



LISTENING
TO CANADIANS

COMMUNICATIONS
SURVEY



SPRING 2001



Canada
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Canada

Communications Survey



Enquête sur les communications

Listening to Canadians

Communications Survey

Spring 2001

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Introduction

The mandate of the Canada Information Office (CIO) is to improve communications between the Government of Canada and Canadians. In doing so, we promote better corporate communications by the Government as a whole and support the Government's commitment to a strong and united Canada.

The CIO's public opinion research continues to measure Canadians' views on public policy priorities and their assessment of how the Government responds to those priorities.

The Spring 2001 survey also focused on the public's evaluation of the Government in its role as a provider of a wide range of services to Canadians. The research looked at satisfaction with methods of service delivery, views on the advantages and disadvantages of the different methods, and expectations for future service delivery. The research also continued to track Canadians' use of the Internet and Government web sites.

The Ipsos-Reid Group and GPC Communications conducted the survey of 4,704 adults across Canada between May 2 and May 13, 2001.

Executive Summary

The spring 2001 survey reveals a shifting public environment for the Government of Canada. Unfavourable news about the economy over the past six months has affected the level of optimism about the economy's short-term prospects. This, in turn, has impacted on the public policy priorities of Canadians and how they view the Government's handling of these priorities.

Declining optimism about the direction of the economy during the next 12 months has been fuelled by both several months of media reports of a slowdown in the U.S. economy and specific concerns, which include gas prices, layoffs and the dollar. This decline in optimism probably accounts for a slight drop in the Government's performance evaluation on economic management, which, in turn, has negatively impacted the Government's overall performance assessment.

When Canadians were asked to choose one top-of-mind concern, health care continued to dominate the public agenda. However, top-of-mind mentions of health care decreased from winter 2001, while top-of-mind mentions of economic issues increased.

Canadians also rated the priority of 19 public policy issues over the next five years. Of the top five issues, four were related to social issues or the quality of life: health care, education, the environment and children's issues. Managing the economy was also among the top five issues.

Since spring 2000, there have been some important changes in the priority ratings Canadians give to some issues. With a number of environmental stories in the public eye, the priority ratings of the environment (up four points) and food safety (up ten points) have both risen. The priority of Canadian unity has also risen significantly (up seven points). Meanwhile, the priority accorded to taxation has fallen slightly (down three points).

Canadians also rated the Government's performance on these 19 issues. The areas where the Government received the highest performance assessments include promoting trade, food safety, promoting Canada as a leader in technology, managing the economy and Canada-U.S. relations.

There have been numerous changes in the Government's performance assessments since April 2000. The ratings on the economic issues have either remained stationary or declined, probably in response to declining optimism about the economy. The rating on managing the economy has declined four points. This is the only issue on which the Government's performance assessment has declined over the past year. The performance evaluation on unemployment (down two points) and taxation (up one point) have not changed significantly in a statistical sense.

Conversely, the Government's performance assessments have improved on the environmental issues: both the environment (up three points) and food safety (up eight points) show higher levels since spring 2000. The Government's performance on many of the social issues has also improved: crime and justice (up five points), education (up four points) and children's issues (up four points). Ratings have also improved on trade promotion (up four points) and farm income (up three points).

The spring survey also examined Canadians' perceptions of government service delivery. In the three months prior to the survey, 37% of Canadians contacted the Government. The large majority of these were satisfied with the service and information they received.

Fifty-seven per cent of Canadians believe that, in the next five years, service from the Government of Canada will improve, while 26% believe it will worsen. Focus groups suggest that both of these perceptions are being driven, in part, by the Internet.

Canadians expect to have more contact with the Government via the Internet in the future. There is concern by both Internet users and non-users that the Internet will lead to less personal contact with the Government and replace traditional methods of service delivery. Therefore, in the near future, personal, one-on-one service will continue to remain important, regardless of changing technology.

Canadians also expect the Internet will serve as a means of two-way communication between Canadians and the Government.

Internet access and usage continues to grow, particularly usage, which has gone from 7.9 hours per week in fall 2000 to 9.1 hours per week in spring 2001. Visits to Government web sites have also increased from 42% in spring 2000 to 52% in spring 2001.

And finally, the vast majority of Canadians (77%) were optimistic that the Internet would lead to improved service delivery by the Government of Canada because of its ability to deliver faster, more user-friendly, comprehensive information.

Expectations for the Economy: Over the Next 12 Months

“Over the next year or so, do you think Canada’s economy will be going 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.”

	Spring 2000 (%)	Spring 2001 (%)
Better (5,6,7)	40	33
Same (4)	49	45
Worse (1,2,3)	11	21
Total	100	100

Age	Worse (% saying 1,2,3)	Same (% saying 4)	Better (% saying 5,6,7)
18-24	26	44	29
25-34	23	43	33
35-54	21	46	33
55+	17	46	36
Gender			
Men	20	41	38
Women	21	49	29
Education			
< High school	18	54	26
High school	21	49	29
Post-secondary	23	42	35
University	20	43	37
Income			
< \$30K	23	47	28
\$30K to \$59K	21	45	34
\$60K+	19	43	38
Canada	21	45	33

Leading Economic Indicators

	January 2000	April 2000	September 2000	January 2001	April 2001
Unemployment rate (%)	6.8	6.8	6.8	6.9	7.0
TSE 300 Stock Price Index (5-month average for close of month)	7,726	8,967	10,296	9,419	8,378
U.S. Composite Leading Indicator	108.0	108.4	108.3	107.6	107.1



- The analysis of the spring 2001 survey begins with a look at Canadians' expectations for the economy.
- Media coverage over the past six months of a slowing U.S. economy, stock market declines and a slight rise in the unemployment rate has no doubt contributed to the decline in the level of optimism about the direction of the country's economy over the short term. The survey found that one in three (33%) Canadians believe that the economy will do better during the coming 12 months, down from the 40% who were optimistic in April 2000. The level of optimism has dropped in British Columbia, Saskatchewan, Ontario and Quebec, but has increased in Alberta.
- Optimism about the economy over the next 12 months tends to be highest among older people, men, people with post-secondary and university education, and higher-income Canadians.

Economic Growth and Overall Performance Rating

“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.”

	Fall 1998 (% saying 5,6,7)	Spring 2000 (% saying 5,6,7)	Change from Fall 1998	Spring 2001 (% saying 5,6,7)	Change from Spring 2000
BC	29	36	+7	27	-9
AB	31	37	+6	30	-7
SK/MB	31	32	+1	30	-2
ON	39	48	+9	38	-10
QC	26	38	+12	32	-6
ATL	35	42	+7	32	-10
Canada	33	41	+8	33	-8

The Government’s Performance Rating and Optimism About the Economy

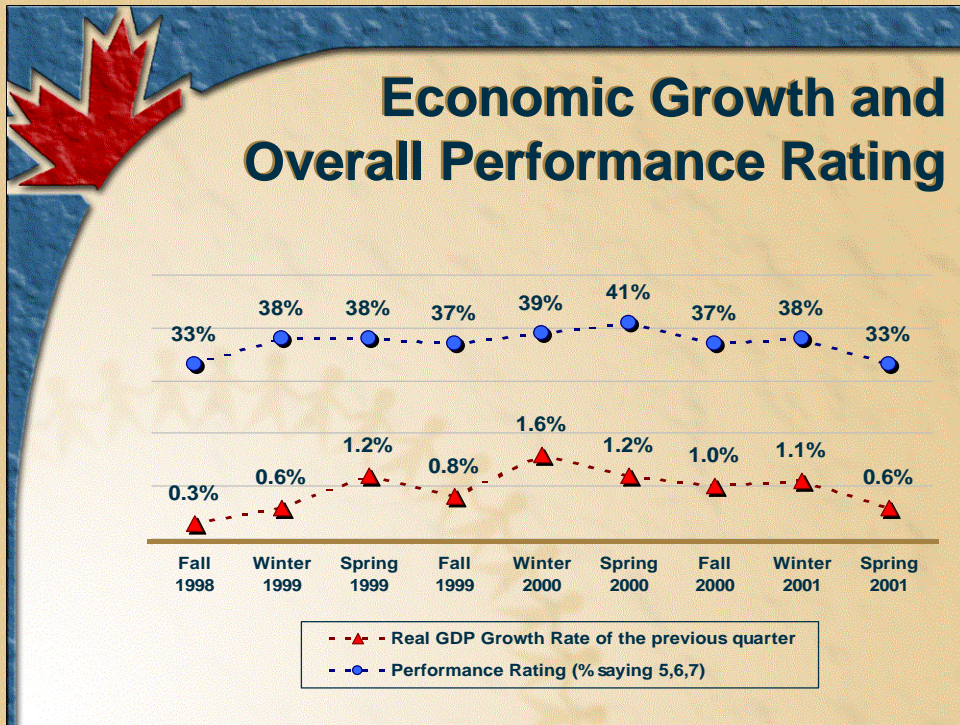
“Over the next year or so, do you think Canada’s economy will be going better, worse, or about the same? Please respond using a 7-point scale where 1 is much worse, 7 is much better and the mid-point 4 is about the same.”

Government’s performance rating	Optimism about the economy		
	Worse (1,2,3) %	Same (4) %	Better (5,6,7) %
Good (5,6,7)	18	30	48
Neither (4)	28	38	33
Poor (1,2,3)	55	33	19
Total	100	100	100

Real Gross Domestic Product and the Government’s Overall Performance Rating

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.”

CIO Survey Period	Overall performance rating (% saying 5,6,7)	Real GDP growth rate (% change in the previous quarter)
Fall 1998	33	0.3
Winter 1999	38	0.6
Spring 1999	38	1.2
Fall 1999	37	0.8
Winter 2000	39	1.6
Spring 2000	41	1.2
Fall 2000	37	1.0
Winter 2001	38	1.1
Spring 2001	33	0.6



- As short-term expectations for the economy have declined in response to media coverage of the U.S. economic slowdown and other economic problems, so has the Government's overall performance evaluation, which declined from 38% in winter 2001 to 33% in the spring 2001 survey.
- The chart above shows the Government's overall performance evaluation and the real gross domestic product growth rate for the preceding quarter.
- Focus groups conducted in May 2001 in relation to this survey suggested that the main contributor to the lower figure is concern about economic issues such as jobs, taxes and gas prices. Other contributors include concern about service quality and health care, and a desire for the Government to account better for its spending.

Performance Ratings

“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.”

