



Ipsos Reid



Closing The Leadership

Gap in Canada



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Nobody's Unpredictable

- 1. Canada's New Face**
- 2. The New Canadian Mindset**
- 3. Our Next National Unity Battle**
- 4. Canadians and Health Care**
- 5. Leadership Challenges**

Canada's New Face





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

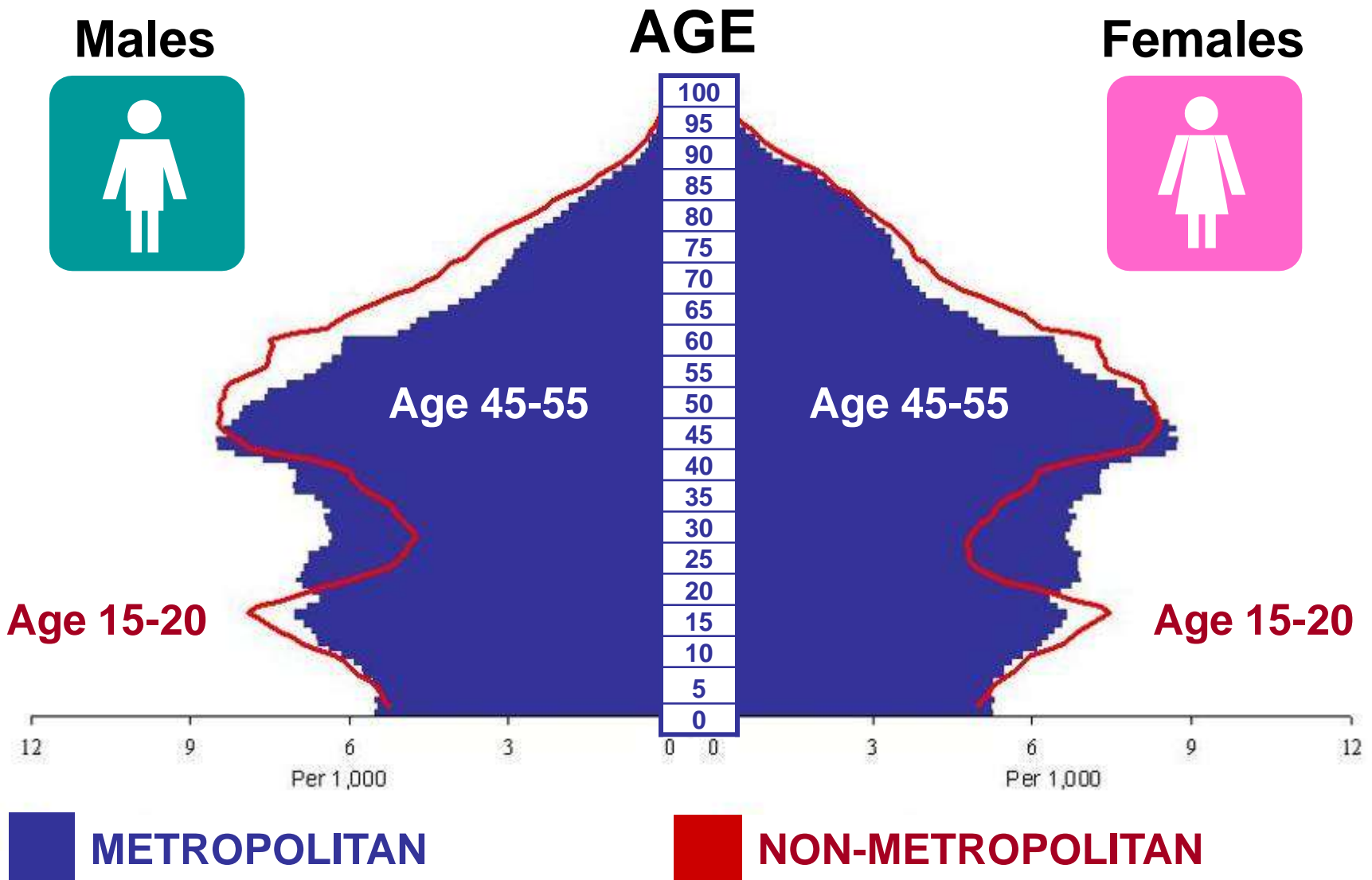
By 2015
Seniors Will
Outnumber
Children



Urban Nation

We've
Become An
Urban
Nation







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

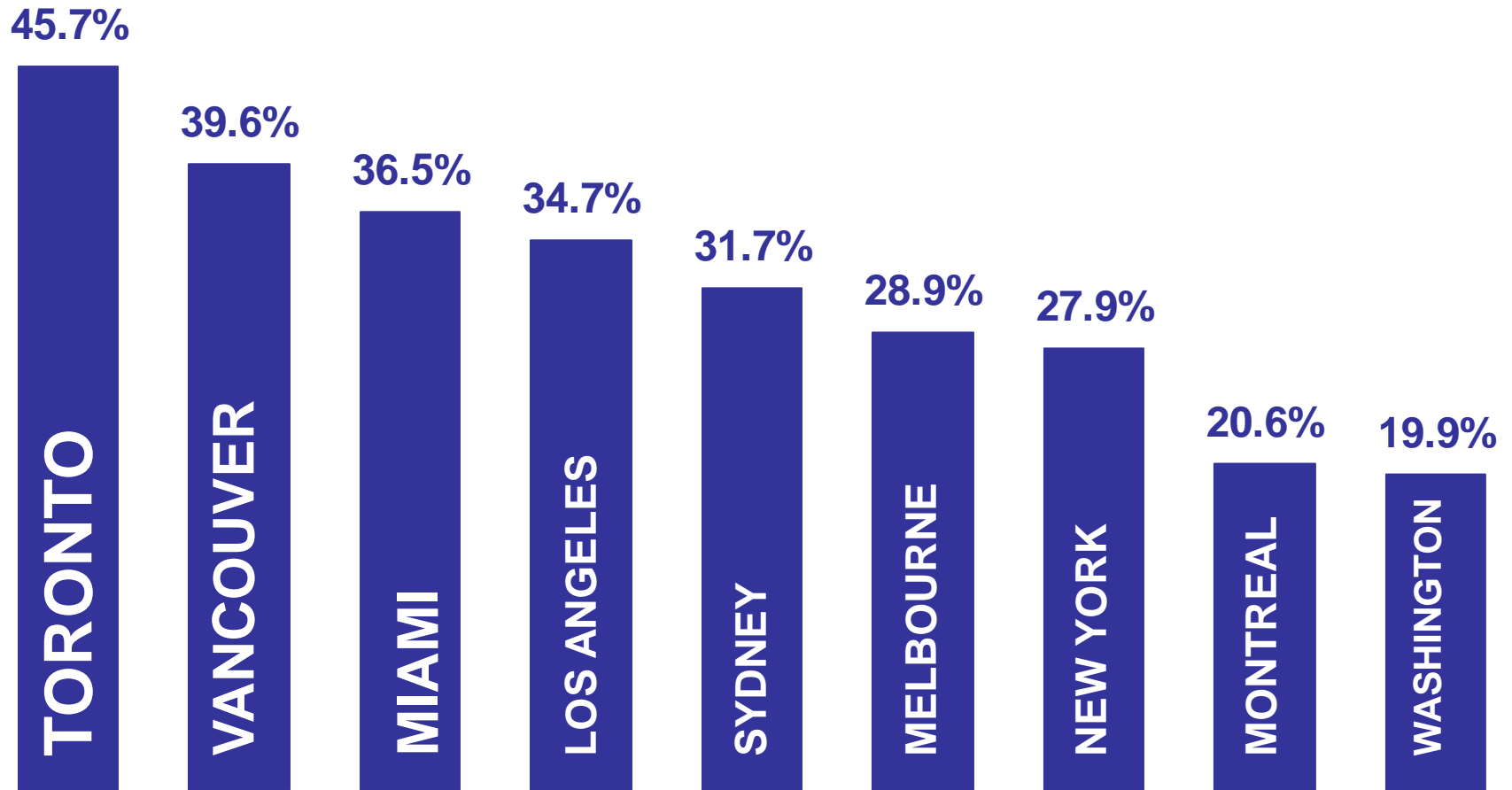
Iran

UK

Colombia



As a Percentage of **City Population**





Employment

Female employment rate has nearly doubled



Education

Educational attainment has increased



