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Views on Current Issues

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Ce rapport est aussi disponible en français.

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Executive Summary

i. Statement of Research Purpose and Objectives

Corporate Research Associates undertook the study *View of on Current Issues* on behalf of the Privy Council Office. The research aimed at gathering opinions and understanding perceptions of Canadian adults regarding current events relevant to the Government of Canada, including innovation, the environment, and culture.

This input was 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, PCO is able to ensure a better understanding of the views and concerns of the public so as to develop effective communications strategies and products.

ii. Summary of Key Findings

A wide range of topics were explored in this research project, including innovation, the environment and culture.

Beginning with **innovation**, overall, participants were supportive of the Government of Canada being involved in innovation in Canada, and understood this concept in a very positive light. The concept of innovation was seen as a Canadian value, and understood to be a new, progressive way of doing things that involves an element of creativity.

Participants believed that the Government of Canada plays a pivotal role in ensuring innovation happens in Canada, from playing a role in incubating and financing, to supporting, and promoting its development, as well as in sharing its successes. When asked to choose between helping to create the conditions for innovation to thrive in Canada or bringing in more innovation and experimentation into government, participants generally preferred the former. Participants' awareness of what the federal government is currently doing on innovation was virtually nonexistent. That said, when asked, there was strong support for the government offering subsidies to support innovation, rather than providing tax cuts or investments, particularly for smaller organizations. In terms of sectors, participants favoured assistance for the healthcare sector, given Canada's aging population, along with education, agriculture, forestry, and renewables and clean technology.

Throughout discussions, it was clear that participants were supportive of government involvement in innovation through skills training and support for higher education. These results speak to interest in seeing the government invest in 'homegrown' innovators, by providing the support required and creating the conditions for success. There was also a notable level of support for the government to encourage partnerships between innovative businesses and research institutions.

Regarding **the environment**, participants believed that climate change, the increased use of renewable energy, improved air and water quality, and enhanced recycling programs are among the most



important environmental issues warranting government attention. While many environmental issues were at the forefront of people's minds, knowledge and understanding of some of the terms used to speak of the environment were limited, including 'carbon pricing' which was better known to people as 'carbon tax / taxe du carbone'.

In discussing the concept of carbon pricing, participants believed that the strongest argument in favour of implementing such an idea is the reduction of greenhouse gas emissions and using the proceeds of the tax to fund new investments for green technology. To some extent, carbon pricing was believed to encourage organizations to innovate and find permanent solutions to reduce their greenhouse gas emissions. There was general agreement that a price on carbon will lead to a healthier environment, in that it makes it more expensive to pollute and less expensive to operate cleanly, thus encouraging companies to find innovative solutions to pollute less. It was also considered key to the clean energy economy of tomorrow and a way for Canada to do its part in the global fight against climate change. In general, there was support for strong action on climate change now for our children and future generations.

There were some concerns with putting a price on carbon. Specifically, the flight risks associated with overtaxing corporations was a top preoccupation. At the same time, participants expressed concern that a price on carbon could make Canada less appealing for foreign investment as well as making Canadian businesses less competitive on the global stage. There was also a perceived risk that any additional operating costs resulting from carbon pricing would be redirected to customers, thus reducing the population's buying power.

Awareness of the cap and trade system was low although it was considered a good tool to measure Canada's performance in reducing greenhouse gas emissions, but not enough of a motivator to lead to innovative solutions. While the idea of having a maximum level of greenhouse gas emissions was appealing to Canadians, as it sets a performance objective that can be revised downwards, it was not seen as enough of an incentive to motivate organizations to find ways of reducing greenhouse gas emissions. The lack of clear understanding of the carbon tax and the cap and trade system led to participants being unable to clearly articulate which they preferred.

When shown the current situation in Canada and the variances across provinces, it was clear that there was little to no awareness of the carbon pricing models used in Canada, and participants were under the impression that it was implemented in every province. Knowing this, there was a clear desire for all provinces to take part and bear some of the responsibilities to address climate change. While there was a perceived role for the Government of Canada in implementing a national carbon pricing strategy, its desired involvement was unclear. That being said, participants considered that the Government of Canada should establish carbon pricing guidelines and act as a watchdog, while provinces and territories would be responsible for the development and implementation of the carbon pricing strategy in their jurisdiction. This would ensure that actions are adapted to each province's unique natural resources and economic landscape.



There was a strong desire that the funds collected from applying carbon pricing be reinvested to offset the negative impacts of pollution, specifically in the area of clean energy development, or in encouraging the production of environmentally-friendly consumer goods.

In some groups there was a brief discussion related to Asbestos, and findings reveal that Asbestos was considered as posing a health risk, and as such there was support for banning its use in Canada.

Turning to **culture and heritage**, participants believed that Canadian culture is broadly defined by its people, places of culture, and forms of cultural expression. Indeed, discussions revealed that Canadian culture is commonly defined by the various forms of artistic expression, such as music, performing arts, and films. It was also commonly associated with places of culture, including museums, libraries, and theatres, as well as public gatherings and festivals. History, heritage and genealogy were also top-of-mind when thinking of the culture sector in Canada. Our culture was also commonly defined as diverse and multicultural, likely reflective of the Canadian population. At the same time, there was recognition for the role that Aboriginal influences play in shaping culture in this country. Overall, 'people' were viewed as being at the core of what defines Canadian culture. Finally, French-speaking participants considered that bilingualism is a key differentiator of culture in Canada.

Awareness of Canadian content was widespread and its quality was seen as having improved in the past few years. Further, the term 'Canadian content' appeared familiar across locations, and it was primarily associated with Canadian-made artistic or cultural productions, which were commonly described as both diverse and of high quality. That said, there was no consensus as to whether Canadian content is popular or unpopular, or whether it is modern and exciting or boring and outdated. And while there was clear recognition of increasing quality over the last few years, it was still viewed as average at best, with music being deemed as having the best content and quality, followed by television. By contrast, participants were generally critical of the quality of Canadian theatre and film/movies.

While clearly appreciated by participants, there was a sense that Canada's culture is threatened by a lack of proper funding and recognition from the public and institutions alike, and there was a desire for Canadian culture to receive increased funding. With declining public-sector support, there was a perception that the cost of accessing culture has increased, particularly for live performances. At the same time, how culture is consumed has changed with the introduction of the Internet, providing greater access to culture from here and abroad. It was believed that this changing landscape has introduced the pressure for Canadian cultural producers to enhance the product's quality and 'do more with less' in order to compete with American productions. That said, participants felt stretched financially and believed that telecommunications companies should bear the brunt of any tax increase to fund Canadian culture.

There was a clear and recognized need for government support of Canadian content, especially given the impact of increased access to content. Although no specific details were provided, it was believed that the protection of Canadian content is good for the economy and contributes to creating or maintaining jobs in the sector. All in all, there was support for government intervening to support Canadian content to strengthen our Canadian identity, and ensure relevant quality productions are available for Canadian audiences. As a by-product, strong Canadian content was viewed as positioning



Canada favourably on the global scene, thus having positive economic repercussion on other sectors of our economy, such as tourism. There was a desire for the support of smaller cultural initiatives, that truly reflect our Canadian values, rather than those which have already achieved global recognition or 'big name' artists.

In a few locations, discussions were held related to Canadian bank notes. Findings revealed that although there was support for a prominent Canadian woman to be featured on a bank note, it was unclear which one would be most suitable and on which note a woman should appear.

iii. Description of Methodology

From June 21 to September 1, 2016, a total of 20 in-person focus groups were conducted in nine (9) markets, including Prince George, Surrey, Saskatoon, Winnipeg, North York, Toronto, Montreal, Sherbrooke, and Halifax. Between 8 and 10 participants attended each group, totalling 162 participants. Each discussion lasted two hours. A participation incentive ranging from \$75 to \$85 per person was offered based on market requirements.

iv. Directional Nature of Qualitative Research

Qualitative techniques are used in marketing research as a means of developing insight and direction, rather than collecting quantitatively precise data or absolute measures. Due to the inherent biases in the technique, the data cannot be projected to any universe of individuals.

Qualitative discussions are intended as moderator-directed, informal, non-threatening discussions with participants whose characteristics, habits and attitudes are considered relevant to the topic of discussion.

v. Research Costs.

The total contracted value of the research was \$112,509.54 (including HST).



Detailed Research Findings

Research Background

a. Research Purpose

The Communications and Consultations Secretariat of the Privy Council Office (PCO) felt there was a need to explore opinions related to specific complex issues that may not necessarily be easily communicated and readily understood by the general Canadian public, including innovation, the environment, and culture. Ultimately, results from the research will be used to inform communication strategies and products development by the Government of Canada, the Clerk of the Privy Council and various departments or agencies.

b. Research Objectives

In its advisory role, the Communications and Consultations Secretariat of the Privy Council Office (PCO) was interested in better understanding the concerns and perceptions of Canadians on current events relevant to the Government of Canada. As such, PCO commissioned Corporate Research Associates to conduct a series of focus group discussions across the country with adult Canadians.

Research Participants

To achieve the study objectives, a total of twenty (20) in-person focus groups were conducted (14 in English and 6 in French) in nine locations across Canada from June 21st to September 1, 2016. The following outlines the numbers and locations of groups conducted:

- 2 English focus groups in Prince George, BC, on June 21, 2016, with 16 participants in total;
- 2 English focus groups in Surrey, BC, on August 9, 2016, with 19 participants in total;
- 2 English focus groups in Saskatoon, SK, on June 22, 2016, with 18 participants in total;
- 2 English focus groups in Winnipeg, MB, on August 10, 2016, with 18 participants in total;
- 2 English focus groups in Toronto, ON, on September 1, 2016, with 16 participants in total;
- 2 English focus groups in North York, ON, on July 6, 2016, with 20 participants in total;
- 2 French focus groups in Montreal, QC, on July 7, 2016, with 19 participants in total;
- 2 French focus groups in Montreal, QC, on August 25, 2016, with 18 participants in total;
- 2 French focus groups in Sherbrooke, QC, on July 20, 2016, with 18 participants in total;
- 2 English focus groups in Halifax, NS, on July 27, 2016, with 19 participants in total;
- Across 9 locations, 181 participants took part in the study.

Participants were recruited to include Canadian citizens 20 years of age or older who have lived in the area where the focus group was held for at least two years and who are the head or the co-head of the household. Each focus group included a mix of age, gender, household income, and education. As is normal practice in market research, those who work in or are retired from specific industries, or who



have someone in their household in this situation, were excluded from the study. These industries include market research, marketing, public relations, media, advertising, communications, political parties, and government department (provincial and federal).

Methodology

- a. **Research procedures:**
 - i. **Type of research sessions:** Moderator-led focus groups across Canada
 - ii. **Number of Research Sessions:** 20
 - iii. **Research Modality:** In-Person Focus Groups
 - iv. **Research Setting or Location:** Cross-Canada in Prince George, Surrey, Saskatoon, Winnipeg, Toronto, North York, Montreal, Sherbrooke and Halifax. Where available, groups took place in a professional focus group facility. In Prince George and Surrey, groups were held in a hotel meeting room with an adjoining observation room.
 - v. **Dates of the Research:** Groups took place from June 21 to September 1.
 - vi. **Sample Source:** Participants were recruited from panel lists and random dialling.
- b. **Recruitment Methods:** Telephone recruiting of the general population was done with a client-approved Screener. Incentives of \$75/\$85 were used for participating in the focus groups. Price variation was dependent on the market.
- c. **Context of Qualitative Research:** Qualitative discussions are intended as moderator-directed, informal, non-threatening discussions with participants whose characteristics, habits and attitudes are considered relevant to the topic of discussion. The primary benefits of individual or group qualitative discussions are that they allow for in-depth probing with qualifying participants on behavioural habits, usage patterns, perceptions and attitudes related to the subject matter. This type of discussion allows for flexibility in exploring other areas that may be pertinent to the investigation. Qualitative research allows for more complete understanding of the segment in that the thoughts or feelings are expressed in the participants' "own language" and at their "own levels of passion." Qualitative techniques are used in marketing research as a means of developing insight and direction, rather than collecting quantitatively precise data or absolute measures. As such, results cannot be extrapolated to the overall population under study.
- d. **Unique Value Provided in Meeting Research Objectives:** Qualitative research allowed for more in-depth exploration of subjects under study than other methodologies, as well as the flexibility to probe and modify the discussion flow based on responses provided by participants.
- e. **Moderator Information:** All groups were conducted by experienced and professionally-trained moderators. For this project, multiple moderators were used based on linguistic capability, the need to conduct multiple groups in multiple locations within the same week and within certain timeframes.



- f. **Group Composition:** All group sessions included participants that represented a mix of age, gender, education, professional status and income with an aim of including individuals who represented the Canadian population. All participants were Canadian citizens, 20 years of age or older and were either the head or co-head of their household.
- g. **Recordings:** Audio and video recording of each group was undertaken to assist with reporting.
- h. **Moderator Guide Changes:** Multiple formal changes were made to the discussion guides throughout the project to meet the Privy Council Office's needs at the time of the group discussions.
- i. **Quality control:**
 - i. Procedures were undertaken to ensure recruited participants met the desired criteria by strictly following an approved recruitment screener.
 - ii. Regular briefings and communications were implemented throughout the fieldwork to ensure moderators were fully apprised of the needs of the client and ongoing findings.



Conclusions

The following conclusions are drawn from the detailed analysis of the study's findings.

Innovation

- ***Innovation was seen as a new, progressive way of doing things that involves an element of creativity. It was seen as a Canadian value.***

The concept of innovation was seen as a Canadian value, and was correlated with ideas of 'newness', 'progress' and 'creativity'. There was a strong aspect of positivism associated with the word, with many associations denoting the idea of moving forward. The concept of innovation also made reference to something different or unique, with an element of exploration and inventiveness. Finally, innovation was often associated with technology and modernity. There was also an element of doing things more intelligently, as well as being leaders in the industry.

A number of examples of Canadian innovation were provided in each location that referenced either a location (research hub) or a scientific discovery. Some innovations were more top-of-mind and mentioned in many locations, such as the BlackBerry cellphone, insulin, power generation technology (nuclear, solar, and wind power) and the Canadarm. A few examples of non-scientific innovations were mentioned, including doctor-assisted death legislation or having elected a young Prime Minister.

In terms of concepts associated with innovation, the term 'R&D' was most widely known and understood, while 'social innovation', 'clean growth', 'inclusive growth', 'knowledge economy' are less widely known among participants.

Participants expressed support for the government investing in the knowledge economy rather than more established sectors, as there was a belief that this type of investment may have a more widespread impact on the economy as a whole.

- ***Participants believed that the Government of Canada plays a pivotal role in ensuring innovation happens in Canada, from playing a role in incubating and financing, to supporting, and promoting its development, as well as in sharing its successes.***

Participants believed that government has a responsibility to finance innovation, but also believed it should play a critical role in supporting its development by providing access to resources, recognizing and promoting successes, and sharing knowledge. It was also perceived as responsible for creating the conditions needed for innovation to blossom, including investing in higher education and training of relevant competencies and in key sectors.

When asked to choose between helping to create the conditions for innovation to thrive in Canada or bringing in more innovation and experimentation into government, participants generally



preferred the former. Creating suitable conditions for innovation to thrive was perceived to provide an opportunity for any business to be able to take advantage of it. It was also believed that the government plays a role in raising Canada's profile on the world stage, thus attracting talent.

Awareness of what the federal government is doing on innovation was virtually nonexistent among participants. That said, when asked, there was strong support for the government offering subsidies to support innovation, rather than providing tax cuts or investments, particularly for smaller organizations. In terms of sectors, participants favoured assistance for the healthcare sector, given Canada's aging population, along with education, agriculture, forestry, and renewables and clean technology.

- ***There was strong support for the Government of Canada to support Canadian innovators and small innovative companies.***

Through exploration of individual exercises and discussion, it was apparent that participants believed the government should support innovators and scientists, with the aim of encouraging invention of new technology, particularly for small companies. This should be accomplished through skills training and support for higher education. These results speak to participants' interest in seeing the government invest in 'homegrown' innovators, by providing the support required and creating the conditions for success. There was also a notable level of support for the government to encourage partnerships between innovative businesses and research institutions.

To a lesser extent, participants believed that the government should encourage highly skilled and educated innovators to immigrate to Canada, though the idea was felt to be an expensive endeavour with uncertain long-term benefits. At the same time, many wondered how this will be executed given their experience of seeing many qualified immigrants currently underemployed. The main perceived benefits of doing this included enhancing our common knowledge and the possibility to learn from global experts, to quickly position Canada as an innovative leader on the world stage, and builds a culture of innovation in Canada.

By contrast, many participants believed that Canada already has a lot of talent that only need support to grow, and by bringing in foreign experts, we limit the opportunities for Canadians. There was a general sense that Canada has been experiencing a brain drain for the past several years. Impressions were primarily based on personal experiences, particularly having heard of healthcare professionals who moved to the United States.

Participants expressed mixed opinions about increasing R&D investments by foreign companies in Canada. While the possibility of bringing in external knowledge, increasing financing of innovation and job creation were appealing, with foreign ownership, there was a perceived risk of business revenues being reinvested outside of Canada. There was also no clear preference between encouraging foreign companies to open facilities in Canada and encouraging foreign companies to buy Canadian companies or parts of Canadian companies. That being said, there was a clear desire for company majority ownership to remain in Canada.



- ***Participants were supportive of the Government helping Canada's small businesses to grow into world leading organizations.***

There were mixed opinions regarding the need to increase the number of small Canadian businesses who grow into world leaders, although it still gathered support. Participants believed that increasingly larger firms would help support the Canadian economy by accessing new markets and increasing jobs, as well as positioning Canada as a stronger economic player. In some instances, it was felt that this approach would increase Canadian innovations, as it would provide small businesses the support to market their innovation. That being said, the difficulty in this approach was felt to be in identifying the small businesses that will become successful on the world stage. At the same time, the possibility of foreign takeover elicited concern.

The Environment

- ***Climate change, renewable energy, water and air pollution, and recycling were top-of-mind environmental considerations, although awareness and knowledge of related terms were moderate at best.***

Climate change, the increased use of renewable energy, improved air and water quality, and enhanced recycling programs were among the most top-of-mind environmental issues warranting government attention. While many environmental issues were at the forefront of people's minds, their knowledge and understanding of some of the terms used to speak of the environment are limited. Indeed, there was limited awareness of the terms, 'clean job/emplois propres', 'green job/emplois verts', particularly among French-speaking participants. Likewise, awareness of other terms was moderate at best, including 'Clean Tech / Technologie propre', 'Green Tech / Technologie verte', and 'Pollution Tax / Taxe sur la pollution'. Awareness of 'Emission Tax/Taxe sur les émissions' and 'Carbon Tax/Tarification du carbone' was higher among English-speaking participants than among those in French locations. By contrast, 'Carbon Pricing /Tarification du carbone' elicited low levels of recall across locations.

- ***While the environmental benefits of carbon pricing were recognized, the economic and health benefits for Canadians were unclear.***

While the name 'carbon pricing' was generally unknown, the concept was familiar to participants under a variety of other names, including 'carbon tax / taxe du carbone' and 'cap and trade'. In fact, these were not only well used terms, but 'carbon tax' was also considered the most familiar and appropriate. No other expression stood out as best explaining the concept of carbon pricing.

The strongest argument in favour of carbon pricing was the reduction of greenhouse gas emissions and the provision of new investments for green technology, using the proceeds of the tax. To some extent, carbon pricing was believed to encourage organizations to innovate and find permanent solutions to reduce their greenhouse gas emissions.



In general, Canadians who took part in the study believed that a price on carbon will encourage companies to find innovative solutions to pollute less. There was general agreement that a price on carbon will lead to a healthier environment, that it makes it more expensive to pollute and less expensive to operate cleanly, and that it will encourage companies to find innovative solutions to pollute less. It was also considered key to the clean energy economy of tomorrow and a way for Canada to do its part in the global fight against climate change. In general, there was support for strong action on climate change now for our children and future generations.

To a lesser extent it was believed that putting a price on carbon is like getting winter tires; it takes a bit of work but once installed you can drive faster and safely. This analogy was, however, perceived as weak, as participants viewed the main benefit of carbon pricing as being the environment, while safety is primarily associated with using winter tires. By contrast, comparing carbon pricing to implementing a charging fee to drop off garbage at the dump or akin to taxing cigarettes in the sense that we price things that are not good for us was deemed a more appropriate comparison.

Although still deemed relevant, the perceived impact of having a national price on carbon on reducing pollution and making the Canadian economy more competitive was unclear. Likewise, the impact a price on carbon will have on improving Canadians' health, and how climate change can be both one of the greatest challenges and opportunities of our time was unclear.

There were some concerns with putting a price on carbon. Specifically, the flight risks associated with overtaxing corporations was mentioned as the top preoccupation. At the same time, it was considered as making Canada less appealing for foreign investment as well as making Canadian businesses less competitive on the global stage. There was also a perceived risk that any additional operating costs resulting from carbon pricing would be redirected to customers, thus reducing their buying power.

- ***Awareness of the cap and trade system was low. It was considered a good tool to measure Canada's performance in reducing greenhouse gas emissions, but not enough of a motivator to lead to innovative solutions.***

There was little awareness of the concept of cap and trade system across locations. That being said, the idea of having a maximum level of greenhouse gas emissions was appealing to Canadians, as it sets a performance objective that can be revised downwards. At the same time, it was not deemed enough of an incentive to motivate organizations to find ways of reducing greenhouse gas emissions, as well as creating uncompetitive market conditions compared with other countries.



- ***Participants felt there is a role for the Government of Canada in establishing carbon pricing guidelines and acting as a watchdog, while provinces and territories should be responsible for the development and implementation of the carbon pricing strategy in their jurisdiction.***

There was little awareness of the carbon pricing models currently used in Canada, and participants were under the impression that it was already implemented in every province. There was a desire for all provinces to take part and bear some of the responsibilities to address climate change. While there was a perceived role for the Government of Canada in implementing a national carbon pricing strategy, the desired involvement was unclear. To adapt to each province's unique natural resources and economic situation, it was felt that the provinces and territories should be involved in executing carbon pricing strategies, with the federal government setting up guidelines and implementing a system of incentives and penalties to encourage provincial participation.

