

THROUGH A LENS DARKLY:

SHIFTING PUBLIC OUTLOOK ON THE ECONOMY AND SOCIAL CLASS

[Ottawa – October 10, 2017] Increasingly, the old ideological battles of left versus right are being supplanted by a new contest for the future. As Daniel Bell argued over 50 years ago, the new axis of dispute is more open versus ordered. This harkens back to classic works such as Aural Kolnai's 1938 *The War Against the West* and Karl Popper's *The Open Society and Its Enemies*. Once again, we are seeing a rise in populism, nativism, and a new search for more authoritarian or ordered solutions to what has been a protracted period of economic stagnation and decline for many.¹

The problems associated with the 'end of progress',² the decline of the middle class, and a rising identification with working class have coalesced to produce a rise of populism and greater skepticism about the virtues of an open society. Only about ten per cent of Americans³ and Canadians think the next generation will do better than them and this has weighed heavily on public outlook and is transforming the political landscape in unexpected ways such as the Brexit and Donald Trump victories (and the recent success of the far right in the recent German elections). Neo-Nazi parades, an incendiary debate about race and protest in sports, and a clear rise in hate crimes all combine to produce a very different outlook than we could have imagined as the century began. As if the challenges of restoring middle class progress and shared prosperity were not daunting enough, we now see a sharp disruption of a long period of decline in hard racial intolerance, growing skepticism of globalization and trade, heightened allergy to immigration and a desire to restore the privilege of those who are angry and despondent about having fallen out of the middle class.

What we want to examine here is the longer term patterns underpinning this new outlook and what the implications are for the politics of the future. Is racial intolerance on the rise and is it the new causal force underpinning populism? Or has racism and nativism been triggered by economic stagnation and changes in class formation?

A bleak long-term outlook on the economy as the middle class continues to shrink and fall into the working class

Whatever the merits of different concatenations of official economic data, the public remain overwhelmingly underwhelmed with the economy. This becomes very clear when looking at the evolution of economic outlook, looking both backward and forward, and where people locate

¹ EKOS Research Associates, "*Fear and Hope: Understanding the National Mood*", July 23, 2017. Available online at: goo.gl/L6HgNY

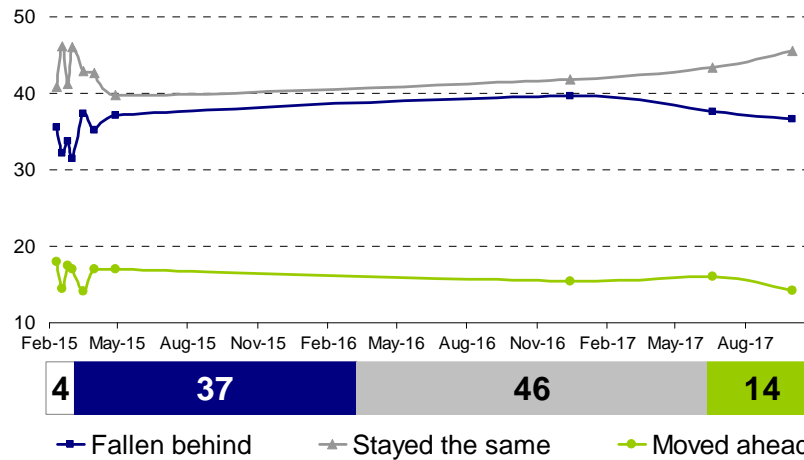
² Frank Graves, "*Canada 150: The End of Progress?*", Presentation to the Queen's Policy Review, April 27, 2017. Available online at: goo.gl/L4ECeS

³ Frank Graves, Robert Pastor, and Miguel Basáñez, "*The NAFTA Promise and the North American Reality*", Presentation to the Center for North American Studies (CNAS) and the Institutions, Law and Security Center (ILSC), October 31, 2013. Available online at: goo.gl/NEQtUz

themselves in the new class order. The celebratory Bay Street outlook on the economy contrasts sharply with the unremittingly gloomy Main Street view. No matter which tracking indicator we select, this profound disjuncture with a positive view of the economy is dominant. Let's consider how people think they are doing compared to one and five years ago, and how they think their economic outlook will be one and five years from now.

