

# Advertising Pre-test: Effectiveness of creative executions on “Canadian Wireless Telecom Policy”

## -Final Report-

Prepared by:  
**TNS Canada**

Presented to:  
**Industry Canada**

For more information on this report, please email:  
[info@ic.gc.ca](mailto:info@ic.gc.ca)



POR Registration Number:  
PWGSC Contract Number:  
Contract Award Date:  
Delivery Date:

POR 023-13  
U1400-131461/001-CY  
September 18, 2013  
October 9, 2013

*Ce rapport est aussi disponible en français sur demande.*



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For more information please contact:

**Daniel Brousseau, CMRP**

**Vice President**

**Head of Customer Service - Quebec**

TNS Canada Inc.

Phone (514) 935-7666x239

Email [daniel.brousseau@tnsglobal.com](mailto:daniel.brousseau@tnsglobal.com)

Web [www.tnscanada.ca](http://www.tnscanada.ca)

Professional staff involved in this project:

- Guylaine Ally, Moderator

TNS Study Number 200102222



# Statement of Political Neutrality



## Political Neutrality Requirement

We hereby attest that the final deliverables comply with the political neutrality requirement in section 6.2.4 of the revised Procedures for Planning and Contracting Public Opinion Research in the Government of Canada.

October 9, 2013

**Daniel Brousseau, CMRP**

Vice President, Head of Customer Service - Quebec

**TNS**



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# Purpose and Objectives



# Purpose and Objectives

To address the current issues surrounding telecommunications, the Government of Canada has decided to launch a series of informative advertising. This approach aims to communicate the position and policy of the Government with respect to telecommunications and to clarify the confusion or misrepresentation that may be present in the minds of Canadians.

The main objective of the study was to evaluate the effectiveness of different creative executions – two proposed television concepts, and current radio (2) and print executions. Results will help to inform the choice of the more effective of the television concepts. Specifically, each ad was evaluated in a monadic way to identify the following elements:

- First reaction;
- Message comprehension;
- Tone assessment;
- Quality of advertising: clarity, credibility and relevance;
- Impact of advertising: appealing, memorable and motivating;
- Appropriateness for the audience;
- Possible improvements to make the advertising more effective;
- Ways to better inform Canadians;
- Information needed to help educate consumers.

# Methodology



# Methodology

A total of six (6) two hour focus groups were conducted; four in English (Mississauga and Chilliwack) and two in French (Montreal) from September 25 to 28, 2013. The groups were screened to include general adult population (18 years and over). All groups included a balance of genders, household incomes, and ethnic origins.

Group	Date	Location	Language	# Participants
1	Sept 25	Mississauga	English	10
2	Sept 25	Mississauga	English	9
3	Sept 26	Montreal	French	8
4	Sept 26	Montreal	French	8
5	Sept 28	Chilliwack	English	10
6	Sept 28	Chilliwack	English	11

Extrapolation of results: Although qualitative research (e.g. in depth interviews, focus groups) is highly valuable for providing insight into the needs, attitudes and opinions of an organization's target audience, customers and prospects, the results cannot be statistically inferred to any wider group of individuals than those who participated.

## Total Expenditures

Including travel expenses and incentives total expenditures were \$44,870.42.



# Communication materials tested

- The following communication materials were tested:
  - Two television storyboards (Competition and Choices)
  - Two radio ads (Noise and Rules currently being aired)
  - One print ad (currently featured in daily newspapers and magazines)
- In order to avoid order bias, the ads were rotated in each group.

# Key Findings



# Key Findings

- The majority of study participants were not aware of the current policies or regulations governing the wireless industry in Canada.
- Reactions to the advertising stimuli were similar in all cities visited and showed very little regional differences.
- Only a handful of participants recalled having seen or heard any recent government communication materials related to the wireless industry in Canada.
- All agreed that the ads presented would be more meaningful to those who are currently abreast of ongoing dialogues regarding wireless issues and concerns.
- Of the three communication media evaluated, the current print and radio ads appear the most effective at informing the public of the Government of Canada's position on the issues governing the Canadian wireless sector.