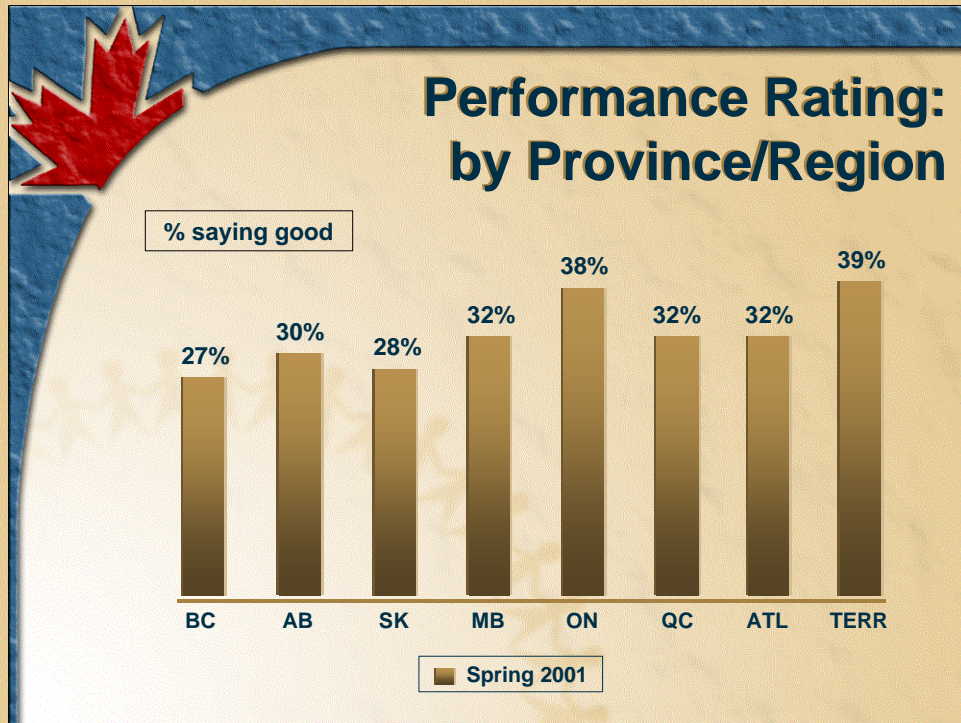
Age	% saying poor (1,2,3)	% saying neither (4)	% saying good (5,6,7)
18-24	29	34	37
25-34	32	34	34
35-54	35	35	30
55+	31	33	35
Total	32	34	33

Gender	% saying poor (1,2,3)	% saying neither (4)	% saying good (5,6,7)
Men	35	29	36
Women	30	38	31
Total	32	34	33

Educational Attainment	% saying poor (1,2,3)	% saying neither (4)	% saying good (5,6,7)
Less than high school	23	49	27
High school completion	32	37	31
Some post-secondary	34	35	30
University completion	33	28	39
Total	32	34	33

Income	% saying poor (1,2,3)	% saying neither (4)	% saying good (5,6,7)
< \$30K	31	36	32
\$30K to \$59K	31	36	33
\$60K+	35	28	36
Total	32	34	33

Urban/Rural residence	% saying poor (1,2,3)	% saying neither (4)	% saying good (5,6,7)
Urban	32	33	34
Rural	34	35	30
Total	32	34	33



- The Government's overall performance evaluation is highest in Ontario and the territories and lowest in British Columbia and Saskatchewan.
- The Government also received a more positive evaluation among men (36%) than among women (31%) and among urban dwellers (34%) than among rural Canadians (30%). University graduates were more likely than Canadians with other types of education to give the Government a positive evaluation (39% positive among university graduates).

Top-of-Mind Issues: Unprompted

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

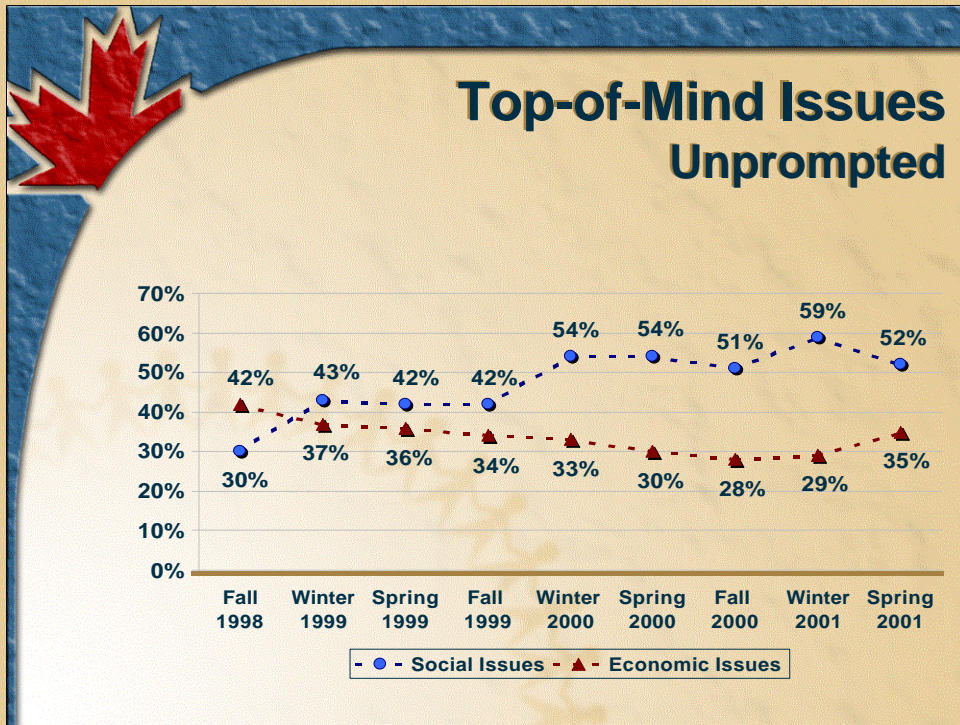
	Canada	BC	AB	SK	MB	ON	QC	ATL	TERR
Health care	26	28	17	25	31	26	26	31	20
Economy	11	12	10	9	9	12	11	8	12
Unemployment	8	5	4	8	3	6	12	13	5
Education	8	6	9	4	7	11	6	9	13
Poverty	6	4	4	3	4	3	11	4	4
Taxes	5	6	4	8	8	5	4	3	2
Debt	5	4	10	4	5	5	4	3	6
Environment	4	5	6	3	3	5	2	4	7
Trade	4	9	1	2	5	4	3	5	1
Canadian unity	3	3	4	2	1	1	5	1	1
Immigration	2	2	2	1	0	2	1	0	1
Social services	2	1	4	2	2	2	3	2	4
Defence	1	0	2	7	1	1	0	1	0
Dollar	1	1	2	1	0	0	0	1	0
Crime	1	1	1	1	1	1	0	1	1
Justice	1	1	0	1	0	2	0	1	3
International affairs	1	1	1	1	1	1	1	1	0
Gas prices	1	0	1	0	1	1	0	1	0
Resources	1	0	1	0	0	1	0	1	0
Youth	1	0	1	1	1	1	1	1	2
Moral	1	0	1	1	1	1	1	0	0
Agriculture	1	0	0	7	4	0	0	0	0

Social issues include:

- Health care 26%
- Education and schools 8%
- Poverty/the poor/welfare 6%
- Environment and pollution 4%
- Moral issues 1%
- Crime and violence 1%
- Immigration/refugees 2%
- Justice system 1%
- Child abuse/youth issues 1%
- Social services 2%

Economic issues include:

- Jobs/unemployment 8%
- Economy in general 11%
- Taxes/GST 5%
- Debt/deficit/govt. spending 5%
- Agriculture/farming 1%
- Oil and gas prices 1%
- Stock market/Canadian dollar/
transportation/roads/infrastructure/
business/industry issues 4%



- When Canadians were asked to name the one issue the Government should focus on most, social issues still predominated. However, the percentage who mentioned social issues has dropped slightly since January, while 35% mentioned economic issues.
- The decline in mentions of social issues is largely due to a decrease in mentions of health care (down from 34% in winter 2001 to 26% in May) and a corresponding increase in mentions of the economy in general (up from 7% to 11%) and unemployment (7% to 8%).
- Health care was mentioned most frequently in Manitoba (31%) and the Atlantic Region (31%). Unemployment was mentioned as a top priority by 12% in Quebec and 13% in the Atlantic Region. Education was mentioned by 11% in Ontario. Poverty was mentioned by 11% in Quebec. Taxes were mentioned by 8% in Manitoba and Saskatchewan, while the debt was mentioned by 10% in Alberta. Trade issues were mentioned by 9% in British Columbia.

19 Priority Issues: Prompted

“Canada is facing a set of difficult challenges. Thinking not just of today but over the next five years, what priority should the Government place on each of the following areas? Please rate your response on a 7-point scale where 1 means the lowest priority, 7 means the highest priority and the mid-point 4 means middle priority.”

	Low (1,2,3) %	Middle (4) %	High (5,6,7) %
Health care	3	5	92
Education	3	7	89
Managing the economy	4	9	86
Environment	5	10	84
Children's issues	5	11	83
Improving Canadians' job skills	6	14	79
Crime and justice	7	14	78
Food safety	7	15	78
Unemployment	7	15	77
Promoting Canada as a leader in technology	9	16	74
Managing forest resources	8	18	72
Relations between the federal and provincial and territorial governments	10	19	70
Taxation	10	19	69
Farm income	10	23	64
Promoting international trade	11	23	64
Canadian unity	16	20	62
Fisheries	13	24	60
Improving Canada-U.S. relations	17	30	51
Aboriginal issues	24	26	48



- Canadians were also asked to rate the importance of 19 issues. Again, they rated health care the top priority, at 92%. However, other social priorities, including education, the environment, children's issues, and crime and justice, were also rated highly.
- Among the economic priorities, managing the economy was rated high by 86%. Forming a second tier of priorities were many of the economic issues, including improving Canadians' job skills, unemployment, promoting Canada as a leader in technology, forest resources, taxation, farm income, promoting international trade and managing the fisheries.
- Unity issues, including relations between the federal and provincial and territorial governments and Canadian unity, occupied a middle rung in terms of priority.

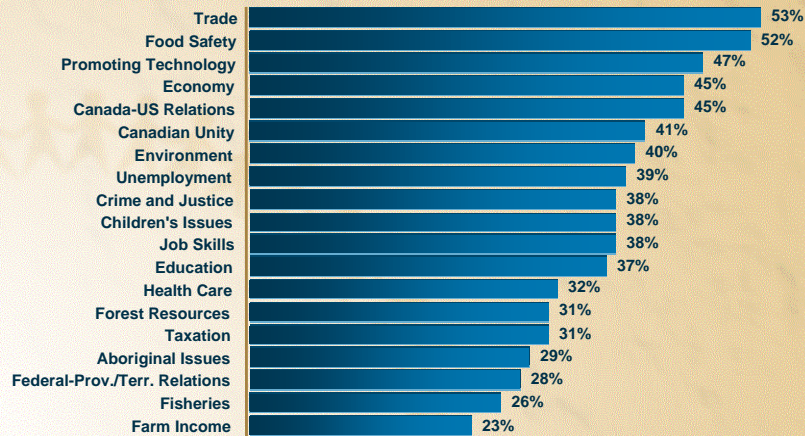
Performance Rating on 19 Priority Issues

“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.”

	Poor (1,2,3) %	Neither (4) %	Good (5,6,7) %
Promoting international trade	12	31	53
Food safety	18	28	52
Promoting Canada as a leader in technology	18	31	47
Improving Canada-U.S. relations	14	38	45
Managing the economy	26	28	45
Canadian unity	24	32	41
Environment	29	30	40
Unemployment	28	32	39
Crime and justice	32	28	38
Improving Canadians’ job skills	25	35	38
Children’s issues	27	33	38
Education	32	30	37
Health care	44	24	32
Taxation	38	30	31
Managing forest resources	27	37	31
Aboriginal issues	31	36	29
Relations between the federal and provincial and territorial governments	36	33	28
Managing the fisheries	33	35	26
Farm income	33	37	23

Performance Rating on 19 Priority Issues

% saying good performance (5,6,7)



- The Government continued to receive its highest performance evaluation on the economic issues, including promoting international trade, promoting Canada as a leader in technology, managing the economy, unemployment and improving Canadians' job skills.
- The Government fared moderately well on many social issues, including the environment, crime and justice, children's issues and education, although performance ratings on health care were somewhat lower.
- The Government tended to perform relatively less well on issues related to the primary sector of the economy, including forest resources, managing the fisheries and farm income.

