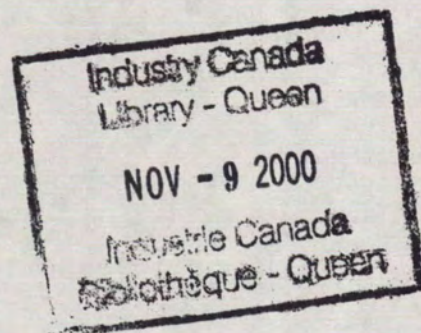


# VIEWS ON INNOVATION IN CANADA

Final Report



*Submitted to:*  
Industry Canada



*March 2000*



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## INTRODUCTION

Improving Canada's innovation performance and the transition to a knowledge-based economy are key objectives of Industry Canada. Achieving these public policy goals requires increased awareness of the importance of innovation to Canada's economy and to the standard of living of all Canadians. It is also important for businesses and young people, in particular, to become aware of the many Government of Canada programs and services that support innovation.

The primary purpose of this study is to determine both the business community's and general public's awareness of, and response to, a number of Government of Canada innovation programs. This research report is designed to provide Industry Canada and the Industry Portfolio with information to help them communicate their innovation initiatives in the short term (Spring/Summer 2000), and to provide some insight and advice on longer-term communications options for an innovation agenda.



## METHODOLOGY

Phase One - The qualitative component of the study consisted of 12 focus groups. Two groups were conducted in each of the following cities: Moncton, Montreal, Trois-Rivières, Toronto, Calgary and Vancouver. Five groups were conducted with members of the general public who hold positive views concerning the future of the Canadian economy; three groups were conducted with Canadians who have low levels of confidence in the Canadian economy; and four groups were conducted with owners/managers of small to medium sized businesses in Canada.

In the groups, a series of Government of Canada news releases, information/fact sheets and newspaper articles were viewed and discussed by the participants. A common moderator's guide was used to guide discussion. The final guide is attached in Appendix III.

Phase Two – For the quantitative component of the study questions were placed on the National Angus Reid Poll to establish an awareness and knowledge baseline, and to quantitatively evaluate the most popular policies, initiatives, and messages emerging from the focus groups. The final wording of these questions is attached in Appendix IV.

Note: The focus groups' findings presented in this report are not statistically representative of the Canadian population. They are designed and reported to provide insight into the "why" Canadians feel the way they do about innovation and the Government of Canada's involvement in innovation.



## KEY FINDINGS

- ◆ **There is low awareness of Government of Canada innovation programs and initiatives.** As well, few Canadians perceive a lack of “innovation” in Canada – most assume that Canada is on the leading edge in many areas of technology, and that Canada is an innovative country. At the same time, many feel that Canada’s economy is still based on natural resources.
- ◆ **There is moderate interest in government efforts to address the “innovation” issue.** Because most people do not see a lack of innovation nor do they see a direct connection between innovation and their quality of life, they are not actively looking for government efforts to address the issue.
- ◆ **There is high support for strategic “investments” in innovation.** Once informed of the declining levels of research and development, and once they have seen some examples of the Government of Canada’s innovation efforts, a majority of focus group participants are supportive of the direction and management (investments, partnerships with businesses and universities, etc.) of the innovation agenda. They see activity in this area as a legitimate role for the Government of Canada. There is however, less support for direct investment in federal institutions like labs and research centres.
- ◆ **Too many players communicating the innovation agenda means too much spent on bureaucracy.** Canadians do not want to hear about the creation of new institutions or the myriad of agencies involved in “innovation”. They would prefer to hear from one voice (Government of Canada) about what has been accomplished, how their taxes have been spent, and what the anticipated return on their investments is in terms of new products/services that apply to their day-to-day lives.
- ◆ **Brain drain/taxes/research and development all make up the public’s “innovation agenda”.** While tax relief is the main priority, it would be difficult to communicate any “innovation agenda” without discussing all of these issues.

♦ **The touch stones for communicating the Government of Canada's innovation agenda are:**

- ♦ Accountability
- ♦ Return on investment
- ♦ Creating partnerships
- ♦ Demonstrating benefits to average Canadians
- ♦ Ensuring Canada keeps pace with other countries



## RECOMMENDATIONS

- ◆ In addition to media relations, ministerial communications, etc., any paid communications should focus on a print campaign aimed at communicating the Government of Canada's "Strategy for Economic Innovation" to small- and medium-sized business and young people.
- ◆ Any paid communications campaign must have a purpose (i.e., providing information to businesses and young people on how they can get involved in the Government of Canada's innovation agenda) to be credible.
- ◆ Key messages
  - Canada's Innovation Strategy, through strategic investments, new opportunities and lower taxes, will help stem the brain drain, keeping the best and brightest in Canada.
  - Canada's Innovation Strategy will help small- and medium-sized business take advantage of research and development to launch new products, new ideas, new services – to continue to build and strengthen Canada's place in the knowledge-based economy.
- ◆ Part of the campaign could include issuing an annual report card on innovation, emphasizing how Canada is doing relative to our competitors and highlighting public- and private-sector success stories.



## FOCUS GROUP FINDINGS

### Most Important Issue Facing the Canadian Economy?

- ◆ Healthcare, education and tax relief continues to dominate the public agenda in terms of the most important issues facing the country (see quantitative survey). However, the focus groups revealed a different set of concerns when participants were asked to focus on issues facing the Canadian economy.
- ◆ When participants are asked what the most important issues facing the Canadian economy are, high taxes and the brain drain are at the top of most people's list. Secondary issues include: too much red tape, trade restrictions, maintaining the social safety net, globalization and the transition to a technology-driven economy in all sectors. Very few participants mentioned Canada's debt or the specific need to increase research and development or innovation in Canada.
- ◆ With the HRDC grants controversy playing out in the media on a daily basis during these groups, it is understandable that "accountability for government spending" is top of mind, and in the context of these groups, was often mentioned as a way to help improve the Canadian economy. Many felt that more stringent investment criteria and a tracking of results would result in greater returns/outcomes, better public/business relations, and improved impressions of government among all Canadians.

*"We have a lot of problems with the way we spend money as opposed to how much we spend."*

*"My concern is how effective they've [government] been in giving the money out... How much have they squandered? I would like to see them [government] apply it [funding] effectively. I'm not sure the government is capable of doing that."*



## Taxes

- ◆ The need for tax cuts dominated the eastern/pre-Federal Budget focus groups discussion of the most important issue facing the economy. In the western/post-Budget groups, tax relief was still important, but clearly less of an issue. This probably had less to do with the Federal Budget and more to do with the western cities where groups were conducted. In Vancouver (where the economy has been slumping), for instance, participants emphasized the need to ensure sufficient funding to social programs (e.g., health and welfare) at a time when people need them most. In Calgary (where the economy remains strong, there is no provincial tax, and healthcare (with the introduction of Bill C-11) tops the provincial agenda), the groups emphasized the need to adequately fund healthcare and education and (in the business groups) to improve trade access to the United States.
- ◆ All participants (with the exception of the business group in Toronto), whether they were pro or anti tax cuts, recognized that lower taxes would help the economy, but they also cautioned that the drive to lower taxes might also hurt Canada's social safety net. The vast majority of participants want to ensure that there is some balance brought to any tax-cutting exercise that ensures sufficient funds are also allocated to the top priorities of health and education.
- ◆ The business groups were much more likely to suggest that tax cuts were required to push the economy forward, and for them, tax cuts included both the personal and corporate taxes. For the general public groups, the issue of tax cuts was more principle driven, with some feeling that the government, through mismanagement, had relinquished the "moral right" to tax and spend, while others felt that a tax break was what they finally deserved after suffering through the last recession and the government cut backs that accompanied the fight on the deficit.
- ◆ It should be noted that the business participants did not readily link lower corporate taxes to increased investments in "innovation" or research and development.



## Brain Drain

- ◆ While tax cuts dominated the agenda of the business groups, “stemming the brain drain” was a close second among the business participants, and was also a priority for the general public groups.
- ◆ This issue is closely linked to taxes, with many believing that lower taxes are luring the best Canadians south to work in the United States. However, participants also recognize that there is the issue of providing sufficient opportunities in the areas in which young people want to work and study, and the need to provide competitive salaries.
- ◆ Many believe that for some of Canada’s best and brightest, money is not a primary issue, but being on the cutting edge of their field is. Most participants cite the inability of Canada and Canadian companies to provide these kinds of opportunities. They cite high taxes and the inability of small Canadian companies to offer competitive financial packages as equally contributing to the brain drain problem.
- ◆ It should be noted that unlike the tax issue, where any reduction is seen as (at minimum) at least a step in the right direction, the brain drain issue is not as clear-cut: participants are split on the best way to address the issues. Some ideas for government include: lower taxes, more money for universities, improved immigration policies, tying education funding to a requirement to work a minimum number of years in Canada, and improving Canada’s health system and quality of life.

