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Report

PERCEPTION OF CANADA AND CETA IN FRANCE - QUALITATIVE RESEARCH

Presented to Global Affairs Canada

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This public opinion research report presents the results of focus groups and a telephone survey conducted by Leger and its French partner, BVA, for Global Affairs Canada. The quantitative portion of this study was conducted among 1,005 French nationals between March 8 and 11, 2019.

Cette publication est également disponible en français sous le titre : Perception des français à l'égard du Canada et du CETA : recherche qualitative.

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1. SUMMARY

Leger is pleased to present to Global Affairs Canada this report on the results of qualitative and quantitative surveys on the French's perceptions of Canada and CETA.

This report was prepared by Leger, which was mandated by Global Affairs Canada (contract No. 08324-180470/001/CY, granted on January 14, 2019), in partnership with its counterpart: BVA.

1.1 Background and Objectives

The Comprehensive Economic and Trade Agreement (CETA) is an international free-trade agreement signed on October 30, 2016 between the European Union and Canada, which provisionally entered into force on September 21, 2017. This agreement, which significantly reduces tariff and non-tariff barriers, also addresses several aspects related to the export of goods and services and the establishment of a stable and favourable investment environment for both European and Canadian companies. Although the ratification process has been completed in Canada, it is still in progress in some EU Member States, notably France.

It is in this context that Global Affairs Canada commissioned Leger to conduct a study to understand the general perception that the French have of Canada and Canadians, and more specifically CETA.

Goals:

- Determine the level of knowledge of the French regarding Canada, beyond stereotypical images of the cold climate, lumberjacks, etc.
- Identify the values that the French perceive as inherent to Canada (multilateralism, multiculturalism, economic liberalism, social equity, tolerance, etc.)
- Identify what the French think of Canada's approach to environmental protection and the standards in place to ensure the safety and nutritional value of food sold in Canada
- Determine whether or not the general French population is willing to increase its trade relations with Canada
- Determine whether the French see Canada as a powerful ally for France and Europe in the fight against populism in the world
- Measure the impact of key messages, especially those on the CETA (economic development, environment, health/food safety, progressive trade activities, geopolitics, etc.)

1.2 Methodology – Hybrid Research

To achieve the goals of the study, a research plan based on a hybrid method (i.e. qualitative and quantitative) was developed. First, a qualitative methodology based on focus groups with Parisians and Lyoneses was implemented, followed by a quantitative methodology consisting of a telephone survey of the general population of France. The two methodologies were used to explore and assess the perceptions and image of Canada and Canadians in France as well as the French’s knowledge and opinions about the CETA.

1.2.1 Qualitative methodology

Leger organized a series of four focus groups in France with participants from the general population. Two groups were conducted in the greater Paris area, and two other groups were organized in Lyon to obtain the views of the population living outside the French capital.

In order to participate in the groups, participants had to be 18 years of age or older and have some knowledge of Canada. Those who said they did not know anything about Canada or had nothing to say about Canada were excluded during recruitment. The focus groups were conducted in French, and each session lasted two hours. Based on BVA’s professional advice, a group of young people under 40 years of age and a group of people 40 years of age and over were recruited in each city.

Locations and dates

The focus groups were organized in the following cities on the dates indicated.

Table 1. Recruitment details

City	Recruited	Participants	Target population	Time	Language	Date
Paris	10	9	18 to 39 y.o.	3:00 p.m.	FR	February 12
Paris	10	10	40+ y.o.	7:00 p.m.	FR	February 12
Lyon	10	9	40+ y.o.	3:00 p.m.	FR	February 13
Lyon	10	10	18 to 39 y.o.	6:00 p.m.	FR	February 13
Total	40	37				

The recruitment guide and the discussion guide used for this portion of the study are presented in the Appendix to this report.

Note regarding the limitations of qualitative research

Qualitative research allows for a better understanding of opinions within a population rather than measuring opinions as a percentage, as is the case with a quantitative study. The results of this type of research should be

considered purely indicative. No conclusions about the general population can be inferred from the results of this type of research.

Note to the reader

This report is only about the qualitative portion of the study. For more information on the quantitative portion of the study, please refer to the report, “Perception of Canada and CETA in France - Quantitative Research.”

1.3 Overview of the findings

Discussions with focus group participants demonstrated that most of them felt a particular closeness to Canada. Many participants reported having friends or family members who had gone to study, work, or settle in Canada. Canada has never seemed as close to France as it is today. The election of Justin Trudeau also helped raise Canada’s profile in France and highlighted Canada’s founding democratic values. Beyond Canada’s traditional and clichéd perceptions of vast, pristine spaces populated with wildlife, participants were familiar with and could describe some of the core values of the Canadian identity, such as openness to difference, tolerance, freedom, and multiculturalism, which are intimately associated with the image of Canada. Their image of Canada and of its values seemed very positive at first glance. However, it proved to be much more nuanced when we delved into their opinions.

Nevertheless, it was clear that Canada has an indisputable power of attraction. Only a few of the participants reported that they had never had any connection with Canada. Many of the participants had either already thought about travelling, studying, or working in Canada or said they know someone who has considered doing the same.

Generally speaking, the participants felt that Canada has an excellent reputation, and while the economy is not the main factor influencing the overall image of the country, participants perceived Canada as a reliable economic partner for France. Although Canadian companies and brands are still not well known, the overall perception of Canadian products was positive, with participants perceiving them to be of good quality.

Canada truly stood out in the minds of participants for the quality of its education system and the high level of its academic research. This perception was very strong, particularly with regard to engineering education. The participants primarily associated the natural resource sectors, such as forestry and mining, with the Canadian economy.

