

Listening to Canadians

Communications Survey

Fall 2001



Communication
Canada

Canada

Communications Survey



Enquête sur les communications

Listening to Canadians

Communications Survey

Fall 2001

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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 offers corporate communications products and services and supports the Government's commitment to a strong and united Canada.

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

This report comprises the results of our fall 2001 communications survey. Ipsos-Reid and GPC Research conducted the survey. They were in the field immediately before September 11, suspended interviewing following the terrorist attacks and resumed two days later. The situation having evolved, we did a small follow-up survey between October 11 and 14. This report, therefore, provides a look at public opinion on both the Government's domestic agenda and international issues.

Executive Summary

Public opinion of the overall performance of the Government has fluctuated since the spring but remains positive.

A high proportion of Canadians also have a positive attitude toward the Government in general. Factors that contribute to a positive impression of the Government include favourable perceptions of the Government's leadership, its management of the economy, and its delivery of service and information to the public. Factors that detract include negative perceptions of listening to Canadians, cost-effective management and accountability.

When Canadians are asked about top-of-mind issues facing the country, the September and October results show a dramatic change. While national security and terrorism has emerged as a top-ranking concern, the number of Canadians who mention health care has declined steadily. The economy and unemployment are also re-emerging as major longer-term concerns.

When Canadians are asked to rate the major longer-term priorities facing the country, health care and education continue to occupy the highest rung. These are followed by the economy, children's issues and crime and justice.

Among the domestic issues, Canadians continue to give the Government a moderately good evaluation for managing the economy, Canadian unity and innovation. Performance evaluation for the social issues tends to be more mid-range, with the exception of health care, which is lower. The Government also gets a moderately low evaluation on unemployment and taxation.

On the international agenda, Canadians' assessments of the Government's performance vary widely. While the Government's ratings for handling relations with the U.S. and other countries and international development programs are higher than those for any issue measured by the Communication Canada survey, the ratings for national defence and immigration are currently lower. The evaluation for protecting national security is moderately positive.

Canadians believe that television, followed by daily newspapers and then radio, is the medium with the greatest influence on their impressions of the Government of Canada. The influence of these media varies within the population, however. For instance, television appears to have a relatively greater impact among young adults, while daily newspapers have more impact among people with university education.

Mood of the Country

“Generally speaking, how would you rate the performance of the Government of Canada? Please use a 7-point scale where 1 is terrible, 7 is excellent and the mid-point 4 is neither good nor bad.”

% saying good performance (5, 6, 7)

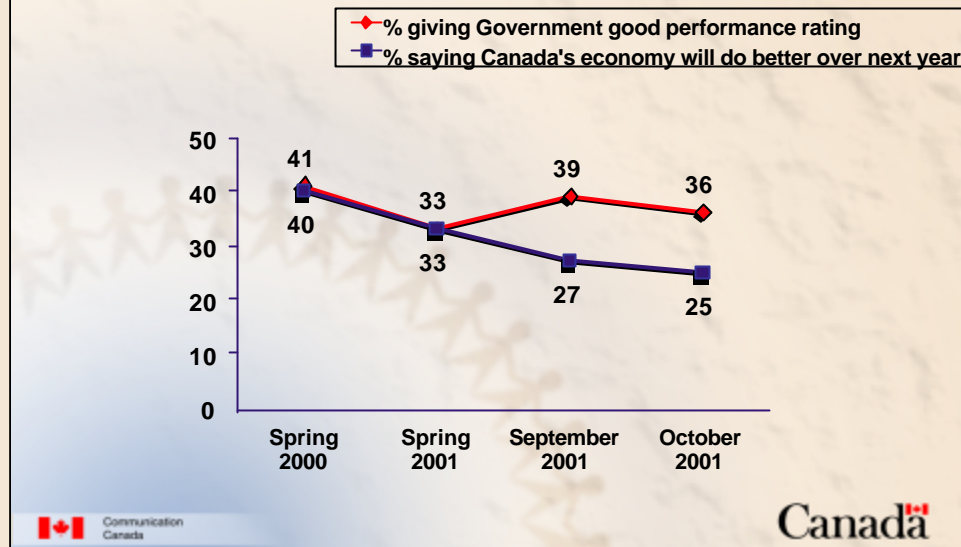
	September 2001	October 2001
Canada	39	36
BC	37	26
AB	35	37
SK/MB	32	38
ON	43	38
QC	36	36
ATL	45	41

“Over the next year or so, do you think Canada’s economy will be doing better, worse or about the same? Please respond using a 7-point scale where 1 is much worse, 7 is much better and the mid-point 4 is about the same”.

% saying better (5, 6, 7)

	September 2001	October 2001
Canada	27	25
BC	26	24
AB	30	21
SK/MB	26	22
ON	29	27
QC	24	22
ATL	33	38

Mood of the Country



- Economic optimism continues the decline that began 18 months ago.
- It has dropped eight points since spring 2001, from 33% to 25%.
- By contrast, public opinion of the Government's performance increased six points in September, from 33% to 39%.
- Since then, it has slipped three points, from 39% to 36%.

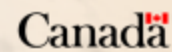
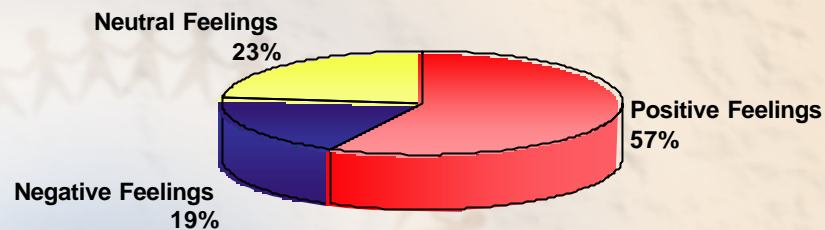
Feelings Toward Government of Canada

"I would like to know if your feelings toward the Government of Canada are for the most part positive or for the most part negative. Please use a 7-point scale where 1 means very negative feelings, 7 means very positive feelings, and 4 means neither positive nor negative feelings."

