

Canadians end 2015 in a gloomy economic mood for 2016 – open to deficits in uncertain times but not greater than \$10 billion

Globe and Mail/Nanos Survey released December, 2015

Project 2015-760

THE GLOBE AND MAIL 

 **NANOS SURVEY**



Canadians bearish on personal finances – don't want deficit to exceed \$10 billion

A new survey commissioned by the Globe and Mail and conducted by Nanos Research suggests Canadians will begin 2016 thinking they more likely be worse than better off in the coming year. Canadians are also more likely to think that the economy will be weaker rather than stronger in 2016, are open to deficits if the economy is uncertain but less comfortable about deficits if they exceed \$10 billion.

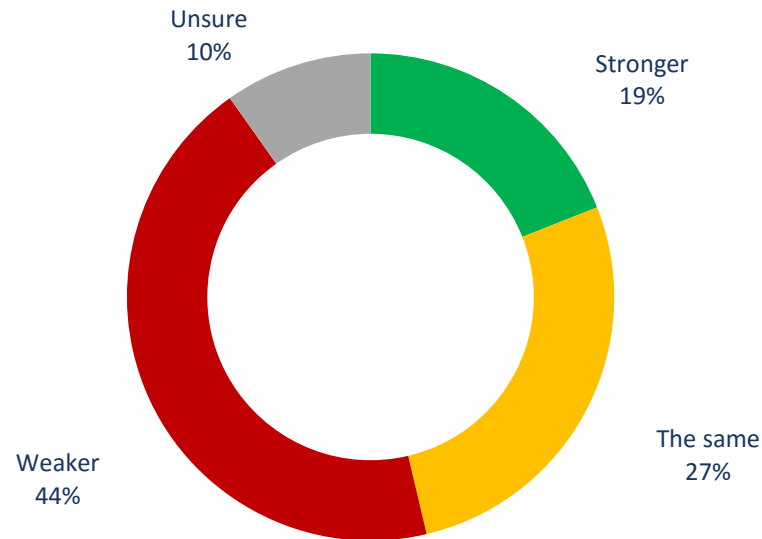
- **Forward view on 2016 economy net negative** – Canadians are net negative when it comes to how strong or weak the economy will be in 2016. Forty-four per cent believe the economy will get weaker while 19 per cent believe it will get stronger – the rest believe it will be the same (27%) or were unsure (10%).
- **Canadians more likely to think they will be worse rather than better off in 2016** – Canadians were much more bearish about their personal finances with twice as many Canadians saying they thought their personal finances would get worse (36%) compared to better (18%). Four in ten (41%) thought there would be no difference and six per cent were unsure.
- **Canadians open to deficits in uncertain times** – A majority of Canadians (52%) supported running a deficit in uncertain times while 27% opposed running a deficit and 14% of Canadians supported running a deficit even if the economy performed well (the rest were unsure).
- **Canadians oppose deficits exceeding \$10 billion** – The intensity of opposition to Liberals running a deficit greater than the estimated \$10 billion deficit mentioned during the federal election campaign was greater than the intensity of support. Thirty three percent opposed having a deficit greater than \$10 billion and another 15% somewhat opposed a larger than \$10 billion deficit (18% supported a larger deficit, 28% somewhat supported a larger deficit and the rest were unsure).
- **Canadians divided on changes to Tax Free Savings Account (TFS)** – Canadians are divided on changes to reduce the amount one can contribute to tax free savings accounts (35% support the reduction, 13% somewhat support, 33% oppose the reduction, 13% somewhat oppose and the rest were unsure).

These observations are based on a hybrid survey commissioned by the Globe and Mail and conducted by Nanos Research. Individuals were randomly recruited (land- and cell-line sample using live agents and the survey was administered online random survey completed between December 18th to 21st, 2015. It was comprised of 1,000 Canadians. A random survey of 1000 Canadians is accurate 3.1 percentage points plus or minus, 19 times out of 20.

Thoughts on the economy

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, December 18th to 21st, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
-25



