



Finance Canada

Summer 2017 – Survey and Focus Groups on the Economy

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Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Signed:

A handwritten signature in black ink, appearing to read "Rick Nadeau", is centered on a white rectangular background with a light gray grid pattern.

Rick Nadeau, President

Quorus Consulting Group Inc.

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Executive Summary



Research Purpose and Objectives

The Government of Canada has made important investments to grow the economy as well as commitments to sound fiscal management to support it. A recent example is the Budget 2017, balancing the need to make targeted investment to support economic growth, while preserving Canada's low-debt advantage for current and future generations.

New plans on developing the economy along with an uncertain global economy urge to understand how Canadians perceive the government actions, and the state of the economy.

Therefore, Finance Canada identified a need for primary market research to gain specific insights into Canadians' overall concerns and perceptions about the current state of the Canadian economy, emerging economic issues, their sense of personal economic well-being, and their expectations about the role of the Government of Canada in the economy.

The findings of this research will help the Government of Canada understand the public environment and better communicate its actions to enhance Canada's long-term growth potential.

Summary of Findings – Focus Group Phase

General Preoccupations and Priorities

When asked to identify “what keeps them up at night”, many were preoccupied with keeping up with every day expenses or all the bills at the end of the month and struggling with the climbing cost of living. If they were not immediately concerned with their personal economic direction, participants tended to express a concern with the direction in which the world is headed.

Focus on Personal Economic Situation

When the discussion focused exclusively on their personal economic situation, many felt that their situation had grown slightly more challenging compared to a year ago, especially because of the increase in the cost of living. Otherwise participants seemed to feel they are no better or worse off today compared to a year ago. Looking to the future, most felt that there was nothing that would suggest their personal economic situation would be better or worse a year out from now.

A series of economic issues were explored:

- The ability to save, including concerns about having enough for retirement, was raised by some participants.
- Nearly all participants were aware of the recent rise in interest rates (rates had recently increased by 0.25%) but few expressed any concern and nobody indicated having to change their lifestyle

because of this rate increase.

- Participants were generally ambivalent towards the recent rise in the value of the Canadian dollar. If anything, participants were inclined to feel better about this appreciation.
- Participants were annoyed with the price of gas these days, although they did get some consolation from the fact that prices had been higher in the past.
- While there was agreement around the increasingly unaffordable nature of homes and rents in their region, very few admitted that this trend was having a direct negative impact on them personally.

Direction of the Country

Most participants tended to feel that the country was headed in the right direction.

Participants felt the federal government has been **getting the following right** over the past year:

- direction, tone and role on the international stage in terms of affirming the open, community-building and inclusive nature of Canada, and taking the right tact regarding positions taken by the US;
- focus and general stance on the environment, especially on the international stage; and,
- immigration and human rights, in particular actions taken regarding refugee settlement.

Participants felt the federal government has been **getting the following wrong** over the past year:

- deficits and spending;
- not doing enough for First Nations, including better management of MMIW (although some admit that steps had been taken in the right direction);
- abandoning electoral reform;
- legalizing marijuana; and,
- taking care of who is crossing our border into Canada from the U.S.

Taxation

Many in each group felt that the tax system in Canada needs to change. Spontaneous suggestions tended to be limited to broad measures or feelings of inequity, among which the most common included:

- a general feeling of tax burden;
- a sense that large corporations are not paying enough, or have access to too many avenues for tax diversion;

- frustration related to the ability for high income Canadians to use offshore accounts and other strategies to reduce, if not completely eliminate, their share of taxes;
- the complexity of the tax code and of the process for completing one's tax return;
- the disproportionate burden of taxes on the middle-class and that group's inability to leverage or access opportunities to reduce their taxes compared to higher income Canadians.

Awareness of any recent ideas proposed to reform the tax system in Canada was extremely low.

There was strong agreement that "people in similar circumstances, earning similar incomes, should pay similar amounts of tax."

Participants were presented with a list of seven broad groups from which the following was discovered:

- Participants consistently flagged large corporations and the "top 1%" as the ones who should be paying more in taxes, and small corporations and middle-income earners as the ones already paying their fair share of taxes.
- When thinking about small corporations, participants tended to be reminded of local or family-owned small businesses that are close to the communities in which they are located.
- Participants almost always over-estimated the lower threshold to qualify to be part of the "top 1% of income earners."
- In terms of three avenues the government could consider when reforming the tax system for the top 1% of income earners, there was a strong preference for "doing more to prevent tax evasion" and "closing tax loopholes that are primarily used by the richest Canadians to reduce the taxes they pay" over "raising income tax rates."
- Participants had some difficulty estimating the income bracket that defined a middle-income household. There was some agreement that if the definition is income-based, there could not be a single definition for the entire country.

Two specific corporate tax scenarios were explored with participants.

Scenario 1: Small business owners have access to a tax exemption on the profit from selling their business: Nearly all participants agreed that the small business owner should have access to the tax exemption on the capital gains from selling the business whereas the investment property owner should not. Ultimately, many saw the small business owner as contributing to the economy, paying business taxes, supporting the local community and probably employing people whereas an investment property was more likely to be seen as a "passive" investment that benefits nobody else but the property owner.

The business owner was seen by most as taking on more risk than the investment property owner.

Scenario 2: Small businesses have a lower tax rate than large businesses in Canada – 10.5% and 15% respectively: Nearly all participants felt that small businesses should have a lower tax rate than larger ones. Not only are participants already predisposed to feeling that larger corporations should be paying more taxes, they also recognized that starting a small company is difficult and that a lower tax rate can not only encourage entrepreneurship but also help the company grow in the early years.

Other Tax Measures

Tax on Sugary Drinks: There was some awareness of a tax on sugary drinks and many were in favour of the idea, fully recognizing that there is obesity and that it could help alleviate pressure on the healthcare system over time. Those less in favour were not convinced that a tax would discourage consumption and were more likely to view the measure as a tax grab.

Many also agreed that, in addition to a tax, other measures, such as health education, were needed to dissuade Canadians, especially youth, from consuming sugary drinks. Some also felt that for such a tax to have a meaningful dissuasive effect, it would need to be high enough for consumers to notice.

Cannabis Revenues: Support for the legalization of cannabis was mixed in every city. Irrespective of their position on the issue, participants widely supported the idea of using new tax revenues from the sale of cannabis to fund drug or general addiction support/rehabilitation programs, mental health programs, education of youth in schools focused on the risks related to consuming cannabis, law enforcement, and healthcare in general.

Canada Employment Credit: There was no awareness of the Canada Employment Credit. Participants were presented with the following scenario: *what if higher income earners no longer received the credit but lower income earners would continue to receive it, and some could receive more?* Most participants generally tended to agree that this would make the tax system more fair.

Allocating New Tax Revenues: Participants were asked to rank in order of preference how they would like the government to allocate new revenue raised across five specific categories. Participants prioritized *providing the money to provinces through transfers that fund healthcare and investing in job skills training and retraining.*

Standard of Living

Generally, participants concluded that “life was simpler” 25 years ago - we didn’t have as many bills, that life was more affordable and that most households could still get by with one car and one income earner. Looking to the future, many participants tended to feel the next generation will have it worse than we do today, mostly because of the unaffordable nature of housing, the ongoing inability to keep salaries in line with inflation and the increasing instability in employment.

Workplace of the Future

Many participants recognized that to be successful in the economy of the future, Canadians will need to be increasingly nimble and flexible, they will need to invest in ongoing training and education and be prepared to live multiple careers instead of working for one company their entire life. Participants also recognized that automation and technology is playing a growing role and that a successful career will depend on their ability to adapt and retool in light of this evolution.

Across four specific types of challenges that the workforce may encounter moving forward, participants were most likely to be concerned with having the right skills and the right education for the jobs of tomorrow.

Participants agreed that the Government of Canada has a role to play in helping Canadians adapt and remain competitive in the workplace of tomorrow:

- Making it easier and more affordable for Canadians to train throughout their lifetime, irrespective of life stage.
- Investing in aligning curriculums and post-secondary programs with the needs of the marketplace.

Methodology – Focus Group Phase

The research methodology consisted of ten traditional, in-facility focus groups with Canadian adults at least 18 years old. These sessions were divided across five different locations across the country: Victoria, BC, Edmonton, AB, North York, ON, Laval, QC and Sudbury, ON. Sessions in each city were split between low income and high income households:

- “High income” was defined as anyone with a personal annual income of over \$80,000 or anyone in a household with multiple incomes with an annual household income of over \$100,000.
- “Low/middle” income was defined as anyone with a personal annual income of up to \$80,000 or anyone in a household with multiple incomes with an annual household income of under \$100,000.

For sessions in North York, participants were recruited exclusively from areas like Markham, Vaughn, Richmond Hill and other Toronto suburbs in the same zone. For sessions in Laval, participants were recruited exclusively from areas like Laval and other North Shore suburbs.

The recruitment process also sought a good representation of men and women and a mix of ethnicity and ages. Quorus adapted and translated the recruitment screener and the moderation guide for this study based on designs provided by Finance Canada

Other parameters of the study include:

- Quorus recruited 10 participants to achieve 8-10 participants per focus group;
- Recruited participants were offered an honorarium of \$75.00 at the end of the focus groups;

- At the recruitment stage and at the beginning of each focus group, participants were informed that the research is for the Government of Canada, that the sessions are audio/video taped and that there are observers.
- All focus groups were held in a facility that allowed the client team to observe the sessions, either behind a one-way mirror or via closed-circuit TV in a room adjacent to the meeting room where the focus groups took place.
- A total of 71 individuals participated in these focus groups.

The locations and dates of the sessions are presented in the grid below:

Location	Segment	Language	Number of Participants	Date and Time
Victoria, BC	High Income	English	4	August 15 @ 5:30 pm
Victoria, BC	Low / Middle Income	English	8	August 15 @ 7:30 pm
Edmonton, AB	Low / Middle Income	English	8	August 17 @ 5:30 pm
Edmonton, AB	High Income	English	7	August 17 @ 7:30 pm
North York, ON	Low / Middle Income	English	8	August 18 @ 5:30 pm
North York, ON	High Income	English	6	August 18 @ 7:30 pm
Laval, QC	High Income	French	6	August 22 @ 12:30 pm
Laval, QC	Low / Middle Income	French	9	August 22 @ 2:30 pm
Sudbury, ON	Low / Middle Income	English	7	August 23 @ 5:30 pm
Sudbury, ON	High Income	English	8	August 23 @ 7:30 pm

All focus groups were moderated by Rick Nadeau, one of Quorus' bilingual senior researchers on the Government of Canada Standing Offer.

Qualitative Research Disclaimer

Qualitative research seeks to develop insight and direction rather than quantitatively projectable measures. The purpose is not to generate "statistics" but to hear the full range of opinions on a topic, understand the language participants use, gauge degrees of passion and engagement and to leverage the power of the group to inspire ideas. Participants are encouraged to voice their opinions, irrespective of whether or not that view is shared by others.

Due to the sample size, the special recruitment methods used, and the study objectives themselves, it is clearly understood that the work under discussion is exploratory in nature. The findings are not, nor were they intended to be, projectable to a larger population.

Specifically, it is inappropriate to suggest or to infer that few (or many) real world users would behave in one way simply because few (or many) participants behaved in this way during the sessions. This kind of projection is strictly the prerogative of quantitative research.

Summary of Findings – Survey Phase

Priorities for the Government of Canada

Respondents were asked to openly suggest issues the Government of Canada should focus on most. The top priority suggested by nearly one fifth of Canadians (18%) is the economy and the creation of jobs or reduction of unemployment. Close to one tenth of respondents feel the priority should be health care (9%), the environment (including general environmental issues, climate change and global warming – 9%), or immigration and refugees (7%).

Once survey participants expressed their suggestions for a top priority for the federal government, they were asked if other issues should be addressed. The economy and creation of jobs or reduction of unemployment were mentioned by 10% of respondents, and nearly the same number referred to health care and hospitals (9%), crime and national security (9%), and immigration or refugees (7%).

Economic Wellbeing

Respondents used a scale from 1 (terrible) to 10 (excellent) to assess various aspects of economic wellbeing. Roughly half provided a rating from 7 to 10 when asked to rate the current state of their personal financial situation (51%), and the current state of the Canadian economy (48%). Roughly one third provided a positive rating for the current state of the economy in their province or territory (36%), the current value of the Canadian dollar relative to the U.S. dollar (35%), and the current state of the United States economy (30%). Respondents are more inclined to provide a negative rating when it comes to the price of gasoline for which 18% gave a positive rating compared to 54% who provided a rating of 1 to 4.

Job Security

Respondents were asked how concerned they were that they or someone else in their household may lose their job in the next six months, again, using a scale from 1 to 10. Nearly one quarter of respondents (24%) are very concerned (provided a rating between 7 and 10), 11% are somewhat concerned (ratings 5 or 6), while 58% are not very concerned.

Economic Confidence

Survey participants were asked to rate how different statements made them feel regarding the Canadian economy, using a scale from 1 to 10, where 1 meant it made them feel a lot worse, and 10 meant it made them feel a lot better.

- Over 6 in 10 respondents would feel good (i.e. gave ratings from 7 to 10) if new jobs are created (65%), or if unemployment decreases (63%).
- Over half of respondents would feel better about the economy if poverty were to decrease (58%), if Canadians had less household debt (56%), or if Canadians had more to save for retirement (56%).
- Roughly half would feel better about the economy if the Canadian dollar were to increase in value (54%), if the economy grew faster than Canada's debt (52%), or if the Canadian stock market were to increase in value (49%).
- Less than half of respondents would feel better if the deficit decreases (46%), if household incomes increase at par with inflation (46%), or if there was a decrease in interest rates (40%).

Sentiment or economic confidence is not proportionately reversed when the opposite of all these statements is presented. In other words, for many of the scenarios presented, the upside of a positive economic development is smaller than the downside of a negative economic development. This is the case when it comes to a shift in poverty (74% feel worse if poverty increases but only 58% feel better if it decreases), household debt (70% versus 56%), retirement savings (64% vs. 56%), debt to GDP ratio (66% vs. 52%), the size of the deficit (59% vs. 46%), household incomes keeping par with inflation (66% vs. 52%) and a shift in interest rates (53% vs. 40%).

Economic Expectations

Respondents were then asked how they expect various economies to perform over the next 6 months, including their own personal financial situation. Generally, respondents are optimistic when it comes to the domestic economy and their personal financial situation, but they are more concerned with the U.S. and the global economy.

- Nearly two fifths of Canadians say they expect the Canadian economy to improve (38%) while 18% expect it will worsen over the next 6 months.
- One third of respondents feel their personal financial situation will improve (33%) whereas 9% expect it to worsen.
- A similar proportion (31%) are optimistic about their province's or territory's economy whereas 23% believe it will worsen.
- Roughly one quarter believe the stock market (26%), the U.S. economy (26%) and the global economy (23%) will improve however pessimism is more common when it comes to the U.S. economy (42% believe it will worsen) and the global economy (33% believe it will worsen).

Housing and Interest Rates

Survey participants were presented with a series of statements related to mortgage and interest rates to rate their level of agreement with each of them. Half of participants (51%) agree it would be easy for them to get a mortgage today, while nearly one third disagree with this statement (32%). Additionally, half of participants (49%) disagree that their personal financial situation will benefit from increased interest rates, while 21% agree with this, and 27% feel neutral about it.

Respondents with a mortgage were divided into three samples, each presented with a different interest rate statement. More than three in five mortgage owners (63%) agree it would be easy to make mortgage payments if interest rates were to rise by 0.5%. Similarly, 62% agree with the scenario if interest rates were to rise 1%. The 2% interest rate increase breaks this pattern, as only 49% agree this increase would make mortgage payments easy to cover, while 32% outright disagree.

The Tax System

Respondents were asked to openly say what they had heard about the Government of Canada's proposed measures to make the tax system fairer. Over half of respondents indicated they have not heard anything in this regard (54%), another 5% did not know or refused to answer the question and 6% said they had heard something but did not know enough to provide an explanation. Among those who did provide a response, no single issue or theme rises above the rest in a noticeable way.

Priorities for the Government of Canada

When presented with a list of various initiatives, creating jobs and increasing economic growth were the two that attracted the most support as a possible priority for the Government of Canada. When respondents were asked specifically how much of a priority these two areas should be for the Government of Canada, 87% provided a rating of 7 to 10 (on a 1 to 10 priority scale) when it comes to "creating jobs" and 86% provided this sort of rating for "increasing economic growth in Canada."

Other priorities that were rated highly by at least three quarters of respondents include making the richest Canadians pay their fair share in taxes (76%), investing in infrastructure like roads and public transit (75%), strengthening the middle class (75%), making the tax code fairer (75%), and making Canada more competitive internationally (75%). Nearly 3 in 4 rated highly closing tax loopholes used by the richest Canadians (73%), or growing the middle class (72%).

Suggestions that were supported by a minority of respondents included closing tax loopholes used by small businesses (35%), lowering taxes on large businesses (19%), raising taxes on small businesses (10%), and raising taxes on individual Canadians (10%).

Methodology – Survey Phase

All research work was conducted in accordance with the professional standards established by the Marketing Research and Intelligence Association (MRIA), and the Government of Canada Public Opinion Research Standards.

The survey consisted of a national telephone survey with Canadians, 18 years of age and older. The sample consisted of traditional wireline telephone numbers and a sub-quota of cell-phone only households.

Quorus designed the survey instrument in English and collaborated with Finance Canada to finalize the survey instrument. Quorus translated the client-approved English version of the survey. The approved final questionnaires were programmed for computer-based telephone data collection, and the survey was registered with the Marketing Research and Intelligence Association's (MRIA) National Survey Registration System.

Respondents had the choice to complete the interview in English or French and were informed of their rights under the *Privacy and Access to Information Acts*.

The phone interview took on average 12 minutes to complete, and consisted of mostly closed-ended questions. Data collection occurred between September 6th and October 1st, 2017, including a pretest of the questionnaire.

A total of 2,000 interviews were completed using a stratified random sampling approach. The response rate for the overall sample was 8%.

The research findings can be extrapolated to the broader audience considering the margin of error associated with this sample size, +/- 2.2%, 19 times out of 20. The margins of error vary based on a variety of factors. For instance, results for sub-groups with smaller sample sizes will have a higher margin of error.

As well, the margin of error is typically highest for questions where 50% of respondents answered one way and 50% answered another way. The margin of error typically decreases as the percent for a particular response approaches 0% or 100%.

PROVINCE	SAMPLE DISTRIBUTION	MARGIN OF ERROR
Newfoundland and Labrador	75	+/- 11.3%
Prince Edward Island	75	+/- 11.3%
New Brunswick	100	+/- 9.8%
Nova Scotia	100	+/- 9.8%
Quebec	400	+/- 4.9%
Ontario	550	+/- 4.2%
Manitoba/Nunavut	100	+/- 9.8%
Saskatchewan	100	+/- 9.8%
Alberta/NWT	200	+/- 6.9%
British Columbia/Yukon	300	+/- 5.7%
TOTAL	2,000	+/- 2.2%

Data was weighted by region, gender, age and urban/rural split to ensure that the final distributions within the final sample mirror those of the Canadian population according to the latest Census data.

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Sommaire exécutif



Objectifs de la recherche

Le gouvernement du Canada a réalisé des investissements importants pour stimuler l'économie et s'est engagé à pratiquer une saine gestion des finances afin de soutenir ces investissements. Un récent exemple est le Budget 2017 qui vise à préserver l'équilibre entre le besoin d'investir de manière ciblée pour assurer la croissance économique et celui de préserver un faible niveau d'endettement du Canada pour les générations actuelles et futures.

Les nouveaux plans de développement économique et le climat d'incertitude économique à l'échelle planétaire nous exhortent à comprendre de quelle manière les Canadiens perçoivent les mesures prises par le gouvernement et la situation économique.

Par conséquent, le ministère des Finances a jugé nécessaire de mener une étude de marché primaire pour connaître les préoccupations et les perceptions des Canadiens envers l'état actuel de l'économie canadienne, les enjeux économiques émergents, leur sentiment de bien-être financier personnel et leurs attentes quant au rôle du gouvernement du Canada sur le plan de l'économie.

Les résultats de cette recherche permettront au gouvernement du Canada de mieux comprendre l'environnement public et de mieux communiquer ses plans d'action qui ont pour but d'améliorer le potentiel de croissance à long terme du Canada.

Sommaire des résultats – Groupes de discussion

Préoccupations générales et priorités

À la question « Qu'est-ce qui vous empêche de dormir la nuit », de nombreux participants ont exprimé leurs inquiétudes de ne pouvoir payer leurs dépenses courantes et toutes leurs factures à la fin du mois, et de la difficulté à joindre les deux bouts en raison du coût de la vie qui ne cesse d'augmenter. Même s'ils n'étaient pas immédiatement préoccupés par leur orientation financière personnelle, ils se sont dits inquiets de la direction prise par l'économie mondiale.

Situation financière personnelle

Durant la discussion sur la situation financière personnelle, de nombreux participants ont affirmé que leur situation s'était légèrement détériorée comparativement à il y a un an, principalement en raison de l'augmentation du coût de la vie. Les autres semblaient dire que leur situation ne s'était ni améliorée ni détériorée par rapport à il y a un an. La majorité des participants étaient d'avis que rien ne laissait présager que leur situation sera meilleure ou pire dans un an.

Plusieurs enjeux économiques ont été abordés :

- La capacité à épargner et la crainte de ne pas avoir suffisamment d'argent à la retraite ont été

mentionnés par quelques participants.

- Presque tous avaient entendu parler de la récente hausse des taux d'intérêt (hausse de 0,25 %), mais peu d'entre eux semblaient inquiets. Personne n'a modifié son style de vie à la suite de cette hausse des taux.
- Dans l'ensemble, les opinions concernant la récente hausse du dollar canadien étaient mitigées, mais la plupart des participants ont exprimé leur soulagement.
- Les participants étaient contrariés par le prix de l'essence ces jours-ci. Ils ont toutefois tiré une certaine consolation à l'idée que les prix ont déjà été plus élevés dans le passé.
- Même si la majorité s'est entendue pour dire que la hausse des prix des logements rend les maisons et les loyers sont de moins en moins abordables, très peu ont affirmé que cette tendance avait un impact défavorable sur leur situation personnelle.

Direction du pays

La plupart des participants avaient le sentiment que le pays est sur la bonne voie.

Les participants se sont entendus pour dire que le gouvernement fédéral a **bien fait ce qui suit** au cours de la dernière année :

- La direction, le ton du discours et le rôle du Canada sur la scène internationale lorsqu'il s'agit d'affirmer le caractère ouvert, inclusif et axé sur le développement communautaire de notre pays, et son attitude à l'égard des positions du gouvernement américain;
- L'accent et la ligne générale sur l'environnement, en particulier sur la scène internationale;
- L'immigration et les droits de la personne, notamment les mesures prises pour l'établissement des réfugiés.

Les participants se sont entendus pour dire que le gouvernement fédéral a **mal fait ce qui suit** au cours de la dernière année :

- Les déficits et les dépenses;
- Son manque d'effort vis-à-vis les Premières nations et sa mauvaise gestion dans le dossier des femmes et filles autochtones disparues et assassinées (FFADA), bien que certains admettent que le gouvernement a fait des pas importants dans la bonne direction;
- L'abandon de la réforme électorale;
- La légalisation de la marijuana;
- La prise en charge des personnes qui entrent au Canada à la frontière avec les États-Unis.

Imposition

Dans chaque groupe, ils étaient nombreux à réclamer des changements au système fiscal canadien. Les suggestions spontanées se sont limitées à quelques vastes mesures ou aux sentiments d'injustice, dont ceux-ci :

- Un sentiment généralisé de fardeau fiscal;
- L'impression que les grandes entreprises ne paient pas suffisamment d'impôts ou qu'elles ont accès à d'innombrables échappatoires fiscales;
- La frustration venant du fait que des Canadiens à revenu élevé utilisent des comptes à l'étranger et d'autres stratégies pour réduire, voire même éliminer complètement leur juste part des impôts;
- La complexité du code des impôts et du processus de production d'une déclaration de revenu;
- Le fardeau fiscal disproportionné qui repose sur la classe moyenne et l'incapacité de celle-ci à profiter ou à saisir des occasions de réduire ses impôts, comparativement aux Canadiens à revenu élevé.

Très peu avaient entendu parler des récentes mesures proposées pour la réforme du régime fiscal canadien.

La majorité des participants se sont entendus pour dire que « des personnes dans des circonstances semblables et ayant des revenus semblables devraient payer le même montant d'impôts ».

Les participants ont reçu une liste sur laquelle figuraient sept groupes. Les constatations furent les suivantes :

- Dans tous les groupes, les participants ont identifié les grandes entreprises et le « 1 % de Canadiens qui touchent les revenus les plus élevés » comme étant ceux qui devraient payer plus d'impôts, et les petites entreprises et les Canadiens à moyen revenu comme payant déjà leur juste part.
- De nombreux participants ont associé les petites entreprises aux petits commerces à caractère local et familial qui sont près des résidents du quartier.
- Presque tous les participants ont surestimé le seuil le plus bas d'admissibilité à la catégorie du « 1 % de Canadiens qui touchent les revenus les plus élevés ».
- Parmi les trois mesures que le gouvernement devrait envisager pour la réforme du système fiscal pour la tranche du « 1 % de Canadiens qui touchent les revenus les plus élevés », la majorité a choisi ceux-ci : « en faire davantage pour prévenir l'évasion fiscale » et « éliminer les échappatoires fiscales qui sont utilisées par les Canadiens les mieux nantis pour réduire leur montant d'impôt à payer ».

- Les participants ont eu de la difficulté à estimer la tranche de revenu qui définit le ménage à revenu moyen. Ils se sont entendus pour dire que si la définition est basée sur le revenu, il ne pouvait y avoir une seule définition pour tout le pays.

Deux mises en situation ont été présentées aux participants.

Mise en situation 1 : Les propriétaires de petites entreprises ont droit à une exemption fiscale sur les profits de la vente de leur entreprise : Presque tous les participants étaient d'accord pour dire que les propriétaires de petites entreprises devraient avoir droit à une exemption d'impôts sur les gains en capital découlant de la vente de leur entreprise, alors que les propriétaires de biens de placement ne devraient pas. Bon nombre d'entre eux étaient d'avis que les propriétaires de petites entreprises contribuent à notre économie en payant des taxes professionnelles, en soutenant la collectivité locale et en créant possiblement des emplois, alors que les biens de placement sont souvent considérés comme un placement « passif » qui ne profite à personne d'autre que son propriétaire.

Le propriétaire d'entreprise est considéré par la majorité comme prenant davantage de risques que le propriétaire d'un bien de placement.

Mise en situation 2 : Au Canada, les petites entreprises ont un taux d'imposition inférieur à celui des grandes entreprises, soit 10,5 % et 15 % respectivement : Presque tous les participants étaient d'avis que les petites entreprises devraient avoir un taux d'imposition plus bas que les grandes entreprises. Non seulement les participants étaient déjà prédisposés à dire que les grandes entreprises devraient payer plus d'impôts, mais ils ont également reconnu qu'il est difficile de démarrer une petite entreprise et que le faible taux d'imposition encourage non seulement l'entrepreneuriat, mais contribue également à la croissance de l'entreprise les premières années.

Autres mesures fiscales

Taxe sur les boissons sucrées : Un certain nombre de participants avaient entendu parler de la taxe sur les boissons sucrées et ont signifié leur accord, reconnaissant que l'obésité est un problème et que cette taxe pourrait réduire la pression exercée sur le système de santé au fil des ans. Ceux qui étaient moins favorables à l'idée n'étaient pas convaincus que la taxe découragerait la consommation et ont jugé qu'il s'agissait d'une plutôt d'une taxe déguisée.

Plusieurs étaient d'avis qu'en plus de la taxe, d'autres mesures, comme l'éducation en matière de santé, étaient nécessaires pour dissuader les Canadiens, en particulier les jeunes, de consommer des boissons sucrées. Selon certains, pour avoir un effet dissuasif, la taxe devait être suffisamment élevée pour que les consommateurs la remarquent.

Revenus générés par le cannabis : Dans chaque ville, les opinions sur la légalisation du cannabis étaient partagées. Peu importe leur avis sur le sujet, les participants étaient en grande partie d'accord avec l'idée d'utiliser les nouvelles recettes fiscales provenant de la vente du cannabis pour financer les programmes d'aide aux toxicomanes et de réadaptation, les programmes de santé mentale, l'éducation axée sur les

risques liés à la consommation du cannabis pour les jeunes dans les écoles, l'application des lois et les soins de santé en général.

Crédit canadien pour emploi : Personne n'avait entendu parler du Crédit canadien pour emploi. La mise en situation suivante a été présentée aux participants : *Si on modifiait ce crédit de sorte que les salariés à revenu élevé ne puissent plus le recevoir, mais que les salariés à faible revenu continuent de le recevoir et que le crédit soit plus élevé ?* La majorité s'est entendue pour dire que cette mesure rendrait le régime fiscal serait plus équitable.

Allocation des revenus générés par les nouvelles mesures fiscales : Les participants devaient classer en ordre de préférence les différentes façons dont le gouvernement pourrait répartir les nouveaux revenus parmi cinq catégories. Ceux-ci ont choisi « *allouer ces revenus aux soins de santé en effectuant des transferts aux provinces* » et « *Investir dans la formation ou le recyclage professionnels* ».

Niveau de vie

En règle générale, les participants ont conclu que la vie était plus simple il y a 25 ans, il n'y avait pas autant de factures à payer, le coût de la vie était plus abordable et la majorité des ménages s'en tiraient bien avec un seul véhicule et un seul salaire. De nombreux participants avaient le sentiment que la situation de la prochaine génération sera pire que la nôtre aujourd'hui, principalement en raison des logements qui seront de plus en plus inabordables, de l'incapacité à maintenir les salaires au même niveau que l'inflation et de l'instabilité accrue de l'emploi.

Le monde du travail de l'avenir

De nombreux participants ont reconnu que pour réussir dans l'économie du futur, les Canadiens devront faire preuve de plus en plus d'agilité et de souplesse. Ils devront également investir dans la formation continue et se préparer à avoir des carrières multiples plutôt que de travailler toute leur vie pour le même employeur. Ils ont également admis que l'automatisation et la technologie jouent un rôle de plus en plus important et que le succès de toute carrière dépend de la capacité à s'adapter et à se doter de nouveaux outils pour suivre cette évolution.

Parmi les quatre types de défis qu'un travailleur doit affronter, ce sont les compétences et la formation nécessaires pour les emplois du futur qui ont surtout retenu l'attention.

Les participants se sont entendus pour dire que le gouvernement du Canada a un rôle à jouer pour aider les Canadiens à s'adapter et à demeurer compétitifs sur le marché du travail de demain :

- En faisant le nécessaire pour que la formation soit plus accessible et plus abordable pour les Canadiens tout au long de leur vie, peu importe l'étape de vie.
- En investissant pour s'assurer que les curriculums et les programmes postsecondaires répondent aux besoins du monde de l'emploi.

Méthodologie – Groupes de discussion

La méthodologie de recherche consistait en dix groupes de discussion traditionnels réunis dans un local. Ces groupes étaient composés de Canadiens adultes de 18 ans et plus et les séances ont eu lieu dans cinq villes : Victoria (C.-B.), Edmonton (AB), North York (ON), Laval (QC) et Sudbury (ON). À chaque endroit, les groupes étaient composés de ménages à faible/moyen revenu et de ménages à revenu élevé :

- Un « revenu élevé » est défini comme quiconque ayant un revenu annuel personnel supérieur à 80 000 \$ ou toute personne dans un ménage avec des revenus multiples et un revenu annuel du ménage supérieur à 100 000 \$.
- Un « faible/moyen revenu » est défini comme quiconque ayant un revenu annuel personnel pouvant atteindre 80 000 \$ ou toute personne dans un ménage avec des revenus multiples et un revenu annuel du ménage inférieur à 100 000 \$.

Pour les séances à North York, les participants ont été recrutés exclusivement dans les secteurs de Markham, Vaughn, Richmond Hill et autres villes en banlieue de Toronto. Pour les séances à Laval, les participants étaient des résidents de Laval et de la Rive-Nord.

Le processus de recrutement visait à obtenir une bonne représentation hommes-femmes et un mélange d'âges et d'ethnicités. Pour cette étude, Quorus a adapté et traduit le questionnaire de recrutement et le guide du modérateur en tenant compte des spécifications fournies par le ministère des Finances.

L'étude comportait plusieurs autres paramètres :

- Quorus a recruté 10 participants pour avoir de 8 à 10 participants dans chaque groupe.
- Les participants ont reçu une prime de 75 \$ au terme de chaque séance.
- À l'étape du recrutement et au début de chaque séance, les participants ont été informés que la recherche était menée pour le compte du gouvernement du Canada, que les séances seraient enregistrées sur bande audiovisuelle et que des observateurs seraient présents.
- Toutes les séances ont eu lieu dans un local permettant à l'équipe du client d'observer les discussions, soit derrière un miroir d'observation ou sur un écran de télévision en circuit fermé dans un local adjacent à la salle de réunion où les groupes étaient réunis.
- Au total, 71 personnes ont participé aux discussions de groupe.

