



Focus Canada 2012

Public opinion research on the record
Serving the public interest since 1976



“Surveys produce just what democracy is supposed to produce – equal representation of all citizens.”

– Sidney Verba (1996)

The Environics Institute

The Environics Institute for Survey Research was established by Michael Adams in 2006 to promote relevant and original public opinion and social research on important issues of public policy and social change.

The focus of the Institute’s mandate is to survey individuals and groups not usually heard from, asking questions not normally asked. Integral to the Institute’s approach is: a) early consultation and engagement with populations to be surveyed to ensure a respectful approach in how the research is conducted; and b) broad dissemination of research findings to stimulate constructive discourse and informed responses to the research findings.

The Institute pursues this mission by:

- (1) Sponsoring survey research on issues of public importance which are not being addressed by other organizations (e.g., governments, media, foundations) in Canada and abroad;
- (2) Proactively disseminating Institute-sponsored research to encourage its use and impact, through media partnerships and by providing access to academic researchers, students, foundations, think tanks and journalists;
- (3) Encouraging informed public discourse on issues related to Institute-sponsored research;
- (4) Promoting the importance and role of survey and social research in public policy and democracy through outreach activities (e.g., publications and public commentary, events, partnerships); and
- (5) Serving as a centre of excellence for responsible public opinion research methods and application, through education, training and consulting.

The Institute seeks to collaborate with other organizations that share its broad objectives and want to play a substantive role in specific research initiatives (as advisors, study partners, funders and media partners).

Further details about Institute projects can be found at www.environicsinstitute.org.

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Contents

Introduction	1
Executive Summary	3
The Economy and Standard of Living	9
Canadian Identity and Symbols	17
National Governance and Federalism	23
Foreign Investment	33
Health Care	35
Climate Change	40
Immigration	44
Canada's Role in the World	47
Social Capital	50

Introduction

Why public opinion matters

Public opinion matters – in all countries, but especially in democracies like Canada. Public opinion research in the public interest makes an essential contribution to good governance and meeting societal challenges.

American polling pioneer George Gallup in his 1940 classic *The Pulse of Democracy* (co-authored by Canadian Saul Rae) characterized public opinion polling as an essential extension of democratic institutions and a free press, a counterweight to special interests and those who purported to speak on behalf of the public but often did not.

In democracies today, the support, acceptance or at least acquiescence of the public is required in order to govern, make policy and address the important challenges facing society. On any given issue, competing interests will seek not only to build public support for their position, but to determine and demonstrate that citizens are on their side.

Who is to say what citizens believe on important issues of the day, in the absence of a formal political process such as an election or referendum? Public opinion research has emerged in the past four decades to help answer this question. The tools of social science developed and refined to inform consumer marketing have also proven effective in understanding citizen opinion on important issues, as well as illuminate their underlying attitudes and values.

When made public, such research can have a significant impact on the public debate by revealing to everyone where the public stands on key issues, and testing the claims of competing interests. Good research also reveals the views of important segments of the population – women, youth, regional populations, new Canadians, and those who are at the margins of power and decision-making. Published research has had an important influence on the evolution of major issues in Canada such as free trade, Quebec sovereignty and the accommodation of cultural diversity. Public opinion research has become a broadly accepted litmus test for public support on almost every issue of the day.

Credible public opinion research in the public interest is thriving today in some parts of the world. In the USA, the respected Pew Research Center conducts and publishes an ongoing stream of methodologically rigorous and thoughtful surveys covering the full gamut of social and political issues, often extending to international studies covering many countries.

In Canada, thoughtful and sustained public interest research has been diminishing. Governments at the federal and provincial levels were once major sponsors of syndicated public affairs research, but this type of investment has declined significantly in recent years. As a result, the funding for such research has all but evaporated, and studies are being scaled back or stopped altogether. This vacuum is being filled by less credible and, in some cases, questionable alternatives in the form of media-sponsored polls, advocacy research and casual opt-in polls.

What is missing in Canada today is credible, independent and thoughtful public opinion research in the public domain, that illuminates rather than sensationalizes or promotes partisan or ideological interests. Also missing is research that is conducted and presented in the context of historical Canadian polling trends and international comparisons.

Focus Canada research program

To address this gap, the Environics Institute in 2010 launched a new public opinion research program to build upon the syndicated Focus Canada research conducted by the Environics Research Group for more than three decades (1976 – 2009). The purpose of this initiative is to provide a credible, independent and sustained source of Canadian public opinion on important issues that will be on the public record for use by organizations and individuals in the public, private and non-profit sectors.

The focus of this new research program is on providing:

- A continuation of the ongoing tracking and measurement of Canadian public opinion at the national, provincial and regional levels (begun in 1976) to identify important changes (or the lack of change) over time;
- Coverage of topics ranging from politics and governance, the economy and social issues, to foreign policy, technology and social values; and
- Full public access to the research findings, through reports, a website, conferences and other events, as ways to contribute to public debate and study.

All Focus Canada reports for 2010 and beyond are available on the Institute website.

Focus Canada 2012 survey

This year's principal theme is "Revisiting the Ties that Bind," updating key trends in how public opinion is shaping and influenced by the forces that bind this country together and stretch it apart. Topics covered include national identity, bilingualism, federalism, immigration, health care, climate change, foreign investment and Canada-U.S. relations. This survey also addresses how Canadians assess their standard of living and household debt, as well as exploring the concept of "social capital," updating key indicators from a landmark Canadian study conducted 10 years ago.

The Focus Canada 2012 survey was conducted for the Institute by Research House, and was based on telephone interviews with a representative sample of 1,500 Canadians (aged 18 and over) between November 15 and December 5, 2012. The survey sample is stratified to ensure coverage of all 10 provinces, and is representative of the population by age cohort, gender and community size. The results from a survey of this size drawn from the population would be expected to produce results accurate to within plus or minus 2.5 percentage points, in 95 out of 100 samples (the margin of sampling error will be larger for specific subgroups of the population).

The following sections present the results of this survey, with a focus on national results and how opinions have changed (or not) over time. Previous Canadian data is drawn from Environics' Focus Canada research and Environics Research's syndicated Canadian Environmental Barometer (used with permission). Current U.S. findings come from surveys conducted by the Pew Research Center and Gallup.

This year's survey received sponsorship support from the Canadian Opinion Research Archive (CORA) at Queen's University, which makes available commercial and independent surveys to the academic, research and journalistic communities. Founded in 1992, CORA contains hundreds of surveys, including thousands of discrete items collected by major commercial Canadian firms dating back to the 1970s.

Further details on the survey results are available through the Environics Institute (contact Dr. Keith Neuman at keith.neuman@environics.ca).

Executive Summary

2012 has been another year of turbulence and uncertainty in many parts of the world, with ongoing economic turmoil spreading across Europe, continuing ethnic tensions throughout much of the Middle East and central Asia, and natural disasters wreaking havoc around the globe. Canada remains largely insulated from these global challenges, and this is reflected in the public's comparatively positive view of their country and circumstances.

Once again, Canada is one of only a few nations where a majority believe their country is generally heading in the right direction, and despite fault lines on many issues, trends over the past year are more often than not positive. Since 2011, Canadians, as a whole, express increased confidence in their overall system of government, less concern about their health care system, continued comfort with the level of immigration, less worry about the economy, and a better opinion of the USA now that Barack Obama has secured a second term in the White House.

As well, most continue to be comfortable with the level of household debt they have taken on, consider themselves to be part of the middle-class, and are no less than before to feel satisfied with their standard of living. An important caveat is that those at the lower end of the income spectrum are becoming less comfortable with their economic security, and losing ground to those higher up the ladder.

One issue the public believes is not receiving sufficient attention is climate change. Despite the absence of attention given to this challenge by the mainstream media and federal politicians, an increasing majority of Canadians have concluded that climate change is a reality and requires serious attention from their governments. And proof of this viewpoint can be found in an expressed willingness to help pay for action through higher prices and taxes, as British Columbians are now doing through their provincial carbon tax.

What is the state of the "ties that bind" in terms of Canadians feeling connected to the country, against the many centrifugal forces in today's globalized, segmented and

wired world? In broad terms, the ties appear to be holding, although not without cracks. Canadians' level of pride in their country and its national symbols remain strong, and most continue to believe there are commonly-held values, including a strengthening commitment to the aspiration of bilingualism. The west has now replaced central Canada as the economically favoured region, but regional tensions have lost much of the energy from past decades. A national mindset is reflected in the belief expressed by a majority in all provinces (save Alberta) that the benefits derived from natural resources (like oil and gas) are a national resource that should be shared rather than reserved for the host province.

At the same time, the country's two solitudes seem to be moving apart. Quebecers may not be agitating for political sovereignty, but they do appear to be drifting away from a broader national vision. Their expressed pride in Canada and sense of shared values have declined to record low levels, and they are antagonized by a federal government seen as favouring other regions (with Alberta replacing Ontario as the undeserving beneficiary). Quebecers now seem to be the grumpiest of Canadians, expressing the most negative sentiments, be it about the economy, their standard of living, management of health care, cultural integration of immigrants, Canada's place in the world, or trust in ones neighbours.

Another trend is a growing generational gap, as Canadians under 30 also appear to be losing interest in the traditional national narrative about what makes Canada a nation. This is reflected in declining importance placed in national symbols, and especially traditional ones such as the national anthem and flag. Today's youth are also less likely to have a sense of commonly-held values across the country or express confidence in Canada's system of government. At the same time, Canada's millennial generation is not exhibiting signs of anti-social ennui; among age cohorts they express the most positive sentiments when it comes to bilingualism, immigration and the need for government and consumer action on climate change.

Finally, the Conservative Harper Government in Ottawa has passed its seven year anniversary, but has yet to put a clear stamp on public opinion. On most issues, Canadians' views show remarkable consistency over the past decade, and in many cases the trend has been in a progressive rather than conservative direction (e.g., on the role of government, climate change, immigration, same sex marriage, abortion).

Opinions often vary by political party support, but few of these differences are stark (except among supporters of the Bloc Quebecois) and show no clear sign of widening over time. So far, Canadians have avoided the poisonous partisan division on issues of the day that now paralyzes politics south of the border. Canadians may not be all that impressed with their politicians these days, but this has not yet caused most to lose faith in the democratic system or the country they call home.

The following are key highlights from the research:

The economy and standard of living

- Canadians continue to be more satisfied (54%) than dissatisfied (42%) with the general direction of their country today. This is down marginally from one year ago, but Canadians remain among the most upbeat among citizens of 22 nations, trailing only urban China (82%), and well ahead of the USA (29%) and most of Europe. Residents of the Prairies are now the most satisfied, while Quebecers and low-income Canadians are least apt to share this view.
- The economy and jobs continue to be the dominant “top of mind” concerns facing the country (mentioned by more than four in ten), but this focus has leveled off after several years of growth and fewer Canadians now see the national economy as weakening. Over the past year, however, confidence in economic conditions has strengthened in the Prairies, while declining in the east (especially Quebec).
- Ongoing concerns about macro economic trends notwithstanding, Canadians are as positive as they have been in two decades about their own standard of living. One-third are now very satisfied, compared with one in six expressing dissatisfaction. But this positive view is not evenly distributed, as satisfaction levels have improved since 2010 primarily among Canadians under 45, while the gap between the highest and lowest income households has widened to record levels.
- While household debt levels continue to climb, Canadians are no less comfortable than in pre-recession times with the amount of debt they are carrying. Just one in five (19%) report owing more than they can afford, a proportion unchanged from 2008 and lower than in 2005. Only among top income households has this proportion increased noticeably over the past four years.
- A general sense of economic security is also reflected by the fact that more than half (52%) of Canadians believe they are better off financially than their parents were at their age, compared with only 24 percent who say they are worse off. This compares favourably with the assessment in 1996, although not as positive as in 1990. At the same time, Canadians are less likely to anticipate the next generation will do better than themselves (25%), although this is more optimistic than in the mid-1990s when the economy was expanding.

Canadian identity and symbols

- Most (71%) continue to say they are very proud to be a Canadian, but this proportion has declined marginally for the first time in almost 20 years. This trend is evident across the country, but most notable is an ever widening divergence between Quebecers (34%) and other Canadians (83%), now the largest yet recorded. Strong pride in country is also diminishing among Canadians under 30, increasing the gap with the oldest generation. As in the past, people are most likely to attribute their pride to Canada being a free and democratic country.
- A majority of Canadians outside of Quebec continue to identify personally more with the country (57%) than with their home province (37%), with these numbers roughly reversed for Quebec. This is largely unchanged from 2010 at the national level, with minor shifts within western provinces (strengthening in Alberta and Saskatchewan while weakening in Manitoba and B.C.). As before, eight in ten immigrants identify more closely with Canada than their country of origin.
- Canadians continue to place strong importance on a number of established symbols of national identity, at the very top being the country's health care system (81%) and Charter of Rights and Freedoms (73%). The strength of attachment to these symbols has declined in almost all cases since 2010, returning to 2003 – 2007 levels. This downward trend is most evident among Quebecers, but

also among youth in the case of such traditional symbols as the flag, national anthem and RCMP.

- Most (67%) agree the values driving Canadian society today are similar to their own, and this view has held largely steady since 2000. At the same time, considerably fewer also believe there are shared values across all provinces (41%) or between urban and rural residents (38%). Opinions about shared values varies across the country (e.g., Quebecers are least apt to see common ground among provinces), but also across age cohorts with youth increasingly at odds with older generations.

National governance and federalism

- Public confidence in the country's system of government has improved marginally over the past year, reversing a previous one year decline. Seven in ten (71%) Canadians are now very or somewhat satisfied, just shy of the record high in 2010. This improvement is most evident in central Canada, although Saskatchewan residents are the most satisfied with the system of government, while Quebecers are the least so. Opinions vary dramatically across supporters of different federal political parties in a predictable fashion, but all except Green Party supporters are now more satisfied than in 2011.
- A majority (64%) of Canadians continue to believe the federal government favours one region over others, but this view has declined since 2005 and is now at its lowest point since 1986. This trend accompanies a major shift toward viewing the west (and especially Alberta), rather than central Canada, as the favoured region. Canadians invariably see as favoured a region other than their own, but Quebecers now focus on Alberta rather than Ontario, and western Canadians have shifted their resentment from Quebec to Ontario.
- Similarly, the public tends to think their own province gets back less from the federal government than they pay in (e.g., through taxes), but this view has softened over the past two decades, especially in Saskatchewan and Manitoba. Canadians are also more likely than in the past to believe the amount of money transferred in equalization payments from rich provinces to poor provinces is about right.
- Natural resources are a provincial jurisdiction, but two-thirds (67%) of Canadians believe the royalty revenue

generated by such industries as oil and gas, mining and forestry should be treated as a national resource and shared by all, rather than just going to the province in which the resources are found (28%). This national perspective is most widely held in Ontario, but is the majority view in every province except Alberta (where 41% agree, versus 53% who endorse provincial control).

- Quebecers' views about their place in Confederation have changed little since 2010. Public support has increased marginally for both the status quo (37%) and full independence (26%), while declining for the less clear cut options of special status (17%) and sovereignty association (16%). But perspectives on the economic impact of separation have evolved significantly over the past 15 years, as Quebecers increasingly see independence as harming their economy, while Canadians elsewhere are more likely than before to conclude it would make no difference to the national economy.
- Despite limited priority given to the country's official policy of bilingualism in recent years, public support has reached an all-time high. More than six in ten (63%) Canadians personally favour bilingualism for all of Canada, and almost as many (61%) favour it for their own province. Support continues to be most widespread in Quebec, but it is in B.C. where support for bilingualism has increased most noticeably since 2010. Alberta is moving in the opposite direction, with support for provincial bilingualism declining to 37 percent.

Foreign investment

- Most Canadians appear to appreciate the value of foreign investment, with six in ten (60%) endorsing more active government efforts to promote such investment to help create jobs. This largely reflects the view expressed in previous decades at the national level, but since 1992 support for increased foreign investment has strengthened in Atlantic Canada, while declining sharply in the west where fewer than half now agree (as low as 30% in Manitoba).
- At the same time, the public is growing increasingly skeptical about the security of jobs created through foreign investment, with an increasing majority (71%) agreeing that foreign-owned companies are less likely than domestic ones to protect jobs in this country. Similarly, only one in three (34%) Canadians believe that

foreign investment results in a clear “net benefit” for the country, in terms of contributing more to the country than it takes out.

- In light of such concerns, it is not surprising that Canadians care where this investment is coming from. Most Canadians approve of the purchase of Canadian-based companies by companies based in such countries as the USA (71%), Australia (71%), Germany (68%) and France (67%). Smaller majorities give such approval to companies from Brazil (60%) and India (55%), but only 42 percent say this should be allowed for companies based in China. Opposition to foreign-takeovers is most evident among B.C. residents outside of Vancouver, women, older Canadians and those with the lower education and income.

Health care

- Despite growing pressures on the health care system, public confidence has strengthened, and for the first time since 2002, as many Canadians believe the health care system is basically in good shape (49%) as say the system is in a state of crisis (48%). When asked about the main cause of problems in the health care system, a majority of Canadians continue to point to inefficient management of the system (62%) over insufficient funding (26%).
- Increasing satisfaction does not mean Canadians oppose changes to health care delivery which are seen as improvements. Timely access to needed services has been an ongoing public concern, and there is majority (54%) support for allowing citizens to purchase care outside of the public system if it is not readily available within the system. As well there is widespread public support (88%) for expanding drug coverage to cover all medications that doctors and their patients agree as most effective.
- There is less openness to change when it comes to reforms for controlling rising health care costs, and the public appetite for such change has not grown over the past decade. Fewer than half express support for such reforms as paying out of pocket for faster service (48%), paying a small user fee for every visit (46%), paying extra for use of the system beyond an allotted amount of care (41%), higher taxes (42%), and cutting back on the types of services covered under the public system (24%).

Climate change

- An increasing majority (57%) of Canadians believe the scientific evidence confirming that climate change is happening and primarily caused by human activity. This view has strengthened marginally over the past year and now at its highest point since 2009. Half as many (28%) say climate change is real but do not feel the science proves humans are the main cause, while one in ten (12%) remain skeptical that climate change is happening. Among those not yet convinced, half believe we should deal with the uncertainty by taking actions now to avoid worst case scenarios.
- In terms of who can be counted on to make serious progress on climate change, Canadians have consistently looked first to government implementing new standards and regulations (59%), and this view has strengthened over the past year and now at the highest level since 2007. By comparison, the public is less apt to say the most essential actions must come from industry making new investments (17%) or consumers making lifestyle adjustments (10%).
- Are Canadians prepared to help pay for solutions to climate change? An increasing majority (57%) say it is reasonable for households to pay an additional \$100 per year in higher taxes and prices to help address this problem. Almost two-thirds (64%) of British Columbians now support their provincial carbon tax, the highest level of support since the groundbreaking policy was first announced in 2008. And elsewhere across the country, six in ten (59%) Canadians would support a B.C.-style carbon tax in their province as a way to address climate change.

Immigration

- Canadians continue to hold largely positive views about the current level of immigration to this country. Six in ten (59%) disagree with the view that current immigration levels are too high, and seven in ten (72%) reject the notion that immigrants take away jobs from other Canadians, while eight in ten (83%) say that immigration is good for the Canadian economy. Education level continues to be the primary driver of attitudes about immigration.
- The arrival of illegitimate refugees has been an ongoing source of public concern since the 1980s, but is becoming gradually less so over time. Just over half (55%) of

Canadians now agree that many people claiming to be refugees are not real refugees (unchanged from 2011), with a rising minority (36%) expressing disagreement with this view.

