

PUBLIC PERSPECTIVES



THE NUMBERS THAT MATTER 2017

December 2017



INTRODUCTION



From all the numbers we collected in 2017, these are 20 numbers we think matter.

What the numbers tell us is that the veneer of sunny ways is thin. The further we ask people to look into the future, the more storm clouds they see on the horizon.

Perhaps we shouldn't be too surprised given our collective angst about the overwhelming pace of change. Although change is a constant, and few people would swap today's world for the world of a century ago, this time the change feels different. It feels faster. It feels never-ending. And what might be most worrisome, we feel that we are increasingly facing change alone.

Our clients are tasked with leading change. Whether your business is the integration of new immigrants, improving health care, realizing the potential of machine learning, digitizing government services or protecting the data of Canadians, we believe there is insight in these 20 numbers that will help guide your decisions.

As 2017 draws to a close and we look toward 2018, we would like to wish our Public Perspectives' readers and our clients all the best. We hope you get to spend some time over the holidays with family and friends and take a break from the rapid pace of day-to-day life.

See you in 2018!

Mike Colledge
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81%

All the world is our stage
and we love it.

Canada has always aspired to punch above our international weight class. We take great pride in our international accomplishments from the theatre of war to the theatres of Broadway, and we are fond of recognizing “our” success with a “they are Canadian, eh.”

Our latest export is Prime Minister Trudeau, who has elevated Canada’s image. Canada was ranked as the top positive influencer on world affairs in a recent 25-country survey.



68%

The national economy is on a roll.

Positive sentiment toward the national economy has grown from 52% to 68% since the start of 2017, and while the national enthusiasm hasn't trickled down to all of Canada's regions, or to our personal prospects, it sure has kept the Federal Liberals on top of the public's "nice list".

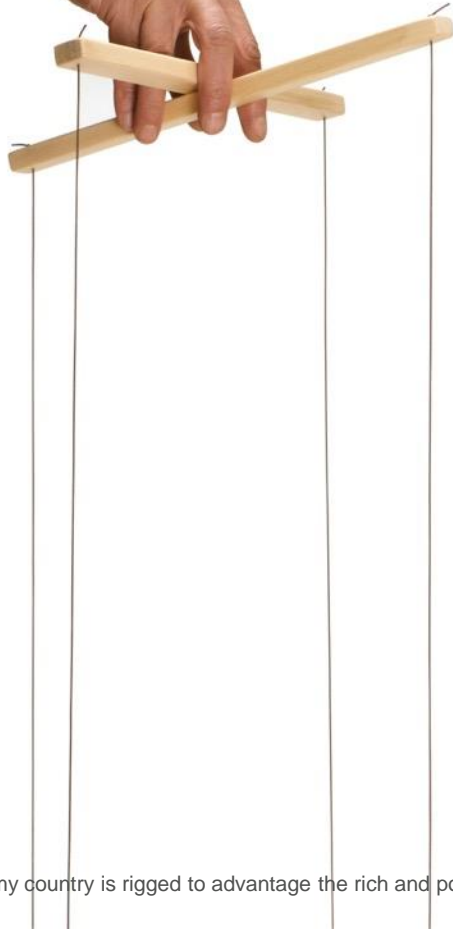
72%

Income inequality a decidedly bad idea.

With all the talk of the 1% of top earners it's a bit of a shocker that 99% of Canadians don't agree with this statement.

Federal and Provincial Governments have started to address the issue, but we see this as a growing concern as technology disrupts our economy and labour market and could result in an even greater polarization of wealth.





71%

The economy is rigged for the 1%.

Belief that the little guy can't catch a break is a well known theme, and politicians in Canada and elsewhere have made "helping the middle class" their siren call.

That said, six in ten also agree that government decisions do not reflect their priorities, so if the rich get richer, most Canadians won't be surprised.



26%

Is owning your own home too much to expect?

Canadians are less likely than Americans (38%) to say that it will be easier for them to own a home compared to their parents.

It used to be that the path to adulthood had four main bridges to cross. Get a job. Get married. Have kids. Buy a house. Today we see marriage and birth rates declining, the gig economy re-defining the term “job”, and houses becoming financially out of reach.



57%

Making money matters.

Canadians are more likely than Americans to feel this way, and the sentiment has grown from 49% in 2014.

Maybe it's because half of us do not think our quality of life or our financial situation will improve in the next 10 years. Maybe it's because many of us do not have pensions and are unsure of the future of healthcare. Whatever the reason, making money increasingly matters.



40%

Yes to immigration but at what cost?

