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March 2002

Waiting for the Other Shoe to Drop

A POST-9/11/01 ANALYSIS
FOR DFAIT

Goldfarb Consultants



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Agenda

- ⇒ Who is Goldfarb Consultants?
- ⇒ What is the Goldfarb Report?
- ⇒ New questions of interest to DFAIT from the 2002 Goldfarb Report Questionnaire
- ⇒ The effects of September 11th on Canadians' attitudes and behaviours

Goldfarb Consultants

Dept. of Foreign Affairs
Min. des Affaires étrangères
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Who Is Goldfarb Consultants?

*Established 35 years ago,
Goldfarb Consultants is an international leader
in providing creative, strategic
research-based business solutions
with an exceptional team of people*

Part of the WPP Group of companies

Qualitative

Quantitative

The Goldfarb Report

Services Offered

Custom

Syndicated

Qualitative

Quantitative

The Goldfarb Report

What is the Goldfarb Report?

A strategic tool providing perspectives on both the “current state of the nation” and “trends in the Canadian marketplace.”

Helps governmental departments in setting overall policy direction and understanding the opinions of Canadians from coast-to-coast

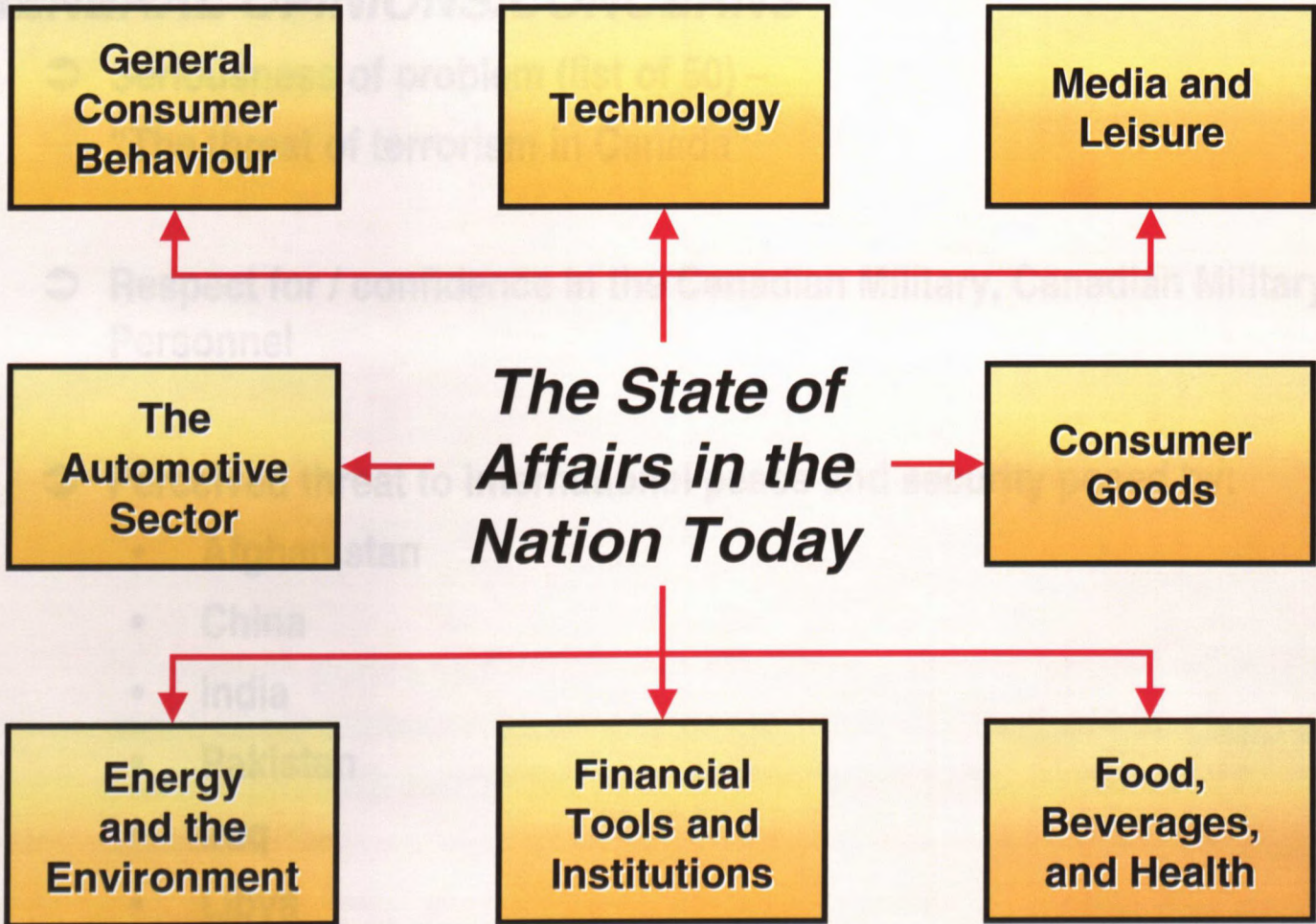
Research Methodology

Conducted annually since 1980, so results are supported by 20 years of trended data!

- ➔ Field work- early February
- ➔ National sample of 1600 Canadian adults (18+)
- ➔ Random telephone pre-recruit followed by mail-out
 - 200 page, self-administered questionnaire

***Providing the “link” between
Canadians and government***

The Sectors



New Questions for 2002 of Interest to DFAIT *(continued)*

GENERAL OPINIONS/CONCERNS

- ⇒ Seriousness of problem (list of 50) –
 - “The threat of terrorism in Canada”

- ⇒ Respect for / confidence in the Canadian Military, Canadian Military Personnel

- ⇒ Perceived threat to international peace and security posed by:
 - Afghanistan
 - China
 - India
 - Pakistan
 - Iraq
 - Libya
 - Russia
 - United States

New Questions for 2002 of Interest to DFAIT (continued)

PERSONAL OPINIONS RE: SECURITY/LIBERTY BALANCE

➔ Level of agreement with statements such as:

“It is better to live in an orderly society than to allow people so much freedom that they become disruptive”

“People who have been detained by the Canadian police on suspicion of terrorism are probably guilty of something”

“Canadian police and other security forces should be able to detain indefinitely without charge any person they suspect of being associated with terrorism even if this violates that person’s civil liberties”

New Questions for 2002 of Interest to DFAIT (continued)

TRAVEL

- Expectations for travel in coming six months (travel less/as normal)
- Perceptions of safety of travel in U.S. and Canada by air, train
- Amount of extra money willing to pay for added air security
- Amount of extra time willing to arrive early for flights to allow for added security checks



