March 23, 2015

Dear [Name]

Re: Your request for access to information under Part II of the Access to Information and Protection of Privacy Act [Our File #: PRE/1/2015]

On January 29, 2015, the Premier’s Office received your request for access to the following records/information:

“All public opinion polling information prepared for and/or provided to the premier’s office between December 1st, 2014 and January 26, 2015.”

On February 24, 2015, we advised you the time limit for responding to your request has been extended for an additional 30 days because a large number of records were required to be searched.

I am pleased to inform you that your request for access to these records has been granted. In particular, access is granted to the following records:

- CETA (Comprehensive Economic and Trade Agreement) poll conducted by the Newfoundland and Labrador Stats Agency; and
- NL Issues Survey conducted by MQO Research.

For your information we have also included a copy of the final results of the NL Issues Survey poll conducted by MQO research, as well as a copy of the results of the focus group discussions that occurred on February 5 and 9, 2015.

Please be advised that responsive records will be published following a 72 hour period after the response is sent electronically to you or five business days in the case where records are mailed to you. It is the goal to have the responsive records posted to the Office of Public Engagement’s website within one business day following the applicable period of time. Please note that requests for personal information will not be posted online.
If you have any further questions, please feel free to contact Veronica Hayden by telephone at (709) 729-3570 or by e-mail at vhayden@gov.nl.ca.

Sincerely,

[Signature]

Darrell Hynes
Deputy Chief of Staff
Enc.
CETA Poll
December 19, 2014

The NLSA is conducting a survey for the Government of Newfoundland and Labrador related to the current dispute between the province and the Government of Canada surrounding the CETA Trade Agreement. CETA is the Comprehensive and Economic Trade Agreement between Canada and the European Union which serves to open up more markets throughout the European Union for Canadian products.

As part of the CETA negotiations, the Government of Newfoundland and Labrador had an agreement with the Government of Canada to give up Minimum Processing Requirements (MPR’s) in the fishery in exchange for $280 million towards a $400 million fisheries fund. MPR’s are a provincial government policy which requires that a designated amount of the fish harvested in the province also be processed here.

The Government of Newfoundland and Labrador believes the agreement allowed for it to use the $280 million as compensation for job losses which would result from giving up MPR’s as well as to fund initiatives related to fisheries renewal. The Government of Canada believes it was agreed that it would only contribute the $280 million if it was used as compensation for job losses from giving up MPR’s and nothing further.

1. Have you seen, heard or read anything about this dispute in the media? (yes or no)

2. Are you aware that Premier Davis traveled to Ottawa to meet with Prime Minister Harper on December 12th to try and finalize the CETA deal? (yes or no)

3. Do you support the Premier’s approach to travelling to Ottawa personally to meet with the Prime Minister and try to finalize the deal? (yes or no)

4. Do you believe the provincial government should continue its stance that the fund negotiated by the federal and provincial governments has to include money for the renewal of the fishery? (yes or no)

5. If the Government of Canada does not agree to allow its $280 million contribution to the fisheries fund to be used towards compensation for the loss of MPR’s and the renewal of the fishery, do you agree with the Premier’s stance that:
   a) NL will have to reconsider its support for the CETA deal (yes or no)
   b) NL will have to reconsider giving up MPR’s (yes or no)
Question 1

Have you seen, heard or read anything about this dispute in the media?

<table>
<thead>
<tr>
<th>Response</th>
<th>Percent (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>61.9%</td>
</tr>
<tr>
<td>No</td>
<td>38.1%</td>
</tr>
<tr>
<td>Total</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Question 2

Are you aware that Premier Davis traveled to Ottawa to meet with Prime Minister Harper on December 12th to try and finalize the CETA deal?

<table>
<thead>
<tr>
<th>Response</th>
<th>Percent (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>69.9%</td>
</tr>
<tr>
<td>No</td>
<td>30.1%</td>
</tr>
<tr>
<td>Total</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Question 3

Do you support the Premier’s approach to travelling to Ottawa personally to meet with the Prime Minister to try to finalize the deal?

<table>
<thead>
<tr>
<th>Response</th>
<th>Percent (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>82.2%</td>
</tr>
<tr>
<td>No</td>
<td>7.9%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>9.9%</td>
</tr>
<tr>
<td>Total</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Question 4

Do you believe the provincial government should continue its stance that the fund negotiated by the federal and provincial governments has to include money for the renewal of the fishery?

<table>
<thead>
<tr>
<th>Response</th>
<th>Percent (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>87.4%</td>
</tr>
<tr>
<td>No</td>
<td>3.2%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>9.4%</td>
</tr>
<tr>
<td>Total</td>
<td>100.0%</td>
</tr>
</tbody>
</table>
Question 5

If the Government of Canada does not agree to allow its $280 million contribution to the fisheries fund to be used towards compensation for the loss of MPR’s and the renewal of the fishery, do you agree with the Premier’s stance that:

a) Newfoundland and Labrador will have to reconsider its support for the CETA deal

<table>
<thead>
<tr>
<th>Response</th>
<th>Percent (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>80.0%</td>
</tr>
<tr>
<td>No</td>
<td>5.2%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>14.8%</td>
</tr>
<tr>
<td>Total</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

b) Newfoundland and Labrador will have to reconsider giving up MPR’s

<table>
<thead>
<tr>
<th>Response</th>
<th>Percent (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>72.2%</td>
</tr>
<tr>
<td>No</td>
<td>11.1%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>16.6%</td>
</tr>
<tr>
<td>Total</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

*Notes

Source: Compiled by the Newfoundland & Labrador Statistics Agency based on information from the CETA Survey 2014 (data collected December 22, 2014 to January 3, 2015).

Results are accurate within ±4.9%, at the 95% confidence interval (19 times out of 20).
INTRODUCTION

Hello, my name is __________ from MQO Research, a professional research firm in Newfoundland and Labrador. Today we are conducting a survey about current topics of interest to Newfoundlanders and Labradorians.

INTERVIEWER NOTE: if the respondent asks how long the survey will take please say: The survey will take approximately 10 to 12 minutes to complete.

Is there someone between 18 and 34 years of age in your household?

IF YES: May I speak with them?

IF NOT AVAILABLE – ARRANGE CALLBACK.
IF NO ONE IN HOUSEHOLD BETWEEN 18-34 CONTINUE.

May I please speak with someone in your household who is 18 years of age or older? [REPEAT INTRODUCTION IF NECESSARY].

ONCE CORRECT PERSON IS ON THE LINE: Do you have a few minutes to complete the survey?

Yes.................................................................01 Thank & Continue
No.................................................................02

IF NO: Is there a more convenient time for me to call back? ARRANGE A CALLBACK OR THANK AND TERMINATE.

IF RESPONDENT AGREES TO CONTINUE, ADD: This call may be monitored for quality purposes.

If a respondent questions the validity of the survey, the call or our organization please state: MQO Research has been conducting research studies in Canada and abroad for 30 years. We are a Gold Seal Member of the Canadian Marketing Research and Intelligence Association (MRIA) which is responsible for regulating marketing research practices in Canada. MQO Research adheres very strictly to all guidelines of professionalism and privacy as outlined by the MRIA. This study is registered with the Association. If you would like to contact the MRIA to verify the legitimacy of this research study or our company please call 1-800-554-9996 toll free and reference survey Number: 20150115-9796.

If a respondent questions the confidentiality of the information that they are providing please state the following:

As a member of the Marketing Research and Intelligence Association (MRIA) we adhere to strict standards of privacy and confidentiality. Our data is presented in aggregate form. Information will never be released to our client or any other third party in a manner that could be used in an attempt to disclose your identity.

D1. Gender: BY OBSERVATION

Male .................................................................1
Female ............................................................2

D2. First, into which of the following broad categories does your age fall? READ CHOICES 1 - 6

18 – 24 .................................................................1
25 – 34 .................................................................2
35 – 44 .................................................................3
45 – 54 .................................................................4
55 – 64 .................................................................5
65 or older ...........................................................6
Prefer not to say ....................................................8
Section 1: Government Performance

The next few questions are about provincial issues.

Q1. In your opinion, what are the most important issues that the provincial government should be focused on today?

INTERVIEWER NOTE: RECORD VERBATIM.