Communications

Priority question: “Canada is facing a series of difficult challenges. Thinking not just of today but over the next five years, what priority should the Government place on each of the following areas? Please rate your response on a 7-point scale where 1 means the lowest priority, 7 means the highest priority and the mid-point 4 means middle priority.” (% of persons responding 5, 6 or 7 to the question)

Performance question: Respondents are then asked to rate the performance of the Government of Canada in each of these areas on a scale from 1 to 7, with 1 being terrible, 7 being excellent and 4 being the middle point. 5, 6, and 7 are considered good performance ratings; 1, 2, and 3 are considered poor performance ratings. (% of persons responding 5, 6 or 7 to the question)

	High priority (% 5,6,7)	Good performance (% 5,6,7)
Health care	92	32
Education	89	37
Managing the economy	86	45
Environment	84	40
Children’s issues	83	38
Crime and justice	78	38
Food safety	78	52
Unemployment	77	39
Taxation	69	31
Farm income	64	23
Promoting international trade	64	53
Canadian unity	62	41
Managing the fisheries	60	26
Aboriginal issues	48	29
Improving Canadians’ job skills	79	38
Promoting Canada as a leader in technology	74	47
Managing forest resources	72	31
Relations between the federal and provincial and territorial governments	70	28
Improving Canada-U.S. relations	51	45

Definitions:

Priority

- Lower priority: 0% to 69% give a high priority (5,6,7)
- Moderately high priority: 70% to 84% give a high priority (5,6,7)
- High priority: 85% or more give a high priority (5,6,7)

Performance

- Lower performance: 0% to 34% give good performance rating (5,6,7)
- Moderately high performance: 35% to 49% give good performance rating (5,6,7)
- High performance: 50% or more give good performance rating (5,6,7)

Communications

	Challenges		Strengths
	Lower Performance	Moderately High Performance	High Performance
High Priority	Health Care	Managing the Economy Education	
Moderately High Priority	Forest Resources Federal-Provincial/ Territorial Relations	Promoting Technology Environment Children's Issues Crime and Justice Unemployment Job Skills	Food Safety
Lower Priority	Taxation Fisheries Aboriginal Issues Farm Income	Canadian Unity	Promoting International Trade Improving Canada-US Relations

- Communications strengths are issues Canadians see as being high priority and for which they give the Government a good performance evaluation. So, at the top of the diagram, the economy and education stand out as high priority issues on which the Government received a moderately high performance evaluation. The Government received its highest performance evaluation for food safety, promoting international trade and Canada-U.S. relations, but these issues tended to have lower priority with the public.
- The Government received moderately high priority and performance ratings for promoting Canadian technology, the environment, childrens' issues, crime and justice, unemployment and job skills.
- Health care remains a communications challenge, as the issue had a very high priority with the public, while the Government's performance received a relatively low evaluation. Other important communications challenges included federal-provincial/territorial relations and managing forest resources.

Shifting Issues

“Canada is facing a set of difficult challenges. Thinking not just of today but over the next five years, what priority should the Government place on each of the following areas? Please rate your response on a 7-point scale where 1 means the lowest priority, 7 means the highest priority and the mid-point 4 means middle priority.”
 (% of persons responding 5, 6 or 7 to the question)

“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.”
 (% of persons responding 5, 6 or 7 to the question)

	% High priority (5,6,7)			% Good performance (5,6,7)		
	Spring 2000	Spring 2001	Change	Spring 2000	Spring 2001	Change
Health care	94	92	-2	30	32	+2
Education	89	89	0	33	37	+4
Economy	86	86	0	49	45	-4
Children’s issues	83	83	0	34	38	+4
Environment	80	84	+4	37	40	+3
Crime and justice	77	78	+1	33	38	+5
Taxation	72	69	-3	30	31	+1
Food safety	68	78	+10	44	52	+8
Trade	64	64	0	49	53	+4
Farm income	63	64	+1	20	23	+3
Canadian unity	55	62	+7	41	41	0

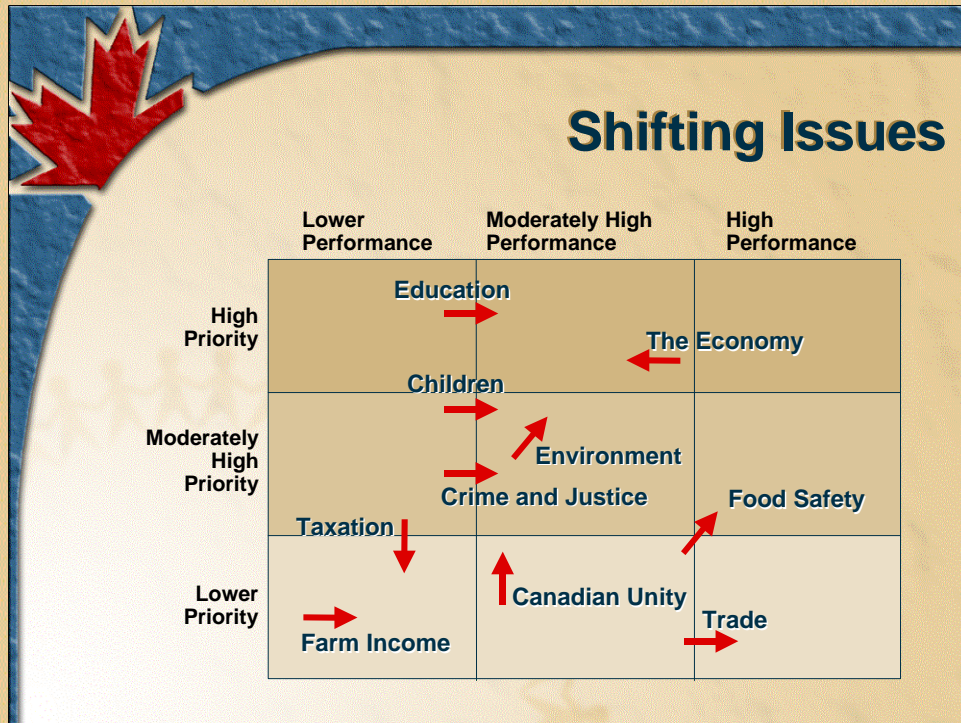
Definitions:

Priority

- Lower priority: 0% to 69% give a high priority (5,6,7)
- Moderately high priority: 70% to 84% give a high priority (5,6,7)
- High priority: 85% or more give a high priority (5,6,7)

Performance

- Lower performance: 0% to 34% give good performance rating (5,6,7)
- Moderately high performance: 35% to 49% give good performance rating (5,6,7)
- High performance: 50% or more give good performance rating (5,6,7)



- In the past year, there have been numerous changes in the priority accorded to the issues and the evaluation of the Government's performance on them.
- The priority accorded to the environment, food safety and Canadian unity have increased in the past year, while that for taxation has decreased slightly.
- The Government's performance evaluation has increased in several areas, most notably on the social and environmental issues. These include education, children's issues, the environment, crime and justice, and food safety. The Government's performance evaluation on promoting trade has also improved.
- The Government's performance evaluation has declined slightly in only one area in the past year: managing the economy.

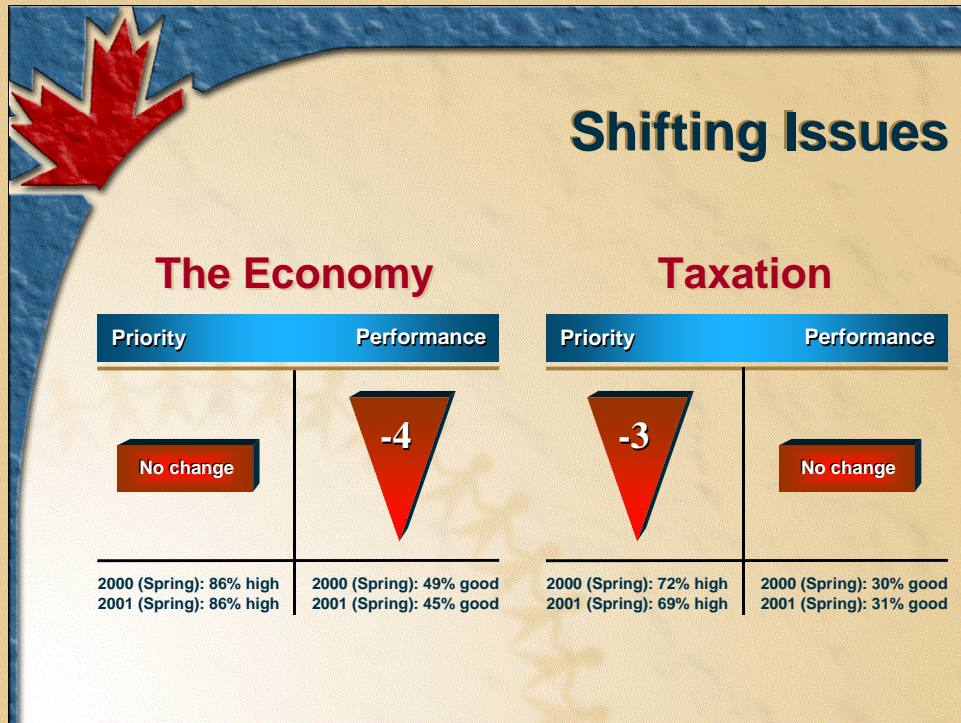
Shifting Issues: The Economy and Taxation

“Canada is facing a set of difficult challenges. Thinking not just of today but over the next five years, what priority should the Government place on each of the following areas? Please rate your response on a 7- point scale where 1 means the lowest priority, 7 means the highest priority and the mid-point 4 means middle priority.”

“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.”

Region	Economy		Taxation	
	High priority (% 5,6,7)	Good performance (% 5,6,7)	High priority (% 5,6,7)	Good performance (% 5,6,7)
BC	90	31	74	20
AB	84	39	68	28
SK	83	33	68	24
MB	84	46	67	32
ON	86	47	69	34
QC	86	52	70	35
ATL	83	47	68	33
TERR	80	43	56	29
Age				
18-24	87	41	67	31
25-34	88	45	72	32
35-54	86	44	71	30
55+	83	49	67	33
Education				
< High school	75	50	58	33
High school	84	41	71	30
Post-secondary	89	41	71	31
University	87	50	69	33
Income				
<\$30K	82	43	66	34
\$30K to \$59K	87	44	71	30
\$60K+	88	49	72	32
Gender				
Men	84	48	66	32
Women	88	42	73	31
Canada	86	45	69	31

Shifting Issues



- Managing the economy remained a high priority among all segments of Canada's population. However, the Government's performance evaluation on this issue has declined by four percentage points during the past year. The Government received its highest performance evaluation in Quebec, and lowest in Saskatchewan and British Columbia.
- The priority of taxation has dropped slightly since April 2000 (from 72% to 69%), while the Government's performance evaluation has remained steady. The Government received its highest performance evaluation for this issue in Ontario and Quebec, and its lowest in Saskatchewan and British Columbia.

