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North Coast Aquaculture/Salmon Farming Survey

Prepared for Northwest Institute

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 Questionnaire

RESEARCH OBJECTIVES & METHODOLOGY

Objectives

- In March 2005, IMPACS commissioned a baseline survey of adult residents in three provincial ridings in Northw est BC: Bulkley Valley-Stikine, North Coast and Skeena. The survey objectives w ere as follow s:
 - To determine environmental and natural resources issues that concern residents
 - To measure levels of aw areness and familiarity of aquaculture/salmon farming issues and developments
 - To determine levels of support or opposition for aquaculture
 - To determine the perceived benefits and concerns pertaining to salmon farming/aquaculture in the North Coast
 - To determine w hich approach (expansion of salmon farms versus a moratorium on new salmon farms) is preferred by residents and how this impacts their voting intent
- In 2007, the Northw est Institute for Bioregional Research, a not-for-profit organization dedicated to the social and ecological sustainability in Northw estern BC, commissioned Synovate, a professional market research firm to conduct a follow up survey to track the results and to determine current aw areness levels and opinion tow ard the salmon farming approach.

Methodology

- For this poll a stratified sample of 600 telephone interview s w as conducted w ith adult residents of the same three ridings. 200 surveys w ere conducted in each riding of Bulkey-Valley-Stikine, North Coast and Skeena. All interview ing for the 2007 study w as completed in Vancouver from March 1 to 7, 2007.
- From each randomly selected household, interview s w ere completed w ith the adult at home aged 18 years and older w ho had the most recent birthday.
- Interview ing quotas w ere set by provincial riding and during data tabulation, mathematical w eights for age and gender w ere applied to the entire sample of 600 to ensure it w as an accurate representation of the region.
- The margins of error at the 95% confidence level associated w ith this poll are +/-4% for the total sample of 600. Margins of error for regional and demographic sub-samples are w ider e.g. the margin of error for each riding of 200 is +/-6.9, 19 times out of 20. When comparing the results betw een 2005 and 2007 on the total samples of 600, a difference of six percentage points is required to be statistically significant at the 95% confidence level.

EXECUTIVE SUMMARY

Environmental & Natural Resource Concerns

- The top environmental and natural resource issues that most concern Northwest BC residents are global warming and climate change (12% mention), pine beetles (10%), air pollution (8%) and the economic/job impacts of the natural resource sector including fisheries, forestry and mining (8%). Climate change/global warming has come to the forefront as an issue over the past two years ago, displacing forestry/deforestation and aquaculture.
- By riding, pine beetles are by far the most concerning issue in Bulkley Valley-Stikine. In the North Coast riding, salmon are a central issue with 13% bringing up wild salmon/fisheries and a further 9% concerned about fish farms. Skeena riding residents are most concerned with pollution related issues including global warming, air and water pollution as well as with job/economic and hydroelectric issues.

Awareness Of Salmon Aquaculture & Proposed Farms

- Eight-in-ten Northwest BC residents are aware of salmon aquaculture, including one-quarter who say they heard a lot about it over the past few months. North Coast riding residents are significantly more likely to have heard a lot about salmon aquaculture (34% versus 20% in Bulkley-Stikine and 24% in Skeena).
- One-half are aware of the proposed Atlantic salmon farms near the mouth of the Skeena River (including 14% who have heard a lot about them). Overall awareness of the proposed salmon farms has increased over the past two years from 38% to 49%, and those saying they heard a lot has doubled from 7% to 14%.

Opinion On Salmon Farming

- The majority of Northwest BC residents (71%) are opposed to open-net salmon farms on the North Coast, including 57% who are vehemently opposed. Support for the practice stands at 16% (including 7% in strong support). This is generally consistent with 2005. Strong opposition to open-net salmon farms increases to two-thirds in the North Coast riding.

Perceived Benefits Of Salmon Farming

- Compared to two years ago, fewer residents say that increased job opportunities, more economic investment and more wild salmon for recreational fishermen are benefits. In fact, with the exception of increased education and training opportunities, residents are more apt to say each of the other possible benefits will not likely happen or the opposite may occur. Mentions of perceived benefits range from 60% for increased job opportunities (mostly seen as a minor benefit) to 41% for less pressure on wild salmon stocks.

Perceived Drawbacks Of Salmon Farming

- The vast majority of Northwest BC residents continue to be concerned about all the possible negative outcomes of the proposed new Atlantic salmon fish farms near the mouth of the Skeena, with broadly nine-in-ten citing disease and sea lice infestations, ongoing antibiotic use, high volumes of untreated salmon farm effluent, Atlantic salmon escaping and breeding with wild salmon, and diversion of limited government resources from wild salmon conservation to promoting salmon farms as concerns. Residents continue to express their strongest concerns about disease and sea lice infestations (81% call it a major concern) and ongoing use of antibiotics (75% call it a major concern).

EXECUTIVE SUMMARY

Communication Points: Aquaculture's Positive & Negative Impacts

- In line with 2005, the majority of Northwest BC residents disagree with the positive impacts of salmon farming and agree with the negative impacts as follows:

Negative Impacts

- Sea lice infestations are a threat to wild salmon as pine beetles are to forests (77% agree; 58% strongly agree)
- The West Coast salmon resource is at risk due to government mismanagement (78% agree; 52% strongly agree)
- The government risks the total collapse of the wild salmon stock by allowing open-net salmon farms near the Skeena River (73% agree; 51% strongly agree)

Positive Impacts

- developing a viable salmon farming industry in the North is a necessary part of our economic future (63% disagree; 47% strongly disagree)
 - criticisms of salmon farming are outdated due to new environmental-friendly technologies (53% disagree; 34% strongly disagree)
 - Opinion on there not being enough scientific evidence of ecological and health risks to warrant banning open-net salmon farming on the BC Coast is more divided (42% agree and 47% disagree). However, 31% are in strong disagreement versus 21% in strong agreement.
- Close to six-in-ten Northwest BC residents believe that salmon farming on the North Coast will have a negative impact on the commercial and recreational fishing industries and the communities they live in. At least one-third believe that the impact will be very negative. Just over one-half feel that the tourism industry will be negatively impacted, with the proportion saying it will have a positive impact dropping (from 35% in 2005 to 28% currently).
 - **Significantly more residents now believe the salmon farming will have a negative impact on the community they live in compared to two years ago (57% say it will have a negative impact versus 49% in 2005, with very negative mentions increasing from 27% to 34%). North Coast riding residents are the most likely to hold this view.**

Expanding Salmon Farms Or Reinstating The Moratorium

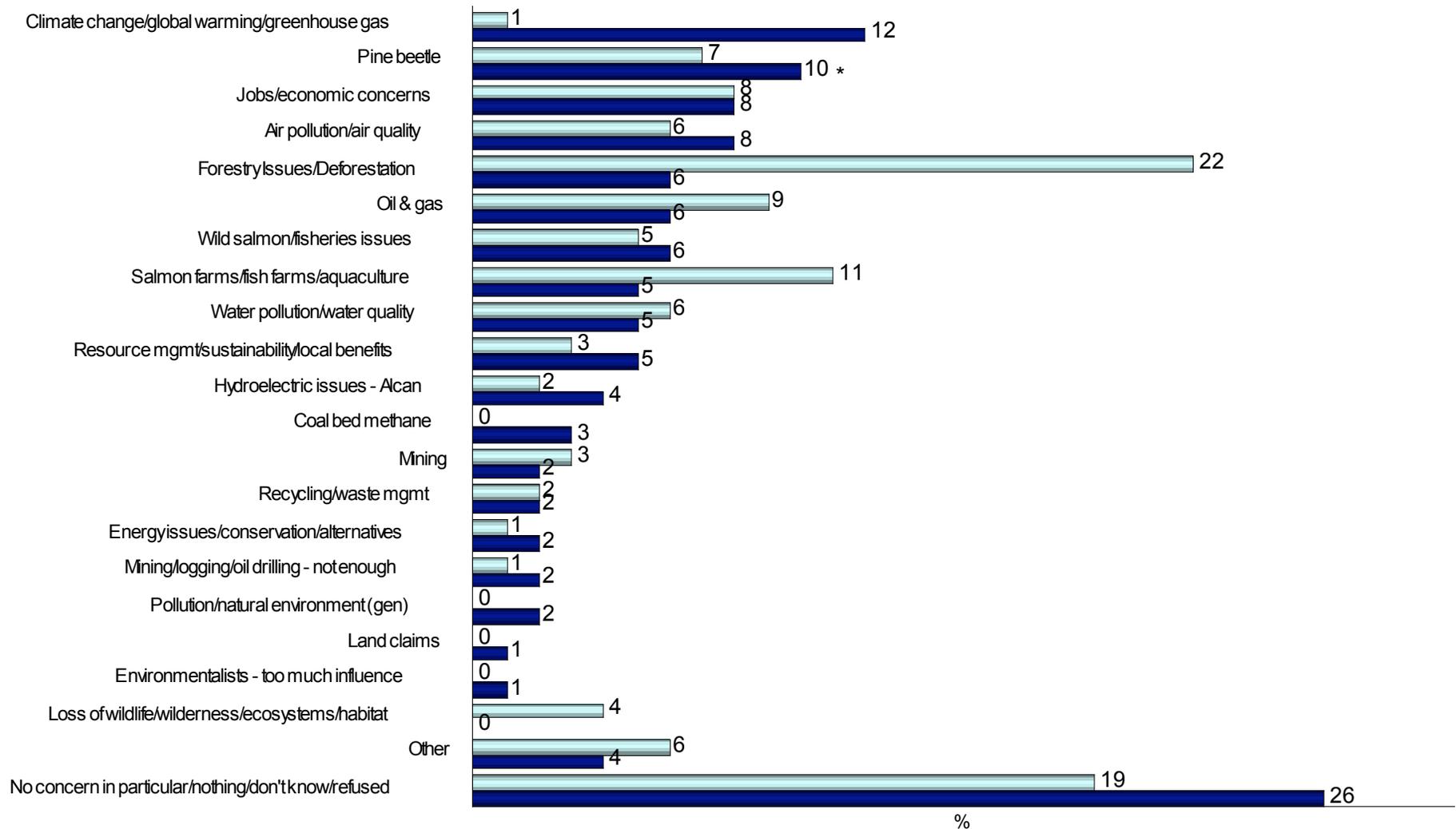
- Unchanged from 2005, the majority of Northwest BC residents support reinstating the NDP moratorium on new farms over the Liberal approach of expanding salmon farms in BC coastal waters. Specifically two-thirds support the moratorium while 16% support the expansion of the fish farms. North Coast and Skeena riding residents are significantly more likely to support the moratorium than their counterparts in Bulkley Valley-Stikine (74% and 71% support for the moratorium versus 56% respectively). Support for the Liberal approach is highest in Bulkley Valley-Stikine (at 22%).

