

Creating jobs top priority; lower confidence in balancing budgets

Nanos Policy Map Summary - DRAFT

September 2017
(Submission 2017-1064B)



Summary

Canadians continue to give high levels of importance to economic issues, with no significant differences compared to the previous wave. Canadians' confidence in finding solutions to most economic challenges has generally remained consistent or somewhat increased since 2016.

- **Creating jobs has a higher importance score compared to other economic issues** – When rating the importance of various economic issues using a ten point scale, creating jobs was rated more important by Canadians (mean score of 8.4), followed by investing in infrastructure such as roads and bridges (8.3), being energy self-sufficient (8.3), having trade policies that encourage investment (7.9), and balancing government budgets (7.6). Creating jobs has consistently received higher importance scores since 2012 (8.7 in 2012, 8.7 in 2013, 8.5 in 2015, and 8.5 in 2016). There have been no significant changes in the importance scores of economic issues compared to 2016.
- **Confidence is steady in investing in infrastructure and in having trade policies that encourage investment** – Canadians' confidence in finding solutions for investing in infrastructure has remained stable since 2016, although it had been trending up since the first wave of the survey. In 2017, two thirds of Canadians say they are either confident (13%) or somewhat confident (53%) compared to 17 per cent confident and 50 per cent somewhat confident in 2016.
- **Confidence in finding solutions to economic challenges marginally higher** – Confidence in finding solutions to have trade policies that encourage investment (nine per cent confident and 50% somewhat confident in 2017, compared to 10% confident and 44% somewhat confident in 2016) and being energy self-sufficient (15% confident and 42% somewhat confident in 2017, compared to 13% confident and 39% somewhat confident in 2016) has marginally increased. Confidence in creating jobs has stayed roughly the same with over half of Canadians saying they are confident (eight per cent in 2017 and nine per cent in 2016) or somewhat confident (46% in 2017 and 43% in 2016).
- **Confidence and importance of balancing budgets lower** – Canadians' confidence in balancing the budget has remained fairly stable since 2016, with five per cent of Canadians saying they are confident and 28 per cent saying somewhat confident compared to seven per cent confident and 27 per cent somewhat confident in the previous wave. In 2017, 31 per cent of Canadians say they are somewhat not confident, while 35 per cent are not confident (31% somewhat not confident and 31% not confident in 2016) in our ability as a nation to find solutions to balance budgets. Balancing budgets received a lower importance score (7.6 out of 10 in 2017) than other issues in this grouping, with no significant changes compared to the previous wave.

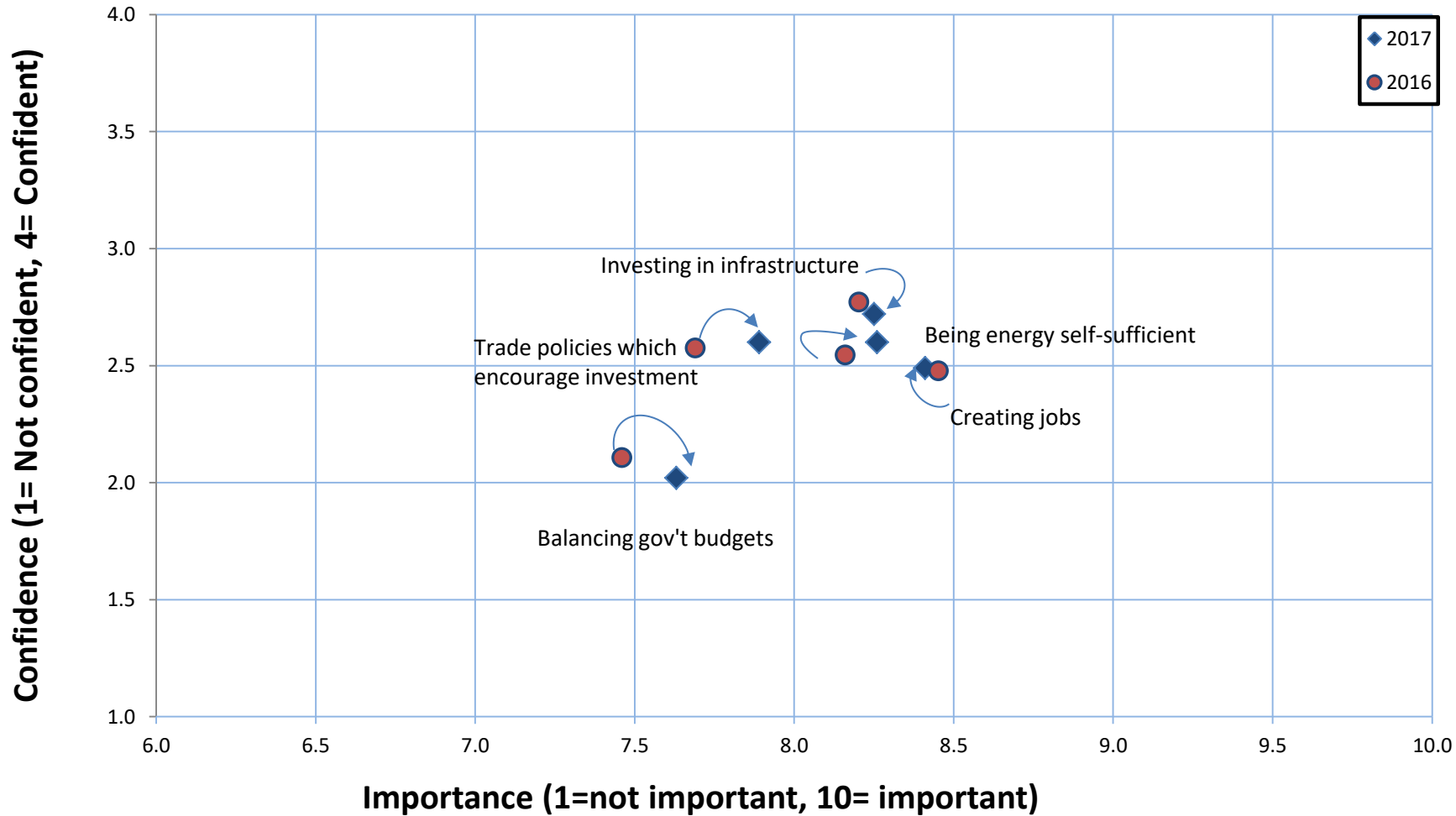
These observations are based on a hybrid telephone and online random survey of 1,000 Canadians between July 28th and August 1st, 2016, as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada. Individuals randomly called using random digit dialling with a maximum of five call backs. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

