



# Ottawa Business Matters

2021 Federal Election  
Survey Report

---



## Ottawa Business Matters

### September 2021 – Federal Election Survey

#### Introduction

In collaboration with Leger and the Canadian Global Cities Council (CGCC), a coalition of CEOs from nine of Canada's largest urban Chambers of Commerce and Boards of Trade, the Ottawa Board of Trade conducted a federal election survey of its members to create a clear picture of what its members want to see from Canada's next government. The federal election survey includes public and business community views on key election issues.

This report provides the key findings from a survey of 400 residents in Ottawa (not Gatineau) and 1,349 members of Ottawa's business community, conducted between August 19 and August 30 2021, using Leger's online panel for the general population data and an open link sent to the board for the business data.

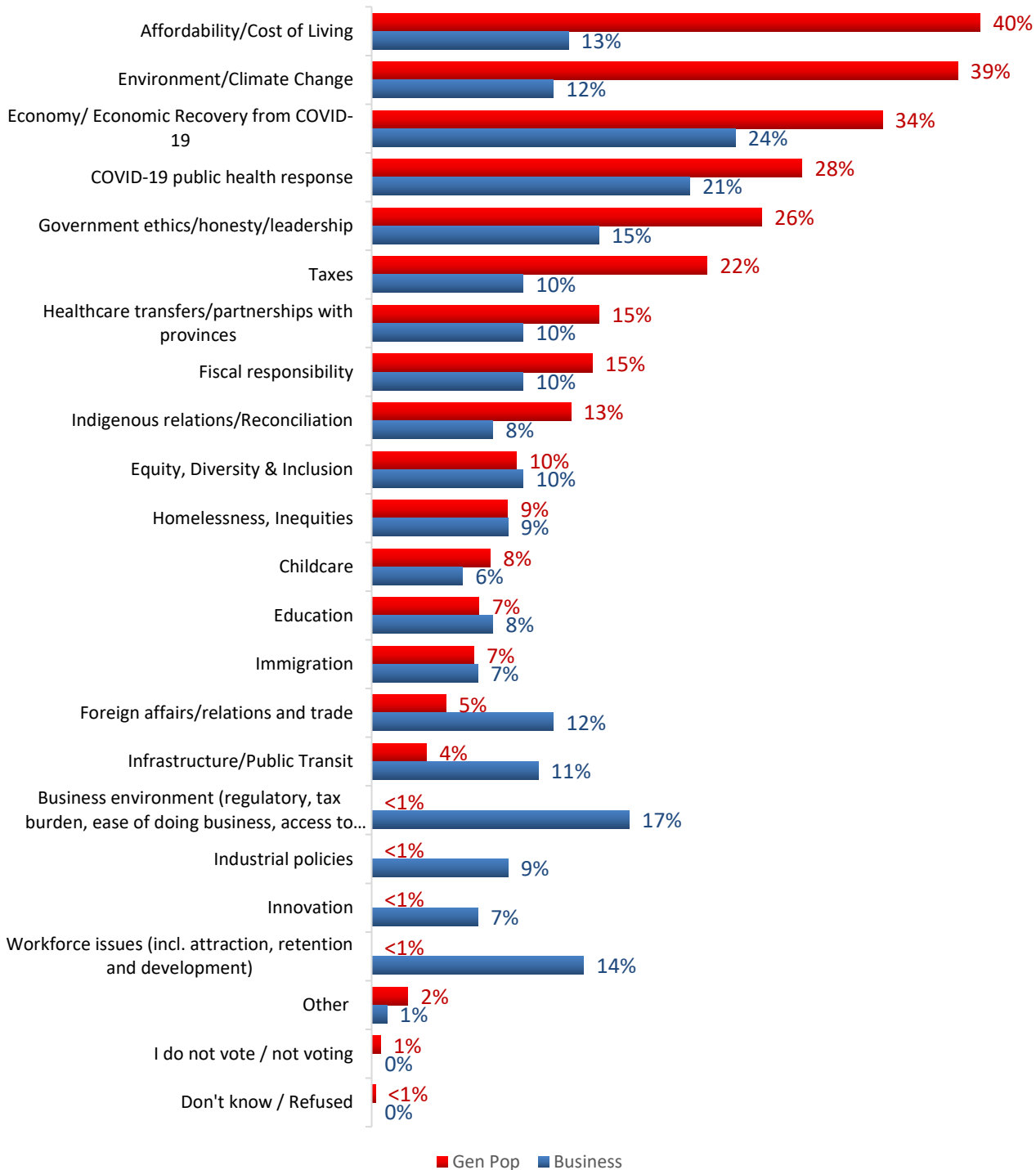
Weighting has been employed to ensure that the general population sample composition accurately reflects the adult population of the region, as per the latest census data. No margin of error can be associated with a non-probability sample (i.e. a web panel in this case). For comparative purposes, though, a probability sample of 400 respondents as is the case with the *general population* data would have a margin of error of  $\pm 4.9\%$ , 19 times out of 20.

#### Key Findings

##### MOST IMPORTANT ISSUES

- The 2021 federal elections will be impacted by a plethora of issues, mainly revolving around economic and ecological matters. Over a third of the general population cares mostly about affordability (40%), the environment and climate change (39%), and the economic recovery from COVID-19 (34%). Affordability is significantly more of an issue for younger respondents (18-34: 49%), in comparison with those who are over 55 years old.
- While the general population is mainly concerned with their finances and the climate situation, businesses value mainly aspects that will impact their ability to pursue their activities in optimal conditions: the economic recovery from COVID-19 (24%), the COVID-19 public health response (21%) and the business environment (17%) are at the forefront of the most influential issues.

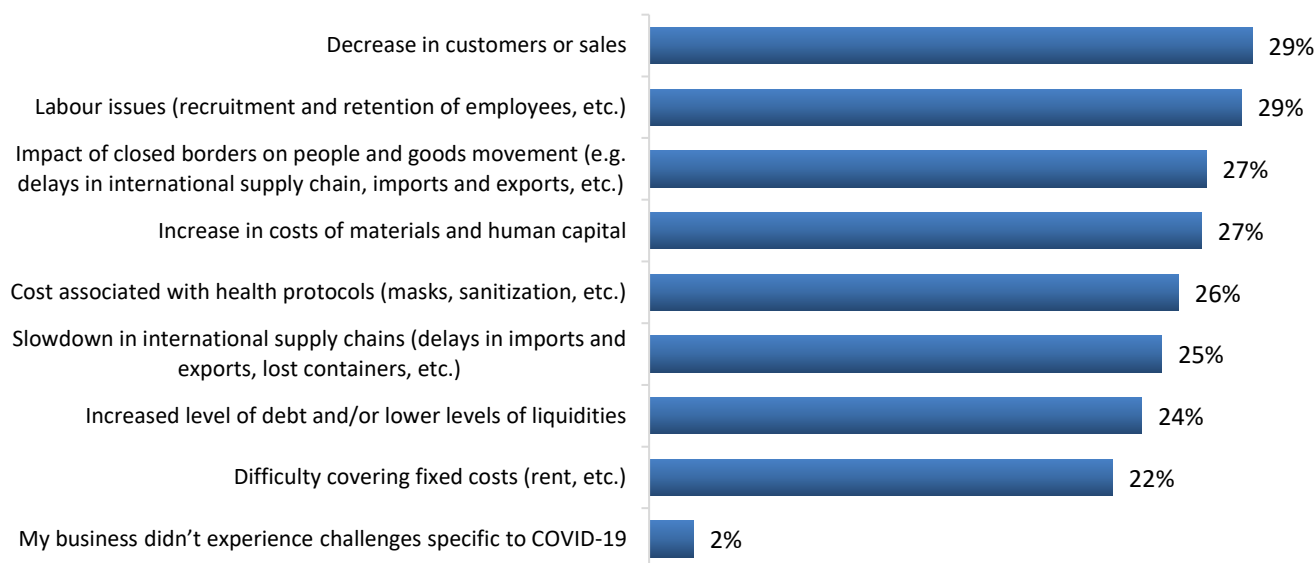
## What are the most important issues that will influence how you vote in the Federal Election on September 20th 2021?