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

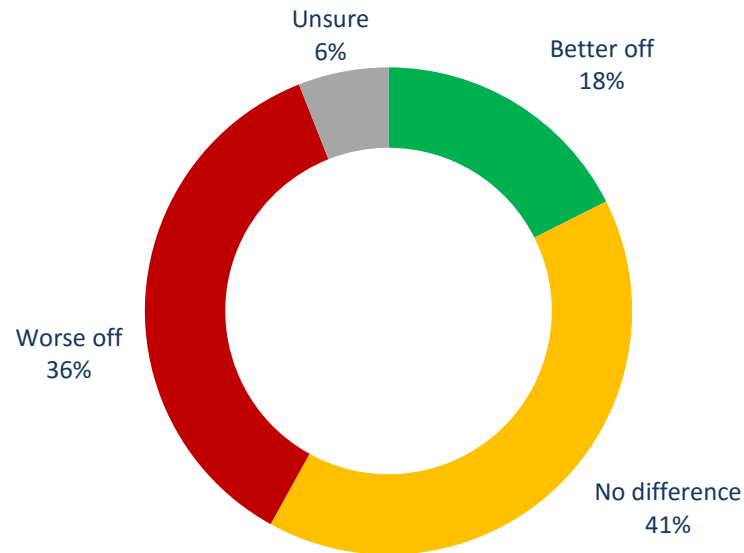
Subgroups	Stronger
Atlantic (n=100)	18.9%
Quebec (n=250)	16.6%
Ontario (n=300)	19.4%
Prairies (n=200)	17.9%
British Columbia (n=150)	23.5%
Male (n=500)	18.6%
Female (n=500)	19.4%
18 to 29 (n=206)	23.3%
30 to 39 (n=169)	19.8%
40 to 49 (n=208)	16.6%
50 to 59 (n=178)	18.2%
60 plus (n=239)	17.3%

QUESTION – In general do you think the Canadian economy will be stronger, weaker or the same next year in 2016 compared to 2015?

Better or worse off in 2015

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, December 18th to 21st, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
-18.4



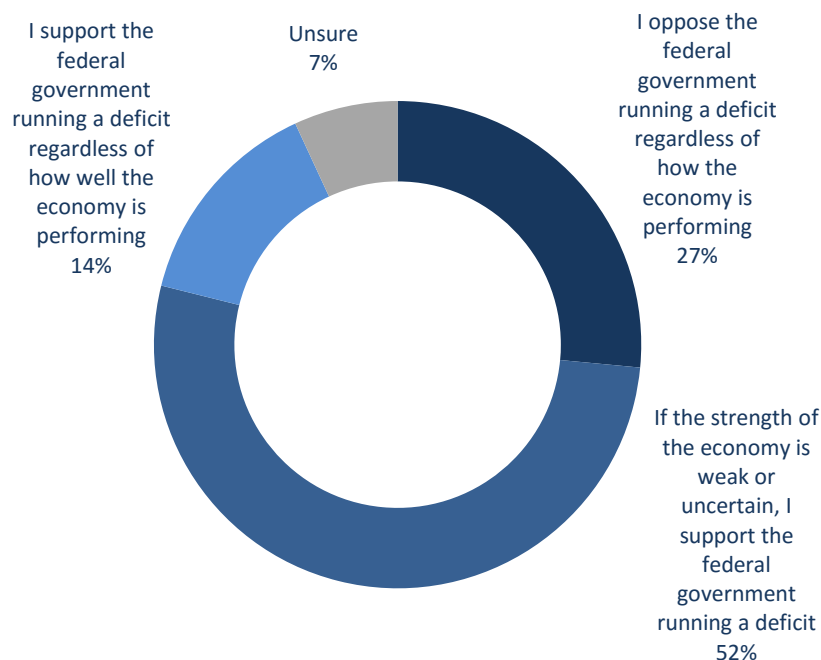
*Note: Charts may not add up to 100 due to rounding

Subgroups	Better off
Atlantic (n=100)	18.3%
Quebec (n=250)	14.8%
Ontario (n=300)	18.9%
Prairies (n=200)	13.1%
British Columbia (n=150)	25.0%
Male (n=500)	18.2%
Female (n=500)	16.9%
18 to 29 (n=206)	30.1%
30 to 39 (n=169)	26.6%
40 to 49 (n=208)	15.4%
50 to 59 (n=178)	11.2%
60 plus (n=239)	7.0%

QUESTION – Do you think that, financially, you will be better off, worse off or that there will be no difference next year in 2016 compared to 2015?

Canadian economy

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, December 18th to 21st, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



