

***Best plan for Canadian economy trumps
fighting terrorists by more than 20 to 1 as an
important election issue, say Canadians***

National survey released March, 2015

Project 2015-659

THE GLOBE AND MAIL 

 **NANOS SURVEY**



Canadians say health care spending more important than infrastructure but see infrastructure as having the largest positive impact

“Even with the Globe/Nanos Survey being conducted at the height of the focus on national debate related to Bill C-51 and the war on terror, Canadians are overwhelmingly looking to judge a party in the next election on its plan for the Canadian economy. Although more infrastructure is seen as having the most positive impact on the economy – Canadians are much more likely to want to see the federal government spend more money on health care.”

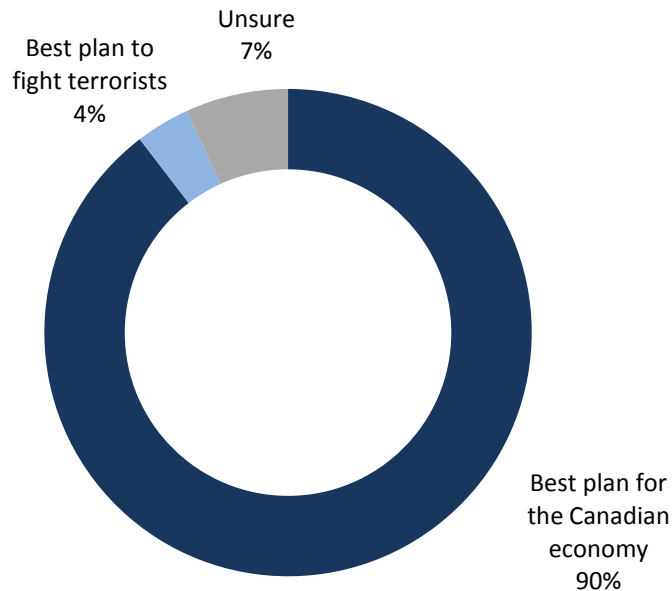
Nik Nanos, Chairman
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The economy is clearly more important to Canadians than the government’s plan to fight terrorists when it comes to the next election but Canadians are generally feeling less safe than they were five years ago.

- **Election issue importance** – Canadians clearly believe that the best plan for the Canadian economy (90%) will be more important than the best plan to fight terrorists (4%) for who wins the next election.
- **Perceptions of safety** – When it comes to possible terrorist threats, Canadians are more likely to feel less safe than five years ago (17% less safe and 37% somewhat less safe).
- **Spending priorities for surplus** – If the Government of Canada has a surplus, the number one priority is to invest in infrastructure (32%) followed by paying down the debt (30%). Investing in social programs (23%) receives the next most support followed by reducing taxes (14%).
- **Positive impacts on the economy** – 46% of Canadians think building infrastructure would have the largest positive impact on the Canadian economy. Much fewer mention paying down the debt (18%), cutting taxes (17%) and investing in social programs (17%).
- **Preferences for government spending** – If given the choice, Canadians would rather spend more money on health care (54%) than infrastructure (38%).

Important Issues in Upcoming Federal Election Term

Source: Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, March 21st and 24th, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



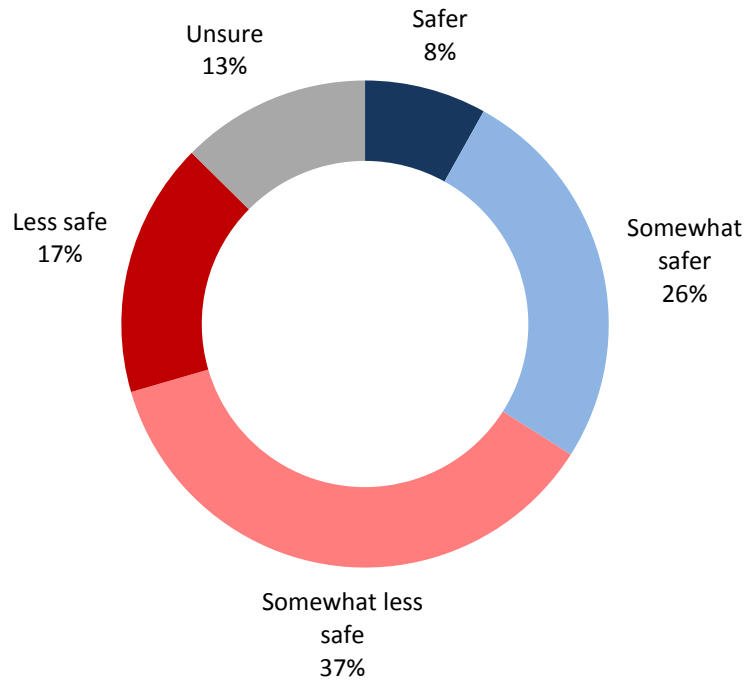
*Note: Charts may not add up to 100 due to rounding

