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BANK OF CANADA PROJECT VICTORY DESIGN CONCEPT FOCUS GROUPS (QUALITATIVE) RESEARCH REPORT

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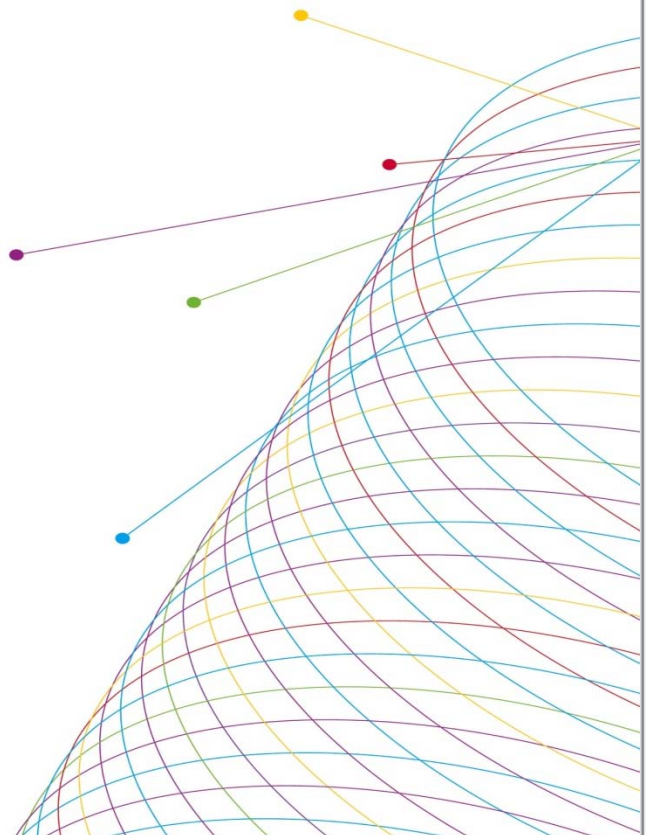


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EXECUTIVE SUMMARY

Nielsen is pleased to present this report to the Bank of Canada summarizing the results of the qualitative research exploring design concepts for the Bank of Canada's next bank note.

Project Victory is the name given to the project to research, design, develop, produce and launch this bank note. The note will have a different design from existing Canadian bank notes. These focus groups aimed to gather feedback from Canadians at the concept phase so as to optimise the design of the note, to verify its recognisability, and inform future communications approaches.

To meet these objectives, Nielsen conducted a series of eight focus groups in four cities across Canada: Halifax, NS (April 10, 2017); Montreal, QC (April 12, 2017); Winnipeg, MB (April 18, 2017); and, Vancouver, BC (April 20, 2017). In each city, one focus group was conducted with members of the general population who regularly use cash (cash users); and, one was conducted with those who handle cash as part of their job (cash handlers). The focus groups in Montreal were conducted in French, as was the cash user group in Winnipeg while the rest were conducted in English.

The key findings from the research are presented below.

- **Reaction to the bank note was generally positive.** The majority of participants came away with a sense of (national) pride.
- **The change in orientation was welcome for most participants and seen as an innovative, unique progression in Canadian bank note design.** It was felt to be particularly appropriate for this bank note given that it will mark the first time that an iconic Canadian woman will be featured on a regularly circulating note. The vertical layout also allowed for a larger, more prominent portrait image, which participants liked.
- Some with initially neutral reactions to the orientation attributed their response to an aversion to change (in general). Some expressed concern with facing the new vertical note in their wallets and tills alongside existing horizontal notes. In most cases, their appreciation of the note evolved as the group progressed and participants familiarized themselves with the various design elements and considered the comments / opinions of other participants.
- Participants expressed that future notes issued by the Bank of Canada as part of the next series should also have a vertical orientation for consistency across the series.

