

UNDERSTANDING CANADIANS

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GAME CHANGERS



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Key Findings

- Canadians say they are optimistic, and seem to believe that “sunny days” are here. The largest increase in satisfaction over the past two years is with the way the government is running the country. Looking to the future, Canadians also feel that access to information and entertainment will be much better. Thank you Google and Netflix!
- General optimism aside, when we asked Canadians whether they thought owning a home, job security, having enough money to live well, and safety and retirement were better or worse for them than their parents generation, they were significantly more likely to say their parents had it better, and believe that their children will have it even worse. Add to this considerable angst over the overwhelming pace of change, concern about the environment and the clouds on the horizon start to look very grey.
- Fairness and equality (strong support for LGBTQ equality and equal pay) are the cornerstones of our current values and the views that knit our society together. But with the belief in future prosperity in decline we are also seeing lower social cohesion, and Canadians are increasingly focusing on themselves.
- Elites beware! We think the economy is rigged for the rich, we don’t think that governments are listening to us, and we would much rather rely on our own intuition and judgement than on the views of experts.

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Implications

- As Canada enters the Fourth Industrial Revolution, two trends are converging to create the greatest concern for today's governments: the Crisis of Elites and the Decline in Economic Optimism.
- Canadian governments are facing critical shifts: the automation of the labour market; an ageing population; shifting immigration patterns; and an economy that is growing slowly and transitioning in uncertain and somewhat unknown directions; as digital services, sharing apps and industry restructuring combine to reshape the economy.
- In the face of all this change, governments need to take bold steps today to get ahead of the curve. But being bold is risky and requires public trust and support, two things that governments increasingly lack.
- Canadians agree that something need to be done to address the environment and hold strong to the values of fairness and equality. Perhaps this one issue and these two values can form the foundation of government decisions and start the process of rebuilding an optimistic and trusting population.

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Implications... *continued*

- While Canadians are telling us that overall trust in “business” is low and customer service is viewed as impersonal, we also know that Canadians are much more likely to trust and value businesses they have personally chosen to deal with.
- It may be time for governments to trust the business community a bit more (as Canadians seem to do) when it comes to economic growth. Canadians also believe that business will deliver on the standard of products and services they promise.
- Longer term, the decline in economic optimism, a feeling of being overwhelmed by change, a desire to simplify our lives and an increased focus on oneself are key trends that business will need to consider as they position their products and services.
- Businesses aren’t immune from the crisis of elites and will suffer public backlash if they’re seen doing the wrong thing. Note recent public outcry related to issues of executive pay, air passenger rights, banking services upselling, and commercial products sales pitches framed within citizen protests.

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The Big Trends

- Little Economic Optimism = Pressure
- Change, Nostalgia and Simplification
- Crisis of the Elites
- iCanada (its all about me)
- Information Overload but... It is “My” Information
- Environment: High Concern, Low Expectations
- It is all about Being Fair and Equal
- The State of Businesses
- The State of Government

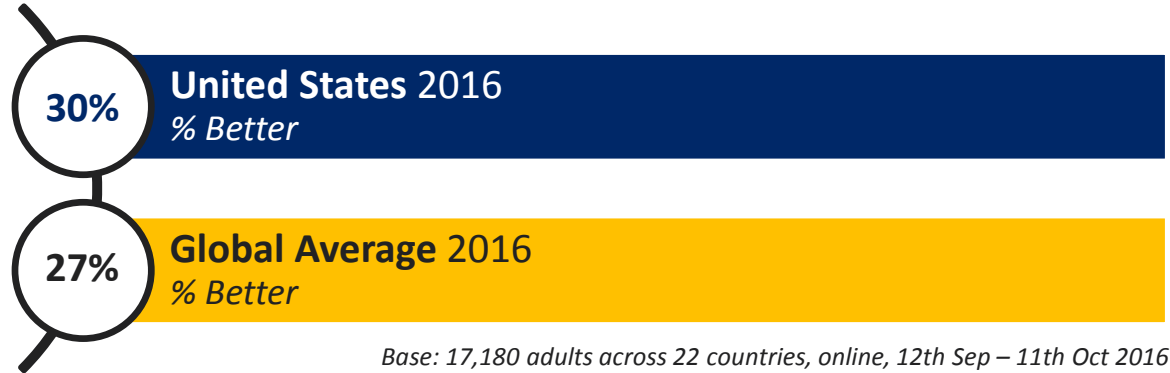
THE BIG TRENDS

Little Economic Optimism = Pressure



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Job security seen as significantly worse than parents' generation



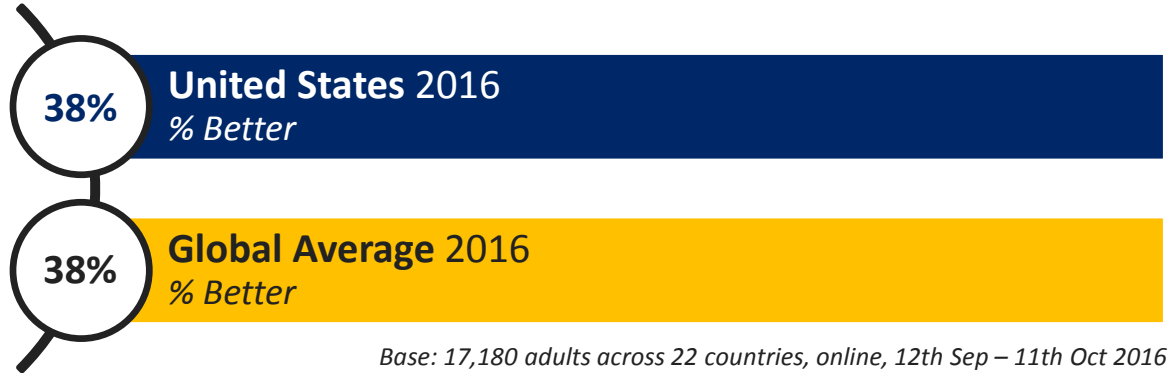
Which of these do you think is or will be better or worse for you than for your parents' generation?

Having a secure job



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Home ownership seen as significantly worse than parents' generation



Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

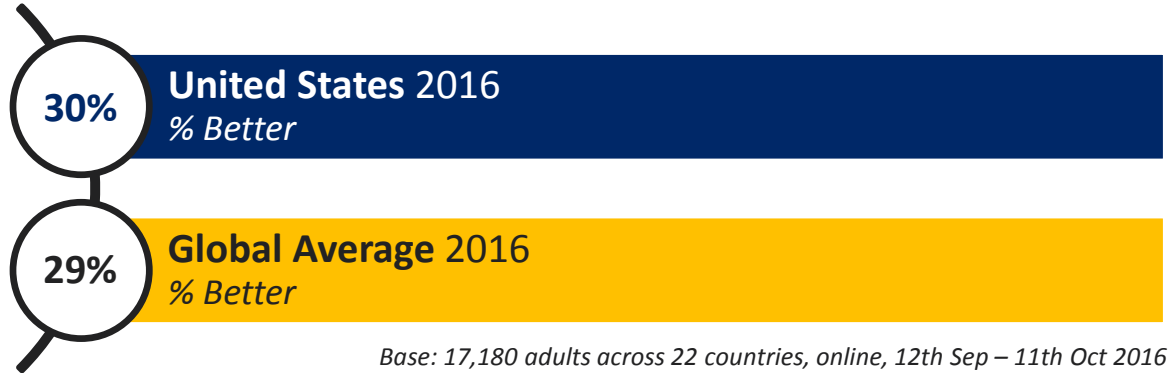
Which of these do you think is or will be better or worse for you than for your parents' generation?

Being able to own your own home



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Quality retirement seen as significantly worse than parents' generation



Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

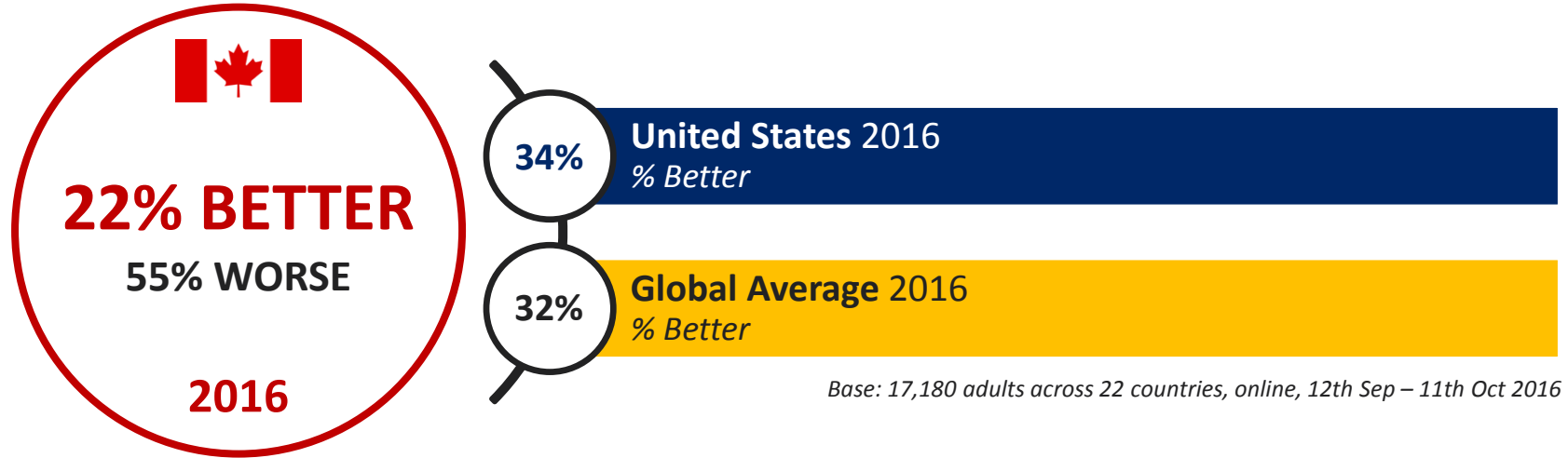
Which of these do you think is or will be better or worse for you than for your parents' generation?