Canada also distinguishes itself through its cultural presence and offerings. It is quite well recognized that Canada is internationally renowned for its artists. Interestingly, the participants were able to identify Canadian

artists—both Anglophone and Francophone—and not just the most famous singers from Quebec. In fact, their perception of Canada was not focused solely on the image of French-speaking Quebec, but demonstrated an understanding of the reality of Canada as a whole.

CETA

The participants' opinion on CETA was not fixed and seemed to be evolving. Their opinion was both positive and negative. The qualitative component revealed spontaneous concerns often underpinned by Canada's economic and cultural proximity to the United States: the presence of GMOs, hormones, antibiotics, and pesticides in products. Standards were thought to be a major issue for CETA. Apart from agri-food products, the other aspects of CETA were much less a cause of concern and were rather highly considered: labour-force mobility, investment, etc. However, business and investment opportunities for French companies were less favourably or even poorly perceived.

Canadian products were generally not well known, but a certain interest was noted. Maple syrup, clothing and textiles, cosmetics, and fish and seafood were among the top Canadian products of interest to participants. They, however, showed less interest in Canadian meat.

The participants of the qualitative study viewed the environmental impact of free trade as an issue. They reported feeling worried about the carbon footprint resulting from increased trade between France and Canada, especially for imported products that are already available in Europe. However, in each focus group, this criticism focused more on the very idea of liberalism and international trade rather than on Canada itself.

Qualitatively, the study showed that objective data on CETA and its provisional implementation improved the overall perception that the French have of CETA with respect to labour-force mobility, the protection of some 40 French PDOs/RDOs¹, increased French exports, the absence of private arbitration tribunals to protect investments, and the inadequacy of Canadian farms when it comes to exporting beef to Europe.

The qualitative study also revealed a strong desire for more information on CETA, particularly on the environment, temporary work opportunities, standards, and health issues.

1.4 Use of Results

The results of this research will enable Global Affairs Canada to update and adjust its messages to ensure that its awareness and communication strategies will have a positive impact on the target audience upon ratification of the CETA.

¹ PDO (protected designation of origin), RDO (registered designation of origin)

1.5 Notes on the Interpretation of Research Findings

The opinions and observations expressed in this document do not reflect those of Global Affairs Canada. This report was drawn up by Leger based on research conducted specifically for this project. The results of the qualitative portion of the study cannot be generalized to the entire French population. These results should be interpreted as a collection of opinions existing among the French population. The results of the quantitative portion are of a probabilistic nature and can be generalized to the entire French population.

General Information

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1.6 Political neutrality statement and contact information

I hereby certify as a senior officer at Leger that the deliverables fully comply with the Government of Canada's political neutrality requirements outlined in the [Policy on Communications and Federal Identity](#) and the [Directive on the Management of Communications – Appendix C](#) (Appendix C: Mandatory Procedures for Public Opinion Research).

Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, party positions, or ratings of the performance of a political party or its leaders.

Signed by:

A handwritten signature in blue ink, appearing to read "Christian Bourque".

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2. Detailed results

2.1 General perception of Canada – Focus group results

This section of the report presents the results of the four focus groups on the perceptions and images associated with Canada in France. Because the survey is qualitative in nature, its results cannot be considered representative of the general opinion in France with regard to Canada. It rather consists of a collection of opinions and perceptions existing among the French population. However, it is not possible to quantify this information.

General perception of Canada

In the first part of the focus groups, the facilitators asked the participants to write down three words or expressions that come to mind when they think of Canada. This was done before even mentioning the topic of the meeting. This approach allowed for spontaneous answers that had not been fully thought out in terms of perceptions associated with Canada. It was only after this first exercise that the facilitators revealed the topic of the discussion to the participants.

A positive image of Canada, overall

From the outset, the focus group participants articulated a fundamentally positive view of Canada. They did not perceive Canada as a truly foreign country; they reported feeling a strong proximity—even a certain kinship—between France and Canada. This perceived closeness is built on common ancestors, a common history, and a shared language. Canadians are seen as their North American cousins, the Francophones of North America. It should be noted that linguistic proximity to France is central to this perception of Canada. Because of this perception, Quebec sprung to the participants' minds first. However, the focus groups also displayed a fairly extensive knowledge of English Canada, in terms of geography or cities and public figures.

Their perception was also modelled on the stereotypes and clichés associated with Canadian values and the country's territory namely: a welcoming, safe, tolerant, multicultural, free country and a vast, frozen, pristine, natural territory with abundant wildlife.

A country of nature

Not surprisingly, the words mentioned most often in the focus groups were about nature, which dominated the perception of Canada. The following words were those most frequently mentioned: greenery, fall colours (orange), wide-open spaces, vastness, forests, lakes, the St. Lawrence River, natural parks (Jacques-Cartier), wilderness camping, wildlife (caribou, bears, whales), and sled dogs. For some participants, this natural image also implied the idea of a variety and abundance of natural resources.

Territories, cities, and places

When thinking about Canada, participants spontaneously imagined specific territories, cities, and sites. The idea of large, Americanized cities was also a recurring theme; the image of the country's largest cities (Montréal, Toronto, and Vancouver) was associated with Canada. Natural tourist attractions, such as Niagara Falls and Parc national de la Jacques-Cartier, also shaped their perceptions of the country.

Canadian symbols

Some symbols were also deeply rooted in the participants' minds about the image they have of Canada. Maple syrup, the maple leaf on the flag, and even poutine were some of the elements that spontaneously came to mind when they thought about Canada. In addition to these iconic symbols, hockey, curling, figure skating, rugby, and football were among the strong symbols spontaneously associated with Canada.

