

Ipsos Public Affairs and the eNation Omnibus present:

What are Canadians Thinking?

FEATURING:

Sean Simpson, Vice President

Rhys Gibb, Vice President

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WHERE DO WE GET THIS STUFF?

Ipsos eNation Omnibus

The data for this presentation are derived from two studies, both conducted on the eNation omnibus:



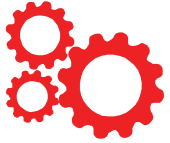
IpsosCanadaNext

—● Ipsos Canada Next in Partnership with IBM, the Munk School and School of Public Policy and Governance at U of T and Global News



—● Ipsos / Global News Year End Poll which is a series of stories that we roll out at the end of the year covering a broad-range of attitudes for politics to lifestyle.

Omnibus Overview



WHAT IS AN OMNIBUS?

An Omnibus is a multi-client survey with shared demographic questions, field and data tabulation resources

- Multiple clients on one survey
- Costs are shared, but results aren't
- Costs charged on a per-question basis
- Standardized and customized data tables produced
- Regularized methodology and schedule
- Can be by any methodology, but telephone and online are the most common
- Typically general population studies*



WHAT DO YOU GET FROM AN OMNIBUS?

Ipsos eNation Offerings:

- Access to the Same Top-Quality Field Resources as Custom Surveys, Conducted In-house
- Online methodology
- Robust Sample Sizes
- Cross-Tabulated Data Tables
- Customizable Banners
- Data Files of Survey Results in SPSS, MS Excel or flat ASCII formats are available on request

Omnibus Overview (*cont'd*)



BENEFITS OF AN OMNIBUS

- Affordability
- Speed
- Representativeness
- Flexibility
- Standardized Methodology





SOME IDEAL USES FOR AN OMNIBUS

- Awareness and Usage
- Incidence Checks
- Advertising Awareness (Pre and Post)
- Low Incidence Studies
- Regional Studies
- Concept Testing
- Product Name or Spokesperson Selection

Ipsos eNation Canada

Our national, rolling weekly online survey of 1,000 Canadians

- Pricing starts at \$900 per closed-ended question and \$1,300 per open-ended question and drops after 5 questions
- Sample drawn from the  panel and 
- Images, videos, complicated skip patterns can all be accommodated
- Results weighted to the Canadian Census

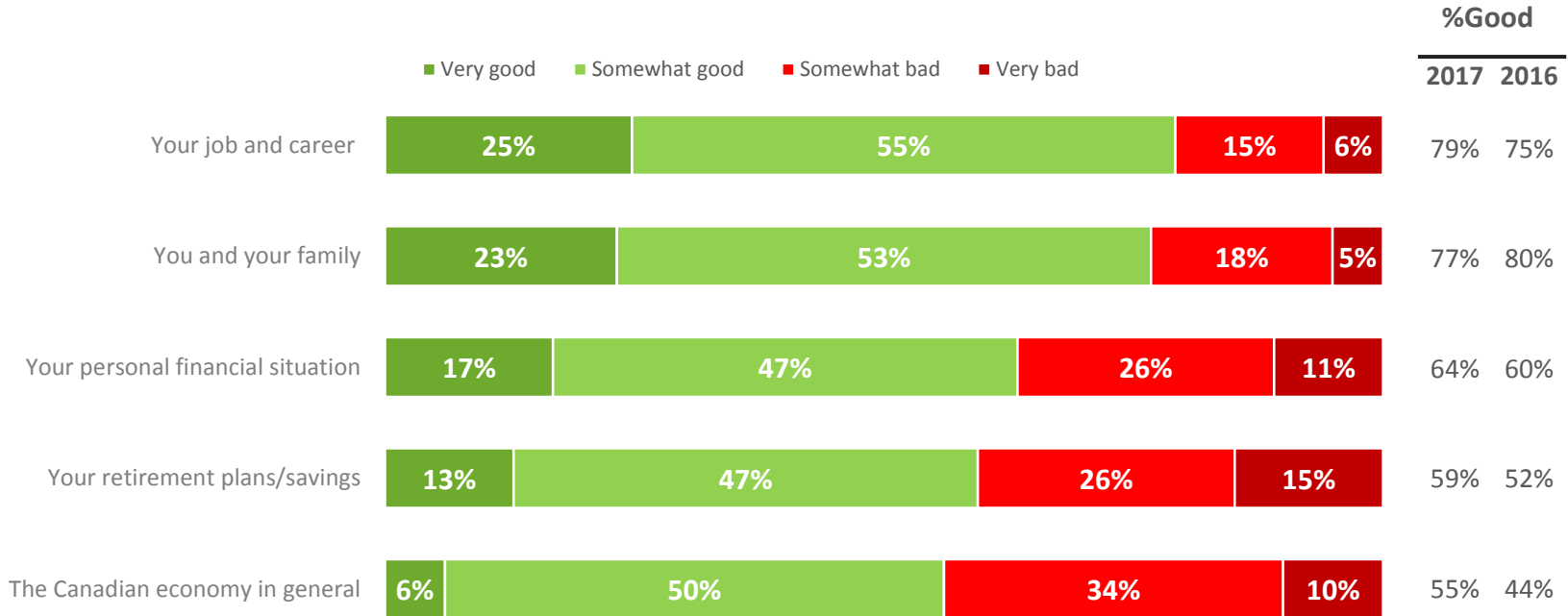
Questions Received (by 1:00 pm ET)	Survey to Field	Data Delivery (by 4:00 pm ET)
Monday	Wednesday	Monday
Tuesday	Thursday	Tuesday
Wednesday	Friday	Wednesday
Thursday	Monday	Thursday
Friday	Tuesday	Friday



2017 IN REVIEW

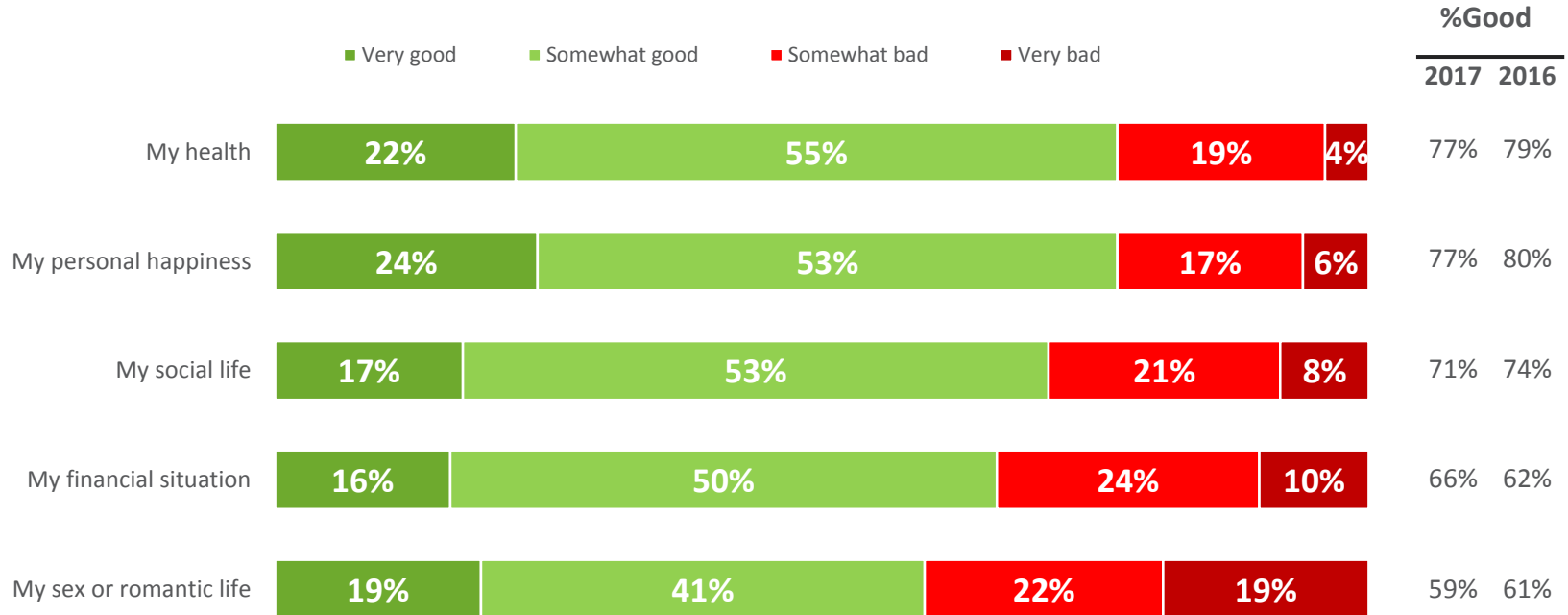
REFLECTIONS ON 2017

In many respects, 2017 was an improvement on 2016, except when it comes to family life



RATING ONE'S OWN LIFE

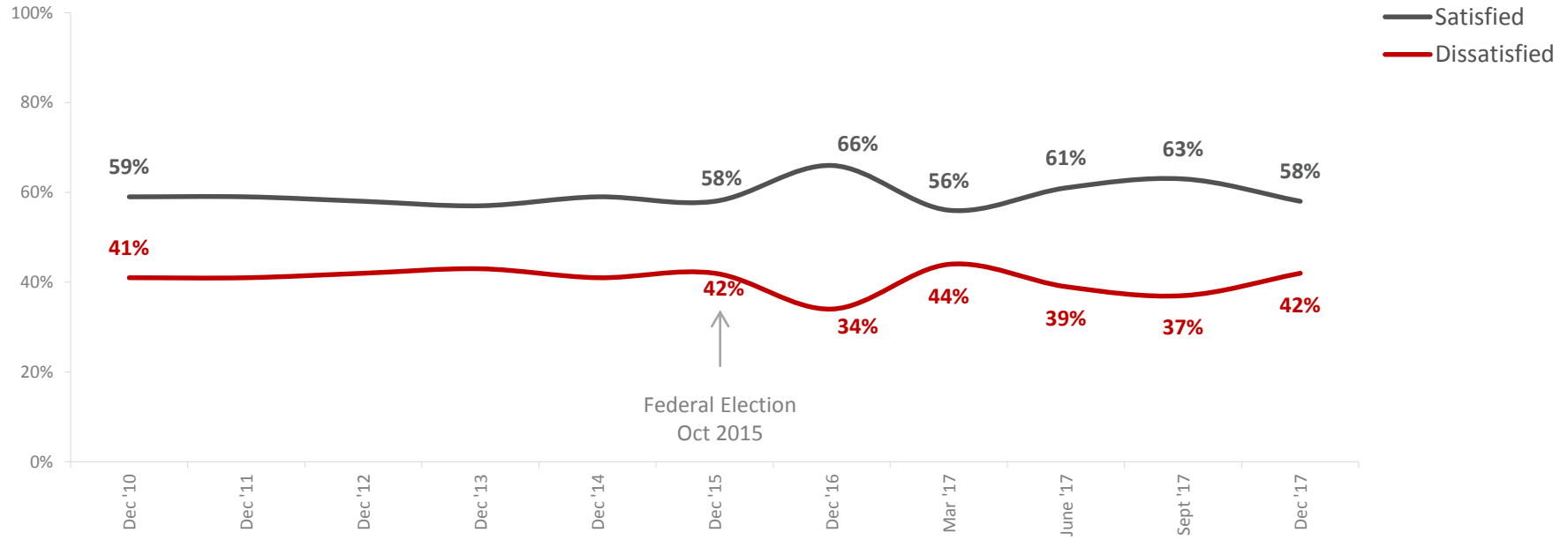
Canadians have seen slight deterioration in health, happiness, social life and sex life, but improvement in financial situation