	% negative (1, 2, 3)	% neutral (4)	% positive (5, 6, 7)
By Province/Region			
BC	26	19	55
AB	27	18	55
SK	28	25	47
MB	25	22	53
ON	16	19	64
QC	17	35	48
ATL	14	21	65
PEI	12	17	70
NF	13	23	63
TERR	17	28	55
By Gender			
Men	21	21	58
Women	18	26	57
By Age			
18-24	18	21	62
25-34	17	22	61
35-54	19	24	57
55+	22	24	54
By Education			
< High school	19	35	46
High school	18	29	53
Post-secondary	21	23	57
University	20	17	63
Canada	19	23	57

Feelings Toward Government of Canada

"I would like to know if your feelings toward the Government of Canada are for the most part positive or . . . negative."



- We asked respondents, in addition to rating performance, to describe their general feelings toward the Government.
- Almost six in ten Canadians have positive feelings.
- Only two in ten are negative.
- We held focus groups to probe the reasons for differences in attitude.
- People with positive feelings gave reasons such as:
 - the Government's good management of the economy;
 - its progress in service delivery;
 - steady, dependable leadership; and
 - Canada's quality of life compared to other countries.
- People with negative feelings were less specific; they made general comments such as:
 - government inaction;
 - inefficiency;
 - unresponsiveness; and
 - arrogance.

Elements of Reputation

“For each of the following, how would you rate the performance of the Government of Canada. Please use a 7-point scale where 1 is terrible, 7 is excellent and the mid-point 4 is neither.”

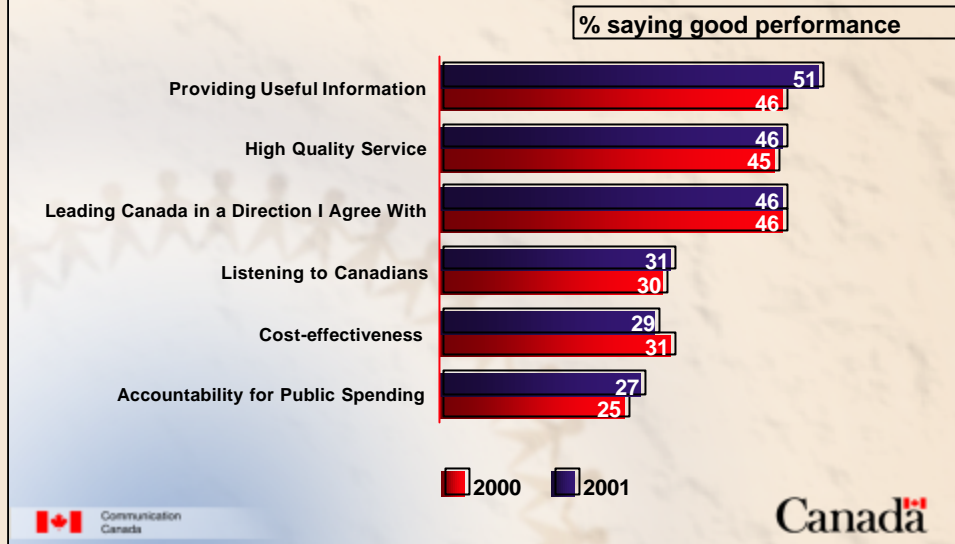
% saying good performance (5, 6, 7)

	Canada	BC	AB	SK	MB	ON	QC	ATL	PEI	NF	TERR
Providing useful information to Canadians	51	45	48	44	42	52	52	56	58	57	46
Providing high quality service	46	39	46	38	36	47	50	50	53	49	46
Leading Canada in a direction I agree with	46	42	46	39	40	51	42	54	56	53	47
Listening to ordinary Canadians	31	22	24	23	23	32	38	31	31	31	32
Managing its operations in a cost-effective way	29	19	24	22	17	29	40	30	31	29	27
Being accountable for public spending	27	18	23	21	16	27	34	27	26	28	28

% saying good performance (5, 6, 7)

	Canada	Gender		Age			
		Men	Women	18-24	25-34	35-54	55+
Providing useful information to Canadians	51	49	52	65	53	48	47
Providing high quality service	46	47	46	59	49	44	42
Leading Canada in a direction I agree with	46	48	45	55	49	45	44
Listening to ordinary Canadians	31	31	31	38	33	29	30
Managing its operations in a cost-effective way	29	31	27	36	29	27	29
Being accountable for public spending	27	28	25	38	26	25	26

Elements of Reputation



- We asked Canadians to rate the Government on six elements of reputation.
- The Government gets good marks for providing useful information, service, and leadership.
- The Government gets poor marks for listening, cost-effectiveness, and accountability for public spending.
- Over the past year, these assessments have changed little.
- The one exception is communication: the rating for providing useful information has increased five points.

Top-of-Mind Issues

“Thinking about the issues facing Canada today, which one would you say the Government of Canada should focus on most?”

Canada

(Issues receiving at least 2% mention)

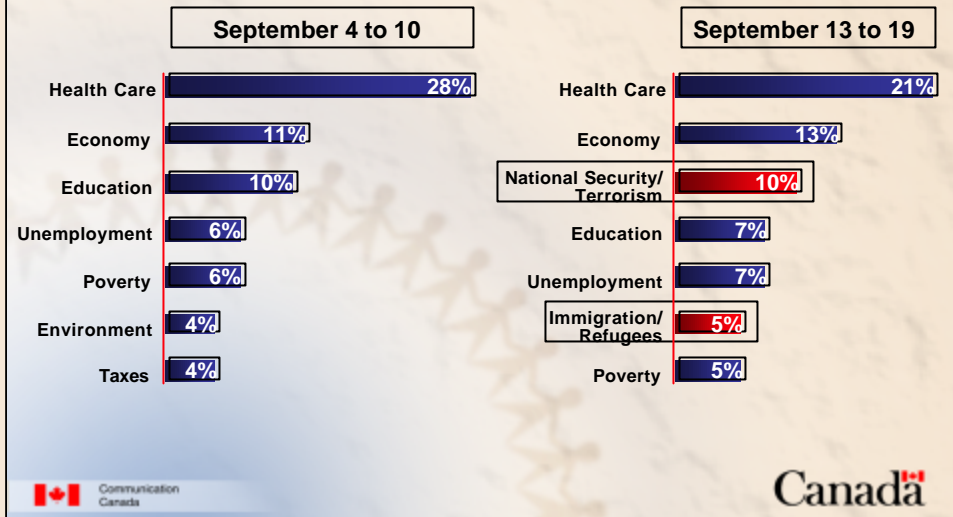
Fall 2001 (Before Sept. 11)

