

2006 • 2007

PART OF THE SECURITY MONITOR STUDY



EKOS

Wave 3:

Segmentation of the  
Canadian Public



# Segmentation of the Canadian Public

Wave 3 of the **Security Monitor** 2006-7 Study



March 2007

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## Introduction

**E**KOS undertook multivariate analysis of recent Security Monitor findings with the objective of developing a typology of the Canadian public. The multivariate analysis was performed on the Wave 3 findings from January 2007. The methodological details of this analysis are shown in Appendix A of this report.

This report is intended to help clients better understand how the Canadian public divides into distinct types or groups based on underlying similarities, five of which were identified in the analysis of the most recent fieldwork. This is not the first time this type of exercise has been performed using findings from the Security Monitor. In the fall of 2005, a multivariate analysis also identified five segments, many of which bear a resemblance to the groups presented in this report. There have, however, been some important shifts in the security landscape that have affected the way in which the public segments into different groups. For example, events such as the arrest of terrorist suspects in Toronto has, for some, altered their perception of threat. Canada's perceived relationship with the United States has also shifted over the past 18 months, influencing how some view the future of this country.

The remainder of this report explores in detail the key differences in the demographics and attitudes across the five identified segments and as well as some of the messages that would be most effective from a communications perspective. A more detailed profile of some of the key differences of the various segments of the population is provided in Appendix B.



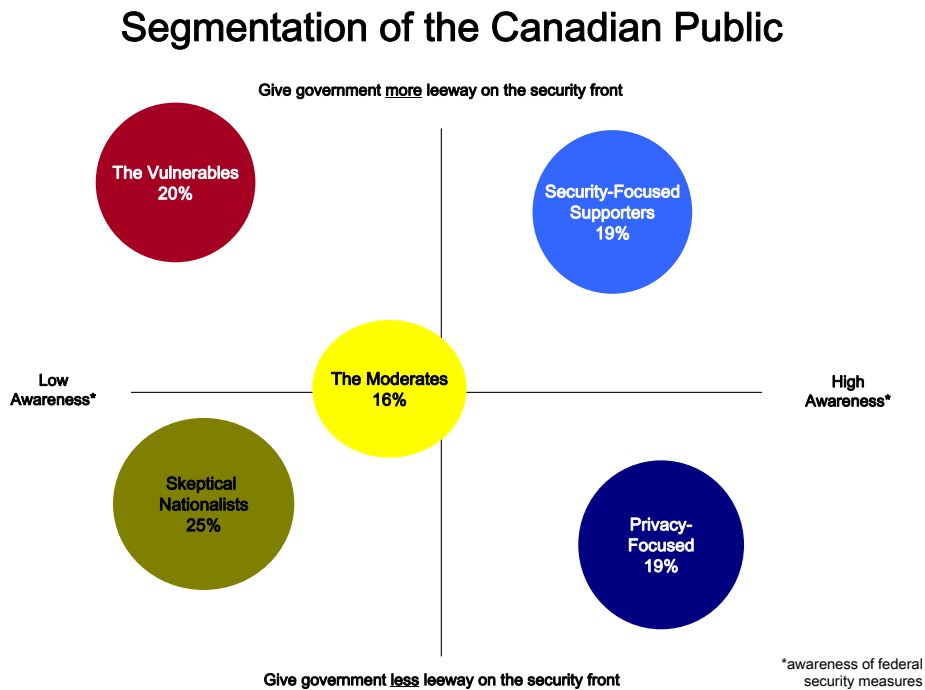


## Overview of the Segments

The five groups identified through the analysis compose the following proportions of the Canadian population aged 18 and over:

- Skeptical Nationalists 25 per cent of the public
- Security-Focused Supporters 19 per cent of the public
- The Vulnerables 20 per cent of the public
- The Moderates 16 per cent of the public
- Privacy-Focused 19 per cent of the public

As shown in the following chart, the segments have different levels of confidence/trust in the federal government's handling of the security file as well as engagement on these issues. As discussed later, these segments also differ from one another in terms of a variety of other indicators (e.g., concerns with rights, views on future directions for the country vis-à-vis the United States).







## Skeptical Nationalists

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## **Segment 1 – Skeptical Nationalists**

Representing the largest segment, the Skeptical Nationalists composes 25 per cent of the Canadian population.