SATISFACTION IN CANADA

Majority remain satisfied with how things are going in Canada, but down vs last quarter

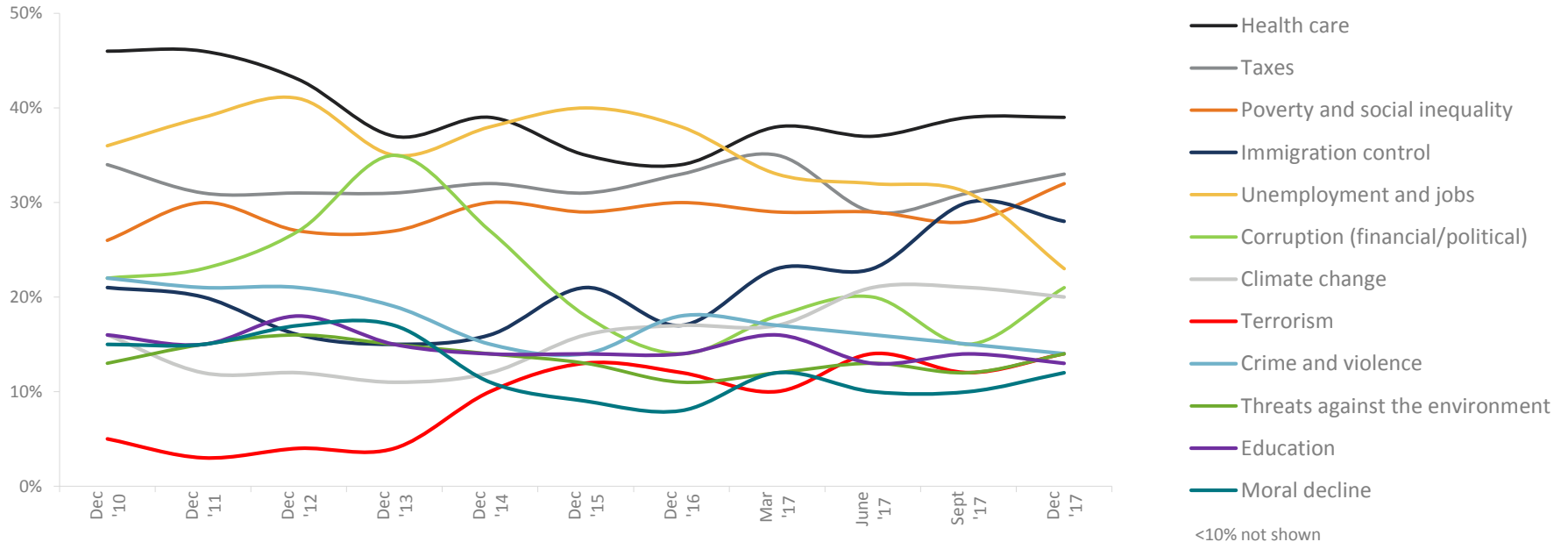
OVERALL SATISFIED THINGS GOING IN CANADA



TOP ISSUES IN CANADA

Healthcare maintains top spot as priority national issue; Taxes, Poverty/Inequality, Corruption up over last quarter.

TRACKING SELECT TOP NATIONAL ISSUES – CANADA (% rate in top 3)



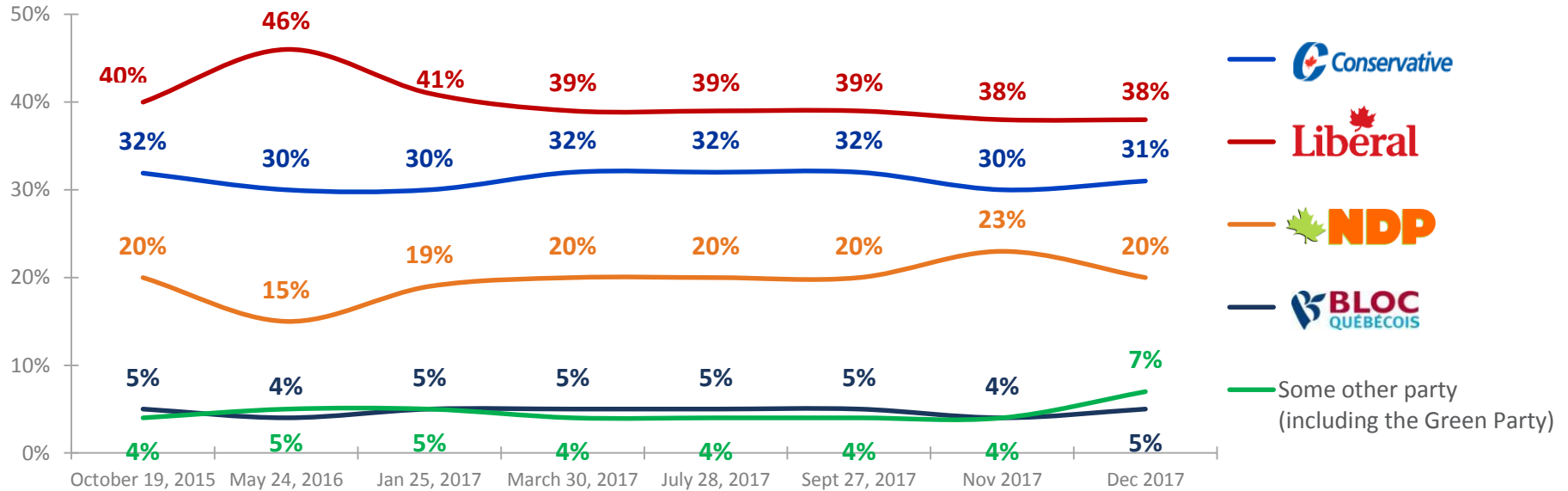
<10% not shown



FEDERAL POLITICS

FEDERAL VOTING INTENTIONS

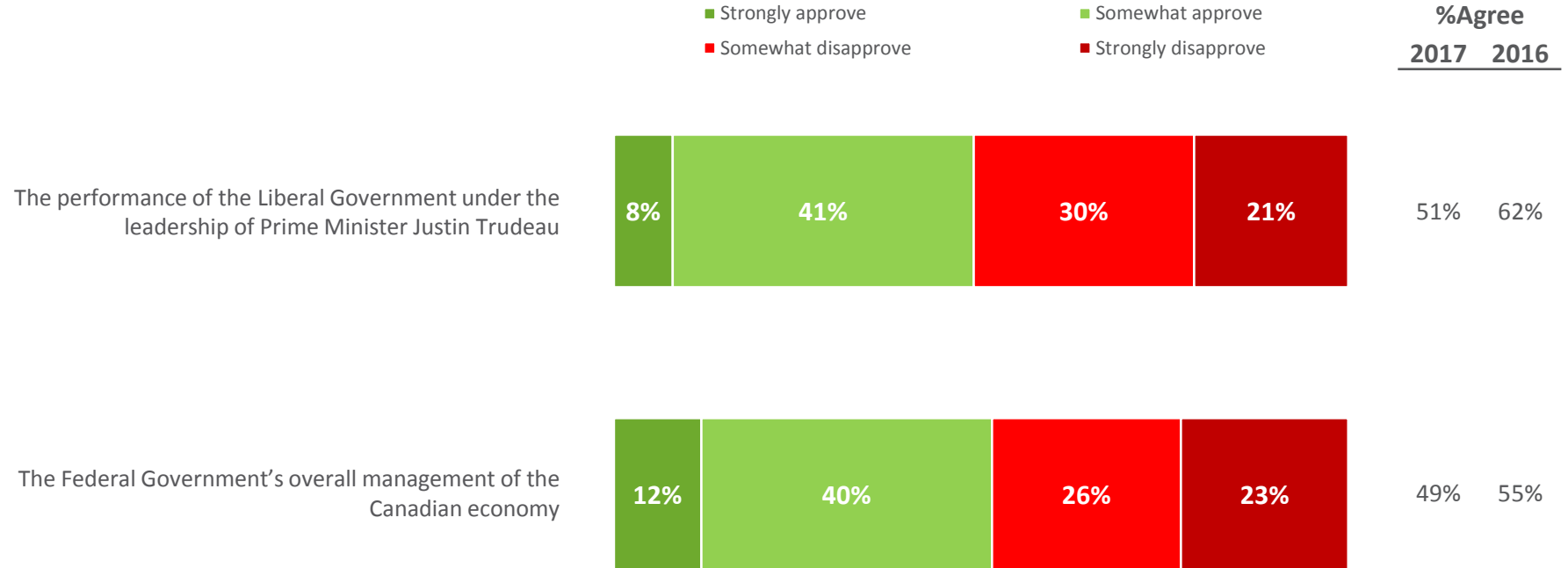
Liberal Lead Holds Steady



Rv1a. Thinking of how you feel right now, if a FEDERAL election were held tomorrow, which of the following parties' candidates would you, yourself, be most likely to support? / Rv1b. Well, which party would you say you would lean towards?