Public figures

The public figure most frequently mentioned by the participants was Céline Dion. That is no surprise given her status as an international star. She is still very well known in France, and was mentioned in all the focus groups. Garou, Lara Fabian, and Anthony Kavanagh are also well known and were mentioned in several groups. These Francophone artists from Quebec generally have a fairly positive image among the French public and are part of the perceptions that structure the image of Canada. In addition to Quebec artists, participants in both Paris and Lyon groups mentioned knowing English-Canadian artists. Leonard Cohen, Justin Bieber, Drake, and Ryan Reynolds were among the Anglophone artists known to the participants.

Canada's image is more mixed than it seems

This image of Canada, delivered spontaneously by focus group participants, was rather smooth and generally positive. However, upon further querying, it became clear that Canada's image was not as rosy as it appeared; opinions were more nuanced and critical. Contrasting perceptions were sometimes observed on the topics that provoked debate in the focus groups (e.g. multiculturalism, tolerance, the environment, and economic liberalism).

Tolerance

Canada was generally seen as an open and tolerant country. In all groups, this aspect of Canada was spontaneously put forward. The country's multiculturalism was seen as a fundamental value. The participants described Canada as welcoming, warm, and open to immigration and differences. The fact that Canada is a country of immigration seemed to be well known in France. A few participants also pointed out that this openness to difference on other aspects, such as same-sex marriage, is more progressive than in France. As such, they believed that many French may have immigrated to Canada in the hope of availing themselves of this right.

However, this image was tempered by conflicting perceptions. Canada was at the same time seen as a homogeneous country, with the exception of its cities, where diversity was mainly an impression. The participants believed that Canada selects its immigrants according to very strict criteria, which gives the impression that the country is elitist: the doors are not open to "just anybody." Having the right diploma and training is required to immigrate to Canada. As a result, the participants did not see the country as a welcoming place for refugees, thus overshadowing the humanitarian aspect of immigration.

One of the negative aspects highlighted by the participants concerned Indigenous people. The impression was that they are placed on reserves, that they are penned in, or that the police can move them to make way for pipeline projects.

Economic liberalism

From an economic standpoint, Canada was defined as a liberal country. Anything that involves business or trade was perceived as simpler in Canada than in France. For many participants, doing business in Canada seemed less complicated than in France. According to them, Canadian companies are freer than French companies. They are less subject to government rules and oversight than companies in France.

However, economic liberalism was also viewed negatively by the participants, some of them mentioning that they were convinced the Canadian government imposes few standards on its companies whereas France imposes many more. Quality standards were thus perceived as inferior to those of France, which had a negative impact on the perception of products from Canada.

Environmental protection

Most participants spontaneously had a positive image of Canada's environment. They believed that Canada is ahead of France in terms of recycling, waste management, and overall environmental protection. This perception was fuelled by Canada's tourism advertising in France, which promotes wild landscapes, parks, and nature reserves. However, the participants were aware that their perception was not really based on any

tangible data and that these images were mostly intended to sell tourist destinations. Nevertheless, in their view, the fact that Canada is promoting a tourism offer that focuses on experiencing nature means that it is carefully protecting its natural spaces.

This perception of Canada was not shared by all participants. Many felt that Canada is not as virtuous as the image it wants to project. Indeed, some participants mentioned that, in exploiting its natural resources, Canada is far from being a country that protects the environment. They, in fact, considered it a country that attacks nature. The participants noted oil sands, shale gas, mining, and forestry operations to explain this point of view. They saw a country willing to resort to expropriation to exploit its natural resources. The lifestyle of Canadians who drive a four-wheel-drive vehicle was another element in this regard.

Individual freedoms

Some participants mentioned perceiving Canada as a democratic country that protects individual freedoms better than the French government. Some even considered that Canada is probably better managed than France because they could not think of major demonstrations happening there (in Canada). For instance, they mentioned that the French government sometimes limits the right to protest. However, some participants recalled the student demonstrations, prompting them to consider the fact that Canada could also resort to repression during demonstrations.

Opportunities in North America, but...

Many participants said they feel that Canada is a country of opportunities that do not exist in France. Many participants also reported having friends or family members who moved to Canada for education, work, or personal reasons. It is a more accessible version of the American Dream for the French. However, some experiences tarnished this perception of Canada. Indeed, many people said that it is very difficult for the French to qualify, be selected, and settle in Canada. It is also difficult for them to develop social relationships and make friends. Several participants mentioned that they knew people who had returned from Canada disappointed with their experience.

An image that is changing

Canada has consistently been described as the Switzerland of North America, that is, a neutral, peaceful, calm, discreet, and quiet country. A country that has no voice or no significant presence on the international stage. In fact, Canada is often seen as being in the shadow of the United States, on which it depends. Never alone on the international stage, Canada is only there to support or accompany other countries.

However, this image of Canada has been changing in recent years, mainly since Justin Trudeau came to power. Several participants said that Mr. Trudeau has given a new impetus to the country's visibility in France. Since his election as head of government, they said they are hearing about Canada more regularly than in the past.

Justin Trudeau is part of a new generation of leaders, as is Emmanuel Macron, who have been elected in recent years. In the eyes of many, Mr. Trudeau has a positive influence on the image of Canada, and that he is modernizing and reviving the country. For many participants, a Canada led by Justin Trudeau was seen as a champion of democratic values such as tolerance, openness, and freedom. Some participants also noted that Mr. Trudeau did not hesitate to stand up to Donald Trump and distance himself from American positions. In doing so, Trudeau is giving Canada its own unique voice on the world stage.

