



Immigration, Refugees
and Citizenship Canada

Immigration, Réfugiés
et Citoyenneté Canada

2020-21 Mobilité Francophone Employer Study

Final Report

Prepared for Immigration, Refugees and Citizenship Canada

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Ce rapport est aussi disponible en français.

Canada

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This public opinion research report presents the results of an online survey conducted by Léger Marketing Inc. on behalf of Immigration, Refugees and Citizenship Canada. The research was conducted with 500 individuals responsible for hiring within their organization from February 24 to March 19, 2021.

Ce rapport est aussi disponible en français: **2020-21 étude d'employeur mobilité francophone**

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Table of Contents

1. Summary	4
1.1 Background and objectives	4
1.2 Methodology – Quantitative research	5
1.3 Overview of quantitative findings	6
1.4 Notes on interpretation of research findings	7
1.5 Political neutrality statement and contact information	8
2. Detailed findings	9
Appendix A – Detailed Research Methodology	32
Appendix B – Quantitative Instrument	37

1. Summary

Léger is pleased to present Immigration, Refugees and Citizenship Canada (IRCC) with this report containing the findings of a quantitative survey to learn more about the Mobilité Francophone program.

This report was prepared by Léger who was contracted by Immigration, Refugees and Citizenship Canada (contract number B8815-210160/001/CY awarded February 15, 2021).

1.1 Background and objectives

Since June 1, 2016, the Mobilité Francophone (MF) stream of the International Mobility Program has ensured that foreign nationals bound for a province or territory outside Quebec who are qualified under National Occupational Classification (NOC) 0, A or B may be eligible for an exemption from the Labour Market Impact Assessment (LMIA) requirement under paragraph 205(a) of the Immigration and Refugee Protection Regulations (IRPR). Most often, when foreign workers come to work in Canada, their potential employers must file an LMIA and pay the associated costs. In addition, not all potential employees are eligible for an LMIA. As a result, Canadian employers are encouraged to participate in the MF stream.

This system was created to promote Francophone immigration outside Quebec and to support the revitalization of Francophone minority communities. For example, when approving a temporary work permit, officers must be satisfied that the foreign national's usual language of daily use is French; however, the language of work does not have to be French.

In this context, Immigration, Refugees and Citizenship Canada (IRCC) is seeking detailed information on the results of Mobilité Francophone in order to improve its use by applicants and employers: this research could help increase the number of admissions of French-speaking temporary foreign workers outside Quebec. Given that a large proportion of permanent residents are drawn from the temporary resident population, it is hoped that a higher number of French-speaking temporary residents will ultimately contribute to a higher number of French-speaking permanent residents, thereby helping IRCC meet its target of 4.4% Francophone immigration outside Quebec.

The main objectives of the research were to:

- Assess the use of Mobilité Francophone (including geographic and sectoral considerations) among employers in Canada.
- Measure the awareness, familiarity and interest of employers who do and do not participate in the program.

The results of the research study will provide a better understanding of how employers perceive the Mobilité Francophone stream of the International Mobility Program across Canada, outside of Quebec. The total contract value for this study is **\$45,304.53**, including HST.

1.2 Methodology – Quantitative research

Telephone Survey

This research was conducted through telephone surveys, using computer-assisted telephone interview (CATI) technology. Data collection for the survey was conducted from February 24 to March 19, 2021. A total of 500 people responsible for hiring in their organization were interviewed.

A pre-test of 20 interviews was conducted prior to the launch of data collection to validate the programming of the questionnaire.

The national margin of error for this survey is +/- 4.38%, 19 times out of 20.

Léger adheres to the most stringent guidelines for quantitative research. The survey instrument followed the Standards for the Conduct of Government of Canada Public Opinion Research.

A full methodological description is provided in the Appendix to this document (see Appendix A).

Note to Readers

The cross-tabulations in this report present the detailed responses obtained for the survey questions.

Results for all respondents are presented in the “Total” column, followed by results by sub-group (e.g., by gender, age, etc.). The numbers in **red** (with a - symbol) and **green** (with a + symbol) indicate respectively lower or higher scores that are considered statistically significant compared to the results for other respondents. For two proportions or two averages to be significantly different, statistical tests must confirm the difference.

In the following example, it can be seen that a total of 37% of respondents have already hired employees who are temporary residents of Canada. Respondents who live in British Columbia or the Territories (49%) are more likely to have hired employees who are temporary residents of Canada. There are also important differences depending on the size of the respondent's company. Respondents working for a large organization are more likely to have hired employees who are temporary residents of Canada (78%), while respondents working for a small business are less likely to have done so (69%).

Table: Hiring of employees who are temporary residents of Canada by region

Q2: Have you ever hired employees who are temporary residents of Canada?

Base: All respondents

	Total (n=500)	British Columbia + Territories (n=77)	Alberta (n=91)	Prairies (MB, SK) (n=46)	Ontario (n=245)	Atlantic (n=41)
Yes	37%	49%+	30%	35%	35%	36%
No	59%	48%-	67%	61%	60%	60%
I don't know	4%	3%	3%	4%	5%	4%

Table: Hiring of employees who are temporary residents of Canada by business size

Q2: Have you ever hired employees who are temporary residents of Canada?

Base: All respondents

	Total (n=500)	Fewer than 10 employees (n=85)	10 to 199 employees (n=328)	200 or more employees (n=80)
Yes	37%	31%	39%	78%+
No	59%	69%+	56%-	20%-
I don't know	4%	0%-	5%+	2%

1.3 Overview of quantitative findings

- In general, nearly three out of 10 respondents say that no French-speaking or bilingual employees have been hired in their organization. The data collected show that an average of three French-speaking or bilingual employees have been hired among organizations that have hired in the last five years.
- More than half of the respondents say they have never hired employees who are temporary residents of Canada. The majority of respondents also say they had never hired employees from outside Canada.
- Of those respondents who have hired temporary residents of Canada or employees from outside Canada, few say they have ever hired French-speaking or bilingual employees from outside Canada.
- In general, the majority of respondents had not heard of the Mobilité Francophone stream of the International Mobility Program. Three-quarters of

- respondents who said they were familiar with the Mobilité Francophone stream felt that they were not very familiar with it or that they only knew the name.
- Almost all respondents who had heard of the Mobilité Francophone stream had never used it. In terms of interest in the program, three out of 10 respondents who had never heard of or used the Mobilité Francophone stream indicated that they were interested.
 - Direct email stands out as the most popular means of obtaining information for respondents interested in the Mobilité Francophone stream, followed by the IRCC website, webinars and an IRCC newsletter or other source.
 - The reasons for using the Mobilité Francophone stream most often cited by respondents who are interested in using the program are: to reach qualified/competent candidates; because the organization where they work is recruiting; to reach French-speaking or bilingual candidates; or during a labour shortage.
 - The reasons for not using the Mobilité Francophone stream most often cited by respondents who are not interested in the program are: because they work for an organization that hires only Anglophones or that does not need Francophones; because they prefer to hire local candidates; or because the organization uses other means of recruitment.
 - Respondents with an interest in the Mobilité Francophone stream and those who have already used it suggest that providing access to more information, education and advertisements would facilitate the use of the program.
 - The Indeed platform, websites or online bulletin boards and word of mouth are the resources used by the most respondents to recruit employees.

