



Qualitative and quantitative research to gauge the concerns and perceptions of Canadians related to the current state of the economy 2020

Final Report

Prepared for Finance Canada

Supplier Name: Environics Research

Contract Number: 60074-191692/001/CY

Contract Value: \$166,378.94 (including HST)

Award Date: 2019-12-18

Delivery Date: 2020-02-20

Registration Number: POR 054-19

For more information on this report, please contact Finance Canada at: stephanie.rubec@canada.ca

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Prepared for Finance Canada by Environics Research

March 2020

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PDF:

Cat. No. F2-276/2020E-PDF

ISBN 978-0-660-34125-5

Paper:

Cat. No. F2-276/2020E

ISBN 978-0-660-34126-2

Cette publication est aussi disponible en français sous le titre *Recherche qualitative et visant à évaluer les préoccupations et les perceptions des Canadiens en ce qui concerne l'état actuel de l'économie 2020 - Rapport final*

PDF:

Cat. No. F2-276/2020F-PDF

ISBN 978-0-660-34127-9

Paper:

Cat. No. F2-276/2020F

ISBN 978-0-660-34128-6

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Executive summary

Background and objectives

Finance Canada commissioned Environics Research Group to conduct qualitative and quantitative public opinion research among Canadians in the winter of 2020. The primary objective of the research was to explore current attitudes among Canadians towards such topics as:

- The state of the Canadian economy and Canadians' standard of living;
- Fairness of the tax system;
- Housing affordability;
- Keeping Canadians safe and healthy;
- Transition to a clean economy; and
- Reconciliation with Indigenous peoples.

The research objectives are to explore Canadians' overall concerns and perceptions about the current state of the Canadian economy and emerging issues, and their expectations about the role of the Government of Canada in the economy and in other measure intended to improve quality of life for Canadians.

Methodology

Qualitative phase

Environics Research conducted a series of 10 focus groups with members of the general population between January 27 and February 3, 2020. Two sessions each were conducted in Mississauga, Charlottetown, Calgary, Vancouver, and Montreal (Longueuil). Eight sessions were conducted in English and two were conducted in French. The sessions were distributed as follows:

Date and time	Group Location
January 27, 5:30 p.m. EST	Mississauga, Ontario
January 27, 7:30 p.m. EST	Mississauga, Ontario
January 28, 5:30 p.m. AST	Charlottetown, PEI
January 28, 7:30 p.m. AST	Charlottetown, PEI
January 30, 6:00 p.m. MST	Calgary, Alberta
January 30, 8:00 p.m. MST	Calgary, Alberta
February 1, 12:00 a.m. PST	Vancouver, B.C.
February 1, 2:00 p.m. PST	Vancouver, B.C.
February 3, 5:30 p.m. EST	Montreal (Longueuil), Quebec
February 3, 7:30 p.m. EST	Montreal (Longueuil), Quebec

In-person groups were conducted with adult Canadians 18 and over; participants included range of age, education, and backgrounds. The groups lasted approximately 120 minutes and consisted of between eight and 10 participants (out of 10 people recruited for each group). Participants were offered a \$100 honorarium to encourage participation and thank them for their time commitment.

Statement of limitations: Qualitative research provides insight into the range of opinions held within a population, rather than the weights of the opinions held, as would be measured in a quantitative study. The results of this type of research should be viewed as indicative rather than projectable to the population.

Quantitative phase

EnviroNics conducted a random-probability telephone survey with 2,000 adult residents of Canada, from January 17 to February 8, 2020, using industry-standard random-digit dialling (RDD) techniques. A survey of this size will yield results which can be considered accurate to within +/- 2.2 percentage points, 19 times out of 20. Margins of error are larger for subgroups of the population.

The sample was stratified by region to allow for meaningful coverage of lower population areas:

Region (% of population)	Sample Size	Margin of error*
Atlantic Canada (7%)	198	+/- 6.9
Quebec (23%)	497	+/- 4.4
Ontario (38%)	601	+/- 4.0
Prairies/NWT/Nunavut (19%)	399	+/- 4.9
B.C./Yukon (13%)	305	+/- 5.6
CANADA (100%)	2,000	+/-2.2

* In percentage points, at the 95% confidence level

Contract value

The contract value was \$166,378.94 (HST included).

Report

This report begins with an executive summary outlining key findings and conclusions, followed by a detailed analysis of the focus group findings and a detailed analysis of the survey data. Provided under a separate cover is a detailed set of “banner tables” presenting the results for all questions by population segments as defined by region and demographics. These tables are referenced by the survey question in the detailed analysis.

In this report, quantitative results are expressed as percentages unless otherwise noted. Results may not add to 100% due to rounding or multiple responses. Net results cited in the text may not exactly match individual results shown in the tables due to rounding.

Use of findings of the research. By gauging and analysing the opinions of Canadians, the Government of Canada gains insights into important policy areas related to the mandate of the department and related services. The information gained through this public opinion research will be shared throughout Finance Canada to assist it when establishing priorities, developing policies, and planning programs and services.

Key findings – qualitative phase

A. Overall assessment

Participants were asked to identify what they felt the federal government had been getting right and getting wrong over the past year.

- The issues the federal government was seen to have handled well in the past year included: foreign policy in general, the promotion of Canada's international image, dealing with the U.S. government, the renegotiation of NAFTA, having a pro-immigration policy and the legalization of cannabis. There was little mention of the economy in this context.
- The issues the federal government was seen to have handled poorly in the past year included: immigration policy and the integration of newcomers, the growing federal deficit and a general impression of lavish spending, pipelines – in Calgary, for not getting one built, but in Vancouver and Longueuil, for buying a pipeline and trying to push it through – and perceived inaction on climate change and on aboriginal reconciliation. There was little mention of the economy as a whole but there were some general comments about how life was increasingly unaffordable.

B. Focus on Canada's economy

Participants in most locations were generally satisfied with the overall state of the Canadian economy. When asked to come up with one word to describe the current Canadian economy, the most common words people used were quite positive, such as "stable," "fair," "steady," "just OK," "good" and "growing". To the extent that participants used more negative words to describe the economy, they said it was "expensive," "unbalanced," "depends," "bubble" and "fragile. In Calgary, people were very sensitive to the contrast between how the overall Canadian economy was performing and the struggling economy in Alberta and in Calgary in particular.

For the most part, the feeling was the economy would continue on its current trajectory. There were no strong opinions regarding the next 12 months – participants generally felt there was nothing to suggest the economy would take a turn for the worst. There was some perception of economic risks in the coming year, stemming from uncertainties caused by an unpredictable U.S. government administration, trade wars, and the reverberations from Brexit and other international issues. Some also noted we were "due" for a recession soon, since Canada had enjoyed so many years of economic growth.

Most participants were aware the federal government is currently running a deficit, but this was clearly not a major concern. To most participants, the deficit is "just a number" or a "necessary evil," and they wondered how the existence of it affected them personally. To the extent the deficit came up as a concern at all, it was among participants in Calgary, where some were under the impression it was "huge" and "unsustainable." Some vague concerns were also expressed about "our kids being left with a huge debt" if the deficit is never addressed; but, for the most part, people did not see this as an issue requiring any urgent action. There were some concerns that the government didn't seem to have any plan for ever balancing the budget. As much as the deficit is not a big issue for most people, for some it can be symbolic of reckless spending by the government. At the same time, most people also felt trying to achieve a balanced budget quickly would be too big a shock to economic stability.

C. Stress, affordability and quality of life

The things that cause participants the most stress in their lives: financial concerns/making ends meet/cost of living; personal debt; dealing with aging parents; housing affordability – either for themselves or for their children; personal issues (i.e., family/marital conflict); personal health issues; and being overworked/working in a stressful environment and not having time for family.

When participants were asked what particular costs or expenses concerned them or bothered them the most, the responses varied by region. Some costs came up in all locations such as the cost of food in grocery stores and the cost of telecommunications (i.e., cellphone and Internet fees). Some participants also mentioned more general financial concerns, such as the fear of not being able to save enough for retirement and personal debt interest payments. Housing costs were mentioned frequently in locations with inflated housing markets (i.e. Mississauga, Vancouver and Charlottetown).

For the most part, there was low awareness of any specific Government of Canada measures to help Canadians with affordability and cost of living issues. A few people mentioned loans for first-time homebuyers, and some with young families mentioned increases to the Canada Child Benefit (CCB). A couple of participants mentioned increases to Old Age Security or that the CRTC was looking into telecommunications charges. After prompting, many participants had also heard of the planned increase to the Basic Personal Amount, though most dismissed the tax savings from this as too small an amount phased in too gradually to be noticeable.

A “good quality of life” was generally defined as being able to do and afford the things we want, not worrying about money and being healthy. More specifically, people described a good quality of life as not having to live from paycheque to paycheque and being able to afford some leisure activities and extras such as vacations or eating out or attending/participating in cultural or sporting events/activities.

Participants were given a list of nine possible policies the Government of Canada could introduce and were asked to pick which ones they felt would be the most important to them personally. The measures most frequently selected were increasing old age security, as well as three measures relating to health care: access to a family doctor and nurse practitioner; national pharmacare; and improved access to mental health.

D. Transition to a clean economy

Most participants felt the federal government is not doing enough to address climate change. Some felt the government had talked a lot about climate change but had not taken any concrete steps. Others were aware of the fact that the federal government had imposed a carbon tax across the country and had vague awareness of other measures. Many felt that, as long as climate change continued to worsen, nothing the government was doing could be considered “enough.” Only in Calgary were there a few people who felt the government was doing too much. These participants tended to be against the imposition of the carbon tax and were concerned about the stalling of pipeline construction.

With regard to the economic impact of climate change, several participants noted the impact of a changing climate could be very detrimental to the economy, but the economic impact of taking measures to address climate change would likely benefit the Canadian economy. While some acknowledged there could be short-term damage to the oil and gas sector, they felt that, in the long run, combatting climate change was an economic plus.

When participants were asked what a transition to clean energy meant to them, they tended to describe increasing the use of renewable and low-carbon forms of energy, such as solar and wind energy. Or they spoke

of people driving electric cars. They virtually all saw this as something good, with the potential for Canada to make a more positive impact on the world.

With regard to the impact of a shift to clean energy on the oil and gas sector – outside of Calgary, most participants were quite unaware and felt these were “industries of the past,” and that there would have to be a shift to a new economy.

When participants were asked about what they thought would be an indicator of success in Canada’s efforts to address climate change, there was no clear consensus. Many were confused by the question or conflated climate change with simply having a cleaner environment in general and spoke of the air being cleaner and there being less smog.

Participants were given a list of possible policies the Government of Canada could introduce to address climate change, and asked to pick three which they felt would be the most important to them personally. Most were in favour of virtually all of the items listed, but tended to base their three choices on whether it was something they felt they could personally take advantage of, as well as whether it was a policy they saw as having a direct link to addressing climate change. For that reason, the two most popular policy options tended to be making zero-emission vehicles more affordable and helping Canadians make their homes more energy-efficient.

E. Health care

Awareness of the concept of pharmacare varied from community to community. Most participants who had heard of pharmacare understood it would mean some sort of universal program giving Canadians free access to prescription drugs. Most participants know there are currently many Canadians who have to pay out-of-pocket for their drugs, and who may or may not be able to afford it. For the most part, participants also agreed that, in Canada, no one should have to go without medically necessary prescription drugs due to an inability to pay. It was said several times that having some sort of public system to cover drug costs was “the right thing to do.”

The goal of making prescription drugs accessible to all Canadians was seen as an example of the kind of thing tax dollars should be going toward. Several participants acknowledged that, while pharmacare would likely cost governments a lot of money initially, it could save money in the end due to people taking the drugs they need and staying healthier, and government potentially being able to negotiate better bulk pricing from drug companies.

The salience of the issue of better access to family doctors varied a great deal from location to location. In Vancouver, Longueuil and Charlottetown, participants spoke of there being major local challenges with getting a family doctor. In other locations, this was less of a concern. When asked what the federal government could do to help ensure access to family doctors, many people had no specific recommendation, as they saw this as a complex issue.

When participants were asked about other health care-related priorities for the federal government, there was again some confusion as to what exactly the federal role would be in the delivery of health care. People suggested such things as more mental health programs, more medical equipment (i.e., MRIs, etc.), more staff for hospitals – it was noted there are lots of hospitals, just not enough staff to make full use of them – and more health promotion and prevention.

F. Community safety

When the concept of “safer communities” was raised, most participants felt it could refer to safety in a number of ways, such as from crime, from natural disaster, dangerous traffic and environmental pollution. Participants in all locations generally felt they lived in a relatively safe community already and it was clear this was really not a major top-of-mind concern to most people, beyond some localized concerns about car break-ins in Vancouver.

When participants were asked what sorts of measures they would like to see the federal government undertake to make communities safer, there was often initial confusion as to what measures would be under federal jurisdiction. To the extent that people did want to see action from the federal government, they mentioned having more police presence on the streets, tougher laws to make sure criminals are not set free, more investment in mental health and drug addiction, more CCTV cameras and better street lighting.

Most participants were surprised to know military-style assault rifles were not already illegal in Canada. The overwhelming consensus was that these sorts of weapons should be banned, and many people went further to say all handguns should be banned as well. However, it was clear that, for most people, the desire to see military-style assault rifles banned came from a values-based distaste for guns in general and for “American-style gun culture” – and not because people saw this as a way to make them feel personally safer or make their own communities safer.

When prompted, there was universal support for measures such as trying to stop the flow of weapons across the border and helping cities deal with gang-related violence – even if the gang issue was seldom identified as a concern in these communities.

Key findings – quantitative phase

A. Assessment of the economy

Canadians’ assessment of the economy, both nationally and provincially, remains comparable to February 2019. On the current state of the national economy, over four in ten (45%) have a positive perception while two in ten are negative (19%). Confidence in provincial economy continues to vary by locality.

Consistent with last year, residents of B.C. (51%) and Quebec (58%) are the most likely to feel their province’s economy is doing well, while Albertans (21%) have the least positive outlook. Meanwhile, perceptions of gas prices have shifted somewhat to be less positive than last year (22%, from 29% in 2019).

