

PUBLIC PERSPECTIVES



SHIFTING SANDS MOVING INTO 2017

Canadians Assess the Economy,
Personal Finances, and Their Top Issues

JANUARY 2017



GENERAL THEMES FROM THE DATA ARE...

CANADIANS BECOMING MORE SKEPTICAL OF COUNTRY DIRECTION AND ECONOMIC CONDITIONS MOVING INTO 2017

Almost half (49%) of Canadians believe that the country is on the right track. This is considerably higher than in most other countries, including the US (37%), the UK (36%), and Italy (17%). It is however, a decrease for Canada of a full 9 percentage points from the end of 2016.

Following on the heels of events such as Brexit and the Trump victory, this kind of global environment suggests the potential for continued political upheaval and change in many countries for 2017. Especially since a majority in almost all countries, including Canada, feel the system is rigged to favour the rich and powerful.

Furthermore, in Canada positive assessment of the national economy is down 9 percentage points (to 52%) since the end of 2016, while assessments of regional economies are down 6 percentage points (to 36%). Economic conditions will clearly be an important determinant of political stability in Canada throughout 2017.

POTENTIAL FOR SIGNIFICANT PROVINCIAL AND DEMOGRAPHIC DISAGREEMENT ON ISSUE PRIORITIES AND DIRECTION

There are some stark differences in economic assessments and perceived national issue priorities which have the potential to divide interests of Canadians.

For example, healthcare is a top national issue in Quebec and Atlantic Canada, while taxes are the top issue in the Prairies and Ontario, poverty/social inequality is in the number one position in BC, and unemployment/jobs ranks as the key issue in Alberta. Climate change emerges as a top 5 ranked issue in BC and among Millennials, but in no other region or demographic.

Needless to say, government will be challenged to build widespread regional and demographic consensus on the priority issues for moving the country forward in 2017.

Contents

04

Country Direction and Potential for Instability

12

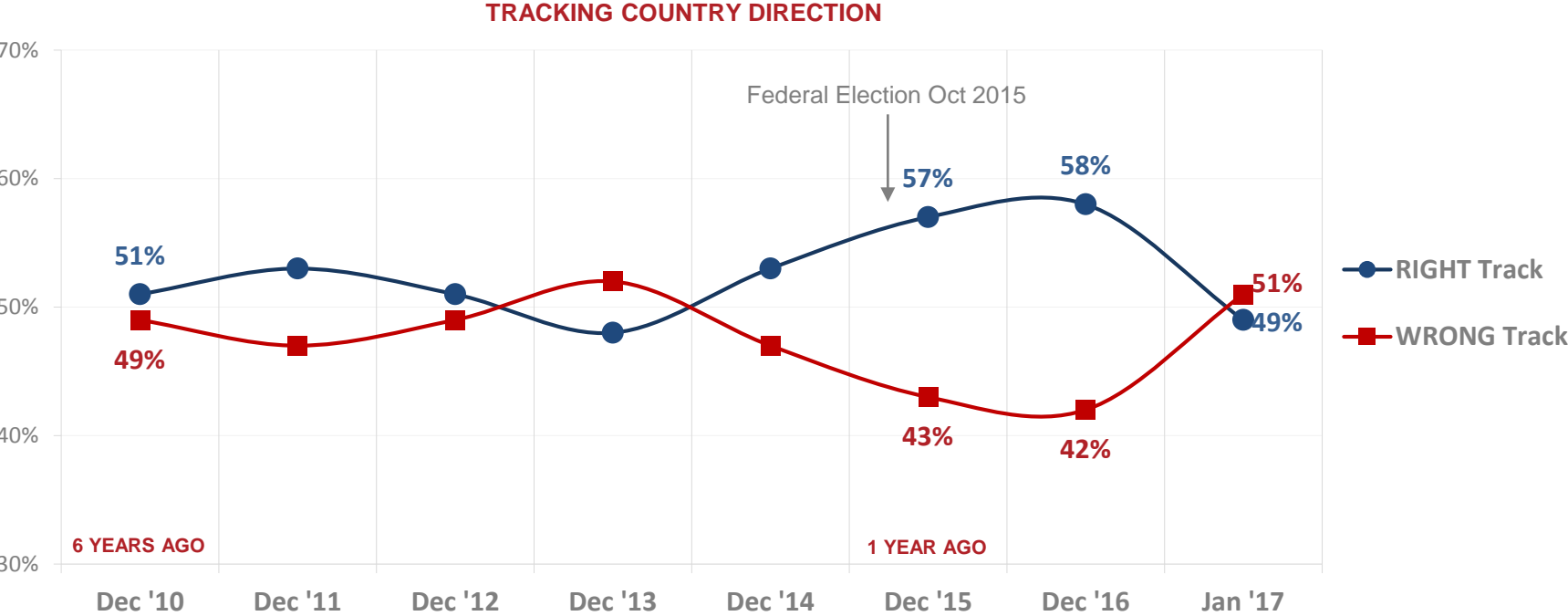
Economic Assessments

20

Important National Issues

COUNTRY DIRECTION AND POTENTIAL FOR INSTABILITY

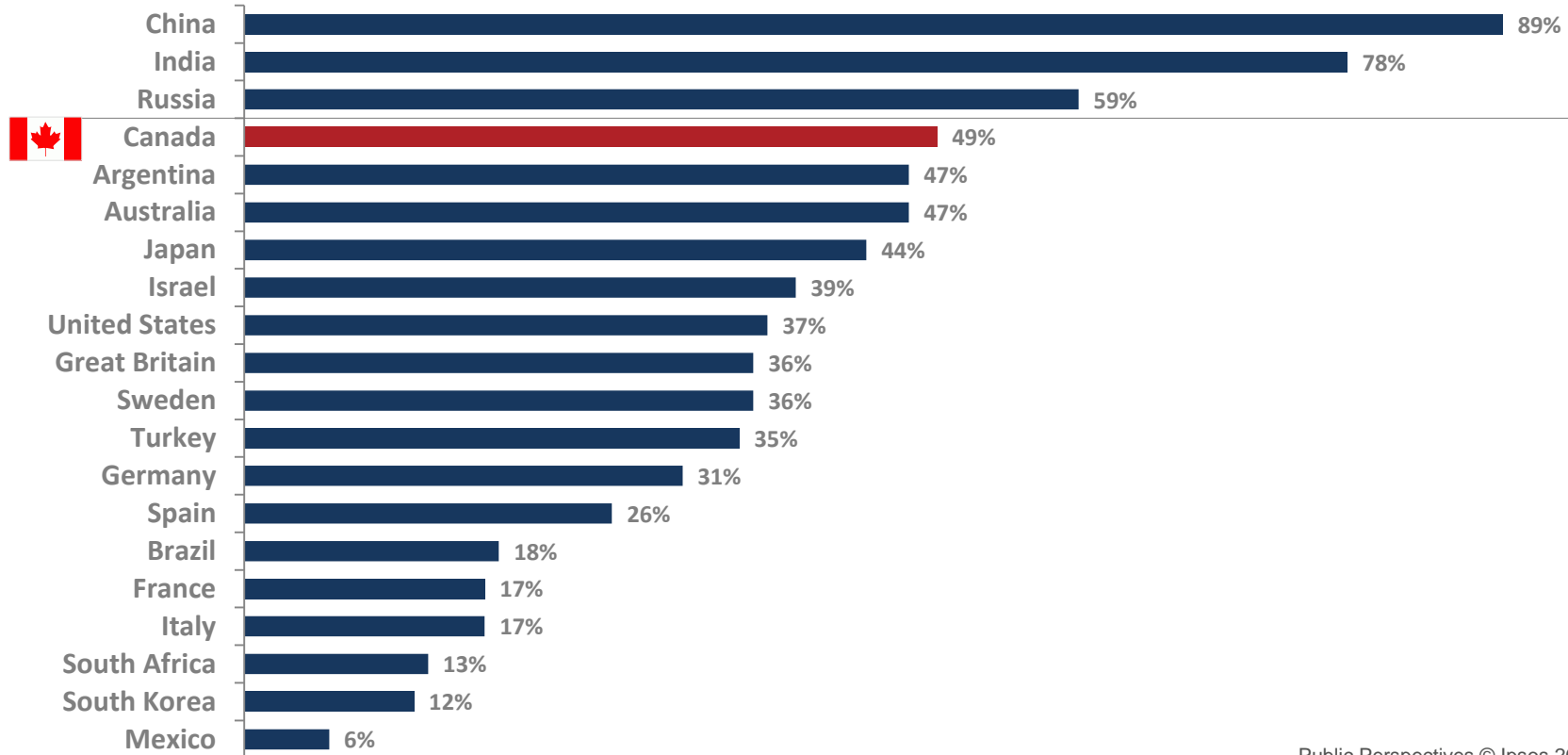
After growing optimism over the last couple of years, Canadians are entering 2017 increasingly skeptical that the country is on the right track



