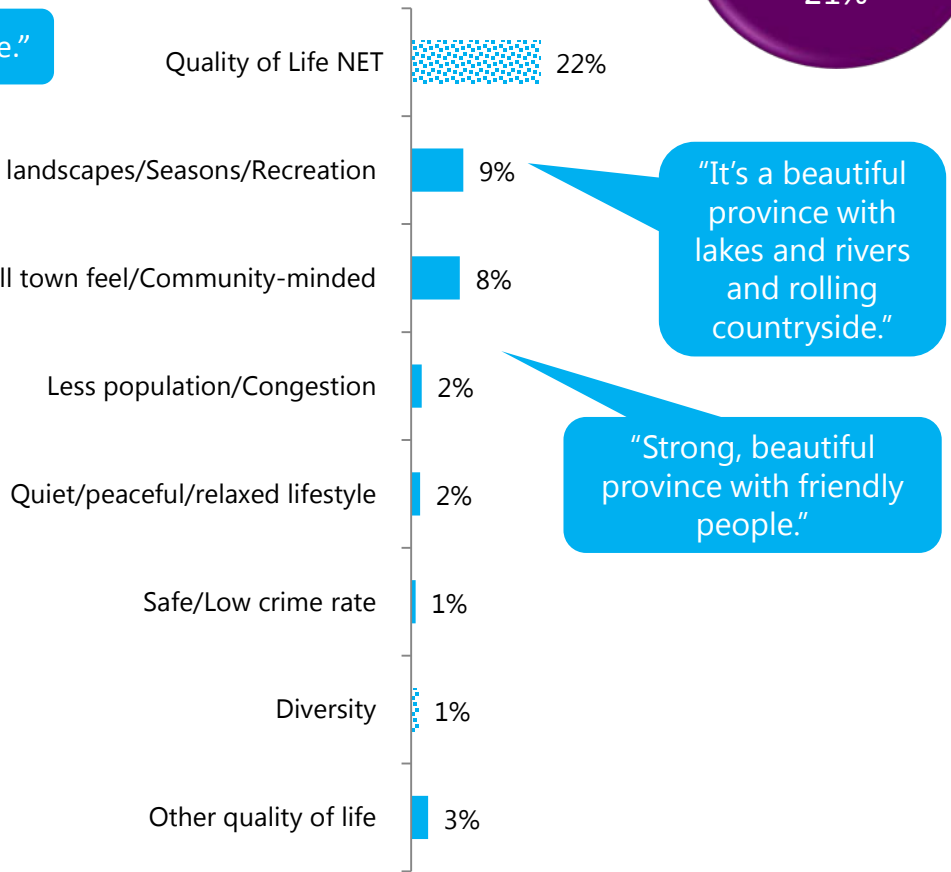


"Progressive."

"Growing province."

"Potash, farming."

Saskatchewan Strengths: Quality of Life



Don't Know / No Comment: 21%

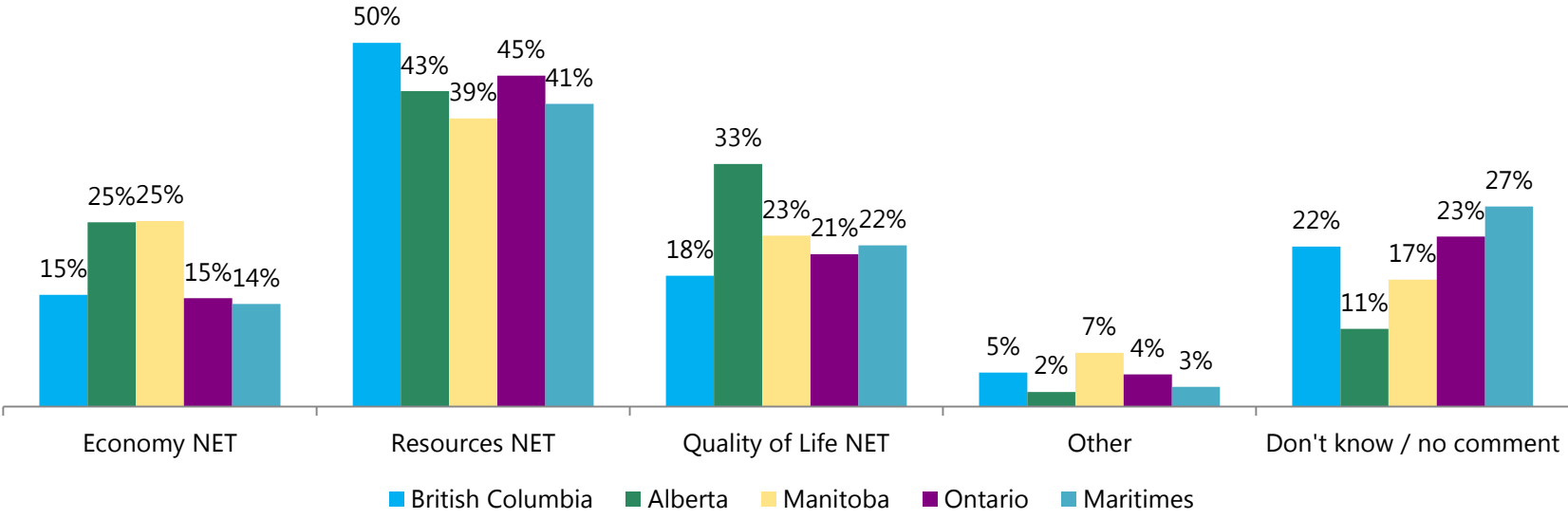
"It's a beautiful province with lakes and rivers and rolling countryside."

"Strong, beautiful province with friendly people."

7. What do you believe are Saskatchewan's strengths?.... Base: All respondents, n = 852.

Resources are universally seen as Saskatchewan's strength but Albertans are more likely to comment on quality of life.