B. Personal financial situation

Like perceptions of the national economy, just over half of Canadians report their personal financial situation as good (score from 7 to 10), a stable proportion from previous years.

Common household expenses do not impact Canadians equally: over one in ten (14%) indicate they do not pay for prescription drugs and half (50%) do not experience costs associated with raising children. Among those for whom specific costs are applicable, only one in ten say weekly groceries (13%), monthly internet services (12%) and child-related costs (11%) are very affordable (score 9-10). Prescription drugs are found to be very affordable by a higher proportion of users (28% selecting 9-10), likely because a portion of these costs are covered by prescription drug coverage of some kind.

C. Government budget priorities

Of seven priority issues for making budget decisions, Canadians are most likely to say it is very important for the Government of Canada to ensure the wealthiest pay their fair share (58% rate as 9 or 10). The next most important priorities are to improve community safety (49%), to help Canadians get a good job (48%), and to fight climate change (48%). Just under half (45% each) prioritize supporting middle-class (either to make life more affordable or to improve quality of life), and just over four in ten (42%) give this rating for implementing pharmacare.

D. Level of well-being

Majorities of Canadians believe their generation's level of well-being has improved compared to their parents', specifically regarding educational opportunities (68%) and health (58%), while just under half (46%) say their overall quality of life is also better. While these social opportunities are believed to have flourished, Canadians are less optimistic about the changing economic landscape. Canadians are divided about whether their employment opportunities are better (36%) or worse (38%) than their parents at the same age, and they are more likely to be negative about financial security, with four in ten saying they are worse off than their parents (42%, vs. 33% better off).

E. Tax system

Strong majorities think low-income earners (69%) as well as small businesses (52%) should be paying less tax. Opinion is basically divided as to whether middle-income earners are paying the proper amount of tax currently (45%) or if they should be paying less (48%). Seven in ten Canadians agree that top income earners (71%) and big corporations (75%) should each be paying more in tax.

F. Affordable housing and helping first-time homeowners

As in 2019, strong majorities of Canadians agree to some extent it is very difficult for people to buy a house today (70% score 7 to 10), and that the government has a responsibility to address affordable housing (68%). Home ownership remains extremely important to Canadians: eight in ten (80%) homeowners agree they felt it was extremely important that they own a home rather than rent, and over six in ten (63%) renters say it is very important they be able to buy a home in the future; these results are also similar to 2019.

However, Canadians are feeling the economic pinch: just under six in ten homeowners (56%, down somewhat from 63% in 2019) agree the costs of living in their home are affordable on their current household income, and just under half (48%) of renters say their rent is affordable (48%, down from 53%). Also consistent with 2019, only a minority of one-third (32%) agree it would be easy to find an affordable and safe home if they needed to relocate today.

Half of Canadians say increasing the availability of affordable housing (51%) and requiring developers to ensure at least 20% of new housing is affordable (49%) should be high priorities for the Canadian government (score 9 or 10), and a close proportion (46%) say this about making monthly mortgage payments more affordable for middle- and lower-income Canadians. Around four in ten each place high priority on continued incentives for first-time home buyers (43%) and continued investment in community housing (41%).

G. Keeping Canadians safe and healthy

The safety measure specifically assessed in the quantitative phase of this research related to addressing gun violence. Canadians generally believe each of four approaches covered in the survey would be at least somewhat effective at addressing gun-related violence. A six-in-ten majority (58%) indicate banning military-style assault rifles would be a very effective measure (score 9 or 10) and just under four in ten give this rating to buying back privately owned assault rifles (36%), although it should be noted that confidence in both of these approaches is notably lower in the Prairies. Around four in ten each believe law enforcement funding approaches would be very effective, including funding to fight gang-related violence at the municipal level (42%) and for gun-related law-enforcement in general (38%), but these opinions are more uniform nationally.

H. Transition to a clean economy

Canadians are split in their opinion of the federal government's fight against climate change, with similar proportions rating current actions taken as good (27% scoring 7 to 10), neutral (35% scoring 5 or 6), and bad (32% scoring 1 to 4). They are twice as likely to say performance on this file is very bad (16%) than very good (7%).

Each of five environmental measures to reduce pollution and protect the environment are considered at least somewhat effective. Just under half of Canadians (46%) think planting two billion trees will be very effective, while around four in ten each think the other assessed measures would be very effective (that is, more affordable zero-emission vehicles, business incentives for clean technologies, increasing inland land and water protections, and help with the energy efficient and climate resilience of Canadian homes).

I. Reconciliation

Canadians have varying levels of confidence in the effectiveness of six different approaches to reconciliation with Indigenous peoples. Focusing on the future, improving access to physical and mental healthcare services was the approach most felt to be very effective, by nearly half of Canadians (47% scoring 9 or 10), followed by continuing to implement the recommendations of the *National Inquiry into Murdered and Missing Indigenous Women and Girls* (44%) and promoting economic development and self-reliance (40%). Canadians are less likely to view as very effective approaches that focus on righting past wrongs: compensating indigenous victims of the child welfare system (29%) and official apologies (25%); in fact, close to two in ten (17%) would go so far as to describe official apologies as not at all effective (score 1 or 2).

Political neutrality statement and contact information

I hereby certify as senior officer of Environics that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada, and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.

Derek Leebosh
Vice President, Public Affairs
Environics Research Group
derek.leebosh@environics.ca
(416) 820-1963

Supplier name: Environics Research Group
PWGSC contract number: 60074-191692/001/CY
Original contract date: 2019-12-18
For more information, contact Finance Canada at stephanie.rubec@canada.ca

Introduction

Finance Canada commissioned Environics Research Group to conduct qualitative and quantitative public opinion research among Canadians in the winter of 2020. The primary objective of the research was to explore current attitudes among Canadians towards such topics as:

- The state of the Canadian economy and Canadians' standard of living;
- Fairness of the tax system;
- Housing affordability;
- Keeping Canadians safe and healthy;
- Transition to a clean economy; and
- Reconciliation with Indigenous peoples.

The research objectives are to explore Canadians' overall concerns and perceptions about the current state of the Canadian economy and emerging issues, and their expectations about the role of the Government of Canada in the economy and in other measure intended to improve quality of life for Canadians.

Background

The Department of Finance requires research to obtain information on the public environment into which the Government's actions will be communicated. It is important for the Department of Finance Canada to conduct public opinion research to provide a clear and current sense of the evolution of the public mood towards the state of the economy, sense of personal economic well-being and Government actions in the economic sphere, in order to remain current on the public environment into which Government actions will be communicated.

I. Detailed findings – qualitative phase

A. Overall assessment

At the start of each session, participants were asked to identify what they felt the federal government had been getting right and getting wrong over the past year.

What the government has handled well

The issues the federal government was seen to have handled well in the past year included: foreign policy in general and the promotion of Canada's international image, dealing with the U.S. government – particularly in the context of the recent renegotiation of NAFTA – and having a pro-immigration policy. Some also gave the government credit for promoting gender equality, inclusiveness and diversity. While some participants mentioned a stable economy and low unemployment, for the most part they did not cite issues relating to the economy in this context. There were some mentions of the increase in CCB benefits for families with kids; and some made specific reference to the government and the prime minister's handling of the Ukraine Air crash in Iran.

Some participants in Charlottetown and in Longueuil mentioned the fact that the government was doing something about climate change with the carbon tax, and cited funding for health care or just maintaining the public health care system. Some in Mississauga mentioned funding for transportation. It was notable how, well over a year after the legalization of cannabis, it was still frequently mentioned as one of the best things the federal government has done in the recent past – even if the provincial implementation sometimes leaves a bit to be desired.

What the government has handled poorly

The issues the federal government was seen to have handled poorly in the past year included: allowing in too many immigrants and not doing enough to integrate those already here, the growing federal deficit and a general impression of lavish spending, a perceived mishandling of the roll out of cannabis legalization, pipelines – in Calgary, for not getting one built, but in Vancouver and Longueuil, for buying a pipeline and trying to push it through. While some had given the government high marks in general for its handling of Aboriginal issues and reconciliation this also came up as a negative, with some participants claiming there had been inaction when it came to actually dealing with the reconciliation issue (i.e., “all talk and no do”). The government's handling of climate change also came up as a negative, with some citing the carbon tax – which they disapproved of – and others criticizing the government for not doing enough on climate change. Some people mentioned the government's handling of the SNC Lavalin affair.

While there were few mentions of economic issues in this context, some participants made general comments about how prices were rising and wages were stagnant, and that life was increasingly unaffordable. There was also some mention of the CMHC stress test being too strict and making it too difficult for people to buy homes. In Calgary in particular, equalization came up in this context and was criticized as a policy that was taking money from Alberta and giving it to Quebec. Some participants also criticized the government for its handling of relations with China.

B. Focus on Canada's economy

General assessments

Participants in most locations were generally satisfied with the overall state of the Canadian economy. When asked to come up with one word to describe the current Canadian economy, the most common words people used were quite positive, such as “stable,” “fair,” “steady,” “just OK,” “good” and “growing.” To the extent that participants used more negative words to describe the economy, they said it was “expensive,” “unbalanced,” “depends,” “bubble” and “fragile.” People had more mixed views about how the economy was doing in Calgary, where people were very sensitive to the contrast between how the overall Canadian economy was performing and the economy in Alberta and in Calgary in particular. The consensus was that, while the economy was fine in the east, in Alberta the economy was described as something that “sucks.” Calgary participants had a perception that the federal government was not doing enough to defend the oil and gas industry and would again raise the issue of equalization.

When asked to elaborate, participants pointed out Canada's economy was doing relatively well, both historically speaking and when compared to other countries. They noted there is low unemployment, lots of places cannot find staff, people are spending, inflation is under control, stocks are rising, etc. Those who felt the economy was not doing so well pointed to factories closing, and massive job losses in the oil and gas sector. They also noted the economy as a whole might be doing well statistically, but that the wealth was not being well-distributed, the cost of living is high and rising, and many people are living paycheque to paycheque. The issue of housing was also raised spontaneously in several locations in this context. In Mississauga, Vancouver and Charlottetown, it was noted that housing was now totally unaffordable, and rents and housing prices were out of control; while Calgary is facing the opposite problem, with people talking about falling prices and losing their homes.

The Canadian economy looking ahead

For the most part, the feeling was that the economy would continue its current trajectory. There were no strong opinions regarding the next 12 months – participants generally felt there was nothing to suggest the economy would take a turn for the worst. Those who felt things were going well believed this would continue, and those who felt the economy was not doing well felt nothing would change on that front either (i.e., things would continue to be too expensive, they will continue to struggle to make ends meet, etc.). In most locations, that meant modest economic growth and low unemployment would continue.

In Calgary, people were quite pessimistic and expected the recession in the oil and gas sector to continue. While most felt things had been stable economically over the past couple of years, there was also concern there could be storm clouds and dangers on the economic horizon. Participants talked of how there were risks in the coming year, stemming from uncertainties caused by an unpredictable U.S. government administration, trade wars, and the reverberations from Brexit and other international issues. Some also noted we were “due” for a recession soon, since Canada had enjoyed so many years of economic growth. They pointed out Canada could be at the end of an economic cycle, and now has nowhere to go but down. Several participants also noted household debt was very high in Canada, which could make Canada vulnerable if there was a new economic downturn.

In Mississauga and Vancouver in particular, there were fears the housing “bubble” could burst and cause economic uncertainty. Some participants also expressed concern over perceptions of excessive federal government spending, which some felt was not based on any strategic plan to eventually balance the budget.

Debt and deficit

Most, though not all, participants were aware the federal government is currently running a budgetary deficit, though many did not always understand the difference between the deficit and the accumulated national debt. A number of participants simply had no idea what the federal budget situation was. As has been noted in previous years, many were under the impression that there was “always a deficit” and “every country in the world” had one. Some just assumed deficits as a fact of life, since “that is how it has always been.” Others noted there was nothing wrong with having a deficit as long as the money was being spent on the right things; and they noted that money spent on infrastructure could help build up the economy in the long run. On the other hand, some wondered that, if the government seemed oblivious to the deficit when the economy was doing well, what would happen when the government might have to deal with a recession down the road?

All in all, the deficit was clearly not a major preoccupation for most participants. Very few mentioned it spontaneously as a concern, and it was generally seen as not a big deal. To the extent that the deficit came up as a concern at all it was among participants in Calgary, where some were under the impression that it was “huge” and “unsustainable.” To most participants the deficit is “just a number” or a “necessary evil,” and they wondered how the existence of a deficit affected them personally. Some vague concerns were also expressed about “our kids being left with a huge debt” if the deficit is never addressed, but, for the most part, people did not see this as an issue requiring any urgent action. A few participants raised the issue of what would happen if interest rates went way up and the government had to pay much higher interest on the debt. Several also noted that, while the deficit might not be keeping them up at night, they were still concerned the government didn’t seem to have any plan for ever balancing the budget. As much as the deficit is not a big issue for most people, for some it can be symbolic of reckless spending by the government. Several participants noted that they were willing to pay taxes and put up with deficits as long as they felt the government was spending money wisely and had the right priorities.

Although many participants expressed a desire for the government to have some sort of a plan to get back into a state of budgetary equilibrium, there was little appetite for trying to balance the budget quickly (e.g., in the next 1 or 2 years). This was seen as potentially drastic and disruptive and, in some locations, the idea of doing this brought back bad memories of past provincial and federal governments bringing in draconian cuts to programs to balance the budget. Most people felt that trying to achieve a balanced budget quickly would be too big a shock to economic stability; and there was no support for increasing government revenues through paying higher taxes. It was notable that in Longueuil participants repeated the claim Quebecers are already the most heavily taxed people in North America.

