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Methodology

Leger

Methodology

Method

Canadian online survey via Leger's LEO panel (n=938/ 18 – 39 years old and eligible to vote in Canada)

Respondents had the option of completing the survey in English or in French and were randomly recruited using LEO's online panel.

When

May 24-26 and 1st to 3rd of June 2024

Margin of error

For comparison purposes, a probability sample of this size yields a margin of error no greater than ±3.2%, (19 times out of 20)

Weighting

Results were weighted according to **age, gender, mother tongue, region, education and presence of children in the household** in order to ensure a representative sample of the Canadian population.

Methodology

Significant differences

Data in bold red characters indicate a significantly lower proportion than that of other respondents. Conversely, data in bold green characters indicate a significantly higher proportion that that of other respondents.

Rounded data

The data presented have been rounded. However, the data before rounding were used to calculate the amounts presented and therefore may not correspond to the manual addition of these figures.
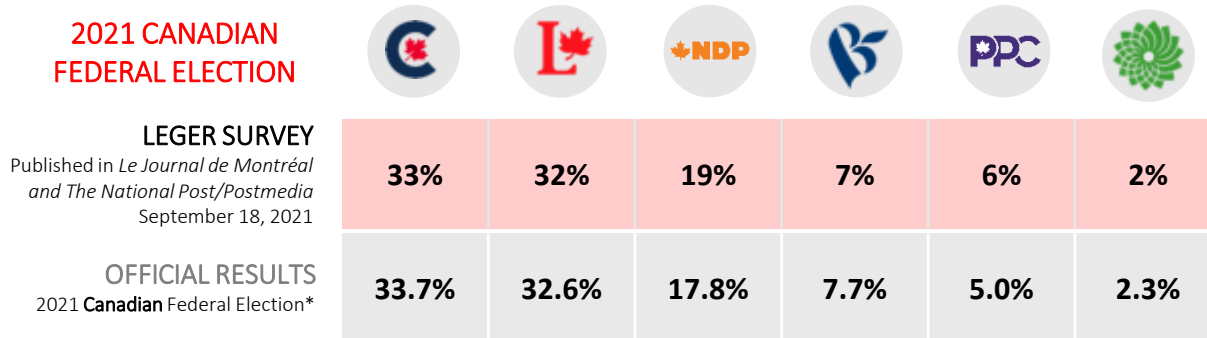
Questions

Have questions about the data presented in this report? Please contact Andrew Enns, Executive Vice-President, Central Canada at the following e-mail addresses: aenns@leger360.com

A more detailed methodology is presented in the Appendix.

Committment to Accuracy

Leger is the polling firm that has presented the most accurate election survey 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 (New York).

Leger is the largest Canadian-owned market research and analytics company, with more than 600 employees in eight Canadian and US offices. Leger has been working with prestigious clients since 1986.

2021 CANADIAN FEDERAL ELECTION						
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%**

Detailed Results

GenZ and Millennials overwhelming believe that starting their adult life is harder for them compared to how it was for their parents.

Q1 Do you believe that beginning your adult life, such as obtaining a quality post-secondary education, establishing a career and/or starting a family in your own home, is harder or easier for you today compared to how it was for your parents?
Base: All respondents (n=938)

Harder	68%
About the same	13%
Easier	13%
I don't know	5%
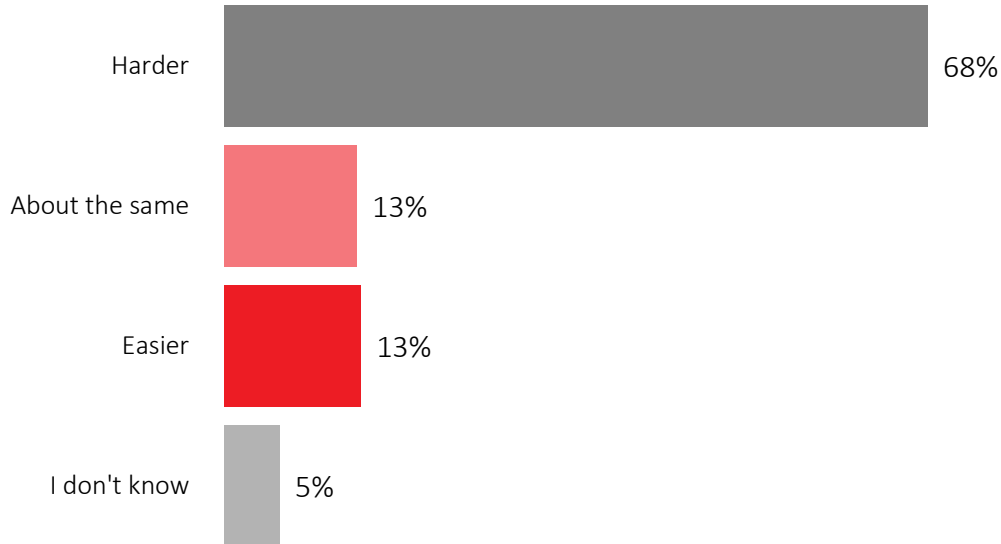
Women, Atlantic Canadians, non-BIPoC individuals, and notably, both those who currently own a home and who feel they are unlikely to own one in the near future, are all more likely to believe beginning their adult life, such as obtaining a quality post-secondary education, establishing a career and/or starting a family in their own home, is harder for them than it was for their parents.
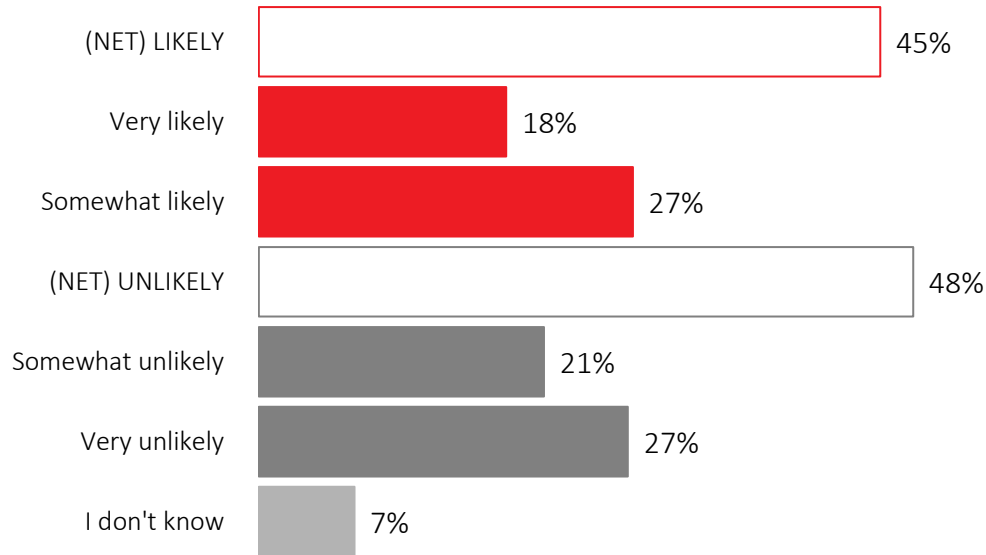
Q1 Do you believe that beginning your adult life, such as obtaining a quality post-secondary education, establishing a career and/or starting a family in your own home, is harder or easier for you today compared to how it was for your parents?
Base: All respondents (n=938)