Goldfarb Report Data

Data Collection Timeframes

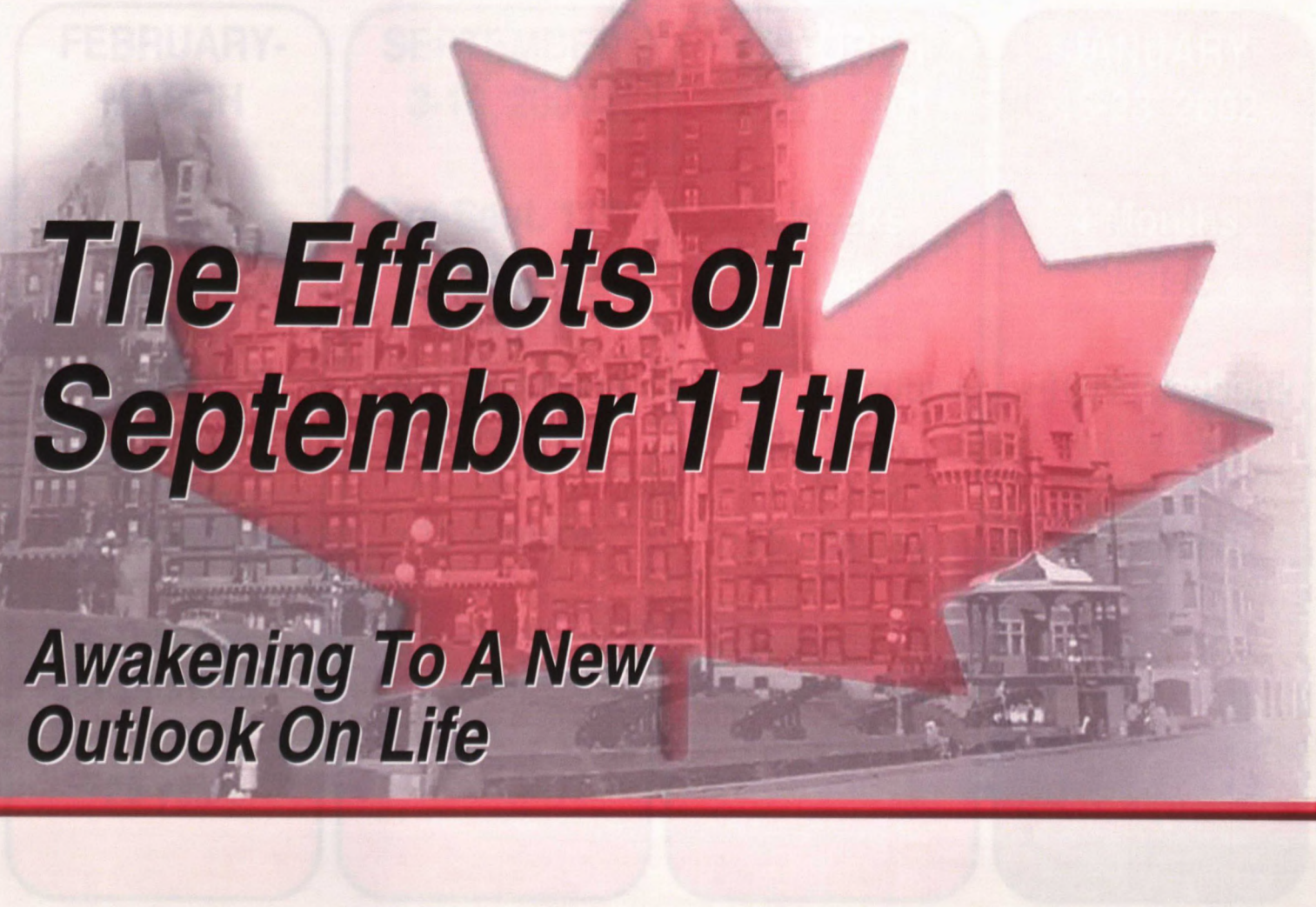
FEBRUARY-

SEPTEMBER-

DECEMBER-

The Effects of September 11th

***Awakening To A New
Outlook On Life***



Goldfarb Report Data

Data Collection Timeframes

**FEBRUARY-
MARCH**

Annual

- 1600 adult Canadians 18+
- Self-completes
- 200-page questionnaire
- 22 years

**SEPTEMBER
3-10, 2001**

Pre-Sept. 11th
Benchmark

- 800 telephone interviews
- 15 minutes

**OCTOBER
23-29, 2001**

6 Weeks
Later

- 1000 telephone interviews
- 15 minutes

**JANUARY
15-23, 2002**

4 Months
Later

- 1000 telephone interviews
- 15 minutes

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Time Has Become Today's Currency

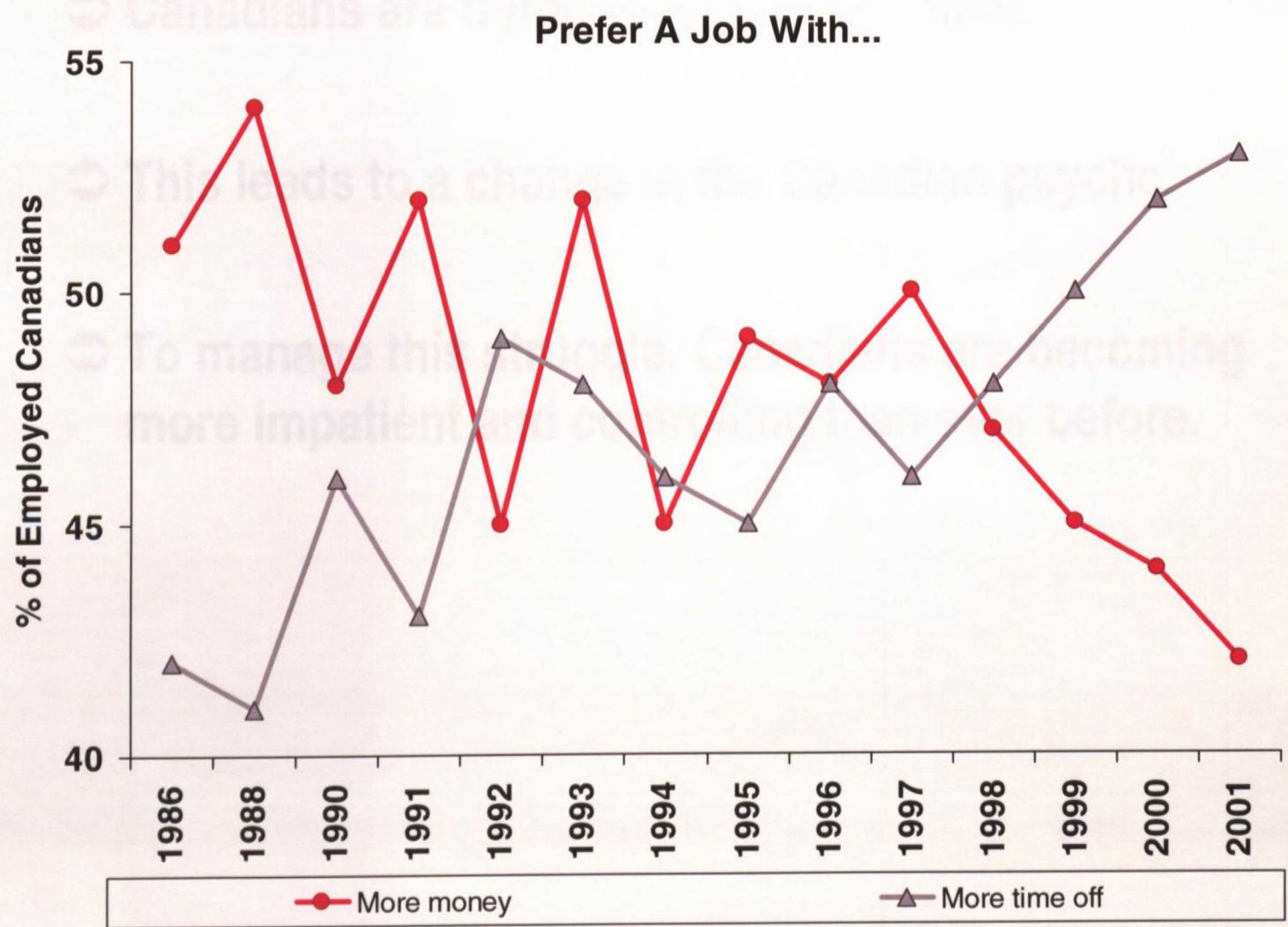
Defining Normal

*The Canadian of
pre-September 11th*

More money

More time off

Time Has Become Today's Currency





The “Struggle to Juggle”

- ⇒ Canadians are trying to juggle their time.
 - ⇒ We've become a "society of editors"
- ⇒ This leads to a change in the Canadian psyche.
 - ⇒ If something does not engage us immediately, we
- ⇒ To manage this struggle, Canadians are becoming more impatient and controlling than ever before.

A Society of Editors

- ⇒ We've become a 'society of editors'
- ⇒ If something does not engage us immediately, we gloss over it or 'delete' it – no questions asked.



The Canadian Pre-September 11th

Impatient
Controlling

The Competition Is Not Only Other Brands...

The Competition Is Life

The Canadian Pre-September 11th

- ⇒ Impatient
 - ⇒ Controlling
 - ⇒ Empowered
 - ⇒ Lacking in loyalty
-

= Already hard-to-reach consumers



Waiting For The Other Side To Drop

Likelihood of each happening in the next 12 months...

Redefining Normal

***The Canadian Response
After September 11th***

Explosion of a nuclear bomb in N.A.

20

Waiting For The Other Shoe To Drop

Likelihood of each happening in the next 12 months...