Record Issue #1
Record Issue #2
Record Issue #3
- Refused (VOL) ................................................................. 998
- Don’t know (VOL) ............................................................ 999

Q2. How important are each of the following provincial issues to you? Please use a scale of 1 to 10 where 1 is 'not at all important' and 10 is 'extremely important'.

INTERVIEWER NOTE: REPEAT SCALE AS NECESSARY. READ AND ROTATE.

a. Keeping the development of Muskrat Falls on time and on budget
b. Preventing a repeat of last year’s widespread power outages
c. Diversifying the economy
d. Ensuring we have enough skilled labor to meet future demand
e. Building new schools to meet future education needs
f. Improving the quality of healthcare
g. Improved public safety
h. Providing greater support for low income families
i. Full day kindergarten
j. Reduction in the number of seats in the house of assembly

Q3. How would you rate the current provincial government’s handling of each of the following? Please use a scale of 1 to 10 where 1 is ‘poor’ and 10 is ‘excellent’.

INTERVIEWER NOTE: REPEAT SCALE AS NECESSARY. READ AND ROTATE.

a. Fiscal management in light of lower oil prices
b. The Muskrat Falls project
c. Review of Bill 29 – Also known as the province’s Access to Information Law
d. Increase of crime in Newfoundland and Labrador
e. The Canada-European Union trade deal with Ottawa (also referred to as CETA)

Q4a. One issue that has been talked about in the media for the past few days has been the possible reduction in the number of seats in the House of Assembly. Do you strongly support, support, oppose or strongly oppose reducing the number of seats in the House of Assembly?

Strongly support ................................................................. 5
Support ................................................................................. 4
Neither support nor oppose (VOL) .......................................... 3
Oppose ................................................................................. 2
Strongly oppose ................................................................. 1
Refused (VOL) ................................................................. 8
Don’t Know (VOL) ............................................................. 9

Q4b. The government has indicated that reducing the number of seats from 48 to 38 before the next election will save around 10 million dollars. To get these savings now, the government would have to act quickly. With this in mind, do you strongly agree, agree, disagree or strongly disagree with completing the review before the next election?

Strongly agree ........................................................................ 5
Agree ......................................................................................... 4
Neither agree nor disagree (VOL) ............................................ 3
Disagree .................................................................................... 2
Strongly disagree ................................................................. 1
Refused (VOL) ................................................................. 8
Don't Know (VOL) .......................................................... 9

Q4c. For those who strongly agreed/agreed with Q4b.2...If you heard in the media that this review could cause the election date to move, would you still agree with completing the review now?

Read: "Another issue that has surfaced in the past has been the possible privatizing of government services."

Q4b. On a scale of 1-10 with one meaning "not at all supportive" and a ten meaning "very supportive", how supportive would you be of the privatizing of government services?

Q5. Thinking about your current quality of life, what is the one issue or area that the provincial government should focus on to improve your quality of life in Newfoundland and Labrador?

INTERVIEWER NOTE: Record Verbatim.

Refused (VOL) ................................................................. 988
Don't know (VOL) .......................................................... 999

Q5a. As reported recently in the media, it is being projected that the provincial budget deficit may rise significantly this year. If the provincial government had to reduce spending to better manage the budget, which one of the following areas would be the most acceptable area to cut?

Infrastructure projects like new schools or hospitals
The size of the public service
Roadwork including new pavement, and water and sewer
Investment in economic development
Government programs and services

Refused (VOL) ................................................................. 8
Don't know (VOL) .......................................................... 9

Q6b. Which area would be the second most acceptable area to cut?

Q6c. Which area would be the third most acceptable area to cut?

Q7. Would you expect your government to make tough decisions even if it may impact or cut some government services?

Yes ................................................................. 01
No ................................................................. 02

Q8. Imagine for a moment that it is the morning after the next provincial budget and you are reacting to news headlines. How would you respond to each of the following headlines? Please use a scale of 1 to 10 where 1 is 'very unacceptable' and 10 is 'very acceptable'.

INTERVIEWER NOTE: REPEAT SCALE AS NECESSARY. READ AND ROTATE.

a. Government increases taxes
b. Government cuts spending to control the deficit
c. Major infrastructure projects are shelved
d. Government maintains spending to keep the economy strong

Section 2: Leadership

Q9a. The next question is about Premier Paul Davis. How would you rate his performance as Premier of Newfoundland and Labrador so far? Please use a scale of 1 to 10 where 1 is 'poor' and 10 is 'excellent'.

Refused (VOL) ................................................................. 988
Don't know (VOL) .......................................................... 999

Q9b. Ask if a rating of 6 or lower is provided to Q9a: And why did you provide a rating of <recall rating from Q9a>?

INTERVIEWER NOTE: Record Verbatim.
Refused (VOL) ........................................................................................................998
Don’t know (VOL) ..................................................................................................999

Demographics

We now have a few final questions about you and your household that will help us analyze the survey results. As with all the answers you have provided, your responses will be kept strictly confidential.

D3. Which of the following social networking sites do you use on a regular basis?

INTERVIEWER NOTE: READ RESPONSES 1 THRU 5.

   a. Twitter
   b. Facebook
   c. YouTube
   d. LinkedIn
   e. Blogs

Yes .........................................................................................................................1
Don’t know (VOL) ..................................................................................................2
Refused (VOL) .....................................................................................................8
Don’t know (VOL) .................................................................................................9

D4. In a typical week, approximately how many hours in total do you spend on the internet for personal use?

Record total number of whole hours ______

Refused (VOL) .....................................................................................................098
Don’t know (VOL) .................................................................................................099

D5. And which of the following categories best corresponds to your annual household income before taxes and deductions?

   Less than $40,000 ..............................................................................................1
   $40,000 to $69,999 ..........................................................................................2
   $70,000 to $99,999 .........................................................................................3
   $100,000 to $149,999 .....................................................................................4
   $150,000 or more ...........................................................................................5
   Prefer not to say ..............................................................................................8

That's the end of the survey. Thanks very much for your time and cooperation.

NOTE: Area of residence for respondents is identified by telephone number
In your opinion, what are the most important issues that the provincial government should be focused on today?