1.4 Notes on interpretation of research findings

The views and observations expressed in this document do not reflect those of Immigration, Refugees and Citizenship Canada. This report was compiled by Léger based on the research conducted specifically for this project.

1.5 Political neutrality statement and contact information

Léger certifies that the results delivered fully comply with the Government of Canada's requirements for political neutrality as outlined in the *Communications Policy of the Government of Canada* and the *Directive on the Management of Communications*.

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



Signed: _____

Christian Bourque, Principal Investigator
Léger

2. Detailed findings

In general, nearly three in 10 respondents say that no French-speaking or bilingual employees have been hired in their organization (28%). Two out of five respondents say that their organization has hired between 1 and 5 French-speaking or bilingual employees over the past five years (40%), while 12% of respondents say that their organization has hired 6 or more bilingual or Francophone employees over the past five years. According to the data collected, an average of three French-speaking or bilingual employees were hired per organization.

Table: Number of French-speaking or bilingual employees hired in the last five years

Q1: To the best of your knowledge, how many times has your organization hired French-speaking or bilingual (speaking English and French) employees in the past five years? Please provide your best estimate

Base: All respondents

	Total (n=500)
None	28%
1	13%
2	11%
3	7%
4	3%
5	6%
6 to 20	10%
Over 20	2%
I don't know	19%

Significantly more Ontario respondents than those in other regions work in an organization that has not hired any French-speaking or bilingual employees in the past five years (34%). Respondents from the Atlantic provinces are significantly more likely to work for an organization that has hired four French-speaking or bilingual employees in the past five years (15%).

Surveyed executives working in small businesses (fewer than 10 employees) are significantly more likely to say that their organization has not hired any French-speaking or bilingual employees in the past five years (51%). Conversely, executives surveyed who work for a large business (more than 200 employees) are statistically more likely to say that their organization has hired more than 20 French-speaking or bilingual employees (17%) over the past five years. A significantly higher proportion of executives surveyed working in medium-sized businesses said that their organization had hired between 6 and 20 French-speaking or bilingual employees in the past five years (12%).

Table: Number of French-speaking or bilingual employees hired in the last five years by region

Q1: To the best of your knowledge, how many times has your organization hired French-speaking or bilingual (speaking English and French) employees in the past five years?

Base: All respondents

	Total (n=500)	British Columbia + Territories (n=77)	Alberta (n=91)	Prairies (MB, SK) (n=46)	Ontario (n=245)	Atlantic (n=41)
None	28%	25%	21%	34%	34%+	14%-
1	13%	9%	18%	15%	13%	9%
2	11%	15%	10%	0%-	13%	5%
3	7%	10%	3%	7%	8%	9%
4	3%	4%	2%	6%	2%	15%+
5	6%	8%	3%	3%	6%	13%
6 to 20	10%	6%	8%	15%	11%	11%
Over 20	2%	1%	4%	0%	2%	0%
I don't know	19%	22%	30%+	20%	13%-	24%
Average	3.4	2.5	4.9	2.8	3.4	3.6

Table: Number of French-speaking or bilingual employees hired in the last five years by business size

Q1: To the best of your knowledge, how many times has your organization hired French-speaking or bilingual (speaking English and French) employees in the past five years?

Base: All respondents

	Total (n=500)	Fewer than 10 employees (n=85)	10 to 199 employees (n=328)	200 and plus employees (n=80)
None	28%	51%+	21%-	11%-
1	13%	12%	14%	3%-
2	11%	8%	13%	5%
3	7%	2%-	9%+	1%-
4	3%	2%	4%	2%
5	6%	3%	7%	9%
6 to 20	10%	4%-	12%+	15%
Over 20	2%	1%	2%	17%+
I don't know	19%	17%	19%	37%+
Average	3.4	1.9-	3.8	21.2+

More than half of respondents say they have never hired employees who are temporary residents of Canada (59%). Just over a third said the opposite (37%), while 4% of respondents were unable to answer.

Table: Hiring of temporary Canadian residents

Q2: Have you ever hired employees who are temporary residents of Canada?

Base: All respondents

	Total (n=500)
Yes	37%
No	59%
I don't know	4%

Respondents from British Columbia or the Territories are significantly more likely to work for an organization that has hired employees who are temporary residents of Canada (49%). The same conclusion can be drawn from the executives surveyed working in a large business (78%).

Table: Hiring of employees who are temporary residents of Canada by region

Q2: Have you ever hired employees who are temporary residents of Canada?

Base: All respondents

	Total (n=500)	British Columbia + Territories (n=77)	Alberta (n=91)	Prairies (MB, SK) (n=42)	Ontario (n=245)	Atlantic (n=41)
Yes	37%	49%+	30%	35%	35%	36%
No	59%	48%-	67%	61%	60%	60%
I don't know	4%	3%	3%	4%	5%	4%

Table: Hiring of employees who are temporary residents of Canada by business size

Q2: Have you ever hired employees who are temporary residents of Canada?

Base: All respondents

	Total (n=500)	Fewer than 10 employees (n=85)	10 to 199 employees (n=328)	200 or more employees (n=80)
Yes	37%	31%	39%	78%+
No	59%	69%+	56%-	20%-
I don't know	4%	0%-	5%+	2%

The majority of respondents say they have never hired employees from outside of Canada (85%), while only 13% say they have.

Table: Hiring employees from outside of Canada

Q3: Have you ever hired employees from outside of Canada—this is to say, foreign nationals who were not already living in Canada?

Base: All respondents

	Total (n=500)
Yes	13%
No	85%
I don't know	2%

People from British Columbia or the Territories are significantly more likely to say they have hired foreign national employees who were not already living in Canada (29%). Conversely, significantly more Ontarians have never hired an employee from outside of Canada (89%).

A significantly higher proportion of executives surveyed who work in medium-sized (15%) or large businesses (25%) have hired employees from outside of Canada. Conversely, a significantly higher proportion of executives surveyed working for small businesses (93%) have never hired an employee from outside of Canada.

Table: Hiring of employees from outside of Canada by region

Q3: Have you ever hired employees from outside of Canada—this is to say, foreign nationals who were not already living in Canada?

Base: All respondents

	Total (n=500)	British Columbia + Territories (n=77)	Alberta (n=91)	Prairies (MB, SK) (n=46)	Ontario (n=245)	Atlantic (n=41)
Yes	13%	26%+	15%	9%	8%-	12%
No	85%	74%-	83%	90%	89%+	86%
I don't know	2%	0%	2%	1%	3%	2%

Table: Hiring of employees from outside of Canada by business size

Q3: Have you ever hired employees from outside of Canada—this is to say, foreign nationals who were not already living in Canada?