# Key Findings (cont'd)

- Overall, the proposed campaign was successful at communicating benefits of competition for Canadian wireless consumers.
- The campaign succeeded at raising consciousness but didn't communicate the tangible actions that are being considered by our Government.
- In both television executions, the copy alone, without the support of visuals contributed to communicating the intended messages.
- According to the majority of participants, the **Choices** television platform is preferred as it is engaging, relevant, and factual. Generally speaking, study participants in all cities alike, were more receptive to the claim reminding Canadians that they pay some of the highest wireless fees in the world. Although the ad is thought provoking, the objective of more choice, lower prices and better service is not totally clear.

# Key Findings (cont'd)

- The television concept labelled **Competition** was not clear enough to the majority of participants in all groups alike. The images seemed to promote sports rather than draw a parallel with other sectors where competition has proven to be beneficial. However, the copy, without the support of the images communicated the intended message and was clear on the government's intention to create more competition.
- All expect the website to give information seekers specific details regarding government intended actions and strategies. They would also expect to see rate comparisons to support the claim that Canadians pay some of the highest wireless rates in the world.
- Both radio ads were well received especially in English Canada. The vast majority of participants found the radio ads clearer.
- Overall, the print ad works well at communicating that the Government of Canada wants to set the record straight with regards to rules and regulations governing the Canadian wireless industry.

# Detailed Findings



# Reactions to the television storyboards

## Choices

- Although it was understood that the primary objective of this research was not to elect a winning concept, the Choices execution is clearly more effective at delivering a comprehensible and relevant message to wireless consumers.

*"This is more to the point"*

*"I got that one"*

*« C'est très clair »*

*« Je comprends plus où ils veulent en venir dans celle-là »*

# Reactions to the television storyboards (cont'd)

## Choices

- Most participants were able to relate to the story being told. This ad gave consumers a more realistic RTB (reason to believe).

*"Canadians deserve options"*

*« L'arrivée de la concurrence dans l'industrie de la téléphonie serait bénéfique pour les consommateurs »*

*"Canadians will benefit from a change in government policy with regards to wireless competition"*

*"This is realistic, I can see myself in this ad"*



# Reactions to the television storyboards (cont'd)

## Choices

- This particular ad was however the one that raised more cynicism especially in English Canada where a vocal minority felt this ad is for a policy that could have come sooner. This was also echoed in Montreal but to a lesser extent.

*"Why did the government allow that we pay so much in the first place?"*

*"Wants to be a feel good message..."*

*"Makes me angry to know that we've been paying so much for so long"*

*« Le gouvernement semble défendre ses intérêts... »*

# Reactions to the television storyboards (cont'd)

## Choices

- Several participants also felt that this ad was intended to gain public support for the government's proposed actions.

*"Not clear as to what exactly they would like us to support"*

*« Une réplique du gouvernement qui désire justifier son action de permettre aux compagnies étrangères d'entrer sur le marché »*

# Reactions to the television storyboards (cont'd)

## Choices

- Albeit the fact that all agreed that this ad was more engaging and factual, it left them guessing as to what specific actions the government intends to take.

*"Not enough information"*

*"...tell me what I can find in terms of information on the website"*

*"Since I am probably not going to check the website, they should tell me a bit more on what they plan on doing"*

*"So I need to know what they are going to do about it"*

# Reactions to the television storyboards (cont'd)

## Choices

- Several participants however admitted having been sufficiently intrigued to seek more information and visit the website.

*"I'd expect the website to give me rate comparisons with other countries"*

*"I want to know what the government plans on doing, I would hope to find this on the site"*

# Reactions to the television storyboards (cont'd)

## Choices

- In each city, a few participants who appeared less informed about wireless competition in Canada, interpreted the ad to imply that the government was soliciting the help of existing wireless companies in order to help Canadians pay less. Others understood that the ad wanted to promote the Government's intention to legislate and apply control over existing companies.

*"The government wants help from the wireless providers to bring prices down"*

*"Not clear...do they want to regulate Canadian companies?"*

*« Si tu n'as pas suivi l'actualité, tu ne sais pas de quoi ils parlent »*

# Reactions to the television storyboards (cont'd)

## Choices

- The visuals effectively depict the wireless market in Canada as well as the reaction associated with paying some of the highest wireless rates in the developed world.

*"When you see the 3 phones, you know who they are talking about"*

*"The woman however needs to look more upset"*

- One additional observation reported in one of the Montreal groups referred to frame 5 and 6 of this ad which is said to lack credibility. The man seen watching a hockey game while walking appears a bit farfetched.