There was a strong desire that the funds collected from applying carbon pricing be reinvested to offset the negative impacts of pollution, specifically in the area of clean energy development, or in encouraging the production of environmentally-friendly consumer goods.

- ***Asbestos was considered as posing a health risk, and as such there was support for banning its use in Canada.***

In Halifax and Sherbrooke, there was a general belief that asbestos is already banned in Canada due to health risks. For this reason, there was support for banning the use of asbestos.

Culture and Heritage

- ***Canadian culture was broadly defined by its people, places of culture, and forms of cultural expression.***

The Canadian culture was commonly defined by the various forms of artistic expressions, such as music, performing arts, and films, to name a few. It was also commonly associated with places of culture, including museums, libraries, and theatres, as well as public gatherings and festivals. History, heritage and genealogy were also top-of-mind when thinking of the culture sector in Canada. Our culture was commonly defined as diverse and multicultural, likely reflective of the Canadian population. At the same time, there was recognition for the role that Aboriginal influences play in shaping culture in this country. Overall, 'people' were viewed as being at the core of what defines Canadian culture. Finally, French-speaking residents considered that bilingualism is a key differentiator of culture in Canada.

While appreciated by participants, there was a sense that Canada's culture is threatened by a lack of proper funding and recognition from the public and institutions alike. With declining public-sector support, there was a perception that the cost of accessing culture has increased, particularly for live performances. At the same time, how culture is consumed has changed with the introduction of the



Internet, providing greater access to culture from here and abroad. It was believed that this changing landscape has introduced the pressure for Canadian cultural producers to enhance the product's quality and 'do more with less' in order to compete with American productions.

- ***Awareness of Canadian content was widespread and its quality was viewed as having improved in the past few years.***

The term 'Canadian content' appeared familiar across locations, and it was primarily associated with Canadian-made artistic or cultural productions. 'Made in Canada' might best describe how residents understood this concept. Canadian content was by far most commonly described as diverse and of high quality. That said, there was no consensus as to whether Canadian content is popular or unpopular, or whether it is modern and exciting or boring and outdated. Most of the examples of Canadian content referred to television shows and musicians. CBC/Radio-Canada was also commonly cited as a pertinent example. Apart from artistic references, Canadian content was defined by such things as hockey and maple syrup.

Despite having improved, the quality of Canadian content was described as average at best, with music being deemed as having the best content, followed by television. By contrast, participants were generally critical of the quality of Canadian theatre and film/movies. Nonetheless, opinions were that the quality of Canadian content across media has improved or stayed the same over the past few years. There was widespread recognition, however, that Canadian cultural productions are under pressure to compete against American productions that enjoy better funding. While English-speaking participants indicated that Canadian content did not influence their choice of the culture they consume, it was recognized, elicited pride and was considered an important component of who we are.

- ***The need for government support of Canadian content was recognized and desired, especially given the impact of increased access to content.***

There was a general impression that the protection of Canadian content is legislated, specifically in terms of broadcasters being required to air a minimum amount of Canadian content in their programming. The sense was that this law benefits many players within the Canadian cultural sector, including performers, producers, and distributors, across all provinces. Although no specific details were provided, it was believed that the protection of Canadian content is good for the economy and contributes to creating or maintaining jobs in the sector. All-in-all, there was support for government intervening to support Canadian content to strengthen our Canadian identity, and ensure relevant quality productions are available for Canadian audiences. As a by-product, strong Canadian content was viewed as positioning Canada favourably on the global scene, and has positive economic repercussions on other sectors of our economy, such as tourism. There was a desire for the support of smaller cultural initiatives, that truly reflected our Canadian values, rather than those which have already achieved global recognition or 'big name' artists.



The significant impact played by the Internet in how people consume culture did not go unnoticed. In fact, it was recognized as having significantly increased access to culture, in terms of the larger amount of culture available at increasingly lower costs. Live streaming service, such as Netflix, and online stores like iTunes, were clearly viewed as having had a major influence in this change. It was believed that accessing American content is easier which supports the need to protect Canadian content, and that the way we consume content is rapidly changing, thus requiring that we modernize to adjust.

The issue of funding Canadian content was not clearly understood and the perceived complexity of the situation may explain participants' hesitations to support the claim that shrinking funding for Canadian content is hurting Canadian artists. As such, there was a perceived need to make sure we support those artists for success, and that a regulatory change is required to expand contributors beyond cable TV providers, when culture is consumed in many other ways. Nonetheless, when the concepts are further explained and discussed, there was support for increasing contributions to Canadian content. There was concern with regulating online content, as it was unclear how it would be applied, and what impacts it would have on consumers and subscribers.

- ***There was support for making telecommunications and foreign companies contribute to funding Canadian content, as long as the incremental cost is not passed on to subscribers.***

Although there is support for increased funding of Canadian content by industry, consumers were reluctant to see subscribers' monthly bill increase to offset the additional contribution. Of four options presented, making telecom and foreign companies contribute, in addition to television broadcasters, was preferred, if the cost is assumed by those companies and not subscribers. The other two options garnered less support, including a voluntary contribution of \$2 on consumers' telecommunication monthly bills, or a mandatory \$3 fee with the purchase of a smartphone, for the cost of having a Canadian content App installed. By contrast, there was some appeal for an online digital portal that brings together Canadian content of all types, with consumers prepared to pay a monthly fee ranging from \$5 to \$15 to access a large amount of high quality Canadian content online.

Canadian Bank Notes

- ***Although there was support for a prominent Canadian woman to be featured on a bank note, it was unclear which one would be most suitable.***

Awareness of the Bank of Canada's intentions to include a prominent Canadian woman on one of the country's bank notes was strong across groups, although support for the idea was mixed. While the intent was laudable, the choice of who to feature will have a significant influence on the perceived value of this change. At the same time, the reasoning behind the initiative must be presented. When asked who, of Sir Wilfrid Laurier featured on the \$5 bill and John A. Macdonald currently on the \$10 bill, should be replaced by the Canadian woman, opinions were mixed. English-speaking Canadians would rather see Canada's first Prime Minister remain on the \$10 bill, while it



was believed that Sir Wilfrid Laurier is an important French-Canadian personality that needs recognition. There was no consensus on the value or drawbacks of replacing Her Majesty Queen Elizabeth by a Canadian woman, although the widespread circulation of the \$20 bill appeared appropriate to feature a woman.

Replacing Canada's landscape images by the image of a woman, thus having both male and female figures on one or more bills, held mixed appeal. It was not viewed as a strong statement of gender equality, nor was it considered offensive for women to be on the reverse side of the bill. Additional suggestions included introducing a new coin to feature the prominent Canadian women, creating a collage featuring multiple women or a mix of males and females, printing special edition bills, or redesigning the currency to have both male and female figures side-by-side.



Detailed Analysis

Current Issues Facing Canada

Across most locations, the discussion began with participants identifying top-of-mind considerations regarding the Government of Canada, as well as national and local issues participants believed the government needs to address.

Top-of-Mind Areas Involving Government

To begin the discussions, in selected locations participants were asked what they considered to be the main issues currently facing Canada that require the Government of Canada's attention. Due to a lack of time, this question was not asked in the last two locations - Montreal and Toronto. A diversity of responses were provided across other locations, though some of the themes were recurring and prevalent across the country, including access to healthcare, education, and affordable housing, improved economy, increased attention to the environment, improved relationships with Indigenous populations, and the services and care available to assist our elderly population.

Participants were asked if they had heard anything in the news days prior to the focus group, regarding changes to the Canadian Pension Plan (CPP). Very few in each group recalled having seen or heard that the CPP contributions and payments would be increased over a set period of time. Even fewer recalled having heard that the CPP contribution would be increased to ensure its long-term sustainability. Others had heard that the changes were not going to be beneficial for anyone nearing retirement, but were positive changes that would benefit individuals who are currently young. In a few locations, particularly in North York, Surrey, Montreal and Sherbrooke, participants were under the impression that recent discussions related to CPP concerned lowering the mandatory retirement age from 67 to 65 years old.

Local Issues

When asked about local issues that would benefit from the Government of Canada's involvement, the following topics were raised. Due to a lack of time, this topic was not discussed in Montreal and Toronto.

- In **Prince George**, the most pressing issues were identified as including the environment, low employment, increased presence of gangs, inadequate prevention programs from kids with addictions, declining social assistance, homelessness, and pollution.
- In **Saskatoon**, responses included poverty, low minimum wage, inadequate services and support for senior citizens, poor drinking water on First Nations reserves, and the need to assist Syrian refugees with language education.
- In **North York**, participants pointed out issues with local school infrastructure, the availability of affordable housing, safety issues with the public transit system, development of the downtown



Relief Line, improvement to the road system, increased funding for sports and music, and affordable childcare. Clearly, public transportation is a top-of-mind issue with residents of North York.

- In **Sherbrooke**, responses included repairs needed to the Armoury, airport improvement and expansion, improving rail safety, improving water quality, especially in smaller communities, and lowering gas prices.
- In **Halifax**, residents were most concerned with affordable housing, the increased incidence of crime, transparency of government spending, lowering taxes, improving healthcare and transportation infrastructure, reinstating the film tax credit, shortages of doctors, employment, and the redirection of funds from the Yarmouth Ferry.
- In **Surrey**, topics mentioned included public transportation shortages, a lack of long-term infrastructure planning, the increasing cost of living, and limited affordable housing that will negatively impact future generations.
- In **Winnipeg**, residents were most concerned with inequalities faced by First Nations people, the need for a better integration of newcomers, the pending acquisition of the Manitoba Telecom Services (MTS) by BCE, homelessness, the inadequate public transportation network, the lack of proper incentive to support entrepreneurship, and the need to improve infrastructure, notably the road system.

Infrastructure Investment

Participants were told that the federal government has set aside money for infrastructure, and they were asked what kinds of projects would make the largest impact on their community, and for them personally.

While a variety of topics were mentioned, public transportation, urban planning, and improved road systems were consistently mentioned across locations. In fact, these topics were most prevalent in larger urban centres. For the most part, there was a desire for more 'livable cities', as well as better access to downtowns from outlying areas via improved public transit systems or better roads.

Other topics were identified in selected locations. For example, the modernization of schools and hospitals was mentioned in North York and Halifax, while better recreational facilities was most top-of-mind in Prince George. Seniors and low income housing was mentioned in Halifax, in addition to more grants for homeowners' renovation. Finally, in Winnipeg, residents expressed an interest for better addiction treatment services.

In Montreal, Sherbrooke, and Halifax participants were asked to share their thoughts on the privatization of some infrastructure, such as airports, ports, and roads, as a means to pay for infrastructure improvements. In all of these locations, there was lukewarm appeal for this idea and a desire for more information. While the thought of increasing infrastructure investments was appealing to most, concerns were raised with security and user safety (particularly for trains and airports), with the level of service offered to users, and with the long-term profitability of this kind of initiative. At the same time, many were not keen on having to pay user fees, especially in instances where a no-cost



option would not be available. Another common concern was the possibility that infrastructure would move to foreign ownership. All in all, this idea was viewed as a more realistic short-term plan than a sound long-term plan.

Many in Montreal and a few in Sherbrooke referenced the Caisse de dépôt light rail transit initiative currently being discussed, and while they appreciated the possibility of an improved public transit system, they wondered about what would happen to existing infrastructure, as it could become redundant.

Defining Innovation

Innovation was seen as a new, progressive way of doing things that involves an element of creativity. It was seen as a Canadian value.

Definition of Innovation

In Prince George, Saskatoon, North York and Montreal, participants were first asked to jot down a few words they spontaneously associated with the concept of innovation, prior to a group discussion. While a diversity of responses were provided, a few ideas consistently emerged across groups. Innovation was generally seen as a Canadian value. Indeed, more than twice as many felt that innovation is a value embraced by the country than those who didn't.

When asked an open-ended question about which words come to mind when they think of the word 'innovation', results found that the words 'new', 'progress' and 'creativity' were commonly associated with innovation. Indeed, there was a strong aspect of positivism associated with the word, with many associations denoting the idea of moving forward.

Further, innovation was perceived to make reference to something new. It was seen as a beginning, the start that leads to change; something fresh and different. Across locations, innovation was often described as a new approach, idea, process or product that improves something that currently exists.

The concept of innovation also makes reference to something different or unique. Innovation was viewed as exploratory, creative, inventive, and imaginative, as well as something that is 'ahead of the curve'. For many, innovation made reference to progress and improvements. It implied being proactive and solution-driven by doing things better, faster, easier, and more efficiently.

Finally, innovation was often associated with technology and modernity. There was also an element of doing things more intelligently, as well as being leaders in the industry.

A number of examples of Canadian innovation were provided in each location that referenced either a location (research hub) or a scientific discovery. Some innovations were more top-of-mind and mentioned in many locations, such as the BlackBerry cellphone, insulin, power generation technology (nuclear, solar, and wind power) and the Canadarm.



Yet other innovations were less commonly cited and reflected local interests, such as the Synchrotron, Innovation Place, nuclear power, R-value, Plastic Wood, computers, the CANDU reactor, Tesla, Bombardier, Orbite Technologies, magnetic transit pass, and juice made with organic waste. A few examples of non-scientific innovations were also mentioned, including doctor-assisted death legislation or having elected a young Prime Minister.

In Surrey and Winnipeg, participants were asked to identify the types of jobs they believed would be created if the Government of Canada were to focus on innovation. A variety of responses were provided, including the following:

- Employment in the medical field;
- Technology-related jobs;
- Design, architecture, and engineering;
- Research-related employment;
- Education jobs;
- Environmental researcher;
- Environmental technology employment; and
- Software development jobs.

Concepts Associated with Innovation

A list of other pre-determined areas tied to innovation were assessed for familiarity and understanding during an individual exercise, prior to being discussed as a group.

The following provides an overview of the level of awareness and understanding of the terms assessed in Surrey, Winnipeg, Montreal, and Toronto.

Social innovation (innovation sociale):

There was a moderate level of awareness of the expression, but understanding of this concept was poor. A variety of definitions were provided by those aware of this term. Specifically, a few participants thought it meant being socially aware of things when coming up with new ideas. Others felt it entailed new ways of looking at social problems, or new ways to engage the community.

When asked where social innovation should stand in terms of government priorities on innovation, most believed that it should be in the top half, as it is intended to benefit society at large, and improve everyone's overall quality of life. At the same time, it was believed that a higher priority should be placed on the innovation geared towards improving quality of life rather than creating jobs, although both were viewed as working hand in hand.

Clean growth (croissance écologique):

Awareness of this expression varied across locations and across groups. This expression primarily meant either developing technology or growing the economy while minimizing the impacts on the environment (being environmentally responsible or conscious), or innovations that specifically focus on reducing pollution (e.g., sustainable energy sources).



Inclusive growth (croissance inclusive):

There were low levels of awareness of this expression across locations, and a diversity of descriptions were provided. A few associated this term to the growth or development that impacts or considers as many groups as possible, or that many individuals or groups are involved in the development; many considered that ethnicity defines the various groups impacted (e.g., First Nations, immigrants). Others believed that it implies quality of life improvements for everyone, regardless of economic status.

Awareness and knowledge of the expression were weaker in the French-speaking groups.

Knowledge economy (économie du savoir):

There was low to moderate levels of awareness of this expression, but low levels of understanding of its meaning, particularly among French-speaking participants. Among English-speaking participants, this expression meant the use of knowledge or education to generate value. At times, it was associated with information technology.

A series of other terms were assessed in Saskatoon, Prince George, North York, and Montreal. Participants' perceived level of awareness and understanding for each expression is described below. A few of the terms assessed during the individual exercise were further discussed as a group, including entrepreneurship, productivity, research hubs, and research clusters.

When asked what types of jobs would be created if the Government of Canada were to focus on the knowledge economy, a diversity of responses were provided including:

- Specialized consultants;
- Data managers;
- HR personnel (to guide employees towards improving their skills);
- Marketing;
- Business analysts;
- Education and training;
- Recruitment officers;
- Researchers;
- Scientists;
- Academics;
- Tech sector; and
- Engineers.

When asked whether they believed that the government should encourage growth in the knowledge economy or in more established sectors (such as manufacturing and natural resources), opinions were generally more favourable towards a focus on improving expertise and focusing on the human capital. While the knowledge economy was viewed as the way of the future, it was also considered as potentially having a significant impact on growing our established sectors. The knowledge economy was also viewed as offering higher pay scale and securing experts that would benefit all sectors of the economy.



Entrepreneurship (entreprenariat):

There was moderate to high levels of awareness of this expression. It was most often associated with self-employment and the creation of a new business. While entrepreneurship was often associated with starting a business and business ownership, it was at times associated with innovation and creativity.

For the most part, entrepreneurship was viewed as tied to innovation, by virtue of the novel approach and creative nature involved in starting a business. From that perspective, many indicated that entrepreneurs are often those who are able to identify a gap in offering, and come up with ideas to fill those needs. In general, participants across locations believed that the government should support entrepreneurship, especially by supporting small businesses, and assisting with exporting. The value of entrepreneurship was described, in part, as job creation for Canadians.

High tech (haute technologie):

There was moderate to high awareness of this expression. It was often associated with innovative technology and advancement, and the use of advanced technology. There was clearly a perception that it entails computers and digital based approaches. Robotics, aerospace industry were examples provided.

Digital economy (Économie numérique):

There was low to moderate awareness of this term. This was defined as the use of digital technology to improve the economy, including such things as online banking or cashless online trade or purchases. Understanding of the concept was minimal in Montreal, despite moderate levels of awareness of the expression.

R&D (Recherche et développement):

There was moderate awareness of this term. Most participants who were familiar with the acronym understood its meaning as research and development, although little more was provided in terms of definition apart from the development of new ideas/products through trial and error. Many others were unfamiliar with the acronym, but recognized the full name when mentioned.

Research clusters (Groupes de recherche):

There was moderately low awareness of this expression. In general, this term was associated with groups of like-minded research individuals or organizations working together towards a common goal. Of note, a few were under the impression that research clusters encompassed market research activities and 'think tanks'.

Research hubs (Centres de recherche):

In most locations, there was moderate awareness of this expression. It was defined as a place or physical location where research or innovation is taking place. In some instances, participants also mentioned that the research hubs brought together groups of researchers and innovators in a common place.

While few residents were aware of the terms research hubs and clusters, a fair number were able to identify examples once the terms were defined as a group of researchers who collaborate on research



(research cluster) and a shared space that encourages collaboration between researchers (research hub). Examples included the Vancouver computer developers community, Waterloo, in Ontario, where many researchers appear to have been establishing themselves, Innovation Place, National Research Council, the Atrium building in Saskatoon, the Winnipeg Health Sciences Centre, the Synchrotron, and many universities, among others.

Opinions were generally positive towards this form of partnership, with many believing that the strength in number and the focused approach of research clusters and hubs provides the right environment to lead to result-oriented research and innovations. As such, it was believed that the federal government should support these initiatives, although not to the detriment of investing in individual researchers or projects, and with careful considerations of the sectors in which it invests. Indeed, in areas with great impact on Canadians, such as healthcare, was deemed of greater value than research that would benefit a commercial enterprise. It was also believed that investing in education would provide the right environment to ensure that our workforce can support the sustainability and growth of research clusters and hubs in Canada.

Productivity (Productivité):

There was moderate to high awareness of this expression. For the most part, productivity was described as producing more with fewer resources. It generally encompasses the amount of work completed and how much a person or organization is able to do. It was at times described as a measure of results compared to inputs.

Participants were critical of the Canadian economy's productivity, particularly for not being a key player on the world stage of innovation, and for its perceived poor and stale economy. Many also mentioned that the Canadian education system is subpar, thus being an impediment to increased productivity of our workforce. While there was appeal for the government supporting productivity, it cannot be done by compromising safety or quality. Suggestions were made to support productivity by financially assisting smaller innovative organizations.

Positioning Canada on Innovation

From a list of five statements describing Canada and innovation, participants were each asked to indicate which three they found most accurate, and the one they believed would be best to encourage foreign innovative companies to move to Canada. Three of the five statements were often selected among the most accurate, including *Canadians are innovative people*, *Canadians are creative people*, and *Canadians are inventive people*. The two other statements, namely, *There is a culture of innovation in Canada*, and *Canada is an innovation nation*, held comparatively less personal appeal, although they were more commonly chosen as potentially having a greater influence on attracting foreign investment, for their wider appeal.

Perceived Benefits and Risks of Innovation

In Prince George, Saskatoon, Surrey, and Montreal, participants indicated that the benefits of innovation included that it increases productivity, improves and elevates people's quality of life, particularly in freeing up time, saves lives, opens new doors and allows Canada to stay competitive on the world stage,



and it contributes to a growing economy and job creation, particularly in knowledge sectors. Convenience and accessibility of services were also mentioned as positive outcomes of innovation. At the same time, it was believed that innovation led to a variety of service channels for things like banking, thus providing choice to consumers based on their personal service preference.

By contrast, participants mentioned that innovation can lead to pollution and be harmful to our environment. For example, disposable diapers have freed up time for parents, but to the detriment of the environment. The same can be said of the Keurig K-cup which enables coffee drinkers to brew a fresh cup of coffee quickly, although the plastic coffee pods are not recyclable. Another example provided entails the introduction of pesticides which have helped stabilize our food production, but have caused concern with their negative impacts on wildlife, such as bees. Innovations, such as LED street lights, were also considered of concern to human health, especially in instances where limited information is available on the side effects of scientific advancements. On a related note, quite a few participants believed that innovation has made people lazier, and thus potentially less creative. Innovation may also have a negative impact on the labour market, by shifting jobs from the manufacturing sector to the knowledge economy. Finally, a few participants pointed out that innovations such as e-commerce and ATMs can lead to fewer personal interactions.

To minimize any negative impacts of innovation, it was believed that the government should help people adapt to change, in part by investing more in training or retraining of employees in industries that are declining due to innovation elsewhere. At the same time, to minimize health or environmental risks associated with innovation, the government should consider a more stringent review process prior to implementing new technology that involves thorough testing for side effects.