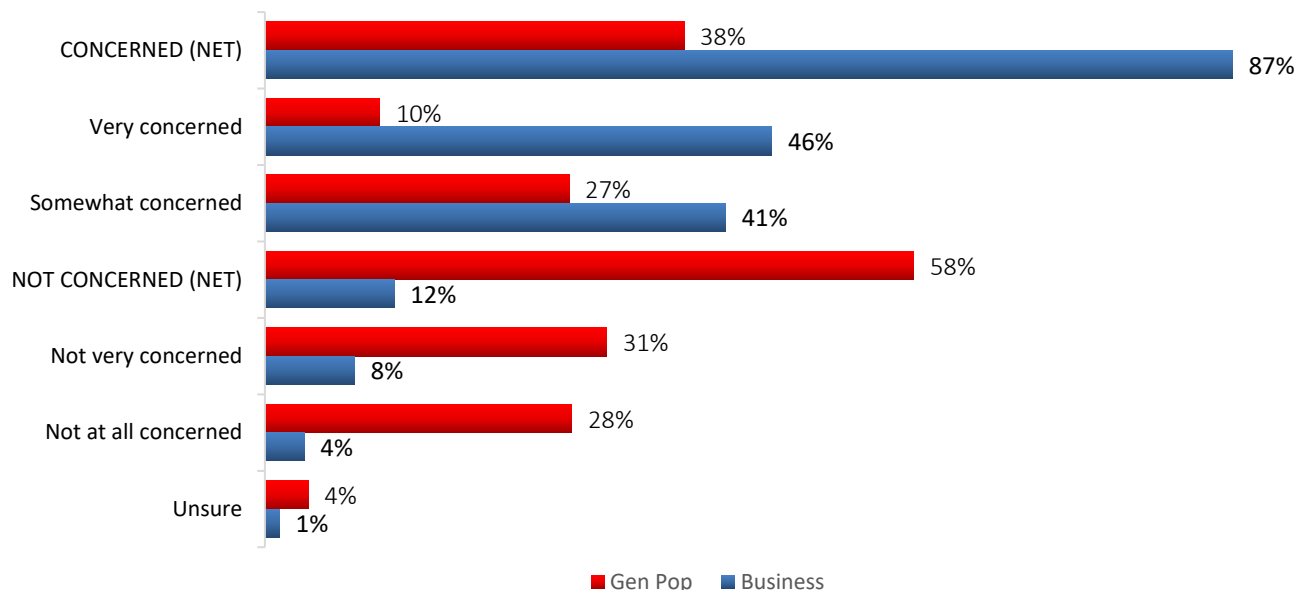
## COVID RESPONSE

- Throughout the past year, a significant proportion of businesses has faced hardships and challenges stemming from the pandemic situation. Almost three out of ten businesses (29%) report decreased customers and sales level, as well as labour issues.
- All issues surveyed have been mentioned by more or less one fourth of all respondents, including people and goods movement irregularities and increased costs and debt.
- A vast majority of businesses reports being concerned with the assistance programs coming to an end (87%). On the other hand, only about 4% of business declare not being concerned at all with the end of the assistance programs.
- The general population is less worried about this issue, as over half (58%) respondents are not very or not at all concerned, while around 2 out of 5 respondents are very or somewhat concerned (38%).
- It is also worth noting that a vast majority of the population as well as business is in favor of vaccine passport system (general population: 79%, businesses: 81%), the main perceived benefits among the general population being avoiding widespread lockdown (69%), ensuring the health and safety of workers (65%), and enabling consumers to participate in economic activities again (54%). International travel is mentioned by around one fourth of the surveyed populations (general population: 22%, businesses: 28%).
- Only a small minority of the general population (8%) and of businesses (13%) is not in favor of the proof of vaccination system to get access to non-essential services and activities.

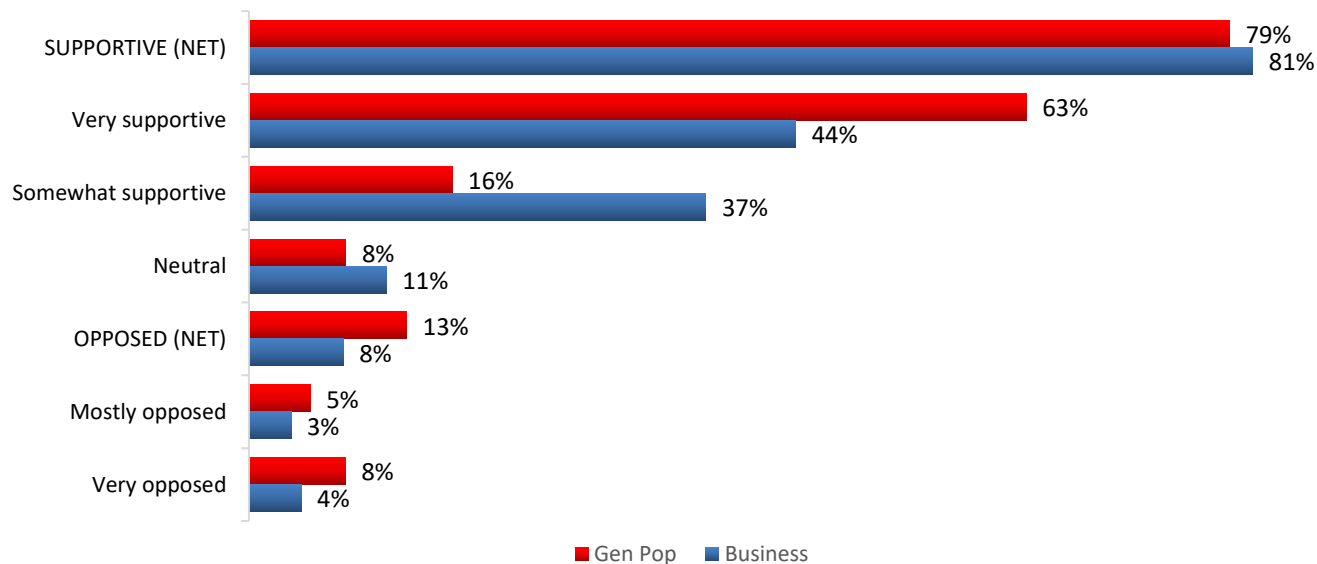
### What are the key challenges your business is facing as a result of COVID-19?



