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Roper reports Canada : top line  
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**ROPER REPORTS CANADA**

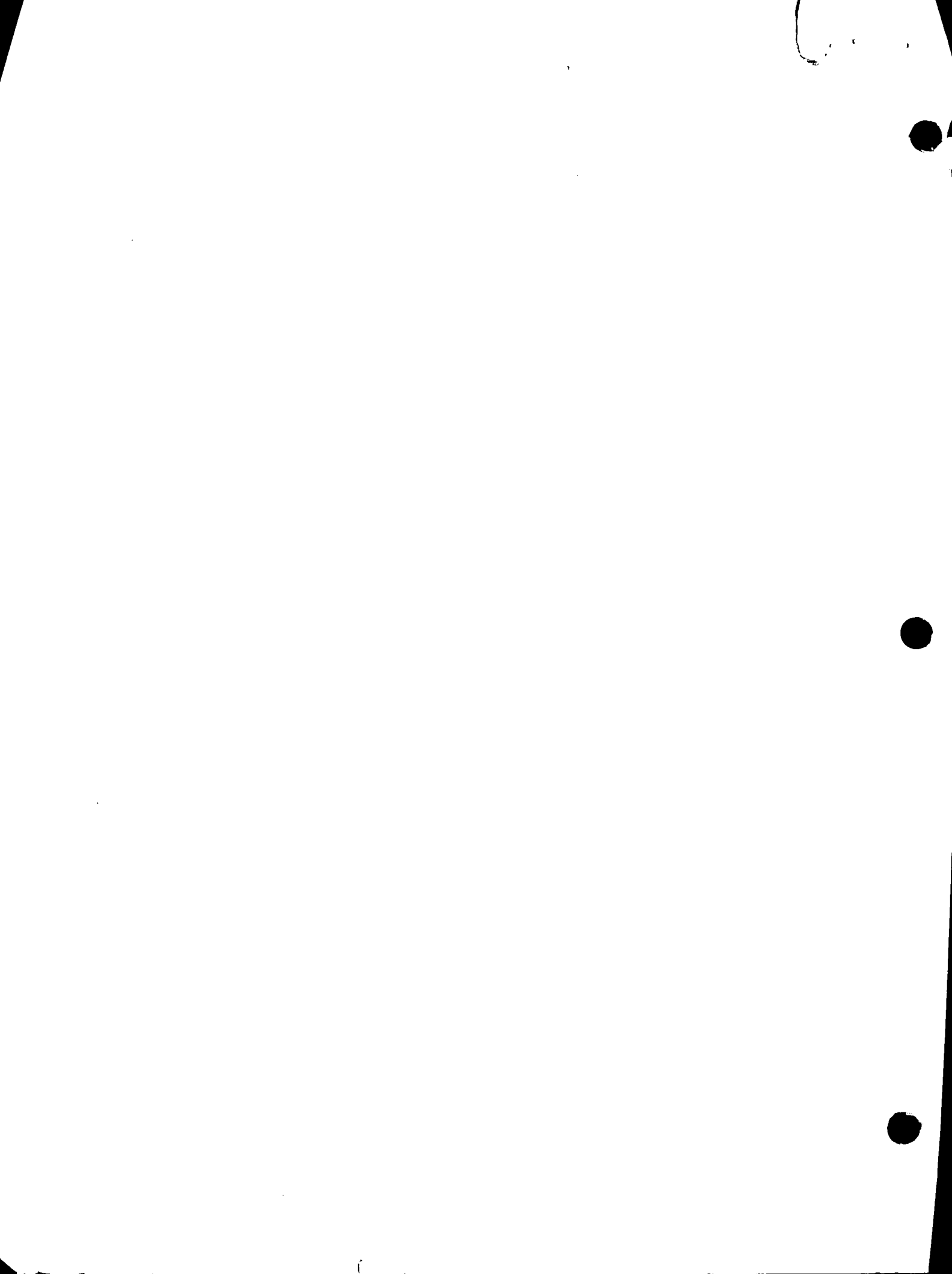
*Top line Presentation*

**FOREIGN AFFAIRS**

January, 1997/8

*The authoritative report on  
what Canadians are thinking, doing and buying*

16777412



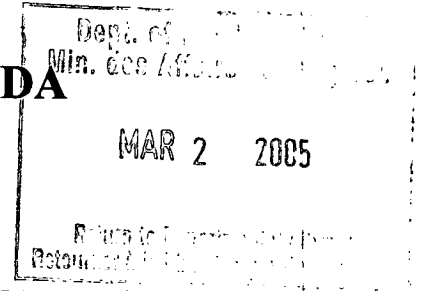
# ROPER REPORTS CANADA

FALL 1997

## CANADA'S LEVEL OF FOREIGN TRADE

### WITH SPECIFIC COUNTRIES

		Too Much %	About Right %	Not Enough %	Don't Know %
United Kingdom	1997	5	31	26	38
	1996	4	37	28	31
	1995	3	38	26	33
	1994	4	32	19	45
Germany	1997	4	30	24	41
	1996	4	35	28	34
	1995	5	36	25	33
	1994	6	31	18	44
Japan	1997	18	36	19	27
	1996	22	39	19	20
	1995	24	38	16	22
	1994	28	30	17	24
China	1997	20	30	22	27
	1996	22	34	22	21
	1995	21	35	19	25
	1994	22	23	21	34





# ROPER REPORTS CANADA

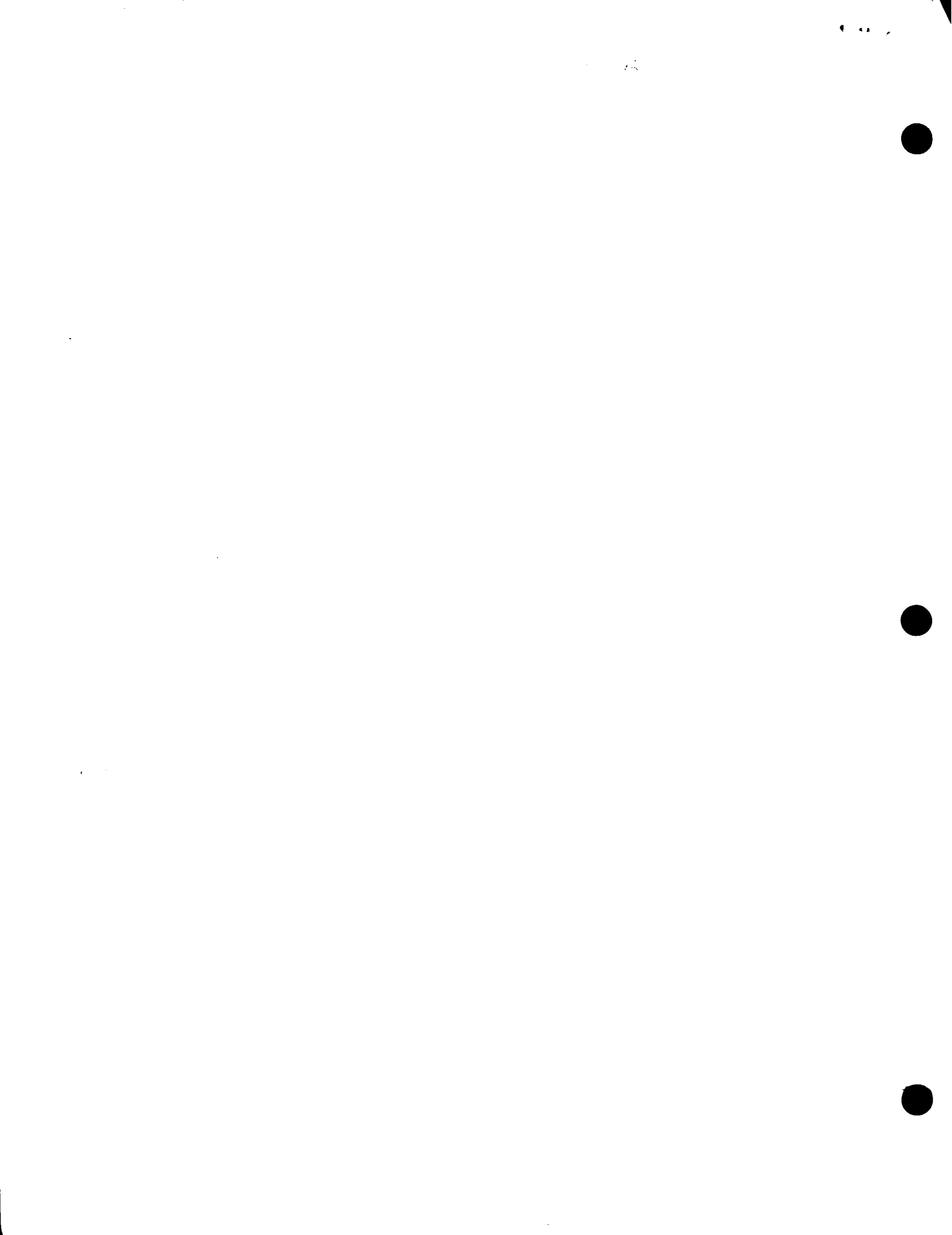
FALL 1997

## GLOBAL TRADE

### CANADA'S GLOBAL COMPETITIVENESS

*Q. In the area of global trade, I would like to know whether you think Canada can compete better, as well, or not as well as the following countries...*

		As Well	Better	Not As Well	Don't Know
United States	%	44	12	30	13
United Kingdom	%	41	19	10	30
Germany	%	39	15	16	30
Japan	%	36	12	31	22
China	%	33	20	27	20
Mexico	%	29	39	12	20
Brazil	%	27	34	9	30



# ROPER REPORTS CANADA

FALL 1997

## *CANADA'S LEVEL OF FOREIGN TRADE*

### *WITH SPECIFIC COUNTRIES*

		<b>Too Much %</b>	<b>About Right %</b>	<b>Not Enough %</b>	<b>Don't Know %</b>
<b>United States</b>	<b>1997</b>	<b>20</b>	<b>49</b>	<b>15</b>	<b>16</b>
	<b>1996</b>	<b>18</b>	<b>54</b>	<b>18</b>	<b>10</b>
	<b>1995</b>	<b>17</b>	<b>53</b>	<b>20</b>	<b>11</b>
	<b>1994</b>	<b>22</b>	<b>46</b>	<b>16</b>	<b>15</b>
<b>Mexico</b>	<b>1997</b>	<b>12</b>	<b>36</b>	<b>21</b>	<b>31</b>
	<b>1996</b>	<b>15</b>	<b>35</b>	<b>26</b>	<b>23</b>
	<b>1995</b>	<b>12</b>	<b>38</b>	<b>23</b>	<b>26</b>
	<b>1994</b>	<b>15</b>	<b>27</b>	<b>22</b>	<b>35</b>
<b>Brazil</b>	<b>1997</b>	<b>6</b>	<b>27</b>	<b>22</b>	<b>45</b>
	<b>1996</b>	<b>5</b>	<b>27</b>	<b>24</b>	<b>44</b>
	<b>1995</b>	<b>6</b>	<b>28</b>	<b>18</b>	<b>48</b>
	<b>1994</b>	<b>5</b>	<b>12</b>	<b>14</b>	<b>68</b>





***CANADA'S GLOBAL  
COMPETITIVENESS***



# **STARCH RESEARCH SERVICES LIMITED**

**\*Canadian owned full service marketing research firm**

**\*Operating in Canada since 1949**

**\*Exclusive Canadian member of International Research Associates (INRA)**

## **OPERATING DIVISIONS**

### **STARCH**

#### **Media & Advertising Research**

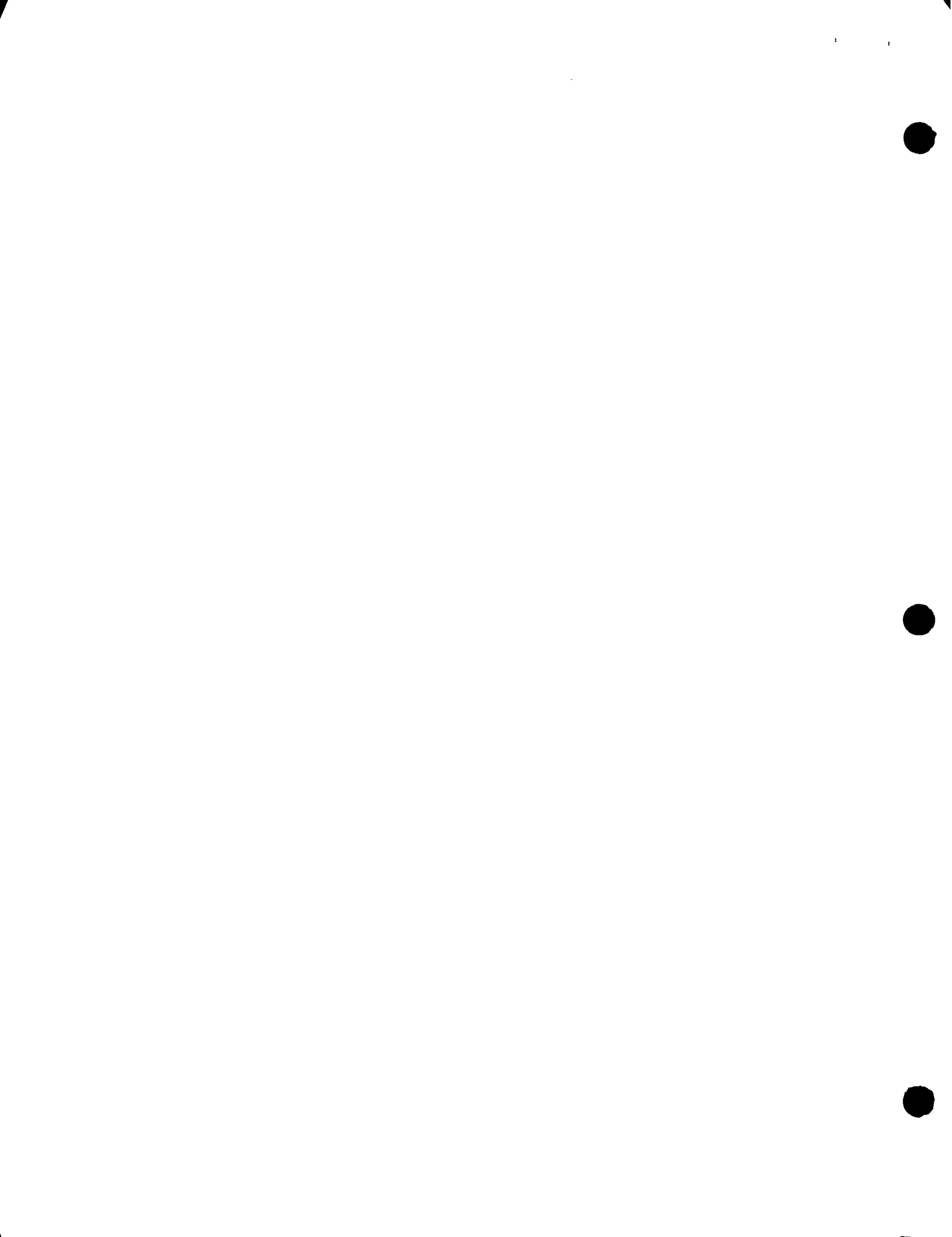
- \* Advertising & Communication Testing**
- \* Media Audience Studies**
- \* Syndicated Starch  
Advertisement Readership  
Surveys**

### **ROPER**

#### **Marketing and Public Opinion Research**

- \* Custom Designed Marketing Research**
- \* International Research**
- \* Syndicated Roper Reports Canada Poll**

**Both Starch and Roper were pioneers in their respective fields.**



# ROPER REPORTS CANADA

## *OVERVIEW*

- \* **Roper Canada is the marketing and public opinion research division of Starch Research Services Limited. Starch Research has been doing research in Canada for over 45 years.**
  
- \* **Roper Reports Canada is a national syndicated marketing and public opinion service providing marketing research expertise to a wide range of private and public sector clients.**
  
- \* **The service is patterned after the highly regarded Roper Reports service in the United States which is owned by Roper Starch Worldwide Inc.; North America's most comprehensive data base for tracking, analyzing and forecasting consumers' attitudes, behaviour and lifestyles.**
  
- \* **Roper Canada through its INRA affiliation is able to conduct and coordinate research in over 70 countries.**



# ROPER REPORTS CANADA

## *HOW CLIENTS USE ROPER REPORTS*

- \* **Strategic Planning** - obtain the big picture as to what Canadians are thinking, and doing.
  