	Total	Gender		Age		Region						Ethnicity		Home Ownership		
		Male	Female	18-27	28-39	BC	Alberta	MB/SK	Ontario	Quebec	Atlantic Canada	White	BIPoC	Own a home	Likely to own (NET)	Unikely to own (NET)
n=	938	499	439	317	621	100	83	68	360	280	47	591	339	288	327	277
Harder	68%	62%	75%	65%	70%	58%	72%	66%	70%	69%	78%	73%	61%	77%	56%	77%
About the same	13%	16%	10%	13%	13%	17%	12%	10%	13%	13%	4%	13%	13%	11%	16%	10%
Easier	13%	16%	10%	16%	12%	19%	11%	20%	12%	12%	8%	10%	19%	9%	23%	9%
I don't know	5%	6%	5%	6%	5%	7%	4%	4%	5%	6%	11%	5%	6%	3%	5%	4%

Younger Canadians are split as to how they feel about future home ownership, with 45% feeling that they'll own in the next ten years and 48% believing it's unlikely to happen for them.

Q2 How likely is it you will be able to own a house or condominium in the next 10 years?
Base: Excluding those who already own a home (n=650)

(NET) LIKELY	45%
Very likely	18%
Somewhat likely	27%
(NET) UNLIKELY	48%
Somewhat unlikely	21%
Very unlikely	27%
I don't know	7%

27% currently own a house or condo.

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Those who feel they are likely to own a house or condominium in the next ten years are men, those earning $60K or more, and those who identify as BIPoC. Quebecers are less confident they will own vs. Ontarians.

Q2 How likely is it you will be able to own a house or condominium in the next 10 years?
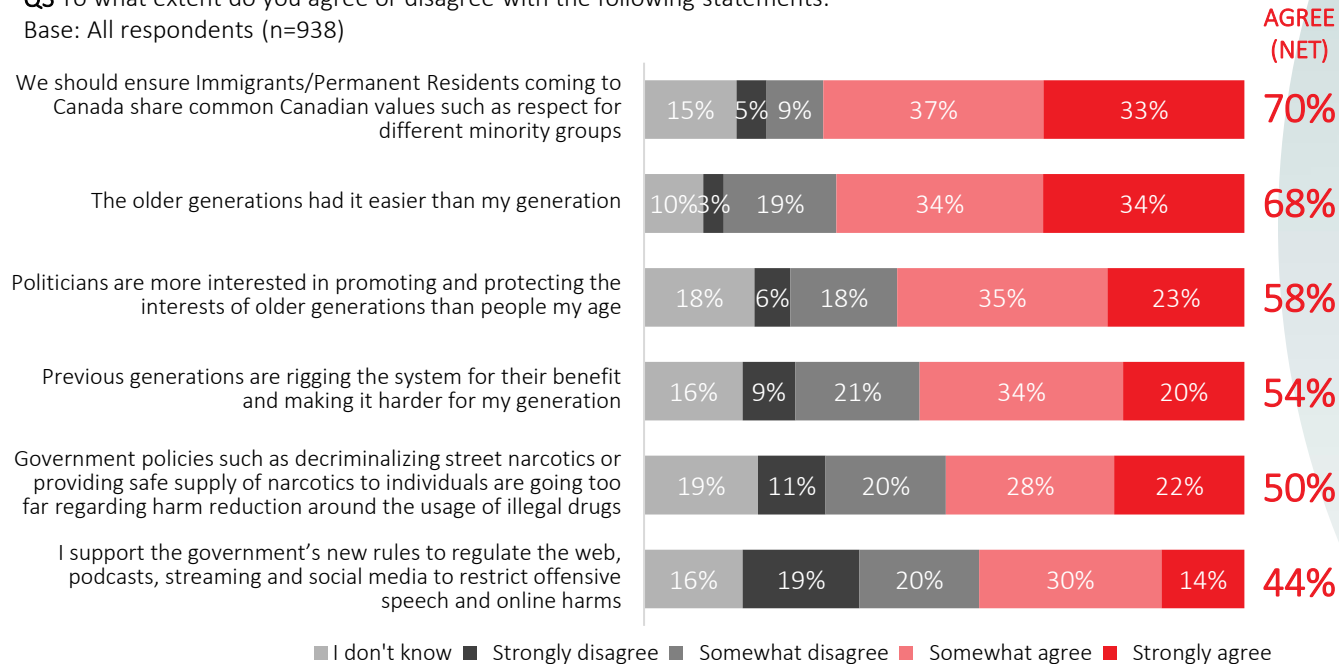Base: Excluding those who already own a home (n=650)