<table>
<thead>
<tr>
<th>Total</th>
<th>Region</th>
<th>Gender</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>St John's CMA</td>
<td>Other Eastern</td>
<td>Central</td>
</tr>
<tr>
<td>Health</td>
<td>52%</td>
<td>49%</td>
<td>55%</td>
</tr>
<tr>
<td>Health Care</td>
<td>43%</td>
<td>45%</td>
<td>44%</td>
</tr>
<tr>
<td>Wait times for health care (General)</td>
<td>3%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Increase healthcare staff</td>
<td>3%</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>Health care for mental heath issues / special needs</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Wait times in emergency</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>More/better long term care facilities</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Wait times for specialists</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Health care issues in rural areas</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Education</td>
<td>25%</td>
<td>29%</td>
<td>22%</td>
</tr>
<tr>
<td>Education</td>
<td>22%</td>
<td>25%</td>
<td>21%</td>
</tr>
<tr>
<td>Cost of education/Financial assistance for post secondary</td>
<td>2%</td>
<td>3%</td>
<td>0%</td>
</tr>
<tr>
<td>All day kindergarten</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Classroom size</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Number of teachers/staff/special needs staff</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>----</td>
<td>----</td>
<td>----</td>
</tr>
<tr>
<td><strong>Economy</strong></td>
<td>17%</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>Economy</td>
<td>15%</td>
<td>19%</td>
<td>18%</td>
</tr>
<tr>
<td>Rural Newfoundland</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Employment/Jobs</strong></td>
<td>19%</td>
<td>13%</td>
<td>19%</td>
</tr>
<tr>
<td>Employment/Jobs</td>
<td>12%</td>
<td>9%</td>
<td>7%</td>
</tr>
<tr>
<td>More employment opportunities/Job creation</td>
<td>4%</td>
<td>1%</td>
<td>7%</td>
</tr>
<tr>
<td>Wages</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Retention/population</td>
<td>1%</td>
<td>0%</td>
<td>2%</td>
</tr>
<tr>
<td>Minimum Wage</td>
<td>1%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Cost of living</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
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<tr>
<td>Wage control</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Transportation/Roads</strong></td>
<td>12%</td>
<td>6%</td>
<td>14%</td>
</tr>
<tr>
<td>Transportation/Roads/Highways (Repair/maintenance)</td>
<td>9%</td>
<td>4%</td>
<td>10%</td>
</tr>
<tr>
<td>Transportation/Roads (snow clearing)</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Moose control (road safety)</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Fiscal Management</td>
<td>26%</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>Finances</td>
<td>7%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Deficit</td>
<td>6%</td>
<td>8%</td>
<td>3%</td>
</tr>
<tr>
<td>Budget</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Oil/gas prices</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Oil</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Taxes</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Balancing the budget</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Cuts in oil industry</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Muskrat falls/power supply</th>
<th>6%</th>
<th>8%</th>
<th>8%</th>
<th>4%</th>
<th>3%</th>
<th>11%</th>
<th>9%</th>
<th>4%</th>
<th>7%</th>
<th>6%</th>
<th>6%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Muskrat Falls positive mentions</td>
<td>2%</td>
<td>4%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
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<tr>
<td>(and general mentions)</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
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<tr>
<td>Muskrat Falls negative mentions</td>
<td>2%</td>
<td>2%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>8%</td>
<td>2%</td>
<td>1%</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>NL Power/Generator/Power</td>
<td>1%</td>
<td>1%</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>0%</td>
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<td>outages</td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Energy / electricity</td>
<td>1%</td>
<td>0%</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Hydro</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
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<td>0%</td>
<td>1%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Low income</th>
<th>11%</th>
<th>16%</th>
<th>10%</th>
<th>9%</th>
<th>3%</th>
<th>9%</th>
<th>5%</th>
<th>15%</th>
<th>19%</th>
<th>11%</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Affordable Housing</td>
<td>3%</td>
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<td>1%</td>
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<td>3%</td>
<td>4%</td>
<td>7%</td>
<td>3%</td>
<td>2%</td>
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<tr>
<td>Affordable Childcare</td>
<td>3%</td>
<td>4%</td>
<td>2%</td>
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<td>0%</td>
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<td>1%</td>
<td>4%</td>
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<td>Childcare</td>
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<td>7%</td>
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<tr>
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<td>4%</td>
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<tr>
<td>DK/NA</td>
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<td>21%</td>
<td>19%</td>
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<td>10%</td>
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<tr>
<td>Don't know (VOL)</td>
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</tr>
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<td>ISSUE #1 (Please Specify)</td>
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<tr>
<td>ISSUE #2 (Please Specify)</td>
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<td>5%</td>
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<td>5%</td>
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<td>5%</td>
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<tr>
<td>ISSUE #3 (Please Specify)</td>
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<td>7%</td>
<td>1%</td>
<td>4%</td>
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<td>0%</td>
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<tr>
<td>Refused (VOL)</td>
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</tbody>
</table>

Percentages may exceed 100% due to multiple response
NL Issues Study
Research Insights

Introduction
Study Methodology

- The following report has been prepared to determine the voting public's assessment of the most important issues facing the residents of Newfoundland and Labrador, and to gain feedback on their current provincial government's performance on various key issues of the day.
- A sample size of 600 was collected for this project across Newfoundland and Labrador which provides a margin of error of ±4.0%, 19 times out of 20.
- Interviewing was conducted between Friday, January 16th and Thursday, January 22nd, 2015.
- Results are weighted by region, age and gender to ensure they are representative of the population.
- This report provides a detailed summary of the results and key findings. It is important to note that throughout this report, mean scores (out of 10) are provided for trending purposes only.

Who Did We Speak With?

The demographic profile of survey respondents is presented in the following table.

<table>
<thead>
<tr>
<th>Demographics</th>
<th>Percentage*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td></td>
</tr>
<tr>
<td>18-34 years</td>
<td>10%</td>
</tr>
<tr>
<td>35-54 years</td>
<td>45%</td>
</tr>
<tr>
<td>55+ years</td>
<td>45%</td>
</tr>
<tr>
<td>Gender</td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>47%</td>
</tr>
<tr>
<td>Female</td>
<td>53%</td>
</tr>
<tr>
<td>Region</td>
<td></td>
</tr>
<tr>
<td>St. John's, CN</td>
<td>35%</td>
</tr>
<tr>
<td>Other Eastern</td>
<td>22%</td>
</tr>
<tr>
<td>Central</td>
<td>19%</td>
</tr>
<tr>
<td>Other Western</td>
<td>18%</td>
</tr>
<tr>
<td>Labrador</td>
<td>5%</td>
</tr>
<tr>
<td>Use of social networking sites (those who said 'yes')</td>
<td></td>
</tr>
<tr>
<td>Facebook</td>
<td>70%</td>
</tr>
<tr>
<td>Youtube</td>
<td>52%</td>
</tr>
<tr>
<td>Twitter</td>
<td>17%</td>
</tr>
<tr>
<td>LinkedIn</td>
<td>17%</td>
</tr>
<tr>
<td>Blogs</td>
<td>8%</td>
</tr>
</tbody>
</table>

*NOTE: Ages, gender and regional results detailed in the table are unweighted.
PART 1: PROVINCIAL ISSUES

Provincial Issues: Unaided
- The first step on the issues front was to find out what issues are on the minds of people across the province (and which issues they feel their government should be focused on).
- This question was open-ended; no options were provided.
- Respondents were probed for up to 3 issues.

Question
"In your opinion, what are the most important issues that the provincial government should be focused on today?"
"In your opinion, what are the most important issues that the provincial government should be focused on today?"

- **Healthcare**
- **Education**
- **Budget**
- **Employment/Jobs**
- **Seniors**
- **Transportation/Roads**
- **Low-income-families**
- **Economy**

**Inside the Numbers**

- When asked, 91% of residents could offer at least one issue that they feel their government should be focused on.
- By comparison, 94% of residents 35+ could think of one or more issues, while only 80% of those 18-34 could think of at least one specific issue.
- 73% could respond with a second issue that they feel is important.
- Only 43% could respond (when probed) with a third issue.
In your opinion, what are the most important issues that the provincial government should be focused on today?

% of Population Thinking about Issues (unaided)

- Healthcare: 52%
- Education: 25%
- Finances: 20%
- Employment: 18%
- Don't Know: 11%
- The Economy: 16%
- Roads: 11%
- Seniors: 6%
- Lower income: 5%

NOTE: Percentages represent all answers combined.

Who's thinking about what issues?

- Demographic variables such as area of residence, age and income all play a part in the issues that are on people's minds.
- Results indicate the majority of respondents think of issues in very general terms. As a result, many verbatim responses were very straightforward, and very similar.
- For a more comprehensive summary of issues see Appendix I.
- Of note: many familiar, higher profile topics are less on the public's mind than might be expected.
  - The fishery: 2%
  - Seats in the HOA: 2%
  - Crime: 2%
  - The environment: 1%
  - CETA: 1%
  - Bill 29: <1%
Provincial Issues: Aided

- Once respondents indicated the issues they thought their government should be focusing on, they were then asked to react to 10 specific issues, and to indicate how important they thought each was.

Question

"How important are each of the following provincial issues to you? Please use a scale of 1 to 10 where 1 is 'not at all important' and 10 is 'extremely important'."

Importance of Provincial Issues: Aided

- Of the 10 issues assessed, improving the quality of healthcare was clearly rated as the most important issue. Seventy-seven percent (77%) provided a rating of either 9 or 10 (out of 10) and 64% provided a rating of 10 out of 10.

- While most issues assessed dealt with longer term concepts and solutions, the issue considered second most important was much more immediate than the others: preventing a repeat of last year's widespread power outages (57% provided a rating of 9 or 10 and 47% provided a rating of 10).

![Chart showing importance ratings of various issues]
Importance of Provincial Issues: Aided (cont'd)

- In contrast to issues considered of critical importance for the government to address, there were two issues that fell well below others in terms of perceived importance. Full day kindergarten and reduction in the number of seats in the House of Assembly. For both of these issues, slightly more than one-half provided a rating between 1 and 6.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Don't know</th>
<th>Not very important (1-4)</th>
<th>Important (5-7)</th>
<th>Very important (8-10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full day kindergarten</td>
<td>41%</td>
<td>40%</td>
<td>29%</td>
<td>20%</td>
</tr>
<tr>
<td>Reduction in number of seats in House of Assembly</td>
<td>35%</td>
<td>35%</td>
<td>20%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Inside the Provincial Issues

- To better understand who, around the province would be most concerned with each of these 10 issues, each issue was cross referenced against four key demographic variables.
- To simplify the overall comparison between demographic groups, mean scores are used to illustrate any differences in opinions.