- \* **Marketing Intelligence** - monitor consumer confidence and behaviour on a wide range of topics including personal finance and vacation travel.
  
- \* **Public Opinion** - gain in-depth insight into Canadians' attitudes on such current topics as job creation strategies, trade, health care, the environment and other public policy related issues.
  
- \* **Trending** - Track key trends and changes in Canadian consumers' behaviour and attitudes.
  
- \* **Advertising** - assess which media sources Canadians rely most on, find most credible.
  
- \* **Public Affairs** - identify which types of programs or marketing efforts Canadian consumers place the most trust in.





# **ROPER REPORTS CANADA**

## ***GENERAL TOPIC AREAS COVERED***

- \* Roper Reports covers a wide range of topics. This allows clients the opportunity to examine Canadians' attitudes, behaviour and opinions in a broader comprehensive context.**
  
- \* Topic areas covered include:**
  - Consumer Behaviour**
  - Consumer Confidence**
  - Economic Policy**
  - Environment**
  - Federal/Provincial Relations**
  - Foreign Trade**
  - Government Priorities**
  - Health Care**
  - Human Rights**
  - Job Creation Strategies**
  - Immigration**
  - Media Habits**
  - National Unity**
  - Technology/Computers**
  - Vacation Travel**
  
- \* The amount of attention given to specific areas is dependent on specific client needs.**



# **ROPER REPORTS CANADA**

## ***SURVEY METHODOLOGY***

- \* National syndicated survey conducted semi-annually among Canadian adults.**
  
- \* The Fall 1997 survey consisted of 1,209 personal in-home interviews.**
  
- \* Interviewing took place between November 4, and December 6, 1997.**
  
- \* Survey results are balanced to be reflective of the Canadian population and have margin of error  $\pm 2.8\%$  19 out of 20 times.**



# **ROPER REPORTS CANADA**

**FALL 1997**

## ***TODAY'S PRESENTATION***

- \* Mood of the Nation**
  
- \* Public Policy Issues**
  
- \* Foreign Trade and Public Policy Issues**
  
- \* Vancouver Summit**
  
- \* Support for APEC Free Trade Agreement**
  
- \* Level of Trade Between Specific Countries**
  
- \* Canada's Global Competitiveness**



***MOOD OF THE NATION***





# ROPER REPORTS CANADA

FALL 1997

## CONSUMER CONFIDENCE

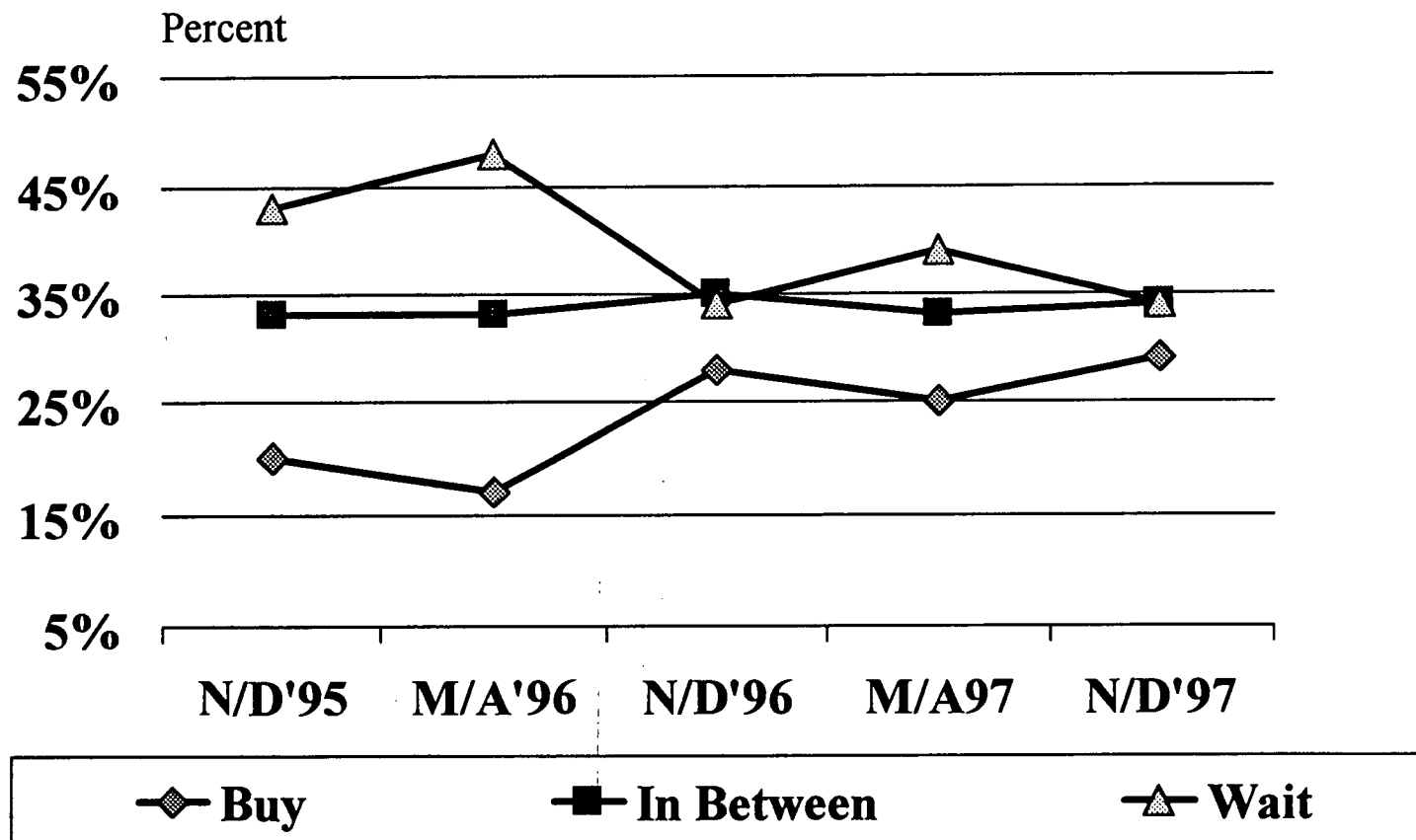
*Q. Considering both the availability and cost of things today, as well as your present financial circumstances, do you think now is a good time to buy things you want and need, or a good time to wait, or is it someplace in between?*

	%
Now is a good time to buy	29
Now is a good time to wait	34
Someplace in between	34
Don't know	3



# CONSUMER CONFIDENCE

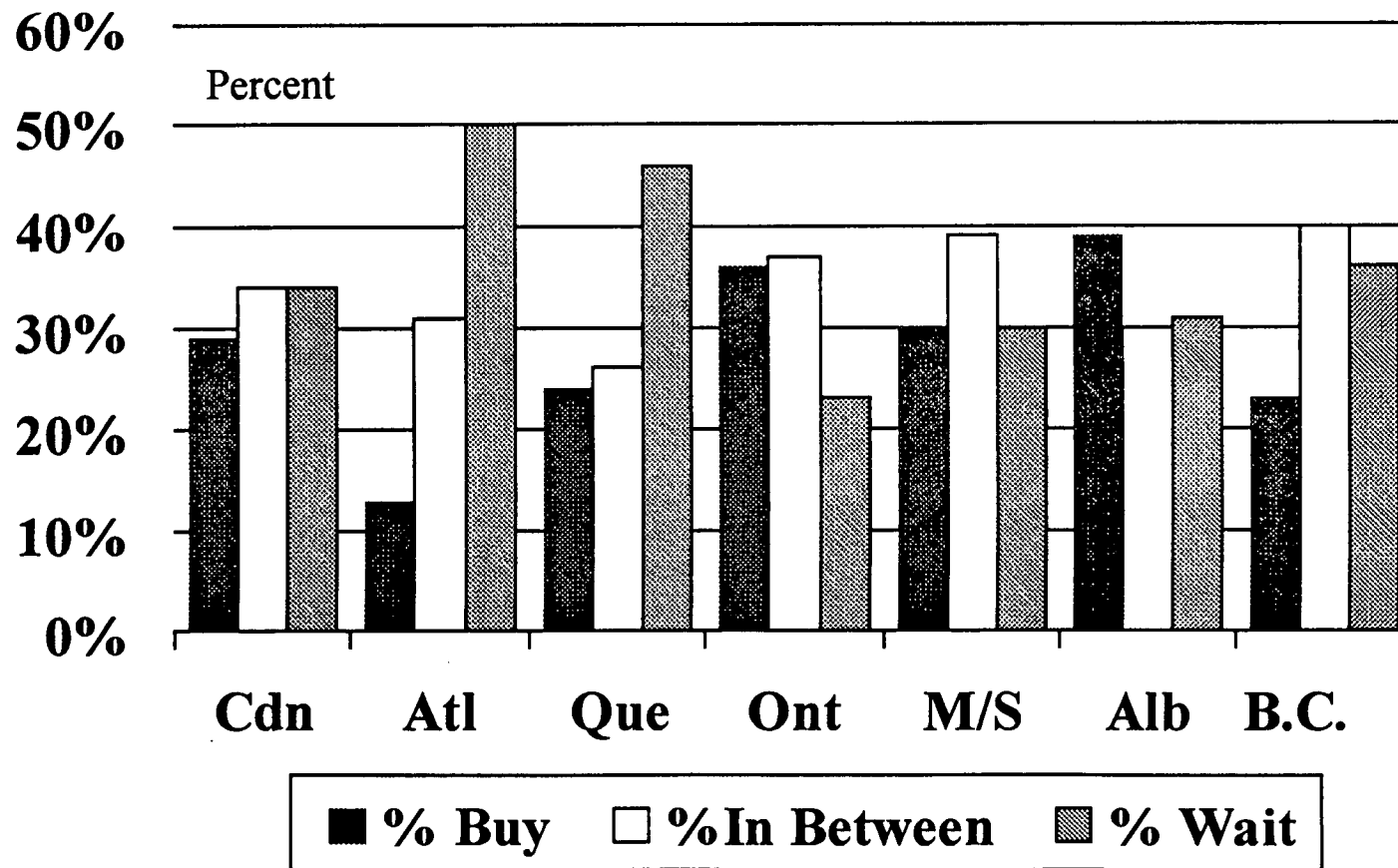
## GOOD TIME TO BUY VS GOOD TIME TO WAIT



Source: Roper Canada - Nov/Dec '97



# CONSUMER CONFIDENCE BY REGION



Source: Roper Canada - Nov/Dec '97



**ROPER REPORTS CANADA**

**FALL 1997**

***1998 PERSONAL FINANCIAL OUTLOOK***

***COMPARED TO 1997***

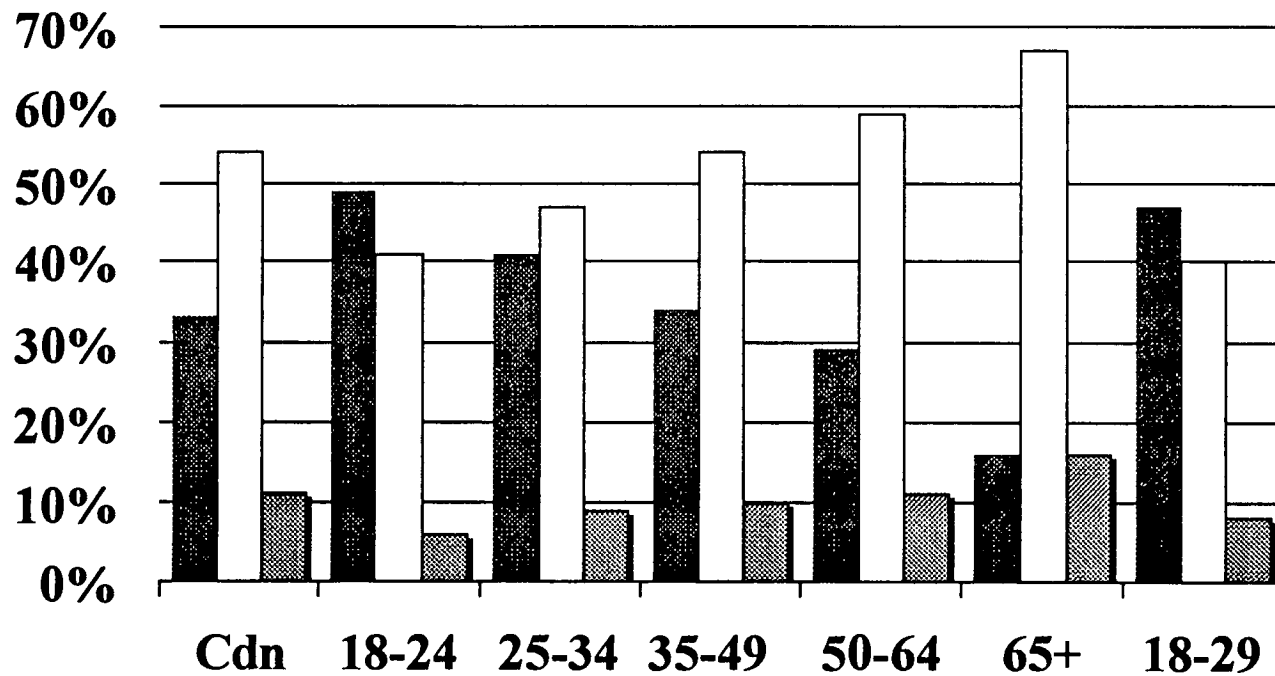
***Q. Is that more because of your personal finances at this time, or more because of the state of the economy?***

	<b>%</b>
<b>Better</b>	<b>33</b>
<b>About the same</b>	<b>54</b>
<b>Not as good</b>	<b>11</b>
<b>Don't know</b>	<b>2</b>





