

Communication

Canada



Listening to Canadians

Communications Survey

Spring 2003

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Enquête sur les communications

Listening to Canadians

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Introduction

The mandate of Communication Canada is to improve communications between the Government of Canada and Canadians. In doing so, it provides corporate communications products and services, and supports the Government's commitment to a strong and united Canada.

Within this framework, Communication Canada carries out relevant research activities and shares results throughout the Government of Canada to increase understanding of societal trends, issues and events affecting government communications.

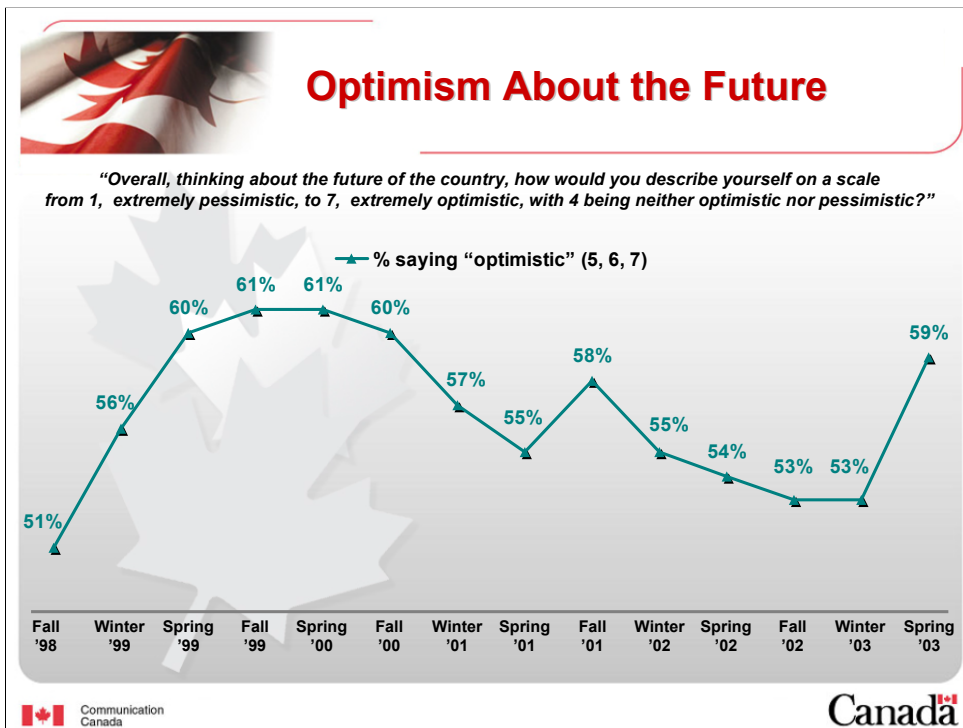
This report is based on the results of the spring 2003 *Listening to Canadians* survey and earlier tracking surveys. GPC Research conducted the spring survey between May 8 and 18, 2003. They interviewed 5006 adults across Canada. We continued our practice of periodic oversampling in the Atlantic region, this time focusing on New Brunswick and Nova Scotia.

The report will be made available on the Communication Canada Web site (www.communication.gc.ca).

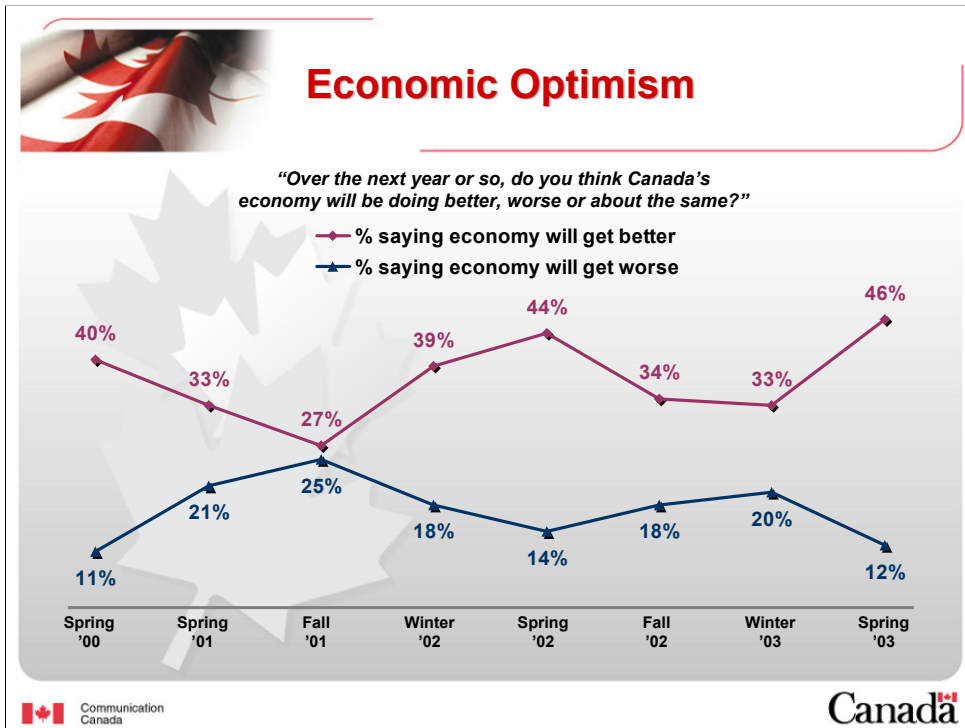
Executive Summary

The key findings of the spring 2003 *Listening to Canadians* survey are the following:

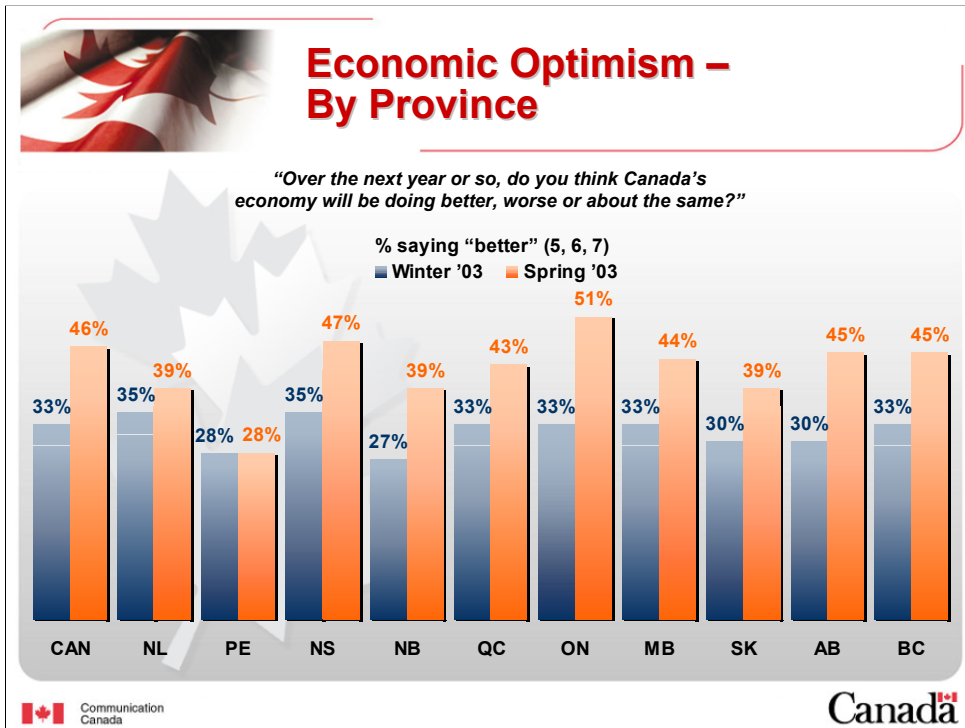
- Despite the recent war in Iraq, SARS and a slowing global economy, Canadians are optimistic about the future of the country. Economic optimism, in particular, is at a three-year high. Furthermore, this optimism, while strongest in Ontario, is evident in almost every province. This increase in optimism is most likely due, in part, to the soaring dollar, which hit a six-year high during the interviewing stage of this study.
- Canadians generally believe that the Government is focused on their top priorities – health care, the economy and unemployment.
- Canadians' evaluations of the Government's performance on a number of key policy issues have improved since winter 2003. In fact, the positive ratings on 14 of the 18 issues measured increased. Performance on managing the economy and health care were seen as key areas of improvement.
- The level of trust in the Government of Canada has increased five points since the winter. A large majority of Canadians have either a moderate or high level of trust. Moreover, ratings of elements of the Government's reputation have all improved. This improvement is consistent across the country but is particularly strong in Quebec.
- In this context, Canadians' overall perception of the Government has improved significantly. Performance ratings are particularly high in Atlantic Canada, Quebec and the country's large urban centres. Performance ratings in the West are lower, but ratings have improved in all of those provinces.



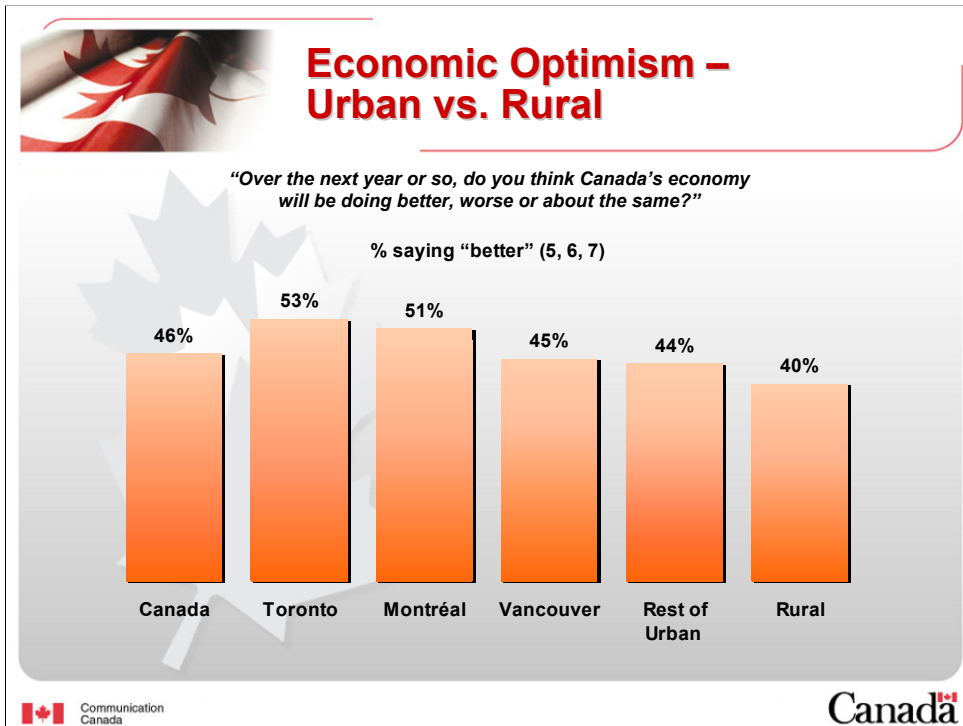
- Spring 2003 marks the first significant increase in overall optimism about the future of the country since the inception of the *Listening to Canadians* surveys. Nearly six in ten Canadians believe the future will be better. This level of optimism falls just short of the highest level of optimism, seen in the spring of 2000.
- Over the past five years optimism about the future of the country has been reasonably strong. Optimism peaked in late 1999 and early 2000 as the stock market regularly closed at record-breaking highs and new well-paying high-tech jobs were being created faster than they could be filled.
- Optimism slipped slightly with the emergence of a bear market in the second half of 2000. Canadian confidence about the future continued to decline as the global economy declined, unemployment rose, anti-globalization movements grew in strength, and the September 11 terrorist attacks on the United States occurred.
- However, this slip in optimism was moderate. A majority of Canadians were still optimistic despite all these negative trends and events.
- The cause for the sudden increase in overall optimism this spring is most likely attributable to the even greater increase in economic optimism.