*“I believe it’s important to retain people with knowledge and that we provide scholarships and training. At the same time, we need personal tax cuts...”*

*“Everything looks great, but I’m cynical about whether it will happen. I feel there should be some kind of contract about keeping business in Canada.”*

*“The government has to level the playing field if we want to keep talent in Canada...tax cuts.”*



## Other Economic Issues...

**Trade restrictions:** "Problems associated with moving goods and services between Canada and the U.S.", was mentioned by the business groups; however, this was not seen as a pressing issue for the general public, who feel that free trade exists already.

**Government red tape:** Again, "red tape" was mentioned mostly by the business groups, and was mentioned less by the general public. For the most part, there is a view that governments move too slowly, and that there is too much paper work for business, whose focus should be on making a profit and growing their business, not reporting to government.

**Maintaining the social safety net:** Most participants saw a clear link between quality of life and improved economic conditions. However, there is a bit of a chicken-and-egg debate occurring, with half feeling that a strong society and social safety net would create a strong business environment. Others feel that economically-successful businesses and Canadians are the ones paying for the social safety net, and that without a thriving economy, the safety net will continue to decrease.

**Globalization:** Most of the concern vis-à-vis globalization was on being prepared to face the increased competition which confronts all Canadian businesses, and Canada's ability to take advantage of these new markets/opportunities.

**Transition to a technology-driven economy:** While participants were quick to point to high Internet stocks and Canada's strong telecom reputation, they also recognize that technology affects all sectors (including Canada's traditional resource-based industries) and sizes of businesses *with those who invest in technology more competitive than those who don't*. They did not appear overly concerned or aware that Canada was falling behind in the technology race. In fact, many participants felt that Canada's technology ability is quite strong, particularly in the area of telecommunications.

***The federal government's debt.*** While this was not mentioned as a top priority, the Calgary participants and the business groups did highlight the debt, specifically, high interest charges, as an issue facing the Canadian economy.

## **How to Help the Canadian Economy**

- ◆ When participants were asked what governments could do to help the economy, the number-one reflex response was "cut taxes and get out of the way". However, as debate moved forward and more considered thought was given to the question, it is clear that most participants see the need for an active government agenda that focuses on areas on which the private sector can't or won't focus. The items at the top of the list are: stemming the brain drain, investing in education and human capital and improving Canada's social programs and quality of life. "Increasing innovation and research and development" was not a top mind response for participants.

***"Eliminate taxes."***

***"We need a better venture capital market..."***

***"Technology companies in Alberta aren't getting tax breaks. In Quebec, they're getting huge tax breaks for technology innovation."***

***"The government needs to do more to support business...If you actually have a viable idea but it's not technology-related, they don't have a program for it."***

***"The government does have programs to help you start."***

***"Shouldn't the funding come from the private sector rather than the government?"***



## Awareness and Perceptions of Innovation

- ◆ Awareness of the innovation issue is low; however (once prompted), in most centres and among the vast majority of participants, recognition of the importance of innovation (research and development in particular) is intuitively clear and tied closely to the future success of the Canadian economy.
- ◆ The term "innovation" does not carry any negative impressions. It is seen as creative, forward looking, and (for most participants) closely linked to business and economic issues.
- ◆ While the links between innovation and Canada's economy, successful businesses, and the quality of life in Canada do not appear to be top of mind, most participants are quick to see and understand the connection once mentioned.
- ◆ Most business participants understand the importance of and the need for innovation (e.g., research and development, science and technology, adopting new technology/processes, etc...) even if they say that their organizations don't act on innovation.
- ◆ Awareness of Government of Canada initiatives and programs to encourage or support innovation (including research and development, science and technology, etc.) is very low, with few participants able to name any concrete examples.

***"It's really naïve to think that the way the economy works doesn't affect your quality of life."***

## Support for Government of Canada Innovation Programs/Expenditures

- ◆ After reviewing print materials of Government of Canada innovation initiatives (news releases and brochures), a majority of participants were very supportive of these kinds of programs and investments. The selection of news releases and brochures covered a fairly broad spectrum of government innovation spending, and for the most part, the public's perceptions were very positive, with many saying that these are the kinds of initiatives that their tax dollars should be going toward.
- ◆ There is, however, a bit of an "HRDC" shadow that is currently cast over all of spending/investment announcements, and while participants liked the direction and intent of the "innovation" announcements they reviewed, they were quick to say that they had some concerns about the "accountability" and wanted to know who reviewed the applications. "What guarantee do we have these are legitimate businesses?"
- ◆ It should be noted that the scepticism concerning the government's ability to spend/invest effectively is not new; the HRDC situation has only confirmed the public's beliefs and given them a constant reminder that accountability is a problem.
- ◆ Despite the "HRDC boondoggle", there is wide acceptance and support for government spending in the area of innovation. Many participants doubt that they are hearing the whole story on government accountability. There is healthy scepticism that the examples they hear from the Opposition parties and in the media are only the losers, and that there are winners (e.g., investments and grants that have successfully created jobs and helped businesses) that they have never heard about.

*"This package is a positive sign...Attempting to stimulate grass-roots knowledge and experience."*

*"Encouraging research and technology and putting money in grants projects in innovation keeps Canadian talent in Canada."*

*"I look at all these things [initiatives] and they're great. I wish they were happening but realistically..."*

*"They are trying to create partnership between universities and private sector...developing industries as opposed to a select business."*

*"There's stupid stuff but also plenty of good stuff happening."*



*"Many of the projects are created to keep the bureaucrats working ...."  
"If they were sincere, if they really meant it, they would encourage [innovation] through  
tax breaks and incentives, not through headlines, spending money."*

## What Makes Innovation Programs/Expenditures Positive

The following section summarizes the attributes that make these innovation initiatives positive to Canadians.

- ◆ ***Those seen as true investments.*** The concern over accountability is in large part responsible for many participants saying they favour initiatives that most closely represent private-sector investments. If the initiative involves joint funding and (business/academic/government) partnerships, this is seen as a good way to lessen the risk of government misspending and to increase the likelihood for a successful outcome.
- ◆ ***Joint funding*** is also popular because participants feel that business should share the risk, especially since they have the most to gain. Participants are particularly impressed with initiatives that contain a return on investment for the government (e.g., a Technology Partnership Canada approach) as this is seen to provide a real return to Canadian taxpayers. It should be noted that for most participants, the "return" is viewed as monetary, and a "return" in jobs, new products, etc. is not readily evident. Even those participants who are opposed to government spending feel that government expenditures (at least those aimed at business) should follow this model.
- ◆ Few participants view these investments as taking risks with taxpayers' money. Business groups are most accepting of the risk issues, saying that what matters is that in the final ledger, "we all have winners and losers, but at the end of the year, the bottom line has to be positive."
- ◆ ***Those focussing on concrete outcomes for health, young Canadians and the environment.*** Aside from the "investment" angle, the initiatives that are most popular have clear implications and a recognizable impact for the general public. While the health-related initiatives are viewed most positively (because of the public's overwhelming concern for health), any initiative that demonstrates a clear and beneficial outcome tends to score higher.

- ◆ Investments in universities that would help young Canadians study at home and investments in a cleaner environment are also seen as positive initiatives. However, it is the anticipated direct outcome (new vaccines, cleaner environment, more spaces in universities) that are most identified with, and not the impact on the economy. The general public, for the most part, fails to make the top-of-mind connection between these outcomes and the development of new technologies, new industries and their contribution to a growing economy.
- ◆ The closer the initiative is to the public, the more relevant it is, and the more positively it is viewed. The space agency, while seen as a worthwhile initiative, is almost always ranked last (the worst of the best, so to speak) because most participants do not see the immediate applications for them in comparison to improved vaccines, cleaner pulp mills, etc. When participants were told that robotics developed for the Canadarm could find their way to the factory floor or help develop new prosthetic limbs for amputees, they were quick to see the benefits and questioned why this kind of information was not included in the news release. Many also noted that the Canadarm is great for Canada's international reputation, but without seeing the spin-off effects (e.g., conducting medical experiments in space, development of advanced robotics, etc.), overall support was diminished.