Government of Canada's Role in Innovation

Participants believed that the Government of Canada plays a pivotal role in ensuring innovation happens in Canada, from playing a role in incubating and financing, to supporting, and promoting its development, as well as in sharing its successes.

Role the Government of Canada Should Play

Participants in Prince George, Saskatoon, North York and Montreal were asked to indicate what role the Government of Canada should play when it comes to innovation. Not only was government perceived by participants as having a responsibility to finance innovation, but it was also viewed as playing a critical role in supporting its development by providing access to resources, recognizing and promoting successes, and sharing knowledge. It was also perceived as responsible for creating the conditions needed for innovation to blossom, including investing in higher education and training of relevant competences and in key sectors. A suggestion was made to invest in an incubator for young innovators, thus building resources for the future. A few also believed that higher education and broadband Internet should be more accessible to provide everyone an opportunity to thrive. Other support mechanisms included policy improvements to assist with marketing or exporting innovation.



When asked to choose between helping to create the conditions for innovation to thrive in Canada or bringing in more innovation and experimentation into government, participants generally preferred the former. Creating suitable conditions for innovation to thrive was perceived to provide an opportunity for any business to be able to take advantage of it. It was also believed that the government plays a role in raising Canada's profile on the world stage, thus attracting talent.

In Montreal as well as North York, a few participants mentioned that the government should play a role in ensuring that important Canadian companies, such as BlackBerry, continue to be owned and operated in Canada, and that innovations such as the Canadarm, insulin, plastic wood, green energy, agricultural innovations and other new ideas can be generated in Canada.

Most Appropriate Actions and Audiences

Awareness of what the federal government is currently doing on innovation was virtually nonexistent in Prince George, Saskatoon, North York and Montreal. Nonetheless, participants were asked to indicate how they believed that the Government of Canada should support innovation, including by providing tax cuts, subsidies or investments. At the same time, they were asked to identify where the Government should direct its support, including to individual innovators, and small or large innovative companies.

Across locations, there was strong support for the government offering subsidies to support innovation. This approach was far more popular than providing tax cuts or investments, although it was generally believed that subsidies would most benefit smaller organizations.

In terms of audiences, small innovative companies were considered as most deserving of government assistance, closely followed by individual innovators. Large innovative companies trail behind.

Sectors Where Support is Warranted

After having reviewed a list of five statements that speak to sector-specific innovation support, participants in Prince George, Saskatoon, North York and Montreal were asked to indicate which statements they agreed with.

By far, agreement was strongest with the statement, *'Innovation in the healthcare sector will be important given Canada's aging population'*. In fact, all English-speaking and most French-speaking participants are agreeable to this. Participants also generally believed that *'the agriculture sector uses a lot of new technology, and innovation there is important since it could lower the cost of food for Canadians'*, and that *'the clean tech sector is well suited to innovation, and will be a growing industry in coming years'*. Finally, participants were less inclined to believe that *'the arts and culture sector is becoming more and more digital'* and that *'Canada's financial institutions are already successful, so they should use innovation to become world leaders'*, although they did not disagree with these statements.

A group discussion followed the individual exercise, during which participants identified the sectors they believed would most benefit from government support to encourage innovation. For the most part, healthcare and education were consistently mentioned across locations, most notably as these sectors



impact a large proportion of the population. At the same time, forestry, renewable resources, agriculture, food processing, and infrastructure were commonly cited sectors that warrant government support.

Other sectors less commonly mentioned include public safety, robotics, biotechnology, and transportation.

Moonshot Challenges

A moonshot challenge was described to participants in Prince George, Saskatoon, North York, and Montreal, as an ambitious, exploratory and ground-breaking project undertaken without any expectation of near-term profitability or benefits. Examples provided to participants included driverless cars, unmanned aircraft to delivery packages (Project Wing), or a network of balloons traveling on the edge of space, designed to help people connect to the Internet in remote areas or during a crisis situation when traditional Internet sources are unavailable (Project Loon). Reactions were obtained to the idea of the federal government investing in moonshot challenges as a means to support innovation.

There was some appeal for this kind of investment, although most notably for projects that may have a significant impact on society. Participants were not keen to see the government invests in such projects if they are to profit a private enterprise. Although participants recognize the risk associated with this kind of investments, they consider it necessary to foster ground-breaking ideas that may have a significant and lasting impact on society. That said, moonshot challenges were only considered a small component of government investment in innovation.

Government of Canada's Goals on Innovation

There was strong support for the Government of Canada to support Canadian innovators and small innovative companies.

After an individual review of goals and actions that could direct the government's policy development on innovation, a group discussion explored participants' views on the expected outcomes.

There was strong support for the government to '*support Canadian innovators and scientists, so that Canadians can invent new technologies*' and to '*make Canada a global leader in the industries of tomorrow*'. To a lesser extent, although still strongly relevant, residents believed that the government should '*help small innovative companies grow into large world leaders*', as well as '*help existing businesses adapt to the digital world and make use of existing technologies*'.

Participants in all locations, with the exception of Sherbrooke and Halifax, were also asked to indicate their agreement or disagreement with a series of statements that describe the areas government could focus on when supporting innovation. Across locations, there was a strong belief that the government should '*increase skills training so that Canadians have the skills for innovative jobs*'. In fact, of the areas highlighted, this was consistently deemed the most important. There was also strong appeal for '*increased government funding for higher education*'. To a lesser extent, although still among the top



priorities, participants believed that government should *'make broadband and wireless Internet accessible to all rural and low income Canadians'*.

Among other factors, there was a notable level of support for the government *'encouraging innovative partnerships between business and research institutions'*, *'increasing Canada's clean technology market share'*, and *'making Canada the most business-friendly regulatory environment in the world for innovative businesses'*.

Although not deemed among the most critical priorities, other areas of focus elicited strong support, including:

- Increasing government funding for R&D (only asked in Surrey, Winnipeg, Montreal, and Toronto);
- Increasing the number of researchers in the Canadian workforce;
- Growing super clusters, to make Canada a hotbed for cutting edge innovation;
- Encouraging businesses to invest more in R&D;
- Increasing the number of small Canadian businesses who grow into world leaders (only asked in Surrey, Winnipeg, Montreal, and Toronto);
- Increasing business investment in information and communication technologies; and
- Reversing the 'brain drain' by encouraging innovative Canadians and businesses to stay in Canada (only asked in Surrey, Winnipeg, Montreal, and Toronto).

To a lesser extent, participants believed that the government should *'encourage highly skilled and educated innovators to immigrate to Canada'* although they remained somewhat favourable to this idea.

Likewise, opinions were more divided in terms of *'positioning Canada to be a worldwide leader on 5G, the next generation of high-speed Internet'*, *'improving Canada's ranking on the World Bank "Ease of Doing Business" scale'*, and *'increasing R&D investments by foreign companies in Canada'*.

Innovator Immigrants

As mentioned above, participants were lukewarm with the idea of encouraging highly skilled and educated innovators to immigrate to Canada. This was viewed as an expensive endeavour with uncertain long-term benefits. At the same time, many wondered how this would be executed given their experience of seeing many qualified immigrants currently underemployed.

The main perceived benefits of doing this included enhancing our common knowledge and the possibility to learn from global experts, to quickly position Canada as an innovative leader on the world stage, and to build a culture of innovation in Canada.

By contrast, many participants believed that Canada already has a lot talent that only needs support to grow, and by bringing in foreign experts, we limit the opportunities for Canadians. At the same time, it was believed that these experts may not invest themselves in Canada in the long-term, given their personal ties abroad. Additionally, participants considered that securing immigrant innovators and



global experts may take time and be costly. The security threat was also mentioned as a possible concern.

When asked how the government should find innovator immigrants, suggestions were made to actively recruit experts in regions where they congregate, such as Silicone Valley, to actively recruit in universities, to simplify the visa application process and other administrative burden to working in Canada,

Participants were informed that each year, Canada allows a certain number of new immigrants into the country. As such, if the Government of Canada wants to increase the number of innovator immigrants it can either increase the total number of immigrants it allows each year, or keep the overall number the same, but decrease the number of other types of immigrants (e.g., family members of people already in Canada or refugees). A discussion ensued regarding which approach would be best. Overall, opinions were mixed, with only a slight preference for keeping the total number of immigrants the same. That being said, participants noted that they lack information on what criteria would be used to choose innovator immigrants and how the other categories would be reduced to fully assess that option.

At the same time, there was a concern regarding the impact of increasing the total number of immigrants on the Canadian economy and job opportunities for current citizens. That being said, it was mentioned by a few that the number of innovator immigrants would likely be limited, given the need for such specific expertise. Bringing in innovator immigrants was not viewed as having a significant impact on new jobs for those already living in Canada.

Canada's Brain Drain

There was a general sense that Canada has been experiencing a brain drain for the past several years. Impressions were primarily based on personal experiences, particularly having heard of Canadian healthcare professionals who moved to the United States.

Increasing Foreign Investments

As mentioned above, there were mixed opinions about increasing R&D investments by foreign companies in Canada. While the possibility of bringing in external knowledge, increasing financing of innovation and job creation were appealing, with foreign ownership, there was a perceived risk of business revenues being reinvested outside of Canada.

There was also no clear preference between encouraging foreign companies to open facilities in Canada and encouraging foreign companies to buy Canadian companies or parts of Canadian companies. That being said, there was a clear desire for company majority ownership to remain in Canada.

A few examples of where foreign investments can be good or bad for Canada were provided by participants, including on the positive side, Tim Hortons and Wind Mobile, where global ideas and competition were viewed as offering Canadians more choice and lower costs. By contrast, Target was



one example where participants felt that foreign investment was negative overall for the country, by resulting in closed stores, employees being laid off and less competition in the end.

In Montreal, participants were asked to imagine a large business from China buying a large Canadian business in their province. Although most recognized the value in having money invested in the province, they were concerned about seeing the ownership, headquarter, and senior management located outside of Canada. They also questioned the company's long-term commitment to Canada.

Participants in Montreal and Toronto were asked to indicate their level of comfort with four expressions that describe investments by foreign companies. Overall, there was a clear preference for the term, 'international partnership', although opinions were also favourable towards 'international investment' and 'global investment'. By contrast, opinions of the term 'foreign investment' were divided between those who were comfortable with the government using it, and others who were not.

Participants in those two locations were also asked to indicate if they agreed or not with a number of statements related to foreign investment. Overall, the two most compelling arguments supporting foreign investment were that it *'brings in new technology, different perspectives, and innovative ways of doing things'* and that it *'injects more money into Canada, growing the Canadian economy'*. To a slightly lesser extent, participants believed that it *'opens up trade opportunities and markets for Canadian companies in other countries'*, *'provide businesses with money they need to grow and hire more employees'* and *'provides more tax revenue for the Government of Canada'*. In general, participants were divided on foreign investments' capacity to *'keep Canadian companies alive, who might otherwise go bankrupt due to lack of investment'*.

Participants were not aware of the Net Benefit Test. They were informed that the test ensures that a foreign investment will be approved by the Government of Canada only if it is likely to be a net benefit to Canada economically and is not injurious to national security. Most participants were not able to comment on this test without additional information.



Growing Canada Into a World Leader

Participants were supportive of the Government helping Canada's small businesses to grow into world leading organizations.

Growing Canadian Businesses

There were mixed opinions regarding the need to increase the number of small Canadian businesses who grow into world leaders, although it still gathered support. Participants believed that increasingly larger firms would help support the Canadian economy by accessing new markets and increasing jobs, as well as positioning Canada as a stronger economic player. In some instances, it was felt that this approach would increase Canadian innovations, as it would provide small businesses the support to market their innovation.

That being said, the difficulty in this approach was felt to be in identifying the small businesses that will become successful on the world stage. At the same time, the possibility of foreign takeover elicited concern.

Government of Canada's Goal

Participants in Surrey, Winnipeg, Montreal and Toronto were asked if the Government of Canada was setting a goal when it comes to growing Canadian companies, which of five statements would be the best way to describe this goal. Overall, appeal was strongest for two of the statements: *'Grow into world leaders / Devenir des chefs de file mondiaux'*, and *'Grow to become big employers / Devenir de gros employeurs'*. Participants also endorsed the statement, *'Grow to employ 1 000+ employees / Devenir des entreprises de 1 000 employés et plus'*, although to a lesser extent. By contrast, opinions were somewhat unfavourable to the last two statements: *'Growing into billion dollar companies/Devenir des entreprises multimilliardaires'*, and *'Become the next Google or Tesla/Devenir le prochain Google ou Tesla'*.



The Environment

The topics of the environment and carbon pricing were discussed in Prince George, Saskatoon, Montreal, North York, Sherbrooke, and Halifax.

Understanding Environment Terms

Climate change, renewable energy, water and air pollution, and recycling were top-of-mind environmental considerations, although awareness and knowledge of related terms were moderate at best.

Environmental Issues Requiring Attention

To begin the discussions, participants were asked to identify the environmental issues they believed most required the attention of the federal government. Consistently across locations, the increased use of renewable energy, less dependence on fossil fuels, cleaning up the oil sands, and addressing air pollution (carbon emissions) were mentioned among the most important areas that require government attention. Along with that, many mentioned addressing climate change as a pressing government priority.

Water quality was also commonly cited, particularly the protection of our freshwater supplies and the pollution resulting from micro beads found in cosmetic products. The need to increase recycling was another common theme, as a means to reduce household and commercial garbage.

A few in selected locations mentioned agriculture as an environmental priority, particularly in terms of supporting farmers, regulating the use of pesticides and other chemicals, and encouraging sustainable farming. Finally, other mentions heard in selected locations included protecting wildlife, forestry management, and ensuring the safety of the Energy East Pipeline project.

Green Jobs and Clean Jobs

Participants in Prince George, Saskatoon, North York, and Montreal were asked about their awareness and understanding of a number of terms associated with the environment. There was limited awareness of the term 'clean jobs' and moderate awareness and understanding of the expression 'green jobs' across English-speaking Canadians. By contrast, the corresponding terms 'emplois verts' and 'emplois propres' are not commonly used in French-speaking markets.

Clean jobs were described as those leaving a low carbon footprint and benefiting the environment. By contrast, green jobs were seen as helping rebuild the environment (e.g., reforestation), or actively trying to improve the environment. In addition, all jobs related to renewable energy (e.g., solar panel salespeople) were viewed as being in this category.



Different terms were discussed in Sherbrooke and Halifax:

Clean Tech / Technologie propre:

There was moderate awareness of this term. It was most often associated with technology that does not have a negative impact on the environment and does not pollute, such as the electric car. A few associated the term with recycling.

Green Tech / Technologie verte:

There was moderate awareness of this term. In general, green tech was viewed as a production technique that is respectful of the environment, such as wind energy or organic farming. Again, a few were under the impression that green tech encompasses recycling and reusing.

Carbon Pricing /Tarification du carbone:

There was low awareness of this term. Just a few identified this term with the taxation of emitted carbon. Some described it as a 'tax' or 'extra price' without being more specific.

Pollution Tax / Taxe sur la pollution:

There was moderately high awareness of this term in Halifax, but awareness was almost nonexistent in Sherbrooke. In general, those aware of this term defined it as a tax organizations pay towards prevention and pollution cleanup.

Emission Tax/Taxe sur les émissions:

Awareness of this term was high in Halifax, but low in Sherbrooke. French-speaking participants aware of the term defined it generally as a tax on air pollution. English-speaking participants were more specific in saying that it is a tax applied to harmful emissions from businesses or vehicles. Many indicated that the tax is applied to the purchase price of a vehicle.

Carbon Tax/Tarification du carbone:

Awareness of this term was moderate in Halifax, but low in Sherbrooke. French-speaking participants defined this term as a tax on carbon emissions. English-speaking participants offered a variety of opinions, including a tax on carbon emissions, a pollution tax, a tax on carbonated oxygen, a tax on vehicle gas, a tax for carbon footprint, and an environmental fee.



Defining Carbon Pricing

While the environmental benefits of carbon pricing were recognized, the economic and health benefits for Canadians were unclear.

Awareness and Familiarity

As mentioned, the term, 'carbon pricing' was not very familiar to English-speaking participants. Similarly, the name 'tarification sur le carbone' was not well-known by French-speaking participants who were most inclined to recognize the expression 'taxe sur le carbone'.

Following the discussions on carbon pricing, participants were asked to define the concept, in their own words, to explain it to someone who would have never heard the term before. The idea of a 'tax' or 'payment' was consistently mentioned across groups. Other terms currently used by participants to speak of carbon pricing included carbon tax, cap and trade, recycling fee, environmental fee, 'bourse du carbone', 'taxe du carbone', 'émissions à effets de serres',

When asked what alternate name would better define carbon pricing, a few suggestions were provided, with 'carbon tax' being the most commonly cited. Some of the suggestions included, 'pollueur payeur', 'compensation des émissions du carbone', 'pénalité à la pollution', 'carbon tax', 'carbon free', 'output tax', 'carbon footprint free', 'carbon credits', and 'environmental tax'. The expression 'pollution tax' was viewed as encompassing more than green gas emissions. In addition, the term 'tax' held a negative connotation as a penalty, rather than an incentive to improve, although some believed that it would help convey the idea of paying for green gas emissions. At the same time, the word 'penalty' sounded more serious than 'pricing' to participants.

In general, there was a sense that both organizations and residents emit carbon, though it was believed that businesses produce more carbon emissions than residents. The split was often perceived to be closer to 70 to 80 percent business and 20 or 30 percent residents.

Perceived Positive Impacts

The strongest argument in favour of carbon pricing was viewed as ultimately reducing carbon emissions, thus improving air quality, both by encouraging a reduction in use of carbon, but also by providing a funding option for new, green technology. At the same time, applying restrictions on carbon emission may encourage organizations to find innovative solutions and efficiencies to permanently reduce their carbon emissions. It was viewed as essentially holding individuals and companies responsible to make changes.

A few also saw the impacts on Canada's economic landscape, with the increase of the green technology sector. It was also mentioned that the funds raised through carbon pricing could be reinvested in social programs that benefit all Canadians.



In terms of personal benefits, participants recognized that the initiative will improve their air quality and have a generally good impact on the environment. They saw that as positively impacting their quality of life.

The approach of asking organizations to pay a fee based on their level of greenhouse gas emission was appealing to participants, and appeared to them as a fair approach.

Perceived Negative Impacts

The potential out migration of businesses was one of the potential drawbacks from implementing carbon pricing across Canada according to a few in each location, even among those who support the idea. Likewise, this initiative was deemed as potentially making Canada less appealing as a location for the manufacturing of goods.

At the same time, there was a sense that industry could be less competitive on the global scene for having to pay an additional tax. Some felt that carbon pricing, although making organizations aware of the need for lowering greenhouse gas emissions, does not necessarily push them to do that. Indeed, it was believed that some companies may consider the tax as an operational expense, without recognizing their responsibilities to impact change. In a sense, it may make some businesspeople feel less guilty for polluting, knowing that they are paying a fine for it. Participants indicated that they need to see evidence of success to fully support this approach.

From a personal standpoint, the tax was viewed as possibly increasing the price of consumer goods. At the same time, with businesses being less competitive, some felt that it may affect employment.

Reactions to Proposed Benefits of Carbon Pricing

In Prince George, Saskatoon, North York, and Montreal, participants were asked to indicate to what extent they agreed or disagreed with six statements related to carbon pricing. All of the statements elicited support to varying degrees. Agreement was strongest for three of the statements, namely:

- A price on carbon will encourage companies to find innovative solutions to pollute less.
- Carbon pricing is like charging a fee to put garbage in a dump. The fee pays for the operation of the dump. And the fee encourages people to reduce what they throw away and find new ways to avoid making more garbage.
- Putting a price on carbon/pollution is like taxing cigarettes: we price things that are not good for us.

Opinions were generally favourable or neutral regarding the other three statements:

- Carbon pricing makes it more expensive to pollute and less expensive to operate cleanly.
- Carbon pricing is a market mechanism that will encourage everyone to make cleaner choices.



- Putting a price on carbon is like getting winter tires. It takes a bit of work to buy them and get put on your car, but once you've made the switch, you can drive faster AND safer. When we price carbon we're putting winter tires on our economy - but it's not faster and safer, it's cleaner and stronger.

In some instances, participants indicated that the winter tires analogy did not work well. They believed that the benefit of using winter tires (safety) was not necessarily reflective of the benefits of carbon pricing (healthier environment). Very few suggestions were provided for other alternate analogies to explain carbon pricing, other than comparing it to the junk food tax, or saying that the 'the more you pollute, the more it will cost you'.

In Sherbrooke and Halifax, opinions were sought on a different series of statements. Opinions were largely favourable towards the following statements:

- A price on carbon will lead to a healthier environment.
- A price on carbon will encourage companies to find innovative solutions to pollute less.
- A price on carbon is key to the clean energy economy of tomorrow.
- By putting a price on carbon, Canada is doing its part in the global fight against climate change.
- It's time to take strong action on climate change now for our children and future generations.

The level of support for the three other statements was high, although not as much as for the previous ones.

- A national price on carbon will reduce pollution and make the Canadian economy more competitive.
- A price on carbon will lead to healthier Canadians.
- Climate change is one of the greatest challenges of our time, and also one of the greatest opportunities.

While the statements generally felt credible, none were deemed to effectively address the reasons to implement carbon pricing, and the anticipated benefits for Canada. At the same time, more information on carbon pricing's impact on the Canadian economy was requested by a few to enhance the statement's credibility.



Cap and Trade System

Awareness of the cap and trade system was low. It was considered a good tool to measure Canada's performance in reducing greenhouse gas emissions, but not enough of a motivator to lead to innovative solutions.

Defining Cap and Trade System

Awareness of the cap and trade system was low among focus group participants. Most of those who had heard the expression were under the impression that it referred to a 'ticket' system that organizations could use towards producing greenhouse gas emissions. This was viewed as the only difference between 'carbon pricing' and 'cap and trade system'.

Perceived Positive Impacts

The idea of having a ceiling on greenhouse gas emissions was appealing to participants, as it controls the amount of pollution allowed in any jurisdiction. At the same time, it can be used to measure the success of any plans in place to reduce greenhouse gas emissions.