C. Stress, affordability and quality of life

Sources of stress

Participants were asked to describe what single thing was causing them the most stress in their lives. Some stress factors came up consistently in all locations and others were more location-specific. The most common themes that came up in almost all groups included:

- Financial concerns/making ends meet/cost of living – everything is getting more expensive and income is not keeping up
- Personal debt

- Dealing with aging parents
- Housing affordability – either for themselves or for their children
- Personal issues (i.e., family/marital conflict)
- Personal health issues
- Being overworked/working in a stressful environment and not having time for family

Certain factors leading to stress were raised in some locations more than others. In Vancouver, some participants were most stressed by fears about environmental degradation and climate change, or instability in the world. In Calgary, people were more stressed about the possibility of losing their job or home, or of their assets losing value. In Mississauga housing concerns came up a lot, as did the affordability of post-secondary education for their children. In Longueuil, people raised the issue of being stressed by the precariousness of work (i.e., unpredictable shifts and a lack of a long-term contract), as well as being stressed by traffic conditions. In Charlottetown, some participants volunteered they did not feel very stressed about anything, while others identified personal health concerns.

Financial concerns

As noted previously, while some participants specifically identified personal financial issues and challenges as stressing them the most, a number of other issues also emerged. All participants were therefore asked what particular costs or expenses concerned them or bothered them the most. As was the case with the discussion around general stresses, the answers to this question varied somewhat from community to community. There were some specific expenses mentioned consistently in all locations, such as the cost of food in grocery stores and the cost of telecommunications (i.e., cellphone and Internet fees). Other specific financial issues included housing/rent (particularly in Charlottetown, Mississauga and Vancouver), utilities such as hydro rates, car insurance, tuition and student loans, and childcare and out-of-pocket medical expenses (i.e., prescription drugs, devices and services not covered either by the province or by private insurance). In Vancouver, the price of gasoline was also mentioned. Some participants also mentioned more general financial concerns, such as the fear of not being able to save enough for retirement, and personal debt interest payments (e.g., credit card debt).

Awareness of government measures

For the most part, there was low awareness of any specific Government of Canada measures to help Canadians with affordability and cost of living issues. A few people mentioned loans for first-time homebuyers, and some with young families mentioned increases to the Canada Child Benefit (CCB). A couple of participants mentioned increases to Old Age Security or that the CRTC was looking into telecommunications charges; and some had some vague recollection of unspecified tax credits, though it was unclear if these were actually federal or provincial programs. A few also spontaneously mentioned the planned increase in the Basic Personal Amount (BPA) that is exempt from income taxes.

After asking specifically about changes to tax rates, quite a few participants mentioned they had heard something about the “basic personal exemption” being raised. After it was explained that the BPA was to be gradually raised to \$15,000 by the year 2023 and that it would save most Canadians about \$300 a year in taxes, about half of participants remembered hearing something about this. Reactions to this measure were very mixed. Some participants felt that it was “better than nothing” and that any measure saving them some money was a step in the right direction, but most reacted quite negatively, cynically pointing out it amounted to no

more than a dollar a day, it was just a “drop in the bucket” and that, with it being phased in over three years, no one would even notice it. Some felt that even if they saved \$300 from this measure, it would be eaten up by rising prices and would barely make up for the cancellation of some tax credits (i.e., transit and children’s sports). Some were also confused by how this would work and thought it only saved money for people who earned up to \$15,000 per year.

Definition of quality of life

Before participants were asked to look at a list of possible government measures that could relate to their quality of life, they were asked what having a good quality of life meant to them. A “good quality of life” was generally seen as being able to do and afford the things we want, not worrying about money (but not necessarily being rich) and being healthy. More specifically, people described a good quality of life as not having to live from paycheque to paycheque and being able to afford some leisure activities and extras such as vacations, eating out, or attending/participating in cultural or sporting events/activities. Some also viewed it as having more quality time (e.g., less time working, and more time for themselves or to spend with family/kids). These participants described a good quality of life in terms of having a good work/life balance and having time for friends and family.

There were some regional differences in how participants responded to this question. In Charlottetown, people were more likely to mention being loved, and having supportive friends and family. In Calgary, there was more of a focus on financial security and being debt-free. In Vancouver, some mentioned having a clean environment (e.g., clean air and water and lots of green spaces) was a major part of good quality of life. Some participants also noted that having access to public health care and education, and just living in a free and democratic society, were elements of a good quality of life.

Support for policies

Participants were given a list of nine possible policies the Government of Canada could introduce and asked to pick which three of the nine they felt would be the most important to them personally. The circulated list included the following items:

- Increase the CPP and QPP Survivor Benefit
- Increase the Canada Student Grants
- Implement a national pharmacare system
- Improve access to mental health services
- Improve access to a family doctor and nurse practitioner
- Make parental benefits tax-free
- Increase Old Age Security
- Invest in drug addiction care
- Increase the Canada Child Benefit (CCB)

The most popular and frequently selected measures were increasing old age security, as well as three measures relating to health care: access to a family doctor and nurse practitioner, national pharmacare and improved access to mental health. The reasons some participants gave for their policy choice were as follows:

Increase Old Age Security

This policy was mentioned more often than any other, largely because it is one of the most universal measures on the list. Everyone will eventually grow old and get an OAS payment. Many participants noted that, with the disappearance of pensions, more and more Canadians will have to depend on the CPP and OAS; and felt current levels are far too low to provide the average senior who has lived paycheque to paycheque with enough money to live on during retirement. Several participants noted they had aging parents, and that any increase to the OAS would help make their parents more self-sufficient and reduce the burden on them.

Improve access to a family doctor and nurse practitioner

The issue of access to family doctors also came up quite a bit in certain locations. It was a major issue in Vancouver, Longueuil and Charlottetown in particular, so participants in those locations tended to want to see any sort of government action that would remedy the problem. There were many anecdotal accounts in those cities of the impossibility of getting a family doctor, and a feeling this was a top priority the health care system needed to correct. In Calgary and Mississauga, participants did not seem to feel this was as much of an issue locally.

Implement a national pharmacare system

This was one of the top choices across Canada – even in Longueuil and Vancouver, which are in provinces already having provincial pharmacare plans that are quite comprehensive. Many participants had paid out-of-pocket for prescription drugs, or knew people who did, and had found it very expensive. Some mentioned that at the very least there should be drug coverage for people with the most “serious” conditions (e.g. insulin for people with diabetes or drugs for people with cancer) Some also told stories of certain drugs being covered by provincial plans in some provinces and not others. In Longueuil, the appeal of this policy was largely out of concern for Canadians in other provinces who do not have the same coverage they do in Quebec. The consensus was that no one in Canada should be going without medically necessary drugs because they can’t afford them. A couple of participants who were better informed about pharmacare noted that, if there were to be a national plan, this would give Canada more leverage on pharmaceutical companies, which should lead to lower prices for drugs for *everyone*.

Improve access to mental health services

Many participants also chose access to mental health services as a measure they wanted to see implemented. There seemed to be a general consensus that this was one area of the public health care system that was severely lacking; and people spoke of the difficulty of accessing mental health professionals within the system. Many participants who chose this as a priority also saw a link between addressing mental health and making communities safer, since they believed untreated mental health issues often leads to more crime.

It should be noted that these focus groups were conducted during the week Bell Canada was promoting its *Let’s Talk* promotional campaign regarding mental health, so the whole issue may have been more top-of-mind than

usual. Some participants who did NOT want the government spending more on programs to deal with drug addiction felt that more investment in mental health might prevent a lot of people from turning to drugs.

Increase the Canada Student Grants

This was chosen by a few participants who were either students themselves or had children attending college or university, and who therefore had a vested interest. Some also noted it was beneficial to all Canadians to make higher education more accessible. Those who chose this noted approvingly that it was an increase to grants, as opposed to loans.

Increase the CPP and QPP Survivor Benefit

Only a few people chose this policy. Most participants did not have a good understanding of what the survivor benefit even was; and those who were concerned about the welfare of seniors were much more likely to choose an across-the-board increase to the OAS.

Invest in drug addiction care

Apart from a couple of participants who mentioned the need to address the opioid addiction crisis, very few people picked this measure. In fact, participants were most likely to push back against the prospect of government investing more into drug addiction care, with many feeling the money was better spent on mental health services. Some felt this would be an effort by the government to deal with the unintended consequences of the legalization of cannabis. Others, however, argued that these kinds of programs are not just for cannabis addiction but all sorts of addictions; which is why this sort of measure is relevant and important.

Increase the Canada Child Benefit (CCB)

Relatively few people chose increasing the CCB as a top priority. Those who did were participants with young children, who would personally benefit. It should be noted that some people had already identified an increase to the CCB as something the government had recently enacted, so there may have been a feeling that this had already been addressed.

Make parental benefits tax-free

Only a handful of participants chose this policy. Most did not have a good understanding of what was meant by parental benefits in the first place.

D. Transition to a clean economy

Government action on climate change

The vast majority of participants felt the government is not doing enough to address climate change. Some felt the government had talked a lot about climate change, but had not taken any concrete steps. Others were aware of the fact that the federal government had imposed a carbon tax across the country and had taken a few other vague measures – but even people who could identify specific measures noted that, as long as the problem with climate change continues to worsen, nothing the government was doing could ever be considered “enough.” Some participants, particularly in Longueuil and Vancouver, noted the government claimed to be concerned about climate change, but had just spent billions of dollars on a pipeline. They felt this was

contradictory and showed a lack of true commitment to action on climate change. Some noted the government was not meeting its targets, and that those targets had been set by the previous government.

A few participants who were much less interested in the issue of climate change felt the government was doing enough, because they vaguely recalled hearing about some targets being set. Only in Calgary were there a few people who felt the government was doing too much. These participants tended to be against the imposition of the carbon tax, were concerned about the stalling of pipeline construction, and felt that Canada was having to carry an unfair burden in the global fight against climate change, while other countries in the developing world were not pulling their weight.

Many participants expressed the view that, while the government has work to do, each individual also has a role to play (e.g., buy local, more recycling, less plastic packaging, driving less or driving an electric car, etc.). The conversation around climate change often led participants to talk about pollution in general (i.e., recycling, not using plastic bags, clean air, clean water, etc.).

Economic impact of action on climate change

With regard to the economic impact of climate change, several participants noted the impact of a changing climate could be very detrimental to the economy, but that the economic impact of taking measures to address climate change would likely benefit the Canadian economy. While some acknowledged there could be short-term damage to the oil and gas sector, they felt that, in the long run, combatting climate change was an economic plus. It would lead to more innovation, more green energy and more efficient ways of doing things. Some felt Canada had the potential to be a world leader in energy efficiency and cleaner forms of energy. Some pointed out that addressing climate change could have a mixed impact on the economy – while some industries may suffer, others would flourish – and that, in the end, Canada would benefit because our environment, our health and our quality of life would be better.

Even in Calgary, several participants felt that, in the long run, Canada would benefit from addressing climate change and getting “ahead of the curve” on shifting to a low-carbon economy. In general, people were optimistic Canada could turn this into a positive. Some noted that, over time, gasoline, meat and cellphones could get more expensive, but that we would adapt.

Meaning of clean energy and impact on oil and gas

When participants were asked what a transition to clean energy meant to them, they tended to describe increasing the use of renewable and low-carbon forms of energy, such as solar and wind energy, or they spoke of people driving electric cars. They virtually all saw this as something good, with the potential for Canada to make a more positive impact on the world. Many were optimistic that Canada could become a world leader in clean energy. Many also spoke of a transition to cleaner energy at the individual level, with people heating their homes using cleaner sources of energy, driving electric cars, or having access to more public transit and bike paths. Even in Calgary, where the local economy is still very dependent on traditional oil and gas, most participants saw a transition to clean energy as a good thing that could be part of a broader move to a more diversified economy.

With regard to the impact of a shift to clean energy on the oil and gas sector – outside of Calgary, most participants were quite unaware and felt these were “industries of the past,” and there would have to be a shift to a new economy. Some felt that, in 20 years, most cars would be electric and the demand for oil would drop. Others felt there would still be lots of demand for petroleum products for the foreseeable future. In Calgary, several participants noted Canada would always be a resource-based economy and people still like cheap energy.

Measures of climate change success

When participants were asked about what they thought would be an indicator of success in Canada's efforts to address climate change, there was no clear consensus. Many were confused by the question, or conflated climate change with simply having a cleaner environment in general and spoke of the air being cleaner and there being less smog. Some who were better informed about climate change in the first place felt that evidence Canada was meeting its GHG targets in accordance to the Paris Accord would be an indicator. Others said the only real indicator that efforts were bearing fruit would be if the glaciers and polar ice caps stopped melting, there were fewer extreme weather events, and there was evidence the world was turning a corner. Some also felt an indicator of success would be a tangible change in human behaviour, such as less driving, less plastic use and more electric cars being sold.

Support for specific climate change policies

Participants were given a list of 11 possible policies the Government of Canada could introduce that would address climate change, and were asked to pick which three of the 11 they felt would be the most important to them personally. The circulated list included the follow items:

- Make zero-emission vehicles more affordable
- Help Canadians make their homes more energy-efficient and climate-resilient
- More renewable energy and connecting our electrical grid from coast-to-coast
- Work to plant two billion trees over 10 years
- Investing more in transit, including more electric transit and school buses
- Cut tax rates by 50 percent for companies that develop and manufacture zero-emissions technology
- Protecting 25 percent of Canada's land and 25 percent of Canada's oceans by 2025
- High frequency rail between major cities
- Invest in protecting trees from infestations and help rebuild our forests after a wildfire
- Install up to 5,000 additional charging stations for zero-emissions vehicles
- Create a new low-cost national flood insurance program

In general, participants were in favour of virtually all of the items listed, but tended to base their three choices on whether it was something they felt they could personally take advantage of, as well as whether it was a policy they saw as having a direct link to addressing climate change. For that reason, the two most popular policy options tended to be making zero-emission vehicles more affordable and helping Canadians make their homes more energy-efficient. Some of the more typical comments and observations made about each item were as follows:

Make zero-emission vehicles more affordable

Many people like the idea of having an electric car someday and right now they felt the biggest obstacle is the high cost. Participants generally saw action on climate change as synonymous with individuals changing their

lifestyle – and car exhaust is currently seen as a major cause of GHG emissions. A few people noted that, even if everyone drove an electric car, the batteries have to come from somewhere, which could still be environmentally damaging.

Help Canadians make their homes more energy-efficient and climate-resilient

This was also a popular item on the list of policies. People would like to feel they're doing their part personally; and this measure has the added feature of helping people save money by making their homes more energy efficient.

