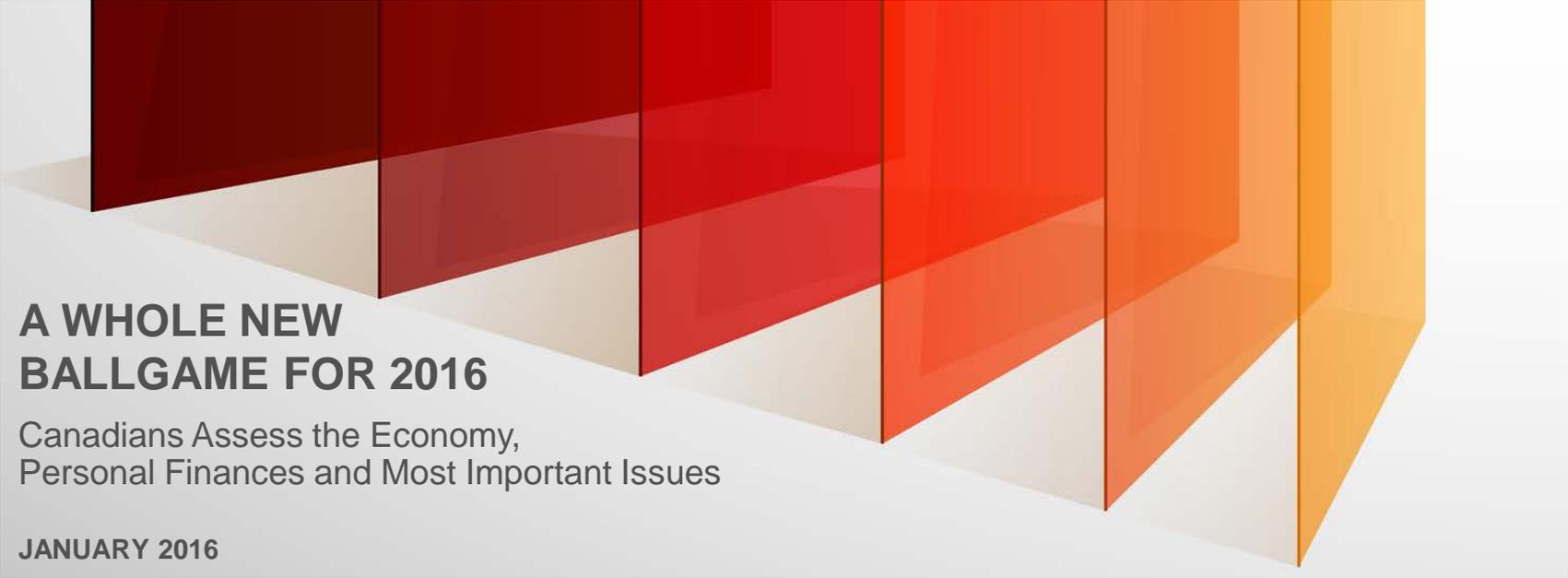


# PUBLIC PERSPECTIVES

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## A WHOLE NEW BALLGAME FOR 2016

Canadians Assess the Economy,  
Personal Finances and Most Important Issues

JANUARY 2016



# GENERAL THEMES FROM THE DATA ARE...

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## IT'S THE ECONOMY

Any question about whether or not Canadians' have noticed the economic downturn can be put to rest. Canadians' assessments of the national economy have plummeted, dragging down their views on the condition of their personal finances and prospects for improvement in the near-term future.

## BUT SOME NEW ISSUES ARE ON THE MOVE

While Canadians continue to rank unemployment/jobs, healthcare, taxes and poverty/social inequality on top of their national issue priority list, other issues have caught their attention recently including immigration control, terrorism and climate change.

## POTENTIAL FOR PROVINCIAL DISAGREEMENT HIGH

Residents in each region differ in the issues that they see as national priorities. Unemployment/jobs is a particular focus in Ontario and especially Alberta, while healthcare occupies top spot in BC, Prairies and Quebec. Climate change emerges as a top 5 ranked issue in Atlantic Canada, but ranks down the list in other regions.

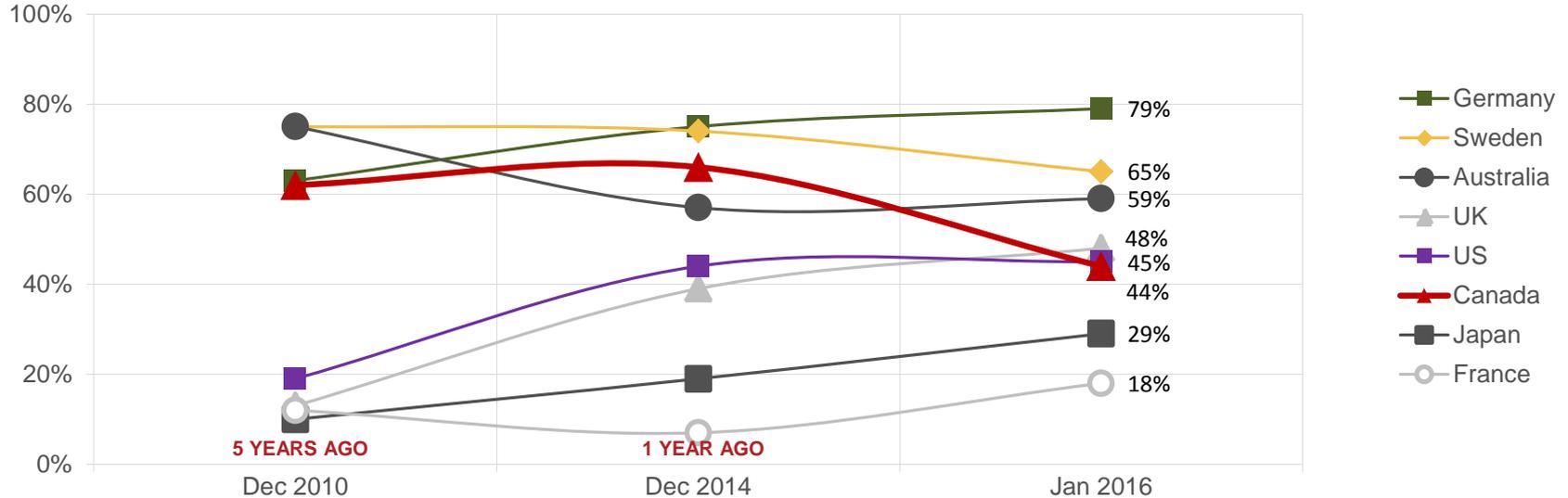
Needless to say that the new federal government will be challenged in building widespread regional consensus on the priority issues for moving the country forward.

# ECONOMIC ASSESSMENTS

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# CANADA MOVING OPPOSITE THAN MOST OTHER COUNTRIES IN RATING NATIONAL ECONOMY

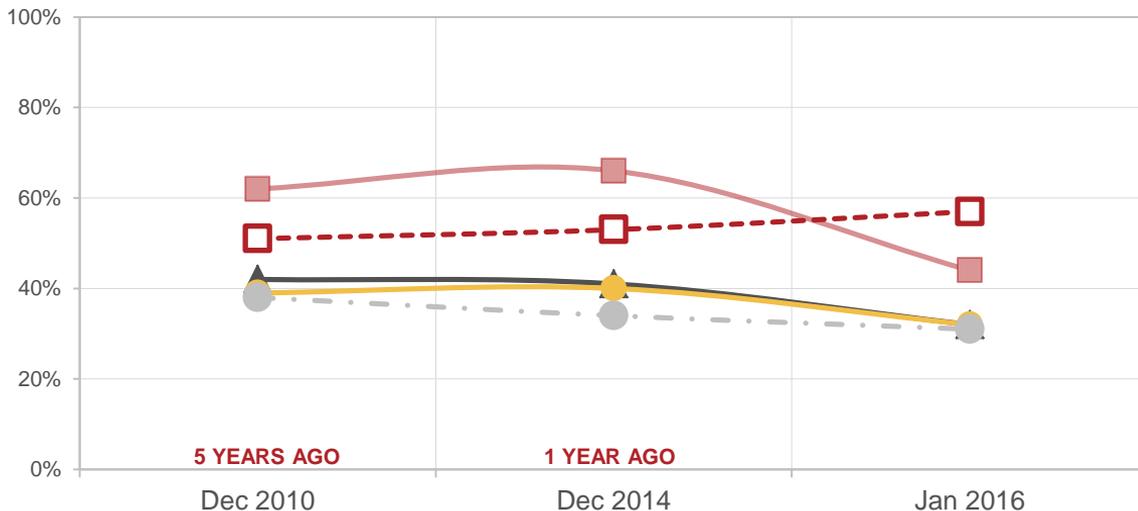
TRACKING RATING NATIONAL ECONOMY BY SELECT COUNTRIES (% rate "very/somewhat good")



Over the longer-term (5 year trend vs 2010), economic assessments have improved significantly in all countries, except Sweden and Canada where they have deteriorated and Australia where they dropped but have flattened out. In Canada, the drop of 22 percentage points from last year is startling.

