



Focus Canada 2010

Public opinion research on the record
Serving the public interest



ENVIRONICS
• INSTITUTE •

The Environics Institute

The Environics Institute for Survey Research was established by Environics Research co-founder Michael Adams in 2006 to sponsor relevant and original public opinion, attitude and social values research related to issues of public policy and social change. The Institute's mandate is to survey individuals and groups not usually heard from, using questions not usually asked. The Institute designs its questionnaires and research processes with a view to demonstrating deep respect for those it surveys. In analyzing its research findings, it strives to listen carefully to what respondents are really saying.

Integral to the Institute's mission is the broad dissemination of its research into the public domain, to stimulate constructive discourse and support the development of informed responses to policy and social challenges.

The Institute achieves its objectives by:

- (1) Sponsoring survey research on issues of public import which are being ignored or insufficiently addressed by other sponsoring organizations (e.g., media, foundations, governments, corporations, academic bodies) in Canada and abroad;
- (2) Partnering with media organizations to responsibly disseminate Institute-sponsored research;
- (3) Encouraging informed public discourse on issues related to Institute-sponsored research;
- (4) Funding programs that extend access to the Environics' data archive to academics, think tanks, foundations, students and journalists; and
- (5) Funding research on the conduct and public dissemination of public opinion research in Canada.

In all of its projects, the Institute seeks to partner with other organizations that share its broad objectives and want to play a substantive role in the research (as advisors, funders or media partners).

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Introduction

Background

Public opinion matters – in all countries, but especially in democracies like ours. 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 in this country to help answer this question. The tools of social science that have been developed and refined over the 20th century to inform consumer marketing have proven effective in understanding citizen opinion on important issues, as well as 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 U.S., 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. This is complemented by regular polling programs by other organizations (Gallup, Kaiser Family), and high quality polling programs conducted by the country's leading media such as the *New York Times* and ABC News. In Europe, the EuroBarometer has been providing an ongoing picture of citizen views across the European Union since 1973. In Central and South America, the AmericasBarometer and the LatinoBarometer have been conducting regular multi-country public opinion surveys for several decades.

In Canada, thoughtful and sustained public interest research has had less of a presence. Over the past several decades, such research has been conducted through media-sponsored polls and the occasional foundation-sponsored study, and most commonly by commercial research companies conducting "syndicated" studies on behalf of paying subscribers, with little or no public release. Governments at the federal and provincial levels have been the major sponsors of syndicated public affairs research, but this type of investment has declined significantly over the past few 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 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. The

quality of public opinion research in this country – in sharp contrast with other advanced (and even some emerging) democracies – is regressing.

The New Focus Canada

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 new 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.

The **Environics Institute for Survey Research** is a non-profit entity established in 2006 to sponsor relevant and original public opinion and social values research related to issues of public policy and social change. The Institute's goal is to survey those not usually heard from, using questions not usually asked. For a list of Institute projects and further information, see www.environicsinstitute.ca.

The Institute established the following Advisory Group of recognized experts in public opinion and public policy, to provide input and counsel on the design and interpretation of the Focus Canada research:

- Keith Banting, Queen's Research Chair, School of Policy Studies, Queen's University
- Mel Cappe, President, Institute for Research in Public Policy (IRPP)
- Jennifer McGuire, Editor-in-chief and General Manager, CBC News (pending confirmation of sponsorship)
- André Pratte, Editor in Chief, La Presse

- John Richards, Professor, Public Policy Program, Simon Fraser University
- Stuart Soroka, Assoc. Professor, McGill University; Director of the Canadian Opinion Research Archive
- Jennifer Welsh, Professor of International Relations, University of Oxford
- David Zussman, Jarislowsky Chair in Public Sector Management, University of Ottawa

2010 National Survey

The first major project under this initiative is a national public opinion survey to take the pulse of Canadians on a wide range of relevant policy areas and issues facing the country at this time. The overall framework for the research is Canadians' political values, including social issues (e.g., crime and justice, health care, multiculturalism), economic issues (taxation), confidence in institutions, the role of government and Canada's place in the world. In addition to the Institute, this research is being sponsored by the Canadian Opinion Research Archive (CORA) and the Canadian Broadcasting Corporation (CBC), which is also serving as the project's media partner.

The research was conducted by Environics Research and consists of a comprehensive national public opinion survey conducted by telephone with a representative sample of 2,020 Canadians (aged 18 and over) between September 27 and October 12, 2010. 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 2.2 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 international benchmark data are provided through the Pew Research Center Global Attitudes Project (Environics conducts the Canadian portion of this research study). Further details on the survey results are available through the Environics Institute (contact Dr. Keith Neuman at keith.neuman@environics.ca).

Executive Summary

The world at the end of the first decade of the 21st century has become an anxious and unpredictable place, still reeling from the recent global financial meltdown, unable to stop growing poverty and income disparities, struggling with geopolitical tensions, piracy on the high seas, increasing religious tensions and witnessing an apparent spike in catastrophic natural disasters on every continent. Canada has been fortunate to avoid much of this turmoil, and this fact helps to explain how Canadians feel about their country, institutions and prospects for the future.

What emerges from this comprehensive research is a people who on the whole feel good about their country. The Canadian mood stands in sharp contrast to the American outlook, which is arguably the gloomiest it has been in generations.

Canadians feel as proud as they ever have of their country, and confident in their core institutions (if less so in the people running them). They have maintained their faith in the country's social welfare foundations, including support for the public health care system and a strong role for government in addressing pressing issues like the environment and poverty, although at the same time less tolerant of the inefficiencies that may result. The public remains comfortable with the growing diversity of the population (now among the most multicultural in the world) and acknowledges the presence of the country's Aboriginal peoples. Canadians have never felt safer in their communities, and believe that prevention rather than enforcement is the best route to keeping crime rates low. Public support for the death penalty remains at an all-time low.

In sharp contrast to the oft-stated anti-American bias, the people of Canada are judging the U.S.A. according to its actions and leadership, and ready to admire (and even follow) when they believe their southern neighbour is heading in the right direction. Looking to the international scene, Canadians are broadening their view of how their country can constructively engage with the world, which still includes a prominent role for being peacekeepers in areas of conflict.

In looking at the data over the past several decades, what is most notable is the striking stability of public opinion on most issues. There is a notable absence of dramatic shifts that one might see in places or in eras of social and political upheaval. By comparison, Canada seems to be a boring place, and Canadians seem to like it that way.

At the same time, also apparent is an evolution in social values as Gen X and Gen Y cohorts gradually replace their pre-Boomer grandparents in the population. Over the past decade or so, Canadians have become more progressive in their attitudes about such issues as abortion, gun control and same-sex marriage. And most do not believe economic uncertainties are any excuse to slow down efforts to tackle environmental challenges like climate change.

Apart from generational change, other factors influencing the evolution of public opinion include the generally robust economy, an increasingly educated population, and a media environment in which communication and self-expression have exploded. This raises the question of whether Canadians have confidence in their leaders and their current approach to governance in a wired, egalitarian, globalized urban world. This research reveals Canadians are proud of their country – especially its democracy – and tend to think it is on the right track. Perhaps for this reason there is little public pressure for the kind of social media-driven revolution now brewing in some other countries. The public's dissatisfaction with its leaders across the political spectrum suggests that they simply want them to exhibit some of the wisdom, dignity and idealism that our institutions seem to point them toward.

The following are key highlights from the research:

Economy and standard of living

- Canadians are more positive than negative about the direction of their country today, and this stands out in comparison to views in most other countries. Half (52%) of Canadians are positive, second only to the Chinese (87%), and well ahead of British (31%), Americans (30%), French (26%) and a number of other societies.

- The public's confidence in the national economy has improved noticeably from the recent global recession of 2008-09, but Canadians have yet to become optimistic about current economic conditions and most do not feel it is a good time to return to pre-recessionary levels of personal spending.
- At the same time, the recent recession does not appear to have had a lasting impact on how Canadians view their standard of living. Most are at least somewhat satisfied with their current standard of living, and a strong plurality say they have made progress over the past decade. Nine in ten believe they enjoy a better quality of life than do residents of the United States.
- Canadians are more likely than not to believe that the current tax system is unfair to the average taxpayer, although this view is less widespread than it was through the 1980s and 1990s. As well, a strong majority continue to believe that taxes are fundamentally a good thing because they help support the high quality of life enjoyed in this country.
- Two-thirds of Canadians believe the disparities in income between rich and poor in this country are growing, although this proportion is smaller than in 2008 and for most of the previous two decades. Eight in ten believe government has a responsibility to reduce such disparities, but the strength of this opinion has also declined in the past two years.

Canadian identity and symbols

- Canadians' pride in their country today is as strong as it has been since the 1980s. Three-quarters say they are very proud to be Canadian, and even in Quebec a comparable proportion are at least somewhat proud. This pride is based on a number of attributes, the top being that Canada is a free and democratic country, but also because of its quality of life, caring people and multiculturalism.
- Most Canadians outside Quebec identify personally more with the country than with their home province, and this proportion is up noticeably from a decade ago. In Quebec, just over one-third identify more strongly with Canada, with this proportion largely stable since 2000. Among immigrants, eight in ten identify more with their adopted country than their country of origin.
- Canadians continue to place strong importance on a number of established symbols of national identity, and in all but one case these attachments have strengthened since 2007. At the top of the list are the country's health care system, the Charter of Rights and Freedoms, the Canadian flag and National Parks; all seen as very important by at least seven in ten. By comparison, only one in six place similar importance on the Queen as a symbol of national identity, unchanged since 1997.

National unity and governance

- Canadians' confidence in a number of major governing institutions remains strong; the military, Supreme Court and justice system inspire particular confidence. In sharp contrast, since 2007 public confidence has declined significantly in the case of Parliament and political parties, and this trend is evident across the country.
- This trend notwithstanding, Canadians also now express a record high degree of confidence in the country's underlying system of government, continuing an upward trend stretching back to 1991. This trend may well explain the stagnant levels of public support for changing the current political system to one based on proportional representation (favoured by a small but stable majority).
- Canadians' views about the relative spending priorities of the federal government have remained largely stable over the past decade, with some areas seen as having higher priority (e.g., reducing child poverty, education, health care) and others having lower priority (national defence, justice system, foreign aid). Since 2008, however, the priority on spending more has declined across most areas, suggesting a reduced appetite or expectation for growing government expenditures in response to the recession and/or the government's recent stimulus spending.
- Public support for bilingualism is now at an all time high, as it applies to both the country as a whole and Canadians' own province. Support for bilingualism in Canadians' own provinces remains highest in eastern Canada (notably Quebec) and lowest in the west, but has increased since 2003 in every province except Manitoba. This trend notwithstanding, Canadians are placing less importance than ever before on actually learning the other official language; one might say they are merely paying lip service to language-learning.

- Public sentiments do not reveal any rising threat to national unity. Quebecers are expressing less satisfaction with the status quo than in recent years, but desire for independence or sovereignty remains well below levels needed to make any referendum plausible. Western Canadians' sense of alienation with their place in Confederation is at an all time low, but is now more evident in B.C. than in the Prairie provinces.

Health care

- Canadians are more likely than not to believe the country's health care system is in a state of crisis, but this view has been diminishing since 2002 and is now at an all-time low. Over the same time period, the public has increasingly come to believe that the main source of problems is inefficient management rather than a lack of adequate funding.
- Despite concerns about the health care system overall, Canadians maintain a strikingly confident view about the capacity of the system to provide quality health care when it's needed, and care for those who are most vulnerable. Three-quarters continue to believe Canada's health care is among the best in the world.
- Along with this confidence comes strong public support for maintaining the current publicly-funded, single tier health care system. At the same time, a small but increasing majority of Canadians also favour allowing individuals to purchase private health care services to ensure timely access that may not be possible through the public system.

Environment

- The environment has been and remains a major source of public concern, which has persisted through the recent economic downturn. At the same time, Canadians continue to be markedly positive about the environmental quality where they live, as they have been since the mid-1980s.
- Canadians remain divided on whom they view as the greatest threat to the environment in this country, between industry (which manufactures products that pollute) and consumers (who buy, use and throw out the products that industry produces). Only one in ten feel strongly that both industry and consumers are equally responsible for environmental problems.

- As well, there is no public consensus on the most effective approach for ensuring that Canadian industries reduce their impact on the environment. A plurality (43%) advocate a regulatory approach involving strict laws and heavy fines, while others believe in economic levers such as tax breaks (33%) or public reporting to embarrass companies into cleaning up (18%). Views on this issue have changed little over the past five years.

Immigration and multiculturalism

- Canadians continue to hold largely positive views about the high level of immigration to this country, although opinions have moderated somewhat since 2008, possibly a result of the recent recession. Clear (although reduced) majorities disagree with the view that current immigration levels are too high and that immigrants take away jobs from other Canadians. Eight in ten continue to agree that immigration has a positive impact on the economy overall.
- Over the past several years, the public has grown somewhat more concerned about the legitimacy of refugee claims, but at the same time have gained greater confidence in the country's ability to keep criminals out of the system. As well, the past 25 years have seen growing sympathy for accepting political refugees who would not otherwise qualify for immigration.
- Despite generally positive attitudes toward immigration, Canadians remain concerned about how newcomers integrate culturally into the country. A growing majority agree too many immigrants do not adopt Canadian values, and believe ethnic groups should blend into mainstream society. At the same time, there is increasing acceptance of the notion that ethnic and racial groups need support from others in order to succeed in this country.
- Canadians remain uncertain about Muslims living in this country. A majority continue to believe they want to remain distinct rather than adopt mainstream Canadian customs, although this view has declined marginally since 2006. And a growing proportion now endorse a ban on Muslim head scarves in public, with this sentiment most prevalent in Quebec.

Aboriginal peoples

- A majority of Canadians feel they are somewhat, if not very, familiar with Aboriginal issues in the country today. This feeling of awareness is higher than in 2007 (likely due to the federal government's apology about residential schools), but remains below the record-high level recorded in 2005.
- Reflecting on who bears responsibility for the problems experienced by the country's Aboriginal peoples, Canadians are almost twice as likely to point the finger at government policies and the attitudes of non-Aboriginals as they are to blame Aboriginal peoples themselves. But this perspective remains unchanged since 2005, and is even less evident that it was 20 years ago. As well, one-third believe Canada has treated its Aboriginal population better than other countries have treated their own Indigenous groups, compared with one in ten who say Canada's record has been worse.
- In terms of addressing current issues facing Aboriginal peoples in Canada today, the public places the greatest priority on improving living and social conditions on reserves, followed by promoting economic development and improving social conditions in urban areas. By comparison, less priority is given to settling land claims and moving toward self-government.

Crime, justice and social issues

- Government and police statistics document declining crime rates, and public opinion reveals the same trend. Half of Canadians now believe crime rates are increasing, the lowest proportion recorded since the early 1990s. Strong majorities continue to feel safe in their own neighbourhood, consistent with opinions expressed as far back as the mid-1970s.
- In terms of how governments are expected to protect their citizens, Canadians continue to place greater faith in prevention strategies (e.g., education) than in law enforcement (detecting crime and punishing lawbreakers), with the former perspective strengthening modestly since 2008. A clear majority support current federal gun regulations (including the national registry), with the level of strong support up noticeably since 2005.
- A small majority (53%) of Canadians continue to support capital punishment for certain crimes, but this proportion remains at an all-time low. Such support is most evident

in Saskatchewan and among rural Canadians, while least evident in Quebec.

- Public support for same-sex marriage is at an all-time high, with seven in ten Canadians now supporting the current law of the land. Strong support outweighs strong opposition by a two-to-one margin. Rising support since 2006 is evident across most regions and demographic strata.
- Also growing is public support for a woman's right to have an abortion. Three-quarters of Canadians now support this choice, reflecting a steady rise dating back to the early 1990s, when only a small majority expressed this view. Growing support for abortion rights is evident across most of the population.

