

Report to Greater Vancouver Gateway Council

Research Program and Recommended Messaging

Prepared by NATIONAL Public Relations

March 2009

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1.0 Acknowledgement

This report presents the findings of a study for Phase 1 of a multi-phased public relations campaign. Funding for the study was provided by Transport Canada through a grant to the Greater Vancouver Gateway Council.

The Steering Committee chaired by Bob Wilds, Managing Director of the Greater Vancouver Gateway Council, provided helpful guidance throughout the course of the study.

The study was conducted by NATIONAL Public Relations, with research support from Angus Reid Strategies and use of TransLink Listens online panel. Any error or omissions in the data collection, analysis in the data collection, analysis or interpretation of the study findings are solely the responsibility of the consultants.

The opinions expressed in this document are those of the authors and not those of the Transport Canada.

2.0 Assignment Overview

For the Greater Vancouver Gateway Council (“the Council”) and its members, growing the Gateway to deliver local, provincial and national benefits is priority number one. However, Council members acknowledge that Gateway growth can more easily occur (or can *only* occur) in the context of solid regional public awareness of the Gateway identity and acceptance of the benefits and opportunities that the Gateway represents.

With a full schedule of Gateway construction activities either underway or in development, and a public increasingly subjected to these activities and exposed to media focused largely on project critics, the Council and its members are committed to communicating Gateway benefits to the communities of Metro Vancouver. To move forward, the Council agreed on contribution funding from Transport Canada to develop phase 1 of a multi-phased communications strategy, involving:

1. Conduct research, both qualitative (focus groups) and online, testing perceptions and understood benefits of Canada's Pacific Gateway; and
2. Develop messaging that has local resonance and alignment with Canada's Pacific Gateway communications efforts.

Focus group details are as follows:

| Focus Groups | |
|----------------------|--|
| Approach | 6 focus groups (8 to 10 participants per group) Each 2 hours in length |
| Sample | 1. Vancouver, North Vancouver and Burnaby 2. New Westminister, Tri-Cities, Maple Ridge and Pitt Meadows 3. Surrey, Langley, Delta and Richmond |
| Criteria - a mix of: | Age, gender, occupation, ethnic background and transportation preferences – car, transit, bike |
| Dates | February 4, 5 and 6 |

Results from focus groups were further tested through TransLink’s online panel (TransLink Listens) to confirm messaging. TransLink Listens details are below:

| TransLink Listens | |
|-------------------|--|
| Approach | Develop survey questions based on focus groups to assess and confirm key findings |
| Sample | 2,009 participants |
| Criteria | Recruited through users of TransLink and subsidiary websites, banner ads on key local websites, phone recruits Residents of Metro Vancouver |
| Dates | February 23 – 27 |

Full reports from both research sets are appended at the back of this document.

3.0 Summary of Research Findings

3.1 Awareness and understanding

The Gateway is instrumental to the region's history and future – it is one of this region's most important economic assets. Research findings indicate, however, that this essential fact is not sufficiently appreciated or understood by the people who live here.

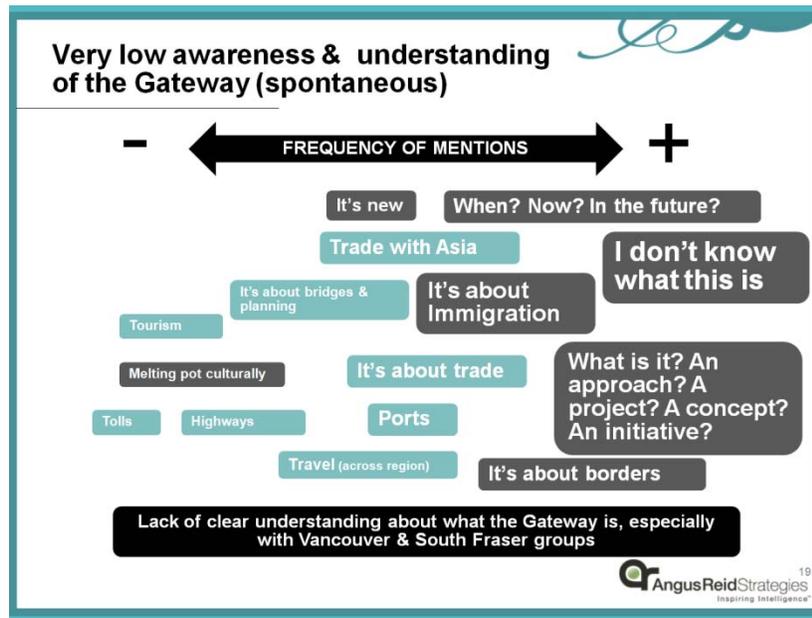
Among focus group participants, awareness and understanding of what Canada's Pacific Gateway is, how it works and who is responsible for it is very low. While participants were aware that shipping, rail, air and sea ports, trade, and infrastructure activities exist around Metro Vancouver, there was little awareness that these are components of a larger, integrated initiative. In fact, most research participants defaulted to commuting or public transit when they were asked about transportation in the Gateway.

At their most basic understanding, participants perceived the Gateway as an access point which facilitates trade and the flow of commerce to and from foreign markets. Of note, most identify with the import side of the equation due to concerns related to personal and economic security, as well as population growth and immigration.

Among Translink Listens panellists, a group of citizens interested and engaged in regional transportation issues, awareness levels of Gateway projects and the Gateway's core function to facilitate international trade was higher, but not as high as one might expect. Fifty three percent of respondents were unaware or not sure of the Gateway's existence or purpose. And like the focus group participants, panellists were more aware of specific projects and initiatives that they encounter in their daily lives, via commutes or through the media, than the Gateway as a whole.

Other notable observations include: with both research groups, there was a higher awareness of the Gateway and projects in the Tri-Cities and northeast sector of the region; there is confusion about Gateway names, with a higher level of recall for the term "Asia Pacific Gateway" than "Canada's Pacific Gateway"; and given low Gateway awareness, there is likely an even lower understanding of which level of government is leading the initiative and how the governments collaborate.

This slide, from the focus group research report (Appendix A), provides a snapshot of initial, unaided reactions by focus group participants:



Prepared by Angus Reid Strategies

3.2 Economic growth and mobility are core benefits

Identifying perceived and credible benefits of the Gateway is fundamental to starting a conversation with regional residents. While Gateway awareness was low, there was a broad acceptance of the notion that Gateway is, and can be, critical to the economic well-being of the region. Data such as “The Gateway contributes to one in seven jobs in Metro Vancouver” resonated well with most focus group participants, but more specific information was required to advance the credibility of the messaging further. For TransLink Listens panel participants, the message “Canada’s Pacific Gateway is important to our region’s economy and future prosperity” scored highest among four choices (discussed further below).

Another benefit of the Gateway (perhaps more desired than perceived) is the notion that the Gateway can provide increased mobility if it is well-managed, efficient and its infrastructure is improved. However, it is important to note that research participants found inconsistency in the “logic” that the Gateway could deliver economic growth as well as reduce congestion. This concern will need to be considered in the development of messaging.

Conversely, there was little credibility in the notion that the Gateway could provide environmental benefits to the region. Among TransLink Listen panellists, environment registered as the greatest concern (69%) followed by congestion (65%). Given that the environment is an important benefit to convey, this will need to be carefully considered in the development of messaging.

3.3 Credibility and relevance

Focus group participants craved factual and regionally-relevant information in order for messages to be considered credible and meaningful. Furthermore, messaging needs to demonstrate how the Gateway “benefits me personally” versus how the Gateway “benefits the province or the country”.

3.4 Benefits and concerns

The perceived benefits and concerns as identified in the research can be divided as follows:

| Benefits | Concerns |
|---|---|
| <ul style="list-style-type: none">•Economic growth•Mobility•Trade•Jobs/employment•Connections | <ul style="list-style-type: none">•Environment•Congestion•Cost of living•Population growth•Affordable housing |

4.0 Key words, phrases and tag lines

4.1 Key words

Given our assessment of the research, we have identified and arranged key words in the following categories to indicate which words help drive awareness and acceptance of what the Gateway provides, versus those words which raise concern and scepticism about what the Gateway does or says it can do:

| Easier “sell” | Tougher “sell” | Tough “sell” | STOP |
|--|--|--|--|
| <ul style="list-style-type: none">• Prosperity• Mobility• Future/ Opportunity• Connection | <ul style="list-style-type: none">•Growth•Competitiveness•Livable/ Quality of life | <ul style="list-style-type: none">•Environment•Sustainability•Infrastructure | <ul style="list-style-type: none">•Expansion•Congestion |

4.1.1 Easier “sell”

These words connect strongly with the accepted or desired notion that the Gateway is a generator of economic activity that offers “prosperity”, is key to our “future”, and provides a “connection” to “opportunity”, to each other and to activities throughout the region with increased “mobility”.

4.1.2 Tougher “sell”

While the words in this category connect less strongly, they do offer opportunity in communications provided that they are carefully considered and employed. The notion of “growth” is positive in terms of economic growth, but is negative in terms of population growth.

The notion of “competitiveness” resonates well with some (particularly the younger demographic), understanding that a competitive and efficient Gateway is instrumental to delivering the core benefits – Economic Growth, Mobility, Trade, Jobs/Employment, Connections. For other participants, competitiveness connotes winners versus losers.

The notion that the core benefits contribute to a “livable” region with a good “quality of life” was accepted by some. For others, “quality of life” and “livability” were terms difficult to relate to, or more closely associated with social or environmental benefits that participants did not associate with the Gateway.

4.1.3 Tough “sell”

As noted above, most TransLink Listens panellists and focus group participants were unable to associate the benefit of “environment” with the Gateway. The idea of “growth”, which for some evokes images of more cars and trucks, is counter-intuitive to economic improvement.

The term “sustainability” lacked resonance due to the fact that the participants perceived the word as overused and unsubstantiated “catch-all” term for all things environmental and “responsible.” Others did not understand that the full meaning of sustainability involves social, environmental and economic components.

For most, “infrastructure” did not resonate well due to concern about costs and disruption that the construction of infrastructure causes. Those who did rate infrastructure well, understood that new infrastructure is a part of Gateway improvements and an important vehicle for creating jobs, particularly in times of economic uncertainty.

4.1.4 Stop

The words in this category are, simply put, a “no-go”. The notion of “expansion” connotes growth that is uncontrolled, rampant or encroachment. The word “congestion”, while never to be used on its own, should not be used even when reverted to a positive such as “reduced congestion” or “less congestion”. As noted, the idea that the Gateway can achieve “less congestion” is not believed, whereas the idea that the Gateway can provide “increased mobility” is more believable.

