NORTH AMERICAN TRACKER

Leger

March 16th, 2022

EDITION

ACS • AEC

THE CANADIAN PRESS

METHODOLOGICAL APPROACH

METHODOLOGY

Leger, the largest Canadian-owned polling and marketing research firm, in collaboration with The Canadian Press, conducted this web survey with a representative sample of **1,515 Canadians and 1,002 Americans,** over the age of 18, selected from LEO's (Leger Opinion) representative panel. The questionnaire consisted of 25 questions and was completed in 10 minutes on average. Data collection took place from **March 11th, 2022, to March 13th, 2022**, via Computer-Assisted Web Interviewing technology (CAWI).

Using 2016 Census reference variables, the Canadian data was then analyzed and weighted by our statisticians according to gender, age, mother tongue, region, education level, and presence of children in households. Using 2010 U.S. Census reference variables, the American data was then analyzed and weighted by our statisticians according to gender, age, region, race/ethnicity, household size and education level in order to render a representative sample of the general population.

METHODOLOGICAL APPROACH

METHODOLOGY

The LEO (Leger Opinion) panel is the largest Canadian panel with over 400,000 representative panelists from all regions of Canada. LEO was created by Leger based on a representative Canadian sample of Canadian citizens with Internet access.

LEO's panelists were randomly selected (RDD) through Leger's call centre, panelists from more hard-to-reach target groups were also added to the panel through targeted recruitment campaigns. The double opt-in selection process, a model to detect fraud and the renewal of 25% of the panel each year ensures complete respondent quality. To ensure a higher response rate and reach people on their mobile devices, Leger has also developed a high-performance Apple and Android application.

In fact, Leger is the only Canadian research firm offering both the number and quality of panelists. Most competing polling firms in Canada and the United States also use the LEO panel.

METHODOLOGICAL APPROACH

METHODOLOGY

A margin of error cannot be associated with a non-probability sample in a panel survey. For comparison purposes, a probability sample of this size would have a margin of error **±2.5%, 19 times out of 20** for the Canadian sample and of **±3.096%, 19 times out of 20** for the American sample. The results presented in this study comply with the public opinion research standards and disclosure requirements of CRIC (the Canadian Research and Insights Council) and the global ESOMAR network. Leger is a founding member of CRIC and is actively involved in raising quality standards in the survey industry. President Jean-Marc Léger is a member of the CRIC's Board of Directors and the Canadian representative of ESOMAR.

METHODOLOGICAL APPROACH

METHODOLOGY

Leger is the polling firm that has presented the most accurate data, on average, over the last ten years in Canada. During the last federal election in 2021, Leger was once again **the most accurate firm in the country**. This accuracy is attributed to the quality of the LEO panel and rigorous application of methodological rules by Leger's 600 employees, including 200 professionals in Leger's eight offices across Canada (Montreal, Toronto, Quebec City, Winnipeg, Calgary, Edmonton and Vancouver) and in the United States (Philadelphia).

Poll aggregator 338Canada.com gave Leger the highest rating among all polling firms in Canada for the accuracy of its studies. See https://338canada.com/pollster-ratings.htm

2021 CANADIAN FEDERAL ELECTION

	CPC	LPC	NDP	BQ	PPC	GPC
LEGER SURVEY Published in *Le Journal de Montréal and The National Post/Postmedia* September 18, 2021	33%	32%	19%	7%	6%	2%
OFFICIAL RESULTS 2021 Canadian Federal Election*	33.7%	32.6%	17.8%	7.7%	5.0%	2.3%

**The official results were obtained from Elections Canada on September 24, 2021, at 9:45 a.m. EDT.*

NOTES ON READING THIS REPORT

METHODOLOGY

The numbers presented have been rounded. However, the numbers before rounding were used to calculate the sums presented and might therefore not correspond to the manual addition of these numbers.

In this report, data in bold **red** characters indicates a significantly lower proportion than that of other respondents. Conversely, data in bold **green** characters indicates a significantly higher proportion that that of other respondents.

A more detailed methodology is presented in the appendix.

If you have questions about the data presented in this report, please contact Christian Bourque, Associate and Executive Vice-President at the following e-mail address: cbourque@leger360.com or Jack Jedwab, President & CEO of the Association for Canadian Studies: jack.jedwab@acs-aec.ca.