*following the news of
"Terrorism"...*

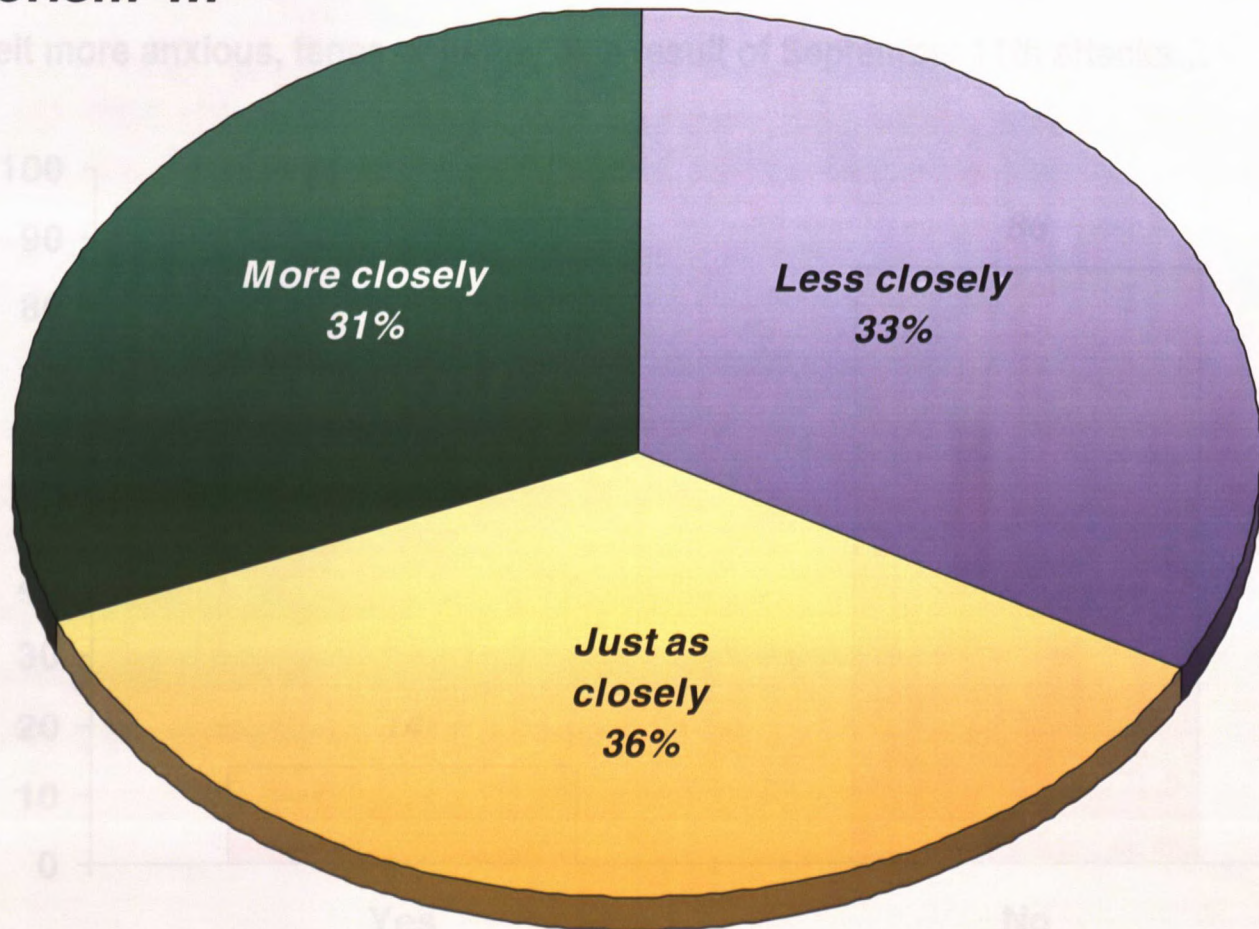
**% of Adult
Canadians –
Jan. 2002**

Attack in the U.S. by terrorists or radicals	83
Economic depression in N.A.	53
Artificially spread disease like anthrax or small pox in N.A.	48
Attack on an airplane in N.A. like what happened on Sept. 11th	47
Mass contamination of drinking water system in N.A.	42
Use of biological weapons in N.A.	41
Large-scale conventional war involving the Canadian armed forces	35
Attack in Canada by terrorists or radicals	27
Explosion of a nuclear bomb in N.A.	20



“War on Terrorism” Continues to Engage Canadians

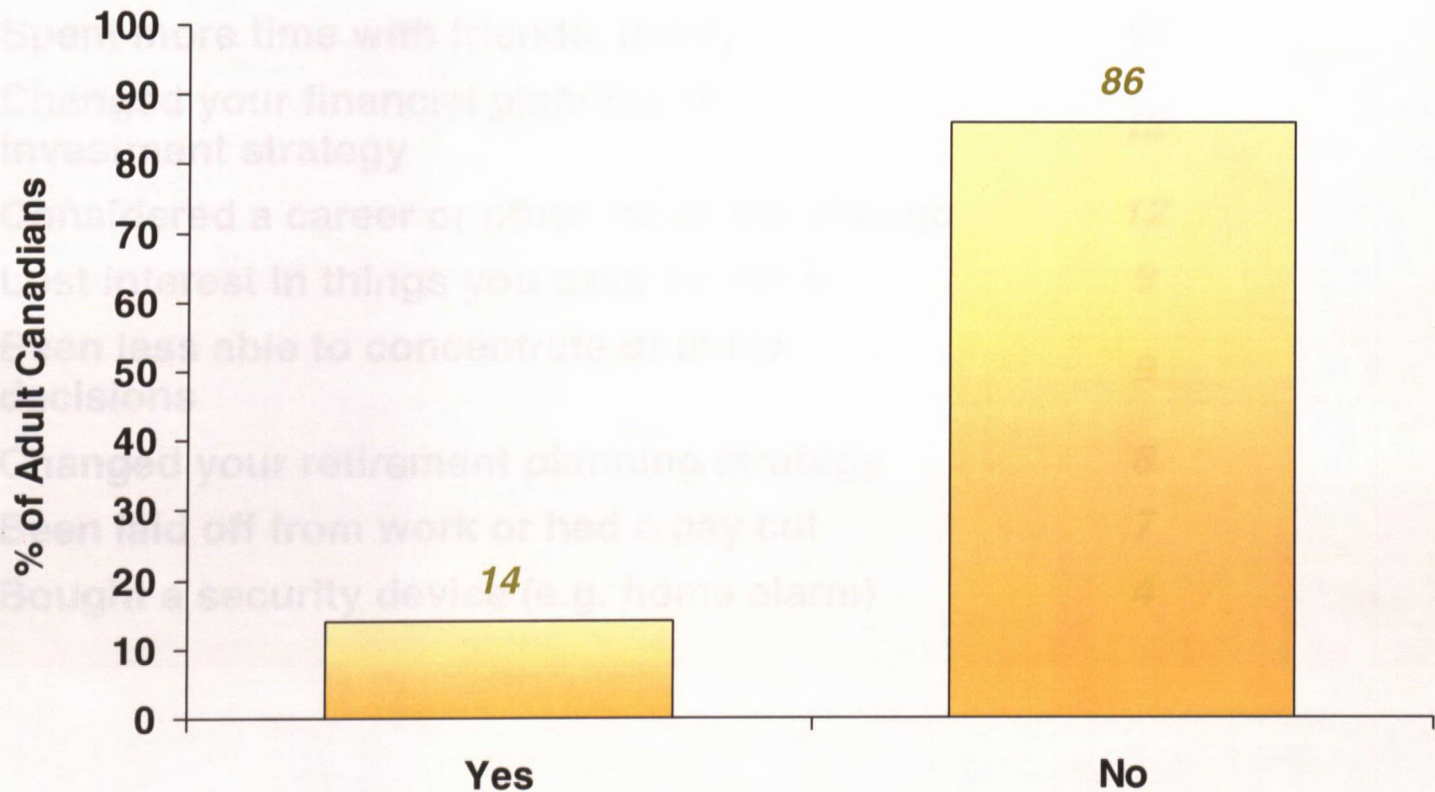
Compared to last October, how closely are you following the news coverage of the “War on Terrorism”...



