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Finance canada

2017 focus groups on the economy (qualitative)

Research Report

prepared BY: ACNielsen company of canada

prepared for: finance canada

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

***For more information on this report, please contact:*** [finpub@fin.gc.ca](mailto:finpub@fin.gc.ca) or 613-369-3710

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# **Table** **of Contents**

[**Executive Summary** 1](#_Toc478720543)

[Objectives 1](#_Toc478720544)

[Methodology 1](#_Toc478720545)

[Key Findings 3](#_Toc478720546)

[**Detailed Findings** 5](#_Toc478720547)

[Budget Impressions: Perception Analyzer 5](#_Toc478720548)

[Overall Impressions 5](#_Toc478720549)

[Elements of the Plan 5](#_Toc478720550)

[Pre and Post-Budget Assessment 9](#_Toc478720551)

[**Appendix A: Recruitment Screener** 12](#_Toc478720552)

[**Appendix B: Discussion Guide** 19](#_Toc478720553)

# **Executive Summary**

Nielsen is pleased to present this report of research findings to Finance Canada.

## Objectives

The purpose of this research initiative was to explore Canadian’s reactions to the budget speech and to gauge its effect, as well as the measures contained within it. This research included Qualitative (focus-groups) components using perception analyzers which were held simultaneously in Québec and Ontario.

The total contracted value of the research was $55,758.51 (without HST).

## Methodology

Nielsen conducted a qualitative research program for Finance Canada in March 2017. This research included focus groups using hand-held Perception Analyzer® technology and were held simultaneously in Québec and Ontario. This approach was in line with Finance Canada’s expectations, and identical to the methodology used to conduct this research in 2016.

The focus groups were conducted with members of the general population in Toronto, ON and Montreal, QC. One maxi-group was conducted in each city on March 22, 2017. The group in Montreal was conducted in French and the group in Toronto was conducted in English. Both groups were three hours in duration. Thirty-five people were recruited and confirmed, aiming for 25 to 35 participants, with a roughly representative mix of age, gender, income and education. In order to qualify, participants needed to be able to communicate effectively in English/French, have no physical barriers to watching and commenting on the presentation and not have participated in the other focus groups of a similar nature recently. In 2017, there was no requirement that participants be one of the decision makers for their household, a change from the 2016 screening criteria. All participants received an honorarium of $125 in appreciation for their time. Sessions were conducted from 3:30pm to 6:30pm.

The focus groups followed a four part format. The focus groups began with participants using Perception Analyzer® technology to respond to 20 closed-ended questions to gauge their baseline perceptions of the state of the Canadian economy and other issues (as well as gather demographic details). Participants then watched the federal budget announcement and used a Perception Analyzer® dial with a 0 to 100 scale (with baseline “neutral” at 50) to rate their positive and negative reactions to federal budget. Following this, participants used the Perception Analyzer® technology to answer 18 closed-ended questions (many of which were the same as the baseline questions) to see how the budget impacted their view of the state of the Canadian economy and other issues. The focus groups ended with a discussion of participants’ impressions of the federal budget.

The Perception Analyzer® technology allows participants to instantly, anonymously respond or react to any stimulus or question. Essentially, each focus group participant is given a hand-held dial that relays his or her responses to an interface connected to a PC. In turn, this demonstrates viewers’ second by second reactions to, or rating of, an audio or video stimulus. This recording, created in real time while participants are providing their reactions, not only helps to graphically demonstrate what aspects of a stimulus are strengths and weaknesses, it provides an important tool for probing opinion on reactions to the stimulus. Areas where some respondents suddenly move the aggregate ratings up or down can be further probed to understand the reasoning behind the reactions.

The following table summarizes the specifics of the project:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **City** | **Date** | **Language** | **Gen Pop Groups** | **Recruited** | **Participated** |
| Toronto | March 22 | English | 1 | 35 | 26 |
| Montreal | March 22 | French | 1 | 35 | 28 |

Appended to this report are the recruitment screeners (see Appendix A) and discussion guides (see Appendix B) in both official languages.

*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 representative of the larger population.*

## Key Findings

Outlined below are the key findings from the research.