## 1998 PERSONAL FINANCIAL OUTLOOK BY AGE



%Better
  %About the same
  %Not as good

Source: Roper Canada - Nov/Dec '97



# ROPER REPORTS CANADA

FALL 1997

## *DIRECTION OF THE COUNTRY*

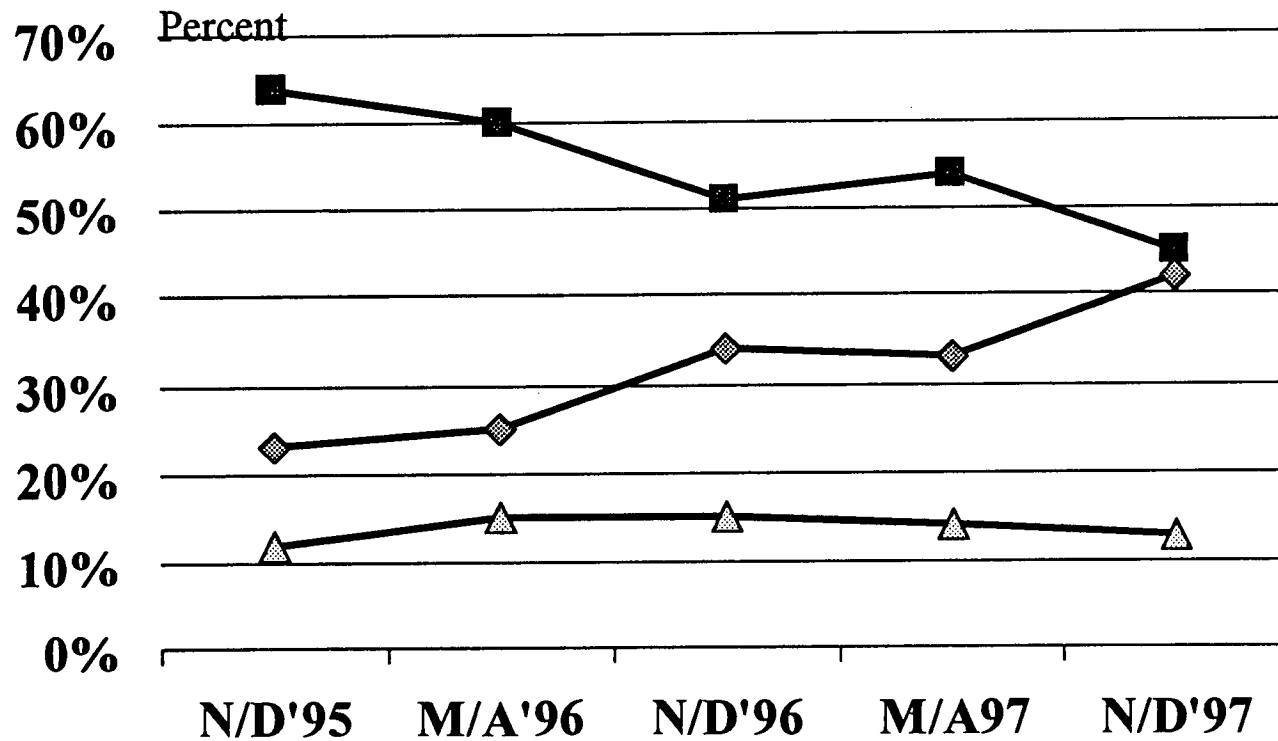
*Q. Do you feel things in this country are generally going in the right direction today, or do you feel that things have pretty seriously gotten off on the wrong track?*

	%
Right direction	42
Wrong track	45
Don't know	13



# DIRECTION OF COUNTRY

## RIGHT DIRECTION VS WRONG TRACK



◆ Right Direction    ■ Wrong Track    ▲ Don't Know

Source: Roper Canada - Nov/Dec '97



**ROPER REPORTS CANADA**

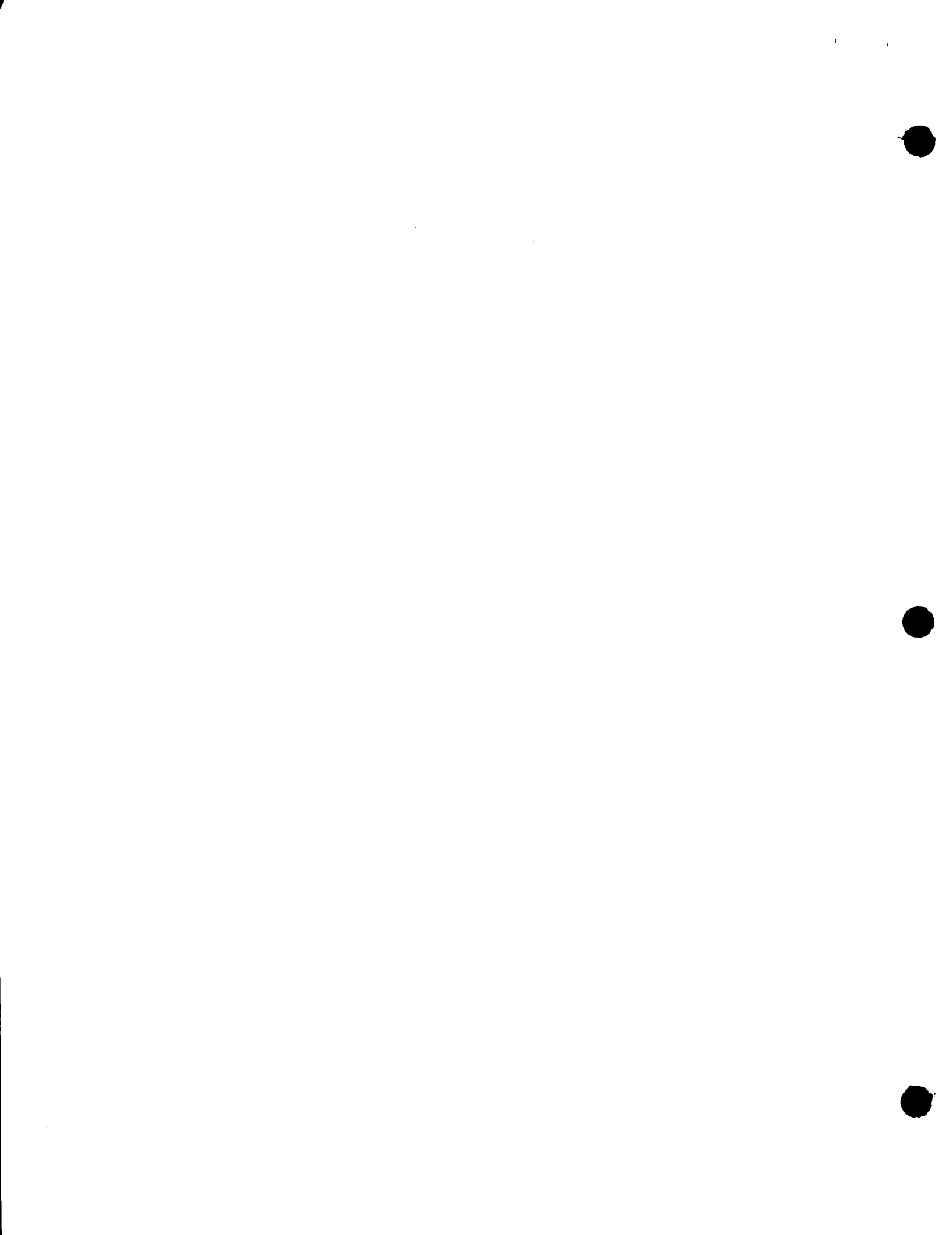
**FALL 1997**

***COUNTRY STAYING UNITED***

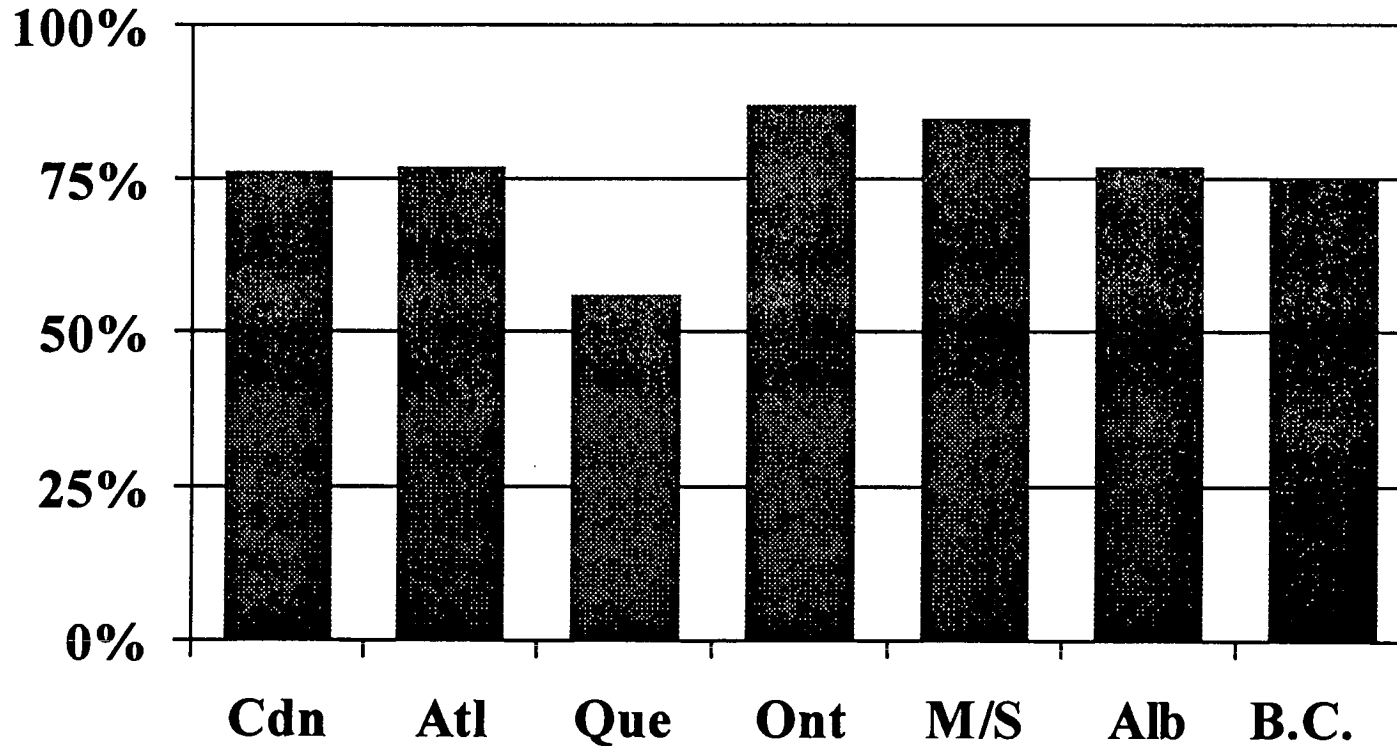
***Q. How optimistic are you about Canada staying together as one country? Are you very optimistic, somewhat optimistic, not very optimistic or not at all optimistic?***

	<b>%</b>
<b>Very Optimistic</b>	<b>32</b>
<b>Somewhat Optimistic</b>	<b>44</b>
<b>Not Very Optimistic</b>	<b>14</b>
<b>Not At All Optimistic</b>	<b>5</b>
<b>Don't know</b>	<b>5</b>
<b>Very/Somewhat Optimistic</b>	<b>76</b>





# COUNTRY STAYING UNITED % VERY/SOMEWHAT OPTIMISTIC



Source: Roper Canada - Nov/Dec '97



***PUBLIC POLICY ISSUES***



**ROPER REPORTS CANADA**

**FALL 1997**

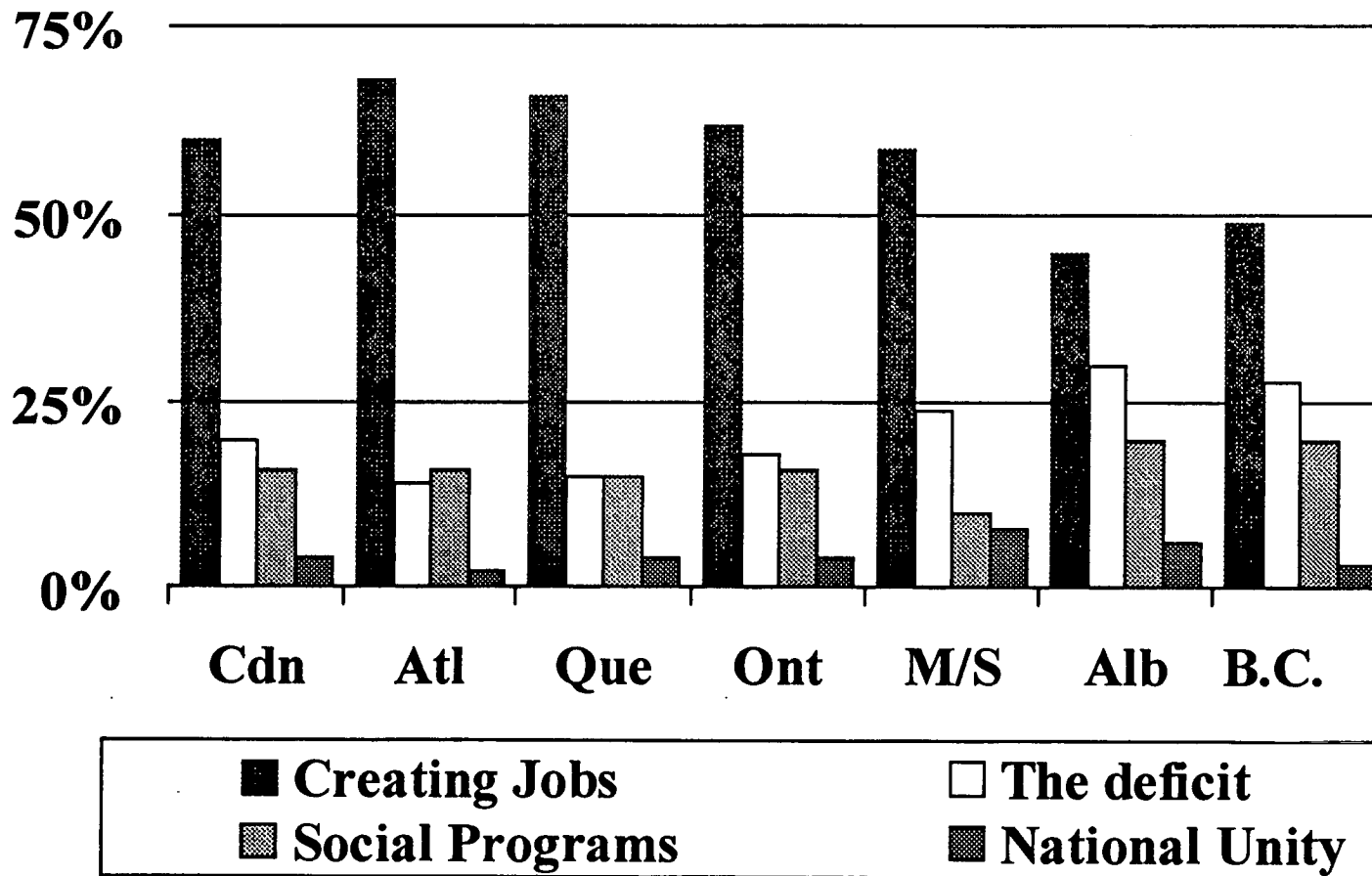
***ISSUE WHICH THE  
FEDERAL GOVERNMENT  
SHOULD FOCUS MOST ON***

***Q. From this list, which one of the four issues do you think the Federal government should focus its attention the most on?***

	<b>%</b>
<b>Creating jobs</b>	<b>60</b>
<b>Reducing the deficit</b>	<b>20</b>
<b>Maintaining social programs</b>	<b>16</b>
<b>Promoting national unity</b>	<b>4</b>