Shifting Issues: The Environment and Food Safety

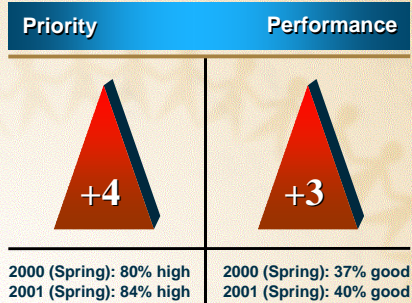
“Canada is facing a set of difficult challenges. Thinking not just of today but over the next five years, what priority should the Government place on each of the following areas? Please rate your response on a 7-point scale where 1 means the lowest priority, 7 means the highest priority and the mid-point 4 means middle priority.”

“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.”

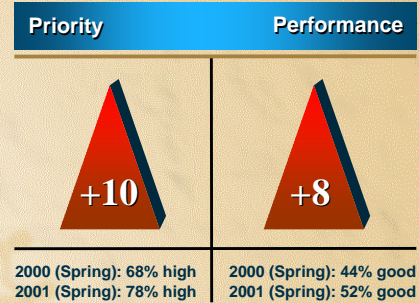
Region	Environment		Food safety	
	High priority (% 5,6,7)	Good performance (% 5,6,7)	High priority (% 5,6,7)	Good performance (% 5,6,7)
BC	80	42	75	48
AB	78	39	71	48
SK	74	32	75	50
MB	83	39	75	48
ON	87	37	79	52
QC	85	45	82	57
ATL	83	40	79	56
TERR	75	46	70	51
Age				
18-24	85	47	76	57
25-34	86	41	77	54
35-54	86	39	78	50
55+	80	38	80	52
Education				
< High school	74	49	84	63
High school	81	45	81	57
Post-secondary	84	40	79	51
University	87	35	74	48
Income				
< \$30K	81	45	80	56
\$30K to \$59K	86	41	80	53
\$60K+	85	43	73	50
Gender				
Men	82	39	73	52
Women	86	42	83	53
Canada	84	40	78	52

Shifting Issues

The Environment



Food Safety



- Both the priority and the performance ratings on the environment have increased moderately, by four and three points, respectively. The Government received its highest evaluation on the issue in Quebec (45%) and the territories (46%), among young adults (47%), and among persons with less than high school education (49%).
- Similarly, the priority and the Government's performance evaluation on food safety has increased since April 2000. The issue was a particularly high priority among Quebecers (82%), persons with less than high school education (84%), and women (83%).

Shifting Issues: Canadian Unity and Farm Income

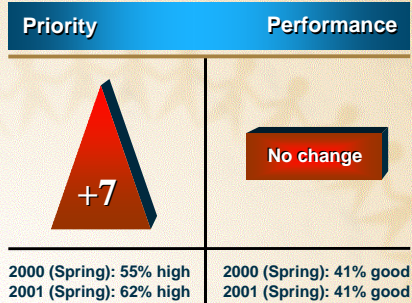
“Canada is facing a set of difficult challenges. Thinking not just of today but over the next five years, what priority should the Government place on each of the following areas? Please rate your response on a 7-point scale where 1 means the lowest priority, 7 means the highest priority and the mid-point 4 means middle priority.”

“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.”

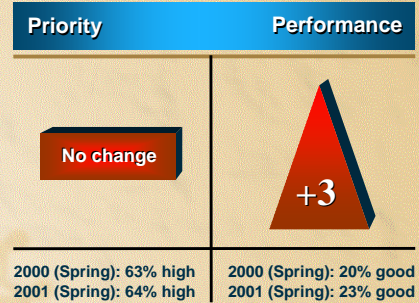
Region	Canadian unity		Farm income	
	High priority (% 5,6,7)	Good performance (% 5,6,7)	High priority (% 5,6,7)	Good performance (% 5,6,7)
BC	63	37	62	15
AB	63	35	68	21
SK	55	32	71	13
MB	62	43	74	23
ON	67	45	67	21
QC	53	41	57	33
ATL	68	45	66	24
TERR	68	45	57	15
Age				
18-24	60	42	59	23
25-34	55	38	59	23
35-54	60	40	66	21
55+	72	45	69	27
Education				
< High school	63	47	63	39
High school	66	43	66	27
Post-secondary	60	39	65	21
University	60	41	62	19
Income				
<\$30K	66	44	67	29
\$30K to \$59K	62	42	64	23
\$60K+	58	39	62	19
Gender				
Men	59	40	60	23
Women	65	43	68	23
Canada	62	41	64	23

Shifting Issues

Canadian Unity



Farm Income



- The priority rating of Canadian unity has risen seven points in the past year, while the Government's performance evaluation on the issue has remained steady. Canadian unity received relatively high priority from persons 55 and over (72%). The Government received its best performance evaluation on Canadian unity in Ontario (45%), the Atlantic region (45%) and the territories (45%), and from persons 55 and over (45%).
- The priority of farm income has remained steady. The issue is rated highest as a priority in Alberta (68%), Saskatchewan (71%) and Manitoba (74%). The Government's performance evaluation on farm income has increased slightly since April 2000. The Government received its highest performance evaluation in Quebec (33%), and its lowest in Saskatchewan (13%).

Shifting Issues: Crime and Justice and Promoting Trade

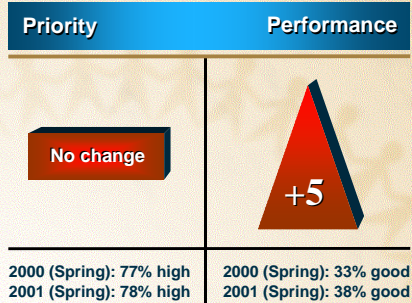
“Canada is facing a set of difficult challenges. Thinking not just of today but over the next five years, what priority should the Government place on each of the following areas? Please rate your response on a 7-point scale where 1 means the lowest priority, 7 means the highest priority and the mid-point 4 means middle priority.”

“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.”

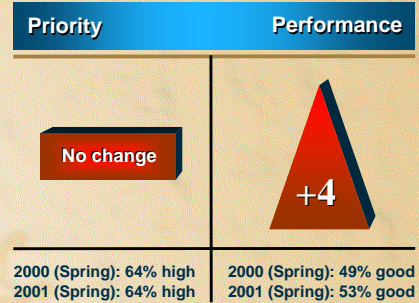
Region	Crime and justice		Promoting trade	
	High priority (% 5,6,7)	Good performance (% 5,6,7)	High priority (% 5,6,7)	Good performance (% 5,6,7)
BC	79	34	67	47
AB	78	32	64	52
SK	74	29	62	48
MB	78	33	63	56
ON	78	39	64	54
QC	79	42	62	54
ATL	76	46	62	52
TERR	73	45	56	46
Age				
18-24	80	47	57	54
25-34	79	40	62	50
35-54	76	36	63	51
55+	79	37	70	57
Education				
< High school	80	47	59	53
High school	82	39	61	49
Post-secondary	80	36	66	50
University	72	39	65	59
Income				
<\$30K	79	41	62	51
\$30K to \$59K	81	37	63	52
\$60K+	74	39	66	56
Gender				
Men	73	38	66	55
Women	83	39	61	51
Canada	78	38	64	53

Shifting Issues

Crime and Justice



Promoting Trade



- While the priority of crime and justice has remained steady, the Government's performance evaluation on this issue has increased five points, from 33% to 38%. Crime and justice was rated higher as a priority among women (83%) than among men (73%). Among the regions of the country, the Government received its highest evaluations in the territories (46%), the Atlantic region (45%) and Quebec (42%), and its lowest in Alberta (32%) and Saskatchewan (29%).
- The priority of promoting international trade remains steady, while the Government's performance evaluation on this issue has increased four points since Spring 2000. The priority accorded to trade is higher among persons 55 and over (70%) than among persons 18 to 24 (57%). The Government received its highest performance evaluation on trade in Manitoba (56%), Ontario (54%) and Quebec (54%), and its lowest in Saskatchewan (48%) and British Columbia (47%).

Overall Performance Rating: The Most Important Drivers

“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.”

“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.”

“How would you rate the Government of Canada on the following dimensions of service delivery. Please use a 7-point scale from 1 to 7 where 1 means poor and 7 means excellent, and the mid-point 4 means neither poor nor excellent.

Overall performance rating	% giving “good” rating (5,6,7) for Government’s performance on...					
	Economy	Service	Taxation	Health care	Crime and justice	Canadian unity
Poor (1,2,3)	23	27	17	19	23	27
Neither (4)	41	46	28	31	39	39
Good (5,6,7)	71	68	50	47	54	59
Canada	45	46	31	32	38	41

Model Summary

Model	Unstandardized Coefficients		Standardized Coefficients	t	Sig.
	B	Std. Error	Beta		
1 (constant)	.947	.073		12.890	.000
Performance on managing the economy	.228	.015	.235	15.204	.000
Performance on service	.192	.012	.210	15.490	.000
Performance on taxation	.106	.014	.116	7.752	.000
Performance on Canadian unity	8.601E-02	.013	.089	6.430	.000
Performance on crime and justice	5.527E-02	.013	.060	4.120	.000
Performance on health care	4.486E-02	.013	.051	3.458	.001

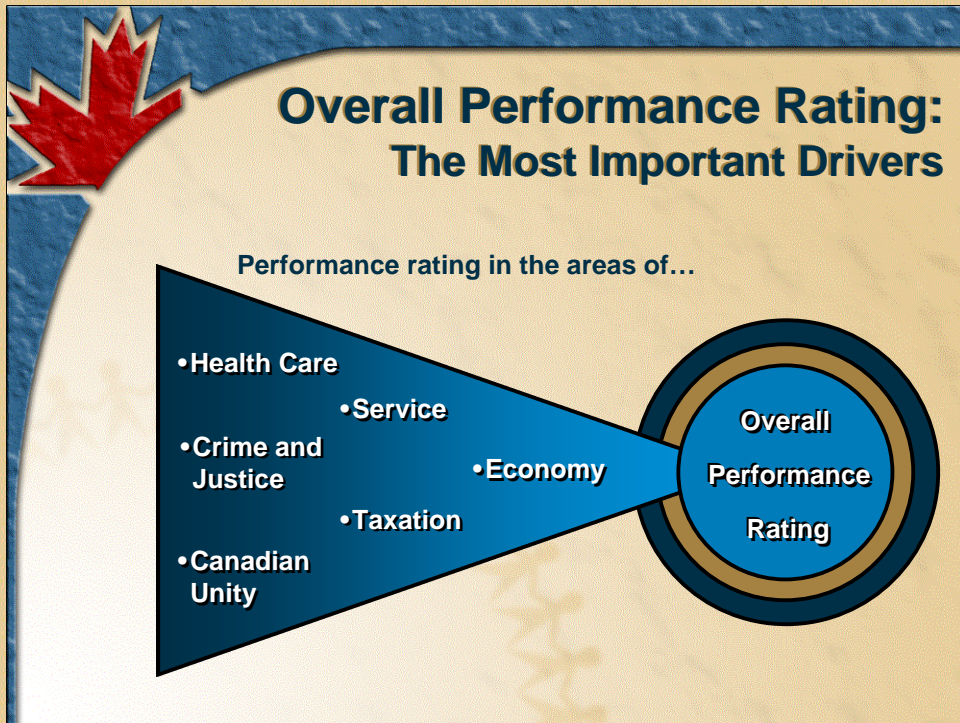
R Square (the model)

R	R Square	Adjusted R Square	Std. Error of the Estimate
.538 ^a	.290	.289	1.26

ANOVA (the model)

Model	Sum of Squares	df	Mean Square	F	Sig.
Regression	3048.519	6	508.087	319.561	.000 ^a
Residual	7468.008	4697	1.590		
Total	10516.527	4703			

a. Dependent Variable: 3. Generally speaking, how would you rate the performance of the Government of Canada?