Subgroups	Best Plan for Canadian Economy (n=1000)
Atlantic (n=100)	95.1%
Quebec (n=250)	85.5%
Ontario (n=300)	90.9%
Prairies (n=200)	87.4%
British Columbia (n=150)	92.7%
Male (n=496)	90.8%
Female (n=504)	88.3%
18 to 29 (n=206)	92.1%
30 to 39 (n=169)	90.2%
40 to 49 (n=208)	88.7%
50 to 59 (n=178)	90.3%
60 plus (n=293)	87.0%

QUESTION – Thinking about the upcoming federal election, what do you think will be more important in determining who wins the election [ROTATE] the party and leader with the best plan for the Canadian economy OR the party and leader with the best plan to fight terrorists.

Perceptions of Canada's Safety

Source: Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, March 21st and 24th, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



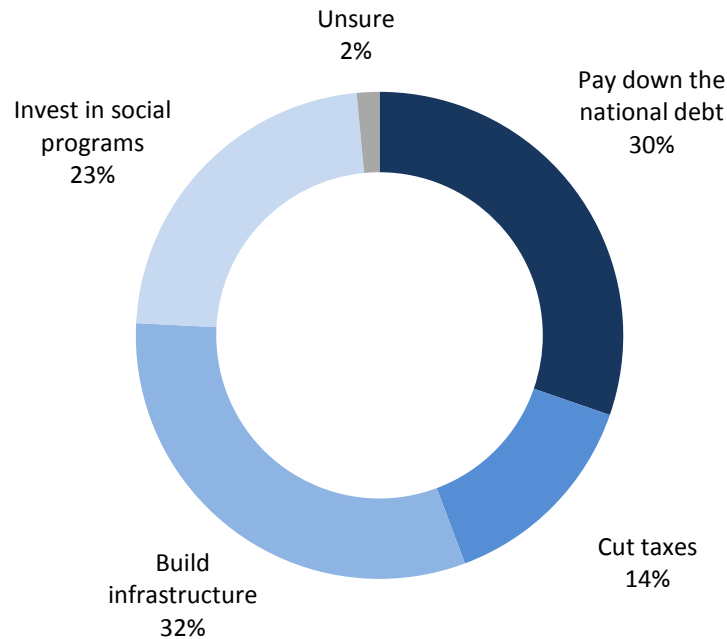
Subgroups	Less Safe/ Somewhat less safe (n=1000)
Atlantic (n=100)	50.2%
Quebec (n=250)	56.2%
Ontario (n=300)	53.0%
Prairies (n=200)	52.5%
British Columbia (n=150)	52.8%
Male (n=496)	51.9%
Female (n=504)	54.9%
18 to 29 (n=206)	44.9%
30 to 39 (n=169)	49.8%
40 to 49 (n=208)	54.3%
50 to 59 (n=178)	57.7%
60 plus (n=293)	59.2%

*Note: Charts may not add up to 100 due to rounding

QUESTION – Thinking of possible terrorist threats in Canada, is Canada safer, somewhat safer, somewhat less safe or less safe compared to five years ago?

