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PERCEPTIONS AND REALITIES OF NORTH AMERICA:
WHAT THE POLLS SAY ABOUT CANADIANS AND
AMERICANS REGARDING SECURITY AND THE ECONOMY

Michael Colledge[†]
Canadian Speaker

David mentioned we are a French-based company. It is actually better for me in Ottawa, because before we were a British Columbia-based company, which caused more consternation in Ottawa than being from France. Though it has actually been an improvement, it probably has not helped Tom, but it certainly has boosted my prospects. One of the things in consulting with David before this session is that he said please tell people when you have done your surveys, because he had been to a presentation where someone presented four year old data as if it had happened yesterday. I am going to tell you upfront I am going to hop back and forth from today; back to Canadian views post 9-11 and then back again to spring 2001. These are all from national random telephone surveys, some syndicated and omnibus work we have done. Certainly we did not have to go out and recreate the wheel. A lot of this is on our clients' agenda in Ottawa. So, it is not like we went out to look for new data and new question lines for this conference. It is clearly on the radar screen.

DOMESTIC ISSUES

Back to post 9-11. I put this issue in because Canadians were probably the most challenged on the security front and focused on terrorism. It was very much about the economy for them. They expressed concern, wanted their

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Government to do something on it, but very much looked forward to a more balanced approach moving forward.

The most negative effect they saw coming out of 9-11 was what may happen to the economy despite the fact that at that time consumer confidence stayed pretty high. They saw some urgent issues on the security file. As they looked down the road a year, they said the Government is going to have to get back to some domestic issues like healthcare, education, and take a much more balanced approach. What was interesting is that the key issue for whether they were concerned about 9-11 in an economic sense or a terrorism sense was their views on Canadian initiation of improvements on the Canada-U.S. border. Today, Canadians are very positive on the future of the economy and things have not changed that much post 9-11 as far as Canada-U.S. views, even with Iraq.

When you go back to August and look at some work we did pre 9-11, there is been a bit of a decline in the movement towards a closer economic relationship. I am going to go back to Spring 2000. This is a question we ask on a monthly basis. What are the most important issues facing Canada? Medicare and healthcare are at 41 percent indicating we are still seeing a domestically driven agenda. Terrorism and security in Iraq are at 17 percent and education is at 15 percent. On down the line, SARS is relatively new. This is data from last week, but there is still a very strong focus on domestic issues.

That was a snapshot in time, but it is interesting to nets up economic, social, and international terrorism issues. If you went back to the mid1990's, you would see the economic issues at the top of the scale around 120 and then social issues at the bottom. A thing called national unity, which has all but disappeared as an issue in Canada over the last couple years, used to be there but has fallen off the chart completely. Since about 1995, social issues, healthcare, education, and the environment have pushed to the top of the agenda and stayed there with one exception. In October 2001, the terrorist attack in New York pushed them off the agenda. Terrorism along with a set of international issues on foreign policy, and Canada's role in the world pushed them off. Healthcare and the Medicare file quickly returned by January of 2002 as a primary a primary focus.

The economy, which was sitting at around a net of 54 in January of 2000, has been in a steady decline down to 25 points. That does not mean Canadians do not care about the economy. In fact, the shift is because they think the economy has been going so well, they let it sort of drop off their radar screen. The trend over the last couple months with the war and the wrap-up to war leans towards international issues. They have started to come back up the agenda.

VIEWS ON IRAQ

On the Iraq conflict, Canadians, over the course of January and February, steadily moved towards agreement that the United Nations had enough evidence to authorize military action against Iraq. Early in January, around 40 percent of Canadians said we should go forward with United Nations. By late February those who said we should go with the U.N had dropped to 51 from 54. As of March 26th, the majority of Canadians said they would have supported Canadian involvement if the United Nations had sanctioned it. That sat at 64 percent versus only 24 percent who opposed it; Canadians very much wanted a multilateral approach when it came to dealing with the situation in Iraq.

However, with in a week of the war starting, support for this question had increased to 69 percent. It was 59 percent before, so we had about a ten-point jump in the first week of the war. Similarly, 68 percent of Canadians said that the U.S. needed to make a stronger case before we would have committed Canadian troops. Again, there was a ten-point decline in the first week of the war. We dropped from 73 to 63 as the war started.

Canadians are split. Equal numbers agreeing and disagreeing that Canada should support the U.S. efforts because they are our closest neighbor and ally. We saw a pretty significant shift in the first weeks of the war. The numbers were at 39 percent before the war started and had climbed to 46 percent by then. Canadian views were clearly moving closer towards supporting the U.S. Even the question, "I am confident in the Bush Administration's ability to handle the situation in Iraq," was at 32 percent before the war and steadily climbed to 42. Confidence in the government of Canada to handle the Iraq situation saw similar shifts in the opposite direction. It was 52 before and declined to 43. While Canadians prior to the war may have been thinking we wanted a multilateral agreement and approach, their hearts sort of took over once the war started.

