



Focus Canada 2011

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



The Environics Institute

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

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

The Institute pursues this mission by:

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

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

Summaries of Institute projects can be found at www.environicsinstitute.org.

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Introduction

Why public opinion matters

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 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 matters of 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 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.

In Canada, thoughtful and sustained public interest research has been diminishing. Governments at the federal and provincial levels were once major sponsors of syndicated public affairs research, but this type of investment has declined significantly 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 in Canada today is credible, independent and thoughtful public opinion research in the public domain that illuminates rather than sensationalizes or promotes partisan or ideological interests. Also missing is research that is conducted and presented in the context of historical Canadian polling trends and international comparisons.

Focus Canada research program

To address this gap, the Environics Institute in 2010 launched a new public opinion research program to build upon the syndicated Focus Canada research conducted by the Environics Research Group for more than three decades (1976 – 2009). The purpose of this 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 Focus Canada 2010 survey was conducted in fall 2010, and publicly released in February 2011. A copy of the full report is available at:

www.environicsinstitute.org/research-focuscanada2010.html

Focus Canada 2011 survey

The second annual Focus Canada survey was conducted in fall 2011 to take the pulse of Canadians on a wide range of relevant policy areas and issues facing the country, updating key trends and exploring new issues such as public sector unions, the effectiveness of governments and the role of religion in the lives of Canadians today.

The Institute assembled an Advisory Group of the following recognized experts in public opinion and public policy, to provide input and counsel on the design and interpretation of the 2011 Focus Canada research:

- Keith Banting, Queen's Research Chair, School of Policy Studies, Queen's University
- Mel Cappe, University of Toronto, Past-president, Institute for Research in Public Policy (IRPP)
- Antonia Maioni, Department of Political Science, McGill University
- Scott Matthews, Queen's University, Director of the Canadian Opinion Research Archive
- John Richards, Public Policy Program, Simon Fraser University
- David Zussman, Jarislowsky Chair in Public Sector Management, University of Ottawa

This year's survey received sponsorship support from the Canadian Opinion Research Archive (CORA) and the S-Vox Foundation.

The 2011 survey was conducted by Environics Research and was based on telephone interviews with a representative sample of 1,500 Canadians (aged 18 and over) between November 21 and December 14, 2011. The survey sample is stratified to ensure coverage of all 10 provinces, and is representative of the population by age cohort, gender and community size. The results from a survey of this size drawn from the population would be expected to produce results accurate to within plus or minus 2.5 percentage points, in 95 out of 100 samples (the margin of sampling error will be larger for specific subgroups of the population).

The following sections present the results of this survey, with a focus on national results and how opinions have changed (or not) over time. Previous Canadian data is drawn from Environics' Focus Canada research. Current U.S. findings come from two sources: a) an Environics Institute commissioned survey conducted January 19 – 22, 2012 by telephone with 1,000 Americans; and b) selected U.S.-sponsored surveys from such sources as the Pew Research Center, the Gallup Organization and the *Washington Post*.

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

Executive Summary

The year 2011 stands out more for uncertainty and turmoil than stability. The aftershocks of the 2008 global financial meltdown continue to be felt in many countries (especially in the EU), and the Arab world now struggles with the promise and uncertainty of its citizen revolts. Canada, by comparison, has enjoyed a much quieter year. The 2011 Federal Election yielded an historic political re-alignment, but also the re-election of incumbent governments in eight provinces and territories. The Canadian economy remains in better shape than most, but recovery and job creation remain sluggish and governments at all levels are struggling to balance their books.

Within this context, Canadians stand out as among the most upbeat citizens worldwide. They recognize their economy is not growing as in past times, but most remain confident about their own financial security. The country elected its first Conservative majority government in 23 years, but the public's brand of conservatism is for the most part of the progressive variety (in sharp contrast to the US version). A strong majority maintain that taxes are fundamentally good in terms of what they help pay for (although this does not mean they will readily accept increases even for something as important as health care). Canadians continue to be comfortable with the country's high level of immigration and growing diversity, and the level of personal contact with people of different ethnic backgrounds is at an all-time high. Concerns about the crime rate have declined to an all-time low, although this doesn't preclude public support for tougher laws on criminals who break the law.

This is not to say that Canadians feel all is well. Public opinion is in line with the core message of the Occupy Movement in seeing an historic and growing gap between the wealthy and everyone else, and Canadians expect governments to do something about it. More broadly, Canadians continue to look to their governments as a force of good, especially in comparison with their American cousins. But overall confidence in government is down a bit from last year, and it is clear there is no longer a public consensus about bigger government being better government.

The tone of federal politics has grown increasingly divisive in recent years, but unlike the U.S. experience, this has not resulted in a growing partisan divide in Canadian public opinion. Supporters of the various federal parties do not fully agree on many of the important issues of the day, but the similarities continue to stand out more than the differences: NDP supporters are still more likely than not to support the government's new crime bill and policy balance in the Middle East, while a majority of Conservative supporters think crime prevention is better than enforcement, and consider taxes to be fundamentally a good thing.

The following are key highlights from the research:

Economy and standard of living

- Canadians are more positive (58%) than negative (36%) about the direction of their country today, and this sentiment has strengthened over the past year. Canadians remain among the most upbeat among citizens of 23 nations, ranking third behind only China and Egypt, and well ahead of the British (32%), French (25%), and Americans (21%; who have grown more negative about where their country is heading).
- Top-of-mind, Canadians increasingly identify the economy and jobs as the most important issue facing the country today, reflecting reduced confidence in the national economy over the past year (with confidence levels now at their lowest point since April 2009, early in the recovery from the global financial meltdown). This trend is most evident in all regions, but most noticeably in Ontario and B.C.
- At the same time, Canadians are not losing confidence in their ability to buy the things they need and want, and are notably upbeat about their personal financial outlook over the coming year. Close to half believe their finances will improve in 2012, compared with three in ten who expect them to get worse. Optimism is strongest in Quebec and the Prairies, and among youth.

- The public is more likely than not to feel the country's tax system is unfair to the average taxpayer, and this sentiment has strengthened marginally over the past year. At the same time, Canadians continue to believe that, fundamentally, taxes are positive rather than negative, and this perspective has gained modest strength since 2010 (most noticeably in B.C. and Ontario, reversing a downward trend likely resulting from the introduction of a new HST).
- Two-thirds of Canadians believe the income gap between the wealthy one percent in this country and everyone else is larger than it has ever been historically, in most cases because of structural inequities in the way capitalism works, government and tax policies, and other disparities (e.g., regional). The public tends to think this country's income gap is smaller than the one in the USA and developing countries such as India and China, but about the same as that in European countries such as Germany and France.
- Income inequality is not widely seen as a major public policy issue in Canada, but a strong majority believe governments should actively find ways to reduce the gap between the wealthy and others less fortunate (with 52% who strongly agree). But this sentiment likely does not extend to clamping down on large corporate profits, which most Canadians do not seem to have a problem with.

Role of government

- Most Canadians express overall satisfaction with their country's system of government, but somewhat less so than in 2010, reversing an upward trend dating back to the 1990s. This latest trend is driven by declining confidence in Quebec but also in Ontario, while satisfaction has increased in the Prairies and B.C. Public confidence in government is notably stronger in Canada (68%) than in the USA (44%).
- While governments and politicians are often criticized for what they do or don't do, most Canadians believe they play an essential role in our society. Majorities say governments are essential to finding solutions to important problems (rather than the source of such problems), and often do a better job than most people

give them credit for. By comparison, Americans are much more divided about the role of government in their country.

- Public confidence in the role of government does not translate into support for expanding its role. Canadians are divided on whether they prefer bigger government providing more services, or smaller governments providing fewer services. This division cuts across most segments of the population, but is an issue that clearly separates federal NDP and Conservative supporters. Americans are similarly divided, but more apt to favour smaller government with fewer services.

Political engagement

- While declining voter turnout is an unmistakable trend across the country, three-quarters of Canadians maintain that voting is worthwhile and that their own vote makes a difference. When asked why *others* no longer vote, the public explains this as either problems with the current political system (e.g., no difference between who is in office, lack of honest politicians, ineffective policies) or a lack of commitment among voters themselves (apathy, busy lives, laziness).
- Voters may also be turning off to what appears to be increasingly partisan politics at all levels of government. Six in ten Canadians would prefer their elected officials to make compromises with people they disagree with, rather than stick to their positions; this view is most widely held in Quebec, among those with higher socio-economic status and supporters of federal progressive parties. Americans, by comparison, are more apt to want their politicians sticking to their positions.

Public sector unions

- Union membership has been declining over the past 30 years, but a majority of Canadians continue to believe unions have too much power for the good of the country. This sentiment has declined somewhat since 1994, continuing a trend dating back to the 1980s. At the same time, an even stronger majority also believe that unions are important and effective institutions, in terms of protecting employees' rights in the workplace and improving working conditions for *all* Canadians.

- Positive views of unions notwithstanding, the public is evenly divided about whether public sector unions should have the right to strike when negotiations with management break down. This division extends across the country, but pro-strike sentiments are more evident in B.C. and Saskatchewan, among younger Canadians, and those who support the federal NDP and Green Party. Anti-strike sentiments are more apparent among top income earners and Conservative supporters.

Immigration and multiculturalism

- Canadians continue to hold largely positive views about the current level of immigration to this country. Most continue to disagree with the view that current immigration levels are too high and that immigrants take away jobs from other Canadians. Eight in ten believe immigration is good for the Canadian economy.
- The arrival of illegitimate refugees has been a public concern since the 1980s, but is becoming gradually less so over time. Just over half of Canadians now agree that many people claiming to be refugees are not real refugees, with this proportion down modestly over the past year, and now close to historically low levels.
- The public's greatest concern about immigration remains centred around newcomers' cultural integration. Two-thirds continue to agree that too many immigrants do not adopt Canadian values, unchanged since 2010, and similar to levels recorded over the past two decades. Concerns about immigrant integration are most apt to be expressed by older and less educated Canadians.
- Canadians' personal contact with individuals from other ethnic groups has increased since 2006, and is now at the highest levels recorded (dating back to the 1980s). Three-quarters report having frequent or occasional contact with others who are Black or Chinese, with smaller majorities reporting such contact with those with South Asian backgrounds and Aboriginal Peoples. In all cases, frequency of contact is higher in urban areas, but the increase since 2006 is mostly in smaller communities.
- Many Canadians take pride in their country's multicultural reality, but there is also widespread belief that ethnic groups experience discrimination on an ongoing basis.

As in 2006, the public is most likely to feel that Muslims experience discrimination (often or sometimes), followed closely by Aboriginal Peoples, South Asians and Blacks. By comparison, members of the Chinese and Jewish communities are less widely seen as experiencing a comparable level of discrimination.

- Another significant minority group consists of the LGBT community. Two-thirds of Canadians say they often or occasionally have contact with individuals who are gay or lesbian, with frequent contact most widespread in Toronto and Montreal, and those under 30. Three-quarters believe that gays and lesbians experience ongoing discrimination, placing them near the top of the list when compared with ethnic groups.

Crime, justice and social issues

- Government and police statistics document declining crime rates, and public opinion continues to match this trend. The view that crime is on the increase in Canada has declined over the past year and is now at its lowest point on record (since 1994). Fewer than half now believe crime rates are on the rise, while an equal proportion say crime is declining.
- Personal experience with crime is holding steady, with seven percent of Canadians reporting having been a victim of a criminal act in the previous six months. This proportion is essentially the same as has been reported over most of the past three decades.
- In terms of how governments are expected to protect their citizens, Canadians increasingly place greater confidence in prevention strategies (e.g., education) than in law enforcement (detecting crime and punishing lawbreakers), now by a two-to-one margin and the largest yet recorded.
- At the same time, many Canadians also see value in tougher laws for those convicted of crime. There is majority public support for the federal government's new omnibus crime bill that would increase jail time for some offences and reduce judges' discretion in sentencing. This legislation attracts majority support across the country, but most widely in Alberta, smaller communities and among allophones.

Canada's role in the world

- Canadians now identify economic issues, top-of-mind, as the most pressing challenge facing the world today. This marks a significant shift from just a year ago when starvation/world hunger, the environment and war/conflict shared the top spot. At the same time, the public is now marginally more optimistic about the direction the world is heading than in early 2008 (prior to the global financial meltdown).
- Peacekeeping continues to be most widely identified as the country's positive contribution to the world, but less so than in 2010, continuing a steady decline since 2004. Other important contributions include foreign aid (also down from 2010), the country's economic system, multiculturalism and generally setting an example for other countries.
- The Canadian population is making an impact on the world independently of government policies and foreign aid. Close to half have donated money to organizations that address issues in other countries (projecting to a total of \$8.4 billion), and one in four have provided financial support to family members and others they know living in another country (totalling \$12.4 billion). In both categories, the participation rate has increased since 2008, although the average dollar contribution is less.
- Canadians' overall impression of the USA has declined sharply over the past year, reversing a positive trend following Barack Obama's election in late 2008. Six in ten now have a favourable impression, now at its lowest point since June 2008 (when Bush was still president). This trend unlikely reflects a declining opinion of the President, as seven in ten would like to see him re-elected in 2012, compared with one in ten who favour the eventual Republican nominee.
- Although opinions of the USA generally are on the decline, Canadians remain largely supportive of closer ties with their neighbour to the south. The public remains more positive than negative about the impact of NAFTA on the Canadian economy, and more than six in ten continue to endorse a common policy on immigration and border controls.

- Despite the federal government's strengthening ties with Israel, Canadians continue to be more likely than not to feel their government's policy in the Middle East is balanced, compared with a modest minority who says it is too pro-Israel, and a tiny proportion who insist it favours the Palestinians. Fewer than half of Canadians hold an opinion about the Palestinians' bid for statehood at the United Nations, but support for this bid outweighs opposition by a three-to-one margin.

Religion in Canada

- Canadians' connection with organized religion continues its gradual decline. Seven in ten report a religious affiliation, now at its lowest point ever (based on Statistics Canada data). Roman Catholics continue to make up the largest single group, followed by mainline Protestants (United, Anglican), conservative/evangelical Protestants and other Christians. Five percent identify with a religion other than Christian, while one in four have no religious beliefs or affiliation.
- Although religious affiliation is declining, it encompasses a majority of the population and its focus on faith is sustaining. Three in ten say they attend services at least once a week and four in ten say religion is a very important part of their life (both up marginally over the past several years). Among all Canadians – religious or not – eight in ten say they believe in God or a universal spirit, including a majority with no affiliation.
- Religion does not appear to be a source of division within Canadian society today. Most Canadians say the friends and family members they spend time with include a mix of religious and non-religious people, with this pattern consistent across denominations and those without an affiliation. As well, more than half believe they share common values on most things with those whose orientation to religion is different from their own, and this is the same among religious and non-religious Canadians.