The previous waves consist of an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between July 28th and August 1st, 2016 as part of an omnibus survey. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

2017 Economic Policy Map

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 23rd to 26th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 28th to August 1st, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Canada Policy - Confidence vs. Importance Map



2016-2017 Economic policy map table

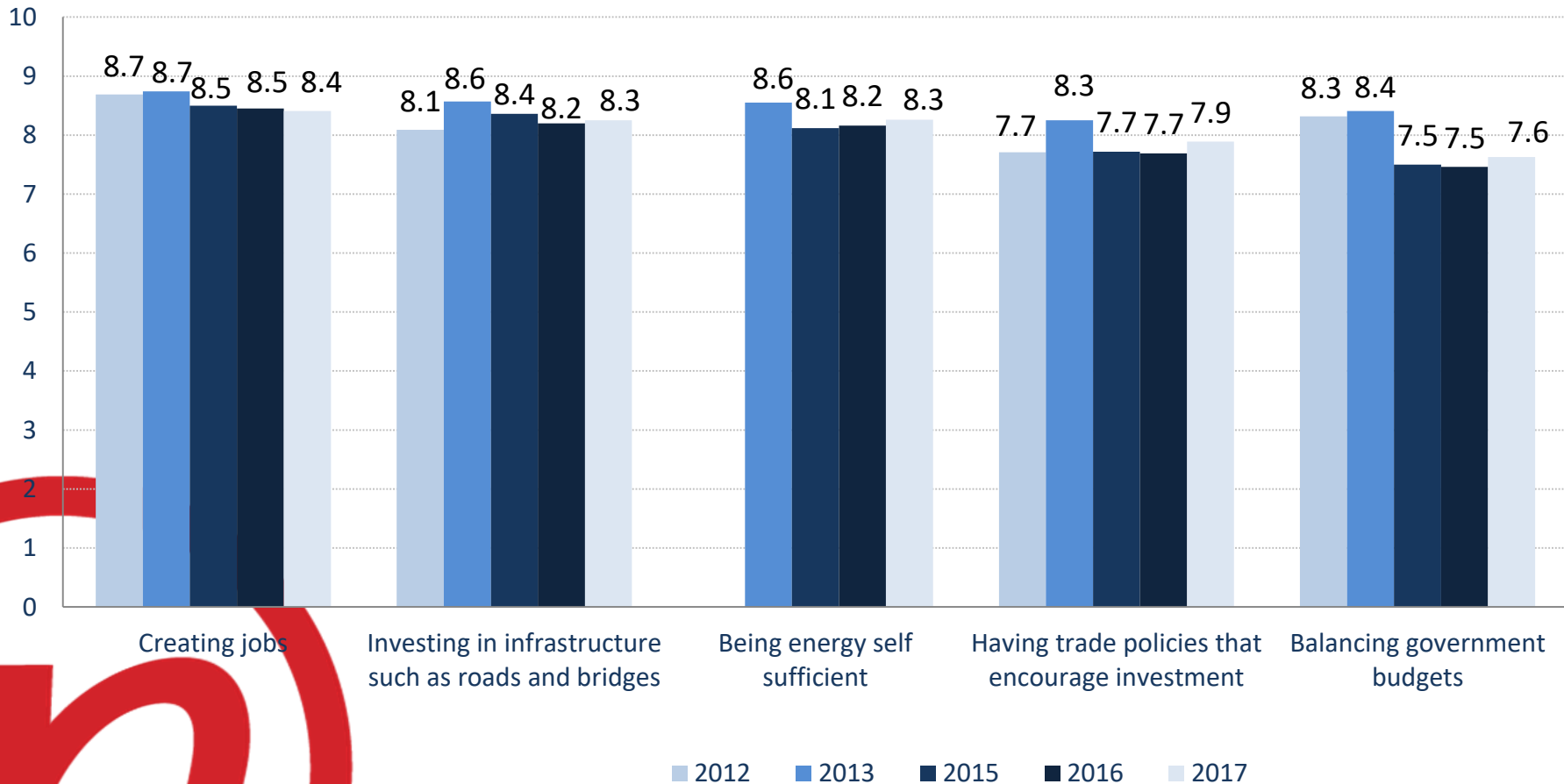
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		2016	2017	Change
Creating jobs	Importance (Mean score out of ten)	8.5	8.4	-0.1
	Confidence (Mean score out of four)	2.5	2.5	-
Investing in infrastructure	Importance (Mean score out of ten)	8.2	8.3	+0.1
	Confidence (Mean score out of four)	2.8	2.7	-0.1
Being energy self-sufficient	Importance (Mean score out of ten)	8.2	8.3	+0.1
	Confidence (Mean score out of four)	2.6	2.6	-
Trade policies that encourage investment	Importance (Mean score out of ten)	7.7	7.9	+0.2
	Confidence (Mean score out of four)	2.6	2.6	-
Balancing government budgets	Importance (Mean score out of ten)	7.5	7.6	+0.1
	Confidence (Mean score out of four)	2.1	2.0	-0.1

Importance of economic challenges

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 23rd to 26th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
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 Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, April 6th to 9th, 2013, n=1013, accurate 3.1 percentage points plus or minus, 19 times out of 20.
 Source: Nanos Research, representative online random survey, July 5th to 9th, 2012, n=1333.



