ENVIRONICS
RESEARCH

Qualitative and Quantitative Research on Canada's Economy – Winter 2016 Final Report

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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. The primary objective of the research was to explore current attitudes among Canadians towards:

- the overall state of the Canadian economy,
- strengths and weaknesses of the economy,
- the state of the local economy,
- specific issues such as the value of the dollar, price of gas and interest rates,
- what sort of action is expected from the federal government, and,
- attitudes about the upcoming federal budget and the expected deficit and infrastructure spending.

The research objectives are to explore Canadians' overall concerns and perceptions about the current state of the Canadian economy, emerging economic issues and their expectations about the role of the Government of Canada in the economy.

Methodology

Qualitative phase

Environics Research conducted a series of 14 focus groups with members of the general population between January 25 and 30, 2016. Two sessions were conducted in each of Toronto, London, Calgary, Vancouver, Montreal, Quebec City and Moncton. In each community one session was conducted with lower and middle income Canadians and one session was conducted with higher income Canadians. Nine sessions were conducted in English and five sessions were conducted in French. The fourteen sessions were distributed as follows:

Date and time	Group Composition
January 25, 5:30 p.m. EDT	Low/Middle income – Toronto, Ontario
January 25, 8:00 p.m. EDT	Higher income – Toronto, Ontario
January 26, 5:30 p.m. EDT	Low/Middle income – London, Ontario
January 26, 7:30 p.m. EDT	Higher income – London, Ontario
January 27, 5:30 p.m. MT	Low/Middle income – Calgary, Alberta
January 27, 7:30 p.m. MT	Higher income – Calgary, Alberta
January 27, 5:30 p.m. EDT	Low/Middle income – Montreal, Quebec
January 27, 7:30 p.m.	Higher income – Montreal, Quebec

Date and time	Group Composition
EDT	
January 28, 5:30 p.m. PAC	Low/Middle income – Vancouver, British Columbia
January 28, 7:30 p.m. PAC	Higher income – Vancouver, British Columbia
January 28, 5:30 p.m. EDT	Low/Middle income – Quebec City, Quebec
January 28, 7:30 p.m. EDT	Higher income – Quebec City, Quebec
January 30, 10:30 a.m. ATL	Low/Middle income – Moncton, New Brunswick
January 30, 12:30 p.m. ATL	Higher income – Moncton, New Brunswick

The groups lasted approximately 120 minutes, and consisted of between 8 and 10 participants (out of 10 people recruited for each group).

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.

Quantitative phase

Environics conducted a telephone survey with 1,007 adult residents of Canada, from February 10-28, 2016. A survey of this size will yield results which can be considered accurate to within +/- 3.1 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%)	102	+/- 9.7
Quebec	(24%)	250	+/- 6.2
Ontario	(38%)	300	+/- 5.7
Prairies/NWT/Nunavut	(17%)	204	+/- 6.9
B.C./Yukon	(13%)	151	+/- 8.0
CANADA	(100%)	1,007	+/- 3.1

* In percentage points, at the 95% confidence level

Cost of research

The cost of this research was $154,903.47 (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, followed by 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 charts due to rounding.

Use of findings of the research. By gauging and analyzing 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

Overall more people identified economic issues as the top issue for the government to focus on than any other issue. These included a range of issues and concerns, most of which relate to jobs/ unemployment, the sagging Canadian dollar, and an increasingly challenging level of cost of living

When asked to describe the current state of the Canadian economy, there was a general feeling that the economy would continue to struggle and that things would get worse before they got better, with a good contingent in each group feeling that Canada could in fact be in a recession within the next year or so.

When participants were asked to circle words that they felt best described the current state of the Canadian economy, they tended to pick words with a negative connotation. The most commonly circled words were "fragile," "decline," "sluggish," "stagnant," and "weak."

This fragile economy was seen as vulnerable on a variety of different fronts. Some of the more common "threats" raised by participants included over-reliance on natural resources such as oil, exposure to the world economy, outsourcing of jobs to other countries, the volatile value of the Canadian dollar and a general perceived shortage of good quality jobs.

Specific concerns varied from city to city. In Toronto and Vancouver participants raised the high cost of living. In London there was discussion about manufacturing. In Calgary concerns revolved around the impact of the falling price of oil. In Montreal issues around poor infrastructure were raised and in both Montreal and Quebec City there were concerns about economic impacts of recent spending cuts by other levels of government. In Moncton there were concerns about the lack of economic diversification.

Most participants agree that the state or direction of the Canadian economy in general does affect them in one way or another. Although their personal economic condition may not perfectly reflect how the overall economy is performing, participants still feel their lives are somehow affected. The recent fall in the value of the Canadian dollar was one factor that clearly had a direct impact on many people. Lower gasoline prices and low interest rates were seen as good things and most people were not directly affected by falling stock prices.

There was some sense that leadership on the economy is needed from the federal government and that it should take a "hands on" approach by spending money to stimulate the economy, even if this meant running a deficit. Given the choice, people tended to feel that spending that was focused on infrastructure would benefit the economy as a whole and would have more economic spin-offs compared to targeted measures.

Most participants have no problem with running a deficit to stimulate the economy, but beyond that, have difficulty identifying the size of an acceptable deficit. Roughly four years seemed a reasonable timeframe to most for a return to a balanced budget.

Key findings – quantitative phase

Assessment of economy

The economy and unemployment remain the top focus for the federal government (38%, up 13 points from February 2015). About one-quarter have a positive perception of the Canadian economy and three in ten are negative – and about half expect no change to the economy in the next six months, while one-quarter each expect it to improve or get worse. Canadians are now more positive about the U.S. economy compared to their own (37% vs. 23%), a reversal of opinion from February 2015. Provincial economies get the most positive ratings in B.C., Manitoba and Saskatchewan; Albertans and Atlantic Canadians are the most negative.

Pessimism about the economy is also evident in Canadians' rating of the Canadian dollar, with nearly six in ten who say the current CDN$ is negative for them personally, mainly due to the low value compared to the US$, and the resulting higher costs for goods and travel. Canadians are more positive about the current price of gasoline; just over half say the current price is positive for them personally, largely due to affordability and the fact that it is cheaper than it has been. Current interest rates get mixed ratings: four in ten are positive, one-quarter each are neutral or negative, and one in ten are unsure. Positive views of current interest rates are largely attributed to good borrowing conditions, while those who are negative mainly cite a poor environment for savings and investments.

Personal financial situation

Just over half of Canadians rate their personal financial situation as good; three in ten give a neutral rating and two in ten say it is bad. Three in ten express concern that they or someone in their household may lose their job in the next six months.

Taxes

Canadians are divided on whether they pay too much (49%) or the right amount of taxes (44%). However, a majority of seven in ten say taxes are mostly a positive thing, because they pay for important things like health care, education and roads; two in ten say taxes are mostly a negative thing because they take money out of people's pockets, and hold back economic growth and wealth creation.

Government finances & priorities

Three-quarters of Canadians believe the federal government is running a deficit (74%, up from 55% in June 2015); one in ten believe finances are in balance and six percent believe the government is running a surplus. Saying the government is in a deficit position is higher in Saskatchewan, Manitoba and Atlantic Canada, and lowest in Quebec and BC/Yukon.[1]

1 Finance Minister Bill Morneau released a fiscal update on February 22, during the survey fieldwork period, that indicated a projected deficit of $18.4 billion. The proportions saying the federal government is running a deficit are statistically comparable for respondents interviewed before and after that date.

Over half say federal government decisions have a significant impact on the Canadian economy, compared to three in ten who believe world conditions mainly impact the economy and one in ten who believe both come into play.

Strong majorities of seven to eight in ten say all of the proposed job-related actions should be a priority for the GOC, especially creating new jobs, skills training for those who have recently lost a job, creating jobs for young people, and investing in skills training/retraining programs. Canadians view encouraging innovation, infrastructure spending and support for new industries as the most effective economic policies; improved border infrastructure is the least likely to be linked to growing the economy, although Canadians are somewhat more convinced when provided with additional information about this policy. Although none of the suggested descriptive terms stands out as the most appealing, "stimulate" and "revitalize" emerge as the most popular for the federal government to use when framing its approach to dealing with the economy.

Political neutrality statement and contact information

I hereby certify as a Senior Officer of Environics Research Group 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 contain any reference to electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leader.

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Introduction

Finance Canada commissioned Environics Research Group to conduct qualitative public opinion research among Canadians. The primary objective of the research was to explore current attitudes among Canadians towards:

- the overall state of the Canadian economy,
- strengths and weaknesses of the economy,
- the state of the local economy,
- specific issues such as the value of the dollar, price of gas and interest rates,
- what sort of action is expected from the federal government, and,
- attitudes towards the upcoming federal budget and the expected deficit and infrastructure spending.

Background

It is a challenging time for the global economy. The IMF now expects global growth of 3.1 per cent in 2015 – its slowest pace since the Great Recession of 2009. Canada's economic performance in the first half of 2015 was poor, mainly due to the collapse in oil prices that occurred late last year. Commodity prices are softening, affecting terms of trade and making important inputs more expensive. Going forward, the risks to the Canadian outlook remain tilted to the downside.

Growth projections have now fallen short of what was reported in Budget 2015, and it has become clear that global economic conditions will remain unfavourable. This has important implications for our currency and our fiscal situation. It is important for the Department of Finance to continue to obtain information on the public environment into which government actions will be communicated. The use of quantitative and qualitative research will allow the Department to get 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.

This research is conducted three times a year and will help to inform the development of Budget 2016 and the Fall Update.

I. Detailed findings – qualitative phase

A. Priorities for the Government of Canada

Overall more people identified economic issues as the top issue for the government to focus on than any other issue.

Participants were asked to identify what they believe should be the priority for the Government of Canada these days. Some of the more common themes that surfaced included the following:

- **The Economy:** The economy is identified spontaneously much more than any other issue as a top priority for the federal government. This is a relatively broad topic that captures a range of issues and concerns, most of which relate to jobs/ unemployment, the sagging Canadian dollar, and an increasingly challenging level of cost of living. The lower and middle income groups were more inclined to feel a growing gap between the rich and the poor and that poverty is more of a concern now than it has been in the past. Their sense of a growing economic dichotomy was largely driven by two trends: first, by the increase in the cost of living resulting directly from the low Canadian dollar, and second, from salaries not being able to keep pace with this increase in the cost of living. Participants also raised challenges like needing to create more added-value manufacturing in Canada, and becoming less resource-based.
- **Healthcare:** A few participants noted the long wait times and the short and medium-term implications of the various budget cuts happening at the provincial levels.
- **The environment:** A few were optimistic the federal government would become more focused on sustainable development and making the environment a national priority.
- **Refugees and National Security:** Another theme, much more noted in the province of Quebec than in other parts of the country, was a concern with the pace and nature of the welcoming of refugees over the recent past. Although participants did not have reason to believe that there have been lapses in this area, they did want to make sure that national security remained a priority throughout the refugee welcoming exercise. They seemed particularly concerned that the pace at which refugees or immigration in general was happening lent itself to potential for lapses in security.
- **Immigration:** Immigration was discussed in a few different ways, including needing to strike the right balance between attracting immigrants versus making sure it does not compromise our own ability to thrive economically. Some also raised the need to revisit foreign credential recognition.
- **The "oil economy":** Some were also concerned with how our economy will buffer the drop in the price of oil and how the federal government will re-prioritize economic development, and more specifically diversify natural resource development.

Other issues that were raised included Aboriginal rights and issues, benefits for seniors, affordable housing, veteran's affairs, and a need to revisit our national energy strategy.

B. Current economic situation in Canada

When asked to describe the current state of the Canadian economy, there was a general feeling that the economy would continue to struggle and that things would get worse before they got better, with a good contingent in each group feeling that Canada could in fact be in a recession within the next year or so.

When participants were asked to circle words that they felt best described the current state of the Canadian economy, they tended to pick words with a negative connotation. The most commonly circled words were "fragile," "decline," "sluggish," "stagnant," and "weak". This view was equally shared among all socio-economic segments and across all regions. People pointed to a range of headlines, signals and indicators to explain this sentiment, with many highlighting the fall of the value of the Canadian dollar and the drop in the price of oil as evidence of this decline.

- Other noteworthy "signals" included various announcements of cuts and layoffs as much in the public sectors as in the private sectors. Some did admit to regions, companies or sectors hiring but these seemed to be outweighed by the number of cuts and layoffs and by their perception that many of the jobs being created are part-time, low-income or temporary, rather than "solid" full-time positions.
- Some also felt that Canadians were not yet aware of the federal government plan to address Canada's economic difficulties, thus leaving the country in a somewhat "fragile" position with some degree of short-term uncertainty.

This fragile economy was seen as vulnerable on a variety of different fronts. Some of the more common "threats" raised by participants included:

- Over-reliance on natural resources (leaving Canada vulnerable to the cyclic nature of those industries), a general lack of economic diversification (especially among participants in Western and Atlantic Canada), and a persistent inability to create 'added-value' industries.
    - The oil industry was often mentioned in this context as the best example of how our economy has suffered because of the drop in the price of oil and how we have not managed over the years to become more involved in the transformation of this resource into secondary products. Several people also noted that in recent years, the federal government had over-emphasized the oil industry and that we were now paying the price for what they have come to judge as a short-term vision of the economy.
- Exposure to the world economy is a constant threat to our economy, especially our exposure to the US economy;
- Job outsourcing to other countries;
- The persistent devaluation or even a steeper fall of the Canadian dollar;
- High labour costs in manufacturing areas like London were seen as a possible deterrent to firms settling in the area;
- A shortage of good quality jobs, coupled with perceived high immigration levels, led a few to feel that unemployed and underemployed Canadians were having to compete with newcomers for scarce jobs.

The prognosis for the economy is not particularly positive either. Most people felt that things would get worse before they got better, with a good contingent in each group feeling that Canada is either in the midst of an important economic downturn or that it could be in a recession within the next year or so. Participants are not seeing the low Canadian dollar benefiting exporters as much as it should and are worried that the low Canadian dollar will continue to take its toll on the economic welfare of Canadians through higher prices for regular consumer goods. Some also sensed that the impact of the slowdown in the Asian economies and the oil glut was still just starting to impact us.

- It was notable that in Calgary, people noted that things were bad but they still seemed confident that this was yet another Alberta boom and bust.

The Canadian economy is not, however, without its fair share of strengths and assets. Many feel there are a variety of reasons the Canadian economy has withstood the recent financial crisis that rocked many other countries and which can still serve as strong pillars on which Canadians can lean, to counter future economic headwinds. Many feel that although we should be doing more with our natural resources, the depth and breadth of this national asset remain a significant strength for our economy. This would include water, oil and gas, mining, forestry, and agriculture. Many participants also highlighted the social fabric in Canada as being "economic strengths," in particular our skilled and educated labour force, our social and healthcare support systems and the fact that Canada is a clean, safe, and peaceful country. Some also emphasize that another key strength is our stable banking system. Tourism also came up as a strength in a few instances.

Although Canadians tend to have some sense of how the domestic economy is performing and the direction in which it is headed, few seemed to have a firm grasp of how Canada is performing in relation to other countries around the world. We are seen as doing better than Greece or countries in the developing countries but there was less of a feeling that Canada was doing well vis à vis the US. It was noted that Canada had escaped the worst of the great recession but that now the US seemed to be doing better and gaining momentum. The fact that the Canadian dollar had plunged so much so fast was seen as the strongest evidence of this. Many felt that a head to head comparison with Europe was difficult simply because that region was made up of economies that are just too diverse and performing at different levels.

C. Local economic issues

In addition to discussions about the economy in general, specific themes were explored in each city:

- **Toronto:** The high cost of living was a sensitive issue in Toronto, whether it be with respect to the price of housing, insurance, or everyday commodities. Despite appealing interest and mortgage rates, some noted that home ownership was not an option for many. Some also perceive a growing gap between rich and poor and particular challenges around employment such as no jobs for young people and underemployment (i.e. skilled workers not finding employment in their field).

- **London:** There is a feeling that things are getting better, that unemployment is lower than before, and that local employers are actively looking for employees. Most of this is seemingly supported by a low Canadian dollar. Locals also feel that their diverse economy has allowed them to weather recent economic storms. There is also a sense that their economy continues to diversify, especially in terms of high tech firms. However, participants still feel more can be done to attract and grow manufacturing in the area.
- **Calgary:** Participants are clearly sensing that they are going through a difficult period - the downtown seems more empty, there are ongoing layoffs in oil and gas, hotels and restaurants are not as busy, etc. However, Alberta is still considered a relatively wealthy place, oil remains a significant asset for the province, and some said it was still not as bad as the early 80s. There is some frustration attributed to the fact that the region keeps reliving the same oil-based booms and busts and that diversification has not taken root or that more refineries have not been built.
- **Vancouver:** Similar to what was voiced in many other parts of the country, there is growing concern among Vancouver participants of growing disparity between high income and low income households. Some even feel that there is now a serious issue with poverty, and with more and more regular, educated and fully employed people living paycheque to paycheque. Participants are concerned about increasing real estate costs, which in turn increase property taxes, and further limit the ability of residents to purchase their first home. The recent increases in the cost of every day goods simply add another layer to the financial challenge.
- **Montreal**: Participants in Montreal shared the same general sentiment of sluggishness and fragility regarding the economy as participants in other parts of the country. Participants were inclined to blend provincial issues and cuts with federal initiatives which prompted some to voice concerns with being overtaxed and that basic social services were at risk or suffering. With respect to infrastructure participants all agree that infrastructure is in need of repair in the metropolitan area, but noted that the awarding and management of public contracts will need to be carefully administered.
- **Quebec City**: Participants note while live in an economy that has usually been supported by the provincial civil service, it is currently fragile and sluggish. Participants referenced recent challenges with Bombardier, the cooling off of the residential market and construction in general, and of recent and imminent cuts in the provincial civil service, all of which tend to leave participants feeling lukewarm about the current and short-term economic prospects for their region.
- **Moncton**: Participants in Moncton showed high levels of concern with the economy in general and their own regional economy in particular. Participants were more aggressive in their belief that change is needed, leaning somewhat closer to "major restructuring" compared to participants in other regions, noting that job prospects for youth are bleak, leading many to leave the region. One key issue that seems to be driving much of the concern is the lack of local economic

diversity. They felt the local economy was over-reliant on natural resources and that bold moves need to be taken.