Majority of Canadians Going About Their Lives

- Majority of Canadians still shopping, sleeping soundly, travelling and going about their lives

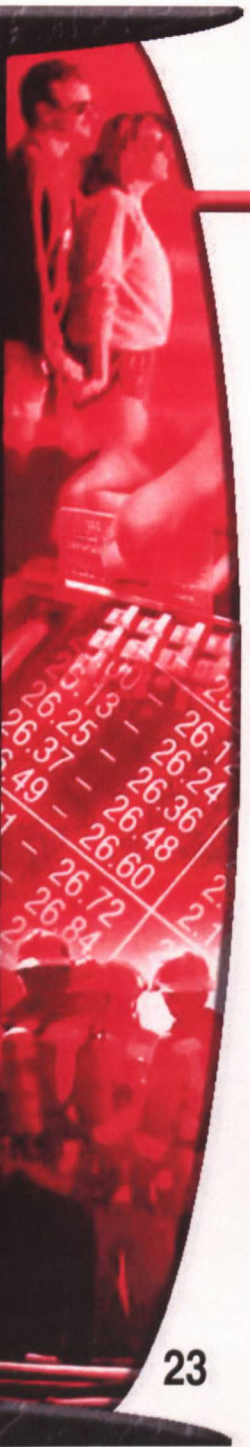
Felt more anxious, tense or jumpy as a result of September 11th attacks...



The World Did Not Change for Most Canadians...

As a result of September 11th attacks, have you...

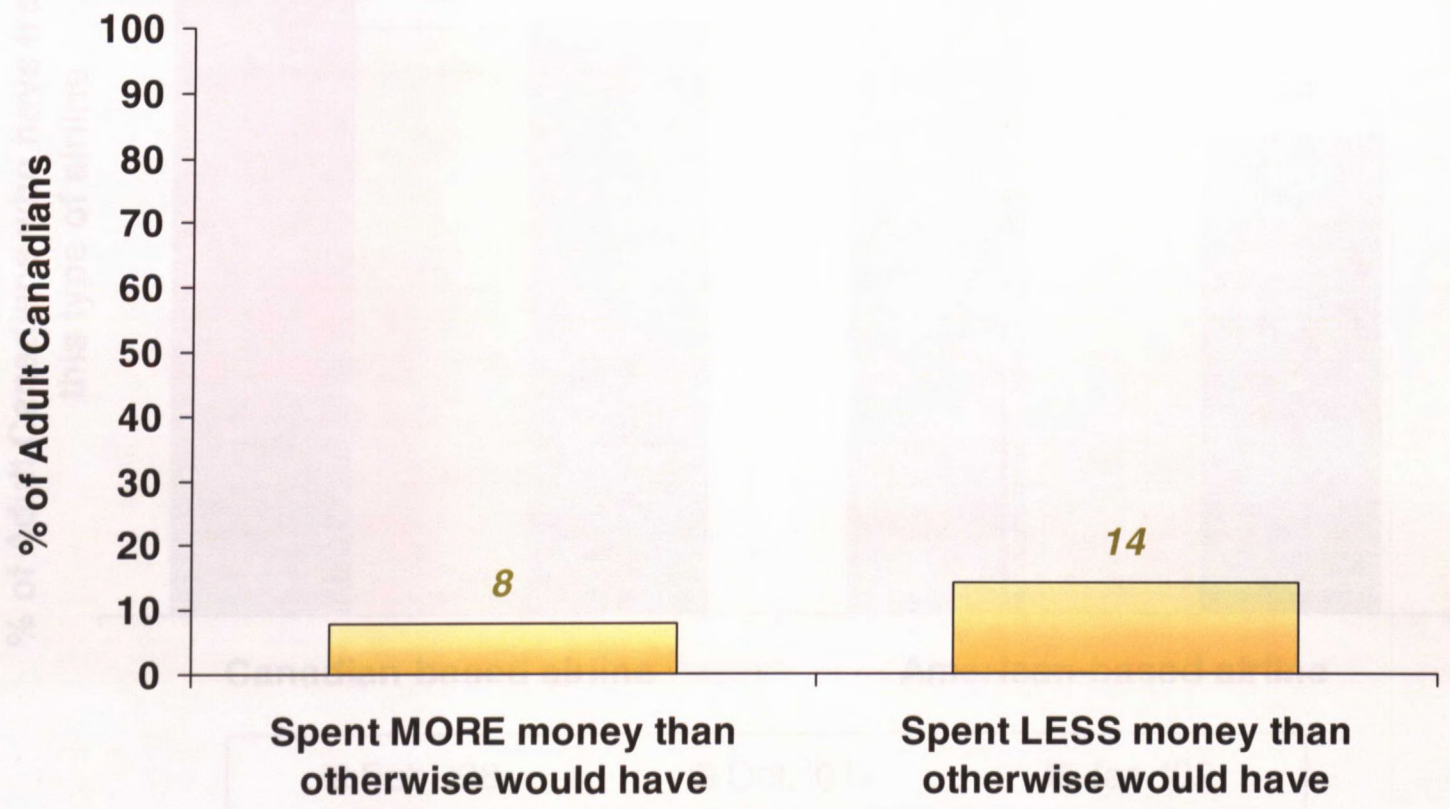
	% of Adult Canadians – Jan. 2002
Kept up with the news more	72
Spent more time with friends, family	40
Changed your financial planning or investment strategy	12
Considered a career or other major life change	12
Lost interest in things you used to enjoy	9
Been less able to concentrate or make decisions	9
Changed your retirement planning strategy	8
Been laid off from work or had a pay cut	7
Bought a security device (e.g. home alarm)	4



...and Neither Did Their Spending Habits

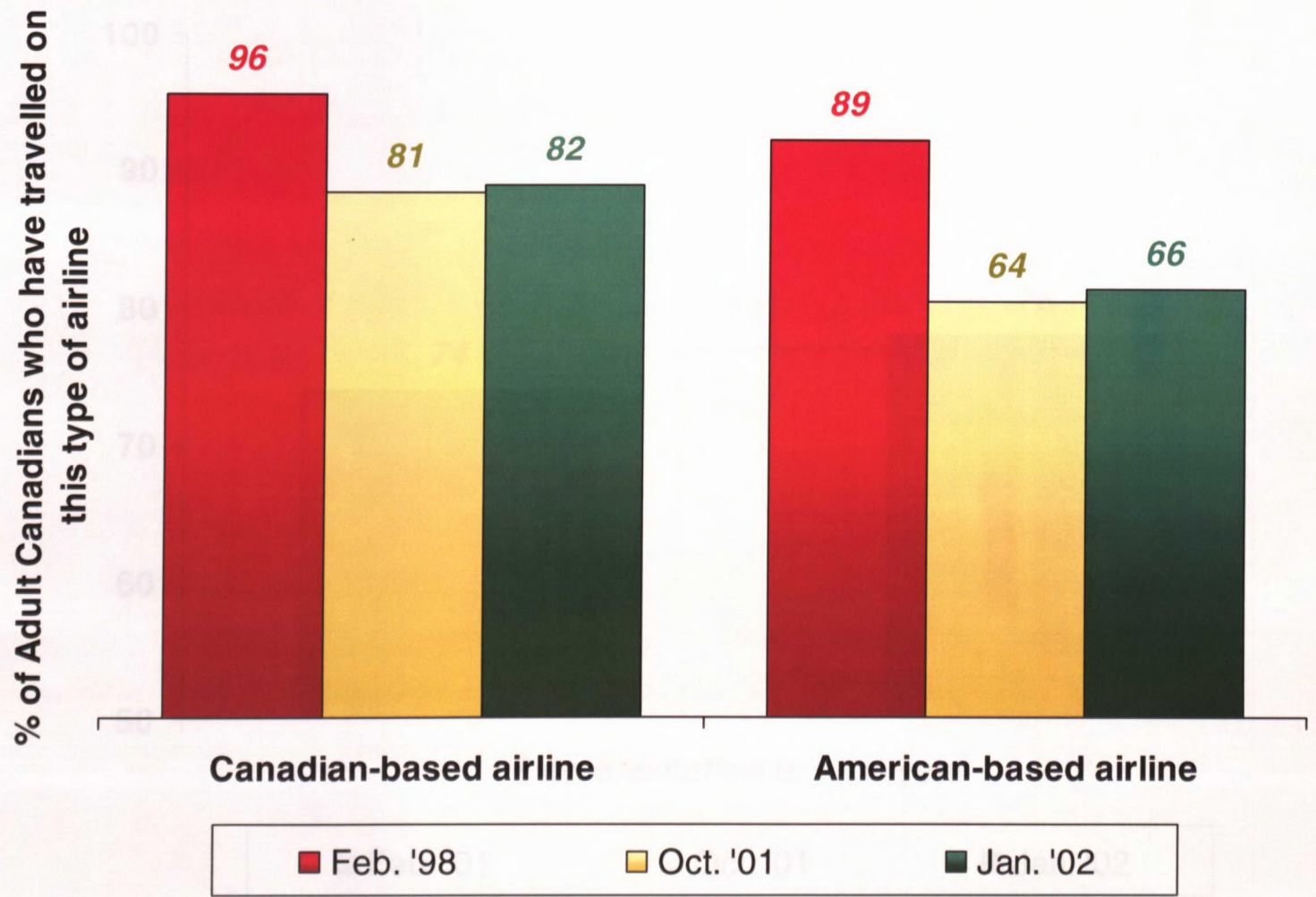
- ➔ Canadians did not alter their spending habits to any significant degree as a direct result of the September 11th attacks.

