

LOOKING BACKWARD, LOOKING FORWARD: PART 1

FIVE BIG FORCES SHAPING OUR SOCIETY

JANUARY 1, 2013

Introduction

On the cusp of another year, it is customary to take stock of the past and what it might mean for the future. There is an ample inventory of newsmakers, events and personalities assembled by the media and pundits. What I wanted to do here is look beyond these more specific things and look for the broader social forces producing really important changes in our society and our future. To qualify for this list, the forces must be beyond the obvious news of the day and they must be operating in ways that are either largely hidden from mainstream discussion or even working in ways opposite to the received wisdom. Another feature which will distinguish this list is that there is at least some empirical evidence supporting the contention that these are crucial forces. All of these forces are rooted in longer term trends and have implications for the foreseeable future. While these five forces are by no means discrete nor are they an exhaustive list of the engines of our future, I believe they are all either misunderstood or not receiving attention commensurate with their importance to our lives. These forces are rooted largely in the realm of culture, social organization and the economy. In our wrap up, we will relate these forces back to the current state of politics and why the political realm is increasingly incapable of recognizing let alone solving the critical challenges of our time.

In Part 1 of this series, we look at Canada's shifting class structure.

Force One: A Shrinking Middle Class and an Increasingly Isolated Über Affluent

Is this the beginning of the End of Progress?

Discussions of class structure and class tensions are hardly the mainstream of year end reflection. Yes we see concerns with the “middle class” have now become a mainstay of political leaders in Canada and the United States; in a way that resembles the recent rush to “family” as the key to political triumph. Beyond the typical bromides about the importance of a healthy middle class and how they need to find their lives affordable and optimistic again, there are some truly profound shifts going on. These movements are by no means healthy and taken together may spell nothing less than a deep rupture in the notion of inevitable progress which has underpinned the miracle of liberal capitalism since it emerged in the eighteenth century.

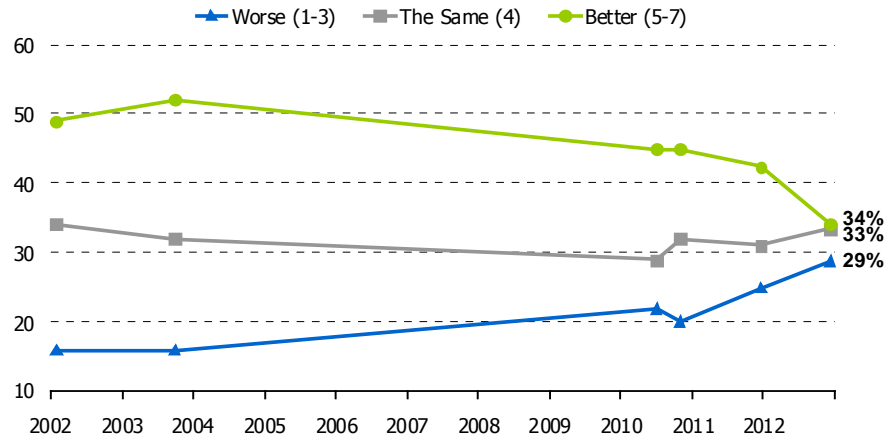
Despite the glib pronouncements of an end of history, the death of state socialism and the final triumph of the West, which were pervasive themes in the late nineties, there are now grave doubts about the present and future of the advanced western economies. The American and Canadian dreams of a better future extracted from hard work and ingenuity are fading and being replaced with a grimmer sense that not only are we not doing better than our parents but that the next generation will confront a starkly darker future. Whatever meagre profits do emanate from stagnant western economies are increasingly appropriated by a tiny cadre of über rich who don’t really participate in the mainstream of society.

The fraying of the progress ethic should be of grave concern to all of us. Max Weber argued that it was the Protestant ethic which produced the spirit of capitalism¹. This ethic transformed into a secular dream of progress that fuelled the unimaginable ascendance of the West. If modern citizens truly believe that progress is over, the Western day in the sun is completed and that the best we can do is hunker down in the vain hope that this somehow will fix itself; this belief will become part of a vicious circle and a self fulfilling prophecy.

¹ Weber, Max, and Talcott Parsons. “*The Protestant Ethic and the Spirit of Capitalism*”. New York : Scribner (NY), 1930. Print.

Figure 1-1: Long-term personal financial outlook

Q. Thinking ahead over the next five years or so, do you think your personal financial situation will be better or worse than it is today?



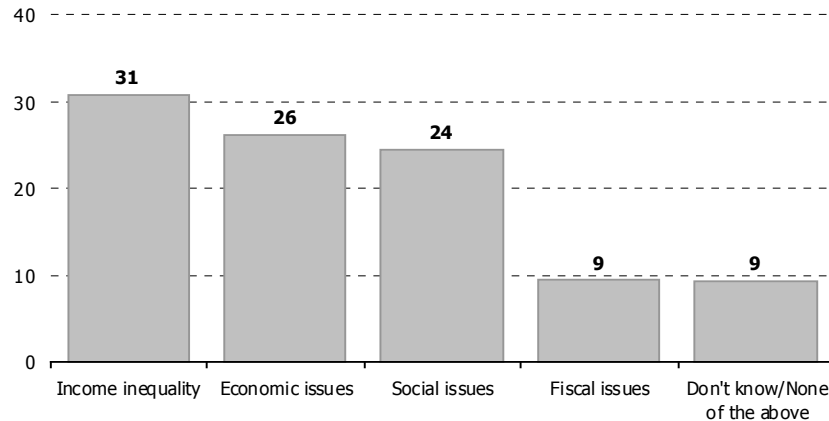
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BASE: Canadians; most recent data point November 20 – December 3, 2012 (n=5,433)

And while the ascendance of the BRIC powers (Brazil, Russia, India, and China), the stagnation of Western economies and unprecedented concentration of wealth are realities, the end of Western salience is hardly a manifest destiny. What is more disturbing than the challenges we confront is the collective despair we see in our tracking of public mood. Looking at Figure 1-1, we see that the exuberant optimism which defined the close of the twentieth century in Canada has given way to pessimism and even resignation that has slowly and steadily evolved over the past decade. The evidence is clear that economic outlook is on a slow and steady downward cycle to the point that it many fear this slide will become a maelstrom. The main economic policy offerings of the political world do not seem to have arrested this erosion and may well be seen as part of the problem.