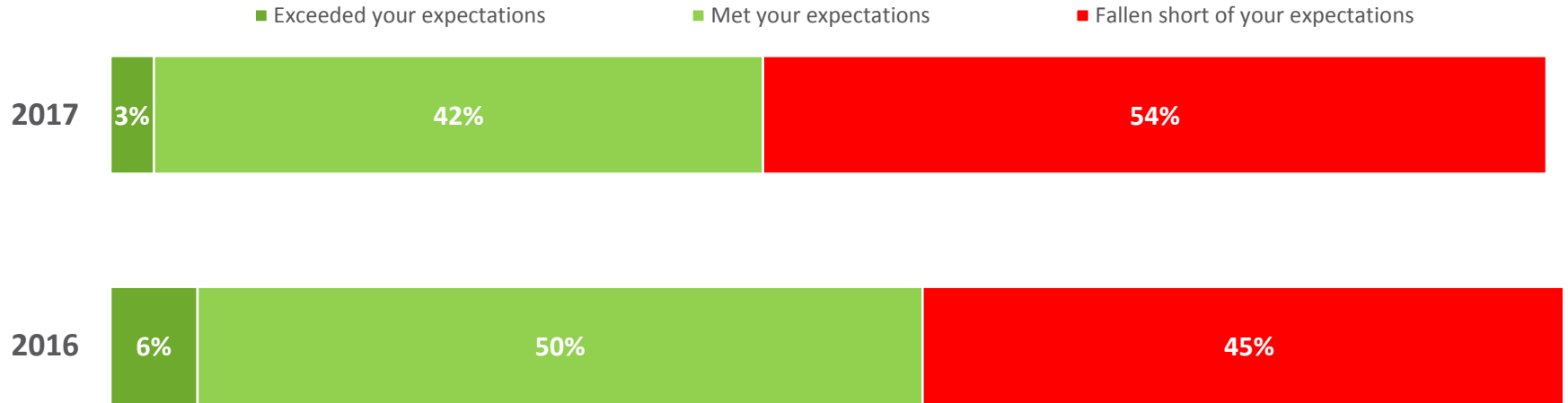
FEDERAL APPROVAL RATINGS

Overall approval ratings soften in last twelve months (down 9 points), but still relatively strong



EXPECTATIONS OF LIBERAL GOVERNMENT

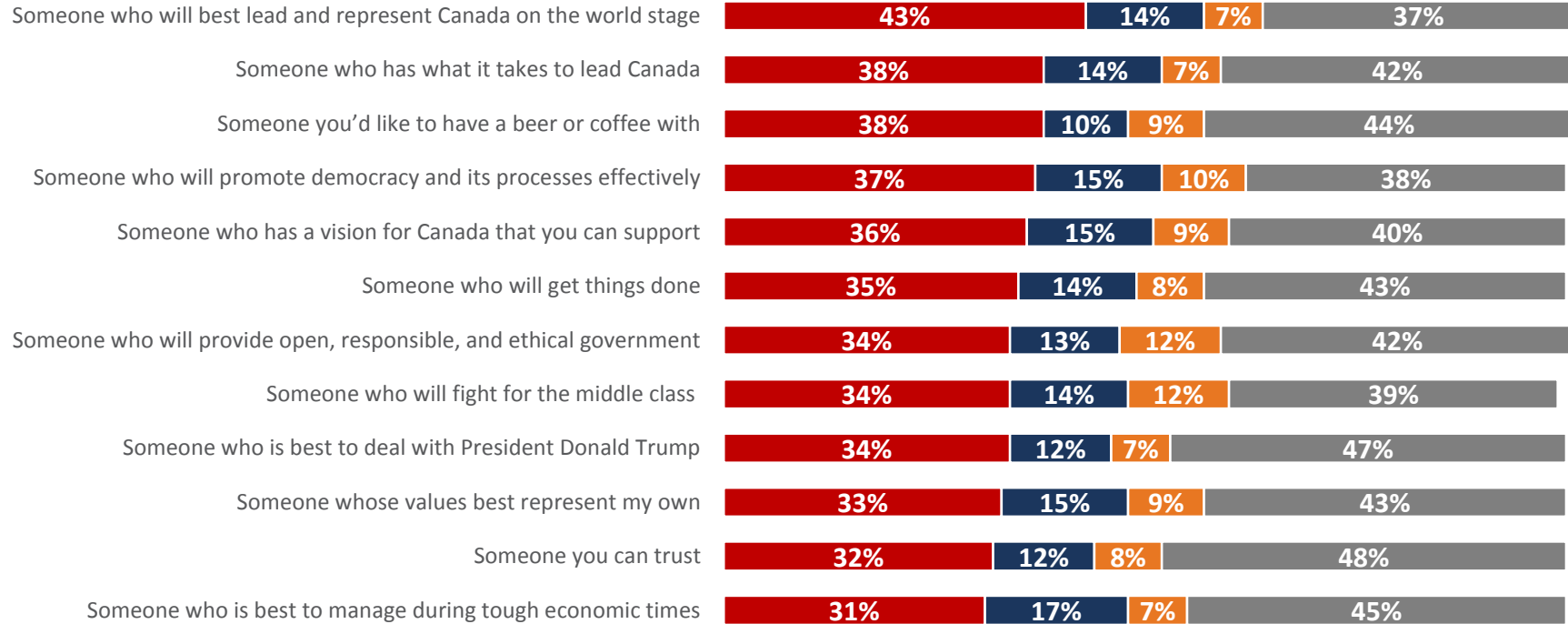
Majority (54%, up 9 points) of Canadians now say Trudeau government has fallen short of expectations



FEDERAL LEADERSHIP ATTRIBUTES

Trudeau holds massive lead over rivals Scheer and Singh

Justin Trudeau ■
 Andrew Scheer ■
 Jagmeet Singh ■
 None of these leaders ■

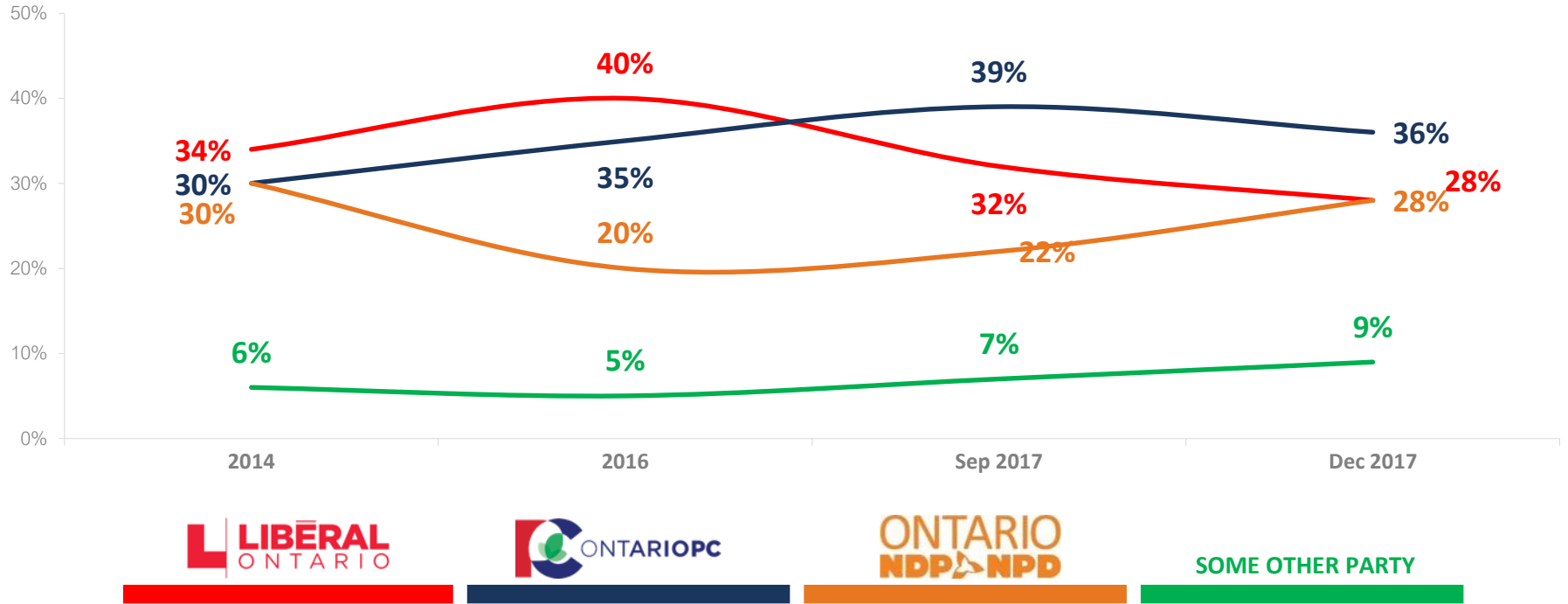




ONTARIO POLITICS

ONTARIO VOTING INTENTIONS

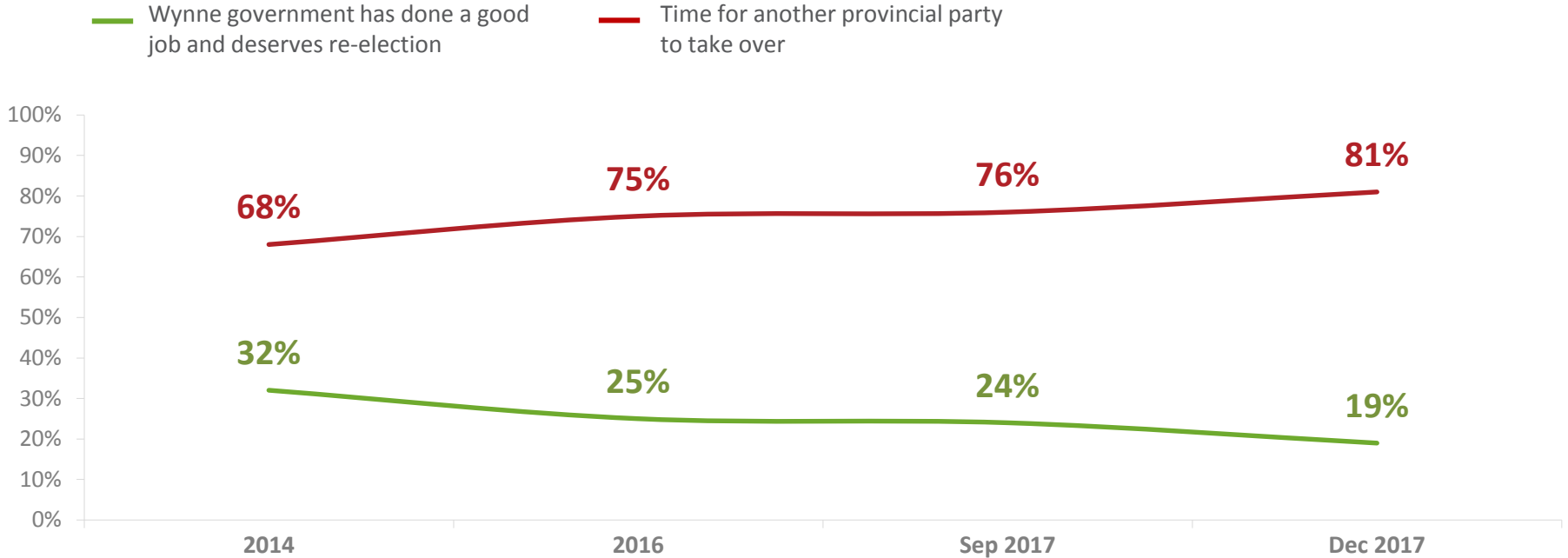
NDP (28%, up 6) ties Liberals (28%, down 4), Tories (36%, down 3) still ahead



QF1. If a provincial election were held tomorrow, which of the following parties' candidates would you be most likely to support? / QF2. Well, which party would you say you are leaning towards?