*"The key is in investment and there must be a return on investment."*

*"When I get a press release like this I can say "okay, we have an arm in space and I can feel proud as a Canadian but, beyond that, show me what's come out of it."*

*"You need the private sector to help out [with funding]."*



## QUANTITATIVE FINDINGS

### Methodology

Questions were included on the National Angus Reid Poll (NARP) to establish an awareness and knowledge baseline, and to quantitatively evaluate some of the key themes and messages emerging from the focus groups. Appendix IV contains a summary of the questionnaire and top line findings of the survey.

The NARP is a national omnibus survey that surveys some 1,500 Canadian households twice a month. The sample is a representative cross-section of adults, with a margin of error of +/- 2.5 percentage points 19 times out of 20, and the results are statistically reliable in each major region of the country. Field dates for this wave of the NARP were March 8 to March 14, 2000.

The table below summarizes the survey's regional breaks and overall margin of error for the national survey.

Region	Number of Interviews
British Columbia	200
Alberta	135
Manitoba/Sask.	120
Ontario	525
Quebec	400
Atlantic	120
CANADA	1500 (+/- 2.5%)

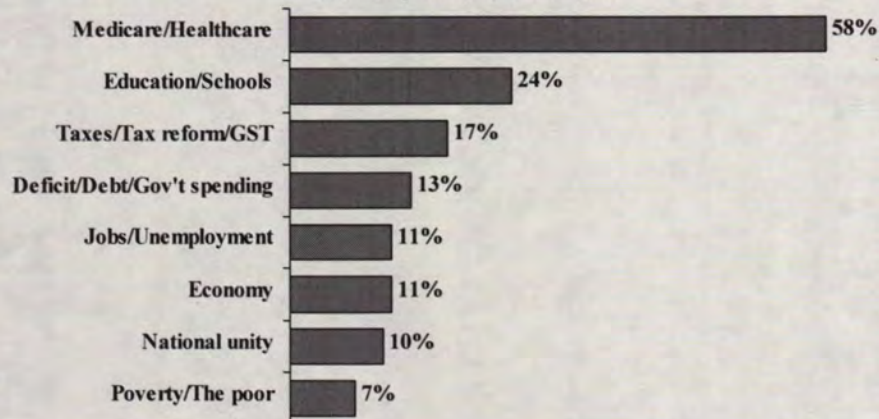


## Most Important Issue Facing Canada

As the following charts show social issues continue to dominate the public agenda. While the economy is obviously an important issue for Canadians, these charts have been included because it is important to see where innovation, research and development are in the context of Canadians' overall priorities.

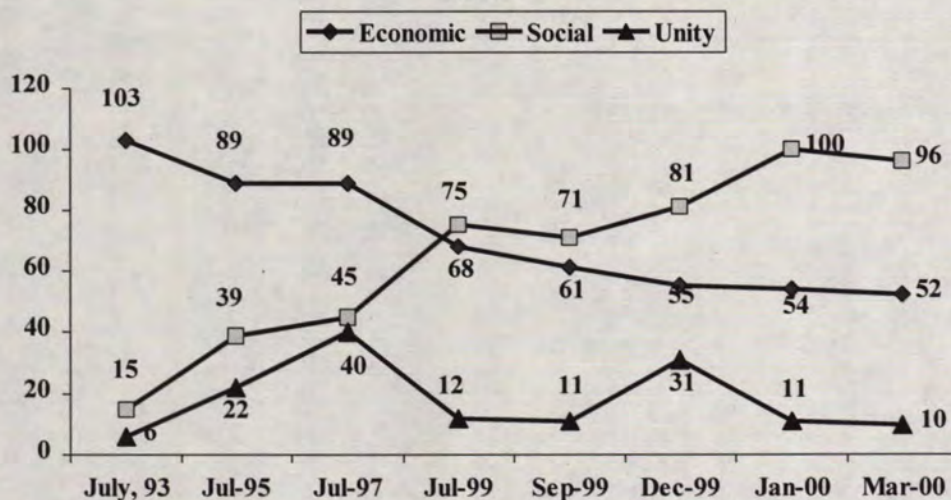
### Most Important Issue Facing Canada

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



### The Social and Economic Agenda

*"Net total responses to the question "What issues should receive the greatest attention from Canada's leaders?"*



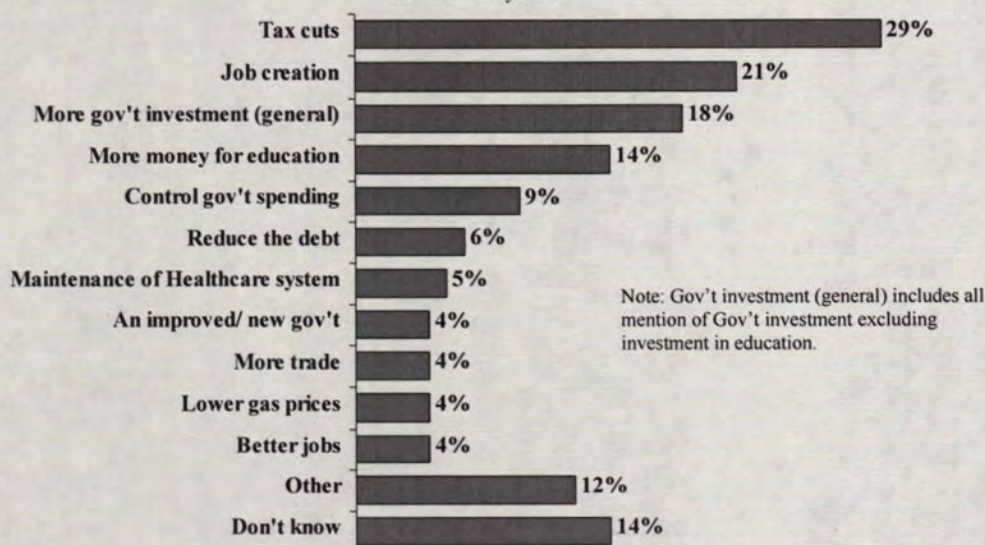
**Jan-00** (n=1,500, data collected on the National Angus Reid Poll)  
**Economic** = Taxes 17%, Jobs 11%, Economy 11%, Debt&Deficit 13%  
**Social** = Health 58%, Education 24%, Poverty 7%, Environment 5%, Crime 2%  
**Unity** = National Unity & Quebec 10%



## Helping the Canadian Economy Grow

### Helping the Canadian Economy Grow

"What do you think needs to be done to help the Canadian economy continue to grow over the next ten years?"



N=1,516

March 2000

As the chart above shows, tax cuts (29%), job creation (21%), more government investment in general (18%), and more money for education (14%) are seen as necessary for the Canadian economy to continue growing over the next ten years.

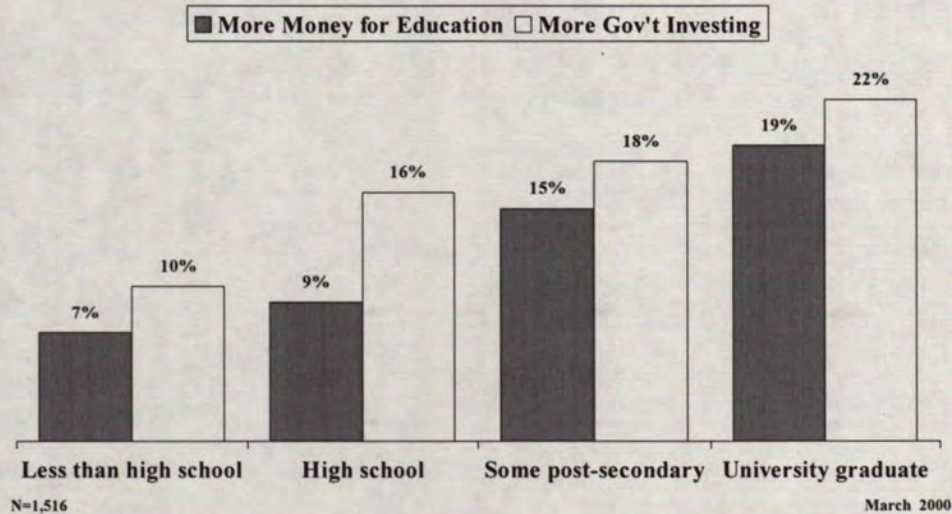
While these numbers hold fairly consistently across Canada's geographic regions, there are some significant variations based on gender, with women (25%) more likely than men (17%) to favour job creation and the increase of money for education (women 16% vs. men 11%). In contrast, men (33%) are more likely than women (24%) to say that tax cuts are required. Only 2% of Canadians mentioned increased research and development as necessary to keep the Canadian economy growing.