Voter Intentions

- Consistent with two years ago, 86% of residents in Northwest BC indicate that they intend to vote in the next provincial election with seven-in-ten saying they definitely will vote. Likelihood of voting is equal across all three ridings. The voting intent also mirrors that of 2005 with 48% intending to vote for the NDP, 37% for the Liberals, 7% for the Green Party and 6% for the Conservatives. In the North Coast riding, the NDP has a runaway lead over the Liberals (63% of the decided vote is for the NDP versus 25% for the BC Liberals), while the Liberals are slightly ahead in Bulkley Valley-Stikine (47% versus 35% for the NDP). In the Skeena riding, the race is much closer with the NDP garnering 46% of the decided vote and the Liberals 39%.
- Northwest BC residents' vote is likely to be influenced by their candidates' stand on open-net salmon fish farms, especially in the North Coast riding. 72% of all Northwest BC residents and 75% of those in the North Coast riding say they are less likely to vote for the candidate who endorses the farms.

Main Environmental/Natural Resource Issues

Q3. Now, when you think of the various environment and natural resource issues affecting the region in which you live today, what one issue concerns you most?



*Includes 3% who said job loss due to pine beetle infestation concerns them most.

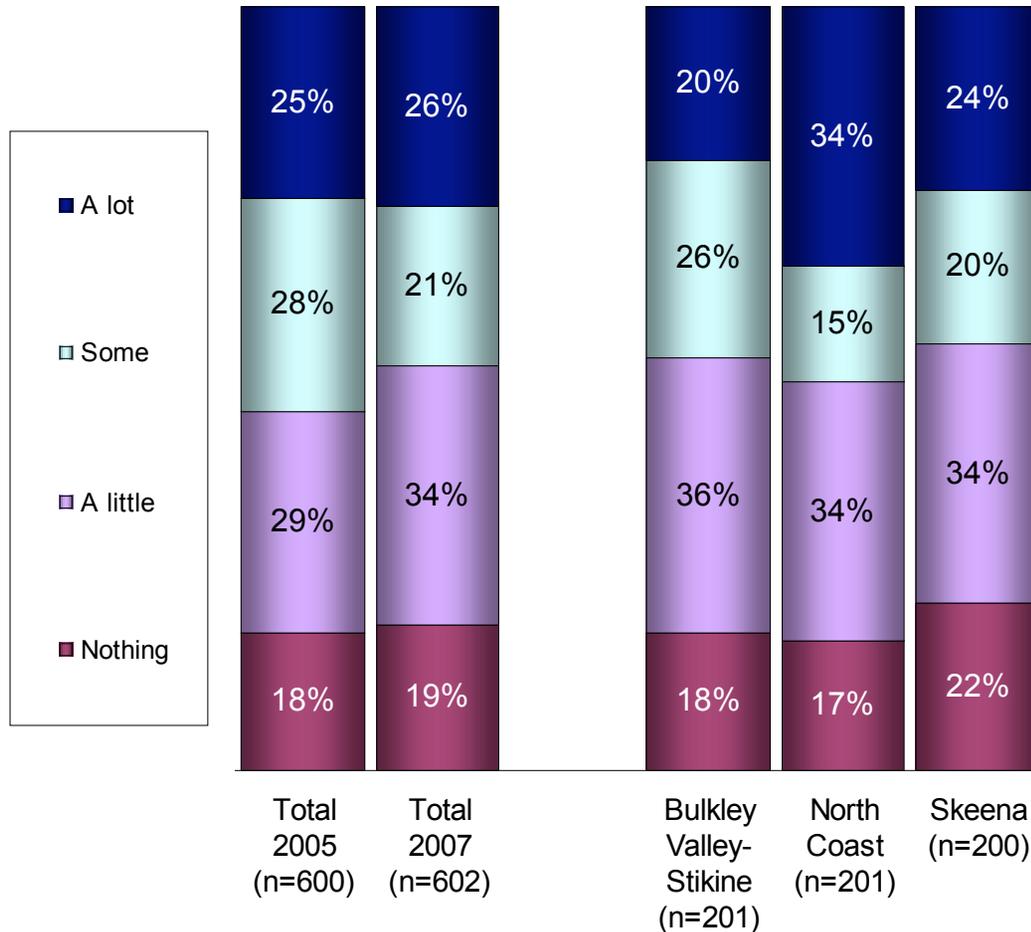
2005 (n=600) 2007 (n=602)

Main Environmental/Natural Resource Issues

- The main environmental and natural resource issues that concern Northwest BC residents are global warming and climate change (12%), the pine beetle infestation (10%), economic/job concerns in various natural resource sectors (8%), air pollution (8%), forestry issues/deforestation (6%), oil and gas (6%) and wild salmon/fisheries (6%). A further 5% each mention aquaculture, water pollution and resource management/sustainability as concerns. However, one-quarter of residents could not volunteer any particular concern.
- Compared to two years ago, fewer mentions are received for forestry issues/deforestation and aquaculture. Conversely, climate control/global warming has increasingly become a major concern.
- The top concerns by provincial riding are:
 - Bulkley Valley-Stikine
 - Pine beetles (21%, including 7% mention of job loss as a result of the pine beetle infestation)
 - Climate change/global warming/greenhouse gases (11%)
 - Coal bed methane (9%)
 - Jobs/economic concerns (9%)
 - North Coast
 - Wild salmon/fisheries issues (13%)
 - Oil and gas (12%)
 - Climate change/global warming/greenhouse gases (12%)
 - Forestry issues/deforestation (9%)
 - Salmon farms/fish farms/aquaculture (9%)
 - Pine beetles (9%, including 3% mention of job loss as a result of the pine beetle infestation)
 - Skeena
 - Climate change/global warming/greenhouse gases (12%)
 - Air pollution/air quality (9%)
 - Jobs/economic concerns (8%)
 - Water pollution/water quality (8%)
 - Hydroelectric issues/Alcan (8%)

Level Of Awareness Of Aquaculture

Q4. Over the past few months, would you say that you have heard a lot, some, a little or nothing about the issue of salmon farming, also referred to as salmon aquaculture?

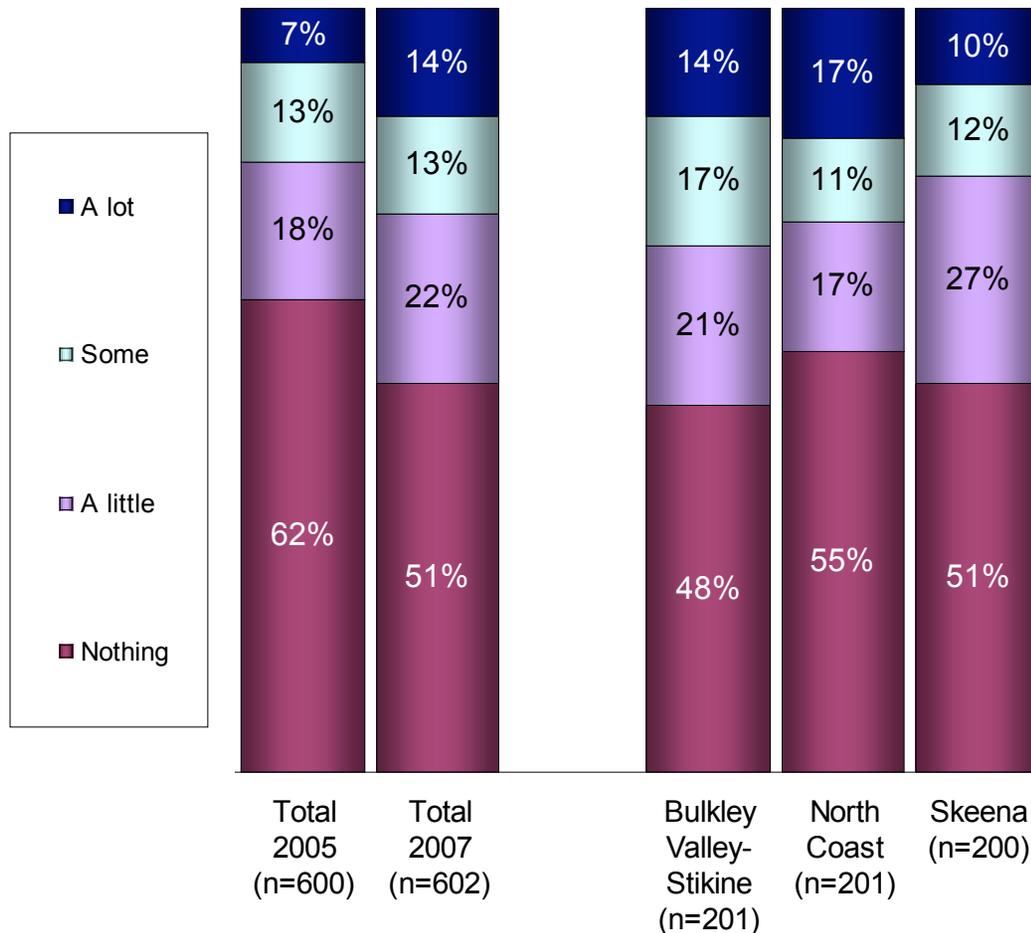


- Provincial Riding 2007 -

- The proportion of Northwest residents who heard at least something about salmon farming over the past few months is unchanged from two years ago, at 81%. This includes 26% who heard a lot, 21% who heard some and 34% who heard a little. Also comparable to 2005, 19% claim to have heard nothing about the issue.
- North Coast riding residents are more apt to say they heard a lot about the issue (34% compared to 20% of Bulkley Valley-Stikine riding residents and 24% of Skeena riding residents), whereas those in the other two ridings were more likely to say they heard “some” information or news.
- Residents who intend to vote for the NDP are most apt to have heard a lot about aquaculture, while likely Green Party voters tend mostly to have heard a little about it.
- Younger Northwest BC residents (aged 18 to 34) are most apt to be unfamiliar with the aquaculture issue (28% heard nothing about it versus 14% of those 35 or older).
- Opponents of open-net salmon farming are more likely to have heard a lot about the practice, while supporters tend to have heard a little or nothing about it.