D. Perspectives on specific economic indicators and issues

Few participants would agree that the state or direction of the Canadian economy in general does not affect them in one way or another. Although their personal economic condition may not perfectly reflect how the overall economy is performing, participants still feel their lives are somehow affected.

Throughout each session, Canadians specifically discussed the extent to which specific economic trends and issues were having an impact on them personally.

One of the trends that tended to spontaneously come up in each region was **the decline of the Canadian dollar**. It was clear that for many people the low dollar is a metaphor for a weak economy. It makes people lose confidence in the state of the Canadian economy because it means that the world is "devaluing" Canada. Although a few in each session argued that a relatively lower Canadian dollar should benefit exporters and in turn should benefit the broader Canadian economy, this does not seem to be materializing, or at least not as much as one would expect. Conversely, the decline in the Canadian dollar is impacting individuals in a much more direct fashion by making a lot of regular consumer goods and groceries imported from the US increasingly more expensive. From a tourism perspective, a low Canadian dollar should lead to a boon for domestic tourism from both Canadians and foreigners. Many people spoke of having to cancel trips to the US or other destinations (in the Caribbean for instance) where the US dollar is the main currency, in favour of either "stay-cations" or destinations like Mexico. Ultimately, the fact that the dollar has fallen so far so fast was alarming and while it may help exports it was felt that its value (roughly 70 cents U.S. at the time) was too low.

Most people noted that **gasoline was now cheaper than before** and that nearly all were benefiting from these lower prices. There was also an almost universal sentiment that, while the price of oil had fallen by two-thirds, gasoline prices had not declined nearly as much. Lower prices at the pump are actually one of the rare "silver lining" stories these days for consumers. There are some who would have expected that lower fuel costs would have helped offset the higher costs for imported goods and travel but that this does not seem to be happening. Some also speculate that there is price gouging occurring in the fuel industry.

Low interest rates and mortgage rates are often seen as a good thing, especially in a difficult economy. A few older and more affluent participants pointed out that these low rates also meant very little return on investments and were bad for RRSPs, but many participants generally felt that they were personally benefiting. In a few sessions participants mentioned the "double-edged sword" aspect to these low rates – that many Canadians were accumulating significant amounts of debt to the point where any

meaningful increase in lending rates could put many people "underwater", compelling some to feel that a spike in rates could threaten the Canadian economy.

Most participants were not concerned about the **decline of the stock market**, especially those in the lower and middle income sessions. Those with an RRSP noted that they were only affected if they needed to withdraw from their RRSP at this time; otherwise they simply needed to wait until the value of their stock portfolio rose again, which they assumed it would. When further prompted, participants tended to agree that a drop in the stock market typically represents a weakness in the economy but few would go as far as to alter their own general consumer or savings behaviour because of any changes in the stock market. In the end, only a few in each session actually track the stock market.

While job losses and unemployment were a central theme in the focus groups few had concerns about their own **job security.** That said, many noted they had friends or family members whose job security was a genuine concern, and some commented that their income may be compromised in the current economy – in other words **income security** is at risk for some.

E. Federal government actions

There was some sense that leadership on the economy is needed from the federal government and that it should take a "hands on" approach by spending money to stimulate the economy, even if this meant running a deficit. Given the choice, people tended to feel that spending that was focused on infrastructure would benefit the economy as a whole and would have more economic spin-offs compared to targeted measures.

Although there is general agreement that Canada is part of a global economy and that there are many aspects of our own economy, such as the price of oil, that are beyond our control, most participants agree that the Federal Government can also have a meaningful impact on the direction and performance of the economy. When specifically asked whether the Federal Government should be proactive with respect to the economy these days, nearly all participants were in agreement.

While there was general agreement that leadership on the economy is needed from the federal government, participants had some difficulty articulating top-of-mind solutions. Broad themes proposed included:

- Further diversify the economy (especially noted in Western and Atlantic Canada);
- Create more opportunities to transform our natural resources before exporting them – in other words, increase the added-value of exported goods rather than exporting primary resources and then importing the finished goods;
- Encourage innovation and research and development;
- Invest in infrastructure;
- Encourage foreign investment or introduce incentives to encourage companies to settle in Canada or build factories in Canada;
- Diversify international markets for Canadian exporters;
- Find a way to transport oil to Canada's coasts / build pipelines;
- Reduce income taxes to alleviate the cost of living and address the growing gap between rich and poor;
- Foster the creation of high value jobs;
- Make it easier for unemployed or underemployed Canadians to get the skills they need to find jobs that pay well and that are in demand – skilled trades were often mentioned in this context;
- Support small and medium sized business by facilitating access to funding.

Participants were presented with a choice between measures that address the overall economy, such as infrastructure spending, and measures targeted at helping individual Canadians or families and then asked which approach is most likely to stimulate the economy. People tended to feel that spending that was focused on infrastructure would benefit the economy as a whole and would have more economic spin-offs. There was a sense in most groups that there is an infrastructure deficit in this country and that Government investment in this area would be welcomed.

Participants tended to consider short-term economic benefits when evaluating the merits of infrastructure spending, such as job opportunities in the construction sector, increased

activity for construction suppliers, etc. However, they also stressed the need for long-term vision and planning rather than one that is patchwork and reactionary.

As appealing as the notion of infrastructure spending was to many participants, it seemed that there were at least one or two projects that came up in each region that reminded participants of undelivered promises (e.g. subway lines that have been in the plans for years but have yet to materialize), inadequate planning (e.g. highways that were planned years ago but come nowhere close to meeting the needs of commuters today) or mismanagement (e.g. construction projects in Quebec). From a terminology perspective, most people understand that the term "infrastructure" refers to roads, bridges, public transportation, buildings, railroads, airports, ports, and utilities. A few also felt it included technology, Internet and telecommunications infrastructure.

Targeted spending tended to be an interesting option in the lower and middle income sessions where participants felt this was a more effective way to provide money to those who needed it the most. In this way, this type of measure was more likely to be seen as a social policy than as an economic policy. To the extent that any "targeted" measures could help, there was some receptivity to training programs, better pensions, tax breaks/ credits, or a relaxation of EI rules.

Various terms were proposed to participants who were then asked to select the one that they feel best reflects what they would want the Government to do with respect to the economy.

- The notion of "kick-starting" the economy implied to most that the economy was totally stalled, and thus not an apt description for any Government action, albeit the French translation of this term, which is "*relancer*," did resonate well with Francophone participants.
- "Shock absorber" or "accelerate" suggested slowing things down or muffling the economy rather than spurring it on.
- "Stimulate" was somewhat appealing though there are some associations with the "stimulus" in the US which was not always a positive comparison. The French equivalent (*stimulant*) did not raise any comparisons with the US at all and was better received.
- Aside from "stimulate" the words that resonated best tended to have the preface "re", such as revitalize and re-imagine, and to which we can add *relancer* from the francophone sessions. These terms were most likely to suggest that some sort of change or transformation is needed to succeed and to move forward, whereas the other terms were more apt to just suggest more of the same, and possibly not learning from our past errors. Participants seemed to agree that change was needed to overcome the current sluggishness and set the country up for long term economic success.
- The appeal of the "re" words was not universal however. There were some mixed views on the notion of "restructuring" the economy. The word itself has some appeal but it can also sound a bit too drastic for an economy that most do not see as in need of radical measures. Similarly, to re-imagine the economy was seen by some as inspiring and refreshing whereas for others it was seen as a bit ambitious and dramatic, something they could see a company doing but not the Government.

Although change is seen as warranted by participants, the economy is not in such a state that a "major restructuring" is needed – as noted above, radical measures are not needed here. Most feel we are still on solid ground and that many aspects of the economy are fine. Most likened a "major restructuring" to what is needed in Greece, whereas the Canadian economy might just need mid-range adjustments.

The term "green investment" was also explored with participants. In all sessions, it has positive connotations and is generally seen to be synonymous with benefiting or protecting the environment or at a minimum involving investment that is mindful of the environment. For many, a Government making green investments is one investing in renewable energy sources such as wind and solar, it is one that encourages consumers and businesses to recycle, it is one that promotes construction, manufacturing and economic development in general achieved through or resulting in reduced environmental footprints, etc.

The notion of a Government making "green investments" was not however immediately clear to some participants, who felt that the concept is too broad to be meaningful, has become a bit of a catch-phrase and is overused by marketers.

F. Perspectives on the federal budget

Most participants have no problem with running a deficit to stimulate the economy, but beyond that, have difficulty identifying the size of an acceptable deficit. Roughly four years seemed a reasonable timeframe to most for a return to a balanced budget.

The notion of running a deficit elicited a range of opinions and positions among participants and even presented a bit of a dilemma to some. On the one hand, participants want the Federal Government to be fiscally responsible and run balanced budgets each year, while on the other hand they feel that running a short term deficit is acceptable and for a few, even necessary given the current state and direction of our economy, especially if the purpose is clear and responsible and there is a plan to get to a balanced budget. A few also noted that the low interest rate environment makes it a particularly attractive time to borrow money to stimulate the economy.

Most people are comfortable with a deficit if it is to stimulate the economy, but stressed that there must be a plan to balance the budget at some point in the future, typically within four years. Participants also noted that money must be well spent and that deficits should not be used as temporary solutions that do not deal with the cause of a problem. Finally, a few participants cautioned that they would not be interested in having their taxes increased in order to return to balanced budgets, especially those who felt they are already taxed too heavily."

While emphasizing the need to return to balanced budgets in the future, most participants were unsure of whether or not the Federal Government has been historically running a deficit or a surplus, with many simply assuming that the Government has been running deficits for decades. Additionally, most could not specify what would constitute a large or a small deficit, and there was only vague awareness that the Federal Government would soon table its first budget.

Given this backdrop, most participants simply assumed that a deficit would be announced as part of the next Federal budget. Furthermore, a few in each session, noted that the federal government had previously announced that it would run a deficit

While few were aware that the deficit was projected to be $10 billion (at the time), participants either expressed indifference because they lacked context to gauge whether this was a small or large amount, or defaulted to a sense that this was a large deficit. When told that a deficit of $10 billion represents roughly 3% of the overall Federal budget, most noted that in this case, the deficit is quite small. Conversely, some also feel that if $10 billion only represents 3% of the budget, then it should be relatively easy to balance the budget.

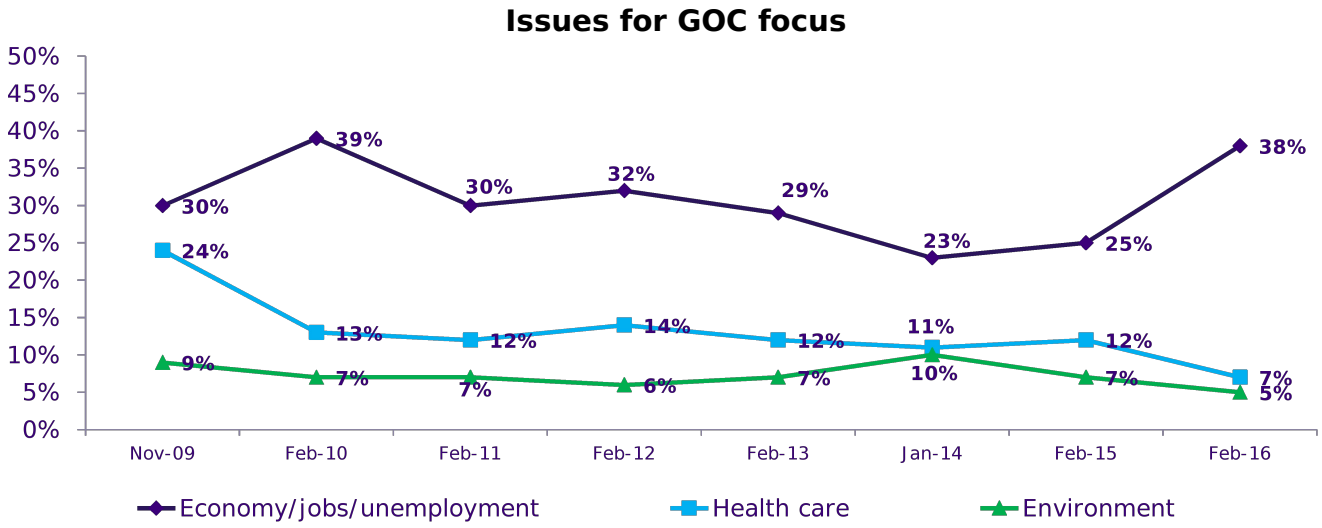
II. Detailed findings – quantitative phase

A. Assessment of the economy

Issues for GOC focus

The economy/employment remain the top focus for the federal government

The combined areas of the economy (26%) and related issues of employment, unemployment and job creation (13%) continue to be where Canadians want the government to concentrate, and this concern has increased since February 2015. Health care and the environment run a distant second, and other issues are mentioned by fewer than five percent each.



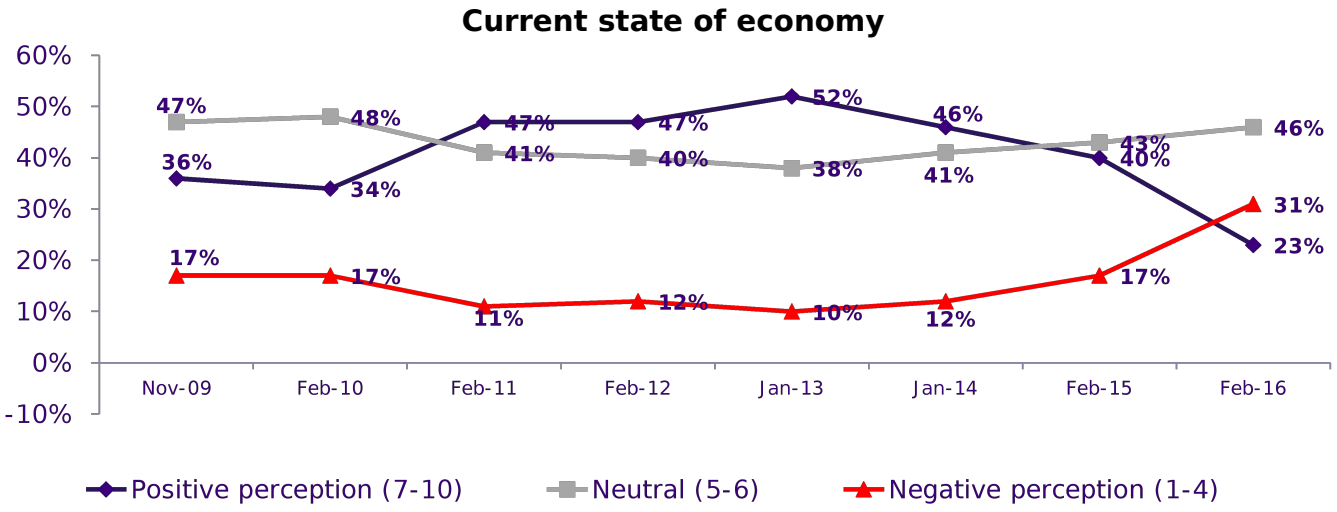
Q1A Thinking of the issues facing Canada today, which one would you say the Government of Canada should focus on most? [TOP MENTION]

Mentions of the economy/jobs are highest in Alberta/NT (57%) and the Atlantic region (48%), and among men (42% vs. 35% of women), those with household incomes of $150,000 or more (50%), those age 35 and over (42%), and university graduates (42%).

Current state of the Canadian economy

Around one-quarter have a positive perception of the current state of the economy; three in ten are negative

When asked to rate the current state of the national economy, just under one-quarter say it is good (score of 7 to 10), a plurality of just under half are neutral (score of 5 or 6) and three in ten say it is bad (score of 1 to 4), a perception that has almost doubled since February 2015.



Q2 How would you rate the current state of the Canadian economy? (Please use a scale from 1 to 10, where 1 is terrible and 10 is excellent.)

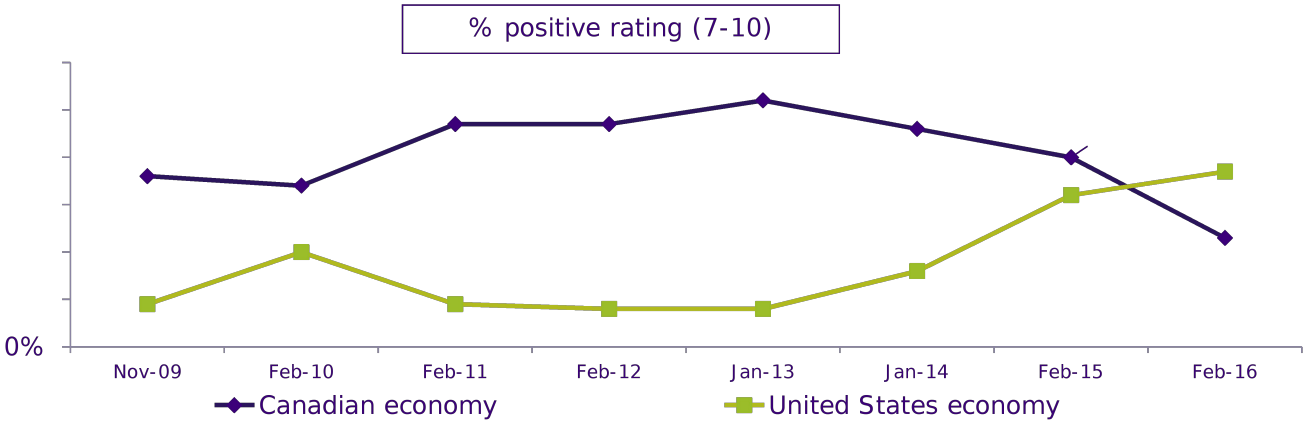
Responses are generally similar across most subgroups of the population. Rating the economy as bad is higher in Alberta/NT (46%), and among those who, later in the survey, think the economy will be getting weaker or that Canadians pay too much in taxes. Those who are not employed have similar views to those who are.