Canadians in France

Canada's presence in France was mainly felt through its artists, more particularly its singers. A few participants pointed out a plethora of singers from Quebec a few years ago, when musicals were popular. Among the most frequently named artists were Céline Dion, Garou, Roch Voisine, and Lara Fabian. Older participants also remembered Fabienne Thibault and Marcel Béliveau. These Francophone artists have been known for many years in France, where they have left their mark.

The participants also mentioned more recent artists such as directors Xavier Dolan and Denis Villeneuve, as well as Drake, Justin Bieber, and Ryan Reynolds. They also noted that Canada's new stars are now highly Americanized. Others also acknowledged that many English-speaking artists who they believe are American may actually be Canadian artists.

Canada is also represented in France by its comedians. Anthony Kavanagh, Gad Elmaleh, and Rachid Badouri were cited as examples. They are considered young comedians whose approach to humour is very American (i.e. stand-up comic style), but in French. Finally, Dany Laferrière, a member of the Académie Française, was spontaneously mentioned as a Canadian personality.

Canada is also known for its excellence in sports and its appreciation of sports. Although the participants could not name any specific Canadian athletes, they believed that Canada stands out in certain sports: hockey, curling, figure skating, skiing, track and field, and rugby. They felt that Canadians are more respectful than the French when they attend sporting events.

Economic and commercial partner

The majority of the participants believed that Canada is a stable and reliable trading partner. However, the majority of the participants were not certain about the extent of trade relations between the two countries and felt that Canada is a minor trading partner of France. In fact, for some of the participants, Canada was

seen more as a competitor than a potential partner. As an example, they mentioned the competition between Alstom and Bombardier.

The participants' knowledge of trade agreements was very limited. Generally speaking, Canada was perceived as much more liberal than France. In their view, there appears to be less oversight, fewer rules, and fewer standards to ensure the quality of Canadian products. That is why the participants believed that Canada is probably too liberal to be a good trading partner of France. The proximity between Canada and the United States is probably partially responsible for this negative perception of Canada.

Many felt that China is a more important partner than Canada for France, and they did not immediately see the value of a trade partnership with Canada. However, Canada is known for producing better-quality—although much more expensive—products than China. Given the proximity of the European market and the partnerships with other European countries, the relevance of a trade partnership with Canada was not obvious to the participants. For many of them, Canada seemed at first glance too far away to be a good trading partner. The central issue for them came down to what Canada can offer France. They had a strong understanding of the benefits France can offer Canada (e.g. luxury products, wine and spirits, history, industries). On the other hand, without really knowing what Canada can offer France, the participants could only make assumptions. That is why they favoured trade with European countries for proximity, and with China, which has the advantage of producing a wide range of affordable goods.

In considering potential trade opportunities and partnerships between France and Canada that could generate interest among the French, the participants mentioned a number of industrial sectors, including the Canadian petroleum industry, aeronautics, textiles, the film industry (series), technology (in general), and pharmaceuticals. In addition to trade, some participants expressed interest in exchanging culture, knowledge, skills, and labour between the two countries.

Canadian brands and products

Canadian brands and products were not well known. Although all participants were familiar with maple syrup, many had difficulty mentioning other Canadian products or brands available in France. Only a few Canadian brands were mentioned in the focus groups: Bombardier (transport and aeronautics), Canada Goose (textile, clothing), The Ordinary (cosmetics), as well as Air Canada and Air Transat (airlines).

The participants stated that they are not regularly exposed to consumer products from Canada. As one participant pointed out, the French can find Asian speciality product sections in grocery stores, but not sections with North American products. Canadian food products that were mentioned include maple syrup, bison and caribou meat, salmon and lobster, peanut butter, whisky, and soy. There was generally very little interest in Canadian food products because they are associated with American food and junk food.

In addition to the lack of sophistication, a common perception among the participants was that Canada is more lax than France on product and food quality norms and standards. Many believed that France has higher and better standards than Canada to ensure food quality and safety. This negative perception was also linked to the fear arising from the use of GMOs, antibiotics, pesticides, and preservatives in the production of Canadian food products. Very little interest was therefore shown in food products from Canada. The food products that were of most interest were maple syrup, lobster, and salmon.

2.2 General perception of CETA – Focus group results

CETA

The participants had very low basic knowledge of CETA. Most had heard about it in the media on several occasions, but their knowledge was still very superficial. Only a few of the participants said they had done some research on the subject. From the outset, their opinion on CETA was negative. Some of the participants believed that the French population was not adequately informed about the agreement, or even that it was intentionally kept in the dark. They felt that CETA was being negotiated behind closed doors and that the concerns and demands of the French population were not being heard.

Many of the participants questioned the timing of the implementation of CETA. In these difficult economic times for French producers and breeders, the participants were questioning the merits of a Canada-Europe agreement that risks further weakening French producers and breeders. It should be noted that the negative perception the participants had of CETA was primarily the result of media campaigns by French producers and breeders they had seen.

The concern and opposition CETA raised revolve around three main topics: the environment, American liberalism, and the loss of governmental and civil power.

Environment

CETA was perceived to be incompatible with the environmental values cherished by several of the participants and the need to protect the environment and fight climate change. For some of the participants, the idea of partnering with Canada to import Canadian consumer products into France seemed at odds with environmental responsibilities. Indeed, it was difficult for them to understand the reasons for importing products from Canada when such products can already be found in France or in neighbouring European countries.