Generally speaking, would you say things in this country are heading in the right direction, or are they off on the wrong track?

Canadians more likely than others to believe their country is on the right track, behind majorities in just three others: China, India and Russia

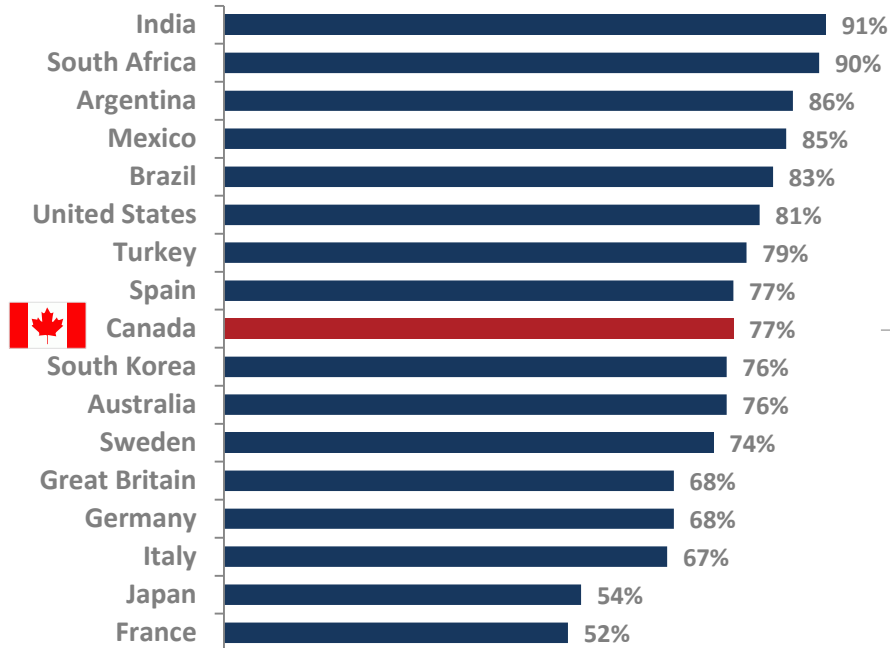
COUNTRY ON RIGHT TRACK (Jan '17)



Majority optimistic for personal life in 2017 across all countries; however, many are pessimistic for future generations

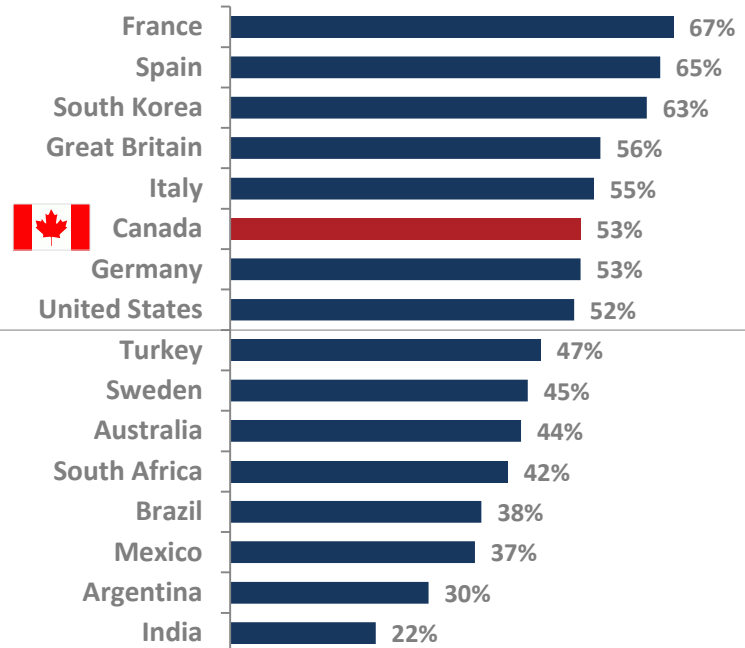
“I AM OPTIMISTIC THAT 2017 WILL BE BETTER FOR ME THAN 2016 WAS”

(% strongly/somewhat agree)



“TO WHAT EXTENT DO YOU FEEL THAT TODAY’S YOUTH WILL HAVE HAD A BETTER OR WORSE LIFE THAN THEIR PARENTS’ GENERATION, OR WILL IT HAVE BEEN ABOUT THE SAME?”

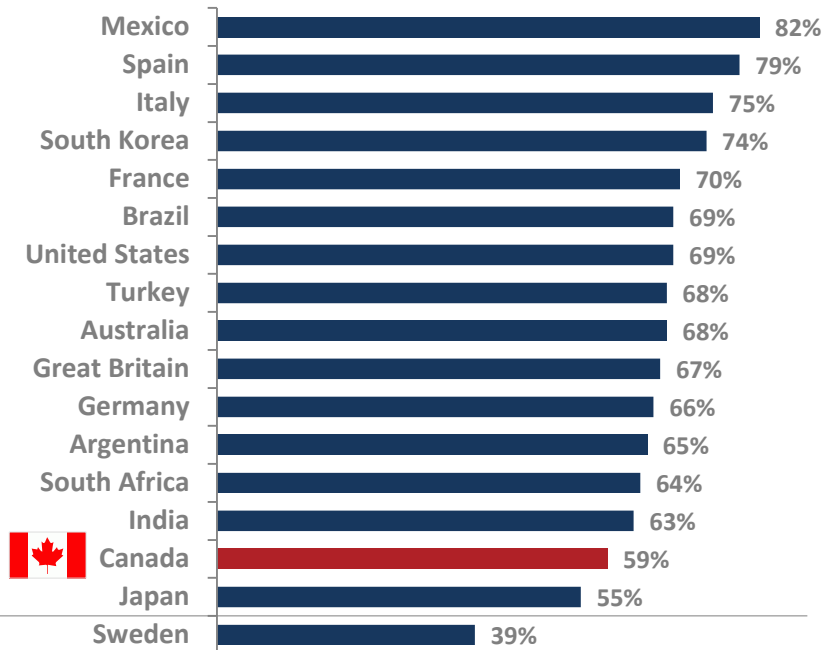
(% slightly/much worse)



Majority in all countries but Sweden feel the system favours the rich and powerful; most countries feel politicians don't care about them