Figure 1-2: Most important issue for discussion

Q. Which of the following do you think should be the most important issue in discussions about Canada's future? Should it be: 1) social issues like health and education; 2) issues related to the economy like economic growth and jobs; 3) Fiscal issues like taxes and debt; 4) Issues such as the growing gap between rich and poor; or 5) none of these?



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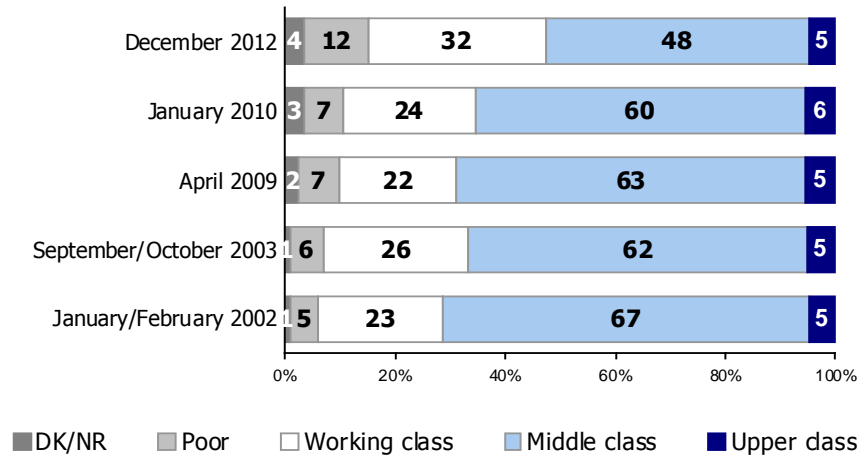
BASE: Canadians; February 21-28, 2012 (n=3,699)

Many claim that this sense of falling backward is neither unique nor particularly troublesome. As our research has shown in time series the first point isn't true and the latter response seems a rather blasé attitude to a converging set of bleak economic outlook indicators. We have speculated that the rising economic success of non Western nations, the failure of Western-US foreign policies in the Middle East and rising signs of fiscal and debt crises have all contributed to this malaise. The other key factor is rising inequality and a failing middle class. Our evidence has shown that as economic issues have become the dominant concerns for Canadians they are for the first time in our research twinned at the pinnacle of public issues with blended concerns about fairness and inequality (see Figure 1-2). This is not the traditional and more modest concerns we have seen about the gap between the rich and poor. The new and more potent linkage is the gap between the über rich and everyone else. Nowhere is this dynamic more evident than in what can only be described as the crisis of the middle class.

The middle class has always been by far the most popular self-defined class location in upper North America; one of the reasons it is such a popular political target. The twentieth century ascension of the USA to the "hyper power" status it enjoyed as little as a decade ago was largely the culmination of an unprecedented period of middle class ascendance. This probably began in the origins of that nation, but most clearly expressed itself in the expansionary period which followed the great depression and continued almost uninterrupted till the close of the twentieth century. Canada largely followed in lockstep and it was not unusual in the sixties and seventies to see Canada and the USA at the top of the standard of living charts (they are now well down that list and have been so for some time).

Figure 1-3: Tracking self-rated social class

Q. Would you describe you and your household as poor, working class, middle class, or upper class?

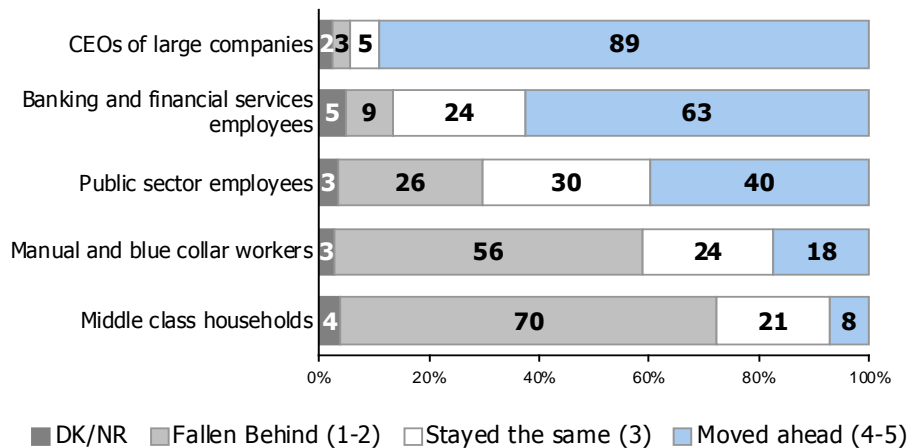


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BASE: Canadians; most recent data point November 20 – December 3, 2012 (n=5,433)

Figure 1-4: Change in well-being

Q. Do you believe the following groups have moved ahead, fallen behind, or stayed the same over the last 25 years?



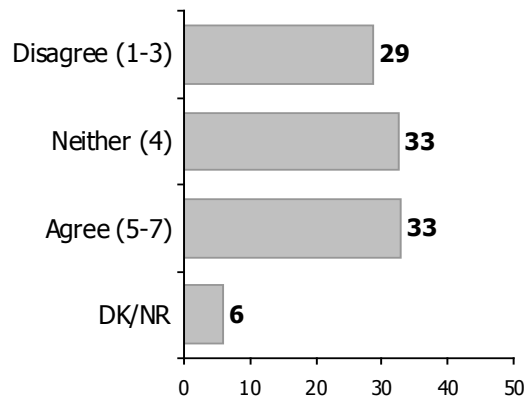
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BASE: Canadians; November 20-29, 2012 (n=1,181)

In our tracking over the past decade or so we have seen something new and important happening to that category of self defined middle class. The middle two-thirds who called themselves middle class has now make up less than half of the population (see Figure 1-3). Moreover, there is a virtual public consensus that over the past generation no class has fallen more steeply from economic grace than the beleaguered and shrinking middle class (see Figure 1-4). To put this as simply as possible, the middle class is shrinking, pessimistic and convinced that it is the clear loser in the economic reordering of the last twenty five years.