*« Il regarde le hockey sur son téléphone en marchant... »*

# Reactions to the television storyboards (cont'd)

## Choices

- In an effort to portray a more realistic context, some participants suggested replacing the paper cell phone bill with an electronic bill.

*« Il devrait montrer une facture électronique et non papier »*

*"I don't get paper bills, that's not me"*

# Reactions to the television storyboards (cont'd)

## Competition

- In this particular execution, the copy alone, without the support of the visuals contributed to delivering the intended message. Several participants also believe this ad to be slightly more transparent with regards to what the government intends to do.

*"Competition is important" "Competition brings growth"*

*"The government wants to allow competition to come into Canada"*

*« Que la compétition dans l'industrie sans fil pourrait être utile à tous les Canadiens »*

*« Que le gouvernement s'engage à travailler pour améliorer la situation des consommateurs de l'industrie sans fil »*



# Reactions to the television storyboards (cont'd)

## Competition

- While the message may have been clearer, there was a general consensus in all groups alike that the story being told in support of the message is rather misleading. Showing Canadian triumphing athletes initially misled participants into thinking that this ad's first intention was to promote Canadian sportsmanship.

*"I felt a little lost in this one"*

*"The first four shots have nothing to do with wireless ..."*

*« J'ai de la misère à voir le lien entre la compétition humaine et la compétition commerciale dans l'industrie sans fil »*

# Reactions to the television storyboards (cont'd)

## Competition

- The screen shots showing the students using their smartphones and the Inuit youth holding a tablet added to the confusion.

*"At first it looks like they advocate technology"*

*« La radiographie de l'os sert à quoi »*

- In order to avoid such confusion or misinterpretation, some participants suggested inverting the sequence in the story being told.

*"Start with what the government wants to say about the wireless competition and then compare it to other areas where competition is good"*

# Reactions to the radio ads

- Two radio ads were presented to the group participants.
- In order to avoid order bias, the ads were rotated in each group.
- Both radio ads were well received especially in English Canada. The vast majority of participants found the radio ads clearer. Several Montreal participants claimed to be indifferent to the radio ads.

*"Right to the point"*

*« Je me sens moins concerné »*

*« C'est ... moins accrocheur »*

# Reactions to the radio ads (cont'd)

- In Montreal, a few participants reacted negatively to... “Il est temps de parler des véritables intérêts des Canadiens” (It’s time to talk about what’s really best for Canadians) that was presented in the Noise radio spot.

*« Quoi.....on n’en parlait pas d’habitude des intérêts des Canadiens »*

# Reactions to the print ads

- Overall, the print ad works well at communicating that the Government of Canada wants to set the record straight with regards to rules and regulations governing the Canadian wireless industry.
- All agree that the headline is eye catching. However, some participants in Chilliwack claim to expect an official government policy to be more complex and multifaceted.

*"This is more a point of view than a policy"*

- Everyone however voiced their desire to know more about the facts and less about the noise.

*« Moins sur les rumeurs et plus sur les faits »*

*"I definitely want more facts"*

# Reactions to the print ads (cont'd)

- Some viewed this message as a Government rebuttal towards leading wireless companies. Others feel it acts as a teaser for something that is “coming”.

*« Il nous fait part de la petite guéguerre avec le gouvernement et les compagnies de sans-fil »*

*“Sounds like they want to pull us into their fight”*

- A few participants shared the view that the tone of the message was unexpected.

*« Je m’attends à un texte plus intelligent de la part du gouvernement »*

# Conclusions

- The communication materials presented work well at informing the public and wireless users that the government is looking into ways of reducing wireless rates for Canadians. This holds true for both French and English materials.
- The story told and message communicated in the Choices concept is engaging, informative and thought provoking. The concept is relatable and provides the viewer with information that may help them form an opinion on this issue. Incorporating the government's intention to create more competition in the wireless industry as referred to in the Competition ad would at least give the viewer an inkling as to what the government intends to do.
- The radio ads are seen as clear and are a useful complement to the television spots.
- The print ad without the support of the other media is viewed simply as stating a "fact". It is perceived more as a public notice directed at informing the public on the state of affairs in the wireless industry in Canada.

# Conclusions (cont'd)

- Industry Canada may want to consider the following suggestions when finalizing the television concepts or fine-tuning future communication materials.