Health Care	28%
Economy	11%
Education	10%
Unemployment	6%
Poverty	6%
Environment	4%
Taxes	4%
Trade	4%
Debt	4%
Unity	3%
Immigration/Refugees	2%

Fall 2001 (Sept. 13-19)

Health Care	21%
Economy	13%
National security/ terrorism	10%
Education	7%
Unemployment	7%
Immigration/Refugees	5%
Poverty	5%
Military	2%
Taxes	2%
Debt	2%
Unity	2%

Top-of-Mind Issues (Unprompted)



- We were in the field just before September 11.
- We found that Canadians wanted the Government to focus on much the same issues as in the spring.
- In the week after September 11, we saw national security and immigration emerge as key issues.

Top-of-Mind Issues

“Thinking about the issues facing Canada today, which one would you say the Government of Canada should focus on most?”

Canada

(Issues receiving at least 2% mention)

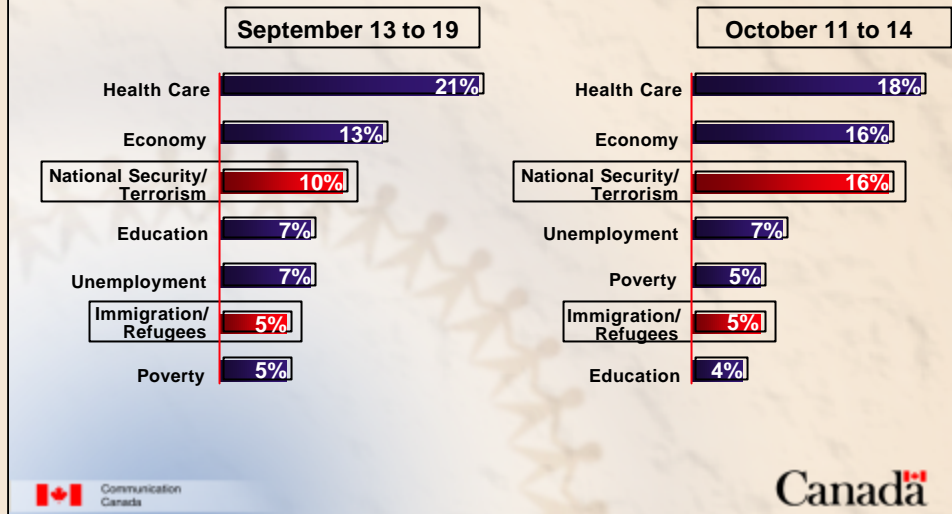
Fall 2001 (Sept. 13-19)

Health Care	21%
Economy	13%
National security/ terrorism	10%
Education	7%
Unemployment	7%
Immigration/refugees	5%
Poverty	5%
Military	2%
Taxes	2%
Debt	2%
Unity	2%

Fall 2001 (Oct. 11-14)

Health Care	18%
Economy	16%
National security/ Terrorism	16%
Unemployment	7%
Immigration/refugees	5%
Poverty	5%
Military	4%
Education	4%
Taxes	3%

Top-of-Mind Issues (Unprompted)



- Since then, immigration has remained at 5%.
- But national security has continued to climb and now stands at 16%.
- It is now one of the top three issues, with health care and the economy.

Top-of-Mind Issues: Trends

Fall 2001 (October 11-14)

By Region (%)

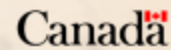
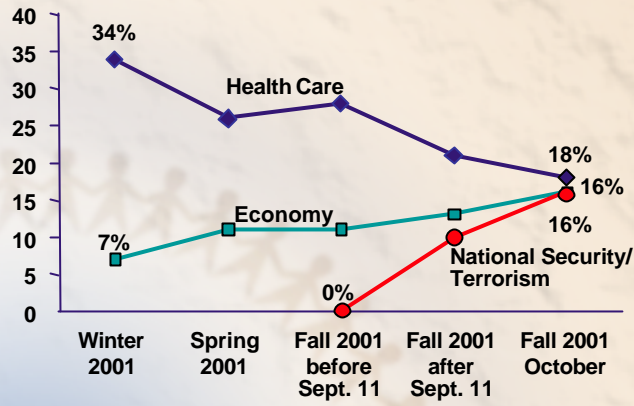
	Canada	BC	AB	MB/SK	ON	QC	ATL
Health Care	18	26	9	12	16	19	21
Economy	16	16	21	22	12	22	10
National Security/ Terrorism	16	12	15	22	21	13	11

By Gender (%)

	Canada	Male	Female
Health Care	18	12	23
Economy	16	19	14
National Security/ Terrorism	16	16	18

Top-of-Mind Issues

Trends



- Here, we see the trends for the top three issues since the beginning of the year.
- Health care has declined from 34% to 18%.
- Mentions of the economy have increased from 7% to 16% as economic growth has slowed.
- National security is climbing fast, from 0% to 16%.

Performance Rating on International Issues

“How would you rate the Government’s performance on the following issues?” Please use a 7-point scale where 1 is terrible, 7 is excellent and the mid-point 4 is neither good nor bad.”