Trade

The importance of trade in our economy has quadrupled



Government

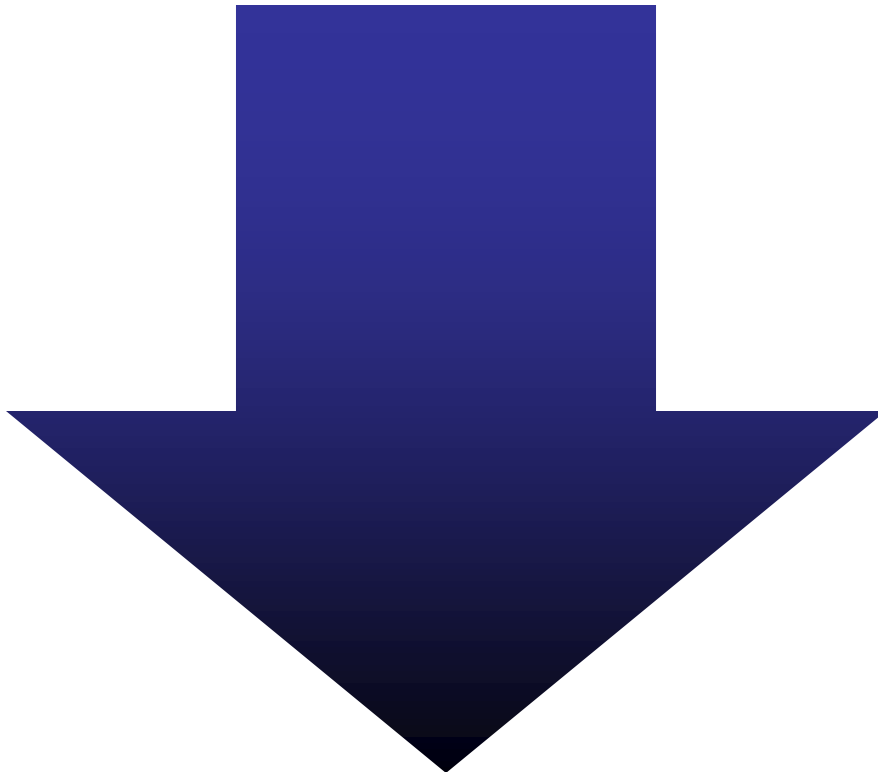
Government a bigger share of our economy - taking 25% more of our money, but redistributing more too



2. THE NEW CANADIAN MINDSET



The Decline In Public Trust



The Rise Of The Knowledge Citizen / Consumer



[//http://www.CERTAINTY](http://www.CERTAINTY)