Level Of Awareness Of Proposed Salmon Farms

Q5. As you may know, Pan Fish, an international company, is proposing to build three Atlantic salmon, open-net fish farms near the mouth of the Skeena River. Before today, how much if anything, have you heard about these proposed salmon farms?

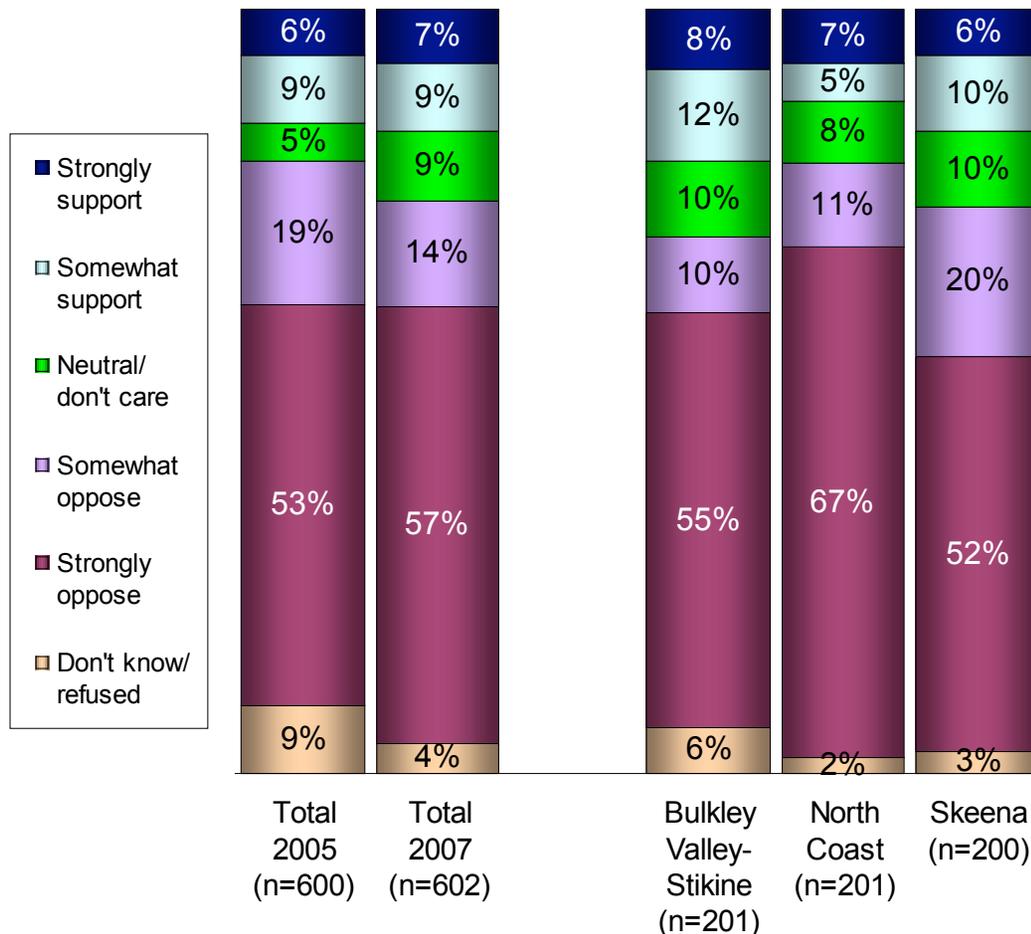


- Provincial Riding 2007 -

- Overall, just under one-half of Northwest BC residents heard something about the three salmon farms proposed by Pan Fish, including 14% who heard a lot, 13% who heard “some” and 22% who heard a little. This is an increase from the 38% who heard at least a little about it two years ago.
- Compared to 2005, those saying they heard a lot doubled from 7% to 14%, while the proportion who heard nothing decreased from 62% to 51%.
- There are no marked differences in awareness levels by riding.
- Women (57%) and those aged 18 to 34 (65%) are more likely to have heard nothing about the proposed salmon farms.

Opinion On Allowing Open-Net Salmon Farms

Q6. Some people say that allowing open-net salmon farms on the North Coast will benefit Northerners due to the economic benefits offered. Others say that open-net salmon farms should not be allowed because of the risks they pose to wild salmon that spawn in the Skeena. Based on what you currently know, would you say you support or oppose allowing open-net salmon farms on the North Coast? Would that be strongly or somewhat (support/oppose)?

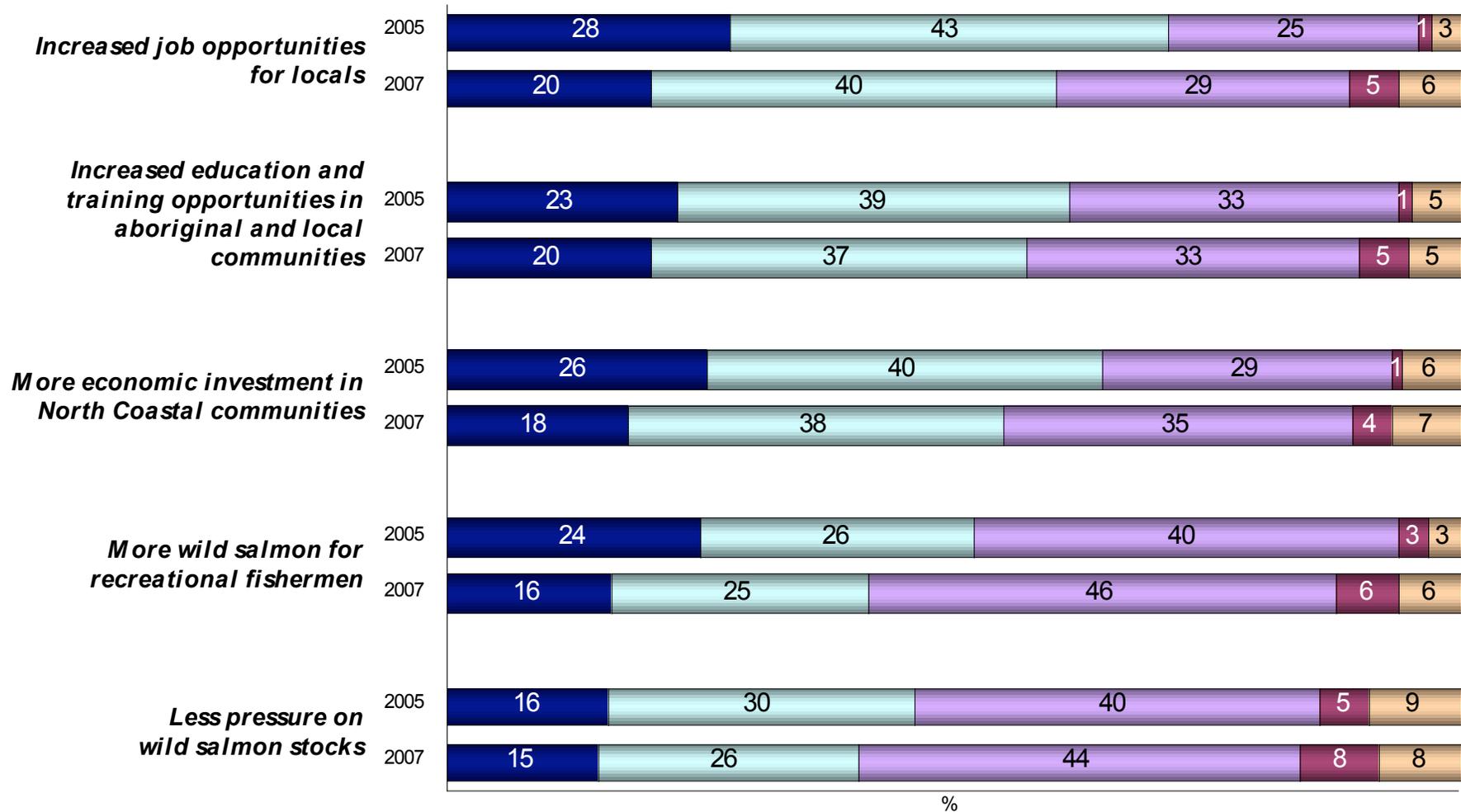


- The majority of Northwest BC residents are opposed to open-net salmon farming on the North Coast (71%), including 57% who are strongly opposed and 14% who are somewhat opposed. Only 16% support the practice on the North Coast (7% strongly and 9% somewhat). This leaves 9% who are neutral and 4% who do not have an opinion.
- The opinion on open-net salmon farming is fairly consistent with two years ago.
- North Coast riding residents are most vehemently opposed to the open net salmon farms – two-thirds are strongly opposed versus 55% of those in Bulkley Valley-Stikine and 52% in Skeena. Skeena riding residents in turn are more apt to be somewhat opposed (20% versus one-in-ten in each of the Bulkley Valley-Stikine and the North Coast).
- Strong opposition to the practice on the North Coast is higher among NDP and Green Party voters, men, rural residents and recreational salmon fishers. Interestingly, men are also more apt to strongly support open-net salmon farming in the region (9% versus 4% of women).
- BC Liberal voters are most supportive of the practice (25% support versus 7% of NDP voters).

