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Dear Subscriber,

We are pleased to offer a subscription to Canada's first comprehensive syndicated bi-annual study of Canadian Millennials (those born between 1980 and 2000). As detailed in the attached product sheet, Abacus Data's *Canadian Millennial Report* will provide valuable insights to the subscribers on the largest cohort in the Canadian population.

Because Millennials were raised in a fast-paced, technology and media immersed society where self-esteem and positivity was reinforced in the education system, they operate in a different way from the generations of citizens, employees, and consumers that came before them. However, this does not mean that all Millennials have had the same experience. Canada's Millennials come from a plethora of ethnic, social and cultural backgrounds, making them one of the most diverse groups in the population. Within the next few years, Millennials will become the largest segment of working aged Canadians and the primary tax paying generation: their behaviour is already shaping consumer, employment, and public affairs trends.

While previous studies focus on Canadian youth, our studies track this generation over time; capturing changes in attitudes and behaviour by tracking responses to important issues. Concurrently, each report will delve into different themes that correspond to subscriber interests and input, allowing significant flexibility with our service. Our study also segments the population into different groups, understanding how these different groups think and act about public policy priorities, communication, media consumption, personal finances, and civic engagement.

Established in 2010, Abacus Data is recognized as the authoritative voice on Canadian Millennials. We have conducted Millennial generation studies for clients such as the Canadian Business Council, the Canadian Alliance of Student Associations, the CBC, the Huffington Post, and the Globe and Mail and have tracked the attitudes and behaviours of this generation for almost six years.

We know from our research that Millennials are engaging with business, government, and society in a profoundly different way. Evidence from the last federal election indicates that

more young people voted and engaged in politics. But if organizations are to better connect with this generation, it must understand how they communicate, what their priorities are, and how they assess their own lives. Through the *Canadian Millennial Report*, subscribers will gain a nuanced understanding of Canadian Millennials that will offer insights into the priorities, evaluations, and attitudes of Canada's largest generation.

Sincerely,



David Coletto
CEO

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The Canadian Millennial Report

Abacus Data is pleased to offer the *Canadian Millennial Report*, a syndicated study that answers the most important questions surrounding Canada's Millennial generation. Covering subjects ranging from media consumption to life satisfaction and perceptions on policy initiatives, the *Canadian Millennial Report* is the first syndicated study in Canada to explore and track the attitudes and behaviour of Canadian Millennial issues.

The first new wave of research will begin in fall 2016 (October). Going forward, a new wave will be conducted each spring (April) and Fall (October), to allow for the most current data to be included in the final materials.

As Abacus Data has been conducting detailed data nationally and provincially across Canada for nearly six years, we have had a long-term opportunity to hone and focus the question style and delivery. Because of this experience, we are already equipped to provide maximum value for dollar in terms of questionnaire design, understanding issues of central relevance, and framing and interpreting collected data to generate actionable recommendations.

Core Subject Areas

The *Canadian Millennial Report* examines the attitudes and behaviours of Canadian Millennials in a wide variety of areas. Specific study areas will include but are not limited to:

- **Communication.** Thanks to the rise of telecommunications, mobile connection, and social media, young Canadians have never had a more diverse choice of communication technologies to interact and engage with. The study will track the use of telecommunication services (TV, mobile, internet) as well as device ownership, social media use, and OTT streaming services. This section will help subscribers understand how best to reach Millennials and what telecom and social media platforms they are using.