# ISSUE FEDERAL GOVERNMENT SHOULD FOCUS ON MOST BY REGION



Source: Roper Canada - Nov/Dec '97





# ROPER REPORTS CANADA

FALL 1997

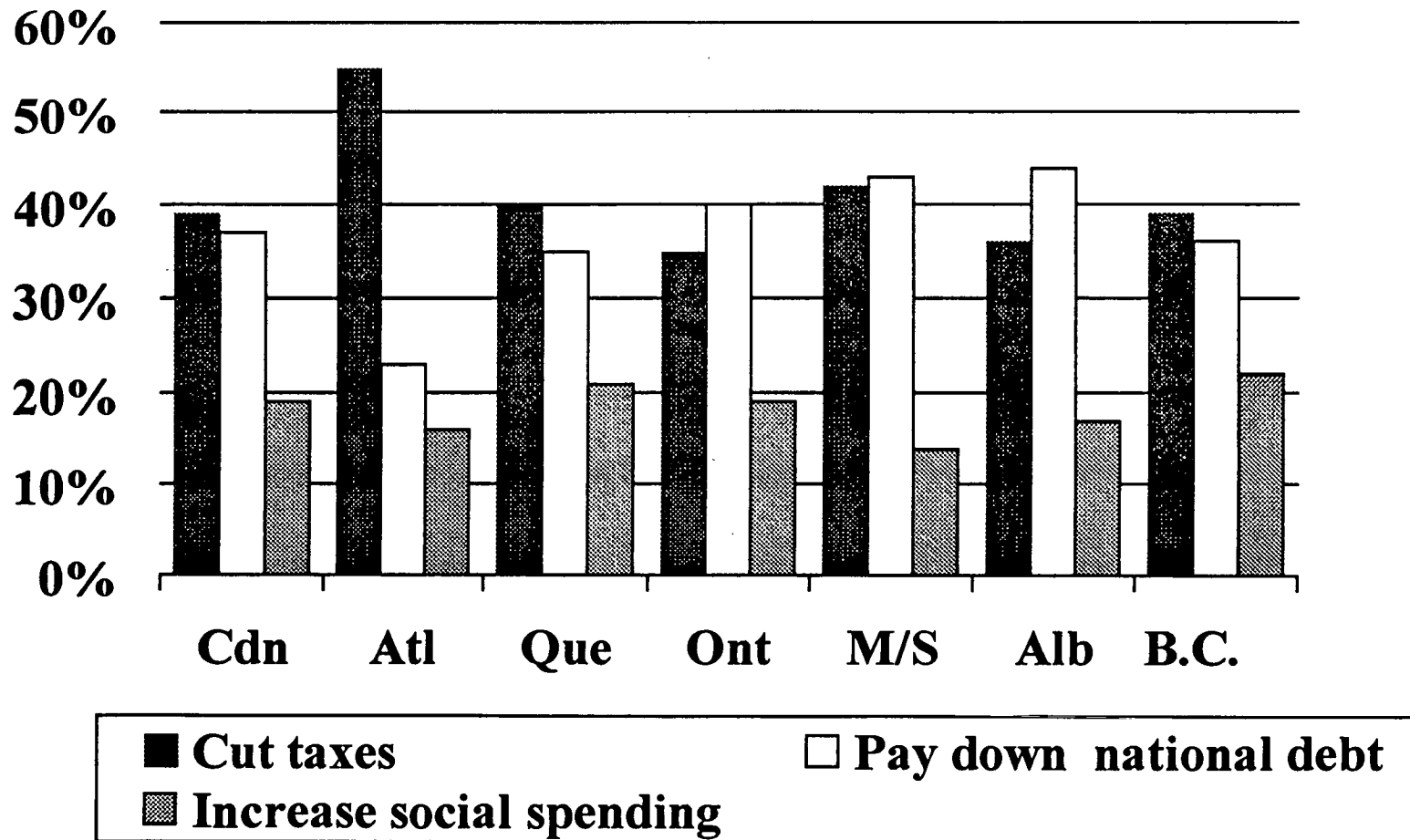
## *FISCAL DIVIDEND*

*Q. The federal government is forecasting that there will be a budget surplus in 1999. Listed on this card are three options the federal government is considering. Which option do you think the federal government should choose?*

	%
Cut taxes	39
Pay down the national debt	37
Increase social spending	19
Don't know	5



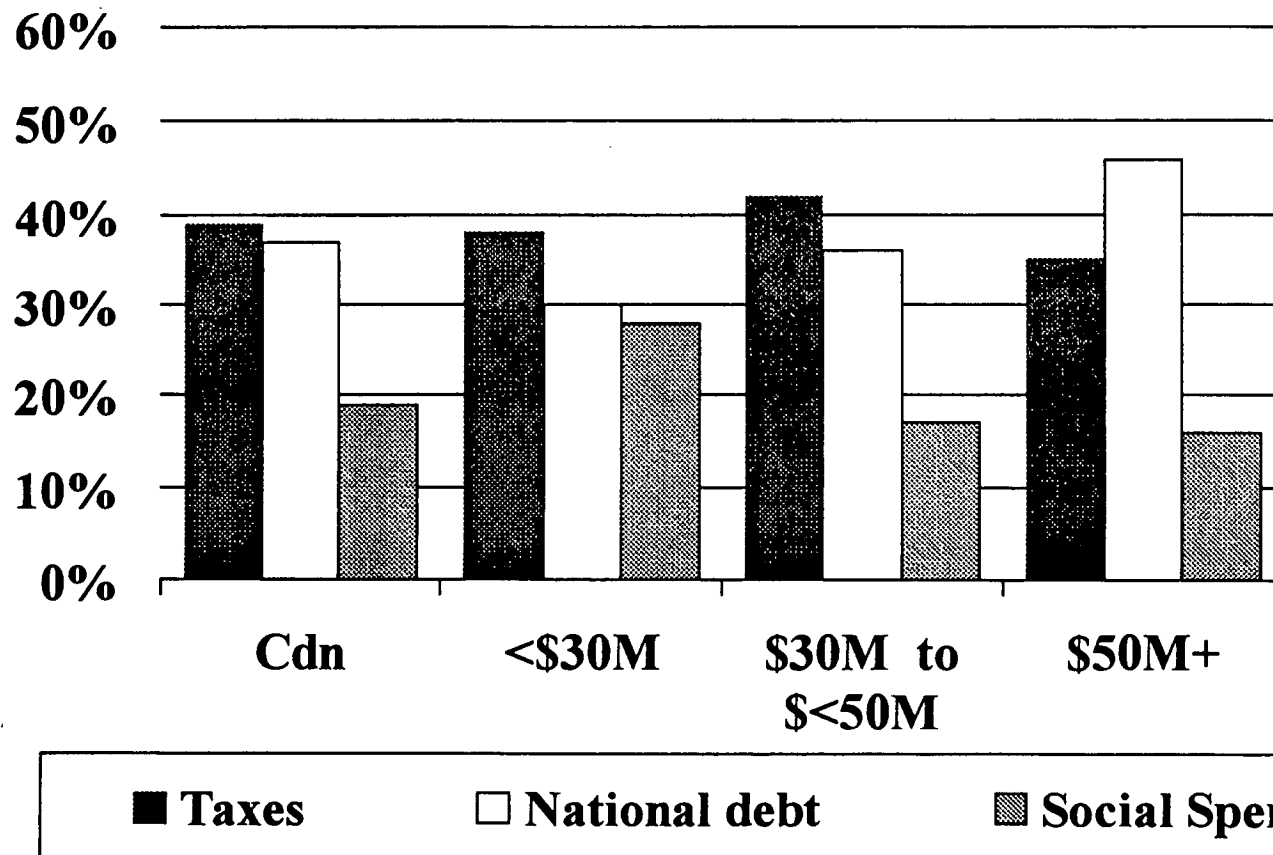
# FISCAL DIVIDEND OPTION PREFERENCE BY REGION



Source: Roper Canada - Nov/Dec '97



# FISCAL DIVIDEND OPTION PREFERENCE BY HOUSEHOLD INCOME



Source: Roper Canada - Nov/Dec '97



***PERFORMANCE RATING OF  
THIRTEEN FEDERAL GOVERNMENT  
ACTIVITIES***





# **ROPER REPORTS CANADA**

**FALL 1997**

## ***PERFORMANCE RATING OF VARIOUS FEDERAL GOVERNMENT ACTIVITIES***

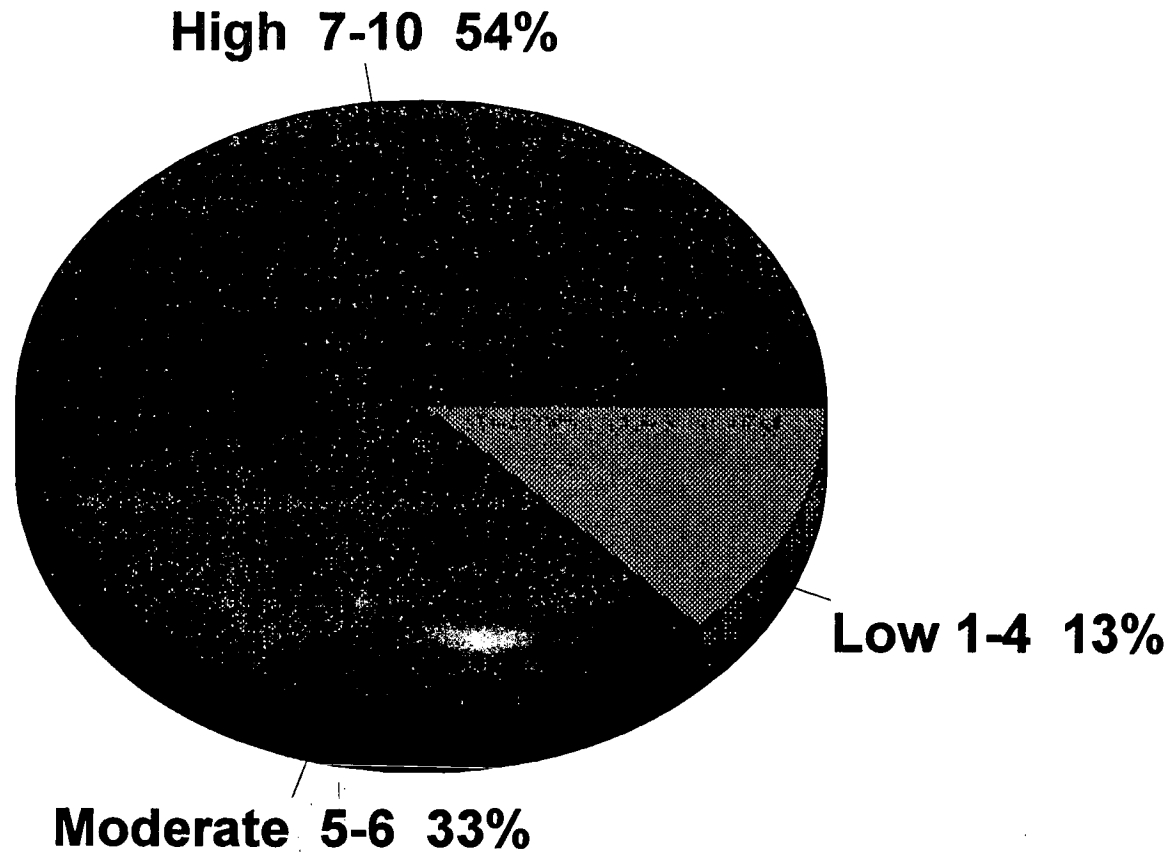
### ***MODERATE TO HIGH RATING***

	<b>Moderate (5-6) %</b>	<b>High (7-10) %</b>	<b>Combined Rating %</b>
<b>Promoting trade</b>	<b>33</b>	<b>54</b>	<b>87</b>
<b>Improving level of science and technology</b>	<b>43</b>	<b>37</b>	<b>80</b>
<b>Keeping the country united</b>	<b>32</b>	<b>43</b>	<b>75</b>
<b>Reducing the deficit</b>	<b>30</b>	<b>41</b>	<b>71</b>
<b>Reducing interest rates</b>	<b>31</b>	<b>40</b>	<b>71</b>
<b>Promoting Canadian culture</b>	<b>43</b>	<b>28</b>	<b>71</b>