- Analysis of the survey results and the focus group discussions conducted in May 2001 in relation to the survey suggests that the perception of the Government's performance in the area of economic management has the single strongest relationship with overall performance assessment.
- The perception of the quality of Government of Canada service to the public has the second strongest relationship with overall performance.
- Next is the perception of the Government's performance on taxation.
- Other issues that have a moderately strong relationship with overall performance include perceptions of how the Government is handling health care, crime and justice, and the Canadian unity issue.

Contact with the Government of Canada

Connection Between Good Service & Good Performance

“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.”

“And how do you rate the overall quality of the service or information you received? Please use a 7-point scale where 1 means very poor, 7 means very good, and 4 means neither good nor poor.”

Winter 2001

Rating of overall performance (see note)	Total, Canada %	Poor quality of service/information %	Neutral quality of service/information %	Good quality of service/information %
Good (% 5,6,7)	41	27	38	46
Neutral (% 4)	29	29	28	29
Poor (% 1,2,3)	31	44	34	25
Total	100	100	100	100

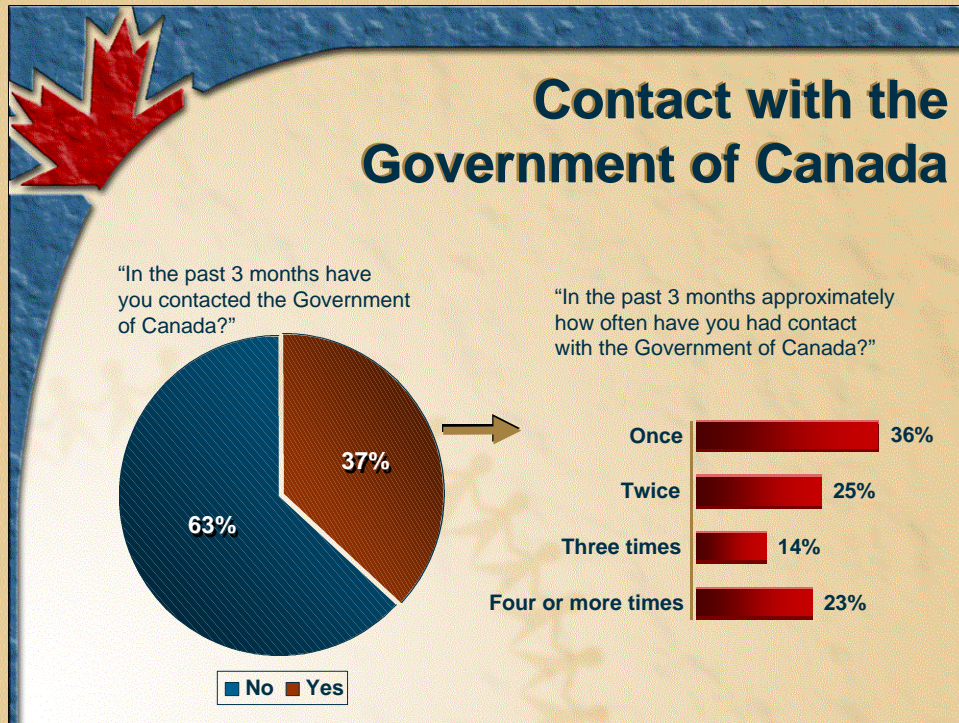
NOTE: Based on a sub-sample of those who contacted the Government in the 3 months prior to the survey, N=1788

Spring 2001

Rating of overall performance (see note)	Total, Canada %	Poor quality of service/information %	Neutral quality of service/information %	Good quality of service/information %
Good (% 5,6,7)	34	20	24	41
Neutral (% 4)	31	20	40	32
Poor (% 1,2,3)	35	59	36	27
Total	100	100	100	100

NOTE: Based on a sub-sample of those who contacted the Government in the 3 months prior to the survey, N=1749

Contact with the Government of Canada



- Since service quality is second only to economic management as a driver of the Government's overall performance evaluation, we also measured contact with the Government, and perceptions of service delivery, in the past, present and future.
- In the three months prior to the survey, 37% of Canadians contacted the Government of Canada. Canadians were most likely to contact the Government by telephone and, to a lesser extent, the Internet, and in person.
- Thirty-six per cent of Canadians who had contacted the Government had done so once. One-quarter had contacted the Government twice, while 37% had done so three or more times. This represents no real change from fall 2000.

Overall Satisfaction Rating

“How do you rate the overall quality of the service or information you received? Please use a 7-point scale where 1 means very poor, 7 means very good and 4 means neither good nor poor.”

(% saying good)

Winter 1999	Spring 1999	Spring 2000	Fall 2000	Winter 2001	Spring 2001
55	59	60	65	62	64

Spring 2001

By Region

	Canada	BC	AB	SK	MB	ON	QC	NS	NB	ATL	TERR
Good (% 5,6,7)	64	64	62	60	62	64	66	66	68	67	49
Neither (% 4)	16	16	14	18	19	16	18	16	13	15	39
Poor (% 1,2,3)	19	19	24	21	17	19	15	16	18	17	11

Satisfaction Rating by Method of Contact

“Thinking about your most recent experience, how did you contact the Government of Canada? Did you contact the Government of Canada by [telephone][Internet][Government of Canada web site – www.canada.gc.ca][mail] [in person][1 800 numbers]?”

“How do you rate the overall quality of the service or information you received? Please use a 7-point scale where 1 means very poor, 7 means very good and 4 means neither good nor poor.”

	% saying good
Internet	73
www.canada.gc.ca	68
Mail	68
Telephone	63
In person	63
1 800 numbers	63

“Did you get what you were looking for?”

	BC	AB	SK	MB	ON	QC	NB	NS	ATL	Canada
Yes (% all)	59	61	67	65	68	69	71	66	66	66
Yes (% in part)	22	23	13	17	18	20	12	17	15	19
No (%)	17	17	19	18	13	10	18	17	18	14



- Satisfaction with service has been rising steadily since winter 1999, with the exception of a slight dip in winter 2001.
- In spring 2001, those who had contacted the Government were three times as likely to rate the quality of the service good (64%) as they were to rate it poor (19%).
- In particular, Canadians were most satisfied with the service they received through the Internet.
- Canadians who had contacted the Government believed they got what they were looking for. Eighty-five per cent said that all (66%) or part (19%) of their requirement had been met.

Perceptions of Government Service Delivery

“How would you rate the Government of Canada on the following dimensions of service delivery. Please use a 7-point scale from 1 to 7 where 1 means poor and 7 means excellent, and the mid-point 4 means neither poor nor excellent. 1) Being Innovative 2) Being Reliable 3) Being Accessible 4) Being Respectful.”

	Innovative	Reliable	Accessible	Respectful
Good (% 5,6,7)	37	46	50	57
Neither (% 4)	35	30	24	23
Poor (% 1,2,3)	22	22	22	17

By Province (Overall)

Innovative

	BC	AB	SK	MB	ON	QC	NB	NS	ATL	Total
Good (% 5,6,7)	30	33	29	34	39	41	43	38	41	37
Neither (% 4)	35	39	38	34	32	39	36	37	36	35
Poor (% 1,2,3)	29	23	27	27	24	15	16	20	18	22

Reliable

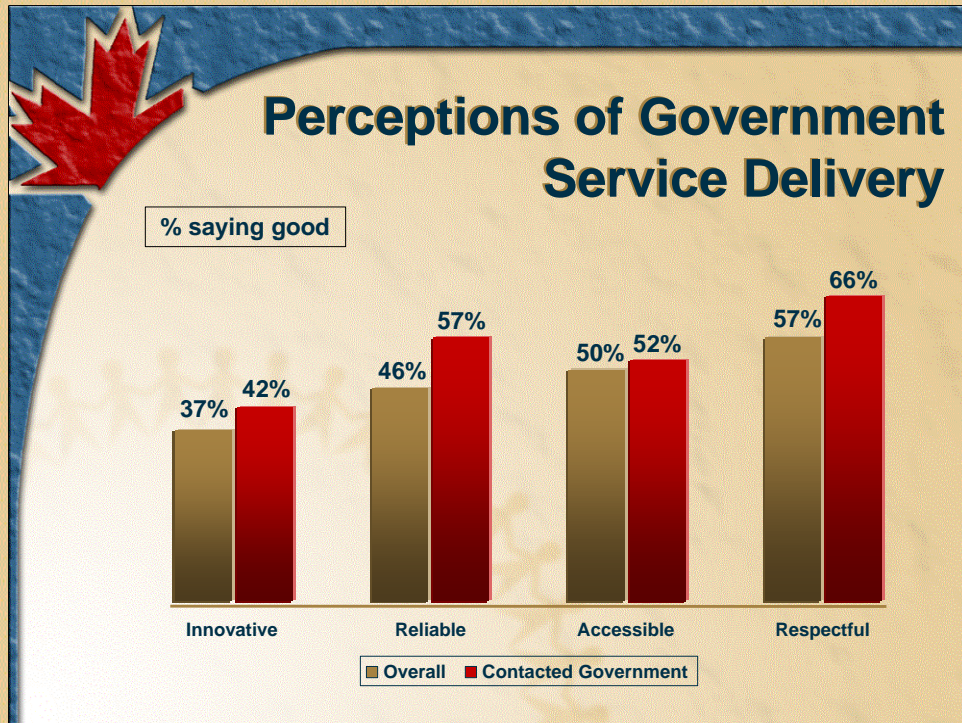
	BC	AB	SK	MB	ON	QC	NB	NS	ATL	Total
Good (% 5,6,7)	43	40	38	41	45	51	47	39	44	46
Neither (% 4)	28	29	32	30	29	31	29	35	31	30
Poor (% 1,2,3)	26	25	28	26	22	16	20	24	22	22

Accessible

	BC	AB	SK	MB	ON	QC	NB	NS	ATL	Total
Good (% 5,6,7)	46	52	48	50	49	50	55	53	54	50
Neither (% 4)	23	21	22	27	23	28	25	23	25	24
Poor (% 1,2,3)	28	23	28	19	24	19	16	22	18	22

Respectful

	BC	AB	SK	MB	ON	QC	NB	NS	ATL	Total
Good (% 5,6,7)	54	52	56	52	55	62	62	57	60	57
Neither (% 4)	24	22	19	24	24	23	22	23	22	23
Poor (% 1,2,3)	19	22	23	22	18	12	12	17	14	17



- Our winter 2001 survey found that ratings of all dimensions of service delivery, as well as those for overall service quality, increased when Canadians contacted the Government of Canada. Our spring survey confirms this finding, particularly with regard to reliable and respectful service.

Perceptions of Service Delivery: Past

“Do you believe the quality of service from the Government of Canada has gotten better or worse in the past 5 years?”