	Total	Gender		Age		Region						Ethnicity		Income		
		Male	Female	18-27	28-39	BC	Alberta	MB/SK	Ontario	Quebec	Atlantic Canada	White	BIPoC	<$60K	$60K-<$100K	$100K+
n=	650	369	281	271	379	85	46	47	264	180	28	364	280	231	197	181
(NET) LIKELY	45%	50%	41%	51%	41%	43%	54%	49%	42%	48%	48%	41%	52%	36%	50%	61%
Very likely	18%	21%	14%	21%	16%	12%	20%	22%	16%	21%	32%	17%	20%	14%	18%	27%
Somewhat likely	27%	28%	26%	30%	26%	31%	34%	27%	26%	27%	16%	24%	33%	22%	33%	34%
(NET) UNLIKELY	48%	43%	53%	46%	49%	46%	42%	47%	53%	42%	43%	52%	41%	55%	46%	33%
Somewhat unlikely	21%	22%	20%	24%	19%	20%	19%	26%	23%	18%	12%	20%	22%	19%	22%	22%
Very unlikely	27%	21%	33%	22%	31%	26%	22%	21%	30%	24%	31%	33%	19%	36%	24%	11%
I don't know	7%	8%	6%	4%	9%	11%	4%	4%	5%	10%	9%	7%	6%	8%	4%	6%

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The highest agreement relates to immigrants being required to share common Canadian values and the notion older generations have benefited at their generation's expense. Less than half of Gen-Z/Millennials support government rules to regulate the internet.

Q3 To what extent do you agree or disagree with the following statements:
Base: All respondents (n=938)

Statement	I don't know	Strongly disagree	Somewhat disagree	Somewhat agree	Strongly agree	AGREE (NET)
We should ensure Immigrants/Permanent Residents coming to Canada share common Canadian values such as respect for different minority groups	15%	5%	9%	37%	33%	70%
The older generations had it easier than my generation	10%	3%	19%	34%	34%	68%
Politicians are more interested in promoting and protecting the interests of older generations than people my age	18%	6%	18%	35%	23%	58%
Previous generations are rigging the system for their benefit and making it harder for my generation	16%	9%	21%	34%	20%	54%
Government policies such as decriminalizing street narcotics or providing safe supply of narcotics to individuals are going too far regarding harm reduction around the usage of illegal drugs	19%	11%	20%	28%	22%	50%
I support the government's new rules to regulate the web, podcasts, streaming and social media to restrict offensive speech and online harms	16%	19%	20%	30%	14%	44%

■ I don't know   ■ Strongly disagree   ■ Somewhat disagree   ■ Somewhat agree   ■ Strongly agree

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Male GenZ/Millennials are more in agreement that politicians are more interested in protecting interests of older generations and that previous generations are 'rigging the system'. They also believe decriminalization of drugs is going too far. Quebecer residents are least likely to agree with many of these statements.

Q3 To what extent do you agree or disagree with the following statements:
Base: All respondents (n=938)