TIME FOR CHANGE?

Eight in ten (81%) say it's time for a change at Queen's Park (up 5 points)





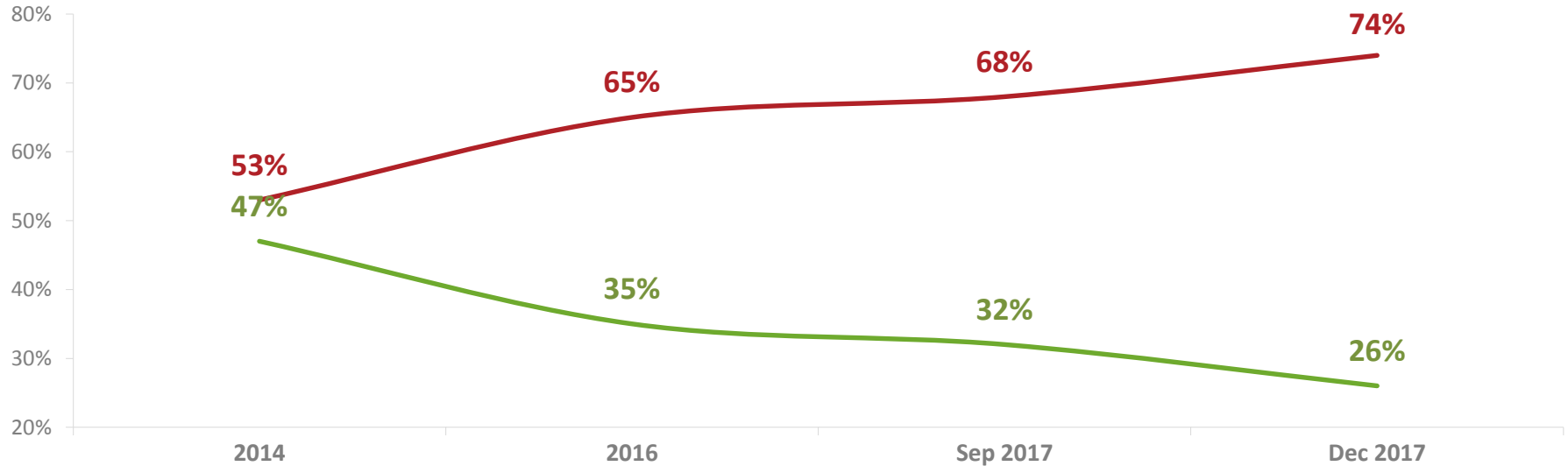
F3. Some/Other people say that the Liberal government under Premier Kathleen Wynne has done a good job and deserves to be re-elected during the next provincial election.... Some/Other people say that it is time for another provincial party to take over and run the province.

Which of these statements is closest to your point of view?

WYNNE'S GOVERNMENT'S APPROVAL RATINGS

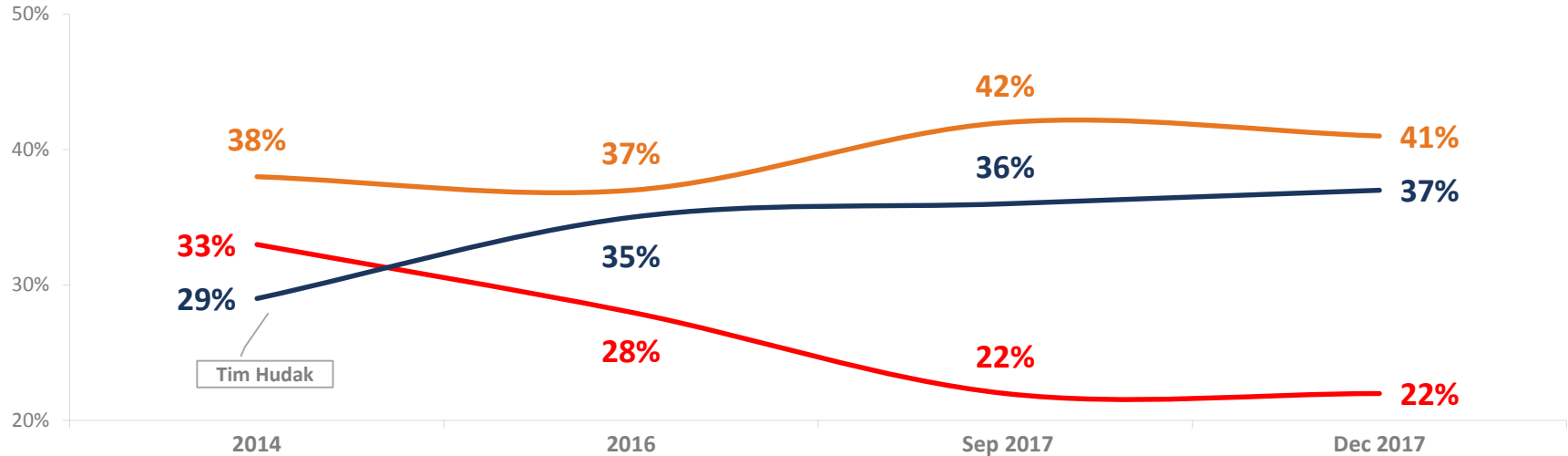
Just 26% approve of the Wynne Government's performance, down 6 points since Sep

Strongly/Somewhat Approve 
Strongly/Somewhat Disapprove 



BEST PREMIER OF ONTARIO

Ontarians continue to favour Horwath (41%) over Brown (37%) and especially Wynne (22%)



