

DARRELL BRICKER & JOHN WRIGHT of Ipsos Reid

# CANUCKOLOGY



**FROM DOLLARS TO DONUTS,**  
CANADA'S PREMIERE POLLSTERS REVEAL  
WHAT CANADIANS THINK AND WHY

**Warning:**

**We Need to Clarify Something  
Very, Very Serious Before We Begin  
This Morning...**

We are NOT these Guys:



We are nothing like them:  
They are *Illusionists*. We are *Pollsters*.

# **Our Presentation...**

**Does Polling Still Work?????**

**You Don't know Canada...**

**The Old and New Canada: the New Framing of the  
Canadian Citizen Consumer...**

**Global Polling...**

**Canada in a World of Innovation...**

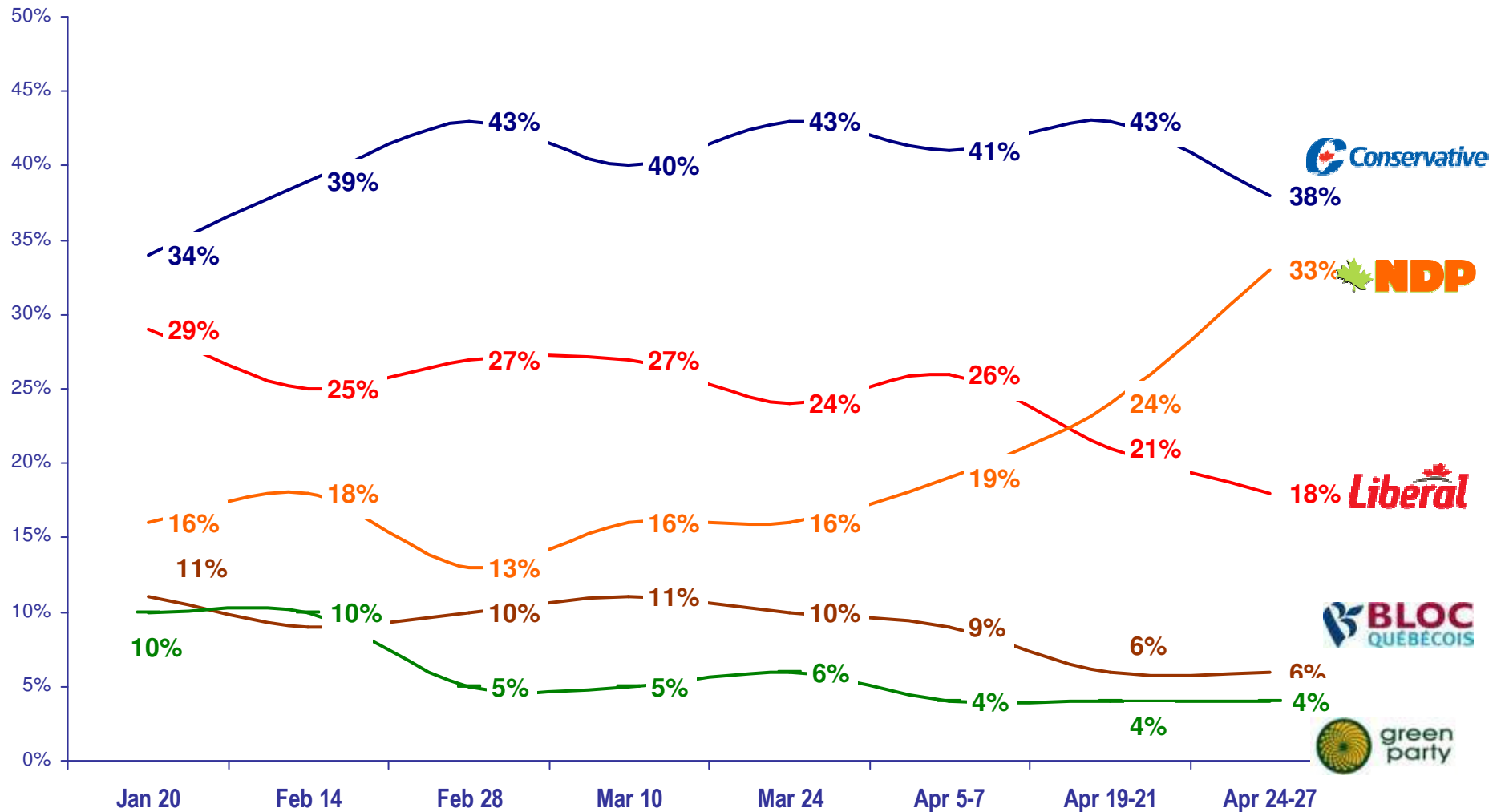
**Innovation in the Workplace as a Culture, not a  
Thing...**

**Some Final Thoughts...**



**So, Does Polling Still Work ?**

# 2011 Federal Vote Support: Our Last Poll 5 Days Before *E* Day...



Postmedia News / Global TV Ipsos Reid Survey Decided voters including leaners (n=894).

8% of all Canadian Adults (n=1,000) are Undecided



Ipsos Reid\*

Actual Vote %\*\*

Ipsos Reid Variance

## National

Conservatives	38%	Conservatives	39.6%	- 1.6 %
NDP	33%	NDP	30.6%	+ 2.4 %
Liberal	18%	Liberal	18.9%	- 0.9 %
Green	4%	Green	3.9%	+ 0.1 %

## Quebec

NDP	42%	NDP	42.9%	- 0.9 %
Bloc Quebecois	26%	Bloc Quebecois	23.4%	+ 2.6 %
Conservatives	15%	Conservatives	16.5%	- 1.5 %
Liberal	13%	Liberal	14.2%	- 1.2 %
Green	3%	Green	2.1%	+ 0.9 %

\*Ipsos Reid Final Poll Thursday April 28, 2011

\*\*Election Canada May 3, 2011

DARRELL BRICKER & JOHN WRIGHT

# CANUCKOLOGY



**So, How Well  
Do You Think  
You Know  
Your Country  
and Fellow  
Canadians?**

**FROM DOLLARS TO DONUTS**  
CANADA'S PREMIERE POLLSTERS REVEAL  
WHAT CANADIANS THINK AND WHY

Let's find  
out...

68% of  
Canadians  
enjoy  
quizzes...

# **Oh Canada, eh?**

**What province or region is most likely to support the decriminalization of marijuana?**

**Quebec**

**What province or region hates taxes the most?**

**Quebec**

**What province or region is the most religious, most believes the devil is active and most believes we will all perish in the battle of Armageddon?**

**Atlantic Canada**

# Oh Canada, eh?

What province or region has the most fire detectors, fire escapes and fire extinguishers?

**Atlantic Canada**

What province or region is least likely to believe Canada would be better off if immigrants went back where they came from?

**Alberta**

What province or region is most likely to have used a mobile device in the bathroom – and most likely to scoop it out if it falls in?

**Prairies**

# **Oh Canada, eh?**

**What province or region is the most environmentally conscious?**

**Atlantic Canada**

**What province or region complains the most about the condition of their roads?**

**Prairies**

**What province or region believes they belong first and foremost to the country, not their province?**

**Ontario**

# Oh Canada, eh?

What province or region is most likely to answer a cell phone if it rings while making love?

**British Columbia**

City where parents are least likely to leave their children unsupervised in the playground or activity area?

**Vancouver**

City most likely to believe that judges are too lenient on handing out criminal sentences?

**Halifax**

DARRELL BRICKER & JOHN WRIGHT

# CANUCKOLOGY

Canada's  
favorite  
doughnut?

**Boston Cream**  
(18%)



Making  
Assumptions  
Leads to  
Stereotyping  
which Can Lead To  
Bad Business  
Decisions,  
Relationships...

## FROM DOLLARS TO DONUTS

CANADA'S PREMIERE POLLSTERS REVEAL  
WHAT CANADIANS THINK AND WHY



# Demography Isn't Destiny... **But...**



## Population

In 1960  
Canada was  
18 million  
souls, now  
almost 34  
Million



## Fertility Rate

Fertility Rate  
Now Below  
Replacement  
Levels



## Life Expectancy

Life  
Expectancy  
Has  
Increased –  
Especially  
For Women



## Seniors

By 2015  
Seniors Will  
Outnumber  
Children



## Urban Nation

We've  
Become An  
Urban  
Nation



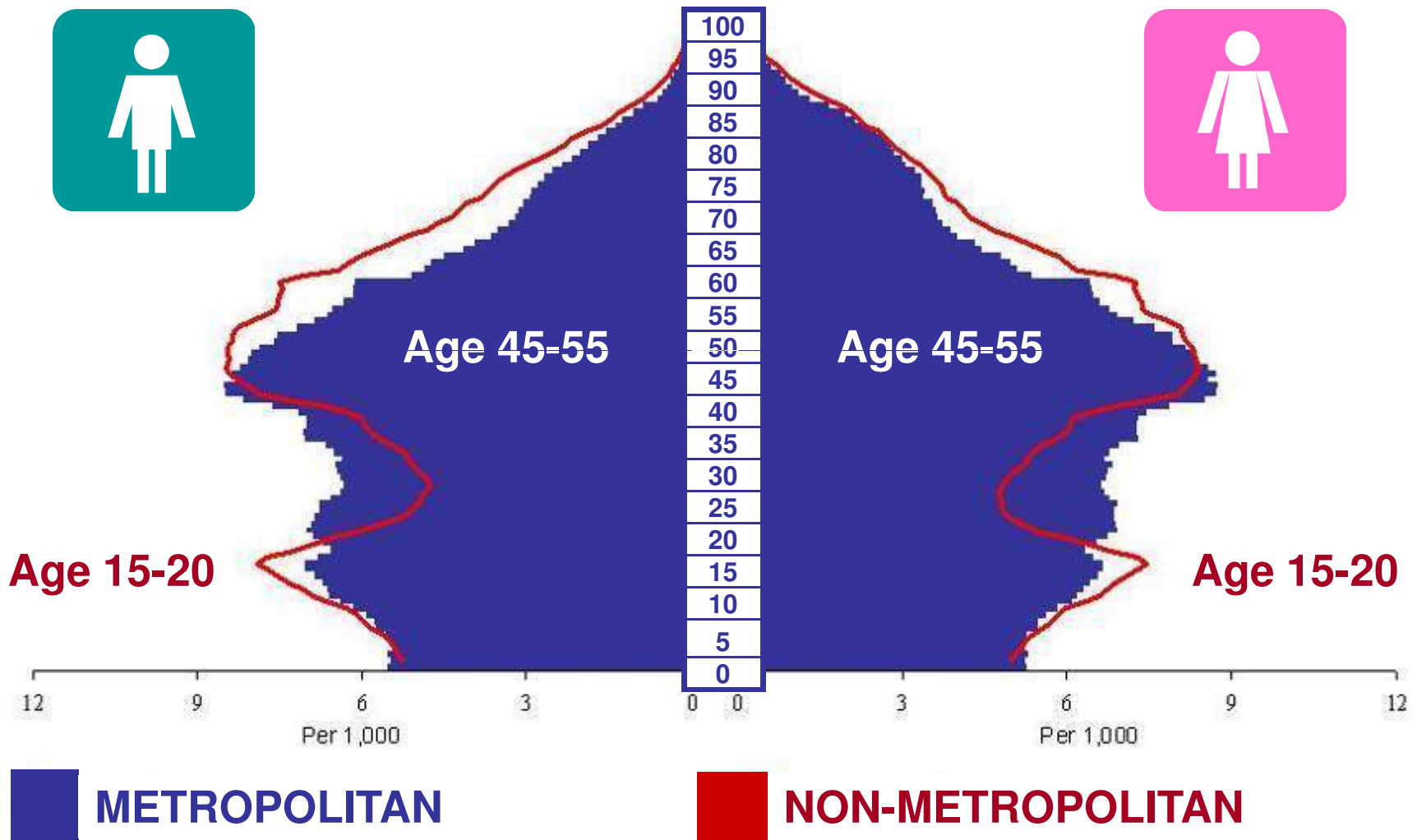
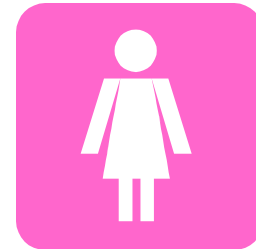
# Canada's Population Pyramid

**Males**



**AGE**

**Females**



# Demography Isn't Destiny... But...



## Technology

Computerization of work and home – 80% of Canadians used Internet last month for personal reasons



## Cultural Diversity

Immigration has increased – and the places immigrants come from have changed



## Immigrants and Urban Areas

Immigrants represent 6% of rural populations, 25% of urban areas



# The Top Ten Countries of Birth of Recent Immigrants

**1981**

UK

Vietnam

**USA**

India

**Philippines**

Jamaica

Hong Kong

Portugal

Taiwan

**2006**

China

India

**Philippines**

Pakistan

**USA**

South Korea

Romania

Iran

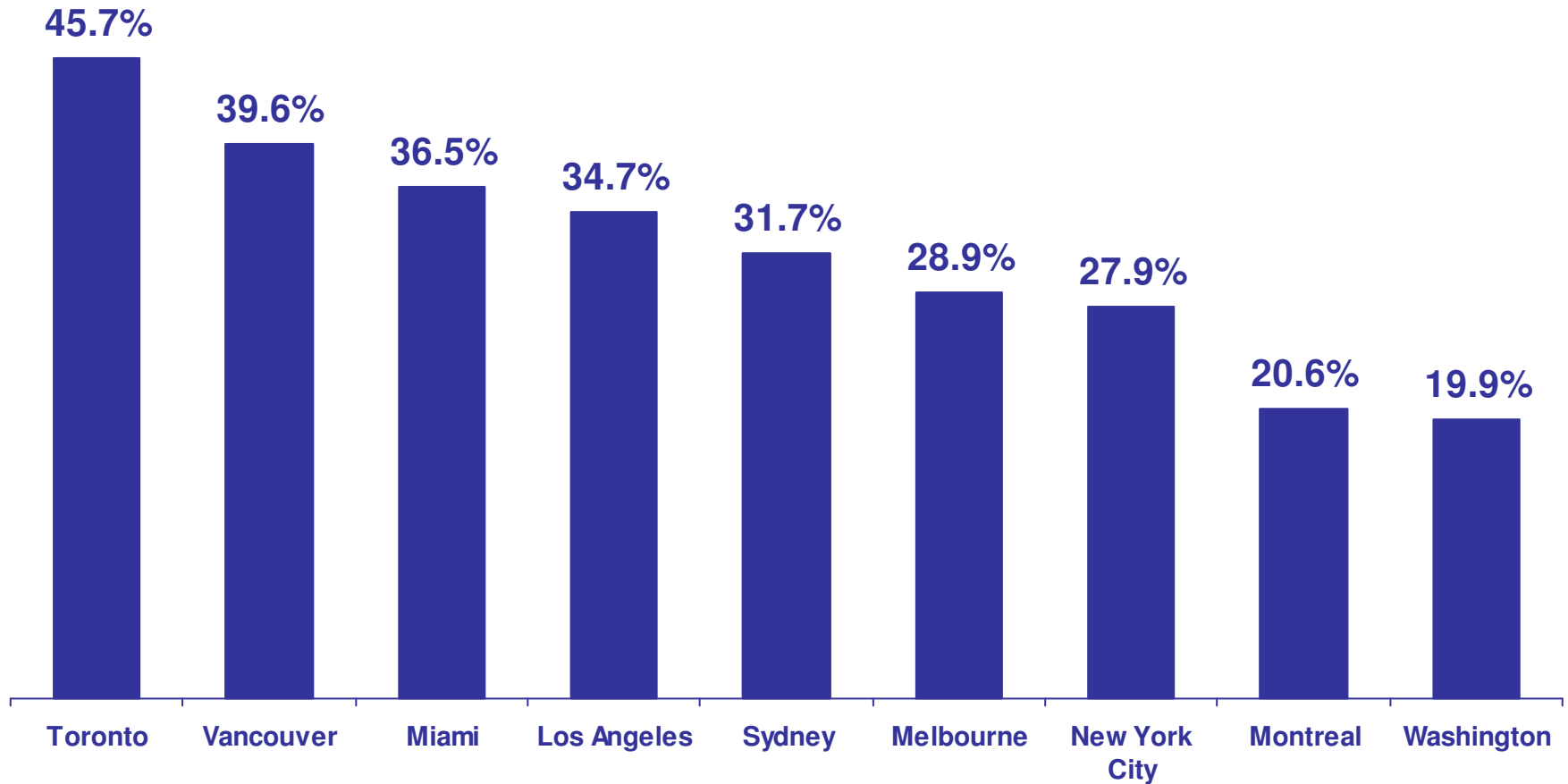
UK

Colombia



# Foreign Born

As a Percentage of **City Population**



# Demography Isn't Destiny... But...



## Employment

Female employment rate has nearly doubled



## Education

Educational attainment has increased



## Trade

The importance of trade in our economy has quadrupled



## Government

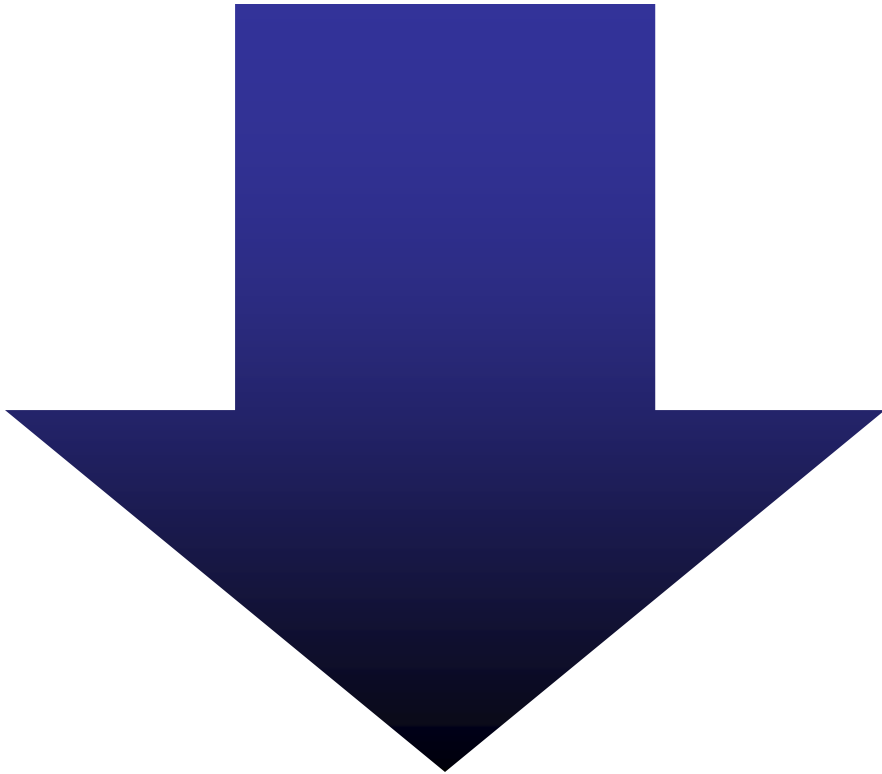
Government a bigger share of our economy - taking 25% more of our money, but redistributing more too