Economy and Standard of Living

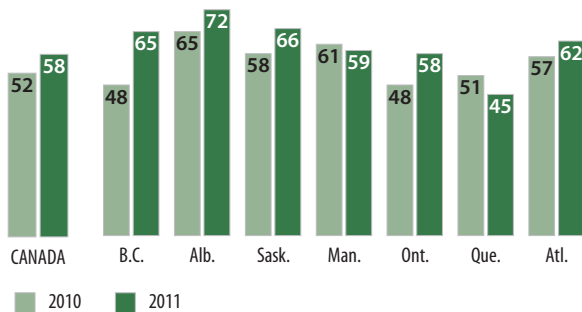
Economy and consumer confidence

DIRECTION OF THE COUNTRY. A clear majority (58%) of Canadians are satisfied with the direction of the country, compared with 36 percent who express dissatisfaction. This perspective continues to stand out in relation to public opinion in most other countries, and has strengthened over the past year (up from 52%).

Rising satisfaction with direction of the country is evident in every region except Quebec (now at 45%, down 6 points), but is up most significantly in British Columbia and Ontario. Albertans continue to be the most positive about the direction of the country (72%) and Quebecers the least so (45%). Across the country, rising satisfaction is also most evident among Canadians with higher levels of education, those aged 18 to 29 or 60 plus, and non-European immigrants.

Satisfaction with the way things are going in the country today

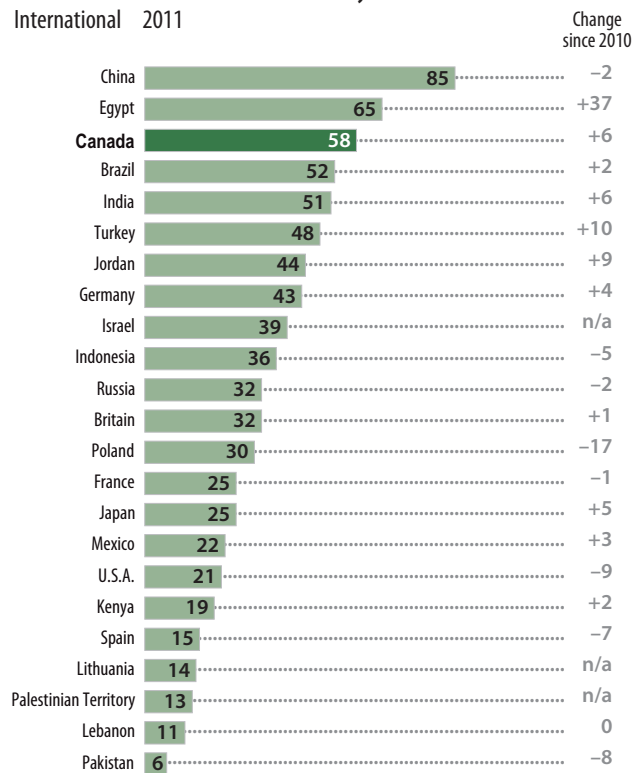
Satisfied By province 2010 - 2011



Internationally (based on a February 2011 Pew Research Center survey), Canadians are now third most positive about the direction of their country among 24 nations, trailing behind China (85%) and Egypt (65%, which has leapt 37 points since last year). Satisfaction levels are significantly lower but stable in Germany (43%), Great Britain (32%) and France (25%).

In contrast, this view is shared by only 21 percent of Americans (down 9 points), comparable to Mexico and just ahead of Kenya. Over the past year, only three countries have shown stronger improvement in satisfaction levels than Canada (Egypt, Turkey and Jordan).

Satisfied with direction of country



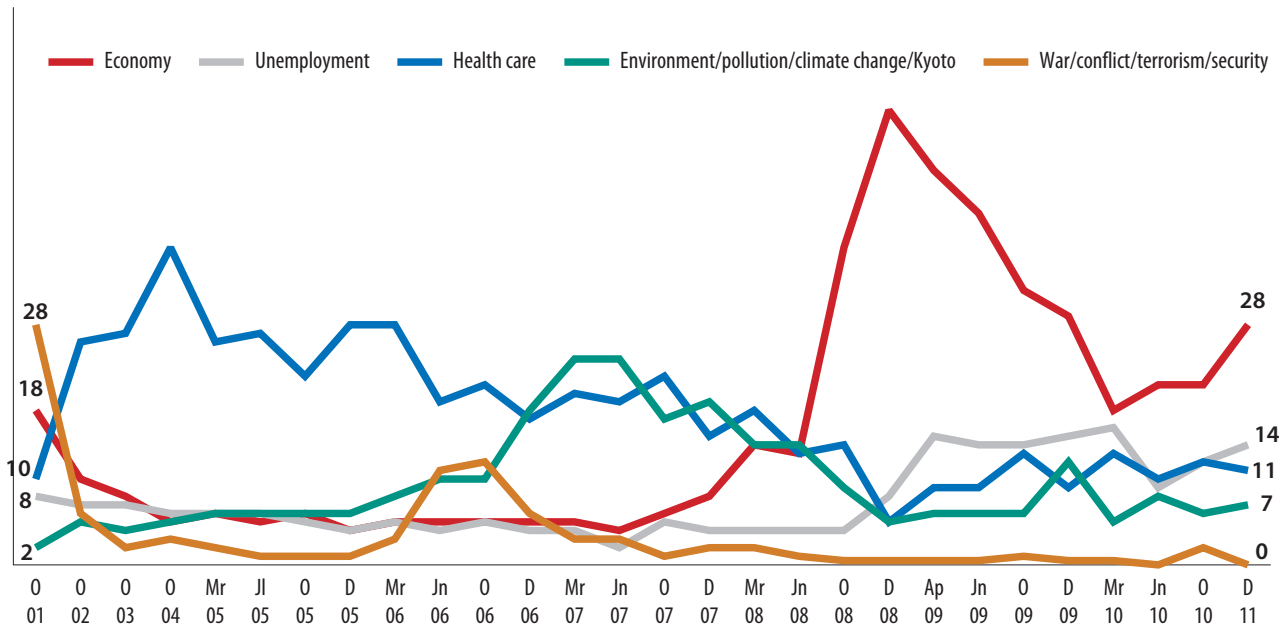
Note: International data from Pew Research Center, Feb. 2011

MOST IMPORTANT ISSUE. Top-of-mind, Canadians increasingly identify the economy and jobs as the most important issue facing the country today (42%, up 9 points from 2010). This accelerates a rising trend dating back to March 2010 but well below the peak recorded in late 2008 when most countries were reeling from the global financial meltdown.

Other issues trailing well behind include health care (11%), poor government leadership (8%), environmental issues (7%) and poverty/homelessness (4%) – all largely unchanged from a year ago.

Focus on the economy and unemployment has increased across the country, but most noticeably in Ontario (54%, up 14 points) and B.C. (48%, up 11), as well as among higher income Canadians, and those aged 60 years and older. This issue gets the least attention in Quebec (26%; where poor government leadership now stands out (15%)), and in Saskatchewan (27%; where environmental issues are now more salient (14%)).

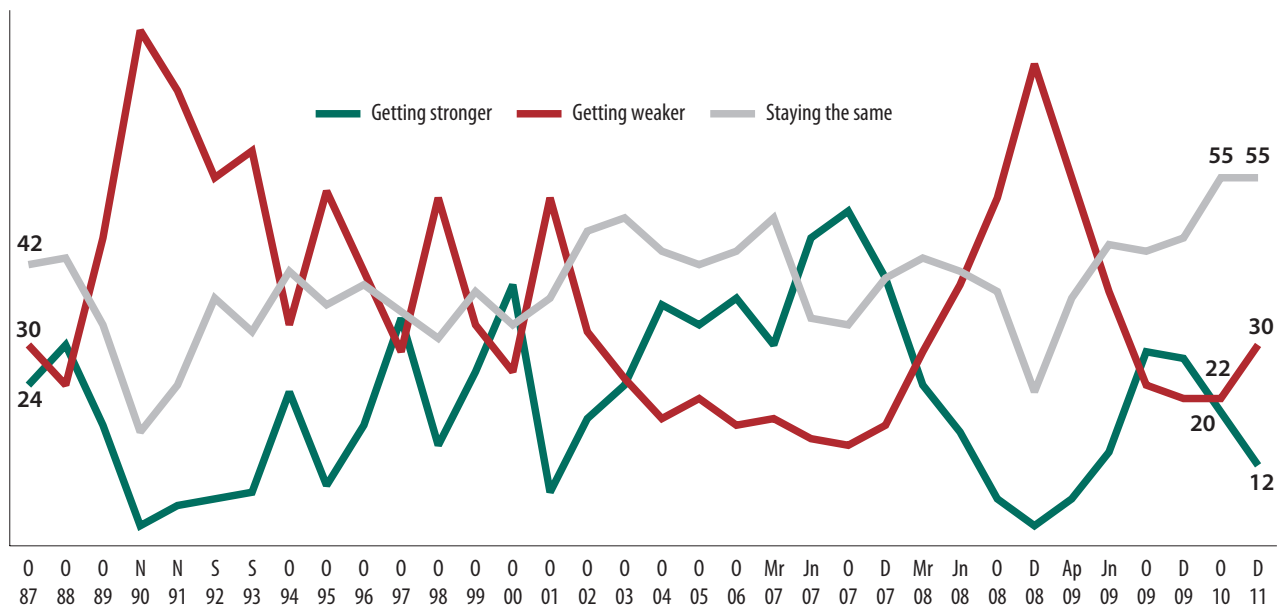
Most important problem facing Canadians today 2001 - 2011



STRENGTH OF THE CANADIAN ECONOMY. With rising uncertainty clouding economic forecasts, the public's confidence in the Canadian economy has declined noticeably over the past year. Only one in ten (12%) now believe the economy is growing stronger (down 8 points since 2010), compared with almost three times as many (30%, up 8) who say it is getting weaker. These numbers are now at their lowest point since April 2009 (early in the recovery from the global financial meltdown).

This downward trend is evident in all provinces, but most noticeably in B.C., Manitoba and Alberta. Opinions about the direction of the national economy continue to be least positive in Quebec (where only 9% say the national economy is improving, versus 39% who say it is getting worse). Bucking this trend are the country's allophones, who are now among the most optimistic (22% say the economy is improving).

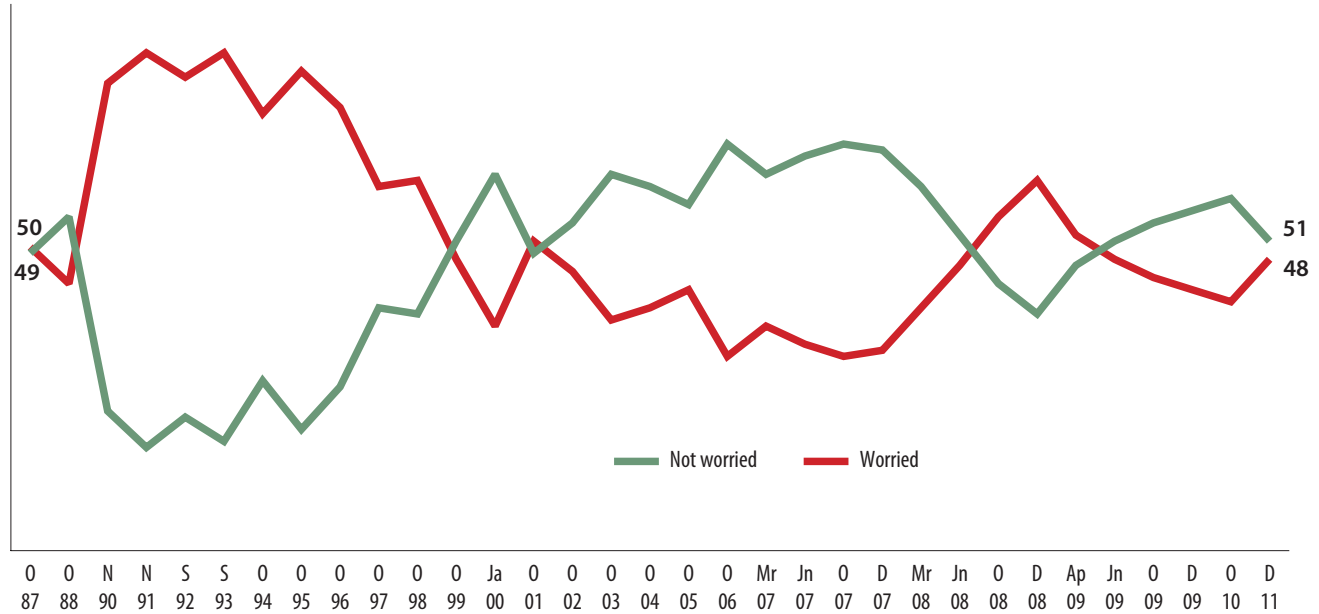
Strength of the Canadian economy
1987 - 2011



Similarly, an increasing proportion of Canadians say they are worried about the overall economic situation in Canada (48%, up 7 points from 2010), reversing a downward trend dating back to April 2009.

This trend is evident in all regions except the Prairies, but is most significant in B.C. (55%, up 16) and now even in Ontario (55%, up 9). Concerns about the economy are higher among Canadians with the least education and income, and those 45 to 59 years of age, but are declining among allophones.

Concern about the Canadian economy
1987 - 2011



CONSUMER CONFIDENCE. Despite growing concerns about the national economy, consumer confidence is holding steady in terms of Canadians' view of conditions for buying the things they need and want. Four in ten (38%) continue to feel that it is a good time, compared with 52 percent who disagree – essentially unchanged from 2010.

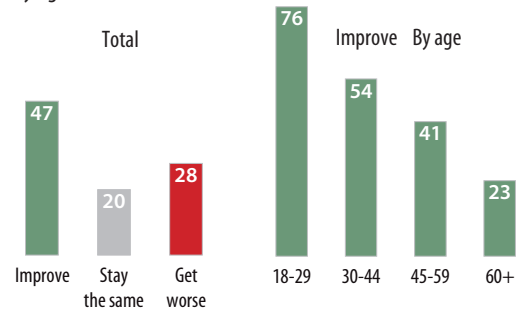
Consumer confidence is now strongest in Manitoba (49%) and Quebec (44%), as well as among men and Canadians with higher socio-economic status. Improving confidence over the past year is most evident among the country's allophones.