Base: All respondents

	Total (n=500)	Fewer than 10 employees (n=85)	10 to 199 employees (n=328)	200 or more employees (n=80)
Yes	13%	7%-	15%+	25%+
No	85%	93%+	83%-	70%-
I don't know	2%	0%	2%	5%

The majority of respondents who have hired temporary residents of Canada or employees from outside of Canada have not hired French-speaking or bilingual employees from outside of Canada (84%). Only 12% of these respondents said they had ever hired French-speaking or bilingual employees from outside of Canada, and 5% could not recall.

Table: Hiring of French-speaking or bilingual employees from outside of Canada

Q4: Have you ever hired a French-speaking or bilingual (speaking English and French) worker who was a temporary resident of Canada or who was a foreign national not already living in Canada?

Base: Respondents who have ever hired temporary residents of Canada or ever hired employees from outside of Canada

	Total (n=246)
Yes	12%
No	84%
I don't know	5%

It is statistically more likely that executives surveyed who have already hired temporary residents of Canada or employees from outside of Canada and who work in a large organization (200 employees or more) have already hired one or more French-speaking or bilingual employees from outside of Canada (25%).

Table: Hiring of French-speaking or bilingual employees from outside of Canada by business size

Q4: Have you ever hired a French-speaking or bilingual (speaking English and French) worker who was a temporary resident of Canada or who was a foreign national not already living in Canada?

Base: Respondents who have ever hired temporary residents of Canada or ever hired employees from outside of Canada

	Total (n=246)	Fewer than 10 employees (n=27*)	10 to 199 employees (n=153)	200 or more employees (n=64)
Yes	12%	7%	12%	25%+
No	84%	93%	82%	52%-
I don't know	5%	0%	6%	23%+

* As n < 30, the data are presented for information purposes only

In general, the majority of respondents had not heard of the Mobilité Francophone stream of the International Mobility Program (82%). Nearly two in 10 respondents had heard of it (17%), while 1% did not recall having heard of it.

Table: Knowledge of the Mobilité Francophone program

Q5: In most cases, before a business can hire a foreign worker, they apply for and receive a Labour Market Impact Assessment (LMIA) showing there is a need for a foreign worker to fill the job. The Mobilité Francophone (MF) stream of the International Mobility Program allows employers outside of Quebec to hire French-speaking or bilingual (speaking English and French) foreign nationals without the need to obtain a Labour Market Impact Assessment. Have you heard of this program?

Base: All respondents

	Total (n=500)
Yes	17%
No	82%
I don't know	1%

Statistically speaking, an Alberta respondent is more likely to have heard of the International Mobility Program and its Mobilité Francophone stream (31%). In contrast, an Ontario respondent is statistically more likely to have never heard of it (86%).

Executives surveyed working in a large organization are statistically more likely to have already heard of the International Mobility Program and its Mobilité Francophone stream (33%).

Table: Knowledge of the Mobilité Francophone program by region

Q5: In most cases, before a business can hire a foreign worker, they apply for and receive a Labour Market Impact Assessment (LMIA) showing there is a need for a foreign worker to fill the job. The Mobilité Francophone (MF) stream of the International Mobility Program allows employers outside of Quebec to hire French-speaking or bilingual (speaking English and French) foreign nationals without the need to obtain a Labour Market Impact Assessment. Have you heard of this program?

Base: All respondents

	Total (n=500)	British Columbia + Territories (n=77)	Alberta (n=91)	Prairies (MB, SK) (n=46)	Ontario (n=245)	Atlantic (n=41)
Yes	17%	15%	31%+	16%	12%-	24%
No	82%	83%	69%-	84%	86%+	74%
I don't know	1%	2%	0%	0%	2%	1%

Table: Knowledge of the Mobilité Francophone program by business size

Q5: In most cases, before a business can hire a foreign worker, they apply for and receive a Labour Market Impact Assessment (LMIA) showing there is a need for a foreign worker to fill the job. The Mobilité Francophone (MF) stream of the International Mobility Program allows employers outside of Quebec to hire French-speaking or bilingual (speaking English and French) foreign nationals without the need to obtain a Labour Market Impact Assessment. Have you heard of this program?

Base: All respondents

	Total (n=500)	Fewer than 10 employees (n=85)	10 to 199 employees (n=328)	200 and plus employees (n=80)
Yes	17%	13%	18%	33%+
No	82%	87%	80%	67%-
I don't know	1%	0%	1%	1%

Three-quarters of respondents (73%) who said they were familiar with the Mobilité Francophone stream felt they were not very familiar (41%) or only knew the stream by name (32%). Only one in 10 respondents say they are very familiar with the Mobilité Francophone stream (9%) and almost two in 10 say they are somewhat familiar (18%).

Table: Familiarity with the Mobilité Francophone program

Q6: How familiar are you with the Mobilité Francophone stream?

Base: Respondents who have heard of the Mobilité Francophone program

	Total (n=100)
Familiar	27%
Very	9%
Somewhat	18%
Not familiar	73%
Not very	41%
Just know the name	32%

The results show that executives surveyed who have heard of the Mobilité Francophone program and who work in a medium-sized business are significantly more likely to be familiar with the stream (30%).

Table: Familiarity with the Mobilité Francophone program according to business size

Q6: How familiar are you with the Mobilité Francophone stream?

Base: Respondents who have heard of the Mobilité Francophone program

	Total (n=100)	Fewer than 10 employees (n=13*)	10 to 199 employees (n=60)	200 or more employees (n=26*)
Familiar	27%	11%	30%+	15%
Very	9%	0%	10%+	2%
Somewhat	18%	11%	20%	13%
Not familiar	73%	89%	70%-	85%
Not very	41%	46%	41%	45%
Just know the name	32%	43%	29%	40%

* As n < 30, the data are presented for information purposes only

The main source from which respondents who have heard about the Mobilité Francophone stream obtained their information is a website (15%). To a lesser extent, others obtained their information from a newsletter (10%), from a candidate (10%), from another employer (9%) and at an information session (9%).

Table: Source of information for the Mobilité Francophone stream

Q7: How did you learn about the Mobilité Francophone stream? Select all that apply

Base: Respondents who have heard of the Mobilité Francophone program

	Total (n=100)
On a website	15%
In a newsletter	10%
From a candidate	10%
From another employer	9%
At an information session	9%
By myself / research	8%
Word of mouth (colleagues, friends, etc.)	7%
In the news / newspapers / etc.	4%
Government website	4%
Online (unspecified)	4%
From a school	3%
From an immigration lawyer / consultant	2%
From an agency	2%
At the Destination Canada Mobility Forum	1%
By email	1%
Other	14%
Nowhere / I haven't heard about it	6%
Don't know/No response	12%

Executives who have heard of the Mobilité Francophone Program and work for a medium-sized business are significantly more likely to have heard about the program from a website (19%), another employer (12%) or at an information session (11%) than those working for a small or large business.