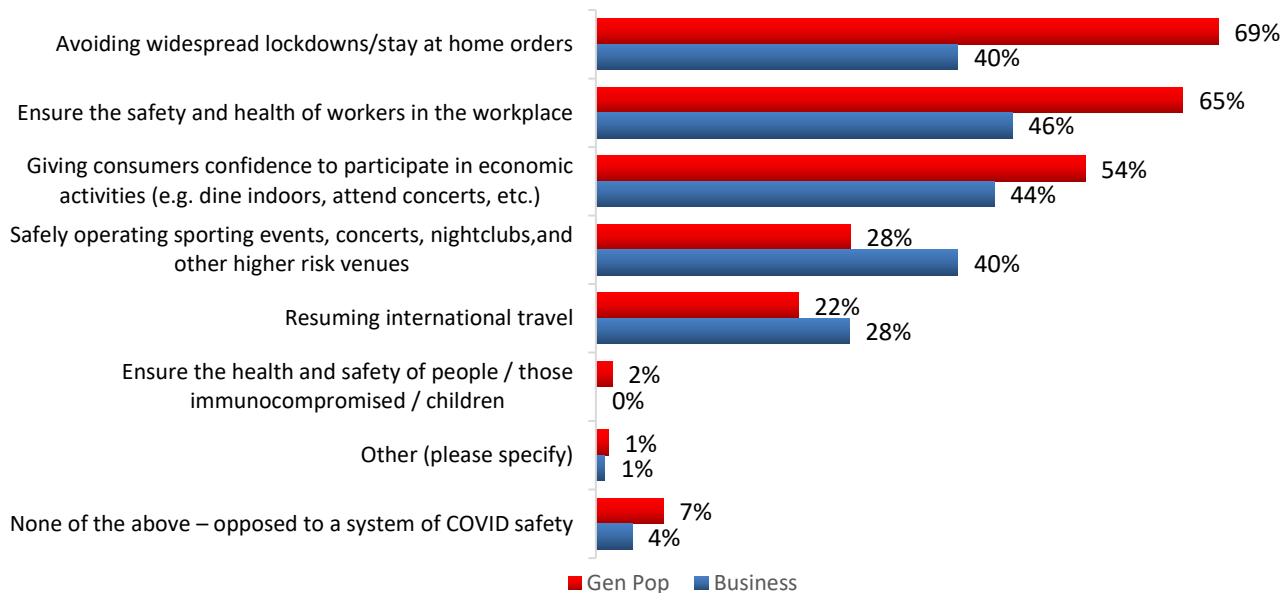
**To what degree are you concerned or not concerned about the Federal government COVID-19 assistance programs coming to an end?**



**With the threat of a fourth wave of COVID-19 in the fall, how supportive would you be of a system that requires Canadians to show proof of vaccination to access certain businesses or services, with exemptions and accommodations for those who cannot be vaccinated?**



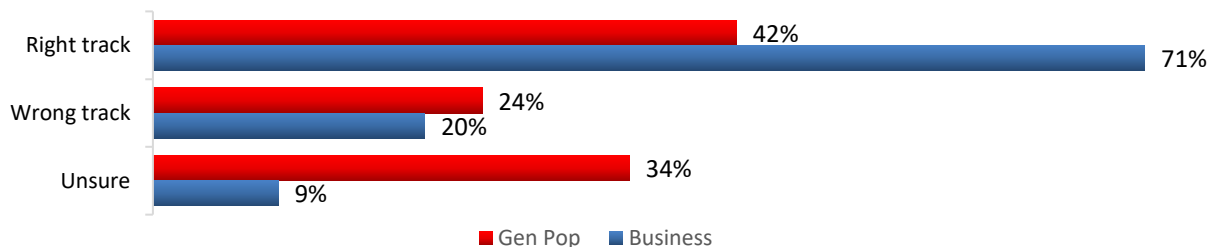
## What would you see as the primary benefits of a system of certifying COVID safety?



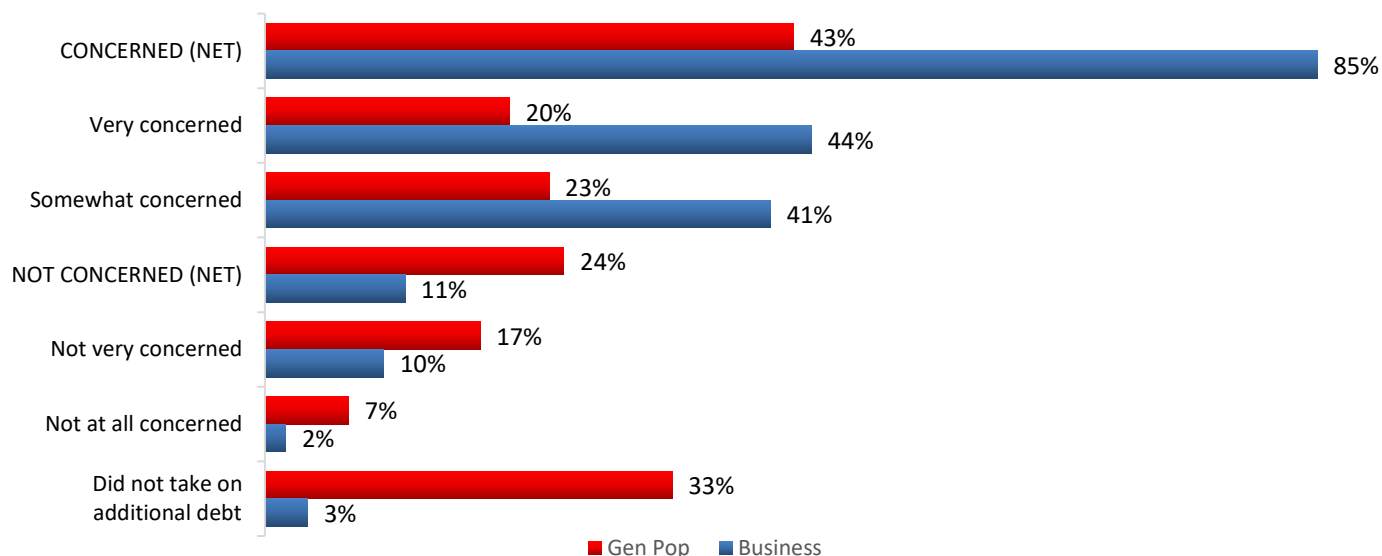
## ECONOMY

- Businesses seem more optimistic than the general population in regards of how the economic recovery is going: almost three quarters consider that the recovery is on the right track (71%), while around one fifth (20%) thinks the opposite. The general population is however more divided, as a third of respondents (34%) report being unsure of what to think, while over two fifths (42%) consider it to be on the right track, and a quarter on the wrong track (24%).
- Financially, businesses are far more worried of the impact of the covid-19 pandemic than the general population, as a vast majority of them declares being very or somewhat concerned (85%). However, a substantial proportion of the general population remains concerned by the debt they took in response to the pandemic (43%).
- The rising cost of goods and the tax burden stemming from increased federal debt are also deemed concerning issues among both populations, as a vast majority of respondents (be they businesses or not) reports being concerned.
- Even though the concern levels regarding the current financial situation are high, the respondents remain optimistic for the future, as a majority of businesses (44%) is confident their financial situation will improve, and a similar proportion (39%) considers that it will remain the same. The general population is less optimistic, as six out of ten individuals do not expect any improvement to their financial situation (58%), and a fifth foresees a worsening of their situation (21%).
- The outlook on financial stability also translates into peoples' expectations around their standards of living, as around half of businesses is expecting them to improve (51%), while less than a fifth of the general population agrees with the statement (17%). The general population is characterized by stronger levels of pessimism, as a third expects a stagnation in their standards of living (36%), and almost two fifths are expecting them to get worse (39%).