As the following chart shows, the responses also vary somewhat by income and education levels, specifically, "recognition of the need for government investment" and "more money for education" increase with level of education attained.

## Helping the Canadian Economy Grow

*"What do you think needs to be done to help the Canadian economy continue to grow over the next ten years?"*



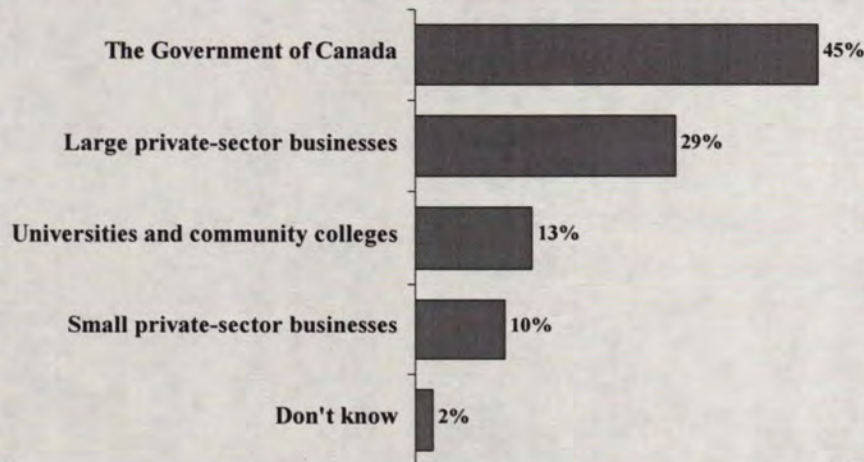
In addition, Canadians with a lower income, i.e., those whose annual household income is under \$30,000 (26%) are more likely than Canadians with a higher income, i.e., those whose annual household income is over \$60,000 (18%) to emphasize the need for new job creation. Canadians with a higher income are more likely than those with a lower income to say that reducing the debt (10% vs. 5%), more government investment (21% vs. 15%) and tax cuts (39% vs. 20%) are important for the economy to move forward.



## Who Is Most Responsible for Making Sure Canada Keeps Pace?

### Who Is Most Responsible For Making Sure Canada Keeps Pace?

*"Now, thinking about research and development, and economic innovation that is, the ability of a country and its businesses to create new products, services and ideas - who do you think should be MOST responsible for making sure that Canada keeps pace with other countries?"*



N=1,516

March 2000

When asked who is most responsible for making sure that Canada keeps pace technologically with other countries, a plurality (45%) mention the Government of Canada. Residents of Atlantic Canada (54%), Quebec (47%) and Saskatchewan/Manitoba (47%) are most likely to say the Government of Canada is most responsible.

Women (53%) vs. men (38%) are also more likely to say the Government of Canada is most responsible. Men (32%) vs. women (26%) are more likely to say that large businesses or small businesses (13% to 8%) are most responsible for making sure that Canada keeps pace technologically with other countries.

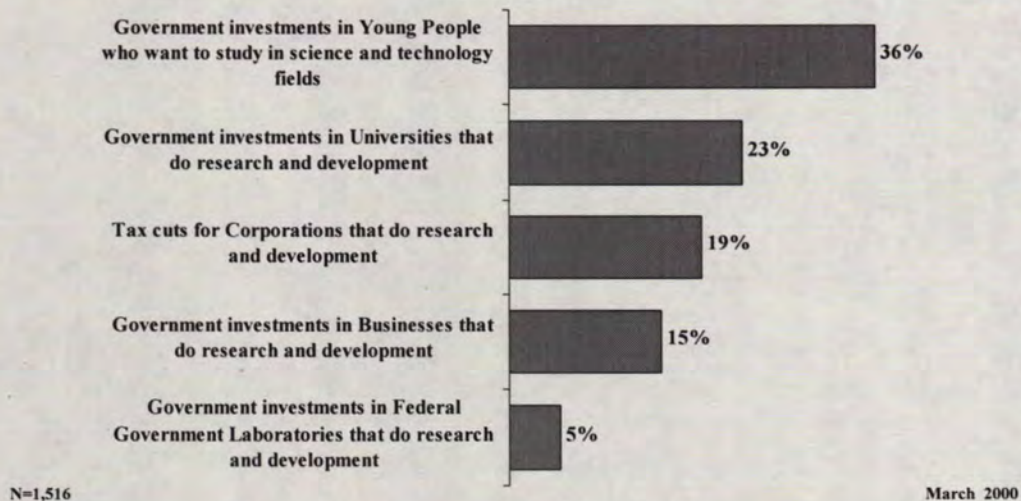
Canadians with lower levels of education (61% of those with less than a high school degree) and income (52% of those with household incomes of less than \$30k) are more likely to say that the Government of Canada is most responsible, while those with higher levels of education (31% of those with a university degree) and income (37% of those with household incomes greater than \$60k) are more likely to see the responsibility lying with large private-sector businesses.



## The Best Ways to Make Sure Canada Keeps Pace

### Best Way to Make Sure Canada Keeps Pace

*"Thinking about research and development, and economic innovation that is, the ability of a country and its businesses to create new products, services and ideas - which of the following do you think is the BEST way to make sure that Canada keeps pace with other countries?"*



When asked what they think is the best way to make sure that Canada keeps pace with other countries, Canadians are most likely to choose (see the chart above) "investments in young people" (36%), "investments in universities" (23%), "tax cuts for corporations that conduct R&D" (19%), and "investments in businesses" (15%). Only 5% feel that "investments in federal laboratories" is the best way to make sure that Canada keeps pace with other countries.

Men (24%) are much more likely than women (14%) to favour tax cuts for corporations that conduct R&D, while women (41%) are more likely than men (30%) to feel that investments in young people is the best way to make sure that Canada keeps pace with other countries.

Canadians with lower levels of education and income are also more likely to feel that investing in young people is the best way to make sure that Canada keeps pace with other

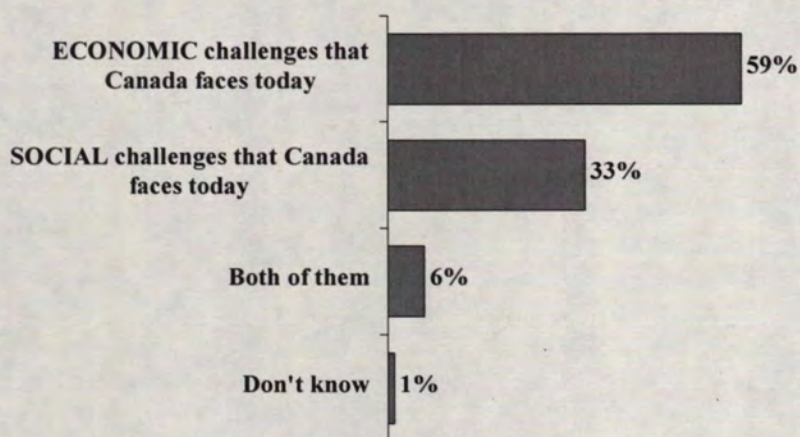


countries, while those with higher levels of education and income are more likely to support tax cuts for corporations that conduct R&D.

## What Does Innovation Mean to Canadians?

### What Does "Innovation" Mean

*"When you think about the word 'innovation', which of the following two statements comes closest to your own personal opinion?"*



N=1,516

March 2000

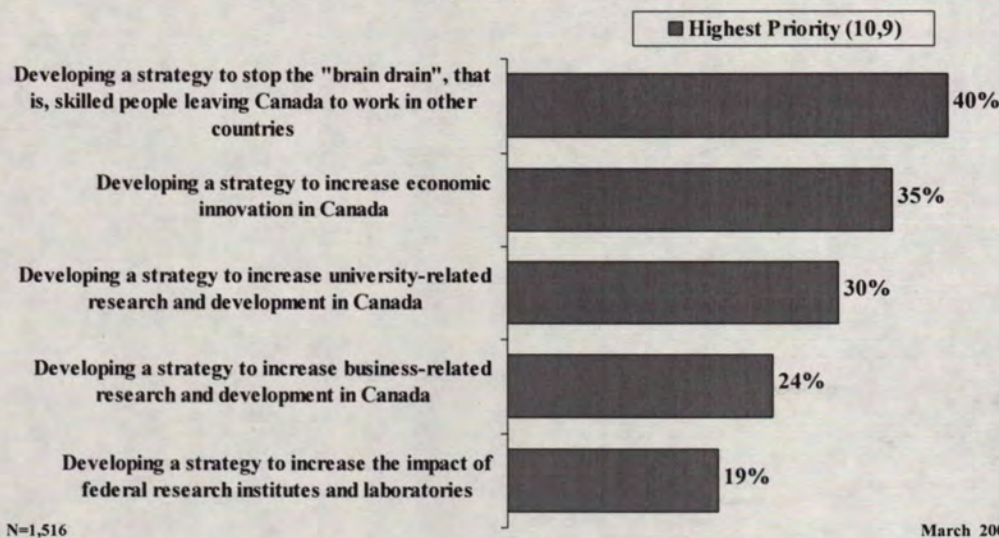
As the chart above demonstrates, "innovation" is twice as likely to be associated with an economic agenda than it is a social agenda. These results are consistent across the key demographic variables of region, age, gender, education, and income.