Representing Canada internationally

	Canada	ATL	QC	ON	MB/SK	AB	BC
% positive	54	61	58	52	54	54	45
% neither	26	22	29	24	28	28	26
% negative	18	14	11	21	18	14	27

Improving the well-being of people in other countries

	Canada	ATL	QC	ON	MB/SK	AB	BC
% positive	54	49	44	57	49	57	66
% neither	29	31	35	27	33	26	21
% negative	13	14	16	13	12	11	10

Improving Canada–U.S. relations

	Canada	ATL	QC	ON	MB/SK	AB	BC
% positive	50	62	57	48	40	54	38
% neither	30	24	31	29	33	22	34
% negative	17	9	9	20	24	23	23

Protecting national security

	Canada	ATL	QC	ON	MB/SK	AB	BC
% positive	34	41	43	26	46	28	32
% neither	29	27	30	32	17	31	26
% negative	34	31	22	39	32	39	40

National defence

	Canada	ATL	QC	ON	MB/SK	AB	BC
% positive	22	22	30	18	25	21	18
% neither	29	32	33	28	17	26	28
% negative	46	46	33	50	56	50	51

Immigration

	Canada	ATL	QC	ON	MB/SK	AB	BC
% positive	21	16	22	21	21	21	23
% neither	25	34	28	23	40	17	20
% negative	51	44	46	54	38	61	57

Unweighted sample sizes

	Canada	ATL	QC	ON	MB/SK	AB	BC
Number	1004	81	402	250	81	80	110

October 11-14, 2001

Performance Rating on International Issues



- We now look at the Government's performance evaluation on six international issues, as measured between October 11 and 14.
- The Government's highest ratings are for:
 - international relations, at 54%;
 - helping people in other countries, also at 54%; and
 - Canada-U.S. relations, at 50%.
- In the middle is national security, at 34%.
- Further down are national defence, at 22%, and immigration, at 21%.

Performance Rating on Domestic Issues

“How would you rate the Government of Canada’s performance in each of the following areas? Please use a 7-point scale where 1 is terrible, 7 is excellent and the mid-point 4 is neither.”

% saying good (5, 6, 7)

	Canada	BC	AB	SK	MB	ON	QC	ATL	PEI	NF	TERR
Managing the economy	44	33	41	42	39	47	45	49	51	47	38
Canadian unity	44	40	37	41	37	50	37	52	52	52	46
Innovation	39	28	42	44	35	36	47	45	40	51	27
Environment	38	39	45	35	35	35	38	39	40	38	36
Education	37	40	37	34	32	34	38	41	46	35	37
Crime and justice	35	33	28	29	22	38	34	40	39	41	32
Children’s issues	34	31	31	30	26	36	35	35	33	36	30
Unemployment	33	29	39	28	33	37	28	32	38	27	28
Health Care	29	22	33	28	26	33	26	31	37	25	34
Taxation	27	24	26	22	20	29	28	26	30	22	26
Aboriginal issues	26	24	29	26	21	24	27	28	30	27	33

	% Poor (1, 2, 3)	% Neither (4)	% Good (5, 6, 7)	% Good - % Poor
Managing the economy	26	30	44	+18
Canadian unity	23	32	44	+21
Innovation	19	36	39	+20
Environment	29	33	38	+9
Education	34	28	37	+3
Crime and justice	36	28	35	-1
Children’s issues	31	32	34	+3
Unemployment	31	35	33	+2
Health Care	47	24	29	-18
Taxation	41	31	27	-14
Aboriginal issues	37	34	26	-11

Performance Rating on Domestic Issues



- Canadians' assessment of the Government's performance on domestic issues is highest for managing the economy and Canadian unity, both at 44%.
- The Government gets mid-range assessments for innovation, the environment, education, crime and justice, children's issues and unemployment.
- The lowest ratings are in the areas of health care, taxation and Aboriginal issues.

Priority Issues

“I am going to read you a series of two possible priority areas and I would like you to tell me which one should be given the highest priority by the Government of Canada.”

By Region/Province (%)

	CAN	BC	AB	SK	MB	ON	QC	ATL	PEI	NF	TERR
Health Care	76	76	73	74	74	74	78	79	76	84	66
Education	68	64	67	64	64	69	71	70	71	71	73
Managing the economy	59	64	63	59	58	59	56	58	56	58	52
Children’s issues	58	55	60	60	58	55	63	62	61	65	67
Crime and justice	57	52	60	58	54	59	55	53	51	55	50
Unemployment	52	53	43	50	50	50	58	60	58	63	56
Environment	51	46	57	51	49	53	50	52	55	48	42
Taxation	44	43	45	45	47	43	48	38	39	34	36
Canadian unity	37	36	44	46	41	39	32	39	38	41	36
Promoting Canada as a leader in innovation	33	39	31	31	34	30	35	31	30	32	36
Representing Canada internationally	26	27	27	26	24	26	24	28	25	28	24
Aboriginal issues	24	29	25	35	32	25	16	22	23	19	34

	Canada	By Gender (%)		By Age (%)			
		Men	Women	18-24	25-34	35-54	55+
Health Care	76	73	78	72	74	78	75
Education	68	69	68	77	70	70	61
Managing the economy	59	60	58	57	56	63	58
Children’s issues	58	56	61	64	67	59	49
Crime and justice	57	55	58	55	59	56	56
Unemployment	52	51	54	53	53	53	50
Environment	51	52	51	51	54	51	50
Taxation	44	47	42	38	43	47	44
Canadian unity	37	38	37	39	33	35	44
Promoting Canada as a leader in innovation	33	36	29	32	35	33	32
Representing Canada internationally	26	25	26	30	26	23	29
Aboriginal issues	24	24	24	23	20	23	27

Priority Issues (Prompted)



- One question asked Canadians to rank issues in terms of their longer-term priority for the Government.
- Health care and education are the most important long-term priorities of Canadians.
- Mid-range priorities include unemployment and the environment.
- Innovation, international issues and Aboriginal issues are among the lowest of the twelve priorities.
- (This battery did not include national defence, immigration and protecting national security.)

Health Care

"I am going to read you a series of two possible priority areas and I would like you to tell me which one you think should be given highest priority by the Government of Canada."

"How would you rate the Government of Canada's performance in each of the following areas: Please use a 7-point scale where 1 is terrible, 7 is excellent and the mid-point 4 is neither."