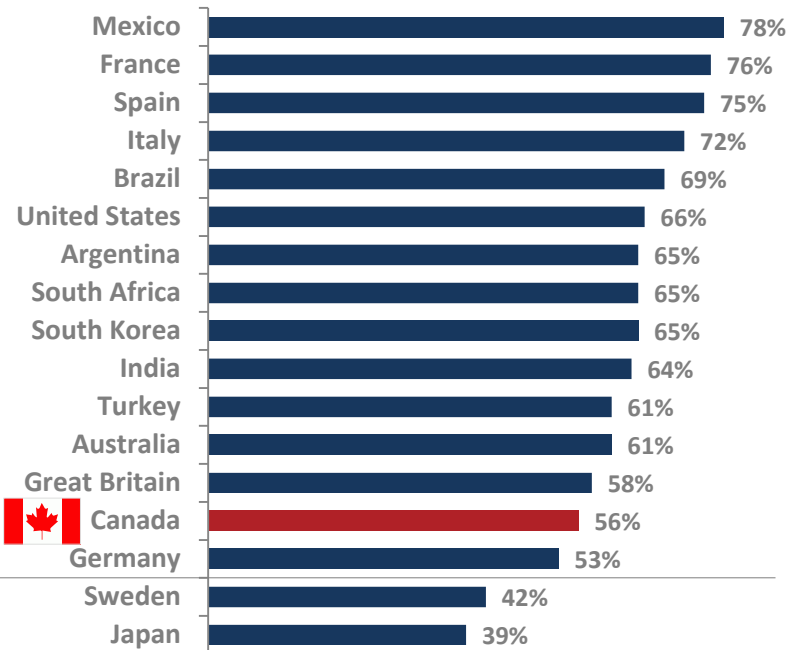
“THE [COUNTRY’S] ECONOMY IS RIGGED TO THE ADVANTAGE THE RICH AND POWERFUL”

(% strongly/somewhat agree)



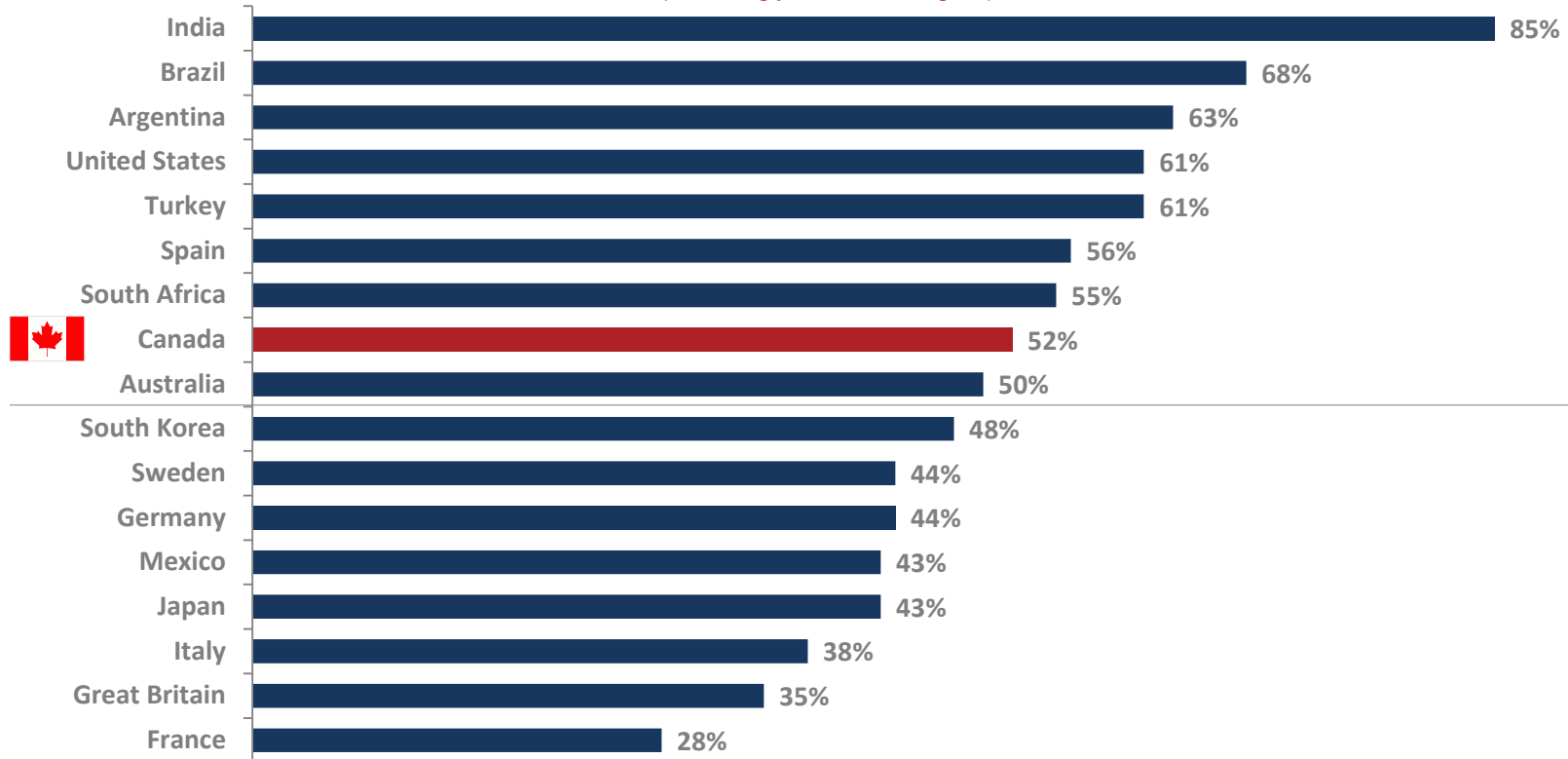
“TRADITIONAL PARTIES AND POLITICIANS DON’T CARE ABOUT PEOPLE LIKE ME”

(% strongly/somewhat agree)



Expectations are mixed for the global economy in 2017

“THE GLOBAL ECONOMY WILL BE STRONGER IN 2017 THAN IT WAS IN 2016”
(% strongly/somewhat agree)

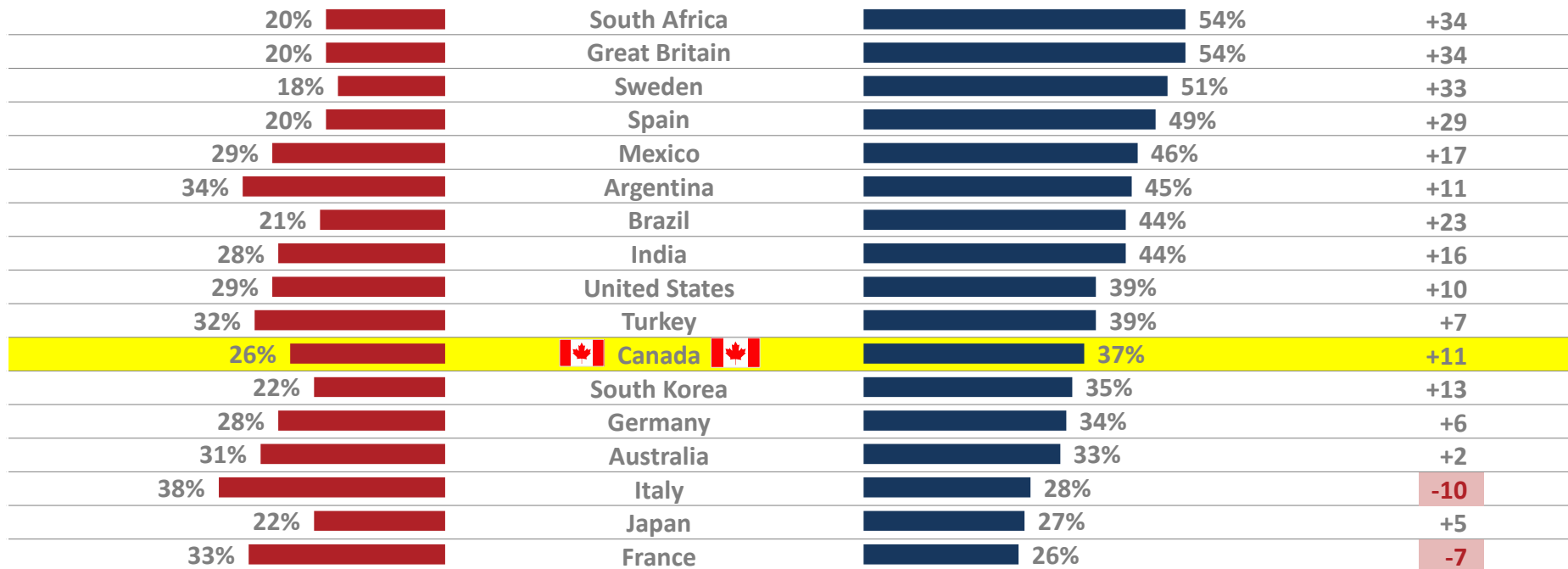


More people (including in Canada), view globalization as an opportunity rather than a threat, except in Italy and France