- **There was general agreement that the bank note is recognizable as a Canadian bill.** The prominence of Canadian symbols made it identifiable to most participants as a Canadian \$10 note. Furthermore, the design concept's primary colour, purple, is already associated with the \$10 denomination; maintaining this colour contributed to its recognisability.
- **Reactions to the primary images featured on the front and back of the bank note (Viola Desmond and the Canadian Museum for Human Rights) were generally very positive.** While not all participants were familiar with Viola Desmond or the Canadian Museum for Human Rights, both were met with favourable reaction and deemed appropriate to be featured on the new bank note.
- **Even though some participants were unfamiliar with certain elements of the design, the overall theme of the bank note emerged quite clearly.** The primary theme that emerged revolved around rights, human rights, freedom, equality and respect. Participants believed this theme aligns closely with Canadian values and contributes to their sense of pride.

RÉSUMÉ

Nielsen a le plaisir de remettre à la Banque du Canada le présent rapport, qui résume les résultats de l'étude qualitative menée sur des maquettes préliminaires pour le prochain billet de banque de l'institution.

« Projet Victoire » est le nom donné au projet consacré aux recherches préalables ainsi qu'à la conception, à l'élaboration, à la production et au lancement de ce billet de banque. Le billet aura un aspect différent de celui des billets de banque canadiens existants. Ces groupes de discussion visaient à obtenir l'avis des Canadiens à l'étape du concept afin d'optimiser la conception du billet, de vérifier la reconnaissabilité de ce dernier et d'orienter les stratégies de communication qui seront adoptées.

Afin d'atteindre ces objectifs, Nielsen a tenu une série de huit groupes de discussion dans quatre villes du Canada : Halifax, en Nouvelle-Écosse (le 10 avril 2017); Montréal, au Québec (le 12 avril 2017); Winnipeg, au Manitoba (le 18 avril 2017); et Vancouver, en Colombie-Britannique (le 20 avril 2017). Dans chacune de ces villes, on a formé un groupe de discussion composé de membres du grand public qui utilisent régulièrement l'argent comptant (utilisateurs d'argent comptant) et un autre de personnes qui manipulent l'argent comptant dans le cadre de leur travail (caissiers). Les deux groupes de discussion de Montréal se sont déroulés en français, tout comme celui réunissant des utilisateurs d'argent comptant à Winnipeg, alors que les autres ont eu lieu en anglais.

Les principaux résultats de l'étude figurent ci-dessous.

- **Les réactions au billet de banque ont été positives dans l'ensemble.** La majorité des participants sont repartis avec un sentiment de fierté (nationale).
- **La plupart des participants ont bien accueilli le changement d'orientation et l'ont perçu comme une évolution novatrice et unique dans la conception des billets de banque canadiens.** On l'a jugé particulièrement approprié pour ce billet de banque, étant donné que ce sera la première fois qu'une Canadienne emblématique ornera un billet de circulation courante. La disposition verticale a également permis de présenter un portrait plus grand et davantage mis en évidence, ce qui a plu aux participants.
- Certaines des personnes qui ont initialement manifesté une réaction neutre relativement à l'orientation ont attribué leur attitude à une aversion au changement (en général). Certains ont

exprimé des réserves à l'idée de voir le nouveau billet vertical dans leurs portefeuilles et leurs tiroirs-caisses aux côtés des billets horizontaux existants. Dans la plupart des cas, leur appréciation du billet a évolué à mesure que la séance avançait et que les participants se familiarisaient avec les divers éléments graphiques et prenaient note des commentaires et des opinions des autres participants.

- Les participants ont fait valoir que les futurs billets émis par la Banque du Canada dans le cadre de la prochaine série devraient eux aussi être orientés verticalement par souci d'uniformité dans l'ensemble de la série.
- **De l'avis général, le billet de banque est reconnaissable en tant que billet canadien.** La place importante accordée aux symboles canadiens l'ont rendu identifiable aux yeux de la plupart des participants comme un billet de 10 dollars canadien. En outre, la couleur dominante de la maquette préliminaire, soit le violet, est déjà associée à la coupure de 10 dollars. Le maintien de cette couleur a donc contribué à rendre le billet reconnaissable.
- **Les réactions aux images principales figurant au recto et au verso du billet de banque (Viola Desmond et le Musée canadien pour les droits de la personne) ont généralement été très positives.** Même si Viola Desmond ou le Musée canadien pour les droits de la personne n'étaient pas connus de tous les participants, ils ont tous deux reçu une réaction favorable, et leur représentation sur le nouveau billet de banque a été jugée appropriée.
- **Si certains éléments graphiques étaient méconnus de certains participants, le thème général du billet de banque est apparu très clairement.** Le principal thème qui est ressorti tournait autour des droits, des droits de la personne, de la liberté, de l'égalité et du respect. Les participants ont estimé que ce thème correspondait étroitement aux valeurs canadiennes et contribuait à leur sentiment de fierté.