3. Our Next National Unity Battle





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



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

4. Canadians and Health Care



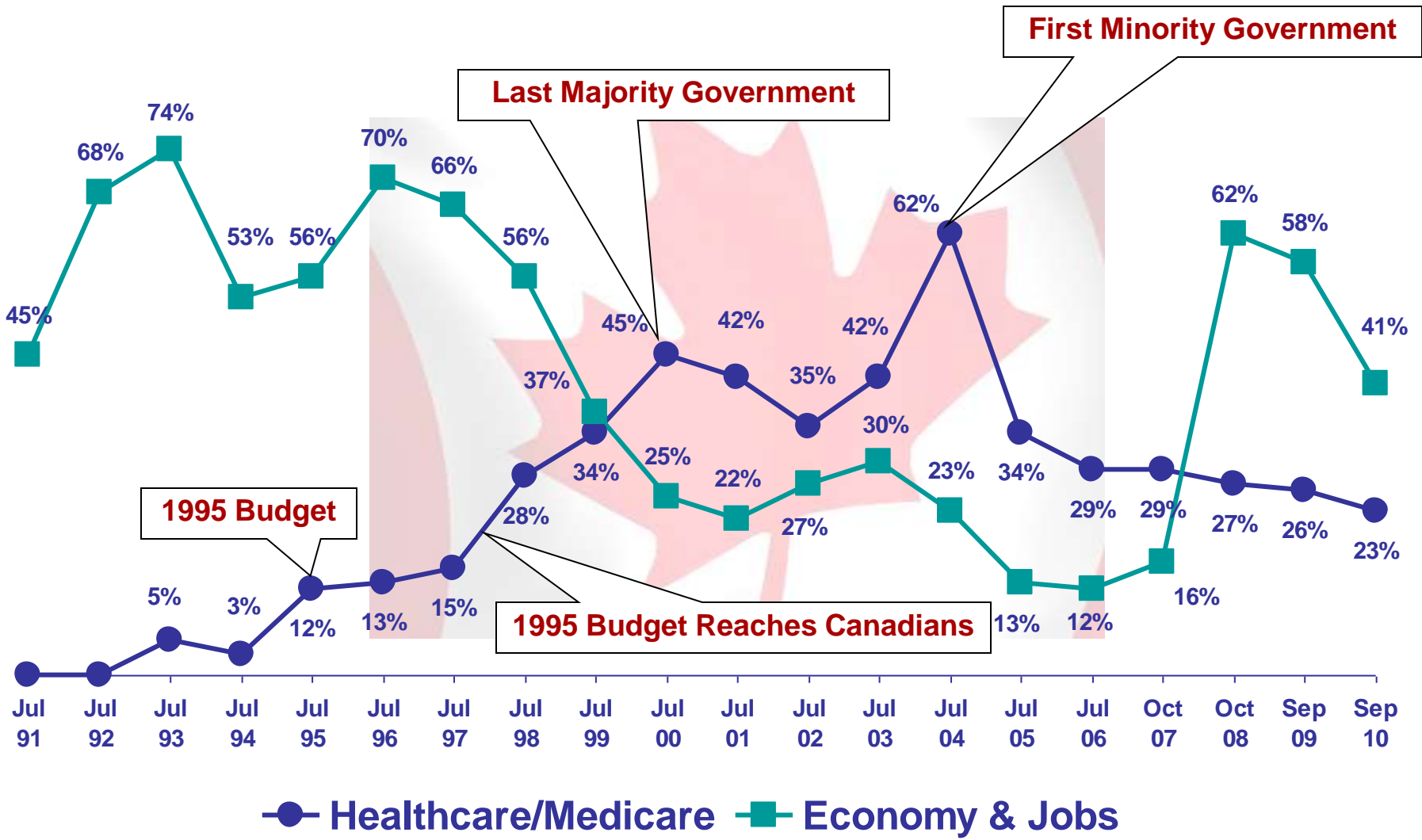
- **As The Economy Improves...**
concern over health care will increase and it will *once again become a fixture on the public and political agenda.*



WHY?

