



Forward positive perspective in economic strength softens in first quarter

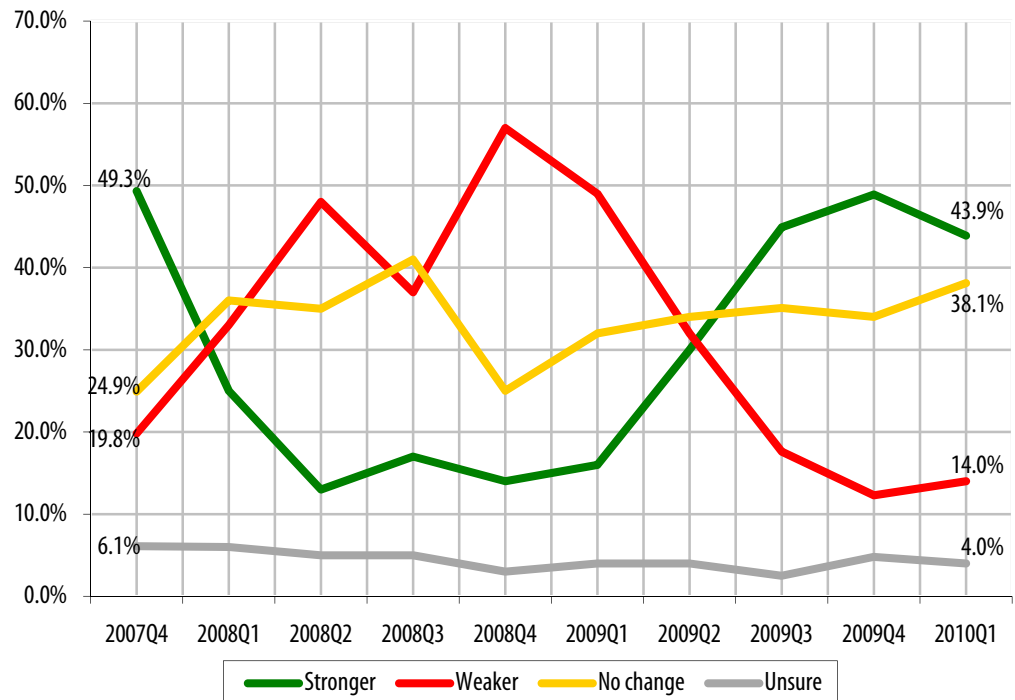
METHODOLOGY

To follow is a review of the latest Nanos national random telephone survey of 1,000 Canadians 18 years of age and older. It was completed between March 6th and March 12th, 2010. The statistics of a random sample of 1,000 respondents is accurate to within 3.1 percentage points, 19 times out of 20. The margin of accuracy will be wider for sub samples. Percentages may exceed 100 due to rounding.

Results for 2009Q4 are from a random telephone survey of 1,003 Canadians conducted between December 10th and December 13th, 2009.

The research was registered with the Marketing Research and Intelligence Association of which Nanos is a Gold Seal Corporate member.

QUESTION: In the next six months, do you think the Canadian economy will become stronger, weaker or will there be no change?



CANADIAN ECONOMY

| Response (%) ** | Canada | | Atlantic Canada* | | Quebec | | Ontario | | Prairies | | British Columbia | |
|--------------------------------|----------|----------|------------------|---------|---------|---------|---------|---------|----------|---------|------------------|---------|
| | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 |
| | (n=1000) | (n=1003) | (n=100) | (n=102) | (n=250) | (n=251) | (n=300) | (n=300) | (n=200) | (n=200) | (n=150) | (n=150) |
| | % | % | % | % | % | % | % | % | % | % | % | % |
| Stronger | 43.9 | 48.9 | 45.5 | 49.2 | 32.3 | 34.5 | 45.5 | 55.4 | 51.5 | 53.7 | 49.2 | 53.7 |
| Weaker | 14.0 | 12.3 | 6.5 | 18.5 | 16.7 | 12.3 | 17.0 | 11.2 | 9.7 | 10.4 | 14.2 | 13.1 |
| There will be no change | 38.1 | 34.0 | 45.7 | 29.2 | 48.1 | 46.8 | 33.9 | 28.8 | 33.9 | 31.3 | 30.1 | 29.8 |
| Unsure | 4.0 | 4.8 | 2.3 | 3.1 | 2.9 | 6.5 | 3.6 | 4.7 | 4.9 | 4.6 | 6.5 | 3.4 |
| Accuracy | ±3.1 | ±3.1 | ±10.0 | ±9.9 | ±6.3 | ±6.3 | ±5.7 | ±5.7 | ±7.0 | ±7.0 | ±8.1 | ±8.1 |