Self-rated progress (1 year)

Q. Thinking about your personal financial situation, would you say you have moved ahead, stayed the same, or fallen behind over the last YEAR?

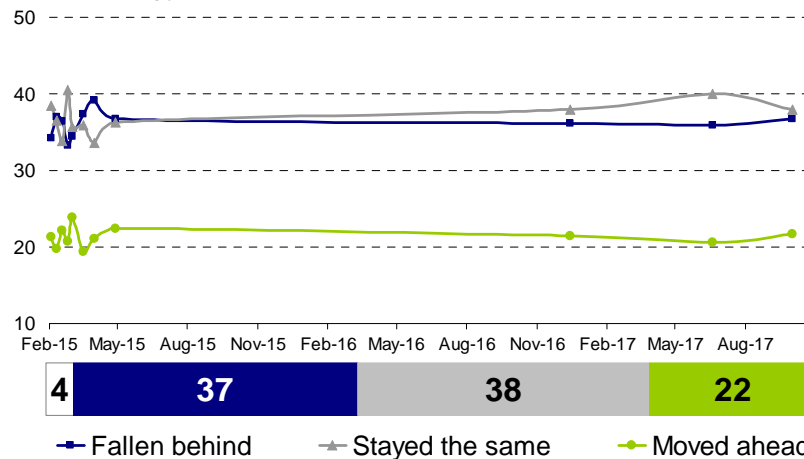


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BASE: Canadians (half-sample); Sep. 15-Oct. 1, 2017, n=2,489, MOE +/- 2.0%, 19 times out of 20

Self-rated progress (5 year)

Q. Thinking about your personal financial situation, would you say you have moved ahead, stayed the same, or fallen behind over the last FIVE YEARS?



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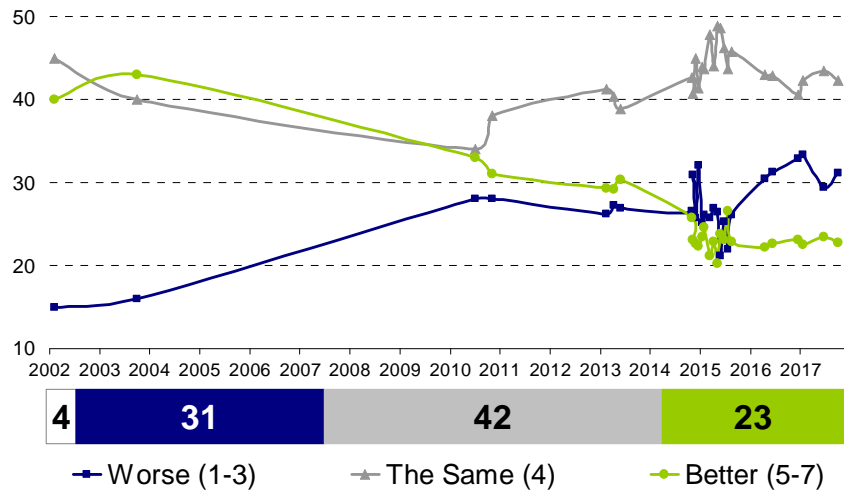
BASE: Canadians (half-sample); Sep. 15-Oct. 1, 2017, n=2,350, MOE +/- 2.0%, 19 times out of 20

Most Canadians think they have either stagnated or fallen back over the past year (only 14 per cent have advanced). Using a five-year rear-view mirror, things aren't much better with 75 per cent noting either stagnation or decline.

Looking into the future, the patterns are no more encouraging. Our future outlook data have a deeper time series which allows us to see how things compare to the beginning of the century, and it is a far different economic world than it was then.

