

**Enviro
nics
Institute**
For Survey Research

A
**FOCUS
CANADA**
REPORT

Satisfaction, Outlook & Opportunities

DECEMBER 2022

Background



As part of its **Focus Canada** public opinion research program (launched in 1976), the Environics Institute updated its research on Canadian attitudes about the economy and opportunities for social mobility. The survey was conducted in partnership with Century Initiative. This survey is based on telephone interviews conducted (via landline and cellphones) with 2,000 Canadians between September 6 and 30, 2022. A sample of this size drawn from the population produces results accurate to within plus or minus 2.2 percentage points in 19 out of 20 samples.



The **Environics Institute for Survey Research** was established in 2006 as an independent non-profit organization to promote relevant and original public opinion and social research on important issues of public policy and social change. It is through such research that organizations and individuals can better understand Canada today, how it has been changing, and where it may be heading.

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Century Initiative is a national, non-partisan charity with a mission to enhance Canada's long-term prosperity, resiliency and global influence by responsibly growing the population of Canada to 100 million by 2100. Century Initiative delivers its mission by leading, enabling and partnering on initiatives that support long-term thinking and planning in immigration, urban development, employment and entrepreneurship, early childhood supports, and education.

centuryinitiative.ca

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Executive summary

Current circumstances and events are presenting Canadians with an accumulation of challenges. The COVID-19 pandemic is lingering and placing renewed pressure on an already stretched health care system. At the same time, new concerns have emerged over the rising cost of living and the looming possibility of a global economic recession. The international context features a Russian invasion of Ukraine, tense relations with China, and destabilizing political polarization in the United States. Against this backdrop, the 2022 Focus Canada survey assessed Canadians' sense of satisfaction, their economic outlook, and their optimism regarding their own opportunities and those facing the next generation.

The survey finds that younger Canadians have grown more dissatisfied with the way things are going in the country, and more pessimistic about prospects for the next generation.

Overall, Canadians are evenly divided as to whether they are satisfied or dissatisfied with how things are going in the country today. And they are feeling relatively pessimistic about the economy, with one in two saying it is getting weaker, compared to only one in 10 who say it is getting stronger. This coincides with the emergence of inflation, rather than the pandemic, as Canadians' top concern.

Despite this, four in five Canadians are currently satisfied with their standard of living. Moreover, the level of satisfaction with one's standard of living today is no lower than that seen consistently over the past several decades.

A majority of Canadians are also currently satisfied with opportunities to get ahead in this country, compared to one in three who are dissatisfied. And they are twice as likely to say they are better off than their parents were at their age, as to say they are worse off. The proportion saying they are better off than their parents has remained unchanged, at about one in two, for over two decades.

A key indicator of people's overall outlook, however, is how they feel about the prospects for the next generation. A plurality of Canadians fears the next generation will be worse off when they become the same age as they are now, and only about one in four say that the next generation will be better off. The proportion currently expecting that the next generation will be worse off is somewhat higher today than it was 10 years ago. But it is lower than it was in the mid-1990s, and similar to what it was over three decades ago, in 1990. Over three decades, then, there is no clear trend toward greater pessimism about the prospects for the next generation.

On these questions, Quebecers and Albertans often hold contrasting views. Satisfaction with the way things are going in Canada today, one's standard of living and opportunities to get ahead is, in each case, highest in Quebec and lowest in Alberta. In the case of opportunities to get ahead in Canada, the level of satisfaction was higher in Alberta than in Quebec three decades ago, but is lower in Alberta than in Quebec today. People in these two provinces also differ over which issues are most important, with Quebecers much more likely to mention climate change and health care, and Albertans much more likely to mention inflation and poor government leadership.

There are also differences in outlook among age groups. In recent years, satisfaction with the way things are going in the country has fallen most for younger Canadians (those between the age of 18 and 29). In fact, younger Canadians are the only age group that is significantly less satisfied today than they were in the spring of 2019.

Younger Canadians are also more preoccupied with the cost of living and affordable housing than their older counterparts, and comparatively less concerned about health care. In terms of prospects for the next generation, younger Canadians have become more pessimistic over the past decade, while their older counterparts have become more optimistic. Paradoxically, however, younger Canadians stand out as the only age group that today is currently more satisfied with opportunities to get ahead in Canada than they were in the late 1980s or early 1990s.

Finally, there are significant differences in outlook among supporters of the different federal political parties, as the mood among Conservative supporters has soured. Dissatisfaction with one's standard of living and opportunities to get ahead in Canada is highest among supporters of the Conservative Party and lowest among Liberal Party supporters. A decade ago (when the Conservatives formed government), Conservative Party supporters were less likely than supporters of the Liberal Party to expect the next generation to be worse off. Today, Conservative Party are much more likely than Liberal Party supporters to hold this view.