Canada's role in the world

- Canadians feel generally positive about their country's role in the world today, and this view has strengthened over the past few years. The public is most likely to consider peacekeeping as their country's top international contribution, although this view is less prevalent than before. An increasing proportion consider foreign aid to be an important contribution, although there is also declining support for increasing spending in this area.
- The 2008 election of Barack Obama as U.S. president proved to be a turning point in Canadians' views on the U.S.A.: three-quarters now say their overall opinion is positive, almost back to the levels recorded during the Clinton presidency. Those still holding a negative opinion are most likely to say this is because of what they see as an American attitude of arrogance or superiority, U.S. foreign policy (e.g., wars in Iraq and Afghanistan) and unfair trade policies.
- Canadians are more likely than not to feel their government's policy in the Middle East is balanced, although a slightly increased minority believes the approach is too pro-Israel (compared with very few who say it overly favours the Palestinians). A solid (although declining) majority continue to believe that Canada can play a constructive role in promoting peace in the Middle East.
- Canadians' overall view of China is somewhat mixed, with half (48%) saying they have a favourable opinion of this country, reflecting a gradual downward trend since 2005. At the same time, four in ten now say they believe China will be more important to Canada than the U.S.A. will be 10 years from now.

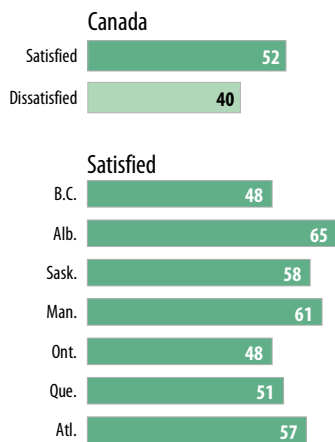
The Economy and Standard of Living

DIRECTION OF THE COUNTRY. Canadians are more positive than negative about the way things are going in the country today, and this perspective stands out in relation to citizens' views in most other countries. Half (52%) of Canadians are satisfied overall with the way things are going in the country, compared with 40 percent who are dissatisfied.

Satisfaction is most widely expressed in Alberta (65%) and Manitoba (61%), as well as among men, younger Canadians and those with the highest incomes. Satisfaction is least evident in Ontario (48%) and B.C. (48%).

Satisfied with direction of country

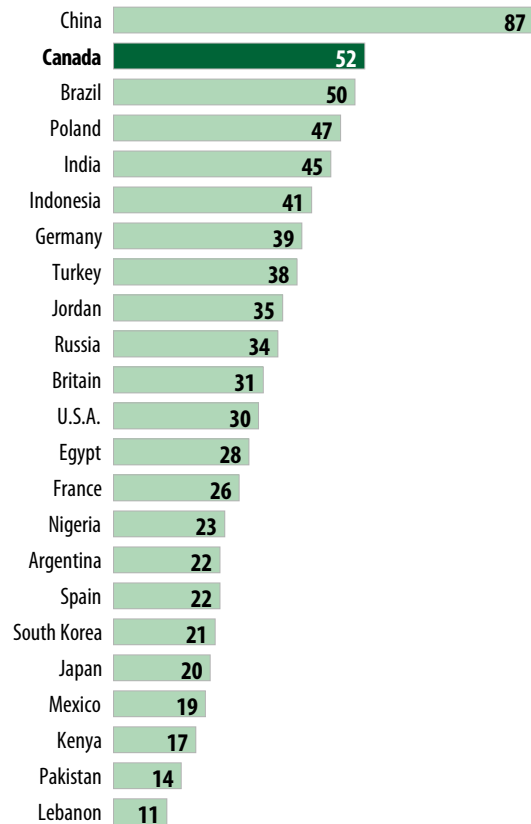
Canada By province



Internationally – through comparisons with a recent survey by the U.S.-based Pew Research Center in April 2010 – Canadians are second among 23 countries to only the Chinese (87% satisfied) in feeling positive about the direction of their country today, ahead of Brazil (50%) and Poland (47%). By comparison, satisfaction levels are significantly lower in the U.K. (31%), U.S.A. (30%) and France (26%). Satisfaction levels in Canada have risen gradually since 2005 (45%, placing 6th internationally), although lower than in 2003 (60%).

Satisfied with direction of country

International

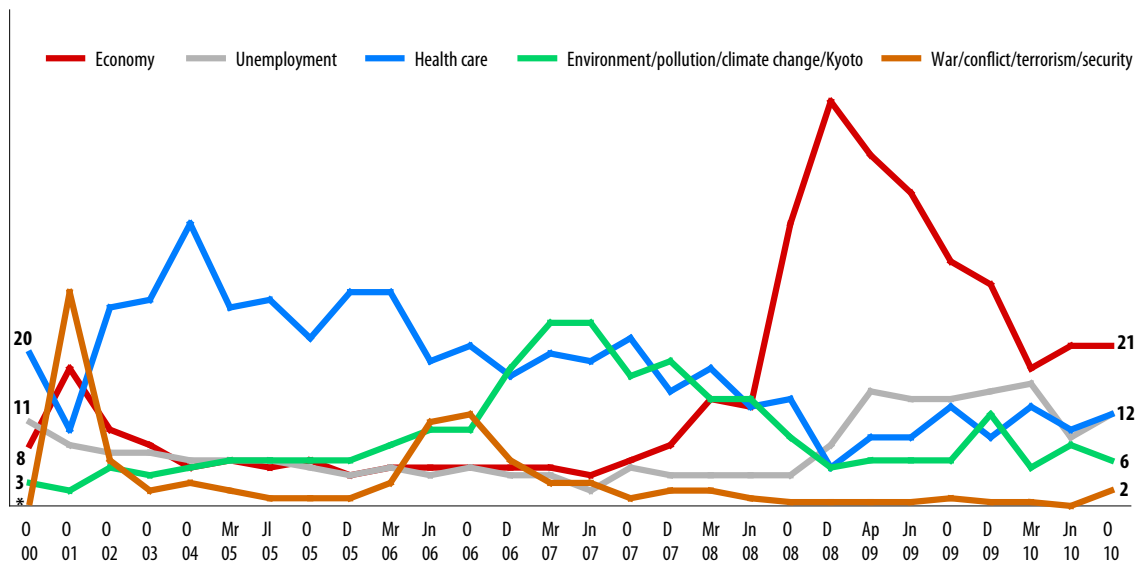


Note: International data from Pew Research Center

MOST IMPORTANT ISSUE. Canadians continue to identify the economy and jobs as the most important issue facing the country today, top-of-mind (35%), although well below the level recorded two years ago following the global financial meltdown. Other issues – following well behind – are health care (12%), environmental issues (6%), poor government leadership (5%) and taxes (4%).

The economy is the most salient issue across the country, but most noticeably in Ontario. Health care is most prominent in Quebec and Atlantic Canada.

Most important problem facing Canadians today
2000 - 2010



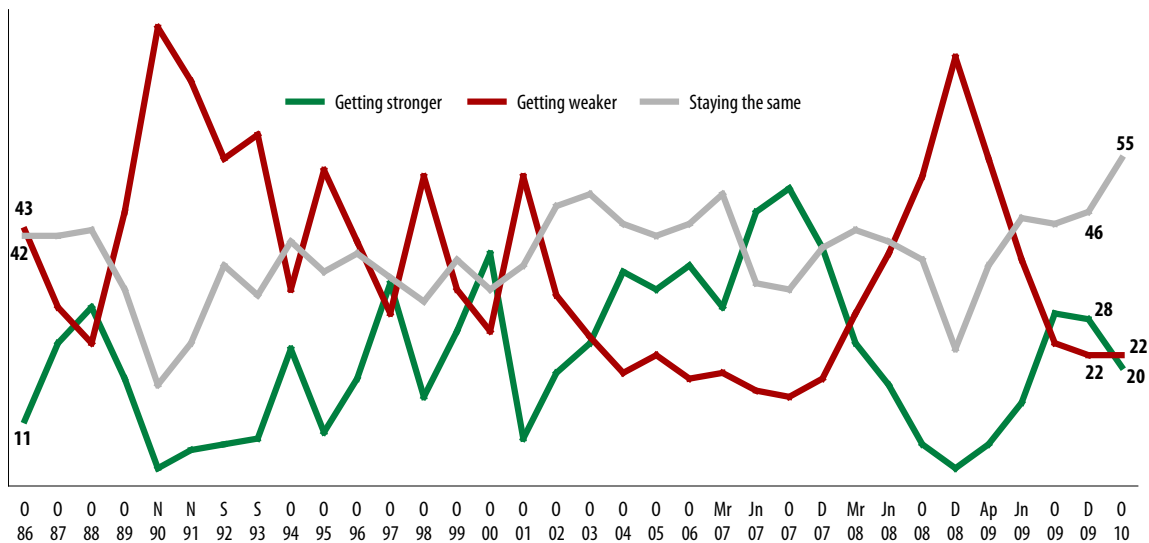
STRENGTH OF THE CANADIAN ECONOMY. With recovery from the recession still underway, Canadians are not particularly optimistic about the current state of the country's economy. Only one in five (20%) believe it is getting stronger, and this is down (8 points) from last December. A marginally higher proportion (22%) say the economy is getting weaker, while an increasing majority (55%) now believe it staying about the same.

Albertans are the most positive about the current state of the Canadian economy, while Quebecers are the most negative.

Four in ten (41%) Canadians say they are worried about the overall economic situation in Canada today (6% of this group are "very" worried), compared with 58 percent who are not worried. Opinions are stable since last December, following a period of diminishing anxiety through 2009. Ontarians are most likely to be worried, along with women and older Canadians, while Albertans are least so.

Strength of the Canadian economy

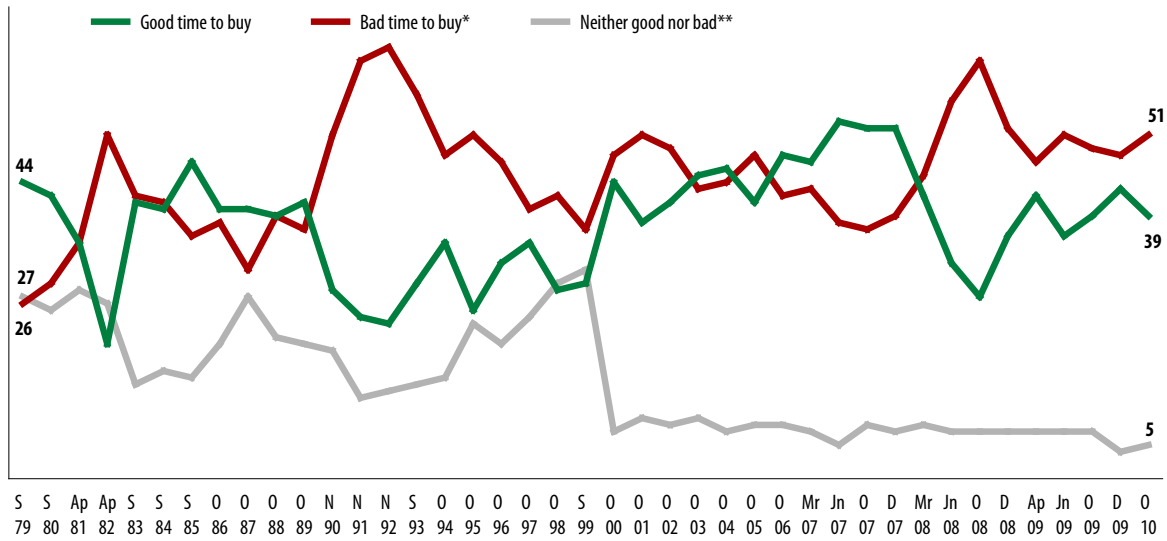
1986 - 2010



CONSUMER CONFIDENCE. A weak economy is also having a damper on consumers' eagerness to spend. Four in ten (39%) Canadians think now is a good time to buy the things they want and need, down four points from last December and reversing an upward trend through 2009. Half (51%) say it is a bad time to spend (up 3).

Consumer confidence is strongest in Alberta and Saskatchewan, as well as in Quebec (despite views in this province about current economic conditions). Confidence is weakest in Ontario and B.C., and among Canadians with the least education and income.

Consumer confidence
1979 - 2010

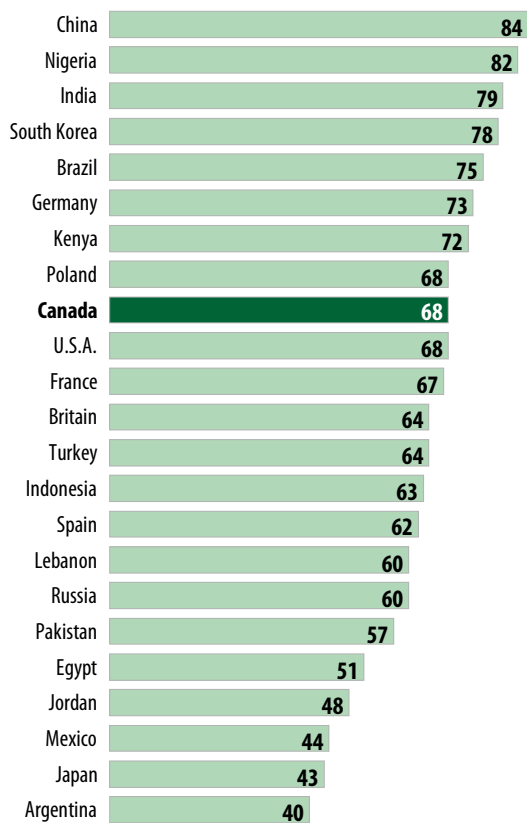


CONFIDENCE IN THE FREE MARKET ECONOMY. The recent financial meltdown and current recession have not affected Canadians' general confidence in the free market system. Seven in ten (68%) agree with the statement that "most people are better off in a free market economy, even though some people are rich and some are poor." This is essentially unchanged from Canadian opinions expressed in 2009 (66%) and 2007 (71%), and higher than 2002 (61%).

Support for the free market economy is strong across the country, but most notably Alberta (78%), and among high income earners and men, while least evident among Canadians aged 18 to 29, allophones and those with the lowest incomes.

Internationally, Canada is tied for eighth place out of 23 countries with the U.S.A. and Poland. The Chinese express the strongest confidence in the free market system (84%), followed by residents of Nigeria, India, South Korea, Brazil, Germany and Kenya. Such confidence is least evident in Mexico, Japan and Argentina (40%).

Most people are better off in a free market economy
International



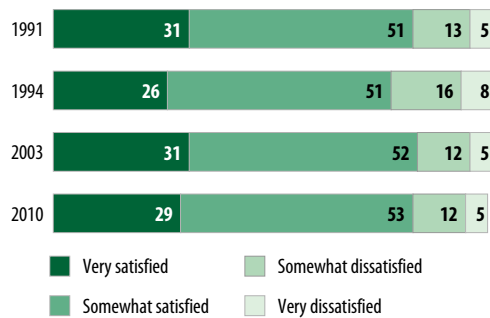
Note: International data from Pew Research Center

STANDARD OF LIVING. Most Canadians are reasonably, if not fully, satisfied with their current standard of living, and this view has remained remarkably stable over the past two decades, including the last two years of challenging economic conditions. Three in ten (29%) are very satisfied and another 53 percent somewhat satisfied, compared with 17 percent who express dissatisfaction.

Across regions, however, satisfaction with standard of living has shifted since 2003, declining in eastern and central Canada (especially in Quebec, down 8 points to 21% very satisfied), and increasing in the west (particularly in B.C., up 7 to 36%).

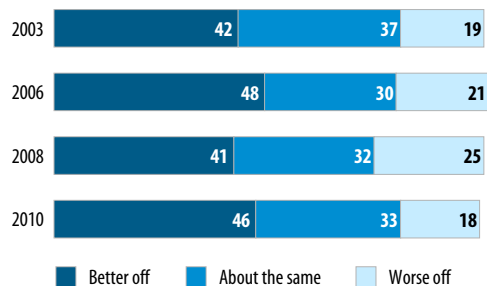
And, as before, there is a significant gap in standard of living experience across income strata, and this gap continues to widen. More than four in ten (44%) Canadians in the top income bracket say they are very satisfied with their standard of living, compared with only 16 percent in the lowest bracket.