## Priorities for Innovation

### Innovation Priorities For The Government of Canada

Now, how much of a priority should each of the following be for the Government of Canada? Please respond using a scale from 0 to 10, where 0 means it should be a "very low priority" and 10 means it should be a "very high priority".



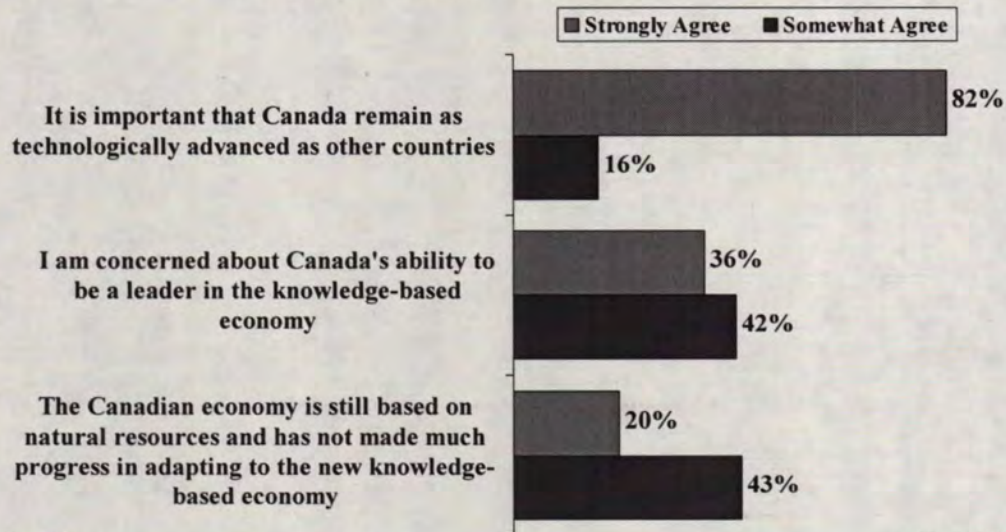
The chart above shows which initiatives Canadians consider the highest priority (ranked 9,10 on a scale of 0 to 10) for the Government of Canada. While all of these initiatives receive positive support, the chart shows that "developing a strategy to stop the brain drain" and "developing a strategy to increase economic innovation" are considered a very high priority for over one third of Canadians.



## Canada at the Leading Edge

### Canada at the Leading Edge

"For each of the following statements, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree."



N=1,516

March 2000

As the chart above shows, over eight in ten (82%) strongly agree (overall 98% agree) that it is important that Canada remain as technologically advanced as other countries. This level of agreement is consistent across demographics, the exception being Canadians with low levels of income (76%) and education (75%), who are slightly less likely to strongly agree.

While eight in ten feel it is important that Canada keep pace, more than one third (36%) strongly agree (overall 78% agree) that they are concerned about Canada's ability to be a leader in the knowledge-based economy. This level of agreement is consistent across demographics.

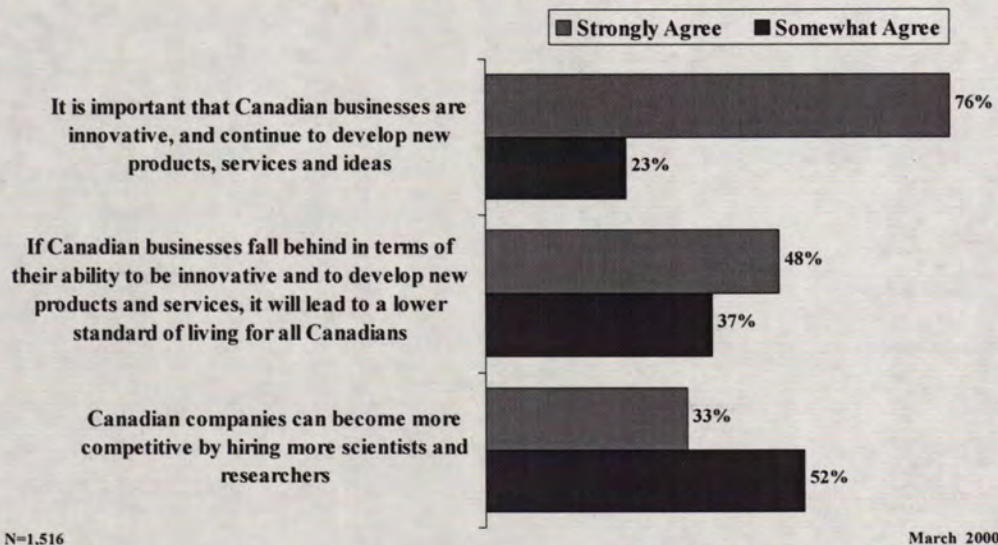
Two in ten (20%) strongly agree (overall 63% agree) that the Canadian economy is still based on natural resources and has not made much progress in adapting to the new knowledge-based economy.



## Canadian Business at the Leading Edge

### Canadian Business at the Leading Edge

*"For each of the following statements, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree."*



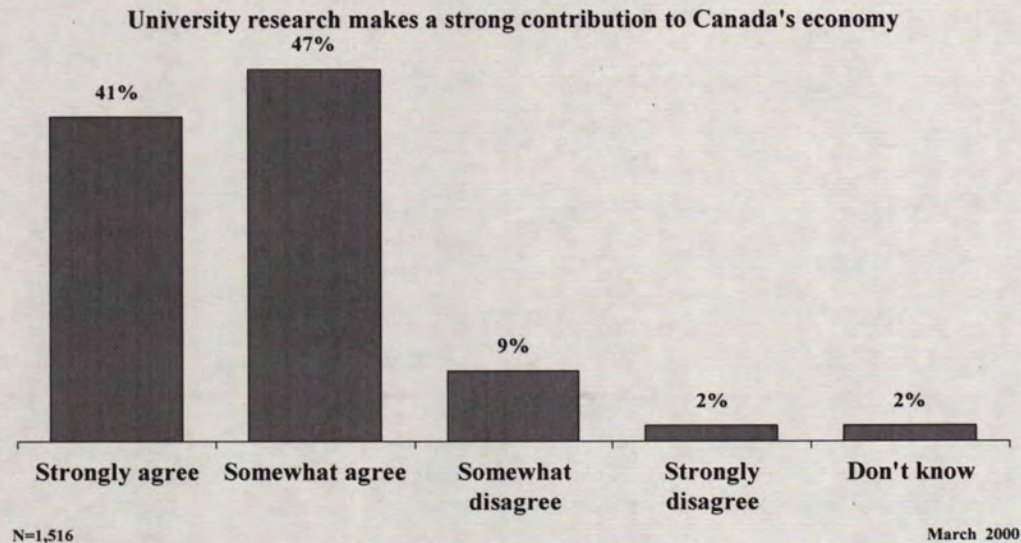
As the chart above shows, Canadians hold mixed views in terms of the need for businesses to be innovative. More than three quarters (76%) strongly agree that it is important for Canadian businesses to be innovative (overall 98% agree). However, fewer Canadians (48% strongly agree) feel that there is a connection between innovation and Canada's standard of living. When asked specifically if Canadian companies can become more competitive by hiring more scientists and researchers, only one third strongly agree (85% agree).



## The Role of University Research in the Economy

### A Strong Role for University Research in the Economy

*"For each of the following statements, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree."*



As the chart above shows, four of ten (41%) Canadians strongly agree (overall 88% agree) that university research makes a strong contribution to Canada's economy. Agreement is highest among older Canadians (those over 55 years old – 50% strongly agree) and Canadians with lower levels of education (47% strongly agree).