# ALL ECONOMIC ASSESSMENTS TRENDING DOWN

## ALL CANADIANS—TRACKING ECONOMIC AND COUNTRY DIRECTION ASSESSMENTS



**57% COUNTRY HEADING RIGHT TRACK**

**44% NATIONAL ECONOMY**  
– Very Good/Somewhat Good

**32% PERSONAL FINANCES**  
– Rate 5-7 scale 1-7

**32% LOCAL ECONOMY**  
– Rate 5-7 scale 1-7

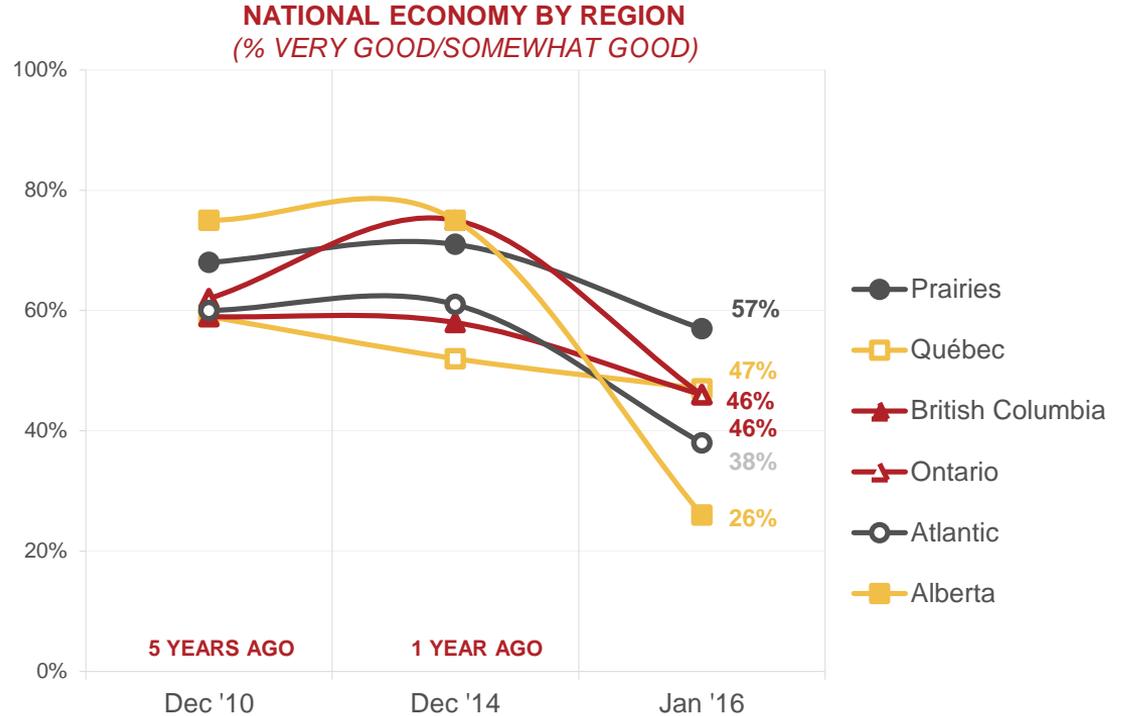
**31% PERSONAL FINANCES IN 6 MONTHS**  
– Much/Somewhat Stronger

National Economy - Now, thinking about our economic situation, how would you describe the current economic situation in ...? Is it...; Local Economy - 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; 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?; Personal Finances - 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.; Personal Finances 6 months - 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?

Canadians are entering 2016 with more critical assessments of the national economy, their local economy and their personal finances over the shorter-term (1 year trend vs 2014) and longer-term (5 year trend vs 2010). The recent election has clearly given Canadians some hope (a small increase in beliefs that the country is heading in the right direction), although with their financial opinions declining this could be short-lived.

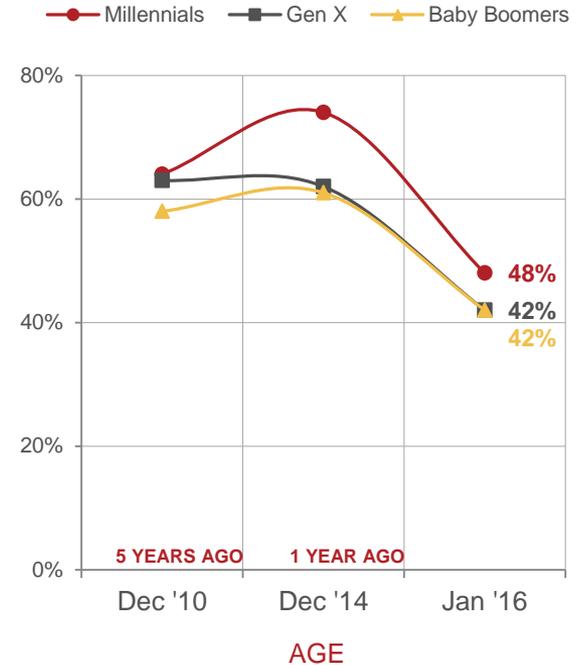
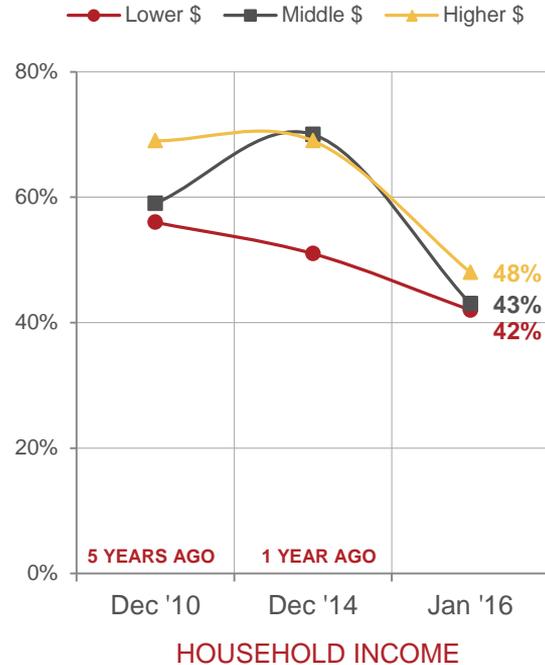
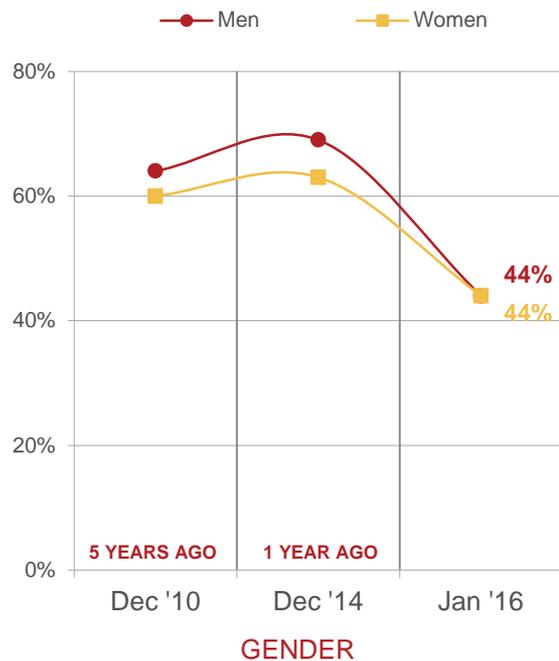
# ALBERTA DROPPING MOST

Residents in all regions have pulled back in their assessments of the condition of the national economy. The steepest declines are evident in Ontario (down 29 percentage points) and especially Alberta (down 49 percentage points) from the same time last year.



# DEMOGRAPHIC GROUPS HAVE MERGED IN GENERAL AGREEMENT ABOUT THE STATE OF THE ECONOMY

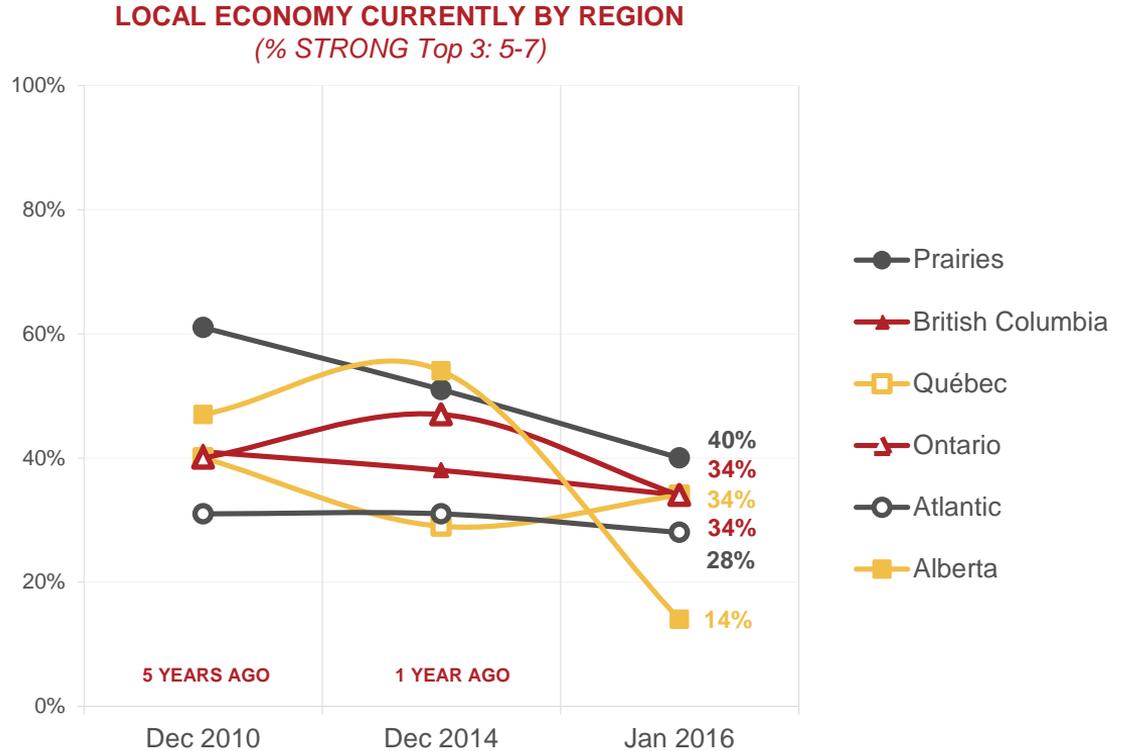
**NATIONAL ECONOMY BY SELECT DEMOGRAPHICS**  
(% VERY GOOD/SOMEWHAT GOOD)



# ALBERTA PLUMMETS IN ASSESSING LOCAL ECONOMY

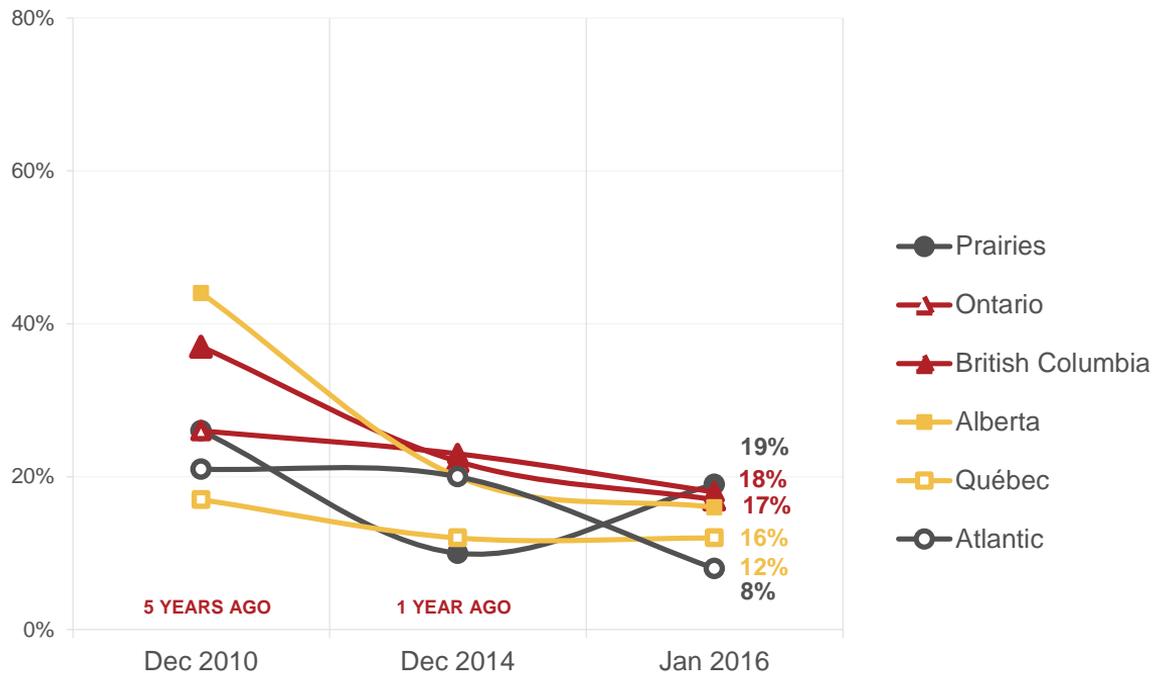
Canadians have historically rated the condition of their local economy a bit lower than the national economy. This continues to be the case. Similar to the national assessment, all regions have trended down with respect to their local economy except Quebec, but most precipitously Alberta.