Satisfaction with standard of living
1991 - 2010



How do Canadians view their standard of living compared with 10 years ago? The picture is noticeably positive despite the recent recession. Almost half (46%) say their standard of living has improved, compared with only 18 percent who report it is now worse (the remaining third indicate there has been little change). These results reflect an improvement over late 2008 (during the early days of the financial meltdown) and are comparable to 2006 levels. Once again, changes in living standards are closely linked to household income, although the positive trend since 2008 is evident across all income levels.

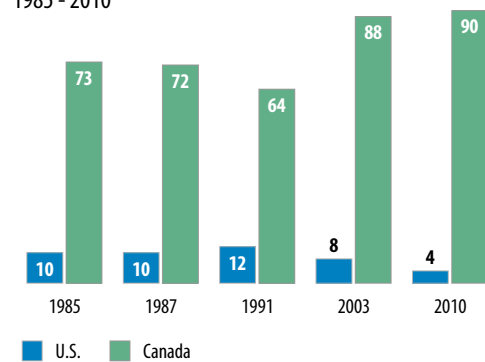
Standard of living compared with 10 years ago 2003 - 2010



Whatever challenges Canadians may be facing in making ends meet at home, almost everyone believes they enjoy a better quality of life than their neighbours to the south. Nine in ten (90%) believe it is Canada rather than the U.S. that provides a better quality of life for its citizens, up marginally from the 88 percent who expressed this view in 2003 (and 64% in 1991).

This is the prevailing view across the population, including those with low incomes and those dissatisfied with their own standard of living.

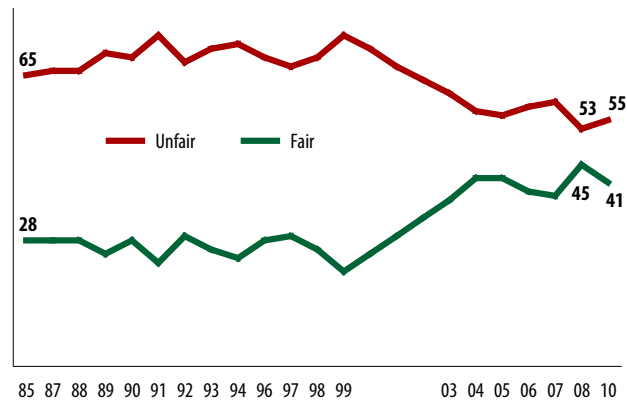
Who has better quality of life: Canada or U.S.? 1985 - 2010



TAXES IN CANADA. Taxes have never been popular, and in recent years have become a political challenge for governments faced with balancing budgets and rising costs. Not surprisingly, a majority (55%) of Canadians feel the current tax system is unfair to the average taxpayer, up marginally (2 points) since 2008, before which this proportion had been declining for much of the past decade. Four in ten (41%) believe the tax system is fair (down 4 points).

The decline since 2008 is almost entirely in Ontario and B.C. (both of which introduced a new HST), as well as in Manitoba. Albertans are now the most positive of Canadians about the fairness of the tax system (54%).

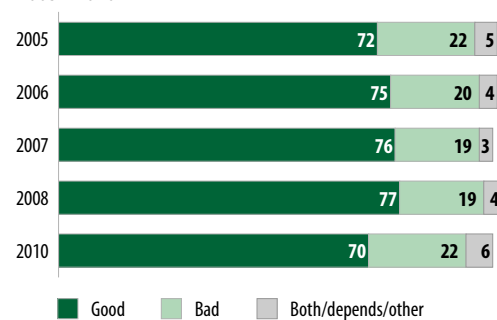
Fairness of the tax system
1985 - 2010



Apart from dissatisfaction with the amount of tax one has to pay, how do Canadians feel about the legitimacy of the tax system currently in place? Canadians continue to believe that, fundamentally, taxes are mostly a positive thing (70%) because they pay for important things that contribute to a positive quality of life, rather than a bad thing (22%) because they take money out of people's pockets and hold back economic growth.

This has been the prevailing view since 2005, but reflects a small but noticeable shift in the negative direction since 2008, almost entirely in Ontario and B.C. (once again a likely result of the new HST). A positive view of taxes is now most widespread in Atlantic Canada and Manitoba.

Taxes mostly good or mostly bad?
2005 - 2010

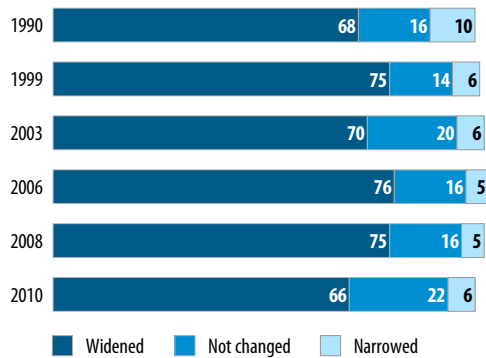


ECONOMIC INEQUALITY. Canadians have long been aware of the significant disparities in income between the rich and poor in this country, and most (66%) believe this gap has widened over the past 10 years, compared with those who say it has been stable (22%) or been narrowing (6%). But fewer now believe this gap is widening than in 2008 or most of the past decade.

This shift is evident across the country, but most noticeably in Quebec and Ontario, and among Canadians in the lowest income bracket.

Change in gap between rich and poor

1990 - 2010

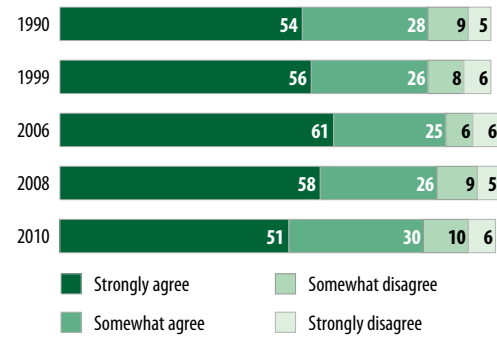


As before, most (81%) Canadians agree today that government should do something to reduce the gap between rich and poor. But the strength of this belief has diminished in the past two years, with the proportion who strongly take this position now at 51 percent (down 7 points from 2008), and the lowest recorded since 1990.

This latest trend is evident in most parts of the country, except in Alberta and Manitoba where residents are least apt to feel strongly about the need for government action to reduce income disparities. Residents of Quebec and Ontario are most likely to strongly agree about the importance of such action, along with low-income Canadians, women and those under 30 years of age.

Government should reduce gap between rich and poor

1990 - 2010



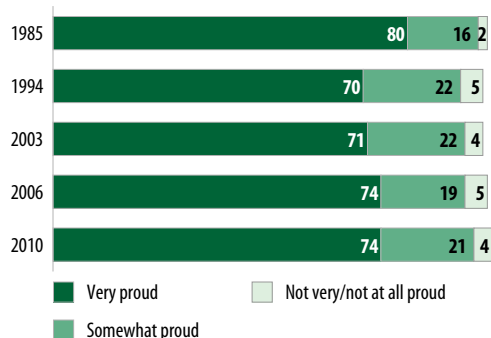
Canadian Identity and Symbols

PRIDE IN BEING CANADIAN. Canadians have long expressed pride in their country, and this sentiment remains strong in 2010. Three-quarters (74%) say they are very proud to be Canadian, with most of the remainder (21%) somewhat proud. The level of pride expressed has remained notably consistent over the past 25 years.

As before, there continues to be notable difference in strong pride between Quebecers (43%; with another 43% somewhat proud) and those living elsewhere in Canada (84% very proud). Across the population, strong pride in being Canadian increases modestly with household income and with age (only 66% of those 18-29, compared with 80% who are 60 plus). Place of birth, however, does not seem to matter, as immigrants (76%) are as likely as native born (73%) to feel strong pride in being Canadian.

How proud are you to be a Canadian?

1985 - 2010



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 (27%), consistent with what they have identified since 1994. Other reasons include the quality of life/standard of living (10%), Canadians being a humanitarian and caring people (9%), the health care system (6%) and multiculturalism (6%). These are essentially the same top reasons that Canadians have been giving since 1994. Since 2006, focus on quality life has increased (up 7 points) while multiculturalism has declined (down 5).

Basis of pride in being Canadian

Top mentions 1994 - 2010

	1994	2003	2006	2010
Free country/freedom/democracy	31	28	27	27
Quality of life	5	6	3	10
Humanitarian/caring people	9	13	9	9
Multiculturalism	3	6	11	6
Health care system	—	3	2	6
Peaceful country	7	5	6	4
Beauty of the land	7	4	4	4
Born here/my country	5	4	2	3
Social programs	—	2	1	3

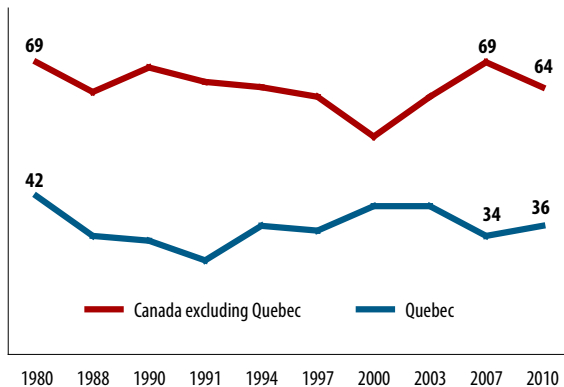
What do Canadians *like least* about their country? No one or two reasons predominate, but the most common complaints revolve around government and politics, including taxes (11%), poor government generally (9%), politics and politicians (8%), the current government or prime minister (5%), and Canadian foreign policy (2%). Others comment on Canada's climate/cold weather (9%), multiculturalism and immigration (4%), and a lack of social services (4%). One in five (19%) cannot identify anything they like least about Canada.

Opinions on this question are largely unchanged from 2006, except for a noticeable increase in mention of taxes (up 6 points), primarily in Ontario and B.C.

ATTACHMENT TO CANADA. Canadians are part of both a country and a province, and while these are not mutually exclusive, the question is to which jurisdiction people most closely identify. On balance, the Canadians are more likely to consider themselves a citizen of their country (57%) than their home province (39%), but somewhat less so than in 2007 (when the balance was 61% to 34%).

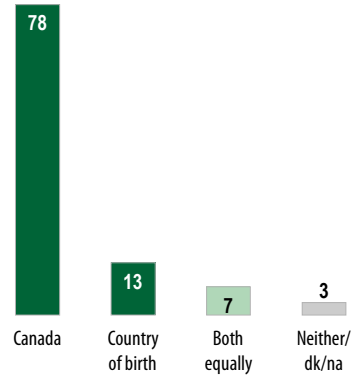
The shift to provincial loyalty since 2007 is evident in every province (except Quebec), As before, Quebecers are much less apt to identify with the country (36%) than are those living elsewhere (64%), but it is in the rest of Canada where the decline in national identification has taken place since 2007 (most notably in Alberta, Atlantic Canada and particularly in Saskatchewan, where residents are now more likely to relate to their province than the country (50% versus 43%). Identification with Canada is highest among Canadians with the most education and income, as well as among men and older Canadians.

Identify more with country than with province
1980 - 2010



What about the one in five Canadians who were born in another country – where does their strongest attachment lie? Eight in ten (78%) say they feel a stronger attachment to Canada, compared with 13 percent who identify more closely with their country of birth. Another seven percent insist they feel equally attached to both.

Identification with Canada versus country of birth



Subsample: Those born outside of Canada

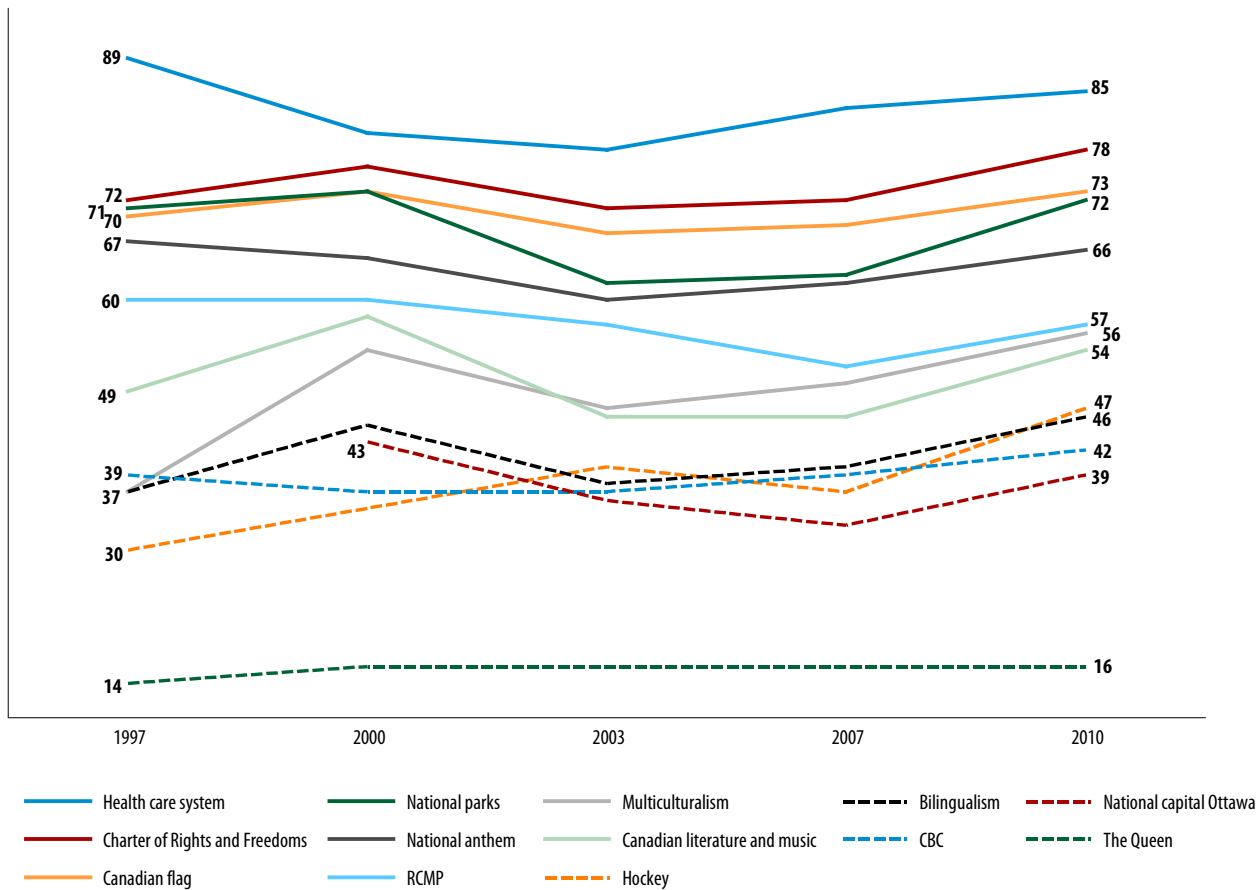
CANADIAN SYMBOLS. Every country has symbols that are key to national identity. The latest Focus Canada survey reveals that Canadians continue to place strong importance in a number of established symbols, and that the degree of importance placed on all but one has increased since 2007. At the top of the list continue to be the country's health care system (85% say very important), followed by the Charter of Rights and Freedoms (78%), the Canadian flag (73%), National Parks (72%) and the National Anthem (66%). Fewer than six in ten place such importance on the RCMP (57%), multiculturalism (56%), Canadian literature and music (54%), hockey (47%), bilingualism (46%), the CBC (42%) and the national capital in Ottawa (39%). Consistent with previous waves, Canadians are least likely to place great importance on the Queen (16%) as a symbol of Canadian identity, and this proportion has remained unchanged since 1997.

Quebecers are less likely than other Canadians to place strong importance on such symbols as the National Capital, the RCMP, the National Anthem and the Canadian flag. But they place equal importance on multiculturalism, and are more likely than others to identify strongly with bilingualism and the CBC/Radio Canada.

