



GETTY IMAGES

**ABACUS DATA**

**POLITICS IN AN AGE OF DISRUPTION**

ECONOMY  
TECHNOLOGY  
GEOPOLITICS  
DEMOGRAPHY  
COMMUNICATIONS

# ECONOMY & TECHNOLOGY

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# A DIFFERENT ECONOMY

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# A DIFFERENT ECONOMY

2006

**ExxonMobil**



**GE**



**Microsoft**



**Citigroup**



**BP**



**Shell**



TODAY

**Apple**



**Google**



**Microsoft**



**Amazon**



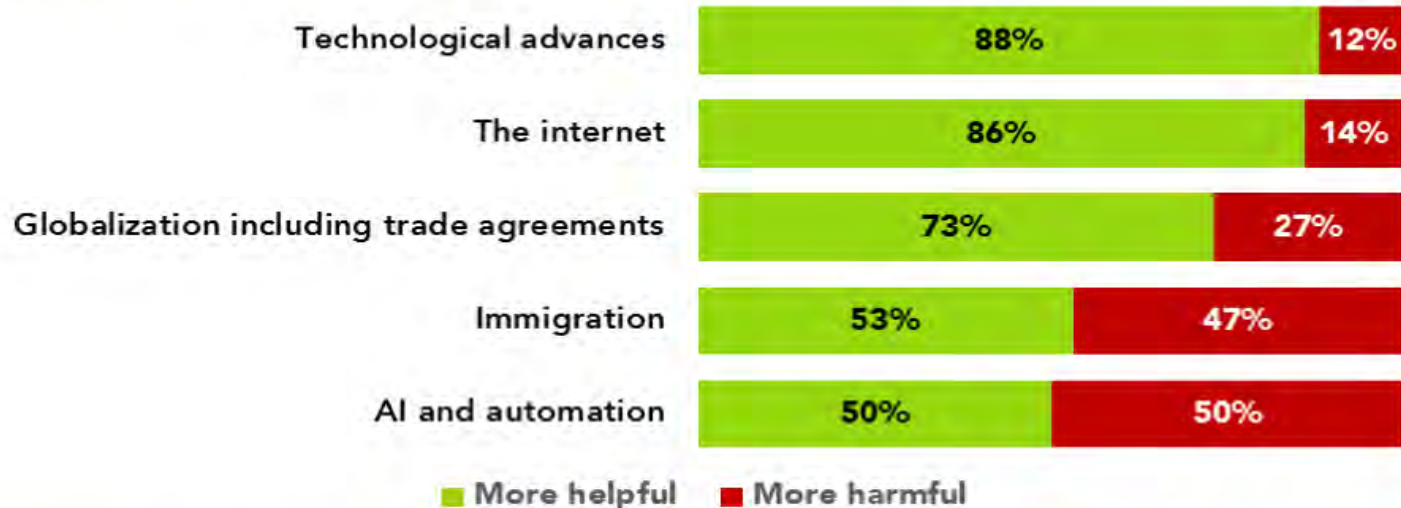
**Facebook**



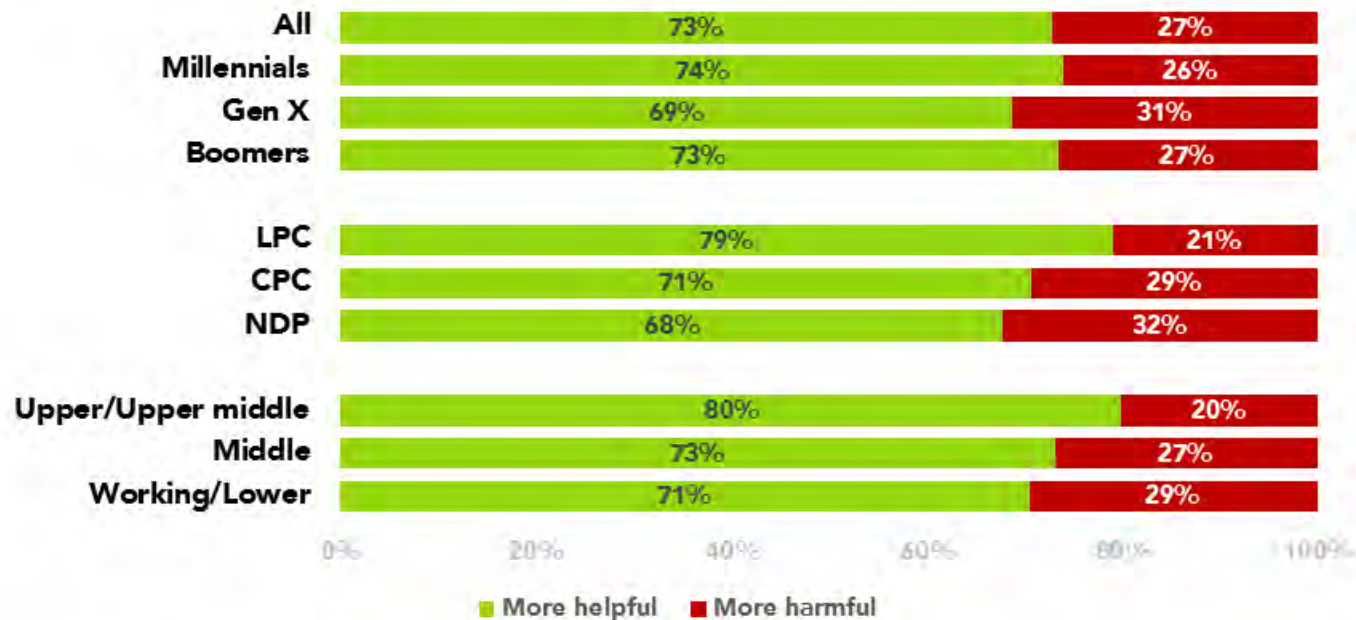