Figure 1-5: Impact of inequality on work ethic

Q. Please rate the extent to which you agree or disagree with the following statement: "The growing concentration of wealth among the richest Canadians has a strong demotivating effect on others to work hard and apply their best efforts".



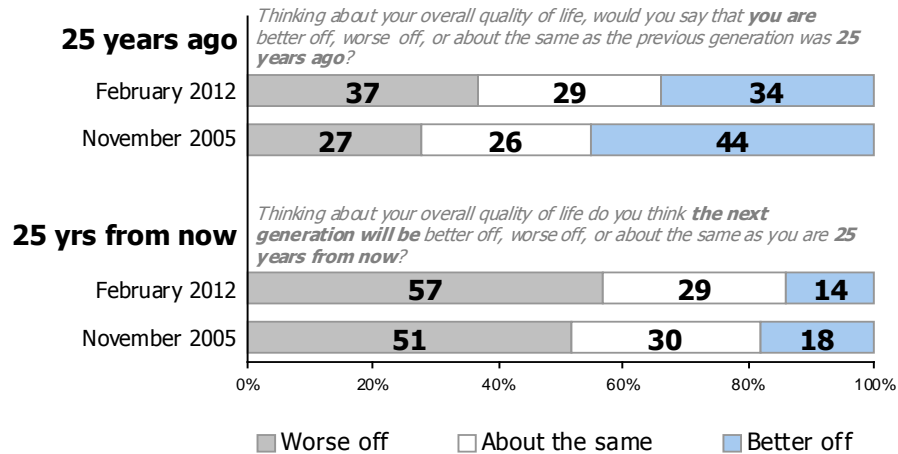
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BASE: Canadians; November 20 – December 3, 2012 (n=5,433)

In analysing why societies fail, Daron Acemođlu has a very insightful theory that the harbinger of societal failure (from greatness) is the shift from an "inclusive" to an "extractive" economy². The burgeoning of upper North America's middle class in the twentieth century is the example par excellence of a successful inclusive economy. Among other examples, Acemođlu shows how Venice went from backwater to world powerhouse and back to a sterile urban museum in waiting when it shifted from an inclusive to an extractive economy (see the NYT article on the self destruction of the one percent for an excellent synopsis of this point). The diminution of taxes and public services, the rise of the one percent has seen a similar shrinking and relative decline in the North American economy and could be a chilling harbinger for our future economic well being.

² Acemoglu, Daron, and James Robinson. "Why Nations Fail the Origins of Power, Prosperity and Poverty", New York: CROWN GROUP (NY), 2012. Print.

Figure 1-6: Perceived changes in quality of life over time



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BASE: Canadians; February 21-28, 2012 (n=3,699, half-sample each)

There are few if any modern examples of economic and societal success which do not see a rising, optimistic and growing middle class. These features are common to all of the modern emerging Asian powerhouses. In Canada, we have a shrinking, stagnant, and pessimistic middle class which has lost faith in the ethic of progress. Uncorrected, this will lead to inevitable further decline. The fact that only 14 per cent of the public think their children will inherit a better world (see Figure 1-6) underlines just how staunch the challenge is. This dark future is by no means inevitable but the dominant challenge of our time is to reverse this infectious belief that progress is over and produce a vibrant new liberal capitalism for the twenty first century. Growing and invigorating the dormant middle class is task one in any blueprint to a brighter future.

Detailed Tables

| Long-Term Financial Outlook | | | | | | |
|---|-------------|--------------|--------------|-----------|-------------|-----------------------|
| <i>Q. Thinking ahead over the next five years or so, do you think your personal financial situation will be better or worse than it is today?</i> | | | | | | |
| | Worse (1-3) | The Same (4) | Better (5-7) | DK/NR | Sample Size | Margin of Error (+/-) |
| NATIONALLY | 29% | 33% | 34% | 4% | 5433 | 1.3 |
| REGION | | | | | | |
| British Columbia | 32% | 32% | 35% | 2% | 570 | 4.1 |
| Alberta | 20% | 30% | 41% | 8% | 469 | 4.5 |
| Saskatchewan | 24% | 27% | 37% | 12% | 254 | 6.2 |
| Manitoba | 25% | 29% | 36% | 11% | 222 | 6.6 |
| Ontario | 28% | 34% | 36% | 2% | 1694 | 2.4 |
| Quebec | 33% | 36% | 28% | 3% | 1883 | 2.3 |
| Atlantic Canada | 32% | 32% | 33% | 3% | 328 | 5.4 |
| GENDER | | | | | | |
| Male | 29% | 31% | 39% | 1% | 2530 | 2 |
| Female | 30% | 37% | 31% | 1% | 2743 | 1.9 |
| AGE | | | | | | |
| <25 | 31% | 19% | 48% | 3% | 260 | 6.1 |
| 25-44 | 25% | 27% | 47% | 2% | 1439 | 2.6 |
| 45-64 | 33% | 36% | 29% | 1% | 2166 | 2.1 |
| 65+ | 29% | 54% | 16% | 1% | 1402 | 2.6 |
| EDUCATION | | | | | | |
| High school or less | 34% | 37% | 27% | 1% | 1723 | 2.4 |
| College or CEGEP | 31% | 33% | 35% | 1% | 1695 | 2.4 |
| University or higher | 24% | 33% | 42% | 2% | 1837 | 2.3 |
| CURRENT VOTE INTENTION | | | | | | |
| Conservative Party | 19% | 34% | 45% | 1% | 1384 | 2.6 |
| NDP | 34% | 34% | 31% | 1% | 1128 | 2.9 |
| Liberal Party | 29% | 38% | 32% | 1% | 1169 | 2.9 |
| Green Party | 33% | 28% | 37% | 2% | 325 | 5.4 |
| Bloc Quebecois | 37% | 33% | 29% | 1% | 431 | 4.7 |
| Other | 44% | 18% | 37% | 1% | 111 | 9.3 |