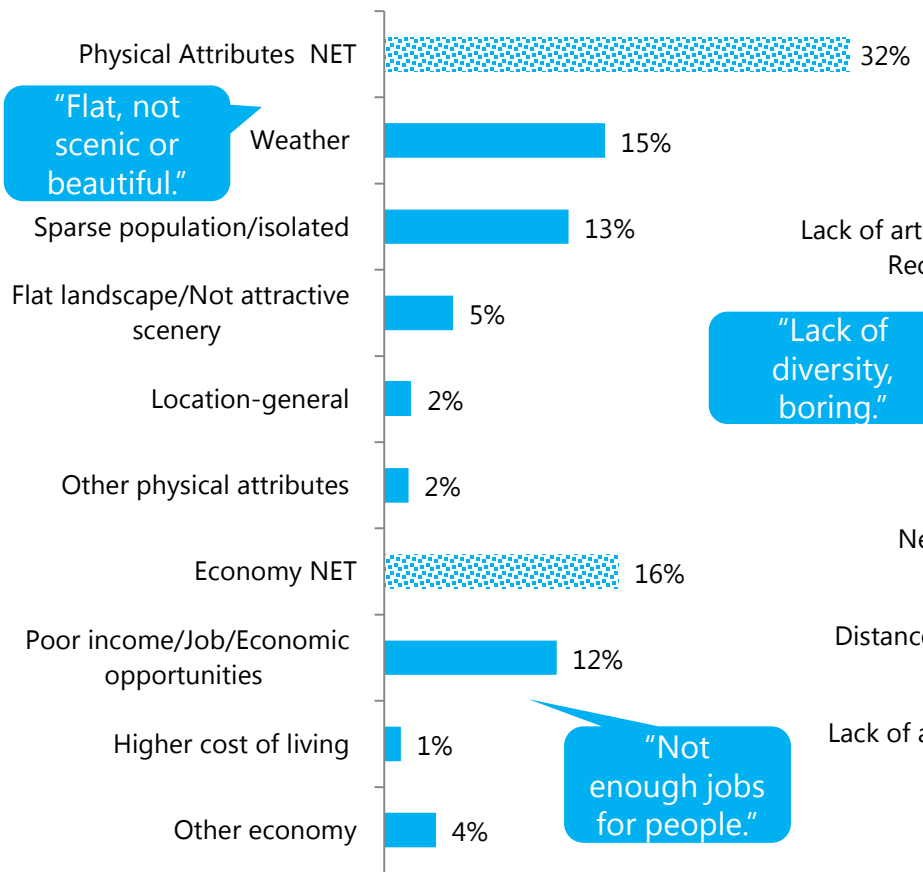
Perception of Saskatchewan's Strengths by Home Province



7. What do you believe are Saskatchewan's strengths?..... Base: All respondents, n = 852.

The biggest perceived weaknesses include physical attributes. Economic performance is likely lower than seen in the past.

Saskatchewan's Weakness: Economic and Physical Attributes

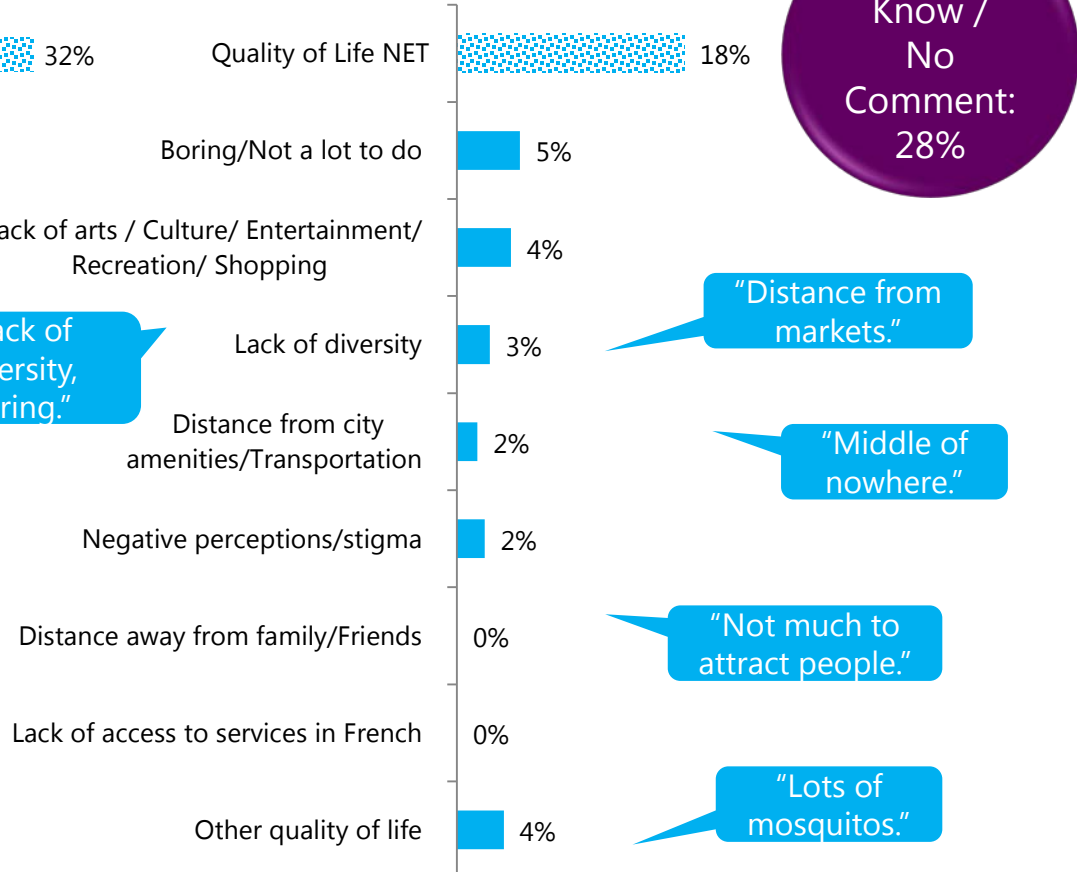


"Flat, not scenic or beautiful."

"Lack of diversity, boring."

"Not enough jobs for people."

Saskatchewan Weaknesses: Quality of Life



Don't Know / No Comment: 28%

"Distance from markets."

"Middle of nowhere."

