Canada

Fall 2018 – Survey and Focus Groups on the Economy

Finance Canada

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This public opinion research report presents the results of a telephone survey and a series of focus groups conducted by Quorus Consulting Group Inc. on behalf of Finance Canada. The telephone survey was conducted with 2,000 Canadian residents between September 3rd and October 14th, 2018 and a total of 10 focus groups were conducted between September 4th and the 17th.

Cette publication est aussi disponible en français sous le titre : Automne 2018 - Sondage et groupes de discussion sur l'économie.

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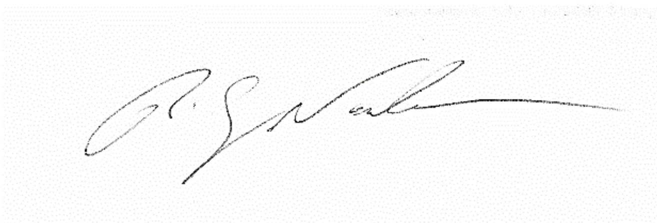

Rick Nadeau, President
Quorus Consulting Group Inc.

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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 Budget 2018, 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 government actions and the state of the economy.

Therefore, Finance Canada has 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

The **focus group** research methodology consisted of ten traditional, in-facility focus groups with Canadian adults at least 18 years old. The groups were held between September 4th and September 17th, 2018. These sessions were divided across five different locations across the country: Moncton, NB, Toronto, ON, Calgary, AB, Vancouver, BC and Quebec City, QC. Sessions in each city were split between low income and high-income households. Each session lasted two hours, participants received a $75 honorarium and the recruitment process sought a good representation of men and women and a mix of ethnicity and ages. 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.

The **survey** research methodology consisted of a national survey of 2,000 telephone interviews with Canadian adults at least 18 years old. The interviews took on average 12 minutes to complete and respondents had the choice to complete the interview in English or French. Data collection occurred between September 3rd and October 14th, 2018, including a pretest of the questionnaire. The sample consisted of traditional wireline telephone numbers and a sub-quota of cell-phone only households. The response rate for the overall sample was 6.7%. 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.

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.

Summary of Findings – Focus Group Phase

General Views on the Performance of the Federal Government

At the beginning of each session, participants were asked to write down the most important thing the federal government has been getting right over the past year and the most important thing they have been getting wrong. Two issues were just as likely to land in the "going right" category as they were to land in the "going wrong" category: immigration and the legalization of cannabis.

Other commonly noted areas the federal government had been getting right over the past year included:

- The federal government's approach to the NAFTA negotiations.
- A variety of measures could be grouped under general socio-economic policy: better child benefits, lower taxes, longer parental leave, a focus on gender equality and support for LGBTQ.

Other commonly noted areas the federal government had been getting wrong included:

- The federal government's approach to the pipeline issue, especially the recent purchase of the Trans Mountain pipeline.
- Some measures were seen as anti-small business, including what some saw as increasing taxes on small businesses, and not doing enough to support small businesses.
- The federal government was not seen as fulfilling its environmental mandate or not doing enough for the environment in general.

Views on the Economy in General

Most would describe the Canadian economy as either "stable" or performing fairly well. Compared to last year, most felt things have been stable, and moving forward, most would agree that the country's prospects largely depended on the outcome of the ongoing trade negotiations.

When asked to identify the biggest challenges facing the economy these days, negotiating NAFTA, or a lack of a trade deal with the US, was by far the most common theme raised. Other common themes were labour-related (e.g. aging population, skilled labour shortage), debt-related (e.g. national debt, consumer debt) or related to the cost of living or buying a home.

Trade Negotiations

At the time these focus groups were taking place, NAFTA negotiations were ongoing between Canada, the United States and Mexico. Participants generally believed that these negotiations mattered to them and to the country. Many were aware of where things stood in the negotiations and many named Canada's Minister of Foreign Affairs by name in their comments. Discussing the negotiations also sparked positive and negative emotions among some participants. Emotions were quite negative towards the negotiation tactics being used by the U.S. administration. Conversely, whereas most were feeling good about how Canada had been approaching the negotiations, both in terms of tact and in terms of tariff strategies. Most also believed Canada was not just doing its best but that it was also holding its own in the negotiations

Trans Mountain Expansion Project

Awareness of the Trans Mountain expansion project purchase was limited although it was higher in Calgary and in Vancouver. Despite a recent setback in the courts, most participants familiar with the project believed it would be built.

Furthermore, there was very little knowledge of the economic facts surrounding this project (e.g. that the purchase included the acquisition of an existing pipeline that is generating profits and that it is a twinning and not an entirely new pipeline). There was also very limited knowledge of the broader economic benefits of directing oil exports to tidewater via British Columbia rather than to the U.S. (e.g. that it would sell at a better price and that it would further diversify the country's export partners and reduce our dependency on the U.S. as a buyer).

Views on the project became more favourable once participants were provided all the details regarding the project. Some were still opposed to the project believing that the country should be moving away from non-renewable energy, and that the federal government should not be investing in pipelines when it was said to be so committed to the environment.

Labour Supply, Skills and Talent

Participants were somewhat torn as to whether Canada had enough workers. Participants were more likely to focus on shortages in specific sectors or industries and on certain broad types of jobs, including restaurant jobs, trades, “hard labour”, low-paying jobs, jobs in technology and healthcare. Participants expected these issues to worse over time, mostly because of an aging population / Canadians are having fewer children, the significant amount of baby boomers exiting the workforce and high levels of immigration.

The federal government was seen as potentially playing an important role on two specific fronts:

- In terms of immigration**,** they could be doing more to target and orient newcomers into specific fields. They could also work harder to foster and develop the potential of established immigrants with specific training or education who are not working in their field in Canada, are unemployed or are underemployed.
- The federal government could also work closer with post-secondary institutions and with high school students to make sure programs and the new labour force align with what the economy of tomorrow will need.

Many participants recognized that they will need to upgrade or retrain over the course of their careers. In fact, many had already lived it. The challenges associated with this were recognized and appreciated by most participants – they included not having enough time, having to forego income to take training, and, tuition costs.

There was limited awareness of support already available from the federal government for lifelong learning. Participants seemed to believe that current programs were reserved for individuals in specific situations (e.g. on E.I., in the trades, etc.). When the moderator presented the concept of a new financial support for lifelong learning, most participants agreed that this would be relevant and timely and that all Canadians should be eligible. That being said, some would like the program to provide support where support is needed the most, such as those who are unemployed or underemployed and those who can the least afford training.

Business Competitiveness

For most participants, to be “globally competitive” meant being able to sell products and services in other countries because of a price advantage, a quality advantage or because the business is meeting a need that is not being met by anyone else. In other words, the business derives its competitive edge through innovation.

There was strong support for the federal government playing a role in helping Canadian businesses become or remain globally competitive. Possible roles included:

- Negotiating favourable trade agreements,
- Stimulating innovation in Canada,
- Providing financial support to help Canadian companies grow (e.g. taxes, subsidies, etc.),
- Coordinating trade missions,
- Helping Canadian businesses identify opportunities abroad,
- Attracting the right kind of talent into Canada, and,
- Supporting post-secondary education to stimulate innovation.

General Fiscal Strategy

Most participants recognized, or just assumed, that the federal government was operating with a deficit. Although there was an important contingent of Canadians who were indifferent about this situation, there was a larger one that believed that it would be important that the deficit not increase. This does not necessarily translate into a need for a balanced budget overnight but at a minimum, these participants believed there needed to be a plan.

Participants were asked how they generally felt about the trade-off of running deficits to invest in programs and infrastructure versus balancing the budget which means making cuts and/or raising taxes. This exercise revealed support for a productive deficit that invests in programs and infrastructure to generate greater future returns. The challenge for some was that they were aware that this had been the strategy over recent years and that they were not convinced it had produced the desired outcomes, or at least they had not seen them yet. There were also concerns that if the country was running deficits during “good times,” which most believed we were living these days, the country will see even larger deficits if the economy takes a turn for the worse.

On the topic of taxes, nearly all participants believed federal government taxes had stayed the same in recent years.

Climate Change and Pollution Pricing

“Putting a price on pollution” or “putting a cost on pollution” more often than not meant charging a fee to those who pollute.

In terms of specific measures, few were aware of any steps taken by the federal government to address climate change. Based on a high-level overview of the federal government’s plan to have a national price on carbon pollution, participants were torn when it came to whether or not the federal government should impose a national price on carbon pollution. While nearly all participants felt strongly that climate change needed to be addressed, some were not convinced that a price on carbon would be effective. They either believed that the costs would just be passed down to consumers, further aggravating cost-of-living challenges faced by many, or the measure was simply seen as a license for industry to pollute.

While participants liked that the revenues from the plan were returned to the source provinces and territories, they did not like that these same provinces and territories could do what they wanted with the revenues. There was very strong support for these funds being reinvested into addressing climate change – if this were the case, then there would be broader support for a national price on carbon pollution.

Summary of Findings – Survey Phase

Priorities for the Federal Government

When asked to identify, unaided, the issues respondents believe the federal government should focus on, the most common theme is the economy and jobs. Other themes mentioned include the environment, healthcare, and social issues in general.

Assessment of the Economy

Survey respondents were asked to assess the current state of the Canadian economy, the U.S. economy and their province or territory's economy. Overall, similar proportions (over a third of respondents) believe each of these economies is doing well. Neutral ratings for the U.S. economy are lower, however more respondents were "not sure" how to rate that particular economy. When specifically asked to rate the current price of gasoline, over half of respondents provided a negative rating while 14% gave a positive rating.

In terms of how concerned Canadians are that they or someone else in their household may lose their job in the next six months, 22% of respondents feel very concerned, 11% are somewhat concerned, and 59% are not very concerned.

Economic Confidence

Respondents were asked how much of an impact various economic factors, trends and measures might have on the economy. Half of respondents were asked to assess the impact of these factors on "job creation", while the other half were asked the impact of these factors on the "competitiveness of Canadian businesses."

Respondents who were specifically asked the impact on job creation rated the federal government investments in science, technology, and innovation as having the most impact (59%), followed by NAFTA (58%), federal government investments in infrastructure (56%), and trade agreements with countries other than the U.S. (56%).

Those who were specifically asked the impact on the competitiveness of Canadian businesses show similar response patterns. They rated trade agreements with countries other than the U.S. as having the most impact (59%), followed by federal government investments in science, technology, and innovation (57%), and NAFTA (57%).

General Fiscal Situation

All survey participants were asked their impression on where the federal government's finances stand. Over three quarters of respondents think the federal government is operating with a budget deficit, just over one tenth thinks it is operating with a balanced budget, and 6% think there is a surplus. As for their expectations of how the federal government's deficit will evolve in the coming years, 66% believe the deficit will grow, 22% believe it will stay the same, and 9% expect it to get smaller.

Budget Priorities

Respondents rated how important each of several issues and priorities were for the federal government to keep in mind when making budget decisions. Over three quarters of respondents feel it is "very important" that the federal government focuses on job creation and job skills when making budget decisions. Three quarters believe it is "very important" that the federal government considers the middle class (75%) and the environment (74%). Roughly 7 in 10 feel it is "very important" the federal government considers making Canadian businesses successful internationally, balancing the budget, and focusing on innovation, making sure the deficit does not get any bigger, helping women and girls, focusing on science and on business competitiveness. Two thirds of respondents or less feel it is important the federal government considers in their priorities gender equality, helping indigenous people, and feminism.

When asked to choose between two specific budget scenarios, over two thirds of Canadians prefer the scenario whereby the federal government invests in programs and infrastructure that can create jobs and economic growth, even if that means running deficits, while just over a quarter of respondents prefer the alternative option whereby the federal government works towards balancing the budget, even if it means making cuts to programs and/or raising taxes.

Impressions of Trends in Taxes and Financial Support

Canadians were asked whether federal income taxes have been going up or down and whether the financial support from the federal government to Canadians has been going up or down (half were presented one scenario and half the other).

Regarding trends in federal taxes specifically, 48% of those respondents feel federal income taxes have gone up in recent years, while 38% feel they have stayed the same, and 7% feel they have gone down. As for federal government financial support to Canadians, 28% feel it has gone up, 36% feel it has stayed about the same, and 29% feel it has gone down.

Finally, respondents were presented with one of four different financial scenarios – receiving either $20, $50, $100, or $500 additional per month, and asked the extent to which it would impact their personal financial situation. Roughly one tenth or less see the $20 and $50 increase as having a big impact on their personal finances, while one fifth feel the additional $100 per month would have a big impact, and over half of Canadians feel receiving an extra $500 a month would have a big impact.

Other respondents were presented with different financial scenarios in which the same amounts were added up to be received annually instead of monthly ($240, $600, $1,200, and $6,000 per year). Roughly one tenth or less see the $240 and $600 increase as having a big impact on their personal finances, while 29% feel the additional $1,200 per year would have a big impact, and nearly two thirds of Canadians feel receiving $6,000 each year would have a big impact.

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Sommaire exécutif

But et objectifs de la recherche

Le gouvernement du Canada a réalisé des investissements importants pour stimuler l'économie. Il s'est engagé à pratiquer une saine gestion des finances afin de soutenir ces investissements. Un récent exemple est le Budget 2018 qui vise à préserver l'équilibre entre le besoin d'investir de manière ciblée pour assurer la croissance économique et celui de maintenir un faible niveau d'endettement au Canada pour les générations actuelles et futures.

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

Par conséquent, le ministère des Finances a jugé nécessaire de mener une étude de marché primaire pour sonder les Canadiens afin de comprendre leurs préoccupations et leurs perceptions envers l'économie actuelle, les enjeux économiques émergents, leur bien-être financier 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 communiquer plus efficacement ses plans d'action qui ont pour but d'améliorer le potentiel de croissance à long terme du pays.

Méthodologie

La méthodologie de recherche des **discussions de groupes** consistait en dix groupes conventionnels réunis dans un local de recherche. Ces groupes étaient composés d'adultes canadiens de 18 ans et plus. Les séances ont eu lieu du 4 au 17 septembre 2018, dans cinq villes : Moncton (Nouveau-Brunswick), Toronto (Ontario), Calgary (Alberta), Vancouver (Colombie-Britannique) et Québec (Québec). Dans chaque ville, les groupes étaient divisés en deux catégories : les ménages à faible revenu et les ménages à revenu élevé. Au terme de chaque séance de deux heures, les participants ont reçu une prime de 75 $. Le processus de recrutement visait à obtenir une bonne représentation hommes-femmes, d'origines ethniques et d'âges variés. Toutes les séances étaient animées par Rick Nadeau, un des principaux chercheurs bilingues de Quorus, titulaire de l'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 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 les quelques utilisateurs réels (ou plusieurs d'entre eux) agiraient d'une certaine façon simplement parce que quelques participants (ou plusieurs d'entre eux) se sont comportés ainsi durant les séances. Ce type de projection relève exclusivement de la recherche quantitative.

La méthodologie de recherche par **sondage** consistait en 2 000 entrevues téléphoniques réalisées à l'échelle nationale auprès d'adultes canadiens de 18 ans et plus. La durée moyenne de l'entrevue était de 12 minutes et les répondants pouvaient choisir entre le français et l'anglais. La collecte de données s'est déroulée du 3 septembre au 14 octobre 2018, et comportait un essai préliminaire du questionnaire. L'échantillon était composé de ménages avec numéros de téléphone conventionnel et d'un sous-quota de ménages utilisant les téléphones cellulaires uniquement. Le taux de réponse pour l'échantillon global était de 6,7 %. Les résultats 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 données ont été pondérées par région, sexe, âge et milieu urbain ou rural pour obtenir un échantillon final conforme à la population canadienne d'après les données du dernier recensement.

Sommaire des résultats – Discussions de groupes

Perceptions générales sur la performance du gouvernement fédéral

Au début de chaque séance, les participants étaient invités à noter la principale réussite du gouvernement fédéral dans la dernière année et son plus grand échec. Deux enjeux se sont retrouvés tant du côté des réussites que des échecs : l'immigration et la légalisation du cannabis.

Parmi les autres mentions de réussites du gouvernement fédéral dans la dernière année, notons :

- son approche dans les négociations de l'ALENA;
- diverses mesures qu'on pourrait regrouper dans la catégorie de la politique socio-économique générale : de meilleures prestations pour enfants, une réduction des impôts, un congé parental prolongé, des efforts pour favoriser l'égalité des sexes et du soutien pour les LGBTQ.

Parmi les autres mentions d’échecs de la part du gouvernement fédéral durant la même période, notons :

- son approche dans le dossier des pipelines, notamment l’achat récent du Trans Mountain;
- certaines mesures perçues comme nuisant aux petites entreprises, y compris ce que plusieurs considèrent comme une hausse des impôts et des efforts insuffisants pour aider les petites entreprises ;
- son incapacité, selon certains, à respecter son mandat environnemental ou son inertie vis-à-vis de l’environnement en général.

Perceptions générales envers l’économie

La majorité des répondants ont qualifié l’économie canadienne de stable ou fonctionnant relativement bien. Comparativement à l’an dernier, on semble croire que la situation est demeurée stable et qu’à l’avenir, les perspectives du pays dépendront en grande partie des conclusions des négociations commerciales en cours.

Parmi les principaux enjeux économiques mentionnés, les négociations de l’ALENA et l’absence d’accord commercial avec les États-Unis ont été, de loin, les plus souvent mentionnés. Les autres thèmes soulevés étaient liés à la main-d’œuvre (p. ex., le vieillissement de la population et la pénurie de travailleurs qualifiés), à la dette (p. ex., la dette nationale et la dette à la consommation), au coût de la vie ou à l’achat d’une maison.

Négociations commerciales

Au moment où les groupes de discussion étaient réunis, les négociations sur l’ALENA avaient lieu entre le Canada, les États-Unis et le Mexique. De façon générale, les participants étaient d’avis que ces négociations étaient importantes pour eux et pour l’ensemble du pays. Bon nombre d’entre eux savaient où en étaient les négociations et plusieurs ont nommé la ministre canadienne des Affaires étrangères dans leurs commentaires. Chez certains, la discussion sur les négociations a soulevé des émotions, tant positives que négatives. Les sentiments envers les tactiques de négociation de l’administration américaine étaient particulièrement négatifs. D’autre part, la majorité des participants ont apprécié la manière dont le Canada a abordé les négociations, c’est-à-dire avec tact et en respectant ses stratégies tarifaires. La plupart étaient d’avis que non seulement le Canada faisait de son mieux, mais qu’il défendait bien ses positions.

Projet d’expansion Trans Mountain

Dans l’ensemble, les participants étaient peu nombreux à avoir entendu parler du projet d’expansion Trans Mountain, sauf à Calgary et Vancouver. Malgré le récent échec devant les tribunaux, la plupart qui étaient au courant du projet croyaient à sa construction.

Les réalités économiques liées à ce projet sont peu connues (p. ex., le fait que l'achat comprend l'acquisition d'un pipeline existant qui génère des profits et qu'il s'agit d'un projet d'élargissement et non de construction d'un tout nouveau pipeline). Les participants avaient une connaissance très limitée des avantages économiques à diriger les exportations de pétrole vers les côtes en passant par la Colombie-Britannique plutôt que les États-Unis (p. ex., vente du pétrole à meilleur prix, diversification des partenaires exportateurs et dépendance réduite aux États-Unis en tant qu'acheteur).

Les opinions étaient plus favorables lorsque les participants ont été informés de tous les détails concernant le projet. Certains s'y opposaient toujours, invoquant que le pays devrait éviter les sources d'énergie non renouvelables et que le gouvernement fédéral ne devrait pas investir dans les pipelines, puisqu'il s'est engagé à protéger l'environnement.

Main-d'œuvre, compétences et talents

Sur la question à savoir si le Canada avait suffisamment de travailleurs, les avis étaient assez partagés. Les participants ont surtout parlé de la pénurie de main-d'œuvre dans certains secteurs et industries, ou pour certains types d'emploi, comme la restauration, les métiers, les emplois physiquement exigeants ou peu rémunérés, la technologie et les soins de santé. Les participants s'attendaient à ce que la situation se détériore au fil du temps, en raison du vieillissement de la population, du taux de natalité en baisse au Canada, du nombre considérable de baby-boomers qui quittent le marché du travail et des taux élevés d'immigration.

Pour plusieurs, le gouvernement fédéral a un rôle important à jouer à deux niveaux :

- Sur le plan de l'immigration**,** il pourrait en faire davantage pour cibler les nouveaux arrivants et les orienter vers des domaines particuliers. Des efforts supplémentaires devraient être faits pour promouvoir et développer le potentiel des immigrants établis qui ont reçu une formation particulière et qui ne travaillent pas dans leur domaine au Canada, qui sont sans emploi ou sous employés.

- Le gouvernement fédéral devrait également collaborer plus étroitement avec les établissements d'enseignement postsecondaire et les étudiants du secondaire pour s'assurer que les programmes et les nouveaux venus sur le marché du travail répondent aux besoins de l'économie de l'avenir.

De nombreux participants ont affirmé qu'ils devront se recycler ou se perfectionner au cours de leur carrière. D'ailleurs, plusieurs l'ont déjà fait. La plupart ont souligné et reconnu les défis associés à cette réalité, comme le manque de temps, le renoncement à un revenu pour suivre une formation et les frais de scolarité.

Ils étaient peu nombreux à avoir entendu parler des programmes offerts par le gouvernement fédéral pour favoriser l'apprentissage continu. Certains semblaient croire que ces programmes étaient destinés aux personnes dans des situations bien précises (p. ex., les prestataires de l'assurance-emploi, les personnes exerçant un métier spécialisé, etc.). Lorsque l'animateur a présenté un nouveau concept d'aide financière pour l'apprentissage continu, la plupart des participants se sont entendus pour dire que le concept était pertinent et que tous les Canadiens devraient être admissibles. De plus, certains étaient d'avis que le programme devrait surtout venir en aide à ceux qui en ont le plus besoin, comme les chômeurs ou les travailleurs sous employés, et les personnes qui n'ont pas les moyens de suivre une formation.

Compétitivité des entreprises

Pour la plupart des participants, être « compétitif à l'échelle mondiale » signifie être en mesure de vendre des produits et des services à l'étranger parce qu'il est avantageux de le faire, soit en raison du prix ou de la qualité des produits et des services, ou parce que l'entreprise répond à un besoin que personne d'autre n'a encore comblé. Autrement dit, l'entreprise tire son avantage concurrentiel de son innovation.

De nombreux participants ont exprimé leur appui au gouvernement fédéral afin qu'il aide les entreprises canadiennes à devenir ou à demeurer compétitives à l'échelle mondiale. Plusieurs mesures pourraient être prises à cet égard pour :

- négocier des accords commerciaux favorables ;
- encourager l'innovation au Canada ;
- offrir un soutien financier pour favoriser la croissance des entreprises canadiennes (p. ex., des réductions d'impôt, des subventions, etc.) ;
- organiser des missions commerciales ;
- aider les entreprises canadiennes à trouver des débouchés à l'étranger ;
- attirer les talents qu'il nous faut au Canada ;
- soutenir l'enseignement postsecondaire pour stimuler l'innovation.

Stratégie fiscale

La plupart des participants ont reconnu ou simplement supposé que le gouvernement fédéral affiche un déficit. Même si un nombre important de Canadiens se sont montrés plutôt indifférents, ils sont plus nombreux à croire qu'il serait important que le déficit n'augmente pas. Selon eux, cela ne signifie pas pour autant qu'il faut équilibrer le budget du jour au lendemain, mais il faut au moins établir un plan.

Les participants devaient s'exprimer sur les compromis à faire en accumulant un déficit pour investir dans les programmes et l'infrastructure, plutôt que d'équilibrer le budget en coupant dans certains programmes ou en augmentant les impôts. Cet exercice a révélé un appui pour le concept de déficit productif en investissant dans les programmes et l'infrastructure afin d'obtenir un rendement plus élevé pour l'avenir. Certains participants savaient que c'était la stratégie qui avait été adoptée au cours des dernières années, mais ils n'étaient pas convaincus qu'elle avait produit les résultats escomptés ou du moins, ils ne les avaient pas encore constatés. D'autres participants étaient inquiets à l'idée que si le pays accusait un déficit en temps de prospérité économique, comme cela semble être le cas en ce moment, celui-ci serait d'autant plus important en période économique plus instable.

Au sujet des impôts, presque tous s'accordaient pour dire que les taux d'imposition du gouvernement fédéral étaient demeurés stables au cours des dernières années.

Changement climatique et tarification de la pollution

La plupart du temps, l'expression « mettre un prix sur la pollution » signifie imposer des frais aux pollueurs.

En ce qui concerne les actions spécifiques, peu de participants avaient entendu parler des mesures prises par le gouvernement fédéral pour lutter contre le changement climatique. En se basant sur un aperçu général du plan gouvernemental qui vise à imposer un prix national sur la pollution par le carbone, les participants ont hésité à dire si le gouvernement devait ou non adopter cette mesure. Bien qu'environ la moitié des participants croient fermement qu'il est nécessaire de lutter contre le changement climatique, certains n'étaient pas convaincus de l'efficacité de la mesure proposée. Ils avaient l'impression que les coûts seraient refilés aux consommateurs et que plusieurs auraient encore plus de difficulté à joindre les deux bouts, ou que la mesure serait perçue comme un permis de polluer pour les industries.