# The New Canadian Mindset



# The Decline In Public Trust



# The Canadian Wall and **Fall** of Trust: 2003 versus 2011...

<b>Pharmacists</b>	<b>79%</b>	<b>- 12%</b>
<b>Doctors</b>	<b>75%</b>	<b>- 10%</b>
<b>Airline Pilots</b>	<b>75%</b>	<b>- 6%</b>
<b>Canadian Soldiers</b>	<b>72%</b>	<b>+ 15%</b>
<b>Teachers</b>	<b>65%</b>	<b>- 14%</b>
<b>Day Care Workers</b>	<b>59%</b>	<b>+ 1%</b>
<b>Police Officers</b>	<b>57%</b>	<b>- 16%</b>
<b>Judges</b>	<b>51%</b>	<b>N\A</b>
<b>Accountants</b>	<b>49%</b>	<b>- 3%</b>

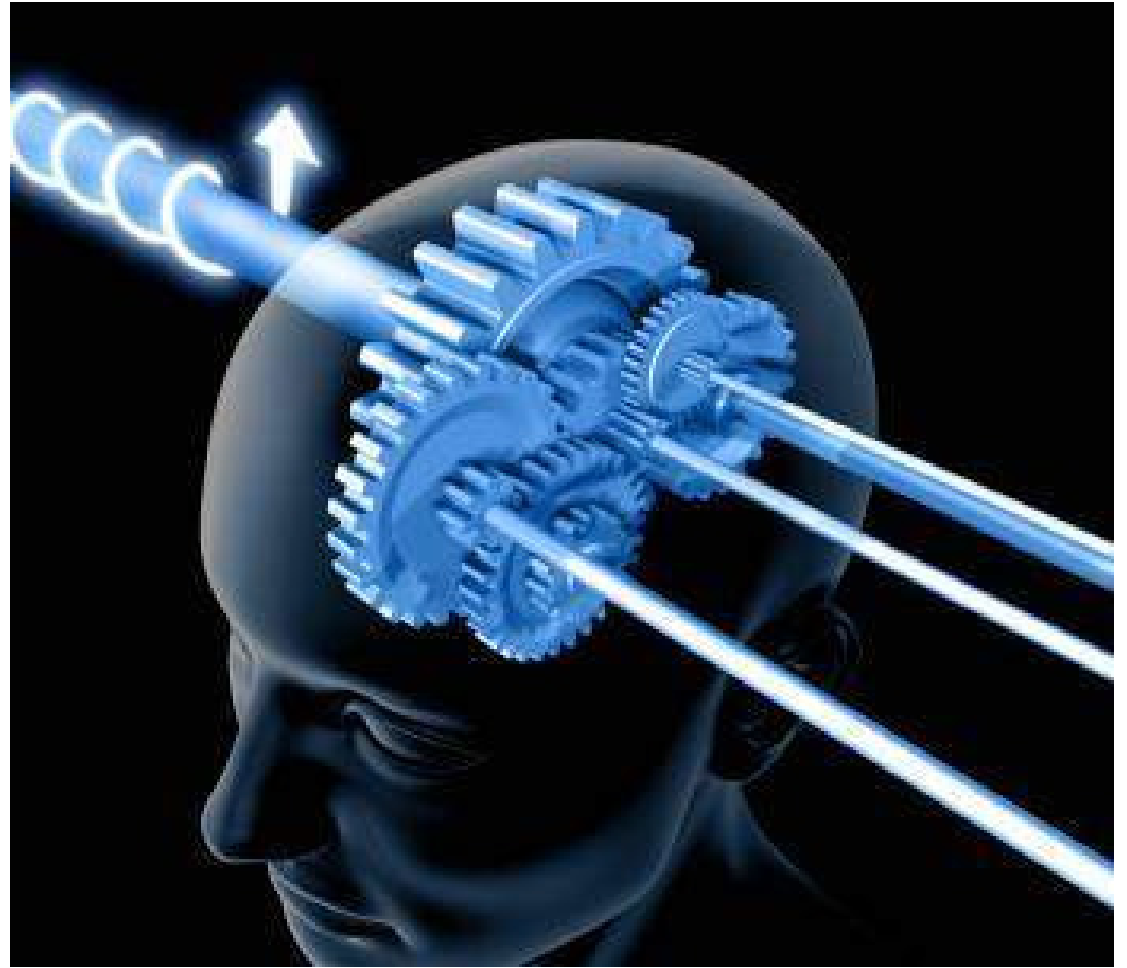
# The Canadian Wall and **Fall** of Trust: 2003 versus 2011...

<b>Chiropractors</b>	<b>44%</b>	<b>+ 4%</b>
<b>Plumbers</b>	<b>39%</b>	<b>- 3%</b>
<b>Church Leaders</b>	<b>38%</b>	<b>N\A</b>
<b>Financial Advisors</b>	<b>37%</b>	<b>- 3%</b>
<b>Charity Leaders</b>	<b>35%</b>	<b>N\A</b>
<b>Engineers</b>	<b>34%</b>	<b>N\A</b>
<b>TV/Radio Personalities</b>	<b>30%</b>	<b>- 6%</b>
<b>Journalists</b>	<b>29%</b>	<b>- 2%</b>
<b>Environmental Activists</b>	<b>28%</b>	<b>N\A</b>

# The Canadian Wall and **Fall** of Trust: 2003 versus 2011...

<b>Auto Mechanics</b>	<b>25%</b>	<b>- 8%</b>
<b>Lawyers</b>	<b>22%</b>	<b>- 7%</b>
<b>New Home Builders</b>	<b>19%</b>	<b>- 8%</b>
<b>Chief Executive Officers</b>	<b>19%</b>	<b>- 2%</b>
<b>Local Municipal Politicians</b>	<b>17%</b>	<b>+ 3%</b>
<b>Union Leaders</b>	<b>17%</b>	<b>N/A</b>
<b>National Politicians</b>	<b>9%</b>	<b>N/C</b>
<b>Car Salespeople</b>	<b>8%</b>	<b>- 2%</b>

# The Rise Of The Knowledge Citizen / Consumer



# Old Canada



**English and French – very white**



**More rural – focus on natural resources**



**The National Policy**



**Politics of elite accommodation driven by white men in Toronto, Montreal and Ottawa**



**Trusting of public authorities and institutions (Peace, Order and Good Government)**



**Fearful, paternalistic, conservative, judgmental, reflexively anti-American**

# New Canada



**More Urban, Multi-Cultural**



**World Traders With A Growing Focus On Services**



**Older, More Female**



**Tolerant, Opinionated, Demanding, And Difficult**



**Post-Ideological Libertarian  
(neither left nor right)**



**Less Engaged With Traditional Institutions**



**Aggressively Canadian**

**Polling the World...Every Month...**

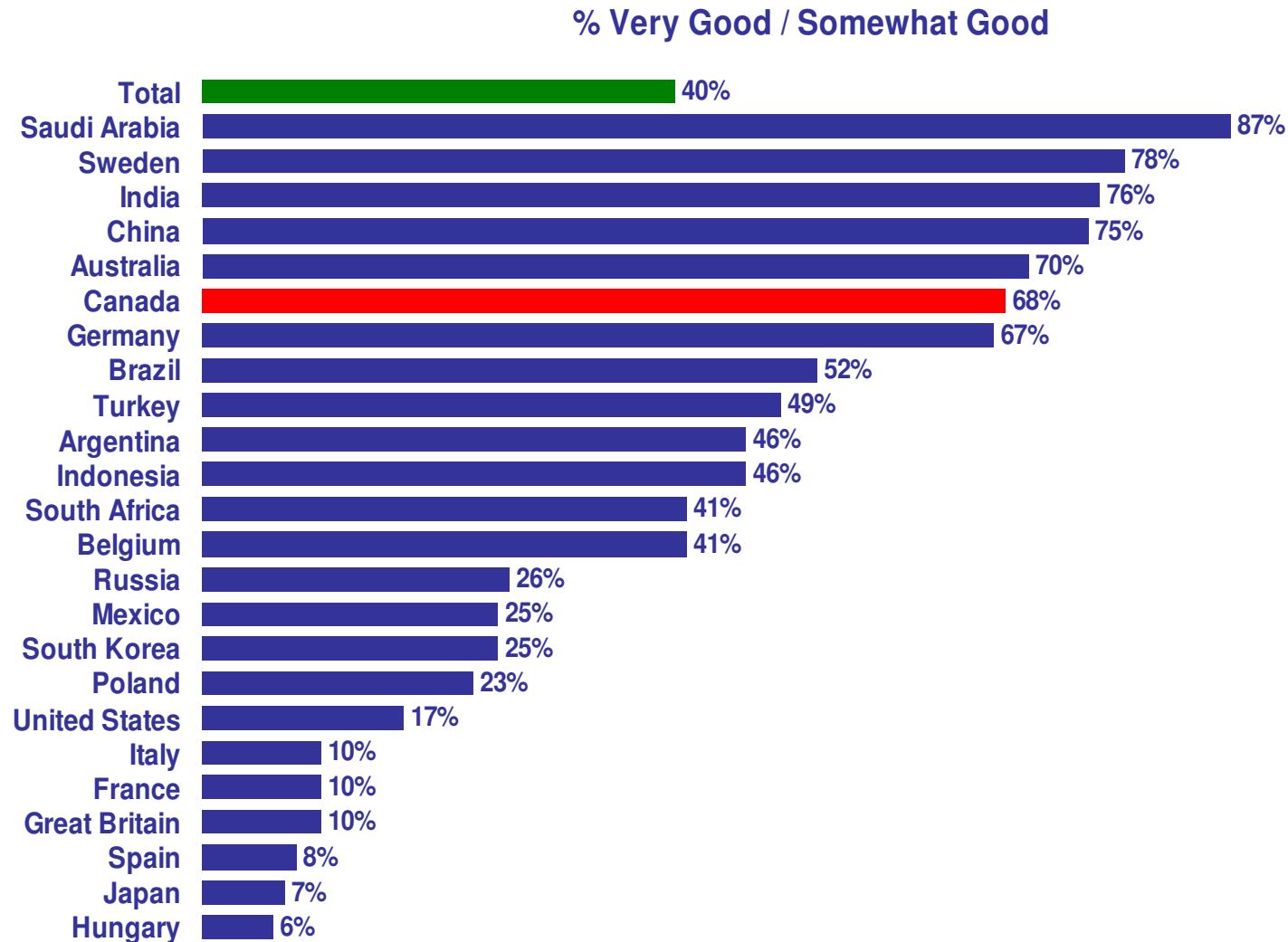
**Welcome to *the* World of the *Ipsos*  
*Global @dvisor...***



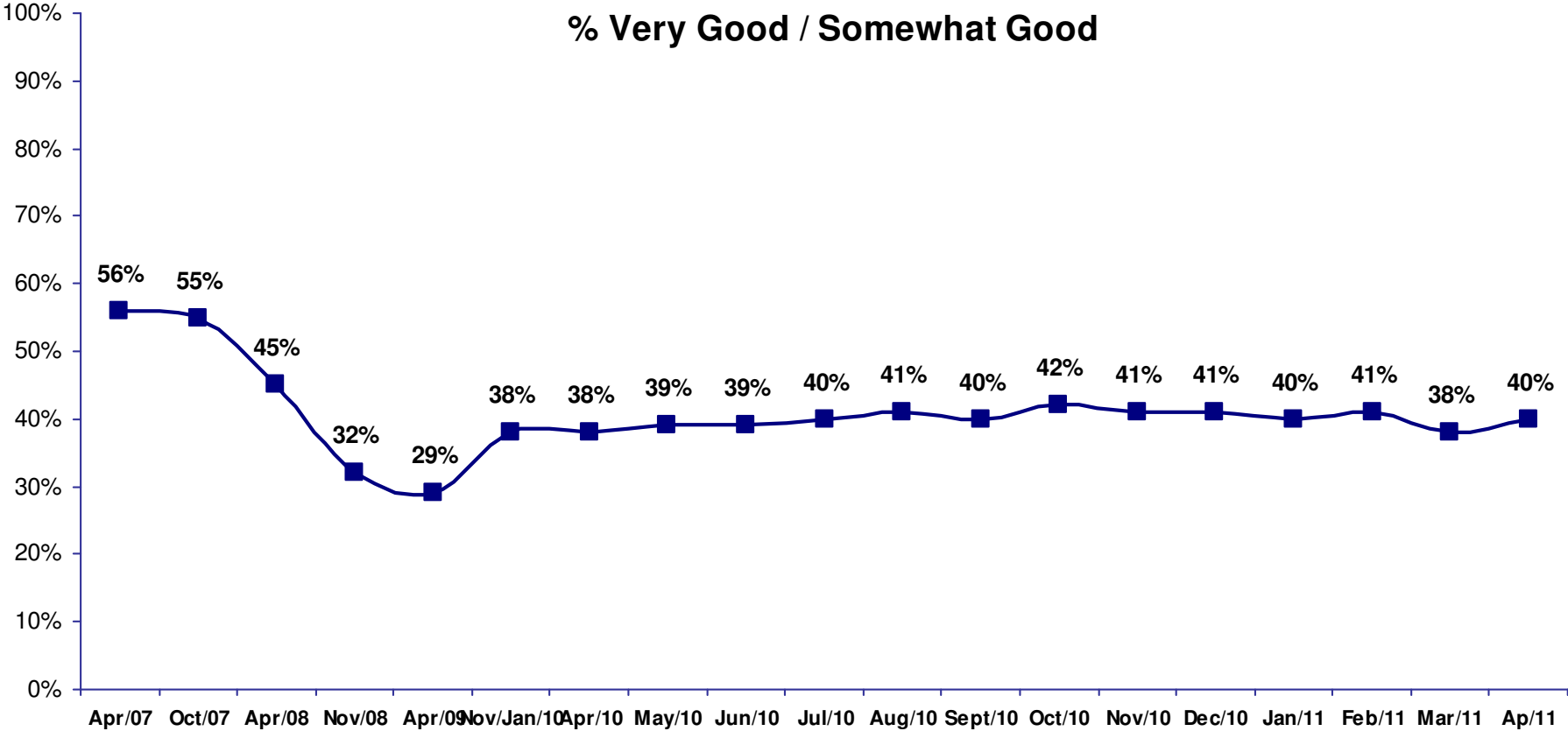
**It Lets Us Gather Information on the  
World's Most Vital Topics...**



# Like, Where Canada is in its Citizen Consumers Rating their National Current Economic Situation as “Good”: 6<sup>th</sup> of 24...



# And How the Global Economic “Recovery” Appears Across the World...



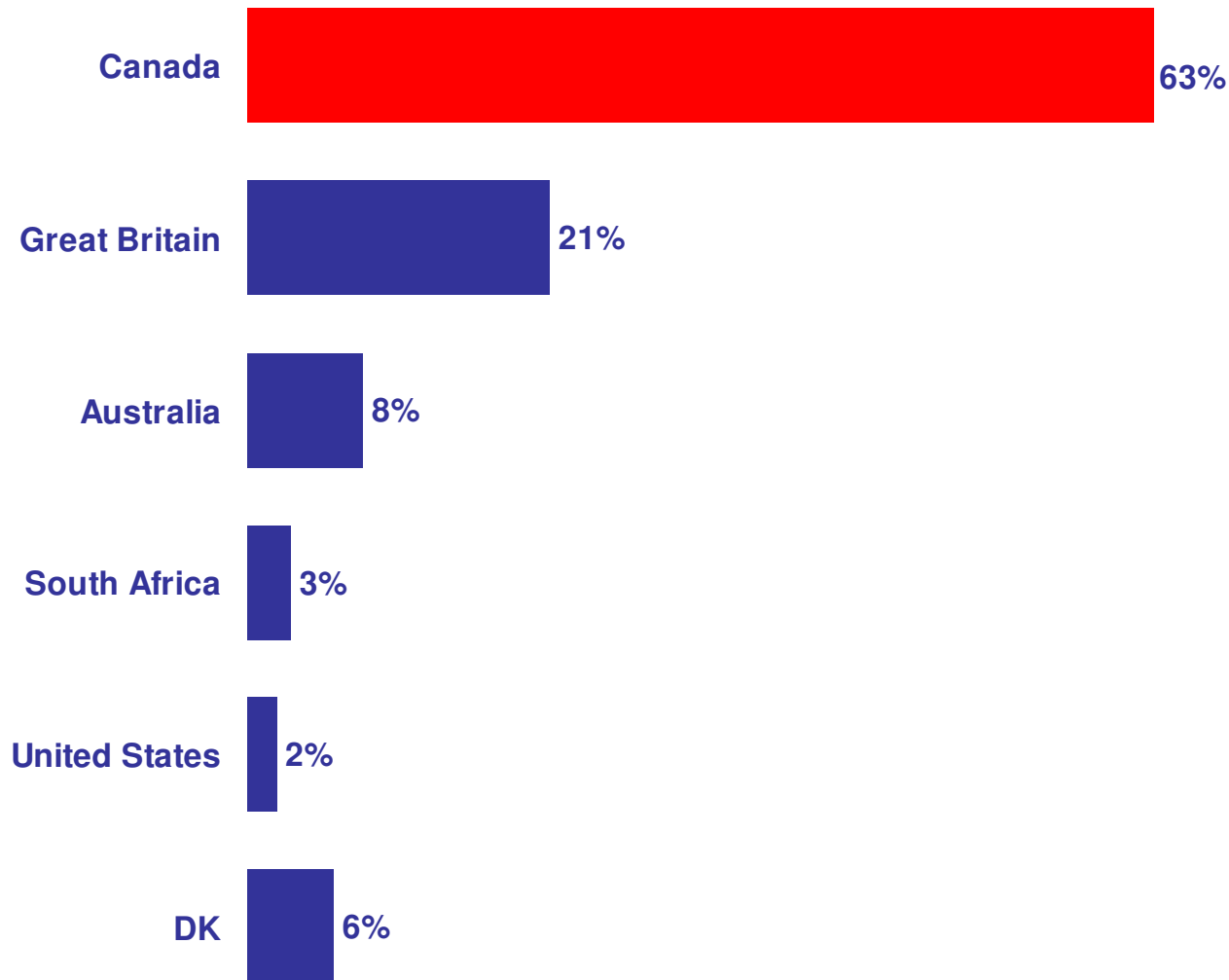
Now thinking about our economic situation, how would you describe the current economic situation in [insert country]?  
Is it very good, somewhat good, somewhat bad or very bad?