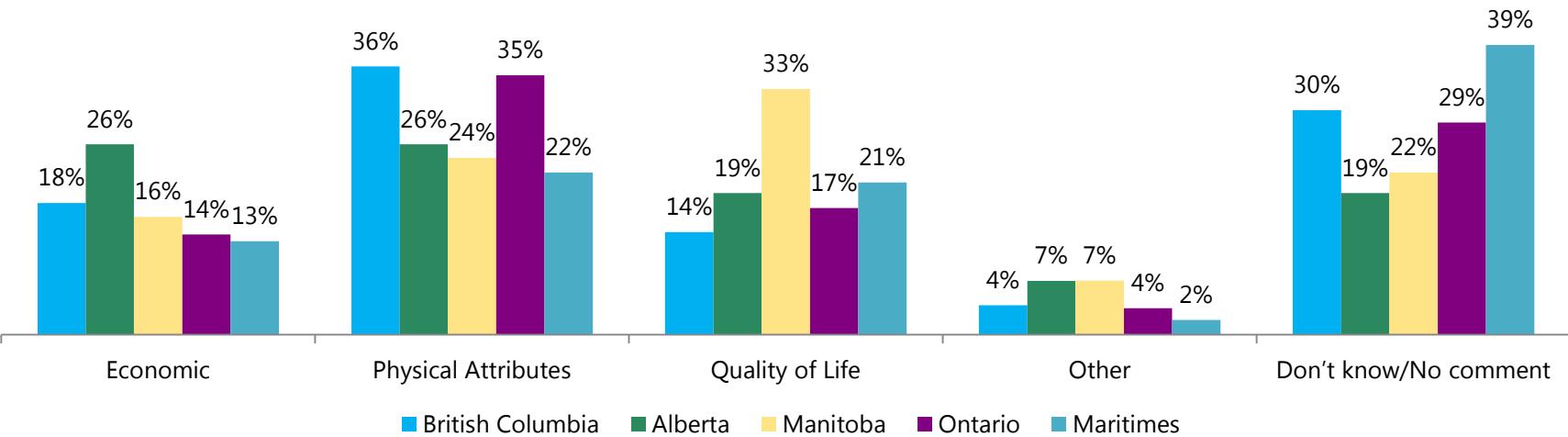
"Not much to attract people."

"Lots of mosquitos."

8. What do you believe are Saskatchewan's weaknesses?..... Base: All respondents, n = 852.

B.C. and Ontario most commonly cite physical attributes as Saskatchewan weaknesses while quality of life is commonly noted among Manitobans.

Perception of Saskatchewan's Weakness by Home Province

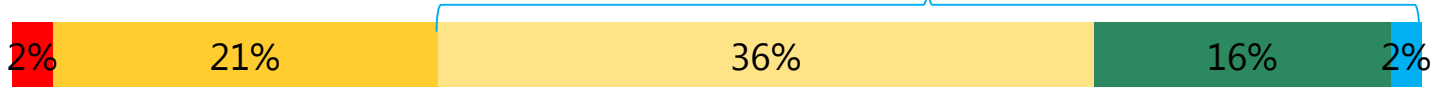


8. What do you believe are Saskatchewan's weaknesses?..... Base: All respondents, n = 852.

More than one half rate Saskatchewan's economy as good or better.

