

Canadian economic mood remains stable

ANALYSIS

While there were no significant changes in the overall economic mood, the Nanos Expectations Index rose for the first time since April 2012.

BACKGROUND

Nanos Economic Mood Index

The Nanos Economic Mood Index is based on a series of questions related to the economy among Canadian adults 18 years of age and older.

Nanos Pocketbook Index

The Nanos Pocketbook Index captures views related to job security and how a consumer's personal financial situation has changed in the past year.

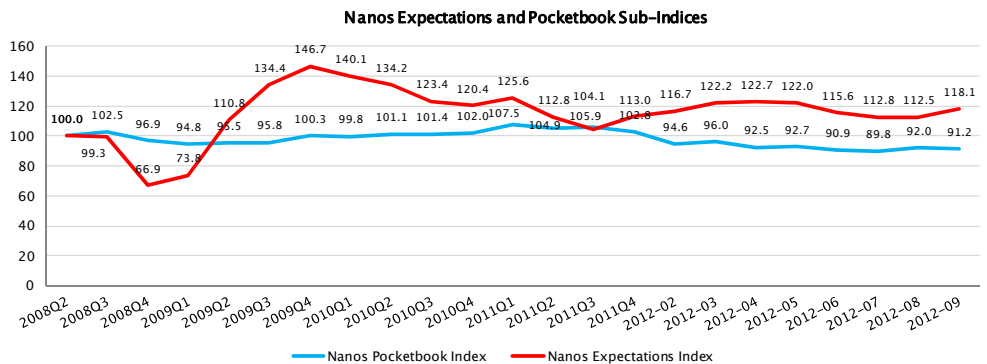
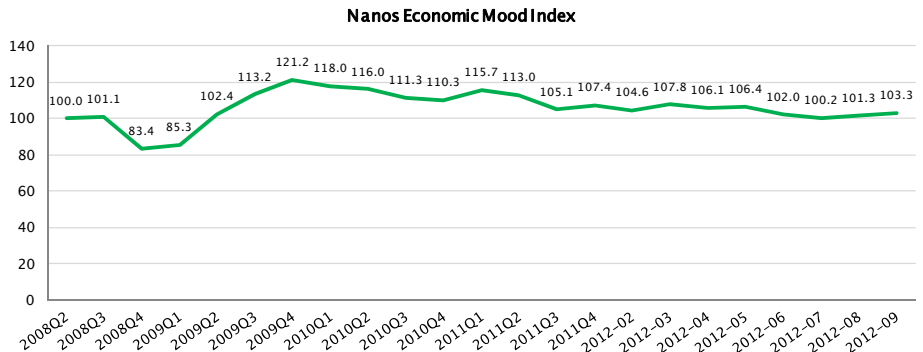
Nanos Expectations Index

The Nanos Expectations Index is based on the direction consumers see the economy going in terms of strength as well as weakness and perceptions related to the expected value of real estate in their neighborhood.

For more background please refer to the methodology.

The current wave is based on a representative random sample of 1,000 Canadians, conducted online by Nanos Research between September 10th and 11th, 2012.

All references or use of this data must cite Nanos Research as the source.



ABOUT NANOS

Nanos Research is one of Canada's most trusted research organizations. Our team of professionals provides to our client the latest quantitative and qualitative techniques in order to deliver superior intelligence and market advantage. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups.

Whether it is understanding customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.

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Economic Index – Tables

METHODOLOGY

The Nanos Economic Mood Index is based on a series of questions related to the economy posed to Canadian adults 18 years of age and older. It is a composite of the Nanos Expectation Index which tracks forward looking perceptions and the Nanos Pocketbook Index which tracks the economic impact of the past year. Factoring these two views, the Nanos Economic Mood Index provides an understanding of consumer sentiment.

The index scores are calculated using the base first wave of tracking of 2008–02. The base data point is assigned a value of 100 and subsequent waves reflect the changes in index values relative to the base wave of research.

The current wave is based on a representative random sample of 1,000 Canadians, conducted online by Nanos Research between September 10th and 11th, 2012.