Spending Priorities for Government Surplus

Source: Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, March 21st and 24th, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



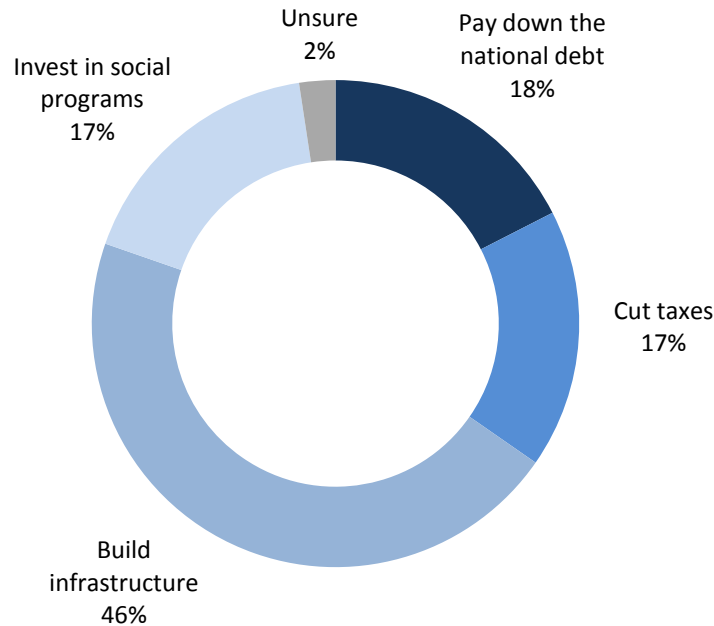
Subgroups	Build Infrastructure (n=1000)
Atlantic (n=100)	34.1%
Quebec (n=250)	26.5%
Ontario (n=300)	34.4%
Prairies (n=200)	31.1%
British Columbia (n=150)	32.8%
Male (n=496)	33.5%
Female (n=504)	29.5%
18 to 29 (n=206)	23.4%
30 to 39 (n=169)	29.6%
40 to 49 (n=208)	31.6%
50 to 59 (n=178)	36.1%
60 plus (n=293)	36.4%

*Note: Charts may not add up to 100 due to rounding

QUESTION – If the Government of Canada has a surplus in the next federal budget what would you like to see done with the surplus [RANDOMIZE] Pay down the national debt, cut taxes, build infrastructure, or invest in social programs?

Positive Impacts on the Canadian Economy

Source: Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, March 21st and 24th, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



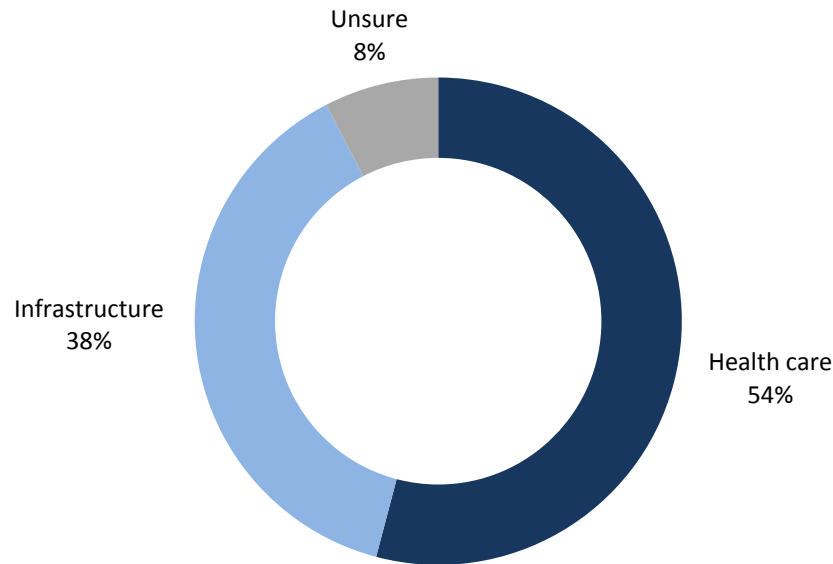
*Note: Charts may not add up to 100 due to rounding