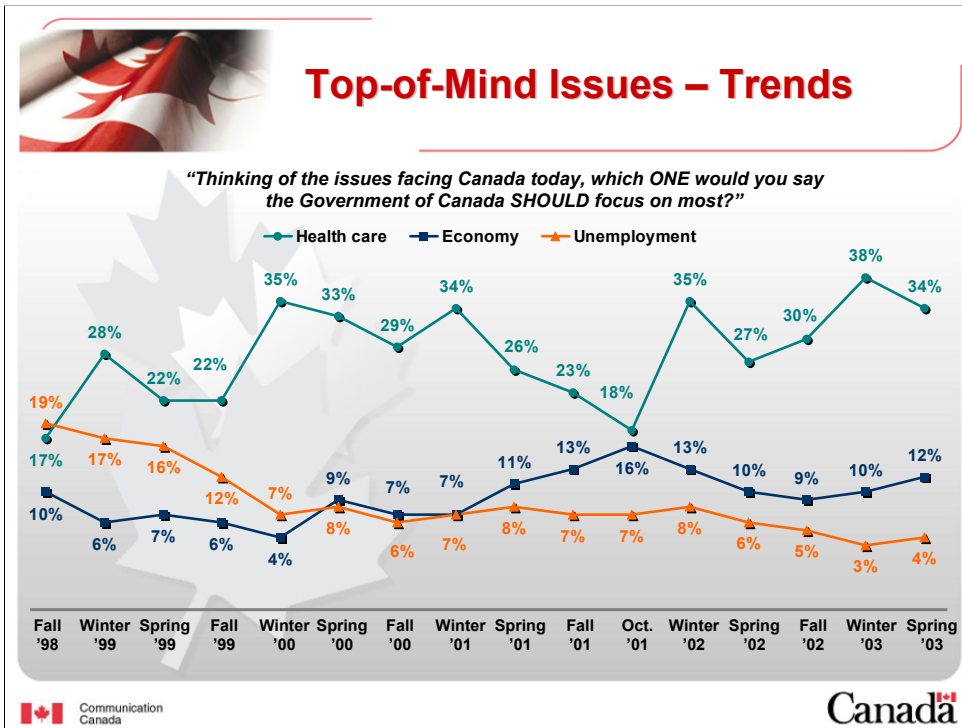
- With the end of the war in Iraq and the skyrocketing dollar, which reached a six-year high during the interviewing stage of this survey, economic optimism is at its highest point since the beginning of the *Listening to Canadians* surveys.
- Economic optimism, like overall optimism, declined following the beginning of the bear market in the spring of 2000, hitting a low of 27% saying the economy would improve just before and after the September 11 attack.
- Unlike the trend in overall optimism, economic optimism has oscillated over the last two years, increasing with the housing boom and declining with the approach of the war in Iraq.



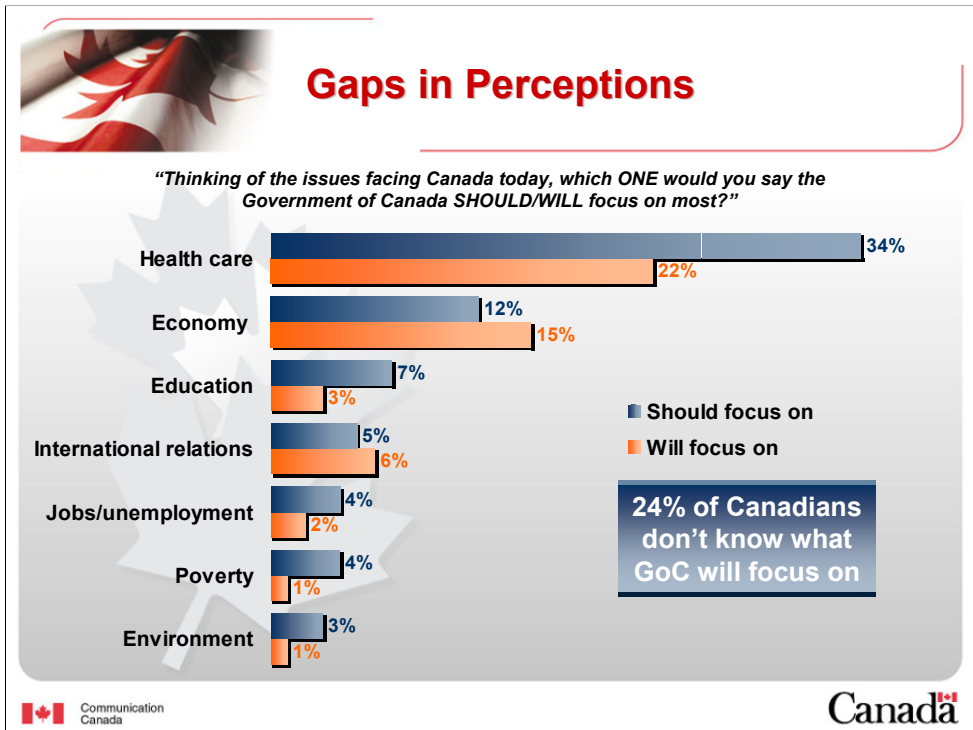
- Currently, economic optimism has increased in every province with the exception of P.E.I., where it has remained unchanged since winter 2003. Problems with the fisheries and the potential impact this may have on tourism may help to explain this situation. Crab quotas were cut, the lobster stock has decreased by 50%, and 50%–80% of the oysters have died. Furthermore, the cod moratorium could be seen as adversely affecting the recreational cod fishery and, by extension, U.S. and domestic tourism.
- Economic optimism is highest in Ontario where one in two Ontarians feel the economy will improve. This represents an 18-point increase since the winter. Economic optimism in Ontario could be due, in part, to the fact that the province’s economy has grown faster than that of the rest of Canada over the past six years. Moreover, 71,000 new jobs have been created in the first quarter of 2003.
- Optimism in Western Canada has also increased significantly. This is especially true in Alberta. However, interviewing was completed before the discovery of Canada’s first case of mad cow disease. As a result, economic optimism in Alberta may have declined since then.