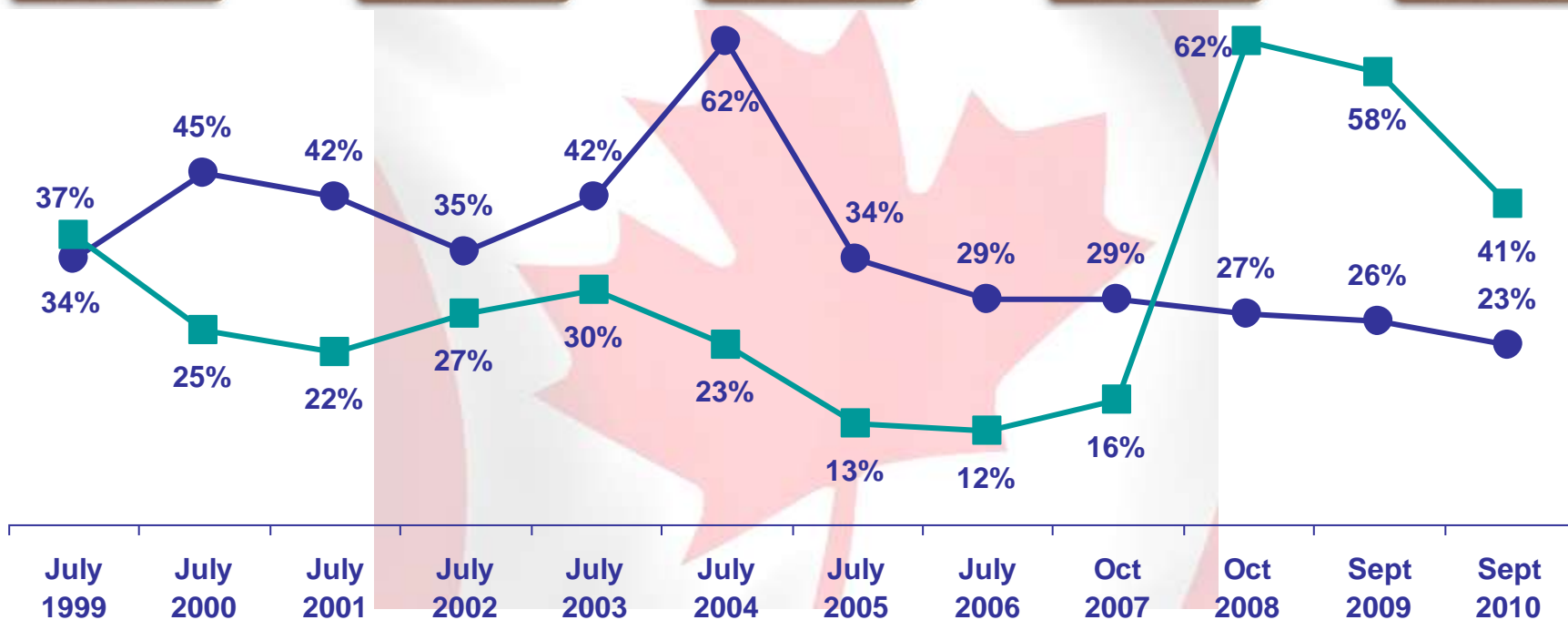


- On on-going debate around the world.
- An ageing population with high expectations for quality of life.
- A political window that will see the last Federal-Provincial funding agreement come to an end.
- A population that views health care as part of its national identity.
- A system that is increasingly taking up a greater portion of government revenues and whose sustainability is in question.



Thinking of the issues presently facing Canada, which one do you feel should receive the greatest attention from Canada's leaders?