* Note: Small sample size

**Note: Percentages may not add up to 100 due to rounding

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Positive attitudes toward real estate, strong but soften in first quarter

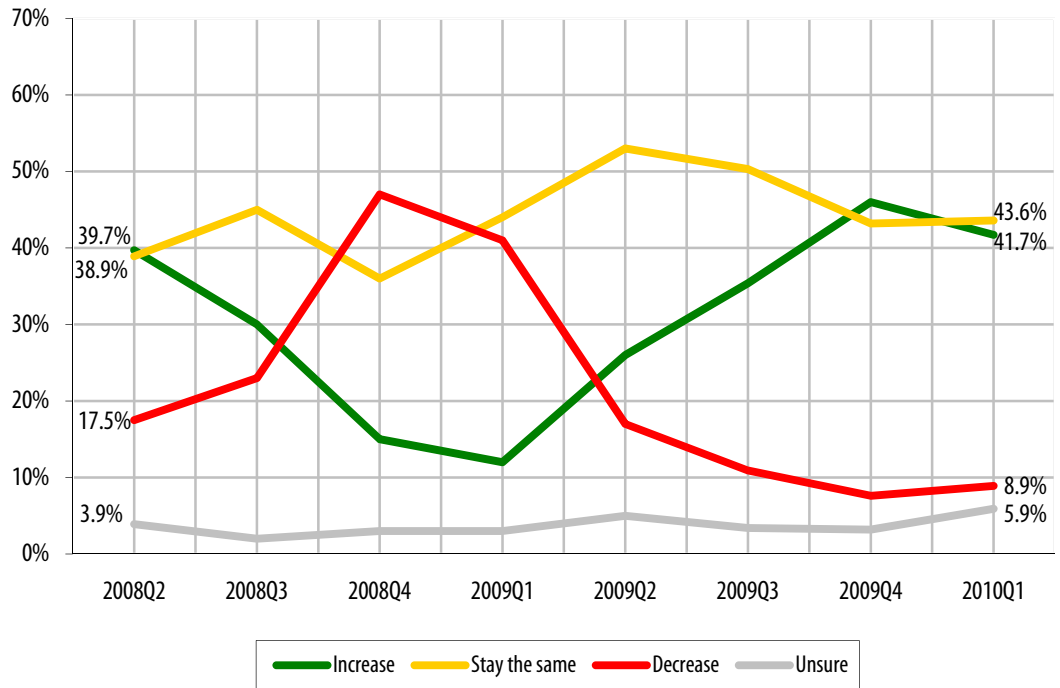
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QUESTION: In the next six months, do you believe that the value of real estate in your neighbourhood will increase, stay the same or decrease?



REAL ESTATE VALUE

| Response(%)** | Canada | | Atlantic Canada* | | Quebec | | Ontario | | Prairies | | British Columbia | |
|----------------------|----------|----------|------------------|---------|---------|---------|---------|---------|----------|---------|------------------|---------|
| | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 |
| | (n=1000) | (n=1003) | (n=100) | (n=102) | (n=250) | (n=251) | (n=300) | (n=300) | (n=200) | (n=200) | (n=150) | (n=150) |
| | % | % | % | % | % | % | % | % | % | % | % | % |
| Increase | 41.7 | 46.0 | 38.3 | 43.7 | 40.1 | 39.1 | 43.2 | 49.1 | 39.6 | 52.7 | 46.6 | 44.0 |
| Stay the same | 43.6 | 43.2 | 48.9 | 42.9 | 48.0 | 49.4 | 39.2 | 39.7 | 45.3 | 38.6 | 39.0 | 45.9 |
| Decrease | 8.9 | 7.6 | 8.8 | 11.5 | 6.7 | 7.8 | 10.4 | 7.3 | 9.9 | 6.6 | 8.1 | 6.8 |
| Unsure | 5.9 | 3.2 | 4.0 | 2.0 | 5.3 | 3.7 | 7.2 | 3.9 | 5.2 | 2.1 | 6.3 | 3.3 |
| Accuracy | ±3.1 | ±3.1 | ±10.0 | ±9.9 | ±6.3 | ±6.3 | ±5.7 | ±5.7 | ±7.0 | ±7.0 | ±8.1 | ±8.1 |

* Note: Small sample size - readers should exercise caution.