- A closer look at economic optimism reveals that the highest levels of optimism seem to be concentrated in Canada’s big cities, especially Toronto and Montréal.
- Despite the initial SARS (severe acute respiratory syndrome) outbreak, more than half of Torontonians believe the economy will improve. This is especially true for men in Toronto, 61% of whom are optimistic. Just over one in two Montrealers are also optimistic.
- Economic optimism, while still quite high in Vancouver, is slightly lower than it is in the country as a whole. Other urban residents hold similar opinions.
- Canada’s rural residents are less likely than are their urban counterparts to express optimism.



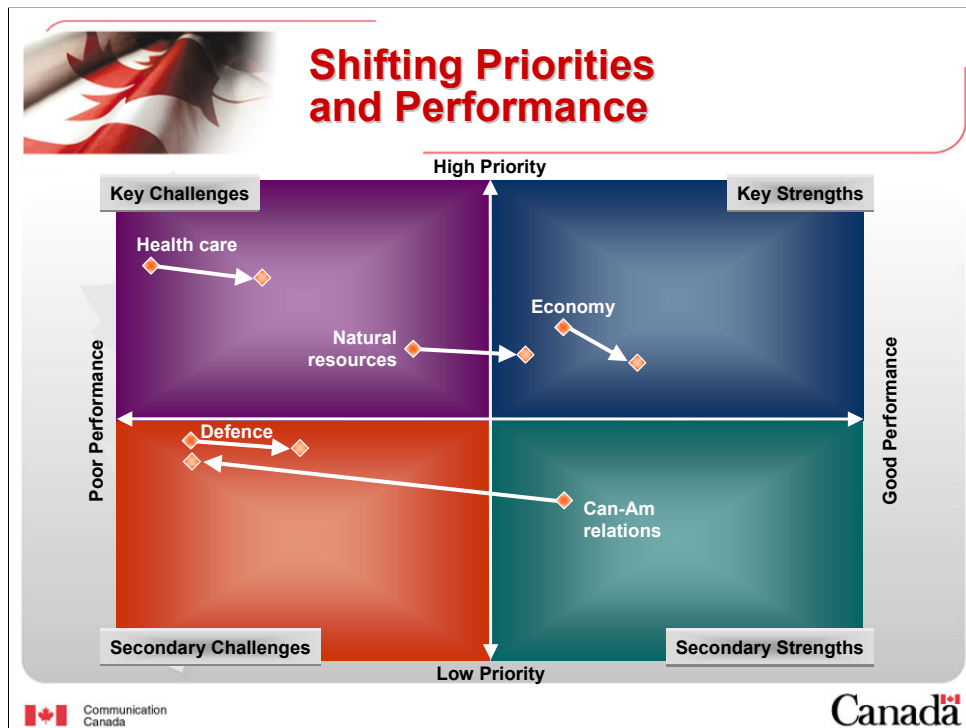
- The top-of-mind concerns for Canadians have oscillated over time. Employment was the dominant issue during the 1990s. As the economy strengthened, however, Canadians turned their attention to the health care system.
- Since 1999, health care has been the dominant top-of-mind concern for Canadians. Over the last year this dominance has increased, with nearly three times the number of Canadians focused on health care as compared to the economy, which is the next biggest issue. Over the last five years, concern about the health care system has spiked during the winter months. This may be due to a seasonal effect with more Canadians being sick more often and making greater use of the health care system in the winter months.
- Concern about the economy steadily increased as a top-of-mind issue after the stock market crash in the spring of 2000. Concern peaked just after September 11, 2001, when it was mentioned by 16% of the population. However, economic worries have abated.