Les renseignements relatifs aux séances sont présentés ci-dessous :

Ville	Segment	Langue	Nombre de participants	Date et heure
Victoria, C.-B.	Revenu élevé	Anglais	4	15 août à 17 h 30
Victoria, C.-B.	Faible/moyen revenu	Anglais	8	15 août à 19 h 30
Edmonton, AB	Faible/moyen revenu	Anglais	8	17 août à 17 h 30
Edmonton, AB	Revenu élevé	Anglais	7	17 août à 19 h 30
North York, ON	Faible/moyen revenu	Anglais	8	18 août à 17 h 30
North York, ON	Revenu élevé	Anglais	6	18 août à 19 h 30
Laval, QC	Revenu élevé	Français	6	22 août à 12 h 30
Laval, QC	Faible/moyen revenu	Français	9	22 août à 14 h 30
Sudbury, ON	Faible/moyen revenu	Anglais	7	23 août à 17 h 30
Sudbury, ON	Revenu élevé	Anglais	8	23 août à 19 h 30

Toutes les séances étaient animées par Rick Nadeau, chercheur principal bilingue de Quorus, d'après la convention d'offre à commandes du gouvernement du Canada.

Mise en garde concernant la recherche qualitative

La recherche qualitative a pour but d'acquérir une compréhension et d'établir une orientation, plutôt que des mesures quantitativement extrapolables. Son objectif n'est pas de générer des « statistiques », mais de recueillir un éventail complet d'opinions sur un sujet donné, de comprendre le langage utilisé par les participants, de mesurer le degré de passion et d'engagement, et de miser sur le pouvoir du groupe pour inspirer des idées. Les participants sont encouragés à exprimer leurs opinions, peu importe qu'elles soient partagées ou non par le reste du groupe.

Étant donné la taille de l'échantillon, les méthodes de recrutement particulières utilisées et les objectifs de la recherche, il est clairement entendu que les travaux sous discussion sont de nature exploratoire. Les résultats ne doivent pas être extrapolés à une population plus vaste.

Plus précisément, il est inapproprié de suggérer ou de laisser entendre que quelques (ou plusieurs) vrais utilisateurs agiraient d'une certaine façon simplement parce que quelques (ou plusieurs) participants se sont comportés ainsi durant les séances. Ce type de projection relève exclusivement de la recherche quantitative.

Sommaire des résultats – Sondage

Priorités du gouvernement du Canada

Les répondants étaient invités à suggérer des enjeux sur lesquels le gouvernement du Canada devrait axer ses efforts. Environ un participant sur cinq (18 %) a mentionné l'économie et la création d'emplois ou la réduction du taux de chômage. Selon un participant sur dix environ, il faudrait prioriser les soins de santé (9 %), l'environnement (et les problèmes environnementaux en général), le changement climatique et le réchauffement planétaire (9 %), ainsi que l'immigration et les réfugiés (7 %).

Ayant pris connaissance de leurs suggestions de priorité absolue pour le gouvernement fédéral, nous avons demandé aux participants s'il y avait d'autres enjeux. Dix pour cent (10 %) des répondants ont mentionné l'économie et la création d'emplois ou la réduction du taux de chômage. Un pourcentage similaire (9 %) a mentionné les soins de santé et les hôpitaux, la criminalité et la sécurité nationale (9 %), l'immigration et les réfugiés (7 %).

Bien-être économique

Les participants ont utilisé une échelle de 1 (désastreux) à 10 (excellent) pour évaluer divers aspects du bien-être économique. Près de la moitié a donné une note de 7 à 10 pour ce qui est de la situation financière personnelle (51 %) et l'état actuel de l'économie canadienne (48 %). Près du tiers a donné une note positive à l'état de l'économie dans leur province ou territoire (36 %), à la valeur du dollar canadien par rapport au dollar américain (35 %) et à l'état actuel de l'économie américaine (30 %). Ils ont été plus nombreux à donner un score négatif au prix de l'essence (18 % de notes positives et 54 % de 1 à 4).

Sécurité d'emploi

À la question à savoir s'ils étaient préoccupés à l'idée qu'eux-mêmes ou un membre de leur ménage pourraient perdre leur emploi au cours des six prochains mois, et en utilisant une échelle de 1 à 10, près du quart des participants (24 %) se sont dits très préoccupés (note de 7 à 10), 11 % ont répondu qu'ils étaient assez préoccupés (note de 5 ou 6), et 58 % n'étaient pas préoccupés du tout.

Confiance envers l'économie

Nous avons demandé aux participants d'évaluer les sentiments que leur inspiraient certains énoncés au sujet de l'économie canadienne, sur une échelle de 1 à 10 où 1 signifie que l'énoncé leur donne un sentiment bien plus négatif de l'économie canadienne et 10, qu'il leur donne un bien meilleur sentiment.

- Plus de 6 participants sur 10 auraient un bon sentiment (note de 7 à 10) si de nouveaux emplois étaient créés (65 %) ou si le taux de chômage diminuait (63 %).

- Plus de la moitié des participants auraient un meilleur sentiment envers l'économie si la pauvreté diminuait (58 %), si la dette des ménages canadiens était moins élevée (56 %) ou si les Canadiens avaient plus d'argent à épargner pour la retraite (56 %).
- Près de la moitié des participants auraient un meilleur sentiment si la valeur du dollar canadien augmentait (54 %), si la croissance économique était plus rapide que celle de la dette (52 %) ou si les indices boursiers canadiens augmentaient (49 %).
- Moins de la moitié des participants auraient un meilleur sentiment si le déficit diminuait (46 %), si les revenus des ménages augmentaient au même rythme que l'inflation (46 %), ou si les taux d'intérêt étaient réduits (40 %).

La confiance envers l'économie n'est pas proportionnellement inversée lorsque des énoncés opposés sont présentés. Autrement dit, pour bon nombre des mises en situation présentées, les effets positifs d'un développement économique favorable sont inférieurs aux effets négatifs d'un développement économique défavorable. C'est le cas de la fluctuation du taux de pauvreté (74 % auraient un sentiment plus négatif si le taux de pauvreté augmentait, mais seulement 58 % auraient un meilleur sentiment si ce taux diminuait), de la dette des ménages (70 % versus 56 %), l'épargne pour la retraite (64 % versus 56 %), le ratio dette-PIB (66 % versus 52 %), le montant du déficit (59 % versus 46 %), les revenus des ménages qui suivent le rythme de l'inflation (66 % versus 52 %) et la fluctuation des taux d'intérêt (53 % versus 40 %).

Attentes économiques

Nous avons demandé aux participants comment ils entrevoyaient la performance de diverses économies au cours des six prochains mois, y compris leur situation financière personnelle. En règle générale, ils étaient optimistes face à l'économie nationale et leur situation financière personnelle, mais préoccupés par l'économie américaine et mondiale.

- Près d'un participant sur cinq s'attend à ce que l'économie canadienne s'améliore (38 %) et 18 % croient qu'elle ira en se détériorant au cours des six prochains mois.
- Un participant sur trois prévoit une amélioration de sa situation financière personnelle (33 %) et 9 % s'attendent à ce qu'elle se détériore.
- Environ le même pourcentage de participants (31 %) s'est dit optimiste à l'égard de l'économie de la province ou du territoire, alors que 23 % croient qu'elle se détériorera.
- Près d'un participant sur quatre est d'avis que les indices boursiers (26 %), l'économie américaine (26 %) et l'économie mondiale (23 %) iront en s'améliorant. Toutefois, le pessimisme est plus marqué à l'égard de l'économie américaine (42 % croient qu'elle se détériorera) et de l'économie mondiale (33 %).

Logement et taux d'intérêt

Les participants ont reçu une série d'énoncés au sujet des hypothèques et des taux d'intérêt et devaient indiquer dans quelle mesure ils étaient d'accord ou non avec chaque énoncé. La moitié des participants (51 %) étaient d'accord pour dire qu'ils pourraient facilement obtenir un prêt hypothécaire aujourd'hui, alors que près du tiers étaient en désaccord avec cet énoncé (32 %). De plus, la moitié des participants (49 %) n'étaient pas d'accord pour dire que la hausse des taux d'intérêt aura un effet favorable sur leur situation financière personnelle ; 21 % étaient d'accord avec cet énoncé et 27 % n'étaient ni d'accord ni en désaccord.

Les participants avec une hypothèque ont été divisés en trois groupes et un énoncé différent sur les taux d'intérêt leur a été présenté. Plus de trois propriétaires sur cinq possédant une hypothèque (63 %) étaient d'accord pour dire qu'ils n'auraient aucune difficulté à rembourser leur prêt hypothécaire si les taux d'intérêt augmentaient de 0,5 %. Dans le même ordre d'idées, 62 % étaient d'accord avec l'énoncé si les taux d'intérêt augmentaient de 1 %. D'autre part, les participants qui se sont fait proposer une augmentation des taux de 2 % n'étaient pas aussi nombreux à signifier leur accord et seulement 49 % d'entre eux étaient d'avis qu'ils n'auraient aucune difficulté à rembourser leur prêt hypothécaire dans ces conditions, et 32 % étaient carrément en désaccord.

Régime fiscal

Les participants étaient encouragés à parler ouvertement de ce qu'ils avaient entendu au sujet des mesures proposées par le gouvernement du Canada pour rendre le régime fiscal plus équitable. Plus de la moitié d'entre eux ont affirmé ne rien avoir entendu à ce sujet (54 %), 5 % ne savaient rien ou ont refusé de répondre et 6 % ont affirmé avoir entendu quelque chose, mais n'en savaient pas assez sur ces mesures pour les expliquer. Parmi ceux qui ont répondu, aucun thème ou enjeu particulier ne s'est particulièrement démarqué.

Priorités du gouvernement du Canada

Parmi les diverses initiatives qui leur ont été présentées, « créer des emplois » et « favoriser la croissance économique » ont obtenu la meilleure cote comme priorités éventuelles du gouvernement du Canada. Lorsque nous leur avons demandé quelle était la priorité que le gouvernement du Canada devrait accorder à chacune d'elles, 87 % des participants ont donné une note de 7 à 10 (sur une échelle de 1 à 10) à « créer des emplois » et 86 % à « favoriser la croissance économique au Canada ».

Parmi les autres priorités ayant obtenu une note élevée de la part des quarts des participants : exiger des Canadiens à revenu élevé qu'ils paient leur juste part d'impôts (76 %), investir dans l'infrastructure comme les routes et les transports publics (75 %), renforcer la classe moyenne (75 %), simplifier le code des

impôts (75 %) et rendre le Canada plus concurrentiel à l'échelle internationale (75 %). Près de trois participants sur quatre ont donné une note élevée à « supprimer les échappatoires fiscales utilisées par les Canadiens les mieux nantis » (73 %) et « favoriser la croissance de la classe moyenne » (72 %).

Une minorité de participants a suggéré de supprimer les échappatoires fiscales utilisées par les petites entreprises (35 %), diminuer les impôts des grandes entreprises (19 %), augmenter les impôts des petites entreprises (10 %) et augmenter les impôts des Canadiens (10 %).

Méthodologie – Sondage

Tous les travaux de recherche ont été menés conformément aux normes professionnelles établies par l'Association de la recherche et de l'intelligence marketing (ARIM) et aux normes en matière de recherche sur l'opinion publique du gouvernement du Canada.

Le sondage téléphonique a été réalisé à l'échelle nationale avec des Canadiens âgés de 18 ans et plus. L'échantillon était composé de numéros de téléphone sur fil traditionnel, avec un sous-segment de ménages avec téléphones sans fil seulement.

Quorus a conçu l'instrument de sondage en anglais et a collaboré avec le ministère des Finances pour peaufiner la version finale. Elle a par la suite traduit le document tel qu'approuvé par le client. Les versions finales et approuvées des questionnaires ont été programmées pour la collecte téléphonique des données assistée par ordinateur et le sondage a été enregistré dans le système national d'enregistrement des sondages de l'Association de la recherche et de l'intelligence marketing (ARIM).

Les participants avaient le choix de faire l'entrevue en anglais ou en français. Ils ont été informés des droits que leur confèrent la *Loi sur la protection des renseignements personnels* et la *Loi sur l'accès à l'information*.

D'une durée moyenne de 12 minutes, l'entrevue téléphonique comportait presque exclusivement des questions fermées. La collecte des données a eu lieu du 6 septembre au 1^{er} octobre 2017 et comportait un test préliminaire du questionnaire.

Au total, 2 000 entrevues ont été réalisées selon la technique de l'échantillonnage aléatoire stratifié. Le taux de réponse pour l'échantillon global était de 8 %.

Les résultats de la recherche peuvent être extrapolés à un plus vaste auditoire puisque la marge d'erreur pour un échantillon de cette taille est de +/- 2,2 %, 19 fois sur 20. Les marges d'erreur varient selon plusieurs facteurs. Par exemple, la marge d'erreur sera plus grande pour les sous-groupes avec échantillons de petite taille.

De la même manière, la marge d'erreur est généralement plus élevée pour les questions auxquelles 50 % des participants ont donné une réponse X et l'autre 50 %, une réponse Y. Normalement, la marge d'erreur diminue au fur et à mesure que le pourcentage pour une réponse donnée approche 0 % ou 100 %.

PROVINCE	DISTRIBUTION DE L'ÉCHANTILLON	MARGE D'ERREUR
Terre-Neuve-et-Labrador	75	+/- 11,3 %
Île-du-Prince-Édouard	75	+/- 11,3 %
Nouveau-Brunswick	100	+/- 9,8 %
Nouvelle-Écosse	100	+/- 9,8 %
Québec	400	+/- 4,9 %
Ontario	550	+/- 4,2 %
Manitoba/Nunavut	100	+/- 9,8 %
Saskatchewan	100	+/- 9,8 %
Alberta/T.-N.-O.	200	+/- 6,9 %
Colombie-Britannique/Yukon	300	+/- 5,7 %
TOTAL	2,000	+/- 2,2 %

Les données ont été pondérées par région, sexe, âge et milieu urbain ou rural pour obtenir un échantillon fidèle à la population canadienne d'après les données du dernier recensement.

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Detailed Results



Focus Group Research Findings

General Preoccupations and Priorities

When asked to identify “what keeps them up at night”, responses from participants tended to fall into one of two broad categories:

- Many were preoccupied with their **personal economic situation**. This often took the form of not being able to keep up with every day expenses or all the bills at the end of the month and struggling with the climbing cost of living. These concerns were more often heard in the low and middle-income sessions. The next most commonly heard concern tended to be around job stability and security, again more common in low and middle-income groups.
- If they were not immediately concerned with their personal economic direction, participants tended to express a concern with the **direction in which the world is headed**. The concern almost always focused on what was happening in the United States and the decisions being taken by the current U.S. administration. A few also noted that the tension between the United States and North Korea was worrisome. A few were also concerned with racism and the politics of division that are making headlines around world.

Focus on Personal Economic Situation

When the discussion focused exclusively on their personal economic situation, many felt that their situation had grown slightly more challenging compared to a year ago, especially because of the increase in the cost of living. There were isolated examples where a specific development had led to an improvement in some participants’ personal economic situation (e.g. a renewed employment contract, having one of their children graduate from university, etc.) and a few others that had led to a more challenging situation (e.g. co-signing on a mortgage with one of their children). Otherwise participants seemed to feel they are no better or worse off today compared to a year ago.

Looking to the future, most felt that there was nothing that would suggest their personal economic situation would be better or worse a year out from now. The few who felt it would be *worse* were especially concerned with the cost of living and, especially among lower and middle-income earners, with job stability.

When specifically prompted to consider how the next generation of Canadians will fare, a range of opinions were voiced, although participants seemed generally pessimistic. This sentiment was largely driven by a concern for job availability and stability, the cost of living and the cost of housing. This is further discussed later in this report in the section dedicated to opinions on standard of living.

A series of economic factors were explored to assess the level of concern participants might have with each one.

- The ability to save, including concerns about having enough for retirement, was raised by some participants. The ability to save was especially a challenge in the low and middle-income sessions where participants emphasized that it was hard enough living paycheque to paycheque, and that the notion of putting away savings was very difficult if not entirely impossible.
- Participants were for the most part well aware of the recent rise in interest rates (rates had recently increased by 0.25%). No participant expressed any sign of concern with this recent increase in interest rates and nobody indicated having to change their lifestyle because of this rate increase. A 1% increase in interest rates over the short term was still not likely to have an immediate impact on most participants although for the few who would feel it, the impact would be serious. If an impact were to be felt, it would be when they renegotiate their mortgage. Many participants explained that they were currently locked into a fixed rate mortgage or had no mortgage at all and that a rate increase would not have an immediate impact on them. A few mistakenly assumed that a rate increase would also lead to an increase in the interest rates on their credit cards and that this would have an impact on their ability to pay their credit card bills.
- Participants were generally ambivalent towards the recent rise in the value of the Canadian dollar. If anything, participants were inclined to feel better about this appreciation because it suggested an improvement in the state of the Canadian economy. A few also felt better about the appreciation because they were going to travel to or shop in the U.S. in the near future.
- Participants were annoyed with the price of gas these days, although they did get some consolation from the fact that prices had been higher in the past. Very few had adjusted their behaviours in light of the price of gas and many saw it as something they just had to pay. Some also could not understand why the price of gas had remained as high as it did when the price for a barrel of oil had dropped and had remained low.
- While there was agreement around the increasingly unaffordable nature of homes and rents in their region, very few admitted that this trend was having a direct negative impact on them personally. The recognition of the appreciation in the value of homes and rents was noticed in all cities, and by both low/middle income and higher incomes participants. Participants themselves were rarely “in the market” so they did not see this appreciation as affecting them directly; however, older participants were seeing an impact indirectly through the challenges their children were having in finding a home they could afford, as well as saving enough money to afford a down payment. A few were concerned that their municipal taxes were increasing because of the increased valuation of their homes, and that this was more likely to be having a direct impact on their personal financial situation.

Direction of the Country

When specifically asked about the general direction of the country, most tended to feel that the country was headed in the right direction.

In terms of what participants felt the federal government has been **getting right** over the past year, the more commonly shared views included the following:

- direction, tone and role on the international stage (i.e. “international public relations”, foreign policy, diplomacy, etc.) in terms of affirming the open, community-building and inclusive nature of Canada, and taking the right tact (and the “high road”) regarding positions taken by the US;
- focus and general stance on the environment, especially on the international stage; and,
- immigration and human rights, in particular actions taken regarding refugee settlement.

Other areas noted by participants included: Canada 150 celebrations, health care, removing troops from Afghanistan, investing in infrastructure, legalizing marijuana, improving financial support for families (i.e. the Canada Child Tax Benefit), focus on international trade, and improved treatment of veterans and the troops.

In terms of what participants felt the federal government has been **getting wrong** over the past year, the more commonly shared views included the following:

- concerns with deficits and spending;
- doing more for First Nations, including better management of MMIW (although some admit that steps had been taken in the right direction);
- abandoning electoral reform;
- legalizing marijuana; and,
- taking care of who is crossing our border into Canada from the U.S. More specifically, there were concerns with how the government is managing and controlling the recent surge in cross-border asylum seekers.

Other areas noted by participants included: a need to take a firmer stance in their dealings with the US, the approval of pipelines, housing (making it still too difficult for first-time home buyers), spending more on military, making sure that large investments and decisions actually have an impact on average Canadians, support for seniors and the disabled, lack of healthcare funding, and providing too much international financial aid and refugee support (i.e. helping other countries instead of helping Canadians who need help).

Taxation

Many in each group felt that the tax system in Canada needs to change. Spontaneous suggestions tended to be limited to broad measures or feelings of inequity, among which the most common included:

- a general feeling of tax burden;
- a sense that large corporations are not paying enough, or have access to too many avenues for tax diversion;
- frustration related to the ability for high income Canadians to use offshore accounts and other strategies to reduce, if not completely eliminate, their share of taxes;
- the complexity of the tax code and of the process for completing one's tax return;
- the disproportionate burden of taxes on the middle-class and that group's inability to leverage or access opportunities to reduce their taxes compared to higher income Canadians.

Awareness of any recent ideas proposed to reform the tax system in Canada was extremely low. At most, a handful of participants had heard of possible measures targeting small corporations; among them, few knew enough to formulate an opinion on the potential benefits or drawbacks of these measures.

Although the statement is not immediately intuitive (the moderator often had to repeat the statement), there was strong agreement that "people in similar circumstances, earning similar incomes, should pay similar amounts of tax."

As an in-session exercise, participants were presented with a list of seven broad groups and asked to identify up to three groups they believe are paying their fair share of taxes and up to three groups they believe should be paying more tax. No group definitions were provided to participants – they were simply asked to use their own personal interpretations of each group. Results from this exercise revealed the following:

- Participants consistently flagged large corporations and the "top 1%" as the ones who should be paying more in taxes, and small corporations and middle-income earners as the ones already paying their fair share of taxes.
- Participants tended to have a neutral stance or no opinion regarding high-income retired Canadians and charities. A few would like to see charities pay more in taxes since they do not pay any right now, although these participants tended to include religious organizations in this group and those are the organizations they really had in mind when they felt "charities" should be paying more.
- Large corporations were often flagged because they were seen as having more financial resources to afford more taxes, they were seen as having access to many other tax "breaks" (including government subsidies and tax incentives) and many believed they have the ability to afford accountants to help them better manage taxation in general, including tax diversion strategies.

- When thinking about small corporations, participants tended to be reminded of local or family-owned small businesses that are close to the communities in which they are located. These ranged from the neighbourhood plumber to local shops, boutiques and restaurants.
- Participants almost always over-estimated the lower threshold to qualify to be part of the “top 1% of income earners.” Most were surprised that it starts at roughly \$227,000/year.
- Participants were asked to identify which, among three specific strategies, they would rather see the government focus on when reforming the tax system for the top 1% of income earners. There was a strong preference for “doing more to prevent tax evasion” and “closing tax loopholes that are primarily used by the richest Canadians to reduce the taxes they pay” over “raising income tax rates.” Raising rates was seen as futile if opportunities to circumvent these taxes in the first place were not addressed.
- Participants had some difficulty estimating the income bracket that defined a middle-income household. There was some agreement that if the definition is income-based, there could not be a single definition for the entire country. It was argued, for instance, that a middle-income household in Toronto is not the same as one in Sudbury. The lower threshold (for a household) could be as low as \$40K-\$50K/year and as high as \$100K-\$150K/year with many choosing a bracket inside this range. A common response was roughly \$70K to \$120K per year.

Reactions to Tax Fairness and Competitiveness

Two specific corporate tax scenarios were explored with participants. For each scenario, the moderator took extra care to provide context and to avoid using any technical terminology. For instance, in each session, the moderator generally explained the following:

***Mise en scène:** The tax system is, of course, very complex – I am not expecting you to be a tax expert to share your thoughts on some of the issues I’ll be raising here.*

In Canada, we have different tax rates - we have personal income taxes, which individuals pay, as well as business income taxes, which corporations pay. The amount of taxes these groups pay depend on many factors, but the overarching goal is ensuring that tax rates are fair and that they support economic growth. In general, corporations are taxed at a lower rate compared to individuals. And small businesses are generally taxed at a lower rate compared to larger ones. Certain tax exemptions are also available to businesses to encourage growth and investment.

Scenario 1: Small business owners have access to a tax exemption on the profit from selling their business.

When presented with a scenario where an investment property owner selling their property realizes a similar profit as someone selling their small business, nearly all participants agreed that the small business owner should have access to the tax exemption on the capital gains from selling the business whereas the investment property owner should not. Admittedly, a fair share of participants could not formulate a clear

opinion on this issue and they only tended to voice an opinion after one or two arguments from other participants had been shared.

Ultimately, many considered the small business as an “active” investment where the owner is seen as “building something.” In other words, the business is contributing to the economy, it is paying business taxes, it is contributing or supporting the local community and probably employs people (who in turn pay taxes and support the local community and economy). Conversely, buying an investment property was more likely to be seen as a “passive” investment that benefits nobody else but the property owner. In fact, for a few, the property owner may be contributing to speculation and/or an increase in the value of properties, which was not seen as a positive outcome.

The tax exemption was also seen as a reward to the business owner for all the long, hard hours they invested in their business to make sure it survives and succeeds.

The topic of “risk” also entered into the equation for some participants. The business owner was seen by most as taking on more risk than the investment property owner. In fact, the business owner was seen by most as taking on a lot of risk in general, and that the tax exemption not only rewarded the business owner for taking on that risk but it also encourages entrepreneurship, something that was widely seen as beneficial for the country and the economy.

There were a select few who felt an investment property owner is also undertaking some risk and, depending on the property, may have needed to maintain the property and hire people in a way that is similar to what a small business might do. To them, this might entitle the property owner to the same tax exemption as the small business owner when they sell their property.

Scenario 2: Small businesses have a lower tax rate than large businesses in Canada – 10.5% and 15% respectively.

Nearly all participants felt that small businesses should have a lower tax rate than larger ones. Not only are participants already predisposed to feeling that larger corporations should be paying more taxes, they also recognized that starting a small company is difficult and that a lower tax rate can not only encourage entrepreneurship but also help the company grow in the early years.

As well, any argument that would suggest that some small companies refuse to grow in order to avoid paying a higher tax rate was received with scepticism and disbelief by most participants. They suspected that if small businesses are not growing, it is not because of a concern for the higher tax rate. A few suggested that if this is a genuine concern, a solution could be a more graduated or progressive tax scale similar to personal income tax rates.

Other Tax Measures

Tax on Sugary Drinks

There was some awareness of a tax on sugary drinks, although many were more likely to have heard of initiatives in the US. Many were in favour of the tax, fully recognizing that there is obesity and that it could help alleviate pressure on the healthcare system over time. Those less in favour were not convinced that a tax would discourage consumption and were more likely to view the measure as a tax grab. None of the participants recognized that lower-income consumers would be paying more of this tax in proportion to their income.

Many also agreed that whether or not a new tax was introduced, other measures were needed to dissuade Canadians, especially youth, from consuming sugary drinks. Suggestions included providing more exercise and education programs, as well as removing vending machines from certain locations such as schools and hospitals. A few also felt that manufacturers should be taxed instead of consumers. A few also suggested that healthier options need to become more affordable.

Finally, some felt that for such a tax to have a meaningful dissuasive effect, it would need to be high enough for consumers to notice.

Cannabis Revenues

Support for the legalization of cannabis was mixed in every city. Irrespective of their position on the issue, participants widely supported the idea of using new tax revenues from the sale of cannabis to fund drug or general addiction support/rehabilitation programs, mental health programs, education of youth in schools focused on the risks related to consuming cannabis, law enforcement, and healthcare in general.

Canada Employment Credit

There was no awareness of the Canada Employment Credit. The moderator provided a brief explanation of the credit and then presented participants with the following scenario: *what if higher income earners no longer received the credit but lower income earners would continue to receive it, and some could receive more?* Most participants generally tended to agree that this would make the tax system more fair. There was some interest in a graduated reduction in the credit as income increases over the idea of a defined limit.

Allocating New Tax Revenues

Participants were asked to rank in order of preference how they would like the government to allocate new revenue raised across the five following categories:

- Divide up the revenues and mail a check for that amount to every Canadian.
- Provide the money to provinces through transfers that fund healthcare.
- Invest in job skills training or retraining.
- Lower taxes for all Canadians.

- Cut taxes for those in the lowest tax bracket.

Results from this exercise revealed that participants prioritized providing the money to provinces through transfers that fund healthcare, especially in sessions held in Victoria and Laval. The next most popular option was investing in job skills training and retraining, especially in Victoria. Lowering taxes for all Canadians and lowering taxes for those in the lowest tax bracket were equally popular but still ranked third behind the first two options noted above. Finally, dividing up the revenues and mailing a check for that amount to every Canadian was by far the least preferred of the options presented.

Standard of Living

Initially, participants had some trouble determining whether Canadians 25 years ago were better or worse off than they were today. After some discussion though, they concluded that “life was simpler” back then and that we didn’t have as many bills, that life was more affordable and that most households could still get by with one car and one income earner. By extension, many concluded that the standard of living was probably better 25 years ago. Looking to the future, many participants tended to feel the next generation will have it worse than we do today, mostly because of the unaffordable nature of housing, the ongoing inability to keep salaries in line with inflation and the increasing instability in employment (e.g. having many jobs over time rather than having a single career).

Workplace of the Future

Many participants recognized that to be successful in the economy of the future, Canadians need to be increasingly nimble and flexible, not only to adapt to evolving working conditions and requirements within the same business or industry, but also to be able to adapt across different types of jobs and industries over the course of their lives. They will also need to invest in ongoing training and education and be prepared to live multiple careers instead of working for one company their entire life. Participants also recognized that automation and technology is playing a growing role and that a successful career will depend on their ability to adapt and retool in light of this evolution. In fact, many not only saw their children or young Canadians around them already living this reality, but many in the mature workforce would also say that they have had to face this change in the workplace.

Participants were specifically asked about their level of concern with the following four possible challenges moving forward:

- Role of technology, like automation, Artificial Intelligence (AI), etc.
- Having the right skills for the jobs of tomorrow
- Having the right education for the jobs of tomorrow
- “Job Churn” (i.e., having many jobs or careers over the course of your life)

Participants were most likely to be concerned with having the right skills and the right education for the jobs of tomorrow. In fact, participants felt these two challenges go hand in hand. The role of technology was the next most common concern, with participants sharing an array of opinions on the advantages and challenges related to technology – for instance:

- Some felt that technology, like automation and AI, will lead to job elimination and that this will force some of them to find entirely new jobs or careers;
- Some felt that technology is becoming increasingly engrained or is constantly changing in their field and that they need to keep learning in order to remain current and relevant;
- Some felt that technology is creating new opportunities in the workforce – that there will be jobs and types of work that will exist 10 years from now that do not exist today.

Job churn was a real concern for roughly one out of four participants, although it was the challenge that garnered the least amount of concern overall.

In considering these various challenges, participants agreed that the Government of Canada has a role to play in helping Canadians adapt and remain competitive in the workplace of tomorrow. They did not think the burden falls exclusively on the Government's shoulders but they are nonetheless in a good position to create incentives, determine priorities and develop programs that can benefit both workers and employers. Some of the ways in which participants felt the Government of Canada could help included:

- Making it easier and more affordable for Canadians to train throughout their lifetime, irrespective of life stage. For instance, younger Canadians with families, a mortgage, and other payments could not easily afford to take time off to train or go to school. Older, more mature workers feel they need a more personalized approach to retraining rather than being presented with cookie-cutter programs. Cost is particularly challenging since the programs can be expensive. But there is also the added issue of often needing to take time off work in order to train, retrain or go to school, resulting for some in lost income.
- Some felt that more needs to be invested in aligning curriculums and post-secondary programs with the needs of the marketplace.

Survey Research Findings

This section of the report is dedicated to the research results derived from the national survey of Canadian households.

Priorities for the Government of Canada

Respondents were asked to openly suggest issues the Government of Canada should focus on most. The top priority suggested by nearly one fifth of Canadians (18%) is the economy and the creation of jobs or reduction of unemployment. Close to one tenth of respondents feel the priority should be health care (9%), the environment (including general environmental issues, climate change and global warming – 9%), or immigration and refugees (7%).

To a lesser extent, Canadians feel the federal government should focus on foreign affairs and international trade (5%), taxes (5%), crime and national security (4%), education and schools (4%), the homeless and poverty (3%), its spending (the budget and deficit – 3%), aboriginal issues (3%), social issues in general (3%), among other suggestions.

TOP PRIORITY	n=2000
Economy/jobs (Net)	18%
<i>Economy / economic issues</i>	11%
<i>Jobs / unemployment issues</i>	6%
Health care / hospitals	9%
Environment (Net)	9%
<i>Environmental issues</i>	6%
<i>Climate change / global warming</i>	3%
Immigration / refugees	7%
Foreign affairs / international trade	5%
Taxes	5%
Crime / national security	4%
Education / schools	4%
Homelessness / poverty	3%
Government spending / budget / deficit	3%
Aboriginal issues	3%
Social issues (general)	3%
Government representation / accountability	2%
Income disparity / minimum wage	2%
Cost of living / debt / bills	2%
Seniors issues	2%
Affordable housing / housing issues	1%
Infrastructure / roads	1%
Energy / oil and gas issues / pipelines	1%

TOP PRIORITY	n=2000
Other	4%
Don't know/Refused	13%

Q1A: Thinking of the issues facing Canada today, which one would you say the Government of Canada should focus on most? Base: All Respondents, n=2,000.

Once survey participants expressed their suggestions for a top priority for the federal government, they were asked if other issues should be addressed. The economy and creation of jobs or reduction of unemployment were mentioned by 10% of respondents, and nearly the same number referred to health care and hospitals (9%), crime and national security (9%), and immigration or refugees (7%).