QUESTION – For each of the challenges, please rate their importance to you on a scale of 1 to 10, where 1 is not at all important and 10 is very important in terms of Canada’s future [Randomize]

Importance of trade policies that encourage investment

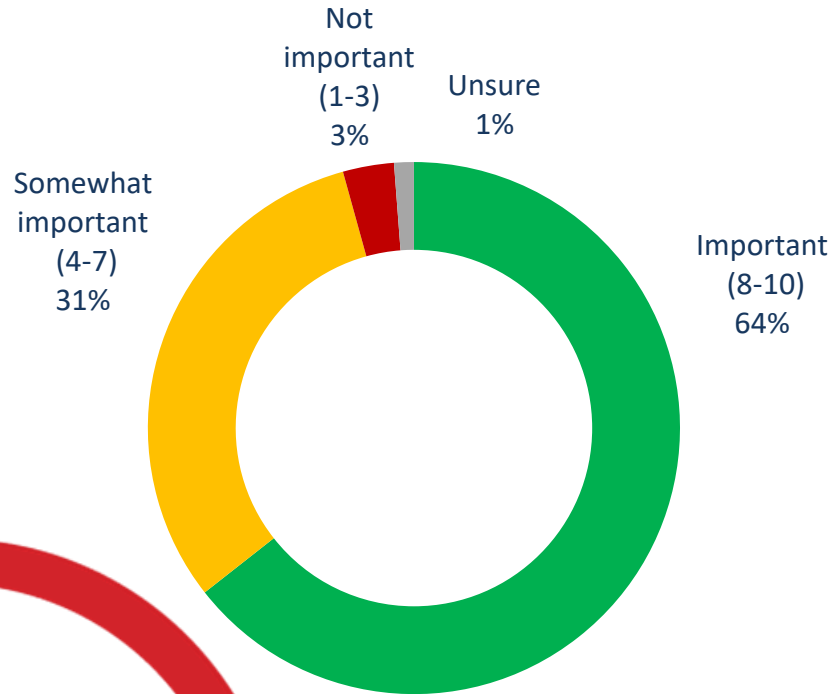
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Year	Prime Minister	Mean Score
2012	Harper	7.71
2013	Harper	8.25
2015	Harper	7.72
2016	Trudeau	7.69
2017	Trudeau	7.89

***Note:** Charts may not add up to 100 due to rounding

QUESTION – For each of the challenges, please rate their importance to you on a scale of 1 to 10, where 1 is not at all important and 10 is very important in terms of Canada’s future.
[RANDOMIZE]

Having trade policies that encourage investment

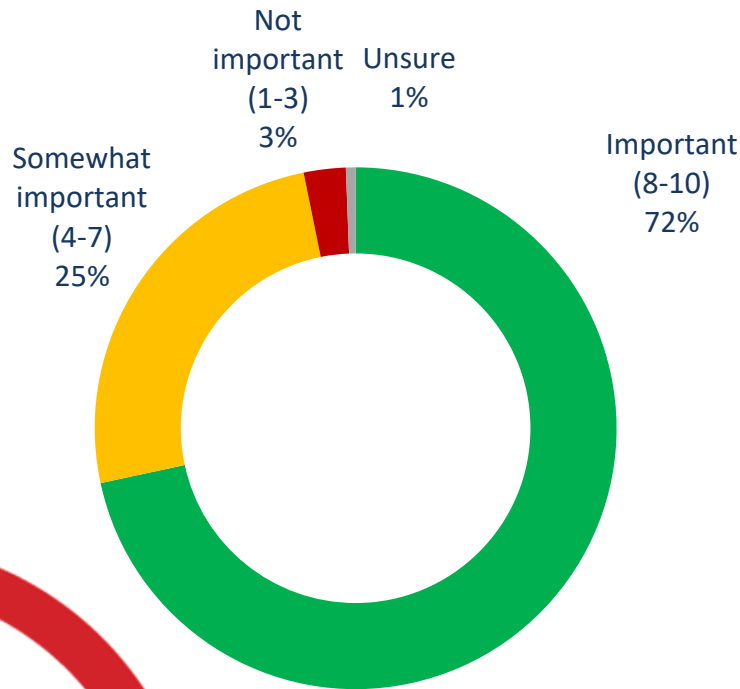
Importance of being energy self-sufficient

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Year	Prime Minister	Mean Score
2013	Harper	8.55
2015	Harper	8.12
2016	Trudeau	8.16
2017	Trudeau	8.26

***Note: Charts may not add up to 100 due to rounding**

QUESTION – For each of the challenges, please rate their importance to you on a scale of 1 to 10, where 1 is not at all important and 10 is very important in terms of Canada’s future.
[RANDOMIZE]

Being energy self-sufficient

Importance of creating jobs

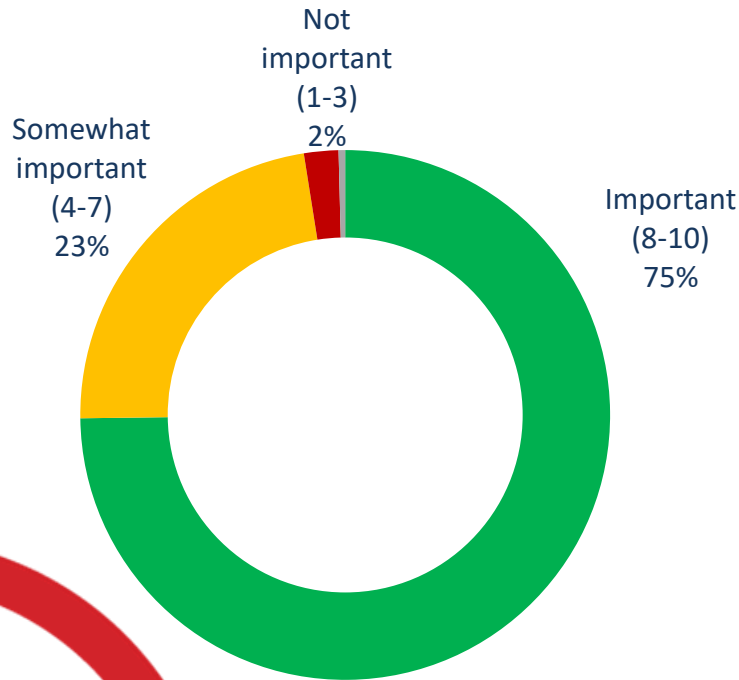
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Year	Prime Minister	Mean Score
2012	Harper	8.69
2013	Harper	8.74
2015	Harper	8.50
2016	Trudeau	8.45
2017	Trudeau	8.41

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QUESTION – For each of the challenges, please rate their importance to you on a scale of 1 to 10, where 1 is not at all important and 10 is very important in terms of Canada’s future.

