

Research Report

Focus Groups on the Economy Privy Council Office

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Introduction

Walker Consulting Group is pleased to present this report of findings from a qualitative research program which involved an investigation of Canadian impressions of the current state of the economy, factors affecting the future state of the economy, and their sense of personal economic well-being now and into the future.

The Canadian economic mood has fluctuated quite widely over the past 2 years. Overall consumer confidence moved rapidly downward in late 2008, then upward in early 2009, a trend that continued until early 2010. However, since then, consumer confidence has been eroding slightly, though it appears to have leveled off at the time of this report. But different segments of Canadians, both demographic and geographic, have exhibited attitudinal sentiments that do not follow the overall pattern. Retired Canadians, for example, have remained more uneasy about the state of the economy than those employed in middle to higher income groups, because while unemployment rates have steadied, stock markets have continued to show significant volatility. Those resident in certain geographic regions, such as central and southern Ontario, have not returned to levels of economic confidence found before the economic downturn, in significant part because the employment situation in those regions has not recovered.

It is owing to the subject's complexity and this continually evolving economic climate, that the Privy Council Office commissioned this research. Its core purpose is to help ensure that the Government of Canada understand the attitudinal dimensions of the economic mood that macroeconomic data cannot easily capture and reflect.

To lend insight to these issues, Walker Consulting Group conducted focus groups in five locations across the country. These groups were conducted with members of the general population, divided into groups of lower and middle income, and higher income households.

A total of ten focus groups were held with members of the general population – two groups in each of the following cities: North Vancouver, Winnipeg, Mississauga, Kitchener/Waterloo, and Montreal. The following table outlines the distribution of the groups in terms of date, location, language and target audience:

City	Date	Language	Lower/ Middle income	Higher income
North Vancouver	September 13, 2010	English	1	1
Winnipeg	September 14, 2010	English	1	1
Kitchener	September 15, 2010	English	1	1
Montreal	September 15, 2010	French	1	1
Mississauga	September 16, 2010	English	1	1
Total	--	--	5	5

The groups were conducted between September 13 and 16, 2009. Walker Consulting Group coordinated simultaneous translation services for the French groups in Montreal. The focus groups were standard groups, two hours in length, with between eight (8) and ten (10) participants each.

Sessions began at 5:30pm and 7:30pm each evening, and participants were given an honorarium of \$75 in appreciation for their time.

This report begins with an executive summary highlighting key findings from the focus groups followed by detailed results of the qualitative findings. Appended to this report are the recruitment screener and discussion guide (in English and French).

NOTE: For the purposes of this report, it is important to note that focus group research is a form of scientific, social, policy and public opinion research. As structured, restricted, group interviews that proceed according to a careful research design and attention to the principles of group dynamics, focus groups should be distinguished from “discussion groups”, “problem-solving groups”, “buzz groups”, or “brainstorming groups”. They are not designed to help a group reach a consensus or to make decisions, but rather to elicit the full range of ideas, attitudes, experiences and opinions of a selected sample of participants on a defined topic. Because of the small numbers involved, however, the participants cannot be expected to be thoroughly representative in a statistical sense of the larger population from which they are drawn and findings cannot reliably be generalized beyond their number.

Executive Summary

Walker Consulting Group is pleased to present this report of findings from a qualitative research program which involved an investigation of Canadian impressions of the current state of the economy, factors affecting the future state of the economy, and their sense of personal economic well-being now and into the future.

Between September 13 and 16, ten focus groups were conducted with Canadians in North Vancouver, Winnipeg, Mississauga, Kitchener, and Montreal (two groups per city). The general population groups were segmented based on household income: one group in each city comprised participants with lower to middle household incomes (based on household size) and the other group was held with participants in higher income groups (based on household size).

The groups explored a variety of topics related to Canada's economy, including the overall mood of the country, the current and future state of the economy, key challenges, and current and potential actions the federal government could pursue to address the present recession. In addition, the discussions touched upon the economic dimensions of issues like government spending and deficits, health care, immigration, and education. The total cost to complete this research was \$66,892.40 (including HST).

The Current State of the Economy

Most participants who participated in this research signaled that while the economy has stabilized, it remains vulnerable. Only some of those in these groups were prepared to suggest that the economy has "turned a corner", and as the analysis below shows, this is almost entirely ascribed to concerns that the U.S. economy will continue to be a drag on Canada's economy. A few believe the economy is currently on a downward trajectory, but most believe things have leveled off.

Nationwide, among those in higher income groups, there were a range of issues identified as the most important to focus on for the federal government, with the economy being raised slightly more often than other issues. The fact that other issues were often raised is a signal that negative perceptions of the economy have stabilized among that half of the Canadian populace compared to a year ago. Among lower income participants, the economy was raised as the prime issue by most participants overall. While words like *vulnerable* and *fragile* were used to describe the economy, words like *stable* and *promising* were

equally likely to be used. If we were to ascribe a phrase to the overall mood, we would call it *guarded* optimism.

Overall, the words most often used to describe the current state of the economy were:

- Vulnerable
- Fragile
- Recovering
- Stable
- Promising

At a theoretical level, Canadians in these groups signaled that things are going reasonably well, certainly relative to other countries. But practically, and at a micro-scale, deep-seated anxieties reared their head in virtually every group.

The words stability and promising were almost entirely described in the context of Canada's economy, usually in reference to Canada's natural resources, and/or to the capabilities of Canadians. The words fragile and vulnerable were almost always described in regard to Canada's dependence on the weak US economy primarily, and to a lesser extent the global economy and potential contagion affects of financial issues like the one currently faced by Greece.

In southwestern Ontario, the tone of the groups was different than found in previous waves of research. There was a greater sense of optimism about the future, a sense that the region had begun to move on from its very high dependence on lower-skill manufacturing, and toward technology industry and higher-skill manufacturing. There remains a focus on economic concern, but less pessimism than found in the past.

The Future of Canada's Economy

Most say they are quite optimistic about the Canadian economy in the medium term (3-5 year timeframe), but believe the state of the economy will largely be the same over the next year, unless things deteriorate significantly in the US or in the global economy, which would obviously have a negative affect.

The medium term sentiment is almost entirely driven by perceptions about the U.S. economy and is typically fuelled by three or four factors:

- The natural resources Canada possesses

- The growing orientation (which was hoped to be furthered in coming years) on China and Asia as an economic partner
- A sense that Canadians by nature are hard-working, versatile, and capable
- A recognition that Canada has an aging population, and that this will impose costs on the society as a whole, through health care as well as retirement and pension costs.
- A recognition that if the U.S. economy falters again, all of these positives will likely not outweigh the negative affect that this will have on Canada's economy.

Stimulus Spending

There was a high degree of familiarity with federal government initiatives to help facilitate economic growth through the recessionary period. Many were as quick to cite tax incentives like the credit for children's sporting activities or the tax free savings account as infrastructure spending. With some caveats, there was a recognition that the stimulus spending had helped mitigate the downside of the recession.

In the groups across Ontario the prevailing view was that there should continue to be some form of stimulus spending. In the groups across the west, opinion was more mixed, but a majority were of a mind to believe that stimulus spending ought to be eased. Some felt continued infrastructure spending was required, and therefore should continue, while others felt that the tax credits were a good incentive for Canadians to continue spending, even when they may have an instinct to save, given the precarious nature of the U.S. economy. The reasons for continued stimulus spending tended to be more about addressing continuing needs than helping to manage the recession.

In the end, many participants preferred that some form of stimulus spending continue, and that the federal government should make efforts to reduce this spending gradually, and not to eliminate it right away, or all at once. At the very least, participants signaled that the government should allow spending already allocated to run its course, even if that spending goes beyond the March 2011 deadline.

The Deficit

Virtually everyone in the groups knew that the federal government is in a deficit. There were very few that had a sense of the size or impact of the deficit. Some participants expressed a point of view that Canada's deficit was not as large or as significant as the deficits that faced other countries, and by inference, that the deficit was only of modest concern. A handful of others expressed a more disconcerting view of the deficit, expressing significant concern about its size, citing the fact that the deficit is now larger than it was in 1995 when the government of the time took aggressive measures to tackle it.

While this fact (when raised) was of some concern, the prevailing view was that the current deficit situation is not as grave as that of the mid-90s, because of the current state of interest rates, and because other countries' situations are far worse, meaning that there would likely be a lot more pressure placed on other countries to get their deficits down than on Canada.

While few like the idea of a deficit, most characterized the current deficit as something that was manageable and appropriate given the circumstances facing the economy. There was minimal appetite for an aggressive approach to the deficit at this point in time. The rationale that was most clearly expressed was that in order to reduce the deficit more aggressively it might have a constricting effect on the still recovering economy, and would inevitably yield widespread cuts to programs and services like Health Care.