## COMMUNICATING THE INNOVATION AGENDA

Public views regarding the Government of Canada's innovation agenda can best be summed up as: ***LOW AWARENESS, MODERATE INTEREST, HIGH SUPPORT.***

### **Low Awareness – “Most are unaware that there is a problem”**

Overall, the general public is largely unengaged and unaware of the Government of Canada's efforts to promote “innovation”. As well, they are unaware that Canada might be falling behind in terms of innovation, research and development, etc.

There were pockets of knowledge, mostly around the government's effort to help improve Internet access and the existence of tax breaks for R&D companies, but most participants were somewhat surprised to know that the kind of initiatives highlighted in the news releases were actually occurring.

### **Moderate Interest – “The public is unlikely to seek out “innovation” information”**

In a focus group setting, the majority said that they were interested in the “innovation agenda” and feel that Canadians have a right to know where their tax dollars are being spent.. As well, most of the participants feel that increased awareness of the Government of Canada's role of innovating and related activities might contribute to promoting a culture of innovation among businesses and young people. That said, one Calgary participants said that, “If people were really interested, they could probably find out most of this information on a government Web site, but no one will actually go that far.”

**High Support – “Once informed of the innovation agenda, support is strong”**

In each group, there were typically one or two participants who viewed the initiatives negatively. Their rationale was either a philosophy of less government and lower taxes, or extreme scepticism of the government's ability to implement the initiatives in a successful non-participant way. In some groups, the nay-sayers were a bit of both. Aside from the naysayers, however, the vast majority in every group felt that these are the kinds of initiatives that the government should be focussing on, and that these “investments” were probably being properly managed.

While oversimplified, the “low awareness, moderate interest, high support” triangle translates into a larger set of communications opportunities and challenges that emerged during the focus groups.

**The most popular kind of initiatives** result in “public products” and clearly answer the question “what's in it for me?” Of the past announcements tested, the news release that focussed on healthcare (“\$13 million to develop new vaccines, fight strokes, etc.”) and the funding for three new Networks of Centres of Excellence received the most positive response by far, because it addresses the Canadian public's main priority: healthcare.

At the other end of the spectrum, the news releases for the International Space Station and for the Community Access Programs were consistently ranked near the bottom of the list, for very different reasons. As mentioned previously, while many recognized the symbolic value and the importance of the space announcement to Canada's international reputation, few saw its applications in their day-to-day lives. In the case of the Community Access Program, some participants viewed it as an initiative that is no longer required because the vast majority of Canadians already have access to the Internet. Most said that what is now needed



is to focus on content or on training the public, and showing them what they can do with the Internet. In the words of one individual, "it's a bit like providing a government program to buy colour televisions."

**A poor government track record.** Many participants could provide examples of misspent government funds and poor investment decisions. Few could recall positive examples. As a result, there is significant scepticism that the government can invest in winners. When participants were shown the NSERC pamphlet entitled "Bringing Discovery and Innovation to Life", they were pleasantly surprised to see real examples of success stories in which government investments had resulted in products applicable to the general public. Communications around the innovation agenda should provide examples of past success stories, as well as the present and the future of innovation, in order to demonstrate both competence (i.e., the government can pick winners) and accountability (i.e., past innovation investments have provided a return to Canadians).

**Low awareness that innovation is a problem.** As mentioned previously, "low levels of innovation, declining research and development levels, etc." were not mentioned top of mind by focus group participants when they were discussing the state of the Canadian economy. In fact, for most there is an assumption that Canada is probably doing pretty well on this front, at least commensurate with our country's size and in comparison to others.

Only when participants were shown the *National Post* article "Canada behind in innovation, report says – Oct 22, 1999" did they begin to attach some sense of urgency to their support for government innovation investments and initiatives.

As a result, communications should at a minimum emphasize that part of the goal of the innovation agenda is to keep Canada on the top-ten list of innovative countries in the world.

**Too much government.** One of the criticisms leveled at the materials tested and that came up in the general discussions as well, was the size and level of the government bureaucracy. While partnerships that included several private-sector or academic institutions were seen to be positive, communicating the number of federal departments or agencies involved tended to draw a negative reaction. It was surmised that more money is going to public servants to administer the programs than is going to the actual initiative. As well, mentioning the numerous agencies and programs tended to confuse the participants, and reduced the visibility and recognition of the Government of Canada.

**A Big Picture for Funding.** Many respondents commented that the dollar amounts invested in each announcement seemed small in comparison to the scope of the problem at hand. Most felt that even tens of millions of dollars over five years would not go very far in terms of creating new research and development positions or opportunities. To counter this individual announcements should be placed in some context vis-à-vis overall Government spending in similar areas. For example this investment is part of \$X00 million spent annually by the Government of Canada on research and development.



## A Template for Innovation Communications

Since most of the materials tested were news releases, the following template provides the layout and order (by public interest and priority) for a typical innovation news release. The same formula could also be applied to other innovation communications materials.

- A. The Government of Canada announces an investment of \$X to develop [expected outcome, new products that are most likely to appeal to the general public]. This investment is part of the Governments overall expenditures of \$XXX in this area.
- B. This investment is part of the government's broader strategy for economic innovation and stemming the brain drain in Canada. The strategy includes strategic investments, a five-year tax reduction strategy, increased access to new markets, partnerships with businesses and universities, and the creation of new opportunities in Canada for young Canadians.
- C. Past innovation investments have led to [insert success stories that are similar in scope or direction to the anticipated outcome of this announcement].
- D. This investment is based on [explain funding formula, decision criteria, emphasizing joint partnerships, the ability to leverage private-sector investment and any repayment/return on investment for the government that is anticipated].
- E. If you are a Canadian business or a young Canadian looking for information on how you can contribute to Canada's Strategy for Economic Innovation, call 1-800-O-Canada or go to [www.innovation.ca](http://www.innovation.ca).

Note: The number of jobs created by a specific initiative should not be included unless they are significant. In several of the releases, tested participants were quick to do the math and commented on how costly jobs are when there is a multi-million dollar government investment. Instead, the net jobs and economic impact of similar initiatives could be included in section C as a means of emphasising job creation efforts.

As well, while it is recognized and expected that politicians will include a quote in a news release or other materials, it was seen as much more credible if others involved in the announcement or if third parties with no vested interest were given an opportunity to comment on the initiative.

## Terminology

In several of the general public groups, respondents were asked what their top-of-mind response was to a variety of words. While none of the words received an extremely negative reaction, there was a clear indication in this exercise and throughout the groups that any umbrella name or terminology designed to include the wide range of Government of Canada innovation initiatives should be simple and direct, for example, "A Strategy for Economic Innovation" or "Encouraging Research and Development in Canada".

While the slogans "Smart Canada", "Innovation" and "Research Means Business" received mixed reviews, all could be used to communicate the innovation agenda if there were sufficient time and resources to brand them and create a clear understanding among Canadians about what they mean.

The following is a summary of the general public's reaction to the terms that were tested.

- ◆ **Innovation.** For the most part, "innovation" has a positive connotation although some view it as too vague and too broad to have a direct and clear meaning. Top-of-mind responses included: creativity, new products, cutting edge, to be the first, to create, new solutions, universities, and action. "Economic innovation" has a much more direct meaning (e.g., research and development to improve the economy).
- ◆ **Research and development.** Unlike "innovation", the term "research and development" has a clear business connotation. For many participants, it means



developing new products to sell, and is clearly tied to the economy in this way. Other top-of-mind responses include: “grants”, “not enough being done”, “necessary for the future”, “globalization”, “high cost”, “the economy”, and “new products”.

- ◆ **Science and technology.** For some, “science and technology” is viewed as the precursor to “research and development”. It is considered the base that research and development is conducted on. Other top-of-mind responses include: “the brain drain”, “not enough being done”, and “knowledge”.
- ◆ **Productivity.** The word “productivity” receives mixed reviews, with some seeing it as a negative term, i.e., “more work for individuals”, while others see it as a positive term, i.e., “increased competitiveness”. Top-of-mind responses include: “sum of individual efforts”, “better”, “cheaper”, “faster”, “doing more for less”, and “exports”.
- ◆ **Smart Canada.** “Smart Canada” and its French equivalent were seen negatively as “government buzzwords” or “propaganda slogans”. Responses varied from: “it doesn’t mean anything” to “it means we are strong in natural resources”. Some questioned the positioning and asked the question “is there a Dumb Canada”?
- ◆ **Innovaction.** Again, this is seen negatively as a buzzword or slogan. While most people make the connection to a participation-type approach to innovation, it isn’t clear how “innovaction” would involve the general public to the same extent as “participation”. One participant commented on its appropriateness for government, since the word “inaction” appears prominently. Top-of-mind responses include: useless buzzword, to take action, and to innovate.
- ◆ **Research means business.** This received fairly neutral responses, with several participants noting that while it is true, it doesn’t really say that much. Other top-of-mind responses include: high costs, grants, partnerships, productivity and competition.