# Or, if these Unidentified, Uniformed People Come From Either:

- [RANDOMIZE]
- Canada
- United States
- Australia
- Great Britain
- South Africa
- Don't know

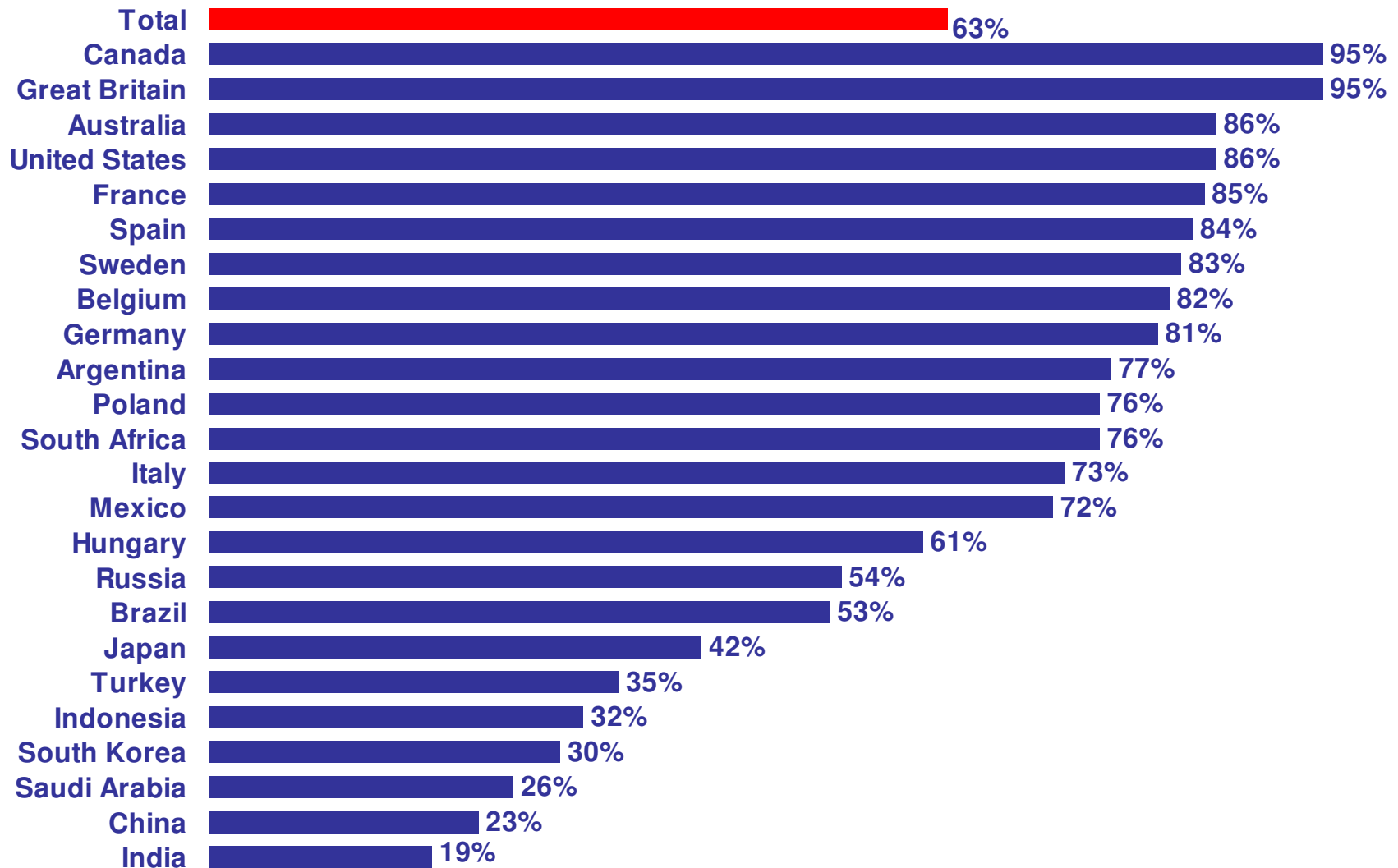


# Where People Think Uniformed RCMP Officers Come From:



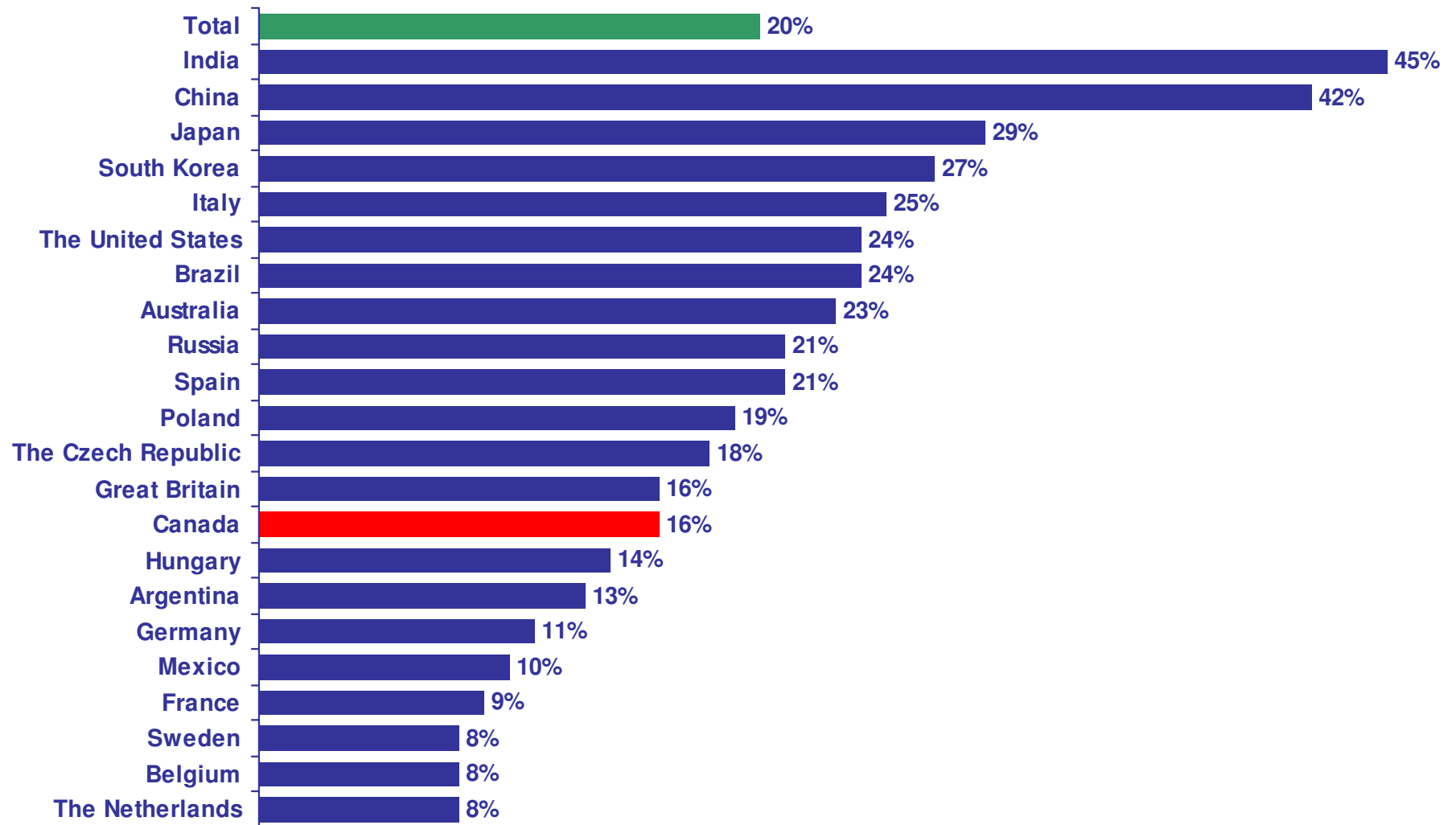
*Please look at this image: Which country do you think these people are from?*

# Two Thirds (63%) Were Able To Correctly Identify The Two Officers In The Picture As Being From... Canada



Please look at this image: Which country do you think these people are from?

# Or, How Many People in the World Think Aliens From Other Planets Walk Amongst Us? 1 in 5 (20%)...**16% in Canada...**

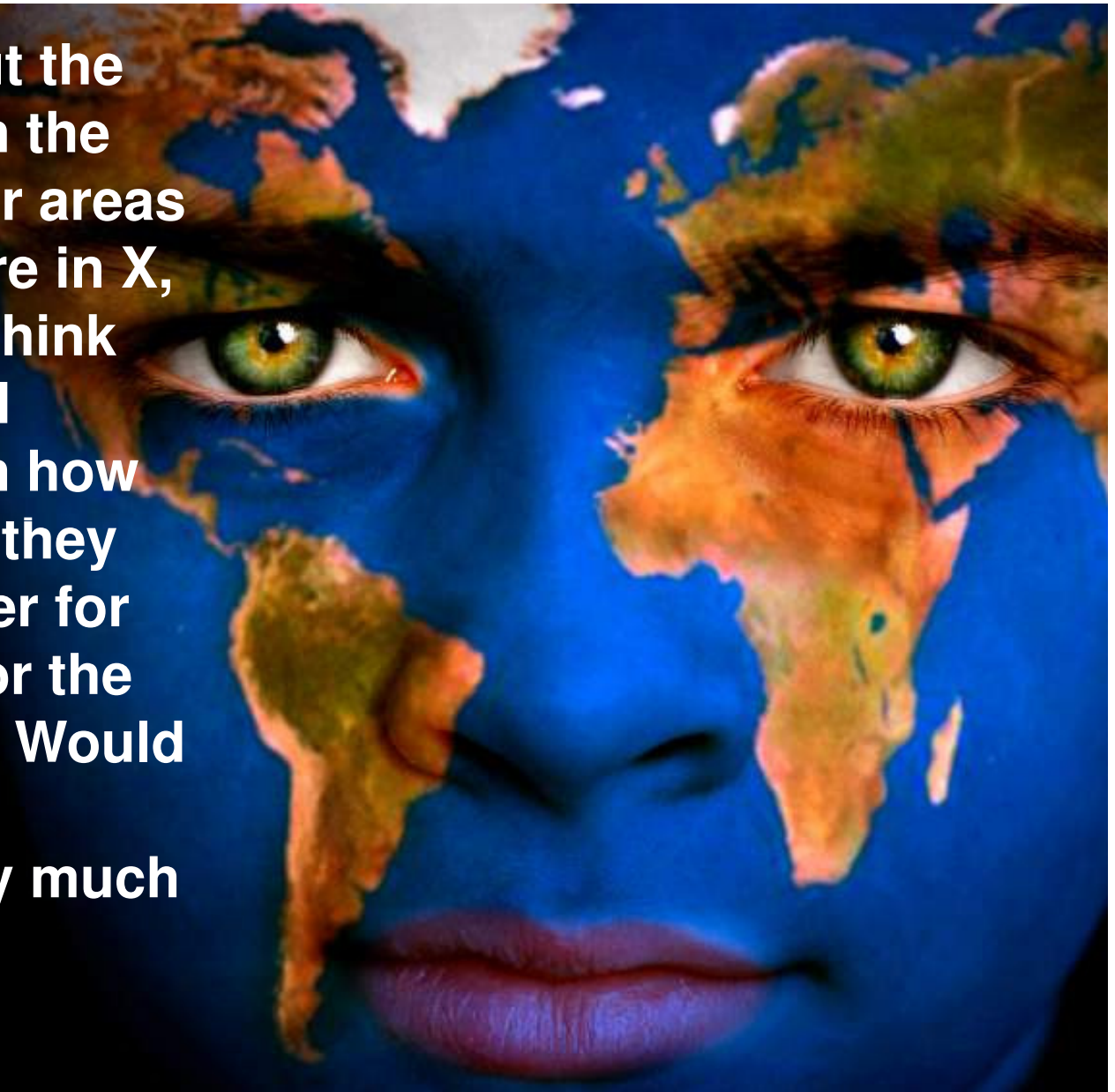


Alien beings have come to earth and walk amongst us in our communities disguised as us. Please indicate if you agree strongly, agree somewhat, disagree somewhat or disagree strongly with the following.

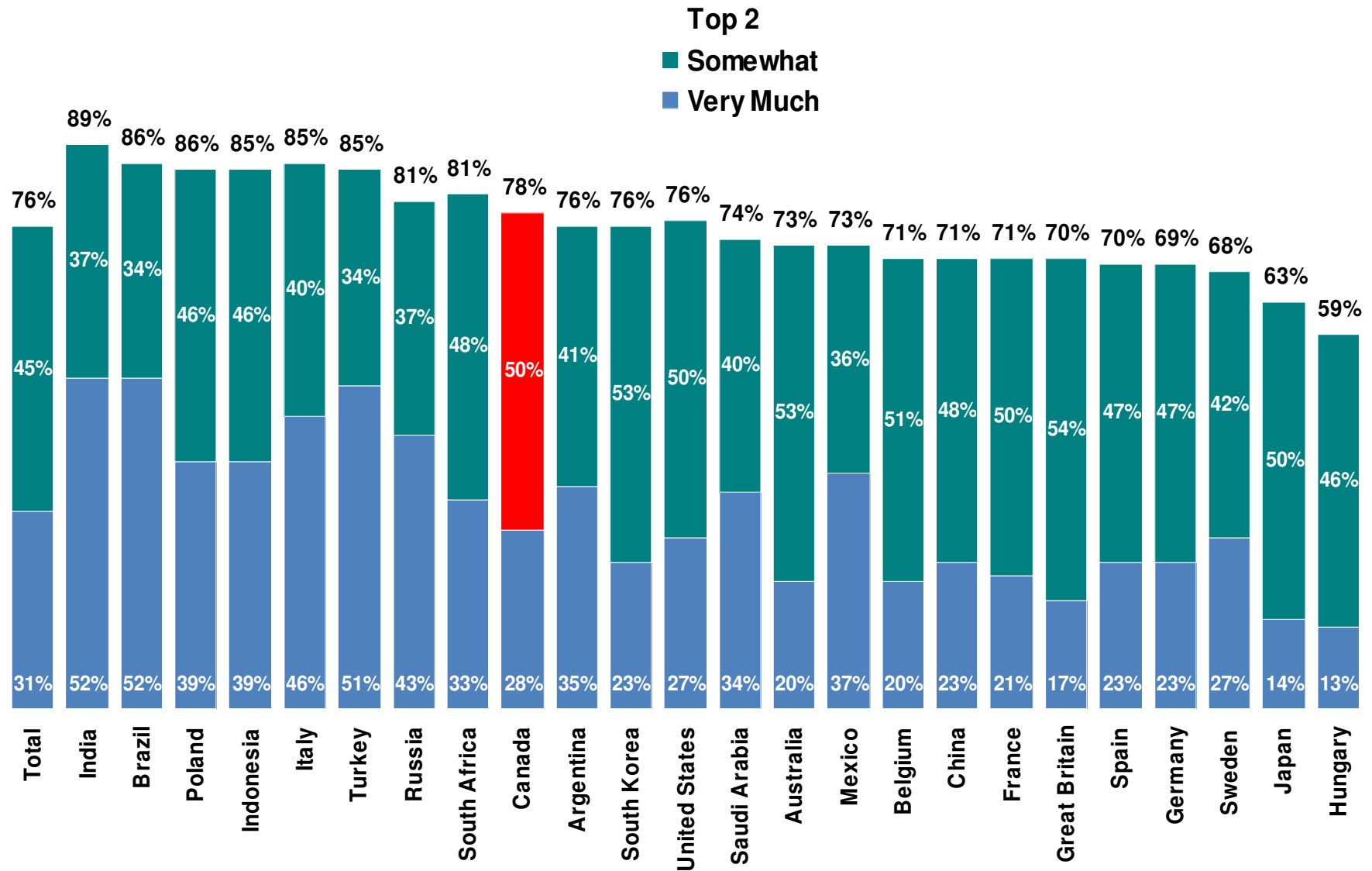
A composite image featuring a woman's face with green eyes and purple lips. The background is a world map with a blue ocean and brown/green landmasses. The woman's face is superimposed over the map, with her eyes looking directly at the viewer. The text 'Canada in a World of Innovation' is overlaid on the left side of the image.