The data has been weighted using the latest Census results to ensure that the final sample group is representative of the Canadian populace and is believed to be a true reflection of Canadian opinion at the time of the research.

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Time Series Tables

	Pocketbook Index	Expectations Index	Economic Mood Index
2012-09	91.2	118.1	103.3
2012-08	92.0	112.5	101.3
2012-07	89.8	112.8	100.2
2012-06	90.9	115.6	102.0
2012-05	92.7	122.0	106.4
2012-04	92.5	122.7	106.1
2012-03	96.0	122.2	107.8
2012-02	94.6	116.7	104.6
2011-12	102.8	113.0	107.4
2011-09	105.9	104.1	105.1
2011-06	104.9	112.8	113.0

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Canadians still flat on future strength of economy

ANALYSIS

After three months of having negative views, Canadians are now more likely to have a positive view of the strength of the economy.

METHODOLOGY

Perception tracking related to the strength of the economy is based on the following question: In the next six months, do you think the Canadian economy will become stronger, weaker or will there be no change?

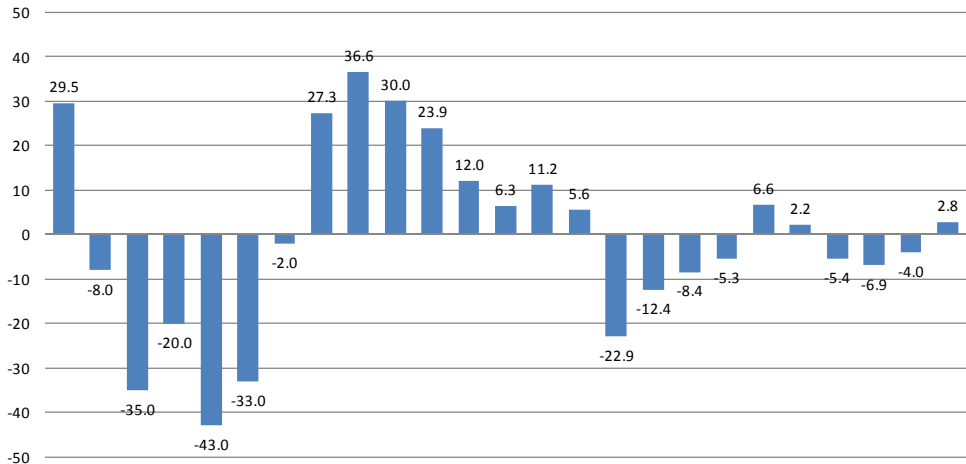
Net scores are calculated factoring the difference between those that believe that the economy will get stronger in the next six months less those that believe the economy will become weaker in the next six months.

The current wave is based on a representative random sample of 1,000 Canadians, conducted online by Nanos Research between September 10th and 11th, 2012.

The data has been weighted using the latest Census results to ensure that the final sample group is representative of the Canadian populace and is believed to be a true reflection of Canadian opinion at the time of the research.

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Net Perception of Strength of Canadian Economy Next Six Months (as of September 11, 2012)



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Strength of Economy – Tables

METHODOLOGY

Perception tracking related to the strength of the economy is based on the following question: In the next six months, do you think the Canadian economy will become stronger, weaker or will there be no change?

Net scores are calculated factoring the difference between those that believe that the economy will get stronger in the next six months less those that believe the economy will become weaker in the next six months.

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Perceptions of Strength of Economy by Region and Age