4.2 Tag lines

Messaging and tag lines were also tested in the focus groups. With respect to messaging (see slide 53 in the focus group report for a full listing of tested messages), there was not a consensus on a preferred message. We were, however, able to glean key words and word groupings from the messages that resonated. In terms of tag lines, we were able to test the resonance of tag lines considered as part of the Canada's Pacific Gateway brand identity work and others introduced for purposes of the research exercise. The results are as follows:

| Key Taglines Tested | |
|---|----|
| A) A Stronger and Sustainable Future | ✓ |
| B) A Smarter Way to Grow | ✓ |
| C) Our Connection to Opportunity | ✓✓ |
| D) Safer, greener, and easier trips throughout our region | ✓✓ |
| E) Our Gateway, Our Future | ✓✓ |
| F) Canada's Pacific Gateway is our region's future | ✓ |

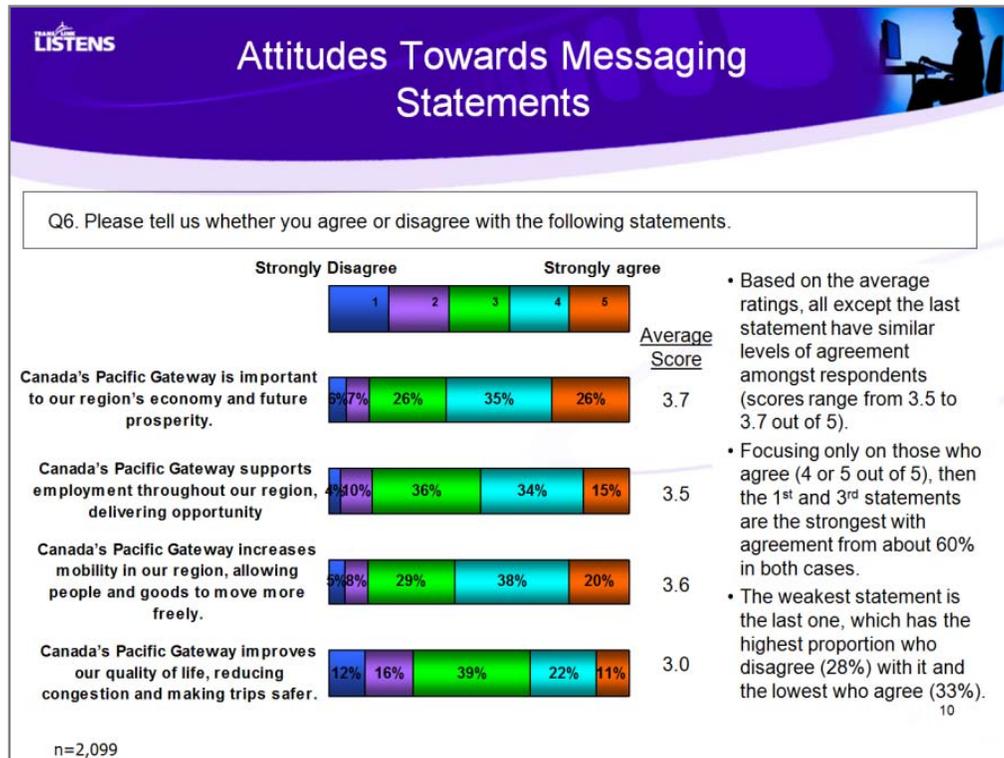
Prepared by Angus Reid Strategies

The taglines “Our Gateway, Our Future” and “Our Connection to Opportunity” resonated most strongly, were consistent with expressed attitudes and benefits most desired of the Gateway, and were consistent with the words and phrases favoured by participants.

In consideration that the tagline will be used in conjunction with “Canada’s Pacific Gateway” in communication efforts, “Our Connection to Opportunity” is the recommended tag line as opposed to “Our Gateway, Our Future” to prevent redundancy with the term “Gateway”. As well, “Our Connection to Opportunity” is considered a more active, current term that communicates desired benefits.

4.3 Phrases

TransLink Listens panellists were provided the opportunity to rate and rank messages that ranged in themes from **Economic Growth** → **Employment** → **Mobility** → **Quality of Life**. This slide, from the TransLink Listens panel survey results (Appendix B), demonstrates the comparative strengths of these themes and perceived benefits:



Prepared by TransLink

Consistent with observed attitudes, panellists expressed strongest support for the **Economic Growth** themed message, with a sizable 61% in strong agreement. The **Mobility** themed message ranked second, with 58% in strong agreement, followed by the **Employment** themed message with 49% in strong agreement, and 36% in moderate agreement. In fourth was the **Quality of Life** themed message, with only 33% in strong agreement and a larger 39% in moderate agreement.

5.0 Approaches to Communications

As discussed, it is important to know which words and phrases can be used successfully in communicating Gateway benefits. It is also important to consider how-to-use and when-to-use these words within a formal communications program. Below are some considerations:

5.1 Education

Given the responses of the survey groups and our observations of how the groups conversed and formed these responses, one clear conclusion emerges that should form the basis of whichever communications strategy is developed – the residents of the region require a sustained “Gateway education”. This education should consider ingredients such as basics, information and evidence.

5.1.1 Basics

As focus group researchers Angus Reid Strategies assert, communication about the Gateway must first address the fundamentals or basics:

- What is the Gateway?
- Who does it involve/encompass?
- When was the Gateway created? (i.e. past, present or future)
- Where does the Gateway happen?
- Why should I care about the Gateway?

5.1.2 Information

As noted in the summary of research findings section above, data mining for relevant, local and credible information will key be in this process. The economic impact study prepared for the Council (“The Economic Role of the Gateway Transportation System in the Greater Vancouver Region”) is one such resource. Other data from Council members would also be useful.

5.1.3 Evidence

Also key in the education process will be the use of examples that illustrate how the Gateway delivers benefits that participants do not currently associate with the Gateway. For example, providing evidence of how Council members value the environment and are implementing actual, innovative processes to safeguard it.

5.2 Audiences

Another consideration to make in developing communications approaches is understanding i) how Gateway audiences differ throughout a diverse region, ii) how they wish to receive information, iii) how the information should be tailored to suit preferences, and iv) how they see themselves in the Gateway. As Council members have described, communications have to make sense to the “neighbour”, with the information answering the core question: “What does the Gateway mean to me?”

5.3 *Identity: form and function*

It will be critical to communicate that the Gateway is both form and function. Form, in that transportation activities take place in a defined region. Function, in that these activities comprise an integrated transportation system that facilitates the movement of goods and people. The Gateway's dual identity is difficult to simplify, but is key to crafting communications that resonate and can move attitudes in the right direction.

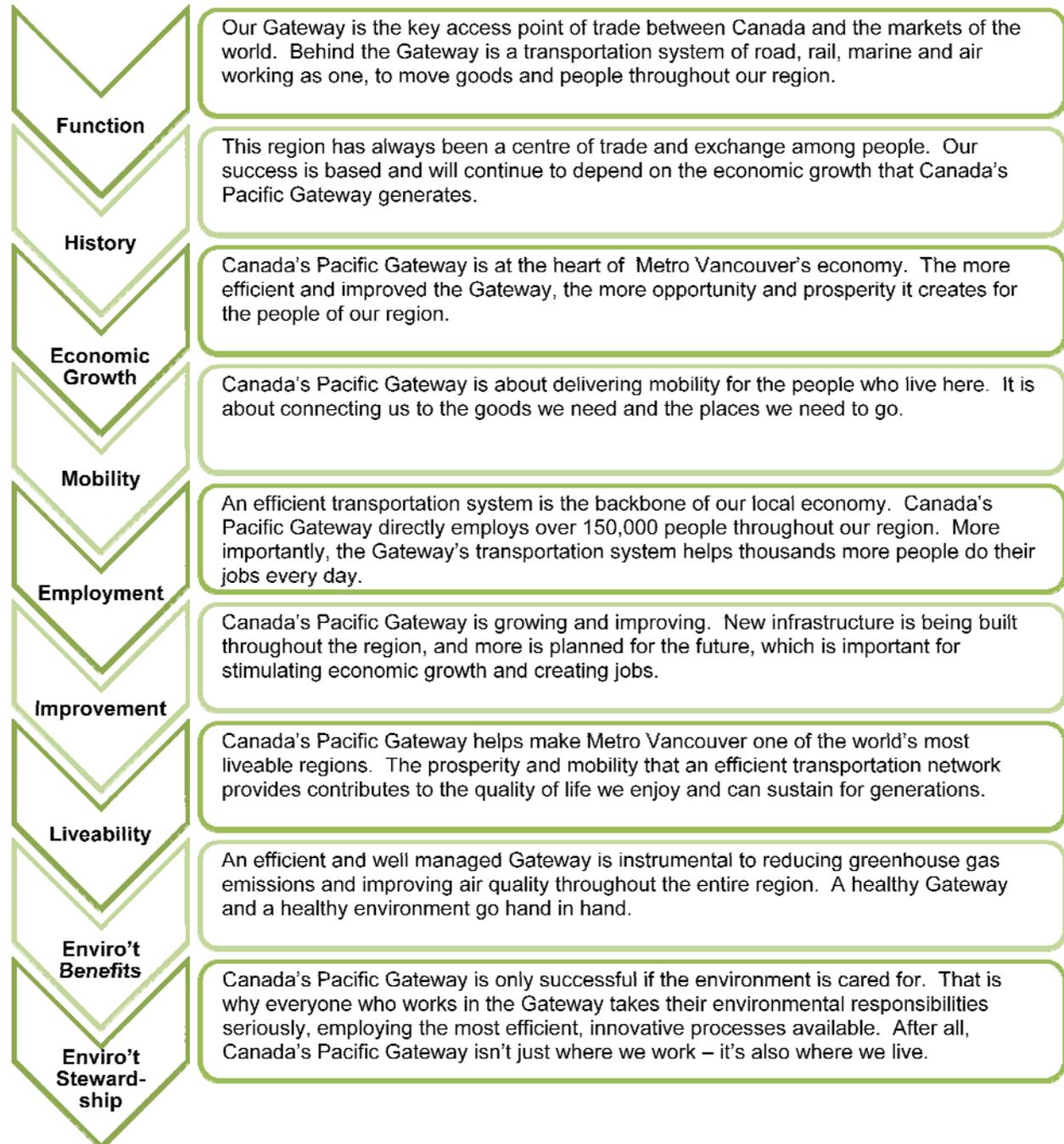
5.4 *Sequencing*

Messaging and tactics may need to be sequenced to ensure the Gateway is building a widespread foundation of support. To do this, the awareness-building communications efforts need to use strong, focused messaging that is credible with audiences today – economic growth, mobility, etc. This will seed and support later efforts to build acceptance for other benefits that are, at this stage, not easily associated with the Gateway (i.e. Quality of life).

6.0 Message Narrative

We propose the following messages in a narrative format. As discussed in this report, these messages need to be used with relevant data and tangible examples from Council members.

Core Message
Canada's Pacific Gateway, and the transportation network behind it, connects the people of Metro Vancouver to each other and the places we want to be. At the heart of our region's economy, the Gateway is our connection to opportunity.