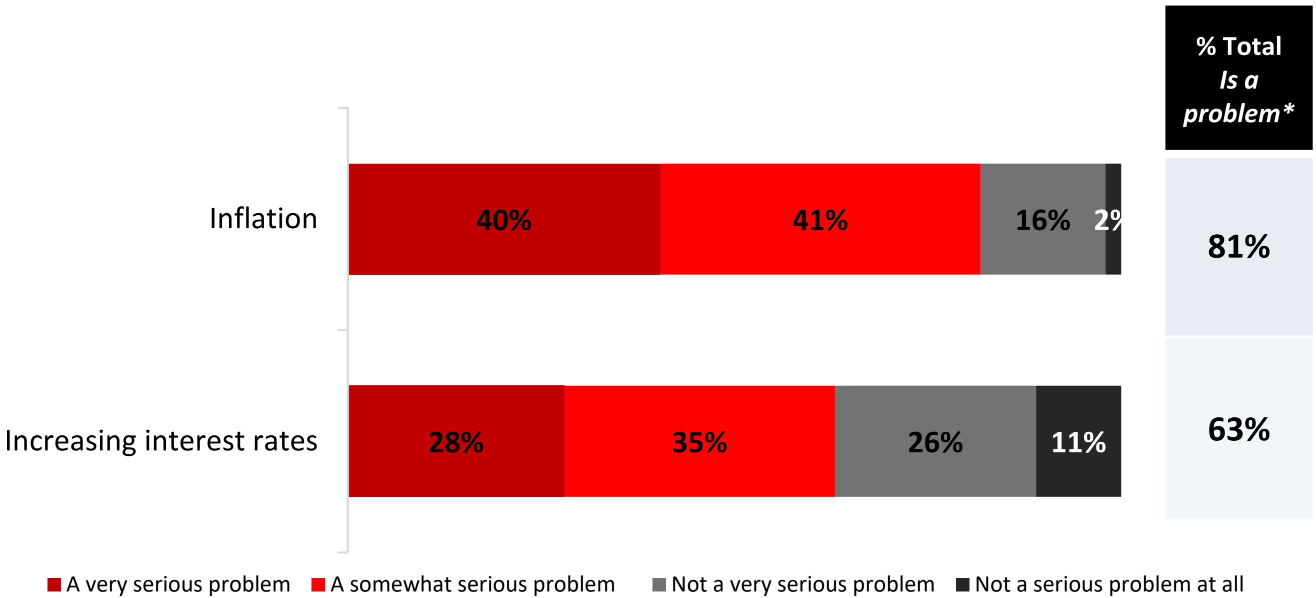
For any questions related to our services, or to request an interview, please contact us **by clicking here**.

INFLATION AND ECONOMIC CONCERNS

HOW INFLATION/INTEREST RATES ARE IMPACTING HOUSEHOLDS (1/2)

CTC928. How serious a problem is inflation/increasing interest rates for your household?

Base: All respondents (n=1,515)



**Total A very serious problem + A somewhat serious problem*

HOW INFLATION/INTEREST RATES ARE IMPACTING HOUSEHOLDS (2/2)

CTC928. How serious a problem is inflation/increasing interest rates for your household?

Base: All respondents

	TOTAL CANADA	Atl.	QC	ON	MB/SK	AB	BC	18-34	35-54	55+	Urban	Sub-urban	Rural
Weighted n=	1,515	104	355	581	99	170	206	405	524	585	652	552	295
Unweighted n=	1,515	100	414	601	125	125	150	451	554	510	662	548	289
Inflation													
A very serious problem	40%	48%	29%	44%	46%	39%	45%	48%	45%	30%	42%	40%	35%
A somewhat serious problem	41%	43%	45%	38%	42%	43%	39%	42%	41%	40%	41%	39%	45%
Not a very serious problem	16%	6%	21%	16%	12%	17%	16%	9%	12%	25%	14%	19%	18%
Not a serious problem at all	2%	2%	5%	2%	1%	1%	0%	1%	2%	4%	3%	2%	2%
Increasing interest rates													
A very serious problem	28%	37%	22%	30%	25%	32%	28%	37%	34%	17%	31%	26%	22%
A somewhat serious problem	35%	40%	31%	36%	48%	34%	35%	42%	37%	29%	36%	35%	35%
Not a very serious problem	26%	18%	32%	24%	19%	26%	26%	16%	22%	35%	23%	29%	27%
Not a serious problem at all	11%	5%	16%	11%	8%	8%	10%	4%	7%	19%	10%	10%	15%

HOW INFLATION/INTEREST RATES ARE IMPACTING HOUSEHOLDS (CANADA VS UNITED STATES)

CTC928. How serious a problem is inflation/increasing interest rates for your household?

Base: All respondents

*% Total Is a problem**	TOTAL CANADA	TOTAL USA	Gap
Weighted n=	1,515	1,002	
Unweighted n=	1,515	1,002	
Inflation	**81%**	**85%**	4
Increasing interest rates	63%	66%	3

**Total A very serious problem + A somewhat serious problem*

IMPRESSION OF THE INFLATION RATE

CTC929. What do you think the current inflation rate is in Canada?
Base: All Canadian respondents (n=1,515)

5%

Median among Canadians

CTC929. What do you think the current inflation rate is in the United States?
Base: All American respondents (n=1,002)