	2012-03	2012-04	2012-05	2012-06	2012-07	2012-08	2012-09
Canada	-5.3	+6.6	+2.2	-5.4	-6.9	-4.0	+2.8
Region							
Atlantic	-10.2	+10.9	+5.6	-28.2	-20.4	-23.2	-7.8
Quebec	-25.2	-8.3	-10.5	-9.6	-11.2	-9.9	-5.7
Ontario	-5.7	+4.1	+6.7	-5.2	-10.7	-8.9	+5.2
Prairies	+20.0	+23.4	+15.7	+15.3	+7.3	+16.8	+14.9
British Columbia	-3.1	+11.1	-5.8	-11.3	-1.8	+0.6	+2.4
Age							
18-29	+0.7	+18.5	+3.1	-3.2	+5.7	+15.8	+7.5
30-39	-4.8	+12.4	+1.7	-0.7	-1.5	-0.7	+0.2
40-49	-8.0	0	+6.1	+2.3	-6.0	-13.6	-2.4
50-59	-0.5	-7.1	+1.3	-4.7	-14.1	-16.5	+0.3
60 plus	-13.4	+8.2	-1.1	-18.3	-17.0	-5.8	+6.7

* Net scores are calculated factoring the difference between positive minus negative.

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Perceptions of personal finances remain unchanged

ANALYSIS

Canadians' perceptions of their personal finances remained essentially unchanged over the last month. They are still more likely to say that their personal finances are worse off than a year ago.

METHODOLOGY

Perception tracking related to the personal finances of Canadians is based on the following question: Thinking of your personal finances, are you better off, worse off or has there been no change over the past year?

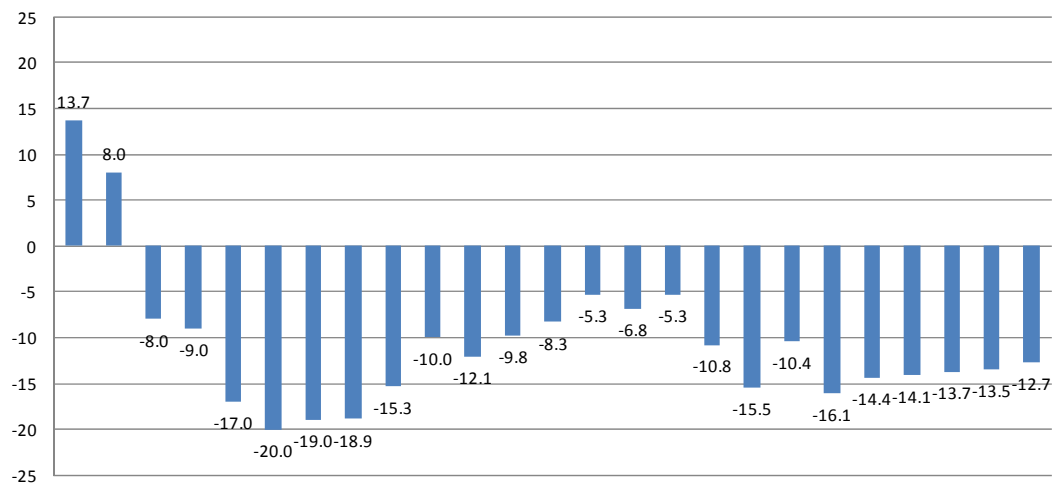
Net scores are calculated factoring the difference between those that believe that they are better off less those that believe they are worse off compared to a year ago.

The current wave is based on a representative random sample of 1,000 Canadians, conducted online by Nanos Research between September 10th and 11th, 2012.

The data has been weighted using the latest Census results to ensure that the final sample group is representative of the Canadian populace and is believed to be a true reflection of Canadian opinion at the time of the research.

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Net Perception of Change in Personal Finances over Past Year (as of September 11, 2012)



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Personal Finances – Tables

METHODOLOGY

Perception tracking related to the personal finances of Canadians is based on the following question: Thinking of your personal finances, are you better off, worse off or has there been no change over the past year?

Net scores are calculated factoring the difference between those that believe that they are better off less those that believe they are worse off compared to a year ago.

The current wave is based on a representative random sample of 1,000 Canadians, conducted online by Nanos Research between September 10th and 11th, 2012.