7.0 Appendix A

Focus Group Awareness and Message Testing Research Report

Prepared by Angus Reid Strategies
March 2009



Date: March 4th 2009

GVGC Awareness & Message Testing Research

Prepared for: GVGC & National PR

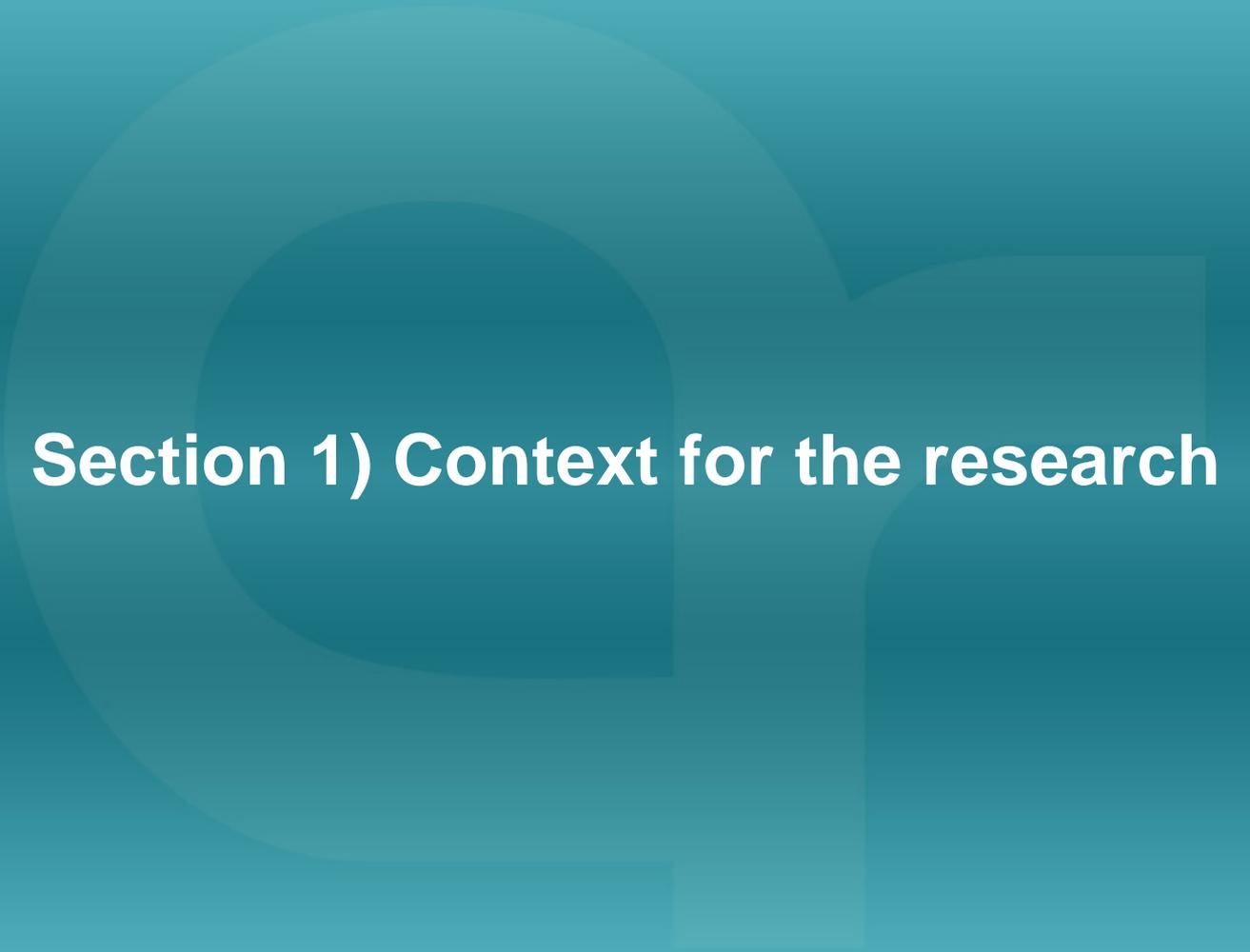
Presented By: Monique Morden & Aisling Murphy

Reporting flow

- **Section 1: Context for the research**
 - Background
 - Research Objectives
 - Methodology

- **Section 2: Executive Summary**

- **Section 3: Main Findings**
 - Key Insights Covering:
 - Key Needs
 - Gateway Awareness & Perceptions
 - Gateway Benefits & Concerns
 - Messaging & Tagline Learnings
 - The Need for Tailoring
 - Conclusions & Recommendations
 - Appendix



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Section 1) Context for the research

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Background



- **The geographic positioning of Metro Vancouver means the region has always been a natural gateway for trade**
- **The Greater Vancouver Gateway Council (GVGC) is working to improve the movement of people and goods throughout the region**
- **The Gateway's goal is to facilitate placing Metro Vancouver as a world transportation gateway, capitalizing on opportunities for growth from expanding world trade and tourism**
- **Growth is at the core of the Gateway, and the GVGC predicts that by 2030 cargo and passenger volumes will double, providing significant economic opportunities for Metro Vancouver**
- **Research is required to assess local awareness and understanding of the Gateway to ultimately inform the messaging campaign conveying the benefits of the Gateway to local residents**

Specific Research Objectives

- **The overriding objective guiding the research is to inform messaging conveying the benefits of the Gateway to local residents**

- **More specific objectives driving this evaluation:**
 - ✓ How do participants define quality of life and how could the Gateway help in achieving this?
 - ✓ How aware are participants about the Gateway?
 - Where have they heard about it? What have they heard? What have they experienced?
 - ✓ What level of understanding exists?
 - What do they understand?
 - What do they need to understand?
 - ✓ What benefits do they perceive the Gateway offers?
 - ✓ What concerns does the Gateway raise? And how can these be addressed?
 - ✓ In communicating the benefits of the Gateway what focus should this take? Economic? Environmental? Social?
 - ✓ What are the key ingredients in communicating the benefits and addressing concerns of the Gateway?
 - What language resonates most strongly in conveying the benefits of the Gateway?
 - What language is rejected and why?

Methodology

APPROACH

- 6 x focus groups
- Each 2 hours in length

SAMPLE

- **Regional focus:**
 - 2 x groups with Vancouver residents: Vancouver (East Side/West Side)/ North Vancouver City & District / Burnaby
 - 2 x groups with Tri Cities residents: New Westminister/ Coquitlam/ Port Coquitlam/ Port Moody/ Maple Ridge/ Pitt Meadows
 - 2 x groups with South Fraser residents: Surrey/ Langley/ Delta/ Richmond

RECRUITMENT CRITERIA

- **Mix of age & gender**
- **Mix of occupations**
 - Retirees, fully/part time employed, students, stay at home parents
- **Mix of travel preferences around Metro Vancouver**
 - Drive, cycle, transit bus, Sea Bus, Sky Train, combination, or walk
- **No priming on topic for discussion**

DATES

- **Research conducted February 3rd, 4th, & 5th 2009**

Definition and visuals provided for context

Canada's Pacific Gateway is a system of transportation infrastructure, including British Columbia Lower Mainland ports, road and rail connections that reach across Western Canada and into the economic heartlands of North America, as well as major airports and border crossings. It is also known as the **Asia-Pacific Gateway and Corridor**¹



¹Transport Canada APCGI

Section 2) Executive summary

Executive Summary

- **Awareness of the Gateway brand is low**
 - Residents are aware that shipping, rail, air & sea ports, import and export, and infrastructure projects exist around Metro Vancouver, however they do not assign it a name
- **There is a very weak understanding of what the Gateway is**
 - Some familiarity exists with individual Gateway projects, but overall majority lack a clear and succinct understanding of what the Gateway is
 - Is it an approach? A project? Is it current or happening in the future? Is it a place?
- **Although small sample, circumstantial regional differences did appear**
 - Tri Cities: Showing deeper understanding due to greater exposure of twinning of Port Mann bridge and Pitt River bridge and Mary Hill Interchange – but still limited understanding
 - Vancouver : Low awareness. More transit focused in their needs.
 - South Fraser: Some awareness, but still struggle with the concept. Mixed needs in terms of bus & rail transit, and traffic congestion.

Executive Summary

- **Associated benefits of the Gateway are largely around economics and mobility**
 - An appreciation exists around the financial importance of the Gateway, and an opportunity exists to capitalize on this in terms of conveying the personal economic benefit
 - Improvement of mobility around the region also perceived as a key benefit driven by ease of movement and increased connectivity
 - But some concerns around growth are also evident (i.e. population growth planning)
- **Understanding of the Gateway rarely appreciates the ‘export’ facet, and is largely linked to ‘import’ - consequently this emphasis on import raises concerns**
 - Influx of people conveys perception of less jobs, increased congestion, more expensive housing, and generally more to compete with
 - Safety concerns in terms of terrorism and environmental concerns (bio hazards, Mountain Pine Beetle, SARS)
 - Immigration concerns leading to associated social issues
- **Credibility and believability in providing such benefits will be a key challenge facing the GVGC and partners**
 - Current experiences of the Gateway have not always been positive
 - Residents want clear answers supported by evidence as to how the Gateway will benefit them personally

Executive Summary

- **No overwhelming winner amongst messages – however some messages and elements resonating more strongly**
- **Communication of the Gateway must first address the ‘fundamentals’**
 - What is the Gateway?
 - Who does it involve/ encompass?
 - When does the Gateway happen? E.g. Historical part of the region, ongoing, and future oriented
 - Where does the Gateway happen? How far does it stretch?
 - Why should I care about the Gateway?
- **Different residents have different needs and as such the Gateway messaging should be prepared to answer to various audiences**
 - Those experiencing construction
 - Those not witnessing the initiatives
- **Gateway messaging could also benefit from being more informative in its content**
 - Prepare: What is happening? What is the plan?
 - Manage: Updates on the plan? Involving residents in the process?
 - Conclude: Communicate the end result?
- **Focus group participants who recall communications about the Gateway, currently receive information at the ‘pain point’ e.g. signs viewed while delayed in traffic**
 - Opportunity to diversify communication about the Gateway

Section 3) Main Findings

INSIGHT #1

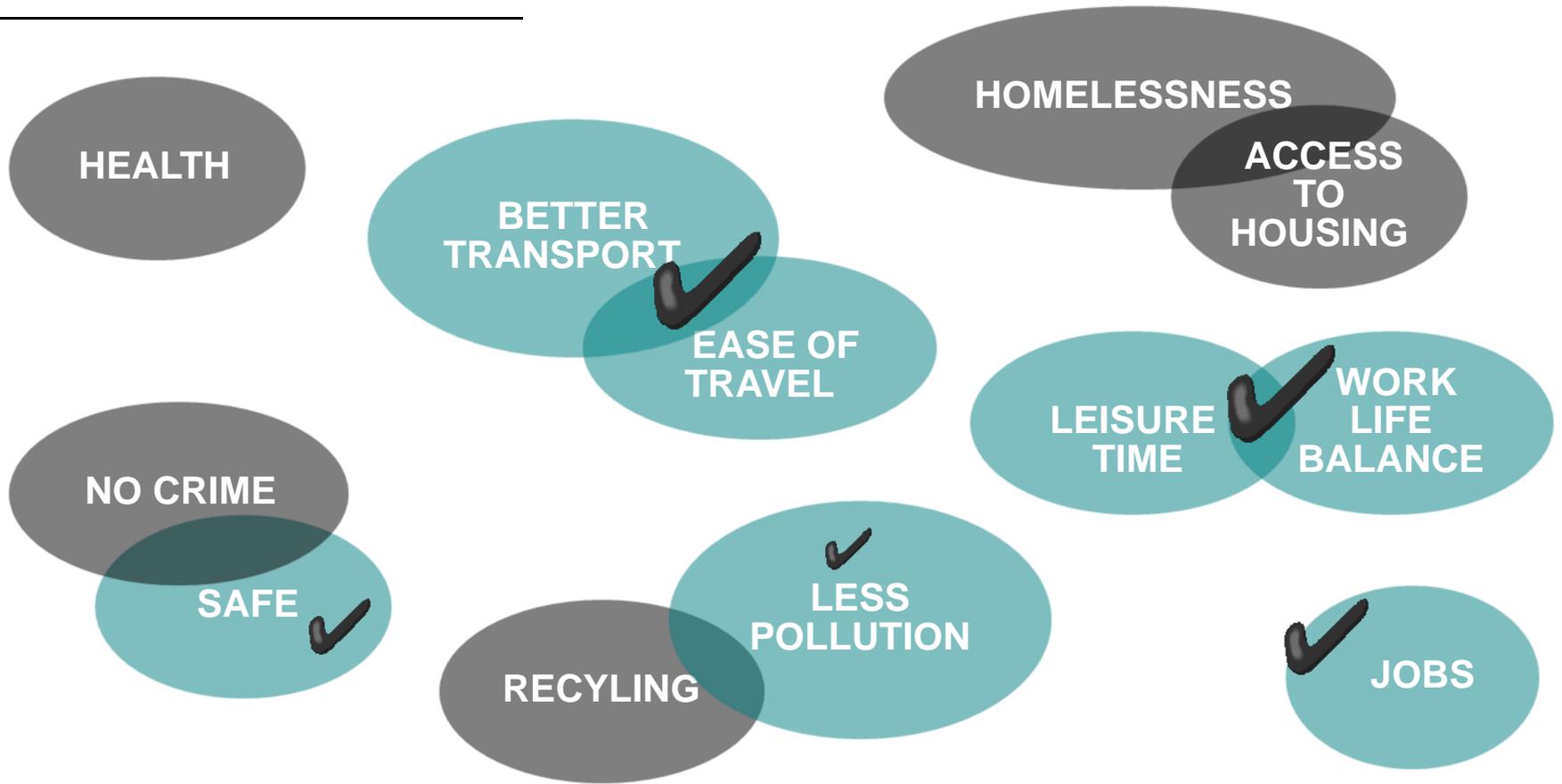
Quality of life is associated with a range of descriptors and needs.