Role of Government of Canada

When asked about the role of the federal government in assisting the economy, most wanted the government to lay the groundwork for future growth, rather than focus on economic recovery. This framework would address budgetary matters (tackling the deficit and the debt), economic heterogeneity (increased secondary and tertiary manufacturing; decreased raw material exporting), inter-provincial trade barriers (lessening/removing these barriers), and international trade relationships (more international trade partners; decreased reliance on the US).

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Walker Consulting Group certifies that the final deliverables comply with the political neutrality requirement in section 6.2.4 of the Procedures for Planning and Contracting Public Opinion Research in the Government of Canada.

Sommaire

Walker Consulting Group a le plaisir de soumettre ce rapport qui présente les résultats du programme de recherche qualitative dans le cadre duquel les Canadiens ont fait l'objet d'une enquête pour connaître leurs impressions à propos de l'état actuel de l'économie et des facteurs qui ont une incidence sur l'état futur de l'économie ainsi que l'idée qu'ils se font de leur propre bien-être économique tant maintenant que pour l'avenir.

Du 13 au 16 septembre, dix groupes de discussion ont eu lieu à North Vancouver, Winnipeg, Mississauga, Kitchener et Montréal (deux groupes dans chacune de ces villes). Les groupes, composés de Canadiens du grand public, étaient segmentés en fonction du revenu du ménage : dans chaque ville, un groupe réunissait des participants dont le revenu du ménage était bas ou moyen (en fonction de la taille du ménage) et l'autre, des participants dont le revenu du ménage était élevé (en fonction de la taille du ménage).

Les groupes ont permis d'explorer divers sujets relatifs à l'économie du Canada, dont l'humeur générale du pays, l'état actuel et futur de l'économie, les principaux défis ainsi que les mesures que le gouvernement fédéral pourrait prendre, maintenant ou plus tard, pour s'attaquer à la récession actuelle. En outre, les groupes de discussion ont porté sur les dimensions économiques de certains enjeux tels que les dépenses et les déficits du gouvernement, les soins de santé, l'immigration et l'éducation. Le coût total de la recherche s'élève à 66 892,40 \$ (TVH incluse).

L'état actuel de l'économie

La plupart de ceux qui ont participé à la recherche ont mentionné que même si l'économie s'est stabilisée, elle demeure néanmoins vulnérable. Dans ces groupes, seulement quelques participants étaient prêts à admettre que l'économie « a pris un nouveau tournant » et, comme il appert de l'analyse qui suit, cela est presque entièrement dû aux inquiétudes par rapport à l'économie américaine qui pourrait continuer de porter atteinte à l'économie canadienne. Quelques participants croient que l'économie suit actuellement une trajectoire descendante, mais la plupart d'entre eux croient que la situation s'est stabilisée.

À l'échelle nationale, les gens dans les groupes à revenu plus élevé ont soulevé un éventail d'enjeux sur lesquels le gouvernement fédéral devrait le plus concentrer ses efforts, mais l'économie a été mentionnée un peu plus souvent que les autres enjeux. Le fait que les gens aient souvent mentionné d'autres enjeux révèle que, comparativement à il y a un an, les impressions négatives par

rapport à l'économie se sont stabilisées dans cette moitié de la population canadienne. Dans les groupes à revenu moins élevé, dans l'ensemble, les participants ont le plus souvent cité l'économie comme étant le principal enjeu. Bien qu'ils aient utilisé des termes comme *vulnérable* et *fragile* pour décrire l'économie, ils ont tout aussi fréquemment utilisé les termes *stable* et *prometteuse*. Si nous devons choisir une expression pour définir l'humeur générale, nous utiliserions l'expression optimisme *prudent*.

Dans l'ensemble, les termes qui sont revenus le plus souvent pour décrire l'économie actuelle sont :

- Vulnérable
- Fragile
- En rétablissement
- Stable
- Prometteuse

D'un point de vue théorique, les Canadiens de ces groupes ont indiqué que les choses vont relativement bien, surtout en comparaison de ce qui se passe dans d'autres pays. Mais en pratique, et à micro-échelle, il n'en demeure pas moins que dans presque tous les groupes, des anxiétés bien ancrées ont refait surface.

Les termes stable et prometteuse ont presque toujours été utilisés dans le contexte de l'économie canadienne, habituellement en référence aux ressources naturelles du Canada ou aux capacités des Canadiens. Les termes fragile et vulnérable ont presque toujours été utilisés pour décrire la dépendance du Canada, tout d'abord envers l'économie américaine présentement affaiblie et, dans une moindre mesure, envers l'économie mondiale et l'effet de contagion que pourraient avoir certains problèmes économiques comme ceux qui touchent la Grèce en ce moment.

Dans le sud-ouest de l'Ontario, le ton avait changé par rapport à celui observé lors des vagues précédentes de la recherche. Les participants ont fait preuve d'un plus grand optimisme par rapport à l'avenir. Ils avaient aussi l'impression que la région commençait à s'éloigner de sa très grande dépendance à l'industrie de la fabrication qui demande des employés peu qualifiés, pour se tourner de plus en plus vers les industries de la technologie et de la fabrication qui demandent des employés plus qualifiés. L'économie préoccupe toujours les participants, mais ils sont moins pessimistes que par le passé.

L'avenir de l'économie canadienne

La plupart des participants disent qu'ils sont passablement optimistes par rapport à l'économie du Canada à moyen terme (les 3 à 5 prochaines années), mais ils croient néanmoins que l'état de l'économie demeurera essentiellement le même au cours de la prochaine année, à moins que les choses s'enveniment beaucoup dans l'économie américaine ou dans l'économie mondiale, ce qui aurait bien sûr une incidence négative.

À moyen terme, les sentiments des participants sont presque toujours nourris par leurs perceptions à l'égard de l'économie américaine, et ils sont généralement alimentés par cinq facteurs :

- Les ressources naturelles du Canada.
- L'orientation croissante (qu'ils espèrent voir se poursuivre au cours des prochaines années) vers la Chine et l'Asie en tant que partenaires économiques.
- Ils perçoivent les Canadiens comme étant des êtres qui, de nature, sont travailleurs, polyvalents et capables.
- Ils reconnaissent que la population du Canada est vieillissante, ce qui engendrera des coûts pour toute la société tant au chapitre des soins de santé qu'au chapitre des coûts de retraite et des pensions.
- Ils reconnaissent que si l'économie américaine chancelle de nouveau, tous ces positifs ne seront probablement pas suffisants pour contrebalancer l'effet négatif que cela aurait sur l'économie canadienne.

Dépenses de stimulation

Les participants étaient généralement au courant des initiatives mises en place par le gouvernement fédéral pour favoriser la croissance économique pendant la période de récession. Nombre d'entre eux ont cité tout aussi rapidement les incitatifs fiscaux tels que le crédit d'impôt pour les activités sportives des enfants et le compte d'épargne libre d'impôt que les dépenses d'infrastructure. Malgré qu'ils ne soient pas tous du même avis, les participants reconnaissent que le plan de relance a aidé à atténuer les effets négatifs de la récession.

Dans les groupes en Ontario, l'opinion qui prévaut chez les participants est que certaines mesures de stimulation devraient se poursuivre. Dans les groupes de l'ouest du pays, les opinions étaient plus partagées, mais la majorité des participants pensaient que le gouvernement devrait réduire les dépenses de stimulation. Certains participants croient qu'il faut continuer d'engager certaines dépenses d'infrastructure, alors que d'autres croient que les crédits d'impôt sont un bon moyen d'inciter les Canadiens à continuer de dépenser, même si leur instinct leur dit d'épargner compte tenu de la précarité de l'économie américaine. De façon générale, les raisons que les participants

invoquent pour expliquer pourquoi le gouvernement devrait continuer d'engager des dépenses de stimulation concernent plus la nécessité de répondre aux besoins continus que celle d'aider à gérer la récession.

En fin de compte, de nombreux participants préféreraient que le gouvernement fédéral continue d'engager certaines formes de dépenses de stimulation. En outre, ils croient que le gouvernement devrait faire des efforts pour réduire ces dépenses graduellement, sans toutefois les éliminer tout de suite ou toutes les éliminer en même temps. Les participants indiquent que le gouvernement devrait à tout le moins permettre de terminer les projets pour lesquels des dépenses ont déjà été autorisées, même si elles devaient se poursuivre au-delà de la date butoir de mars 2011.

Detailed Findings

Walker Consulting Group is pleased to present this report of findings from a qualitative research program which involved an investigation of Canadian impressions of the current state of the economy, factors affecting the future state of the economy, and their sense of personal economic well-being now and into the future.

Between September 13 and 16, ten focus groups were conducted with Canadians in North Vancouver, Winnipeg, Mississauga, Kitchener, and Montreal (two groups per city). The general population groups were segmented based on household income: one group in each city comprised participants with lower to middle household incomes (based on household size) and the other group was held with participants in higher income groups (based on household size).