- Canadians' principal concern about immigration continues to centre around the issue of cultural integration. Seven in ten (70%) now agree with the view that too many immigrants do not adopt Canadian values, up marginally over the past year and now at its highest level since the 1990s. Concerns about immigrant integration remain most widespread in Quebec, among rural Canadians and those with less education, but is clearly evident across all segments of the population.

Canada's role in the world

- Eight in ten (82%) Canadians feel positive about their country's role in the world, although this sentiment has declined moderately since 2010. Peacekeeping (20%) continues to be most widely identified as the country's number one contribution to the world, although not nearly to the same extent as just a few years ago. Other contributions (mentioned by smaller proportions) include foreign aid, multiculturalism and accepting immigrants, the economic system, natural resources, being a voice of moderation or neutrality, and human rights/democracy.
- Close to seven in ten (68%) Canadians now have a positive overall opinion of the USA, rebounding over the past year (likely influenced by Obama's re-election), although not back to the high point recorded in 2010. While Canadians appear happy to see a second term for Barack Obama, they are divided on whether this will lead to Americans to finally moving past their current political stalemate to more seriously address their country's challenges.
- Despite China's rapid ascent as an economic and world power, Canadians continue to believe it is the USA (56%) rather than China (41%) that will be the more important country for Canada over the next decade. Moreover, this view has strengthened marginally over the past two years, most noticeably in Quebec and B.C., as well as among Canadians 45 and older.

Social capital

- Canadians are most likely to describe their sense of belonging to their local community as "somewhat" strong (53%), compared with 28 percent who say it is "very strong", and those who describe it as "somewhat" (15%) or "very" weak (3%). Close community connection tends to be stronger among older Canadians, rural residents, and those who have lived at the same address for longer periods.
- Just over half (55%) of Canadians believe that most people can be trusted, a decline over the past decade that has taken place across most of the population (excepting B.C.). Despite this trend, Canadians are as likely as they were a decade ago to have confidence in recovering a lost wallet containing \$200. As before, people are most likely to believe a lost wallet would be returned if found by a police officer (72%), compared with someone who lives close by (47%), a clerk in the nearest grocery store (46%) or a complete stranger (12%).
- Social capital (as measured by a combination of all indicators) varies noticeably across the country: it is strongest in Toronto as well as in rural communities, among high income Canadians and those aged 60 plus. Social capital is weakest in Quebec, among Canadians under 30, and those with the lowest levels of education and income,

The Economy and Standard of Living

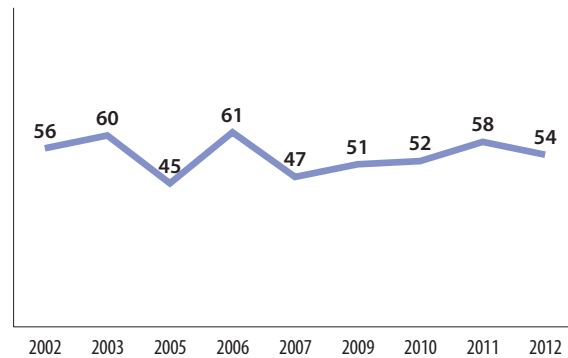
Direction of country and national economy

DIRECTION OF COUNTRY. Few would say that 2012 was a banner year for Canada. In most parts of the country, the economy has remained sluggish, personal incomes have stagnated, governments have failed to meet public expectations on many fronts, and the beloved NHL season was delayed by an acrimonious contract dispute between players and owners. Despite all of this, Canadians continue to be more satisfied (54%) than dissatisfied (42%) with the general direction of the country today. This proportion is down marginally from a year ago (when 58% expressed a positive view), but higher than it has been for much of the past decade.

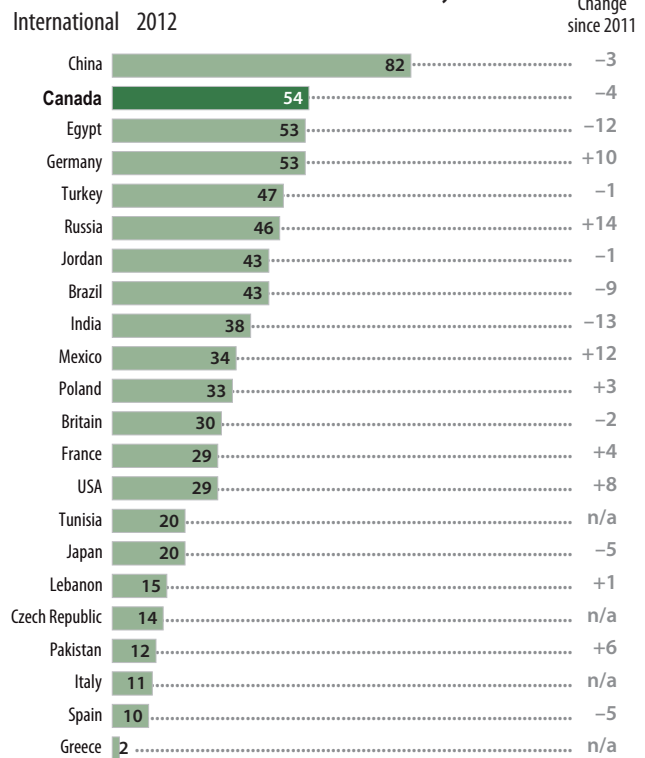
The downward trend since 2011 is most evident in B.C. (reversing a previous upward spike), Montreal, among women and Canadians with lower incomes, while the outlook has improved in Manitoba and Saskatchewan. Residents in the three Prairie provinces (69%) and immigrants from outside the USA/Europe (69%) remain the most satisfied with the country's direction, while Quebecers (42%) and low-income Canadians (38%) are the least so.

Internationally (based on a March 2012 Pew Research Center survey), Canadians are now the second most satisfied with the direction of their country among 22 nations, once again trailing urban China (82%). Canada is just ahead of Egypt (53%) and Germany (53%), and well ahead of the USA (29%). At the bottom of the list for 2012 are Italy (11%), Spain (10%) and Greece (2%).

Satisfied with the way things are going in the country today
2002 – 2012



Satisfied with the direction of the country



Note: International data from Pew Research Center

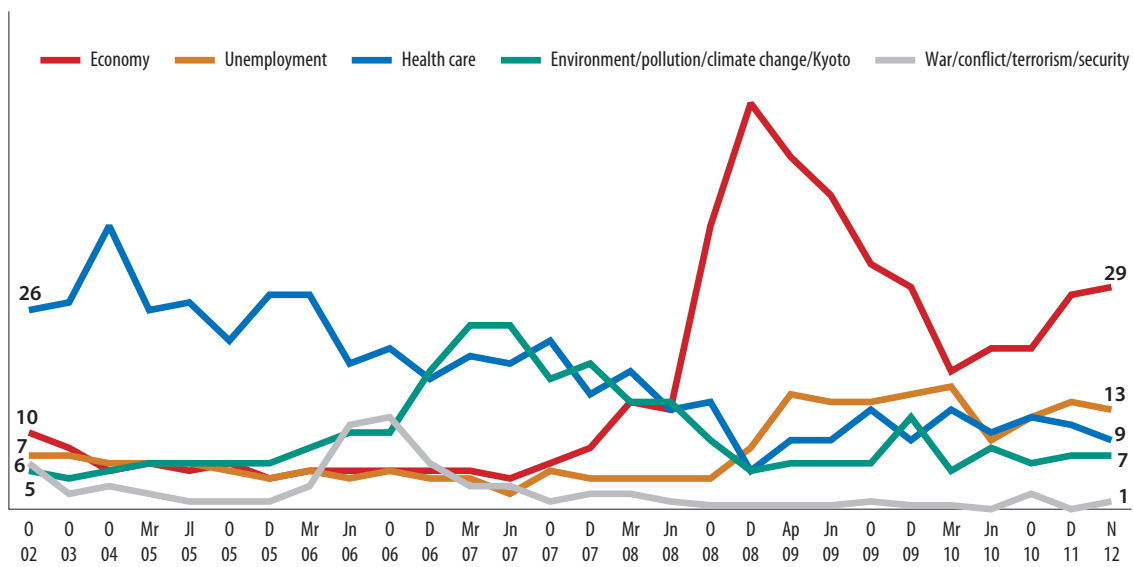
Q.1

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

MOST IMPORTANT ISSUE. What Canadians identify, top-of-mind, as the most important issue facing the country today is essentially unchanged from 12 months ago. More than four in ten continue to cite economic concerns, including the economy generally (e.g., the recession, interest rates, public deficits and debt) (29%) and unemployment (13%). Following well behind is health care (9%), poor government leadership (9%), environment and pollution (7%), and poverty/homelessness (2%) – all essentially unchanged over the past two years.

The absence of a national trend masks a significant regional shift. Concerns about the economy have increased noticeably over the past year in eastern Canada (as well as in rural communities), while declining in Ontario and the west. Health care is most likely to be identified in Alberta and Manitoba, poor government stands out in Quebec, while the environment is most apt to be named by Quebecers and British Columbians.

Most important problem facing Canadians today
2002 – 2012



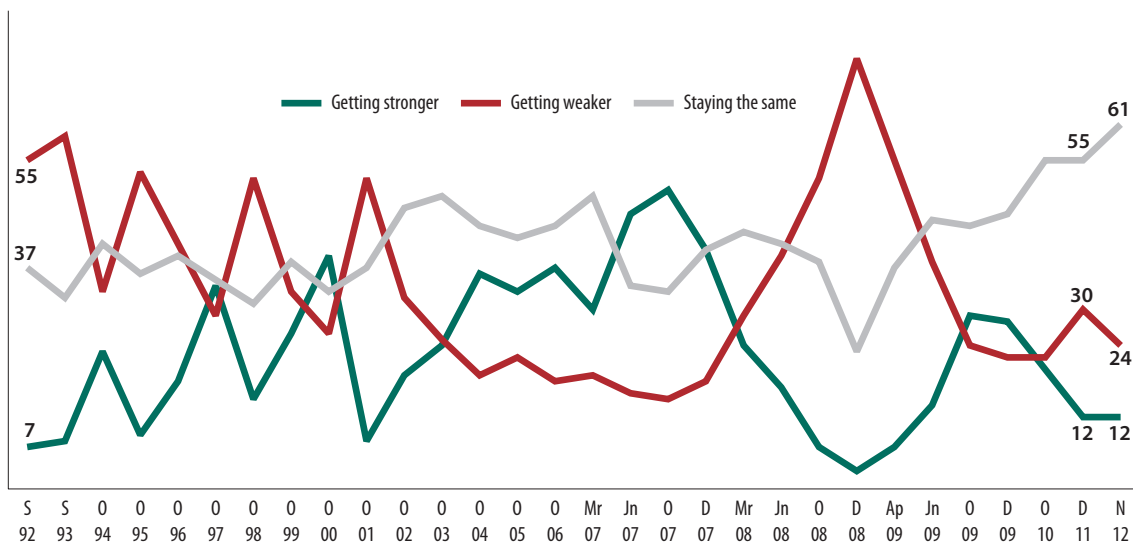
Q.2
In your opinion, what is the most important problem facing Canadians today?

STRENGTH OF THE CANADIAN ECONOMY. The past year has not given Canadians any greater confidence in the strength of the national economy, but they are now less likely than before to believe it is getting worse. One in ten (12%) continue to see the economy growing stronger (unchanged from 2011), while the majority (61%, up 6 points) say it is staying the same, compared with one in four (24%, down 6) who feel it is getting weaker.

Quebecers continue to be the most pessimistic about the national economy (especially so in Montreal, where 41% now say it is getting weaker), while the most positive views can be found in the Prairies – although even here only one in five (20%) describe the national economy as strengthening. Those with household incomes of less than \$60K are more likely than those with higher incomes to say the economy is getting weaker. Over the past year, positive views of the national economy declined among the country’s allophones, who in 2011 were the most positive linguistic group in the country.

Strength of the Canadian economy

1992 – 2012



Q.3

In your opinion, is the Canadian economy getting stronger, weaker or is it staying about the same?

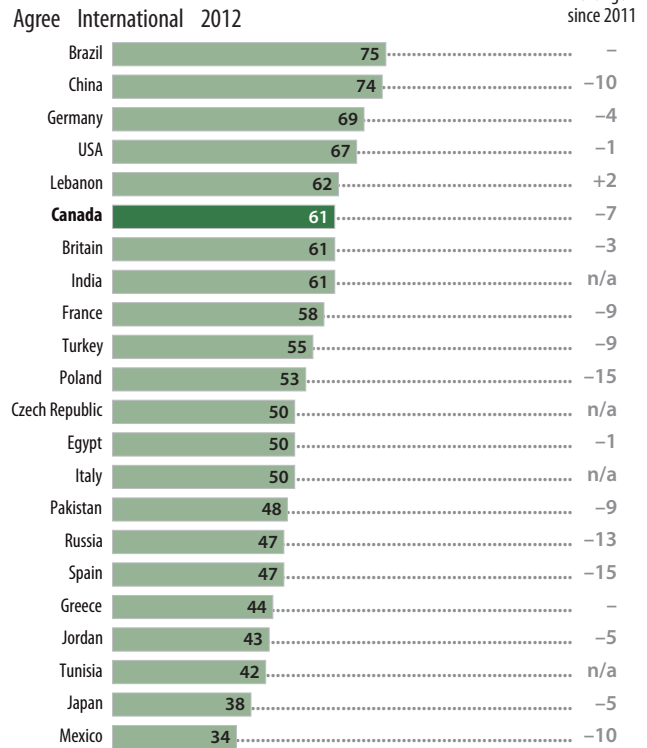
CONFIDENCE IN THE FREE MARKET ECONOMY.

While Canada successfully weathered the global recession, Canadians' faith in free market capitalism has declined over the past two years. Six in ten completely (13%) or mostly (47%) agree that **"Most people are better off in a free market economy, even though some people are rich and some are poor,"** down from 68 percent in 2010, and now at its lowest point since 2002 (when it also stood at 61%). One-third mostly (25%) or strongly (8%) disagree with this statement.

Public confidence in the free market economy has declined across the country, but most noticeably in Manitoba (down 14 points) and Alberta (down 11). This trend is evident among both the rich and poor, but the gap between them has widened over the past two years: Canadians with the lowest incomes are now evenly split on whether or not they have faith in market capitalism (46% versus 47%), while those at the top income bracket are mostly positive in their view (71% versus 25%).

Internationally (from Pew Research), Canada is now tied for sixth place out of 22 countries, along with Britain and India, and just behind Lebanon, the USA, and Germany. At the top of the list are Brazil (75%) and urban China (74%), while faith in the free market system is lowest in Mexico (34%) and Japan (38%). Confidence levels are down since 2010 in most countries, most notably Poland, Spain and Russia, but also in urban China, France and Turkey.

Are people better off in a free market economy?



Note: International data from Pew Research Center

Q.10

Please tell me whether you completely agree, mostly agree, mostly disagree or completely disagree with the following statement: *Most people are better off in a free market economy, even though some people are rich and some are poor.*

Standard of living

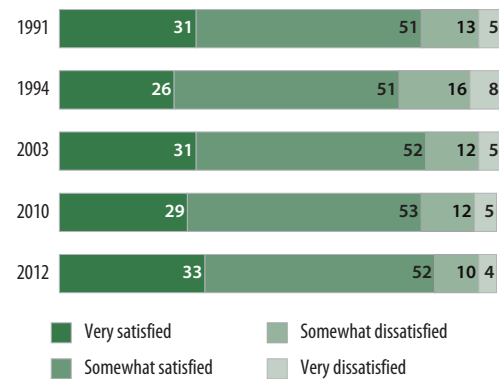
SATISFACTION WITH STANDARD OF LIVING. Despite persistent concerns about the economy and unemployment, Canadians have never felt better about their own standard of living. One-third (33%) now report strong satisfaction with their standard of living, up four points since 2010 and now at its highest level since 1991 when this question was first asked. More than half (52%) continue to say they are somewhat satisfied, while fewer than one in six now report being somewhat (10%) or very (4%) dissatisfied with their standard of living (down 3).

Strong satisfaction has increased most noticeably in Ontario and the Prairies, and is now most evident in Saskatchewan (50%) and least so in Quebec (19%), although the proportion that are dissatisfied is essentially the same in both provinces. More surprising is that the improvement since 2010 has taken place almost entirely among Canadians under 45 years of age, who are now more likely to express satisfaction with their standard of living than those in older cohorts.

Predictably, the greatest divide in satisfaction with experienced living standards is across income strata, and this gap continues to increase. All of the gains in strong satisfaction since 2010 have taken place among Canadians with household incomes of \$60K or more, while among those earning less than \$30K more than one-third (35%) are now dissatisfied. The income gap in satisfaction with standard of living is now at its highest point since this was first measured by Focus Canada in 1991.

Satisfaction with standard of living

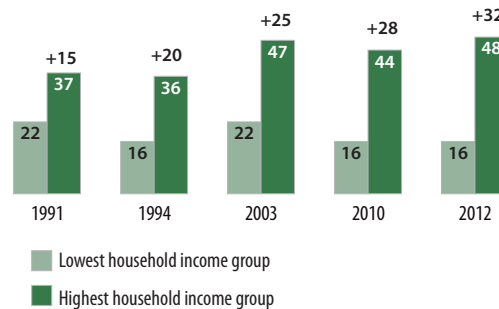
1991 – 2012



Very satisfied with standard of living

Gap between lowest and highest income groups

1991 – 2012



Q.4

Are you very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with your own standard of living?

SOCIAL CLASS. Canada is not considered a class-based society (in comparison with such countries as Great Britain), but in reality there are clear differences defined primarily by income and wealth, but also signified by education. The term “middle class” is widely used in politics to describe the most typical group of Canadians.

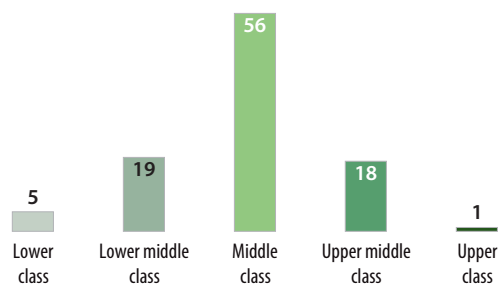
In 2012, Focus Canada asked Canadians to place themselves into one of several social class categories. Just over half (56%) describe themselves as “middle class,” compared with one-quarter who say they are lower middle (19%) or lower class (5%), and one in five who consider themselves to be upper middle (18%) or upper (1%) class (another 1% are unable or unwilling to categorize themselves in this way).

As would be expected, self-identification into social classes is strongly linked to household income. Canadians identifying as lower class are principally those earning household incomes of less than \$30K (70% of this income group), while the upper class group is weighted towards those earning at least \$100K (42%). But the “middle class” designation is more evenly distributed across income strata, and is as likely to be used by those in the \$100K plus income group as those earning \$30 to 60K.

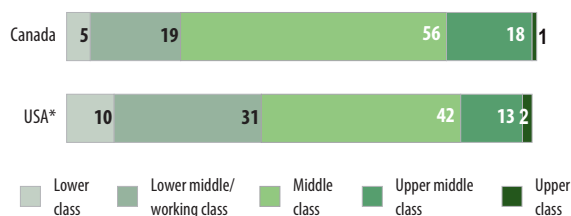
Very few Canadians in any group identify themselves as “upper income,” but the “upper middle class” designation is somewhat more common in Quebec (especially in Montreal at 25%), among men and supporters of the federal Liberal Party. Self-identification as “lower class” or “lower middle class” is most common in Atlantic Canada and B.C., among rural residents, Green Party supporters and those with less education (including 52% of Canadians who do not have a high school diploma).