Canadian economy compared to US economy

Canadians are more likely to be positive about the current U.S. economy than about Canada's

Due to the decrease in the proportion who think the national economy is doing well, Canadians are now notably more likely to rate the U.S. economy as better than our own. However, the mean ratings are not as dissimilar: 5.9 for the U.S. and 5.1 for Canada.

Current economies comparison



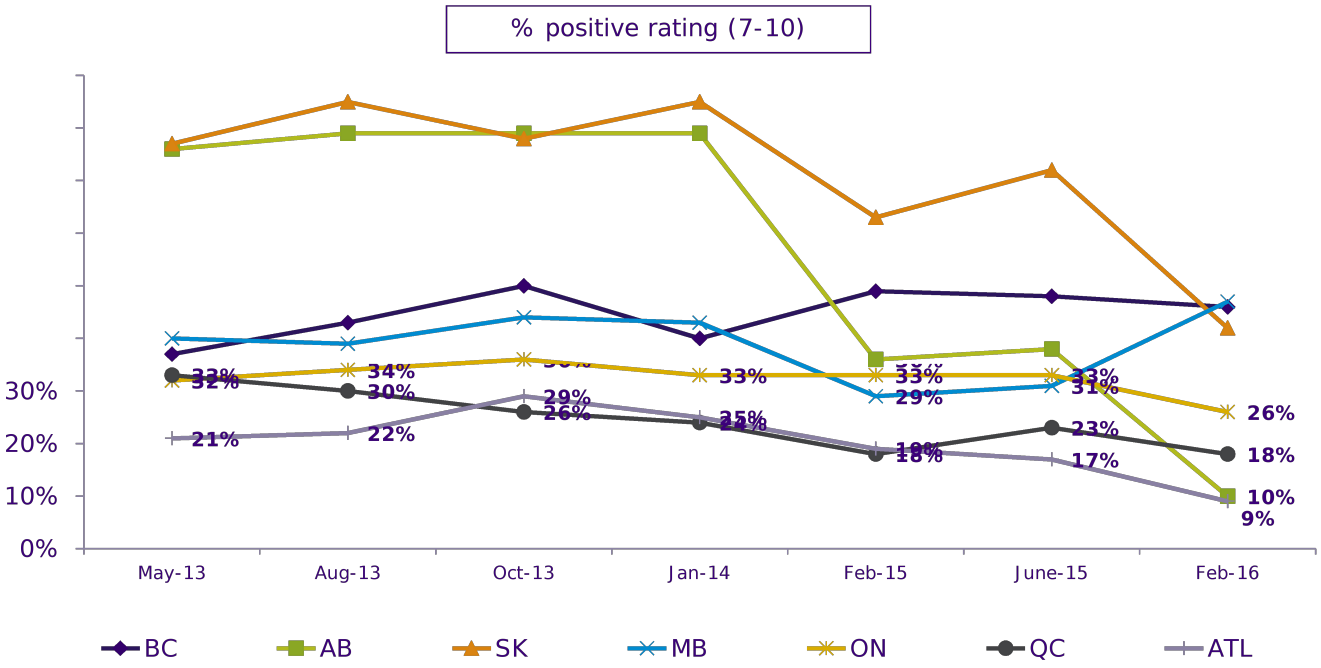
Q2,3 How would you rate the current state of the Canada/United States economy? (Please use a scale from 1 to 10, where 1 is terrible and 10 is excellent.)

Rating the U.S. economy as good is generally similar across the country and most population subgroups, but somewhat higher among men (43% vs. 31% of women), university graduates (44%) and Allophones (52%).

Provincial economies

B.C., Manitoba and Saskatchewan residents are the most likely to rate their province's economies positively; Albertans and Atlantic Canadians are the most negative

Provincial economies comparison



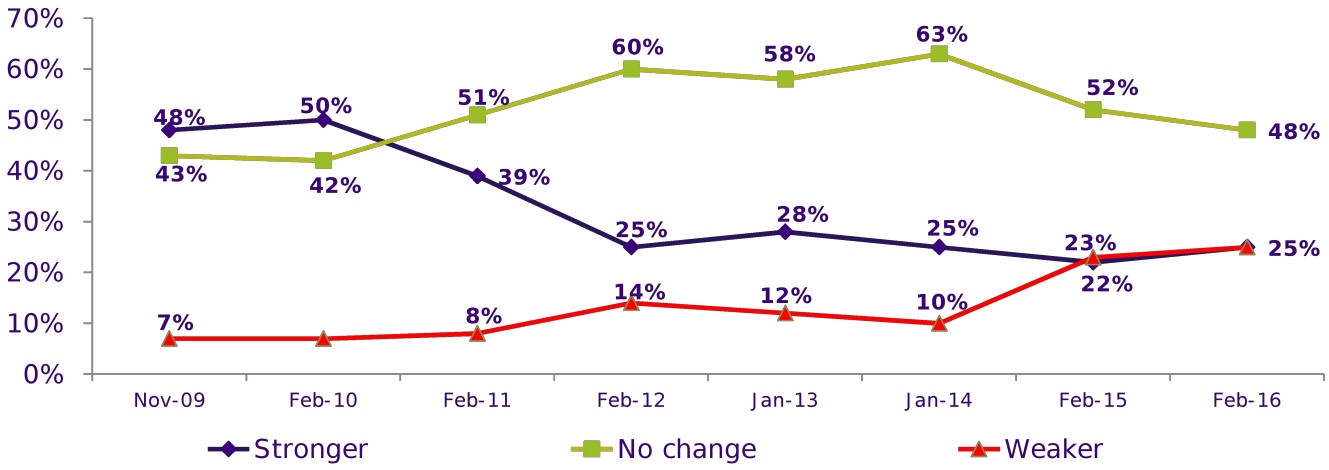
Q4 How would you rate the current state of the [PROVINCE/TERRITORY] economy? (Please use a scale from 1 to 10, where 1 is terrible and 10 is excellent.)

Direction of Canadian economy

Similar to February 2015, about half of Canadians expect no change to the economy over the next six months

Close to half of Canadians are not anticipating change in the national economy over the next six months, while one-quarter each think it will get better or get worse.

Direction of Canadian economy



Q5 Over the next six months, do you think the Canadian economy will be stronger, weaker, or will there be no change?

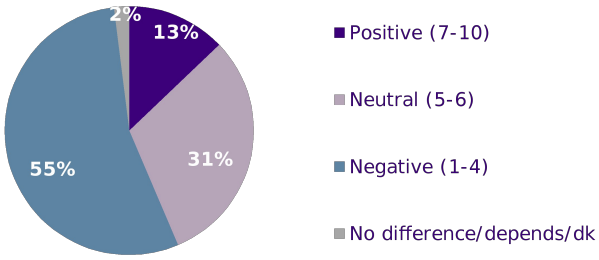
Expecting the economy to remain the same is the dominant response across the country and most subgroups, but is somewhat higher among residents of Quebec (61%), Francophones (60%) and those age 35-54 (54%). Saying the economy will get weaker in the short term is slightly higher among residents of Alberta/NT (32%) and Saskatchewan (43%), and those with household incomes of $150,000 or more (35%).

Value of the Canadian dollar

More than half say the current CDN$ value is negative for them personally

Canadians were asked to indicate, on a scale of 1 (very negative) to 10 (very positive), the personal impact of the current value of the dollar. More than half indicate the dollar's value is negative for them (score of 1 to 4), while just over one in ten say it is positive (score of 7 to 10), and three in ten provide a neutral rating (5-6).

Value of Canadian dollar

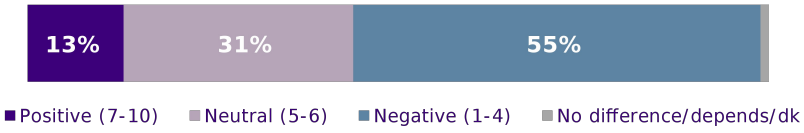


Q6 For you personally, how would you rate the current value of the Canadian dollar? Please use a scale from 1 to 10, where 1 is very negative for you and 10 is very positive for you.

Majorities across the country and most subgroups provide a negative rating for personal impact of the current CDN$ value, with the exceptions of those not working (49%), those who think the economy will get stronger in the next six months (48%), and the small number who think Canadians pay too little in taxes (43%).

Reasons for impact of value of the Canadian dollar

Those positive about the value of the CDN$ mention improved exports or not being affected; negative impacts include higher costs for goods or travel



Positive **Top comments**	n=129 %
Good for economy – improves export sales	17
CDN$ low compared to US$	15
Not personally effected/don't travel	12
Dollar is low/weak (general)	10
Dollar is where it should be/stable	10
Good for economy (general)	6
Good for economy – U.S. will do more business	5

Negative **Top comments**	n=557 %
Dollar is low/weak (general)	33
CDN$ low compared to US$	21
Costs Canadians more to travel	20
Shopping/groceries more expensive	10
International exchange rate is low/poor	9
Costs more to import/trade/do business	6
Shopping online/buying o/s Canada more $	6

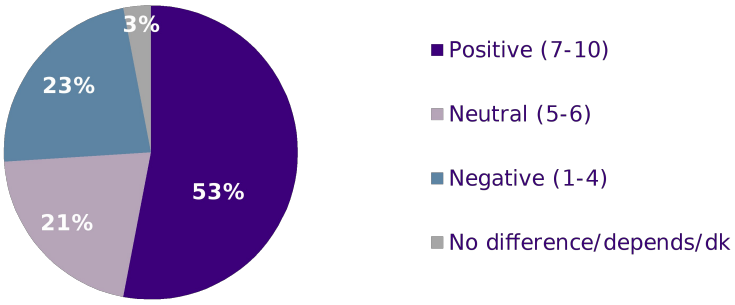
Q7 What makes you say that?

Impact of current price of gasoline

Just over half say the current price of gasoline is positive for them personally

In contrast to the value of the dollar, just over half of Canadians say the current price of gasoline is good for them personally.

Impact of current price of gasoline

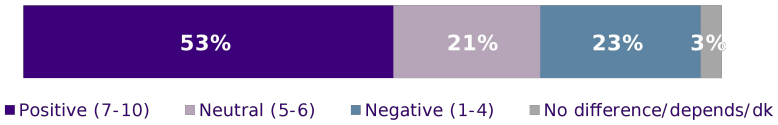


Q8 For you personally, how would you rate the current price of gasoline? Please use a scale from 1 to 10, where 1 is very negative for you and 10 is very positive for you.

Saying the price of gas is positive is the dominant view across the country, ranging from a low of 44 percent in BC/YK to a high of 61 percent in Saskatchewan. It is also the dominant response across population subgroups, but marginally higher among Francophones (59%), and those who think the economy will become stronger (56%) or remain stable (55% vs. 46% who think it will get worse).

Reasons for impact of current gas prices

Those positive about gas prices say it is affordable or lower than recently; those who are negative still think the price is high



Positive Top comments	n=537 %
Price is affordable/cheap/low at the pump	45
Lower than recent prices/paying less	36
Bad for overall economy	8
Current price specified	7
Price is unstable/fluctuates	6
Price is high/expensive	6
Based on price of oil/cost per barrel	5

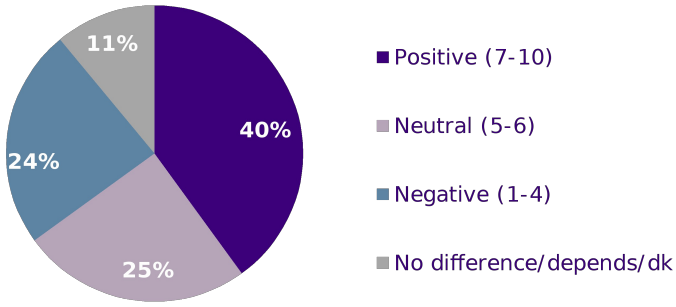
Negative Top comments	n=226 %
Price is high/expensive	48
Based on price of oil/cost per barrel	22
Price is unstable/fluctuates	20
Bad for overall economy	15
Price is affordable/cheap/low at the pump	9
Lower than recent prices/paying less	5
Current price specified	5

Q9 What makes you say that?

Impact of current interest rates

Four in ten Canadians find current interest rates to be personally positive; one-quarter each say they have a neutral or negative impact, and one in ten say this does not make much difference to them (2%), it depends (1%) or are unable to say (8%).

Impact of current interest rates

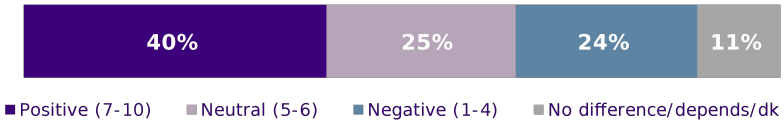


Q10 For you personally, how would you rate current interest rates? Where 1 is very negative for you and 10 is very positive for you.

Saying that interest rates are positive is the dominant view across the country and most subgroups, but is somewhat higher among men (45% vs. 36% of women) and among those of mortgage-bearing age (35 to 54 - 52%) than their younger (31%) or older (35%) counterparts, who are more likely than middle-aged Canadians to report some negative impact. Current interest rates are deemed positive by higher proportions of those with household incomes of $80,000 or more; those with the lowest household incomes are least likely to say they are positive (28% under $40,000) and most likely to say they are negative (35%). Saying interest rates are personally positive is also higher among those who are working full-time (50%), and those who have completed college (43%) or university (44% vs. 33% with high school or less).

Reasons for impact of interest rates

Those who note positive impacts of interest rates say it is because they are good for borrowing; those who think it is negative say rates are bad for savings or investments



Positive Top comments	n=390 %
Interest rates are low/down	37
Good for mortgages/credit cards/cheap to borrow	28
Interest rates are good (general)	11
Interest rates connected to economy/CDN$	8
Rates are where they should be/stable	6

Negative Top comments	n=253 %
Poor for savings accounts/return on investments	21
Interest rates are high/up	16
Interest rates are low/down	12
Interest rates are poor (too low/too high)	9
Not affected/have no loans/credit cards	6
Interest rates are connected to economy/CDN$	6
Poor for mortgages/credit cards	5

Q11 What makes you say that?

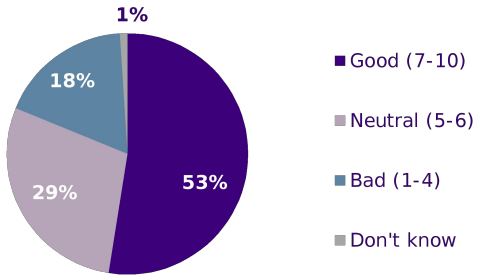
B. Personal financial situation

Rating of personal financial situation

Just over half rate their personal financial situation as good

Just over half of Canadians rate their personal financial situation as good (score of 7-10). Three in ten provide a neutral rating (5 or 6), and just under two in ten say their situation is bad (score 1-4).

Personal financial situation rating



Q12 How would you rate your own personal financial situation? Please use a scale from 1 to 10, where 1 is terrible and 10 is excellent.

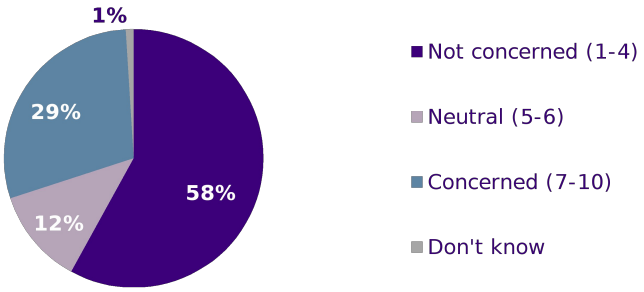
Having a good personal financial situation is reported by slim majorities across most of the country, with the exceptions of Saskatchewan (44%) or the Atlantic region (49%). There is no difference by gender, but there is an age effect, with younger Canadians being less likely to report a positive position (47% age 18 to 34) than their older counterparts (55%). Positive ratings increase as household income increases, from a low of 27 percent under $40,000 to a high of 87 percent with $150,000 or more. Being positive is higher among those working full-time (61%) or retired (57%) than those working part-time (37%) or not employed (32%), and higher among those with a university degree (63%) than those with high school or less education (39%). A positive position is reported somewhat less by Allophones (40%) than those who speak English (53%) or French (56%) in the home.

Concern about job loss

Three in ten express concern about household job loss

Three in ten Canadians express concern that they or someone in their household may lose their job in the next six months; one in ten (11%) are very concerned (give a score of 10). Just under six in ten have little to no concern (just under four in ten – 37% – are not at all concerned) and one in ten (12%) express a neutral view.

Concern about job loss



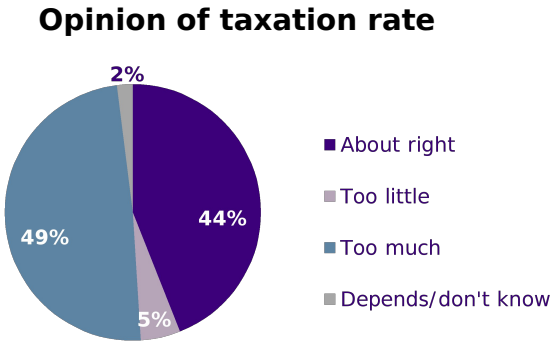
Q13 How concerned are you, if at all, that you or someone in your household may lose their job in the next six months? Please use a scale from 1 to 10, where 1 is not at all concerned and 10 is very concerned.