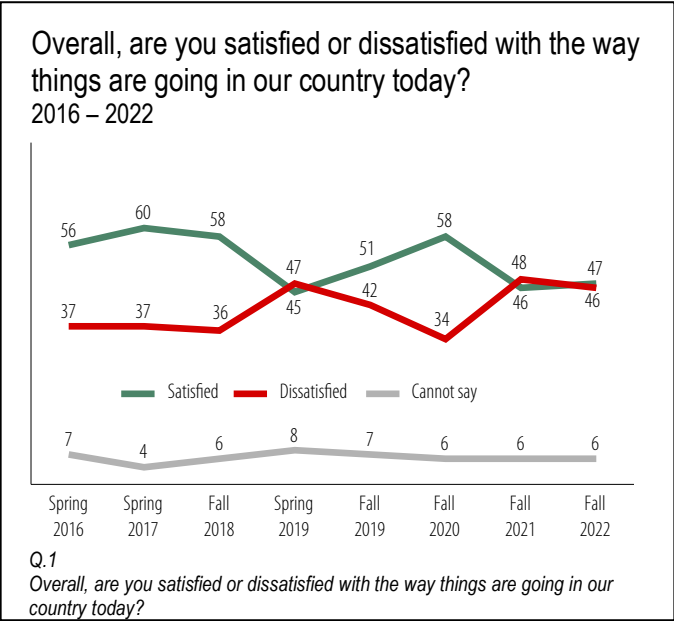
Satisfaction with the way things are going

Canadians are evenly divided as to whether they are satisfied or dissatisfied with how things are going in the country today. In recent years, satisfaction declined much more noticeably for younger Canadians than for other age groups.

Satisfied or dissatisfied with the way things are going in our country today.

Canadians are evenly divided in their views on how things are going in the country today. Currently, about one in two say they are satisfied (47%), but as many say they are dissatisfied (46%).

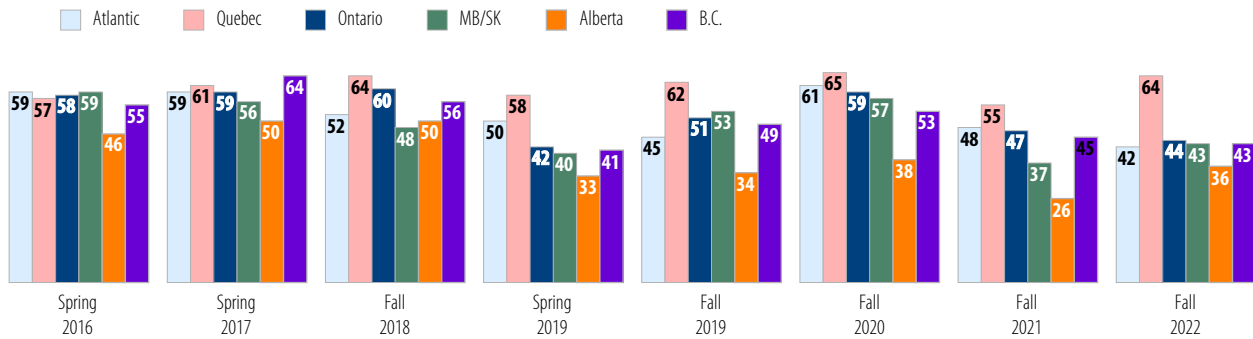
The level of satisfaction is virtually unchanged from a year ago, when it stood at 46 percent – it is also relatively unchanged from the spring of 2019 (45%). But satisfaction is lower today than in the autumn of 2020; satisfaction with the direction of the country rose to 58 percent after the initial waves of the pandemic, before declining again once the subsequent waves fuelled by new COVID-19 variants told hold.



The overall stability in satisfaction over the past 12 months masks different trends at the regional level.

- While satisfaction is lowest in Alberta, it has nonetheless seen the biggest increase since 2021 (up 10 points, from 26% to 36%).
- Satisfaction has also risen significantly in Quebec (from 55% to 64%).
- But, over the past 12 months, satisfaction has dropped slightly in the Atlantic provinces (from 48% to 42%), Ontario (from 47% to 44%) and B.C. (from 45% to 43%).

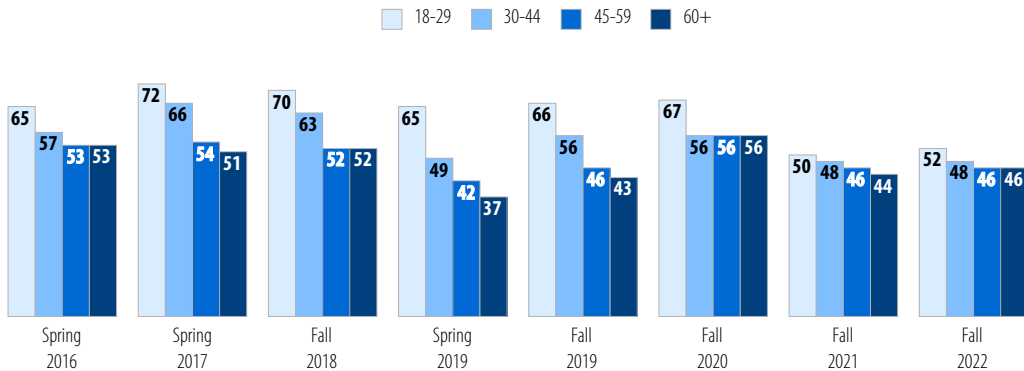
Overall, are you satisfied or dissatisfied with the way things are going in our country today?
2016 – 2022 Satisfied, by region



Q.1
Overall, are you satisfied or dissatisfied with the way things are going in our country today?