# Canada in a World of Innovation

**Now, thinking about the people who work in the following sectors or areas of the economy here in X, how much do you think they share new and innovative ideas on how to make the things they do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all?**

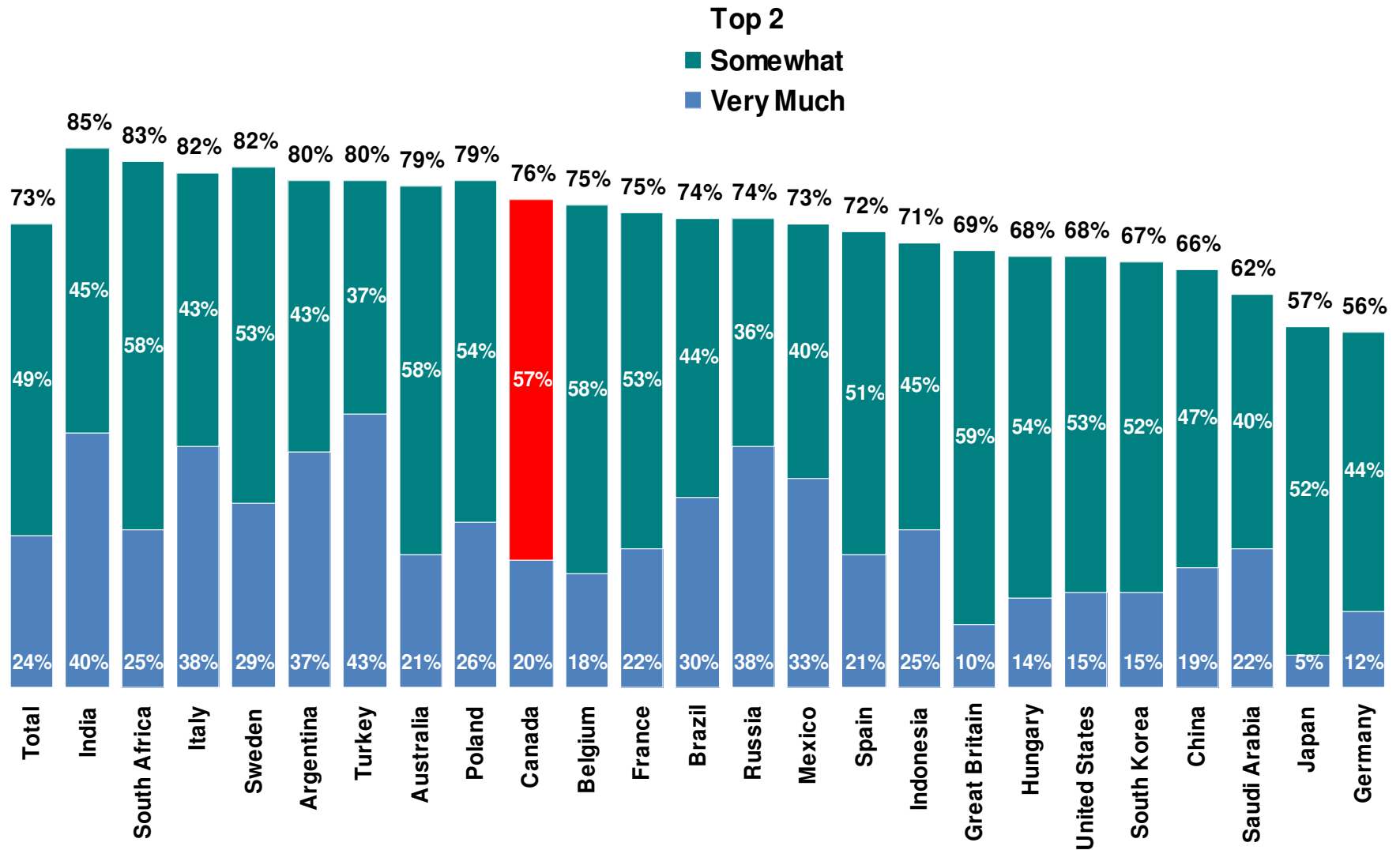


# TECHNOLOGY/TELECOM/COMPUTER Sector (76%)... **Canada: 78% (+2)** *Citizen Perceived Level of Innovation: India, Brazil, Poland...*



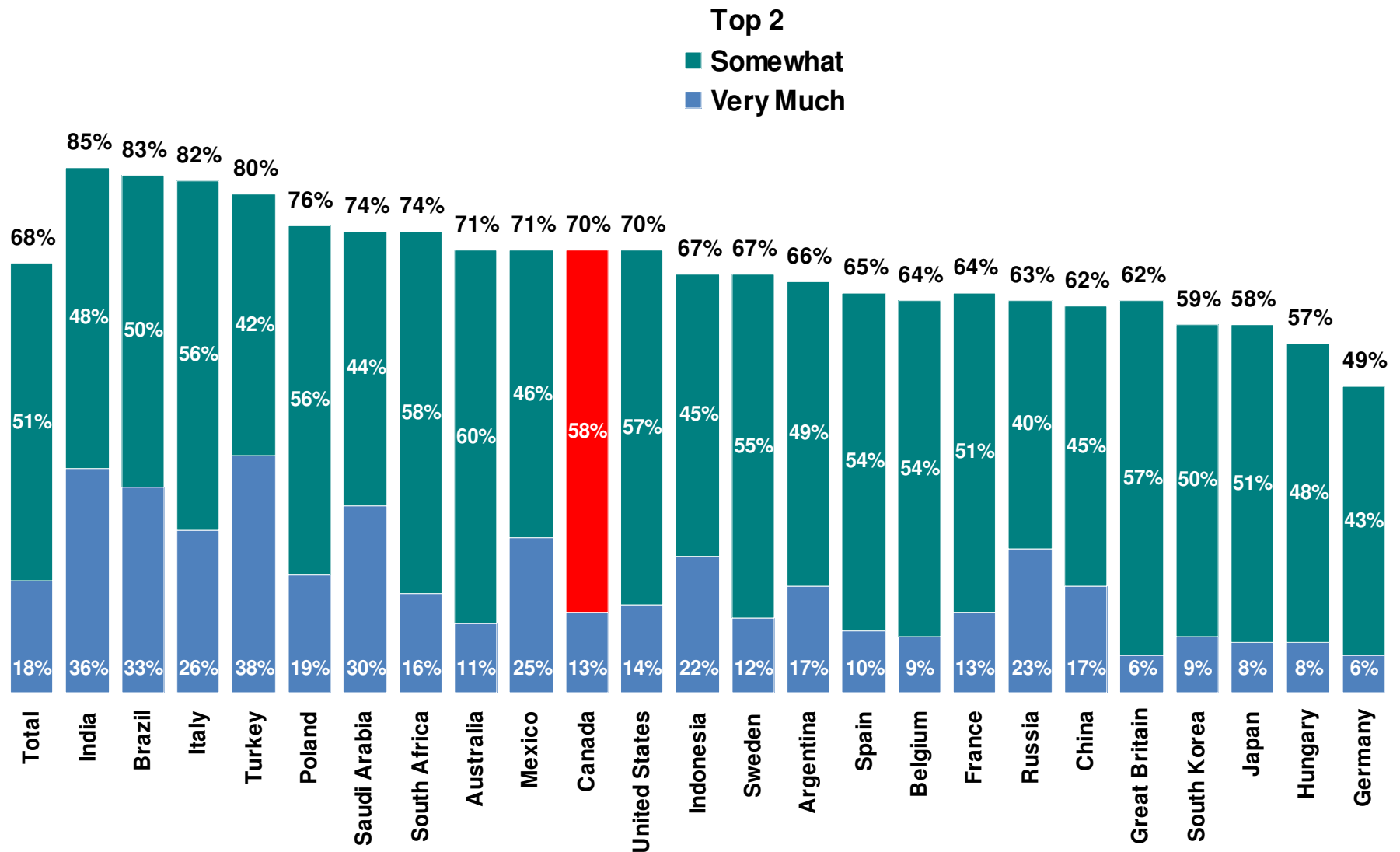
1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

**TOURISM Sector (73%)... **Canada 76%** (+3)**  
***Citizen Perceived Level of Innovation: India, South Africa, Italy...***



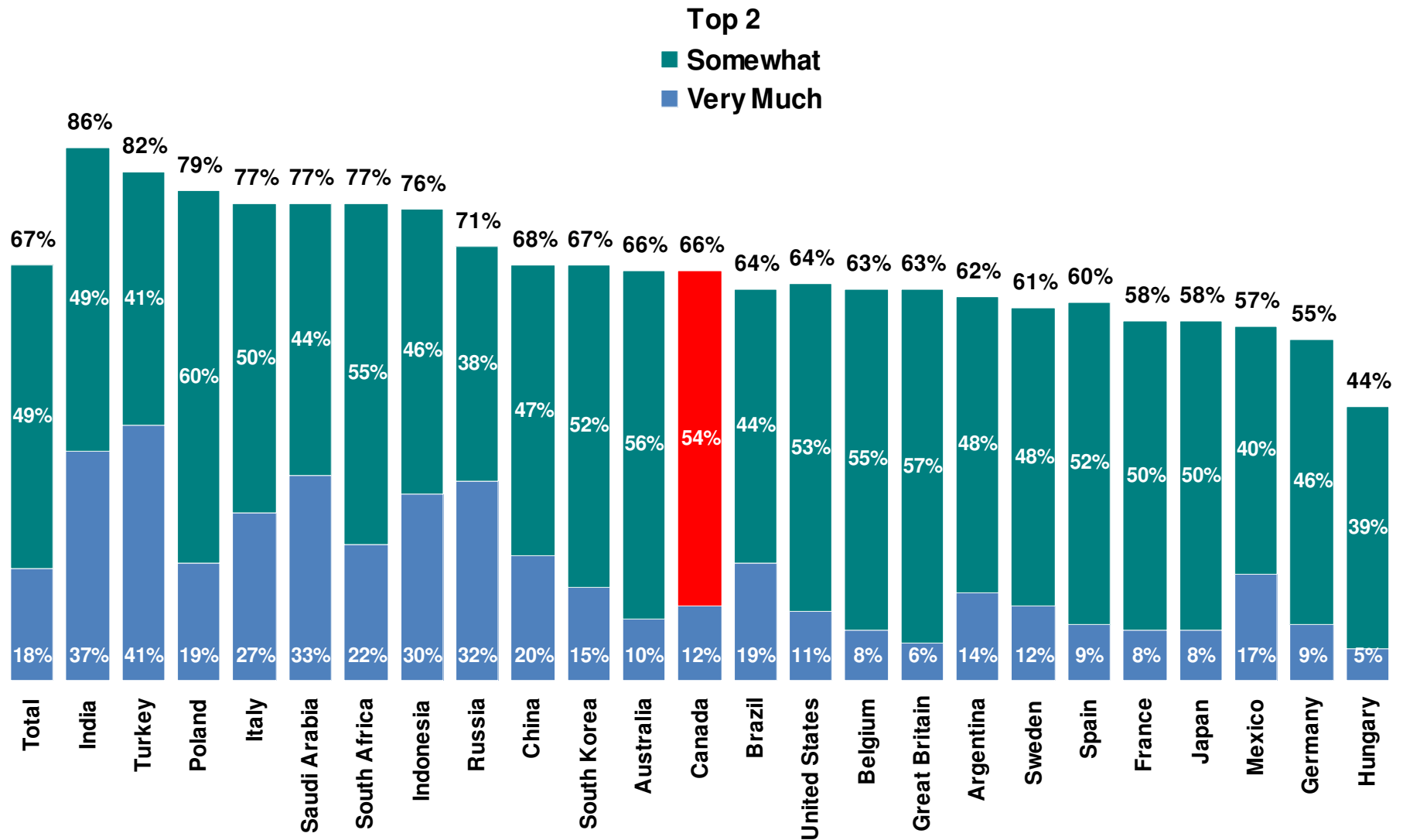
1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

# FOOD SERVICES Sector (68%)... **Canada 70%** (+2) *Citizen Perceived Level of Innovation: India, Brazil, Italy...*



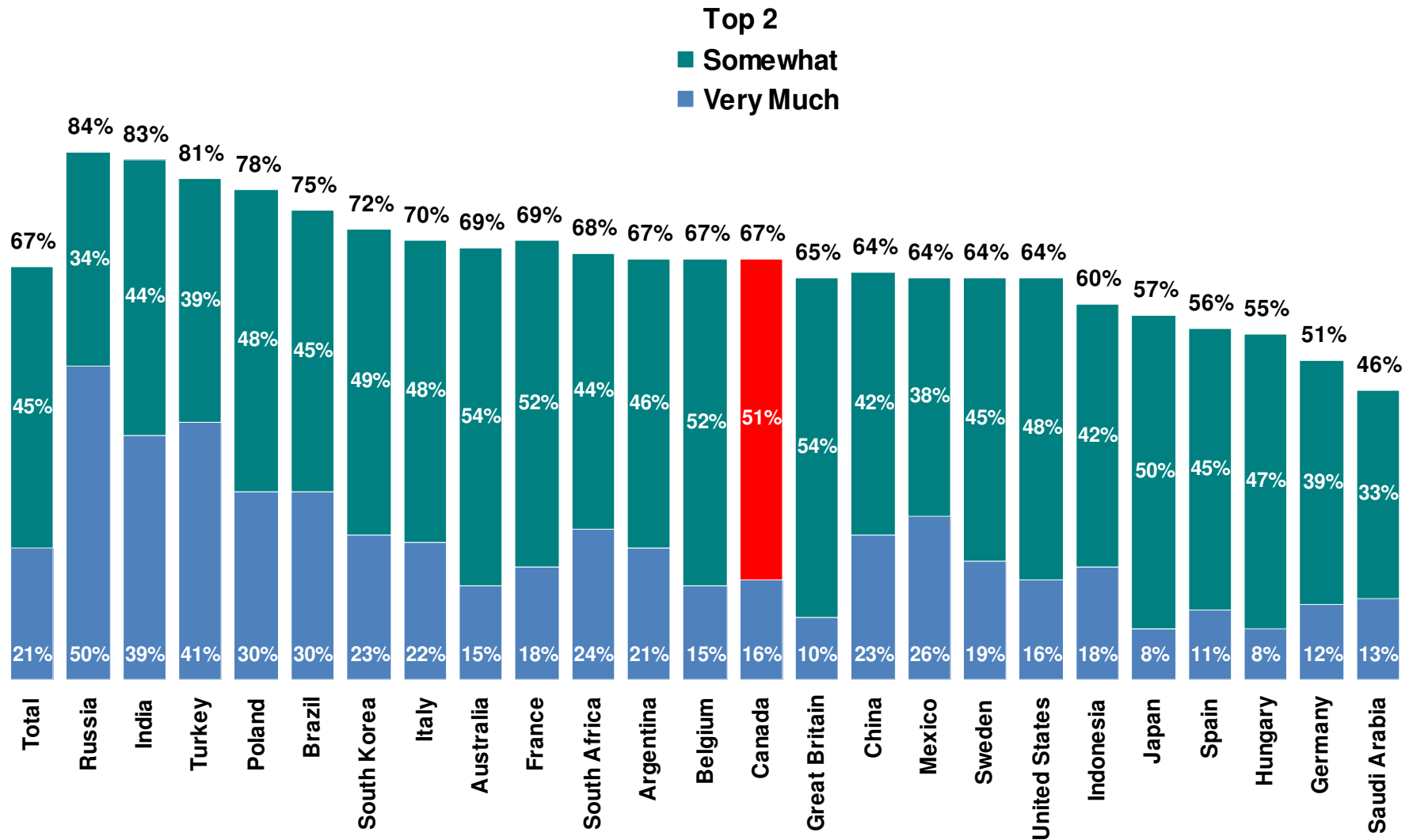
1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

# RETAIL/SHOPPING OUTLET/CHAINS Sector (67%)... **Canada 66%** (-1) *Citizen Perceived Level of Innovation: India, Turkey, Poland...*



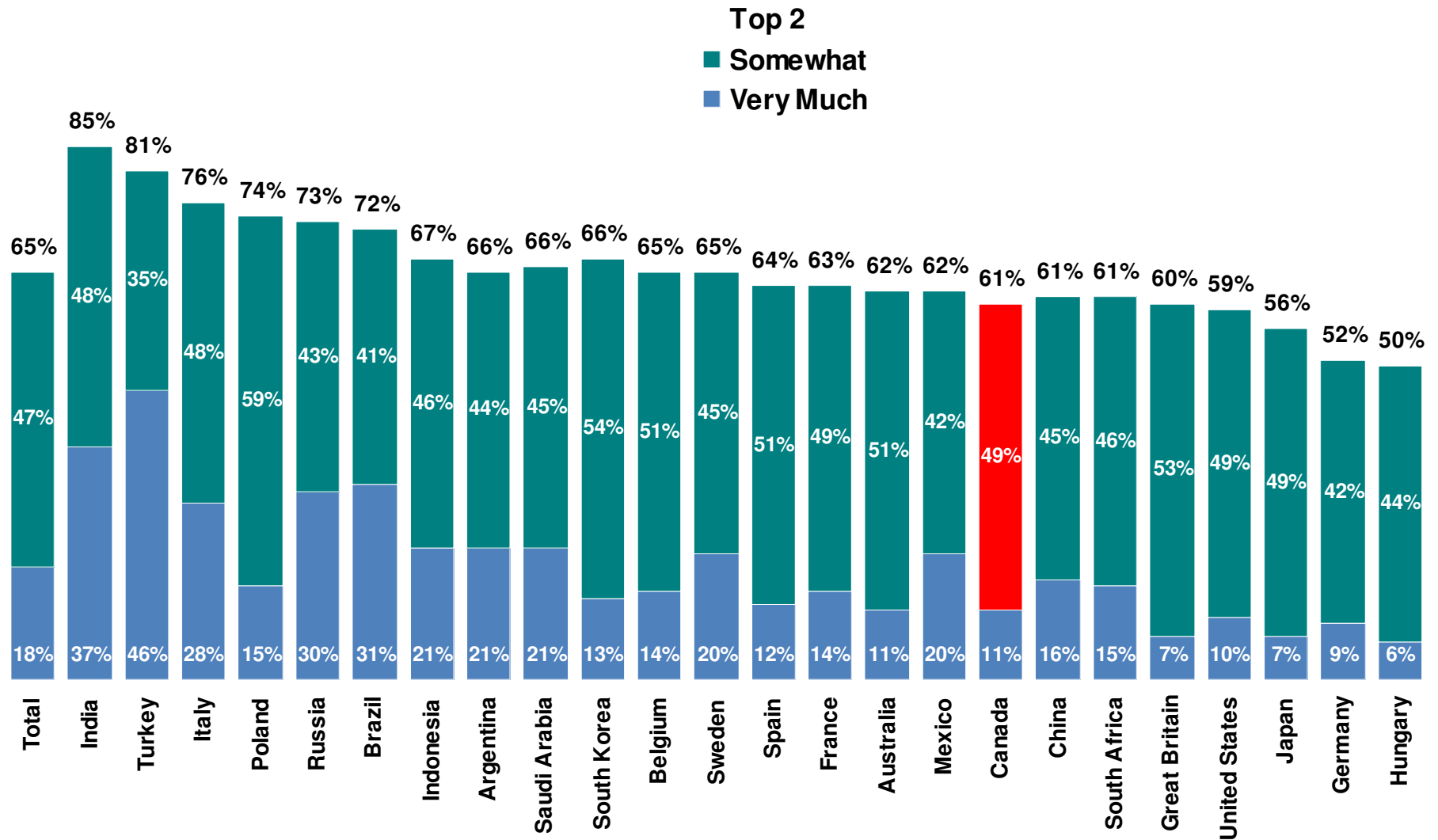
1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

