

Priorities



February 22nd, 2012

Jobs top priority, pensions and taxes trending up

METHODOLOGY

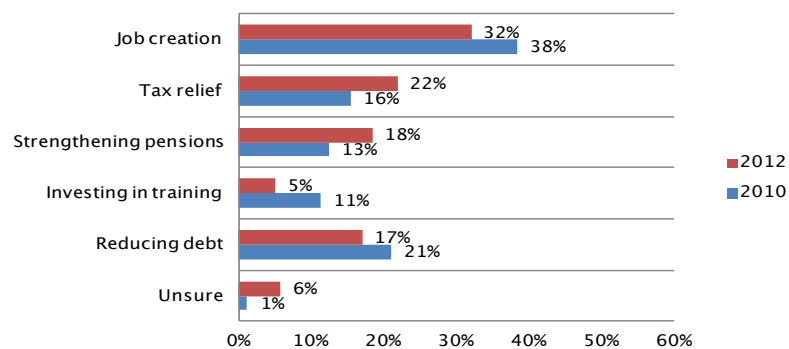
To follow is a review of the latest Nanos national random online survey. The current wave is based on a representative random sample of 1,001 Canadians, conducted online by Nanos Research between February 7th and 11th, 2012.

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QUESTION: Please rank your first and second priority from the following list: [ROTATE] job creation, tax relief, strengthening pensions, investing in training, reducing debt.

Ranked First



PRIORITIES

Responses (%)**	Job Creation		Tax Relief		Strengthening Pensions		Investing in Training		Reducing Debt		Unsure	
	1 st Rank	2 nd Rank	1 st Rank	2 nd Rank	1 st Rank	2 nd Rank	1 st Rank	2 nd Rank	1 st Rank	2 nd Rank	1 st Rank	2 nd Rank
	%	%	%	%	%	%	%	%	%	%	%	%
Canada (n=1,001)	32.0	23.6	21.9	24.9	18.4	18.7	5.0	10.6	17.0	20.0	5.7	2.3
Atlantic (n=103)	32.1	27.3	22.6	18.4	14.1	25.5	3.4	8.7	19.0	17.0	8.8	3.0
Quebec (n=252)	34.2	18.6	23.7	27.8	16.2	20.7	5.1	11.3	17.5	20.3	3.4	1.4
Ontario (n=294)	36.8	27.2	22.8	25.2	15.3	17.5	4.8	10.0	14.9	17.2	5.5	2.9
Prairies (n=200)	21.4	21.9	18.0	26.0	30.8	14.1	4.7	13.0	19.3	21.5	5.9	3.5
British Columbia (n=152)	32.8	24.9	22.1	22.0	14.6	18.8	7.0	8.5	15.9	24.8	7.4	1.0
Male (n=496)	31.5	23.1	20.1	23.9	15.8	18.9	6.1	10.9	20.8	21.5	5.7	1.7
Female (n=505)	32.5	24.0	23.7	25.9	20.9	18.4	4.0	10.3	13.3	18.5	5.6	3.0
Age 18-29 (n=199)	41.1	17.8	18.7	25.5	6.6	12.6	9.4	8.5	15.9	31.5	8.3	4.1
Age 30-39 (n=204)	34.4	30.5	26.3	24.3	12.8	14.5	5.2	10.9	16.6	18.5	4.7	1.2
Age 40-49 (n=206)	35.1	25.7	22.5	25.7	15.0	18.7	3.7	12.3	15.8	16.2	7.9	1.5
Age 50-59 (n=205)	23.4	24.0	26.3	25.7	25.8	20.1	1.7	10.1	18.1	15.9	4.6	4.2
Age 60 plus (n=186)	25.6	19.4	15.2	23.0	32.6	27.6	5.3	11.2	18.8	18.1	2.5	0.8

*Note: Small sample size

**Note: Percentages may not add up to 100 due to rounding. Readers should note that the sample size for 2nd ranked responses will vary slightly from the total sample size.

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Confidence in CPP/QPP



February 22nd, 2012

Faltering confidence in future CPP payments

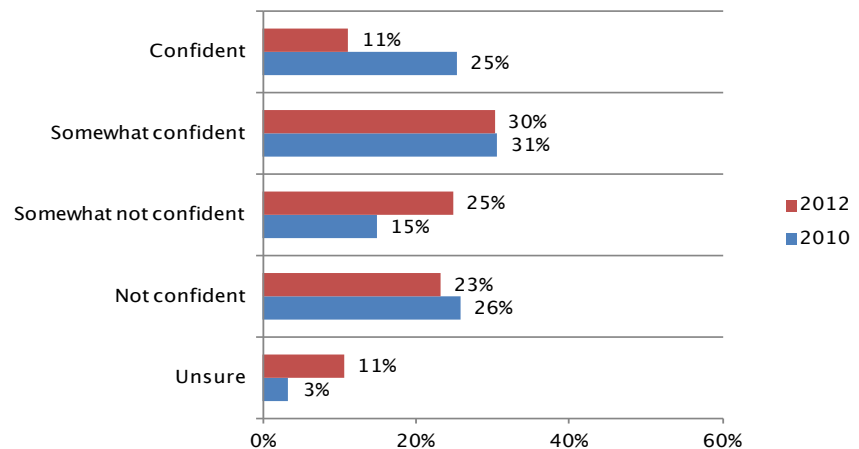
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QUESTION: Are you confident, somewhat confident, somewhat not confident or not confident in the following [ROTATE]: The Canadian Pension Plan [Quebec Pension Plan for QC sample] will be able to deliver on promised payments to pensioners in the future.