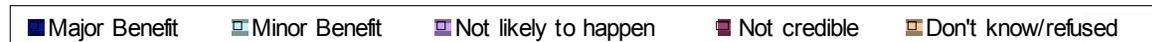
- Provincial Riding 2007 -

Perceived Benefits Of Salmon Farming

Q7. Some people have suggested that allowing salmon farming on the North Coast will result in the following benefits. Please tell me whether you personally consider each one to be a major benefit, minor benefit or not likely to happen.



2005 n=600
2007 n=602



Perceived Benefits Of Salmon Farming

- Compared to 2005, fewer residents currently believe that increased job opportunities for locals, more economic investment in North Coastal communities and more wild salmon for recreational fishermen will result by allowing salmon farming on the North Coast to occur, and correspondingly, more are of the opinion that these benefits are not likely to occur or that they are non-credible statements as the reverse will occur. More also believe that there will be more pressure on wild salmon stocks as a result of the aquaculture farms.
- Opinion on whether increased education and training and opportunities in aboriginal and local communities will be a benefit is comparable to that of 2005.
- Of the 5 possible benefits of salmon farming on the North Coast, Northwest BC residents believe the greatest benefits are increased job opportunities for locals (60% say this is a benefit), increased education and training opportunities in aboriginal and local communities (57%), and more investment in North Coast communities (56%), followed by more wild salmon for recreational fishermen (41%) and less pressure on wild salmon stocks (41%). However, residents see these benefits as minor rather than major.
- Northwest BC residents are more inclined to be skeptical that more wild salmon for recreational fishermen and less pressure on wild salmon stocks is a benefit, with over one-half of the opinion that these benefits are not likely to happen or lack credibility (i.e. that the opposite may occur).

Perceived Benefits Of Salmon Farming

Q7. Some people have suggested that allowing salmon farming on the North Coast will result in the following benefits. Please tell me whether you personally consider each one to be a major benefit, minor benefit or not likely to happen.

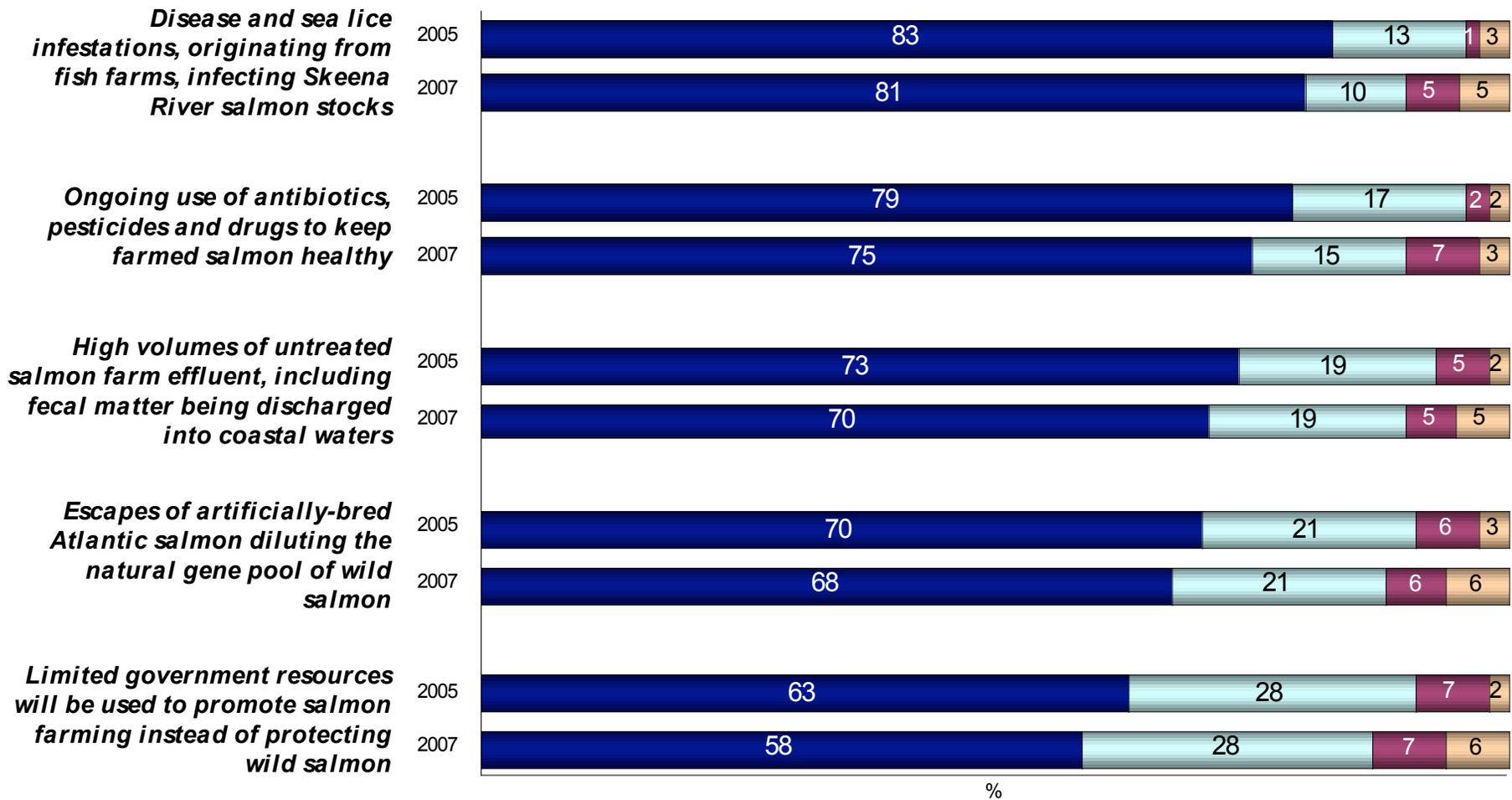
| | | | Major Benefit | Minor Benefit | Not Likely To Happen | Not Credible | Don't Know/ Refused |
|---|---|--|---------------|---------------|----------------------|--------------|---------------------|
| Increased job opportunities for locals | | | | | | | |
| Bulkey Valley-Stikine (n=201) | % | | 26 | 36 | 27 | 5 | 6 |
| North Coast (n=201) | % | | 18 | 38 | 35 | 5 | 4 |
| Skeena (n=200) | % | | 16 | 46 | 26 | 5 | 6 |
| Increased education and training opportunities in aboriginal and local communities | | | | | | | |
| Bulkey Valley-Stikine (n=201) | % | | 23 | 36 | 34 | 3 | 6 |
| North Coast (n=201) | % | | 18 | 35 | 38 | 5 | 4 |
| Skeena (n=200) | % | | 21 | 39 | 27 | 6 | 7 |
| More economic investment in North Coastal communities | | | | | | | |
| Bulkey Valley-Stikine (n=201) | % | | 21 | 38 | 32 | 3 | 5 |
| North Coast (n=201) | % | | 13 | 37 | 41 | 6 | 3 |
| Skeena (n=200) | % | | 19 | 39 | 33 | 3 | 6 |
| More wild salmon for recreational fishermen | | | | | | | |
| Bulkey Valley-Stikine (n=201) | % | | 24 | 24 | 39 | 6 | 7 |
| North Coast (n=201) | % | | 10 | 22 | 56 | 7 | 6 |
| Skeena (n=200) | % | | 13 | 29 | 44 | 6 | 9 |
| Less pressure on wild salmon stocks | | | | | | | |
| Bulkey Valley-Stikine (n=201) | % | | 16 | 28 | 38 | 8 | 10 |
| North Coast (n=201) | % | | 15 | 24 | 47 | 11 | 4 |
| Skeena (n=200) | % | | 12 | 27 | 47 | 6 | 8 |

Perceived Benefits Of Salmon Farming

- Bulkley Valley-Stikine riding residents are more likely to consider increased jobs opportunities for locals (26% versus 20% among all ridings) and more wild salmon for recreational fishermen (24% versus 16% among all ridings) as a major benefit.
- In contrast, North Coast riding residents are least likely to view more wild salmon for recreational fisherman as a benefit of allowing salmon farming on the North Coast, with 56% saying that it is not likely to happen.
- Residents who intend to vote for the BC Liberals are more apt to believe increased job opportunities for locals and more economic investment in North Coastal communities will occur as a result of allowing salmon farming, while those who intend to vote NDP are more likely to believe that it is unlikely that there will be more wild salmon for recreational fishermen and less pressure on wild salmon stocks. Green Party voters tend to feel that salmon farming will not bring economic investment to North Coastal communities.
- Recreational salmon fishers are significantly more likely to agree that “less pressure on wild salmon stocks” and “more wild salmon for recreational fishermen” will not likely happen

Perceived Drawbacks Of Salmon Farming

Q8. Some people have raised the following concerns about the proposed new Atlantic salmon fish farms near the mouth of the Skeena River. Please tell me whether you personally consider each one to be a major concern, minor concern or not a concern at all.