# ENTERTAINMENT/MOVIES Sector (67%)... **Canada 67%** (-0) *Citizen Perceived Level of Innovation: Russia, India, Turkey...*



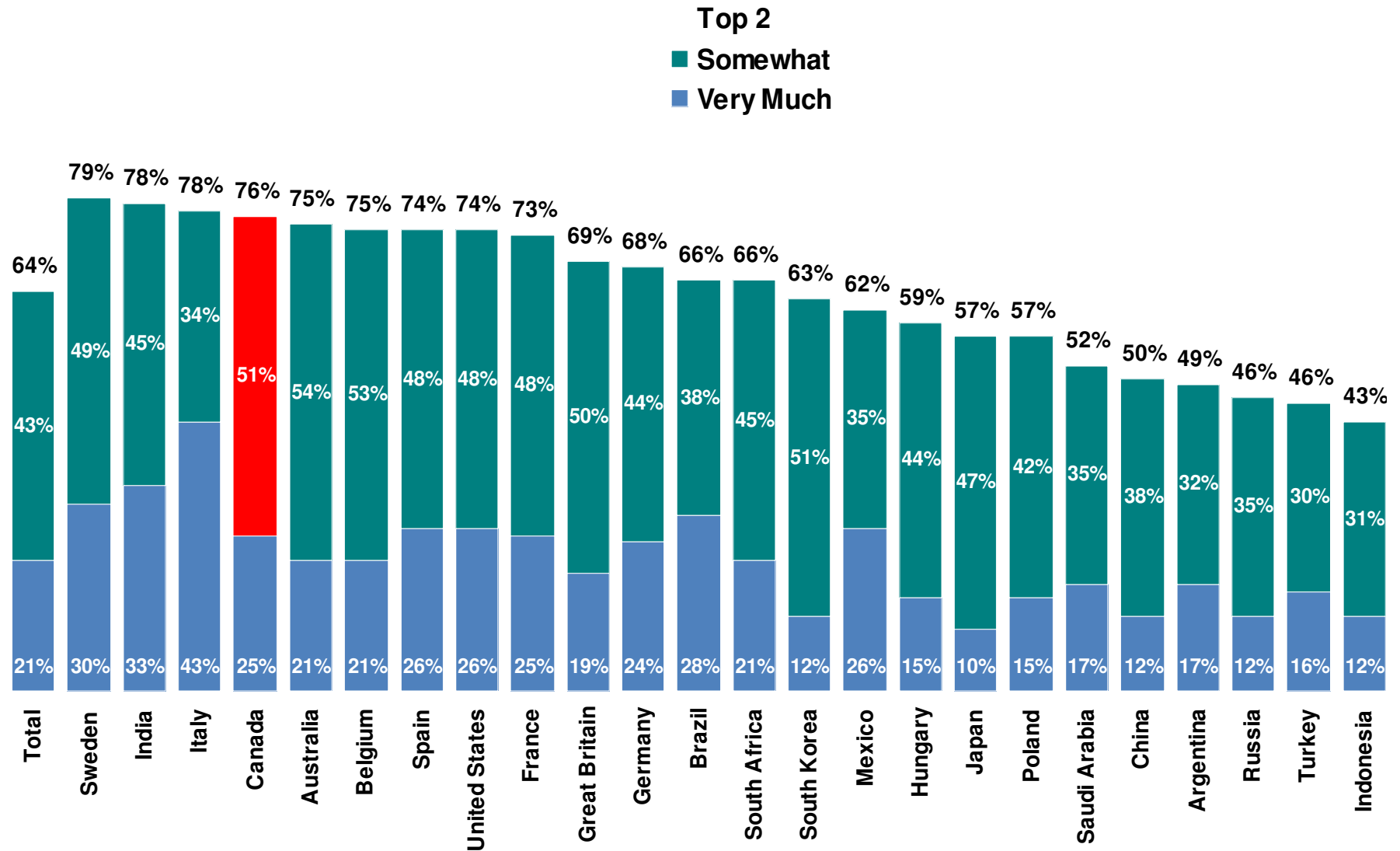
1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

# TEXTILE/FASHION Sector (65%)... **Canada 61%** (- 4) *Citizen Perceived Level of Innovation: India, Turkey, Italy...*



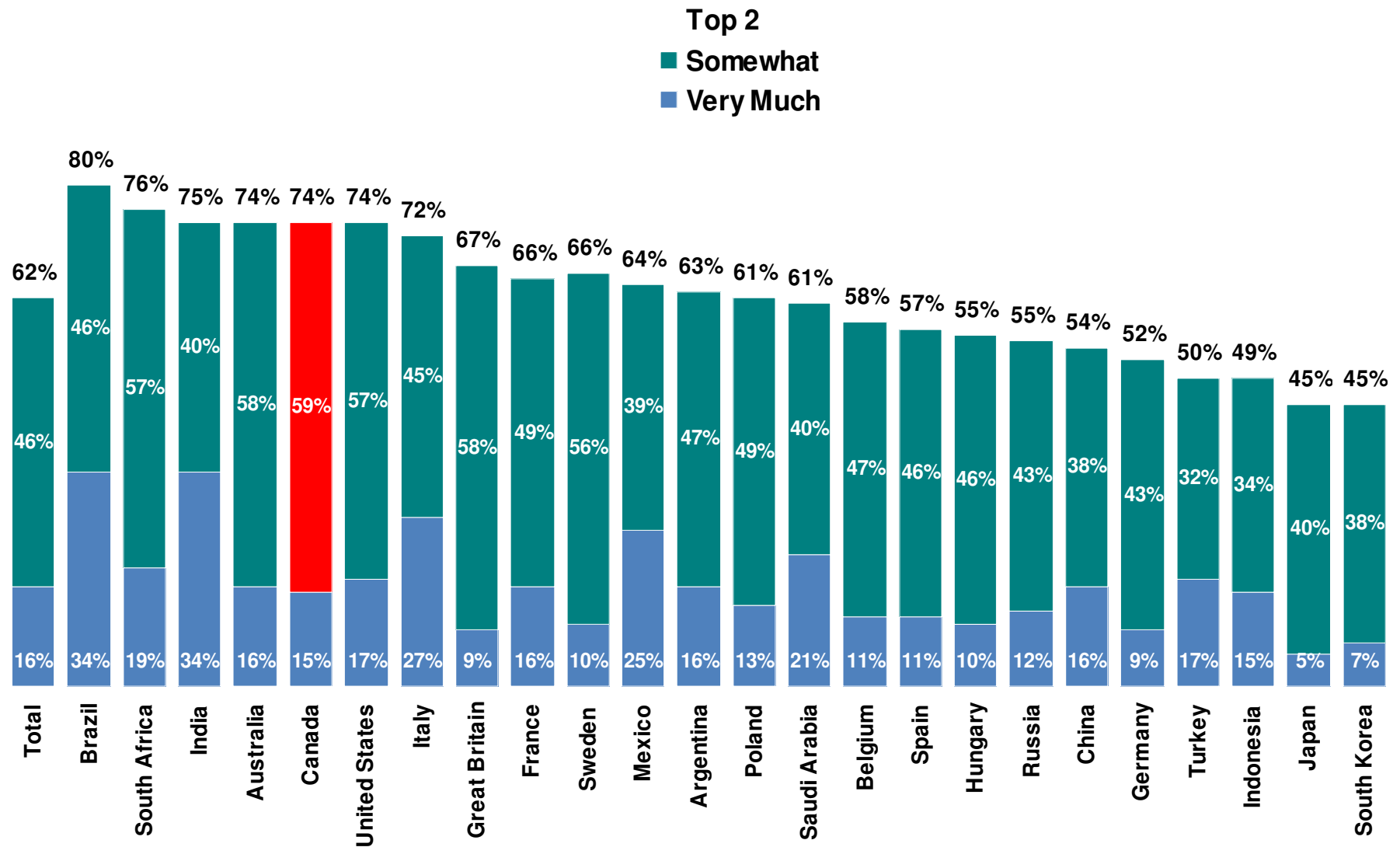
1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

# GREEN ENERGY/WIND /SOLAR PWR Sector (64%)... **Canada 76%** (+12) *Citizen Perceived Level of Innovation: Sweden, India, Italy...*



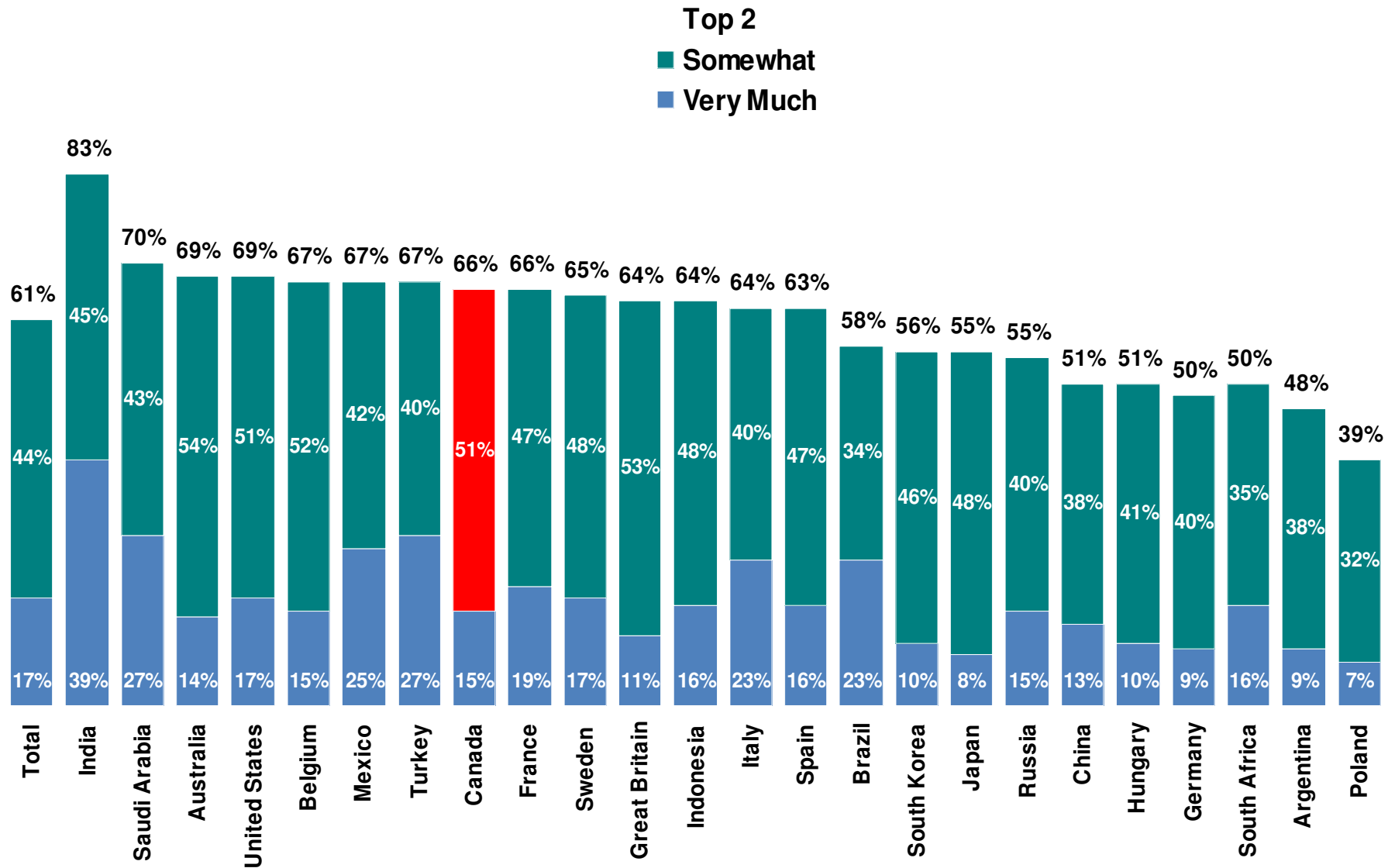
1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

# AGRICULTURAL Sector (62%)... **Canada 74%** (+12)... *Citizen Perceived Level of Innovation: Brazil, South Africa, India...*



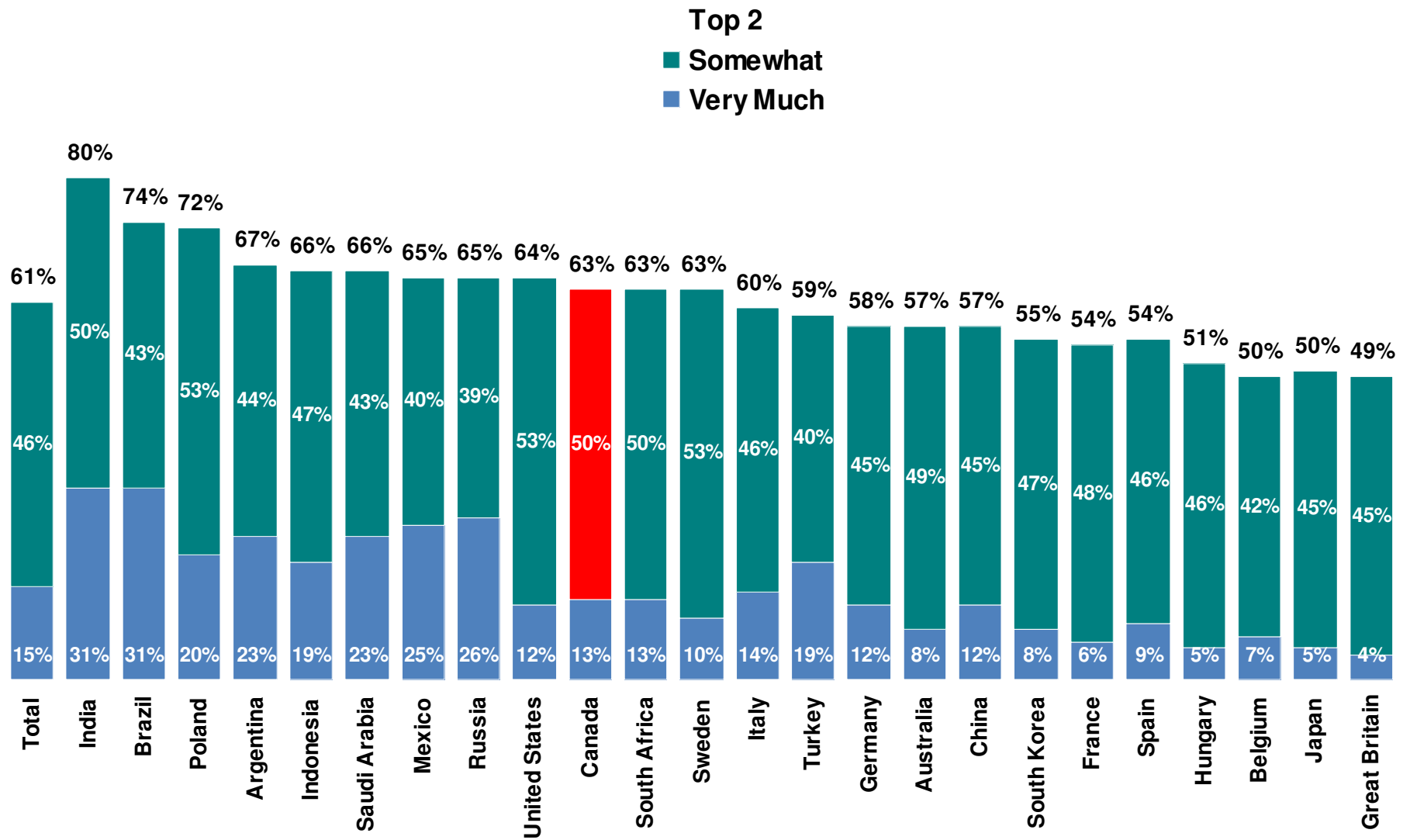
1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

# HOSPITAL/HEALTHCARE PROVIDER Sector (61%)... **Canada 66%** (+5) *Citizen Perceived Level of Innovation: India, Saudi Arabia, Australia...*