These changes notwithstanding, Quebec and Alberta continue to stand out as the provinces where satisfaction is much higher (Quebec) and much lower (Alberta) than average. Satisfaction in the other provinces and regions remains close to the national average. There is currently a 28-point gap in satisfaction between Quebec and Alberta – consistent with the extent of the gap since 2019.

Overall, are you satisfied or dissatisfied with the way things are going in our country today?
2016 – 2022 Satisfied, by age



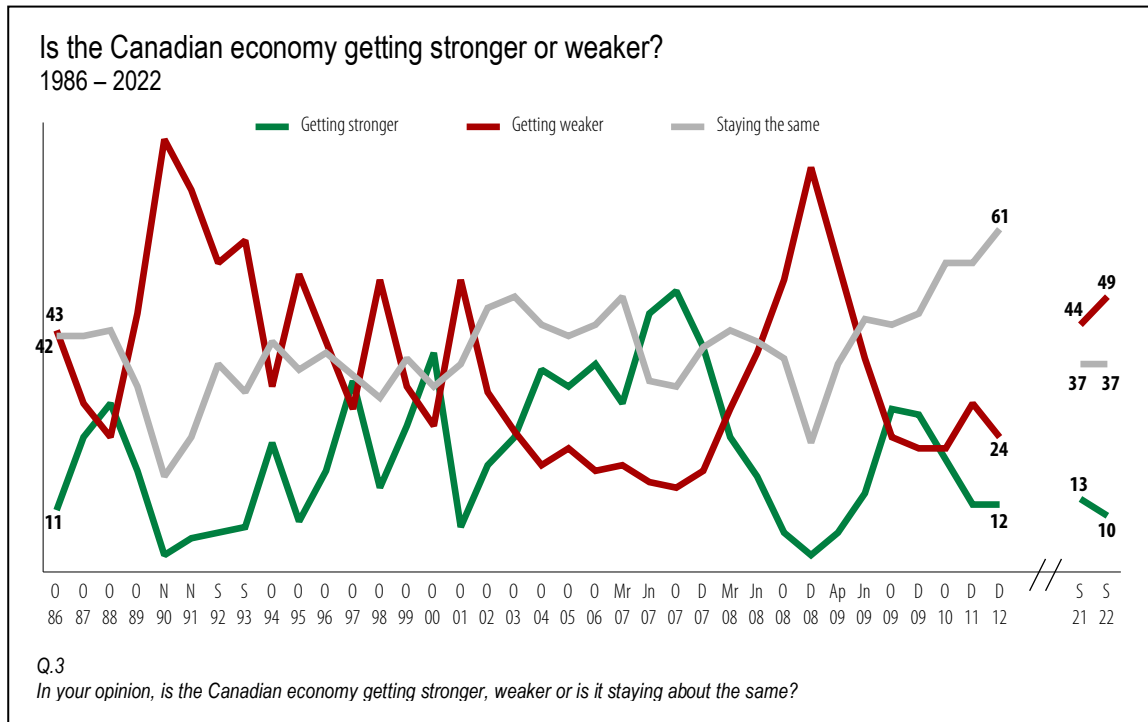
Q.1
Overall, are you satisfied or dissatisfied with the way things are going in our country today?

There is currently little significant difference in satisfaction among age groups – but this represents a change from 2020 and earlier, when younger adults were much more likely to be satisfied. After 2020, satisfaction declined much more noticeably for Canadians between the ages of 18 and 29 than for other age groups. Younger Canadians are currently the only age group that is significantly less satisfied today than they were in the spring of 2019. Those age 30 to 44 are just as satisfied today as they were then, while those age 45 and older and have grown more satisfied. As a result, the gap in satisfaction between the youngest and oldest age groups that existed before the pandemic has narrowed considerably (from 28 points in spring 2019, to 6 points in autumn 2022).

Economic outlook

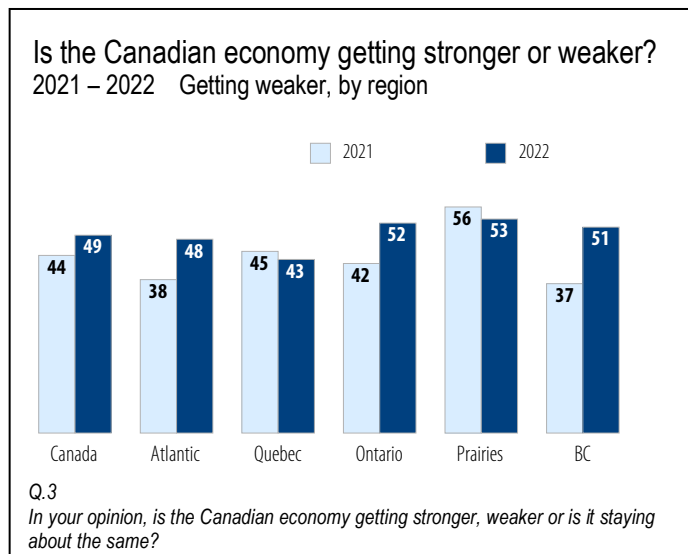
The proportion of Canadians who feel the economy is getting weaker is about twice as high today as it was a decade ago.