As a result of September 11th attacks, have you...



Increased Fear of U.S. Airline Travel...

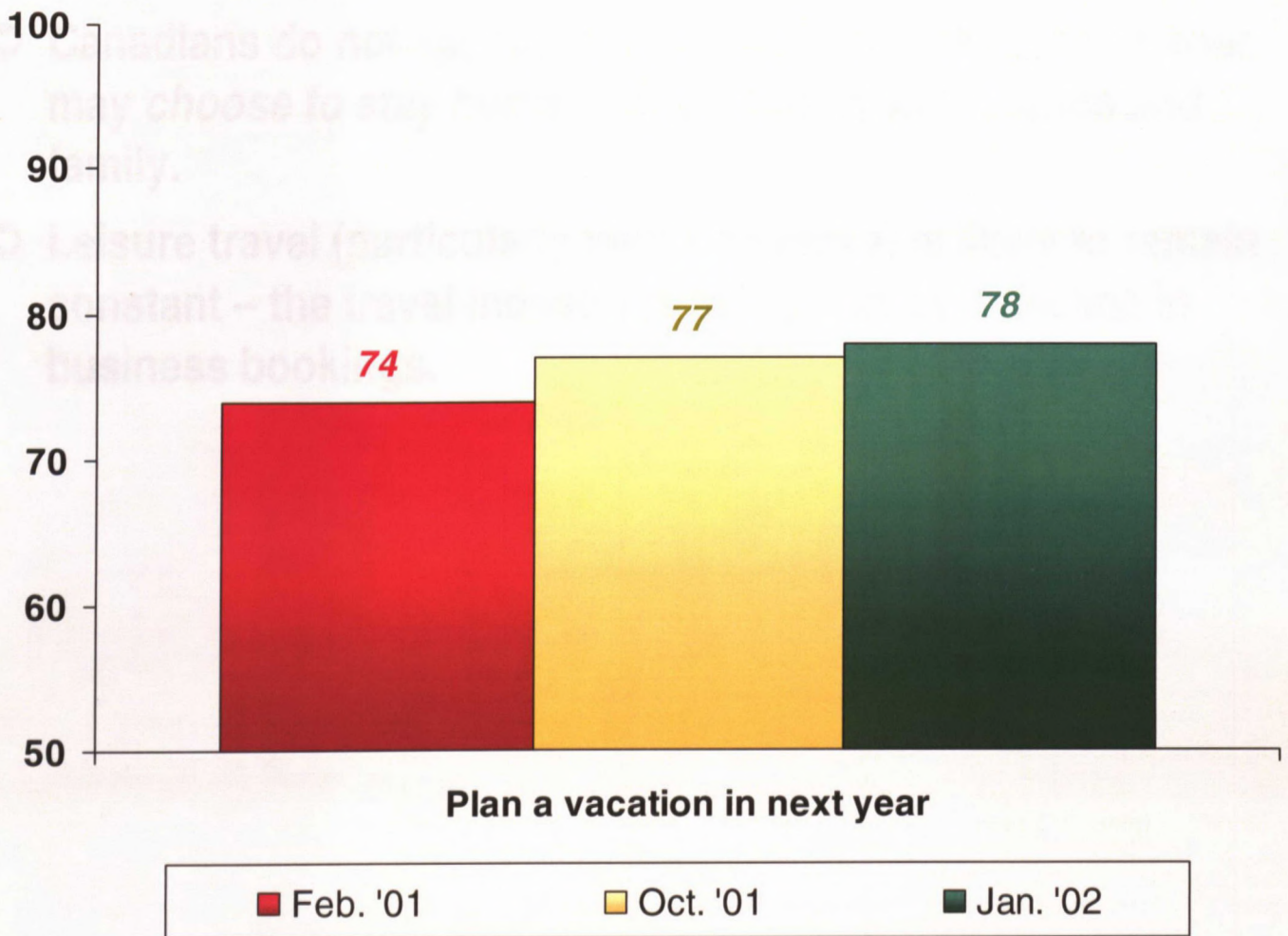
Feel safe when you are travelling on a...





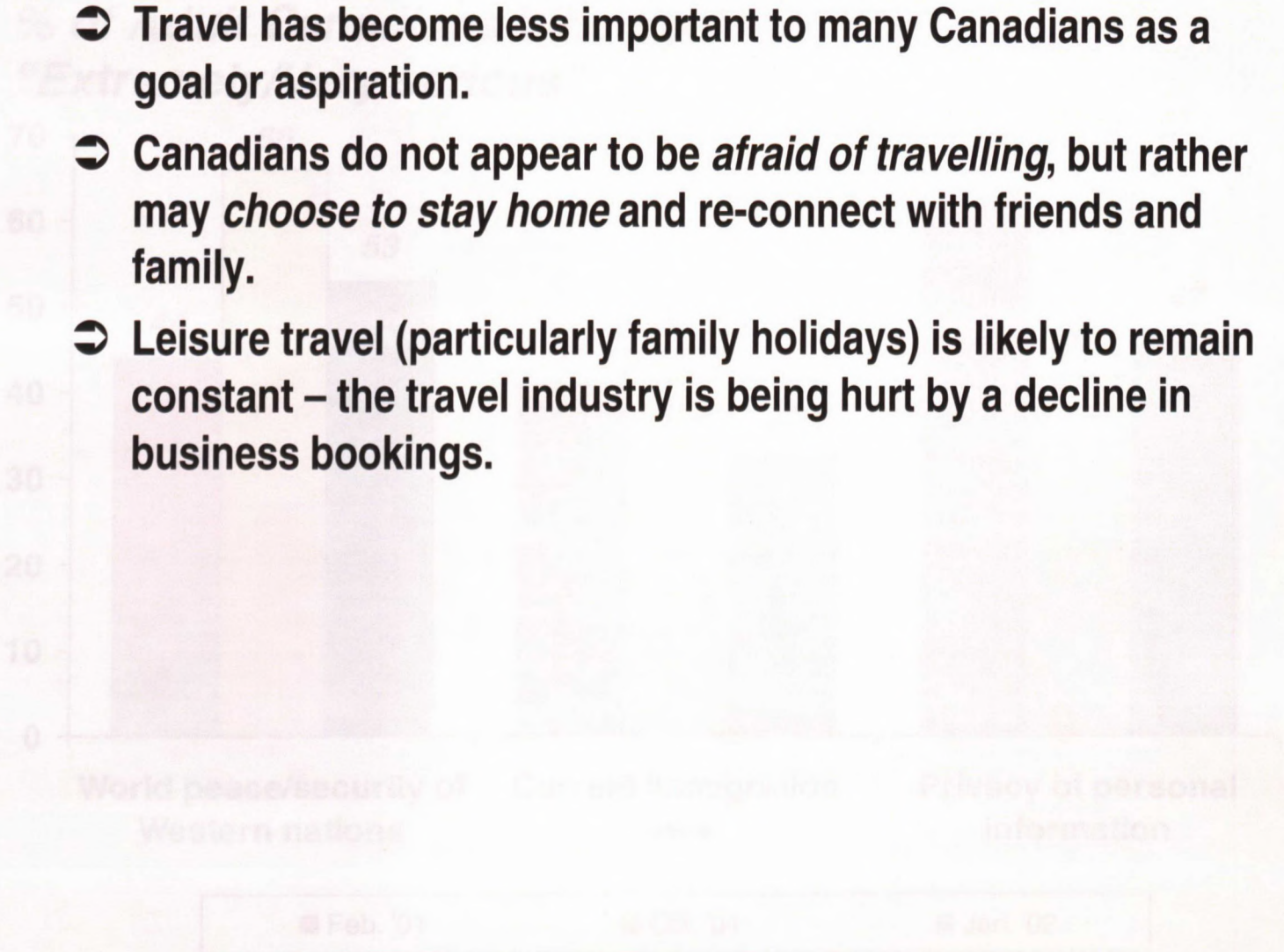
...Has Not Impacted Personal Travel Plans

In the next year, plan to vacation...