Short-term financial outlook

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

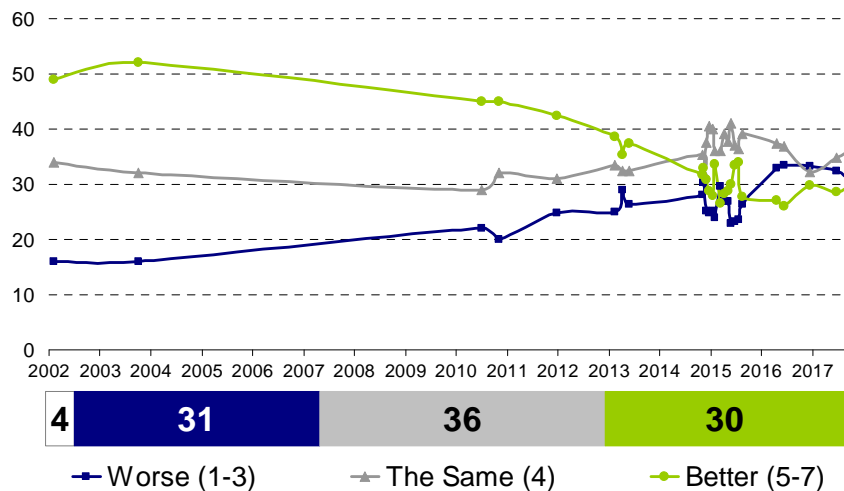


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BASE: Canadians (half-sample); Sep. 15-Oct. 1, 2017, n=2,489, MOE +/- 2.0%, 19 times out of 20

Medium-term 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 (half-sample); Sep. 15-Oct. 1, 2017, n=2,350, MOE +/- 2.0%, 19 times out of 20

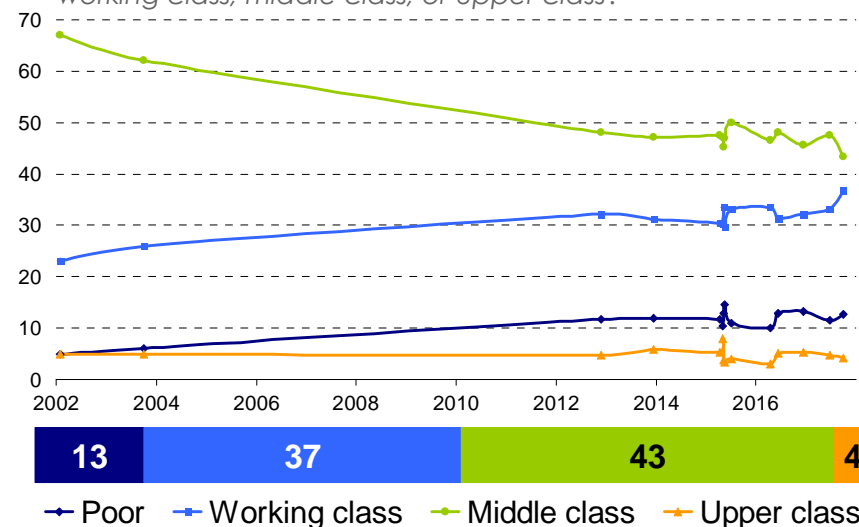
A minority of Canadians think the coming year or five years will see them in better shape. This is dramatically different than at the beginning of the century when optimism outweighed pessimism by a three-to-one margin. There has been a huge decline in optimism about the future over the past 15 years and it is a statistically clear pattern of decline.

The correlates of pessimism are consistent and clear. Those in the working class and poor are much more pessimistic and now are more evident in the Conservative constituency. This link between economic pessimism and partisanship is new. There is also a yawning gap across those with university educations and those without.

How about class identification? At the outset of the century, almost 70 per cent of Canadians located themselves in the middle class. That number has dropped steadily (in both Canada and the United States) and our most recent sounding of 43 per cent is the lowest ever recorded. Just as importantly, the incidence of those in the working class has nearly doubled and is now approaching a tie in terms of size with the middle class.

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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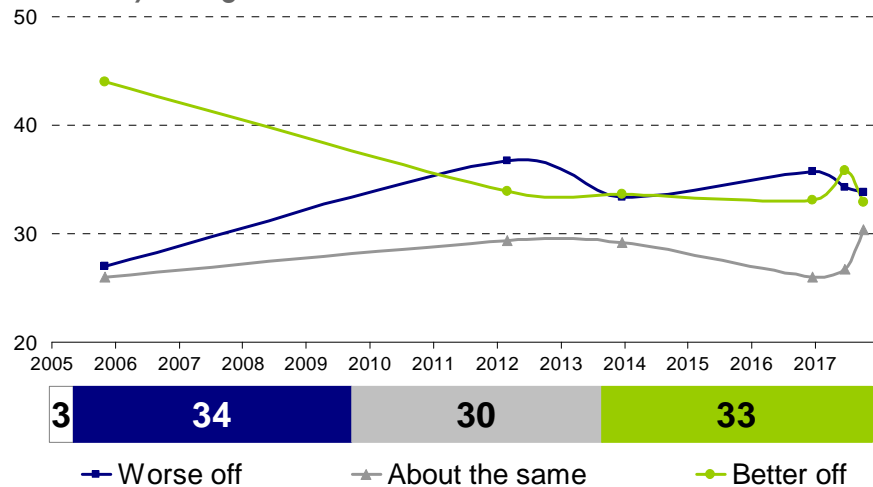
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BASE: Canadians; Sep. 15-Oct. 1, 2017, n=4,839, MOE +/- 1.4%, 19 times out of 20