- Some key facets emerge around the themes of community and connectivity. Residents wish to feel connected and able to enjoy time freely with friends and family. Economic vitality is
- also linked to quality of life in terms of access to jobs, which in turn provides stability and a means to enjoy life.

IMPLICATION:

Opportunity exists for the Gateway to meet these needs both tangibly in terms of mobility, personal economic benefit of jobs and growing regional wealth, and also in terms of emotional benefits such as time with family and better work/life balance.

Consistent themes emerging around quality of life



Opportunity for the Gateway to meet some quality of life needs focused on connection, mobility and economic benefit

Needs the Gateway can address

✓ QUALITY OF LIFE

- Free time
- Time with family
- Work/life balance (less time in commuting)

✓ MOBILITY

- Better transport
- Ease of movement
- Safer (fewer trucks on road, better transit schedules)

✓ ECONOMIC BENEFIT

- Job opportunities
- Centre for business
- Growth



UNDERPINNED BY CONNECTION

- Socially
- From A to B
- To the local economy (via jobs, local economic prosperity)



The Gateway can offer quality of life, mobility and economic advantages, however these will span from emotional through to tangible benefits. Notion of connection ties these benefits together

What about the environment?

- Raised as a key desire in terms of quality of life and improvements to community
- However, not perceived as a benefit the Gateway can offer or deliver
- Lacks credibility and perceived as disjointed when discussed in context of growth and expansion
- In addition, eco-friendliness appears to be assumed today

In communicating the benefits of the Gateway, consider conveying that the environment is important to the Gateway, but not a major benefit focus

INSIGHT #2

Awareness & understanding of the Gateway is low.

- Residents appreciate that sea & air ports, rail, transit, trade and infrastructure projects are an important part of Metro Vancouver,
- but they do not appear to appreciate how these facets are integrated. Nor do they currently perceive there to be a label or identifier for this e.g. “the Gateway.”

IMPLICATION:

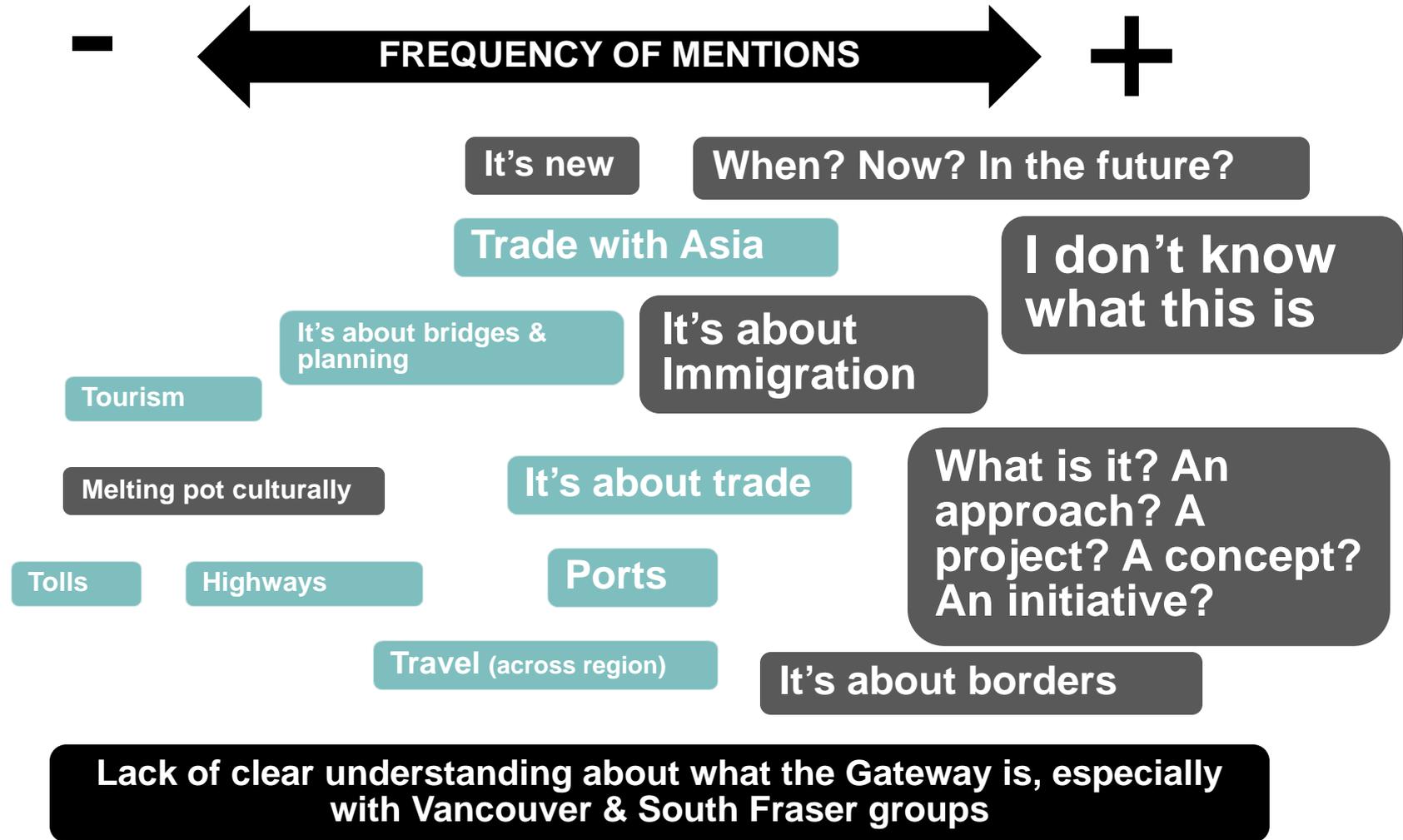
Before conveying the benefits of the Gateway, residents require a ‘back to basics’ communication to define and explain what the Gateway encompasses.

Introducing the Gateway – key learnings



- **Overall the concept of the Gateway is very challenging for participants to visualize and understand**
 - No immediate mental picture of the Gateway comes to mind
- **Constantly struggling to visualize what it is, how it works, and who is involved**
- **Confusion exists around the timeline of the Gateway with many believing the Gateway is planned for the future, not currently underway**
- **Some familiarity does exist with Asia's Pacific Gateway but few connecting this to the Canada's Pacific Gateway brand**

Very low awareness & understanding of the Gateway (spontaneous)



Lowest understanding amongst Vancouver & South Fraser groups



- **Tri Cities demonstrating greatest awareness and understanding of the Gateway driven by greater exposure to projects and initiatives**
 - “I’ve seen the Gateway signs while sitting in my car in traffic”
 - Can equate to a ‘pain point’ and thus more cynical attitude seen with Tri Cities
 - Awareness also likely driven by vested interest to their region e.g. Twinning of the Port Mann bridge
- **South Fraser group slightly more in tune with the Gateway due to greater commuting exposure**
 - Highways
 - Tunnel
 - Sky Train
- **Vancouver residents struggling to clearly and succinctly explain the Gateway**
 - Exposure appears to be largely transit related
 - Buses, Sea Bus, Sky Train

Tri Cities experiencing greater exposure to the Gateway

- Tri Cities able to provide some examples demonstrating understanding of the Gateway:

Bridges

Delta port

Port Mann bridge

Tolls

- However cynical in attitude and associated perceptions of Gateway largely negative:

Loss of conservation land due to expansion e.g.: Burns Bog

Loss of farmland due to expansion

Poor planning of projects

Immigration – influx of people

- Overall limited positive associations, but some perceived benefits around access & commerce (spontaneous comments)

Despite higher awareness & knowledge, understanding is still not robust. Thus Tri Cities *also* requires educating on what the Gateway is and does

Weak recognition of the Gateway brand requires back to basics communication

WHAT

- **Need to define what the Gateway is**
 - What does it encompass?
 - What does it do?

WHO

- **Need to communicate who is involved in the Gateway**
 - Metro Vancouver only?
 - Ports only?
 - BC? All of Canada?
 - Provincially led? Federally?

WHERE

- **Need to convey geographically how the Gateway is defined**
 - Metro Vancouver only?
 - All of BC?

WHEN

- **Need to address the timeline of the Gateway**
 - The Gateway is of historical significance to the region
 - The Gateway is current
 - The Gateway is about our future

WHY

- **Need to communicate the value of the Gateway**
 - What is the benefit to me?
 - What is the benefit to my community?

INSIGHT #3

- The initial concerns associated with the Gateway outweigh the benefits. This can be attributed to lack of understanding about the Gateway. Currently there is a strong disconnect between the Gateway and personal benefit. However benefits raised do appear to match the needs cited: economics, mobility and connection.

IMPLICATION:

Moving forward addressing barriers will require greater education about what the Gateway is and does, and clarification over misconceptions that are held. Residents need to feel a personal benefit from the Gateway.

When contextualized, understanding of Gateway improves but still evident that brand recognition is low

- **Visuals and definitions help participants to appreciate & understand the entirety of the Gateway**
 - Rail, roads, transit buses, sea ports, air ports
- **Many feel they know that such infrastructure exists, however labeling or naming it the Gateway is new information**
- **Currently understand the Gateway in terms of pieces rather than the concept as a whole**
 - Port Mann bridge twinning or Canada Line construction on Cambie Street
 - Driven by regional circumstance

Weak awareness and understanding of the Gateway leads to more perceived barriers than benefits

Perceived benefits of Gateway



ENVIRONMENT

- Improved transit means decreased congestion
 - More buses & trains
 - Better schedules
 - Efficient

TIME TO ENJOY

- Less time commuting means more time enjoying life

GREATER CULTURAL DIVERSITY

- More cultures living in region
- Choice of food and cultural entertainment
- Tourism

JOBS

- Greater influx of business & trade means more opportunities

VARIETY & COST OF GOODS

- Influx of range of goods means greater choice
- Also means cheaper goods

STRONGER ECONOMY

- Increase in trade
- Imports/exports
- Tourism

MOBILITY

- Travel from point A to B across Metro Vancouver
- Tourism
 - Coming to the region and access out of the region

Associated benefits often not top of mind. However further discussion highlights that economic and mobility benefits are perceived as something the Gateway could offer

Perceived concerns of Gateway – often centre around uncontrolled growth and expansion



● CULTURAL DIVERSITY

- Competition for jobs
- Crime

● CRIME

- Greater influx of people means increased crime

● HOUSING PRICES

- More people = more competition for real estate

● LOSS OF BUSINESS

- Influx of business means bigger corporations replace small business
- Related to this is urban sprawl and loss of community

● TAXES

- Who pays for all this?

● POOR PLANNING

- Historically initiatives in Vancouver have not been well planned
- Equates to a waste of money

● URBAN SPRAWL

- Getting too big too fast
- Influx of people means spreading out

● WHAT ABOUT OUR OTHER NEEDS?

- Homelessness
- Education
- Poverty

+

● FEWER JOBS

- Influx of people means greater competition for jobs
- Perceived as only construction

● ENVIRONMENT

- Congestion of ports lends to pollution in ocean
- Ecological reserves being exploited (Burns Bog)

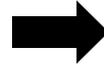
● CONGESTION

- Increase of population
- Increase of movement in & out driven by import/export

Top of mind impressions more negative than positive. Created by lack of understanding about the Gateway – increased knowledge is a key factor overcoming concerns

To overcome concerns, addressing misconceptions about the Gateway will be key

✗ It's not new, nor will it start in the future



✓ It's historically our economic backbone, it's current and a part of the region's future

✗ It's not just about importing & influx



✓ -It's a two way flow of import & export
- It's an access point and a pathway

✗ It's not just about Asia



✓ It's about international trade

✗ It's not just about goods



✓ It's about the flow and movement of goods & people

✗ It's not just construction



✓ It's about a variety of growth and investment



To move forward there are three key things to address: concerns, credibility and connection

1 Lack of understanding around the Gateway lends to magnitude of concerns

- Perceptions are based on basic Gateway synopsis vs. what residents actually know
- Knowledge is missing

2 Credibility of benefits is questioned often due to lack of true understanding about the Gateway

3 The concept of connection must also be addressed

- Residents currently do not feel connected to the Gateway
- The benefits highlighted demonstrate the opportunity to leverage economic advantages and mobility

Knowledge and understanding will be central to overcoming concerns, conveying the benefits as credible, and sharing connection to the Gateway

INSIGHT #4

- No one 'winner' emerging from the messages tested, but some favored over others. Strong consistency exists around the most compelling 'ingredients' to communicate the benefits of the Gateway: concepts of economic opportunity, community, mobility, and future oriented resonate strongly.

