



Ipsos Reid



Groupes de discussion sur l'opinion des Canadiens sur l'état de l'économie – Hiver 2011

Faits saillants

Février 2011

Bureau du Conseil privé

This report is also available in English.

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Tous les participants des groupes de discussion sont les chefs ou un des chefs de leurs foyers respectifs. De plus, la composition par groupe de discussion reflétait un mélange de sexes, d'âges et de niveaux de scolarité.

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Faits saillants

Voici les principaux résultats de cette étude :

Enjeux les plus importants

Les préoccupations des participants à l'égard des enjeux auxquels est confronté le pays ont tendance à être partagées, les unes étant axées sur l'aspect social, par exemple le vieillissement de la population du Canada, les soins de santé, la pauvreté, l'immigration et l'environnement (conséquences et durabilité d'une économie qui repose sur les ressources naturelles), et les autres, sur l'aspect économique, par exemple la mondialisation, les pertes d'emploi et les besoins en matière de création d'emploi, l'impôt des particuliers et l'augmentation du coût de la vie, pour en citer quelques-unes.

L'économie canadienne

Les participants ont tendance à exprimer un optimisme prudent lorsqu'il est question des perspectives économiques du Canada, tant à court terme qu'à moyen terme. Pour expliquer leur point de vue, ils comparent souvent notre économie à celle des États-Unis et à celles de certains pays européens. Il ne faut pas croire que les participants ne se préoccupent pas de l'état de l'économie canadienne. En fait, leurs préoccupations sont atténuées par l'impression que la performance du Canada sur le plan économique est relativement meilleure que celle d'autres pays.

Plan d'action économique du Canada

Lorsqu'on les interroge sur divers aspects du PAÉ, les participants ont tendance à évoquer le crédit d'impôt pour la rénovation domiciliaire (CIRD) et les dépenses en matière d'infrastructures. En général, les participants sont d'accord pour dire que les mesures prises sont tout à fait appropriées.

Projets du PAÉ pour l'avenir

En général, les participants s'entendent pour dire que le gouvernement doit tenir compte de l'importance de contrôler les dépenses dans les prochaines étapes du plan. En fait, ils reconnaissent que les dépenses devraient être contrôlées dans d'autres secteurs pour financer les projets du PAÉ à l'avenir. Les participants de tous les groupes doutent des avantages des réductions de l'impôt des sociétés. Les participants sont d'avis que les prochains projets du PAÉ devraient être orientés vers l'avenir et avoir pour objectif d'aider le Canada à relever les défis liés à un marché de plus en plus mondial et diversifié dans les années à venir.

Déficit

En général, les participants ne s'attendent pas à ce que le déficit budgétaire du Canada soit rapidement éliminé. La plupart d'entre eux souhaitent plutôt un retour progressif et durable vers l'équilibre budgétaire.



Ipsos Reid



**Qualitative Research
Winter 2011 - Economy Focus Groups
Key Findings**

February, 2011

Privy Council Office

Ce rapport est aussi disponible en français.

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Background and Research Objectives

The Communications and Consultation Secretariat of the Privy Council Office (PCO) provides advice and support to the Government of Canada, the Clerk of the Privy Council and to departments and agencies on matters relating to communications and consultations, and facilitates the coordination of the Government of Canada's activities in these areas.

In light of these objectives, PCO commissioned Ipsos Reid to conduct qualitative research involving focus groups among the general public in order to explore in more detail the concerns and the perceptions of Canadians on the state of Canada's economy.

Methodology

Ipsos-Reid conducted a series of 12 focus groups in six locations. In each location one group was conducted with members of the general public living in higher income households and a second group with individuals living in lower income households (with different income thresholds for lone vs. multiple adult households)

All focus group participants were either heads of household or co-heads of household. In addition, individual focus group composition reflected a mix of gender, age, and education levels.

The focus groups were conducted according to the following schedule:

| Location | Date | Time | Target Audience |
|----------------------|--------------------------|------------------|---|
| North Vancouver | January 31 st | 5:30pm 7:30pm | Lower household income Higher household income |
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Please note that this research is qualitative in nature and, therefore, the findings cannot be extrapolated to the Canadian population; they should be viewed as directional.



Key Findings

The key findings of this research are as follows:

Most important issues

Participants' concerns with regards to issues facing the country tended to be split between those with more of a social focus such as Canada's aging population, health care, poverty, immigration, and the environment (concerns about the impact and sustainability of a natural resource based economy) and those economic in nature, such as globalization, job loss and need for job creation, personal taxes and the rising cost of living to name a few.

Canada's economy

Participants tended to express cautious optimism when discussing Canada's economic prospects both in the short and medium term. More often than not they drew comparisons between our economy and that of the U.S. as well as certain European nations to explain this point of view. This is not to say that participants had no concerns about the state of Canada's economy rather that, more often than not, these concerns were tempered by their perception of Canada's relatively stronger performance vis-à-vis other nations.

Canada's Economic Action Plan

When asked about various elements of the EAP, participants tended to mention the Home Renovation Tax Credit (HRTC) and, infrastructure spending. The general consensus among participants tended to be that steps taken were indeed appropriate.