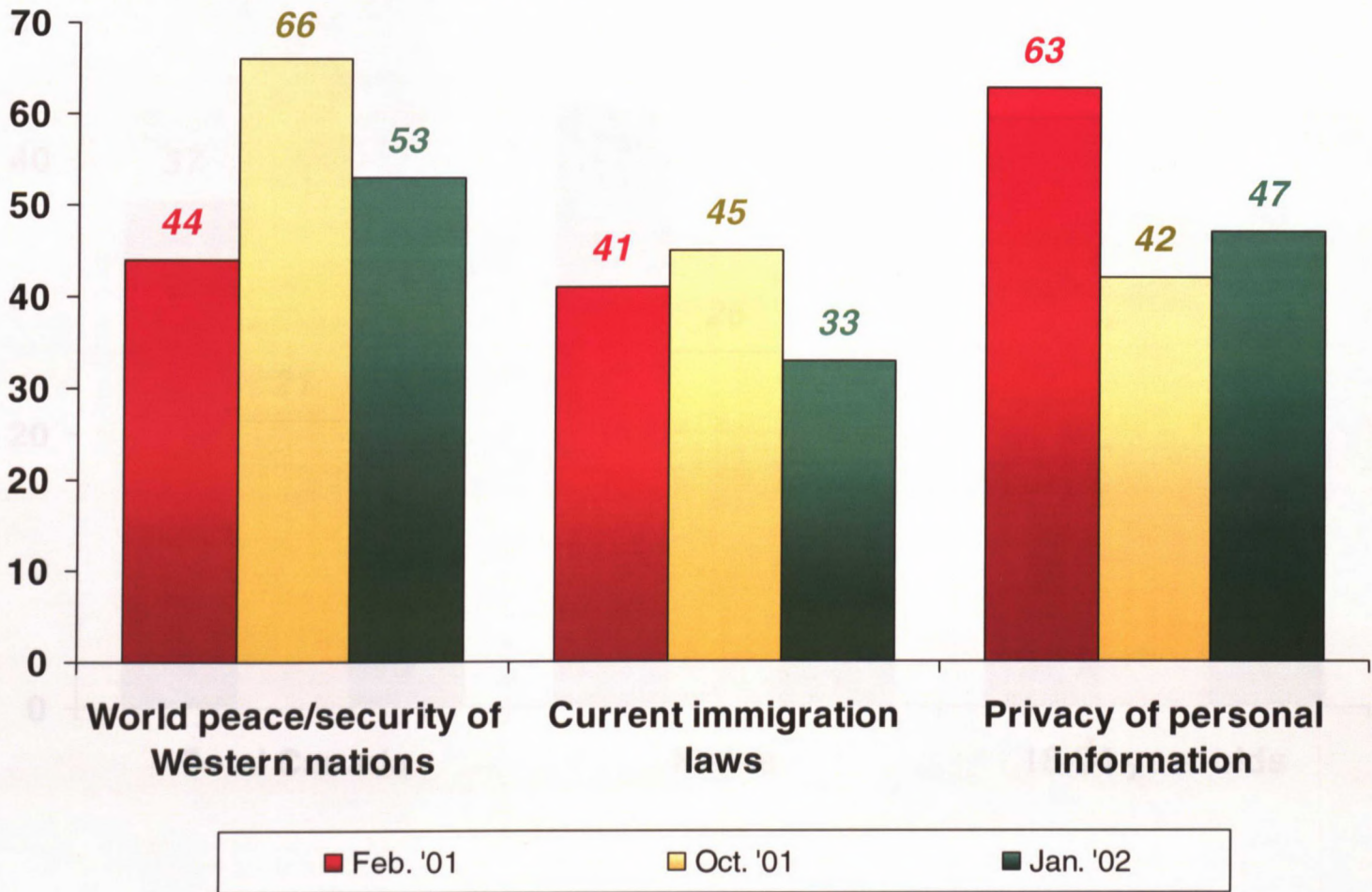
Desire to Travel Superseded by Need for Friends, Family and Comforts of Home

- Travel has become less important to many Canadians as a goal or aspiration.
- Canadians do not appear to be *afraid of travelling*, but rather may *choose to stay home* and re-connect with friends and family.
- Leisure travel (particularly family holidays) is likely to remain constant – the travel industry is being hurt by a decline in business bookings.



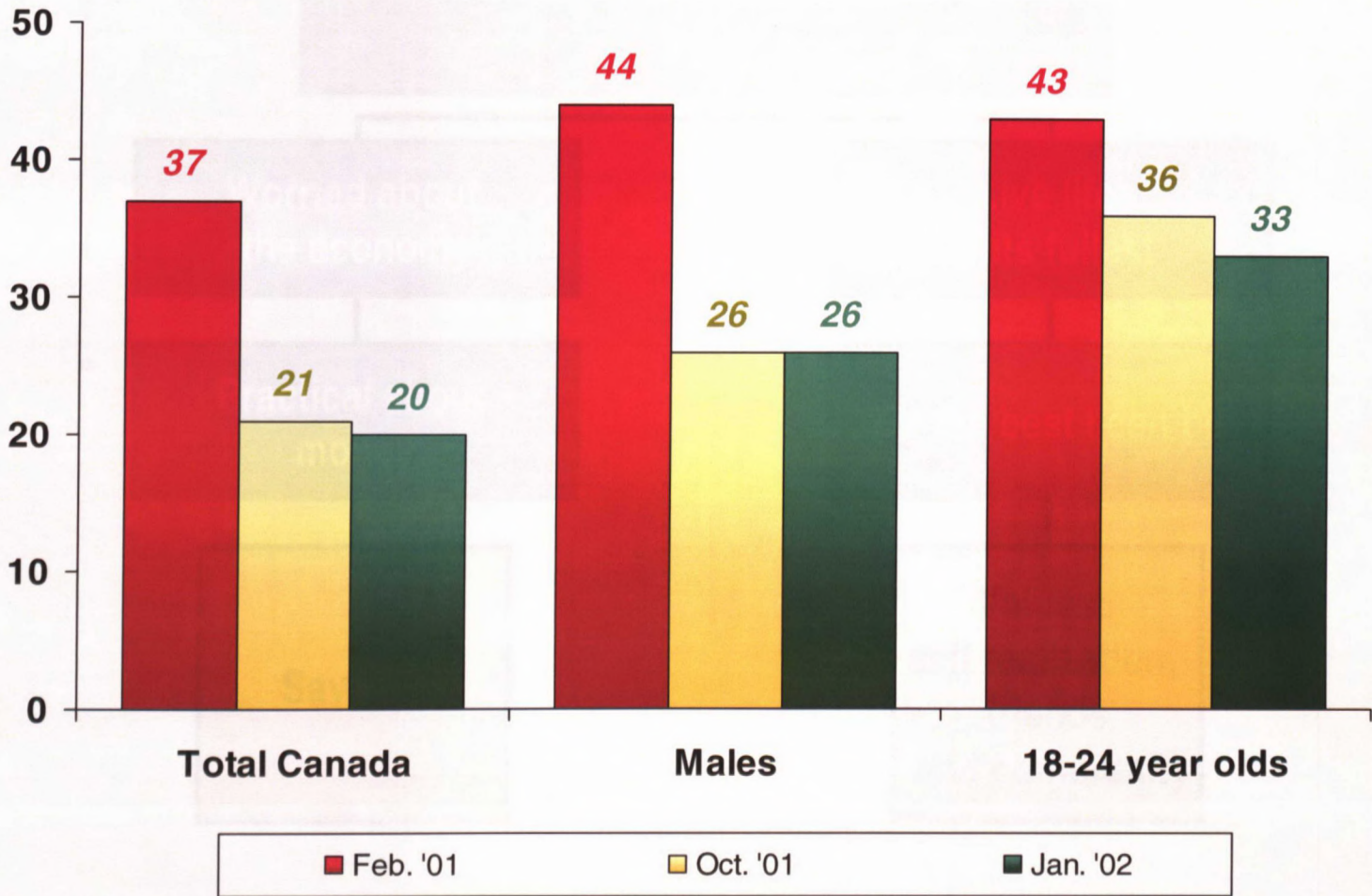
Seriousness of Issues Wanes

% of Adult Canadians Who Feel Issue is "Extremely/Very serious"