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Better-worse off gap closes

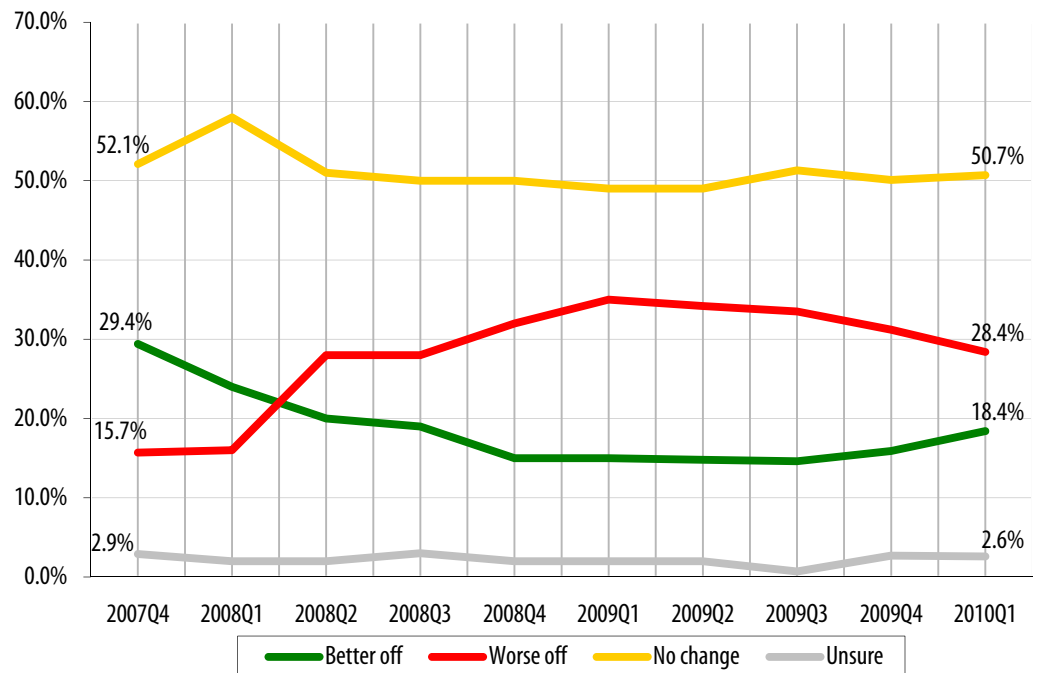
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QUESTION: Thinking of your personal finances, are you better off, worse off or has there been no change over the past year?



PERSONAL FINANCES

| Response (%) ** | Canada | | Atlantic Canada* | | Quebec | | Ontario | | Prairies | | British Columbia | |
|-------------------|----------|----------|------------------|---------|---------|---------|---------|---------|----------|---------|------------------|---------|
| | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 |
| | (n=1000) | (n=1003) | (n=100) | (n=102) | (n=250) | (n=251) | (n=300) | (n=300) | (n=200) | (n=200) | (n=150) | (n=150) |
| | % | % | % | % | % | % | % | % | % | % | % | % |
| Better off | 18.4 | 15.9 | 22.3 | 15.4 | 16.4 | 16.5 | 20.9 | 12.8 | 17.4 | 19.5 | 15.2 | 16.7 |
| Worse off | 28.4 | 31.2 | 30.4 | 25.7 | 24.4 | 29.2 | 30.4 | 35.7 | 32.5 | 24.2 | 24.0 | 38.7 |
| No change | 50.7 | 50.1 | 47.3 | 54.6 | 57.4 | 53 | 44.1 | 49.8 | 47.5 | 51.4 | 59.2 | 41.3 |
| Unsure | 2.6 | 2.7 | 0.0 | 4.2 | 1.9 | 1.3 | 4.6 | 1.7 | 2.6 | 4.9 | 1.6 | 3.2 |
| Accuracy | ±3.1 | ±3.1 | ±10.0 | ±9.9 | ±6.3 | ±6.3 | ±5.7 | ±5.7 | ±7.0 | ±7.0 | ±8.1 | ±8.1 |