Key Variables
- Region of the province
- Gender
- Age of respondent
- Household income

NOTE: For each issue, means are circled if they fall 0.4 or more either above or below the provincial mean.
Issue #1: Improving the quality of Healthcare

How important is "improving the quality of healthcare" to various demographic groups around the province?

Provincial Mean (scale of 1-10)

9.2

Mean By Region

- St. John's CMA: 9.1
- East: 9.4
- Central: 9.0
- West: 9.4
- Labrador: 9.8

Mean By Gender

- Males: 8.8
- Females: 9.5

Mean By Age

- 18-34 yrs: 9.3
- 35-64 yrs: 9.1
- 65+ yrs: 9.1

Mean By Income

- <$40k: 9.3
- $40-100k: 9.3
- $100k+: 9.0

Issue #2: Preventing a repeat of last year's widespread power outages

How important is "preventing widespread outages" to various demographic groups around the province?

Provincial Mean (scale of 1-10)

8.3

By Region

- St. John's CMA: 8.2
- East: 8.8
- Central: 8.1
- West: 8.2
- Labrador: 7.0

By Gender

- Males: 7.9
- Females: 8.6

By Age

- 18-34 yrs: 8.2
- 35-64 yrs: 8.0
- 65+ yrs: 8.6

By Income

- <$40k: 8.6
- $40-100k: 8.5
- $100k+: 7.9
Issue #3: Ensuring we have enough skilled labor to meet future demand

How important is "having enough skilled labour" to various demographic groups around the province?

Provincial Mean (scale of 1-10): 8.4

By Region:
- St. John's CMA: 8.0
- East: 8.7
- Central: 8.5
- West: 8.7
- Labrador: 7.9

By Gender:
- Males: 8.1
- Females: 8.6

By Age:
- 16-34 yrs: 8.4
- 35-54 yrs: 8.1
- 55+ yrs: 8.5

By Income:
- <$40k: 8.9
- $40-100k: 8.5
- $100k+: 7.8

Issue #4: Improved public safety

How important is "improving public safety" to various demographic groups around the province?

Provincial Mean (scale of 1-10): 8.0

By Region:
- St. John's CMA: 7.6
- East: 8.3
- Central: 8.2
- West: 8.0
- Labrador: 7.7

By Gender:
- Males: 7.6
- Females: 8.3

By Age:
- 18-34 yrs: 8.4
- 35-54 yrs: 7.7
- 55+ yrs: 7.9

By Income:
- <$40k: 8.4
- $40-100k: 8.1
- $100k+: 7.5
Issue #5: Diversifying the economy

How important is "diversifying the economy" to various demographic groups around the province?

**Provincial Mean (scale of 1-10)**

8.0

### By Region
- St. John's CMA: 8.0
- East: 8.1
- Central: 7.9
- West: 8.2
- Labrador: 8.3

### By Gender
- Males: 8.0
- Females: 8.1

### By Age
- 18-34 yrs: 7.6
- 35-54 yrs: 7.9
- 55+ yrs: 8.5

### By Income
- <$40k: 8.5
- $40-$100k: 7.9
- $100k+: 8.0

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Issue #6: Providing greater support for low income families

How important is "supporting low income families" to various demographic groups around the province?

**Provincial Mean (scale of 1-10)**

7.8

### By Region
- St. John's CMA: 7.6
- East: 8.2
- Central: 7.6
- West: 8.1
- Labrador: 7.7

### By Gender
- Males: 7.5
- Females: 8.1

### By Age
- 18-34 yrs: 8.0
- 35-54 yrs: 7.5
- 55+ yrs: 8.0

### By Income
- <$40k: 8.8
- $40-$100k: 7.9
- $100k+: 7.1
Issue #7: Building new schools to meet future education needs

How important is "building new schools" to various demographic groups around the province?

Provincial Mean (scale of 1-10) 7.8

By Region
- St. John's CMA: 7.7
- East: 8.0
- Central: 8.1
- West: 7.2
- Labrador: 8.0

By Gender
- Males: 7.5
- Females: 8.1

By Age
- 16-34 yrs: 8.4
- 35-54 yrs: 7.6
- 55+ yrs: 7.6

By Income
- <$40k: 8.0
- $40-100k: 7.8
- $100k+: 7.7

Issue #8: Keeping the development of Muskrat Falls on time and on budget

How important is "keeping on top of Muskrat Falls" to various demographic groups around the province?

Provincial Mean (scale of 1-10) 7.3

By Region
- St. John's CMA: 7.0
- East: 7.7
- Central: 7.1
- West: 7.4
- Labrador: 7.9

By Gender
- Males: 7.3
- Females: 7.2

By Age
- 16-34 yrs: 7.1
- 35-54 yrs: 6.9
- 55+ yrs: 7.7

By Income
- <$40k: 7.5
- $40-100k: 7.3
- $100k+: 7.2
Issue #9: Full day kindergarten

How important is "full day kindergarten" to various demographic groups around the province?

Provincial Mean (scale of 1-10) 5.9

By Region
- St. John's CMA: 6.1
- East: 5.9
- Central: 5.4
- West: 6.2
- Labrador: 5.5

By Gender
- Males: 5.6
- Females: 6.1

By Age
- 18-34 yrs: 6.3
- 35-54 yrs: 5.7
- 55+ yrs: 5.9

By Income
- <$40k: 6.8
- $40-100k: 5.7
- $100k+: 5.7

Issue #10: Reduction in the number of seats in the House of Assembly

How important is "reducing the # of seats" to various demographic groups around the province?

Provincial Mean (scale of 1-10) 5.7

By Region
- St. John's CMA: 5.0
- East: 6.6
- Central: 5.6
- West: 6.0
- Labrador: 6.1

By Gender
- Males: 5.4
- Females: 6.0

By Age
- 18-34 yrs: 5.4
- 35-54 yrs: 5.1
- 55+ yrs: 6.4

By Income
- <$40k: 6.5
- $40-100k: 5.7
- $100k+: 5.1
PART 2: GOVERNMENT PERFORMANCE

Government's Performance
- To gather feedback on Government's performance, respondents were asked to rate government's handling of each of 5 specific files/issues.

Question
"How would you rate the current provincial government's handling of each of the following? Please use a scale of 1 to 10 where 1 is 'poor' and 10 is 'excellent.'"
Government's Handling of Issues

- A very small proportion provided ratings of 9 or 10 (out of 10) when asked to rate the current provincial government's handling of various issues.
- Many provided performance ratings between 1 and 6 (from 4% for the Canada-European Union trade deal with Ottawa to 58% for increase of crime in Newfoundland and Labrador).

<table>
<thead>
<tr>
<th>Issue</th>
<th>Don't Know</th>
<th>Rating of 1 to 6</th>
<th>Rating of 7 or 8</th>
<th>Rating of 9 or 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase of crime in Newfoundland and Labrador</td>
<td>11%</td>
<td>28%</td>
<td>51%</td>
<td>8%</td>
</tr>
<tr>
<td>The Mistaken Falls Project</td>
<td>10%</td>
<td>60%</td>
<td>26%</td>
<td>4%</td>
</tr>
<tr>
<td>Fiscal management of public debt and taxes</td>
<td>9%</td>
<td>24%</td>
<td>57%</td>
<td>6%</td>
</tr>
<tr>
<td>Review of Bill 28</td>
<td>10%</td>
<td>22%</td>
<td>44%</td>
<td>16%</td>
</tr>
<tr>
<td>The Canada-European Union trade deal with Ottawa</td>
<td>10%</td>
<td>19%</td>
<td>90%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Approximately one-fifth (21%) were unable to rate the government's performance on the Canada-European Union trade deal with Ottawa.

Performance Scorecard: Increase in Crime

How has government handled the increase in crime in the province?