**Berkshire  
Hathaway**



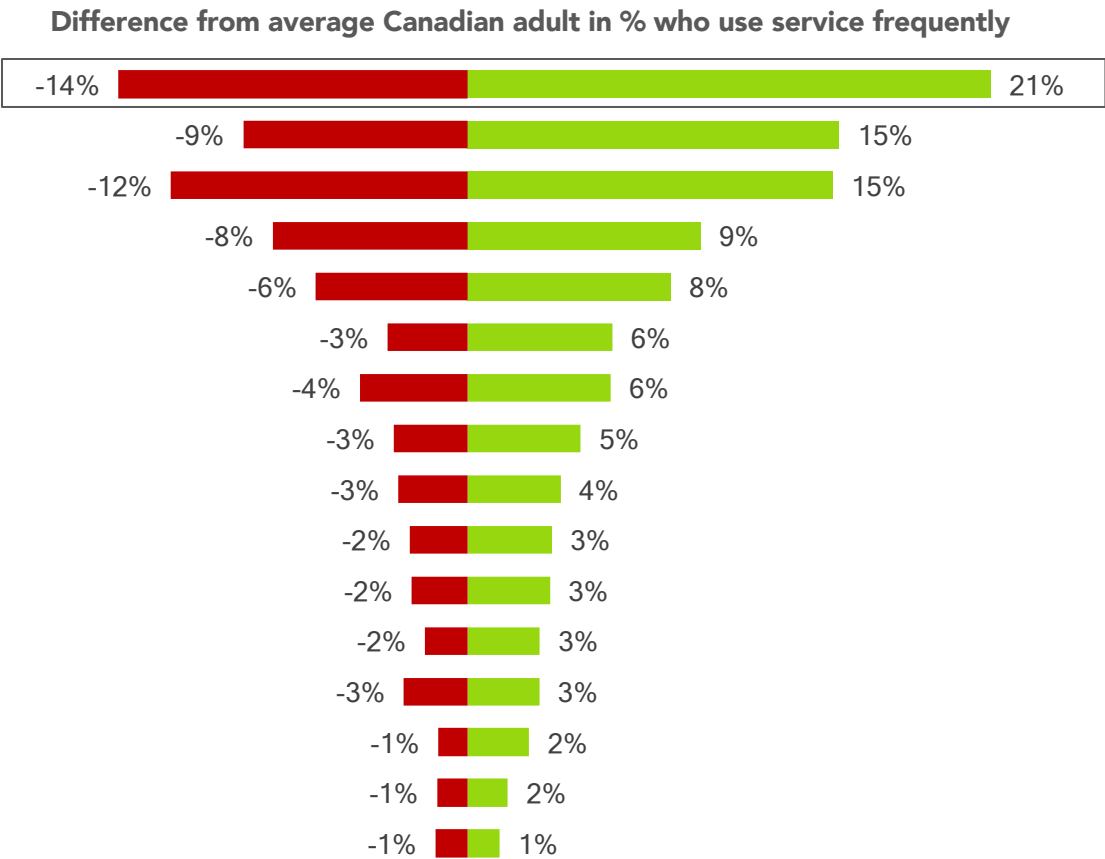
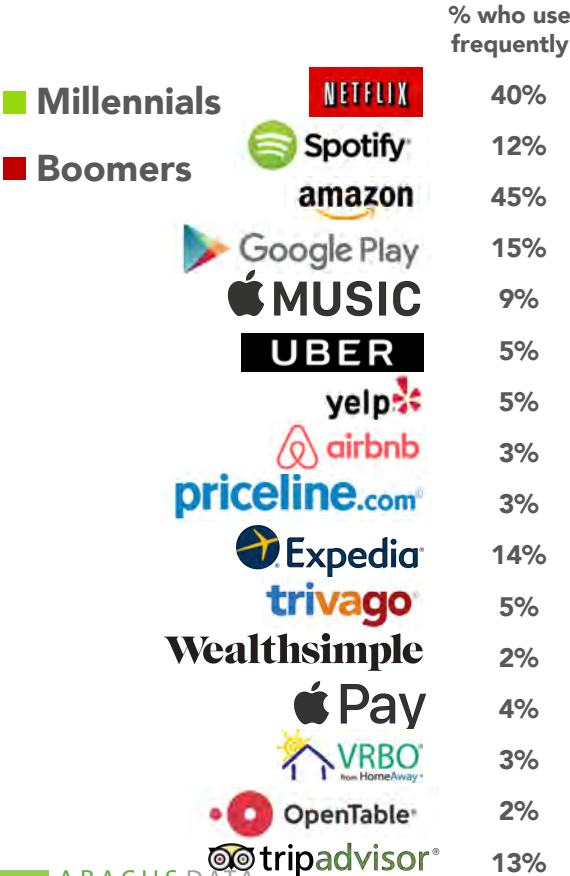
## WHAT HELPS OR HURTS CANADA'S FUTURE ECONOMIC PROSPECTS?



## HELPFUL/HARMFUL: GLOBALIZATION INCLUDING TRADE



# GENERATIONAL DISRUPTION





# GEO-POLITICS

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# IN 10 YEARS...

**EU  
BREAKS UP**

40%

**US PLAYS SMALLER  
ROLE  
IN WORLD**

42%

**CANADA PLAYS A  
BIGGER ROLE IN  
WORLD**

66%

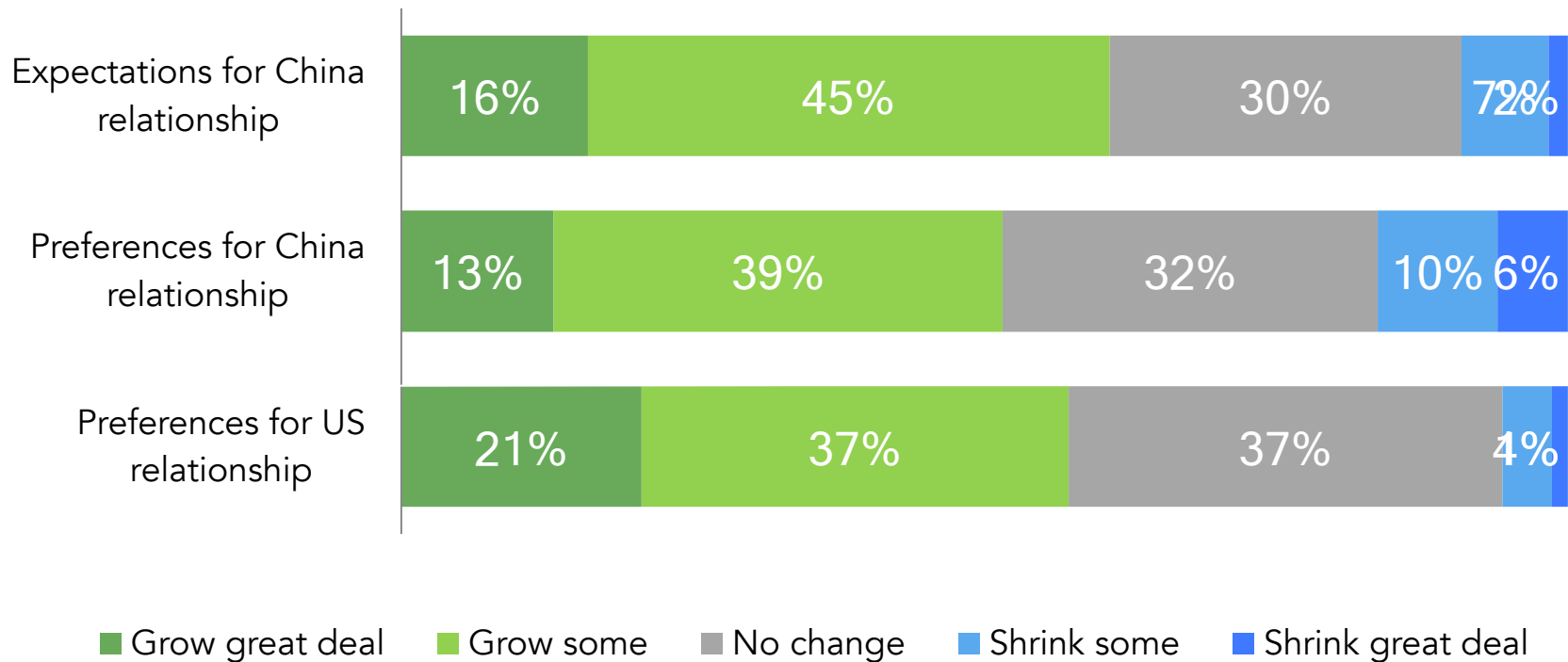
# CHINA VS. USA

Comparing China and the USA today, which country do you think is...