Canadians’ self-identification of social class differs somewhat from that of Americans (based on a 2012 Gallup survey). Canadians are more likely to categorize themselves as “middle” or “upper class,” and less likely to consider themselves as “lower” or “working class.” The number of Americans identifying as middle class has diminished gradually since 2001 when it stood at 48 percent.

Self-identified social class 2012



Self-identified social class Canada and USA 2012



* Gallup, 2012

Q.5

If you were asked to use one of the following commonly used names for the social classes, which would you say you belong in...?

GENERATIONAL EXPECTATIONS. The 20th century expectation that each generation will be better off than their parents is becoming more difficult to maintain in the face of slow economic growth, an increasingly turbulent global economy and high youth unemployment. Yet Canadians' perspective on how they are doing relative to their parents remains positive, and even stronger than it was 16 years ago. Just over half (52%) feel they are better off financially than their parents (unchanged from 1996, although lower than in 1990), while a declining proportion (24%) say they are worse off, and a similar percentage (23%) judge themselves to be about the same.

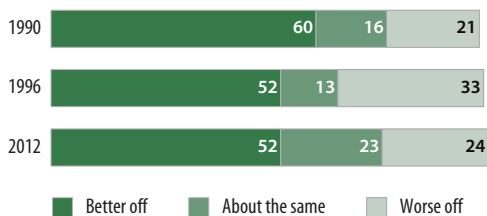
The pattern of change is similar across the population, but the overall improvement since 1996 is less evident among older Canadians and those with lower incomes. Canadians earning the lowest incomes (28%) are much less likely than those at the top (64%) to say they are better off than their parents, and this gap has increased marginally since 1996, suggesting there has been limited economic mobility across socio-economic strata over the past 16 years.

Looking forward, Canadians are not nearly as optimistic about the future financial prospects of their children. Only one in four (25%) expect the next generation to be better off once they reach their own age (half the number who themselves feel better off than their parents), and 38 percent anticipate they will be worse off, while another 33 percent say their children will likely be in about the same financial shape as themselves.

While not encouraging, this outlook is more positive than the one expressed in 1996 (during improving economic times), when only 19 percent expected the next generation to be better off, compared with 56 percent who said they would be worse. Improved financial well-being for the next generation is most widely anticipated by immigrants from outside the USA/Europe and Canadians describing themselves as "lower class," while a lower standard of living for today's youth is most apt to be expected by Ontarians, Canadians without a high school diploma, and those aged 45 years and older.

Americans are evenly divided about whether they think it is likely (49%) or unlikely (50%) that the next generation of youth in their country will have a better life than their parents (based on a December 2012 Gallup survey). This assessment is slightly more positive than in early 2011, but much less so than opinions expressed over the past decade or more.

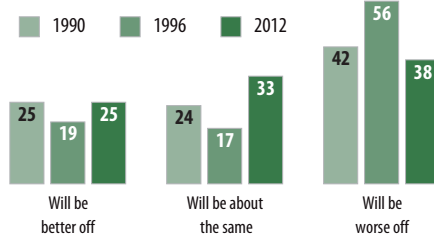
General prospects compared to parents 1990 – 2012



Q.6

Financially speaking, do you feel that you are better off, worse off or about the same as your parents were at your age?

Prospects for the next generation 1990 – 2012



Q.7

And do you think the next generation – for example your children, nieces or nephews – will be better off, worse off or about the same when they become your age?

Household debt

MONEY OWED ON CREDIT. Economic indicators published by banks and governments show rising levels of household debt that continue to set new record levels, but this trend does not appear to have had any impact on what consumers believe they can afford in terms of credit cards and installment loans (excluding mortgages).

The proportion of Canadians reporting they owe a lot more (6%) or a little more (13%) than they can afford is essentially unchanged from December 2008, and marginally lower than the levels reported in July 2005. Three in ten (30%) say they currently owe about the same as they can afford (unchanged since 2008), while half indicate they owe less than they can afford (31%) or have no debts (20%).

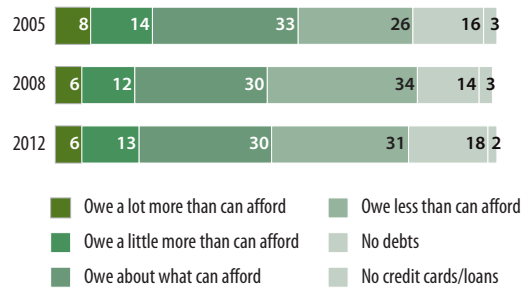
As before, it is low-income households that are most likely to report owing more than they can afford, but they are also less likely than others to carry any debt. It is among top-income households where the proportion owing more than can be afforded has grown noticeably since 2008. Across the country, owing more than is affordable is most evident among women, and residents of Atlantic Canada and Alberta. The absence of household debt is most widely reported in B.C., and by Canadians aged 60 and older.

CONCERNS ABOUT DEBT. While personal assessments are holding steady, Canadians are a bit more concerned about what they owe (perhaps due to warnings from bank economists and the federal government). Close to four in ten say they are very (11%) or somewhat (27%) concerned about the amount of debt they and others in their household are carrying (up 4 points from 2008), compared with those who are not very (24%) or not at all (37%) concerned.

Since 2008, increased concern about household debt levels is most evident in Atlantic Canada, Saskatchewan and Alberta, and among Canadians in the middle-income brackets. Strong concern about household debt is only marginally higher among those at the bottom of the income scale (19%). As would be expected, the level of concern about household debt is tightly linked to how much is owed. Strong concern is expressed by more than half (56%) of those who owe much more than they can afford, declining to 29 percent among those who say they owe a little more, and down to only six percent among those who say their debts match what they can afford to carry.

Current outstanding credit and loan debt

2005 – 2012

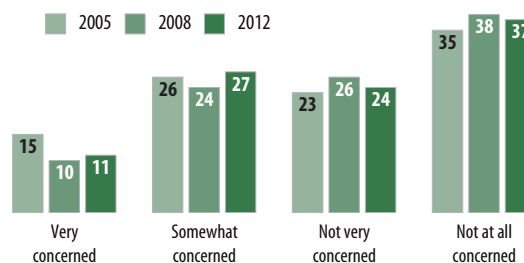


Q.8

Thinking about the money you owe on credit cards and installment loans, excluding your mortgage, would you say you...?

Concern about household debt

2005 – 2012



Q.9

And how concerned are you with the amount of debt you and others in your household are currently carrying; that is, what you owe on loans, mortgages and credit cards? Are you...?

Canadian Identity and Symbols

Pride in being Canadian

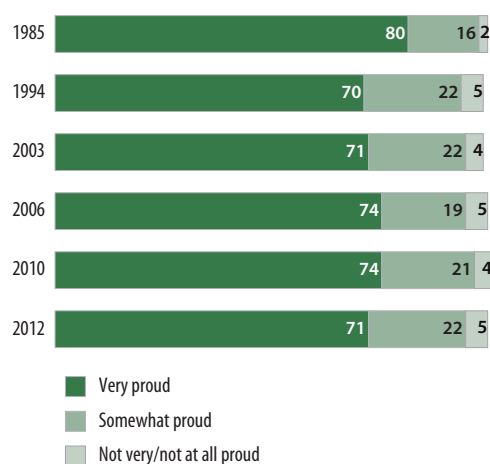
Canadians have long expressed pride in their country. A strong majority (71%) now say they are very proud to be Canadian, although this proportion is down marginally since 2010, reflecting the first decline since 1994. Among the minority that do not share this feeling, most (22%) say they are “somewhat proud,” while very few (5%) continue to be not very or not at all proud of their national identity.

The decline since 2010 has taken place in a number of provinces, including Quebec, Saskatchewan, Manitoba and B.C., while increasing marginally in Ontario and Alberta. Feelings of strong pride are now most widespread Alberta (87%), followed by Ontario (85%) and Atlantic Canada (82%), as well as among Canadians aged 60 plus, and supporters of the federal Liberal and Conservative parties. In the past two years, strong pride has also declined among younger Canadians, and the gap between the youngest (58%) and oldest (84%) Canadians is now at an historic high.

Of most significance is the divergence between Quebec and the rest of the country. For close to 30 years, roughly eight in ten Canadians living outside of Quebec have expressed strong pride in their country, with a minor dip in the 1990s during a protracted period of constitutional squabbling. Quebecers have always been less likely to share the same feelings about Canada, but the proportion expressing strong pride has been dropping steadily and the gap with other Canadians is now the largest yet recorded.

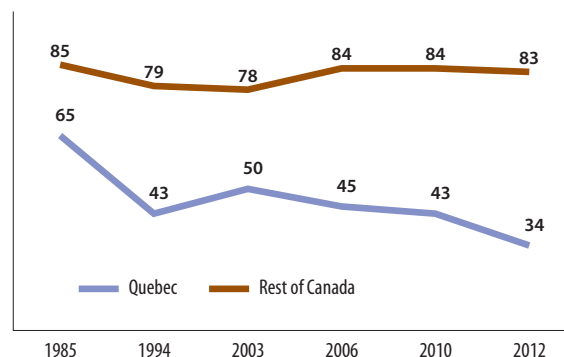
How proud are you to be a Canadian?

1985 – 2012



Very proud to be a Canadian

1985 – 2012



Q.14

Would you say you are very, somewhat, not very or not at all proud to be a Canadian?

What is it about Canada that gives people the greatest sense of pride? First and foremost, Canadians identify their country as being free and democratic (26%), essentially unchanged since 2010 and consistent with what they have identified since 1994. Other reasons have also remained largely stable over the past two years and include Canadians being a humanitarian and caring people (9%), multiculturalism (7%), the beauty of the country/land (6%) and the health care system (4%). The most notable change since 2010 is a decline in mention of the country's quality of life/standard of living (5%, down 5 points).

Reasons for pride in the country are largely similar across the population. Focus on freedom and democracy is most apparent among Atlantic Canadians and Albertans, rural residents and those aged 60 plus, while the beauty of the land is emphasized by Quebecers.

Attachment to Canada

Canada is one of the world's most decentralized nations, and citizens belong to both the country and a province. To which do they more closely identify?

On balance, Canadians are more likely to consider themselves a citizen of their country (57%) than their home province (39%). Nationally, these numbers are unchanged since 2010, but there have been notable shifts at the provincial level: Residents in Alberta and Saskatchewan are increasingly likely to identify more closely with the country, while those living in B.C. (especially Vancouver) and Manitoba have shifted towards identification with their province.

Atlantic Canadians more likely than others to insist their attachment is equally to both (or neither) jurisdiction. National attachment continues to be most widespread in Ontario (71%), while provincial attachment is strongest in Quebec (58%), both unchanged from 2010. Quebecers have consistently identified more with their province than with Canada – but unlike with pride in the country, this gap has not been steadily widening over time.

Basis of pride in being Canadian

Top mentions 1994 – 2012

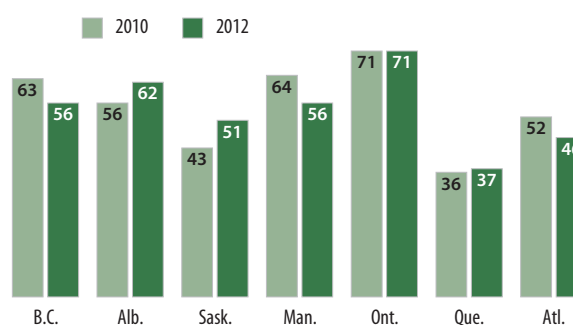
	1994	2003	2006	2010	2012
Free country/freedom/democracy	31	28	27	27	26
Humanitarian/caring people	9	13	9	9	9
Multiculturalism	3	6	11	6	7
Beauty of the land	7	4	4	4	6
Quality of life	5	6	3	10	5
Health care system	–	3	2	6	4
Respected by other countries	4	3	4	2	4
Peaceful country	7	5	6	4	3
Social programs	3	2	1	3	2

Q.15

What is it about Canada that gives you the greatest sense of pride?

Identify more with country than with province

By Province 2010 – 2012

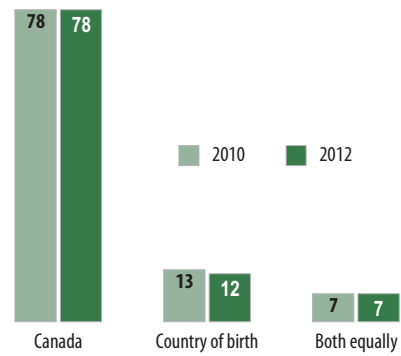


Q.11

Do you feel that you are more a citizen of Canada or more a citizen of [province]?

What about the attachment of the one in five immigrant Canadians – would they identify at some level with their country of birth? Among Canadians who were born in another country, eight in ten (78%) continue to say they feel a stronger attachment to Canada (unchanged from 2010), compared with 12 percent who identify more closely with their country of birth. Another seven percent insist they feel equally attached to both.

Immigrant identification with Canada vs. country of birth 2010 – 2012



Q.13

Do you feel a stronger attachment to...?

Subsample: Those who were born outside Canada

Canadian symbols

Every country has symbols that are key to national identity. The latest Focus Canada survey reveals that Canadians continue to place strong importance on a number of established symbols, but the strength of this identification has declined in almost all cases since 2010, after having previously been on the rise. In most cases, opinions have reverted back to 2003-2007 levels.

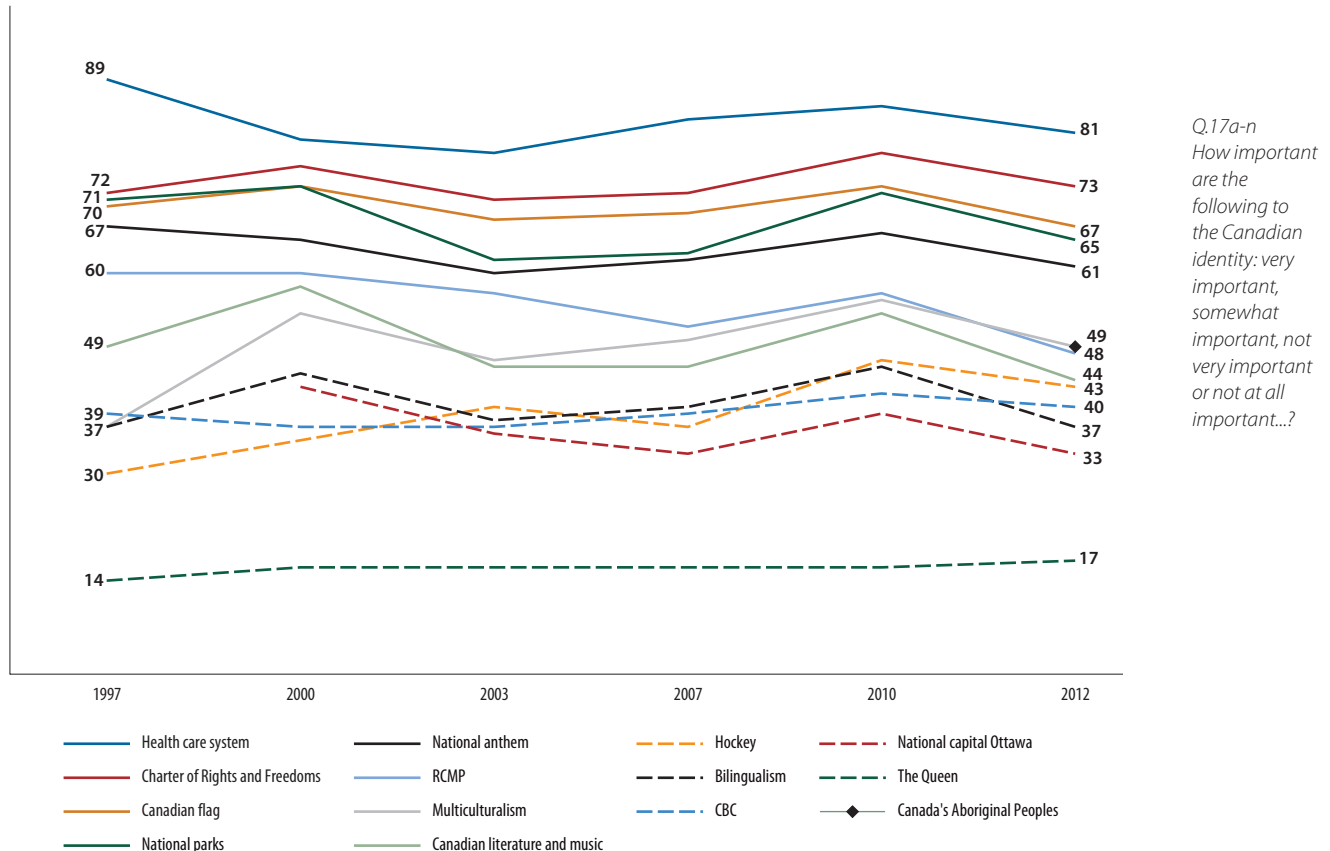
At the top of the list continue to be the country's health care system (81% say very important), followed by the Charter of Rights and Freedoms (73%), the Canadian flag (67%), National Parks (65%) and the national anthem (61%). Fewer than half place such importance on multiculturalism (49%), Canada's Aboriginal Peoples (49%, new this year), the RCMP (48%), Canadian literature and music (44%), hockey (44%), the CBC (40%), bilingualism (37%) and the national capital in Ottawa (33%). As before, Canadians are least likely to place great importance on the Queen (17%) as a symbol of Canadian identity.

The general decline in the importance of national symbols since 2010 is evident across the country, but in many cases is most significant in Quebec (notably for multiculturalism, the flag, the Charter, health care and the national anthem). Quebecers have consistently been less likely than other Canadians to place strong importance on all of the symbols rated, with the exception of bilingualism.

The other noteworthy shift over the past two years is a widening generational gap in the importance placed on what might be considered the traditional symbols of Canadian identity. Canadians aged 60 plus are increasingly more likely than those under 45 to identify strongly with such symbols as the flag, the national anthem, the RCMP, health care, the CBC and the Queen. Canadians under 30 are the most likely to place strong importance on bilingualism, multiculturalism and the Charter, but these ratings have declined since 2010 (in some cases more significantly than for older cohorts).

Importance of symbols to Canadian identity

Very important 1997 – 2012



The importance placed on the country's Aboriginal Peoples as a national symbol varies noticeably across the population. Aboriginal Peoples are most widely seen as a very important symbol in B.C. (58%) and Toronto (65%), among immigrants, Canadians with lower incomes, those aged 60 plus, Green Party supporters (78%) and those who feel strongly connected to their local community (61%). By contrast, this view is least apt to be shared by Quebecers and Manitobans (35% each), Canadians in the top income bracket (39%) and those who support the federal Conservative Party (33%).