More renewable energy and connecting our electrical grid from coast-to-coast

Quite a few participants chose this item because the idea of more renewable energy had already been identified as being very central to addressing climate change. Some noted this item included two potentially disconnected measures, since having a coast-to-coast electrical grid was not necessarily dependent on having more renewable energy.

Work to plant two billion trees over 10 years

Planting more trees was popular because it not only enhances the environment, but is also seen as improving the air quality, since trees are our "lungs." Some noted it was hard to put the two billion number in context, since no one knows how many trees are already being replanted each year.

Investing more in transit, including more electric transit and school buses

This policy had some appeal, particularly in locations such as Vancouver and Mississauga, where better transit is seen as a major priority.

Cut tax rates by 50 percent for companies that develop and manufacture zero-emissions technology

This measure was more controversial. Some liked the idea of tax breaks for companies that develop this sort of technology. Others were concerned about tax "giveaways" and wondered why companies would not invest in zero-emission technology regardless, if it had the potential to be profitable.

Protecting 25 percent of Canada's land and 25 percent of Canada's oceans by 2025

Some people liked the idea of protecting more land and water, but most found this policy to be far too vague. They wondered what it meant to protect 25 percent of oceans, and what proportions are already protected.

High frequency rail between major cities

There was some interest in this concept in locations such as Calgary and Mississauga, where some had heard past discussion of train service in the Calgary-Edmonton or Quebec City-Windsor corridors. Most did not see this as a high priority.

Invest in protecting trees from infestations and help rebuild our forests after a wildfire

Few people chose this item, as they saw it as dealing with a problem after it had happened, as opposed to preventing climate change. Those who were concerned about forests were much more inclined to choose the planting of two billion trees.

Install up to 5,000 additional charging stations for zero-emission vehicles

Few people chose this option. The feeling was zero-emission vehicles first had to be affordable, and then the private sector would inevitably build charging stations because the demand would be there.

Create a new low-cost national flood insurance program

There was virtually no interest in a flood insurance program. People were not aware of there being a current problem with flood insurance being inaccessible; and on top of that, they felt dealing with flood insurance was not about preventing climate change as much as helping deal with the consequences of climate change.

Other environmental measures

To the extent that participants could list any other environmental measures they would like to see from the federal government, they tended to mention educating and sensitizing Canadians to what is happening and pointing out what they can do to make a difference, developing more solar and wind energy, banning or strictly regulating single use plastics, more regulation of big corporate polluters, and more investment in technology.

E. Health care**Reaction to pharmacare**

Awareness of pharmacare varied from community to community. Awareness was quite high in Vancouver and Charlottetown, and lower in the other locations. Most participants who had heard of pharmacare had at least basic understanding it would mean some sort of universal program giving Canadians free access to prescription drugs. However, those who were less familiar with the concept in the first place were confused and thought it might be an enhancement to existing government and private drug benefit plans, to cover expensive drugs not currently being consistently covered. Some in Calgary wondered if it might be some sort of government agency that would set prices and make generic drugs more available. Most understood there are currently many Canadians who have to pay out-of-pocket for their drugs, and who may or may not be able to afford it. Some also commented on the current confusing “patchwork” of different drug programs and plans in different provinces and with different employers, and how some do or do not cover medically necessary drugs.

For the most part, participants agreed that, in Canada, no one should have to go without medically necessary prescription drugs due to an inability to pay. It was said several times that having some sort of public system to cover drug costs was “the right thing to do.” Many people told anecdotes either about themselves or people they knew who had to personally pay exorbitant prices for insulin or other expensive drugs or devices. Some were concerned a free pharmacare system would lead to abuse and people being over-medicated; they therefore thought that, rather than having the system cover all drugs, it should instead focus on drugs for the most common and serious conditions such as diabetes or cancer. Several participants acknowledged that, while pharmacare would likely cost governments a lot of money initially, it could save money in the end due to people

taking the drugs they need and staying healthier, and due to the government potentially being able to negotiate better bulk pricing from drug companies than is now the case. In general, the goal of making prescription drugs accessible to all Canadians was seen as an example of the kind of thing our tax dollars should be going toward.

In Longueuil, we were asking this question in a province where there is already a quasi-universal provincial drug plan – the Régie de l'assurance maladie du Québec (RAMQ). Participants there acknowledged they have good drug coverage through RAMQ, but they were still supportive of a national pharmacare program so other Canadians could have similar access to medication. Many recognized that there are many Canadians who do not fill their prescriptions because they cannot afford them and felt this ends up costing the health care system more in the end.

Better access to family doctors

As was noted earlier, the salience of the issue of better access to family doctors varied a great deal from location to location. In Vancouver, Longueuil and Charlottetown, participants spoke of there being major local challenges with getting a family doctor. In other locations this was less of a concern. When asked what the federal government could do to help ensure access to family doctors, many people had no specific recommendation, as they saw this as a complex issue. Some mentioned “hiring more doctors,” though it was noted this was largely a provincial issue. Others mentioned allowing nurse practitioners and pharmacists to take on some of the tasks currently monopolized by doctors. Other specific suggestions included: allowing physicians to work as many hours as they wanted; making medical school more affordable and more accessible; doing a better job of recognizing foreign credentials; encouraging more doctors to immigrate to Canada; and reforming the compensation and tax structure so that physicians don't leave to go work in the U.S., where there is a perception their earnings are unlimited and their taxes are lower.

Other health priorities

When participants were asked about other health care-related priorities for the federal government, there was again some confusion as to what exactly the federal role would be in the delivery of health care. That being said, people had a variety of suggestions, including more mental health programs, more medical equipment (i.e., MRIs, etc.), more staff for hospitals – it was noted that there are lots of hospitals, just not enough staff to make full use of them – and more health promotion and prevention. It was noted that, ideally, the government should be helping people to stay healthy so they would not need to use primary care as much; and that there should be more medical schools and doctors, measures to reduce waiting lists for medical procedures, and more long-term care facilities.

F. Community safety

Perception of “safe communities”

When the concept of “safer communities” was introduced, most participants felt it could refer to safety in a number of ways. It could mean safety from crime, but also safety from natural disaster, dangerous traffic and environmental pollution; having a visible police presence; having fire and emergency services available; and being able to walk around without fear. Some also described a safer community as one in which there was community togetherness and support (i.e., volunteers, everyone working together to make sure their community is strong).

Participants in all locations generally felt they lived in a safe community already, and it was clear this was really not a major top-of-mind concern. In Charlottetown, people noted it was already so safe they never lock their doors. In other locations, there was some mention of problems stemming from mental health and drug addiction problems, which led to more petty crime. In Vancouver, it was noted the most common form of crime is having belongings stolen from a car. There was also a tendency for participants to displace the issue of safety to other areas of the metropolitan areas where they lived. In Mississauga and Longueuil, some described crime and safety as more of an issue in Toronto and Montreal, respectively. In Vancouver, people felt it was quite safe where they lived, but they were aware of problems with gangs in Surrey.

Government action on safer communities

When participants were asked about what sorts of measures they would like to see the federal government undertake to make communities safer, there was often initial confusion as to what measures would be under federal jurisdiction, as opposed to those that would involve local police forces. To the extent that people did want to see action from the federal government, they mentioned having more police presence on the streets, tougher laws to make sure that criminals are not set free, more investment in mental health and drug addiction, more CCTV cameras and better street lighting. Some made more general comments about reducing poverty, homelessness and drug addiction, which are seen as factors contributing to crime. Only a couple of participants made any spontaneous mention of gun control in this context. All that being said, it should be stressed safety was not a big top-of-mind issue for most participants, and they did not see this as a major priority for the federal government.

When prompted, participants did support actions that would ban military-style assault weapons and help cities deal with street gangs, although these were not seen as major concerns in their own communities. With regard to military-style assault rifles, most participants were surprised to know these were not already illegal in Canada. The overwhelming consensus was that these sorts of weapons should be banned, and many people went further to say all handguns should be banned as well. However, it was clear that, for most people, the desire to see military-style assault rifles banned came from a values-based distaste for guns in general and for “American-style gun culture” – and not because people saw this as a way to make them feel personally safer or make their own communities safer. There was a perception Canada already has strict gun control, and this is something many participants took pride in, as a policy differentiating Canada from the United States.

When prompted, there was universal support for measures such as trying to stop the flow of weapons across the border and helping cities deal with gang-related violence – even if the gang issue was seldom identified as a concern in these communities.

II. Detailed findings – quantitative phase

A. Assessment of the economy

Current state of the Canadian economy

Just over four in ten have a positive perception of the current state of the economy; close to two in ten are negative and this has increased in the past year

Several questions were asked related to current economic well-being. Respondents were asked to use a scale from 1 (terrible) to 10 (excellent) to rate each factor.

When rating the current state of the Canadian economy, just under five in ten say it is good (score of 7 to 10), three in 10 are neutral (score of 5 or 6), and close to two in in ten say it is bad (score of 1 to 4). Perceptions of the economy in January 2020 are comparable to February 2019, with both positive and negative outlooks remaining on par. This is very consistent with the qualitative research, which also showed most people were quite satisfied with the current state of the Canadian economy.

Current state of economy

Date	Positive perception (7-10)	Neutral (5-6)	Negative perception (1-4)
Jan-20	45%	32%	19%
Feb-19	43%	37%	18%
Jan-18	48%	38%	13%
Sep-17	48%	36%	15%
Oct-16	37%	41%	20%
Feb-16	23%	46%	31%
Feb-15	40%	43%	17%
Jan-14	46%	41%	12%
Jan-13	52%	38%	10%
Feb-12	47%	40%	12%
Feb-11	47%	41%	11%
Feb-10	34%	48%	17%
Nov-09	36%	47%	17%

Q2a Using a scale from 1 to 10, where 1 is terrible and 10 is excellent, how would you rate the following: The current state of the Canadian economy

Responses are generally similar across most subgroups of the population, with some exceptions. Positive sentiment about the national economy (scoring 7-10) is higher in Quebec (58%) and B.C. (51%), and lowest in Alberta (21%) and Saskatchewan (30%), although the latter has increased somewhat since 2019. In this wave, men are more likely to be positive than women, but perceptions do not vary by notably age. Being positive continues to be linked to higher levels of household income and education, households that speak languages other than English, and among those who say, later in the survey, that their own personal financial situation is good.

Provincial economies

B.C. and Quebec residents continue to be the most positive about their province’s economies; Albertans remain the most negative.

Canadians’ perceptions that their provincial economy is doing well have generally improved since February 2019, with some exceptions. In this wave, over half of Quebec residents believe their economy is doing well (55% scoring it as a 7 or higher), followed closely by B.C. residents (53%). By contrast, those in Alberta (9%, similar to 12% in 2019) and Atlantic Canada (20%, basically unchanged) are the least positive about the current state of their provincial economies. Manitobans are marginally less likely than in 2019 to give their provincial economy a positive rating, while opinion in Ontario is unchanged.

Provincial economies comparison

% positive rating (7-10)							
Date	B.C.	AB	SK	MB	ON	QC	ATL
Jan-20	53%	9%	29%	28%	35%	55%	20%
Feb-19	46%	12%	24%	34%	36%	48%	21%
Jan-18	55%	25%	34%	38%	39%	41%	17%
Sep-17	47%	18%	35%		36%	40%	20%
Oct-16	53%	12%	39%	28%	31%	31%	16%
Feb-16	46%	10%	42%	47%	26%	18%	9%
June-15	48%	38%	72%	31%	33%	23%	17%
Feb-15	49%	36%	63%	29%	33%	18%	19%
Jan-14	40%	79%	85%	43%	33%	24%	25%
Oct-13	50%	79%	78%	44%	36%	26%	29%
Aug-13	43%	79%	85%	39%	34%	30%	22%
May-13	37%	76%	77%	40%	32%	33%	21%

Q2b Using a scale from 1 to 10, where 1 is terrible and 10 is excellent, how would you rate the following: the current state of the [PROVINCE] economy?

Feeling the provincial economy is performing well is somewhat higher among those with post-secondary education, and men. Positive perceptions are also somewhat higher among those who identify as being in a good financial situation personally, and those who think the Canadian economy as a whole is doing well.

Price of gasoline

Somewhat fewer Canadians than last year rate the current price of gasoline as good, but positive perceptions remain higher than observed in 2018 and previously.

Four in ten Canadians rate the current price of gasoline negatively (score of 1 to 4 on a 10-point scale), three in ten remain neutral (5 or 6), and just over two in ten rate it positively (7 to 10). Positive ratings have softened since last year (22% vs 29%) but remain higher than observed in January 2018.

Current price of gasoline

Date	Positive rating (7-10)	Neutral (5-6)	Negative rating (1-4)	Not sure
Jan-20	22%	31%	39%	8%
Feb-19	29%	29%	36%	6%
Jan-18	15%	26%	54%	4%
Sep-17	18%	25%	54%	1%

Q2dc Using a scale from 1 to 10, where 1 is terrible and 10 is excellent, how would you rate the following: the current price of gasoline

In this wave, positive ratings of the price of gasoline are somewhat higher among Albertans (33%) and Manitobans (31%) than elsewhere (13% to 24%), and among university graduates (27%), those who feel the Canadian economy is good (37%), and those who report their personal financial situation as good (34%).

B. Personal financial situation

Rating of personal financial situation

The proportion of Canadians stating their personal financial situation is good remains stable.

Canadians rate their personal financial situations similarly to previous years, with just over half giving a positive rating (score of 7-10), one in four giving a neutral rating (5 or 6), and just under two in ten saying their situation is bad (1 to 4).

Personal financial situation rating

Date	Positive rating (7-10)	Neutral (5-6)	Negative rating (1-4)	Not sure
Jan-20	54%	25%	18%	3%
Feb-19	53%	27%	17%	3%
Jan-18	53%	27%	17%	3%
Sep-17	51%	30%	16%	3%
Oct-16	51%	30%	18%	1%
Feb-16	53%	29%	18%	-

Q2c Using a scale from 1 to 10, where 1 is terrible and 10 is excellent, how would you rate the following: the current state of your own personal financial situation?