[RANDOMIZE]

Creating jobs

Importance of balancing government budgets

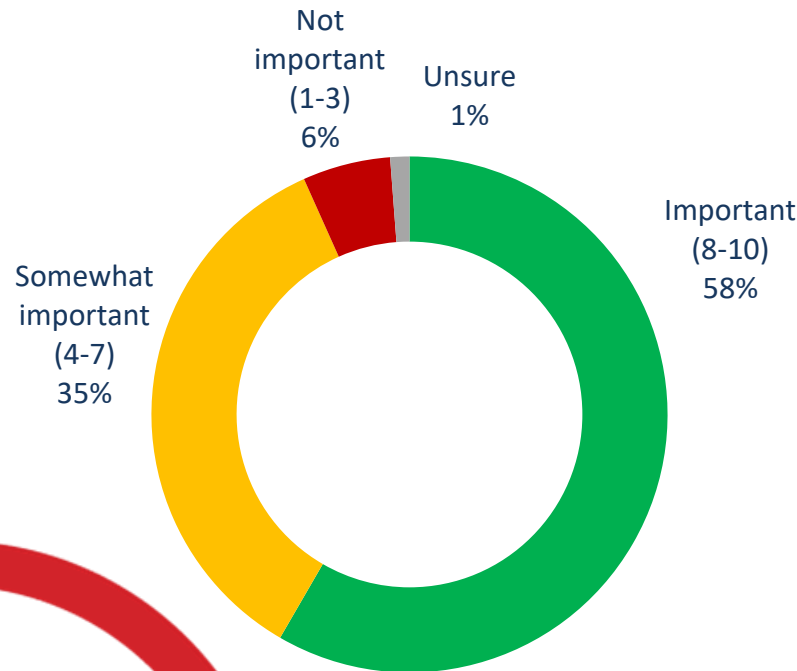
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Year	Prime Minister	Mean Score
2012	Harper	8.32
2013	Harper	8.41
2015	Harper	7.50
2016	Trudeau	7.46
2017	Trudeau	7.63

***Note: Charts may not add up to 100 due to rounding**

QUESTION – For each of the challenges, please rate their importance to you on a scale of 1 to 10, where 1 is not at all important and 10 is very important in terms of Canada’s future.
[RANDOMIZE]

Balancing government budgets

Importance of investing in infrastructure

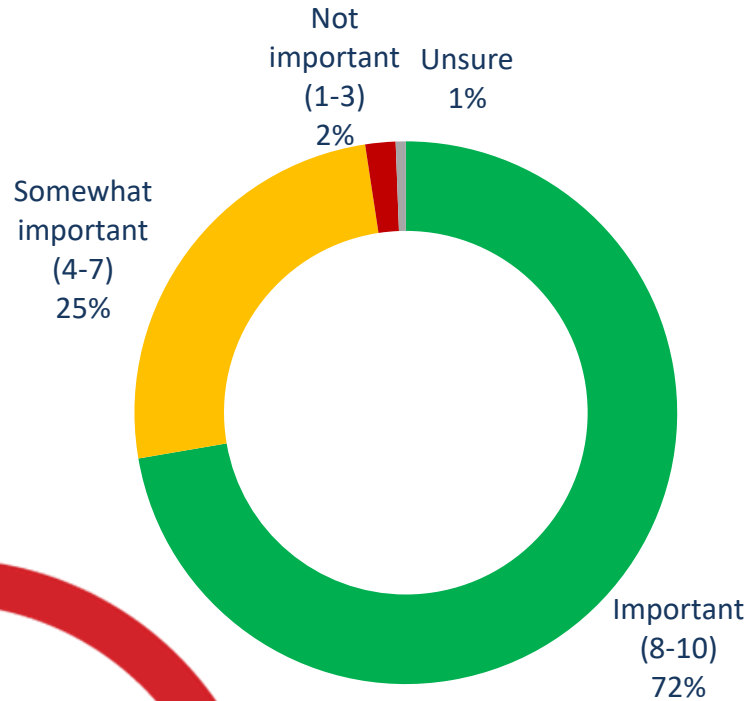
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Year	Prime Minister	Mean Score
2012	Harper	8.09
2013	Harper	8.57
2015	Harper	8.36
2016	Trudeau	8.20
2017	Trudeau	8.25

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QUESTION – For each of the challenges, please rate their importance to you on a scale of 1 to 10, where 1 is not at all important and 10 is very important in terms of Canada’s future.
[RANDOMIZE]

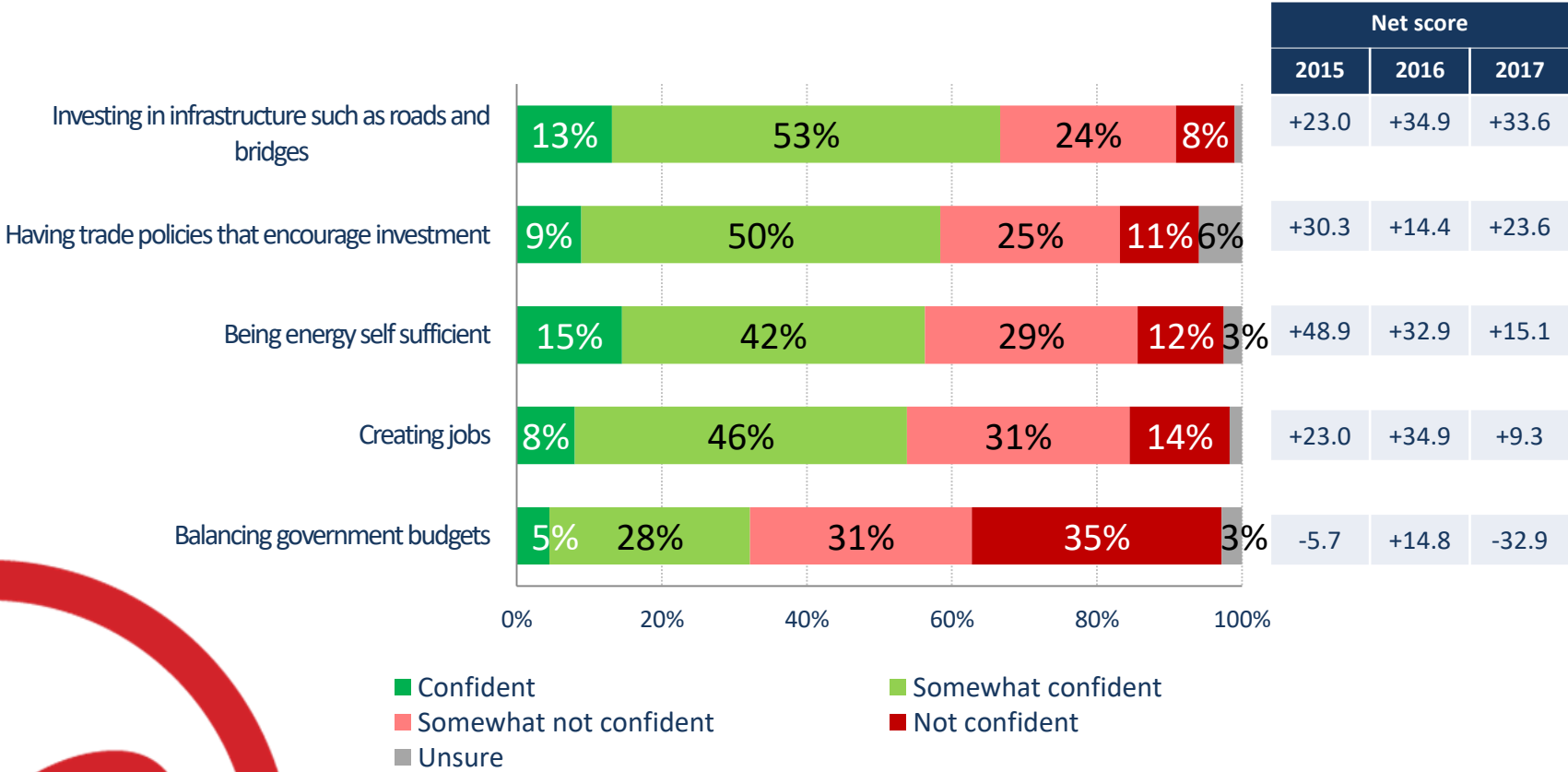
Investing in infrastructure such as roads and bridges