Subgroups	Build Infrastructure (n=1000)
Atlantic (n=100)	48.7%
Quebec (n=250)	39.4%
Ontario (n=300)	49.5%
Prairies (n=200)	49.8%
British Columbia (n=150)	40.7%
Male (n=496)	49.6%
Female (n=504)	41.7%
18 to 29 (n=206)	37.3%
30 to 39 (n=169)	41.1%
40 to 49 (n=208)	44.8%
50 to 59 (n=178)	47.3%
60 plus (n=293)	55.6%

QUESTION – Which of the following potential activities do you believe would create the largest positive impact on the Canadian economy? Pay down the national debt, cut taxes, build infrastructure, invest in social programs.

Preferences for Government Spending

Source: Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, March 21st and 24th, 2015, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



*Note: Charts may not add up to 100 due to rounding

Subgroups	Health care (n=1000)	Infrastructure (n=1000)
Atlantic (n=100)	53.5%	39.5%
Quebec (n=250)	59.0%	33.2%
Ontario (n=300)	52.2%	39.6%
Prairies (n=200)	48.4%	44.0%
British Columbia (n=150)	57.8%	35.9%
Male (n=496)	46.6%	45.7%
Female (n=504)	61.5%	31.0%
18 to 29 (n=206)	56.3%	37.9%
30 to 39 (n=169)	60.3%	30.2%
40 to 49 (n=208)	48.2%	45.5%
50 to 59 (n=178)	53.3%	38.5%
60 plus (n=293)	53.6%	38.0%

QUESTION – Given the choice, would you rather the government spend more money on health care or on infrastructure?



Methodology



Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between March 21st and 24th, 2015 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

The data presented in this research is part of a joint project by The Globe and Mail and Nanos Research.

Note: Charts may not add up to 100 due to rounding.

About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



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Tabulations

THE GLOBE AND MAIL



 NANOS SURVEY



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		Question 1 – Thinking about the upcoming federal election, what do you think will be more important in determining who wins the election. [ROTATE]			
		Total	The party and leader with the best plan for the Canadian economy	The party and leader with the best plan to fight terrorists	Unsure
		Responses	Percentage	Percentage	Percentage
Region	Canada 2015-03	1000	89.5	3.6	6.8
	Atlantic Canada	100	95.1	1.7	3.2
	Quebec	250	85.5	5.5	9.0
	Ontario	300	90.9	3.9	5.2
	Prairies	200	87.4	3.7	8.9
	British Columbia	150	92.7	1.4	5.9
Gender	Male	496	90.8	3.8	5.5
	Female	504	88.3	3.5	8.2
Age	18 to 29	206	92.1	1.6	6.3
	30 to 39	169	90.2	1.9	7.8
	40 to 49	208	88.7	5.4	5.9
	50 to 59	178	90.3	4.9	4.8
	60 plus	239	87.0	4.2	8.8

Nanos conducted a RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between March 21st to 24th, as part of an omnibus survey. The sample included both land- and cell-lines across Canada. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.



2015-659 – GLOBE & MAIL/Nanos Survey – STAT SHEET

		Question 2 – Thinking of possible terrorist threats in Canada, is Canada safer, somewhat safer, somewhat less safe or less safe compared to five years ago?					
		Total	Safer	Somewhat safer	Somewhat less safe	Less safe	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2015-03	1000	8.1	25.9	36.5	16.9	12.6
	Atlantic Canada	100	9.1	30.1	34.9	15.3	10.7
	Quebec	250	7.2	24.8	38.9	17.3	11.8
	Ontario	300	8.4	24.8	37.1	15.9	13.8
	Prairies	200	7.3	27.3	32.5	20.0	12.9
	British Columbia	150	9.1	25.3	37.7	15.1	12.8
Gender	Male	496	7.5	27.1	33.1	18.8	13.5
	Female	504	8.6	24.7	39.8	15.1	11.8
Age	18 to 29	206	4.6	29.1	32.6	12.3	21.4
	30 to 39	169	8.6	27.4	34.1	15.7	14.2
	40 to 49	208	8.8	25.6	34.7	19.6	11.2
	50 to 59	178	8.7	22.5	38.7	19.0	11.1
	60 plus	239	9.5	24.9	41.5	17.7	6.4

Nanos conducted a RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between March 21st to 24th, as part of an omnibus survey. The sample included both land- and cell-lines across Canada. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.



