POLITICS IN AN AGE OF DISRUPTION
ECONOMY & TECHNOLOGY
A DIFFERENT ECONOMY
## A DIFFERENT ECONOMY

### 2006 vs TODAY

<table>
<thead>
<tr>
<th>Company</th>
<th>2006</th>
<th>TODAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>ExxonMobil</td>
<td>$362.5</td>
<td>$741.8</td>
</tr>
<tr>
<td>GE</td>
<td>$348.5</td>
<td>$663.1</td>
</tr>
<tr>
<td>Microsoft</td>
<td>$279.0</td>
<td>$520.4</td>
</tr>
<tr>
<td>Citigroup</td>
<td>$230.9</td>
<td>$472.1</td>
</tr>
<tr>
<td>BP</td>
<td>$225.9</td>
<td>$436.6</td>
</tr>
<tr>
<td>Shell</td>
<td>$203.5</td>
<td>$422.3</td>
</tr>
<tr>
<td>Apple</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Google</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amazon</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Facebook</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Berkshire Hathaway</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## WHAT HELPS OR HURTS CANADA'S FUTURE ECONOMIC PROSPECTS?

<table>
<thead>
<tr>
<th>Factor</th>
<th>More helpful</th>
<th>More harmful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technological advances</td>
<td>88%</td>
<td>12%</td>
</tr>
<tr>
<td>The internet</td>
<td>86%</td>
<td>14%</td>
</tr>
<tr>
<td>Globalization including trade agreements</td>
<td>73%</td>
<td>27%</td>
</tr>
<tr>
<td>Immigration</td>
<td>53%</td>
<td>47%</td>
</tr>
<tr>
<td>AI and automation</td>
<td>50%</td>
<td>50%</td>
</tr>
</tbody>
</table>

Thinking about the things that effect the prospects for the future of Canada's economy, do you tend to think each of the following are more helpful or more harmful to Canada's future economic prospects?
GENERATIONAL DISRUPTION

<table>
<thead>
<tr>
<th>Service</th>
<th>% who use frequently</th>
<th>Difference from average Canadian adult in % who use service frequently</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Netflix</td>
<td>40%</td>
<td>-14%</td>
</tr>
<tr>
<td>Spotify</td>
<td>12%</td>
<td>-9%</td>
</tr>
<tr>
<td>Amazon</td>
<td>45%</td>
<td>-12%</td>
</tr>
<tr>
<td>Google Play</td>
<td>15%</td>
<td>-8%</td>
</tr>
<tr>
<td>Apple Music</td>
<td>9%</td>
<td>-6%</td>
</tr>
<tr>
<td>Uber</td>
<td>5%</td>
<td>-3%</td>
</tr>
<tr>
<td>Yelp</td>
<td>5%</td>
<td>-4%</td>
</tr>
<tr>
<td>Priceline</td>
<td>3%</td>
<td>-3%</td>
</tr>
<tr>
<td>Expedia</td>
<td>3%</td>
<td>-3%</td>
</tr>
<tr>
<td>Trivago</td>
<td>14%</td>
<td>-3%</td>
</tr>
<tr>
<td>Wealthsimple</td>
<td>5%</td>
<td>-2%</td>
</tr>
<tr>
<td>Apple Pay</td>
<td>2%</td>
<td>-2%</td>
</tr>
<tr>
<td>Vrbo</td>
<td>4%</td>
<td>-3%</td>
</tr>
<tr>
<td>OpenTable</td>
<td>3%</td>
<td>-1%</td>
</tr>
<tr>
<td>TripAdvisor</td>
<td>2%</td>
<td>-1%</td>
</tr>
<tr>
<td>irement</td>
<td>13%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Boomers

% who use frequently

-14% 12% 45% 15% 9% 5% 14% 5% 2% 4% 3% 2% 13%
GEO-POLITICS
IN 10 YEARS...