Opening up [country's] economy to foreign businesses and foreign trade is a **threat** to [your country]

Opening up [country's] economy to foreign businesses and foreign trade is an **opportunity** for [your country]

Net % Opportunity minus % Threat

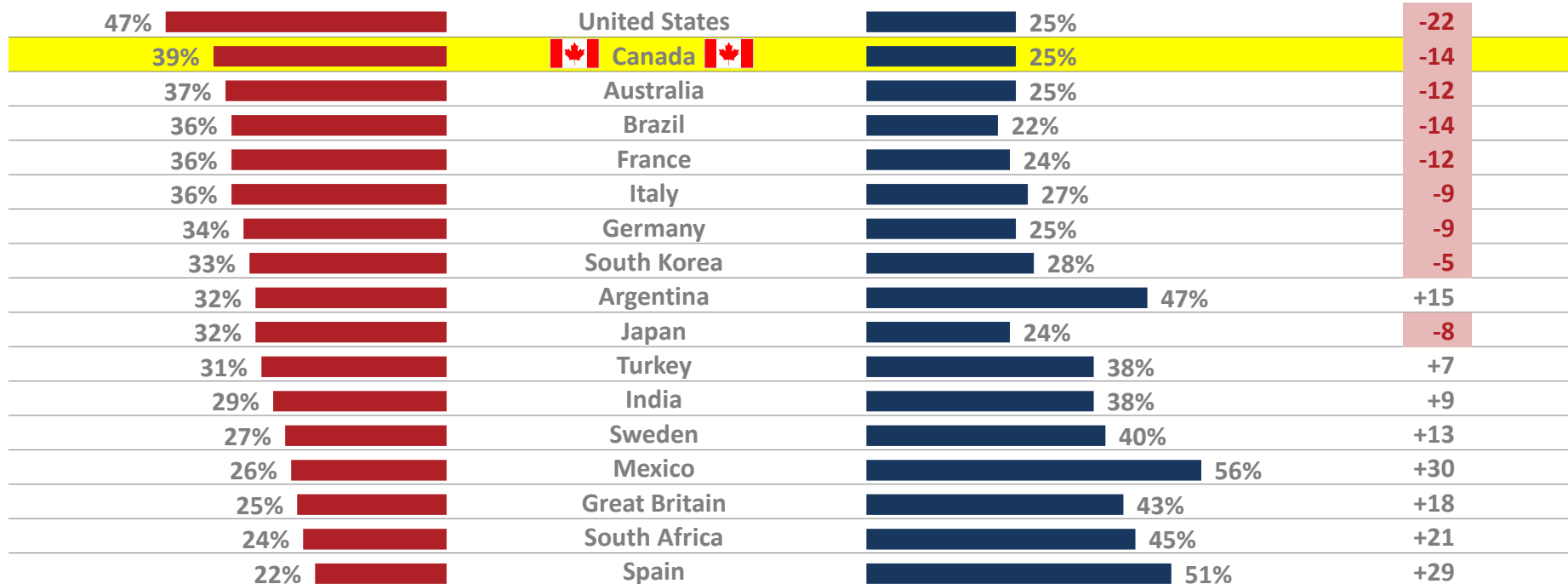


However, Canada and the US are most likely to agree that their countries should protect themselves vs. open up to the world

Agree most that [country] needs to take more steps to **protect itself** from today's world

Agree most that [country] needs to take more steps to **open itself up** to today's world

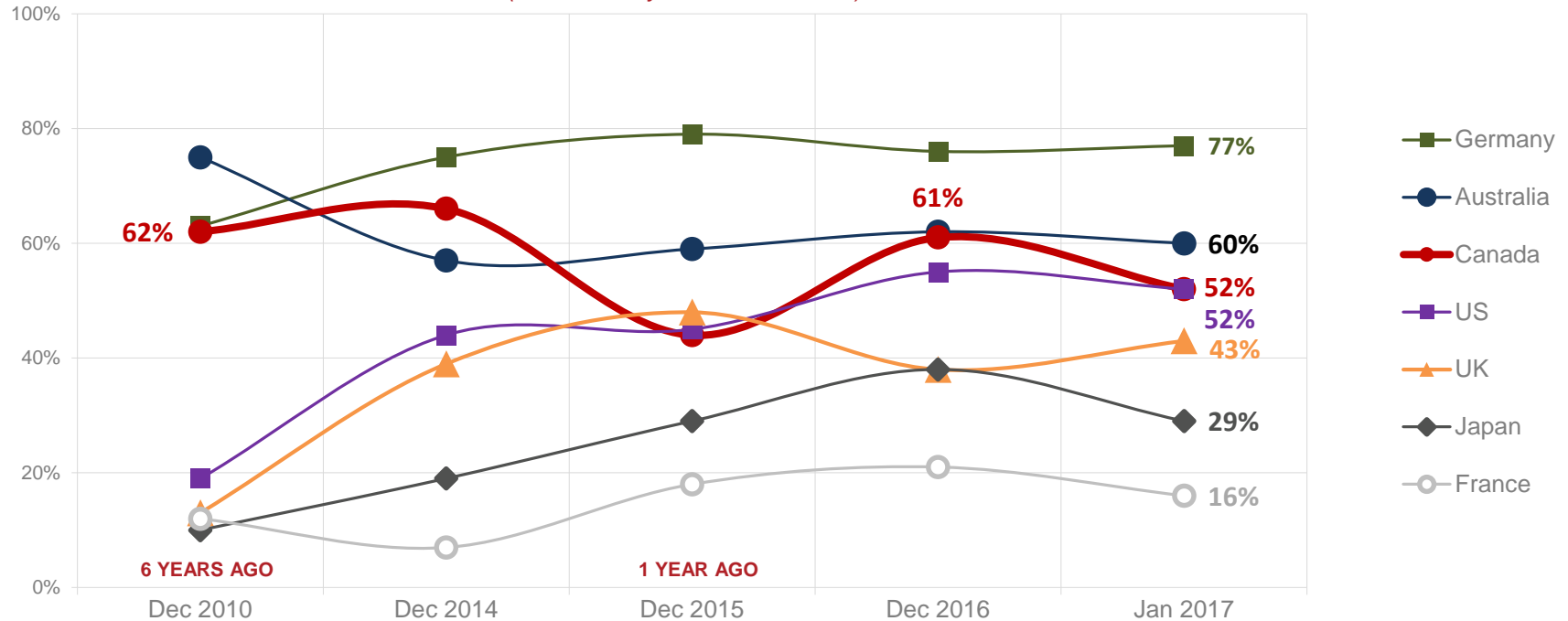
Net % Open minus % Protect



ECONOMIC ASSESSMENTS

After improving over the past year, Canadians' assessment of the national economy has declined coming into 2017