I can only imagine how much they have continued to move over the last week. This was about two weeks ago. As of last week, Canadians still remain split. Mr. Graham was right about some very divisive issues in Canada. We are very polarized. Twelve who support the United States and its ally's military action and 48 percent who oppose the action.

When we ask the question now that we have gone into the situation, "Do you think Canada should offer help," there was a 51/46 split. What is interesting is that not all of Canada is split this way. This is very much a factor of 80 percent in Quebec who do not support the war. What we are seeing is that Ontario and Alberta are much more pro-U.S. on this file.

THE ECONOMY AND PERSONAL SECURITY

I am going to shift to look at sort of current views of the economy. Canadians are about as optimistic with the economy as they have been in the last decade. You can see that one in ten say that we are in a period of strong growth. Six in ten say we are in moderate or slow growth. Seventy-two percent of Canadians describe the Canadian economy as very good. More than three-quarters say it is going to stay the same or improve, which is great given the buoyancy it is at now. Ninety percent say their personal prospects will improve and only ten percent say they will get worse.

These numbers deal with job anxiety. Thirteen percent reported that they believe someone in their household may lose their job. This is at a historic low. Going back to December, this is from a study we did of Canadian CEO's. It pretty much echoes those same strong sentiments. Only five percent said the economy will enter into a recession over the next year and a half.

Going back to the fall of 2001. This is an open-ended question we asked. What do you think the biggest impact of September 11th will be in the next six months? Fifty-five percent of Canadians said it is going to have negative impact on our economy and on job loss. That was the biggest factor they were worried about. Less than ten percent said stress and anxiety, less travel, or a range of other factors. Clearly, they looked at this through an economic lens. This does not mean they were not concerned about their safety and security or that terrorism was not on the radar screen, but for Canadians it was very much an economic imperative.

We also asked a forced choice question around the same set of issues, not knowing what the open-ended would give us. We put out 14 hypotheses. Would it be about the economy, would it be about sort of a lessening of Canada's tolerance to visible minorities in the multicultural side, or would it center on Canadian involvement and Canadian response post 9-11? This was done in November. The question was, "If Canadians had aligned themselves with the U.S. would it lead to similar attacks in Canada?" We still found that the majority said, even when prompted other ideas, that it would have a negative impact on our economy. That would be our biggest concern. Twenty-eight percent said they were worried about less tolerance. Only two in ten said they were actually worried that we may see similar attacks in Canada.

This next section is a segmentation of Canadians' attitudes post 9-11. Obviously, this study was done for a number of government clients. The axes works from left to right. To the left side of the chart we have those who are not concerned about safety, security, and the threat of terrorism. On the right side of the chart are those who were more concerned about safety, security, and the threat of terrorism. Up towards the top of the chart are those people

who were positive on government views and how they handled it two months in and to the bottom of the chart are those who were negative.

We have basically group people by attitudes. I will not go into the long explanation of what a cluster analysis is, but essentially if you took a room full of Canadians and got them to debate the issues, you would find that birds of a feather flock together. They would group much like boys and girls split in a high school gym; into pockets of like-minded people.

The pockets that split up in our gym are a group we have called relaxed cosmopolitans. They are not concerned about safety and security issues and feel that the government has done a pretty good job. Then we have the cynically disengaged. They would not like anything the government did, really were not concerned about terrorism or security issues, but felt government is very ineffective and could not get anything right anyway. That is where they are coming from. There were also three groups in the upper right section of the chart. Nineteen percent said it is all economic focus. We labeled the group that was not necessarily worried about their own personal safety, but felt there were efforts to be made even though they thought the government had done a pretty good job anxious supporters. There were 22 percent who were frightened. This group probably started stockpiling water and canned food. They were very concerned about their personal safety. I will just go through really quickly a little description of each of them.

Relaxed Cosmopolitans

The relaxed cosmopolitans showed the lowest levels of concern about their safety and security issues. They did not think Canada would ever experience a terrorist attack and were least likely to feel that Canada is unprepared or that Canada should tighten its borders; very much a laissez-faire attitude. Their thinking was that this is the way of the world, but we are not going to be attacked, so do not worry about it.

Cynically Disengaged

The cynically disengaged thought Canada was unprepared, but balanced this against the fact that they think the government is unprepared everywhere on all files. They are not particularly concerned about their personal safety and are among the least likely to feel safe today. There is a core out there who just dislike everything the government does on any files. It showed up in this segmentation, as well.