Overall Perception of Saskatchewan's Economy

54% have a positive view of Saskatchewan's economy

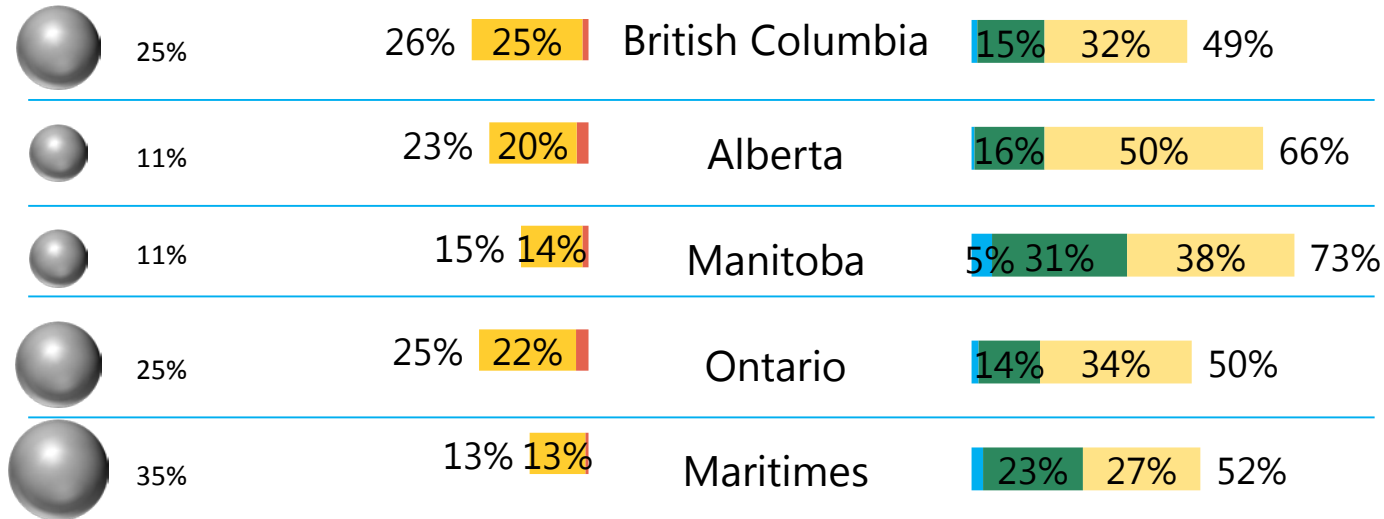


Not Sure: 23%

■ Poor ■ Fair ■ Good ■ Very good ■ Excellent

Overall Perception of Saskatchewan's Economy by Home Province

Not Sure

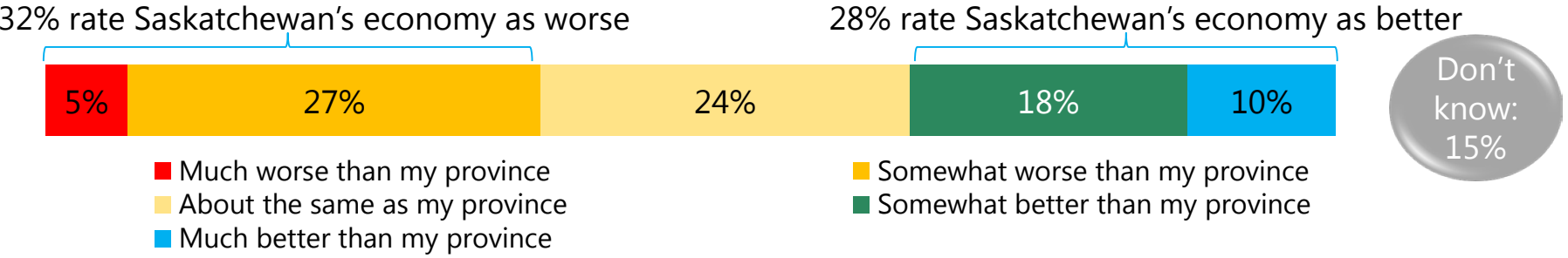


■ Poor ■ Fair ■ Excellent ■ Very good ■ Good

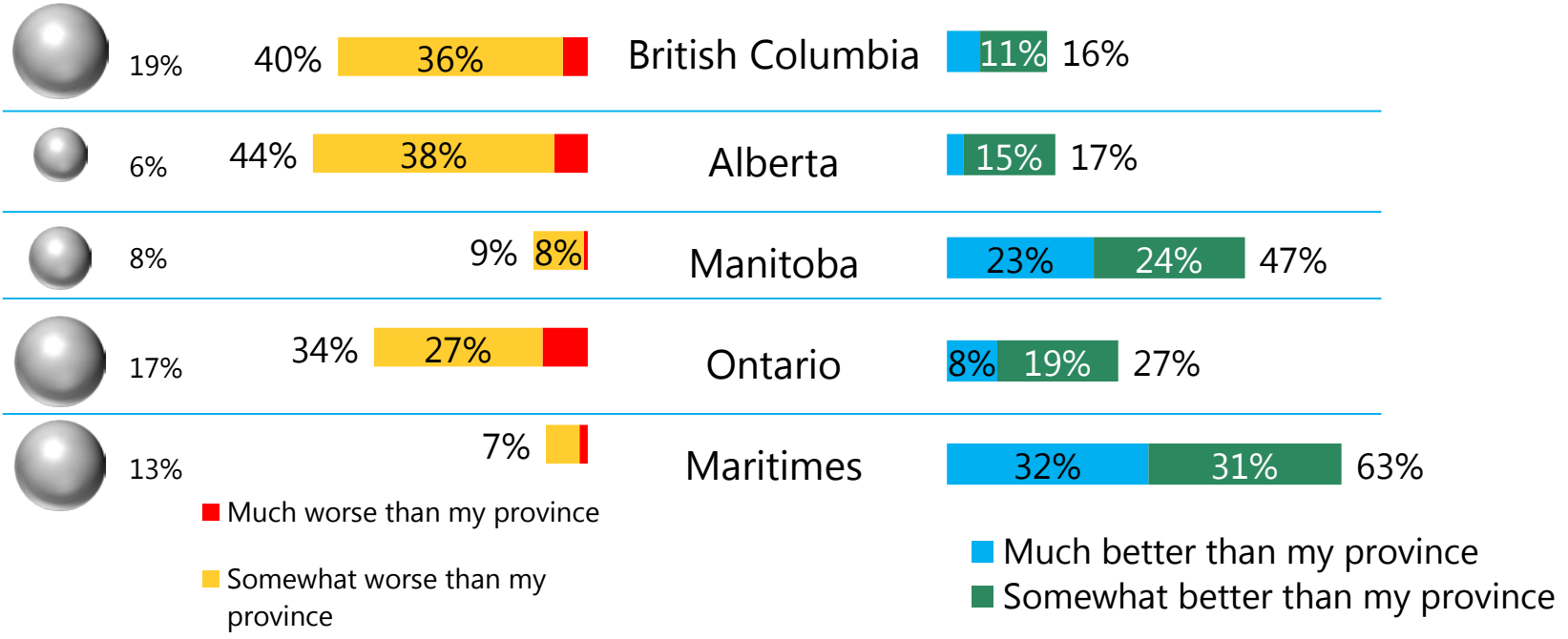
9. Overall, how would you rate Saskatchewan's current economy? Base: All respondents, n = 852.

Canadians are divided on perceptions of Saskatchewan's economy compared to their own, with stark regional differences.