The environment did not figure in the top-five secondary priorities; however, it was mentioned by roughly 5% of Canadians along with other issues such as education and schools (6%), foreign affairs and international trade (5%), general social issues (5%), taxes (5%), and government representation and accountability (5%).

OTHER PRIORITIES	n=1,741
Economy/jobs (Net)	10%
<i>Economy / economic issues</i>	6%
<i>Jobs / unemployment issues</i>	4%
Health care / hospitals	9%
Crime / national security	9%
Immigration / refugees	7%
Education / schools	6%
Foreign affairs / international trade	5%
Social issues (general)	5%
Environment (Net)	5%
<i>Environmental issues</i>	4%
<i>Climate change / global warming</i>	2%
Taxes	5%
Government representation / accountability	5%
Government spending / budget / deficit	4%
Homelessness / poverty	3%
Aboriginal issues	3%
Seniors issues	3%
Cost of living / debt / bills	3%
Affordable housing / housing issues	2%
Income disparity / minimum wage	2%
Infrastructure / roads	2%
Energy / oil and gas issues / pipelines	1%
Other	2%

OTHER PRIORITIES	n=1,741
Don't know/Refused	35%

Q1B: Are there any others? Base: Respondents who provided a top priority in the previous question, n=1,741.

Some subgroup differences were observed when it comes to identifying the priorities for government. For example, the economy is more likely to be a top priority for men than women (20% vs. 15%) as are foreign affairs (7% vs. 3%), government spending (5% vs. 2%), and, in terms of secondary priorities, crime and national security (11% vs. 7%). Conversely, women are more likely to suggest focusing on health care issues as a top priority (13% vs. 6%), education (5% vs. 2%), homelessness (4% vs. 2%), aboriginal issues (4% vs. 2%) and other social issues (4% vs. 2%).

Although the youngest group of respondents is more likely to indicate not knowing or refusing to provide priorities for the government (19% vs. 10%), some differences are observed based on the age of respondents. Those at least 35 years old are more likely than younger respondents to suggest focusing on the economy and the creation of jobs (20% vs. 12%), while those under 55 would prefer a focus on education and schools (5% vs. 1%), or income disparity (3% vs. 1%). In particular, respondents at least 55 years of age are more likely than their younger counterparts to suggest focusing on immigration and refugees (9% vs. 6%), senior issues (3% vs. 1%), and as a secondary priority immigration and refugees (11% vs. 6%).

ISSUES GOVERNMENT OF CANADA SHOULD FOCUS ON (TOP PRIORITY)					
	Gender		Age Group		
	Men (n=1,000)	Women (n=1,000)	18-34 (n=559)	35-54 (n=773)	55+ (n=657)
Economy/jobs (Net)	20%	15%	12%	22%	19%
<i>Economy / economic issues</i>	14%	9%	8%	14%	12%
<i>Jobs / unemployment issues</i>	6%	6%	4%	7%	7%
Health care / hospitals	6%	13%	7%	11%	10%
Environment (Net)	9%	8%	9%	9%	8%
<i>Environmental issues</i>	6%	6%	6%	7%	5%
<i>Climate change / global warming</i>	3%	2%	3%	2%	3%
Immigration / refugees	7%	7%	6%	6%	9%
Foreign affairs / international trade	7%	3%	4%	5%	6%
Taxes	5%	5%	4%	5%	6%
Crime / national security	4%	5%	6%	3%	4%
Education / schools	2%	5%	7%	4%	1%
Homelessness / poverty	2%	4%	3%	3%	3%
Government spending / budget / deficit	5%	2%	2%	3%	4%
Aboriginal issues	2%	4%	5%	1%	3%

ISSUES GOVERNMENT OF CANADA SHOULD FOCUS ON (TOP PRIORITY)					
	Gender		Age Group		
	Men (n=1,000)	Women (n=1,000)	18-34 (n=559)	35-54 (n=773)	55+ (n=657)
Social issues (general)	2%	4%	4%	2%	2%
Government representation / accountability	3%	2%	2%	2%	2%
Income disparity / minimum wage	3%	1%	2%	3%	1%
Cost of living / debt / bills	2%	1%	2%	2%	2%
Seniors issues	1%	2%	<1%	1%	3%
Affordable housing / housing issues	1%	1%	1%	2%	1%
Infrastructure / roads	1%	1%	1%	-	1%
Energy / oil and gas issues / pipelines	1%	0%	1%	1%	0%
Other	5%	3%	4%	5%	3%
Don't know/Refused	12%	14%	19%	10%	11%

Q1A: Thinking of the issues facing Canada today, which one would you say the Government of Canada should focus on most? Base: All Respondents, n=2,000.

SECONDARY ISSUES THE GOVERNMENT OF CANADA SHOULD FOCUS ON					
	Gender		Age Group		
	Men (n=878)	Women (n=863)	18-34 (n=447)	35-54 (n=696)	55+ (n=590)
Economy/jobs (Net)	11%	9%	8%	12%	10%
<i>Economy / economic issues</i>	8%	4%	5%	7%	6%
<i>Jobs / unemployment issues</i>	4%	4%	4%	4%	4%
Health care / hospitals	7%	11%	8%	10%	9%
Crime / national security	11%	7%	8%	10%	8%
Immigration / refugees	7%	8%	5%	6%	11%
Education / schools	4%	8%	4%	9%	4%
Foreign affairs / international trade	7%	4%	4%	5%	6%
Social issues (general)	5%	6%	5%	6%	4%
Environment (Net)	6%	5%	6%	5%	5%
<i>Environmental issues</i>	4%	4%	5%	5%	3%
<i>Climate change / global warming</i>	2%	1%	2%	<1%	3%
Taxes	6%	4%	3%	5%	5%
Government representation / accountability	5%	4%	4%	4%	5%
Government spending / budget / deficit	5%	4%	4%	4%	5%
Homelessness / poverty	2%	4%	3%	3%	3%
Aboriginal issues	2%	4%	2%	3%	4%
Seniors issues	2%	3%	1%	2%	5%
Cost of living / debt / bills	3%	2%	3%	3%	2%

SECONDARY ISSUES THE GOVERNMENT OF CANADA SHOULD FOCUS ON					
	Gender		Age Group		
	Men (n=878)	Women (n=863)	18-34 (n=447)	35-54 (n=696)	55+ (n=590)
Affordable housing / housing issues	2%	2%	3%	2%	1%
Income disparity / minimum wage	2%	2%	2%	2%	2%
Infrastructure / roads	1%	2%	2%	2%	1%
Energy / oil and gas issues / pipelines	2%	1%	1%	2%	1%
Other	3%	2%	2%	2%	2%
Don't know/Refused	35%	34%	43%	31%	33%

Q1B: Are there any others? Base: Respondents who provided a top priority in the previous question, n=1,741.

Regional differences observed in terms of “top priority” include the following:

- *Economy issues* resonate more in Alberta (27%) and Atlantic Canada (22%) than in other regions (16%).
- *Health care* issues are much less of a concern in Alberta (2%) compared to other regions (10%).
- *The environment* is more likely to be suggested as a priority in Quebec (13%), British Columbia (9%), and Ontario (8%), than in any other region (5%).
- *Immigration and refugees* are more likely to be suggested by those in Alberta (12%) and Quebec (9%), than residents in other parts of the country (5%).
- *Taxes* are less likely to be mentioned in Quebec (2%) and Ontario (4%) than in other regions (7%).
- *Crime and national security* are less likely to be an issue mentioned in Alberta (1%) or British Columbia (3%), than in other regions (5%).
- *Government spending* is less likely to be mentioned in Quebec (1%), and Manitoba or Saskatchewan (3%), than in other parts of the country (4%).

ISSUES GOVERNMENT OF CANADA SHOULD FOCUS ON (TOP PRIORITY)						
	Region					
	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK (n=200)	AB (n=200)	BC (n=300)
Economy/jobs (Net)	22%	15%	17%	17%	27%	16%
<i>Economy / economic issues</i>	12%	11%	10%	14%	15%	12%
<i>Jobs / unemployment issues</i>	10%	4%	7%	3%	12%	4%
Health care / hospitals	15%	9%	11%	12%	2%	9%
Environment (Net)	4%	13%	8%	5%	6%	9%
<i>Environmental issues</i>	3%	10%	5%	4%	4%	6%
<i>Climate changes / global warming</i>	1%	3%	3%	1%	2%	3%
Immigration / refugees	4%	9%	5%	5%	12%	6%
Foreign affairs / international trade	4%	6%	5%	4%	4%	3%
Taxes	7%	2%	4%	7%	9%	6%
Crime / national security	4%	6%	5%	5%	1%	3%
Education / schools	3%	6%	3%	4%	1%	4%
Homelessness / poverty	3%	3%	3%	2%	2%	4%
Government spending / budget / deficit	4%	1%	3%	3%	7%	5%
Aboriginal issues	3%	1%	4%	3%	2%	4%
Social issues (general)	3%	2%	3%	1%	3%	4%
Government representation / accountability	2%	1%	2%	4%	3%	3%
Income disparity / minimum wage	2%	2%	3%	1%	-	2%
Cost of living / debt / bills	2%	1%	3%	2%	2%	1%
Seniors issues	2%	1%	2%	1%	2%	1%
Affordable housing / housing issues	<1%	<1%	1%	1%	-	5%
Infrastructure / roads	1%	1%	1%	1%	<1%	<1%
Energy / oil and gas issues / pipelines	1%	1%	1%	<1%	2%	-
Other	1%	4%	4%	5%	3%	5%
Don't know/Refused	11%	18%	11%	16%	12%	10%

Q1A: Thinking of the issues facing Canada today, which one would you say the Government of Canada should focus on most? Base: All Respondents, n=2,000.

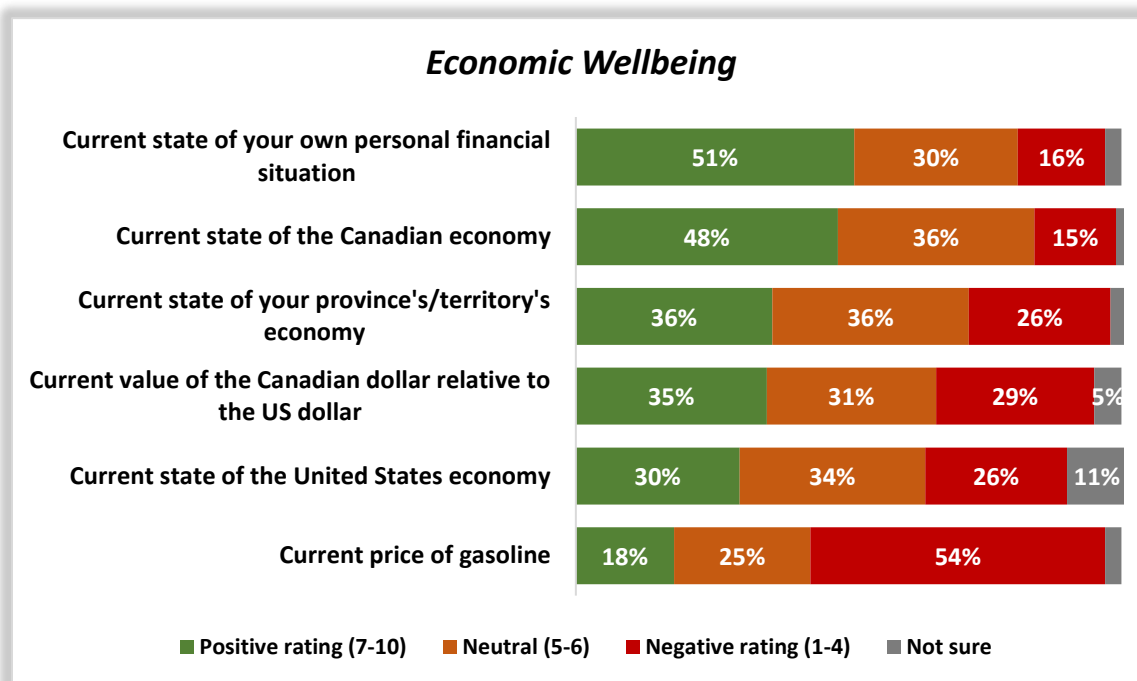
SECONDARY ISSUES THE GOVERNMENT OF CANADA SHOULD FOCUS ON						
	Region					
	ATL (n=311)	QC (n=325)	ON (n=489)	MB/SK (n=170)	AB (n=175)	BC (n=271)
Economy/jobs (Net)	12%	12%	10%	6%	8%	10%
<i>Economy / economic issues</i>	5%	9%	5%	4%	5%	7%
<i>Jobs / unemployment issues</i>	7%	4%	5%	3%	3%	4%
Health care / hospitals	15%	12%	8%	7%	4%	9%
Crime / national security	5%	7%	12%	7%	9%	7%
Immigration / refugees	6%	11%	5%	8%	9%	7%
Education / schools	7%	9%	5%	6%	2%	5%
Foreign affairs / international trade	4%	7%	5%	5%	5%	6%
Social issues (general)	3%	6%	6%	2%	4%	4%
Environment (Net)	4%	6%	5%	5%	1%	7%
<i>Environmental issues</i>	3%	4%	4%	5%	1%	6%
<i>Climate change / global warming</i>	1%	2%	2%	1%	-	2%
Taxes	6%	2%	5%	5%	7%	5%
Government representation / accountability	3%	2%	5%	6%	8%	5%
Government spending / budget / deficit	2%	2%	5%	3%	8%	4%
Homelessness / poverty	2%	2%	4%	2%	1%	5%
Aboriginal issues	5%	1%	4%	3%	3%	2%
Seniors issues	4%	2%	4%	2%	3%	1%
Cost of living / debt / bills	1%	2%	4%	1%	4%	1%
Affordable housing / housing issues	-	<1%	3%	1%	3%	4%
Income disparity / minimum wage	1%	1%	3%	1%	1%	<1%
Infrastructure / roads	1%	1%	2%	1%	2%	3%
Energy / oil and gas issues / pipelines	1%	1%	1%	<1%	3%	2%
Other	2%	4%	1%	2%	2%	2%
Don't know/Refused	37%	33%	33%	42%	38%	33%

Q1B: Are there any others? Base: Respondents who provided a top priority in the previous question, n=1,741.

Assessment of the Economy

Economic Wellbeing

Several questions were asked to survey participants related to current economic wellbeing. Respondents used a scale from 1 (terrible) to 10 (excellent) to rate each statement. Roughly half of participants provided a rating from 7 to 10 when asked to rate the current state of their personal financial situation (51%), and the current state of the Canadian economy (48%). Roughly one third provided a positive rating for the current state of the economy in their province or territory (36%), the current value of the Canadian dollar relative to the U.S. dollar (35%), and the current state of the United States economy (30%). In fact, respondents are almost evenly divided when they were asked to rate the value of the Canadian dollar and the current state of the U.S. economy. Respondents are more inclined to provide a negative rating when it comes to the price of gasoline for which 18% gave a positive rating compared to 54% who provided a rating of 1 to 4.



Q2: Using a scale from 1 to 10, where 1 is terrible and 10 is excellent, how would you rate the following: Base: All Respondents, n=2,000.

Men are more likely to give positive ratings to the current state of the Canadian economy compared to women (51% vs. 45%), as well as to the value of the Canadian dollar (39% vs. 31%), and the state of the U.S. economy (36% vs. 24%). People under 35 years of age are more likely than older respondents to rate positively the Canadian economy's current state (55% vs. 45%), and when compared to those 55 and older

they are more likely to rate positively the current state of the economy in their territory or province (40% vs. 32%), and the price of gasoline (22% vs. 15%). Of all age groups, those at least 55 are the most likely to rate negatively the price of gasoline (62%), the economy in their province or territory (32%), the U.S. economy (29%), and the current state of the Canadian economy (19%).

ECONOMIC WELLBEING					
	Gender		Age Group		
	Men (n=1,000)	Women (n=1,000)	18-34 (n=559)	35-54 (n=773)	55+ (n=657)
Current state of your own personal financial situation					
Positive rating (7-10)	52%	51%	52%	53%	50%
Neutral (5-6)	30%	30%	30%	29%	30%
Negative rating (1-4)	16%	15%	17%	16%	15%
Not sure	2%	4%	1%	3%	5%
Current state of the Canadian economy					
Positive rating (7-10)	51%	45%	55%	47%	43%
Neutral (5-6)	34%	37%	32%	37%	36%
Negative rating (1-4)	13%	16%	11%	14%	19%
Not sure	1%	2%	2%	1%	1%
Current state of your province's/territory's economy					
Positive rating (7-10)	38%	34%	40%	36%	32%
Neutral (5-6)	34%	38%	38%	38%	33%
Negative rating (1-4)	26%	25%	19%	25%	32%
Not sure	3%	3%	4%	2%	3%
Current value of the Canadian dollar relative to the U.S. dollar					
Positive rating (7-10)	39%	31%	34%	38%	33%
Neutral (5-6)	29%	33%	31%	28%	35%
Negative rating (1-4)	28%	30%	30%	29%	28%
Not sure	4%	6%	5%	5%	5%
Current state of the United States economy					
Positive rating (7-10)	36%	24%	31%	30%	28%
Neutral (5-6)	34%	34%	36%	36%	30%
Negative rating (1-4)	23%	28%	21%	25%	29%
Not sure	8%	15%	12%	9%	13%
Current price of gasoline					
Positive rating (7-10)	20%	17%	22%	19%	15%
Neutral (5-6)	25%	25%	29%	25%	21%
Negative rating (1-4)	52%	55%	45%	54%	62%
Not sure	3%	3%	4%	3%	4%

Q2: Using a scale from 1 to 10, where 1 is terrible and 10 is excellent, how would you rate the following: Base: All Respondents, n=2,000.

From a regional perspective, respondents living in Alberta are the most likely to rate negatively the state of the Canadian economy (25% vs. 12%), and the least likely to rate it positively (28% vs. 50%). Along with Atlantic Canada residents, Albertans are also the most likely to rate negatively the state of their province's

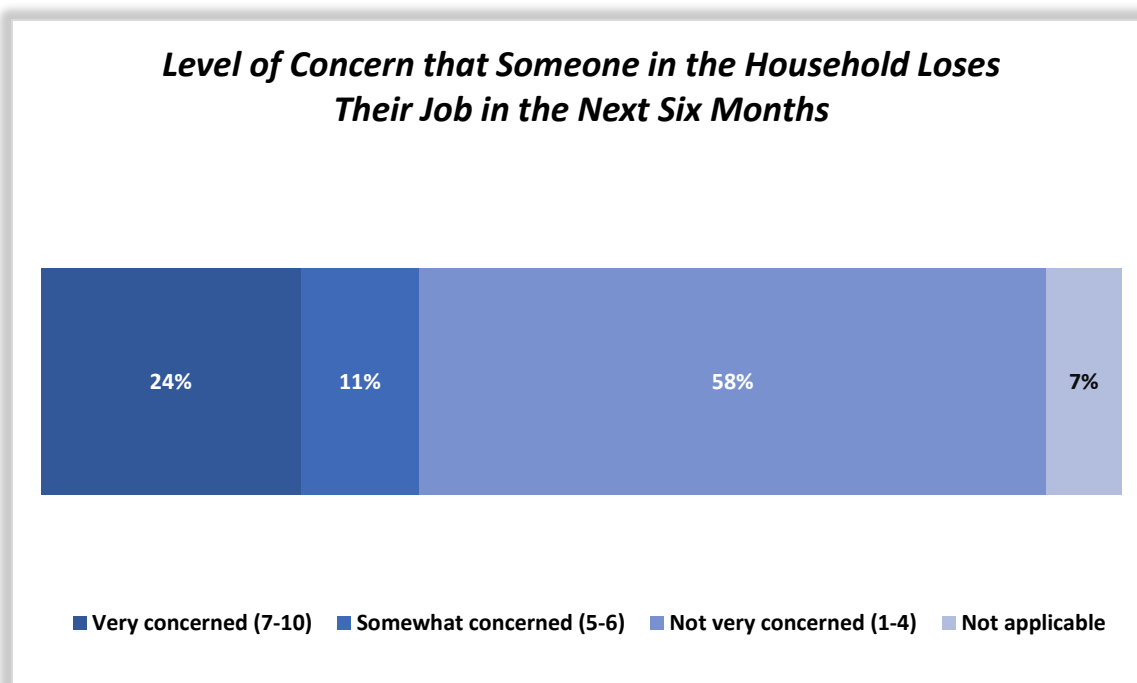
economy (37% and 46% respectively), compared to other regions (23%), who are in turn more likely to rate this element positively (39% vs. 19%). The U.S. economy is more likely to be rated positively by those in Quebec (33%), and most negatively by those in British Columbia (32%) and Ontario (28%). The price of gasoline is more likely to be rated negatively in Quebec (65%), British Columbia (60%), Ontario (54%), and Atlantic Canada (53%), and is rated most positively in Alberta, and Manitoba and Saskatchewan (33% respectively).

ECONOMIC WELLBEING						
	Region					
	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK (n=200)	AB (n=200)	BC (n=300)
Current state of your own personal financial situation						
Positive rating (7-10)	51%	52%	52%	50%	49%	51%
Neutral (5-6)	30%	30%	28%	34%	31%	29%
Negative rating (1-4)	17%	14%	16%	13%	17%	16%
Not sure	2%	4%	3%	2%	3%	3%
Current state of the Canadian economy						
Positive rating (7-10)	49%	52%	51%	39%	28%	50%
Neutral (5-6)	35%	31%	34%	42%	45%	38%
Negative rating (1-4)	14%	15%	14%	16%	25%	11%
Not sure	2%	2%	2%	2%	1%	1%
Current state of your province's/territory's economy						
Positive rating (7-10)	20%	40%	36%	35%	18%	47%
Neutral (5-6)	40%	37%	34%	35%	38%	35%
Negative rating (1-4)	37%	20%	26%	26%	43%	16%
Not sure	2%	3%	3%	3%	1%	2%
Current value of the Canadian dollar relative to the U.S. dollar						
Positive rating (7-10)	37%	31%	37%	32%	34%	37%
Neutral (5-6)	29%	33%	29%	38%	27%	35%
Negative rating (1-4)	28%	31%	28%	27%	35%	25%
Not sure	6%	6%	6%	3%	4%	4%
Current state of the United States economy						
Positive rating (7-10)	30%	33%	28%	24%	29%	30%
Neutral (5-6)	31%	32%	35%	37%	36%	29%
Negative rating (1-4)	24%	21%	28%	23%	24%	32%
Not sure	14%	14%	9%	16%	11%	9%
Current price of gasoline						
Positive rating (7-10)	14%	13%	17%	33%	33%	14%
Neutral (5-6)	29%	20%	25%	29%	31%	23%
Negative rating (1-4)	53%	65%	54%	34%	35%	60%
Not sure	3%	2%	4%	4%	1%	3%

Q2: Using a scale from 1 to 10, where 1 is terrible and 10 is excellent, how would you rate the following: Base: All Respondents, n=2,000.

Job Security

Respondents were asked how concerned they were that they or someone else in their household may lose their job in the next six months, again, using a scale from 1 to 10. Nearly one quarter of respondents (24%) are very concerned (provided a rating between 7 and 10), 11% are somewhat concerned (ratings 5 or 6), while 58% are not very concerned.



Q3: How concerned are you, if at all, that you or someone in your household may lose their job in the next six months? Base: All Respondents, n=2,000.

Women are more likely to be very concerned about job security, compared to men (26% vs. 21%). Concern is also highest among respondents 35 to 54 years old (28%). From a regional perspective, respondents in Alberta (30%) and Ontario (26%) are more likely to be concerned about job security, while those in Manitoba or Saskatchewan are more likely to not be concerned about it (65%).

JOB SECURITY					
	Gender		Age Group		
	Men (n=1,000)	Women (n=1,000)	18-34 (n=559)	35-54 (n=773)	55+ (n=657)
Level of concern that you or someone in your family may lose their job in next six months					

Very concerned (7-10)	21%	26%	23%	28%	20%
Somewhat concerned (5-6)	10%	12%	12%	12%	10%
Not very concerned (1-4)	61%	54%	62%	59%	52%
Not applicable	7%	7%	2%	<1%	18%

JOB SECURITY						
	Region					
	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK (n=200)	AB (n=200)	BC (n=300)
Level of concern that you or someone in your family may lose their job in next six months						
Very concerned (7-10)	20%	21%	26%	21%	30%	21%
Somewhat concerned (5-6)	10%	12%	12%	9%	10%	11%
Not very concerned (1-4)	62%	57%	56%	65%	55%	59%
Not applicable	8%	9%	6%	4%	5%	8%

Q3: How concerned are you, if at all, that you or someone in your household may lose their job in the next six months? Base: All Respondents, n=2,000.

Economic Confidence

Survey participants were asked to rate how different statements made them feel regarding the Canadian economy, using a scale from 1 to 10, where 1 meant it made them feel a lot worse, and 10 meant it made them feel a lot better.

Aligning well with the top priority for the government to focus on new jobs, over 6 in 10 respondents would feel very good (i.e. gave ratings from 7 to 10) if new jobs are created (65%), or if unemployment decreases (63%).

Over half of respondents would feel better about the economy if poverty were to decrease (58%), if Canadians had less household debt (56%), or if Canadians had more to save for retirement (56%).

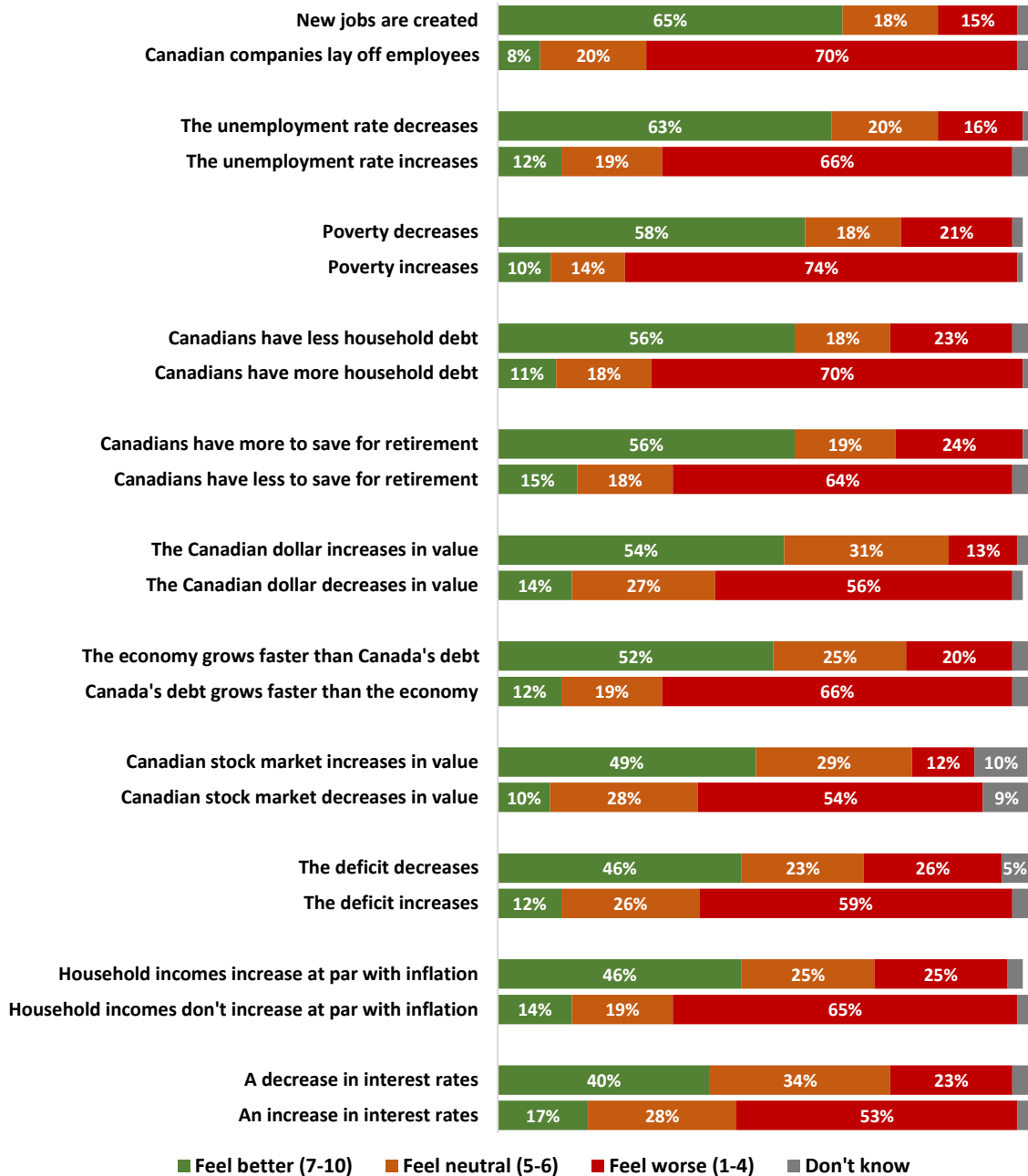
Roughly half would feel better about the economy if the Canadian dollar were to increase in value (54%), if the economy grew faster than Canada's debt (52%), or if the Canadian stock market were to increase in value (49%).

Less than half of respondents would feel better if the deficit decreases (46%), if the household incomes increase at par with inflation (46%), or if there was a decrease in interest rates (40%).

Sentiment or economic confidence is not proportionately reversed when the opposite of all these statements is presented. In other words, for many of the scenarios presented, the upside of a positive economic development is smaller than the downside of a negative economic development. This is the case when it comes to a shift in poverty (74% feel worse if poverty increases but only 58% feel better if it decreases), household debt (70% versus 56%), retirement savings (64% vs. 56%), debt to GDP ratio (66%

vs. 52%), the size of the deficit (59% vs. 46%), household incomes keeping par with inflation (66% vs. 52%) and a shift in interest rates (53% vs. 40%).

What Shapes Economic Sentiment



Q4: How would each of the following statements make you feel regarding the Canadian economy? Base: All Respondents, n=2,000 (split samples).

Analysis based on demographics show gender does not play a significant role in the position Canadians take on the statements presented to them. Women are only more likely than men to say they would feel better if two of the scenarios happened: if the Canadian dollar increased in value (58% vs. 50%), and if the household income increased at par with inflation (51% vs. 40%).

However, age seems to have more of an impact on how respondents feel about different scenarios. Overall, the younger respondents are, the more likely they are to feel better about the Canadian economy. For instance, 75% of those 18 to 34 would feel better if new jobs were created, 67% would feel better if poverty decreased, 65% if the Canadian dollar increased in value, 65% if Canadians had more to save for retirement, 65% if Canadians had less household debt, 60% if the economy grew faster than Canada's debt, 57% if the Canadian stock market increased in value, 52% if the deficit decreased, and 48% if interest rates decreased. Respondents at least 55 years old are the least likely to feel better about these same scenarios, while those between 35 and 54 side with the young group on the following: new jobs being created (67%), Canadians having more to save for retirement (59%), the economy growing faster than the debt (54%), the stock market increasing in value (53%), and a decrease in interest rates (41%).