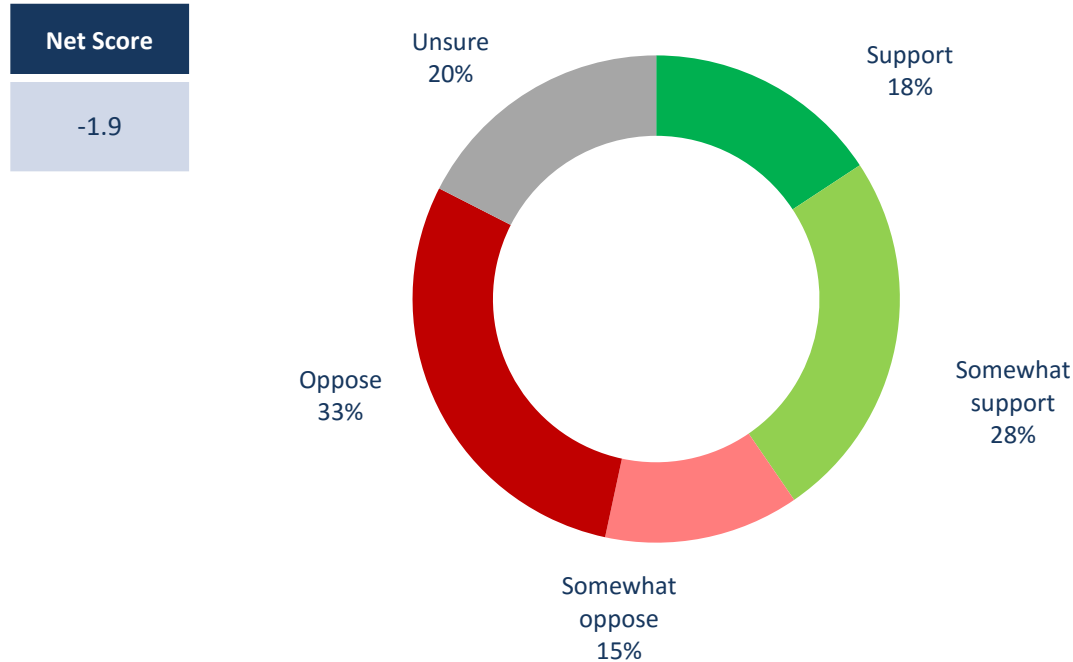
*Note: Charts may not add up to 100 due to rounding

Subgroups	Support deficit if economy weak or uncertain
Atlantic (n=100)	58.6%
Quebec (n=250)	56.0%
Ontario (n=300)	54.2%
Prairies (n=200)	48.0%
British Columbia (n=150)	44.8%
Male (n=500)	53.2%
Female (n=500)	51.7%
18 to 29 (n=206)	52.6%
30 to 39 (n=169)	51.6%
40 to 49 (n=208)	49.6%
50 to 59 (n=178)	54.6%
60 plus (n=239)	53.8%

QUESTION – Which of the following statements best reflects your personal view [ROTATE]:

Federal deficit to stimulate economy

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, December 18th to 21st, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



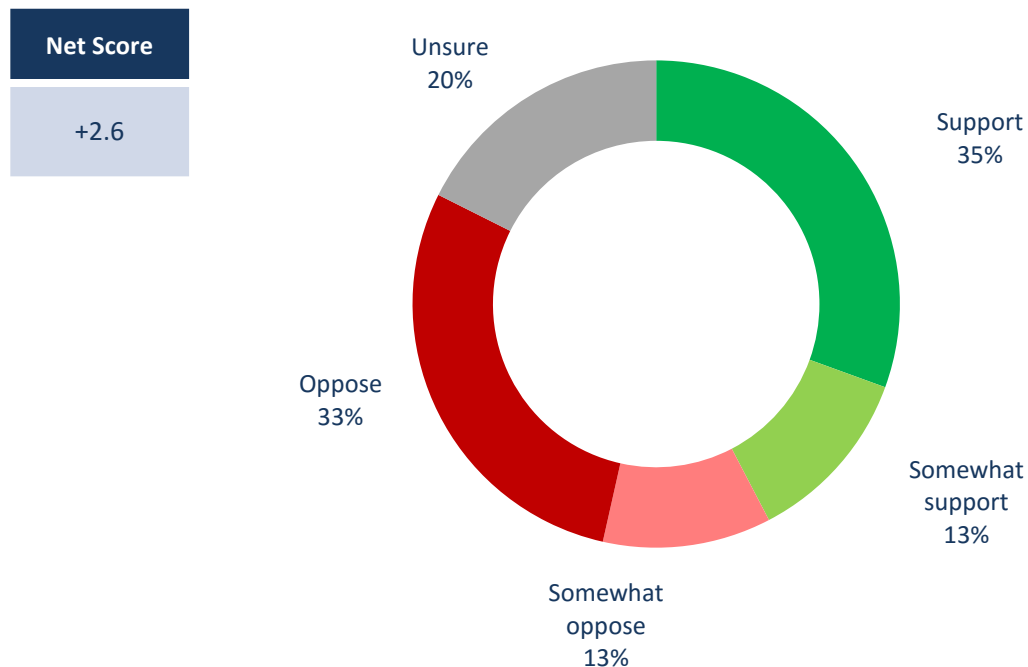
*Note: Charts may not add up to 100 due to rounding