2005 n=600
2007 n=602



Perceived Drawbacks Of Salmon Farming

- Northwest BC residents are concerned about all five of the possible repercussions of the proposed salmon fish farms near the mouth of the Skeena River. Broadly nine-in-ten residents say that each outcome is at least a minor concern.
- Of the concerns, disease and sea lice infestations originating from the fish farms is seen as the largest concern (81% mention this as a major concern), followed by the ongoing use of antibiotics, pesticides and drugs to keep the farmed salmon healthy (75%) and high volumes of untreated salmon farm effluent and artificially-bred Atlantic salmon escaping and mating with wild salmon (each mentioned as a major concern by seven-in-ten residents). 58% view the diversion of limited government resources from conservation of wild salmon to promoting salmon farms as a major concern.
- Over the past two years fewer Northwest BC residents perceive disease and sea lice infestations from the farms infecting local stock (91% versus 96% in 2005), ongoing use of antibiotics on farmed salmon (90% versus 96% in 2005) and the diverting of limited government resources (86% versus 91% in 2005) as concerns.

Perceived Drawbacks Of Salmon Farming

Q8. Some people have raised the following concerns about the proposed new Atlantic salmon fish farms near the mouth of the Skeena River. Please tell me whether you personally consider each one to be a major concern, minor concern or not a concern at all.

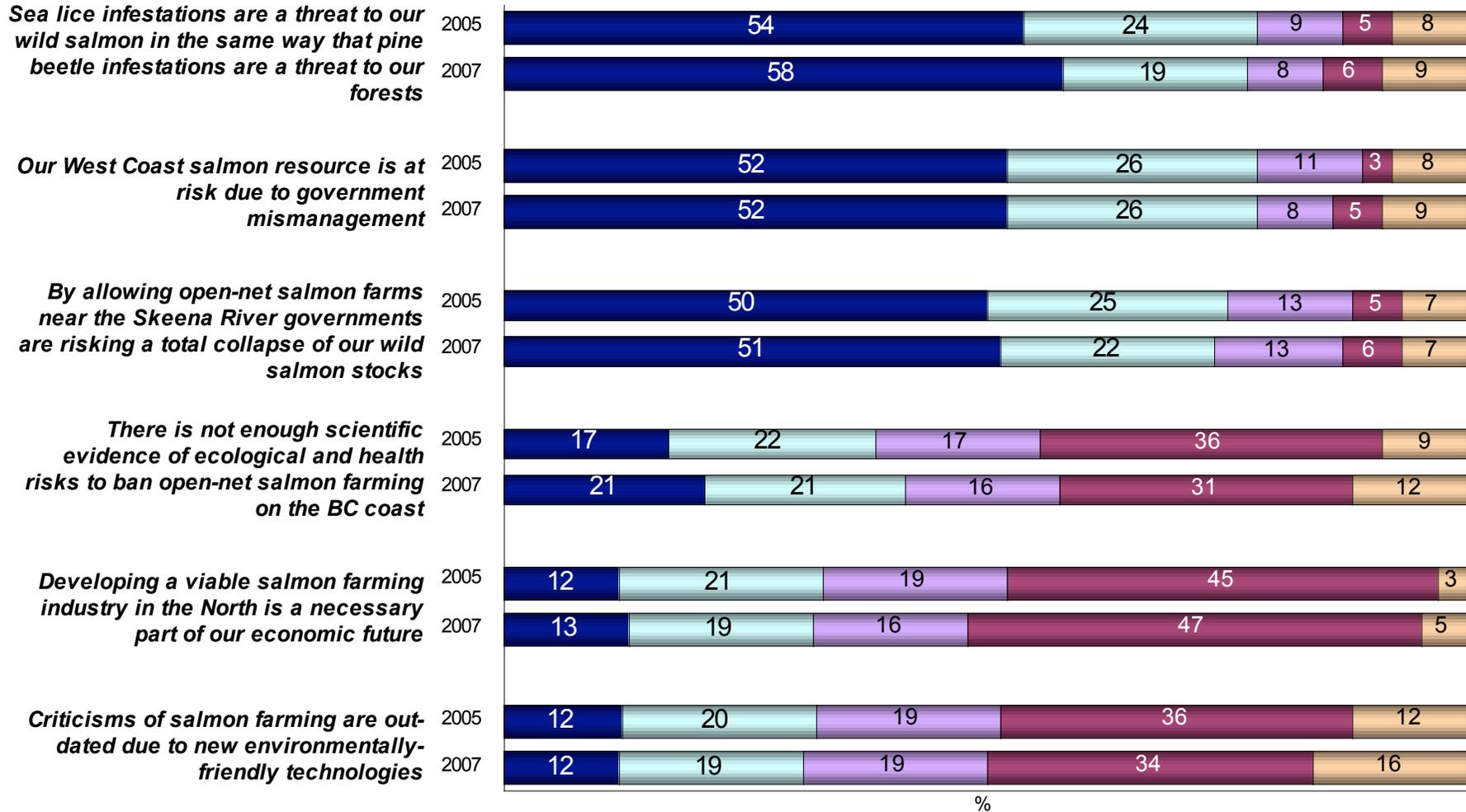
| | | | Major Concern | Minor Concern | Not A Concern At All | Don't Know/ Refused |
|---|--------------------------------|---|------------------|------------------|-------------------------|------------------------|
| <i>Disease and sea lice infestations, originating from fish farms, infecting Skeena River salmon stocks</i> | | | | | | |
| | Bulkley Valley-Stikine (n=201) | % | 81 | 10 | 4 | 5 |
| | North Coast (n=201) | % | 80 | 9 | 9 | 2 |
| | Skeena (n=200) | % | 81 | 10 | 2 | 6 |
| <i>Ongoing use of antibiotics, pesticides and drugs to keep farmed salmon healthy</i> | | | | | | |
| | Bulkley Valley-Stikine (n=201) | % | 77 | 17 | 4 | 2 |
| | North Coast (n=201) | % | 77 | 11 | 9 | 3 |
| | Skeena (n=200) | % | 73 | 16 | 7 | 5 |
| <i>High volumes of untreated salmon farm effluent, including fecal matter being discharged into coastal waters</i> | | | | | | |
| | Bulkley Valley-Stikine (n=201) | % | 68 | 21 | 5 | 6 |
| | North Coast (n=201) | % | 69 | 17 | 9 | 5 |
| | Skeena (n=200) | % | 72 | 20 | 3 | 5 |
| <i>Escapes of artificially-bred Atlantic salmon diluting the natural gene pool of wild salmon</i> | | | | | | |
| | Bulkley Valley-Stikine (n=201) | % | 63 | 31 | 2 | 4 |
| | North Coast (n=201) | % | 71 | 15 | 10 | 4 |
| | Skeena (n=200) | % | 69 | 18 | 5 | 9 |
| <i>Limited government resources will be used to promote salmon farming instead of protecting wild salmon</i> | | | | | | |
| | Bulkley Valley-Stikine (n=201) | % | 59 | 29 | 7 | 5 |
| | North Coast (n=201) | % | 61 | 25 | 9 | 4 |
| | Skeena (n=200) | % | 56 | 29 | 5 | 9 |

Perceived Drawbacks Of Salmon Farming

- Residents in the three Northw estern BC ridings have similar levels of concern about the negative impacts of salmon farming.
- The majority of residents in all three ridings express major concern on all five of the possible negative impacts.

Communication Points

Q9. Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements.



2005 n=600
2007 n=602

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree ■ Don't know/refused

%

Communication Points

- Northw estern BC residents w ere read six statements (three positive and three negative) relating to fish farming and management of w ild salmon stock. The majority agree w ith the follow ing three potential negative impacts of salmon farming, namely:
 - *“Sea lice infestations are a threat to our wild salmon in the same way pine beetle infestations are a threat to our forests” (77% agree)*
 - *“Our West Coast salmon resource is at risk due to government mismanagement” (78% agree)*
 - *“By allowing open-net salmon farms near the Skeena River, governments are risking a total collapse of our wild salmon stocks” (73% agree)*
- Conversely, more residents disagree w ith the positive statements of salmon farming, namely:
 - *Developing a viable salmon farming industry in the North is a necessary part of our economic future (63% disagree)*
 - *Criticisms of salmon farming are out-dated due to new environmentally–friendly technologies (53% disagree)*
- The opinion on there not being enough scientific evidence of ecological and health risks to ban open-net salmon farming on the BC Coast is more polarized, w ith 42% agreeing w ith this statement and 47% disagreeing w ith it. How ever, significantly more strongly disagree (31%) w ith the statement than strongly agree (21%) w ith it.
- These findings are in-line w ith those of 2005.

Communication Points

Q9. Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements.