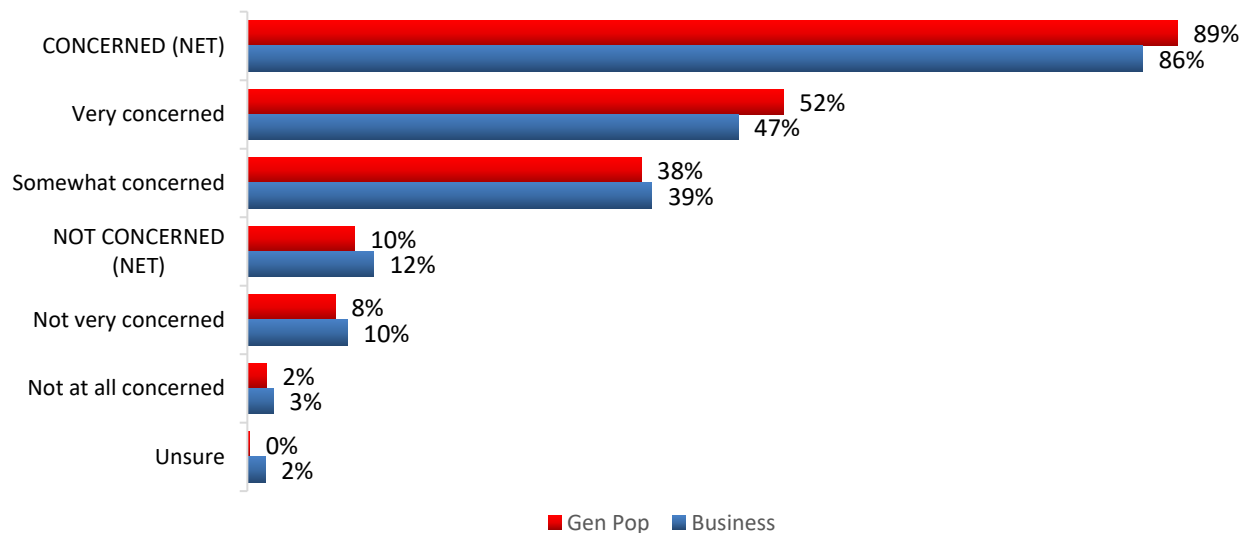
### Do you believe the Canadian economic recovery is on the right track or wrong track?



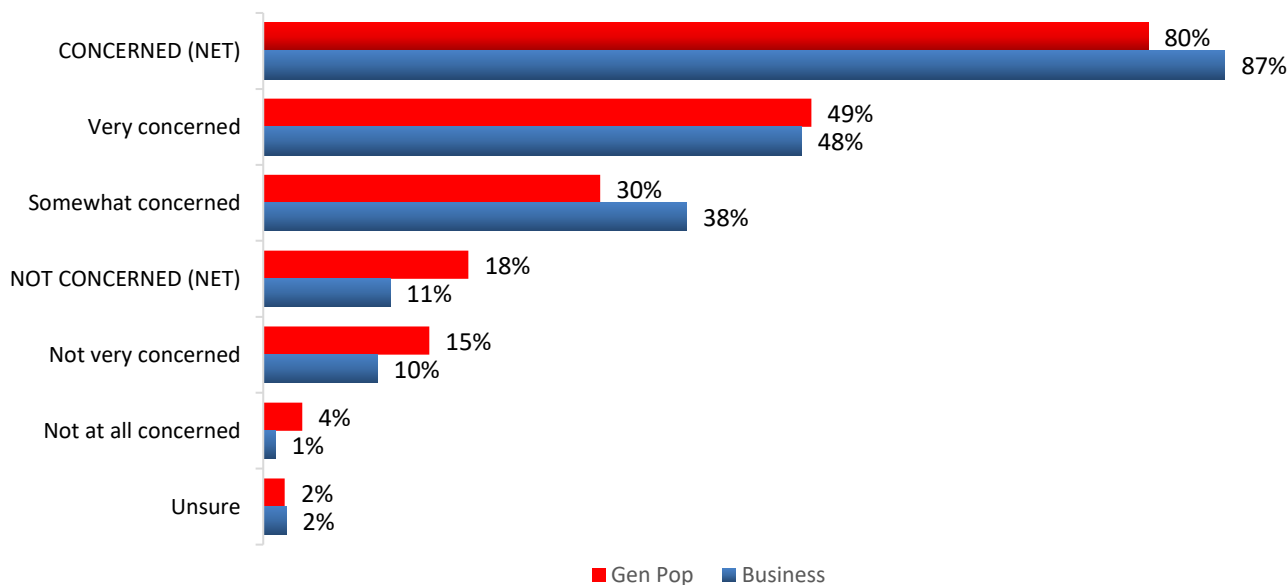
### To what degree are you concerned or not about the additional debt you/your businesses took on in response to the pandemic?



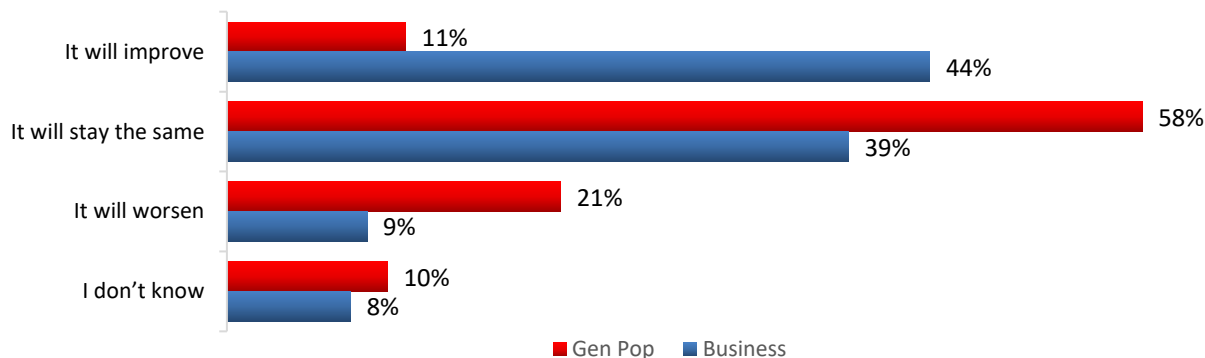
### To what degree are you concerned about the rising cost of goods?