Concern about potential job loss is highest in Alberta/NT (45%) and lowest in BC/YK (20%). Concern is also expressed more by those age 54 and under (32%) than those 55 and over (23%), and by those in the lowest household income bracket (35% with $40,000 or less) than more affluent Canadians. Being concerned about potential household job loss is also higher among those who are not working themselves (46%), those with high school or less education (35%), Anglophones (30%) and Allophones (39% vs. 22% of Francophones), and those who think the economy will get weaker in the next six months (37%).

C. Taxes

Opinion of taxation rate

Half say Canadians pay too much in taxes; just over four in ten think tax levels are about right, and only five percent think taxes are too low.



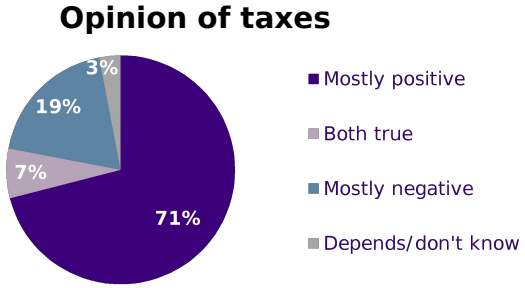
Q14 Thinking about the level of taxes that Canadians as a whole pay, compared to the services that are provided by governments, do you feel that Canadians pay too much, about the right amount, or too little in taxes?

Saying that Canadians pay too much in taxes is a slim majority view in Ontario (53%), Quebec (52%) and around half each in the Atlantic region (50%) and Manitoba/NU (48%); it is a minority view in BC/YK (35%) and Saskatchewan (42%); Alberta/NT residents are equally likely to say taxes are too high (46%) or about right (46%). Those age 35 and over are more likely than their younger counterparts to say taxes are too high, while the latter are the most likely to think they are about right. There is no notable difference by household income level, but thinking taxes are too high decreases as level of education

increases. Saying taxes are too high is also linked to thinking the economy will be getting worse over the next six months.

Opinion of taxes

When presented with two views on taxes, a strong majority of seven in ten lean more to the view that taxes are a mainly positive thing because it is how important things are paid for; two in ten say they are mostly negative because it takes money out of pockets and holds back growth and the creation of wealth. Seven percent say both positions are equally true



Q15 ROTATE ORDER OF STATEMENTS:
Some/other people think of taxes as mostly a positive thing, because they are how we pay for important things that make our quality of life good, such as health care, education, and roads.
Some/other people think of taxes as mostly a negative thing, because they take money out of people's pockets and hold back economic growth and the creation of wealth.
Which one of these views is closer to you own?

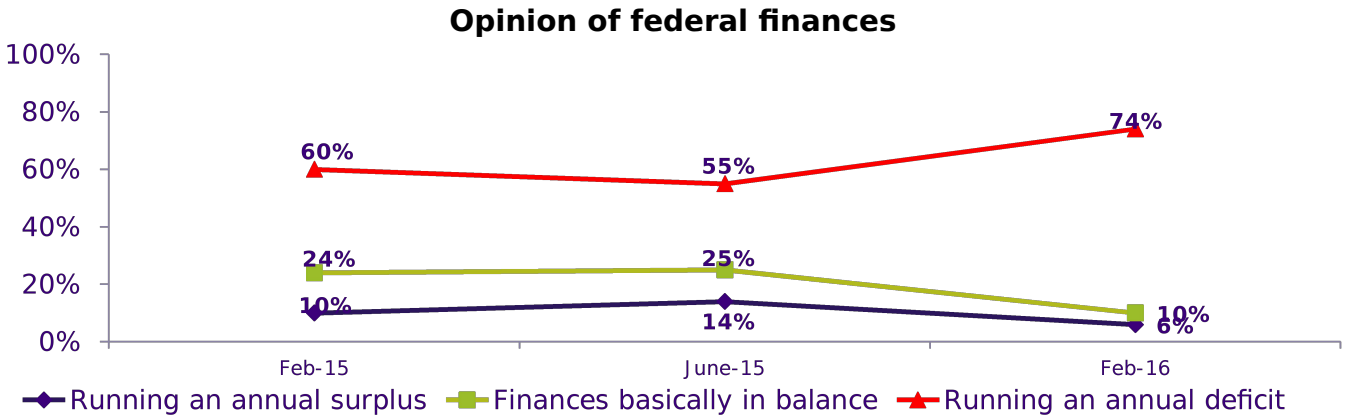
That taxes are mainly positive is the dominant view across the country and most population subgroups, but is somewhat lower in Saskatchewan (51%) than elsewhere. Saying taxes are mainly positive is higher among women (76% vs. 66% of men) and is also higher among younger Canadians (78% age 18 to 34), those who think the economy is poised to become stronger (81%) or be stable (72% vs. 60% who say it will get worse), and those who think Canadians pay the right amount (92%) or too little (90%) in tax (vs. 50% who say taxes are too high).

D. Government finances and priorities

Opinion of federal finances

Three-quarters of Canadians think the federal government is running a deficit

Three-quarters of Canadians say the federal government is currently running a deficit; one in ten think the nation's finances are basically in balance, and six percent think there is a surplus. The proportions saying the current state is a deficit are statistically similar whether Canadians were surveyed before the February 22 announcement of a projected deficit (73%) or after (76%).



Q16 Based on what you know, what is the current state of federal government finances – is the government... [ROTATE ORDER]:
Running an annual *deficit*, meaning they are *spending* more money than they are *receiving*
Running an annual *surplus*, meaning they are *receiving* more money than they are *spending*
ALWAYS READ LAST: or are their finances basically in balance?

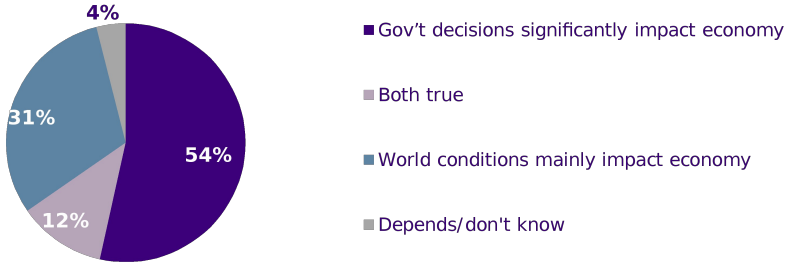
Saying the country is in deficit is the dominant response across the country, but somewhat higher in Saskatchewan (85%), Manitoba (85%) and the Atlantic region (82%) than elsewhere; it is lowest in Quebec (70%) and BC/YK (68%). Saying there is a deficit increases as age increases and is higher among those working full-time (76%) or retired (82%), those with any post-secondary education (76%), and those who think the economy will be getting weaker (89%) or is the most important issue (80%).

Impact on economy of GOC actions vs. world conditions

Over half of Canadians say federal government decisions have a significant impact on the Canadian economy

When read two statements about forces influencing the national economy, Canadians are more likely to say it is the decisions and actions of the federal government that have a significant impact, than to think the economy is buffeted by world conditions over which our government has little influence.

Impact on economy of GOC actions vs. world conditions



Q17 ROTATE ORDER OF STATEMENTS:
Some/other people say the decisions and actions of the federal government can have a significant impact on the state of the Canadian economy.
Some/other people say that the state of the economy is mainly affected by world conditions and our government has little influence.
Which of these is closer to your own view?

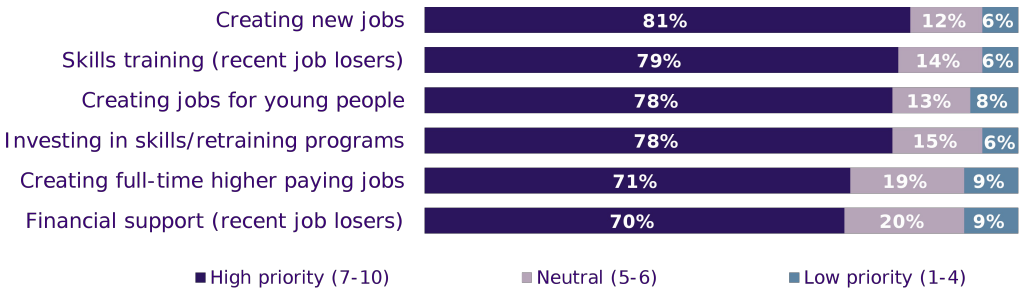
That federal government has more influence on our economy than outside forces is the dominant view across much of the country (the exception being Manitoba/NU, 30%, vs. world conditions, 41%) and population subgroups.

Government priorities

Strong majorities say all job-related actions are a priority; support is slightly lower for higher paying jobs or financial aid for those recently out of work

At least seven in ten Canadians think each of six job-related actions are a high priority, with creating new jobs, skills training for those who have recently lost a job, creating jobs for young people, and investing in skills and retraining programs for Canadians have skills to find jobs all being deemed a high priority (score of 7-10) by about eight in ten. Seven in ten feel the GOC should place a high priority on creating full-time higher-paying jobs or providing financial support for those who have recently lost jobs, to help them get back on their feet.

Government priorities



Q18 Next, how much of a priority, if at all, should each of the following be for the Government of Canada? Please use a scale from 1 to 10, where 1 means very low priority and 10 means very high priority.

Rating most of these actions as a government priority is somewhat higher among Quebec residents, women, those in the lower household income brackets, those working part-time or not currently working, and those who expect the economy to improve in the next six months.

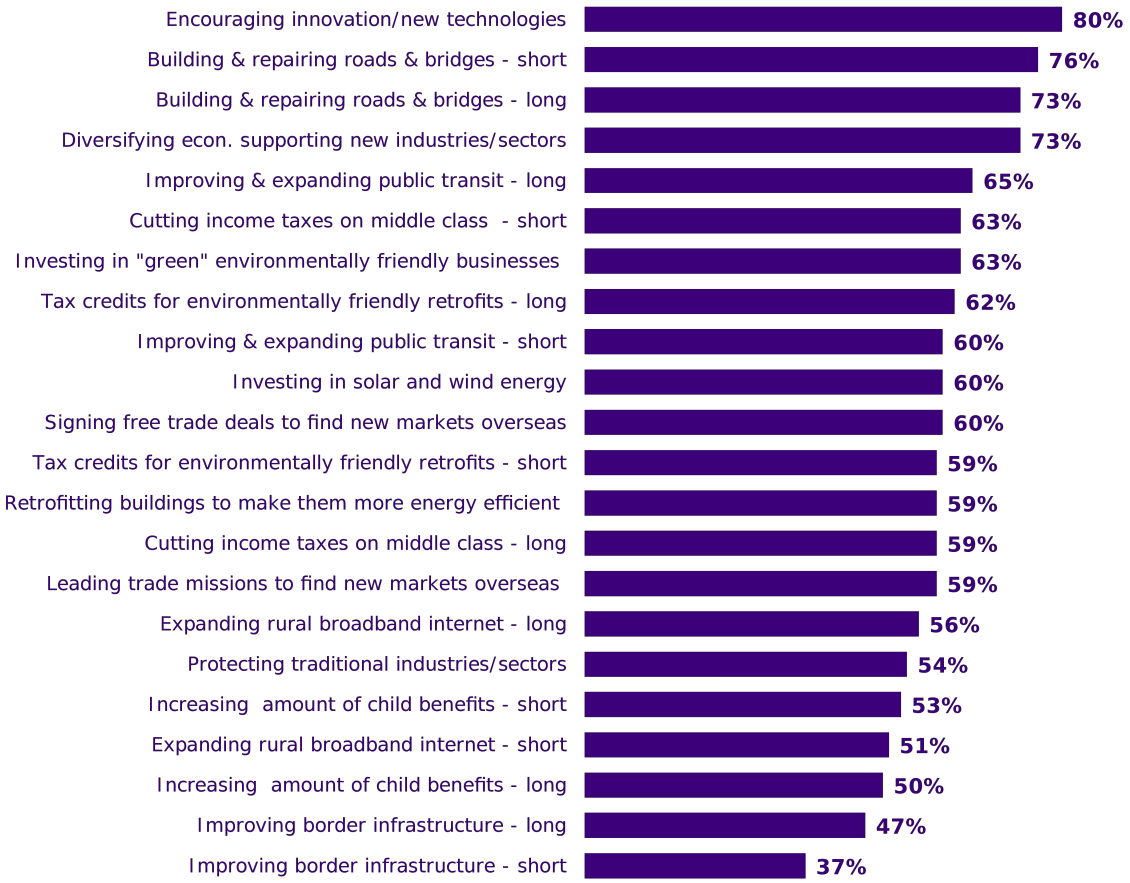
Perceived effectiveness of policies

Encouraging innovation, infrastructure spending and support for new industries are deemed most effective economic policies

Of a list of potential policies that could help grow the economy, Canadians give the highest effectiveness ratings (scores of 7-10) to encouraging innovation and new technologies in Canadian businesses, building and repairing roads and bridges (with or without a longer explanation), and diversifying the economy by supporting new and emerging industries and sectors. Around two-thirds also feel that it would be effective to improve and expand public transit to relieve traffic congestion and reduce commute times, cut income taxes in the middle class (a longer explanation does not help) and invest in green businesses. Canadians are least likely to link improved border infrastructure with growing the economy, although an explanation helps. Results are fairly similar across the population, but in general, higher ratings are given by Quebecers and those in lower socio-economic groups.

Perceived effectiveness of policies

% effective rating (7-10)



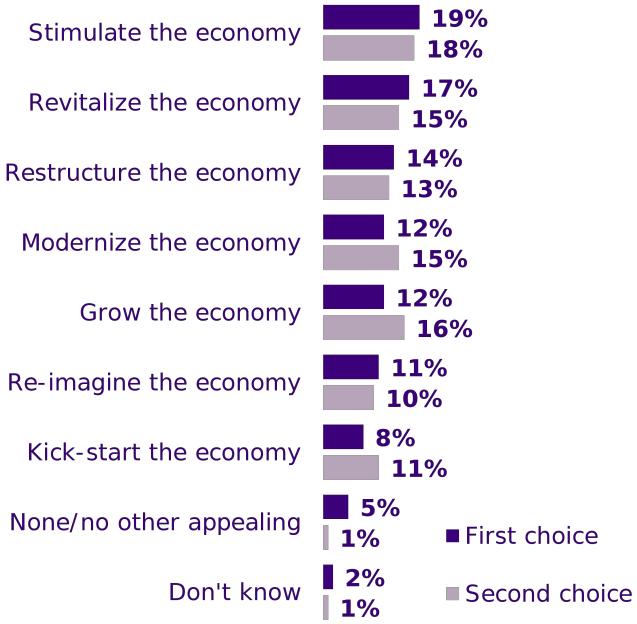
Q19 Thinking of Canada's economy, how effective, if at all, do you think each of the following policies would be when it comes to growing and improving Canada's economy? Please use a 10-point scale, where 1 means not at all effective and 10 means very effective. Base: SPLIT SAMPLE (c. 500 asked each item)

Preferred terminology

"Stimulate" or "revitalize" are marginally preferred terms for describing the federal government's approach to the economy

Of a list of terms that could be used to describe the federal government's approach to dealing with the economy, none stand out as a strong preference. However, there is a slight preference for the terms "stimulate" and "revitalize," and less interest in "kick-starting."

Preferred terminology



Q20 There are different words that could be used to describe the federal government's approach to dealing with the economy. Which one of these do you personally find most appealing? The government will...

Having "stimulate the economy" as a first choice is similar across the country, but lower in Saskatchewan and Manitoba than elsewhere; Manitobans are the most likely to say "restructure" is their first choice, while residents of Saskatchewan (18%) and Alberta/NT (12%) are the most likely to say none of these options is appealing.

Opinions are generally similar by population subgroups. "Stimulate the economy" is the first choice of somewhat more age 55 and over than younger residents. Allophones find "restructure" more appealing than do those who speak English or French at home.

E. Conclusions

Canadians are well aware that the country's economy is not in a good position. Even those who find low gas prices or interest rates personally advantageous sometimes mention these are bad for the economy as a whole. At the same time, there is a strong feeling that the national economy is not helplessly tied to world conditions, that federal government policies can make a significant difference, and the economy and jobs should be its main focus. There is widespread understanding that the federal government is running in a deficit position.

There is strong support for most job-related policies, but widespread job creation and skills training are seen as somewhat higher priorities than are creating high-paying jobs or providing financial support to those who have recently lost their jobs.

Supporting new technologies/companies and undertaking major infrastructure projects are thought to be the most effective ways to grow and improve the country's economy. The public is less likely to see support for traditional industries, expanded child benefits or border infrastructure improvements as being effective routes to economic growth.

In general, longer explanations of the reasons for specific policies do not make a dramatic difference in assessments of their effectiveness; it only appears to assist when the link of the action to the economy is not immediately obvious to start with. There is no strong preference in terminology around improving the economy, but the words "stimulate" and "revitalize" seem to resonate somewhat more than "reimagine" or "kick start."

Appendix A: Qualitative methodology

Environics Research conducted a series of 14 focus groups with members of the general population between January 25 and 30, 2016.