## Choices:

- The facial expressions of the characters need to their situation.
- Rethink the use of “noise” to refer to media coverage on the wireless sector. Words like “assumptions” or “talk” may be more suitable government semantics.
- In order to avoid possible sarcasm in the interpretation of... “It’s time to talk about what’s really best for Canadians”... the creators may want to borrow the phrase from the **Competition** concept and replace it with ... “That’s why the Government of Canada is working to create more competition in the wireless industry”.



# Conclusions (cont'd)

## **Competition:**

- Illustrating Canadian athletes at the onset of the ad sends viewers a message that can be misunderstood by some.
- In this concept, the copy is this ad's strongest feature.
- The pride derived from these images appears to be in conflict with the idea of increased foreign competition.
- The flag and parliament building in the last two shots may not be essential.

## **The radio ads:**

- The tone of the announcer is an important element to consider.
- Presenting new news or taking a stand on some issue requires a dynamic delivery.
- The French versions of the radio ads were at times qualified as uninspired in contrast with the reaction to the English versions.

# Conclusions (cont'd)

## **The print ad:**

- The sound waves radiating from the parliament illustration was questioned.
- The headline is likely to engage the reader.
- The government of Canada rebutting the wireless companies was considered reactive by some.
- Some consumers hoped the print ad would explain the wireless policy in greater detail.

# Appendix



# Research instruments

## Discussion guide and participant questionnaire



ENGLISH



FRENCH

# Communication materials tested

## Television story boards – Competition (English)

CONCEPT 1



SHOT 1: Child standing on stage at a spelling bee.



SHOT 2: Triathlete struggling at finish.



SHOT 3: Canadian special olympian heavy-lifter jerking the bar triumphantly over his head.



SHOT 4: "The Goal" from Russia Canada series.

**"Competition: It makes us sweat.."**

**"It shapes us."**

**"It makes us strong."**

**"Without it, there is no greatness. Canadians know this well."**



SHOT 5: University students researching on their smart phones.



SHOT 6: Construction worker on cell phone, nods.



SHOT 7: Close up of tablet with doctor in small window. Zoom out to reveal x-ray in the large window and hand holding tablet.

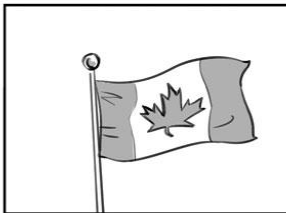


SHOT 8: Flip perspective to show an injured Inuit youth holding the tablet with father next to him.

**"They compete everyday, to be the brightest,"**

**"to get the job.."**

**"to make a difference."**



SHOT 9: Canadian flag flying proudly above Parliament hill. Zoom out to see Peace Tower.



SHOT 10: Zoom out to see Parliament.



SHOT 11: Fade to Parliament graphic with "More Choice, Lower Prices, Better Service." and Canada.ca/MoreChoices



SHOT 12: Canada Wordmark and sound logo.

**"Shouldn't wireless companies do the same?"**

**"That's why the Government of Canada is working to create more competition in the wireless industry."**

**"Because with healthy competition, we all win, as consumers, as citizens, as a country."**

**"A message from the Government of Canada."**

# Communication materials tested

## Television story boards – Competition (French)

CONCEPT 1



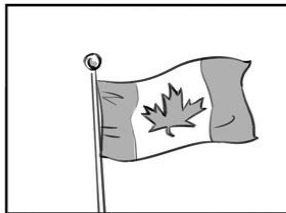
SCÈNE 1 : Une enfant se tient debout sur l'estrade lors d'un concours d'épellation.

« La compétition nous donne des sœurs froides. »



SCÈNE 5 : Des étudiants universitaires font des recherches à l'aide de leur téléphone intelligent.

« Chaque jour, les Canadiens travaillent pour réussir, »



SCÈNE 9 : Drapeau canadien battant au vent sur la colline du Parlement. Zoom arrière révélant la Tour de la Paix. « Les entreprises du sans-fil ne devraient-elles pas faire la même chose? »



SCÈNE 2 : Une triathlète franchit avec peine les derniers mètres de la course.

« Elle façonne notre caractère. »



SCÈNE 6 : Un travailleur de la construction parle au cellulaire et hoche la tête.

« pour obtenir du travail, »



SCÈNE 10 : Zoom arrière révélant le Parlement. « C'est pourquoi le gouvernement du Canada s'emploie à accroître la concurrence dans l'industrie du sans-fil. »



SCÈNE 3 : Un haltérophile canadien participant aux Jeux olympiques spéciaux soulève la barre de façon triomphale.