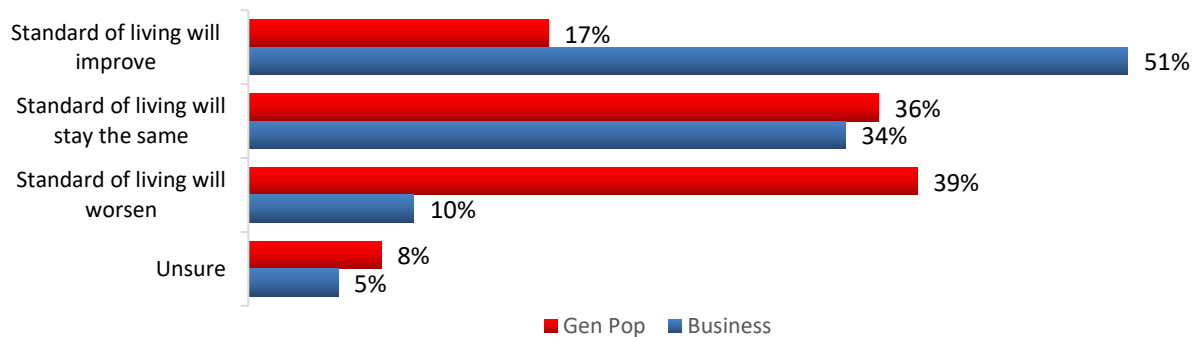
### To what degree are you concerned about the tax burden increasing in light of increased federal debt?



### How confident are you about your own/your business's financial security over the next year?



### How do you anticipate your standard of living will change over the next five years?





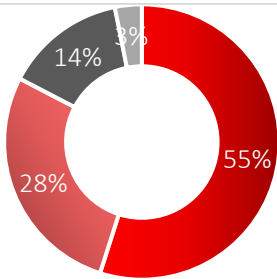
## ENVIRONMENT

- Both surveyed populations are on the same wavelength in regard to environmental concerns. For each surveyed aspect (climate change, supporting local low carbon innovation, and supports to businesses to address climate change), around half of the surveyed populations report wanting to see more focus. Ecological / environment issues therefore seem to be at the forefront of topics of concern.

### Would you like to see more focus, about the same or less focus on...

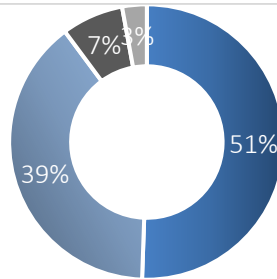
...climate change?

Gen Pop



More focus Same focus Less focus Unsure

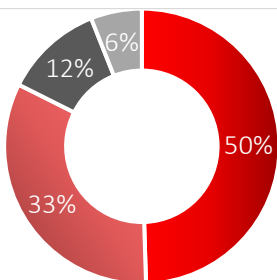
Business



More focus Same focus Less focus Unsure

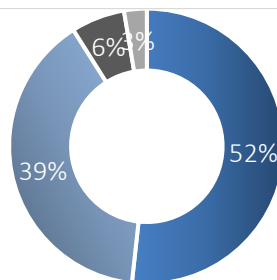
... supports provided to businesses and local clean technologies to address climate change?

Gen Pop



More focus Same focus Less focus Unsure

Business

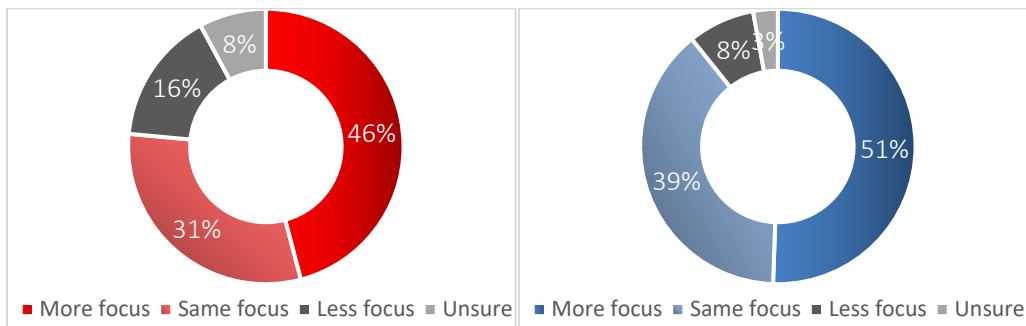


More focus Same focus Less focus Unsure

... supporting local low carbon innovation?

Gen Pop

Business



### AFFORDABILITY AND WORKFORCE

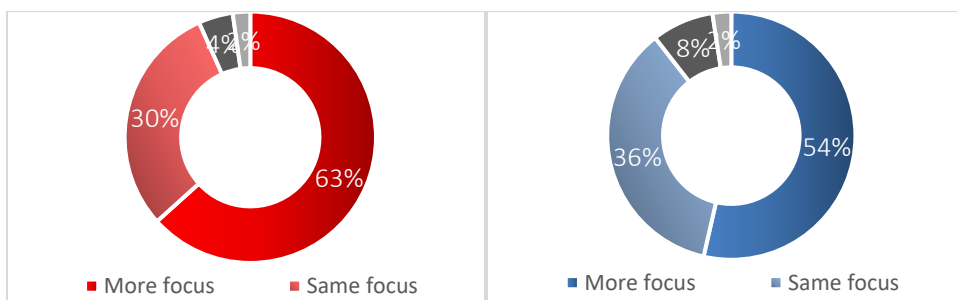
- Over half of businesses (54%) would like to see more focus on addressing housing affordability, while a third would like to see about the same focus (36%). The general population shows higher levels of concerns, as the proportion of respondents declaring wanting more focus jumps to 63%. About a fifth (18%) of them also declare having recently moved or considering moving due to the cost of housing.
- The pandemic seems to have dealt a hard blow to businesses, as a majority declares having faced issues in terms of: employee recruitment and retention (75%), and the ability to attract investment / do business due to changes in Canada’s regulatory environment (49%).
- A majority of businesses would also like to see the government deploy more efforts to boost the economy and support developing industries, as all surveyed measures have approval rates averaging 60%.
- Ottawa-specific measures are also backed by businesses, as around half would like the federal government to commit funding for phase 3 of Ottawa’s LRT (47%) and commit funding to for ByWard Market revitalization. Finally, over a third (36%) of businesses would like the government to commit funds for Lebreton Flats development.

### Would you like to see more focus, about the same or less focus on...

...addressing housing affordability?