Moreover, Canadians are notably positive about their own personal financial outlook over the coming year. Close to half (47%) expect it will improve in 2012, compared with 28 percent who think it will get worse (another 20% don't anticipate any change). Anticipation of improving personal finances is most widespread in Quebec and the Prairies, and most notably among youth.

Such optimism is even more widespread in the U.S. (from a June 2011 Pew Study), with six in ten (62%) Americans who believe their financial situation will improve over the next year (not surprising given how poorly many fared over the past couple of years).

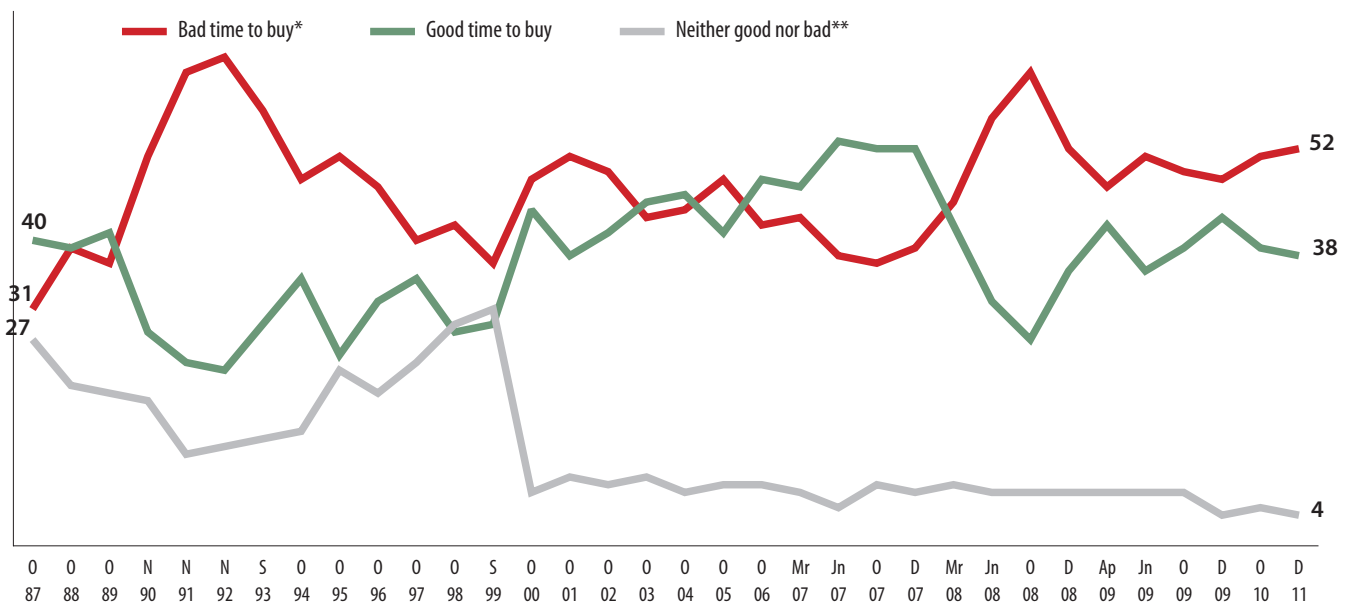
Expectation for personal finances in 2012

By age 2011



Consumer confidence

1987 - 2011



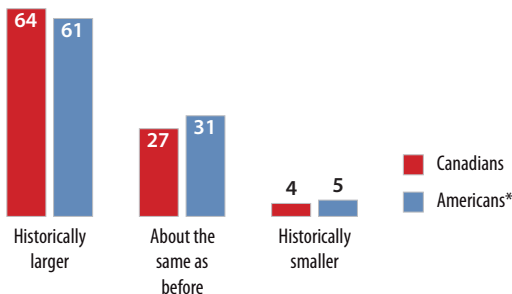
Income inequality in Canada

ARE INCOME DISPARITIES GROWING? Canadians have long been aware of the significant disparities in income between the rich and poor in this country, and Focus Canada surveys over the past two decades have confirmed that most believe this gap has been widening over time (in 2010, 66% said this gap has grown over the past 10 years). In 2011, the question shifted from the gap between rich and poor, to the one separating the wealthy from everyone else (1% versus the other 99%, as articulated by the recent Occupy movement).

The results show that most Canadians believe income disparities in this country are now at record levels. Two-thirds (64%) of Canadians say the gap in the amount of money owned by the wealthy and everyone else in the population is larger historically than it has ever been. One in four (27%) believe this gap is about the same as it has been, while only four percent insist the difference between wealthy and everyone else is now smaller by historical standards.

Views on this question are notably consistent across the population, although belief in a historically large income gap is more widespread among Canadians with a university education, and those who support the federal NDP, Bloc Québécois and Green parties (and least so among those who support the Conservatives). Opinions in Canada are almost identical to those in the U.S., based on a November 2011 *Washington Post* survey (61% historically larger income gap, 31% about the same, 5% smaller).

Gap between wealthy and everyone else 2011



* *Washington Post* survey, Nov. 2011

When those who believe the gap is larger are asked (unprompted) why the income gap in Canada is at record levels. No particular explanations predominate but three-quarters (74%) emphasize structural inequalities of one form or another, notably tax breaks going only to the rich (18%), capitalism helping only the rich (14%), regional and other structural disparities in opportunities (10%), government policies (7%) and fewer middle-class jobs (6%).

A small proportion attributes this gap to basic greed and speculation (7%), while a similar percentage (5%) say wealthy people work harder and earn what they make.

Why is income gap growing?*

Unprompted mentions 2011

Structural inequities	74
Tax breaks go only to the rich/corporations	18
Capitalism hurts poor/helps rich	14
Unequal opportunities/regional disparities	10
Government policies	7
Few middle-class jobs	6
Economic system has changed	5
Globalization/free trade	1
Other	13
Bad economy/more unemployment	11
Greed/speculation	7
Wealthy people work harder/earn it	5
Other reasons	11
dk/na	11

* Among those who say gap is historically larger

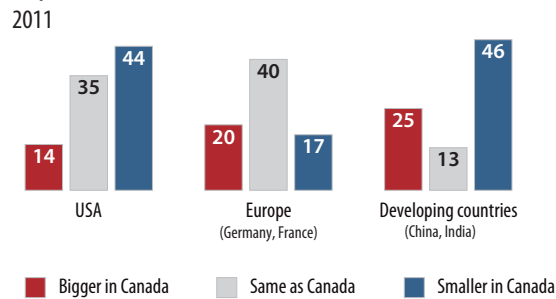
INCOME DISPARITIES IN CANADA VERSUS OTHER COUNTRIES.

While most see a rising gap between the rich and everyone else, Canadians tend to be positive about their country's income disparities relative to other countries, although there is no consensus on these views.

Most believe the gap in Canada is smaller than (44%) or about the same as (35%) the gap in the U.S., and hold similar views about how Canada compares with developing countries such as China and India (46% say gap is smaller in Canada, 13% say about the same).

By comparison, Canada is most apt to be seen as having about the same income disparities as European countries such as Germany and France (40%).

Gap in Canada vs. other countries

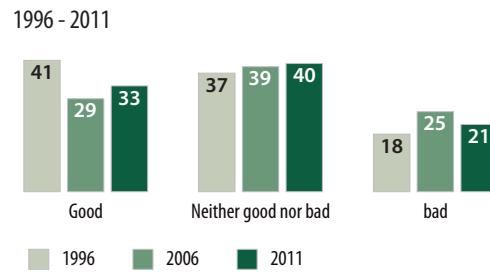


VIEWS ABOUT LARGE CORPORATE PROFITS.

Recent attention to growing income inequality fueled by the Occupy movement does not appear to have influenced Canadian public opinion about large corporate profits. The proportion that say large corporate profits are a bad thing has declined to 21 percent (down 4 points since 2006), reversing a modest upward trend dating back to the mid-1990s. Three-quarters say such profits are either a good thing (33%, up 4), or are neither good nor bad (40%, up 1).

A negative view of corporate profits is in the minority across the country, but is most evident in Atlantic Canada, among older Canadians, those with lower incomes and NDP supporters. A positive view of large corporate profits is most prominent in Quebec, among men, high income earners and Conservative supporters.

General opinion of large corporate profits

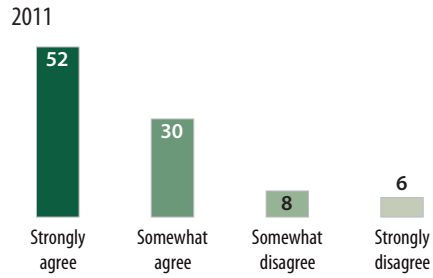


RESPONSIBILITY OF GOVERNMENT TO REDUCE DISPARITIES. Despite an absence of consensus about the state of income disparities in Canada or how it compares with other countries, a large majority strongly (52%) or somewhat (30%) agree that governments in this country should actively find ways to reduce the gap between wealthy people and those less fortunate.

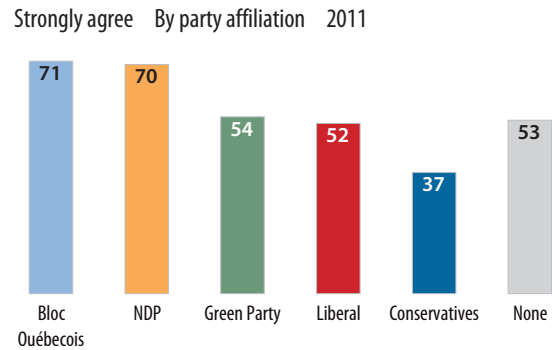
This is the predominant view across the population, but strong agreement is most notable among residents of Atlantic Canada and Quebec, as well as among supporters of the federal NDP (70%) and Bloc Québécois (71%), and much less among those who support the Conservatives (37%).

How do opinions on this question vary across the income spectrum? Strong majorities in all income brackets agree that governments have a responsibility to reduce the gap between the wealthy and others, but Canadians in the top bracket (household incomes of \$100K or more) are less apt to agree strongly (43%) about this issue.

Governments in Canada should actively find ways to reduce the gap between wealthy people and those less fortunate



Governments in Canada should actively find ways to reduce the gap between wealthy people and those less fortunate



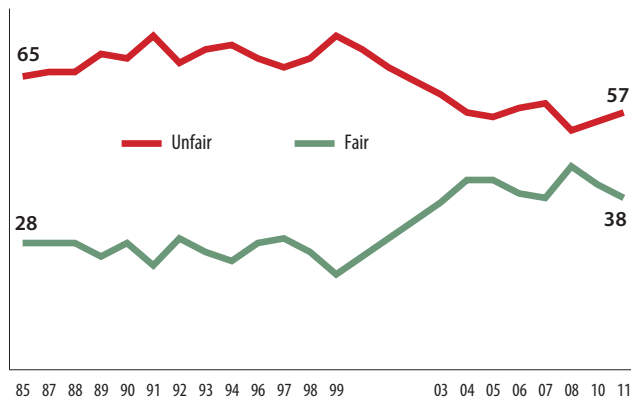
Taxes in Canada

FAIRNESS OF TAX SYSTEM. Taxation has been a political issue in Canada for decades, and is becoming an increasing challenge for governments faced with balancing budgets and rising costs. A diminishing minority (38%) of Canadians feel the country's current tax system is fair to the average taxpayer, declining for the second consecutive year and now at its lowest level since 2007.

The latest trend is not uniform across the country. Belief in tax fairness is down most notably in Atlantic Canada and B.C., but has strengthened in Ontario and Saskatchewan. Overall, residents of eastern Canada are less likely to feel the current tax system is fair, with this view also most evident among francophones and Canadians 45 to 59 years of age. As well, views about tax fairness appear to be one of the key drivers of satisfaction with direction of the country.

Fairness of the tax system

1985 - 2011



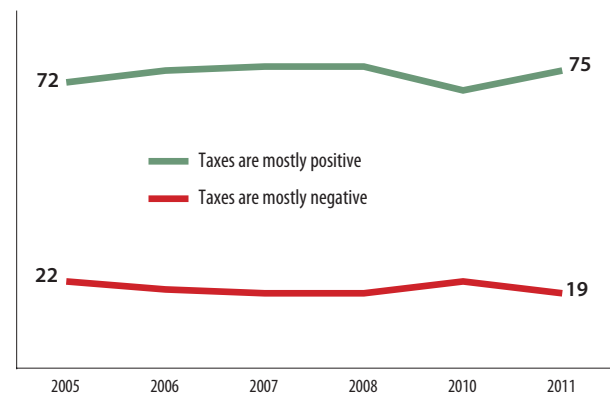
ARE TAXES FUNDAMENTALLY GOOD OR BAD?

Despite such dissatisfaction with the tax system, Canadians continue to believe that, fundamentally, taxes are mostly a positive thing, and this perspective has strengthened marginally over the past year. Three-quarters (75%, up 5 points since 2010) now say taxes are a good thing because they pay for important things that contribute to a positive quality of life, rather than a bad thing (19%, down 3) because they take money out of people's pockets and hold back economic growth.

A positive view of taxes is prevalent across the country and this latest positive shift has taken place in most regions, but most notably in Ontario and B.C. (reversing a previous downward trend likely resulting from the introduction of a new HST). A positive view is most widely held by Albertans (80%), 18- to 29-year-olds (82%), university graduates (80%), non-European immigrants (81%) and Green Party supporters (84%), while least evident among Vancouverites (61%).

Taxes positive or negative?

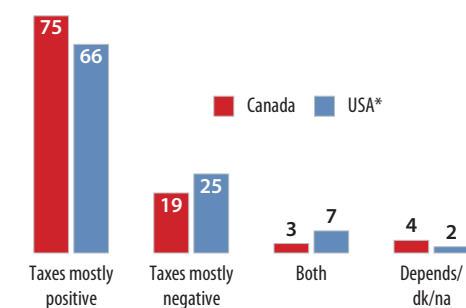
2005 - 2011



Taxes are even more politically toxic in the United States, but Americans surprisingly hold a similar perspective about the overall value of taxes as an important way to finance a positive quality of life. Based on a recently-completed Environics-sponsored survey (using the same survey question), two-thirds (66%) of Americans consider taxes to be mostly a positive thing, compared with 25 percent who say taxes are mostly negative. A positive view of taxes is most widespread among Americans aged 65 and over (73%), and non-whites (76%).

Taxes positive or negative?