Strength of the Canadian economy. Canadians are feeling relatively pessimistic about the economy, with one in two (49%) saying it is getting weaker, compared to 37 percent who say it is staying about the same, and only 10 percent who say it is getting stronger. Views are slightly more negative than a year ago, with the proportion saying the Canadian economy is getting weaker rising five points (up from 44% in 2021).



By way of comparison, the proportion of Canadians who feel the economy is getting weaker is about twice as high today as it was a decade ago (in 2012), and roughly the same today as it was in the fall of 2008, at the onset of the global financial crisis (but much lower than the 72% who said the economy was getting weaker at the peak of the financial crisis in early 2009).

Comparing views in 2022 to those of a year ago, growing pessimism is most evident in B.C., where the proportion saying the Canadian economy is getting weaker is up 14 points; as well as in Atlantic Canada and Ontario (up 10 points each).



The proportion saying the Canadian economy is getting weaker is more or less unchanged in the Prairies (down 3 points) and Quebec (down 2 points).

Most important problem

Inflation has taken the place of the pandemic as Canadians’ top concern. Generally speaking, concerns about health care are somewhat higher among older Canadians, but concerns about the cost of living are somewhat lower.

What is the most important problem facing Canadians today? Over a two-year period (in 2020 and 2021), the COVID-19 pandemic dominated the list of problems preoccupying Canadians. Today, despite warnings that the pandemic is far from over – at least in terms of the health risks posed by the continuing spread of the virus – the issue has been overtaken by other concerns. Whereas 39 percent of Canadians said that the pandemic was the most important problem facing Canadians in 2020, and 24 percent held the same view in 2021, only two percent give that response today.

Inflation has emerged to take the place of the pandemic as the top concern. About one in five (22%) mention inflation, the cost of living or gas prices as the most important problem facing Canadians today (this question is open-ended, meaning that respondents can answer in their own words; only one response is permitted). An additional six percent mention the related issue of housing affordability. The next most often reported problems (after inflation) are health care (15%), the economy or unemployment (12%), and climate change (10%). The proportion mentioning health care as the most important problem is the highest since 2008.

What is the most important problem facing Canadians today?

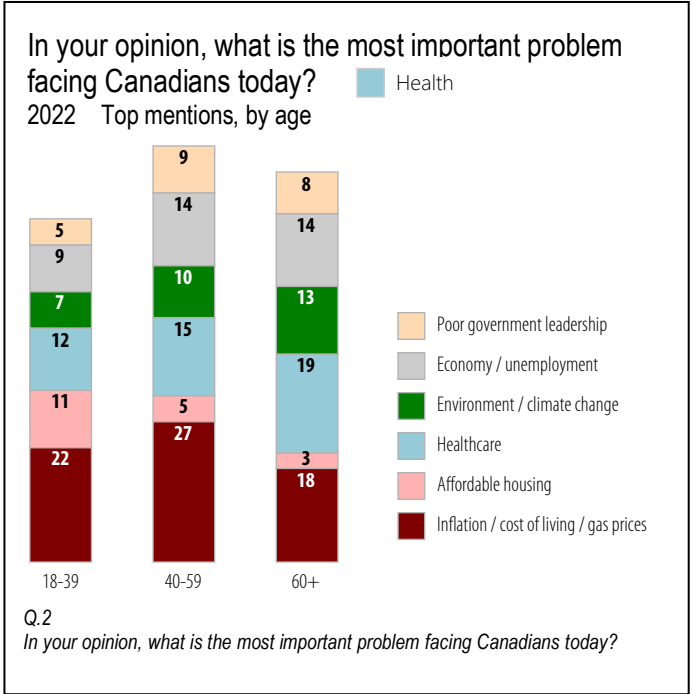
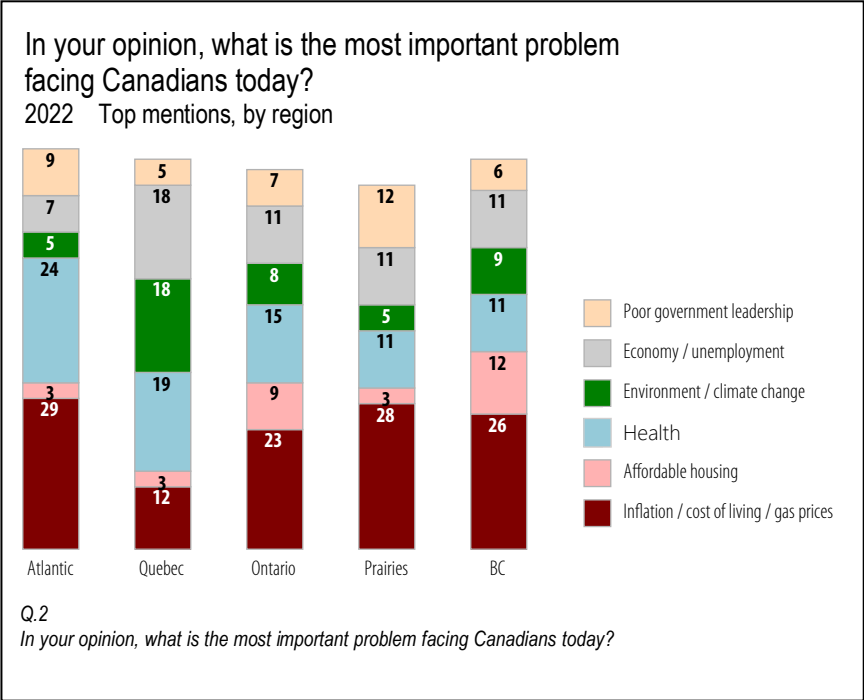
	2017- April	2018- Oct	2019- April	2019- Oct	2020- Oct	2021- Sept	2022- Sept
Inflation / cost of living / gas prices	7	4	9	8	1	3	22
Health care	12	9	8	9	7	9	15
Economy / unemployment	26	18	17	14	17	10	12
Environment / climate change	5	10	14	24	5	13	10
Poor government leadership	7	8	14	8	8	7	7
Affordable housing	--	--	--	--	1	5	6
COVID-19 pandemic	--	--	--	--	39	24	2