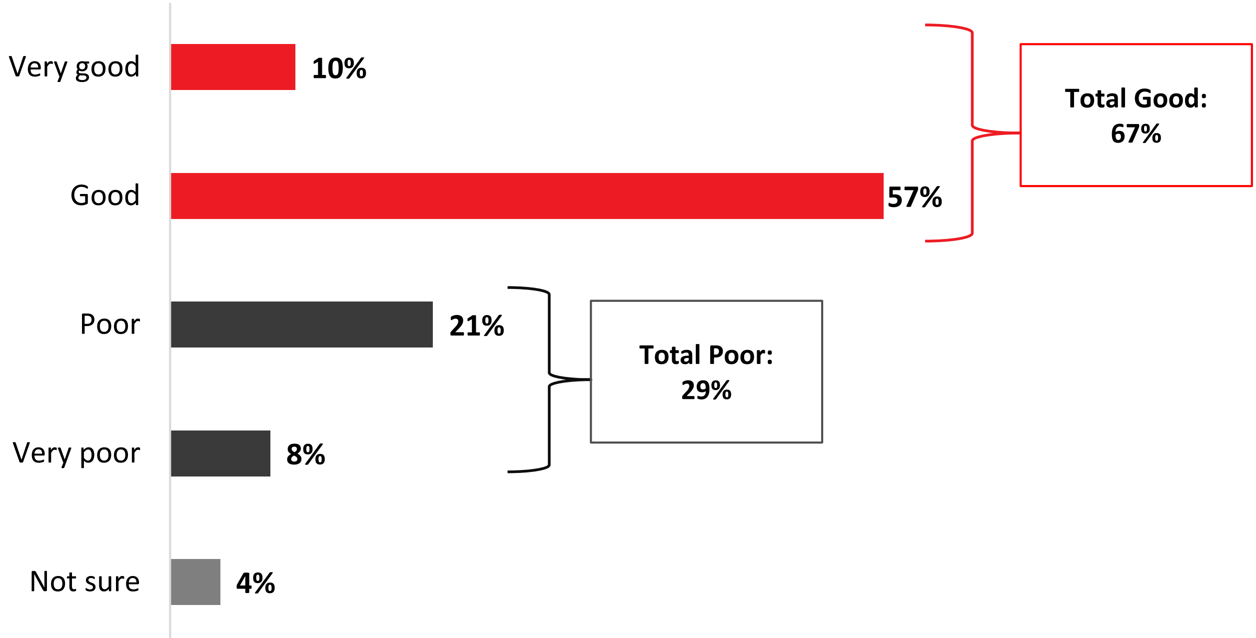
8%

Median among Americans

STATE OF HOUSEHOLD FINANCES (1/2)

CTC930. How would you describe your own household's finances today?

Base: All respondents (n=1,515)



STATE OF HOUSEHOLD FINANCES (2/2)

CTC930. How would you describe your own household's finances today?

Base: All respondents

	TOTAL CANADA	Atl.	QC	ON	MB/SK	AB	BC	18-34	35-54	55+	Urban	Sub-urban	Rural	Data collected from January 7 to 12, 2022	
Weighted n=	1,515	104	355	581	99	170	206	405	524	585	652	552	295	2,399	
Unweighted n=	1,515	100	414	601	125	125	150	451	554	510	662	548	289	2,399	
Total Good	67%	55%	74%	69%	56%	62%	65%	63%	61%	75%	64%	71%	66%	**68%**	-1
Very good	10%	5%	15%	10%	10%	10%	3%	6%	8%	14%	9%	11%	9%	**12%**	-2
Good	57%	50%	59%	59%	47%	52%	62%	57%	53%	62%	55%	60%	57%	**55%**	+2
Total Poor	29%	40%	22%	28%	37%	35%	31%	33%	35%	22%	32%	25%	31%	**28%**	+1
Poor	21%	32%	16%	21%	29%	25%	20%	25%	26%	15%	24%	18%	22%	**22%**	-1
Very poor	8%	8%	6%	8%	8%	10%	11%	8%	9%	7%	8%	7%	8%	**6%**	+2
Not sure	4%	5%	5%	2%	6%	3%	4%	4%	4%	2%	3%	4%	3%	**4%**	-

STATE OF HOUSEHOLD FINANCES (CANADA VS UNITED STATES)

CTC930. How would you describe your own household's finances today?