Group composition

Two sessions were conducted in each of Toronto, London, Calgary, Vancouver, Montreal, Quebec City and Moncton. In each community one session was conducted with lower and middle income Canadians and one session was conducted with higher income Canadians. Nine sessions were conducted in English and five sessions were conducted in French. The fourteen sessions were distributed as follows:

Date and time	Group Composition
January 25, 5:30 p.m. EDT	Low/Middle income – Toronto, Ontario
January 25, 8:00 p.m. EDT	Higher income – Toronto, Ontario
January 26, 5:30 p.m. EDT	Low/Middle income – London, Ontario
January 26, 7:30 p.m. EDT	Higher income – London, Ontario
January 27, 5:30 p.m. MT	Low/Middle income – Calgary, Alberta
January 27, 7:30 p.m. MT	Higher income – Calgary, Alberta
January 27, 5:30 p.m. EDT	Low/Middle income – Montreal, Quebec
January 27, 7:30 p.m. EDT	Higher income – Montreal, Quebec
January 28, 5:30 p.m. PAC	Low/Middle income – Vancouver, British Columbia
January 28, 7:30 p.m. PAC	Higher income – Vancouver, British Columbia
January 28, 5:30 p.m. EDT	Low/Middle income – Quebec City, Quebec
January 28, 7:30 p.m. EDT	Higher income – Quebec City, Quebec
January 30, 10:30 a.m. ATL	Low/Middle income – Moncton, New Brunswick
January 30, 12:30 p.m. ATL	Higher income – Moncton, New Brunswick

The groups lasted approximately 120 minutes, and consisted of between 8 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 screened to ensure they were invited to the appropriate session according to household income. 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). All participants were offered a $100 honorarium to encourage participation and thank them for their 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 were asked to consent to such recording.

Moderation

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

- Rick Nadeau, Senior Associate, moderated all sessions in Montreal, Quebec City and Moncton.
- Derek Leebosh, Vice President, Environics, moderated all remaining sessions.

All qualitative research work was conducted in accordance with the professional standards established by the Marketing Research and Intelligence Association (MRIA) and applicable PIPEDA legislation.

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 economic issues and their expectations about the role of the Government of Canada in the economy.

Use of research: By gauging and analyzing 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 1,007 adult residents of Canada, from February 10-28, 2016. A survey of this size will yield results which can be considered accurate to within +/- 3.1 percentage points, 19 times out of 20. Margins of error are larger for subgroups of the population.

Sample design and weighting

The survey targeted adult Canadians (187 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.

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%)	102	+/- 9.7
Quebec	(24%)	250	+/- 6.2
Ontario	(38%)	300	+/- 5.7
Prairies/NWT/Nunavut	(17%)	204	+/- 6.9
B.C./Yukon	(13%)	151	+/- 8.0
CANADA	(100%)	1,007	+/- 3.1

* 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 in consultation with Finance Canada representatives and incorporated tracking questions from previous economic surveys.

Environics reviewed the questionnaire to ensure appropriate design, and identify any programming or analysis issues, providing suggestions and guidance on the survey instrument. Both the English and French versions of the final study questionnaire are included in Appendix E. The questionnaire averaged 15 minutes to deliver.

Pretest

An initial pretest of 10 interviews in English was conducted on February 10, 2015 and audited live by Environics and Government of Canada staff. These interviews included standard GC pretest probing questions. No changes were required. The English survey proceeded on February 11.

A French pretest was conducted on February 11; 10 interviews were completed. A number of pretest interviews were recorded and made available to the Government.

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 ten percent of each interviewer's work was unobtrusively monitored for quality control in accordance with the standards set out by the Marketing Research and Intelligence Association (MRIA).

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 charity 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). The survey was registered with the MRIA's research registration system, which permits the public to verify a survey call, inform themselves about the industry and/or register a complaint.

Completion results

The sample for this survey consisted of 1,007 interviews with adult Canadians. The effective response rate for the survey is 10 percent.[2] This is calculated as the number of responding participants (completed interviews 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

	TOTAL	Landline	Cell
Total Numbers Attempted	**12091**	**4876**	**7215**
Out-of-scope - Invalid	**119**	**25**	**94**
Unresolved (U)	**5174**	**1966**	**3208**
No answer/Answering machine	5174	1966	3208
In-scope - Non-responding (IS)	**2211**	**829**	**1382**
Language barrier	211	102	109
Incapable of completing (ill/deceased)	77	42	35
Callback (Respondent not available)	1923	685	1238
Total Asked	**4587**	**2056**	**2531**
Refusal	3155	1318	1837
Termination	243	123	120
In-scope - Responding units (R)	**1189**	**615**	**574**
Completed Interview	1007	553	454
NQ - Quota Full	182	62	120
Response Rate	**9.93**	**12.68**	**8.06**
Incidence	**84.69**	**89.92**	**79.09**
Survey Length	**15.18**	**15.08**	**15.31**

2This response rate calculation is based on a formula developed by MRIA in consultation with the Government of Canada (Public Works and Government Services).

Non-response bias analysis

The table below presents a profile of the final sample, compared to the actual population of Canada (2011 Census information). As is typically the case for general population telephone surveys, older individuals are easier to reach, so the survey overrepresented those age 55+ (this was corrected with age weighting). The final sample also somewhat underrepresents those with high school or less education, which is a typical pattern for telephone surveys in Canada (e.g., individuals with more education are more likely to respond to telephone surveys).

Sample profile

	Sample*	Canada
Gender (18+)		
Male	50	48
Female	50	52
Age		
18-34	29	28
35-54	28	37
55+	43	36
Education level ᵅ		
High school diploma or less	30	40
Trades/college/post sec no degree	38	32
University degree	33	28

* Data are unweighted and percentage on those giving a response to each demographic question
ᵅ 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 (English and French)

January 21, 2016

Focus Groups on Canada's Economy – Winter 2016
Finance Canada
PN8806

1. Introduction to Procedures (10 minutes)

Welcome to the focus group. 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 a lot of 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. There are some observers watching the session on the other side of the two way mirror and they are part of the research team.

We are also video-taping 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 take some notes during the group to remind myself of things also. Anything you say here will remain confidential and anonymous and any comments you make will not be linked to you by name in any reporting we do on this project.

I should also mention that I work for a public opinion research company. I do not work for the Government of Canada which is the client that commissioned the research.

The host/hostess will pay you your incentives at the end of the session.

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, such as what kind of work you do if you work outside the home and who lives with you in your house.

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

Before we get into the main topic of our focus group tonight, I want to start with a fairly broad question. Could you each write down your answer to the following question - Thinking of the all issues facing Canada today which **one** would you say the Government of Canada (that is the federal government) should focus on most? (NB: Keep in mind that there are issues that are municipal, provincial or federal government issues – please focus on FEDERAL issues)

PARTICIPANTS TO READ WHAT ISSUES THEY CAME UP WITH

What makes you say that?

PROBE IF NOT MENTIONED: What about the economy?

3. Economy – initial word association exercise (10 minutes)

I have an exercise I would like to do with you now. We are going to be discussing Canada's economy for the remainder of the sessions. Before we do that I am going to hand you a sheet with some words (a "word cloud") that might be used to describe Canada's economy. I would like you to take a look and circle the one word on the page that for you best captures/describes your feeling of the current state of the Canadian economy.

HAND OUT WORD CLOUD

AFTER PARTICIPANTS HAVE CIRCLED WORDS GO AROUND THE TABLE AND WRITE ON A FLIP CHART

Why did you choose that word? DISCUSS

4. Economy – general perceptions (30 minutes)

What do you think are Canada's biggest economic strengths? What do we have that we can rely on or that other countries don't have?

What are the biggest threats to Canada's economy these days?

How do you think Canada's economy is doing compared to other countries? Are we now doing better or worse than other countries like the U.S. or in Europe? Or are we about the same?

Why do you think Canada's economy is doing better/worse than other countries?

PROBE: Impact of falling oil prices? Government policies?

IF THEY THINK THE ECONOMY IS NOT DOING WELL: Do you think the economy is going to get worse before it gets better or have things bottomed out?

Are you worried that the Canadian economy may yet suffer a significant downturn over the next 12 months?

What about the economy here in [NAME OF LOCATION]? How is it here compared to the rest of Canada? What is the biggest local economic concern?

LOCAL PROBES:

- **CALGARY:** What about the state of the oil and gas sector here?
- **LONDON**: How is manufacturing these days?
- **TORONTO**: Are you concerned about housing affordability in Toronto?
- **VANCOUVER**: What do you think about the cost of living?
- **MONTREAL**: What do you think about the existing public infrastructure? Is enough being done to address aging roads and bridges?
- **QUEBEC**: Local economy…
- **MONCTON**: How do you feel about your future prospects in New Brunswick? What do you think it will take to help people find good jobs and stay here?

To what extent does the state of Canada's economy affect you personally? Is it all just a story in the news or do any of you actually feel it personally when the economy is doing better or worse? How so?

How do you feel about each of the following and how do they affect you?

- Canadian dollar: Is it a good thing or a bad thing for the dollar to be lower? Is the low dollar affecting you personally? How so?
- Price of gas: Have gas prices fallen along with world oil prices? Does this affect you? How so?
- Interest and mortgage rates: Do you think current interest and mortgage rates are a good thing or a bad thing? Do they affect you? How so?
- Job security: Do you feel that your own job is more or less secure these days? What about the jobs of those around you, such as family, friends, or neighbours?
- The stock market: Is the decline in stocks affecting you?

- What about the cost of living?

5. Federal government action on the economy (30 minutes)

Is the state of Canada's economy mainly affected by world conditions or is it affected by decisions made by our own government?

What can the federal government do to help the economy, if anything?
What action would you like to see the federal government take to boost the economy?

Does the government need to "kick start" the economy? What does that mean to you?

What does it mean to you when you hear of there being a "stimulus" to the economy?

What word best describes what you want from the government in dealing with the current economic situation?

Kick-start? Shock absorber? Stimulus? Reimagine? Revitalize? Modernize? Grow? Accelerate? Restructure? Any other word?

When you hear the term "infrastructure", what does it mean to you?

Some say it would be better for the government to take more of a "hands off" approach and just stay the course and try to keep the budget balanced and not have any new spending.

Other people say it would be better for government to take a more "hands on" approach, to address the economic problems that could involve more spending to stimulate the economy.

What do you think? Should the Government of Canada be more "hands on" or "hands off"? What does this mean to you and why?

IF "HANDS ON":

- Do you think the federal government should spend money to stimulate the economy in the short term, even if this means running a deficit?

IF YES:

- Do you think it should be a small or a large deficit?
- Should the federal government focus more on measures that address the overall economy such as infrastructure spending or should it focus more on measures targeted at helping individual Canadians or families?

IF THEY SAY INFRASTRUCTURE SPENDING:

- What kind of infrastructure spending? PROMPT AS NECESSARY: roads and public transit? Anything else?

IF THEY SAY TARGETED MEASURES:

- What kind of measures?

PROMPT AS NECESSARY: what about an improved Family Tax Credit? (IF YES: what would an improved version look like)? A new Canada Child Benefit (IF YES: what would this new benefit look like)? Higher CPP benefits? Anything else?

Does the Canadian economy require a major "restructuring" for future growth or are minor tweaks enough? What would a "major restructuring" mean to you?

Does the Canadian economy need to be "diversified" or is it already "diversified"? What does "diversified" mean to you?

What does "green investment" mean to you?

PROMPT AS NECESSARY: e.g. an environmental commitment? Upgrading buildings to make them more energy efficient? Investing in solar and wind energy?

6. Federal budget (30 minutes)

The government will soon table its budget. What do you think are the government's biggest challenges in putting together a budget right now?

PROBE: Deficit? Growing need for program spending? How to get the economy going?

What have you heard about the federal government's fiscal situation? Is the government facing a deficit? IF YES: Do you think the deficit be large or small?

In fact, some people say the deficit this year will be about $10 billion. What is your reaction to that? Does it affect you personally?

What if I told you that the deficit would be about 3% of the budget?

What do you think is a reasonable timeframe to get eliminate the deficit? This year? In the next couple of years? No set deadline, as long as it takes?

7. Conclusion (10 minutes)

We have covered a lot of 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. To conclude, I wanted to ask you whether you have any last thoughts that you want to give the Government of Canada about today's topic.

THANK YOU FOR PARTICIPATING!

Le 25 janvier 2016

Groupes de discussion sur l'économie du Canada – Hiver 2016
Finances Canada
PN8806

1. Introduction à la procédure (10 minutes)

Bienvenue au groupe de discussion. Nous voulons entendre vos opinions. Sentez-vous libre d'être d'accord ou non. Même si vous êtes la seule personne sur dix à exprimer un certain point de vue, vous pouvez représenter un tas de gens qui partagent votre opinion.

Vous n'avez pas à m'adresser tous vos commentaires. Vous pouvez aussi échanger des idées et des arguments les uns avec les autres. Des observateurs, qui font partie de l'équipe de recherche, assistent à la séance de l'autre côté de la glace d'observation.

Nous enregistrons aussi la séance sur vidéo pour m'aider à rédiger mon rapport. La vidéo ne sera utilisée qu'à l'interne pour analyser la recherche et ne sera remise à personne d'autre. Il se peut que je prenne des notes au cours de la discussion pour me rappeler de certaines choses. Tout ce que vous direz ici restera confidentiel et anonyme et vos commentaires ne seront pas attribués nommément dans nos comptes rendus du projet.

Je devrais aussi mentionner que je travaille pour une société de sondage d'opinion publique. Je ne travaille pas pour le gouvernement du Canada, qui a commandé la recherche.

L'hôte/hôtesse vous versera votre cachet à la fin de la séance.

Faisons un tour de table pour vous permettre de vous présenter. Dites-nous votre nom et parlez-nous un peu de vous, comme le genre de travail que vous faites si vous travaillez à l'extérieur de la maison et qui habite avec vous.

2. Réchauffement – Contexte général (5 minutes)

Avant d'aborder le sujet principal de notre groupe de discussion ce soir, je veux commencer par une question assez vaste. Pouvez-vous chacun noter votre réponse à la question suivante – Parmi toutes les questions qu'affronte le Canada aujourd'hui, **laquelle** devrait le plus retenir l'attention du gouvernement du Canada (c'est—dire du gouvernement fédéral) ? (NB : Gardez à l'esprit qu'il y a des questions d'ordre municipal, provincial ou fédéral – concentrez-vous sur les questions d'ordre FÉDÉRAL)

LES PARTICIPANTS LES QUESTIONS QU'ILS ONT NOTÉES

Qu'est-ce qui vous fait dire cela ?

EXPLORER SI CE N'EST PAS MENTIONNÉ : Et l'économie ?

3. Économie – Exercice d'association de mots (10 minutes)

Je vais maintenant vous proposer un exercice. Nous discuterons de l'économie du Canada durant le reste de la séance. Avant, je vous remettrai une feuille de mots (un « nuage de mots ») qui pourraient servir à décrire l'économie du Canada. Jetez un coup d'œil et encerclez le mot qui vous paraît le mieux décrire l'état de l'économie canadienne.

DISTRIBUER LE NUAGE DE MOTS… APRÈS QUE LES PARTICIPANTS AURONT ENCERCLÉ LES MOTS, FAIRE LE TOUR DE LA TABLE ET ÉCRIRE SUR UN TABLEAU-PAPIER

Pourquoi avez-vous choisi ce mot ? DISCUTER

4. L'économie – perceptions générales (30 minutes)

Quelles sont, selon vous, les plus grandes forces économiques du Canada ? Sur quoi pouvons-nous compter que ne possèdent pas les autres pays ?

Quelles sont les plus grandes menaces qui pèsent sur l'économie du Canada ces jours-ci ?

Comment se comporte l'économie du Canada en comparaison de celle des autres pays, pensez-vous ? Est-elle en meilleur ou en plus mauvais état que celle d'autres pays comme les États-Unis ou l'Europe ? Ou est-elle plus ou moins dans le même état ?

Pourquoi pensez-vous que l'économie du Canada est en meilleur/moins bon état que celle d'autres pays ?

EXPLORER : L'effet de la chute des prix du pétrole ? Des politiques du gouvernement ?

S'ILS CROIENT QUE L'ÉCONOMIE NE VA PAS BIEN : Croyez-vous que l'économie va empirer avant de s'améliorer ou a-t-elle atteint son point le plus bas ?

Craignez-vous que l'économie canadienne tombe en récession au cours des 12 prochains mois ?

Et l'économie locale ? Comment se compare-t-elle à celle du reste du Canada ? Quel est le plus grand sujet d'inquiétude pour l'économie locale ?

EXPLORATIONS LOCALES :

- **MONTRÉAL** : Que pensez-vous de l'état des infrastructures publiques ? En fait-on assez pour remettre en état les routes et les ponts vieillissants ?

- **QUÉBEC** : L'économie locale…

- **MONCTON** : Que pensez-vous des perspectives au Nouveau-Brunswick ? Que faudra-t-il, selon vous, pour aider les gens à trouver des emplois et à rester ici ?

Dans quelle mesure l'état de l'ensemble de l'économie canadienne vous affecte-t-il personnellement ? N'est-ce qu'une nouvelle parmi d'autres ou le ressentez-vous personnellement lorsque l'économie s'améliorer ou se détériore ? Comment ?

Que pensez-vous de chacun des sujets suivants et comment vous affectent-ils ?

- Le dollar canadien : Est-ce bon ou mauvais que le dollar perde de sa valeur ? La faiblesse du dollar vous affecte-t-elle personnellement ? Comment ?

- Prix de l'essence : Le prix de l'essence a-t-il suivi la chute mondiale des prix du pétrole ? Cela vous affecte-t-il ? Comment ?

- Taux d'intérêt hypothécaire : Croyez-vous que les taux actuels d'intérêt hypothécaire sont bons ou mauvais ? Vous affectent-ils ? Comment ?

- Sécurité d'emploi : Estimez-vous que votre emploi est plus ou moins assuré ces jours-ci ? Et les emplois de ceux qui vous entourent, comme les membres de votre famille, vos amis ou vos voisins ?

- Le marché boursier : Le déclin des titres boursiers vous affecte-t-il ?

- Et le coût de la vie en général ?

5. Intervention du gouvernement fédéral dans l'économie (30 minutes)

L'état de l'économie canadienne est-il affecté principalement par les conditions mondiales ou par les décisions de notre gouvernement ?

Que peut faire le gouvernement fédéral pour aider l'économie ?