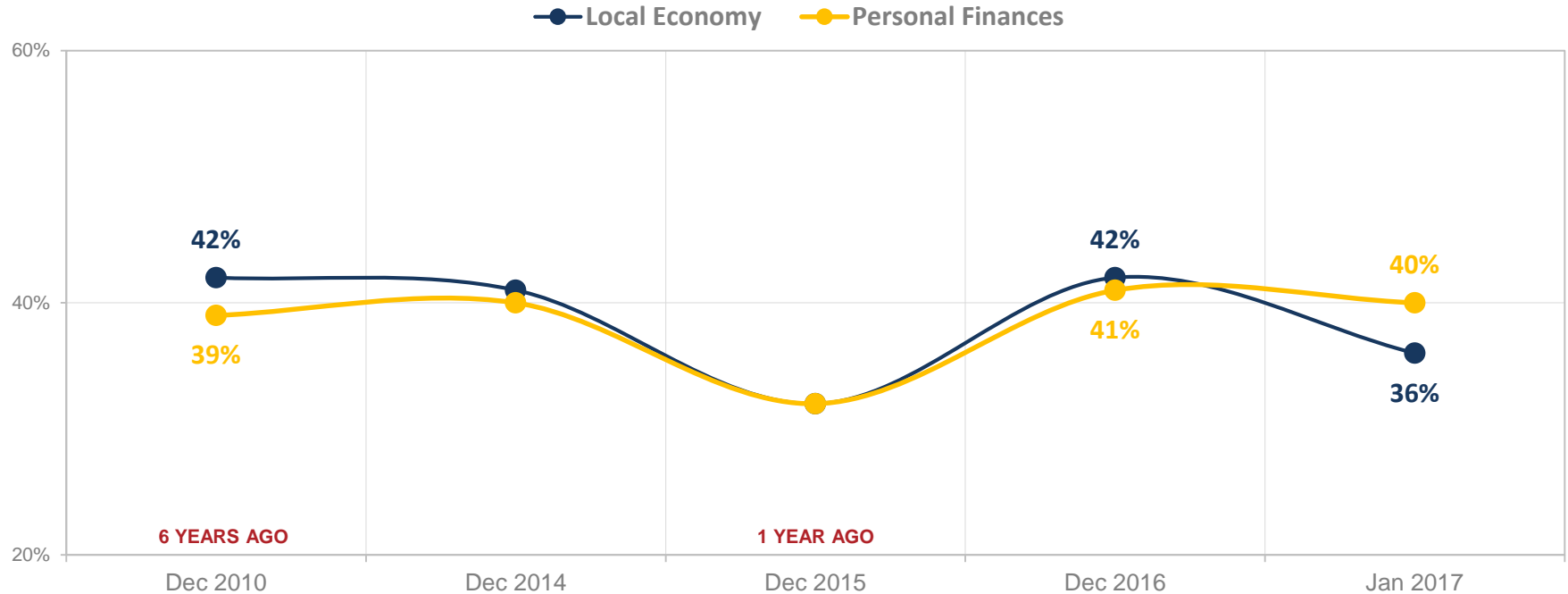
TRACKING RATING NATIONAL ECONOMY BY SELECT COUNTRIES
 (% Rate "Very/Somewhat Good")



Now, thinking about our economic situation, how would you describe the current economic situation in ...?

Canadians' assessment of their personal finances is flat; regional economic assessment down

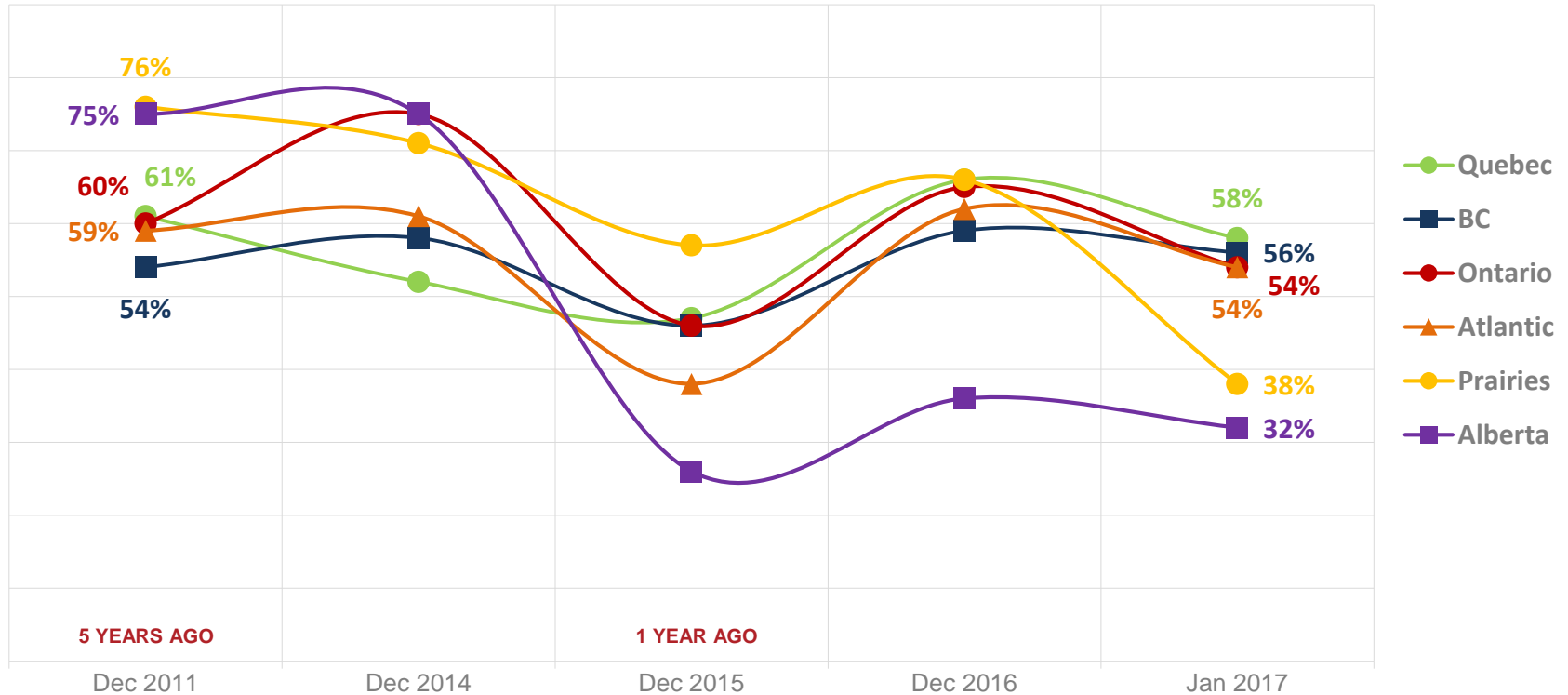
TRACKING REGIONAL ECONOMY AND PERSONAL FINANCES



Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy; Rate your current financial situation, using a scale from 1 to 7, where 7 means your personal financial situation is very strong today and 1 means it is very weak