Tim Hudak



LIBERAL
ONTARIO

KATHLEEN WYNNE – Liberal Leader



ONTARIO
PC

PATRICK BROWN - PC Leader



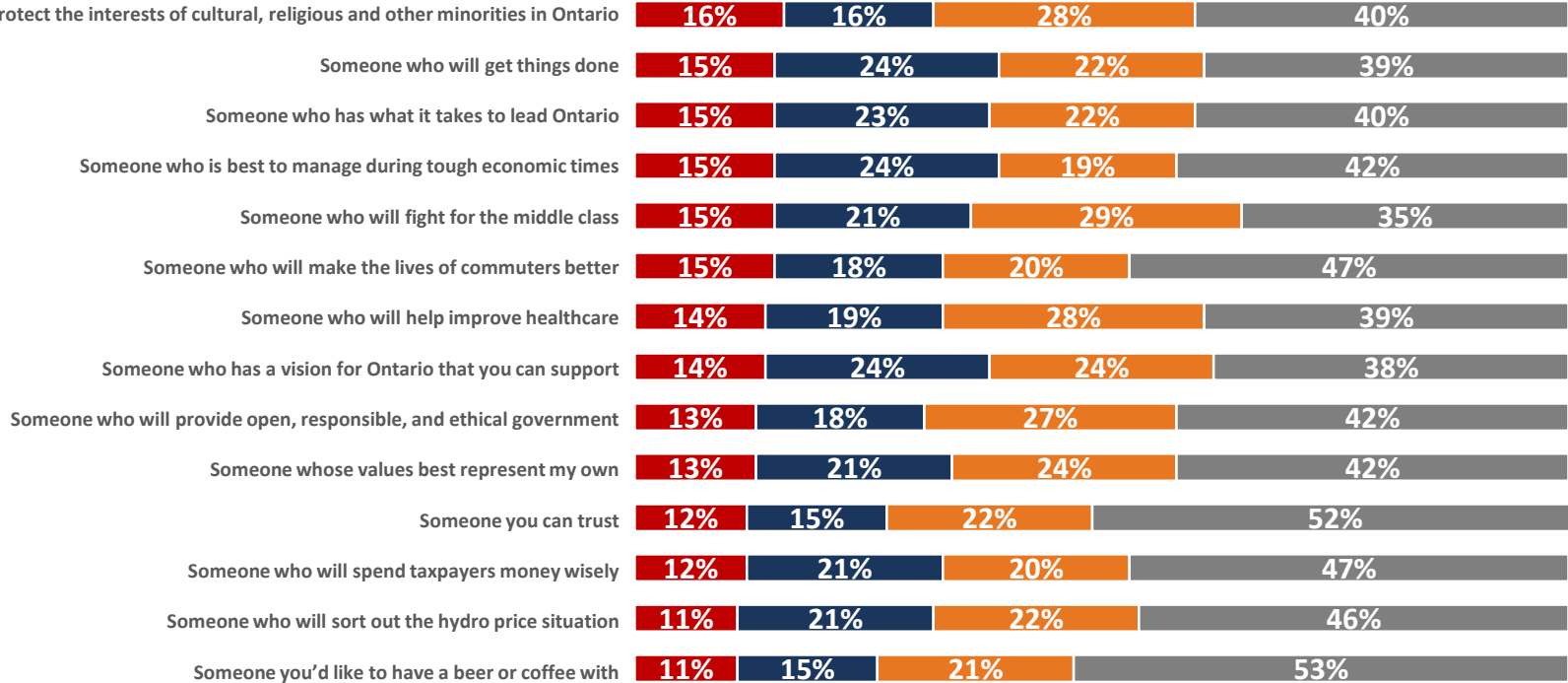
ONTARIO
NDP

Andrea Horwath - NDP Leader

PROVINCIAL LEADERSHIP ATTRIBUTES

Horwath has edge over Brown and Wynne

Kathleen Wynne ■
 Patrick Brown ■
 Andrea Horwath ■
 None of these leaders ■





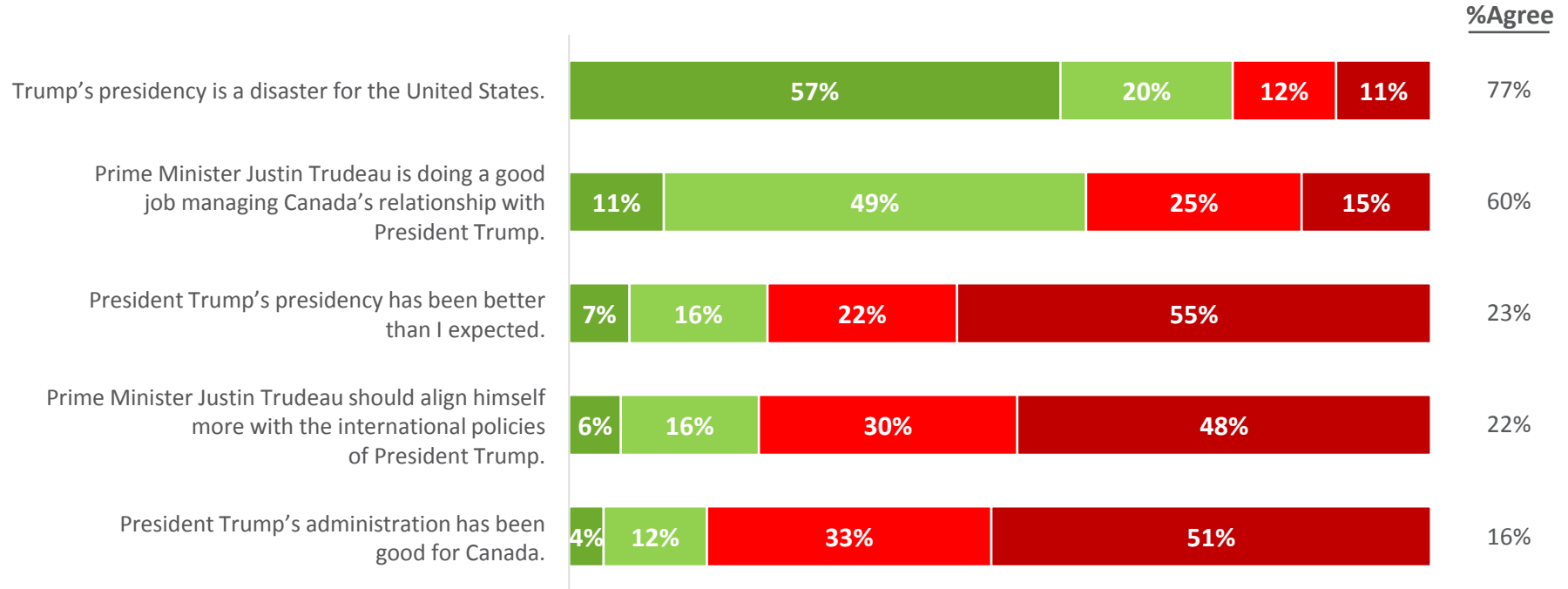
CANADIANS ON TRUMP

TRUMP'S PRESIDENCY

Majority (60%) believes Trudeau handling Trump well.

Consensus (77%) is that Trump's presidency is "a disaster" for the U.S.

Strongly Agree ■
Somewhat Agree ■
Somewhat Disagree ■
Strongly Disagree ■

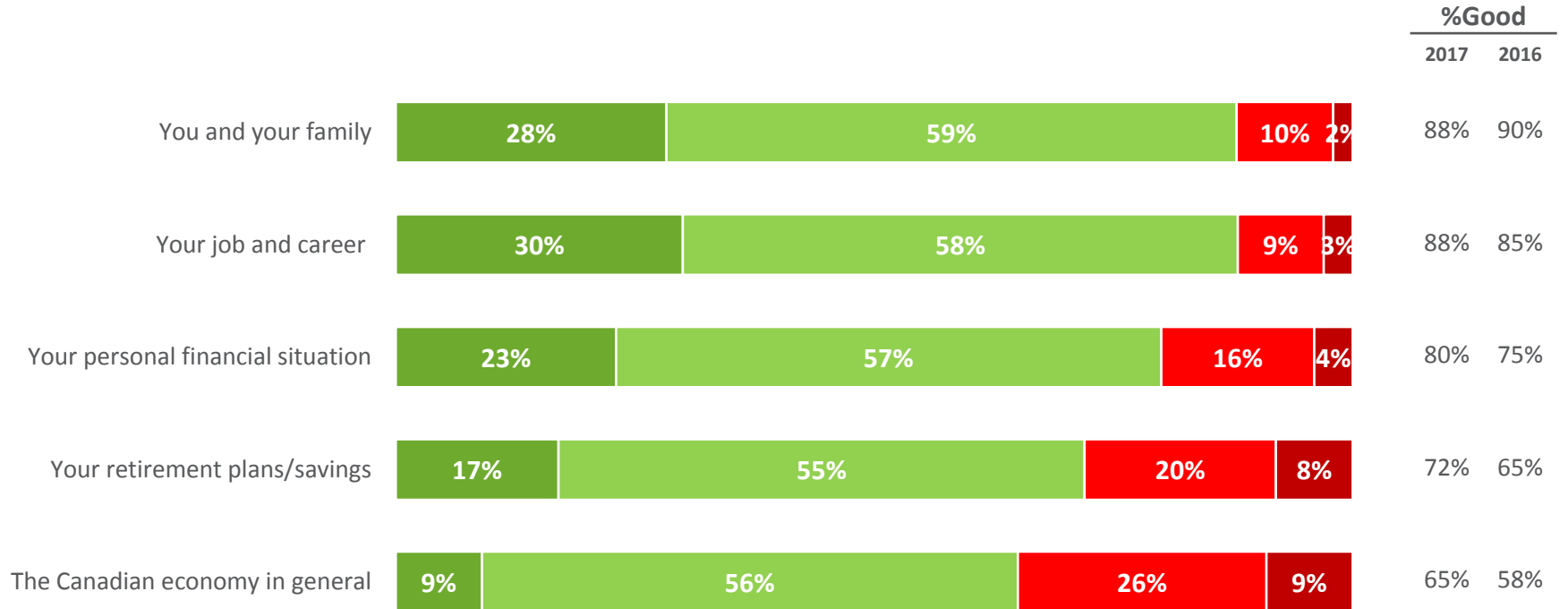
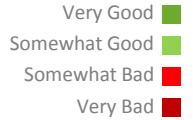




LOOKING AHEAD TO 2018

LOOKING AHEAD TO 2018

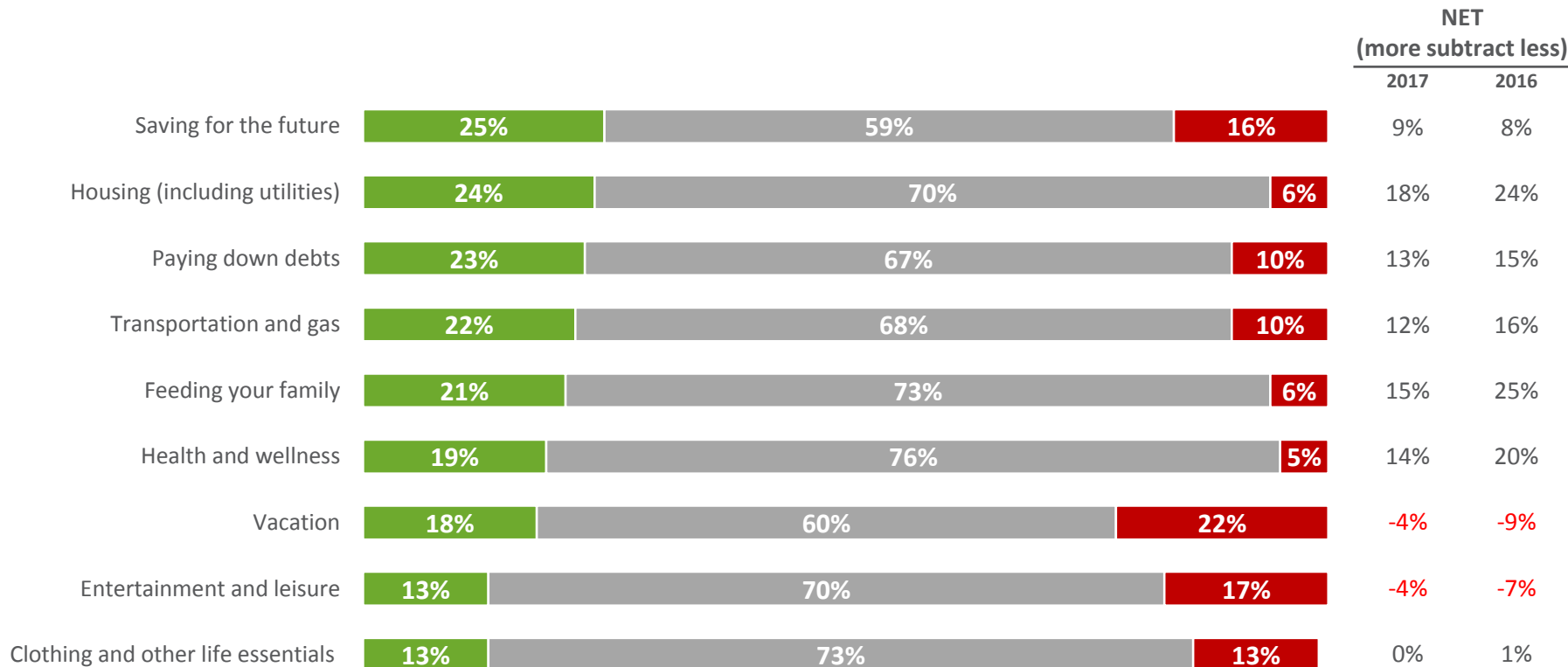
Expectations for 2018 are even higher than they were for 2017, except when it comes to family life



SPENDING INTENTIONS IN 2018

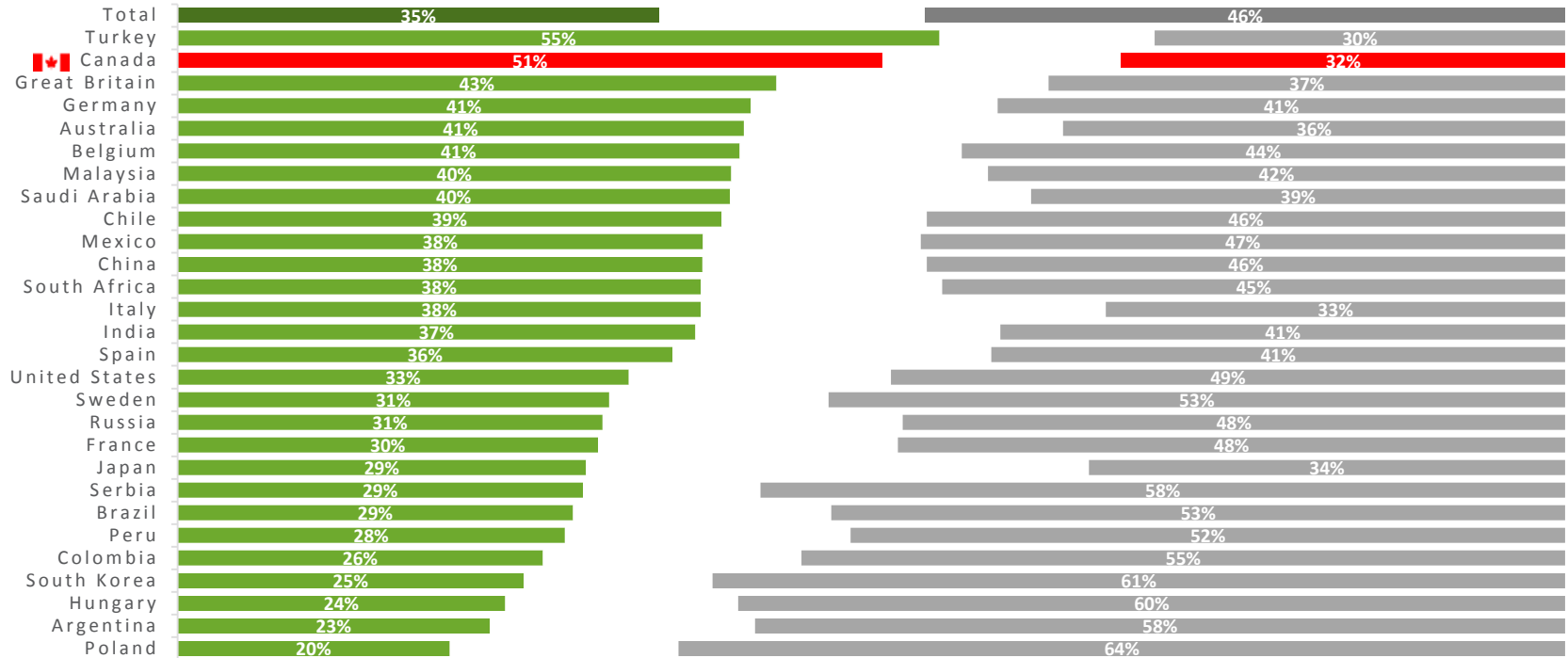
Canadians cutting vacation, leisure budgets