% choosing Health Care	
By Age	
18-24	72
25-34	74
35-54	78
55+	75
By Gender	
Men	73
Women	78
By Province/Region	
BC	76
AB	73
SK	74
MB	74
ON	74
QC	78
ATL	79
PEI	76
NF	84
TERR	66
Canada	76

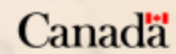
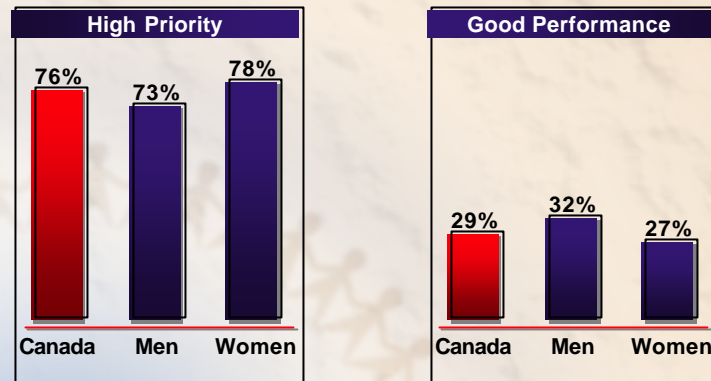
% saying good (5, 6, 7)	
By Age	
18-24	43
25-34	30
35-54	25
55+	30
By Gender	
Men	32
Women	27
By Province/Region	
BC	22
AB	33
SK	28
MB	26
ON	33
QC	26
ATL	31
PEI	37
NF	25
TERR	34
Canada	29

"I am going to read you a series of two possible Government of Canada information areas and I would like you to tell me which one interests you more personally."

% choosing theme

	Canada	Men	Women
Health Care	63	59	67
Taxes	54	56	52
Environmental protection	44	44	44
Finding employment	39	38	39
Access to post-secondary education	36	36	37
Starting a small business	35	39	30
Careers in government	24	24	25

Health Care



- Canadians see health care as a high priority issue and the government information area that interests them the most.
- There is a small but consistent difference between men and women on the issue.
- Women see it as a higher priority, are more critical, and want more information.

Education

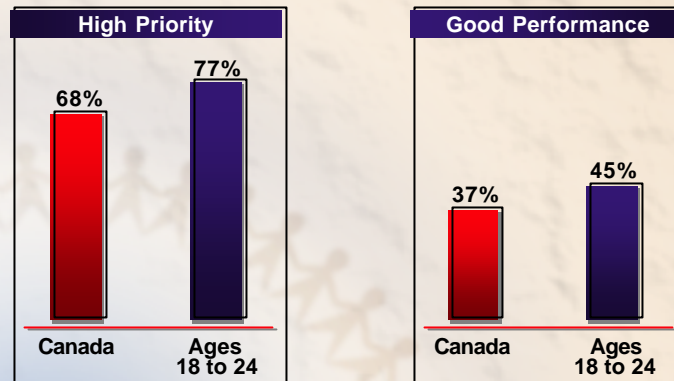
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"How would you rate the Government of Canada's performance in each of the following areas: Please use a 7-point scale where 1 is terrible, 7 is excellent and the mid-point 4 is neither."

% choosing education	
By Age	
18-24	77
25-34	70
35-54	70
55+	61
By Gender	
Men	69
Women	68
By Province/Region	
BC	64
AB	67
SK	64
MB	64
ON	69
QC	71
ATL	70
PEI	71
NF	71
TERR	73
Canada	68

% saying good (5, 6, 7)	
By Age	
18-24	45
25-34	39
35-54	33
55+	38
By Gender	
Men	38
Women	36
By Province/Region	
BC	40
AB	37
SK	34
MB	32
ON	34
QC	38
ATL	41
PEI	46
NF	35
TERR	37
Canada	37

Education



- Education has consistently been a very high priority for Canadians, especially young adults.
- At the same time, the Government's performance evaluation on the issue has been quite high, at 37%, and higher among young people, at 45%.

Unemployment

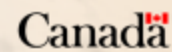
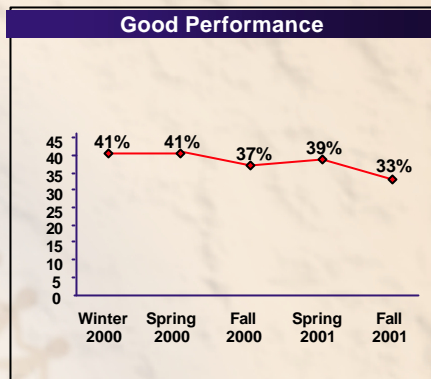
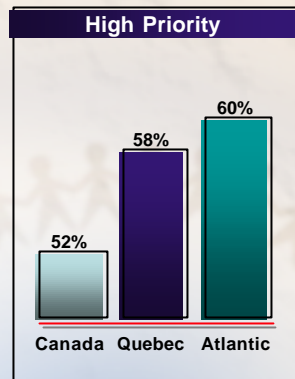
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“How would you rate the Government of Canada’s performance in each of the following areas: Please use a 7-point scale where 1 is terrible, 7 is excellent and the mid-point 4 is neither.”

% choosing unemployment	
By Age	
18-24	53
25-34	53
35-54	53
55+	50
By Gender	
Men	51
Women	54
By Province/Region	
BC	53
AB	43
SK	50
MB	50
ON	50
QC	58
ATL	60
PEI	58
NF	63
TERR	56
Canada	52

% saying good (5, 6, 7)	
By Age	
18-24	39
25-34	36
35-54	31
55+	30
By Gender	
Men	34
Women	32
By Province/Region	
BC	29
AB	39
SK	28
MB	33
ON	37
QC	28
ATL	32
PEI	38
NF	27
TERR	28
Canada	33

Unemployment



- Over half (52%) of Canadians give unemployment a high priority.
- The issue gets even higher priority in Quebec (58%) and the Atlantic region (60%).
- The Government's performance evaluation has declined from 39% positive in spring 2001 to 33% in the fall.
- Positive ratings range from a low of 27% in Newfoundland to a high of 39% in Alberta.

The Environment

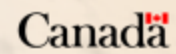
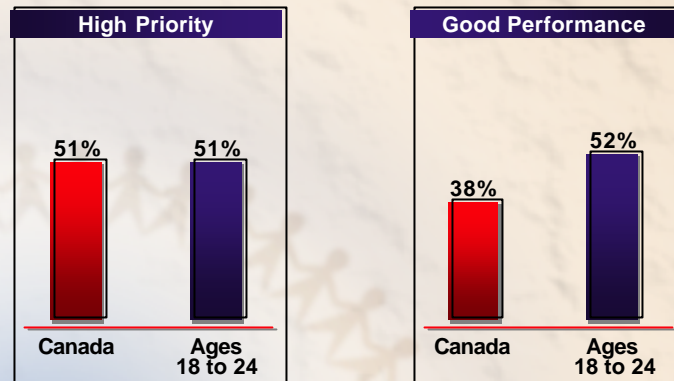
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"How would you rate the Government of Canada's performance in each of the following areas: Please use a 7-point scale where 1 is terrible, 7 is excellent and the mid-point 4 is neither."