Provincial Scorecard (Based on mean scores from a scale of 1-10)

- Don't Know = 3%
- St. John's CMA: 5.7
- East: 5.8
- Central: 5.8
- West: 6.1
- Labrador: 6.1

By Gender

- Male: 5.9
- Female: 5.8

By Age

- 18-34 yrs: 6.0
- 35-54 yrs: 5.7
- 55+ yrs: 5.9

By Income

- <$50k: 6.2
- $50-100k: 6.1
- $100k+: 5.4
### Performance Scorecard: Muskrat Falls

**How has government handled the Muskrat Falls project?**

**Provincial Scorecard** (based on mean scores from a scale of 1-10)

- **5.6**
- **Don't Know – 8%**

**By Region**
- St. John's CMA: 5.2
- East: 6.0
- Central: 5.9
- West: 5.7
- Labrador: 5.3

**By Gender**
- Males: 5.6
- Females: 5.5

**By Age**
- 18-24 yrs: 6.0
- 25-54 yrs: 5.2
- 55+ yrs: 5.7

**By Income**
- <$40k: 6.3
- $40-100k: 5.8
- $100k+: 5.0

---

### Performance Scorecard: Handling of CETA

**How has government handled the CETA deal with Ottawa?**

**Provincial Scorecard** (based on mean scores from a scale of 1-10)

- **5.6**
- **Don't Know – 21%**

**By Region**
- St. John's CMA: 5.2
- East: 5.9
- Central: 6.0
- West: 5.3
- Labrador: 6.2

**By Gender**
- Males: 5.4
- Females: 5.8

**By Age**
- 18-24 yrs: 6.1
- 25-54 yrs: 5.3
- 55+ yrs: 5.6

**By Income**
- <$40k: 6.3
- $40-100k: 5.6
- $100k+: 5.2
Performance Scorecard: Fiscal Management

How has government handled fiscal management in light of lower oil prices?

Provincial Scorecard (based on mean scores from a scale of 1-10)
Don't Know – 10%

By Region
- St. John's CMA: 5.3
- East: 5.5
- Central: 5.7
- West: 5.5
- Labrador: 5.9

By Gender
- Males: 5.3
- Females: 5.8

By Age
- 18-34 yrs: 5.7
- 35-54 yrs: 5.3
- 55+ yrs: 5.7

By Income
- <40k: 6.3
- 40-100k: 5.5
- >100k+: 5.0

Performance Scorecard: Bill 29

How has government handled the review of Bill 29?

Provincial Scorecard (based on mean scores from a scale of 1-10)
Don't Know – 15%

By Region
- St. John's CMA: 5.0
- East: 5.8
- Central: 5.8
- West: 5.4
- Labrador: 5.6

By Gender
- Males: 5.3
- Females: 5.6

By Age
- 18-34 yrs: 5.9
- 35-54 yrs: 5.3
- 55+ yrs: 5.3

By Income
- <40k: 6.0
- 40-100k: 5.6
- >100k+: 4.8
Quality of Life in Newfoundland and Labrador

- After asking respondents to consider issues that are important to them, (and how they feel their government is responding to key issues), people were asked to consider their own situations and think about what areas or issues government should focus on to make a difference in their quality of life.

Question:
"Thinking about your quality of life, what is the one issue or area that the provincial government should focus on to improve your quality of life in Newfoundland and Labrador?"

Quality of Life

- The one dominant area where residents felt their provincial government could focus on to improve their quality of life is healthcare.

- Table showing the distribution of responses:
  - Healthcare: 37%
  - Employment/Jobs: 5%
  - Taxes: 5%
  - Transportation: 5%
  - Pensions: 4%
  - Education: 4%
  - Economy: 4%
  - Support for seniors: 4%
  - Don't know: 11%

Healthcare Includes:
- Wait times to see a specialist, wait times at emergency, shortage of nurses, shortage of doctors, access to healthcare, healthcare for seniors and long term care.
Public Opinion: Reducing the Number of Seats in the House of Assembly

Respondents were asked a series of questions to better understand their reactions to the possible reduction of the number of seats in the House of Assembly.

Topic Areas
Do people support a reduction?
Is it worth acting quickly to realize $ savings?
Is it worth completing now if it caused the election date to move?

---

Do People Support a Reduction?

Question:
"One issue that has been talked about in the media for the past few days has been the possible reduction in the number of seats in the House of Assembly. Do you strongly support, support, oppose or strongly oppose reducing the number of seats in the House of Assembly?"

- The majority of Newfoundlanders and Labradorians (63%) either strongly support or support reducing the number of seats in the House of Assembly.
- Approximately one-quarter (24%) either strongly oppose or oppose the reduction.

---

24% Strongly oppose/Oppose

63% Strongly support/Support

5% Don't know

14% Oppose

9% Neither support nor oppose

23% Support
Do People Support a Reduction? (cont’d)

The table below details results by region. Results are fairly consistent across each of the regions.

<table>
<thead>
<tr>
<th></th>
<th>Overall (n=662)</th>
<th>St. John’s CMA (n=213)</th>
<th>Other Eastern (n=135)</th>
<th>Central (n=115)</th>
<th>Western (n=104)</th>
<th>Labrador (n=31)</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Strongly support/support</td>
<td>69%</td>
<td>60%</td>
<td>64%</td>
<td>61%</td>
<td>60%</td>
<td>67%</td>
</tr>
<tr>
<td>% Strongly oppose/oppose</td>
<td>20%</td>
<td>19%</td>
<td>28%</td>
<td>25%</td>
<td>27%</td>
<td>18%</td>
</tr>
</tbody>
</table>

*NOTE: Throughout this report, “n” refers to sample size*

Is it Worth Acting Quickly?

**Question:**
“The government has indicated that reducing the number of seats from 48 to 38 before the next election will save around 10 million dollars. To get these savings now, the government would have to act quickly. With this in mind, do you strongly agree, agree, disagree or strongly disagree with pushing to complete the review before the next election?”

- The majority of Newfoundlanders and Labradors (67%) either strongly agree or agree with the government pushing to complete the review before the next election.
Is it Worth it, if it Moved the Election Date?

Question:
"If you heard in the media that this review could cause the election date to move, would you still agree with completing the review now?"

- The vast majority (86%) of those who agree with pushing to complete the review before the next election also agree with completing the review before the next election even if it could cause the election date to move.

Privatizing of Government Services
- Respondents were asked about their level of support for the general notion of privatizing government services.
- No additional information or insights were provided to respondents.

Question:
"Another issue that has surfaced in the past has been the possible privatizing of government services...

...On a scale of 1 to 10 with a 1 meaning 'not at all supportive' and a 10 meaning 'very supportive', how supportive would you be of the privatizing of government services?"
Privatizing of Government Services

- Based on responses to the question asked, there appears to be marginal support among Newfoundlanders and Labradorians for privatizing government services.
  - The majority, two-thirds (66%) provided a rating of six or less on a 10-point scale.
    - In fact, twenty-five percent (25%) provided a rating of 1 ('not at all supportive').
  - For those who do support such a move, much of that support can be characterized as "moderate".
    - A small proportion (9%) provided a rating of 9 or 10.
  - Only 8% were unable to offer an opinion (don't know)

---

Part 3: Government Spending & The Provincial Budget
Reducing Government Spending

- Knowing there may be a need to reduce spending in the upcoming provincial budget, respondents were asked to choose the area of possible spending cuts that would be most acceptable to them.
- A series of 5 areas were presented for their consideration.
- Respondents were asked for their 1st, 2nd and 3rd most acceptable choices.

**Question:**

“As reported recently in the media it is being projected that the provincial budget deficit may rise significantly this year. If the provincial government had to reduce spending to better manage the budget, which one of the following areas would be the most acceptable area to cut? Second most acceptable? Third most acceptable?”