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 6 months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?



# NO REGION PARTICULARLY OPTIMISTIC ABOUT THE PROSPECTS FOR THEIR LOCAL ECONOMY IN 6 MONTHS

**LOCAL ECONOMY IN SIX MONTHS BY REGION**  
 (% MUCH STRONGER / SOMEWHAT STRONGER)



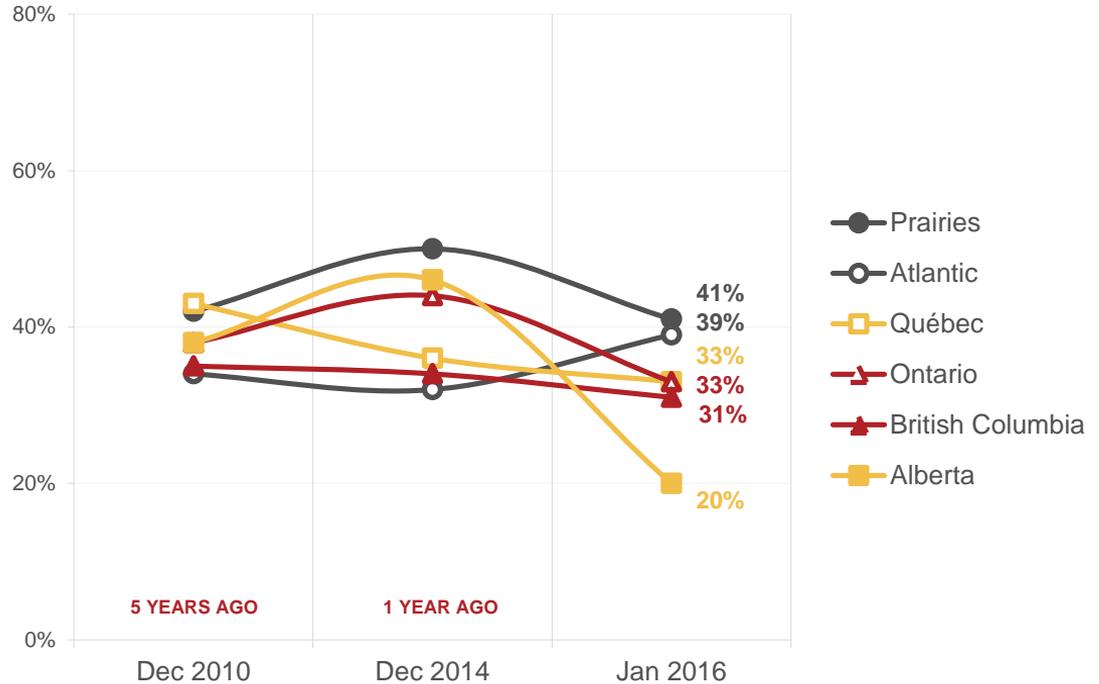
Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy. Looking ahead 6 months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now?

# PRAIRIES, ONTARIO DOWN ON PERSONAL FINANCES

While there was some improvement in many regions in their assessments of their personal finances up until last year, this has been reversed, except in Atlantic Canada, but again most precipitously in Alberta.

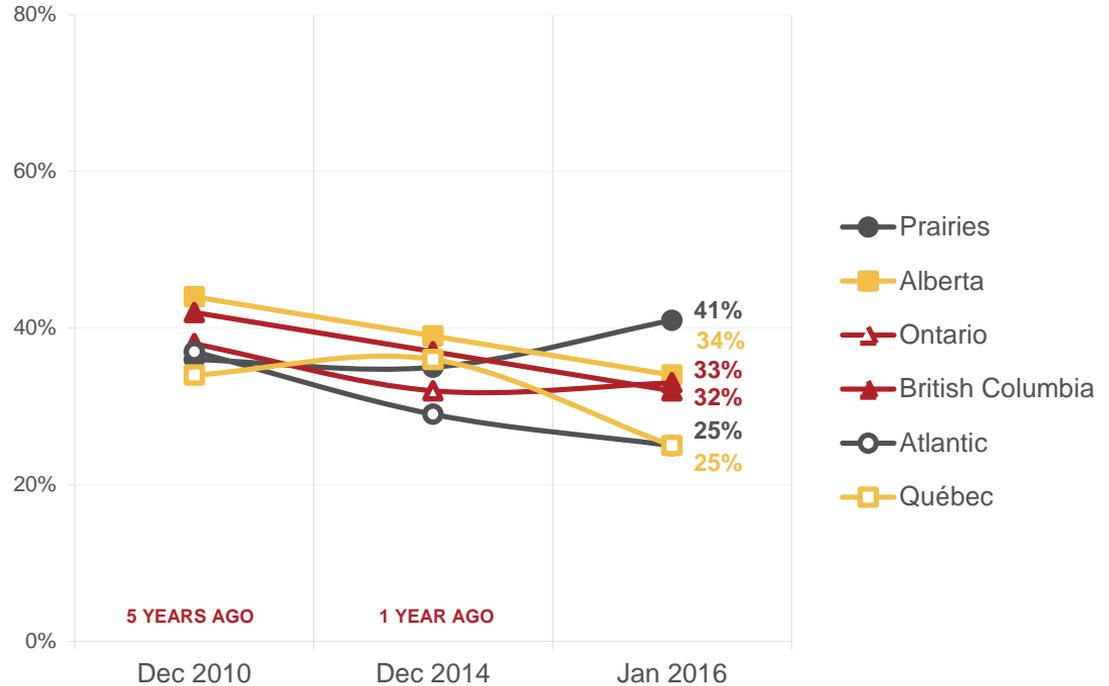
Rate your current financial situation, using a scale from 1 to 7, where 7 means your personal financial situation is very strong today and 1 means it is very weak. Looking ahead six months from now, do you expect your personal financial situation to be much stronger, somewhat stronger, about the same,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

**PERSONAL FINANCES CURRENTLY BY REGION**  
(% STRONG Top 3: 5-7)



# NO REGION PARTICULARLY OPTIMISTIC ABOUT THE PROSPECTS FOR THEIR PERSONAL FINANCES

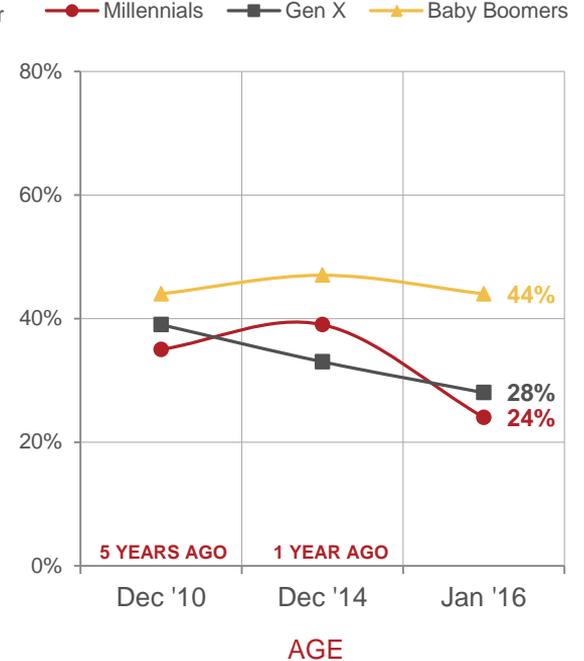
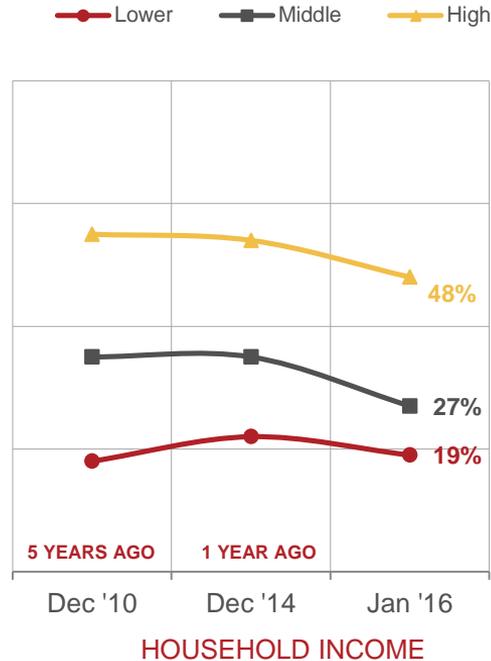
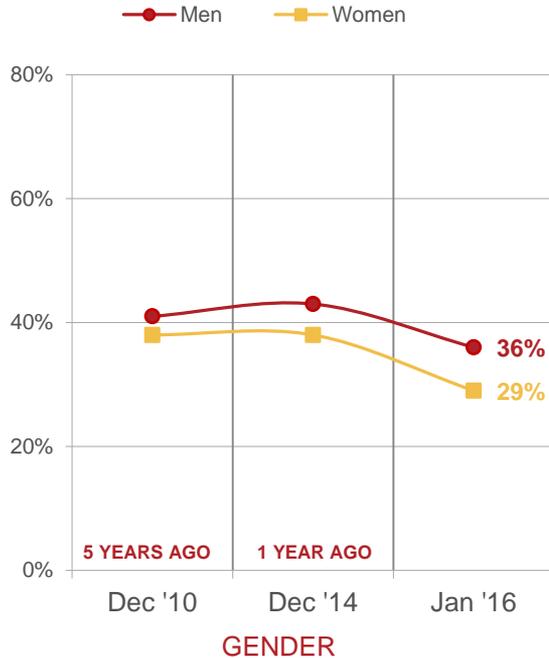
**PERSONAL FINANCES IN SIX MONTHS BY REGION**  
(% MUCH STRONGER / SOMEWHAT STRONGER)



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?