% choosing the environment	
By Age	
18-24	51
25-34	54
35-54	51
55+	50
By Gender	
Men	52
Women	51
By Province/Region	
BC	46
AB	57
SK	51
MB	49
ON	53
QC	50
ATL	52
PEI	55
NF	48
TERR	42
Canada	51

% saying good (5, 6, 7)	
By Age	
18-24	52
25-34	41
35-54	34
55+	33
By Gender	
Men	37
Women	38
By Province/Region	
BC	39
AB	45
SK	35
MB	35
ON	35
QC	38
ATL	39
PEI	40
NF	38
TERR	36
Canada	38

The Environment



- Our survey shows that the priority and the performance rating on the environment are still relatively high, and remain steady across all regions.
- Young adults' rating of the Government's performance on this issue is the highest.

Innovation

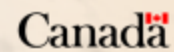
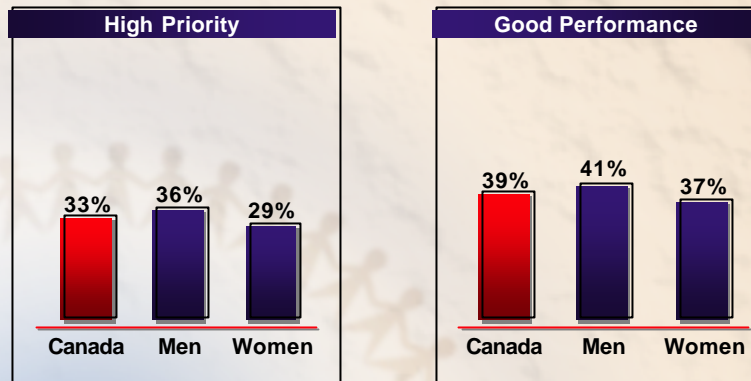
“I am going to read you a series of two possible priority areas and I would like you to tell me which one you think should be given highest priority by the Government of Canada.”

“How would you rate the Government of Canada’s performance in each of the following areas: Please use a 7-point scale where 1 is terrible, 7 is excellent and the mid-point 4 is neither.”

% choosing innovation	
By Age	
18-24	32
25-34	35
35-54	33
55+	32
By Gender	
Men	36
Women	29
By Province/Region	
BC	39
AB	31
SK	31
MB	34
ON	30
QC	35
ATL	31
PEI	30
NF	32
TERR	36
Canada	33

% saying good (5, 6, 7)	
By Age	
18-24	40
25-34	40
35-54	39
55+	39
By Gender	
Men	41
Women	37
By Province/Region	
BC	28
AB	42
SK	44
MB	35
ON	36
QC	47
ATL	45
PEI	40
NF	51
TERR	27
Canada	39

Innovation



- Innovation consistently rates as a low priority among Canadians.
- On the other hand, the Government's performance evaluation on the issue is quite high.
- While one in three Canadians (33%) give it a high priority, the issue gets higher priority from men (36%) than from women (29%).
- And while 41% of men give the Government a positive rating for its performance on this issue, only 37% of women do.

Aboriginal Issues

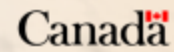
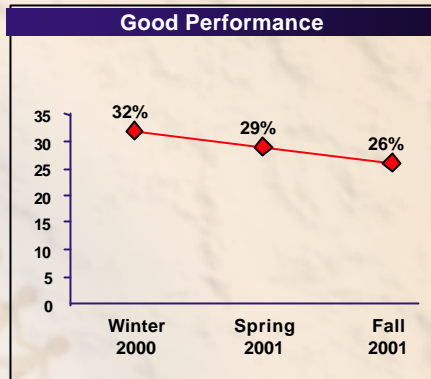
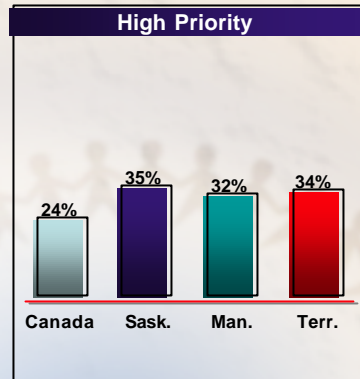
"I am going to read you a series of two possible priority areas and I would like you to tell me which one you think should be given highest priority by the Government of Canada."

"How would you rate the Government of Canada's performance in each of the following areas: Please use a 7-point scale where 1 is terrible, 7 is excellent and the mid-point 4 is neither."

% choosing Aboriginal issues	
By Age	
18-24	23
25-34	20
35-54	23
55+	27
By Gender	
Men	24
Women	24
By Province/Region	
BC	29
AB	25
SK	35
MB	32
ON	25
QC	16
ATL	22
PEI	23
NF	19
TERR	34
Canada	24

% saying good (5, 6, 7)	
By Age	
18-24	28
25-34	24
35-54	24
55+	28
By Gender	
Men	24
Women	27
By Province/Region	
BC	24
AB	29
SK	26
MB	21
ON	24
QC	27
ATL	28
PEI	30
NF	27
TERR	33
Canada	26

Aboriginal Issues



- The evaluation of the Government's performance on Aboriginal issues has dropped slightly since winter 2000 and now stands at 26%.
- This issue is a low priority except in Manitoba, Saskatchewan and the territories.

Communications with First Nations People

“I am going to read you a series of two possible priority areas and I would like you to tell me which one you think should be given highest priority by the Government of Canada?”