Across the country, there are generational differences in the importance placed on many Canadian symbols. Youth (aged 18 to 29) are less likely than older generations to identify strongly with such established symbols as the flag, the National Anthem, the RCMP, National Parks and the National Capital; this reverses the previous trend between 2003 and 2007. At the same time, youth are also more likely than older cohorts to place strong importance on bilingualism, multiculturalism, and the Charter of Rights and Freedoms.

Importance of symbols of Canadian identity

Very important 1997 - 2010

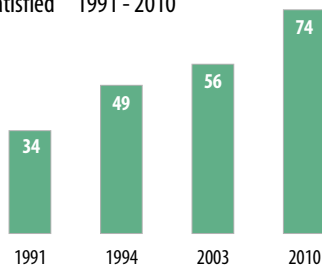


National Unity and Governance

SYSTEM OF GOVERNMENT. The media is full of stories about how governments are not meeting their obligations, letting the public down, and overtaxing hardworking families. Yet at a broad level, Canadians are expressing a record high degree of confidence in the underlying system of government. Three-quarters say they are very (19%) or somewhat (55%) satisfied with the Canadian system of government, up 18 points from 2003 and more than double the proportion expressing this view in 1991.

This trend has taken place across the country, but most significantly in Alberta (75% satisfied, up 33 points since 2003), reversing a previous downward trend. Satisfaction levels now range from a high of 82 percent in Manitoba to a low of 70 percent in Quebec and B.C.

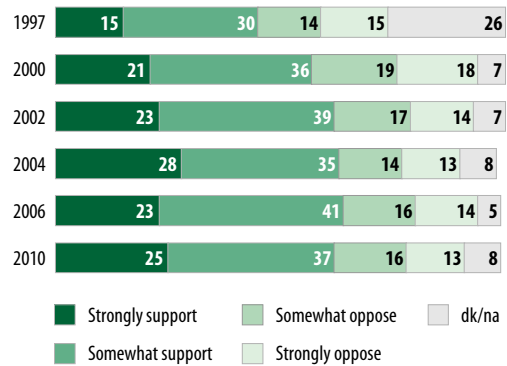
Satisfaction with Canadian system of government
Satisfied 1991 - 2010



PROPORTIONAL REPRESENTATION. The public's underlying confidence in the system of government helps to explain the lack of any growing groundswell of support for changing the system through proportional representation (which failed to win voter approval in B.C., Ontario and PEI in recent years). A majority (62%) of Canadians continue to support proportional representation in principle, but this level of support is essentially unchanged since 2002.

Since 2006, support has increased marginally in eastern and central Canada, while declining more noticeably in the west (especially in Saskatchewan where only 47 percent now favour the concept (down 14 points). Support is now highest in Quebec and among Canadians under 45 years of age. Strong opposition is most noticeable in Vancouver.

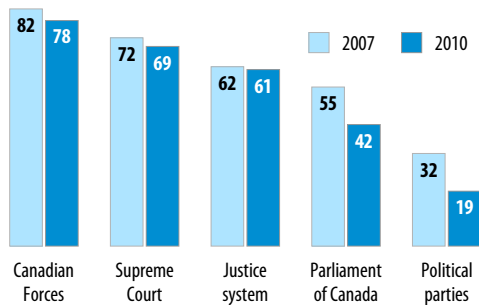
Support for proportional representation
1997 - 2010



CONFIDENCE IN INSTITUTIONS. How much confidence do Canadians have today in the country's major governing institutions? In some cases, public confidence is strong and reasonably stable, in others it has diminished noticeably. In the first case, Canadians continue to express strong confidence in the country's military – the Canadian Forces (78%, down 4 points since 2007), the Supreme Court of Canada (69%, down 3) and the country's justice system (61%, down 1). In contrast, fewer than half (42%) now have a similar level of confidence in the Parliament (down 13 points), and fewer than half as many (19%) are now confident in the country's political parties (down 13).

Confidence in the justice system and Supreme Court is highest in Ontario and lowest in B.C., and in both cases also increases along with socio-economic status. Confidence in the Canadian Forces is now highest in Saskatchewan (91%) and lowest in Quebec (65%). Declining confidence in Parliament and political parties is consistent across the country.

Confidence in institutions
2007 - 2010



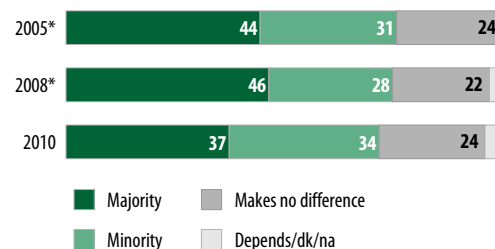
MINORITY GOVERNMENT. Canada has had a minority government since 2004, the longest stretch in the country's history. Canadians are currently divided about whether this is in the best interest of the country, although they appear to be growing somewhat more comfortable with minority Parliaments over the past few years. Currently, one-third (34%) say minority government is better for the country, compared with 37 percent who prefer to see a majority (another 24% say it makes no difference either way). This current split reflects a more divided perspective than in 2005 and 2008, when greater proportions endorsed majority governments (44% and 46%, respectively).

Across the country, support for minority governments is strongest in Atlantic Canada, Quebec, Manitoba and Saskatchewan, while support for majority governments is most evident in Ontario, Alberta and B.C. By federal party preference, NDP supporters are most likely to endorse minority governments (47%), while Conservative supporters are strongest on a majority (51%).

Do Canadians believe it matters which political party is in power in Ottawa? Two-thirds (64%) believe it does, and this view has strengthened since 2004 (when only 56% expressed this view). Belief in the difference between parties is strongest in B.C. and Toronto (69% each), as well as among Canadians aged 18 to 29, and those with the most education and income, while least evident in Atlantic Canada (53%). Supporters of the federal Liberal and Conservative parties are much more likely to share this view than those who support the Green Party or remain undecided.

Minority or majority government better for country?

2005 - 2010



* Tracking data from surveys conducted by Environics Research Group for CBC

GOVERNMENT SPENDING PRIORITIES. Canadians' opinions about where the federal government should be spending more and spending less are largely as they have been over the past decade. But, since 2008, the priority placed on spending more has declined across most areas, signalling a reduced appetite or expectation for growing government expenditures (possibly a reaction to the recent stimulus package and/or concerns about growing deficits). As before, the public is most likely to look for higher spending in such areas as reducing child poverty (78%), education (70%), health care (69%), social services for the elderly (69%) and environmental protection (62%) – all of which are down four to nine percentage points (except for social services for the elderly, which is unchanged).

The bottom of the list continues to include such areas as domestic security (28% say government spending should increase), national defence (26%), the justice system (24%) and foreign aid (19%); in these areas, comparable proportions would like to see reduced spending, while the majority/plurality advocate stable funding.

The areas showing the greatest *decline* in public support for increased spending since 2008 include the justice system (down 15 points), child care (down 12) and energy development (down 11). Areas showing no change in support for increased spending include Employment Insurance (30%, up 1), arts and culture (30%, up 1), and support to farmers (51%, down 1). Support for increased spending in some areas peaked in 2008 (e.g., transportation/infrastructure, job creation, assistance to cities), and has been declining since mid-decade in other areas (national defence, foreign aid, domestic security, social services for the poor).

Federal government spending priorities

Spend more 1994 - 2010

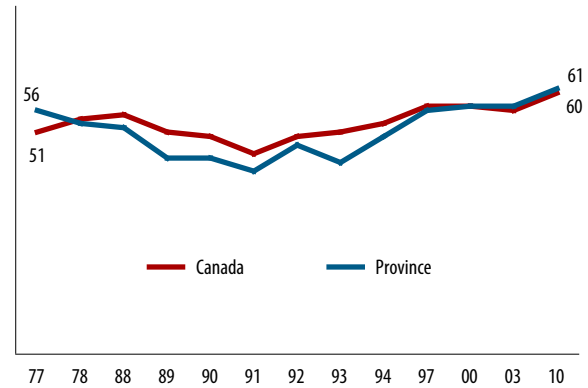
	1994	1999	2003	2004	2005	2006	2007	2008	2010
Reducing child poverty	–	70	76	78	79	83	78	82	78
Education	56	72	73	74	80	79	71	77	70
Health care	41	75	80	77	81	81	80	78	69
Social services for elderly	48	60	64	66	66	68	69	69	69
Environmental protection	38	50	58	63	67	71	74	70	62
Programs for poorer regions	46	53	60	66	65	67	60	65	60
Job creation programs	57	58	55	54	55	64	48	66	58
Social services for the poor	41	53	56	59	61	81	60	60	55
Transportation/infrastructure	16	23	54	56	60	57	57	60	54
Support to farmers	28	42	48	51	54	52	47	52	51
Child care	42	50	52	54	52	60	52	62	50
Energy development	24	30	49	57	58	63	55	57	46
Canadian sovereignty in coastal waters	–	–	–	–	–	–	46	40	38
Assistance to cities	–	–	36	43	40	40	37	43	34
Employment Insurance	–	35	30	28	30	33	25	30	31
Aboriginal peoples	–	17	21	27	25	30	25	32	30
Arts and culture	15	18	23	24	23	24	24	29	30
Domestic security	–	–	–	–	38	38	38	30	28
National defence	14	28	47	53	50	44	38	30	26
Justice system	20	25	30	30	34	39	35	39	24
Foreign aid	–	–	17	36	34	27	21	22	19

BILINGUALISM. Bilingualism has been an official federal policy for more than 40 years, and while it has had limited impact on many parts of the country, Canadians' support is at an all-time high. Six in ten (60%) favour bilingualism for all of Canada, up four points since 2003 and now at its highest level since 1977. This trend is evident in all parts of the country except B.C. (although up significantly in Vancouver) and notably in Alberta (51% up 10), as well as among men and Canadians under 45 years of age. Support for bilingualism in Canada continues to be strongest in Quebec (90% up 1 and at the highest level in this province since 1977), and lowest in Saskatchewan (39%, up 3) and among Canadians aged 60 plus (49%, down 7).

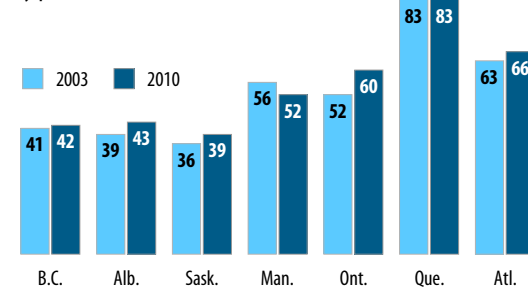
Similar levels of support are also expressed for bilingualism *in one's own province*, although regional differences are somewhat more apparent. Six in ten (61%) favour bilingualism for their own province, up four points since 2003 and also at the highest level since 1977. Support is strongest in Quebec (83%) and Atlantic Canada (66%), while lower in the three most western provinces – Saskatchewan (39%), Alberta (43%) and B.C. (42%) – where support is only marginally stronger than before. Generational differences are also evident in this case, with support increasing among Canadians under 30 (75%, up 9) and declining among those aged 60 plus (52%, down 7).

While Canadians are becoming more supportive of bilingualism in principle, they are placing less importance on speaking the other Official Language. Fewer than four in ten (38%) anglophones now agree it is important to speak French (down from 66% in 1985), and just under half (48%) of francophones agree it is important to speak English (versus 98% in 1985). This decline is most dramatic among Canadians with a university education (29% now agree, down 43 points).

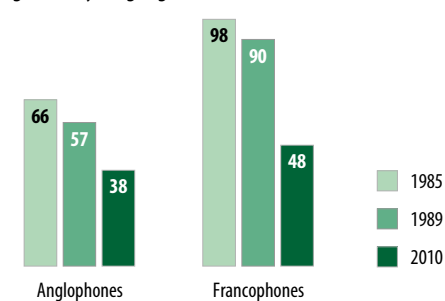
Support for bilingualism in ...
1977 - 2010



Support for bilingualism in own province
By province 2003 - 2010



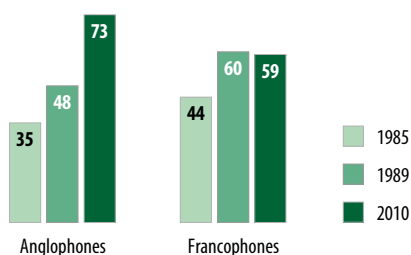
It is important to speak the other official language
Agree By language 1985 - 2010



ENGLISH-FRENCH RELATIONS. English-French relations in Canada are now less contentious than in previous decades. However, language-based differences have not disappeared, especially among anglophones. Three-quarters (73%) of anglophones now agree that *“French-Canadians and English Canadians disagree on most things today,”* almost doubling from 35 percent in 1985. A similar trend is apparent among francophones, but unlike before they are now less likely than anglophones to agree with this statement (59%, up 15 points since 1985).

French and English Canadians disagree on most things these days

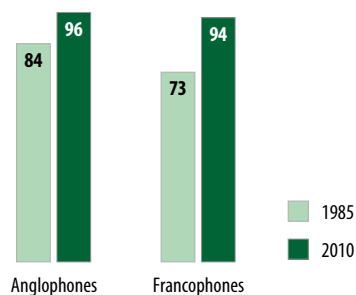
Agree By language 1985 - 2010



Whatever divisions Canadians see along the language divide may also be something most believe will diminish over time. Almost all anglophones (96%) and francophones (94%) alike now agree with the statement that *“Young French-Canadians and young English-Canadians generally have the same interests,”* reflecting a notable increase in agreement levels from 1985 (84% and 73%, respectively). This trend is evident across the population, but strong agreement has grown most significantly among Canadians aged 60 plus.

Young French and English Canadians generally have the same interests

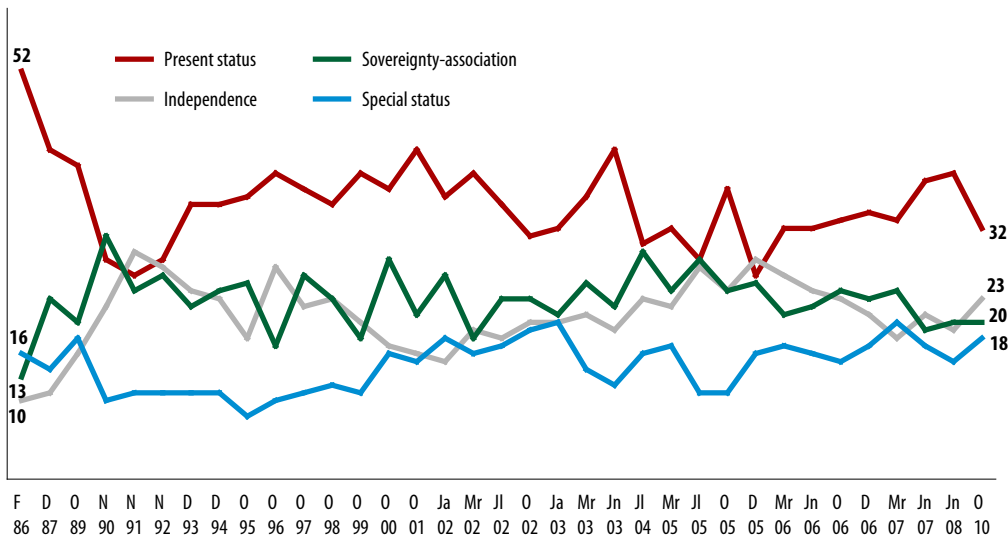
Agree By language 1985 - 2010



CONSTITUTIONAL OPTIONS FOR QUEBEC. The constitutional issues surrounding Quebec's place in confederation remain largely unresolved. Public support for outright separation from Canada remains low, but Quebecers are expressing less satisfaction with the status quo than in the past couple of years. Since mid-2008, the proportion of Quebecers favouring their province's current status within confederation has declined to 32 percent (down 7 points), while there is increasing support for the options of independence (23%, up 4) and special status (18%, up 3). One in five (20%, unchanged) continue to prefer the option involving some type of special status within Canada.

The shift in support from current status to independence is most noticeable among Quebecers under 30, while those aged 60 plus continue to be most in favour of the status quo.

