



2014-563 Banff Forum Summary
submitted by Nanos, September 2014



Executive Summary

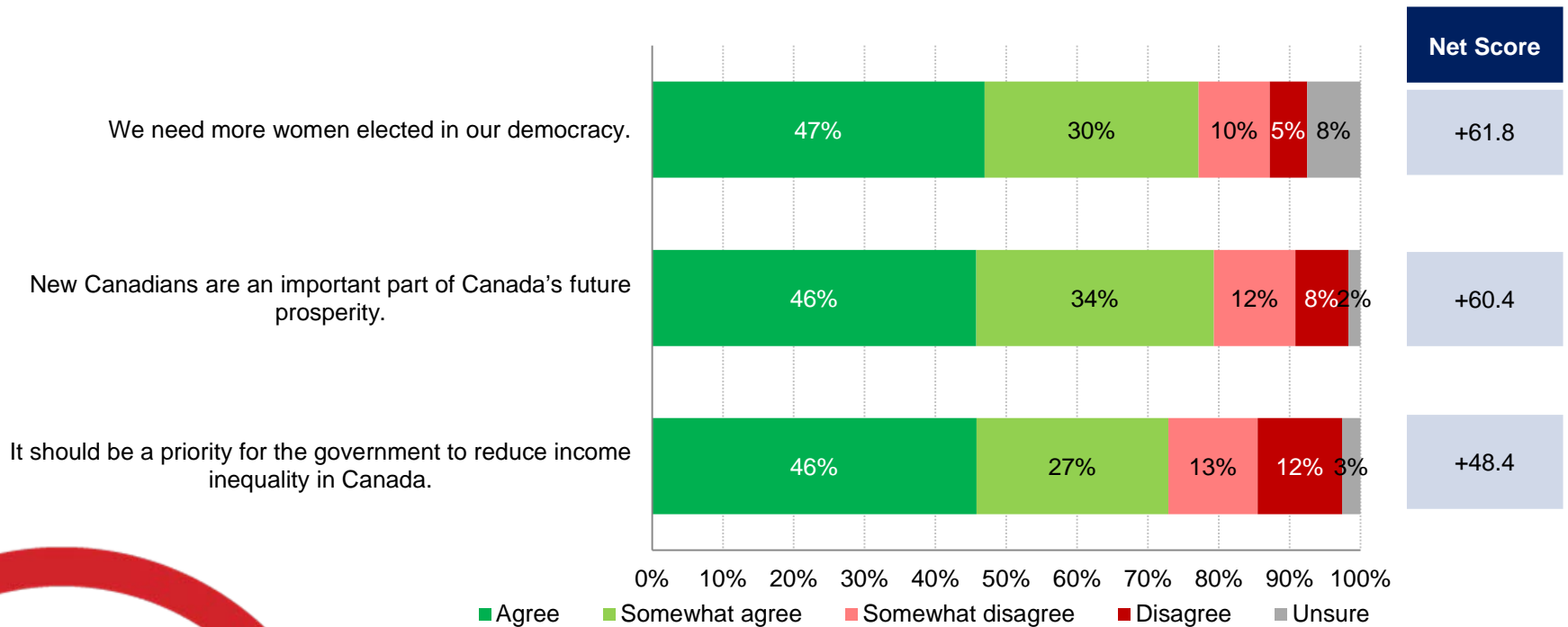
Nanos Research, in partnership with the Banff Forum, conducted a national survey on democracy and economic prosperity. The purpose of the research was to promote dialogue on the future of Canada. Of note, the research suggests that there is a significant angst in terms of economic prosperity.

The key findings of the research include:

- There is an appetite to elect more women in our democracy and a majority believe that women fully participate in our economy;
- New Canadians are seen as an important part of Canada's future prosperity;
- Reducing income inequality is seen as a priority for a comfortable majority of Canadians and a majority of Canadians disagree or somewhat disagree that prosperity is fairly shared in Canada;
- Canadians disagree or somewhat disagree with the statement that Canada has done a good job managing the relationship between First Nations, Métis and Inuit;
- The energy sector is comparatively most likely to be seen as the most important contributor to Canada's prosperity and there has been an increase in the appetite for reducing greenhouse gases.