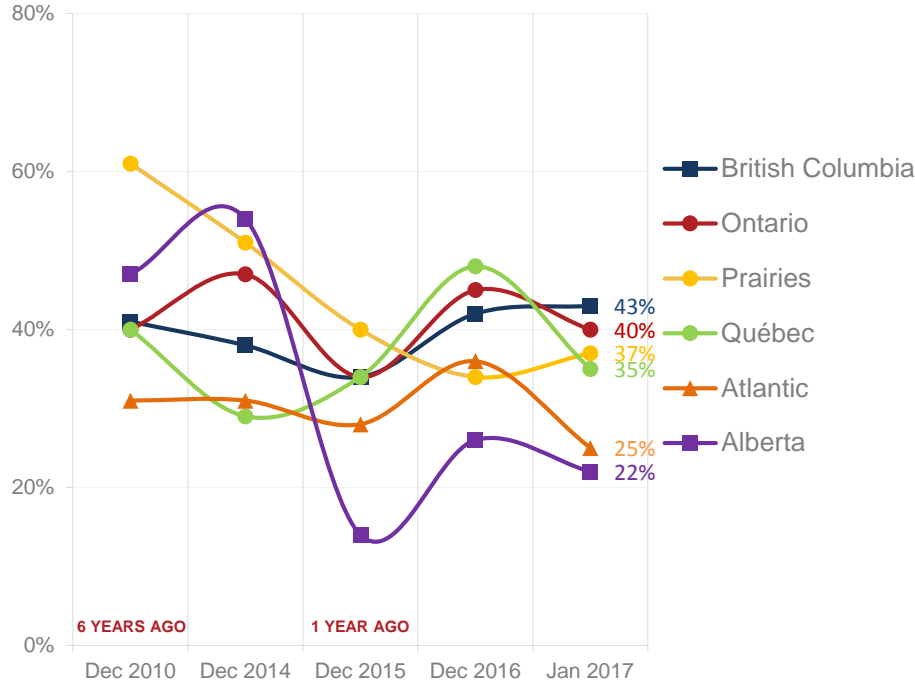
Assessment of the national economy has dropped in all regions, particularly in the Prairies

NATIONAL ECONOMY BY REGION
(% Very Good/Somewhat Good)

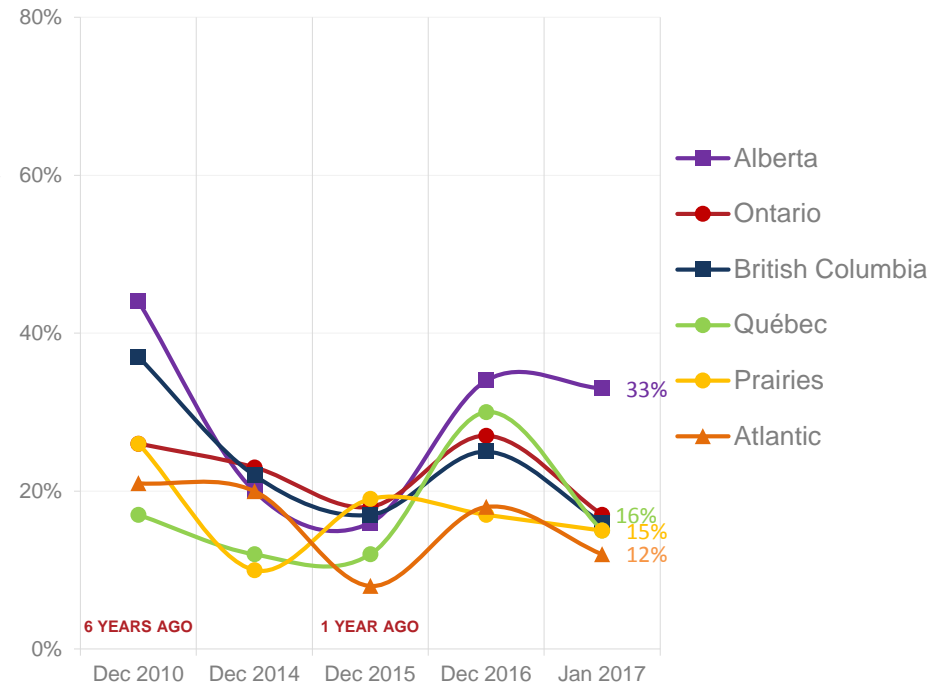


Quebec, Ontario, Atlantic show biggest decline in local economy assessment; Alberta has highest expectations for improvement

LOCAL ECONOMY CURRENTLY BY REGION
(% Strong Top 3: 5-7)



LOCAL ECONOMY IN SIX MONTHS BY REGION
(% Much Stronger / Somewhat Stronger)

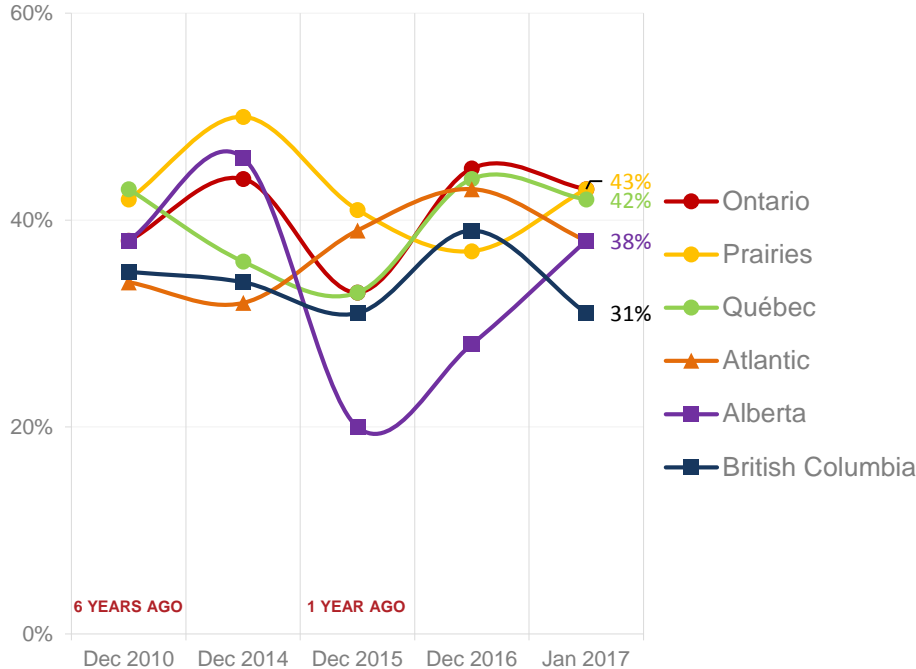


Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy. Looking ahead six months from now, do you expect your local economy to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

Assessment of personal finances down in all regions but Prairies and Alberta; Prairies and BC have highest expectations for improvement

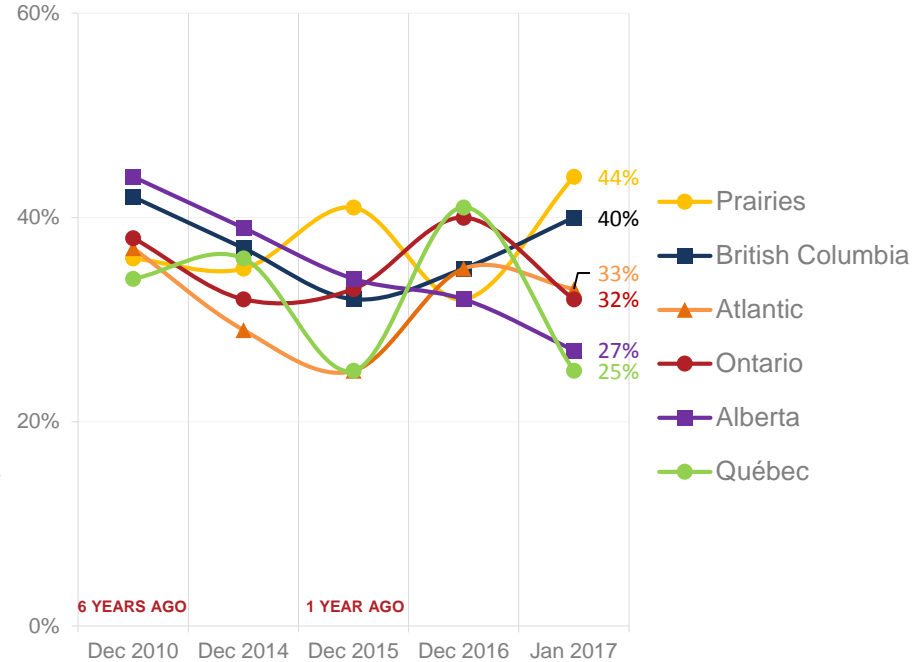
PERSONAL FINANCES CURRENTLY BY REGION

(% Strong Top 3: 5-7)