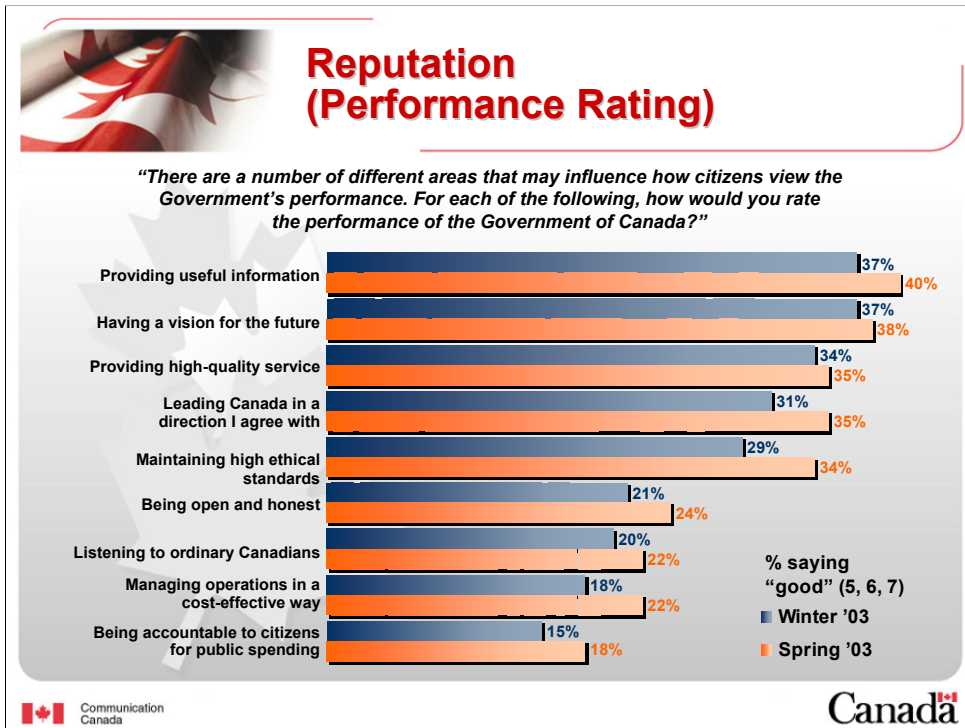
- From a communications perspective it is important to understand the gaps between what Canadians feel the Government of Canada should focus on most and what they think it will focus on.
- Health care is the number one top-of-mind priority for more than one-third of Canadians. Moreover, it ranks as the highest priority in every province. Likewise, health care is seen as the number one issue the Government of Canada will focus on. This is true in every province except British Columbia, where it ranks second.
- Despite this apparent continuity, however, there remains a 12-point gap between those who say the Government of Canada should focus on health care (34%) and those who think it will actually do so (22%).
- There is also a smaller gap on key social issues (i.e. education, poverty and the environment).
- More Canadians feel the Government will focus on the economy or international relations than feel it should focus on these issues. Nevertheless, these differences are marginal.
- Some of these gaps are due to the fact that nearly one in four Canadians (24%) say they are not sure what the Government will focus on.



- Mapping Canadians' perceptions of, on the one hand, policy priorities and, on the other, how well the Government is performing on these same issues provides insight into the Government's communication strengths and challenges. As is the case with top-of-mind priorities, health care is seen as the number one prompted priority area for Canadians. A majority, 92%, believe that health care should be the top priority for the Government. It is also seen as an area where the Government could improve its performance. Child poverty is another key challenge. In fact, of all the priority areas measured in the winter, the Government received the lowest performance rating on this issue. The performance rating has improved somewhat this spring.
- Since the beginning of the *Listening to Canadians* survey, management of the economy has been, according to Canadians, the Government's greatest strength. More recently, the environment has emerged as a strength for the Government. Job skills and national security remain strengths but Canadians are less concerned with these issues than they used to be.
- Canadians see the Government performing well on employment, promoting innovation and representing Canada internationally. At the same time, however, they do not see these issues as high priorities. Last fall, infrastructure was seen as a secondary strength. Since then, in the minds of Canadians, it has increased as a priority as its performance rating has declined.



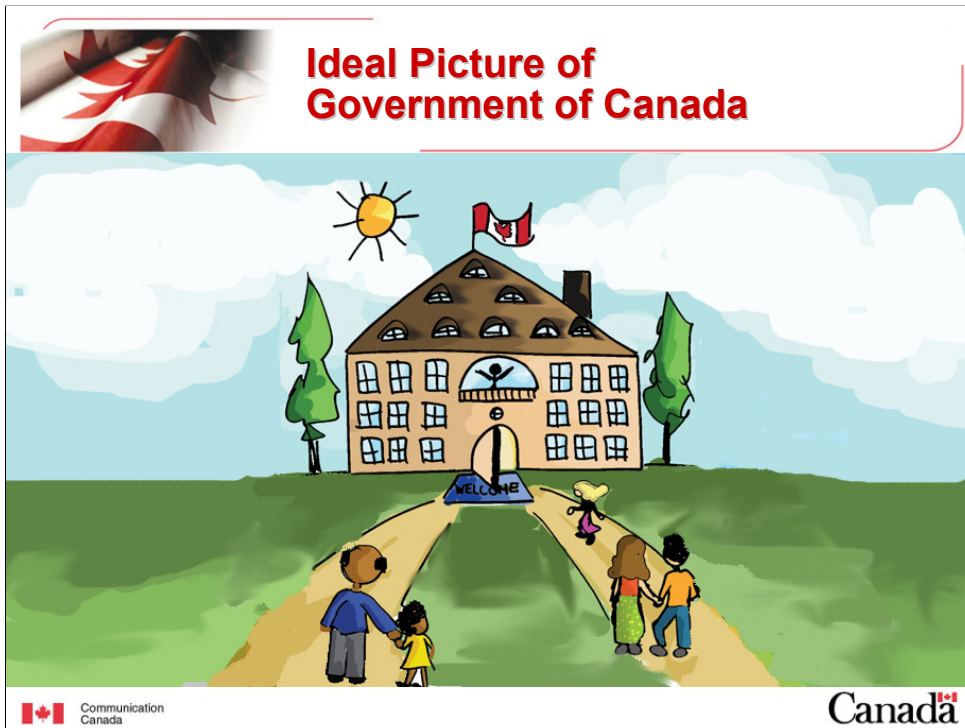
- Overall, ratings of the Government’s performance on 14 of the 18 policy areas measured improved between our winter and spring 2003 surveys.
- Performance ratings on economic management increased by five points, from 39% to 44%.
- Some of the other key shifts include:
 - managing our natural resources (up six points to 36%);
 - health care (up three points to 31%);
 - defence (up three points to 30%).
- The key exception is managing the Canadian-American relationship, which dropped nine points (from 36% to 27%).