* **The reaction to the federal budget speech was generally optimistic.** Participants felt that the budget was positive and included support in a number of much needed areas. Expectations of the budget among participants before it was read were neutral, but reactions after the speech had shifted positively. A slim majority felt that it either met or exceeded their expectations, but there was a sizeable group that felt it did not meet their expectations. Few provided examples of areas that they expected to be addressed, but were not. Generally, the federal budget:
  + Provided a sense of positive movement;
  + Conveyed a sense of fairness; and
  + Focused on areas that most participants considered priorities.
* **Overall, participants were cautiously optimistic in their overall impressions of the federal budget.** Though reactions to the initiatives introduced were favourable, concerns were expressed by some that certain measures did not move fast enough or invest enough resources to make a real difference in some important areas (*e.g.* affordable housing, child care). There was also the concern that the speech used too many ‘buzz words’ such as “middle class” without providing enough details and figures about exactly what this would mean for people. While the initiatives were well-received, others also pointed out a concern for increasing federal debt and skepticism about ‘how they will pay for these investments.’
* **The most popular measures were ones that promoted opportunity and fairness.** The most positively received single measure revolved around tax fairness and ensuring that every Canadian pays their fair share of taxes. Others involved providing tax credits and Employment Insurance benefits for people taking care of elderly or disabled people and providing opportunities for people who have lost their jobs to receive training and education. The most well-received aspect of the innovation focus was the promise that Canada could be a leader in innovative sectors which would provide employment. Measures to promote gender equality were also well-received and well-recalled, especially among women.
* **Other measures received lukewarm reactions.** The plans for a national artificial intelligence strategy, Canada 150, the new defence plan, the pan-Canadian framework on clean growth and climate change and rail improvement projects in Montreal and Vancouver were not negatively received, but they did not stand out among the other contents of the speech.
* **The majority felt the country was moving in the right direction in the long-term, but were more cautious in their assessment of the current economy.** Most participants had the impression that the economy will stay the same in the near term although a sizeable group believe it will actually get weaker over the next six months.
* **Questions about specific aspects of the economy asked before and after the speech revealed a positive view of the government broadly, but many didn’t see the personal benefit.** In most cases, agreement with statements about how well the government is performing on different aspects of the economy increased substantially after hearing the speech, but with questions about participants’ personal economic situation, agreement barely increased. Some participants felt that the measures in the budget will help others, but did not see how they will help them personally in the short term.

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*I hereby certify as a Representative of* ***ACNielsen Company of Canada*** *that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, and standings with the electorate or ratings of the performance of a political party or its leaders.*



Mario Caceres, Business Manager

ACNielsen Company of Canada

March 31, 2017

# **Detailed Findings**

## Budget Impressions: Perception Analyzer

### Overall Impressions

To measure reactions during the speech, participants were given a “dial” that ranges from 0 to 100 where 50 was neutral, and were encouraged to turn it “up” when heard something that resonated with them, and “down” when they heard something that did not resonate or was not seen as credible.

In both cities, the real-time data revealed a broadly favourable impression of the speech. Numbers reached 75-80 on the 100-point scale on several occasions throughout the speech, and usually hovered around the low to mid-60s for much of the time. However, the post-speech discussions in both cities hinted at some level of suspicion about politics and government in general. There was also concern about how the new measures would be funded with some participants mentioning rising federal debt levels.

Participants were generally cautiously optimistic about the federal budget announcement. For the most part, the speech was described positively, with descriptors such as “hopeful”, “optimistic”, “positive”, “promising” and “great” used. There were some negative characterizations of the speech in terms of some people feeling that it relied too strongly on “buzz words” and some terms that are not well defined such as “innovation” and “middle class.” In addition, some wondered if, and how, measures announced would actually be implemented, while others mentioned that spending on some elements was too long term (“spending over 10 years”).

Nonetheless, many in the groups indicated that, regardless of what they thought about the government, many of the areas targeted for additional funding were very worthy of attention, particularly those related to affordable housing, Indigenous peoples, health care and child care. Moreover, most participants felt that the Government of Canada has a good understanding of the key challenges and trends in the economy.

### Elements of the Plan

There were some elements of policy that resonated most strongly in these groups:

* **Tax fairness.** Understandably,Canadians agree that they expect a fair tax system. This was the highest peak of the speech, regardless of gender or location. There was a very positive reaction with the announcement of taxing the richest 1% more in order to cut taxes for the middle class, cracking down and closing loopholes, and paying your fair share of taxes. While there were very positive reactions towards tax fairness, there were many questions surrounding how this will be achieved.
* **Tax relief for caregivers.** There was also a very positive response to providing tax relief to caregivers of elderly people and Canadians with disabilities. Support was especially strong for those who reported having a below average income, and conversely, was lowest among those who said they had an above average income.
* **Investment in innovation.** The mention of six specific economic sectors in which the government is investing was well-received. Agreement was high with the Minister’s statement that “Canada can’t afford not to be a world leader” in these sectors. This sentiment was well-received among every single subgroup, but those with a university education or higher were the most receptive.
* **Continued health care investment.** This is an area that participants were pleased to see a continued focus, especially with mention of providing mental health support and support for caregivers, as mentioned above. In Montreal, some people were concerned about how federal plans would be enacted in Quebec.
* **Child care spaces/Canada Child Benefit.** For participants that this would directly impact, especially women, the addition of affordable child care spots and the Canada Child Benefit were viewed positively. There was a strong positive reaction toward investment in the creation of new child care spaces. It is worth noting however, that Canadians without children did see themselves at a disadvantage, as they saw the budget as having a strong focus on families. Others pointed out that 40,000 new child care spaces did not seem enough for the high level of need.
* **Affordable housing.** Affordable housing was seen as vitally important by the group participants, especially in Toronto. Live reactions to the speech showed that the announcement of a plan for a national housing strategy (and the investment of $11B) was positively received. Some were concerned about whether this would be enough to really affect housing costs, though and skepticism was higher in Toronto. Directly after the announcement, when the Minister mentioned the government having already ‘shown leadership on affordable housing,’ reactions in Toronto turned more negative.
* **Ensuring a higher quality of life for Indigenous people.** There was a positive response to all mentioned actions including providing clean water (lifting boil water advisories), combating substance abuse and providing a higher overall quality of life on reservations.
* **Free National Parks in 2017.** Reactions towards free access to all National Parks in 2017 was quite positive and the majority of participants fully supported this initiative. Some concerns were raised that this could lead to overuse of the parks and that although admission is free, some fees still applied (camping fees, etc.).
* **Investing in skills training/jobs.** Focusing on preparing Canadians for future jobs received a positive reaction. Hands-on learning, developing skills for career advancement and creating good middle class jobs were viewed positively overall. However, there seemed to be some concern in Montreal about how the federal programs would interact with education programs in Quebec.
* **Gender equality.** When gender equality was mentioned, men were somewhat more likely to give neutral reactions compared to woman who reacted quite positively. Women in tech jobs and women in STEM (Science, Technology, Engineering and Math) were positive mentions in Toronto.
* **Clean growth economy.** There were positive reactions overall to various references to investing in clean technology and responsible energy development, especially when linked to making Canada a leading supplier of energy in the future.

There were some elements that received mixed reaction or had more neutral ratings:

* **Specific innovations.** Self-driving cars, genetics, artificial intelligence, e-commerce platform and digital technology elicited some downward movement when specifically mentioned by name despite a positive view of innovative technologies as a concept (especially in Toronto). That being said, digital technology was noted in the discussion as one of the main takeaways from the federal budget announcement.
* **Canada 150.** Reactions were fairly neutral until mention of the free access to National Parks in 2017. Exactly what Canada 150 entails is not well understood, and while participants believe it may encourage tourism, it was really just conceptualized as a “buzz word.”
* **Defence plan.** The announcement of an upcoming new defence policy did not garner a strong reaction - neither positive nor negative.
* **Pan-Canadian framework on clean growth and climate change.** In both cities, participants expressed muted reactions, but the framework was not a top-of-mind concept and there were no sizeable reactions to it or differences among cities, gender or age groups.
* **Strategic partnerships.** When discussing Canada/United States relations and developing strategic partnerships, participant reaction was fairly flat with no change among city or gender. There was a slight positive movement among some subgroups when CETA (the Canada-European Union Comprehensive Economic and Trade Agreement) and the EU were mentioned, and later discussion indicated that this was because of the possibility of a weaker relationship with the United States in the future.
* **Rail development in Montreal and Vancouver.** When rail developments were mentioned in Vancouver and Montreal, reactions were quite stationary. Even participants in Montreal did not peak at the mention.

The results in Toronto and Montreal were very similar when compared to each other with reactions to individual elements mirrored in each location. The differences were relatively minor, but Toronto was more negative when the speech mentioned the following elements: innovative technologies such as self-driving cars and the pan-Canadian artificial intelligence strategy, the government’s past leadership on affordable housing (as opposed to the announcement of spending on an affordable housing plan, which was positively received in Toronto), funding for Indigenous communities, international aid, the new defence policy and free access to National Parks. There were no clear areas where the group in Montreal was more negative about aspects of the speech than in Toronto.

Comparing the results of men and women while watching the speech revealed that there were no major differences in terms of what aspects of the budget they viewed positively or negatively with both of the positive/negative trend lines moving in roughly the same pattern for almost all of the speech. The only consistently noted difference was that women were generally more positive throughout the speech with a baseline score which was usually in the high 60s while men tended to be in the low 60s. There were some specific differences on various elements of the speech, however, with men having more negative scores relative to women during talk of the “middle class,” the Canada Child Benefit, Canada 150, when talking about specific innovations (especially with reference to MS research) and Indigenous issues. The most sustained and noticeable gap came during the section about explanation of the women entrepreneurship and the gender statement for budget measures. The only places where men were more positive than women were measures about job training and affordable housing, although the differences were slight.