In this wave, those most likely to report a positive personal financial status reside in Quebec (59%), Ontario (58%) and Manitoba (57%), and the least likely are in Alberta (42%) and Saskatchewan (39%). Reporting a good personal financial situation is slightly higher among men (57%) than women (51%). Self-reported personal financial situation is skewed by age, with those aged 18-34 years (48%) being less positive than those aged 35 years and over (56%). Like last year, positive ratings increase as household income increases, from a low of 34 percent among those with household incomes under \$40,000 to a high of 80 percent among households with incomes of \$150,000 or more. Being positive about personal finances is linked to full-time employment (59%) or to being retired (56%), to higher levels of education (63% with a university degree), to thinking the Canadian economy is good (74%), and to being a home owner (61%, vs. 41% of renters).

Affordability/cost of living

Among those with applicable expenses, close to three in ten say prescription drugs are very affordable, likely due to drug coverage plans; only around one in ten say groceries, child-related expenses and home Internet are very affordable.

Canadians were asked to rate the affordability of several common expenses, using a scale from 1 (not at all affordable) to 10 (completely affordable). Interviewers also recorded “Don’t know” and “Not applicable” responses, to account for those who were not able to provide a personal assessment on the affordability of an item. Because fairly high proportions indicated they did not have prescription drug (14%) or child-related expenses (50%), the table below is based on those for whom each expense was applicable.

Just under three in ten find prescription drugs to be very affordable (rate as 9 or 10), and almost six in ten (56%) rate this as a least moderately affordable (that is, a score from 7 to 10), likely reflecting there being a fairly high proportion of Canadians with prescription drug coverage of some kind. In contrast, around half of that proportion (13%) rate weekly groceries as being very affordable (41% at least moderately), and a similar proportion indicate this about monthly internet costs (12% very, 34% at least moderately). Similarly, one in ten of those raising children rate these costs as being very affordable (37% at least moderately).

Rating of affordability of Items – based on those for whom the expense is applicable

Affordability items	Very affordable (9-10)	Affordable (7-8)	Neutral (5-6)	Not very affordable (3-4)	Not at all affordable (1-2)
Prescription drugs (n=1,742)	28%	28%	22%	12%	9%
Weekly household groceries (n=1,977)	13%	28%	33%	18%	7%
Monthly Internet service (n=1,823)	12%	22%	28%	23%	16%
Raising children (n=909)	11%	27%	30%	20%	12%

Q2a Using a scale from 1 to 10, where 1 is not at all affordable and 10 is completely affordable, how affordable are the following to you personally, if applicable

The affordability of each of these items is generally viewed to be similar across Canada and across population subgroups. One exception is prescription drugs, which are most reported as very affordable in Ontario (35%), B.C. (32%), and the Atlantic provinces (32%), and by fewer in Quebec (18%) and Alberta (22%). Reporting any of these as being very affordable is predictably somewhat higher among those in higher income households, those with higher levels of education, and those who are positive about their personal finances or Canada’s economy.

C. Government budget priorities

Of seven priorities, Canadians are most likely to think ensuring the wealthiest pay their fair share deserves government attention when it comes to budget decisions, followed by making communities safer, jobs and climate change.

Canadians were asked to indicate, using a 10-point scale, how important it is for the Government of Canada to keep each of seven issues in mind when it comes to making budget decisions. While all are considered at least somewhat important by strong majorities of seven in ten or more, the most likely to be rated as very important (score of 9 or 10) is ensuring wealthy Canadians pay their fair share (58%). Around half each also give this rating to making communities safer, helping Canadians get a good job, and fighting climate change. Just under half prioritize supporting middle-class (either to make life more affordable or to improve quality of life), and just over four in ten give this rating for implementing pharmacare.

Issues	Very important (9-10)	Some-what important (7-8)	Neutral (5-6)	Not very important (3-4)	Not at all important (1-2)	DK
Ensuring the wealthiest Canadians pay their fair share (n=1,004)	58%	21%	11%	3%	4%	2%
Making communities safer	49%	30%	13%	3%	2%	2%
Helping Canadians get a good job	48%	33%	11%	3%	3%	2%
Fighting climate change	48%	24%	12%	5%	9%	1%
Supporting middle class families to make life more affordable (n=997)	45%	33%	14%	4%	3%	1%
Supporting middle class families to improve their quality of life (n=1,003)	45%	33%	14%	4%	2%	2%
Implementing a national program for prescription drug coverage (pharmacare) (n=996)	42%	32%	14%	5%	5%	2%

Q2b How important is it for the Government of Canada to keep the following issues in mind when making Budget decisions? Please rank each on a 1 to 10 scale, where 1 means it is not at all important and 10 means it is very important.

In general, the groups more likely to rate most of these budget considerations as being very important (score 9 or 10) are those most likely to potentially benefit from them (with some notable exceptions): younger Canadians age 18 to 34, women, renters, those with lower levels of household income or education, Allophones, and those reporting poor a personal financial situation or self-identifying as being low/working class. The exception is fighting climate change, for which more affluent Canadians are among the most enthusiastic.

The groups most likely to rate each as 9 or 10 are outlined below:

- *Ensuring the wealthiest Canadians pay their fair share:* B.C. residents; women; age 55 and over and, linked to older age, landline users and retirees; those reporting a good personal financial situation; those self-identifying as low/working class. Note Albertans are the least likely to score 9 or 10 on this measure (43%).

- *Making communities safer:* Ontario residents; women; 18-34, household income under \$40,000; high school or less education; Allophones (language at home other than English or French); renters.
- *Helping Canadians get a good job:* Atlantic Canadians; women; 18-34; household income under \$40,000; not in workforce; high school or less education; Allophones; renters; bad personal financial situation; consider the Canadian economy to be bad; low/working class.
- *Fighting climate change:* Similar across much of the country, but highest in Quebec, the Atlantic and B.C. and lowest in Alberta; highest among women, 18-34; those working part-time or not in the workforce; university degree; Francophones; renters; good personal financial situation; increases as opinion about state of the economy improves (bad 25%, fair 46%, good 67%).
- *Supporting middle class families to make life more affordable:* Atlantic Canadians; women; age 18-34; household incomes under \$80,000; those working part-time or not in the workforce; Allophones; renters; those reporting their personal financial situation is terrible; low/working class.
- *Supporting middle class families to improve their quality of life:* Saskatchewan residents; women; age 18-34; household income under \$40,000; those working part time; renters; bad personal financial situation; consider the Canadian economy to be bad; low/working class.
- *Implementing a national program for prescription drug coverage (pharmacare):* Highest in the Atlantic (58%) and lowest in Alberta (26%); higher among women; age 55+ /retired; household income under \$40,000; renters; consider the Canadian economy to be good; little notable difference by perceived class or personal financial situation.

D. Level of well-being

Educational opportunities and health are the areas in which majorities of Canadians feel their generation is better off than their parents’ generation at the same age; four in ten think their financial security is worse.

Canadians were asked to indicate, for five measures, if their generation is better off, worse off or the same as their parents’ generation was at the same age. About seven in ten say their generation is better off in terms of educational opportunities, close to six in ten say this about health, and just under half feel their quality of life is better. They are divided about whether their employment opportunities are better (36%) or worse (38%) than those of their parents at the same age and are more likely to think they are worse off (42%) than better off (33%) in terms of financial security.

Compared to parents’ generation in terms of:	Better off	About the same	Worse off	Depends/DK
Educational opportunities	68%	15%	14%	3%
Health	58%	22%	18%	2%
Quality of life	46%	26%	26%	2%
Employment opportunities	36%	20%	38%	5%
Financial security	33%	22%	42%	2%

Q3 *Thinking about your parents’ generation when they were the same age you are now, would you say your generation is now better off, worse off, or about the same in terms of...?*

Opinions are generally quite similar across the country and many subgroups, with some exceptions. In all cases, feeling one's own generation is better off than one's parents' is highest in Quebec and among Francophones; it also tends to be higher among those age 55 and over and retired persons than younger Canadians, if only slightly. Saying each is better now than it was for their parents at the same age is also highest among those who rate their personal financial situation or the state of the national economy as good, and all increase as self-reported financial class increases. There is little difference by household income, except those with \$100,000 or more are the most likely to say their health is better (65%). Better educational opportunities and quality of life are noted most by those who have a university degree.

E. Tax system

Strong majorities think low income earners should be paying less tax, and top earners and big corporations paying more

Canadians were asked if, in their opinion, five groups are currently paying the proper amount in taxes, or if they should be paying more or less. Seven in ten think low-income earners should be paying less tax, and just over half think this about small businesses. In the case of middle-income earners Canadians are more divided; just under half think this group should be paying less tax, while a statistically comparable proportion thinks they are currently paying the proper amount. In contrast, strong majorities think big corporations (75%) and the top one percent of income earners (71%) should be paying more in tax.

Tax groups	Should be paying less	Currently paying proper amount	Should be paying more	DK
Lower-income earners	69%	24%	3%	4%
Small businesses	52%	37%	4%	7%
Middle-income earners	48%	45%	4%	3%
The top one percent of income earners	6%	18%	71%	5%
Big corporations	3%	15%	75%	6%

Q4 In your opinion, are each of the following groups currently paying the proper amount of taxes, or should they be paying more tax, or less tax, than they are now?

That *big corporations* and the *top one percent of income earners* should be paying more in tax is the dominant view across the country and all subgroups. In both cases, this view is expressed most by Atlantic Canadians, middle-income earners and those who think the Canadian economy is fair or good.

Feeling *lower-income earners* should pay less in tax is also a dominant view nationally, although higher in the Atlantic (76%), and among women (75% vs. 64% of men), those age 55 and over (74%) and retirees (74%), and those with the lowest household incomes (73% under \$80,000), decreasing as income increases (to 63% with \$150,000 or more).

That *small businesses* should be paying less tax is generally similar across subgroups, but highest in the Atlantic region (62%) and among those who think their personal financial situation is bad (58%) or that the Canadian economy is bad (61%). As with lower income earners, thinking small businesses deserve tax relief decreases as household income increases.

Believing *middle-income earners* should pay less in tax ranges from a low of 39 percent in Saskatchewan to a high of 53% in Quebec; it is generally similar by other demographic subgroups and is also linked to thinking either one’s personal financial situation or the economy in general is bad.

F. Affordable housing and helping first-time homeowners

To lessen respondent burden and keep the survey to a manageable length, each person was randomly asked one of two multi-part questions about affordable housing.

Housing affordability

Strong majorities of Canadians continue to agree it is very difficult for people to buy a house today, and that the government should address affordable housing.

Approximately half of the respondents were read a series of statements about housing affordability and asked to indicate their level of agreement with each. Housing continues to be an issue about which Canadians feel strongly. Results are quite comparable to when this question was asked in 2019. Seven in ten Canadians agree it is very difficult for people to buy a house in the current economic climate, and two-thirds agree the federal government has a responsibility to address the lack of affordable housing in the country. Just under six in ten homeowners agree strongly the cost of living in their home is affordable on their current household income. There is minority strong agreement (32%, generally similar to 36% in 2019) that it would be easy to find somewhere to live that is both affordable and in a safe neighbourhood, if someone was buying a house today.

Eight in ten (80%) homeowners (n=716) agree it was extremely important they own a home, rather than rent. Renters (n=258) were asked two specific questions: just over six in ten agree it is very important they be able to own a home sometime in the future, and just under half agree the rent they pay is affordable on their current household income.

Agreement with statements about housing affordability

<i>Statements</i>	<i>* Homeowners / ** Renters</i>	Agree (7-10)	Neutral (5-6)	Disagree (1-4)	Not sure	Agree 2019
It was extremely important that you own a home, rather than rent (n=716)*		80%	12%	7%	1%	76%
It is very difficult for people to buy a house today, in the current economic climate (n=999)		70%	16%	12%	2%	71%
The federal government has a responsibility to address the lack of affordable housing in Canada (n=999)		68%	17%	12%	2%	65%
Costs of living in your home are affordable on current household income (n=716)*		56%	24%	19%	1%	63%
It is extremely important you be able to own a home in the future (n=258)**		63%	13%	23%	2%	60%
Rent you pay is affordable on your current household income (n=258)**		48%	23%	28%	1%	53%
If needed to buy a home today, would be easy to find somewhere to live both affordable /safe neighbourhood (n=999)		32%	19%	47%	2%	36%

Q7a. SPLIT SAMPLE (1/2 7A –1/2 7B): Using a scale from 1 to 10, where 1 is strongly disagree and 10 is strongly agree, to what extent do you agree or disagree with the following statements?

The subgroups noted are the most likely to agree with the statements below:

- *It is very difficult for people to buy a house today, in the current economic climate:* B.C., Manitoba and Ontario residents, women, age 18-34, household income \$100-<\$150,000, Anglophones, renters.
- *The federal government has a responsibility to address the lack of affordable housing in Canada:* B.C Ontario and Saskatchewan residents, women, age 18-34, renters, low/working class or middle class.
- *Costs of living in your home are affordable on current household income:* Manitoba residents, household income \$150,000 or more, university degree, personal financial situation is good, Canadian economy is good.
- *If you needed to buy a home today, it would be easy to find somewhere to live that is both affordable and in a safe neighbourhood:* Quebec and Atlantic residents, men, household income \$150,000 or more, personal financial situation is good, Canadian economy is good, above middle class.

These findings are very consistent with what was heard in the qualitative research phase, where concerns about affordable housing were amplified in Mississauga, Vancouver and Charlottetown.

Federal government housing priorities

Half of Canadians place a high priority on increasing the availability of affordable housing and on requiring developers to ensure a portion of new housing is affordable.

Approximately half of respondents were read a series of five housing-related issues and asked to indicate the extent to which each should be a priority area for the federal government. At least three-quarters place at least moderate priority on each. The top priorities identified by Canadians is increasing the availability of affordable housing and requiring developers to ensure 20 percent of new housing is affordable, each rated 9 or 10 by half. Just under this proportion would have the government prioritize making monthly mortgage payments more affordable for middle- and lower-income families. Around four in ten each give high scores to continuing incentives for first-time home buyers and continued investment in community housing.