Table: Source of Information for the Mobilité Francophone stream by business size

Q7: How did you learn about the Mobilité Francophone stream?

Base: Respondents who have heard of the Mobilité Francophone program

	Total (n=100)	Fewer than 10 employees (n=13*)	10 to 199 employees (n=60)	200 or more employees (n=26*)
On a website	15%	0%	19%+	13%
In a newsletter	10%	2%	12%	8%
From a candidate	10%	14%	10%	8%
From another employer	9%	0%	12%+	11%
At an information session	9%	0%	11%+	2%

By myself / research	8%	10%	8%	0%
Word of mouth (colleagues, friends, etc.)	7%	12%	6%	11%
In the news / newspapers / etc.	4%	10%	3%	0%
Government website	4%	0%	5%	3%
Online (unspecified)	4%	0%	4%	6%
From a school	3%	5%	3%	5%
From an immigration lawyer / consultant	2%	6%	0%	0%
From an agency	2%	4%	1%	0%
At the Destination Canada Mobility Forum	1%	0%	1%	4%
By email	1%	2%	0%	3%
Other	14%	27%	11%-	15%
Nowhere / I haven't heard about it	6%	11%	5%	14%
Don't know/No response	12%	0%	14%+	14%

* As n < 30, the data are presented for information purposes only

More than half of respondents who had heard of the Mobilité Francophone stream said they had not looked for information about it (54%). Three out of 10 respondents said they had found the information they were looking for on the use of the Mobilité Francophone stream (32%) and 14% said they had not.

Table: Found the information you were looking for on the Mobilité Francophone stream

Q8: Were you able to find all the information you needed to potentially use the Mobilité Francophone stream?

Base: Respondents who have heard of the Mobilité Francophone program

	Total (n=100)
Yes	32%
No	14%
Not applicable (I have not looked for information about using the Mobilité Francophone stream)	54%

Almost all respondents who had heard of the Mobilité Francophone stream had never used it (96%). In fact, only 4% of respondents who had heard of the stream had ever used it to hire employees.

Table: Use of the Mobilité Francophone program

Q10: Have you ever used the Mobilité Francophone stream to hire employees?

Base: Respondents who have heard of the Mobilité Francophone program

	Total (n=100)
Yes	4%
No	96%

When asked about the number of times the program was used, the most recent year of use, the refusal of an application and the reasons for refusal, there were too few participants who used the Mobilité Francophone stream to hire employees (n=3). Therefore, no conclusions can be drawn. Nevertheless, we can generally observe that respondents who have already used the Mobilité Francophone stream to hire employees have used it between 1 and 20 times. The years these respondents used the program were 2016, 2019, and 2020. The results also show that some of the respondents who have already used the Mobilité Francophone stream have already had an application submitted by their organization under the Mobilité Francophone stream that was refused.

In terms of interest in the program, three out of 10 respondents who have never heard of or used the Mobilité Francophone stream say they are interested (30%), while seven out of 10 respondents (70%) are not very (27%) or not at all (44%) interested in the stream.

Table: Interest in the Mobilité Francophone program

Q15: How interested are you in using the Mobilité Francophone stream?

Base: Respondents who have never heard of or used the Mobilité Francophone program

	Total (n=497)
Very	7%
Somewhat	23%
Not very	27%
Not at all	44%

Significantly more respondents from British Columbia or the Territories are interested in using the Mobilité Francophone stream (41%). Statistically fewer executives in large organizations say they are not interested in the Mobilité Francophone stream at all (32%).

Table: Interest in the Mobilité Francophone program by region

Q15: How interested are you in using the Mobilité Francophone stream?

Base: Respondents who have heard of the Mobilité Francophone program

	Total (n=497)	British Columbia + Territories (n=77)	Alberta (n=90)	Prairies (MB, SK) (n=44)	Ontario (n=245)	Atlantic (n=41)
Interested	30%	41%+	27%	21%	27%	30%
Very	7%	14%+	4%	6%	5%	6%
Somewhat	23%	28%	23%	14%	22%	23%
Not interested	70%	59%-	73%	79%	73%	70%
Not very	27%	20%	28%	28%	29%	26%
Not at all	44%	39%	46%	52%	43%	44%

Table: Interest in the Mobilité Francophone program by business size

Q15: How interested are you in using the Mobilité Francophone stream?

Base: Respondents who have heard of the Mobilité Francophone program

	Total (n=497)	Fewer than 10 employees (n=85)	10 to 199 employees (n=326)	200 or more employees (n=79)
Interested	30%	27%	30%	37%
Very	7%	10%	5%	4%
Somewhat	23%	17%	25%	32%
Not interested	70%	73%	70%	63%
Not very	27%	28%	26%	31%
Not at all	44%	44%	44%	32%-

Direct email is the preferred means of obtaining information for respondents interested in the Mobilité Francophone stream (63%). Three in 10 respondents mention the IRCC website as a source of information (31%). One in 10 say they prefer webinars (14%) or a newsletter from the IRCC or another source (13%).

Table: Preferred source for information on the Mobilité Francophone program

Q16: How would you prefer to get more information about the Mobilité Francophone stream?

Base: Respondents who are very or somewhat interested in using the Mobilité Francophone stream

	Total (n=156)
Direct email	63%
IRCC website	31%
Webinars	14%
e-Newsletter from IRCC or other source	13%
Kiosks at events	6%
In-person information sessions	3%
By mail / by post	2%
Online (unspecified)	1%
Other	1%
Don't know	2%

Executives who are very or somewhat interested in using the Mobilité Francophone stream and who work in a medium-sized business are statistically less likely to prefer to receive information through the IRCC website (27%), in-person information sessions (1%) or online (0%).

Table: Preferred source of information on the Mobilité Francophone program by business size

Q16: How would you prefer to get more information about the Mobilité Francophone stream?

Base: respondents who are very or somewhat interested in using the Mobilité Francophone stream

	Total (n=156)	Fewer than 10 employees (n=24*)	10 to 199 employees (n=100)	200 or more employees (n=29*)
Direct email	63%	52%	66%	61%
IRCC website	31%	46%	27%-	32%
Webinars	14%	9%	16%	8%
e-Newsletter from IRCC or other source	13%	17%	11%	25%
Kiosks at events	6%	12%	4%	0%
In-person information sessions	3%	11%	1%-	0%
By mail / by post	2%	0%	3%	0%
Online (unspecified)	1%	5%	0%-	5%
Other	1%	0%	1%	0%
Don't know	2%	0%	2%	7%

* As n < 30, the data are presented for information purposes only

One in four respondents who are very or somewhat interested in using the Mobilité Francophone Stream or who have used the Mobilité Francophone Stream would use the program to reach qualified/competent candidates (25%). One in 10 would use it simply because their organization is recruiting (10%) or to reach Francophone candidates (9%). Nearly one in 10 respondents would use the Mobilité Francophone stream to reach bilingual candidates (8%) or during a labour shortage (8%).