By Province (%)

	BC	AB	SK	MB	ON	QC	NB	NS	ATL	Total
Better	34	44	36	42	42	52	51	37	47	44
Worse	43	34	44	33	36	25	29	44	35	34
Same	16	17	16	19	19	19	17	17	16	18

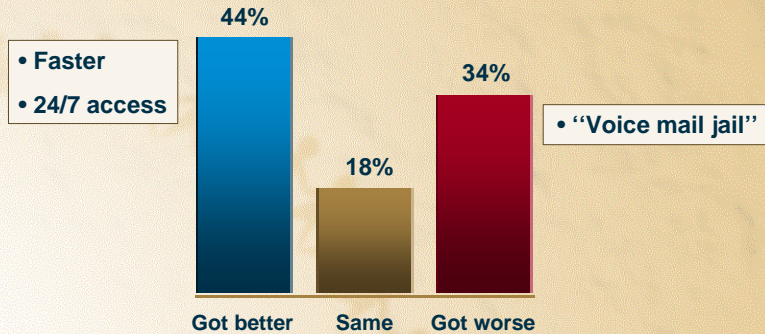
By Age (%)

	18-24	25-34	35-54	55+	Total
Better	57	49	41	39	44
Worse	22	30	38	35	34
Same	15	16	17	22	18

By Income (%)

	< \$30K	\$30K-\$59K	\$60K+	Total
Better	47	44	44	44
Worse	34	32	34	34
Same	16	20	18	18

Perceptions of Service Delivery: Past



- Canadians were also asked about their perceptions of service delivery in the past five years and in the five years to come.
- Forty-four per cent of Canadians believed service from the Government of Canada had improved in the past five years, while 34% believed it had worsened.
- Focus groups suggest that both of these perceptions have been driven, in part, by electronic communications. The Internet, providing the ability to access information fast on a “24/7” basis, accounts for the perceived improvement.
- Automated telephone systems and “voice mail jail” have led to the perception of worsened service. In our January survey, 81% of Canadians believed they would get an answering machine when they called 1 800 O-Canada.

Perceptions of Service Delivery: Future

“Do you believe the quality of service from the Government of Canada will improve or worsen over the next 5 years?”

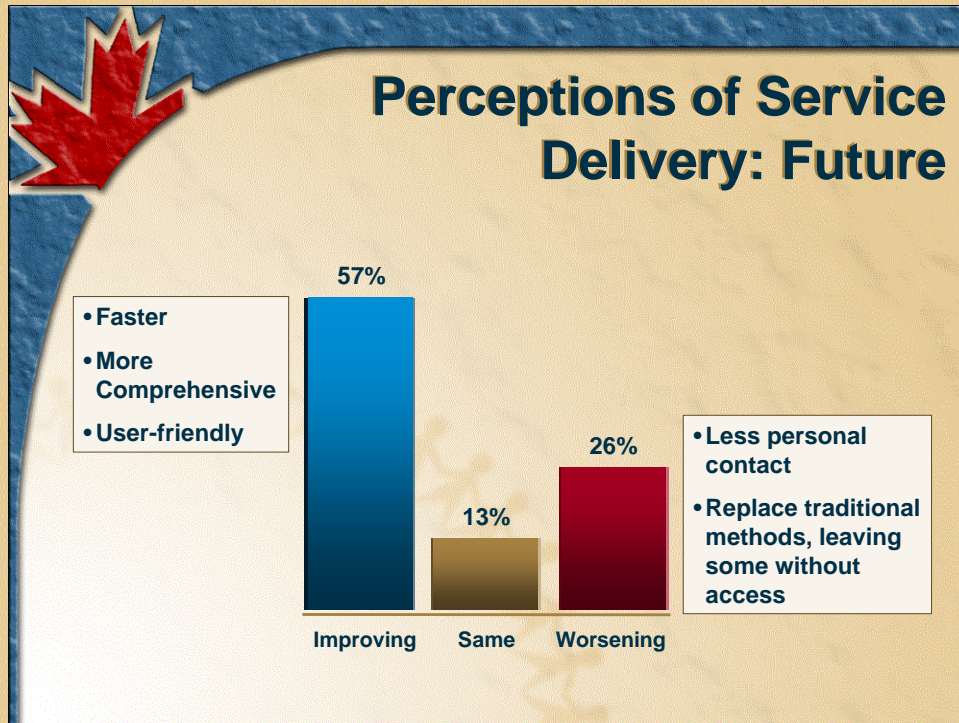
By Province (%)

	BC	AB	SK	MB	ON	QC	NB	NS	ATL	Total
Improving	54	52	48	54	56	64	64	52	61	57
Worsening	28	29	37	26	27	20	24	30	24	26
Same	13	15	11	15	12	13	10	15	12	13

By Age (%)

	18-24	25-34	35-54	55+	Total
Improving	72	60	56	52	57
Worsening	17	25	28	26	26
Same	8	12	12	17	13

Perceptions of Service Delivery: Future



- Looking to the future, 57% believed government service would improve, while 26% believed it would worsen.
- Focus groups suggest that both of these perceptions are being driven in part by the Internet.
- People fear the Internet will lead to less personal contact with the Government. They are also concerned that the Internet will replace traditional methods of service delivery, and leave certain segments of the population without access to government services.
- However, Canadians are also optimistic about the Internet because of its ability to deliver faster, more comprehensive, user-friendly service.

Perceptions of Service Delivery Methods

“Now I’d like you to consider each of the methods you could use to contact the Government of Canada, and rate them one by one across a series of dimensions. How would you rate [in-person service centres] [the telephone] [the Internet] [the mail] in terms of providing [fast service] [personalized service] [accessible service], where 7 would be very good and 1 would be very bad.”

In-person Service Centres (%)

	Fast service	Personalized service	Accessible service
Good (5,6,7)	41	49	48
Neither (4)	25	22	25
Bad (1,2,3)	20	15	15
Don’t know	13	13	13

Telephone (%)

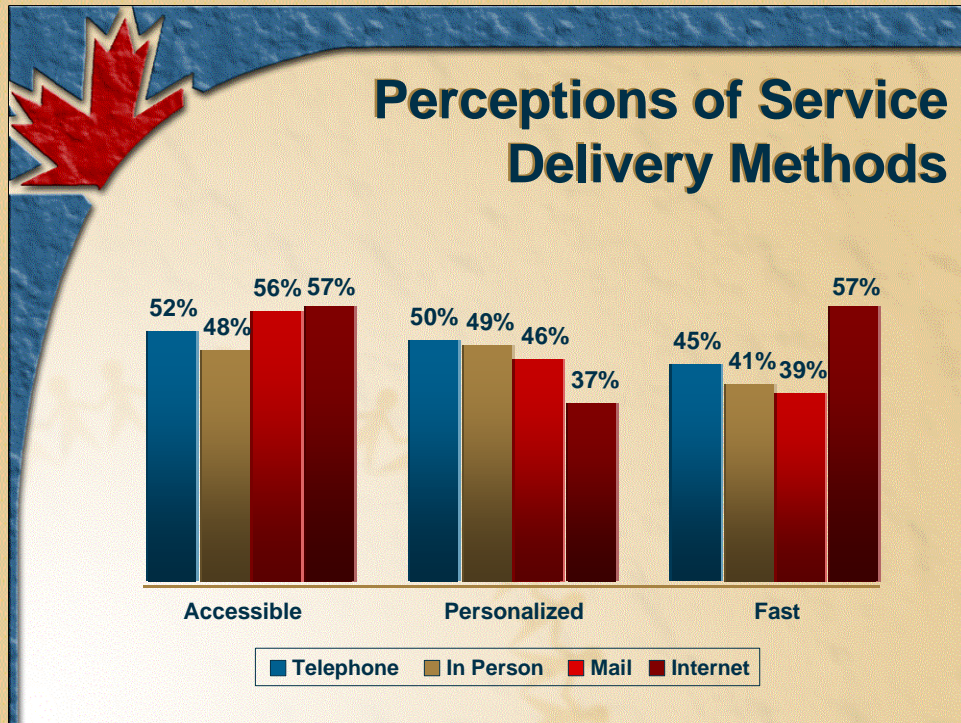
	Fast service	Personalized service	Accessible service
Good (5,6,7)	45	50	52
Neither (4)	19	19	19
Bad (1,2,3)	31	27	24
Don’t know	4	4	4

Internet (%)

	Fast service	Personalized service	Accessible service
Good (5,6,7)	57	37	57
Neither (4)	12	19	12
Bad (1,2,3)	7	19	7
Don’t know	24	25	24

Mail (%)

	Fast service	Personalized service	Accessible service
Good (5,6,7)	39	46	56
Neither (4)	22	24	23
Bad (1,2,3)	35	25	18
Don’t know	4	4	4



- All respondents were asked to consider a range of methods they could use to contact the Government of Canada, and to rate them one by one across a series of dimensions – fast service, personalized service and accessible service.
- The telephone received good ratings for providing accessible and personalized service, and lower ratings for fast service.
- Respondents also perceived in-person service centres as providing relatively personalized service. However, service centres received lower marks than the telephone and the Internet for fast service.
- Mail service was perceived as being accessible. However, the mail received the lowest ratings of all methods when it came to providing fast service.
- The Internet received the highest ratings of all service delivery methods for providing accessible and fast service. Conversely, it received the lowest ratings for personalized service.

Preferred Method of Contact

“Would you have preferred to contact the Government of Canada in another way?”

	BC	AB	SK	MB	ON	QC	NB	NS	ATL	Total
Yes (%)	20	13	22	16	22	11	16	20	17	18
No (%)	79	86	77	84	78	87	84	78	82	81

“How would you have preferred to contact the Government of Canada?”

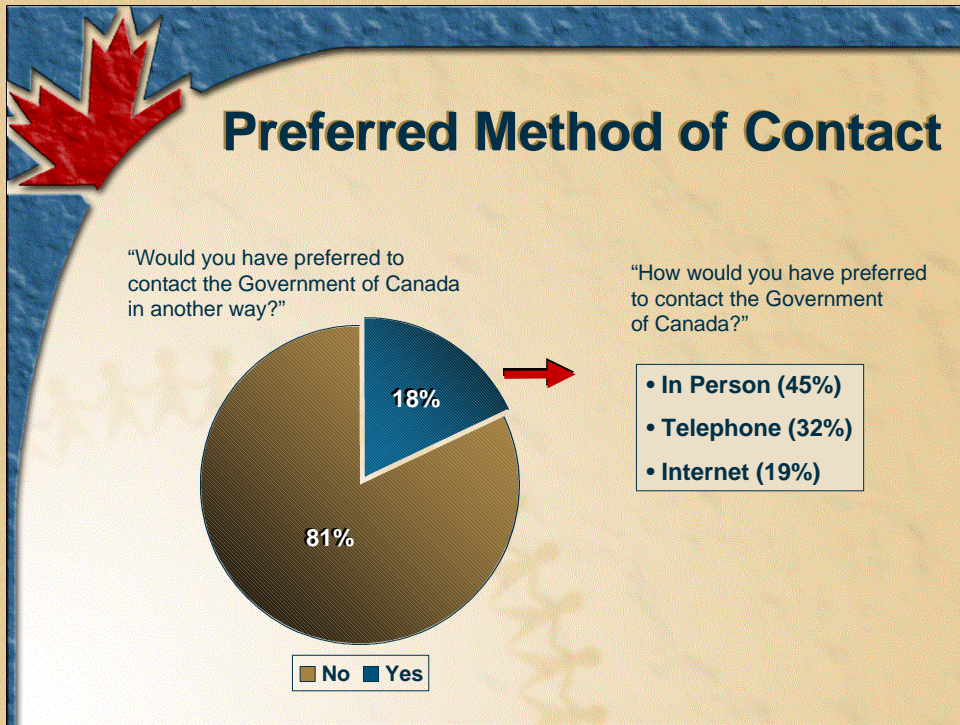
In person	45%
Telephone	32%
Internet	19%
Other	6%

“Why do you say you would have preferred to contact the Government of Canada [in person] [by telephone] [by Internet]?”