Confidence in nation's ability to find solutions

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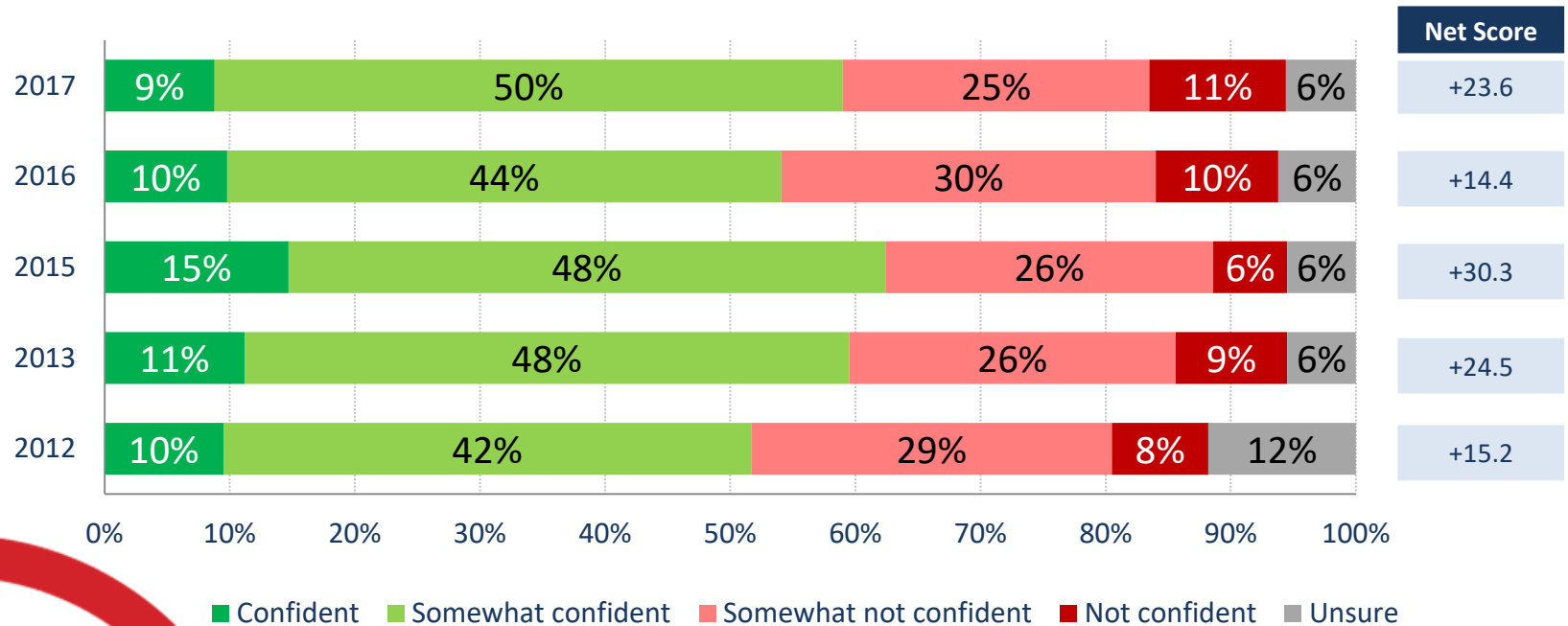


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QUESTION – For each of the challenges, are you confident, somewhat confident, somewhat not confident or not confident in our ability as a nation to find solutions?
[RANDOMIZE]