---

**Reductions in Government Spending**

- The most acceptable first choice, and the most acceptable choice overall was a cut in the "size of the public service".
- After "the size of the public service" the gap was much smaller between all other choices presented.
- Cuts in "Investment in Economic Development" was consistent as a 1st, 2nd and 3rd choice.
- The least acceptable "first choice" for cuts was to "Gov. programs and services".
- The least acceptable choice for cuts overall by a slight margin was "roadwork".
Reductions in Government Spending (cont'd)

- To better reflect the difference in tolerance between a respondent’s first, second and third choice, data was recalculated using a value of 1.5 for the first choice, 1 for the second and .5 for the third.
- The combined totals resulted in an even greater gap between the acceptability of public service cuts versus all other options.
- Economic development cuts and infrastructure cuts received the next highest acceptability scores.

```
Combined Score

<table>
<thead>
<tr>
<th>Public Service</th>
<th>Economic Dev</th>
<th>Infrastructure</th>
<th>Gov Programs</th>
<th>ReForm</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
<td>40</td>
<td>30</td>
<td>20</td>
<td>10</td>
</tr>
</tbody>
</table>
```

"Would you expect your government to make tough decisions even if it may impact or cut some government services?"

- No: 7%
- DK/Refused: 3%
- Yes: 90%

Messaging Scenarios

- To further test possible reactions to various approaches to the budget, respondents were asked to react to a series of possible headlines in the media following the release of the next provincial budget.

**Question:**

"Imagine for a moment that it is the morning after the next provincial budget and you are reacting to news headlines. How would you respond to each of the following headlines? Please use a scale of 1 to 10 where 1 is ‘very unacceptable’ and 10 is ‘very acceptable’.

Scenario I: Government cuts spending to control the deficit
Scenario II: Government maintains spending to keep the economy strong
Scenario III: Major infrastructure projects are shelved
Scenario IV: Government increases taxes"
Messaging Scenarios

- There were clear differences in the acceptability of the 4 scenarios provided.
- Virtually everyone had an opinion on every scenario presented (minimal 'don't know' responses).
- The most acceptable headline: "Government cuts spending to control the deficit".
- Interestingly, the second highest rated scenario was the opposite of this: "Government maintains spending to keep the economy strong".

Behind the Scenarios
To understand the support behind the scenarios presented, responses were cross referenced against key demographic variables.
**Scenario I**

Government cuts spending to control the deficit.

**Provincial Mean (scale of 1-10)**

- **6.8**

**Region**
- St. John's CMA: 6.6
- East: 6.8
- Central: 7.2
- West: 6.7
- Labrador: 7.0

**Gender**
- Males: 6.9
- Females: 6.7

**Age**
- 18-34 yrs: 6.4
- 35-64 yrs: 7.0
- 65+ yrs: 6.9

**Income**
- <$40k: 6.5
- $40-100k: 6.9
- >$100k: 7.0

---

**Scenario II**

Government maintains spending to keep the economy strong.

**Provincial Mean (scale of 1-10)**

- **6.1**

**Region**
- St. John's CMA: 5.8
- East: 6.1
- Central: 6.7
- West: 6.3
- Labrador: 5.8

**Gender**
- Males: 5.9
- Females: 6.3

**Age**
- 18-34 yrs: 6.1
- 35-64 yrs: 5.9
- 65+ yrs: 6.4

**Income**
- <$40k: 6.8
- $40-100k: 6.2
- >$100k: 5.6
Scenario III

Major infrastructure projects are shelved.

Provincial Mean (scale of 1-10)

5.6

Region

- St. John's CMA: 5.8
- East: 5.4
- Central: 5.6
- West: 5.4
- Labrador: 6.4

Gender

- Males: 5.7
- Females: 5.5

Age

- 18-34 yrs: 5.9
- 35-54 yrs: 5.6
- 55+ yrs: 5.5

Income

- <$40k: 5.7
- $40-100k: 5.4
- $100k+: 5.9

Scenario IV

Government increases taxes.

Provincial Mean (scale of 1-10)

3.9

Region

- St. John's CMA: 3.9
- East: 3.6
- Central: 4.1
- West: 3.6
- Labrador: 4.4

Gender

- Males: 3.9
- Females: 3.8

Age

- 18-34 yrs: 4.2
- 35-54 yrs: 3.6
- 55+ yrs: 3.9

Income

- <$40k: 3.7
- $40-100k: 3.6
- $100k+: 4.4
PART 4: GOVERNMENT LEADERSHIP

Leadership Highlights

"How would you rate Paul Davis' performance as Premier of Newfoundland and Labrador so far? Please use a scale of 1 to 10 where 1 is 'poor' and 10 is 'excellent'."

Performance as Premier of Newfoundland and Labrador so far

...and why did you provide that rating?
(For all ratings of 6 or lower)

- He has appointed people to positions that the public doesn't agree with
- He hasn't been in the position long enough
- He is average, doing ok
- Poor handling of the reduction of taxes
PART 5: INTERNET & SOCIAL MEDIA USAGE

Internet Usage

Question: "In a typical week, approximately how many hours in total do you spend on the internet for personal use?"

- In a typical week, Newfoundlanders and Labradorians spend an average of 9.2 hours on the internet for personal use. This finding is consistent with the Canadian average. According to comScore, Canadians spend an average of 11.3 hours per week on the internet*.

- As detailed in the graph below, 28% spend more than 10 hours per week online.

*Source: 2012 Canada Digital Future In Focus.
Personal Time On the Internet

In a typical week, approximately how many hours do you spend on the internet for personal use?

Provincial Mean (number of hours)

9.2

By Region

St. John's CMA | East | Central | West | Labrador
10.0 | 9.2 | 8.1 | 8.7 | 10.5

By Gender

Males | Females
9.2 | 9.2

By Age

18-34 yrs | 35-54 yrs | 55+ yrs
12.0 | 8.4 | 8.4

By Income

<50k | $50-100k | $100k+
8.9 | 9.3 | 9.5

NOTE: Means are circled if they fall 0.4 or more either above or below the provincial mean.

Social Media Usage

Question: “Which of the following social networking sites do you use on a regular basis?”

- Usage levels highest for Facebook (70%) and lowest for LinkedIn (12%) and blogs (8%).
Inside the Numbers
To better understand social media usage, results were cross referenced against key demographic variables.

NOTE: Percentages are circled if they fall more than 5 percentage points either above or below the provincial result.

Use of Twitter

Do you use Twitter on a regular basis? (percentage who said 'yes')

Provincial Result (percentage who said 'yes')

17%

By Region
- St. John's CMA: 24%
- East: 12%
- Central: 12%
- West: 15%
- Labrador: 8%

By Gender
- Males: 19%
- Females: 15%

By Age
- 18-34 yrs: 26%
- 35-54 yrs: 20%
- 55+ yrs: 9%

By Income
- <$10k: 11%
- $10-100k: 14%
- $100k+: 24%
Use of Facebook

Do you use Facebook on a regular basis? (percentage who said 'yes')

Provincial Result (percentage who said 'yes') 70%

By Region
- St. John's CMA: 67%
- East: 74%
- Central: 74%
- West: 63%
- Labrador: 84%

By Gender
- Males: 62%
- Females: 77%

By Age
- 18-34 yrs: 93%
- 35-54 yrs: 71%
- 55+ yrs: 55%

By Income
- <$40k: 57%
- $40-100k: 74%
- $100k+: 76%

Use of YouTube

Do you use YouTube on a regular basis? (percentage who said 'yes')

Provincial Result (percentage who said 'yes') 52%

By Region
- St. John's CMA: 55%
- East: 45%
- Central: 56%
- West: 48%
- Labrador: 59%

By Gender
- Males: 55%
- Females: 50%

By Age
- 18-34 yrs: 75%
- 35-54 yrs: 55%
- 55+ yrs: 35%

By Income
- <$40k: 34%
- $40-100k: 55%
- $100k+: 63%
Use of LinkedIn

Do you use LinkedIn on a regular basis? (percentage who said 'yes')

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. John's CMA</td>
<td>17%</td>
</tr>
<tr>
<td>East</td>
<td>13%</td>
</tr>
<tr>
<td>Central</td>
<td>6%</td>
</tr>
<tr>
<td>West</td>
<td>9%</td>
</tr>
<tr>
<td>Labrador</td>
<td>3%</td>
</tr>
</tbody>
</table>

Provincial Result (percentage who said 'yes')

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Males</td>
<td>13%</td>
</tr>
<tr>
<td>Females</td>
<td>10%</td>
</tr>
</tbody>
</table>

By Age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34 yrs</td>
<td>5%</td>
</tr>
<tr>
<td>35-54 yrs</td>
<td>16%</td>
</tr>
<tr>
<td>55+ yrs</td>
<td>11%</td>
</tr>
</tbody>
</table>