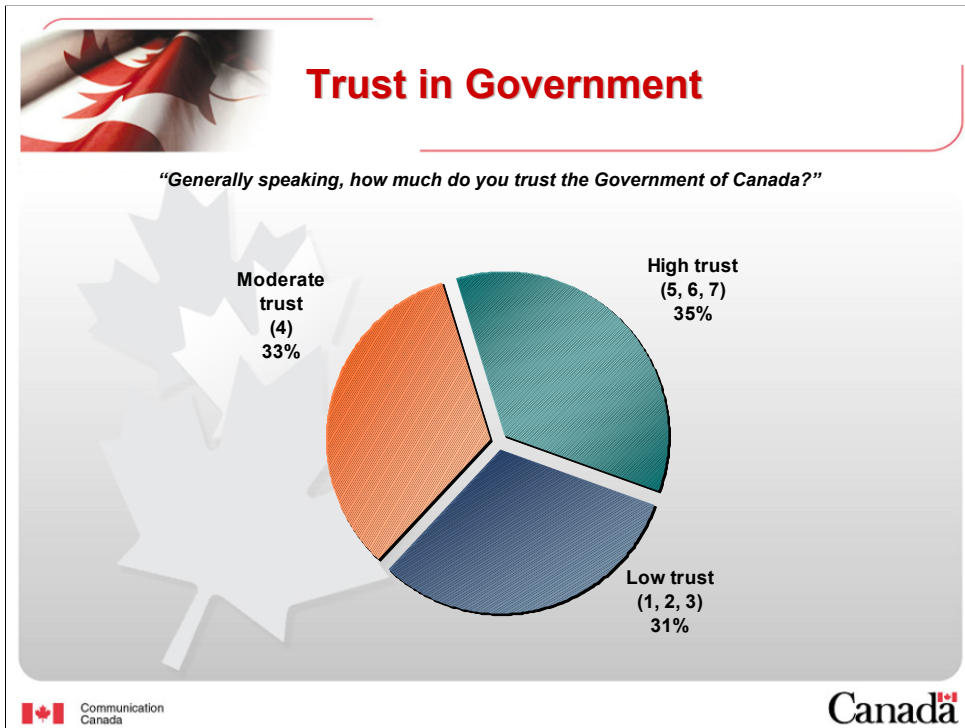
- For the first time since the beginning of the Listening to Canadians surveys, performance ratings on all reputation factors have improved. One of the key improvements was in maintaining high ethical standards. This indicator increased five points, to 34% saying “good” from 29% in the winter.
- Performance ratings also rose significantly on cost-effective management and leadership. Both of these indicators increased four points.
- This general improvement occurred in every province.
- However, the performance ratings on being open and honest, listening to Canadians, cost-effective management and accountability for spending remain generally low.



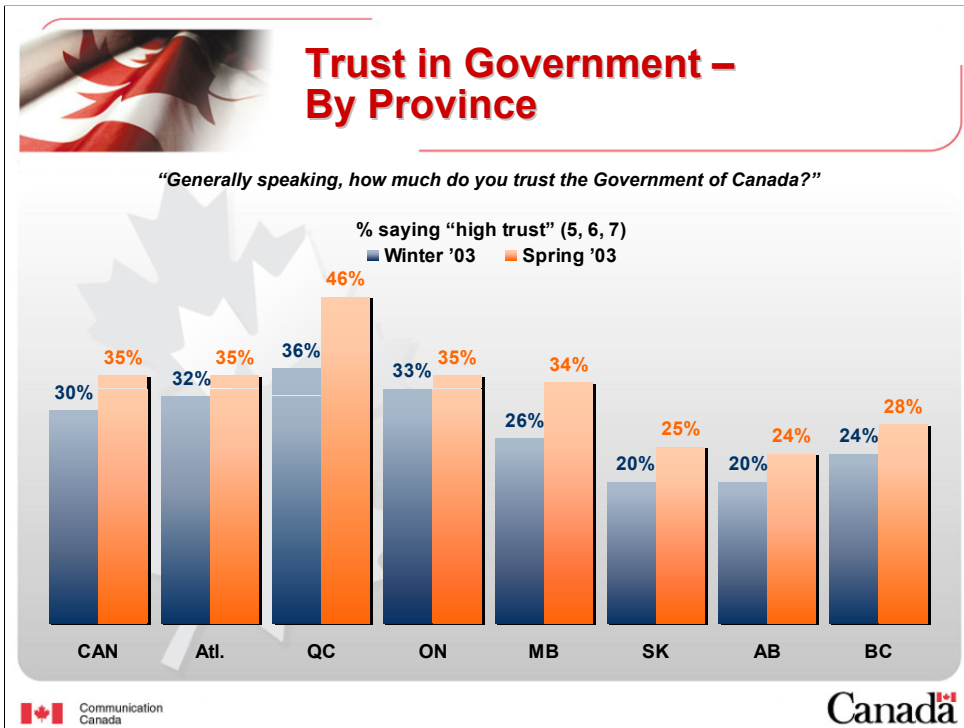
- Focus groups were held in an effort to better understand these perceptions of the Government of Canada's reputation. The participants were asked to complete a series of exercises designed to draw out and focus participants' image of the Government. Despite the fact that focus group results cannot be applied to the entire population, they are useful in that they provide insight into the quantitative findings.
- The participants were asked to imagine, and then to draw, the Government of Canada as a house. After discussing their individual drawings, participants then drew another house representing the Government of Canada as they would like it to be.
- Examination of the drawings from focus groups held across the country last fall and this winter reveals some common themes. One was a feeling of disconnect or lack of transparency. Many of the first drawings (those representing how participants currently see the Government) depicted houses with closed doors and without windows or with shut windows. Some houses were depicted as a fortress with gates, moats and walls. Participants indicated that they perceived the Government as closed off and, as a result, unaware of what Canadians want. Moreover, participants felt Canadians were unable to see what the Government was doing, indicating a desire for greater transparency. Another image was waste. Many houses had the smoke of burning tax dollars rising from the chimneys. Some drawings depicted the Government as a house with isolated rooms, indicating a perceived lack of communication within the Government itself.