Table: Reasons to use the Mobilité Francophone stream

Q17: Why would you use the Mobilité Francophone stream for hiring in the future?

Base: Respondents who are very or somewhat interested in using the Mobilité Francophone stream or who have already used the Mobilité Francophone stream

	Total (n=159)
Reach qualified/competent candidates	25%
We are recruiting	10%
Reach French-speaking candidates	9%
Reach bilingual candidates	8%
Labour shortage / Difficult to find candidates	8%
Reach a diversity of candidates	5%
New recruitment method / Expand the pool of opportunities	5%
Interested in trying / Need more information / Not familiar enough with the stream	5%
To enlarge / Expand to other markets / provinces / etc.	4%

Reach more candidates	3%
Reach candidates outside of Canada (if required)	3%
Faster recruitment	2%
Lower cost of recruitment	1%
Useful / Facilitates recruitment	1%
Other	12%
Will not use	2%
Don't know/No response	6%

One in five respondents who are not very or not at all interested in using the Mobilité Francophone Stream would not use the Mobilité Francophone Stream for hiring in the future because they work for an organization that hires only Anglophones or does not need Francophones (24%). One in five respondents would not use the stream in the future because they do not need or are not interested in it (20%). One in 10 respondents would not use the Mobilité Francophone stream because they prefer to hire local candidates (12%), because the organization is not currently hiring (8%) or because the organization uses other means of recruitment (8%).

Table: Reasons for not using the Mobilité Francophone stream

Q18: Why wouldn't you use the Mobilité Francophone stream for hiring in the future?

Base: Respondents who are not very or not at all interested in using the Mobilité Francophone stream

	Total (n=341)
We hire English speakers / No need for French speakers	24%
Not needed / Not interested (unspecified)	18%
We can find / prefer to favour local candidates	12%
We are not currently / regularly hiring / No positions available	8%
We use other means of recruitment	8%
I don't know / not familiar with this stream	5%
We don't need / have no difficulty finding bilingual workers	5%
We need candidates with specific / demanding qualifications	4%
We generally hire our own references / people within our organization	3%
We receive enough applications for our needs / The positions are easily filled	3%
It's too complicated	2%
We only hire people legally entitled to work in Canada / permanent residents / licensed	2%
It's not my decision / Someone else is in charge	1%
To avoid government regulation	1%
Other	8%
Don't know/No response	3%

Respondents from the Prairies are significantly more likely to say that they would not use the Mobilité Francophone stream because the organization they work for hires only Anglophones or because they do not need Francophones (44%). Ontario respondents are

significantly more likely to have said they would not use the Mobilité Francophone stream for hiring in the future because their organization is not currently hiring (11%). Albertans are significantly more likely to say that they receive enough applications for their needs (5%).

It is also significantly more likely that an executive working in a small organization would not use the Mobilité Francophone stream because his or her organization is not currently or regularly hiring (18%).

Table: Reasons for not using the Mobilité Francophone stream by region

Q18: Why wouldn't you use the Mobilité Francophone stream for hiring in the future?

Base: Respondents who are not very or not at all interested in using the Mobilité Francophone stream

	Total (n=341)	British Columbia + Territories (n=42)	Alberta (n=67)	Prairies (MB, SK) (n=32)	Ontario (n=172)	Atlantic (n=28*)
We hire English speakers / No need for French speakers	24%	24%	16%	44%+	23%	23%
Not needed / Not interested (unspecified)	18%	22%	24%	10%	17%	20%
We can find / prefer to favour local candidates	12%	4%	15%	15%	14%	13%
We are not currently / regularly hiring / No positions available	8%	4%	3%	14%	11%+	2%
We use other means of recruitment	8%	10%	0%-	14%	9%	12%
I don't know / not familiar with this stream	5%	8%	8%	2%	2%-	11%
We don't need / have no difficulty finding bilingual workers	5%	6%	8%	5%	3%	0%
We need candidates with specific / demanding qualifications	4%	2%	5%	4%	5%	0%
We generally hire our own references / people within our organization	3%	5%	3%	6%	2%	0%
We receive enough applications for our needs / Positions are easily filled	3%	0%	8%+	0%	2%	4%
It's too complicated	2%	0%	2%	0%	2%	0%
We only hire people legally entitled to work in Canada / permanent residents / licensed	2%	0%	2%	0%	3%	4%
It's not my decision / Someone else is in charge	1%	0%	1%	0%	0%	4%
To avoid government regulation	1%	5%+	0%	0%	0%	0%

We are looking for part-time / on-call employees	0%	0%	3%+	0%	0%	0%
Other	8%	14%	8%	4%	8%	0%
Don't know/No response	3%	0%	2%	0%	4%	9%

* As n < 30, the data are presented for information purposes only

Table: Reasons for not using the Mobilité Francophone stream by business size

Q18: Why wouldn't you use the Mobilité Francophone stream for hiring in the future?

Base: Respondents who are not very or not at all interested in using the Mobilité Francophone stream

	Total (n=341)	Fewer than 10 employees (n=61)	10 to 199 employees (n=226)	200 or more employees (n=50)
We hire English speakers / No need for French speakers	24%	28%	23%	9%-
Not needed / Not interested (unspecified)	18%	14%	20%	22%
We can find / prefer to favour local candidates	12%	10%	14%	13%
We are not currently / regularly hiring / No positions available	8%	18%+	5%-	4%
We use other means of recruitment	8%	5%	9%	3%
I don't know / not familiar with this stream	5%	4%	5%	8%
We don't need / have no difficulty finding bilingual workers	5%	8%	3%-	9%
We need candidates with specific / demanding qualifications	4%	5%	4%	5%
We generally hire our own references / people within our organization	3%	2%	3%	1%
We receive enough applications for our needs / Positions are easily filled	3%	3%	2%	3%
It's too complicated	2%	2%	2%	0%
We only hire people legally entitled to work in Canada / permanent residents / licensed	2%	0%	3%	5%
It's not my decision / Someone else is in charge	1%	0%	1%	4%+
To avoid government regulation	1%	2%	0%	0%
We are looking for part-time / on-call employees	0%	2%	0%	2%
Other	8%	7%	8%	12%
Don't know/No response	3%	1%	3%	5%

In general, one in 10 respondents said that receiving more information about the stream or being more aware of it (12%) or needing bilingual or Francophone employees (10%) would make the Mobilité Francophone stream more appealing. One in five say that nothing would make the stream more appealing (20%).