Perception of Saskatchewan Compared to Home Province

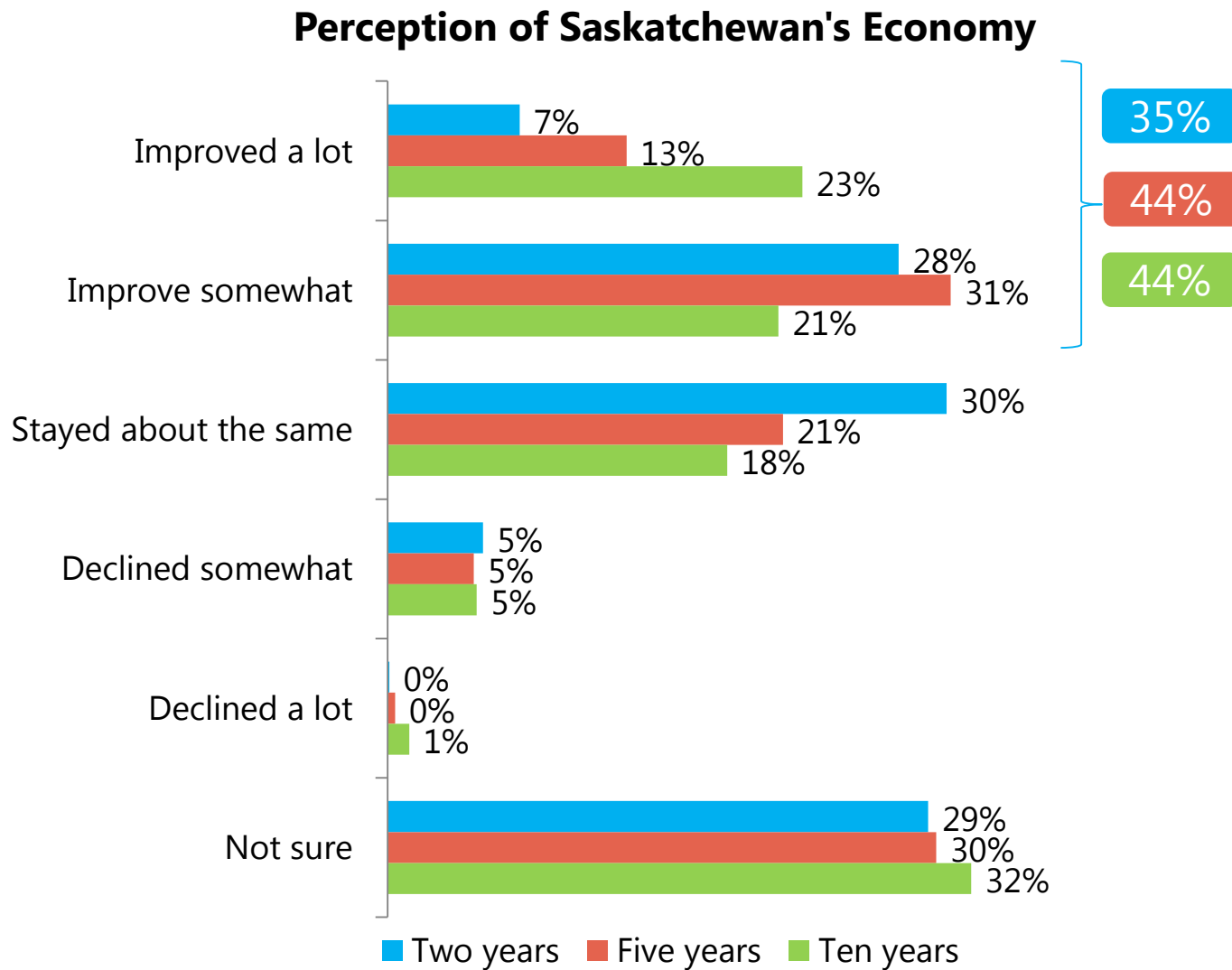


Perception of Saskatchewan Compared to Home Province



10. Compared to your home province, would you say that Saskatchewan's current economy is better, worse or the about the same? Base: All respondents, n = 852.

Canadians recognize that Saskatchewan's economy has improved in the last decade.

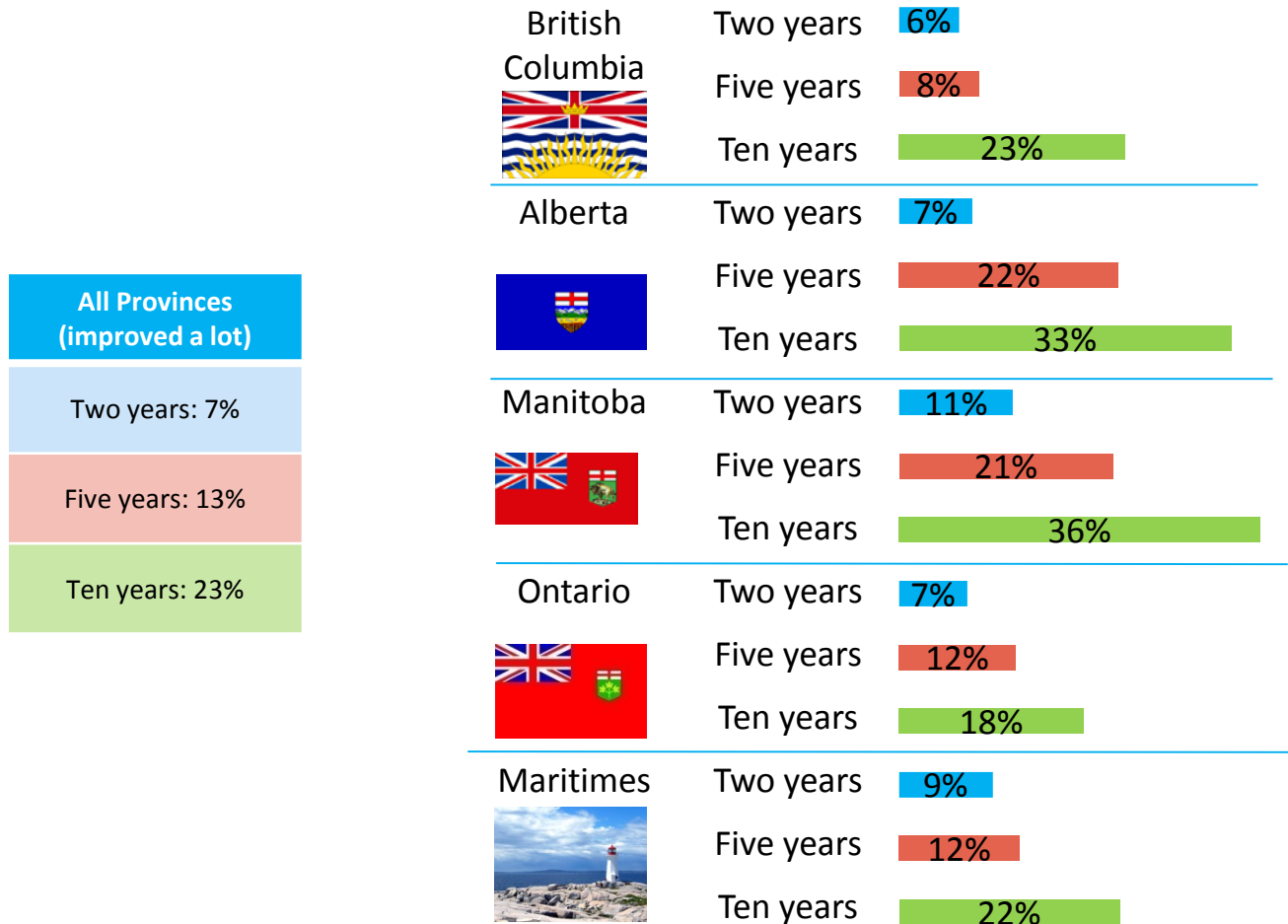


11. To the best of your knowledge, has Saskatchewan's current economy improved, declined or remained the same over the past.... Base: All respondents, n = 852.

Our neighbours are more likely to acknowledge this economic growth.

Perception of Saskatchewan's Economy by Home Province

(Improved a lot)

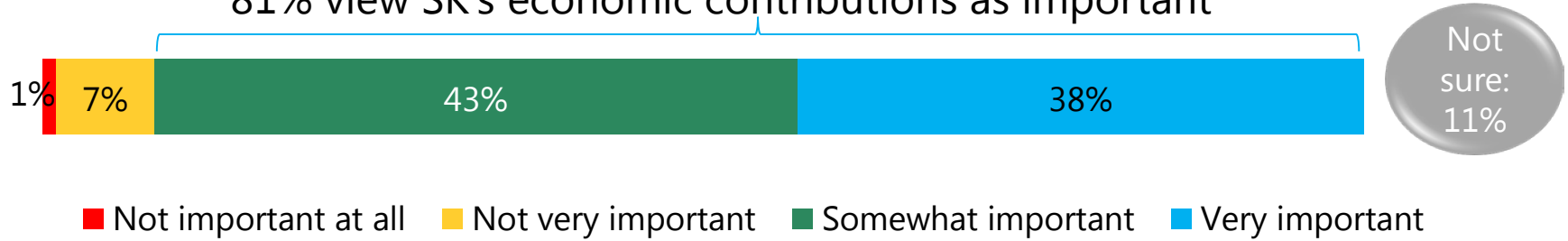


11. To the best of your knowledge, has Saskatchewan's current economy improved, declined or remained the same over the past.... Base: All respondents, n = 852.