WHAT SHAPES ECONOMIC SENTIMENT					
	Gender		Age Group		
	Men (n=504)	Women (n=504)	18-34 (n=271)	35-54 (n=407)	55+ (n=323)
New jobs are created					
Feel better (7-10)	65%	65%	75%	67%	56%
Feel neutral (5-6)	20%	17%	17%	19%	19%
Feel worse (1-4)	14%	16%	7%	14%	22%
Don't know	1%	3%	1%	1%	3%
Canadian companies lay off employees	Men (n=496)	Women (n=496)	18-34 (n=288)	35-54 (n=366)	55+ (n=334)
Feel better (7-10)	9%	8%	8%	9%	8%
Feel neutral (5-6)	22%	17%	19%	19%	20%
Feel worse (1-4)	68%	72%	71%	70%	70%
Don't know	1%	3%	3%	2%	2%
The unemployment rate decreases	Men (n=505)	Women (n=498)	18-34 (n=273)	35-54 (n=385)	55+ (n=338)
Feel better (7-10)	63%	63%	68%	62%	60%
Feel neutral (5-6)	20%	19%	16%	22%	20%
Feel worse (1-4)	15%	17%	15%	15%	18%
Don't know	1%	1%	<1%	1%	1%
The unemployment rate increases	Men (n=495)	Women (n=502)	18-34 (n=286)	35-54 (n=388)	55+ (n=319)
Feel better (7-10)	10%	14%	10%	14%	12%
Feel neutral (5-6)	22%	16%	13%	18%	25%
Feel worse (1-4)	65%	67%	75%	66%	60%

WHAT SHAPES ECONOMIC SENTIMENT					
	Gender		Age Group		
Don't know	2%	3%	2%	2%	3%
Poverty decreases	Men (n=519)	Women (n=495)	18-34 (n=279)	35-54 (n=401)	55+ (n=330)
Feel better (7-10)	59%	58%	67%	59%	51%
Feel neutral (5-6)	18%	18%	18%	21%	17%
Feel worse (1-4)	22%	21%	13%	19%	30%
Don't know	1%	3%	3%	2%	3%
Poverty increases	Men (n=481)	Women (n=505)	18-34 (n=280)	35-54 (n=372)	55+ (n=327)
Feel better (7-10)	12%	9%	12%	8%	12%
Feel neutral (5-6)	16%	13%	12%	15%	14%
Feel worse (1-4)	71%	77%	74%	76%	73%
Don't know	2%	1%	1%	1%	2%
Canadians have less household debt	Men (n=498)	Women (n=503)	18-34 (n=288)	35-54 (n=389)	55+ (n=319)
Feel better (7-10)	56%	55%	65%	56%	48%
Feel neutral (5-6)	19%	18%	19%	18%	18%
Feel worse (1-4)	21%	25%	12%	23%	32%
Don't know	3%	3%	4%	3%	2%
Canadians have more household debt	Men (n=502)	Women (n=497)	18-34 (n=271)	35-54 (n=384)	55+ (n=338)
Feel better (7-10)	12%	11%	9%	11%	13%
Feel neutral (5-6)	18%	17%	17%	16%	20%
Feel worse (1-4)	68%	70%	73%	72%	64%
Don't know	2%	2%	1%	1%	2%
Canadians have more to save for retirement	Men (n=511)	Women (n=492)	18-34 (n=273)	35-54 (n=401)	55+ (n=325)
Feel better (7-10)	56%	55%	65%	59%	45%
Feel neutral (5-6)	19%	19%	16%	16%	26%
Feel worse (1-4)	23%	24%	18%	23%	28%
Don't know	1%	2%	1%	2%	1%
Canadians have less to save for retirement	Men (n=489)	Women (n=508)	18-34 (n=286)	35-54 (n=372)	55+ (n=332)
Feel better (7-10)	17%	13%	14%	13%	17%
Feel neutral (5-6)	19%	17%	19%	16%	19%
Feel worse (1-4)	61%	67%	64%	68%	61%
Don't know	3%	3%	3%	2%	3%
The Canadian dollar increases in value	Men (n=508)	Women (n=499)	18-34 (n=294)	35-54 (n=369)	55+ (n=338)
Feel better (7-10)	50%	58%	65%	51%	48%
Feel neutral (5-6)	34%	27%	26%	32%	33%
Feel worse (1-4)	14%	13%	8%	13%	18%
Don't know	2%	2%	1%	3%	2%
The Canadian dollar decreases in value	Men (n=492)	Women (n=501)	18-34 (n=265)	35-54 (n=404)	55+ (n=319)

WHAT SHAPES ECONOMIC SENTIMENT					
	Gender		Age Group		
Feel better (7-10)	17%	11%	13%	15%	14%
Feel neutral (5-6)	30%	25%	21%	30%	28%
Feel worse (1-4)	51%	61%	61%	54%	56%
Don't know	2%	3%	4%	1%	2%
The economy grows faster than Canada's debt	Men (n=505)	Women (n=493)	18-34 (n=275)	35-54 (n=401)	55+ (n=316)
Feel better (7-10)	55%	48%	60%	54%	42%
Feel neutral (5-6)	22%	28%	23%	25%	28%
Feel worse (1-4)	20%	20%	16%	18%	25%
Don't know	3%	4%	2%	4%	4%
Canada's debt grows faster than the economy	Men (n=495)	Women (n=507)	18-34 (n=284)	35-54 (n=372)	55+ (n=341)
Feel better (7-10)	14%	10%	10%	14%	12%
Feel neutral (5-6)	21%	17%	19%	17%	20%
Feel worse (1-4)	62%	70%	68%	67%	65%
Don't know	3%	3%	3%	3%	2%
Canadian stock market increases in value	Men (n=518)	Women (n=476)	18-34 (n=274)	35-54 (n=372)	55+ (n=344)
Feel better (7-10)	51%	46%	57%	53%	39%
Feel neutral (5-6)	31%	28%	26%	31%	31%
Feel worse (1-4)	10%	13%	10%	9%	16%
Don't know	7%	13%	7%	8%	14%
Canadian stock market decreases in value	Men (n=482)	Women (n=524)	18-34 (n=285)	35-54 (n=401)	55+ (n=313)
Feel better (7-10)	11%	9%	7%	9%	13%
Feel neutral (5-6)	30%	26%	30%	25%	30%
Feel worse (1-4)	51%	56%	57%	57%	47%
Don't know	8%	9%	6%	9%	10%
The deficit decreases	Men (n=509)	Women (n=499)	18-34 (n=286)	35-54 (n=405)	55+ (n=314)
Feel better (7-10)	49%	44%	52%	47%	40%
Feel neutral (5-6)	23%	23%	24%	22%	23%
Feel worse (1-4)	23%	28%	16%	27%	34%
Don't know	5%	5%	8%	4%	4%
The deficit increases	Men (n=491)	Women (n=501)	18-34 (n=273)	35-54 (n=368)	55+ (n=343)
Feel better (7-10)	15%	10%	13%	11%	14%
Feel neutral (5-6)	26%	25%	33%	22%	24%
Feel worse (1-4)	57%	61%	50%	64%	59%
Don't know	2%	4%	4%	3%	3%
Household incomes increase at par with inflation	Men (n=494)	Women (n=511)	18-34 (n=298)	35-54 (n=397)	55+ (n=303)
Feel better (7-10)	40%	51%	49%	46%	45%
Feel neutral (5-6)	30%	21%	29%	27%	20%
Feel worse (1-4)	27%	24%	19%	25%	31%

WHAT SHAPES ECONOMIC SENTIMENT					
	Gender		Age Group		
Don't know	2%	4%	3%	2%	4%
Household incomes don't increase at par with inflation	Men (n=506)	Women (n=489)	18-34 (n=261)	35-54 (n=376)	55+ (n=354)
Feel better (7-10)	16%	13%	13%	14%	16%
Feel neutral (5-6)	17%	21%	20%	20%	17%
Feel worse (1-4)	65%	64%	64%	64%	67%
Don't know	3%	2%	4%	2%	1%
An increase in interest rates	Men (n=496)	Women (n=497)	18-34 (n=266)	35-54 (n=377)	55+ (n=342)
Feel better (7-10)	20%	15%	16%	16%	20%
Feel neutral (5-6)	26%	29%	29%	29%	26%
Feel worse (1-4)	52%	54%	54%	53%	52%
Don't know	2%	2%	2%	2%	2%
A decrease in interest rates	Men (n=504)	Women (n=503)	18-34 (n=293)	35-54 (n=396)	55+ (n=315)
Feel better (7-10)	39%	41%	48%	41%	33%
Feel neutral (5-6)	35%	33%	30%	35%	36%
Feel worse (1-4)	24%	22%	19%	22%	28%
Don't know	2%	4%	3%	2%	3%

Q4: How would each of the following statements make you feel regarding the Canadian economy? Base: All Respondents, n=2,000 (split sample).

In terms of regional analysis, those more likely to feel better about more scenarios live in Atlantic Canada, Ontario, and British Columbia. Those in Manitoba and Saskatchewan, as well as Alberta, feel better about 6 or 7 of the “positive” scenarios presented to them. Quebec residents are the least likely to feel better about any of the scenarios presented.

Scenarios where Quebecers express a notably lower level of positive sentiment include: the deficit decreasing, new jobs being created, poverty decreasing, Canadians having more to save for retirement, and Canadians having less household debt.

The following list summarizes the top economic scenarios per region where residents from that region are more likely to feel better compared to other regions:

- **British Columbia:** new jobs being created (75%), poverty decreasing (75%), the Canadian dollar increasing in value (67%), Canadians having more to save for retirement (64%), the economy growing faster than the debt (64%), Canadians having less household debt (62%), and household income increasing at par with inflation (58%).
- **Ontario:** new jobs being created (69%), unemployment rate decreasing (66%), Canadians having less household debt (63%), poverty decreasing (62%), and Canadians having more to save for retirement (61%).
- **Atlantic Canada:** new jobs being created (65%), poverty decreasing (61%), the Canadian dollar increasing in value (61%), Canadians having less household debt (60%), and the economy growing faster than Canada's debt (58%).

- **Manitoba/Saskatchewan:** new jobs being created (70%), poverty decreasing (61%), Canadians having more to save for retirement (57%), Canadians having less household debt (56%), and the Canadian stock market increasing in value (53%).
- **Alberta:** new jobs being created (70%), poverty decreasing (64%), Canadians having more to save for retirement (61%), Canadians having less household debt (60%), and the deficit decreasing (58%).

WHAT SHAPES ECONOMIC SENTIMENT						
Region						
	ATL (n=166)	QC (n=219)	ON (n=273)	MB/SK (n=96)	AB (n=99)	BC (n=155)
New jobs are created						
Feel better (7-10)	65%	51%	69%	70%	70%	75%
Feel neutral (5-6)	17%	25%	16%	16%	18%	15%
Feel worse (1-4)	18%	20%	14%	12%	12%	9%
Don't know	1%	4%	1%	2%	-	2%
Canadian companies lay off employees	ATL (n=184)	QC (n=181)	ON (n=277)	MB/SK (n=104)	AB (n=101)	BC (n=145)
Feel better (7-10)	9%	12%	8%	11%	3%	8%
Feel neutral (5-6)	15%	33%	15%	15%	22%	15%
Feel worse (1-4)	74%	52%	75%	74%	76%	77%
Don't know	2%	4%	3%	1%	-	-
The unemployment rate decreases	ATL (n=151)	QC (n=174)	ON (n=313)	MB/SK (n=103)	AB (n=100)	BC (n=162)
Feel better (7-10)	62%	57%	66%	53%	59%	70%
Feel neutral (5-6)	18%	26%	16%	25%	26%	12%
Feel worse (1-4)	19%	16%	15%	21%	14%	17%
Don't know	1%	-	2%	1%	1%	2%
The unemployment rate increases	ATL (n=199)	QC (n=226)	ON (n=237)	MB/SK (n=97)	AB (n=100)	BC (n=138)
Feel better (7-10)	12%	17%	11%	14%	7%	10%
Feel neutral (5-6)	17%	29%	15%	25%	12%	11%
Feel worse (1-4)	70%	49%	72%	60%	79%	77%
Don't know	1%	5%	2%	1%	2%	1%
Poverty decreases	ATL (n=170)	QC (n=216)	ON (n=270)	MB/SK (n=90)	AB (n=110)	BC (n=158)
Feel better (7-10)	61%	40%	62%	61%	64%	75%
Feel neutral (5-6)	17%	26%	14%	20%	21%	14%
Feel worse (1-4)	21%	31%	22%	19%	13%	9%
Don't know	1%	3%	3%	-	2%	2%
Poverty increases	ATL (n=180)	QC (n=184)	ON (n=280)	MB/SK (n=110)	AB (n=90)	BC (n=142)
Feel better (7-10)	10%	15%	10%	7%	9%	6%
Feel neutral (5-6)	11%	21%	12%	15%	15%	11%
Feel worse (1-4)	77%	62%	76%	77%	75%	82%

WHAT SHAPES ECONOMIC SENTIMENT						
Region						
	ATL	QC	ON	MB/SK	AB	BC
Don't know	2%	2%	2%	1%	-	-
Canadians have less household debt	ATL (n=162)	QC (n=231)	ON (n=253)	MB/SK (n=111)	AB (n=94)	BC (n=150)
Feel better (7-10)	60%	39%	63%	56%	60%	62%
Feel neutral (5-6)	14%	24%	14%	18%	16%	21%
Feel worse (1-4)	25%	31%	20%	23%	24%	16%
Don't know	1%	6%	3%	3%	-	1%
Canadians have more household debt	ATL (n=188)	QC (n=169)	ON (n=297)	MB/SK (n=89)	AB (n=106)	BC (n=150)
Feel better (7-10)	7%	18%	10%	11%	11%	9%
Feel neutral (5-6)	15%	22%	17%	22%	16%	13%
Feel worse (1-4)	77%	59%	71%	66%	71%	77%
Don't know	<1%	2%	2%	1%	3%	1%
Canadians have more to save for retirement	ATL (n=165)	QC (n=188)	ON (n=270)	MB/SK (n=106)	AB (n=116)	BC (n=158)
Feel better (7-10)	57%	38%	61%	57%	61%	64%
Feel neutral (5-6)	19%	27%	17%	16%	16%	15%
Feel worse (1-4)	21%	31%	21%	25%	23%	19%
Don't know	4%	3%	1%	1%	-	2%
Canadians have less to save for retirement	ATL (n=185)	QC (n=212)	ON (n=280)	MB/SK (n=94)	AB (n=84)	BC (n=142)
Feel better (7-10)	10%	17%	15%	15%	13%	13%
Feel neutral (5-6)	13%	23%	19%	21%	18%	10%
Feel worse (1-4)	74%	56%	64%	63%	69%	72%
Don't know	3%	5%	2%	1%	-	4%
The Canadian dollar increases in value	ATL (n=190)	QC (n=177)	ON (n=274)	MB/SK (n=94)	AB (n=121)	BC (n=151)
Feel better (7-10)	61%	43%	55%	54%	52%	67%
Feel neutral (5-6)	21%	38%	31%	35%	32%	21%
Feel worse (1-4)	16%	15%	13%	11%	14%	10%
Don't know	1%	4%	2%	1%	2%	1%
The Canadian dollar decreases in value	ATL (n=160)	QC (n=223)	ON (n=276)	MB/SK (n=106)	AB (n=79)	BC (n=149)
Feel better (7-10)	10%	16%	15%	13%	12%	12%
Feel neutral (5-6)	28%	33%	24%	26%	22%	28%
Feel worse (1-4)	59%	48%	59%	58%	67%	56%
Don't know	2%	3%	2%	2%	-	4%
The economy grows faster than Canada's debt	ATL (n=172)	QC (n=189)	ON (n=283)	MB/SK (n=93)	AB (n=99)	BC (n=162)
Feel better (7-10)	58%	36%	55%	48%	52%	64%

WHAT SHAPES ECONOMIC SENTIMENT						
Region						
	ATL	QC	ON	MB/SK	AB	BC
Feel neutral (5-6)	22%	32%	23%	26%	27%	20%
Feel worse (1-4)	20%	25%	19%	22%	19%	14%
Don't know	1%	7%	3%	4%	3%	1%
Canada's debt grows faster than the economy	ATL (n=178)	QC (n=211)	ON (n=267)	MB/SK (n=107)	AB (n=101)	BC (n=138)
Feel better (7-10)	11%	17%	11%	15%	11%	6%
Feel neutral (5-6)	13%	20%	18%	19%	18%	21%
Feel worse (1-4)	74%	60%	67%	63%	71%	69%
Don't know	1%	3%	3%	3%	-	5%
Canadian stock market increases in value	ATL (n=164)	QC (n=198)	ON (n=271)	MB/SK (n=107)	AB (n=105)	BC (n=149)
Feel better (7-10)	50%	37%	55%	53%	44%	52%
Feel neutral (5-6)	33%	30%	24%	29%	42%	30%
Feel worse (1-4)	14%	12%	13%	8%	11%	11%
Don't know	3%	21%	8%	10%	3%	7%
Canadian stock market decreases in value	ATL (n=186)	QC (n=202)	ON (n=279)	MB/SK (n=93)	AB (n=95)	BC (n=151)
Feel better (7-10)	13%	14%	10%	7%	4%	7%
Feel neutral (5-6)	19%	39%	27%	32%	23%	18%
Feel worse (1-4)	62%	32%	56%	54%	69%	71%
Don't know	6%	16%	7%	7%	4%	4%
The deficit decreases	ATL (n=170)	QC (n=212)	ON (n=258)	MB/SK (n=109)	AB (n=111)	BC (n=148)
Feel better (7-10)	52%	30%	50%	47%	58%	53%
Feel neutral (5-6)	22%	27%	22%	25%	18%	23%
Feel worse (1-4)	21%	38%	23%	23%	22%	17%
Don't know	5%	5%	6%	4%	2%	6%
The deficit increases	ATL (n=180)	QC (n=188)	ON (n=292)	MB/SK (n=91)	AB (n=89)	BC (n=152)
Feel better (7-10)	12%	17%	12%	11%	6%	11%
Feel neutral (5-6)	25%	26%	25%	27%	24%	27%
Feel worse (1-4)	59%	52%	59%	59%	68%	62%
Don't know	4%	5%	3%	3%	2%	1%
Household incomes increase at par with inflation	ATL (n=182)	QC (n=192)	ON (n=276)	MB/SK (n=108)	AB (n=99)	BC (n=148)
Feel better (7-10)	55%	34%	48%	50%	46%	58%
Feel neutral (5-6)	23%	24%	27%	28%	26%	20%
Feel worse (1-4)	18%	38%	22%	20%	26%	19%
Don't know	4%	4%	3%	2%	2%	3%

WHAT SHAPES ECONOMIC SENTIMENT						
Region						
	ATL (n=168)	QC (n=208)	ON (n=274)	MB/SK (n=92)	AB (n=101)	BC (n=152)
Household incomes don't increase at par with inflation						
Feel better (7-10)	14%	14%	17%	8%	12%	12%
Feel neutral (5-6)	19%	17%	19%	23%	23%	16%
Feel worse (1-4)	64%	67%	62%	67%	64%	70%
Don't know	2%	2%	3%	1%	2%	2%
A decrease in interest rates	ATL (n=187)	QC (n=217)	ON (n=256)	MB/SK (n=92)	AB (n=102)	BC (n=153)
Feel better (7-10)	50%	37%	44%	32%	39%	37%
Feel neutral (5-6)	29%	35%	29%	40%	40%	40%
Feel worse (1-4)	19%	25%	26%	26%	17%	19%
Don't know	2%	3%	2%	2%	3%	4%
An increase in interest rates	ATL (n=163)	QC (n=183)	ON (n=294)	MB/SK (n=108)	AB (n=98)	BC (n=147)
Feel better (7-10)	16%	22%	17%	17%	13%	15%
Feel neutral (5-6)	22%	24%	30%	26%	28%	28%
Feel worse (1-4)	60%	51%	51%	55%	56%	56%
Don't know	2%	3%	2%	2%	3%	1%

Q4: How would each of the following statements make you feel regarding the Canadian economy? Base: All Respondents, n=2,000 (split sample).

Economic Expectations

Respondents were then asked how they expect various economies to perform over the next 6 months, including their own personal financial situation. Generally, respondents are optimistic when it comes to the domestic economy and their personal financial situation, but they are more concerned with the U.S. and the global economy. Nearly two fifths of Canadians say they expect the Canadian economy to improve (38%), 42% expect the status quo while 18% expect it will worsen over the next 6 months. One third of respondents feel their personal financial situation will improve (33%) whereas 9% expect it to worsen. A similar proportion (31%) are optimistic about their province's or territory's economy whereas 23% believe it will worsen. Roughly one quarter believe the stock market (26%), the U.S. economy (26%) and the global economy (23%) will improve however pessimism is more common when it comes to the U.S. economy (42%) and the global economy (33%).



Q5: Based on your general impressions, do you expect each of the following to improve, worsen or stay the same in the next six months? Base: All Respondents, n=2,000.

Men are more optimistic than women on most of these economic dimensions. Those who are 18 to 34 years old are more likely to feel positive about the Canadian economy (42%), their personal financial situation (52%), their province's economy (35%), and the global economy (30%) in the next 6 months. Those 35 to 54 are also more likely feel their personal financial situation will improve in the next 6 months (35%), compared to older respondents (17%).

ECONOMIC EXPECTATIONS – NEXT 6 MONTHS					
	Gender		Age Group		
	Men (n=1,000)	Women (n=1,000)	18-34 (n=559)	35-54 (n=773)	55+ (n=657)
Canada's economy					
Improve	42%	35%	42%	35%	39%
Stay the same	40%	43%	39%	45%	41%
Worsen	17%	20%	18%	19%	18%
Don't know	1%	2%	1%	1%	2%
Your personal financial situation					
Improve	37%	29%	52%	35%	17%
Stay the same	53%	58%	41%	54%	69%
Worsen	8%	10%	6%	10%	10%
Don't know	2%	3%	1%	1%	4%
Your province's/territory's economy					
Improve	31%	30%	35%	28%	30%
Stay the same	44%	45%	46%	45%	43%
Worsen	24%	22%	16%	26%	25%
Don't know	1%	3%	2%	2%	2%
The U.S. economy					
Improve	31%	21%	27%	24%	27%
Stay the same	31%	23%	26%	26%	28%
Worsen	34%	49%	42%	46%	38%
Don't know	3%	7%	4%	4%	8%
The Canadian stock market					
Improve	29%	23%	27%	24%	27%
Stay the same	43%	45%	46%	44%	42%
Worsen	19%	21%	17%	22%	20%
Don't know	9%	11%	9%	10%	11%
The global economy					
Improve	27%	19%	30%	19%	21%
Stay the same	39%	40%	37%	42%	40%
Worsen	32%	35%	30%	35%	34%
Don't know	3%	6%	3%	4%	6%

Q5: Based on your general impressions, do you expect each of the following to improve, worsen or stay the same in the next six months? Base: All Respondents, n=2,000.

Economic expectations by region show residents from Atlantic Canada are the least likely to feel their personal financial situation will improve (24%), or that their province's or territory's economy will improve (17%). Alberta residents are the most optimistic regarding the U.S. and the global economy.

ECONOMIC EXPECTATIONS – NEXT 6 MONTHS						
	Region					
	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK (n=200)	AB (n=200)	BC (n=300)
Canada's economy						
Improve	34%	39%	39%	35%	40%	36%
Stay the same	45%	46%	41%	44%	34%	42%
Worsen	19%	14%	19%	20%	24%	20%
Don't know	2%	1%	2%	1%	2%	1%
Your personal financial situation						
Improve	24%	31%	34%	34%	38%	35%
Stay the same	63%	60%	54%	55%	47%	54%
Worsen	11%	5%	10%	10%	13%	9%
Don't know	2%	4%	2%	1%	1%	2%
Your province's/territory's economy						
Improve	17%	33%	27%	34%	43%	31%
Stay the same	53%	49%	44%	42%	31%	43%
Worsen	29%	16%	27%	22%	24%	23%
Don't know	2%	2%	2%	2%	1%	3%
The U.S. economy						
Improve	23%	28%	26%	23%	31%	22%
Stay the same	28%	25%	25%	24%	34%	29%
Worsen	40%	43%	44%	45%	29%	42%
Don't know	9%	4%	5%	8%	6%	6%
The Canadian stock market						
Improve	21%	31%	24%	24%	26%	25%
Stay the same	46%	35%	47%	47%	44%	46%
Worsen	22%	20%	19%	19%	20%	22%
Don't know	11%	14%	9%	10%	10%	7%
The global economy						
Improve	20%	24%	22%	20%	27%	19%
Stay the same	42%	37%	40%	35%	42%	41%
Worsen	33%	34%	33%	39%	25%	37%
Don't know	5%	5%	4%	6%	6%	3%

Q5: Based on your general impressions, do you expect each of the following to improve, worsen or stay the same in the next six months? Base: All Respondents, n=2,000.

Housing

Home Ownership and Mortgage

Nearly two thirds of Canadians are home owners (63%), and nearly two thirds of home owners say they have a mortgage (63%). When recalculated over the base of all respondents, we can estimate that 40% of all households have a mortgage.

Women (66%) and respondents at least 35 years of age (75%) are more likely to say they are home owners, compared to their counterparts (61% men, 34% under 35 years old). The younger respondents are, the more likely they are to have a mortgage. Home owners are more likely to be in Atlantic Canada (69%), Manitoba or Saskatchewan (75%), and Alberta (69%), and homeowners in Quebec are the most likely to have a mortgage (72%).

HOME OWNERSHIP AND MORTGAGE						
	Total	Gender		Age Group		
Are you a home owner	Total (n=2,000)	Men (n=1,000)	Women (n=1,000)	18-34 (n=559)	35-54 (n=773)	55+ (n=657)
Yes	67%	61%	66%	34%	74%	76%
No	37%	38%	34%	65%	26%	23%
Do you have a mortgage on your home? (among home owners)	Total (n=1,309)	Men (n=627)	Women (n=682)	18-34 (n=195)	35-54 (n=578)	55+ (n=531)
Yes	67%	62%	64%	90%	81%	36%
No	37%	38%	36%	10%	19%	63%

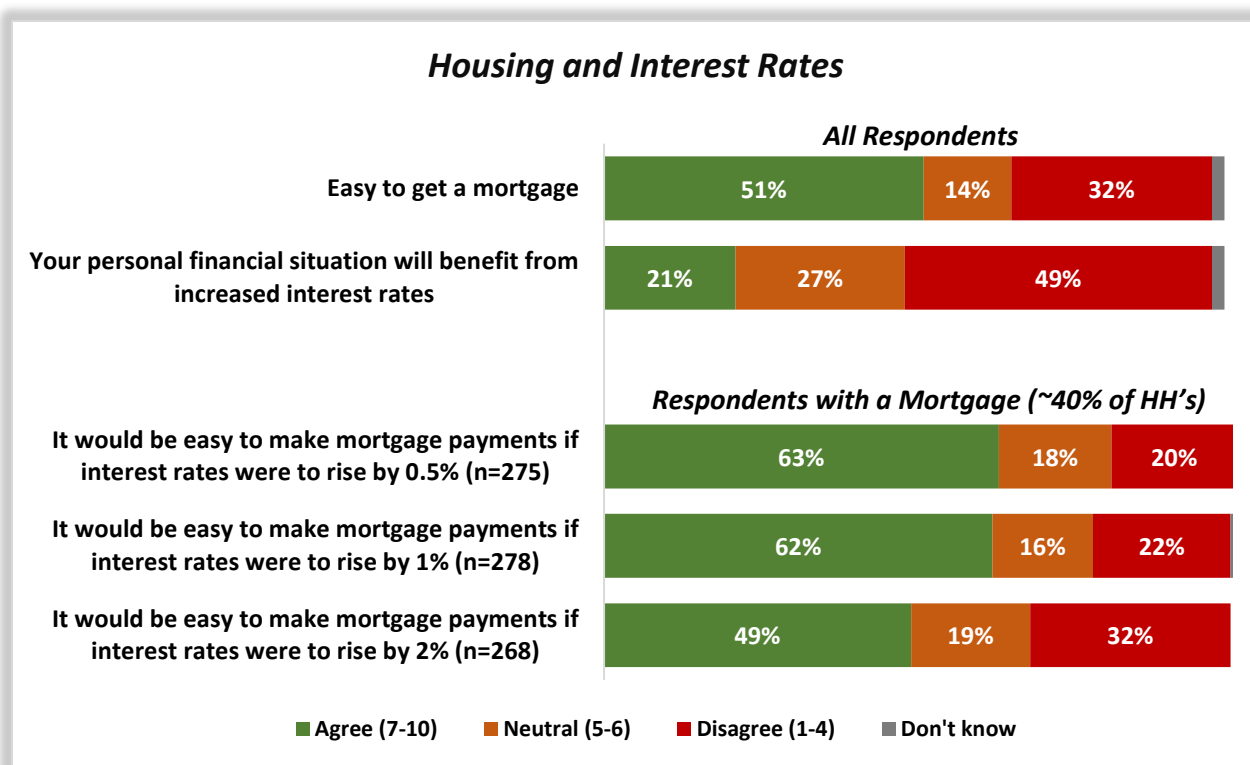
HOME OWNERSHIP AND MORTGAGE						
	Region					
Are you a home owner?	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK (n=200)	AB (n=200)	BC (n=300)
Yes	69%	60%	61%	75%	69%	62%
No	31%	38%	39%	24%	30%	38%
Do you have a mortgage on your home? (among home owners)	ATL (n=245)	QC (n=233)	ON (n=340)	MB/SK (n=155)	AB (n=147)	BC (n=189)
Yes	56%	72%	60%	60%	64%	60%
No	42%	28%	39%	39%	35%	39%

Q6: Are you a home owner? Base: All Respondents, n=2,000. Q7: Do you have a mortgage on your home? Base: Home owners, n=1,309.

Housing and Interest Rates

Survey participants were presented with a series of statements related to mortgage and interest rates to rate their level of agreement with each of them. Half of participants (51%) agree it would be easy for them to get a mortgage today, while nearly one third disagree with this statement (32%). Additionally, half of participants (49%) disagree that their personal financial situation will benefit from increased interest rates, while 21% agree with this, and 27% feel neutral about it.

Respondents with a mortgage were divided into three samples, each presented with a different interest rate statement. More than three in five mortgage owners (63%) agree it would be easy to make mortgage payments if interest rates were to rise by 0.5%. Similarly, 62% agree with the scenario if interest rates were to rise 1%. The 2% interest rate increase breaks this pattern, as only 49% agree this increase would make mortgage payments easy to cover, while 32% outright disagree.



Q8: Using a scale from 1 to 10, where 1 is strongly disagree and 10 is strongly agree, to what extent do you agree or disagree with the following statements? Base: All Respondents, n=2,000 (split sample).

Respondents who are 18 to 34 years old are the least likely to agree that nowadays it is easy to get a home mortgage (36% vs. 57%), and therefore the most likely to disagree (43% vs. 28%). Those under 55 years old are also more likely to disagree that their personal financial situation will benefit from the recent increase in interest rates (54% vs. 41%). Men are more likely to agree that an increase in interest rates by

half percent or 2% will still allow them to easily to pay their mortgage (70% and 57% respectively), compared to women (57% and 43% respectively).

HOUSING AND INTEREST RATES					
	Gender		Age Group		
Easy to get a home mortgage today	Men (n=1,000)	Women (n=1,000)	18-34 (n=559)	35-54 (n=773)	55+ (n=657)
Agree (7-10)	50%	52%	36%	58%	56%
Neutral (5-6)	16%	13%	18%	13%	12%
Disagree (1-4)	32%	33%	43%	28%	28%
Don't know	2%	3%	3%	1%	4%
Your personal financial situation will benefit from the recent increase in interest rates	Men (n=1,000)	Women (n=1,000)	18-34 (n=559)	35-54 (n=773)	55+ (n=657)
Agree (7-10)	22%	20%	15%	18%	29%
Neutral (5-6)	29%	26%	32%	24%	27%
Disagree (1-4)	47%	51%	51%	56%	41%
Don't know	2%	3%	2%	2%	3%
(Caution: Results for certain age groups below are based on small sample sizes)					
Easy for you to keep making mortgage payments if interest rates were to rise by 0.5% tomorrow	Men (n=123)	Women (n=152)	18-34 (n=53)	35-54 (n=166)	55+ (n=56)
Agree (7-10)	70%	57%	60%	65%	59%
Neutral (5-6)	12%	22%	18%	16%	21%
Disagree (1-4)	18%	21%	22%	18%	20%
Easy for you to keep making mortgage payments if interest rates were to rise by 1% tomorrow	Men (n=141)	Women (n=137)	18-34 (n=65)	35-54 (n=149)	55+ (n=64)
Agree (7-10)	63%	60%	62%	61%	64%
Neutral (5-6)	13%	18%	19%	15%	15%
Disagree (1-4)	22%	22%	19%	23%	22%
Easy for you to keep making mortgage payments if interest rates were to rise by 2% tomorrow	Men (n=124)	Women (n=144)	18-34 (n=57)	35-54 (n=153)	55+ (n=58)
Agree (7-10)	57%	43%	51%	50%	47%
Neutral (5-6)	18%	20%	23%	16%	23%
Disagree (1-4)	25%	37%	26%	34%	30%

Q8: Using a scale from 1 to 10, where 1 is strongly disagree and 10 is strongly agree, to what extent do you agree or disagree with the following statements? Base: All Respondents, n=2,000 (split sample).

British Columbia and Ontario residents are the least likely to agree that it is easy to get a home mortgage today (43% and 45% respectively), compared to other provinces (58%). Residents of Quebec are the most likely to agree that their personal financial situation will benefit from the recent increase in interest rates (26%), when compared to Ontario (20%), British Columbia (17%), and Alberta (16%) residents; and are the most likely to agree that it would be easy to continue making mortgage payments if interest rates were to rise 2% tomorrow (60% vs. 41% in Ontario and 39% in Atlantic Canada).