Table: Changes to be made to make the Mobilité Francophone stream more appealing

Q19: What changes, if any, do you feel would make the Mobilité Francophone stream more appealing to your organization?

Base: All respondents

	Total (n=500)
Receive more information on the stream / Awareness	12%
Need employees / bilingual / French-speaking customer offers	10%
Have more requests / need to hire more employees	2%
Provide access to candidates with specialized skills	2%
Expansion of our business / to other provinces / other French-speaking countries	2%
Receive an incentive / grant for hiring / training	2%
Shortage of local labour	1%
More accessibility for candidates	1%
A simpler process for recruiting workers from outside of Canada / Avoiding LMIA (Labour Market Impact Assessment)	1%
Other	8%
Nothing / No need	20%
Don't know/No response	39%

Prairie respondents are significantly more likely to say that providing access to candidates with specialized skills would make the stream more appealing (9%). Significantly more respondents from British Columbia or the Territories say that expanding the business they work for to other provinces or other French-speaking countries would make the stream more appealing (6%). Significantly more Albertans say that a local labour shortage would make the Mobilité Francophone stream more appealing to them (4%).

Table: Changes to be made to make the Mobilité Francophone stream more appealing by region

Q19: What changes, if any, do you feel would make the Mobilité Francophone stream more appealing to your organization?

Base: All respondents

	Total (n=500)	British Columbia + Territories (n=77)	Alberta (n=91)	Prairies (MB, SK) (n=46)	Ontario (n=245)	Atlantic (n=41)
Receive more information on the stream / Awareness	12%	18%	7%	7%	13%	7%
Need employees / bilingual / French-speaking customer offers	10%	10%	10%	14%	10%	0%-

Have more requests / need to hire more employees	2%	2%	3%	0%	2%	0%
Provide access to candidates with specialized skills	2%	1%	3%	9%+	2%	0%
Expansion of our business / to other provinces / other French-speaking countries	2%	6%+	2%	0%	1%	3%
Receive an incentive / grant for hiring / training	2%	2%	0%	3%	3%	3%
Local labour shortage	1%	1%	4%+	0%	0%	0%
More accessibility for candidates	1%	3%	2%	0%	1%	0%
A simpler process for recruiting workers from outside of Canada / Avoiding LMIA (Labour Market Impact Assessment)	1%	1%	2%	0%	2%	0%
Other	8%	4%	9%	11%	9%	11%
Nothing / No need	20%	16%	23%	19%	22%	16%
Don't know/No response	39%	39%	36%	39%	37%	60%+

One in three respondents who are very or somewhat interested in using the Mobilité Francophone stream or who have already used it say that providing access to more information, education or advertisements would make it easier to use the program (33%). One in 10 say that nothing would make it easier to use the Mobilité Francophone stream (13%).

Table: Suggestions to facilitate the use of the Mobilité Francophone stream

Q20: What, if anything, could be done to make the Mobilité Francophone stream easier for your organization to use?

Base: Respondents who are very or somewhat interested in using the Mobilité Francophone stream or who have already used the Mobilité Francophone stream.

	Total (n=159)
Access to more information / Education / Advertising	33%
Provide access to online information	3%
More candidates available	1%
Easy to use / convenient	1%
Other	9%
Nothing	13%
Don't know/No response	38%

People from British Columbia or the Territories are significantly more likely to say that providing access to more information through education or advertisements would make the program easier to use (33%). Ontarians are significantly more likely to say that providing access to information online would make it easier to use the stream (8%).

Table: Interest in the Mobilité Francophone program by region

Q20: What, if anything, could be done to make the Mobilité Francophone stream easier for your organization to use?

Base: Respondents who are very or somewhat interested in using the Mobilité Francophone stream or who have already used the Mobilité Francophone stream

	Total (n=159)	British Columbia + Territories (n=35)	Alberta (n=24*)	Prairies (MB, SK) (n=14*)	Ontario (n=73)	Atlantic (n=13*)
Access to more information / Education / Advertising	33%	47%+	38%	38%	22%-	33%
Provide access to online information	3%	0%	0%	0%	8%+	0%
More candidates available	1%	3%	0%	1%	0%	5%
Easy to use / convenient	1%	0%	7%	0%	0%	0%
Other	9%	4%	0%	19%	16%+	0%
Nothing	13%	11%	9%	6%	16%	18%
Don't know/No response	38%	35%	46%	36%	38%	45%

* As n < 30, the data are presented for information purposes only

Almost three out of five respondents did not participate in or visit the various activities presented to them (59%). A quarter of respondents attended a job fair (virtual or in-person) (26%) or used the services of a public employment agency (26%). Fewer than one in 10 respondents visited an online job board posted by a local Francophone organization (8%) and only 1% of respondents participated in a recruiting event intended for Francophone or bilingual immigrants organized by the IRCC or in Destination Canada's mobility forum.

Table: Participation in various activities

Q21: Have you and/or your organization ever visited or participated in any of the following?

Base: All respondents

	Total (n=500)*
A job fair (virtual or in-person)	26%
Employed the services of a public employment agency	26%
An online job board posted by a local Francophone organization	8%
A recruiting event intended for Francophone or bilingual (English and French) immigrants organized by Immigration, Refugees and Citizenship Canada (IRCC)	1%
The Destination Canada Mobility Forum	1%
None of the above	59%

* Since respondents could provide more than one answer, the total may exceed 100%.

The results show that respondents from the Atlantic provinces are significantly more likely to have attended a recruiting event intended for Francophone or bilingual immigrants organized by the IRCC (8%) or a Destination Canada mobility forum (8%).

Executives who work in medium-sized (30%) or large (52%) organizations are also significantly more likely to have attended a job fair. Conversely, an executive working for a small organization is significantly more likely to have not participated in any of the activities presented (70%).

Table 19: Participation in different activities depending on the region

Q21: Have you and/or your organization ever visited or participated in any of the following?

Base: All respondents

	Total (n=500)	British Columbia + Territories (n=77)	Alberta (n=91)	Prairies (MB, SK) (n=46)	Ontario (n=245)	Atlantic (n=41)
A job fair (virtual or in-person)	26%	32%	24%	21%	23%	38%
Employed the services of a public employment agency	26%	30%	20%	20%	29%	12%-
An online job board posted by a local Francophone organization	8%	2%-	5%	9%	10%	16%
A recruiting event intended for Francophone or bilingual (speaking English and French) immigrants organized by Immigration, Refugees and Citizenship Canada (IRCC)	1%	1%	0%	0%	0%	8%+
The Destination Canada Mobility Forum	1%	0%	0%	0%	0%	8%+
None of the above	59%	55%	66%	68%	57%	53%

Table: Participation in different activities depending on business size

Q21: Have you and/or your organization ever visited or participated in any of the following?