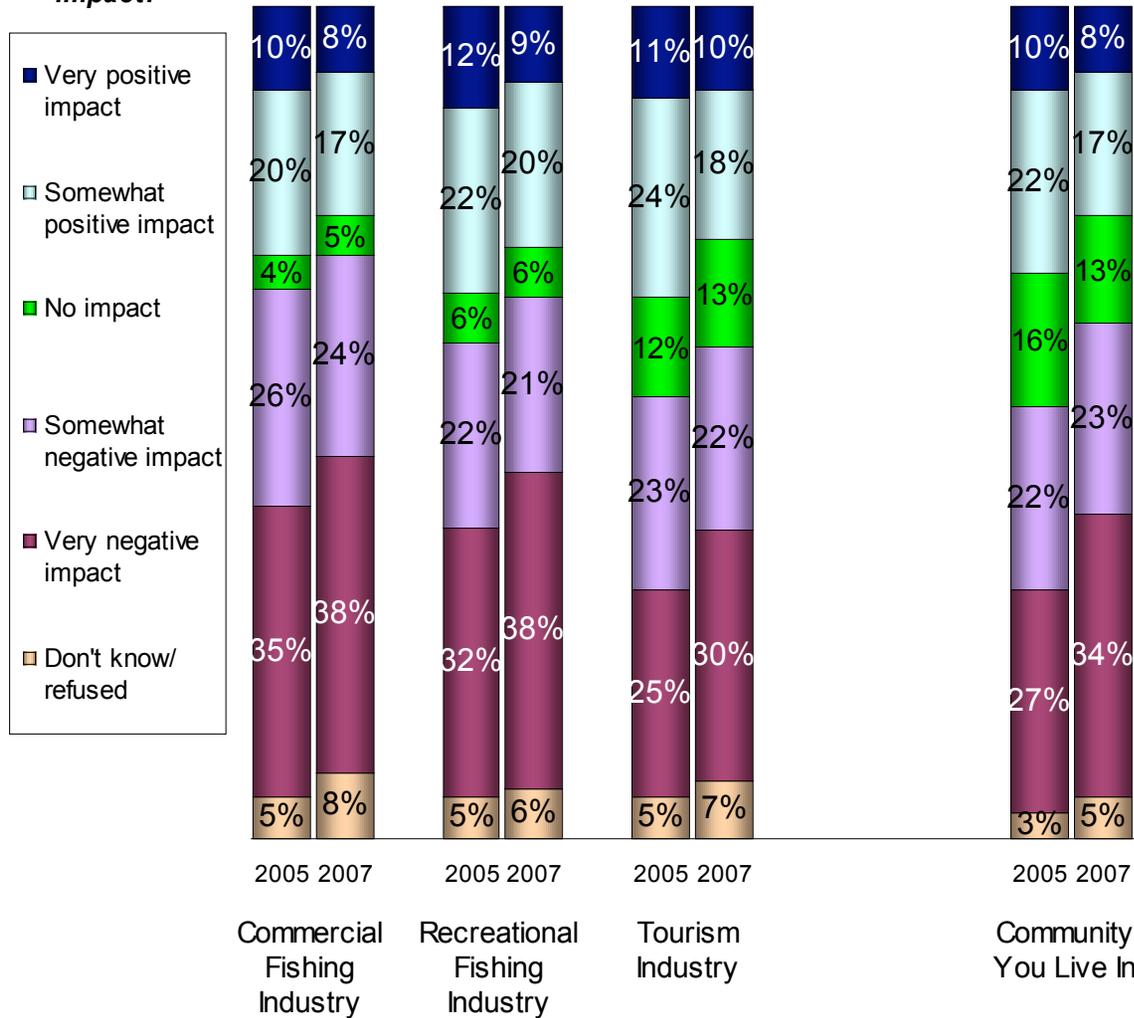
| | | | Strongly Agree | Somewhat Agree | Somewhat Disagree | Strongly Disagree | Don't Know/ Refused |
|---|-------------------------------|---|----------------|----------------|-------------------|-------------------|------------------------|
| <i>Sea lice infestations are a threat to our wild salmon in the same way that pine beetle infestations are a threat to our forests</i> | | | | | | | |
| | Bulkey Valley-Stikine (n=201) | % | 56 | 22 | 9 | 5 | 8 |
| | North Coast (n=201) | % | 65 | 16 | 6 | 8 | 5 |
| | Skeena (n=200) | % | 53 | 18 | 11 | 4 | 14 |
| <i>Our West Coast salmon resource is at risk due to government mismanagement</i> | | | | | | | |
| | Bulkey Valley-Stikine (n=201) | % | 47 | 27 | 11 | 7 | 8 |
| | North Coast (n=201) | % | 63 | 20 | 5 | 5 | 7 |
| | Skeena (n=200) | % | 48 | 29 | 8 | 3 | 11 |
| <i>By allowing open-net salmon farms near the Skeena River governments are risking a total collapse of our wild salmon stocks</i> | | | | | | | |
| | Bulkey Valley-Stikine (n=201) | % | 49 | 23 | 14 | 9 | 6 |
| | North Coast (n=201) | % | 59 | 17 | 12 | 7 | 5 |
| | Skeena (n=200) | % | 47 | 27 | 15 | 3 | 9 |
| <i>There is not enough scientific evidence of ecological and health risks to ban open-net salmon farming on the BC coast</i> | | | | | | | |
| | Bulkey Valley-Stikine (n=201) | % | 22 | 23 | 18 | 28 | 9 |
| | North Coast (n=201) | % | 19 | 20 | 16 | 38 | 8 |
| | Skeena (n=200) | % | 22 | 19 | 14 | 29 | 17 |
| <i>Developing a viable salmon farming industry in the North is a necessary part of our economic future</i> | | | | | | | |
| | Bulkey Valley-Stikine (n=201) | % | 18 | 17 | 14 | 47 | 4 |
| | North Coast (n=201) | % | 13 | 17 | 18 | 49 | 3 |
| | Skeena (n=200) | % | 8 | 23 | 16 | 46 | 7 |
| <i>Criticisms of salmon farming are out-dated due to new environmentally-friendly technologies</i> | | | | | | | |
| | Bulkey Valley-Stikine (n=201) | % | 14 | 18 | 20 | 29 | 19 |
| | North Coast (n=201) | % | 11 | 17 | 18 | 42 | 12 |
| | Skeena (n=200) | % | 10 | 22 | 18 | 32 | 17 |

Communication Points

- North Coast riding residents are the most likely to strongly agree that West Coast salmon stocks are at risk due to government mismanagement (63% strongly agree) and that the government is risking the total collapse of wild salmon stocks by allowing open-net salmon farms near the Skeena River (59% strongly agree). These residents are also most apt to be skeptical of the statement that criticisms of salmon farming are out-dated due to new environmental friendly developments (42% strongly disagree with this).
- Bulkley Valley-Stikine riding residents are most likely to disagree that the West Coast salmon resource is threatened by government mismanagement (18% disagree versus one-in-ten in other ridings).
- NDP supporters are most apt to strongly agree that the sea lice infestations pose a threat to the wild salmon, that the West Coast salmon resource is at risk due to government mismanagement and the government risks the total collapse of the wild salmon stock by allowing open-net salmon farms (two-thirds of these supporters strongly agree with each statement). These residents are also most apt to strongly disagree that developing a viable salmon farming industry in the North is essential for the region's economic future (60%) and that criticisms of salmon farming are outdated (45%).
- Green Party supporters also reject that criticisms of salmon farming are outdated and that there is not enough scientific evidence of the risks posed by open-net salmon farming to ban it (over one-half strongly disagree with each of these points).

Impact Of Salmon Farming On Industries & Community

Q11. Please tell me whether you feel that, in the long run, salmon farming in the North Coast, will have a positive or negative impact on each of the following, starting with (___)....? Would that be a very or somewhat (negative/positive) impact?



- A majority of Northwest BC residents believe that salmon farming will have a detrimental effect on the commercial fishing, recreational fishing and tourism industries and the community in which they reside in the long run.
- Compared to two years ago, more residents feel that there will be a negative impact on their community (from 49% to 57%)
- Fewer residents also say salmon farming will have a positive impact on the tourism industry.

2005 n=600
2007 n=602

Impact Of Salmon Farming On Industries & Community

Q11. Please tell me whether you feel that, in the long run, salmon farming in the North Coast, will have a positive or negative impact on each of the following, starting with (___)....? Would that be a very or somewhat (negative/positive) impact?

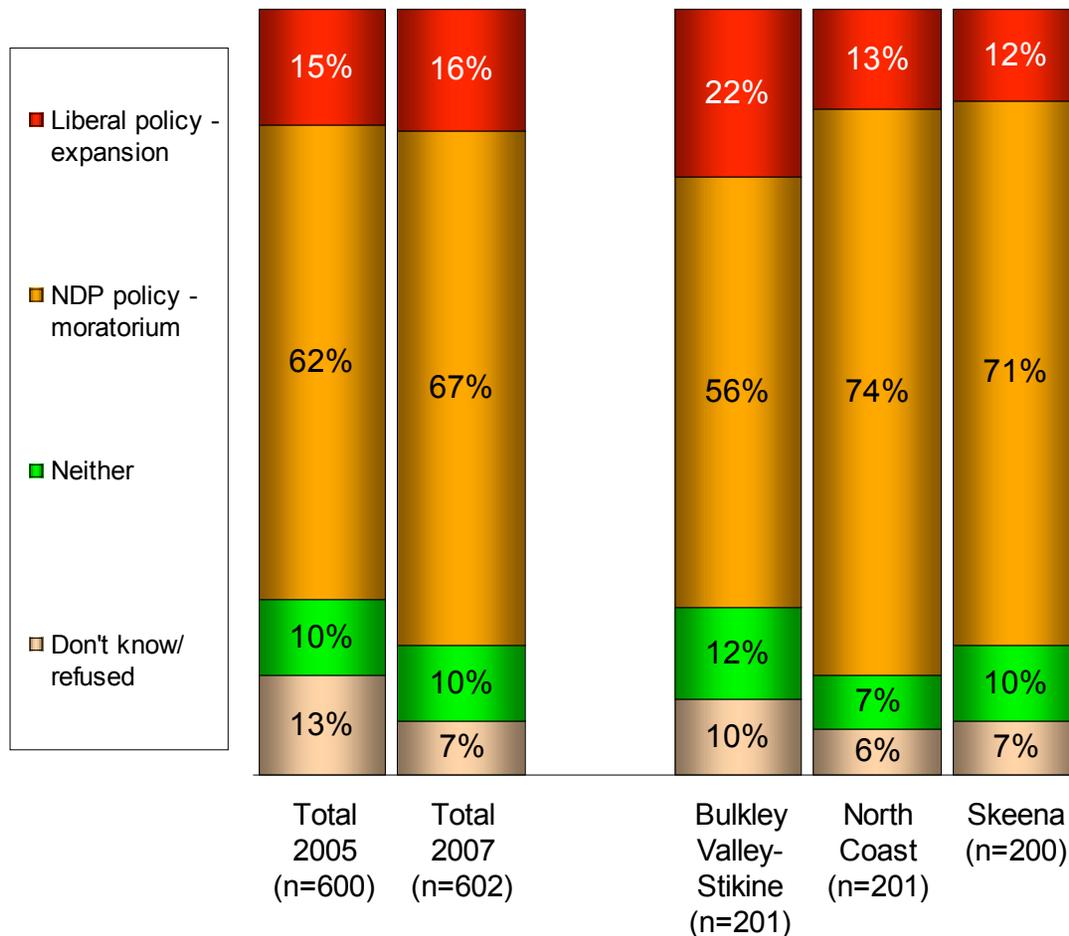
| | | Very Positive Impact | Somew hat Positive Impact | No Impact | Somewhat Negative Impact | Very Negative Impact | Don't Know/ Refused |
|--------------------------------------|---|----------------------|---------------------------|-----------|--------------------------|----------------------|---------------------|
| Commercial Fishing Industry | | | | | | | |
| Bulkey Valley-Stikine (n=201) | % | 10 | 21 | 5 | 23 | 33 | 7 |
| North Coast (n=201) | % | 9 | 9 | 8 | 21 | 46 | 7 |
| Skeena (n=200) | % | 6 | 21 | 3 | 26 | 34 | 10 |
| Recreational Fishing Industry | | | | | | | |
| Bulkey Valley-Stikine (n=201) | % | 14 | 19 | 5 | 17 | 38 | 7 |
| North Coast (n=201) | % | 6 | 19 | 7 | 23 | 40 | 5 |
| Skeena (n=200) | % | 6 | 21 | 6 | 24 | 37 | 6 |
| Community You Live In | | | | | | | |
| Bulkey Valley-Stikine (n=201) | % | 11 | 15 | 17 | 23 | 29 | 4 |
| North Coast (n=201) | % | 8 | 19 | 9 | 19 | 41 | 5 |
| Skeena (n=200) | % | 5 | 16 | 13 | 27 | 31 | 7 |
| Tourism Industry | | | | | | | |
| Bulkey Valley-Stikine (n=201) | % | 12 | 20 | 10 | 22 | 30 | 6 |
| North Coast (n=201) | % | 9 | 16 | 18 | 21 | 30 | 6 |
| Skeena (n=200) | % | 10 | 17 | 12 | 22 | 31 | 8 |