Confidence in trade policies that encourage investment

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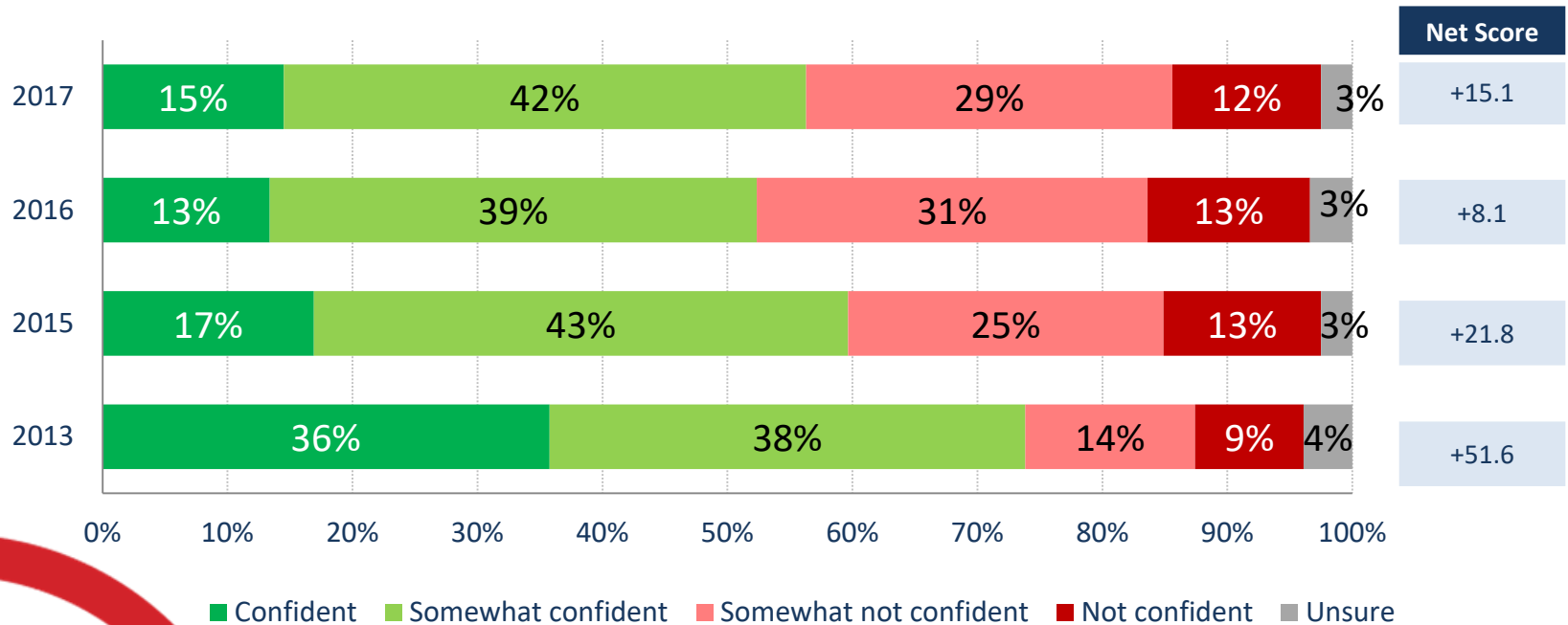
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QUESTION – For each of the challenges, are you confident, somewhat confident, somewhat not confident or not confident in our ability as a nation to find solutions?
 [RANDOMIZE]

Having trade policies that encourage investment

Confidence in being energy self-sufficient

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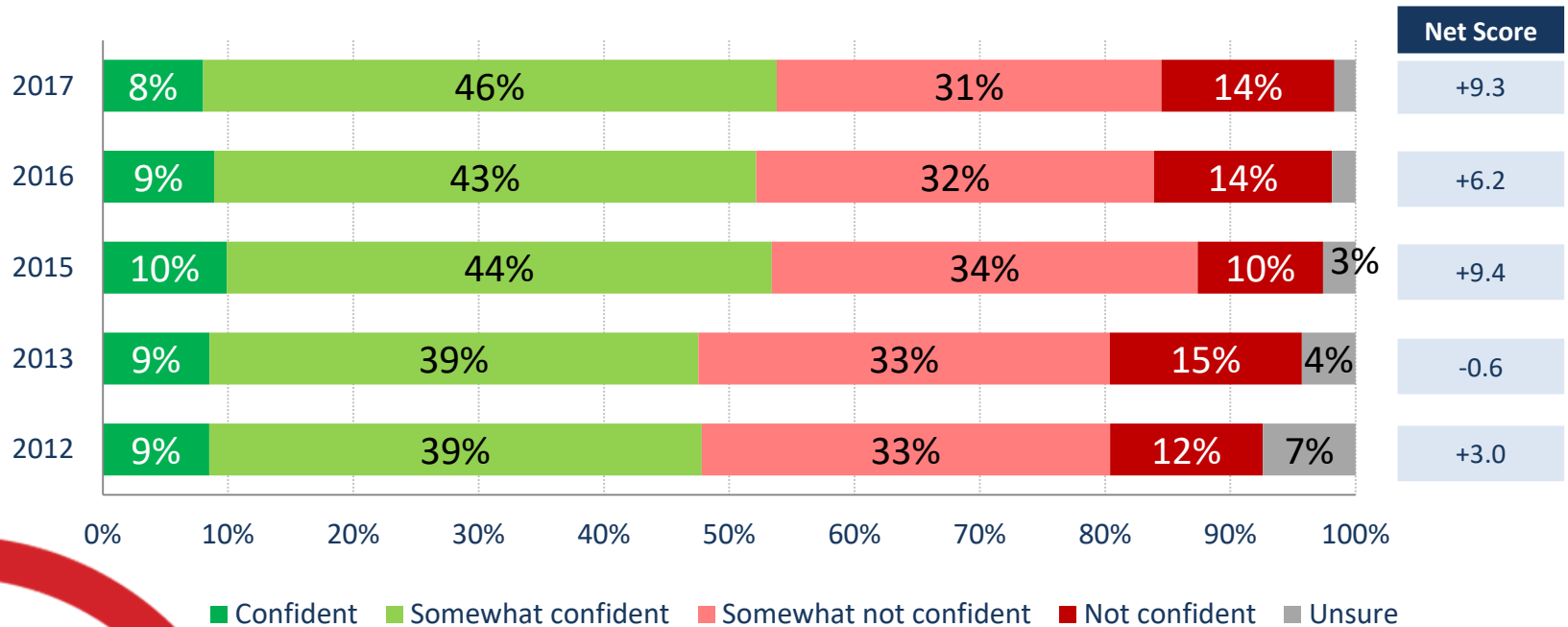
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QUESTION – For each of the challenges, are you confident, somewhat confident, somewhat not confident or not confident in our ability as a nation to find solutions?
 [RANDOMIZE]