**Rating based on ten point scale: 1 = Performed Very Poorly  
and 10 = Performed Very Well.**



# PERFORMANCE RATING PROMOTING TRADE

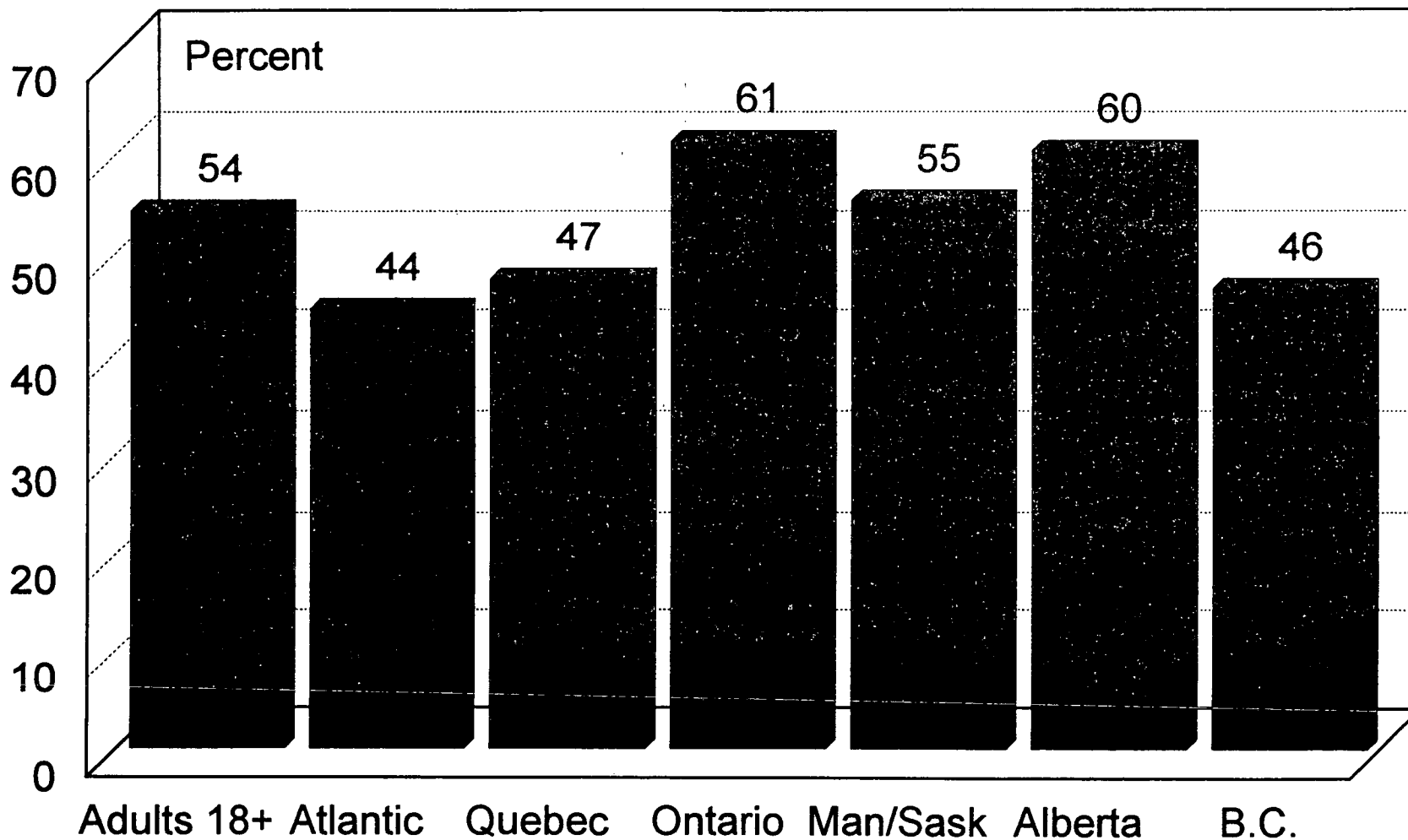


**ADULTS 18+**



# PROMOTING TRADE WITH OTHER COUNTRIES

## % PERFORMANCE RATING 7 TO 10

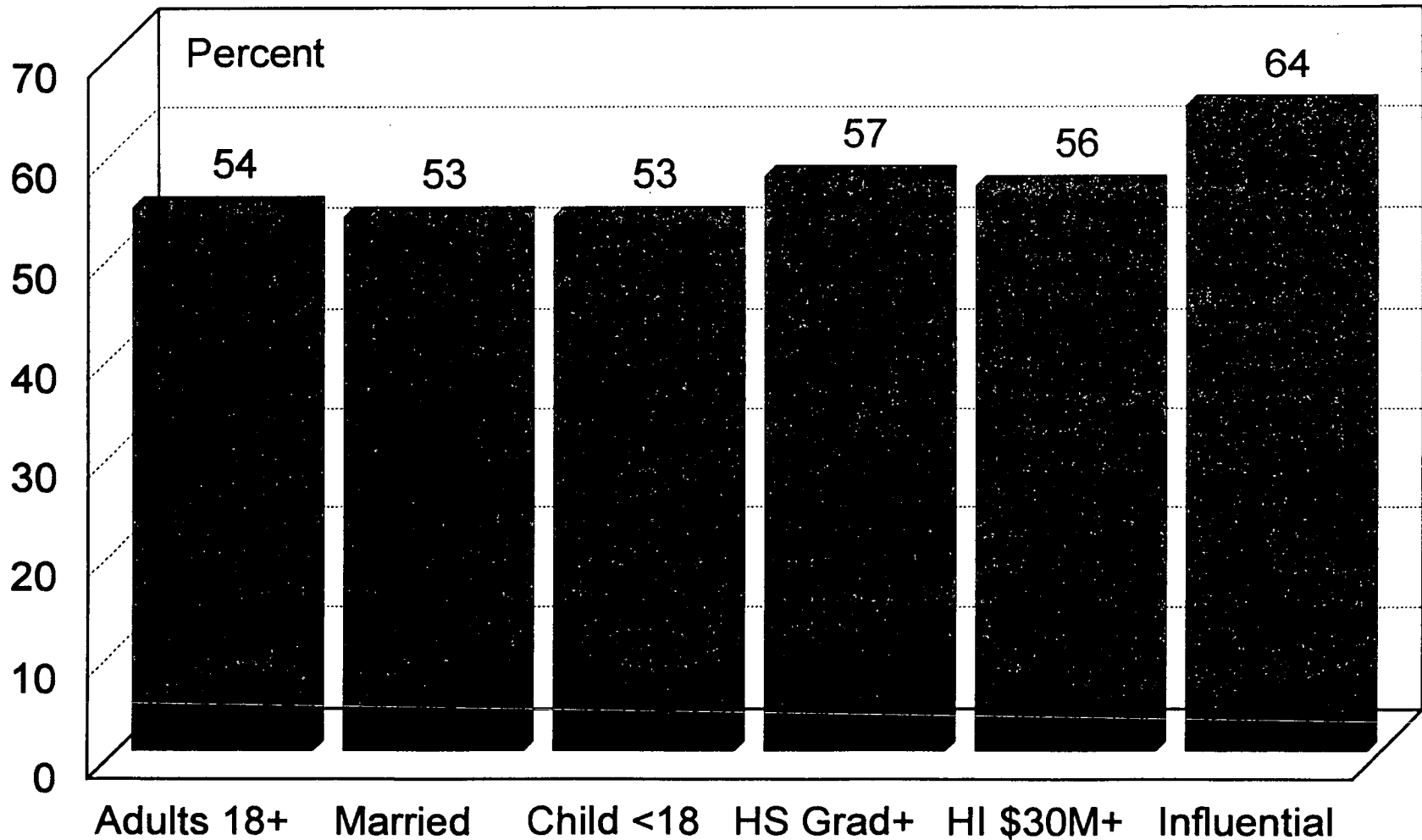


Roper Canada: Nov/Dec '97



# PROMOTING TRADE WITH OTHER COUNTRIES

## % PERFORMANCE RATING 7 TO 10



Roper Canada: Nov/Dec '97





# ROPER REPORTS CANADA

FALL 1997

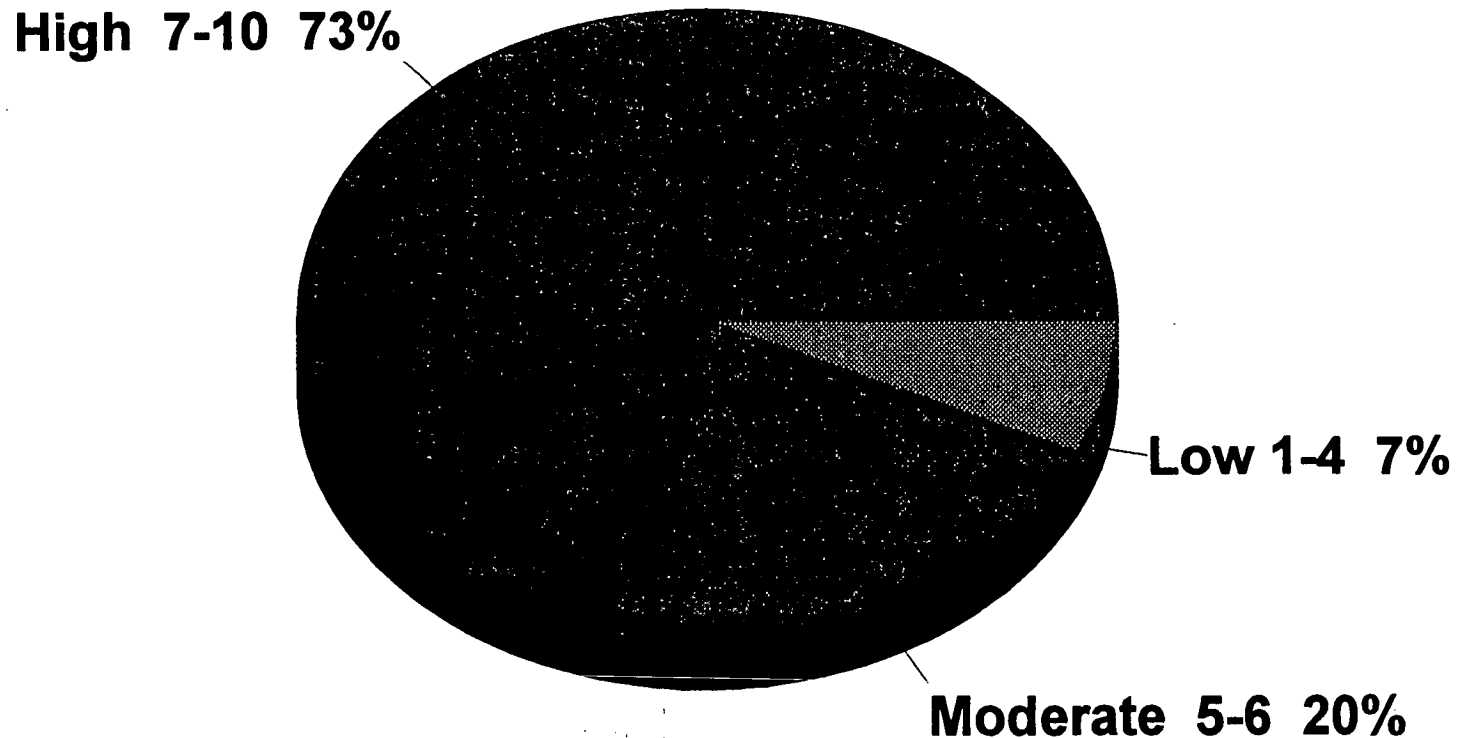
## *PRIORITY RATING FEDERAL GOVERNMENT*

### *SHOULD GIVE SPECIFIC ACTIVITIES*

	Rating 7-10 %
Maintaining the health care system	90
Creating jobs	87
Providing pensions and other social security programs	84
Holding down taxes	83
Reducing the deficit	82
Fighting inflation	81
Improving job skills of Canadians	78
Helping small businesses	75
Reducing interest rates	75
Promoting trade	73
Keeping the country united	72
Improving level of science and technology	70
Promoting Canadian culture	47