Future EAP initiatives

There was general agreement that, in terms of next steps, the Government needed to take into consideration the importance of spending control – in fact there was a recognition that spending controls in other areas would be necessary to ensure funding of EAP-type initiatives going forward. Participants in all groups questioned the benefits of corporate tax cuts. Participants felt the next round of EAP initiatives should be forward-looking and intended to help position Canada to take up the challenges of an increasingly global and diversified marketplace in years to come.

Deficit

Generally speaking, participants were not looking for a quick fix to Canada's budgetary deficit; rather, most felt that a gradual and steady return to balanced budgets was appropriate.





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Final Report**

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Detailed Findings

Most important issues facing Canada

As part of an initial discussion, participants were asked to reflect on issues most in need of attention from the federal government. As part of this exploration of their top-of-mind concerns, participants offered up a range of issues from those with more of a social focus such as Canada's aging population, health care, poverty, immigration, the environment (concerns about the impact and sustainability of a resource-based economy) as well as those related to Canada's economic prospects, including such issues as the impact of emerging economies and changing trade relationships on Canada's economy, and the importance of diversifying our trading partnerships beyond our traditional trading partner to the south. Participants also mentioned the need for more training and skills development to better equip Canada's workforce to deal with the increasing exodus of manufacturing jobs to emerging markets whose low labour costs make it increasingly difficult for Canada to compete. In addition a few, particularly those in the higher income cohort also expressed concern with Canada's debt.

That said, few mentioned the recent economic downturn unprompted and those who did qualified their response by saying that their impression was that Canada had weathered the storm as well as most and better than many. When pressed for reasons as to why this might be, a number of participants pointed to banking regulations which had contributed to lower levels of personal indebtedness. Others offered Canada's resource-based economy as the reason most likely to have insulated the country from the downturn and observed that this would continue to have a positive impact in terms of our country's economic resilience in the short term.

In short, most participants' entered the discussion with what could best be described as a sense of cautious optimism with regard to the state of the economy.

Canada's economy

That is not to say that participants had no concerns about the economy. Indeed, few indicated that they felt the economy was excellent or strong.

In order to better ascertain perceptions as they related to Canada's economy, participants were given a list of words and asked to identify those which in their opinion best described our economy at the present time. The figure below provides a graphic representation of words most often used.



As illustrated above participants' perceptions of Canada's economy can best be described as ranging from mixed to cautiously optimistic. Indeed, participants most commonly opted for more middle-of-the-road descriptions to characterize Canada's economy.

The two most common themes to emerge were:

A view that the economy was operating at status quo and had been for many years, and that vision and innovativeness would be necessary to navigate successfully the growing competitiveness challenges that Canada was facing in an increasingly global marketplace. References to preparing the workforce of tomorrow, training and choosing 'winning' sectors that would allow for sustained economic growth abounded here.

A concern that Canada was overly reliant on the United States for our economic well-being, and a desire to see Canada "regain a more independent stance" (it was clear in discussions that this transcended the economic realm to include independence in terms of security and defense policy as well). Although most participants understood that this trade relationship was an important one and that it was likely to remain so, several participants specifically expressed the desire to see Canada's trade reliance diluted by greater

diversification – references to the need to avoid placing too many eggs in one basket were often made in support of this position.

It is perhaps not surprising therefore that when specifically asked about what they perceived as potential threats to Canada's long-term economic stability many participants focused on the need to diversify trading relationships and focus on ensuring that the workforce of tomorrow was highly skilled rather than one that relied on traditional lower-paying blue collar work. The importance of education and training were often referenced during this discussion. In keeping with the aforementioned, a number of participants also mentioned the importance of creating opportunities for retraining workers currently employed in traditional manufacturing sectors which were increasingly transitioning to emerging markets where products could be produced at lower costs due to lower wage expectations.

In the course of this discussion, the issue of Canada's aging population was once again raised by participants, this time in terms of its implications for the economy. Conversations here tended to focus on the need for and importance of knowledge transfer within the workforce, again with a view to ensuring we were well positioned to compete in the global economy for years to come. Participants also expressed concerns about the ongoing costs and sustainability of Canada's social safety net in the context of a baby boomer generation that would undoubtedly become increasingly reliant on it.

Finally, there was some discussion of the dangers of personal and national debt levels and the importance of keeping these at manageable levels – references to the mortgage crisis in the U.S. were often made during this conversation. Of note, some participants pointed to recent changes to the mortgage lending rules as examples of sound government policy intended to guard against the perils of rising levels of personal debt.

Economic Action Plan (EAP)

When asked about EAP initiatives, participants tended to mention the home renovation tax credit (HRTC) and investments in infrastructure. Some participants also said they were aware of retraining opportunities for EI recipients but few made specific mention of the extension of EI benefits. Likewise, although most acknowledged that they did remember investments in the auto sector once prompted, very few mentioned this specific element of the EAP on their own.

While there was some reticence with regard to the EAP, most participants recognized that economic stimulus was the objective and acknowledged that the Government had done what needed to be done to keep Canada's economy going in the context of a global economic downturn.

A number of participants indicated they had minimal knowledge with regard to how EAP funds had been spent, and what specifically had been achieved, i.e. what were the outcomes. Although there was general agreement that EAP had likely worked, with evidence being that Canada had weathered the downturn better than most, specific numbers and examples to back this up would be welcomed.