« Elle nous rend plus forts. »



SCÈNE 7 : Plan rapproché d'une tablette avec le visage du médecin dans une petite fenêtre. Zoom arrière permettant de voir une radiographie dans la grande fenêtre et une main tenant la tablette.

« pour apporter leur contribution, »



SCÈNE 11 : Fondu au graphique du Parlement avec le slogan « Plus de choix. Des prix plus bas. De meilleurs services. » et le lien [Canada.ca/plusdechoix](http://Canada.ca/plusdechoix).

« Une saine concurrence est avantageuse pour tous : pour les consommateurs, pour les citoyens et pour notre pays. »



SCÈNE 4 : Le but de Henderson lors de la Série du siècle entre le Canada et l'URSS.

« La compétition nous fait repousser nos limites. Les Canadiens le savent très bien. »



SCÈNE 8 : Perspective inversée montrant un jeune Inuit blessé tenant la tablette, avec son père à ses côtés.

« et pour améliorer la vie des autres. »



SCÈNE 12 : Mot-symbole « Canada » et indicatif sonore.

« Un message du gouvernement du Canada. »

# Communication materials tested

## Television story boards – Choices (English)

CONCEPT 2



SHOT 1: Close up of three identical cell phones in a display.

**"There's been a lot of noise about wireless competition in Canada."**



SHOT 2: Man 1 looks at display.



SHOT 3: Close up of woman opening a cell phone bill.

**"Fact is, Canadians pay some of the highest wireless rates in the developed world."**



SHOT 4: Woman looks at her phone bill.



SHOT 5: Man 2 in a hurry, looking at cell phone.

**"And our largest wireless companies hold over 85% of the airwaves."**



SHOT 6: Phone screen shows hockey video.



SHOT 7: Man looking at his screen.

**"It's time to talk about what's really best for Canadians..."**



SHOT 8: "More Choice" appears. Man 1 agrees.

**"More choice."**



SHOT 9: "Lower prices" appears. Woman agrees.

**"Lower prices."**



SHOT 10: "Better service" appears. Man 2 agrees.

**"Better service."**



SHOT 11: Parliament appears with three previous points and URL.

**"Visit [Canada.ca/MoreChoices](http://Canada.ca/MoreChoices)."**



SHOT 12: Canada Wordmark and sound logo.

**"A message from the Government of Canada."**

# Communication materials tested

## Television story boards – Choices (French)

CONCEPT 2



SCÈNE 1 : Gros plan sur trois téléphones cellulaires très semblables à un comptoir.

« On a entendu beaucoup de bruit au sujet de la concurrence dans l'industrie canadienne du sans-fil. »



SCÈNE 2 : Un premier homme regarde le comptoir.



SCÈNE 3 : Gros plan d'une femme qui ouvre une facture de téléphonie cellulaire.

« Les tarifs des services sans fil au Canada sont parmi les plus chers des pays développés. C'est un fait. »



SCÈNE 4 : La femme regarde sa facture.



SCÈNE 5 : Un deuxième homme pressé regarde son téléphone cellulaire.

« Nos grandes entreprises de services sans fil détiennent plus de 85 % des ondes. »



SCÈNE 6 : L'écran du cellulaire montre une vidéo de hockey en train d'être téléchargée.



SCÈNE 7 : L'homme regarde l'écran du cellulaire.

« Il est temps de parler des véritables intérêts des Canadiens. »



SCÈNE 8 : Les mots « Plus de choix » apparaissent à l'écran. Le premier homme est d'accord.

« Plus de choix. »



SCÈNE 9 : Les mots « Des prix plus bas » apparaissent à l'écran. La femme est d'accord.

« Des prix plus bas. »



SCÈNE 10 : Les mots « De meilleurs services » apparaissent à l'écran. Le deuxième homme est d'accord.

« De meilleurs services. »



SCÈNE 11 : Le Parlement apparaît avec les trois points précédents et l'URL.

« Visitez [Canada.ca/plusdechoix](http://Canada.ca/plusdechoix). »



SCÈNE 12 : Mot-symbole « Canada » et indicatif sonore.