HOUSING AND INTEREST RATES						
	Region					
Easy to get a home mortgage today	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK (n=200)	AB (n=200)	BC (n=300)
Agree (7-10)	52%	62%	45%	55%	55%	43%
Neutral (5-6)	13%	10%	17%	14%	16%	14%
Disagree (1-4)	32%	26%	36%	29%	28%	41%
Don't know	3%	2%	3%	2%	2%	2%
Your personal financial situation will benefit from the recent increase in interest rates	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK (n=200)	AB (n=200)	BC (n=300)
Agree (7-10)	21%	26%	20%	23%	16%	17%
Neutral (5-6)	27%	25%	27%	30%	33%	27%
Disagree (1-4)	50%	46%	51%	44%	50%	54%
Don't know	2%	3%	2%	2%	2%	2%
(Caution: Regional results below are based on small sample sizes)						
Easy for you to keep making mortgage payments if interest rates were to rise by 0.5% tomorrow	ATL (n=48)	QC (n=67)	ON (n=68)	MB/SK (n=25)	AB (n=29)	BC (n=38)
Agree (7-10)	66%	69%	64%	47%	58%	55%
Neutral (5-6)	23%	17%	12%	16%	26%	23%
Disagree (1-4)	11%	13%	24%	36%	16%	20%
Easy for you to keep making mortgage payments if interest rates were to rise by 1% tomorrow	ATL (n=44)	QC (n=62)	ON (n=73)	MB/SK (n=26)	AB (n=28)	BC (n=45)
Agree (7-10)	54%	69%	62%	62%	55%	54%
Neutral (5-6)	19%	12%	16%	27%	9%	20%
Disagree (1-4)	26%	16%	22%	11%	35%	23%
Easy for you to keep making mortgage payments if interest rates were to rise by 2% tomorrow	ATL (n=50)	QC (n=58)	ON (n=62)	MB/SK (n=32)	AB (n=31)	BC (n=35)
Agree (7-10)	39%	60%	41%	52%	47%	57%
Neutral (5-6)	18%	20%	20%	17%	17%	20%
Disagree (1-4)	43%	20%	39%	32%	35%	23%

Q8: Using a scale from 1 to 10, where 1 is strongly disagree and 10 is strongly agree, to what extent do you agree or disagree with the following statements? Base: All Respondents, n=2,000 (split sample).

The Tax System

Respondents were asked to openly say what they had heard about the Government of Canada's proposed measures to make the tax system fairer. Over half of respondents indicated they have not heard anything in this regard (54%), another 5% did not know or refused to answer the question and 6% said they had heard something but did not know enough to provide an explanation.

Among those who did provide a response, no single issue or theme rises above the rest in a noticeable way. Instead, we see a broad range of topics and perspectives. One in ten believe they have heard something about the Government of Canada wanting to increase taxes, mainly to either small/independent businesses (5%) or to high-income people (4%). Nearly another tenth (8%) say they have heard about measures having an impact on certain groups, mostly referring to small businesses (6%), doctors or the healthcare sector (2%), or farmers (2%).

Less than 6% referred to having heard about closing loopholes (5%), changing the tax rates (4%), helping in lowering taxes (3%), changes to income splitting (2%), or changes that will be bad for the economy (2%). Without specifying to any changes in particular, 8% of respondents simply indicated they disagreed with the government's tax reforms, and 4% agreed with the measures they had heard about.

WHAT HAS BEEN HEARD ABOUT MAKING THE TAX SYTEM FAIRER

Increasing taxes (Net)	10%	Changing tax rates (unspecified)	4%
<i>Increasing taxes on small / independent businesses</i>	5%	I agree with the changes (unspecified)	4%
<i>Increasing taxes on high-income people</i>	4%	Helping/lowering taxes (Net)	3%
<i>Increasing taxes (general)</i>	2%	<i>Helping / lower taxes for the middle class</i>	2%
<i>Increasing taxes on the middle-class</i>	<1%	<i>Helping / lower taxes (general)</i>	1%
I don't agree with the changes	8%	<i>Helping / lower taxes for small businesses</i>	<1%
Impact on individual groups (Net)	8%	Have heard complaints / negative reviews	2%
<i>Impact on small businesses (unspecified)</i>	6%	Changes to income-splitting	2%
<i>Impact on doctors / healthcare mentions</i>	2%	Changes will be bad for the economy / recession	2%
<i>Impact on farmers</i>	2%	Negative government mentions (specified)	1%
<i>Impact on self-employed</i>	<1%	Other	4%
<i>Impact on landlords</i>	<1%	Have not heard anything	54%
Have heard about it (unspecified)	6%	Don't know/Refused	5%
Closing loopholes	5%		

Q9: What, if anything, have you heard about the Government of Canada's proposed measures to make the tax system fairer? Base: All Respondents, n=2,000.

Respondents under 54 years old are more likely to not have heard about any measures proposed by the Government of Canada to make the tax system fairer compared to older respondents (59% vs. 44%). Men (10%) and respondents at least 35 years old (~10%) are more likely to disagree with the changes they have heard about, compared to women (7%) and respondents under 35 (3%).

WHAT HAS BEEN HEARD ABOUT MAKING THE TAX SYSTEM FAIRER					
	Gender		Age Group		
	Men (n=1,000)	Women (n=1,000)	18-34 (n=559)	35-54 (n=773)	55+ (n=657)
Increasing taxes (Net)	10%	10%	10%	10%	11%
<i>Increasing taxes on small / independent businesses</i>	5%	4%	5%	5%	4%
<i>Increasing taxes on high-income people</i>	3%	5%	3%	4%	5%
<i>Increasing taxes (general)</i>	2%	2%	3%	2%	2%
<i>Increasing taxes on the middle-class</i>	<1%	1%	<1%	1%	<1%
I don't agree with the changes	10%	7%	3%	9%	12%
Impact on individual groups (Net)	9%	7%	6%	9%	8%
<i>Impact on small businesses (unspecified)</i>	7%	5%	5%	6%	6%
<i>Impact on doctors / healthcare mentions</i>	2%	2%	1%	3%	2%
<i>Impact on farmers</i>	1%	2%	1%	1%	2%
<i>Impact on self-employed</i>	<1%	1%	1%	1%	<1%
<i>Impact on landlords</i>	-	<1%	-	<1%	-
Have heard about it (unspecified)	6%	7%	4%	6%	8%
Closing loopholes	6%	4%	3%	6%	7%
Changing tax rates (unspecified)	5%	3%	3%	5%	5%
I agree with the changes (unspecified)	4%	4%	2%	3%	7%
Helping/lowering taxes (Net)	3%	3%	2%	3%	3%
<i>Helping / lower taxes for the middle class</i>	2%	2%	1%	2%	2%
<i>Helping / lower taxes (general)</i>	2%	1%	1%	1%	1%
<i>Helping / lower taxes for small businesses</i>	<1%	<1%	<1%	<1%	<1%
Have heard complaints / negative reviews	3%	2%	1%	3%	3%
Changes to income-splitting	2%	2%	1%	3%	2%
Changes will be bad for the economy / recession	2%	2%	1%	2%	2%
Negative government mentions (specified)	2%	1%	<1%	1%	2%
Have not heard anything	52%	56%	66%	54%	44%
Other	3%	4%	2%	3%	5%
Don't know/Refused	5%	5%	6%	4%	5%

Q9: What, if anything, have you heard about the Government of Canada's proposed measures to make the tax system fairer? Base: All Respondents, n=2,000.

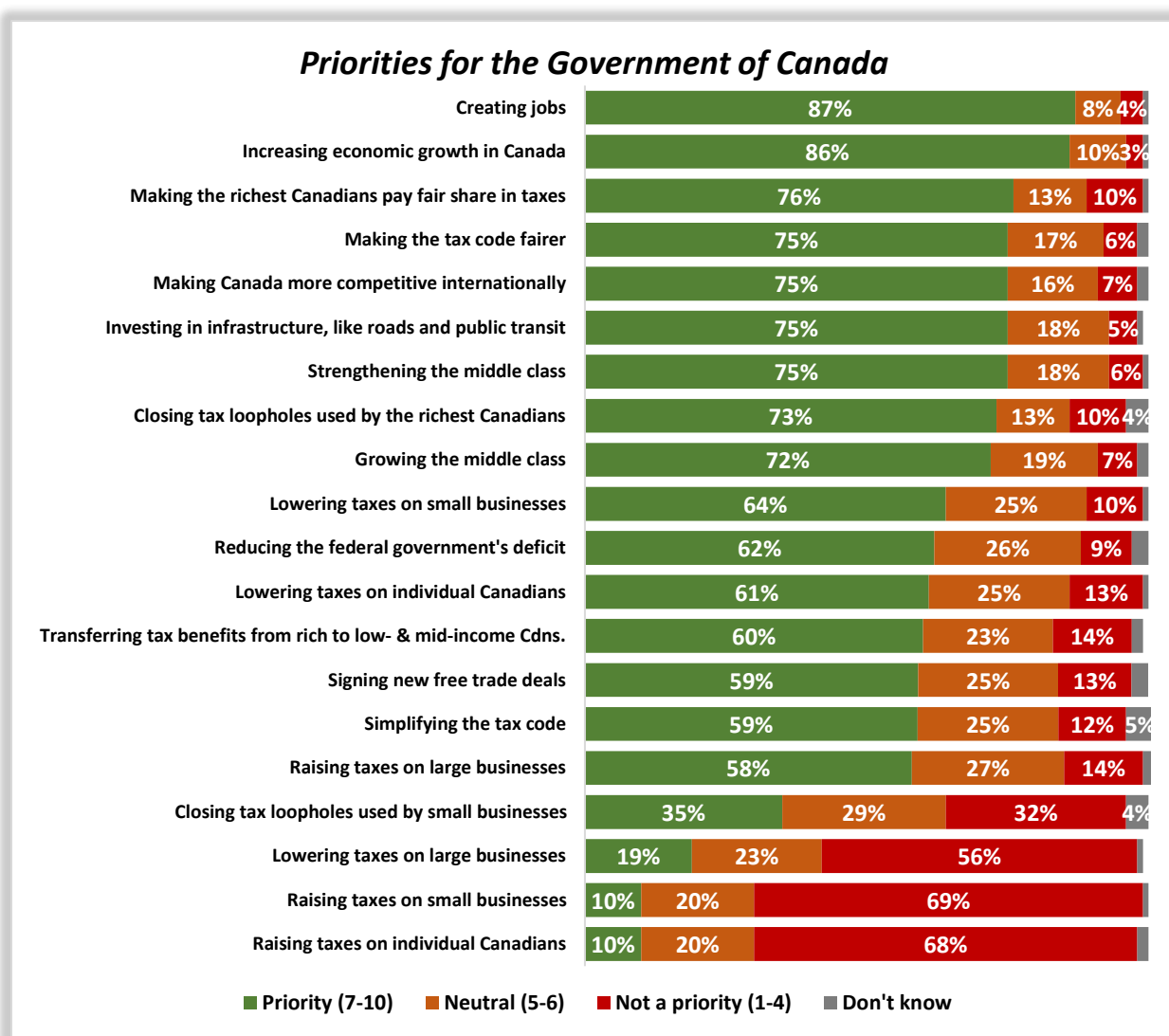
Quebec residents are the least likely to have heard about any measures by the federal government regarding a fairer tax system (72% have not heard anything).

WHAT HAS BEEN HEARD ABOUT MAKING THE TAX SYSTEM FAIRER						
	Region					
	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK (n=200)	AB (n=200)	BC (n=300)
Increasing taxes (Net)	14%	3%	10%	16%	12%	16%
<i>Increasing taxes on small / independent businesses</i>	8%	1%	5%	7%	6%	7%
<i>Increasing taxes on high-income people</i>	4%	2%	4%	4%	3%	8%
<i>Increasing taxes (general)</i>	1%	1%	2%	5%	2%	3%
<i>Increasing taxes on the middle-class</i>	1%	-	<1%	1%	1%	1%
I don't agree with the changes	10%	4%	9%	10%	12%	9%
Impact on individual groups (Net)	12%	3%	8%	9%	13%	9%
<i>Impact on small businesses (unspecified)</i>	8%	2%	6%	5%	11%	7%
<i>Impact on doctors / healthcare mentions</i>	5%	1%	2%	4%	2%	1%
<i>Impact on farmers</i>	1%	-	2%	4%	3%	1%
<i>Impact on self-employed</i>	1%	<1%	<1%	-	<1%	1%
<i>Impact on landlords</i>	-	-	<1%	-	-	-
Have heard about it (unspecified)	6%	3%	7%	7%	8%	8%
Closing loopholes	6%	2%	6%	5%	7%	6%
Changing tax rates (unspecified)	5%	<1%	5%	4%	6%	5%
I agree with the changes (unspecified)	4%	5%	4%	3%	2%	5%
Helping/lowering taxes (Net)	4%	3%	2%	3%	3%	2%
<i>Helping / lower taxes for the middle class</i>	3%	1%	1%	2%	2%	1%
<i>Helping / lower taxes (general)</i>	1%	2%	1%	1%	1%	1%
<i>Helping / lower taxes for small businesses</i>	-	-	<1%	1%	-	-
Have heard complaints / negative reviews	5%	<1%	3%	4%	3%	1%
Changes to income-splitting	2%	1%	3%	1%	3%	3%
Changes will be bad for the economy / recession	3%	<1%	2%	4%	2%	1%
Negative government mentions (specified)	1%	1%	1%	2%	2%	1%
Have not heard anything	50%	72%	49%	45%	48%	47%
Other	3%	4%	4%	5%	3%	3%
Don't know/Refused	3%	5%	6%	7%	4%	6%

Q9: What, if anything, have you heard about the Government of Canada's proposed measures to make the tax system fairer? Base: All Respondents, n=2,000.

Priorities for the Government of Canada

When presented with a list of various initiatives, creating jobs and increasing economic growth were the two that attracted the most support as a possible priority for the Government of Canada. When respondents were asked specifically how much of a priority these two areas should be for the Government of Canada, 87% provided a rating of 7 to 10 (on a 1 to 10 priority scale) when it comes to “creating jobs” and 86% provided this sort of rating for “increasing economic growth in Canada.”



Q10: How much of a priority should each of the following be for the Government of Canada? Base: All Respondents, n=2,000 (split sample).

Other priorities that were rated highly by at least three quarters of respondents include making the richest Canadians pay their fair share in taxes (76%), investing in infrastructure like roads and public transit (75%), strengthening the middle class (75%), making the tax code fairer (75%), and making Canada more competitive internationally (75%). Nearly 3 in 4 rated highly closing tax loopholes used by the richest Canadians (73%), or growing the middle class (72%).

Roughly 6 in 10 respondents see as a priority lowering taxes on small businesses (64%), reducing the federal government's deficit (62%), lowering taxes on individual Canadians (61%), transferring tax benefits from the richest Canadians to low- and middle-income Canadians (60%), simplifying the tax code (59%), signing new free-trade deals (59%), and raising taxes on large businesses (58%).

Suggestions that were supported by a minority of respondents included closing tax loopholes used by small businesses (35%), lowering taxes on large businesses (19%), raising taxes on small businesses (10%), and raising taxes on individual Canadians (10%).

Men are more likely than women to prioritize Canada becoming more competitive internationally (82% vs. 70%), and simplifying the tax code (63% vs. 54%); while women are slightly more likely than men to consider job creation a priority (89% vs. 85%).

Respondents over 55 years of age are more likely than younger respondents to indicate the government priorities should be making the tax code fairer (81%), simplifying the tax code (69%), transferring tax benefits from the richest Canadians to low and middle-class Canadians (67%), reducing the federal government's deficit (66%), and signing new free trade deals (65%).

Those who are 35 to 54 years old are more likely to prioritize making Canada more competitive internationally (80%). Those under 55 years old are more likely to consider increasing economic growth in Canada a priority (89%).

PRIORITIES FOR THE GOVERNMENT OF CANADA					
	Gender		Age Group		
	Men (n=1,000)	Women (n=1,000)	18-34 (n=559)	35-54 (n=773)	55+ (n=657)
Creating jobs					
Priority (7-10)	85%	89%	87%	88%	86%
Neutral (5-6)	9%	7%	9%	8%	7%
Not a priority (1-4)	5%	3%	3%	4%	6%
Don't know	1%	1%	1%	0%	1%
Increase economic growth in Canada					
Priority (7-10)	84%	88%	90%	88%	81%
Neutral (5-6)	10%	9%	8%	9%	12%
Not a priority (1-4)	4%	2%	2%	2%	5%
Don't know	1%	1%	1%	1%	1%

PRIORITIES FOR THE GOVERNMENT OF CANADA					
	Gender		Age Group		
Making the richest Canadians pay their fair share in taxes	Men (n=510)	Women (n=495)	18-34 (n=272)	35-54 (n=387)	55+ (n=340)
Priority (7-10)	74%	78%	74%	73%	79%
Neutral (5-6)	14%	12%	18%	14%	8%
Not a priority (1-4)	11%	9%	6%	11%	11%
Don't know	1%	1%	1%	2%	1%
Making Canada more competitive internationally	Men (n=479)	Women (n=509)	18-34 (n=282)	35-54 (n=365)	55+ (n=336)
Priority (7-10)	82%	70%	71%	80%	75%
Neutral (5-6)	13%	19%	18%	13%	16%
Not a priority (1-4)	5%	8%	9%	6%	6%
Don't know	1%	3%	2%	1%	2%
Investing in infrastructure, like roads and public transit	Men (n=1,000)	Women (n=1,000)	18-34 (n=559)	35-54 (n=773)	55+ (n=657)
Priority (7-10)	76%	74%	74%	74%	78%
Neutral (5-6)	18%	19%	20%	20%	16%
Not a priority (1-4)	5%	6%	6%	5%	5%
Don't know	1%	1%	1%	1%	1%
Strengthening the middle class	Men (n=509)	Women (n=488)	18-34 (n=282)	35-54 (n=385)	55+ (n=321)
Priority (7-10)	75%	74%	74%	72%	79%
Neutral (5-6)	17%	19%	19%	18%	16%
Not a priority (1-4)	6%	6%	6%	8%	4%
Don't know	2%	1%	1%	1%	2%
Making the tax code fairer	Men (n=501)	Women (n=501)	18-34 (n=284)	35-54 (n=392)	55+ (n=323)
Priority (7-10)	76%	74%	74%	70%	81%
Neutral (5-6)	17%	17%	20%	19%	13%
Not a priority (1-4)	6%	5%	3%	8%	5%
Don't know	2%	3%	4%	2%	1%
Closing tax loopholes used by richest Canadians	Men (n=490)	Women (n=510)	18-34 (n=263)	35-54 (n=412)	55+ (n=320)
Priority (7-10)	72%	74%	71%	72%	78%
Neutral (5-6)	13%	13%	17%	13%	9%
Not a priority (1-4)	12%	9%	7%	11%	12%
Don't know	3%	4%	5%	4%	2%
Growing the middle class	Men (n=491)	Women (n=512)	18-34 (n=277)	35-54 (n=338)	55+ (n=336)
Priority (7-10)	70%	74%	75%	73%	70%
Neutral (5-6)	20%	18%	20%	19%	18%
Not a priority (1-4)	8%	6%	4%	7%	8%
Don't know	2%	2%	1%	1%	4%
Lowering taxes on small businesses	Men (n=506)	Women (n=498)	18-34 (n=279)	35-54 (n=407)	55+ (n=313)
Priority (7-10)	66%	62%	63%	66%	62%

PRIORITIES FOR THE GOVERNMENT OF CANADA					
	Gender		Age Group		
Neutral (5-6)	23%	27%	27%	23%	26%
Not a priority (1-4)	9%	11%	8%	11%	10%
Don't know	1%	1%	1%	1%	1%
Reducing the federal government's deficit	Men (n=1,000)	Women (n=1,000)	18-34 (n=559)	35-54 (n=773)	55+ (n=657)
Priority (7-10)	63%	60%	57%	61%	66%
Neutral (5-6)	25%	28%	28%	27%	25%
Not a priority (1-4)	9%	9%	11%	10%	8%
Don't know	3%	2%	4%	2%	2%
Lowering taxes on individual Canadians	Men (n=505)	Women (n=491)	18-34 (n=302)	35-54 (n=366)	55+ (n=323)
Priority (7-10)	63%	60%	60%	61%	63%
Neutral (5-6)	22%	27%	25%	26%	23%
Not a priority (1-4)	14%	12%	14%	13%	12%
Don't know	1%	1%	1%	0%	1%
Transferring tax benefits from the richest Canadians to low and middle-class income Canadians	Men (n=490)	Women (n=505)	18-34 (n=287)	35-54 (n=386)	55+ (n=317)
Priority (7-10)	58%	62%	58%	56%	67%
Neutral (5-6)	23%	23%	27%	26%	16%
Not a priority (1-4)	17%	12%	12%	16%	15%
Don't know	2%	3%	3%	2%	3%
Simplifying the tax code	Men (n=499)	Women (n=499)	18-34 (n=275)	35-54 (n=381)	55+ (n=334)
Priority (7-10)	63%	54%	51%	54%	69%
Neutral (5-6)	21%	29%	31%	27%	18%
Not a priority (1-4)	11%	12%	12%	14%	9%
Don't know	4%	5%	6%	5%	4%
Signing new free trade deals	Men (n=1,000)	Women (n=1,000)	18-34 (n=559)	35-54 (n=773)	55+ (n=657)
Priority (7-10)	60%	59%	53%	58%	65%
Neutral (5-6)	24%	25%	30%	26%	20%
Not a priority (1-4)	14%	12%	13%	13%	13%
Don't know	2%	4%	4%	3%	2%
Raising taxes on large businesses	Men (n=497)	Women (n=503)	18-34 (n=267)	35-54 (n=398)	55+ (n=338)
Priority (7-10)	55%	60%	57%	59%	57%
Neutral (5-6)	27%	27%	32%	25%	25%
Not a priority (1-4)	17%	11%	9%	16%	16%
Don't know	1%	2%	2%	-	3%
Closing tax loopholes used by small businesses	Men (n=510)	Women (n=490)	18-34 (n=296)	35-54 (n=361)	55+ (n=337)
Priority (7-10)	37%	33%	32%	33%	39%
Neutral (5-6)	25%	33%	35%	28%	25%
Not a priority (1-4)	35%	29%	30%	35%	31%

PRIORITIES FOR THE GOVERNMENT OF CANADA					
	Gender		Age Group		
Don't know	3%	5%	3%	4%	4%
Lowering taxes on large businesses	Men (n=503)	Women (n=497)	18-34 (n=292)	35-54 (n=384)	55+ (n=319)
Priority (7-10)	17%	22%	15%	21%	21%
Neutral (5-6)	26%	21%	23%	25%	21%
Not a priority (1-4)	57%	56%	62%	52%	57%
Don't know	1%	2%	1%	2%	1%
Raising taxes on small businesses	Men (n=494)	Women (n=502)	18-34 (n=280)	35-54 (n=366)	55+ (n=344)
Priority (7-10)	9%	11%	8%	12%	10%
Neutral (5-6)	21%	19%	17%	20%	22%
Not a priority (1-4)	69%	68%	74%	68%	66%
Don't know	1%	2%	1%	1%	2%
Raising taxes on individual Canadians	Men (n=495)	Women (n=509)	18-34 (n=257)	35-54 (n=407)	55+ (n=334)
Priority (7-10)	10%	10%	10%	9%	10%
Neutral (5-6)	20%	19%	22%	21%	17%
Not a priority (1-4)	67%	69%	68%	68%	69%
Don't know	2%	2%	1%	1%	4%

Q10: How much of a priority should each of the following be for the Government of Canada? Base: All Respondents, n=2,000 (split sample).

Sentiments are stronger in particular regions about the issues on which the Government of Canada should focus. For instance, job creation is considered a priority across the country, but more so in Atlantic Canada (92%), than other regions.

Below is a summary of how respondents from certain regions are more likely to prioritize certain issues compared to respondents in other regions:

- **Atlantic Canada:** Creating jobs (92%), making the richest Canadians pay their fair share in taxes (86%), investing in infrastructure, like roads and public transit (79%), strengthening the middle class (79%), and closing tax loopholes used by richest Canadians (77%).
- **Quebec:** Strengthening the middle class (88%), growing the middle class (80%), investing in infrastructure, like roads and public transit (78%), making the tax code fairer (77%), and raising taxes on large businesses (68%).
- **Ontario:** Closing tax loopholes used by the richest Canadians (79%), making the richest Canadians pay their fair share in taxes (78%), making the tax code fairer (77%), reducing the federal government's deficit (65%), and transferring tax benefits from the richest Canadians to low and middle-class income Canadians (64%).
- **Manitoba/Saskatchewan:** Making the tax code fairer (81%), making richest Canadians pay their fair share in taxes (78%), growing the middle class (75%), and raising taxes on large businesses (53%).
- **Alberta:** Reducing the federal government's deficit (69%). Albertans are the least likely to see as a priority making the tax code fairer (60%), and raising taxes on large businesses (35%).
- **British Columbia:** Making the richest Canadians pay their fair share in taxes (79%), making the tax code fairer (77%), closing tax loopholes used by the richest Canadians (76%), raising taxes on large businesses (59%), and closing tax loopholes used by small businesses (34%).

PRIORITIES FOR THE GOVERNMENT OF CANADA						
	Region					
	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK (n=200)	AB (n=200)	BC (n=300)
Creating jobs						
Priority (7-10)	92%	88%	87%	88%	87%	84%
Neutral (5-6)	4%	6%	8%	9%	10%	11%
Not a priority (1-4)	3%	5%	4%	3%	3%	5%
Don't know	1%	1%	1%	1%	-	1%
Increase economic growth in Canada	ATL (n=176)	QC (n=220)	ON (n=256)	MB/SK (n=108)	AB (n=103)	BC (n=149)
Priority (7-10)	88%	86%	85%	84%	88%	87%
Neutral (5-6)	6%	9%	10%	15%	11%	11%
Not a priority (1-4)	5%	4%	3%	1%	1%	2%
Don't know	1%	1%	2%	-	-	1%
Making the richest Canadians pay their fair share in taxes	ATL (n=186)	QC (n=214)	ON (n=266)	MB/SK (n=94)	AB (n=97)	BC (n=148)
Priority (7-10)	86%	73%	78%	78%	61%	79%
Neutral (5-6)	5%	14%	13%	12%	23%	12%
Not a priority (1-4)	8%	11%	8%	9%	16%	8%
Don't know	1%	2%	1%	1%	-	1%
Making Canada more competitive internationally	ATL (n=174)	QC (n=180)	ON (n=294)	MB/SK (n=92)	AB (n=97)	BC (n=151)
Priority (7-10)	78%	74%	76%	73%	74%	75%
Neutral (5-6)	14%	14%	17%	19%	17%	14%
Not a priority (1-4)	7%	8%	5%	6%	9%	9%
Don't know	1%	4%	1%	2%	-	2%
Investing in infrastructure, like roads and public transit	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK (n=200)	AB (n=200)	BC (n=300)
Priority (7-10)	79%	78%	75%	75%	70%	75%
Neutral (5-6)	17%	17%	18%	18%	24%	19%
Not a priority (1-4)	3%	4%	6%	7%	6%	6%
Don't know	1%	1%	1%	1%	-	-
Strengthening the middle class	ATL (n=190)	QC (n=167)	ON (n=279)	MB/SK (n=96)	AB (n=113)	BC (n=152)
Priority (7-10)	79%	88%	72%	72%	67%	70%
Neutral (5-6)	12%	9%	20%	24%	23%	22%
Not a priority (1-4)	6%	2%	6%	3%	9%	8%
Don't know	4%	1%	2%	1%	2%	1%
Making the tax code fairer	ATL (n=174)	QC (n=199)	ON (n=255)	MB/SK (n=108)	AB (n=112)	BC (n=154)
Priority (7-10)	75%	77%	77%	81%	60%	77%
Neutral (5-6)	16%	18%	15%	14%	27%	13%
Not a priority (1-4)	3%	4%	6%	2%	8%	6%

PRIORITIES FOR THE GOVERNMENT OF CANADA						
	Region					
	5%	1%	2%	3%	4%	3%
Closing tax loopholes used by the richest Canadians	ATL (n=161)	QC (n=219)	ON (n=267)	MB/SK (n=100)	AB (n=96)	BC (n=157)
Priority (7-10)	77%	70%	79%	64%	60%	76%
Neutral (5-6)	11%	11%	11%	20%	19%	13%
Not a priority (1-4)	10%	13%	7%	9%	19%	10%
Don't know	2%	6%	3%	7%	2%	1%
Growing the middle class	ATL (n=160)	QC (n=233)	ON (n=271)	MB/SK (n=104)	AB (n=87)	BC (n=148)
Priority (7-10)	73%	80%	70%	75%	60%	71%
Neutral (5-6)	17%	11%	20%	18%	36%	23%
Not a priority (1-4)	9%	6%	8%	5%	3%	6%
Don't know	1%	3%	3%	2%	1%	1%
Lowering taxes on small businesses	ATL (n=170)	QC (n=202)	ON (n=273)	MB/SK (n=109)	AB (n=101)	BC (n=149)
Priority (7-10)	69%	63%	65%	54%	65%	65%
Neutral (5-6)	22%	24%	25%	30%	25%	27%
Not a priority (1-4)	8%	12%	8%	14%	9%	9%
Don't know	1%	1%	1%	1%	1%	-
Reducing the federal government's deficit	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK (n=200)	AB (n=200)	BC (n=300)
Priority (7-10)	64%	57%	65%	60%	69%	58%
Neutral (5-6)	26%	30%	24%	29%	21%	29%
Not a priority (1-4)	8%	11%	9%	7%	8%	10%
Don't know	3%	3%	2%	4%	2%	3%
Lowering taxes on individual Canadians	ATL (n=176)	QC (n=191)	ON (n=265)	MB/SK (n=105)	AB (n=104)	BC (n=155)
Priority (7-10)	69%	59%	62%	61%	58%	62%
Neutral (5-6)	20%	24%	26%	24%	29%	23%
Not a priority (1-4)	11%	16%	11%	13%	13%	14%
Don't know	1%	1%	1%	2%	-	1%
Transferring tax benefits from the richest Canadians to low and middle-class income Canadians	ATL (n=164)	QC (n=186)	ON (n=284)	MB/SK (n=106)	AB (n=103)	BC (n=152)
Priority (7-10)	69%	56%	64%	61%	49%	60%
Neutral (5-6)	20%	27%	20%	18%	28%	25%
Not a priority (1-4)	10%	14%	14%	16%	20%	14%
Don't know	1%	3%	2%	4%	2%	1%
Simplifying the tax code	ATL (n=176)	QC (n=201)	ON (n=295)	MB/SK (n=92)	AB (n=88)	BC (n=146)
Priority (7-10)	64%	60%	57%	54%	60%	58%

PRIORITIES FOR THE GOVERNMENT OF CANADA						
	Region					
Neutral (5-6)	24%	25%	24%	31%	25%	26%
Not a priority (1-4)	9%	12%	11%	9%	13%	13%
Don't know	4%	3%	7%	5%	2%	3%
Signing new free trade deals	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK (n=200)	AB (n=200)	BC (n=300)
Priority (7-10)	65%	62%	59%	54%	52%	60%
Neutral (5-6)	19%	22%	25%	32%	32%	23%
Not a priority (1-4)	11%	13%	13%	10%	12%	16%
Don't know	5%	3%	3%	3%	4%	2%
Raising taxes on large businesses	ATL (n=177)	QC (n=218)	ON (n=279)	MB/SK (n=94)	AB (n=90)	BC (n=142)
Priority (7-10)	62%	68%	56%	53%	35%	59%
Neutral (5-6)	22%	22%	27%	29%	41%	24%
Not a priority (1-4)	15%	10%	15%	15%	22%	15%
Don't know	1%	1%	2%	2%	2%	1%
Closing tax loopholes used by small businesses	ATL (n=189)	QC (n=181)	ON (n=283)	MB/SK (n=100)	AB (n=104)	BC (n=143)
Priority (7-10)	37%	53%	30%	19%	23%	34%
Neutral (5-6)	27%	25%	31%	35%	25%	30%
Not a priority (1-4)	32%	19%	33%	39%	50%	34%
Don't know	4%	2%	6%	8%	1%	1%
Lowering taxes on large businesses	ATL (n=173)	QC (n=182)	ON (n=271)	MB/SK (n=106)	AB (n=110)	BC (n=158)
Priority (7-10)	22%	16%	21%	19%	15%	23%
Neutral (5-6)	21%	20%	22%	27%	36%	21%
Not a priority (1-4)	55%	63%	56%	52%	48%	55%
Don't know	1%	2%	1%	2%	1%	2%
Raising taxes on small businesses	ATL (n=180)	QC (n=198)	ON (n=277)	MB/SK (n=91)	AB (n=99)	BC (n=151)
Priority (7-10)	9%	16%	9%	9%	3%	9%
Neutral (5-6)	16%	24%	22%	15%	14%	15%
Not a priority (1-4)	72%	58%	68%	74%	82%	75%
Don't know	2%	2%	1%	2%	-	2%
Raising taxes on individual Canadians	ATL (n=174)	QC (n=209)	ON (n=285)	MB/SK (n=95)	AB (n=96)	BC (n=145)
Priority (7-10)	4%	9%	13%	12%	6%	8%
Neutral (5-6)	21%	17%	21%	16%	18%	23%
Not a priority (1-4)	75%	72%	63%	72%	73%	67%
Don't know	1%	2%	3%	1%	3%	1%

Q10: How much of a priority should each of the following be for the Government of Canada? Base: All Respondents, n=2,000 (split sample).

Background and Methodology



Background and Research Objectives

The Government of Canada has made important investments to grow the economy as well as commitments to sound fiscal management to support it. A recent example is the Budget 2017, balancing the need to make targeted investment to support economic growth, while preserving Canada's low-debt advantage for current and future generations.

New plans on developing the economy along with an uncertain global economy urge to understand how Canadians perceive the government actions, and the state of the economy.