Gen Pop

Business



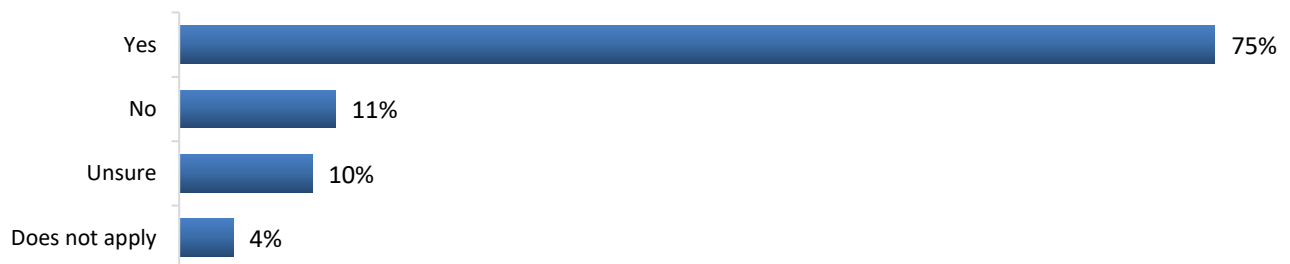
**Have you recently moved or are you considering leaving/moving due to the cost of housing?**



**Has your business's ability to recruit or retain employees been affected by affordability issues?**



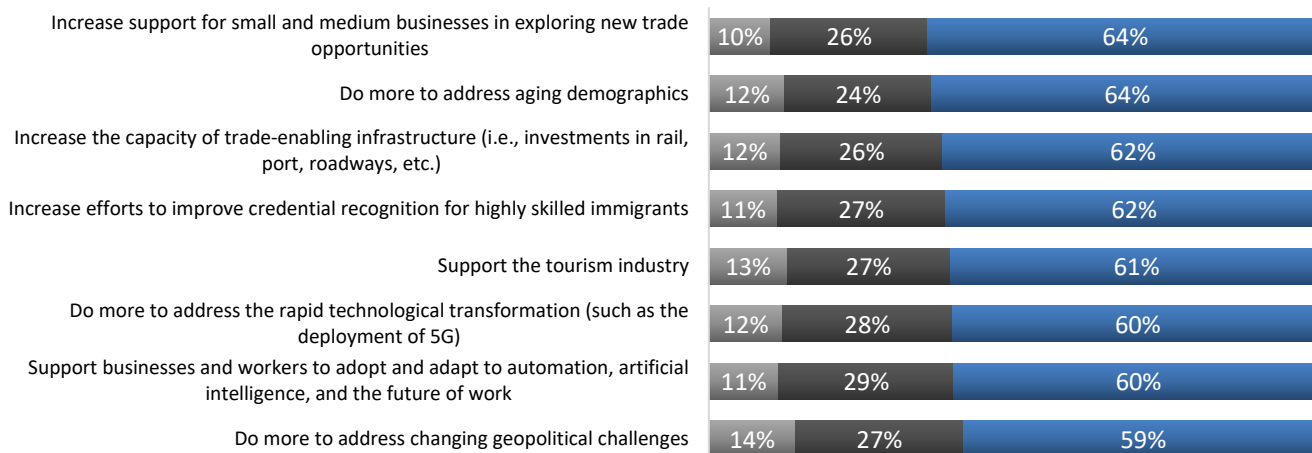
**Has your business experienced difficulties recruiting/hiring employees since the onset of the pandemic?**



**Compared to other jurisdictions, how have changes in Canada's regulatory environment over the past two years impacted our ability to attract investment or do business?**

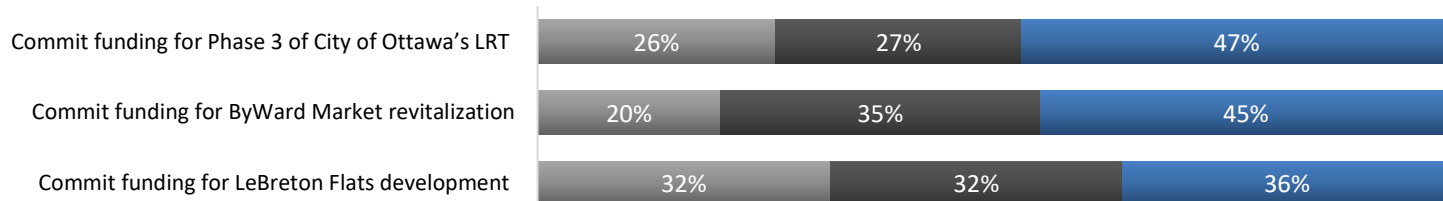


## Would you like to see the next Federal Government:



■ Unsure ■ No ■ Yes

## Ottawa:

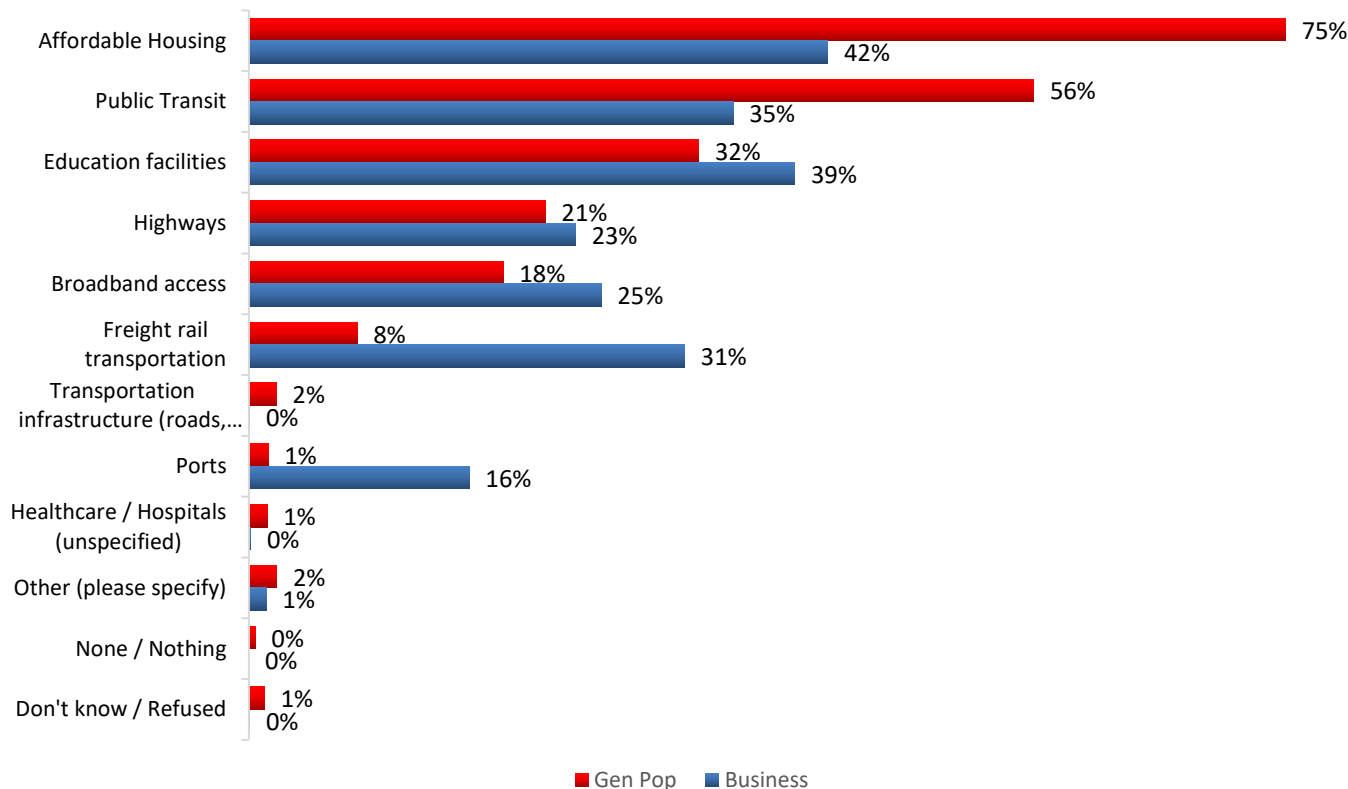


■ Unsure ■ No ■ Yes

## INFRASTRUCTURE

- Ottawa residents consider affordable housing to be the main pain point in their region, as is reported by three out of four respondents (75%). Public transit (56%) and education facilities (32%) take the second and third place of the list.
- While the priorities of businesses might differ from those of the general population, their top 3 pain points remain the same. The top concern remains affordable housing (42%), followed by education facilities (39%) as these directly affect workers' employability, and public transit (35%).