# PRIORITY RATING PROMOTING TRADE

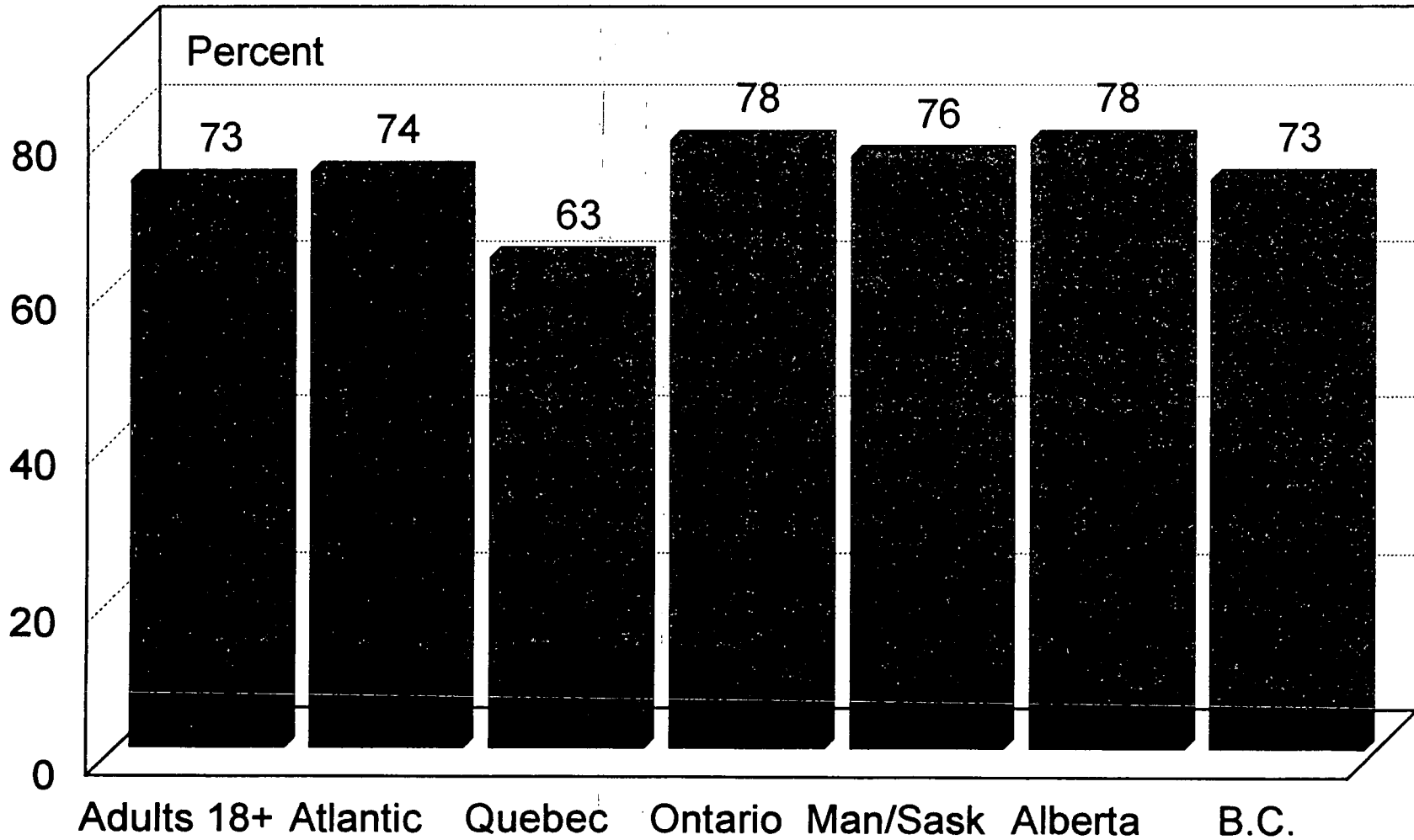


**ADULTS 18+**

Roper Canada: Nov/Dec '97



# PROMOTING TRADE WITH OTHER COUNTRIES % ASSESSING HIGH PRIORITY RATING RATING 7 TO 10



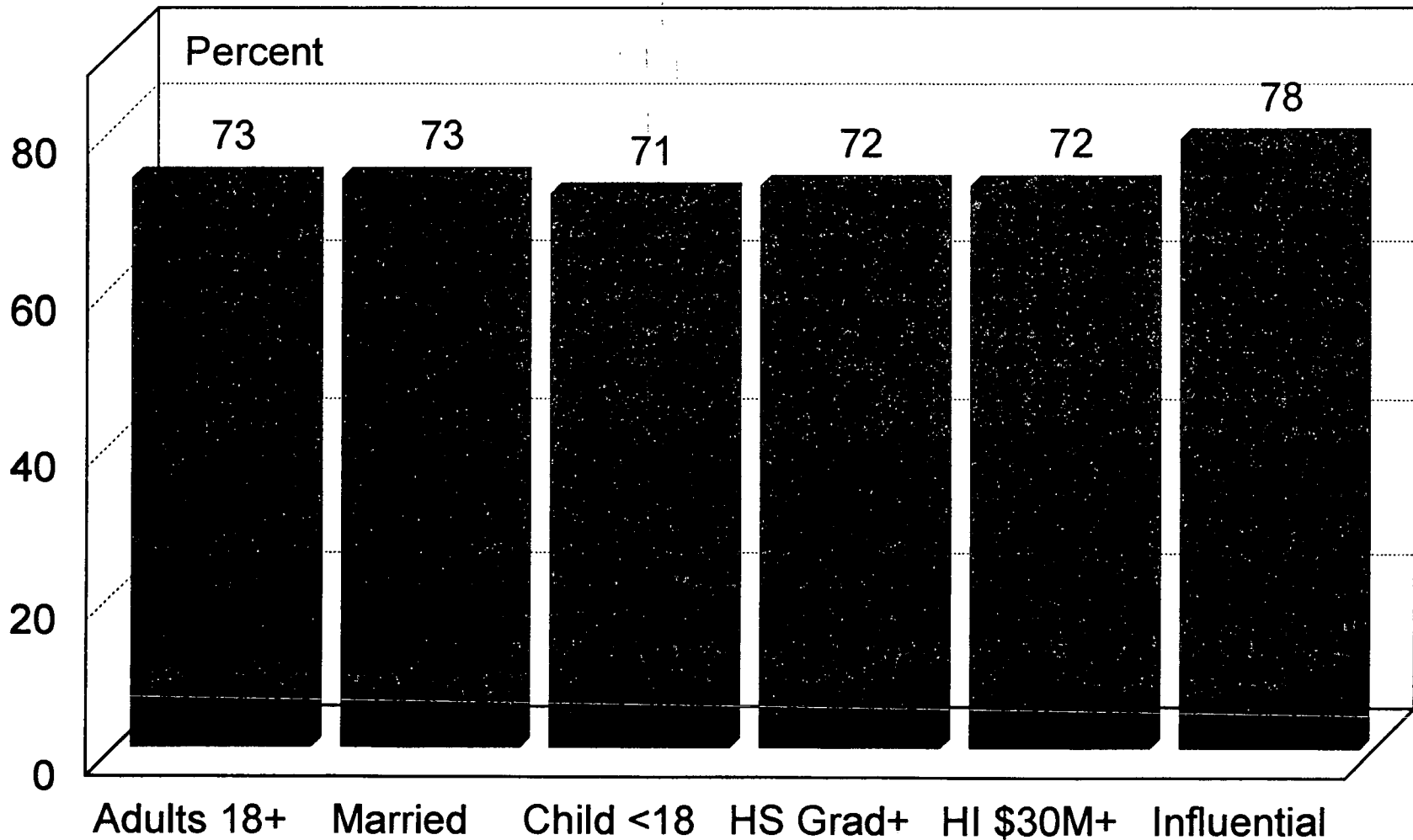
Roper Canada: Nov/Dec '97



# PROMOTING TRADE WITH OTHER COUNTRIES

## % ASSESSING HIGH PRIORITY RATING

### RATING 7 TO 10



Roper Canada: Nov/Dec '97

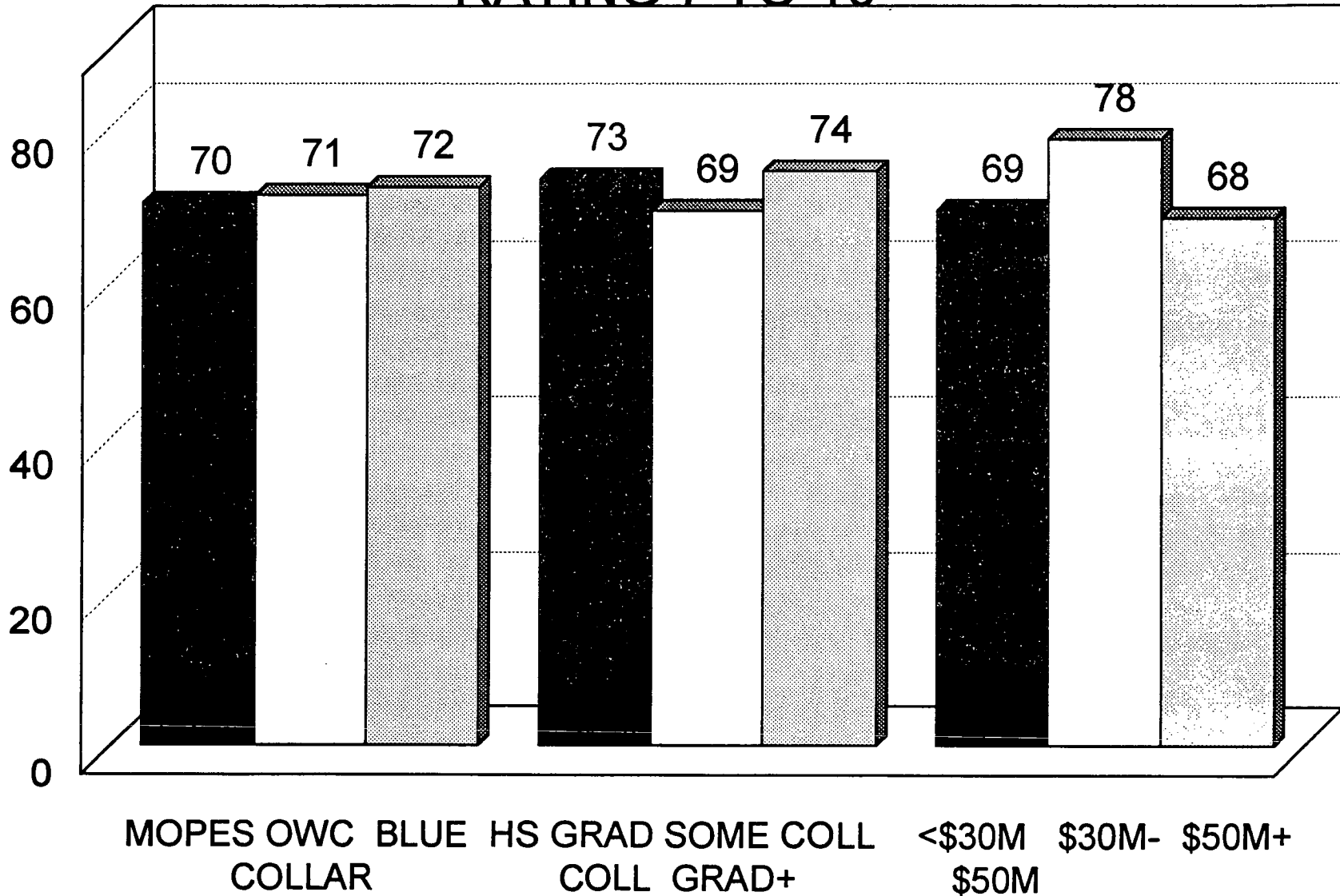




# PROMOTING TRADE WITH OTHER COUNTRIES

## % ASSESSING HIGH PRIORITY RATING

### RATING 7 TO 10



Roper Canada: Nov/Dec '97



***FEDERAL/PROVINCIAL RELATIONS***

***AREAS OF JURISDICTION***



# ROPER REPORTS CANADA

FALL 1997

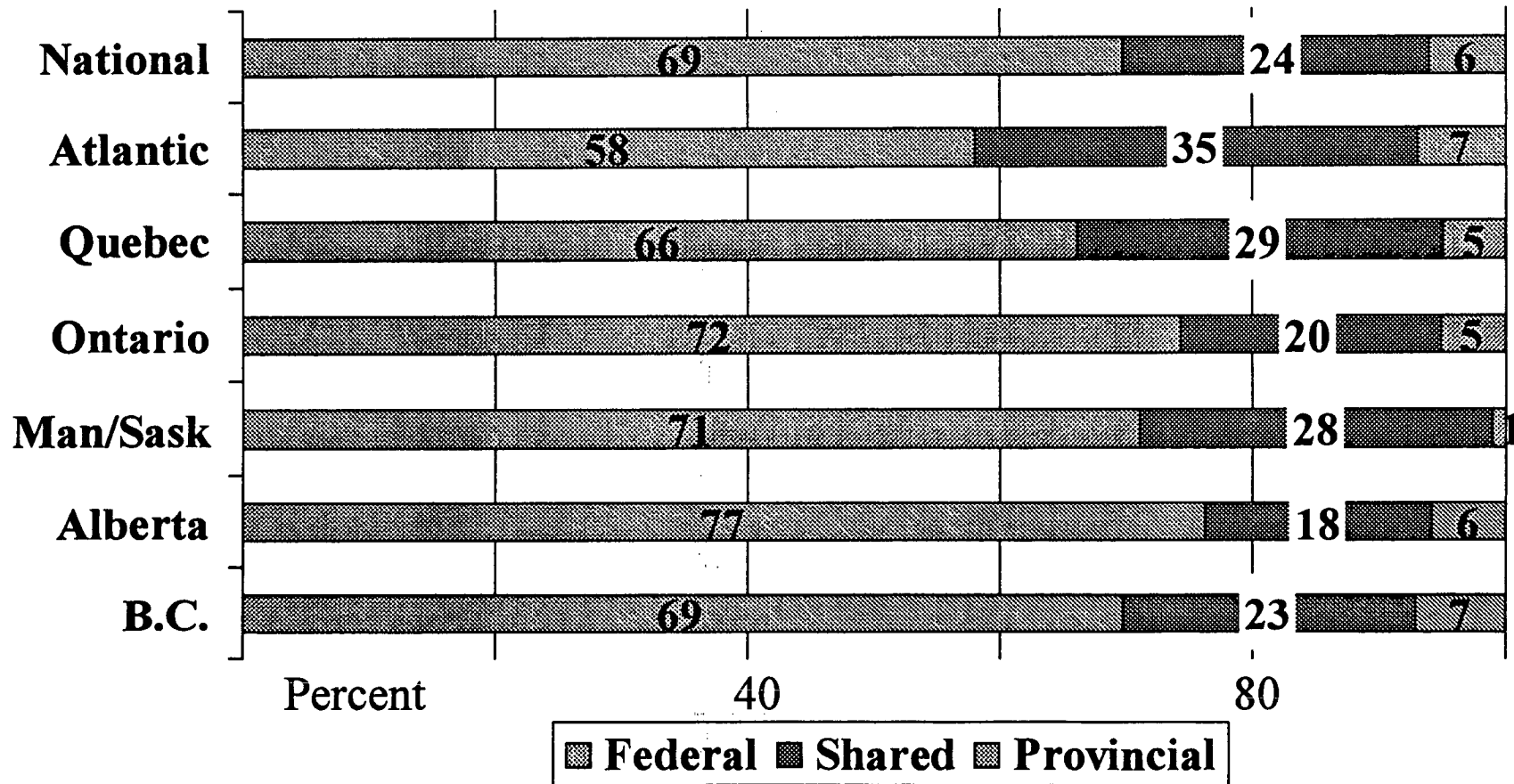
## FEDERAL/PROVINCIAL RELATIONS AREAS OF JURISDICTION

*Q. For each of the following, would you prefer that the federal government have most or all of the jurisdiction or that provincial government have most or all of the jurisdiction?*

		MOST OR ALL		
		Federal Gov't.	Provincial Gov't.	Shared Equally
Defence	%	69	6	24
Foreign Affairs	%	67	7	27
Immigration	%	55	12	13
Promoting trade with other countries	%	51	9	40
Aboriginal issues	%	47	13	40
Improving the level of Science & Technology	%	41	11	48
Fisheries	%	40	23	37
Providing pensions & other social programs	%	37	13	50