Canadian values

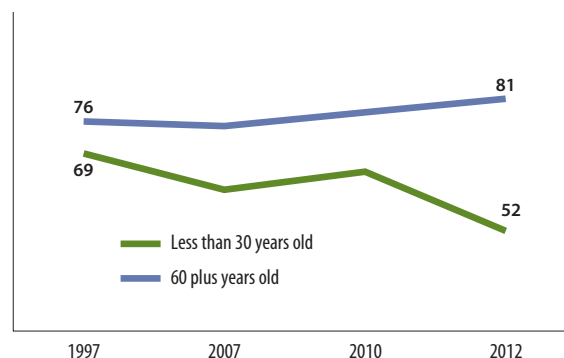
Unlike many countries, Canada lacks a dominant national identity and mythos that everyone can buy into. Despite this, Canadians are more likely than not to feel there is a shared sense of common values that unite them. Two-thirds (67%) agree with the statement *"The values driving Canadian society today are similar to my own,"* up from 61 percent in 2007, reversing a previous decline.

This upward trend is evident everywhere except in Quebec and Manitoba, and is now at the highest level since 2000 in Ontario, Saskatchewan, B.C. and Alberta (where agreement is now the strongest in the country at 72%). The declining level among Quebecers continues a steady trend back to 2000, when they were actually more likely than residents in most other provinces to believe they shared values with Canadian society.

Canadians, however, are less likely to see commonly shared values across specific jurisdictional divisions. Only four in ten (41%) agree that *"Canadians basically have the same values regardless of which province they live in"* (down from 46% in 2007), compared with 56 percent who disagree. This decline is most significant in Manitoba and Quebec, and to a lesser extent in Ontario (while the opposite trend is most evident in Alberta and Atlantic Canada). In 2012, only in Atlantic Canada do a majority feel there are common values across provinces, while this view is now held by only one in four (25%) Quebecers. Canadians aged 60 plus are most likely to agree with this statement, and the gap between young and old has widened since 2007.

Canadian flag is very important to Canadian identity

By age 1997 – 2012

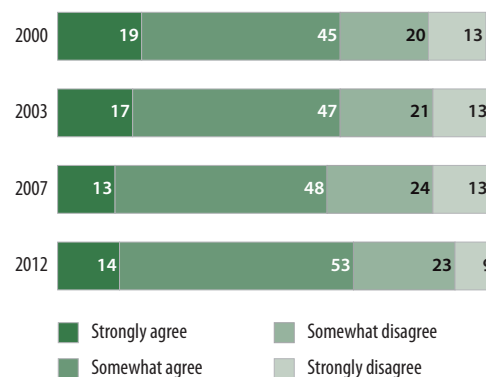


Q.17a

How important are the following to the Canadian identity: very important, somewhat important, not very important or not at all important...?

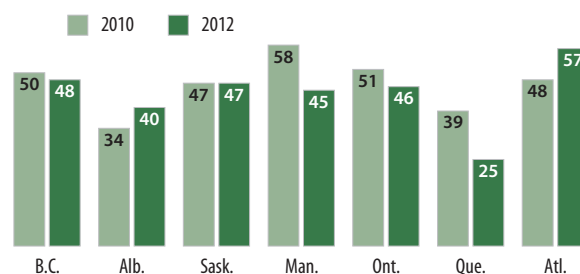
The values driving Canadian society today are similar to my own

2000 – 2012



Canadians have the same values, regardless of which province they live in

Agree by province 2010 – 2012



Q.16ac

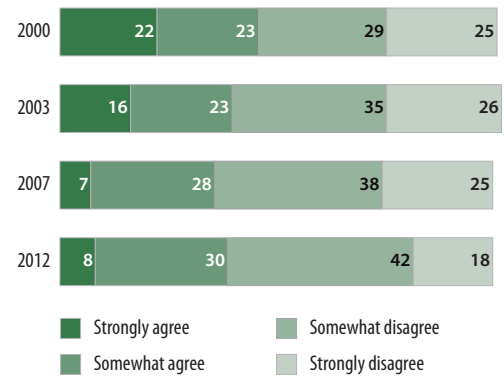
Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements...

Canadians are even less likely to see commonality in the values shared between urban and rural communities. Fewer than four in ten (38%) agree that *“Canadians basically have the same values regardless of whether they live in urban or rural areas,”* up from 35 percent in 2007 and reversing a noticeable decline dating back to 2000.

This latest increase is most evident in major urban centres, and views are now roughly the same across large and small communities. As with the other values statements, belief in common values between urban and rural Canadians is most widely held among the oldest generation, and the gap with younger cohorts has widened over the past decade.

Canadians have the same values, whether they live in urban or rural areas

2000 – 2012



Q.16b

Please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements...

National Governance and Federalism

Effectiveness of government

SATISFACTION WITH SYSTEM OF GOVERNMENT.

Despite a considerable amount of bad press on governments across Canada over the past year, public confidence in the system overall has actually shown marginal improvement. Seven in ten Canadians are now very (20%) or somewhat (51%) satisfied with the Canadian system of government, up three percentage points since 2011 and recovering half of the loss recorded over the previous year.

This upward trend is most evident in Ontario and Quebec, while declining in Atlantic Canada, B.C. and Alberta. Saskatchewan residents (86%) are now the most positive overall about the country's system of government, although Ontarians are the most apt to be very satisfied. Quebecers remain the least positive (9% very satisfied, versus 38% dissatisfied). Satisfaction levels increase along with income and education, as well as age, with the gap between the oldest and youngest Canadians widening over the past year.

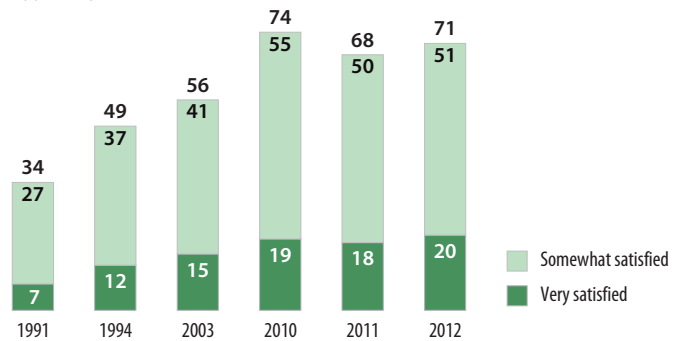
On the political spectrum, satisfaction with our system of government ranges from 85 percent among supporters of the federal Conservatives to 47 percent among Bloc supporters, but levels have improved since 2011 across the board – except among Green Party supporters, who are among the least apt to give positive ratings (53%).

DOES IT MAKE A DIFFERENCE WHICH PARTY IS IN

POWER? Declining voter turnout for elections suggests that Canadians are becoming increasingly apathetic about the political process. And yet, they increasingly believe that it matters which political party runs the government in Ottawa. Two-thirds (67%) of Canadians say this matters, and this proportion has increased marginally over the past two years, continuing an upward trend dating back to 2004.

The view that party differences matter is expressed by a majority across the country, but is most evident in Saskatchewan (73%) and B.C. (71%), as well as among university graduates and immigrants, while least apt to be

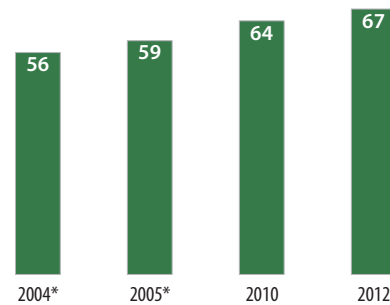
Satisfied with system of government
1991 – 2012



Q.28

Are you very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with the Canadian system of government?

Makes a difference which party is in power in Ottawa
2004 – 2012



*Tracking data from surveys conducted by Environics for the CBC

Q.55

Do you agree or disagree with the following statement: It makes a big difference which political party is in power in Ottawa?

shared by Atlantic Canadians (55%). Views on this question are notably similar across supporters of federal political parties (the range being 69% among Bloc supporters to 75% among NDP supporters), but much less in evidence among those who do not support any party (49%). Belief in the importance of party differences has increased since 2010 among supporters of the NDP, Bloc and Green parties.

Federalism and fairness

DOES OTTAWA FAVOUR ONE REGION OVER

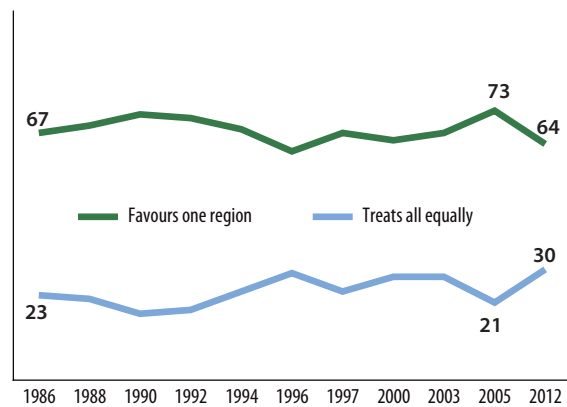
OTHERS? Canada's system of federal transfer payments has long created hard feelings that some provinces have been favoured over others. This view persists, but has declined noticeably since 2005 and is now at its lowest point since 1986 (when this issue was first measured). Fewer than two-thirds (64%) of Canadians now believe that Ottawa favours one region over others (down 9 points since 2005), reversing an upward trend dating back to 2003. By comparison, three in ten (30%) say the federal government treats all regions of Canada equally (up 9), now the highest level recorded.

Since 2005, the declining perception of regional favouritism is most evident in Ontario and western Canada, but most significantly in Alberta (down 28 points), while increasing modestly in Atlantic Canada and Quebec. Ontarians (56%) and Albertans (57%) are now the least likely to believe the federal government plays favourites, while this view is most widely held in Atlantic Canada (78%).

Across the political spectrum, it is Canadians who support the federal NDP (79%) and Bloc Québécois (80%) who are most apt to see regional favouritism by the federal government, and in both cases this view has strengthened somewhat since 2005. In contrast, federal Conservative Party supporters are now much less likely than before to share this opinion (declining from 86% to 49%).

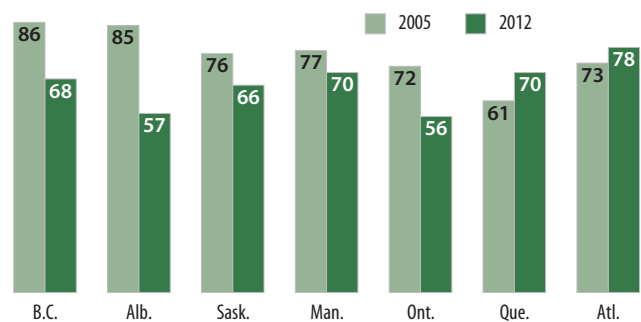
Regional favouritism

1986 – 2012



Ottawa favours one region over others

By province 2010 – 2012



Q.29

In your opinion, does the current federal government treat all regions in Canada equally or does it favour one region over the others?

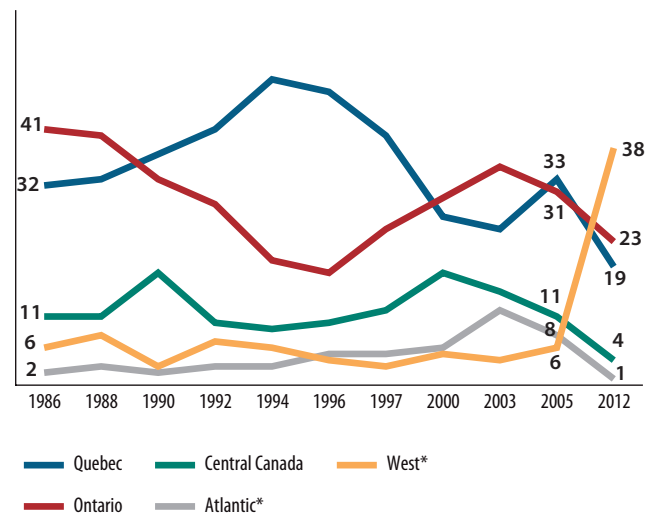
WHICH REGION IS FAVOURED? As always, there are considerable differences of opinion about which region is favoured by Ottawa, and perspectives are dictated in large part by where Canadians happen to live. However, the collective view of regional favouritism has shifted dramatically over the past seven years – which reflects the emergence of western Canada as an economic powerhouse and the base for the ruling Conservative government in Ottawa.

In 2005, the balance of opinion was that central Canada (Ontario and Quebec) was the favoured region (a view held by 75% of Canadians), compared with only six percent who gave this distinction to the west. Seven years later, opinions are now more balanced, with close to four in ten (38%) saying the west receives the most attention from Ottawa (with more than half of this number specifically mentioning Alberta: 22%). A slightly larger, but declining, proportion identify Ontario (23%), Quebec (19%) or Central Canada (4%).

Predictably, Canadians tend to identify a region other than their own as the one most favoured by the federal government, but there have been some notable shifts in opinion since 2005. Alberta is now most widely seen as the favoured region by Quebecers (who previously bestowed this status on Ontario), while Ontario (and not Quebec) is now the region most widely picked by western Canadians.

The views of Ontarians have shifted the least; they continue to be most likely to see Quebec as the favoured region, but less so than before, along with increased focus on the west. Only in Ontario do more than one in ten Canadians see their own province or region as the one most favoured by the federal government (15%, down 6 points since 2005).

Favoured region
1986 – 2012



* Also includes mention of specific provinces

Q.30

Which region do you feel is favoured the most over the others?

Subsample: Those who feel the federal government favours one region over the others

DO PROVINCES RECEIVE BACK WHAT THEY PAY IN FEDERAL TAXES?

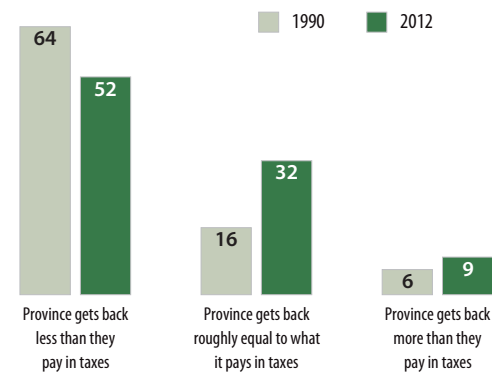
Canadians are still more likely than not to feel their own province gets back less in transfer payments and spending from the federal government than what they pay in, but this view is less widespread than it was two decades ago.

The question asked Canadians to consider the taxes that people in their province pay to the federal government and what the government spends in return through transfer payments, pensions, family allowances, unemployment benefit and other spending. Few (9%) Canadians continue to believe their province gets back *more* than it pays in (up 3 points since 1990), but only half (52%, down 12) now say their province gets back *less*. The balance says their province gets back roughly equal to what it pays in (32%, up 16) or are unable to say either way (7%, down 8).

This shift away from the view that provinces receive back less than they pay in is evident across most of the country, but is most significant in Manitoba, Saskatchewan and B.C., while the opposite trend has taken place in Atlantic Canada. Albertans continue to be the most likely to feel their province loses in the exchange (71%), while residents of Manitoba and Saskatchewan (39% each) are now the least apt to share this view.

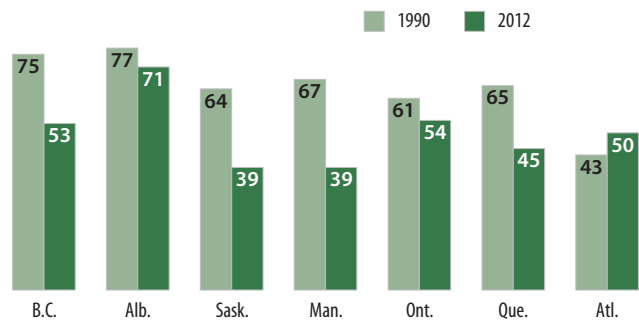
Does your province get back what it pays in federal taxes?

1990 – 2012



Province gets back less than it pays to federal gov't

By province 1990 – 2012



Q.31

I would like you to think for a moment about the taxes which people in your province pay to the federal government and about federal spending returned to the province in the form of transfer payments, pensions, family allowance, government spending and unemployment insurance. Generally speaking, would you say that people of your province get back more than they pay to the federal government, less than they pay or an amount roughly equal to what they pay the federal government?

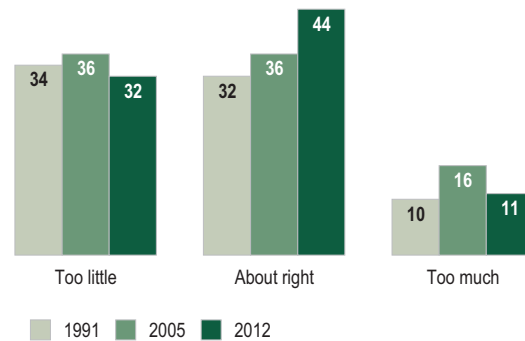
FAIRNESS OF EQUALIZATION PAYMENTS. There is no public consensus on whether the federal government currently transfers too much or too little from better-off to less-well-off provinces, but there is less disagreement with the status quo than in 2005. An increasing plurality (44%, up 8 points) of Canadians believe the transfer amounts are about right, compared with declining proportions who say the better-off provinces give too much (11%, down 5) or give too little (32%, down 4). Just over one in ten (13%, up 1) do not offer an opinion on this question.

Albertans continue to be the most likely to say better-off provinces contribute “too much” in transfer payments (but are less apt to say so than before), while Atlantic Canadians and Quebecers are most apt to say “too little” (Atlantic Canadians are now less likely to express this view). In both Ontario and Alberta, the trend since 2005 has been toward endorsing the current levels of transfers, away from saying they have been “too much” or “too little.” As in 2005, it is lower-income Canadians and those under 30 who are most likely to think that too little is transferred to poorer provinces.

PROVINCIAL-FEDERAL CO-OPERATION. Ongoing disagreements and grievances notwithstanding, most Canadians continue to think their province is better off working co-operatively with the federal government and supporting the policies and plans it puts forward (63%), rather than working independently to develop separate policies and programs (28%). This is essentially unchanged from the view expressed in 2006 (63% versus 32%), and largely similar to opinions expressed as far back as 1988.

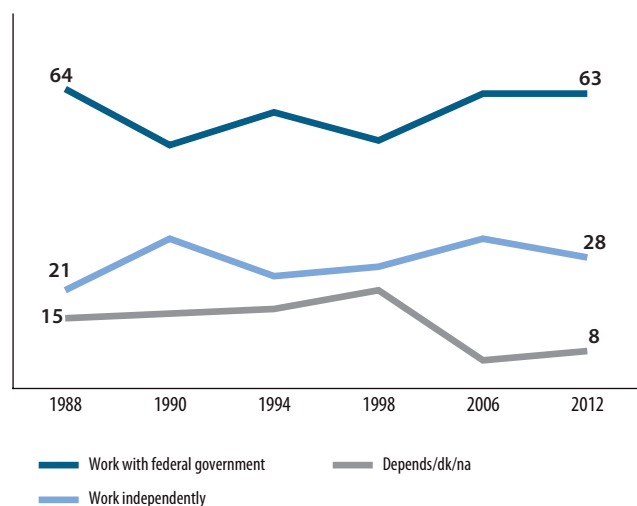
Preference for provincial-federal co-operation is most evident in Ontario (74%), but is the majority view in all provinces except Quebec (where opinions are evenly divided but stable). Since 2006, support for co-operation has strengthened in Alberta, while declining in Atlantic Canada, Manitoba and B.C. Across the political spectrum, a preference for senior government co-operation is strongest among supporters of the federal Liberals (75%) and Conservatives (79%), in sharp contrast to those who support the Bloc Québécois (18%).

Amount of money transferred from richer to poorer provinces
2004 – 2012



Q.32
Do you think that the better-off provinces currently give too much, too little or about the right amount of money to the less well-off provinces?

Should your province work with the federal government or independently?
1988 – 2012



Q.34
Thinking about Canada today, do you think your province would be better off working with the federal government and supporting the policies and plans it puts forward or would your province be better off working independently of the federal government and developing separate policies and plans?