Constitutional options for Quebec
Quebec 1986 - 2010

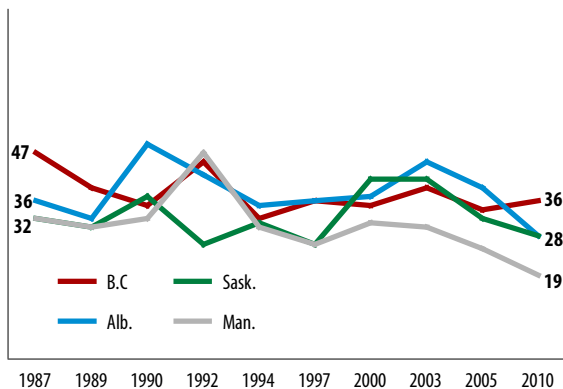


Base: Quebec residents

WESTERN ALIENATION. How do western Canadians feel about their place in Canada, given a history of frustration and anger at what is seen as too much control by easterners? The sense of alienation is considerably weaker than in past decades, and has diminished further since 2005 in the Prairie provinces. Focus Canada has been tracking a set of “agree-disagree” statements that serve as key indicators of the evolving trend:

“Western Canada gets so few benefits from being part of Canada that they might as well go it on their own.” Only three in ten (30%) westerners now agree with this statement, down four points since 2005 and the lowest regional proportion since 1987. This view is now at historic lows in Alberta (28%, down 11), Saskatchewan (28%, down 4) and Manitoba (19%, down 6), and is up marginally in B.C. (36%, up 2), although well below the peak recorded in this province in 1987 (47%). Since 2005, this view has declined most significantly among westerners under 30 (17%, down 15).

West gets so few benefits, it should go it alone
1987 - 2010



“In many ways, Canada’s western provinces have more in common with the western U.S. than they do with the rest of Canada.” Four in ten (42%) of westerners agree with this statement, largely unchanged from 2005. Agreement is up marginally in B.C. (48%, up 2) and Manitoba (39%, up 7), and down in Saskatchewan (34%, down 3) and Alberta (38%, down 10).

“There is no such thing as Western Canada, people in each province have very different views from the others.” Just over half (53%) of westerners concur with this statement, unchanged from 2005. Opinions are now essentially the same across the four provinces, which since 2005 reflects rising agreement in Manitoba (up 9 points) and Saskatchewan (up 4), and declining agreement in B.C. (down 4).

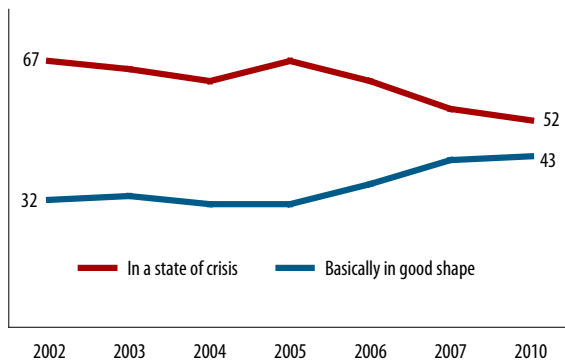
Health Care

CURRENT STATE OF CANADA'S HEALTH CARE SYSTEM.

Health care has not been front and central on the national agenda, and there has been surprisingly little change in the public's broad opinions. Just over four in ten (43%) believe Canada's health care system is basically in good shape (up 1 point from 2007), compared with a bare majority (52%, down 3) who consider it to be in a state of crisis.

This stability masks regional trends, with opinions improving in Atlantic Canada (up 6), B.C. (up 9) and Manitoba (up 16), and declining in Saskatchewan (down 14) and Alberta (down 6). Assessment of the health care system is most positive in Manitoba (63%) and Ontario (50%), and least so in Quebec (25%).

State of Canada's health care system
2002 - 2010

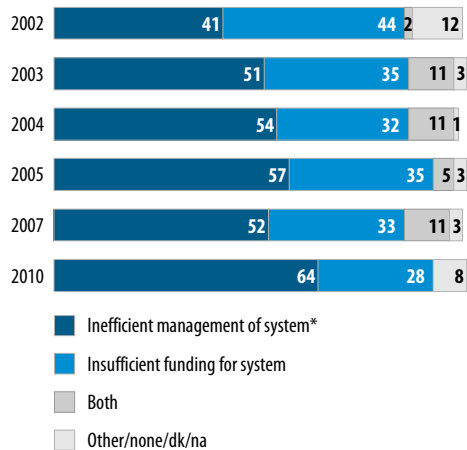


When asked about the main cause of problem in the health care system, an increasing majority of Canadians point to inefficient management of the system (64%) over insufficient funding (28%), continuing a trend dating back to 2003. Emphasis on inefficiency is the majority view across the country, but most widely in Quebec, and least so in Atlantic Canada (53%).

Canadians' assessment of the federal government's performance in managing health care issues is also largely unchanged from 2007. Just over one in three (36%) approve of the government's performance in this area (up 2 points from June 2007), compared with 56 percent who disapprove (down 5).

Since 2007, approval is up in all parts of the country except Saskatchewan (down 20) and Alberta (down 6). Ratings are highest in Atlantic Canada (43%) and the Prairie provinces (42%), and lowest among Quebecers (28%) and women (29%).

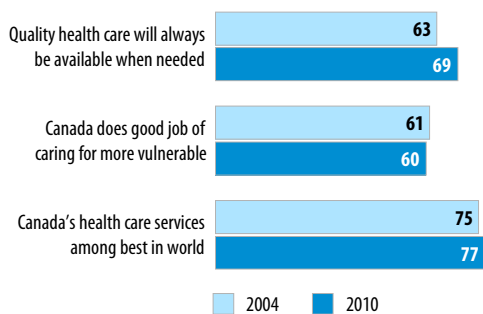
Main cause of problems
in health care system
2002 - 2010



* In 2004, "Inefficient management"

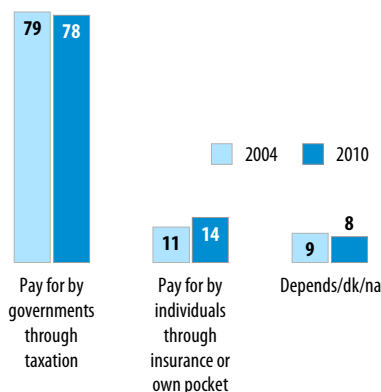
CONFIDENCE IN THE HEALTH CARE SYSTEM. While many Canadians see the country's health care system in crisis, the public's confidence in the system remains remarkably resilient. Seven in ten (69%) believe the quality of the health care system will always be available when needed (up 6 points since 2004), and six in ten (60%, down 1) say it does a good job caring for the vulnerable in society. Three-quarters (77%, up 2) maintain Canada's health care system is among the best in the world. Opinions are largely similar across the country, except in Quebec where the view is more negative.

Confidence in the health care system 2004 - 2010



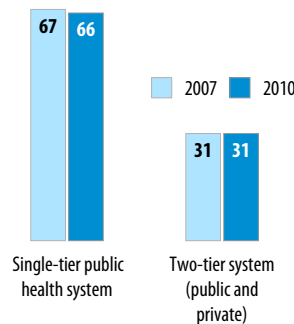
HEALTH CARE FUNDING POLICY. Despite increasing calls from many quarters to relieve pressures on government budgets by introducing private health care options, Canadians remain strongly wedded to the current government-funded single-payer system. Eight in ten (78%) continue to say that their health care expenses should be paid for by governments through tax dollars, rather than by individuals through insurance or other means (14%), largely unchanged from 2004. This view is held widely – voiced by at least three-quarters from every region.

Public vs. private funding of health care expenses 2004 - 2010



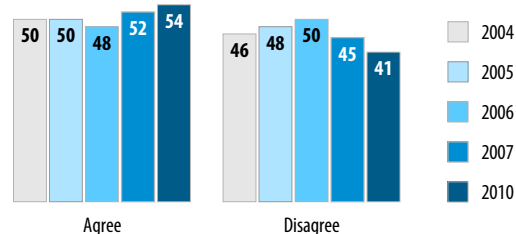
Canadians also continue to express a strong preference for a single-tier public health system (66%) over a two-tier system (31%) that includes a private system in which individuals can get faster access by paying directly. These proportions are essentially unchanged since 2007. As before, support for a two-tier system is greater in Quebec (40%), but less so than in 2007 when opinion was evenly split. Support for the current single tier system is strongest in Atlantic Canada and Ontario (73%).

Preferred type of health care system 2007 - 2010



Despite the public's preference for the single-tier system, a small majority (54%) also agree that Canadians should have the right to purchase private health care if they do not receive timely access to services through the public system (up 2 points since 2007). Four in ten (41%, down 4) disagree with this option. Support for private health care continues to be most popular in Quebec (60%), but this is the only part of the country where this view has declined since 2007 (down 9).

Right to buy private health care to ensure timely access 2004 - 2010



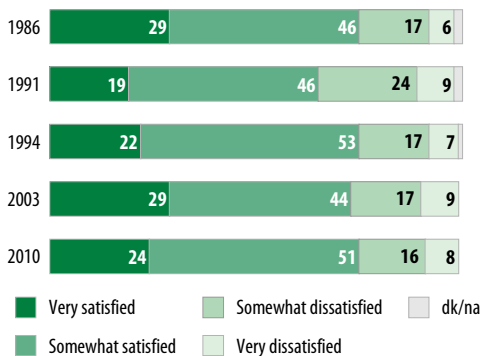
Environment

STATE OF THE ENVIRONMENT. The environment has been a major source of public concern for the past three decades, and this has persisted through the recent economic recession. At the same time, Canadians continue to be markedly positive about the state of the environment in their own part of the country. Three-quarters say they are very (24%) or somewhat (51%) satisfied with the quality of the environment in their area of the country, compared with one-quarter (24%) who are dissatisfied. This perception has remained largely stable over the past 25 years; strong satisfaction is down somewhat since 2003 (when it stood at 29%), but remains well above the level recorded in 1991 (19%).

Strong satisfaction is most widespread in B.C. and Saskatchewan, as well as among men and rural residents, and this view has declined most noticeably since 2003 in Quebec and Manitoba. Opinions are least apt to be positive in Quebec and Toronto, as well as among Canadians 30 to 44 years of age and those with a university education.

Satisfaction with environmental quality in your area

1986 - 2010

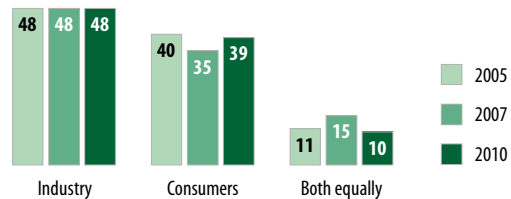


GREATEST THREAT TO THE ENVIRONMENT. Who do Canadians see as posing the greatest threat to the environment? As before, opinion is largely divided between those who identify industry (which produces chemicals and waste that threaten air, water and soil) (48%) and those who point the finger at consumers (who buy, use and dispose of the products that industry produces and have certain lifestyle expectations) (39%). One in ten (10%) insist that industry and consumers are equally responsible.

Views on this question are largely unchanged since 2005, with a modest increase since 2007 in those identifying consumers rather than both equally (with this trend most evident among women, older Canadians, those with less education/income, and residents of Alberta and Manitoba). Industry is most likely to be seen as responsible in Quebec (54%), while Albertans are most apt to place the primary responsibility on consumers (49%).

Greatest threat to our environment

2005 - 2010



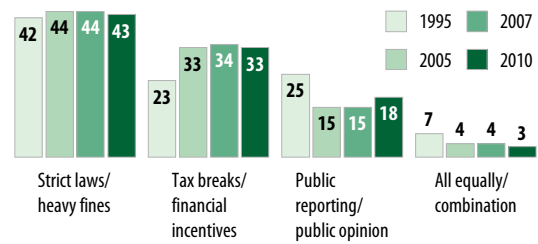
STRATEGIES TO REDUCING INDUSTRY POLLUTION.

What is the best strategy for ensuring that Canadian industries reduce their negative impact on the environment?

As in previous years, there is no public consensus on this question, but Canadians continue to place greater confidence in “command and control” approaches involving laws, regulations and heavy fines for infractions (43%), over economic strategies involving tax breaks and financial incentives (33%) or public reporting of company pollution levels to embarrass companies into cleaning up (18%).

Opinions have remained largely stable since 1995, with a modest shift since 2007 from laws and regulations to public reporting. Views are now largely similar across the population, but there have been some shifts in preference in the direction of laws and fines (Ontario, Alberta), economic measures (Atlantic Canada, Quebec, Saskatchewan), and public reporting (Manitoba, Alberta, Canadians 18 to 29, and those with the lowest incomes).

Most effective approach to reduce industry pollution 1995 - 2010

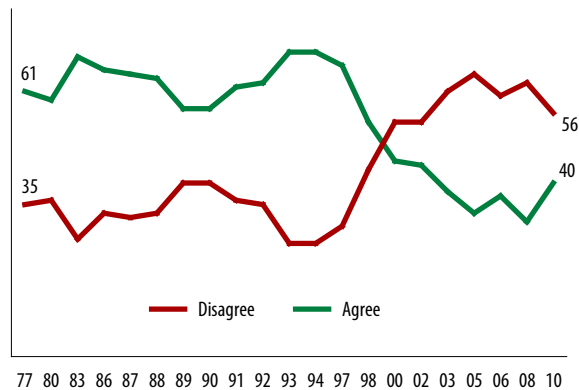


Immigration and Multiculturalism

ATTITUDES TOWARD IMMIGRATION. Multiculturalism has in recent years been widely considered to be a success in Canada (in sharp contrast to many other western nations), and increasingly how Canadians define their country. But issues about immigration rise up from time to time, and public support has softened since 2008. The following “agree/disagree” statements serve as key indicators of this trend:

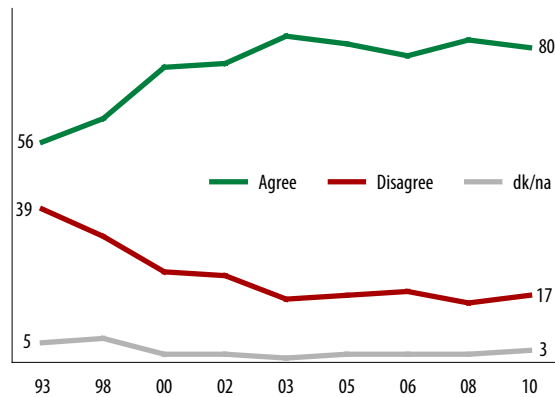
“Overall, there is too much immigration in Canada.” As before, a clear majority (56%) of Canadians disagree with this statement, but this is down seven points from 2008 and now at its lowest point since 2002. Four in ten (40%) now agree there is too much immigration in Canada. This trend is evident across the country, but most noticeably in Ontario, Manitoba and Saskatchewan, as well as among women and older Canadians.

Immigration trends are too high
1977 - 2010



“Overall, immigration has a positive impact on the economy of Canada.” A strong majority (80%) agree with this statement, essentially unchanged over the past seven years, while one in five (17%) disagree. Opinions are similar across the country, but a positive view about the economic impact of immigrants is down noticeably in the Prairies since 2008.

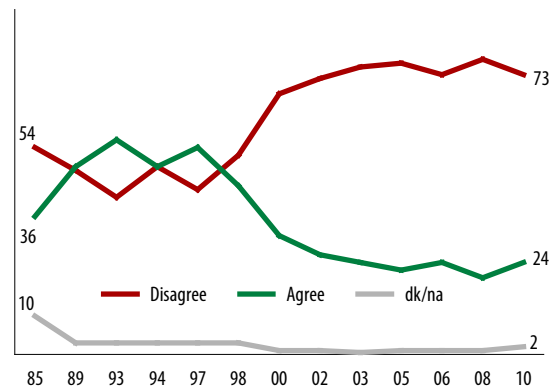
Economic impact of immigration is positive
1993 - 2010



“Immigrants take away jobs from other Canadians.”

Consistent with the previous statement, most (73%) Canadians disagree that immigrants take jobs from other Canadians, with this proportion down slightly since 2008 (down 4 points) and returning to 2006 levels. One in four (24%) agree with this statement, increasing over the past two years, primarily in Ontario, Manitoba and Alberta.