Housing priorities for the federal government

Statement	High priority (9-10)	Moderate priority (7-8)	Neutral (5-6)	Not really a priority (3-4)	Not at all a priority (1-2)	Not sure
Increasing the availability of affordable housing (n=1,001)	51%	31%	11%	4%	2%	1%
Requiring developers to ensure that at least 20 percent of new housing is affordable for lower income families (n=1,001)	49%	29%	13%	4%	4%	2%
Making monthly mortgage payments more affordable for middle- and lower-income Canadians (n=1,001)	46%	28%	16%	6%	3%	2%
Continued incentives for first-time home buyers (n=1,001)	43%	33%	15%	4%	3%	3%
Continued investment in community housing (n=1,001)	41%	35%	14%	4%	2%	3%

Q7B. SPLIT SAMPLE (1/2 7A –1/2 7B): To address the issue of housing affordability, what extent do you think each of the following should be a priority area for the federal government? Please use a scale from 1 to 10, where 1 is not at all a priority and 10 is an extremely high priority.

The subgroups noted are the most likely to say the issues below are priorities:

- *Increasing the availability of affordable housing:* Saskatchewan, Ontario, women, household income <\$40K, high school or less education, renters, personal financial situation bad, low/working class
- *Requiring developers to ensure that at least 20 percent of new housing is affordable for lower income families:* women, age 18-34, household income \$40K, part-time workers, high school or less education, renters
- *Making monthly mortgage payments more affordable for middle- and lower-income Canadians:* Atlantic Canadians, women, age 18 to 34, household income under \$40,000, part-time workers, high school or less education, Allophones, low/working class
- *Continued incentives for first-time home buyers:* Quebec, low/working class
- *Continued investment in community housing:* B.C., women, household income under \$40,000, Canadian economy is good.

G. Keeping Canadians safe and healthy

Effectiveness of approaches to addressing gun-related violence

The majority of Canadians agree banning military-style assault rifles would be effective to address gun-related violence, but this view is not consistently held across all provinces.

The safety measure specifically assessed in the quantitative phase of this research related to addressing gun violence. Canadians were read a series of four statements on addressing gun-related violence and asked to rate how effective each approach would be, using a ten-point scale. Of the approaches rated, nearly six in ten Canadians feel a ban of military-style assault rifles would be a very effective approach to address gun-related violence (score 9 to 10). Approximately four in ten believe city funding to fight gang-related violence would be very effective. Similar proportions of just under four in ten each agree that increased funding for law enforcement related to gun violence or buying back privately-owned rifles would also be very effective.

Effectiveness of approaches to addressing gun-related violence

Approach	Very effective (9-10)	Somewhat effective (7-8)	Neutral (5-6)	Not very effective (3-4)	Not at all effective (1-2)	Not sure
Banning military-style assault rifles	58%	11%	10%	5%	14%	4%
Providing funding to cities to fight gang-related violence	42%	32%	14%	4%	5%	2%
Increasing funding for law enforcement related to gun violence	38%	30%	19%	5%	6%	3%
Buying back privately owned assault rifles to get them off the streets	36%	18%	15%	9%	18%	4%

Q8. *How effective do you think the following approaches would be at addressing gun-related violence? Please use a scale of 1 to 10, where 1 means not at all effective and 10 means extremely effective.*

Perceived effectiveness of both funding approaches (for cities and for law enforcement) is consistent across all provinces in Canada. In contrast, thinking either approach involving assault rifles would be very effective lags in the Prairie provinces. Specifically, belief that banning military-style assault rifles would be very effective is lowest in Saskatchewan (38%) and Alberta (40%) and highest in Quebec (65%), Ontario (61%), and the Atlantic region (62%). Feeling it would be very effective to buy back privately-owned assault rifles is lowest in Saskatchewan (24%), Alberta (29%), and Manitoba (29%), and highest in Quebec (41%) and Ontario (38%).

In general, women are more likely than men to indicate each of these approaches will be very effective. Considering each approach to be very effective also generally increases along with age. In addition, the effectiveness of each approach is rated fairly consistently by all income brackets, with one exception: households with lower incomes express the most belief in the effectiveness of increased funding for law enforcement related to gun violence.

H. Transition to a clean economy

Rating of current level of federal government climate change action

When it comes to current government action to fight climate change, Canadians are more inclined to give an unfavorable rating than a favorable one.

Canadians were asked to rate the current level of action taken by the Government of Canada to fight climate change, using a 10-point scale. Because the proportions saying “very good” are relatively low and generally consistent across subgroups, this analysis discusses the proportions indicating the government is doing at least a good job.

Just over one-quarter give a rating of at least good (7-10); one-third give an unfavorable rating (1-4) and one-third are neutral (score 5-6). They are twice as likely to say performance on this file is very bad (16%) than very good (7%). Two percent make comments indicating they are climate change skeptics, and four percent do not provide a rating.

Rating of current level of Government of Canada action to fight climate change

Rating	% giving rating)
Net: good job (rating 7-10)	27%
Very good/excellent (rating 9-10)	7%
Good (rating 7-8)	20%
Neutral (rating 5-6)	35%
Net: bad job (rating 1-4)	32%
Bad (rating 3-4)	16%
Very bad/terrible (rating 1-2)	16%
Don't believe climate change is real/happening	2%
Not sure	4%

Q9 How would you rate the current level of action taken by the Government of Canada to fight climate change? Please use a scale from 1 to 10, where 1 is terrible and 10 is excellent.

That the government is doing at least a *good job* is a minority view across the country and all subgroups, but somewhat higher in Manitoba (36%) and among Allophones (49%) and those who are positive about either their own personal financial situation (31%) or the Canada economy in general (43%).

Feeling that the government is *doing a bad/very bad job* is also a minority view, but somewhat higher, among residents of Saskatchewan (46%), men (36%, vs. 29% of women), and those who regard their own personal financial situation (44%) or Canada’s economy (50%) as bad.

Effectiveness of approaches to reducing pollution and protecting the environment

While each of five environmental measures are considered at least somewhat effective at fighting pollution, Canadians are slightly most likely to think planting two billion trees will be very effective.

Canadians were read a series of five approaches to dealing with pollution and protecting the environment and asked to rate how effective each would be, using a 10-point scale. Strong majorities of at least seven in ten think each would be at least moderately effective (score 7 to 10). The approach rated as most effective (score 9 or 10) is planting two billion trees (46%). Around four in ten each think other rated measures would be very effective.

Effectiveness of approaches to pollution and protecting the environment

Approach	Very effective (9-10)	Somewhat effective (7-8)	Neutral (5-6)	Not very effective (3-4)	Not at all effective (1-2)	Not sure
Planting two billion trees	46%	28%	15%	4%	5%	2%
Making zero-emissions vehicles more affordable	42%	30%	14%	4%	7%	2%
Providing incentives or tax cuts to businesses to develop new clean technology	40%	36%	14%	4%	4%	2%
Increasing the amount of protected land and inland waters	40%	33%	15%	5%	5%	4%
Helping Canadians make their homes more energy efficient and climate resilient	38%	37%	15%	4%	4%	1%

Q10. How effective do you think the following approaches would be in reducing pollution and protecting the environment? Please use a scale of 1 to 10, where 1 means not at all effective and 10 means extremely effective.

Opinions are quite consistent across the country and most subgroups, with some exceptions. In general, most of these approaches are more likely to be considered very effective by people who may be in lower socio-economic strata: those with household incomes under \$40,000, high school or less education, women, renters, and those who identify as low/working class. They also appeal more to those who think the current Canadian economy is good. Alberta residents are the least likely to think clean vehicle affordability and increasing the amount of protected land and inland waters will be very effective; those in Saskatchewan the most likely to give higher ratings to assistance with home efficiency and having more land and water protected.

I. Reconciliation

Effectiveness of approaches to achieving reconciliation

Canadians most strongly believe reconciliation is best achieved through working with Indigenous groups to improve access to healthcare services, and by implementing the recommendations of the National Inquiry into the Missing and Murdered Indigenous Women and Girls.

Canadians were read six statements on achieving reconciliation between Indigenous and non-Indigenous people, and asked how effective each would be, using a ten-point scale. In general, Canadians are more likely to think forward-focused approaches are very effective than those seen as addressing past wrongs. Nearly half indicate (by a score of 9 or 10) that reconciliation would be very effectively achieved by working with Indigenous groups to improve healthcare service access. This is followed by implementing the recommendations of the *National Inquiry into the Missing and Murdered Indigenous Women and Girls* (44%), promoting economic development and self-reliance for Indigenous peoples (40%), and living up to the spirit and intent of treaties and agreements with Indigenous peoples (36%). The approaches least likely to be seen as very effective are compensating Indigenous people harmed under the child welfare system (29%) and issuing official apologies for past policies negatively affecting Indigenous communities (25%).

Effectiveness of approaches to achieving reconciliation

Approach	Very effective (9-10)	Somewhat effective (7-8)	Neutral (5-6)	Not very effective (3-4)	Not at all effective (1-2)	Not sure
Working with Indigenous groups to improve their access to physical and mental health care services	47%	28%	13%	4%	5%	4%
Continue to implement the recommendations of the <i>National Inquiry into Murdered and Missing Indigenous Women and Girls</i>	44%	26%	13%	4%	7%	6%
Promoting economic development and self-reliance for Indigenous peoples	40%	31%	15%	4%	6%	5%
Living up to the spirit and intent of treaties and agreements with Indigenous peoples	36%	28%	18%	5%	7%	6%
Compensating Indigenous people harmed under the child welfare system	29%	29%	18%	8%	10%	6%
Issuing official apologies for past policies that have negatively affected Indigenous communities	25%	20%	21%	11%	17%	5%

Q11. How effective do you think the following Government of Canada initiatives would be at achieving reconciliation between Indigenous and non-Indigenous Canadians? Please use a scale of 1 to 10, where 1 means not at all effective and 10 means extremely effective.

Opinion regarding each of the approaches remains fairly consistent across subgroups, with a few exceptions. Notably, feeling each would be very effective is consistently lowest in Alberta. Meanwhile, women are more likely than men to identify each approach as very effective, and feeling each approach is very effective is also higher among younger Canadians (namely 18-34-year olds). Finally, trust in the effectiveness of issuing official apologies and compensating indigenous people harmed under the child welfare system is higher among those in households with incomes under \$40,000.

Appendix A: Qualitative methodology

Environics Research conducted a series of 10 focus groups with members of the general population between January 27 and February 3, 2020.

Group composition

Two sessions each were conducted in Mississauga, Charlottetown, Calgary, Vancouver, and Montreal (Longueuil). Eight sessions were conducted in English and two were conducted in French. The sessions were distributed as follows:

Date and time	Group Location
January 27, 5:30 p.m. EST	Mississauga, Ontario
January 27, 7:30 p.m. EST	Mississauga, Ontario
January 28, 5:30 p.m. AST	Charlottetown, PEI
January 28, 7:30 p.m. AST	Charlottetown, PEI
January 30, 6:00 p.m. MST	Calgary, Alberta
January 30, 8:00 p.m. MST	Calgary, Alberta
February 1, 12:00 a.m. PST	Vancouver, B.C.
February 1, 2:00 p.m. PST	Vancouver, B.C.
February 3, 5:30 p.m. EST	Montreal (Longueuil), Quebec
February 3, 7:30 p.m. EST	Montreal (Longueuil), Quebec

The in-person groups lasted approximately 120 minutes and consisted of between eight and 10 participants (out of 10 people recruited for each group).

Recruitment

Environics developed the recruitment screener and provided it to Finance Canada for review prior to finalizing. Participants were called randomly by phone and screened to ensure they were invited to the appropriate session. Participants were also screened to ensure the groups included a mix of gender, education, age, and that they would be comfortable voicing their opinions in front of others. Normal focus group exclusions were in place (marketing research, media, and employment in the federal government, and recent related focus group attendance). Participants were offered a \$100 honorarium to encourage participation and thank them for their time commitment.

All groups were video- and audio-recorded for use in subsequent analysis by the research team – during the recruitment process and at the session sign-in, participants provided consent to such recording and were given privacy and confidentiality assurances.

Moderation

Two senior researchers were used to moderate all sessions, as follows:

- Rick Nadeau, Senior Associate, moderated both sessions in Montreal.
- Derek Leebosh, Vice President, Environics, moderated all remaining sessions.

All qualitative research work was conducted in accordance with professional standards and applicable government legislation (e.g. PIPEDA).

Statement of limitations

Qualitative research provides insight into the range of opinions held within a population, rather than the weights of the opinions held, as would be measured in a quantitative study. The results of this type of research should be viewed as indicative rather than projectable.

Appendix B: Quantitative methodology

Background and research objectives

Finance Canada identified a need for qualitative and quantitative research to explore in more detail Canadians' overall concerns and perceptions about the current state of the Canadian economy, emerging issues and their expectations about the role of the Government of Canada in the economy and in seven other issues related to quality of life in Canada.

Use of research: By gauging and analysing the opinions of Canadians, the Government of Canada gains insights into important policy areas related to the mandate of the department and related services. The information gained through this public opinion research will be shared throughout Finance Canada to assist it when establishing priorities, developing policies, and planning programs and services.

Methodology

EnviroNics conducted a telephone survey with 2,000 adult residents of Canada, from January 17 to February 8, 2020. The survey utilized a random probability, using industry-standards random-digit-dialling (RDD) techniques. A survey of this size will yield results which can be considered accurate to within +/- 2.2 percentage points, 19 times out of 20. Margins of error vary based on a variety of factors: they are larger for subgroups of the population and for questions where 50 percent of respondents answered one way and 50 percent answered another way. The margin of error typically decreases as the percent for a particular response approaches 0% or 100%. Respondents were informed about privacy and anonymity.

Sample design and weighting

The survey targeted adult Canadians (18 years of age or older) and used an industry-standard "most recent birthday" selection technique to identify a respondent. Cell phone sample was also included, and cell phone-only households identified.