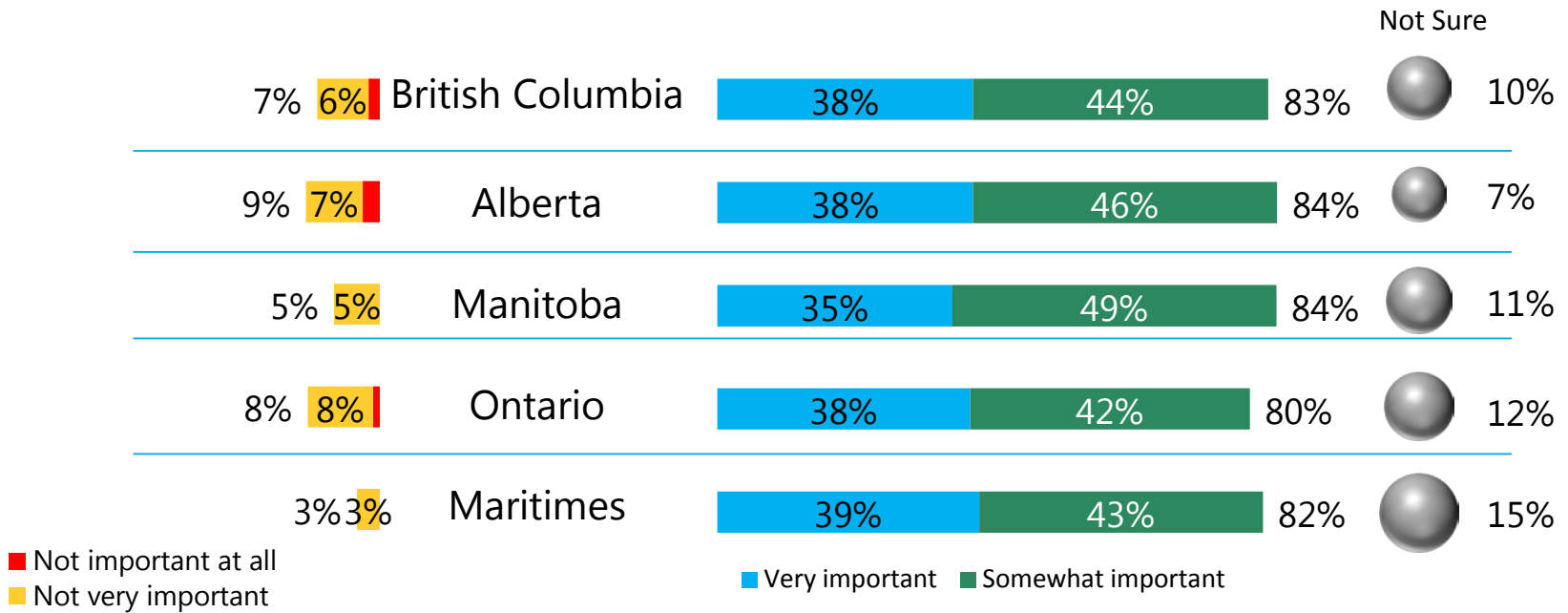
Canadians universally see Saskatchewan's contributions to the national economy as important.

Perception of Saskatchewan's Contribution to Canada's Economy

81% view SK's economic contributions as important



Perception of Saskatchewan's contribution to Canada's Economy by Province

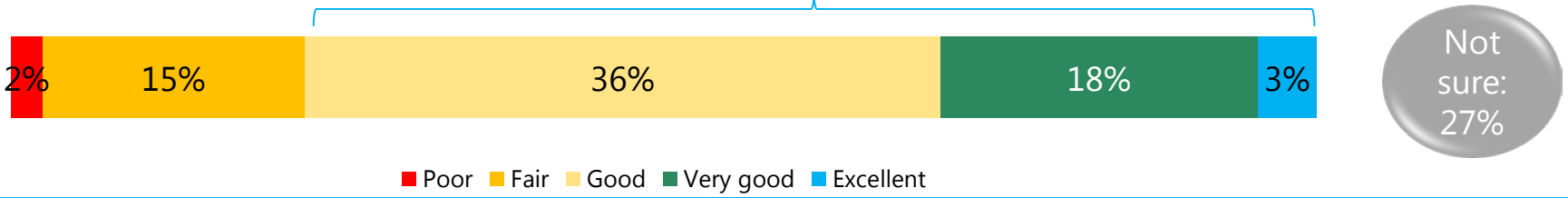


12. How important are Saskatchewan's contributions to Canada's economy? Base: All respondents, n = 852.

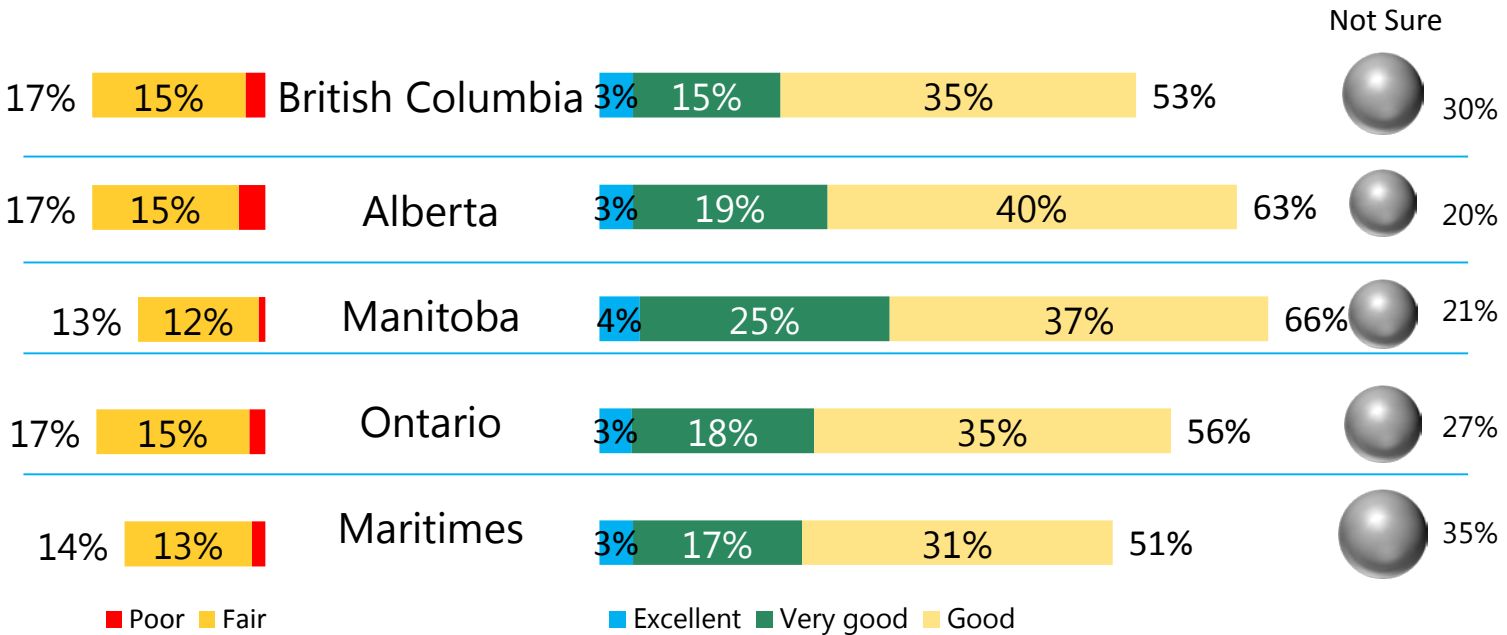
Nearly six in ten Canadians view Saskatchewan as business-friendly. Our neighbours are our biggest advocates.