### Key Features:

- Very low awareness of federal security measures (but educated and follow news)
- Low levels of trust and confidence in government
- Greater focus on civil liberties (e.g., wary of police and quasi-police agencies)
- Non-alarmists (e.g., modest concerns about terrorism)
- Strong affiliation with liberal values
- Nationalistic and staunchly anti-American

### Summary:

This group is the most critical of the way the current government is handling the security file (i.e. they are most likely to say “wrong direction”). They also express little confidence in the government’s ability to manage a variety of other related tasks (e.g., respond to a terrorist attack, weather-related disasters, or health crises). At the same time, however, they are among the least informed of the government’s security agenda (82 per cent report having “no awareness”).

Despite their self-reported lack of awareness, this segment perceives the government’s security response as being too aggressive: 1 in 5 say the government has moved “too quickly” and “gone too far”. This manifests in heightened concerns with civil liberties, which is exacerbated by their distrust of government (i.e. they are the least likely to trust the government to strike a balance between individual rights and security).

Their criticism of the current security focus may emanate from the fact that they do not feel threatened (i.e. they are least likely to think that a terrorist attack is imminent or that they or their family could be personally affected). As a result, this segment is least likely to see the need to enhance the role and powers of authority figures (e.g., 54 per cent oppose increasing police powers).

Another striking feature of this group is their strong anti-American views: they believe that Canada has become more like the United States (85 per cent) and are the most likely to say that they want Canada to be less like the U.S. in the future (90 per cent).

The Skeptical Nationalists segment is more likely to be composed of youth (42 per cent are younger than 34 years of age), educated individuals (42 per cent have a university education), Canadian citizens (90 per cent), Internet users (86 per cent), urban dwellers (82 per cent), and those who lean to liberal in their political ideology (35 per cent). Women are slightly over-represented in this segment.

#### Effective Messaging:

By virtue of their large size and relative sophistication, this group should be a medium to high communications priority. This group could be best reached through a strategy with the following messages:

- Distinct made-in-Canada approach
- Risks are real (but not exaggerated or imminent)
- Individual preparedness is inadequate
- Raise volume on oversight and redress (for human rights)

Media: television and the Internet





## Security-Focused Supporters

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## **Segment 2 –Security-Focused Supporters**

The Security-Focused Supporters group comprises 19 per cent of the Canadian population.

### Key Features:

- Attentive and engaged (e.g., follow news and current events)
- High awareness of federal measures
- Focused strongly on security (e.g., security trumps civil liberties)
- Elevated (but not irrational) risk perception
- Highest trust in government
- Strong affiliation with conservative values

### Summary:

The Security-Focused Supporters is an engaged group. They report the highest levels of awareness of the government’s security agenda and, importantly, are most likely to support it (i.e. 78 per cent say the Government is moving in the “right direction” on security). Moreover, they are more likely than other segments to both approve of and have confidence in the government’s handling of security and related issues (e.g., terrorist attacks, weather-related disasters, or health crises).

For this group, security almost entirely trumps civil liberties (e.g., three in four choose security over civil liberties). They are also the least concerned about threats to their personal privacy, and most favour an enhanced role for authority figures – even at a cost to civil liberties (e.g., two-thirds support greater powers for police in terrorist investigations even if it infringes on their rights). This may be because they are also the most likely to trust institutions to balance security with civil liberties.

Somewhat surprisingly, this group’s support for more security does not seem to be the result of greater feelings of vulnerability. They express average concerns about terrorism and are the most likely to believe that Canada has become safer over the past few years.



The Security-Focused Supporters segment is more likely to be composed of individuals with some form of post-secondary education (college or university). Landed immigrants / permanent residents and those with an up-to-date passport are slightly overrepresented in this segment. This group is also the most likely to indicate a lean to a conservative political ideology (42 per cent). They are also the segment that has a higher proportion of individuals who follow news and current events.

Effective Messaging:

The Security-Focused Supporters are onside with what the government is currently doing and represent their core support. They are, however, also highly attentive. In order to maintain this core constituency, this group should be rated a medium communications priority. This segment can best be reached through the following types of messaging:

- “The Government of Canada is minding the store”
- Protection and security is a top priority

Media: television and print (newspapers)





## The Vulnerables

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### **Segment 3 – The Vulnerables**

The Vulnerables make up 20 per cent of the Canadian public.