Therefore, Finance Canada identified a need for primary market research to gain specific insights into Canadians' overall concerns and perceptions about the current state of the Canadian economy, emerging economic issues, their sense of personal economic well-being, and their expectations about the role of the Government of Canada in the economy.

The findings of this research will help the Government of Canada understand the public environment and better communicate its actions to enhance Canada's long-term growth potential.

Methodology

Overview: The research methodology consisted of two phases of research: first a series of 10 focus groups with Canadians in five different locations, followed by a national telephone survey with 2,000 Canadian households.

Focus Group Phase

Quorus adapted and translated the recruitment screener and the moderation guide for this study. The design of these research instruments relied on designs used by Finance Canada in previous waves of similar research. Quorus consultants updated these research documents to reflect the current research needs.

The target population for the focus groups consisted of adult Canadians at least 18 years old. Participants invited to participate were randomly recruited by telephone from the general public. In the design of the recruitment screener, specific questions were inserted to clearly identify whether participants qualify for the research program and to ensure a good representation of men and women from a mix of ethnicity and ages. Furthermore, a session in each city was split based on the participant's individual or household income as follows:

- "High income" was defined as anyone with a personal annual income of over \$80,000 or anyone in a household with multiple incomes with an annual household income of over \$100,000.

- “Low/middle” income was defined as anyone with a personal annual income of up to \$80,000 or anyone in a household with multiple incomes with an annual household income of under \$100,000.

For sessions in North York, participants were recruited exclusively from areas like Markham, Vaughn, Richmond Hill and other Toronto suburbs in the same zone.

For sessions in Laval, participants were recruited exclusively from areas like Laval and other North Shore suburbs.

Quorus recruited 10 participants to achieve 8-10 participants per focus group and recruited participants were offered an honorarium of \$75.00 at the end of the focus groups. Furthermore:

- All recruitment was conducted in the participant’s official language of choice, English and French, as appropriate.
- Upon request, participants were informed on how they can access the research findings.
- Upon request, participants were provided Quorus’ privacy policy.
- Recruitment confirmed each participant’s ability to speak, understand, read and write in the language in which the session was to be conducted.
- Participants were informed of their rights under the Privacy and Access to Information Acts and ensured that those rights would be protected throughout the research process. This includes: informing them of the purpose of the research; identifying both the sponsoring department or agency and research supplier; informing participants that the study will be made available to the public 6 months after field completion through Library and Archives Canada and informing them that their participation in the study is voluntary and the information provided will be administered according to the requirements of the Privacy Act.

At the recruitment stage and at the beginning of each focus group, participants were informed that the research is for the Government of Canada/ Finance Canada. Participant were also informed of audio/video taping of the focus group sessions, in addition to the presence of Finance Canada observers. Quorus ensured that prior consent was obtained at the recruitment stage and before participants entered the focus group room.

All focus groups were held in a facility that allowed the client team to observe the sessions. Professional focus group facilities were used in centers where they were available. Otherwise, Quorus arranged for viewing via closed-circuit TV in a room adjacent to the meeting room where the focus groups took place. In all locations, audio-video recording capabilities were in place.

A total of 71 individuals participated in these focus groups. The locations and dates of the sessions are presented in the grid below:

Location	Segment	Language	Number of Participants	Date and Time
Victoria, BC	High Income	English	4	August 15 @ 5:30 pm
Victoria, BC	Low / Middle Income	English	8	August 15 @ 7:30 pm
Edmonton, AB	Low / Middle Income	English	8	August 17 @ 5:30 pm
Edmonton, AB	High Income	English	7	August 17 @ 7:30 pm
North York, ON	Low / Middle Income	English	8	August 18 @ 5:30 pm
North York, ON	High Income	English	6	August 18 @ 7:30 pm
Laval, QC	High Income	French	6	August 22 @ 12:30 pm
Laval, QC	Low / Middle Income	French	9	August 22 @ 2:30 pm
Sudbury, ON	Low / Middle Income	English	7	August 23 @ 5:30 pm
Sudbury, ON	High Income	English	8	August 23 @ 7:30 pm

All focus groups were moderated by Rick Nadeau, one of Quorus' bilingual senior researchers on the Government of Canada Standing Offer.

Qualitative Research Disclaimer

Qualitative research seeks to develop insight and direction rather than quantitatively projectable measures. The purpose is not to generate “statistics” but to hear the full range of opinions on a topic, understand the language participants use, gauge degrees of passion and engagement and to leverage the power of the group to inspire ideas. Participants are encouraged to voice their opinions, irrespective of whether or not that view is shared by others.

Due to the sample size, the special recruitment methods used, and the study objectives themselves, it is clearly understood that the work under discussion is exploratory in nature. The findings are not, nor were they intended to be, projectable to a larger population.

Specifically, it is inappropriate to suggest or to infer that few (or many) real world users would behave in one way simply because few (or many) participants behaved in this way during the sessions. This kind of projection is strictly the prerogative of quantitative research.

Survey Phase

All research work was conducted in accordance with the professional standards established by the Marketing Research and Intelligence Association (MRIA), and the Government of Canada Public Opinion Research Standards, as follows:

- The survey consisted of a national telephone survey with Canadians, 18 years of age and older. The sample consisted of traditional wireline telephone numbers and a sub-quota of cell-phone only households. Cell phone numbers were added to the landline Random Digital Dialing telephone sample to reduce coverage error and provide a more representative final sample.
- Quorus designed the survey instrument in English and worked with the client team to ensure the research objectives were addressed, that plain language was used, and that the questionnaire flowed easily for respondents. Quorus collaborated with the Finance Canada to finalize the survey instrument. Quorus translated the client-approved English version of the survey. Respondents had the choice to complete the interview in English or French.
- Quorus informed respondents of their rights under the *Privacy and Access to Information Acts* and ensured that those rights were protected throughout the research process. This included: informing participants of the purpose of the research; identifying both the sponsoring department or agency and research supplier; informing participants that the study will be made available to the public in 6 months after field completion through Library and Archives Canada and informing participants that their participation in the study was voluntary and the information provided would be administered according to the requirements of the *Privacy Act*.
- The survey introduction was adjusted to appropriately capture the reality of calling Canadians on their cell phones (e.g. making sure they are not driving, providing an option to call them back on a landline if they prefer, etc.)
- The survey instrument took on average 12 minutes to complete, and consisted of mostly closed-ended questions.
- The approved final questionnaires were programmed for computer-based telephone data collection, and the survey was registered with the Marketing Research and Intelligence Association's (MRIA) National Survey Registration System.
- A total of 2,000 interviews were completed through a national telephone survey with Canadian households, using a stratified random sampling approach. The sample strata enabled maximum analysis potential by region, age group and gender.
- Data collection occurred between September 6th and October 1st, 2017, and included a pretest of 10 surveys with English respondents and 10 with French respondents. The pretest helped assess

the flow of the survey, comprehension of the questions, language, data integrity, and particularly the length of the survey instrument.

- For this study, quotas by province were established to generate sufficient data regionally for robust analysis. Data was monitored to ensure a 50/50 gender split in each province, and that no specific age cohort was under-represented. The margin of error of this sample size is +/- 2.2%, 19 times out of 20. A total of 2,000 interviews were completed using a stratified random sampling approach. The response rate for the overall sample was 7.5%. The research findings can be extrapolated to the broader audience considering the margin of error associated with this sample size, +/- 2.2%, 19 times out of 20. The margins of error vary based on a variety of factors. For instance, results for sub-groups with smaller sample sizes will have a higher margin of error. As well, the margin of error is typically highest for questions where 50% of respondents answered one way and 50% answered another way. The margin of error typically decreases as the percent for a particular response approaches 0% or 100%.

PROVINCE	SAMPLE DISTRIBUTION	MARGIN OF ERROR
Newfoundland and Labrador	75	+/- 11.3%
Prince Edward Island	75	+/- 11.3%
New Brunswick	100	+/- 9.8%
Nova Scotia	100	+/- 9.8%
Quebec	400	+/- 4.9%
Ontario	550	+/- 4.2%
Manitoba/Nunavut	100	+/- 9.8%
Saskatchewan	100	+/- 9.8%
Alberta/NWT	200	+/- 6.9%
British Columbia/Yukon	300	+/- 5.7%
TOTAL	2,000	+/- 2.2%

- Data was weighted by region, gender, age and urban/rural split to ensure that the final distributions within the final sample mirror those of the Canadian population according to the latest Census data.
- Note: Tables in the report may have green shaded cells, indicating statistically significant differences between segments. Similarly, sample sizes from a population are indicated with the statistical notation “n” for probability-based random samples.

DIALING DISPOSITION REPORT

	TOTAL	RDD	CELL
Total Numbers Attempted	92711	25376	67335
Out-of-scope - Invalid	58622	8118	50504
Unresolved (U)	11078	5570	5508
<i>No answer/Answering machine</i>	<i>11078</i>	<i>5570</i>	<i>5508</i>
In-scope - Non-responding (IS)	3981	1751	2230
<i>Language barrier</i>	<i>546</i>	<i>270</i>	<i>276</i>
<i>Incapable of completing (ill/deceased)</i>	<i>200</i>	<i>134</i>	<i>66</i>
<i>Callback (Respondent not available)</i>	<i>3235</i>	<i>1347</i>	<i>1888</i>
Total Asked	19030	9937	9093
<i>Refusal</i>	<i>15980</i>	<i>8119</i>	<i>7861</i>
<i>Termination</i>	<i>310</i>	<i>158</i>	<i>152</i>
In-scope - Responding units (R)	2740	1660	1080
<i>Completed Interview</i>	<i>2000</i>	<i>1065</i>	<i>935</i>
<i>NQ - Quota Full</i>	<i>740</i>	<i>595</i>	<i>145</i>
Refusal Rate	85.60	83.29	88.12
Response Rate	8.04	9.62	6.42
Incidence	100.00	100.00	100.00

Appendices



Focus Group Recruitment Screener

Specifications

- Recruit 10 participants.
- Participants to be paid \$75.
- 1 group in each location will be held with participants from low/middle income households and the other with participants from high income households.
- “High income” is defined as anyone with a personal annual income of over \$80,000 or anyone in a household with multiple incomes with an annual household income of over \$100,000.
- “Low/middle” income is defined as anyone with a personal annual income of up to \$80,000 or anyone in a household with multiple incomes with an annual household income of under \$100,000.
- **For sessions in North York**, participants are to be recruited exclusively from areas like Markham, Vaughn, Richmond Hill and other Toronto suburbs in the same zone.
- **For sessions in Laval**, participants are to be recruited exclusively from areas like Laval and other North Shore suburbs.

Group 1 Victoria August 15 5:30 pm High income	Group 2 Victoria August 15 7:30 pm Low/middle income	Group 3 Edmonton August 17 5:30 pm Low/middle income	Group 4 Edmonton August 17 7:30 pm High income	Group 5 North York August 18 5:30 pm Low/middle income
Group 6 North York August 18 7:30 pm High income	Group 7 Laval August 22 5:30 pm High income	Group 8 Laval August 22 7:30 pm Low/middle income	Group 9 Sudbury August 23 5:30 pm Low/middle income	Group 10 Sudbury August 23 7:30 pm High income

Questionnaire

A. Introduction

Hello/Bonjour, my name is _____. Would you prefer to continue in English or French? / Préférez-vous continuer en anglais ou en français?

[INTERVIEWER NOTE: FOR ENGLISH GROUPS, IF PARTICIPANT WOULD PREFER TO CONTINUE IN FRENCH, PLEASE RESPOND WITH, "Malheureusement, nous recherchons des gens qui parlent anglais pour participer à ces groupes de discussion. Nous vous remercions de votre intérêt." FOR FRENCH GROUP, IF PARTICIPANT WOULD PREFER TO CONTINUE IN ENGLISH, PLEASE RESPOND WITH, "Unfortunately, we are looking for people who speak French to participate in this discussion group. We thank you for your interest."]

I'm calling from Nielsen, an international research firm with offices in Canada. We're organizing a series of discussion groups on behalf of the Government of Canada to discuss current issues of interest to Canadians. The groups will last up to two hours and people who take part will receive a cash gift to thank them for their time.

Participation is completely voluntary. We are interested in your opinions. No attempt will be made to sell you anything or change your point of view. The format is a "round table" discussion led by a research professional with up to eight participants. All opinions will remain anonymous and will be used for research purposes only in accordance with laws designed to protect your privacy.

[INTERVIEWER NOTE: IF ASKED ABOUT PRIVACY LAWS, SAY: "The information collected through the research is subject to the provisions of the *Privacy Act*, legislation of the Government of Canada, and to the provisions of relevant provincial privacy legislation."]

Before we invite you to attend, we need to ask you a few questions to ensure that we get a good mix of people in each of the groups. This will take 5 minutes. May I continue?

Yes	CONTINUE
No	THANK/DISCONTINUE

B. Qualification

1. Do you, or any member of your household or immediate family, work in any of the following fields? **READ LIST**

Marketing research, public relations firm, or advertising agency,
The media (radio, television, newspapers, magazines, etc.),
A federal or provincial government department or agency
A political party

Yes	THANK/DISCONTINUE
No	CONTINUE

2. We have been asked to speak to participants from all different ages. May I have your age please?
_____. **RECORD – OBTAIN A RANGE ACROSS THE 2 SESSIONS IN EACH CITY**

Under 18	THANK/DISCONTINUE
18 to 24 years	
25 to 34 years	
35 to 44 years	
45 to 54 years	
55 to 64 years	
65 to 74 years	
75 years or older	THANK/DISCONTINUE

3. Record gender by observation. **50/50 SPLIT**

Female
Male

4. Are you the head or co-head of your household?

Yes **CONTINUE**
No **THANK AND TERMINATE**

5. Are you working?

Full Time (35 hrs. +)	4 minimum
Part Time (under 35 hrs.)	2 max.
Homemaker	1 max.
Student	1 max. ONLY QUALIFIES FOR GROUPS 1, 4, 5, 8, 9
Retired	2 max.
Unemployed	1 max. ONLY QUALIFIES FOR GROUPS 1, 4, 5, 8, 9

****STUDENTS SKIP TO Q10**

6. **[ASK FULL AND PART TIME ONLY]** What is your current occupation? **RECORD:**

Type of Job: _____
Type of Company: _____

[IF PARTICIPANT WAS OR IS AT ALL INVOLVED IN TAX RETURN PREPARATION, TAX EXPERT, ACCOUNTANT OR RELATED INDUSTRY, FLAG FOR SUPERVISOR]

7. How many people, including yourself, earn an income in your household?

One	ASK Q8
Two	SKIP TO Q9
Three	SKIP TO Q9
Four or more	SKIP TO Q9

IF ONLY ONE PERSON IN HOUSEHOLD ASK:

8. Which of the following categories best corresponds to your total personal annual income, before taxes, for 2016? **READ**

Under \$30,000	GROUPS 1, 4, 5, 8, 9
\$30,000 to \$60,000	GROUPS 1, 4, 5, 8, 9
\$60,000 to \$80,000	GROUPS 1, 4, 5, 8, 9
\$80,000 to \$100,000	GROUPS 2, 3, 6, 7, 10
\$100,000 to \$150,000	GROUPS 2, 3, 6, 7, 10
\$150,000 and over	GROUPS 2, 3, 6, 7, 10
REFUSE/DK/NA	TERMINATE

ASK ALL FROM HOUSEHOLDS WITH MORE THAN ONE PERSON:

9. Which of the following categories best corresponds to the total annual income, before taxes, of all members of your household, for 2016? **READ**

Under \$30,000	GROUPS 1, 4, 5, 8, 9
\$30,000 to \$60,000	GROUPS 1, 4, 5, 8, 9
\$60,000 to \$80,000	GROUPS 1, 4, 5, 8, 9
\$80,000 to \$100,000	GROUPS 1, 4, 5, 8, 9
\$100,000 to \$150,000	GROUPS 2, 3, 6, 7, 10
\$150,000 and over	GROUPS 2, 3, 6, 7, 10
REFUSE/DK/NA	TERMINATE

ASK ALL

10. Could you please tell me what is the last level of education that you completed? **READ LIST; GET MIX**

Some High School only
Completed High School
Trade School certificate
Some Post secondary
Completed Post secondary
Graduate degree

11. Do you consider yourself to be a member of a visible ethno-cultural group?

Yes	CONTINUE
No	GO TO Q13

12. What is your ethnic background? **RECORD:**

Ethnicity: _____

In each city, recruit at least two per group who are of non-European descent or who are other visible minorities (i.e. Chinese or South Asian, but could include aboriginal people or Afro-Canadians as well).

13. Participants in group discussions are asked to voice their opinions and thoughts, how comfortable are you in voicing your opinions in front of others? Are you... **READ OPTIONS**

Very comfortable	MIN 5 PER GROUP
Fairly comfortable	
Not very comfortable	TERMINATE
Very uncomfortable	TERMINATE

14. Have you ever attended a discussion group or interview on any topic that was arranged in advance and for which you received money for your participation?

Yes	MAXIMUM 5 PER GROUP
No	GO TO INVITATION

15. When did you last attend one of these discussion groups or interviews?

Within the last 6 months	TERMINATE
Over 6 months ago	

16. How discussion groups or interviews have you attended in the past 5 years?

Fewer than 5	
5 or more	TERMINATE

17. Sometimes participants are also asked to write out their answers on a questionnaire. Is there any reason why you could not participate? If you need glasses to read, please remember to bring them. (Add hearing impairment.)

Yes	TERMINATE
No	

TERMINATE IF RESPONDENT OFFERS ANY REASON SUCH AS SIGHT OR HEARING PROBLEM, A WRITTEN OR VERBAL LANGUAGE PROBLEM, A CONCERN WITH NOT BEING ABLE TO COMMUNICATE EFFECTIVELY.

C. INVITATION TO PARTICIPATE

I would like to invite you to attend the focus group session where you will exchange your opinions in a moderated discussion with other Canadians from your community. The discussion will be lead by a researcher from the national public opinion research firm, Quorus Consulting. The session will be taped and observed but your participation will be confidential. The group will take place on **[DAY OF WEEK]**, **[DATE]**, at **[TIME]**. It will last two hours. People who attend will receive \$75 to thank them for their time. Would you be willing to attend?

Yes
No

TERMINATE

Do you have a pen handy so that I can give you the address where the group will be held? It will be held at **[INSERT FACILITY]**. I would like to remind you that the group is at **[TIME]** on **[DATE]**. We ask that you arrive 15 minutes early.

At the facility, you will be asked to produce photo identification, so please remember to bring something with you (for example, a driver's license). If you use glasses to read, please remember to bring them with you. Participants may be asked to review some materials in **[ENGLISH/FRENCH]** during the discussion.

The session will be video recorded for research purposes and representatives of the Government of Canada research team will be observing from an adjoining room. You will be asked to sign a waiver to acknowledge that you will be video recorded during the session. The recordings will be used only by the Quorus Consulting research team and will not be shared with others. As I mentioned, all information collected in the group discussion will remain anonymous and be used for research purposes only in accordance with laws designed to protect your privacy.

As we are only inviting a small number of people to attend, your participation is very important to us. If for some reason you are unable to attend, please call us so that we can get someone to replace you. You can reach us at **[INSERT NUMBER]** at our office. Please ask **for [INSERT NAME]**.

Someone will call you the day before to remind you about the session.

So that we can call you to remind you about the focus group or contact you should there be any changes, can you please confirm your name and contact information for me?

First name: _____
Last Name: _____
Daytime phone number: _____
Evening phone number: _____

Questionnaire de recrutement

Caractéristiques

- Au total, 10 personnes seront recrutées pour chaque séance.
- Chacun des participants recevra 75 \$.
- Dans chaque ville, un groupe sera composé de participants provenant de ménages à faible/moyen revenu et un autre, de participants provenant de ménages à revenu élevé.
- Un « revenu élevé » est défini comme quiconque ayant un revenu annuel personnel supérieur à 80 000 \$ ou toute personne dans un ménage avec des revenus multiples et un revenu annuel du ménage supérieur à 100 000 \$.
- Un « faible/moyen revenu » est défini comme quiconque ayant un revenu annuel personnel pouvant atteindre 80 000 \$ ou toute personne dans un ménage avec des revenus multiples et un revenu annuel du ménage inférieur à 100 000 \$.
- **Pour les groupes à North York**, les participants devront parvenir exclusivement de banlieues comme Markham, Vaughan, Richmond Hill et d'autres banlieues de Toronto de la même région.
- **Pour les groupes à Laval**, les participants devront parvenir exclusivement de banlieues comme Laval et d'autres banlieues de la Rive Nord.

Groupe 1 Victoria 15 aout 17 h 30 Revenu élevé	Groupe 2 Victoria 15 aout 19 h 30 Faible/moyen revenu	Groupe 3 Edmonton 10 aout 17 h 30 Faible/ moyen revenu	Groupe 4 Edmonton 10 aout 19 h 30 Revenu élevé	Groupe 5 North York 18 aout 17 h 30 Faible/moyen revenu
Groupe 6 North York 18 aout 19 h 30 Revenu élevé	Groupe 7 Laval 22 aout 17 h 30 Revenu élevé	Groupe 8 Laval 22 aout 19 h 30 Faible/ moyen revenu	Groupe 9 Sudbury August 23 17 h 30 Faible/ moyen revenu	Groupe 10 Sudbury August 23 19 h 30 Revenu élevé

Questionnaire

A. Introduction

Bonjour, je m'appelle _____. Préférez vous continuer en français ou en anglais? / Would you prefer to continue in English or French?

[REMARQUE À L'INTENTION DE L'INTERVIEWEUR : DANS LE CAS DES GROUPES FRANCOPHONES, SI LE PARTICIPANT PRÉFÈRE CONTINUER EN ANGLAIS, VEUILLEZ LUI RÉPONDRE CE QUI SUIT :

« Unfortunately, we are looking for people who speak French to participate in this discussion group. We thank you for your interest. »]

DANS LE CAS DES GROUPES ANGLOPHONES, SI LE PARTICIPANT PRÉFÈRE CONTINUER EN FRANÇAIS, VEUILLEZ LUI RÉPONDRE CE QUI SUIT : « Malheureusement, nous recherchons des gens qui parlent anglais pour faire partie de ces groupes de discussion. Nous vous remercions de votre intérêt. »

Je vous appelle de Nielsen, une firme de recherche internationale ayant des bureaux au Canada. Nous organisons une série de groupes de discussion pour le compte du gouvernement du Canada afin d'explorer des sujets d'actualité qui intéressent les Canadiens. La séance de discussion durera environ deux heures. Chaque participant recevra une prime en argent en guise de remerciement.

Votre participation est entièrement volontaire. Nous aimerions connaître votre opinion. Personne ne tentera de vous vendre quoi que ce soit ni de vous amener à changer votre point de vue. Les discussions prendront la forme d'une « table ronde » dirigée par un professionnel de la recherche et réunissant huit participants au maximum. Toutes les opinions exprimées demeureront anonymes et ne serviront qu'aux fins de la recherche, conformément aux lois visant à protéger votre vie privée.

[REMARQUE À L'INTENTION DE L'INTERVIEWEUR : SI L'INTERLOCUTEUR POSE DES QUESTIONS AU SUJET DES LOIS SUR LA PROTECTION DE LA VIE PRIVÉE, DITES-LUI CE QUI SUIT : « Les renseignements recueillis dans le cadre de la recherche sont assujettis aux dispositions de la *Loi sur la protection des renseignements personnels*, des autres lois du gouvernement du Canada et des lois provinciales applicables sur la protection de la vie privée. »]

Avant de vous inviter à faire partie d'un groupe de discussion, nous devons vous poser quelques questions pour assurer une bonne diversité de participants dans chaque groupe. Il vous faudra cinq minutes pour y répondre. Puis-je continuer?

Oui	1	CONTINUER
Non	2	REMERCIER ET METTRE FIN À L'ENTRETIEN

B. Admissibilité

1. Est-ce qu'un membre de votre ménage ou de votre famille immédiate, y compris vous-même, travaille dans l'un des domaines suivants ? **LIRE LA LISTE**

Une firme d'études de marché, un cabinet de relations publiques ou une agence de publicité
Les médias (radio, télévision, journaux, revues, etc.)
Un ministère ou organisme fédéral ou provincial
Un parti politique

Oui	1	REMERCIER ET METTRE FIN À L'ENTRETIEN
Non	2	CONTINUER

2. Nous devons nous entretenir avec des participants d'âges différents. Puis-je vous demander votre âge ? _____. **INSCRIRE. RECRUTER UNE VARIÉTÉ DE PARTICIPANTS POUR LES DEUX SÉANCES DANS CHAQUE VILLE.**

Moins de 18 ans	REMERCIER ET METTRE FIN À L'ENTRETIEN
18-24 ans	
25-34 ans	
35-44 ans	
45-54 ans	
65-74 ans	
75 ans ou plus	REMERCIER ET METTRE FIN À L'ENTRETIEN

3. Noter le sexe selon vos observations. **VISER UN NOMBRE ÉGAL D'HOMMES ET DE FEMMES.**

Femme	1
Homme	2

4. Êtes-vous le chef ou l'un des chefs de votre ménage?

Oui	CONTINUER
Non	REMERCIER ET METTRE FIN À L'ENTRETIEN

5. Travaillez-vous?

À temps plein (35 heures et plus)	4 au minimum
À temps partiel (moins de 35 heures)	2 au maximum
Personne au foyer	1 au maximum
Étudiant(e)	1 au maximum GROUPES 1, 4, 5, 8, 9 SEULEMENT
Retraité(e)	2 au maximum
Sans emploi	1 au maximum GROUPES 1, 4, 5, 8, 9 SEULEMENT

**** PASSER À LA Q10 POUR LES ÉTUDIANTS**

6. **[DEMANDER AUX PERSONNES TRAVAILLANT À TEMPS PLEIN ET À TEMPS PARTIEL SEULEMENT]** Quel est votre emploi actuel? **NOTER :**

Type d'emploi : _____

Type d'entreprise : _____

(PRÉCISER : SI LE RÉPONDANT TRAVAILLE OU TRAVAILLAIT DE PRÈS OU DE LOIN DANS LA PRÉPARATION DE DÉCLARATIONS DE REVENUS, COMME FISCALISTE OU COMPTABLE, OU DANS UNE INDUSTRIE CONNEXE, L'INDIQUER POUR LE SUPERVISEUR.)

7. Combien de personnes habitant sous votre toit gagnent un revenu, vous compris?

Une	PASSER À LA Q8
Deux	SAUTER À LA Q9
Trois	SAUTER À LA Q9
Quatre ou plus	SAUTER À LA Q9

SI UNE SEULE PERSONNE DANS LE MÉNAGE, DEMANDER :

8. Laquelle des catégories suivantes correspond le mieux à votre revenu annuel personnel total, avant impôt, pour 2016? **LIRE LA LISTE**

Moins de 30 000 \$	GROUPES 1, 4, 5, 8, 9
30 000 \$ à 60 000 \$	GROUPES 1, 4, 5, 8, 9
60 000 \$ à 80 000 \$	GROUPES 1, 4, 5, 8, 9
80 000 \$ à 100 000 \$	GROUPES 2, 3, 6, 7, 10
100 000 \$ à 150 000 \$	GROUPES 2, 3, 6, 7, 10
150 000 \$ et plus	GROUPES 2, 3, 6, 7, 10
REFUS/NSP/PR	REMERCIER ET METTRE FIN A L'ENTRETIEN

DEMANDER À TOUS CEUX VIVANT DANS DES MÉNAGES DE DEUX PERSONNES ET PLUS :

9. Laquelle des catégories suivantes correspond le mieux au revenu annuel total, avant impôt, de tous les membres de votre ménage pour 2016? **LIRE LA LISTE**

Moins de 30 000 \$	GROUPES 1, 4, 5, 8, 9
30 000 \$ à 60 000 \$	GROUPES 1, 4, 5, 8, 9
60 000 \$ à 80 000 \$	GROUPES 1, 4, 5, 8, 9
80 000 \$ à 100 000 \$	GROUPES 1, 4, 5, 8, 9
100 000 \$ à 150 000 \$	GROUPES 2, 3, 6, 7, 10
150 000 \$ et plus	GROUPES 2, 3, 6, 7, 10
REFUS/NSP/PR	REMERCIER ET METTRE FIN A L'ENTRETIEN

DEMANDER À TOUS

10. Pourriez-vous me dire quel est le dernier niveau de scolarité que vous avez atteint? **LIRE LA LISTE; VISER UN ÉQUILIBRE**

- Études secondaires partielles
- Études secondaires terminées
- Certificat d'une école de métier
- Études post-secondaires partielles
- Études post-secondaires terminées
- Diplôme universitaire

11. Vous considérez-vous comme membre d'un groupe ethnoculturel visible?

Oui	CONTINUER
Non	PASSER À LA Q13

12. Quelle est votre origine ethnique? **NOTER :**

Ethnicité : _____

Dans chaque ville, recruter au moins deux personnes par groupe de descendance autre qu'européenne ou qui sont membres d'autres minorités visibles (c.-à-d. Chinois ou Sud Asiatiques, mais aussi membres de peuples autochtones ou Afro-Canadiens).

13. Les participants aux groupes de discussion sont invités à formuler opinions et commentaires. Dans quelle mesure vous sentez-vous à l'aise d'émettre vos opinions devant d'autres personnes? Vous sentez-vous...

LIRE LA LISTE

Tout à fait à l'aise	1	MINIMUM DE 5 PAR GROUPE
À l'aise	2	
Pas très à l'aise	3	REMERCIER ET METTRE FIN À L'ENTRETIEN
Pas du tout à l'aise	4	REMERCIER ET METTRE FIN À L'ENTRETIEN

14. Avez-vous déjà participé à un groupe de discussion ou à une entrevue organisée à l'avance et reçu une somme d'argent pour votre participation ?

Oui	MAXIMUM DE 5 PAR GROUPE
No	PASSER À L'INVITATION

15. À quand remonte votre dernière participation à un groupe de discussion ou à une entrevue ?

Il y a moins de 6 mois	1	REMERCIER ET METTRE FIN À L'ENTRETIEN
Il y a plus de 6 mois	2	

16. À combien de groupes ou d'entretiens face-à-face avez-vous participé au cours des 5 dernières années?

Moins de 5		
5 ou plus		REMERCIER ET METTRE FIN À L'ENTRETIEN

17. Les participants sont parfois invités à écrire leurs réponses sur un questionnaire. Y a-t-il une raison qui vous empêcherait de participer? Si vous avez besoin de lunettes pour lire, veuillez les apporter avec vous. (Ajouter déficience auditive)

Oui
Non

REMERCIER ET METTRE FIN À L'ENTRETIEN

METTRE FIN À L'ENTRETIEN SI LE RÉPONDANT MENTIONNE UN TROUBLE VISUEL OU AUDITIF, UN PROBLÈME DE LANGUE ÉCRITE OU VERBALE OU UNE INQUIÉTUDE À NE PAS POUVOIR COMMUNIQUER EFFICACEMENT.

C. INVITATION À PARTICIPER

J'aimerais vous inviter à participer à une séance de discussion de groupe durant laquelle vous pourrez échanger vos opinions avec d'autres Canadiens et Canadiennes de votre collectivité. La discussion sera animée par un professionnel de la recherche du groupe-conseil Quorus, une firme de recherche sur l'opinion publique. La séance sera enregistrée et observée, mais votre participation sera confidentielle. La discussion de deux heures aura lieu le (**JOUR DE LA SEMAINE**) (**DATE**), à (**HEURE**). Chaque participant recevra 75 \$ en guise de remerciement pour leur contribution. Acceptez-vous de participer à la séance ?

Oui 1
Non 2

REMERCIER ET METTRE FIN À L'ENTRETIEN

Avez-vous un crayon ou un stylo à portée de main pour noter l'adresse où le groupe se réunira? La discussion aura lieu à [**INSÉRER LE NOM DE L'ÉTABLISSEMENT**] le [**DATE**], à [**HEURE**]. Nous vous demandons d'arriver 15 minutes à l'avance.

N'oubliez pas d'apporter une pièce d'identité avec photo (par exemple votre permis de conduire), car on vous demandera de la présenter à votre arrivée. Si vous utilisez des lunettes de lecture, veuillez les apporter. Les participants pourraient être invités à examiner certains documents en [**FRANÇAIS / ANGLAIS**] dans le cadre de la discussion.

La discussion sera filmée aux fins de la recherche et des représentants de l'équipe de recherche du gouvernement du Canada en observeront le déroulement à partir d'une salle voisine. On vous demandera de signer un formulaire de renonciation dans lequel vous accepterez d'être filmé pendant la discussion. Les enregistrements seront utilisés uniquement par l'équipe de recherche du groupe-conseil Quorus et ne seront transmis à personne d'autre. Comme je l'ai mentionné précédemment, tous les renseignements recueillis au cours de la discussion de groupe demeureront anonymes et ne serviront qu'aux fins de la recherche, conformément aux lois visant à protéger votre vie privée.