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Perceptions of Change in Personal Finances by Region and Age

	2012-03	2012-04	2012-05	2012-06	2012-07	2012-08	2012-09
Canada	-10.4	-16.1	-14.4	-14.1	-13.7	-13.5	-12.7
Region							
Atlantic	-12.2	-21.1	-15.9	-33.3	-29.5	-34.3	-20.6
Quebec	-4.4	-12.2	-13.5	-8.4	-6.2	-17.4	-20.9
Ontario	-13.2	-17.6	-18.8	-17.4	-14.8	-10.9	-10.5
Prairies	-7.8	-7.7	-5.5	-8.6	-9.6	-0.6	-5.5
British Columbia	-16.6	-27.5	-18.6	-12.0	-18.4	-15.4	-19.3
Age							
18-29	+1.6	+1.2	-1.8	-2.2	+4.0	+5.1	+6.9
30-39	-6.2	-6.3	+0.4	-2.2	+1.4	-3.5	-3.6
40-49	-17.2	-18.1	-12.2	-5.0	-20.7	-13.8	-18.8
50-59	-15.2	-39.3	-19.5	-25.6	-22.5	-27.1	-23.3
60 plus	-14.7	-19.1	-34.6	-32.8	-27.1	-26.4	-22.9

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Small increase in real estate views

ANALYSIS

Net perceptions of real estate value remain positive and have increased for the first time in six months.

METHODOLOGY

Perception tracking related to the value of real estate is based on the following question: In the next six months, do you believe that the value of real estate in your neighbourhood will increase, stay the same or decrease?

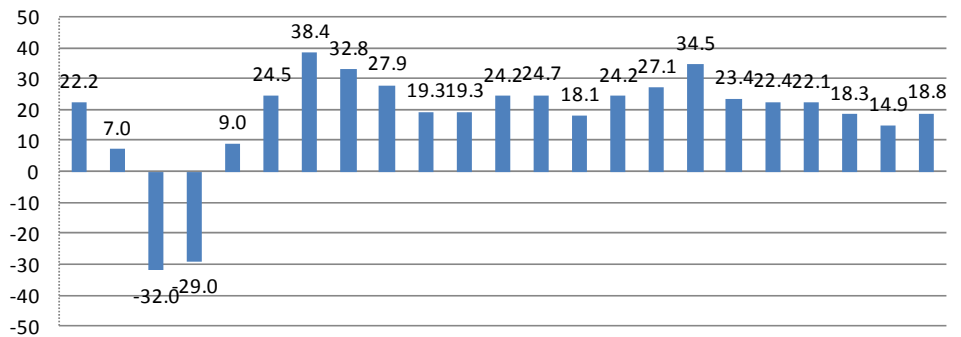
Net scores are calculated factoring the difference between those that believe that the value of real estate in their neighbourhood will increase in next six months less those that believe it will decrease in the next six months.

The current wave is based on a representative random sample of 1,000 Canadians, conducted online by Nanos Research between September 10th and 11th, 2012.

The data has been weighted using the latest Census results to ensure that the final sample group is representative of the Canadian populace and is believed to be a true reflection of Canadian opinion at the time of the research.

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Net Perception of Real Estate Value Next Six Months (as of September 11, 2012)



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Real Estate Value – Tables

METHODOLOGY

Perception tracking related to the value of real estate is based on the following question: In the next six months, do you believe that the value of real estate in your neighbourhood will increase, stay the same or decrease?

Net scores are calculated factoring the difference between those that believe that the value of real estate in their neighbourhood will increase in next six months less those that believe it will decrease in the next six months.

The current wave is based on a representative random sample of 1,000 Canadians, conducted online by Nanos Research between September 10th and 11th, 2012.

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Perceptions of Real Estate Value by Region and Age