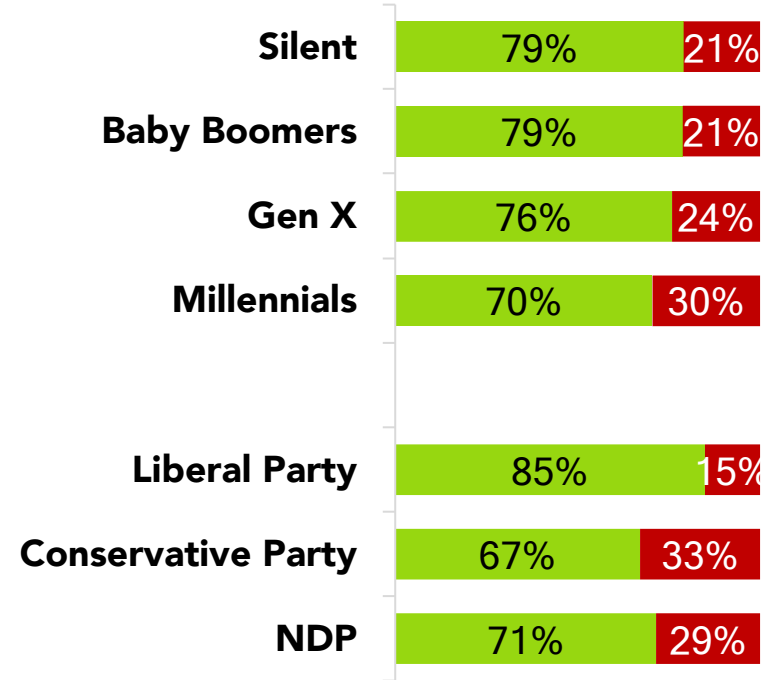
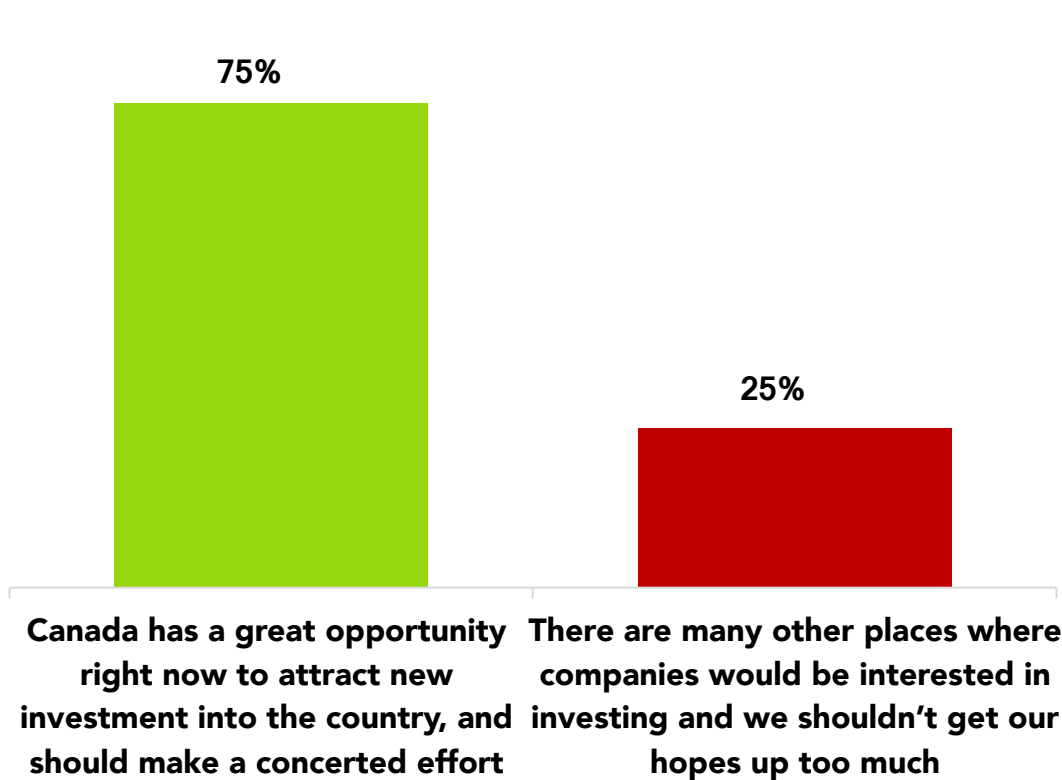


Doing more to try to maintain peace and avoid conflict	61%	39%
Showing a better example of what world leadership should look like	57%	43%
Doing more to grow the economy around the world	56%	44%
More stable and predictable	54%	46%
More respectful of other people in the world	53%	47%
Doing more to address climate change and environmental issues	43%	57%
Doing more for the poor in their country	39%	61%
More committed to freedom of speech	16%	84%

# ECONOMIC & TRADE RELATIONS

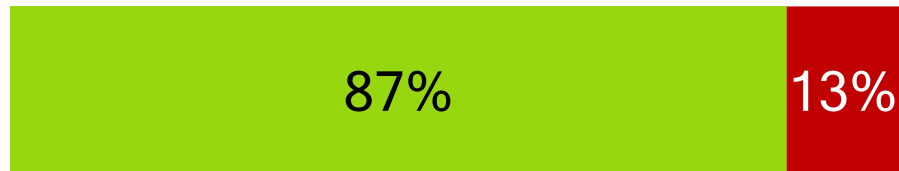


# WILL THE WORLD INVEST IN CANADA

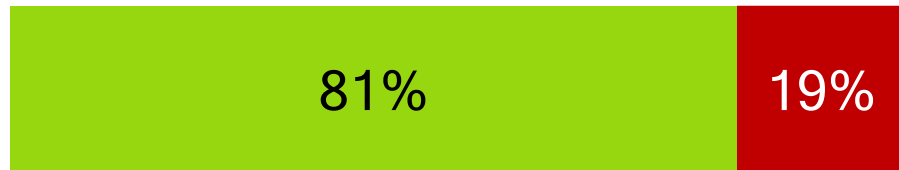


# CANADA SHOULD...

Try hard to attract more leading researchers from all over the world



Try hard to attract more investors from all over the world



Try hard to attract more hard workers from all over the world



 Agree  Disagree

# CANADA SHOULD...

Make a special effort to draw more international businesses to locate in Canada rather than the US

89%

11%

Work to attract a lot of tourists who don't know if they are welcome in America right now

73%

27%

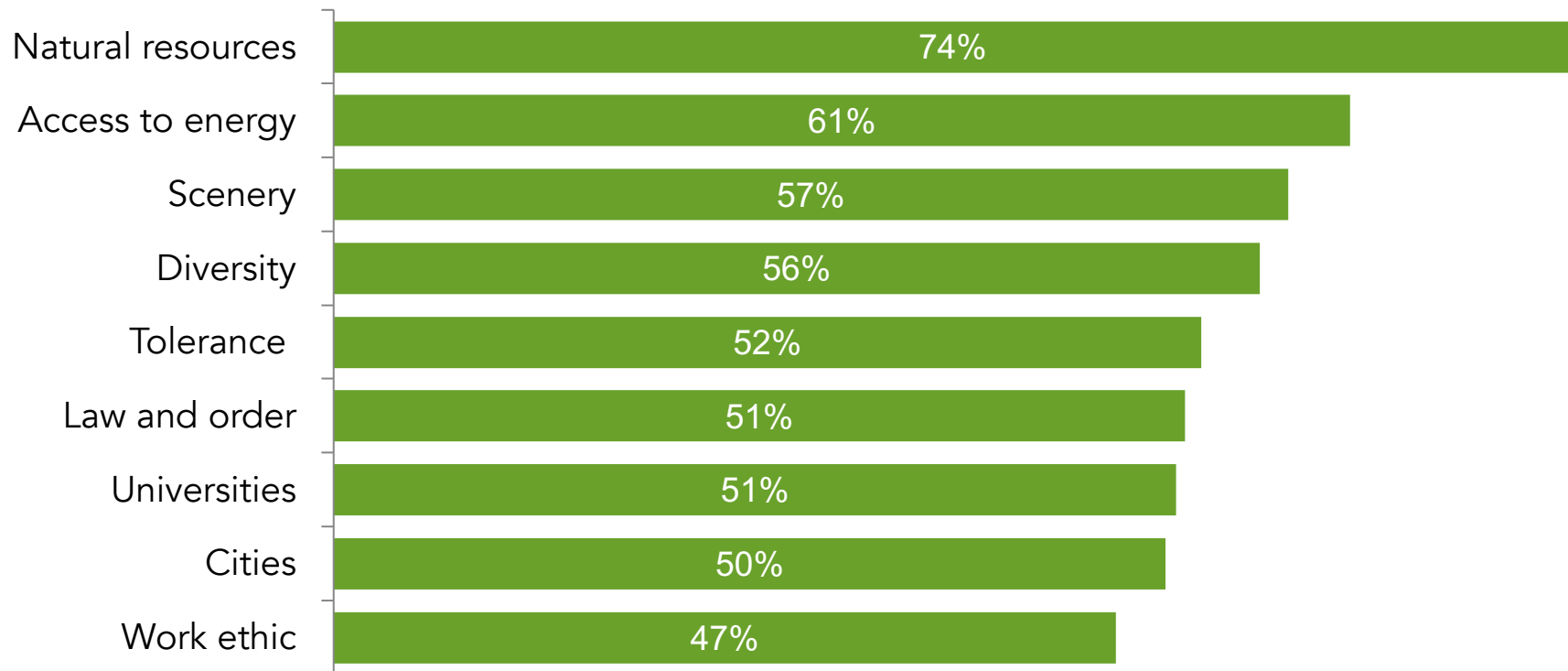
Work to attract a lot of talented workers who don't know if they are welcome in America right now