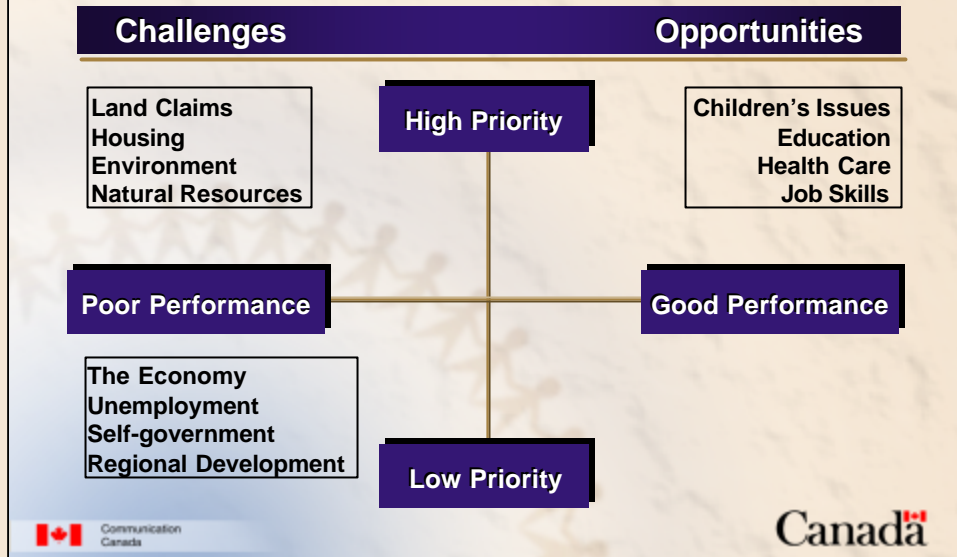
“Generally speaking, how would you rate the performance of the Government of Canada? Please rate on a 7-point scale, where 1 is terrible, 7 is excellent, and the mid-point 4 is neither good nor bad.”

Issues	% of respondents choosing that priority	% saying “good performance” (5, 6, 7)
Children’s issues	71	35
Education	66	39
Health Care	65	33
Land claims	58	30
Job skills	51	13
Housing	48	21
Environment	43	25
Natural resources	41	24
Unemployment	39	20
Aboriginal self-government	36	20
Regional economic development	34	26
Economy	34	27

The First Nations Survey

- This national survey was the first large-scale survey of opinion of First Nations people living on-reserve in Canada.
- The survey was conducted by EKOS Research for Indian and Northern Affairs Canada and Communication Canada.
- Survey was based on 1,427 interviews with persons 18 and over who were members of a band or a First Nation and resident of a reserve.
- Survey was conducted between August 7 and 20, 2001.
- Survey sample consisted of 200 interviews in each of the following: Atlantic region, Quebec, Ontario, Manitoba, Saskatchewan, Alberta and British Columbia. Interviews were not conducted in the territories.
- Maximum margin of error for the national sample was +/-2.6%.

Communications with First Nations People



- A recent survey by Indian and Northern Affairs Canada and Communication Canada shows that social issues such as health care, education and children's issues are the top priorities of First Nations people.
- There are also issues for which First Nations people give the Government good performance ratings.
- On the upper right of the grid are:
 - children's issues;
 - education;
 - health care; and
 - job skills.
- Communication challenges, on the upper left, are high priority issues on which the Government scores less well.
- Key challenges are:
 - land claims;
 - housing;
 - the environment; and
 - natural resources.
- Economic and self-government issues are lower priorities.

Sources of Influence

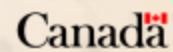
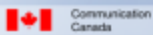
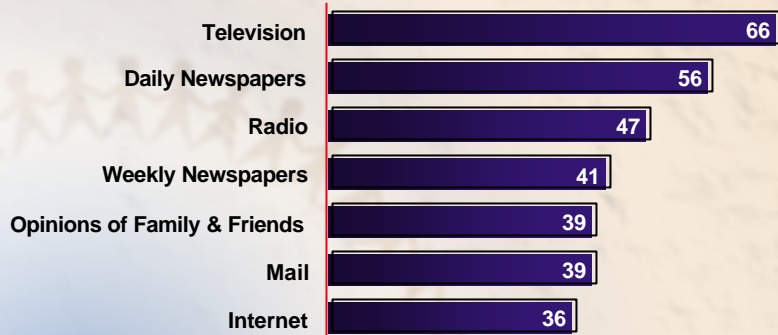
“I’d like you to tell me how influential each of the following are in shaping your overall impression of the Government of Canada. Please use a scale from 1 to 7, where 1 is not influential at all, 7 is very influential and the mid-point 4 is moderately influential.”

% saying influential (5, 6, 7)

	CAN	BC	AB	SK	MB	ON	QC	ATL	PEI	NF	TERR
Television	66	64	69	72	68	67	60	71	70	74	65
Daily newspapers	56	55	60	50	58	61	49	58	62	55	46
Radio	47	47	50	52	48	48	40	54	53	56	60
Weekly newspapers	41	40	41	38	40	44	35	47	43	53	44
Information sent through the mail	39	35	41	37	35	42	36	38	34	44	42
Opinions of family and friends	39	37	39	39	44	42	32	44	42	45	44
Information on the Internet	36	37	40	32	33	37	32	36	32	40	46

Sources of Influence

% saying influential in shaping overall impression of the Government of Canada



- We asked Canadians to rate the influence of various means of communication on their overall impression of the Government.
- Television and daily newspapers lead the way.
- These are the sources with the broadest reach; they influence all population groups.

Influence of the Two Major Media: Television and Daily Newspapers

"I'd like you to tell me how influential each of the following are in shaping your overall impression of the Government of Canada. Please use a scale from 1 to 7, where 1 is not influential at all, 7 is very influential and the mid-point 4 is moderately influential."

% saying influential (5, 6, 7)

By Age

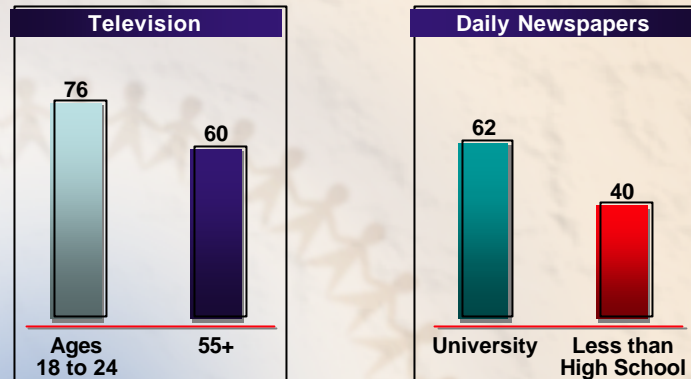
	18-24	25-35	35-54	55+
Television	76	70	64	60
Daily newspapers	63	59	56	52

By Education

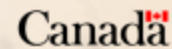
	< High school	High school	Post-secondary	University
Daily newspapers	40	52	56	62
Television	60	67	67	64

Influence of the Two Major Media: Television & Daily Newspapers

% saying influential in shaping overall impression
of the Government of Canada



 Communication
Canada

 Canada

- Although TV and the major dailies reach the vast majority of the population, certain groups are more influenced than others.
- The influence of TV declines with age: young people are more easily influenced by television than older individuals.
- The influence of dailies increases with education. University-educated Canadians are the most likely to be influenced by them. Those with less than high school education are the least likely.