Some participants felt that some of the EAP initiatives, specifically the HRTC and infrastructure spending had wrapped up too quickly though some others pointed out that the high costs associated with such programs made this unlikely. That said, there was a little bit of a 'what's next' type sentiment expressed in all sessions, with many wondering if there was a plan going forward to ensure our economic recovery would be sustained.

Future Initiatives

Participants were prompted with the following list of potential actions and were asked which ones in their opinion would likely be the most important to focus on to ensure continued strength in the economy

- Assisting the unemployed
- Investing in infrastructure projects
- Encouraging more foreign trade
- Lowering personal taxes
- Eliminating the federal budget deficit
- Lowering business taxes
- Improving access and quality of education and training
- Ensuring economic growth is environmentally sustainable
- Controlling spending

For the most part, participants felt that the list provided included an appropriate set of priorities, with the possible exception of lowering business taxes.

Controlling spending was seen as a very important element of the proposed actions. For a number of participants it was seen as the base that would enable the Government to deliver on the other listed priorities. More often than not participants spoke of the need for better management of government expenditures and spending choices.

Assistance for the unemployed was often framed in the context of creating opportunities for retraining and skills development rather than simply raising EI benefits.

Investments in infrastructure were generally regarded as appropriate and welcome. For the most part participants understood the short term (job creation), medium term (better roads, sewers, schools and hospitals etc) and longer term (legacy for future generations) benefits of infrastructure spending. Participants were generally of the view that infrastructure spending needed to be done on an ongoing basis, with some participants drawing a link between having modern infrastructure and being able to attract investment.

Participants were in favour of the idea of **encouraging more foreign trade**, particularly if the focus was on diversifying our trading relationships to reduce our dependence on the U.S. market. There was general agreement that Canada needed to move beyond being a supplier of raw resources to focus on the areas in which it could be a leader. References to creating a knowledge-based economy and a skilled labour force featured prominently in this discussion.

Ensuring environmentally sustainable growth was an appropriate and needed priority according to a number of participants. For many this was both a legacy issue (what kind of world are we leaving our children) and an opportunity to take a leadership position – developing economic growth that was mindful of environmental impacts.

Most participants recognized the importance of focusing on **improving access to and the quality of education and training**. Many felt there was a need to ensure we were prepared to take up jobs of the future and in so doing meet the challenges posed to our competitiveness by emerging markets. Again, this conversation tended to be framed in the context of the need for long-term vision.

There was moderate support for **lowering personal taxes**. For some, lowering personal taxes was seen as a way of encouraging consumer spending and consequently stimulating economic growth while others wondered aloud about the effectiveness of such a measure and how the Government would make up for lost revenues -- would this mean program cuts?

Initially, few participants recognized the potential benefits of **lowering business taxes**. More often than not, participants expressed the opinion that, while such reductions might be intended to encourage existing companies to stay in Canada and encourage others to establish operations here, in practice, the money that corporations saved because of any such tax cuts would likely simply end up benefiting shareholders and corporate executives. Participants were quick to opine that corporate tax cuts should only be considered if there were strings attached, for instance if corporations were required to create X number of jobs, or make X number of investments in Canada, or stay in Canada X number of years, in order to qualify for them.

While the notion that lowering corporate taxes would result in improved competitiveness/foreign investments was met with a fair amount of cynicism, a number of participants (reluctantly in some cases) did in the course of discussion eventually concede that this was likely in fact the case.

Deficit

When specifically prompted, most participants recognized that Canada was currently running an annual budget deficit. That said there was no strong sense of concern associated with this fact. More often than not, participants were quick to point out that all things considered, our economic situation was not as dire as that of some other countries, in particular in relation to the U.S. and Europe. Generally speaking, participants were not looking for a quick fix to Canada's budgetary deficit. Rather most felt that a gradual and steady return to balanced budgets was likely in order. Indeed there was very little interest expressed by participants in an aggressive deficit fighting stance by the Government.

Appendix A

State of the Economy Groups January 2011 - Screener

Hello, my name is _____. I'm calling from Ipsos-Reid, a national opinion research firm. We're organizing a focus group to explore issues of importance to the country. Focus Groups are discussions involving a small number of people that are brought together to talk about different topics. About ten people will be taking part, all of them randomly recruited by telephone just like you.

Participation is voluntary; all your answers will be kept confidential and will be used for research purposes only. We are simply interested in hearing your opinions – no attempt will be made to sell you anything. The format is a “round table” discussion lead by a research professional. An audio tape of the session will be produced for research purposes. The tapes will be used only by the research professionals to assist in preparing a final report on the research findings.

May I ask you a few questions?

Yes

No

1. Have I reached you at your home phone number:

| | |
|-----|---|
| Yes | CONTINUE |
| No | “MAY I SPEAK WITH SOMEONE WHO DOES LIVE HERE?” - THANK AND TERMINATE IF NON-RESIDENCE |

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

| | |
|-----|---------------------|
| Yes | CONTINUE |
| No | THANK AND TERMINATE |

3. How long have you lived in [XXX] insert city [**IF LESS THAN 2 YEARS THANK AND TERMINATE**]

4. Are you the head or co-head of your household?

| | |
|-----|---------------------|
| Yes | CONTINUE |
| No | THANK AND TERMINATE |

5. Please tell me if you or any member your immediate family works in or has retired from:

| | | |
|----------------------------------|---|---|
| A market research firm | Y | N |
| Media (radio, TV, print) | Y | N |
| An employee of a political party | Y | N |