65%

35%

■ Agree ■ Disagree

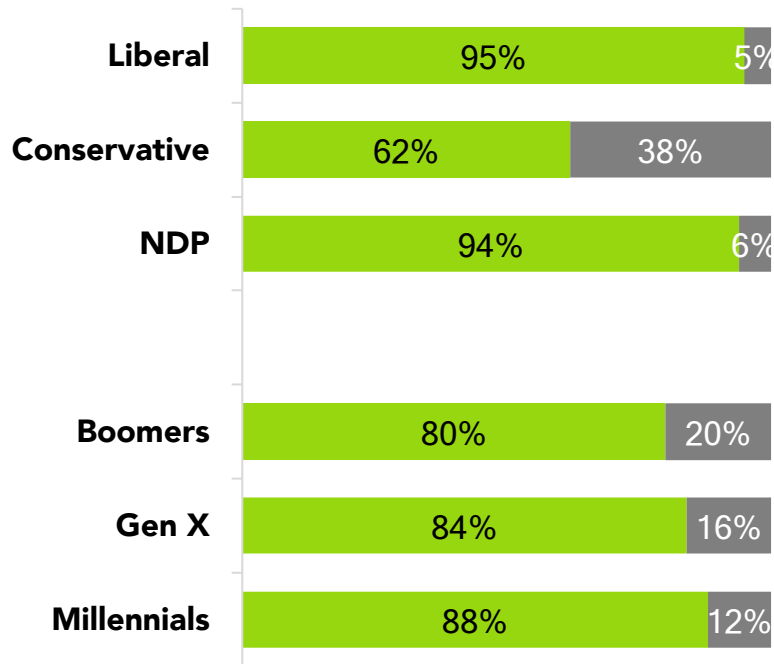
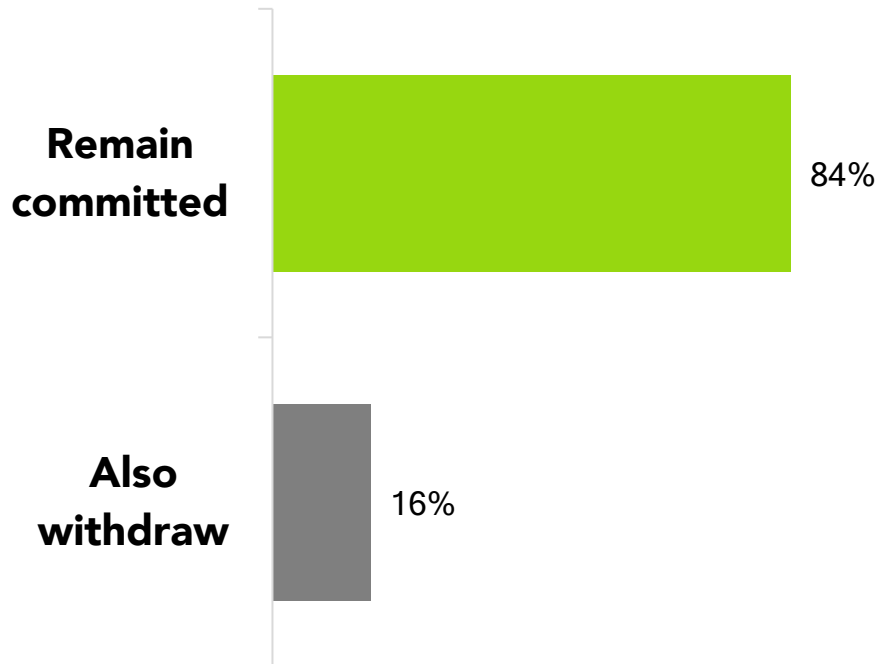
# CANADA'S TOP ADVANTAGES



■ Major strength

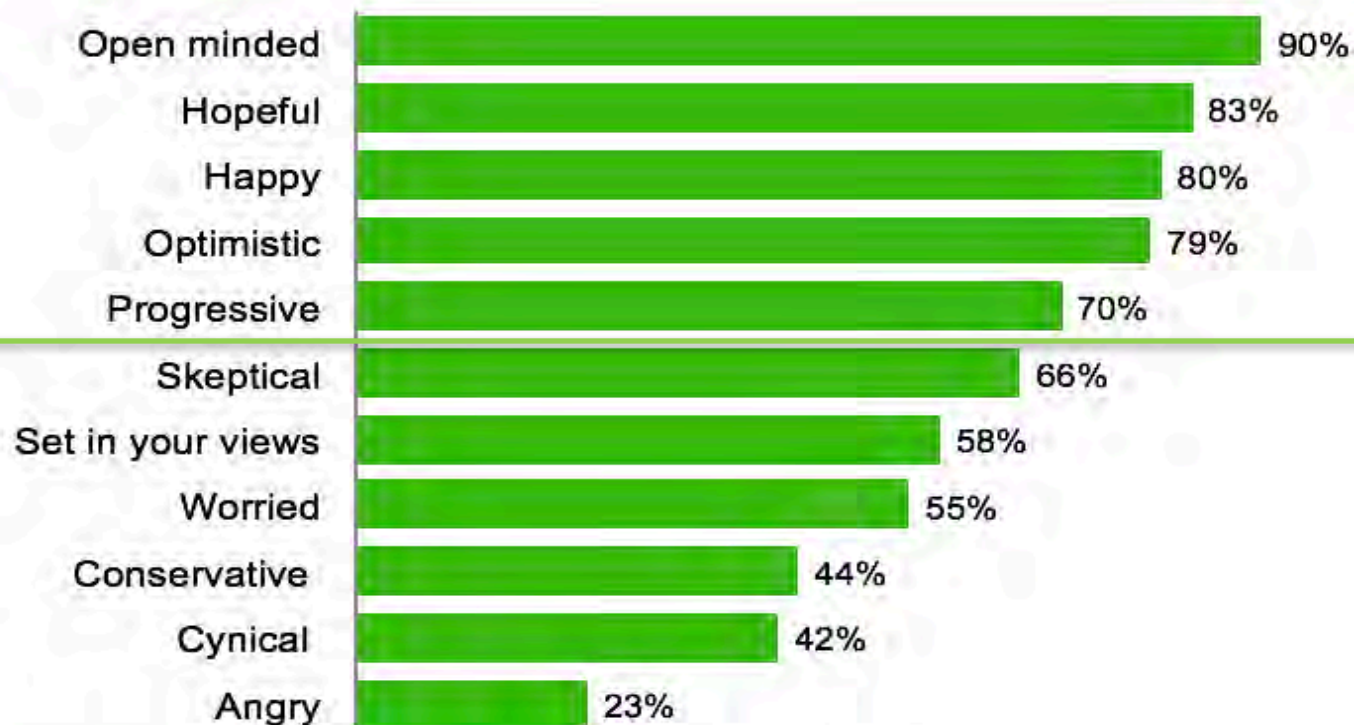


# CANADA AND THE PARIS ACCORD



Do you think Canada should remain committed to the Paris Accord or we should also withdraw from the Accord, given the decision of the US government?