Impact Of Salmon Farming On Various Industries

- North Coast riding residents, in particular, are of the opinion that salmon farming in the North Coast will have a very negative impact on the commercial fishing (46% versus one-third of residents in the Bulkley Valley-Stikine and Skeena ridings) and community they live in (41% versus three-in-ten of residents in the Bulkley Valley-Stikine and Skeena ridings).
- Bulkley Valley-Stikine riding residents are more likely to believe that salmon farming in the North Coast will have a very positive impact on the recreational fishing industry in the long term (14% say this versus 6% in the North Coast and Skeena).
- Recreational salmon fishers are more pessimistic about the effects of the salmon farms overall, and believe that each of the industries will be very negatively impacted.

Preferred Approach: Expansion Vs. Moratorium

Q12. Gordon Campbell's Liberals have supported the expansion of salmon farms in B.C. coastal waters, after revoking a moratorium on new farms imposed by the NDP. Carole James' NDP say they would reinstate the moratorium on new salmon farms and encourage alternatives. In your opinion, which is the best approach?

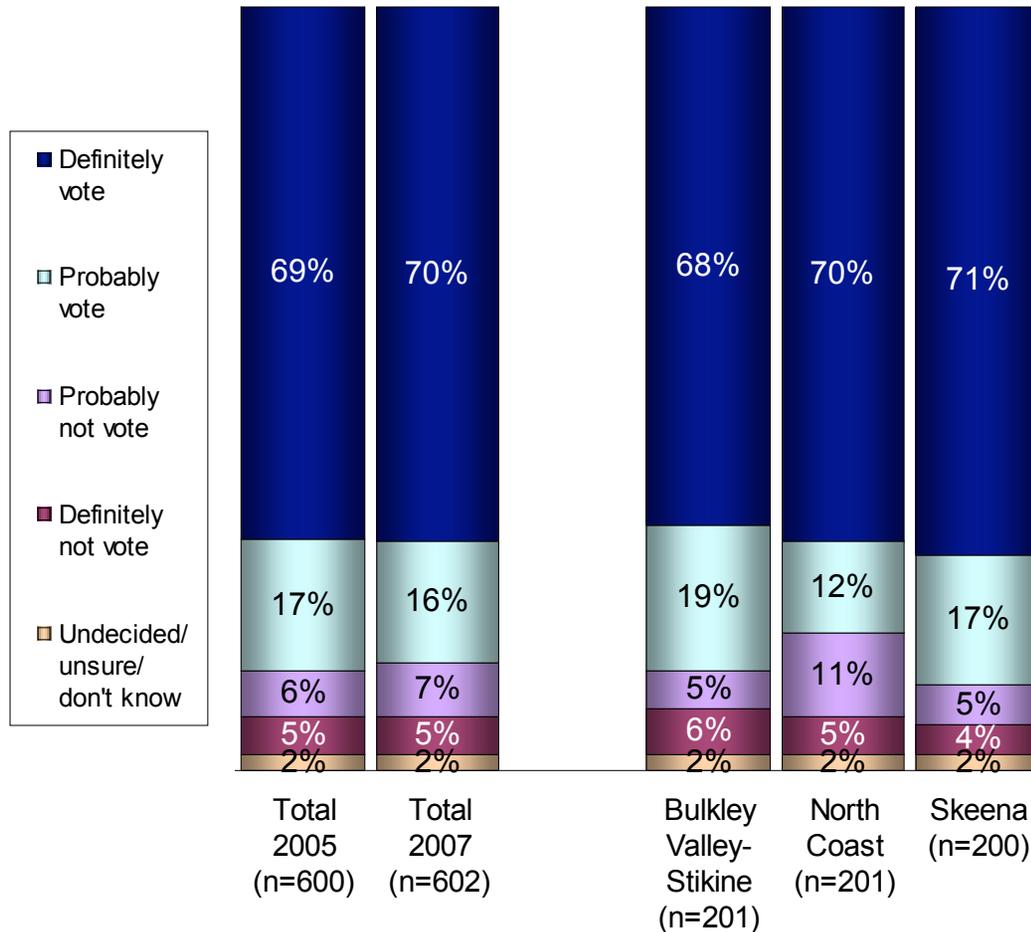


- Provincial Riding 2007 -

- The majority of Northwestern BC residents favour the NDP's moratorium on new salmon farms off BC coastal waters over the Liberal policy of expanding the salmon farms. Specifically, two thirds prefer the moratorium, while 16% support the expansion. This leaves one-in-ten who do not have a preference and 7% who are undecided.
- These findings are similar to two years ago. The only change is that residents now are more inclined to pick a side. Those who were undecided, dropped from 13% in 2005 to 7% currently, with the moratorium approach being the main benefactor of this change.
- NDP (88%) and Green (81%) Party supporters, North Coast (74%) and Skeena (71%) riding residents, First Nations residents (80%) and recreational salmon fishers (71%) are most likely to support the moratorium.
- Liberal supporters (34%), Bulkley-Valley-Stikine riding residents (22%) and non First Nations residents (18%) are more likely to support the expansion of the salmon farms off BC coastal waters.

Likelihood Of Voting

**Q1. How likely are you to vote in the next provincial general election?
Would you say you are going to definitely vote, probably vote, probably not vote or definitely not vote?**