Immigrants take away Canadian jobs
1985 - 2010



“Non-whites should not be allowed to immigrate to Canada.”

As has been the case for the past 25 years, almost all (92%) Canadians disagree with this statement, a perspective which is shared across the country. Those who express the opposite viewpoint are most likely to live in rural areas and have not completed high school.

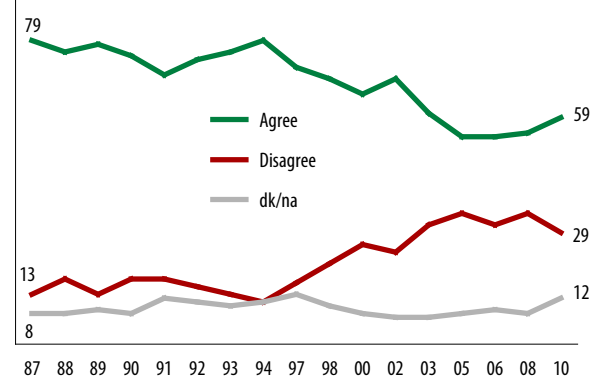
“Many people claiming to be refugees are not real refugees.”

Six in ten (59%) Canadians agree with this statement, up from 55 percent in 2008, and reversing a downward trend dating back to 2002. Three in ten (29%) disagree (down 5 points). Rising concern about bogus refugee claimants is most evident in the west, and is now most pronounced in Alberta (69% agree). In contrast, this view has declined in Quebec (to 43%, down 7 points).

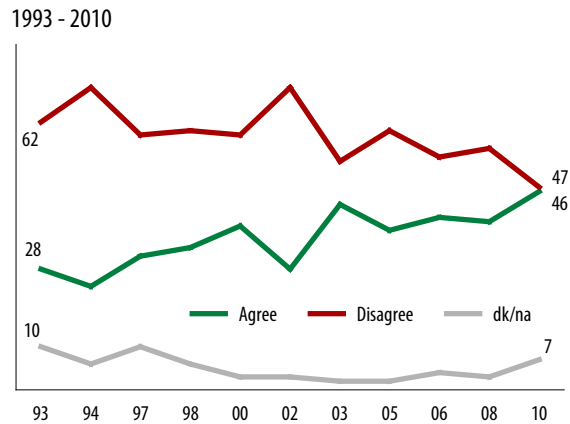
“Canada is doing a good job of keeping criminals and suspected criminals out of the country.” The most notable shift in attitudes has been on this statement, possibly due to how the federal government handled the recent arrival of Tamils by boat in Vancouver (they claimed to be refugees but some were suspected of being criminals). Close to half (46%) of Canadians now agree that Canada is effective in keeping criminals out of the country, up seven points since 2008 and now at the highest level recorded since 1993. A comparable proportion (47%) disagree (down 9). The positive trend is most evident in Ontario and Quebec, as well as among Canadians aged 18 to 29 (68% in this group now agree with the statement, up 16 points since 2008). Agreement is lowest in B.C. (34%).

“There are too many immigrants coming into this country who are not adopting Canadian values.” Despite generally positive attitudes about immigration, Canadians remain ambivalent about the motivations and success with which newcomers integrate culturally into the country. As before, a majority (66%) agree with this statement, and this proportion has risen (up 6 points since 2008), returning to 2006 levels. This increase is evident in every part of the country except Quebec (64%, up 1), and is now highest in Alberta (71% agree), and lowest in Manitoba and Atlantic Canada (59% each).

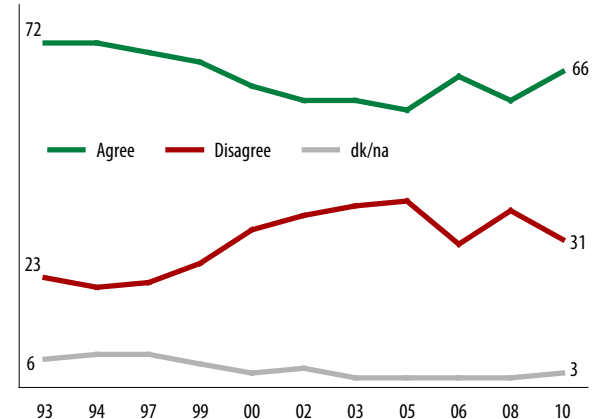
Many refugee claimants are not legitimate
1987 - 2010



Immigration controls are effective in keeping out criminals
1993 - 2010



Too many immigrants do not adopt Canadian values
1993 - 2010

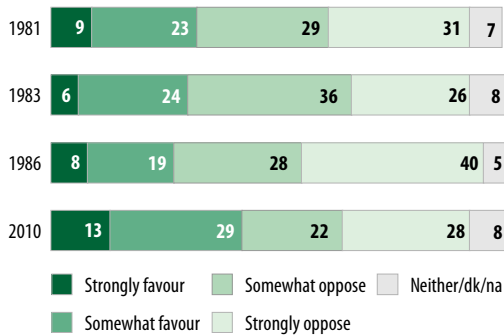


REFUGEE POLICY. The arrival of a ship full of Tamil refugees off Canada's west coast forced the government to decide how to handle a large number of refugees not following normal procedures for refugee status. Canadians are currently divided about what to do in such situations. Four in ten strongly (13%) or somewhat (29%) favour accepting political refugees who do not qualify for entry into Canada under normal channels, while a larger proportion somewhat (22%) or strongly (28%) oppose such a policy. While these results reflect a divided populace, support for accepting political refugees is notably higher than it was in the 1980s. In 1986, fewer than three in ten (27%) favoured such a policy, compared with 68 percent who opposed it (with 40% strongly opposed).

Support for accepting all refugees is greatest in Quebec (though still a minority at 48%) and lowest in B.C. (34%), as well as among allophones, low income Canadians and those without a high school diploma. There is also a generational divide on this issue: A liberal policy toward political refugees is favoured by 54 percent of Canadians under 30, compared with just 30 percent of those aged 60 plus.

Should Canada accept political refugees who do not otherwise qualify for immigration?

1981 - 2010



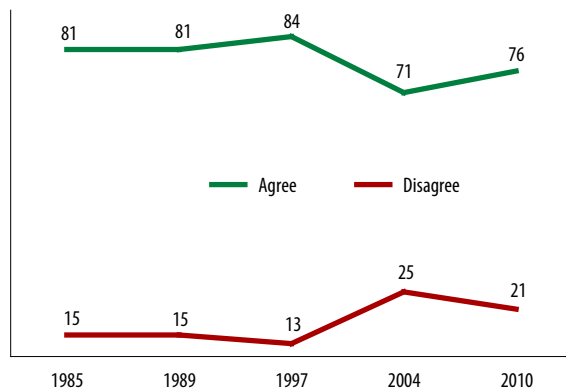
ATTITUDES TOWARD MULTICULTURALISM.

Multiculturalism presents challenges to both new Canadians (who must fit in and succeed) and for the native population (to accept and become comfortable with increasing diversity). Multiculturalism remains a positive reality for the majority of Canadians but opinions have hardened a bit since 2004, reverting back to where they stood in the mid-1990s. This trend is reflected in the latest results of several "agree/disagree" statements:

"Ethnic groups should try as much as possible to blend into Canadian society and not form a separate community."

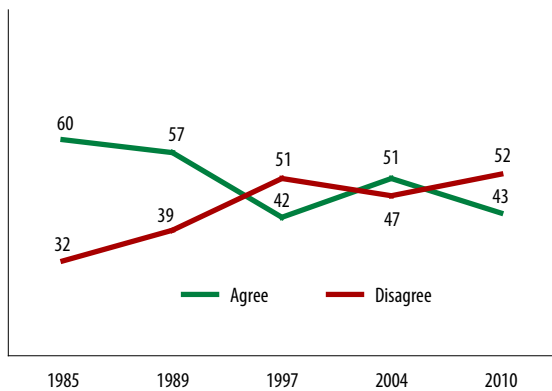
Three-quarters (76%) of Canadians agree with this statement, up from 71 percent in 2004, although below the levels recorded in the 1980s and 1990s. This upward trend is evident everywhere except Atlantic Canada, and most noticeably in Ontario, B.C. and Saskatchewan. Quebecers (88%) are most likely to endorse this viewpoint, along with Canadians aged 60 plus.

Ethnic groups should blend into Canadian society 1985 - 2010



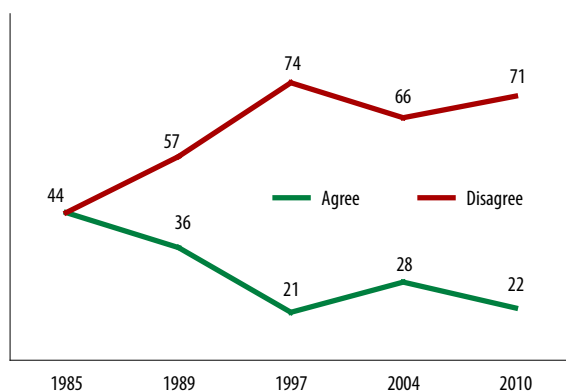
“It is more difficult for non-whites to be successful in Canadian society than it is for other groups.” Belief in this kind of barrier for non-white individuals has declined over the past several years, and is now below the 50 percent mark (43%), compared with half (52%) who disagree. Agreement with this statement remains highest in Quebec (51%) and is now lowest in Alberta (33%). The opinions of allophones is close to the national average; immigrants from non-European countries are more likely than others to agree with this statement.

It is more difficult for non-whites to succeed in Canada
1985 - 2010



“Governments should require employers to advance non-whites to higher positions.” Sympathy for the barriers facing non-whites notwithstanding, there is little public support for government-mandated affirmative action. Only one in five (22%) Canadians agree with this statement, down from 28 percent in 2004. Support has diminished across the country, even among allophones, although this group remains more likely to favour such a policy than any other group (44%).

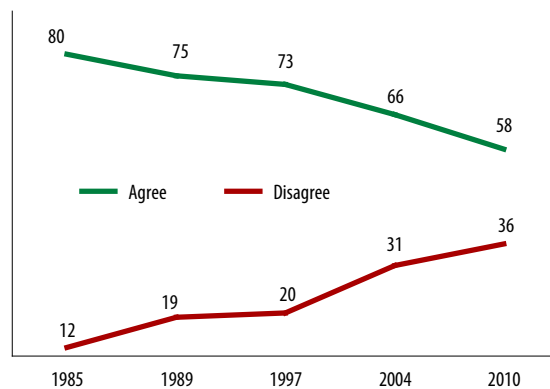
Governments should require employers to advance non-whites
1985 - 2010



“Ethnic and racial groups should take more responsibility for solving their own economic and social problems.” Belief in the importance of self-reliance has been the majority view among Canadians since the 1980s, but the strength of this perspective has been steadily diminishing. Today six in ten (58%) agree with this statement, down eight points from 2004, and now at its lowest point since 1985 (this most recent change reflects a shift from “strongly agree” to overall disagreement).

This trend has taken place in all regions except B.C., but most noticeably in Quebec, Saskatchewan and Alberta. Allophones are more likely than anglophone or francophone Canadians to endorse this statement. Older Canadians are most likely to feel ethnic groups should take responsibility, but noticeably less so than in past years.

Ethnic/racial groups should take more responsibility for solving own problems
1985 - 2010

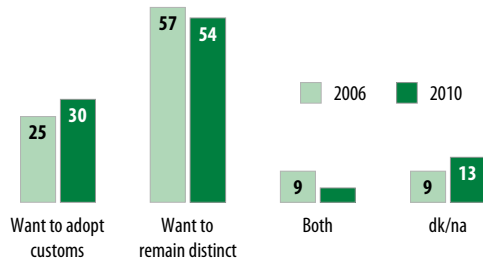


MUSLIMS IN CANADA. In 2006, Focus Canada revealed that a majority of Muslims in Canada believed co-religionists want to adopt the customs and lifestyles of this country, but most non-Muslim Canadians doubted this. In 2010, the non-Muslim public is only modestly more likely to believe this is the case (30%, up 5 points from 2006). A majority (54%) continue to believe that Muslims in Canada want to be distinct from the larger Canadian society (down 3).

This modest shift is evident across the country but most noticeably in Quebec (29%, up 10 points), and has taken place entirely among Canadians under 45 years of age (and mostly among those under 30).

Do Muslims want to adopt Canadian customs or remain distinct?

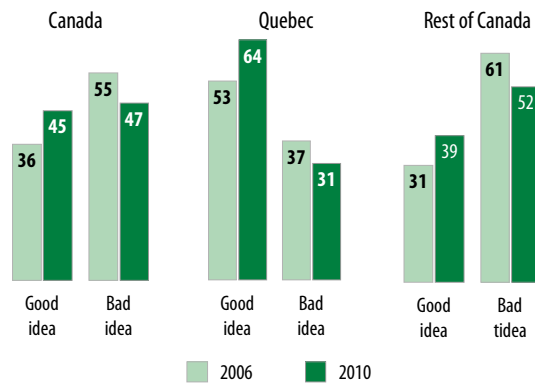
2006 - 2010



One of the most visible signs of Muslim identity is the headscarf, which has now been banned for public display in France. A growing minority of Canadians believe this is a good idea (45%, up 9 points since 2006), and this continues to be especially popular in Quebec (64%, up 11), although the idea has also gained ground in the rest of Canada (particularly in Saskatchewan and B.C.), as well as among allophones and Canadians 30 to 44 years of age.

Head scarf ban a good idea or bad idea?

By region 2006 - 2010

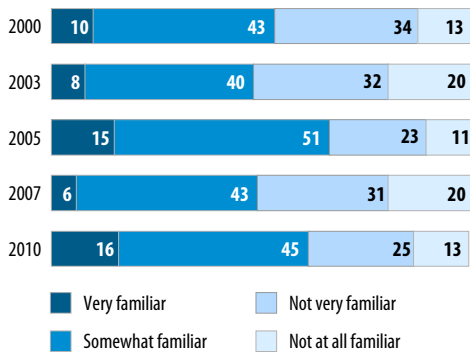


Aboriginal Peoples in Canada

FAMILIARITY WITH ABORIGINAL ISSUES. How knowledgeable does the general public feel about Aboriginal issues in Canada today? Six in ten say they are very (16%) or somewhat (45%) familiar, compared with four in ten who admit they are not very (25%) or not at all (13%) familiar. These results reflect a noticeable improvement from 2007 (when only 6% said they were very familiar), but remains below the high level recorded in 2005.

This latest trend is evident across the population, but most substantial in Manitoba and Saskatchewan, where reported knowledge is by far the strongest (31% and 37%, respectively, say very familiar). Overall familiarity continues to be lower in Quebec (39% very/somewhat familiar) than elsewhere in Canada (68%), although the positive trend since 2007 is marginally stronger in the former.

Familiarity with Aboriginal issues
2000 - 2010

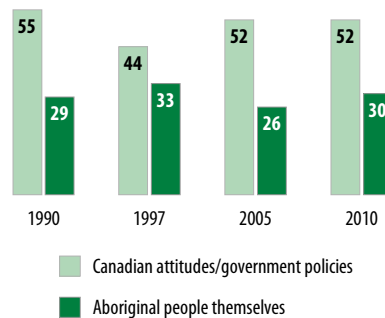


TREATMENT OF ABORIGINAL PEOPLES. In terms of who bears primary responsibility for the problems experienced by Aboriginal peoples in this country, Canadians are more likely to say it is the result of attitudes of non-Aboriginal Canadians and government policies (52%), compared with Aboriginal peoples bringing these problems on themselves (30%) (the remainder insist both are equally true or cannot offer any response).

Opinions are largely stable since 1990, and as before there is a clear regional divide between the views of Prairie province residents (who are as likely or more so to place the blame on Aboriginal peoples themselves) and those in other regions, where clear majorities/pluralities trace the problems to non-Aboriginal attitudes and government policies.

Since 2005, there has been a modest increase in placing blame on Aboriginal peoples across most of the population, but most significantly in Manitoba and Saskatchewan, as well as among rural Canadians and those without a high school diploma. Placement of responsibility on attitudes and government policy is most widespread in Toronto and Vancouver, and among Canadians aged 18 to 29.