Factors of Economic and Democratic Prosperity

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 24 to 28, 2014, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

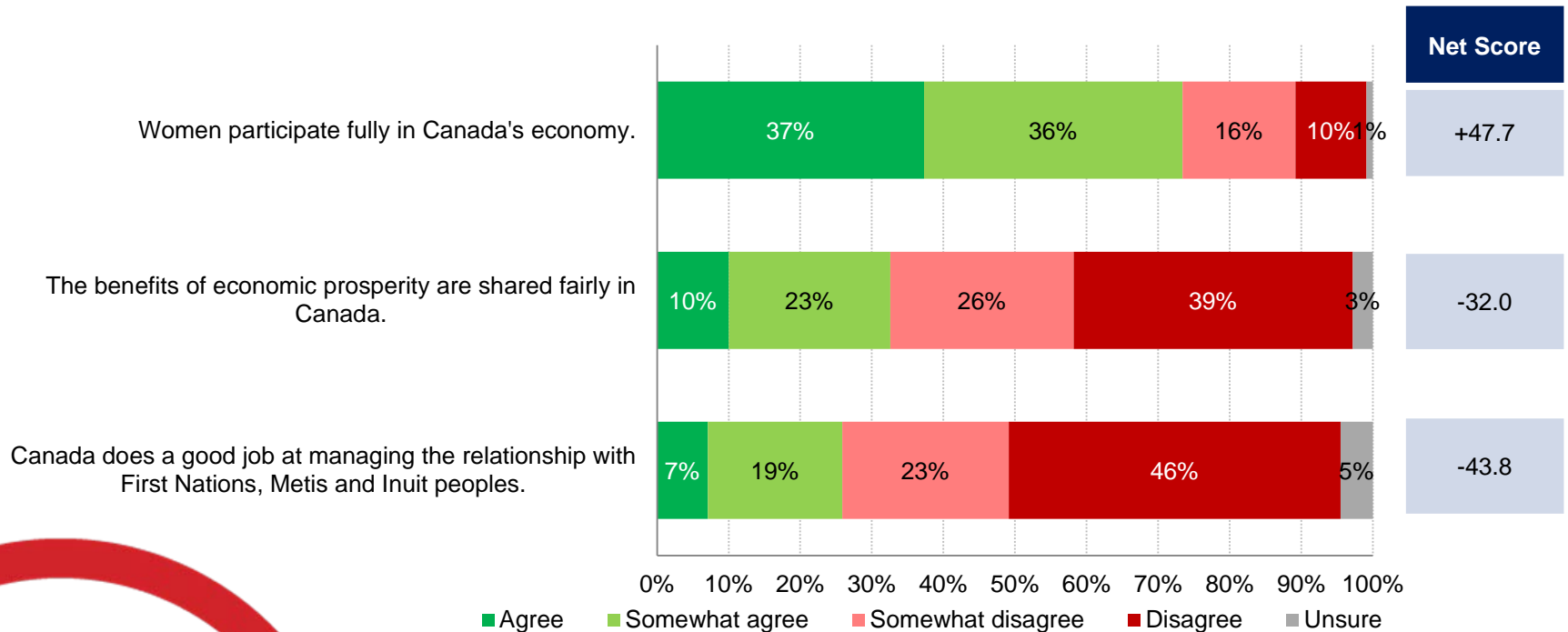


***Note: Charts may not add up to 100 due to rounding**

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

Factors of Economic and Democratic Prosperity

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 24 to 28, 2014, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