If the middle class were the evergreen, most fertile political target of the past fifty years, this may be drawing to a close. The shrinking middle class are doing fine and are happy with the direction of the current government. The challenge is increasingly a swollen working class populated with those fallen out of the middle class. These voters are angry and upset with the current directions of the country and the government. They are the prime (but not exclusive) demographic fuel driving populism, nativism, and a search for a more ordered, less open society. These forces were critical in the most recent United States presidential election and Brexit.

Changes in quality of life over last 25 years

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**?

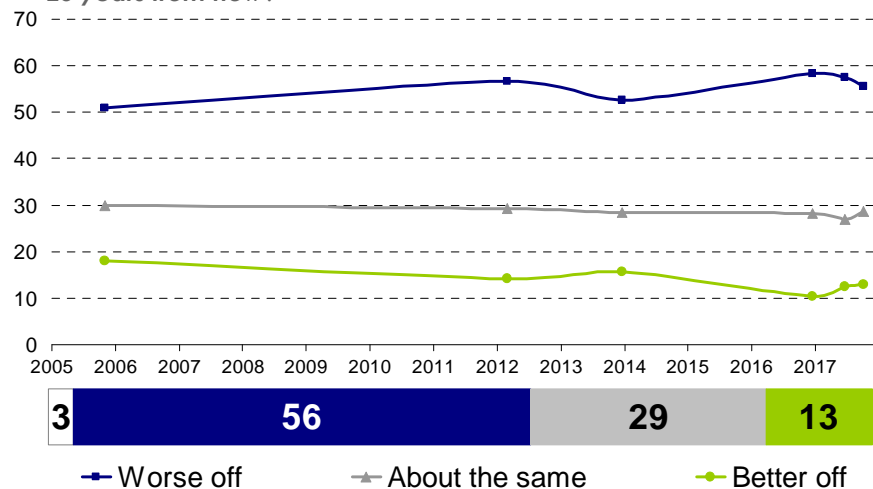


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BASE: Canadians (half-sample); Sep. 15-Oct. 1, 2017, n=2,396, MOE +/- 2.0%, 19 times out of 20

Changes in quality of life over next 25 years

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**?



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BASE: Canadians (half-sample); Sep. 15-Oct. 1, 2017, n=2,443, MOE +/- 2.0%, 19 times out of 20

The essence of the middle class bargain was that hard work, innovation, and skill would yield a better future than one's parents and that your kids, in turn, would do better. Get a secure job with benefits, buy a home, retire in security were the touchstones of the middle class bargain.

There may be some glimmers of rising optimism in our most recent tracking. For example, the incidence of those who think their children will do better has risen from 10 per cent to 13 per cent. Five-year outlook is up four points over last year. We know that perceptions of the economy tend to lag shifts in the 'official' economy so this will bear close watching. But the more striking conclusion is that the overwhelming majority of Canadians do not see a better future. The economics of despair and stagnation are producing a very different outlook and set of political choices. In the next section, we will try and document some of the cascading effects on cultural outlook, racial intolerance, and the search for an open society.