Views as to which issue is most important vary by region, differing most notably in Quebec. In every region outside Quebec, inflation is mentioned most frequently. In Quebec, however, inflation is only the fourth most frequently mentioned issue, behind health care, climate change, and the economy or unemployment. Climate change is more than twice as likely to be mentioned by Quebecers (18%) as by those living outside the province (7%).

While inflation is the most frequently mentioned problem in Atlantic Canada, health care is mentioned almost as frequently in the region. Health care is much more likely to be seen as the most important problem facing the country in Atlantic Canada (24%) than it is in the rest of the country (15%).

There are also differences in opinion among age groups. Generally speaking, concerns about health care are somewhat higher among older Canadians, but concerns about the cost of living are somewhat lower. Affordable housing is named as the most important problem by 11 percent of those age 18 to 39, but only five percent of those age 40 to 59, and only three percent of those age 60 and older. Looking at the issues of inflation and affordable housing together, these are seen as most important by about one in three of those under the age of 60, compared to 21 percent of those age 60 and older.

Women (21%) are twice as likely as men (10%) to say that health care is the most important problem facing Canadians today, while men (11%) are more likely than women (4%) to mention poor government leadership. The likelihood of mentioning health care is especially high among women in both Atlantic Canada (31%) and Quebec (25%).



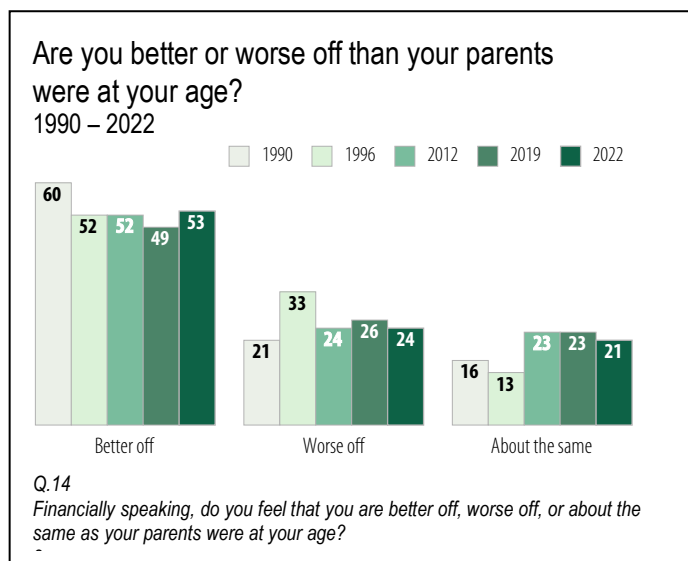
Economic mobility

Canadians are much more likely to expect the next generation to be worse off than better off, but this does not represent a change in view: this has been the case consistently since this question was first asked over three decades ago. Over the past decade, younger Canadians have become more pessimistic about prospects for the next generation, while their older counterparts have become more optimistic.

One of the main measures of the state of the economy is the extent to which it is able to provide opportunities for individuals to improve their circumstances – to move up the economic ladder through a combination of education, talent and hard work. Many parents are motivated by the belief that their efforts will result in a much better life for their children. Younger Canadians are no less motivated by a sense that their own efforts will open doors to opportunities not available to their parents.