Canada and USA 2011

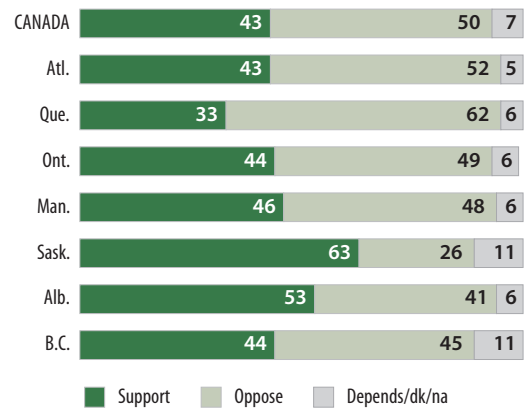


* Environics Institute survey, Jan. 2012

HIGHER TAXES FOR HEALTH CARE. If taxes are seen as essential to a good quality of life, are Canadians prepared to pay higher taxes to maintain or improve an essential public service like their province's health care system? Public opinion is notably divided on this question: 43 percent of Canadians support higher taxes for health care in their province, versus 50 percent who oppose this policy.

Opinions are generally divided across the country, but support for such a tax increase is strongest in Saskatchewan and Alberta, among youth, and those who support the federal Liberals and NDP, while weakest in Quebec.

Tax increases to maintain/improve health care
By province 2011



Government and Politics

Effectiveness of government

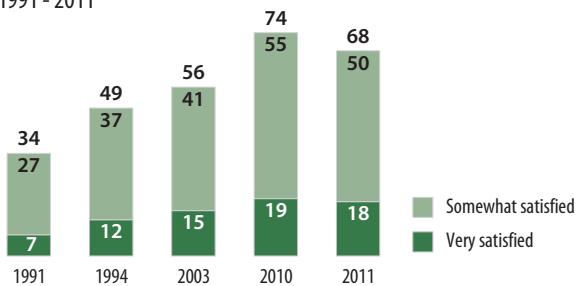
SATISFACTION WITH SYSTEM OF GOVERNMENT.

Governments are constantly under scrutiny – and often attacked for doing too much or too little, and not meeting public expectations. Such dissatisfaction notwithstanding, Canadians are notably positive about their current system of government when broadly defined. Seven in ten (68%) express satisfaction with their country’s system of government, although this proportion has declined modestly over the past year (down 6 points), reversing an upward trend dating back to the early 1990s.

This latest trend is driven primarily by declining confidence in Quebec (down 15 points) and Manitoba (down 16), but also in Ontario (down 8). West of Saskatchewan is a different story, with satisfaction levels in Alberta and B.C. up modestly since 2010. Satisfaction with system of government is now highest in Alberta (80%) and lowest in Quebec (55%).

On the political spectrum, confidence ranges from 82 percent among Conservative supporters to 37 percent among Bloc supporters. Views on this issue are also closely linked to satisfaction with direction of the country today.

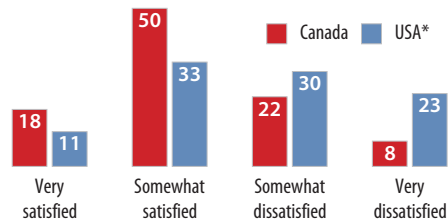
Satisfied with system of government 1991 - 2011



However frustrated Canadians may be with their governments, their confidence is well above that of their neighbours to the south. When the same question was posed to Americans in January 2012, fewer than half say they are very (11%) or somewhat (33%) satisfied with their own system of government, compared with a majority who are somewhat (30%) or very (23%) dissatisfied.

Across the USA, satisfaction is most evident among Americans 18 to 34 years of age, Hispanics and college graduates, and least so among whites and Americans with household incomes of \$35,000 to \$50,000.

Satisfaction with system of government Canada and USA 2011



* Environics Institute survey, Jan. 2012

GOVERNMENTS AS THE SOLUTION OR THE PROBLEM?

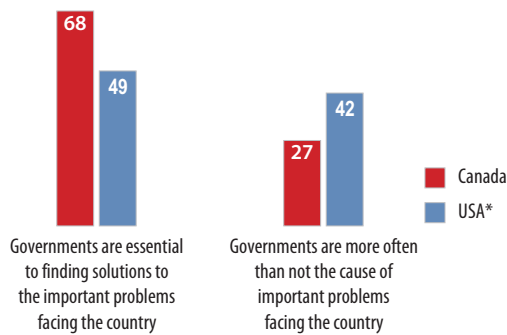
Although criticism of governments (leaders, policies, spending) might lead to the conclusion that Canadians think they are more trouble than they are worth, most in fact believe governments are essential to finding solutions to important problems facing the country (68%) rather than more often than not the source of such problems (27%).

Belief in governments as solvers of problems is strong across the country, with the exception of Canadians with the lowest levels of education and income, and supporters of the Green Party and Bloc Québécois.

Americans are less positive about the role of government in their country, based on a January 2012 Environics survey. Barely half (49%) share the view that governments are essential to finding solutions to important problems, compared with 42 percent who believe that government more often than not are the cause of such problems. This latter view is most widely held by Americans in the \$35,000 to \$50,000 income bracket.

Are governments the solution or the problem?

Canada and USA 2011



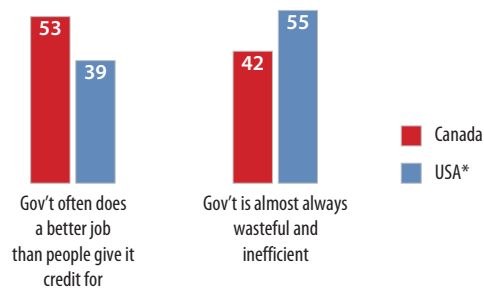
* Environics Institute survey, Jan. 2012

Canadians are not quite as positive about the efficiency with which governments operate. Four in ten (42%) believe government is almost always wasteful and inefficient, compared with 53 percent who say government often does a better job than people give it credit for. The negative perspective stands out most clearly in Quebec and among Bloc supporters.

U.S. public opinion is even less forgiving, with 55 percent describing their government as always wasteful and inefficient versus 39 percent who say it is better than people give it credit for (based on a February 2011 survey conducted by the Pew Research Center).

View about government

Canada and USA 2011



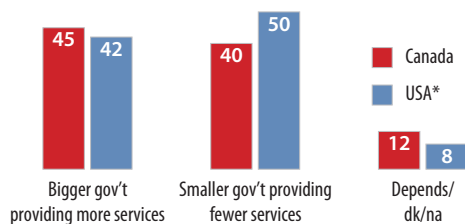
* Pew Research Center, Feb. 2011

IS THE SIZE OF GOVERNMENT TOO LARGE? Growing tensions between increasing demand for public services and the rising cost of providing them raises new questions about the size of government that taxpayers are prepared to support. Canadians are evenly divided on the broad question of whether they prefer a bigger government providing more services (45%) or a smaller government providing fewer services (40%).

This division exists across the population, but bigger government is more popular among non-European immigrants and NDP supporters, and especially among young Canadians (68%; compared with only 33% among those aged 60 plus).

The proportion advocating for smaller government doesn't exceed 50 percent, except among Conservative supporters (52%), whose views are closest to that of Americans who are more likely to favour smaller government with less services (50%) than bigger government with more services (42%) (based on a February 2011 Pew survey).

Type of government you would rather have
Canada and USA 2011

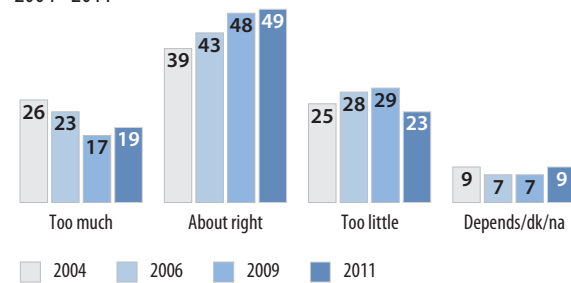


* Pew Research Center, Feb. 2011

GOVERNMENT REGULATION OF BUSINESS. The degree of government regulation of business has not been especially controversial in Canada for a number of years, and the public appears to be increasingly comfortable with the status quo. Half (49%) now say the amount of government regulation of business in Canada is about right, essentially unchanged since 2009. The remainder are split between those who say there is too little regulation (23%, down 6 points) or too much regulation (19%, up 2).

Belief in too little regulation is most evident in Quebec (especially among Bloc supporters) and among NDP supporters. Those who say there is too much regulation of business are most apt to be Conservative supporters or have no current party affiliation.

Amount of gov't regulation of business today
2004 - 2011



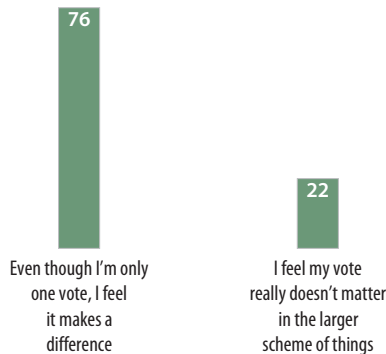
Political engagement

SENSE OF EMPOWERMENT. Declining voter turnout is an unmistakable trend across the country, but most Canadians feel voting makes a difference. Three-quarters (76%) of eligible voters agree with the view that “even though I’m only one vote, I feel it makes a difference,” compared with 22 percent who share the perspective “I feel my vote really doesn’t matter in the larger scheme of things.”

Opinions are largely similar across the country, but a sense of empowerment is most widespread among women, university graduates, and Canadians aged 60 and older. Those least apt to share this view are Green Party supporters and Canadians without a high school diploma.

Notably, a strong sense of political empowerment is at the national average among two groups that might potentially feel otherwise – Canadian youth (who are much less likely to vote) and voters dissatisfied with the current direction of the country.

View about voting in federal elections
2011



REASONS FOR NOT VOTING. When Canadians are asked (unprompted) why they think others are voting less than before, a range of reasons are offered, most of which fall into two broad categories. Two-thirds cite reasons having to do with the current system of government and politics, most notably that it doesn't make a difference who is elected or runs the government (30%), that politicians are no longer honest or inspiring (18%), that government is no longer effective in addressing important problems (8%), and there are not enough choices of candidates or parties (5%).

Half identify reasons that have more to do with voters themselves, particularly in terms of apathy about politics and government (31%), with fewer stressing lack of attention among youth (7%), people's busy schedules (5%) or general laziness (5%).

Responses to this question are notably consistent across regions, demographic subgroups and federal party affiliation.

Reasons for not voting

Unprompted responses 2011

Political system

Doesn't make a difference who is elected/runs government	30
Politicians don't inspire people	18
Government no longer effective in addressing important issues	8
Not enough choice of parties or candidates	5
Voting system is no good	4
Too many/unnecessary elections	2

Voters themselves

Apathy/people no longer care	26
Young people don't care about politics/elections	7
Politics no longer as important to people	5
Laziness/people can't be bothered	5
Busy schedules/people don't have time	5
People don't know enough	3

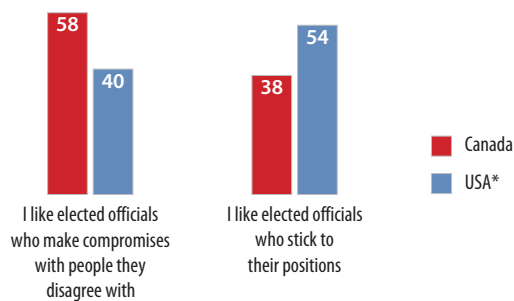
SHOULD POLITICIANS COMPROMISE? Federal politics has grown increasingly partisan over the past few years, which may be another factor driving voter disengagement. Six in ten (58%) Canadians say they prefer elected officials who make compromises with people they disagree with, compared with 38 percent who prefer elected officials who stick to their positions.

This preference for compromise is evident across the country, but is strongest in Quebec, among Canadians with higher levels of education and income, and supporters of the NDP, Bloc and Green parties. By comparison, Conservative supporters are evenly split between those wanting officials who compromise and those who prefer politicians who stick to their positions.

Partisanship is notably stronger in the U.S., where the public prefers politicians who stick to their positions (54%) over those who compromise (40%) (based on a February 2011 Pew survey).

Type of politician preferred

Canada and USA 2011



* Pew Research Center, Feb. 2011

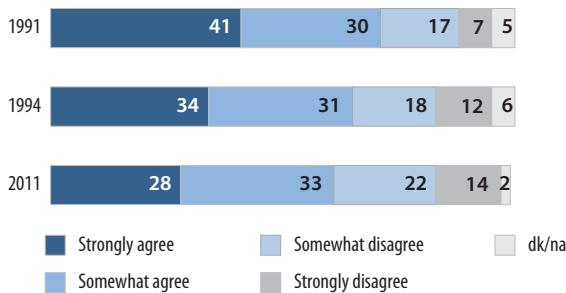
Role of Public Sector Unions

ARE UNIONS TOO POWERFUL? Union membership and influence has been declining in Canada over the past 30 years, but Canadians continue to believe they have too much power for the good of the country, although less so than in the 1990s.

Six in ten strongly (28%) or somewhat (33%) agree that “labour unions have too much power for the good of the country;” compared with more than three in ten who somewhat (22%) or strongly (14%) disagree. This represents a significant shift from 20 years ago when four in ten strongly agreed with this sentiment.

The view that unions are too powerful is most widespread in Ontario and Quebec, and among federal Conservative supporters, and is least evident in union households (especially private sector unions) and among NDP supporters. Since 1994, agreement has declined among most groups, except in Ontario, among university-educated Canadians, members of public sector unions and Conservative supporters.

Labour unions have too much power for the good of the country
1991 - 2011

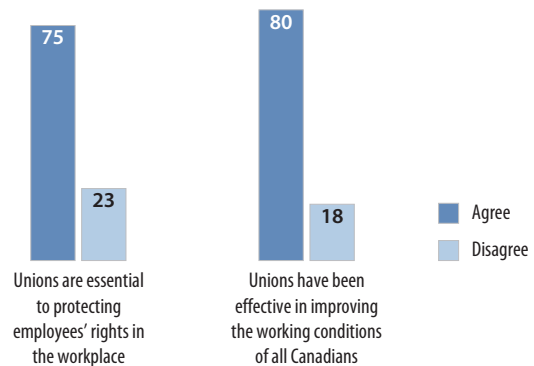


ARE UNIONS IMPORTANT AND EFFECTIVE? Despite public perceptions about the power of unions today, they are also seen by most as important and effective institutions. Three-quarters (75%) of Canadians agree that “unions are essential to protecting employees rights in the workplace” and eight in ten (80%) agree “unions have been effective in improving working conditions for all Canadians.”