Quelle mesure aimeriez-vous que le gouvernement fédéral prenne pour stimuler l'économie ?

Le gouvernement a-t-il besoin de relancer l'économie ? Qu'est-ce que ça veut dire pour vous ?

Qu'est-ce que ça signifie pour vous lorsque vous entendez parler de « stimulant » à l'économie ?

Quel mot décrit le mieux ce que vous attendez du gouvernement fédéral pour remédier à la

situation économique ?

EXPLORER : Relancer ? Amortisseur ? Stimulant ? Réimaginer ? Revitaliser ? Moderniser ? Croître ? Accélérer ? Restructurer ?

Lorsque vous entendez le terme « infrastructure », que signifie-t-il pour vous ?

Les uns disent qu'il vaudrait mieux que le gouvernement fédéral soit moins interventionniste, qu'il garde le cap et essaie d'équilibrer le budget sans engager de nouvelles dépenses. D'autres disent que le gouvernement devrait être plus interventionniste et dépenser davantage pour stimuler l'économie. Qu'en pensez-vous ? Le gouvernement du Canada devrait-il être plus ou moins interventionniste ? Qu'est-ce que ça veut dire pour vous et pourquoi ?

SI INTERVENTIONNISTE : Croyez-vous que le gouvernement fédéral devrait dépenser pour stimuler l'économie à court terme, même si cela suppose d'encourir un déficit ?

SI OUI : Croyez-vous que ce devrait être un petit ou un gros déficit ? Qu'est-ce que « petit » ou « gros » ?

Le gouvernement fédéral devrait-il se concentrer davantage sur des mesures destinées à l'ensemble de l'économie, comme les dépenses d'infrastructure, ou des mesures ciblées pour aider les particuliers ou les familles ?

- **S'ILS DISENT DES DÉPENSES D'INFRASTRUCTURE, EXPLORER** : Quelle sorte de dépenses d'infrastructure ? **SUGGÉRER AU BESOIN** : Routes et transport en commun ? Autre (i.e. rail, pipelines installations communautaires, traitement des eaux d'égout, etc.)?

- **S'ILS DISENT DES MESURES CIBLÉES, EXPLORER** : Quelle sorte de mesures ciblées ?

  SUGGÉRER AU BESOIN : Et un régime amélioré de régime de Crédit d'impôt à la famille ? (SI OUI : quel serait ce régime amélioré) ? Un nouveau régime des Prestations fiscales pour enfants (SI OUI : de quoi aurait l'air ce nouveau régime) ? Hausse des prestations du RPC ? Autre ?

L'économie canadienne requiert-elle une « restructuration » majeure pour sa croissance future ou de petites modifications suffiraient-elles ? Que signifie une « restructuration majeure » pour vous ?

L'économie canadienne a-t-elle besoin d'être « diversifiée » ou est-elle déjà « diversifiée » ? Que signifie « diversifiée » pour vous ?

Lorsque vous entendez parler « d'investissement vert », qu'est-ce que ça veut dire pour vous ?

SUGGÉRER AU BESOIN : Un engagement environnemental ? La modernisation des immeubles pour améliorer leur efficacité énergétique ? Investir dans l'énergie éolienne et solaire ?

6. Budget fédéral (30 minutes)

Le gouvernement déposera bientôt son budget. Quels sont les plus grands défis du gouvernement dans l'élaboration de ce budget, selon vous ?

EXPLORER : Déficit ? Besoin croissant de dépenses de programme ? Comment remettre l'économie en marche ?

Qu'avez-vous entendu dire à propos de la situation fiscale du gouvernement fédéral ? Le gouvernement fait-il face à un déficit ? **SI OUI :** Croyez-vous que le déficit sera gros ou petit ?

Certains disent que le déficit atteindra cette année environ 10 milliards de dollars. Comment réagissez-vous à cela ? Est-ce que cela vous affecte personnellement ?

Et si je vous disais que le déficit représenterait environ 3 % du budget ?

Quelle serait, selon vous, une échéance raisonnable pour supprimer le déficit ?

> **EXPLORER** : Cette année ? D'ici deux ou trois ans ? Aucune échéance fixe, le temps qu'il faudra ?

7. Conclusion (10 minutes)

Nous avons couvert un tas de sujets aujourd'hui et nous apprécions vraiment que vous ayez pris le temps de venir nous faire part de vos opinions. Votre opinion est très importante et pertinente. Pour conclure, je voulais vous demander si vous avez d'autres suggestions à faire au gouvernement du Canada à propos du sujet d'aujourd'hui.

MERCI DE VOTRE PARTICIPATION !

Appendix D: Recruitment screener (English and French)

January 20, 2016

Environics Research Group Limited
Focus Groups on Canada's Economy
Finance Canada
19420 – Finance Canada
Recruitment for Group Discussion

Respondent Name: _____

Home #: _____

Business #: _____

Group #: _____ Recruiter: _____

GROUP 1
Toronto
Monday, January 25th
5:30 pm
Low/middle income

GROUP 2
Toronto
Monday, January 25th
8:00 pm
High income

GROUP 3
London
Tuesday, January 26th
5:30 pm
Low/middle income

GROUP 4
London
Tuesday, January 26th
7:30 pm
High income

GROUP 5
Calgary
Wed. January 27th
5:30 pm
Low/middle income

GROUP 6
Calgary
Wed. January 27th
7:30 pm
High income

GROUP 7
Montreal (French)
Wed. January 27th
5:30 pm
Low/middle income

GROUP 8
Montreal (French)
Wed. January 27th
7:30 pm
High income

GROUP 9
Vancouver
Thurs. January 28th
5:30 pm
Low/middle income

GROUP 10
Vancouver
Thurs. January 27th
7:30 pm
High income

GROUP 11
Quebec City (FR)
Thurs. January 28th
5:30 pm
Low/middle income

GROUP 12
Quebec City (FR)
Thurs. January 27th
7:30 pm
High income

GROUP 13
Moncton (FR)
Saturday, January 30th
10:30 am
Low/middle income

GROUP 14
Moncton (ENG)
Saturday, January 30th
12:30 pm
High income

10 recruits per session.

- **"High income" is defined as anyone with a personal annual income of over $80,000 or anyone in a household with multiple incomes with an annual household income of over $100,000. In Quebec city and Moncton, a household income of over $80,000 also counts as "high income"**

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. An audio 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 2 hours 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:

	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 2015?**
   READ

01 - Under $30,000	**GROUPS 1, 3, 5, 7, 9, 11 or 13**
02 - $30,000 to $60,000	**GROUPS 1, 3, 5, 7, 9, 11 or 13**
03 - $60,000 to $80,000	**GROUPS 1, 3, 5, 7, 9, 12 or 14**
04 - $80,000 to $100,000	**GROUPS 2, 4, 6, 8, 10, 12 or 14**
05 - $100,000 to $150,000	**GROUPS 2, 4, 6, 8, 10, 12 or 14**
06 - $150,000 and over	**GROUPS 2, 4, 6, 8, 10, 12 or 14**
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 2015?**

READ

01 - Under $30,000	**GROUPS 1, 3, 5, 7, 9, 11 or 13**
02 - $30,000 to $60,000	**GROUPS 1, 3, 5, 7, 9, 11 or 13**
03 - $60,000 to $80,000	**GROUPS 1, 3, 5, 7, 9, 11 or 13**
04 - $80,000 to $100,000	**GROUPS 1, 3, 5, 7, 9, 12 and 14**
05 - $100,000 to $150,000	**GROUPS 2, 4, 6, 8, 10, 12 and 14**
06 - $150,000 and over	**GROUPS 2, 4, 6, 8, 10, 12 and 14**
99 - REFUSE/DK/NA	**TERMINATE**

NB: IN QUEBEC CITY AND MONCTON THE HIGHER INCOMES CUT OFFS ARE LOWER ($80k instead of $100k) THAN IN THE OTHER CITIES

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.....0	**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.....7	**TERMINATE**

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

Some High School only.....1
Completed High School.....2
Trade School certificate.....3 **GET MIX**
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 max.
Homemaker	( )	1 max.
Student	( )	1 max. **GROUPS 1, 3, 5, 7, 9, 11, 13 ONLY**
Retired	( )	2 max.
Unemployed	( )|	1 max. **GROUPS 1, 3, 5, 7, 9, 11, 13 ONLY**

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 RLEATES TO EXCLUSIONS IN Q. 1

10. What is your ethnic background?

IN TORONTO, VANCOUVER, CALGARY, MONTREAL Recruit at least two per group who are of non-European descent or who are other visible minorities (i.e. Chinese or South Asian, but could include aboriginal people or Afro-Canadians as well).

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- **MIN 5 PER GROUP**
Fairly comfortable...2
Not very comfortable.3|- **TERMINATE**
Very uncomfortable...4|- **TERMINATE**

12. Have you <u>ever</u> 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.15)**

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. 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

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.

16. 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
No.....2 **TERMINATE**

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

Yes.....1
No.....2 **TERMINATE**

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

IMPORTANT: The session is 2 hours 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 2 hours in total and you will receive **$100** to thank you for your participation.

Locations:

Toronto – Monday, January 25th (5:30-7:30 and 8-10pm)
Research House
1867 Yonge Street, 2nd Floor
416.488.2328

London – Tuesday, January 26th (5:30-7:30 and 7:30-9:30pm)
Insights
546 Adelaide Street North
519.679.0110

Calgary – Wednesday, January 27th (5:30-7:30 and 7:30-9:30pm)
Qualitative Coordination
707 10th Avenue SW, Suite 120
403.229.3500

Montreal – Wednesday, January 27th (5:30-7:30 and 7:30-9:30pm)
Léger Marketing
507 Place D'Armes, Suite 700
514.982.2464

Vancouver – Thursday, January 28th (5:30-7:30 and 7:30-9:30pm)
Vancouver Focus (JMI)
503-1080 Howe Street
604.682-4292

Quebec City - Thursday, January 28th (5:30-7:30 and 7:30-9:30pm)
Léger Marketing
580 Grande-Allée Est, Suite 580
418.522.7467

Moncton – Saturday January 30th (10:30-12:30 and 12:30-2:30pm)
Corporate Research Associates
68 Highfield Street, Suite 101
888.414.1336

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.

Environics Research Group Limited
Groupes de discussion sur l'économie du Canada
19420 - Finance Canada
Recrutement pour les groupes de discussion

Nom du répondant : _____

N° de téléphone résidentiel : _____

N° de téléphone d'affaires : _____

Groupe n°: _____

Recruteur: _____

GROUPE 7
Montréal (Français)

Mercredi, le 27 janvier
17h30
Faible/moyen revenu

GROUPE 8
Montréal (Français)

Mercredi, le 27 janvier
19h30
Revenu élevé

GROUPE 11
Ville de Québec (FR)

Jeudi, le 28 janvier
17h30
Faible/moyen revenu

GROUPE 12
Ville de Québec (FR)

Jeudi, le 28 janvier
19h30
Revenu élevé

GROUPE 13
Moncton (FR)

Samedi, le 30 janvier
10h30
Faible/moyen revenu

10 recrutés par session.

- **"Revenu élevé" est défini comme toute personne ayant un revenu annuel personnel de plus de 80 000 $ ou toute personne dans un foyer avec des revenus multiples avec un revenu annuel du foyer de plus de 100 000 $. Dans la ville de Québec et de Moncton, un revenu du foyer de plus de 80 000 $ compte aussi comme "revenu élevé".**

Bonjour, mon nom est _____ de Environics Research. Nous téléphonons aujourd'hui pour inviter des participants à assister à un groupe de discussion que nous menons actuellement de la part du Gouvernement du Canada pour examiner les questions autour de l'état actuel de l'économie canadienne. Cette étude est un projet de recherche, pas une tentative de vendre ou de commercialiser quoi que ce soit. Votre participation à la recherche est entièrement volontaire, confidentiel et votre décision d'y participer ou non n'affectera en rien les interactions que vous pourriez avoir avec le gouvernement.

Le format est une discussion "table ronde" mené par un professionnel de la recherche. Une bande audio de la session sera produite à des fins de recherche. Les bandes ne seront utilisées que par le professionnel de la recherche pour aider à préparer le rapport sur les

résultats de la recherche et seront détruites une fois le rapport terminé. Toute information recueillie, utilisée et/ou dévoilée sera utilisée qu'à des fins de recherche seulement et sera traitée conformément aux exigences de la Loi sur la protection des renseignements personnels.

La session durera un maximum de 2 heures et vous recevrez une somme en argent comptant en guise de remerciement pour assister à la session. Est-ce que vous nous permettez de vous poser quelques questions additionnelles, à vous ou à quelqu'un d'autre dans votre foyer, afin de voir si vous qualifiez pour notre étude? Ceci prendra environ 5 minutes.

NB: Si un participant demande des informations sur la firme de recherche qui mène l'étude, vous pouvez leur dire: Environics Research est situé au 33, rue Bloor Est, bureau 900, Toronto Ontario et peuvent être rejoint au 416-920-9010.

Oui.....1 – CONTINUER
Non.....2 – REMERCIER ET TERMINER

1 Est-ce que vous, une personne de votre foyer ou de votre famille immédiate travaillez pour:

	Non	Oui
Une firme d'étude de marché, de communications ou de relations publiques ou une agence de publicité	**( )**	**( )**
Un média (radio, télévision, journaux, revues, etc.)	**( )**	**( )**
Un ministère ou un organisme du gouvernement fédéral	**( )**	**( )**
Un parti politique	**( )**	**( )**

SI OUI À L'UN CI-DESSUS – REMERCIER ET TERMINER

18. INDIQUER:

Homme	1	répartition 50/50
Femme	2	

19. Combien de personnes, y compris vous-même, vivent dans votre foyer?

Une	**POSER LA Q. 4**
Deux	**PASSER À LA Q. 5**
Trois	**PASSER À LA Q. 5**
Quatre ou plus	**PASSER À LA Q. 5**

SI SEULEMENT UNE PERSONNE DANS LE FOYER, DEMANDER:

20. Laquelle des catégories suivantes corresponds le mieux à votre revenu annuel personnel total, avant impôt, pour 2015? LIRE

01 – Moins de 30 000 $	**GROUPES 7, 11 ou 13**
02 – 30 000 $ à 60 000 $	**GROUPES 7, 11 ou 13**
03 – 60 000 $ à 80 000 $	**GROUPE 7 ou 12**
04 – 80 000 $ à 100 000 $	**GROUPES 8 ou 12**
05 – 100 000 $ à 150 000 $	**GROUPES 8 ou 12**
06 – 150 000 $ et plus	**GROUPES 8 ou 12**
99 – REFUS/NSP/PR	**TERMINER**

DEMANDER À TOUS LES FOYERS AVEC PLUS D'UNE PERSONNE

21. Laquelle des catégories suivantes corresponds au revenu annuel <u>total</u>, avant impôt, de <u>tous les membres</u> de votre foyer, pour 2015? LIRE

01 – Moins de 30 000 $	**GROUPES 7, 11 ou 13**
02 – 30 000 $ à 60 000 $	**GROUPES 7, 11 ou 13**
03 – 60 000 $ à 80 000 $	**GROUPES 7, 11 ou 13**
04 – 80 000 $ à 100 000 $	**GROUPES 7 ou 12**
05 – 100 000 $ à 150 000 $	**GROUPES 8 ou 12**
06 – 150 000 $ et plus	**GROUPES 8 ou 12**
99 – REFUS/NSP/PR	**TERMINER**

NB: À QUÉBEC ET MONCTON LE SEUIL DES REVENUS PLUS ÉLEVÉS SONT MOINDRE (80 000 $ au lieu de 100 000 $) QUE DANS LES AUTRES VILLES.

DEMANDER À TOUS

22. On nous a demandé de parler avec des participants de différentes catégories d'âges. Pour pouvoir le faire de façon efficace, je vous demanderais de bien vouloir me donner votre âge exacte s.v.p.?

_____. INSCRIRE

Moins de 18 ans.....1	**TERMINER**
18-24 ans.....2	
25-34 ans.....3	
35-44 ans.....4	**OBTENIR UN MIXTE**
45-54 ans.....5	
65.74 ans.....6	
65-74 ans.....7	
75 ans ou plus.....8	**TERMINER**

23. Pourriez-vous me dire quel est le dernier niveau de scolarité que vous avez terminé?

Secondaire non terminé seulement….1	
Secondaire terminé.....2	
Certificat d'une école de métier……3	**OBTENIR UN MIXTE**
Post-secondaire non terminé.....4	
Post-secondaire terminé.....5	
Diplôme universitaire.....6	

24. Travaillez-vous (VÉRIFIER LES QUOTAS)

Temps plein (35 hrs +)	( )|	4 minimum
Temps partiel (moins de 35 hrs)	( )	2 max.
Personne au foyer	( )	1 max.
Étudiant	( )	1 max. **GROUPES 7, 11, 13**
Retraité	( )	2 max.
Sans emploi	( )|	1 max. **GROUPES 7, 11, 13**

25. Quelle est votre occupation actuelle?

_____ _____
Type d'emploi **Type d'entreprise**

SI MARIÉ(E) DEMANDER: QUELLE EST L'OCCUPATION DE VOTRE CONJOINT(E)?

_____ _____
Type d'emploi **Type d'entreprise**

TERMINER SI L'OCCUPATION EST LIÉE AUX EXCLUSIONS À LA Q. 1

26. Quelle est votre origine ethnique?

À MONTRÉAL, recruter au moins deux par groupe qui sont d'origine non-européenne ou qui sont d'autres minorités visibles (par ex. chinoise ou Asie du Sud, mais pourrait inclure aussi des personnes autochtones ou afro-canadiens).