By Income

<table>
<thead>
<tr>
<th>Income Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$40k</td>
<td>3%</td>
</tr>
<tr>
<td>$40-100k</td>
<td>7%</td>
</tr>
<tr>
<td>$100k+</td>
<td>12%</td>
</tr>
</tbody>
</table>

Use of Blogs

Do you use Blogs on a regular basis? (percentage who said 'yes')

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. John's CMA</td>
<td>10%</td>
</tr>
<tr>
<td>East</td>
<td>5%</td>
</tr>
<tr>
<td>Central</td>
<td>9%</td>
</tr>
<tr>
<td>West</td>
<td>7%</td>
</tr>
<tr>
<td>Labrador</td>
<td>2%</td>
</tr>
</tbody>
</table>

Provincial Result (percentage who said 'yes')

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Males</td>
<td>7%</td>
</tr>
<tr>
<td>Females</td>
<td>8%</td>
</tr>
</tbody>
</table>

By Age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-34 yrs</td>
<td>11%</td>
</tr>
<tr>
<td>35-54 yrs</td>
<td>6%</td>
</tr>
<tr>
<td>55+ yrs</td>
<td>8%</td>
</tr>
</tbody>
</table>

By Income

<table>
<thead>
<tr>
<th>Income Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$40k</td>
<td>3%</td>
</tr>
<tr>
<td>$40-100k</td>
<td>7%</td>
</tr>
<tr>
<td>$100k+</td>
<td>12%</td>
</tr>
</tbody>
</table>
Client: Government of Newfoundland and Labrador
Project: Newfoundland and Labrador Issues Research
Methodology: Qualitative-Focus Groups (Online)
Date: February 5 and 9th, 2015

Project Snapshot
The Topic: Understanding issues of importance to Newfoundlanders and Labradorians

The Challenge: As part of pre-budget consultations, the Government of Newfoundland and Labrador desired an understanding of issues of importance to residents of the province to inform decision-making. A deeper understanding of issues identified through the quantitative survey (phase 1) was desired.

Key Issues Explored: The key issues identified in the survey for further exploration included:

- the areas of concern for residents, in particular understanding the dimensions of health care of most concern. (Given health care was identified as the most important issue for the most residents in the survey); and
- approaches to dealing with the up-coming budget deficit and in particular, exploring reductions in government spending.

While not directly identified in the survey, several additional topics were related and explored with participants including the level of knowledge and concern around the province’s financial situation, perceptions of the contributing factors such as falling oil prices and assessments of the anticipated length of the impacts and the severity.

Provincial Input: This document represents a summary of the discussions held. There was representation from around the province, with the following communities represented – St. John’s, Corner Brook, Lewisporte, Musgravetown, Labrador City, Gambo, Roddickton, Witless Bay and Conception Bay South. Two online sessions were held with individuals residing in communities outside the St. John’s CMA and Avalon areas and one was held with residents in the populous St. John’s CMA/Avalon region.
Research Note
It is worthy to note that several people in each session made a point to mention that they are not really in-tune with politics. While there were a few who obviously had a stronger interest in all things political, there was a notable disengagement in following the political scene by a substantial number of participants. With that said, there was much discussion throughout all sessions, especially around the issues of importance.

Discussion Highlights

Topic Area I: Issues of Importance

The top-of-mind issues identified to be important to participants were very similar to those identified by the survey.

- These included:
  - Health care – by far the most important issue felt to be facing the province;
  - The economy – especially heightened due to the falling price of oil and the implications on government revenues;
  - Low-income family issues – most notable in the St. John’s CMA/Avalon region, yet also noted and seen to be a provincial issue; and
  - Muskrat Falls – not so much the project but the controversy surrounding it.

- Additional issues mentioned, which were top-of-mind for participants included:
  - Government – the current political situation and anticipated budget;
  - Falling oil prices - the implications for the economy and people.

- Several other issues were noted by a few participants, but were generally less top-of-mind or issues for isolated areas or specific individuals. These were:
  - Concern over a developing “drug culture” – mentioned by several participants living in rural and urban areas of the province.
  - Education – cost of post-secondary education as well as full-day Kindergarten.

Discussion on the Issues

The value of exploring issues in a focus group setting is the ability to better understand the dimensions of issues that are important. To that end, participants were asked to articulate what their concerns were around the issues. The following discussion identifies these dimensions.
Health Care
Health care and its impact on the quality of life of residents were the top issue for participants. It is an issue that affects everyone and given the potentially significant negative impacts, the importance of the issue was heightened for people. In this exercise we went inside the general healthcare topic to better understand the specific areas that were driving overall concern.

The following main concerns around healthcare are presented below in order of mention and degree of concern and thus importance. It should be noted, for those in rural areas, access and physician retention was more regularly mentioned by participants than by St. John’s CMA participants.

- **Wait times for services was an issue.**
  - The wait times to receive treatments, consult physicians and specialists was noted to translate into longer periods of suffering, financial burden, fear of not receiving diagnosed in a timely fashion for acute illnesses that can result in death.
  - People mentioned wait times to see specialists and physicians, but also wait times to have tests conducted (MRIs for example). This was particularly noted across the communities, but was heightened in more rural areas of the province.

- **Access where you are, or close to where you live was an issue, especially for those living off the Avalon Peninsula.**
  - Those living in rural areas spoke of the cost and psychological impact of parents and family needing to travel great distances to access facilities and equipment to receive treatments such as chemotherapy, radiation, dialysis and for follow-up check-ups and monitoring.
  - Many off the Avalon spoke of the regular need for fundraisers to assist people in their communities who were required to travel to more central locations or St. John’s where some health care services are centralized.
  - The number of trips and the distance travelled often meant that individuals, especially older people, did not have the supports necessary to assist them as they often had no one to travel with them and found costs to be burdensome.

- **Lack of physicians is seen as an issue.**
  - Family physicians and retention of physicians in more rural areas was noted. People felt they cannot access adequate health care services.
  - While lack of specialists was noted, and also implied through discussions on long wait times to see specialists, it was especially noted by St. John’s CMA and Avalon residents.
Other healthcare inputs:
- When people were presented with the fact that health care costs comprise the largest share of the provincial budget, there was recognition that much money is spent. That said, several things were mentioned that were felt to contribute to this:
  - Among rural residents:
    - re-doing tests (blood tests, x-rays) when going to another health care facility were noted;
    - Lack of communication on appointment changes or facility changes causing added burden on those who already made arrangements for travel and accommodations.
    - Several individuals noted the use of tele-health for follow-up consultations which, even for older patients was seen to be more acceptable and less of a strain. People were positive on the use of tele-health methods to bring services closer to them.

- Despite the high cost of delivery and provision of existing services, residents feel that there should be solutions that can improve their access to services, with several mentioning changing scopes of practice for some health care professionals, having physicians and specialists travel to them. One individual who worked in the health care system noted that locums are used, but that they are very expensive to deliver.

The Economy
Given current events, participants were becoming concerned about the economy. There appears to be some growing malaise around jobs and sustained meaningful, high paying employment. Specific things mentioned are noted below:
- Concerns about the economy are stemming from the falling oil prices and the recent layoffs announced by oil and gas companies and the closure of the mine in Labrador West. These events are making people more conscious of the nature of resource-based revenues.
- Many expect that the falling oil prices will be a 1 to 2 year issue for the Province, thus the effects are currently expected to be relatively short-term; a few started to doubt the rebound.
- Several wondered just how dependent the provincial economy is on the oil and gas sector, which spurred discussion on the need to diversify the economy if we have an over-reliance on this resource sector.
- Once again the urban-rural divide was evident and pronounced. There was seen to be a focus of development and investment on the Avalon Peninsula by governments and companies that was not being seen in other parts of the province. One individual noted that the “over-pass” syndrome was now even more pronounced than it has ever been.
• There was no mention of ensuring the province has skilled labour to meet needs. This is likely a result of current events and lay-offs and thus there appears to a sense, even among rural areas, that skilled and unskilled labour is back in the Province due to layoffs in the oil sector in Alberta.

