

THE MOOD OF CANADA: GOVERNMENT PERFORMANCE RATINGS STABLE; PERCEPTION OF RIGHT DIRECTION MOVES UP



Nik Nanos

In his third annual Mood of Canada survey for *Policy Options*, pollster Nik Nanos finds that the mood of Canadians has improved significantly over a year ago, when the country was plunged into a recession after the crash of the stock market. He also finds that most Canadians don't think relations between their federal and provincial governments have improved, in spite of governments working closely together on economic recovery and H1N1 vaccine distribution. Finally, two Canadians in three give the Harper government a passing grade in its performance over the last year.

Selon ce troisième sondage annuel sur l'« humeur du Canada » réalisé par Nik Nanos pour *Options politiques*, les Canadiens sont de bien meilleure humeur qu'à la même période l'an dernier, quand le pays était plongé dans la récession consécutive à l'effondrement des marchés boursiers. Par ailleurs, notre sondage montre que les Canadiens n'ont observé aucune amélioration des relations entre Ottawa et leur gouvernement provincial, même les provinces ont collaboré aux mesures de reprise économique et à la campagne de vaccination contre la grippe A(H1N1). Enfin, deux Canadiens sur trois accordent la note de passage à la performance du gouvernement Harper au cours de l'année qui se termine.

Nearly two Canadians in three, 64.3 percent, think the country is moving in the right direction, up from just over half, 53.6 percent, who thought so a year ago, after the stock market crashed and the country was plunged into the deepest recession since the Second World War.

This is the principal finding of our third annual Nanos — *Policy Options Mood of Canada* poll.

After plunging precipitously last year by 12.2 points from a 2007 high of 65.8 percent, the “right direction” numbers have returned to nearly the levels in our first Mood of Canada poll taken two years ago (question 1).

The “right direction” is a leading indicator of the public's mood. A year ago, Canadians were clearly caught up in the anxiety of the global financial meltdown. They were worried about their investments, their savings, their livelihoods and their future.

In each of the three years of the *Mood of Canada* survey, Nanos Research has been in the field during the first part of November. Each year, we've asked the identical questions. This year Nanos interviewed 1,005 Canadians randomly by

telephone between November 7 and November 10. The margin of error is 3.1 percent, 19 times out of 20.

The “right direction” scores have virtually returned to 2007 levels, and “wrong direction” response is relatively the same, at 33.2 percent, as it was last year, at 32.1 percent, and much higher than in 2007, when it measured 20.2 percent.

The difference, of course, is that the “not sure” response has fallen sharply to 2.5 percent from 14.2 percent last year and 14.0 percent in 2007.

In other words, nearly all Canadians have an opinion or sense of whether the country is moving in the right or wrong direction. The “not sures” are, within the margin of error, virtually zero.

Regionally, the right direction numbers were stronger in the Prairies at 77.5 percent and weaker in Quebec at 48.8 percent. Conversely, the wrong direction numbers are stronger in Quebec at 41.1 percent, and weaker in the Prairies at 22.5 percent. Nearly twice as many Quebecers think the country is moving in the wrong direction as do Canadians living on the Prairies. To a certain degree, the

wrong direction numbers in Quebec may capture the negative sentiment about Canada among pro-sovereignty voters.

We see this underlying pro-sovereignty sentiment in our next question: “on a scale of 1 to 5, where 1 is not improved and 5 is improved, how

were in the middle of the scale. Altogether, 68.8 percent, two British Columbians in three, thought inter-governmental relations weren’t improving or were indifferent in their response.

In Ontario, 13.2 percent said relations had definitely not improved, while another 18.4 per-

Once again, the “not improved” numbers were highest in Quebec, again reflecting likely latent sentiment among sovereignists. For example, 16 percent of Quebecers thought the country’s reputation had not improved, while 15.5 percent were in the second lowest point on the scale.

By comparison, only 7.8 percent of Ontarians thought Canada’s reputation had not improved, while another 12.4 percent were in the second lowest category.

Finally, we asked Canadians, on a 5-point scale of “very good” to “very poor,” to “describe

the performance of the current federal Conservative government led by Prime Minister Stephen Harper” (question 4).