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Canadians' appetite for personal debt steady

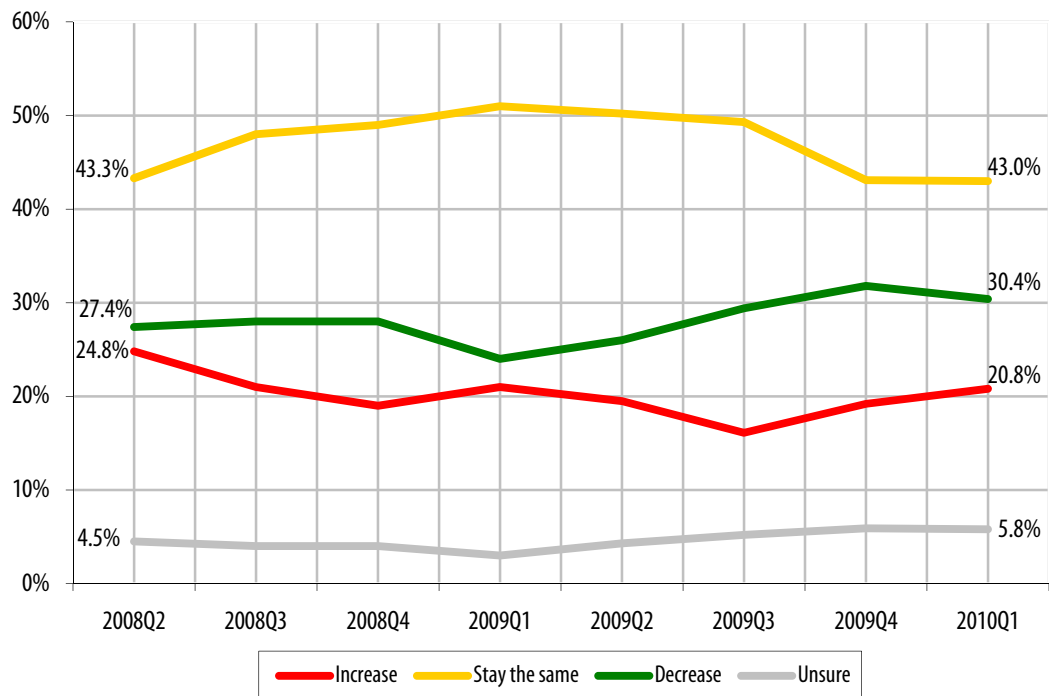
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QUESTION: In the next six months, do you believe that your personal debt will increase, stay the same or decrease?



PERSONAL DEBT

| Response (%)** | Canada | | Atlantic Canada* | | Quebec | | Ontario | | Prairies | | British Columbia | |
|----------------------|----------|----------|------------------|---------|---------|---------|---------|---------|----------|---------|------------------|---------|
| | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 |
| | (n=1000) | (n=1003) | (n=100) | (n=102) | (n=250) | (n=251) | (n=300) | (n=300) | (n=200) | (n=200) | (n=150) | (n=150) |
| | % | % | % | % | % | % | % | % | % | % | % | % |
| Increase | 20.8 | 19.2 | 24.9 | 19.1 | 15.1 | 16.6 | 23.3 | 22.2 | 21.9 | 18.2 | 21.1 | 18.7 |
| Stay the same | 43.0 | 43.1 | 34.4 | 41.3 | 53.9 | 55 | 43.3 | 39.9 | 37.3 | 38.5 | 38.0 | 37.1 |
| Decrease | 30.4 | 31.8 | 34.5 | 32.4 | 26.7 | 25.7 | 28.0 | 32.5 | 34.6 | 36.4 | 32.9 | 34.2 |
| Unsure | 5.8 | 5.9 | 6.1 | 7.2 | 4.4 | 2.8 | 5.4 | 5.4 | 6.2 | 6.8 | 8.0 | 10 |
| Accuracy | ±3.1 | ±3.1 | ±10.0 | ±9.9 | ±6.3 | ±6.3 | ±5.7 | ±5.7 | ±7.0 | ±7.0 | ±8.1 | ±8.1 |

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Intensity of job security slides