Perception of Saskatchewan as Business-Friendly

57% view SK as business-friendly



Perception of Saskatchewan as Business Friendly by Province

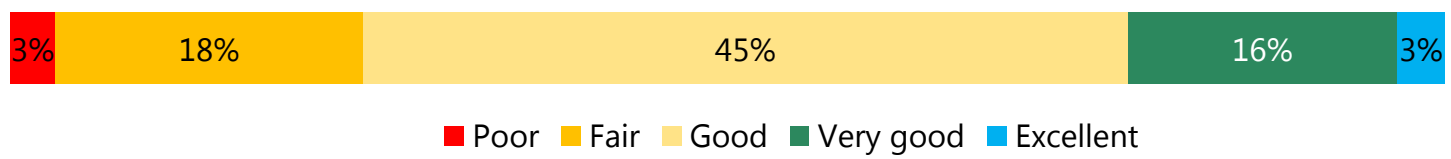


13. Overall, how would you rate Saskatchewan in terms of being business-friendly? Base: All respondents, n = 852.

Nearly two thirds perceive Saskatchewan as having a good quality of life.

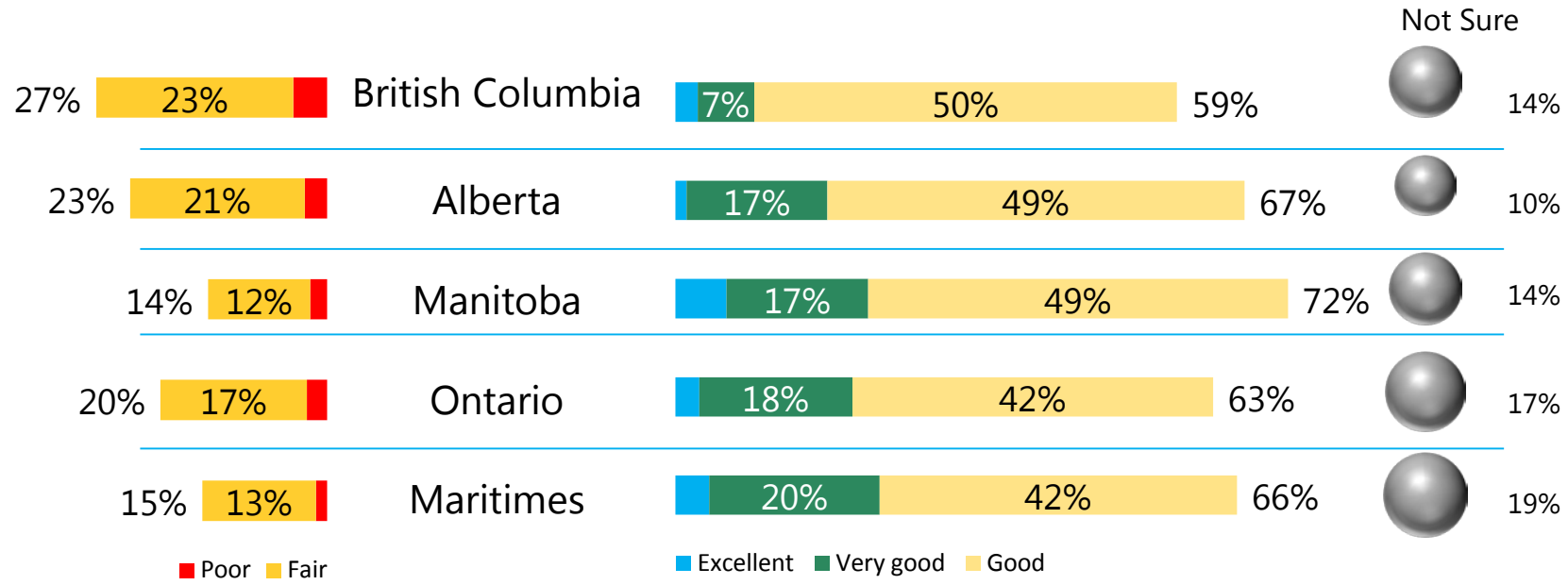
Perception of Saskatchewan's Quality of Life

64% view SK as having a good Quality of Life



Not sure: 16%

Perception of Saskatchewan's Quality of Life by Province

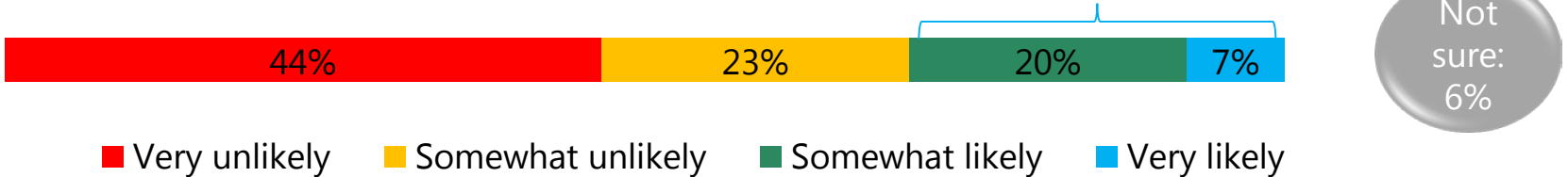


14. How would you describe the quality of life in Saskatchewan? Base: All respondents, n = 852.

One quarter of Canadians would consider moving to Saskatchewan, and likelihood is consistent across provinces with the exception of B.C.