Perceived Negative Impacts

As with the carbon pricing approach, it was believed that the cap and trade system is not enough of an incentive for companies to reduce their greenhouse gas emissions. In fact, one of the perceived negative impacts is that organizations may decide to move to another jurisdiction to avoid having to pay this fee.

Role of the Government of Canada in Carbon Pricing

Participants felt there is a role for the Government of Canada in establishing carbon pricing guidelines and acting as a watchdog, while provinces and territories should be responsible for the development and implementation of the carbon pricing strategy in their jurisdiction.

Awareness and Perceptions of the Canadian Situation

Awareness of what carbon pricing models are used in Canada right now was low across locations. Participants were shown a map illustrating which provinces have a system in place (BC, Alberta, Ontario, and Quebec) and provided a brief description of what model is used in each province, and how the funds are used.

Most were surprised to find out that not all provinces applied carbon pricing and believed that to be effective, it should be applied nationally. That being said, given each province's differences in terms of their economy and the use of natural resources, it was believed that provinces should play an active role in defining their carbon pricing strategy.



Government's Involvement

Although there was a desire for the federal government to get involved in a national carbon pricing approach, Canadians were unsure of what its role should be. Given their desire for an approach that is flexible and adaptable to each province's unique situation, they believed that the provincial governments should retain some control over how carbon pricing is applied in their respective jurisdiction. As such, there was greater appeal for the federal government establishing national guidelines or minimums rather than implementing a national carbon pricing system for all provinces. Participants also indicated that the government should serve as a watchdog to ensure that provinces participate and reach their goals, by providing incentives and applying penalties.

A few also believed that the government should act as a mentor, by helping interested provinces to develop a plan, as well as informing all of global best practices. It was also mentioned that government should celebrate successes, as a means to inspire change.

How Carbon Pricing Funds Should be Used

Residents were asked how the money raised by the federal government for carbon pricing should be used. In general, there was a strong belief that funds collected for polluting should be reinvested to offset the negative impacts of pollution, most notably in terms of supporting the development of clean energy or consumer goods that are respectful of the environment.

Other less common responses included to reinvest the funds in social programming to assist low-income Canadians, invest in infrastructure such as roads, or providing greater financing to support access to education.

It was mentioned that carbon pricing punishes those who emit carbon dioxide, rather than incent them to reduce their level of pollution. Many felt that this approach does not provide a solution to ensure the reductions in emissions are sustained in the long term. In fact, many questioned what incentive a polluting company might have to invest and work towards reducing its emissions, if it is able and willing to pay the carbon price.

Many also recognized that air pollution is a global issue, and they questioned the effectiveness of Canada's actions on carbon pricing if other countries failed to act.

Asbestos

Asbestos was considered as posing a health risk, and as such there was support for banning its use in Canada.

To conclude the discussions, participants in Halifax and Sherbrooke were asked a few questions about asbestos. For the most part, participants believed that asbestos is already banned in Canada. Most were surprised to hear that asbestos is currently banned for export out of Canada, but that we still import it in



some areas. Most participants were concerned with the health risks associated with asbestos used in manufacturing products in Canada and, as such, are agreeable to having it banned.

In Sherbrooke, a few participants were unsure of whether it should be banned given its current use, such as making firefighters' uniforms fire retardant. That being said, they would like to know more about the health risks associated with asbestos.

Culture and Heritage

In Sherbrooke, Halifax, Surrey, Winnipeg, Montreal and Toronto, a few brief questions on Canadian content were included in the group discussions.

Culture Sector in Canada

Canadian culture was broadly defined by its people, places of culture, and forms of cultural expression.

Participants were asked what comes to mind when they think of the culture sector in Canada. A variety of responses were provided, with some commonalities across locations. Many participants, particularly in Halifax, Surrey, and Sherbrooke, cited ***places of culture***, such as museums, libraries, and theatres, or public gatherings, such as festivals. Mentions of specific ***forms of cultural expressions*** were also common, including music, 'the arts' in general, performing arts, films, and historical architecture. History, heritage, and genealogy were also cited, particularly in Winnipeg and Montreal.

Influences of cultural expressions were also top-of-mind when thinking about culture in Canada. Most notably, in many locations, Canadian culture was defined as 'diverse', a 'melting pot', and 'multicultural'. ***Bilingualism*** was mentioned in Montreal. References to ***Aboriginal influences*** were also made in most locations. At the same time, ***'people'*** was associated with culture, particularly in terms of who it includes and touches.

When asked what challenges, if any, the culture sector in Canada faces, two barriers were consistently noted in most groups. To begin, the lack of proper financial support to the cultural sector was deemed an important impediment to its success. Participants made reference to the reduction in government grants and subsidies as being most concerning. At the same time, in some locations, it was felt that the cost of consuming culture, particularly by attending live events and shows, was becoming increasingly prohibitive.

Another perceived challenge discussed in Montreal and Winnipeg was the threat posed by increasingly accessible American productions. In fact, many participants felt that with the Internet having become an important conduit for consuming culture, Canadian productions faced an increasingly large competition. This situation was also viewed as influencing Canadian productions' creative approach, to appeal to Canadian audiences' expectations. In Montreal, it was also believed that the Quebec culture is continually threatened by English-Canadian productions in addition to the American threat. At the same



time, Sherbrooke participants noted that this changing landscape posed a risk to the expression of French language. Finally, in some locations, a few participants perceived that culture was undervalued by the public, thus making it difficult for this sector to thrive. In a sense, the cultural sector was described as suffering from ‘a lack of pride’ from Canadians.

Other mentions included the ineffective balance between new, exploratory artists and more established, mainstream performers, the difficulty for Canadian culture to be exported, and the lack of cultural diversity in Canadian productions.

Awareness and Perceptions of Canadian Content

Awareness of Canadian content was widespread and its quality was viewed as having improved in the past few years.

Awareness of Canadian Content

Participants were generally familiar with the term ‘Canadian content’, although knowledge of what it entails was limited. Indeed, the expression was only associated with a Canadian-made artistic or cultural production. The name itself implied heritage, national, ‘made in Canada’, with many referring to the CBC productions as a good example of Canadian content.

In an individual exercise, participants were asked to circle which words they associated with Canadian content. Overall, by far the most commonly-selected word was **diverse**. Approximately half of participants selected the words **high quality**. Approximately one third selected **popular** and, in addition, its polar opposite – **unpopular**. While approximately one third associated the words **modern** and **exciting** to Canadian content, a similar number found it **boring**, **outdated** and **low quality**. Very few individuals selected any of the other words shown, including **uniform**, **elitist** or **populist**. During a follow-up discussion, other terms surfaced to speak of Canadian content, including being original, personal, authentic, and multicultural.

When asked to offer examples of Canadian content, participants’ choices varied by location, likely due to linguistic differences. In Halifax, examples included TV programs such as **Trailer Park Boys**, **Corner Gas**, **the Red Green Show**, **Heritage minutes**, **W5**, **APTN**, **Air Farce**, **CBC** and **Hockey Night in Canada**, as well as music such as **Bryan Adams**, **Drake**, **Anne Murray**, **Classified**, **Justin Bieber**, **Michael Bubble**, **Celine Dion**, **Nickleback** and **Rita McNeil**. Other Canadian content examples included television commercials, local culture examples (such as the Fisheries Museum in Lunenburg), books/publishing, sports, food and clothing.

In Sherbrooke, examples of Canadian content included TV programs such as **Hockey Night in Canada**, **local news**, **Juste pour rire**, **Unité 9**, **19-2**, as well as Quebec films, music and culture (such as Cirque du Soleil).



In Montreal, television productions such as **Rupture** and **19-2** were identified as good examples of Canadian content. Quebec films and producers, such as **Denis Arcand** and **Xavier Dolan**, were also recognized. In music, **Bryan Adams**, **Céline Dion**, **Gilles Vigneault**, and **Justin Bieber** were mentioned. Many also cited **Cirque du Soleil** as a good example of an expression of Canadian culture. The **Montreal Symphony Orchestra**, **Grands Ballets Canadiens**, and **Just for Laughs festival** were other specific mentions. **Radio-Canada** was also named as a recognized icon of Canadian content. Other less commonly cited examples included Canadian athletes at the Olympics, the Canadian hockey team, maple syrup, and beavers.

In Toronto, television channels such as the CBC and CTV were commonly mentioned as representative of Canadian content. **Hockey Night in Canada**, **Corner Gas**, **The National**, **Rookie Blue**, **Anne of Green Gables**, **Private Eyes**, **Flashpoint**, and the **Royal Canadian Air Farce** were specific examples of television shows provided. In terms of music, **Justin Bieber**, **Drake**, the **Tragically Hip**, **Neil Young**, **Gord Donnie**, and **Rush** were the most recalled Canadian icons. **CBC radio** and the **CRTC** were identified. Other mentions that were more generic included hockey, television, movies, food, books, films, clothes, steel, maple syrup, the game UNO, polk-a-dots, and authors. Finally, companies such as Research in Motion, Nortel, Bombardier, and Protex were also identified.

Quality of Canadian Content

The quality of Canadian Content, as evaluated in four locations, across television, movies, theatre and music, was viewed as mid or average. Using a zero to ten-point scale, where zero was weak and ten was strong, participants typically offered scores of between 4 and 7 across the four media, with **music** being deemed to be the strongest, followed by **television**, and with **theatre** and **film/movies** being rated as the weakest of the four.

Participants offered mixed opinions when asked if the quality of Canadian content has improved, stayed the same or worsened over the past few years. Better special effects, and the improved quality of television show productions were mentioned as evidence of improvements. Moreover, with increased access to cultural content from across the border over the past few years, it was believed that the quality of Canadian content was forced to improve to keep up with the quality of American productions. At the same time, it was felt that a reduction in funding has forced producers to be more creative and resourceful. In smaller communities, it was also noted that the CBC no longer offers local news, something that is viewed as a step back.

Participants outside of the Province of Quebec were asked if they pay attention to Canadian content. Although they indicated that this is not a criterion that dictates what content they consume, English-speaking participants were proud of high quality Canadian productions. They also placed enough attention on Canadian content to be able to name quite a few television and music contents that are Canadian, as mentioned earlier in the report.



Protection of Canadian Content

The need for government support of Canadian content was recognized and desired, especially given the impact of increased access to content.

There was generally a good understanding of the concept of Canadian content as encompassing Canadian-made cultural productions. That being said, participants were not able to provide further information as to what makes a production 'Canadian'. While very few were aware of legislation specific to Canadian content, most were under the impression that broadcasters are required to include a minimum amount of Canadian content in their programming.

In Quebec, participants believed that laws on Canadian content apply to Quebec productions and protect artists and performers. As a result, it creates employment opportunity in the cultural industry and ensures the sector remains strong.

When asked whether the free market should decide whether cultural content is successful or not, or whether the Canadian government needs to get involved to make sure Canadian content can be successful, there was widespread support for the government to continue supporting Canadian content, given the changing landscape of cultural content distribution and the easier access to American content.

Supporting Canadian content was viewed as providing a level playing field between Canadian and American productions. It was also considered as helping our economy by creating employment and strengthening the industry. It was deemed as ensuring a greater level of diversity and enabling Canadian artists to become more self-sufficient. Having strong Canadian content was viewed as raising the country's profile abroad, educating Canadians on its history and heritage, and inspiring Canadians to get involved in the industry. Featuring Canadian content in media was also viewed as promoting Canada and likely contributing to increasing tourism.

By contrast, the cost of supporting Canadian content was viewed as a challenge, in addition to a potential risk of too much government control on artistic expression. The law, although ensuring access to Canadian content, was viewed as limiting access to other content that may have more widespread appeal, given the limited airtime available. A few participants believed that the law on Canadian content could ultimately lead to a weaker Canadian identity, and even a loss of what makes Canadians unique.

Having Canadian productions or music nominated for important awards, such as the Emmy or the Academy Awards did not appear to influence English-speaking participants' support of Canadian content laws. Many simply did not see the correlation, or understand that these individuals could have benefited initially from Canadian content support. In fact, they believed that many of the more successful artists, although having been born in Canada, have moved abroad and somewhat Americanized their offering to expand their audience, thus being less 'truly Canadian'. As such, some believed that government support should be directed towards less known or less commercial performers who may not have the means of these 'big name' artists.



All Canadians were viewed as benefiting from Canadian content laws, for being able to access quality local productions. At the same time, participants recognized that artists, particularly those lesser known, are important beneficiaries. Producers, promoters, agents and distributors (e.g., art galleries) were also identified as benefiting from this law.

Impact of the Digital World

Participants were informed that with the introduction of the Internet, the manner in which culture is consumed has shifted over the past few years, with more and more content available on networks such as iTunes and Netflix. Most recognized that their own consumption of culture has changed over the recent past as well.

To assess general perceptions on Canadian content and how the situation is evolving, participants were asked to indicate the extent to which they agreed or disagreed with selected statements, with one additional statement being asked in Montreal and Toronto.

Nearly all participants agreed, approximately half of whom strongly agreed, that **the way we consume content is changing rapidly, so we need to modernize to adjust**, with many participants indicating that this was a statement found to be most compelling to ensure that Canadian content is well funded.

In addition, there was generally strong agreement that **it is easier to access American content from Canada than ever before, so it is more important than ever that we protect Canadian culture**. While fewer felt that this argument is as compelling, it was nonetheless viewed as important and strongly supported by many to ensure that Canadian content is well funded.

Two further statements related to Canadian content were presented, and while the majority of participants agreed with each, the strength of agreement was less strong, and a greater number neither agreed nor disagreed with each, including **shrinking funding for Canadian content is hurting Canadian artists, and so we need to make sure we support our artists so they will continue to have a chance to succeed** and **we need to change the regulation system because it isn't fair for only cable TV providers to be supporting Canadian content when many Canadians are consuming content in other ways**.

The following statement, only asked in Montreal and Toronto, received a moderate level of agreement, with equally as many feeling neutral: **supporting Canadian content will help our economy by employing thousands of Canadians who work directly and indirectly in the culture sector, at things like film/TV/music production, historic sites, and festivals**.

Regulating Online Content

Although participants would like to see online content regulated to ensure it includes Canadian content, they were unsure of how this would be achievable within reasonable costs. As such, the consensus was that there should not be any rules applying to online content. A few mentioned that illegal downloading or streaming of cultural content are more problematic for the Canadian cultural industry than paid services, and thus should be the focus of government.



Financing Canadian Content

There was support for making telecommunications and foreign companies contribute to funding Canadian content, as long as the incremental cost is not passed on to subscribers.

Participants were informed that Canadian broadcasters are required to give 5 percent of their revenues from television subscriptions to fund Canadian content. However, with fewer Canadians purchasing TV subscriptions, and more and more accessing content via the Internet and on their smartphones, this could mean less funding for Canadian content. To address this issue, four approaches were presented for discussion, namely:

1. Making Canadian telecom companies pay a portion of the money they get from smartphones and Internet to fund Canadian content, even if this means they would likely pass on the cost to subscribers.
2. Requiring foreign companies like Netflix and iTunes to devote a portion of their revenues to fund Canadian content, even if once again this may mean they would pass the cost on to their subscribers.
3. Giving consumers the option of making a voluntary \$2 contribution to support Canadian content on their monthly telecom or Netflix bill.
4. Making telecom companies add an app to every smartphone sold in Canada that provides access to a variety of Canadian music, TV and film, even if it means paying \$3 more for a phone, with all proceeds going to fund Canadian content producers.

Of the four options presented, support was greatest for **making telecom and foreign companies contribute to fund Canadian content**. That being said, there was a strong desire for the additional cost to be assumed by those companies rather than being passed on to subscribers, especially with respect to cellular service, an industry that is considered uncompetitive. It was also mentioned that if foreign companies were required to contribute to fund Canadian content, there is also a risk that services such as Netflix decide to stop their Canadian distribution.

Opinions of each of the two other options were mixed, with the level of support being only marginally higher than the extent of opposition. Participants felt that a *voluntary* contribution would be preferable, but that very few would actually choose it. Having an opt-out option did not appeal to most, as they may not notice the charge on their monthly bill. The option of a *one-time* \$3 charge for smartphones sold was also found to be preferable over a mandatory monthly charge, given that it would be small in comparison to the cost of the phone, and would be a one-time charge only.

Another idea presented to participants entailed offering an online digital portal that brought together Canadian content of all types. Interest in this option was moderately high across locations, with consumers willing to pay a monthly fee ranging from \$5 to \$15 for unlimited access to the portal's content. That said, there was an expectation that this portal would offer a breadth and depth of



content, including mainstream and high quality productions. A few participants noted that this was the current mandate of the CBC, thus wondering how this additional channel would be different.

Canadian Bank Notes

Although there was support for a prominent Canadian woman to be featured on a bank note, it was unclear which one would be most suitable.

Surrey, Winnipeg, Montreal, and Toronto participants were informed that the Bank of Canada currently intends to represent a prominent Canadian woman on one of Canada's bank notes. Prior to briefly discussing this topic, participants were informed of the names of individuals currently featured on each bank note, namely:

- Sir Wilfrid Laurier, Canada's first francophone Prime Minister, appears on the \$5 bill;
- John A. Macdonald, Canada's first Prime Minister, appears on the \$10 bill;
- Her Majesty Queen Elizabeth II appears on the \$20 bill;
- William Lyon Mackenzie, Canada's Prime Minister during WW2, appears on the \$50 bill; and
- Sir Robert Borden, Canada's Prime Minister during WWI, appears on the \$100 bill.

In each group, most participants had heard about the Bank of Canada's idea, and there was moderate support for this proposed initiative. Hesitations primarily stemmed from the fact that most participants were unaware of the reasons supporting this change. Further, it was unclear to them which of the five individuals currently featured on the bank notes should be replaced by a woman. It was also mentioned that the value of this kind of initiative depends on the woman that will be selected, and what she contributed to Canada. Suggestions were made to include Emily Carr, Nellie McClung, or a prominent Aboriginal woman, or even the first woman to have served as Canada's Prime Minister.

Participants were also informed that the Bank of Canada recently printed new \$100, \$50 and \$20 bills with security features and will not print new bills of those denominations for another decade. As such, participants were asked how they would feel about a woman replacing Prime Minister Laurier on the \$5 bill or Prime Minister Macdonald on the \$10 bill. Mixed opinions were offered. While some believed that French Canadians would oppose replacing a francophone Prime Minister such as Sir Wilfrid Laurier, others considered that Canada's first Prime Minister, John A. Macdonald, should remain featured on Canada's currency. Participants were unsure about the idea of replacing the image of John A. Macdonald, to reintroduce it on the \$100 bill.

In each location, a few participants raised the potential issue of placing the image of a woman on the lower-value bill, thus suggesting that women have less value. That being said, it was generally not deemed a significant issue.

In general, there was a sense that for this kind of initiative to be meaningful, the image of the woman should be featured on a bill that is heavily used. While some considered that the \$20 would place this



woman front and centre given the high number of \$20 bills in circulation, others were hesitant to completely remove the image of Queen Elizabeth II. Clearly; there was no consensus on that matter.

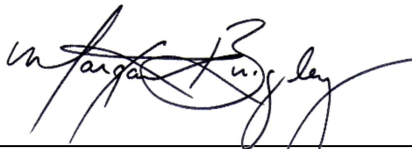
Finally, reactions were somewhat positive to keeping the Prime Ministers currently illustrated on the various bills, but adding the image of a prominent woman to the other side of one bill. Keeping all of the male historical figures was generally not viewed as a less meaningful gesture for gender equality. Rather, this approach was considered an opportunity to add multiple women, on multiple bills. That being said, a few people mentioned that having a woman featured on the 'back' of a bill suggests that women still play secondary role to men.

Additional suggestions included to introduce a new coin showing the woman's figure, to create a collage that would feature many women on a single bill, printing special edition bills to feature significant women, and placing both male and female figures side-by-side.

Political Neutrality Certification

I hereby certify as Senior Officer of Corporate Research Associates Inc. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Signed



Margaret Brigley, President & COO



Appendix A: Recruitment Screeners

Recruitment Screener

Government of Canada Spring 2016

Questionnaire # _____

Date of Last Group _____
of previous groups _____

<p>Prince George Tuesday, June 21, 2016 Group 1: Gen Pop @ 5:30 pm \$75 Group 2: Gen Pop @ 7:30 pm \$75</p> <p>Saskatoon Wednesday, June 22, 2016 Group 3: Gen Pop @ 5:30 pm \$75 Group 4: Gen Pop @ 7:30 pm \$75</p> <p>North York Wednesday, July 6, 2016 Group 3: Gen Pop @ 5:30 pm \$85 Group 4: Gen Pop @ 7:30 pm \$85</p> <p>Halifax Wednesday, July 27, 2016 Group 3: Gen Pop @ 5:30 pm \$75 Group 4: Gen Pop @ 7:30 pm \$75</p> <p>Surrey Wednesday, August 9, 2016 Group 3: Gen Pop @ 5:30 pm \$85 Group 4: Gen Pop @ 7:30 pm \$85</p> <p>Winnipeg Wednesday, August 10, 2016 Group 3: Gen Pop @ 5:30 pm \$75 Group 4: Gen Pop @ 7:30 pm \$75</p> <p>Toronto Wednesday, September 1, 2016 Group 3: Gen Pop @ 5:30 pm \$85 Group 4: Gen Pop @ 7:30 pm \$85</p>	<p>Recruit: 10 for 8 to show per group</p> <p>Honorarium: \$75 or \$85</p>
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Respondent's name: _____	Interviewer: _____
Respondent's phone #: _____ (home)	Date: _____
Respondent's phone #: _____ (work)	Validated: _____
Respondent's fax #: _____ sent? _____ or	Quality Central: _____
Respondent's e-mail : _____ sent? _____	On List: _____
Sample source (circle): panel random client referral	On Quotas: _____

Hello, my name is _____. I'm calling from Corporate Research Associates, a national public opinion research firm. On behalf of the Government of Canada we're organizing a series of discussion groups to explore various issues of importance to the country.

EXPLAIN FOCUS GROUPS. About ten people like you will be taking part, all of them randomly recruited just like you. For their time, participants will receive an honorarium of \$75.00. But before we invite you to attend, we need to ask you a few questions to ensure that we get a good mix and variety of people. May I ask you a few questions?