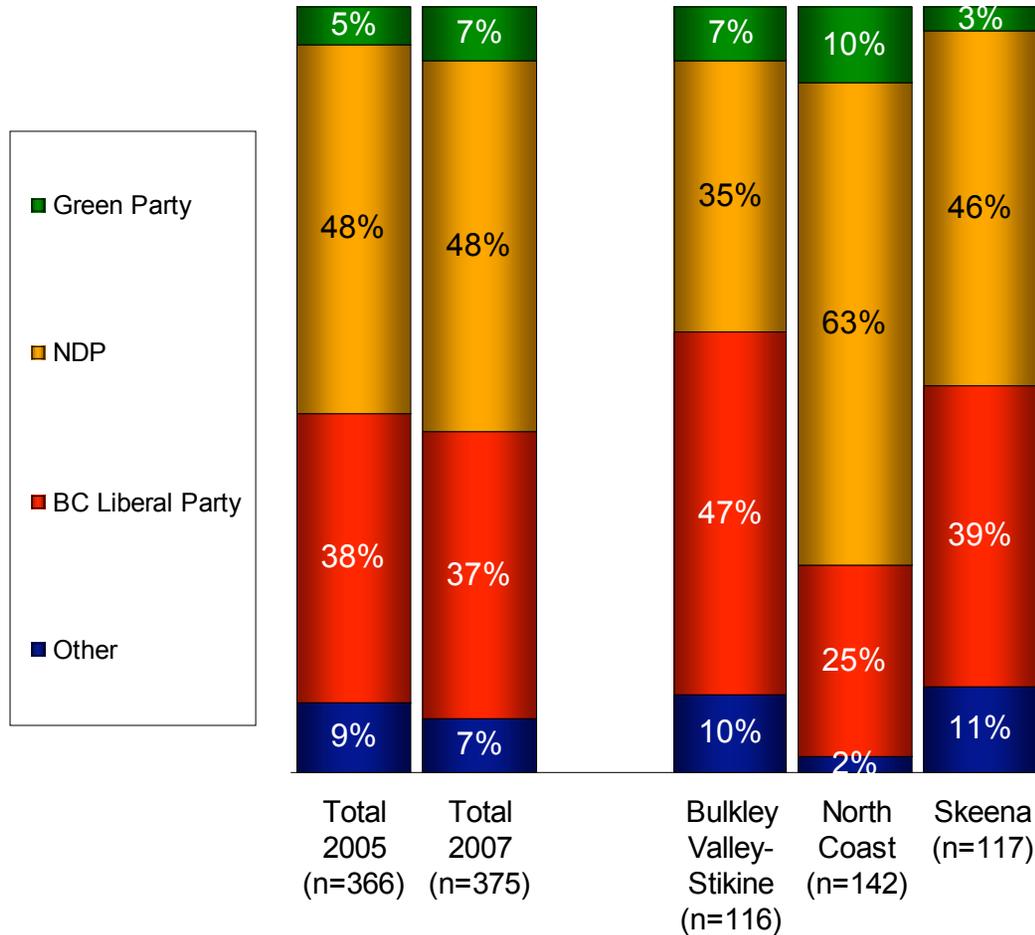
- Provincial Riding -

- Overall, 86% of adult residents in the Northw estern BC provincial ridings of Bulkley Valley-Stikine, North Coast and Skeena indicate that they w ill vote in the next provincial election. This includes seven-in-ten w ho say they definitely w ill vote and 16% w ho say they probably w ill do so. This leaves 12% w ho say they w on't vote and 2% w ho are undecided.
- Northw est BC residents' likelihood of voting is consistent w ith the pre-election levels tw o years ago.
- Residents across provincial ridings and urban and rural areas, are equally likely to vote.
- Definite likelihood to vote increases significantly by age, from 56% among those 18 to 34, to 74% among those 35 to 54, to 80% among those 55 or older. Younger residents are generally less definite in their intentions (i.e. more say they probably w ill or probably w on't vote).
- Only one-half of First Nations residents say they w ill definitely vote compared to three-quarters of other residents.
- Residents w ho intend to vote for the NDP (82%) and the BC Liberals (77%) are more apt than the average resident to indicate that they definitely w ill vote.
- Opponents of open-net salmon farming are not significantly more likely than supporters to go to the polls.

Provincial Election Voting Intent

Q2. Although the next provincial general election will not be held until 2009, if an election were to be held tomorrow which party would you vote for ...?

(Among Decided Voters)



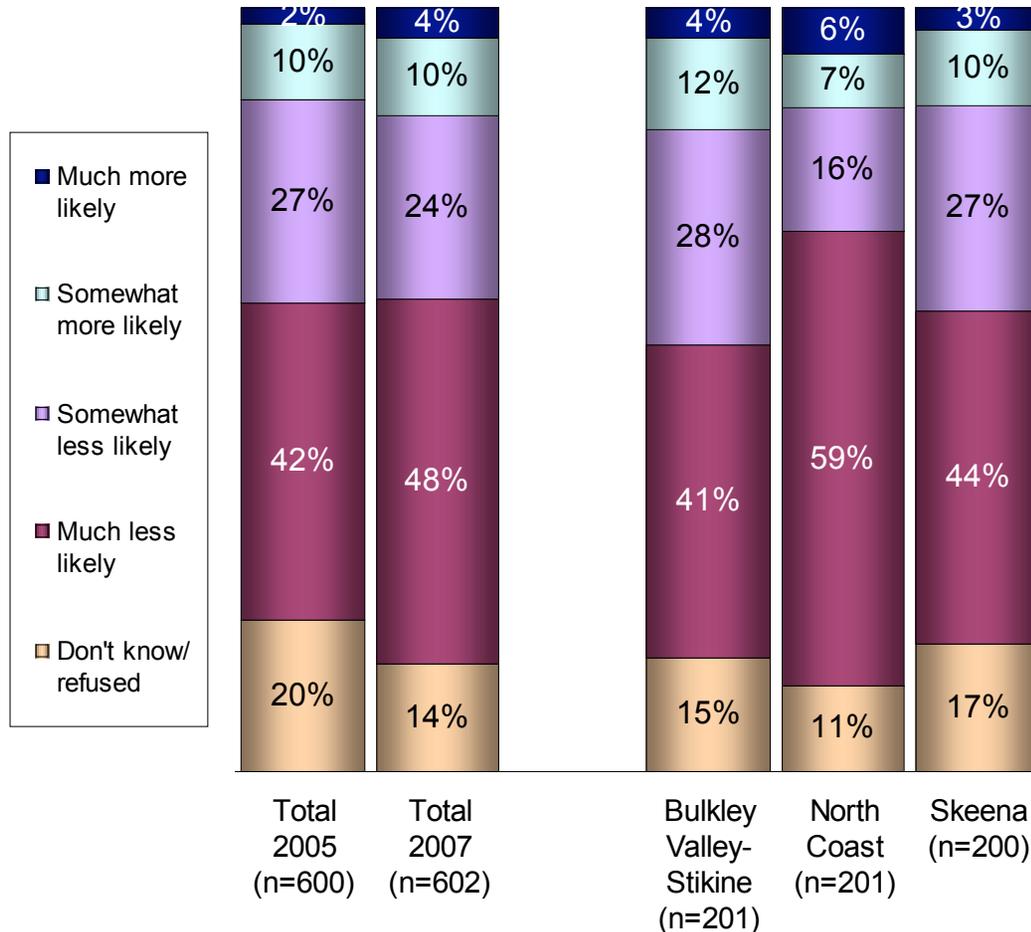
- Provincial Riding -

- The current total voting intent among decided voters mirrors that of 2005, with 48% support for the NDP, 37% support for the BC Liberals, 7% support for the Green Party and 7% support for other parties (6% of which is for the BC Conservative Party).
- Results vary significantly by provincial riding. In the North Coast, the NDP has a clear lead over its rivals with 63% of the decided vote (versus 25% support for the BC Liberals and 10% support for the Green Party). In Bulkley Valley-Stikine, the BC Liberals hold a slight edge over the NDP (47% versus 35%), while the race in Skeena is closer with 46% support for the NDP and 39% support for the BC Liberals (statistically, the NDP lead in Skeena is not significant). In the Bulkley Valley-Stikine and Skeena ridings, the BC Conservatives account for almost one-in-ten of the decided vote.
- Voting intent is consistent by age and across urban and rural areas. However, men (44% versus 30% among women) and non First Nations residents (40% versus 27% among First Nations residents) are more apt to support the BC Liberals while First Nations residents favour the NDP (63% versus 44% among other residents)

Impact Of Candidate's Stance On Voting Intent

Q10. If you learned that a candidate in your provincial riding supported open-net salmon farms on the North Coast would you be more likely or less likely to vote for that candidate? Would that be much or somewhat (more/less) likely?

Currently, 72% of Northw est BC residents indicate that a candidate's endorsement of open-net salmon farms would make them less likely to vote for that person. On the flipside, 14% are more likely to vote for that candidate.



- Compared to two years ago, Northw est BC residents' voting intent is more likely to be sw ayed by a candidate's support of open-net salmon farming. Specifically, 48% compared to 42% in 2005 are much less likely to vote for that candidate while 4% are much more likely to vote for that person (doubling from 2% in 2005). Correspondingly, those that are undecided decreased from 20% to 14%.
- North Coast riding residents are significantly more likely to sw ay aw ay from a candidate that supports the salmon farms, with 59% indicating they would be much less likely to vote for that candidate (compared to 41% in Bulkley Valley-Stikine and 44% in Skeena).
- 59% of NDP voters and 78% of Green Party are much less likely to vote for the candidate who endorses the fish farms, compared to 32% of Liberal voters.

- Provincial Riding 2007 -

Impact Of Candidate's Stance On Voting Intent

- Rural residents, recreational salmon fishers and those 35 or older are much less likely to vote for a candidate who supports open-net salmon farms.

Demographic Profile

| | Provincial Riding 2007 | | | | |
|---|------------------------|--------------------|--------------------------------|---------------------|-------------|
| | Total 2005 % | Total 2007 % | Bulkley Valley-Stikine % | North Coast % | Skeena % |
| Base | 600 % | 602 % | 201 % | 201 % | 200 % |
| Gender | | | | | |
| Male | 51 | 51 | 51 | 51 | 51 |
| Female | 49 | 49 | 49 | 49 | 49 |
| Age | | | | | |
| 18 to 34 | 30 | 31 | 32 | 31 | 30 |
| 35 to 54 | 44 | 46 | 45 | 46 | 46 |
| 55 or older | 23 | 24 | 23 | 23 | 24 |
| Refused | 2 | - | - | - | - |
| Ethnic Group | | | | | |
| Native/First Nations/Aboriginal/Native Indian | 18 | 21 | 16 | 33 | 14 |
| Other | 79 | 78 | 83 | 66 | 85 |
| Refused | 3 | 1 | - | 1 | 1 |
| Recreational Salmon Fishing | | | | | |
| Yes | 47 | 54 | 50 | 55 | 58 |
| No | 52 | 46 | 50 | 45 | 42 |
| Provincial Riding | | | | | |
| Bulkley Valley-Stikine | 34 | 34 | 100 | - | - |
| North Coast | 32 | 31 | - | 100 | - |
| Skeena | 35 | 35 | - | - | 100 |

Demographic Profile

- The current sample distribution mirrors that of 2005, with the exception that a higher proportion report that they or someone in their household took part in salmon fishing as a recreational activity in the past year.
- The sample is spread over the three ridings, there is almost an even male to female ratio, 46% of the sample is aged 35 to 54, three-in-ten are under 35 and one-quarter are 55 or older. In addition, one-in-five are First Nations residents and over a half report that they themselves or someone in their household did some recreational salmon fishing in the past year.
- In the North Coast riding, twice as many residents identify themselves as being First Nations (versus the Bulkley-Valley-Stikine and Skeena ridings).

Questionnaire