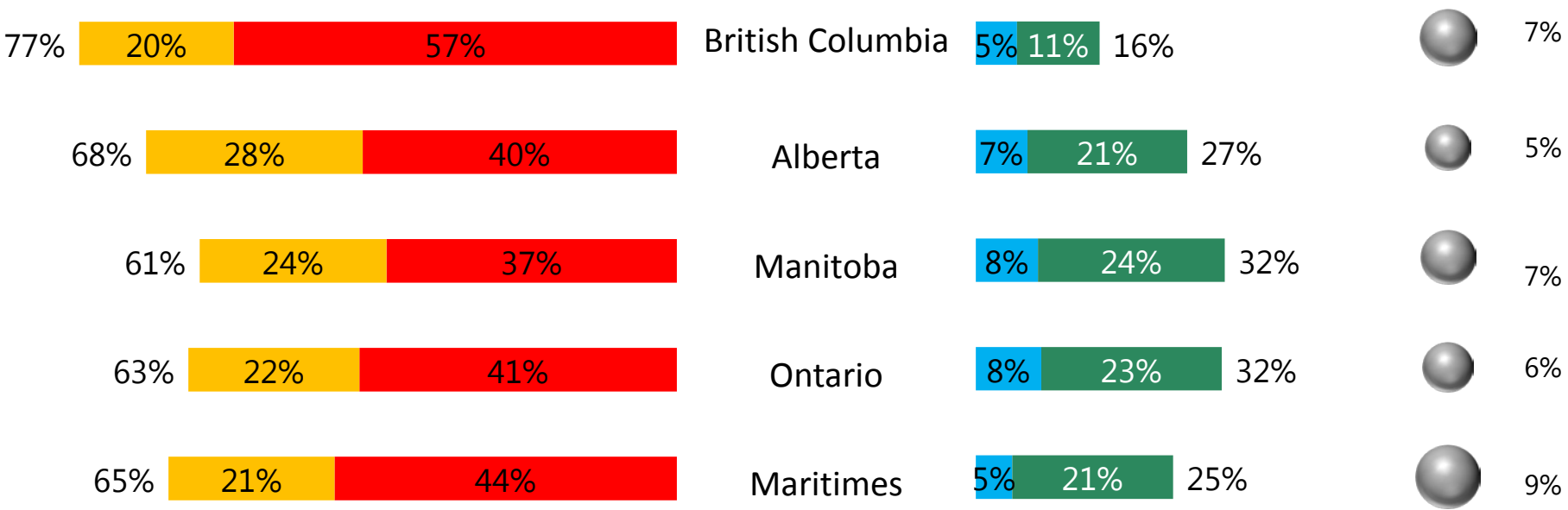
Likelihood to Move to Saskatchewan

27% of individuals would consider moving to SK



■ Very unlikely ■ Somewhat unlikely ■ Somewhat likely ■ Very likely

Likelihood to Move to Saskatchewan by Home Province



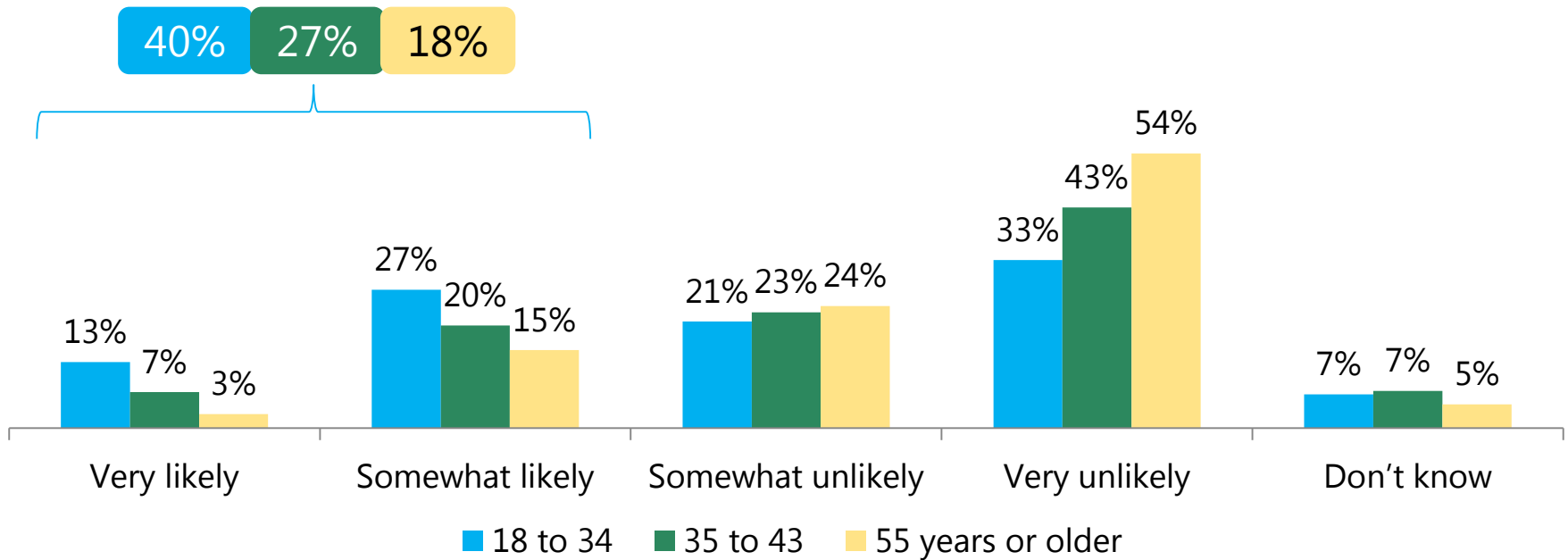
■ Very unlikely ■ Somewhat unlikely ■ Very likely ■ Somewhat likely

16. How likely would you be to consider moving to Saskatchewan if you wanted to retire to another province/ if the right career opportunity came along?

Base: All respondents, n = 852.

Younger individuals are more likely to consider moving to Saskatchewan.

Likelihood to Move to Saskatchewan by Age



16. How likely would you be to consider moving to Saskatchewan if you wanted to retire to another province/ if the right career opportunity came along?

Base: All respondents, n = 852.