27. On demande aux personnes qui participent à des groupes de discussion d'émettre leurs opinions et commentaires. Dans quelle mesure vous sentez-vous à l'aise d'émettre vos opinions devant d'autres personnes? Vous sentez-vous….(lire la liste)

Très à l'aise.....1- **MIN 5 PAR GROUPE**
Assez à l'aise.....2
Pas très à l'aise.....3|- **TERMINER**
Très mal à l'aise.....4|- **TERMINER**

28. Avez-vous déjà participé à un groupe de discussion ou à un entretien face-à-face où l'on vous a remis une somme d'argent, ici ou ailleurs?

Oui 1 **MAXIMUM 5 PAR GROUPE**
Non 2 ---> **(PASSER À LA Q.15)**

SI OUI, DEMANDER

29. À quand remonte la dernière fois que vous avez participé à une de ces discussions?

_____

(TERMINER SI AU COURS DES 6 DERNIERS MOIS)

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

_____

(PRÉCISER)

SI PLUS DE 5 – TERMINER

31. On demande parfois aux participants d'écrire leurs réponses sur un questionnaire. Y a-t-il une raison quelconque pour laquelle vous ne pourriez pas participer? Si vous avez besoin de lunettes pour lire, veuillez les apporter avec vous. (Ajouter déficience auditive)

Oui.....1 - TERMINER
Non.....2

NOTE: TERMINER SI LE RÉPONDANT DIT QU'IL A UN PROBLÈME DE VUE OU D'AUDITION, UN PROBLÈME DE LANGUE ÉCRITE OU VERBALE, UNE INQUIÉTUDE À NE PAS POUVOIR COMMUNIQUER EFFICACEMENT.

32. J'aimerais vous inviter à participer à une session d'un groupe de discussion où vous pourrez échanger vos opinions dans une discussion animée avec les autres canadiens de votre communauté. La session sera enregistrée et observée, mais votre participation sera confidentielle. Acceptez-vous de participer au groupe de discussion?

Oui..... 1
Non..... 2 – TERMINER

33. Nous vous contacterons à nouveau avant la date de la session pour confirmer votre présence. Êtes-vous d'accord avec cela?

Oui..... 1
Non..... 2 – TERMINER

INTERVIEWEUR DIRE AU RÉPONDANT : VEUILLEZ APPORTER AVEC VOUS UNE PIÈCE D'IDENTITÉ AVEC PHOTO QUI POURRAIT VOUS ÊTRE DEMANDÉ SUR PLACE.

IMPORTANT:
La session durera 2 heures, mais nous demandons aux participants d'arriver 15 minutes avant le début de la session.

Est-il possible pour vous d'être présent à la salle de recherche 15 minutes avant le début de la session?

Oui..... 1 – CONTINUER
Non..... 2 – TERMINER

J'aimerais vous inviter à un groupe de discussion qui aura lieu____. La session durera 2 heures au total et vous recevrez **100 $** en guise de remerciement pour votre participation.

GROUPE 7
Montréal (Français)
Mercredi, le 27 janvier
17h30
Faible/moyen revenu

GROUPE 8
Montréal (Français)
Mercredi, le 27 janvier
19h30
Revenu élevé

GROUPE 11
Ville de Québec (FR)
Jeudi, le 28 janvier
17h30
Faible/moyen revenu

GROUPE 12
Ville de Québec (FR)
Jeudi, le 28 janvier
19h30
Revenu élevé

GROUPE 13
Moncton (FR)
Samedi, le 30 janvier
10h30
Faible/moyen revenu

Lieu:

Montréal – Mercredi, le 27 janvier (17h30-19h30 et 19h30-21h30)
Léger Marketing
507 Place D'Armes, Bureau 700
514.982.2464

Ville de Québec – Jeudi, le 28 janvier (17h30-19h30 et 19h30-21h30)
Léger Marketing
580 Grande-Allée Est, Bureau 580
418.522.7467

Moncton – Samedi, le 30 janvier (10h30-12h30 et 12h30-14h30)
Corporate Research Associates
68 rue Highfield, Bureau 101
888.414.1336

INTERVIEWERS: Veuillez dire au répondant que les groupes sont petits et que toute personne qui ne se présente pas ou qui annule à la dernière minute compromettront le projet. Assurez-vous qu'ils savent que leurs opinions sont importantes pour nous et que nous sommes sérieux de savoir ce qu'ils ont à offrir.

NOTE: VEUILLEZ DIRE AUX RÉPONDANTS QU'ILS RECEVRONT UNE CONFIRMATION PAR TÉLÉPHONE LA JOURNÉE AVANT LE GROUPE. SI POUR UNE RAISON QUELCONQUE ILS N'ONT PAS EU DE NOS NOUVELLES ILS DEVRAIENT NOUS CONTACTER AU _____. SI LEUR NOM N'EST PAS SUR LA LISTE DE PRÉSENCE, ILS NE SERONT PAS ADMIS AU GROUPE DE DISCUSSION. SI UN RÉPONDANT A DES QUESTIONS SUR LA RECHERCHE, ILS DEVRAIENT ÉGALEMENT NOUS CONTACTER À CE NUMÉRO.

Appendix E: Survey questionnaire (English and French)

February 8, 2016

Finance Canada Survey on Attitudes towards Canada's Economy
Environics Research – PN8806

Good afternoon/evening. My name is _____ and I am calling from Environics, a public opinion research company.

CONFIRM WHETHER RESPONDENT PREFERS ENGLISH OR FRENCH

We are conducting a study on behalf of the Government of Canada to find out what people think about issues facing Canada today. Please be assured that we are not selling or soliciting anything. The survey is voluntary and your responses will be kept entirely confidential and anonymous. This survey is registered with the national survey registration system.

[IF ASKED: The survey should take about 15 minutes to complete]
[IF ASKED: The survey is being sponsored by Finance Canada]
[IF ASKED: This survey is registered with the national survey registration system. The registration system has been created by the Canadian survey research industry to allow the public to verify that a survey is legitimate, get information about the survey industry or register a complaint. The registration system's toll-free telephone number is 1-888-602-6742, extension 8728].

IF LANDLINE SAMPLE
We choose telephone numbers at random and then select one person from each household to be interviewed. To do this, we would like to speak to the person in your household, 18 years of age or older, who has had the most recent birthday. Would that be you?

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

MAIN SURVEY

Assessments of Economy

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

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

99 – [DO NOT READ] Don't know/Refused

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

RECORD VERBATIM - [MULTIPLE MENTIONS]

99 – [DO NOT READ] Don't know/Refused

Q2. (T) How would you rate the current state of the Canadian economy? (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	
Not sure	99

[ROTATE ORDER OF QUESTIONS 3 AND 4]

Q3. (T) How would you rate the current state of the United States economy? (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	
Not sure	99

Q4. (T) How would you rate the current state of the [PROVINCE] economy? (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	
Not sure	99

Q5. (T) Over the next six months, do you think the Canadian economy will be stronger, weaker, or will there be no change?
[NOTE TO INTERVIEWER: IF RESPONDENT SAYS "HOPE" IT WILL BE STRONGER, CLARIFY WHAT S/HE ACTUALLY *THINKS* WILL HAPPEN]

Stronger	1
Weaker	2
No change	3
Don't know	99

Moving on…

ROTATE Q6-11 (NOTE THAT Q7 MUST ALWAYS FOLLOW Q6, Q9 MUST ALWAYS FOLLOW Q8, AND Q11 MUST ALWAYS FOLLOW Q10). REPEAT SCALE AS NECESSARY

Q6. For you personally, how would you rate the current value of the Canadian dollar? Please use a scale from 1 to 10, where 1 is very negative for you and 10 is very positive for you.

Very negative	1
	2
	3
	4
	5
	6
	7
	8
	9
Very positive	10

VOLUNTEERED

Doesn't make much difference	97	SKIP TO Q.8
Depends	98	SKIP TO Q.8
Don't know	99	SKIP TO Q.8

Q7. ASK IF CODE 01 to 10 AT Q6: What makes you say that?

RECORD VERBATIM

DK/NA 99

Continued…

Q8. For you personally, how would you rate the current price of gasoline? Please use a scale from 1 to 10, where 1 is very negative for you and 10 is very positive for you.

Very negative	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Very positive	10	
VOLUNTEERED		
Doesn't make much difference	97	SKIP TO Q.10
Depends	98	SKIP TO Q.10
Don't know	99	SKIP TO Q.10

Q9. ASK IF CODE 01 to 10 AT Q8: What makes you say that?

RECORD VERBATIM
DK/NA 99

Q10. For you personally, how would you rate current interest rates? where 1 is very negative for you and 10 is very positive for you.

Very negative	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Very positive	10	
VOLUNTEERED		
Doesn't make much difference	97	SKIP TO Q.12
Depends	98	SKIP TO Q.12
Don't know	99	SKIP TO Q.12

Q11. ASK IF CODE 01 to 10 AT Q10: What makes you say that?

RECORD VERBATIM
DK/NA 99

Personal Financial Situation

Q12. How would you rate your own personal financial situation? 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 know	99

Q13. How concerned are you, if at all, that you or someone in your household may lose their job in the next six months? Please use a scale from 1 to 10, where 1 is not at all concerned and 10 is very concerned.

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

Taxes

Q14. Thinking about the level of taxes that Canadians as a whole pay, compared to the services that are provided by governments, do you feel that Canadians pay too much, about the right amount, or too little in taxes?

Too much	1
About the right amount	2
Too little	3
VOLUNTEERED	
Depends	98
Don't know	99

Q15. ROTATE ORDER OF STATEMENTS:

Some/other people think of taxes as mostly a positive thing, because they are how we pay for important things that make our quality of life good, such as health care, education, and roads.

Some/other people think of taxes as mostly a negative thing, because they take money out of people's pockets and hold back economic growth and the creation of wealth.

Which one of these views is closer to you own?

IF SAY BOTH EQUALLY, PROBE FOR ONE THAT IS CLOSER

Taxes are mostly a positive thing	1
Taxes are mostly a negative thing	2
VOLUNTEERED	
Both equally true	3
Depends	6
Don't know	99

Continued…

Government/Finances

READ: Moving on…

Q16. (T) Based on what you know, what is the current state of federal government finances – is the government… [ROTATE ORDER]:

running an annual *deficit*, meaning they are *spending* more money than they are *receiving*
running an annual *surplus*, meaning they are *receiving* more money than they are *spending*
ALWAYS READ LAST: or are their finances basically in balance?
[REPEAT LIST IF NECESSARY]

Running an annual deficit	1
Running an annual surplus	2
Finances basically in balance	3
Don't know	99

Q17. ROTATE ORDER OF STATEMENTS:

Some/other people say the decisions and actions of the federal government can have a significant impact on the state of the Canadian economy.

Some/other people say that the state of the economy is mainly affected by world conditions and our government has little influence.

Which of these is closer to your own view?

IF SAY BOTH EQUALLY, PROBE FOR ONE THAT IS CLOSER TO THEIR VIEW

Gov't decisions significantly impact economy	1
World conditions mainly impact economy	2
VOLUNTEERED	
Both equally true	3
Depends	6
Don't know	99

Q.18 Next, how much of a priority, if at all, should each of the following be for the Government of Canada? Please use a scale from 1 to 10, where 1 means very low priority and 10 means very high priority. READ AND ROTATE

Creating new jobs
Creating full-time higher paying jobs
Investing in skills and retraining programs so that Canadians have skills to find jobs
Creating jobs for young people
Providing financial support to those who have recently lost their jobs to help them get back on their feet
Providing skills training to those who have recently lost their jobs to help them get back on their feet

REPEAT SCALE AS NEEDED

Very low priority	1
	2
	3
	4
	5
	6
	7
	8
	9
Very high priority	10
Don't know	99

Q.19 Thinking of Canada's economy, how effective, if at all, do you think each of the following policies would be when it comes to growing and improving Canada's economy? Please use a 10-point scale, where 1 means not at all effective and 10 means very effective. READ AND ROTATE…50/50 SPLIT ON EACH ITEM

(split) Building and repairing roads and bridges / [split] Building and repairing roads and bridges so that people and goods can move faster
(split) Improving and expanding public transit / [split] Improving and expanding public transit to relieve traffic congestion and shorten commute times
(split) Expanding broadband internet to rural communities / [split] Expanding broadband internet so that rural businesses are better connected
(split) Improving border infrastructure to reduce delays at customs / [split] mproving border infrastructure to reduce delays at customs and help Canadian businesses who buy and sell from US
(split) Offering tax credits for environmentally friendly home retrofits / [split] Offering tax credits for environmentally friendly home retrofits, to create jobs in construction industry
(split) Retrofitting buildings to make them more energy efficient / [split] Investing in solar and wind energy
(split) Investing in "green" environmentally friendly businesses / [split] Encouraging innovation and new technologies in Canadian businesses
(split) Increasing the amount of child benefits that go to parents / [split] Increasing the amount of child benefits that go to parents, to put more money back into the economy
(split) Cutting income taxes on the middle class / [split] Cutting income taxes on the middle class, to put more money back into the economy
(split) Diversifying Canada's economy by supporting new and emerging industries and sectors / [split] Protecting traditional industries and sectors which have fallen on tough times
(split) Leading trade missions to find new markets overseas for Canadian exports / [split] Signing free trade deals to find new markets overseas for Canadian exports

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

Continued...

Q.20 There are different words that could be used to describe the federal government's approach to dealing with the economy. Which one of these do you personally find most appealing? The government will READ AND ROTATE [kick-start, stimulate, re-imagine, revitalize, grow, modernize or restructure] the economy.

CODE ONE ONLY		
Kick-start the economy	1	
Stimulate the economy	2	
Re-imagine the economy	3	
Revitalize the economy	4	
Grow the economy	5	
Modernize the economy	6	
Restructure the economy	7	
VOLUNTEERED		
None are appealing	97	SKIP TO DEMOGRAPHICS
Don't know	99	SKIP TO DEMOGRAPHICS

Q.21 And which of these would be your second choice. The government will READ AND ROTATE [EXCLUDE CHOICE FROM Q.20 kick-start, stimulate, re-imagine, revitalize, grow, modernize or restructure] the economy

CODE ONE ONLY	
Kick-start the economy	1
Stimulate the economy	2
Re-imagine the economy	3
Revitalize the economy	4
Grow the economy	5
Modernize the economy	6
Restructure the economy	7
VOLUNTEERED	
No other is appealing	97
Don't know	99

Continued…

DEMOGRAPHICS

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

IF LANDLINE RECORD REGION FROM SAMPLE
IF CELL PHONE SAMPLE ASK C

C In which province or territory do you live?

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

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

Female	1
Male	2

E In what year were you born?

(RECORD YEAR - XXXX)
9999 – DO NOT READ: Don't know/Refused

F What is the highest level of formal education that you have completed?
(READ LIST)

Grade 8 or less	1
Some high school	2
High School diploma or equivalent	3
Registered Apprenticeship or other trades certificate or diploma	4
College, CEGEP or other non-university certificate or diploma	5
University certificate or diploma below Bachelor's level	6
Bachelor's degree	7
Post graduate degree above bachelor's level	8
[DO NOT READ]	
Prefer not to answer	99

G What language do you speak most often at home? [READ LIST — ACCEPT ALL THAT APPLY]

English 1
French 2
Another language DO NOT SPECIFY 3
VOLUNTEERED
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]

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]?

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

J 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

__ __ __ __ __ __
999999 – DK/NA

This completes the survey. In case my supervisor would like to verify that I conducted this interview, may I have your first name?

First Name: _____

This survey was conducted on behalf 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

8 février 2016

Ministère des Finances Canada
Sondage sur les attitudes à l'égard de l'économie canadienne
Environics Research – PN8806

Bonjour/bonsoir. Mon nom est _____ et je vous appelle de la part d'Environics, une société de recherche sur l'opinion publique.

CONFIRMER SI LE RÉPONDANT PRÉFÈRE QUE L'ENTREVUE SE DÉROULE EN ANGLAIS OU EN FRANÇAIS.

Nous effectuons aujourd'hui une étude pour le compte du gouvernement du Canada afin de savoir ce que les gens pensent de certains enjeux auxquels le pays fait face actuellement. Sachez que nous ne faisons pas de vente ni de sollicitation pour quoi que ce soit. Le sondage est effectué sur une base volontaire, et vos réponses demeureront entièrement anonymes et confidentielles. Ce sondage est inscrit dans le Système national d'inscription des sondages.

[SI ON VOUS LE DEMANDE : Le sondage est d'une durée d'environ 15 minutes.]
[SI ON VOUS LE DEMANDE : Le sondage est commandité par le ministère des Finances Canada.]
[SI ON VOUS LE DEMANDE : Ce sondage est inscrit dans le système national d'inscription des sondages. Le système d'inscription a été mis sur pied par l'industrie canadienne de recherche par sondages, afin de permettre au public de vérifier la légitimité d'un sondage, d'obtenir plus de renseignements au sujet de l'industrie des sondages ou de déposer une plainte. Le numéro de téléphone sans frais du système d'inscription est le suivant : 1 888 602-6742, poste 8728.]

SI ÉCHANTILLON ASSOCIÉ À UNE LIGNE TERRESTRE
Nous choisissons des numéros de téléphone au hasard, puis nous sélectionnons dans chaque foyer une personne à interviewer. Pour ce sondage, nous aimerions parler à la personne de votre ménage, âgée de 18 ans ou plus, qui a célébré son anniversaire de naissance le plus récemment. Est-ce vous?

SI ÉCHANTILLON ASSOCIÉ À UN CELLULAIRE, POSER A ET B
A Êtes-vous dans un endroit sécuritaire pour parler? Vous n'êtes pas, par exemple, au volant d'un véhicule automobile?

Oui [SE PRÉSENTER À NOUVEAU, AU BESOIN]
Non [FIXER UN RENDEZ-VOUS POUR UN RAPPEL (DATE/HEURE)]

B À la maison, avez-vous un téléphone terrestre traditionnel, différent d'un téléphone cellulaire?