Yes **CONTINUE**
No **THANK AND TERMINATE**

Participation is voluntary. We are interested in hearing your opinions, no attempt will be made to sell you anything or change your point of view. The format is a "round table" discussion lead by a research professional. All opinions expressed will remain anonymous and views will be grouped together to ensure no particular individual can be identified.

S1) Do you or any member of your household work in or has retired from:

	YES	NO
Market Research or Marketing	1	2
Public Relations or Media (TV, Print)	1	2
Advertising and communications	1	2
An employee of a political party	1	2
An employee of a government department or agency, whether federal or provincial	1	2

IF "YES" TO ANY OF THE ABOVE, THANK AND TERMINATE

S2) Are you a Canadian citizen at least 20 years old who normally resides in the [XX] area?

Yes 1 **CONTINUE**
No 2 **THANK AND TERMINATE**

S3) How long have you lived in [CITY]? _____

TERMINATE IF LESS THAN 2 YEARS

S4) Are you the head or co-head of your household?

Yes	1	CONTINUE
No	2	THANK AND TERMINATE

S5) Have you ever attended a consumer group discussion, an interview or survey which was arranged in advance and for which you received a sum of money?

Yes	1	MAX. 1/3 PER GROUP
No	2	GO TO Q1

S6) How long ago was it? _____

TERMINATE IF IN THE PAST 6 MONTHS

S7) How many consumer discussion groups have you attended in the past 5 years?

TERMINATE IF MORE THAN 4 DISCUSSION GROUPS

ASK ALL

Q1) Could you please tell me what age category you fall in to? Are you...

Under 20	0	THANK AND TERMINATE
20-24 years	1	} ENSURE GOOD MIX PER GROUP
25-34 years	2	
35-44 years	3	
45-54 years	4	
55-64 years	5	
65+ years	6	
Refuse	9	THANK AND TERMINATE

Q2) Do you currently have children under the age of 18 living in the house with you?
[RECRUIT MIX]

Yes	1
No	2

Q3) How many people above the age of 18 are there in your household?

One	1
More than one	2

Q4) Could you please tell me what is the last level of education that you have completed?

Some high school	1	}	ENSURE
Completed high school	2		GOOD
Some College/University	3		MIX PER
Completed College/University	4		GROUP
RF/DK	9		

Q5) What is your current employment status?

Working full-time	1	}	MAX 3 PER GROUP
Working part-time	2		
Self-employed	3		
Retired	4		
Currently not working	5		
Student	6		
Other	7		
DK/RF	9		

Q6) [IF EMPLOYED/RETIRED] What is/was your current/past occupation?
_____ **(PLEASE SPECIFY)**

Q7) Which of the following categories best describes your total household income? That is, the total income of all persons in your household combined, before taxes **[READ LIST]**?

Under \$20,000	1	}	Ensure good mix by...
\$20,000 to just under \$ 40,000	2		
\$40,000 to just under \$ 60,000	3		
\$60,000 to just under \$ 80,000	4		
\$80,000 to just under \$100,000	5		
\$100,000 to just under \$150,000	6		
\$150,000 and above	7		
DK/RF	99		

Q8) **DO NOT ASK – NOTE GENDER**

Male	1	}	ENSURE 50-50 SPLIT
Female	2		

- Q9) If you won a million dollars what would be the first two things you would do with the money? (**MUST HAVE TWO RESPONSES TO ACCEPT. TERMINATE IF FLIPPANT, COMBATIVE OR EXHIBITS DIFFICULTY IN RESPONDING**)

TERMINATE IF RESPONDENT OFFERS ANY REASON SUCH AS SIGHT OR HEARING PROBLEM, A WRITTEN OR VERBAL LANGUAGE PROBLEM, A CONCERN WITH NOT BEING ABLE TO COMMUNICATE EFFECTIVELY OR IF YOU HAVE A CONCERN.

Invitation

As I mentioned earlier, the group discussion will take place the evening of, **DATE @ TIME for 2 hours** and participants will receive **\$75.00** for their time. Would you be willing to attend?

Yes	1	CONTINUE
No	2	THANK AND TERMINATE

PRIVACY QUESTIONS

INSERT PRIVACY QUESTIONS

Invitation:

Do you have a pen handy so that I can give you the address where the group will be held? It will be held at:

Winnipeg: NRG Research Group 1910 – 360 Main Street	North York: Head Research 5075 Yonge Street
Toronto: Consumer Vision 2 Bloor Street West, 3rd Floor	Halifax: Corporate Research Associates 5001 – 7071 Bayers Road, 5th Floor
Surrey: Comfort Inn & Suites 8255 166th Street, Surrey	Saskatoon: Insightrix 3223 Millar Ave
Prince George: Ramada Hotel 444 George St	

We ask that you arrive fifteen minutes early to be sure you find parking, locate the facility and have time to check-in with the hosts. The hosts may be checking respondents' identification prior to the group, so please be sure to bring some personal identification with you (for example, a driver's license). If you require glasses for reading make sure you bring them with you as well.

As we are only inviting a small number of people, your participation is very important to us. If for some reason you are unable to attend, please call us so that we may get someone to replace

you. You can reach us at **[NUMBER]** at our office. Please ask for **[NAME]**. Someone will also call you the day before to remind you about the discussion.

So that we can call you to remind you about the focus group or contact you should there be any changes, Can you please confirm your name and contact information for me? **[READ INFO AND CHANGE AS NECESSARY.]**

First name_____

Last Name_____

Email_____

Day time phone number_____

Night time phone number_____

If the respondent refuses to give his/her first or last name or phone number please assure them that this information will be kept strictly confidential in accordance with the privacy law and that it is used strictly to contact them to confirm their attendance and to inform them of any changes to the focus group. If they still refuse THANK & TERMINATE.

Appendix B: Moderator's Guides and Worksheets

Appendix B.1:

**Moderator's Guides:
Groups 1 and 2
(Prince George and Saskatoon)
Group 3 (North York)**

**Worksheet:
Groups 1-3**

Moderator's Guide – FINAL

Focus Groups – Summer 2016

Introduction

10 minutes

- **Welcome:** Introduction self & research firm
- **Sponsor:** Groups on behalf of the Government of Canada
- **Length:** Our discussion should last about 2 hours, excuse yourself if needed during the session
- **Moderator Role:** Guide/encourage discussions/participation; keep on-time & on-topic
- **Your Role:** Share your opinions freely and honestly; no prep needed; not testing your knowledge
- **Process:** All opinions are important; looking to understand minority/majority of opinions; talk one at a time; interested in hearing from everyone
- **Logistic:** Audio/video taping for reporting; observation representing the government (mirror/video feed)
- **Confidentiality:** Your comments are anonymous; no names in reports; answers will not affect dealings with Government of Canada; Once finalized, the report can be accessed through the Library of Parliament or Archives Canada.
- **Participant Introduction:** First name, who they live with (relationship to them), and favourite hobby/pastime

Warm-Up

10 minutes

To begin...

- What have you seen, read or heard about the Government of Canada lately?
- What one issue facing Canada today do you think that the Government of Canada should focus on?
FOCUS DISCUSSION ON FEDERAL ISSUES; MODERATOR RECORD ON FLIP CHART; PROBE ON ISSUES NOT COVERED LATER IN THE DISCUSSION
 - Why is that important?

Now thinking of local issues...

- What local concerns should the Government of Canada address?
- What does the Government of Canada do that has the largest impact your community? How about for you personally?
- The federal budget put a lot of money aside for infrastructure. What type of infrastructure projects would make the largest impact in your community? How about for you personally?

BACKGROUND INFORMATION FOR THE MODERATOR:

The Government of Canada announced it would invest over \$120 billion dollars in infrastructure projects over the next 10 years.

Innovation: Defining Concept

15 minutes

Today, I will be asking you to complete a number of individual exercises. These will make sure I get your personal opinion. I'm going to pass out a placemat or worksheet. Let's look at the first few exercises...

Exercise #1: Take a moment and indicate if you personally feel that innovation is a Canadian value. Then, jot down the first few words that come to mind when you hear the word “**innovation**”. Don’t overthink it – there are no right or wrong answers. I’ll give you a moment.

Exercise #2: Now, you’ll see a list of terms. Please check which ones you are familiar with – and, if so, jot down what it means to you.

Discuss as a group following the exercise:

- How would you define innovation? What does it mean?
- What are some examples of innovation? Any specific to Canada?
 - **PROBE AS NECESSARY:** These can be specific or general types of companies/innovation.
- Now looking at the terms listed on your exercise sheet... Which ones are you not familiar with?

There are a few terms that I’d like to hear your thoughts on...

- What does **entrepreneurship** mean to you?
 - Is entrepreneurship tied to innovation or to something else? If something else, what?
- Is this something the government should support?
- What does the term **productivity** mean to you?
 - What words come to mind when you hear the term “productivity” in the context of the Canadian economy?
- Should government try to improve productivity in Canada?

Now thinking about research clusters or hubs (**PROVIDE DEFINITION IF UNAWARE**):

- What are some examples of this in Canada?
- Do you think research clusters lead to more innovation?
- Should government focus on these clusters, or encourage innovation everywhere?

BACKGROUND INFORMATION FOR THE MODERATOR:

- **Entrepreneurship:** turning an idea into a profitable business (e.g. starting a new business)
- **High tech:** highly sophisticated, often electronic, methods, machines or equipment
- **Digital economy:** an economy that is based on digital computing technologies (“the Internet economy”)
- **R & D:** work directed toward the innovation, introduction, and improvement of products and processes
- **Research cluster:** a group of researchers who collaborate on research
- **Research hub:** a shared space that encourages collaboration between researchers
- **Productivity:** a measure of the efficiency of people, machines, factories, etc. in producing goods or completing work

Innovation: Exploring Perceptions**15 minutes**

Exercise #3 lists a number of statements about Canada and innovation. **Which three** do you think are most accurate (checkmark next to each three)? Then indicate which **one** you think would work best for encouraging foreign innovative companies to move to Canada. I will give you a few moments.

Discuss as a group after the exercise:

- Do you consider innovation a Canadian value? If so, why?
 - How have Canadians demonstrated innovation so far?
 - Which statements do you think are most accurate?
 - Which one statement would best encourage foreign innovative companies to move to Canada? Why that one?
 - What would you consider the benefits of innovation? And what are the risks? **MODERATOR TO LIST ON FLIP CHART**
- IF NOT MENTIONED:**
- Does innovation create jobs? Do you think innovation jobs are higher quality and better paying jobs than other jobs? Or does it lead to job losses? **PROBE on driverless car example, if no one mentions**
 - Does innovation grow the economy?
 - Could it lower the cost of living?
 - Could it save people time?
 - Could it help the environment?
 - What could government do to minimize any negative impacts?

Innovation: Government of Canada's Role**15 minutes**

Some people say it's better for the government to stay out of the way and let the free market work. Others say the government should support certain types of businesses.

Discuss, as a group:

- Have you heard of anything that the Government of Canada is actively doing on innovation?
- What role, if any, should the Government of Canada play when it comes to innovation?
 - Should it help to create the conditions for innovation to thrive in Canada?
 - Should it bring in more innovation and experimentation into government?

There are different ways the government could help innovative companies, including providing them 1) tax cuts or 2) subsidies or 3) investing in those companies.

Exercise #4: On your worksheet, place a checkmark next to the approaches listed you think should be used by government to support innovation, if any. Then indicate if you believe government should be helping individual innovators, small innovative companies, or large innovative companies, if at any.

Discuss as a group after the exercise:

- Which of those actions are most appropriate for governments to support innovation?
- And who should it support?

- In which sectors should the government encourage innovation? Why those?

Exercise #5: I am going to share with you a number of statements concerning innovation. Indicate to what extent you agree or disagree with each. I'll give you a few minutes.

Discuss as a group, following the exercise:

- What are your thoughts on these statements? **REVIEW EACH STATEMENT INDIVIDUALLY**

One way that government could encourage innovation is by creating what we'll call "moonshot challenges". A moonshot is an ambitious, exploratory and ground-breaking project undertaken without any expectation of near-term profitability or benefits. For example, it could mean government investing in innovative projects such as driverless cars, unmanned aircraft to delivery packages (Project Wing), or a network of balloons traveling on the edge of space, designed to help people connect to the Internet in remote areas or during a crisis situation when traditional Internet sources are unavailable (Project Loon).

- What do you think of government investing in "moonshot challenges"?

Innovation: Goals

10 minutes

Let's talk a bit about goals...

- What should the government's targets or goals be when it comes to innovation?

Exercise #6: I'm going to share a few broad goals that could direct the government's policy development. On your exercise sheet, take a minute to indicate which areas government should focus on (thumb up) and which should be avoided (thumb down). I'll give you a moment.

Discuss as a group, after the exercise:

- Which goals should government focus on? Why?
- Which ones, if any, should be avoided? Why?

Exercise #7: Now let's have a look at another list of actions the government could implement. As we read through the list together, I would like you to place a checkmark next to each statement that you believe the Government of Canada should focus on to encourage innovation. **MODERATOR READS THE LIST WITH PARTICIPANTS COMPLETING THE EXERCISE.** Then, take a moment to indicate to indicate which ones speak to you the most. Please select up to 3 statements. I will give you a moment.

Discuss as a group, following the exercise:

- Which goals are most appealing to you? Why?

MODERATOR COLLECTS WORKSHEET

Environment: Carbon Pricing**30 minutes**

For the remainder of our discussion, we will shift our discussion to talk about the environment.

- What are some of the environmental issues the government should be addressing?

Let's talk about some of the terms we sometimes hear when people talk about the environment.

- Have you heard the term "clean jobs" before today? If so, what does it mean?
- Have you heard the term "green jobs" before? If so, what does it mean?
- Are "clean jobs" and "green jobs" the same or are they different?
- Have you heard the term "carbon pricing"? If so, what does it mean?

MODERATOR TO CLARIFY IF NECESSARY: Carbon pricing is where you charge those who emit carbon dioxide (CO₂) for their emissions.

- Have you heard carbon pricing referred to by any other names?
- Would there be a better name to talk about this concept? If so, which one?
 - How about "pollution tax"? Or "Making polluters pay"? Are these better to simplify the concept of carbon pricing? Any others?
- Based on what you know, what if anything, do you like about carbon pricing?
- And what do you dislike about it, if anything?
- How does carbon pricing impact the Canadian economy? Does it help or hurt it in any way?
 - What impact might it have on employment?
 - And does it have an impact on your life?

I would like you to compare two concepts, the carbon tax and the cap and trade system.

- What is the difference between a carbon tax and a cap and trade system?

CLARIFY IF NEEDED: A carbon tax is a tax on greenhouse gasses generated from burning fuels such as gasoline. A cap and trade system is where the government sets a cap on the number of emission units. Companies cannot exceed the cap; firms that need to increase their volume emissions must buy units from those who use less or purchase offset credits.
- Thinking about the carbon tax...what works and doesn't work with this approach?
- And what works and doesn't work with the cap and trade system based on what you know?
- Do you know of any carbon pricing models being used in Canada right now? If so, where? What types of models are currently used?

I would like to show you what carbon pricing models has been used in various provinces in Canada.

MODERATOR DISTRIBUTES A MAP TO EACH PARTICIPANT

- How do you feel about each province having its own approach to carbon pricing?
- What should be the role of the federal government in this process?
 - Should it set up a national carbon pricing system for all provinces to follow?

- Should it set a minimum carbon price for provinces and let provinces decide how to go about it?

BACKGROUND INFORMATION FOR THE MODERATOR:

A minimum carbon price is a regulatory policy that states that polluters must pay a minimum amount of money for the right to pollute. So for example, the federal government could set the carbon floor price at the level that currently exists in Quebec; all provinces would then need to establish a levy at this minimum (or higher, if they so choose).

- Or should it just stay out of it altogether?
- What should the money raised by the federal government from carbon pricing be used for?
 - Reduce taxes or invest in green technologies and infrastructure?
- Should carbon prices be higher, lower, or the same as they currently are?

Environment: Communication

15 minutes

Exercise #8: There are a number of statements listed on your exercise sheet. For each, please indicate the extent to which you agree or disagree with the statement (thumbs up/down). I will give you a couple of minutes to do so.

Discuss as a group, following the exercise:

- Which of those statements are best to explain the concept of carbon pricing? Why?
- Do you agree with any of these statements? Why/why not?
- Are any inappropriate for speaking of carbon pricing? If so, which ones and why?
- Do any of these statements change how you feel about carbon pricing? If yes, how so? Does it make you more or less supportive of it?
- Are there any other analogies that would help describe carbon pricing?
- Do you think carbon pricing is something the federal government should move on?
- How important is it compared to other government priorities?

Exercise #9: We've spent a lot of time talking about carbon pricing. Now that you've thought a bit about it, I want you to complete one last exercise. This asks you three final questions about carbon pricing. I will give you about 5 minutes to complete this exercise.

After the exercise is completed:

In the interest of time, I will review your responses on my own later.

IF TIME PERMITS: We have covered a lot of topics today and really appreciate you taking the time and energy to come down here and give your opinion. Your input is very important and insightful! To conclude any last thoughts that you want to give the Government of Canada?

Thanks & Closure

That concludes our discussion. On behalf of the Government of Canada, thank you for your time and input.

Moderator's Guide – FINAL

Focus Groups – Summer 2016

Introduction

10 minutes

- **Welcome:** Introduction self & research firm
- **Sponsor:** Groups on behalf of the Government of Canada
- **Length:** Our discussion should last about 2 hours, excuse yourself if needed during the session
- **Moderator Role:** Guide/encourage discussions/participation; keep on-time & on-topic
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- **Confidentiality:** Your comments are anonymous; no names in reports; answers will not affect dealings with Government of Canada; Once finalized, the report can be accessed through the Library of Parliament or Archives Canada.
- **Participant Introduction:** First name, who they live with (relationship to them), and favourite hobby/pastime

Warm-Up

10 minutes

To begin...

- What have you seen, read or heard about the Government of Canada lately?

Hot Topic:

Prince George, Saskatoon - CPP:

- What have you heard about changes to the CPP? How would you explain what is happening?
- What words would you use to describe the changes (e.g., expand, strengthen)?
- What impact, if any, does it have on your life?
- What's good or bad about the CPP changes?
- What one issue facing Canada today do you think that the Government of Canada should focus on?
FOCUS DISCUSSION ON FEDERAL ISSUES; MODERATOR RECORD ON FLIP CHART; PROBE ON ISSUES NOT COVERED LATER IN THE DISCUSSION
 - Why is that important?

Now thinking of local issues...

- What local concerns should the Government of Canada address?
- What does the Government of Canada do that has the largest impact your community? How about for you personally?
- The federal budget put a lot of money aside for infrastructure. What type of infrastructure projects would make the largest impact in your community? How about for you personally?

BACKGROUND INFORMATION FOR THE MODERATOR:

The Government of Canada announced it would invest over \$120 billion dollars in infrastructure projects over the next 10 years.

Innovation: Defining Concept***15 minutes***

Today, I will be asking you to complete a number of individual exercises. These will make sure I get your personal opinion. I'm going to pass out a placemat or worksheet. Let's look at the first few exercises...

Exercise #1: Take a moment and indicate if you personally feel that innovation is a Canadian value. Then, jot down the first few words that come to mind when you hear the word “**innovation**”. Don't overthink it – there are no right or wrong answers. I'll give you a moment.

Exercise #2: Now, you'll see a list of terms. Please check which ones you are familiar with – and, if so, jot down what it means to you.

Discuss as a group following the exercise:

- How would you define innovation? What does it mean?
- What are some examples of innovation? Any specific to Canada? How have Canadians demonstrated innovation? **PROBE AS NECESSARY:** These can be specific or general types of companies/innovation.

There are a few terms that I'd like to hear your thoughts on...

- What does **entrepreneurship** mean to you?
 - Is entrepreneurship tied to innovation or to something else? If something else, what?
- Is this something the government should support?
- What does the term **productivity** mean to you?
 - What words come to mind when you hear the term “productivity” in the context of the Canadian economy?
- Should government try to improve productivity in Canada?

Now thinking about research clusters or hubs (**PROVIDE DEFINITION IF UNAWARE**):

- What are some examples of this in Canada?
- Do you think research clusters lead to more innovation?
- Should government focus on these clusters, or encourage innovation everywhere?

BACKGROUND INFORMATION FOR THE MODERATOR:

- **Entrepreneurship:** turning an idea into a profitable business (e.g. starting a new business)
- **High tech:** highly sophisticated, often electronic, methods, machines or equipment
- **Digital economy:** an economy that is based on digital computing technologies (“the Internet economy”)
- **R & D:** work directed toward the innovation, introduction, and improvement of products and processes
- **Research cluster:** a group of researchers who collaborate on research
- **Research hub:** a shared space that encourages collaboration between researchers
- **Productivity:** a measure of the efficiency of people, machines, factories, etc. in producing goods or completing work

Innovation: Exploring Perceptions**15 minutes**

Exercise #3 lists a number of statements about Canada and innovation. Which three do you think are most accurate (checkmark next to each three)? Then indicate which one you think would work best for encouraging foreign innovative companies to move to Canada. I will give you a few moments.

Discuss as a group after the exercise:

- Which statements do you think are most/least accurate?
- Which one statement would best encourage foreign innovative companies to move to Canada? Why that one?
- What would you consider the benefits of innovation? And what are the risks? **MODERATOR TO LIST ON FLIP CHART**

IF NOT MENTIONED:

- What is the impact of innovation on employment and job creation? The Canadian economy? The cost of living? People's time? The Environment? **PROBE ON POSITIVE AND NEGATIVE**
- Employment and job creation?
- What could government do to minimize any negative impacts?

Innovation: Government of Canada's Role**15 minutes**

Some people say it's better for the government to stay out of the way and let the free market work. Others say the government should support certain types of businesses.

Discuss, as a group:

- Have you heard of anything that the Government of Canada is actively doing on innovation?