U.S. Has Lost Its Allure

Definitely or Probably Accept a Job in the U.S. with Better Pay and Lower Taxes



Conflicting Consumer Attitudes



Slight Optimism for Short-Term Economy

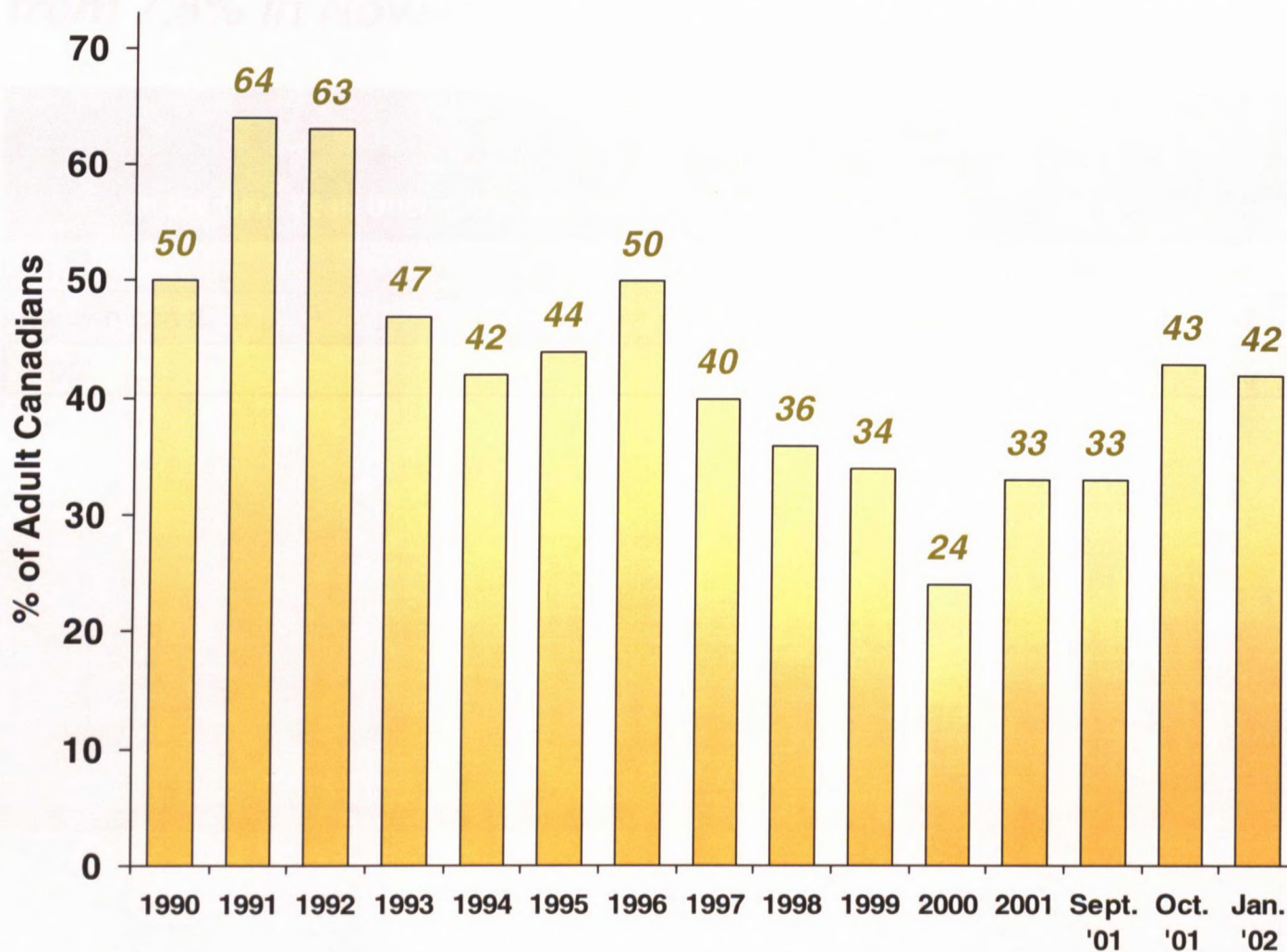
➔ In the next year, expect economic conditions in your area to...

% of Adult Canadians

	Oct. 2000	Sept. 2001	Oct. 2001	Jan. 2002
Change for the better	35	30	27	32
Remain the same	45	44	41	42
Change for the worse	17	24	31	25

Unemployment Expectations Stagnant

In the next year, expect unemployment rate will rise...

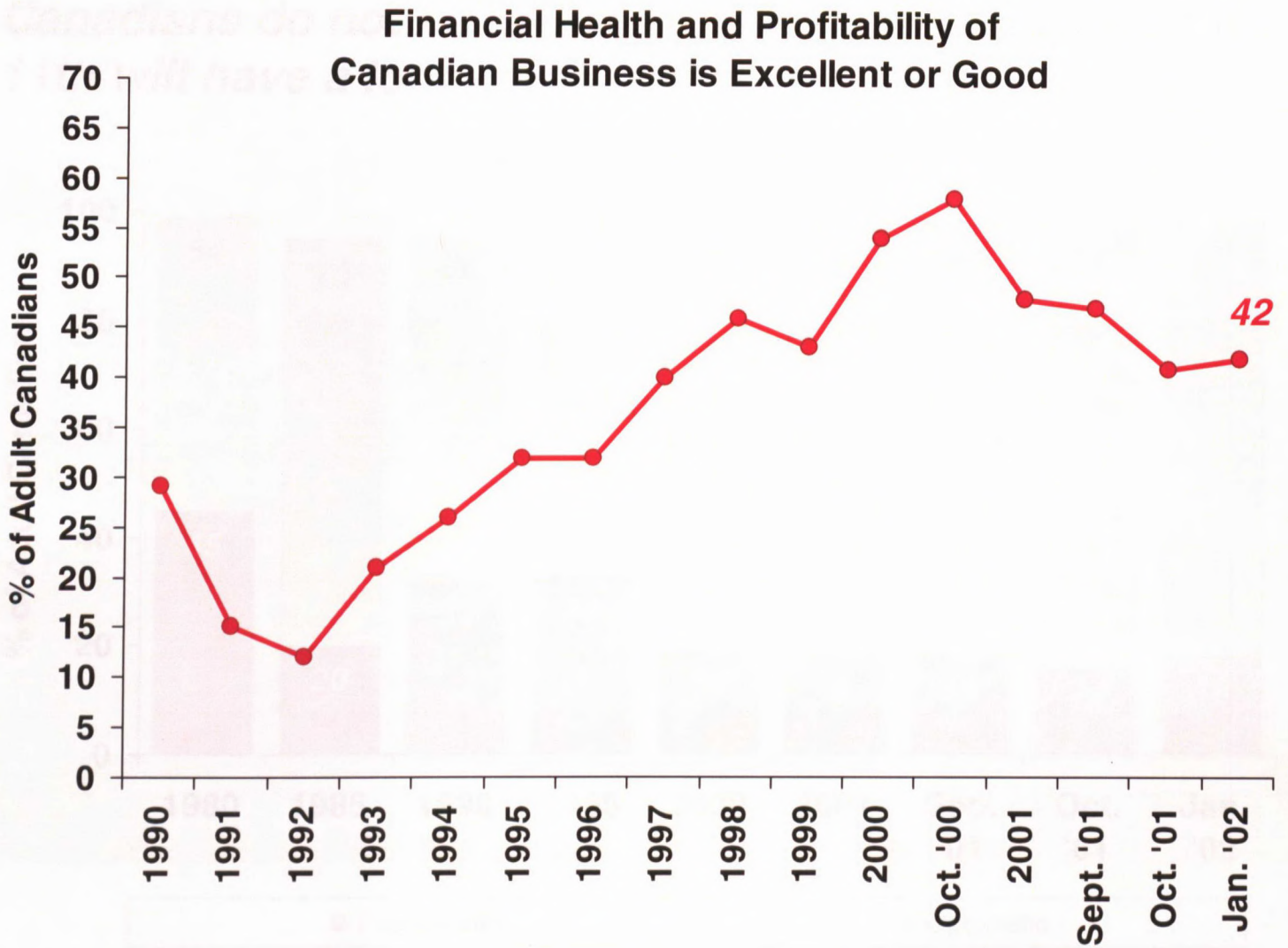


An Undertone of Optimism

Despite the jobless rate increasing to 8% in December from 7.5% in November

In the Next Year, Unemployment Rate will...	% of Adult Canadians		
	Oct. 2001	Jan. 2002	% Point Change
Climb	43	42	-1
Remain constant	41	37	-4
Drop	16	21	+5