Oui VÉRIFIER LES QUOTAS
Non VÉRIFIER LES QUOTAS

SONDAGE PRINCIPAL

Évaluation de l'économie

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

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

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

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

INSCRIRE MOT POUR MOT - [PLUSIEURS RÉPONSES POSSIBLES]

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

Q2. (T) Comment évaluez-vous l'état actuel de l'économie au Canada? (Veuillez répondre à l'aide d'une échelle de 1 à 10, où 1 signifie que vous jugez cet état désastreux et 10, que vous le jugez excellent.)

Désastreux	1
	2
	3
	4
	5
	6
	7
	8
	9
Excellent	10
NON SUGGÉRÉ	
Incertain(e)	99

[ALTERNER L'ORDRE DES QUESTIONS 3 ET 4]

Q3. (T) Comment évaluez-vous l'état actuel de l'économie aux États-Unis? (Veuillez répondre à l'aide d'une échelle de 1 à 10, où 1 signifie que vous jugez cet état désastreux et 10, que vous le jugez excellent.)

Désastreux	1
	2
	3
	4
	5
	6
	7
	8
	9
Excellent	10
NON SUGGÉRÉ	
Incertain(e)	99

Q4. (T) Comment évaluez-vous l'état actuel de l'économie à/au/en [PROVINCE]? (Veuillez répondre à l'aide d'une échelle de 1 à 10, où 1 signifie que vous jugez cet état désastreux et 10, que vous le jugez excellent.)

Désastreux	1
	2
	3
	4
	5
	6
	7
	8
	9
Excellent	10
NON SUGGÉRÉ	
Incertain(e)	99

Q5. (T) Pensez à la situation de l'économie canadienne dans six mois; croyez-vous que l'économie canadienne sera alors plus forte qu'aujourd'hui, plus faible qu'aujourd'hui ou la même qu'aujourd'hui?
[NOTE À L'INTERVIEWEUR : SI LE RÉPONDANT AFFIRME « ESPÉRER » QU'ELLE SERA PLUS FORTE, LUI DEMANDER DE PRÉCISER PLUTÔT S'IL *PENSE* QUE CE SERA LE CAS]

Plus forte	1
Plus faible	2
La même	3
Je ne sais pas	99

Poursuivons…

ALTERNER L'ORDRE DES QUESTIONS Q6 À Q11 (NOTE : Q7 DOIT TOUJOURS SUIVRE Q6, Q9 DOIT TOUJOURS SUIVRE Q8, ET Q11 DOIT TOUJOURS SUIVRE Q10). RÉPÉTER L'ÉCHELLE AU BESOIN.

Q6. Comment évaluez-vous personnellement la valeur du dollar canadien à l'heure actuelle? Veuillez répondre à l'aide d'une échelle de 1 à 10, où 1 signifie que sa valeur actuelle s'avère à vos yeux un élément très négatif et 10, un élément très positif.

Élément très négatif	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Élément très positif	10	
NON SUGGÉRÉ		
Ne fait pas vraiment de différence	97	PASSER À Q8
Cela dépend	98	PASSER À Q8
Je ne sais pas	99	PASSER À Q8

Q7. POSER SI CODES 01 à 10 À Q6 : Pourquoi dites-vous cela?

INSCRIRE MOT POUR MOT

NSP/PR 99

Suite…

Q8. Comment évaluez-vous personnellement le prix de l'essence à l'heure actuelle? Veuillez répondre à l'aide d'une échelle de 1 à 10, où 1 signifie que son prix actuel s'avère à vos yeux un élément très négatif et 10, un élément très positif.

Élément très négatif	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Élément très positif	10	
NON SUGGÉRÉ		
Ne fait pas vraiment de différence	97	PASSER À Q10
Cela dépend	98	PASSER À Q10
Je ne sais pas	99	PASSER À Q10

Q9. POSER SI CODES 01 à 10 À Q8 : Pourquoi dites-vous cela?

INSCRIRE MOT POUR MOT

NSP/PR 99

Q10. Comment évaluez-vous personnellement les taux d'intérêt en vigueur à l'heure actuelle? Veuillez répondre à l'aide d'une échelle de 1 à 10, où 1 signifie que les taux actuels s'avèrent à vos yeux un élément très négatif et 10, un élément très positif.

Élément très négatif	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	
Élément très positif	10	
NON SUGGÉRÉ		
Ne fait pas vraiment de différence	97	PASSER À Q12
Cela dépend	98	PASSER À Q12
Je ne sais pas	99	PASSER À Q12

Q11. POSER SI CODES 01 à 10 À Q10 : Pourquoi dites-vous cela?

INSCRIRE MOT POUR MOT

NSP/PR 99

Situation financière personnelle

Q12. Comment évaluez-vous votre propre situation financière? Veuillez répondre à l'aide d'une échelle de 1 à 10, où 1 signifie que vous la jugez désastreuse et 10, que vous la jugez excellente.

Désastreuse	1
	2
	3
	4
	5
	6
	7
	8
	9
Excellente	10
Je ne sais pas	99

Q13. Dans quelle mesure, s'il y a lieu, la possibilité qu'un membre de votre ménage ou vous-même vous retrouviez sans emploi au cours des six prochains mois vous préoccupe-t-elle? Veuillez répondre à l'aide d'une échelle de 1 à 10, où 1 signifie que cette possibilité ne vous préoccupe pas de tout et 10, qu'elle vous préoccupe énormément.

Ne me préoccupe pas du tout	1
	2
	3
	4
	5
	6
	7
	8
	9
Me préoccupe énormément	10
Je ne sais pas	99

Impôts

Q14. Pensez au niveau d'impôts payés par l'ensemble des Canadiens par rapport aux services fournis par les gouvernements; à votre avis, les Canadiens paient-ils trop, juste assez ou trop peu d'impôts?

Trop	1
Juste assez	2
Trop peu	3
NON SUGGÉRÉ	
Cela dépend	98
Je ne sais pas	99

Q15. ALTERNER L'ORDRE DE PRÉSENTATION DES ÉNONCÉS :

Certaines/d'autres personnes sont d'avis que les impôts sont un élément essentiellement positif, puisqu'ils permettent de financer des services importants qui contribuent à notre qualité de vie, par exemple les soins de santé, l'éducation et les travaux routiers.

Certaines/d'autres personnes sont d'avis que les impôts sont un élément essentiellement négatif, puisqu'ils font en sorte de soutirer de l'argent à la population et ralentissent la croissance de l'économie ainsi que la création de richesse.

Lequel de ces points de vue se rapproche le plus du vôtre?

SI LE RÉPONDANT DIT « LES DEUX DE FAÇON ÉGALE », EXPLORER POUR SAVOIR CELUI QUI S'EN RAPPROCHE LE PLUS

Les impôts sont un élément essentiellement positif	1
Les impôts sont un élément essentiellement positif	2
NON SUGGÉRÉ	
Les deux de façon égale	3
Cela dépend	6
Je ne sais pas	99

Suite…

Gouvernement/finances

LIRE : Poursuivons…

Q16. (T)D'après ce que vous en savez, quel est l'état actuel des finances du gouvernement fédéral? Est-ce que le gouvernement… [ALTERNER L'ORDRE DE PRÉSENTATION] :

accuse un *déficit* annuel, ce qui signifie qu'il *dépense* plus d'argent qu'il n'en *reçoit*?
bénéficie d'un *surplus* annuel, ce qui signifie qu'il *reçoit* plus d'argent qu'il n'en *dépense*?
TOUJOURS LIRE EN DERNIER : maintient un certain équilibre budgétaire?
[RÉPÉTER LA LISTE AU BESOIN]

Accuse un déficit annuel	1
Bénéficie d'un surplus annuel	2
Maintient un certain équilibre budgétaire	3
Je ne sais pas	99

Q17. ALTERNER L'ORDRE DE PRÉSENTATION DES ÉNONCÉS :

Certaines/d'autres personnes affirment que les décisions et actions du gouvernement fédéral peuvent avoir une influence importante sur l'état de l'économie canadienne.

Certaines/d'autres personnes affirment que l'état de l'économie dépend principalement de la situation mondiale, et que notre gouvernement n'a que peu d'influence sur celui-ci.

Lequel de ces points de vue se rapproche le plus du vôtre?

SI LE RÉPONDANT DIT « LES DEUX DE FAÇON ÉGALE », EXPLORER POUR SAVOIR CELUI QUI S'EN RAPPROCHE LE PLUS

Les décisions gouvernementales ont une influence importante sur l'économie	1
L'économie dépend principalement de la situation mondiale	2
NON SUGGÉRÉ	
Les deux de façon égale	3
Cela dépend	6
Je ne sais pas	99

Q.18 Dans quelle mesure, s'il y a lieu, chacune des mesures suivantes devrait-elle être une priorité pour le gouvernement du Canada? Veuillez répondre à l'aide d'une échelle de 1 à 10, où 1 signifie que la mesure ne devrait être que très peu prioritaire et 10, qu'elle devrait être hautement prioritaire. LIRE ET ALTERNER L'ORDRE DE PRÉSENTATION

Créer de nouveaux emplois
Créer des emplois à temps plein mieux rémunérés
Investir dans des programmes de formation et de recyclage professionnels permettant aux Canadiens d'acquérir les compétences nécessaires pour trouver un emploi
Créer des emplois pour les jeunes
Fournir un soutien financier aux personnes ayant récemment perdu leur emploi afin de les aider à se remettre sur pied
Fournir une formation axée sur l'acquisition de compétences aux personnes ayant récemment perdu leur emploi afin de les aider à se remettre sur pied

RÉPÉTER L'ÉCHELLE AU BESOIN

Très peu prioritaire	1
	2
	3
	4
	5
	6
	7
	8
	9
Hautement prioritaire	10
Je ne sais pas	99

Q.19 Pensez à l'économie canadienne; dans quelle mesure, s'il y a lieu, chacune des politiques suivantes serait-elle efficace pour favoriser sa croissance et son amélioration? Veuillez répondre à l'aide d'une échelle de 1 à 10, où 1 signifie que la politique ne serait pas du tout efficace et 10, qu'elle serait très efficace. LIRE ET ALTERNER L'ORDRE DE PRÉSENTATION… RÉPARTIR CHAQUE OPTION 50/50

(répartir) Construire et réparer routes et ponts/[répartir] Construire et réparer routes et ponts de façon à accélérer les déplacements des personnes et des marchandises
(répartir) Améliorer et accroître l'offre de transport en commun/[répartir] Améliorer et accroître l'offre de transport en commun de façon à désengorger le trafic et à raccourcir les déplacements domicile-travail
(répartir) Étendre le service Internet à haute vitesse aux communautés rurales/[répartir] Étendre le service Internet à haute vitesse afin que les entreprises en milieu rural soient mieux connectées
(répartir) Améliorer les infrastructures frontalières afin de réduire le temps d'attente aux douanes/[répartir] Améliorer les infrastructures frontalières afin de réduire le temps d'attente aux douanes et de venir en aide aux entreprises canadiennes qui achètent des États-Unis ou vendent aux États-Unis
(répartir) Offrir des crédits d'impôt pour des rénovations domiciliaires écologiques/[répartir] Offrir des crédits d'impôt pour des rénovations domiciliaires écologiques, afin de créer des emplois dans le secteur de la construction
(répartir) Rénover des immeubles de façon à les rendre plus écoénergétiques/[répartir] Investir dans l'énergie solaire et l'énergie éolienne
(répartir) Investir dans des entreprises « vertes »/[répartir] Encourager l'innovation et les nouvelles technologies au sein des entreprises canadiennes
(répartir) Bonifier les prestations pour enfants destinées aux parents/[répartir] Bonifier les prestations pour enfants destinées aux parents, afin de réinjecter plus d'argent dans l'économie
(répartir) Abaisser l'impôt sur le revenu de la classe moyenne/[répartir] Abaisser l'impôt sur le revenu de la classe moyenne, afin de réinjecter plus d'argent dans l'économie
(répartir) Diversifier l'économie canadienne en appuyant les industries et secteurs d'activité émergents/[répartir] Protéger les industries et secteurs d'activité traditionnels, qui connaissent des temps difficiles
(répartir) Mener des missions commerciales afin de trouver de nouveaux marchés à l'étranger pour les exportations canadiennes/[répartir] Signer des ententes de libre-échange afin de trouver de nouveaux marchés à l'étranger pour les exportations canadiennes

Pas du tout efficace	1
	2
	3
	4
	5
	6
	7
	8

	9
Très efficace	10
Je ne sais pas	99

Suite…

Q.20 Différents termes peuvent être utilisés pour décrire l'approche du gouvernement fédéral en matière d'économie. Lequel de ces termes vous semble le plus intéressant? Le gouvernement va… LIRE ET ALTERNER L'ORDRE DE PRÉSENTATION [faire redémarrer, stimuler, réinventer, dynamiser, faire croître, moderniser ou restructurer] l'économie.

INSCRIRE UNE SEULE RÉPONSE		
Faire redémarrer l'économie	1	
Stimuler l'économie	2	
Réinventer l'économie	3	
Dynamiser l'économie	4	
Faire croître l'économie	5	
Moderniser l'économie	6	
Restructurer l'économie	7	
NON SUGGÉRÉ		
Aucun n'est intéressant	97	PASSER AUX DONNÉES DÉMOGRAPHIQUES
Je ne sais pas	99	PASSER AUX DONNÉES DÉMOGRAPHIQUES

Q.21 Et lequel de ces termes serait votre deuxième choix? Le gouvernement va… LIRE ET ALTERNER L'ORDRE DE PRÉSENTATION [EXCLURE L'OPTION CHOISIE À Q20 faire redémarrer, stimuler, réinventer, dynamiser, faire croître, moderniser ou restructurer] l'économie.

INSCRIRE UNE SEULE RÉPONSE	
Faire redémarrer l'économie	1
Stimuler l'économie	2
Réinventer l'économie	3
Dynamiser l'économie	4
Faire croître l'économie	5
Moderniser l'économie	6
Restructurer l'économie	7
NON SUGGÉRÉ	
Aucun n'est intéressant	97
Je ne sais pas	99

Suite…

DONNÉES DÉMOGRAPHIQUES

LIRE : Et voici enfin quelques questions à des fins démographiques.

SI LIGNE TERRESTRE, INSCRIRE LA RÉGION À PARTIR DE L'ÉCHANTILLON
SI ÉCHANTILLON ASSOCIÉ À UN CELLULAIRE, POSER C

C Dans quelle province ou quel territoire demeurez-vous?

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

D Sexe [NE PAS DEMANDER : inscrire en fonction des observations de l'intervieweur]

Femme	1
Homme	2

E Quelle est votre année de naissance?

(INSCRIRE L'ANNÉE — XXXX)
9999 – [NE PAS LIRE] Je ne sais pas/je refuse de répondre

F Quel est le niveau de scolarité le plus élevé que vous avez atteint?
(LIRE LA LISTE)

8e année ou moins	1
Études secondaires en partie	2
Diplôme d'études secondaires ou équivalent	3
Apprentissage enregistré, ou certificat ou diplôme d'une école de métiers	4
Collège, CÉGEP, ou certificat ou diplôme non universitaire	5
Certificat ou diplôme universitaire inférieur au baccalauréat	6
Baccalauréat	7
Diplôme universitaire supérieur au baccalauréat	8
[NE PAS LIRE]	
Je préfère ne pas répondre	99

G Quelle langue parlez-vous le plus souvent à la maison? [LIRE LA LISTE — ACCEPTER TOUTES LES RÉPONSES QUI S'APPLIQUENT]

Anglais	1
Français	2
Autre langue (NE PAS PRÉCISER)	3
NON SUGGÉRÉ	
Je ne sais pas/je refuse de répondre	99

H Laquelle des catégories suivantes décrit le mieux votre situation d'emploi actuelle? [LIRE LA LISTE – ACCEPTER UNE RÉPONSE SEULEMENT]

Travailleur(se) à temps plein, c'est-à-dire 35 heures ou plus par semaine	1
Travailleur(se) à temps partiel, c'est-à-dire moins de 35 heures par semaine	2
Travailleur(se) autonome	3
Sans emploi, mais à la recherche d'un emploi	4
Étudiant(e) à temps plein	5
Retraité(e)	6
Je ne fais pas partie de la population active (PERSONNE AU FOYER À TEMPS PLEIN, SANS EMPLOI, NE CHERCHANT PAS DE TRAVAIL) [NE PAS LIRE]	7
Autre (NE PAS PRÉCISER) [NE PAS LIRE]	98
Je refuse de répondre	99

I Laquelle des catégories suivantes décrit le mieux le revenu total de votre ménage, c'est-à-dire le total des revenus avant impôts de toutes les personnes vivant sous votre toit? [LIRE LA LISTE]

Moins de 20 000 $	1
De 20 000 $ à moins de 40 000 $	2
De 40 000 $ à moins de 60 000 $	3
De 60 000 $ à moins de 80 000 $	4
De 80 000 $ à moins de 100 000 $	5
De 100 000 $ à moins de 150 000 $	6
150 000 $ et plus	7
(NE PAS LIRE) Je refuse de répondre	99

J Pour terminer, afin de mieux comprendre la façon dont les résultats varient d'une région à l'autre, puis-je avoir les six caractères de votre code postal? ACCEPTER LES TROIS PREMIERS CARACTÈRES SI LE RÉPONDANT NE VEUT PAS EN DIVULGUER DAVANTAGE

__ __ __ __ __ __

999999 – NSP/PR

Voilà qui termine le sondage. Au cas où mon superviseur voudrait vérifier que j'ai bien effectué le sondage, puis avoir votre prénom?

Prénom : _____

Ce sondage a été réalisé pour le compte du ministère des Finances Canada, et est enregistré conformément à la Loi canadienne sur l'accès à l'information. Je vous remercie de votre participation.

INSCRIRE :

Langue de l'entrevue

Anglais	1
Français	2