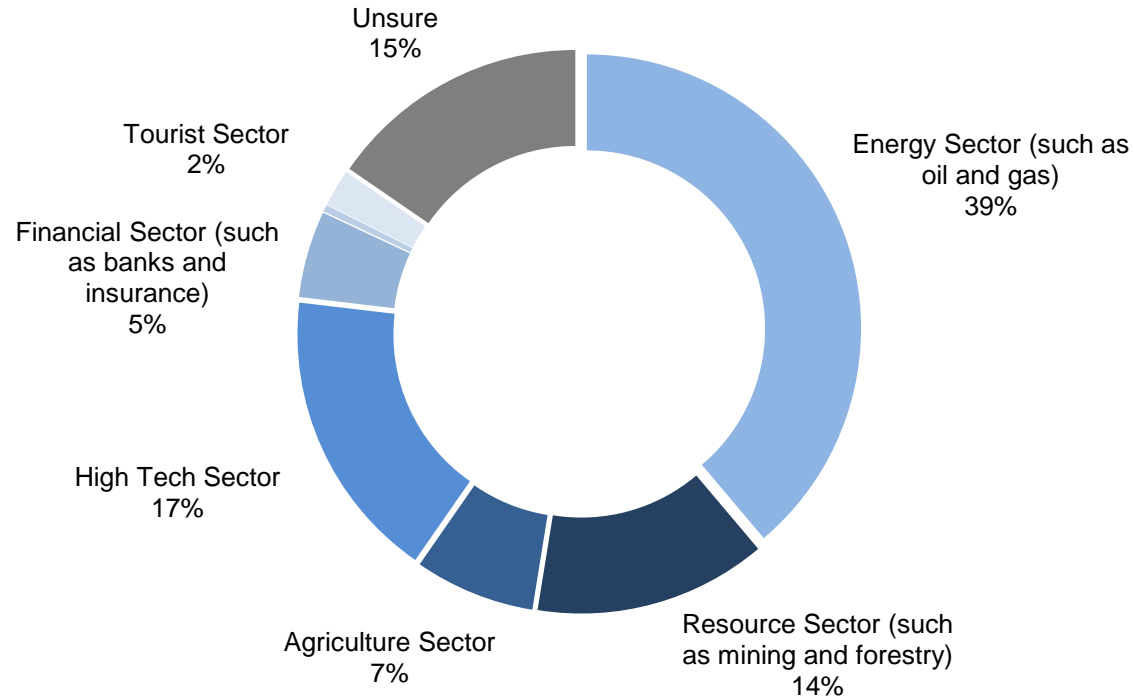


***Note: Charts may not add up to 100 due to rounding**

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

Contributors to Future Prosperity in Canada

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 24 to 28, 2014, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