Being able to live comfortably when you retire from work



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Canadians more skeptical than world and US about prospects for today's youth to have money to live well



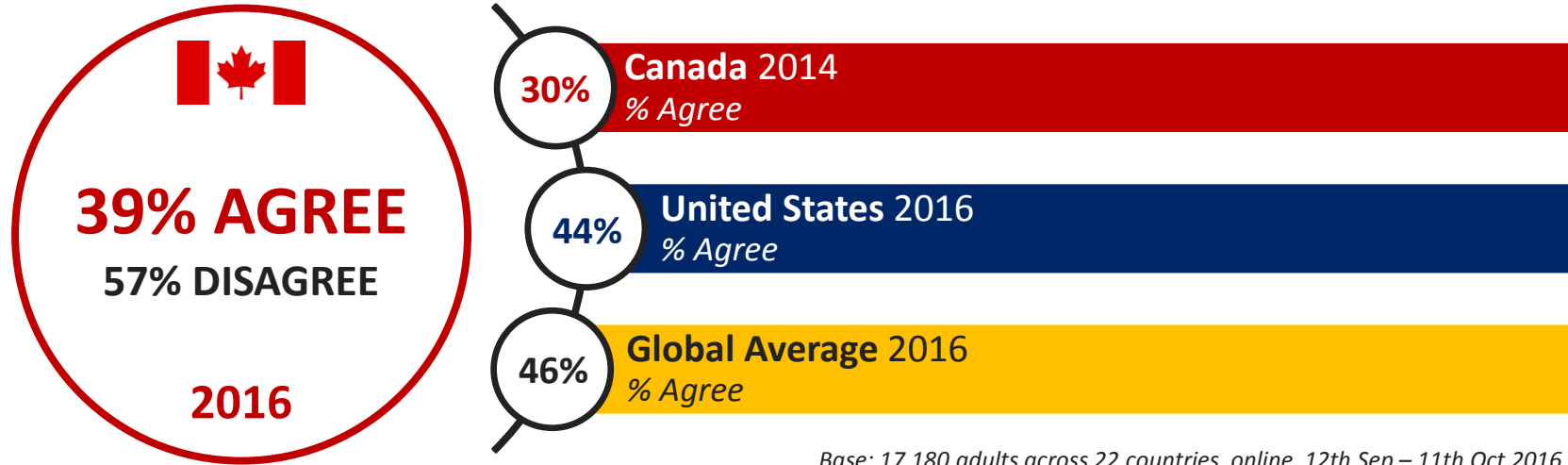
And which of these do you think is or will be better or worse for today's youth than for their parents?

Having enough money to live well



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Career becoming increasingly important for Canadians



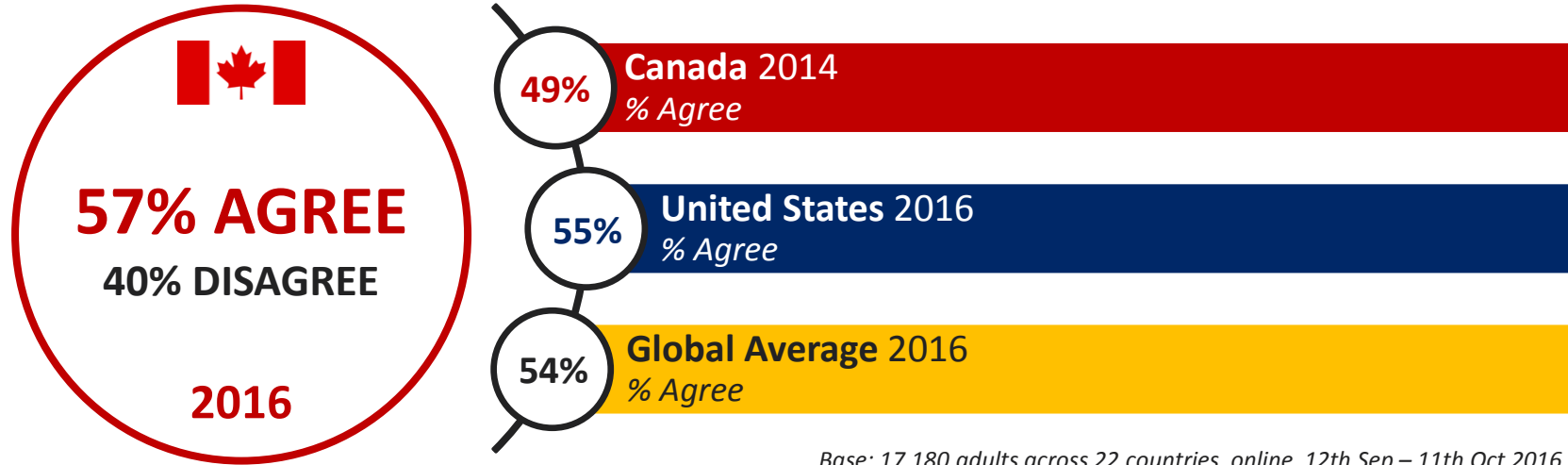
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

Fulfilment in life is achieving a prominent position in your career



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Canadians increasingly feeling pressure to succeed



Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

I feel under a lot of pressure to be successful and make money



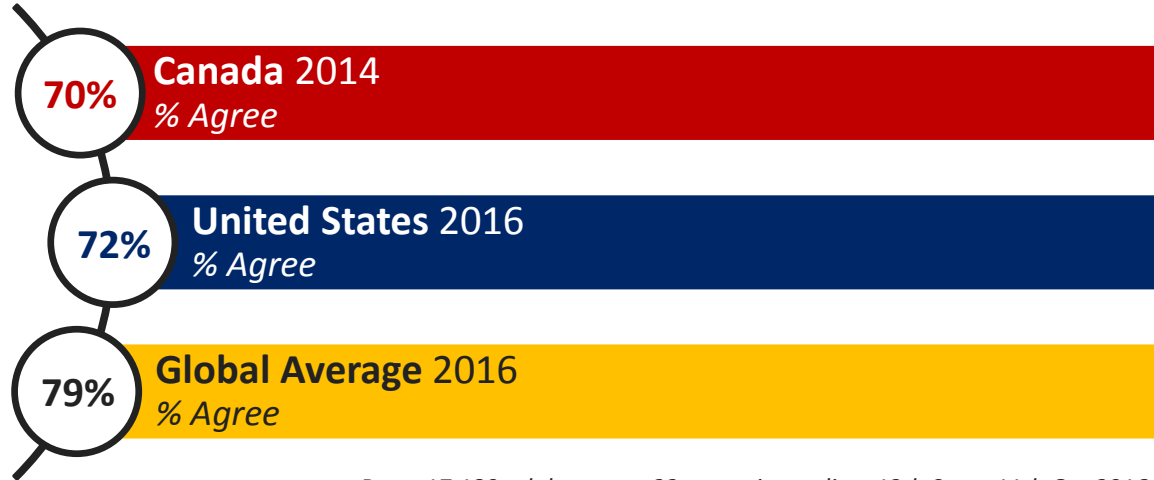
THE BIG TRENDS

Change, Nostalgia and Simplification



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Canadians believe the world is changing too fast