The groups explored a variety of topics related to Canada's economy, including the overall mood of the country, the current and future state of the economy, key challenges, and current and potential actions the federal government could pursue to address the present recession. In addition, the discussions touched upon the economic dimensions of issues like government spending and deficits, health care, immigration, and education.

The findings from this research are presented below, organized by theme:

Mood of The Country

These focus groups found that the country remains highly attentive to the state of the economy, and factors or forces that have the potential to negatively affect what many describe as a fragile economic situation. While Canadians acknowledge that our country continues to fare better than other places in the world, they strongly believe that the U.S. economy is mired in an economic circumstance that they may never truly recover from. And they fear that as a result, Canadians may not return to a level of prosperity enjoyed over the past two decades. While the external forces are clearly driving concern at a macro level, internal concerns, such as the cost of taking care of Canada's aging population, and refugee and immigration related issues, are exacerbating already existent anxiety about the state of the economy, and for them, their personal economic circumstances.

Indeed, in a number of the groups, the state of Canada's health care system was often raised as a point of concern that dampened overall perceptions of the

mood of the country. Many are concerned that coupled with pre-existing weakness in the health care system, a protracted economic downturn will worsen the state of the health system and threaten its sustainability. In the groups where this was raised, there were clear anxieties in evidence, particularly among retired participants. For Canadians, health care is viewed as an economic issue, as much as the state of the dollar or interest rates are.

When asked about the top issue facing the country, a plurality of participants raised the economy and jobs, the others raised health care and immigration/refugee issues. Recent migrant refugees coming to Canada was also on the minds of many participants - across the country, but particularly in the west - triggering discussions of the associated costs involved when undertaking the integration and accommodation of new entrants.

Those in lower income groups, as well as retired or pre-retired participants were most likely to cite the economy as a concern.

The Current State of the Economy

Most participants who participated in this research signaled that while the economy has stabilized, it remains vulnerable. Only some of those in these groups were prepared to suggest that the economy has “turned a corner”, and as the analysis below shows, this is almost entirely ascribed to concerns that the U.S. economy will continue to be a drag on Canada’s economy. A few believe the economy is currently on a downward trajectory, but most believe things have leveled off.

Nationwide, among those in higher income groups, there were a range of issues identified as the most important to focus on for the federal government, with the economy being raised slightly more often than other issues. The fact that other issues were often raised is a signal that negative perceptions of the economy have stabilized among that half of the Canadian populace compared to a year ago. Among lower income participants, the economy was raised as the prime issue by most participants overall. While words like *vulnerable* and *fragile* were used to describe the economy, words like *stable* and *promising* were equally likely to be used. If we were to ascribe a phrase to the overall mood, we would call it *guarded* optimism.

Overall, the words most often used to describe the current state of the economy were:

- Vulnerable

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At a theoretical level, Canadians in these groups signaled that things are going reasonably well, certainly relative to other countries. But practically, and at a micro-scale, deep-seated anxieties reared their head in virtually every group.

The words stability and promising were almost entirely described in the context of Canada's economy, usually in reference to Canada's natural resources, and/or to the capabilities of Canadians. The words fragile and vulnerable were almost always described in regard to Canada's dependence on the weak US economy primarily, and to a lesser extent the global economy and potential contagion affects of financial issues like the one currently faced by Greece.

Almost a person, participants in all groups were deeply concerned about the precarious state of the US economy. There is continuing widespread anxiety about what the future holds for the U.S., and by consequence, what that might mean for Canada.

Unaided prompting of primary economic concerns exclusive to Canada focused on the aging population (and the costs this will impose on society for health care, pensions, etc), interest rates, government waste, and deficit management. One more significant long term trend that was of concern was the foreign purchase of Canadian resource companies. In some groups, this was a very significant concern, in others less so. But none of these were deemed anywhere near as pressing, or significant to Canada's future, as the state of the U.S. economy.

In different parts of the country, there were wider attitudinal differences found among the lower income groups. In the west, and in Quebec, impressions among the lower income groups were similar to the higher income groups - while there were vulnerabilities, the overall sentiment was positive, more positive than identified in recent waves of research. There was a blend of optimism and pessimism about the overall economy, mixed in with some concerns about personal economic circumstances (cost of living and debt levels, particularly in Vancouver). For some, other issues were a higher priority than the economy.

In Ontario, there were wider gaps, particularly between lower and higher income groups. In lower income groups in the two Ontario centres where this

research took place (Kitchener and Mississauga), the economy remained firmly the number one issue. It was cited as the major concern by virtually all participants in those groups.

There was a general sense in Ontario that a “new normal” in terms of the economy has set in – one which involved the continuing movement away from manufacturing and toward other higher skill (but lower number of) jobs in the economy. This “new normal” involves higher levels of economic uncertainty, and slightly higher levels of overall unemployment. As such, there is less of a sense that the economy will rapidly rise upward, but may not necessarily continue downward, at least in the near term. The prevailing perception is that hopefully Canada will remain stable and hopefully gain some steam in the medium-term.

This undercurrent of continuing anxiety was found in the Vancouver groups as well, although unlike Ontario, it was not driven by discussions of a post-manufacturing economy. Rather, it was driven by concerns about the base standard of living that they have and can expect to have in future. There was a belief widely held in Vancouver groups that the standard of living has not adjusted to the state of the economy, that the cost of living overall is misaligned with the incomes of most households. As a result people were having to live at a lower standard of living than had been the case in the past, and expect to do that in future. Several retired and pre-retired participants signaled that they believe the current and next generation will not enjoy the standard of living that they have enjoyed.

Most indicated that they believe the recession is over, but the economy could slip back into recession fairly easily. Because of this, there is uncertainty in terms of consumer confidence.

Canadians use a range of reference points to gauge the relative health of the economy. As found in the past, we observed that there was as much or more reliance on microeconomic considerations than macroeconomic considerations in drawing conclusions, and those in lower income households were often highly likely to use micro-level considerations exclusively in forming their opinion about the state of the economy. Factors that were most widely used as reference points:

- Stability and security of employment among themselves, colleagues, and friends
- The local/regional real estate market

- The extent to which they observe many people in their communities renovating their homes

Specific probing on the issue of interest rates yielded heightened concern about potential rising rates in Vancouver, and an acknowledgement that rising rates may cause harmful affects on many homeowners that they know, whose mortgage payments could quickly escalate. However, in many cities, there was relatively little concern that interest rate hikes would come to pass in any significant way, because of the overall state of both Canada's economy and the U.S. economy.

One of the more interesting findings in this research as compared to recent waves was very little discussion of the high Canadian dollar and its negative implications for the economy. When it was raised in these groups, there was a general sense that Canadian industry was likely getting used to the dollar at its current exchange rate, whereas in the past there was a fair degree of concern about the implications of a high dollar for the health of Canada's economy.

The Future of Canada's Economy

Most say they are quite optimistic about the Canadian economy in the medium term (3-5 year timeframe), but believe the state of the economy will largely be the same over the next year, unless things deteriorate significantly in the US or in the global economy, which would obviously have a negative affect.

The medium term sentiment is almost entirely driven by perceptions about the U.S. economy. Immigration and refugee accommodation and integration issues were also raised as a drag on the economy. Costs associated with dealing with significant numbers of migrant refugees coming to Canada was on the minds of many participants, across the country, but particularly in the west.

The medium term sentiment is typically fuelled by three or four factors:

- The natural resources Canada possesses
- The growing orientation (which was hoped to be furthered in coming years) on China and Asia as an economic partner
- A sense that Canadians by nature are hard-working, versatile, and capable
- A recognition that Canada has an aging population, and that this will impose costs on the society as a whole, through health care as well as retirement and pension costs.

- A recognition that if the U.S. economy falters again, all of these positives may not outweigh the negative affect that this will have on Canada's economy.

That said, in southwestern Ontario, the tone of the groups when discussing the future was different than found in previous discussions. There was a greater sense of optimism about the future, a sense that the region had begun to move on from its very high dependence on lower-skill manufacturing, and toward technology industry and higher-skill manufacturing. This sentiment was counterbalanced somewhat by those in Mississauga, who expressed significant anxiety about the state of the economy.

In Quebec, attitudes about the medium term were quite favourable. Most felt that the Quebec economy had been and would continue to be more insulated from the forces of the global economy than the rest of Canada. There were very strong concerns raised about the state of the provinces' finances and health care system, and the risks that both of those issues posed for the future of Canada's economy.