When examining the different age groups (Under 30, 31-49 and 50+) it is worth noting that while there are some noticeable differences, generally speaking, the three groups tended to report positive and negative shifts at roughly the same time - differences were mainly the result of the intensity of their shifts. The youngest group, tended to have both the lowest and the highest peaks, while those in the oldest group tended to shift the least from their baseline.

The youngest group was more positive about the Canada Child Benefit, clean drinking water, educational and skills training, affordable housing and gender equality. This group was more negative than the others, however, about artificial intelligence/agri-food and when talking about defence policy. The 31 to 49 age group was more positive than the others on digital technology/innovation and tax fairness (tax avoidance) while they were more negative than other groups on the Canada Child Benefit and "middle class prosperity," affordable housing, gender equality and Indigenous community improvement. Finally, the oldest group was more positive about the statement that "the middle class is falling behind," and Indigenous community improvement than the other groups while there were no clear instances where they were more negative than the others.

The “middle class” referenced at length throughout the federal budget speech, was mentioned in the post-speech discussion in both Toronto and Montreal. Participants indicated confusion surrounding the definition of who the “middle class” is. Solely by perception, participants indicated that while a strong focus was placed on the “middle class”, many do not feel as though they fall into that category. When prompted that “average income” was defined for this project as a household income of $55,000-$75,000, some mentioned that this would not qualify as middle class in a city like Toronto. There was also concern that single income households and Canadians working minimum wage jobs were not able to benefit from investment in the middle class.

Analyzing the results by income group reveals that those who said they have above average incomes were less positive about virtually every aspect of the budget than those who reported average or below average incomes. Those who considered themselves to have a below average income were generally the most positive about the speech. The biggest positive differences between this group and the others were observed around mentions of the Canada Child Benefit, clean energy technology and tax relief for caregivers. For those who reported having above average incomes, the negative gap with the other groups was widest when the speech mentioned the Canada Child benefit, artificial intelligence, providing STEM training, tax relief for caregivers, child care and when the speech touted that "our plan is working" and "we will continue to invest."

## Pre and Post-Budget Assessment

Although the main focus of this research is on the live moment-to-moment reaction to the Minister’s speech, the Perception Analyzer® technology was also used to ask a series of closed-ended questions before and after the speech. This exercise allowed for comparisons between opinions before and after the speech to determine its effectiveness in swaying opinions and to uncover the areas where opinions were not changed substantially. These findings also acted as a starting point for the discussion that provided context for the results.

* **Positive effect of the federal budget announcement on opinions.** Upon comparison of the pre- and post-speech results for a variety of questions, positive ratings increased. This holds true when looking at overall perceptions of the direction of the country and economy at large, as well as for the more specific attitudinal questions. Most participants felt the speech was aimed at regular Canadians then at politicians/economists.
* **There was variation in how people see the direction of the country based on their city.** Even though a majority in both cities saw the country as heading in the right direction, participants in Montreal were more likely to say so than those in Toronto. After hearing the budget speech, however, scores on this measure were higher in both cities, and the gap disappeared.
* **Participants were mostly optimistic about the state of the economy.** Participants in each group generally had a positive impression of the current state of the economy, but again, there was a gap between those in Montreal, who tended to be more positive and those in Toronto. Ratings on this point also increased more in Toronto than Montreal after hearing the speech.
* **Although most participants felt that, in the next six months, the Canadian economy will either be stronger or not change, a sizeable group in Toronto felt it will be worse.** Although around the same small proportion in each city felt it would be stronger, in Montreal, the majority felt it would stay the same, while Toronto participants were split between staying the same and being worse. The speech had a positive effect in both cities, with Montrealers becoming more likely to say the economy will be stronger, whereas in Toronto, people mostly moved from thinking it will be weaker toward thinking there will be no change.
* **While all scores on specific attitudinal measurements increased after the speech, some changed more than others.** The largest increase in scores were related to the government taking steps to help Indigenous people, understanding issues that will affect our economy in the future, improving education and skills training, improving the personal tax system and promoting economic growth.
* **Participants were less swayed by the speech when thinking about their personal economic situation than they were about more national concerns.** Agreement that “the government is pursuing economic policies that will help people like me” and that “the government understands the issues that affect my personal economic situation” was the lowest of all questions posed and also changed the least as a result of watching the budget speech.

# **Appendix A: Recruitment Screener**

Finance Canada

2017 Focus Groups on the Economy Using Perception Analyzers

Recruitment Screener

|  |  |
| --- | --- |
| **Toronto, ON (ENGLISH)**  **Wednesday, March 22**  **Group 2: general pop @ 3:30 pm $125** | Recruit: 35 for 25 to show per group  Honorarium: $125  Study#: ### |
| **Respondent’s name:**  **Respondent’s phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (home)**  **Respondent’s phone #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(work)**  **Respondent’s fax #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_sent?\_\_\_\_\_or**  **Respondent’s e-mail : \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_sent?**  **Sample source (circle): panel random client referral** | Interviewer:  Date:  Validated:  Quality Central:  On List:  On Quotas: |

Hello, my name is . I'm calling from Nielsen, a national public opinion research firm. We are organizing a research project on behalf of the Government of Canada to explore various issues of importance to the federal government. Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais?