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| | | |
|--|---|---|
| An advertising agency or a graphic design firm | Y | N |
| A public relations company | Y | N |
| An employee of a government department whether federal or provincial | Y | N |

IF YES TO ANY OF THE ABOVE, THANK AND TERMINATE

6. Would you be available to attend a discussion group January/February xx, 2010? It will last no more than two hours and you will receive \$85 for your time?

| | |
|-----|---------------------|
| Yes | CONTINUE |
| No | THANK AND TERMINATE |

7. Gender [BY OBSERVATION ONLY; DO NOT READ. RECUIT A 50/50 SPLIT IN EACH GROUP]

Female
Male

8. Which of the following best describes your employment situation? Are you... [READ LIST]

Employed full-time
Employed part-time
Retired
Currently not working SKIP TO Q9 –MAX 3 PER GROUP
Student SKIP TO Q9
Homemaker SKIP TO Q9 – MAX 2 PER GROUP
Other _____
Refused

9. And what sector of the economy do you work in? [ENSURE A GOOD MIX PER GROUP]

- Agriculture, Forestry, Fishing and Hunting
- Mining and oil and gas extraction
- Construction
- Manufacturing
- Wholesale Trade
- Retail Trade
- Transportation and warehousing
- Information and cultural industries
- Finance and Insurance
- Real estate and rental and leasing
- Professional, scientific and technical services



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- Management of companies and enterprises
- Administrative and support, waste management and remediation services
- Education services
- Utilities
- Health care and social assistance
- Arts, entertainment and recreation
- Accommodation and food services
- Public administration
- Other services (specify)

10. How old are you? Are you.... READ LIST

ENSURE A GOOD MIX OF AGES IN EACH GROUP

- 20-24 years
- 25-34 years
- 35-44 years
- 45-54 years
- 55-64 years
- 65 years and older
- Refuse/DK - THANK AND TERMINATE

11. Do you currently have children under the age of 18 living in the house with you?
[RECUIT GOOD MIX]

- Yes
- No

12. How many people above the age of 18 are there in your household?

| | |
|---------------|--------------|
| One | CONTINUE |
| More than One | SKIP TO Q 14 |

13. Was your household's income for 2009 greater or less than 75 thousand dollars?

| | |
|---------------------|--|
| 1. \$75K OR GREATER | CONTINUE FOR POSSIBLE RECRUIT TO GROUP 2 UNLESS EMPLOYMENT STATUS = STUDENT. IF EMPLOYMENT STATUS = STUDENT TERMINATE |
| 2. LESS THAN \$75K | CONTINUE FOR POSSIBLE RECRUIT TO GROUP 1 |

Refused 9 THANK AND TERMINATE

IF Q13=1, SKIP TO Q16

14. Was your household's income for 2009 greater or less than 100 thousand dollars?

| | |
|--------------|--|
| 1. \$100K OR | CONTINUE FOR POSSIBLE RECRUIT TO GROUP 2 |
|--------------|--|



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| | |
|---------------------|---|
| GREATER | UNLESS EMPLOYMENT STATUS = STUDENT. IF EMPLOYMENT STATUS = STUDENT TERMINATE |
| 2. LESS THAN \$100K | QUALIFIES FOR GROUP 1 |

Refused 9 THANK AND TERMINATE

IF Q14=1, SKIP TO Q16

15. IF Q13 OR Q14 =2 ASK: And would that be? **[ENSURE A GOOD MIX]**

- o Under \$20,000
- o Between \$20,000 and \$34,999
- o Between \$35,000 and \$44,999
- o Between \$45,000 and \$59,999
- o Between \$60,000 and \$74,999
- o [IF Q14=2] Between \$75,000 and \$99,999

16. Could you please tell me what is the last level of education that you have completed? **[ENSURE A GOOD MIX IN ALL GROUPS]**

- o Some high school
- o Completed high school
- o Some College/University
- o Completed College/University
- o RF/DK

17. Have you ever attended a consumer group discussion which was arranged in advance and for which you received a sum of money for participating?

| | |
|-----|----------------------------------|
| Yes | CONTINUE – MAX 1/3 PER GP |
| No | GO TO Q19 |

18. a. IF YES ABOVE, When was the last time you attended a group?

_____ TERMINATE IF IN THE PAST 6 MONTHS, IF NOT, CONTINUE

b. IF PAST ATTENDER, How many focus groups have you attended in the past 5 years?

_____ **[TERMINATE IF MORE THAN 4]**

19. If you suddenly had a million dollars, what would do you? (THE PURPOSE OF THE QUESTION IS TO TEST HOW ARTICULATE THE RESPONDENT IS IN EXPRESSING HIMSELF OR HERSELF).

INTERVIEWER: USE THIS QUESTION TO TEST HOW ARTICULATELY RESPONDENT EXPRESSES HIM/HERSELF. IF RESPONDENT IS INARTICULATE OR UNCOMMUNICATIVE, THANK AND TERMINATE.



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.