Participants expressed much feedback about future challenges for the Canadian economy. The most important of these were:

- The deterioration of the US economy, and the possibility that it may never recover. Most recognize how dependent Canada is on the US, and express concern that if Canada is too focused on the US, in the long run the country's economic health will deteriorate. This is by far the single most significant concern Canadians have about the future of the economy.
- Diversification of trade relationships. There was a very strong push in several groups, particularly the Vancouver groups but also in Ontario, for governments to diversify trade relationships. In addition to being more aggressive in promoting trade relationships with countries in Asia, there was support for continuing efforts to deepen trade ties with countries like Brazil.
- A major challenge raised across the country was improving at harnessing the economic benefits that can accrue from Canada's immigrant population. There was a prevailing belief raised in several groups that Canada is not well organized to absorb and harness the benefit that the country could get from its immigrant population. Underemployment and underutilization of skills were frequently mentioned in groups as problems that not only held the economy back, but also act as a drag on society as a whole because the costs of immigration end up being greater than they need to be.

- Providing people in economic transition, and young people with lower educational abilities with the skills they need to be effective participants in the economy. Participants in all regions of the country strongly expressed a view that the education system still does not do enough to prepare young people for the workplace, that only a handful of educational institutions (trade and technical schools) truly have their hands on the pulse of the need set and offer the kinds of training that is necessary.
- Maintaining a sustainable health care system. Many participants, particularly in lower income groups, drew connections between public health and economic health, and expressed fear that a health system in decline will have deleterious impacts on the economy.
- The Deficit. Some participants made mention of the deficit as a growing and serious challenge that has the potential to seriously impede Canada's progress in future.

Stimulus Spending

There was a high degree of familiarity with federal government initiatives to help facilitate economic growth through the recessionary period. Many were as quick to cite tax incentives like the credit for children's sporting activities or the tax free savings account as infrastructure spending. With some caveats, there was a recognition that the stimulus spending had helped mitigate the downside of the recession.

When asked whether stimulus spending ought to be turned down and spending go back to pre-recession levels, opinion was fairly widely divided. In the groups across Ontario the prevailing view was that there should continue to be some form of stimulus spending. In the groups across the west, opinion was more mixed, but a majority were of a mind to believe that stimulus spending ought to be eased. Some felt the enhanced infrastructure spending was required, and therefore should continue, while others felt that the tax credits were a good incentive for Canadians to continue spending, even when they may have an instinct to save, given the precarious nature of the U.S. economy. The reasons for continued stimulus spending tended to be more about addressing continuing needs than helping to manage the recession.

In the end, many participants preferred that some form of stimulus spending continue, and that the federal government should make efforts to reduce this spending gradually, and not to eliminate it right away, or all at once. At the very least, participants signaled that the government should allow spending already allocated to run its course, even if that spending goes beyond the March 2011 deadline.

The Deficit

Virtually everyone in the groups knew that the federal government is in a deficit. There were very few that had a sense of the size or impact of the deficit. Some participants expressed a point of view that Canada's deficit was not as large or as significant as the deficits that faced other countries, and by inference, that the deficit was only of modest concern. A handful of others expressed a more disconcerting view of the deficit, expressing significant concern about its size, citing the fact that the deficit is now larger than it was in 1995 when the government of the time took aggressive measures to tackle it.

While this fact (when raised) was of some concern, the prevailing view was that the current deficit situation is not as grave as that of the mid-90s, because of the current state of interest rates, and because other countries' situations are far worse, meaning that there would likely be a lot more pressure placed on other countries to get their deficits down than Canada.

While few like the idea of a deficit, most characterized the current deficit as something that was manageable and appropriate given the circumstances facing the economy. There was minimal appetite for an aggressive approach to the deficit at this point in time. The rationale that was most clearly expressed was that in order to reduce the deficit more aggressively it might have a constricting effect on the still recovering economy, and would inevitably yield widespread cuts to programs and services like Health Care.

When asked specifically about how the federal government ought to tackle the deficit, most were reluctant to offer a view, other than by "reducing waste". There was no appetite to make cuts to social programs or health care. Participants did not feel that government spending was out of control however there were nonetheless concerns with general fiscal responsibility and perceptions of waste (commissions were high on the list of money-wasters, as were the new military planes and our troops in Afghanistan).

In Quebec, possibly more than any other part of Canada, there was a more widely expressed view that the federal government ought to be aggressively focused on eliminating the deficit. In part, this view was fueled by less of a sense that there will be significant drawbacks for individual Quebecers if more of an aggressive approach were taken. Unlike other Canadians who typically feared cuts to social programs and services (or downloading that would lead to such cuts) under an aggressive fighting scenario, participants in the Montreal groups tended to believe that elimination of waste and inefficiency could achieve the deficit-cutting goals.

Role of Government Of Canada

When asked about the role of the federal government in assisting the economy, most wanted the government to lay the groundwork for future growth, rather than focus on economic recovery. This framework would address budgetary matters (tackling the deficit and the debt), economic heterogeneity (increased secondary and tertiary manufacturing; decreased raw material exporting), inter-provincial trade barriers (lessening/removing these barriers), and international trade relationships (more international trade partners; less of a reliance on the US)..

Additionally, participants volunteered that Canada's refugee and immigration system needs to ensure that both Canadian-born and naturalized citizens benefit economically from our process of identifying, attracting, and integrating new Canadians.

The only other role for the federal government that was articulated in some groups was a belief that it could do more to harness and spur green technology and green energy resources in Canada. Individuals in a few of the groups touched on this as a potential area where the federal government could play a constructive role in the near to medium term.

Appendix A – Recruitment Screeners

Recruitment Screener Government of Canada Summer 2010

Group _____	Questionnaire # _____	Date of Last _____	# of previous groups _____
North Vancouver Monday, September 13, 2010 Group 1: Low/Middle HHI @ 5:30 pm \$75 Group 2: High HHI @ 7:30 pm \$75			Recruit: 12 for 8 to 10 show per group Honorarium: \$75 Study#: ### <u>Definitions:</u> Low/Middle income: If single HH income is <\$75K or if multiple HH income is <\$100K High income: If single HH income is \$75K+ or if multiple HH income is \$100K+
Winnipeg Tuesday, September 14, 2010 Group 3: Low/Middle HHI @ 5:30 pm \$75 Group 4: High HHI @ 7:30 pm \$75			
Kitchener Wednesday, September 15, 2010 Group 5: Low/Middle HHI @ 5:30 pm \$75 Group 6: High HHI @ 7:30 pm \$75			
Montreal (French) Wednesday, September 15, 2010 Group 7: Low/Middle HHI @ 3:00 pm \$75 Group 8: High HHI @ 5:00 pm \$75			
Mississauga Thursday, September 16, 2010 Group 9: Low/Middle HHI @ 5:30 pm \$75 Group 10: High HHI @ 7:30 pm \$75			

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 (<i>circle</i>): panel random client referral	On Quotas: _____

Hello, my name is _____. I'm calling from Walker Consulting, 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 nine 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. 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 **ASK IF ANYONE ELSE IN THE HOUSEHOLD MIGHT BE INTERESTED**

IF NOT 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.

READ TO ALL: "This call may be monitored or audio taped for quality control and evaluation purposes."

ADDITIONAL CLARIFICATION IF NEEDED:

- to ensure that I (the interviewer) am reading the questions correctly and collecting your answers accurately;
- to assess my (the interviewer) work for performance evaluation;
- to ensure that the questionnaire is accurate/correct (i.e. evaluation of CATI programming and methodology – we're asking the right questions to meet our clients' research requirements – kind of like pre-testing).
- If the call is audio taped, it is only for the purposes of playback to the interviewer for a performance evaluation immediately after the interview is conducted or it can be used by the Project Manager/client to evaluate the questionnaire if they were unavailable at the time of the interview – all audio tapes are destroyed after the evaluation.

S1) Do you or any member of your household work...

	Yes	No
For a marketing research firm	1	2
For a magazine or newspaper	1	2
For a radio or television station	1	2
For a public relations company	1	2
For the government, whether federal or provincial	1	2
For an advertising agency or graphic design firm	1	2

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

S2) Are you at least 18 years old?

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

S3) Are you the head or co-head of your household?

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

S4) 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**

S5) How long ago was it? _____

TERMINATE IF IN THE PAST 6 MONTHS

S6) How many consumer discussion groups have you attended in the past 5 years?

TERMINATE IF MORE THAN 4 DISCUSSION GROUPS

S7) How long have you lived in [CITY]?

TERMINATE IF LESS THAN 2 YEARS

ASK ALL

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

Under 18	0	}	THANK AND TERMINATE
18-24 years	1		
25-34 years	2		
35-44 years	3		
45-54 years	4	}	ENSURE GOOD MIX PER GROUP
55-64 years	5		
65+ years	6		
Refuse	9		

Q2) What is your current employment status?

Working full-time	1
Working part-time	2
Self-employed	3
Retired	4
Unemployed	5
Student	6
Other	7
DK/RF	99

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

One
More than one

1 /
2 SKIP

Q4a) **[IF Q3=1 ASK]** Was your household's income for 2009 greater or less than 75 thousand dollars?