We are preparing to hold a few research sessions with people like yourself. In these sessions, individuals are asked to sit down with several others and give their opinions and share their ideas. We are organizing several of these group discussions, and would be interested in possibly having you participate.

Your participation is voluntary and this project is registered with the MRIA. All information collected, used and/or disclosed will be used for research purposes only and the research is entirely confidential. The names of participants will not be provided to the government or any third party. The screening process would take around 5 minutes. May I continue?

Yes 1 **CONTINUE**

No 2 **THANK AND TERMINATE**

First, I would like to ask you a few questions to see if you fit the profile of the type of people we are looking for in this research.

**Note to recruiter: When terminating a call with someone, say: *Thank you for your cooperation. We already have enough participants who have a similar profile to yours, so we are unable to invite you to participate.***

**READ TO ALL**: This call may be monitored or audio taped for quality control and evaluation purposes. May we continue?

|  |  |  |
| --- | --- | --- |
| Yes | 1 | **CONTINUE** |
| No | 2 | **THANK AND TERMINATE** |

|  |
| --- |
| **ADDITIONAL CLARIFICATION IF NEEDED:**   * to ensure that I (the interviewer) am reading the questions correctly and collecting your answers accurately; * to assess my (the interviewer) work for performance evaluation; * to ensure that the questionnaire is accurate/correct (i.e. evaluation of CATI programming and methodology – we’re asking the right questions to meet our clients’ research requirements – kind of like pre-testing). * If the call is audio taped, it is only for the purposes of playback to the interviewer for a performance evaluation immediately after the interview is conducted or it can be used by the Project Manager/client to evaluate the questionnaire if they were unavailable at the time of the interview – all audio tapes are destroyed after the evaluation. |

S1) Do you or any member of your household work in or has retired from:

|  |  |  |
| --- | --- | --- |
|  | **YES** | **NO** |
| Market Research or Marketing | 1 | 2 |
| Public Relations or Media (TV, Print) | 1 | 2 |
| Advertising and communications | 1 | 2 |
| An employee of a political party | 1 | 2 |
| An employee of a federal or provincial government department | 1 | 2 |

**IF “YES” TO ANY OF THE ABOVE, THANK AND TERMINATE**

S2) Are you a Canadian citizen at least 18 years old who normally resides in the [XX] area?

Yes 1 CONTINUE

No 2 THANK AND TERMINATE

S3) How long have you lived in [CITY]? **TERMINATE IF LESS THAN 2 YEARS**

S5) Have you ever attended a consumer group discussion, an interview or survey which was arranged in advance and for which you received a sum of money?

Yes 1 **MAX. ⅓ PER GROUP**

No 2 **GO TO Q1**

S6) How long ago was it?

**TERMINATE IF IN THE PAST 6 MONTHS**

S7) How many consumer discussion groups have you attended in the past 5 years?

**TERMINATE IF MORE THAN 4 DISCUSSION GROUPS**

S8) What was the topic of the discussion group(s)?

**TERMINATE IF DISCUSSION WAS ABOUT THE CANADIAN ECONOMY AND HELD WITHIN THE PAST 2 YEARS**

**ASK ALL**

Q1) **DO NOT ASK – NOTE GENDER**

**ENSURE 50-50 SPLIT**

Male 1

Female 2

Q2) Could you please tell me what age category you fall in to? Are you...

Under 18 0 THANK AND TERMINATE

18-24 years 1

25-34 years 2

**ENSURE GOOD MIX PER GROUP**

35-44 years 3

45-54 years 4

55-64 years 5

65+ years 6

Refuse 9 **THANK AND TERMINATE**

Q3) Do you currently have children under the age of 18 living in the household? [**RECRUIT MIX**]

Yes 1

No 2

Q4) How many people above the age of 18 are there in your household?

One 1

More than one 2

Q5) Could you please tell me what is the last level of education that you have completed?

**ENSURE GOOD MIX PER GROUP**

Some high school only 1

Completed high school 2

Some College/University 3

Completed College/University 4

RF/DK 9

Q6) What is your current employment status?