Responsibility for Aboriginal problems
1990 - 2010

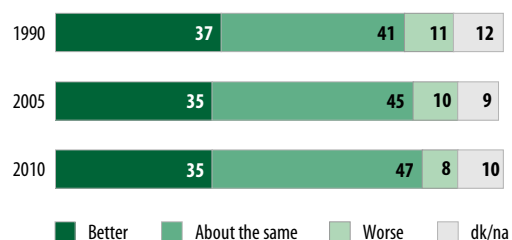


The Canadian population-at-large is generally positive about how Canada treats its native population, relative to other countries. One-third (35%) say Canada treats them better than other countries, compared with only eight percent who believe treatment here is worse. A plurality (47%) consider Canada to be about the same as other countries in this respect, while 10 percent are unable to offer an opinion.

Opinions are largely stable since 1990. Rating Canada's treatment of Aboriginal peoples as better than other countries is most prevalent in the Prairie provinces (43%). Toronto residents are most likely to say that Canada does a worse job than other countries (12%).

Canada's treatment of Aboriginal peoples compared to other countries

1990 - 2010



PRIORITY ISSUES FOR ABORIGINAL PEOPLES. What priority do Canadians place on resolving issues currently facing Aboriginal peoples in this country today? Among five areas presented, the public is most likely to place strong importance on improving the social and living conditions on reserves (57% very important), followed by achieving more economic development (44%), improving the social and living conditions of native people in cities (40%), and settling land claims (37%). One in four (25%) say it is very important to make progress in moving Aboriginal peoples towards self-government.

The relative ordering of the five areas is essentially the same since 1993, except in 1993 and 1997 when settling land claims was at the top of the list. Since 2005, the proportion identifying each of the five areas as "very important" has declined (by 4 to 10 points). Across the five areas, resolution is most widely emphasized as very important by Torontonians, and least so by residents of the Prairie provinces.

Priority on addressing Aboriginal issues

Very important 1993 - 2010

	1993	1997	2003	2005	2010
Improving living/social conditions on reserves	41	33	50	62	57
More economic development	36	31	40	54	44
Improving social conditions for native people in cities	27	20	32	47	40
Settling native land claims	44	41	29	41	37
Moving toward self-government	28	24	24	29	25

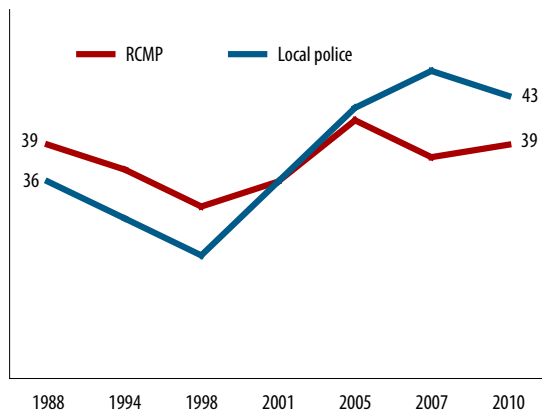
Crime and Justice

CONFIDENCE IN POLICING. Public confidence in the country’s policing has held remarkably steady over the past five years, despite considerable media attention on problems at the national level and in some local areas. Nine in ten say they have a lot of confidence (43%) or some confidence (45%) in *their local police force*, with strong confidence down only slightly from the peak level recorded in 2007 (when 45% expressed a lot of confidence). Strong confidence in local policing is most widespread in Saskatchewan and Alberta, and least so in Quebec and Manitoba (confidence also increases with age). Since 2007, confidence levels are up in Alberta and down in Ontario.

Public confidence in *the RCMP* is also stable, despite recent controversies (e.g., taser death in the Vancouver airport, management conflicts). More than eight in ten Canadians have a lot of (39%) or some (45%) confidence in the RCMP, essentially unchanged from 2007 and just below the peak recorded in 2005. Confidence in the RCMP is strongest in Saskatchewan, Alberta and Atlantic Canada, and lowest in Manitoba, B.C. and Quebec. Since 2007, ratings are up in Alberta and down in Atlantic Canada.

Confidence in RCMP and local police

A lot of confidence 1988 - 2010

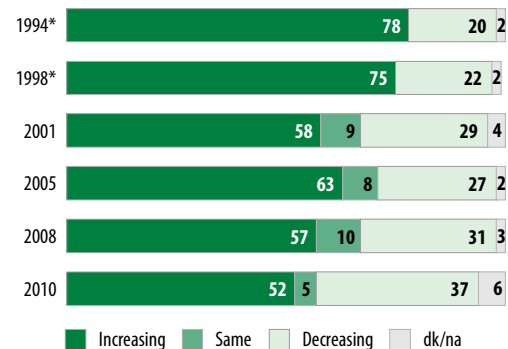


TRENDS IN CRIME. Government and police statistics have documented a continuing decline in crime rates over the past two decades, and public opinion is increasingly reflecting this reality. As in the past, Canadians are more likely than not to assume crime rates are on the rise (a typical reaction to extensive media coverage). However, in 2010 this view is now the lowest it has been since Focus Canada tracking began in 1994; half (52%) now believe that crime rates are actually getting worse, down five points from 2008 and well below levels recorded in the 1990s. A growing proportion say that crime rates in Canada are decreasing (up 6), while another five percent insist that crime rates remain stable (down 5).

This latest trend is evident across the population, but most significantly in B.C., Quebec and among Canadians under 45 years of age. Belief in rising crime rates is most widespread among residents of the Prairies, as well as among Canadians in the lowest income bracket.

Crime rates – real increase or media hype?

1994 - 2010

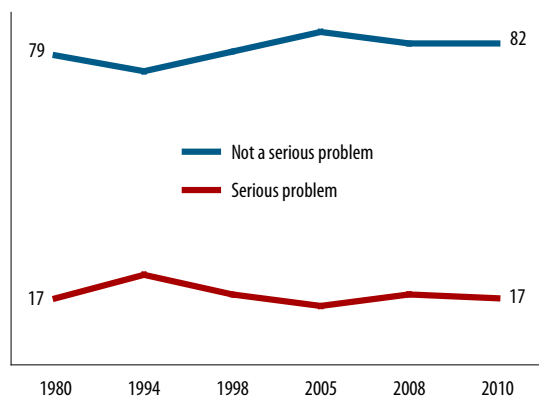


* Slightly different question wording: “staying the same” was not an option

NEIGHBOURHOOD CRIME. Despite the majority view that crime rates are rising, this is not being experienced at the local level. As before, fewer than one in five (17%) Canadians say there is a serious crime problem in their neighbourhood (down 1 point from 2008) and the same proportion reported 30 years ago. Across the country, perceptions of serious local crime have increased in Atlantic Canada (to 24%, up 8), and declined by half in Manitoba (17% down 17) and Saskatchewan (16%, down 16).

Neighbourhood crime

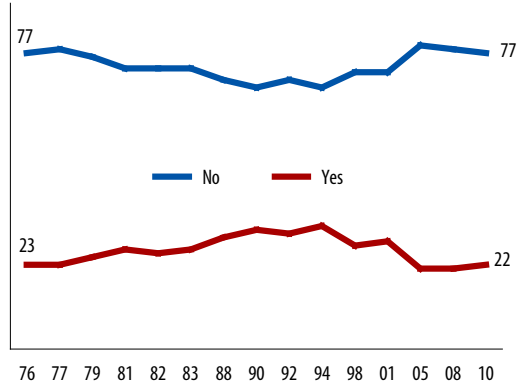
1980 - 2010



Similarly, one in five (22%) say they are sometimes afraid to walk in their own neighbourhood at night (essentially unchanged since 2005, and below levels dating back to 1976). Since 2008, such fear has increased somewhat in Atlantic Canada and among Canadians 45 and older, while declining among younger cohorts. And as in the past, it is women (33%) rather than men (11%) who are most apt to not feel safe walking at night in their neighbourhood.

Afraid to walk in neighbourhood at night

1976 - 2010



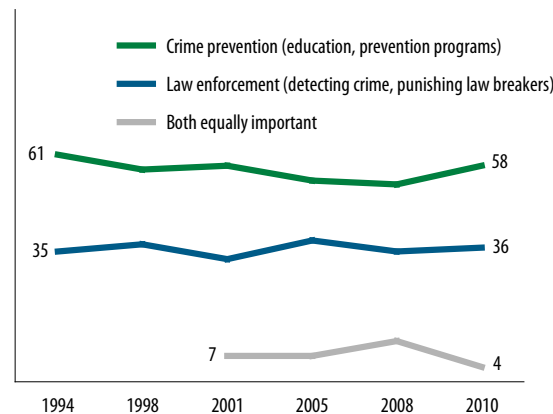
CRIME PREVENTION VERSUS LAW ENFORCEMENT.

In terms of how governments are expected to fight crime, Canadians continue to place greater confidence in crime prevention strategies (e.g., education) (58%) than in law enforcement (detecting crime and punishing lawbreakers) (36%), reflecting a remarkably stable perspective since the early 1990s.

Since 2008, there has been a modest strengthening in the emphasis on prevention (up 5 points), most notably in Quebec and among Canadians with the lowest incomes and education. The opposite trend is evident in Manitoba and Atlantic Canada (to a lesser degree). Prevention is most widely endorsed in Quebec and among Canadians 18 to 29, while enforcement is slightly preferred by those living in the Prairie provinces, where residents are divided between enforcement and prevention.

Government emphasis on crime and justice

1994 - 2010

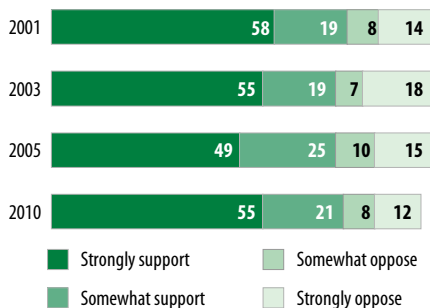


FIREARM REGULATIONS. The federal government's firearms legislation establishing a gun registry and new requirements for gun owners has proven politically controversial, but has been supported by a majority of Canadians. Public support for federal gun regulations declined somewhat over the 2001 to 2005 period, but has since strengthened. In 2010, three-quarters of Canadians say they strongly (55%) or somewhat (21%) support this initiative, compared with one in five (20%) who oppose it.

Since 2005, strong support has increased by six percentage points, while opposition has declined by five points. This trend is evident across most of the country, but most noticeably in Quebec and among residents of medium-sized cities (and overall support is up significantly in Alberta). Firearm regulations receive majority support in every identifiable group, but most widely in Quebec (85%), and least so in Saskatchewan (51%).

Support for federal gun regulations

2001 - 2010

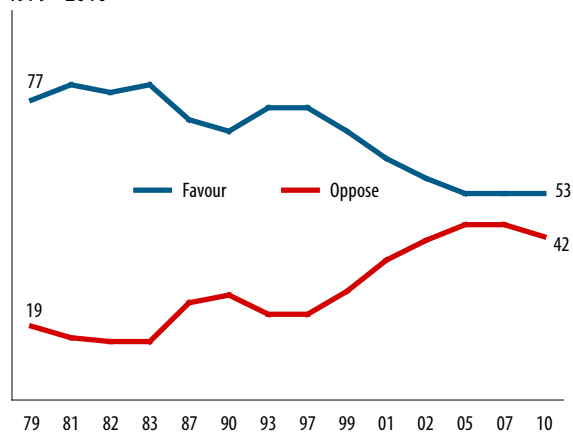


CAPITAL PUNISHMENT. Capital punishment has not been used in Canada in almost 50 years and it is not an issue on today's public agenda, and yet it continues to retain public support. Just over half (53%) of Canadians favour capital punishment for some crimes, compared with 42 percent who oppose it under any circumstances. These results are unchanged since 2005, and reflect a more divided public than was the case in the 1980s and 1990s when capital punishment was more widely supported.

Since 2007, support has increased marginally in western and rural Canada and among Canadians 60 plus, while declining slightly in central and eastern regions. Quebecers are least apt to favour capital punishment for certain crimes (43%), while support is strongest in Saskatchewan (63%) and rural areas (64%).

Capital punishment for certain crimes

1979 - 2010



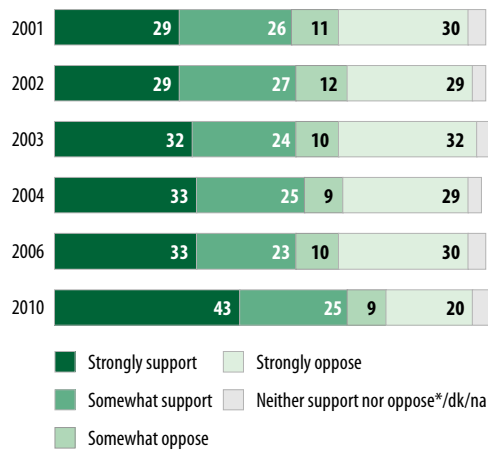
Social Issues

SAME-SEX MARRIAGE. Five years ago, Parliament passed a landmark law legalizing same-sex marriage. Public opinion at the time was evenly divided, but since then has shifted decisively in favour of the change. Seven in ten Canadians now strongly (43%) or somewhat (25%) support same-sex marriage, compared with three in ten (29%) who oppose it. Since 2006, the notable shift has been from strongly oppose (down 10 points) to strongly support (up 10).

This trend is evident across almost all regions and demographic strata except Toronto residents and allophones (the latter being the most strongly opposed of all groups – 47% strongly opposed). Strengthening support for same-sex marriage is most evident in Atlantic Canada and Quebec, and among Canadians under 45 years of age.

Support for same-sex marriage

2001 - 2010

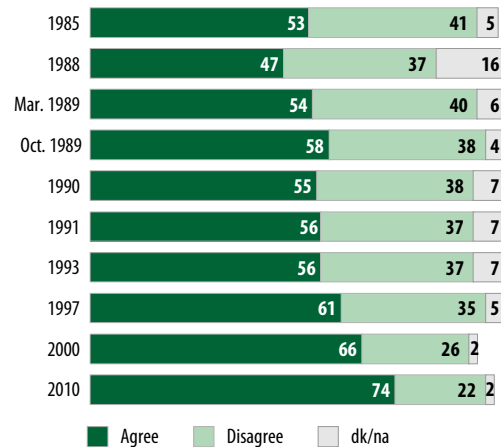


ABORTION RIGHTS. Abortion is another controversial topic that has long split Canadians. Public support for women’s abortion rights has been strengthening since 1993, and three-quarters of Canadians now strongly (51%) or somewhat (23%) agree with the statement “Every woman who wants to have an abortion should be able to have one,” compared with one in five who somewhat (8%) or strongly (14%) disagree.

Support for abortion rights is up in most groups, notably among Quebecers and Albertans, while essentially stable in Manitoba, among low-income Canadians and residents of rural regions. Strong support for such rights is most widespread among francophones (62% strongly agree with the statement), while opposition is most apparent in Saskatchewan (43% disagree).

Every woman who wants to have an abortion should be able to have one

1985 - 2010



Canada's Role in the World

GLOBAL ISSUES. What do Canadians consider the most pressing issue facing the world today (unprompted)? In 2010, no one issue dominates public attention, with equal focus placed on starvation, world hunger or poverty (16%), environment, pollution or global warming (16%), war/lack of peace (14%) and economic conditions/recession/unemployment (14%). Other issues less widely identified include terrorism (6%), social or moral decline (5%), overpopulation (3%) and crime (3%). Canadians' views on this question are largely consistent across the population.

The latest results reflect a significant shift since early 2008, when the top global issue for Canadians was the environment (26%), and economic conditions was considerably lower (5%). Also more salient two years ago were high gas/fuel prices and food prices/scarcity.