# *FEDERAL/PROVINCIAL JURISDICTION - DEFENCE*

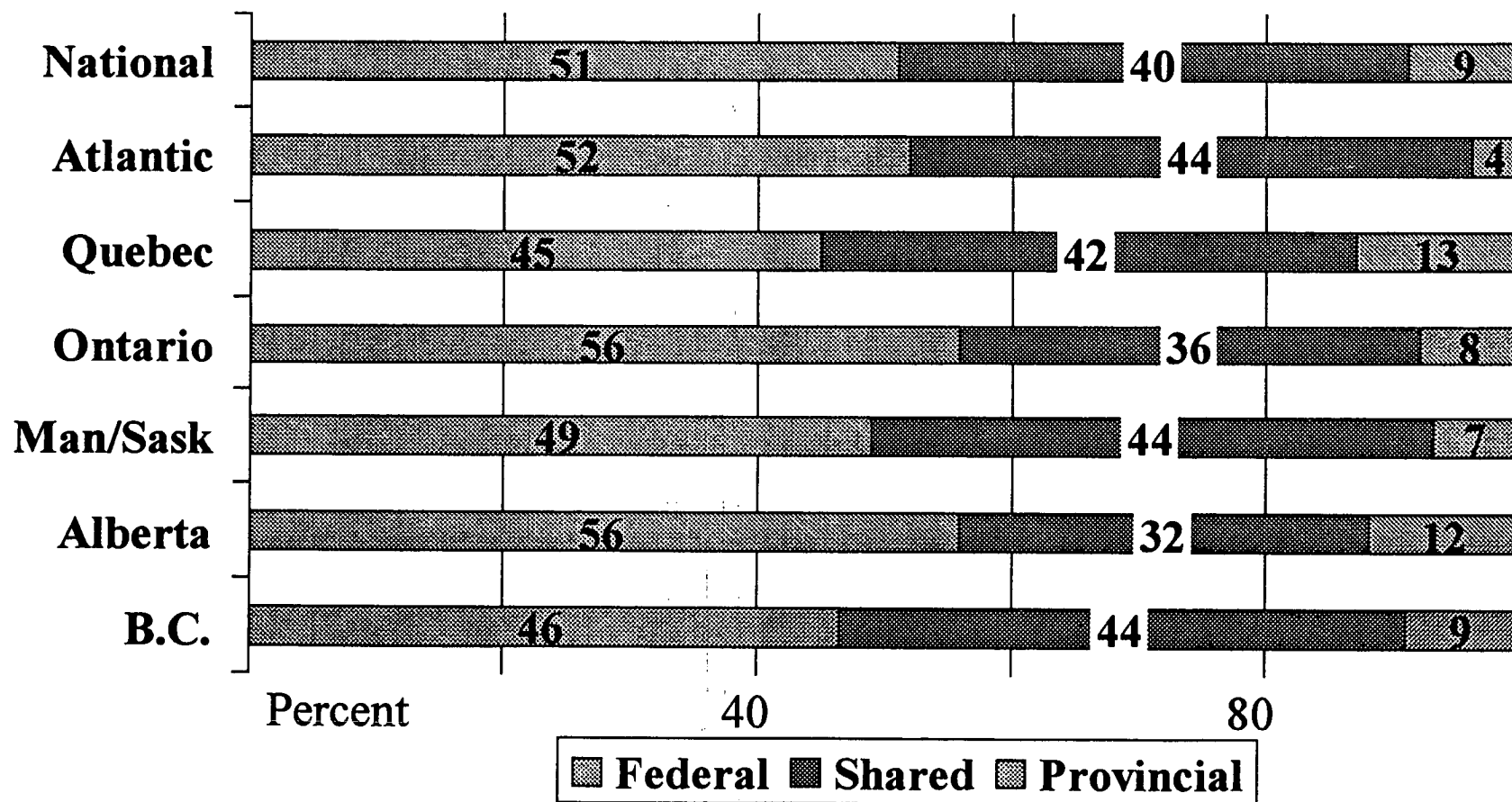


Source: Roper Canada - Nov/Dec '97





# *FEDERAL/PROVINCIAL JURISDICTION - INTERNATIONAL TRADE*



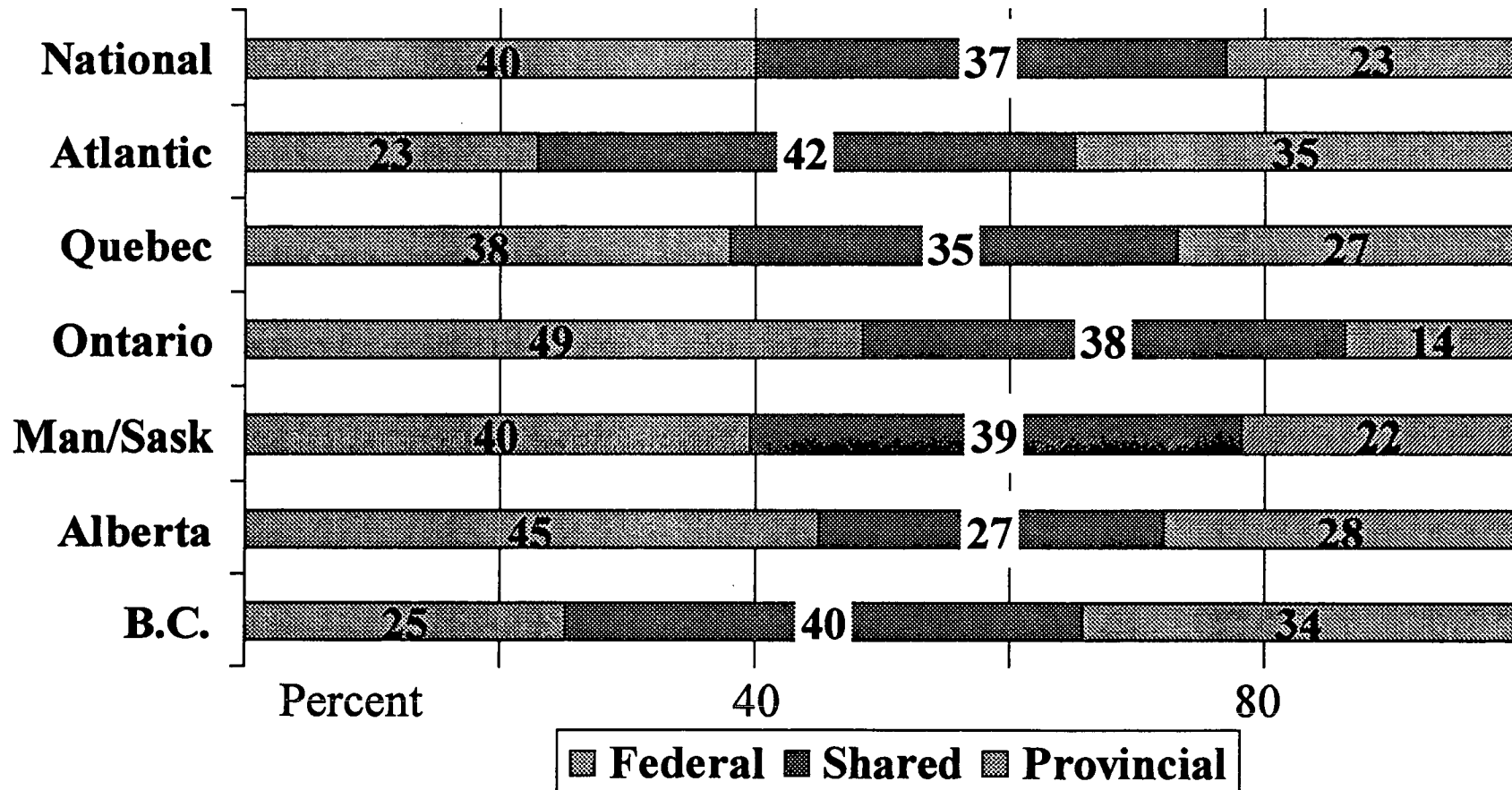
Source: Roper Canada - Nov/Dec '97



12



# *FEDERAL/PROVINCIAL JURISDICTION - FISHERIES*



Source: Roper Canada - Nov/Dec '97



***VANCOUVER SUMMIT***



**ROPER REPORTS CANADA**

**FALL 1997**

***AWARENESS THAT 1997***

***CANADA'S YEAR OF ASIA-PACIFIC***

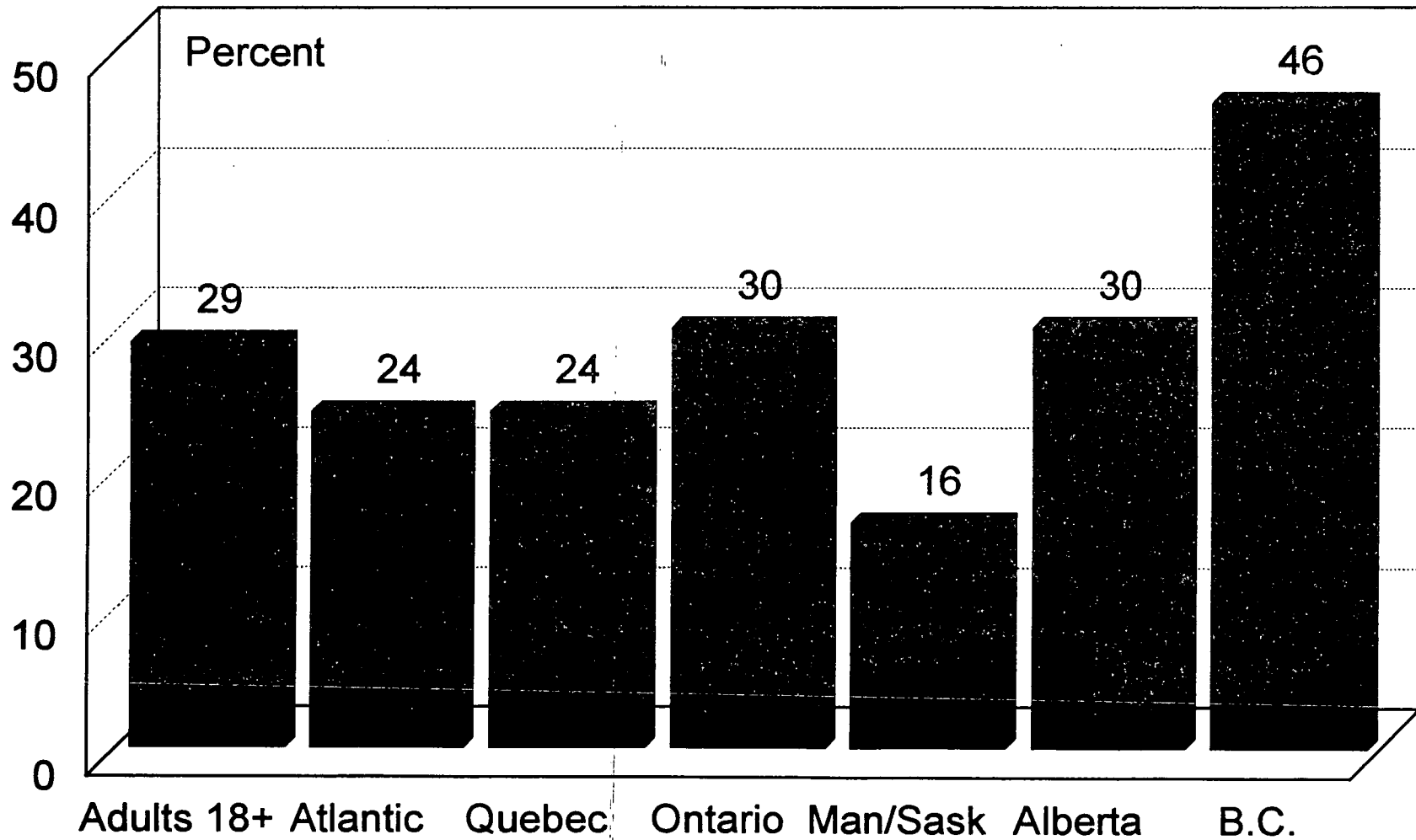
***Q. Have you heard, read or seen anything about 1997 being  
Canada's year of Asia-Pacific?***

	<b>%</b>
<b>Yes</b>	<b>29</b>
<b>No</b>	<b>71</b>





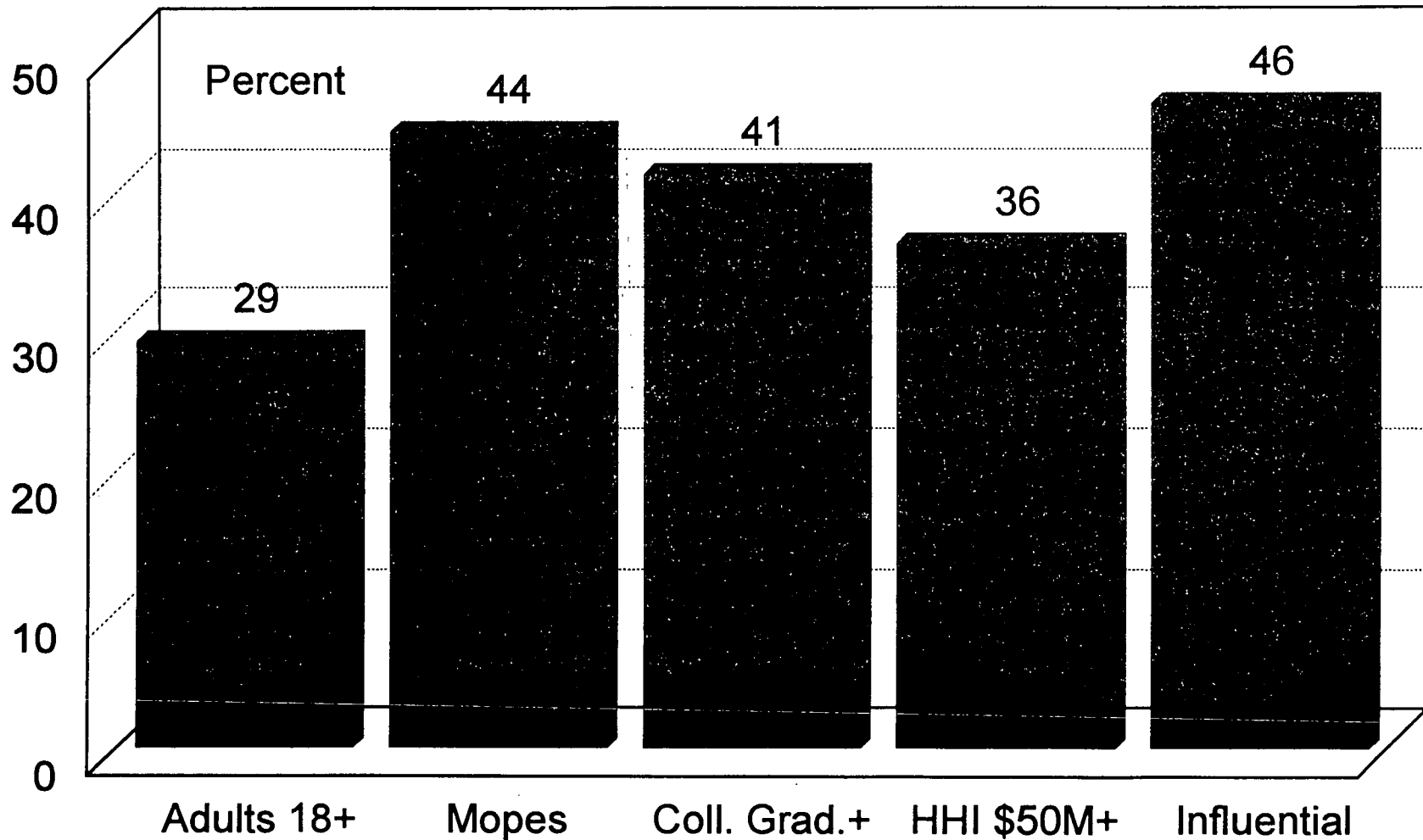
# PERCENT AWARE THAT 1997 IS CANADA'S YEAR OF ASIA PACIFIC



Roper Canada: Nov/Dec '97



# PERCENT AWARE THAT 1997 IS CANADA'S YEAR OF ASIA PACIFIC



Roper Canada: Nov/Dec '97



**ROPER REPORTS CANADA**

**FALL 1997**

***SPECIFIC RECALL FOR CANADA'S***

***YEAR OF ASIA-PACIFIC***

***(Among those aware)***

***Q. What did you hear, read or see?***

	<b>%</b>
<b>Meeting of Asia-Pacific leaders in Vancouver</b>	<b>54</b>
<b>Ad on television</b>	<b>36</b>
<b>Other Apec events</b>	<b>22</b>
<b>Special newspaper</b>	<b>17</b>
<b>Business meeting/event in my area</b>	<b>4</b>
<b>Poster</b>	<b>4</b>
<b>Cultural event in my area</b>	<b>4</b>
<b>Flyer in mail</b>	<b>2</b>
<b>Other</b>	<b>20</b>
<b>Don't recall</b>	<b>5</b>



**ROPER REPORTS CANADA**

**FALL 1997**

***AWARENESS OF APEC MEETING***

***IN VANCOUVER***

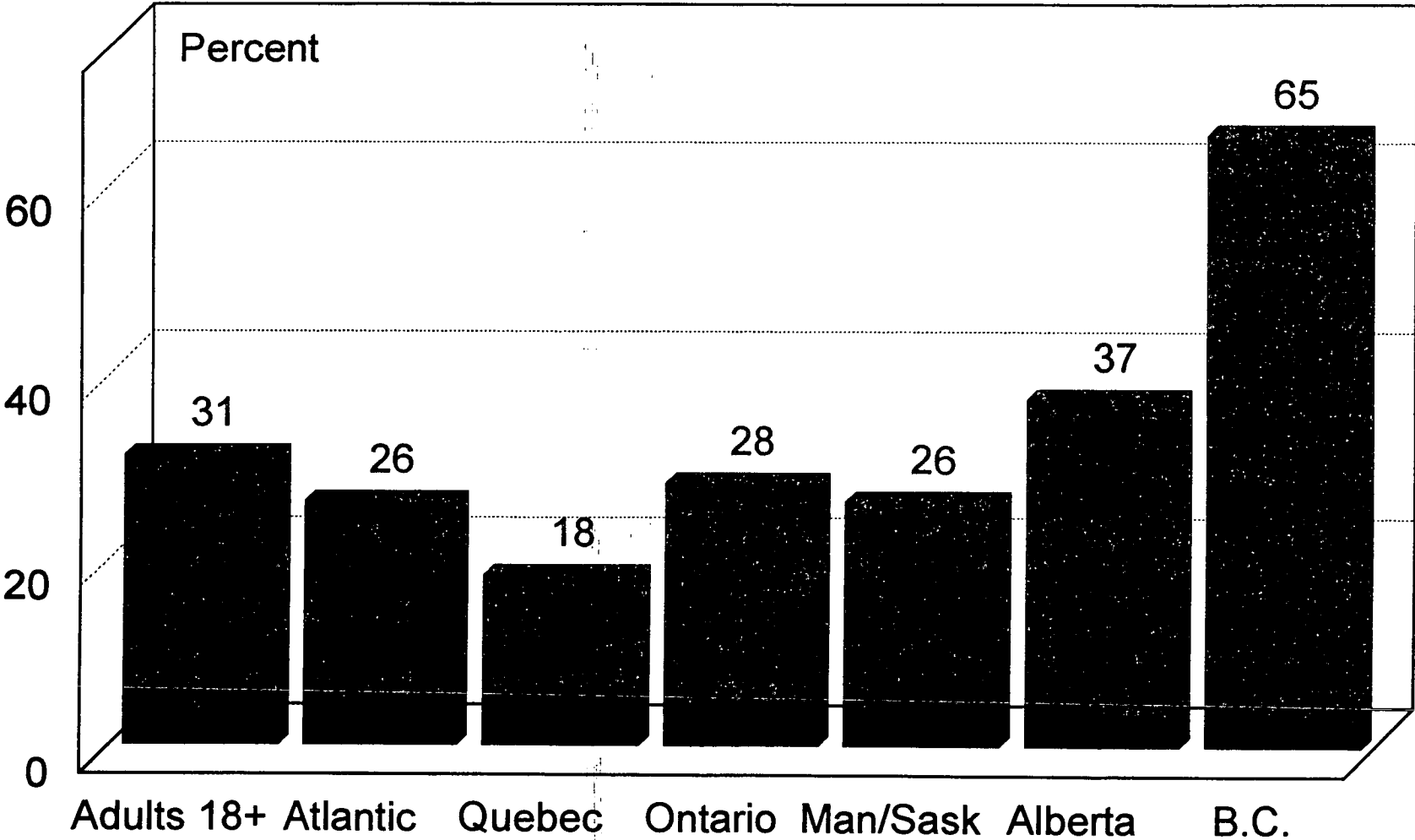
**Q. *Have you heard, read or seen anything about a meeting of leaders of Asian and Pacific economies in Vancouver this month?***