## WHO WE ARE?



■ Describes you very well or somewhat

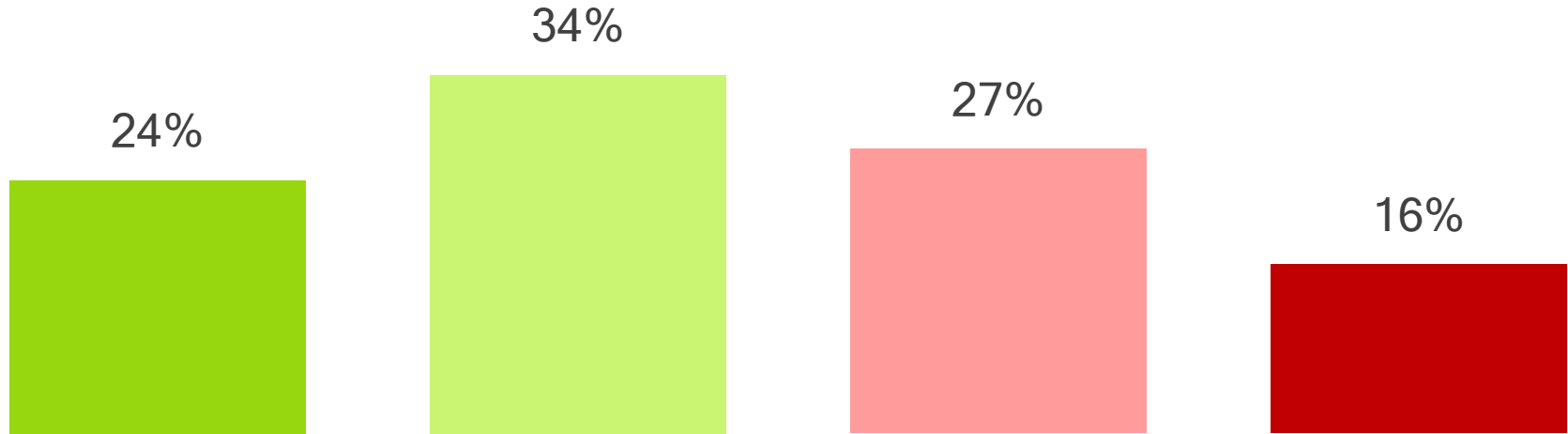
# GLOBALIST VS. NATIONALIST ATTITUDES

Ultra Globalists

Lean Globalist

Lean Nationalist

Ultra Nationalist

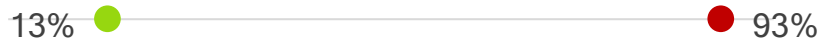


This is based on a statistically-based segmentation analysis using responses to 9 agree/disagree statements in our survey. The analysis naturally produce 2 unique segments based on responses.

# HOW THE GROUPS COMPARE

% AGREE

Canada should slow/stop immigration for the next several years.



There's too much diversity in Canada, we'd be better off with fewer different cultures.



The power of a few special interests prevents our country from making progress.



I feel like I no longer know what it means to be a Canadian.



Globalization has been bad for my own economic well-being.



Canada should try to be more like the United States.