IMPLICATION:

Mindset prevailing is one of some skepticism around the credibility of the Gateway to answer to its claimed benefits. Messaging should prepare to answer 'HOW' the Gateway works in achieving the outlined benefits. In addition, different residents have different needs and thus conversations about the Gateway should be 'neighborhood' focused.

Messages - overview

- **No overwhelming winner amongst messages – however some messages and elements resonating more strongly**
- **Credibility of messages is currently questioned, and communications will need to be prepared to address this**
- **Specifically, the question of ‘HOW’ is currently raised in relation to the messages and will require proof to validate**
 - E.g. How is this possible? What plan is in place to achieve this?
- **Some cynicism in attitude driven by a ‘too little, too late mentality’ especially with Tri Cities groups**
 - E.g. Many feel the attempts to improve infrastructure and mobility lack forward thinking and have come too late
- **Research identified key themes and language deemed compelling and motivating to leverage moving forward**

What works well – key messaging elements to leverage

ECONOMICS & COMMERCE

- Conveying potential financial success resonates, especially given current climate
- Valuable to communicate a tangible economic benefit at a personal and community level
- Key phrasing:
 - Prosperity
 - Success
 - Opportunity
 - Improvement

UNITY & SHARED EXPERIENCE

- Conveying the shared experience of the Gateway resonates strongly
- Helps to convey a cooperative spirit in relation to the Gateway
 - Moves away from ‘us’ and ‘them’ mentality
- Key phrasing:
 - Our region
 - Community
 - Local focus – BC/ /Province/Region (vs.. Canada)
- However care must be taken on how this is conveyed
- Language that dictates involvement is rejected because lacks choice in the matter
 - ‘We are all part of Canada’s Pacific Gateway’
 - “We all depend”

CONNECTION

- Ability to travel easily is a key need
- Concepts around efficient movement are well received
- Key phrasing:
 - Mobility
 - Easier
 - Improvement
 - Movement
 - Efficient

What works well – key messaging elements to leverage

HISTORICAL

- Provides strong introduction
- Helps convey the Gateway is a defining facet of the region economically, socially, culturally
- **Key phrasing:**
 - Backbone
 - Has always been
 - Natural

THINKING

- Current attitude is that projects & initiatives are not well planned
- Communication around preparation & forward planning resonates
- **Key phrasing:**
 - Future oriented
 - Planned growth
 - Well managed
 - Smart

PEOPLE

- Acknowledging that the Gateway is about people helps residents see themselves as part of the process
- **Key phrases:**
 - ‘The movement of goods & people’

What works well – key messaging elements to leverage



MAKES POSSIBLE

- Concepts that convey the Gateway can help provide something resonate
- Key phrasing:
 - Helps...
 - Allows for X
 - Makes easier
 - Improves



ENJOYMENT

- Highlighting that specialness of the region can help remind of how residents benefit from the Gateway
- Key phrase:
 - ‘That we all enjoy’
 - the Gateway connects us to the things we enjoy

What can work – but needs careful consideration



EMPLOYMENT

- The concept of employment working well in essence – conveys a personal economic benefit
- However care needs to be taken on how this communicated
 - 1/7 jobs is too low given vastness of the Gateway
 - Language such as 'supports 1/7 jobs' is nebulous
 - Credibility of numbers questioned



SUSTAINABILITY

- Sustainability often rejected in relation to the Gateway
- If the Gateway is about growth and improvements – it is disconnected from the concept of sustaining
- Some comments that word is overused
- But for some concept of sustainability conveys positive associations
 - Thoughtful planning
 - Economically sustainable



SAFETY

- Safety is an interesting benefit but many unclear what this means in regards to the Gateway
 - Safety of roads?
 - Better buses?
 - Less cars on the roads so kids can play
- Explanation and supporting info required to move forward with safety message

Confusion driven by lack of understanding

What's not working – key messaging elements to lose



COMPETITION

- Concept of competition in relation to the Gateway often rejected
- Too aggressive
- Conveys rivalry which is seen as a bad thing
- Someone always loses in competition

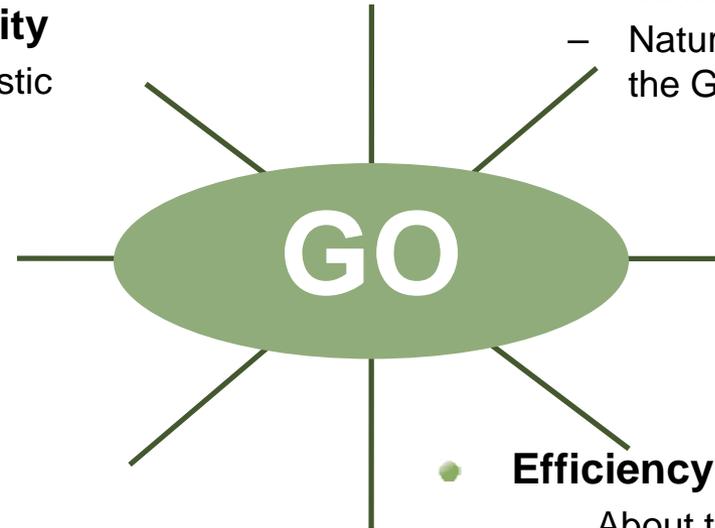
- However, does resonate with younger residents especially males
 - They believe a competitive economy is a healthy economy



ENVIRONMENT

- Messages that focus on environmental benefits appear contradictory to the Gateway
- Communication on environment would need evidence backing it

Words to use



- **Well managed**
 - Gateway is being thought through

- **Opportunity**
 - Optimistic

- **Integrated**
 - Interconnections
 - Feeling a part of things
 - But also conveys disorganization

- **Freely**
 - Not delayed
 - Your own choice

- **Future**
 - Forward thinking
 - Assume planning is being done

- **Connection**
 - Coming together
 - Ability to get from A to B easily
 - Community

- **Natural**
 - Obvious choice
 - Natural beauty of the Gateway region

- **Prosperity**
 - Positive
 - Strong language in current economic climate

- **Improvements**
 - You can't disagree with improvements

- **Efficiency**
 - About things that work

- **Growth**
 - Organic

- **Mobility**
 - About getting from A to B easily
 - Ability to get around
 - Freedom
 - Movement

- **Easier**
 - Implies trouble free

Words requiring consideration...

- **Quality of life/livable**

- Has positive associations
- BUT...a subjective term

- **Competitiveness**

- Generally perceived as too aggressive in tone
- But...competition is healthy
- Can be conveyed through “success”
- Often preferred by men



CAUTION

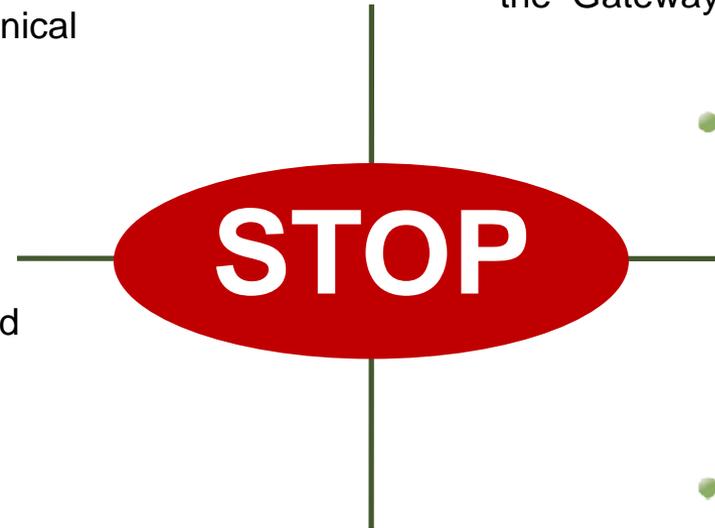
- **Infrastructure**

- Does not currently fit with perceptions of Gateway
- But...can provide benefits in terms of economy

- **Safety**

- Confusing
- Requires explaining in context of the Gateway

Words to lose...



- **Expansion**

- Overtaking
- More congestion
- Construction/mechanical

- **Depend**

- Raises disagreement
- Don't want to be told 'we depend'

- **We all**

- Too dictatorial
- Fails to allow for personal choice

- **Environment/ Green/ Eco friendly**

- Lacks credibility

- **Sustainability**

- Understood as 'maintaining' thus disconnect from Gateway concept of growth & improvements
- Also lacks integrity in relation to the Gateway

- **Critical**

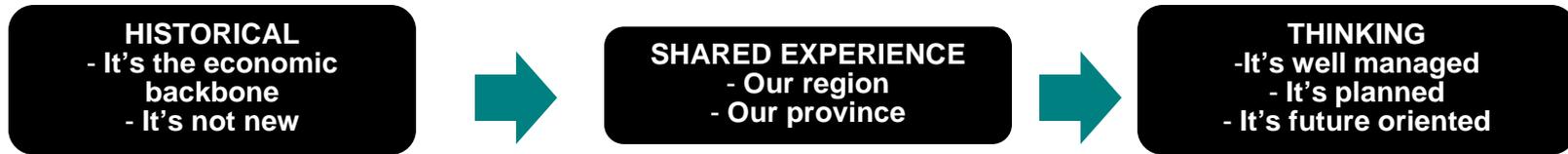
- Too harsh
- Black & White
- Essential suggested as improvement

- **Smart transportation**

- Disconnect from current experiences

Key messaging ingredients

WHAT the Gateway IS:



THE TANGIBLE BENEFITS:



THE EMOTIONAL BENEFITS:



Taglines overview

- **Low knowledge base and lack of Gateway brand awareness leads to some confusion in discussing taglines**
 - E.g. Unable to assume what the brand stands for
- **Same learnings as seen with messages apply to the taglines**
 - Positive & Optimistic language (e.g. opportunity)
 - Future oriented (e.g. the future)
 - Shared involvement (e.g. Our)
- **Taglines that focus on the environment lack credibility in relation to the Gateway**

Taglines

| Key phrases tested | |
|---|---|
| M) A stronger and sustainable future | ✓ |
| N) A smarter way to grow | ✓ |
| O) Our connection to opportunity | ✓ |
| P) Safer, greener, and easier trips throughout our region | ✓ |
| Q) Our Gateway, Our Future | ✓ |
| R) Canada's Pacific Gateway is our region's future | ✓ |



Sustainable questioned in relation to the Gateway



Shows thinking & management, but residents lack strong enough level of understanding about the Gateway to appreciate message



Partnership concept well received and opportunity deemed optimistic



Conveys improvement, but too long & lacks credibility



Strongest overall. Simple & clear. Use of 'our' conveys shared experience with the Gateway

Some comments that Your Gateway, Our Future may provide even greater involvement



Message is compelling. But too long and wordy. Same message conveyed in Q

INSIGHT #5

- Different regions have different experiences of the Gateway therefore any communications must be prepared to tailor to regional differences.
-

IMPLICATION:

Messaging about the Gateway to consider two steps: First going back to basics to increase awareness & understanding. Secondly, the messaging for the Gateway should be prepared for different neighborhood conversations.