\$75K or greater	1	Qualifies for group 2 UNLESS EMPLOYMENT STATUS = STUDENT
Less than \$75K	2	Qualifies for group 1
Refused	9	THANK AND TERMINATE

Q4b) **[IF Q3=2 ASK]** Was your household's income for 2009 greater or less than 100 thousand dollars?

\$100K or greater	1	Qualifies for group 2 UNLESS EMPLOYMENT STATUS = STUDENT
Less than \$100K	2	Qualifies for group 1
Refused	9	THANK AND TERMINATE

Q5) Could you please tell me what is the last level of education that you have completed?

**ENSURE
GOOD
MIX PER
GROUP**

Some high school only	1	} 1
Completed high school	2	
Some College/University	3	
Completed College/University	4	
RF/DK	9	

Q6) DO NOT ASK – NOTE GENDER

Male	1	} ENSURE 50-50 SPLIT
Female	2	

Invitation

Q7) Great, you qualify for one of our focus group sessions. Would you be available to attend a focus group on **(DATE @ TIME)**? It will last approximately 2 hours.

Yes	1	CONTINUE
No	2	THANK AND TERMINATE
DK (do not read)	3	ARRANGE CALLBACK

Q8) Participants in group discussions are asked to voice their opinions and thoughts, how comfortable are you in voicing your opinions in front of others **(IF APPROPRIATE: In English/French)**? Are you (read list)

Very comfortable	1	MINIMUM 4 PER GROUP
Fairly comfortable	2	
Comfortable	3	
Not very comfortable	4	THANK AND TERMINATE
Very uncomfortable	5	THANK AND TERMINATE

As I mentioned earlier, the group discussion will take place the evening of, **DATE @ TIME for 2 hours** and participants will receive **\$75** for their time. Would you be willing to attend?

Yes

1

CONTINUE

No

2

THANK AND TERMINATE

North Vancouver

Monday, September 13, 2010

Group 1: Low/Middle HHI	@ 5:30 pm	\$75
Group 2: High HHI	@ 7:30 pm	\$75

Winnipeg

Tuesday, September 14, 2010

Group 3: Low/Middle HHI	@ 5:30 pm	\$75
Group 4: High HHI	@ 7:30 pm	\$75

Kitchener

Wednesday, September 15, 2010

Group 5: Low/Middle HHI	@ 5:30 pm	\$75
Group 6: High HHI	@ 7:30 pm	\$75

Montreal (French)

Wednesday, September 15, 2010

Group 7: Low/Middle HHI	@ 3:00 pm	\$75
Group 8: High HHI	@ 5:00 pm	\$75

Mississauga

Thursday, September 16, 2010

Group 9: Low/Middle HHI	@ 5:30 pm	\$75
Group 10: High HHI	@ 7:30 pm	\$75

Privacy Questions

Now I have a few questions that relate to privacy, your personal information and the research process. We will need your consent on a few issues that enable us to conduct our research. As I run through these questions, please feel free to ask me any questions you would like clarified.

P1) First, we will be providing the hosting facility and session moderator with a list of respondents' names and profiles (screener responses) so that they can sign you into the group. Do we have your permission to do this? I assure you it will be kept strictly confidential.

Yes	1	GO TO P2
No	2	READ RESPONDENT INFO BELOW

Unfortunately we need to provide the facility hosting the session and the moderator with the names and background of the people attending the focus group because only the individuals invited are allowed in the session and the facility and moderator must have this information for verification purposes. Please be assured that this information will be kept strictly confidential. **GO TO P1A**

P1a) Now that I've explained this, do I have your permission to provide your name and profile to the facility?

Yes	1	GO TO P2
No	2	THANK & TERMINATE

P2) An audio and/or video tape of the group session will be produced for research purposes. The tapes will be used only by the research professional to assist in preparing a report on the research findings and will be destroyed once the report is completed.

Do you agree to be audio and/or video taped for research purposes only?

Yes	1	THANK & GO TO P3
No	2	READ RESPONDENT INFO BELOW

Unfortunately it is necessary for the research process for us to audio/video tape the session as the researcher needs this material to complete the report. I assure you it is kept strictly confidential and it will be destroyed as when the research is complete. **GO TO P2A**

P2a) Now that I've explained this, do I have your permission for audio/video taping?

Yes	1	THANK & GO TO P3
No	2	THANK AND TERMINATE

P3) Each month FocusSearch submits the names of individuals that have participated in our focus groups to the Marketing Research and Intelligence Association Qualitative Central system (www.mria-arim.ca). Qualitative Central serves as a centralized database to review participation in qualitative research and focus groups. You will not be contacted for any reason whatsoever as a result of being on this list.

Do we have your permission to submit your name and phone number to MRIA's Qualitative Central system?

Yes	1	THANK & GO TO INVITATION
No	2	GO TO P3A

P3a) Unfortunately, to participate in this focus group we must have your permission to add your name to the Qualitative Central system as it is the only way for us to ensure the integrity of the research process and track participation in qualitative research. The system is maintained by the industry body, the Professional Marketing Research Society, and is solely used to track your participation in qualitative research (such as focus groups). You will not be contacted for any reason whatsoever as a result of being on this list.

Now that I've explained this do I have your permission to add your name to our qualitative central list?

Yes	1	THANK & GO TO INVITATION
No	2	THANK & TERMINATE

AS REQUIRED, ADDITIONAL INFO FOR THE INTERVIEWER:

Please be assured that this information is kept confidential and is strictly accessed and used by professional market research firm to review participation and prevent “professional respondents” from attending sessions. Research firms participating in MRIA’s Qualitative Central require your consent to be eligible to participate in the focus group - the system helps ensure the integrity of the research process.

AS REQUIRED, NOTE ABOUT MRIA:

The Marketing Research and Intelligence Association is a non-profit organization for marketing research professionals engaged in marketing, advertising, social, and political research. The Society’s mission is to be the leader in promoting excellence in the practice of marketing and social research and in the value of market information.

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: (**ADDRESSES TO BE CONFIRMED**)

<p>North Vancouver</p> <p>Synovate Central 1090 West Georgia Street, Suite 1550</p> <p>Entry Instructions to Building: Entrance is from West Georgia Street.</p> <p>Directions: Nearest intersection: Thurlow and West Georgia.</p> <p>Parking: Street parking</p>	<p>Kitchener</p> <p>Metroline Research Group Inc. 7 Duke Street West, Suite 301</p> <p>Entry Instructions to Building: Use intercom located to the right of main entry doors after 6pm.</p> <p>Directions: Corner of Duke & Queen Streets in downtown Kitchener.</p> <p>Parking: Municipal and Street parking</p>
<p>Winnipeg</p> <p>NRG Research Group 804 – 213 Notre</p> <p>Entry Instructions to Building: Enter from Notre Dame. Facility is located on the 8th floor. If the doors are locked when you arrive, please use the keypad next to the door to be buzzed into the building. The code is 8060. This is posted next to the door.</p> <p>Directions: NRG Research is located near the corner of Portage and Main on Notre Dame. Located in the Electric Railway Chambers Building. There is a Subway Restaurant directly across the street from our building.</p> <p>Parking: There is parking in the parkade on Albert Street and there is also some street parking available. There is a walkway from the third level of the parkade to 213 Notre Dame. The Focus Group Studio is located in Suite #804 on the eighth floor.</p>	<p>Montreal</p> <p>Opinion Search 1080 Côte du Beaver Hall, 4th Floor</p> <p>Entry Instructions to Building: When entering the building, please take the elevator to the fourth floor. If coming by the Square Victoria metro, Please take the Beaver Hall exit. Direct access from the Metro in the building until 6:00 pm.</p> <p>Directions: 3 blocks down St Catherine, Intersection: Belmont and Beaver Hall. Metro: Square Victoria</p> <p>Parking: Street, attached, and municipal parking</p>

Mississauga

ACCE

2575B Dunwin Drive

Entry Instructions to Building:

From Woodchester Dr. enter the 2nd driveway on right side, drive to side of building, ACCE entrance is there.

Directions:

Nearest intersection: Winston Churchill and Dundas St. West. East on Dundas to Woodchester, left on Woodchester to Dunwin, left on Dunwin.

Parking:

Attached parking

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 **[1-800 NUMBER]** at our office. Please ask for **[NAME]**. Someone will 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 WE HAVE 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.