Most Important Issue for Discussion

Q. Which of the following do you think should be the most important issue in discussions about Canada's future? Should it be: 1) social issues like health and education; 2) issues related to the economy like economic growth and jobs; 3) Fiscal issues like taxes and debt; 4) Issues such as the growing gap between rich and poor; or 5) none of these?

| | Social issues | Economic issues | Fiscal issues | Income inequality | Don't know/None of the these | Sample Size | Margin of Error (+/-) |
|-------------------------------|---------------|-----------------|---------------|-------------------|------------------------------|-------------|-----------------------|
| NATIONALLY | 24% | 26% | 9% | 31% | 9% | 3699 | 1.6 |
| REGION | | | | | | | |
| British Columbia | 26% | 24% | 8% | 34% | 7% | 678 | 3.8 |
| Alberta | 26% | 23% | 14% | 28% | 8% | 461 | 4.6 |
| Saskatchewan/Manitoba | 26% | 21% | 10% | 32% | 11% | 229 | 6.5 |
| Ontario | 21% | 32% | 9% | 30% | 9% | 821 | 3.4 |
| Quebec | 28% | 20% | 9% | 31% | 11% | 960 | 3.2 |
| Atlantic Canada | 24% | 27% | 9% | 32% | 9% | 550 | 4.2 |
| GENDER | | | | | | | |
| Male | 19% | 29% | 12% | 32% | 8% | 1750 | 2.3 |
| Female | 30% | 23% | 7% | 30% | 10% | 1949 | 2.2 |
| AGE | | | | | | | |
| <25 | 31% | 27% | 9% | 24% | 9% | 207 | 6.8 |
| 25-44 | 25% | 24% | 10% | 31% | 9% | 932 | 3.2 |
| 45-64 | 21% | 27% | 10% | 34% | 9% | 1464 | 2.6 |
| 65+ | 25% | 27% | 8% | 29% | 10% | 1096 | 3.0 |
| EDUCATION | | | | | | | |
| High school or less | 23% | 25% | 10% | 30% | 11% | 1188 | 2.8 |
| College or CEGEP | 25% | 25% | 9% | 32% | 9% | 1253 | 2.8 |
| University or higher | 25% | 28% | 9% | 30% | 8% | 1258 | 2.8 |
| CURRENT VOTE INTENTION | | | | | | | |
| Conservative Party of Canada | 16% | 40% | 16% | 22% | 6% | 1069 | 3.0 |
| NDP | 29% | 18% | 6% | 39% | 8% | 916 | 3.2 |
| Liberal Party of Canada | 25% | 30% | 8% | 30% | 7% | 694 | 3.7 |
| Green Party | 28% | 16% | 3% | 42% | 10% | 220 | 6.6 |
| Bloc Quebecois | 35% | 10% | 7% | 36% | 13% | 196 | 7.0 |
| Other | 26% | 19% | 9% | 31% | 14% | 94 | 10.1 |
| Undecided | 29% | 18% | 8% | 26% | 19% | 432 | 4.7 |



Self-Rated Social Class

Q. Would you describe you and your household as poor, working class, middle class or upper class?

| | Poor | Working class | Middle class | Upper class | DK/NR | Sample Size | Margin of Error (+/-) |
|-------------------------------|------------|---------------|--------------|-------------|-----------|-------------|-----------------------|
| NATIONALLY | 12% | 32% | 48% | 5% | 4% | 5433 | 1.3 |
| REGION | | | | | | | |
| British Columbia | 15% | 34% | 46% | 4% | 1% | 570 | 4.1 |
| Alberta | 7% | 33% | 48% | 5% | 7% | 469 | 4.5 |
| Saskatchewan | 10% | 32% | 41% | 4% | 13% | 254 | 6.2 |
| Manitoba | 10% | 35% | 41% | 3% | 11% | 222 | 6.6 |
| Ontario | 11% | 33% | 49% | 4% | 2% | 1694 | 2.4 |
| Quebec | 13% | 27% | 52% | 7% | 2% | 1883 | 2.3 |
| Atlantic Canada | 13% | 39% | 41% | 4% | 3% | 328 | 5.4 |
| GENDER | | | | | | | |
| Male | 11% | 31% | 52% | 6% | 1% | 2530 | 2.0 |
| Female | 13% | 35% | 47% | 4% | 1% | 2743 | 1.9 |
| AGE | | | | | | | |
| <25 | 15% | 30% | 46% | 7% | 2% | 260 | 6.1 |
| 25-44 | 11% | 34% | 49% | 5% | 1% | 1439 | 2.6 |
| 45-64 | 12% | 35% | 47% | 5% | 1% | 2166 | 2.1 |
| 65+ | 11% | 29% | 56% | 4% | 1% | 1402 | 2.6 |
| EDUCATION | | | | | | | |
| High school or less | 20% | 42% | 34% | 4% | 1% | 1723 | 2.4 |
| College or CEGEP | 12% | 40% | 44% | 3% | 1% | 1695 | 2.4 |
| University or higher | 5% | 18% | 68% | 8% | 1% | 1837 | 2.3 |
| CURRENT VOTE INTENTION | | | | | | | |
| Conservative Party | 7% | 31% | 56% | 5% | 1% | 1384 | 2.6 |
| NDP | 13% | 33% | 49% | 4% | 1% | 1128 | 2.9 |
| Liberal Party | 9% | 30% | 53% | 7% | 1% | 1169 | 2.9 |
| Green Party | 17% | 33% | 45% | 5% | 0% | 325 | 5.4 |
| Bloc Quebecois | 15% | 23% | 56% | 6% | 0% | 431 | 4.7 |
| Other | 21% | 41% | 31% | 6% | 2% | 111 | 9.3 |