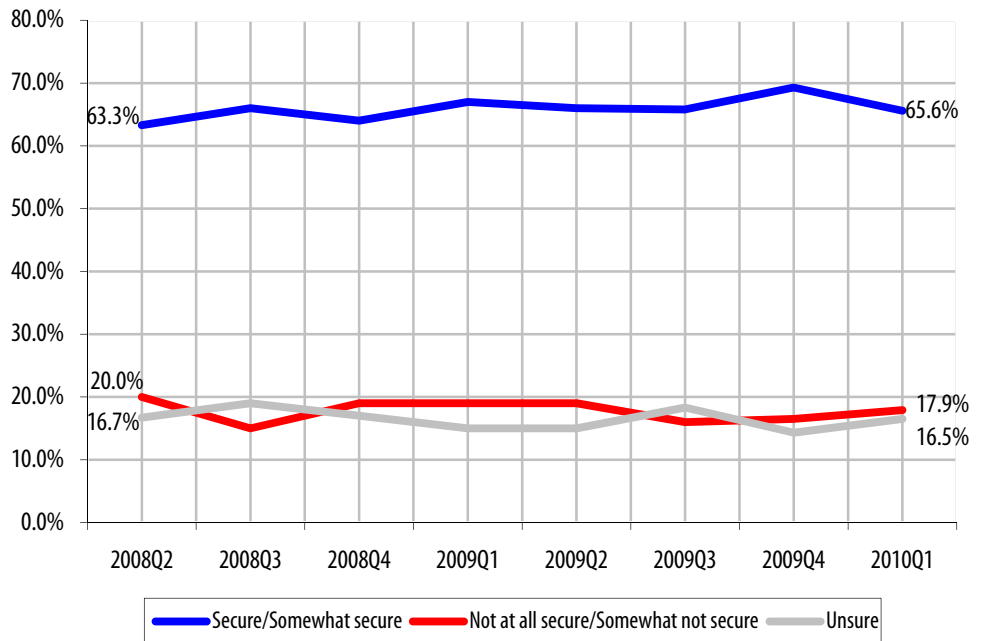
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QUESTION: Would you describe your job, at this time, as secure, somewhat secure, somewhat not secure or not at all secure?



JOB SECURITY

| Response (%)** | Canada | | Atlantic Canada* | | Quebec | | Ontario | | Prairies | | British Columbia | |
|----------------------------|----------|----------|------------------|---------|---------|---------|---------|---------|----------|---------|------------------|---------|
| | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 | 2010Q1 | 2009Q4 |
| | (n=1000) | (n=1003) | (n=100) | (n=102) | (n=250) | (n=251) | (n=300) | (n=300) | (n=200) | (n=200) | (n=150) | (n=150) |
| | % | % | % | % | % | % | % | % | % | % | % | % |
| Secure | 46.4 | 50.4 | 49.0 | 49 | 41.6 | 44 | 47.8 | 53.3 | 52.4 | 58 | 42.1 | 46 |
| Somewhat secure | 19.2 | 18.9 | 18.5 | 21.8 | 17.0 | 17 | 20.0 | 19.2 | 19.5 | 16 | 21.0 | 23.4 |
| Somewhat not secure | 4.3 | 5.6 | 10.0 | 1.2 | 3.6 | 8.3 | 2.6 | 6.3 | 5.7 | 4.6 | 3.2 | 3.8 |
| Not at all secure | 13.6 | 10.9 | 6.6 | 9 | 20.2 | 20.7 | 13.9 | 8.2 | 8.4 | 4.4 | 13.7 | 9.7 |
| Unsure | 16.5 | 14.3 | 15.9 | 19 | 17.6 | 10 | 15.7 | 13.1 | 14.0 | 16.9 | 20.1 | 17.1 |
| Accuracy | ±3.1 | ±3.1 | ±10.0 | ±9.9 | ±6.3 | ±6.3 | ±5.7 | ±5.7 | ±7.0 | ±7.0 | ±8.1 | ±8.1 |

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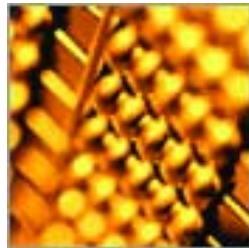
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- Online Surveys
- eDeliberative Polling and Online Dialogue
- Focus Groups
- Elite in-depth interviews
- Mystery Shopping
- Management Consulting



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