Bien qu'ils aient apprécié l'idée de verser les revenus générés par ce plan aux provinces et aux territoires d'où proviennent les émissions, les participants auraient préféré que ces provinces et territoires puissent utiliser ces revenus comme bon leur semble. Plusieurs souhaitent qu'on réinvestisse ces sommes pour lutter contre le changement climatique. Si tel était le cas, ils seraient plus nombreux à appuyer un plan national de tarification de la pollution par le carbone.

Sommaire des résultats – Sondage

Priorités du gouvernement fédéral

Lorsqu'invités à décrire spontanément les problèmes sur lesquels le gouvernement fédéral devrait se concentrer, la majorité des répondants ont mentionné l'économie et les emplois. D'autres ont répondu l'environnement, les soins de santé et les enjeux sociaux en général.

Évaluation de l'économie

Les répondants devaient évaluer la situation économique du Canada, des États-Unis et de leurs provinces et territoires respectifs. Dans une proportion similaire (soit plus du tiers des répondants), on a estimé que toutes ces économies se portent bien. Les évaluations « neutres » étaient moins élevées à l'endroit de l'économie américaine. Cependant, ils étaient plus nombreux à être incertains de la note à lui accorder. Invités à évaluer le prix actuel de l'essence, plus de la moitié des répondants ont donné une note défavorable, comparativement à 14 % qui ont donné une note favorable.

Pour ce qui est de l'inquiétude des Canadiens à l'idée de perdre leur emploi ou de voir un proche perdre son emploi au cours des six prochains mois, 22 % des répondants ont dit être très préoccupés, 11 % étaient plutôt préoccupés et 59 % n'étaient pas très préoccupés.

Confiance envers l'économie

Nous avons demandé aux répondants d'évaluer l'impact de divers facteurs, tendances et mesures sur l'économie. La moitié d'entre eux devaient évaluer l'impact de ces facteurs sur la création d'emplois, et l'autre, sur la compétitivité des entreprises canadiennes.

Dans le premier groupe (création d'emplois), les répondants ont conclu que c'étaient les investissements du gouvernement fédéral dans le domaine des sciences, de la technologie et de l'innovation qui avaient le plus grand impact (59 %), suivi de l'ALENA (58 %), des investissements du gouvernement fédéral dans l'infrastructure (56 %) et des accords commerciaux avec les pays autres que les États-Unis (56 %).

Dans le deuxième groupe (compétitivité des entreprises canadiennes), les résultats étaient sensiblement les mêmes. Au premier rang, on retrouve les accords commerciaux avec les pays autres que les États-Unis (59 %), suivi des investissements du gouvernement fédéral dans le domaine des sciences, de la technologie et de l'innovation (57 %) et l'ALENA (57 %).

Situation budgétaire

Tous les répondants devaient donner leurs impressions de l'état des finances du gouvernement fédéral. Plus des trois quarts croyaient que le gouvernement fédéral affiche un déficit budgétaire, alors qu'un peu plus d'un dixième croient que le budget est équilibré et 6 %, qu'il y a un surplus budgétaire. Pour ce qui est de l'évolution du déficit fédéral au cours des prochaines années, 66 % étaient d'avis qu'il irait en augmentant, 22 % ont répondu qu'il demeurerait stable et 9 % s'attendaient à ce qu'il diminue.

Priorités budgétaires

Les répondants ont évalué l'importance de plusieurs enjeux et priorités dans les décisions du gouvernement fédéral en matière de budget. Plus des trois quarts ont répondu qu'il était très important que le gouvernement fédéral tienne compte de la création d'emplois et des compétences professionnelles dans ses décisions budgétaires. Les trois quarts ont dit qu'il était très important que le gouvernement fédéral tienne compte de la classe moyenne (75 %) et de l'environnement (74 %). Pour près de 7 répondants sur 10, il est très important que le gouvernement fédéral démontre une volonté d'accroître la compétitivité des entreprises canadiennes à l'international, d'équilibrer le budget, de favoriser l'innovation, de réduire ou maintenir le déficit, d'aider les femmes et les jeunes filles et de mettre l'accent sur la science et la compétitivité des entreprises. Environ les deux tiers des répondants estiment qu'il est important pour le gouvernement fédéral d'inclure l'égalité des sexes, l'aide aux Autochtones et le féminisme parmi ses priorités.

Invités à choisir parmi deux scénarios budgétaires, plus des deux tiers des répondants ont préféré celui dans lequel le gouvernement fédéral investit dans les programmes et les infrastructures susceptibles de créer des emplois et de stimuler la croissance économique, même s'il doit pour cela afficher un déficit. Un peu plus du quart des répondants ont préféré le scénario dans lequel le gouvernement fédéral s'efforce d'équilibrer le budget, même s'il doit couper dans les programmes ou augmenter les impôts.

Impressions des tendances en matière d'impôts et d'aide financière

Nous avons demandé aux Canadiens si les impôts fédéraux étaient à la hausse ou à la baisse, et si l'aide financière qui leur est offerte par le gouvernement fédéral avait augmenté ou diminué (le premier scénario a été présenté à la moitié des répondants et le deuxième, à l'autre moitié).

En ce qui concerne les impôts fédéraux, 48 % des répondants avaient l'impression qu'ils avaient augmentés au cours des dernières années, 38 % étaient d'avis qu'ils étaient demeurés stables et 7 %, qu'ils avaient augmentés. Pour ce qui est de l'aide financière offerte aux Canadiens par le gouvernement fédéral, 28 % avaient l'impression qu'elle avait augmentée, 36 % étaient d'avis qu'elle était demeurée stable et 29 %, qu'elle avait diminuée.

En dernier lieu, quatre scénarios financiers ont été proposés aux répondants. Nous leur avons demandé s'ils disposaient de 20 $, 50 $, 100 $ ou 500 $ de plus par mois, quel serait l'impact sur leur situation financière personnelle. Un peu moins d'un dixième des répondants ont répondu qu'un montant supplémentaire de 20 $ ou 50 $ par mois aurait un impact majeur sur leurs finances personnelles alors qu'un sur cinq a admis que 100 $ de plus par mois aurait un impact majeur. Pour plus de la moitié des répondants, 500 $ de plus par mois aurait un impact majeur.

Des scénarios différents ont été présentés à un autre groupe, avec des montants calculés sur une base annuelle plutôt que mensuelle (240 $, 600 $, 1 200 $ et 6 000 $ par année). Un peu moins d'un dixième des répondants ont indiqué que des montants additionnels de 240 $ et 600 $ par année auraient un impact majeur sur leurs finances personnelles, alors que 29 % étaient d'avis que 1 200 $ de plus par année aurait un impact majeur. Pour près des deux tiers des répondants, 6 000 $ de plus par année aurait un impact majeur.

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Detailed Results

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 Budget 2018, 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 government actions and the state of the economy.

Therefore, Finance Canada has 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.

Focus Group Research Findings

General Views on the Performance of the Federal Government

At the beginning of each session, participants were asked to write down the most important thing the federal government has been getting right over the past year and the most important thing they have been getting wrong.

Two issues were just as likely to land in the "going right" category as they were to land in the "going wrong" category.

- Opinions on how the federal government had been handling **immigration** were split. Those who felt that this was an area the federal government had been getting right over the past year focused mostly on refugee settlement in general and on the federal government's overall philosophy towards immigration. In particular, participants appreciated the relatively more open and welcoming approach taken by Canada compared to other countries, notably the United States.

  Those who felt immigration was an area the federal government had been getting wrong over the past year seemed mostly concerned with the number of cross-border asylum seekers and how their influx was being managed.

- Opinions on how the federal government had been handling **the legalization of cannabis** were also split. Those who felt that this was an area the federal government had been getting right over the past year were generally supportive of the measure and felt it was long overdue.

  Those who felt legalization of cannabis was an area the federal government had been getting wrong over the past year were either outright opposed to the measure or they were concerned that legalization was happening too quickly and not enough had been done to prepare citizens, including education.

Among the remaining areas that participants felt the federal government had been **getting right** over the past year, the following surfaced as some of the more common themes:

- Participants liked the federal government's approach to the **NAFTA negotiations**, both in terms of tariff tactics and counter-measures and in terms of tone.
- A variety of measures were mentioned across all the sessions that could broadly be grouped under **general socio-economic policy.** Measures mentioned included better child benefits, lower taxes, longer parental leave, a focus on gender equality and support for LGBTQ.

Other areas the federal government has been getting right but mentioned <u>by only a few participants</u> across all sessions included:

- Managing the Saudi Arabia issue;
- International aid;
- Some participants were confusing measures taken by provincial governments with respect to healthcare and education with the role the federal government plays in these areas. Examples would include: contributing to the education and healthcare systems in general; education for low income families; making sure the healthcare system does not get worse;
- More support and consultations with First Nations;
- Trade agreements – finding new ways to sell Canadian goods and services;
- Investing in infrastructure / Upgrading and renovating government buildings;
- Addressing climate change;
- The Prime Minister is doing town hall sessions / public consultations / gauging public opinion;
- Conciliatory approach to groups that have been wronged in the past; and,
- Improving Canada's image on the international stage.

Beyond immigration and cannabis legalization, other common areas that participants felt the federal government had been **getting wrong** over the past year included:

- **The federal government approach to the pipeline issue**, especially the recent purchase of the TransMountain pipeline. Participants were either dissatisfied that they had made the purchase in the first place or they were dissatisfied that not enough had been done to make sure the project happened.
- Some measures were seen as **anti-small business**, including what some saw as increasing taxes on small businesses, not doing enough to support small businesses, and in a few rare instances, there were references to specific measures like income sprinkling.
- The federal government is not seen as fulfilling its environmental mandate or not doing enough for **the environment** in general. A few specifically referred to not adequately supporting green energy initiatives and not doing enough to address climate change.

Other areas the federal government has been getting wrong but mentioned <u>by only a few participants</u> across all sessions included:

- Phoenix pay system;
- Gas prices;
- Need to improve public transportation;
- Not being able to close negotiations on NAFTA;
- Too much violence / crime / Too much poverty;
- Not enough getting done in general / Unfulfilled platform promises;
- No Pharmacare in place yet;
- Addressing the fentanyl crisis;
- Inefficient tax system;
- Lack of funding for seniors and children;
- Managing interprovincial relations;
- Managing the national debt; and,
- Tarnishing Canada’s image abroad, e.g. the trip to India.

Views on the Economy in General

Most participants would describe the Canadian economy as either "stable" or performing fairly well. Only a small number would say that it is struggling or headed in the wrong direction. Some of those sensing the economy was not performing well explained that the economy was not working well for them personally rather than the economy not working well in general. More specifically, an increasing cost of living and an unaffordable housing market were both seen as indicators that the economy was not performing well, whereas these indicators typically suggest a strong economy overall in the Canadian context.

Participants typically looked at broad economic indicators like employment (or the unemployment rate) to gauge the status of the economy, or they would look at their own economic situation, including cost of living, housing affordability and the disconnect between salaries and inflation.

Admittedly, assessing the overall Canadian economy was difficult for many so they tended to describe their regional or provincial economy instead. Some regional highlights from this discussion included the following:

- In **Moncton**, participants felt the economy was performing moderately well. On the one hand, employment rates were seen as decent and the minimum wage had been increased. On the other hand however, participants were concerned that many of the jobs were low paying and precarious, that inflation was persistent and that salaries in general were not keeping pace with inflation.
- In **Toronto**, the high cost of living and of housing dominated the discussion, especially in the low to middle income group, where participants tended to feel the current economy was a struggle. The higher income group was generally more positive about the state of the economy by referring to indicators such as full employment, robust consumer activity in general (e.g. people shopping, nice cars, etc.), robust commercial property activity, and high levels of construction activity.
- In **Calgary**, there were still side-effects of the recent provincial economic downturn, although participants in the higher income group seemed to feel that the situation had been improving compared to the same time a year ago. Low- and middle-income participants explained how their economy was still struggling, that those employed were still living pay cheque to pay cheque and that a household cannot get by on just one income (or just one job).
- In **Vancouver**, the general sense was that the economy was doing well as seen by low unemployment, lots of job fairs, and increasing interest rates. However, this was largely being offset by the high price of housing, by inflation in everyday consumables, and the growing gap between the cost of living and wages.

- In **Quebec City**, participants were fairly united in their view that the local economy was doing very well. They largely based this assessment on the low level of unemployment, on robust construction activity in the region and the fact that, despite increases in the price of housing, demand remains strong.

Compared to last year, most participants felt the economy had been stable. Those more likely to feel the economy had improved compared to a year ago included high income earners in Calgary and low/middle-income earners in Quebec City. Those feeling the economy had worsened compared to a year ago, a sentiment particularly common among low/middle-income earners in Toronto, based this mostly on the fact that inflation was making it more challenging for them, those who cannot afford a home in the city now need to travel further to work, and consumer debt levels had worsened.

Moving forward, most believed the economy will remain fairly stable although most also agreed that the country's prospects largely depend on the outcome of the NAFTA trade negotiations (negotiations that were ongoing at the time of the research). Other economic concerns for the next year included rising interest rates that will challenge Canadians with lots of debt, the continuing gap between inflation and wages, and automation putting people out of work.

Challenges Facing the Canadian Economy

When asked to identify the biggest challenges facing the economy these days, negotiating NAFTA, or the lack of a trade deal with the United States, was by far the most common theme raised. Along the same lines, participants referred to recent tariffs on Canadian products and the current relationship with the United States as related challenges for the national economy.

A wide variety of other challenges were listed by participants, most of which fall into one of the following broad themes:

<table>
<tr><td>LABOUR</td><td>Participants referred to a variety of labour-related challenges, most of which involved a shortage, including a lack of trades, a lack of skilled labour and one specific reference to a shortage of talent in renewable energy and artificial intelligence. Some felt there was just a natural gap in labour while others felt that the aging population was an important contributing factor to this shortage.

A few referred to a disconnect between education opportunities/programs and the growing demand for certain skills while another felt that automation will displace many jobs, prompting them to suggest that job creation will need to be a priority to offset these job losses.</td></tr>
<tr><td>DEBT</td><td>Some felt that growing consumer debt will stifle economic growth moving forward as increasing interest rates force Canadians to focus on debt management and less on purchasing. A few others were concerned that the growing national debt will be a challenge for the economy.</td></tr>
<tr><td>SOCIO-ECONOMIC CHALLENGES</td><td>A variety of socio-economic challenges were proposed, with a focus on the following:
the costs related to an aging population (in terms of healthcare, CPP, OAS and other related social services), and,
the need for more spots or more affordable child care so that a parent to go back to work.
Other socio-economic challenges listed included concerns with regional inequality across the country, the high cost of living, the high cost of housing, taxes and being able to integrate and resettle “the large number of immigrants arriving.”</td></tr>
<tr><td>ECONOMIC DIVERSIFICATION</td><td>Some participants were concerned about the lack of diversification in the Canadian economy. More specifically, a few felt the economy was overly reliant on oil or the oil sands, that there was not enough sectoral diversity in general in our economy, that the country had too few trade partners and that there was a lack of innovation in general.</td></tr>
<tr><td>ENVIRONMENT</td><td>A few participants mentioned that global warming or climate change will pose a challenge to the national economy as various environmental catastrophes (e.g. like the fires in British Columbia) take their toll.</td></tr>
</table>

Trade Negotiations

At the time these focus groups were taking place, NAFTA negotiations were ongoing between Canada, the United States and Mexico. Participant awareness of these negotiations was quite high although not all participants could speak to the finer details of the deliberations. Participants did argue however that very little information was being made available about what was happening since the negotiations were largely a closed-door affair.

In terms of what was known about the negotiations, many seemed aware of where things stood in the negotiations including the fact that various tariffs and counter-tariffs had been imposed by both the U.S. and Canada and that the dairy industry and supply management were a main issue. Many named Canada's Minister of Foreign Affairs by name in their comments and many also knew that the U.S. had come to bilateral terms with Mexico.

Discussing the negotiations also sparked positive and negative emotions among some participants. Emotions were entirely negative towards the negotiation tactics and rhetoric being used by the U.S. administration. A few were not convinced Canada was doing a good job of the negotiations, however this was not the most common view - most were feeling good about how Canada had been approaching the negotiations, both in terms of tact and in terms of tariff strategies. Most also believed Canada was not just doing its best but that it was also holding its own in the negotiations.

Participants generally believed that these negotiations mattered to them and to the country. Few, if any, argued that Canada would be better off outside a NAFTA deal. Much to the contrary, most would probably agree that Canada would be worse off if no deal were to be struck, even if a good number of respondents could not make a direct connection between a NAFTA deal and their own personal economic reality. Most seemed to believe that this deal is important for the country overall.

- Among those who could connect with the outcome of the negotiations, many explained that if Canada were not part of a North American pact, that they would pay more for certain products (e.g. automobiles) and a few explained that some products might no longer be available to Canadian consumers.
- There was moderate awareness of the possible U.S. tariffs on the automobile industry and many appreciated that if these were to be applied, the automobile industry in Ontario specifically would suffer. Awareness of these tariffs was low in Toronto.

Trans Mountain Expansion Project

Participants were asked what they had heard, if anything, about the TransMountain expansion Project. It is important to note that the discussion did not explicitly explore who supported and who opposed the project, it focused more on what participants knew or did not know about the project. Awareness of the project purchase was limited and understanding of the issues and underlying reasoning behind the purchase was quite superficial. Awareness was higher in Calgary, Vancouver and Quebec City compared to Toronto and Moncton.

Very few felt comfortable providing an explanation for the purchase, with many in this narrow group believing the federal government needed to proceed with the purchase in order for the project to actually happen, either because the private sector was going to pull out, or because this was the only way to over-rule objections in British Columbia. Some had also heard that the purchase was necessary because the federal government felt it was important to get Canadian oil to tidewater and that this project was important for the Canadian economy: *"Sounds like the project falling through altogether would have been a blow to our economy so it sounded like our government had to step in."*

A small number of participants seemed familiar with the recent court ruling putting a halt to the project. Despite this recent setback in the courts, most participants familiar with the project believed it will get built.

In each session, the moderator gauged awareness and understanding of specific aspects of the TransMountain expansion project. Feedback revealed that there is very little knowledge of the economic facts surrounding this project. For instance, there was next to no awareness that the purchase included the acquisition of an existing pipeline that is generating profits. There was also very low awareness that the expansion involves a pipeline twinning and not an entirely new pipeline.

The moderator also explored in each session two possible economic benefits of transporting oil to tidewater rather than southwards to the United States. Here again, participant knowledge and understanding of the complete economic picture was very weak. More specifically, there was very limited knowledge that Canadian crude oil would sell at a better price if exported to international markets other than the United States. Participants were also unaware of the extent to which current oil exports are oriented to the United States and that having a pipeline to tidewater would help diversify the country's export partners and reduce its dependency on the United States as a buyer.

- As part of this discussion, the moderator asked participants to guess the proportion of Canadian oil exports currently going to the United States. Participants significantly underestimated this proportion, and many were taken aback by the fact that it is roughly 99%. In light of the ongoing negotiations with the United States, the argument of reducing the country's dependency on that trade partner particularly resonated with participants.

The views of a good number of participants changed once they were provided all the details regarding the project. One participant in Quebec City made a point of explaining that he would have appreciated if more of this type of information had been provided to him because all he hears in the media are the reasons for not going ahead with the project.

In the end, participants who continued to oppose the project seemed to object in principle rather than objecting to anything specific or unique about the TransMountain Expansion Project. These participants generally believed that the country should be moving away from non-renewable energy, and that the federal government should not be investing in pipelines when it was said to be so committed to the environment. A few also objected to the idea that public funds were used to purchase a project that should have remained, in their opinion, in the private sector. If the private sector saw the project as too risky, then public funds should not be exposed to such risk either.

Labour Supply, Skills and Talent

This research explored two aspects of labour in Canada – whether there are enough workers for the positions available, and, whether the country's workforce has the right talent and skills to meet the needs of today's economy.

Labour Supply

Participants were somewhat torn as to whether Canada had enough workers. Participants were more likely to believe that there were shortages in specific sectors and industries and in certain broad types of jobs than believe there was a generalized shortage or abundance of labour. Some of the more common areas where shortages were noted included restaurant jobs, hotel/tourism, trades, "hard labour", low-paying jobs, and jobs in technology and healthcare-related fields.

- Participants in Calgary were one of the only ones to explain that there are still many important sectors laying people off, including government, oil and gas, and that there remains a general over-supply of labour.

Participants provided some explanations for the specific gaps:

- Some believe there are not enough workers in low-paying or what are deemed "hard labour" jobs because Canadians, especially younger Canadians, are not interested in these types of jobs. Some also explained that the wages for many of these positions are too low and participants, especially those in Vancouver, believe this is a leading reason why nobody wants those positions. They argue that someone doing that kind of work cannot afford to live in their city.

- Some also proposed that there simply were not enough people around to fill certain types of positions. This seemed to be the main explanation for gaps in skilled trades and in sectors like technology and healthcare.

Over time, participants did not foresee any improvement in this situation – if anything, the gaps would grow over time. A few trends that were seen as contributing to these gaps over time included an aging population / Canadians are having fewer children, the significant amount of baby boomers exiting the workforce and high levels of immigration.

In almost every session, a participant raised the impact of automation and artificial intelligence (AI) on labour supply. Most of these discussions resulted in participants believing that automation and AI is more likely to put Canadians out of work rather than create new employment opportunities.

When it comes to addressing labour supply issues, the federal government was seen as potentially playing an important role on two specific fronts:

- Many participants admit that **immigration** is a big part of the solution and that the federal government should be involved in two ways when it comes to addressing labour gaps. First, it could be doing more to target and orient newcomers into specific fields where there are important gaps. Secondly, the federal government could work harder to foster and develop the potential of immigrants already established in Canada by helping them get their foreign credentials and experience recognized. Participants explained that there are too many immigrants in Canada who were trained in specific trades and professions abroad but for whatever reasons are not working in that field in Canada, are unemployed or are underemployed.
- Participants also believe the federal government could work closer with **post-secondary** institutions to develop programs that will align with what the economy of tomorrow will need. They could also work closer with high school graduates to help them better assess and fill the labour gaps of today and of tomorrow.

Skills and Talent

Discussing the importance of retraining, upgrading or updating their skills was something to which nearly all participants could relate. Some were already going through their second or third careers, many were required to update their knowledge or skills as part of their job, and a few had recently gone through training or taken courses.

"Doing this does not improve my standard of living, rather it keeps it the same. It is necessary to do this to keep afloat."

Those who felt they could easily accomplish this sort of training explained that they were able to do it at work, often as part of their job. For these individuals, their employer paid them to take training and gave them the time off to do it. Others explained that their training consisted largely of "learning on the job" and did not involve them having to take time off or pay anything.

This was not the case for all participants. Even those who did not encounter any challenges when it comes to training or upgrading could appreciate that there can be several challenges for others or if they suddenly did not have this sort of support. These challenges tended to be consistent from session to session and irrespective of age or life stage – they included:

- not having enough time – training needs to happen on their personal time or there is no time in their schedule to take advantage of training available at work,
- having to forego income to take training or still having to make ends meet to take training, and,
- the cost of courses.

A few additional challenges mentioned by a few participants included a shortage of training programs (or the wait lists for those available are too long) and their own age discouraged them from taking on more training seeing how close they are to retirement.

When asked what the federal government could do, it was not uncommon for participants to propose a program that resembled the type of lifelong learning financial support already being considered by the federal government.

Other suggestions proposed included state-funded post-secondary education, capping tuition rates, paying for textbooks, developing programs specifically for mature students, and developing resources to help Canadians understand what jobs are in demand and what the labour force trends are.

There was spotty awareness of support already available from the federal government. Participants seemed to believe that current programs were reserved for individuals in specific situations (e.g. on EI, in the trades, etc.) or participants were reminded of programs offered at the provincial level (e.g. Second Career in Ontario, programs through Emploi Quebec).

When the moderator presented the concept of a new financial support for lifelong learning, most participants agreed that this would be relevant and timely. While many would like tuition to be paid, there was equal support for a temporary source of "income" while they are on training or more widely available "bursaries and grants" to assist with paying tuition fees.

If a new form of support were to be introduced, support was highest for the broadest level of eligibility: all Canadians. This support was rooted in two beliefs:

- It makes no sense for the program to be means-tested because if someone lost their job through attrition or obsolescence, their income is effectively zero today even if they were a high-income earner the year, month, or week before.
- Investment in helping someone get a job or get a better paying job will see a return on investment in the form of income and consumption taxes that exceeds the cost of that initial investment.

That being said, some would like the program to provide support where support is needed the most, such as those who are unemployed or underemployed and those who can the least afford training. There was also some support for the idea that the training received should be for the type of job or position that is in demand and that the training not just be for the sake of it or for fun.

Business Competitiveness

The focus groups involved an exercise in terminology interpretation related to business competitiveness. For most participants, to be "globally competitive" means being able to sell products and services in other countries because of a price advantage, a quality advantage or because the business is meeting a need that is not being met by anyone else. In other words, the business derives its competitive edge through innovation.

There is strong support for the federal government playing a role in helping Canadian businesses become or remain globally competitive. A wide range of roles and activities were proposed, including:

- Negotiating favourable trade agreements,
- Stimulating innovation in Canada, for instance by investing in research and development,
- Help develop areas of expertise and specializations in Canada that can then be exported,
- Providing financial support to help Canadian companies grow (e.g. taxes, subsidies, etc.),
- Coordinating trade missions,
- Helping Canadian businesses identify opportunities abroad,
- Support businesses that want to export, especially small businesses,

- Attracting the right kind of talent into Canada, and,
- Supporting post-secondary education (e.g. through bursaries) to stimulate innovation.