Questionnaire de recrutement Projet n° CD10919

Questionnaire n° _____
groupe _____

Date du dernier

Nombre de groupes
antérieurs _____

<p>Montreal (French) Wednesday, September 15, 2010</p> <p>Group 7: Low/Middle HHI @ 3:00 pm \$75</p> <p>Group 8: High HHI @ 5:00 pm \$75</p>	<p>Recrutez 12 personnes par groupe pour que 8 à 10 d'entre elles se présentent</p> <p>Prime : 75 \$</p> <p>Étude n° 91109</p> <p>Code d'interurbain : xxx</p> <p>Définitions :</p> <p>Revenu bas/moyen :</p> <p>Si un seul adulte dans le ménage : revenu <75 000 \$. Si plusieurs adultes dans le ménage : revenu <100 000 \$</p> <p>Revenu élevé :</p> <p>Si un seul adulte dans le ménage : revenu supérieur ou égal à 75 000 \$. Si plusieurs adultes dans le ménage : revenu supérieur ou égal à 100 000 \$</p>
---	---

Nom du répondant : _____	Intervieweur : _____
N° de téléphone du répondant : _____ (maison)	Date : _____
N° de téléphone du répondant : _____ (travail)	Validé : _____
N° de télécopieur du répondant : _____ envoyé? ou	Fichiers centraux : _____
Courriel du répondant : _____ envoyé?	Listes : _____
Source de l'échantillon (<i>encerclez</i>) : eVox aléatoire client référence	Quotas : _____

Bonjour, je m'appelle _____ et je vous téléphone du Walker Consulting, une firme nationale de recherche sur l'opinion publique. Nous organisons des groupes de discussion pour le compte du gouvernement du Canada afin d'examiner divers enjeux.

EXPLIQUEZ LES GROUPES DE DISCUSSION. Environ neuf personnes, toutes sélectionnées au hasard comme vous, prendront part à la discussion. En guise de remerciement pour leur temps, les participants recevront une prime de 75 \$. Toutefois, avant de vous inviter à vous joindre à nous, j'aimerais vous poser quelques questions pour m'assurer de la diversité des participants. Puis-je vous poser quelques questions?

Oui **CONTINUEZ**
Non **DEMANDEZ SI UNE AUTRE PERSONNE DU MÉNAGE POURRAIT ÊTRE INTÉRESSÉE**

SI NON, REMERCIEZ ET TERMINEZ

Votre participation est volontaire. Seule votre opinion compte pour nous. Nous ne tenterons pas de vous vendre quoi que ce soit ou de vous faire changer d'avis. La discussion se déroulera sous forme de table ronde et sera animée par un professionnel de la recherche.

LISEZ À TOUS : « Cet appel peut être écouté ou enregistré à des fins d'évaluation ou de contrôle de la qualité. »

CLARIFICATIONS SUPPLÉMENTAIRES AU BESOIN :

- Pour s'assurer que je lise les questions correctement et que je recueille vos réponses avec précision;
- Pour évaluer mon rendement;
- Pour vérifier que le questionnaire est exact/correct (c.-à-d. évaluation de la programmation ITAO et de la méthodologie – s'assurer que nous posons les bonnes questions pour répondre aux exigences de nos clients en matière de recherche – comme un prétest);
- Si l'appel est enregistré, l'enregistrement sert uniquement à évaluer le travail de l'intervieweur et est écouté immédiatement après la fin de l'entrevue. S'ils étaient absents au moment de l'entrevue, le client et le gestionnaire de projet pourraient également écouter l'enregistrement.

S1) Est-ce que vous, ou quelqu'un d'autre de votre ménage, travaillez pour...?

Une firme de recherche marketing
1

Un magazine ou un journal
2

Une station de radio ou une chaîne de télévision
3

Une firme de relations publiques
4

Le gouvernement fédéral ou provincial
6

SI « OUI » À L'UNE DE CES OPTIONS, REMERCIEZ ET TERMINEZ

S2) Avez-vous au moins 18 ans?

Oui	1	CONTINUEZ
Non	2	REMERCIEZ ET TERMINEZ

S3) Êtes-vous le chef ou l'un des chefs de votre ménage?

Oui	1	CONTINUEZ
Non	2	REMERCIEZ ET TERMINEZ

S4) Avez-vous déjà participé à un groupe de discussion de consommateurs, à une entrevue ou à un sondage pour lequel vous avez été recruté(e) à l'avance et avez reçu une somme d'argent?

Oui	1	MAXIMUM ½ PAR GROUPE
Non	2	PASSEZ À Q1

S5) Il y a combien de temps? _____

TERMINEZ SI AU COURS DES 6 DERNIERS MOIS

POSEZ À TOUS

Q1) Pourriez-vous me dire auquel des groupes d'âge suivants vous appartenez? Avez-vous...?

Moins de 18 ans	0	}	REMERCIEZ ET TERMINEZ
18 à 24 ans	1		
25 à 34 ans	2	}	BONNE DIVERSITÉ
35 à 44 ans	3		
45 à 54 ans	4	}	
55 à 64 ans	5		
65 ans et plus	6		
Refuse	9		

Q2) Quelle est votre situation d'emploi actuelle?

Travailleur(euse) à temps plein	1
Travailleur(euse) à temps partiel	2
Travailleur(euse) autonome	3
Retraité(e)	4
Sans emploi	5
Étudiant(e)	6
Autre	7
NSP/Refuse	99

Q3) Combien de personnes de plus de 18 ans vivent dans votre ménage?

Une
Plus d'une

1 **PO**
2 **PASSE**

Q4a) **[SI Q3=1 POSEZ]** En 2009, le revenu de votre ménage a-t-il été supérieur ou inférieur à 75 000 \$?

75 000 \$ ou plus	1	Admissible au 2^e groupe SAUF SI LA SITUATION D'EMPLOI = ÉTUDIANT(E) Admissible au 1^{er} groupe
Inférieur à 75 000 \$	2	

Refuse 9 **REMERCIEZ ET**
TERMINEZ

Q4b) **[SI Q3=2 POSEZ]** En 2009, le revenu de votre ménage a-t-il été supérieur ou inférieur à 100 000 \$?

100 000 \$ ou plus	1	Admissible au 2^e groupe SAUF SI LA SITUATION D'EMPLOI = ÉTUDIANT(E)
Inférieur à 100 000 \$	2	Admissible au 1^{er} groupe
Refuse	9	REMERCIEZ ET

TERMINEZ

Q5) Quel est le plus haut niveau de scolarité que vous avez atteint?

Études secondaires non terminées	1	} BONNE DIVERSITÉ DANS CHAQUE GROUPE
Études secondaires terminées	2	
Études collégiales/universitaires non terminées	3	
Études collégiales/universitaires terminées	4	
NSP/Refuse	9	

Q6) **NE DEMANDEZ PAS – INDIQUEZ LE SEXE**

Homme	1	} RÉPARTITION 50-50
Femme	2	

Invitation

Q7) Excellent, vous êtes admissible pour participer à l'un de nos groupes de discussion. Seriez-vous disponible pour participer à un groupe de discussion le **(DATE À HEURE)**? Il durera environ 2 heures.

Oui	1	CONTINUEZ
Non	2	REMERCIEZ ET TERMINEZ
NSP (ne lisez pas)	3	FIXEZ UN RENDEZ-VOUS

Q8) Nous demandons aux participants des groupes de discussion d'exprimer leurs opinions et de verbaliser leurs pensées. Dans quelle mesure êtes-vous à l'aise d'exprimer votre opinion **(SI APPROPRIÉ : en anglais/en français)** devant d'autres personnes? Êtes-vous...? (lisez la liste)

Très à l'aise	1	MINIMUM 4 PAR GROUPE
Assez à l'aise	2	
À l'aise	3	
Pas très à l'aise	4	REMERCIEZ ET TERMINEZ
Très mal à l'aise	5	REMERCIEZ ET TERMINEZ

Comme je vous l'ai mentionné plus tôt, le groupe de discussion aura lieu le **DATE À HEURE et durera 2 heures**. Les participants recevront une prime de **75 \$** en guise de remerciement pour le temps qu'ils nous auront consacré. Accepteriez-vous d'y participer?

Oui	1	CONTINUEZ
Non	2	REMERCIEZ ET TERMINEZ

North Vancouver

Monday, September 13, 2010

Group 1: Low/Middle HHI @ 5:30 pm \$75

Group 2: High HHI @ 7:30 pm \$75

Winnipeg

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Wednesday, September 15, 2010

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Montreal (French)

Wednesday, September 15, 2010

Group 7: Low/Middle HHI @ 3:00 pm \$75

Group 8: High HHI @ 5:00 pm \$75

Mississauga

Thursday, September 16, 2010

Group 9: Low/Middle HHI @ 5:30 pm \$75

Group 10: High HHI @ 7:30 pm \$75

Enjeux relatifs à la confidentialité

J'aurais maintenant quelques questions à vous poser à propos de la confidentialité, de vos renseignements personnels et du déroulement de la recherche. Nous devons obtenir votre permission par rapport à certains sujets pour pouvoir effectuer notre recherche. Lorsque je vous poserai ces questions, n'hésitez pas à me demander de les clarifier si vous en ressentez le besoin.