⁴ EKOS Research Associates, "Housing Affordability Crisis?", June 27, 2017. Available online at: goo.gl/yA9tzf

Detailed Tables:

Self-Rated Progress (1-Year)						
<i>Q. [Half-sample only] Thinking about your personal financial situation, would you say you have moved ahead, stayed the same, or fallen behind over the last year?</i>						
	Fallen behind	Stayed the same	Moved ahead	Skip	Sample Size	Margin of Error (+/-)
NATIONALLY	36.6%	45.5%	14.2%	3.7%	2489	2.0
REGION						
British Columbia	35.7%	46.4%	13.6%	4.2%	336	5.4
Alberta	48.1%	34.4%	12.7%	4.7%	401	4.9
Saskatchewan	53.7%	36.7%	6.9%	2.7%	108	9.4
Manitoba	26.0%	46.5%	23.6%	3.9%	105	9.6
Ontario	38.3%	43.2%	15.2%	3.2%	965	3.2
Quebec	27.8%	56.8%	11.8%	3.7%	394	4.9
Atlantic Canada	35.3%	42.8%	18.2%	3.7%	180	7.3
GENDER						
Male	37.4%	44.3%	16.0%	2.2%	1234	2.8
Female	37.6%	48.3%	13.2%	0.9%	1185	2.9
AGE						
<35	35.2%	41.7%	20.3%	2.8%	330	5.4
35-49	39.9%	43.0%	15.8%	1.3%	493	4.4
50-64	39.6%	47.2%	11.9%	1.3%	788	3.5
65+	34.8%	55.4%	8.8%	1.0%	810	3.4
EDUCATION						
High school or less	41.4%	43.3%	13.5%	1.8%	543	4.2
College or CEGEP	40.9%	45.5%	12.3%	1.4%	837	3.4
University or higher	31.7%	49.5%	17.4%	1.3%	1033	3.1
COUNTRY OF BIRTH						
Not born in Canada	34.9%	48.7%	15.4%	1.0%	420	4.8
Parent(s) not born in Canada	39.6%	44.6%	13.7%	2.1%	680	3.8
Both parents born in Canada	37.3%	46.8%	14.6%	1.4%	1323	2.7
CURRENT VOTE INTENTION						
Liberal Party	25.1%	55.2%	18.9%	0.8%	774	3.5
Conservative Party	50.4%	38.6%	10.2%	0.8%	787	3.5
NDP	38.9%	42.0%	18.5%	0.6%	303	5.6
Green Party	32.1%	50.3%	17.2%	0.4%	162	7.7
Bloc Québécois	37.6%	49.8%	11.6%	1.0%	75	11.3

Self-Rated Progress (5-Year)

Q. [Half-sample only] Thinking about your personal financial situation, would you say you have moved ahead, stayed the same, or fallen behind over the last five years?

	Fallen behind	Stayed the same	Moved ahead	Skip	Sample Size	Margin of Error (+/-)
NATIONALLY	36.8%	37.9%	21.7%	3.6%	2350	2.0
REGION						
British Columbia	39.7%	33.1%	23.2%	4.0%	335	5.4
Alberta	46.6%	32.5%	16.6%	4.4%	390	5.0
Saskatchewan	36.1%	33.3%	19.9%	10.8%	94	10.1
Manitoba	24.7%	42.9%	28.0%	4.4%	92	10.2
Ontario	39.2%	35.7%	22.3%	2.9%	862	3.3
Quebec	27.9%	46.0%	23.2%	3.0%	393	4.9
Atlantic Canada	39.4%	40.1%	16.8%	3.7%	184	7.2
GENDER						
Male	37.7%	35.8%	25.0%	1.4%	1175	2.9
Female	37.3%	42.0%	19.4%	1.3%	1106	3.0
AGE						
<35	33.2%	34.7%	29.0%	3.2%	281	5.9
35-49	38.8%	31.7%	28.3%	1.3%	511	4.3
50-64	42.3%	39.5%	17.3%	0.9%	761	3.6
65+	35.3%	51.5%	12.6%	0.6%	737	3.6
EDUCATION						
High school or less	41.1%	38.6%	19.3%	1.0%	563	4.1
College or CEGEP	44.0%	37.1%	17.6%	1.3%	738	3.6
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COUNTRY OF BIRTH						
Not born in Canada	40.7%	37.4%	20.0%	1.9%	406	4.9
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Green Party	42.0%	36.0%	21.3%	0.6%	162	7.7
Bloc Québécois	35.3%	40.9%	21.0%	2.8%	60	12.7

Short-Term Financial Outlook

Q. [Half-sample only] Thinking ahead over the next year or so, do you think your personal financial situation will be better or worse than it is today? Please use a 7-point scale where 1 means much worse, 7 means much better, and the midpoint, 4, means about the same.