Read to Stand-by Respondents

Thank you for answering my questions. Unfortunately, at this time, the group you qualify for is full. We would like to place you on our stand-by list. This means that if there is an opening in the group, we would then call you back and see if you are available to attend the group. May I please have a daytime contact number, an evening contact number an email address, if you have one, so that we can contact you as soon as possible if an opening become available? [RECORD CONTACT INFO]

| Location | Date | Time | Target Audience |
|---|--------------------------|------------------|--|
| Vancouver (All recruits to be from North Vancouver) | January 31 st | 5:30pm 7:30pm | Low/middle household income High household income |
| Winnipeg | February 1 st | 5:30pm 7:30pm | Low/middle household income High household income |
| Kitchener | February 2 nd | 5:30pm 7:30pm | Low/middle household income High household income |
| Toronto (downtown) | February 3 rd | 5:30pm 7:30pm | Low/middle household income High household income |
| St John's | February 8 th | 5:30pm 7:30pm | Low/middle household income High household income |
| Quebec City | February 9 th | 5:30pm 7:30pm | Low/middle household income High household income |

As I mentioned earlier, the group discussion will take place, January/February xx @ 5:30pm/7:30pm for no more than 2 hours. The Government of Canada is sponsoring this research. All those who participate will receive an \$85 honorarium as a thank you for their time. Would you be willing to attend?

| | |
|-----|---------------------|
| Yes | CONTINUE |
| No | THANK AND TERMINATE |

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:
TO BE UPDATED



| CITY | Facility address |
|---------------------------|-----------------------------------|
| North Vancouver | Ipsos Reid |
| Winnipeg | NRG |
| Kitchener | PMG (located in Waterloo) |
| Toronto (Downtown) | Head Research (Bay Street) |
| St John's | TBD |
| Quebec City | SOM Research (Ste-Foy) |

We ask that you arrive at least 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 respondent's identification prior to the group, so please be sure to bring some personal identification with you (i.e. driver's license). Also, if you require glasses for reading, please bring them with you.

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 SO THAT WE MAY GET SOMEONE TO REPLACE YOU. You can reach us at 1-xxx-xxx-xxxx at our office. Someone will call you the day before to remind you about the discussion.

What would be a good time to reach you?
 And at what telephone numbers?
 May I please get your name? ON FRONT PAGE
 Thank you for very much for your help!



Janvier 2011- Questionnaire de recrutement

Bonjour, ici _____ d'Ipsos-Reid, une firme nationale d'études de marché. Nous organisons actuellement un groupe de discussion pour étudier certains enjeux importants pour le pays. Un groupe de discussion est une rencontre où un petit nombre de personnes se réunissent pour parler de différents sujets. Environ dix personnes prendront part au groupe de discussion que nous organisons et elles auront toutes été recrutées au hasard par téléphone comme vous.

La participation est volontaire et toutes vos réponses seront tenues confidentielles et ne seront utilisées qu'aux fins de l'étude. Nous désirons simplement connaître votre opinion – en aucun cas nous ne tenterons de vous vendre quoi que ce soit. Il s'agit d'une rencontre de type « table ronde » qui sera menée par un professionnel des études de marché et elle sera enregistrée aux fins de l'étude. Les enregistrements seront utilisés seulement par les professionnels des études de marché pour les aider dans la rédaction de leur rapport définitif sur les résultats obtenus.

Puis-je vous poser quelques questions?

Oui

Non

1. Est-ce que je vous ai joint à votre numéro de téléphone à la maison?

| | |
|-----|--|
| Oui | CONTINUER |
| Non | « PUIS-JE PARLER À UNE PERSONNE QUI HABITE LÀ? » – REMERCIER ET CONCLURE SI LA PERSONNE N'HABITE PAS À CET ENDROIT |

2. Êtes-vous un citoyen canadien d'au moins 20 ans qui réside normalement dans la région de [XX]?

| | |
|-----|-----------------------|
| Oui | CONTINUER |
| Non | REMERCIER ET CONCLURE |

3. Depuis combien de temps vivez-vous à [XXX] insérer la ville **[SI MOINS DE 2 ANS, REMERCIER ET CONCLURE]**

4. Êtes-vous le chef ou l'un des chefs de votre foyer?

| | |
|-----|-----------------------|
| Oui | CONTINUER |
| Non | REMERCIER ET CONCLURE |



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5. Veuillez me dire si vous-même ou un membre de votre famille immédiate travaillez ou avez travaillé dans l'un des domaines suivants et êtes maintenant à la retraite :

| | | |
|--|---|---|
| Une firme d'études de marché | O | N |
| Les médias (radio, télé, journaux) | O | N |
| Employé d'un parti politique | O | N |
| Une agence de publicité ou de graphisme | O | N |
| Une agence de relations publiques | O | N |
| Un ministère du gouvernement fédéral ou provincial | O | N |

SI OUI À L'UN OU L'AUTRE, REMERCIER ET CONCLURE

6. Seriez-vous libre pour participer à un groupe de discussion le xx janvier/février 2010? La rencontre ne durera pas plus de deux heures, et vous recevrez une somme de 85 \$ en guise de remerciement pour votre temps.

| | |
|-----|-----------------------|
| Oui | CONTINUER |
| Non | REMERCIER ET CONCLURE |

7. Sexe [PAR OBSERVATION SEULEMENT; NE PAS LIRE. REGROUPER UN MÉLANGE 50/50 DANS CHAQUE GROUPE]

- Femme
- Homme

8. Lequel des énoncés suivants décrit le mieux votre situation d'emploi? Êtes-vous... [LIRE LA LISTE]?

- Employé à temps plein
- Employé à temps partiel
- À la retraite
- Actuellement sans emploi PASSER À LA Q9 – MAX. 3 PAR GROUPE
- Étudiant PASSER À LA Q9
- Au foyer PASSER À LA Q9 – MAX. 2 PAR GROUPE
- Autre _____
- Refus