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		Question 3 – If the Government of Canada has a surplus in the next federal budget what would you like to see done with the surplus [RANDOMIZE]					
		Total	Pay down the national debt	Cut taxes	Build infrastructure	Invest in social programs	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2015-03	1000	30.3	14.0	31.5	22.7	1.5
	Atlantic Canada	100	32.2	8.6	34.1	23.2	1.9
	Quebec	250	30.4	18.6	26.5	24.5	.0
	Ontario	300	28.9	16.7	34.4	18.2	1.8
	Prairies	200	35.9	10.6	31.1	20.6	1.8
	British Columbia	150	24.2	9.4	32.8	31.0	2.5
Gender	Male	496	34.4	10.1	33.5	21.1	.9
	Female	504	26.2	17.9	29.5	24.3	2.1
Age	18 to 29	206	28.8	19.6	23.4	26.7	1.5
	30 to 39	169	24.5	17.2	29.6	25.9	2.8
	40 to 49	208	35.7	16.8	31.6	14.2	1.7
	50 to 59	178	30.2	7.4	36.1	25.4	1.0
	60 plus	239	31.1	9.6	36.4	22.4	.6

Nanos conducted a RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between March 21st to 24th, as part of an omnibus survey. The sample included both land- and cell-lines across Canada. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.



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		Question 4 – Which of the following potential activities do you believe would create the largest positive impact on the Canadian economy?					
		Total	Pay down the national debt	Cut taxes	Build infrastructure	Invest in social programs	Unsure
		Responses	Percentage	Percentage	Percentage	Percentage	Percentage
Region	Canada 2015-03	1000	17.5	17.2	45.7	17.3	2.4
	Atlantic Canada	100	18.7	12.1	48.7	16.7	3.8
	Quebec	250	20.8	19.5	39.4	18.4	2.0
	Ontario	300	13.2	19.8	49.5	14.9	2.6
	Prairies	200	22.6	14.4	49.8	11.9	1.2
	British Columbia	150	12.8	15.1	40.7	27.6	3.7
Gender	Male	496	18.4	17.0	49.6	13.7	1.2
	Female	504	16.5	17.3	41.7	20.7	3.7
Age	18 to 29	206	20.2	18.6	37.3	20.6	3.3
	30 to 39	169	16.8	20.5	41.1	19.1	2.6
	40 to 49	208	16.0	19.4	44.8	16.2	3.6
	50 to 59	178	19.2	14.6	47.3	18.6	.3
	60 plus	239	15.7	13.6	55.6	12.9	2.2

Nanos conducted a RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between March 21st to 24th, as part of an omnibus survey. The sample included both land- and cell-lines across Canada. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.



2015-659 - GLOBE & MAIL/Nanos Survey - STAT SHEET

		Question 5 - Given the choice, would you rather the government spend more money on healthcare or on infrastructure?			
		Total	Healthcare	Infrastructure	Unsure
		Responses	Percentage	Percentage	Percentage
Region	Canada 2015-03	1000	54.1	38.3	7.6
	Atlantic Canada	100	53.5	39.5	7.0
	Quebec	250	59.0	33.2	7.8
	Ontario	300	52.2	39.6	8.1
	Prairies	200	48.4	44.0	7.6
	British Columbia	150	57.8	35.9	6.4
Gender	Male	496	46.6	45.7	7.7
	Female	504	61.5	31.0	7.5
Age	18 to 29	206	56.3	37.9	5.8
	30 to 39	169	60.3	30.2	9.5
	40 to 49	208	48.2	45.5	6.3
	50 to 59	178	53.3	38.5	8.2
	60 plus	239	53.6	38.0	8.4

Nanos conducted a RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between March 21st to 24th, as part of an omnibus survey. The sample included both land- and cell-lines across Canada. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.