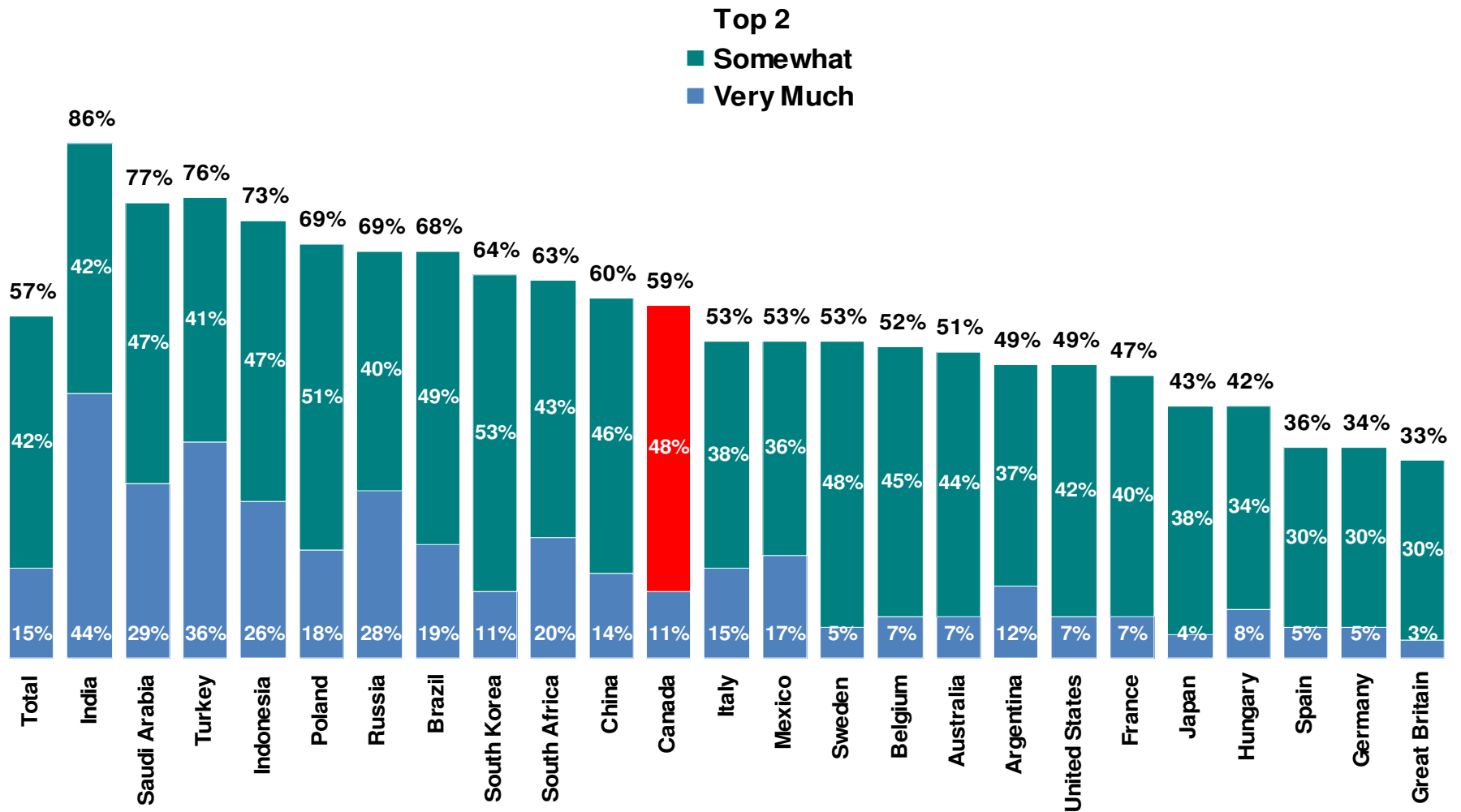
1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

# CAR/TRUCK/TRANSPORTATION Sector (61%)... **Canada 63%** (+2) *Citizen Perceived Level of Innovation: India, Brazil, Poland...*



1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

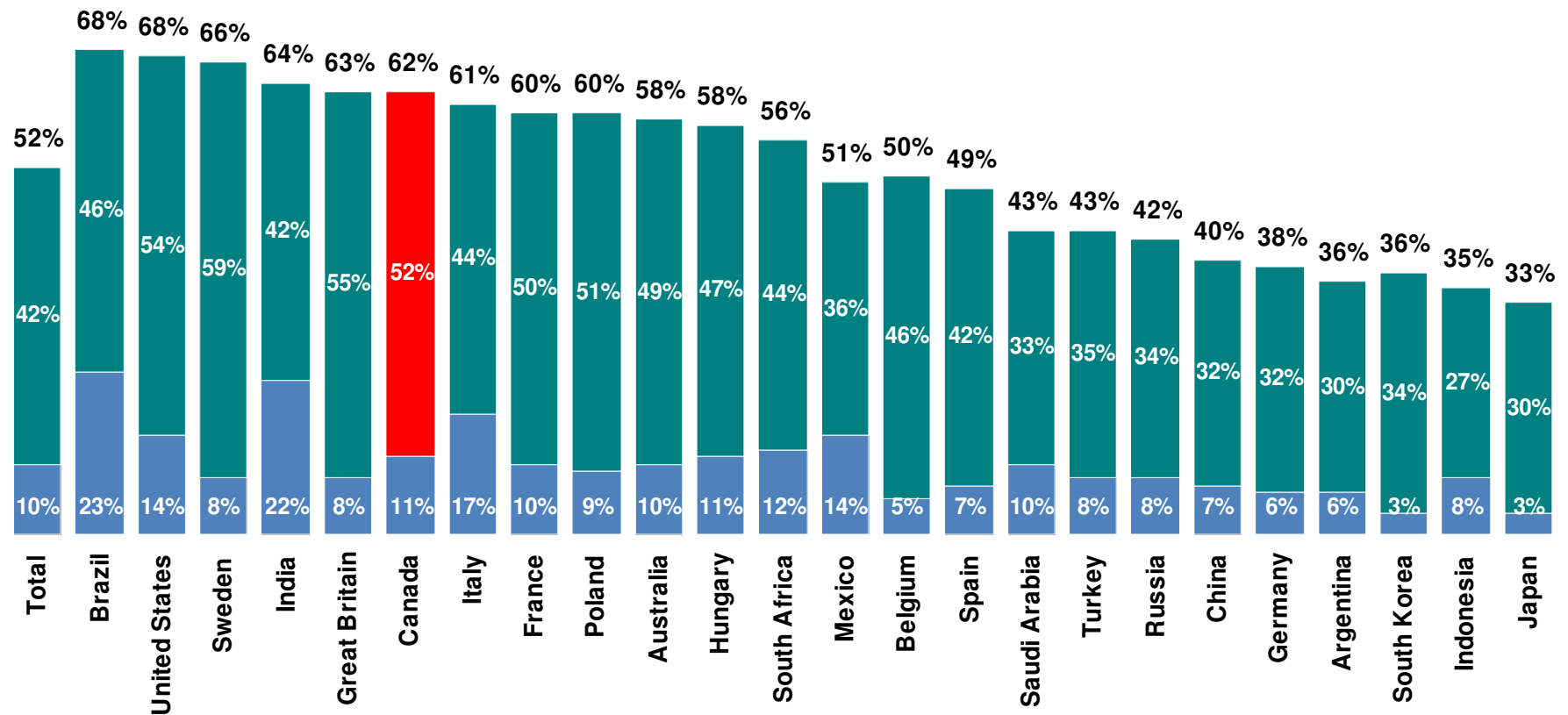
**BANK/INSURANCE/FIN SERVICE Sector (57%)... **Canada 59%** (+2)  
*Citizen Perceived Level of Innovation: India, Saudi Arabia, Turkey...***



1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

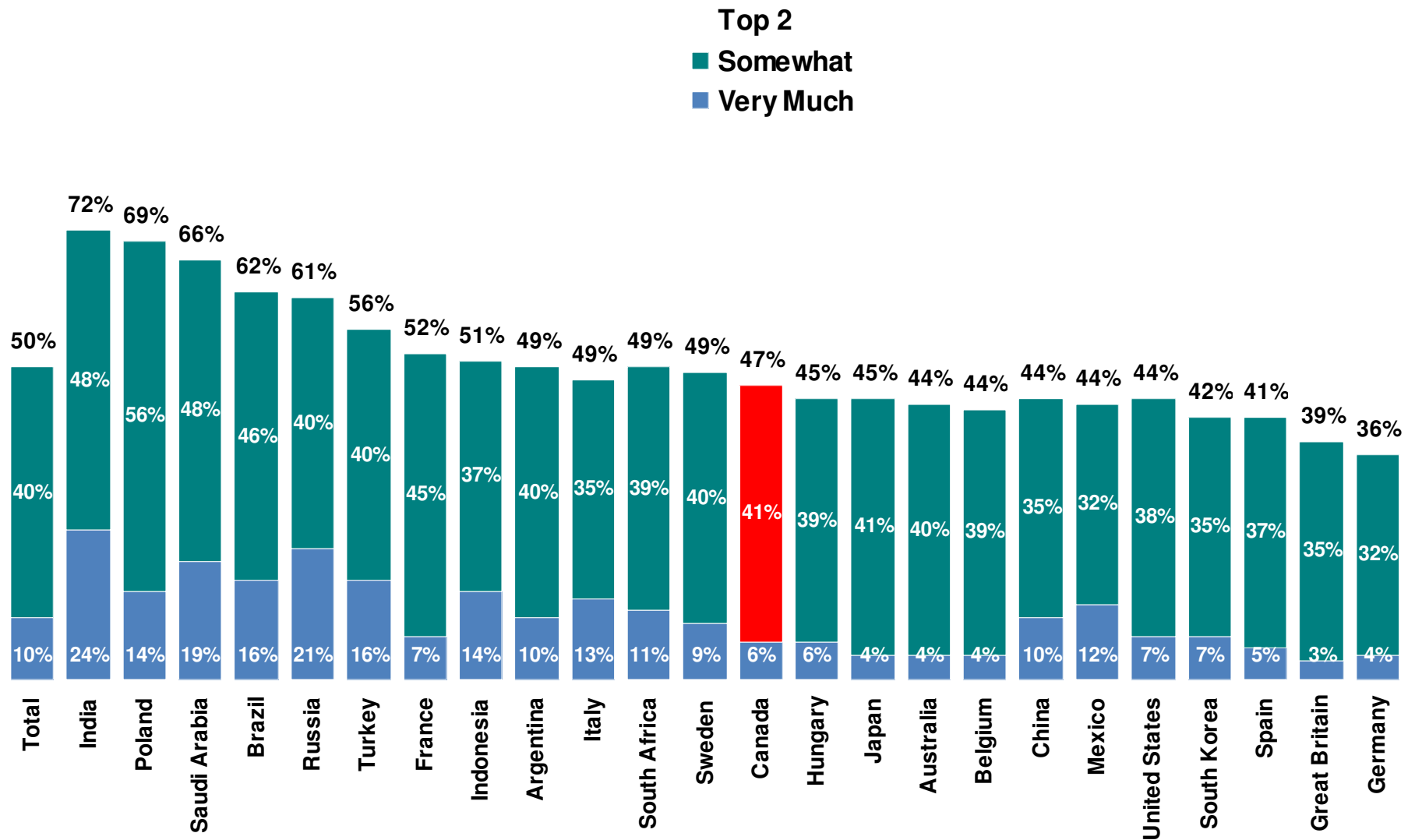
# FORESTRY Sector (52%)... **Canada 62%** (+10) *Citizen Perceived Level of Innovation: Brazil, US, Sweden...*

Top 2  
 ■ Somewhat  
 ■ Very Much



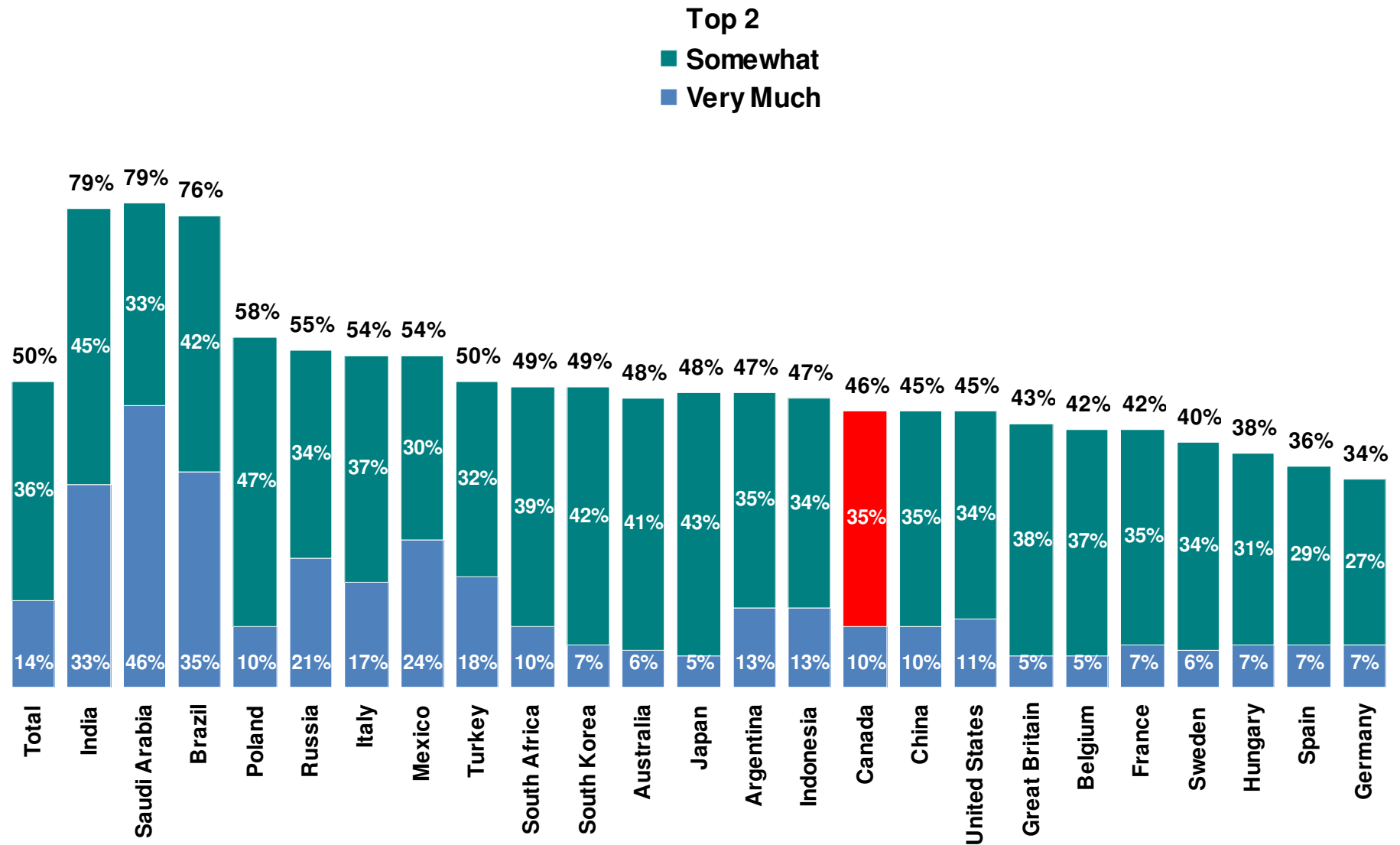
1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

**PROF SERVICES: LAWYERS/ACCTS Sector (50%)... **Canada 47%** (-3)  
*Citizen Perceived Level of Innovation: India, Poland, Saudi Arabia...***



1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

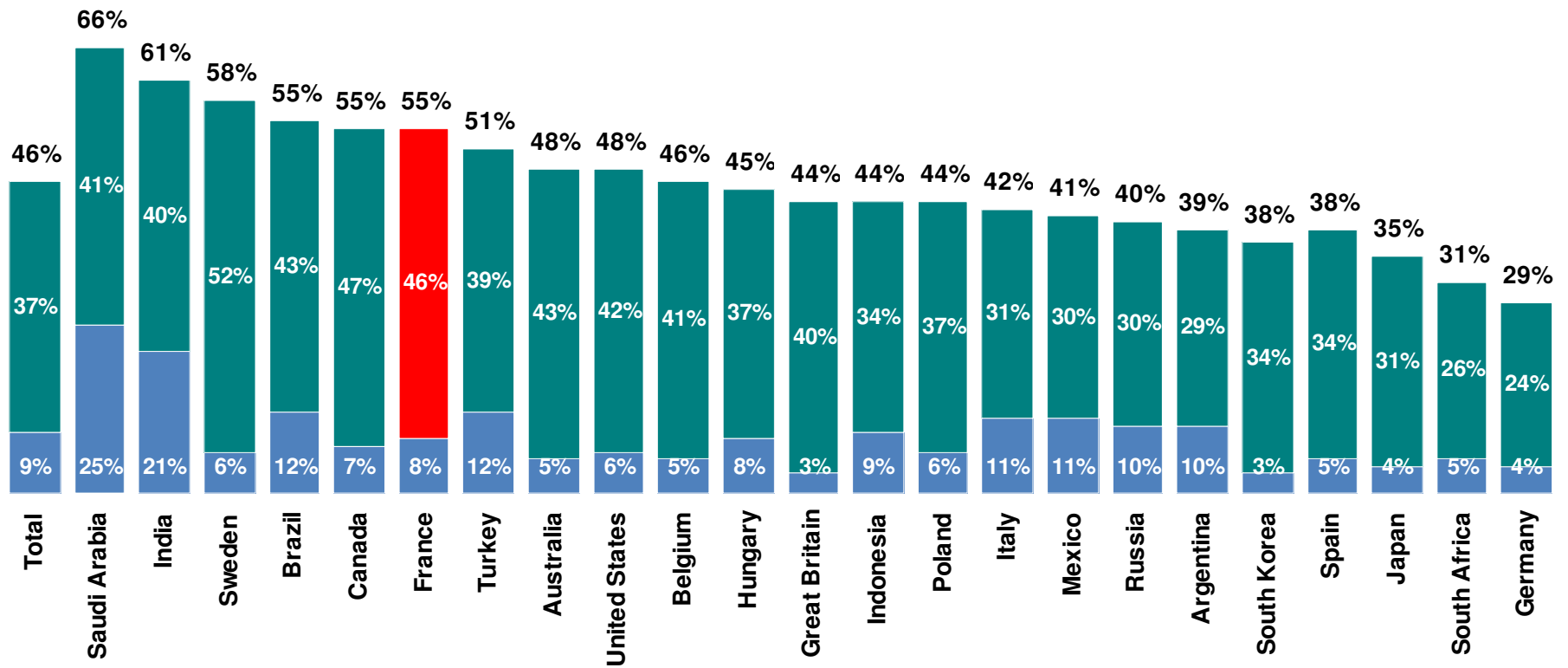
# OIL/GAS/FOSSIL FUEL ENERGY Sector (50%)... **Canada 46%** (- 4%) *Citizen Perceived Level of Innovation: India, Saudi Arabia, Brazil...*