- **Media Consumption.** Young people are increasingly moving away from traditional channels of media consumption such as TV, radio, and print towards downloading and streaming almost all content online. The rise of Facebook, Instagram, SnapChat, and Twitter as the primary source for news content is a sharp contrast to older generations. Not only are Millennials passive news consumers (they interact with what they see on their social media feeds) but they self-curate their information sources leaving many isolated from current affairs and government information. The study will examine where and how Millennials get their news about current affairs so that subscribers understand how to inform and engage them.
- **State of mind.** Our experience shows us that Millennials are resilient and remain optimistic despite the economic challenges they face. The study will explore the state of mind of the generation including their satisfaction with life, what they are optimistic about, what they worry about, and what their top personal priorities and concerns are.
- **Public Policy Priorities.** The study will track the specific policy priorities of the generation. It will provide a comprehensive look at policy priorities around employment and training, housing, the environment, climate change and energy policy, tax policy, health policy, energy policy, and justice issues.
- **Reactions to Policy Initiatives.** The study will also measure Millennials' reactions to the policy initiative areas identified above and alternatives, as well as the effectiveness of government programs and services and communications.
- **Financials & Housing.** Housing affordability, employment stability, and family finances are key issues for this generation. The study will track perceptions about these issues and focus on the demographic and regional differences in responses.
- **Perceptions on Economy.** How optimistic or pessimistic are Millennials about the job market? How do they feel about job opportunities in their area? How do they compare their economic experiences to that of older generations? The study will explore how Millennials feel about the current and future economic circumstances

Along with the Core Questions, each wave of research will feature a new topic, unique to that wave of research that will be informed by current events, changing circumstances, and subscriber input.

To create these new, topical, waves, Abacus Data will draw on our extensive experience across both Millennial and public affairs research, once again reducing turnaround time, and maximizing the value for dollar presented in all reports.

The *Canadian Millennial Report* will include a detailed PowerPoint deck with a corresponding written summary that presents the connection between Millennials' concerns as citizens to provide overarching and comprehensive insight into how Millennials think, feel and act. Most important, the report tracks opinion and behaviour over the generation's development and evolution.

As a value-add to the report, Abacus Data is proud to offer our clients a breakdown and analysis of results through *YSegmentation*, a proprietary segmentation model that identifies 14 character and personality traits that we believe best differentiate our peers. Using these traits and our years of

research experience, we performed cluster analysis and produced what we believe are six unique Canadian Millennial segments or groups that share similar personalities, outlooks, and traits.

Moreover, further segmentations will be provided based on demographic, regional, psychographic, and behavioural categories as they related to public affairs, life stage, language and cultural background, and socio-economic status.

Target populations

The *Canadian Millennial Report* will sample 2,000 Canadians born from 1980 to 2000. Those born in this range will be tracked over time as a longitudinal study. We believe that the Millennial generation is the most important and influential cohort to arise in Canada since the Baby Boomer generation; their influence on the Canadian landscape needs to be tracked and measured for many years to come.

The regional distribution of the sample will ensure that appropriate regional analysis is possible but the data will be weighted to match the population of Millennials according to census data.

Methodology

As a result of changing technology, survey research methodologies have evolved in the past five years. While telephone research was dominant for the later part of the 20th century, for the last five years online research has emerged as the top mode for collecting survey data in the market research industry.

Both telephone and online research modes have limitations. Declining response rates, increased call screening, and the growth of cell-online households has meant random telephone surveys are more difficult and expensive to conduct. Both modes have coverage issues: those who do not have access to the internet are excluded from participating in online studies while those who rarely answer the phone, or screen their calls, are missed in telephone studies (this is especially true of younger Canadians).

Online research solves some of the coverage issues with younger and lower income respondents.

The *Canadian Millennial Report* will recruit its sample from a number of online, opt-in panels and will use quota sampling and post-stratification weighting to match the sample to Canada's population by gender, age, region, official language, and education.

Abacus Data is a leader in Canada when it comes to conducting online research of the general public for public affairs research. Since 2010, we have used online survey methods for over 200 projects including our monthly gen pop omnibus survey.