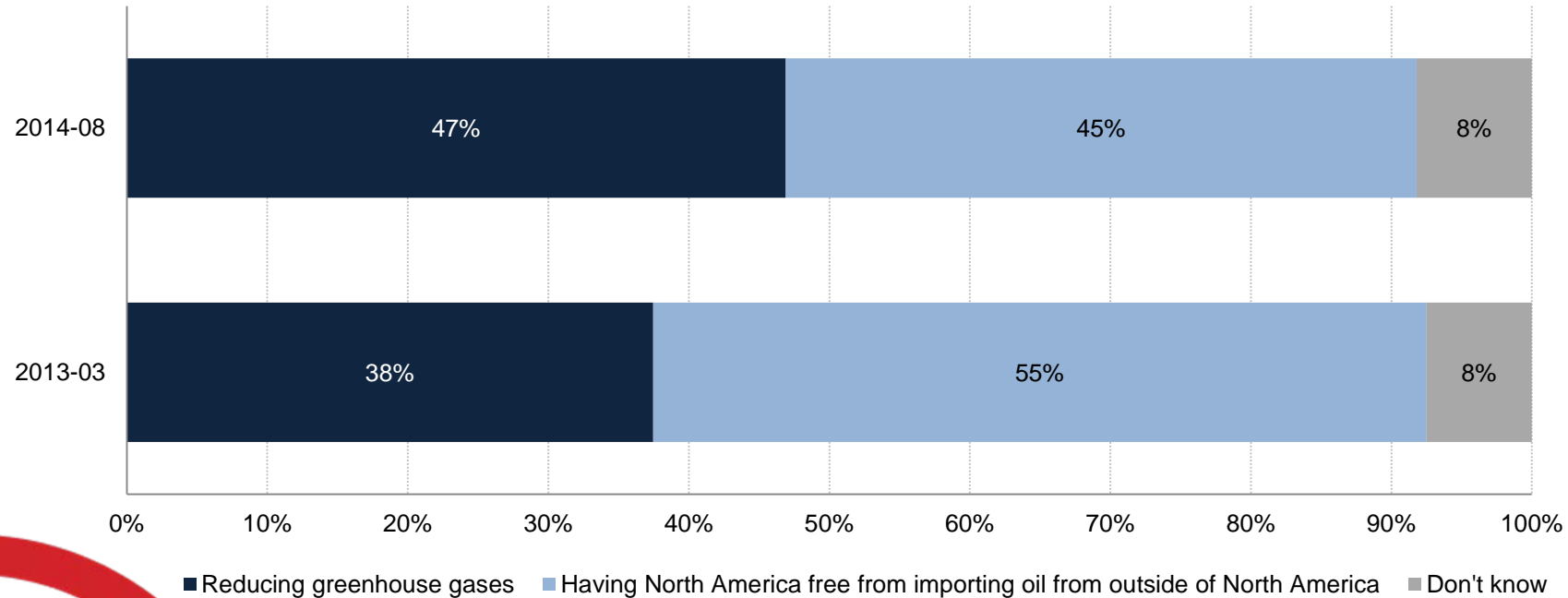


***Note: Charts may not add up to 100 due to rounding**

QUESTION – Please rank the top two sectors in Canada in terms of their contribution to the future prosperity in Canada: [first-ranked response]

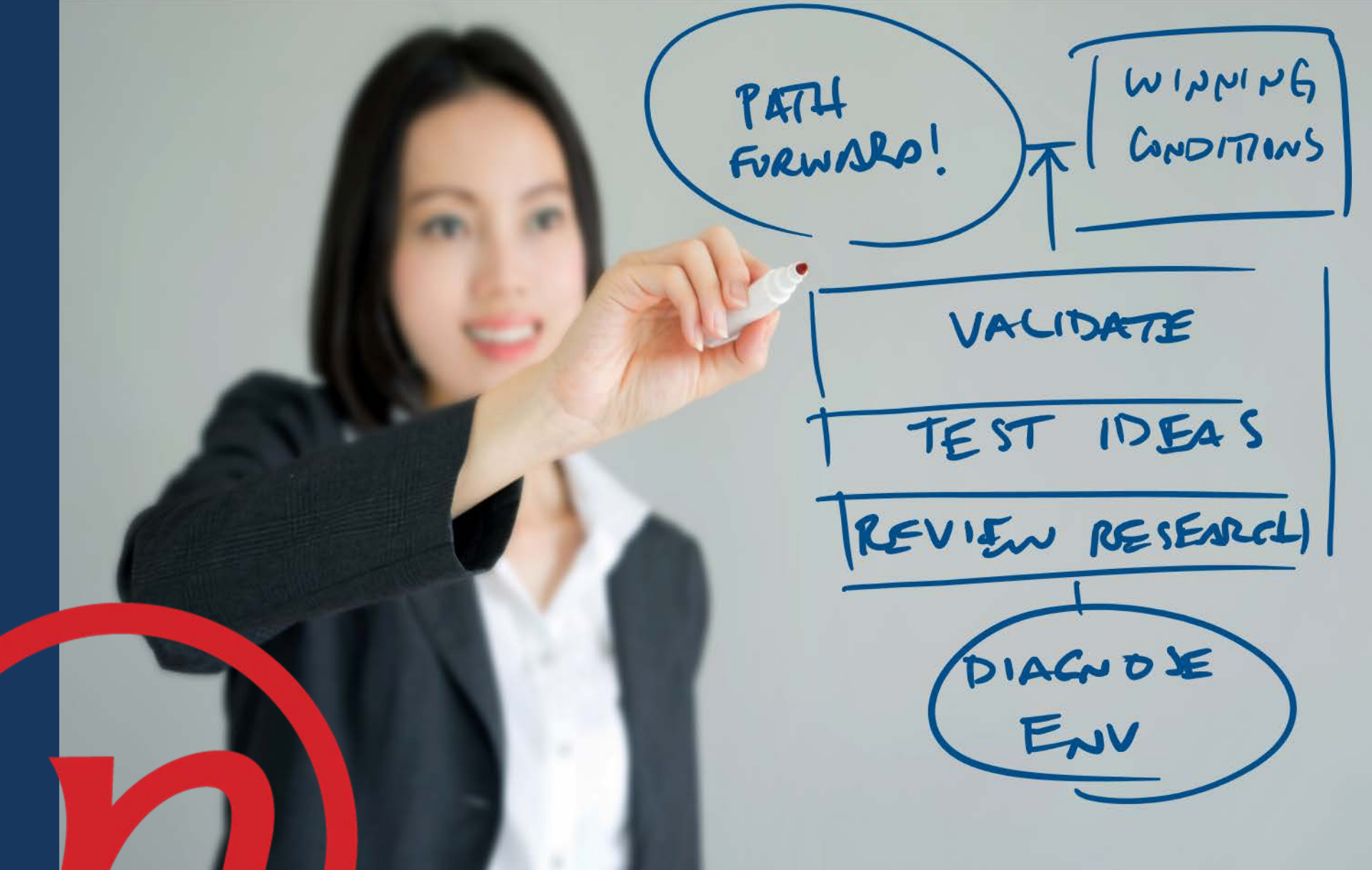
Contributors to Future Prosperity in Canada