Being energy self-sufficient

Confidence in creating jobs

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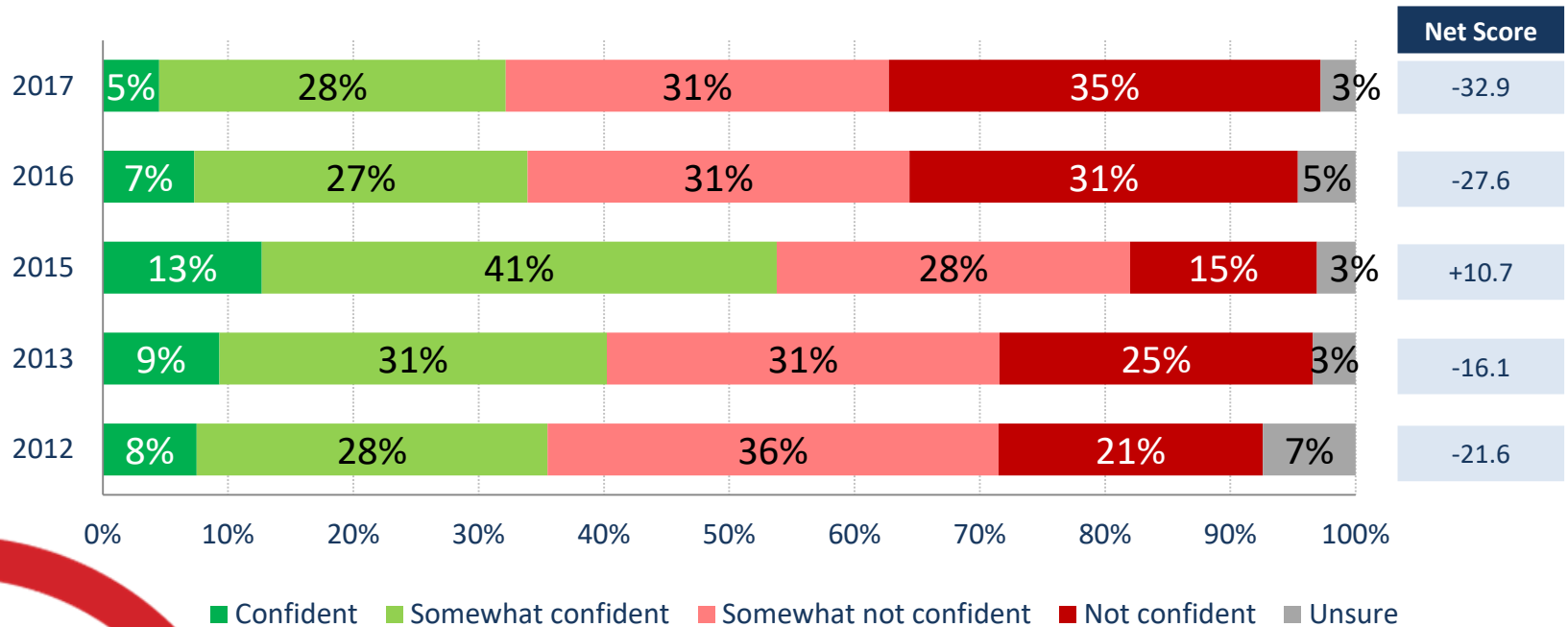
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QUESTION – For each of the challenges, are you confident, somewhat confident, somewhat not confident or not confident in our ability as a nation to find solutions?
 [RANDOMIZE]

Creating jobs

Confidence in balancing government budgets

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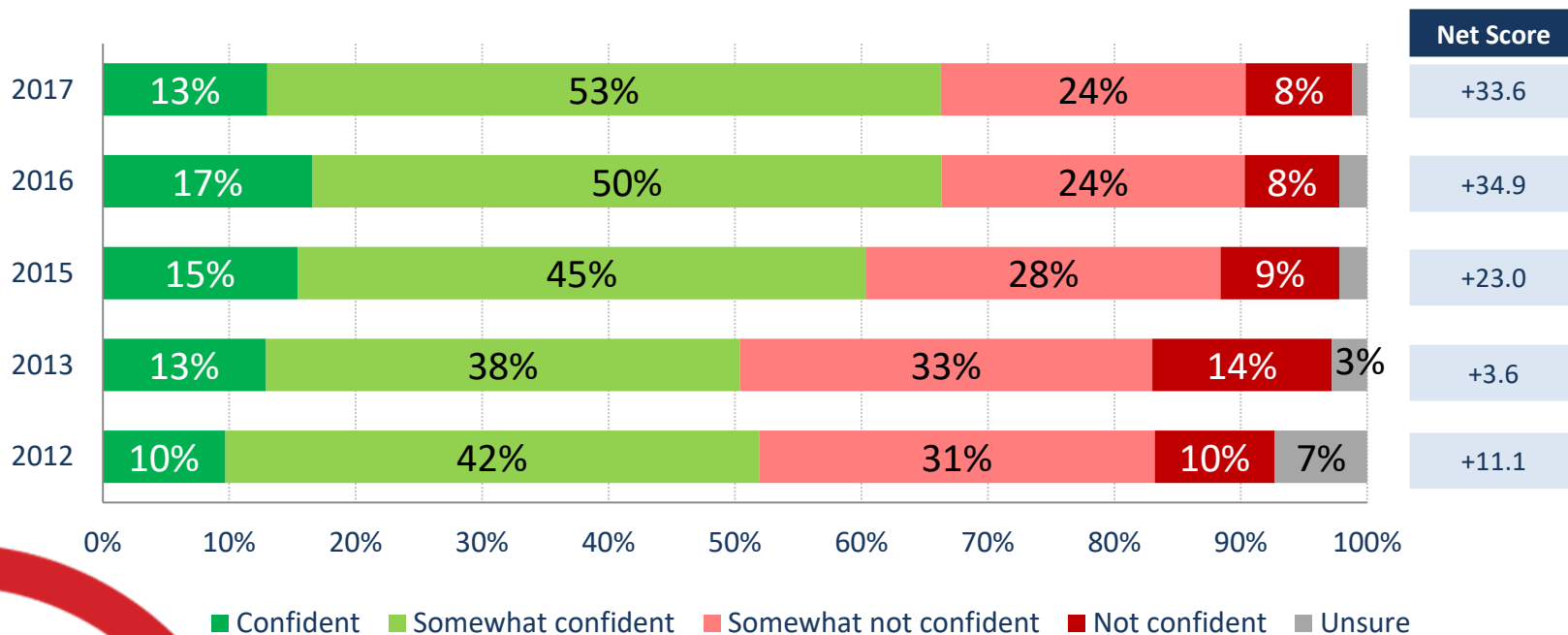
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QUESTION – For each of the challenges, are you confident, somewhat confident, somewhat not confident or not confident in our ability as a nation to find solutions?
 [RANDOMIZE]