1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

# LOCAL/MUNICIPAL GOVERNMENT Sector (46%)... **Canada 55%** (+9) *Citizen Perceived Level of Innovation: Saudi Arabia, India, Sweden...*

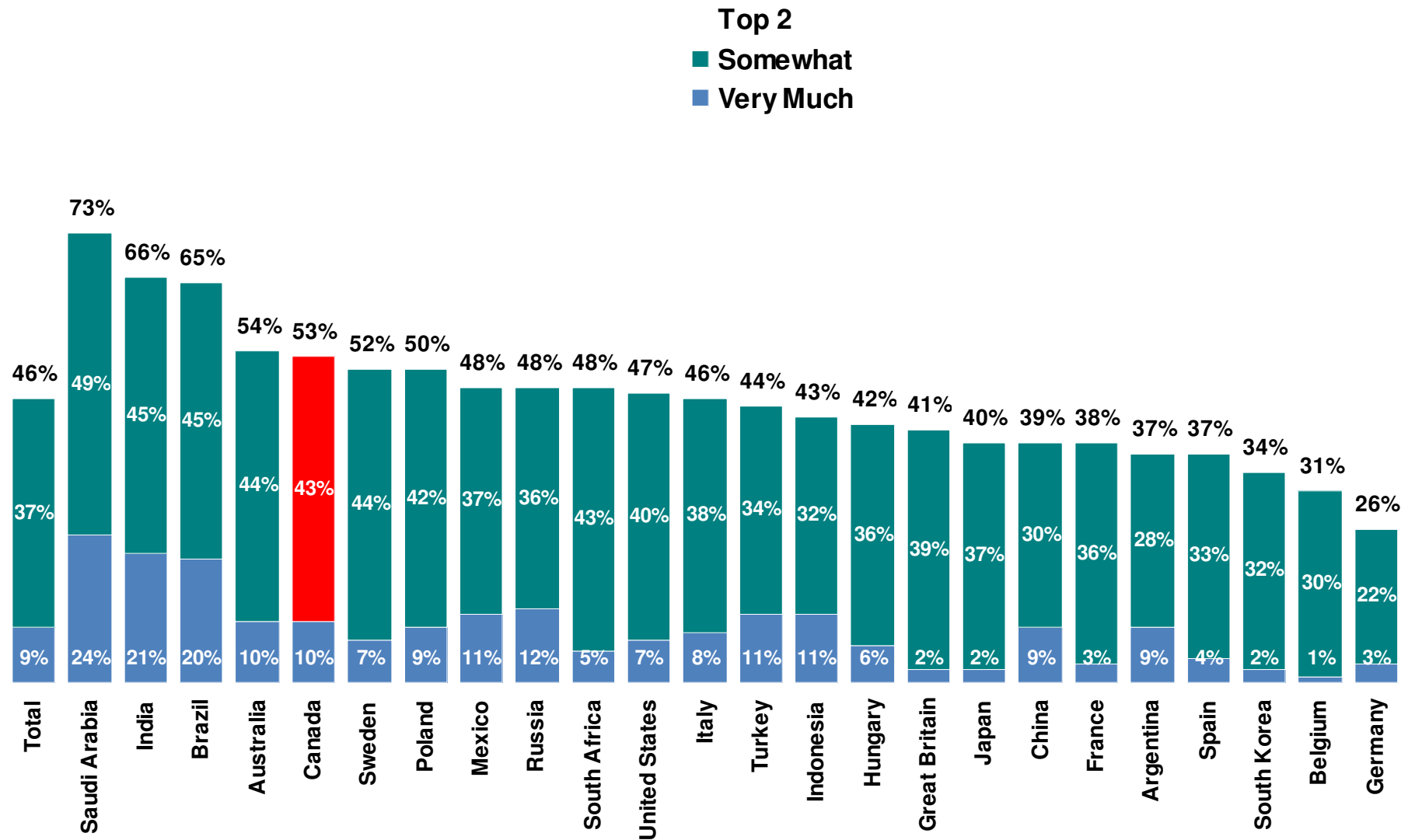
Top 2  
 ■ Somewhat  
 ■ Very Much



1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

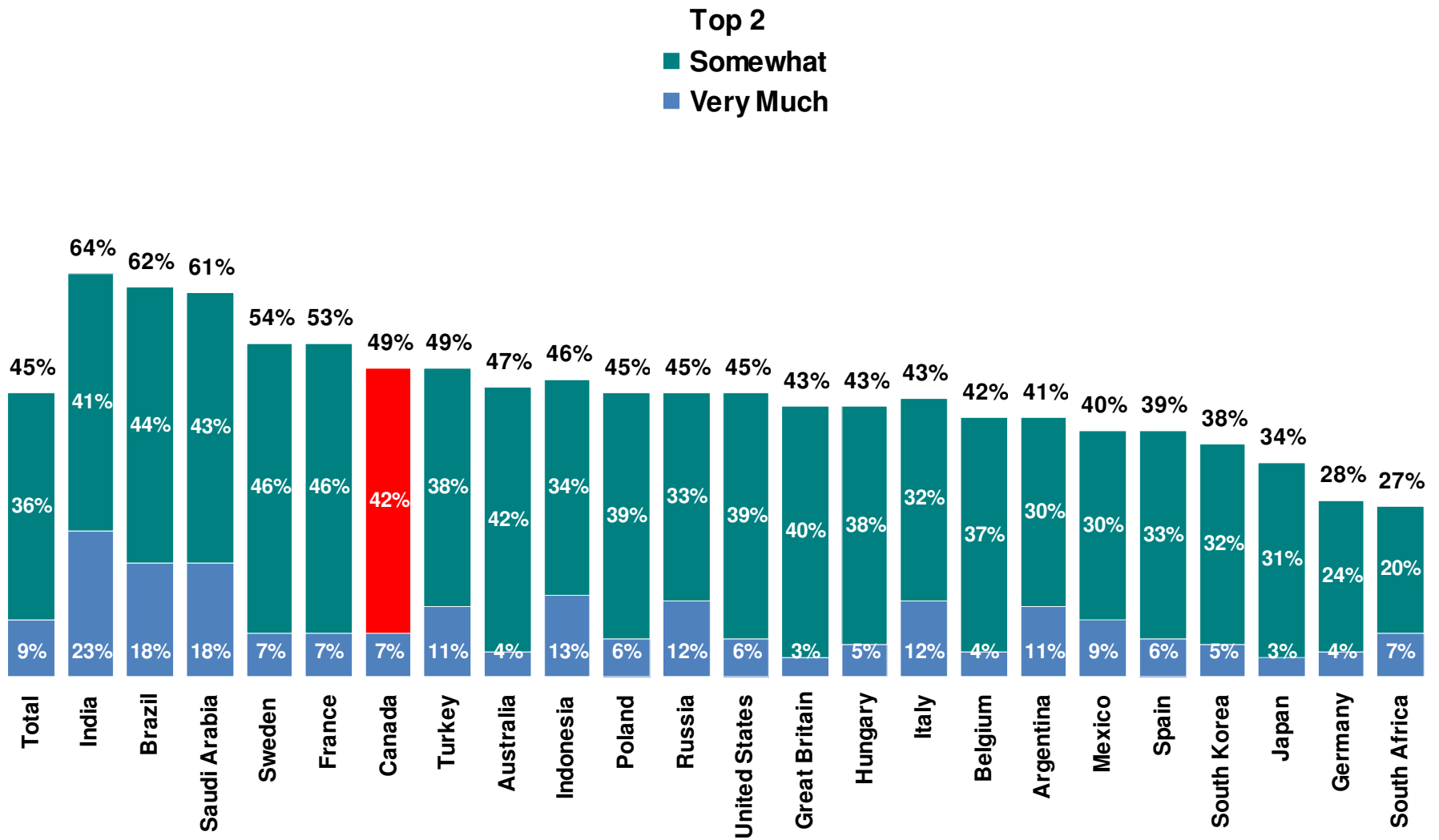
# MINING Sector (46%)... **Canada 53%** (+7)

*Citizen Perceived Level of Innovation: Saudi Arabia, India, Brazil...*



1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

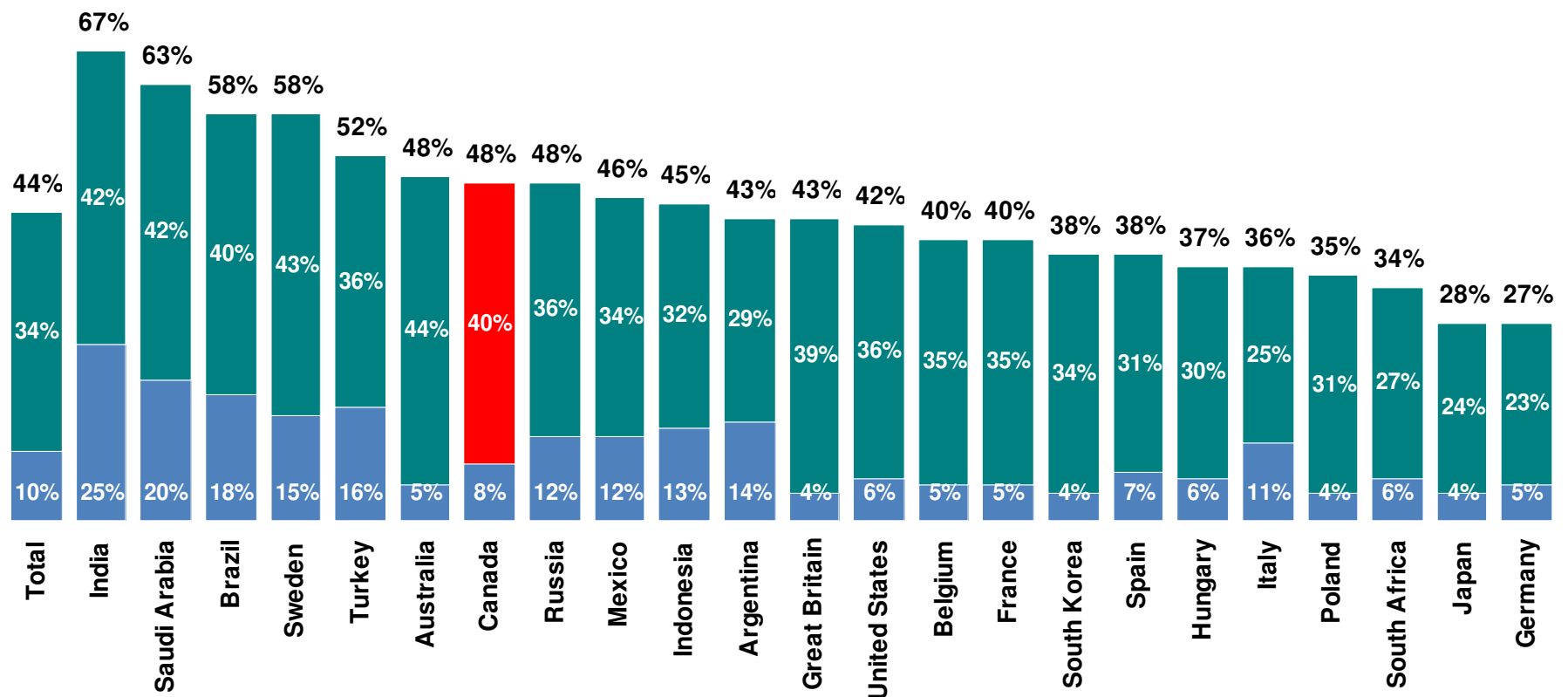
# REGION/STATE/PROV GOVERNMENT Sector (45%) ... **Canada 49%** (+4) *Citizen Perceived Level of Innovation: India, Brazil, Saudi Arabia...*



1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

# NATIONAL GOVERNMENT Sector (44%)... **Canada 48%** (+4) *Citizen Perceived Level of Innovation: India, Saudi Arabia, Brazil...*

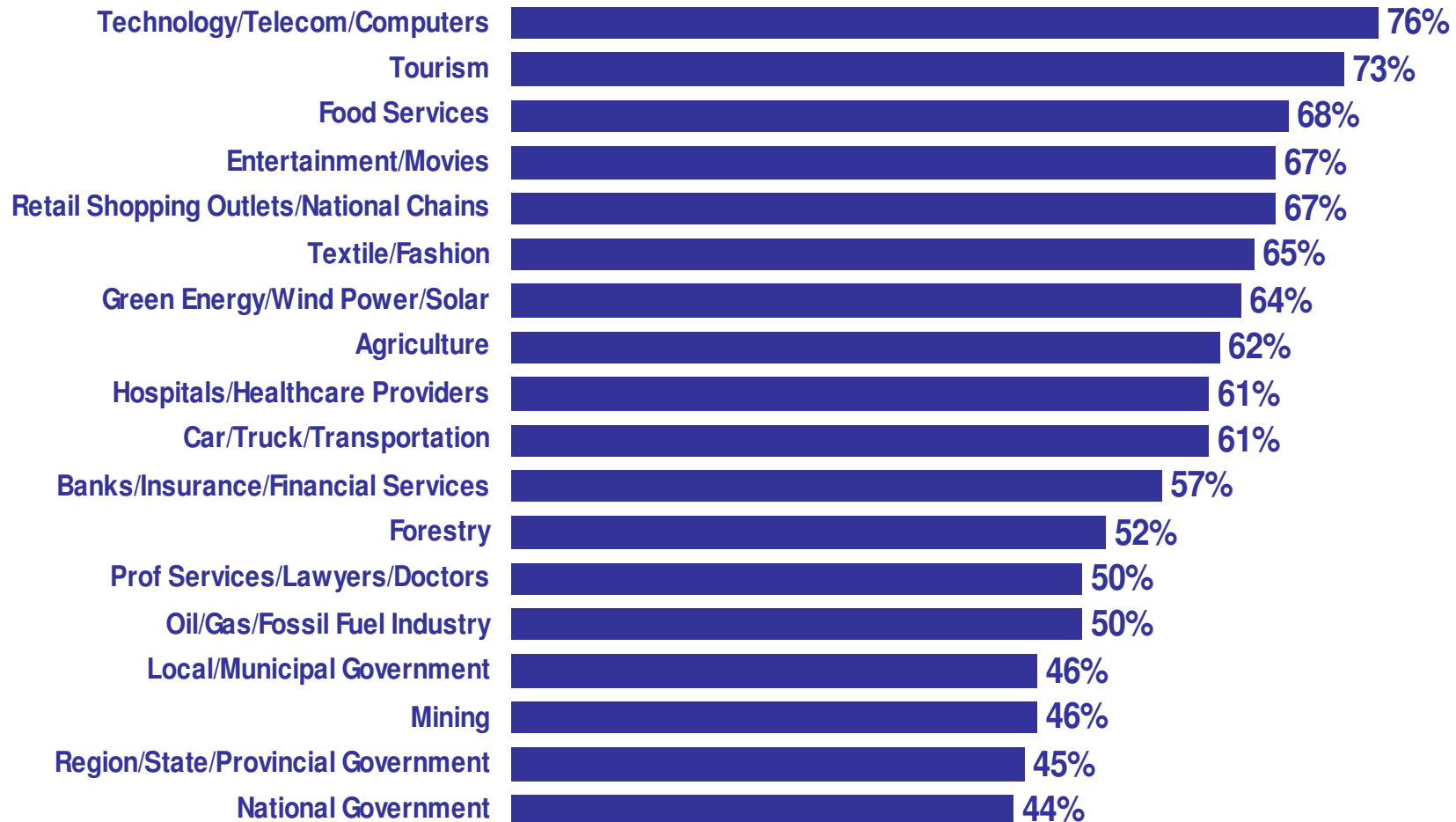
Top 2  
 ■ Somewhat  
 ■ Very Much



1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: All Respondents n=18787

# Global Citizens Rank Innovation By Sector...

% Very Good / Somewhat Good



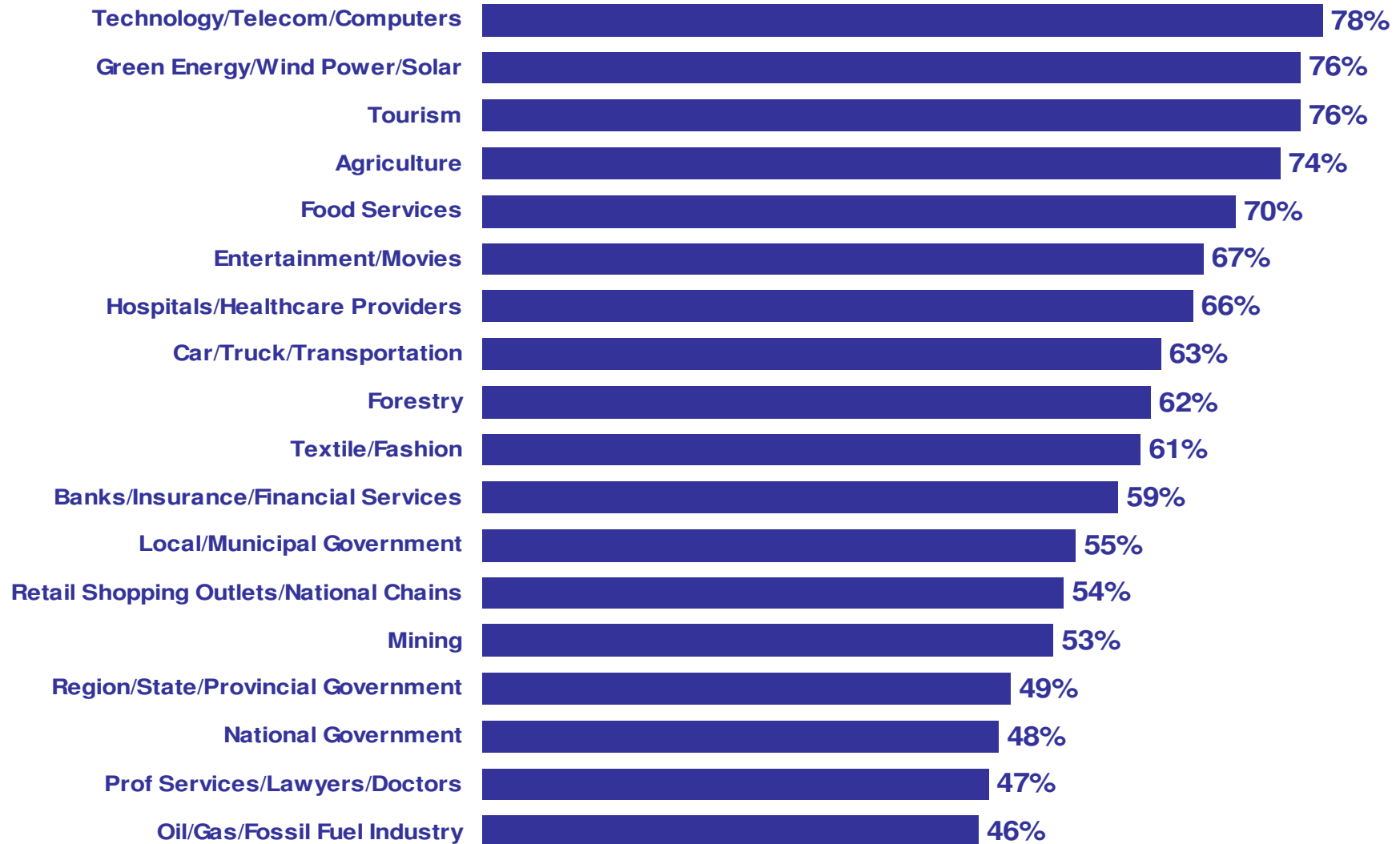
1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: Canada 1001