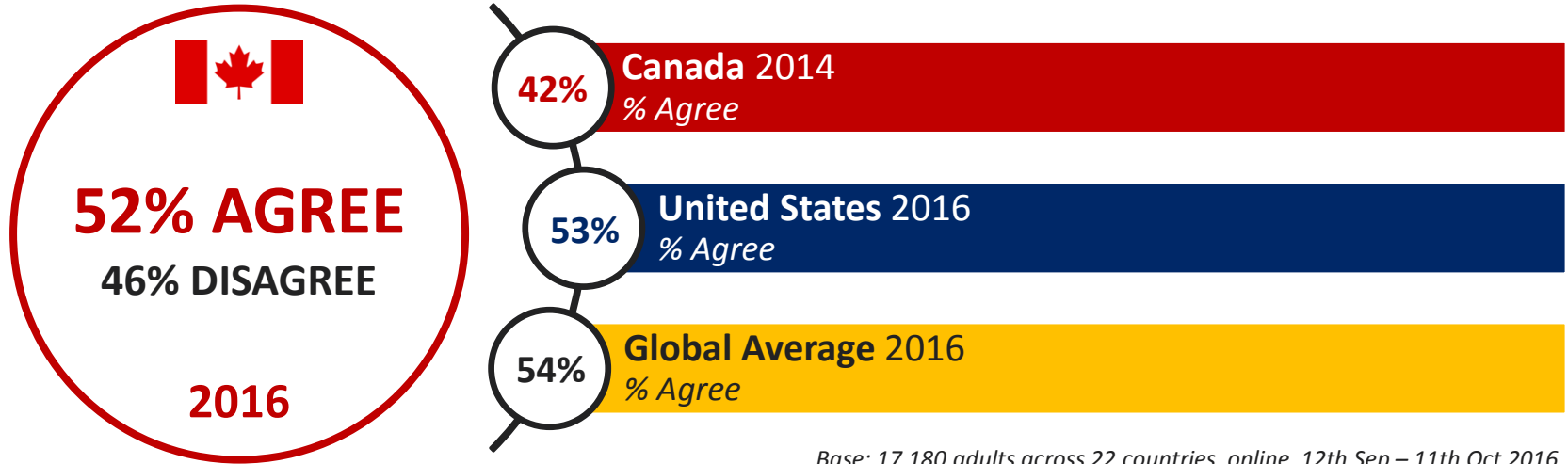
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

The world today is changing too fast



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Increasing sense of being overwhelmed among Canadians

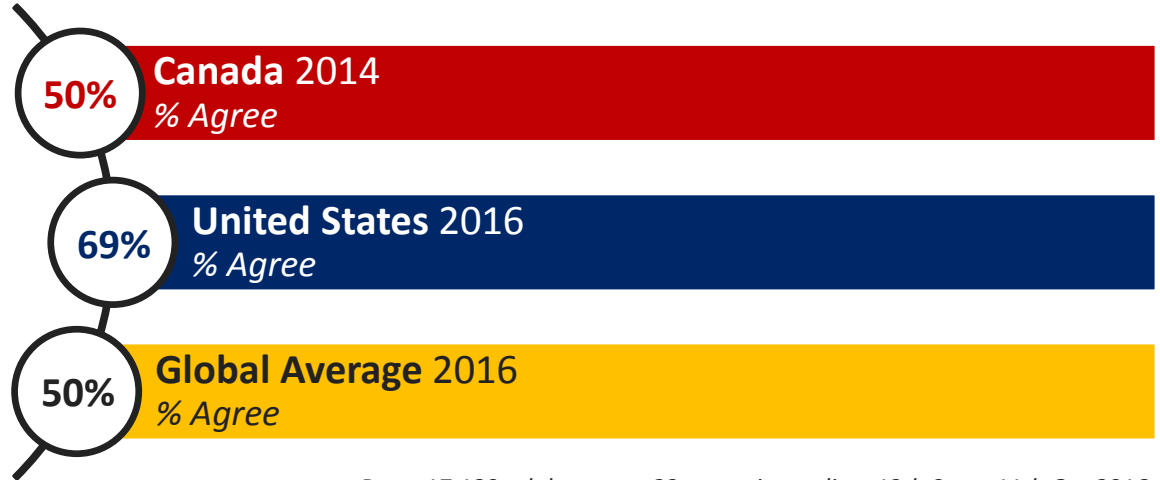


I often feel overwhelmed by all the choices I have about how to live my life



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While less than US, half of Canadians yearn for things to be like they were in the past



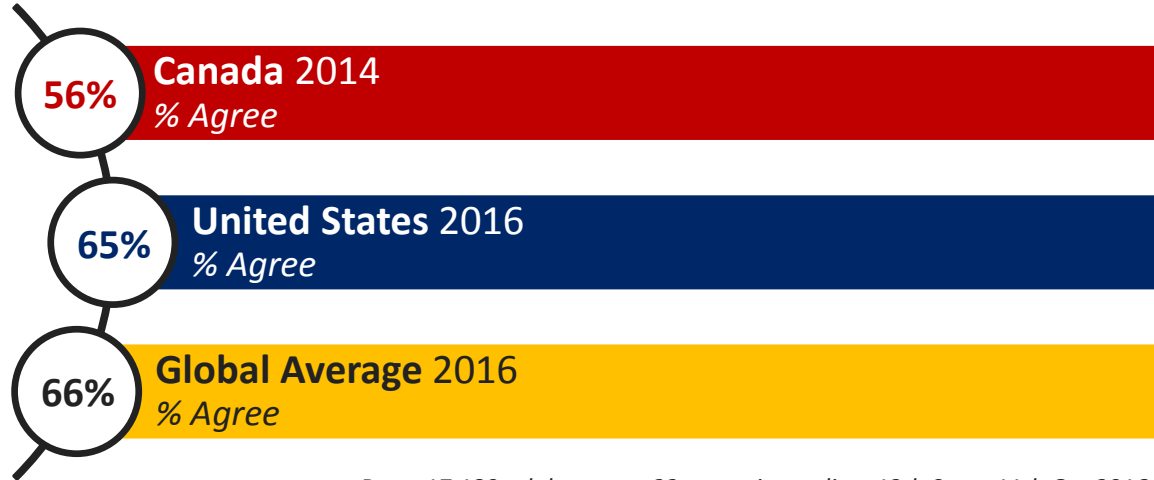
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

I would like my country to be the way it used to be



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Therefore, Canadians increasingly yearning for a simpler life



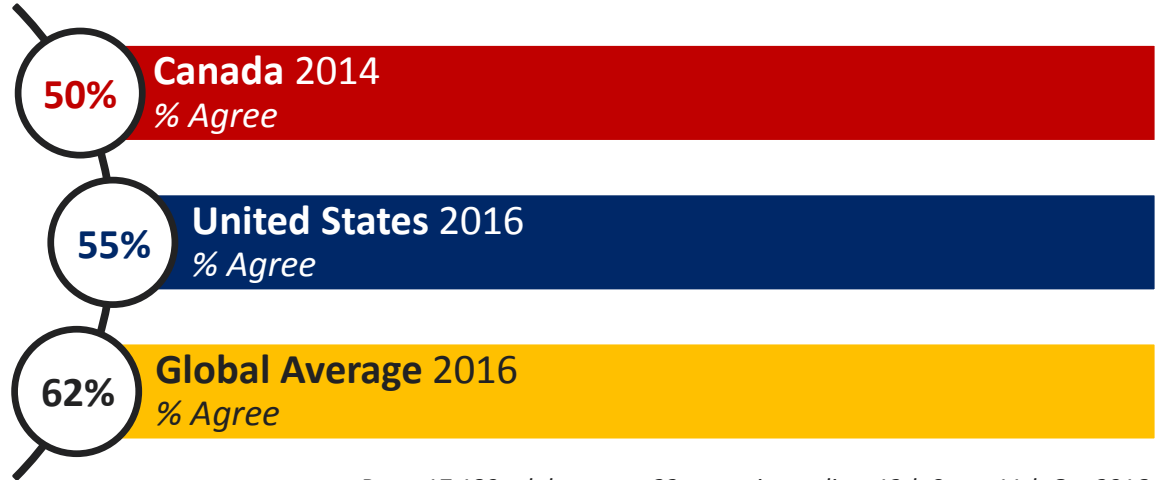
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

I wish my life was more simple



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And, Canadians increasingly yearning for a slower pace of life



Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

I wish I could slow down the pace of my life



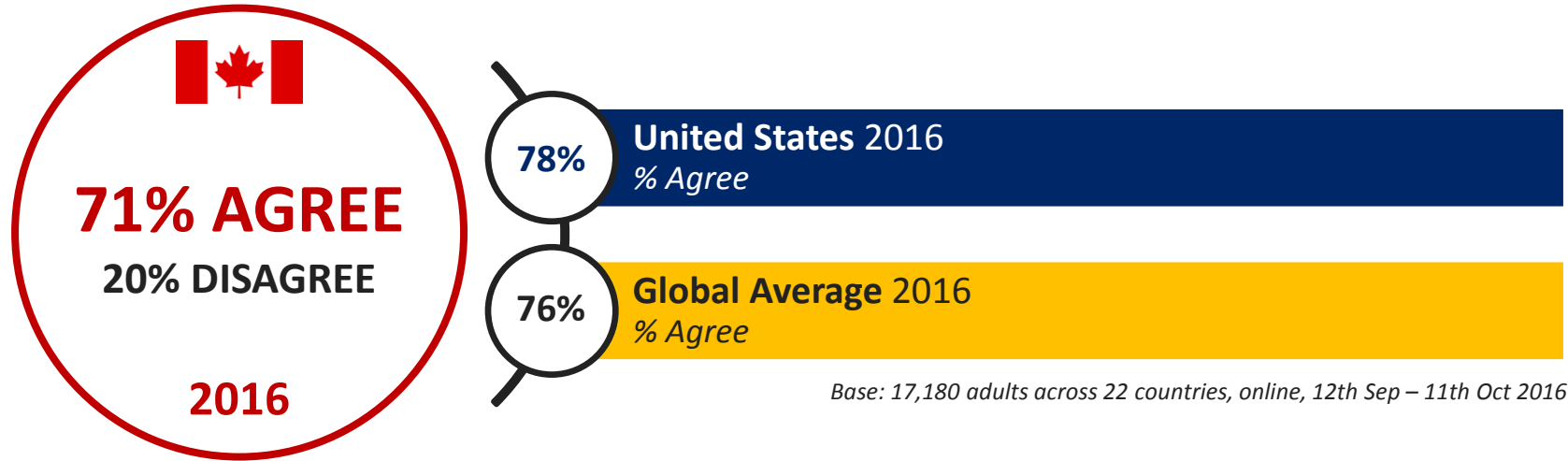
THE BIG TRENDS

Crisis of the Elites



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Canadians are slightly less likely than world and US in believing the economy is rigged, but strong majority do