	2012-03	2012-04	2012-05	2012-06	2012-07	2012-08	2012-09
Canada	+34.5	+23.4	+22.4	+22.1	+18.3	+14.9	+18.8
Region							
Atlantic	+27.8	+18.3	+21.8	+15.7	+20.6	+14.2	+16.9
Quebec	+37.8	+18.6	+23.9	+24.4	+24.0	+25.2	+10.8
Ontario	+34.6	+26.3	+28.6	+25.6	+15.2	+6.2	+26.9
Prairies	+44.8	+29.3	+22.0	+27.6	+27.7	+29.8	+32.3
British Columbia	+20.2	+21.1	+8.8	+7.9	+0.8	-3.8	-1.2
Age							
18-29	+46.5	+21.3	+24.1	+30.4	+30.9	+29.4	+27.9
30-39	+26.7	+29.7	+17.6	+28.2	+20.5	+20.4	+18.6
40-49	+32.9	+16.8	+17.2	+14.9	+12.8	+7.0	+17.9
50-59	+31.2	+20.5	+21.8	+20.5	+19.1	+12.8	+18.8
60 plus	+36.1	+28.5	+29.6	+17.7	+9.9	+6.8	+11.6

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Small dip in job security perceptions

ANALYSIS

Except for the Atlantic, all regions in Canada experienced a decline in job security perceptions over the last month.

METHODOLOGY

Perception tracking related to job security is based on the following question: Would you describe your job, at this time, as secure, somewhat secure, somewhat not secure or not at all secure?

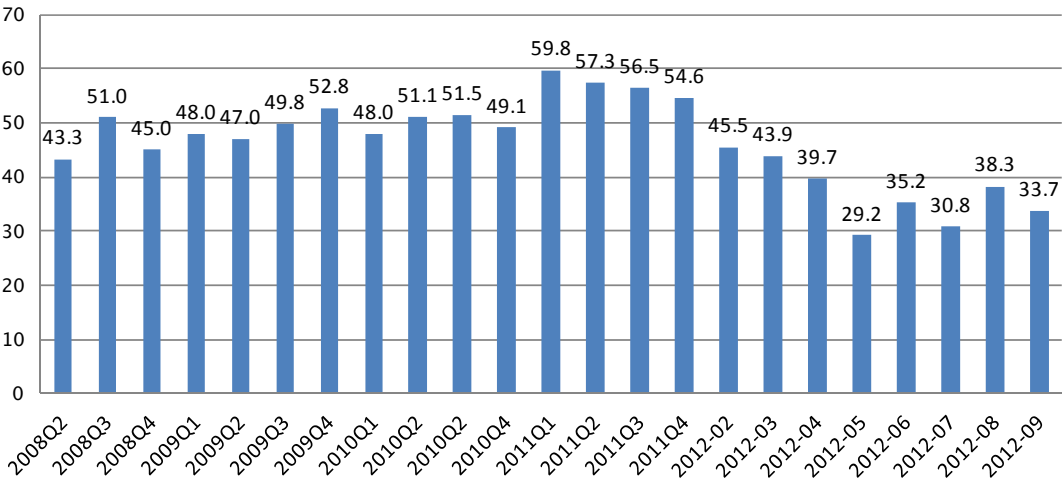
Net scores are calculated factoring the difference between those who believe their jobs are currently secure or somewhat secure less those who believe their jobs are currently somewhat not secure or not at all secure.

The current wave is based on a representative random sample of 1,000 Canadians, conducted online by Nanos Research between September 10th and 11th, 2012.

The data has been weighted using the latest Census results to ensure that the final sample group is representative of the Canadian populace and is believed to be a true reflection of Canadian opinion at the time of the research.

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**Net Perception of Job Security
(as of September 11, 2012)**



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Job security – Tables

METHODOLOGY

Perception tracking related to job security is based on the following question: Would you describe your job, at this time, as secure, somewhat secure, somewhat not secure or not at all secure?

Net scores are calculated factoring the difference between those who believe their jobs are currently secure or somewhat secure less those who believe their jobs are currently somewhat not secure or not at all secure.

The current wave is based on a representative random sample of 1,000 Canadians, conducted online by Nanos Research between September 11th and 12th, 2012.

The data has been weighted using the latest Census results to ensure that the final sample group is representative of the Canadian populace and is believed to be a true reflection of Canadian opinion at the time of the research.