Balancing government budgets

Confidence in infrastructure investment

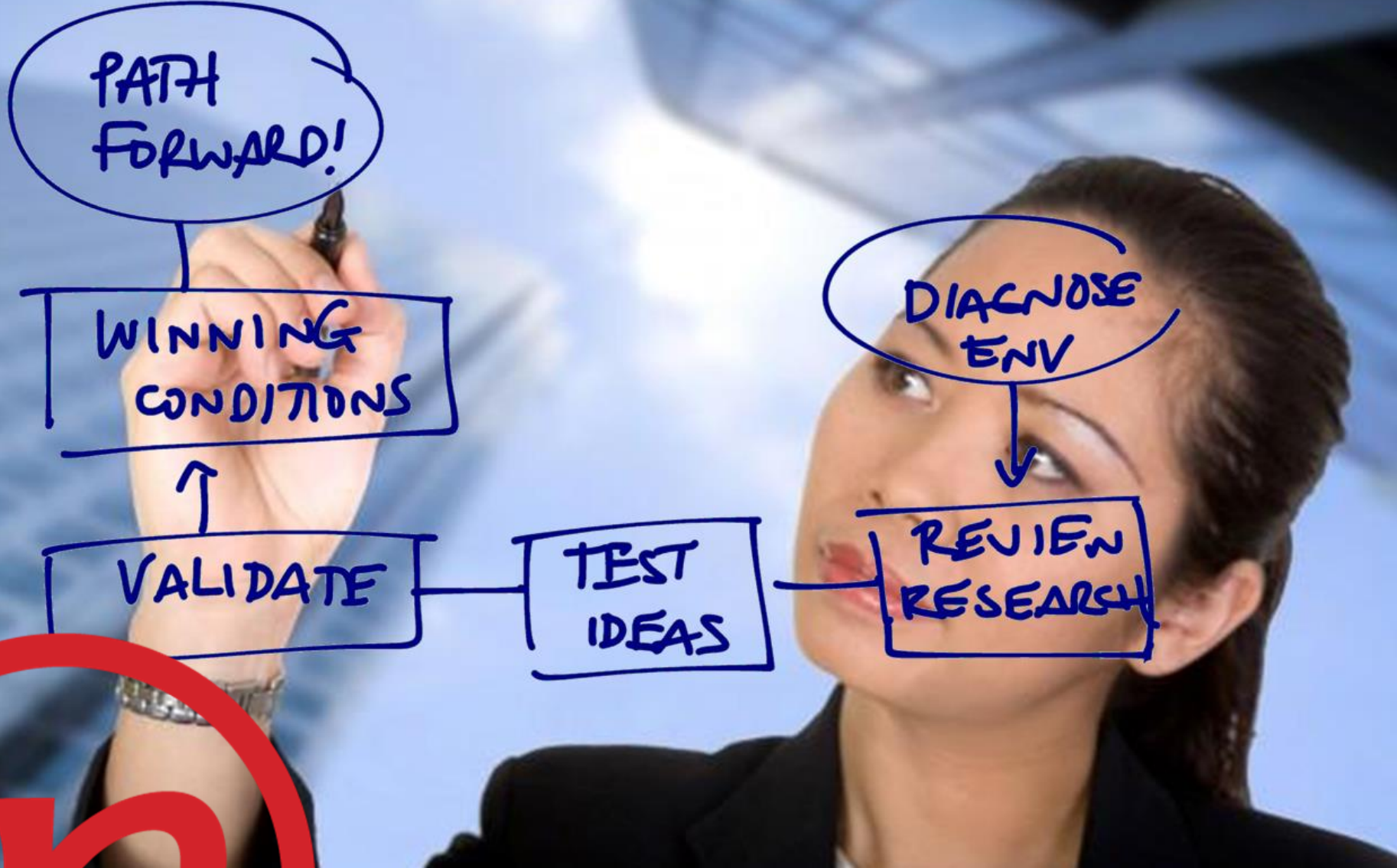
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QUESTION – For each of the challenges, are you confident, somewhat confident, somewhat not confident or not confident in our ability as a nation to find solutions?
 [RANDOMIZE]

Investing in infrastructure such as roads and bridges



Methodology

Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between July 23rd to 26th, 2017, as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

Previous waves:

- A representative online random survey of 1,000 Canadians, conducted from July 5th to 9th, 2012, accurate 3.1 percentage points plus or minus, 19 times out of 20;
- A national RDD dual frame (land- and cell- lines) random telephone survey of 1,013 Canadians conducted between April 6th and 9th, 2013 as part of an omnibus survey. The margin of error for a survey of 1,013 Canadians is ± 3.1 percentage points, 19 times out of 20; and,
- A national RDD dual frame (land- and cell-lines) random telephone survey of 1,000 Canadians conducted between May 24th and May 28th, 2015 as part of an omnibus survey. The margin of error for a survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.
- A national RDD dual frame (land- and cell-lines) random telephone survey of 1,000 Canadians conducted between July 28th and August 1st, 2016, as part of an omnibus survey. The margin of error for a survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

This research was sponsored by Nanos.

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Technical Note

Element	Description	Element	Description
Organization who commissioned the research	Nanos Research.	Weighting of Data	The results were weighted by age and gender using the latest Census information (2014) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Final Sample Size	1000 Randomly selected individuals.	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Margin of Error	±3.1 percentage points, 19 times out of 20.	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines could not participate.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid random telephone and online omnibus survey	Stratification	By age and gender using the latest Census information (2014) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Estimated Response Rate	16 per cent, consistent with industry norms.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct	Question Content	This was the module four of an omnibus survey. Previous modules asked about the top national unprompted issues of concern, the Canadian economy, marijuana regulations, the Canada-US relations, and NAFTA.
Number of Calls	Maximum of five call backs.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Survey Company	Nanos Research
Field Dates	July 23 rd to 26 th , 2017.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanosresearch.com Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.
Language of Survey	The survey was conducted in both English and French.		



Tabulations

Confidential