**Canadians  
and  
Perceptions  
of  
Innovation**

# Canadians Rank Innovation in their own Country by Sector...

% Very Good / Somewhat Good



1. Now, thinking about the people who work in the following sectors or areas of the economy here in [insert country], how much do you think they share new and innovative ideas on how to make the things do or produce better for their organization or the people they serve? Would it be very much, somewhat, not very much or not at all? Base: Canada 1001

## How **Canadian Sectors Rank Globally** By Citizen Perceptions of Innovation in their Own Country...

■ Green Energy/Wind Power/Solar	4th
■ Agriculture	5th
■ Mining	5th
■ <b>Region/State/Provincial Government</b>	<b>6th</b>
■ <b>Local/Municipal Government</b>	<b>6th</b>
■ Forestry	6th
■ <b>National Government</b>	<b>7th</b>
■ Hospitals/Healthcare Providers	8th
■ Technology/Telecom/Computers	9th
■ Tourism	9th
■ Food Services	10th
■ Car/Truck/Transportation	10th
■ Banks/Insurance/Financial Services	11th
■ Retail Shopping Outlets/National Chains	12th
■ Prof Services/Lawyers/Doctors	13th
■ Entertainment/Movies	13th
■ Oil/Gas/Fossil Fuel Industry	15th
■ Textile/Fashion	17th

**The  
Workplace  
and  
Creating  
the Culture  
of  
innovation**



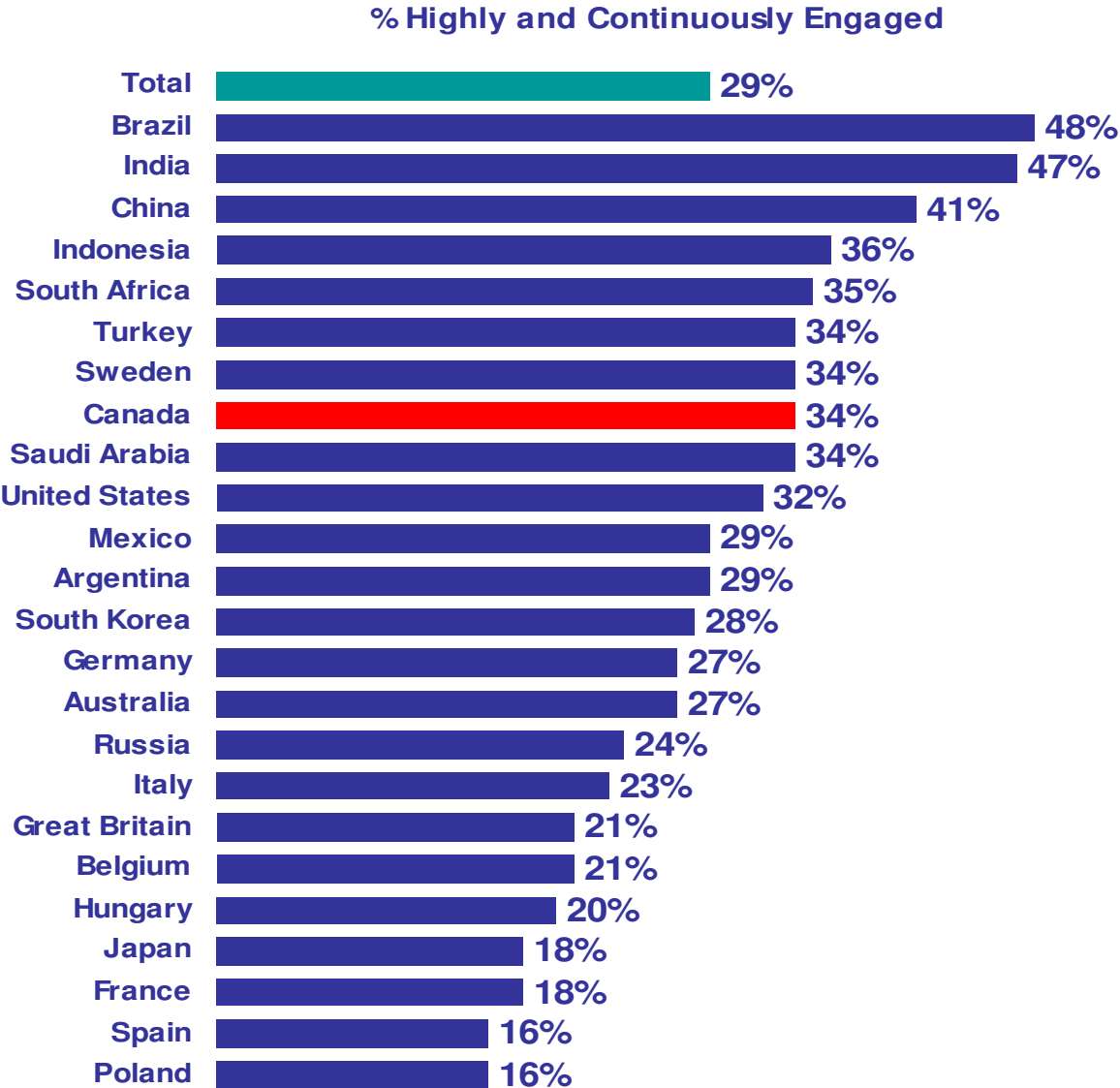
## How Would You Best Describe Your Workplace? [EMPLOYEES ONLY]

HIGH	MODERATE	LOW / NON-EXISTENT
<p data-bbox="113 354 705 802">Has created an environment where it's a priority to openly listen, encourage, recognize/reward employees to share new and innovative ideas on how to make the things they do or produce better for their organization or the people they serve.</p> <p data-bbox="113 912 705 1107"><i>This would be a highly and continuously engaged workplace for innovation development and application.</i></p>	<p data-bbox="745 354 1337 902">Has put in place some ways for employees to put forward innovative ideas and solutions where some are accepted and others are not because it's not really a top priority to do anything to make the things they do or produce better for their organization or they people they serve.</p> <p data-bbox="745 964 1337 1159"><i>This would be a moderate to limited engaged workplace for innovation development and application.</i></p>	<p data-bbox="1381 354 1953 750">Doesn't encourage or really make an attempt to listen to employees where they can share new and innovative ideas on how to make the things they do or produce better for their organization or they people they serve.</p> <p data-bbox="1381 912 1953 1107"><i>This would be a low or non-existent engaged workplace for innovation development and application.</i></p>

**Has created an environment where it's a priority to openly listen, encourage, recognize/reward employees to share new and innovative ideas on how to make the things they do or produce better for their organization or the people they serve.**

***This would be a highly and continuously engaged workplace for innovation development and application.***

# Employees Identify a *Highly And Continuously Engaged Workplace* For Innovation (29%)...**Canada 34% (+5)**

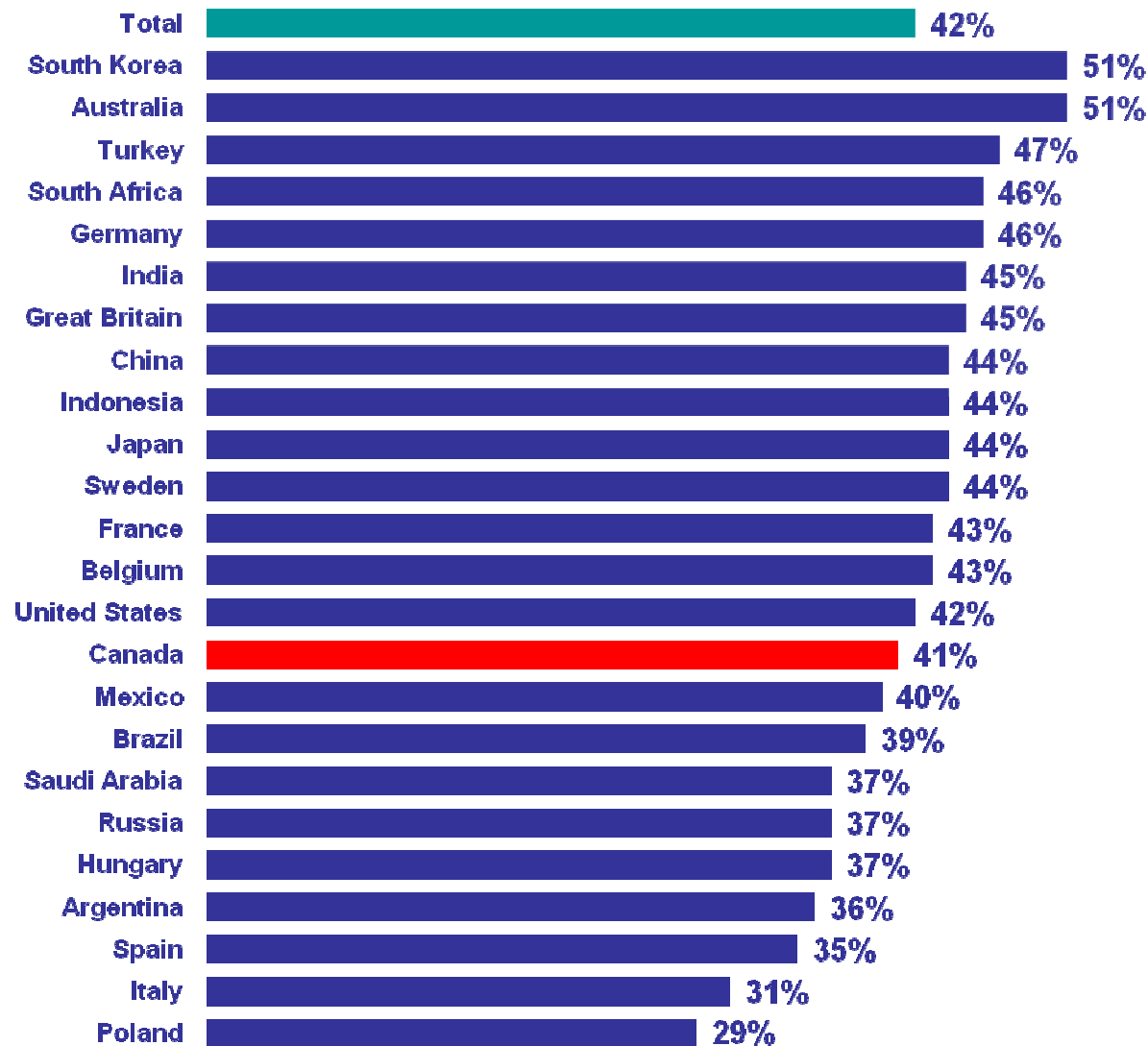


Has put in place some ways for employees to put forward innovative ideas and solutions where some are accepted and others are not because it's not really a top priority to do anything to make the things they do or produce better for their organization or the people they serve.

*This would be a **moderate to limited engaged workplace** for innovation development and application.*

# Employees Identify a *Moderate To Limited Engaged Workplace* For Innovation (42%)...**Canada 41% (-1)**

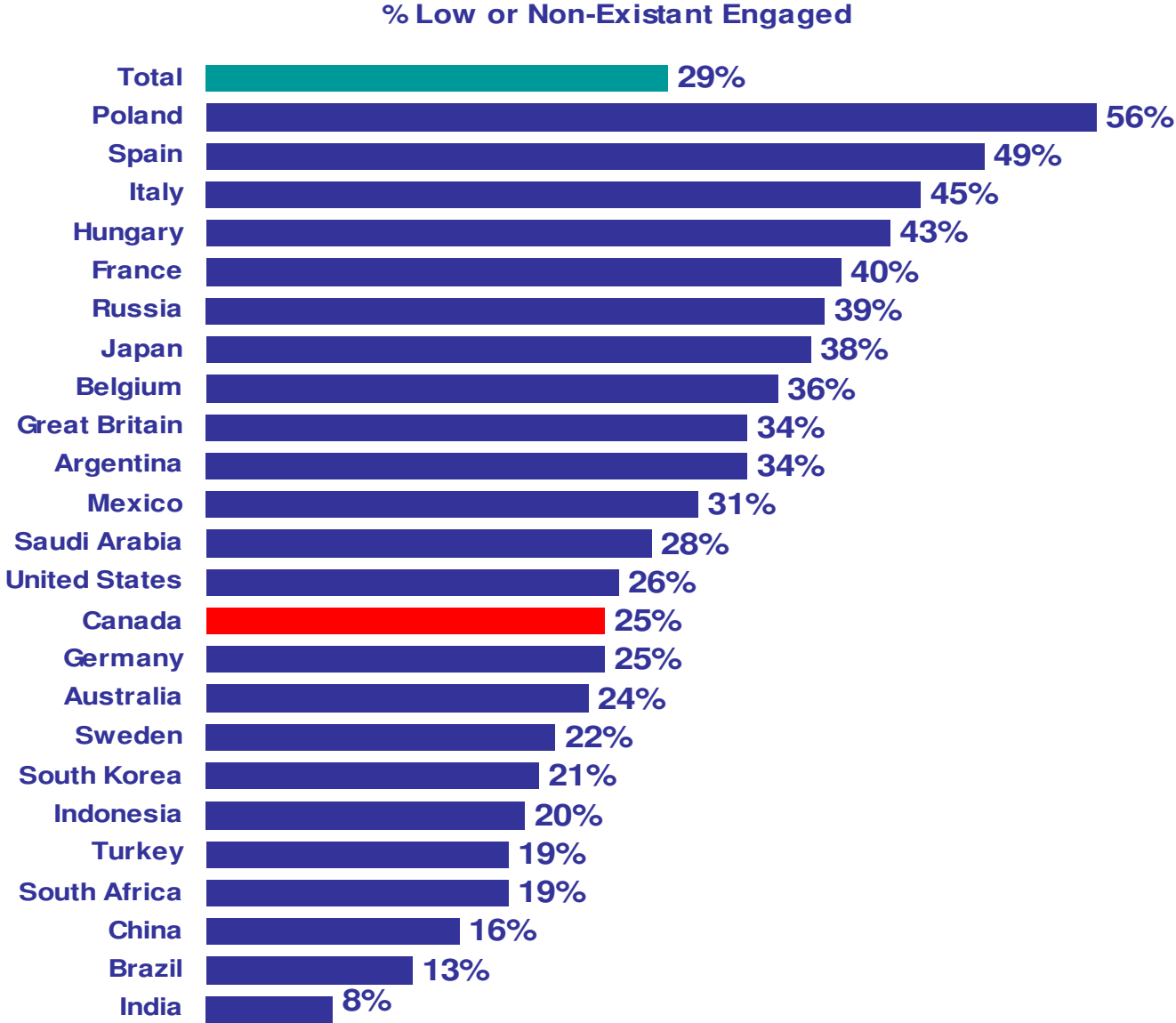
% Moderate to Limited Engaged



**Doesn't encourage or really make an attempt to listen to employees where they can share new and innovative ideas on how to make the things they do or produce better for their organization or the people they serve.**

***This would be a **low or non-existent engaged** workplace for innovation development and application.***

# Employees Identify a *Low or Non-Existent Engaged Workplace* For Innovation (29%)...Canada 25% (- 4)



# Some Final Thoughts...

DARRELL BRICKER & JOHN WRIGHT

# CANUCKOLOGY



**FROM DOLLARS TO DONUTS**

CANADA'S PREMIERE POLLSTERS REVEAL  
WHAT CANADIANS THINK AND WHY

**Oh Canada, eh?**

**Assuming What Your Target Audience Can  
Sometimes Make an...  
Undeniable Difficulty**

**The Canada We've Known Is Changing...Rapidly...  
And *THAT's* the **BIG Citizen Consumer Shift...****

**The World Economy is Fairly Stagnant...But  
Canada is Robust...the Outlook for Consumer  
Spending: Good**

**Through Rapid Turnaround Monthly Polling,  
Nations Have Context: What and How the Global  
Community Thinks, Approves and Ranks**

# **Innovation**

**Understanding the Output of Innovation is Based  
on the Measurement of its Definition**

**Innovation is Not the Result of a Blazing Insight or  
Advances in Technology**

**Innovation is a Culture Nurtured by Conditions:  
It is Not a Thing But a Way of Doing Things**

**Perceptions of Sector Innovation are Relatively  
Relative, and Mainly Benign**

# Innovation

**What's Most Important is to Understand if Workers Believe **They're Part of an Innovation Process** In Canada, it Means We have Worker Assessed Workplaces:**

**34%** are Highly Engaged in Innovation Culture  
— 5 Points ahead of the World Average

**41%** are Moderately Engaged in Innovation Culture  
— 1 Point Below the World Average

**25%** Have a Low or Non-Existent Innovation Culture  
— 4 Points Less than the World Average

**And Frankly, These Numbers Matter Most...**

**Thank You Very Much**

DARRELL BRICKER & JOHN WRIGHT

# **CANUCKOLOGY**



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