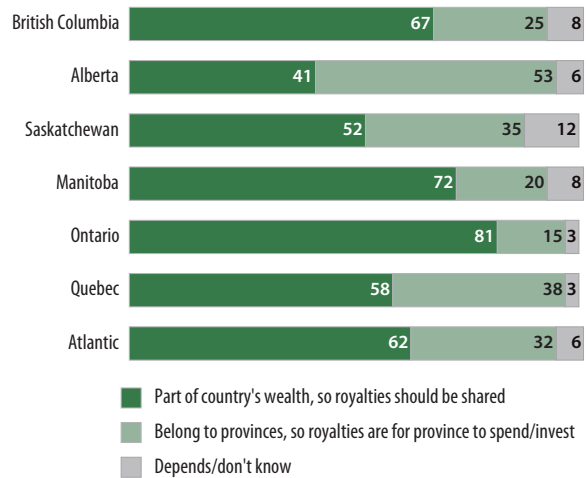
OWNERSHIP OF NATURAL RESOURCES. The country's natural resources are under provincial jurisdiction, but a majority of Canadians believe the benefits they provide should be shared nationally. Two-thirds (67%) agree with the view that natural resources are part of the country's wealth and so the royalties earned should benefit all Canadians, compared with 28 percent who maintain these resources belong to the province where they are found, and this is where the royalties should also be spent or invested.

Predictably, views are shaped in part by the resource base where people live, although in most provinces the balance of opinion is in the same direction. The view of natural resources as a national treasure is most widespread in Ontario (81%) and Manitoba (72%), with smaller majorities in B.C. (67%), Atlantic Canada (62%), Quebec (58%) and Saskatchewan (52%). Only Albertans take the opposite perspective, by a 53-percent to 41-percent margin.

There is also majority agreement across the political spectrum that natural resources are a national wealth to be shared, with the notable exception of Bloc Québécois supporters (who favour provincial control by a 53% to 44% margin).

Ownership of natural resources

By province 2012



Q.33

Natural resource industries like oil and gas, mining and forestry generate significant financial revenue to governments in the form of royalty payments. Which of the following two statements is closer to your own view ...?

Quebec sovereignty

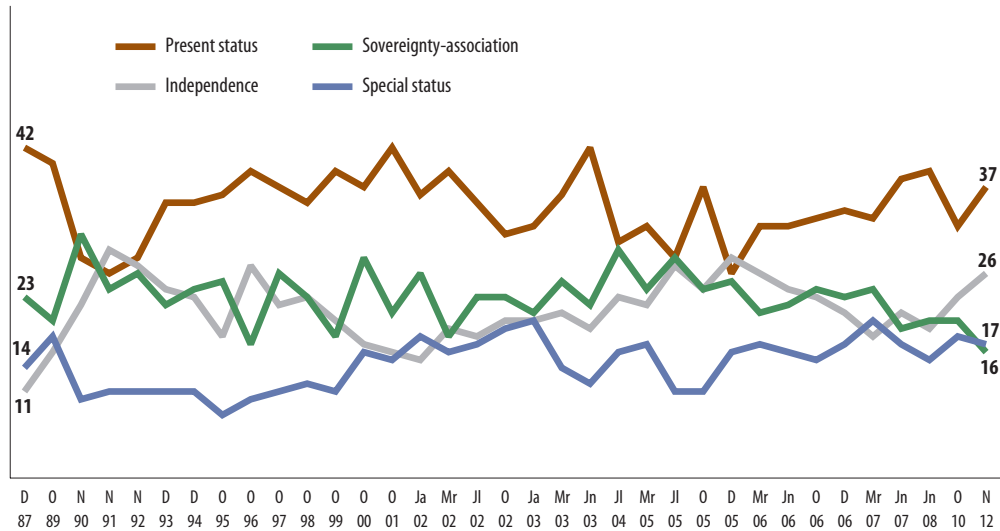
CONSTITUTIONAL OPTIONS FOR QUEBEC.

Quebecers' preferences for their province's place in Confederation have changed relatively little over the past two years, but support has increased marginally for the two clearest constitutional options of maintaining the status quo (37%, up 5 points since 2010) and outright independence (26%, up 3). The two middle options – special status (17%, down 1) and sovereignty association (16%, down 4) – remain less desirable options.

Support for the status quo has partially rebounded from a sharp drop between 2008 and 2010, while support for independence is now at its highest point since March 2006. The independence option increasingly draws its support from Quebecers with the lowest incomes and education, youth and those dissatisfied with the overall direction of the country.

Constitutional options for Quebec

Quebec 1987 – 2012



Q.21

Here are some constitutional options that have been proposed for Quebec. Which one do you think would be best...?

Subsample: Quebec residents

ECONOMIC IMPACT OF QUEBEC SEPARATION.

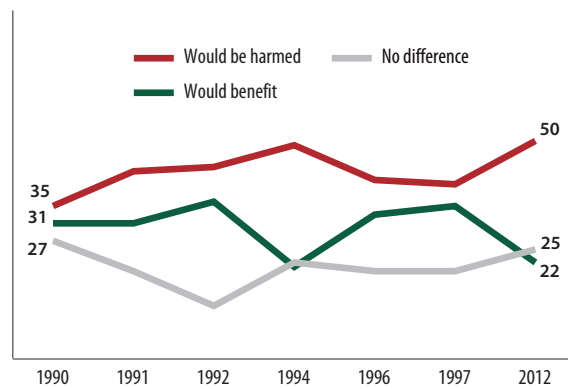
Whatever Quebecers may wish for their future place within Canada, they increasingly see independence as bad for the Quebec economy. Half (50%) now believe that independence would harm the Quebec economy, up 10 points from 1997, and now the highest level since 1994. The remainder are split between those who maintain independence would benefit the provincial economy (22%, down 13) and those who think it would not change much either way (25%, up 7).

The view outside of Quebec is more definitive, with three-quarters (76%) of Canadians in other provinces predicting independence would be bad for Quebec's economy (although down 10 points from 1997), compared with 16 percent who think it would make no difference and three percent who think it would strengthen that province's economy.

What impact would Quebec independence have on the Canadian economy? Citizens outside of Quebec are increasingly concluding that separation would not damage the country's economy; only four in ten (41%) anticipate a negative impact (down 15 points from 1997 and now at its lowest point since 1990). An equal proportion (42%, up 14) expect it would have no impact, while 15 percent (up 6) say it would benefit the Canadian economy. Quebecers share a similar view, but are even less likely than other Canadians to think separation would harm the Canadian economy (36%, down 13).

Effect of independence on Quebec economy

Quebec 1990 – 2012

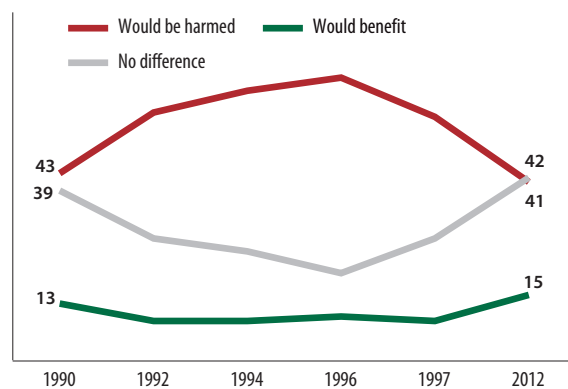


Q.22

If Quebec were to become an independent country, do you think Quebec's economy would benefit, be harmed or would it make no difference?

Effect of independence on Canadian economy

Rest of Canada 1990 – 2012



Q.23

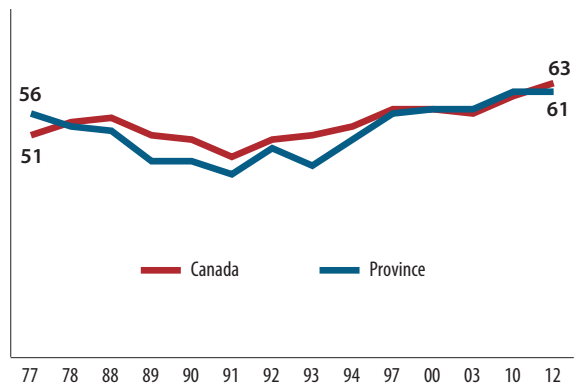
If Quebec were to become an independent country, do you think the economy of the rest of the Canada would benefit, be harmed or would it make no difference?

BILINGUALISM. Bilingualism has been an official national policy in Canada for more than 40 years, but the vision of a truly bilingual country has yet to be realized. Despite its mixed history, public support for the concept of bilingualism is now at an all-time high. More than six in ten (63%) Canadians now say they are personally in favour of bilingualism *for all of Canada*, up from 60 percent in 2010 and at the highest level since Focus Canada began asking this question in 1977.

Support for a national policy of bilingualism continues to be most widespread in Quebec (94%, up 4 points since 2010), but has increased most noticeably over the past two years in B.C. (60%, up 15). Cutting against this trend is Alberta, where support for bilingualism nationally has declined (to 41%, down 10) and is now the lowest in the country. Across the country, support for bilingualism continues to be stronger among Canadians aged 18 to 29 (79%), while lowest among supporters of the federal Conservative Party (46%).

Similar levels of support are also expressed for bilingualism *in one's own province* (61%, unchanged from 2010). Not surprisingly support is strongest in Quebec (82%), followed by Atlantic Canada (65%) and Manitoba (62%). Since 2010, support for provincial bilingualism is up noticeably in B.C. (51%, up 9 points), while declining in Alberta (37%, down 6).

Support for bilingualism in ...
1977 – 2012



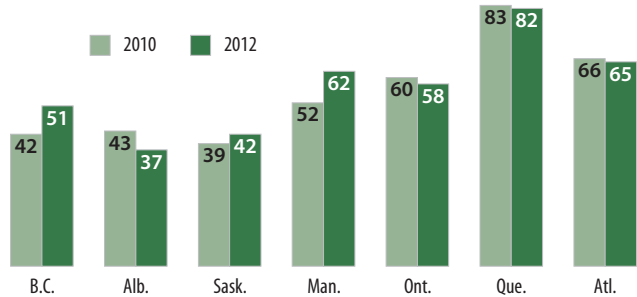
Q.24

As you know, English and French are Canada's two official languages. Are you, personally, in favour of bilingualism for all of Canada?

Q.25

Are you in favour of bilingualism for your province?

Support for bilingualism in own province
By province 2010 – 2012



Q.25

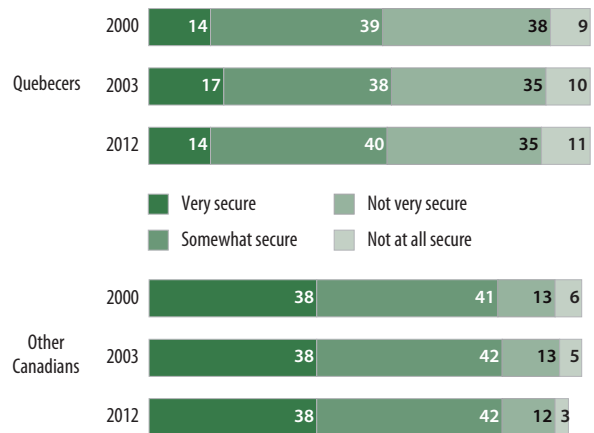
Are you in favour of bilingualism for your province?

SECURITY OF FRENCH LANGUAGE AND CULTURE.

It should perhaps be no surprise that Quebecers and other Canadians have very different perspectives on the future of French language and culture in the country. Just over half of Quebecers feel the security of language/culture *in their province* is very (14%) or somewhat (40%) secure, and this view has held largely steady since 2000. This compares with eight in ten Canadians living in other provinces (38% and 42%, respectively), also essentially unchanged for more than a decade.

There is a similar divide on the question of the future of French language and culture *outside of Quebec*, although both parts of the country are considerably more pessimistic in comparison with the security within Quebec. Among Quebecers, only one in five believe French language and culture are very (3%) or somewhat (17%) secure outside of their province, compared with close to half of those living elsewhere in the country (9% and 38%, respectively). Once again, opinions have remained stable since 2000.

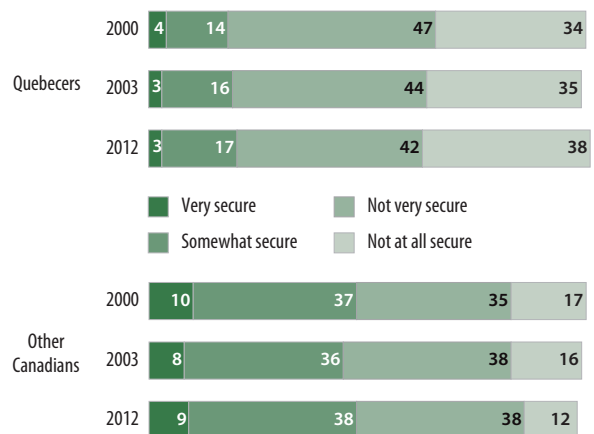
Security of French language and culture in Quebec 2000 – 2012



Q.26

Do you think the future of the French language and culture in Quebec is very secure, somewhat secure, not very secure or not at all secure?

Security of French language and culture outside Quebec 2000 – 2012



Q.27

Do you think the future of the French language and culture outside of Quebec is very secure, somewhat secure, not very secure or not at all secure?

Foreign Investment

Benefits of foreign investment

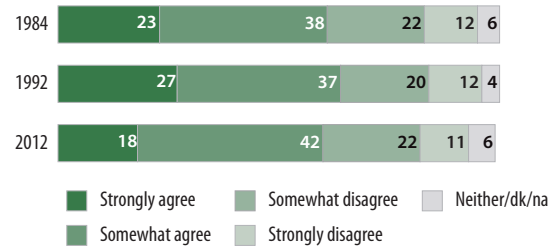
The role and dynamics of foreign investment in an increasingly globalized world have changed dramatically over the past 20 years, yet public opinion about the overall benefits has remained notably consistent. Canadians value the employment benefits of foreign investment, which leads to six in ten who strongly (18%) or somewhat (42%) agree that **“to create jobs, the government should encourage much more foreign investment in this country.”** This is very similar to the views expressed in previous decades (in 1984 and 1992), although the proportion that strongly agree is now lower.

What has changed over the past 20 years is how this issue is viewed in different parts of the country. Since 1992, there has been rising agreement in the importance of foreign investment among Atlantic Canadians (77%, up 13 points), while this view attracts declining support across western Canada (which now ranges from 30% in Manitoba to 46% in Alberta). Opinions are notably similar across socio-economic class.

While Canadians may believe it is important to expand foreign investment as a source of new employment, they are also growing more skeptical about the security of the jobs created through such a policy. Seven in ten (71%) Canadians agree that **“foreign-owned companies are less likely than Canadian-owned companies to protect the jobs of Canadians,”** up from 65 percent in 1992 and 57 percent in 1984.

Increasing concern about the security of jobs created through foreign investment is most evident in Eastern Canada (especially in Quebec where 83% now agree with this statement, up from 62% in 1992), while stable or declining in the west (most notably in Saskatchewan, where only 48% now agree, down 7 points).

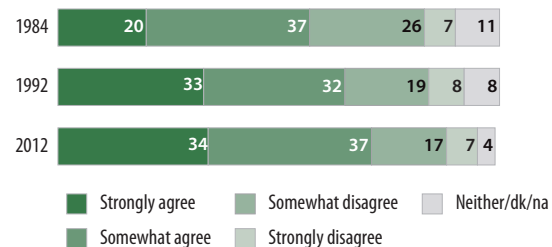
To create jobs, the government should encourage much more foreign investment in this country 1984 – 2012



Q.36a

Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements...?

Foreign-owned companies are less likely than Canadian-owned companies to protect jobs in Canada 1984 – 2012



Q.36b

Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements...?

Canadians also remain skeptical that foreign investment meets a generic “net-benefit” test, with only one-third (34%) agreeing that **“foreign-owned companies contribute more to the economy than they take out,”** largely unchanged since 1984, although overall disagreement is up seven points since 1992. Opinions about the contribution of foreign investment are the most negative in Quebec (especially Montreal), but have declined most noticeably since 1992 in Ontario and Alberta.

Source of foreign investment

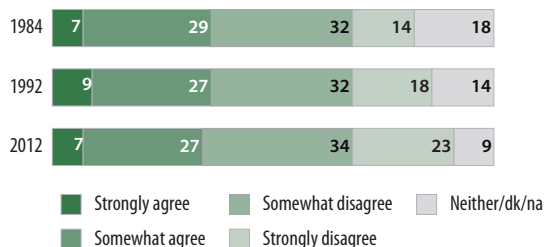
Does it matter to Canadians which countries are the source of foreign ownership of Canadian-based companies? It does in the case of China, likely influenced by the recent controversy over state-owned Chinese companies looking to invest in Canada’s oil and gas sector.

Fewer than half (42%) of Canadians believe Chinese companies should be allowed to purchase and own Canadian-based companies. By comparison, clear majorities endorse such purchases from companies based in the USA (71%), Australia (71%), Germany (68%), France (67%), Brazil (60%) and India (55%).

Across all countries, public support for the foreign purchase of Canadian companies is lower in B.C. outside of Vancouver, among women, Canadians aged 60 plus, and those with lower levels of education and income. Opinions in the Prairies are close to the national average, although Albertans tend to be somewhat more favourable than residents of Saskatchewan and Manitoba. Support for Chinese investments is strongest in Montreal (56%) and among those who support the federal Liberal Party (50%).

Foreign-owned companies contribute more to the economy than they take out

1984 – 2012

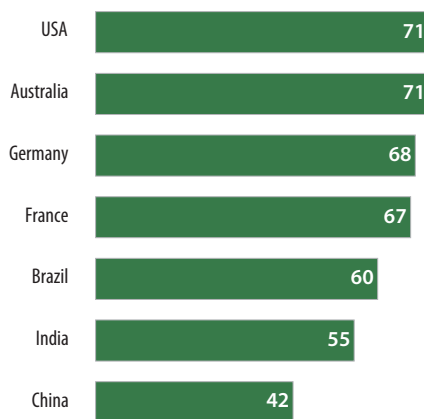


Q.36c

Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements...?

Allow companies based in specific countries to purchase/own Canadian-based companies

2012



Q.37a-g

Do you think that companies based in each of the following countries should or should not be allowed to purchase and own companies based here in Canada...?

Health Care

Canadians have long been proud of their country's public health care system, and consider it to be one of the defining symbols of national identity (confirmed once again on this latest survey). The health care system is also becoming increasingly difficult to sustain, as costs are consistently rising faster than inflation – so that provincial governments are spending proportionately more on health care every year (and less on everything else).

At the same time, health care is often described as “the third rail of Canadian politics,” in that it can be political suicide for leaders to openly raise with citizens and voters the difficult

questions around the sustainability of the system, and the need for new revenue through higher taxes and/or user fees. For this reason, governments have focused on other issues, and health care has virtually disappeared from the policy agenda and the media (except when a scandal breaks concerning misspending or other abuse of the system).

How do Canadians view their health care system today? Is there evidence of growing public concern about the future of the system or willingness to support fiscal reforms to ensure it will be there for them in the future?

Current state of the health care system

IS THE SYSTEM IN GOOD SHAPE OR IN CRISIS?

Despite growing pressures on the country's health care system, public confidence has strengthened since 2010 to an unprecedented level. For the first time since 2002, as many Canadians believe the health care system is basically in good shape (49%) as say the system is in a state of crisis (48%).