	Worse (1-3)	About the same (4)	Better (5-7)	Skip	Sample Size	Margin of Error (+/-)
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Bloc Québécois	30.8%	62.7%	6.4%	0.0%	75	11.3

Medium-Term Financial Outlook

Q. [Half-sample only] 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? Please use a 7-point scale where 1 means much worse, 7 means much better, and the midpoint, 4, means about the same.

	Worse (1-3)	About the same (4)	Better (5-7)	Skip	Sample Size	Margin of Error (+/-)
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College or CEGEP	36.1%	37.3%	25.3%	1.3%	738	3.6
University or higher	23.7%	34.9%	40.2%	1.2%	980	3.1
COUNTRY OF BIRTH						
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Green Party	29.0%	38.2%	31.0%	1.8%	162	7.7
Bloc Québécois	37.2%	41.2%	21.6%	0.0%	60	12.7

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	Skip	Sample Size	Margin of Error (+/-)
NATIONALLY	12.6%	36.7%	43.3%	4.1%	3.3%	4839	1.4
REGION							
British Columbia	12.3%	37.9%	44.2%	2.9%	2.8%	671	3.8
Alberta	8.3%	45.7%	37.1%	4.0%	4.9%	791	3.5
Saskatchewan	11.8%	39.0%	38.5%	3.1%	7.5%	202	6.9
Manitoba	8.7%	45.7%	41.0%	1.9%	2.8%	197	7.0
Ontario	11.4%	36.7%	44.3%	4.4%	3.2%	1827	2.3
Quebec	16.4%	28.6%	46.7%	5.4%	2.9%	787	3.5
Atlantic Canada	16.7%	41.4%	38.1%	1.4%	2.4%	364	5.1
GENDER							
Male	12.1%	37.1%	44.7%	4.9%	1.2%	2409	2.0
Female	13.7%	38.0%	44.1%	3.5%	0.7%	2291	2.1
AGE							
<35	14.4%	39.4%	39.4%	5.2%	1.6%	611	4.0
35-49	11.3%	38.9%	44.5%	4.1%	1.2%	1004	3.1
50-64	12.6%	37.7%	45.1%	3.8%	0.7%	1549	2.5
65+	13.2%	33.4%	49.2%	3.3%	0.9%	1547	2.5
EDUCATION							
High school or less	24.0%	45.3%	28.1%	2.1%	0.6%	1106	3.0
College or CEGEP	11.6%	46.7%	39.8%	1.3%	0.5%	1575	2.5
University or higher	5.4%	23.7%	60.8%	8.4%	1.8%	2013	2.2
COUNTRY OF BIRTH							
Not born in Canada	13.4%	38.4%	42.5%	4.8%	1.0%	826	3.4
Parent(s) not born in Canada	12.7%	36.9%	45.0%	4.1%	1.3%	1306	2.7
Both parents born in Canada	12.8%	37.7%	44.6%	4.0%	0.9%	2582	1.9
CURRENT VOTE INTENTION							
Liberal Party	9.1%	31.6%	53.8%	4.9%	0.6%	1495	2.5
Conservative Party	10.0%	39.9%	44.6%	4.5%	1.0%	1558	2.5
NDP	14.4%	42.8%	38.0%	4.2%	0.6%	551	4.2
Green Party	13.8%	42.1%	38.6%	4.1%	1.3%	324	5.4
Bloc Québécois	23.9%	24.1%	45.4%	5.2%	1.4%	135	8.4