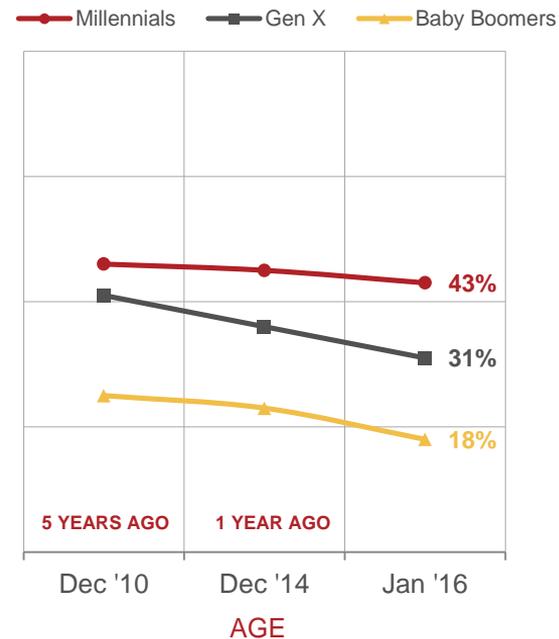
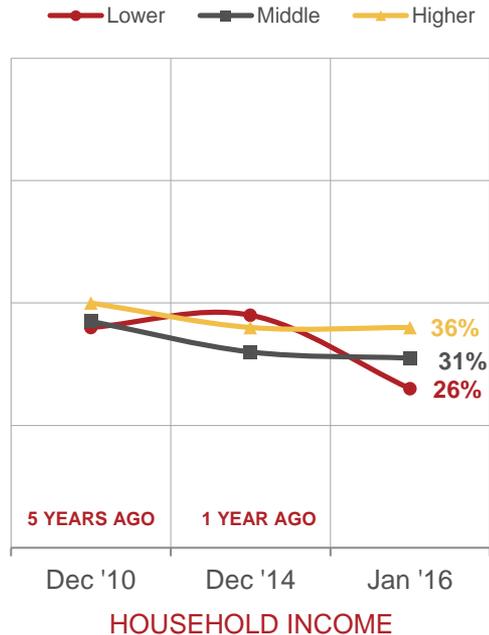
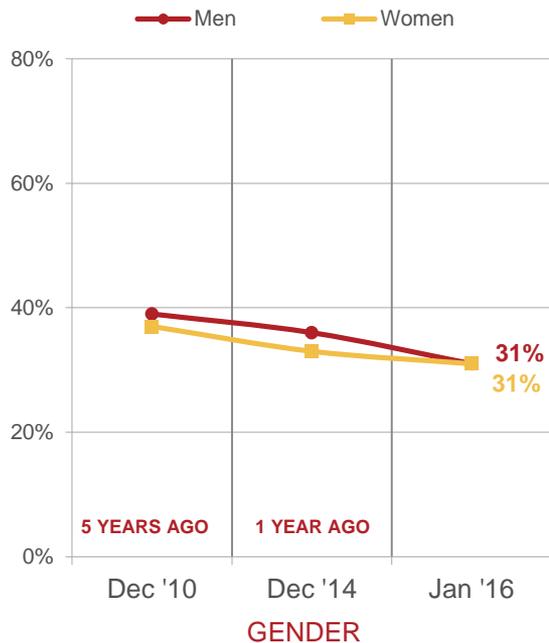
# WOMEN, LOWER INCOME AND MILLENNIALS REPORT LOWEST PERSONAL FINANCIAL SITUATION

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



# LOWER INCOME, GEN XERS AND BABY BOOMERS BIGGEST DECLINE IN OPTIMISM FOR THEIR PERSONAL FINANCES

**PERSONAL FINANCES IN SIX MONTHS BY SELECT DEMOGRAPHICS**  
(% 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?

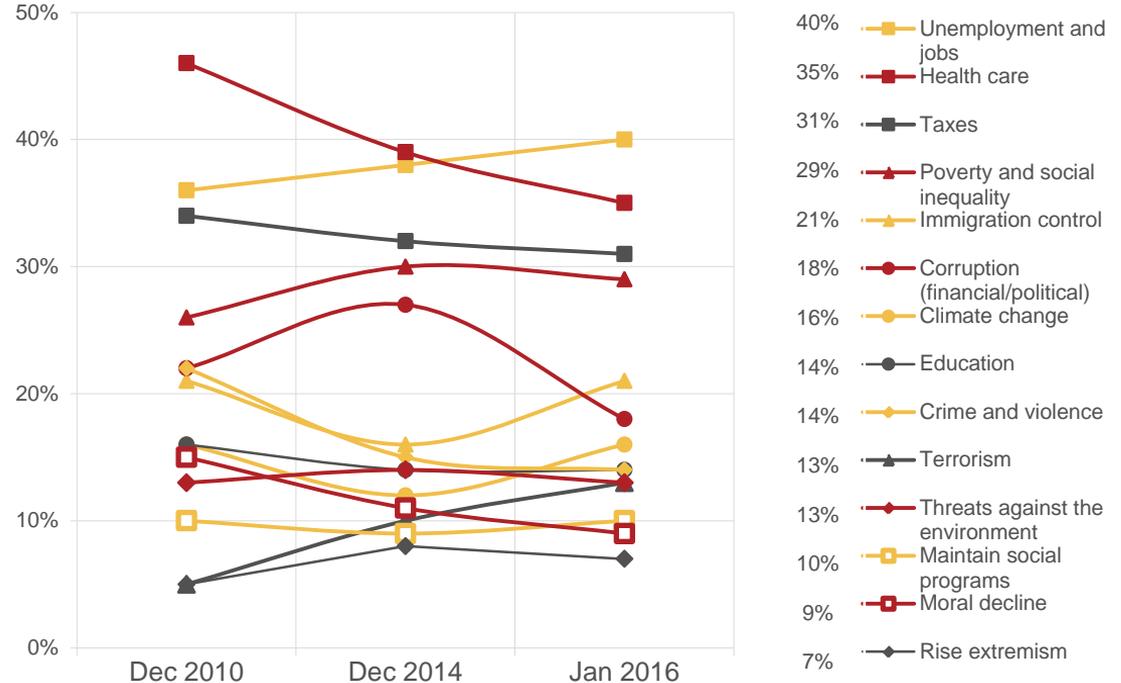
# IMPORTANT NATIONAL ISSUES

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# UNEMPLOYMENT/JOB, IMMIGRATION CONTROL, TERRORISM, CLIMATE CHANGE UP ON ISSUE AGENDA

The national issue agenda among Canadians continues to evolve over the short and long-term. Healthcare, unemployment/jobs, taxes, and poverty/social inequality continue to occupy the top four spots, with unemployment/jobs emerging atop the list. Immigration control, terrorism and climate change have increased recently to close the gap.

**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)

# THE RANKING OF THE TOP NATIONAL ISSUES OFTEN VARIES BY PROVINCE

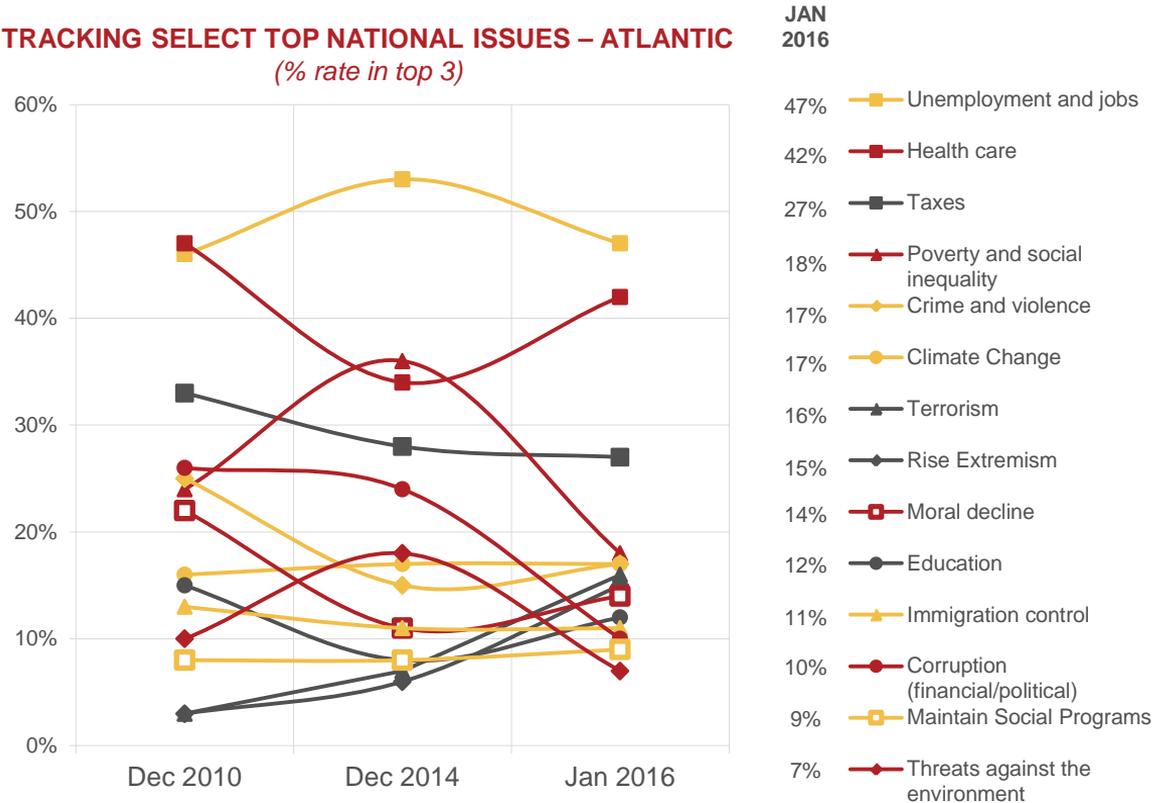
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Top 5 Current Issues (Jan '16) (Rank out of 14 issues)

	BC	Alberta	Prairies	Ontario	Quebec	Atlantic
Healthcare	1		1	4	1	2
Unemployment/jobs	2	1		1	4	1
Poverty/Social Inequality	3	3	3	3	3	4
Taxes	4		2	2	2	3
Immigration Control	5	2	5	5		
Crime/Violence		4	4			5
Corruption		5			5	
Education					5	
Climate Change						5