At a time when Canada arguably needs more immigration than ever to offset our declining birth rate and fund expanding social programs, the mantra that Canada is a cultural mosaic rather than a melting pot may be wearing thin.

While this number has trended down from 44% in 2016 there is still a substantial undercurrent of negative views toward immigration that will need to be addressed as immigration increases, and remains a key driver of economic growth.



35%

Health care is the top public issue.

With governments focused on immigration, climate change, and how AI will reshape our economy and international trade, health care is still seen as the most pressing issue for Canadians.

With an ageing population, and increasingly expensive healthcare technology coming online, we don't expect to see it drop off the radar any time soon. Nor do we expect to see a decline in the pressure on Governments to fund these health care advances.



78%

World War Three?

Canadians are more likely than citizens in other countries in expecting to see another world conflict.

While economic power has replaced military power in some aspects of world affairs, a large number of Canadians see the potential for conflict that goes beyond economic sanctions.

What role Canada might play in the future will be determined by the decisions and investments we make today.

76%

The risk and reward of big data.

The debate over who owns, and who governs data is only beginning.

Canadians see immense value and great opportunity in data. They also see a potential loss of privacy and personal identity.

If we want to realize the value of data to improve services, and spur economic growth, Job One is addressing the concerns of Canadians.





73%

Heading toward environmental disaster.

Whether it be climate change, or plastics in the ocean, a majority of Canadians feel we are headed for an environmental disaster. This has increased from 67% in 2014.

Viable solutions that change our behavior such that our long term fears take priority over our short term desires are necessary.



53%

The robots are coming.

Robots and AI are going to fundamentally re-shape our economy and our country.

While robots are a concern for many blue collar Canadians, AI may have an even bigger impact on professionals such as lawyers, accountants and doctors. Professions that rely heavily on data and precedent will be impacted by computers that can make faster, cheaper and more accurate analyses.



81%

Fake news and information overload.

It may be the rise of fake news. It may be that everyone now has a voice in social media. What is clear is that the volume of information is making it harder for people to understand the world, and to know who or what to trust.

The implication for everyone trying to raise awareness or shift behaviours is that you aren't working in silence. To get through requires more than the facts. Your message needs to be targeted, concise, relevant and repeated.



70%

The world is changing too fast.

Rapidly changing technology is a factor in our perception of the pace of change. Social media and breaking news on a 24/7 basis is also contributing to a feeling of acceleration, and challenging our capacity to process change. While 70% seems high, it has held steady since 2014.

We need to ensure that we consider these concerns and ensure citizens and consumers are willing and capable, otherwise we will not realize the advantages of wide-scale tech adoption.



41%

A worrisome trend in mental health.

In Ipsos' 2017 Mental Health Index the percentage of Canadians considered high risk increased from 35% in 2016.

On the positive side, more and more people are talking about mental health openly, and the stigma seems to be waning.

On the downside, the pace of change and an ever challenging world may increase the number of Canadians who face mental health challenges.

We will continue to track this in 2018 and hope to see some improvement.

31%

Is it time for the Bank of Amazon?

Amazon is selling food. Our municipalities may soon run on a Google platform. IBM Watson may be the first health professional we reach out to when feeling ill. All of them may offer us new banking options.

How we classify these companies is now irrelevant. Industries will increasingly be organized around data driven eco-systems, rather than product-based industrial sectors.





76%

Say goodbye to Main Street.

The same number of Canadians agree that half of all bank branches won't exist in ten years.

With online shopping availability now, and autonomous package delivery in the near future, these numbers aren't shocking. The main streets of big urban centres will be able to reinvent what it means to shop, but small towns may struggle to keep boarded up storefronts to a minimum.



IMAGE SOURCE: <https://www.ea.com/games/the-sims>

83%

Remember when “The Sims” was just a game?

It’s great that we can stay connected around the globe and have an online community within reach at all hours of the day, but it has big implications for our geographic communities.

As more and more people work, shop and live on-line, municipalities and communities will need to create more spaces and more reasons for human contact.



62%

It's not my problem.

The number who feel this way has increased from 57% in 2014.

Canadians say it is mostly the role of government to help those in need. At the same time, we increasingly see much of government as out of touch, and ineffective.

Canadians used to take great pride in our social safety net, but lately we seem to be distancing ourselves from it.

45%

Can communities survive without a common sense of purpose?

Can a country or community survive, let alone thrive, if we don't feel we share a common purpose with our neighbours?

Governments looking to implement programs aimed at helping a minority of the population will be increasingly challenged to demonstrate a benefit for all – or at least a plurality – of the population.



CONTACTS



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