Changes in Quality of Life Over Last 25 Years

Q. [Half-sample only] 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	Skip	Sample Size	Margin of Error (+/-)
NATIONALLY	32.9%	30.4%	33.8%	2.9%	2396	2.0
REGION						
British Columbia	35.7%	20.7%	40.7%	2.9%	304	5.6
Alberta	26.8%	33.9%	35.2%	4.1%	400	4.9
Saskatchewan	30.2%	32.3%	29.0%	8.5%	107	9.5
Manitoba	45.8%	23.3%	29.8%	1.2%	94	10.1
Ontario	31.5%	29.0%	36.3%	3.1%	936	3.2
Quebec	33.2%	36.6%	28.4%	1.8%	368	5.1
Atlantic Canada	40.2%	32.3%	26.4%	1.1%	187	7.2
GENDER						
Male	34.6%	30.3%	33.8%	1.2%	1195	2.8
Female	32.6%	31.6%	35.3%	0.4%	1137	2.9
AGE						
<35	27.0%	30.1%	41.3%	1.6%	323	5.5
35-49	29.8%	29.5%	40.5%	0.2%	464	4.6
50-64	33.8%	32.1%	33.4%	0.7%	780	3.5
65+	46.2%	32.2%	20.8%	0.8%	769	3.5
EDUCATION						
High school or less	29.9%	34.2%	35.1%	0.8%	553	4.2
College or CEGEP	29.6%	30.1%	39.8%	0.5%	801	3.5
University or higher	40.5%	29.0%	30.0%	0.5%	965	3.2
COUNTRY OF BIRTH						
Not born in Canada	35.5%	32.6%	31.2%	0.7%	429	4.7
Parent(s) not born in Canada	33.3%	28.0%	37.2%	1.5%	622	3.9
Both parents born in Canada	33.1%	31.8%	34.6%	0.5%	1285	2.7
CURRENT VOTE INTENTION						
Liberal Party	47.4%	28.7%	23.7%	0.2%	758	3.6
Conservative Party	29.7%	32.2%	37.9%	0.3%	768	3.5
NDP	26.1%	31.0%	42.9%	0.0%	278	5.9
Green Party	29.0%	32.7%	36.0%	2.3%	153	7.9
Bloc Québécois	19.7%	33.8%	46.4%	0.0%	64	12.3

Changes in Quality of Life Over Next 25 Years

Q. [Half-sample only] 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	Skip	Sample Size	Margin of Error (+/-)
NATIONALLY	12.9%	28.6%	55.6%	3.0%	2443	2.0
REGION						
British Columbia	13.9%	24.6%	58.7%	2.8%	367	5.1
Alberta	13.7%	28.7%	53.6%	4.0%	391	5.0
Saskatchewan	7.3%	34.9%	52.1%	5.7%	95	10.1
Manitoba	12.3%	26.2%	59.1%	2.4%	103	9.7
Ontario	12.3%	24.5%	60.3%	2.9%	891	3.3
Quebec	14.1%	36.0%	47.6%	2.4%	419	4.8
Atlantic Canada	11.0%	31.8%	54.0%	3.2%	177	7.4
GENDER						
Male	16.1%	26.6%	56.3%	1.0%	1214	2.8
Female	10.5%	31.7%	57.3%	0.5%	1154	2.9
AGE						
<35	18.7%	23.3%	56.6%	1.5%	288	5.8
35-49	13.3%	30.0%	55.4%	1.3%	540	4.2
50-64	10.3%	30.1%	59.2%	0.4%	769	3.5
65+	10.0%	34.0%	55.2%	0.7%	778	3.5
EDUCATION						
High school or less	15.4%	29.3%	54.3%	1.0%	553	4.2
College or CEGEP	9.1%	25.5%	64.7%	0.6%	774	3.5
University or higher	14.7%	32.1%	52.1%	1.1%	1048	3.0
COUNTRY OF BIRTH						
Not born in Canada	23.7%	24.7%	50.6%	1.0%	397	4.9
Parent(s) not born in Canada	13.3%	30.4%	54.8%	1.5%	684	3.8
Both parents born in Canada	9.7%	29.9%	59.8%	0.6%	1297	2.7
CURRENT VOTE INTENTION						
Liberal Party	19.3%	38.2%	42.4%	0.1%	737	3.6
Conservative Party	7.4%	23.4%	68.3%	0.9%	790	3.5
NDP	18.8%	28.0%	52.4%	0.9%	273	5.9
Green Party	10.0%	25.1%	64.6%	0.3%	171	7.5
Bloc Québécois	11.7%	35.6%	52.7%	0.0%	71	11.6

Methodology:

This survey was conducted using High Definition Interactive Voice Response (HD-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.

The field dates for this survey are September 15 – October 1, 2017. In total, a random sample of 4,839 Canadian adults aged 18 and over responded to the survey. The margin of error associated with the total sample is +/- 1.4 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 by **age, gender, region, and educational attainment** to ensure the sample's composition reflects that of the actual population of Canada according to Census data.