The Evolution of the Health Care Debate

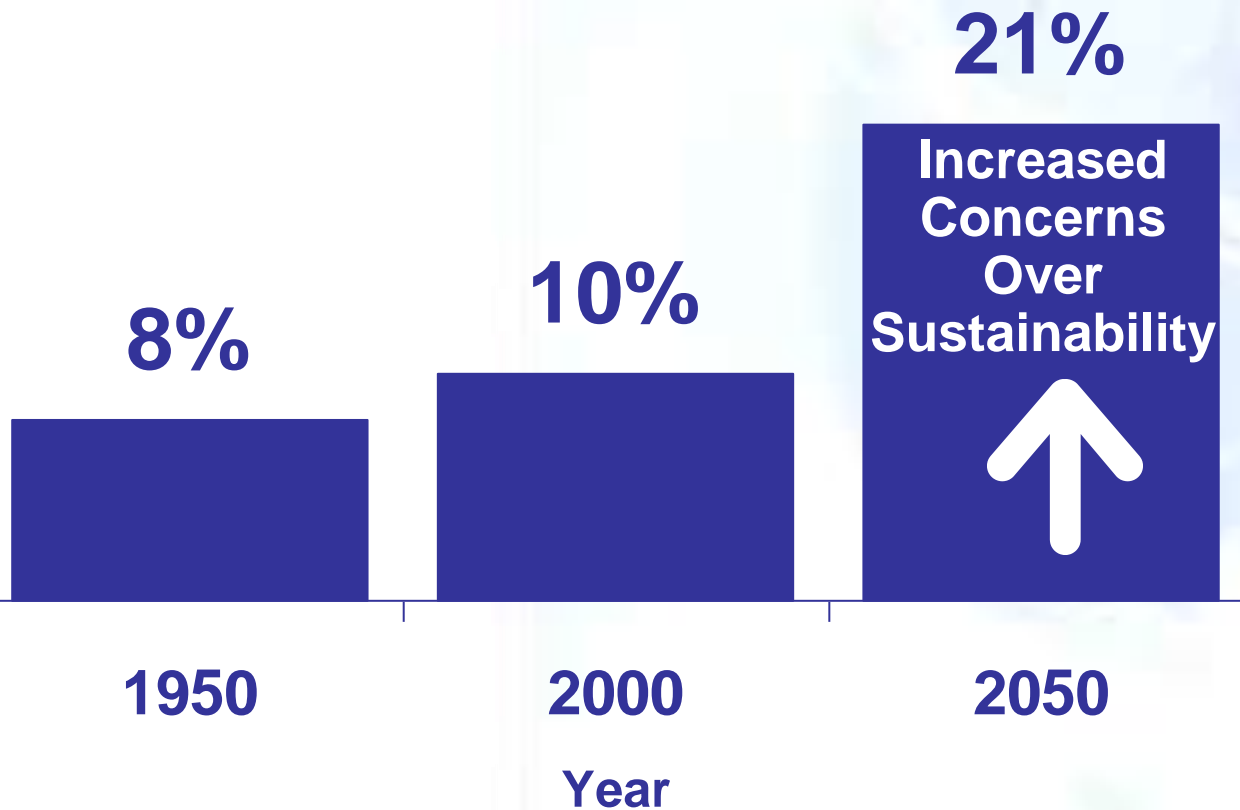


● Healthcare/Medicare ■ Economy & Jobs

Thinking of the issues presently facing Canada, which one do you feel should receive the greatest attention from Canada's leaders?

- **Ageing**
- **Higher Cost / Fiscal Challenges**
- **Recognition of The Need For Change**
- **Increased Concerns Over Sustainability**
- **A Thirst For Information & Knowledge**
- **A Strong Desire to Be Engaged in the Change Process**

% of World Population **60** Years or Older



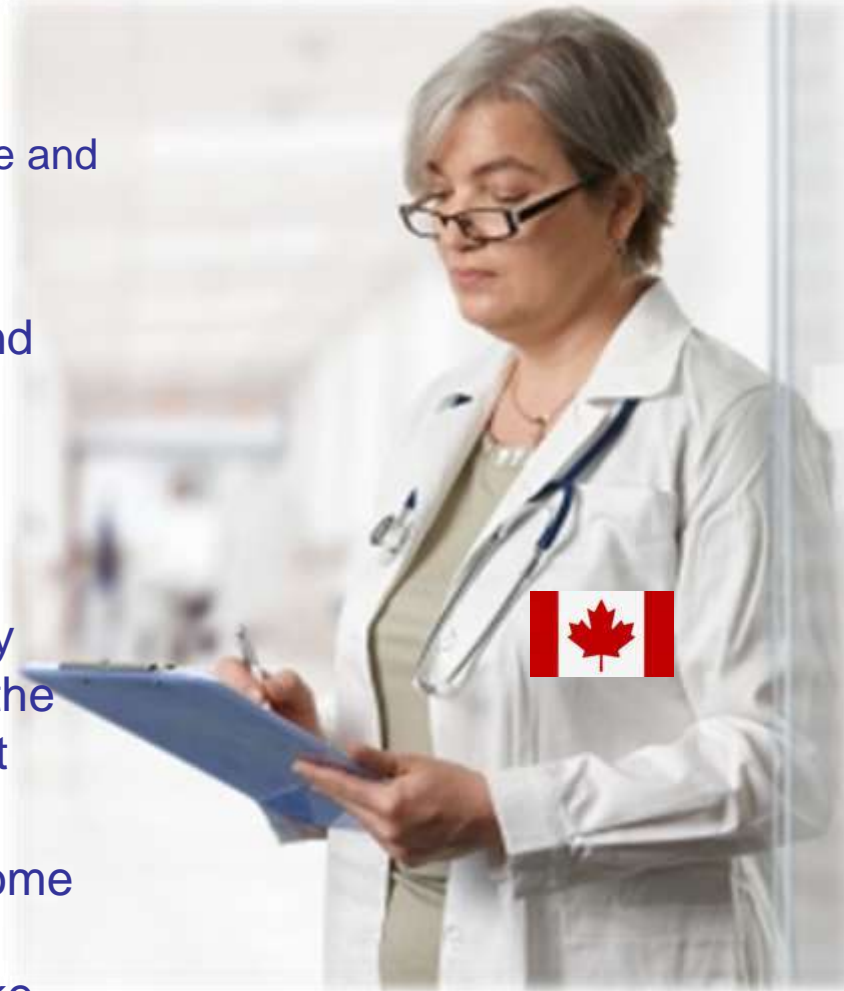
→ Due to:

- a. Rising HealthCare Costs
- b. Impact Of Global Downturn



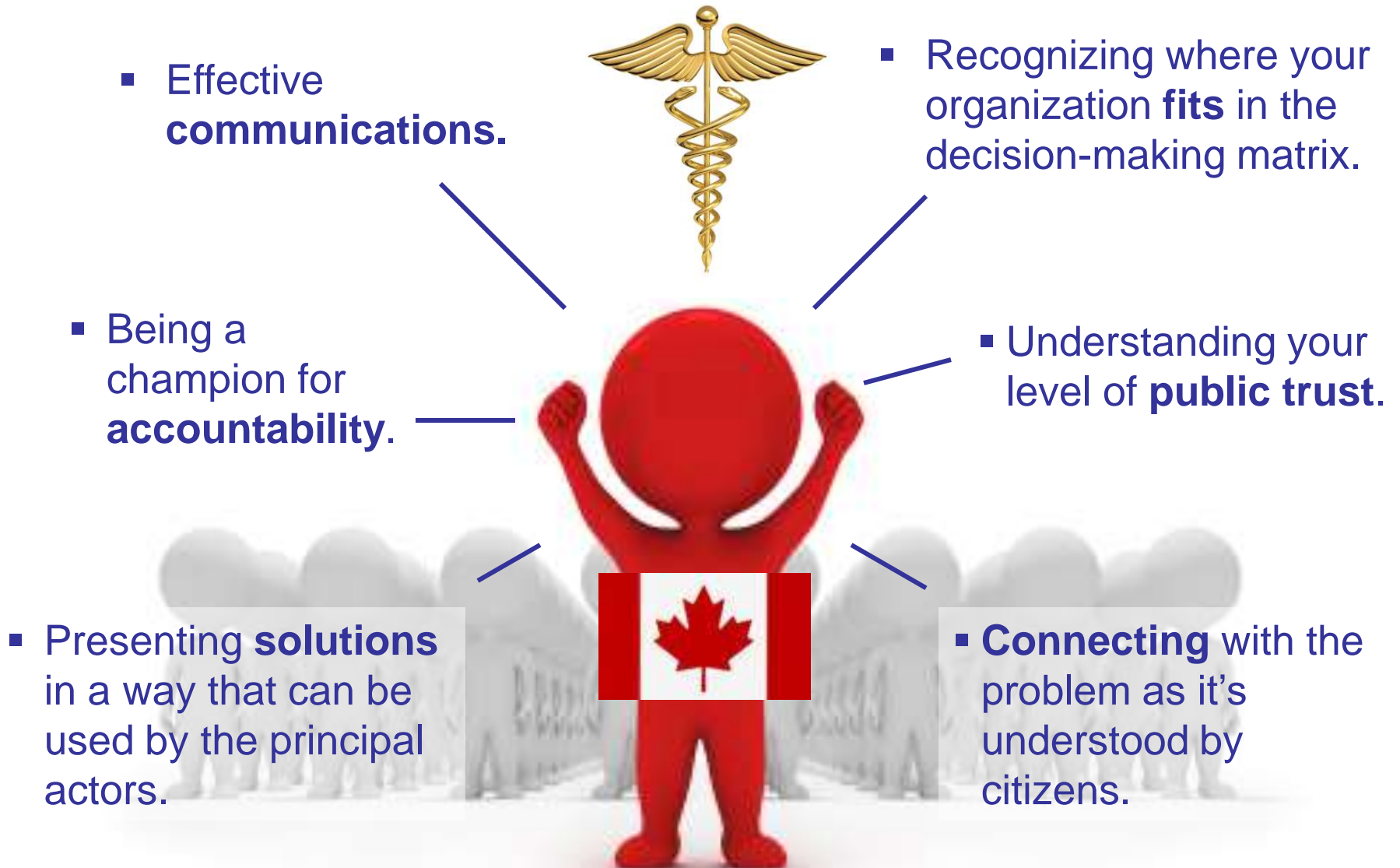
Source: UN Department of Economic and Social Affairs, World Population Ageing 1950-2050, (2002), <http://www.un.org/esa/population/publications/worldageing19502050/>

1. **Wait times and access** are at the key concerns (quality and outcomes will emerge later).
2. **Affordability** (what can we pay for) and **sustainability** (what services can we preserve and maintain into the future) will be come cornerstones of the debate.
3. Canadians are still tired of past debates and somewhat resigned that wait times are the costs we pay for universality – but this will reach a *tipping point* and then we will see:
 - A public push to better evaluate the system; give them the information they need to make decisions and to make the system focused on patient needs/want rather than structure/finances.
 - At the same time there will likely be some rationalization and a need to engage Canadians and work with them to make decisions.



5. Conclusion: Leadership Challenges







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