Exercise #4: There are different ways the government could help innovative companies, including providing them 1) tax cuts or 2) subsidies or 3) investing in those companies. On your worksheet, place a checkmark next to the approaches listed you think should be used by government to support innovation, if any. Then indicate if you believe government should be helping individual innovators, small innovative companies, or large innovative companies, if at any.

Exercise #5: I am going to share with you a number of statements concerning innovation. Indicate to what extent you agree or disagree with each. I'll give you a few minutes.

Discuss as a group after the exercise:

- Which of those actions (exercise #4) are most appropriate for governments to support innovation?
- And who should it support?
- In which sectors should the government encourage innovation? Why those?

One way that government could encourage innovation is by creating what we'll call "moonshot challenges". A moonshot is an ambitious, exploratory and ground-breaking project undertaken without any expectation of near-term profitability or benefits. For example, it could mean government investing in innovative projects such as driverless cars, unmanned aircraft to delivery packages (Project Wing), or a network of

balloons traveling on the edge of space, designed to help people connect to the Internet in remote areas or during a crisis situation when traditional Internet sources are unavailable (Project Loon).

- What do you think of government investing in “moonshot challenges”?

Innovation: Goals

10 minutes

Exercise #6: I’m going to share a few broad goals that could direct the government’s policy development. On your exercise sheet, take a minute to indicate which areas government should focus on (thumb up) and which should be avoided (thumb down). I’ll give you a moment.

Exercise #7: Now let’s have a look at another list of actions the government could implement. As we read through the list together, I would like you to place a checkmark next to each statement that you believe the Government of Canada should focus on to encourage innovation. **MODERATOR READS THE LIST WITH PARTICIPANTS COMPLETING THE EXERCISE.** Then, take a moment to indicate which ones speak to you the most. Please select up to 3 statements. I will give you a moment.

Discuss as a group, after the exercise:

- What role, if any, should the Government of Canada play when it comes to innovation?
 - Should it help to create the conditions for innovation to thrive in Canada?
 - Should it bring in more innovation and experimentation into government?
- Which goals should government focus on? Why?
- Which ones, if any, should be avoided? Why?
- What are your thoughts on these statements (exercise #5)? **REVIEW EACH STATEMENT INDIVIDUALLY**

MODERATOR COLLECTS WORKSHEET

Environment: Carbon Pricing

30 minutes

For the remainder of our discussion, we will shift our discussion to talk about the environment.

- What are some of the environmental issues the government should be addressing?

Let’s talk about some of the terms we sometimes hear when people talk about the environment.

- Have you heard the term “clean jobs” before today? If so, what does it mean?
- Have you heard the term “green jobs” before? If so, what does it mean?
- Are “clean jobs” and “green jobs” the same or are they different?
- Have you heard the term “carbon pricing”? If so, what does it mean?
MODERATOR TO CLARIFY IF NECESSARY: Carbon pricing is where you charge those who emit carbon dioxide (CO2) for their emissions.
- Have you heard carbon pricing referred to by any other names?
- Would there be a better name to talk about this concept? If so, which one?

- How about “pollution tax”? Or “Making polluters pay”? Are these better to simplify the concept of carbon pricing? Any others?
- Based on what you know, what if anything, is good about carbon pricing?
- And what do you dislike about it, if anything?
- How does carbon pricing impact the Canadian economy? Does it help or hurt it in any way?
 - What impact might it have on employment?
 - And does it have an impact on your life?

I would like you to compare two concepts, the carbon tax and the cap and trade system.

- What is the difference between a carbon tax and a cap and trade system?
CLARIFY IF NEEDED: A carbon tax is a tax on greenhouse gasses generated from burning fuels such as gasoline. A cap and trade system involves a government setting a cap or limit on total greenhouse gas emissions in a province or country. Companies can trade emissions credits. So companies with low emissions can sell emissions credits to companies with high emissions. But there are only so many emission credits available, so the province or country's emissions don't exceed the cap
- Thinking about the carbon tax...what works and doesn't work with this approach?
- And what works and doesn't work with the cap and trade system based on what you know?
- Do you know of any carbon pricing models being used in Canada right now? If so, where? What types of models are currently used?

I would like to show you what carbon pricing models has been used in various provinces in Canada.

MODERATOR DISTRIBUTES A MAP TO EACH PARTICIPANT

- How do you feel about each province having its own approach to carbon pricing?
- What should be the role of the federal government in this process? Should it be involved in some way or stay out of it completely?
 - Should it set up a national carbon pricing system for all provinces to follow?
 - Should it set a minimum carbon price for provinces and let provinces decide how to go about it?

BACKGROUND INFORMATION FOR THE MODERATOR:

A minimum carbon price is a regulatory policy that states that polluters must pay a minimum amount of money for the right to pollute. So for example, the federal government could set the carbon floor price at the level that currently exists in Quebec; all provinces would then need to establish a levy at this minimum (or higher, if they so choose).

- What should the money raised by the federal government from carbon pricing be used for?
 - Reduce taxes or invest in green technologies and infrastructure?
- **IF RELEVANT:** Should carbon prices be higher, lower, or the same as they currently are?

Environment: Communication**15 minutes**

Exercise #8: There are a number of statements listed on your exercise sheet. For each, please indicate the extent to which you agree or disagree with the statement (thumbs up/down). I will give you a couple of minutes to do so.

Discuss as a group, following the exercise:

- Which of those statements are best to explain the concept of carbon pricing? Why?
- Do you agree with any of these statements? Why/why not?
- Are any inappropriate for speaking of carbon pricing? If so, which ones and why?
- Are there any other analogies that would help describe carbon pricing?
- Do any of these statements change how you feel about carbon pricing? If yes, how so? Does it make you more or less supportive of it?
- Do you think carbon pricing is something the federal government should move on?
- How important is it compared to other government priorities?

Exercise #9: We've spent a lot of time talking about carbon pricing. Now that you've thought a bit about it, I want you to complete one last exercise. This asks you three final questions about carbon pricing. I will give you about 5 minutes to complete this exercise.

After the exercise is completed:

In the interest of time, I will review your responses on my own later.

IF TIME PERMITS: We have covered a lot of topics today and really appreciate you taking the time and energy to come down here and give your opinion. Your input is very important and insightful! To conclude any last thoughts that you want to give the Government of Canada?

Thanks & Closure

That concludes our discussion. On behalf of the Government of Canada, thank you for your time and input.



Innovation



Exercise #1

Is “innovation” a Canadian value?		What words come to mind when you think of “innovation”?
Yes	No	







Exercise #2

<input checked="" type="checkbox"/> :	What this means to you...	
	Entrepreneurship	
	High tech	
	Digital economy	
	R & D	
	Research clusters	
	Research hubs	
	Productivity	




Exercise #3

 Which statements are accurate?	<input checked="" type="checkbox"/> :	
There is a culture of innovation in Canada		
Canadians are innovative people		
Canada is an innovation nation		
Canadians are creative people		
Canadians are inventive people		

Exercise #4

Government Actions on Innovation			
How should it help?	<input checked="" type="checkbox"/> :	Who should it help?	<input checked="" type="checkbox"/> :
 Tax cuts		 Individual innovators	
 Subsidies		 Small innovative companies	
 Investments		 Large innovative companies	

Exercise #5

Do you agree or disagree with each statement?			
(Check one box for each statement <input checked="" type="checkbox"/>)			
The agriculture sector uses a lot of new technology, and innovation there is important since it could lower the cost of food for Canadians.			
Canada’s financial institutions are already successful, so they should use innovation to become world leaders.			
The clean tech sector is well suited to innovation, and will be a growing industry in coming years.			
The arts and culture sector is becoming more and more digital.			
Innovation in the healthcare sector will be important given Canada’s aging population.			



Innovation

Exercise #6

Which of the following should direct policy, and which should be avoided? (Check one box for each statement <input checked="" type="checkbox"/>)		
Support Canadian innovators and scientists, so that Canadians can invent new technologies		
Make Canada a global leader in the industries of tomorrow		
Help small innovative companies grow into large world leaders		
Help existing businesses adapt to the digital world and make use of existing technology		




Exercise #7

Which of the following should be the focus? (Check one box for each statement <input checked="" type="checkbox"/>)			Check up to three <input checked="" type="checkbox"/> :
Encourage highly skilled and educated innovators to immigrate to Canada			
Increase skills training so that Canadians have the skills for innovative jobs			
Increase government funding for higher education and R & D			
Increase the number of researchers in the Canadian workforce			
Encourage innovative partnerships between business and research institutions			
Grow super clusters, to make Canada a hotbed for cutting edge innovation			
Encourage businesses to invest more in R & D			
Increase the number of Canadian start-ups who grow into billion dollar companies			
Increase Canada's clean technology market share			
Position Canada to be a worldwide leader on 5G, the next generation of high-speed internet			
Make broadband and wireless internet accessible to all rural and low income Canadians			
Increase business investment in information and communication technologies			
Improve Canada's ranking on the World Bank "Ease of Doing Business" scale			
Increase R & D investments by foreign companies in Canada			
Make Canada the most business-friendly regulatory environment in the world for innovative businesses			



Carbon Pricing

Exercise #8

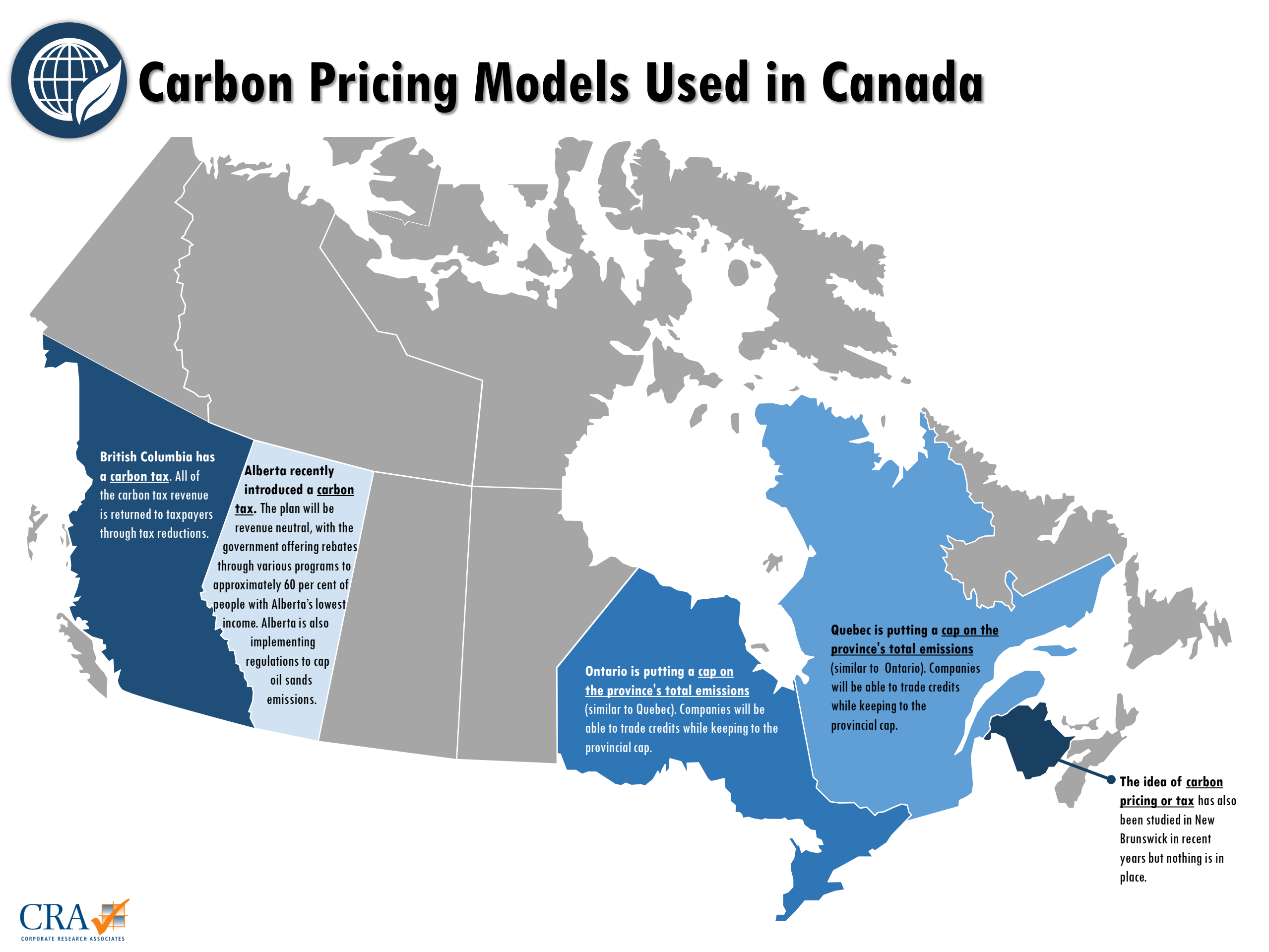
Do you agree or disagree with each statement? (Check one box for each statement <input checked="" type="checkbox"/>)			
Carbon pricing makes it more expensive to pollute and less expensive to operate cleanly.			
Carbon pricing is a market mechanism that will encourage everyone to make cleaner choices.			
A price on carbon will encourage companies to find innovative solutions to pollute less.			
Putting a price on carbon/pollution is like taxing cigarettes: we price things that are not good for us.			
Putting a price on carbon is like getting winter tires. It takes a bit of work to buy them and get put on your car. But once you've made the switch, you can drive faster AND safer. When we price carbon we're putting winter tires on our economy — but it's not faster and safer, it's cleaner and stronger.			
Carbon pricing is like charging a fee to put garbage in a dump. The fee pays for the operation of the dump. And the fee encourages people to reduce what they throw away and find new ways to avoid making more garbage.			

Exercise #9

How would you explain carbon pricing in a sentence to someone who has never heard the term before?

What is the strongest argument for you personally <u>in favour of</u> carbon pricing?

What is the strongest argument for you personally <u>against</u> carbon pricing?



Appendix B.2:
Group 6 (Halifax)

Moderator's Guide – FINAL

Focus Groups – Summer 2016

Introduction

10 minutes

- **Welcome:** Introduction self & research firm
- **Sponsor:** Groups on behalf of the Government of Canada
- **Length:** Our discussion should last about 2 hours, excuse yourself if needed during the session
- **Moderator Role:** Guide/encourage discussions/participation; keep on-time & on-topic
- **Your Role:** Share your opinions freely and honestly; no prep needed; not testing your knowledge
- **Process:** All opinions are important; looking to understand minority/majority of opinions; talk one at a time; interested in hearing from everyone
- **Logistic:** Audio/video taping for reporting; observation representing the government (mirror/video feed)
- **Confidentiality:** Your comments are anonymous; no names in reports; answers will not affect dealings with Government of Canada; Once finalized, the report can be accessed through the Library of Parliament or Archives Canada.
- **Participant Introduction:** First name, who they live with (relationship to them), and favourite hobby/pastime

Warm-Up

10 minutes

To begin...

- What have you seen, read or heard about the Government of Canada lately?
Hot Topic - CPP:
 - What have you heard about changes to the CPP? How would you explain what is happening?
 - What's good or bad about the CPP changes?
- What one issue facing Canada today do you think that the Government of Canada should focus on?
FOCUS DISCUSSION ON FEDERAL ISSUES; MODERATOR RECORD ON FLIP CHART; PROBE ON ISSUES NOT COVERED LATER IN THE DISCUSSION
 - Why is that important?

Now thinking of local issues...

- What local concerns should the Government of Canada address?
- What does the Government of Canada do that has the largest impact your community? How about for you personally?
- The federal budget put a lot of money aside for infrastructure. What type of infrastructure projects would make the largest impact in your community? How about for you personally?
- One way to pay for infrastructure projects is to privatize major public assets such as airports, ports and highways by leasing or selling stakes in these assets. What do you think of this kind of approach?

BACKGROUND INFORMATION FOR THE MODERATOR:

The Government of Canada announced it would invest over \$120 billion dollars in infrastructure projects over the next 10 years.

Heritage: Impressions of Canadian Content**20 minutes**

For the next part of our discussion, we will talk about heritage in a bit more depth.

- When we talk about the “culture sector” in Canada, what type of things come to mind?
 - Are you aware of any challenges facing this sector?
- Have you heard of the term “Canadian Content”?
- For those who have not heard about it, what does it mean just based on the name? ***Ask those familiar to hold their thoughts while the others answer first.***
 - And for the others, what does “Canadian Content” refer to?

BACKGROUND INFORMATION FOR THE MODERATOR:

Canada's Broadcasting Act declares that the Canadian broadcasting system should encourage the development of Canadian expression by:

- Providing a wide range of programming that reflects Canadian attitudes, opinions, ideas, values, and artistic creativity
- Displaying Canadian talent in entertainment programming
- Offering information and analysis concerning Canada and other countries from a Canadian point of view

Today, I will be asking you to complete a number of individual exercises. These will make sure I get your personal opinion. I'm going to pass out a worksheet. Let's look at the first few exercises...

Exercise #1: Circle the words you associate with Canadian content. You can circle as few or as many as you think are relevant. **FOR QUEBEC GROUPS:** When I speak of Canadian content, it also means Quebec content.

Exercise #2: Then, jot down a few examples of Canadian content that come to mind. It can be anything.

Exercise #3: There are different types of Canadian content listed. For each, mark on the scale how weak or strong you believe this type of content is, from a quality standpoint.

Exercise #4: Finally, indicate if you believe that overall, Canadian content has improved, worsened, or stayed the same over the past few years.

Discuss as a group, following the exercise:

- What examples of Canadian content did you provide?
- What words best describes Canadian content?
- How, if at all, as it changed in the past few years?
- **ASK OUTSIDE OF QUEBEC ONLY:** Do you pay attention to whether the content you consume is Canadian or not?
 - Do you feel different when you see or hear content which you know is Canadian, compared to American? If so, how do you feel?

Heritage: Protection**15 minutes**

- Have you heard of any laws in Canada that applies to Canadian content?
 - If so, what are they? What are they for?

BACKGROUND INFORMATION FOR THE MODERATOR:

Canada's Broadcasting Act sets out objectives to ensure that Canadian broadcasting content meets the needs and interests of Canadians. The Canadian Radio-television and Telecommunications Commission (CRTC) then sets policies and rules to ensure that those objectives are put into practice in Canada's broadcasting system. The CRTC currently requires broadcasters air a certain percentage of content that is defined as Canadian.

Generally for music to qualify as Canadian content at least 2 of the following conditions must be met:

- the music is composed entirely by a Canadian
- the music is, or the lyrics are, performed principally by a Canadian
- the music is recorded wholly in Canada, or performed wholly in Canada and broadcast live in Canada
- the lyrics are written entirely by a Canadian

For programming, a Canadian program is defined by its Canadian creative contributors (i.e. the producer, director, lead performers, etc.) .

- **ASK IN QUEBEC ONLY:** Are Canadian content laws relevant in Quebec?
 - What impact, if any do they have on Quebec artists? Do they help them? How so?

Some say that the free market should decide whether cultural content is successful or not, while others think the Canadian government needs to get involved to make sure Canadian content can be successful.

- Do you think the government should be intervening to protect and promote Canadian content?
 - What are the strongest reasons to support or not to support Canadian content and Canadian content creators? **MODERATOR TO LIST ON FLIP CHART**
 - **PROBE:** Are there any economic benefits? What specifically?
- What, if anything, do you think would change if the government stopped supporting content creators?
- Who do you think benefits most from Canadian content laws?
 - **IF CANADIAN ARTISTS ONLY:** Would that be all artists equally or some more so than others? **PROBE FOR:** big names, those struggling to get started, actors, musicians, those who help produce content, etc.

ASK OUTSIDE OF QUEBEC ONLY:

There have been examples of Canadian content finding success in recent years. The Canadian TV show "Orphan Black" was nominated for an Emmy award this year, Canadian movies "Room" and "Brooklyn" were each nominated for the Academy Award for Best Picture last year, and Canadian artists Joni Mitchell, Justin Bieber and The Weeknd each won Grammy Awards last year for their music.

- Does this type of success make you more or less likely to support Canadian content laws?

Heritage: Digital World**20 minutes**

Let's talk a bit about how things have changed over the last decade with a lot of content being available on the Internet.

- As more and more content moves online to places like iTunes and Netflix, do you think the government should treat online content differently than it treats TV and radio?
 - **IF TREATED DIFFERENTLY:** Do you say differently because you feel there should be no regulations for online, or because they need different types of regulations?

Canadian broadcasters are currently required to give 5% of their revenues from TV subscriptions to fund Canadian content. However, with fewer Canadians purchasing TV subscriptions, and more and more accessing content via the Internet and on their Smartphones, this could mean less funding for Canadian Content.

- Do you think Canadian Telecom companies should be required to pay a portion of the money they get from smartphones and internet to fund Canadian content, even if this means they would likely pass on the cost to subscribers?

Foreign companies like Netflix and iTunes do not need to devote any of their revenues to fund Canadian content.

- Do you think they should be required to, even if this once again means they would pass the cost on to subscribers?
- What do you think about giving people the option of making a voluntary \$2 contribution to support Canadian Content on their monthly Telecom or Netflix bill?
 - Would you choose this option?
 - Does your opinion change if it's an opt-out? (you must pay this unless you check and say you don't want to)
- If there was an online digital portal that brought together Canadian Content of all types, is this something you would be interested in visiting?
 - What if you had to pay for it?
- Would you support making telecom companies add an app to every smartphone sold in Canada that provides access to a variety of Canadian music, TV and films, even if it meant paying \$3 more for your phone, with all proceeds going to fund Canadian Content producers?

Now let's complete another few exercises...

Exercise #5: For each statement listed, indicate to what extent you believe this is a weak or strong argument in favour of the type of fees we talked about (using the thumb scale). Then, circle the statement that provides the strongest argument.

Exercise #6: Indicate whether you agree (thumb up) or disagree (thumb down) with each of the funding methods we discussed.

Discuss as a group, following the exercise:

- Which argument is the strongest? Why?
- Which ones are the weakest? What doesn't work with those?
- Which funding method do you most support?

Environment: Carbon Pricing**30 minutes**

For the remainder of our discussion, we will shift our discussion to talk about the environment.

- What are some of the environmental issues the government should be addressing?