PERSONAL FINANCES IN SIX MONTHS BY REGION

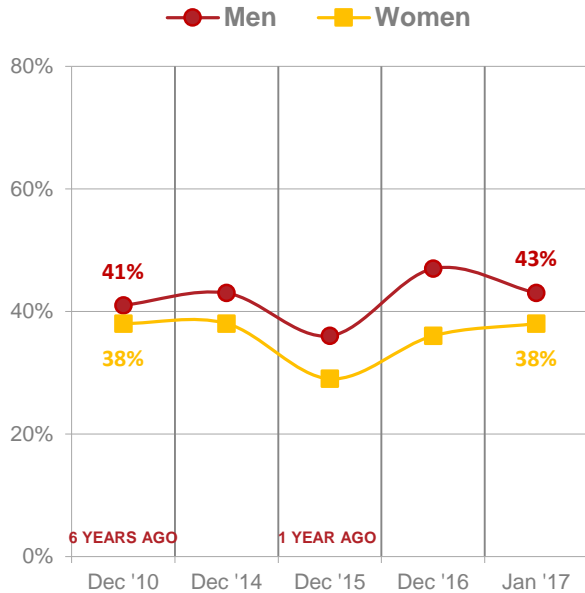
(% Much Stronger / Somewhat Stronger)



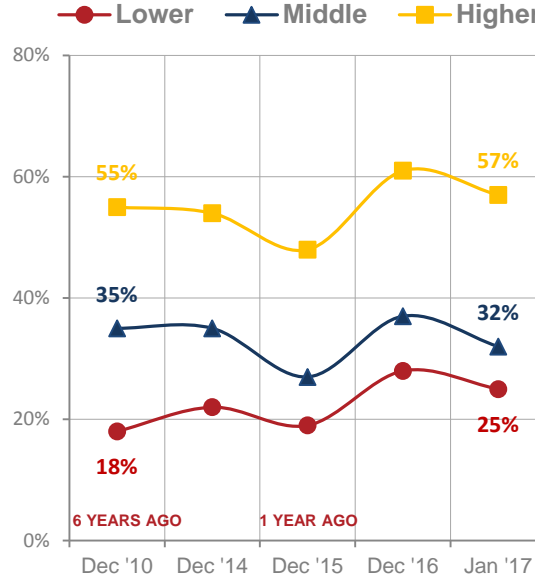
Rate your current financial situation, using a scale from 1 to 7, where 7 means your personal financial situation is very strong today and 1 means it is very weak. Looking ahead six months from now, do you expect your personal financial situation to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

Men, middle and higher income groups and Baby Boomers trending down in assessing their personal finances

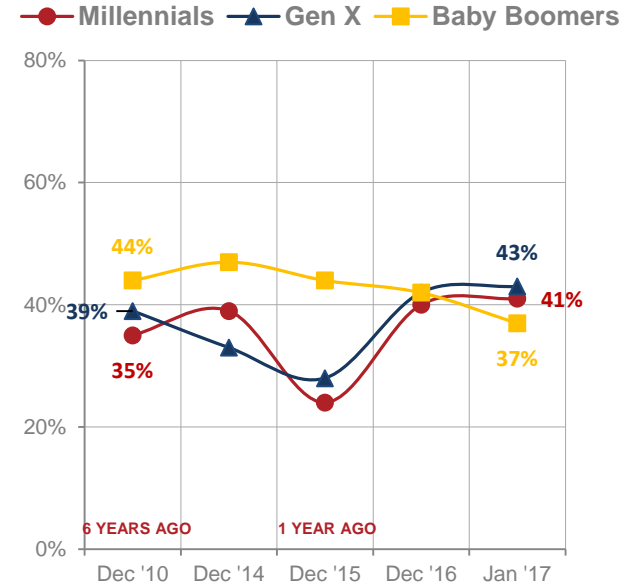
PERSONAL FINANCES CURRENTLY BY SELECT DEMOGRAPHICS
 (% Strong Top 3: 5-7)



GENDER



HOUSEHOLD INCOME

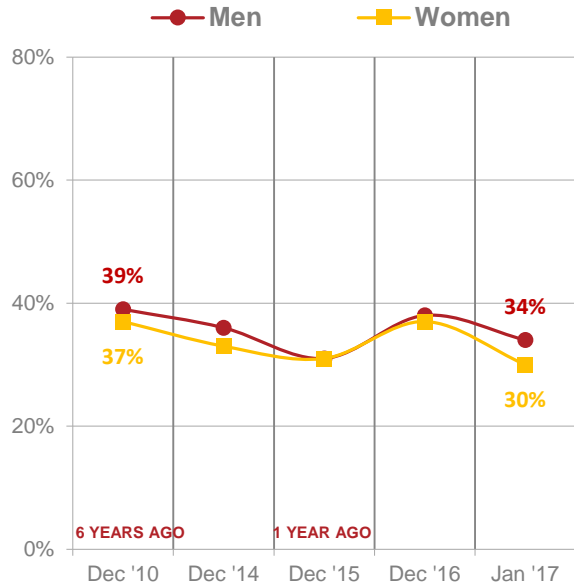


AGE

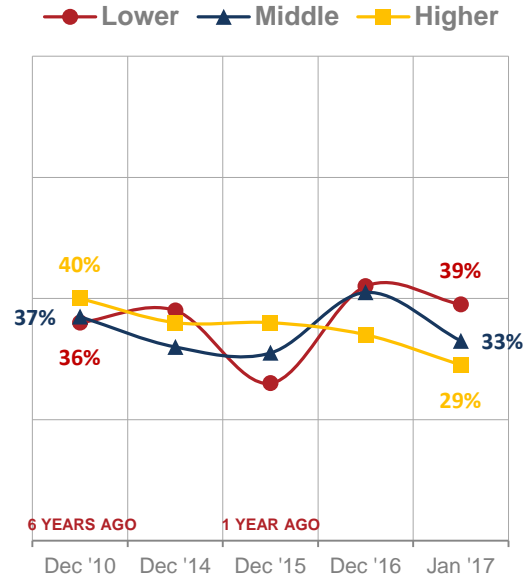
Rate your current financial situation, using a scale from 1 to 7, where 7 means your personal financial situation is very strong today and 1 means it is very weak.