« Un message du gouvernement du Canada. »



# Communication materials tested

## Radio script – Noise (English)

**AS RECORDED ON 11/11/13**

**Government of Canada  
Wireless Policy Campaign**

**1 X 30 sec.**

**Concept 1 “noise”**

**Intro:                   Sound of Static**

### **ANNR:**

- There's been a lot of noise about Canada's wireless industry.
- The fact is Canadians pay some of the highest wireless rates in the developed world.
- And our largest wireless companies hold 85% of the airwaves.
- It's time to talk about what's *really* best for Canadians for a change.
- More choice. Lower prices. Better service.
- Visit [Canada.ca/More Choices](http://Canada.ca/More Choices)
- A message from the Government of Canada

# Communication materials tested

## Radio script – Statique (French)

**AS RECORDED ON 11/11/13**

**Gouvernement du Canada**

**Campagne sur la politique du sans-fil**

**1 X 30 sec.**

**Concept 1 “statique”**

**Intro : le son de statique**

### **ANNONCEUR:**

- On parle beaucoup de l'industrie du sans-fil au Canada.
- En fait, les taux des services sansfil payés par les Canadiens sont parmi les plus élevés des pays industrialisés.
- Et nos plus grandes entreprises de sans-fil détiennent plus de 85% des ondes.
- Parlons dans l'intérêt des Canadiens pour une fois.
- Plus de choix, des prix plus bas, de meilleurs services.
- Pour plus d'info, visitez le site : [canada.ca/plusdechoix](http://canada.ca/plusdechoix)
- Un message du gouvernement du Canada

# Communication materials tested

## Radio script – Rules (English)

**AS RECORDED ON 11/12/13**

### **Government of Canada Wireless Policy Campaign**

**1 X 30 sec.**

#### **Concept 2 “rules”**

- Some of Canada’s wireless companies say the Canadian government has special rules that favour foreign wireless companies.
- But there are no such rules.
- In fact the rules in place today were developed through years of public consultations.
- While Canada’s wireless companies represent their interests, the Government of Canada is here to represent the interests of all Canadians.
- More choice. Lower prices. Better service.
- Visit [Canada.ca/MoreChoices](http://Canada.ca/MoreChoices)
- A message from the Government of Canada

# Communication materials tested

## Radio script – Règles (French)

**AS RECORDED ON 11/12/13**

**Gouvernement du Canada**

**Campagne sur la politique du sans-fil**


**1 X 30 sec.**

**Concept 2 “règles”**

- Certaines entreprises canadiennes du sans-fil disent que le gouvernement du Canada a des règles spéciales qui favorisent les entreprises étrangères du sans-fil.
- De telles règles n’existent pas.
- Les règles actuellement en place ont été élaborées après plusieurs années de consultations publiques.
- Les entreprises canadiennes du sans-fil défendent leurs intérêts, mais le gouvernement du Canada défend les intérêts de tous les Canadiens.
- Plus de choix. Des prix plus bas. De meilleurs services.
- Visitez [Canada.ca/plus de choix](http://Canada.ca/plus de choix).  
Un message du gouvernement du Canada

# Communication materials tested

## Print ads

 Government of Canada  
Gouvernement du Canada

## Canada's Wireless Policy:



**More choice.  
Lower prices.  
Better service.**

There's been a lot of noise about Canada's wireless industry.

Some of Canada's wireless companies say the Canadian government has special rules that favour foreign wireless companies.

But there are no such rules.

The fact is Canadians pay some of the highest wireless rates in the developed world.

And our largest wireless companies hold 85% of the airwaves.

Less noise. More facts.

Visit **Canada.ca/MoreChoices**

**Canada**

concept 2.2

 Gouvernement du Canada  
Government of Canada

## La politique du Canada sur le sans-fil :



**Plus de choix.  
Des prix plus bas.  
De meilleurs services.**

On parle beaucoup de l'industrie du sans-fil au Canada.

Certaines entreprises canadiennes du sans-fil disent que le gouvernement du Canada a des règles spéciales qui favorisent les entreprises étrangères du sans-fil.

De telles règles n'existent pas.

En fait, les taux des services sans-fil payés par les Canadiens sont parmi les plus élevés des pays industrialisés.

Et nos plus grandes entreprises du sans-fil détiennent 85% des ondes.

Moins de rumeurs, plus de faits.

Visitez **Canada.ca/PlusDeChoix**

**Canada**

concept 2.2 F.