# UNEMPLOYMENT/JOB AND HEALTHCARE DOMINATE IN ATLANTIC CANADA

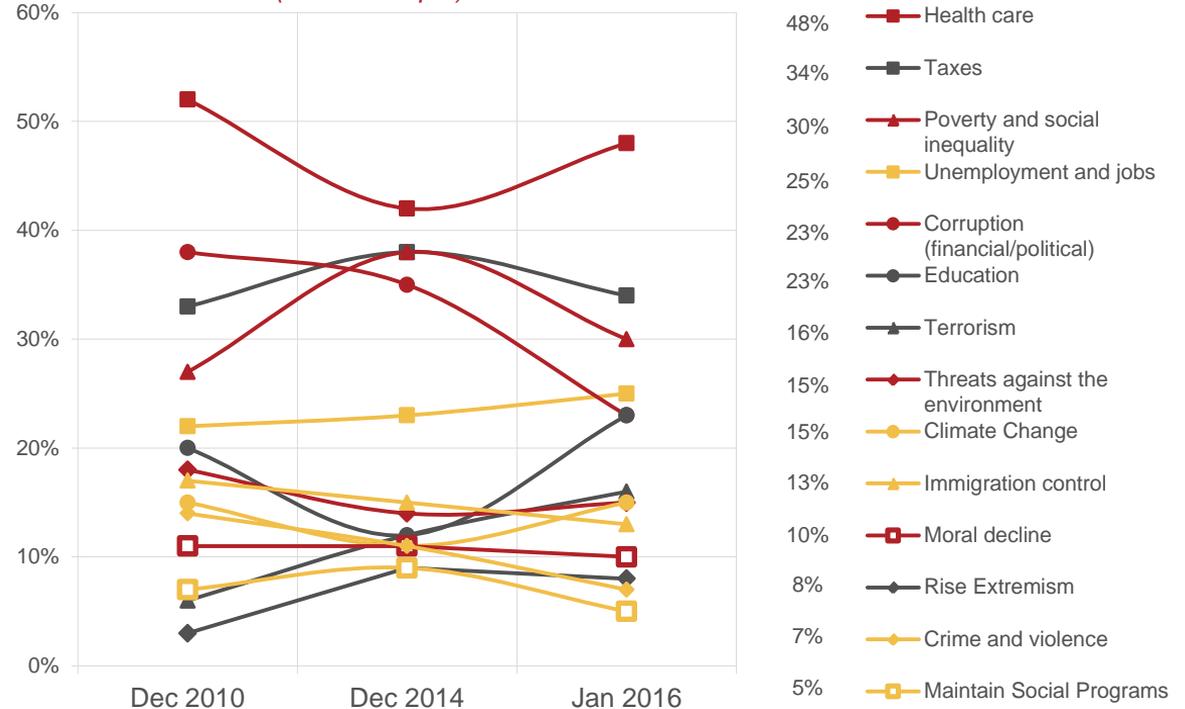
**TRACKING SELECT TOP NATIONAL ISSUES – ATLANTIC**  
 (% rate in top 3)



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

# QUEBECERS ARE FOCUSED ON HEALTHCARE

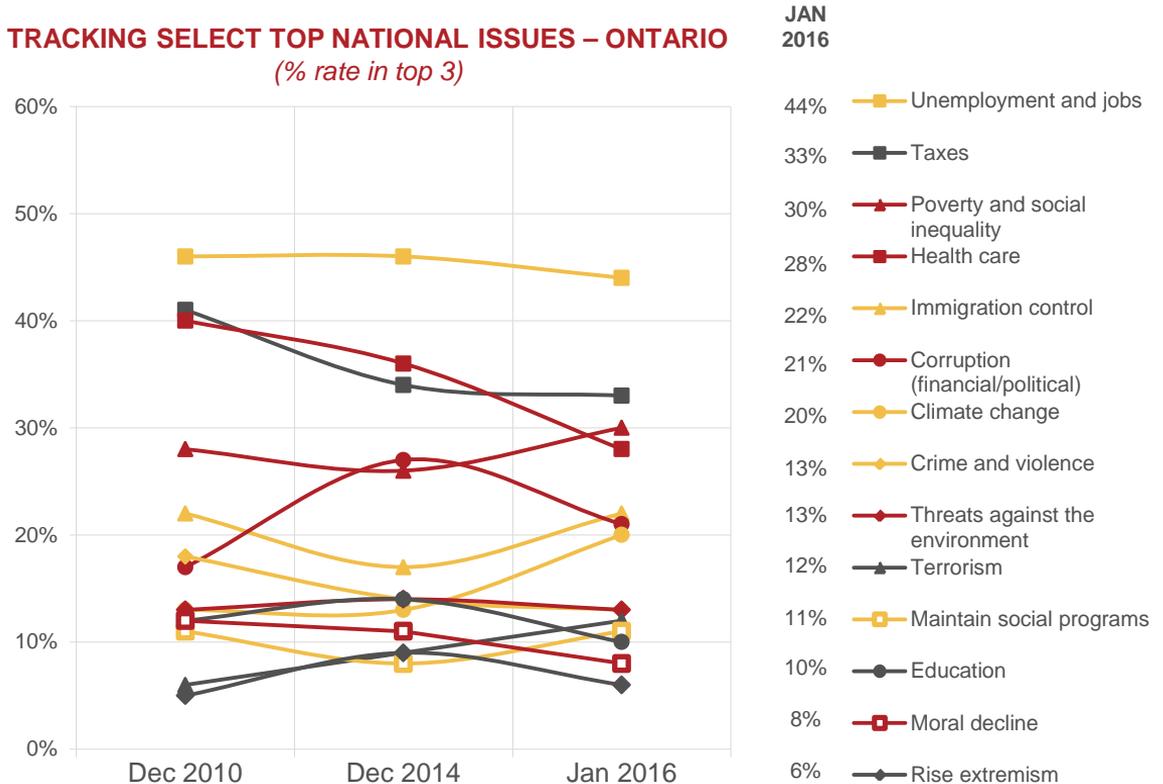
TRACKING SELECT TOP NATIONAL ISSUES – QUEBEC  
(% rate in top 3)



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

# UNEMPLOYMENT/JOB'S CONTINUES TO RANK FIRST AMONG ONTARIANS

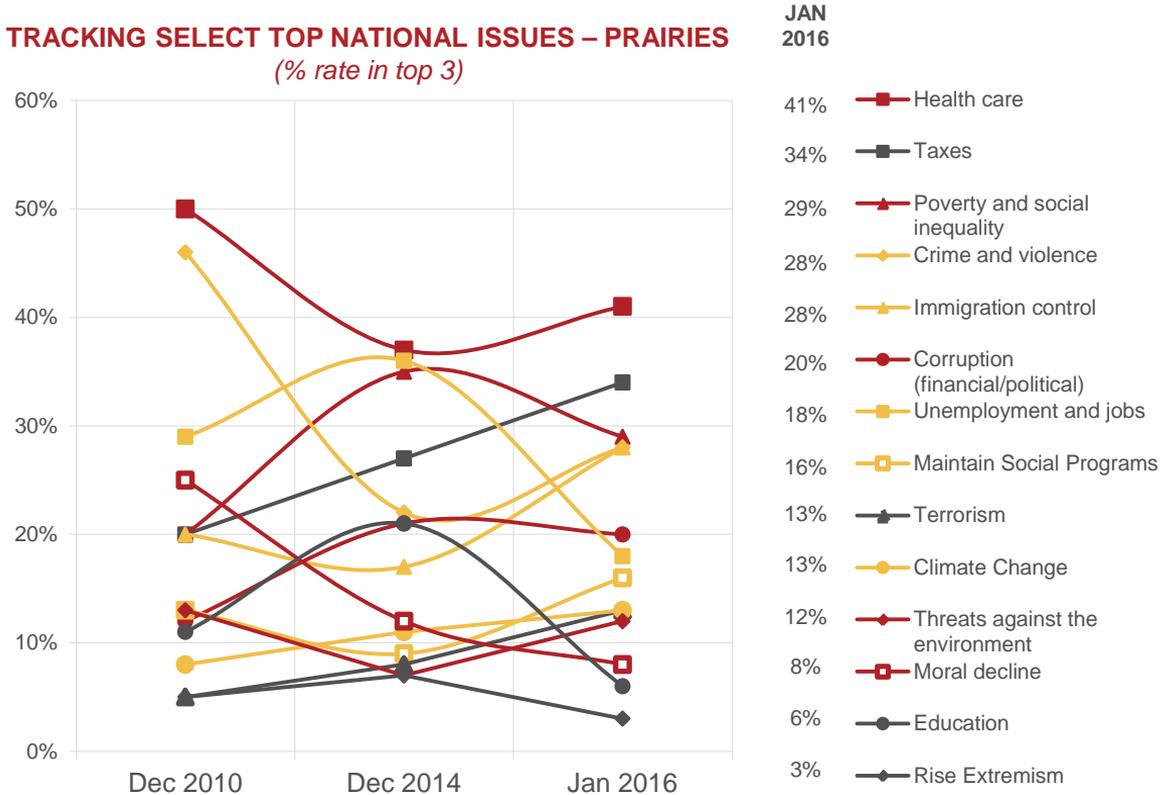
TRACKING SELECT TOP NATIONAL ISSUES – ONTARIO  
(% rate in top 3)