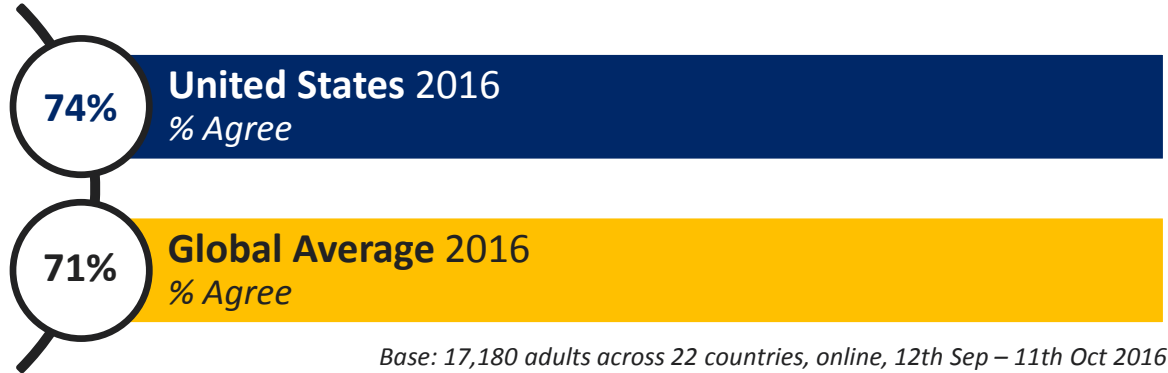


The economy of my country is rigged to advantage the rich and powerful



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Canadians question governments reflecting their priorities



Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

Our government does not prioritize the concerns of people like me



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Canadians prefer to make their own decisions



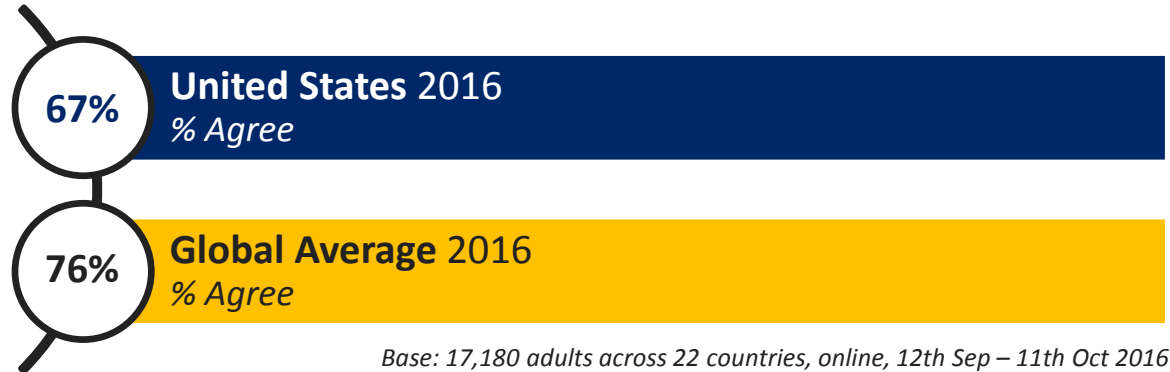
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

- A. I like to make choices myself
- B. I like to have experts make choices for me



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Canadians value self-determination



I want to get more autonomy in my life, and depend less and less on any external authority



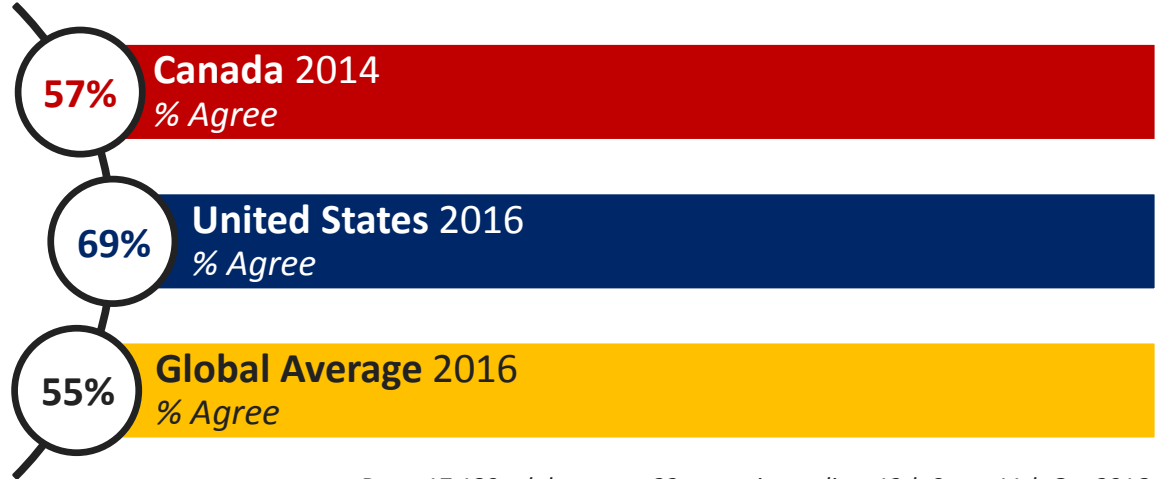
THE BIG TRENDS

iCanada (its all about me)



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Canadians increasingly focused on their own challenges over other people



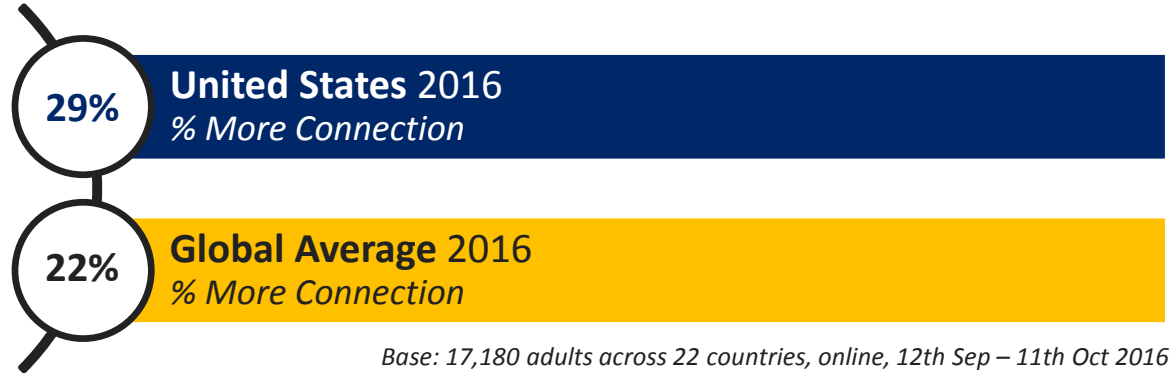
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

I have enough trouble worrying about my own problems without worrying about other people's problems



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Canadians feel more disconnected than connected to their neighbourhoods



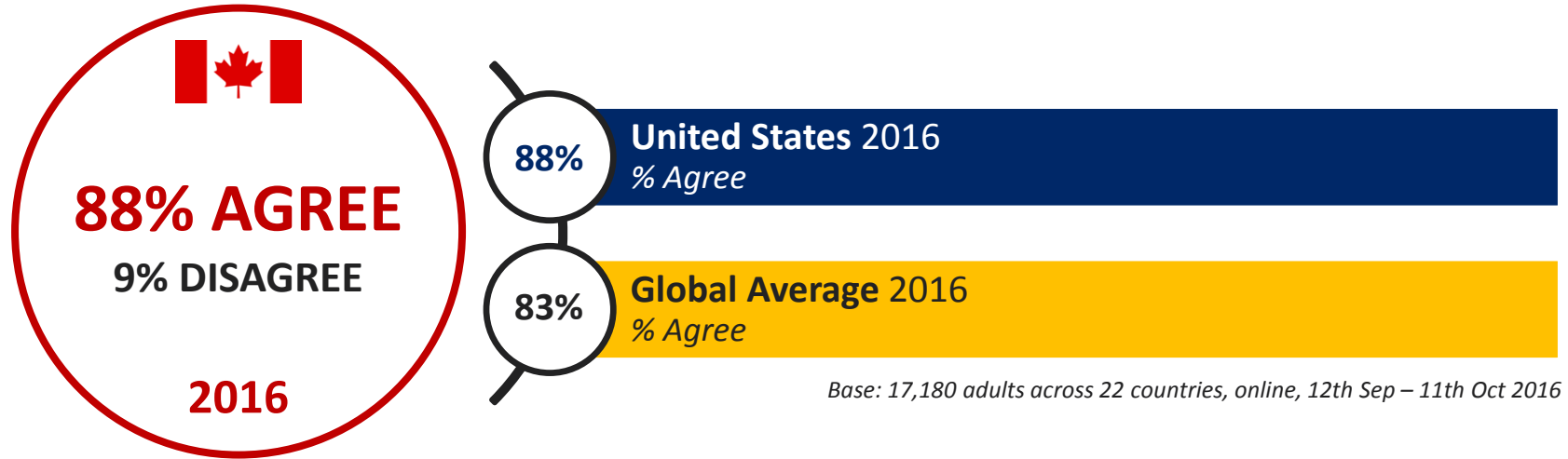
Which one of the following comes closest to your view:

I feel more/less of a connection with people in my neighbourhood than I did 10 years ago



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Canadians overwhelmingly see a need to trust personal intuition



Today it is vital to trust one's own intuition/judgement when making decisions



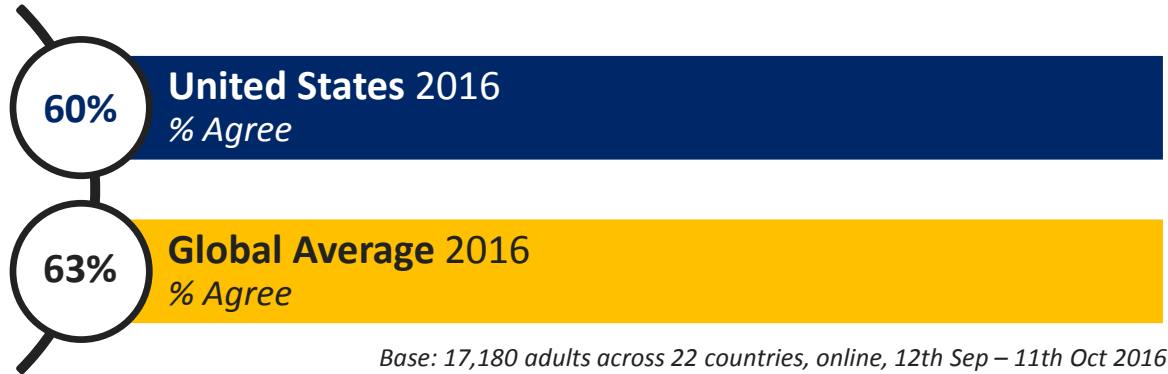
THE BIG TRENDS

Information Overload But... It is “*My*” Information



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Majority of Canadians think they spend too much time online



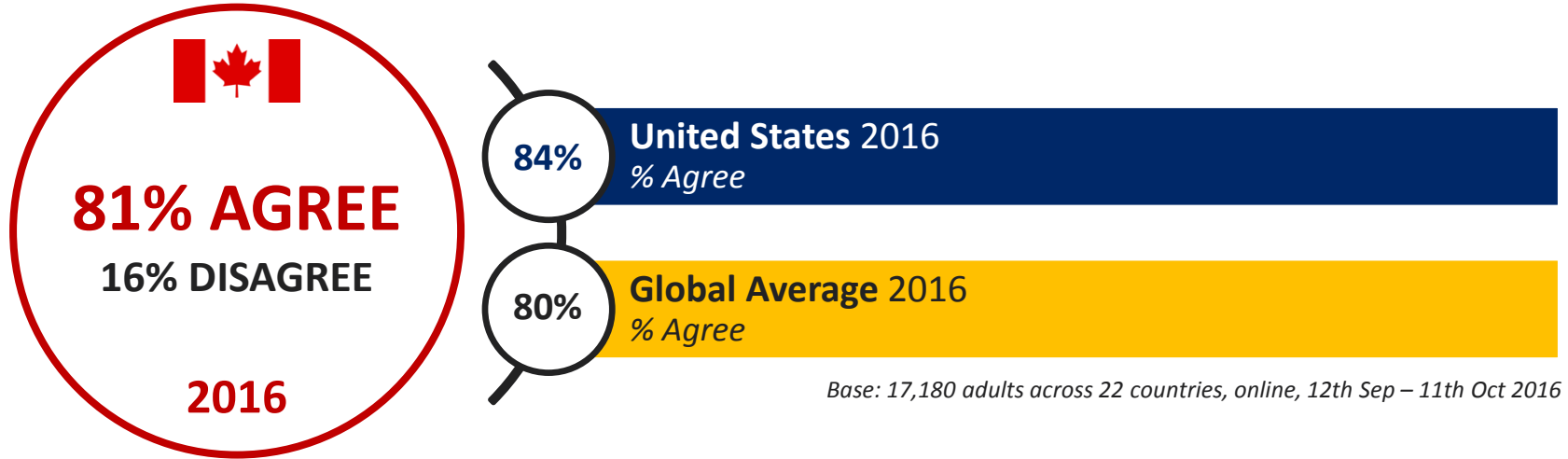
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

I spend too much time online / looking at screens



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Contradictory information a challenge for Canadians' trust

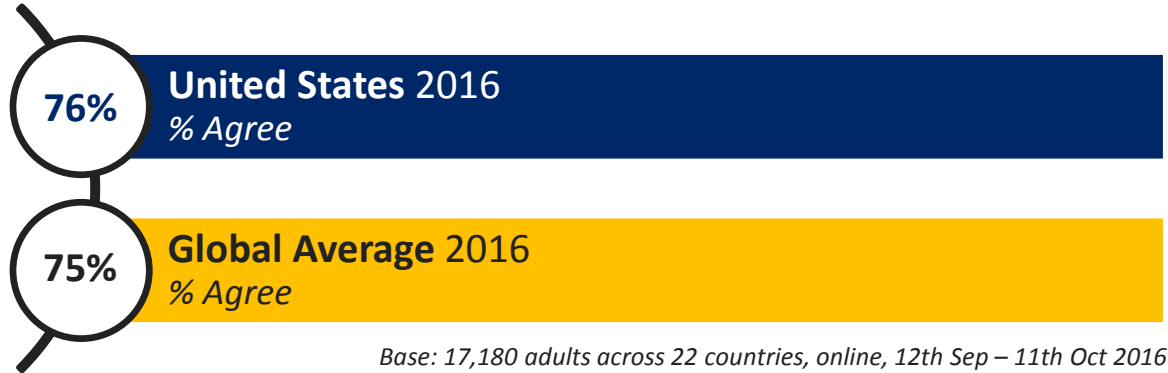


There is so much contradictory information that it is hard to know who or what to trust



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Three-quarters of Canadians try to regularly “shut themselves down”



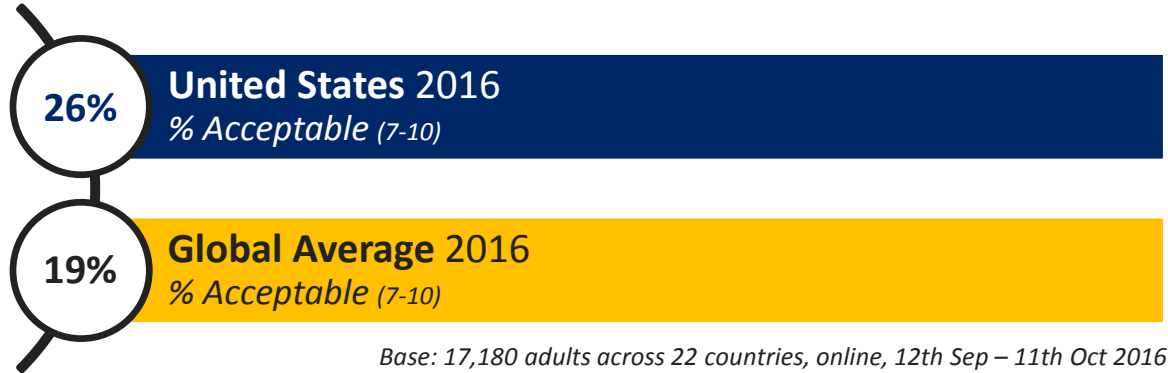
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

I try to find time to switch off on a regular basis



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Canadians find government monitoring of internet unacceptable



Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

Please indicate how acceptable or not you would find it if the government in [country] was allowed to do the following things to deal with a real and immediate threat of a terrorist attack without their/your consent?

Please give your answer on a scale of 0-10 where 0 means it is completely unacceptable and 10 means it is completely acceptable...

Monitor anyone's internet activity?