The sample was stratified by region to allow for meaningful coverage of lower population areas:

Region (% of population)	Sample Size	Margin of error*
Atlantic Canada (7%)	198	+/- 6.9
Quebec (23%)	497	+/- 4.4
Ontario (38%)	601	+/- 4.0
Prairies/NWT/Nunavut (19%)	399	+/- 4.9
B.C./Yukon (13%)	305	+/- 5.6
CANADA (100%)	2,000	+/-2.2

* In percentage points, at the 95% confidence level

The survey data were weighted to the national adult population (region, age and gender).

Questionnaire design

The questionnaire was designed by Environics and Finance Canada representatives and incorporated tracking questions from previous economic surveys. The English version of the final study questionnaire is included in Appendix E. The questionnaire averaged 12.4 minutes to deliver.

Pre-test

A pre-test of 20 interviews (10 in English on January 18, 10 in French on January 21) was conducted and audited via recordings by Environics and Finance Canada staff. These interviews included standard GC pre-test probing questions. The English pre-test indicated cuts were required to shorten the survey to the budgeted length. Finance Canada agreed with an approach suggested by Environics and the field proceeded. The pre-test interviews were kept as the changes did not negate their input.

Fieldwork

Interviewing was conducted by Elemental Data Collection (EDCI) using Computer Aided Telephone Interviewing (CATI) technology. Field supervisors were present at all times to ensure accurate interviewing and recording of responses. A minimum of 10 percent of each interviewer's work was unobtrusively monitored for quality control in accordance with accepted industry standards.

Data analysts programmed the questionnaire in CATI then performed thorough testing to ensure accuracy in set-up and data collection. This validation ensured that the data entry process conformed to the survey's basic logic. The CATI system handles sampling dialling, quotas and questionnaire completion (skip patterns, branching and valid ranges). The system also ensures that callbacks are conducted in a timely manner. No number is called twice in a two-hour period. Callbacks are conducted on different days of the week and at different times of the day (i.e., morning, afternoon). This system ensures all scheduled appointments are kept, maximizing the response rate and sample representativeness. Up to eight callbacks were made to reach each person selected in the sample.

Quality control

The questionnaire was programmed on a state-of-the-art Computer Assisted Telephone Interviewing (CATI) system. EDCI's interviewing facilities permit the constant supervision of interviewers and unobtrusive monitoring of calls, with between 10 and 30 percent of all interviews monitored for quality control purposes. All respondents were offered the opportunity to complete the survey in their official language of choice. All research work was conducted in accordance with the standards established by federal government Public Opinion Research (POR) requirements, as well as applicable federal legislation (Personal Information Protection and Electronic Documents Act, or PIPEDA).

Completion results

The sample for this survey consisted of 2,000 interviews with adult Canadians. The effective response rate for the survey is seven percent.¹ This is calculated as the number of responding participants (completed interviews

¹ This response rate calculation is based on a formula developed by MRIA in consultation with the Government of Canada (Public Works and Government Services).

plus those disqualified because of survey requirements and quotas being filled), divided by unresolved numbers (e.g., busy, no answer) plus non-responding households or individuals (e.g., refusals, language barrier, missed callbacks) plus responding participants [$R/(U+IS+R)$]. The disposition of all contacts is presented in the following table:

Completion results

Disposition of calls	TOTAL	Landline	Cell
Total Numbers Attempted	89,098	28,427	60,671
Out-of-scope - Invalid	58,160	15,145	43,015
Unresolved (U)	16,651	6,039	10,612
<i>No answer/Answering machine</i>	16,651	6,039	10,612
In-scope - Non-responding (IS)			
<i>Language barrier</i>	379	219	160
<i>Incapable of completing (ill/deceased)</i>	222	159	63
<i>Callback (Respondent not available)</i>	2,026	758	1,268
Total Asked			
<i>Refusal</i>	9,351	4,803	4,548
<i>Termination</i>	248	130	118
In-scope - Responding units (R)			
<i>Completed Interview</i>	2,000	1,171	829
<i>Non-Qualified - AGE</i>	44	0	44
<i>Non-Qualified - Quota Full</i>	17	3	14
Response Rate (%)	6.66	8.84	5.02
Incidence	97.04	99.74	93.46

The final incidence is 97% using the formula (*completes / (quota full + completes + non-qualified)*):

$$2,000/(17 + 2,000 + 44) = 97\%$$

Non-response bias analysis

The table below presents a profile of the final sample, compared to the actual population of Canada (2016 Census information). As is the case with most telephone surveys, the proportion of people aged 55+ interviewed is higher than in the population; this was corrected by age weighting. The final sample also somewhat underrepresents those with high school or less education, which is also a typical pattern for telephone surveys in Canada (e.g., older individuals and those with more education are more likely to respond to telephone surveys).

Sample profile

Sample type	Sample*	Canada (2016 Census)
Gender (18+)		
Male	49	49
Female	50	51
Age		
18-34	16	27
35-54	28	34
55+	56	39
Education level ^α		
High school diploma or less	27	35
Trades/college/post sec no degree	38	36
University degree	35	29

* Data are unweighted and percentaged on those giving a response to each demographic question

^α Actual Census categories differ from those used in this survey and have been recalculated to correspond. Statistics Canada figures for education are for Canadians aged 25 to 64 years.

Appendix C: Moderation guide

January 21, 2020

Environics Research
Focus Groups on Budget 2020
Finance Canada – Discussion Agenda
PN10649

1. Introduction to Procedures (5 minutes)

Welcome to this focus group. My name is [INSERT NAME] and I work for Environics Research, which is an independent market research company. We are conducting this research project on behalf of the Government of Canada.

We want to hear your opinions. Feel free to agree or disagree. Even if you are just one person among ten that takes a certain point of view, you could represent many people who feel the same way as you do. You don't have to direct all your comments to me; you can exchange ideas and arguments with each other too.

Some observers from the research team and from the Government of Canada are watching the session on the other side of the two-way mirror. We are also videotaping this session to help me write my report. The video will only be used internally to analyse the research and will not be released to anyone else. I may also take some notes during the group to remind myself of things.

Your identity and anything you say here will remain confidential and anonymous. Nothing you say here will be linked to you by name in any reporting we do on this project.

The session should last a little less than two hours, and the host/hostess will pay you your incentives at the end of the session. Please turn off your cell phones.

Let's go around the table so you can each introduce yourselves to the group. Tell us your name and a little bit about yourself – what kind of work you do, if you work outside the home, who lives with you in your house, that kind of thing.

2. Warm-up – General context (5 minutes)

Let's get started with a broad question. As you know, we have three level 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?

What has the government gotten wrong?

3. Canada's Economy and Deficits (10 minutes)

I want to focus a bit more on economic issues. What one word would you use to describe how the Canadian economy is doing these days?

How do you think the economy will be in coming year? Do you think things will get better or worse next year? Why? Why not?

Now, I want to shift focus a bit to the Government of Canada's financial situation. First, what is the government's current financial situation? Do they have a surplus or a deficit? Did they take in more than they spent, or spend 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 major concern for you personally or is not that big of a deal?

IF CONCERNED: Why does the deficit concern you?

Do you think the government should try to balance the budget as quickly as possible in the next year or two, or is this not such a big priority right now?

IF YES: What if balancing the budget that quickly meant having to cut government programs, or introducing new taxes?

IF NO: Can you share a little about why you feel that way?

4. Quality of life/Affordability/tax measures (15 minutes)

Over the past year, what would you each say has caused you the most stress in your life? Could you each write down one or two things and we will see what people came up with. (examples could include things like work, job loss, health, housing, income security, the environment, your children etc....).
PARTICIPANTS TO READ OUT WHAT THEY WROTE

Thinking about your own personal financial situation, what would you say specifically concerns you the most? (e.g. housing, childcare, telecommunications, car payments, student debt, drug costs etc....).
PARTICIPANTS TO READ OUT WHAT THEY WROTE

Have you heard about anything that the federal government has done recently to help Canadians deal with the rising cost of living or to make life more affordable? What?

What have you heard about recent changes to the federal income tax rates?

PROBE IF NOT MENTIONED: Has anyone heard about the Basic Personal Amount exemption being raised? (IF NECESSARY, EXPLAIN: The Basic Personal Amount on the Income Tax return will be gradually raised from \$12,069 to \$15,000 by 2023. This mean most Canadians would save close to \$300 in taxes every year). What do you think of that?

Here is a list of things that could relate to your quality of life. I want you to tell me which three items on this list are the most important to you personally and should it be a priority of the government of

Canada. Should it be done now or in the future? Is there anything on the list that you think the Government of Canada should **not** do.

MODERATOR TO GO DOWN THE LIST AND ASK HOW MANY PEOPLE PICKED EACH ITEM OR IDENTIFIED IT AS SOMETHING THE GOVERNMENT SHOULD NOT DO.

- Increase the CPP and QPP Survivor Benefit
- Increase the Canada Student Grants
- Implement a national pharmacare system
- Improve access to mental health services
- Improve access to a family doctor and nurse practitioner
- Make parental benefits tax-free
- Increase Old Age Security
- Invest in drug addiction care
- Increase the Canada Child Benefit (CCB)

5. Transition to a clean economy (15 minutes)

I want to discuss the whole issue of climate change and what it means for our economy. How would you rate the current level of action taken by the government of Canada to fight climate change? Do you think the government is doing enough, too much or not enough?

What do you think climate change will mean for the Canadian economy going forward?

When you hear people talk about transition to clean energy, what does that mean to you and what does it mean for the economy? Is it good or bad for the economy?

What will it mean for the oil and gas sectors? Can Canada both support its oil and gas industry while also taking action on climate change? Why? Why not?

What would be the best indicators of progress/success toward reducing Climate Change?

PROMPT IF NECESSARY (meeting our reduction target, implementing programs and initiatives, developing laws and policies)

Here is a list of items related to climate change that the government could do. I want you to circle the three that are the most important to you personally and put an 'x' beside anything on the list that you think the Government of Canada should **not** do.

MODERATOR TO GO DOWN THE LIST AND ASK HOW MANY PEOPLE CIRCLED EACH ITEM OR PUT AN X BESIDE IT.

- Work to plant two billion trees over 10 years
- Invest in protecting trees from infestations and help rebuild our forests after a wildfire
- Protecting 25 percent of Canada's land and 25 percent of Canada's oceans by 2025. Cut tax rates by 50 per cent for companies that develop and manufacture zero-emissions technology
- Create a new low-cost national flood insurance program
- Help Canadians make their homes more energy efficient and climate resilient
- Make zero-emissions vehicles more affordable
- Install up to 5,000 additional charging stations for zero-emissions vehicles
- Investing more in transit, including more electric transit and school buses
- High frequency rail between major cities
- More renewable energy and connecting our electrical grid from coast to coast

Is there anything else the Government of Canada should be doing in order to protect the environment and preserve Canada's natural legacy?

6. Health care (10 minutes)

I would like to discuss the issue of national pharmacare. Has anyone heard of the idea of national pharmacare? When you hear people talk about national pharmacare, what does that mean to you? **(If necessary, explain - improved coverage to pay for people's prescription medications).** What do you think of the idea?

There are many Canadians who have no drug coverage at all and have to pay for all medications out of pocket. What should we do for those people? Is this the kind of thing we should be willing to pay more tax for?

The Government has said that they want every Canadian to have access to a family doctor. How do you think they should go about achieving this goal?

When you think of the various areas the federal government could invest in to improve health care, which areas do you think they should focus on or prioritize?

PROMPT IF NEEDED: Increase Services related to mental health, Infrastructure (like more or newer hospitals, medical equipment, etc.), make it easier for people to access drug addiction treatment services.)

7. Community Safety (5 minutes)

When you hear people talk about safer communities, what does that mean to you?

What would you like to see the federal government do to help in making our communities safer?

POSSIBLE PROMPTS

- Banning military-style assault rifles
- introducing a buy-back program for military-style assault rifles
- Invest to help cities fight gang-related violence
- Help stop the flow of weapons at our borders

Is it important for you that military-style assault rifles are banned and that a buy-back program is implemented? Why? Why not?

8. Wrap up (5 minutes)

We have covered many topics today and really appreciate you taking the time and energy to come down here and give your opinion. Your input is very important and insightful. Before we leave today, I wanted to ask you whether you have any last thoughts that you want to give the Government of Canada about today's topics.

THANK YOU FOR PARTICIPATING!

Appendix D: Recruitment screener

December 20-2019

**Environics Research Group Limited
Focus Groups on Canada’s Economy Winter 2020
Finance Canada
PN10649
Recruitment for Group Discussion**

Respondent Name: _____

Home #: _____

Business #: _____

Group #: _____

Recruiter: _____

GROUP 1 Mississauga Monday, January 27 5:30 pm	GROUP 2 Mississauga Monday, January 27 7:30 pm	GROUP 3 Charlottetown Tuesday, January 28 5:30 pm	GROUP 4 Charlottetown Tuesday, January 28 7:30 pm
GROUP 5 Calgary Thursday, January 30 6:00 pm	GROUP 6 Calgary Thursday, January 30 8:00 pm	GROUP 7 Vancouver Saturday, February 1 12:00 pm	GROUP 8 Vancouver Saturday, February 1 2:00 pm
GROUP 9 Montreal (Longueuil) Monday, February 3 5:30 pm	GROUP 10 Montreal (Longueuil) Monday, February 3 7:30 pm	-	

Ten recruits per session. \$100 incentive.

Hello/Bonjour, my name is _____ from Environics Research. We are calling today to invite participants to attend a focus group discussion we are conducting on behalf of the Government of Canada exploring issues around the current state of the Canadian economy. This study is a research project, not an attempt to sell or market anything. Your participation in the research is completely voluntary, confidential and your decision to participate or not will not affect any dealings you may have with the government.

The format is a “round table” discussion led by a research professional. A video tape of the session will be produced for research purposes. The tapes will be used only by the research professional to assist in preparing a report on the research findings and will be destroyed once the report is completed. All information collected, used and/or disclosed will be used for research purposes only and administered as per the requirements of the Privacy Act.

The session will last a maximum of one hour and 45 minutes and you will receive a cash gift as a thank you for attending the session. May we have your permission to ask you or someone else in your household some further question to see if you/they fit in our study? This will take about 5 minutes.