This is the Prime Minister’s basic management score, and his score is stable over the past two years. While only 6.8 percent said it was “very good,” another 26.3 percent said it was “somewhat good,” and a further 35.8 percent said it was “average.” In other words, two Canadians in three, 68.9 percent, give the government and PM a passing grade. These

Only one Quebecer in 10 thought relations between the two levels of government had improved over the last year, in spite of the federal and provincial governments working closely together on infrastructure and economic recovery programs, as well as managing the supply and demand of the H1N1 vaccine, a highly visible issue at the very time we were in the field for this poll.

would you rate the relationship between the federal government and the provincial governments over the past year?” (question 2).

Once again, the lowest approval numbers were in Quebec, where 39.6 percent registered either a 1 (15.3 percent) or a 2 (24.3 percent) on a five point scale. Only 3 percent of Quebecers said federal-provincial relations had improved over the last year, while another 7.4 percent said they were somewhat improved (a rating of 4).

Only one Quebecer in ten thought relations between the two levels of government had improved over the last year, in spite of the federal and provincial governments working

closely together on infrastructure and economic recovery programs, as well as managing the supply and demand of the H1N1 vaccine, an issue that was highly visible at the very time we were in the field for this poll.

But Quebec was not alone among the regions in registering a high negative response rate to this question, far from it.

In British Columbia, the “not improved” response was the highest in the country at 18.1 percent, while another 17.5 percent were in the second lowest field, and another 33.2 percent

cent were at the second lowest point on the five point scale. Another 43.8 fell into to the middle point of relative indifference. In the Atlantic and Prairie provinces the “not improved” scores were significantly lower than the rest of the country, perhaps reflecting the traditional role of government programs in the Atlantic region and the enduring prosperity in the Prairie provinces.

When asked to rate “Canada’s reputation around the world over the last year” on the same scale (question 3), the responses were relatively sta-

Two Canadians in three, 68.9 percent, give the government and PM a passing grade. These numbers are virtually identical to those of a year ago.

ble compared to last year, though not as positive as in 2007.

Overall, 8.5 percent of Canadians thought our international reputation had improved over the last year, while 31.2 percent thought it had somewhat improved, and another 31.5 percent fell in the middle of the 5-point scale.

Only 9.6 percent of Canadians think the country’s reputation has definitely not improved while another 13.0 fell into the second lowest category.

numbers are virtually identical to those of a year ago.

Based on “the right direction” and the approval rating for his government, the Mood of Canada at the end of 2009 is generally stable for Stephen Harper and his government.

Contributing Writer Nik Nanos is president and CEO of Nanos Research, a national public opinion research firm based in Ottawa. He is also research associate professor at the State University of New York (SUNY) in Buffalo.

The Mood of Canada: government performance ratings stable; perception of right direction moves up

QUESTION 1. WOULD YOU SAY THAT CANADA AS A COUNTRY IS MOVING IN THE RIGHT DIRECTION OR THE WRONG DIRECTION?

		Total N	Right direction %	Wrong direction %	Unsure %
Region	Canada 2009/11	1,005	64.3	33.2	2.5
	Canada 2008/11	1,000	53.6	32.1	14.2
	Canada 2007/11	1,004	65.8	20.2	14.0
	Atlantic	100	71.8	28.2	0.0
	Quebec	254	48.8	41.1	10.0
	Ontario	302	66.7	33.3	0.0
	Prairies	201	77.5	22.5	0.0
	British Columbia	149	62.9	37.1	0.0
Gender	Male	508	65.5	32.6	1.8
	Female	498	63.0	33.8	3.3
Age	18 to 29	198	65.9	33.3	0.7
	30 to 39	193	64.3	33.3	2.4
	40 to 49	217	62.9	35.0	2.0
	50 to 59	172	61.5	35.4	3.1
	60 plus	225	66.2	29.5	4.3
Home	Own	731	66.5	31.2	2.3
	Rent	234	58.4	38.8	2.8
	Refused	40	58.3	36.9	4.8
Vote profile	Liberal	235	67.2	30.0	2.8
	Conservative Party	310	80.1	18.4	1.5
	NDP	146	50.8	47.9	1.3
	Bloc Québécois	76	40.1	52.7	7.3
	Green Party	48	46.6	53.4	0.0
	Undecided	191	59.4	37.0	3.6

QUESTION 2. ON A SCALE OF 1 TO 5, WHERE 1 IS NOT IMPROVED AND 5 IS IMPROVED, HOW WOULD YOU RATE THE RELATIONSHIP BETWEEN THE FEDERAL GOVERNMENT AND THE PROVINCIAL GOVERNMENTS OVER THE PAST YEAR?