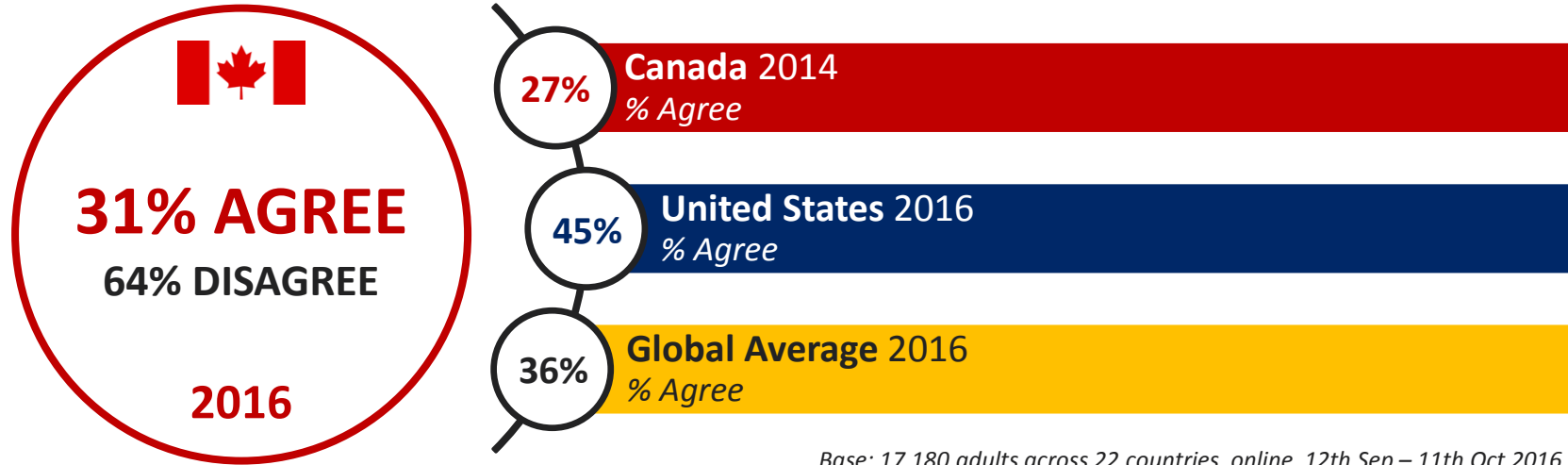
THE BIG TRENDS

Environment: High Concern, Low Expectation



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Canadians are not tired of hearing about environmental challenges



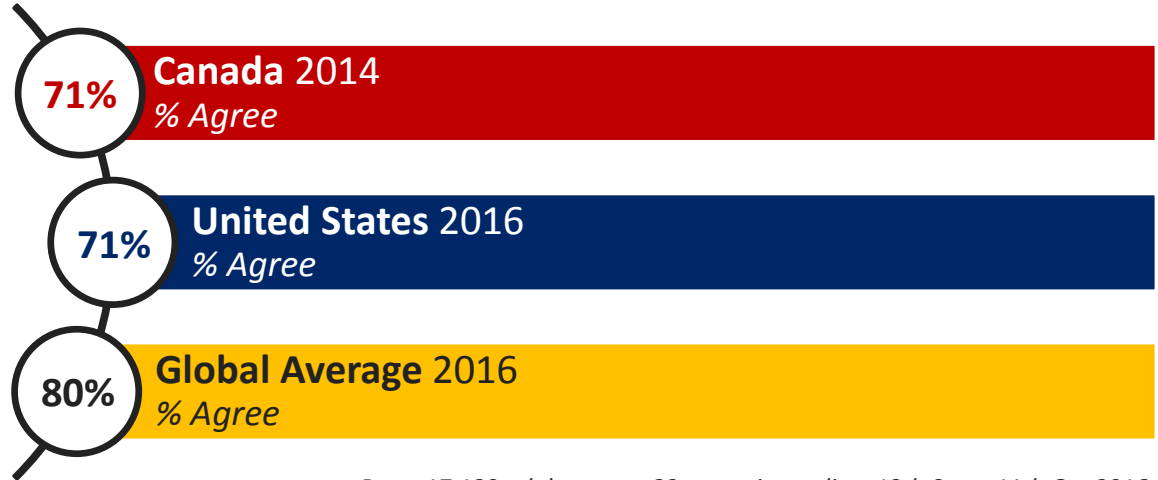
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

I'm tired of the fuss that is being made about the environment



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Canadians increasingly believe climate change is a result of human activity



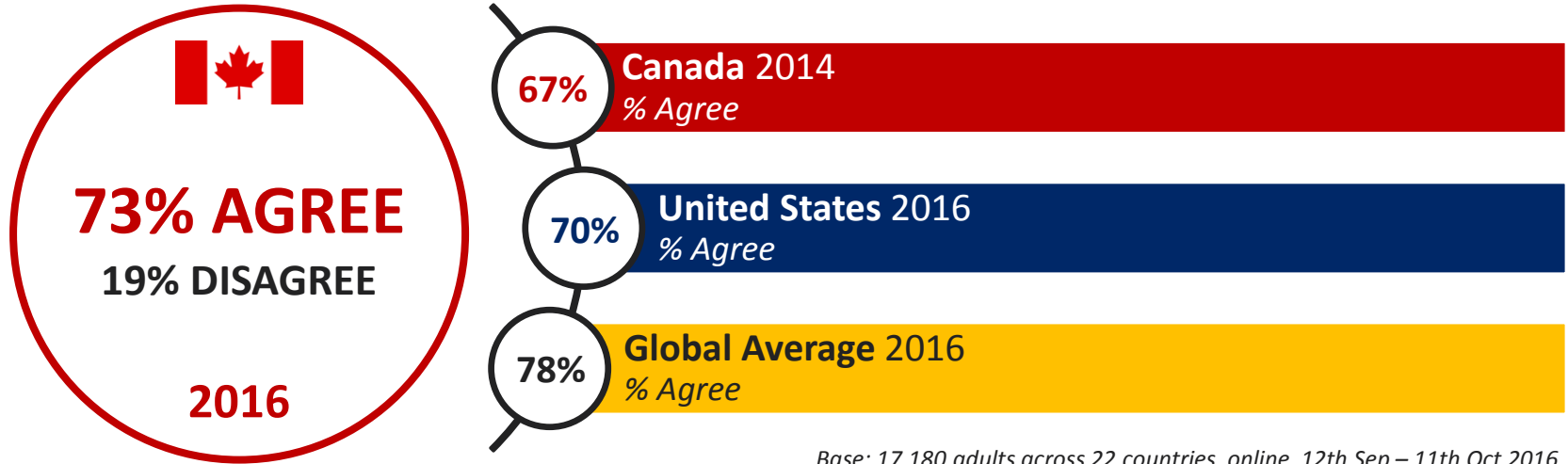
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

The climate change we are currently seeing is largely the result of human activity



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Canadians are fatalistic in the potential for environmental disaster



Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

We are heading for environmental disaster unless we change our habits quickly



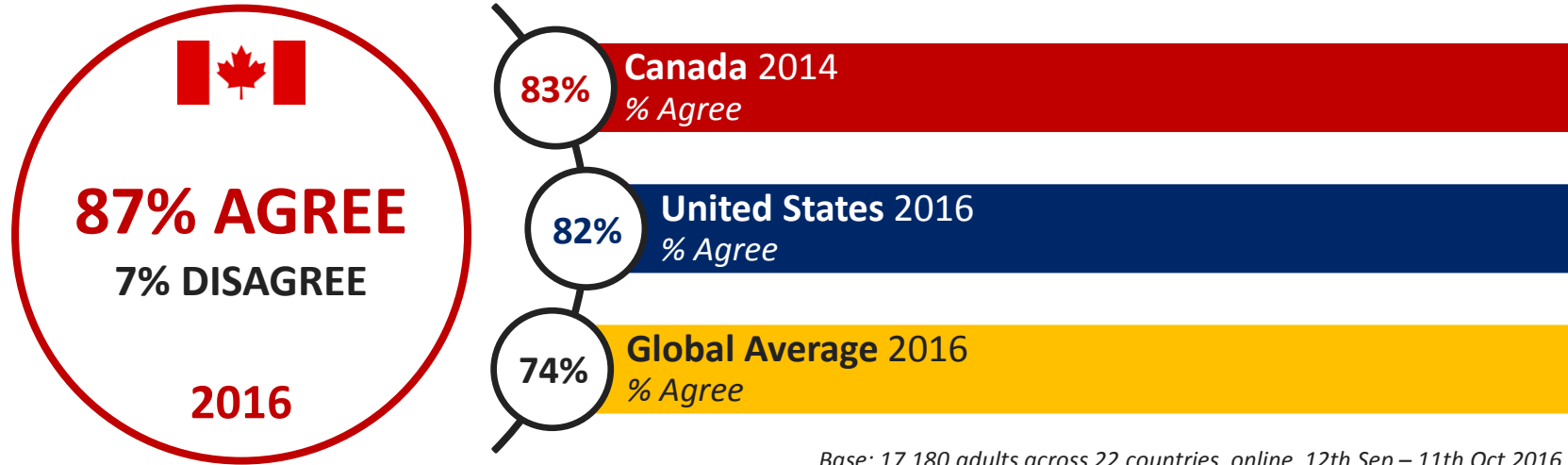
THE BIG TRENDS

It is all about Being Fair and Equal



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Vast majority of Canadians support LGBT rights