#### Key Features:

- Disengaged (e.g., least likely to follow news closely)
- Lowest awareness of federal measures
- Single-minded focus on security (e.g., security trumps civil liberties)
- Vulnerable (e.g., greatest concerns about terrorism)
- Parochial (e.g., believe there are too many immigrants)
- Amerophiles (e.g., strongest pro-American sentiments)

#### Summary:

The defining feature of this segment is that they feel they are in the crosshairs of threats: they are most likely to believe that “it is only a matter of time before there is a terrorist attack in Canada” and are also more likely to feel personally threatened. For the Vulnerables, the world (and even Canada) is a dark and dangerous place and this general anxiety is reinforced by a strong conviction that things are getting worse, not better. These concerns, however, have not compelled this group to prepare for such events (i.e. they report being the least prepared for an emergency such as a terrorist attack).

Their generalized sense of vulnerability leads to a fairly one-dimensional focus on security. For example, they are the most likely to indicate that the government’s security response has been “too slow” and would therefore like to see a more strict approach adopted. Yet, the Vulnerables are also the least engaged segment: (e.g., they are less likely to follow news and current events) and are the least likely to be aware of the government’s security agenda (89 per cent report “no awareness”). It could be suggested that what this group is looking for is a more “American” approach to security (e.g., they are the group that is most likely to indicate that they would like to see Canada become more like the U.S. in the future).

Like the Security-Focused Supporters, these individuals are indifferent to civil liberties (e.g., more than three in four choose security over civil liberties). This indifference, however, likely relates to their comfort with current security measures (e.g., they are the most likely to indicate that they have not been affected by increased measures). These individuals are also less likely to feel as though their privacy has been threatened. As the most intolerant group (46 per cent feel there are “too many” immigrants coming to Canada) their opinions are unlikely to be swayed by the negative experiences of others.

The Vulnerables are also similar to the Security-Focused Supporters in that they express higher than average trust and confidence in government to address their concerns (e.g., they are more likely to feel that government is capable of striking the right balance of security and civil liberties and more likely to express high confidence in the government to respond to various crises). They are also less likely to have reservations about enhancing the role for law enforcement.

The Vulnerables segment contains the largest proportion of older Canadians (19 per cent over the age of 65) and those with a high school education or less (48 per cent). Those born in Canada and Aboriginal people are slightly overrepresented in this group. This group also contains the second highest proportion of individuals who lean towards a conservative ideology (36 per cent).

#### Effective Messaging:

The Vulnerables, like the Security-Focused Supporters, are supportive of the government. They are also the least engaged, which makes them a medium to low communications priority. This segment can best be reached through the following types of messaging:

- Protection and security are salient concern of government
- “Canada is standing on guard” and working closely with the United States

Media: television





## The Moderates

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## **Section 4 – The Moderates**

The Moderates group is the smallest segment, representing 16 per cent of the Canadian population. This represents the centre of public opinion on this topic.

### Key Features:

- Not attentive and not engaged
- Lower awareness of federal measures
- Indifferent to threat (e.g., think terrorist attack is unlikely)
- Moderate to high levels of trust in government
- Tolerant and non-ideological
- Typically hold middle of the road views

### Summary:

The Moderates is the group that is least likely to stand out for having strong views on any one issue. They are somewhat less likely to follow news and current events and are less engaged in the security debate (57 per cent have “no awareness” of the government security agenda).

Although they are not overly informed, they seem to trust the government inherently: they are most likely to say that government has “responded appropriately” to the issue of terrorism (and they support the direction and pace of changes). They tend to have moderate concerns with terrorism or related threats (e.g., most do not think that Canada has become either more dangerous or safer over the past five years). Although they, like most other segments, lean towards security over civil liberties, this is not to say that they do not have concerns with the latter. Privacy, in particular, seems to be a sensitive issue for them (e.g., two-thirds feel they have less privacy than 2 years ago). They also tend to be somewhat more supportive of immigration (e.g., they are most likely to say that they think there are “too few” immigrants).



Their generally middle of the road views further extend to Canada's relationship with the United States (e.g., most do not think that Canada has changed and most would like things to remain as they are).

The demographic profile of the Moderates is, as would be expected, not very distinct. Visible minorities and disabled Canadians are somewhat more likely to be in this segment, as are Canadians without a passport. They are the most ideologically neutral group (49 per cent identify as neither liberal nor conservative). They are somewhat more likely than others to reside in Quebec or rural areas.

Effective Messaging:

The Moderates have no distinct communications needs and as such they represent a low communications priority.





## Privacy-Focused

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## **Segment 5 – Privacy-Focused**

The Privacy-Focused segment comprises 19 per cent of the Canadian population.