INTRODUCTION

Nielsen is pleased to present this report to the Bank of Canada summarizing the results of the qualitative research exploring design concepts for the Bank of Canada's next bank note.

Project Victory is the name given to the project to research, design, develop, produce and launch this bank note. The note will have a different design from existing Canadian bank notes. These focus groups aimed to gather feedback from Canadians at the concept phase so as to optimise the design of the note, to verify its recognisability and inform future communications approaches. The specific objectives of the research included:

- To collect impressions on the vertical design of the bank note;
- To collect impressions on the new portrait figure on the bank note;
- To validate that the bank note is recognized as a Canadian \$10 bank note;
- To verify that the images used are recognizable; and,
- To determine understanding of the theme of the bank note.

To meet these objectives, Nielsen conducted a qualitative research exercise for the Bank of Canada in April 2017. This research consisted of separate in-person focus groups with both members of the general population who regularly use cash (cash users) and with those who handle cash as part of their job (cash handlers).

A series of eight focus groups were conducted, two in each of the following cities: Halifax, NS; Montreal, QC; Winnipeg, MB; and Vancouver, BC. The groups in Montreal were conducted in French, as was the cash user group in Winnipeg while the rest were conducted in English. The groups were all conducted by the same moderator.

The following table outlines the distribution of the groups in terms of location, date, language, target group (cash users or cash handlers), and the number of people who participated:

City	Date	Language	Target Group	Participated
Halifax	April 10	English	Cash Users	10
	April 10	English	Cash Handlers	10
Montreal	April 12	French	Cash Users	9
	April 12	French	Cash Handlers	7
Winnipeg	April 18	French	Cash Users	9
	April 18	English	Cash Handlers	6
Vancouver	April 20	English	Cash Users	10
	April 20	English	Cash Handlers	9

All sessions were one and a half hours in length beginning at 5:30 p.m. and 7:30 p.m. each evening except in Vancouver where the groups were conducted at 6:00 p.m. and 8:00 p.m. Participants received an honorarium of \$75 in appreciation for their time.

NOTE: For the purposes of this report, it is important to note that focus group research is a form of scientific, social, policy and public opinion research. Focus groups are structured, restricted, group interviews that proceed according to a careful research design and attention to the principles of group dynamics. They should be distinguished from “discussion groups”, “problem-solving groups”, “buzz groups”, or “brainstorming groups”. They are not designed to help a group reach a consensus or to make decisions, but rather to elicit the full range of ideas, attitudes, experiences and opinions of a selected sample of participants on a defined topic. Because of the nature of focus groups (e.g. the impact of group dynamics, a lack of standardization in how questions are asked, etc.), findings cannot be assumed to be quantitative nor representative of the larger population.

DETAILED FINDINGS

ORIENTATION OF THE BANK NOTE

Initial reaction to the vertical orientation was mixed and, generally, neutral in tone (neither strongly in support nor strongly in opposition).

Many participants thought the vertical orientation was an interesting, innovative and unique change that is a natural extension of Canada's already innovative approach to bank note design. The new layout was praised for allowing a bigger portrait, which gives more prominence to the portrait subject; a positive aspect of the design. It was felt to be particularly appropriate with the introduction of this bank note and the significance of the decision to feature an iconic Canadian woman.

Some participants with initially less positive reactions attributed their response to a general aversion to change. Some expressed discomfort with sorting the new vertical notes alongside existing horizontal notes in their wallets (more so than in their tills). It was interesting to observe, however, the positive progression of their views over the course of the discussion as they became more comfortable with the orientation, familiar with the design elements and theme of the bank note, and listened to the comments of other participants in the group. When asked whether the proposed orientation would change the way they handle the note, the response was almost universally "no".