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

# HEALTHCARE TOPS AMONG PRAIRIE RESIDENTS; TAXES JUMPS TO SECOND

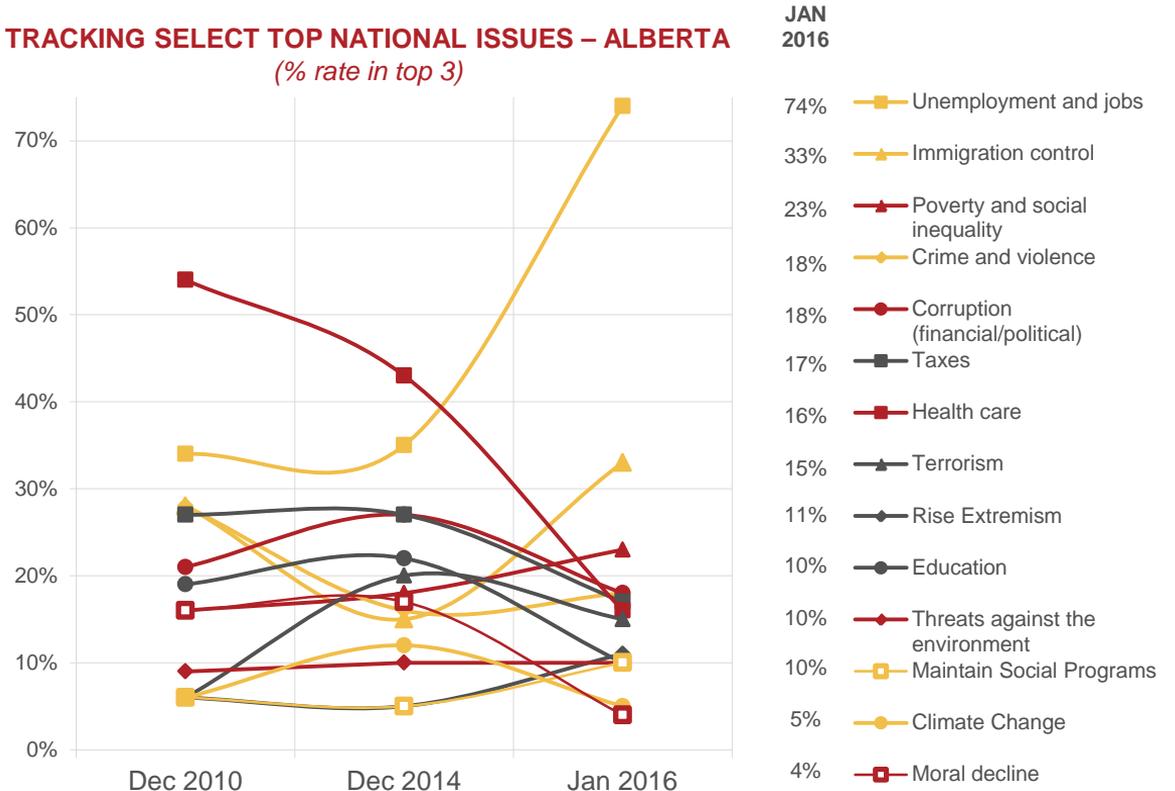
TRACKING SELECT TOP NATIONAL ISSUES – PRAIRIES  
(% rate in top 3)



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

# ALBERTANS OBSESSED WITH UNEMPLOYMENT/JOB; IMMIGRATION CONTROL JUMPS TO SECOND

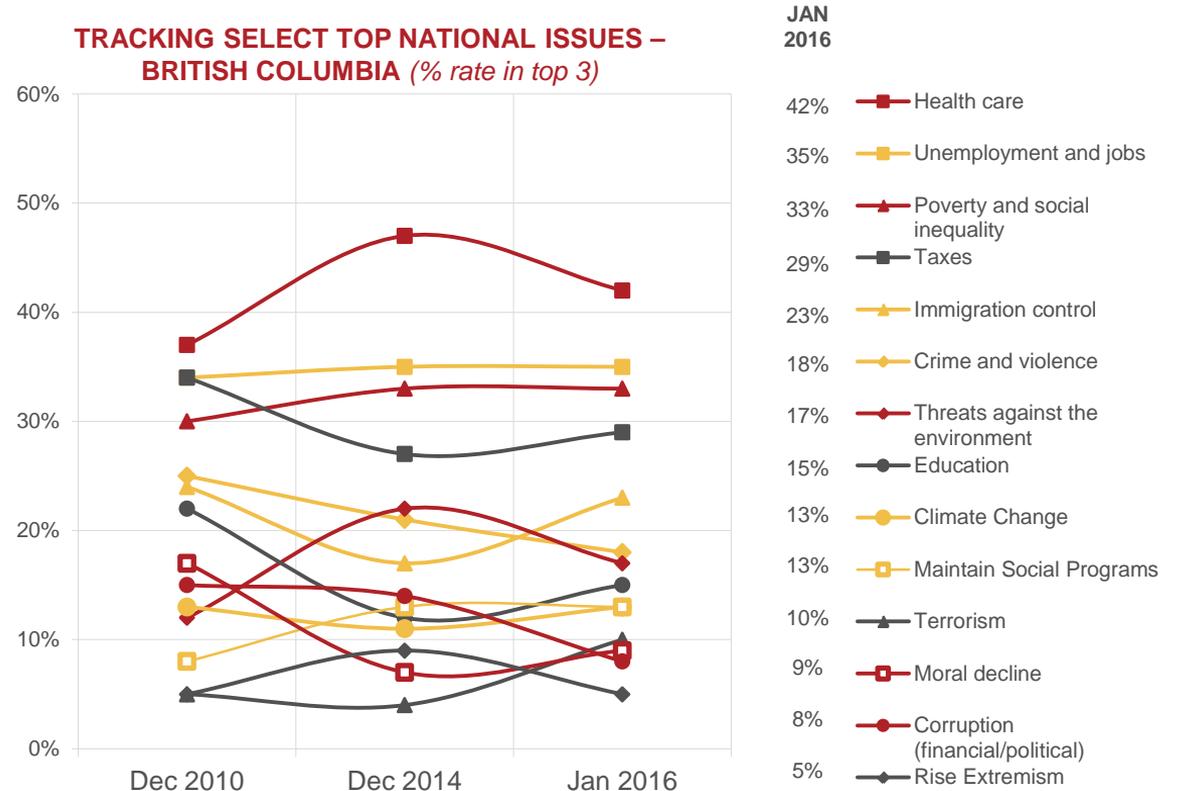
TRACKING SELECT TOP NATIONAL ISSUES – ALBERTA  
(% rate in top 3)



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

# BRITISH COLUMBIANS RANK HEALTHCARE FIRST; IMMIGRATION CONTROL BIGGEST INCREASE

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



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

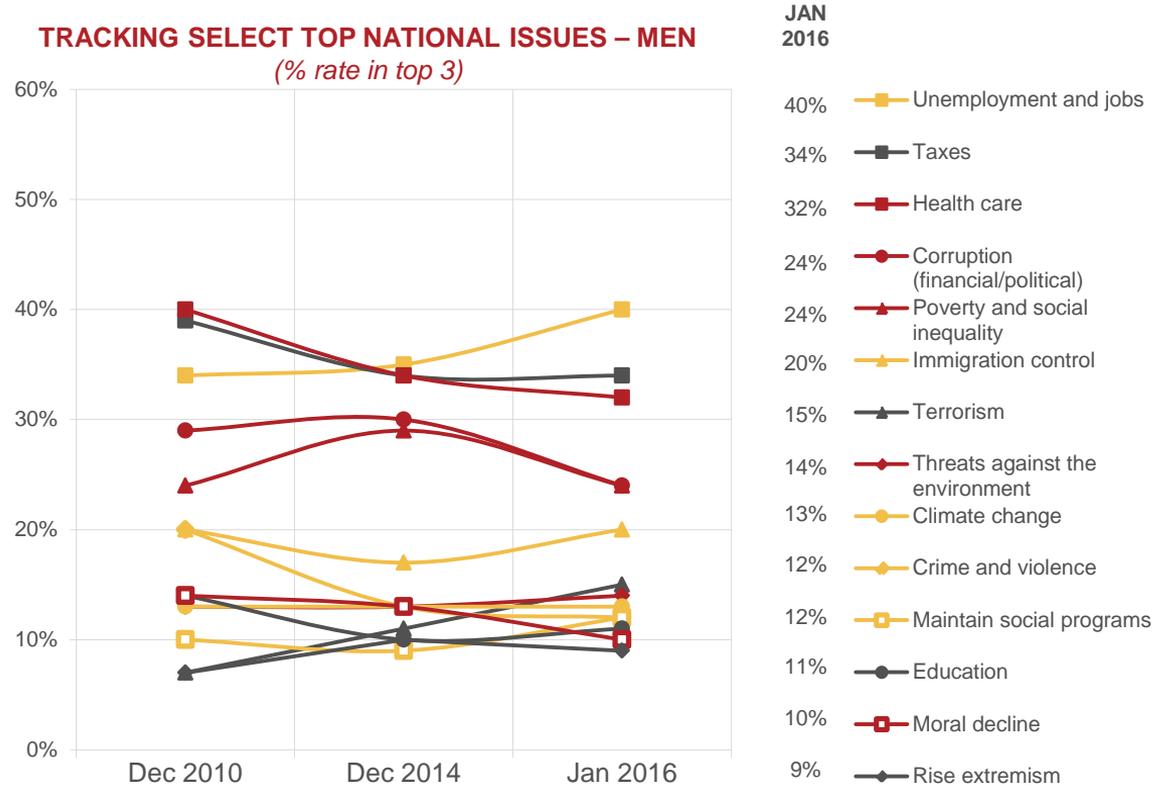
# THE RANKING OF THE TOP NATIONAL ISSUES IS MORE COMMON ACROSS DEMOGRAPHICS

Top 5 Current Issues (Jan '16) (Rank out of 14 issues)

	Men	Women	Lower \$	Middle \$	Higher \$	Millennials	Gen X	Boomers
Unemployment/Jobs	1	1	1	1	1	1	1	2
Taxes	2	4	4	4	1	3	3	3
Healthcare	3	2	3	3	1	2	2	1
Corruption	4		5		4			
Poverty/Social Inequality	4	3	2	2	2	4	4	4
Immigration Control	5	5	5	5	3	5	5	5
Climate Change					5			
Terrorism					5			

# UNEMPLOYMENT/JOB BREAKS FROM THE PACK AMONG MEN

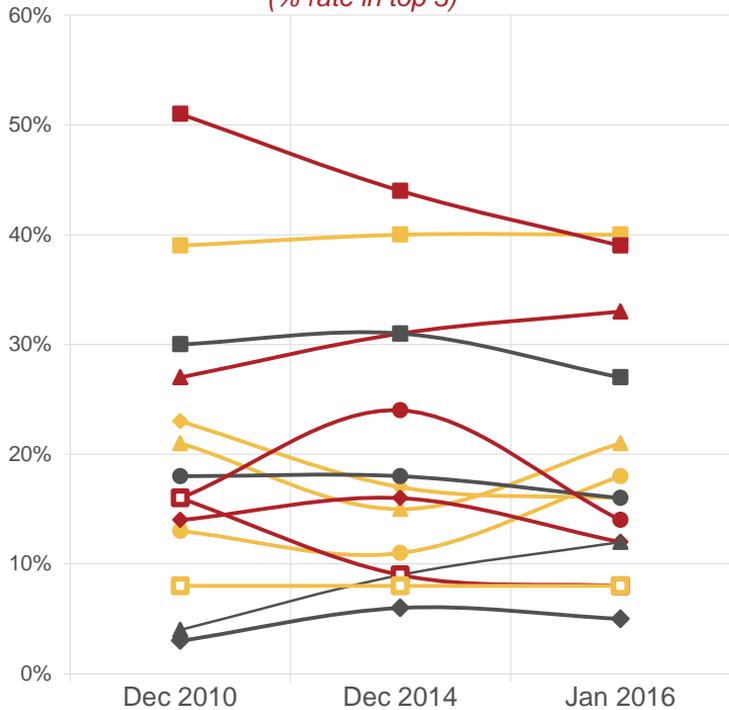
TRACKING SELECT TOP NATIONAL ISSUES – MEN  
(% rate in top 3)