More ■
About the Same ■
Less ■



© 2018 Ipsos New2016Q3. Looking ahead to 2018, do you anticipate spending more, less or about the same amount of money on the following things compared to what you spent this year:

Attitudes still divided on Trump globally, but half of Americans think it is unlikely their President will be impeached



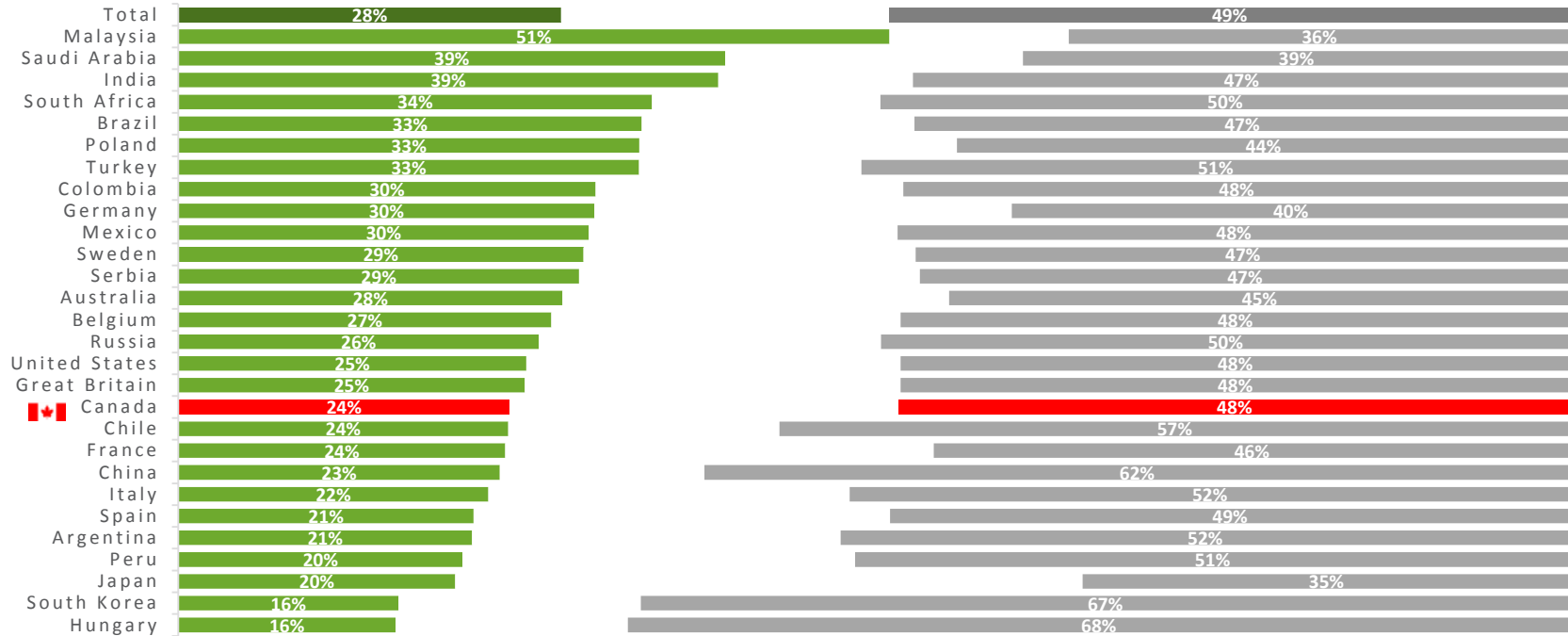
Q President Trump will be impeached

Base: 21,548 adults aged 16-64 across Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey and the United States., Nov 27 – Dec 8 2017

GLOBAL @ADVISOR PREDICTIONS FOR 2018

Around three in ten think a major stock market crash is likely

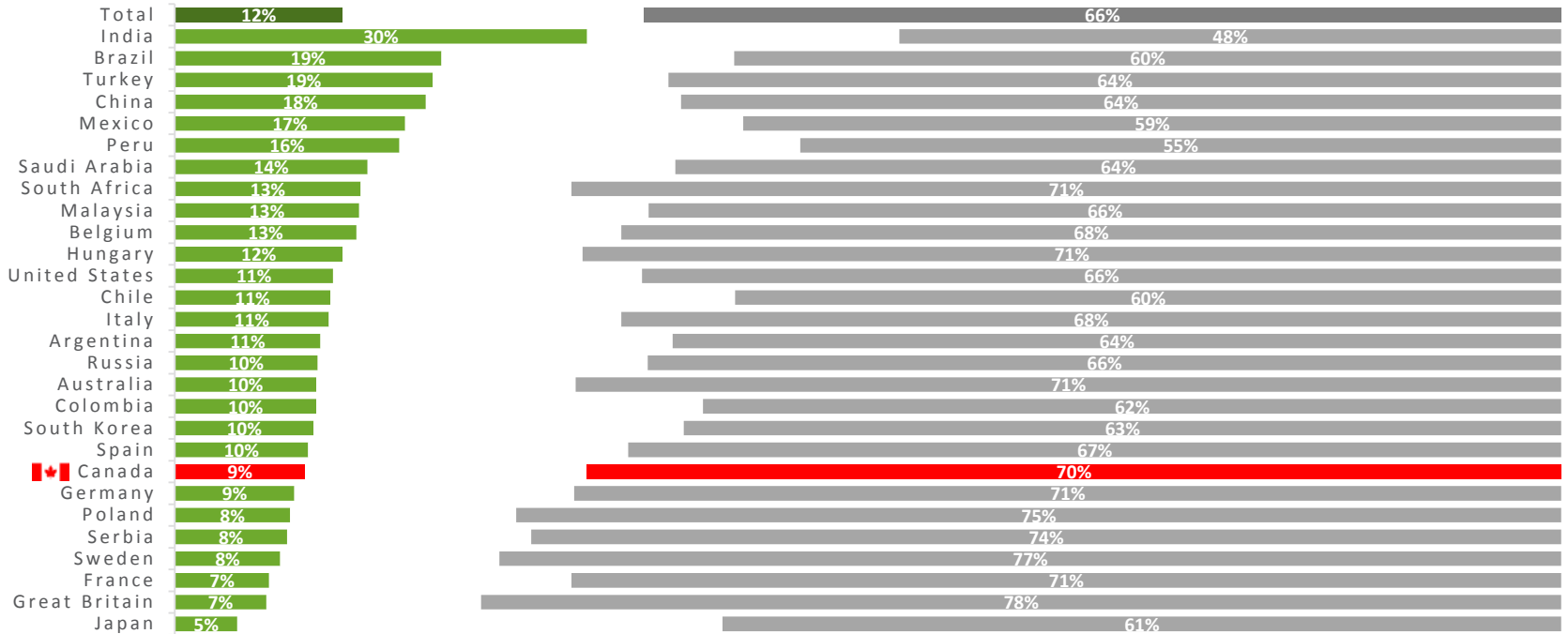
LIKELY ■
UNLIKELY ■



Q Major stock markets around the world will crash

Base: 21,548 adults aged 16-64 across Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey and the United States., Nov 27 – Dec 8 2017

Close to 1 in 10 across most countries think it likely aliens will visit the earth this year






Q Aliens will visit the earth

Base: 21,548 adults aged 16-64 across Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey and the United States., Nov 27 – Dec 8 2017



IPSOS CANADA NEXT

MANY CANADIANS SEE A LACK OF PROGRESS OR THINGS GETTING WORSE IN THE NEXT 10 YEARS

BETTER (5-7) 
SAME (4) 
WORSE (1-3) 



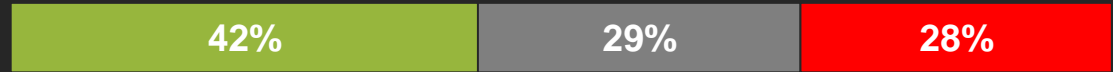
YOUR PERSONAL
FINANCIAL SITUATION



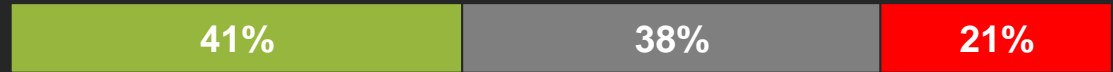
YOUR OVERALL
QUALITY OF LIFE



THE PROSPECTS FOR
YOUR COMMUNITY



THE PROSPECTS
FOR CANADA



THE PROSPECTS
FOR THE WORLD

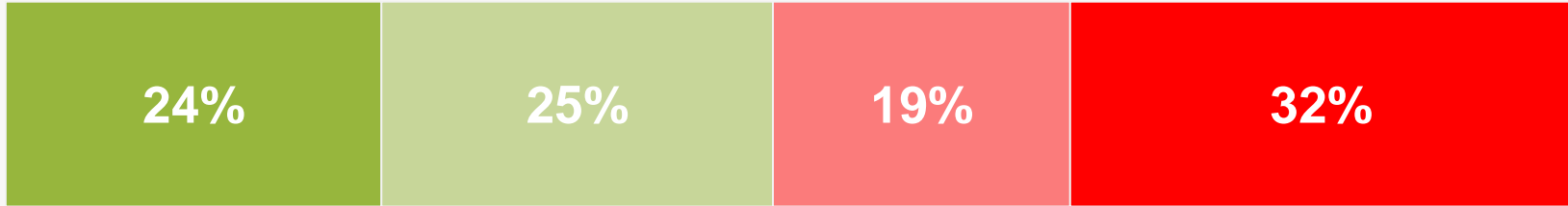
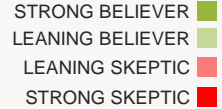