## APPENDIX I – MOST POSITIVE SECTIONS OF “*MAKING CANADA MORE INNOVATIVE*”

Note: The majority of participants considered the direction and initiatives outlined in this short paper positive steps for the Government of Canada to take. This paper was tested following the Federal Budget in Vancouver and Calgary. The areas considered most positive are highlighted in bold and italics. There were very few negative comments associated with the paper.

### “MAKING CANADA MORE INNOVATIVE”

In today's knowledge economy, our ability to *create ideas and turn them into new products and services* is a vital ingredient to improved productivity and a high standard of living. Investments made now in innovation will pay off in the future and ensure Canada's quality of life.

Canada faces three fundamental innovation challenges:

- ♦ increasing our capacity to create new knowledge;
- ♦ applying the transformative power of new technologies; and
- ♦ bringing our ideas to market more quickly than ever before.

Meeting these challenges means transforming our entire economy into one of innovation and excellence. It means *investing in knowledge and the research base*, a leading-edge information infrastructure, *and in people's skills and education*. It means becoming more creative and entrepreneurial in turning ideas into winning products and processes and into new high-growth businesses. *Supporting this kind of entrepreneurial energy* and growth requires a constant effort to rejuvenate the business climate through better access to risk capital and business know-how; competitive cost structures and taxes, modern business laws, and *open access to global markets*.

This is why the government continues to deepen the economic game plan and vision first set out in the 1994 Jobs and Growth Agenda. In order to make Canada a more innovative and productive economy *the government is accelerating its investments in knowledge and innovation*.

The Government is increasing its support for research by helping to update our research facilities through the Canada Foundation for Innovation, and by creating exciting new opportunities for our researchers through the new Canada Research Chairs program. It has created Genome Canada, a new non-profit corporation, which will establish five new genomics research centres one each in



BC, the Prairies, Ontario, Quebec, and Atlantic Canada. It is increasing its support, through PRECARN, for collaborative research in such high-growth areas as intelligent systems and e-business. And, it is creating a new *technology fund for sustainable development*.

Canada already has an advantage in its highly educated workforce and our spending on education is among the highest in the world. In order to help expand access to higher learning, the Government is increasing the tax exemption on scholarships and bursaries from the current level of \$500 to \$3,000.

Making Canada a leader in today's new economy also requires that we continually improve our business climate, ensuring that it is conducive to innovation, investment and entrepreneurial activity.

This is why the Government places a strong emphasis on sound fiscal management and why it is *providing a five-year tax reduction strategy*. There are three parts to the new tax strategy.

**Corporate tax reform.** With improved finances, the Government can now begin to re-examine the competitiveness of the corporate tax system - narrowing the gap between Canada and the US and lowering the rate for emerging businesses by:

- ◆ reducing corporate tax rates from 28% to 21% within five years; and
- ◆ reducing the tax rate on small business income between \$200,000 and \$300,000 from 28% to 21%.

Entrepreneurs and risk taking. Budget 2000 introduces several measures to help improve access to capital for entrepreneurial start-ups and high-growth businesses:

- ◆ postpones tax on capital gains on shares acquired under qualifying stock options to when shares are sold;
- ◆ lowers the capital gains inclusion rate from three quarters to two thirds; and
- ◆ allows for the tax-free rollover of capital gains on qualified investments from one small business to another.

**Personal tax cuts.** Budget 2000 provides Canadians with broad-based tax relief, building on the personal tax cuts provided in previous years. In particular, the government is:

- ◆ restoring full indexation;
- ◆ reducing the middle income tax rate from 26% to 23%;
- ◆ gradually eliminating the 5% surtax; and

- ♦ raising the floor at which the middle and top tax rates begin to apply.

In addition, the Government is providing a new \$80 million equity infusion to the Business Development Bank of Canada to provide entrepreneurial SMEs, particularly those in high-growth, knowledge industries, with better access to capital financing. And, the extension of the Community Futures Development Corporations will help support entrepreneurs in rural Canada.

These new investments and tax reforms will help make Canada a leader in the new knowledge economy. They will *make Canada a more innovative and entrepreneurial place to live, work and invest.*

However, Canada's innovation and productivity challenges are not the Government's alone. *Canadian businesses must also be more creative, improve their performance* continually, be more entrepreneurial, and generate new products, ventures and partnerships.



**NOTE:** If the most positive statements are summarized in one document it could read like this and would closely correspond to the general public's main priorities vis-à-vis the innovation agenda.

"In today's knowledge economy, Canada's ability to *create ideas and turn them into new products and services* is vital to improved productivity and a high standard of living.

This requires *investing in knowledge and the research base*, a leading-edge information infrastructure, *and in people's skills and education*. It means supporting Canada's entrepreneurial energy and *opening access to global markets*.

To make Canada a more innovative and productive economy *the government is accelerating its investments in knowledge and innovation* and it is creating new innovation initiatives like a **repayable** technology fund for sustainable development.

As well, the government is focussing on sound fiscal management and is *providing a five-year tax reduction strategy* that includes *corporate tax reform* and *personal tax cuts*.

However, Canada's innovation and productivity challenges are not the government's alone. *Canadian businesses must also be more creative* and must work to *continually improve their performance* as well.

The combined efforts of governments and business, new investments, and tax reforms will help make Canada a leader in the new knowledge economy. They will *make Canada a more innovative and entrepreneurial place to live, work and invest.*"

## APPENDIX II – FOCUS GROUP COMPOSITION

### Phase One Focus Groups (General Public and Business)

The general focus groups were segmented by the participant's level of confidence in the economy. The business groups included representatives from small and medium businesses who are very or somewhat involved in their company's long-term decision-making process. The table below provides a summary of the final schedule and composition of the groups.

Location	Date/Timing	Composition
Toronto	Feb 22 – 6PM	High Confidence in Economy
Toronto	Feb 22 – 8PM	Business Representatives
Montreal	Feb 22 – 6PM	High Confidence in Economy
Montreal	Feb 22 – 8PM	Business Representative
Trois-Rivières	Feb 23 – 6PM	High Confidence in Economy
Trois-Rivières	Feb 23 – 8PM	Low Confidence in Economy
Moncton	Feb 23 – 6PM	Low Confidence in Economy
Moncton	Feb 23 – 8PM	Business Representatives
Vancouver	Mar 2 – 6PM	High Confidence in Economy
Vancouver	Mar 2 – 8PM	Low Confidence in Economy
Calgary	Mar 3 – 6PM	Business Representatives
Calgary	Mar 3 – 8PM	High Confidence in Economy



### **General Public Recruitment Screener**

#### **(Low and High Confidence in the Canadian Economy)**

The general public groups were recruited using the following screener:

“Please tell me how confident you are that Canada will succeed in the new knowledge based economy and the quality of life in Canada will continue to improve over the next 10 to 20 years. Please respond using a scale of 1 to 10 where 1 means you are not at all confident and 10 means you are very confident.

Low Confidence = a response of 1,2,3,4,5,

High Confidence = a response of 6,7,8,9,10

### **Business Recruitment Screener**

The business groups were recruited using a screener as follows:

By Business Size: A mix of representatives from businesses with fewer than 25 employees, 26 to 99 employees and 100 employees or more.

By Business Sector: A mix of sectors (excluding retail).

By Role in Company: Those who say they are very or somewhat involved in their company's long term decision making process.

## APPENDIX III - MODERATOR'S GUIDE

### INDUSTRY CANADA - VIEWS ON INNOVATION

#### MODERATOR'S GUIDE

February 2000

#### INTRODUCTION

Explain to participants:

- Introduction to the Angus Reid Group
- length of session (2 hours)
- taping of the discussion
- one-way mirror and colleagues viewing in back room
- results are confidential and reported in aggregate/individuals are not identified/participation is voluntary/
- the group is being sponsored by the Government of Canada
- the role of moderator is to ask questions, timekeeper, objective/no vested interest
- role of participants: not expected to be experts, no need to reach consensus, speak openly and frankly about opinions, no right/wrong answers

Get participants to introduce themselves and their occupation/hobbies etc.

#### WARM UP

- ◆ Most important issue facing Canada over the next 5 to 10 years?