General Fiscal Strategy

Participants were asked whether the federal government is operating with a budget deficit or surplus or if the budget is balanced. Most recognized, or just assumed, that the federal government was operating with a deficit.

There was an important contingent of Canadians who were indifferent about this situation. They did not believe that budget deficits had any impact on their daily lives and again, many assumed that governments always have and always will operate with a budget deficit. There is however a larger contingent that believed, often on principle, that it would be important that the deficit not increase. This did not necessarily translate into a need for a balanced budget overnight but at a minimum, these participants believed there needs to be a plan to work back towards equilibrium. The desire to get back to a balanced budget was most common in Calgary.

Participants were asked how they generally feel about the trade-off of running deficits to invest in programs and infrastructure versus balancing the budget which means making cuts and/or raising taxes. This exercise revealed support for a productive deficit that invests in programs and infrastructure to generate greater future returns. The challenge for some was that they are aware that this has been the strategy over recent years and that they are not convinced it has produced the desired outcomes, or at least they had not seen them yet. There were also concerns that if the country was running deficits during "good times," which most believed we were living these days, the country will see even larger deficits if the economy takes a turn for the worse.

On the topic of taxes, participants were asked whether they felt federal government taxes had been going up, going down, or staying the same in recent years. Nearly all participants believed federal government taxes had stayed the same in recent years.

Climate Change and Pollution Pricing

The focus groups involved an exercise in terminology interpretation related to pollution pricing. "Putting a price on pollution" or "putting a cost on pollution" more often than not meant charging a fee to those who pollute – in other words it reminded participants of the polluter pays principle. A few participants were reminded of what they called a "carbon tax" and a few were also reminded of the broader price paid by society because of pollution, such as higher healthcare costs, higher environmental remediation costs, etc.

Few participants were aware of any steps taken by the federal government to address climate change. A few did mention a “carbon tax” and a few also recalled signing the Paris Agreement.

Based on a high-level overview of the federal government’s plan to have a national price on carbon pollution, participants were torn when it came to whether the federal government should impose a national price on carbon pollution. While nearly all participants felt strongly that climate change needed to be addressed, some were not convinced that a price on carbon would be effective, or they could not see the direct link between a price on carbon and reducing GHG emissions. They either believed that the costs would just be passed down to consumers, further aggravating cost-of-living challenges faced by many, or the measure was simply seen as a license for industry to pollute.

While participants liked that the revenues from the plan are returned to the source provinces and territories, they did not like that these same provinces and territories could do what they wanted with the revenues. There was very strong support for these funds being reinvested into addressing climate change – for instance investing in environment-related research and development, developing renewable sources of energy, incenting polluting industries to reduce their emissions, etc. If this were the case, then there would be broader support for a national price on carbon pollution.

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 Federal Government

When asked to identify, unaided, the one issue respondents believe the federal government should focus on, the most common theme is the economy and jobs (as noted by 24%) of respondents. The next most common themes include the environment (12%), healthcare (7%) and social issues in general (6%).

ISSUES FEDERAL GOVERNMENT SHOULD FOCUS ON (TOP PRIORITY)						
		Gender		Age Group		
	Total (n=2,000)	Men (n=1,002)	Women (n=998)	18-34 (n=500)	35-54 (n=750)	55+ (n=740)
Economy/jobs	24%	28%	21%	16%	24%	31%
Economy / economic issues	*21%*	*25%*	*16%*	*13%*	*20%*	*27%*
Jobs / unemployment issues	*4%*	*3%*	*4%*	*3%*	*4%*	*4%*
Environment	12%	10%	13%	12%	13%	10%
Environmental issues	*9%*	*8%*	*11%*	*10%*	*10%*	*8%*
Climate change / global warming	*2%*	*2%*	*2%*	*3%*	*3%*	*2%*
Healthcare / hospitals	7%	4%	10%	5%	8%	7%
Social issues (general)	6%	5%	6%	7%	5%	5%
Government representation / accountability	5%	6%	4%	3%	6%	4%
Energy / oil and gas issues / pipelines	5%	6%	4%	6%	4%	5%
Immigration / refugees	5%	6%	5%	3%	5%	7%
Crime / national security	4%	4%	5%	4%	5%	3%
Education / schools	3%	2%	4%	5%	4%	1%
Affordable housing / housing issues	2%	2%	2%	3%	3%	1%
Government spending / budget / deficit	2%	3%	1%	1%	2%	2%
Taxes	2%	2%	2%	2%	2%	2%
Homelessness / poverty	2%	2%	3%	1%	3%	3%
Aboriginal issues	2%	1%	2%	2%	2%	1%
Seniors issues	2%	2%	3%	1%	1%	5%
Infrastructure / roads	1%	1%	1%	2%	<1%	<1%
Cost of living / debt / bills	1%	2%	1%	2%	2%	1%
Income disparity / minimum wage	1%	1%	1%	1%	1%	1%
Carbon tax	<1%	<1%	<1%	<1%	-	<1%
Other	1%	1%	1%	1%	1%	1%
Don't know/Refused	13%	13%	13%	22%	10%	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. All sample sizes are unweighted numbers and all percentages are weighted results.

ISSUES FEDERAL GOVERNMENT SHOULD FOCUS ON (TOP PRIORITY)							
		Region					
	Total (n=2,000)	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK/NU (n=200)	AB/NWT (n=200)	BC/YK (n=300)
Economy/jobs	24%	26%	21%	27%	23%	25%	22%
Economy / economic issues	*21%*	*21%*	*18%*	*22%*	*20%*	*21%*	*20%*
Jobs / unemployment issues	*4%*	*6%*	*3%*	*4%*	*4%*	*4%*	*2%*
Environment	12%	5%	25%	7%	3%	4%	15%
Environmental issues	*9%*	*4%*	*23%*	*5%*	*1%*	*3%*	*10%*
Climate change / global warming	*2%*	*1%*	*2%*	*2%*	*2%*	*1%*	*5%*
Healthcare / hospitals	7%	14%	9%	7%	6%	3%	5%
Social issues (general)	6%	5%	5%	7%	8%	5%	3%
Government representation / accountability	5%	6%	3%	5%	6%	7%	2%
Energy / oil and gas issues / pipelines	5%	4%	2%	3%	4%	20%	6%
Immigration / refugees	5%	4%	7%	5%	3%	4%	5%
Crime / national security	4%	2%	2%	6%	6%	1%	5%
Education / schools	3%	5%	4%	2%	3%	2%	3%
Affordable housing / housing issues	2%	1%	<1%	2%	1%	1%	8%
Government spending / budget / deficit	2%	2%	2%	2%	3%	4%	1%
Taxes	2%	2%	3%	1%	1%	1%	3%
Homelessness / poverty	2%	2%	1%	3%	6%	2%	3%
Aboriginal issues	2%	<1%	<1%	2%	1%	2%	2%
Seniors issues	2%	4%	2%	4%	1%	1%	1%
Infrastructure / roads	1%	<1%	<1%	2%	1%	-	<1%
Cost of living / debt / bills	1%	1%	<1%	2%	<1%	2%	1%
Income disparity / minimum wage	1%	1%	<1%	1%	-	-	2%
Carbon tax	<1%	-	-	-	1%	<1%	-
Other	1%	2%	1%	1%	1%	2%	1%
Don't know/Refused	13%	13%	14%	12%	18%	13%	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. All sample sizes are unweighted numbers and all percentages are weighted results.

The economy and jobs was a theme more common among men compared to women (28% vs. 21%), as well as respondents at least 35 years of age compared to younger respondents (28% vs. 16%). The environment was more likely to be mentioned by women than men (13% vs. 10%), as well as respondents in Quebec (25%), and British Columbia (15%). Women are also more likely to mention healthcare (10% vs. 4%), as are respondents in Atlantic Canada (14%).

When asked to identify, again unaided, any other issues they believe the federal government should focus on these days, the most common theme is again the economy and jobs (as noted by 15%) of respondents. Again, this theme was more common among men compared to women (17% vs. 13%).

Healthcare was also more common among women than men (12% vs. 7%), as well as respondents at least 55 years old compared to respondents under 35 (11% vs. 7%). Respondents in Quebec and Atlantic Canada are the most likely to have mentioned healthcare as another issue on which the federal government should focus (13% and 12% respectively).

SECONDARY ISSUES THE FEDERAL GOVERNMENT SHOULD FOCUS ON						
		Gender		Age Group		
	Total (n=1,774)	Men (n=891)	Women (n=883)	18-34 (n=403)	35-54 (n=686)	55+ (n=676)
Economy/jobs	15%	17%	13%	13%	16%	16%
Economy / economic issues	*12%*	*13%*	*10%*	*9%*	*12%*	*13%*
Jobs / unemployment issues	*4%*	*4%*	*4%*	*4%*	*5%*	*4%*
Healthcare / hospitals	9%	7%	12%	7%	9%	11%
Social issues (general)	8%	6%	9%	8%	7%	8%
Environment	7%	6%	7%	6%	7%	6%
Environmental issues	*6%*	*5%*	*6%*	*6%*	*6%*	*5%*
Climate change / global warming	*1%*	*1%*	*1%*	*<1%*	*1%*	*2%*
Education / schools	6%	5%	8%	9%	10%	2%
Government representation / accountability	6%	6%	6%	4%	5%	7%
Crime / national security	6%	6%	7%	5%	8%	6%
Immigration / refugees	6%	6%	6%	3%	7%	7%
Energy / oil and gas issues / pipelines	4%	5%	4%	1%	5%	6%
Infrastructure / roads	3%	2%	3%	4%	2%	2%
Government spending / budget / deficit	3%	2%	3%	2%	3%	3%
Taxes	3%	3%	2%	3%	3%	2%
Homelessness / poverty	3%	2%	3%	<1%	3%	4%
Aboriginal issues	3%	3%	4%	3%	4%	3%
Seniors issues	3%	2%	4%	<1%	2%	6%
Affordable housing / housing issues	2%	2%	3%	3%	2%	2%
Cost of living / debt / bills	2%	2%	1%	1%	3%	1%
Income disparity / minimum wage	2%	2%	2%	3%	2%	2%
Carbon tax	<1%	<1%	<1%	-	<1%	<1%
Other	1%	1%	1%	1%	1%	1%
Don't know/Refused	35%	37%	32%	42%	31%	33%

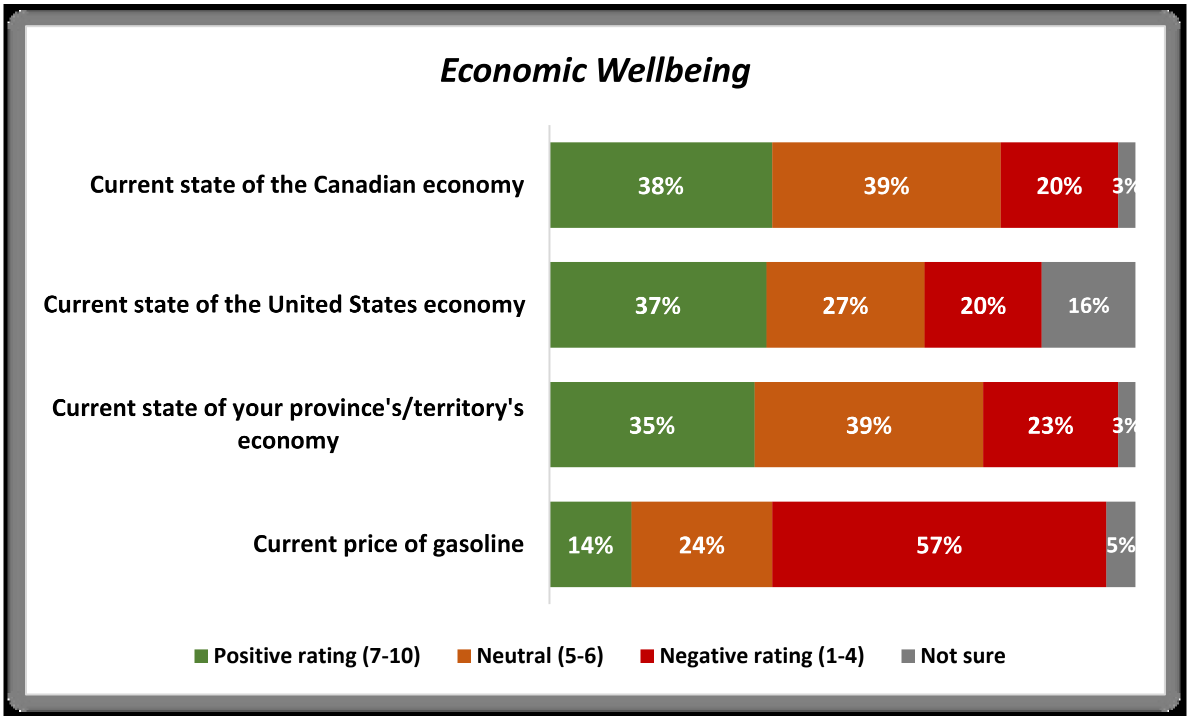
Q1B: Are there any others? Base: Respondents who provided a top priority in the previous question, n=1,774. All sample sizes are unweighted numbers and all percentages are weighted results.

SECONDARY ISSUES THE FEDERAL GOVERNMENT SHOULD FOCUS ON							
		Region					
	Total (n=1,774)	ATL (n=311)	QC (n=350)	ON (n=488)	MB/SK/NU (n=174)	AB/NWT (n=179)	BC/YK (n=272)
Economy/jobs	15%	17%	18%	15%	11%	14%	15%
Economy / economic issues	*12%*	*12%*	*17%*	*9%*	*10%*	*11%*	*11%*
Jobs / unemployment issues	*4%*	*6%*	*1%*	*6%*	*2%*	*3%*	*4%*
Healthcare / hospitals	9%	12%	13%	8%	5%	7%	7%
Social issues (general)	8%	8%	8%	8%	7%	5%	8%
Environment	7%	6%	11%	5%	2%	5%	7%
Environmental issues	*6%*	*5%*	*10%*	*4%*	*2%*	*5%*	*6%*
Climate change / global warming	*1%*	*2%*	*1%*	*1%*	*2%*	-	*2%*
Education / schools	6%	6%	8%	8%	3%	2%	3%
Government representation / accountability	6%	5%	4%	5%	8%	8%	8%
Crime / national security	6%	3%	3%	7%	11%	7%	8%
Immigration / refugees	6%	5%	6%	6%	6%	4%	6%
Energy / oil and gas issues / pipelines	4%	5%	1%	4%	4%	7%	7%
Infrastructure / roads	3%	1%	3%	4%	1%	1%	2%
Government spending / budget / deficit	3%	1%	3%	2%	2%	4%	5%
Taxes	3%	4%	2%	3%	3%	4%	2%
Homelessness / poverty	3%	2%	3%	2%	2%	3%	5%
Aboriginal issues	3%	2%	<1%	5%	5%	5%	3%
Seniors issues	3%	3%	5%	3%	2%	2%	2%
Affordable housing / housing issues	2%	<1%	1%	3%	2%	1%	7%
Cost of living / debt / bills	2%	2%	1%	2%	-	1%	3%
Income disparity / minimum wage	2%	2%	1%	3%	3%	2%	<1%
Carbon tax	<1%	<1%	-	<1%	1%	1%	-
Other	1%	1%	2%	<1%	-	1%	1%
Don't know/Refused	35%	39%	29%	36%	44%	34%	34%

Q1B: Are there any others? Base: Respondents who provided a top priority in the previous question, n=1,774. All sample sizes are unweighted numbers and all percentages are weighted results.

Assessment of the Economy

Survey respondents were asked to assess the current state of the Canadian economy, the U.S. economy and their province or territory's economy. Overall, similar proportions believe each of these economies is doing well (providing a rating of at least 7 on a 10-point scale). Neutral ratings for the U.S. economy are lower, however more respondents were "not sure" how to rate that particular economy. When specifically asked to rate the current price of gasoline, the majority of respondents (57%) provided a negative rating (a rating of 1 to 4) while 14% gave a positive rating.



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. All sample sizes are unweighted numbers and all percentages are weighted results.

Perceptions of the Canadian economy are very consistent between men and women. Women are slightly more likely to feel "neutral" about the current state of their province's or territory's economy and are less likely to provide a positive rating when it comes to the current state of the U.S. economy (27% vs. 48% among men). Sentiments towards the current price of gasoline are almost identical between men and women.

Alberta residents are the least likely to feel positive about the Canadian economy (18%), and, along with Atlantic Canada residents, are the least likely to feel positive about the current state of their province or territory's economy (18% and 19% respectively). Those most likely to feel negative about the current price of gasoline are respondents in British Columbia (70%), Alberta (62%), Quebec (61%) and Atlantic Canada (60%).

ECONOMIC WELLBEING						
		Gender		Age Group		
	Total (n=2,000)	Men (n=1,002)	Women (n=998)	18-34 (n=500)	35-54 (n=750)	55+ (n=740)
Current state of the Canadian economy						
Positive rating (7-10)	38%	39%	37%	42%	37%	36%
Neutral (5-6)	39%	38%	40%	35%	41%	41%
Negative rating (1-4)	20%	20%	20%	19%	18%	22%
Not sure	3%	2%	3%	4%	4%	1%
Current state of your province's/territory's economy						
Positive rating (7-10)	35%	37%	33%	38%	34%	34%
Neutral (5-6)	39%	36%	41%	38%	39%	39%
Negative rating (1-4)	23%	24%	23%	20%	24%	25%
Not sure	3%	4%	3%	4%	3%	3%
Current state of the United States economy						
Positive rating (7-10)	37%	48%	27%	35%	36%	40%
Neutral (5-6)	27%	24%	29%	29%	26%	26%
Negative rating (1-4)	20%	14%	25%	20%	19%	20%
Not sure	16%	13%	19%	15%	19%	14%
Current price of gasoline						
Positive rating (7-10)	14%	13%	14%	13%	14%	14%
Neutral (5-6)	24%	24%	24%	27%	22%	23%
Negative rating (1-4)	57%	59%	56%	54%	60%	57%
Not sure	5%	5%	5%	5%	4%	6%

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. All sample sizes are unweighted numbers and all percentages are weighted results.

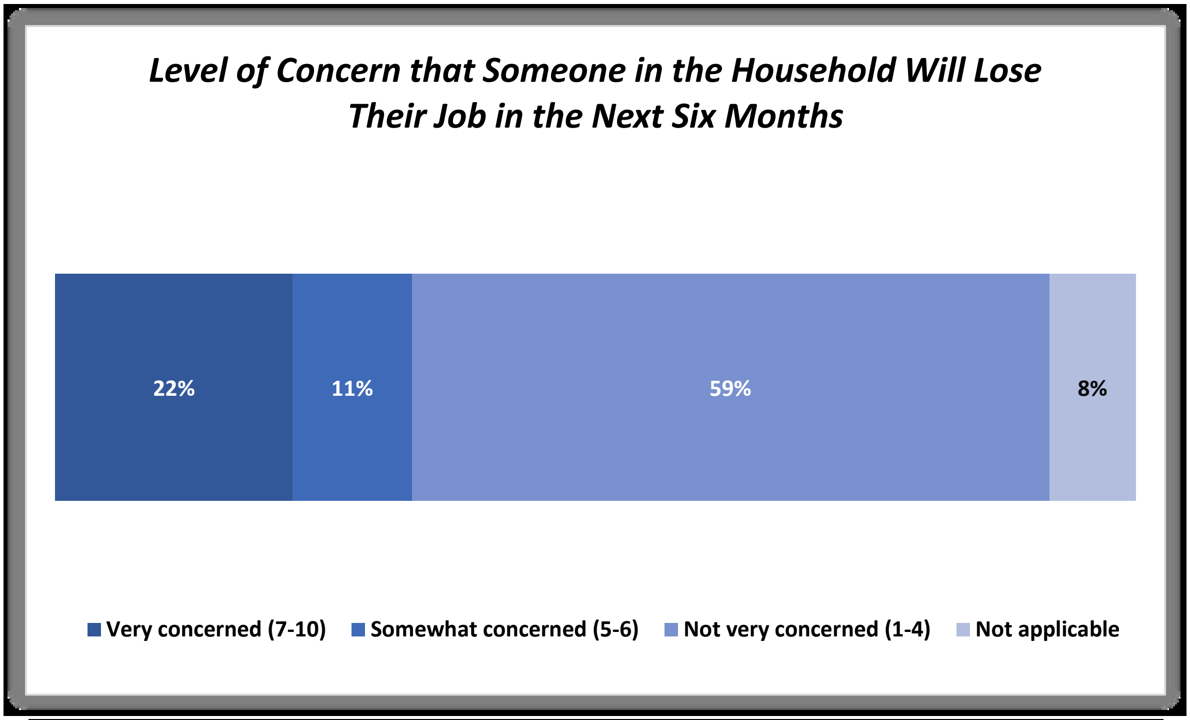
ECONOMIC WELLBEING							
		Region					
	Total (n=2,000)	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK/NU (n=200)	AB/NWT (n=200)	BC/YK (n=300)
Current state of the Canadian economy							
Positive rating (7-10)	38%	32%	46%	41%	30%	18%	40%
Neutral (5-6)	39%	43%	36%	39%	44%	37%	44%
Negative rating (1-4)	20%	23%	14%	18%	24%	41%	15%
Not sure	3%	2%	4%	3%	1%	4%	2%
Current state of your province's/territory's economy							
Positive rating (7-10)	35%	19%	46%	32%	37%	18%	43%
Neutral (5-6)	39%	33%	30%	45%	41%	35%	40%
Negative rating (1-4)	23%	46%	21%	19%	19%	42%	14%
Not sure	3%	2%	2%	4%	4%	4%	3%
Current state of the United States economy							
Positive rating (7-10)	37%	32%	39%	37%	40%	38%	37%
Neutral (5-6)	27%	25%	28%	26%	26%	24%	30%
Negative rating (1-4)	20%	24%	17%	22%	18%	19%	18%
Not sure	16%	19%	16%	15%	16%	20%	15%

ECONOMIC WELLBEING							
		Region					
	Total (n=2,000)	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK/NU (n=200)	AB/NWT (n=200)	BC/YK (n=300)
Current price of gasoline							
Positive rating (7-10)	14%	11%	13%	17%	19%	9%	8%
Neutral (5-6)	24%	25%	20%	28%	28%	25%	16%
Negative rating (1-4)	57%	60%	61%	50%	51%	62%	70%
Not sure	5%	3%	6%	6%	2%	4%	6%

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. All sample sizes are unweighted numbers and all percentages are weighted results.

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. Over one fifth (22%) of respondents feel very concerned (a rating of 7 to 10), 11% somewhat concerned (rating of 5 or 6), and 59% are not very concerned (rating 1 to 4).



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. All sample sizes are unweighted numbers and all percentages are weighted results.

Respondents 18 to 34 years old are more likely to be "very" concerned (29%) as are those 35 to 54 (23%), compared to those at least 55 years old (16%). This sentiment is also high among respondents in Alberta/Northwest Territories (30%), Ontario (26%), and Manitoba, Saskatchewan and Nunavut (23%).

JOB SECURITY						
		Gender		Age Group		
	Total (n=2,000)	Men (n=1,002)	Women (n=998)	18-34 (n=500)	35-54 (n=750)	55+ (n=740)
Level of concern that you or someone in your family may lose their job in next six months						
Very concerned (7-10)	22%	20%	23%	29%	23%	16%
Somewhat concerned (5-6)	11%	12%	10%	13%	13%	8%
Not very concerned (1-4)	59%	59%	59%	56%	63%	58%
Not applicable	8%	8%	8%	1%	1%	18%

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. All sample sizes are unweighted numbers and all percentages are weighted results.