Exercise #7: Let's talk about some of the terms we sometimes hear when people talk about the environment. Check the box next to each term you have heard of, and then indicate what they mean.

- Have you heard the terms "clean tech" and "green tech" before?
- If so, are they the same or are they different? What do they mean?
- Have you heard the term "carbon pricing"? If so, what does it mean?

MODERATOR TO CLARIFY IF NECESSARY: Carbon pricing is where you charge those who emit carbon dioxide (CO₂) for their emissions.

- Have you heard carbon pricing referred to by any other names?
- Would there be a better name to talk about this concept? If so, which one?
- Have you heard the term "pollution tax"? What does it mean?
- How about "emission tax", is this something you are familiar with? What does it mean?
- And what about the term, "carbon tax"?
- Which of those three terms best describe carbon pricing?
- What percentage of total emissions do you think come from businesses and what come from people (e.g. home heating, driving, etc)?
- Based on what you know, what if anything, is good about carbon pricing?
- And what do you dislike about it, if anything?
- How does carbon pricing impact the Canadian economy? Does it help or hurt it in any way?
 - What impact might it have on employment?
 - And does it have an impact on your life?

I would like you to compare two concepts, the carbon tax and the cap and trade system.

- What is the difference between a carbon tax and a cap and trade system?

CLARIFY IF NEEDED: A carbon tax is a tax on greenhouse gasses generated from burning fuels such as gasoline. A cap and trade system involves a government setting a cap or limit on total greenhouse gas emissions in a province or country. Companies can trade emissions credits. So companies with low emissions can sell emissions credits to companies with high emissions. But there are only so many emission credits available, so the province or country's emissions don't exceed the cap
- Thinking about the carbon tax...what works and doesn't work with this approach?
- And what works and doesn't work with the cap and trade system based on what you know?

- Do you know of any carbon pricing models being used in Canada right now? If so, where? What types of models are currently used?

I would like to show you what carbon pricing models has been used in various provinces in Canada. **REFER TO MAP**

- How do you feel about each province having its own approach to carbon pricing?
- What should be the role of the federal government in this process? Should it be involved in some way or stay out of it completely?
 - Should it set up a national carbon pricing system for all provinces to follow?
 - Should it set a minimum carbon price for provinces and let provinces decide how to go about it?
- What should the government do in cases where provinces don't want to set up a carbon prices system?
 - Should it do nothing (i.e. let them not have a system)?
 - Should the federal government set up its own system in that province?
 - Should it take away incentives, such as clean tech or transit incentives (a stick and carrot approach)?

BACKGROUND INFORMATION FOR THE MODERATOR:

A minimum carbon price is a regulatory policy that states that polluters must pay a minimum amount of money for the right to pollute. So for example, the federal government could set the carbon floor price at the level that currently exists in Quebec; all provinces would then need to establish a levy at this minimum (or higher, if they so choose).

Environment: Communication

10 minutes

Exercise #8: I'd like to get your thoughts on a number of statements about carbon pricing. Take a moment to indicate whether you agree or disagree with each statement on your exercise sheet. I will give you a moment to do so.

Discuss, as a group, following the exercise:

- Are these statements clear and easy to understand?
- Are these statements credible? If no, why not?
- Are they meaningful?

Asbestos

5 minutes

For the last few minutes, I'd just like to briefly discuss asbestos.

- Do you think asbestos is banned in Canada or not?
CLARIFY IF NEEDED: Asbestos is currently banned for export out of Canada but we still import it in some areas
- Do you think asbestos should be banned or not?

- **IF YES:** In terms of health priorities, how important is an asbestos ban compared to other health priorities?

Thanks & Closure

That concludes our discussion. On behalf of the Government of Canada, thank you for your time and input

Environment



Exercise #1

Circle the words you associate with Canadian Content:

Exciting Outdated Diverse Uniform

Boring Modern Elitist Low Quality

Popular Unpopular Populist High Quality

Exercise #2

Examples of Canadian Content:

.....

.....

.....

.....

Exercise #3

Rate the quality of the following Canadian Content:

	Weak	Strong
Television	● ●
Movies	● ●
Theatre	● ●
Music	● ●



Exercise #4

Overall, has the quality of Canadian Content improved, worsened, or stayed the same over the past few years?

- ☐ Improved
- ☐ Worsened
- ☐ Stayed the same

Exercise #5

	Agree			Disagree	
The way we consume content is changing rapidly, so we need to modernize to adjust.					
We need to change the regulation system because it isn't fair for only cable TV providers to be supporting Canadian Content when many Canadians are consuming content in other ways.					
Shrinking funding for Canadian Content is hurting Canadian artists, and so we need to make sure we support our artists so they will continue to have a chance to succeed.					
It is easier to access American content from Canada than ever before, so it is more important than ever that we protect Canadian culture.					



Exercise #6

Circle One:	
Make Telecoms contribute based on internet/phone revenue.	<input type="radio"/> <input type="radio"/>
Make foreign companies like Netflix contribute.	<input type="radio"/> <input type="radio"/>
Give Canadians the option to make a voluntary \$2 donation on their telephone bill.	<input type="radio"/> <input type="radio"/>
Add a \$3 application that provides Canadian content to every smartphone sold in Canada.	<input type="radio"/> <input type="radio"/>

Exercise #7

<input checked="" type="checkbox"/> : What this means to you...
<input type="checkbox"/> Clean Tech
<input type="checkbox"/> Green Tech
<input type="checkbox"/> Carbon Pricing
<input type="checkbox"/> Pollution Tax
<input type="checkbox"/> Emission Tax
<input type="checkbox"/> Carbon Tax



Exercise #8

	Circle One:	
A price on carbon will encourage companies to find innovative solutions to pollute less.		
A price on carbon is key to the clean energy economy of tomorrow.		
A national price on carbon will reduce pollution and make the Canadian economy more competitive.		
By putting a price on carbon, Canada is doing its part in the global fight against climate change.		
A price on carbon will lead to a healthier environment.		
A price on carbon will lead to healthier Canadians.		
Climate change is one of the greatest challenges of our time, and also one of the greatest opportunities.		
It's time to take strong action on climate change now for our children and future generations.		

Appendix B.3:

Groups 7 and 8
(Surrey and Winnipeg)

Moderator's Guide – FINAL

Focus Groups – Summer 2016

Introduction

10 minutes

- **Welcome:** Introduction self & research firm
- **Sponsor:** Groups on behalf of the Government of Canada
- **Length:** Our discussion should last about 2 hours, excuse yourself if needed during the session
- **Moderator Role:** Guide/encourage discussions/participation; keep on-time & on-topic
- **Your Role:** Share your opinions freely and honestly; no prep needed; not testing your knowledge
- **Process:** All opinions are important; looking to understand minority/majority of opinions; talk one at a time; interested in hearing from everyone
- **Logistic:** Audio/video taping for reporting; observation representing the government (mirror/video feed)
- **Confidentiality:** Your comments are anonymous; no names in reports; answers will not affect dealings with Government of Canada; Once finalized, the report can be accessed through the Library of Parliament or Archives Canada.
- **Participant Introduction:** First name, who they live with (relationship to them), and favourite hobby/pastime

Warm-Up

10 minutes

To begin...

- What have you seen, read or heard about the Government of Canada lately?
Hot Topic - CPP:
 - What have you heard about changes to the CPP? How would you explain what is happening?
 - What's good or bad about the CPP changes?
- What one issue facing Canada today do you think that the Government of Canada should focus on?
FOCUS DISCUSSION ON FEDERAL ISSUES; MODERATOR RECORD ON FLIP CHART; PROBE ON ISSUES NOT COVERED LATER IN THE DISCUSSION
 - Why is that important?

Now thinking of local issues...

- What local concerns should the Government of Canada address?
- What does the Government of Canada do that has the largest impact your community? How about for you personally?
- The federal budget put a lot of money aside for infrastructure. What type of infrastructure projects would make the largest impact in your community? How about for you personally?

BACKGROUND INFORMATION FOR THE MODERATOR:

The Government of Canada announced it would invest over \$120 billion dollars in infrastructure projects over the next 10 years.

Innovation**45 minutes**

Today, I will be asking you to complete a number of individual exercises. These will make sure I get your personal opinion. I'm going to pass out a placemat or worksheet. Let's look at the first few exercises...

Exercise #1 (2 from previous worksheet): Now, you'll see a list of terms. Please check which ones you are familiar with – and, if so, jot down what it means to you.

UPDATED LIST OF TERMS: INNOVATION, R&D, SOCIAL INNOVATION, CLEAN GROWTH, INCLUSIVE GROWTH, KNOWLEDGE ECONOMY

Discuss as a group following the exercise:

- Are there any terms you aren't familiar with? Which ones?
 - For those who have not heard about (TERM), what does it mean just based on the name?
Ask those familiar to hold their thoughts while the others answer first.
 - And for the others, what does (TERM) mean?

CLARIFY DEFINITION OF INNOVATION AND KNOWLEDGE ECONOMY AS NEEDED

- What types of jobs do you think would be created if the Government of Canada were to focus on innovation?
- What types of jobs do you think would be created if the Government of Canada were to focus on the knowledge economy?
- What do you think should be the greater priority for the Government of Canada:
 - encouraging growth of the knowledge economy or
 - encouraging growth in more established sectors, such as manufacturing and natural resources?

CLARIFY DEFINITION OF SOCIAL INNOVATION AS NEEDED

- Examples of social innovation include things like new technology to help charities raise money, or new tools to help homeless service providers prevent and reduce homelessness.
 - In terms of priorities, how does social innovation rank in terms of other innovation priorities?
 - Should it be a higher or lower priority for the Government of Canada than innovation geared towards improving quality of life or creating jobs?

BACKGROUND INFORMATION FOR THE MODERATOR:

- **Innovation:** the application of better solutions that meet new requirements, unarticulated needs, or existing market needs (e.g. technological innovations designed to save energy)
- **R & D:** work directed toward the innovation, introduction, and improvement of products and processes

- **Social innovation:** a novel solution to a social problem that is more effective, efficient, sustainable, or just than current solutions. The value created accrues primarily to society rather than to private individuals
- **Clean growth:** achieving economic growth, using clean technology, and allowing sustainable development (i.e. growing the economy while reducing emissions)
- **Inclusive growth:** economic growth that creates opportunity for all segments of the population and distributes the dividends of increased prosperity, both in monetary and non-monetary terms, fairly across society
- **Knowledge economy:** a system of consumption and production that is based on intellectual capital – i.e. the value of an organization's employee knowledge, business training and any proprietary information that may provide the company with a competitive advantage (e.g. research, technical support, consulting)

Exercise #2 (7 from previous workbook): Now let's have a look at another list of actions the government could implement. As we read through the list together, I would like you to place a checkmark next to each statement that you believe the Government of Canada should focus on to encourage innovation.

MODERATOR READS THE LIST WITH PARTICIPANTS COMPLETING THE EXERCISE. Then, take a moment to indicate which ones speak to you the most. Please select up to 3 statements. I will give you a moment.

UPDATES TO LIST:

- change wording on "increase the number of Canadian start-ups who grow into billion dollar companies" to "increase the number of small Canadian businesses who grow into world leaders"
- split "increase government funding for higher education and R & D" into two separate statements (one for education, one for R & D).
- add: "reversing the 'brain drain' by encouraging innovative Canadians and businesses to stay in Canada"

- What are your thoughts on the first statement "encourage highly skilled and educated innovators to immigrate to Canada"?
 - What do you see as the main reasons for doing this?
 - What do you see as the main reasons for not doing this?
 - What does "innovator immigrant" mean to you?
 - How should the Government of Canada find innovator immigrants?
- Each year, Canada allows a certain number of new immigrants into the country. If the Government of Canada wants to increase the number of innovator immigrants, it can either
 - a) increase the total number of new immigrants it allows each year, or
 - b) keep the overall number the same, but decrease the number of other types of immigrants (e.g. family members of people already in Canada or refugees).

Which approach do you prefer?

 - Does your opinion on bringing in more innovators change depending on which approach is used?
- Thinking of the new jobs that would be created if the Government of Canada were to focus on innovation, do you think new innovator immigrants would be selected over those already living in Canada for these jobs?

- Do you think bringing in innovator immigrants would lead to new jobs for those already living in Canada?

BACKGROUND INFORMATION FOR THE MODERATOR:

- In the last few years approximately 260,000 new immigrants came to Canada each year
- There are different categories of immigrants entering Canada:
 - The family members of people already in Canada
 - Economic immigrants including skilled workers
 - Refugees

- What are your thoughts on the statement “reversing the brain drain”?
 - Do you think Canada is experiencing a brain drain?
 - IF YES: is this a problem for Canada?
- What are your thoughts on the statement “increase the number of small Canadian businesses who grow into world leaders”?
 - What do you see as the main reasons for doing this?
 - What do you see as the main reasons for not doing this?

Exercise #3 (new exercise): If the Government of Canada is setting a goal when it comes to growing Canadian companies, which would be the most compelling way to describe it? Circle a thumbs up for a compelling description and a thumbs down for one that isn’t compelling. Then on the LEFT side, put a #1 next to the most compelling statement, and a #2 next to the second most compelling statement.

- If the Government of Canada is setting a goal when it comes to growing Canadian companies, which of the following is the most compelling way to describe it:
 - The Government of Canada is supporting innovative businesses so that they:
 - grow into world leaders
 - growing into billion dollar companies
 - grow to become big employers
 - grow to employ 1,000+ employees
 - become the next Google or Tesla
- What are your thoughts on the statement “increase R & D investments by foreign companies in Canada”? What do you think this means? How would you explain “foreign investment”
 - What do you see as the main reasons for doing this?
 - What do you see as the main reasons for not doing this?
- There are different types of foreign investment:
 - Foreign companies open factories or facilities in Canada
 - Foreign companies buying Canadian companies or parts of Canadian companies
- What do you think of these types of foreign investment?
 - What are the benefits to Canada for each of these types of investments?
 - What are the drawbacks?

- Can you think of examples where foreign investments can be good or bad for Canada?
 - PROMPT AS NECESSARY: Do you think foreign investment:
 - Provides businesses with money they need to grow and hire more employees
 - Brings in new technology and innovative ways of doing things
 - Opens up trade opportunities and markets for Canadian companies in other countries
 - Provides more tax revenue for the Government of Canada
- Have you heard of the Government of Canada's "Net Benefit Test"?
- Explain as necessary: a foreign investment will be approved by the Government of Canada only if it is likely to be a net benefit to Canada economically and is not injurious to national security
- What do you think of this test? Does this reassure you over any concerns you may have about foreign investment?
 - Is there anything else the Government of Canada should do?

Heritage: Impressions of Canadian Content

15 minutes

For the next part of our discussion, we will talk about heritage in a bit more depth.

- When we talk about the "culture sector" in Canada, what type of things come to mind?
 - Are you aware of any challenges facing this sector?
- Have you heard of the term "Canadian Content"?
- For those who have not heard about it, what does it mean just based on the name? ***Ask those familiar to hold their thoughts while the others answer first.***
 - And for the others, what does "Canadian Content" refer to?

BACKGROUND INFORMATION FOR THE MODERATOR:

Canada's Broadcasting Act declares that the Canadian broadcasting system should encourage the development of Canadian expression by:

- Providing a wide range of programming that reflects Canadian attitudes, opinions, ideas, values, and artistic creativity
- Displaying Canadian talent in entertainment programming
- Offering information and analysis concerning Canada and other countries from a Canadian point of view

Today, I will be asking you to complete a number of individual exercises. These will make sure I get your personal opinion. I'm going to pass out a worksheet. Let's look at the first few exercises...

Exercise #4: Circle the words you associate with Canadian content. You can circle as few or as many as you think are relevant. **FOR QUEBEC GROUPS:** When I speak of Canadian content, it also means Quebec content.

Exercise #5: Then, jot down a few examples of Canadian content that come to mind. It can be anything.

Exercise #6: There are different types of Canadian content listed. For each, mark on the scale how weak or strong you believe this type of content is, from a quality standpoint.

Exercise #7: Finally, indicate if you believe that overall, Canadian content has improved, worsened, or stayed the same over the past few years.

Discuss as a group, following the exercise:

- What examples of Canadian content did you provide?
- What words best describes Canadian content?
- How, if at all, as it changed in the past few years?
- **ASK OUTSIDE OF QUEBEC ONLY:** Do you pay attention to whether the content you consume is Canadian or not?
 - Do you feel different when you see or hear content which you know is Canadian, compared to American? If so, how do you feel?

Heritage: Protection

10 minutes

- Have you heard of any laws in Canada that applies to Canadian content?
 - If so, what are they? What are they for?

BACKGROUND INFORMATION FOR THE MODERATOR:

Canada's Broadcasting Act sets out objectives to ensure that Canadian broadcasting content meets the needs and interests of Canadians. The Canadian Radio-television and Telecommunications Commission (CRTC) then sets policies and rules to ensure that those objectives are put into practice in Canada's broadcasting system. The CRTC currently requires broadcasters air a certain percentage of content that is defined as Canadian.

Generally for music to qualify as Canadian content at least 2 of the following conditions must be met:

- the music is composed entirely by a Canadian
- the music is, or the lyrics are, performed principally by a Canadian
- the music is recorded wholly in Canada, or performed wholly in Canada and broadcast live in Canada
- the lyrics are written entirely by a Canadian

For programming, a Canadian program is defined by its Canadian creative contributors (i.e. the producer, director, lead performers, etc.) .

- **ASK IN QUEBEC ONLY:** Are Canadian content laws relevant in Quebec?
 - What impact, if any do they have on Quebec artists? Do they help them? How so?

Some say that the free market should decide whether cultural content is successful or not, while others think the Canadian government needs to get involved to make sure Canadian content can be successful.

- Do you think the government should be intervening to protect and promote Canadian content?
 - What are the strongest reasons to support or not to support Canadian content and Canadian content creators? **MODERATOR TO LIST ON FLIP CHART**
 - **PROBE:** Are there any economic benefits? What specifically?
- What, if anything, do you think would change if the government stopped supporting content creators?
- Who do you think benefits most from Canadian content laws?

- **IF CANADIAN ARTISTS ONLY:** Would that be all artists equally or some more so than others? **PROBE FOR:** big names, those struggling to get started, actors, musicians, those who help produce content, etc.

ASK OUTSIDE OF QUEBEC ONLY:

There have been examples of Canadian content finding success in recent years. The Canadian TV show “Orphan Black” was nominated for an Emmy award this year, Canadian movies “Room” and “Brooklyn” were each nominated for the Academy Award for Best Picture last year, and Canadian artists Joni Mitchell, Justin Bieber and The Weeknd each won Grammy Awards last year for their music.

- Does this type of success make you more or less likely to support Canadian content laws?

Heritage: Digital World

15 minutes

Let’s talk a bit about how things have changed over the last decade with a lot of content being available on the Internet.

- As more and more content moves online to places like iTunes and Netflix, do you think the government should treat online content differently than it treats TV and radio?
 - **IF TREATED DIFFERENTLY:** Do you say differently because you feel there should be no regulations for online, or because they need different types of regulations?

Canadian broadcasters are currently required to give 5% of their revenues from TV subscriptions to fund Canadian content. However, with fewer Canadians purchasing TV subscriptions, and more and more accessing content via the Internet and on their Smartphones, this could mean less funding for Canadian Content.

- Do you think Canadian Telecom companies should be required to pay a portion of the money they get from smartphones and internet to fund Canadian content, even if this means they would likely pass on the cost to subscribers?

Foreign companies like Netflix and iTunes do not need to devote any of their revenues to fund Canadian content.

- Do you think they should be required to, even if this once again means they would pass the cost on to subscribers?
- What do you think about giving people the option of making a voluntary \$2 contribution to support Canadian Content on their monthly Telecom or Netflix bill?
 - Would you choose this option?
 - Does your opinion change if it’s an opt-out? (you must pay this unless you check and say you don’t want to)
- If there was an online digital portal that brought together Canadian Content of all types, is this something you would be interested in visiting?
 - What if you had to pay for it?

- Would you support making telecom companies add an app to every smartphone sold in Canada that provides access to a variety of Canadian music, TV and films, even if it meant paying \$3 more for your phone, with all proceeds going to fund Canadian Content producers?

Now let's complete another few exercises...

Exercise #8: For each statement listed, indicate to what extent you believe this is a weak or strong argument in favour of the type of fees we talked about (using the thumb scale). Then, circle the statement that provides the strongest argument.

Exercise #9: Indicate whether you agree (thumb up) or disagree (thumb down) with each of the funding methods we discussed.

Discuss as a group, following the exercise:

- Which argument is the strongest? Why?
- Which ones are the weakest? What doesn't work with those?
- Which funding method do you most support?

Bank of Canada

15 minutes

- The Bank of Canada has said they're going to put a prominent Canadian woman on one of our bank notes. Has anyone heard about this? What are your thoughts on this?
- Currently:
 - Canada's first Prime Minister John A. MacDonald is on the \$5 bill
 - our first francophone Prime Minister Wilfrid Laurier is on the \$10
 - the Queen is on the \$20
 - our Prime Minister during WW2 Mackenzie King is on the \$50
 - our Prime Minister during WW1 Robert Borden is on the \$100.
- How do you feel about a prominent Canadian woman replacing one of these figures?
 - IF THEY THINK ONE FIGURE SHOULD BE REPLACED: Which one?
 - IF THEY SAY THE QUEEN SHOULD BE REPLACED: If they remove the Queen, that wouldn't be adding another woman, so does that defeat the purpose?
- The Bank of Canada has recently printed new \$100, \$50, and \$20 bills with security features and won't print new bills of those denominations for another decade. So how would you feel about a woman replacing Prime Minister MacDonald on the \$5 or Prime Minister Laurier on the \$10?
 - PROBE: Do you think it would send the wrong message if the woman is on the lowest value bill (\$5)?
 - What if they had the woman replace Prime Minister Laurier or Prime Minister MacDonald, but said they would re-introduce this former prime minister to the \$100 the next time they print it (IF ASKED: THIS WOULD REPLACE PRIME MINISTER BORDEN?)