		Total N	1 = not improved %	2 %	3 %	4 %	5 = Improved %	Unsure/ undecided %
Region	Canada 2009/11	1,005	13.8	18.6	43.3	8.7	3.7	12.0
	Canada 2008/11	1,000	13.3	18.7	42.7	11.7	4.8	8.8
	Canada 2007/11	1,004	13.5	19.5	43.2	11.9	4.4	7.5
	Atlantic	100	10.6	20.4	44.1	10.4	6.2	8.3
	Quebec	254	15.3	24.3	45.8	7.4	3.0	4.2
	Ontario	302	13.2	18.4	43.8	7.6	3.8	13.2
	Prairies	201	11.0	11.5	46.5	10.3	3.9	16.7
	BC	149	18.1	17.5	33.2	9.8	2.7	18.7
Gender	Male	508	12.8	19.4	41.4	9.2	4.3	13.0
	Female	498	14.8	17.7	45.3	8.2	3.1	10.9
Age	18 to 29	198	10.4	19.3	42.2	7.4	2.2	18.5
	30 to 39	193	11.9	16.1	42.9	9.5	3.0	16.7
	40 to 49	217	15.2	20.8	42.6	8.6	2.5	10.2
	50 to 59	172	19.0	19.0	44.7	8.4	3.5	5.3
	60 plus	225	12.9	17.6	44.2	9.4	6.8	9.0
Home	Own	731	13.7	18.4	43.7	9.1	4.1	11.0
	Rent	234	15.1	19.6	42.1	8.4	2.1	12.8
	Refused	40	7.3	15.8	44.4	2.9	5.7	23.9
Vote profile	Liberal	235	13.6	21.5	46.4	10.7	2.8	4.9
	Conservative	310	7.9	16.1	51.9	11.5	3.9	8.6
	NDP	146	18.7	20.0	37.2	5.5	5.5	13.0
	Bloc	76	27.7	27.1	38.6	4.7	1.9	.0
	Green	48	11.6	15.7	48.6	12.3	1.7	10.1
	Undecided	191	14.7	15.3	30.8	4.7	4.3	30.4

QUESTION 3. ON A SCALE OF 1 TO 5, WHERE 1 IS NOT IMPROVED AND 5 IS IMPROVED, HOW WOULD YOU RATE CANADA'S REPUTATION AROUND THE WORLD OVER THE PAST YEAR?

		Total N	1 = not improved %	2 %	3 %	4 %	5 = improved %	Unsure/ undecided %
Region	Canada 2009/11	1,005	9.6	13.0	31.5	31.2	8.5	6.2
	Canada 2008/11	1,000	9.6	14.6	31.1	29.4	12.4	2.8
	Canada 2007/11	1,004	7.6	11.2	30.8	33.2	15.1	2.0
	Atlantic	100	4.9	14.5	38.6	30.3	7.1	4.6
	Quebec	254	16.0	15.5	31.2	26.6	7.3	3.3
	Ontario	302	7.8	12.4	30.3	35.6	7.1	6.8
	Prairies	201	3.8	10.3	33.2	32.6	10.6	9.5
	BC	149	13.6	12.8	27.1	28.5	11.7	6.4
Gender	Male	508	10.9	12.4	29.4	31.7	9.0	6.6
	Female	498	8.3	13.7	33.6	30.6	8.1	5.7
Age	18 to 29	198	9.6	12.6	30.4	32.6	5.9	8.9
	30 to 39	193	14.9	14.3	27.4	28.6	6.5	8.3
	40 to 49	217	7.1	13.7	33.5	34.5	7.6	3.6
	50 to 59	172	10.6	13.7	34.5	26.5	11.1	3.5
	60 plus	225	6.8	11.2	31.7	32.4	11.5	6.5
Home	Own	731	8.4	13.0	32.9	32.7	7.2	5.7
	Rent	234	14.8	14.2	26.4	25.9	13.0	5.8
	Refused	40	2.9	6.5	34.2	33.2	6.4	16.8
Vote profile	Liberal	235	9.6	8.0	37.7	35.6	5.2	3.9
	Conservative	310	3.9	8.8	30.4	39.2	12.7	4.9
	NDP	146	14.1	23.7	32.4	20.1	5.9	3.7
	Bloc	76	20.9	25.6	24.3	20.8	8.4	0.0
	Green	48	14.6	13.3	37.0	19.4	8.6	7.1
	Undecided	191	9.8	12.8	26.2	28.2	7.9	15.1

QUESTION 4. WOULD YOU DESCRIBE THE PERFORMANCE OF THE CURRENT FEDERAL CONSERVATIVE GOVERNMENT LED BY PRIME MINISTER STEPHEN HARPER AS VERY GOOD, SOMEWHAT GOOD, AVERAGE, SOMEWHAT POOR OR VERY POOR?