Change in Well-Being of CEOs of large companies

Q. Do you believe the following groups have moved ahead, fallen behind, or stayed the same over the last 25 years?

CEOs of large companies

| | Fallen Behind (1-2) | Stayed the same (3) | Moved ahead (4-5) | DK/NR | Sample Size | Margin of Error (+/-) |
|-------------------------------|---------------------|---------------------|-------------------|-----------|-------------|-----------------------|
| NATIONALLY | 3% | 5% | 89% | 2% | 1181 | 2.9 |
| REGION | | | | | | |
| British Columbia | 2% | 7% | 91% | 1% | 141 | 8.3 |
| Alberta | 1% | 9% | 91% | 0% | 125 | 8.8 |
| Saskatchewan | 0% | 3% | 94% | 3% | 35 | 16.6 |
| Manitoba | 3% | 2% | 91% | 5% | 41 | 15.3 |
| Ontario | 2% | 3% | 93% | 2% | 509 | 4.3 |
| Quebec | 9% | 8% | 78% | 4% | 218 | 6.6 |
| Atlantic Canada | 1% | 5% | 92% | 2% | 106 | 9.5 |
| GENDER | | | | | | |
| Male | 2% | 4% | 92% | 2% | 688 | 3.7 |
| Female | 4% | 7% | 85% | 3% | 493 | 4.4 |
| AGE | | | | | | |
| <25 | 6% | 5% | 87% | 2% | 73 | 11.5 |
| 25-44 | 3% | 9% | 86% | 2% | 387 | 5.0 |
| 45-64 | 3% | 4% | 91% | 3% | 501 | 4.4 |
| 65+ | 2% | 2% | 94% | 3% | 179 | 7.3 |
| EDUCATION | | | | | | |
| High school or less | 3% | 7% | 84% | 6% | 309 | 5.6 |
| College or CEGEP | 4% | 5% | 90% | 1% | 429 | 4.7 |
| University or higher | 3% | 4% | 91% | 2% | 443 | 4.7 |
| CURRENT VOTE INTENTION | | | | | | |
| Conservative Party | 2% | 7% | 90% | 3% | 334 | 5.4 |
| NDP | 4% | 5% | 90% | 1% | 313 | 5.5 |
| Liberal Party | 3% | 4% | 90% | 1% | 250 | 6.2 |
| Green Party | 3% | 3% | 94% | 0% | 70 | 11.7 |
| Bloc Quebecois | 9% | 11% | 76% | 4% | 49 | 14.0 |
| Other | 0% | 0% | 95% | 5% | 16 | 24.5 |



Change in Well-Being of Banking and Financial Services Employees

Q. Do you believe the following groups have moved ahead, fallen behind, or stayed the same over the last 25 years?

Those who work in the banking and financial services sector

| | Fallen Behind (1-2) | Stayed the same (3) | Moved ahead (4-5) | DK/NR | Sample Size | Margin of Error (+/-) |
|-------------------------------|---------------------|---------------------|-------------------|-----------|-------------|-----------------------|
| NATIONALLY | 9% | 24% | 63% | 5% | 1181 | 2.9 |
| REGION | | | | | | |
| British Columbia | 9% | 28% | 60% | 3% | 141 | 8.3 |
| Alberta | 6% | 29% | 62% | 3% | 125 | 8.8 |
| Saskatchewan | 2% | 14% | 79% | 5% | 35 | 16.6 |
| Manitoba | 5% | 40% | 52% | 3% | 41 | 15.3 |
| Ontario | 7% | 22% | 65% | 5% | 509 | 4.3 |
| Quebec | 13% | 22% | 58% | 7% | 218 | 6.6 |
| Atlantic Canada | 5% | 21% | 69% | 5% | 106 | 9.5 |
| GENDER | | | | | | |
| Male | 8% | 23% | 66% | 3% | 688 | 3.7 |
| Female | 9% | 25% | 59% | 7% | 493 | 4.4 |
| AGE | | | | | | |
| <25 | 5% | 22% | 69% | 4% | 73 | 11.5 |
| 25-44 | 9% | 25% | 62% | 4% | 387 | 5.0 |
| 45-64 | 9% | 25% | 60% | 6% | 501 | 4.4 |
| 65+ | 5% | 24% | 66% | 6% | 179 | 7.3 |
| EDUCATION | | | | | | |
| High school or less | 8% | 25% | 60% | 7% | 309 | 5.6 |
| College or CEGEP | 10% | 26% | 60% | 4% | 429 | 4.7 |
| University or higher | 7% | 22% | 67% | 4% | 443 | 4.7 |
| CURRENT VOTE INTENTION | | | | | | |
| Conservative Party | 6% | 28% | 64% | 3% | 334 | 5.4 |
| NDP | 8% | 23% | 65% | 5% | 313 | 5.5 |
| Liberal Party | 10% | 23% | 62% | 5% | 250 | 6.2 |
| Green Party | 7% | 20% | 73% | 1% | 70 | 11.7 |
| Bloc Quebecois | 12% | 23% | 63% | 2% | 49 | 14.0 |
| Other | 9% | 20% | 66% | 5% | 16 | 24.5 |