CONFIDENCE IN CPP/QPP

Responses (%)**	Confident	Somewhat confident	Somewhat not confident	Not confident	Unsure
	%	%	%	%	%
Canada (n=1,001)	11.2	30.2	24.8	23.2	10.6
Atlantic (n=103)	12.7	25.3	25.2	24.3	12.6
Quebec (n=252)	12.1	29.2	26.7	24.8	7.2
Ontario (n=294)	12.5	33.7	23.7	20.3	9.9
Prairies (n=200)	7.3	32.5	19.7	27.9	12.7
British Columbia (n=152)	11.3	25.8	30.1	19.6	13.3
Male (n=496)	14.3	32.6	22.8	22.2	8.2
Female (n=505)	8.2	27.9	26.7	24.2	12.9
Age 18-29 (n=199)	12.6	34.2	20.8	16.0	16.4
Age 30-39 (n=204)	10.4	26.6	27.9	24.4	10.6
Age 40-49 (n=206)	6.7	26.9	26.5	28.6	11.3
Age 50-59 (n=205)	9.1	25.1	27.1	31.9	6.7
Age 60 plus (n=186)	17.7	39.3	21.2	14.1	7.7

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Confidence in Company Pension Plans



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Confidence slips on future security of company pensions

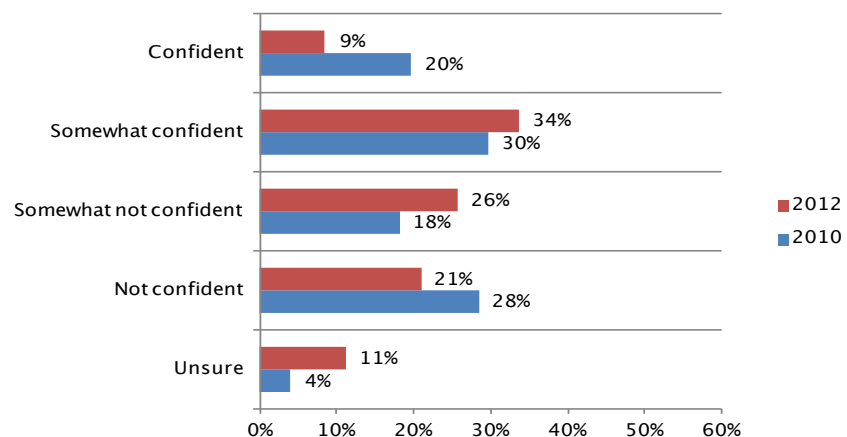
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QUESTION: Are you confident, somewhat confident, somewhat not confident or not confident in the following [ROTATE]: Company pension plans will be able to deliver on promised payments to pensioners in the future.



CONFIDENCE IN COMPANY PENSION PLANS

Responses (%)**	Confident	Somewhat confident	Somewhat not confident	Not confident	Unsure
	%	%	%	%	%
Canada (n=1,001)	8.5	33.7	25.7	20.9	11.2
Atlantic (n=103)	7.2	36.9	21.5	22.2	12.2
Quebec (n=252)	7.5	33.8	27.5	22.1	9.1
Ontario (n=294)	12.2	32.0	26.5	18.7	10.6
Prairies (n=200)	5.9	37.8	22.3	23.4	10.6
British Columbia (n=152)	7.6	29.2	28.6	19.0	15.6
Male (n=496)	10.4	37.3	22.9	20.8	8.5
Female (n=505)	6.7	30.1	28.4	21.0	13.8
Age 18-29 (n=199)	14.4	37.3	21.8	11.3	15.2
Age 30-39 (n=204)	10.0	36.4	21.8	21.2	10.6
Age 40-49 (n=206)	6.4	32.4	27.6	23.4	10.2
Age 50-59 (n=205)	6.4	29.8	29.3	25.5	9.1
Age 60 plus (n=186)	5.5	32.7	28.2	22.9	10.8

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CPP Payments



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Majority still believe reduced CPP payments likely in future