This perspective is held by clear majorities across the country, with modest variation in strength. The belief that unions are essential to protecting employee rights is most widespread in Atlantic Canada and Manitoba, with disagreement most evident among higher income Canadians, Vancouverites and allophones. Agreement that unions have improved working conditions for all Canadians is most widespread in Quebec and among rural residents, and least so in Toronto and Vancouver.

For both statements, the largest gap is between supporters of the federal NDP and union households on the one hand, and Conservative supporters on the other (although a majority in this group still agree with both statements).

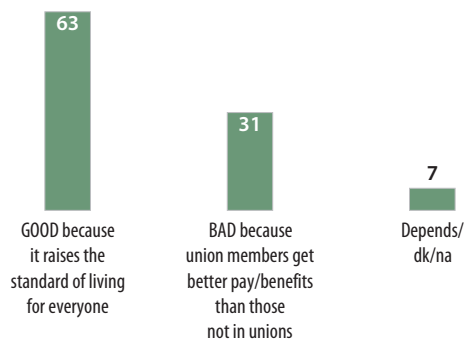
Effectiveness of unions in improving working conditions
2011



Moreover, Canadians largely reject the idea that unions end up benefitting their members to the detriment of other, non-unionized workers. Six in ten (63%) believe it is a good thing when unions negotiate better pay and working conditions for their members because it raises the standard of living and sets an example for other workplaces. In contrast, three in ten (31%) believe such negotiations are unfair because people in unions get better pay and benefits than those not in unions.

Opinions are notably consistent across regions and demographic groups, but vary by political affiliation in a predictable pattern (most positive views among NDP, Bloc and Green Party supporters, least so among Conservative supporters).

Impact of union-negotiated pay/benefits 2011



PUBLIC SECTOR UNION RIGHT TO STRIKE. Positive views about the contribution of unions notwithstanding, the public is divided on the issue of whether public sector unions should have the right to strike when negotiations with management break down. Half (49%) of Canadians believe the collective bargaining process should run its course without interruption even if it sometimes results in a strike, while a similar proportion (46%) say all public sector strikes should be banned and settlements imposed by a third-party arbitrator.

Such division is evident across the country, but union-friendly sentiments are more evident in B.C. and Saskatchewan, among Canadians aged 18 to 29, union households, and NDP and Green Party supporters. Preference for banning strikes is the majority view among top income earners and Conservative supporters.

When public sector negotiations break down ... 2011



Immigration and Multiculturalism

Attitudes towards immigration

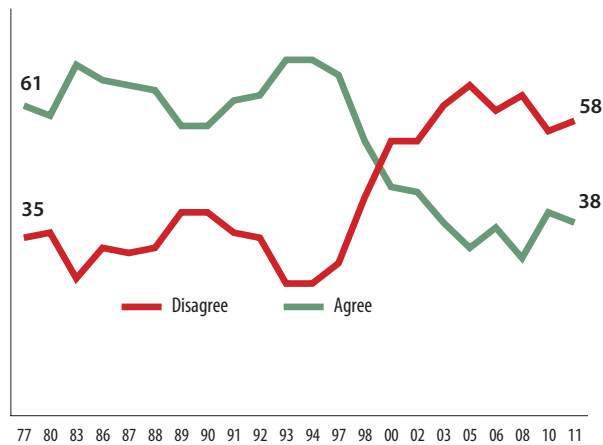
Environics' studies over the past few decades have documented how Canadians are increasingly viewing the country's multicultural mix as a positive aspect of the country (in sharp contrast to the experience in many other developed countries). While this issue has become increasingly politicized over the past year, Canadian public attitudes remain largely positive, after having softened somewhat between 2008 and 2010. The following "agree/disagree" statements serve as key indicators:

"Overall, there is too much immigration in Canada." A majority (58%) of Canadians continue to *disagree* with this statement, up marginally (up 2 points from 2010). This trend is most noticeable in Atlantic Canada, Saskatchewan and Alberta, as well as among rural residents, while the opposite view (agreement there is too much immigration) has increased over the past year in Vancouver and Manitoba.

Belief there is too much immigration is most evident in Ontario and Vancouver, among Conservative supporters, and especially among Canadians without a high school diploma (61%).

Immigration levels too high

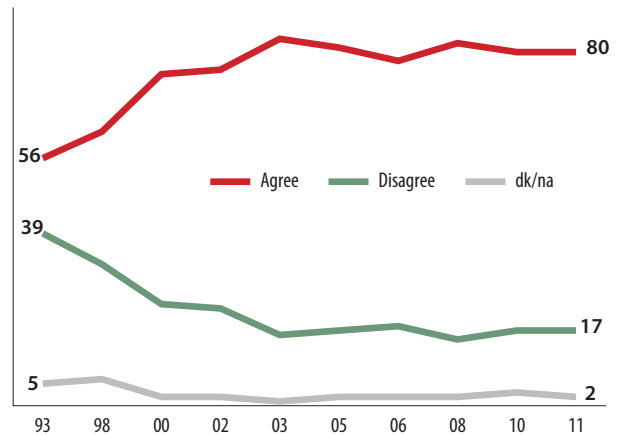
1977 - 2011



"Overall, immigration has a positive impact on the economy of Canada." A strong majority (80%) continue to agree with this statement, essentially unchanged over the past eight years. Opinions are similar across the country, but a positive view about the economic impact of immigrants is most widespread among Canadians with the most education and income.

Economic impact of immigration is positive

1993 - 2011

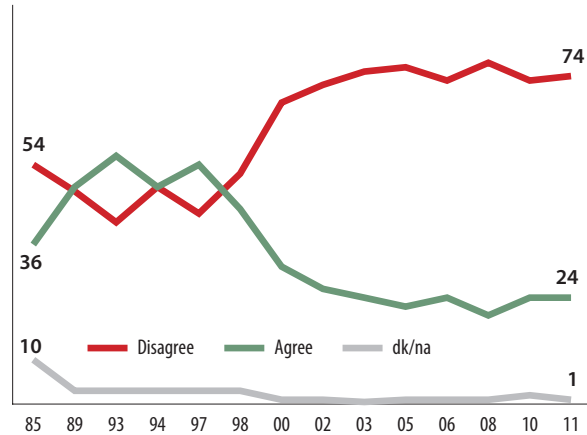


“Immigrants take away jobs from other Canadians.”

Consistent with the previous statement, most (74%) Canadians continue to reject the idea that immigrants take jobs from other Canadians (essentially unchanged from 2010). Rejection of this statement is expressed across the country, but most widely by Quebecers, immigrants, and Canadians with higher levels of education (by comparison, those without a high school diploma are evenly split on this statement).

Immigrants take away Canadian jobs

1985 - 2011



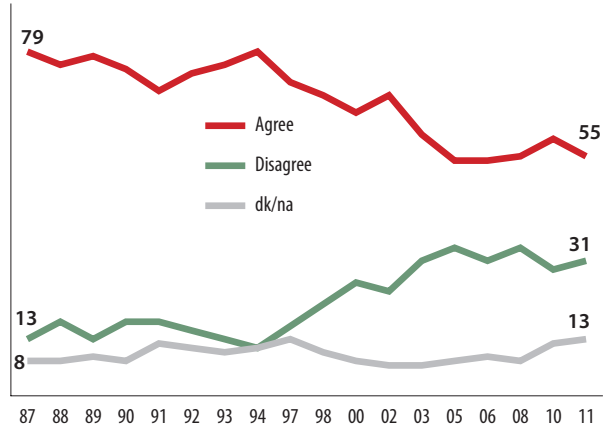
“Many people claiming to be refugees are not real refugees.”

Canadians have consistently been more likely than not to believe that many ostensible refugees to this country are not legitimately fleeing persecution in their home country, but this view has declined over the past year. A modest majority (55%) now agree with this statement (down from 59% in 2010), reversing the previous trend.

This latest downward trend is most evident in Atlantic Canada, Saskatchewan and Alberta, while rising marginally in Quebec. Agreement with the statement continues to be most widespread in Ontario, among Canadians aged 60 plus and Conservative supporters, although it has not strengthened in any of these groups since 2010.

Refugee claimants not legitimate

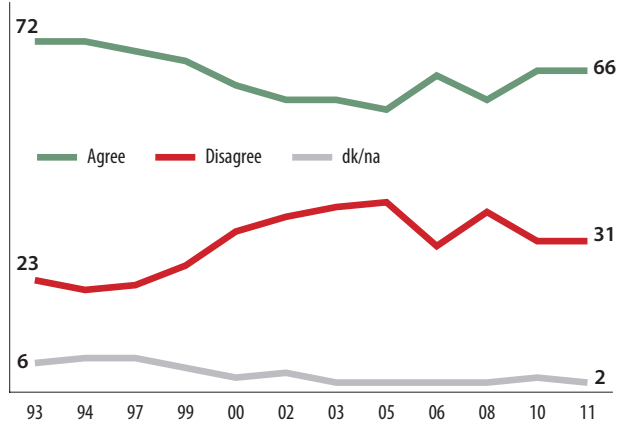
1987 - 2011



“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 extent to which newcomers are integrating culturally into the country. As before, a majority (66%) agree with this statement (unchanged from 2010, following an increase over the previous two years).

Across the country, agreement has declined in Atlantic Canada and Saskatchewan, while increasing in Quebec (at 71%, now the highest of any province) and among Canadians in the top income bracket. Concerns about adoption of Canadian values remains higher among older Canadians, the less educated and Conservative supporters, and is also now highest among Bloc supporters (85%, up 14 points from 2010).

Too many immigrants do not adopt Canadian values
1993 - 2011



Contact and perceptions of minority groups

As the country's population continues to accept an increasing number of immigrants from outside its borders, Canadians are coming into contact with a more diverse range of fellow citizens than ever before. Moreover, this trend is also apparent with respect to other minority groups, based on language and sexual orientation.

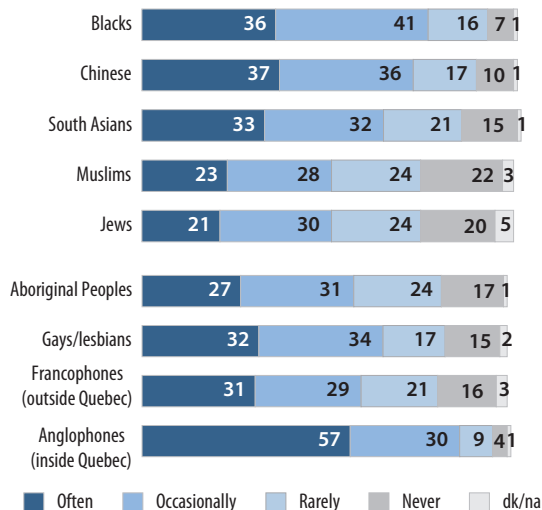
PERSONAL CONTACT WITH MINORITY GROUPS.

Canadians' personal contact with individuals from *other ethnic groups* has increased since 2006, and is now at the highest levels recorded on Focus Canada (dating back to the 1980s). Three-quarters report having personal contact often or occasionally with others who are Black (77%, up 8 points) or Chinese (73%, up 8). A smaller but faster growing majority report such contact with individuals from South Asian origin (e.g., India and Pakistan) (65%, up 11). By comparison, about half report often or occasional contact with Jews (51%, up 1) or Muslims (51%, up 5).

Contact with ethnic groups varies somewhat across the country in a predictable pattern. Frequent contact with Jews, Blacks and Muslims is most widely reported in Toronto, while South Asians and Chinese are most likely to be encountered often in Vancouver. Across all ethnic groups, frequent contact increases with education and income, while decreasing with age. In all cases, frequency of contact is higher in urban areas, but increases since 2006 are mostly in smaller communities.

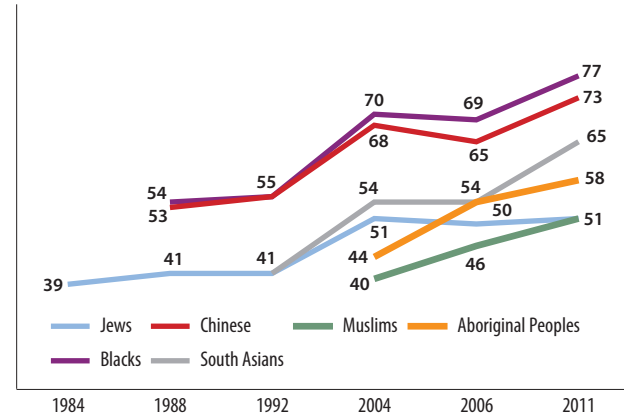
Contact with minority groups

2011



Contact with minority groups

Often/occasionally 1984 - 2011



In terms of *non-ethnic minorities*, most Canadians say they have frequent or occasional contact with individuals from the "other" linguistic minority, although this is much more apt to be the case among anglophones living in Quebec (87%, up 8 points since 2006) than among francophones elsewhere in Canada (60%, down 2).

The past four years have seen a modest increase in frequent/occasional contact with Aboriginal Peoples (58%, up 4 points). Frequent contact with Aboriginal Peoples is most common in the West, especially in Manitoba (57%, up 9 points since 2006).

In 2011, Focus Canada included the gay and lesbian community in this set of questions. Two-thirds of Canadians say they often (33%) or occasionally (34%) have contact with members of the gay and lesbian community, with frequent contact most widely reported by residents of Toronto and Montreal, top income earners, Canadians under 30, and those who are not Christian. No more than one-quarter of any group say they have *never* had contact with members of this community, with the notable exceptions of allophones (46%) and those without a high school education (39%). (Note: the survey did not also ask respondents to identify their own sexual orientation.)

DISCRIMINATION AGAINST MINORITY GROUPS.

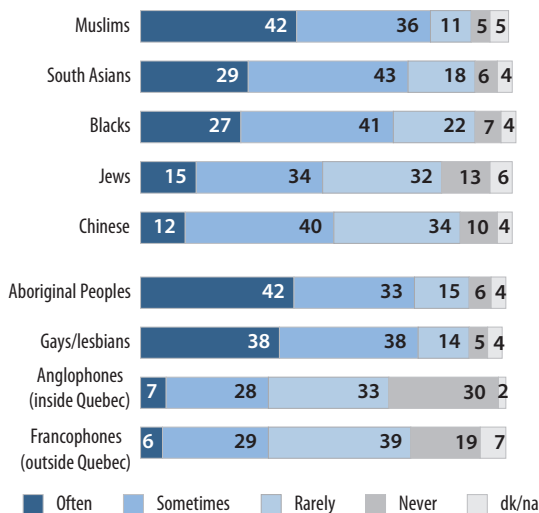
While most Canadians take pride in their country as a place that accepts people from all countries and cultures, many also believe individuals from minority groups in Canada experience discrimination on an ongoing basis, with opinions notably unchanged over the past five years.