Change in Well-Being of Public Sector Employees

Q. Do you believe the following groups have moved ahead, fallen behind, or stayed the same over the last 25 years?

Those who work in the public sector

| | Fallen Behind (1-2) | Stayed the same (3) | Moved ahead (4-5) | DK/NR | Sample Size | Margin of Error (+/-) |
|-------------------------------|---------------------|---------------------|-------------------|-----------|-------------|-----------------------|
| NATIONALLY | 26% | 30% | 40% | 3% | 1181 | 2.9 |
| REGION | | | | | | |
| British Columbia | 36% | 24% | 39% | 1% | 141 | 8.3 |
| Alberta | 31% | 30% | 37% | 3% | 125 | 8.8 |
| Saskatchewan | 23% | 35% | 40% | 3% | 35 | 16.6 |
| Manitoba | 29% | 35% | 31% | 5% | 41 | 15.3 |
| Ontario | 24% | 29% | 44% | 3% | 509 | 4.3 |
| Quebec | 22% | 32% | 43% | 4% | 218 | 6.6 |
| Atlantic Canada | 33% | 38% | 25% | 5% | 106 | 9.5 |
| GENDER | | | | | | |
| Male | 24% | 30% | 44% | 2% | 688 | 3.7 |
| Female | 29% | 31% | 36% | 5% | 493 | 4.4 |
| AGE | | | | | | |
| <25 | 26% | 37% | 32% | 5% | 73 | 11.5 |
| 25-44 | 28% | 31% | 37% | 4% | 387 | 5.0 |
| 45-64 | 25% | 30% | 43% | 2% | 501 | 4.4 |
| 65+ | 22% | 23% | 52% | 3% | 179 | 7.3 |
| EDUCATION | | | | | | |
| High school or less | 24% | 30% | 38% | 8% | 309 | 5.6 |
| College or CEGEP | 26% | 30% | 44% | 1% | 429 | 4.7 |
| University or higher | 28% | 31% | 38% | 3% | 443 | 4.7 |
| CURRENT VOTE INTENTION | | | | | | |
| Conservative Party | 12% | 29% | 57% | 3% | 334 | 5.4 |
| NDP | 40% | 29% | 29% | 2% | 313 | 5.5 |
| Liberal Party | 27% | 30% | 40% | 3% | 250 | 6.2 |
| Green Party | 26% | 38% | 36% | 0% | 70 | 11.7 |
| Bloc Quebecois | 23% | 34% | 41% | 2% | 49 | 14.0 |
| Other | 26% | 42% | 27% | 5% | 16 | 24.5 |



Change in Well-Being of Manual and Blue Collar Workers

Q. Do you believe the following groups have moved ahead, fallen behind, or stayed the same over the last 25 years?

Manual and Blue Collar Workers

| | Fallen Behind (1-2) | Stayed the same (3) | Moved ahead (4-5) | DK/NR | Sample Size | Margin of Error (+/-) |
|-------------------------------|---------------------|---------------------|-------------------|-----------|-------------|-----------------------|
| NATIONALLY | 56% | 24% | 18% | 3% | 1181 | 2.9 |
| REGION | | | | | | |
| British Columbia | 70% | 18% | 10% | 1% | 141 | 8.3 |
| Alberta | 48% | 30% | 21% | 1% | 125 | 8.8 |
| Saskatchewan | 59% | 20% | 19% | 3% | 35 | 16.6 |
| Manitoba | 46% | 26% | 23% | 5% | 41 | 15.3 |
| Ontario | 66% | 21% | 11% | 2% | 509 | 4.3 |
| Quebec | 31% | 31% | 32% | 6% | 218 | 6.6 |
| Atlantic Canada | 68% | 19% | 11% | 3% | 106 | 9.5 |
| GENDER | | | | | | |
| Male | 59% | 24% | 15% | 2% | 688 | 3.7 |
| Female | 52% | 24% | 20% | 4% | 493 | 4.4 |
| AGE | | | | | | |
| <25 | 59% | 21% | 13% | 7% | 73 | 11.5 |
| 25-44 | 50% | 25% | 23% | 2% | 387 | 5.0 |
| 45-64 | 61% | 23% | 14% | 2% | 501 | 4.4 |
| 65+ | 50% | 31% | 15% | 4% | 179 | 7.3 |
| EDUCATION | | | | | | |
| High school or less | 50% | 27% | 16% | 6% | 309 | 5.6 |
| College or CEGEP | 58% | 26% | 15% | 1% | 429 | 4.7 |
| University or higher | 57% | 20% | 21% | 2% | 443 | 4.7 |
| CURRENT VOTE INTENTION | | | | | | |
| Conservative Party | 47% | 32% | 20% | 2% | 334 | 5.4 |
| NDP | 63% | 20% | 14% | 3% | 313 | 5.5 |
| Liberal Party | 62% | 19% | 16% | 3% | 250 | 6.2 |
| Green Party | 68% | 16% | 15% | 0% | 70 | 11.7 |
| Bloc Quebecois | 38% | 35% | 27% | 0% | 49 | 14.0 |
| Other | 54% | 9% | 32% | 5% | 16 | 24.5 |