#### ECONOMIC ISSUES

- ◆ Most important issue facing Canadian economy over the next 5 to 10 years?



Are you concerned over globalization? What are we doing as a country to address this issue?

Are you concerned about Canada's ability to be a leader/keep pace in the knowledge-based economy? Are we keeping up now? Are we staying ahead? Are we falling behind?

- ◆ What is the link (is there a link?) between quality of life, standard of living, and the economy in Canada?

## COMMUNICATIONS

- ◆ If you heard that the Government of Canada was planning to introduce a "Strategy for Economic Innovation" what would you expect?
- ◆ What kind of initiatives would the government include in the strategy for economic innovation? What would you include?
- ◆ What do you expect to hear from the federal government re: the economy, innovation, R&D, etc...?
- ◆ Who should the Government of Canada partner with to encourage innovation, R&D, etc... in Canada?
- ◆ Should they inform the public about what they are doing? If so how?
- ◆ What would you read?
- ◆ Where do you get information about these issues now?
- ◆ What sources do you trust?

## REACTION TO INNOVATION INITIATIVES

Review of "innovation" announcements. Participants will be given 5 initiatives to review.

Asking respondents to:

- ◆ Conduct Red-Green Pencil test. I would like each of you to read these information sheets (HANDOUT ONE AT A TIME) and use a green marker to highlight the parts of each announcement that you like and use a red marker to highlight any sections or any parts that you do not like. (Give respondents 15 to 20 minutes to do this.)

- ◆ Identify common links/themes. *What do you think are the key messages/themes that link the various initiatives?*

Rank announcements. *What do you think are the most positive/ the most negative initiatives? Why did you choose X as the best initiative? What are the benefits/positive that you like about your number one ranked initiative? What is it that you do not like about your lowest ranked initiative?*

Group discussion:

- ◆ What is the overall reaction to the package of initiatives?

If you read/saw on the news that the Government of Canada had done all of these initiatives what would your overall impression be? Positive? Negative?

- ◆ What is the government's rationale for the package? Why do you think the government might announce a package like this?

### **Conduct Red-Green Pencil Test with Newspaper Articles.**

#### **TERMINOLOGY**

- ◆ What is the first thing or words that comes to mind when you hear the words....  
(Please write them down.)
- ◆ What is the most positive thing that comes to mind when you hear the words ... ?  
(Please write them down.)
- ◆ What is the most negative thing that comes to mind when you hear the words... ?  
(Please write them down.)

Terms to be tested:

- ◆ Innovation



- ◆ Productivity
- ◆ Research and Development
- ◆ Science and Technology
- ◆ Smart Canada
- ◆ Innovation
- ◆ Research Means Business/ La Recherche : Une Question d'Affaires
- ◆ What would you call a Government of Canada lead strategy to encourage business to get more involved with R&D and encourage young Canadians to study and work in technology/science in Canada? A strategy for \_\_\_\_\_?

## CONCLUSION

- ◆ Do you have any final comments regarding what we've discussed this evening?

## APPENDIX IV— TOP LINE SUMMARY OF QUANTITATIVE SURVEY

### 1. What do you think needs to be done to help the Canadian economy continue to grow over the next ten years?

TOTAL MENTIONS	TOTAL
BASE (Weighted) : All respondents	1516
BASE (Unweighted): All respondents	1516
Tax cuts/ have flat rate/ tax reform	29%
Job creation/ maintenance/ less downsizing/ favor business	21%
More government investment – general	18%
More money for education/ ease financial burden on students	14%
Control government spending/ less waste/ smaller government	9%
Reduce the debt/ deficit/ balance budget	6%
Maintenance of Healthcare system/ more money for	5%
An improved/ new government/ more productive/ efficient/ more accountable	4%
More trade/ import/ export/ strong world market	4%
Lower gas/ energy prices/ control of oil industry	4%
Better jobs/ higher wages/ higher minimum wage/ more benefits	4%
Favor research and development of technology/ more technology	3%
Improve the value of our dollar, currency	2%
Lower/ keep interest rates low	2%
Less government involvement/ bureaucracy/ red tape	2%
Stop the Brain Drain/ keep employees and businesses in Canada	2%
Keep a cap on/ reduce inflation/ cost of living/ prices	2%
Welfare system reform/ make it harder to get/ keep people off	2%
Encourage other countries to invest in Canada	1%
Growth in population/ broader tax base/ more immigrants	1%
Encourage people to buy Canadian products/ invest in Canada	1%
Reduce foreign lending/ aid/ curb immigration	1%
Environmental issues/ programs	1%
Nothing	1%
Other	12%
Don't know	14%



2. When you think about the word "innovation", which of the following two statements comes closest to your own personal opinion? Innovation to me means research and development and new ideas that will help address the...

	TOTAL
BASE (Weighted) : All respondents	1516
BASE (Unweighted): All respondents	1516
ECONOMIC challenges that Canada faces today	59%
SOCIAL challenges that Canada faces today	33%
Both of them	6%
Don't know	1%

3. Now, how much of a priority should each of the following be for the Government of Canada? Please respond using a scale from 0 to 10, where 0 means it should be a "very low priority" and 10 means it should be a "very high priority".

	(10) Very high priority	9	8	7	6	(5) Neutral	4	3	2	1	(0) Very low priority	Don't know	TOPBOX & LOWBOX SUMMARY		
													High Priority (Top4Box)	Neutral (Mid3Box)	Low Priority (Low4Box)
Developing a strategy to increase economic innovation in Canada	24%	11%	27%	16%	8%	9%	2%	1%	1%	0	1%	1%	79%	19%	2%
Developing a strategy to stop the "brain drain", that is, skilled people leaving Canada to work in other countries	37%	13%	18%	10%	5%	7%	3%	2%	1%	1%	3%	0	78%	15%	7%
Developing a strategy to increase university-related research and development in Canada	21%	9%	24%	19%	10%	11%	2%	1%	1%	0	1%	1%	73%	24%	3%
Developing a strategy to increase business-related research and development in Canada	17%	7%	25%	17%	11%	14%	4%	2%	1%	0	1%	0	66%	28%	5%
Developing a strategy to increase the impact of federal research institutes and laboratories	13%	6%	21%	20%	13%	14%	4%	3%	2%	1%	2%	1%	60%	31%	8%

**4. For each of the following statements, please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.**

	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Don't know	TOPBOX & LOWBOX SUMMARY	
						Agree (Top2Box)	Disagree (Low2Box)
It is important that Canada remain as technologically advanced as other countries	1516	1516	82%	16%	1%	98%	2%
It is important that Canadian businesses are innovative, and continue to develop new products, services and ideas	76%	23%	1%	1%	0	98%	1%
University research makes a strong contribution to Canada's economy	41%	47%	9%	2%	2%	88%	11%
Canadian companies can become more competitive by hiring more scientists and researchers	33%	52%	11%	3%	1%	85%	14%
If Canadian businesses fall behind in terms of their ability to be innovative and to develop new products and services, it will lead to a lower standard of living for all Canadians	48%	37%	12%	3%	1%	84%	15%
I am concerned about Canada's ability to be a leader in the knowledge-based economy	36%	42%	16%	5%	1%	78%	21%
The Canadian economy is still based on natural resources and has not made much progress in adapting to the new knowledge-based economy	20%	43%	26%	9%	2%	63%	35%

**5. Now, thinking about research and development, and economic innovation that is, the ability of a country and its businesses to create new products, services and ideas - who do you think should be MOST responsible for making sure that Canada keeps pace with other countries?**

	TOTAL
BASE (Weighted) : All respondents	1516
BASE (Unweighted): All respondents	1516
The Government of Canada	45%
Large private-sector businesses	29%
Small private-sector businesses	10%
Universities and community colleges	13%
Don't know	2%



**6. Thinking about research and development, and economic innovation that is, the ability of a country and its businesses to create new products, services and ideas - which of the following do you think is the BEST way to make sure that Canada keeps pace with other countries?**

	<b>TOTAL</b>
BASE (Weighted) : All respondents	1516
BASE (Unweighted): All respondents	1516
Tax cuts for Corporations that do research and development	19%
Government investments in Businesses that do research and development	15%
Government investments in Universities that do research and development	23%
Government investments in federal government laboratories that do research and development	5%
Government investments in Young People who want to study in science and technology fields	36%
Don't know	2%

QUEEN HC 120 .T4 V5 2000 c.2  
Angus Reid Group  
Views on innovation in Canada

INDUSTRY CANADA/INDUSTRIE CANADA



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