Knowing the limits of non-probability based samples for online research, to produce a high quality and representative sample of the population under study, we follow the following procedures:

1. We procure sample from only the best sample providers. For this study we will rely on Research Now, yConic, and LegerWeb for their panelists.
2. We program and host the survey in-house. This allows us to ensure the highest quality of respondent experience producing better quality data. Our primary tool for conducting online surveys is Fluid Surveys for which we have an enterprise edition. All data collected by Fluid Surveys is stored on secure servers located in Ottawa, Ontario.
3. We incorporate design features and data quality controls throughout the survey instrument. Recognizing that some opt-in panel members simply fill out surveys for the incentives, we regularly include a number of quality controls in our online quantitative designs including tests within the questionnaire, completion timing minimums (if a respondent completes the survey too quickly we discard the response), and removing any respondents who have completed more than three surveys in the past two weeks (this helps remove professional survey takers).
4. We design questionnaires that put the respondent at the center of the process. When designing surveys we always think about how the respondent will react and ask ourselves questions like: Is the matrix too large? Is the survey too long? How would the respondent feel if asked that question? This ensures that the quality of the data and the completion rates of our surveys remain high.
5. We place interlocking quotas on the sample to ensure that samples of sub-populations (region, age groups, etc) are as representative of the population as possible. This helps ensure that the estimates produced within sub-populations are as representative as possible.
6. All of our results are presented as weighted to be representative of the Canadian population and non-weighted.

Together, these steps combine to allow Abacus Data to provide reliable, detailed, and rigorously collected public opinion data we can present with confidence in accuracy, and to deliver these results at a dramatically reduced cost when compared to traditional telephone research. Moreover, we feel that telephone surveys are not an effective way of conducting research of younger Canadians. Most only own a mobile phone and few answer the phone if they do not know who is calling. Without an incentive, the response rate is very low impact data quality and representativeness.

The *Canadian Millennial Report* syndicated study will be composed of around 60 questions, in both English and French, and take approximately 30 minutes for participants to complete. This will allow all survey subjects to be explored comprehensively and answered accurately by participants.

Demographic questions in the study include:

- Gender
- Age
- Household size
- Educational attainment
- Household income
- Personal income
- Employment status
- Educational enrollment
- Union membership
- Occupation
- Official languages spoken
- Primary language

The study is administered bi-annually. This allows us to track Millennial attitudes over a significant period of time to compare changes and highlight patterns and trends within the generational cohort and add new insights through thematic modules as issues arise.

Sample Plan

Canadian Millennial Report surveys a nationally representative sample of Canadian Millennials between the ages of 16 and 35. A total of 2,000 young Canadians will be surveyed as part of this study.

The proposed regional breakdown for the sample is:

Province	Sample Size
Atlantic Canada	200
Quebec	500
Ontario	500
Saskatchewan/Manitoba	200
Alberta	200
British Columbia	400
Total	2000

The proposed breakdown between the age groups for the first study is detailed below. Future studies will shift the age range to align with the Millennial cohort's 1980 to 2000 birth years.

Age Break	Sample Size	Margin of Error (19 times out of 20)
16–20	500	4.4%
21–25	500	4.4%
26–29	500	4.4%
30–35	500	4.4%

Deliverables

As a research boutique firm specializing in public affairs and generational research, Abacus Data's primary interest is providing our clients with top-notch service, quality, and accurate results. Our small size allows our firm to be intimately involved in the projects we work on, and to provide these services at extremely competitive prices. We look forward to going the extra mile to provide added value to every client we work with, and tailoring deliverables to meet each individual need.

Abacus Data is very flexible in providing diverse forms of analysis to meet our clients' needs. Subscribers will be given a detailed PowerPoint deck along with an accompanying written summary in both official languages. Subscribers will also receive detailed tables for all questions in the study.

Abacus Data is also pleased to provide *Canadian Millennial Report* syndicated study clients with a unique presentation of client-focused results and analysis for every wave of the study – in person or webinar style. This presentation will be conducted by Dr. David Coletto, CEO of Abacus Data, after each wave of the syndicated study (2 waves per year). Dr. Coletto's presentations will be conducted "live" and we request that no recordings or reproductions of the presentations be made by clients. Subscribers also have the option of requesting supplementary presentations at additional cost.

Subscription Limitations

Subscribers agree not to share the report publicly or with anyone not employed by the subscriber for a period of 3 years after the report has been published.

The report will be password protected and available to employees of the subscribing organization.

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