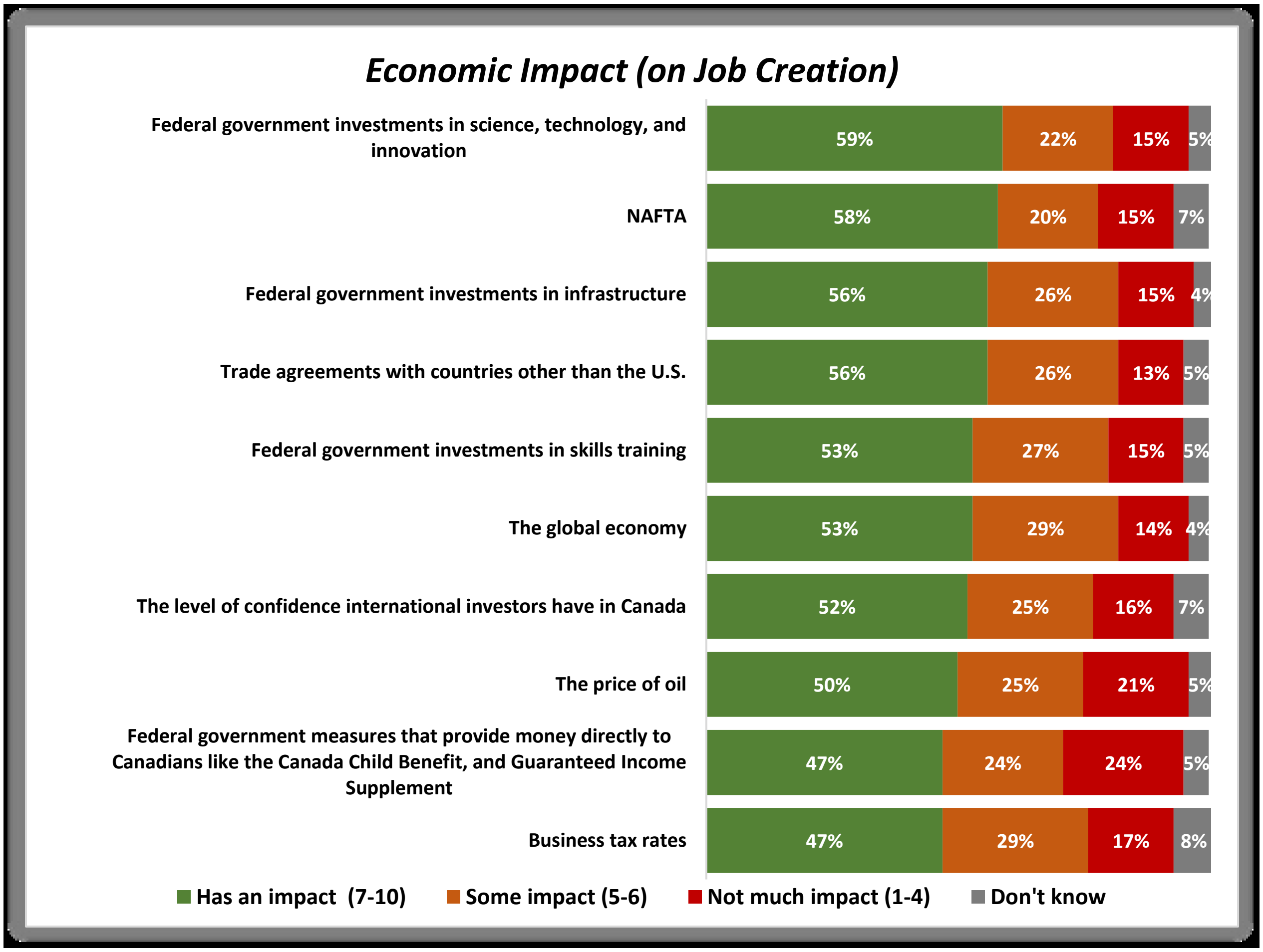
JOB SECURITY							
		Region					
	Total (n=2,000)	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK/NU (n=200)	AB/NWT (n=200)	BC/YK (n=300)
Level of concern that you or someone in your family may lose their job in next six months							
Very concerned (7-10)	22%	19%	16%	26%	23%	30%	14%
Somewhat concerned (5-6)	11%	10%	11%	12%	7%	12%	8%
Not very concerned (1-4)	59%	58%	62%	55%	62%	52%	71%
Not applicable	8%	13%	11%	7%	7%	5%	6%

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. All sample sizes are unweighted numbers and all percentages are weighted results.

Economic Confidence

Respondents were asked how much of an impact various economic factors, trends and measures might have on the economy, including government investment, trade agreements, foreign investment, the global economy, among others. Half of respondents were asked to assess the impact of these factors on “job creation”, while the other half were asked the impact on these factors on “competitiveness of Canadian businesses.”

Respondents who were specifically asked the impact on job creation rated the federal government investments in science, technology, and innovation as having the most impact (59%), followed by NAFTA (58%), the federal government investments in infrastructure (56%), and trade agreements with other countries other than the U.S. (56%).



Q4: How much of an impact do you feel each of the following have on [SPLIT SAMPLE: job creation in Canada]? Base: Split Sample - Job creation, n=1,019. All sample sizes are unweighted numbers and all percentages are weighted results.

Respondents at least 55 years old are the least likely to see an impact of investments in science, technology and innovation on job creation (53% vs. 62% of younger respondents. Those in Quebec are the least likely to see investments in infrastructure having an impact on the economy (46%), as well as those at least 55 years of age (49%).

ECONOMIC IMPACT (ON JOB CREATION)						
		Gender		Age Group		
	Total (n=1,019)	Men (n=498)	Women (n=521)	18-34 (n=242)	35-54 (n=386)	55+ (n=387)
Federal government investments in infrastructure						
Has an impact (7-10)	56%	53%	58%	61%	59%	49%
Some impact (5-6)	26%	26%	26%	25%	27%	26%
Not much impact (1-4)	14%	17%	12%	11%	12%	20%
Don't know	4%	3%	4%	3%	2%	6%
Federal government investments in science, technology, and innovation						
Has an impact (7-10)	59%	58%	59%	64%	61%	53%
Some impact (5-6)	22%	20%	24%	21%	21%	24%
Not much impact (1-4)	15%	16%	13%	11%	15%	17%
Don't know	5%	5%	4%	4%	3%	6%

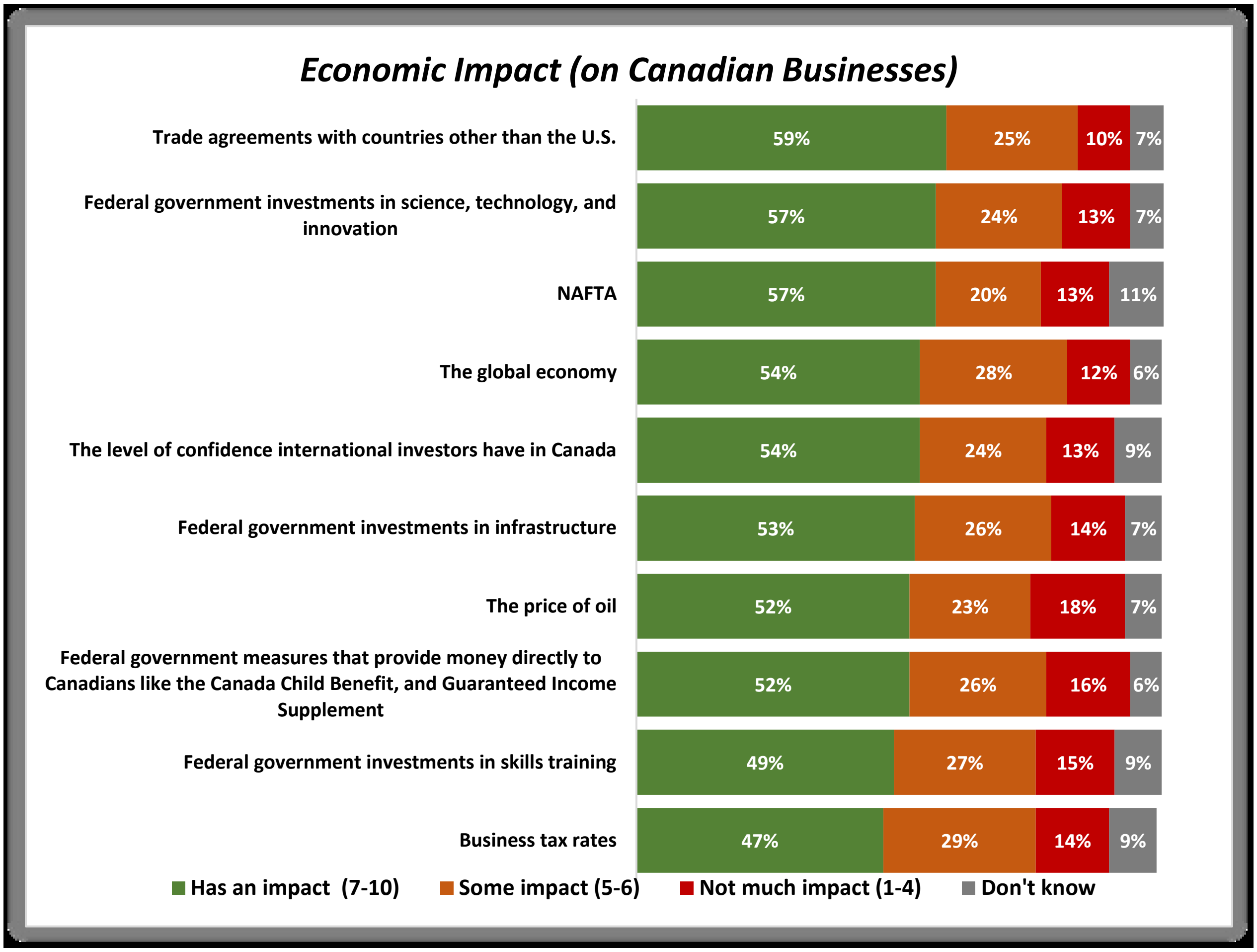
ECONOMIC IMPACT (ON JOB CREATION)						
		Gender		Age Group		
	Total (n=1,019)	Men (n=498)	Women (n=521)	18-34 (n=242)	35-54 (n=386)	55+ (n=387)
Federal government measures that provide money directly to Canadians like the Canada Child Benefit, and Guaranteed Income Supplement						
Has an impact (7-10)	47%	45%	48%	57%	44%	43%
Some impact (5-6)	24%	23%	25%	21%	26%	24%
Not much impact (1-4)	24%	26%	23%	21%	27%	25%
Don't know	5%	6%	5%	1%	4%	9%
Federal government investments in skills training						
Has an impact (7-10)	53%	52%	55%	57%	59%	46%
Some impact (5-6)	27%	26%	28%	29%	24%	28%
Not much impact (1-4)	15%	18%	11%	11%	15%	17%
Don't know	5%	4%	6%	3%	3%	9%
Business tax rates						
Has an impact (7-10)	47%	48%	45%	48%	52%	41%
Some impact (5-6)	29%	26%	32%	31%	29%	28%
Not much impact (1-4)	17%	21%	13%	16%	13%	21%
Don't know	8%	5%	10%	6%	6%	10%
The level of confidence international investors have in Canada						
Has an impact (7-10)	52%	51%	53%	50%	60%	47%
Some impact (5-6)	25%	22%	27%	29%	21%	27%
Not much impact (1-4)	16%	22%	11%	14%	15%	18%
Don't know	7%	5%	8%	7%	5%	9%
The global economy						
Has an impact (7-10)	53%	50%	55%	58%	55%	46%
Some impact (5-6)	29%	31%	28%	25%	32%	31%
Not much impact (1-4)	14%	16%	12%	12%	11%	18%
Don't know	4%	3%	5%	6%	2%	5%
The price of oil						
Has an impact (7-10)	50%	50%	49%	51%	54%	45%
Some impact (5-6)	25%	24%	26%	23%	24%	28%
Not much impact (1-4)	21%	23%	18%	22%	20%	21%
Don't know	5%	3%	6%	5%	2%	6%
NAFTA						
Has an impact (7-10)	58%	59%	57%	55%	63%	55%
Some impact (5-6)	20%	18%	22%	20%	18%	23%
Not much impact (1-4)	15%	15%	14%	14%	14%	16%
Don't know	7%	7%	7%	11%	6%	6%
Trade agreements with countries other than the U.S.						
Has an impact (7-10)	56%	58%	54%	54%	58%	55%
Some impact (5-6)	26%	25%	28%	23%	25%	30%
Not much impact (1-4)	13%	12%	13%	15%	14%	10%
Don't know	5%	5%	5%	7%	3%	5%

Q4: How much of an impact do you feel each of the following have on [SPLIT SAMPLE: job creation in Canada]? Base: Split Sample - Job creation, n=1,019. All sample sizes are unweighted numbers and all percentages are weighted results.

ECONOMIC IMPACT (ON JOB CREATION)							
		Region					
	Total (n=1,019)	ATL (n=180)	QC (n=204)	ON (n=281)	MB/SK/NU (n=101)	AB/NWT (n=100)	BC/YK (n=153)
Federal government investments in infrastructure							
Has an impact (7-10)	56%	57%	46%	60%	53%	58%	57%
Some impact (5-6)	26%	26%	30%	25%	22%	24%	25%
Not much impact (1-4)	14%	15%	17%	13%	21%	12%	15%
Don't know	4%	3%	7%	2%	5%	6%	3%
Federal government investments in science, technology, and innovation							
Has an impact (7-10)	59%	54%	59%	64%	57%	51%	53%
Some impact (5-6)	22%	28%	24%	18%	20%	26%	25%
Not much impact (1-4)	15%	12%	15%	14%	19%	18%	14%
Don't know	5%	6%	3%	4%	4%	6%	8%
Federal government measures that provide money directly to Canadians like the Canada Child Benefit, and Guaranteed Income Supplement							
Has an impact (7-10)	47%	50%	49%	46%	46%	47%	42%
Some impact (5-6)	24%	23%	25%	21%	27%	22%	28%
Not much impact (1-4)	24%	24%	21%	27%	22%	22%	25%
Don't know	5%	3%	5%	5%	4%	8%	5%
Federal government investments in skills training							
Has an impact (7-10)	53%	61%	53%	53%	48%	46%	59%
Some impact (5-6)	27%	26%	26%	29%	32%	29%	17%
Not much impact (1-4)	15%	9%	14%	14%	17%	17%	18%
Don't know	5%	3%	7%	4%	4%	8%	6%
Business tax rates							
Has an impact (7-10)	47%	50%	42%	49%	57%	52%	39%
Some impact (5-6)	29%	24%	29%	28%	22%	33%	34%
Not much impact (1-4)	17%	19%	21%	15%	16%	10%	20%
Don't know	8%	7%	8%	9%	4%	5%	7%
The level of confidence international investors have in Canada							
Has an impact (7-10)	52%	52%	51%	54%	50%	55%	49%
Some impact (5-6)	25%	32%	25%	24%	22%	19%	31%
Not much impact (1-4)	16%	11%	16%	14%	21%	22%	16%
Don't know	7%	5%	7%	7%	8%	5%	5%
The global economy							
Has an impact (7-10)	53%	54%	45%	59%	48%	50%	51%
Some impact (5-6)	29%	32%	32%	23%	39%	29%	36%
Not much impact (1-4)	14%	8%	20%	13%	13%	14%	9%
Don't know	4%	6%	3%	5%	-	7%	5%
The price of oil							
Has an impact (7-10)	50%	52%	39%	52%	56%	62%	47%
Some impact (5-6)	25%	20%	26%	28%	24%	16%	26%
Not much impact (1-4)	21%	23%	31%	15%	16%	18%	23%
Don't know	5%	5%	4%	6%	4%	3%	3%
NAFTA							
Has an impact (7-10)	58%	61%	51%	62%	56%	58%	56%
Some impact (5-6)	20%	18%	20%	20%	22%	16%	24%
Not much impact (1-4)	15%	11%	20%	11%	16%	19%	14%
Don't know	7%	9%	9%	7%	6%	7%	6%
Trade agreements with countries other than the U.S.							
Has an impact (7-10)	56%	60%	49%	56%	60%	55%	63%
Some impact (5-6)	26%	24%	31%	28%	21%	26%	20%
Not much impact (1-4)	13%	13%	15%	11%	12%	12%	13%
Don't know	5%	3%	5%	5%	7%	8%	4%

Q4: How much of an impact do you feel each of the following have on [SPLIT SAMPLE: job creation in Canada]? Base: Split Sample - Job creation, n=1,019. All sample sizes are unweighted numbers and all percentages are weighted results.

Respondents who were specifically asked the impact on the competitiveness of Canadian businesses rated trade agreements with countries other than the U.S. as having the most impact (59%), followed by federal government investments in science, technology, and innovation (57%), and NAFTA (57%).



Q4: How much of an impact do you feel each of the following have on [SPLIT SAMPLE: how competitive Canadian businesses are]? Base: Split Sample – competitiveness of Canadian businesses, n=981. All sample sizes are unweighted numbers and all percentages are weighted results.

Residents of Alberta are the least likely to see an impact of trade agreements with countries other than the U.S. (47%). Respondents more likely to see an impact of investments in science and technology on the competitiveness of Canadian businesses are residents of Quebec (64%) and Ontario (62%), as well as those under 55 years of age (62%).

ECONOMIC IMPACT (ON CANADIAN BUSINESSES)						
		Gender		Age Group		
	Total (n=981)	Men (n=504)	Women (n=477)	18-34 (n=258)	35-54 (n=364)	55+ (n=353)
Federal government investments in infrastructure						
Has an impact (7-10)	53%	55%	51%	57%	56%	47%
Some impact (5-6)	26%	24%	28%	24%	23%	29%
Not much impact (1-4)	14%	15%	13%	10%	14%	17%
Don't know	7%	6%	8%	9%	6%	7%
Federal government investments in science, technology, and innovation						
Has an impact (7-10)	57%	58%	56%	64%	60%	48%
Some impact (5-6)	24%	22%	25%	18%	23%	29%
Not much impact (1-4)	13%	13%	12%	9%	10%	17%
Don't know	7%	7%	7%	9%	7%	6%
Federal government measures that provide money directly to Canadians like the Canada Child Benefit, and Guaranteed Income Supplement						
Has an impact (7-10)	52%	50%	54%	56%	47%	53%
Some impact (5-6)	26%	25%	26%	22%	29%	26%
Not much impact (1-4)	16%	19%	14%	13%	20%	15%
Don't know	6%	7%	6%	9%	4%	7%
Federal government investments in skills training						
Has an impact (7-10)	49%	50%	48%	58%	53%	38%
Some impact (5-6)	27%	28%	27%	22%	28%	31%
Not much impact (1-4)	15%	15%	15%	11%	10%	23%
Don't know	9%	7%	10%	9%	10%	8%
Business tax rates						
Has an impact (7-10)	47%	48%	46%	51%	57%	35%
Some impact (5-6)	29%	30%	28%	28%	25%	34%
Not much impact (1-4)	14%	14%	15%	13%	11%	18%
Don't know	9%	7%	12%	8%	8%	13%
The level of confidence international investors have in Canada						
Has an impact (7-10)	54%	54%	54%	56%	57%	51%
Some impact (5-6)	24%	23%	24%	23%	22%	26%
Not much impact (1-4)	13%	15%	11%	10%	14%	15%
Don't know	9%	8%	10%	11%	7%	9%
The global economy						
Has an impact (7-10)	54%	55%	53%	62%	56%	47%
Some impact (5-6)	28%	26%	30%	22%	26%	34%
Not much impact (1-4)	12%	13%	11%	11%	12%	13%
Don't know	6%	5%	6%	5%	6%	6%
The price of oil						
Has an impact (7-10)	52%	50%	55%	55%	55%	47%
Some impact (5-6)	23%	25%	21%	20%	23%	25%
Not much impact (1-4)	18%	19%	17%	16%	15%	22%
Don't know	7%	6%	7%	8%	7%	5%
NAFTA						
Has an impact (7-10)	57%	59%	54%	57%	60%	53%
Some impact (5-6)	20%	20%	20%	18%	20%	21%
Not much impact (1-4)	13%	12%	14%	9%	12%	18%
Don't know	11%	9%	12%	16%	8%	8%
Trade agreements with countries other than the U.S.						
Has an impact (7-10)	59%	58%	60%	59%	62%	56%
Some impact (5-6)	25%	26%	23%	24%	23%	26%
Not much impact (1-4)	10%	11%	9%	8%	8%	13%
Don't know	7%	5%	8%	9%	7%	5%

Q4: How much of an impact do you feel each of the following have on [SPLIT SAMPLE: how competitive Canadian businesses are]? Base: Split Sample – competitiveness of Canadian businesses, n=981. All sample sizes are unweighted numbers and all percentages are weighted results.

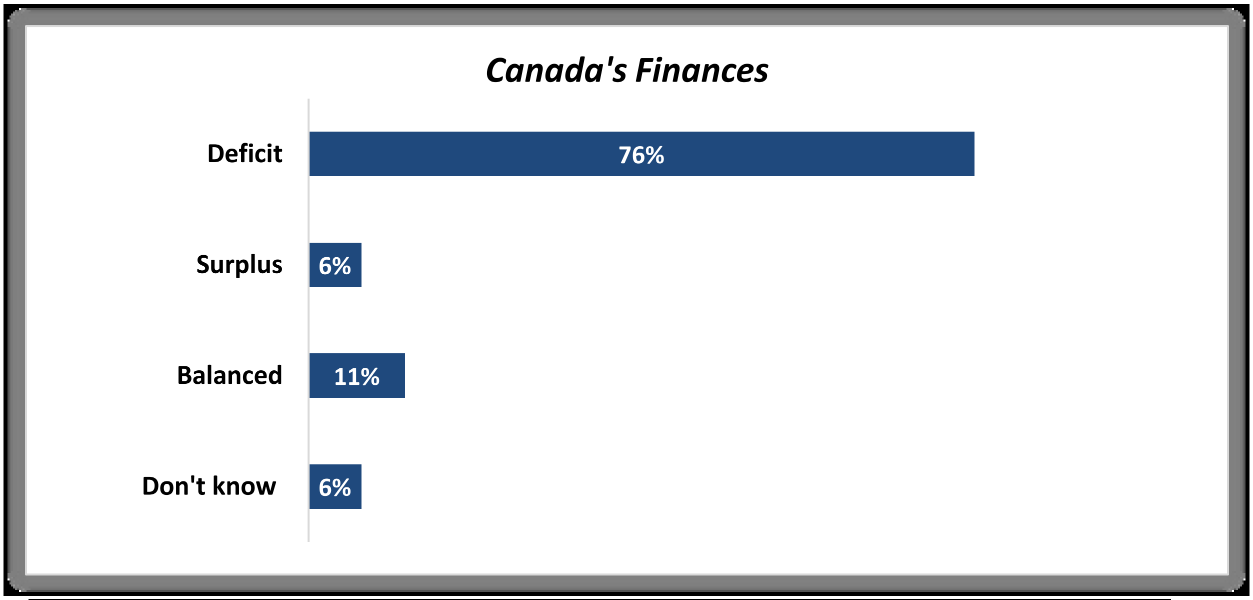
ECONOMIC IMPACT (ON CANADIAN BUSINESSES)							
		Region					
	Total (n=981)	ATL (n=170)	QC (n=196)	ON (n=269)	MB/SK/NU (n=99)	AB/NWT (n=100)	BC/YK (n=147)
Federal government investments in infrastructure							
Has an impact (7-10)	53%	58%	48%	57%	56%	48%	50%
Some impact (5-6)	26%	25%	28%	24%	25%	27%	27%
Not much impact (1-4)	14%	10%	16%	13%	10%	19%	14%
Don't know	7%	7%	8%	6%	9%	5%	9%
Federal government investments in science, technology, and innovation							
Has an impact (7-10)	57%	53%	64%	62%	52%	43%	46%
Some impact (5-6)	24%	27%	17%	22%	25%	32%	33%
Not much impact (1-4)	13%	13%	13%	11%	13%	16%	14%
Don't know	7%	8%	7%	6%	10%	8%	7%
Federal government measures that provide money directly to Canadians like the Canada Child Benefit, and Guaranteed Income Supplement							
Has an impact (7-10)	52%	57%	59%	52%	48%	35%	50%
Some impact (5-6)	26%	22%	17%	28%	27%	31%	31%
Not much impact (1-4)	16%	17%	18%	12%	17%	28%	13%
Don't know	6%	5%	6%	7%	8%	6%	6%
Federal government investments in skills training							
Has an impact (7-10)	49%	55%	47%	52%	45%	44%	47%
Some impact (5-6)	27%	26%	28%	26%	30%	26%	28%
Not much impact (1-4)	15%	11%	16%	14%	12%	20%	17%
Don't know	9%	8%	10%	8%	13%	10%	8%
Business tax rates							
Has an impact (7-10)	47%	40%	44%	46%	54%	51%	51%
Some impact (5-6)	29%	29%	31%	31%	22%	26%	28%
Not much impact (1-4)	14%	19%	18%	14%	12%	11%	10%
Don't know	9%	12%	7%	9%	12%	11%	11%
The level of confidence international investors have in Canada							
Has an impact (7-10)	54%	47%	56%	59%	48%	51%	48%
Some impact (5-6)	24%	32%	26%	21%	26%	20%	26%
Not much impact (1-4)	13%	10%	7%	12%	11%	23%	19%
Don't know	9%	11%	11%	8%	15%	6%	7%
The global economy							
Has an impact (7-10)	54%	52%	55%	56%	52%	49%	55%
Some impact (5-6)	28%	28%	29%	28%	32%	25%	25%
Not much impact (1-4)	12%	13%	11%	10%	9%	22%	13%
Don't know	6%	8%	5%	6%	7%	4%	7%
The price of oil							
Has an impact (7-10)	52%	52%	47%	54%	67%	60%	45%
Some impact (5-6)	23%	22%	22%	22%	22%	18%	31%
Not much impact (1-4)	18%	18%	25%	16%	5%	17%	20%
Don't know	7%	7%	6%	8%	6%	6%	5%
NAFTA							
Has an impact (7-10)	57%	58%	57%	56%	61%	54%	58%
Some impact (5-6)	20%	21%	18%	20%	22%	22%	17%
Not much impact (1-4)	13%	8%	17%	13%	7%	11%	14%
Don't know	11%	12%	7%	12%	11%	11%	12%

ECONOMIC IMPACT (ON CANADIAN BUSINESSES)							
		Region					
	Total (n=981)	ATL (n=170)	QC (n=196)	ON (n=269)	MB/SK/NU (n=99)	AB/NWT (n=100)	BC/YK (n=147)
Trade agreements with countries other than the U.S.							
Has an impact (7-10)	59%	59%	60%	62%	54%	47%	60%
Some impact (5-6)	25%	22%	24%	22%	23%	32%	27%
Not much impact (1-4)	10%	11%	10%	10%	10%	12%	7%
Don't know	7%	8%	5%	6%	13%	8%	6%

Q4: How much of an impact do you feel each of the following have on [SPLIT SAMPLE: how competitive Canadian businesses are]? Base: Split Sample – competitiveness of Canadian businesses, n=981. All sample sizes are unweighted numbers and all percentages are weighted results.