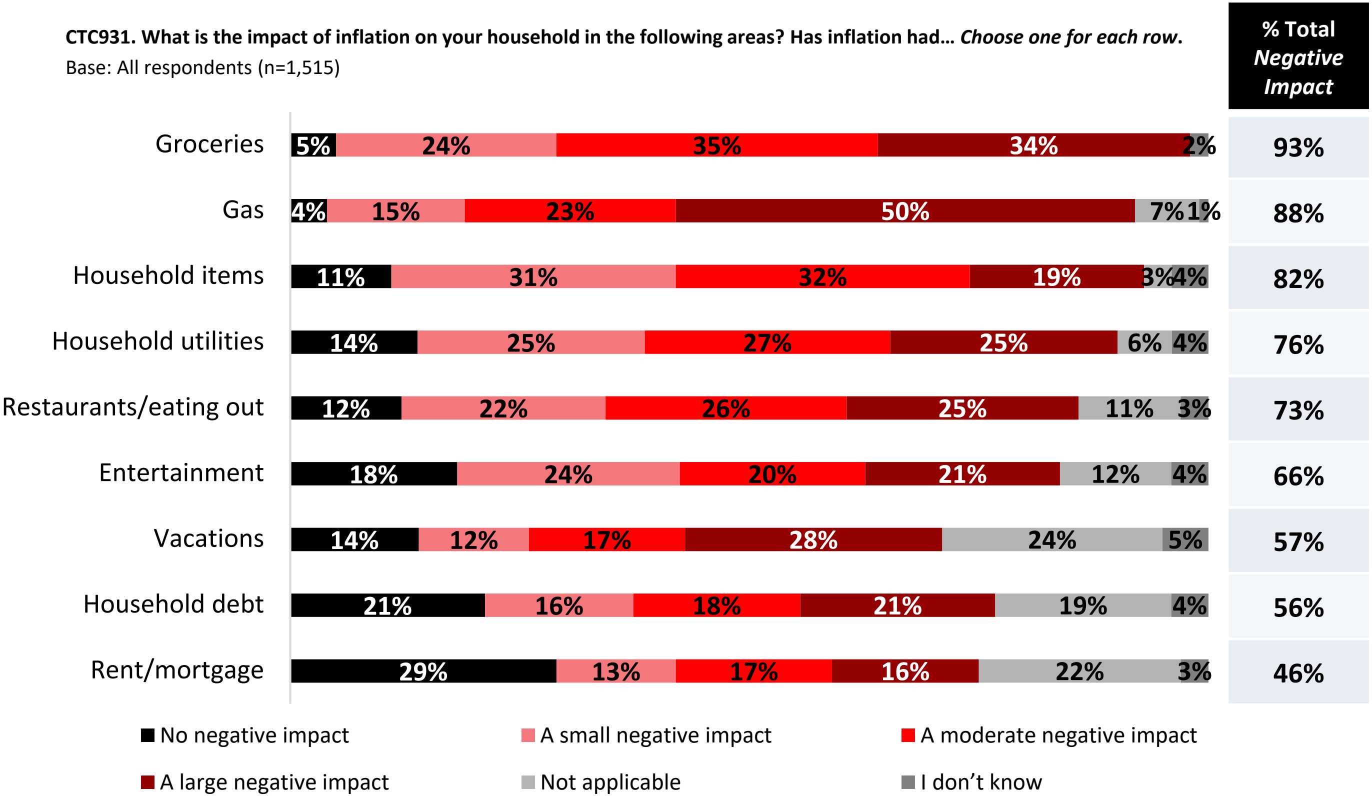
Base: All respondents

	TOTAL CANADA	TOTAL USA	Gap
Weighted n=	1,515	1,002	
Unweighted n=	1,515	1,002	
Total Good	67%	68%	1
Very good	10%	11%	1
Good	57%	57%	-
Total Poor	29%	28%	1
Poor	21%	21%	-
Very poor	8%	7%	1
Not sure	4%	4%	-

NEW QUESTION

IMPACT OF INFLATION (1/2)

CTC931. What is the impact of inflation on your household in the following areas? Has inflation had… ***Choose one for each row*.**
Base: All respondents (n=1,515)



IMPACT OF INFLATION (2/2)

CTC931. What is the impact of inflation on your household in the following areas? Has inflation had… ***Choose one for each row*****.**

Base: All respondents

	TOTAL CANADA	Atl.	QC	ON	MB/SK	AB	BC	18-34	35-54	55+	Urban	Sub-urban	Rural
Weighted n=	1,515	104	355	581	99	170	206	405	524	585	652	552	295
Unweighted n=	1,515	100	414	601	125	125	150	451	554	510	662	548	289
% Total Negative Impact													
Groceries	93%	90%	92%	91%	97%	99%	91%	92%	92%	93%	92%	94%	93%
Gas	88%	84%	83%	89%	95%	96%	89%	87%	87%	90%	82%	92%	95%
Household items	82%	85%	76%	82%	89%	84%	84%	81%	84%	80%	82%	82%	82%
Household utilities	76%	77%	60%	79%	79%	92%	80%	76%	77%	76%	73%	79%	78%
Restaurants/eating out	73%	75%	76%	71%	72%	75%	69%	77%	74%	69%	75%	72%	71%
Entertainment	66%	75%	67%	62%	65%	71%	66%	72%	69%	57%	67%	65%	65%
Vacations	57%	48%	61%	56%	55%	64%	57%	59%	59%	54%	59%	58%	55%
Household debt	56%	63%	51%	55%	60%	62%	58%	61%	67%	43%	57%	55%	54%
Rent/mortgage	46%	42%	50%	44%	46%	41%	51%	61%	51%	31%	49%	44%	42%

IMPACT OF INFLATION (CANADA VS UNITED STATES)

CTC931. What is the impact of inflation on your household in the following areas? Has inflation had… Choose one for each row.