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

# UNEMPLOYMENT/JOB AND HEALTHCARE TOP THE AGENDA AMONG WOMEN; SOCIAL INEQUALITY CLIMBS

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

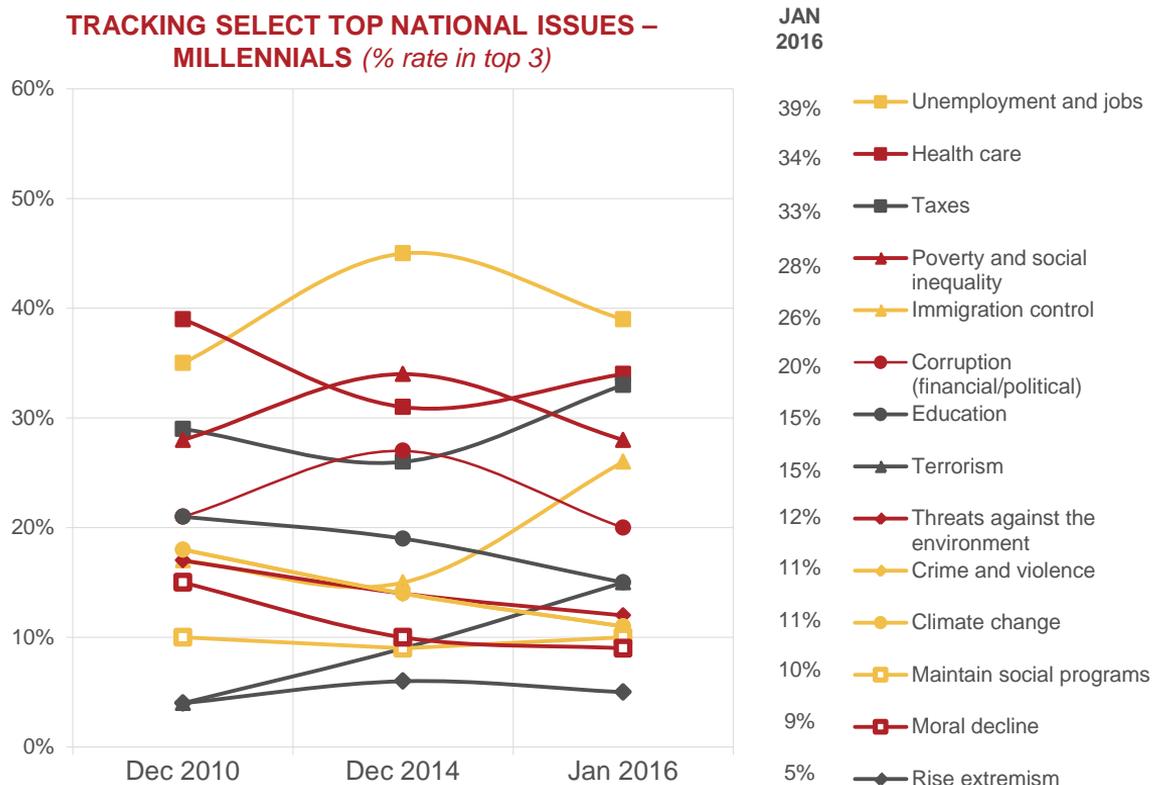


- JAN 2016**
- 40% — Unemployment and jobs
  - 39% — Health care
  - 33% — Poverty and social inequality
  - 27% — Taxes
  - 21% — Immigration control
  - 18% — Climate change
  - 16% — Crime and violence
  - 16% — Education
  - 14% — Corruption (financial/political)
  - 12% — Threats against the environment
  - 12% — Terrorism
  - 8% — Moral decline
  - 8% — Maintain social programs
  - 5% — Rise extremism

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

# CLUTTERED LIST OF TOP ISSUES AMONG MILLENNIALS; CLIMATE CHANGE NOT CAUGHT FIRE

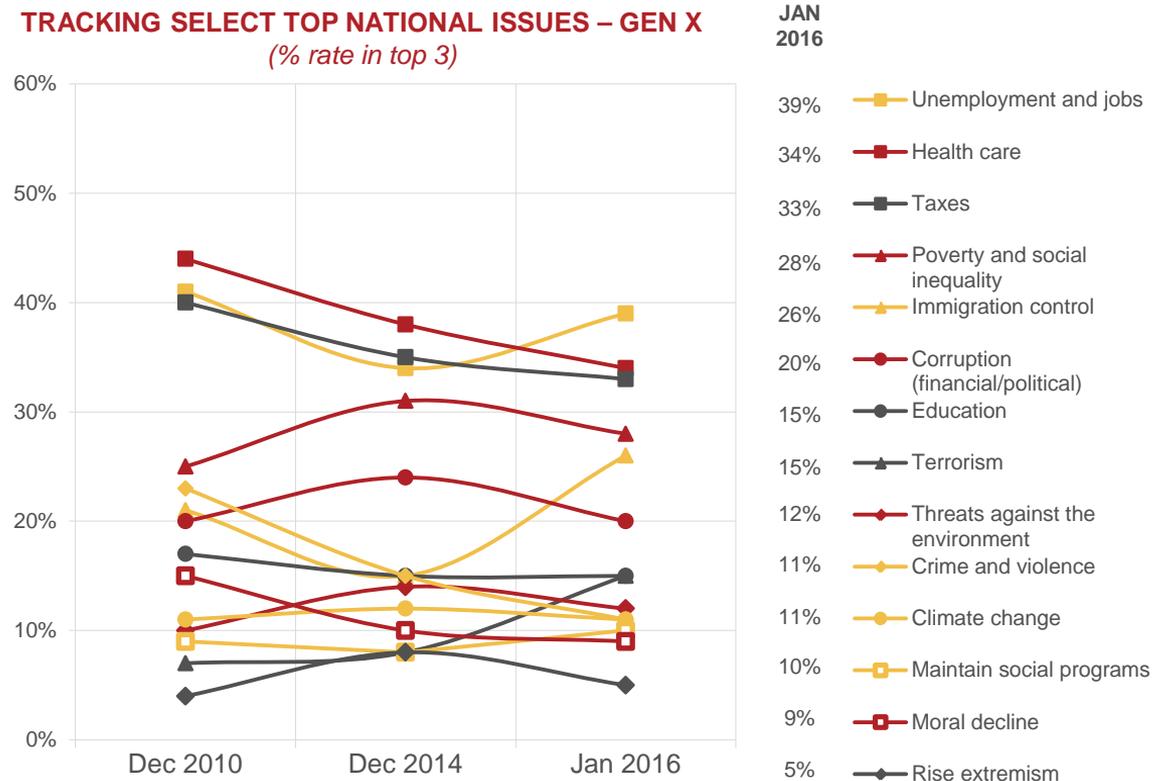
TRACKING SELECT TOP NATIONAL ISSUES –  
MILLENNIALS (% rate in top 3)



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

# UNEMPLOYMENT/JOB BREAKS FROM THE PACK AMONG GEN XERS; IMMIGRATION CONTROL CLIMBS

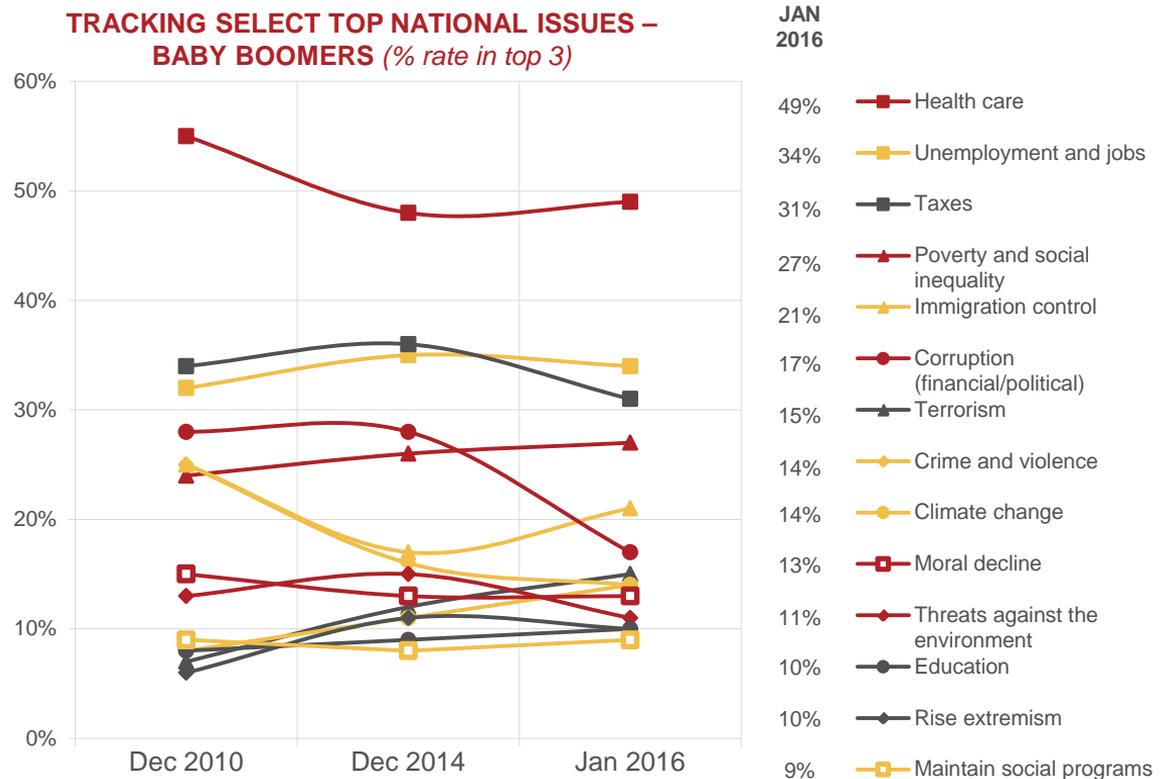
TRACKING SELECT TOP NATIONAL ISSUES – GEN X  
(% rate in top 3)