	In person	Telephone	Internet
Prefer talking one-on-one (%)	22	15	N/A
Ability to see the person I'm talking to (%)	15	N/A	N/A
Avoid automated systems (%)	19	21	11
Faster service (%)	11	21	46
More likely to get information (%)	13	9	8
Easier to find information (%)	11	16	7
Convenience (%)	--	--	10

-- too small to be released

N/A not applicable



- Canadians who had contacted the Government in the three months before the survey were asked if they would have preferred to do so in another way. Eighty-one per cent were satisfied with the method they had used.
- Of the 18% who would have preferred to contact the Government in another way, most (45%) would have preferred in-person service. Reasons for preferring in-person service included wanting to speak with a person one-on-one and wanting to avoid automated telephone systems.

Future Method of Contact

“In the future, do you think you will have more contact, less contact, or about the same amount of contact with the Government of Canada using: 1) the telephone, 2) the Internet, 3) 1 800 numbers, 4) in-person service outlets, 5) mail, and 6) computerized kiosks?”

	Internet	1 800 #'s	Computerized kiosks	Telephone	Mail	In person
% saying more contact	43	24	22	20	13	12
% saying less contact	17	16	26	18	27	30
% saying about the same	33	57	42	61	59	54

(% saying more contact)

By Province

	BC	AB	SK	MB	ON	QC	NB	NS	ATL	Total
Internet	49	46	41	38	47	34	42	37	39	43
1 800 numbers	24	27	20	26	26	20	22	22	22	24
Computerized kiosks	22	21	18	19	27	17	24	17	21	22
Telephone	18	18	20	22	22	18	22	17	19	20
Mail	12	11	12	12	13	12	15	12	14	13
In person	14	9	9	10	13	10	14	10	13	12

By Age

	18-24	25-34	35-54	55+	Total
Internet	61	55	45	23	43
1 800 numbers	25	23	26	22	24
Computerized kiosks	35	29	22	11	22
Telephone	23	21	20	17	20
Mail	20	12	11	11	13
In person	15	12	11	10	12

January 2001:

Priorities for On-line Services

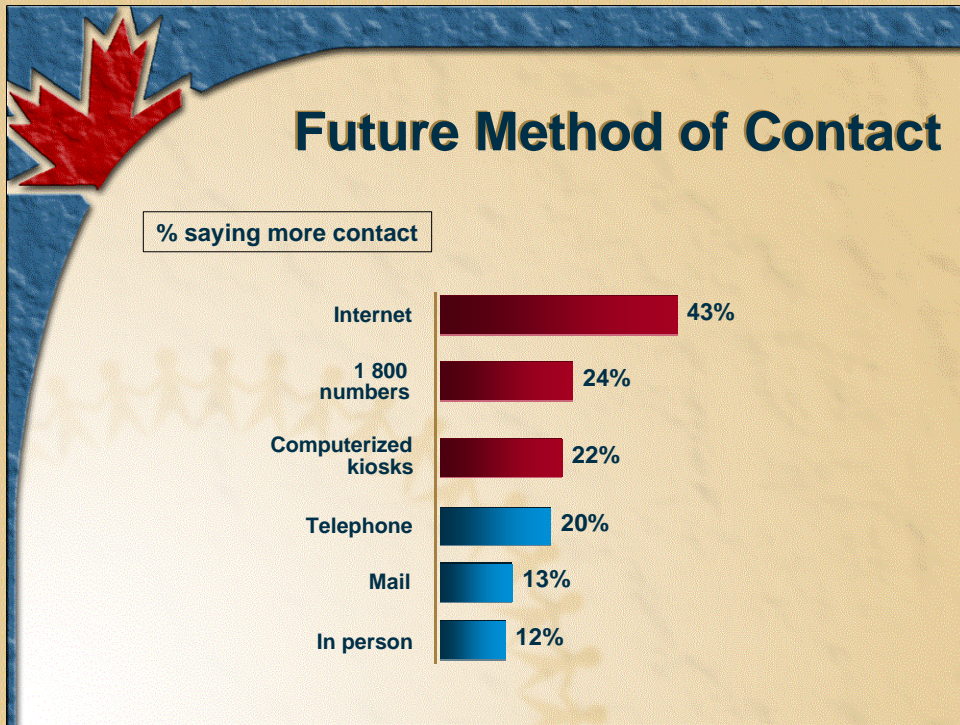
Top 5 priorities

1) Filing income taxes	61%
2) Registering opinion	56%
3) Participating in a survey	56%
4) Voting in an election	53%
5) Registering for an election	51%

Priorities for On-line Information

Top 4 priorities:

1) Local Government of Canada programs and services	60%
2) Job search	54%
3) E-mail government officials	54%
4) Career information	54%



- In the future, Canadians expect to have more contact with the Government using electronic methods such as the Internet, 1 800 numbers and computerized kiosks.
- Our earlier surveys have indicated that Canadians want the Internet to serve as a means of two-way communication between Canadians and the Government: more than half would like to participate in government surveys on-line and to e-mail government officials.
- Our data and focus groups also suggest that, for the near future, personalized service from the Government of Canada will remain important. Regardless of changing technology, Canadians will continue to want a person available to answer their questions.

Improving Service through the Internet

“Do you think the Internet will improve, worsen or have no impact on how Canadians receive service from the Government of Canada?”

By Age (%)

	18-24	25-34	35-54	55+	Total
Improve	85	82	80	66	77
Worsen	3	2	4	4	3
Same	10	15	13	15	13
Don't know	2	2	4	16	6

By Education (%)

	< High school	High school	Post-secondary	University	Total
Improve	51	74	79	82	77
Worsen	6	3	3	3	3
Same	18	14	13	12	13
Don't know	25	8	4	3	6

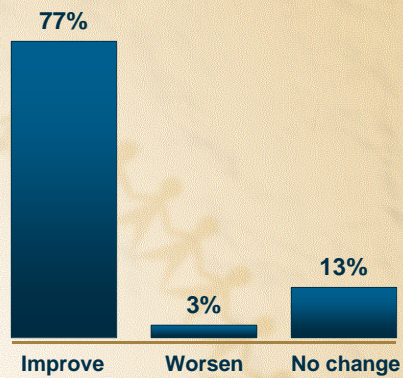
By Type of User (%)

	Users	Non-users	Total
Improve	84	63	77
Worsen	2	5	3
Same	12	16	13
Don't know	2	16	6

By Income (%)

	< \$30K	\$30K to \$59K	\$60K+	Canada
Improve	67	80	83	77
Worsen	4	3	2	3
No change	16	12	13	13
Don't know	12	5	2	6

Improving Service through the Internet



- The great majority of Canadians, 77%, believed the Internet would improve service delivery in the future.
- While enthusiastic about the Internet, older Canadians (66%), low income earners (67%) and those with less than high school education (51%) were less likely to believe the Internet would improve service delivery.
- However, the expectation of improving service was higher among those under 55, high income earners (83%), university graduates (82%), and Internet users (84%).
- Those who rated government service quality good (84%), and those who gave a higher approval evaluation to the Government in general (82%) also assessed the Internet's potential impact on service delivery positively.

Internet Usage

“Do you have access to the Internet?”

(% saying yes)

Fall 2000	Winter 2001	Spring 2001
65	63	67

(% saying yes)

By Province

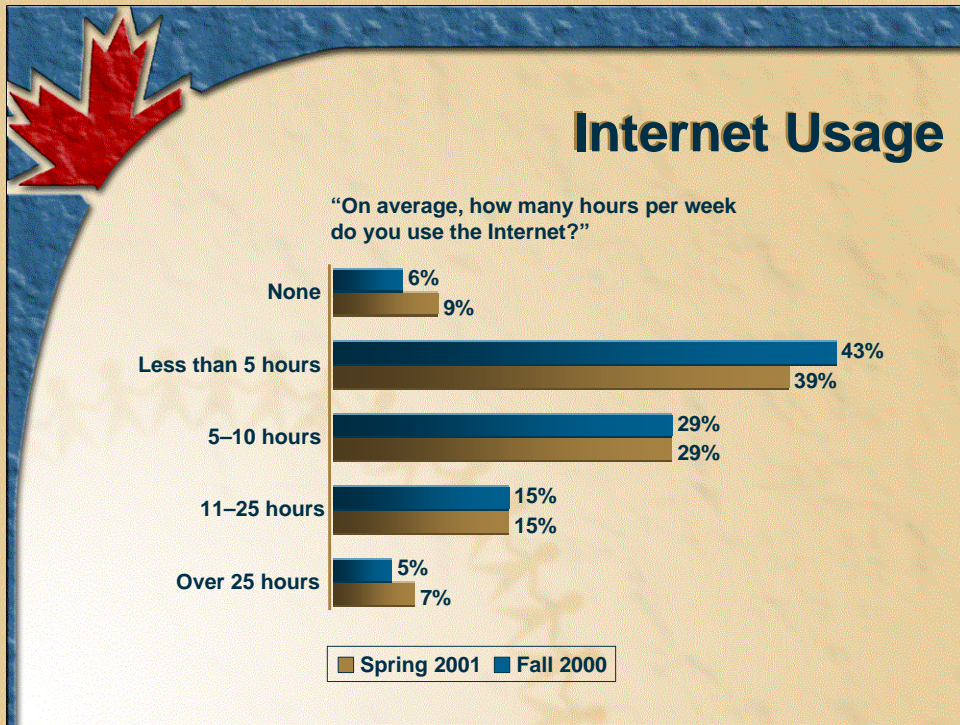
Fall 2000									
BC	AB	SK	MB	ON	QC	NB	NS	ATL	Total
71	70	59	58	70	55	57	68	62	65

Winter 2001									
BC	AB	SK	MB	ON	QC	NF	PE	ATL	Total
73	67	56	57	70	52	50	55	54	63

Spring 2001										
BC	AB	SK	MB	ON	QC	NB	NS	ATL	TERR	Total
75	70	64	61	71	57	63	65	64	84	67

“On average, how many hours per week do you use the Internet?”

	Fall 2000	Winter 2001	Spring 2001
Average number of hours	7.9 hours/week	9.1 hours/week	9.1 hours/week



- After a brief levelling off in January 2001, access to the Internet continues to increase.
- Among those with Internet access, there has been an increase in the average number of hours per week spent on-line.
- In spring 2001, Canadians with Internet access were spending, on average, 9.1 hours per week on the Internet. This is up from 7.9 hours in fall 2000.

Awareness of 1 800 O-Canada

“Would you say you are very aware, somewhat aware, not very aware or not at all aware of the Government of Canada’s main toll free number 1 800 O-Canada?”