Puisque nous n'invitons que quelques personnes à participer à la discussion, votre participation est très importante pour nous. Si vous ne pouvez vous présenter pour quelque raison que ce soit, veuillez nous en aviser par téléphone afin que nous puissions trouver un remplaçant. Vous pouvez nous joindre au [**INSÉRER LE NUMÉRO DE TÉLÉPHONE**] à notre bureau. Veuillez demander [**INSÉRER LE NOM**].

Nous vous téléphonerons la veille de la discussion pour confirmer votre présence.

Afin que nous puissions vous joindre pour vous rappeler la tenue de la discussion de groupe ou communiquer avec vous en cas de changements, auriez-vous l'obligeance de confirmer votre nom et vos coordonnées?

Prénom :

Nom :

Numéro de téléphone (jour) :

Numéro de téléphone (soir) :



Focus Group Moderation Guide

**Department of Finance
Focus Groups on the Economy
Summer 2017**

FINAL: August 14, 2017

Introduction (5 minutes)

- Introduce moderator
- Thanks for attending/value your being here
- Explain general purpose of focus group discussions:
 - Gauge *opinions* about issues/ideas/products
 - Not a knowledge test; no right or wrong answers (interested in opinions)
 - Okay to disagree; want people to speak up if hold different view
 - Do not need to direct all comments to me; can exchange ideas with each other
 - Tonight, we're conducting research on behalf of the Government of Canada. The purpose of tonight's discussion is to explore issues people care most about.
 - Looking for candor and honesty; comments treated in confidence; reporting in aggregate form only; video-taping and note-taking for report writing purposes only; observers behind one-way glass.
 - If you have a cell phone, please turn it off.
 - Any questions? ACCEPT BRIEF QUESTIONS BUT DO NOT LINGER.

Warm-up – What is on your mind? (10 minutes)

- Let's go around the table so you can each introduce yourselves to the group. Please tell us your first name, your hobbies, etc.
- **PEN AND PAPER:** Then give us a little snapshot of what's been on your mind as it relates to your family, our economy, and the country.
 - What keeps you up at night? What are your concerns right now?

Economy (15 minutes)

- Thinking about your personal economic situation...
 - What's going well?
 - What challenges are you facing right now?
- What about the middle class - how is it doing? What about those working hard to join the middle class?
- Now back to you - are things better or worse this year than last? **IF BETTER OR WORSE:** What do you think is behind that?
 - Do you think they will get better next year? What leaves you with that impression?
- And what about Canada? [Does not need to be limited to economy.]
 - Why are you confident/what makes you concerned?
- **PEN & PAPER:** What's the number one thing you think the federal government has been getting right over the last year?
- **PEN & PAPER:** What's the number one thing you think the federal government has been getting wrong in the last year?

TIME PERMITTING - Probing questions for moderator:

How do you feel about the following? (**RANDOMIZE FROM CITY TO CITY**)

- The recent rise in the Canadian dollar
- The price of gas and food
- Your job security and/or that of others in your family
- Your savings and any debt you are carrying
- The price of housing
- Confidence in the future

Taxation (60 minutes)

I'd like to shift gears a bit now and discuss the tax system in Canada.

- Do you believe the tax system in Canada needs to change? WHY?
- Are you aware of any ideas that have been suggested to change the tax system?
 - **IF AWARE:** How do you feel about that measure / those measures?
- Do you believe that people in similar circumstances, earning similar incomes, should pay similar amounts of tax?
- **HANDOUT:** Imagine you could make changes to the tax system in Canada. Keeping in mind that the government needs tax revenue to pay for services, put a minus next to up to 3 groups you think pay their fair share of taxes, and a plus next to up to 3 groups you think should pay more tax. Feel free to write in any other groups you think are missing, and add a + or – next to them.
 - Big corporations
 - Small corporations
 - The top 1% of income earners
 - Middle-income earners
 - Low-income earners
 - High-income, retired Canadians
 - Charities

[MODERATOR TALLIES +/- ON FLIP CHART]

- Why did you select the groups you did who you think should pay more tax?
 - **PROBE on top 1% of income earners if selected:** At what level of annual income do you think the top 1% starts?
 - Which of the following objectives would you rather see the government focus on when reforming the tax system for the top 1% of income earners:
 - Raising income tax rates?
 - Doing more to prevent tax evasion?
 - Closing tax loopholes that are primarily used by the richest Canadians to reduce the taxes they pay?
 - **PROBE on WHY for mentions of “small corporations”**

Why did you select the groups you did who you think already pay their fair share of taxes?

- **PROBE on “middle-income earners”:** At what income range do you think the government would need to cut taxes for in order for them to benefit the middle class? (e.g. between \$X,000 a year and \$Y,000 a year)
- **PROBE on “low-income Canadians”:** At what income range do you think the government would need to cut taxes for in order for them to benefit low-income Canadians? (e.g. between \$X,000 a year and \$Y,000 a year)
- **PROBE on WHY for mentions of “small corporations”**

REACTIONS TO TAX FAIRNESS AND COMPETITIVENESS

Mise en scène: The tax system is, of course, very complex – I am not expecting you to be a tax expert to share your thoughts on some of the issues I’ll be raising here.

In Canada, we have different tax rates - we have personal income taxes, which individuals pay, as well as business income taxes, which corporations pay. The amount of taxes these groups pay depend on many factors, but the overarching goal is ensuring that tax rates are fair and that they support economic growth. In general, corporations are taxed at a lower rate compared to individuals. And small businesses are generally taxed at a lower rate compared to larger ones. Certain tax exemptions are also available to businesses to encourage growth and investment.

Let’s illustrate this with an example: One advantage available to small business owners is a tax exemption on the profit from selling their business.

Imagine this: you have two neighbours. One decides to start a small business and the other buys an investment property. Over the years, the business has grown and the value of the investment property has appreciated. Ten years later, they decide to sell and they make a similar profit on their investments.

- In this scenario, the business owner can take advantage of the tax exemption, and the investment property owner cannot – how do you feel about this? If they make a similar amount of profit, should they pay the same amount of tax? WHY? WHY NOT?
- Does the fact that the business owner has taken many risks to start and grow their business, and has created jobs for other people matter at all?

SMALL versus LARGE BUSINESSES

I want to change the example a little bit, and talk about small versus large businesses.

Small businesses have a lower tax rate than large businesses in Canada – the rates are 10.5% and 15% respectively.

- Do you think it's appropriate to have small businesses pay a lower tax rate on their corporate income compared to larger businesses, or should the corporate tax rate be the same for all businesses like it is in the United Kingdom? Please explain.

Now there are arguments for and against this approach to taxing small businesses:

- On the one hand, some argue that it is more challenging to start and grow a business than it is to run an already-established large business so small businesses should benefit from a lower tax rate.
- On the other hand, some people say that this lower rate for small businesses might actually encourage them to stay small in order to keep the lower tax rate. They say those businesses might be less likely to hire more people, or take risks to grow larger.

Let's now revisit the earlier question:

- Do you think it's appropriate to have small businesses pay a lower tax rate on their corporate income compared to larger businesses, or should the corporate tax rate be the same for all businesses? Have anyone's views on this changed based on the arguments I just presented?

OTHER TAX-RELATED MEASURES

I'd like to know what you have heard about a few other potential areas that have been in the news.

- Have you heard about adding a tax on sugary drinks?
 - Do you think it's a good idea?
 - What do you see as the benefits of this sort of tax? Are there any drawbacks?
 - **Exploratory:** Experts have offered two opposing views on the benefits of a sugar tax.
 - On one side, this tax might discourage people from buying sugary drinks that have strong links to obesity and diseases in Canada, and tax revenue could be used to fight obesity Canada. The World Health Organization and others support this view.
 - On the other side, some studies show that taxes like this do very little to change peoples' behaviour. Also, since everybody would be paying the same sugar tax rate, it would mean that lower-income consumers would be paying more of this tax in proportion to their income.
 - What are your thoughts on these arguments?
- As you may have heard, the Government of Canada plans to legalize cannabis (marijuana).
 - **SHOW OF HANDS** - We won't have time to get into a debate about this – but just quickly, who is in favour of legalizing cannabis and who is opposed?
 - **FLIP CHART LISTS:** Like many other things we buy, the Government will tax cannabis. For those of you opposed to legalization, in what ways should the Government of Canada use this new tax revenue? ...what about for those who are in favour? **[MODERATOR WILL REVERSE ORDER FROM GROUP TO GROUP]**

There is one more tax measure I'd like to ask you about.

- Who here is familiar with the Canada Employment Credit?
- Who here believes they receive this credit?

EXPLAIN: This is a non-refundable tax credit of about \$175 that all employees in Canada with taxable income may claim when they complete their tax return. This tax credit is available to all taxpayers with employment income, to recognize that they have work-related expenses.

What if this credit were modified, so that higher income earners are no longer able to receive it but lower-income earners would continue to receive it and they would receive more:

- How would you feel about this? Do you think this measure will make the tax system more or less fair? Why do you feel this way?
- **PROBE if supportive:** Where should the cut-off be? At what income level should you stop receiving the credit?

[HANDOUT] For most of the above measures, we didn't talk about how the money raised would be spent, but there are a number of things the government could do with revenue raised. Which of the following would you prefer to see the money raised go towards? Using the form, rank your preferences from preferred (ranked as a one) to least preferred, ranked as a 5. *Handout exercise and then ask people what they think should be done and WHY.*

- Divide up the revenues and mail a check for that amount to every Canadian.
 - Provide the money to provinces through transfers that fund healthcare.
 - Invest in job skills training or retraining.
 - Lower taxes for all Canadians.
 - Cut taxes for those in the lowest tax bracket.
- Besides the options on the sheet in front of you, are there other ways you feel the Government of Canada should be using or investing new tax revenues?

Standard of Living (30 minutes)

General Perceptions on Standard of Living

I'd like to shift gears again and talk about the overall standard of living you have these days.

- Thinking about your overall standard of living these days, how would you say it compares to the standard of living Canadians had 6 months ago, 2 years ago, 6 years ago, 10 years ago and 25 years ago?
 - **SHOW OF HANDS:** In terms of standard of living, would you say that you / Canadians are better off, worse off, or about the same? Why?

FLIP CHART:

- In terms of standard of living, in what ways would you say we are better off these days compared to how Canadians had it 25 years ago?
- And in what ways would you say we are worse off?

[Moderator – try to encourage participants to summarize their thoughts in a few words – So to summarize your thought in one or two words, we are better/worse off in terms of what exactly?]

- Again thinking about overall standard of living, do you think the next generation will be better off, worse off, or about the same as you are 25 years from now? You do not have to limit your thinking to what we have on our flip charts! **SHOW OF HANDS**

AFTER GETTING OVERALL VOTE, REFER BACK TO FLIP CHART RESULTS FROM ABOVE TO GET AT FACTORS...

- And in what ways do you feel they will be better off and in what ways do you feel they will be worse off?
- Is there anything else that is not on our flip charts here that you would add as ways in which Canadians will be better or worse off 25 years from now in terms of standard of living?

Workplace of the future

Let's focus a bit on the workplace of the future.

- What things come to mind when you think about what work will look like 10 years from now? What types of things will influence our ability to succeed in the workplace of the future?

- **IF NEEDED:** In your own words, please complete the following sentence: “For me, the future of work consists of...”
- **HANDOUT:** The future of work could involve any or all of the items on this page. Considering your own career path, how concerned are you with these moving forward, if at all? **[EACH ITEM WILL BE SCORED ON A 5-POINT SCALE WHERE 1 MEANS “NOT CONCERNED ABOUT THIS AT ALL” AND 5 MEANS “VERY CONCERNED ABOUT THIS”]**
 - Role of technology, like automation, Artificial Intelligence (AI), etc.
 - Having the right skills for the jobs of tomorrow
 - Having the right education for the jobs of tomorrow
 - “Job Churn” (i.e., having many jobs or careers over the course of your life)
- **EXPLORE EACH ITEM SEPARATELY BUT QUICKLY:** How many of you scored [INSERT LIST ITEM] a 4 or a 5 on the 5-point scale **[SHOW OF HANDS]**?
 - What measures, if any, do you feel the Government of Canada should consider to enable you to become more successful on this dimension?
- How easy or difficult is it for you to improve your standard of living through hard work, education or training? What is standing in your way?

Household Indebtedness

I want to ask now about indebtedness – which is the total amount of debt, including mortgages, student loans, credit cards or lines of credit, among others, that you might currently hold.

- Have any of you heard that interest rates had gone up recently on loans like mortgages and lines of credit? **[SHOW OF HANDS]**
- Has the recent increase changed anything for you at all? ...has it changed your lifestyle? ...your intentions to purchase anything?
- Looking to the future, do rising interest rates worry you personally?
 - If rates were to go up by 1%, what would this change for you, if anything?

Paying for Things We Use

You might have heard that, as part of its efforts to modernize services and deliver value to Canadians, the Government is considering the fees Canadians pay for government services.

- Would you be willing to pay more for a Government of Canada service if it helped improve the quality or speed of that service?
- Does it make sense that individuals who use a service or program be the ones to pay for the service or program they are using?
- What about a situation where a new service, type of infrastructure or facility were introduced or built, do you believe fees for using this new service, infrastructure or facility is a good idea?
 - In what situations does it make sense?
 - In what situations does it make less sense?

Wrap up (5 minutes)

Let me leave you with a small exercise while I go to the backroom to see if my colleagues have any other questions for you:

If you had an additional \$200 each month, what would you do with it? I need you to be honest here! Write your thoughts down in front of you...we will discuss when I get back.

Guide de discussion

Ministère des Finances Groupes de discussion sur l'économie Été 2017

VERSION FINALE : 14 août 2017

Introduction (5 minutes)

- Présentation du modérateur.
- Remerciement aux participants.
- Explication des principaux objectifs des discussions de groupe :
 - Sonder les *opinions* sur certains enjeux/concepts/produits
 - Ceci n'est pas une évaluation des connaissances; il n'y a pas de bonnes ou de mauvaises réponses (nous souhaitons simplement obtenir vos opinions).
 - Vous avez le droit d'être en désaccord et d'exprimer des opinions différentes.
 - Vous n'avez pas à m'adresser tous vos commentaires. Vous pouvez échanger avec les autres participants.
 - Ce soir, nous menons une étude pour le gouvernement du Canada. La discussion portera sur les enjeux qui intéressent le plus la population.
 - Nous vous invitons à vous exprimer franchement. Les commentaires seront traités de manière confidentielle et regroupés sous forme de synthèse. La séance sera enregistrée sur bande vidéo et nous prendrons des notes pour notre rapport. Des observateurs assisteront à la discussion de l'autre côté du miroir.
 - Veuillez éteindre vos téléphones sans fil.
 - Avez-vous des questions? ACCEPTER LES QUESTIONS COURTES, MAIS NE PAS S'ATTARDER.

Introduction – À quoi pensez-vous? (15 minutes)

- Faisons un tour de table afin que chacun puisse se présenter au reste du groupe. Dites-nous votre prénom, parlez-nous de vos passe-temps, etc.
- **STYLO ET PAPIER** : Décrivez-nous le portrait que vous faites de votre famille, de notre économie et de notre pays.
 - Qu'est-ce qui vous empêche de dormir la nuit? Quelles sont vos préoccupations actuelles ?

Économie (15 minutes)

- En ce qui concerne votre situation économique personnelle...
 - Qu'est-ce qui va bien?
 - Quels sont les défis que vous devez relever?
- Comment se porte la classe moyenne ? Qu'en est-il des gens qui travaillent très fort pour accéder à la classe moyenne ?
- La situation est-elle meilleure ou pire cette année comparativement à l'an dernier? **SI MEILLEURE OU PIRE** : Comment expliquez-vous cela ?
 - Croyez-vous que la situation sera meilleure l'an prochain ? Pourquoi avez-vous cette impression ?
- Comment se porte le Canada ? [Les thèmes peuvent aller au-delà de l'économie.]
 - Qu'est-ce qui vous donne confiance/qu'est-ce qui vous préoccupe ?
- **STYLO ET PAPIER** : Quelle est la principale chose que le gouvernement fédéral a bien faite au cours de la dernière année ?
- **STYLO ET PAPIER** : Quelle est la principale chose que le gouvernement fédéral a mal faite au cours de la dernière année ?

SI LE TEMPS LE PERMET – Enjeux à approfondir (pour le modérateur) :

Comment réagissez-vous aux énoncés suivants ? (**CHANGEZ L'ORDRE DES ÉNONCÉS ALÉATOIREMENT POUR CHAQUE VILLE**)

- La hausse (**OU** l'appréciation) récente du dollar canadien
- Le prix de l'essence et des aliments
- Votre sécurité d'emploi et/ou celle d'un membre de votre famille
- Vos épargnes et les dettes que vous avez
- Le prix du logement
- Votre confiance dans l'avenir

Imposition (60 minutes)

J'aimerais maintenant changer de cap pour ouvrir une discussion sur le système fiscal au Canada.

- Croyez-vous que le système fiscal canadien devrait changer ? POURQUOI ?
- Êtes-vous au courant d'idées qui auraient été suggérées pour changer le système fiscal ?
 - **SI AU COURANT** : Quelle est votre impression de cette mesure / de ces mesures ?
- Croyez-vous que des personnes dans des circonstances semblables et ayant des revenus semblables devraient payer le même montant d'impôts ?
- **DOCUMENT À DISTRIBUER** : Imaginez-vous que vous pouvez changer le système fiscal du Canada. Tout en vous rappelant que le gouvernement a besoin de revenus fiscaux pour offrir des services, placez le signe « moins » à côté de 3 groupes (au maximum) que vous croyez paient leur juste part d'impôts et placez le signe « plus » à côté de 3 groupes (au maximum) que vous croyez devraient payer plus d'impôts. Sentez-vous libres d'ajouter le nom de tout autre groupe qui devrait se trouver sur cette liste selon vous et placez un + ou un – à côté de chacun.
 - Les grandes entreprises
 - Les petites entreprises
 - Le 1 % de Canadiens qui touchent les revenus les plus élevés
 - Les salariés à revenu moyen
 - Les salariés à faible revenu
 - Les Canadiens à la retraite, à revenu élevé
 - Les organismes caritatifs

[LE MODÉRATEUR COMPILE LES +/- SUR LE TABLEAU À FEUILLES MOBILES]

- Pourquoi avez-vous choisi les groupes sur cette liste comme groupe qui devrait payer plus d'impôt ?
 - **APPROFONDISSEZ – si le groupe a choisi le 1 % de Canadiens qui touchent les revenus les plus élevés** : Selon vous, à quel niveau de revenu annuel commence le 1 % des revenus les plus élevés ?
 - Sur quel objectif, parmi les suivants, croyez-vous que le gouvernement devrait se concentrer lors d'une réforme du système fiscal du 1 % de Canadiens qui touchent les revenus les plus élevés :
 - Augmenter le taux d'imposition ?
 - En faire davantage pour prévenir l'évasion fiscale ?
 - Éliminer les échappatoires fiscales qui sont surtout utilisées par les Canadiens les plus riches pour réduire leur montant d'impôt à payer ?

APPROFONDISSEZ – POURQUOI « les petites entreprises » ont-elles été mentionnées ?

Pourquoi avez-vous choisi les groupes sur cette liste comme groupe qui paient déjà leur juste part d'impôt ?

- **APPROFONDISSEZ – si le groupe a choisi les salariés à revenu moyen :** À quelle tranche de revenu croyez-vous que le gouvernement devrait réduire les impôts pour que ce soit avantageux pour la classe moyenne ? (p. ex. : entre X 000 \$ par année et Y 000 \$ par année)
- **APPROFONDISSEZ – si le groupe a choisi les salariés à faible revenu :** À quelle tranche de revenu croyez-vous que le gouvernement devrait réduire les impôts pour que ce soit avantageux pour les Canadiens à faible revenu ? (p. ex. : entre X 000 \$ par année et Y 000 \$ par année)

APPROFONDISSEZ – POURQUOI « les petites entreprises » ont-elles été mentionnées ?

RÉACTIONS FACE À L'ÉQUITÉ FISCALE ET À LA COMPÉTITIVITÉ

Mise en scène : On s'entend que le système fiscal est très complexe – vous n'avez pas besoin d'être un expert en fiscalité pour partager vos opinions sur les enjeux que je vous présente dans ce segment.

Il existe différents taux d'imposition au Canada – il y a l'impôt des particuliers, ce qu'un individu doit payer, et l'impôt sur le revenu tiré d'une entreprise, ce que les entreprises doivent payer. Le montant d'impôts à payer pour ces groupes dépend de plusieurs facteurs, mais l'objectif global est de s'assurer que les taux d'imposition sont équitables et qu'ils soutiennent la croissance économique. En général, le taux d'imposition des entreprises est inférieur à celui des particuliers. Dans le cas des petites entreprises, leur taux d'imposition est habituellement plus bas que celui des grandes entreprises. Les entreprises peuvent aussi obtenir certaines exemptions fiscales pour stimuler la croissance et l'investissement.

Permettez-moi d'illustrer cela par un exemple concret : On offre une exemption fiscale aux propriétaires d'une petite entreprise sur les profits réalisés lors de la vente de leur entreprise.

Voici le scénario : vous avez deux voisins. L'un d'entre eux décide de démarrer une petite entreprise et l'autre achète un bien de placement (**OU** investi dans un bien immobilier, un terrain ou un immeuble). Au fil du temps, l'entreprise a grandi et la valeur du bien de placement a augmenté. Dix ans plus tard, ils décident tous deux de vendre et réalisent un profit similaire sur leur investissement.

- Dans ce scénario, le propriétaire de l'entreprise peut avoir accès à une exemption fiscale alors que le propriétaire du bien de placement ne peut pas. Comment réagissez-vous à ceci? S'ils ont réalisé un profit similaire, devraient-ils payer le même taux d'imposition ? POURQUOI ? POURQUOI PAS ?

- Est-ce que le fait que le propriétaire d'une entreprise a pris des risques en démarrant et en faisant grandir son entreprise, et a créé des emplois pour d'autres personnes compte pour quelque chose ?

PETITES ENTREPRISES PAR RAPPORT AUX GRANDES ENTREPRISES

J'aimerais changer l'exemple un peu, et parler des petites entreprises par rapport aux grandes entreprises.

Au Canada, les petites entreprises ont un taux d'imposition inférieur à celui des grandes entreprises – le taux est de 10,5 % pour les petites et 15 % pour les grandes.

- Croyez-vous qu'il soit approprié qu'une petite entreprise paie moins d'impôt sur le revenu de l'entreprise comparativement à une grande entreprise, ou croyez-vous que le taux d'imposition des entreprises (**OU** des sociétés) devrait être le même pour toutes les entreprises, comme c'est le cas au Royaume-Uni ? Veuillez expliquer.

Il existe des arguments pour et contre cette approche sur l'imposition des petites entreprises.

- D'une part, certains avancent que le fait de démarrer et faire croître une petite entreprise représente un plus grand défi que de gérer une grande entreprise déjà établie; donc que les petites entreprises devraient profiter d'un taux d'imposition plus bas.
- D'autre part, certaines personnes disent que le taux plus faible pour les petites entreprises pourrait encourager leurs propriétaires à les garder petites pour maintenir ce taux d'imposition plus faible. Ils croient que ces entreprises pourraient être moins portées à embaucher plus d'employés ou à prendre des risques pour grandir.

Maintenant, retournons à la question précédente :

- Croyez-vous qu'il soit approprié qu'une petite entreprise paie moins d'impôt sur le revenu de l'entreprise comparativement à une grande entreprise, ou croyez-vous que le taux d'imposition des entreprises devrait être le même pour toutes les entreprises ? Suite aux arguments que je viens de vous présenter, y en a-t-il parmi vous qui ont changé d'opinion ?

AUTRES MESURES FISCALES

J'aimerais savoir si vous avez entendu parler d'autres thèmes qui sont dans l'actualité.

- Avez-vous entendu parler de l'ajout d'une taxe sur les boissons sucrées ?
 - Croyez-vous que c'est une bonne idée ?
 - Quel avantage voyez-vous à ce genre de taxe ? Y a-t-il des inconvénients ?
 - **Exploratoire** : Les experts présentent des opinions contraires sur les avantages d'une taxe sur le sucre.
 - D'un côté, on croit qu'une telle taxe pourrait décourager les gens d'acheter des boissons sucrées qui sont en lien étroit avec l'obésité et les maladies au Canada et

- que les revenus générés pourraient servir à lutter contre l'obésité au Canada. L'Organisation mondiale de la santé et d'autres appuient ce point de vue.
- De l'autre côté, certaines études ont démontré qu'une taxe comme celle-ci ne change pas vraiment le comportement des gens. Aussi, puisque tout le monde paierait le même montant de taxe sur le sucre, la proportion de taxe à payer par rapport au revenu serait plus élevée pour un consommateur à faible revenu.
 - Comment réagissez-vous à ces arguments ?
- Comme vous l'avez probablement entendu, le gouvernement du Canada prévoit légaliser le cannabis (la marijuana).
 - **À MAIN LEVÉE** – Nous n'avons pas le temps de discuter de cette question à fond – mais rapidement, qui est en faveur de la légalisation de la marijuana et qui s'y oppose ?
 - **ÉNUMÉRATION SUR TABLEAU À FEUILLES VOLANTES** : Comme pour l'achat d'un grand nombre de produits, le gouvernement taxera la vente de cannabis. Pour ceux d'entre vous qui s'opposent à la légalisation du cannabis, de quelle manière le gouvernement du Canada devrait-il utiliser les revenus générés par cette nouvelle taxe ? ... pour ceux qui sont d'accord avec la légalisation, qu'en dites-vous ? **[LE MODÉRATEUR INVERSERA L'ORDRE D'UN GROUPE À L'AUTRE]**

Il y a une autre mesure fiscale que j'aimerais apporter à votre attention.

- Qui dans ce groupe connaît le Crédit canadien pour emploi ?
- Qui dans ce groupe croit recevoir ce crédit ?

EXPLIQUER : C'est un crédit d'impôt non remboursable d'environ 175 \$ que tous les employés canadiens ayant un revenu imposable peuvent réclamer dans leur déclaration d'impôts. Ce crédit d'impôt est offert à tous les contribuables qui ont un revenu d'emploi pour reconnaître qu'ils ont des dépenses reliées à leur travail.

Si on modifiait ce crédit de sorte que les salariés à revenu élevé ne peuvent plus le recevoir, mais que les salariés à faible revenu continuent de le recevoir et que le crédit soit plus élevé :

- Comment réagiriez-vous à cette mesure ? Croyez-vous que cette mesure rendra le système fiscal plus équitable ou moins équitable ? Pourquoi ?
-
- How would you feel about this? Do you think this measure will make the tax system more or less fair? Why do you feel this way?
- **APPROFONDISSEZ si les gens appuient la mesure** : À quel niveau de salaire devrait-on faire la coupure du crédit ? À quel niveau de salaire devriez-vous cesser de recevoir le crédit ?

[DOCUMENT À DISTRIBUER] Nous n'avons pas discuté de la manière de dépenser les revenus générés par la plupart des mesures mentionnées ci-dessus. Le gouvernement a plusieurs options. Parmi les options suivantes, quelle est votre option préférée pour l'allocation de ces fonds ? En vous servant du document distribué, accordez une préférence à chaque énoncé, 1 indiquant qu'il s'agit de votre option préférée et 5 indiquant celle que vous préférez le moins. *Distribuer le document puis demander aux gens ce qui devrait être fait et POURQUOI.*

- Diviser le montant des revenus par le nombre de Canadiens et poster un chèque pour ce montant à chacun.
 - Allouer ces revenus aux soins de santé en effectuant des transferts aux provinces.
 - Investir dans la formation ou le recyclage professionnels.
 - Réduire le taux d'imposition pour tous les Canadiens.
 - Réduire le taux d'imposition pour ceux qui se trouvent dans la tranche de revenus la plus faible.
- En plus des options qui se trouvent sur la feuille devant vous, y a-t-il d'autres endroits où vous aimeriez voir le gouvernement du Canada utiliser ou investir les revenus provenant des nouvelles taxes ?

Niveau de vie (30 minutes)

Perceptions générales sur le niveau de vie

J'aimerais encore une fois changer de sujet pour maintenant discuter de votre niveau de vie en général à l'heure actuelle.

- En réfléchissant à votre niveau de vie présent, comment croyez-vous qu'il se compare au niveau de vie des Canadiens il y a 6 mois, 2 ans, 6 ans, 10 ans et 25 ans ?
 - **À MAIN LEVÉE** : En parlant du niveau de vie, diriez-vous que vous/que les Canadiens se portent mieux, se portent moins bien, ou que le niveau de vie vous semble le même ? Pourquoi ?

TABLEAU À FEUILLES MOBILES :

- En parlant du niveau de vie, de quelle manière trouvez-vous que nous nous portons mieux aujourd'hui que les Canadiens d'il y a 25 ans ?
- Et de quelle manière diriez-vous que nous nous portons moins bien ?

[Au modérateur – essayer d'encourager les participants à résumer leurs propos en quelques mots – En résumant vos idées en un ou deux mots, sur quoi exactement nous portons-nous mieux ou moins bien ?]

- En réfléchissant encore une fois au niveau de vie en général, croyez-vous que les personnes de la prochaine génération se porteront mieux, moins bien ou de la même manière que vous dans 25 ans ? Vous pouvez ajouter aux thèmes déjà sur les feuilles mobiles! **À MAIN LEVÉE**

SUITE AU VOTE, RETOURNER AUX RÉSULTATS OBTENUS CI-DESSUS SUR LES FEUILLES MOBILES POUR DISCUTER DES FACTEURS ...

- De quelle manière pensez-vous qu'ils se porteront mieux et de quelle manière pensez-vous qu'ils se porteront moins bien ?
- Y a-t-il d'autres facteurs qui ne se trouvent pas sur nos feuilles mobiles que vous aimeriez ajouter pour illustrer comment le niveau de vie des Canadiens se porterait mieux ou se porteraient moins bien dans 25 ans ?

Le monde du travail de l'avenir

Portons notre attention sur le monde du travail de l'avenir.

- Qu'est-ce qui vous vient à l'esprit si on vous demande à quoi ressemblera le monde du travail dans 10 ans ? Quel genre de choses pourrait influencer notre capacité à réussir dans le monde de travail de l'avenir ?
 - **AU BESOIN** : Dans vos propres mots, complétez la phrase suivante : « Pour moi, l'avenir du monde du travail, c'est ... »
- **DOCUMENT À DISTRIBUER** : Le monde du travail de l'avenir pourrait comprendre un ou plusieurs éléments inscrits sur cette feuille. En considérant votre propre cheminement de carrière, quel est votre niveau de préoccupation par rapport à ces éléments ? **[CHAQUE ÉLÉMENT SERA ÉVALUÉ SUR UNE ÉCHELLE DE 5 POINTS OÙ 1 SIGNIFIE QUE "VOUS N'ÊTES PAS DU TOUT PRÉOCCUPÉ PAR CET ÉLÉMENT" ET 5 SIGNIFIE « QUE VOUS ÊTES TRÈS PRÉOCCUPÉ PAR CET ÉLÉMENT »]**
 - Le rôle de la technologie, par exemple l'automatisation, l'intelligence artificielle (IA), etc.
 - Avoir les compétences qu'il faut pour les emplois de demain
 - Avoir l'éducation qu'il faut pour les emplois de demain
 - « Le roulement des emplois » (p. ex.: avoir plusieurs emplois ou plusieurs carrières au cours de votre vie)
- **EXPLORER CHAQUE ÉLÉMENT SÉPARÉMENT, MAIS RAPIDEMENT** : Combien d'entre vous avez donné un 4 ou un 5 sur l'échelle de 5 à [INSÉRER L'ÉLÉMENT] **[À MAIN LEVÉE]** ?
 - Quelles mesures, s'il y en a, croyez-vous que le gouvernement du Canada devrait considérer pour que vous puissiez mieux réussir dans cette dimension ?

- Est-ce facile ou difficile pour vous d'améliorer votre niveau de vie en travaillant fort, par l'éducation ou par la formation ? Qu'est-ce qui vous empêche d'y arriver ?

L'endettement des ménages

J'aimerais maintenant vous poser des questions sur l'endettement – il s'agit du montant total de dettes que vous pourriez avoir en ce moment. L'endettement comprend entre autres l'hypothèque, les prêts étudiants, les cartes de crédit et les lignes de crédit.

- Y en a-t-il parmi vous qui ont entendu parler de la récente hausse des taux d'intérêt sur des prêts comme les hypothèques et les lignes de crédit ? **[À MAIN LEVÉE]**
- Est-ce que cette récente hausse a changé les choses pour vous ? ... a-t-elle changé votre mode de vie ? ... a-t-elle changé votre décision d'acheter quelque chose ?
- En jetant un regard vers l'avenir, est-ce que la hausse des taux d'intérêt vous inquiète personnellement ?
 - Si le taux augmentait de 1 %, qu'est-ce qui changerait pour vous ? Peut-être rien ?

Payer pour ce qu'on utilise

Dans le cadre de ses efforts de modernisation et de valorisation de ses services aux Canadiens, vous avez peut-être entendu dire que le gouvernement est à considérer les droits (**OU** frais) que les Canadiens paient pour des services gouvernementaux.