	<b>%</b>
<b>Yes</b>	<b>31</b>
<b>No</b>	<b>69</b>





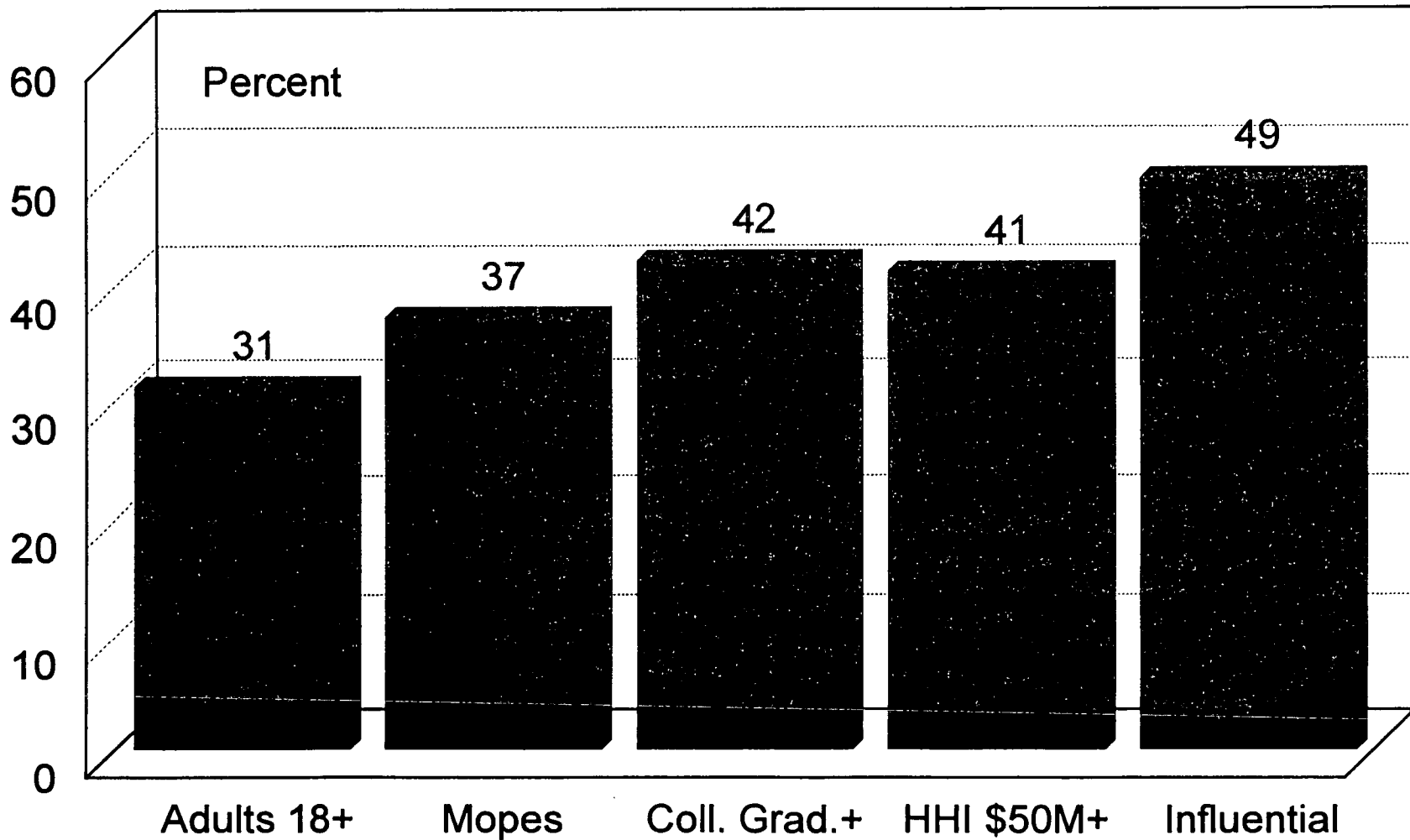
# PERCENT AWARE OF UPCOMING APEC MEETING IN VANCOUVER



Roper Canada: Nov/Dec '97



# PERCENT AWARE OF UPCOMING APEC MEETING IN VANCOUVER



Roper Canada: Nov/Dec '97



# ROPER REPORTS CANADA

FALL 1997

## ***PERCEPTION OF VANCOUVER MEETING*** *(Asked of those aware of meeting)*

***Q. Some people say that this meeting was useful because it helped to improve Canada's links with Asian and Pacific countries. Other people say that such meetings are a waste of time and money. Which view is closest to your own?***

	%
<b>Useful</b>	<b>76</b>
<b>Waste of time and money</b>	<b>24</b>



# ROPER REPORTS CANADA

FALL 1997

## *CANADA'S LEVEL OF FOREIGN TRADE*

### *WITH SPECIFIC COUNTRIES*

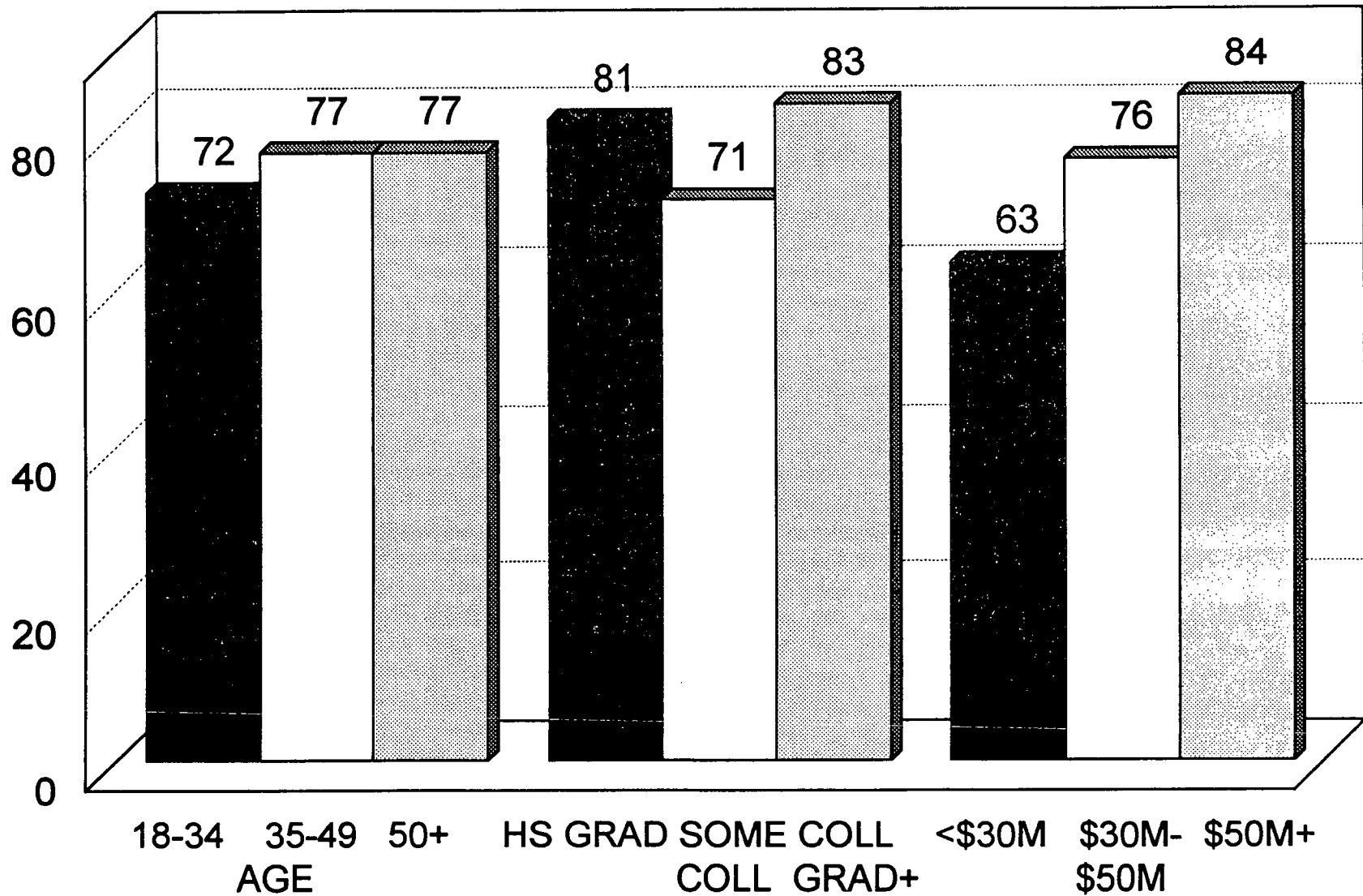
*Q. We'd like to find out how much you think Canada should be trading with certain specific foreign countries. At the present time, do you think we are trading too much, about the right amount, or not enough with...?*

		<b>Too Much</b>	<b>About Right</b>	<b>Not Enough</b>	<b>Don't Know</b>
<b>United States</b>	<b>%</b>	<b>20</b>	<b>49</b>	<b>15</b>	<b>16</b>
<b>Mexico</b>	<b>%</b>	<b>12</b>	<b>36</b>	<b>21</b>	<b>31</b>
<b>Brazil</b>	<b>%</b>	<b>6</b>	<b>27</b>	<b>22</b>	<b>45</b>
<b>United Kingdom</b>	<b>%</b>	<b>5</b>	<b>31</b>	<b>26</b>	<b>38</b>
<b>Germany</b>	<b>%</b>	<b>4</b>	<b>30</b>	<b>24</b>	<b>41</b>
<b>Japan</b>	<b>%</b>	<b>18</b>	<b>36</b>	<b>19</b>	<b>27</b>
<b>China</b>	<b>%</b>	<b>20</b>	<b>30</b>	<b>22</b>	<b>27</b>





# % CONSIDER VANCOUVER MEETING USEFUL IN IMPROVING LINKS WITH APEC COUNTRIES



Roper Canada: Nov/Dec '97



**ROPER REPORTS CANADA**

**FALL 1997**

***PACIFIC RIM***

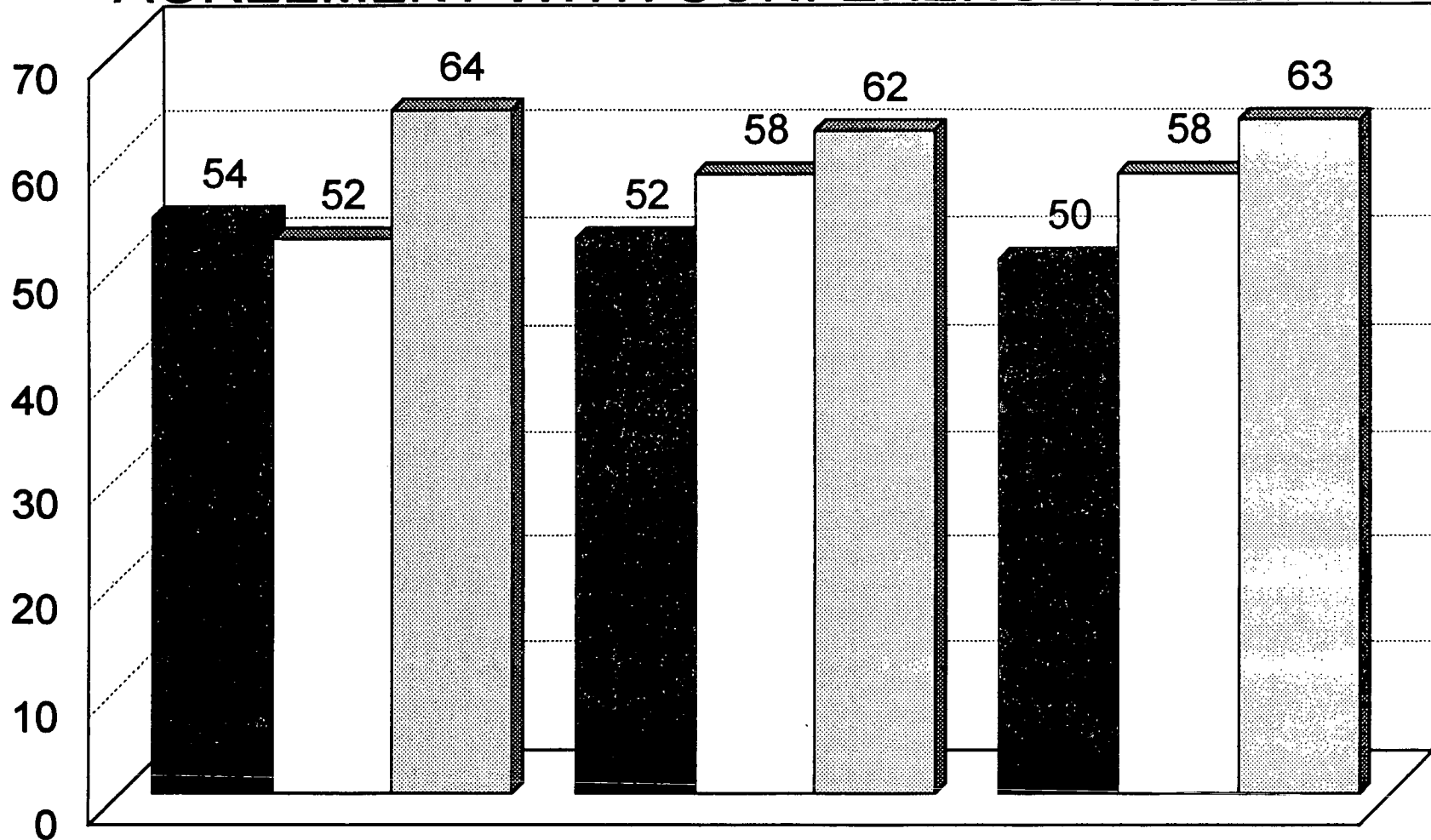
***FREE TRADE AGREEMENT***

**Q. *Do you think Canada should enter into a free trade agreement with the various Asian Pacific Rim countries attending the Vancouver conference?***

	<b>%</b>
<b>Strongly Agree</b>	<b>16</b>
<b>Somewhat Agree</b>	<b>37</b>
<b>Somewhat Disagree</b>	<b>14</b>
<b>Strongly Disagree</b>	<b>9</b>
<b>Don't know</b>	<b>23</b>
<b>Strongly/Somewhat Agree</b>	<b>53</b>



# STRONGLY/SOMEWHAT AGREE THAT CANADA SHOULD ENTER FREE TRADE AGREEMENT WITH CONFERENCE ATTENDEES



BLUE COLLAR OWC MOPES HS GRAD SOME COLL <\$30M \$30M-\$50M \$50M+  
COLL GRAD+

Roper Canada: Nov/Dec '97



***LEVEL OF TRADE***  
***BETWEEN SPECIFIC COUNTRIES***



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