Subgroups	Support/ somewhat support
Atlantic (n=100)	62.6%
Quebec (n=250)	43.3%
Ontario (n=300)	43.6%
Prairies (n=200)	42.5%
British Columbia (n=150)	50.2%
Male (n=500)	45.6%
Female (n=500)	46.9%
18 to 29 (n=206)	43.3%
30 to 39 (n=169)	44.7%
40 to 49 (n=208)	45.5%
50 to 59 (n=178)	47.8%
60 plus (n=239)	49.1%

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the federal government running a deficit greater than the government’s promised \$10-billion deficit plan to help stimulate the economy?

Liberal Tax-Free Savings Account policy

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, December 18th to 21st, 2015, 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

Subgroups	Support/ somewhat support
Atlantic (n=100)	65.1%
Quebec (n=250)	50.1%
Ontario (n=300)	46.4%
Prairies (n=200)	41.4%
British Columbia (n=150)	45.2%
Male (n=500)	49.7%
Female (n=500)	46.4%
18 to 29 (n=206)	46.2%
30 to 39 (n=169)	44.2%
40 to 49 (n=208)	44.1%
50 to 59 (n=178)	50.0%
60 plus (n=239)	54.4%

QUESTION – As you may know, prior to the election the Conservatives raised the amount one could contribute to a Tax Free Savings Account from \$5,500 to \$10,000. The Liberals have moved to return the maximum contribution back to \$5,500. Do you support, somewhat support, somewhat oppose or oppose the Liberals setting the amount one can contribute to a TFSA back to \$5,500 a year?



Methodology

THE GLOBE AND MAIL



 **NANOS SURVEY**

Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between December 18th and 21st, 2015 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 were 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 research was commissioned by The Globe and Mail.

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

About Nanos

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.



View our brochure

Nik Nanos FMRIA

Chairman, Nanos Research Group
Ottawa (613) 234-4666 ext. 237
Washington DC (202) 697-9924
nnanos@nanosresearch.com

Richard Jenkins

Vice President, Nanos Research
Ottawa (613) 234-4666 ext. 230
rjenkins@nanosresearch.com



Technical Note

Element	Description
Organization who commissioned the research	The Globe and Mail
Final Sample Size	1000 Randomly selected individuals.
Margin of Error	±3.1 percentage points, 19 times out of 20.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online [omnibus] survey
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.
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.
Demographics (Other)	Age, gender, education, income
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct
Number of Calls	Maximum of five call backs.
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.
Field Dates	December 18 th to 21 st , 2015
Language of Survey	The survey was conducted in both English and French.

Element	Description
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
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.
Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines could not participate.
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.
Estimated Response Rate	Eleven percent, consistent with industry norms.
Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Question Content	This was module five of an omnibus survey. The modules preceding these questions included top unprompted national issues of concern, vote preferences, refugee and federal government performance questions.
Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Survey Company	Nanos Research
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.





Tabulations

THE GLOBE AND MAIL 

 **NANOS SURVEY**



2015-760 – Globe and Mail December - STAT SHEET

Question 1 – In general do you think the Canadian economy will be stronger, weaker or the same next year in 2016 compared to 2015?

Question 2: In general, do you think the Canadian economy will be stronger, weaker or the same next year in 2020 compared to 2019?															
			Region					Gender		Age					
			Canada 2015-12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
	Total	Unwgt N	1000	100	250	300	200	150	500	500	127	139	187	267	280
		Wgt N	1000	100	250	300	200	150	500	500	206	169	208	178	239
	Stronger	%	19.0	18.9	16.6	19.4	17.9	23.5	18.6	19.4	23.3	19.8	16.6	18.2	17.3
	Weaker	%	43.9	33.0	41.1	42.3	56.8	42.2	50.6	37.3	43.4	42.4	47.5	42.6	43.4
	The same	%	27.3	40.9	31.0	28.4	19.6	20.4	23.8	30.9	25.8	27.6	27.7	28.8	27.1
	Unsure	%	9.8	7.2	11.3	9.9	5.7	14.0	7.0	12.5	7.5	10.2	8.2	10.3	12.3

Question 2 – Do you think that, financially, you will be better off, worse off or that there will be no difference next year in 2016 compared to 2015?