American liberalism

Being part of North America means that Canada is associated with the United States and with economic liberalism. This perception led to great concern for several of the participants that this could make it possible for Canada to export lower quality food products to France. In this regard, they pointed out that Canada's norms and standards of quality are far below what France imposes on its own producers and breeders. There was therefore concern that Canada could import large quantities of low-quality, low-priced products into France. There was also a fear that American products could go through Canada and end up in France.

In the participants' view, American liberalism allows Canadian and American producers to use manufacturing methods that they found unacceptable. Strong images that cause a great deal of fear, such as bleach-washed chicken meat, the presence of GMOs in ultra-processed products, the presence of hormones and antibiotics, and the use of pesticides, were some of the concerns mentioned by many of the participants in all the groups. Since CETA would lift tariffs on several Canadian food products, some of the participants felt that the French would no longer be adequately protected against GMOs, hormones, antibiotics, and pesticides. The concern expressed by the participants was that they would not be able to trace food and identify Canadian products among French products on the shelves of grocery stores.

Loss of governmental and civil power

The participants were concerned that this agreement would weaken the scope of French laws. Some of the participants believed that CETA would give more power to large corporations than to signatory states. They feared that France would no longer be able to enforce its laws, standards, and regulations on its own territory. France would thus be forced to accept products that do not meet the French standards it imposes on its producers, who risk penalization. Some also believed that, in the event of litigation, disputes would be resolved by ad hoc tribunals and hearings that would not be public. CETA raised the participants' concerns that France would lose some of its ability to impose its standards and laws on companies and multinationals which, in turn, would have the power to impose their own methods. CETA was therefore perceived as a risk that France and civil society would lose power to companies.

Few benefits perceived for France under CETA

Many participants felt strongly that CETA would be negative for France. They believed it would be far from a win-win agreement and that France would lose under it. The participants easily saw the benefits that Canada could gain from this trade agreement. However, they could not readily see the benefits France could reap. For many of them, France has more to offer Canada than Canada has to offer France. They wanted to know what France would stand to gain by joining CETA.

Agri-food: the main obstacle to CETA

The agri-food dimension of CETA monopolized much of the discussion in all focus groups. For the participants, it was this aspect of the agreement that was the most controversial as well as the main obstacle to supporting the agreement. Several participants mentioned that if CETA did not include an agri-food component, they would have no objection to France ratifying it. The majority of the participants would be against France ratifying CETA in its current form. Some of the participants pointed out that imposing strict conditions on food imports from Canada (e.g. no GMOs, no pesticides, no synthetic products) would reduce their reluctance. Adding these types of conditions would allow the participants to be more comfortable with CETA. However, given that they felt CETA currently opens the doors of the European market to Canadian food products without control or conditions, they were strongly opposed to the agreement.

Apart from agri-food, there is little reluctance

Opposition to CETA was centred on the agri-food part of the agreement. The other aspects of the Canada-Europe trade agreement did not raise any issue or strong opposition from the participants. Indeed, labour-force mobility, investment, and simplifying procedures for obtaining a temporary work permit were generally well received by the participants. The participants even found these aspects of CETA advantageous, such as boosting the relationship between the two countries, increasing competition between companies (thus lowering prices for the benefit of consumers), and allowing the discovery of Canadian brands and products. Some of the participants also mentioned that, in a global context where several markets are closing down, as in the United States, offering new opportunities for French products would be a chance not to be missed.

Appendix A – Detailed Research Methodology

To achieve the objectives of the study, a research plan based on a hybrid method—qualitative and quantitative—was developed. First, focus groups (qualitative methodology) were held with Parisians and Lyonnais. A telephone survey (quantitative methodology) of the general population of France was later conducted. Both methodologies were used to explore and assess the perceptions and images associated with Canada and Canadians in France, as well as knowledge and opinions about CETA.

This report is only about the qualitative portion of the study. For more information on the quantitative portion of the study, please refer to the report “The Image of Canada and CETA by the General French Population: A Quantitative Research.”

Qualitative methodology

Leger organized a series of four focus groups in France with participants from the general population. Two groups were conducted in the greater Paris area, and two other groups were organized in Lyon to obtain the views of the population living outside the French capital.

Leger was responsible for coordinating the recruitment activities and holding focus groups through BVA, a professional research firm in France. Leger produced the recruitment and discussion guides in collaboration with Global Affairs Canada. BVA was responsible for recruiting the participants, booking professional focus group rooms in both cities, and providing professional French facilitators for each group. The facilitation was conducted by French professionals to avoid any possible bias that could have been introduced by Canadian facilitators, as the discussion content was the perception of Canada.

In order to participate in the groups, participants had to be 18 years of age or older and have some knowledge of Canada. Those who said they did not know anything about Canada or had nothing to say about Canada were excluded during recruitment. The focus groups were conducted in French, and each session lasted two hours. Based on BVA’s professional advice, a group of young people under 40 years of age and a group of people 40 years of age and over were recruited in each city.

All focus group participants received an honorarium of €60 for their participation in the discussion. The person responsible for recruitment informed the participants of all their rights under the *Privacy Act* and the standards for public opinion research conducted by the Government of Canada. More specifically, their privacy was guaranteed, and their participation was considered voluntary.

Locations and dates

The focus groups were organized in the following cities on the dates indicated.

Table A1. Recruitment details

City	Recruited	Participants	Target population	Time	Language	Date
Paris	10	9	18 to 39 y.o.	3:00 p.m.	FR	February 12
Paris	10	10	40+ y.o.	7:00 p.m.	FR	February 12
Lyon	10	9	40+ y.o.	3:00 p.m.	FR	February 13
Lyon	10	10	18 to 39 y.o.	6:00 p.m.	FR	February 13
Total	40	37				

The recruitment guide and the discussion guide used for this portion of the study are presented in the Appendix to this report.