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, August 24 to 28, 2014, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

QUESTION – What is more important to you, reducing greenhouse gases or having North America free from importing oil from outside of North America?



Methodology

Methodology

National Nanos conducted a RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between August 24th and 28th, 2014. Participants were randomly recruited by telephone and administered a survey online. 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.

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

The research was conducted in partnership between Nanos Research and the Banff Forum. Any use should refer to the study as a Nanos-Banff Forum survey.



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Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



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Tabulations

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Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

		Question 1 – The benefits of economic prosperity are shared fairly in Canada.					
		Total	Agree	Somewhat agree	Somewhat disagree	Disagree	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2014-08	1000	10.0	22.6	25.6	39.0	2.8
	Atlantic Canada	100	3.4	16.2	26.7	49.4	4.3
	Quebec	250	9.7	26.3	24.4	37.6	1.9
	Ontario	300	11.3	17.5	27.7	41.0	2.5
	Prairies	200	13.8	22.8	28.6	30.7	4.0
	British Columbia	150	7.3	30.8	18.5	41.0	2.4
Gender	Male	488	9.6	25.3	25.7	36.8	2.6
	Female	512	10.4	20.0	25.5	41.0	3.0
Age	18 to 29	205	11.9	30.1	24.9	30.4	2.7
	30 to 39	169	12.8	18.1	28.7	37.8	2.5
	40 to 49	208	10.4	22.3	21.6	42.4	3.3
	50 to 59	178	8.2	20.7	22.2	47.1	1.8
	60 plus	239	7.5	21.0	30.0	38.1	3.4

Nanos conducted a RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between August 24th and 28th, 2014 as part of a Canadian omnibus survey. The sample included both land- and cell-lines across Canada. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

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Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

		Question 2 – Women participate fully in Canada's economy.					
		Total	Agree	Somewhat agree	Somewhat disagree	Disagree	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2014-08	1000	37.3	36.1	15.8	9.9	.9
	Atlantic Canada	100	32.5	33.2	16.9	15.8	1.7
	Quebec	250	37.0	36.9	17.0	8.0	1.1
	Ontario	300	37.9	35.9	16.6	9.4	.2
	Prairies	200	40.5	40.5	10.4	7.8	.9
	British Columbia	150	35.3	30.9	19.1	12.9	1.9
Gender	Male	488	36.3	37.5	16.6	8.0	1.5
	Female	512	38.2	34.6	15.1	11.6	.4
Age	18 to 29	205	46.0	30.4	20.1	3.5	.0
	30 to 39	169	41.8	43.1	7.9	5.2	2.1
	40 to 49	208	37.6	38.6	10.7	12.4	.6
	50 to 59	178	30.8	38.2	18.5	11.8	.7
	60 plus	239	31.1	32.1	20.3	15.1	1.5

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Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