- Seriez-vous prêt à payer plus pour un service du gouvernement du Canada si ce montant aidait à améliorer la qualité ou la rapidité de ce service ?
- Vous paraît-il sensé que les personnes qui utilisent un service ou un programme soient celles qui paient pour ce service ou ce programme ?
- Qu'en est-il dans le cas de l'introduction d'un nouveau service, ou de la construction d'un genre d'infrastructure ou d'installations, trouvez-vous que c'est une bonne idée d'avoir à payer des droits pour obtenir ce service ou utiliser ces infrastructures ou installations ?
 - Dans quel genre de situation est-ce sensé ?
 - Dans quel genre de situation est-ce insensé ?

Conclusion (5 minutes)

Permettez-moi de vous donner un petit exercice pendant que je me rends dans la salle d'à côté pour savoir si mes collègues ont d'autres questions pour vous :

Si vous aviez 200 \$ de plus chaque mois, que feriez-vous avec cet argent ? Soyez très honnête ! Écrivez votre réponse ... nous en discuterons à mon retour.

Focus Group Participants Materials

Handout 1

Imagine you could make changes to the tax system in Canada. Keeping in mind that the government needs tax revenue to pay for services, **put a minus (-) next to up to 3 groups you think pay their fair share of taxes, and a plus (+) next to up to 3 groups you think should pay more tax.** Feel free to write in any other groups you think are missing, and add a + or – next to them.

Big corporations _____

Small corporations _____

The top 1% of income earners _____

Middle-income earners _____

Low-income earners _____

High-income, retired Canadians _____

Charities _____

Handout 2

There are a number of things the government could do with revenue raised. Which of the following would you prefer to see the money raised go towards? **Rank your preferences from preferred (ranked as a 1) to least preferred (ranked as a 5).**

	Divide up the revenues and mail a check for that amount to every Canadian.
	Provide the money to provinces through transfers that fund healthcare.
	Invest in job skills training or retraining.
	Lower taxes for all Canadians.
	Cut taxes for those in the lowest tax bracket.

Handout 3

The future of work could involve any or all of the items on this page. Considering your own career path, how concerned are you with these moving forward, if at all? **Please score each item on a 5-point scale where 1 means “Not concerned about this at all” and 5 means “Very concerned about this”.**

<i>Check one box per row</i>	1 – Not at all concerned	2	3	4	5 – Very concerned about this
Role of technology, like automation, Artificial Intelligence (AI), etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Having the right skills for the jobs of tomorrow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Having the right education for the jobs of tomorrow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
“Job Churn” (i.e., having many jobs or careers over the course of your life)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Fiches pour les participants

Fiche 1

Imaginez-vous que vous pouvez changer le système fiscal du Canada. Tout en vous rappelant que le gouvernement a besoin de revenus fiscaux pour offrir des services, **placez le signe « moins » (-) à côté de 3 groupes (au maximum) que vous croyez paient leur juste part d'impôts et placez le signe « plus » (+) à côté de 3 groupes (au maximum) que vous croyez devraient payer plus d'impôts.** Sentez-vous libres d'ajouter le nom de tout autre groupe qui devrait se trouver sur cette liste selon vous et placez un + ou un - à côté de chacun.

Les grandes entreprises _____

Les petites entreprises _____

Le 1 % qui touche les revenus les plus élevés _____

Les salariés à revenu moyen _____

Les salariés à faible revenu _____

Les Canadiens à la retraite, à revenu élevé _____

Les organismes caritatifs _____

Fiche 2

Le gouvernement a plusieurs options pour dépenser les revenus générés. Parmi les options suivantes, quelle est votre option préférée pour l'allocation de ces fonds ? **Classez vos préférences, 1 pour indiquer votre option préférée et 5 pour indiquer celle que vous préférez le moins.**

	Diviser le montant des revenus par le nombre de Canadiens et poster un chèque pour ce montant à chacun.
	Allouer ces revenus aux soins de santé en effectuant des transferts aux provinces.
	Investir dans la formation ou le recyclage professionnels.
	Réduire le taux d'imposition pour tous les Canadiens.
	Réduire le taux d'imposition pour ceux qui se trouvent dans la tranche de revenus la plus faible.

Fiche 3

Le monde du travail de l'avenir pourrait comprendre un ou plusieurs éléments inscrits sur cette feuille. En considérant votre propre cheminement de carrière, quel est votre niveau de préoccupation par rapport à ces éléments ? **Évaluez chaque élément sur une échelle de 5 points où 1 signifie que « vous n'êtes pas du tout préoccupé par cet élément » et 5 signifie que « vous êtes très préoccupé par cet élément ».**

<i>Cochez une boîte par rangée</i>	1 – Pas du tout préoccupé	2	3	4	5 – Très préoccupé par cet élément
Le rôle de la technologie, par exemple l'automatisation, l'intelligence artificielle (IA), etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Avoir les compétences qu'il faut pour les emplois de demain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Avoir l'éducation qu'il faut pour les emplois de demain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
« Le roulement des emplois » (p. ex. : avoir plusieurs emplois ou plusieurs carrières au cours de votre vie)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Survey Questionnaire

August 2017

**Finance Canada Survey on Attitudes towards Canada's Economy (Summer)
Quorus Consulting Group Inc.**

Hello/Bonjour, my name is _____ and I am calling from Quorus Consulting on behalf of the Government of Canada. We are conducting a survey of attitudes and opinions of Canadians 18 years of age and over. Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais? (**IF NEEDED:** Je vous remercie. Quelqu'un vous rappellera bientôt pour mener le sondage en français.)

English	1
Français	2

The survey takes about 12 minutes and your responses will be kept entirely confidential and anonymous. If at any time during the survey you would prefer not to answer a specific question, you are allowed to do so.

Your decision to participate is voluntary. This call may be monitored or recorded for quality control purposes. This survey is registered with the Marketing Research and Intelligence Association (MRIA) and the information provided will be administered according to the requirements of the Privacy Act.

IF LANDLINE SAMPLE: May I please speak with the person in your household who is 18 years of age or older and who has had the most recent birthday? Would that be you? [IF THAT PERSON IS NOT AVAILABLE ARRANGE CALLBACK]"

IF CELLPHONE SAMPLE: Are you at least 18 years old?

IF CELL PHONE SAMPLE ASK A AND B

A Are you in a safe place to talk – for example not operating a motor vehicle?

Yes	[RE-INTRODUCE YOURSELF, IF NECESSARY]
No	[ARRANGE CALLBACK DATE/TIME]

B At home, do you have a traditional telephone line other than a cell phone?

Yes	CHECK AGAINST QUOTA
No	CHECK AGAINST QUOTA

[IF LANDLINE RECORD REGION FROM SAMPLE]

[IF CELL PHONE SAMPLE ASK C]

C In which province or territory do you live? **DO NOT READ LIST**

Newfoundland	1
Prince Edward Island	2
Nova Scotia	3
New Brunswick	4
Quebec	5
Ontario	6
Manitoba	7
Saskatchewan	8
Alberta	9
British Columbia	10
Yukon	11
Northwest Territories	12
Nunavut	13

D Gender **[DO NOT ASK: record based on interviewer observation]**

Female	1
Male	2

MAIN SURVEY

Assessments of Economy

1A. (T) Thinking of the issues facing Canada today, which one would you say the Government of Canada should focus on most? **[CAPTURE FIRST MENTION]**

[NO PRE-CODED LIST - INTERVIEWER NOTE: TOP ANSWER MUST BE RECORDED FIRST. ALL OTHER RESPONSES WILL BE RECORDED ON THE NEXT SCREEN.]

99 – [DO NOT READ] Don't know/Refused – SKIP TO Q.2

1B. (T) Are there any others? **[IF NECESSARY: Thinking of the issues facing Canada today, which one would you say the Government of Canada should focus on most?]**

RECORD VERBATIM - [MULTIPLE MENTIONS]

99 – [DO NOT READ] Don't know/Refused

Q2. (T) Using a scale from 1 to 10, where 1 is terrible and 10 is excellent, how would you rate the following: **[RANDOMIZE b TO f] REPEAT SCALE AS NEEDED**

- a. the current state of the Canadian economy?
- b. the current state of the United States economy?
- c. the current state of the **[PROVINCE]** economy?
- d. the current value of the Canadian dollar relative to the US dollar?
- e. the current price of gasoline?
- f. the current state of your own personal financial situation?

Terrible	1
	2
	3
	4
	5
	6
	7
	8
	9
Excellent	10
VOLUNTEERED	
Not sure	99

Q3. How concerned are you, if at all, that you or someone in your household may lose their job in the next six months? Please use a scale from 1 to 10, where 1 is not at all concerned and 10 is very concerned.

Not at all concerned	1
	2
	3
	4
	5
	6
	7
	8
	9
Very concerned	10
VOLUNTEERED	
Not applicable / Retired / Not working	98
Don't know	99

Economic Confidence

Q4. How would each of the following statements make you feel regarding the Canadian economy? Please use a scale from 1 to 10 where 1 means it makes you feel a lot worse about the Canadian economy, and 10 means it makes you feel a lot better. **IF NEEDED:** We are not looking for you to be an expert on this topic – we are just looking for your general impressions. **REPEAT SCALE ONLY IF NEEDED**

(RANDOMIZE ORDER)

- a) (SPLIT) Canadian stock markets increase in value / Canadian stock markets decrease in value
- b) (SPLIT) The Canadian dollar increases in value / The Canadian dollar decreases in value
- c) (SPLIT) An increase in interest rates / A decrease in interest rates
- d) (SPLIT) Canada's debt grows faster than the economy / The economy grows faster than Canada's debt

- e) (SPLIT) The deficit decreases / The deficit increases **IF NEEDED:** The “deficit” is how much expenses exceed revenues in any given year. This is different from “debt” which is the sum of everything we owe.
- f) (SPLIT) The unemployment rate decreases / The unemployment rate increases
- g) (SPLIT) New jobs are created / Canadian companies lay off employees
- h) (SPLIT) Poverty decreases / Poverty increases
- i) (SPLIT) Canadians have more to save for retirement / Canadians have less to save for retirement
- j) (SPLIT) Canadians have less household debt / Canadians have more household debt
- k) (SPLIT) Household incomes increase at par with inflation / Household incomes don’t increase at par with inflation

Makes you feel a lot worse	1
	2
	3
	4
	5
	6
	7
	8
	9
Makes you feel a lot better	10
VOLUNTEERED	
Don’t know	99

Q5. Based on your general impressions, do you expect each of the following to improve, worsen or stay the same in the next six months? **IF NEEDED:** We are not looking for you to be an expert on this topic – we are just looking for your general impressions.

REPEAT SCALE ONLY IF NEEDED

(RANDOMIZE ORDER)

- a) Canada's economy
- b) Your province's economy
- c) The U.S. economy
- d) The global economy
- e) The stock market
- f) Your personal financial situation

Improve	1
Worsen	2
Stay the same	3

VOLUNTEERED	
Don't know	99

Housing and Interest Rates

Q6. Are you a home owner?

IF NEEDED: "Own your home" includes those who are making mortgage payments to own their home.

Yes	1
No	2

VOLUNTEERED	
Neither (living with parents, relatives, etc.)	3
Don't know/Refused	9

Q7. **[ASK IF Q6=1]** Do you have a mortgage on your home?

Yes	1
No	2
VOLUNTEERED	
Don't know/Refused	9

Q8. Using a scale from 1 to 10, where 1 is strongly disagree and 10 is strongly agree, to what extent do you agree or disagree with the following statements?

- a. It would be easy for you to get a home mortgage today
- b. **[ASK IF Q7=1 (have a mortgage)]** It would be easy for you to keep making mortgage payments if interest rates were to rise by [(SPLIT) half a percent / 1% / 2%] tomorrow
- c. Your personal financial situation will benefit from the recent increase in interest rates

Strongly disagree	1
	2
	3
	4
	5
	6
	7
	8
	9
Strongly agree	10
VOLUNTEERED	
Don't know	99

Priorities and Taxation

Q9. What, if anything, have you heard about the Government of Canada's proposed measures to make the tax system fairer?

RECORD VERBATIM - [MULTIPLE MENTIONS]

Have not heard anything 2

VOLUNTEERED

Don't know/Refused 99

Q10. How much of a priority should each of the following be for the Government of Canada? Please use a scale of 1 to 10, where 1 means it should not be a priority at all and 10 means it should be a top priority? Remember, we are not looking for you to be an expert on this topic – we are just looking for your general impressions. **REPEAT SCALE ONLY IF NEEDED**

(RANDOMIZE ORDER)

- a) Reducing the federal government's deficit **IF NEEDED:** The "deficit" is how much expenses exceed revenues in any given year. This is different from "debt" which is the sum of everything we owe.
- b) **(SPLIT)** Raising taxes on large businesses / Lowering taxes on large businesses
- c) **(SPLIT)** Raising taxes on small businesses / Lowering taxes on small businesses
- d) **(SPLIT)** Raising taxes on individual Canadians / Lowering taxes on individual Canadians
- e) Signing new free trade deals
- f) **(SPLIT)** Simplifying the tax code / Making the tax code fairer
- g) **(SPLIT)** Closing tax loopholes used by the richest Canadians / Closing tax loopholes used by small businesses
- h) **(SPLIT)** Transferring tax benefits from the richest Canadians to low and middle income Canadians / Making the richest Canadians pay their fair share in taxes
- i) Investing in infrastructure, like roads and public transit
- j) **(SPLIT)** Growing the middle class / Strengthening the middle class
- k) Creating jobs

I) **(SPLIT)** Increasing economic growth in Canada / Making Canada more competitive internationally

Not a priority at all	1
	2
	3
	4
	5
	6
	7
	8
	9
Top priority	10
VOLUNTEERED	
Don't know	99

DEMOGRAPHICS

READ: And now a few final questions for demographic purposes.

E In what year were you born?

(RECORD YEAR - XXXX)

9999 – DO NOT READ: Don't know/Refused

[IF PREFERS NOT TO PROVIDE A PRECISE BIRTH YEAR, ASK:]

Would you be willing to tell me in which of the following age categories you belong? **READ**

LIST

18 to 34	1
35 to 49	2
50 to 54	3
55 to 64	4
OR 65 or older?	5
[DO NOT READ] Refused	99

F What is the highest level of formal education that you have completed? **READ LIST – STOP READING WHEN REACHING THE RESPONDENT'S CATEGORY**

Grade 8 or less	1
-----------------	---

	Some high school	2
	High School diploma or equivalent	3
	Registered Apprenticeship or other trades certificate or diploma	4
	College, CEGEP or other non-university certificate or diploma	5
	University certificate or diploma below Bachelor's level	6
	Bachelor's degree	7
	Post graduate degree above bachelor's level	8
	[DO NOT READ]	
	Prefer not to answer	99
G	What language do you speak most often at home? READ LIST — ACCEPT ALL THAT APPLY	
	English	1
	French	2
	Other	3
	[DON'T READ] Don't know/Refused	99
H	Which of the following categories best describes your current employment status? Are you... READ LIST – ACCEPT ONE ANSWER ONLY – STOP READING WHEN REACHING THE RESPONDENT'S CATEGORY	
	Working full-time, that is, 35 or more hours per week	1
	Working part-time, that is, less than 35 hours per week	2
	Self-employed	3
	Unemployed, but looking for work	4
	A student attending school full-time	5
	Retired	6
	Not in the workforce [FULL-TIME HOMEMAKER, UNEMPLOYED, NOT LOOKING FOR WORK]	7
	[DO NOT READ]	
	Other -- DO NOT SPECIFY	98
	Refused	99

I Which of the following categories best describes your total household income? That is, the total income of all persons in your household combined, before taxes. **READ LIST – STOP READING WHEN REACHING THE RESPONDENT’S CATEGORY**

Under \$20,000	1
\$20,000 to just under \$40,000	2
\$40,000 to just under \$60,000	3
\$60,000 to just under \$80,000	4
\$80,000 to just under \$100,000	5
\$100,000 to just under \$150,000	6
\$150,000 and above	7
[DO NOT READ] Refused	99

J Are there any children under the age of 18 currently living in your household?

Yes	1
No	2

K And, finally, to better understand how results vary by region, may I have your 6-digit postal code?

ACCEPT FIRST THREE DIGITS IF THAT IS ALL RESPONDENT IS WILLING TO GIVE
— — — — — [FORMAT A4A 5B5]

999999 – DK/NA

This survey was conducted on behalf of the Department of Finance Canada, and is registered under the Federal Access to Information Act. Thank you very much for your participation.

RECORD:

Language of interview

English	1
French	2

Questionnaire du sondage téléphonique

Aout 2017

**Sondage de Finances Canada sur les attitudes envers l'économie canadienne (été)
Le groupe-conseil Quorus Inc.**

Hello/Bonjour, je m'appelle _____ et je téléphone du groupe-conseil Quorus au nom du gouvernement du Canada. Nous menons un sondage sur les attitudes et les opinions des Canadiens de 18 ans et plus. Préférez-vous continuer en français ou en anglais? (**SI C'EST NÉCESSAIRE** : Thank you. Someone will call you back shortly to do the survey in English.)

Anglais	1
Français	2

Le sondage dure environ 12 minutes et vos réponses demeureront strictement confidentielles. Vous n'êtes pas tenu de répondre à toutes les questions, si c'est ce que vous voulez.

Vous êtes entièrement libre de participer. Cet appel pourrait être écouté ou enregistré à des fins de contrôle de la qualité. Ce sondage est enregistré auprès de l'Association de la recherche et de l'intelligence marketing (ARIM). Tous les renseignements fournis seront gérés conformément aux exigences de la *Loi sur la protection des renseignements personnels*.

POUR LES RÉPONDANTS QUI UTILISENT UN TÉLÉPHONE DE LIGNE TERRESTRE : Pourrais-je parler à la personne dans votre ménage qui est âgée de 18 ans ou plus et qui a été la dernière à célébrer son anniversaire ? Est-ce vous ? [SI CETTE PERSONNE N'EST PAS DISPONIBLE, PLANIFIER UN RAPPEL]

POUR LES RÉPONDANTS QUI UTILISENT UN TÉLÉPHONE MOBILE : Êtes-vous âgé d'au moins 18 ans ?

POUR LES RÉPONDANTS QUI UTILISENT UN TÉLÉPHONE SANS FIL, POSER LES QUESTIONS A ET B.

A Êtes-vous dans un endroit sécuritaire, par exemple, ailleurs qu'au volant d'un véhicule en marche ?

Oui	[REPRENDRE L'INTRODUCTION, AU BESOIN]
Non	[FIXER LA DATE ET L'HEURE DU RAPPEL]

B À la maison, avez-vous une ligne téléphonique résidentielle ordinaire, autre qu'un téléphone mobile ?

Oui	VÉRIFIER LES QUOTAS
Non	VÉRIFIER LES QUOTAS

[POUR LES RÉPONDANTS QUI UTILISENT UNE LIGNE TERRESTRE, INDIQUER LA RÉGION QUI FIGURE DANS L'ÉCHANTILLON.]

[POUR LES RÉPONDANTS QUI UTILISENT UN TÉLÉPHONE MOBILE, POSER LA QUESTION C.]

C Dans quelle province ou quel territoire habitez-vous ? **NE PAS LIRE LA LISTE.**

Terre-Neuve	1
Île-du-Prince-Édouard	2
Nouvelle-Écosse	3
Nouveau-Brunswick	4
Québec	5
Ontario	6
Manitoba	7
Saskatchewan	8
Alberta	9
Colombie-Britannique	10
Yukon	11
Territoires du Nord-Ouest	12
Nunavut	13

D Sexe **[NE PAS DEMANDER : Noter la réponse par observation.]**

Femme	1
Homme	2

CORPS DU SONDAGE

Évaluation de l'économie

1A. (T) Songez aux enjeux auxquels le Canada doit faire face à l'heure actuelle; sur lequel de ces enjeux le gouvernement du Canada devrait-il le plus axer ses efforts, selon vous??
[INSCRIRE LA PREMIÈRE RÉPONSE]

[AUCUNE LISTE PRÉCODÉE – NOTE À L'INTERVIEWEUR : INSCRIRE D'ABORD LA PREMIÈRE RÉPONSE. TOUTES LES AUTRES RÉPONSES DEVRONT ÊTRE INSCRITES À L'ÉCRAN SUIVANT.]

99 – **[NE PAS LIRE]** Je ne sais pas/je refuse de répondre

- 1B. (T) Y a-t-il d'autres enjeux? [**AU BESOIN** : Songez aux enjeux auxquels le Canada doit faire face à l'heure actuelle; sur lequel de ces enjeux le gouvernement du Canada devrait-il le plus axer ses efforts, selon vous?]

INSCRIRE MOT POUR MOT - [PLUSIEURS RÉPONSES POSSIBLES]

99 – [NE PAS LIRE] Je ne sais pas/je refuse de répondre

- Q2. (T) Comment évaluez-vous chacune des situations suivantes, sur une échelle de 1 à 10, où 1 signifie « désastreux » et 10, « excellent » :
- a. l'état actuel de l'économie canadienne ?
 - b. l'état actuel de l'économie américaine ?
 - c. l'état actuel de l'économie dans la province de [**PROVINCE**] ?
 - d. la valeur du dollar canadien par rapport au dollar américain ?
 - e. le prix actuel de l'essence ?
 - f. votre situation financière personnelle ?

Désastreux	1
	2
	3
	4
	5
	6
	7
	8
	9
Excellent	10
SANS AIDE	
Incertain	99

Q3. Dans quelle mesure êtes-vous préoccupé à l'idée que vous ou un autre membre de votre ménage pourriez perdre votre emploi au cours des 6 prochains mois ? Veuillez utiliser une échelle de 1 à 10 où 1 signifie que vous n'êtes pas du tout préoccupé et 10, que vous êtes très préoccupé.

Pas du tout préoccupé	1
	2
	3
	4
	5
	6
	7
	8
	9
Très préoccupé	10
SANS AIDE	
Ne s'applique pas/retraité/sans emploi	98
Je ne sais pas.	99

Confiance envers l'économie

Q4. Quel sentiment chacun des énoncés suivants vous donne-t-il au sujet de l'économie canadienne ? Veuillez utiliser une échelle de 1 à 10 où 1 signifie qu'il vous donne un sentiment bien plus négatif de l'économie canadienne et 10, qu'il vous donne un bien meilleur sentiment. **SI C'EST NÉCESSAIRE** : Nous ne nous attendons pas à ce que vous soyez un expert dans ce domaine. Nous voulons simplement avoir vos impressions générales. **RÉPÉTER L'ÉCHELLE UNIQUEMENT SI C'EST NÉCESSAIRE.**

(RANDOMISER L'ORDRE DE PRÉSENTATION)

- (50-50) La hausse des indices boursiers canadiens / La baisse des indices boursiers canadiens
- (50-50) La hausse du dollar canadien / La baisse du dollar canadien
- (50-50) Une augmentation des taux d'intérêt / Une diminution des taux d'intérêt
- (50-50) La dette du Canada qui augmente plus rapidement que notre économie / L'économie qui croît plus rapidement que la dette du Canada
- (50-50) La diminution du déficit / L'augmentation du déficit – **SI C'EST NÉCESSAIRE** : Le « déficit » est ce qui manque pour équilibrer les recettes avec les dépenses durant une année donnée. Il est différent de la « dette » qui elle, représente le total de tout ce que nous devons.

- f) (50-50) La baisse du taux de chômage / La hausse du taux de chômage
- g) (50-50) La création de nouveaux emplois / Les mises à pied dans les entreprises canadiennes
- h) (50-50) La diminution du taux de pauvreté / L'augmentation du taux de pauvreté
- i) (50-50) Les Canadiens qui en ont plus pour épargner en vue de la retraite / Les Canadiens qui en ont moins pour épargner en vue de la retraite
- j) (50-50) La dette moins élevée des ménages canadiens / La dette plus élevée des ménages canadiens
- k) (50-50) Les revenus des ménages qui augmentent au même rythme que l'inflation / Les revenus des ménages qui n'augmentent pas au rythme de l'inflation

Cela vous laisse un sentiment bien plus négatif	1
	2
	3
	4
	5
	6
	7
	8
	9
Cela vous donne un bien meilleur sentiment	10
SANS AIDE	
Ne sait pas	99

- Q5. Compte tenu de vos impressions générales, vous attendez-vous à ce que chacune des situations suivantes s'améliore, se détériore ou demeure inchangée au cours des 6 prochains mois ? **SI C'EST NÉCESSAIRE** : Nous ne nous attendons pas à ce que vous soyez un expert dans ce domaine. Nous voulons simplement avoir vos impressions générales. **RÉPÉTER L'ÉCHELLE SEULEMENT SI C'EST NÉCESSAIRE.**

(RANDOMISER L'ORDRE DE PRÉSENTATION)

- a) L'économie canadienne
- b) L'économie de votre province
- c) L'économie américaine
- d) L'économie mondiale
- e) Le marché boursier
- f) Votre situation financière personnelle

S'améliorera	1
Se détériorera	2
Demeurera inchangé	3
SANS AIDE	
Ne sait pas	99

Logement et taux d'intérêt

Q6. Êtes-vous propriétaire de votre résidence ?
SI C'EST NÉCESSAIRE : Par « propriétaire », on entend également celui qui fait des paiements hypothécaires.

Oui	1
Non	2

SANS AIDE	
Ni l'un ni l'autre (habite avec les parents, autres membres de la famille, etc.)	3
Ne sait pas/refuse de répondre	9

Q7. **[DEMANDER SI A RÉPONDU 1 À LA QUESTION 6]** Avez-vous une hypothèque sur votre résidence ?

Oui	1
Non	2
SANS AIDE	
Ne sait pas	9

- Q8. Sur une échelle de 1 à 10 où 1 signifie « entièrement en désaccord » et 10, « entièrement en accord », dans quelle mesure êtes-vous en accord ou en désaccord avec chacun des énoncés suivants ?
- a. Vous pourriez facilement obtenir un prêt hypothécaire aujourd'hui.
 - b. **[DEMANDER SI A RÉPONDU 1 À LA QUESTION 7 (a un prêt hypothécaire)]** Vous n'auriez aucune difficulté à continuer de rembourser votre prêt hypothécaire si les taux d'intérêt augmentaient de [(50-50) un demi-point de pourcentage / 1 % / 2 %] demain.
 - c. La récente hausse des taux d'intérêt aurait un effet favorable sur votre situation financière personnelle.

Entièrement en désaccord	1
	2
	3
	4
	5
	6
	7
	8
	9
Entièrement en accord	10
SANS AIDE	
Ne sait pas	99

Priorités et imposition

- Q9. Qu'avez-vous entendu au sujet des mesures proposées par le gouvernement du Canada pour rendre le régime fiscal plus équitable ?

NOTER TEXTUELLEMENT [RÉPONSES MULTIPLES]

N'a rien entendu 2

SANS AIDE
Ne sait pas/refuse de répondre 99

Q10. Quelle priorité le gouvernement du Canada devrait-il accorder à chacune des mesures suivantes ? Veuillez utiliser une échelle de 1 à 10 où 1 signifie que cela ne devrait pas du tout être une priorité et 10, que cela devrait être une priorité absolue. Encore une fois, nous ne nous attendons pas à ce que vous soyez un expert dans ce domaine. Nous voulons simplement avoir vos impressions générales. **RÉPÉTER L'ÉCHELLE UNIQUEMENT SI C'EST NÉCESSAIRE.**

(RANDOMISER L'ORDRE DE PRÉSENTATION)

- a) Réduire le déficit gouvernemental - **SI C'EST NÉCESSAIRE** : Le « déficit » est ce qui manque pour équilibrer les recettes avec les dépenses durant une année donnée. Il est différent de la « dette » qui elle, représente le total de tout ce que nous devons
- b) (50-50) Augmenter les impôts des grandes entreprises / Diminuer les impôts des grandes entreprises
- c) (50-50) Augmenter les impôts des petites entreprises / Diminuer les impôts des petites entreprises
- d) (50-50) Augmenter les impôts des Canadiens / Diminuer les impôts des Canadiens
- e) Signer de nouvelles ententes de libre-échange
- f) (50-50) Simplifier le code des impôts / Rendre le code des impôts plus équitable
- g) (50-50) Supprimer les échappatoires fiscales utilisées par les Canadiens les mieux nantis / Supprimer les échappatoires fiscales utilisées par les petites entreprises
- h) (50-50) Transférer les avantages fiscaux des Canadiens à revenu élevé aux Canadiens à faible et à moyen revenu / Exiger des Canadiens à revenu élevé qu'ils paient leur juste part d'impôts
- i) Investir dans l'infrastructure, comme les routes et les transports publics
- j) (50-50) Favoriser la croissance de la classe moyenne / Renforcer la classe moyenne
- k) Créer des emplois
- l) (50-50) Favoriser la croissance économique au Canada / Rendre le Canada plus concurrentiel à l'échelle internationale

Pas du tout une priorité	1
	2
	3
	4
	5
	6
	7
	8
	9
Priorité absolue	10
SANS AIDE – Ne sait pas	99

PROFIL DÉMOGRAPHIQUE

LIRE : Les dernières questions nous serviront à dresser le profil démographique des participants.

E Quelle est votre année de naissance ?

(NOTER L'ANNÉE : XXXX)

9999 – NE PAS LIRE : Ne sait pas/refuse de répondre

[SI LE RÉPONDANT REFUSE DE PRÉCISER L'ANNÉE, DEMANDER :]

Pourriez-vous me dire à quel groupe d'âge vous appartenez ? **LIRE LA LISTE**

18 à 34 ans	1
35 à 49 ans	2
50 à 54 ans	3
55 à 64 ans	4
OU 65 ans ou plus	5
[NE PAS LIRE] Refuse de répondre	99

F Quel est le plus haut niveau de scolarité que vous avez atteint ? **LIRE LA LISTE ET S'ARRÊTER LORSQUE LA BONNE CATÉGORIE EST MENTIONNÉE.**

6 ^e année ou moins	1
Secondaire partiel	2
Diplôme d'études secondaires ou l'équivalent	3
Apprentissage enregistré ou autre certificat ou diplôme d'une école de métiers	4
Certificat ou diplôme de cégep ou d'un établissement autre qu'une université	5
Certificat ou diplôme universitaire de niveau inférieur au baccalauréat	6
Baccalauréat	7
Diplôme d'études supérieures	8
[NE PAS LIRE]	
Préfère ne pas répondre	99

G Quelle est la langue que vous parlez le plus souvent à la maison ? **LIRE LA LISTE. ACCEPTER TOUTES LES RÉPONSES QUI S'APPLIQUENT.**

Anglais	1
Français	2
Autre	3

[NE PAS LIRE] Ne sait pas/refuse de répondre 99

H Laquelle de ces catégories décrit le mieux votre situation d'emploi actuelle ? **LIRE LA LISTE ET ACCEPTER UNE SEULE RÉPONSE. S'ARRÊTER LORSQUE LA BONNE CATÉGORIE EST MENTIONNÉE.**

Travailleur à temps plein, c.-à-d. 35 heures ou plus par semaine 1

Travailleur à temps partiel, c.-à-d. moins de 35 heures par semaine 2

Travailleur autonome 3

Sans travail, mais à la recherche d'un emploi 4

Étudiant à temps plein 5

Retraité 6

Hors du marché du travail [PERSONNE AU FOYER À TEMPS PLEIN, SANS EMPLOI, NE CHERCHE PAS D'EMPLOI]) 7

[NE PAS LIRE]

Autre – PAS BESOIN DE PRÉCISER 98

Refuse de répondre 99

I Laquelle de ces catégories décrit le mieux le revenu annuel total de votre ménage, c'est-à-dire le total des revenus de tous les membres de votre ménage, avant impôts ? **LIRE LA LISTE. S'ARRÊTER LORSQUE LA BONNE CATÉGORIE EST MENTIONNÉE.**

Moins de 20 000 \$ 1

20 000 \$ à moins de 40 000 \$ 2

40 000 \$ à moins de 60 000 \$ 3

60 000 \$ à moins de 80 000 \$ 4

80 000 \$ à moins de 100 000 \$ 5

100 000 \$ à moins de 150 000 \$ 6

150 000 \$ ou plus 7

[NE PAS LIRE] Refuse de répondre 99

J Avez-vous des enfants de moins de 18 ans domiciliés à votre adresse ?

Oui	1
Non	2

K Afin de mieux comprendre les variantes de résultats d'une région à l'autre, pourrais-je avoir votre code postal à 6 caractères ?

**ACCEPTER LES TROIS PREMIERS CARACTÈRES SI C'EST TOUT CE QUE LE RÉPONDANT
ACCEPTÉ DE DONNER.**

___ ___ ___ [FORMAT A4A 5B5]

999999 – NSP/S.O.

Ce sondage a été réalisé pour le compte du ministère des Finances du Canada. Il est enregistré en vertu de la *Loi sur l'accès à l'information*. Merci de votre participation.

NOTER :

Langue de l'entrevue

Anglais	1
Français	2