			Region					Gender		Age					
			Canada 2015-12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
	Total	Unwgt N	1000	100	250	300	200	150	500	500	127	139	187	267	280
		Wgt N	1000	100	250	300	200	150	500	500	206	169	208	178	239
	Better off	%	17.6	18.3	14.8	18.9	13.1	25.0	18.2	16.9	30.1	26.6	15.4	11.2	7.0
	Worse off	%	36.0	29.3	34.9	35.1	45.5	31.2	35.9	36.1	30.3	29.8	39.5	36.6	41.7
	No difference	%	40.5	44.8	45.3	40.2	33.0	40.0	40.6	40.4	32.3	38.1	40.5	48.2	43.5
	Unsure	%	6.0	7.6	5.0	5.7	8.3	3.8	5.3	6.6	7.3	5.5	4.6	4.0	7.8

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between December 18th and 21st, 2015. 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.

www.nanosresearch.com



2015-760 – Globe and Mail December - STAT SHEET

Question 3 – Which of the following statements best reflects your personal view? [ROTATE]

		Region						Gender		Age				
		Canada 2015-12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Total	Unwgt N	1000	100	250	300	200	150	500	500	127	139	187	267	280
	Wgt N	1000	100	250	300	200	150	500	500	206	169	208	178	239
I oppose the federal government running a deficit regardless of how the economy is performing	%	26.5	17.0	22.9	27.0	35.7	25.4	29.9	23.0	24.1	27.2	32.7	23.3	24.8
If the strength of the economy is weak or uncertain, I support the federal government running a deficit	%	52.4	58.6	56.0	54.2	48.0	44.8	53.2	51.7	52.6	51.6	49.6	54.6	53.8
I support the federal government running a deficit regardless of how well the economy is performing	%	14.2	16.7	17.8	11.1	9.9	18.9	12.9	15.6	13.6	16.0	11.0	16.7	14.5
Unsure	%	6.9	7.7	3.4	7.7	6.4	10.9	4.0	9.7	9.7	5.1	6.6	5.4	6.9

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between December 18th and 21st, 2015. 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.

www.nanosresearch.com



2015-760 – Globe and Mail December - STAT SHEET

Question 4 – Do you support, somewhat support, somewhat oppose or oppose the federal government running a deficit greater than the government's promised \$10-billion deficit plan to help stimulate the economy?

			Region					Gender		Age					
			Canada 2015-12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
	Total	Unwgt N	1000	100	250	300	200	150	500	500	127	139	187	267	280
		Wgt N	1000	100	250	300	200	150	500	500	206	169	208	178	239
	Support	%	18.0	22.7	15.4	18.4	13.6	24.5	20.9	15.2	16.5	18.2	15.6	20.3	19.7
	Somewhat support	%	28.2	39.9	27.9	25.2	28.9	25.7	24.7	31.7	26.8	26.5	29.9	27.5	29.4
	Somewhat oppose	%	14.8	11.2	21.0	12.2	12.6	14.6	12.9	16.6	14.7	15.3	14.6	17.0	12.9
	Oppose	%	33.3	21.6	29.5	36.7	39.6	32.2	36.7	29.9	33.8	33.4	35.4	31.4	32.5
	Unsure	%	5.7	4.5	6.1	7.4	5.2	3.0	4.8	6.6	8.2	6.6	4.4	3.7	5.5

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between December 18th and 21st, 2015. 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.

www.nanosresearch.com



2015-760 – Globe and Mail December - STAT SHEET

Question 5 – As you may know, prior to the election the Conservatives raised the amount one could contribute to a Tax Free Savings Account from \$5,500 to \$10,000. The Liberals have moved to return the maximum contribution back to \$5,500. Do you support, somewhat support, somewhat oppose or oppose the Liberals setting the amount one can contribute to a TFSA back to \$5,500 a year?

		Region						Gender		Age				
		Canada 2015-12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Total	Unwgt N	1000	100	250	300	200	150	500	500	127	139	187	267	280
	Wgt N	1000	100	250	300	200	150	500	500	206	169	208	178	239
Support	%	34.7	47.5	36.2	33.5	31.2	30.6	37.8	31.6	34.5	31.0	31.4	37.7	38.1
Somewhat support	%	13.4	17.6	13.9	12.9	10.2	14.6	11.9	14.8	11.7	13.2	12.7	12.3	16.3
Somewhat oppose	%	12.7	10.6	15.3	10.6	11.0	16.1	11.0	14.4	12.1	13.1	14.6	11.8	11.8
Oppose	%	32.8	17.8	30.1	35.2	41.5	30.7	33.7	31.8	31.1	34.6	34.8	34.0	30.2
Unsure	%	6.5	6.5	4.5	7.7	6.1	7.9	5.6	7.4	10.5	8.0	6.5	4.2	3.6

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between December 18th and 21st, 2015. 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.

www.nanosresearch.com