P1) Tout d'abord, nous fournirons une liste des noms et des profils (réponses au questionnaire) des participants aux hôtes et au modérateur, afin qu'ils puissent vous inscrire. Acceptez-vous que nous leur transmettions ces renseignements? Je peux vous assurer que ceux-ci demeureront strictement confidentiels

Oui	1	PASSEZ À P2
Non	2	LISEZ L'INFORMATION SUIVANTE AU RÉPONDANT

Malheureusement, nous devons donner votre nom et votre profil aux hôtes et au modérateur du groupe de discussion, puisque seuls les gens qui sont invités à participer peuvent prendre part à la séance. Les hôtes et le modérateur ont besoin de ces renseignements à des fins de vérification uniquement. Soyez assuré(e) que ces renseignements demeureront strictement confidentiels. **PASSEZ À P1A**

P1a) Maintenant que je vous ai expliqué cela, acceptez-vous que nous transmettions votre nom et votre profil aux hôtes et au modérateur du groupe de discussion?

Oui	1	PASSEZ À P2
Non	2	REMERCIEZ ET TERMINEZ

P2) Il y aura un enregistrement audiovisuel de la séance et celui-ci servira uniquement à des fins de recherche. L'enregistrement sera uniquement utilisé par un professionnel de la recherche pour préparer le rapport sur les résultats de la recherche. L'enregistrement sera détruit lorsque le rapport sera terminé.

Acceptez-vous qu'un enregistrement audiovisuel de la séance soit effectué uniquement à des fins de recherche?

Oui	1	REMERCIEZ ET PASSEZ À P3
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Non 2 **LISEZ L'INFORMATION SUIVANTE AU RÉPONDANT**

Malheureusement, nous devons faire un enregistrement audiovisuel de la séance puisque le professionnel de la recherche a besoin de ce matériel pour rédiger son rapport. Je peux vous assurer que cet enregistrement demeurera strictement confidentiel et qu'il sera détruit dès que le rapport sera terminé. **PASSEZ À P2A**

P2a) Maintenant que je vous ai expliqué cela, acceptez-vous que nous fassions un enregistrement audiovisuel de la séance?

Oui 1 **REMERCIEZ ET PASSEZ À P3**
 Non 2 **REMERCIEZ ET TERMINEZ**

P3) Chaque mois, nous soumettons le nom des personnes qui ont participé à nos séances au Registre central de recherche qualitative de l'Association de la recherche et de l'intelligence marketing (www.mria-arim.ca). Le Registre central de recherche qualitative est une base de données centrale qui vérifie la participation aux entrevues de recherches qualitatives. Personne ne communiquera avec vous parce que votre nom se trouve sur cette liste.

Nous permettez-vous de soumettre votre nom et votre numéro de téléphone au Registre central de recherche qualitative de l'ARIM?

Oui 1 **REMERCIEZ ET PASSEZ À L'INVITATION**
 Non 2 **PASSEZ À P3A**

P3a) Malheureusement, pour que vous puissiez participer à cette séance, nous devons avoir votre permission pour ajouter votre nom au Registre central de recherche qualitative puisqu'il s'agit du seul moyen qui nous permet d'assurer l'intégrité du processus de recherche et de faire le suivi de la participation aux recherches qualitatives. Le système est tenu à jour par l'Association de la recherche et de l'intelligence marketing et il est uniquement utilisé pour faire le suivi de votre participation aux recherches qualitatives (comme les groupes de discussion). Personne ne communiquera avec vous parce que votre nom se trouve sur cette liste.

Maintenant que je vous ai expliqué cela, acceptez-vous que nous ajoutions votre nom au Registre central de recherche qualitative?

Oui 1 **REMERCIEZ ET PASSEZ À L'INVITATION**

Non

2

REMERCIEZ ET TERMINEZ

**AU BESOIN, RENSEIGNEMENTS SUPPLÉMENTAIRES POUR
L'INTERVIEWEUR :**

Soyez assuré(e) que cette information demeurera confidentielle et seules les firmes de recherche marketing professionnelles pourront y accéder et l'utiliser pour vérifier la participation et empêcher les « répondants professionnels » de participer aux séances. Les firmes de recherche qui participent au Registre central de recherche qualitative de l'ARIM ont besoin de votre autorisation avant que vous ne soyez admissible à participer au groupe. Cette procédure contribue à assurer l'intégrité du processus de recherche.

AU BESOIN, NOTE À PROPOS DE L'ARIM :

L'Association de la recherche et de l'intelligence marketing est un organisme à but non lucratif qui regroupe des professionnels de la recherche marketing impliqués dans le marketing, la publicité, les recherches sociales et politiques. La mission de l'Association est d'être le leader dans la promotion de l'excellence dans la pratique du marketing et des recherches sociales ainsi que dans la valeur de l'information sur les marchés.

Invitation :

Avez-vous un crayon à portée de la main pour prendre en note l'adresse de l'endroit où se tiendra le groupe? Il aura lieu à : (AJOUTEZ LES ADRESSES)

Montreal

Opinion Search

1080 Côte du Beaver Hall, 4th Floor

Entry Instructions to Building:
When entering the building, please take the elevator to the fourth floor
If coming buy the Square Victoria metro, Please take the Beaver Hall exit. Direct
access from the Metro in the building until 6:00 pm.

Directions:
3 blocks down St Catherine,
Intersection: Belmont and Beaver Hall.
Metro: Square Victoria

Parking: Street, attached, and municipal parking

Nous vous demandons d'arriver quinze minutes avant l'heure prévue pour vous permettre de stationner votre voiture, de trouver l'endroit et de vous présenter à nos hôtes. Il est possible qu'on vous demande de vous identifier avant la tenue de la séance. Par conséquent, assurez-vous d'avoir une pièce d'identité (par exemple, un permis de conduire) sur vous. De plus, si vous avez besoin de lunettes pour lire, veuillez les apporter.

Comme nous n'invitons qu'un petit nombre de personnes, votre participation est très importante pour nous. Si, pour une raison ou une autre vous ne pouvez pas vous présenter, veuillez nous en aviser pour que nous puissions vous remplacer. Vous pouvez nous joindre au **1 800 363-4229, poste 5068**. Demandez à parler à **Louise Tremblay**. Quelqu'un communiquera avec vous la veille du groupe de discussion pour confirmer votre présence.

Afin que nous puissions vous appeler pour confirmer votre présence ou pour vous informer si des changements survenaient, pourriez-vous me confirmer votre nom et vos coordonnées? **[LISEZ LES COORDONNÉES QUE NOUS AVONS ET MODIFIEZ-LES AU BESOIN.]**

Prénom _____

Nom de famille _____

Courriel _____

Nº de téléphone le jour _____

Nº de téléphone le soir _____

Si le répondant refuse de donner son prénom, son nom ou son numéro de téléphone, dites-lui que ces renseignements demeureront strictement confidentiels en vertu de la loi sur le respect de la vie privée et que ceux-ci seront uniquement utilisés pour le contacter afin de confirmer sa présence et pour l'informer de tout changement concernant le groupe de discussion. S'il refuse toujours, REMERCIEZ ET TERMINEZ.

Appendix B – Moderator’s Guides

MODERATOR’S GUIDE

September, 2010

INTRODUCTION (5 Minutes)

Explain to participants:

- The role of moderator is to ask questions, timekeeper, objective/no special interest
- The length of the session (2 hours)
- Taping of the discussion, one-way mirror and colleagues viewing in back room
- Results are confidential and reported all together/individuals are not identified/participation is voluntary
- Role of participants: not expected to be experts, no need to agree with each other, speak openly and frankly about opinions and remember that there are no wrong answers
- Get participants to introduce themselves and their occupation/hobbies etc...

WARM UP: General Context (10 Minutes)

- Thinking of the issues facing Canada today, which one would you say the Government of Canada should focus on most?
- What makes you say that?
- *Probe to uncover perceptions associated with any dimension of these issues that touch on the economy*

ECONOMIC SITUATION (40 Minutes)

[ASSUMING THEY HAVE MENTIONED THE ECONOMY:] Many of you mentioned the economy as an area the Government of Canada should focus on.

- Word association: What words best describe the current state of Canada's economy? (Hand-Out)
- The local economy here in X?
- Overall, how is Canada's economy doing? What makes you say that?
- What are the things that you rely on to form your opinion of how the economy is doing? Why that one/those ones? If necessary: What does that particular aspect tell you?
- What do you feel is going well? What do you feel is not going well?
- What have you seen or heard in your own life that suggests the economy is good or bad?
- How do you think things will be one year from now? What about 5 years from now?
- Is Canada's national economic situation different from the economic situation in this province? What is different? What makes you say that?
- What do you think the Government should be doing about the economy? [RECORD ANSWERS ON FLIP CHART]
- What are the biggest threats to or concerns you have about Canada's economy? PROBE IF NECESSARY:
 - Volatile financial markets
 - Slower than expected recovery
 - High dollar
 - Job loss to other parts of the world
 - Housing prices in Canada
 - Consumer confidence
 - Tightening credit markets
 - Pensions
 - Interest rates

- Where do you think Canada's economy is headed? Are you optimistic about the future? What makes you say that?
- What internal factors will most affect our economic future?
- What external factors will most affect our economic future?
- What will happen to you/your family/people you know if interest rates were to rise 2 points over the next year?