9. Et dans quel secteur de l'économie travaillez-vous? [ASSURER UN BON MÉLANGE DANS CHAQUE GROUPE]

- Agriculture, foresterie, chasse et pêche
- Mines et extraction de pétrole et de gaz
- Construction
- Fabrication
- Commerce de gros
- Commerce de détail
- Transport et entreposage



- Industries de l'information et de la culture
- Finances et assurances
- Immobilier et location/crédit-bail
- Services professionnels, scientifiques et techniques
- Gestion d'entreprises et de sociétés
- Administration et soutien, services de gestion des déchets et de réhabilitation
- Services d'éducation/d'enseignement
- Services publics
- Soins de santé et aide sociale
- Arts, divertissement et loisirs
- Hébergement et services alimentaires
- Administration publique
- Autres services (préciser)

10. Quel âge avez-vous? Avez-vous... LIRE LA LISTE

ASSURER UN BON MÉLANGE D'ÂGES DANS CHAQUE GROUPE

20 à 24 ans

25 à 34 ans

35 à 44 ans

45 à 54 ans

55 à 64 ans

65 ans et plus

Refus/NSP – REMERCIER ET CONCLURE

11. Y a-t-il des enfants de moins de 18 ans qui habitent avec vous à la maison en ce moment? [RECRUTER UN BON MÉLANGE]

Oui

Non

12. Combien d'enfants de moins de 18 ans compte votre foyer?

| | |
|-----------|-----------------|
| Une | CONTINUER |
| Plus d'un | PASSER À LA Q14 |

13. Le revenu de votre foyer en 2009 a-t-il été supérieur ou inférieur à 75 000 \$?

| | |
|-----------------------|---|
| 1. 75 000 \$ OU PLUS | CONTINUER POUR UN RECRUTEMENT POSSIBLE DANS LE GROUPE 2 À MOINS QUE LA SITUATION D'EMPLOI = ÉTUDIANT. SI SITUATION D'EMPLOI = ÉTUDIANT, CONCLURE |
| 2. MOINS DE 75 000 \$ | CONTINUER POUR UN RECRUTEMENT POSSIBLE DANS LE GROUPE 1 |

Refus 9 REMERCIER ET CONCLURE

SI Q13 = 1, PASSER À LA Q16

14. Le revenu de votre foyer en 2009 a-t-il été supérieur ou inférieur à 100 000 \$?

| | |
|------------------------|---|
| 1. 100 000 \$ OU PLUS | CONTINUER POUR UN RECRUTEMENT POSSIBLE DANS LE GROUPE 2 À MOINS QUE LA SITUATION D'EMPLOI = ÉTUDIANT. SI SITUATION D'EMPLOI = ÉTUDIANT, CONCLURE |
| 2. MOINS DE 100 000 \$ | ADMISSIBLE AU GROUPE 1 |

Refus 9 REMERCIER ET CONCLURE

SI Q14 = 1, PASSER À LA Q16

15. SI Q13 OU Q14 = 2, DEMANDER : Diriez-vous qu'il a été de? **[ASSURER UN BON MÉLANGE]**

- Moins de 20 000 \$
- 20 000 \$ à 34 999 \$
- 35 000 \$ à 44 999 \$
- 45 000 \$ à 59 999 \$
- 60 000 \$ à 74 999 \$
- [SI Q14 = 2] 75 000 \$ à 99 999 \$

16. Pourriez-vous me dire quel est le dernier niveau de scolarité que vous avez terminé? **[ASSURER UN BON MÉLANGE DANS TOUS LES GROUPES]**

- Études secondaires en partie
- Diplôme d'études secondaires
- Études collégiales/universitaires en partie
- Diplôme d'études collégiales/universitaires
- Refus/NSP



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17. Avez-vous déjà participé à un groupe de discussion de consommateurs, organisé à l'avance et pour lequel vous avez reçu une somme d'argent?

| | |
|-----|---------------------------------------|
| Oui | CONTINUER – MAX 1/3 PAR GROUPE |
| Non | PASSER À LA Q19 |

18. a. SI OUI CI-DESSUS, À quand remonte la dernière fois que vous avez participé à un groupe de discussion?

_____ CONCLURE SI AU COURS DES SIX DERNIERS MOIS. SI NON, CONTINUER.

b. SI ANCIEN PARTICIPANT, À combien de groupes de discussion avez-vous participé au cours des cinq dernières années?

_____ **[CONCLURE SI PLUS DE 4]**

19. Si vous aviez soudainement un million de dollars, que feriez-vous? (LE BUT DE LA QUESTION EST DE MESURER LA CAPACITÉ DU RÉPONDANT À S'EXPRIMER.)

INTERVIEWER : UTILISER CETTE QUESTION POUR MESURER LA CAPACITÉ DU RÉPONDANT À S'EXPRIMER. SI LE RÉPONDANT A DU MAL À S'EXPRIMER OU À COMMUNIQUER, REMERCIER ET CONCLURE.