Low-income family issues
Low-income family issues were noted and often stemmed from discussions and concerns about the cost-of-living, especially in those communities where money from the oil and gas sector has been fueling the economy. These issues related to low-income families were mentioned most frequently by those living in the St. John’s CMA area but were also noted by people in other areas of the province.
• Highlighted topics
  o Most mentioned the lack of affordable housing.
  o Others mentioned the high cost of medical expenses (medications, treatments).
  o Several also mentioned the growing divide between rich and poor in the province and the shrinking middle class.
  o A number of participants noted the lack of affordable day-care which related to people not being able to sustain meaningful employment due to the high costs of childcare.

Education
As an issue, education received few mentions from participants.
• It is worthy to note that several individuals in the sessions were educators and that they, as well as several others noted that full-day kindergarten was needed and should not “get the axe” as government looks to restrain spending. For some, this was linked to the lack of affordable childcare.
• Only one or two mentioned the cost of post-secondary education and ensuring we were training people for sustainable jobs.

Muskrat Falls
Interestingly, proceeding with the Muskrat Falls project was not seen to particularly be the issue – some felt that the province needed to proceed with the project, while others were still unsure whether it was needed or not. The real issue around Muskrat Falls was seen to be the lack of information provided upfront, the seeming lack of transparency of information and the controversy surrounding the decision and how it was made in the first place.
Topic Area II: Government and the Budget

A second key topic discussed with participants related to their impressions of the Province's current financial situation and topics related to expectations of the upcoming budget. Following are the key topic areas that surfaced in discussions.

- Impact of falling oil prices: In a number of sessions, several people mentioned the falling oil prices and its inevitable negative impact on the upcoming budget.
  - There was also a sense that falling oil prices will affect us for several years, so the effects will be felt for more than this upcoming budget.
  - Generally, though, almost all participants felt it would rebound. Thus there were expectations for a belt-tightening budget but this sense of short-term effect seems to have people feeling that the budget shouldn't be extreme, or as extreme as if the revenue loss was going to be more permanent.

- Potential impact on public servants: There was a malaise about what negative cuts would come and how it would affect public servants, especially frontline staff responsible for delivering programs and services as well as public sector unions. There was concern by those who would be directly affected and that recently negotiated raises would not be implemented.
  - Those in any form of public service position were worried that they will be negatively affected.

- The need for a vision: Also noted by several individuals and implied throughout the discussion, there was a desire for an articulated vision for the province that appears to be currently missing.

- Malaise about our financial situation exists: Participants appeared unsure of our true financial situation and our degree of dependence on oil and gas. It appeared they yearn a longer-term view and plan for how we manage our way through this anticipated short-term issue.
  - There was some concern noted about government's inability to project our financial situation (large changes in estimated deficits) as well as the price of oil used to make projections. This implies poor management of our finances.

- People do not know what options are available: People did not want to see cuts in programs and services, yet were at a loss to really identify how government should deal with the fiscal realities it is facing – obviously people do not want to be directly affected and if so, they want the negative impacts to be minimal.
The Upcoming Budget: Comparison of headline messages

To better understand and help individuals discuss choices for the up-coming budget, four different headlines were explored in the three groups. Reaction to each is discussed below.

- Most expected and likely: Government cuts spending to control the deficit.
  - Given the decline in oil prices, participants were bracing for cuts.
  - There was skepticism among some that the degree of cuts is being over-stated as a ploy to make the actual cuts more palatable when they are announced.
  - There were concerns about where the cuts will occur – participants from public sector groups such as teachers, nurses voiced concern over wage freezes and/or loss of negotiated increases. Most participants felt that road and bridgework had to continue and should not be cut given the state of some of the infrastructure. The size of the public service was noted, with some mentioning that administrative streamlining could improve efficiencies. Some felt they did not understand the role of political assistants or the need for some government departments stating that they couldn’t understand what the some department and its workers would even be doing.
  - Cuts to programs and services were least desired and cuts to front-line delivery will be most negatively perceived. Cuts related to streamlining administrative processes; over-staffed areas or staffing in departments (political and otherwise) that less directly impact individual would be expected and were more acceptable to participants.
  - Related to this point, making program and service delivery more cost effective was noted. One way mentioned by several and endorsed by many once suggested was making the service delivery of health-care more cost-effective through things like tele-health and advances in having one-patient record which could negate the need for extra travel or extra testing. This would be well-received and also serve to increase accessibility.

- Second most expected and relatively more palatable than anticipated: Government increases taxes.
  - Participants felt that increased taxes would not be a surprise. While there was debate about whether the taxes raised should be personal income, HST, or commodity taxes, most felt that personal income taxes were already too high. Commodity taxes were referred to by several as luxury taxes (tobacco and alcohol) and thus were seen to be less of an issue if raised. Interestingly, a number mentioned that the HST was higher years ago and that an increase, especially a temporary one to help us “get over the hump” would not be too bad.
- Participants were quick to note that any increase of the HST had to be for a short period or for very specific purpose(s).

  - Most ambivalence noted toward the third headline: **Major infrastructure projects are shelved.**
    - Many wondered what infrastructure projects would be shelved.
    - Those on the west coast of the Province lamented the lack of progress on the Corner Brook hospital and that this hospital was much needed;
    - Halting school projects was also seen to be a backward move by some in that the infrastructure had been neglected for so long that putting things on hold just did not seem to be appropriate.
    - Shelving roadwork or bridgework was not welcomed.
    - Shelving of infrastructure projects will be perceived to be broken promises and for those residing in the areas of such projects, there is a sense that the investment is long overdue. For areas affected off the Avalon Peninsula this will be perceived to add fuel to the perceived "importance" of rural communities and life, resulting in the feeling of a double standard.

- The headline most criticized: **Government maintains spending to control the deficit.**
  - While one group of rural residents thought this was a good idea and would enable us to "spend our way" out of the perceived short-term downturn, most people in other sessions felt it to be laughable.
  - There was a sense that the government would have some explaining to do if this was the approach.
  - For most, this would be perceived to be irresponsible.
Take-Aways

With the input from these three well-dispersed groups in mind, there were a number of take-aways to be considered moving forward:

Issues:
1. Health care is indeed the issue of top importance to people and there are common issues across urban and rural communities – wait times to see specialists, retention of physicians (family and specialists) and other health care workers; however, access and the costs and strain of transportation and need for frequent trips of long distances for many, especially the aging population, was seen to be of great concern to those living off the Avalon Peninsula. Health care is also seen to be the issue which should be addressed to improve people's quality of life – it is an issue which directly affects people and is both personal and emotional.

2. There appears to be a rural versus St. John's/Avalon divide that seems to be exacerbated by perceptions of the economy, job activity and investment being focused in urban areas of the Province, particularly the Avalon Peninsula. Those in rural areas are feeling abandoned. The investments in large infrastructure projects, the pulling of jobs to more centralized hubs was seen by those in relatively more rural areas to be an insult to them and made them feel that they are being treated differently, and thus are less important than others living in more central, urban areas. Regionalization of services such as health care and even the availability of services such as chemotherapy only in St. John’s further reinforce these perceptions and feelings of double standard based on where one lives.

3. There was also a hint of a divide between those working in the oil and gas industry and those not noted within rural areas of the Province
   a. Even in communities like Gambo and Roddickton, the gap between the richer and poorer residents of the Province manifested itself. This is being driven by the difference in salaries earned by those working in the oil and gas sector (doing rotations in Alberta) compared to those from jobs available in the Province, outside this sector.
   b. This, as expected, was also mentioned by many living in the St. John’s CMA and Avalon areas. This growing gap was also linked to issues for low-income families and in particular the cost of and lack of affordable housing.
Budget Priorities:
4. Participants want to limit the personal impacts of any austerity measures taken by the government in a budget; thus any reduction in services of project funding that limits the number of people affected will be more palatable. Smaller increases in any form of taxation will be better than larger increases (if there have to be any).

5. There is a desire for cutting perceived unnecessary expenses such as duplication of administration within departments, or even eliminating or reducing ambiguously defined departments that have little meaning to the everyday person rather than cuts to frontline services, especially in those areas with direct relevance and delivery to residents (e.g. health care, education). Residents are looking for savings due to improved efficiencies in processes rather than reduction of services.

6. Creative solutions to healthcare delivery that reduce costs or at least provide better access for the same dollars spent would be well-received.