Change in Well-Being of Middle Class Households

Q. Do you believe the following groups have moved ahead, fallen behind, or stayed the same over the last 25 years?

Middle class households

| | Fallen Behind (1-2) | Stayed the same (3) | Moved ahead (4-5) | DK/NR | Sample Size | Margin of Error (+/-) |
|-------------------------------|---------------------|---------------------|-------------------|-----------|-------------|-----------------------|
| NATIONALLY | 70% | 21% | 8% | 2% | 1181 | 2.9 |
| REGION | | | | | | |
| British Columbia | 77% | 15% | 7% | 2% | 141 | 8.3 |
| Alberta | 62% | 27% | 11% | 0% | 125 | 8.8 |
| Saskatchewan | 59% | 25% | 11% | 5% | 35 | 16.6 |
| Manitoba | 65% | 27% | 5% | 3% | 41 | 15.3 |
| Ontario | 72% | 20% | 7% | 2% | 509 | 4.3 |
| Quebec | 69% | 19% | 9% | 3% | 218 | 6.6 |
| Atlantic Canada | 65% | 26% | 6% | 3% | 106 | 9.5 |
| GENDER | | | | | | |
| Male | 69% | 24% | 6% | 1% | 688 | 3.7 |
| Female | 71% | 17% | 9% | 3% | 493 | 4.4 |
| AGE | | | | | | |
| <25 | 70% | 22% | 6% | 2% | 73 | 11.5 |
| 25-44 | 67% | 21% | 10% | 2% | 387 | 5.0 |
| 45-64 | 73% | 20% | 5% | 2% | 501 | 4.4 |
| 65+ | 66% | 23% | 9% | 2% | 179 | 7.3 |
| EDUCATION | | | | | | |
| High school or less | 65% | 21% | 9% | 5% | 309 | 5.6 |
| College or CEGEP | 74% | 21% | 6% | 0% | 429 | 4.7 |
| University or higher | 69% | 21% | 9% | 2% | 443 | 4.7 |
| CURRENT VOTE INTENTION | | | | | | |
| Conservative Party | 55% | 31% | 13% | 1% | 334 | 5.4 |
| NDP | 82% | 13% | 4% | 1% | 313 | 5.5 |
| Liberal Party | 73% | 21% | 5% | 2% | 250 | 6.2 |
| Green Party | 75% | 19% | 5% | 1% | 70 | 11.7 |
| Bloc Quebecois | 77% | 14% | 8% | 2% | 49 | 14.0 |
| Other | 74% | 9% | 12% | 5% | 16 | 24.5 |



Impact of Inequality on Work Ethic

Q. Please rate the extent to which you agree or disagree with the following statement: "The growing concentration of wealth among the richest Canadians has a strong demotivating effect on others to work hard and apply their best efforts."

| | Disagree (1-3) | Neither (4) | Agree (5-7) | DK/NR | Sample Size | Margin of Error (+/-) |
|-------------------------------|----------------|-------------|-------------|-----------|-------------|-----------------------|
| NATIONALLY | 29% | 33% | 33% | 6% | 5433 | 1.3 |
| REGION | | | | | | |
| British Columbia | 35% | 30% | 31% | 4% | 570 | 4.1 |
| Alberta | 30% | 34% | 26% | 10% | 469 | 4.5 |
| Saskatchewan | 25% | 34% | 26% | 16% | 254 | 6.2 |
| Manitoba | 29% | 32% | 28% | 11% | 222 | 6.6 |
| Ontario | 32% | 31% | 33% | 4% | 1694 | 2.4 |
| Quebec | 21% | 34% | 39% | 6% | 1883 | 2.3 |
| Atlantic Canada | 26% | 39% | 29% | 6% | 328 | 5.4 |
| GENDER | | | | | | |
| Male | 33% | 30% | 36% | 2% | 2530 | 2.0 |
| Female | 27% | 37% | 32% | 5% | 2743 | 1.9 |
| AGE | | | | | | |
| <25 | 33% | 28% | 34% | 5% | 260 | 6.1 |
| 25-44 | 30% | 29% | 37% | 4% | 1439 | 2.6 |
| 45-64 | 29% | 35% | 33% | 3% | 2166 | 2.1 |
| 65+ | 26% | 42% | 30% | 2% | 1402 | 2.6 |
| EDUCATION | | | | | | |
| High school or less | 28% | 41% | 28% | 3% | 1723 | 2.4 |
| College or CEGEP | 27% | 33% | 35% | 5% | 1695 | 2.4 |
| University or higher | 32% | 27% | 38% | 3% | 1837 | 2.3 |
| CURRENT VOTE INTENTION | | | | | | |
| Conservative Party | 38% | 34% | 26% | 2% | 1384 | 2.6 |
| NDP | 26% | 30% | 40% | 4% | 1128 | 2.9 |
| Liberal Party | 30% | 35% | 33% | 3% | 1169 | 2.9 |
| Green Party | 27% | 29% | 41% | 3% | 325 | 5.4 |
| Bloc Quebecois | 19% | 31% | 46% | 4% | 431 | 4.7 |
| Other | 29% | 33% | 35% | 3% | 111 | 9.3 |


Perceived changes in quality of life over time (25 years ago)

Q. Thinking about your overall quality of life, would you say that you are better off, worse off, or about the same as the previous generation was 25 years ago?