Conclusions & Recommendations

A two tiered approach to raise awareness

- **There is currently low awareness around the Gateway brand**
 - Residents are unaware what the Gateway is, does and stands for
- **Raising awareness may require a two tiered approach:**
 - Tier 1: Back to basics → Who? What? When? Where? Why?
 - Tier 2: Communicating the benefits
- **Communication around the Gateway may also benefit from being more informative in its content**
- **Different audiences will have different needs, and as such neighborhood conversations may be the best way forward**
 - Focus conversation about Gateway in line with the needs of that ‘neighborhood’
 - For example residents in Port Coquitlam may need a conversation around construction, and delays
 - Residents in downtown Vancouver may require conversation around transit buses and sea bus

Communicating the benefits



- **Three key areas highlighted to focus on in terms of Gateway benefits**
 1. Economic benefit (personally)
 2. Mobility
 3. Concept quality of Life (via feeling connected and the emotive social benefit)
- **However credibility in providing such benefits will be a key challenge facing the GVGC and partners**
 - Current experiences of the Gateway have not always been positive
 - Residents want clear answers supported by evidence as to how the Gateway will benefit them
- **Focusing on the environment and any eco-friendly or green initiatives raises many comments in terms of credibility**
 - Environment discussions should be 'tick box' rather than key focus
- **Key ingredients for communicating the benefits:**
 - Economics & Commerce = personal economic benefit
 - Connection = mobility, freedom & easier connections
 - Community = Free time, time with family, time to enjoy the surroundings (emotional benefit)

Appendix

-

-

-

-

References

¹ Transport Canada.

“Canada’s Asia Pacific Gateway Corridor Initiative.” Transport Canada.

<http://www.tc.gc.ca/canadagateways/apgci/index.html> (11 January, 2009)

Definition and visuals provided for context

Canada's Pacific Gateway is a system of transportation infrastructure, including British Columbia Lower Mainland ports, road and rail connections that reach across Western Canada and into the economic heartlands of North America, as well as major airports and border crossings. It is also known as the **Asia-Pacific Gateway and Corridor**,¹



¹Transport Canada APCGI

Discussion Guide: Sections 1,2 & 3



GVGC
Awareness & Message Testing Research
Discussion Guide (2 hours)

1. Introductions (5 min)

- Explain research process
- Video / audio taping, cell phones off
- Looking for personal opinions based on their experience, no right or wrong answers
- Independent moderator, no connection to the sponsoring company

- Introductions around the table, what they like to do in their free time.

2. Awareness & Perceptions (10 min)

- When I say 'quality of life' what comes to mind? Record on flipchart and explore answers
- If we were to time travel 10 years into the future - how would you like to see your community improve? Why?
- Present topic of Canada's Pacific Gateway
- Briefly discuss top of mind awareness

3. Gateway Description (5 min)

Provide participants with description of the Gateway to read:

Canada's Pacific Gateway is a system of transportation infrastructure, including British Columbia Lower Mainland ports, road and rail connections that reach across Western Canada and into the economic heartlands of North America, as well as major airports and border crossings. It is also known as the Asia-Pacific Gateway and Corridor.

Show map here

- Overall reactions? (broad / general)
- Having seen the description – what are your thoughts on the Gateway now?
 - Record to flip chart and discuss
 - What's new? What did you already know?
 - What issues or concerns are raised? Why?
 - What questions are you left with?
 - How familiar are you with the concept of the Asia-Pacific Gateway and Corridor? Why?

Discussion Guide: Sections 4,5,& 6

4. Gateway Benefits/ Concerns (20 min)

- What do you perceive the benefits of the Gateway are?
 - To you? Your community?
 - The region? The province? Canada?
- To what extent do you feel our region is an important part of Canada's economic growth? Why?
 - Explore and discuss responses
- How do you feel connected to the Gateway?
 - Physically, economically, socially? Anything else?
 - Explore and discuss responses
- What concerns do you have about the Gateway?
 - Record on flipchart
 - To you? Your community?
 - The region? The province? Canada?
 - What's driving these concerns?
- What do you need to know to alleviate these concerns?
 - Discuss
 - What specifically needs to happen/be communicated/be addressed to overcome these barriers?

5. Revisiting the Future/ QOL (5 min)

Thinking back to our conversation on QOL – how can the Gateway help in achieving this

Thinking back to our 10-year look into the future

Revisit ideas on how participants would like to see the Gateway grow

- What specific actions would you like to see taken? Why?

6. Message Testing (30 min)

We are now going to look at a series of messages about the Gateway aimed at people like yourselves.

There are 12 messages placed around the room. Please get up, walk around and read all the messages. Allocate green dots to your preferred messages and red dots to the ones you dislike, and then stand by the one you are most drawn to

- Starting with the message with the most 'votes' - Briefly explore various reasons why the message was chosen? REPEAT FOR OTHER CHOSEN MESSAGES

Please sit down, I'd now like to spend some time discussing each message (start with top preferred messages, work down)

- Overall reactions/ initial impressions?
- Talk me through LIKES/ DISLIKES
- Message communicated?
- What benefits does it communicate about the Gateway? What's the value of that benefit?
- To what extent does it address any concerns raised earlier about the Gateway? (refer to flipchart on concerns) Why/ why not?
- Improvements?
- Comments on language used? MODERATOR: refer to key words list for additional prompting on language

REPEAT FOR REMAINING PREFERRED MESSAGES

FOR MESSAGES NOT CHOSEN IN VOTING EXERCISE:

- Why was this message not chosen?
- How could it be improved?

Thinking of all the messages seen here, please rank your top three preferred messages with 1st, 2nd, 3rd (Self completion 1)

Discussion Guide: Sections 7 & 8

MESSAGES TO BE TESTED:

- A. We are all a part of Canada's Pacific Gateway and together we all benefit from its success. The more competitive the Gateway is, the more opportunities we all have.
- B. The Gateway approach is about ensuring our region's transportation system works efficiently to reduce congestion, improve air quality and deliver the goods and services that make our lives better. It is about connections and efficient mobility.
- C. The Gateway approach is about safer, greener and easier trips throughout our region.
- D. Our region has always been a gateway for the movement of goods and people. This activity helps our communities thrive and succeed, and is critical to our future.
- E. A competitive, well-managed Gateway supports one in seven jobs in our region and it is essential to our future economic prosperity. It's our connection to opportunity.
- F. We all depend on the Gateway, which is why smart transportation improvements will ensure the Gateway continues to support a sustainable, livable region.
- G. The Gateway is critical to Canada's economic future and fundamental to the opportunities that we all enjoy in our region.
- H. Canada's Pacific Gateway improvements will allow us to move more freely throughout the region.
- I. Canada's Pacific Gateway will deliver benefits across Canada, B.C., and our region through skills development, well-paying jobs, quality of life and environmental improvements that will mean less time in our cars, less congestion, and greater safety.
- J. The Roberts Bank Rail Corridor is one example of the immediate benefits of strengthening Canada's Pacific Gateway, through quality of life and environmental benefits, such as improved air quality and decreased noise.
- K. Investment in Canada's Pacific Gateway system will boost the efficiency, enhance the safety and reduce greenhouse gas emissions within our region.
- L. British Columbia is North America's natural Gateway to the surging economies of the Asia-Pacific.

7. Bull's Eye (10 min)

The objective of these messages is to communicate value of the Gateway to all of us and its importance to our well-being now and in the future.

Bearing in mind all the messages we've looked at today which message(s) do you feel does this best? (participants to draw from GVGC and APCGI messages)

Present flip chart of bull's eye with communication objective in centre, assess how closely top messages achieve hitting the bull's eye

- Why does message X achieve the objective more closely? REPEAT AS APPROPRIATE
- If it does not hit centre, what's missing to get it there?

8. Key Words (10 min)

Present scatterboard of key words (self completion 3). Please circle the words that resonate most strongly when you think about the Gateway and the benefits you would like for you and your community

Discuss & explore the words:

- Initial impressions?
- Which words resonate? Which do not? (go through list)
- Any word missing that should be included?
- Relate back to earlier discussion on benefits/concerns – explore if words are answering/matching concerns/benefits raised?

KEY WORDS TO BE TESTED:

- | | |
|--------------------|------------------|
| 1. Growth | 10. Efficiency |
| 2. Expansion | 11. Prosperity |
| 3. Competitiveness | 12. Improvements |
| 4. Mobility | 13. Connection |
| 5. Integrated | |
| 6. Infrastructure | |
| 7. Livability | |
| 8. Quality of life | |
| 9. Sustainability | |

Discussion Guide: Sections 9 & 10

9. Building Blocks (5 min)

IF TIME REMAINS: Bearing in mind everything we discussed today (the ideal future for the region, the benefits the Gateway brings, the concerns the Gateway raises) – what are the ideal message ‘ingredients’ needed to:

- Raise awareness about the Gateway?
- Alleviate concerns?
- Communicate benefits?

10. Conclusion (2 min)

Cover any questions from the back room.

Thank & Close

Messages tested

- A. **We are all a part of Canada's Pacific Gateway and together we all benefit from its success. The more competitive the Gateway is, the more opportunities we all have.**
- B. **The Gateway approach is about ensuring our region's transportation system works efficiently to reduce congestion, improve air quality and deliver the goods and services that make our lives better. It is about connections and efficient mobility.**
- C. **The Gateway approach is about safer, greener and easier trips throughout our region.**
- D. **Our region has always been a gateway for the movement of goods and people. This activity helps our communities thrive and succeed, and is critical to our future.**
- E. **A competitive, well-managed Gateway supports one in seven jobs in our region and it is essential to our future economic prosperity. It's our connection to opportunity.**
- F. **We all depend on the Gateway, which is why smart transportation improvements will ensure the Gateway continues to support a sustainable, livable region.**
- G. **The Gateway is critical to Canada's economic future and fundamental to the opportunities that we all enjoy in our region.**
- H. **Canada's Pacific Gateway improvements will allow us to move more freely throughout the region.**
- I. **Canada's Pacific Gateway will deliver benefits across Canada, B.C., and our region through skills development, well-paying jobs, quality of life and environmental improvements that will mean less time in our cars, less congestion, and greater safety.**
- J. **The Roberts Bank Rail Corridor is one example of the immediate benefits of strengthening Canada's Pacific Gateway, through quality of life and environmental benefits, such as improved air quality and decreased noise.**
- K. **Investment in Canada's Pacific Gateway system will boost the efficiency, enhance the safety and reduce greenhouse gas emissions within our region.**
- L. **British Columbia is North America's natural Gateway to the surging economies of the Asia-Pacific.**

Taglines tested

- M. A stronger and sustainable future
- N. Choosing a sustainable future
- O. A smarter way to grow
- P. Our connection to opportunity
- Q. Safer, greener and easier trips throughout our region
- R. Our Gateway, Our Future
- S. Canada's Pacific Gateway is our region's future

Language tested

- **Livability**
- **Efficiency**
- **Growth**
- **Connection**
- **Integrated**
- **Expansion**
- **Competitiveness**
- **Improvements**
- **Quality of life**
- **Mobility**
- **Prosperity**
- **Sustainability**
- **Infrastructure**

8.0 Appendix B

TransLink Listens Online Survey Report

Prepared by TransLink
March 2009

Canada's Pacific Gateway Communications Testing

March 13, 2009

On-Line Survey of www.translinklistens.bc.ca Panelists

Background and Purpose



- TransLink, the South Coast British Columbia Transportation Authority, plans and funds the transportation network for Metro Vancouver, including roads and bridges, transit, cycling paths, rideshare programs and transportation demand management initiatives.
- As part of its mandate to facilitate goods movement, TransLink seeks to minimize the environmental impact of congestion and contribute to Metro Vancouver's economic prosperity.
- TransLink's management requires consumer feedback on the Asia-Pacific Gateway and Corridor Initiative, also known as **Canada's Pacific Gateway**.