Working full-time 1

Working part-time 2

Self-employed 3

Retired 4

Currently not working 5 Student 6 Other 7

**MAX 3 PER GROUP**

DK/RF 9

Q7) Which of the following categories best describes your total household income? That is, the total income of all persons in your household combined, before taxes **[READ LIST]?**

Under $20,000 1

**Ensure good mix by…**

**Recruiting 7 from the below $40K category**

**Recruiting 11 from the between $40 and $80K category**

**Recruiting 12 from the above $80K category**

$20,000 to just under $ 40,000 2

$40,000 to just under $ 60,000 3

$60,000 to just under $ 80,000 4

$80,000 to just under $100,000 5

$100,000 to just under $150,000 6

$150,000 and above 7

DK/RF 99

Q9) Sometimes participants are asked to write out their answers to a questionnaire, read or watch a TV commercial during the discussion. Is there any reason why you could not participate? **[READ IF NEEDED:**  I can assure you that everything written or discussed in the groups will remain confidential]

Yes 1          **THANK & TERMINATE**

No 2

**Confirmation of availability**

Q10) Would you be available to attend a discussion group on **March 22 @ 3:30pm**? The group will last no more than 3 hours and you will receive $100 for your time.

Yes 1 **CONTINUE**

No 2 **THANK AND TERMINATE**

**Privacy**

**ASK ALL**

Q11) Thank you for agreeing to take part in our sessions. We will be providing your name to the facility so that they can sign you in and check your ID when you arrive. The groups will be audio and /or videotaped for the researchers to use when doing their reporting, please note these materials will not be used for any other purpose and will be destroyed once the project is fully completed. The groups may also be observed live by people in an adjacent room. Also once the groups are completed your name will be submitted to the MRIA’s (Marketing Research and Intelligence Association) Qualitative Central system as a focus group participant, you will not be contacted for any reason for being on this list. Do you agree with this?

|  |  |  |
| --- | --- | --- |
| Yes | 1 | **GO TO INVITATION** |
| No | 2 | **ASK FOLLOW UP SO THAT YOU CAN EXPLAIN AND ATTEMPT TO CONVERT THE RECRUIT. IF STILL A REFUSAL, LOG THE CALL APPROPRIATELY.** |

***AS REQUIRED, ADDITIONAL INFO FOR THE INTERVIEWER:***

Please be assured that this information is kept confidential and is strictly accessed and used by professional market research firm to review participation and prevent “professional respondents” from attending sessions. Research firms participating in MRIA’s Qualitative Research Registry require your consent to be eligible to participate in the focus group - the system helps ensure the integrity of the research process.

**BASE: Q11=2**

Q12) Can you please tell me which item is causing you concern?

**IF POSSIBLE TRY TO ADDRESS THEIR CONCERN IF NOT THANK AND TERMINATE**

|  |  |  |
| --- | --- | --- |
|  |  | **TERMINATE** |
| Provided Name to facility | 1 | **NQP1** |
| Audio taping | 2 | **NQP2** |
| Video taping | 3 | **NQP3** |
| MRIA List | 4 | **NQP4** |

**IN-PERSON SESSIONS: Invitation:**

Do you have a pen handy so that I can give you the address where the group will be held? It will be held at:

|  |
| --- |
| **Toronto**  **Nielsen**  2345 Younge St. Suite 704  Toronto, Ontario M4P 2E5 |

We ask that you arrive fifteen minutes early to be sure you find parking, locate the facility and have time to check-in with the hosts. The hosts may be checking respondents’ identification prior to the group, so please be sure to bring some personal identification with you (for example, a driver’s license). If you require glasses for reading make sure you bring them with you as well.

As we are only inviting a small number of people, your participation is very important to us. If for some reason you are unable to attend, please call us so that we may get someone to replace you. You can reach us at **[1-800-NUMBER]** at our office. Please ask for **[NAME].** Someone will also call you the day before to remind you about the discussion.

So that we can call you to remind you about the focus group or contact you should there be any changes, Can you please confirm your name and contact information for me? **[READ INFO WE HAVE AND CHANGE AS NECESSARY.]**

First name

Last Name

Email

Day time phone number

Night time phone number

**If the respondent refuses to give his/her first or last name or phone number please assure them that this information will be kept strictly confidential in accordance with the privacy law and that it is used strictly to contact them to confirm their attendance and to inform them of any changes to the focus group. If they still refuse THANK & TERMINATE.**