NB: If a participant asks for information on the research company conducting the research they can be told: Environics Research is located at 33 Bloor Street East, Suite 900, Toronto Ontario and can be reached at 416-920-9010.

Yes.....1 – CONTINUE

No.....2 – THANK AND TERMINATE

1. Are you or is any member of your household or your immediate family employed in:

Type	No	Yes
A market research, communications or public relations firm, or an advertising agency		
Media (Radio, Television, Newspapers, Magazines, etc.)		
A federal or provincial government department or agency		
A political party		

IF YES TO ANY OF THE ABOVE – THANK AND TERMINATE

2. INDICATE:

Male 1 50/50 split

Female 2

3. How many people, including yourself, live in your household?

One ASK Q. 4

Two SKIP TO Q. 5

Three SKIP TO Q. 5

Four or more SKIP TO Q. 5

IF ONLY ONE PERSON IN HOUSEHOLD ASK:

4. Which of the following categories best corresponds to your total personal annual income, before taxes, for 2019?

READ - GET A MIX OF INCOMES

01 - Under \$30,000

02 - \$30,000 to \$60,000

03 - \$60,000 to \$80,000

04 - \$80,000 to \$100,000

05 - \$100,000 to \$150,000

06 - \$150,000 and over

99 - REFUSE/DK/NA

TERMINATE

ASK ALL FROM HOUSEHOLDS WITH MORE THAN ONE PERSON

5. Which of the following categories best corresponds to the total annual income, before taxes, of all members of your household, for 2019? **READ - GET A MIX OF INCOMES**

01 - Under \$30,000

02 - \$30,000 to \$60,000

03 - \$60,000 to \$80,000

04 - \$80,000 to \$100,000

05 - \$100,000 to \$150,000

06 - \$150,000 and over

99 - REFUSE/DK/NA

TERMINATE

ASK ALL

6. We have been asked to speak to participants from all different ages. So that we may do this accurately, may I have your exact age please? _____. WRITE IN

Under 18	TERMINATE
18-24 years of age	1
25-34 years of age	2
35-44 years of age	3 GET MIX
45-54 years of age	4
55-64 years of age	5
65-74 years of age	6
75 years or more	TERMINATE

7. Could you please tell me what is the last level of education that you completed? GET MIX

Some High School only.	1
Completed High School	2
Trade School certificate	3
Some Post secondary	4
Completed Post secondary	5
Graduate degree	6

8. Are you working (CHECK QUOTAS)?

Full Time (35 hrs. +)	4 minimum
Part Time (under 35 hrs.)	2 maximum
Homemaker	1 maximum
Student	1 maximum
Retired	2 maximum
Unemployed	1 maximum

9. What is your current occupation?

Type of Job

Type of Company

IF MARRIED ASK: WHAT IS YOUR SPOUSE'S OCCUPATION?

Type of Job

Type of Company

TERMINATE IF OCCUPATION RELATES TO EXCLUSIONS IN Q. 1

10. What is your ethnic background?

MISSISSAUGA AND VANCOUVER Recruit at least three 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). In other locations, there is no minimum, but it would still be desirable to have some.

11. 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 list)

Very comfortable	1- MINIMUM 5 PER GROUP
Fairly comfortable	2
Not very comfortable	3 TERMINATE
Very uncomfortable	4 TERMINATE

12. Have you ever attended a focus group or a one-to-one discussion for which you have received a sum of money, here or elsewhere?

Yes	1	MAXIMUM 5 PER GROUP
No	2	(SKIP TO Q.17)

IF YES ASK:

13. When did you last attend one of these discussions?

(TERMINATE IF IN THE PAST 6 MONTHS)

14. How many focus groups or one-to-one discussions have you attended in the past 5 years?

(SPECIFY)

IF 5 OR MORE, TERMINATE

15. What were the topics of the focus groups or one-to-one discussions have you attended in the past 5 years?

(SPECIFY) - IF "ECONOMY" OR "FINANCE," TERMINATE

16. 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	1 TERMINATE
No	2 CONTINUE

NOTE: 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.

17. 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 session will be taped and observed but your participation will be confidential. Do you consent to take part in the focus group?

Yes 1 CONTINUE

No 2 TERMINATE

18. We will contact you again before the date of the session to confirm your attendance. Do you consent to this?

Yes 1 CONTINUE

No 2 TERMINATE

INTERVIEWER TELL RESPONDENT

PLEASE BRING ALONG SOME FORM OF IDENTIFICATION AS YOU MAY BE ASKED TO SHOW IT.

19. Please bring along some form of identification as you will be asked to show it. Only you may attend, you cannot send a substitute. The session will be about an hour and a half in length, but we are asking that all participants arrive 15 minutes prior to the start time of the session. Are you able to be at the research facility 15 minutes prior to the session time?

Yes 1 CONTINUE

No 2 TERMINATE

I would like to invite you to a group discussion on _____. The session will last at most 2 hours and you will receive **\$100** to thank you for your participation.

Locations:

Mississauga – Monday, January 27th (5:30 and 7:30pm)

ACCE 2575 Dunwin Drive

Mississauga

Tel: (905) 828-0493

Charlottetown – Tuesday, January 28th (5:30 and 7:30pm)

MQO Research

119 Kent St.

Tel: 902-422-9264

Calgary – Thursday, January 30th (5:30 and 7:30pm)

Qualitative Coordination

707 10 Ave SW #120

Tel: (403) 229-3500

Vancouver – Saturday, February 1st (11am and 1pm)

CRC Vancouver

1398 West 7th Avenue

Tel: 1-866-455-9311

Montreal – Monday, February 3rd (5:30 and 7:30pm)

CRC Montreal

1610 Rue Ste-Catherine Ouest, Bureau #411

Tel: (514) 932-7511

INTERVIEWERS: Tell respondent that it is a small group and anyone who does not show or cancels at the last minute will compromise the project. Make sure they know we feel their opinions are valuable and we are serious about finding out what they have to offer.

NOTE: PLEASE TELL ALL RESPONDENTS THAT THEY WILL RECEIVE A CONFIRMATION CALL THE DAY PRIOR TO THE SESSION. IF FOR SOME REASON THEY HAVE NOT HEARD FROM US THEY SHOULD CONTACT US AT _____. IF THEIR NAME IS NOT ON THE ATTENDANCE FORM THEY WILL NOT BE ADMITTED TO THE GROUP. IF A RESPONDENT HAS ANY OTHER QUESTIONS ABOUT THE RESEARCH, THEY SHOULD ALSO CONTACT US AT THIS NUMBER.

Appendix E: Survey questionnaire

January 20-2020

Finance Canada Pre-Budget Survey (Winter 2020)

Hello/Bonjour, my name is _____ and I am calling from Environics 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

REVISED

D For analysis purposes only, what is your gender?

IF NECESSARY: Gender refers to current gender which may be different from sex assigned at birth and may be different from what is indicated on legal documents.

DO NOT READ LIST EXCEPT TO CLARIFY

Female	1
Male	2
Gender fluid or diverse, or non-binary	3
Other cultural gender identity (e.g. Indigenous two-spirit)	4
Prefer not to answer	99

E In what year were you born?

(RECORD YEAR - XXXX)

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

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

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

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

MAIN SURVEY

Assessments of Economy

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 d] REPEAT SCALE AS NEEDED

- a. the current state of the Canadian economy
- b. the current state of the [PROVINCE] economy
- c. the current state of your own personal financial situation
- d. the current price of gasoline

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

Q2a Using a scale from 1 to 10, where 1 is not at all affordable and 10 is completely affordable, how affordable are the following to you personally, if applicable: [RANDOMIZE a TO d] REPEAT SCALE AS NEEDED

- a. the cost of your monthly internet service?
- b. the costs your household pays for prescription drugs?
- c. the cost of your household’s groceries each week?
- d. the costs associated with raising your children?

Not at all affordable	1
	2
	3
	4
	5
	6
	7
	8
	9
Completely affordable	10
VOLUNTEERED	
Not applicable (no kids, no internet service etc.)	98
Not sure	99

Q2B How important is it for the Government of Canada to keep the following issues in mind when making Budget decisions? Please rank each on a 1 to 10 scale, where 1 means it is not at all important and 10 means it is very important.

(RANDOMIZE)

- a) (SPLIT SAMPLE: ½) Supporting middle class families to make life more affordable / (SPLIT SAMPLE: ½) Supporting middle class families to improve their quality of life
- b) Helping Canadians get a good job
- c) Making communities safer
- d) SPLIT SAMPLE: ½) Implementing a national program for prescription drug coverage (pharmacare) / SPLIT SAMPLE: ½) Ensuring the wealthiest Canadians pay their fair share
- e) Fighting climate change

Not at all important	1
	2
	3
	4
	5
	6
	7
	8
	9
Very important	10
VOLUNTEERED	
Don't know	99

Level of well-being

Q3 Thinking about your parents' generation when they were the same age you are now, would you say your generation is now better off, worse off, or about the same in terms of...?

READ AND RANDOMIZE

- a. Quality of life
- b. Health
- c. Financial security
- d. Educational opportunities
- e. Employment opportunities

01 - Better off

02 - Worse off

03 - About the same

VOLUNTEERED – DO NOT READ

98 - Depends

99 - DK/NA

Tax system and incentives

Q4 In your opinion, are each of the following groups currently paying the proper amount of taxes, or should they be paying more tax, or less tax, than they are now?

READ AND RANDOMIZE

- a. Big corporations
- b. Small businesses
- c. The top one percent of income earners
- d. Middle-income earners
- e. Lower-income earners

Should be paying less	1
Are currently paying the proper amount	2
Should be paying more	3

VOLUNTEERED

Don't know/Refused	99
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Affordable housing and helping first-time homeowners

And moving to a different topic...

Q6. Are you a homeowner or a renter?

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

Owner	1
Renter	2

VOLUNTEERED

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

Q7a. SPLIT SAMPLE (1/2 7A –1/2 7B): Using a scale from 1 to 10, where 1 is strongly disagree and 10 is strongly agree, to what extent do you agree or disagree with the following statements?

RANDOMIZE A-G

- a. If you needed to buy a home today, it would be easy to find somewhere to live that is both affordable and in a safe neighbourhood.
- b. IF RENTER AT Q6 ASK: The rent you pay is affordable on your current household income.
- c. IF OWNER AT Q6 ASK: The costs of living in your home (including mortgage payments and property taxes) are affordable on your current household income.
- d. It is very difficult for people to buy a house today, in the current economic climate.
- e. The federal government has a responsibility to address the lack of affordable housing in Canada.
- f. IF OWNER AT Q6 ASK: It was extremely important that you own a home, rather than rent.
- g. IF RENTER AT Q6 ASK: It is extremely important you be able to own a home in the future.

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

Q7b. SPLIT SAMPLE (1/2 7A –1/2 7B): To address the issue of *housing affordability*, to what extent do you think each of the following should be a priority area for the federal government? Please use a scale from 1 to 10, where 1 is not at all a priority and 10 is an extremely high priority.

RANDOMIZE A-E

- a. Making monthly mortgage payments more affordable for middle and lower income Canadians
- b. Increasing the availability of affordable housing.
- c. Continued investment in community housing
- d. Continued incentives for first-time home buyers
- e. Requiring developers to ensure that at least twenty percent of new housing is affordable for lower income families

Not a priority	1
	2
	3
	4
	5
	6
	7
	8
	9
An extremely high priority	10
VOLUNTEERED	
Don't know	99

And moving to a different topic...

Keeping Canadians safe and healthy

Q8 How effective do you think the following approaches would be at addressing gun-related violence? Please use a scale of 1 to 10, where 1 means not at all effective and 10 means extremely effective.

(READ AND RANDOMIZE A-D)

- a. Banning military-style assault rifles
- b. Buying back privately owned assault rifles to get them off the streets
- c. Providing funding to cities to fight gang-related violence
- d. Increasing funding for law enforcement related to gun violence

Not at all effective	1
	2
	3
	4
	5
	6
	7
	8
	9
Extremely effective	10
VOLUNTEERED	
Don't know	99

Transition to a clean economy

And moving to a different topic...

Q9 How would you rate the current level of action taken by the Government of Canada to fight climate change? Please use a scale from 1 to 10, where 1 is terrible and 10 is excellent.

Terrible	1
	2
	3
	4
	5
	6
	7
	8
	9
Excellent	10
VOLUNTEERED	
Don't believe climate change is real/happening	97
Not sure	99

Q10 How effective do you think the following approaches would be in reducing pollution and protecting the environment? Please use a scale of 1 to 10, where 1 means not at all effective and 10 means extremely effective.

(READ AND RANDOMIZE A-E)

- a. Helping Canadians make their homes more energy efficient and climate resilient
- b. Providing incentives or tax cuts to businesses to develop new clean technology
- c. Making zero-emissions vehicles more affordable
- d. Increasing the amount of protected land and inland waters
- e. Planting two billion trees

Not at all effective	1
	2
	3
	4
	5
	6
	7
	8
	9
Extremely effective	10
VOLUNTEERED	
Don't know	99

Reconciliation

And moving to a different topic...

Q11 How effective do you think the following Government of Canada initiatives would be at achieving reconciliation between Indigenous and non-Indigenous Canadians? Please use a scale of 1 to 10, where 1 means not at all effective and 10 means extremely effective.

(READ AND RANDOMIZE)

- a. Working with Indigenous groups to improve their access to physical and mental health care services
- b. Living up to the spirit and intent of treaties and agreements with Indigenous peoples
- c. Promoting economic development and self-reliance for Indigenous peoples
- d. Compensating Indigenous people harmed under the child welfare system
- e. Continue to implement the recommendations of the *National Inquiry into Murdered and Missing Indigenous Women and Girls*
- f. Issuing official apologies for past government policies that have negatively affected Indigenous communities

Not at all effective	1
	2
	3
	4
	5
	6
	7
	8
	9
Extremely effective	10
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 IF NECESSARY—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 languages 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

I2 Which of the following best describes how you would identify yourself?

Poor	1
Working class	2
Middle class	3
Upper-middle class	4
Wealthy	5
[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