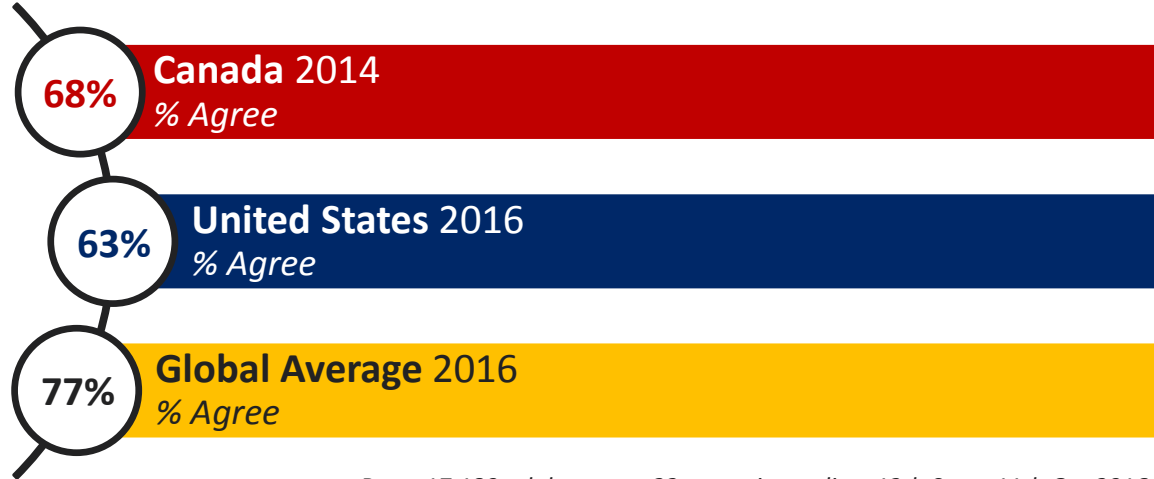
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

Gay men and lesbians should be free to live their own life as they wish



UNDERSTANDING CANADIANS

Income inequality seen as a negative thing for society



Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

Having large differences in income and wealth is bad for society overall



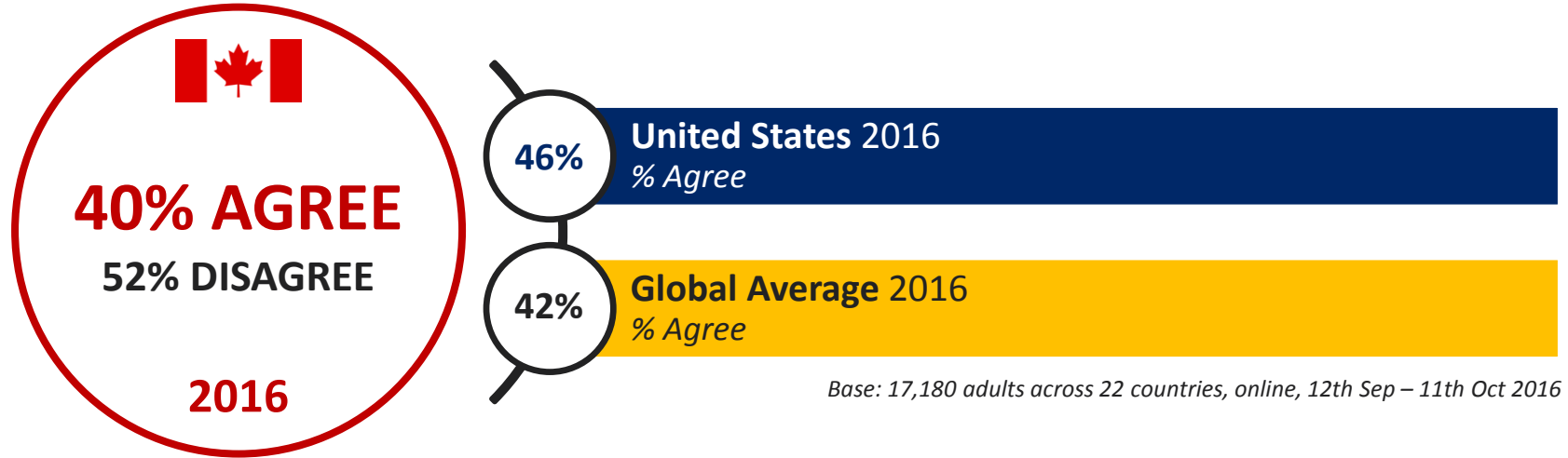
THE BIG TRENDS

The State of Businesses



UNDERSTANDING CANADIANS

Canadians question their trust in business overall



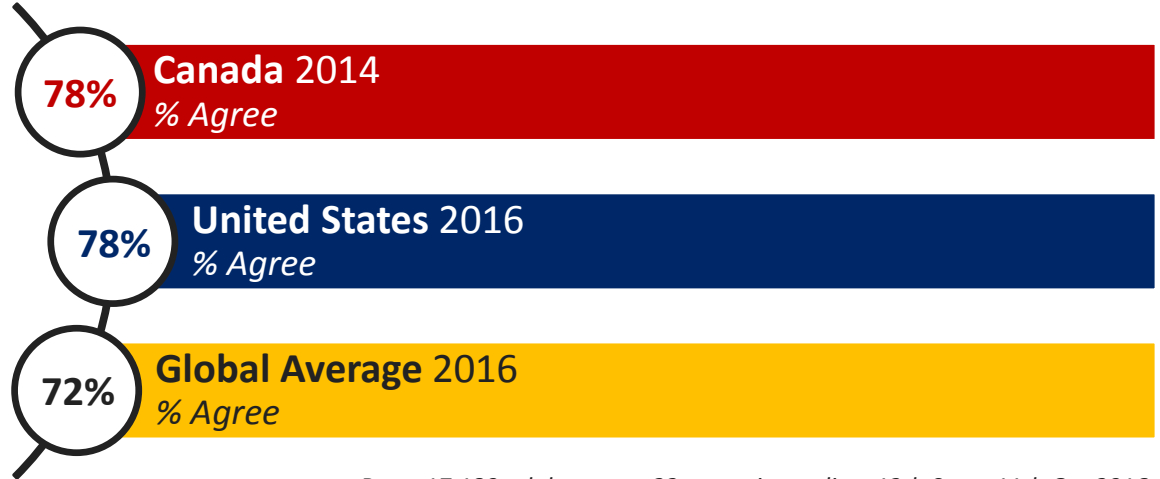
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

I have a high level of trust in businesses in general



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Canadians see customer service becoming too impersonal



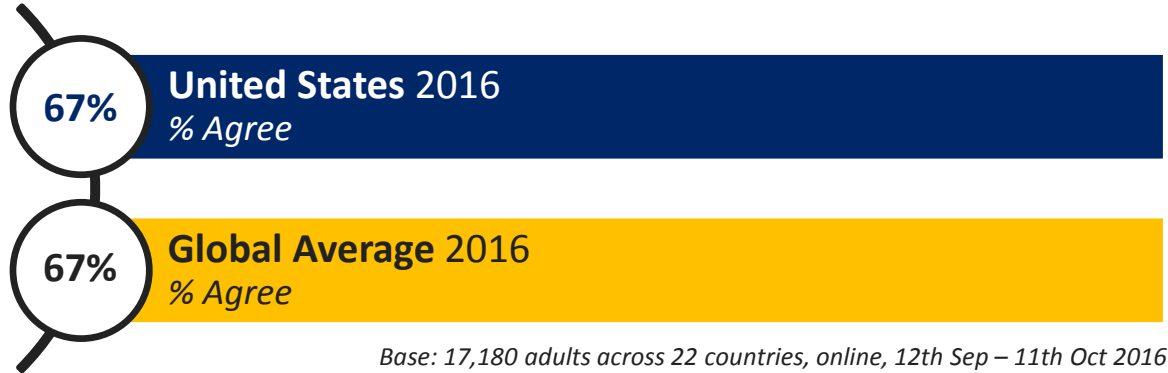
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

Customer service is getting too automated and impersonal



UNDERSTANDING CANADIANS

Business seen as an economic driver



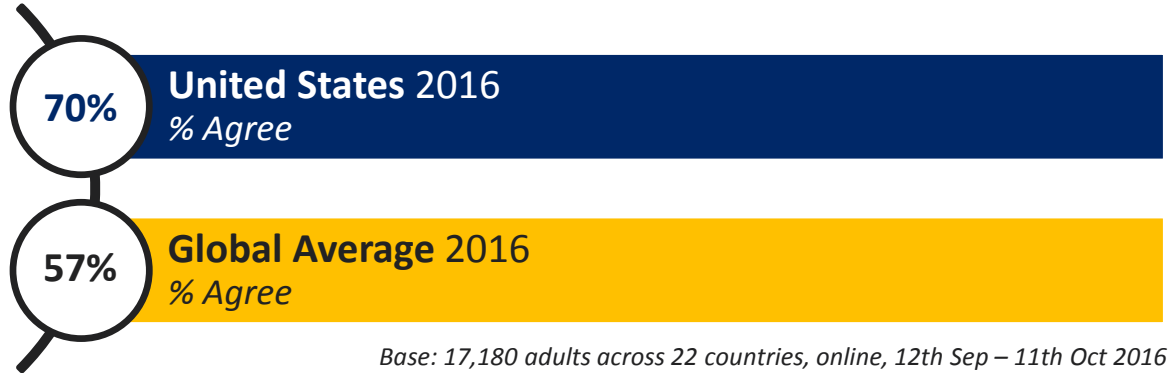
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