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Perception of Job Security by Region and Age

	2012-03	2012-04	2012-05	2012-06	2012-07	2012-08	2012-09
Canada	+43.9	+39.7	+29.2	+35.2	+30.8	+38.3	+33.7
Region							
Atlantic	+26.3	+27.6	+25.3	+38.5	+19.4	+35.9	+42.1
Quebec	+31.1	+24.7	+21.6	+26.2	+24.4	+29.6	+28.1
Ontario	+50.8	+41.3	+29.4	+33.0	+17.9	+35.5	+28.9
Prairies	+59.5	+60.3	+41.2	+54.1	+48.1	+54.4	+48.1
British Columbia	+42.5	+42.0	+28.5	+26.6	+51.3	+37.8	+27.8
Age							
18-29	+43.1	+54.3	+34.8	+27.7	+45.2	+41.4	+52.1
30-39	+48.5	+42.0	+30.2	+38.5	+41.2	+48.5	+34.5
40-49	+40.8	+33.4	+31.7	+44.2	+27.5	+34.7	+20.7
50-59	+56.2	+22.2	+29.4	+36.0	+29.6	+38.7	+28.1
60 plus	+31.2	+43.9	+21.3	+30.4	+14.5	+30.8	+32.9

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About the Nanos tracking on the economy

As part of an effort to monitor consumer sentiment, Nanos tracks the perceptions of Canadians on a series of measures including views on the future strength of the Canadian economy, real estate values, job security, and whether Canadians are better or worse off. These measures are used to create the overall Nanos Economic Mood Index and the Pocketbook and Expectations Sub-Indices.

Since 2008, the Nanos Economic Mood Index has been calculated quarterly. Since February 2012, it has been released on the 15th of each month or the next business day, if on a weekend or holiday.

Data is exclusively released into the public domain at 8:30 am ET. No new data is released to Nanos clients on any of the measures prior to the public release time.

Nanos Economic Mood Index

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Nanos Pocketbook Sub-Index

The Nanos Pocketbook Index captures views related to job security and how a consumer's personal financial situation has changed in the past year.

Nanos Expectations Sub-Index

The Nanos Expectations Index is based on the direction consumers see the economy going in terms of strength, as well as weakness and perceptions related to the expected value of real estate in their neighborhood.

Timing

The current wave is based on a representative random sample of 1,000 Canadians, conducted online by Nanos Research on September 10th and 11th, 2012.

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Sample Distribution

Region					Age Group				
Atlantic	Quebec	Ontario	Prairies	BC	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
100	250	300	200	150	206	171	208	180	235

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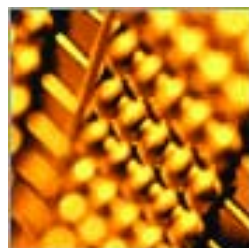
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The Nanos Approach

At Nanos Research, we are experts at helping public-facing companies and organizations connect with the “hearts and minds” of customers or the general public. Our advantage comes from over 20 years experience in understanding the numbers and building upon them to provide strategic insight and intelligence in support of our clients’ business, marketing, public affairs and communications needs.



Getting Started

At Nanos, we believe that small steps can lead to large insights. We are regularly in the field with national omnibus surveys. We'll sit down with you to learn about your challenges and work on your challenge together. The results can be used to conduct a strategic assessment of your current challenge or can be the basis of a broader mission plan for you to achieve your market or mind share objectives.

The Right Solution for the Right Job

- Strategy Retainer
- Strategic Assessment
- Telephone Surveys
- Online Surveys
- eConsultation Polling and Online Dialogue
- Focus Groups
- Elite in-depth interviews
- Mystery Shopping
- Management Consulting



A Trusted Source

Our team is headed by Nik Nanos, a leader in the market and public opinion research industry recognized for the quality of his work, the insightfulness of his counsel and his professional integrity. Media organizations regularly call upon Nik Nanos and Nanos Research to capture the public pulse and analyze complex issues.

For the recent national election, Nanos was the official pollster for CTV News and the Globe and Mail, Canada's national newspaper.



The Nanos Research Group

Our group of companies is a national team of like-minded research professionals and organizations bound by a common commitment to quality research, quality service and superior research outcomes.



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