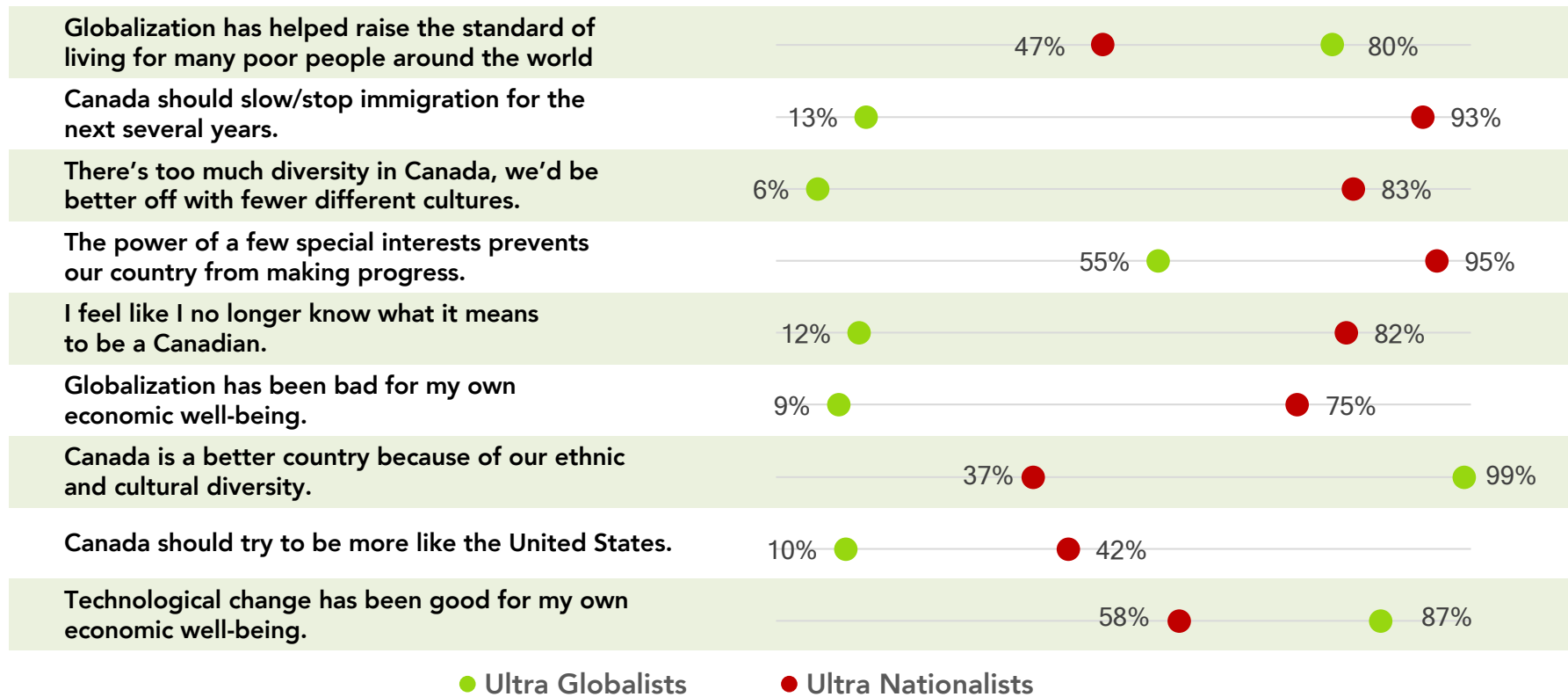


● Ultra Nationalist    ● Ultra Globalist

0%    20%    40%    60%    80%    100%

# HOW THE SEGMENTS COMPARE

% AGREE

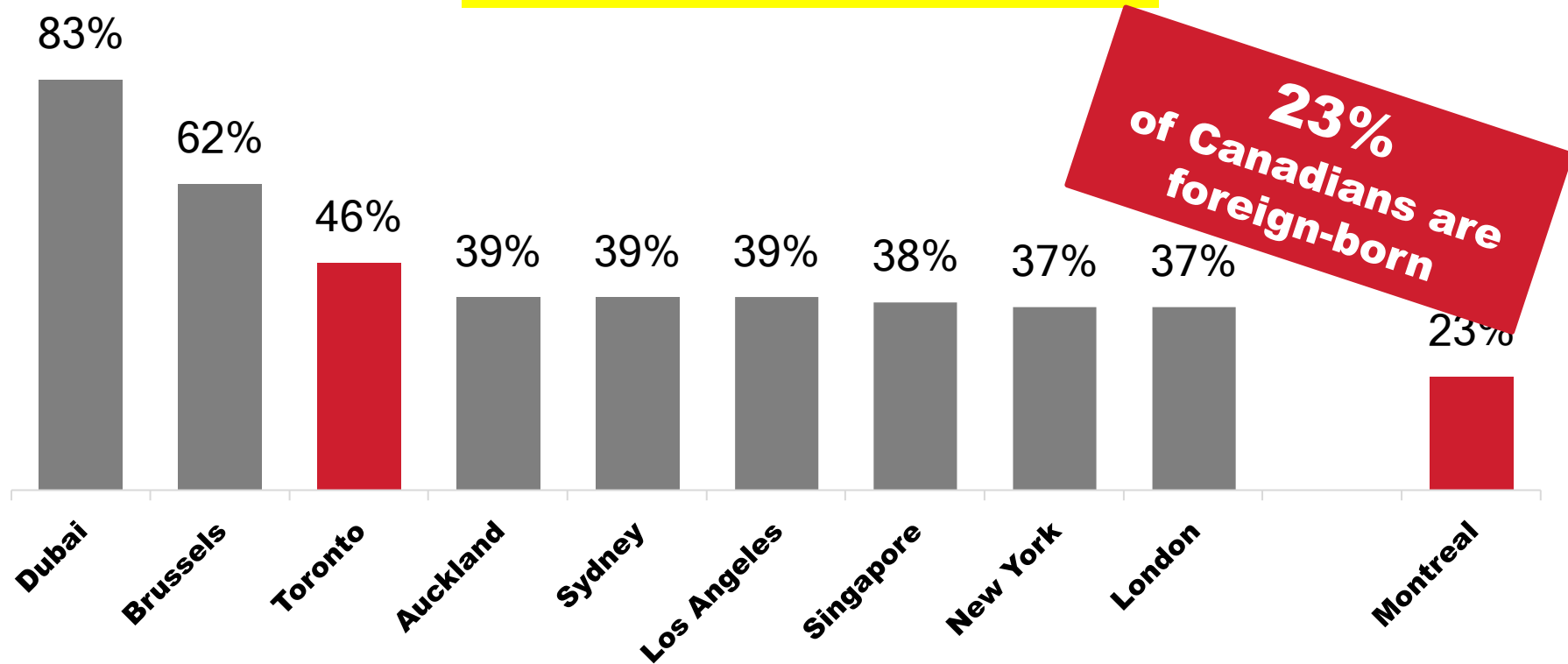


# A DIFFERENT COUNTRY

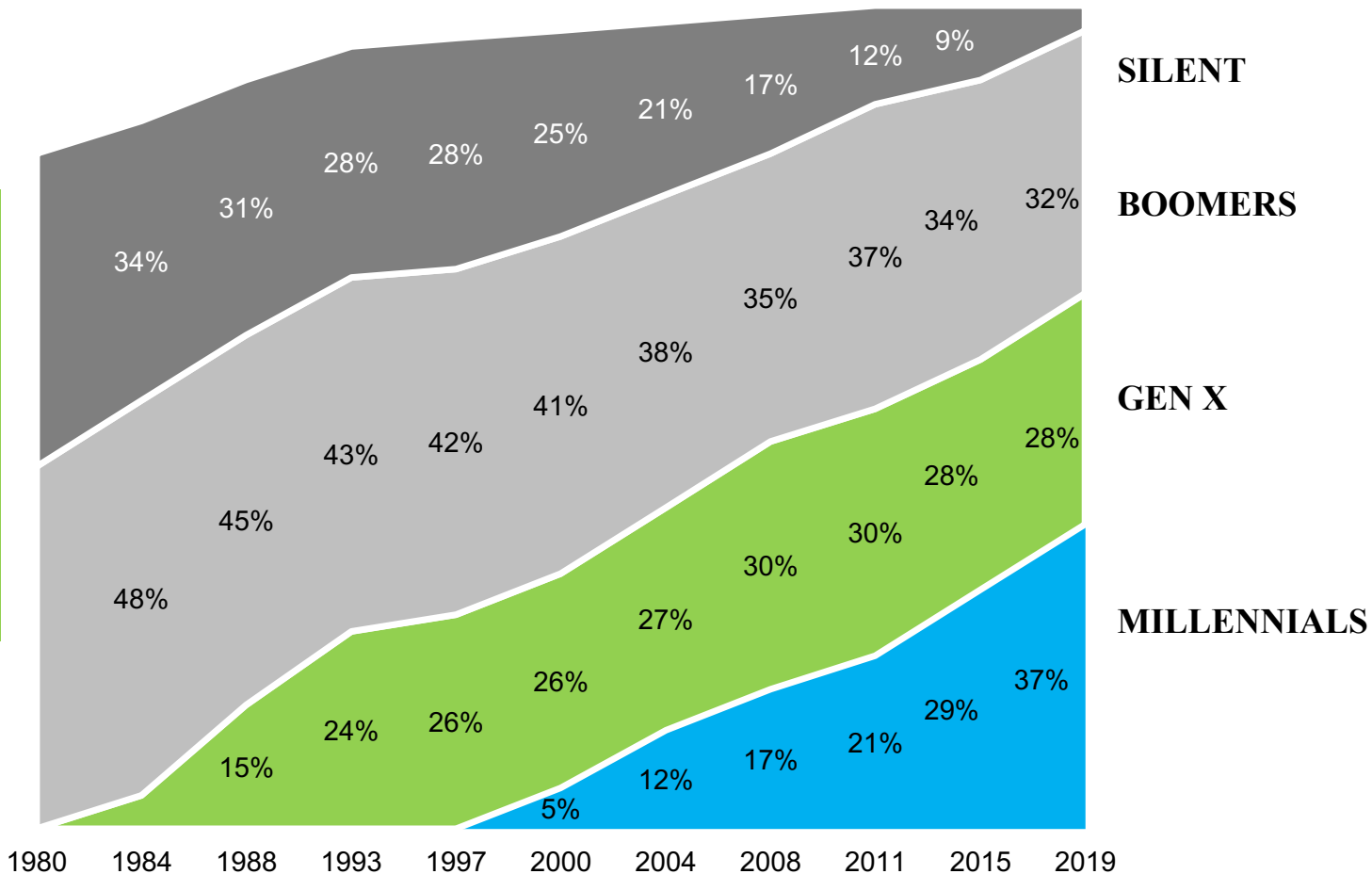
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# CITIES WITH HIGHEST % OF FOREIGN BORN RESIDENTS