Base: All respondents

	Total (n=500)	Fewer than 10 employees (n=85)	10 to 199 employees (n=328)	200 or more employees (n=80)
A job fair (virtual or in-person)	26%	14%-	30%+	52%+
Employed the services of a public employment agency	26%	22%	27%	27%
An online job board posted by a local Francophone organization	8%	3%	9%+	13%

A recruiting event intended for Francophone or bilingual (speaking English and French) immigrants organized by Immigration, Refugees and Citizenship Canada (IRCC)	1%	0%	1%	3%
The Destination Canada Mobility Forum	1%	0%	1%	0%
None of the above	59%	70%+	55%-	38%-

In general, three in 10 respondents mention using *Indeed* to recruit employees (34%) or online websites/bulletin boards (27%). Two in 10 respondents mention word of mouth as one of the ways they recruit new employees (20%). About one in 10 respondents have used Job Bank or government resources (9%) and social networks in general (9%). Several other sources have been used to a lesser extent by participants, including Facebook (8%), newspapers (8%), the company website (7%) and LinkedIn (5%).

Table: Resources used to recruit employees

Q23: What other resources have you used to recruit employees not mentioned above?

Base: All respondents

	Total (n=500)*
Indeed	34%
Websites / Online bulletin boards (other and unspecified)	27%
Word of mouth	20%
Job Bank / Government resources	9%
Social networks (other and unspecified)	9%
Employment agencies / Private agencies / Recruitment firms / Headhunters	8%
Facebook	8%
Newspapers	8%
Our company website / Our own recruitment application / Internal recruitment	7%
Schools/Universities	6%
Kijiji	5%
LinkedIn	5%
Resource / Local advertising	4%
Displays / at the entrance / in the shop	3%
Job boards	3%
Walk-in recruitment	2%
Advertisements (unspecified)	1%
Monster	1%
Radio	1%
Job fair	1%
YMCA	1%
Other	13%

Nothing	6%
Don't know/No response	2%

* Since respondents could provide more than one answer, the total may exceed 100%.

Prairie respondents are significantly less likely to have used *Indeed* to recruit new employees (8%). British Columbia or Territories respondents were significantly more likely to have used websites or online bulletin boards (38%), private employment agencies (14%) and LinkedIn (9%). Significantly more Albertans have used Kijiji as a recruitment resource (10%). Ontarians are statistically more likely to have placed an ad in a newspaper (11%). Respondents from the Atlantic provinces are statistically more likely to have used Job Bank or government resources (28%), social networking in general (21%) and Facebook (17%).

Significantly more executives working in a medium-sized business have used Indeed to recruit employees (37%) or online websites or bulletin boards (29%). Executives surveyed working in a large organization were significantly more likely to have used their company website (17%) or a presence in schools or universities (18%).

Table: Resources used to recruit employees by region

Q23: What other resources have you used to recruit employees not mentioned above?

Base: All respondents

	Total (n=500)	British Columbia + Territories (n=77)	Alberta (n=91)	Prairies (MB, SK) (n=46)	Ontario (n=245)	Atlantic (n=41)
Indeed	34%	40%	36%	8%-	35%	35%
Websites / Online bulletin boards (other and unspecified)	27%	38%+	28%	27%	22%-	19%
Word of mouth	20%	15%	25%	34%+	17%	24%
Job Bank / Government resources	9%	2%-	12%	4%	8%	28%+
Social networks (other and unspecified)	9%	6%	13%	19%+	5%-	21%+
Employment agencies / Private agencies / Recruitment firms / Headhunters	8%	14%+	7%	0%-	9%	3%
Facebook	8%	12%	9%	8%	5%-	17%+
Newspapers	8%	6%	2%-	6%	11%+	8%
Our company website / Our own recruitment application / Internal recruitment	7%	11%	6%	9%	5%	9%
Schools/Universities	6%	4%	4%	5%	7%	3%

Kijiji	5%	3%	10%+	3%	3%	14%+
LinkedIn	5%	9%+	5%	4%	3%-	6%
Resource / Local advertising	4%	2%	4%	15%+	3%	6%
Displays / at the entrance / in the shop	3%	4%	3%	2%	3%	0%
Job boards	3%	4%	0%	2%	3%	15%+
Walk-in recruitment	2%	1%	2%	2%	2%	0%
Advertisements (unspecified)	1%	0%	3%	0%	2%	0%
Monster	1%	2%	0%	0%	2%	3%
Radio	1%	0%	0%	0%	1%	3%
Job fair	1%	1%	0%	0%	2%	5%+
YMCA	1%	0%	0%	0%	2%+	0%
Other	13%	15%	10%	15%	14%	1%-
Nothing	6%	8%	6%	2%	7%	0%
Don't know/No response	2%	0%	2%	6%+	2%	0%

Table: Resources used to recruit employees by business size

Q23: What other resources have you used to recruit employees not mentioned above?

Base: All respondents

	Total (n=500)	Fewer than 10 employees (n=85)	10 to 199 employees (n=328)	200 or more employees (n=80)
Indeed	34%	26%-	37%+	33%
Websites / Online bulletin boards (other and unspecified)	27%	20%	29%+	37%
Word of mouth	20%	26%	18%-	15%
Job Bank / Government resources	9%	7%	9%	7%
Social networks (other and unspecified)	9%	8%	9%	15%
Employment agencies / Private agencies / Recruitment firms / Headhunters	8%	2%-	11%+	11%
Facebook	8%	10%	8%	5%
Newspapers	8%	8%	8%	7%
Our company website / Our own recruitment application / Internal recruitment	7%	6%	8%	17%+
Schools/Universities	6%	5%	6%	18%+
Kijiji	5%	3%	6%	2%
LinkedIn	5%	3%	5%	10%
Resource / Local advertising	4%	4%	4%	4%
Displays / at the entrance / in the shop	3%	2%	3%	2%
Job boards	3%	1%	4%	16%+

Walk-in recruitment	2%	3%	1%	0%
Advertisements (unspecified)	1%	0%	2%	2%
Monster	1%	1%	2%	3%
Radio	1%	1%	1%	4%+
Job fair	1%	0%	2%	6%+
YMCA	1%	1%	1%	1%
Other	13%	15%	12%	9%
None	6%	7%	6%	7%
Don't know/No response	2%	3%	1%	4%

The majority of respondents were not aware that the IRCC has a team of outreach officers who can help employers understand immigration programs, including the Mobilité Francophone stream (85%). In fact, only 15% of respondents knew this.

Table: Awareness of the Mobilité Francophone Outreach Team

Q24: Are you aware that IRCC has a team of Outreach Officers who can help employers understand immigration programs, including the Mobilité Francophone stream?

Base: All respondents

	Total (n=500)
Yes	15%
No	85%

Significantly more respondents from the Atlantic provinces were aware that the IRCC has a team of outreach officers (27%).

Table: Awareness of the Mobilité Francophone Outreach team by region

Q24: Are you aware that IRCC has a team of Outreach Officers who can help employers understand immigration programs, including the Mobilité Francophone stream?

