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# Finance Canada 2018 Focus Groups on the Economy (Qualitative) through Perception Analyzer - Research Report

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## Executive Summary

Prepared by:  
Corporate Research Associates Inc.

Prepared for:  
Finance Canada

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



Suite 5001, 7071 Bayers Road  
Halifax NS B3L 2C2  
[www.cra.ca](http://www.cra.ca)  
1-888-414-1336



## Executive Summary

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### Background and Objectives

Finance Canada wanted to assess the sentiment of a cross-section of Canadians in Montreal and Toronto with respect to what they heard in the budget speech. The stated objective of the research is *“to explore Canadian’s reaction and gauge the effect of the Budget and its measures that flow from it.”*

Results from the qualitative research allows Finance Canada to get a clear and current sense of the evolution of the public mood towards the state of the economy, sense of personal economic well-being and government actions in the economic sphere.

### Methodology

For this study two “super focus groups” were conducted in Montreal (French) and Toronto (English). Participants were recruited to represent adult Canadians 18 years of age and older and recruiting was structured to provide a good cross representation based on gender, age, income, education, children in household and employment status. The recruitment screener is attached as Appendix A.

A total of 59 Canadians participated in the research (29 in Toronto and 30 in Montreal). The Toronto session was conducted in English, while the Montreal group was conducted in French. Participants were paid an incentive of \$175 and both sessions were conducted simultaneously February 27<sup>th</sup>, 2018.

Participants used Perception Analyzer<sup>®</sup> software to indicate their sentiment with respect to a set of 16 questions asked pre and post speech (which allowed for a measure of change in sentiment). Participants also used the software to rate their positive and negative reactions in real-time as the Minister delivered the budget speech. The dial ranged from 0 to 100, with 50 representing a baseline “neutral” score. Following this, participants discussed their impressions of the federal budget.

Perception Analyzer<sup>®</sup> technology allows participants to anonymously respond to stimuli in real time. Participants are provided a hand-held dial that relays their responses to a central PC that then consolidates the information and relays it onto viewing monitors for client groups.

### Context of Qualitative Research

Qualitative discussions are intended as moderator-directed, informal, non-threatening discussions with participants whose characteristics, habits and attitudes are considered relevant to the topic of discussion. The primary benefits of group qualitative discussions are that they allow for in-depth probing with qualifying participants on behavioural habits, usage patterns, perceptions and attitudes related to the subject matter. Qualitative techniques are used in marketing research as a means of



developing insight and direction, rather than collecting quantitatively precise data or absolute measures. As such, results are directional only and cannot be projected to the overall population under study.



## Political Neutrality Certification

I hereby certify as a Representative of Corporate Research Associates Inc. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the ***Directive on the Management of Communications***. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Signed \_\_\_\_\_



Margaret Brigley, President & COO | Corporate Research Associates

Date: March 20, 2018



## Key Findings

- Overall, the content of the budget speech was well received by the participants in both Montreal and Toronto.
- Participants in each city reacted in a similar manner to the key elements. The area where sentiment separated to a certain degree was in the area of science and innovation. In this case, Toronto participants reacted more positively than Montreal participants.
- Within the sessions there were some minor demographic differences:
  - Middle aged respondents (31 to 49 years) reacted more positively to measures for Indigenous issues than younger (30 years or younger) and older participants (50 years or older).
  - Older participants reacted more positively to issues impacting middle income Canadians than middle age participants.
  - Below average participants (less than \$55,000) were less positive about issues impacting the economy, middle income families, tax fairness and job creation.
  - Women reacted more positively to discussions around gender equality, tax fairness and job creation than men.
- While the key elements in the budget were considered important, particularly those related to gender equality and Indigenous issues, they also were not seen as innovative or new, based on a sense that these kinds of measures were included in every budget. Based on these perceptions, participants were also skeptical that the 2018 budget initiatives would succeed in resolving these issues any more so than previous budgets.
- Some wanted to receive details about how the policies and programs would be funded, whether this meant spending cuts elsewhere, and how total spending compared to previous years.

Perceptions of the Canadian economy and whether the government is taking positive steps to help Canadians improved following the budget speech.