		Total N	Very good %	Somewhat good %	Average %	Somewhat poor %	Very poor %	Unsure/ Undecided %
Region	Canada 2009/11	1,005	6.8	26.3	35.8	15.5	9.7	5.9
	Canada 2008/11	1,000	6.3	26.1	34.9	16.5	13.4	2.7
	Canada 2007/11	1,004	10.1	29.4	38.1	9.0	9.4	4.1
	Atlantic	100	4.6	27.0	39.0	17.0	7.8	4.6
	Quebec	254	1.3	21.2	38.4	24.8	11.7	2.5
	Ontario	302	9.7	25.5	35.3	11.8	10.0	7.7
	Prairies	201	10.8	33.6	33.5	10.0	4.5	7.6
	BC	149	6.0	25.9	33.5	13.7	14.2	6.8
Gender	Male	508	7.1	28.8	32.1	16.6	9.6	5.9
	Female	498	6.4	23.7	39.6	14.5	9.9	5.9
Age	18 to 29	198	6.7	20.0	36.3	17.0	11.1	8.9
	30 to 39	193	5.4	27.4	31.0	18.5	11.9	6.0
	40 to 49	217	5.1	23.4	39.6	17.3	6.6	8.1
	50 to 59	172	6.2	27.4	37.6	15.5	11.1	2.2
	60 plus	225	10.1	32.7	34.5	10.1	8.6	4.0
Home	Own	731	7.0	29.0	34.7	14.6	9.3	5.4
	Rent	234	7.2	18.7	40.0	18.4	10.7	4.9
	Refused	40	0.0	19.7	31.9	16.7	11.2	20.5
Vote profile	Liberal	235	5.6	19.5	46.9	18.5	8.7	1.0
	Conservative	310	12.8	44.3	32.1	4.4	3.3	3.1
	NDP	146	1.3	14.5	42.4	24.6	16.5	0.8
	Bloc	76	0.0	10.7	33.5	43.1	12.7	0.0
	Green	48	4.7	16.1	32.2	24.4	20.9	1.7
	Undecided	191	5.8	23.1	25.0	9.9	12.3	23.9



NANOS

trusted insight and strategy

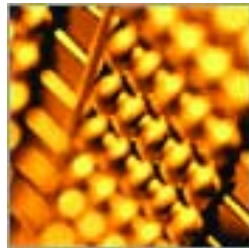
NANOS RESEARCH GROUP

Ottawa • Toronto • Montreal • Calgary • Vancouver • Halifax • Buffalo



The Nanos Approach

At Nanos Research, we are experts at helping public-facing companies and organizations connect with the “hearts and minds” of customers or the general public. Our advantage comes from over 20 years experience in understanding the numbers and building upon them to provide strategic insight and intelligence in support of our clients’ business, marketing, public affairs and communications needs.



Getting Started

At Nanos, we believe that small steps can lead to large insights. We are regularly in the field with a national omnibus surveys. We’ll sit down with you to learn about your challenges and work on your challenge together. The results can be used to conduct a www.justasonmi.com basis of a broader mission plan for you to achieve your market or mind share objectives.

The Right Solution for the Right Job

- Strategy Retainer
- Strategic Assessment
- Telephone Surveys
- Online Surveys
- eDeliberative Polling and Online Dialogue
- Focus Groups
- Elite in-depth interviews
- Mystery Shopping
- Management Consulting



A Trusted Source

Our team is headed by Nik Nanos, a leader in the market and public opinion research industry recognized for the quality of his work, the insightfulness of his counsel and his professional integrity. Media organizations regularly call upon Nik Nanos and Nanos Research to capture the public pulse and analyze complex issues.



The Nanos Research Group

Our group of companies is a national team of like-minded research professionals and organizations bound by a common commitment to quality research, quality service and superior research outcomes.



www.jenkinsresearch.ca



www.thinkwellresearch.ca



www.justasonmi.com



www.zincresearch.com



www.tsp.ca

Contact us today for your next research or strategy project.

John Nanos, Senior Vice President
North America Toll-free 1(888) 737-5505 ext.223
(416) 493-1965 ext. 223
jnanos@nanosresearch.com