Research Method



- On February 23, 2009, a total of 6,769 members of the www.translinklistens.bc.ca panel were invited to participate in the survey.
- By the close of the study on February 27, 2009, one third of the panelists (2,152) had participated. However, 53 were from outside the Metro Vancouver region so the results outlined here are based on the 2,099 eligible respondents.
- Ranges of error are not cited for panels because respondents select themselves for inclusion, unlike a telephone poll where respondents are randomly selected.
- The data reported has not been weighted on the basis of age, gender and main mode of transportation within Metro Vancouver. This means that a disproportionately high number of transit users are included in the sample, which may or may not have an effect on overall respondent's attitudes.
- Two questions which were originally part of the survey have not been reported on because of potential bias in the data set.

Summary



- Currently almost half of respondents (47%) are aware of Canada's Pacific Gateway (CPG).
- Respondents tend to place a high level of importance on all six of the perceived benefits of Canada's Pacific Gateway that were tested. About three out of four said the benefits were somewhat/very important.
- Panelists were asked about their level of concern with the potential impact the GPG would have on six areas (environment, population growth, security, congestion, cost of living, affordable housing). They are most concerned with the impact of the CPG on the environment (69% concerned) and congestion (65%) and least concerned with population growth (48%) and security (47%).
- Respondents were asked to rate their level of agreement with four statements about Canada's Pacific Gateway impact on the economy, employment, mobility and quality of life. The two strongest statements relate to economy and mobility. The weakest statement is the one relating to quality of life—viz., "CPG improves quality of life, reducing congestion and making trips safer." This is consistent with the results from the earlier question which found that two-thirds were concerned with the impact the CPG would have on congestion.

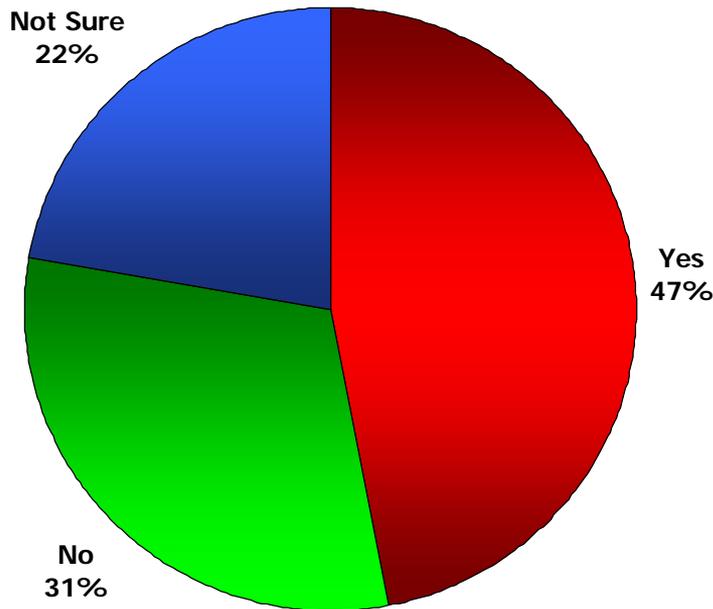


Detailed Findings

Awareness of Canada's Pacific Gateway



Q1. Have you ever heard of the Asia-Pacific Gateway and Corridor Initiative, otherwise known as Canada's Pacific Gateway?



- Almost half (47%) of the panelists participating in this research have heard of Canada's Pacific Gateway. One-in-five (22%) are not sure if they've heard of Canada's Pacific Gateway.
- Men (62%) are more aware of Canada's Pacific Gateway than women (34%).
- Panelists over the age of 55 are more aware (59%) than those from other age groups.
- Regionally the level of awareness is ranges from a low of 43% in Burnaby/New West to 52% in the Northeast Region (Tri-Cities, Maple-Meadows).

Detailed Knowledge of Canada's Pacific Gateway



Q2. Thinking of anything you may have seen or heard, what do you know about “Canada’s Pacific Gateway”? What else can you tell me about Canada’s Pacific Gateway?

Panelists who say they are aware of the CPG, seem very familiar with various aspects related to the Gateway (full list is available under separate cover):

- *Increasing port capacity. BC has the closer ports for Asian-North American trade. BC will continue to be a focal economic point. New and improved road infrastructure including the new Port Mann Bridge, Pitt River Bridge, SFPR, NFPR and widening of Highway 1.*
- *A movement to coordinate moving international goods.*
- *A project to help the flow of goods into and out of the greater Vancouver area, the project will see a ring road built around the areas and the building of new bridges and highways, twinning the 401*
- *An effort by political leaders to increase Asian trade between Asia and BC both ways. However with an eye to an avenue to all of North America to use BC as their preferred gateway.*
- *I think I heard it involves strengthening certain transportation routes throughout Metro Vancouver to make them more suitable for trade, such as creating perimeter roads and increasing port capacity.*
- *It is very expensive and encourages road and port infrastructure, rather than public transport. I think it is environmentally unsustainable and encourages sprawl.*
- *It has to do with trade between us and Asia and making goods move quickly.*
- *It includes the construction of a new roadway (South Fraser Perimeter Rd.) linking Highway #1 and Tsawwassen.*
- *It has upset many farmers, it will have a huge impact on Burns Bog and add more truck traffic to our already overworked roads.*

Perceived Benefits of Canada's Pacific Gateway

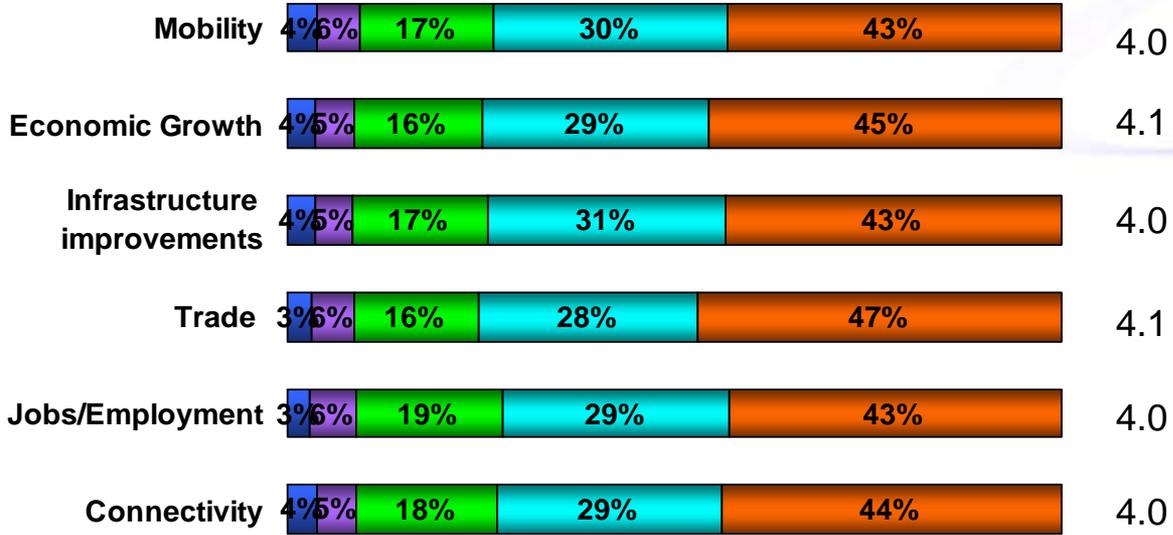


Q3. Based on your understanding of Canada's Pacific Gateway, how important are the following perceived benefits provided by the Gateway?

Not at all important Very Important



Average Score

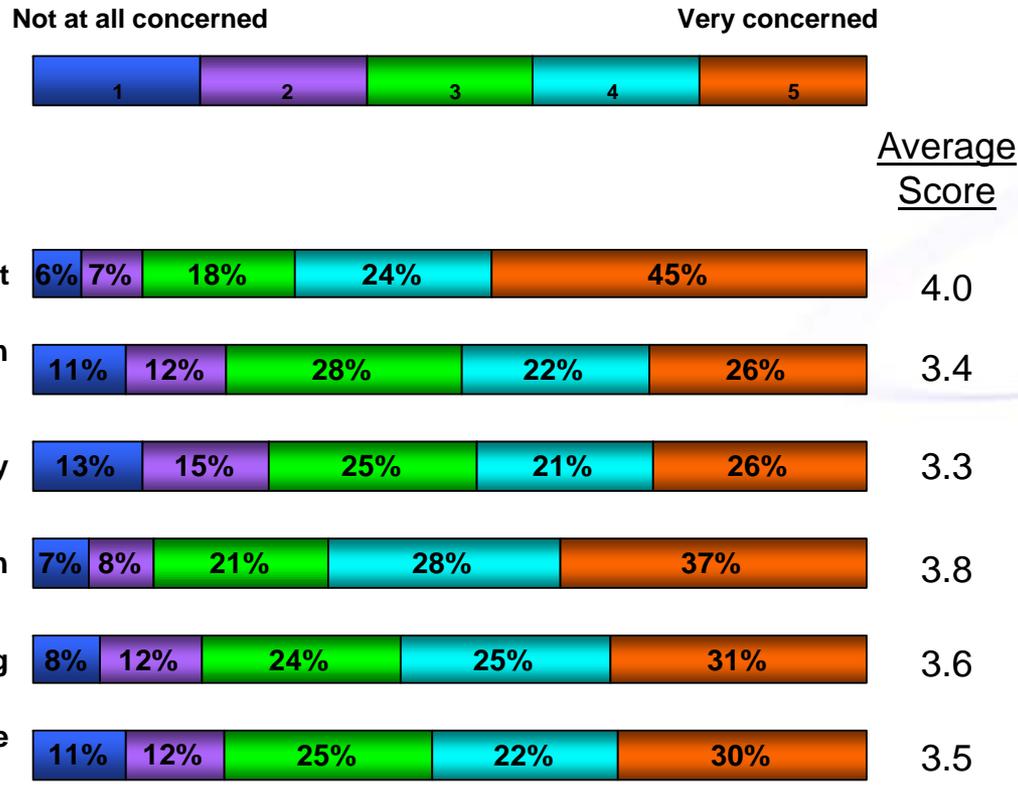


- Respondents place relatively high levels of importance on all the perceived benefits of Canada's Pacific Gateway (CPG). In all cases close to three-quarters or more rated the perceived benefits a 4 or 5 out of 5 (i.e., somewhat or very important).
- As reflected by the average ratings, the proportion who don't feel the perceived benefits of the CPG are important is small and doesn't vary across each of the statements.

Concerns with the Potential Impact of Canada's Pacific Gateway



Q4. How concerned are you with the potential impact the Gateway may have on the following areas?



- The greatest concern was shown for the Environment (69% concerned; average of 4 out of 5) followed by Congestion (65% concerned).
- The two potential impacts of least concern are Population Growth (48% concerned) and Security (47%).

n=2,099

Attitudes Towards Messaging Statements



Q6. Please tell us whether you agree or disagree with the following statements.

Strongly Disagree

Strongly agree



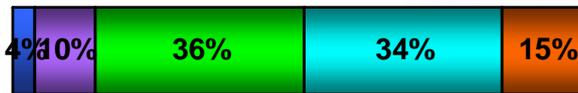
Average
Score

Canada's Pacific Gateway is important to our region's economy and future prosperity.



3.7

Canada's Pacific Gateway supports employment throughout our region, delivering opportunity



3.5

Canada's Pacific Gateway increases mobility in our region, allowing people and goods to move more freely.



3.6

Canada's Pacific Gateway improves our quality of life, reducing congestion and making trips safer.