Note regarding the limitations of qualitative research

Qualitative research allows for a better understanding of opinions within a population rather than measuring opinions as a percentage, as is the case with a quantitative study. The results of this type of research should be considered purely indicative. No conclusions about the general population can be inferred from the results of this type of research.

Appendix B – Recruitment Guides

RECRUITMENT GUIDE

INTRODUCTION

Hello,

My name is _____ from the BVA research firm. We are organizing a research project for the Government of Canada. This project focuses on various current topics. You don't need to be an expert to participate.

We are preparing a series of discussions with people like you. During these discussions, participants will be asked to share their opinions and ideas with the other people of the group. We are currently organizing these groups and would be interested in having you as a participant.

Your participation is entirely voluntary, and all the information you provide is completely confidential. The full names of participants will not be provided to anyone. A €60 compensation will be given to participants for the time they take to attend the focus groups and to cover travel expenses. May I continue?

Label	Value	
Yes	1	
No	2	TERMINATE

The focus groups we are organizing will last a maximum of 2 hours each.

The discussions would take place in:

PARIS	BVA Factory – 56 Rue Marcel Dassault 92100 Boulogne-Billancourt	Tuesday, February 12, 2019	G1: 3 p.m. to 5p.m. G2: 7 p.m. to 9 p.m.
LYON	MARKETING ESPACE - 57 Place de la République 69002 LYON	Wednesday, February 13, 2019	G3: 3 p.m. to 5p.m. G4: 6 p.m. to 8 p.m.

I would now like to ask you a few questions to see if you are eligible to participate in this study.

Note to recruiters: Terminate as soon as a respondent refuses to answer a question.

When you finish, say: *Thank you for your cooperation. We have already reached the number of participants with a profile similar to yours. We are therefore unable to have you participate.*

GENDER

[ENSURE A GOOD GENDER MIX IN GROUPS]

Indicate the respondent's gender by observation

Label	Value	
... Man	1	
... Woman	2	

AGE

[IN EVERY CITY: ONE GROUP OF 25–40 YEARS OLD and ONE GROUP OF 41–60 YEARS OLD – ENSURING A GOOD MIX OF AGE IN GROUPS]

We would like to talk to people of different age groups. Which of these groups do you belong to?

Label	Value	
Under 18 years old	0	TERMINATE
Between 18 and 24 years old	1	TERMINATE
Between 25 and 34 years old	2	
Between 35 and 40 years old	3	
Between 41 and 45 years old	4	
Between 46 and 50 years old	5	
Between 51 and 60 years old	6	
Over 60 years old	7	TERMINATE

ELIG

[IF YES TO ANY OF THE FOLLOWING CATEGORIES – EXCLUDE THE PARTICIPANT]

Do you or someone in your household work in one of the following types of businesses or organizations?

CATEGORIES		
A market research company	1	
A magazine or newspaper	2	
An advertising agency or graphic design firm	3	
A political party	4	
A radio or television station	5	
A public relations company	6	
Federal or provincial government	7	

HOUSEHOLD

[ENSURE A GOOD PROFILE MIX WITH AND WITHOUT CHILDREN IN GROUPS]

Including yourself, how many people (adults and children) live in your household?

___ people

Label	Value	
Only one (myself)	1	

IF MORE THAN 1 PERSON AT FOY1

Of these ('FOY1') people in your household, how many are children under 18 years of age?

___ children

Label	Value	
No children under 18 years of age	0	

STATUS

Are you?

Label	Value	
Single	1	
Married	2	
Living in a civil union or common law relationship	3	
Divorced	4	
Widowed	5	
(DO NOT READ) I prefer not to answer	9	

EMPLOYMENT

[ENSURE A GOOD MIX OF JOB PROFILES IN GROUPS]

What is your current employment situation?

Label	Value	
Full-time employee	1	
Part-time employee	2	
Self-employed	3	
Student	4	
Homemaker	5	
Unemployed	6	
Retired	7	
(DO NOT READ) I prefer not to answer	9	

IF MARRIED OR IN A CIVIL UNION AT STATUS, ASK THE FOLLOWING QUESTION

EMPLOYMENT – SPOUSE

And what is your spouse's current employment situation?

Label	Value	
Full-time employee	1	

Part-time employee	2	
Self-employed	3	
Student	4	
Homemaker	5	
Unemployed	6	
Retired	7	
(DO NOT READ) I prefer not to answer	9	

EDUCATION

[ENSURE A GOOD PROFILE MIX IN GROUPS]

What is your level of education? Which stream?

Label	Value	
No diploma	1	
Certificate of vocational proficiency/Certificate of professional competence	2	
Baccalauréat	3	
Bac+1/Bac+2	4	
Bac+3	5	
Bac+4 (Master)	6	
Bac+5 and higher	7	
Master's degree	8	
Engineering degree	9	
Ph.D.	10	

INCOME

Today, what range does your household's monthly NET income fall into?

Label	Value	
Between 0 and 2,499 euros per month	1	
Between 2 500 and 3,499 euros per month	2	
Between 3,500 and 4,499 euros per month	3	
Between 4,500 and 6,000 euros per month	4	
More than 6,000 euros per month	5	

PREVIOUS PARTICIPATION

Have you ever participated in a focus group discussion for which you received compensation?

Label	Value	
Yes	1	
No	2	

IF YES

When was the last time you participated in a focus group?