Are you better off than your parents were at your age?

The Focus Canada survey addresses this issue by asking two questions about inter-generational economic mobility. The first question asks Canadians whether they are better or worse off than their parents were at their age. Just over one in two (53%) say they are better off – twice as many as the proportion who say they are worse off (24%) (an additional 21% say they are doing about the same as their parents were at their age). The proportion saying they are better off is up slightly (by 4 points) from 2019, when this question was last asked, but more generally has remained unchanged at about one in two since 1996. The proportion saying they are worse off has remained stable at about one in four over the past 10 years, but is lower than it was in 1996.

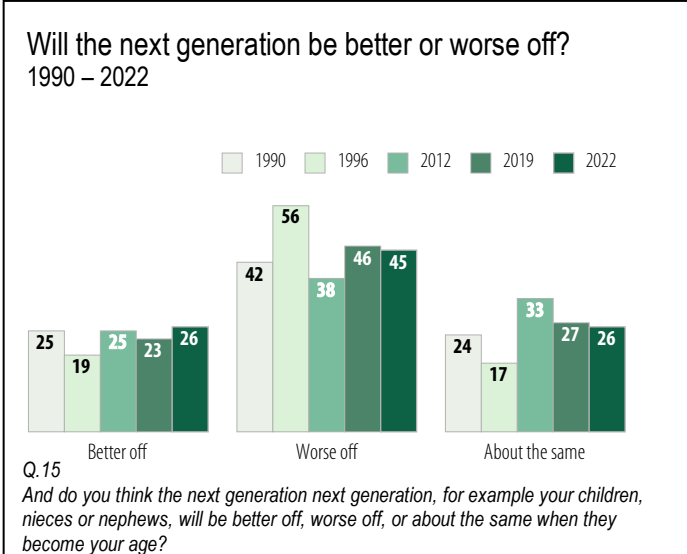


The proportion saying they are worse off financially than their parents declines with age, from 35 percent among those age 18 to 29, to 14 percent among those age 60 or older. Immigrants (17%) are less likely than those who are born in Canada (27%) to say they are worse off than their parents.

Will the next generation be better off than you? A second question asks Canadians to look ahead at prospects for the next generation. Only about one in four (26%) say that the next generation will be better off when they become the same age as they (those answering the question) are now. A plurality (45%) fears the next generation will be worse off, and 26 percent think they will be doing about the same.

The proportion expecting the next generation to be worse off when they become the same age as they are now is highest in B.C. (54%) and Alberta (51%), and lowest in Atlantic Canada (37%). It is also higher among those born in Canada (49%) and lower among immigrants (31%). In this case, it is not highest among those in the youngest age group; rather, it is highest among those age 45 to 59 (51%), and lowest among those age 60 and older (38%).

While Canadians are much more likely to expect that the next generation will be worse off than better off, this does not represent a change in view: this has been the case consistently since this question was first asked over three decades ago. In fact, responses today are almost exactly the same as they were in 1990. The proportion expecting that the next generation will be worse off is somewhat higher today than it was 10 years ago (in 2012), but 11 points lower than it was in 1996. In short, over three decades, there is no clear trend toward greater pessimism about the prospects for the next generation.



Looking at the trends on both of these questions over the past 10 years, however, there are some differences among age groups. Younger Canadians have become more pessimistic, while their older counterparts have become more optimistic. For instance, between 2012 and 2022:

- The proportion of 18- to 29-year-olds who say they are worse off than their parents were at their age has increased by 13 points, and the proportion that expects the next generation will be worse off when they become their age has increased by 19 points.
- The proportion of 30- to 44-year-olds who say they are worse off than their parents were at their age has increased by seven points, and the proportion that expects the next generation will be worse off when they become their age has increased by 19 points.
- The proportion of 45- to 59-year-olds who say they are worse off than their parents were at their age has dropped by five points, and the proportion that expects the next generation will be worse off when they become their age has increased by only two points.
- The proportion of those age 60 and older who say they are worse off than their parents were at their age has dropped by three points, and the proportion that expects the next generation will be worse off when they become their age has dropped by eight points.

Ten years ago, in 2012, older Canadians (those age 60 and older) were more pessimistic about the prospects for the next generation than were their younger counterparts (those age 18 to 29); today, the reverse is true.

That said, it is important to note that, while the outlook of younger Canadians has become more pessimistic since 2012, it is not more pessimistic than ever. In 1996, Canadians age 18 to 29 were more likely than they are today to say they are worse off than their parents were at their age, and to say that the next generation will be worse off when they become their age.