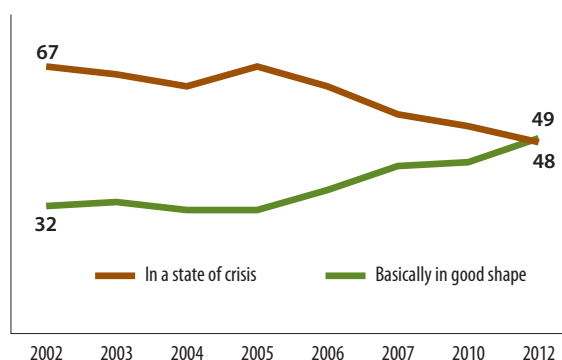
This reflects a positive shift since 2010, and a very different view than was expressed in the 2002 – 2006 period when more than six in ten Canadians described the country's health care system as being in crisis.

This growing confidence is evident across most of the country, but most noticeably in Ontario (where confidence is now the highest at 58%, up 8 percentage points since 2010) and Saskatchewan (53%, up 9), as well as among women, rural residents and those in the lowest income bracket.

A positive view of the health care system continues to be least evident in Quebec (31%, up 6 points), although opinions have also improved in this province over the past two years.

State of the health care system

2002 – 2012



Q.38

Which of the following is closer to your point of view...?

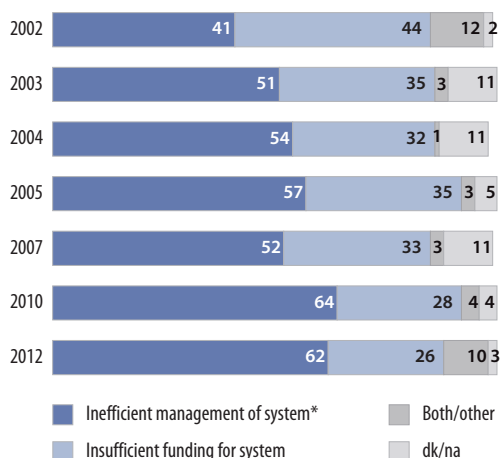
MAIN SOURCE OF PROBLEMS. When asked about the main cause of problems in the health care system, a majority of Canadians continue to point to inefficient management of the system (62%) over insufficient funding (26%). The balance volunteer that both are equally at fault (or identify other problems) (10%) or do not offer an opinion (3%).

Over the past decade, the balance of opinion has shifted clearly to focus on inefficient management over insufficient funding. Since 2010, these opinions have changed little at the national level, but there have been notable shifts across regions.

A focus on inefficient management has increased steadily in Quebec since 2007 (rising from 49% to 80%). Elsewhere in the country, opinions on this question are more divided (30% insufficient funding versus 56% inefficient management), and the emphasis on management problems actually declined since 2010, most noticeably in B.C. and Saskatchewan (both to 53%, down 14 points).

Inadequate funding is the minority view across the population, but is most evident among residents of Atlantic Canada and Saskatchewan, rural residents and Canadians with the lowest incomes.

Main cause of problems in health care system
2002 – 2012



* In 2004, "Inefficient management"

Q.39

In your opinion, are problems in the health care system mainly due to...?

Reforming the system

Canadians are more likely than not to favour having the option to purchase private health care to ensure timely access, and there is widespread support for expanding drug plan coverage. At the same time, opinions are divided on various reforms to control rising health care costs, with delisting services the least popular option.

PURCHASING ACCESS TO PRIVATE HEALTH CARE.

Rising public satisfaction with the current health care system does not mean Canadians oppose changes to health care delivery which are seen as improvements. Timely access to needed services has been one of the public's main concerns, and this translates into modest support for allowing citizens to purchase care outside of the public system if it is not readily available within the system.

A small majority (54%) agree that *“individual Canadians should be given the right to buy private health care within Canada if they do not receive timely access to services in the public system, even if this might weaken the principle of universal access to health care for all Canadians because some people might have quicker access to services,”* compared with 43 percent who disagree.

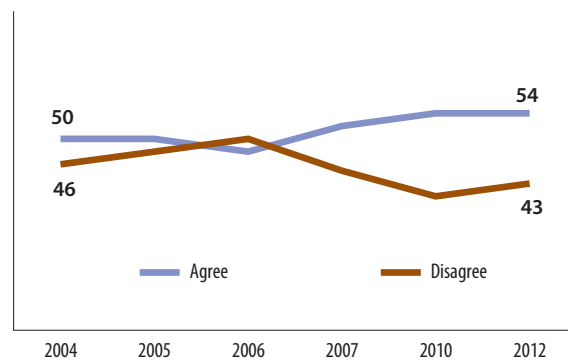
Opinions are unchanged from 2010, and support for the right to buy private health care is up marginally from earlier in the decade.

Support for private health care options continues to be most popular in Quebec (66%), where this view has strengthened over the past two years (as it has in Atlantic Canada), while Ontario (46%) and Alberta (48%) stand out as the two provinces with the lowest public support for buying private health care.

Opinions are generally divided across all groups, but support for private health care is most likely to come from Canadians aged 30 to 44, men and federal Conservative Party supporters, while opposition is most evident among residents of major urban centres, Canadians with a university education and federal NDP supporters.

Canadians should have the right to buy private health care to ensure timely access

2004 – 2012



Q.40

Do you strongly agree, agree, disagree or strongly disagree that individual Canadians should be given the right to buy private health care within Canada if they do not receive timely access to services in the public system, even if this might weaken the principle of universal access to health care for all Canadians because some people might have quicker access to services?

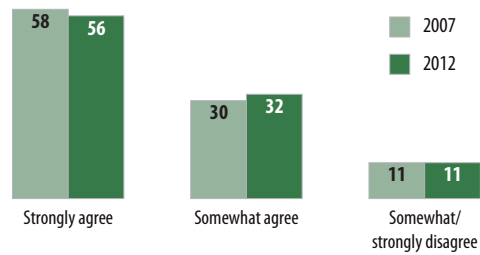
EXPANDING GOVERNMENT DRUG PLANS. One type of change that consistently garners widespread public support is expanding the coverage of pharmaceuticals within the public health care system.

Nine in ten Canadians strongly (56%) or somewhat (32%) agree that *“the government drug plans should provide coverage for any medications that patients and their doctor agree are the most effective treatment,”* unchanged from 2007. Only one in ten (11%) somewhat or strongly disagree with this type of plan.

Expanding drug coverage attracts majority support across the country, but strong agreement is most widespread in Atlantic Canada and Manitoba, among Canadians aged 60 plus and those who consider themselves to be in the lower economic classes, while less evident among residents of Quebec and Saskatchewan, and those placing themselves in the upper classes.

No more than one in six from any group disagree with expanding the coverage of pharmaceuticals within the public health system.

Government drug plans should cover all effective medications 2007 – 2012



Q.42

Please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement: Government drug plans should provide coverage for any medications that a patient and their doctor agree are the most effective treatment.

REFORMS TO CONTROL HEALTH CARE COSTS.

Openness to change is less apparent when it comes to specific reforms for controlling rising health care costs, and the public appetite for such change has not grown over the past decade.

Paying out-of-pocket for faster service. Of the five reforms presented, Canadians are most likely to support having the option of paying out-of-pocket for faster access to hospitals and specialized services (e.g., MRIs, cancer care), where opinions are evenly divided (48% support versus 49% oppose, (unchanged from 2007, and up only marginally from 2002).

Paying a small user fee for every visit. Fewer than half (46%) would endorse a policy of having people pay a small user fee every time they use the health care system, such as for doctor visits or a trip to the emergency room, versus 51 percent who are opposed. Opinions are unchanged over the past decade, but marginally lower than in 2002 (when 50% expressed support).

Paying extra for use beyond allotted amount of care. Four in ten (41%) support allowing people a certain amount of routine health care services every year, and requiring all patients (except those with serious medical problems) to pay extra if they use more than the amount allotted. A majority (56%) oppose this type of revenue policy, with three in ten strongly opposed. Support has declined (down 5 points) from 2007.

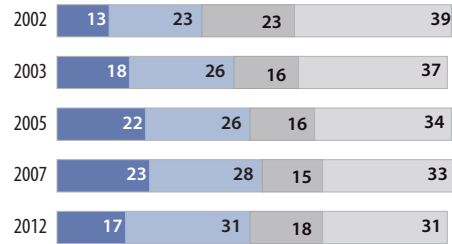
Raising taxes. Taxes are never popular, and only four in ten (42%) express support for raising taxes in order to have more money for health care, versus 56 percent who oppose this way of paying for health care. Support is down marginally from 2007 (down 4 points), reversing a modest upward trend dating back to 2003.

Cutting back on covered services. Canadians are least likely to support controlling health care costs by cutting back on the types of services that are covered by the health care system and currently free to the general public. Only one in four (24%) endorse such a change (down 2 points since 2007), compared with 72 percent who oppose it.

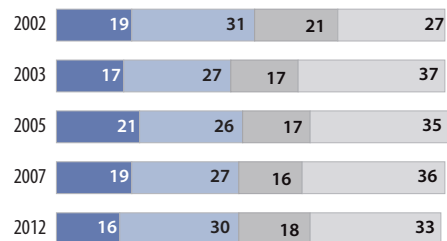
Quebecers are more likely than other Canadians to endorse these types of reforms, with the notable exception of higher taxes, where Quebecers' support has plummeted 25 points since 2007 (to 23%). Elsewhere, public support for higher taxes for health care has held steady (and rising in B.C.).

Support for specific financing reforms 2002 – 2012

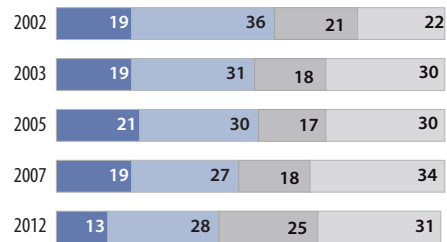
Option to pay out-of-pocket option for faster service



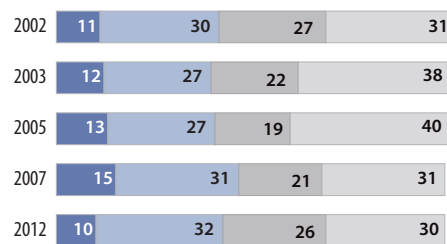
Small user fee for every health care visit



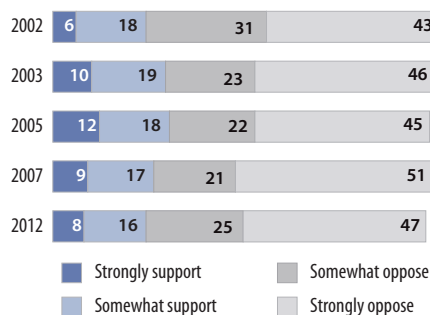
Pay extra for use beyond routine services



Raise taxes to help cover health care costs



Cut back on services offered for free



Q.41a-e
Now, we would like to ask you about different ideas people have to help finance our current health care system. How much do you support or oppose the following? Is that strongly or somewhat?

Climate Change

Global warming or climate change is described by some as the greatest challenge ever faced by human civilization, but over the past year it has commanded strikingly little attention in the mainstream media and in policy/political debates in North America. The increasingly unpredictable and sometimes violent weather patterns experienced in many parts of the continent (which scientists predicted as an outcome of global warming) has not galvanized

an institutional response. It is as if the issue has become yesterday's news, and attention has shifted elsewhere.

Does this mean that Canadian citizens have lost interest or no longer take the issue of climate change as seriously as they did just a few short years ago? The survey included five questions on climate change that serve as key indicators of public opinion about the seriousness of climate change, sector responsibility for addressing the issue and carbon pricing.¹

Science on climate change

IS CLIMATE CHANGE HAPPENING? As has been the case since tracking began in 2007, a majority (57%) of Canadians believe that the scientific evidence about the existence of climate change is conclusive and that it is primarily caused by human activity. This proportion has increased marginally over the past 12 months and is now at its highest point since November 2009 (though still below the peak recorded in March 2007).

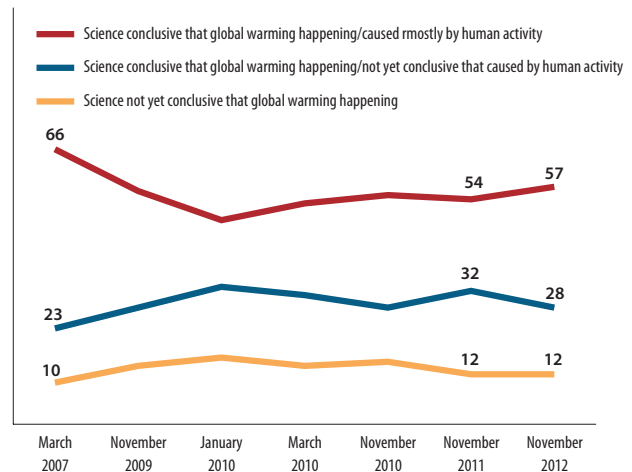
Less than three in ten (28%) now say climate change is real but do not feel the science proves humans are the main cause (down 4 points since 2011), while one in ten (12%) remain skeptical about the scientific evidence (unchanged since 2011, although down marginally from 2010 levels).

Opinions differ somewhat across the country in a predictable pattern. Belief in the science of climate change is most widespread in Quebec (70%), B.C. (61%) and Atlantic Canada (59%), lower in Ontario (51%) and Alberta (50%), and lowest in Saskatchewan (46%) and Manitoba (44%). Since 2011, these proportions have increased in Ontario and B.C., while declining in Quebec and Saskatchewan.

Belief in the science is also higher among younger, urban and educated Canadians, and those who affiliate with the

Science on climate change

March 2007 – November 2012



Q.43

Which one of the following best fits your own view about the latest scientific evidence about global warming...?

federal Green Party or Bloc Québécois, while lowest among those without a high school diploma, 60 years or older, and supporters of the federal Conservatives (23% of whom remain skeptical about the reality of climate change).

¹ These questions were drawn from an ongoing syndicated study (The Canadian Environmental Barometer) which has been conducted by the Environics Research Group since 2007.

DEALING WITH UNCERTAINTY. Canadians who are not convinced of the scientific reality of climate change remain divided on how best to deal with the uncertainty surrounding the issue. Just over half (52%) of this group say we should take strong actions now to reduce the chances of a worst case scenario, while 45 percent think it is best to hold off taking action until stronger evidence emerges of what may happen in the future.

A preference for acting now is more prevalent among Quebecers, women, younger Canadians and Green Party supporters, in comparison with residents in Saskatchewan and Alberta, Canadians without a high school diploma and Conservative Party supporters.

Sector most essential to progress on climate change

A growing majority of Canadians believe that the most essential progress on addressing climate change must come from government standards and regulations, rather than voluntary actions from industry or consumers.

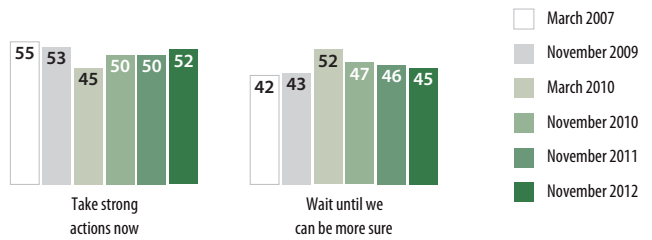
Who does the public look to for making serious progress on tackling climate change in Canada? Over the past five years, Canadians have looked first to government implementing, new standards and regulations (59%); this proportion has increased since 2011 and is now at the highest level yet recorded.

By comparison, the public is less apt to say the most essential actions must come from industry making new investments (17%) or consumers making lifestyle adjustments (10%). Close to one in ten (8%) continue to insist that all three sectors have an equally critical role to play in making progress on climate change in this country.

Government is the most widely looked-to sector across the country, but especially so in Quebec, among Canadians under 45, and supporters of the NDP, Green Party and Bloc Québécois. This also represents the plurality view among Conservative supporters (46%), who are more likely than others to look to either industry (22%) or consumers (18%) to take the lead role.

Best way to deal with uncertainty about global warming

March 2007 – November 2012



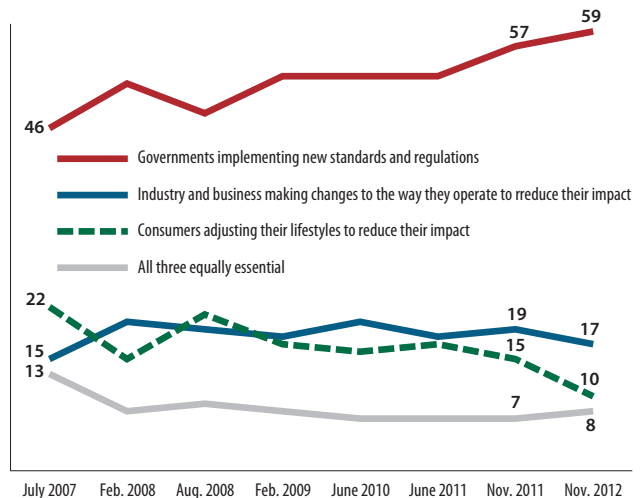
Q.44

Some people believe that the best way to deal with the uncertainty around global warming is to take strong actions now to reduce the chances of a worst case scenario. Other people believe the best way to deal with uncertainty is to hold off taking strong actions until we can be more sure about what might happen in the future. Which of these views is closer to your own?

Subsample: Those who believe that science is conclusive that global warming is happening, but not yet conclusive that it is caused by human activity or that the science is not yet conclusive that global warming is happening

Most essential to making serious progress on climate change

July 2007 – November 2012



Q.45

Which one of the following do you think is the most essential to making serious progress on the climate change problem in Canada over the next few years...?

Putting a price on carbon

SHOULD HOUSEHOLDS HELP PAY FOR CLIMATE CHANGE?

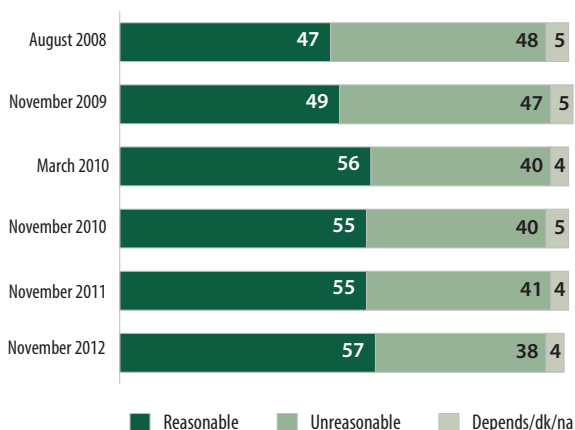
What is reasonable for households to pay for climate change actions? Substantive new strategies to reduce greenhouse gas emissions in this country will cost significantly, and ultimately these costs will fall to consumers, whether through taxes or higher prices on products and services.

Are Canadians prepared to help pay for solutions to climate change? No public consensus exists, but a clear majority (57%) think it is reasonable for an average household to pay an additional \$100 per year in higher taxes and prices to help address this problem, up marginally from 2010 and 2011.

This is the majority view in all provinces, but highest in B.C. (60%) and Saskatchewan (60%), as well as among Canadians aged 18 to 29 (68%), and those who support the Liberal (66%), New Democratic (66%) and Green (65%) parties. Even among Conservative supporters, \$100 per year for climate change is considered reasonable by a 50-percent to 45-percent margin.

Is it reasonable for consumers to pay \$100 per year for climate change?