By Income (%)

	Fall 2000				Spring 2001			
	< \$30K	\$30-\$59K	\$60K+	Canada	< \$30K	\$30-\$59K	\$60K+	Canada
Aware	39	32	27	32	40	32	28	33
Not aware	61	68	73	68	59	68	72	67

By Gender (%)

	Fall 2000			Spring 2001		
	Male	Female	Canada	Male	Female	Canada
Aware	31	33	32	29	37	33
Not aware	69	67	68	71	63	67

By Education (%)

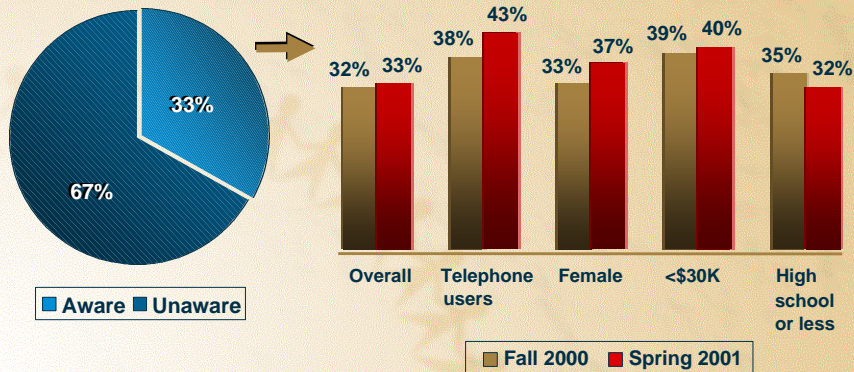
	Fall 2000				Spring 2001			
	High school or less	Post-secondary	University	Canada	High school or less	Post-secondary	University	Canada
Aware	35	32	28	32	32	33	33	33
Not aware	65	68	72	68	67	67	67	67

“Thinking about your most recent experience, how did you contact the Government of Canada? Did you contact the Government of Canada by telephone?”

	% who contacted the Government by telephone in their most recent contact
By Income	
< \$30K	79
\$30K-\$59K	74
\$60K+	67
By Gender	
Male	70
Female	76
By Education	
High school or less	80
Post-secondary	74
University	71
Total	73

Awareness of 1 800 O-Canada

% who are aware: by demographics



- Overall, there has been no increase in the level of awareness of the 1 800 number since fall 2000.
- However, among those who used the telephone to contact the Government, awareness has increased from 38% in fall 2000 to 43% in spring 2001.
- Awareness of the toll-free number has also increased among females and among those making less than \$30,000 per year. These two groups were also more likely to use the telephone to contact the Government of Canada.
- The one notable exception is those with less formal education. These Canadians were less likely to be aware of the 1 800 number.

Awareness of Government Web Site

“Would you say you are very aware, somewhat aware, not very aware or not at all aware of the Government of Canada’s web site called www.canada.gc.ca?”

By Education (%)

	High school or less	Post-secondary	University	Canada
Aware	18	40	53	38
Not aware	81	60	47	62

By Income (%)

	< \$30K	\$30K-\$59K	\$60K+	Canada
Aware	28	40	46	38
Not aware	71	60	54	62

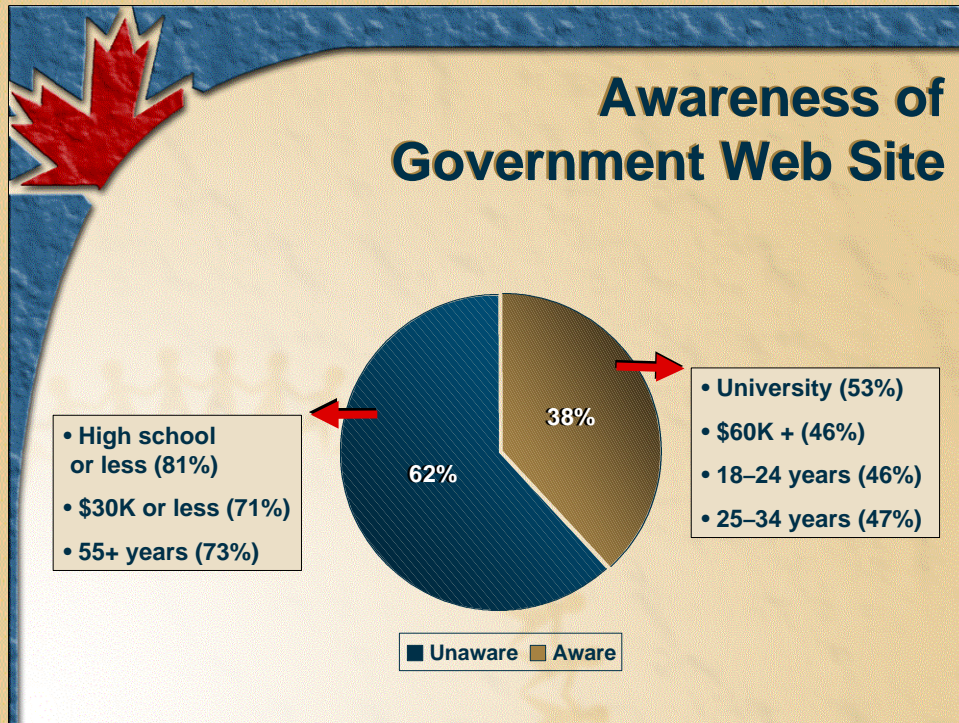
By Age (%)

	18-24	25-34	35-54	55+	Canada
Aware	46	47	40	25	38
Not aware	54	53	60	73	62

Type of Internet User (%)

	Non-user	User	Canada
Aware	14	50	38
Not aware	85	50	62

Awareness of Government Web Site



- Awareness of the Government's main web site is higher than awareness of the toll-free number, at 38% and 33% respectively.
- As with the 1 800 number, awareness of the web site is higher among the user community, in this case, university graduates, those with higher incomes and younger Canadians. Of those who used the Internet in their most recent contact with the Government, fully 81% were aware of the site.

Visits to Government of Canada Web Sites

“Have you visited any Government of Canada web sites in the past three months?”

(% saying yes)

By Province

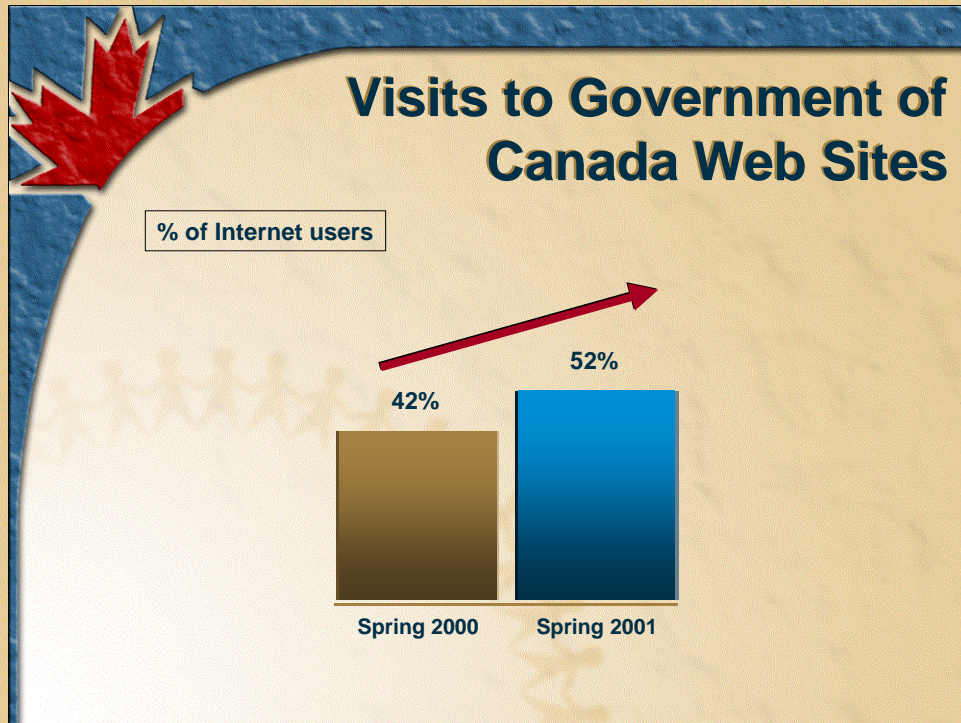
	BC	AB	SK	MB	ON	QC	ATL	Total
Spring 2000	37	45	42	37	44	41	38	42
Spring 2001	52	49	57	45	53	51	56	52

By Gender

	Male	Female	Total
Spring 2000	45	38	42
Spring 2001	57	47	52

By Education

	High school or less	College	University	Total
Spring 2000	33	37	51	42
Spring 2001	28	51	61	52



- Over half of Canadians who used the Internet in the three months before the survey visited a government web site. In the 12 months from spring 2000 to spring 2001, the number has gone from 42% to 52%.
- This is partially due to the increase in Internet access. It also comes at a time when government advertising is promoting the three service channels, including the Government of Canada web site.

Conclusion

This survey reveals above all a shifting public environment.

In spring 2001, Canadians were less optimistic about the short-term prospects for the economy than they were in spring 2000. This lower level of optimism has negatively impacted the Government's performance assessment on managing the economy and its overall performance assessment.

Canadians gave higher priority to the environment, food safety and Canadian unity. In contrast, the priority accorded to taxation declined. Top-of-mind mentions of health care also declined.

There were increased performance evaluations in a number of areas including the environment, food safety, crime and justice, promoting trade, and farm income.

Management of the economy and service ratings appear to be the most important drivers of the Government's overall performance evaluation.

For the most part, Canadians were satisfied with the service they received from the Government of Canada. They contacted the Government by their method of choice and the information they received met all or part of their needs.

Awareness of the 1 800 number is increasing among those who use the telephone to contact the Government.

Awareness of the Government's main web site is also higher among those who use the Internet to contact the Government.

The Internet is driving Canadians' expectations of improving service delivery in the future, and is part of the reason they believe government service has improved over the past five years. However, focus groups suggest that Canadians are concerned about people without Internet access and the ability of these people to access services. Therefore, in the near future, regardless of changing technology, personal service via the mail, telephone and in person will remain important to Canadians.

The Survey: Wave IX

- Total sample: 4,704 adults aged 18 and over.
- Maximum margin of error for the total sample for Canada at a 95% confidence interval: 1.5%.
- Oversampling done in Saskatchewan, Manitoba, Nova Scotia, New Brunswick, Prince Edward Island, Newfoundland, and the territories.
- Interviewing conducted by telephone by the firms Ipsos-Reid and GPC Communications between May 2 and May 13, 2001.

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	Oversampling (number of persons)
Territories	0.3	14	200	+/-6.9%	186
BC	12	566	451	+/-4.7%	
AB	9.3	437	350	+/-5.3%	
SK	3.6	169	320	+/-5.6%	151
MB	4.1	193	320	+/-5.6%	127
ON	37.7	1773	1162	+/-2.9%	
QC	25.2	1185	901	+/-3.3%	
NB	2.6	122	400	+/-5.0%	278
NS	3.0	141	400	+/-5.0%	259
PE	0.4	19	100	+/-10.0%	81
NF	1.8	85	100	+/-10.0%	15
ATL	(7.8)	(367)	(1000)	+/-3.1%	(633)
Total	100	4704	4704	+/-1.5%	

In addition to the spring communications survey, the CIO conducted four sets of focus groups in May 2001 to add further insight into the quantitative analysis. French focus groups were conducted in Montréal and Moncton. English focus groups were conducted in Kingston and Edmonton. All groups were segmented on the basis of gender, age, education and employment status.