TECHNOLOGY

The Good, The Bad and Disappearing Jobs

TECH-BELIEVERS (49%) VS TECH-SKEPTICS (51%)



BELIEVERS

- More and better jobs
- People can and will overcome the downside (e.g. find a way to maintain in-person relationships)
- The benefits outweigh the risks

SKEPTICS

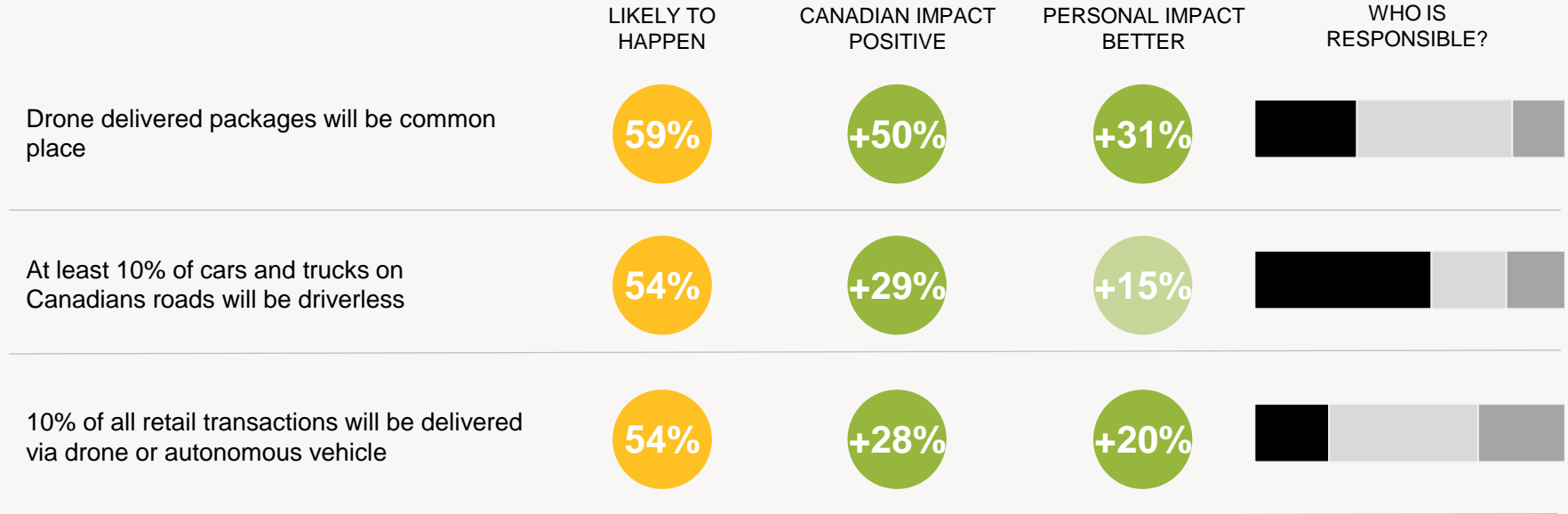
- Fear job loss
- Concern over loss of privacy and personal info
- Concern over their own inability to keep up with pace of change



**CHANGE IS INEVITABLE
BUT UNDER-ESTIMATED**

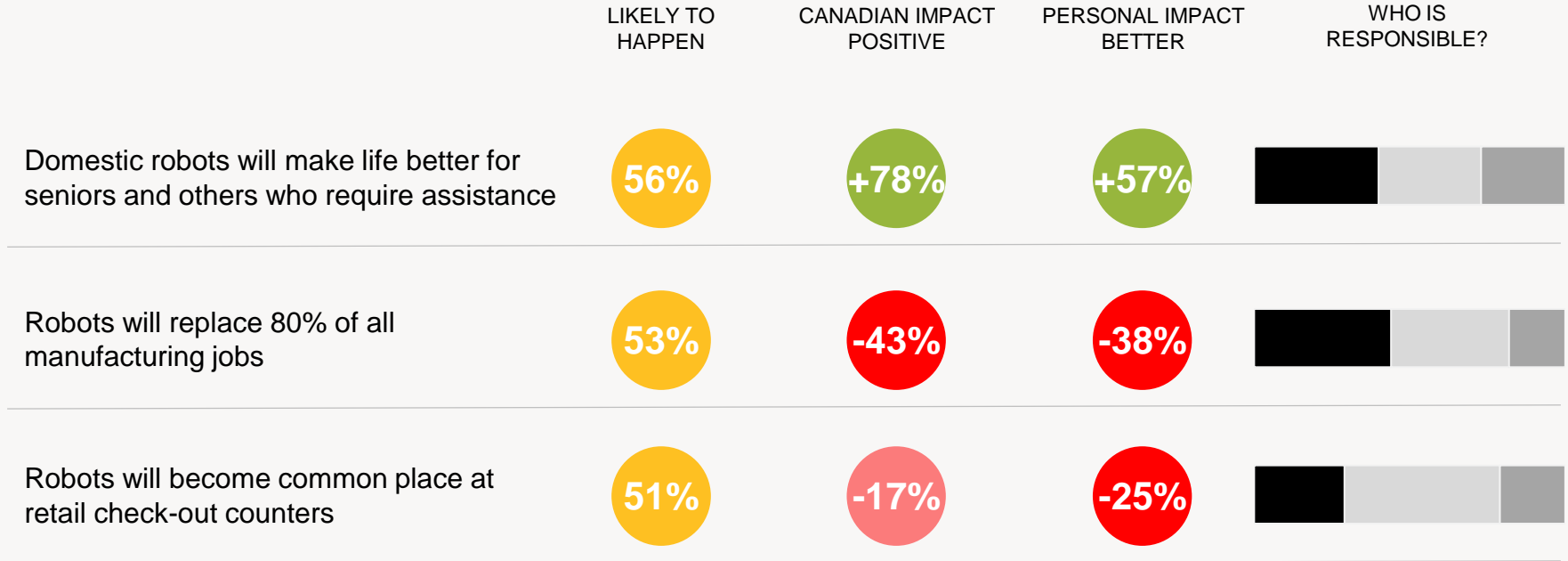
AUTONOMOUS VEHICLES AND DRONES

GOVERNMENT ■
 BUSINESSES ■
 CITIZENS ■



AI AND ROBOTS

GOVERNMENT ■
 BUSINESSES ■
 CITIZENS ■



More Driverless Cars than Cars with Drivers in The Future



32% agree that autonomous vehicles will make our roads safer

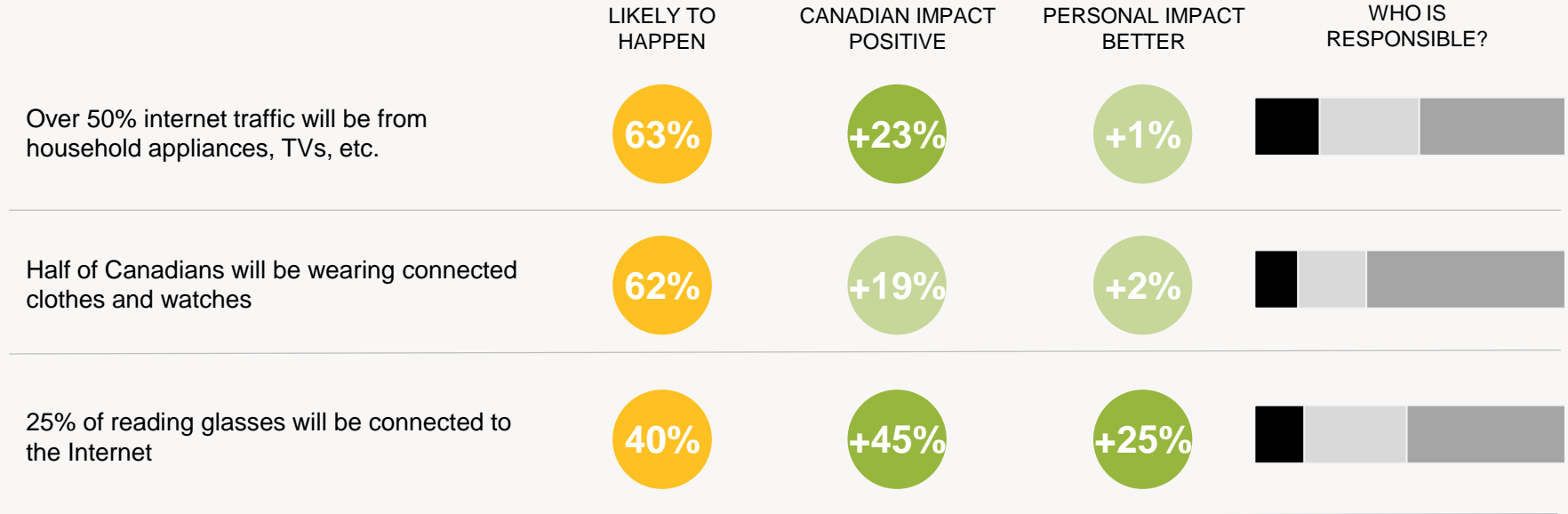
51% agree with the statement “I don’t trust the technology behind driverless cars”



THE WORLD RUNS ON DATA

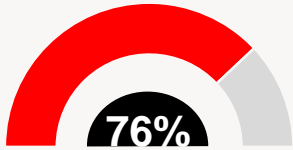
THE INTERNET OF THINGS = MORE DATA

GOVERNMENT ■
 BUSINESSES ■
 CITIZENS ■



THE DOWNSIDE OF BIG DATA & GREATER CONNECTIVITY

LIKELY TO HAPPEN



There will be a massive personal data leak leading **to the demise of a top ten company**



Canada will experience a major act of **cyber terrorism temporarily shutting down telecommunications, banking, electricity and transportation systems.**

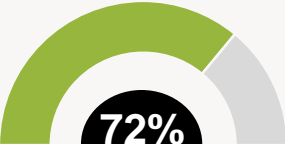
69% agree, that when they think about future advances in technology they are very worried about privacy and the security of their personal information

GOVERNMENT DATA BELONGS TO CITIZENS

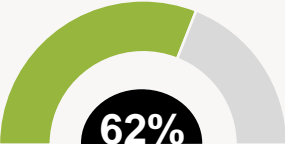
Agree



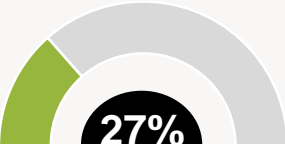
Data collected by governments should be owned by the citizens they collect it from.



Data generated by Canadians should be protected and regulated like a natural resource.



Private companies that use public data collected by governments should pay government a royalty fee.