August 2008 – November 2012



Q.46

Some experts have said that consumers should be prepared to pay more to help do their part to address climate change in Canada, in the form of new government taxes and higher prices for certain kinds of products and services? Do you think an additional \$100 per year is a reasonable amount for an average household to pay or do you think this amount is unreasonable?

B.C. CARBON TAX. In 2008, British Columbia became the first (and to date the only) jurisdiction in North America to implement a true carbon tax aimed at reducing consumer use of greenhouse gas emitting fossil fuels. When introduced, this tax proved controversial, but over time it has gained public and political acceptance.

Today, close to two-thirds of British Columbians say they strongly (25%) or somewhat (39%) support this tax as a way to fight climate change, a noticeable increase over the past 12 months and now the highest level of support recorded since the carbon tax was first announced in February 2008. Since June 2011, the proportion strongly opposed to the provincial carbon tax has dropped almost in half (from 32% to 17%).

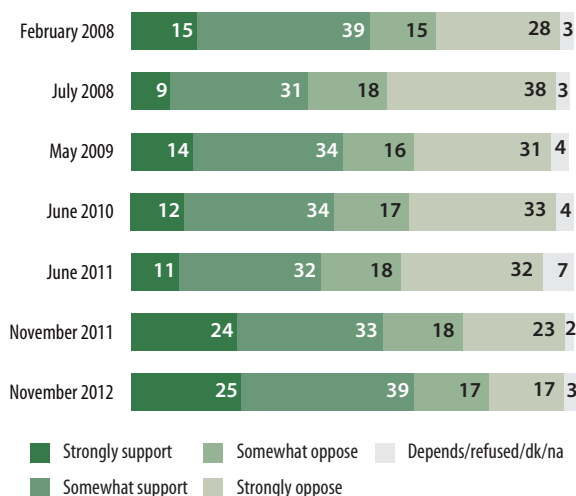
Elsewhere in Canada, politicians are quick to shut down any discussion about implementing such a carbon tax in their own jurisdiction and it is widely assumed that such a measure would be political suicide. Yet there is in fact considerable public support for just such a measure. Almost six in ten Canadians outside of B.C. say they would strongly (19%) or somewhat (40%) support a B.C.-style carbon tax in their own province, essentially unchanged from the viewpoint expressed one year ago.

The degree of support for a carbon tax varies noticeably across the country. Support is most widespread in Quebec (67%), followed by Manitoba (59%), Saskatchewan (58%), Ontario (58%) and Atlantic Canada (54%). In Alberta, only 43 percent voice support, compared with 53 percent who oppose such a tax.

Across the country, support is stronger among Canadians with higher levels of education, women, youth, and supporters of the NDP, Green Party and Bloc Québécois. Opposition is most evident among Canadians with the least education and Conservative Party supporters (by a 53-percent to 43-percent margin).

Support for carbon tax in B.C.

B.C. February 2008 – November 2012



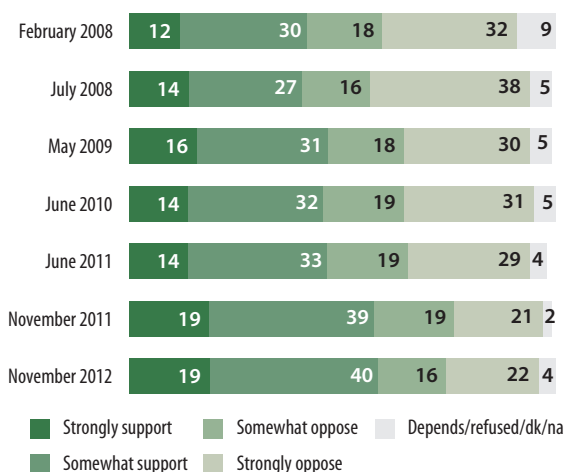
Q.47a

As you may know, British Columbia now has a tax on all carbon-based fuels used by consumers and businesses in the province, as a way to encourage reductions in greenhouse gas emissions generated in the province. This tax is now 7.2 cents per litre. This tax is "revenue neutral" which means the same amount raised through this tax each year is refunded – by law – to taxpayers in the form of lower personal income and corporate taxes. Do you strongly support, somewhat support, somewhat oppose or strongly oppose this carbon tax for B.C.?

Subsample: B.C. residents

Support for introducing B.C.-style carbon tax in own province

Rest of Canada February 2008 – November 2012



Q.47b

British Columbia now has a tax on all carbon-based fuels used by consumers and businesses in the province, as a way to encourage reductions in greenhouse gas emissions generated in the province. This tax is now 7.2 cents per litre. This tax is "revenue neutral" which means the same amount raised through this tax each year is refunded – by law – to taxpayers in the form of lower personal income and corporate taxes. Would you strongly support, somewhat support, somewhat oppose or strongly oppose this type of carbon tax for your province?

Subsample: All except B.C. residents

Immigration

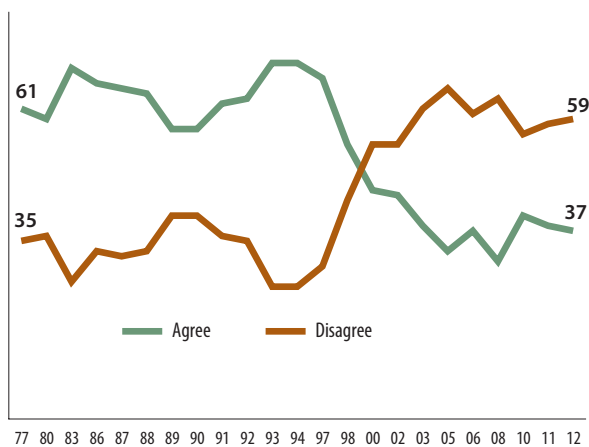
Canada has increasingly been defined (and has defined itself) as a nation of immigrants, and the country now accepts more than 250,000 newcomers each year. Canadians continue to be more positive than negative about immigration to this country. Opinions have held largely stable over the past year, but there have been notable shifts in some regions, and concern about newcomers fitting into Canadian society has inched upwards since 2011. The following “agree/disagree” statements serve as key indicators:

“Overall, there is too much immigration in Canada.” A majority (59%) of Canadians continue to disagree with this statement, compared with 37 percent who agree. These numbers are essentially unchanged since 2011, and generally reflect the balance of opinion over the past decade (and in sharp contrast to views in the 1980s and 1990s).

But this recent stability masks notable shifts across the country. Over the past year, concerns about the scope of immigration have increased in Atlantic Canada, the Prairies, and among rural residents and allophones, reversing a downward trend over the previous year. The opposite trend is evident in B.C. (also reversing a previous trend), and to a lesser extent Ontario, and residents of Canada’s largest cities.

Immigration levels too high

1977 – 2012



Q.35a

Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements...?

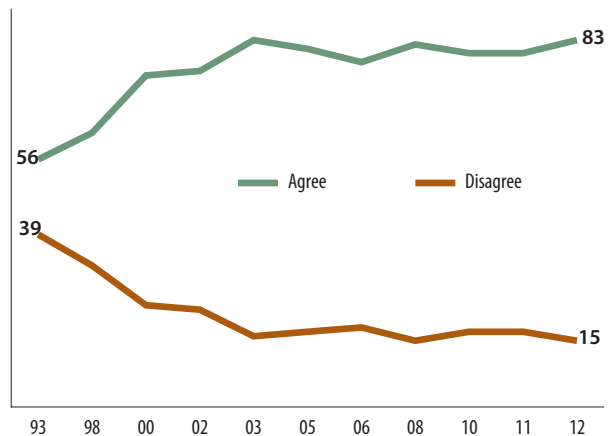
In 2012, the belief that immigration levels are too high is most widespread among Canadians without a high school diploma (59%, with 34% who strongly agree), allophones (50%) and federal Conservative supporters (47%), while this view is least apt to be shared by university graduates (23%), immigrants from the USA/Europe (23%), and supporters of the federal Liberals (27%) and NDP (28%).

“Overall, immigration has a positive impact on the economy of Canada.” More than eight in ten (83%) continue to agree with this statement, up three points since 2011 and matching the highest yet recorded (in 2003), compared with just 15 percent who disagree. This is a strong majority view across the country, and has increased over the past year in Ontario, Manitoba and Alberta, while declining only among rural residents (of whom 71% still agree that immigration is good for the economy).

Strong agreement with the positive economic impact of immigration is most widespread among university graduates, allophones and immigrants from the USA/Europe, while this view is least likely to be shared by Canadians from rural communities and those without a high school diploma (in each case, about one in four disagree with the majority opinion).

Economic impact of immigration is positive

1993 – 2012



Q.35g

Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements...?

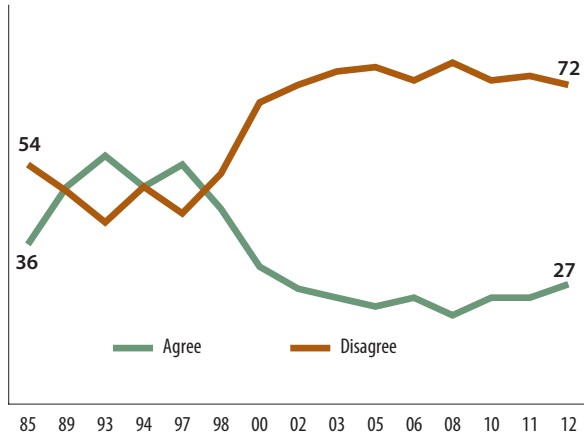
“Immigrants take away jobs from other Canadians.”

Consistent with the previous statement most (72%) Canadians continue to reject the idea that immigrants take jobs from other Canadians, although marginally less so than in 2011. This latest shift reflects increasing concerns about job impacts in Atlantic Canada, Saskatchewan and rural communities, and to a lesser extent in Alberta, Quebec and small towns.

Education continues to be the primary driver of opinions on this statement, and the gap in agreement with this statement between those with the least (53%) and most (12%) education has widened further over the past year.

Immigrants take away Canadian jobs

1985 – 2012



Q.35e
Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements...?

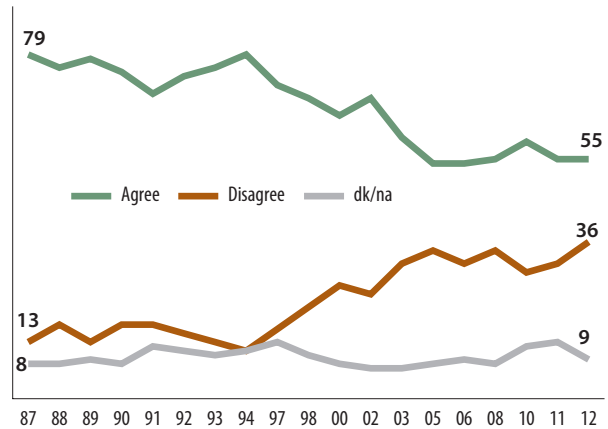
“Many people claiming to be refugees are not real refugees.”

A majority (55%) continue to agree with this statement (unchanged from 2011), but an increasing minority (36%, up 5 points) disagree, as fewer now have no opinion about the legitimacy of refugee claims. Over the past year, rejection of this statement is up mostly in B.C., as well as Ontario and Quebec, while the reverse trend is evident in Saskatchewan (where agreement is up 23 points).

Concern about the legitimacy of refugee claims is most widespread among residents of Ontario (especially Toronto, where 37% strongly agree with the statement) and Alberta, Canadians aged 60 plus, immigrants from outside the USA/ Europe, those with the least education and Conservative Party supporters. But this view is also expressed by at least four in ten Canadians from all provinces and demographic groups, and federal political party supporters.

Refugee claimants not legitimate

1987 – 2012



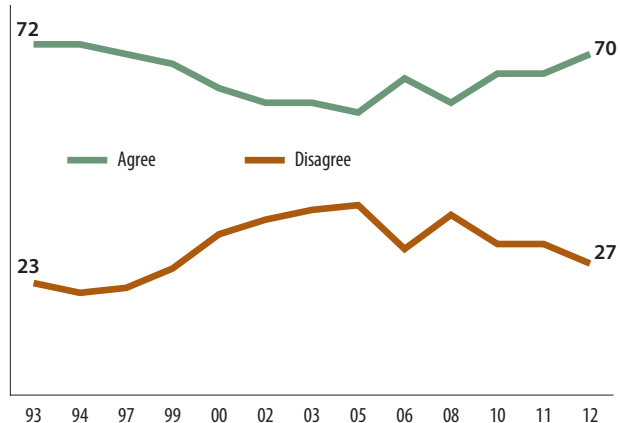
Q.35b
Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements...?

“There are too many immigrants coming into this country who are not adopting Canadian values.” Apart from the economic advantages of high levels of immigration, Canadians have been ambivalent about how newcomers are integrating into society, and concerns have increased over the past year.

Seven in ten (70%) now agree with this statement, up four points since 2011 and reaching its highest level since the 1990s. This upward trend has occurred everywhere except B.C. (where it is stable and down in Vancouver), but is most significant in Saskatchewan (up 20 points), and among immigrants from outside the USA/Europe (up 21).

Concerns about immigrants not adopting Canadian values continue to be most widespread among Quebecers (77%), rural Canadians (78%), those without a high school diploma (83%), and supporters of the Conservative Party (81%) and Bloc Québécois (80%), but this view is shared by at least six in ten across all groups within the population. As with other statements, strong agreement about immigrants not fitting in is most clearly delineated by education level.

Too many immigrants do not adopt Canadian values
1993 – 2012



Q.35f
Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with each of the following statements...?

Canada's Role in the World

Canada's leadership in world affairs

MOST IMPORTANT GLOBAL ISSUE. One year ago, Canadians were most likely to identify economic issues (e.g., recession, unemployment) as the most pressing issue facing the world. In 2012, this remains the number one mention, but no longer by the same margin as before (21%, down 11 points). This is balanced by increasing focus on war and conflict (18%, up 9) and environmental issues (15%, up 3), both increasing for the first time in several years.

A declining number identify starvation/world hunger or poverty (10%, down 7 points), with a smaller proportion specifically naming the unequal distribution of wealth (3%, unchanged). As in 2011, no other issue is identified by more than three percent of Canadians, including religious issues, social/moral decline, over-consumption of resources, food prices and terrorism. One in ten do not name any issue in response to this question.

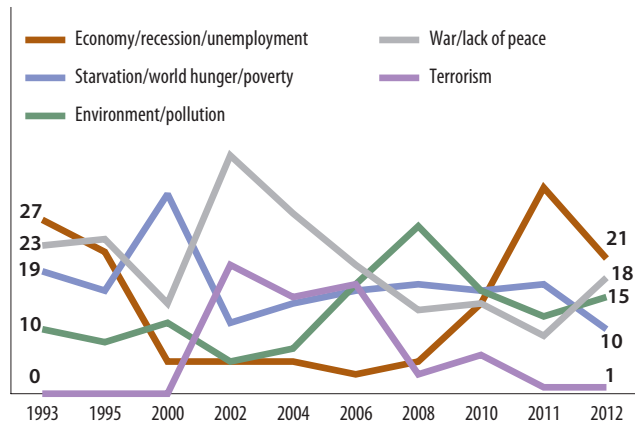
Declining focus on global economic issues is evident across the country, but most noticeably in Ontario and B.C., among men, and Canadians with higher levels of income and education. Concern about global environmental challenges has risen primarily among Quebecers, British Columbians and Green Party supporters (now at 37%, compared with 7% of Conservative supporters, who are among those most apt to focus on the world economy).

CANADA'S LEADERSHIP IN WORLD AFFAIRS. Most Canadians feel positive about their country's role in the world today, but this view has declined moderately over the past two years. Eight in ten now say they are very (30%) or somewhat (52%) satisfied with Canada's place in the world (down 5 points since 2010), compared with 17 percent who are now somewhat or very dissatisfied (up 5). This decline notwithstanding, the current level of satisfaction remains higher than that recorded in 2003.

This decline in satisfaction with the country's leadership has taken place across most of the country, excepting the three Prairie provinces, among small town and rural Canadians, and Conservative Party supporters. Strong satisfaction with

Most important global issue

Top mentions 1993 – 2012

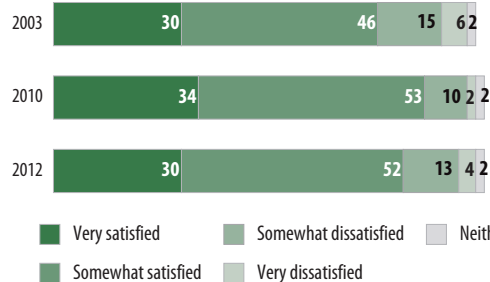


Q.48

What do you think is the most important issue or problem facing the world today?

Satisfaction with Canada's place in the world

2003 – 2012



Q.49

Are you very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with Canada's place in the world?

the country's leadership is most widespread in Alberta, among immigrants from outside the USA/Europe, more affluent Canadians and those with less education, while dissatisfaction is most evident among Quebecers and university graduates. Positive assessments are given by supporters of all federal political parties (and those who support none of them), but is strongest among Conservative supporters, and weakest among those who back the Green Party and Bloc Québécois.

What is the most positive contribution that Canada, as a country, makes to the world today? When asked (unprompted), the most common response continues to be peacekeeping (20%), up marginally from 2011 after declining significantly since 2004 (at 36%).

Other contributions include foreign aid (9%, down 4 points), multiculturalism/accepting immigrants (5%, down 3), our economic system (5%, down 1), natural resources (5%, up 1), being a voice of moderation/neutrality (5%, up 3), support for human rights and democracy (5%, up 1) and generally as an example to the world (5%, down 4). As in 2011, roughly one in four (27%) do not name any way in which they believe Canada makes a positive contribution to the world.

Opinions about Canada's contribution to the world are notably similar across the country. Quebecers continue to place comparatively greater emphasis on foreign aid (although marginally less so than in 2011).

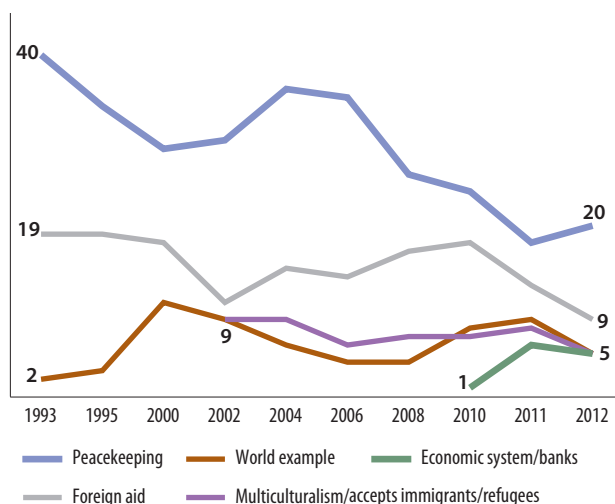
Canada – U.S. relations

OVERALL OPINION OF THE USA. Canadians' overall impression of their neighbour to the south has rebounded over the past year (due likely to Obama's recent re-election victory), although not back to the high point recorded in 2010. Close to seven in ten now have a very (11%) or somewhat (57%) favourable view of the United States, up six points since 2011. [Note: this survey was completed prior to the Newtown school shooting, which could have subsequently affected Canadian opinions of the U.S.]

This upward trend has taken place across the country, but most significantly in Quebec, Saskatchewan and Alberta, among Canadians under 45 years of age and immigrants from outside the USA/Europe. A majority from every group has a favourable view, but this is now lowest among British Columbians (58%), immigrants from the USA/Europe (56%) and Green Party supporters (55%).