I trust businesses to produce economic growth in my country



UNDERSTANDING CANADIANS

Canadians trust business to deliver quality



Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

I trust businesses to deliver the standard of products and services they promise



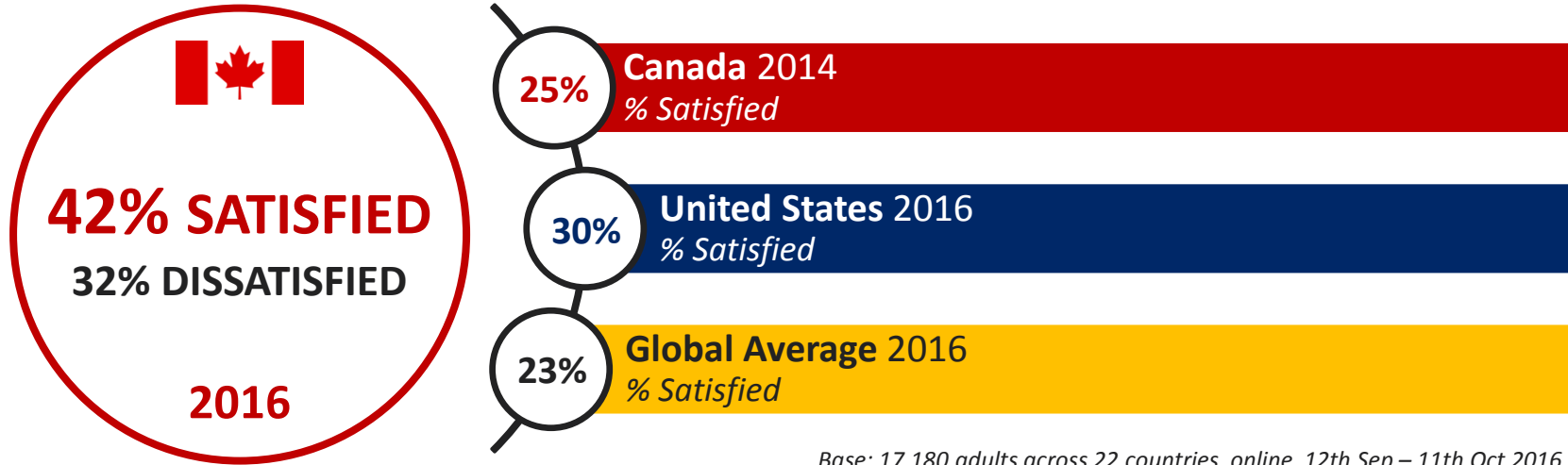
THE BIG TRENDS

The State of Government



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Satisfaction with how government is running the country has increased, much better than US and world



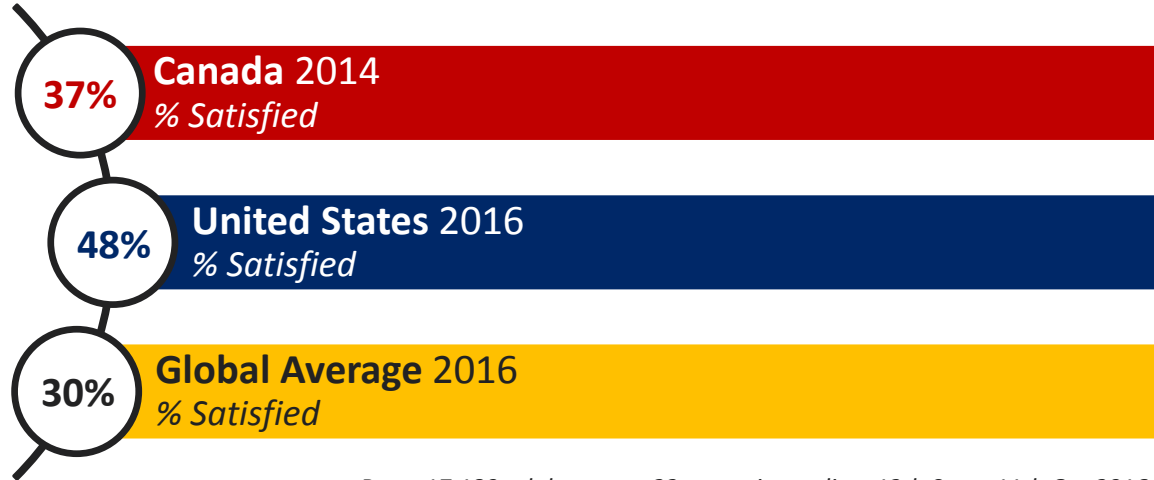
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

...the way the government is running the country?



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Canadians improving, but divided, on satisfaction with local public services



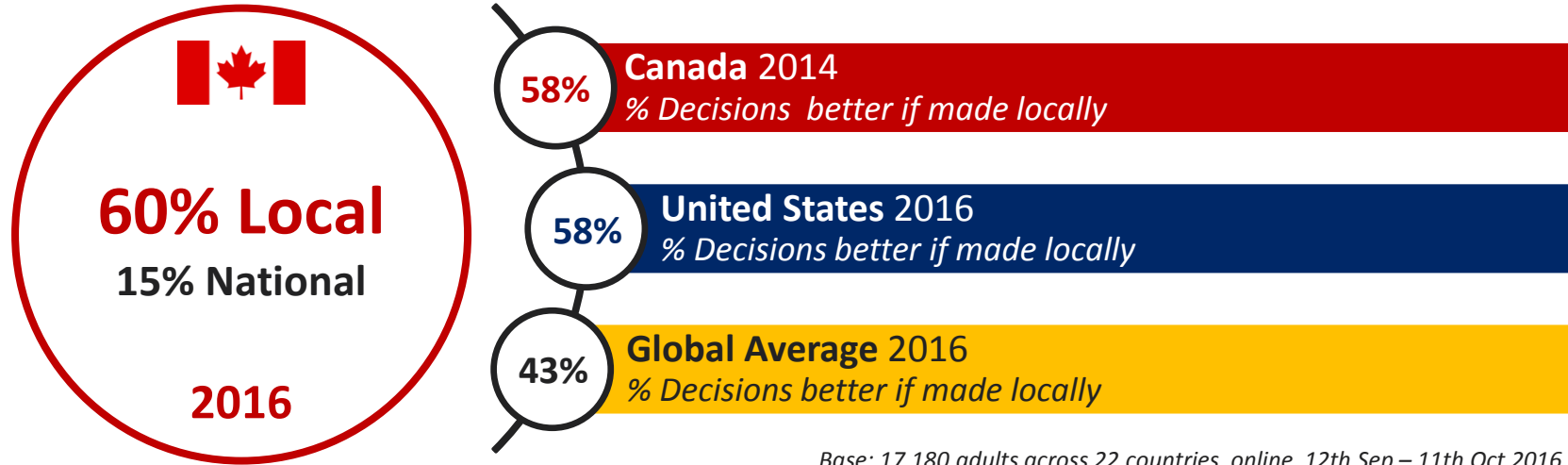
Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

...local public services (e.g. public transportation, public education, public safety and social services)?



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Canadians prefer local decision-making over national for core services: transportation, education, safety, social services, etc.



Base: 17,180 adults across 22 countries, online, 12th Sep – 11th Oct 2016

- A. **Decisions about public services** (e.g. public transportation, public education, public safety and social services), **are better if they are made locally**
- B. **Decisions about public services** (e.g. public transportation, public education, public safety and social services), **are better if they are made nationally**



UNDERSTANDING CANADIANS

Data For This Report Were Generated From Ipsos' Global @dvisor

SURVEY METHOD	COUNTRIES	SAMPLE	WEIGHTING
<p>Data in this presentation is from Ipsos' Global Trends survey, which was conducted using the Global @dvisor platform.</p> <p>This is the second wave of Global Trends – a previous version was run on the Global @dvisor platform in 2013.</p> <p>In 2016, the survey was conducted between September 12 - October 11, 2016 in 23 countries.</p> <p>In 2013, the survey was conducted between September 3-17, or to a sample of 16,167 between October 1 – 15, 2013 in 20 countries.</p>	<p>In 2016, 23 countries were surveyed: Argentina, Australia, Belgium, Brazil, Canada, China, France, Great Britain, Germany, India, Indonesia, Italy, Mexico, Japan, Peru, Poland, Russia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.</p> <p>The 2014 wave covered the same countries, except for Indonesia, Mexico and Peru.</p>	<p>Approximately 1000+ individuals were surveyed in Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Spain, Great Britain and the United States of America. Approximately 500+ individuals were surveyed in Argentina, Belgium, Poland, Mexico, Peru, Russia, Saudi Arabia, South Korea, Sweden and Turkey.</p> <p>Online surveys can be taken as representative of the general working age population in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Israel, Italy, Japan, Poland, South Korea, Spain, Sweden, and the United States.</p> <p>Online samples in Brazil, China, India, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey are more urban/educated/income than their fellow citizens and the results should be viewed as representative of a more affluent and “connected” population.</p>	<p>The results are weighted to ensure that the sample's composition reflects that of the adult population according to the most recent country Census data, and to provide results intended to approximate the sample universe. Further, results are weighted to give each country an equal weight in the “global” sample.</p> <p>Sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.</p>



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