		Question 3 – We need more women elected in our democracy.					
		Total	Agree	Somewhat agree	Somewhat disagree	Disagree	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2014-08	1000	46.9	30.2	10.0	5.3	7.5
	Atlantic Canada	100	56.9	30.2	6.3	3.4	3.2
	Quebec	250	46.8	30.7	11.5	3.6	7.3
	Ontario	300	45.6	32.4	9.3	5.2	7.5
	Prairies	200	46.2	25.6	8.9	9.7	9.6
	British Columbia	150	43.7	31.6	12.9	3.6	8.1
Gender	Male	488	34.8	35.9	14.4	6.6	8.4
	Female	512	58.3	24.9	5.9	4.1	6.8
Age	18 to 29	205	39.8	33.7	8.1	5.6	12.8
	30 to 39	169	54.3	20.4	9.9	6.0	9.5
	40 to 49	208	44.1	31.4	13.5	5.3	5.7
	50 to 59	178	45.3	31.6	9.7	7.2	6.2
	60 plus	239	51.3	32.3	9.0	3.1	4.3

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Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

		Question 4 – New Canadians are an important part of Canada’s future prosperity.					
		Total	Agree	Somewhat agree	Somewhat disagree	Disagree	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2014-08	1000	45.8	33.6	11.5	7.5	1.7
	Atlantic Canada	100	58.2	21.4	11.0	5.0	4.4
	Quebec	250	44.1	38.1	9.6	6.4	1.9
	Ontario	300	44.1	32.9	11.9	10.3	.9
	Prairies	200	49.5	33.1	9.6	5.9	1.9
	British Columbia	150	38.9	36.0	16.7	7.6	.8
Gender	Male	488	43.1	34.2	11.6	9.3	1.8
	Female	512	48.4	32.9	11.4	5.8	1.5
Age	18 to 29	205	43.1	33.3	10.9	10.7	1.9
	30 to 39	169	44.9	36.1	10.6	5.2	3.2
	40 to 49	208	39.7	38.0	13.1	8.5	.8
	50 to 59	178	48.1	29.3	11.4	8.9	2.3
	60 plus	239	52.3	31.3	11.2	4.5	.7

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Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

		Question 5 – It should be a priority for the government to reduce income inequality in Canada.					
		Total	Agree	Somewhat agree	Somewhat disagree	Disagree	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2014-08	1000	45.8	27.1	12.6	11.9	2.6
	Atlantic Canada	100	51.1	33.1	8.8	5.8	1.1
	Quebec	250	47.8	27.5	9.9	12.1	2.6
	Ontario	300	45.3	30.7	10.3	9.5	4.1
	Prairies	200	45.9	21.5	18.2	13.1	1.3
	British Columbia	150	39.9	22.7	16.8	18.6	1.9
Gender	Male	488	42.1	25.4	13.9	16.1	2.5
	Female	512	49.4	28.8	11.4	7.8	2.6
Age	18 to 29	205	44.2	33.5	9.9	12.4	.0
	30 to 39	169	55.8	13.1	14.6	11.6	4.9
	40 to 49	208	43.8	25.9	15.5	11.7	3.1
	50 to 59	178	44.1	28.7	11.7	12.9	2.6
	60 plus	239	43.2	31.5	11.7	11.0	2.6

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Do you agree, somewhat agree, somewhat disagree or disagree with the following statements:

		Question 6 – Canada does a good job at managing the relationship with First Nations, Metis and Inuit peoples.					
		Total	Agree	Somewhat agree	Somewhat disagree	Disagree	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2014-08	1000	7.1	18.8	23.3	46.4	4.5
	Atlantic Canada	100	3.5	17.9	15.5	54.1	8.9
	Quebec	250	6.2	18.4	26.4	43.4	5.6
	Ontario	300	4.4	17.7	19.3	53.3	5.2
	Prairies	200	10.1	22.6	26.9	38.3	2.1
	British Columbia	150	12.0	16.8	26.1	43.5	1.6
Gender	Male	488	6.6	18.6	25.2	46.6	2.9
	Female	512	7.4	18.9	21.5	46.2	6.0
Age	18 to 29	205	10.0	14.9	27.2	40.2	7.7
	30 to 39	169	4.4	25.3	25.3	43.0	2.0
	40 to 49	208	7.5	22.6	24.0	40.3	5.7
	50 to 59	178	7.5	16.4	19.1	54.6	2.5
	60 plus	239	5.7	15.9	20.9	53.5	3.9