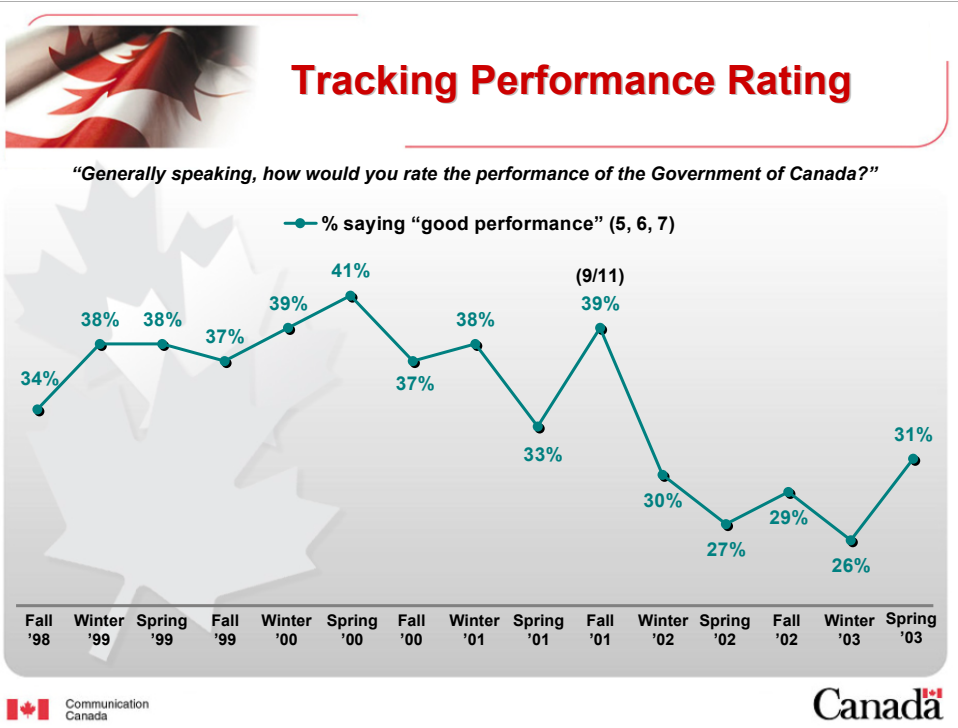
- Second drawings, of how they would like the Government to be, show that Canadians want a government that is more open and accessible. Very few focus group participants altered the overall structure in their second drawings from the original house they had drawn. Some simply added more windows and open doors, and welcome mats outside the front door. The houses appeared more stable and were surrounded by people. Moats had bridges across them and all sentries had gone. Essentially, participants were looking to the Government to become more attentive, more inclusive, more transparent, and less wasteful.



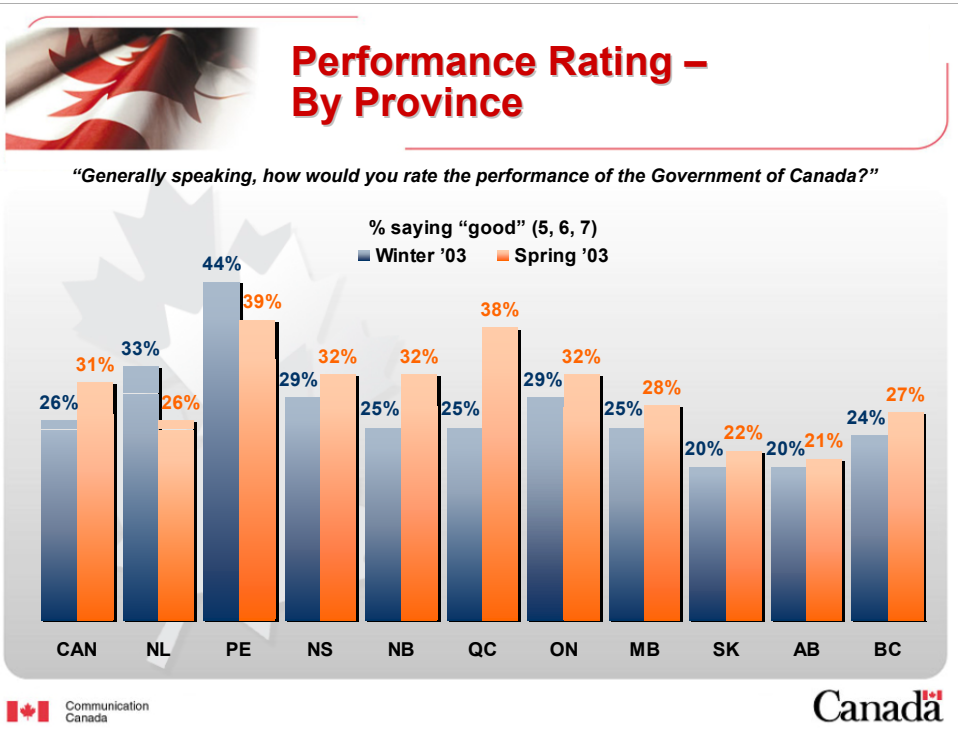
- A strong majority of Canadians still trust the Government. Thirty-five per cent of Canadians have a high degree of trust in the Government of Canada. Another 33% say they moderately trust the Government.
- Preliminary analysis indicates two distinct aspects of trust in Government. The first is reputation. That is, the more Canadians see the Government of Canada as being open and honest, as listening to their concerns and maintaining high ethical standards, the greater the level of trust will be. The second aspect is trust in the Government’s ability to solve the big problems of the day.