### Key Features:

- Highly attentive and engaged
- High awareness of federal measures
- Concerned with privacy and civil liberties
- Elevated (but not irrational) risk perception
- Liberal ideology
- Wary of the United States

### Summary:

This is a crucial segment. As the name suggests, this segment is very concerned with privacy issues; they feel that they are under siege in this respect and are overwhelmingly the most likely to say that their privacy has been eroded (77 per cent feel that they have less privacy than they did two years ago). This segment is also most likely to indicate having been affected by security measures introduced after September 11<sup>th</sup>. Their concerns are by no means restricted to privacy and, with this exception, they tend to resemble the Skeptical Nationalists.

Likely due to their experiences, this segment tends to be less approving of government's security response – something that they are acutely aware of (i.e. 55 per cent indicate having a "clear" recollection of the government's security agenda). They are the most likely to say that the response has been hasty and has "gone too far", and they also think the government continues to head in the wrong direction on this front. Not surprisingly, they are also somewhat skeptical about the government's ability to protect civil liberties.

Similar to the Skeptical Nationalists, this segment is apprehensive the about powers afforded to police and security agencies (e.g., they are less likely to think that police need enhanced powers, especially at a cost of privacy or civil liberties). This is true even though they evoke a somewhat stronger sense of personal vulnerability (e.g., they are most likely to believe that Canada has become more dangerous).

The Privacy-Focused are also concerned by the level of influence they perceive the United States to have had on Canada over the past decade (e.g., 90 per cent say Canada has become more like the U.S.) and most would like this to change in the future (e.g., 73 per cent want Canada to becomes less like the U.S.).

The Privacy-Focused segment is more likely to be composed of middle-aged (61 per cent are between 35 to 64 years of age) and well-educated Canadians (i.e. highest proportion of those with a university education). Men, Internet users, and those who have passports are also somewhat overrepresented in this segment. This group contains a higher than average proportion of individuals who identify with a liberal ideology, and the Privacy Focused are also somewhat more likely reside in Quebec. They are the segment that is most likely to follow news and current events and are more inclined than others to get their news from Canadian sources (66 per cent).

#### Effective Messaging:

The Privacy-Focused represents the most attentive, critical, and sophisticated segment of the Canadian public. They are also amongst the most politically active and efficacious. For these reasons, this segment should be the highest communication priority. This segment would benefit from messaging that is similar in tone and content to that intended for the Skeptical Nationalists:

- Raise volume (and resources) for oversight / redress agencies (“Where do I turn?”)
- Unique made-in-Canada approach
- Risks are real / vigilance is essential

Media: print (newspapers and magazines)





## Appendix A: Research Methodology

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## Research Methodology

The results presented in this report are based on the following:

- A telephone survey completed with a stratified national random sample of 2,018 Canadians, aged 18 and over undertaken between January 17 and January 24, 2007.
- In order to classify the Canadian population into identifiable groups, a two-stage multivariate analysis was performed.
- First, a factor analysis provided the basis for identifying variables that, taken together, could represent several dimensions.
- Second, a cluster analysis was undertaken that produced different models for consideration. After looking at the properties of the various models, it was determined that the final solution involved a model with five clusters.
- Findings may be considered accurate within +/-2.2 percentage points, 19 times out of 20.





## Appendix B: Tables

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**Table 1 – Demographic/Background Differences**

Key differences	Total	Skeptical Nationalists	The Moderates	Security-Focused Supporters	Privacy-Focused	The Vulnerables
<b>Overall composition</b>	<b>100</b>	<b>25</b>	<b>16</b>	<b>19</b>	<b>19</b>	<b>20</b>
<b>Gender</b>						
Male	49	46*	51	49	53*	48
Female	51	54*	49	51	47*	52
<b>Age</b>						
<25	15	21*	17	10*	10*	16
25-44	39	41*	39	39	36*	37
45-64	30	25*	29	32	37*	27*
65+	16	12*	15	18	15	19
<b>Education</b>						
High School or Less	35	35*	41*	27*	26*	48*
College	26	23*	28	31*	22*	27
University	39	42*	31*	42*	52*	25*
<b>Visible/Non-visible Minority</b>						
Visible minority	11	11	13	11	10	12
Aboriginal	4	3	4	3	3	6*
Disabled	5	3*	6	6	4	5
None of the above	80	83*	77	80	81	76*
<b>Passport</b>						
Yes	47	48	41*	51*	51*	42*
No	53	52	58*	48*	48*	57*
<b>Ideology</b>						
Liberal	27	35*	23*	22*	35*	19*
Neither	41	44	49*	32*	40	41
Conservative	28	17*	25	42*	21*	36*
<b>Follow News and Current Affairs</b>						
Very closely	31	25*	24*	42*	42*	22*
Fairly closely	49	52	47	46	48	49
Not too closely	16	18	23*	10*	9*	23*
Not at all closely	4	6*	6*	1*	1*	6*
<b>Type of TV News **</b>						
Network news	53	53	58	51	53	52
Cable networks	44	44	40	46	43	46
<b>Source of news **</b>						
Mostly Canadian channels	61	61	60	64	66*	54*
Mostly American channels	3	3	5	3	1*	4
Both Canadian and US channels equally	36	36	35	32	32	41*