Canada's most positive contribution to the world

Top mentions 1993 – 2012

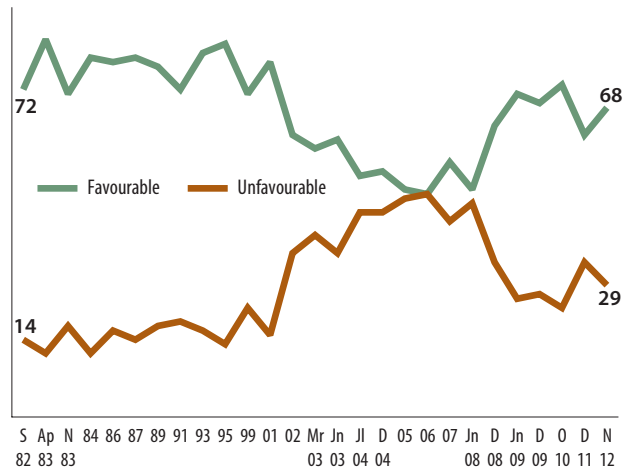


Q.50

In your opinion, what is the most positive contribution that Canada, as a country, makes to the world?

Overall opinion of the United States

1982 – 2012



Q.51

In general, what is your opinion of the United States? Is it very favourable, somewhat favourable, somewhat unfavourable or very unfavourable?

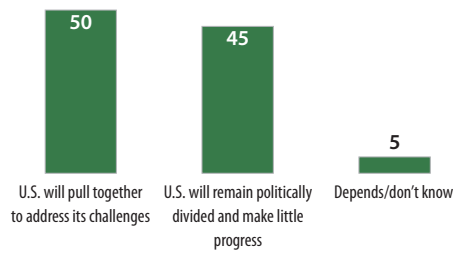
While most Canadians would appear to be happy to see Barack Obama re-elected for another four years, they are currently divided on how successful he will be in his second term. Half (50%) of Canadians think it will lead to the U.S. finally pulling together to more seriously address its economic and social challenges, while almost as many (45%) expect the U.S. to remain politically divided and make little progress to meet these challenges.

This division of opinion runs across the country, but Quebecers (61%) are the most optimistic about the USA getting its act together, while Manitobans (38%) are least likely to share this view.

USA VERSUS CHINA. The last decade has witnessed China ascending as a global superpower and economic engine to the world, while the influence of the USA appears to be waning. Despite these evident trends, Canadians continue to believe it is the USA (56%) rather than China (41%) that will be the more important country for Canada over the next 10 years, with this gap widening slightly since 2010.

The emphasis on the USA over China has strengthened across most of the population over the past two years, but most noticeably in Quebec and B.C., among Canadians aged 45 and older, immigrants and federal Liberal Party supporters. A shift toward seeing China as the more important country for Canada has taken place in Manitoba, and among NDP and Green Party supporters, but in no group do more than half share this perspective.

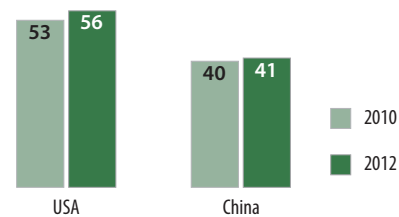
Most likely scenario for Obama's second presidential term 2012



Q.52

Now that Barack Obama has been re-elected as U.S. President for another four years, which of the following two scenarios do you think is most likely to happen...?

Which country will be more important to Canada 10 years from now? 2010 – 2012



Q.53

Which country do you think will be more important to Canada over the next 10 years...?

Social Capital

“Social capital” is the term used to describe the vibrancy of social networks, and the extent to which there is trust and reciprocity within a community and among individuals. It is the essential “lubricant” that makes it possible for societies to function and for people to get along peacefully even when they have little in common. There is ample evidence that high levels of such reciprocity, trust and connection are not simply “feel good” notions, but key ingredients to making communities productive, healthy and safe.

Social capital typically refers to two distinct concepts: i) a behavioural concept entailing the connections and networks through which individuals have ties to other people, groups and organizations (through memberships and activities); and ii) a subjective concept describing the degree of trust one has in others, and a felt sense of belonging. As well, there are two complementary dimensions of social capital, defined as “bonding” capital (connections within one’s own group) and “bridging” capital (connections with members of other groups), the latter being of particular importance in diverse multicultural societies.

The term “social capital” has been in use for more than a century, but gained widespread prominence in the 1990s

through the work of U.S. sociologist Robert Putnam. In his seminal book *Bowling Alone*, Putnam found evidence of a significant decline in social capital across American society, as expressed through diminishing participation in politics, service clubs and informal activities like bridge. In later work, Putnam found evidence from his research in the USA that increasing ethnic diversity is associated with declining (bridging) social capital, as individuals share less in common with people from other cultures, and so are less likely to trust them and support a multicultural society. In the past decade, Canadian researchers found that this trend, by and large, is not evident in this country.²

This one landmark Canadian study aside, there has been surprisingly little research on social capital in this country, a notable gap given the centrality of the concept and the implications for many areas of society. With this in mind, Focus Canada in 2012 takes the first steps in directly exploring the strength of social capital across the country, through measurement of a few key indicators of the trust aspect of social capital, including a couple drawn from the previous Canadian study.³

² Keith Banting, Will Kymlicka, Richard Johnston and Stuart Soroka. 2011. “Are Diversity and Solidarity Incompatible?” *Inroads: The Canadian Journal of Opinion* 28: 36-48.

³ Richard Johnston & Jonathan R. Kesselman, 2002. Equality, Security and Community Survey. Funded by the Social Sciences and Humanities Research Council (SSHRC), grant #412-97-0003.

SENSE OF BELONGING TO LOCAL COMMUNITY.

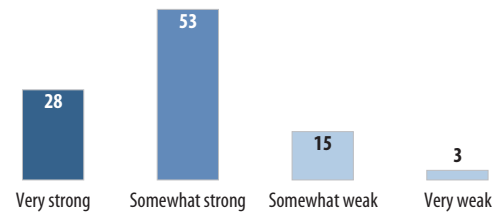
One indicator of social capital is an individual's sense of belonging to a greater whole, such as one's local community. Canadians are most likely to describe their own sense of belonging to be "somewhat strong" (53%), compared with those who say "very strong" (28%) on the one hand, and "somewhat weak" (15%) or "very weak" (3%) strong on the other.⁴

A sense of community belonging varies somewhat by province, community size and age cohort. As might be expected, a strong sense of belonging is most evident among Canadians aged 60 plus (38%) and those living in rural communities (40%). Across the country, this strength of connection is also more apt to be felt in Saskatchewan (32%), Ontario (32%), Manitoba (31%) and B.C. (31%), and less so in Quebec (21%) and Alberta (23%) (where more than one in five describe their connection as weak).

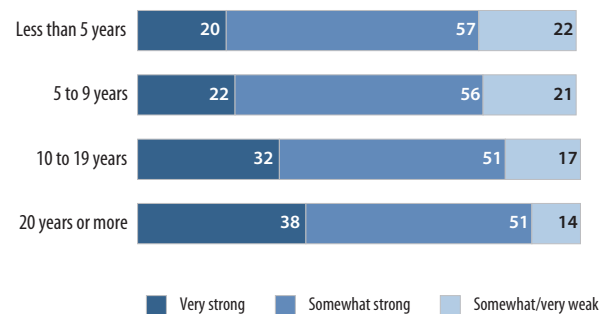
Notably, there is relatively little difference across income and education strata, although Canadians in the lowest income bracket express somewhat weaker attachment. Allophones and immigrants from outside the USA and Europe are as likely as other Canadians to say they feel a strong sense of belonging to their local community, but at the same time are also somewhat more likely to make up the group that expresses a weak attachment.

Consistent with other research, a sense of belonging is also a function of how long one has been living in the same neighbourhood. Very strong local ties are reported by 20 percent of Canadians who have lived at the same address for less than five years, almost doubling to 38 percent among those with tenure of at least 20 years (and this relationship holds across age cohorts, although more weakly among Canadians under 30).

Sense of belonging to local community
2012



Sense of belonging to local community
By years at same address 2012



Q.18

How would you describe your sense of belonging to your local community?
Would you say it is...?

⁴ This question is taken from the Canadian Community Health Survey (CCHS) conducted every couple of years by Statistics Canada. A direct comparison of these results with those from CCHS surveys has not been done due to methodological differences (e.g., sample composition, placement of questions).

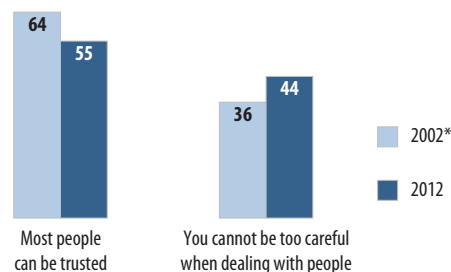
TRUST IN OTHERS. Also central to the concept of social capital is the degree to which individuals have a level of trust in others in the society in which they live. In 2012, Canadians' sense of trust in others is somewhat divided, based on a question drawn from the previous national study. A small majority (55%) say that, generally speaking, most people can be trusted, compared with 44 percent who maintain that you cannot be too careful in dealing with people. This reflects a noticeable decline over the past decade when the balance was more positive (64% most people can be trusted, versus 36% cannot be too careful).

This declining trust in others is evident across most of the country, with the notable exception of British Columbia, and is most significant in Atlantic Canada, Saskatchewan and Alberta. Trust levels are now highest in B.C. (66%, although lower in Vancouver at 60%) and lowest in Quebec (43%).

As in 2002, trust in others varies most dramatically by socio-economic status, especially education level where the gap has widened over the past 10 years; trust in others is expressed by 68 percent of Canadians with a university degree, but only 29 percent of those without a high school diploma. By comparison, trust levels between the young and old have narrowed, and no longer differ significantly (as trust has decreased by a greater proportion among Canadians 45 and older).

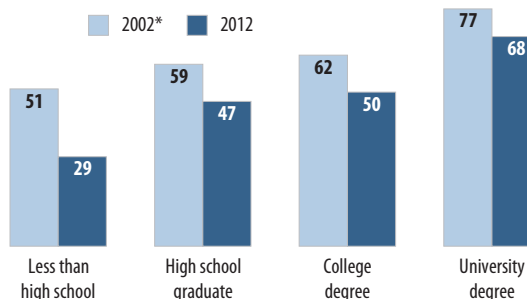
Notably, country of birth does not appear to be a significant factor in Canadians' sense of trust in others. Immigrants are as likely as native-born to express such trust, with those born in the USA/Europe even more so (70%). Not surprisingly, trust in others is strongly associated with a general sense of belonging to one's local community, and this holds regardless of age.

Trust in others 2002 – 2012



*Johnston, et al., 2002

Most people can be trusted By education 2002 – 2012



*Johnston, et al., 2002

Q.19

Generally speaking, would you say that most people can be trusted or that you cannot be too careful in dealing with people?

RECOVERING A LOST WALLET. One of the most well-known indicators of social capital measures people's confidence in having a lost wallet or purse containing \$200 returned by each of several types of individuals (someone who lives close by, clerk in a nearby store, police officer, stranger).

Predictably, Canadians' confidence in recovering a lost wallet with money inside varies significantly depending on who might find it. But in contrast to the general trust question presented above, such confidence has held notably steady over the past 10 years.

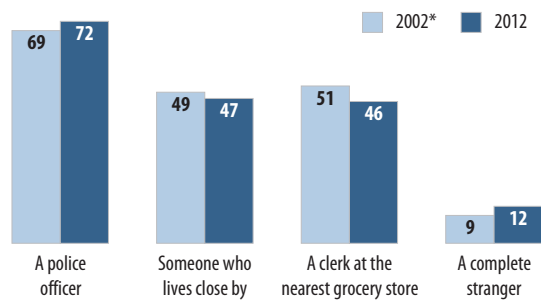
If found by a police officer. Among the four scenarios, Canadians are, by far, most likely to expect they would recover a lost wallet if found by a police officer. Seven in ten (72%) say this would be very likely, up marginally from 2002. The remainder say this would be somewhat likely (23%) or not at all likely (5%).

Strong confidence in this case is lowest in Quebec, but it is this province that has seen the largest increase since 2002 (to 54%, up 12 points). Those most likely to believe a police officer would return their wallet include residents of Manitoba, higher income Canadians, anglophones and those who feel strong connection to their community. Across age cohorts, confidence has increased most noticeably among Canadians aged 18 to 29 (to 71%, up 9).

If found by someone who lives close by. As in 2002, just under half (47%) of Canadians think it would be very likely to have a lost wallet returned by someone who lives close by, with 41 percent saying this is somewhat likely, and another 12 percent not at all likely.

Confidence in the good deeds of people living nearby is highest in Atlantic Canada (56%) and Saskatchewan (54%), but in both cases is less widespread than 10 years ago. This opinion is also most evident among rural residents, older Canadians and anglophones, and least evident among Quebecers (31%), those living in major urban centres (especially Montreal) and those under 30 (although the gap between young and old has narrowed over the past decade). As might be expected, sense of community belonging is a strong predictor of confidence in recovering a lost wallet from a neighbour.

Very likely to recover a lost wallet found by ...
2002 – 2012



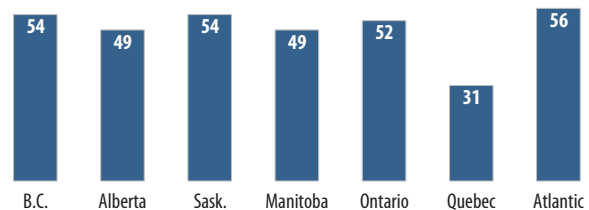
*Johnston, et al., 2002

Q.20a-d

If you lost a wallet or purse that contained \$200, how likely is it to be returned with the money in it if it was found...? Would it be very likely, somewhat likely or not at all likely?

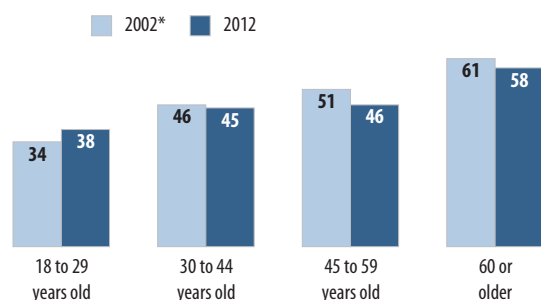
Very likely to recover a lost wallet found by someone who lives close by

By province 2012



Very likely to recover a lost wallet found by someone who lives close by

By age 2002 – 2012



*Johnston, et al., 2002

Q.20a

If you lost a wallet or purse that contained \$200, how likely is it to be returned with the money in it if it was found if it was found by someone who lives close by? Would it be very likely, somewhat likely or not at all likely?

If found by a clerk in the nearest grocery store. Canadians express a comparable level of trust in recovering a lost wallet found by a clerk in the nearest grocery store, although somewhat less so than in 2002. Fewer than half (46%) say this would be very likely (down 5 points), compared with 43 percent who say somewhat likely and 11 percent who do not think this would happen.

Declining confidence in recovering a wallet from a store clerk is most noticeable in Atlantic Canada and Saskatchewan, among men, higher income Canadians and those without a high school diploma, while rising among those under 30. As with other scenarios, confidence remains strongest in Atlantic Canada (57% very likely), the Prairies (57%) and among rural residents (61%), and weakest in Quebec (30%).

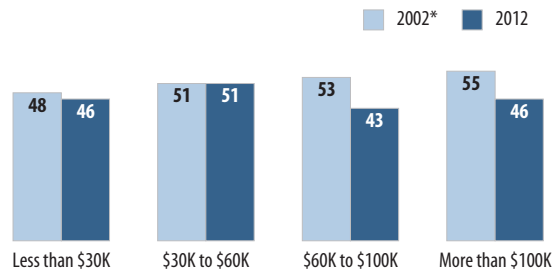
If found by a complete stranger. Predictably, Canadians are least likely to expect a lost wallet to be returned by a complete stranger, although they are a bit more optimistic than a decade ago. Just over one in ten (12%) think this is very likely (up 3 points), compared with a majority (55%, up 2) who believe it is somewhat likely and one-third (32%, down 4) who say not at all likely.

Opinions about the honesty of strangers is largely consistent across the country, although Atlantic Canadians (20%) continue to stand out as being the most trusting, and Quebecers (5%) the least so. Expectations are very similar across socio-economic status, and older Canadians are only marginally more optimistic than younger ones. Once again, trust in recovering a lost wallet in this scenario increases along with strength of belonging to one's local community.

More surprising are the results by community size: strong confidence in recovering a lost wallet from a stranger is the same regardless of community size, but it is rural residents who are most likely to expect they would never see this wallet again.

Very likely to recover a lost wallet found by a clerk in the nearest grocery store

By household income 2002 – 2012



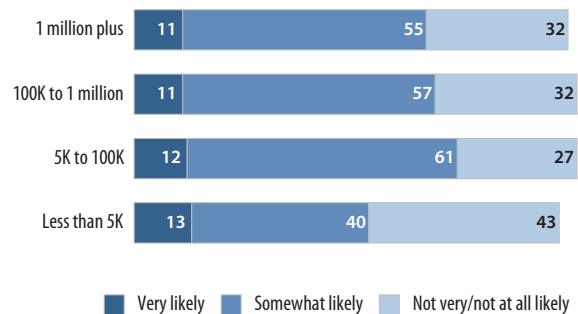
*Johnston, et al., 2002

Q.20b

If you lost a wallet or purse that contained \$200, how likely is it to be returned with the money in it if it was found by a clerk in the nearest grocery store? Would it be very likely, somewhat likely or not at all likely?

Very likely to recover a lost wallet found by a complete stranger

By community size 2012



Q.20d

If you lost a wallet or purse that contained \$200, how likely is it to be returned with the money in it if it was found by a complete stranger? Would it be very likely, somewhat likely or not at all likely?

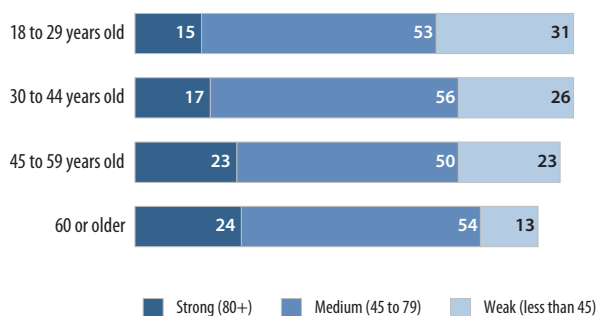
SOCIAL CAPITAL INDEX. The social capital indicators presented above were also combined into a single index that captures the variance into a single measure (with a range from “0” to “100”). Across the Canadian population, the mean social capital scores fall within a relatively narrow range, with most groups between 55 and 65 (out of 100). Differences are more apparent when the focus is placed on the top and bottom quintiles.

Strong social capital scores (80 and over) are most evident in Toronto (26%) and rural communities (28%), among high-income Canadians (25%) and those aged 60 plus (24%), and least so in Quebec (10%, compared with 38% in the lowest group which includes index scores under 45), among Canadians under 30 (15%), and those with the lowest levels of income (15%) and education (14%).

Finally, the impact of housing tenure on social capital appears to operate differently for younger and older cohorts. Among Canadians under 45, more years at the same address reduces the likelihood of having weak social capital, but does not improve the chances of having strong social capital. For those aged 45 and older, social capital increases in a linear fashion along with years at the same address.

Social capital index*

By age 2012



* Index measured on a scale from “0” (weak) to “100” (strong)



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