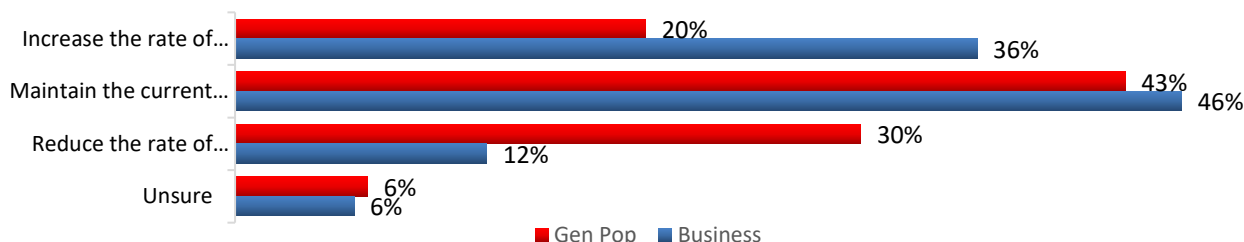
### As we emerge from the pandemic, what are the key infrastructure pain points in your region?



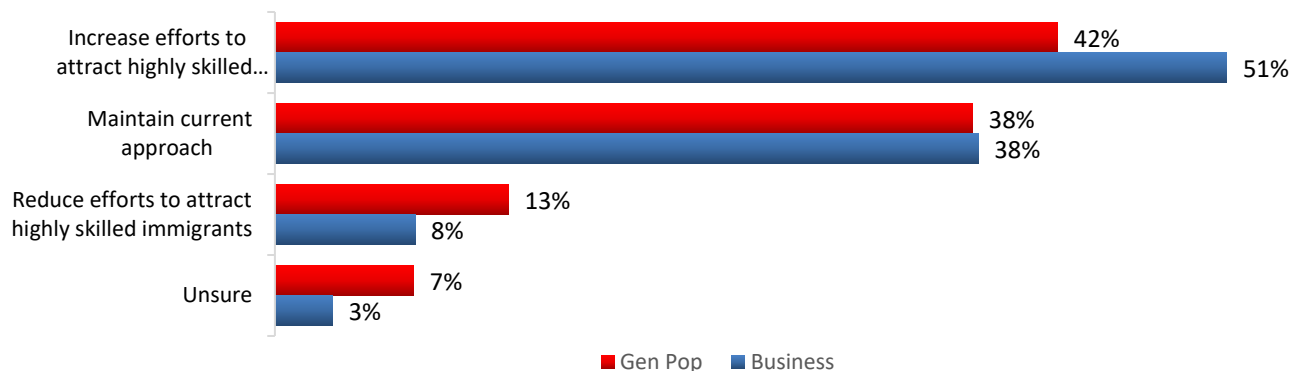
### IMMIGRATION

- The need for a bigger labor force particularly shows when looking at businesses position towards immigration policies, as over a third (36%) would like the next federal government to increase the rate of immigration, and two fifths (46%) would like them to maintain the current level. Only a tenth of businesses would like a reduced rate.
- This tendency is reversed when it comes to the general population, as there is a higher proportion in favor of reducing immigration (30%) than increasing it (20%). Again, around two fifths would like the current level to be maintained.
- There is less of a divide when it comes to highly skilled immigrants: around half of businesses think the federal government should increase efforts to attract them (51%), and around two fifths of the general population (42%). Another third of each population (38%) would like the current approach to be maintained, while one tenth of the general population would like the efforts to be reduced (13%).

### Do you believe the next Federal government should:



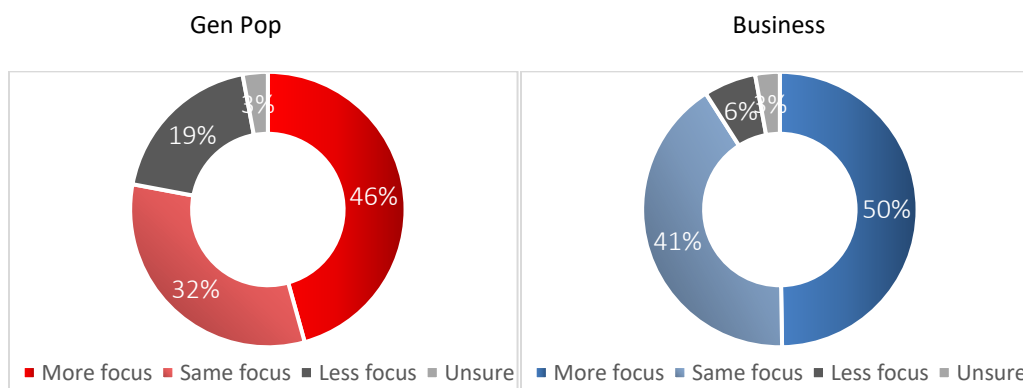
**Do you think the Federal Government should increase or decrease efforts in attracting and bringing highly skilled immigrants to Canada to address workforce needs?**



**INDIGENOUS RELATIONS**

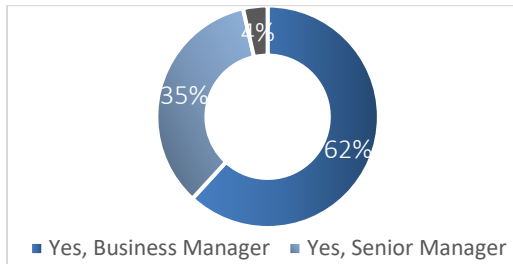
- According to the respondents, Indigenous reconciliation should earn more focus (general population: 46%, businesses: 50%).
- Around a fifth of the general population (19%) would like the issue to gain less focus, and this proportion is significantly lower among businesses (6%).

