

# Survey and Focus Groups - Summer 2013

## Executive Summary

Submitted to  
Privy Council Office  
POR@PCO-BCP.gc.ca

Prepared By  
Léger

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THE RESEARCH INTELLIGENCE GROUP

# **1. Executive Summary**

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Léger is pleased to present the Privy Council Office with this report on findings from a series of focus groups and a quantitative survey aimed at capturing Canadians' perceptions of current events that are relevant to the Government of Canada.

This report was prepared by Léger who was contracted by the Privy Council Office (contract number 35035-135054/001/CY awarded July 12<sup>th</sup>, 2013).

## **1.1 Background and Objectives**

The Communications and Consultations Secretariat of the Privy Council Office (PCO) provides advice and support to the Government of Canada, the Clerk of the Privy Council and to departments/agencies on matters relating to communications and consultations, and facilitates the coordination of the Government of Canada's activities in these areas. One tool used in order to fulfill its mandate is public opinion research.

PCO mandated Léger to conduct a survey and focus groups to explore in more detail the concerns and the perceptions of Canadians on current events that are relevant to the federal government.

Through the use of a survey and focus groups, PCO wanted to explore the perceptions of Canadians on the state of current events, including for example, their opinions on the current state of the economy. This input is needed because complex issues are often difficult to communicate to the Canadian public in a manner that is easily and clearly understood. By carrying out this research the Canadian Government will be able to ensure a better understanding of the views and concerns of the public and to develop effective communications strategies and products.

## **1.2 Methodology**

### **Qualitative Research**

A series of twelve (12) focus groups was held during the course of this research. At each location, groups were comprised of Canadians aged 18 and over, containing a good mix of gender as well as ethnic and educational backgrounds. In addition, groups were split according to income categories. One group in each location was held with participants who have an individual income of less than \$75,000 (or a family income of less than \$100,000), while the other was held with those who have an individual income of \$75,000 or more (or a family income of \$100,000 or more). All participants were also head or co-

head of households. The schedule and locations of the groups are presented in the table below.

Location	Date	Time	Language
Moncton, NB	Wednesday, August 7	1st group: 5:30PM-7:30PM 2nd group: 7:30PM-9:30PM	English
Quebec City	Thursday, August 8	1st group: 5:30PM-7:30PM 2nd group: 7:30PM-9:30PM	French
Vancouver, BC	Monday, August 12	1st group: 5:30PM-7:30PM 2nd group: 7:30PM-9:30PM	English
Rosetown, Sask.	Tuesday, August 13	1st group: 5:30PM-7:30PM 2nd group: 7:30PM-9:30PM	English
Mississauga, ON	Wednesday, August 14	1st group: 5:30PM-7:30PM 2nd group: 7:30PM-9:30PM	English
London, ON	Thursday, August 15	1st group: 5:30PM-7:30PM 2nd group: 7:30PM-9:30PM	English

Twelve (12) participants were recruited for each focus group, ensuring that a minimum of 8 to 10 recruits attended. All participants were recruited over the phone using a recruitment screening questionnaire, presented in Appendix B. Participating individuals were given a \$75 cash incentive to compensate them for their time and cover basic travel expenses.

### Quantitative Research

The quantitative portion of the research was conducted over the phone. Fieldwork for the survey was held from August 7<sup>th</sup> to 21<sup>st</sup>, 2013. The national response rate for the survey was 19.9%. Complete call dispositions are presented in Appendix A. A pre-test of 30 interviews, 15 in each official language, was completed on August 6<sup>th</sup>, 2013. Survey interviews lasted 6 minutes on average.

Because priorities for the federal government may vary greatly by region, a larger sample size was necessary to ensure proper regional representation. In total, 3,000 adult Canadians were interviewed in all regions of the country. The national margin of error for the survey is +/- 1.8% in 19 times out of 20. The complete survey questionnaire used during fieldwork is included in Appendix D.

Survey data were weighted by age, gender and region to ensure that they were fully-representative of the Canadian adult population. Details regarding the weighting

procedures can be found in Appendix A. Detailed statistical tables are provided under separate cover.

### **1.3 Overview of Qualitative Findings**

#### **Top-of-Mind Priorities for Canadians**

When asked to identify what the Canadian Government's main priorities should be, participants from all regions identified job creation through a strong economy as their main priority. This finding was consistent across regions. Various aspects of natural resources development were also consistently listed as a national priority. Mostly, participants wanted Canada's natural resources to be developed in a way that fostered economic growth while keeping in mind the need to protect the environment and keep resources available for future generations.

More controlled government spending and accountability for that spending were identified as key priorities in most groups. Although participants talked about keeping overall spending under control to keep taxes lower, it was Canadian Senators' spending that generated most discussion due to recent media coverage.

#### **State of the Canadian Economy**

Overall, most participants felt that the Canadian economy has done better than that of most, if not all, other countries during the severe economic downturn of 2008 and 2009. While participants mainly agreed that Canada did better than most, they also generally agreed that the national economy remained fragile. Global instability, with Greece being an oft-cited example, in part created this sense of uncertainty regarding the economy. There was a sense among some participants that the American economy was getting stronger, but they remained cautiously optimistic.

While fostering economic growth and creating jobs was the top priority across all regions, views of the current state of the affairs were less positive east of Rosetown, notably in the two Ontario locations.

#### **Other Key Issues**

Possible changes in the Canadian wireless industry through a new wireless spectrum auction were discussed in all regions. Overall, most participants were favourable to the

idea of allowing new entrants on the Canadian wireless market to instil more competition. They felt that the wireless industry in Canada was not very competitive relative to other countries, with the United States and Europe being cited as examples of competitive markets. Most participants believed that increased competition would lead to lower prices and better service for Canadian consumers.

Recent media coverage regarding the Canadian Senate left a strong negative impression for all participants in every region. The events of the past few months created a sense among participants that overspending or using public money for personal benefits may be widespread, generating a call for increased accountability.

Participants in all regions reported hearing about some large-scale oil pipeline projects in various parts of the country and most were favourable to the two projects that would transport oil from West to East. It made sense to them that Canadian oil would be used across the country. Most participants also felt that transporting oil via pipelines was safer than using other means of transportation such as tankers or trains.

#### **1.4 Note on Interpretation of Research Findings**

The views and observations expressed in this document do not reflect those of the Privy Council Office. This report was compiled by Léger based on the research conducted specifically for this project.

While care and consideration was taken to represent the target audience, findings from this qualitative research (i.e. focus groups) should be considered directional only and results should not be projected as representative of the entire Canadian population. It is intended to provide deeper insight into the underlying reasons for opinions or lack thereof.

#### **1.5 Political Neutrality Statement and Contact Information**

Léger certifies that the final deliverables fully comply with the Government of Canada's political neutrality requirements outlined in the *Communications Policy* of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research.

Additional information

Supplier name: Léger  
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To obtain more information on this study, please email [por-rop@pco-bcp.gc.ca](mailto:por-rop@pco-bcp.gc.ca)