## The Changing Electorate

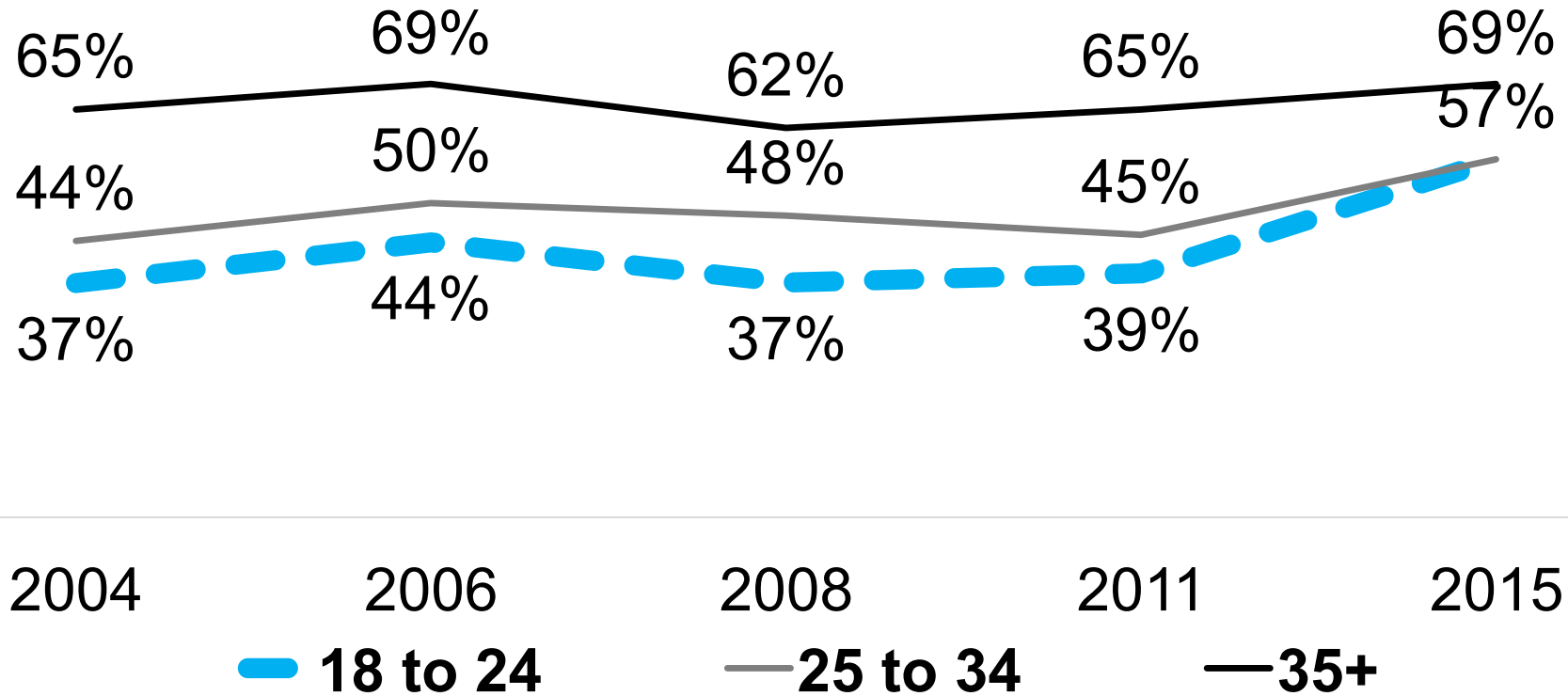




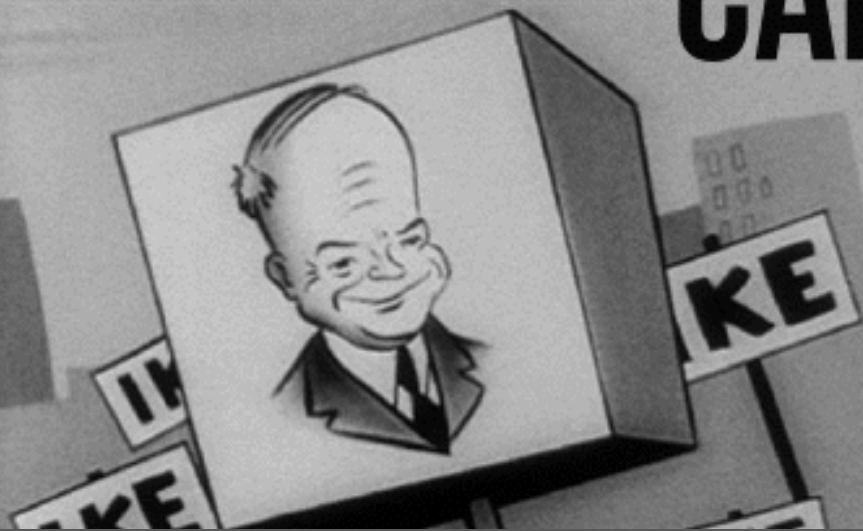
# ALTERNATIVE REALITIES

	LPC	CPC	NDP
WHAT HAPPENED	184	99	44
IF ONLY 45+ VOTED	154	129	44
IF ONLY UNDER 44 VOTED	222	46	56

# VOTER TURNOUT

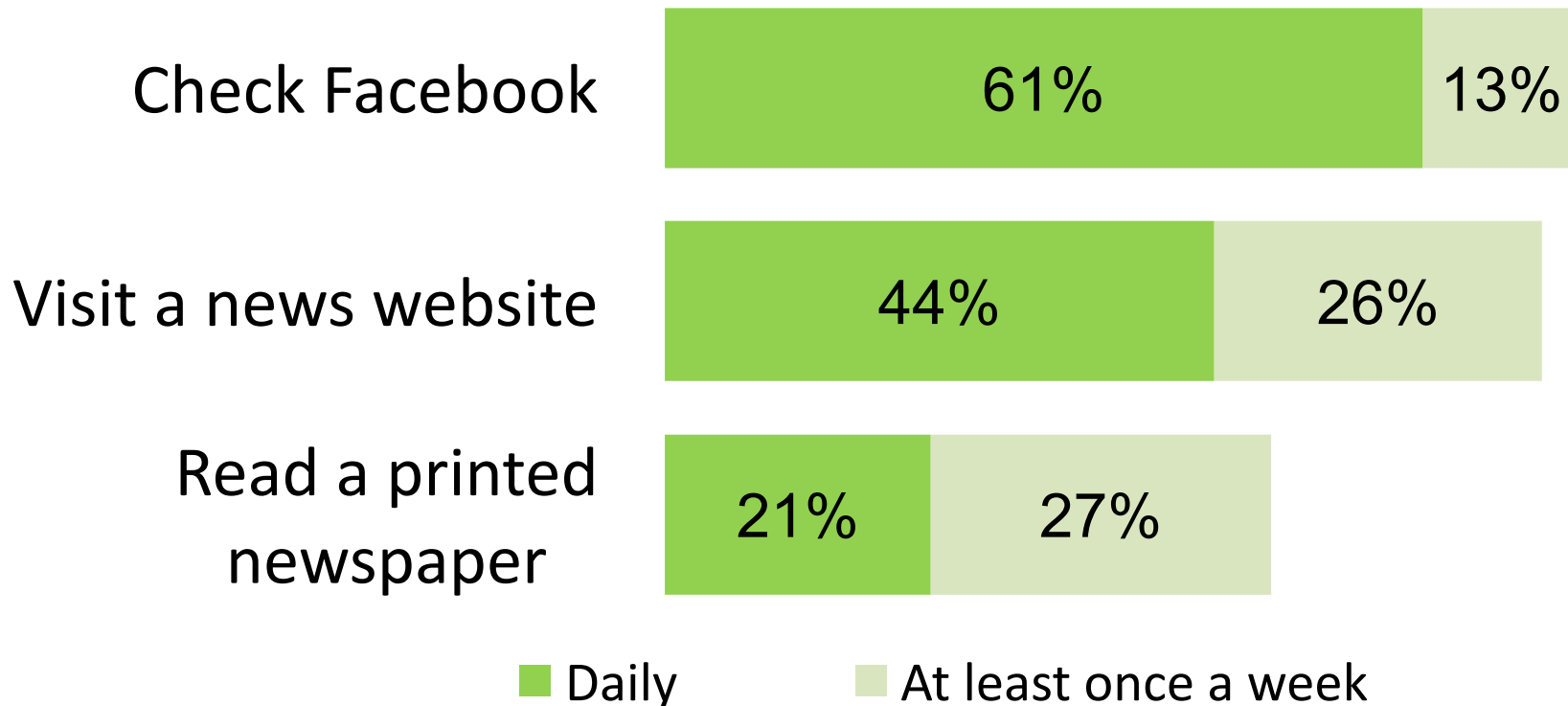


**WHO DOESN'T LIKE A GOOD  
CAMPAIGN AD?**





# REACHING THE MARKET



# **WATCH TV NEWS DAILY**

**18 - 29**

**30%**

**30 - 44**

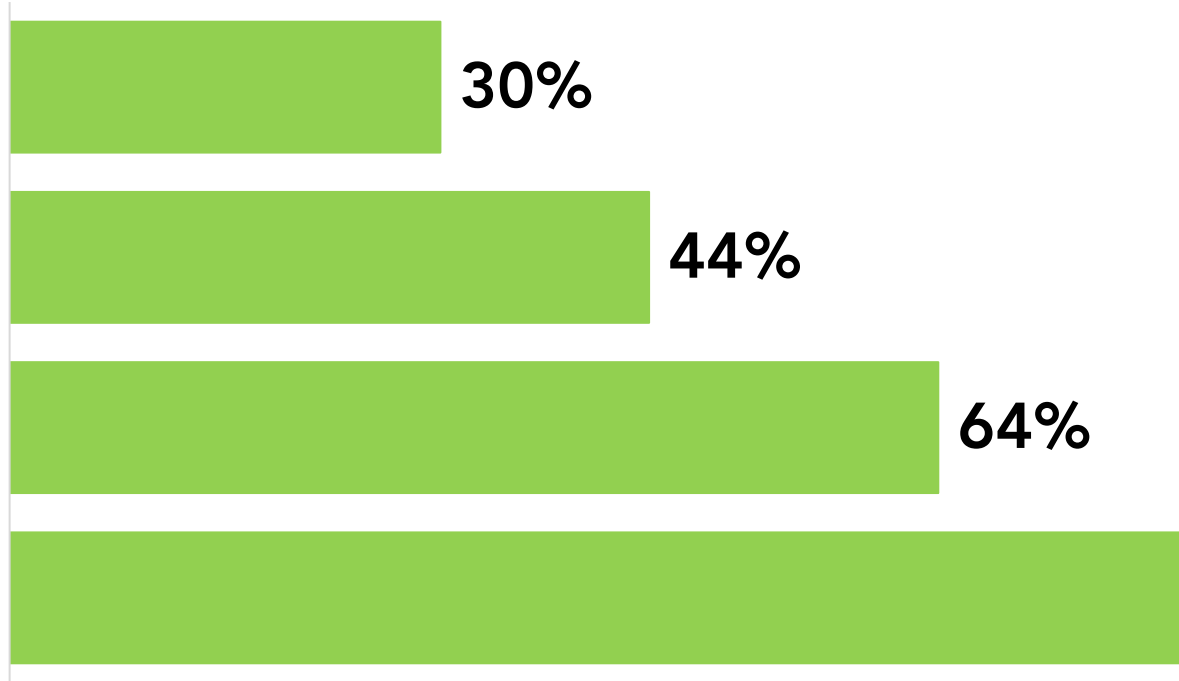
**44%**

**45 - 59**

**64%**

**60 +**

**82%**





## COST PER VOTE

\$5

\$10

## TV

\$74M

\$214M



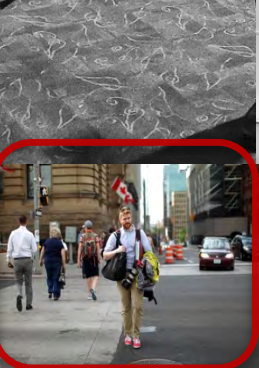
## DIFFERENT MEDIA















## CONCLUSIONS

DISRUPTION IS CONSTANT, GROWING AND REMARKABLY, COINCIDENT WITH RISING, NOT DECLINING CONFIDENCE

OUR ECONOMY IS TRANSFORMING, DEMOGRAPHY IS SHAPING OUR VALUES AND COMMUNICATIONS ARE TRANSFORMING ALL OF OUR TRANSACTIONS

POLITICS WILL FOLLOW, RATHER THAN LEAD DISRUPTION, WITH THE MOST SUCCESS GOING TO THOSE WHO SUPPORT RATHER THAN RESIST IT.



*What is Canadian?*

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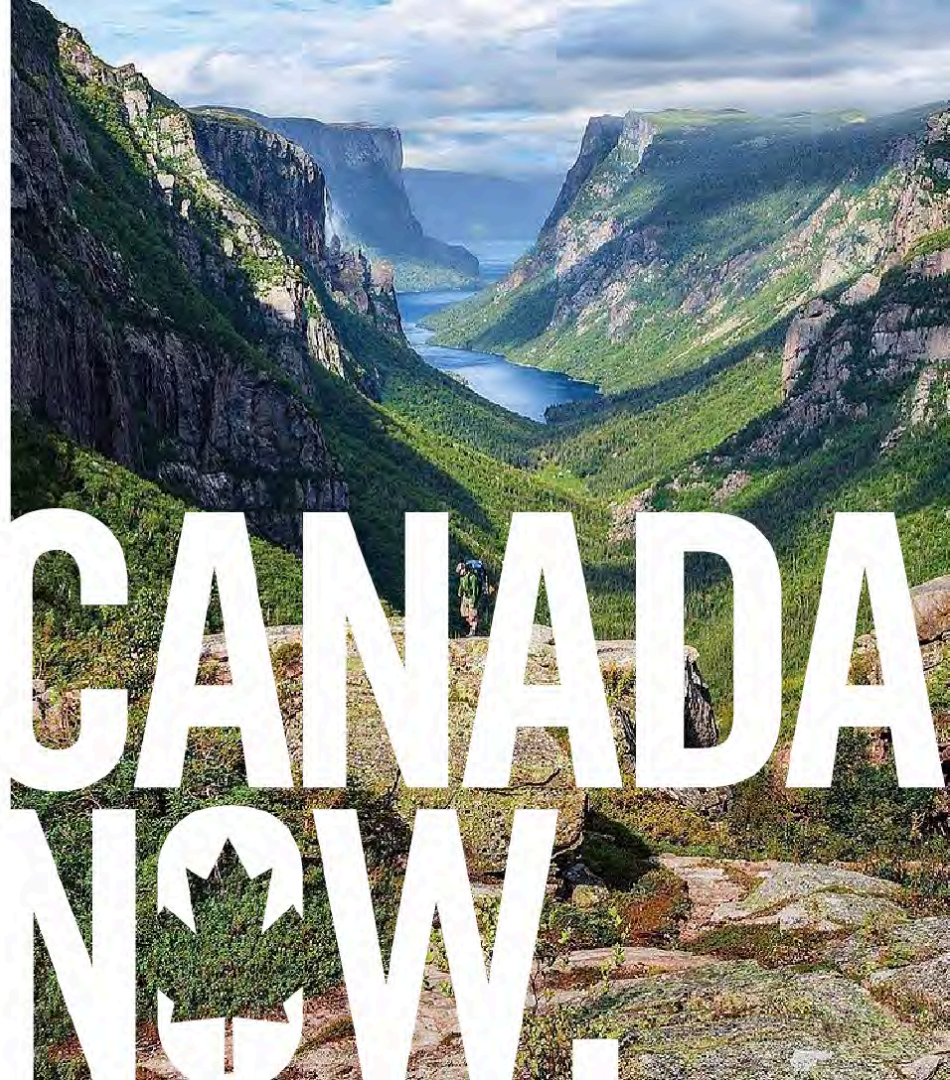
**STRENGTH AND STABILITY.  
FREEDOM TO BE YOURSELF.  
BRING YOUR IDEAS.  
LIVE WELL AND ENJOY NATURE.  
MAKE A GREEN SHIFT.  
INVENT TOMORROW.**

---

Unpredictability and stress are challenging businesses in many parts of the world today. Here in Canada, we're offering something different. Find out how your people and your company can flourish here.