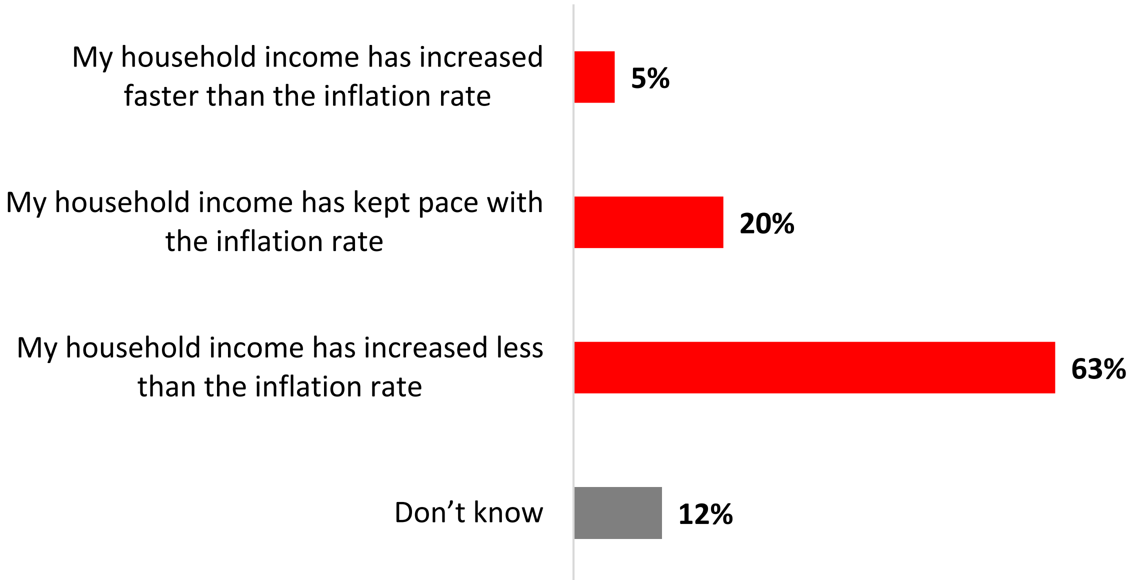
Base: All respondents

	TOTAL CANADA	TOTAL USA	Gap
Weighted n=	1,515	1,002	
Unweighted n=	1,515	1,002	
% Total Negative Impact			
Groceries	**93%**	**85%**	8
Gas	**88%**	**83%**	5
Household items	**82%**	**77%**	5
Household utilities	76%	74%	2
Restaurants/eating out	73%	70%	3
Entertainment	**66%**	**59%**	7
Vacations	57%	54%	3
Household debt	56%	54%	2
Rent/mortgage	46%	42%	4

INCOME KEEPING PACE WITH INFLATION (1/2)

CTC932. Has your household income kept pace with the rate of inflation? ***Please check the statement that best applies to your household.***

Base: All respondents (n=1,515)



INCOME KEEPING PACE WITH INFLATION (2/2)

CTC932. Has your household income kept pace with the rate of inflation? *Please check the statement that best applies to your household.*

Base: All respondents

	TOTAL CANADA	Atl.	QC	ON	MB/SK	AB	BC	18-34	35-54	55+	Urban	Sub-urban	Rural
Weighted n=	1,515	104	355	581	99	170	206	405	524	585	652	552	295
Unweighted n=	1,515	100	414	601	125	125	150	451	554	510	662	548	289
My household income has increased faster than the inflation rate	**5%**	5%	6%	7%	**2%**	4%	5%	**8%**	5%	**4%**	**8%**	4%	**2%**
My household income has kept pace with the inflation rate	**20%**	18%	**16%**	**24%**	17%	18%	18%	21%	19%	19%	20%	21%	17%
My household income has increased less than the inflation rate	**63%**	64%	**72%**	**58%**	65%	66%	61%	**50%**	65%	**71%**	60%	63%	**72%**
Don’t know	**12%**	12%	**7%**	12%	16%	12%	17%	**21%**	10%	**7%**	12%	11%	10%

INCOME KEEPING PACE WITH INFLATION (CANADA VS UNITED STATES)

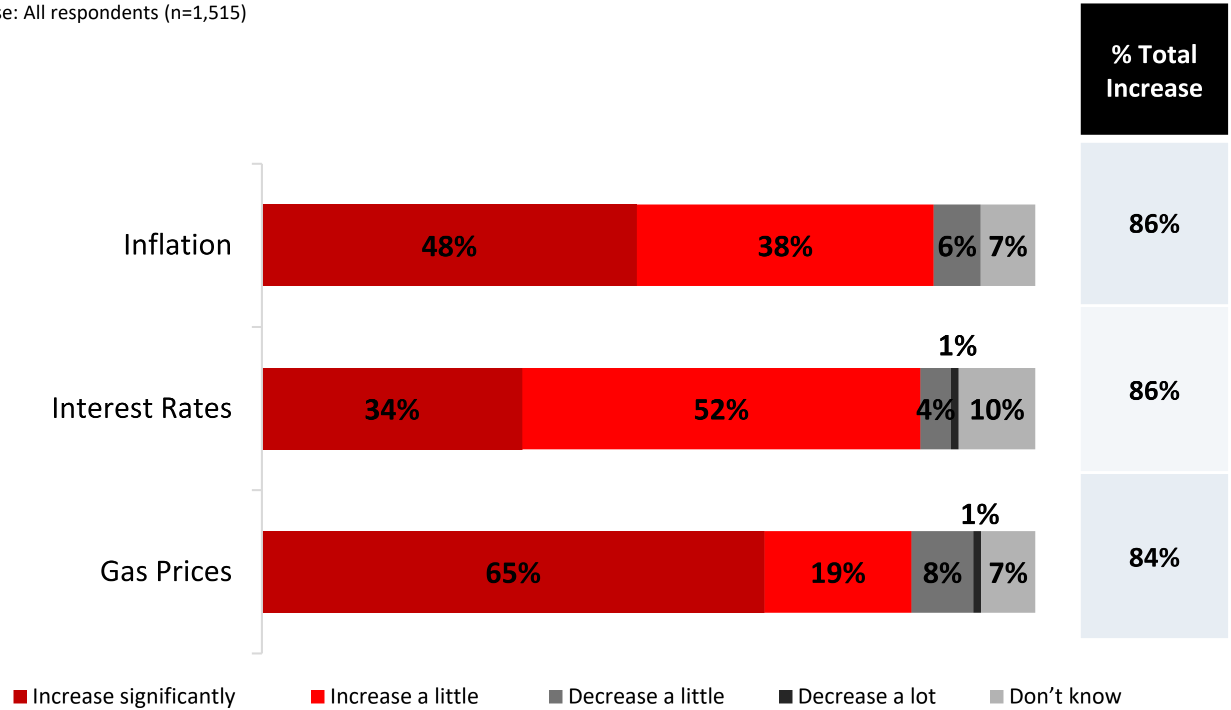
CTC932. Has your household income kept pace with the rate of inflation? Please check the statement that best applies to your household.