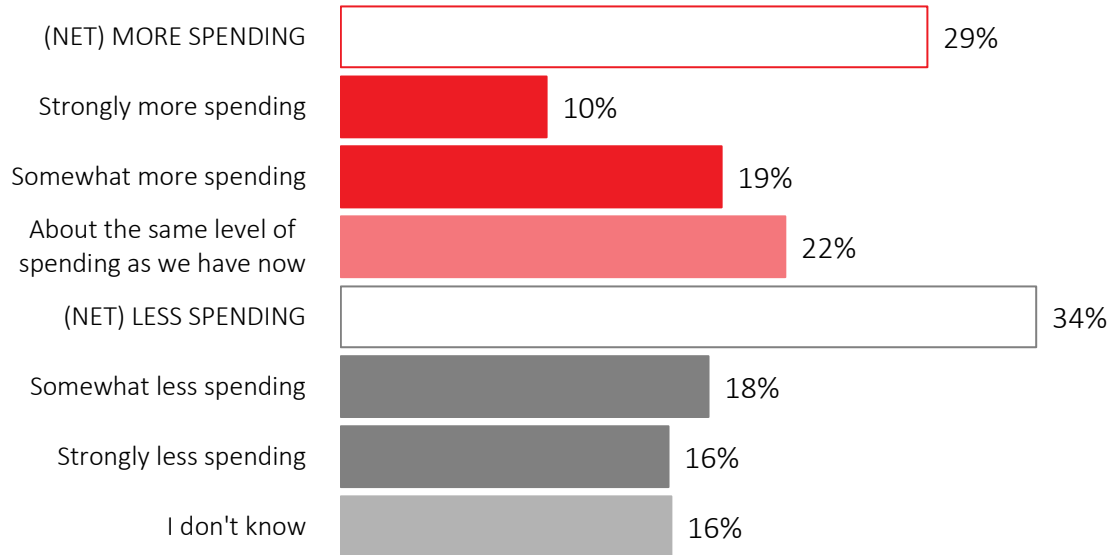|	Total	Gender		Age		Region						Ethnicity	
		Male	Female	18-27	28-39	BC	Alberta	MB/SK	Ontario	Quebec	Atlantic Canada	White	BIPoC
n=	938	499	439	317	621	100	83	68	360	280	47	591	339
We should ensure Immigrants/Permanent Residents coming to Canada share common Canadian values such as respect for different minority groups	70%	71%	69%	72%	69%	70%	68%	73%	70%	72%	65%	69%	72%
The older generations had it easier than my generation	68%	67%	69%	69%	67%	71%	64%	71%	71%	60%	74%	69%	67%
Politicians are more interested in promoting and protecting the interests of older generations than people my age	58%	63%	53%	64%	54%	71%	57%	60%	55%	56%	51%	54%	65%
Previous generations are rigging the system for their benefit and making it harder for my generation	54%	58%	50%	56%	53%	61%	49%	57%	57%	43%	62%	50%	62%
Government policies such as decriminalizing street narcotics or providing safe supply of narcotics to individuals are going too far regarding harm reduction around the usage of illegal drugs	50%	57%	42%	51%	49%	57%	54%	70%	51%	33%	48%	44%	60%
I support the government's new rules to regulate the web, podcasts, streaming and social media to restrict offensive speech and online harms	44%	46%	43%	49%	42%	52%	40%	35%	44%	47%	36%	40%	52%

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GenZ and Millennials are slightly more likely to support less government spending (34%) than more spending (29%), but 22% feel it should remain at the current level.

Q4 Please indicate which point of view you more closely associate with:

A We need more government spending to support programs and services today and in the future.

B We need less government spending as I am worried about generations like mine being overly taxed in future to pay for today's debt.

Base: Those asked (n=870)

Category	Value
(NET) MORE SPENDING	29%
Strongly more spending	10%
Somewhat more spending	19%
About the same level of spending as we have now	22%
(NET) LESS SPENDING	34%
Somewhat less spending	18%
Strongly less spending	16%
I don't know	16%

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GenZ/Millennials who believe there should be <u>more</u> government spending are men, those in BC, non-homeowners, and who believe starting their adult life is easier than it was for their parents. Albertans feel the spending should remain the same, while residents of SK/MB, say there should be <u>less</u> spending.

Q4 Respondents were split with 435 each being provided one of the following statements
A We need more government spending to support programs and services today and in the future.
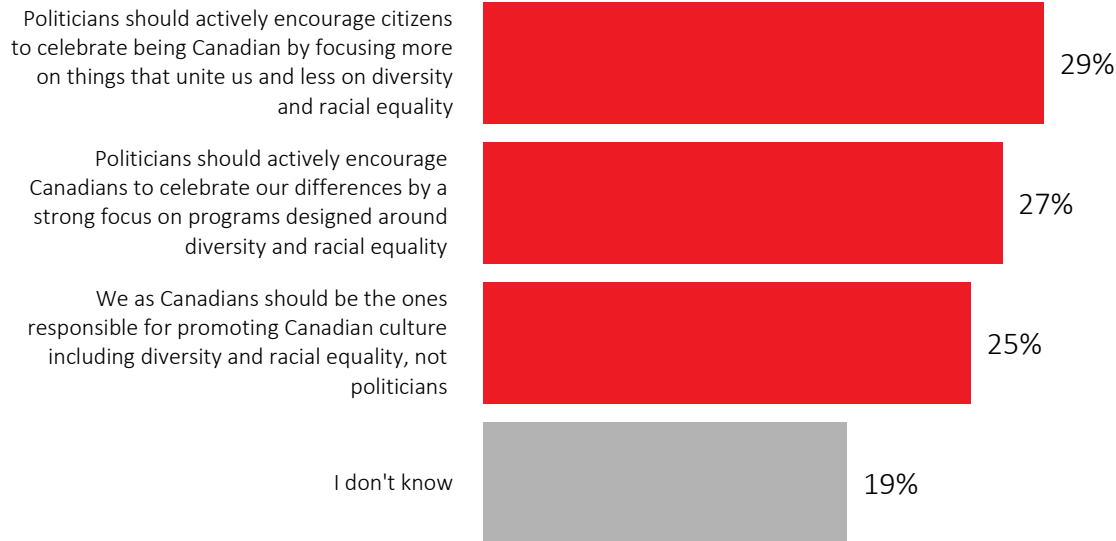*B We need less government spending as I am worried about generations like mine being overly taxed in future to pay for today's debt.*
Please indicate which point of view you more closely associate with Base: Those asked (n=870)