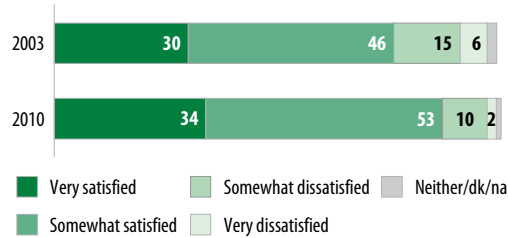
Most important global issue 1993 - 2010

	1993	1995	2000	2002	2004	2006	2008	2010
Environment/pollution	10	8	11	5	7	17	26	16
Starvation/world hunger/poverty	19	16	31	11	14	16	17	16
War/lack of peace	23	24	14	37	28	20	13	14
Economy/recession/unemployment	27	22	5	5	5	3	5	14
Terrorism	–	–	–	20	15	17	3	6

CANADA'S LEADERSHIP IN WORLD AFFAIRS. Most Canadians feel positive about their country's role in the world today, and this view has strengthened over the past few years. Almost nine in ten say they are very (34%) or somewhat (53%) satisfied with Canada's place in the world, up 11 points from 2003; compared with one in ten (12%) who are dissatisfied.

Opinions are similar across the country, with strong satisfaction most evident in Saskatchewan and Alberta, and among Canadians aged 45 plus. Dissatisfaction with Canada's place in the world is marginally higher in Quebec, among Canadians under 45 years of age, and those with a college or university degree.

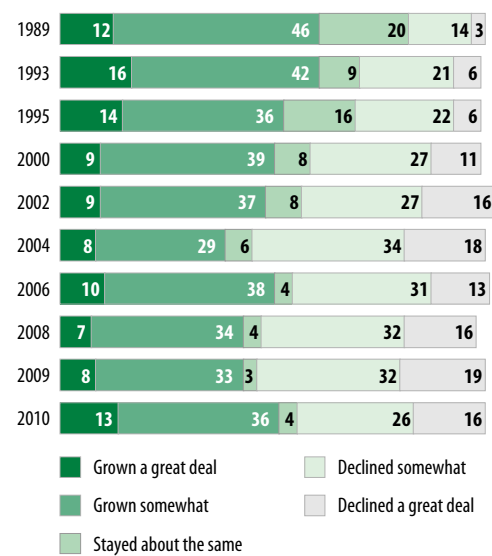
Satisfaction with Canada's place in the world 2003 - 2010



The public's positive view of Canada's role is rooted in part in the belief that Canada is demonstrating leadership on important world issues, and this sentiment has strengthened over the past couple of years. Half (49%) now believe that Canada's leadership in world affairs has grown over the past 10 years, up eight points from 2009. Fewer now say that the country's role has declined (42%, down 9).

This recent trend has taken place across the country, but especially in Ontario, Atlantic Canada and the Prairie provinces, where residents are now the most positive about the country's growing leadership (64%); in contrast, three in ten (28%) Quebecers share this view. Belief that Canada's leadership has declined a great deal is most evident in Montreal, and among Canadians with the most education and income.

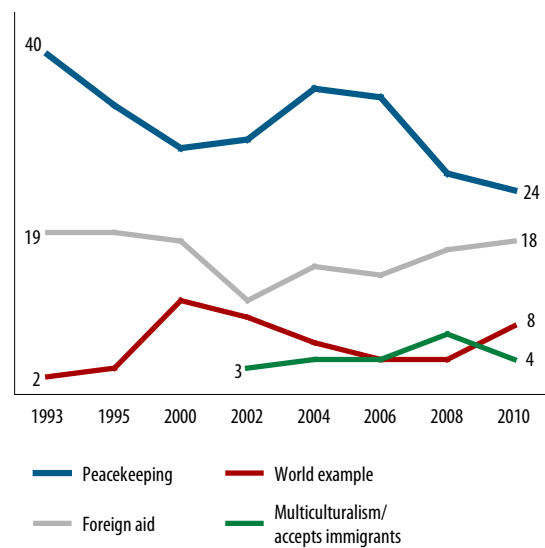
Canada's leadership in world affairs 1989 - 2010



CANADA'S CONTRIBUTION TO THE WORLD. In what areas is Canada seen as making a positive difference in the world today? As in the past, what comes first to mind for Canadians is peacekeeping (24%), although this response continues to gradually diminish over time (in 1993, it was identified by 40% of Canadians). Other contributions include foreign aid (18%), being an example to other countries (8%), support for human rights and democracy (4%), multiculturalism or accepting immigrants (4%) and being the voice of moderation/neutrality (4%) – the emphasis given to these aspects are largely unchanged from 2008.

Opinions are similar across the country, but peacekeeping is most prominent in Ontario, while in Quebec the greatest emphasis is placed on foreign aid.

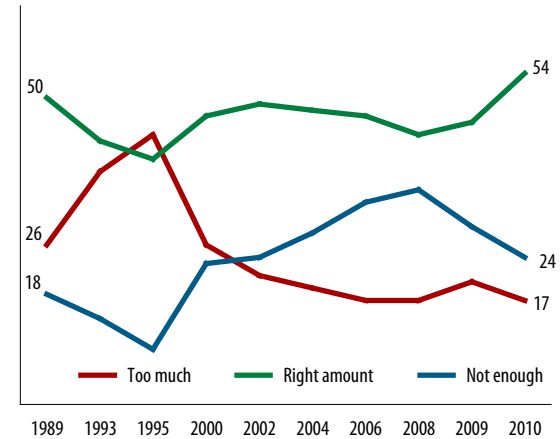
Canada's most positive contribution to the world
1993 - 2010



FOREIGN AID. Given Canadians' views about Canada's leadership position in the world, how do they feel about the amount of financial assistance to poor countries around the world? The public is more likely than not to be comfortable with the level of aid currently being provided, and since 2009 have become more so. Over half (54%) consider the level of spending to be about right (up 8 points from 2009). The proportion who believe the amount of foreign aid is not enough has declined (24%, down 5), while one in six (17%, down 3) continue to maintain that Canada is spending too much.

This trend is evident across the country, but primarily in B.C. and Alberta, where since 2009 there has been a significant shift from spending too little to spending the right amount. It is residents of Saskatchewan, Canadians aged 45 plus and those without a high school diploma who are most likely to feel Canada spends too much on foreign aid, while the opposite viewpoint is most evident in Toronto, among those aged 18 to 29 and Canadians with a university degree.

Canada's spending on foreign assistance
1989 - 2010

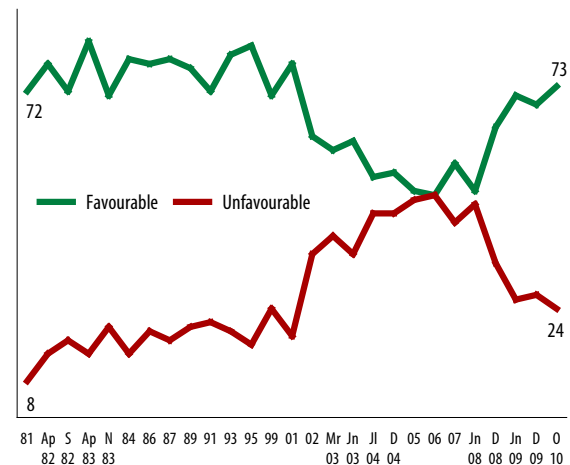


OPINIONS OF THE U.S.A. The 2008 U.S. presidential election marked a significant turning point in Canadians' general opinion of the U.S.A., and Barack Obama has consistently been more popular in this country than his own. This is reflected in the latest trend data showing that three-quarters (73%) of Canadians now have a favourable opinion of the U.S., up four points from December 2009 and now at its highest point since the mid-1990s. This sentiment is largely the same across the country, but strongest among Canadians aged 45 plus, and among those with lower education and higher incomes. Over the past year, opinions have improved most noticeably among residents of Quebec and B.C., and Canadians aged 60 plus.

Those who currently hold a negative opinion of the U.S.A. offer a number of reasons for this view. In 2010, the predominant basis for negative opinions is what is seen as U.S. arrogance and superiority (26%), followed by U.S. foreign policy generally (15%) – the wars in Iraq and Afghanistan in particular (11%) – unfair economic/trade policies (12%) and domestic/social policies (11%). In June 2009, the predominant basis for negative opinions was American foreign policy (18%) and trade policy (15%), with the proportion criticizing the Obama administration increasing marginally (5%, up 2 points). During the Bush administration, Canadians' predominant criticism of the U.S.A. centred around U.S. foreign policy generally, and the war in Iraq in particular.

The dramatic change in Canadian public opinion of the U.S.A. has not appeared to have much effect on Canadians' view on whether their country is becoming more or less like the U.S. over time. A plurality (45%) now see no change in the similarities between the two countries over the past 10 years (up 4 points from 2006), while a slightly smaller proportion (41%, down 1) feel Canada is becoming more like the U.S. One in ten (11%) maintain the trend is in the opposite direction, but this proportion has been gradually declining since 2004. Opinions are similar across the country, with the decline in becoming more like the U.S. most evident among rural residents. and those with the least education and income (and actually increasing slightly among those with a university degree). Canadians aged 18 to 29 are among those most likely to think the two countries are growing more similar.

Overall opinion of the United States 1981 - 2010



Reasons for unfavourable opinions of the U.S.

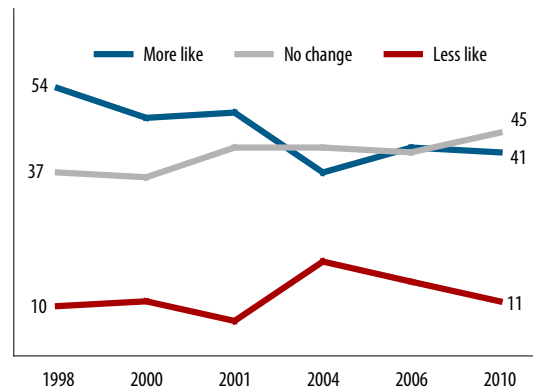
Top mentions 2006 - 2010

	2006	2008	2009	2010
Attitude/arrogance/superiority	5	5	6	26
American foreign policy	33	33	18	15
Unfair trade/economic policies	4	5	15	12
War in Iraq/Afghanistan	13	13	8	11
Domestic/social policies	—	—	—	11
Bush./Obama administration	32	27	3	5
American culture/impact on world	6	11	8	5
American people	4	3	3	4
Too much influence on Canada	3	4	4	4

Subsample: Those who have an unfavourable opinion of the U.S.

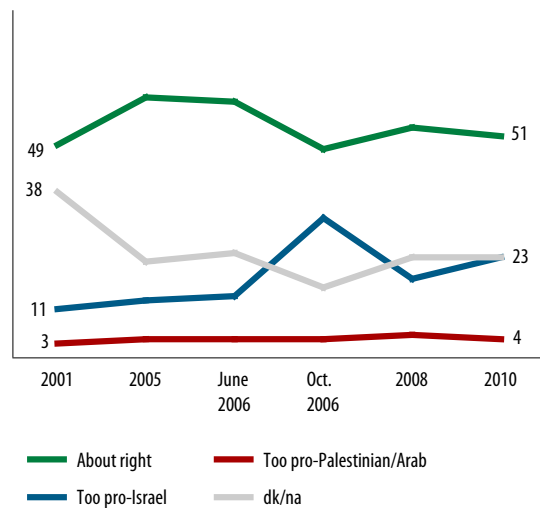
Canada becoming more or less like U.S.?

1998 - 2010



CANADA'S MIDDLE EAST POLICY. Canadians' view of the federal government's foreign policy in the Middle East has shifted marginally over the past two years. Half (51%) continue to believe current policy strikes the right balance (down 2 points from 2008), with an increasing minority (23%, up 5) saying the government is now too pro-Israel (likely reflecting the current government's public expressions of support for Israel). As before, very few (4%) believe the government is too pro-Palestinian or Arab, while one in four (23%) continue to have no clear opinion on this issue.

Canada's Middle East policy 2001 - 2010



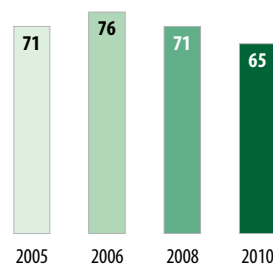
This modest shift in seeing the policy as too pro-Israel is evident across the country except in Manitoba and Saskatchewan (where opinion shifted to seeing the right balance). This view of Canadian policy being too pro-Israel is most pronounced among Quebecers and Canadians with a university education, while least so in Atlantic Canada and the Prairie provinces. Despite this latest trend, Canadians are much more likely to see government policy as balanced than they did during the 2006 conflict between Israel and Hezbollah in Lebanon.

In keeping with the Canadians' generally rosy view about their country's leadership on world issues, a majority continue to believe that Canada can play a constructive role in promoting peace in the Middle East, although this majority is down from 2008. Two-thirds (65%) believe Canada can play such a role, compared with 71 percent in 2008 and 76 percent in 2006.

Such optimism has tracked downward across the country, but most notably in Saskatchewan and among older Canadians. Atlantic Canadians and Manitobans are now most confident in Canada's Middle East role, while this view is least apt to be shared in Quebec and Saskatchewan.

Canada can play a role in promoting Middle East peace

2005 - 2010

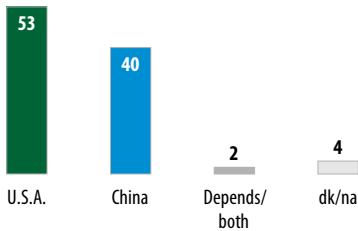


OPINIONS OF CHINA. How do Canadians view China, which is the next emerging superpower and factory to the world? Public opinion is decidedly mixed; half say their opinion of China is very (7%) or somewhat (41%) favourable, while four in ten are somewhat (31%) or very (10%) unfavourable (the remaining 12% are unable to say either way). Canadians' opinions of China have declined moderately since 2005 when 58 percent expressed a positive view.

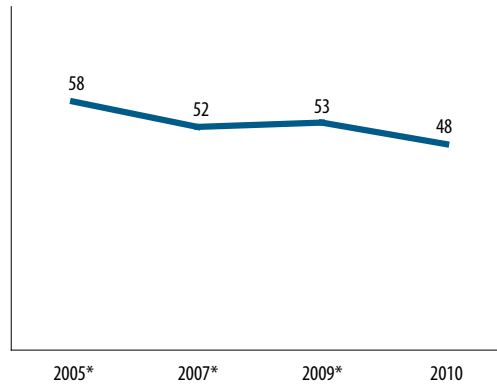
Opinions are similarly split across most of the country, with somewhat more positive views among allophones, men and Canadians aged 18 to 29, and less positive among British Columbians. Internationally, Canadians' opinions about China are in the middle of the pack, well below the very positive sentiments expressed in such countries as Kenya, Pakistan, Nigeria and Russia, and similar to opinions held in the U.S.A., Spain and Britain.

Which superpower will prove to be more important to Canada over the next 10 years? Public opinion is divided, but Canadians are more likely to believe it is the U.S.A. (53%) rather than China (40%). The emphasis on China is most evident among Quebecers and Canadians aged 18 to 29, while U.S.A. backers are most apt to live in Atlantic Canada and Manitoba.

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

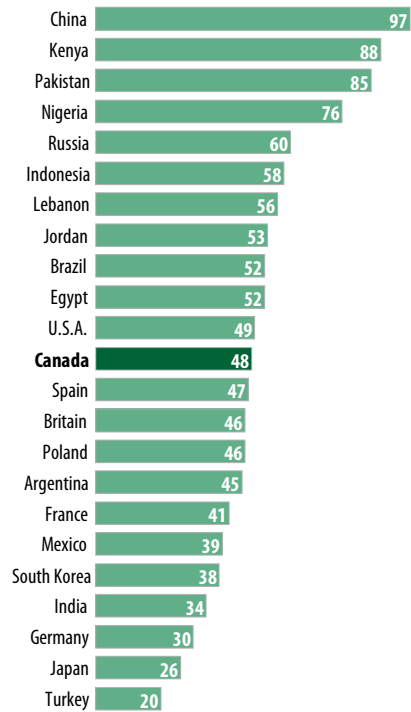


Favourable opinion of China 2005 - 2010



* Source: Pew Research Center

Favourable opinion of China International



Note: International data from Pew Research Center



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