Base: All respondents

	TOTAL CANADA	TOTAL USA	Gap
Weighted n=	1,515	1,002	
Unweighted n=	1,515	1,002	
My household income has increased faster than the inflation rate	5%	6%	1
My household income has kept pace with the inflation rate	**20%**	**29%**	9
My household income has increased less than the inflation rate	**63%**	**50%**	13
Don't know	12%	14%	2

PROJECTIONS FOR THE NEXT SIX MONTHS (1/2)

CTC933. To what extent do you think inflation/interest rates/gas prices will increase or decrease six months from now?
Base: All respondents (n=1,515)



PROJECTIONS FOR THE NEXT SIX MONTHS (2/2)

CTC933. To what extent do you think inflation/interest rates/gas prices will increase or decrease six months from now?
Base: All respondents

% Total Increase	TOTAL CANADA	Atl.	QC	ON	MB/SK	AB	BC	18-34	35-54	55+	Urban	Sub-urban	Rural
Weighted n=	1,515	104	355	581	99	170	206	405	524	585	652	552	295
Unweighted n=	1,515	100	414	601	125	125	150	451	554	510	662	548	289
Inflation	86%	82%	90%	85%	84%	86%	86%	83%	85%	89%	86%	85%	87%
Interest Rates	86%	76%	90%	86%	86%	84%	87%	80%	86%	91%	85%	87%	88%
Gas Prices	84%	83%	87%	83%	85%	87%	81%	80%	84%	87%	84%	83%	87%

PROJECTIONS FOR THE NEXT SIX MONTHS (CANADA VS UNITED STATES)

CTC933. To what extent do you think inflation/interest rates/gas prices will increase or decrease six months from now?