General Fiscal Situation

All survey participants were asked to give their impression on where the federal government's finances stand. Over three quarters (76%) of respondents think the federal government is operating with a budget deficit, 11% feel it is operating with a balanced budget, and 6% with a budget surplus.



Q5: Let's turn our attention to the Government of Canada's finances. As far as you know, do you think it is operating with a budget surplus (it took in more money than it spent) or a deficit (where it spent more than it took in) or a balanced budget? Base: All Respondents, n=2,000. All sample sizes are unweighted numbers and all percentages are weighted results.

Respondents at least 35 years old are more likely to say the federal government is operating with a deficit, compared to younger respondents (80% vs. 66%). The latter are more likely to say it is operating with a balanced budget (18% vs. 9%).

In terms of regional differences, Quebec residents are the least likely to say the federal government is operating with a budget deficit (69%), and the most likely to say it is operating with a balanced budget (16%).

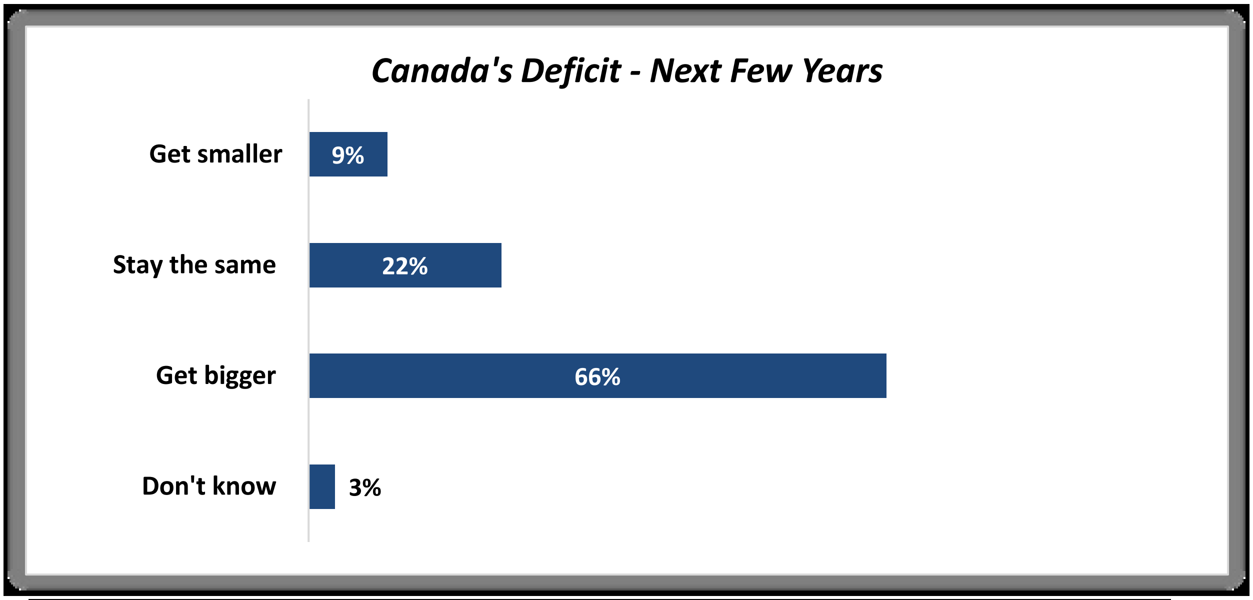
CANADA'S FINANCES						
		Gender		Age Group		
	Total (n=2,000)	Men (n=1,002)	Women (n=998)	18-34 (n=500)	35-54 (n=750)	55+ (n=740)
Deficit	76%	75%	77%	66%	79%	80%
Surplus	6%	7%	6%	8%	5%	6%
Balanced	11%	12%	11%	18%	9%	9%
Don't know	6%	6%	6%	9%	7%	4%

Q5: Let's turn our attention to the Government of Canada's finances. As far as you know, do you think it is operating with a budget surplus (it took in more money than it spent) or a deficit (where it spent more than it took in) or a balanced budget? Base: All Respondents, n=2,000. All sample sizes are unweighted numbers and all percentages are weighted results.

CANADA'S FINANCES							
		Region					
	Total (n=2,000)	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK/NU (n=200)	AB/NWT (n=200)	BC/YK (n=300)
Deficit	76%	82%	69%	78%	83%	78%	75%
Surplus	6%	6%	8%	6%	7%	3%	7%
Balanced	11%	8%	16%	11%	6%	9%	11%
Don't know	6%	5%	7%	6%	4%	10%	7%

Q5: Let's turn our attention to the Government of Canada's finances. As far as you know, do you think it is operating with a budget surplus (it took in more money than it spent) or a deficit (where it spent more than it took in) or a balanced budget? Base: All Respondents, n=2,000. All sample sizes are unweighted numbers and all percentages are weighted results.

Next, respondents were asked their expectations on how the federal government's deficit will move in the coming years. Two thirds believe the deficit will grow (66%), while 22% believe it will stay the same, and 9% expect it to get smaller.



Q6: In fact, the federal government has been running deficits for each of the last few years. Over the next few years, do you think the deficit will (ROTATE ORDER: get bigger, get smaller) or stay the same size? Base: All Respondents, n=2,000. All sample sizes are unweighted numbers and all percentages are weighted results.

Analysis based on demographics show respondents at least 35 years of age are more likely to say the deficit will get bigger (69%) compared to younger respondents (59%). Additionally, men are more likely than women to say the deficit will get smaller (10% vs. 7%), as are respondents under 35 years of age (12%), compared to older respondents (8%).

In terms of regional differences, Quebec residents are the least likely to say the deficit will grow (57%), and the most likely to say the deficit will stay the same (32%), compared to residents in other provinces or territories.

CANADA'S DEFICIT – NEXT FEW YEARS

		Gender		Age Group		
	Total (n=2,000)	Men (n=1,002)	Women (n=998)	18-34 (n=500)	35-54 (n=750)	55+ (n=740)
Get smaller	9%	10%	7%	12%	8%	8%
Stay the same	22%	22%	23%	23%	24%	21%
Get bigger	66%	65%	67%	59%	66%	71%
Don't know	3%	2%	3%	5%	3%	1%

Q6: In fact, the federal government has been running deficits for each of the last few years. Over the next few years, do you think the deficit will (ROTATE ORDER: get bigger, get smaller) or stay the same size? Base: All Respondents, n=2,000. All sample sizes are unweighted numbers and all percentages are weighted results.

CANADA'S DEFICIT – NEXT FEW YEARS							
		Region					
	Total (n=2,000)	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK/NU (n=200)	AB/NWT (n=200)	BC/YK (n=300)
Get smaller	9%	13%	9%	10%	10%	8%	5%
Stay the same	22%	19%	32%	22%	15%	13%	22%
Get bigger	66%	65%	57%	66%	71%	77%	70%
Don't know	3%	3%	2%	2%	4%	2%	4%

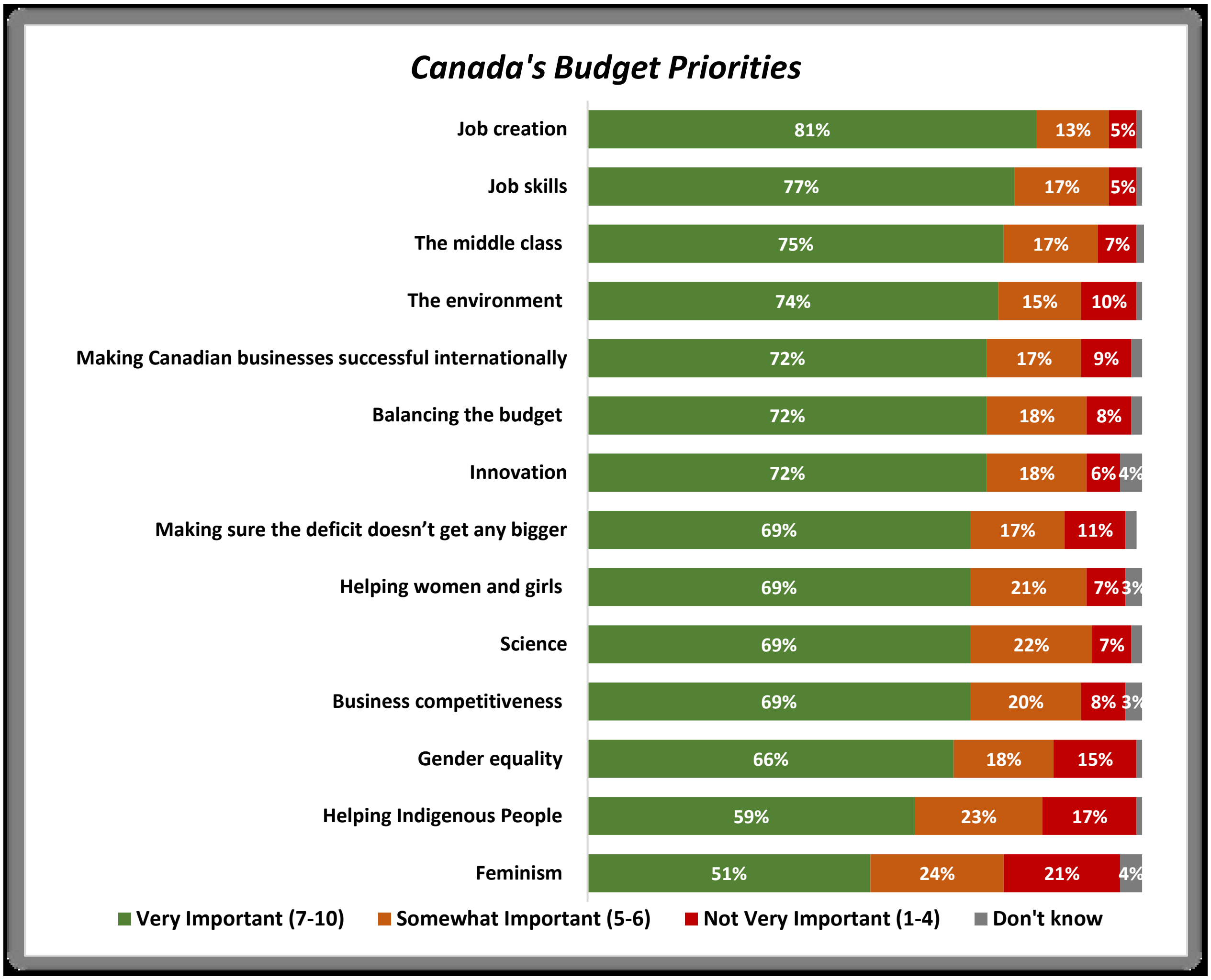
Q6: In fact, the federal government has been running deficits for each of the last few years. Over the next few years, do you think the deficit will (ROTATE ORDER: get bigger, get smaller) or stay the same size? Base: All Respondents, n=2,000. All sample sizes are unweighted numbers and all percentages are weighted results.

Budget Priorities

Respondents were then asked how important several issues and priorities were for the federal government to keep in mind when making budget decisions. Over three quarters of respondents feel it is "very important" that the federal government focuses on job creation (81%) and job skills (77%) when making budget decisions. Three quarters feel it would be important that the federal government considers the middle class (75%) and the environment (74%). Roughly 7 in 10 feel it is important the federal government considers making Canadian businesses successful internationally (72%), balancing the budget (72%), focusing on innovation (72%), making sure the deficit does not get any bigger (69%), helping women and girls (69%), focusing on science (69%) and focusing on business competitiveness (69%).

Two thirds of respondents or less feel it is important the federal government considers in their budget priorities gender equality (66%), helping indigenous people (59%) and feminism (51%).

In the graphs and data tables in this section, it is important to note that the results for certain issues and themes were presented to split samples – for instance, half of all respondents were presented "science" and the other half "innovation."



Q7: How important is it for the Government of Canada to keep the following in mind when making Budget decisions? Please use a scale from 1 to 10, where 1 means it is not at all important and 10 means it is very important. Base: All Respondents, n= 2,000. All sample sizes are unweighted numbers and all percentages are weighted results.

Demographic analysis reveals women are more likely than men to believe it is "very important" to consider job creation (83% vs. 79%), and job skills (80% vs. 74%) when making budget decisions, as well as the environment (80% vs. 69%), gender equality (73% vs. 58%), and helping Indigenous Peoples (65% vs. 53%). Men are more likely than women to believe it is important for the federal government to focus on businesses competitiveness (73% vs. 65%).

In terms of age, respondents under 35 years of age are more likely than older respondents (especially those at least 55 years old) to believe it is important to consider the environment (80% vs. 72%), the middle class (78% vs. 71%), innovation (77% vs. 68%), helping women and girls (82% vs. 61%), and helping Indigenous Peoples (66% vs. 55%) when making budget decisions.

CANADA'S BUDGET PRIORITIES						
		Gender		Age Group		
	Total (n=2,000)	Men (n=1,002)	Women (n=998)	18-34 (n=500)	35-54 (n=750)	55+ (n=740)
The middle class						
Very important (7-10)	75%	75%	75%	78%	77%	71%
Somewhat important (5-6)	17%	17%	17%	17%	15%	19%
Not very important (1-4)	7%	7%	6%	5%	7%	8%
Don't know	2%	2%	1%	1%	1%	2%
Job creation						
Very important (7-10)	81%	79%	83%	82%	83%	79%
Somewhat important (5-6)	13%	14%	13%	14%	12%	14%
Not very important (1-4)	5%	7%	3%	4%	5%	6%
Don't know	1%	1%	1%	<1%	-	1%
Helping Indigenous Peoples						
Very important (7-10)	59%	53%	65%	66%	57%	55%
Somewhat important (5-6)	23%	24%	22%	19%	24%	25%
Not very important (1-4)	17%	22%	12%	13%	18%	18%
Don't know	1%	2%	1%	2%	1%	2%
Science (SPLIT)	**Total (n=994)**	Men (n=503)	Women (n=491)	18-34 (n=260)	35-54 (n=349)	55+ (n=378)
Very important (7-10)	69%	70%	68%	73%	70%	66%
Somewhat important (5-6)	22%	20%	23%	20%	20%	24%
Not very important (1-4)	7%	7%	7%	6%	9%	7%
Don't know	2%	3%	2%	1%	1%	3%
Innovation (SPLIT)	**Total (n=1,006)**	Men (n=499)	Women (n=507)	18-34 (n=240)	35-54 (n=401)	55+ (n=362)
Very important (7-10)	72%	72%	71%	77%	72%	68%
Somewhat important (5-6)	18%	18%	18%	15%	19%	20%
Not very important (1-4)	6%	7%	6%	6%	6%	6%
Don't know	4%	3%	4%	2%	2%	6%
Feminism (SPLIT)	**Total (n=704)**	Men (n=350)	Women (n=354)	18-34 (n=176)	35-54 (n=257)	55+ (n=269)
Very important (7-10)	51%	50%	53%	53%	48%	53%
Somewhat important (5-6)	24%	25%	23%	22%	25%	24%
Not very important (1-4)	21%	22%	20%	21%	22%	21%
Don't know	4%	3%	4%	3%	5%	3%
Helping women and girls (SPLIT)	**Total (n=648)**	Men (n=324)	Women (n=324)	18-34 (n=166)	35-54 (n=228)	55+ (n=250)
Very important (7-10)	69%	68%	71%	82%	70%	61%
Somewhat important (5-6)	21%	20%	22%	13%	23%	25%
Not very important (1-4)	7%	8%	5%	4%	7%	8%
Don't know	3%	4%	2%	1%	-	6%
Gender equality (SPLIT)	**Total (n=648)**	Men (n=328)	Women (n=320)	18-34 (n=158)	35-54 (n=265)	55+ (n=221)
Very important (7-10)	66%	58%	73%	68%	60%	70%
Somewhat important (5-6)	18%	20%	16%	21%	20%	15%
Not very important (1-4)	15%	20%	9%	9%	20%	14%
Don't know	1%	1%	2%	2%	1%	2%
The environment						
Very important (7-10)	74%	69%	80%	80%	73%	72%
Somewhat important (5-6)	15%	18%	12%	11%	16%	17%
Not very important (1-4)	10%	12%	8%	8%	11%	10%
Don't know	1%	1%	<1%	<1%	<1%	1%
Job skills						

CANADA'S BUDGET PRIORITIES						
		Gender		**Age Group**		
	Total (n=2,000)	Men (n=1,002)	Women (n=998)	18-34 (n=500)	35-54 (n=750)	55+ (n=740)
Very important (7-10)	77%	74%	80%	77%	78%	76%
Somewhat important (5-6)	17%	18%	15%	17%	16%	17%
Not very important (1-4)	5%	7%	4%	5%	5%	6%
Don't know	1%	1%	1%	1%	1%	2%
Business competitiveness (SPLIT)	**Total (n=1,003)**	Men (n=522)	Women (n=481)	18-34 (n=251)	35-54 (n=365)	55+ (n=383)
Very important (7-10)	69%	73%	65%	68%	70%	69%
Somewhat important (5-6)	20%	17%	23%	25%	20%	17%
Not very important (1-4)	8%	8%	7%	6%	8%	8%
Don't know	3%	2%	5%	2%	2%	5%
Making Canadian businesses successful internationally (SPLIT)	**Total (n=997)**	Men (n=480)	Women (n=517)	18-34 (n=249)	35-54 (n=385)	55+ (n=357)
Very important (7-10)	72%	76%	70%	75%	73%	71%
Somewhat important (5-6)	17%	14%	20%	16%	18%	17%
Not very important (1-4)	9%	10%	8%	9%	7%	9%
Don't know	2%	1%	2%	<1%	1%	3%
Making sure the deficit doesn't get any bigger (SPLIT)	**Total (n=989)**	Men (n=502)	Women (n=487)	18-34 (n=251)	35-54 (n=375)	55+ (n=358)
Very important (7-10)	69%	71%	68%	64%	73%	70%
Somewhat important (5-6)	17%	15%	20%	21%	16%	16%
Not very important (1-4)	11%	12%	11%	13%	9%	12%
Don't know	2%	2%	1%	2%	2%	2%
Balancing the budget (SPLIT)	**Total (n=1,011)**	Men (n=500)	Women (n=511)	18-34 (n=249)	35-54 (n=375)	55+ (n=382)
Very important (7-10)	72%	71%	73%	75%	71%	71%
Somewhat important (5-6)	18%	19%	16%	14%	20%	18%
Not very important (1-4)	8%	8%	9%	7%	8%	10%
Don't know	2%	2%	2%	3%	1%	2%

Q7: How important is it for the Government of Canada to keep the following in mind when making Budget decisions? Please use a scale from 1 to 10, where 1 means it is not at all important and 10 means it is very important. Base: All Respondents, n= 2,000. All sample sizes are unweighted numbers and all percentages are weighted results.

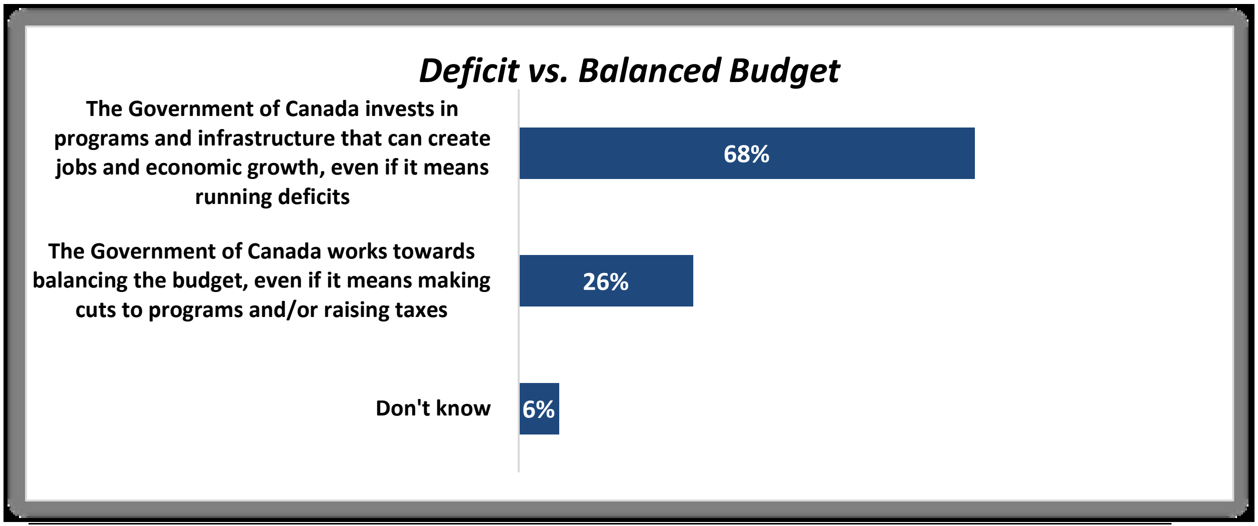
Regionally, residents in Atlantic Canada, Ontario and British Columbia/Yukon, are more likely to assign higher importance to the middle class and science when making budget decisions. Residents of these same provinces along with those in Quebec are the most likely to assign higher importance to helping indigenous people, gender equality and the environment. Making sure the deficit does not get any bigger is important for residents of Atlantic Canada, Ontario, Manitoba, Saskatchewan, and Alberta/NWT.

CANADA'S BUDGET PRIORITIES							
		Region					
	Total (n=2,000)	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK/NU (n=200)	AB/NWT (n=200)	BC/YK (n=300)
The middle class							
Very important (7-10)	75%	77%	73%	79%	65%	71%	75%
Somewhat important (5-6)	17%	14%	15%	15%	25%	24%	16%
Not very important (1-4)	7%	6%	10%	4%	6%	5%	9%
Don't know	2%	2%	2%	2%	4%	<1%	1%
Job creation							
Very important (7-10)	81%	84%	79%	83%	81%	81%	77%
Somewhat important (5-6)	13%	10%	14%	12%	11%	13%	17%
Not very important (1-4)	5%	5%	7%	4%	7%	5%	4%
Don't know	1%	<1%	<1%	1%	1%	1%	1%
Helping Indigenous People							
Very important (7-10)	59%	61%	59%	63%	47%	49%	61%
Somewhat important (5-6)	23%	25%	21%	21%	27%	29%	21%
Not very important (1-4)	17%	12%	18%	15%	22%	22%	18%
Don't know	1%	2%	2%	1%	4%	1%	<1%
Science (SPLIT)	**Total (n=994)**	ATL (n=161)	QC (n=199)	ON (n=266)	MB/SK/NU (n=104)	AB/NWT (n=103)	BC/YK (n=161)
Very important (7-10)	69%	77%	65%	75%	55%	59%	73%
Somewhat important (5-6)	22%	17%	25%	17%	35%	28%	20%
Not very important (1-4)	7%	5%	8%	5%	10%	11%	6%
Don't know	2%	2%	3%	3%	-	2%	1%
Innovation (SPLIT)	**Total (n=1,006)**	ATL (n=189)	QC (n=201)	ON (n=284)	MB/SK/NU (n=96)	AB/NWT (n=97)	BC/YK (n=139)
Very important (7-10)	72%	75%	69%	74%	66%	72%	71%
Somewhat important (5-6)	18%	17%	19%	15%	20%	22%	22%
Not very important (1-4)	6%	4%	6%	7%	10%	3%	5%
Don't know	4%	4%	5%	3%	4%	3%	2%
Feminism (SPLIT)	**Total (n=704)**	ATL (n=123)	QC (n=141)	ON (n=191)	MB/SK/NU (n=70)	AB/NWT (n=73)	BC/YK (n=106)
Very important (7-10)	51%	55%	57%	54%	31%	37%	53%
Somewhat important (5-6)	24%	28%	23%	23%	27%	22%	26%
Not very important (1-4)	21%	14%	17%	19%	38%	36%	17%
Don't know	4%	4%	3%	4%	4%	6%	4%
Helping women and girls (SPLIT)	**Total (n=648)**	ATL (n=107)	QC (n=128)	ON (n=181)	MB/SK/NU (n=66)	AB/NWT (n=64)	BC/YK (n=102)
Very important (7-10)	69%	74%	70%	68%	74%	69%	67%
Somewhat important (5-6)	21%	17%	22%	21%	19%	24%	21%
Not very important (1-4)	7%	6%	5%	7%	7%	7%	9%
Don't know	3%	3%	3%	3%	-	-	3%
Gender equality (SPLIT)	**Total (n=648)**	ATL (n=120)	QC (n=131)	ON (n=178)	MB/SK/NU (n=64)	AB/NWT (n=63)	BC/YK (n=92)
Very important (7-10)	66%	67%	75%	66%	59%	46%	71%
Somewhat important (5-6)	18%	13%	18%	15%	22%	29%	19%
Not very important (1-4)	15%	18%	6%	17%	18%	24%	10%
Don't know	1%	2%	1%	2%	2%	2%	-
The environment							
Very important (7-10)	74%	79%	77%	77%	56%	65%	78%
Somewhat important (5-6)	15%	13%	11%	14%	24%	21%	16%
Not very important (1-4)	10%	8%	12%	8%	19%	14%	6%
Don't know	1%	<1%	1%	1%	1%	-	1%

Job skills							
Very important (7-10)	77%	79%	74%	80%	70%	74%	78%
Somewhat important (5-6)	17%	16%	18%	13%	22%	19%	18%
Not very important (1-4)	5%	4%	6%	6%	7%	5%	4%
Don't know	1%	1%	2%	1%	1%	2%	1%
Business competitiveness (SPLIT)	**Total (n=1,003)**	ATL (n=181)	QC (n=206)	ON (n=264)	MB/SK/NU (n=98)	AB/NWT (n=100)	BC/YK (n=154)
Very important (7-10)	69%	72%	63%	73%	71%	68%	70%
Somewhat important (5-6)	20%	21%	22%	19%	18%	21%	19%
Not very important (1-4)	8%	4%	10%	6%	8%	5%	9%
Don't know	3%	3%	5%	2%	3%	6%	2%
Making Canadian businesses successful internationally (SPLIT)	**Total (n=997)**	ATL (n=169)	QC (n=194)	ON (n=286)	MB/SK/NU (n=102)	AB/NWT (n=100)	BC/YK (n=146)
Very important (7-10)	72%	74%	72%	76%	71%	69%	65%
Somewhat important (5-6)	17%	18%	16%	15%	15%	21%	22%
Not very important (1-4)	9%	7%	8%	7%	13%	10%	11%
Don't know	2%	1%	4%	1%	2%	1%	2%
Making sure the deficit doesn't get any bigger (SPLIT)	**Total (n=989)**	ATL (n=183)	QC (n=202)	ON (n=270)	MB/SK/NU (n=104)	AB/NWT (n=97)	BC/YK (n=133)
Very important (7-10)	69%	77%	59%	71%	81%	78%	66%
Somewhat important (5-6)	17%	11%	25%	16%	8%	14%	22%
Not very important (1-4)	11%	11%	13%	12%	8%	7%	11%
Don't know	2%	1%	3%	1%	4%	1%	1%
Balancing the budget (SPLIT)	**Total (n=1,011)**	ATL (n=167)	QC (n=198)	ON (n=280)	MB/SK/NU (n=96)	AB/NWT (n=103)	BC/YK (n=167)
Very important (7-10)	72%	75%	66%	74%	73%	78%	70%
Somewhat important (5-6)	18%	16%	21%	16%	18%	10%	23%
Not very important (1-4)	8%	8%	11%	8%	9%	6%	7%
Don't know	2%	1%	2%	2%	-	6%	<1%

Q7: How important is it for the Government of Canada to keep the following in mind when making Budget decisions? Please use a scale from 1 to 10, where 1 means it is not at all important and 10 means it is very important. Base: All Respondents, n= 2,000. All sample sizes are unweighted numbers and all percentages are weighted results.