- Another option would be to keep the current faces on the bills, and add a prominent woman to the other side. What are your thoughts on that?
 - PROBE: Would it be a less meaningful gesture for gender equality if they don't actually remove a male historical figure?

Thanks & Closure

That concludes our discussion. On behalf of the Government of Canada, thank you for your time and input



Innovation



Exercise #1

Familiar? <input checked="" type="checkbox"/> :	What this means to you...	
	Innovation	
	R & D	
	Social innovation	
	Clean growth	
	Inclusive growth	
	Knowledge economy	



Innovation



Exercise #2

Which of the following should be the focus? (Check one box for each statement <input checked="" type="checkbox"/>)			Check up to three <input checked="" type="checkbox"/> :
Encourage highly skilled and educated innovators to immigrate to Canada			
Increase skills training so that Canadians have the skills for innovative jobs			
Increase government funding for higher education			
Increase government funding for R & D			
Increase the number of researchers in the Canadian workforce			
Encourage innovative partnerships between business and research institutions			
Grow super clusters, to make Canada a hotbed for cutting edge innovation			
Encourage businesses to invest more in R & D			
Increase the number of small Canadian businesses who grow into world leaders			
Increase Canada's clean technology market share			
Position Canada to be a worldwide leader on 5G, the next generation of high-speed internet			
Make broadband and wireless internet accessible to all rural and low income Canadians			
Increase business investment in information and communication technologies			
Improve Canada's ranking on the World Bank "Ease of Doing Business" scale			
Increase R & D investments by foreign companies in Canada			
Make Canada the most business-friendly regulatory environment in the world for innovative businesses			
Reversing the 'brain drain' by encouraging innovative Canadians and businesses to stay in Canada			



Innovation

Exercise #3 If the Government of Canada has a goal of growing Canadian companies, which of the following are compelling ways to describe that goal? (thumbs up = compelling, thumbs down = not compelling)

Place a #1 next to the most compelling and a #2 next to the second-most compelling phrase		The Government of Canada is supporting innovative businesses so that they...			
	Grow into world leaders				
	Growing into billion dollar companies				
	Grow to become big employers				
	Grow to employ 1,000+ employees				
	Become the next Google or Tesla				



Exercise #4

Circle the words you associate with Canadian Content:

Exciting Outdated Diverse Uniform

Boring Modern Elitist Low Quality

Popular Unpopular Populist High Quality

Exercise #5

Examples of Canadian Content:

.....

.....

.....

.....

Exercise #6

Rate the quality of the following Canadian Content:

	Weak	Strong
Television	●	●
Movies	●	●
Theatre	●	●
Music	●	●



Exercise #7

Overall, has the quality of Canadian Content improved, worsened, or stayed the same over the past few years?

- ☐ Improved
- ☐ Worsened
- ☐ Stayed the same

Exercise #8

	Agree	Disagree
The way we consume content is changing rapidly, so we need to modernize to adjust.		
We need to change the regulation system because it isn't fair for only TV providers to be supporting Canadian Content when many Canadians are consuming content in other ways.		
Shrinking funding for Canadian Content is hurting Canadian artists, and so we need to make sure we support our artists so they will continue to have a chance to succeed.		
It is easier to access American content from Canada than ever before, so it is more important than ever that we protect Canadian culture.		

Exercise #9

	Circle One:
Make Telecoms contribute based on internet/phone revenue.	
Make foreign companies like Netflix contribute.	
Give Canadians the option to make a voluntary \$2 donation on their telephone bill.	
Add a \$3 application that provides Canadian content to every smartphone sold in Canada.	

Appendix B.4:
Group 10 (Toronto)

Moderator's Guide – FINAL

Focus Groups – Summer 2016

Introduction

10 minutes

- **Welcome:** Introduction self & research firm
- **Sponsor:** Groups on behalf of the Government of Canada
- **Length:** Our discussion should last about 2 hours, excuse yourself if needed during the session
- **Moderator Role:** Guide/encourage discussions/participation; keep on-time & on-topic
- **Your Role:** Share your opinions freely and honestly; no prep needed; not testing your knowledge
- **Process:** All opinions are important; looking to understand minority/majority of opinions; talk one at a time; interested in hearing from everyone
- **Logistic:** Audio/video taping for reporting; observation representing the government (mirror/video feed)
- **Confidentiality:** Your comments are anonymous; no names in reports; answers will not affect dealings with Government of Canada; Once finalized, the report can be accessed through the Library of Parliament or Archives Canada.
- **Participant Introduction:** First name, who they live with (relationship to them), and favourite hobby/pastime

Warm-Up

10 minutes

To begin...

- What have you seen, read or heard about the Government of Canada lately?

Innovation

45 minutes

Today, I will be asking you to complete a number of individual exercises. These will make sure I get your personal opinion. I'm going to pass out a placemat or worksheet. Let's look at the first few exercises...

Exercise #1 (2 from previous worksheet): Now, you'll see a list of terms. Please check which ones you are familiar with – and, if so, jot down what it means to you.

UPDATED LIST OF TERMS: INNOVATION, R&D, SOCIAL INNOVATION, CLEAN GROWTH, INCLUSIVE GROWTH, KNOWLEDGE ECONOMY

Discuss as a group following the exercise:

- Are there any terms you aren't familiar with? Which ones?
 - For those who have not heard about (TERM), what does it mean just based on the name?
Ask those familiar to hold their thoughts while the others answer first.
 - And for the others, what does (TERM) mean?

CLARIFY DEFINITION OF INNOVATION AND KNOWLEDGE ECONOMY AS NEEDED

- What do you think should be the greater priority for the Government of Canada:
 - encouraging growth of the knowledge economy or
 - encouraging growth in more established sectors, such as manufacturing and natural resources?

CLARIFY DEFINITION OF SOCIAL INNOVATION AS NEEDED

- Examples of social innovation include things like new technology to help charities raise money, or new tools to help homeless service providers prevent and reduce homelessness.
 - In terms of priorities, how does social innovation rank in terms of other innovation priorities?
 - Should it be a higher or lower priority for the Government of Canada than innovation geared towards improving quality of life or creating jobs?

BACKGROUND INFORMATION FOR THE MODERATOR:

- **Innovation:** the application of better solutions that meet new requirements, unarticulated needs, or existing market needs (e.g. technological innovations designed to save energy)
- **R & D:** work directed toward the innovation, introduction, and improvement of products and processes
- **Social innovation:** a novel solution to a social problem that is more effective, efficient, sustainable, or just than current solutions. The value created accrues primarily to society rather than to private individuals
- **Clean growth:** achieving economic growth, using clean technology, and allowing sustainable development (i.e. growing the economy while reducing emissions)
- **Inclusive growth:** economic growth that creates opportunity for all segments of the population and distributes the dividends of increased prosperity, both in monetary and non-monetary terms, fairly across society
- **Knowledge economy:** a system of consumption and production that is based on intellectual capital – i.e. the value of an organization's employee knowledge, business training and any proprietary information that may provide the company with a competitive advantage (e.g. research, technical support, consulting)

Exercise #2 (7 from previous workbook): Now let's have a look at another list of actions the government could implement. As we read through the list together, I would like you to place a checkmark next to each statement that you believe the Government of Canada should focus on to encourage innovation.

MODERATOR READS THE LIST WITH PARTICIPANTS COMPLETING THE EXERCISE. Then, take a moment to indicate which ones speak to you the most. Please select up to 3 statements. I will give you a moment.

- The first statement speaks of immigration. What categories of immigrants do we bring to Canada? Why are there different categories? Why do we bring in economic immigrants? What is their contribution, if any?
- What are your thoughts on the first statement "encourage highly skilled and educated innovators to immigrate to Canada"?
 - What do you see as the main reasons for doing this?
 - What do you see as the main reasons for not doing this?
 - What does "innovator immigrant" mean to you?
 - How should the Government of Canada find innovator immigrants?
- Each year, Canada allows a certain number of new immigrants into the country. If the Government of Canada wants to increase the number of innovator immigrants, it can either
 - a) increase the total number of new immigrants it allows each year, or

- b) keep the overall number the same, but decrease the number of other types of immigrants (e.g. family members of people already in Canada or refugees).

Which approach do you prefer?

- Does your opinion on bringing in more innovators change depending on which approach is used?
- Do you think bringing in innovator immigrants is more likely to **create more jobs for Canadians** (by innovators starting businesses), or **take jobs away from Canadians** (by innovators applying for existing jobs).

BACKGROUND INFORMATION FOR THE MODERATOR:

- In the last few years approximately 260,000 new immigrants came to Canada each year
- There are different categories of immigrants entering Canada:
 - The family members of people already in Canada
 - Economic immigrants including skilled workers, semi-skilled workers, entrepreneurs, and caregivers
 - Refugees

- What are your thoughts on the statement “reversing the brain drain”?
 - Do you think Canada is experiencing a brain drain?
 - IF YES: is this a problem for Canada?
- What are your thoughts on the statement “increase the number of small Canadian businesses who grow into world leaders”?
 - What do you see as the main reasons for doing this?
 - What do you see as the main reasons for not doing this?

Exercise #3 (new exercise): If the Government of Canada is setting a goal when it comes to growing Canadian companies, which would be the most compelling way to describe it? Circle a thumbs up for a compelling description and a thumbs down for one that isn’t compelling. Then on the LEFT side, put a #1 next to the most compelling statement, and a #2 next to the second most compelling statement.

- If the Government of Canada is setting a goal when it comes to growing Canadian companies, which of the following is the most compelling way to describe it:
 - The Government of Canada is supporting innovative businesses so that they:
 - grow into world leaders
 - growing into billion dollar companies
 - grow to become big employers
 - grow to employ 1,000+ employees
 - become the next Google or Tesla
- What are your thoughts on the statement “increase R & D investments by foreign companies in Canada”? What do you think this means? How would you explain “foreign investment”
 - What do you see as the main reasons for doing this?
 - What do you see as the main reasons for not doing this?

Exercise #4 (new exercise): Please tell me which of the following, if any, you think the federal government should be encouraging, based on the expression. (Circle a **thumbs up** if they should be encouraging it, a **thumbs down** if they should not be doing so – or don't know, if you don't have an opinion either way. Then **check which term** you are most comfortable with the government doing.

Exercise #5 (new exercise): Again using a thumbs up / thumbs down, please circle whether or not you agree or disagree with each of the statements about foreign investment. Then please put an 'x' next to which two are the strongest arguments in favour of foreign investment.

Those questions were more abstract, so I want you to imagine a situation where a big company from a country like China bought up a big Canadian company in your home province.

- What would your gut reaction be?
- What would you see as the possible benefits?
- What would be your concerns?
- What would be most important factors for the federal government to consider when deciding whether to approve to disapprove of the deal?

Heritage: Impressions of Canadian Content

15 minutes

For the next part of our discussion, we will talk about heritage in a bit more depth.

- When we talk about the “heritage sector” in Canada, what type of things come to mind?
 - Are you aware of any challenges facing this sector?
- Have you heard of the term “Canadian Content”?
- For those who have not heard about it, what does it mean just based on the name? **Ask those familiar to hold their thoughts while the others answer first.**
 - And for the others, what does “Canadian Content” refer to?

BACKGROUND INFORMATION FOR THE MODERATOR:

Canada's Broadcasting Act declares that the Canadian broadcasting system should encourage the development of Canadian expression by:

- Providing a wide range of programming that reflects Canadian attitudes, opinions, ideas, values, and artistic creativity
- Displaying Canadian talent in entertainment programming
- Offering information and analysis concerning Canada and other countries from a Canadian point of view

Today, I will be asking you to complete a number of individual exercises. These will make sure I get your personal opinion. I'm going to pass out a worksheet. Let's look at the first few exercises...

Exercise #6: Circle the words you associate with Canadian content. You can circle as few or as many as you think are relevant. **FOR QUEBEC GROUPS:** When I speak of Canadian content, it also means Quebec content.

Exercise #7: Then, jot down a few examples of Canadian content that come to mind. It can be anything.

Exercise #8: There are different types of Canadian content listed. For each, mark on the scale how weak or strong you believe this type of content is, from a quality standpoint.

Exercise #9: Finally, indicate if you believe that overall, Canadian content has improved, worsened, or stayed the same over the past few years.

Discuss as a group, following the exercise:

- What examples of Canadian content did you provide?
- What words best describes Canadian content?
- How, if at all, as it changed in the past few years?
- **ASK OUTSIDE OF QUEBEC ONLY:** Do you pay attention to whether the content you consume is Canadian or not?
 - Do you feel different when you see or hear content which you know is Canadian, compared to American? If so, how do you feel?

Heritage: Protection

10 minutes

- Have you heard of any laws in Canada that applies to Canadian content?
 - If so, what are they? What are they for?

BACKGROUND INFORMATION FOR THE MODERATOR:

Canada's Broadcasting Act sets out objectives to ensure that Canadian broadcasting content meets the needs and interests of Canadians. The Canadian Radio-television and Telecommunications Commission (CRTC) then sets policies and rules to ensure that those objectives are put into practice in Canada's broadcasting system. The CRTC currently requires broadcasters air a certain percentage of content that is defined as Canadian.

Generally for music to qualify as Canadian content at least 2 of the following conditions must be met:

- the music is composed entirely by a Canadian
- the music is, or the lyrics are, performed principally by a Canadian
- the music is recorded wholly in Canada, or performed wholly in Canada and broadcast live in Canada
- the lyrics are written entirely by a Canadian

For programming, a Canadian program is defined by its Canadian creative contributors (i.e. the producer, director, lead performers, etc.) .

- **ASK IN QUEBEC ONLY:** Are Canadian content laws relevant in Quebec?
 - What impact, if any do they have on Quebec artists? Do they help them? How so?

Some say that the free market should decide whether cultural content is successful or not, while others think the Canadian government needs to get involved to make sure Canadian content can be successful.

- Do you think the government should be intervening to protect and promote Canadian content?
 - What are the strongest reasons to support or not to support Canadian content and Canadian content creators? **MODERATOR TO LIST ON FLIP CHART**
 - **PROBE:** Are there any economic benefits? What specifically?
- What, if anything, do you think would change if the government stopped supporting content creators?
- Who do you think benefits most from Canadian content laws?

- **IF CANADIAN ARTISTS ONLY:** Would that be all artists equally or some more so than others?
PROBE FOR: big names, those struggling to get started, actors, musicians, those who help produce content, etc.

ASK OUTSIDE OF QUEBEC ONLY:

There have been examples of Canadian content finding success in recent years. The Canadian TV show “Orphan Black” was nominated for an Emmy award this year, Canadian movies “Room” and “Brooklyn” were each nominated for the Academy Award for Best Picture last year, and Canadian artists Joni Mitchell, Justin Bieber and The Weeknd each won Grammy Awards last year for their music.

- Does this type of success make you more or less likely to support Canadian content laws?

Heritage: Digital World

15 minutes

Canadian broadcasters are currently required to give 5% of their revenues from TV subscriptions to fund Canadian content. However, with fewer Canadians purchasing TV subscriptions, and more and more accessing content via the Internet and on their Smartphones, this could mean less funding for Canadian Content.

- Do you think Canadian Telecom companies should be required to pay a portion of the money they get from smartphones and internet to fund Canadian content?
- Do you think companies would likely pass on the cost to subscribers?
- Foreign companies like Netflix and iTunes do not need to devote any of their revenues to fund Canadian content. Do you think they should be required to, even if this once again means they would pass the cost on to subscribers?
- What do you think about giving people the option of making a voluntary \$2 contribution to support Canadian Content on their monthly Telecom or Netflix bill?
 - Would you choose this option?
 - Does your opinion change if it's an opt-out? (you must pay this unless you check and say you don't want to)
- If there was an online digital portal that brought together Canadian Content of all types, is this something you would be interested in visiting?
 - What if you had to pay for it?
- Would you support making telecom companies add an app to every smartphone sold in Canada that provides access to a variety of Canadian music, TV and films, even if it meant paying \$3 more for your phone, with all proceeds going to fund Canadian Content producers?

Now let's complete another few exercises...

Exercise #10: For each statement listed, indicate to what extent you believe this is a weak or strong argument in favour of the type of fees we talked about (using the thumb scale). Then, circle the statement that provides the strongest argument.

Exercise #11: Indicate whether you agree (thumb up) or disagree (thumb down) with each of the funding methods we discussed.

Discuss as a group, following the exercise:

- Which argument is the strongest? Why?
- Which ones are the weakest? What doesn't work with those?
- Which funding method do you most support?

Bank of Canada**15 minutes**

- The Bank of Canada has said they're going to put a prominent Canadian woman on one of our bank notes. Has anyone heard about this? What are your thoughts on this?

Currently:

- our first francophone Prime Minister Wilfrid Laurier is on the \$5
 - Canada's first Prime Minister John A. MacDonald is on the \$10 bill
 - Queen Elizabeth II is on the \$20 bill
 - our Prime Minister during WW2 Mackenzie King is on the \$50 bill
 - our Prime Minister during WW1 Robert Borden is on the \$100 bill
- How do you feel about a prominent Canadian woman replacing one of these figures?
 - **IF THEY THINK ONE FIGURE SHOULD BE REPLACED:** Which one?
 - **IF THEY SAY THE QUEEN SHOULD BE REPLACED:** If they remove the Queen, that wouldn't be adding another woman, so does that defeat the purpose?
 - The Bank of Canada has recently printed new \$100, \$50, and \$20 bills with security features and won't print new bills of those denominations for another decade. So how would you feel about a woman replacing Prime Minister MacDonald on the \$10 or Prime Minister Laurier on the \$5?
 - Do you think it would send the wrong message if the woman is on the lowest value bill (\$5)?
 - What if they had the woman replace Prime Minister Laurier or Prime Minister MacDonald, but said they would re-introduce this former prime minister to the \$100 the next time they print it?

IF ASKED: THIS WOULD REPLACE PRIME MINISTER BORDEN
 - Another option would be to keep the current faces on the bills, and add a prominent woman to the other side. What are your thoughts on that?
 - Would it be a less meaningful gesture for gender equality if they don't actually remove a male historical figure?

Thanks & Closure

That concludes our discussion. On behalf of the Government of Canada, thank you for your time and input



Innovation



Exercise #1

Familiar? <input checked="" type="checkbox"/> :	What this means to you...	
	Innovation	
	R & D	
	Social innovation	
	Clean growth	
	Inclusive growth	
	Knowledge economy	



Innovation



Exercise #2

Which of the following should be the focus? (Check one box for each statement <input checked="" type="checkbox"/>)			Check up to three <input checked="" type="checkbox"/> :
Encourage highly skilled and educated innovators to immigrate to Canada			
Increase skills training so that Canadians have the skills for innovative jobs			
Increase government funding for higher education			
Increase government funding for R & D			
Increase the number of researchers in the Canadian workforce			
Encourage innovative partnerships between business and research institutions			
Grow super clusters, to make Canada a hotbed for cutting edge innovation			
Encourage businesses to invest more in R & D			
Increase the number of small Canadian businesses who grow into world leaders			
Increase Canada's clean technology market share			
Position Canada to be a worldwide leader on 5G, the next generation of high-speed internet			
Make broadband and wireless internet accessible to all rural and low income Canadians			
Increase business investment in information and communication technologies			
Improve Canada's ranking on the World Bank "Ease of Doing Business" scale			
Increase R & D investments by foreign companies in Canada			
Make Canada the most business-friendly regulatory environment in the world for innovative businesses			
Reversing the 'brain drain' by encouraging innovative Canadians and businesses to stay in Canada			



Innovation

Exercise #3 If the Government of Canada has a goal of growing Canadian companies, which of the following are compelling ways to describe that goal? (thumbs up = compelling, thumbs down = not compelling)

Place a #1 next to the most compelling and a #2 next to the second-most compelling phrase		The Government of Canada is supporting innovative businesses so that they...			
	Grow into world leaders				
	Growing into billion dollar companies				
	Grow to become big employers				
	Grow to employ 1,000+ employees				
	Become the next Google or Tesla				



Foreign Investment

Exercise #4

The government should be doing each of the following...

	Circle One:		Which term?
Foreign investment			
Global investment			
International investment			
International partnerships			



Foreign Investment

Exercise #5

Foreign investment...

	Circle One:		X
Provides businesses with money they need to grow and hire more employees			
Brings in new technology, different perspectives, and innovative ways of doing things			
Opens up trade opportunities and markets for Canadian companies in other countries			
Provides more tax revenue for the Government of Canada			
Injects more money into Canada, growing the Canadian economy			
Keeps Canadian companies alive, who might otherwise go bankrupt due to lack of investment			

Exercise #6

Circle the words you associate with Canadian Content:

Exciting Outdated Diverse Uniform

Boring Modern Elitist Low Quality

Popular Unpopular Populist High Quality

Exercise #7

Examples of Canadian Content:

.....

.....

.....

.....

Exercise #8

Rate the quality of the following Canadian Content:


























	Weak	Strong
Television	●	●
Movies	●	●
Theatre	●	●
Music	●	●

Exercise #9

Overall, has the quality of Canadian Content improved, worsened, or stayed the same over the past few years?

- ☐ Improved
- ☐ Worsened
- ☐ Stayed the same

Exercise #10

	Agree				Disagree
The way we consume content is changing rapidly, so we need to modernize to adjust.					
We need to change the regulation system because it isn't fair for only TV providers to be supporting Canadian Content when many Canadians are consuming content in other ways.					
Shrinking funding for Canadian Content is hurting Canadian artists, and so we need to make sure we support our artists so they will continue to have a chance to succeed.					
It is easier to access American content from Canada than ever before, so it is more important than ever that we protect Canadian culture.					
Supporting Canadian content will help our economy by employing thousands of Canadians who work directly and indirectly in the culture sector, at things like film/TV/music production, historic sites, and festivals."					

Exercise #11

Circle One:	
Make Telecoms contribute based on internet/phone revenue.	<input type="radio"/>  <input type="radio"/> 
Make foreign companies like Netflix contribute.	<input type="radio"/>  <input type="radio"/> 
Give Canadians the option to make a voluntary \$2 donation on their telephone bill.	<input type="radio"/>  <input type="radio"/> 
Add a \$3 application that provides Canadian content to every smartphone sold in Canada.	<input type="radio"/>  <input type="radio"/> 