Label	Value	
6 months ago or less	1	TERMINATE
More than 6 months ago	2	

CANADA

[MAKE SURE PARTICIPANTS ARE ABLE TO AT LEAST MINIMALLY DISCUSS CANADA AND AVOID PEOPLE WHO HAVE NO OPINION AND WHO ARE NOT ABLE TO DISCUSS – MIXED SENSITIVITY LEVELS]

Our study will focus mainly on a country and the image you have of it.

I will mention a few countries; in a few words, could you tell me how you view each of these countries?

[Interviewer – Probe further. Recruit people who have at least some minimal knowledge of Canada = Are able to talk about it]

Have you ever visited this country?

IF YES What motivated you to visit it?

IF NO Would you visit it? For what reasons?

Quote	NOTE – Probe further	VISIT
China		
Germany		
Canada		
Brazil		

Confidentiality issues:

I would now like to ask you a few questions related to confidentiality, your personal information, and how the research will be conducted. We will need your permission on certain matters to conduct our research. When we come to these questions, feel free to ask for clarification if needed.

P1) First, we will provide a list of the participants' names and profiles (questionnaire responses) to the hosts and facilitator so that they can sign you up. Do you agree to us providing them this information? I can assure you that this information will remain strictly confidential.

Yes 1 **SKIP TO P2**

No 2 **READ THE FOLLOWING INFORMATION TO THE RESPONDENT**

Unfortunately, we must give your name and profile to the focus group hosts and facilitator, since only those who are invited to participate can take part in the session. The hosts and facilitator need this information for verification purposes only. Rest assured that this information will remain strictly confidential. **GO TO P1A**

P1a) Now that this has been explained, do you agree to us giving your name and profile to the discussion group hosts and facilitator?

Yes 1 **SKIP TO P2**

No 2 **THANK AND TERMINATE**

P2) There will be an audiovisual recording of the session, and it will only be used for research purposes. The recordings will only be used **by the research team** to prepare the report on the research results.

Do you agree to having an audiovisual recording of the session be made?

Yes 1 **THANK AND GO TO P3**

No 2 **READ THE FOLLOWING INFORMATION TO THE RESPONDENT**

Unfortunately, an audiovisual recording of the session is required for the research professional to write his report. **GO TO P2A**

P2a) Now that this has been explained, do you agree to us making an audiovisual recording of the session?

Yes 1 **THANK AND GO TO INVITATION**

No 2 **THANK AND TERMINATE**

INVITATION SECTION

GROUP	Place	Profile	Language	Participants	Dates	Time of day	Type	Address
GR01	PARIS	41-60 years old	FR	8-10	February 12	3 p.m. to 5p.m.	In person	BVA Factory – 56 Rue Marcel Dassault
GR02	PARIS	25-40 years old	FR	8-10	February 12	7 p.m. to 9 p.m.	In person	92100 Boulogne- Billancourt
GR03	LYON	25-40 years old	FR	8-10	February 13	3 p.m. to 5p.m.	In person	MARKETING ESPACE
GR04	LYON	41-60 years old	FR	8-10	February 13	6 p.m. to 8 p.m.	In person	57 Place de la République 69002 LYON

Description of the groups

- Groups 1 & 2
- General population of **Paris** with a good mix of men and women of different ages, education levels, and professions.
- All Francophones
- Groups 3 & 4
- General population of **Lyon** with a good mix of men and women of different ages, education levels, and professions.
- All Francophones

Someone from our company will contact you to confirm the group meeting. Could you leave me a phone number where we can reach you in the evening and during the day?

Name: _____

Telephone in the evening: _____ Telephone at work: _____

Thank you very much!

Recruited by: _____

Confirmed by: _____

As we only invite a small number of people to participate, your participation is very important to us. We would like to remind you that a compensation of €60 will be given to you for your participation. If, for any reason, you are unable to participate, please notify us so we can find someone to replace you. You can reach us at our office at _____. Please ask for _____.

Annexe C – Discussion Guide

INTRODUCTION

PRESENTATION

- Welcome to participants
- Introduction of moderator
- Presentation of BVA

PURPOSE OF THE MEETING

- The Canadian government commissioned BVA to conduct a study on the French's perception of Canada. Various themes related to this topic will be discussed in this group today.

RULES OF DISCUSSION

- Briefly explain the dynamics of the discussion (duration, discussion, roundtable)
- There are no right or wrong answers.
- Importance of giving your spontaneous and honest personal opinions
- Importance of reacting to others' opinions
- Importance of taking turns to speak and respecting others' opinions

PRESENTATION OF THE FOCUS GROUP ROOM

- Audio/video recording for subsequent analysis
- Presence of observers behind the mirror
- Information is only gathered for the purposes of this study and will not be used for other purposes.

CONFIDENTIAL RESULTS

- Today's discussions will remain confidential.
- The audio/video recording will not be shared with other people.
- Your name will not appear in the report.

Do you have any questions before we begin?

INTRODUCTION OF PARTICIPANTS (GO AROUND THE TABLE)

- First name only
- Occupation (what they do for a living)
- Service and/or department
- Hobbies

Warm-up

Questionnaire #1 – INDICATE THE WORDS THAT COME TO MIND WHEN YOU THINK ABOUT CANADA

Let's start with a very general discussion about Canada.

1.1 In this short questionnaire, what are the words you wrote that directly come to mind when you think about Canada?

Note the words on a board.

PROBE: What made you think of this/these words?

Go around the table to identify all of the ideas that readily come to the participants' minds.

IDENTIFY whether there are spontaneous references to the classic image and clichés associated with Canada (cold, wide open space, wild land, Natives/indigenous, Canadian cottage/cabin, etc.)