Economic Focused

These people were very driven by what is going to happen to jobs if we shut the border. They were the ones who were probably the loudest. If you notice, they tend to be over represented in the two provinces that have strong economies, Ontario and Alberta. The worried showed high levels of fear second only to the frightened. However, they do not feel that Canada is unprepared. They generally felt the government had done a pretty good job responding to the sort of short-term issues around the file.

Frightened

By far this group was the most concerned about safety and security. They said they were less safe than they were a year ago. This group is the most likely to think that Canada is unprepared and not ready for any terrorist attack in the country. We found they are the most likely to say that they would give up personal freedom and even Canadian sovereignty in the quest for stronger North American security. Their beliefs extend to the point where they were more suspicious of visible minorities and were supportive of racial profiling.

So how have we evolved or not evolved? Canadians, for the most part on the Canada-U.S. file, remain pretty divided. We asked if our close trade links with other countries make it difficult to insure our safety. We put this in because Canadians very much buy that we are a trading nation. We wanted to look at sort of how trade ties into security. We were split, with 38 percent agreeing and 39 percent disagreeing. Because we are a trading nation, it is going to be more difficult.

Eight in ten Canadians agree that Canada should tighten its borders to prevent terrorism. There was very little decline in this view between November of 2001 to March 2003. Though, as an initiative to prevent terrorism, we are very strong. However, when we talk about tightening our borders and following exactly the same U.S. policies to protect ourselves against terrorism, that 81 percent drops to 47 percent. They say, "I agree the best way to do this is to follow the same systems as the U.S."

Tighter borders are good. Following the U.S. is not so good. A northern perimeter is probably really bad. Even if they all mean the same thing to some people, the semantics around some of this is very volatile for Canadians. Half agree that a harmonized border will protect the Canadian economy and 31 percent disagree. There has been very fairly little shift in this position post 9-11. It has been fairly stable view despite what has happened in the past couple months with the wrap-up towards Iraq. Almost half agree that the harmonization of the U.S. will erode Canadian values. So while we see the benefits on security and the economy, there is a classic

ability of Canadians to hold more than one set of attitudes at the same time. We are also very concerned that as we harmonize, we will start to see an erosion of Canadian values. We are also equally likely to believe that getting a closer relationship with the U.S. might actually make us a terrorist target.

As you can see there are a lot of contradictory views from Canadians. Equal numbers agree and disagree that they would give up Canadian sovereignty to increase North American security. That number has actually dropped a little bit from 47 percent in November of 2001 at the heightened level down to 42 percent now. However, it is still fairly strong with 45 percent disagreeing.

On the issue of Canadian sovereignty. As it has been said a couple of times this morning, it is very important to Canadians to actually have sovereignty. More than four in ten Canadians are on the side that says it is so important, I would guard all Canadian sovereignty for it. I think this shows the strength and some of the concerns.

When you go back to August 2001, you can see that there are some more significant drop-offs. When we said these were goals the Government of Canada could pursue, eighty percent of Canadians said we should pursue more economic links with the U.S. Canadians by a two to one margin say that the U.S. is our most important ally and most important trading partner. The majority of Canadians say that the two to one current arrangement is either close enough or not close enough. Only two in ten say it is too close and believe we should distance ourselves. This decline is more than likely a result of September 11th. I would imagine the numbers have dropped a little bit since then. Support for an open border between Canada and the U.S. has also declined since August. It has dropped from 62 to 57 percent.

What is interesting about the Canada-U.S. relationship from a polling perspective is that the more you define it, the narrower you get. The more specific you get in saying what about these specific options, the lower the support goes. So in a broad principle, we actually do want to work quite closely with the U.S. However, when you get into issues like common currency or any of the specifics, we start to see declines against the specifics as people start to look at how these concepts might be implemented and how it could impact them.

CONCLUSION

Canadian support for the U.S. led coalition in Iraq had been climbing, but the issue is very volatile. Eighty-eight percent of Canadians say they are watching it at least somewhat closely. It is obviously very polarized. As things have gone well, Canadians have jumped on the bandwagon. If things had gone the other way, I am not sure we would not have seen ten point declines in favor of the Canadians' position to sit out the war.

They understand the importance of the U.S. both as an economic partner in terms of neighbors and allies, and there is some angst in the public mindset about where we want to see ourselves in that relationship. They did not feel their safety or security was threatened, but they are willing to make changes to North American Security because they understand there is an economic imperative there because of the U.S. focus on those issues. While moving forward, Canadians favor closer economic ties. The U.S.-Canada border really is the common link whether Canadians are concerned about safety and security issues or economic issues. It is the one thing for very different reasons that the polls and Canadians agree that we need to do something on that front. Thanks.