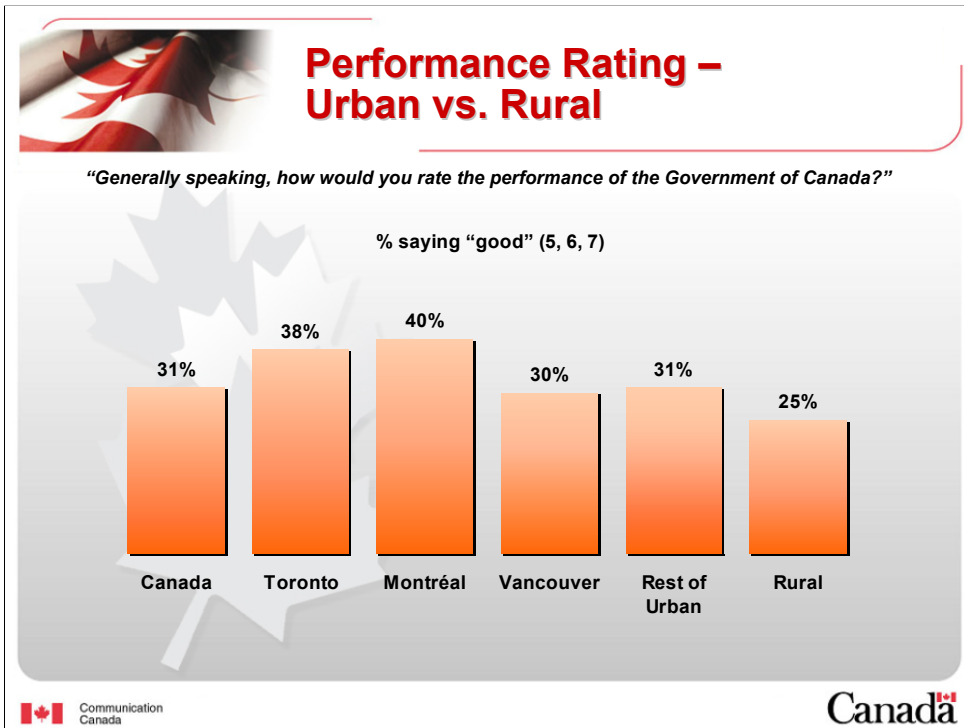
- Trust in Government increased in all parts of the country from Atlantic Canada to British Columbia. Trust is highest in Quebec. Nearly one in two Quebecers have a high level of trust in the Government of Canada. This represents a 10% increase since the winter.
- The level of trust in the Government increased in Western Canada as well. While these increases are more modest than that in Quebec, they are nevertheless significant.
- There were only slight increases in trust in Ontario and Atlantic Canada. However, residents of these provinces are second only to Quebec in their overall level of trust in the Government of Canada.



- As is the case with economic optimism and the other performance indicators, the overall performance rating of the Government of Canada also increased. Thirty-one per cent of Canadians feel the Government is performing well. This is a five-point increase since the winter.



- Performance ratings improved in almost every province. The highest increase was in Quebec, where 38% gave the Government a good performance rating. This represents a 13% increase since the winter. More important, however, it signals a significant shift: for the past few years Quebecers have been mainly neutral on Government performance ratings.



- Further analysis shows that positive performance ratings for the Government of Canada are highest in the two biggest cities in Canada – Montréal (40%) and Toronto (38%).
- Ratings in Vancouver are slightly lower than the national average but significantly higher than in the rest of B.C. and the West in general.
- Performance ratings in rural Canada are lower than in urban areas.

Summary Conclusions

Since the winter 2003 survey, nearly all indicators of optimism, reputation, trust and performance have improved. Some of these indicators have reached all-time highs since the outset of the *Listening to Canadians* tracking surveys. These positive results are particularly striking in the current context of the recent war in Iraq, a slowing of the global economy and the impact of the initial SARS outbreak in Toronto.

A second outbreak of SARS in Toronto, BSE (bovine spongiform encephalopathy) and the potential impact of the West Nile virus are occupying the minds of Canadians. Furthermore, the possibility that the economy might not grow as much as expected could dampen general economic optimism. The challenge then, is to continue to effectively communicate the Government of Canada's policies, programs and services in the current context of volatility.

For more information, please contact the Research Branch at (613) 992-6906.

The Survey (spring 2003)

- Total sample: 5006 adults aged 18 and over
- Telephone interviews conducted by GPC Research between May 8th and May 18th, 2003.

Total Interviews by GPC Research

	Number of interviews conducted	Maximum margin of error
Atlantic	1100	+/-2.95%
Newfoundland and Labrador	150	+/-8.00%
Prince Edward Island	150	+/-8.00%
Nova Scotia	400	+/-4.90%
New Brunswick	400	+/-4.90%
Quebec	901	+/-3.26%
Montreal	300	+/-5.66%
Ontario	1201	+/-2.83%
Toronto	399	+/-4.91%
West	1804	+/-2.31%
Manitoba	400	+/-4.90%
Saskatchewan	400	+/-4.90%
Alberta	401	+/-4.89%
British Columbia	603	+/-3.99%
Vancouver	298	+/-5.68%
Total	5006	+/-1.38%