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**INVEST NOW. INVEST FOR TOMORROW. INVEST IN *Canada*.**



**CANADA  
NOW.**





*Canada is*

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**STRONG,  
STABLE,  
SMART,  
SUSTAINABLE  
AND DIVERSE.**

---

Unpredictability and stress are challenging businesses in many parts of the world today. Here in Canada, we're offering something different. Find out how your people and your company can flourish here.

---

**INVEST NOW. INVEST FOR TOMORROW. INVEST IN *Canada.***







### WHY NOW?

**NOW IS OUT FRONT.  
NOW IS LOW RISK, HIGH RETURN.  
NOW IS PIONEERING.  
NOW MEANS GETTING A  
JUMP ON OTHERS.**

Challenging, uncertain conditions  
face businesses in many parts  
of the world today.

Here in Canada, we offer something  
different. Find out how your company  
can flourish here.

**INVEST NOW. INVEST FOR TOMORROW.  
INVEST IN *Canada.***



**BOOMING HUBS.  
TRADE PATHWAYS.  
SENSIBLE, STABLE REGULATIONS.  
GREAT MINDS  
AND HARD WORKERS.**

Challenging, uncertain conditions  
face businesses in many parts  
of the world today.

Here in Canada, we offer something  
different. Find out how your company  
can flourish here.

**INVEST NOW. INVEST FOR TOMORROW.  
INVEST IN *Canada.***

## EXPECTED DEMAND FOR OIL