Despite the orientation change, the note was recognizable as a Canadian \$10 bank note. There are a number of visual elements that clearly convey that the bill is Canadian, including: the Canadian flag, the word "Canada" at the top of the bank note, the traditional colour purple used for the \$10 denomination, as well as the maple leaves and the Coat of Arms.

Lastly, the majority of participants felt that the Bank should consider changing the orientation of all denominations if they (the Bank of Canada) proceed with a new vertical layout for the \$10 note for consistency across the series.

FRONT OF THE BANK NOTE

Reaction to the front of the bank note was generally positive.

The portrait subject, Viola Desmond, features very prominently on the note. As mentioned previously, participants reported that the vertical orientation of the note frames her portrait well and the image selected for Desmond was felt to be appropriate.

While not all participants, particularly outside of Halifax, were familiar with Desmond, the fact that a prominent Canadian woman would be featured on a regularly circulating bank note for the first time was very well received. Participants were intrigued and curious to learn more about her.

The archival map of Halifax was not always immediately recognizable, although at least one participant in each group identified it as Halifax, with the Citadel, wharfs and waterside location being distinguishing features. Even though most participants (even some residents of Halifax) did not identify the city by name, the majority of participants did recognize that this design element was a map. It was most often described as a map depicting Canadian landscapes or topographical features such as: rural and urban settings; coastal settings (i.e., ports, quays, water, etc.); parcels of land (i.e., agriculture, rural settings); and, trees (i.e., forests).

BACK OF THE BANK NOTE

Reaction to the back of the bank note was also generally positive. The back of the bank note was seen to include several design elements that were effective in conveying the overall theme of the bank note.

The Canadian Museum for Human Rights was well recognized in Winnipeg, but less so in other cities. The decision to feature the museum was felt to be very appropriate by the majority of participants. Participants across all cities were interested to know there was such a museum in Canada, which contributed to the sense of pride they felt toward this design. The name of the museum is included on the design concept for the back. For participants who were not familiar with the museum, the inclusion of the name helped to provide guidance on the nature of the institution.

Participants reacted positively to the excerpt from the Canadian Charter of Rights and Freedoms and noted how it helped to express the overall theme of the bank note.

Reaction to the alabaster ramps (of the Canadian Museum for Human Rights) was generally neutral. Participants outside of Winnipeg did not recognize this design element as a staircase or ramp, although when asked to describe what they saw, it was most often described as industrial-looking, walls, steel beams, infrastructure, etc., or a general design element. When asked to articulate their interpretation of this design element, participants linked the structure to support, holding, connecting, and bridging communities and people.

APPLIED FEATURES

The eagle feather was recognized as such by many participants. Most participants were able to link it to First Nations or Indigenous peoples and felt it was a positive element on the note. Some thought it might be a pen or quill used to sign the Charter (especially given its placement next to the excerpt from the Charter of Rights and Freedoms). It was linked to the idea of freedom, liberty, peace, etc.

The laurel branch was not consistently identified. Some participants did recognize it as a laurel or olive branch, and felt that it was linked to the idea of peace which worked well with the overall theme of the note and Canada's reputation as a country. Other participants thought it was wheat and a reference to Western Canada (especially given its placement next to the Canadian Museum for Human Rights which is in Winnipeg). Reaction to it was generally neutral.

The Coat of Arms of Canada was easily identifiable by the majority of participants across all groups. Participants reported that it conferred to the bank note a sense of authenticity and authority.

The maple leaves and flag of Canada were both seen as features that helped make this note clearly Canadian.

The ceiling and copula from the Library of Parliament was less identifiable. Some participants extrapolated that it was an architectural feature from Parliament Hill. Many reported that the feature resembled a wide range of other items, or was simply an abstract security element. Reaction to it was generally neutral.

THEME RECOGNITION

When considering the bank note in its entirety (both front and back), the theme that emerged most frequently among participants in all cities related to: rights, human rights, justice, equality and respect. Along these lines, a secondary theme that emerged was related to acceptance of diversity and inclusion; both of which were felt to be closely aligned with uniquely Canadian values. The latter was strongest among those familiar with Viola Desmond and her story.

For some participants, the inclusion of images from different time periods prompted a linkage between the past and present, conveying the notion of change and progress over time.