Canadians' Outlook On Business Is Encouraging

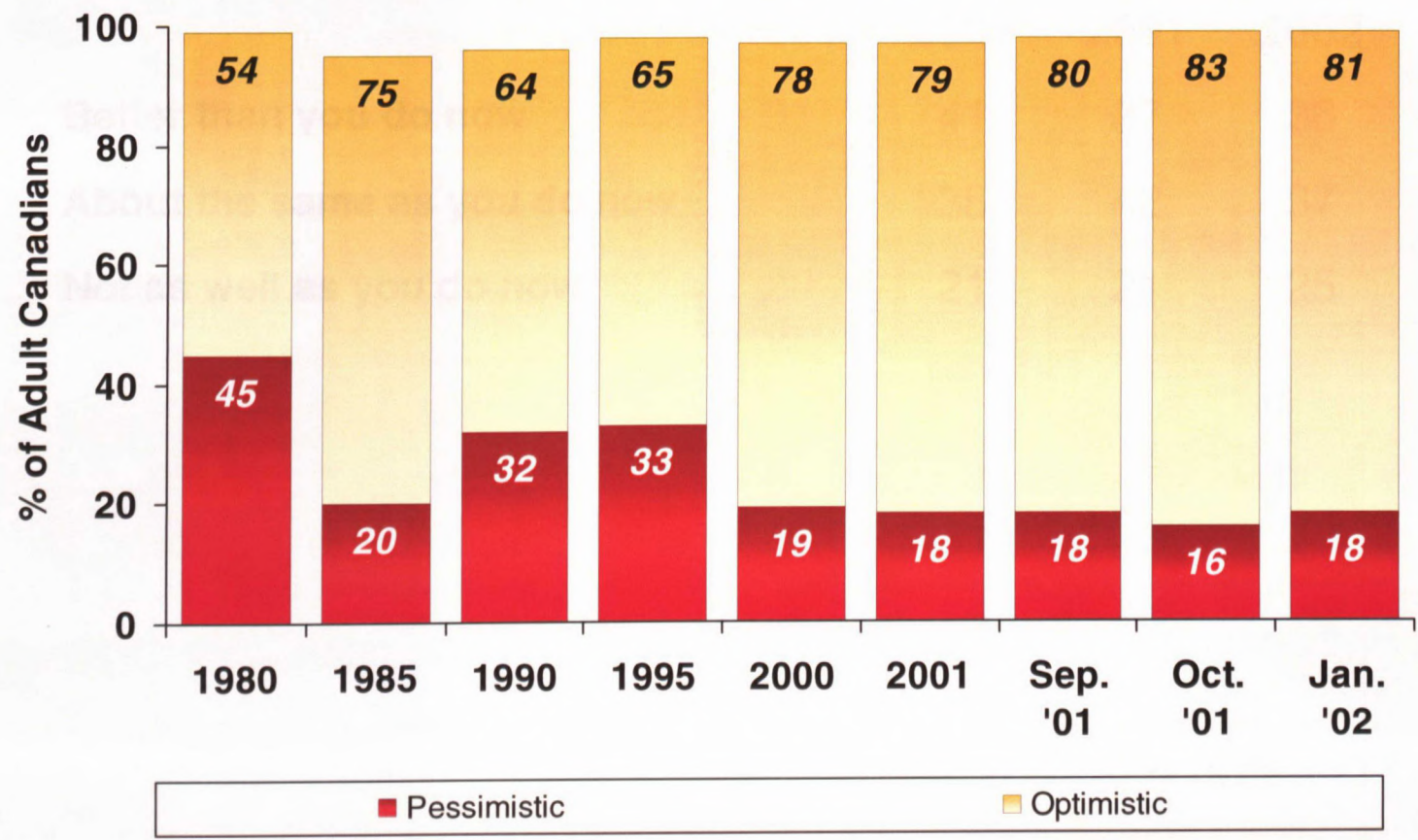




Optimism for the Future ...

Canadians do not believe that the events of September 11th will have a long-term impact on Canada's future.

Outlook for Next 5 Years





... And For the Very Long Term

*Expect that in the future your children will live...
(based on those who answered)*

% of Adult Canadians

	Feb. 1991	Feb. 2001	Oct. 2001	Jan. 2002
Better than you do now	31	41	37	36
About the same as you do now	41	38	42	37
Not as well as you do now	28	21	21	25

A Renewed Commitment to the Things That Matter

Importance re: personal goals and aspirations

% SAYING VERY IMPORTANT	% of Adult Canadians		
	Feb. 2001	Oct. 2001	% Point Change
Your health, keeping in good physical condition	66	86	+20
Cultivating friends	52	67	+15
Getting married / having a happy marriage	67	64	-3
Having children / raising a family	66	63	-3
Being highly educated, personal growth	39	63	+24
Helping others more than yourself	33	59	+26
Being outstanding in your field of work	36	54	+18
Having a full, satisfying, religious / spiritual life	33	38	+5
Maximizing your personal leisure time / working as little as possible	17	28	+11
Travel	31	18	-13
Being well-to-do, accumulating wealth	14	17	+3

Focus on Improving Social and Physical Well-being

Importance re: personal goals and aspirations

% SAYING VERY IMPORTANT	% of Adult Canadians		
	Oct. 2001	Jan. 2002	% Point Change
Your health, keeping in good physical condition	86	87	+1
Cultivating friends	67	70	+3
Getting married / having a happy marriage	64	61	-3
Having children / raising a family	63	61	-2
Being highly educated, personal growth	63	60	-3
Helping others more than yourself	59	58	-1
Being outstanding in your field of work	54	52	-2
Having a full, satisfying, religious / spiritual life	38	38	0
Maximizing your personal leisure time / working as little as possible	28	28	0
Travel	18	19	+1
Being well-to-do, accumulating wealth	17	19	+2

Rise in Nationalism/Nationhood

Importance re: guiding principles or values

- ➔ Rise in patriotism a natural off-shoot of any military engagement.
- Olympic success likely to fuel this patriotism in the short-term.

% SAYING IMPORTANT (8,9,10/10)	% of Adult Canadians		
	Feb. 2001	Jan. 2002	% Point Change
Not letting your family down	85	89	+4
Respect for law and order	76	86	+10
Maintaining high ethical conduct in job/life	80	85	+5
Not letting your employer down	69	68	-1
Preservation of Canadian heritage	60	68	+8
Patriotism, commitment to your country	57	65	+8
The usefulness to society of the work you do	56	59	+3
Giving back to society by volunteering your time	47	57	+10
The need to redistribute wealth in our society	47	54	+7

Poppy Sales at All-Time High

- ➔ Sales of the Remembrance Day poppy in 2001 were at an all-time high across the country (17 million)
- ➔ “We’ve run out and that’s never happened since it all started in 1921” said Royal Canadian Legion Spokesperson.



www.GoldfarbReport.com

- Thousands of questions available by 15 demographic categories***
- Six years (1996-2001) of data***

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Any questions?





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Waiting for the other shoe to drop
: a post-9/11 analysis for DFAIT.

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