	Total	Gender		Age		Region						Ethnicity		Adult Life vs. Parents		
		Male	Female	18-27	28-39	BC	Alberta	MB/SK	Ontario	Quebec	Atlantic Canada	White	BIPoC	Harder	About the same	Easier
n=	870	457	413	305	565	98	67	64	336	260	45	549	313	581	122	125
(NET) **More spending**	29%	33%	24%	34%	25%	43%	26%	23%	27%	24%	32%	27%	32%	27%	25%	44%
Strongly more spending	10%	13%	7%	12%	9%	16%	8%	8%	9%	7%	18%	8%	13%	11%	8%	12%
Somewhat more spending	19%	21%	16%	22%	16%	27%	18%	15%	18%	17%	14%	18%	19%	17%	17%	33%
About the **same level** of spending as we have now	22%	27%	17%	23%	21%	20%	31%	18%	20%	25%	13%	19%	26%	17%	42%	29%
(NET) **Less spending**	34%	27%	40%	28%	37%	28%	34%	46%	34%	31%	39%	36%	30%	40%	25%	20%
Somewhat less spending	18%	14%	21%	17%	18%	15%	18%	25%	18%	16%	24%	18%	17%	21%	10%	13%
Strongly less spending	16%	13%	19%	12%	19%	13%	16%	21%	16%	15%	16%	18%	13%	19%	14%	7%
I don't know	16%	13%	19%	14%	17%	9%	9%	13%	19%	20%	16%	18%	12%	15%	9%	7%

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GenZ and Millennials are divided on whether politicians should focus <u>less</u> on diversity or <u>more</u> on diversity. Similar numbers believe it should be Canadians who promote our culture rather than politicians.

Q5 Below are three different points of view regarding the role Canadian politicians should play regarding diversity and racial equality in Canada.
Base: All respondents (n=938)

Category	Percentage
Politicians should actively encourage citizens to celebrate being Canadian by focusing more on things that unite us and less on diversity and racial equality	29%
Politicians should actively encourage Canadians to celebrate our differences by a strong focus on programs designed around diversity and racial equality	27%
We as Canadians should be the ones responsible for promoting Canadian culture including diversity and racial equality, not politicians	25%
I don't know	19%

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Men (vs. women) are more likely to believe politicians should encourage a focus on things that unite us rather than on diversity, along with those in Alberta (vs. Ontarians). Those in BC and BIPoC GenZ/Millennials feel there should be a strong focus on including diversity and racial equality.
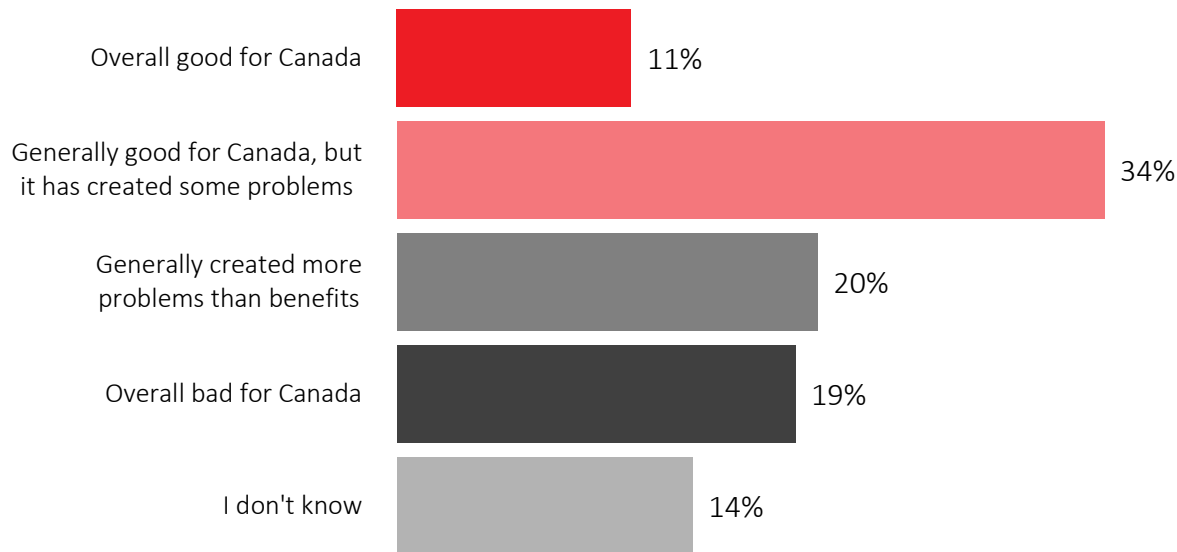
Q5 Below are three different points of view regarding the role Canadian politicians should play regarding diversity and racial equality in Canada.
Base: All respondents (n=938)

	Total	Gender		Age		Region						Ethnicity	
		Male	Female	18-27	28-39	BC	Alberta	MB/SK	Ontario	Quebec	Atlantic Canada	White	BIPoC
n=	938	499	439	317	621	100	83	68	360	280	47	591	339
Politicians should actively encourage citizens to celebrate being Canadian by focusing more on things that unite us and less on diversity and racial equality	29%	35%	23%	30%	28%	24%	39%	30%	26%	31%	27%	31%	25%
Politicians should actively encourage Canadians to celebrate our differences by a strong focus on programs designed around diversity and racial equality	27%	26%	28%	34%	23%	38%	28%	24%	25%	23%	29%	22%	35%
We as Canadians should be the ones responsible for promoting Canadian culture including diversity and racial equality, not politicians	25%	23%	27%	18%	29%	24%	21%	25%	27%	24%	29%	26%	25%
I don't know	19%	16%	22%	18%	19%	14%	11%	21%	22%	22%	15%	21%	15%

![Leger]

Young adults are divided when it comes to the benefits of the government's current immigration plan. 45% say current immigration levels have been good or generally good for the country while 39% have concerns about the current pace.