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		Question 7 (first ranked response) – Please rank the top two sectors in Canada in terms of their contribution to the future prosperity in Canada								
		Total	Energy Sector (such as oil and gas)	Resource sector (such as mining and forestry)	Agricultural sector	High Tech Sector	Financial Sector (such as banks and insurance)	Retail Sector	Tourist Sector	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada	1000	38.8	13.7	7.1	17.2	5.1	.4	2.2	15.4
	2014-08									
	Atlantic Canada	100	37.7	13.0	8.4	13.6	4.0	.8	4.2	18.3
	Quebec	250	32.6	10.8	5.7	25.2	6.4	.0	2.4	17.0
	Ontario	300	35.9	16.7	6.2	17.3	6.9	.4	2.2	14.5
	Prairies	200	50.6	12.9	9.6	7.1	1.8	.4	.9	16.6
	British Columbia	150	40.3	14.4	7.1	19.8	4.1	.8	2.2	11.2
Gender	Male	488	40.8	12.7	5.8	18.9	4.1	.9	.6	16.3
	Female	512	37.0	14.7	8.3	15.7	6.0	.0	3.7	14.6
Age	18 to 29	205	35.0	15.4	6.6	19.8	5.8	.0	3.0	14.4
	30 to 39	169	43.8	18.2	5.4	18.5	.0	.0	3.1	11.0
	40 to 49	208	44.1	12.3	6.0	13.6	7.6	.0	2.1	14.2
	50 to 59	178	36.0	9.8	9.2	21.9	5.8	.7	2.1	14.4
	60 plus	239	36.1	13.3	8.1	13.9	5.2	1.2	.9	21.3

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		Question 7 (second ranked response) – Please rank the top two sectors in Canada in terms of their contribution to the future prosperity in Canada								
		Total	Energy Sector (such as oil and gas)	Resource sector (such as mining and forestry)	Agricultural sector	High Tech Sector	Financial Sector (such as banks and insurance)	Retail Sector	Tourist Sector	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2014-08	844	19.5	26.8	18.4	14.4	12.8	2.7	5.3	.1
	Atlantic Canada	82	19.0	20.2	14.0	27.1	8.2	6.5	4.1	1.0
	Quebec	206	22.6	30.0	16.7	14.8	10.2	2.0	3.6	.0
	Ontario	256	18.8	24.9	20.8	12.1	16.1	2.7	4.6	.0
	Prairies	167	20.2	26.6	22.4	10.4	13.8	1.8	4.8	.0
	British Columbia	133	15.6	29.8	14.0	15.6	12.2	2.5	10.4	.0
Gender	Male	406	18.0	29.9	16.4	14.7	13.4	2.8	4.6	.2
	Female	437	20.8	23.9	20.2	14.2	12.3	2.6	5.9	.0
Age	18 to 29	176	24.6	37.3	13.9	8.5	9.8	.0	5.8	.0
	30 to 39	151	16.5	21.2	26.3	12.9	16.8	4.1	2.2	.0
	40 to 49	179	17.2	23.8	16.0	18.7	16.0	3.2	5.1	.0
	50 to 59	152	17.0	25.4	19.4	14.9	11.8	5.0	6.4	.0
	60 plus	187	21.3	25.5	17.5	16.8	10.3	1.8	6.4	.4

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		Question 8 – What is more important to you, reducing greenhouse gases or having North America free from importing oil from outside of North America?			
		Total	Reducing greenhouse gases	Having North America free from importing oil from outside of North America	Don't know
		Responses	Percentage	Percentage	Percentage
Region	Canada 2014-08	1000	46.9	44.9	8.2
	Atlantic Canada	100	48.6	40.8	10.5
	Quebec	250	49.9	43.1	6.9
	Ontario	300	47.9	44.5	7.6
	Prairies	200	37.3	52.8	9.9
	British Columbia	150	51.3	40.9	7.8
Gender	Male	488	45.7	47.9	6.4
	Female	512	48.0	42.1	9.9
Age	18 to 29	205	47.4	45.2	7.4
	30 to 39	169	46.7	39.5	13.8
	40 to 49	208	49.8	44.6	5.6
	50 to 59	178	46.9	45.0	8.1
	60 plus	239	43.9	48.8	7.3

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