CONCLURE SI LE RÉPONDANT DONNE UNE RAISON COMME UN PROBLÈME D'OUÏE OU DE VUE, UN PROBLÈME POUR ÉCRIRE OU S'EXPRIMER OU S'IL CRAINT DE NE PAS ÊTRE CAPABLE DE COMMUNIQUER DE FAÇON EFFICACE.

Lire aux répondants de réserve

Merci d'avoir répondu à mes questions. Malheureusement, à l'heure actuelle, le groupe auquel vous êtes admissible est complet. Nous aimerions toutefois vous inscrire sur notre liste de répondants de réserve. Cela signifie que si une place se libère dans le groupe, nous vous rappellerons pour savoir si vous êtes libre pour participer à la rencontre. Puis-je avoir un numéro de téléphone où nous pouvons vous joindre le jour et le soir ainsi que votre adresse de courriel, si vous en avez une, pour que nous puissions vous joindre le plus rapidement possible si une place se libère? [INSCRIRE LES COORDONNÉES DU RÉPONDANT]

| Emplacement | Date | Heure | Public cible |
|--|-------------------------|--------------------|---------------------------------------|
| Vancouver (tous les participants recrutés doivent être de North Vancouver) | 31 janvier | 17 h 30 19 h 30 | Revenu familial faible/moyen |
| Winnipeg | 1 ^{er} février | 17 h 30 19 h 30 | Revenu familial élevé faible/moyen |
| Kitchener | 2 février | 17 h 30 19 h 30 | Revenu familial élevé faible/moyen |
| Toronto (centre-ville) | 3 février | 17 h 30 | Revenu familial élevé familial |



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| | | | |
|-----------------|-----------|---------|-----------------------|
| Saint John's | 8 février | 19 h 30 | faible/moyen |
| | | 17 h 30 | Revenu familial élevé |
| Ville de Québec | 9 février | 19 h 30 | Revenu familial |
| | | 17 h 30 | faible/moyen |
| | | 19 h 30 | Revenu familial élevé |
| | | 17 h 30 | Revenu familial |
| | | 19 h 30 | faible/moyen |
| | | 19 h 30 | Revenu familial élevé |

Comme je l'ai mentionné plus tôt, le groupe de discussion se tiendra le xx janvier/février à 17 h 30/19 h 30 et ne durera pas plus de deux heures. L'étude en question est commanditée par le gouvernement du Canada. Tous les participants recevront une somme de 85 \$ en guise de remerciement pour leur temps. Accepteriez-vous de participer?

| | |
|-----|-----------------------|
| Oui | CONTINUER |
| Non | REMERCIER ET CONCLURE |

Avez-vous un crayon à portée de main pour noter l'adresse où se tiendra la rencontre? Elle aura lieu à :

À METTRE À JOUR

| VILLE | Adresse |
|-------------------------------|--|
| North Vancouver | Ipsos Reid |
| Winnipeg | NRG |
| Kitchener | PMG (à Waterloo) |
| Toronto (centre-ville) | Head Research (Bay Street) |
| Saint John's | À déterminer |
| Ville de Québec | SOM Recherches et sondages (Sainte-Foy) |

Nous vous prions d'arriver au moins quinze minutes avant le début de la rencontre pour vous donner le temps de trouver un stationnement, de trouver l'endroit où se tient la rencontre et de vous enregistrer auprès des animateurs. Les animateurs pourraient vérifier l'identité des participants avant le début de la rencontre. Par conséquent, n'oubliez pas d'apporter une carte d'identité personnelle (p. ex. votre permis de conduire). De plus, n'oubliez pas d'apporter vos lunettes de lecture si vous en avez besoin.

Étant donné que nous invitons seulement quelques personnes, votre présence est très importante pour nous. SI, POUR QUELQUE RAISON QUE CE SOIT, VOUS NE POUVEZ PAS VOUS PRÉSENTER, VEUILLEZ NOUS TÉLÉPHONER POUR QUE NOUS PUISSIONS TROUVER UNE PERSONNE POUR VOUS REMPLACER. Vous pouvez nous joindre à nos bureaux au 1 xxx xxx-xxxx. Un de nos représentants vous téléphonera la veille de la rencontre pour confirmer votre présence.



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À quel moment serait-il préférable que nous rappelions?
Et à quels numéros de téléphone?
Puis-je avoir votre nom? SUR LA PAGE COUVERTURE
Merci beaucoup de votre aide.



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Appendix B

Moderator's Guide

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 (25 Minutes)

- Thinking of the issues facing Canada today, which one would you say the Government of Canada should focus on most? FLIP CHART – PROBE
- What makes you say that?

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.

- Overall, how is Canada's economy doing? What makes you say that?
- What do you feel is going well? What do you feel is not going well?
- Have you seen or heard of any specific actions or steps taken to help Canada's economy? [RECORD ON FLIP CHART]
- SHOW OF HANDS BUT NO DISCUSSION YET: Who has heard of the Economic Action Plan?
- BRIEFLY DESCRIBE THE EAP: The Economic Action Plan was the Government of Canada's response to the economic crisis that began in 2008. It consisted of a variety of measures such as investment in infrastructure projects, tax incentives such as the Home Renovation Tax Credit, changes to employment insurance and loans to the auto manufacturing sector.
 - SHOW OF HANDS: Now that I've described it to you, how many recall having heard about the EAP?