Q6 Since 2021, Canada has been welcoming roughly 500,000 new Canadians every year. This immigration level is expected to be maintained by the federal government until 2026. In your view, has this level of immigration been good for Canada or bad?
Base: All respondents (n=938)

Category	Percent
Overall good for Canada	11%
Generally good for Canada, but it has created some problems	34%
Generally created more problems than benefits	20%
Overall bad for Canada	19%
I don't know	14%

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GenZ and Millennials who feel starting their adult life is harder than it was for their parents are more likely to believe the levels of immigration is overall a bad thing for Canada.
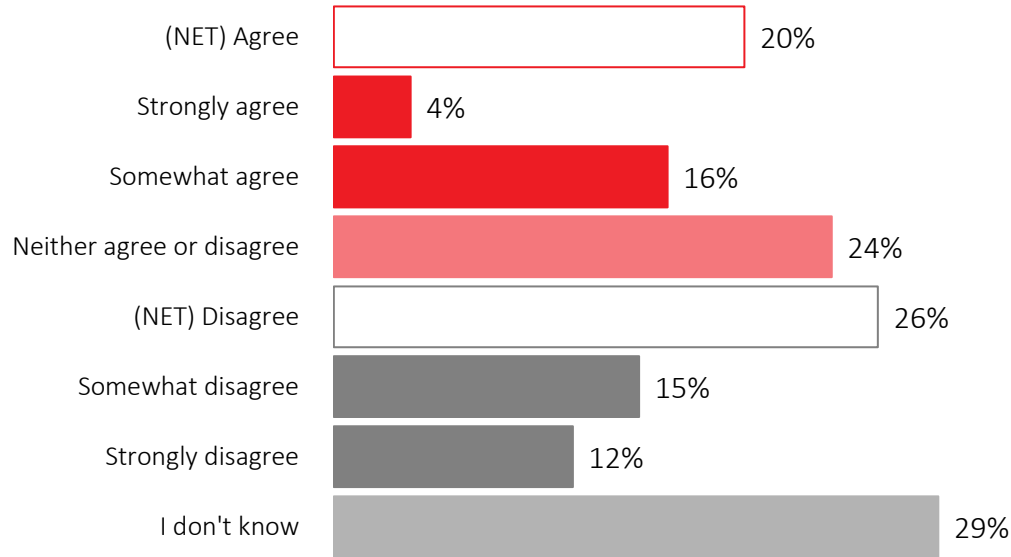
Q6 Since 2021, Canada has been welcoming roughly 500,000 new Canadians every year. This immigration level is expected to be maintained by the federal government until 2026. In your view, has this level of immigration been good for Canada or bad?
Base: All respondents (n=938)

		Gender		Age		Region						Ethnicity		Adult Life vs. Parents		
	Total	Male	Female	18-27	28-39	BC	Alberta	MB/SK	Ontario	Quebec	Atlantic Canada	White	BIPoC	Harder	About the same	Easier
n=	938	499	439	317	621	100	83	68	360	280	47	591	339	625	128	141
Overall good for Canada	11%	13%	10%	15%	9%	16%	11%	8%	10%	13%	10%	11%	12%	10%	14%	14%
Generally good for Canada, but it has created some problems	34%	31%	38%	38%	32%	38%	39%	40%	34%	31%	24%	32%	38%	35%	31%	49%
Generally created more problems than benefits	20%	24%	17%	20%	21%	14%	19%	19%	21%	22%	33%	20%	21%	19%	27%	22%
Overall bad for Canada	19%	20%	19%	14%	22%	17%	23%	19%	20%	18%	19%	21%	17%	23%	17%	6%
I don't know	14%	13%	16%	12%	16%	15%	7%	14%	16%	16%	13%	15%	12%	13%	10%	9%

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It appears over half of GenZ/Millennials (53%) have not heard enough about the budget to form a clear impression. This suggests the government is having difficulty getting its message across to this population.

Q7 The primary focus of the recent Federal Budget released a few weeks ago was Generational Fairness.
To what extent do you agree or disagree that the 2024 Federal Budget will make things fairer for your generation?
Base: All respondents (n=938)

Category	Percentage
(NET) Agree	20%
Strongly agree	4%
Somewhat agree	16%
Neither agree or disagree	24%
(NET) Disagree	26%
Somewhat disagree	15%
Strongly disagree	12%
I don't know	29%

Men and Western Canadians are more likely to agree the recent Federal Budget will make things fairer for their generation. Those in the Prairies, Ontario, and Quebec disagree that it will.