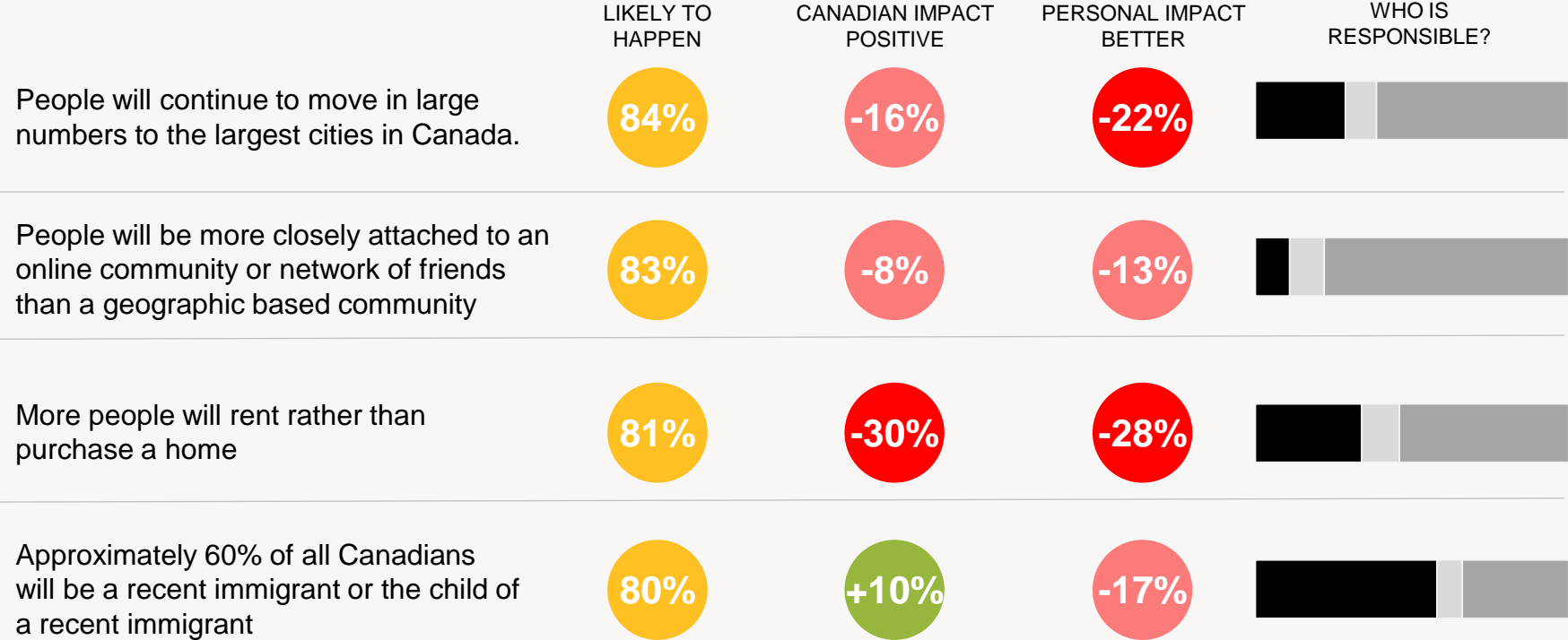
Data collected by government should be given freely to the private sector so that they can create products, services, jobs and economic growth.



**DO WE NEED A NEW DEFINITION
FOR COMMUNITY?**

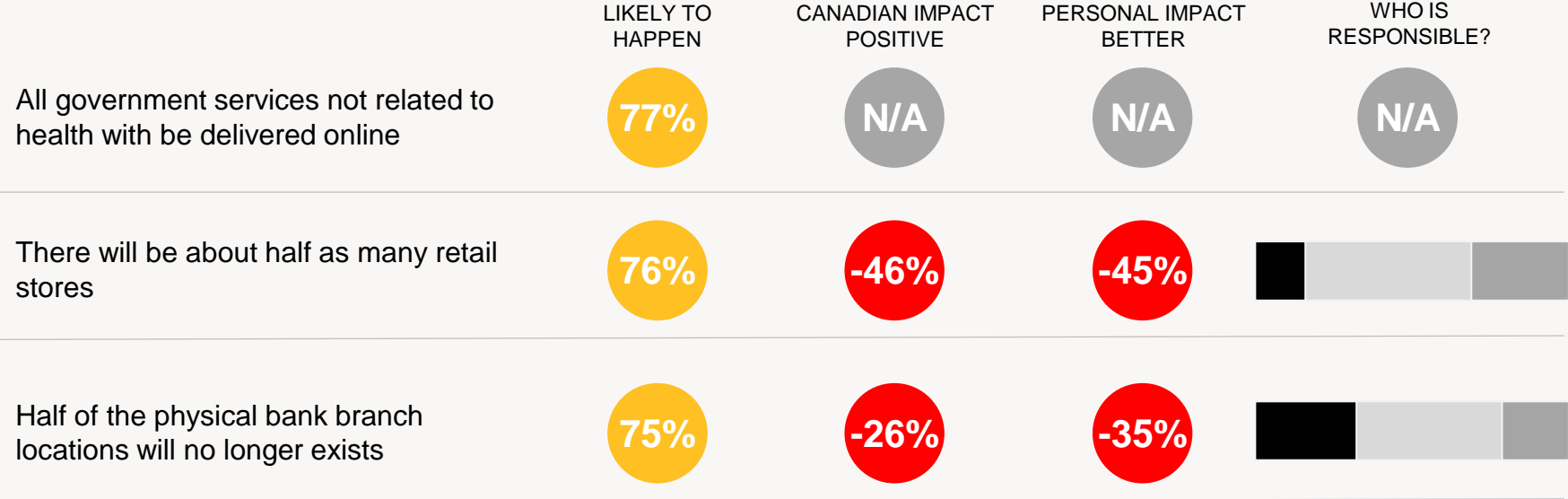
COMMUNITIES

GOVERNMENT ■
 BUSINESSES ■
 CITIZENS ■



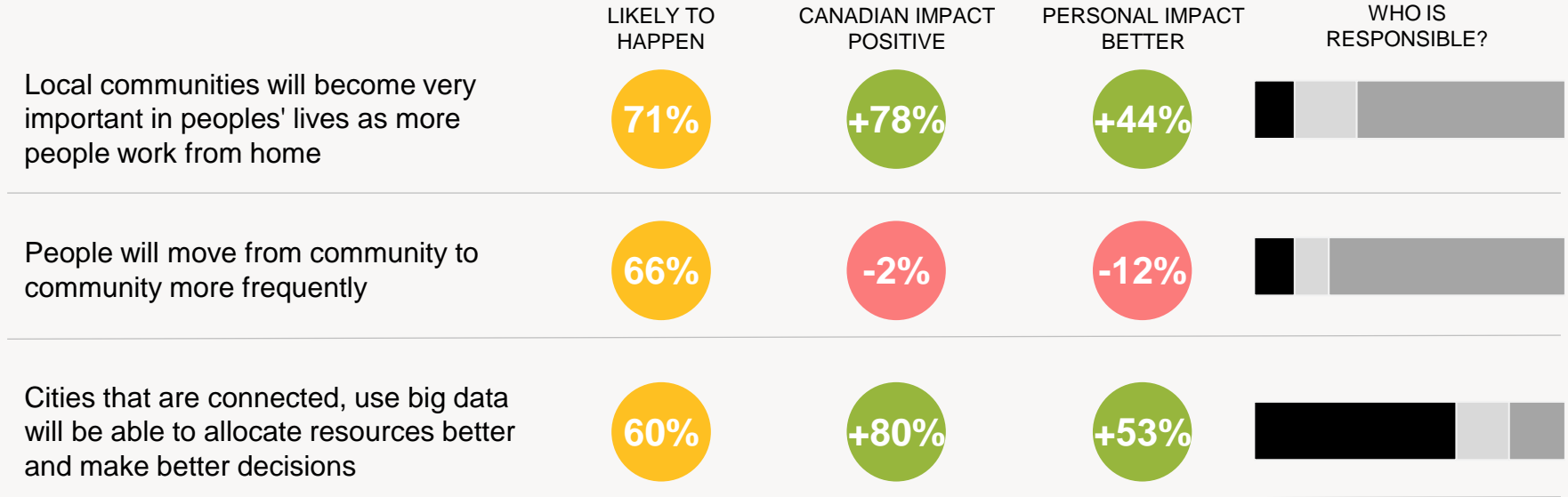
ONLINE WILL KILL BRICKS AND MORTAR

GOVERNMENT ■
 BUSINESSES ■
 CITIZENS ■






COMMUNITIES

GOVERNMENT ■
 BUSINESSES ■
 CITIZENS ■

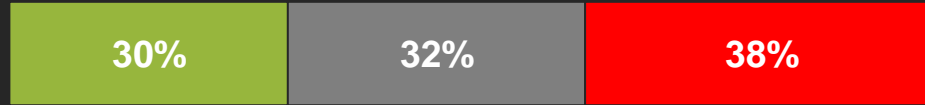


THE BIGGEST CHANGES WILL LEAD TO LESS OF CONNECTION BETWEEN PEOPLE

MORE CONNECTED 
NO IMPACT 
LESS CONNECTED 



MORE ETHNICALLY DIVERSE POPULATION

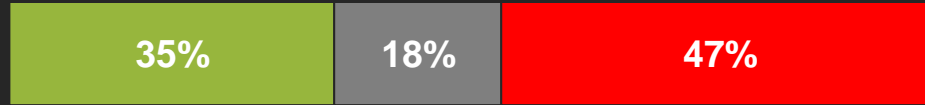


NET MORE
MINUS LESS

-8%



HIGHLY DIGITIZED SOCIETY



-12%



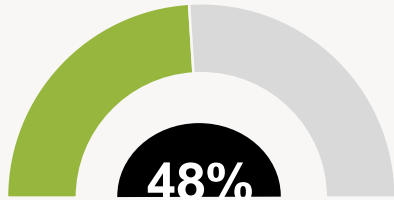
AN OLDER POPULATION



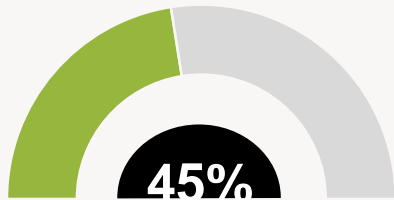
-20%

WE DON'T FEEL ALL THAT CONNECTED TO BEGIN WITH

Generally speaking, do you think that your outlook on life, your opinions on issues that are important, etc. are the same or different than...?



Other Canadians



Other people in
your community

Same



Questions?



Sean Simpson
Vice President

✉ sean.simpson@ipsos.com

📞 +1 416 324 2002



Rhys Gibb
Vice President

✉ rhys.gibb@ipsos.com

📞 +1 604 329 1864

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GAME CHANGERS

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

We believe that our work is important. Security, simplicity, speed and substance applies to everything we do.

Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

“GAME CHANGERS” – our tagline – summarises our ambition.