All demographic groups show decreasing expectations for improvement in personal finances, particularly women, middle income, and Gen X

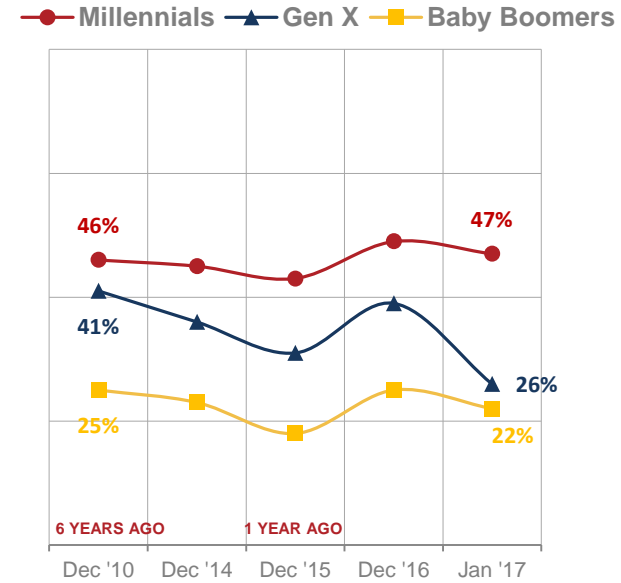
PERSONAL FINANCES IN SIX MONTHS BY SELECT DEMOGRAPHICS
 (% Much Stronger / Somewhat Stronger)



GENDER



HOUSEHOLD INCOME



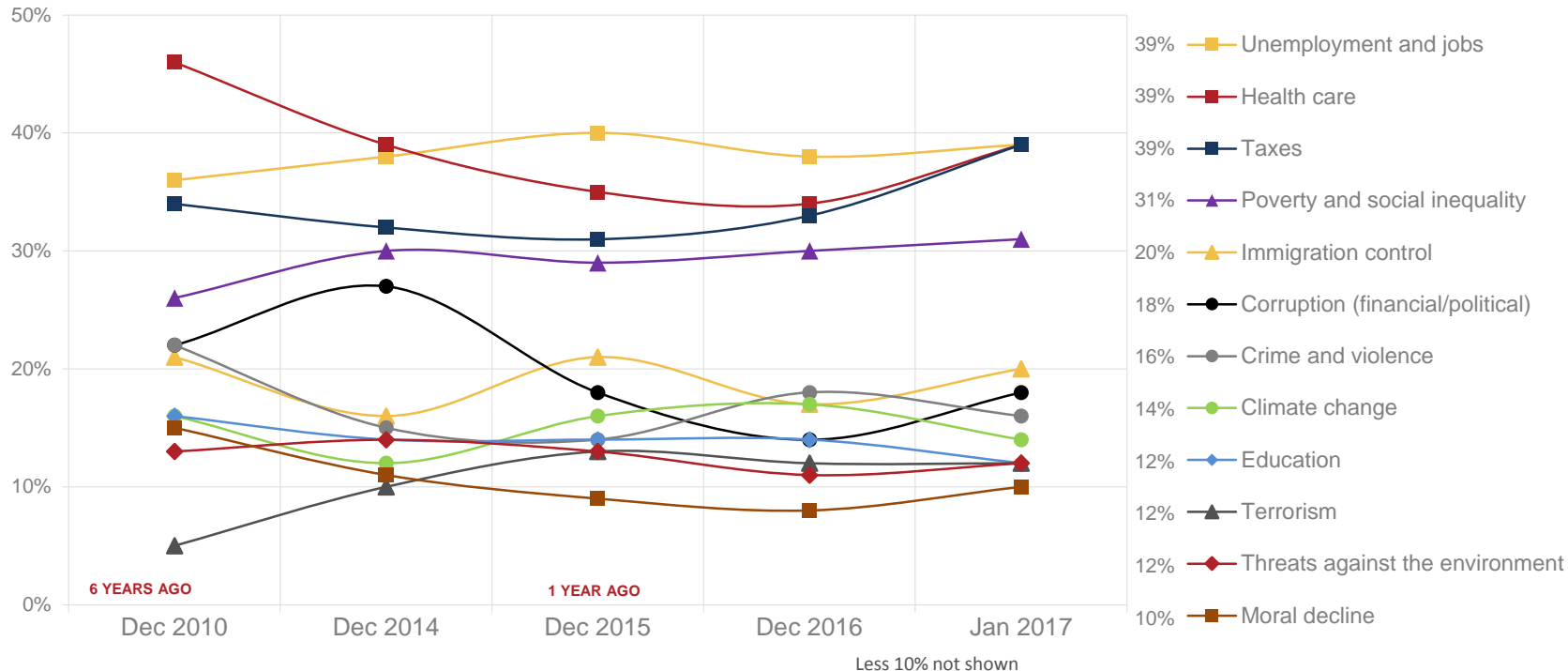
AGE

Looking ahead six months from now, do you expect your personal financial situation to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

IMPORTANT NATIONAL ISSUES

Taxes, healthcare, and unemployment/jobs are top national issue priorities, with taxes and healthcare on the upswing

TRACKING SELECT TOP NATIONAL ISSUES – CANADA
(% Rate In Top 3)



Which three of the following topics do you find the most worrying in your country? (List provided)

Top issue ranking varies by province/region...

TOP 5 CURRENT ISSUES (Jan '17) (Rank out of 14 issues) (% in top 3 issues)

TOP ISSUE (grey)	REGION					
	BC	Alberta	Prairies	Ontario	Quebec	Atlantic
Poverty/Social Inequality	1 (45%)	5 (25%)	4 (31%)	4 (26%)	2 (37%)	4 (24%)
Healthcare	2 (40%)	4 (27%)		3 (33%)	1 (51%)	1 (52%)
Unemployment/Jobs	3 (39%)	1 (69%)	3 (33%)	2 (43%)	4 (22%)	3 (40%)
Taxes	4 (31%)	2 (50%)	1 (45%)	1 (45%)	3 (27%)	2 (43%)
Immigration Control		3 (30%)	2 (35%)	5 (18%)	5 (19%)	
Crime/Violence			5 (30%)			5 (22%)
Corruption					3 (27%)	
Education						
Climate Change	5 (17%)					
Terrorism					5 (19%)	

...and also across demographic groups

TOP 5 CURRENT ISSUES (Jan '17) (Rank out of 14 issues) (% in top 3 issues)

TOP ISSUE (grey)	GENDER		INCOME (\$)			AGE		
	Men	Women	Lower	Middle	Higher	Millennials	Gen X	Boomers
Unemployment/ Jobs	1 (40%)	2 (39%)	3 (33%)	1 (41%)	3 (40%)	1 (44%)	3 (36%)	3 (37%)
Taxes	1 (40%)	2 (39%)	4 (21%)	2 (40%)	1 (49%)	2 (40%)	2 (38%)	2 (39%)
Healthcare	2 (36%)	1 (41%)	1 (39%)	3 (35%)	2 (42%)	4 (30%)	1 (40%)	1 (46%)
Poverty/Social Inequality	3 (29%)	3 (34%)	2 (38%)	4 (33%)	4 (29%)	3 (32%)	4 (32%)	4 (31%)
Immigration Control	4 (23%)	5 (17%)	5 (20%)	5 (20%)	5 (19%)			5 (25%)
Corruption	5 (20%)					5 (18%)		
Crime		4 (19%)	4 (21%)				5 (20%)	
Climate Change						5 (18%)		

DATA FOR THIS REPORT WERE GENERATED FROM IPSOS' GLOBAL ADVISOR

SURVEY METHOD	COUNTRIES	SAMPLE	WEIGHTING
<p>The surveys were conducted monthly in 25 countries around the world via the Ipsos Online Panel system. Data are normally collected in the 2nd and 3rd weeks of each month.</p>	<p>16 of the 25 countries surveyed online provide nationally representative samples: Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Israel, Italy, Japan, Poland, South Korea, Spain, Sweden, and the United States. Online samples in Brazil, China, India, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey are more urban/educated/income than their fellow citizens and are referred to as “Upper Deck Consumer Citizens.”</p>	<p>The normal sample each wave consists of an international sample of approximately 19,000 adults age 18-64 in the US and Canada, and age 16-64 in all other countries. Approximately 1000+ individuals participate on a country by country basis via the Ipsos Online Panel with the exception of Argentina, Belgium, Hungary, India, Israel, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+.</p>	<p>Weighting is employed to balance demographics to ensure that the sample's composition reflects that of the adult population according to the most recent country Census data. A survey with an unweighted probability sample and a 100% response rate would have an estimated margin of error of +/-3.1 percentage points for a sample of 1,000 and an estimated margin of error of +/- 4.5 percentage points 19 times out of 20 per country for a sample of 500 of what the results would have been had the entire population of adults in that country had been polled. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.</p>

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