The Impact of Service Experience

“I’d like you to tell me how influential each of the following are in shaping your overall impression of the Government of Canada. Please use a scale from 1 to 7, where 1 is not influential at all, 7 is very influential and the mid-point 4 is moderately influential.”

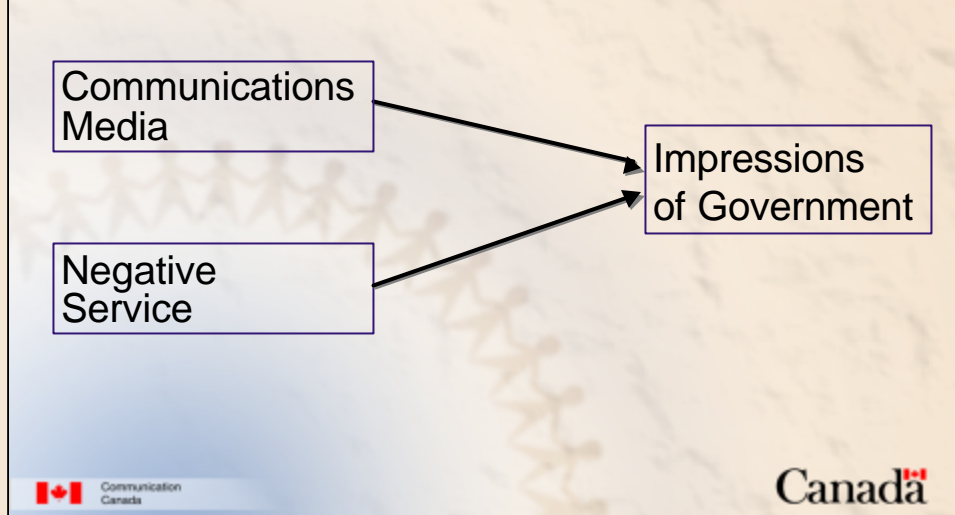
% saying influential (5, 6, 7)

	Canada average	Individuals who contacted the Government in the past three months and rated service as poor	Influence gap
Daily newspapers	56	47	9
Information sent through the mail	39	30	9
Television	66	58	8
Weekly newspapers	41	33	8
Information on the Internet	36	33	3
Radio	47	45	2

Average gap is 6.5 points.

NOTE: The influence gap is present regardless of the demographic group. If an individual has a negative service experience, they accord below-average influence to communications media.

The Impact of Service Experience



- As we have seen, Canadians say that communications media influence their impressions of the Government.
- However, there is one group that is less influenced by communications media.
- These are people who have had negative service experiences.
- These people rate the influence of media lower – on average, seven points lower than do Canadians as a whole.

Conclusions

Canadians' assessment of the Government's overall performance, despite fluctuations in September and October, has remained relatively positive since the spring.

International issues are now the Government's most important communications challenge. National security and terrorism are high-ranking top-of-mind concerns. The performance evaluation on handling relations with the U.S. and other countries and providing international assistance are higher than those for any issue facing the Government, while the ratings on national defence and immigration are relatively low.

On the domestic agenda, health care and education remain top priorities, while the Government gets its highest evaluations for the economy and for Canadian unity.

The economy has re-emerged as a front-ranking issue. While the Government gets a moderately good assessment for managing the economy, the evaluation for unemployment has declined since the spring.

The Survey (Wave X)

- Total sample – 4,721 adults aged 18 and over.
- Maximum margin of error for Canada: 1.5%.
- Over-sampling done in Saskatchewan, Manitoba, Prince Edward Island, Newfoundland, and the territories.
- Interviewing conducted by telephone by the firms Ipsos-Reid and GPC Communications between September 4 and September 19, 2001.
- Focus groups were held September 17-20 in Mississauga, Montréal, Quebec City and Halifax.

Total Interviews by Ipsos-Reid and GPC Communications

	Actual percentage of Canada's population	Proportion of sample in relation to proportion of Canada's population	Number of interviews conducted	Maximum margin of error	Over-sampling (number of persons)
Territories	0.3	14	202	+/-6.9%	188
BC	12.0	566	456	+/-4.7%	
AB	9.3	439	351	+/-5.3%	
SK	3.6	170	320	+/-5.6%	150
MB	4.1	194	320	+/-5.6%	126
ON	37.7	1779	1161	+/-2.9%	
QC	25.2	1190	901	+/-3.3%	
NB	2.6	123	101	+/-10.0%	
NS	3.0	142	102	+/-10.0%	
PEI	0.4	19	403	+/-5.0%	384
NF	1.8	85	404	+/-5.0%	319
ATL	(7.8)	(369)	(1009)	+/-3.1%	(640)
Total	100	4721	4721	+/-1.5%	

The Follow-up Survey (Wave X)

- Total sample – 1,004 adults aged 18 and over.
- Maximum margin of error for Canada: 3.1%.
- Over-sampling in Quebec, Saskatchewan and Manitoba.
- Interviewing conducted by telephone by GPC Research between October 11 and 14, 2001.'

	Actual percentage of Canada's population	Proportion of sample in relation to proportion of Canada's population	Number of interviews conducted	Maximum margin of error	Over-sampling (number of persons)
BC	12.1	134	110	+/-9.5%	
AB	9.3	90	80	+/-11.2%	
SK/MB	7.7	71	81	+/-11.2%	10
ON	37.8	373	254	+/-6.3%	
QC	25.3	254	402	+/-5.0%	148
ATL	7.8	83	81	+/-11.2%	
Total	100	1004		+/-3.1%	