Perceptions about the frequency of discrimination against *ethnic groups* have changed little since 2006, although Canadians are now somewhat less likely to say this happens “often” as opposed to “sometimes.” As in 2006, Canadians are most likely to say Muslims in this country experience discrimination often (42%, down 2 points), followed by South Asians (29%, down 7), Blacks (27%, down 5), Jews (15%, down 2) and Chinese (12%, down 1).

Perceptions vary modestly across the country. Quebecers are most likely to see frequent discrimination against Blacks, Jews and Muslims, while it is Vancouverites who are most apt to be sensitive to the experience of the Chinese community. Ontarians are most likely to identify discrimination against South Asians – but in Toronto, perceptions of discrimination against the Black community has declined noticeably since 2006 (down 11 points to 32%).

Perceptions of frequent discrimination tend to increase with education level and decline with age. The influence of personal contact appears to have limited influence on perceptions of discrimination, except as it applies to the Black community (the more frequent the contact, the more

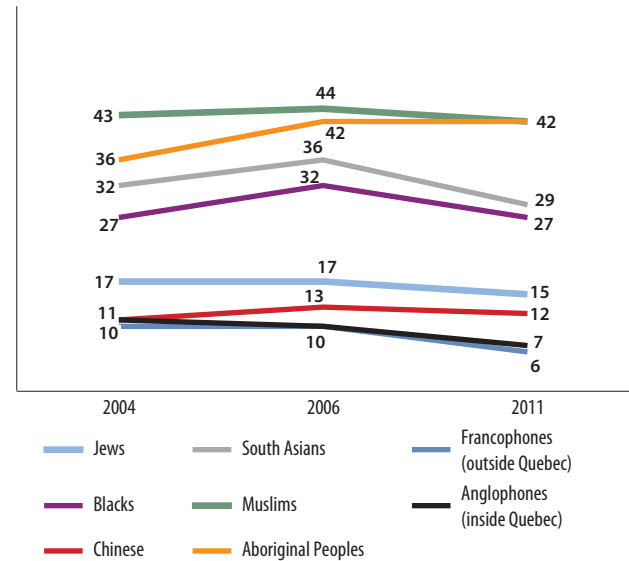
Perceived frequency of discrimination in Canada 2011



common discrimination). Finally, views about the extent of discrimination against ethnic groups are not related to opinions about the level of immigration or the extent to which immigrants are adopting Canadian values.

Groups often subject to discrimination

2004 - 2011



Among *other minorities*, four in ten (42%) continue to say that Aboriginal Peoples experience frequent discrimination (unchanged from 2006), while a slightly smaller proportion (38%) believe this also happens to gays and lesbians in Canada, with another 38 percent saying this occurs at least sometimes. In terms of linguistic groups, few (6%, down 4 points) believe that Official Language minorities experience frequent discrimination from the majority, with this perspective essentially the same in Quebec and the rest of the country.

Perceptions about discrimination against Aboriginal Peoples have declined in Manitoba, Alberta and B.C. since 2006, although this view remains more prevalent in the west, as well as among university-educated Canadians, NDP supporters, and those who report frequent contact with this community.

Perceptions of frequent discrimination against gays and lesbians is most widespread in Manitoba, among women and Canadians 18 to 29 years old, while least evident among non-European immigrants and allophones. In this case, personal contact is closely linked to opinions about discrimination.

Crime and Justice

Crime trends

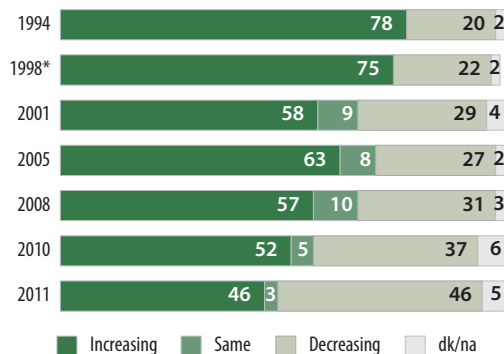
ARE CRIME RATES INCREASING OR NOT? Government and police statistics reveal a steady decline in crime rates over the past two decades, and Canadians' perceptions about increasing crime rates are also declining and are now now the lowest on record (since Focus Canada tracking began in 1994).

Fewer than half (46%) now say that crime rates are on the rise (down 6 points since 2010), while an equal proportion believe crime is declining and that the media is over-dramatizing crime stories (46%, up 9). Three percent volunteer that crime rates are holding steady, while another five percent are unable to offer an opinion on this question.

This trend of declining perceptions about rising crime rates is evident across most the country, but most noticeably in Ontario, Saskatchewan and Alberta. Concerns about rising crime rates continue to be more widespread among residents of Manitoba (possibly due to concerns about gang violence in Winnipeg) and, to a lesser extent, in Atlantic Canada. Crime rates are more likely to be seen as rising among residents of rural communities than those living in cities, and this gap has widened over the past year. Perceptions of rising crime continue to be most evident among Canadians with lower socio-economic status and Conservative supporters.

Crime rates – real increase or media hype?

1994 - 2011



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

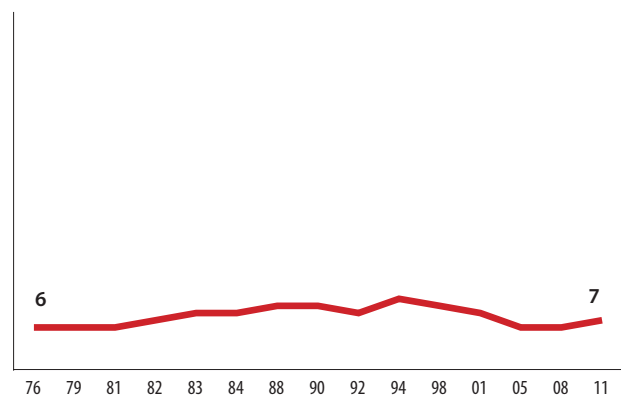
PERSONAL EXPERIENCE WITH CRIME. Perceptions of crime rates are one thing, but what about personal experience? Seven percent (7%) of Canadians report having been a victim of a criminal act in the previous six months, consistent with Focus Canada data collected as far back as 1976 (with the rate varying by only a couple of percentage points, and peaking at 10% in 1994).

As before, reports of crime victimization are marginally higher in Saskatchewan (13%), Manitoba (12%) and B.C. (9%), and among Canadians 18 to 29 years of age (11%).

Among those reporting such experience, seven in ten (72%) say they reported this crime to police. This reflects an increase from 2008 (66%), but remains below the level recorded in 2001 and 2005 (77%).

Been victim of a crime in past six months

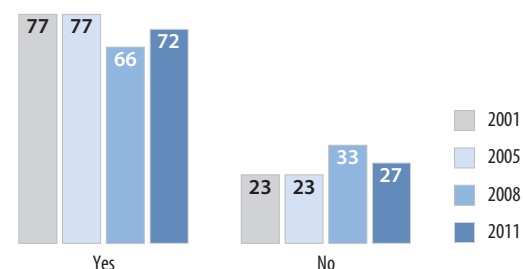
1976 - 2011



Reported the crime

Among those who have been victim of crime in past six months

2001 - 2011



Crime prevention and control

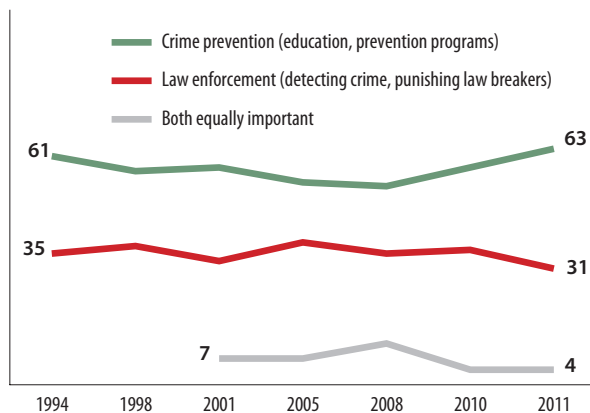
CRIME PREVENTION VERSUS LAW ENFORCEMENT.

In terms of how governments are expected to fight crime, Canadians have long expressed the view that prevention is a better approach than enforcement. This sentiment has strengthened over the past year, continuing a trend dating back to 2008.

When asked which of two approaches should be given greater emphasis by governments, more than six in ten (63%, up 5 points from 2010) identify crime prevention (e.g., education, crime prevention programs), compared with half as many (31%, down 5) who place a higher priority on law enforcement (detecting crime, punishing lawbreakers). These latest results reflect the largest gap between these two perspectives since Focus Canada began tracking this question in 1994.

This growing emphasis on crime prevention is evident across the population, with the shift since 2010 most noticeable in Atlantic Canada, the Prairies and in smaller-sized communities. Conservative Party supporters remain less likely than others to support an emphasis on prevention over enforcement, but are also more likely to do so than a year ago (51%, up 9 points).

Government emphasis on crime and justice 1994 - 2011

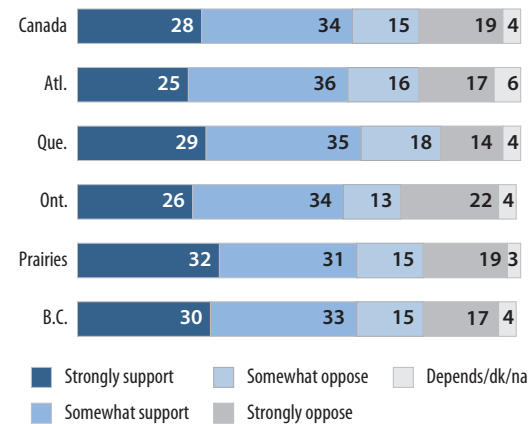


NEW OMNIBUS CRIME LEGISLATION. Declining public concerns about crime notwithstanding, Canadians are broadly supportive of the federal government's new omnibus crime bill, which (among other things) will increase the length of jail time for some offences and reduce judges' discretion on sentencing. Six in ten say they strongly (28%) or somewhat (34%) support this legislation, compared with one-third who somewhat (15%) or strongly (19%) oppose it.

The legislation attracts majority support across the country, but most widely in Alberta, in communities with fewer than 100,000 inhabitants, allophones and Conservative Party supporters (but also attracting small majorities of Liberal, NDP and Bloc supporters). Support for the new bill is comparatively weaker in Saskatchewan, among university graduates, Canadians aged 60 plus and those with no religious affiliation.

Support for new federal gov't omnibus crime legislation

By region 2011



Several provinces have warned that this new legislation will require them to spend additional millions on law enforcement and new prisons, but this message is having a limited effect on those who support the bill. Among supporters, six in ten (62%) say they are just as likely to support the new crime laws despite the increased provincial spending it may require, compared with only one-third (35%) who say this would make them less likely to support it.

Such support in the face of increased provincial costs reflects the majority view across the country, although it is comparatively weaker in Ontario and Quebec, as well as among allophones, Canadians aged 18 to 29, and those with the lowest levels of education and income (groups most vulnerable to changing economic conditions).

Canada's Role in the World

Global issues

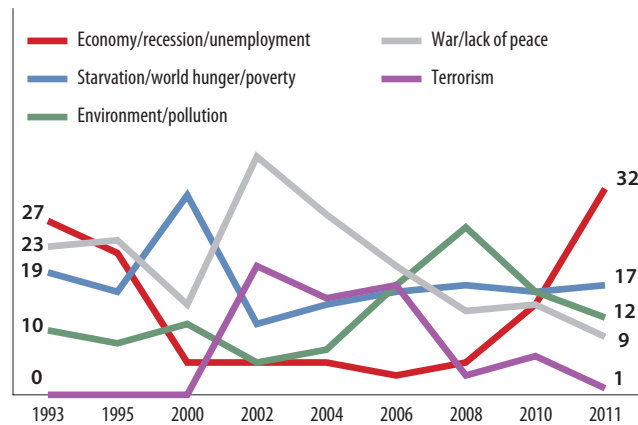
MOST IMPORTANT GLOBAL ISSUE. What do Canadians consider the most pressing issue facing the world today (unprompted)? In 2010, no one issue dominated public attention, but in 2011 it is now about the global economy. One-third (32%) identify economic issues (e.g., recession, global markets) as the world's most pressing issue (up 18 points from last year). By comparison, stable or declining proportions now mention starvation/world hunger (17%, up 1), environment or pollution (12%, down 4), or war/lack of peace (9%, down 5), with no other issue attracting more than three percent of responses.

These results reflect a substantial change from early 2008, when the environment was at the top of the list (26%) and the economy trailed well behind (5%). Attention on terrorism as a top global threat has almost disappeared (now at 1%), returning to pre-September 11 levels.

Global economic issues are now the top issue across the country, standing out most prominently in Ontario and B.C., as well as among Canadians with higher levels of education and income, men, non-European immigrants and Conservative supporters.

Most important global issue

1993 - 2011



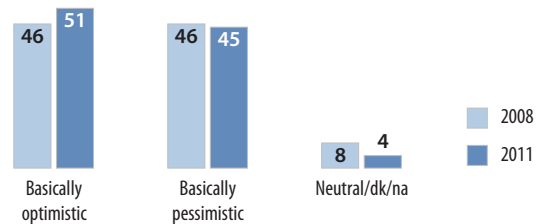
OPTIMISTIC OR PESSIMISTIC ABOUT THE FUTURE?

Despite global concerns, Canadians are more likely than not to be positive about the direction they feel the world is heading over the next 10 years. Half (51%) are basically optimistic about where they see the world heading (up 5 points from 2008), compared with 45 percent who are basically negative (down 1).

Optimism has spread in all provinces except Quebec (where it has held steady), with this trend most pronounced in Alberta and B.C. The most optimistic view of global trend is now expressed in Alberta, while least evident among NDP supporters, Evangelical Christians and followers of non-Christian religions, as well as those dissatisfied with the direction of the country today (although at least 40% in each of these groups expresses optimism).