On the question the prospects for the next generation, a gap has also emerged over the past 10 years between the opinions of supporters of the main political parties (note that this period of time, from 2012 to 2022, is marked by the change of federal government from Conservative to Liberal that occurred in 2015). In 2012, Liberal Party

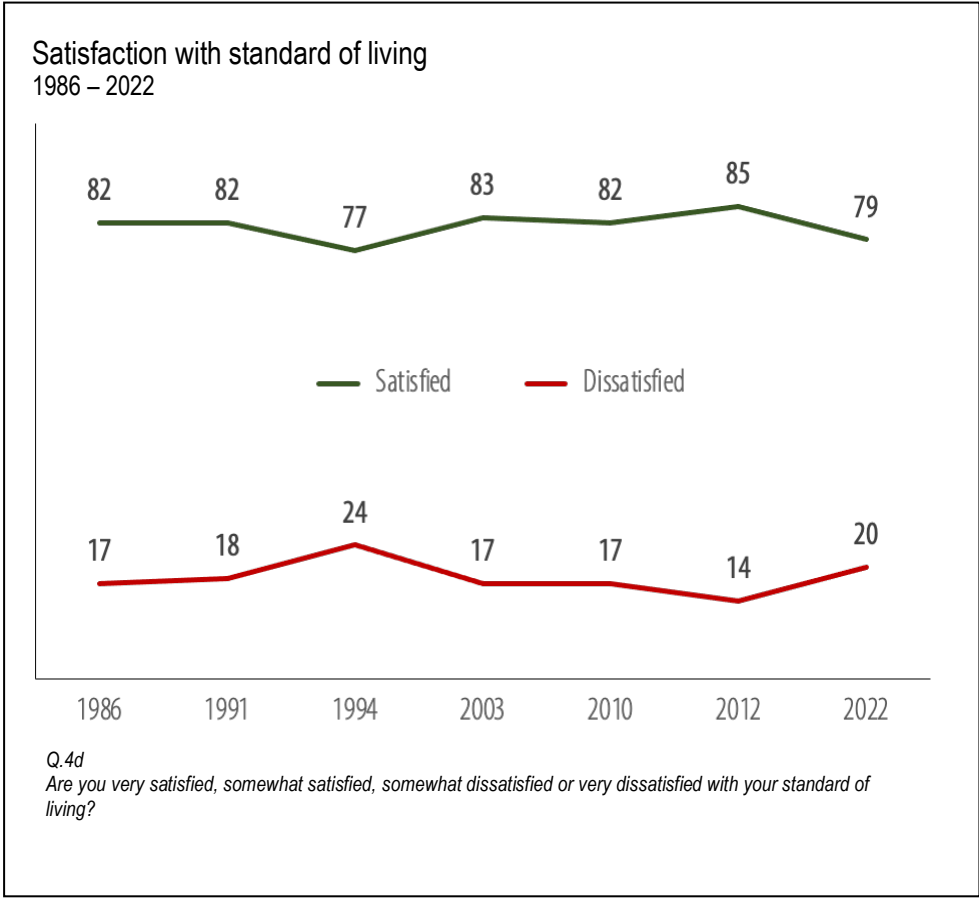
supporters (43%) were seven points more likely than Conservative Party supporters (36%) to expect that the next generation will be worse off. Since then, the proportion of Liberal supporters holding this view has dropped by 12 points, while the proportion of Conservative supporters holding this view has increased by 17 points. As a result, today Liberal Party supporters (31%) are 22 points *less* likely than Conservative Party supporters (53%) to expect the next generation will be worse off. The proportion of NDP supporters expecting that the next generation will be worse off has also grown during this period, from 40 percent to 56 percent.

Economic opportunity

Most Canadians are satisfied with their standard of living, and this has remained consistent over several decades. A majority of Canadians are also currently satisfied with opportunities to get ahead in this country. In both cases, levels of satisfaction have improved over time in Quebec, but declined in Alberta.

Satisfaction with your standard of living As noted previously, the September 2022 Focus Canada survey finds that almost one in two Canadians is dissatisfied with the ways things are going in the country today, while a growing number express concerns about inflation and very few feel optimistic about the economy. Despite this, most Canadians are currently satisfied with their standard of living. Four in five (79%) say they are satisfied, including 33 percent who are very satisfied and 46 percent who are somewhat satisfied. One in five (20%) is somewhat (13%) or very (7%) dissatisfied.

Dissatisfaction with one’s standard of living is highest among those with the lowest incomes (37% of those with annual household incomes below \$30,000 are dissatisfied). Dissatisfaction is also higher than average among Albertans (31%), supporters of the Conservative Party (27%), and those ages 30 to 44 (25%) and 45 to 59 (23%). Dissatisfaction is lower than average among those with annual household incomes of \$100,000 or more (14%), those with a university degree (14%), those age 18 to 29 (14%), Quebecers (11%) and supporters of the Liberal Party (11%).