Q7 The primary focus of the recent Federal Budget released a few weeks ago was Generational Fairness. To what extent do you agree or disagree that the 2024 federal budget will make things fairer for your generation?
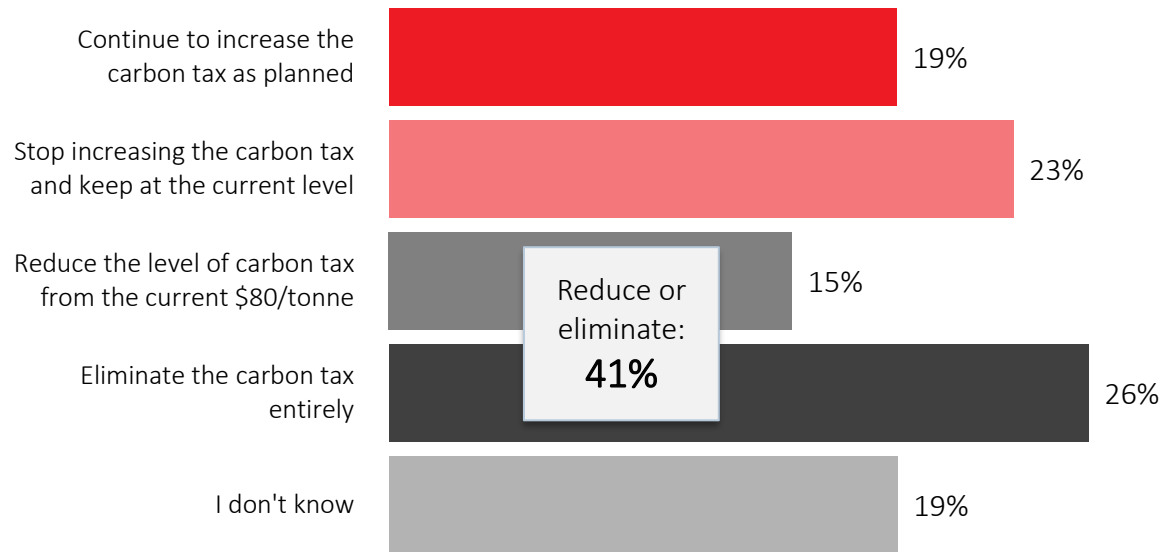Base: All respondents (n=938)

	Total	Gender		Age		Region						Ethnicity	
		Male	Female	18-27	28-39	BC	Alberta	MB/SK	Ontario	Quebec	Atlantic Canada	White	BIPoC
n=	938	499	439	317	621	100	83	68	360	280	47	591	339
(NET) **Agree**	20%	24%	16%	25%	17%	30%	29%	18%	17%	15%	20%	18%	24%
Strongly agree	4%	6%	2%	4%	4%	5%	5%	5%	3%	2%	4%	3%	4%
Somewhat agree	16%	18%	14%	21%	13%	25%	24%	13%	14%	12%	16%	15%	19%
Neither agree or disagree	24%	27%	21%	24%	24%	22%	20%	18%	25%	26%	35%	23%	27%
(NET) **Disagree**	26%	27%	26%	23%	29%	15%	28%	33%	30%	25%	24%	27%	26%
Somewhat disagree	15%	15%	15%	16%	14%	7%	16%	17%	16%	15%	16%	16%	13%
Strongly disagree	12%	11%	12%	7%	14%	7%	12%	16%	14%	10%	8%	11%	13%
I don't know	29%	22%	37%	28%	30%	34%	23%	31%	28%	35%	21%	33%	24%

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These generations are somewhat divided on what to do with the carbon tax. 41% feel the Federal Government should reduce the level of carbon tax or eliminate it entirely, while 23% say it should be frozen at its current level. Only 19% say it should increase as planned.

Q8 Do you think the Federal government should....
Base: All respondents (n=938)

Response	Percentage
Continue to increase the carbon tax as planned	19%
Stop increasing the carbon tax and keep at the current level	23%
Reduce the level of carbon tax from the current $80/tonne	15%
Eliminate the carbon tax entirely	26%
I don't know	19%

Reduce or eliminate:
41%

GenZ/Millennials in the Prairies, Ontario, and the Atlantic are more likely to say eliminate the carbon tax entirely, along with those who say adulthood is harder for them compared to their parents.
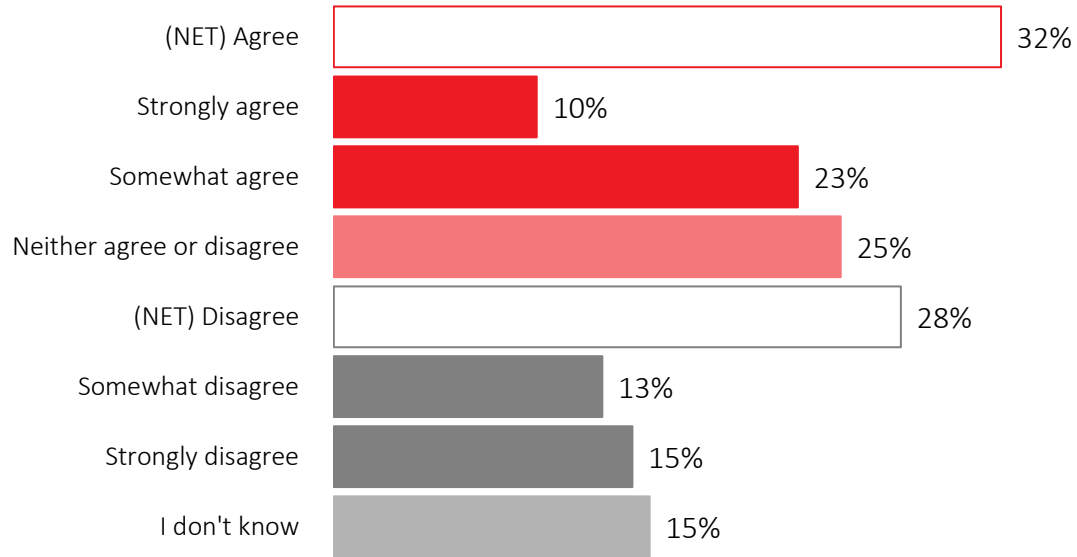
Q8 Do you think the Federal government should….
Base: All respondents (n=938)