GOVERNMENT ACTION ON THE ECONOMY [40 Minutes]

- Have you seen or heard of any specific actions or steps taken to help Canada's economy? [RECORD ON FLIP CHART]

- What additional steps do you think the Government should take to ensure that the Canadian economy remains internationally competitive and continues to attract investment and create jobs?

- Have you heard anything about whether the Government of Canada is in a deficit or surplus situation when it comes to its budget?
 - In fact, the Government is in a deficit situation. How do you feel about that fact? How comfortable are you with it? (PROBE: Is it a good/bad thing? Is, or was, it necessary/unnecessary?)
 - How important is it for the Government to get out of deficit? What kind of timeframe do you think makes the most sense?
 - What are the benefits of getting out of a deficit as soon as possible? Are there any drawbacks to taking this approach? What are they? How would this kind of approach affect you directly?
 - How do you think the Government should get out of deficit? Reduce spending? Increase taxes? Wait for economy to grow and tax revenues to increase as a result?

COMMUNICATIONS [20 Minutes]

- What types of actions could the Government do to make you feel comfortable with its handling of the economy and deficit? Why would this make you more comfortable?

CONCLUSION [5 Minutes]

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, I wanted to ask you whether you have any last thoughts that you want to give the Government of Canada.

GUIDE DE DISCUSSION SEPTEMBRE 2010

INTRODUCTION (5 minutes)

À expliquer aux participants :

- Le rôle du modérateur est de poser des questions et de vérifier le temps consacré à chaque discussion. Le modérateur est objectif et ne détient aucun intérêt dans le sujet de la discussion.
- La durée de la séance : 2 heures.
- La discussion fait l'objet d'un enregistrement et il y a un miroir d'observation derrière lequel se trouvent des collègues.
- Les résultats sont confidentiels et ils seront présentés sous forme agrégée/ Les participants ne seront pas identifiés/ Votre participation est volontaire.
- Rôle des participants : on ne s'attend pas à ce que vous soyez des experts, vous ne devez pas nécessairement être d'accord avec les autres participants, nous vous demandons d'exprimer vos opinions ouvertement et honnêtement et rappelez-vous qu'il n'y a pas de mauvaises réponses.
- Demandez aux participants de se présenter et de dire quelle est leur occupation/quels sont leurs passe-temps, etc.

MISE EN TRAIN : Contexte général (10 minutes)

- Si vous songez aux enjeux auxquels le Canada est actuellement confronté, à votre avis, sur quel enjeu le gouvernement du Canada devrait-il le plus axer ses efforts?
- Qu'est-ce qui vous fait dire cela?
 - *Sondez pour connaître les perceptions à l'égard des facettes de ces enjeux qui touchent l'économie*

OTTAWA

160, rue Elgin
Ottawa (Ontario)
K2P 2P7 Canada
tél. : 613-238-1234
télé. : 613-238-1234

TORONTO

2345, rue York
Toronto (Ontario)
M4P 2E5 Canada
tél. : 416-961-1234
télé. : 416-961-1234

MONTRÉAL

1080, côte d'Orléans
Montréal (Québec)
H2Z 1S8 Canada
tél. : 514-281-1234

SITUATION ÉCONOMIQUE (40 minutes)

[EN TENANT POUR ACQUIS QU’ILS ONT MENTIONNÉ L’ÉCONOMIE :] Plusieurs d’entre vous ont mentionné que l’économie était un enjeu sur lequel le gouvernement du Canada devrait axer ses efforts.

- **Association de mots** : Quels mots décrivent le mieux l’état actuel de l’économie du Canada? (**Document à distribuer**)
- Maintenant, si vous songez à l’économie locale/régionale ici au Québec, utiliseriez-vous d’autres mots pour la décrire?
- Comment l’économie du Canada se porte-t-elle? Qu’est-ce qui vous fait dire cela?
- À quoi vous fiez-vous pour vous forger une opinion sur l’état de l’économie? Pourquoi vous fiez-vous à cela? Au besoin : Qu’est-ce que cet aspect particulier vous dit à ce sujet?
- Vers où l’économie du Canada se dirige-t-elle, selon vous? Êtes-vous optimiste par rapport à l’avenir? Qu’est-ce qui vous fait dire cela?
- Qu’est-ce qui va bien, selon vous? Qu’est-ce qui ne va pas bien, selon vous?
- Qu’avez-vous vu ou entendu dans votre propre vie qui laisse supposer que l’économie va bien ou va mal?
- Comment les choses iront-elles dans un an, selon vous? Et dans 5 ans?
- Au cours des derniers mois, avez-vous changé votre comportement financier? Qu’avez-vous changé?
- Nous vivons une période d’incertitude et il arrive que des gens perdent leur emploi. Pouvez-vous me décrire ce que le gouvernement devrait faire pour aider ces gens? Et si vous vous retrouviez sans emploi?
- Selon vous, qu’est-ce que le gouvernement devrait faire au sujet de l’économie? [**INSCRIVEZ LES RÉPONSES AU TABLEAU**]
- (**INSCRIVEZ LES RÉPONSES AU TABLEAU**) Quelles sont les plus grandes menaces pour l’économie canadienne et qu’est-ce qui vous inquiète le plus à ce sujet? **SONDEZ AU BESOIN** :
 - La volatilité des marchés financiers
 - La reprise plus lente que prévu
 - La vigueur du dollar
 - Les pertes d’emplois au profit d’autres régions du globe
 - Le prix de l’immobilier au Canada
 - La confiance des consommateurs
 - Le resserrement du marché du crédit
 - Les pensions
 - La hausse des taux d’intérêt
 - La situation économique des États-Unis

- Vers où l'économie du Canada se dirige-t-elle, selon vous? Êtes-vous optimiste par rapport à l'avenir? Qu'est-ce qui vous fait dire cela?
- Quels facteurs internes auront le plus d'impact sur notre avenir économique?
- Quels facteurs externes auront le plus d'impact sur notre avenir économique?
- Que vous arriverait-t-il/Qu'est-ce qui arriverait à votre famille/vos connaissances si les taux d'intérêt augmentaient de 2 points au cours de la prochaine année?

PLAN D'ACTION ÉCONOMIQUE DU GOUVERNEMENT [40 minutes]

- Avez-vous vu ou entendu parler d'actions ou de mesures précises mises de l'avant par le gouvernement pour aider l'économie du Canada?
- Selon vous, quelles mesures supplémentaires le gouvernement devrait-il mettre de l'avant pour s'assurer que l'économie canadienne demeure concurrentielle à l'échelle internationale et pour faire face à certains des défis dont nous avons discuté il y a quelques minutes?
- Avez-vous entendu quoi que ce soit sur le solde budgétaire du gouvernement du Canada, à savoir s'il révèle un déficit ou un excédent?
 - En fait, le solde budgétaire du gouvernement est déficitaire. Comment vous sentez-vous par rapport à ce fait? Dans quelle mesure êtes-vous à l'aise avec la situation? (**SONDEZ** : Est-ce une bonne chose/une mauvaise chose? Est-ce que c'est ou c'était nécessaire/pas nécessaire?)
 - Dans quelle mesure est-ce important pour le gouvernement de sortir du déficit? Selon vous, quelle période de temps serait la plus logique?
 - Quels sont les avantages de sortir du déficit le plus rapidement possible? Cette approche présente-t-elle des désavantages? Lesquels? Comment une telle approche pourrait-elle vous affecter directement?
 - Selon vous, de quelle façon le gouvernement devrait-il se sortir du déficit? En réduisant ses dépenses? En augmentant les impôts? En attendant que la croissance économique entraîne une augmentation des recettes fiscales?

PRINCIPAUX ENJEUX EN ÉMERGENCE [20 minutes]

- Sondez à propos des problèmes de santé/d'immigration (ou d'autres grands enjeux soulevés durant la discussion) et de leurs impacts actuels et futurs sur l'économie.

CONCLUSION [5 minutes]

Nous avons couvert de nombreux sujets ce soir et nous vous sommes très reconnaissants du temps et de l'énergie que vous avez consacré à la discussion d'aujourd'hui. Vos commentaires sont très importants et très enrichissants pour nous!

- En conclusion, je voulais vous demander si vous aviez d'autres idées à proposer au gouvernement du Canada.