EU BREAKS UP

US PLAYS SMALLER ROLE IN WORLD

66%

CANADA PLAYS A BIGGER ROLE IN WORLD

40% 42%
# CHINA VS. USA

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

<table>
<thead>
<tr>
<th>Area of Comparison</th>
<th>China Percentage</th>
<th>USA Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doing more to try to maintain peace and avoid conflict</td>
<td>61%</td>
<td>39%</td>
</tr>
<tr>
<td>Showing a better example of what world leadership should look like</td>
<td>57%</td>
<td>43%</td>
</tr>
<tr>
<td>Doing more to grow the economy around the world</td>
<td>56%</td>
<td>44%</td>
</tr>
<tr>
<td>More stable and predictable</td>
<td>54%</td>
<td>46%</td>
</tr>
<tr>
<td>More respectful of other people in the world</td>
<td>53%</td>
<td>47%</td>
</tr>
<tr>
<td>Doing more to address climate change and environmental issues</td>
<td>43%</td>
<td>57%</td>
</tr>
<tr>
<td>Doing more for the poor in their country</td>
<td>39%</td>
<td>61%</td>
</tr>
<tr>
<td>More committed to freedom of speech</td>
<td>16%</td>
<td>84%</td>
</tr>
</tbody>
</table>
ECONOMIC & TRADE RELATIONS

Expectations for China relationship
- Grow great deal: 16%
- Grow some: 45%
- No change: 30%
- Shrink some: 30%
- Shrink great deal: 7%

Preferences for China relationship
- Grow great deal: 13%
- Grow some: 39%
- No change: 32%
- Shrink some: 10%
- Shrink great deal: 6%

Preferences for US relationship
- Grow great deal: 21%
- Grow some: 37%
- No change: 37%
- Shrink some: 4%
- Shrink great deal: 4%
Canada has a great opportunity right now to attract new investment into the country, and should make a concerted effort. There are many other places where companies would be interested in investing and we shouldn’t get our hopes up too much.
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: 87%  
- Disagree: 13%

- Agree: 81%  
- Disagree: 19%

- Agree: 61%  
- Disagree: 39%
Canada should...

- Make a special effort to draw more international businesses to locate in Canada rather than the US: Agree 89%, Disagree 11%
- Work to attract a lot of tourists who don’t know if they are welcome in America right now: Agree 73%, Disagree 27%
- Work to attract a lot of talented workers who don’t know if they are welcome in America right now: Agree 65%, Disagree 35%
CANADA’S TOP ADVANTAGES

Natural resources: 74%
Access to energy: 61%
Scenery: 57%
Diversity: 56%
Tolerance: 52%
Law and order: 51%
Universities: 51%
Cities: 50%
Work ethic: 47%

Major strength
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?

- **Remain committed**: 84%
- **Also withdraw**: 16%

**Breakdown by Political Affiliation**
- **Liberal**: 95% (5% withdraw)
- **Conservative**: 62% (38% withdraw)
- **NDP**: 94% (6% withdraw)

**Breakdown by Generation**
- **Boomers**: 80% (20% withdraw)
- **Gen X**: 84% (16% withdraw)
- **Millennials**: 88% (12% withdraw)
WHO WE ARE?

- Open minded: 90%
- Hopeful: 83%
- Happy: 80%
- Optimistic: 79%
- Progressive: 70%
- Skeptical: 66%
- Set in your views: 58%
- Worried: 55%
- Conservative: 44%
- Cynical: 42%
- Angry: 23%

■ Describes you very well or somewhat
GLOBALIST VS. NATIONALIST ATTITUDES

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.
Canada should slow/stop immigration for the next several years. 13% Ultra Nationalist 93% Ultra Globalist

There’s too much diversity in Canada, we’d be better off with fewer different cultures. 6% Ultra Nationalist 83% Ultra Globalist

The power of a few special interests prevents our country from making progress. 55% Ultra Nationalist 95% Ultra Globalist

I feel like I no longer know what it means to be a Canadian. 12% Ultra Nationalist 82% Ultra Globalist

Globalization has been bad for my own economic well-being. 9% Ultra Nationalist 75% Ultra Globalist

Canada should try to be more like the United States. 10% Ultra Nationalist 42% Ultra Globalist