# **Appendix B: Discussion Guide**

**MODERATOR’S GUIDE – MARCH 2017**

**INTRODUCTION (5 Minutes)**

* Introduce moderator and welcome participants to the focus group.
  + As we indicated during the recruiting process, we are conducting focus group discussions on behalf of the Government of Canada.
* The discussion will last approximately 2.5-3 hours. Feel free to excuse yourself during the session if necessary.
* Explanation re:
  + Audio-taping – The session is being audio-taped for analysis purposes, in case we need to double-check the proceedings against our notes. These audio-tapes remain in our possession and will not be released to anyone without written consent from all participants.
  + One-way mirror – There are observers representing the government who will be watching the discussion from behind the glass.
  + It is also important for you to know that your responses today will in no way affect your dealings with the Government of Canada.
  + Confidentiality – Please note that anything you say during these groups will be held in the strictest confidence. We do not attribute comments to specific people. Our report summarizes the findings from the groups but does not mention anyone by name. The report can be accessed through the Library of Parliament or Archives Canada.
* Describe how a discussion group functions:
  + Discussion groups are designed to stimulate an open and honest discussion. My role as a moderator is to guide the discussion and encourage everyone to participate. Another function of the moderator is to ensure that the discussion stays on topic and on time.
  + Your role is to answer questions and voice your opinions. We are looking for minority as well as majority opinion in a focus group, so don't hold back if you have a comment even if you feel your opinion may be different from others in the group. There may or may not be others who share your point of view. Everyone's opinion is important and should be respected.
  + I would also like to stress that there are no wrong answers. We are simply looking for your opinions and attitudes. This is not a test of your knowledge. We did not expect you to do anything in preparation for this group.

Please note that the moderator is not an employee of the Government of Canada and may not be able to answer some of your questions about what we will be discussing. If important questions do come up over the course of the group, we will try to get answers for you before you leave.

**OVERVIEW OF DIALS AND PROCESS (5 Minutes)**

* The first part of the group will get you comfortable with PA dials, explain how they work, in both real time as well as with closed ended questions
  + In real time, the scale will be 0-100, where 100 means you like what you are hearing a lot, and 0 means you dislike what you are hearing a lot. Participants should focus less on specific #s and more on turning the dials up and down based on how strongly they feel.
    - Importance of “starting at 50”
  + In closed ended, number of answer categories will differ, turn to the ones relevant to you
    - ie. gender scale is 2pt – Female will be 1, Male will be 2
  + We will be using the dials to answer some questions, but also so you can share your impressions of the Federal Budget that will be announced shortly.
  + We will measure reaction to the speech
* We will get you to answer about 20 questions before and after the speech, using the dials
* After the speech, we will have and then follow with discussion about what you saw/heard, using how you reacted using the dials as reference points
* So first step is to answer initial questions, then we will watch the speech (which will be 30-45 minutes in length), answer questions, then have a discussion

**TRIAL RUN OF DIALS (5 Minutes)**

Before we begin, I would like you to do a quick survey with you to ensure that the “dial” technology that we will be using this afternoon is working properly. As you can see, each of you has a dial in front of you with numbers from 0 to 100. I’m going to ask you a series of questions and I’d like you to submit your responses using the dial as I instruct.

With the questions that we will be asking you to answer over the next few minutes, the scale on your dialer will change, depending on the question. You will be asked to turn the dial to the number that reflects your answer to each question.

Before the speech begins, the dialers will be programmed to have a “0-100” scale, and you will be asked to turn the dial as discussed. 0=very negative, 100=very positive.

**PRE-GROUP QUESTIONS (15 Minutes)**

*Moderator will read questions out to participants*

Q1. Some people say that, while the country has some problems, Canada is generally headed in the right direction. Other people say that there are more things going badly than well in Canada right now and that the country is headed in the wrong direction. Which of those two statements is closer to your own opinion?

0 - DK/NR

1 - Right direction

2 - Wrong direction

Q2. How would you rate the current state of the Canadian economy? Please use a scale from 1 to 10, where 1 is terrible and 10 is excellent.

10 – Excellent

9

8

7

6

5

4

3

2

1 – Terrible

0 – DNK/REF

Q3. Over the next six months, do you think the Canadian economy will be stronger, weaker or will there be no change?

3 - Stronger

1 - Weaker

2 - No change

0 - DNK/REF

Q5. For each of the following statements please indicate whether you agree or disagree with them. Please use a scale from 1 to 10, where 1 means you strongly disagree and 10 means you strongly agree.

I think the government understands the issues that affect the health of our economy today

I think the government understands the issues that affect the health of our economy in future

I think the government understands the issues that affect the health of my personal economic situation

The government is pursuing economic policies that will help low income Canadians

The government is pursuing economic policies that will help middle class Canadians

The government is taking positive steps to help Indigenous people

The government is taking positive steps to improve education and skills training

The government is taking positive steps to improve our personal tax system

The government is taking positive steps to promote economic growth

The government is taking positive steps to promote job creation

The government is taking positive steps to protect the environment

The government is pursuing economic policies that will help people like me

[1 - 10]

0 - DK/NR

Q6. Now thinking about the upcoming Federal Budget, to what extent would you say that your expectations are positive or negative?

0 - DK/NR

5 – very positive

4 – somewhat positive

3 – neutral

2 – somewhat negative

1 – very negative

Q7. Are you?

1. Male
2. Female

Q8. Is your highest level of education?