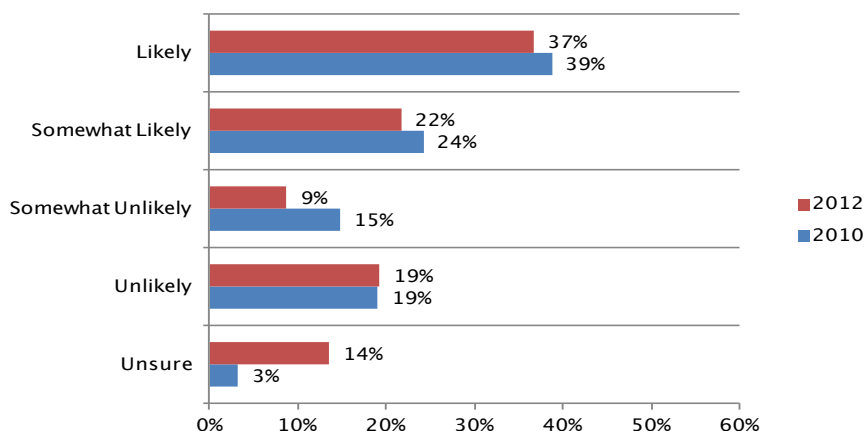
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QUESTION: Do you believe the following are likely, somewhat likely, somewhat unlikely, or unlikely to happen? [ROTATE] The Canada Pension Plan [Quebec Pension Plan for QC sample] will have to reduce promised payments to pensioners in the future.



LIKELIHOOD OF REDUCED CPP/QPP PAYMENTS

Responses (%)**	Likely	Somewhat Likely	Somewhat Unlikely	Unlikely	Unsure
	%	%	%	%	%
Canada (n=1,001)	36.7	21.7	8.7	19.3	13.6
Atlantic (n=103)	36.9	20.9	9.0	22.6	10.7
Quebec (n=252)	34.9	23.7	13.7	16.6	11.2
Ontario (n=294)	37.0	23.8	7.3	18.0	13.9
Prairies (n=200)	35.5	20.8	6.0	23.8	13.8
British Columbia (n=152)	40.8	15.9	6.3	18.1	18.9
Male (n=496)	37.3	18.3	10.5	23.4	10.5
Female (n=505)	36.2	25.0	6.9	15.2	16.7
Age 18-29 (n=199)	36.2	23.7	5.3	15.1	19.7
Age 30-39 (n=204)	38.6	26.5	4.5	17.9	12.5
Age 40-49 (n=206)	34.3	26.0	5.8	18.7	15.1
Age 50-59 (n=205)	41.4	22.9	9.4	15.9	10.3
Age 60 plus (n=186)	32.9	7.9	19.3	29.5	10.3

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Company Pension Payments



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Weakened majority see likelihood of reduced corporate pensions

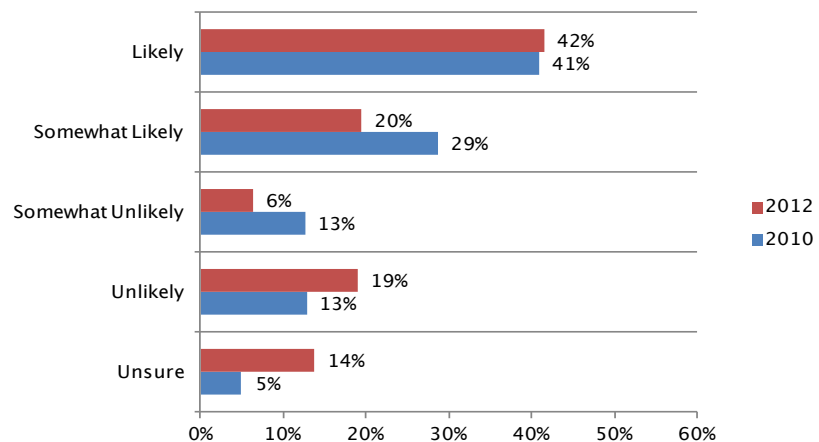
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QUESTION: Do you believe the following are likely, somewhat likely, somewhat unlikely, or unlikely to happen? [ROTATE] Company supported pension plans will have to reduce promised payments to pensioners in the future.



LIKELIHOOD OF REDUCED COMPANY PENSION PAYMENTS

Responses (%)**	Likely	Somewhat Likely	Somewhat Unlikely	Unlikely	Unsure
	%	%	%	%	%
Canada (n=1,001)	41.5	19.5	6.3	19.0	13.8
Atlantic (n=103)	37.3	24.7	6.0	19.6	12.4
Quebec (n=252)	37.7	20.2	8.4	21.0	12.7
Ontario (n=294)	43.6	21.9	4.2	17.2	13.1
Prairies (n=200)	43.9	16.3	6.1	20.2	13.5
British Columbia (n=152)	43.1	14.2	7.3	17.0	18.2
Male (n=496)	40.7	17.5	7.9	21.9	12.1
Female (n=505)	42.2	21.5	4.7	16.2	15.4
Age 18-29 (n=199)	39.0	19.3	5.7	16.4	19.5
Age 30-39 (n=204)	39.1	23.3	4.3	21.7	11.5
Age 40-49 (n=206)	35.4	19.8	7.6	22.1	15.1
Age 50-59 (n=205)	45.2	20.6	7.6	16.4	10.2
Age 60 plus (n=186)	49.2	13.9	6.2	18.1	12.6

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NANOS

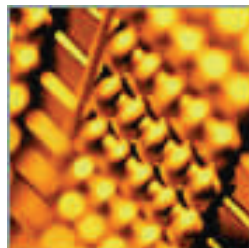
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- Online Surveys
- eConsultation Polling and Online Dialogue
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- Elite in-depth interviews
- Mystery Shopping
- Management Consulting



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