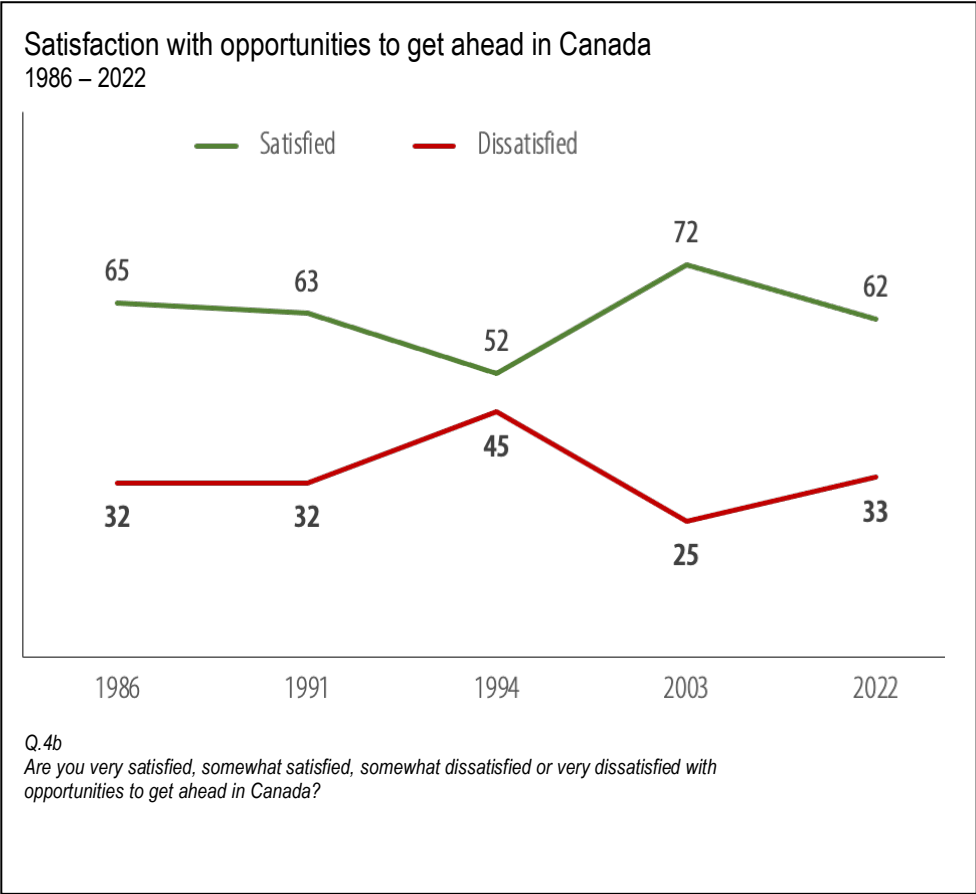
Compared to 10 years ago, satisfaction with one’s standard of living has declined slightly (by 6 points). But more generally, the level of satisfaction today is very similar to that seen consistently over several decades. Since the question was first asked in 1986, satisfaction with one’s standard of living has remained close to 80 percent.

Since 2012, dissatisfaction with one’s standard of living has increased most for Albertans (from 15% to 31%), those age 30 to 44 (from 9% to 25%) and those who support the Conservative Party (from 11% to 27%).

Satisfaction with opportunities to get ahead A majority of Canadians (62%) are also currently satisfied with opportunities to get ahead in this country. Only 16 percent say they are very satisfied with opportunities to get ahead in Canada, but 46 percent say they are somewhat satisfied. One in three (33%) are somewhat (20%) or very (13%) dissatisfied.

Dissatisfaction with opportunities to get ahead in Canada is highest among supporters of the Conservative Party (50%), Albertans (44%), and those age 45 to 59 (38%). It is lowest among Liberal Party supporter (17%), Quebecers (20%), those age 18 to 29 (27%) and those with a university education (28%).

Satisfaction with opportunities to get ahead in Canada has varied somewhat over the years; it dipped in the mid-1990s and peaked in the early 2000s. Thus, the level of satisfaction today is 10 percentage points lower than in 2003 (the last time this question was asked in a Focus Canada survey), but 10 points higher than in 1994. It is also now at more or less the same level as in the late 1980s or early 1990s, indicating that there has been no consistent change over 35 years.



Regionally, the trends in Quebec and Alberta are quite different. Compared to 1994 (when Canada-wide satisfaction with opportunities to get ahead was at its low point), satisfaction in Quebec has increased by 29 percentage points (from 42% to 71%). But over the same period, satisfaction has declined by 10 points in Alberta (from 63% to 53%). Whereas in 1994, satisfaction with opportunities to get ahead in Alberta was 21 percentage points higher than in Quebec, today it is 18 points lower.

Satisfaction among each age group follows the same pattern over time, reaching a low in 1994 and a high in 2003. But younger Canadians, between the ages of 18 and 29, stand out as the only age group that is currently more satisfied than they were in the late 1980s or early 1990s.

Finally, while satisfaction with opportunities to get ahead has declined by 10 percentage points overall since 2003, the pattern differs considerably among the supporters of the main federal political parties. Satisfaction is unchanged (at 80%) among supporters of the Liberal party, and essentially unchanged among NDP supporters (falling 2 points, from 65% to 63%). But there has been a 23 percentage point drop (from 69% to 46%) among Conservative Party supporters.