Respondents were asked to choose between two different statements regarding government investment, programs and raising taxes. Over two thirds (68%) of Canadians prefer a scenario whereby the federal government invests in programs and infrastructure that can create jobs and economic growth, even if that means running deficits. Just over a quarter (26%) of respondents prefer the alternative option whereby the federal government works towards balancing the budget, even if it means making cuts to programs and/or raising taxes.



Q8: Which do you prefer? Base: All Respondents, n=2,000. All sample sizes are unweighted numbers and all percentages are weighted results.

Respondents under 35 years old are more likely to prefer running deficits that lead to job creation and economic growth, compared to those at least 35 years old (75% vs. 66%). Atlantic Canada residents are the most likely to prefer the deficit option (74%), especially compared to residents from Manitoba, Saskatchewan and Nunavut (65%), and Alberta/Northwest Territories (62%).

DEFICIT VS. BALANCED BUDGET						
		Gender		Age Group		
	Total (n=2,000)	Men (n=1,002)	Women (n=998)	18-34 (n=500)	35-54 (n=750)	55+ (n=740)
The Government of Canada invests in programs and infrastructure that can create jobs and economic growth, even if it means running deficits	68%	66%	70%	75%	66%	65%
The Government of Canada works towards balancing the budget, even if it means making cuts to programs and/or raising taxes	26%	28%	24%	20%	27%	29%
Don’t know	6%	6%	6%	5%	7%	6%

Q8: Which do you prefer? Base: All Respondents, n=2,000. All sample sizes are unweighted numbers and all percentages are weighted results.

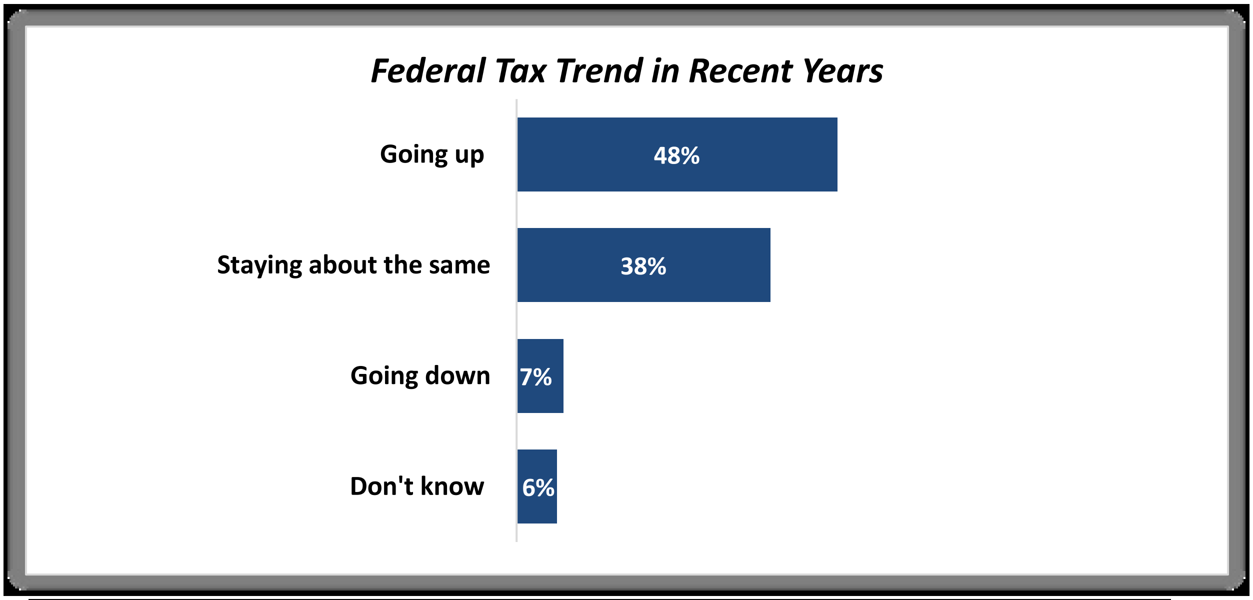
DEFICIT VS. BALANCED BUDGET							
		Region					
	Total (n=2,000)	ATL (n=350)	QC (n=400)	ON (n=550)	MB/SK/NU (n=200)	AB/NWT (n=200)	BC/YK (n=300)
The Government of Canada invests in programs and infrastructure that can create jobs and economic growth, even if it means running deficits	68%	74%	69%	69%	65%	62%	68%
The Government of Canada works towards balancing the budget, even if it means making cuts to programs and/or raising taxes	26%	23%	26%	25%	28%	30%	26%
Don't know	6%	3%	6%	6%	7%	8%	6%

Q8: Which do you prefer? Base: All Respondents, n=2,000. All sample sizes are unweighted numbers and all percentages are weighted results.

Impressions of Trends in Taxes and Financial Support

Respondents were asked whether federal income taxes have been going up or down and whether the financial support from the federal government to Canadians has been going up or down (half were presented one scenario and half the other).

Regarding trends in federal taxes specifically, nearly half of those respondents (48%) feel federal income taxes have gone up in recent years, while 38% feel they have stayed the same, and 7% feel they have gone down. As for federal government financial support to Canadians, 28% feel it has gone up, 36% feel it has stayed about the same, and 29% feel it has gone down.



Q9: As far as you know, do you feel (SPLIT SAMPLE: federal income taxes have (ROTATE ORDER: going up or going down), or staying the same in recent years? Base: Split sample – Federal income taxes, n=1,041. All sample sizes are unweighted numbers and all percentages are weighted results.

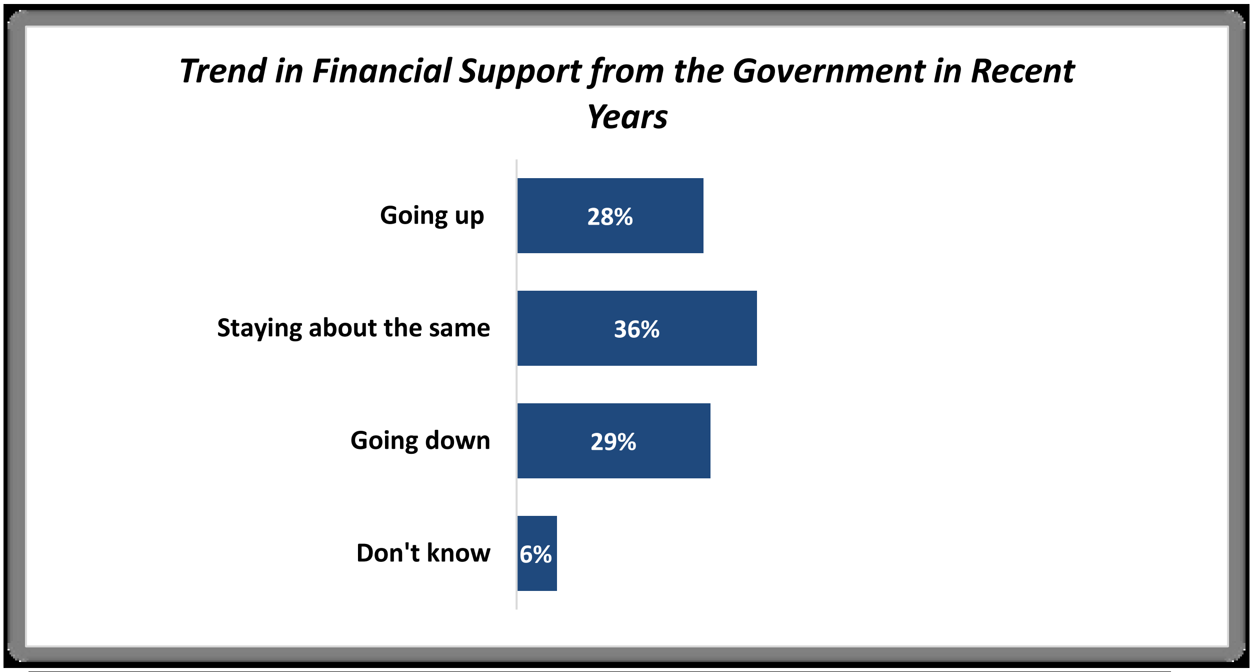
Regionally, Albertans are the most likely to believe federal taxes have increased (61%). Quebecers are the most likely to believe both federal taxes (47%) and federal government financial support to Canadians (45%) have stayed the same.

FEDERAL TAX TREND IN RECENT YEARS						
		Gender		**Age Group**		
	Total (n=1,041)	Men (n=518)	Women (n=523)	18-34 (n=265)	35-54 (n=395)	55+ (n=376)
Going up	48%	49%	47%	51%	47%	47%
Staying about the same	38%	39%	38%	35%	39%	41%
Going down	7%	7%	7%	6%	8%	7%
Don't know	6%	5%	7%	8%	6%	5%

Q9: As far as you know, do you feel (SPLIT SAMPLE: federal income taxes have) been (ROTATE ORDER: going up or going down), or staying the same in recent years? Base: Split sample – Federal income taxes, n=1,041. All sample sizes are unweighted numbers and all percentages are weighted results.

FEDERAL TAX TREND IN RECENT YEARS							
		Region					
	Total (n=1,041)	ATL (n=172)	QC (n=203)	ON (n=289)	MB/SK/NU (n=106)	AB/NWT (n=117)	BC/YK (n=154)
Going up	48%	55%	40%	48%	50%	61%	46%
Staying about the same	38%	34%	47%	38%	33%	28%	40%
Going down	7%	4%	9%	8%	7%	5%	5%
Don't know	6%	7%	4%	6%	10%	5%	9%

Q9: As far as you know, do you feel (SPLIT SAMPLE: federal income taxes have) been (ROTATE ORDER: going up or going down), or staying the same in recent years? Base: Split sample – Federal income taxes, n=1,041. All sample sizes are unweighted numbers and all percentages are weighted results.



Q9: As far as you know, do you feel (SPLIT SAMPLE: the amount of financial support the Government of Canada provides to Canadians has) been (ROTATE ORDER: going up or going down), or staying the same in recent years? Base: Split sample – financial support, n=959. All sample sizes are unweighted numbers and all percentages are weighted results.

TREND IN FINANCIAL SUPPORT FROM THE GOVERNMENT IN RECENT YEARS						
		Gender		Age Group		
	Total (n=959)	Men (n=484)	Women (n=475)	18-34 (n=235)	35-54 (n=355)	55+ (n=364)
Going up	28%	27%	29%	32%	27%	26%
Staying about the same	36%	37%	36%	37%	36%	36%
Going down	29%	29%	30%	24%	31%	32%
Don't know	6%	7%	5%	7%	6%	7%

Q9: As far as you know, do you feel (SPLIT SAMPLE: the amount of financial support the Government of Canada provides to Canadians has) been (ROTATE ORDER: going up or going down), or staying the same in recent years? Base: Split sample – financial support, n=959. All sample sizes are unweighted numbers and all percentages are weighted results.

TREND IN FINANCIAL SUPPORT FROM THE GOVERNMENT IN RECENT YEARS							
		Region					
	Total (n=959)	ATL (n=178)	QC (n=197)	ON (n=261)	MB/SK/NU (n=94)	AB/NWT (n=83)	BC/YK (n=146)
Going up	28%	27%	27%	29%	23%	30%	28%
Staying about the same	36%	36%	45%	36%	28%	27%	32%
Going down	29%	32%	24%	29%	38%	35%	31%
Don't know	6%	6%	5%	5%	11%	8%	9%

Q9: As far as you know, do you feel (SPLIT SAMPLE: the amount of financial support the Government of Canada provides to Canadians has) been (ROTATE ORDER: going up or going down), or staying the same in recent years? Base: Split sample – financial support, n=959. All sample sizes are unweighted numbers and all percentages are weighted results.

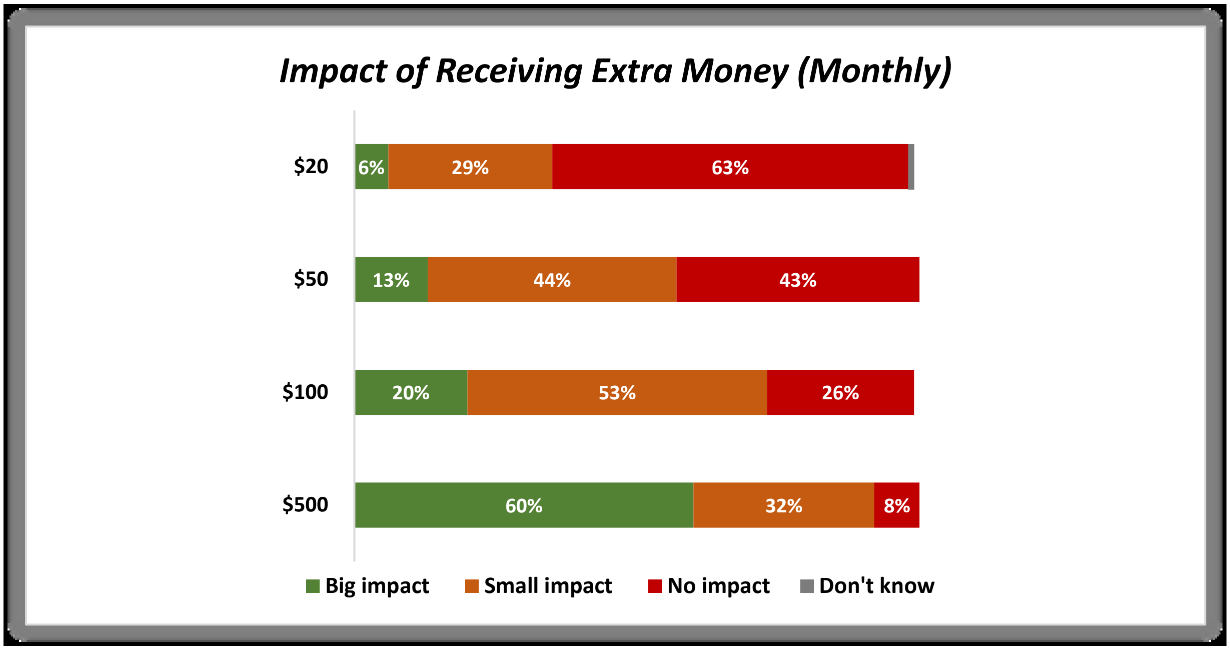
Respondents were asked to specify which taxes or financial supports have gone up or down. The main taxes that respondents believe to have gone up were personal income tax (36%), federal taxes in general (11%), GST (11%), provincial tax (10%), and HST (10%). The main taxes that respondents believe to have gone down include personal income tax (31%), federal tax (15%), GST (5%), and provincial tax (5%).

As for federal financial supports, the main items identified as having gone up include social assistance (29%), followed by child care tax benefit (24%), and "child support" in general (17%). Financial supports believed to have gone down include social assistance (25%), healthcare or medical (17%), income tax (12%), support for students (10%), and support for seniors (10%).

CHANGES IN TAXES/FINANCIAL SUPPORTS				
	Taxes Going Up (n=508)	**Taxes Going Down (n=72)**	**Financial Support Going Up (n=259)**	**Financial Support Going Down (n=294)**
Income tax / personal income tax / personal tax (general)	36%	31%	9%	12%
Federal tax	11%	15%	<1%	1%
GST	11%	5%	2%	1%
Provincial tax	10%	5%	2%	3%
HST	10%	4%	2%	1%
Property tax	9%	4%	2%	4%
Fuel / gas	8%	-	2%	3%
Carbon tax	7%	-	<1%	1%
Business tax	5%	8%	3%	5%
Municipal / city tax	2%	-	-	-
Social assistance	1%	4%	29%	25%
Healthcare / medical	1%	-	7%	17%
Students	1%	1%	7%	10%
Old age pension	1%	2%	6%	9%
Child care tax benefit	<1%	2%	24%	8%
Seniors	<1%	2%	2%	10%
Child support	-	2%	17%	6%
Other	8%	5%	12%	10%
Don't know	26%	30%	16%	20%

Q10: Which specific (TAXES/ FINANCIAL SUPPORTS) have been (GOING DOWN/GOING UP)? Base: Respondents specifying taxes/financial supports have been going up or down, n=1,133. All sample sizes are unweighted numbers and all percentages are weighted results.

Respondents were presented with one of four different financial scenarios and asked the extent to which it would impact their personal financial situation. Having an extra $20 per month would have a big impact on 6% of Canadians, a small impact on 29%, and no impact on 63% of respondents. An increase of $50 per month would have a big impact on one tenth of Canadians (13%), a small impact on 44% of Canadians, and no impact on 43% of Canadians. One in five Canadians (20%) feel an extra $100 per month would have a big impact on their financial situation, while an increase of $500 per month would have a big impact on 60% of Canadians.



Q11/Q12: If you received an extra (RANDOMIZE: $20/$50/$100/$500 a month), would this have (ROTATE ORDER: a big impact, a small impact) or no impact on your personal financial situation? Base: $20, n=468; $50, n=482; $100, n=474; $500, n=474. All sample sizes are unweighted numbers and all percentages are weighted results.

Respondents at least 35 years of age are more likely than younger respondents to say an increase of $100 per month would not have an impact on their personal finances (29% vs. 19%). Women are more likely than men to say receiving $500 extra per month would have a big impact on their finances (69% vs. 51%).

In terms of regional differences, residents in Quebec are the most likely to say an extra $20 per month would have no impact on their finances (72%), and those in Atlantic Canada are the most likely to say receiving $500 extra per month would have a big impact in their finances (71%).

IMPACT OF RECEIVING EXTRA MONEY (MONTHLY)						
		Gender		Age Group		
$20	**Total (n=468)**	Men (n=247)	Women (n=221)	18-34 (n=119)	35-54 (n=175)	55+ (n=175)
Big impact	6%	5%	8%	9%	5%	4%
Small impact	29%	27%	32%	35%	25%	30%
No impact	63%	66%	61%	56%	68%	66%
Don't know	1%	2%	-	-	2%	<1%
$50	**Total (n=482)**	Men (n=245)	Women (n=237)	18-34 (n=119)	35-54 (n=186)	55+ (n=174)
Big impact	13%	12%	14%	14%	9%	16%
Small impact	44%	42%	46%	48%	42%	42%
No impact	43%	46%	40%	38%	49%	42%
Don't know	<1%	-	<1%	-	<1%	-
$100	**Total (n=474)**	Men (n=243)	Women (n=231)	18-34 (n=122)	35-54 (n=171)	55+ (n=177)
Big impact	20%	19%	22%	24%	20%	18%
Small impact	53%	51%	56%	57%	49%	53%
No impact	26%	29%	23%	19%	29%	29%
Don't know	<1%	1%	-	-	1%	-
$500	**Total (n=474)**	Men (n=247)	Women (n=227)	18-34 (n=128)	35-54 (n=164)	55+ (n=179)
Big impact	60%	51%	69%	63%	60%	57%
Small impact	32%	38%	26%	30%	30%	35%
No impact	8%	10%	5%	7%	10%	7%
Don't know	<1%	<1%	<1%	-	1%	<1%

Q11/Q12: If you received an extra (RANDOMIZE: $20/$50/$100/$500 a month), would this have (ROTATE ORDER: a big impact, a small impact) or no impact on your personal financial situation? Base: $20, n=468; $50, n=482; $100, n=474; $500, n=474. All sample sizes are unweighted numbers and all percentages are weighted results.

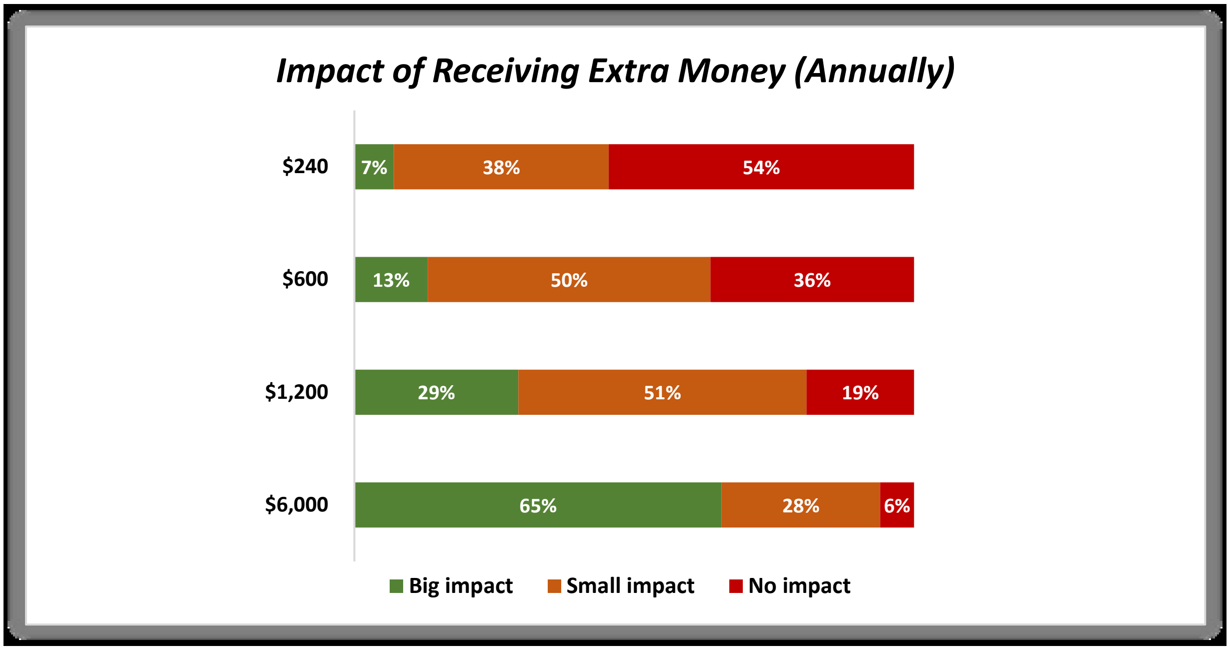
IMPACT OF RECEIVING EXTRA MONEY (MONTHLY)							
		Region					
$20	**Total (n=468)**	ATL (n=82)	QC (n=83)	ON (n=135)	MB/SK/NU (n=48)	AB/NWT (n=52)	BC/YK (n=68)
Big impact	6%	6%	1%	8%	10%	8%	6%
Small impact	29%	39%	27%	33%	34%	19%	24%
No impact	63%	55%	72%	58%	57%	70%	69%
Don't know	1%	-	-	1%	-	2%	1%
$50	**Total (n=482)**	ATL (n=91)	QC (n=96)	ON (n=138)	MB/SK/NU (n=47)	AB/NWT (n=37)	BC/YK (n=73)
Big impact	13%	17%	17%	12%	14%	16%	8%
Small impact	44%	45%	43%	44%	48%	46%	42%
No impact	43%	37%	40%	45%	38%	38%	50%
Don't know	<1%	1%	-	-	-	-	-
$100	**Total (n=474)**	ATL (n=94)	QC (n=92)	ON (n=119)	MB/SK/NU (n=40)	AB/NWT (n=51)	BC/YK (n=78)
Big impact	20%	21%	19%	24%	21%	24%	12%
Small impact	53%	48%	60%	51%	55%	47%	56%
No impact	26%	31%	21%	26%	23%	27%	32%
Don't know	<1%	-	-	-	-	3%	-
$500	**Total (n=474)**	ATL (n=81)	QC (n=91)	ON (n=128)	MB/SK/NU (n=51)	AB/NWT (n=46)	BC/YK (n=77)
Big impact	60%	71%	61%	63%	51%	56%	53%
Small impact	32%	20%	33%	27%	40%	36%	41%
No impact	8%	9%	5%	10%	7%	7%	6%
Don't know	<1%	-	1%	-	2%	-	-

Q11/Q12: If you received an extra (RANDOMIZE: $20/$50/$100/$500 a month), would this have (ROTATE ORDER: a big impact, a small impact) or no impact on your personal financial situation? Base: $20, n=468; $50, n=482; $100, n=474; $500, n=474. All sample sizes are unweighted numbers and all percentages are weighted results.