	Total	Gender		Age		Region						Ethnicity		Adult Life vs. Parents		
		Male	Female	18-27	28-39	BC	Alberta	MB/SK	Ontario	Quebec	Atlantic Canada	White	BIPoC	Harder	About the same	Easier
n=	938	499	439	317	621	100	83	68	360	280	47	591	339	625	128	141
Continue to increase the carbon tax as planned	19%	21%	16%	21%	17%	31%	15%	14%	17%	22%	3%	19%	18%	19%	12%	27%
Stop increasing the carbon tax and keep at the current level	23%	26%	19%	25%	21%	18%	30%	16%	21%	25%	31%	19%	29%	20%	27%	34%
Reduce the level of carbon tax from the current $80/tonne	15%	12%	17%	16%	14%	15%	18%	14%	15%	14%	11%	16%	13%	14%	26%	13%
Eliminate the carbon tax entirely	26%	25%	26%	19%	29%	22%	27%	38%	28%	16%	35%	29%	20%	29%	24%	17%
I don't know	19%	16%	21%	19%	18%	15%	11%	17%	20%	24%	20%	18%	19%	18%	10%	9%

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Younger generations are divided on how beneficial to their future is the present investment in E-vehicle and battery manufacturing will be. A third (32%) think it will be beneficial, but 28% disagree and 25% are on the fence.

Q9 Federal and provincial governments are providing billions of dollars in subsidies to attract companies like Ford and Honda to build electric vehicle (EV) and lithium battery manufacturing plants in Canada. Do you agree or disagree that spending billions on these EV plants will be of significant benefit to your generation?
Base: All respondents (n=938)

Response	%
(NET) Agree	32%
Strongly agree	10%
Somewhat agree	23%
Neither agree or disagree	25%
(NET) Disagree	28%
Somewhat disagree	13%
Strongly disagree	15%
I don't know	15%

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Those most in agreement that spending billions on EV plants will be of significant benefit to their generation are men, those in BC, and those who say starting their adult life is easier than it was for their parents.

Q9 Federal and provincial governments are providing billions of dollars in subsidies to attract companies like Ford and Honda to build electric vehicle (EV) and lithium battery manufacturing plants in Canada. Do you agree or disagree that spending billions on these EV plants will be of significant benefit to your generation?   Base: All respondents (n=938)

	Total	Gender		Age		Region						Ethnicity		Adult Life vs. Parents		
		Male	Female	18-27	28-39	BC	Alberta	MB/SK	Ontario	Quebec	Atlantic Canada	White	BIPoC	Harder	About the same	Easier
n=	938	499	439	317	621	100	83	68	360	280	47	591	339	625	128	141
(NET) Agree	32%	40%	25%	34%	31%	44%	25%	22%	34%	30%	32%	29%	38%	33%	27%	46%
Strongly agree	10%	13%	6%	12%	9%	10%	11%	5%	11%	9%	11%	9%	11%	9%	11%	11%
Somewhat agree	23%	26%	19%	22%	23%	34%	14%	17%	24%	21%	21%	20%	27%	23%	16%	35%
Neither agree or disagree	25%	24%	25%	26%	24%	20%	26%	35%	24%	24%	27%	24%	26%	22%	32%	32%
(NET) Disagree	28%	23%	32%	27%	28%	17%	37%	32%	28%	26%	27%	31%	22%	31%	29%	18%
Somewhat disagree	13%	12%	14%	17%	11%	7%	14%	15%	15%	13%	10%	14%	11%	13%	20%	11%
Strongly disagree	15%	11%	18%	10%	17%	10%	23%	17%	13%	13%	17%	17%	11%	18%	10%	7%
I don't know	15%	13%	18%	12%	17%	19%	12%	11%	14%	20%	15%	16%	14%	15%	11%	4%

Leger

Respondent Profile

Detailed Methodology

Weighted and Unweighted Sample

Gen Z and Millennial participants were randomly selected from LEO's online panel.

Leger owns and manages an Internet panel that includes more than 450,000 Canadians coast to coast. An online panel consists of Web users profiled according to different demographic variables. The majority of Leger's panel members (60%) were randomly recruited over the phone in the past ten years, which makes this panel very similar to the current Canadian population on a number of demographic characteristics. Moreover, 35% of panelists were recruited through affiliate programs and 5% through partner campaigns and programs.

To be eligible, respondents were required to be 18 - 39 years of age.

Detailed Methodology

Sampling Frame

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

Region	Unweighted	Weighted
British Columbia	100	126
Alberta	83	119
MB/SK	68	62
Ontario	360	376
Quebec	280	197
Atlantic Canada	47	58

GENDER	Unweighted	Weighted
Male	499	472
Female	439	466

AGE	Unweighted	Weighted
Between 18 and 28	317	338
Between 29 and 39	621	600

Leger

Our Services

- **Leger**
  Marketing research and polling

- **Customer Experience (CX)**
  Strategic and operational customer experience consulting services

- **Leger Analytics (LEA)**
  Data modelling and analysis

- **Leger Opinion (LEO)**
  Panel management

- **Leger Communities**
  Online community management

- **Leger Digital**
  Digital strategy and user experience

- **International Research**
  Worldwide Independent Network (WIN)

600
EMPLOYEES

185
CONSULTANTS

8
OFFICES

MONTREAL | QUEBEC CITY | TORONTO | WINNIPEG

EDMONTON | CALGARY | VANCOUVER | NEW YORK

Leger

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.