**Would you like to see the next Federal Government focus more/about the same/less on Indigenous reconciliation?**

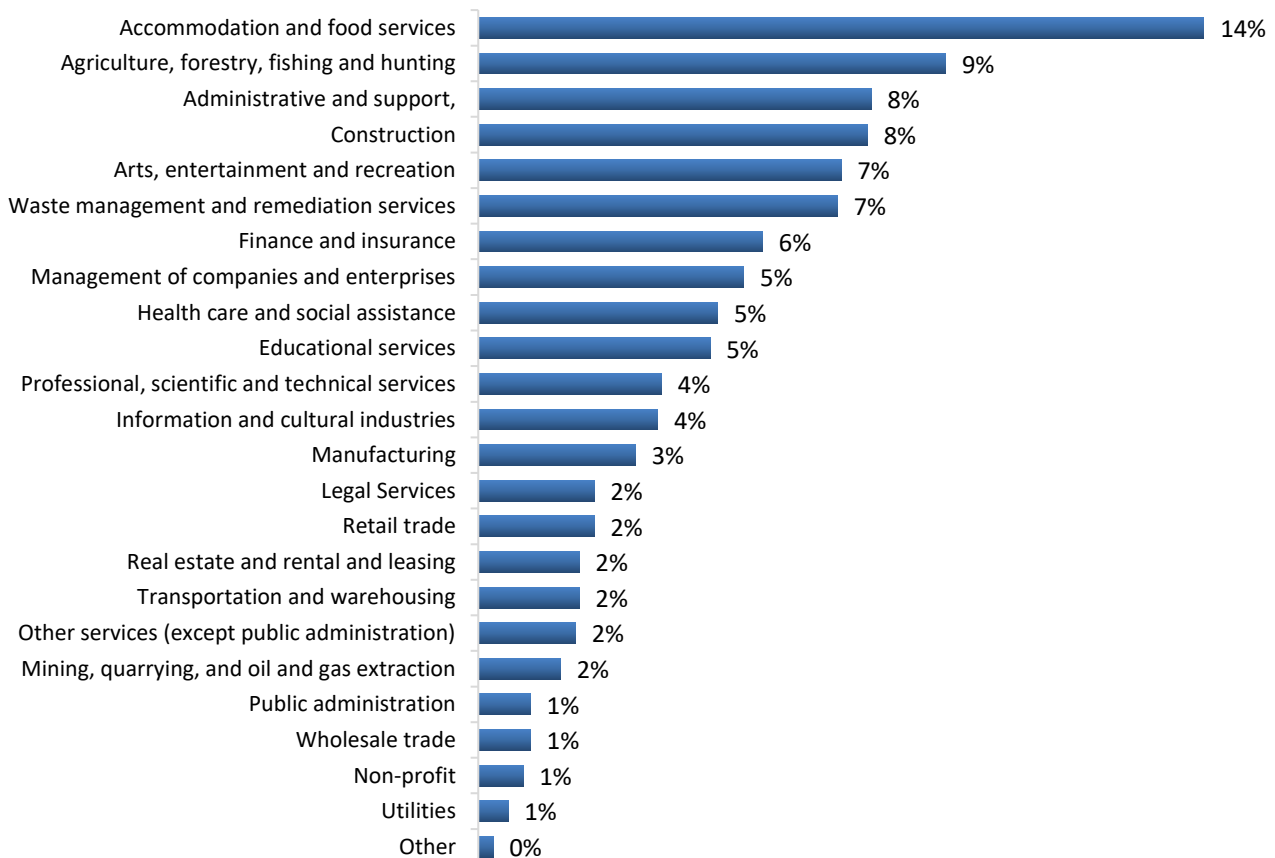


## DEMOGRAPHICS

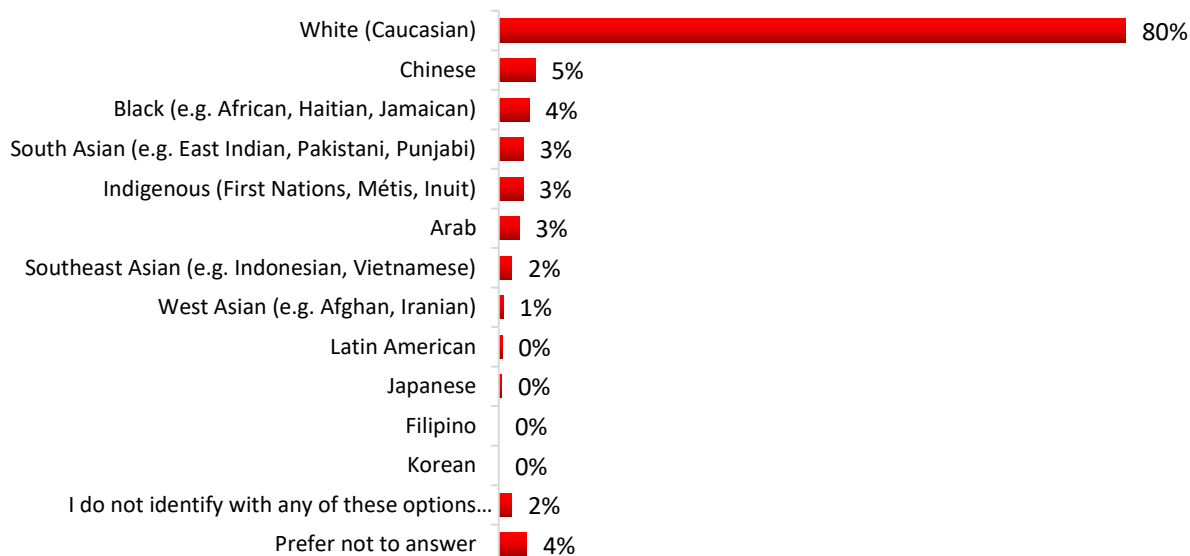
### Are you a business owner or senior manager?



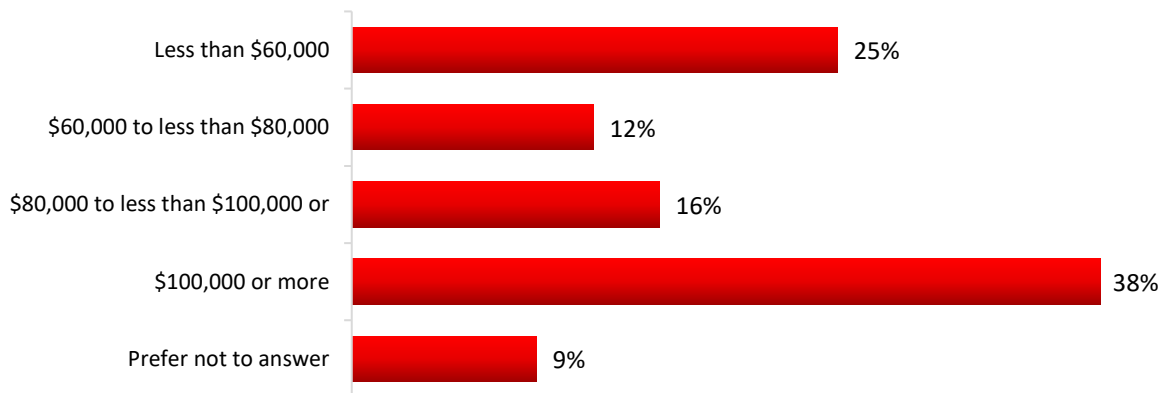
### What industry does your business/organization operate in?



**I would describe my ethnic or cultural background as (select all that apply):**



**Which of these broad ranges best describes your total annual household income before taxes?**



**What is the highest level of school/education that you have completed?**