Respondents were presented with one of four additional scenarios and asked how these would impact their financial situation. In this case the amounts were the same but instead of receiving the money on a monthly basis, they would receive it annually.

Receiving an extra $240 per year would have a big impact for 7% of Canadians, 38% feel it would have a small impact, and over half (54%) believe this would have no impact on their financial situation. Receiving $600 per year would have a big impact for one tenth of Canadians (13%), a small impact for 50% of Canadians, and no impact for 36% of Canadians. Over one quarter of Canadians (29%) feel an extra $1,200 per year would have a big impact on their financial situation, while receiving $6,000 per year would have a big impact for 65% of Canadians.

Women are more likely than men to say receiving an additional $1,200 per year would have a big impact in their finances (35% vs. 22%), as well as receiving $6,000 yearly (71% vs. 58%). Those at least 55 years of age are more likely to say an additional $240 per year would have no impact on their finances.



Q13/Q14: If you received an extra (RANDOMIZE: $240/$600/$1200/$6000 a year), would this have (ROTATE ORDER: a big impact, a small impact) or no impact on your personal financial situation? Base: $240, n=524; $600, n=540; $1,200, n=519; $6,000, n=519. All sample sizes are unweighted numbers and all percentages are weighted results.

Quebec residents are the most likely to say an additional $600 per year would have a big impact on their finances (25%), while those in Alberta are the most likely to say this amount would have no impact on their situation (50%). Those in British Columbia/Yukon are the least likely to say receiving an amount of $1,200 would have a big impact on their finances (14%), and Quebecers are the most likely to say $6,000 would have a big impact on their financial situation (75%).

IMPACT OF RECEIVING EXTRA MONEY (ANNUALLY)						
		Gender		Age Group		
$240	**Total (n=524)**	Men (n=261)	Women (n=263)	18-34 (n=132)	35-54 (n=201)	55+ (n=190)
Big impact	7%	5%	8%	6%	8%	6%
Small impact	38%	38%	39%	50%	37%	32%
No impact	54%	57%	51%	44%	54%	62%
Don't know	1%	-	1%	-	1%	1%
$600	**Total (n=540)**	Men (n=260)	Women (n=280)	18-34 (n=118)	35-54 (n=216)	55+ (n=203)
Big impact	13%	10%	15%	15%	9%	15%
Small impact	50%	50%	51%	61%	48%	46%
No impact	36%	39%	33%	23%	42%	38%
Don't know	1%	1%	<1%	1%	<1%	1%
$1200	**Total (n=519)**	Men (n=243)	Women (n=276)	18-34 (n=129)	35-54 (n=195)	55+ (n=195)
Big impact	29%	22%	35%	42%	26%	23%
Small impact	51%	55%	48%	42%	52%	57%
No impact	19%	23%	16%	16%	22%	19%
Don't know	1%	<1%	1%	-	<1%	1%
$6000	**Total (n=519)**	Men (n=258)	Women (n=261)	18-34 (n=133)	35-54 (n=192)	55+ (n=190)
Big impact	65%	58%	71%	80%	60%	59%
Small impact	28%	35%	23%	18%	36%	29%
No impact	6%	7%	5%	2%	4%	11%
Don't know	1%	<1%	1%	1%	1%	1%

Q13/Q14: If you received an extra (RANDOMIZE: $240/$600/$1200/$6000 a year), would this have (ROTATE ORDER: a big impact, a small impact) or no impact on your personal financial situation? Base: $240, n=524; $600, n=540; $1,200, n=519; $6,000, n=519. All sample sizes are unweighted numbers and all percentages are weighted results.

IMPACT OF RECEIVING EXTRA MONEY (ANNUALLY)							
		Region					
$240	**Total (n=524)**	ATL (n=97)	QC (n=109)	ON (n=147)	MB/SK/NU (n=55)	AB/NWT (n=45)	BC/YK (n=71)
Big impact	7%	7%	8%	6%	5%	12%	4%
Small impact	38%	42%	42%	33%	40%	44%	40%
No impact	54%	51%	48%	61%	54%	44%	56%
Don't know	1%	-	1%	1%	2%	-	-
$600	**Total (n=540)**	ATL (n=82)	QC (n=111)	ON (n=159)	MB/SK/NU (n=57)	AB/NWT (n=53)	BC/YK (n=78)
Big impact	13%	11%	25%	10%	19%	8%	4%
Small impact	50%	58%	47%	50%	59%	41%	57%
No impact	36%	31%	27%	39%	23%	50%	40%
Don't know	1%	-	1%	1%	-	-	-
$1200	**Total (n=519)**	ATL (n=84)	QC (n=106)	ON (n=142)	MB/SK/NU (n=50)	AB/NWT (n=58)	BC/YK (n=79)
Big impact	29%	43%	31%	27%	41%	35%	14%
Small impact	51%	46%	55%	50%	36%	46%	65%
No impact	19%	11%	13%	24%	21%	20%	22%
Don't know	1%	-	2%	-	2%	-	-
$6000	**Total (n=519)**	ATL (n=89)	QC (n=112)	ON (n=132)	MB/SK/NU (n=52)	AB/NWT (n=58)	BC/YK (n=76)
Big impact	65%	70%	75%	61%	64%	55%	63%
Small impact	28%	26%	20%	30%	34%	39%	28%
No impact	6%	4%	4%	8%	2%	6%	8%
Don't know	1%	-	1%	1%	-	-	2%

Q13/Q14: If you received an extra (RANDOMIZE: $240/$600/$1200/$6000 a year), would this have (ROTATE ORDER: a big impact, a small impact) or no impact on your personal financial situation? Base: $240, n=524; $600, n=540; $1,200, n=519; $6,000, n=519. All sample sizes are unweighted numbers and all percentages are weighted results.

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 2018, 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 across the country: Moncton, NB, Toronto, ON, Calgary, AB, Vancouver, BC and Quebec City, QC, followed by a national telephone survey with 2,000 Canadian households.

Focus Group Phase

Quorus designed and translated the recruitment screener and the moderation guide for this study.

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.

Quorus recruited 12 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. A total of 80 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
Moncton, NB	Low / Middle Income	English	8	September 4 @ 5:30 pm
Moncton, NB	High Income	English	8	September 4 @ 7:30 pm
Toronto, ON	High Income	English	8	September 5 @ 5:30 pm
Toronto, ON	Low / Middle Income	English	8	September 5 @ 7:30 pm
Calgary, AB	Low / Middle Income	English	8	September 11 @ 5:30 pm
Calgary, AB	High Income	English	8	September 11 @ 7:30 pm
Vancouver, BC	High Income	English	8	September 12 @ 5:30 pm
Vancouver, BC	Low / Middle Income	English	8	September 12 @ 7:30 pm
Quebec City, QC	Low / Middle Income	French	8	September 17 @ 5:30 pm
Quebec City, QC	High Income	French	8	September 17 @ 7:30 pm

Each focus group lasted 2 hours and 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 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 (CPO 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.

  Statistics Canada has been reporting for many years that certain segments of the Canadian population are more likely to be CPO households, including younger Canadians and lower income households. By ensuring CPO households are included in the sample frame, the study has increased the likelihood of intercepting members of these segments who would otherwise be under-represented in a study depending exclusively on landline telephone numbers.

- 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 Finance Canada to then 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.
- 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 3rd and October 14th, 2018, which 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 6.7%. 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. In this report, all sample sizes/base sizes are unweighted numbers whereas all percentages are weighted numbers. The table below shows the weighting framework used for this study:

Region	Age	Gender	Sample	Population	Sample Proportion	Population Proportion
Atlantic	18-34	Male	42	222,090	2%	1%
	35-54	Male	70	307,225	4%	1%
	55+	Male	70	393,010	4%	1%
	18-34	Female	39	223,195	2%	1%
	35-54	Female	56	328,980	3%	1%
	55+	Female	71	441,760	4%	2%
Quebec	18-34	Male	60	848,240	3%	3%
	35-54	Male	91	1,098,170	5%	4%
	55+	Male	52	1,259,935	3%	4%
	18-34	Female	54	842,375	3%	3%
	35-54	Female	83	1,097,745	4%	4%
	55+	Female	60	1,434,410	3%	5%
Ontario	18-34	Male	66	1,488,190	3%	5%
	35-54	Male	88	1,791,660	4%	6%
	55+	Male	90	1,904,435	5%	7%
	18-34	Female	61	1,483,160	3%	5%
	35-54	Female	127	1,916,450	6%	7%
	55+	Female	110	2,182,830	6%	8%
MAN/SASK/NU	18-34	Male	29	280,210	1%	1%
	35-54	Male	43	304,900	2%	1%
	55+	Male	31	321,630	2%	1%
	18-34	Female	16	273,695	1%	1%
	35-54	Female	37	308,440	2%	1%
	55+	Female	44	360,515	2%	1%
AB/NWT	18-34	Male	27	513,370	1%	2%
	35-54	Male	27	580,280	1%	2%
	55+	Male	42	488,010	2%	2%
	18-34	Female	24	499,610	1%	2%
	35-54	Female	37	571,885	2%	2%
	55+	Female	43	522,120	2%	2%
BC/YT	18-34	Male	45	513,825	2%	2%
	35-54	Male	54	617,395	3%	2%
	55+	Male	71	728,230	4%	3%
	18-34	Female	37	506,560	2%	2%
	35-54	Female	37	658,480	2%	2%
	55+	Female	56	809,530	3%	3%
TOTAL			1,990	2,812,2545	100%	100%

- **Non-response bias.** Upon completion of this project a non-response analysis was conducted to assess the potential for non-response bias. Non-response is the result of a unit of the sample not participating in the survey—either refusing to take part in the survey (a refusal) or not being reached during the data collection period (non-contact). Non-response results in biases in the survey sample when there are differences between respondents and non-respondents.

  To undertake the analysis for this survey, the unweighted sample distribution by gender and age was compared to the actual population (based on 2016 Census figures from Statistics Canada).

  Consistent with most telephone surveys of the general public, age is a source of sample bias in the survey. As the table indicates, younger Canadians are under-represented and middle-aged Canadians are over-represented in the survey sample. The survey data was weighted to address these variations. Weighting also corrected the sample design for the survey, which was regionally disproportionate. Weighting serves to reduce bias should it be present, but not to eliminate it completely.

	Survey Sample (Unweighted)	Population (Census 2016)	% diff (+/-)
18-34	25.13%	27.36%	2.23%
35-54	37.69%	34.07%	-3.62%
55+	37.19%	38.57%	1.38%
Male	50.10%	48.58%	-1.52%
Female	49.90%	51.42%	1.52%

- This study saw a response rate of 6.7% across the entire sample. The response rate was higher for RDD dialing (8.2%) compared to calls made to cell phones (5.5%).

DIALING DISPOSITION REPORT

	TOTAL	RDD	CELL
Total Numbers Attempted	**111995**	**24575**	**87379**
Out-of-scope - Invalid	**74252**	**9128**	**65124**
Unresolved (U)	**13775**	**4621**	**9154**
No answer/Answering machine	69428	4621	9154
In-scope - Non-responding (IS)	**4102**	**1442**	**2660**
Language barrier	512	212	300
Incapable of completing (ill/deceased)	271	143	128
Callback (Respondent not available)	3319	1087	2232
Total Asked	**19866**	**9384**	**10441**
Refusal	16779	7880	8899
Termination	562	240	322
In-scope - Responding units (R)	**2525**	**1264**	**1220**
Completed Interview	2000	1000	1000
NQ - Quota Full	525	264	220
Refusal Rate	**87.29**	**86.53**	**88.32**
Response Rate	**6.69**	**8.18**	**5.48**
Incidence	**100.00**	**100.00**	**100.00**

Appendices

Focus Group Screener

Specifications

- Recruit 12 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.
- Specific considerations have been taken to accommodate for single vs. multi-income households.

Group 1 **Moncton** September 4 5:30 pm Low/middle income	**Group 2** **Moncton** September 4 7:30 pm High income	**Group 3** **Toronto** September 5 5:30 pm High income	**Group 4** **Toronto** September 5 7:30 pm Low/middle income	**Group 5** **Calgary** September 11 5:30 pm Low/middle income
Group 6 **Calgary** September 11 7:30 pm High income	**Group 7** **Vancouver** September 12 5:30 pm High income	**Group 8** **Vancouver** September 12 7:30 pm Low/middle income	**Group 9** **Quebec City** September 17 5:30 pm Low/middle income	**Group 10** **Quebec City** September 17 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 Quorus, a Canadian research firm. 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 ten 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: _______________

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 2017? **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 2017? **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:

Moncton *MQO* 720 Main Street, 3rd Floor
Toronto *Consumer Vision* 2 Bloor Street West, 3rd Floor
Calgary *Qualitative Coordination* 707 10 Ave SW #120
Vancouver *CRC Research* 1398 West 7th Avenue
Quebec City *Leger* 580, grande allée Est, suite 580

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, 12 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 $.
- Considérations spécifiques sont en place pour satisfaire les ménages seul vs. multi-revenues.

Groupe 1 **Moncton** 4 septembre 17 h 30 Faible/ moyen revenu	**Groupe 2** **Moncton** 4 septembre 19 h 30 Revenu élevé	**Groupe 3** **Toronto** 5 septembre 17 h 30 Revenu élevé	**Groupe 4** **Toronto** 5 septembre 19 h 30 Faible/moyen revenu	**Groupe 5** **Calgary** 11 septembre 17 h 30 Faible/moyen revenu
Groupe 6 **Calgary** 11 septembre 19 h 30 Revenu élevé	**Groupe 7** **Vancouver** 12 septembre 17 h 30 Revenu élevé	**Groupe 8** **Vancouver** 12 septembre 19 h 30 Faible/ moyen revenu	**Groupe 9** **Quebec City** 17 septembre 17 h 30 Faible/ moyen revenu	**Groupe 10** **Quebec City** 17 septembre 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 Quorus, une firme de recherche canadienne. 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 : ____________

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 2017? **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	**REMERCIER ET METTRE FIN À L'ENTRETIEN**
Non	

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:

Québec *Leger* 580, grande allée Est, suite 580

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) : ______________________________

Department of Finance
Focus Groups on the Economy
Summer 2018

September 6, 2018

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
    - The session will last approximately 2 hours
    - 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 – no names of participants will be used in any of the analysis or reporting.
    - The session is being audio and video-recorded for notetaking purposes only; there are a few observers behind the one-way glass who wanted to hear the conversation firsthand – they will respect participants' anonymity.
    - If you have a cell phone, please turn it off.
    - Any questions? ACCEPT BRIEF QUESTIONS BUT DO NOT LINGER.

Warm-up (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.
- Let's get started with a broad question. As you know we have three levels of government in Canada – federal, provincial and municipal. I want to focus specifically on the federal government. Could you each write down on paper what you think is the number one thing you think the federal government has been getting right over the last year? Then could you each write down what's the number one thing you think the federal government has been getting wrong in the last year?
- Let's hear what people wrote. What did people say was the thing the government has gotten right? …and what about what you feel they have been getting wrong?

Economy – General Discussion (15 minutes)

- Let's take a step away from discussing the government of Canada right now and just look at the economy in general. How would you say the Canadian economy as a whole is doing these days?
    - **PEN AND PAPER:** Just off the top of your head, what words would you use to describe the economy these days?
    - On what are you basing your answer? Can you give me some examples of "indicators" that are supporting your views of the economy?
- Would you say that things are better or worse than they were a year ago?
    - **IF BETTER OR WORSE:** In what way?
- How do you think the economy will be in the coming year? Do you think things will get better or worse next year? What is leading you to believe it will get better/worse?

Economic Challenges (60 minutes)

- **FLIP CHART:** What do you feel are some of the more important challenges facing the Canadian economy these days?
  - In other words, what are some of the weaknesses in our economy? …or what is getting in the way of our economy performing at its full potential?

Trade Negotiations (15 minutes)

- Have any of you seen, read or heard anything about trade negotiations currently happening between Canada and the United States?
  - What have you heard?
  - Do these negotiations even matter to you? In what way? / Why not?
  - How are you feeling these days about the trade talks? How do you feel about how the negotiations have been going?
  - Appreciating that negotiations involve some give and take - what should be the government's guiding principle when it comes to these negotiations?
- **IF NOT EXPLORED YET:** What have you heard specifically related to tariffs in the auto industry? **IF NEEDED:** A tariff is like a tax on specific imported goods – it is imposed by government and paid by importers. It makes that good more expensive in the country importing it.
  - What could be the impact of those kinds of tariffs?
  - What position would you want the government to take in relation to potential tariffs on the auto industry?

Trans Mountain Expansion Project (10 minutes)

- If we come back to discussing the economy in general, have any of you heard about the federal government's purchase of the Trans Mountain Expansion Project?
- What have you heard about this?
- What have you heard about the reasons why the federal government decided to purchase this project?
- Do you think the project will be built?

- What do you see as the benefits of this project?
  - **IF NEEDED:** Some have argued that Canada would get a better price for its oil if we exported it to global markets via the west coast compared to exporting it south to the US. What do you think of this?
  - **IF NEEDED:** Some have also argued that it would reduce our dependence on the U.S. as a buyer – by giving us better access to other markets for one of our major resources. What do you think of this?
- As far as you know does the project involve building an entirely new pipeline? **IF NEEDED:** The project involves twinning an existing pipeline.
- Were you aware that the acquisition includes a pipeline that makes money every year, even before the twinning is complete. Does this change the way you feel about the purchase?

Labour and Skills/ Talent (25 minutes)

Let's now explore the Canadian workforce – for any economy to succeed, it needs to have enough people working and it needs those people to have the right talent and skills.

- Regarding the **number of people working** in Canada – how are things going these days?
  - What makes you feel we have [*too many / too few/ just the right number of*] people willing to fill the available jobs?

  IF TOO LITTLE OR TOO MUCH:

  - What do you think has led to this situation?
  - What, if anything, would you expect the government of Canada to do to address this situation?
- If we stay focused on the number of workers needed to fill the jobs in Canada – how are things looking down the road? …say in 10 or 20 years? What shape do you suspect we'll be in then?
  - What makes you feel this way? What will lead to this?
  - **IF NEGATIVE OUTCOME:** What can be done to avoid this outcome? What, if anything, would you expect the government of Canada to do to address this situation?

- Let's turn our attention to **skills and talent** – do you feel our country's workforce has the right talent and skills to meet the needs of today's economy?
    - What/where are the gaps?
- **SHOW OF HANDS** When you think of your own career path, do you think it will be important for you to retrain or get new skills so that you can succeed in the workplace of the future?
        - What does "success in the workplace" mean to you (e.g., salary, stability)?
        - What are you doing to help yourself succeed at work? What will enable you to succeed?
        - What kind of challenges will make it difficult for you to succeed at work in the future? What may get in the way?
        - Are you currently facing challenges when it comes to trying to retrain or get new skills? What is getting in your way?
    - What, if anything, would you expect the government of Canada to do to address this situation?
    - Do you know about any of the federal programs to support Canadians who want to retrain or get new skills? What would help you access these programs?
    - If the Government of Canada were to launch a new financial support for lifelong learning, what do you think it should look like?
        - Should it be targeted to specific groups of workers, or provided to everyone regardless of income?
        - Should it be funded through premiums that employees and employers pay, like Employment Insurance, or some other way?
        - What about the amount made available per person?

Business Competitiveness (5 minutes)

Let's shift gears a bit and talk about operating a business in Canada. To succeed, a company needs to be competitive, and depending on the type of business, it needs to be globally competitive.

- In your own words, what does "being globally competitive" even mean?
- Can governments even play a role in helping Canadian businesses become or remain globally competitive?
- Do you think the government should be doing more or should they be stepping away from playing that kind of role?
    - In what kinds of situations should the federal government be doing more?
    - Do you believe the government should be particularly active or more active in helping certain sectors become or remain globally competitive? …if so, which ones?

General Fiscal Strategy (10 minutes)

- Now, I want to shift focus a bit to the Government of Canada's financial situation. First of all, what do you know about the government's financial situation?
    - Do they have a surplus (they took in more money than they spent) or a deficit (where they spent more than they took in)?
- In fact, the federal government has been running deficits for each of the last few years. How do you feel about that? Is it something that is a big concern for you personally, or is not that big a deal?
    - **IF CONCERNED:** Why does the deficit concern you?
    - How does this compare to other general concerns you manage on a day to day basis?
- How important is it to you that the federal government makes sure that the deficit doesn't get any bigger?
- Would you feel any differently about the following scenarios?
    - the deficit staying same size every year,
    - getting a bit smaller every year, or,
    - getting a bit bigger every year.

- And how do you generally feel about the trade-off of running deficits to invest in programs and infrastructure versus balancing the budget which means making cuts and/or raising taxes?
- Speaking of taxes…do you feel federal government taxes have been going up, going down, or staying the same in recent years?
    - Why do you feel that way? What taxes are you thinking of exactly?

Climate Change and Pricing Pollution (15 minutes)

We will shift gears again here and discuss climate change. This tends to mean different things to different people…

- What do you think is happening with climate change these days?
- Is it a concern for you?
- Has the federal government taken any steps to address climate change? What have you heard?
- We often hear about "putting a price on pollution" and "putting a cost on pollution" – when you hear that does it mean anything to you? What comes to mind? In your own words, what does this mean?
- How many have heard anything about the Government of Canada's plan to have a national price on carbon pollution?
    - How would you explain what the Government of Canada announced?

TIME PERMITTING - CLARIFY AS NEEDED:

The Government of Canada and virtually all provinces and territories announced a national approach to pricing carbon pollution two years ago. Under this approach, provinces and territories can decide what type of pricing system best suits their particular circumstances insofar as they meet certain basic standards. For example, the price on carbon pollution must start at a minimum of $10 per tonne in 2018 and rise by $10 a year to reach $50 per tonne in 2022.

Starting in 2019, the Government of Canada will implement a federal pollution pricing system in provinces and territories that request it (for some, this may be simpler than designing their own system). The government will also impose the federal system in provinces and territories that do not have a system that meets the basic national standards.

Under the federal pricing system, revenues collected from carbon pollution pricing in a specific province or territory will be returned to that province or territory.

- What do you think of this national approach to pricing carbon pollution?
- Do you think that it is the role of the federal government to impose a price on pollution in provinces and territories that do not want to put one in place or prefer to maintain their own pollution pricing system?
- What else should the federal government be doing to address climate change?

Wrap up (2 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.

We have covered a lot of topics today and really appreciate you taking the time and energy to come down here and share your opinion. Your input is very important. Before we finish, I wanted to ask you whether you have any last thoughts that you'd like to share with the Government of Canada about anything we've discussed today.

THANK YOU FOR PARTICIPATING!

Ministère des Finances
Discussions de groupe sur l'économie
Été 2018

6 septembre 2018

Introduction (5 minutes)

- Présentation de l'animateur
- Remerciements aux participants
- Description des objectifs de la discussion de groupe :
    - Les discussions de cette nature ont pour but de sonder vos *opinions* sur des enjeux, des idées ou des produits.
    - La séance durera environ deux heures.
    - Il ne s'agit pas d'un test de connaissances : il n'y a pas de bonnes ou de mauvaises réponses. Nous voulons simplement connaître vos opinions.
    - Vous avez le droit d'être en désaccord. Exprimez-vous, même si vous avez des opinions différentes des autres.
    - Vous n'êtes pas tenus de vous adresser à moi directement ; vous pouvez échanger avec les autres participants.
    - Ce soir, nous menons une étude pour le gouvernement du Canada. La discussion a pour but d'explorer les enjeux qui intéressent le plus les gens.
    - Nous vous demandons d'être sincères; vos commentaires demeureront confidentiels et seront présentés sous forme abrégée. Nous n'utiliserons aucun nom dans nos analyses ou notre rapport.
    - Pour simplifier la prise de notes, nous enregistrerons la séance sur bande audiovisuelle. De l'autre côté du miroir, des observateurs assisteront à la discussion. L'anonymat des participants sera respecté.
    - Veuillez éteindre vos cellulaires.
    - Avez-vous des questions avant de commencer ? ACCEPTER LES QUESTIONS COURTES, MAIS NE PAS S'Y ATTARDER PLUS LONGTEMPS QU'IL NE LE FAUT.