Direction the world is heading

2008 - 2011



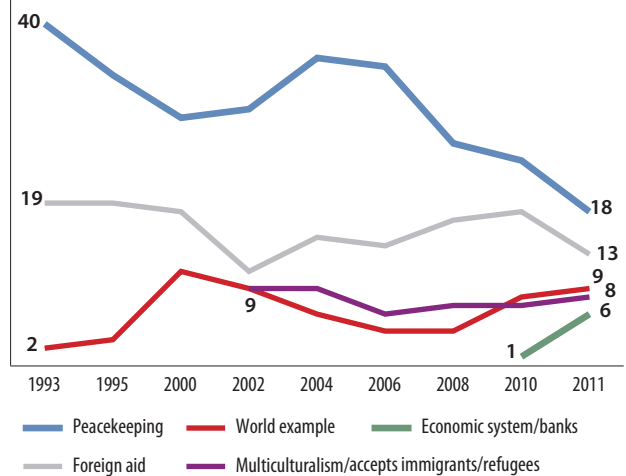
Note: 2008 data from Environics Institute's Canada's World survey

Canada's place in the world

MOST POSITIVE CONTRIBUTION. In what areas is Canada seen as making a positive difference in the world today? When asked unprompted, the most common responses continue to be peacekeeping (18%) and foreign aid (13%), but both categories continue to diminish in salience (down 6 points and 5 points, respectively, since 2010), with the former now at an all-time low.

Other noted areas of contribution continue to be setting an example for other countries (9%, up 1 point) and multiculturalism/accepting immigrants (8%, up 4), while for the first time an appreciable number (6%) refer to the country's strong banking system. At the same time, an growing proportion (25%, up 5) cannot identify any positive contribution that Canada makes to the world, with this view up most noticeably in Quebec (37%, up 10). Quebecers and allophones continue to place comparatively greater emphasis on foreign aid.

Canada's most positive contribution to the world
1993 - 2011



PERSONAL FINANCIAL SUPPORT OVERSEAS. Many Canadians feel strongly connected to the world outside the country's borders, and in ways not limited to passively following global issues or watching their own government's foreign policy. For an increasing number, this focus inspires financial support, to organizations working in other countries or friends and family members in need of support.

Close to half (46%) report that in the past two years they *have donated money to one or more organizations that address problems or issues in other countries*, which is up from 39 percent who did so in early 2008. Of this group, Canadians were most likely to report donations of under \$250 (41%) in the past 12 months, but another 17 percent report donations of \$1,000 or more, with the average donation of \$794. This figure is marginally lower than the \$860 average reported in 2008, due in part to a larger donation base and in part to the recent economic downturn. Projected to the country's population (aged 18 and over), this translates into almost 10.6 million Canadians contributing approximately \$8.4 billion over the past year (up from \$7.3 billion in 2008).

The increased incidence of giving financial assistance to such organizations is evident across the country, but has widened most noticeably in Atlantic Canada and Alberta, and is most widespread in Saskatchewan, among Canadians with higher levels of education and income, and those with a religious affiliation (with the notable exception of Catholics, who along with Quebecers are least apt to make such donations). Average dollar amounts given to aid organizations over the past 12 months are highest in Ontario and the Prairies, and among Canadians aged 60 plus, Conservative supporters and Evangelical Christians.

Financial assistance given overseas in past two years 2008 - 2011



Note: 2008 data from Environics Institute's Canada's World survey

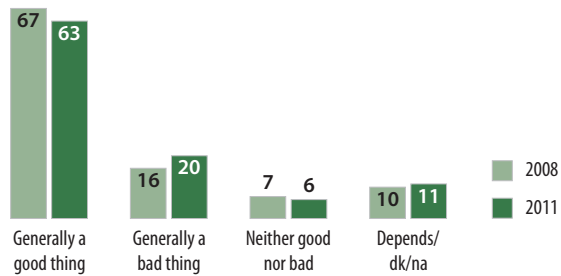
One in four (26%) Canadians say they *provided financial support to family members or others they know living in another country* (often referred to as "remittances"), which is up from 18 percent who reported this in 2008. In this category, the average dollar figure contributed over the past 12 months is \$2,166, which is down noticeably from that reported in 2008 (\$5,938). Projected to the population provides an estimate of \$12.4 billion, which is down from the \$20 billion provided in 2008, but well above the \$4 billion in official development assistance currently given by the Canadian government on an annual basis.

The growing proportion of Canadians helping individuals overseas is again most notable in Atlantic Canada and Alberta (which now leads all regions at 37%). Such contributions are most widely reported by non-European immigrants and allophones, and increase along with education and income. Quebecers are least apt to provide such assistance.

CANADIANS LIVING ABROAD. What does the public think about the fact that an estimated three million Canadians currently live abroad? Six in ten (63%) believe this is generally a good thing for Canada, although this proportion is down marginally since 2008 (down 4 points). One in five (20%, up 4) say it is generally a bad thing, while a similar number (17%, unchanged) do not have a clear opinion either way.

This decline in positive views about expatriates has taken place primarily in eastern Canada and B.C., and is now most likely to be an issue for Quebecers and Manitobans, as well as non-European immigrants (although held by no more than three in ten in any of these groups).

Opinion of 3 million Canadians living abroad
2008 - 2011



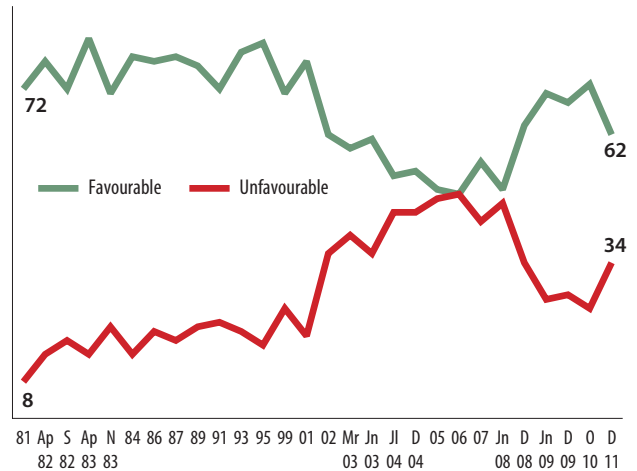
Note: 2008 data from Environics Institute's Canada's World survey

Canada – U.S. relations

OVERALL OPINION OF THE U.S. Canadians' overall impression of their neighbour to the south has declined sharply over the past year, reversing what has been mostly a positive trend following Barack Obama's ascendency to the White House. Six in ten (62%) have a favourable view of the United States, down 11 points since 2010, and now at its lowest point since June 2008 (when Bush was still President).

This decline has taken place across the country, but most significantly in Quebec, Saskatchewan and B.C., as well as among non-European immigrants. Positive views are most widely held by Atlantic Canadians and Ontarians, Canadians aged 45 years and older, and Conservative supporters, and least evident among British Columbians, Canadians aged 18 to 29, allophones and Green Party supporters.

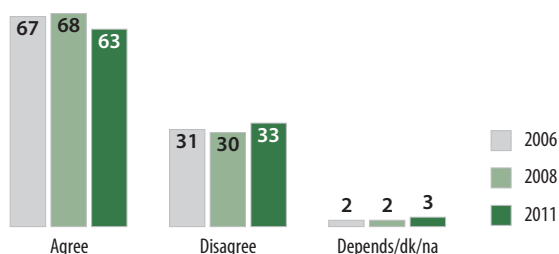
Overall opinion of the United States
1981 - 2011



TERRORISM AND BORDER SECURITY. The Canadian government recently signed a new border plan with the U.S. to strengthen security and expedite the flow of travellers and goods. The public remains supportive of joint Canada-U.S. border policies, although marginally less so than in 2008. Close to two-thirds (63%) agree that both countries should adopt a common policy regarding immigration and border control (down 5 points from 2008), compared with one-third (33%) who disagree (up 3).

This drop in support is most evident in central Canada and the Prairies (while increasing in BC). Support is strongest in Atlantic Canada, among Canadians with lower levels of education and Conservative supporters, while weakest among allophones, followers of non-Christian religions and NDP supporters.

Canada and U.S. should adopt common policy on immigration and border control
2006 - 2011

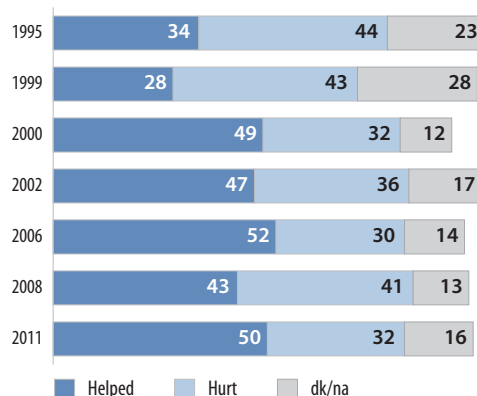


IMPACT OF NAFTA. While Canadians may be growing a bit more wary of the U.S., they have also become more positive about the impact of the North American Free Trade Agreement (NAFTA) signed with the U.S. and Mexico more than a decade ago. Half (50%) now say that NAFTA has helped the Canadian economy (up 7 points since 2008), compared with 32 percent who believe it has hurt the domestic economy (down 9) and another 18 percent who can't see a clear difference either way (up 2). Current opinions of NAFTA have rebounded modestly to levels recorded in 2006, and are now comparable to levels of support recorded between 2000 and 2006.

This improving trend is evident across most of the country, but most noticeably in Quebec and B.C. Positive views about NAFTA continue to be most widespread among more affluent Canadians and those living in urban areas, while the most negative perception is expressed by NDP and Green Party supporters.

U.S. public opinion about free trade with other countries (generically) is a bit less positive, with 48 percent considering it a good thing for the U.S., compared with 41 percent who say it is a bad thing (from a February 2011 Pew Research Center survey).

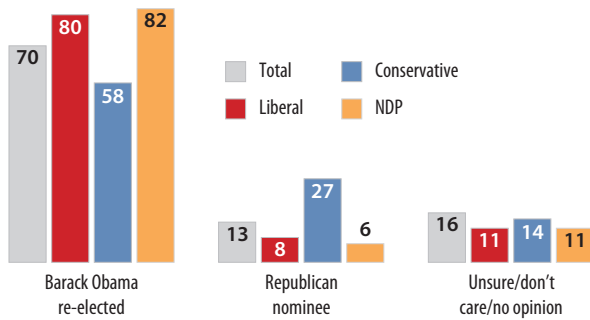
Impact of NAFTA on Canadian economy
1995 - 2008



2012 U.S. PRESIDENTIAL ELECTION. U.S. President Barack Obama was widely popular in Canada when first elected, but how is he viewed today? Despite his many challenges and disappointments (and declining positive impressions of the U.S. overall), President Obama retains strong support among Canadians, with seven in ten (70%) preferring to see him re-elected in November over whomever the Republicans choose as their nominee (the preference of just 13%).

Obama is the runaway choice among all identifiable groups of Canadians, but especially among Quebecers, university graduates, and supporters of the federal Liberals, NDP and Bloc. Preference for the eventual Republican nominee is most evident among Albertans (23%), allophones (25%) and Conservative supporters (27%, versus 58% who would like to see Obama re-elected).

Preferences for next U.S. president
By party affiliation 2011



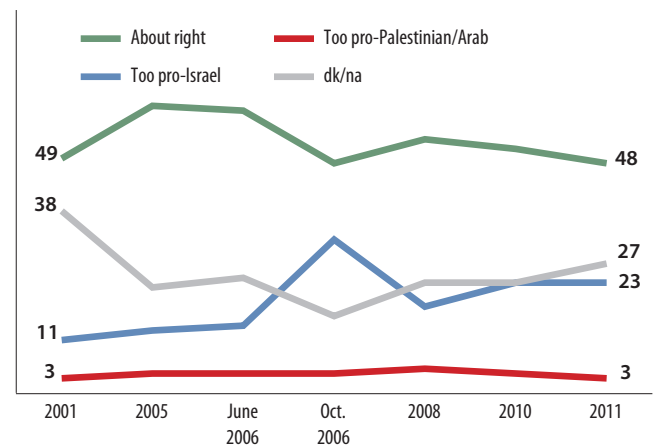
The Middle East

CANADA'S MIDDLE EAST POLICY. Canada's policy approach to the Israeli-Palestinian conflict has shifted noticeably over the past several years, as the Harper government has publicly adopted pro-Israeli positions at the UN and in the media. This change has not affected the public's general assessment of the government policy, and opinions have held notably consistent over the past five years.

Half (48%) of Canadians continue to believe current policy strikes the right balance, down marginally from 2010 and largely unchanged over the past decade. By comparison, one in four (23%, unchanged) say the government is too pro-Israel, while only three percent believe the government is too pro-Palestinian. An increasing proportion (27%, up 4 points) is unable to offer a clear opinion on this issue, now at its highest level since 2001.

Underneath the stable national numbers, belief in current government policy as too pro-Israeli increased in the Prairie provinces, as well as among older Canadians, those with higher socio-economic status and NDP supporters. This view is most widely expressed by Quebecers (especially in Montreal), university graduates and Bloc supporters. Few in any group believe the Harper government is too pro-Palestinian, although this sentiment is articulated mainly by non-mainline Christians and non-Christians (e.g., Muslims, Hindus, Sikhs).

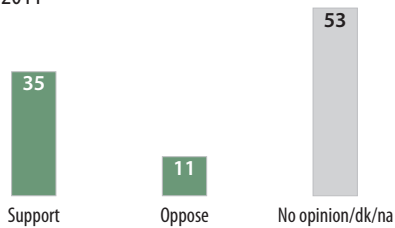
Canada's Middle East policy
2001 - 2011



PALESTINIANS' BID FOR STATEHOOD. The Palestinian Authority recently launched a bid to be officially recognized as a state by the United Nations. Canadian public opinion is not well-defined on this issue, with more than half (53%) indicating they have no opinion. Of the remainder, however, support (35%) for the Palestinian bid outweighs opposition (11%) by a three-to-one margin.

Support is most widely expressed in Quebec and Ontario (especially in Montreal and Toronto), among men, university graduates, non-European immigrants, and those who support the NDP or Green Party. Opposition falls below one in five in all identifiable groups, but is most evident among Canadians aged 60 plus and Conservative supporters.

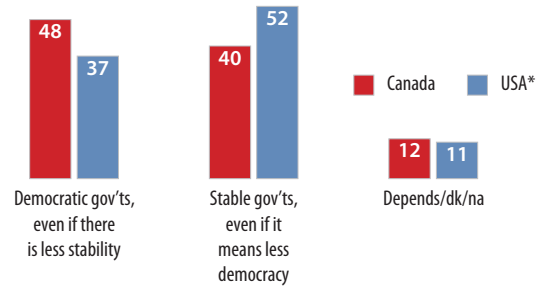
Support for Palestinian bid for UN recognition of statehood 2011



DEMOCRACY VERSUS STABILITY IN THE MIDDLE EAST. Political turmoil and renewal have swept over much of the Middle East over the past year, and the political situation in countries such as Egypt and Syria remains volatile. Canadians express a modest preference for democratic governments, even if it means less stability in the region (48%) versus stable governments, even if it means less democracy (40%). Americans, by comparison, are more likely to place a priority on Middle East stability (52%) over democracy (37%) (from a February 2011 Pew survey).