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

# HEALTHCARE CONTINUES TO TOP THE AGENDA AMONG BABY BOOMERS

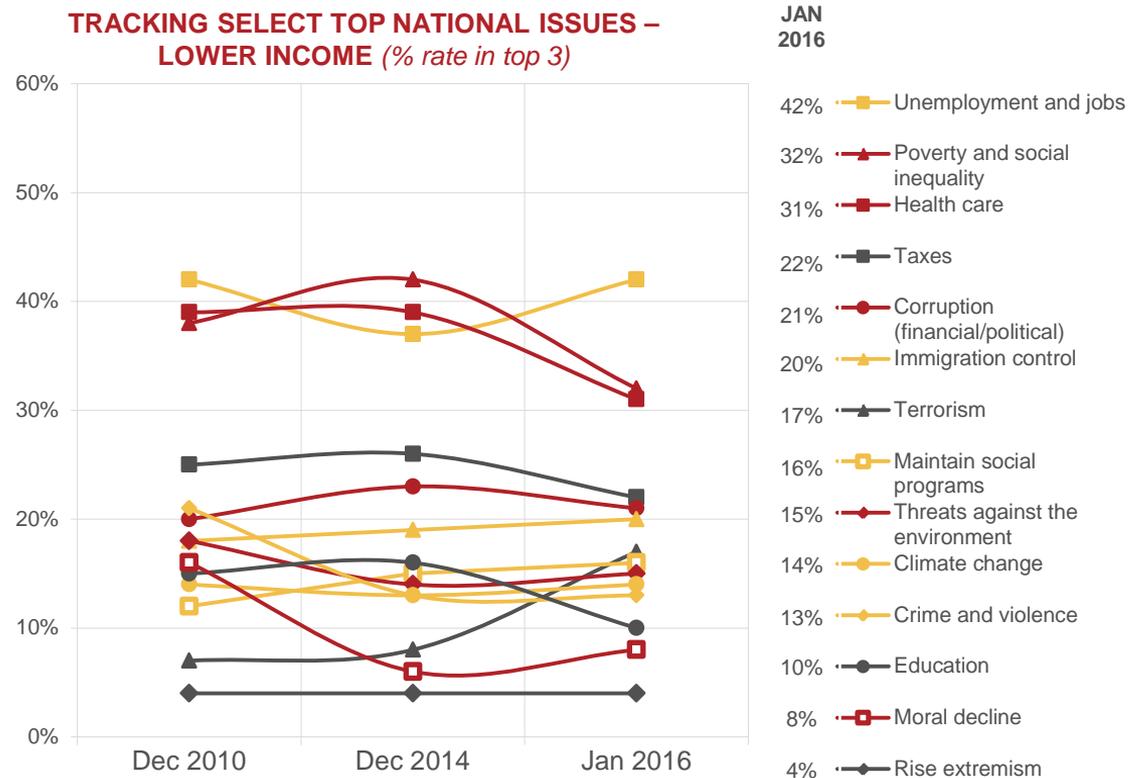
TRACKING SELECT TOP NATIONAL ISSUES –  
BABY BOOMERS (% rate in top 3)



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

# UNEMPLOYMENT/JOB TOPS THE LIST AMONG LOWER INCOME CANADIANS; TERRORISM CLIMBS

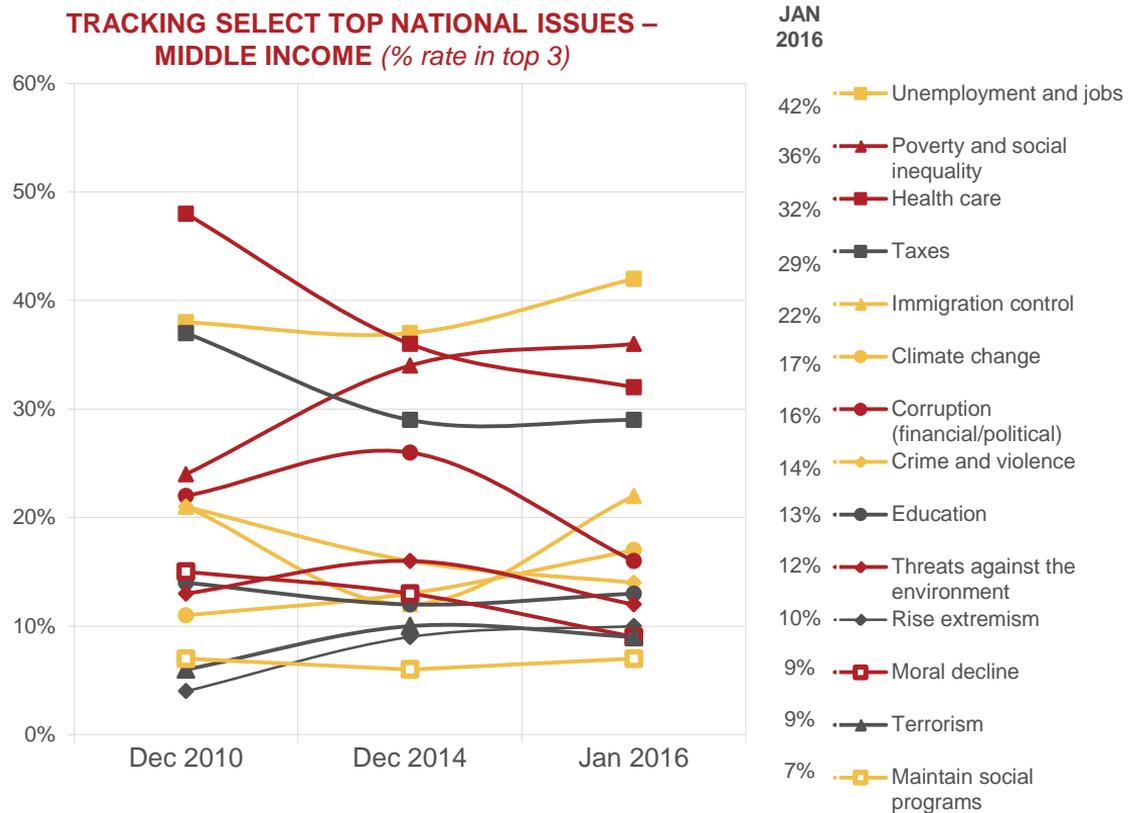
TRACKING SELECT TOP NATIONAL ISSUES –  
LOWER INCOME (% rate in top 3)



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

# UNEMPLOYMENT/JOB'S HIGHEST AMONG MIDDLE-INCOME CANADIANS; IMMIGRATION CONTROL CLIMBS

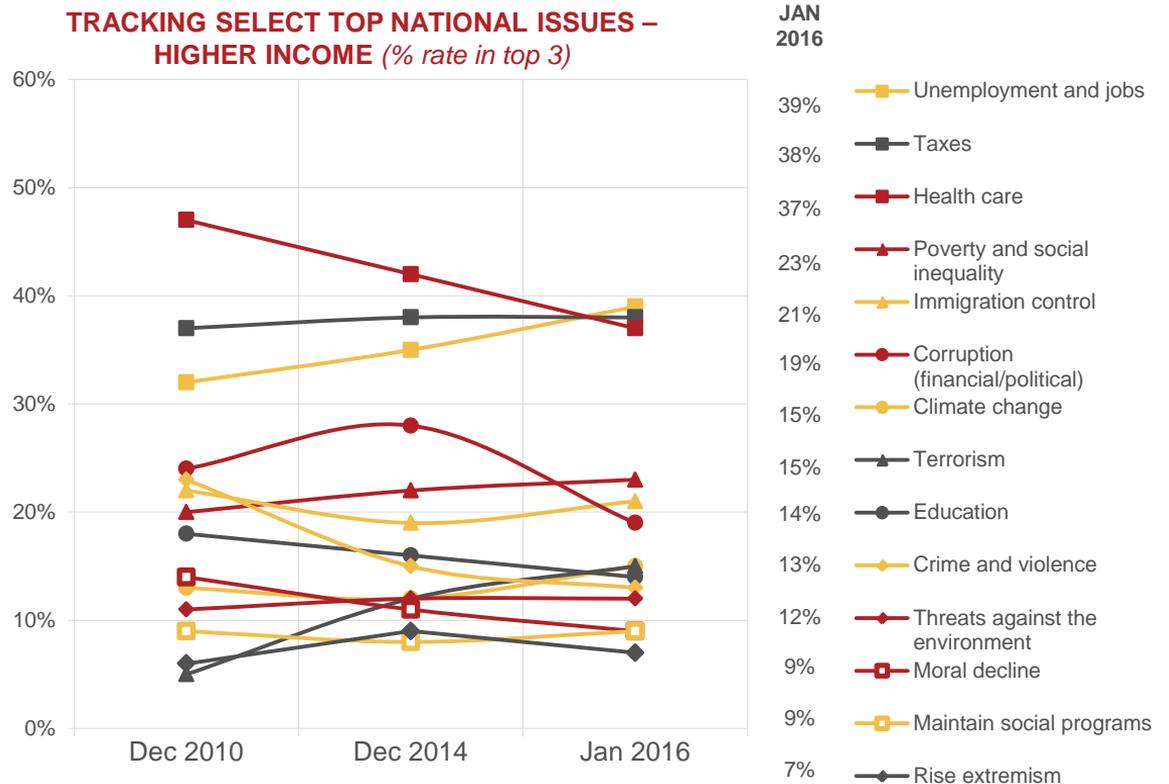
TRACKING SELECT TOP NATIONAL ISSUES –  
MIDDLE INCOME (% rate in top 3)



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

# MORE CLUTTERED LIST OF TOP ISSUES AMONG HIGHER-INCOME CANADIANS

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



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

# DATA FOR THIS REPORT WERE TAKEN FROM IPSOS GLOBAL @DVISOR

SURVEY METHOD	COUNTRIES	SAMPLE	WEIGHTING
<p>The survey instrument is conducted monthly in 24 countries around the world via the Ipsos Online Panel system. Data are normally collected in the 2<sup>nd</sup> and 3<sup>rd</sup> weeks of each month.</p>	<p>The countries normally included in the tracking include Argentina, Australia, Belgium, Brazil, Canada, China, France, Germany, Great Britain, Hungary, India, Indonesia, Italy, Japan, Mexico, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.</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, Indonesia, Mexico, 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>

# CONTACTS

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**Mike Colledge**  
President, Canadian Public Affairs

✉ [mike.colledge@ipsos.com](mailto:mike.colledge@ipsos.com)

📞 613.688.8971

@MikeDColledge



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**Chris Martyn**  
Chief Research Officer, Public Affairs

✉ [chris.martyn@ipsos.com](mailto:chris.martyn@ipsos.com)

📞 416.324.2010