\* Differences are statistically significant from overall average. \*\* Respondents who get some of their news from TV

**Table 2a – Key Attitudinal Differences**

Key differences	Total	Skeptical Nationalists	The Moderates	Security-Focused Supporters	Privacy-Focused	The Vulnerables
<b>Overall composition</b>	100	25	16	19	19	20
<b>Risk/Threats</b>						
Likelihood of terrorist attack on them/family						
Not likely (1-2)	65	69*	68	66	62	61*
Somewhat likely (3-5)	30	27*	27	30	34*	33*
Very likely (6-7)	3	3	3	2	2	3
Matter of time for attack on Canada						
Disagree	35	42*	32	33	34	30*
Neither	18	17	19	19	18	16*
Agree	46	40*	47	47	48	52*
Canada safer/more dangerous						
Safer	15	11*	17	22*	13	14
About the same	50	55*	55*	46*	46	46
More dangerous	35	34	26*	32	41*	39*
<b>Government Response</b>						
Awareness of federal measures						
Clear awareness	24	0*	4*	64*	55*	0*
Vague awareness	28	16*	38*	36*	44*	11*
No awareness	48	82*	57*	0*	0*	89*
Government direction on national security						
Right direction	57	42*	61	78*	50*	59
Wrong direction	30	41*	25*	14*	40*	26*
DK/NR	13	17*	14	8*	10*	14
Canada's security response to issue of terrorism						
Gone too far	11	19*	9	3*	19*	4*
Responded appropriately	57	54*	65*	63*	51*	55
Not far enough	28	22*	24*	32*	26	38*
Emphasis						
Protecting public security	60	50*	56*	74*	47*	77*
Protecting civil liberties	33	44*	35	20*	46*	18*
Neither	3	2	5*	3	5*	1*
DK/NR	3	3	4	3	2	4
Extent impacted by security measures						
Low extent	51	50	51	50	42*	59*
Moderate extent	29	27	30	27	32*	28
High extent	20	21	17	22	26*	12*

**Table 2b – Key Attitudinal Differences**

Key differences	Total	Skeptical Nationalists	The Moderates	Security-Focused Supporters	Privacy-Focused	The Vulnerables
<b>Overall composition</b>	100	25	16	19	19	20
<b>Government Response (continued)</b>						
Confidence in federal ability respond to health crises						
Low confidence	15	22*	13	10*	16	11*
Moderate confidence	65	61*	63	63	72*	68
High confidence	19	16*	23*	27*	12*	20
Trust fed govt to balance security/civil liberties						
Disagree	32	59*	25*	12*	41*	15*
Neither	22	21	28*	17*	22	20
Agree	46	20*	46	71*	37*	62*
Police and intelligence should have more powers ...						
Disagree	40	54*	42	25*	51*	27*
Neither	14	16	16	11*	13	12
Agree	45	30*	40*	63*	36*	59*
<b>Broad Privacy Concerns</b>						
Less personal privacy than two years ago						
Disagree	38	37	13*	74*	6*	54*
Neither	20	22	20	15*	16*	28*
Agree	41	40	66*	10*	77*	17*
<b>Canada/US Relations</b>						
Canada/US over last 10 years						
More like the US	55	85*	0*	40*	90*	46*
Less like the US	9	0*	42*	10	0*	2*
Remain the same	33	13*	55*	48*	8*	49*
Future direction for Canada/US						
More like the US	6	0*	7	9*	2*	15*
Less like the US	52	90*	38*	34*	73*	13*
Remain the same	40	9*	54*	54*	22*	70*
<b>Attitudes to Immigration</b>						
Immigration						
Too few	14	17*	19*	17*	16	3*
About right	51	50	53	58*	54	41*
Too many	25	21*	17*	15*	21*	46*