1 – High school Graduate or below

2 – Some University

3 – University Graduate or Post Graduate

Q9. How would you describe you household income? (If necessary, average being between 55-75k/yr)

1 – Above Average

2 – Average

3 – Below Average

Q10. How old are you?

1 – 30 years or under

2 – 31 to 49 years old

3 – 50 years or older

**SPEECH (45 Minutes)**

*Participants will be asked to watch the Budget Speech and use the dialer to respond either positively or negatively to what the Minister is saying, using the 0-100 scale, where 100 reflects a very positive impression of what is heard or seen and 0 reflects a very negative impression of what is heard or seen.*

Note to moderators:

*Periodically prompt participants throughout the speech to ensure they remain engaged and focused and are using the dialers to respond.*

**POST-SPEECH QUESTIONS (15 Minutes)**

*Now, before we have a discussion, I would like to ask you some more questions with the dials…*

Q1. Some people say that, while the country has some problems, Canada is generally headed in the right direction. Other people say that there are more things going badly than well in Canada right now and that the country is headed in the wrong direction. Which of those two statements is closer to your own opinion?

0 - DK/NR

1 - Right direction

2 - Wrong direction

Q2. How would you rate the current state of the Canadian economy? Please use a scale from 1 to 10, where 1 is terrible and 10 is excellent.

10 – Excellent

9

8

7

6

5

4

3

2

1 – Terrible

0 – DNK/REF

Q3. Over the next six months, do you think the Canadian economy will be stronger, weaker or will there be no change?

3 - Stronger

1 - Weaker

2 - No change

0 - DNK/REF

Q5. For each of the following statements please indicate whether you agree or disagree with them. Please use a scale, where 1 means you strongly disagree and 10 means you strongly agree.

I think the government understands the issues that affect the health of our economy today

I think the government understands the issues that affect the health of our economy in future

I think the government understands the issues that affect the health of my personal economic situation

The government is pursuing economic policies that will help low income Canadians

The government is pursuing economic policies that will help middle class Canadians

The government is taking positive steps to help Indigenous people

The government is taking positive steps to improve education and skills training

The government is taking positive steps to improve our personal tax system

The government is taking positive steps to promote economic growth

The government is taking positive steps to promote job creation

The government is taking positive steps to protect the environment

The government is pursuing economic policies that will help people like me

[1 - 10]

0 - DK/NR

4. Now thinking about the overall Federal Budget, to what extent would you say that what you saw and heard was for the most part positive or for the most part negative?

0 - DK/NR

5 – very positive

4 – somewhat positive

3 – neutral

2 – somewhat negative

1 – very negative

5. And would you say that what you saw and heard exceeded your expectations, met your expectations, or did not meet your expectations?

0 - DK/NR

1 – Exceeded expectations

2 – Met expectations

3 – Did not meet expectations

6. While you were observing the speech, did you think it was talking mostly to politicians and economists, or mostly to average Canadians?

0 – DK/NR

1 – To politicians and economists

2 – To average Canadians

**POST-SPEECH DISCUSSION (45 Minutes)**

*Now I would like to have more of a discussion about what you saw/heard in the Federal Budget…*

* What was your overall impression of speech? Why do you say that?
* What were the main things that you remember hearing in the budget?
  + What are your impressions of this element? Why is that?
* What were the best ideas that were in the speech? Why is that?
* What were the less positive aspects that were in the speech? Why is that?
* How would you sum up the Budget in one sentence?
* After hearing what is in the Budget, what will have the largest impact on you or your family?

As you know, you were using the dial to register your impressions of the speech as it was read. What I would like to do is ask about some specific aspects of the speech that appeared to resonate.

MODERATOR WILL HAVE THE DATA AND WILL LOOK AT THE POSITIVE AND NEGATIVE SPIKES OVER THE COURSE OF THE SPEECH. WILL SELECT 3 TO 4 TOPICS FROM POSITIVE AND NEGATIVE CHANGES AND PROMPT ON THOSE.

Let’s start with some of the positives…FOR EACH TOPIC IDENTIFIED…

* What did you like about this aspect from the budget? Why is that?
  + What did it mean to you? Was it clear? How could it have been clearer?
  + Is it relevant to you personally?

Let’s turn our attention to areas where there were some declines in impressions…FOR EACH TOPIC IDENTIFIED…

* What was your impression about this aspect from the budget? Why is that?
  + What did it mean to you? Was it clear? How could it have been clearer?
  + Is it relevant to you personally?

Lastly, did you think this was a speech for Canadians, or Parliament/economists? Why do you say that?

**CONCLUSION (5 Minutes)**

* We have covered a lot of topics today and really appreciate you taking the time and energy to come down here and give your opinion. Your input is very important and insightful!
* To conclude, I wanted to ask you whether you have any last thoughts that you want to give the Government of Canada?