Introduction (10 minutes)

- J'invite chacun de vous à se présenter au reste du groupe. Donnez-nous votre prénom et parlez-nous un peu de vous, de vos passe-temps, etc.
- Commençons par une question de nature générale. Comme vous le savez sans doute, nous avons trois ordres de gouvernement au Canada : fédéral, provincial et municipal. J'aimerais parler du gouvernement fédéral. Je vous invite à noter sur la feuille devant vous la chose que le gouvernement fédéral a le mieux réussi au cours de la dernière année. Notez ensuite ce qu'il a particulièrement échoué durant la même période.
- J'aimerais connaître vos réponses. Quelles ont été les réussites du gouvernement ? Où a-t-il échoué ?

Économie – Discussion générale (15 minutes)

- Mettons de côté le gouvernement du Canada pour l'instant et parlons de l'économie en général. À votre avis, comment se porte l'économie canadienne ces jours-ci ?
  - **STYLO ET PAPIER :** Quels mots utiliseriez-vous pour décrire le climat économique actuel ?
  - Comment expliquez-vous votre réponse ? Pouvez-vous me donner des exemples d'indicateurs qui confirment vos opinions de l'économie ?
- Croyez-vous que la situation s'est améliorée ou s'est détériorée depuis l'an dernier ?
  - **IF BETTER OR WORSE:** De quelle façon ?
- Selon vous, comment l'économie se portera-t-elle dans la prochaine année ? Croyez-vous que la situation ira en s'améliorant ou en se détériorant ?

Défis économiques (60 minutes)

- **TABLEAU :** Selon vous, quels sont les principaux défis liés à l'économie canadienne ces jours-ci ?
  - Autrement dit, quelles sont les faiblesses de notre économie ? Qu'est-ce qui l'empêche de fonctionner à son plein rendement ?

Négociations commerciales (15 minutes)

- Avez-vous vu, lu ou entendu quoi que ce soit au sujet des négociations commerciales en cours entre le Canada et les États-Unis ?
  - Qu'avez-vous entendu ?
  - Ces négociations sont-elles importantes pour vous ? De quelle manière ? Pourquoi pas ?
  - Quelles sont vos impressions des négociations commerciales ? Que pensez-vous de la manière dont elles se déroulent ?
  - Compte tenu du fait que toutes négociations impliquent des compromis, quel devrait être le principe directeur du gouvernement en ce qui concerne ces négociations ?
- **SI LE SUJET N'A PAS ENCORE ÉTÉ ABORDÉ :** Qu'avez-vous entendu à propos des tarifs dans le secteur de l'automobile ? **AU BESOIN :** Un tarif est une taxe imposée par le gouvernement sur certains produits importés, et payée par les importateurs. Ce tarif a pour effet d'augmenter les prix des produits dans le pays qui les importe.
  - Quelles pourraient être les répercussions de ces tarifs ?
  - Quelle devrait être la position du gouvernement relativement aux tarifs qui pourraient être imposés au secteur de l'automobile ?

Projet d'agrandissement du réseau Trans Mountain (10 minutes)

- En ce qui concerne l'économie en général, avez-vous entendu parler de l'achat du projet d'agrandissement du réseau Trans Mountain par le gouvernement fédéral ?
- Qu'avez-vous entendu à ce sujet ?
- Qu'avez-vous entendu sur les raisons invoquées par le gouvernement fédéral pour justifier l'achat de ce projet ?
- Croyez-vous que le projet verra le jour ?

- Selon vous, quels sont les avantages de ce projet ?
    - **AU BESOIN :** Certains ont affirmé que le Canada obtiendrait un meilleur prix pour son pétrole s'il l'exportait vers les marchés mondiaux en passant par la côte Ouest plutôt que de transiter par le sud jusqu'aux États-Unis. Qu'en pensez-vous ?
    - **AU BESOIN :** D'autres ont fait valoir que cela réduirait notre dépendance aux États-Unis en tant qu'acheteur, en nous donnant un meilleur accès aux autres marchés pour commercialiser l'une de nos principales ressources. Qu'en pensez-vous ?
- Selon ce que vous avez entendu, sera-t-il nécessaire de bâtir un tout nouveau pipeline pour ce projet ? **AU BESOIN :** Le projet requiert qu'on double le pipeline actuel.
- Saviez-vous que cette acquisition concerne un pipeline qui réalise des profits chaque année, même si l'élargissement n'est pas encore terminé. Est-ce que cela change vos sentiments à propos de cet achat ?

Main-d'œuvre, compétences et habiletés (25 minutes)

Parlons maintenant de la main-d'œuvre canadienne. Pour qu'une économie se porte bien, il est essentiel d'avoir une main-d'œuvre suffisante et des travailleurs qualifiés.

- En ce qui concerne le **nombre de travailleurs** canadiens, comment vont les choses ces jours-ci ?
    - Qu'est-ce qui vous fait penser que nous avons [*trop/trop peu/assez*] de travailleurs pour occuper les emplois disponibles ?

    SI TROP OU TROP PEU :

    - Selon vous, quelles en sont les raisons ?
    - Qu'est-ce que le gouvernement du Canada devrait faire pour améliorer la situation ?
- Toujours en ce qui concerne le nombre de travailleurs requis pour occuper les emplois disponibles au Canada, quelle sera la situation à l'avenir, disons dans 10 ou 20 ans ? Quelle sera notre situation à ce moment-là ?
    - Pourquoi dites-vous cela ? Qu'est-ce qui entraînera cette situation ?
    - **RÉSULTAT NÉGATIF :** Que pourrait-on faire pour éviter cette situation ? Que devrait faire le gouvernement du Canada pour améliorer la situation ?

- Parlons maintenant des **compétences et habiletés**. Croyez-vous que nos travailleurs possèdent les compétences et les habiletés nécessaires pour répondre aux besoins de l'économie actuelle ?
    - Quelles sont les lacunes à combler ?
- **À MAINS LEVÉES :** Quand vous pensez à votre carrière, croyez-vous qu'il est important de vous perfectionner ou d'acquérir de nouvelles compétences pour réussir sur le marché de l'emploi de l'avenir ?
        - Que signifie « réussir sur le marché de l'emploi » pour vous (est-ce le salaire, la stabilité d'emploi) ?
        - Que faites-vous pour mieux réussir au travail ? Quels sont les facteurs qui vous permettront de réussir ?
        - Qu'est-ce qui vous empêchera de réussir au travail dans les années à venir ? Quels sont les obstacles que vous pourriez rencontrer ?
        - Devez-vous affronter des défis sur le plan du perfectionnement ou de l'acquisition de nouvelles compétences ? Quels sont les obstacles que vous devez affronter ?
    - Que devrait faire le gouvernement du Canada pour améliorer la situation ?
    - Avez-vous entendu parler des programmes fédéraux qui visent à aider les Canadiens qui le souhaitent à se perfectionner ou à acquérir de nouvelles compétences ? Que pourrait-on faire pour vous simplifier l'accès à ces programmes ?
    - Si le gouvernement du Canada lançait un nouveau programme d'aide financière pour la formation continue, à quoi devrait ressembler ce programme ?
        - Devrait-il cibler des groupes ou des travailleurs en particulier ou fournir l'aide à tous, peu importe le revenu ?
        - Devrait-il être financé par les employés et les employeurs, sous forme de cotisations, comme l'assurance-emploi, ou d'une autre façon ?
        - Quel devrait être le montant alloué par personne ?

Compétitivité des entreprises (5 minutes)

Changeons de sujet et parlons des entreprises au Canada. Pour réussir, toute entreprise doit être compétitive. Certaines d'entre elles doivent aussi pouvoir rivaliser sur le marché mondial.

- Selon vous, que signifie « rivaliser sur le marché mondial » ?
- Est-ce que les gouvernements peuvent faire quoi que ce soit pour aider les entreprises canadiennes à rivaliser sur le marché mondial ?
- Croyez-vous que le gouvernement devrait en faire davantage ou s'il devrait s'abstenir de faire quoi que ce soit ?
    - Dans quelles situations le gouvernement fédéral devrait-il en faire davantage ?
    - Croyez-vous que le gouvernement devrait être particulièrement actif ou plus actif pour aider certains secteurs à rivaliser sur le marché mondial ? Quels sont ces secteurs ?

Stratégie fiscale (10 minutes)

- J'aimerais maintenant parler de la situation financière du gouvernement du Canada. Premièrement, que savez-vous de la situation financière du gouvernement ?
    - Est-ce qu'il affiche un surplus (c.-à-d. que ses revenus sont supérieurs à ses dépenses) ou un déficit (c.-à-d. que ses dépenses sont supérieures à ses revenus) ?
- En réalité, le gouvernement fédéral a accumulé un déficit à chacune des dernières années. Que pensez-vous de cette situation ? Est-ce qu'elle vous préoccupe ou non ?
    - **PRÉOCCUPÉ :** Pourquoi le déficit vous préoccupe-t-il ?
    - En quoi est-ce différent de vos autres préoccupations quotidiennes ?
- Dans quelle mesure est-ce important pour vous que le gouvernement fédéral prenne les mesures qui s'imposent afin que le déficit n'augmente pas ?
- Auriez-vous des sentiments différents dans chacune des situations suivantes :
    - si le déficit demeurait le même chaque année
    - s'il diminuait un peu chaque année
    - s'il augmentait un peu chaque année
- Que pensez-vous du compromis qui consiste à accumuler un déficit pour investir dans les programmes et les infrastructures, plutôt que d'équilibrer le budget en effectuant des coupures ou en augmentant les taxes ?

- En parlant des taxes… diriez-vous que les taxes fédérales ont augmenté, ont diminué ou sont demeurées stables au cours des dernières années ?
    - Pourquoi dites-vous cela ? À quelles taxes pensez-vous ?

Changement climatique et tarification de la pollution (15 minutes)

Changeons de sujet encore une fois et parlons de changement climatique. Ce concept a une signification différente d'une personne à l'autre.

- Que se passe-t-il ces jours-ci avec le changement climatique ?
- Est-ce que cela vous préoccupe ?
- Est-ce que le gouvernement fédéral a pris des mesures pour contrer le changement climatique ? Qu'avez-vous entendu à ce sujet ?
- On entend souvent dire qu'il faut « tarifier la pollution ». Qu'est-ce que ça signifie pour vous ? Qu'est-ce qui vous vient en tête ? Décrivez-le dans vos propres mots.
- Combien parmi vous ont entendu parler du plan du gouvernement du Canada visant à fixer un prix national sur la pollution par le carbone ?
    - Comment expliqueriez-vous l'annonce faite par le gouvernement du Canada ?

SI LE TEMPS LE PERMET, CLARIFIER AU BESOIN :

Il y a deux ans, le gouvernement du Canada, avec l'ensemble des provinces et des territoires, a annoncé qu'il mettait de l'avant une approche nationale de tarification de la pollution par le carbone. Ainsi, les provinces et les territoires peuvent choisir le système de tarification le mieux adapté à leurs circonstances particulières, pourvu qu'ils respectent certaines normes fondamentales. Par exemple, le seuil minimum de tarification de la pollution par le carbone doit être fixé à 10 $ la tonne en 2018, et augmenter de 10 $ par année, pour atteindre 50 $ en 2022.

Dès 2019, le gouvernement du Canada mettra en place un système fédéral de tarification de la pollution par le carbone dans les provinces et les territoires qui le réclament (pour certains, ce sera plus simple que de concevoir leur propre système). Le gouvernement imposera le système fédéral dans les provinces et les territoires qui n'ont pas un système qui répond aux normes nationales fondamentales.

En vertu du système fédéral de tarification, les revenus provenant de la tarification de la pollution par le carbone dans une province ou un territoire en particulier seront remis à cette province ou ce territoire.

- Que pensez-vous de ce système national de tarification de la pollution par le carbone ?
- Croyez-vous que le gouvernement fédéral devrait imposer un tarif sur la pollution dans les provinces et les territoires qui ne souhaitent pas mettre en place un tel système ou qui préfèrent conserver leur propre système de tarification ?
- Quelles sont les autres mesures que pourrait prendre le gouvernement fédéral pour contrer le changement climatique ?

Conclusion (2 minutes)

Pendant que je consulte mes collègues dans l'autre salle pour voir s'ils ont d'autres questions pour vous, je vous invite à faire un petit exercice.

- Si vous disposiez d'un surplus de 200 $ chaque mois, que feriez-vous avec cet argent ? Soyez honnêtes ! Écrivez vos réponses sur la feuille devant vous. Nous en discuterons à mon retour.

Nous avons abordé plusieurs sujets aujourd'hui. Je vous remercie d'avoir pris le temps de venir nous rencontrer et partager vos opinions. Vos commentaires sont très importants. Avant de terminer, j'aimerais savoir si vous auriez autre chose à ajouter à l'intention du gouvernement du Canada.

MERCI DE VOTRE PARTICIPATION !

Survey Questionnaire

September 2018

Finance Canada Survey on Attitudes towards Canada's Economy (Fall)
Quorus

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. 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 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

E 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 price of gasoline

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 much of an impact do you feel each of the following have on **[SPLIT SAMPLE: HALF RECEIVE**: job creation in Canada / **HALF RECEIVE**: how competitive Canadian businesses are]? Please use a scale from 1 to 10, where 1 means no impact at all and 10 means it has a significant impact. .

(RANDOMIZE)

a) Federal government investments in infrastructure
b) Federal government investments in science, technology, and innovation
c) Federal government measures that provide money directly to Canadians like the Canada Child Benefit, and Guaranteed Income Supplement
d) Federal government investments in skills training
e) Business tax rates
f) The level of confidence international investors have in Canada
g) The global economy
h) The price of oil
i) NAFTA (**IF NEEDED:** the North American Free Trade Agreement)
j) Trade agreements with countries other than the U.S.

No impact at all	1
	2
	3
	4
	5
	6
	7
	8
	9
Significant impact	10

VOLUNTEERED

Don’t know	99

General Fiscal Situation

Q5. Let's turn our attention to the Government of Canada's finances. As far as you know, do you think it is operating with a budget surplus (it took in more money than it spent) or a deficit (where it spent more than it took in) or a balanced budget?

Deficit	1
Surplus	2
Balanced	3

VOLUNTEERED

Don't know	99

Q6. In fact, the federal government has been running deficits for each of the last few years. Over the next few years, do you think the deficit will (ROTATE ORDER: get bigger, get smaller) or stay the same size?

Get smaller	1
Stay the same	2
Get bigger	3

VOLUNTEERED

Don't know	99

Q7. How important is it for the Government of Canada to keep the following in mind when making Budget decisions? Please use a scale from 1 to 10, where 1 means it is not at all important and 10 means it is very important.

(RANDOMIZE)

a) The middle class
b) Job creation
c) Helping indigenous people
d) **(SPLIT)** Science / Innovation
e) **(SPLIT)** Feminism / Helping women and girls / Gender equality
f) The environment
g) Job skills
h) **(SPLIT)** Business competitiveness/making Canadian businesses successful internationally
i) **(SPLIT)** Making sure the deficit doesn't get any bigger/balancing the budget

Not at all important	1
	2
	3
	4
	5
	6
	7
	8
	9
Very important	10

VOLUNTEERED

Don't know	99

Q8. Which do you prefer? **READ AND ROTATE; ACCEPT 1 RESPONSE ONLY**

The Government of Canada invests in programs and infrastructure that can create jobs and economic growth, even if it means running deficits (or)	1
The Government of Canada works towards balancing the budget, even if it means making cuts to programs and/or raising taxes (or)	2
VOLUNTEERED Don't know	99

Q9. As far as you know, do you feel (**SPLIT SAMPLE**: federal income taxes have/the amount of financial support the Government of Canada provides to Canadians has) been (**ROTATE ORDER**: going up or going down), or staying the same in recent years?

Going down 1
Staying about the same 2
Going up 3

VOLUNTEERED
Don't know 99

Q10 **IF Q9=GOING DOWN OR GOING UP:** Which specific (TAXES/ FINANCIAL SUPPORTS) have been (GOING DOWN/GOING UP)?

OPEN END

HALF OF SAMPLE ASKED Q11/12:

Q11. If you received an extra (**RANDOMIZE**: $20/$50/$100/$500 a month), would this have (**ROTATE ORDER**: a big impact, a small impact) or no impact on your personal financial situation?

No impact 1
Small impact 2
Big impact 3

VOLUNTEERED
Don't know 99

Q12. And if you received an extra (**RANDOMIZE**: $20/$50/$100/$500 a month **CANNOT BE OPTION PRESENTED AT Q11**), would this have (**ROTATE ORDER**: a big impact, a small impact) or no impact on your personal financial situation?

No impact	1
Small impact	2
Big impact	3

VOLUNTEERED

Don't know	99

HALF OF SAMPLE ASKED Q13/14:

Q13. If you received an extra (**RANDOMIZE**: $240/$600/$1200/$6000 a year), would this have (**ROTATE ORDER**: a big impact, a small impact) or no impact on your personal financial situation?

No impact	1
Small impact	2
Big impact	3

VOLUNTEERED

Don't know	99

Q14. And if you received an extra (**RANDOMIZE**: $240/$600/$1200/$6000 a year **CANNOT BE OPTION PRESENTED AT Q13**), would this have (**ROTATE ORDER**: a big impact, a small impact) or no impact on your personal financial situation?

No impact	1
Small impact	2
Big impact	3

VOLUNTEERED

Don't know	99

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

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

Septembre 2018

Sondage de Finances Canada sur les attitudes envers l'économie canadienne (automne)
Quorus

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.

Vous êtes entièrement libre de participer. Cet appel pourrait être écouté ou enregistré à des fins de contrôle de la qualité. 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 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
65 ans ou plus	5
[NE PAS LIRE] Refuse de répondre	99

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

Femme	1
Homme	2

SONDAGE PRINCIPAL

Évaluation de l'économie

1A. (T) Songez aux enjeux auxquels le Canada doit faire face à l'heure actuelle ; selon vous, quel est celui sur lequel le gouvernement du Canada devrait concentrer davantage ses efforts ? **[NOTER LA PREMIÈRE RÉPONSE]**

[AUCUNE LISTE PRÉCODÉE – NOTE À L'INTERVIEWEUR : NOTER D'ABORD LA PREMIÈRE RÉPONSE. TOUTES LES AUTRES DOIVENT ÊTRE NOTÉES SUR L'ÉCRAN SUIVANT.]

99 – **[NE PAS LIRE]** Ne sait pas/refuse de répondre (PASSER à LA QUESTION 2)

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

INSCRIRE MOT POUR MOT - [PLUSIEURS RÉPONSES POSSIBLES]

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

Q2. (T) Comment évaluez-vous chacune des situations suivantes, sur une échelle de 1 à 10, où 1 signifie « terrible » et 10, « excellent » : **[PRÉSENTER EN ORDRE ALÉATOIRE DE b à f] RÉPÉTER L'ÉCHELLE AU BESOIN**

a. l'état actuel de l'économie canadienne
b. l'état actuel de l'économie américaine
c. l'état actuel de l'économie de **[PROVINCE]**
d. le prix de l'essence

Terrible	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
Ne sait pas	99

Confiance envers l'économie

Q4. Selon vous, quel est l'effet de chacune des mesures suivantes sur **[ÉCHANTILLON FRACTIONNÉ – LA MOITIÉ** : la création d'emplois au Canada/**L'AUTRE MOITIÉ** : la compétitivité des entreprises canadiennes] ? Veuillez utiliser une échelle de 1 à 10 où 1 signifie qu'elle n'a aucun effet et 10, qu'elle a un effet important.

(RANDOMISER)

a) Les investissements du gouvernement fédéral dans l'infrastructure
b) Les investissements du gouvernement fédéral dans le domaine des sciences, de la technologie et de l'innovation
c) Les mesures du gouvernement fédéral qui versent de l'argent directement aux Canadiens, comme l'Allocation canadienne pour enfants et le Supplément de revenu garanti
d) Les investissements du gouvernement fédéral dans la formation professionnelle
e) Les taux d'imposition des entreprises
f) La confiance des investisseurs internationaux envers le Canada
g) L'économie mondiale
h) Le prix du pétrole
i) L'ALENA (**AU BESOIN :** l'Accord de libre-échange nord-américain)
j) Les ententes commerciales avec les pays autres que les États-Unis

Aucun effet	1
	2
	3
	4
	5
	6
	7
	8
	9
Effet important	10
SANS AIDE	
Ne sait pas	99

Situation budgétaire

Q5. Parlons maintenant des finances du gouvernement du Canada. À votre connaissance, est-ce que le gouvernement affiche un surplus (c’est-à-dire que ses revenus sont supérieurs à ses dépenses), un déficit (c’est-à-dire que ses dépenses sont supérieures à ses revenus) ou un budget équilibré ?

Déficit	1
Surplus	2
Budget équilibré	3

SANS AIDE

Ne sait pas	99

Q6. En réalité, le gouvernement fédéral a affiché un déficit à chacune des dernières années. Au cours de la prochaine année, croyez-vous que le déficit (ROTATION : augmentera, diminuera) ou s’il demeurera stable ?

Diminuera	1
Demeurera stable	2
Augmentera	3

SANS AIDE

Ne sait pas	99

Q7. Dans quelle mesure est-ce important pour le gouvernement du Canada de tenir compte de ce qui suit pour prendre des décisions budgétaires ? Veuillez utiliser une échelle de 1 à 10 où 1 signifie « pas important du tout » et 10, « très important ».
(RANDOMISER)

a) La classe moyenne
b) La création d’emplois
c) L’aide aux Autochtones
d) **(FRACTIONNEMENT)** Les sciences et l’innovation
e) **(FRACTIONNEMENT)** Le féminisme, l’aide aux femmes et aux jeunes filles, l’égalité des sexes
f) L’environnement
g) Les compétences professionnelles
h) **(FRACTIONNEMENT)** La compétitivité des entreprises/le succès des entreprises canadiennes à l’international
i) **(FRACTIONNEMENT)** Réduction ou maintien du déficit/l’équilibre budgétaire

Pas important du tout	1
	2
	3
	4
	5
	6
	7
	8
	9
Très important	10
SANS AIDE	
Ne sait pas	99

Q8. Lequel de ces deux scénarios préférez-vous ? **LIRE LES RÉPONSES ET FAIRE UNE ROTATION : ACCEPTER UNE SEULE RÉPONSE.**

Le gouvernement du Canada qui investit dans les programmes et les infrastructures pour créer des emplois et stimuler l'économie, même si cela signifie d'avoir un déficit (ou)	1
Le gouvernement du Canada qui s'affaire à équilibrer le budget, même si cela signifie de faire des coupures dans les programmes ou d'augmenter les impôts ?	2
SANS AIDE Ne sait pas	99

Q9. Avez-vous l'impression que (**FRACTIONNEMENT** : l'impôt fédéral sur le revenu/le soutien financier que le gouvernement du Canada apporte aux Canadiens) (**ROTATION** : a augmenté ou a diminué) ou s'il est demeuré stable au cours des dernières années ?

A diminué 1
Est demeuré stable 2
A augmenté 3

SANS AIDE
Ne sait pas 99

Q10. **SI A RÉPONDU DIMINUÉ OU AUGMENTÉ À LA QUESTION 9** : Quels sont (les impôts/le soutien financier) qui ont (DIMINUÉ/AUGMENTÉ) ?

QUESTION OUVERTE

POSER LES QUESTIONS 11 ET 12 À LA MOITIÉ DE L'ÉCHANTILLON :

Q11. Si vous disposiez d'un montant supplémentaire de (**RANDOMISER** : 20 $/50 $/100 $/500 $ par mois), est-ce que cela aurait (**ROTATION** : un impact majeur, un impact mineur) ou aucun impact sur votre situation financière personnelle ?

Aucun impact 1
Impact mineur 2
Impact majeur 3

SANS AIDE
Ne sait pas 99

Q12. Si vous disposiez d'un montant supplémentaire de (**RANDOMISER** : 20 $/50 $/100 $/500 $ par mois - **NE PEUT PAS ÊTRE UNE OPTION PRÉSENTÉE À LA QUESTION 11**), est-ce que cela aurait (**ROTATION** : un impact majeur, un impact mineur) ou aucun impact sur votre situation financière personnelle ?

Aucun impact	1
Impact mineur	2
Impact majeur	3

SANS AIDE

Ne sait pas	99

POSER LES QUESTIONS 13 ET 14 À L'AUTRE MOITIÉ DE L'ÉCHANTILLON :

Q13. Si vous disposiez d'un montant supplémentaire de (**RANDOMISER** : 240 $/600 $/1 200 $/6 000 $ par année), est-ce que cela aurait (**ROTATION** : un impact majeur, un impact mineur) ou aucun impact sur votre situation financière personnelle ?

Aucun impact	1
Impact mineur	2
Impact majeur	3

SANS AIDE

Ne sait pas	99

Q14. Si vous disposiez d'un montant supplémentaire de (**RANDOMISER** : 240 $/600 $/1 200 $/6 000 $ par année **- NE PEUT PAS ÊTRE UNE OPTION PRÉSENTÉE À LA QUESTION 13**), est-ce que cela aurait (**ROTATION** : un impact majeur, un impact mineur) ou aucun impact sur votre situation financière personnelle ?

Aucun impact	1
Impact mineur	2
Impact majeur	3

SANS AIDE

Ne sait pas	99

PROFIL DÉMOGRAPHIQUE

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

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.**

6e 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 les 6 caractères de votre <u>code postal</u> ?

ACCEPTER LES TROIS PREMIERS CARACTÈRES SI C'EST TOUT CE QUE LE RÉPONDANT ACCEPTE 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 :

La langue de l'entrevue

Anglais	1
Français	2

Data Tables