If so, probe further: These are traditional images and ideas associated with Canada. Is there anything else you know about Canada?

1.2 What other things do you know about Canada?

Conduct a roundtable on knowledge about Canada.

TRY TO STEER PARTICIPANTS AWAY FROM CLICHÉS ASSOCIATED WITH CANADA AS MUCH AS POSSIBLE.

CANADA'S REPUTATION AND IMAGE

1.3 In your view, what reputation does Canada have? Why? What is your basis for saying that? Do you have any specific examples to support your statements?

1.4 Is Canada different from other countries you know? What aspects distinguish Canada from other countries in a positive way? What aspects distinguish Canada from other countries in a negative way?

1.5 From a French point of view, would you say that Canada's image has changed positively or negatively in recent years? Has it remained stable/the same? Why do you say that? Do you have any specific examples to support your statements?

CANADIAN VALUES

Questionnaire #2 – IF CANADA WERE A PERSON, WHAT WOULD ITS LIFESTYLE AND VALUES BE?

Go around the table to identify the Canadian attributes that spontaneously come to the participants' minds. Note the values on a chart.

PROBE: What made you think of these values?

IDENTIFY whether there are spontaneous references to Canadian values, such as multiculturalism, multilateralism, democracy, tolerance, openness to diversity and the world, equality, and economic liberalism.

IF PRESENCE OF CANADIAN VALUES: Do you have examples that support your view of Canada? Why did you mention this value in particular?

GENERAL PROBING: Of all the values mentioned by the participants, which do you think best define Canada and Canadians?

Is there a Canadian "model"? How is it different from the French "model"? How is it different from the American "model"?

CANADIAN CULTURE

Now let's talk about culture.

Is Canada a country you know well? Is Canada well known on the French/international scene? How does it make itself known?

Who are the major Canadian personalities known in France and elsewhere?

How do these personalities shape Canada's image in France and elsewhere in the world?
Is it positive or negative?

TRADE

Do you think a special relationship exists between Canada and France? How do you define or perceive the relationship between the two countries?

And how about the economic relations between the two countries? Are the two countries economic partners? In your opinion, what type of commercial partner is Canada? Is it reliable? Stable? Credible? Is it a trustworthy partner?

And compared to other European countries, how do you view Canada? Is it a better partner than other European countries or not? Why? And compared to the United States? Compared to Asian countries? China?

In your opinion, is there a lot of trade between France and Canada? Is that a good thing? Should there be more or less? In what sector in particular?

Food products

Do you often see Canadian products in France? And how about Canadian food products? Are there too many or not enough? Are the products easily accessible in France? Have you ever bought any (food products from Canada)? What do you think of the quality of food products produced by Canada? Why do you say that?

Would you trust Canadian food products? Would you buy Canadian food products (dairy products, meat, or vegetables)? Why or why not?

Environment

What is your perception of Canada with regard to protection of the environment? Is the country doing well on this front or not? Why do you say that? In your opinion, is Canada doing better or worse than other countries with regard to environmental protection? Better than what country? Worse than what country? And compared to France? Compared to other European countries?

ACCORDING TO THE GROUP'S KNOWLEDGE LEVEL: Do you believe that Canada makes enough effort with regard to environmental protection or not? What makes you say that? Is it more or less than other countries? If not, should it do more?

NOTE TO THE FACILITATOR

If there are negative perceptions or opinions concerning oil produced in Canada, prompt: And considering other oil-producing countries you know (the United States, Russia, Saudi Arabia, Norway, Venezuela), what is Canada's reputation for environmental protection compared to these countries?

CETA

Have you heard of the Comprehensive Economic and Trade Agreement (known as the CETA) or the *Accord économique et commercial global* (AECG)? What do you know about this agreement?

IF UNKNOWN, INTRODUCE SOME INFORMATION.

POINTS OF INFORMATION FOR THE FACILITATOR – TO BE USED AS NEEDED

It is an economic and trade agreement between Canada and the European Union.

The agreement concerns the trading of goods, services, investments and labour.

- 1- It abolishes tariffs on nearly all products traded between Canada and France (except for certain agricultural products, such as chicken and eggs).**
- 2- It facilitates temporary work abroad (allows certain categories of professionals to work 1 or 2 years in Canada).**
- 3- The agreement protects French AOPs and AOCs in Canada (on wine, spirits, and certain food products).**

4- The agreement also guarantees all signatory countries the freedom to legislate in matters of justice, health, environment, and culture.

In your opinion, is this a good thing or not? Do you think France needs this agreement? How about the rest of Europe? And Canada?

Have you heard positive comments regarding this agreement? What? What do you think about this?

Have you heard criticism or negative comments regarding this free trade agreement? What? What do you think about this?

NOTE TO THE FACILITATOR

If participants engage in a very negative discussion regarding the agreement, prompt with questions along these lines:

- 1- One year after the implementation of this agreement, French exports to Canada increased by 10%. Is that positive? Does that change your opinion about this agreement?**

This agreement is currently in provisional application only. Do you think France should go ahead and ratify this free trade agreement? Why or why not?

Who (or which group) is in favour of this agreement in France? Why are they in favour of this agreement?

Who (or which group) is against this agreement in France? Why are they against it?

CONCLUSION

Now that we have discussed different topics about Canada, I would like to do a little role playing to conclude this focus session.

Now imagine that you are a special consultant hired by the Canadian embassy. You must help the embassy present Canada in France. What advice would you give the embassy to present Canada effectively to...

- ... French workers?
- ... French investors?
- ... students?
- ... artists? (discuss)

Do have any other comments you would like to make before we end this discussion?

Thank participants and end the group.