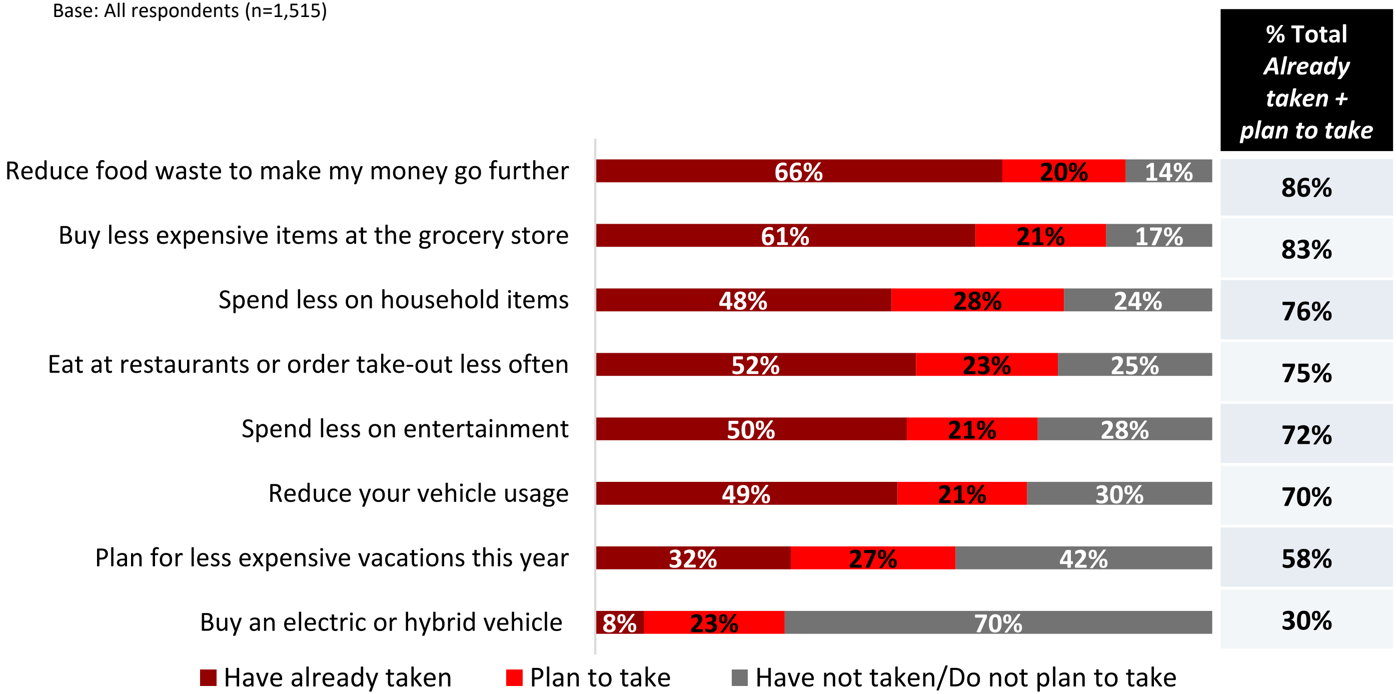
Base: All respondents

% Total Increase	TOTAL CANADA	TOTAL USA	Gap
Weighted n=	1,515	1,002	
Unweighted n=	1,515	1,002	
Inflation	86%	75%	11
Interest Rates	86%	73%	13
Gas Prices	84%	78%	6

ACTIONS TAKEN DUE TO INFLATION (1/2)

CTC934. As a result of rising inflation over the past few months, which of the following actions, if any, have you taken, or do you plan to take?

Base: All respondents (n=1,515)



ACTIONS TAKEN DUE TO INFLATION (2/2)

CTC934. As a result of rising inflation over the past few months, which of the following actions, if any, have you taken, or do you plan to take?
Base: All respondents

% Total Already taken + plan to take	TOTAL CANADA	Atl.	QC	ON	MB/SK	AB	BC	18-34	35-54	55+	Urban	Sub-urban	Rural
Weighted n=	1,515	104	355	581	99	170	206	405	524	585	652	552	295
Unweighted n=	1,515	100	414	601	125	125	150	451	554	510	662	548	289
Reduce food waste to make my money go further	**86%**	87%	88%	86%	85%	85%	83%	89%	87%	**83%**	87%	85%	85%
Buy less expensive items at the grocery store	**83%**	85%	**87%**	82%	80%	81%	85%	84%	84%	81%	84%	81%	83%
Spend less on household items	**76%**	83%	**71%**	79%	83%	74%	76%	79%	80%	**72%**	76%	77%	76%
Eat at restaurants or order take-out less often	**75%**	70%	79%	75%	81%	74%	68%	**81%**	**78%**	**67%**	75%	76%	71%
Spend less on entertainment	**72%**	78%	68%	73%	79%	70%	68%	**76%**	**76%**	**65%**	73%	72%	69%
Reduce your vehicle usage	**70%**	74%	67%	72%	72%	67%	69%	72%	70%	69%	68%	69%	**75%**
Plan for less expensive vacations this year	**58%**	50%	**65%**	58%	49%	63%	54%	**67%**	61%	**50%**	58%	61%	55%
Buy an electric or hybrid vehicle	**30%**	**21%**	**43%**	31%	**19%**	**17%**	27%	**40%**	31%	**23%**	30%	33%	26%

ACTIONS TAKEN DUE TO INFLATION (CANADA VS UNITED STATES)

CTC934. As a result of rising inflation over the past few months, which of the following actions, if any, have you taken, or do you plan to take?