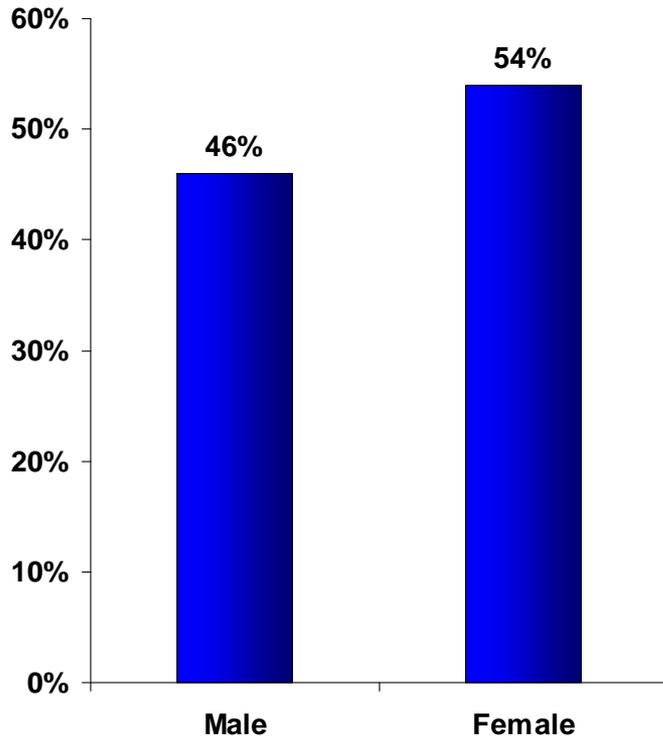
3.0

- Based on the average ratings, all except the last statement have similar levels of agreement amongst respondents (scores range from 3.5 to 3.7 out of 5).
- Focusing only on those who agree (4 or 5 out of 5), then the 1st and 3rd statements are the strongest with agreement from about 60% in both cases.
- The weakest statement is the last one, which has the highest proportion who disagree (28%) with it and the lowest who agree (33%).



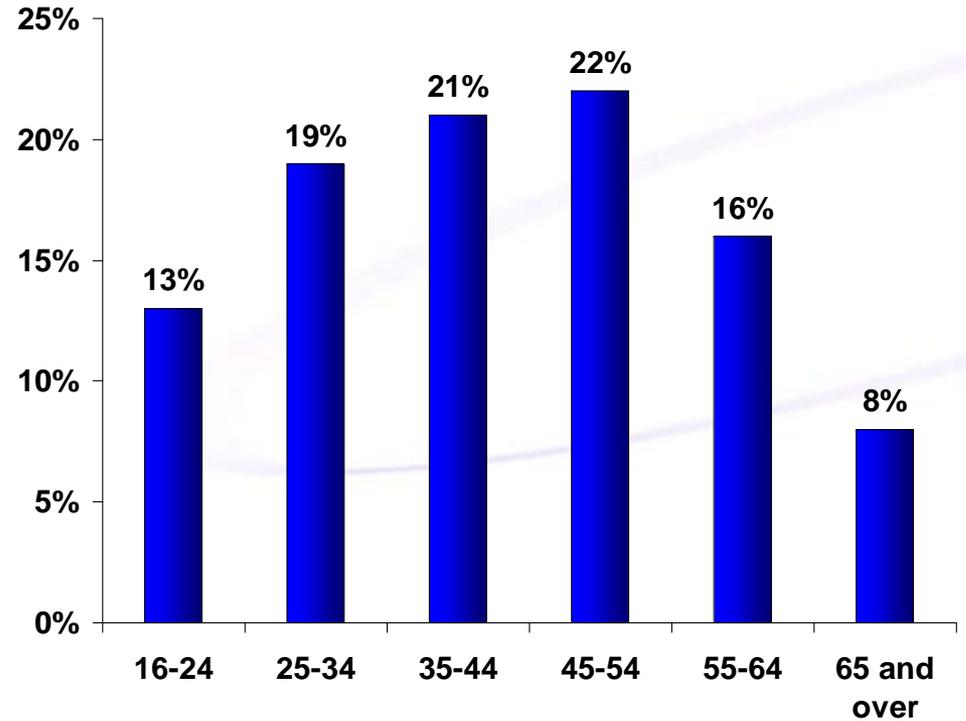
Respondent Profile

Gender



All Respondents (n=2,099)

Age

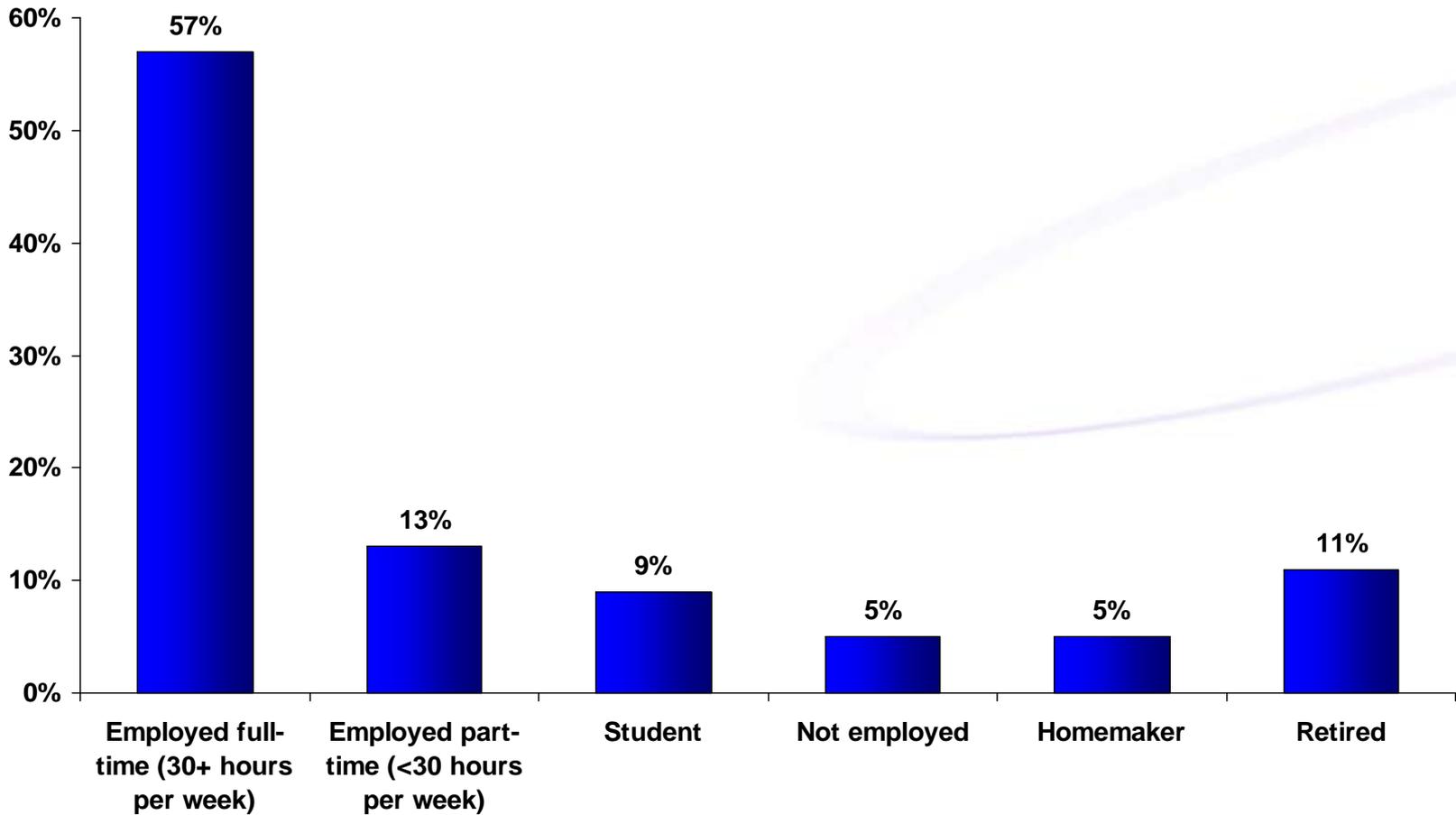


All Respondents (n=2,099)



Respondent Profile (continued)

Employment Status

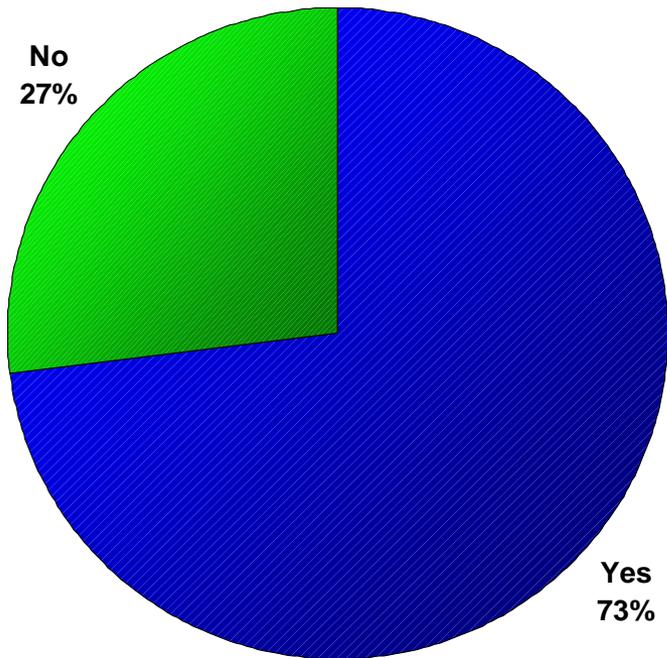


All Respondents (n=2,099)



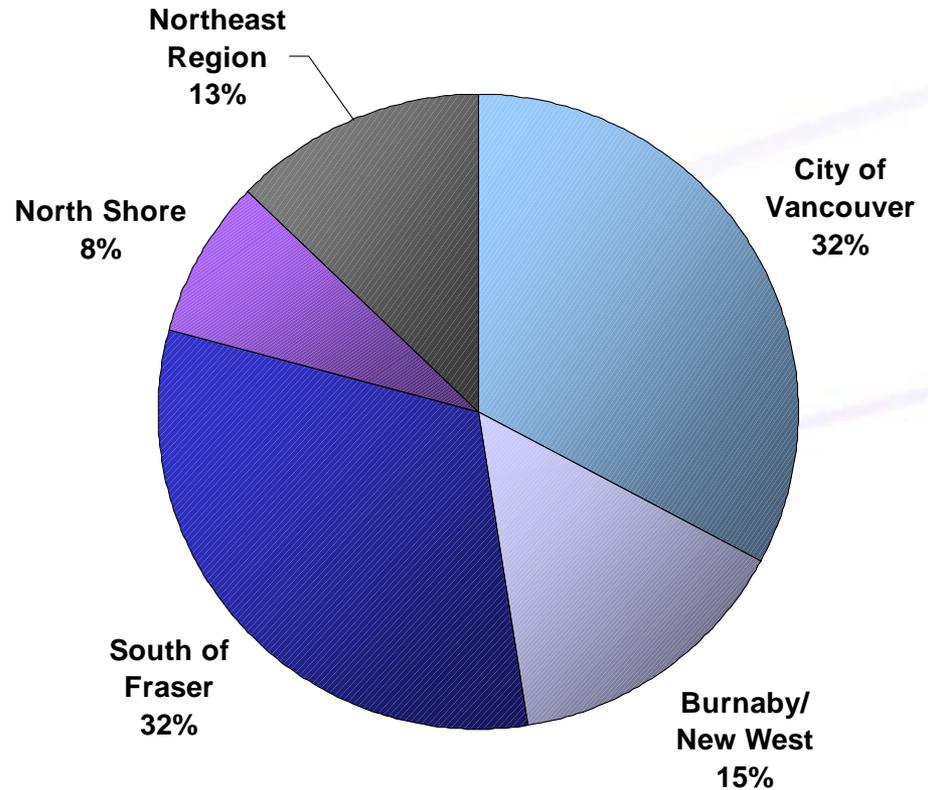
Respondent Profile (continued)

Access to a Vehicle on a Regular Basis



All Respondents (n=2,099)

Area of Residence



All Respondents (n=2,099)



Respondent Profile (continued)

Main Mode of Transportation