| | Better off | About the same | Worse off | Sample Size | Margin of Error (+/-) |
|-------------------------------|------------|----------------|------------|-------------|-----------------------|
| NATIONALLY | 34% | 29% | 37% | 1844 | 2.3 |
| REGION | | | | | |
| British Columbia | 32% | 28% | 40% | 319 | 5.5 |
| Alberta | 41% | 28% | 31% | 229 | 6.5 |
| Saskatchewan/Manitoba | 40% | 29% | 31% | 109 | 9.4 |
| Ontario | 34% | 27% | 38% | 418 | 4.8 |
| Quebec | 29% | 35% | 36% | 476 | 4.5 |
| Atlantic Canada | 38% | 25% | 37% | 293 | 5.7 |
| GENDER | | | | | |
| Male | 33% | 28% | 39% | 880 | 3.3 |
| Female | 35% | 31% | 35% | 964 | 3.2 |
| AGE | | | | | |
| <25 | 37% | 26% | 37% | 106 | 9.5 |
| 25-44 | 29% | 26% | 45% | 450 | 4.6 |
| 45-64 | 35% | 29% | 37% | 728 | 3.6 |
| 65+ | 41% | 38% | 21% | 560 | 4.1 |
| EDUCATION | | | | | |
| High school or less | 30% | 32% | 37% | 611 | 4.0 |
| College or CEGEP | 33% | 29% | 38% | 611 | 4.0 |
| University or higher | 38% | 27% | 35% | 622 | 3.9 |
| CURRENT VOTE INTENTION | | | | | |
| Conservative Party of Canada | 50% | 28% | 22% | 562 | 4.1 |
| NDP | 29% | 28% | 43% | 432 | 4.7 |
| Liberal Party of Canada | 35% | 30% | 36% | 342 | 5.3 |
| Green Party | 15% | 34% | 51% | 113 | 9.2 |
| Bloc Quebecois | 21% | 42% | 37% | 88 | 10.5 |
| Other | 28% | 24% | 47% | 48 | 14.1 |
| Undecided | 26% | 29% | 45% | 223 | 6.6 |


Perceived changes in quality of life over time (25 years from now)

Q. Thinking about your overall quality of life do you think the next generation will be better off, worse off, or about the same as you are 25 years from now?

| | Better off | About the same | Worse off | Sample Size | Margin of Error (+/-) |
|-------------------------------|------------|----------------|------------|-------------|-----------------------|
| NATIONALLY | 14% | 29% | 57% | 1855 | 2.3 |
| REGION | | | | | |
| British Columbia | 14% | 24% | 63% | 359 | 5.2 |
| Alberta | 11% | 29% | 60% | 232 | 6.4 |
| Saskatchewan/Manitoba | 16% | 32% | 52% | 120 | 9.0 |
| Ontario | 15% | 27% | 57% | 403 | 4.9 |
| Quebec | 13% | 35% | 52% | 484 | 4.5 |
| Atlantic Canada | 14% | 28% | 58% | 257 | 6.1 |
| GENDER | | | | | |
| Male | 16% | 30% | 54% | 870 | 3.3 |
| Female | 13% | 29% | 59% | 985 | 3.1 |
| AGE | | | | | |
| <25 | 20% | 21% | 59% | 101 | 9.8 |
| 25-44 | 14% | 27% | 59% | 482 | 4.5 |
| 45-64 | 13% | 29% | 58% | 736 | 3.6 |
| 65+ | 12% | 40% | 48% | 536 | 4.2 |
| EDUCATION | | | | | |
| High school or less | 16% | 31% | 53% | 577 | 4.1 |
| College or CEGEP | 14% | 25% | 60% | 642 | 3.9 |
| University or higher | 12% | 32% | 56% | 636 | 3.9 |
| CURRENT VOTE INTENTION | | | | | |
| Conservative Party of Canada | 19% | 36% | 45% | 507 | 4.4 |
| Liberal Party of Canada | 16% | 29% | 56% | 352 | 5.2 |
| NDP | 11% | 26% | 62% | 484 | 4.5 |
| Green Party | 11% | 20% | 69% | 107 | 9.5 |
| Bloc Quebecois | 5% | 27% | 67% | 108 | 9.4 |
| Other | 18% | 12% | 70% | 46 | 14.5 |
| Undecided | 8% | 30% | 62% | 209 | 6.8 |

Methodology

This paper draws on data collected from **four separate surveys**. Two of these surveys used Interactive Voice Response (IVR) technology, which allows respondents to enter their preferences by punching the keypad on their phone, rather than telling them to an operator.

In an effort to reduce the coverage bias of landline only RDD, we created a dual landline/cell phone RDD sampling frame for this research. As a result, we are able to reach those with a landline and cell phone, as well as cell phone only households and landline only households. This dual frame yields a near perfect unweighted distribution on age group and gender, something almost never seen with traditional landline RDD sample or interviewer-administered surveys. This methodology is not to be confused with the increasing proliferation of non-probability opt-in online panels which have recently been incorrectly reported in major national media with inappropriate margin of error estimates.

The field dates for the **first survey** are February 21-28, 2012. In total, a random sample of 3,699 Canadians aged 18 and over responded to the survey. The margin of error associated with the total sample is +/-1.6 percentage points, 19 times out of 20.

The field dates for the **second survey** are November 20 – December 3, 2012. In total, a random sample of 5,433 Canadians aged 18 and over responded to the survey (including a sub-sample of 4,548 decided and leaning voters). The margin of error associated with the total sample is +/-1.3 percentage points, 19 times out of 20.

The two remaining surveys were conducted exclusively online using EKOS' unique, hybrid online/telephone research panel, *Prob*it**. Our panel offers exhaustive coverage of the Canadian population (i.e., Internet, phone, cell phone), random recruitment (in other words, participants are recruited randomly, they do not opt themselves into our panel), and equal probability sampling. All respondents to our panel are recruited by telephone using random digit dialling and are confirmed by live interviewers. Unlike opt-in online panels, *Prob*it** supports margin of error estimates. We believe this to be the only probability-based online panel in Canada.

The field dates for the **third survey** are December 14-21, 2011. In total, 2,005 Canadians aged 18 and over responded to the survey. The margin of error associated with the total sample is +/-2.2 percentage points, 19 times out of 20.

The field dates for the **fourth survey** are November 20-29, 2012. In total, 1,181 Canadians aged 18 and over responded to the survey. The margin of error associated with the total sample is +/-2.9 percentage points, 19 times out of 20.

Please note that the margin of error increases when the results are sub-divided (i.e., error margins for sub-groups such as region, sex, age, education). All the data have been statistically weighted to ensure the samples composition reflects that of the actual population of Canada according to Census data.