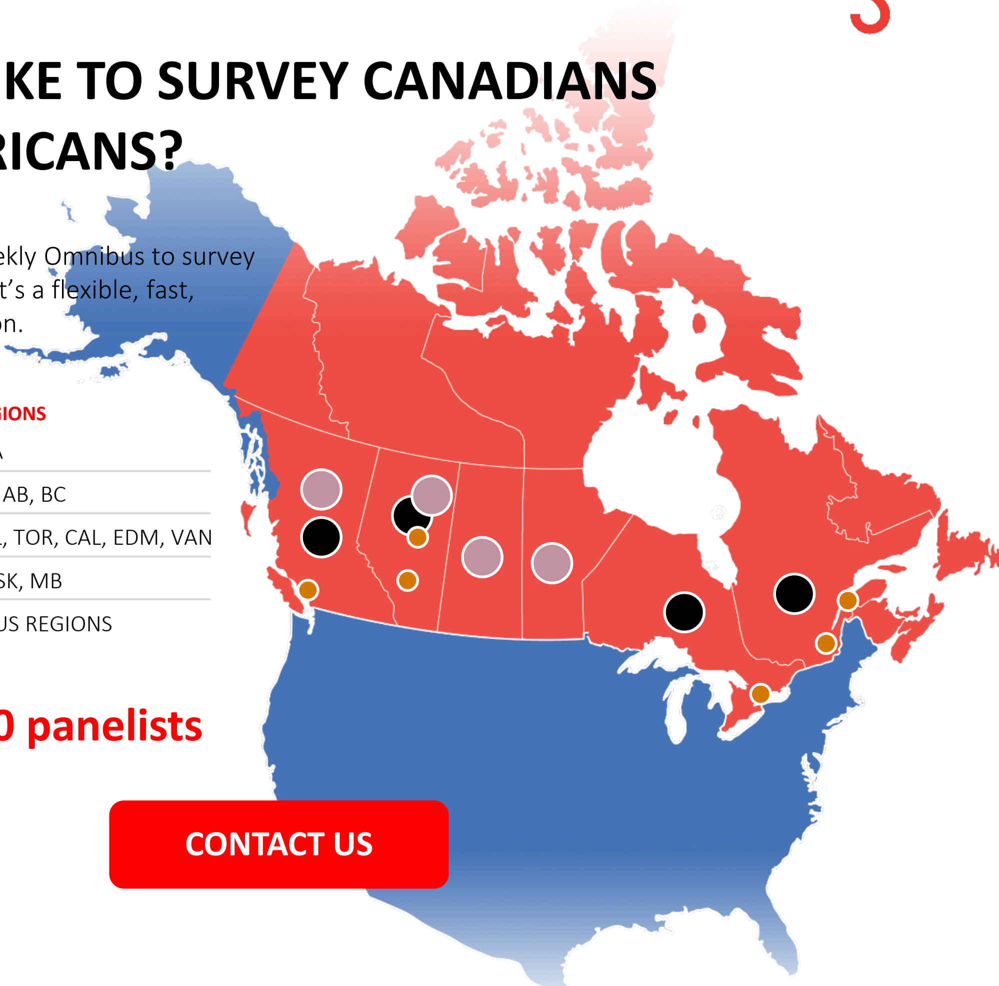
Base: All respondents

	TOTAL CANADA	TOTAL USA	Gap
Weighted n=	1,515	1,002	
Unweighted n=	1,515	1,002	
% Total Already taken + plan to take			
Reduce food waste to make my money go further	**86%**	**75%**	11
Buy less expensive items at the grocery store	**83%**	**72%**	11
Spend less on household items	**76%**	**68%**	8
Eat at restaurants or order take-out less often	**75%**	**67%**	8
Spend less on entertainment	**72%**	**65%**	7
Reduce your vehicle usage	**70%**	**64%**	6
Plan for less expensive vacations this year	**58%**	**49%**	9
Buy an electric or hybrid vehicle	**30%**	**26%**	4

WOULD YOU LIKE TO SURVEY CANADIANS AND/OR AMERICANS?

Add your question(s) to our weekly Omnibus to survey the population of your choice! It's a flexible, fast, efficient and economical solution.

OMNIBUS TYPE	n=	REGIONS
NATIONAL	1,500	CANADA
PROVINCIAL	1,000	QC, ON, AB, BC
MUNICIPAL	500	QC, MTL, TOR, CAL, EDM, VAN
WESTERN	1,500	BC, AB, SK, MB
AMERICAN	1,000	4 CENSUS REGIONS



More than **400,000 panelists** at your disposal

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APPENDIX

DETAILED METHODOLOGY

WEIGHTED AND UNWEIGHTED SAMPLE

The table below presents the Canadian geographic distribution of respondents before weighting.

Province	Unweighted	Weighted
British Columbia	150	206
Alberta	125	170
Manitoba/Saskatchewan	125	99
Ontario	601	581
Quebec	414	355
Atlantic	104	100

The table below presents the American geographic distribution of respondents before weighting.

US Region	Unweighted	Weighted
NorthEast	200	179
MidWest	182	217
South	380	372
West	240	233

DETAILED METHODOLOGY

WEIGHTED AND UNWEIGHTED SAMPLE FOR CANADA

The following tables present the demographic distribution of respondents according to gender, age and language (mother tongue) for Canada.

GENDER	Unweighted	Weighted
Male	795	736
Female	720	779

AGE	Unweighted	Weighted
Between 18 and 34	451	405
Between 35 and 54	554	524
55 or over	510	585

LANGUAGE (MOTHER TONGUE)	Unweighted	Weighted
English	937	1,002
French	367	315
Other	209	193

The sample thus collected has a minimum weighting factor of 0.2055 and a maximum weighting factor of 4.3663. The weighted variance is 0.3053.

DETAILED METHODOLOGY

WEIGHTED AND UNWEIGHTED SAMPLE FOR THE UNITED STATES

The following tables present the demographic distribution of respondents according to gender and age for the United States.

GENDER	Unweighted	Weighted
Male	500	487
Female	502	515

AGE	Unweighted	Weighted
Between 18 and 29	83	178
Between 30 and 39	179	215
Between 40 and 49	200	186
Between 50 and 64	290	251
65 or older	250	172

The sample thus collected has a minimum weighting factor of 0.3142 and a maximum weighting factor of 4.2197. The weighted variance is 0.4099.

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  Data modelling and analysis
- **Leger Opinion (LEO)**
  Panel management
- **Leger Community**
  Online community management
- **Leger Digital**
  Digital strategy and user experience
- **International research**
  Worldwide Independent Network (WIN)

600
EMPLOYEES

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OUR COMMITMENTS TO QUALITY

Leger is a member of the Canadian Research Insights Council (CRIC), the industry association for the market/survey/insights research industry.

Leger is a member of ESOMAR (European Society for Opinion and Market Research), the global association of opinion polls and marketing research professionals. As such, Leger is committed to applying the international ICC/ESOMAR code of Market, Opinion and Social Research and Data Analytics.

Leger is also a member of the Insights Association, the American Association of Marketing Research Analytics.

Leger is a sponsor of CAIP Canada, Canada's professional body for Certified Analytics and Insights Professionals who uphold CRIC's marketing research and public opinion research standards. CAIP Canada is globally endorsed by ESOMAR and the MRII/University of Georgia.

We Know Canadians