In Canada, preference for democracy over stability is most clearly evident in Quebec, among Canadians with higher socio-economic status, European immigrants, and NDP and Bloc supporters, while the reverse is most apt to be voiced by allophones and Conservative supporters.

Preference for governments in the Middle East 2011



* Note: U.S. data from Pew Research Center, Feb. 2011

Religion in Canada

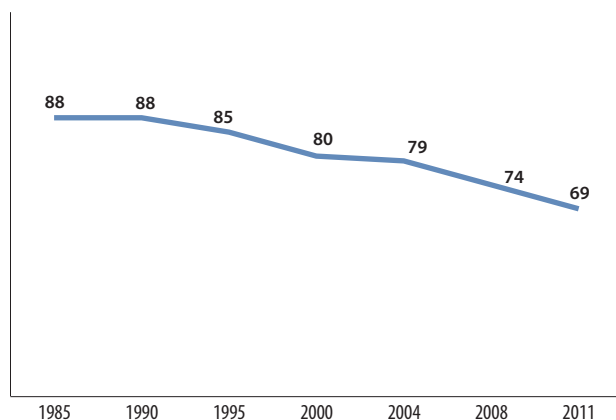
Religion no longer has the prominent place in Canadian society that it once had, as a source of personal and collective identity, as a set of important institutions, and the basis for spiritual practice, ethics and behaviour. As a result, religion is no longer visible in the public sphere or the focus of public discussion (except on those occasions when “unfamiliar” religious customs – Muslim head scarves and Sikh daggers – generate controversy). This secular trend notwithstanding, religion continues to play an important role in the lives of many Canadians, and so warrants attention. This year, Focus Canada updated trends on Canadians’ own religious affiliations and explored religion in a social context.

Personal connection

RELIGIOUS AFFILIATION. Statistics Canada has documented a steady decline in formal affiliation to mainline Christian denominations over the past half century, and Focus Canada indicates this trend is continuing. Seven in ten (69%) Canadians now identify a religious affiliation, now at its lowest point based on levels reported by Statistics Canada over the period 1985 to 2008.

Religious affiliation among Canadians

1985 - 2011*



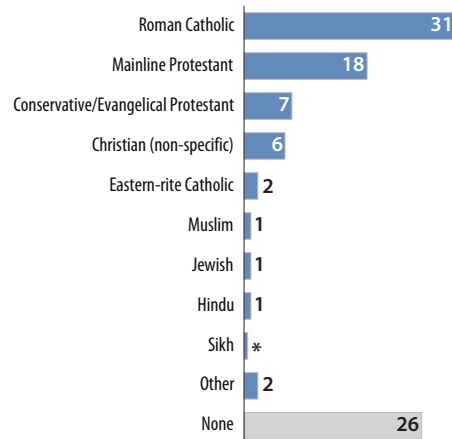
* 1985-2008 from Statistics Canada (population aged 18+)

Specific religious affiliation has changed relatively little over the past four years. Among Canadians who report a religious affiliation, 31 percent identify as Roman Catholic, 25 percent as Protestant, which breaks down as 18 percent mainline (e.g., United, Anglican), and seven percent Conservative or Evangelical. Another eight percent (up 3) identify as another form of Christian, which includes Greek Orthodox (2%) or “other” (6%), most of whom identified themselves only as “Christian.”

One in four (26%) report no religious affiliation (e.g., atheist, agnostic) (up 3 points from 2008), with this group most prevalent in B.C., among men, Canadians in the top income bracket, and those 18 to 29 years of age.

Specific religious affiliation

2011



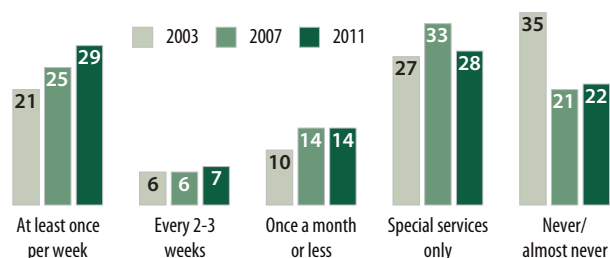
* Less than one percent

ATTENDING RELIGIOUS SERVICES. Although the proportion with a religious affiliation continues to drop, these Canadians are as observant as ever in terms of attending religious services. Three in ten (29%) say they attend services at least once a week (up from 25% reported in Focus Canada in 2007, and 21% in 2003), while fewer now doing so only for special services (e.g., Christmas mass, Jewish High Holidays) (28%, down 5 points from 2007).

Another one in five (22%, up 1) continue to say they have a religious affiliation but never attend services, with this group most prominently represented by Quebec residents and Catholics. In contrast, weekly attendance is most widely reported by Evangelical Christians (56%) and members of non-Christian faiths (42%).

Frequency of attending religious services

Among those with religious affiliation 2003- 2011



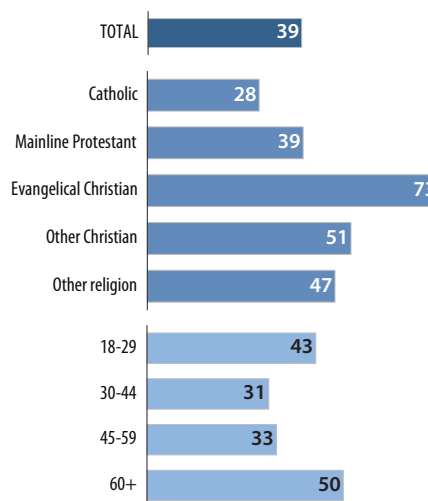
IMPORTANCE OF RELIGION IN ONE'S LIFE. In addition to attending services, the personal importance placed on religion among those with an affiliation remains strong. Four in ten (39%) Canadians with a religious affiliation say religion is a very important part of their life, with another three in ten (32%) who say it is somewhat important, and a similar proportion saying not very (19%) or not at all (10%) important.

Personal importance of religion varies noticeably across the population. Strong importance is most widely expressed by Evangelical (73%) and other (51%) Christians, but also among non-European immigrants (66%) and allophones (68%), in sharp contrast with Catholics (28%) and francophones (17%). Religion is also more likely to be personally important among residents of the Prairies, and those with less education and income.

Across age cohorts, Canadians aged 60 and over are most likely to say religion is very important, but youth are not far behind; it is those aged 30 to 59 who are least apt to share this view.

Religion is very important part of your life

By religious affiliation and age 2011



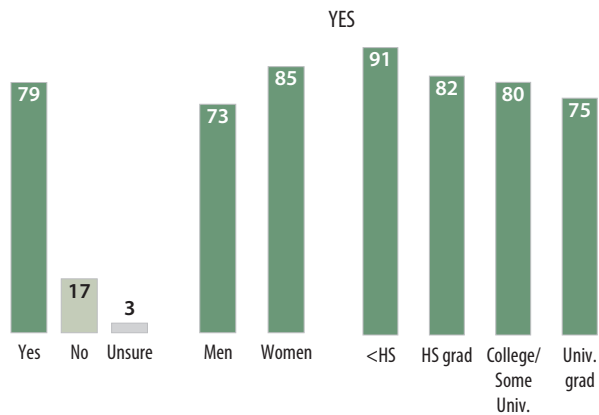
BELIEF IN GOD. Apart from religion, do Canadians – religious or not – believe in God or a universal spirit? Eight in ten (79%) say they do, compared with 17 percent who do not, and another three percent who are not quite sure. Such belief is expressed by 90 percent or more among followers of Christian denominations, compared with 81 percent among non-Christian followers, and even claims a small majority (53%) of those who have no religious affiliation.

Like personal importance of religion, belief in God or a universal life spirit is most widespread among non-European immigrants and Canadians with lower levels of education and income, as well as among women, and those aged 45 years and older.

While belief in God or a universal spirit among Canadians is widespread, they do not approach the U.S. standard: 92 percent of Americans believe in God or a universal spirit, and 71 percent are “absolutely certain” in their belief (based on a 2008 Pew Center survey).

Belief in God or a universal spirit?

By gender and education 2011



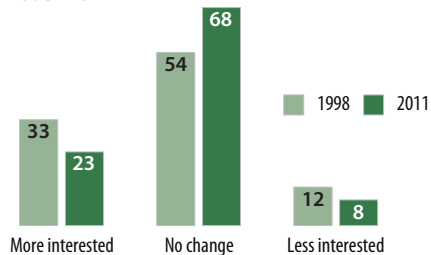
INTEREST IN SPIRITUALITY. Declining affiliation with organized religion over the past decade or so may well be giving way to growing interest in spirituality manifested in other ways, but such a trend is not apparent in the current data. One in four (23%) Canadians say they have become more interested in spiritual matters over the past five years, but this proportion is now lower than it was in 1998 (when 33% reported such increased interest). Over the same period, a small and declining proportion (8%, down 4 points) report less interest than before, while an increasing majority (68%, up 14) indicate their level of interest in spiritual matters has not changed since five years ago.

Since 1998, renewed interest in spirituality has declined across all strata of the population, but most noticeably among the university educated, women, and residents of Quebec and B.C. In 2011, increased interest in spirituality is most widely reported among Evangelical (47%) and “other” (41%) Christians, and least so among those without a religious affiliation (16%) and Catholics (19%).

While Canadian youth (18 to 29) are least likely to have a religious affiliation, they are more likely than older cohorts to report a growing interest in spirituality.

More or less interested in spiritual matters than five years ago

1998 - 2011



Religion in a social context

IMPORTANCE OF RELIGION TO CANADIANS

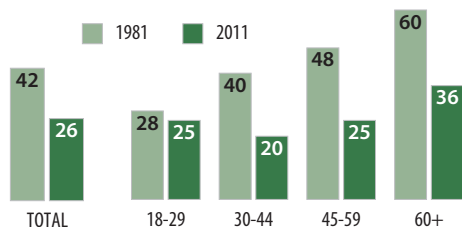
GENERALLY. Apart from their own personal lives, how do Canadians view the importance of religious practice in the moral and ethical life of Canadians generally? Most believe religion is in fact important, but this view is much less strongly held than it was 30 years ago (not surprising, given declining rates of religious affiliation).

One in four (26%) believe religion today is very important in the moral/ethical lives of Canadians (down 16 points from 1981), with another 35 percent saying this is somewhat important (down 1), and a similar proportion who believe it is not very (27%) or not at all (9%) important (up 17).

The importance placed on religious practice among Canadians is closely linked to people's own personal connection. Strong importance is most widely identified by Evangelical (66%) and other (48%) Christians, and least so by Quebecers (11%). Canadians aged 60 plus continue to be the generation most likely to say that religion is very important in this country, but the gap with today's youth has narrowed considerably over the past 30 years: Canadians aged 18 to 29 are as likely as they were in 1981 to consider religion to be very important to the population, while this view has declined significantly among older cohorts.

Religious practice is very important in the moral/ethical lives of Canadians

By age 1981 - 2011



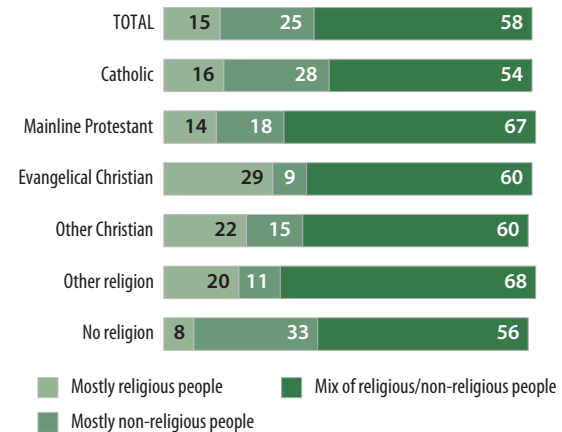
INTERACTION BETWEEN RELIGIOUS AND NON-RELIGIOUS.

One question not yet explored in research is the extent to which religious and non-religious Canadians mix with each other or stick with their own kind when it comes to family and socializing. Results from Focus Canada reveal that a majority (58%) of Canadians report spending time with friends and family that includes a mix of people who do and do not place importance on religion. Among the remainder, 25 percent say most of their contacts are with people who do not place importance on religion (most notably in Quebec), while 15 percent say most of their friends and family make religion a priority (notably among allophones).

Across religious groups, mainline Protestants (67%) are most likely to say they intermingle with both religious and non-religious friends and family, but this is also the case for majorities of members of other religious affiliations, as well as those who are non-religious (56%). Both Evangelical Christians and those without any religion are most apt to say they associate primarily with others in the same group.

With whom do you generally spend time?

By religious affiliation 2011



DO RELIGIOUS AND NON-RELIGIOUS CANADIANS SHARE COMMON VALUES?

While this year's Focus Canada survey reveals that religious and non-religious Canadians hold similar opinions on most of the issues explored in this survey, to what extent do Canadians feel they share values in common with those who have a different perspective on religion than their own? Is there evidence of a "values" divide between the religious and non-religious communities in this country?

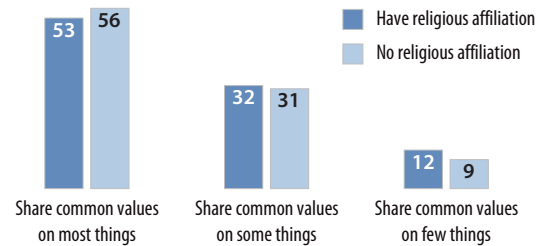
A modest majority (54%) of Canadians believe they share common values "on most things" with people whose orientation to religion is different from their own (i.e., whether they have a religious affiliation or not). Another three in ten (32%) say they share such values "on some things," while only one in ten (11%) indicate they share common values only "on a few things."

Notably, perceptions of sharing most values in common are equally likely among those who are religious (53%) and those who are not (56%).

Across religious groups, followers of non-Christian faiths (63%) and mainline Protestants (60%) are most likely to say they share common values on most things with non-religious Canadians, while this view is less prevalent among Evangelical Christians (39%, with a plurality saying they share such values "on some things"). Education appears to be among the strongest influences on this issue: As education level rises, so does the belief that one shares much in common with those with a different orientation to religion (and this relationship applies equally to religious and non-religious Canadians).

Do you share common values with those who place a different perspective on religion?

By religious or not 2011





Focus Canada 2011

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