Base: All respondents

	Total (n=500)	British Columbia + Territories (n=77)	Alberta (n=91)	Prairies (MB, SK) (n=46)	Ontario (n=245)	Atlantic (n=41)
Yes	15%	9%	18%	20%	13%	27%+
No	85%	91%	82%	80%	87%	73%-

Appendix A – Detailed Research Methodology

A.1 Quantitative Methodology

A.1.1 Methods

The quantitative research consisted of telephone interviews. The interviews were conducted using a computer-assisted telephone interviewing system (CATI technology). This approach is the most appropriate for reaching businesses of different sizes while ensuring a high level of representativeness.

Léger adheres to the most stringent quantitative research guidelines. The questionnaire was written following the Standards for the Conduct of Government of Canada Public Opinion Research – Series B – Quantitative research.

Respondents were assured of the voluntary and confidential nature of the approach and the anonymity of their responses. As with all research conducted by Léger, all information that could allow for the identification of participants was removed from the data, in accordance with the *Privacy Act* of Canada.

All research interviews were conducted from the Montreal call centre, which has three separate divisions: one with English-only interviewers, one with French-only interviewers and one with bilingual interviewers, and from the Winnipeg call centre. These divisions ensure that all telephone surveys can easily be conducted in either official language.

A.1.2 Data Collection

Data collection for the survey was conducted between February 24 and March 19, 2021. The response rate for this survey was 33.9%. Complete call disposition is presented in Appendix A. A pre-test of 20 interviews, in both official languages, was completed on February 25, 2021.

To obtain reliable data for each of the sub-groups, a total sample of 500 Canadian professionals responsible for hiring new employees was surveyed. This was done in all regions of the country, with the exception of the province of Quebec which was not included in the study. Only one adult respondent was interviewed in each organization. The national margin of error for this survey is +/- 4.38%, 19 times out of 20.

A representative sample of approximately 500 decision makers

A sample of Canadians responsible for hiring employees was established using a stratified regional sampling approach. Flexible regional quotas were applied to ensure that a sufficient number of interviews were conducted in each region of Canada under study.

A.1.3 Sampling procedures

Landline numbers were purchased¹ using a stratified regional sampling approach. The telephone interviews were conducted using Léger's Computer Assisted Telephone Interviewing (CATI) system. Léger's CATI system manages the sampling electronically, by selecting and randomly dialing the phone number to be called. To ensure perfect population coverage, the sample included business telephone numbers located in all provinces and territories in Canada, except the province of Quebec. Flexible quotas were set to ensure a sufficient number of interviews in each region of Canada under study.

A.1.4 Maximize the response rate

A low response rate compromises the reliability and validity of a survey. Based on its experience in surveying various populations, Léger has established the following methods to maximize response rates:

- Include a toll-free number for respondents to call if needed;
- Be patient in discussions with respondents to help maintain their interest in the survey and to limit dropouts during the call;
- Prepare arguments that interviewers can use to inform respondents about the importance of their participation: the usefulness of the study for them and their company, etc.;
- Assign experienced interviewers to contact households and target the appropriate respondent;
- Make a minimum of eight callbacks to each number and schedule callback appointments (even for the initial contact);
- Include contact information for an experienced researcher so that respondents can confirm the validity of the research.

¹ Léger has been purchasing samples from ASDE Survey Sampler, a reputable and reliable supplier, for over 15 years.

A.1.5 Call disposition

The overall response rate for this study is 5.0%. The participation rate is calculated using the following formula: Participation rate/response rate = $R \div (U + IS + R)$. Calculation details are presented in the table below.

Table. Determination of the call and response rate

Invalid sample	1,118
Inoperative	956
Residential	30
Fax / modem / pager	126
Duplicate	6
Unresolved (U)	8,856
No response	2,805
Answering machine	2,789
Line busy	114
Appointment	3,148
In-scope non-responding units (IS)	1,507
Refused	1,428
Language barrier	79
Responding units (R)	547
Quota full	3
Not qualified	40
Incomplete	4
Completed interviews	500
POTENTIALLY ELIGIBLE (U+IS+R)	10,910
Response rate	5.0%

A.1.6 Non-response bias and additional analysis

An effective response rate of 5.0% is normal for a national telephone survey of 500 respondents, conducted over a period of approximately three weeks. This is consistent with typical rates for similar surveys.

Weighting

Based on national data from Statistics Canada, Léger weighted the results of this survey by region, business size and industry.

Nevertheless, a basic comparison of the unweighted and weighted sample sizes was conducted to identify potential non-response bias that could be introduced by lower response rates among specific demographic sub-groups (see tables in the section below).

Table A1: Distribution of respondents by region

	Total (n=500)
Atlantic	7%
Ontario	47%
Prairies (MB, SK)	8%
Alberta	17%
British Columbia + Territories	21%

Table A2: Distribution of respondents by business size

	Total (n=500)
2 to 9 employees	25%
10 to 199 employees	73%
200 or more employees	1%

Table A3: Distribution of respondents by industry

	Total (n=500)
Manufacturing	8%
Accommodation and food services	11%
Construction	10%
Retail trade	13%
Health care and social assistance	9%
Transportation and warehousing	10%
Other	39%

A.1.7 Weighted and unweighted samples

The table below presents the geographic distribution of respondents, before and after weighting.

Table A4: Profile of respondents showing weighted and unweighted totals by region

	Weighted totals (n=500):	Unweighted totals (n=500):
Atlantic	33	41
Ontario	237	245
Prairies (MB, SK)	42	46
Alberta	85	91
British Columbia + Territories	103	77

Table A5: Profile of respondents showing weighted and unweighted totals by business size

	Weighted totals (n=500):	Unweighted totals (n=500):
2 to 9 employees	123	85
10 to 199 employees	366	328
200 or more employees	4	80

Table A6: Profile of respondents showing weighted and unweighted totals by industry

	Weighted totals (n=500):	Unweighted totals (n=500):
Manufacturing	42	88
Accommodation and food services	56	66
Construction	49	50
Retail trade	63	51
Health care and social assistance	43	36
Transportation and warehousing	52	32
Other	194	177

In some places where there are differences (e.g., respondents from large businesses), weighting corrects for these differences and restores the actual weight in the final results.

However, there is no evidence that the results of this study would have been significantly different if weighting had been applied prior to distribution. The relatively small weight sizes and differences in responses between various sub-groups suggest that data quality was not affected. The basic weighting that was applied (region, business size and industry) corrected the initial imbalance for data analysis purposes and no further manipulation was required.

As with all research conducted by Léger, contact information was kept entirely confidential and all information that could allow for the identification of participants was removed from the data, in accordance with the *Privacy Act* of Canada.

Appendix B – Quantitative Instrument

The quantitative instrument is provided in English and French under separate cover.