- WORD ASSOCIATION: Before we have a discussion about it, using the list of adjectives I'm going to provide to you, I'd like you to circle the two or three words that you feel best describe the Economic Action Plan.
 - Once you've picked the words you feel best describe it, I'd now like to to underline the word or words you would wish described it.
 - Go around the table asking people to identify their choices and after you've heard them all, begin a discussion on why they feel those words apply. (Or, are the words they WISH applied)
- What are your views on the EAP?
 - Is it something that should continue? Permanently? For a long time? For a short time?
- How do you think things will be one year from now? What about 5 years from now? What are the biggest threats to or concerns you have about Canada's economy? PROBE IF NECESSARY:
- 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?)
- Where do you think Canada's economy is headed? Are you optimistic about the future? What makes you say that?
- How does Canada's situation compare with those of other countries?
 - Probe on economy, deficit
 - If different, how so?
- What internal factors will most affect our economic future?
- What external factors will most affect our economic future?

GOVERNMENT ACTION ON THE ECONOMY [40 Minutes]

- What do you think the Government should be doing about the economy? [RECORD ANSWERS 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?
- Based on what you know, what is the current state of federal government finances, do you think the government is running an annual deficit – spending more money than they are receiving – or running an annual surplus – receiving more money than they are spending – or in your opinion is Canada's budget balanced?
- In fact Canada is currently in a deficit situation. What kinds of things do you think the Government should be doing in order to address this situation? What actions specifically need to be taken (give me specific examples)?



[MODERATOR INFO – 2011/2012 budget deficit projected to be \$45.4 billion. National cumulative debt stands @ \$540 billion as of October 2010 - Check with PCO to verify these numbers]

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.



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Guide du modérateur

INTRODUCTION (5 minutes)

MISE EN TRAIN : Contexte général (25 minutes)

- Si vous songez aux enjeux auxquels le Canada est confronté en ce moment, lequel devrait recevoir le plus d'attention de la part du gouvernement du Canada selon vous? TABLEAU DE PAPIER – SONDER – S'ASSURER QUE LES PARTICIPANTS SE CONCENTRENT SUR LES ENJEUX DU GOUVERNEMENT FÉDÉRAL
- Qu'est-ce qui vous fait dire cela?

SITUATION ÉCONOMIQUE (15 minutes)

- Dans l'ensemble, comment se porte l'économie du Canada? 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?
- Avez-vous confiance en l'économie canadienne?
- Quelles sont les plus grandes menaces ou vos plus grandes préoccupations en ce qui concerne l'économie canadienne? [PRÉOCCUPATIONS SUR LE TABLEAU DE PAPIER]

ACTIONS DU GOUVERNEMENT EN CE QUI CONCERNE L'ÉCONOMIE (40 minutes)

- Avez-vous entendu parler d'actions ou de mesures particulières pour favoriser l'économie du Canada? [INSCRIRE SUR LE TABLEAU DE PAPIER – SONDER SUR LE PAE EN PARTICULIER.]
- AU BESOIN : Comme vous le savez peut-être, la première étape du Plan d'action économique comportait des dépenses à grande échelle pour stimuler l'emploi et la croissance pendant la récession mondiale. Bien que la première étape du gouvernement (stimulation) tire à sa fin, le Plan d'action économique continuera de jouer un rôle pour soutenir l'économie canadienne.

ASSOCIATION D'ACTIONS

- Sonder sur des actions en particulier. De quelle façon ces actions sont-elles utiles? Y a-t-il quelque chose qui manque? Quelle est la plus importante mesure de la prochaine étape du PAE et pourquoi?
- Selon vous, quelles autres mesures devrait prendre le gouvernement pour que l'économie canadienne reste concurrentielle à l'échelle internationale et continue d'attirer des investissements et de créer des emplois? [INSCRIRE LES RÉPONSES SUR LE TABLEAU DE PAPIER]
- Savez-vous qu'un budget fédéral sera déposé en mars? Quelles sont vos attentes par rapport au contenu de ce budget? Qu'aimeriez-vous y trouver?



DÉFICIT [30 minutes]

- À votre connaissance, quel est l'état actuel des finances du gouvernement fédéral – selon vous, le gouvernement accuse-t-il un déficit annuel (dépense-t-il plus d'argent qu'il en reçoit), enregistre-t-il un excédent annuel (reçoit-il plus d'argent qu'il en dépense), ou a-t-il atteint l'équilibre budgétaire?
- Comment la situation du Canada se compare-t-elle à celle d'autres pays?
 - Sonder sur l'économie, le déficit
 - S'il y a lieu, en quoi est-elle différente?
- [SI LES PRIORITÉS DU GOUVERNEMENT EN MATIÈRE DE DÉPENSES SONT MENTIONNÉES] Le gouvernement a-t-il fait des progrès pour ce qui est de faire des choix de dépenses efficaces?
- En fait, le Canada est actuellement en situation de déficit. À votre avis, quels genres de mesures le gouvernement devrait-il prendre pour remédier à cette situation? Quelles mesures doivent être prises en particulier?

CONCLUSION [5 minutes]

Nous avons couvert un grand nombre de sujets et je vous remercie d'avoir consacré du temps et de l'énergie pour venir partager votre opinion ici aujourd'hui. Votre opinion est très importante et éclairante! Pour conclure, j'aimerais savoir si vous avez d'autres commentaires que vous voudriez communiquer au gouvernement du Canada.