ABACUS DATA
## HOW THE SEGMENTS COMPARE

<table>
<thead>
<tr>
<th>Statement</th>
<th>% Agree</th>
<th>Ultra Globalists</th>
<th>Ultra Nationalists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Globalization has helped raise the standard of living for many poor people around the world</td>
<td>47%</td>
<td>80%</td>
<td>13%</td>
</tr>
<tr>
<td>Canada should slow/stop immigration for the next several years.</td>
<td>13%</td>
<td>93%</td>
<td>6%</td>
</tr>
<tr>
<td>There’s too much diversity in Canada, we’d be better off with fewer different cultures.</td>
<td>6%</td>
<td>83%</td>
<td>55%</td>
</tr>
<tr>
<td>The power of a few special interests prevents our country from making progress.</td>
<td>55%</td>
<td>95%</td>
<td>12%</td>
</tr>
<tr>
<td>I feel like I no longer know what it means to be a Canadian.</td>
<td>12%</td>
<td>82%</td>
<td>9%</td>
</tr>
<tr>
<td>Globalization has been bad for my own economic well-being.</td>
<td>9%</td>
<td>75%</td>
<td>37%</td>
</tr>
<tr>
<td>Canada is a better country because of our ethnic and cultural diversity.</td>
<td>37%</td>
<td>99%</td>
<td>10%</td>
</tr>
<tr>
<td>Canada should try to be more like the United States.</td>
<td>10%</td>
<td>42%</td>
<td>58%</td>
</tr>
<tr>
<td>Technological change has been good for my own economic well-being.</td>
<td>58%</td>
<td>87%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Ultra Globalists • Ultra Nationalists
A DIFFERENT COUNTRY
CITIES WITH HIGHEST % OF FOREIGN BORN RESIDENTS

- 83% Dubai
- 62% Brussels
- 46% Toronto
- 39% Auckland
- 39% Sydney
- 39% Los Angeles
- 38% Singapore
- 37% New York
- 37% London
- 23% Montreal

23% of Canadians are foreign-born.
The Changing Electorate

- **SILENT**
- **BOOMERS**
- **GEN X**
- **MILLENNIALS**

Year:
- 1980
- 1984
- 1988
- 1993
- 1997
- 2000
- 2004
- 2008
- 2011
- 2015
- 2019
## Alternative Realities

<table>
<thead>
<tr>
<th></th>
<th>LPC</th>
<th>CPC</th>
<th>NDP</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What Happened</strong></td>
<td>184</td>
<td>99</td>
<td>44</td>
</tr>
<tr>
<td><strong>If only 45+ voted</strong></td>
<td>154</td>
<td>129</td>
<td>44</td>
</tr>
<tr>
<td><strong>If only under 44 voted</strong></td>
<td>222</td>
<td>46</td>
<td>56</td>
</tr>
</tbody>
</table>
VOTER TURNOUT

<table>
<thead>
<tr>
<th>Year</th>
<th>18 to 24</th>
<th>25 to 34</th>
<th>35+</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
WHO DOESN’T LIKE A GOOD CAMPAIGN AD?
REACHING THE MARKET

Check Facebook: 61% Daily, 13% At least once a week

Visit a news website: 44% Daily, 26% At least once a week

Read a printed newspaper: 21% Daily, 27% At least once a week
DIFFERENT MEDIA

COST PER VOTE

<table>
<thead>
<tr>
<th></th>
<th>$5</th>
<th>$10</th>
</tr>
</thead>
</table>

TV

|   | $74M | $214M |

DIFFERENT MEDIA
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?

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.

INVEST NOW. INVEST FOR TOMORROW. INVEST IN Canada.
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 you and your company can flourish here.
WHY NOW?
NOW IS OUT FRONT.
NOW IS LOW RISK, HIGH RETURN.
NOW IS PIONEERING.
NOW MEANS GETTING A JUMP ON OTHERS.

Invest now. Invest for tomorrow.
Invest in Canada.

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

Invest now. Invest for tomorrow.
Invest in Canada.
EXPECTED DEMAND FOR OIL

Next 10 years
- Increase: 51%
- Stay about the same: 31%
- Decrease: 17%

Next 30 years
- Increase: 40%
- Stay about the same: 20%
- Decrease: 39%

Do you believe that over the next 10/30 years, demand for oil will...