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BUDGET DAY FOCUS GROUPS
Executive Summary

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Canada

Executive Summary

Leger is pleased to present the Department of Finance Canada with this report on findings from qualitative online focus groups designed to learn about Canadians opinions and perceptions on the March 28, 2023, federal budget speech.

This report was prepared by Léger who was contracted by the Department of Finance Canada (contract number CW2294070, awarded March 9, 2023).

1.1   Limitation of Results

The qualitative portion of the research provides insight into the opinions of a population, rather than providing a measure in percent of the opinions held, as would be measured in a quantitative study. The results of this type of research should be viewed as directional only. No inference to the general population can be done with the results of this research.

1.2   Methodology—Qualitative Research

Online Focus Groups and Moment to Moment Technology

Leger has recruited participants by telephone, using a thorough screening process, and those who qualified were invited to attend a 2-hour online focus group. Leger recruited 40 participants to achieve 10 participants per focus group. Two groups were conducted in English and two in French. The online sessions and the dial analysis have been held through the Mercury Analytics platform and technology. This research included moment-to-moment technology built into the online focus group environment.

Participants answered introductory questions while the Budget was being delivered (to ensure participants did not watch the Budget in advance of the moment-to-moment evaluation) before providing real-time feedback using the moment-to-moment technology. Moment-to-moment technology allowed participants to evaluate the budget speech in real time. Participants provided their emotional response on a scale while watching the video recording of the speech. The measurement scale used ranked from very negative to very positive.

Target	Number of participants
Young adults (less than 40 years old), English	8
Older adults (40 years old or older), English	9
Young adults (less than 40 years old), French	8
Older adults (40 years old or older), French	6*
TOTAL	31

*Due to a technical issue, one participant was disconnected before the end of the focus group.

1.3   Summary of Findings

The reactions to the third budget presented by the Honourable Chrystia Freeland were somewhat positive for most focus group participants. While the general outlook was more positive than negative, many participants were still unsure by the end of the speech that the announcements would have an impact on them or their household. Several participants tended to feel the speech lacked concrete announcements or initiatives directed at them or their family and that what was announced was lacking in detail to fully understand the impact of it.

While the tone and content were reassuring, they struggled, post-speech, to recall specific positive moments in the speech itself beyond dental care. While pre-budget speech discussions were dominated by affordability issues, this remains the topic where participants tended to be disappointed with the content of the speech itself.

The results of the dial test were relatively positive. All four groups gave average scores above 50 out of 100. The groups of English-speaking Canadians gave lower scores than the Francophones in general: 54 on average for the Anglophones vs. 60 for the Francophones, though this is mainly due to the older Francophone group, which gave an average score of 70 out of 100 to Minister Freeland's speech (vs. 53-55 for the other three groups).

Some felt somewhat of a disconnect between the moderately optimistic tone of the speech on inflation and the economy, as participants believed Canadians are struggling to make ends meet. In general, older participants tended to be more positive than younger participants before, during and after the speech. Those under 40 mentioned cost of living issues in more somber terms.

The measures on health care funding and dental care received the most positive ratings, both in the perception analyzer and in the discussion following the Federal Budget speech. However, some participants would have liked to see more specific mentions regarding mental health in the budget. The measures on the green economy left many participants indifferent or even uninterested. Several participants noted that housing was largely omitted from the budget speech, along with details on the implementation of measures to help families cope with rising grocery prices.

Three types of participant profiles seemed to emerge from the discussions. The most pessimistic ones were cynical about follow through and did not expect the budget to change anything. The more neutral ones seemed to welcome the budget announcements rather positively but remained sceptical about its feasibility and concrete implementation by the government. The most optimistic participants acknowledged the challenging circumstances and multiple ongoing crises but emphasized that Canadians were in a much better situation compared to most other countries and should be grateful and proud.

Group 1 – English speaking adults under 40 years old

Budget Items Most Supported:

- The Dental Care Plan was the biggest attention grabber. Initial reactions to it were quite positive. Some recall that it would ultimately support up to 9 million Canadians who don't have dental coverage see a dentist.
- The clean economy generated some positive commentary, although more muted than the Dental Plan. Many participants support the concept of moving to a clean economy, however, they are eager to have more details about what that means in practical terms and how it will affect existing industries such as the automotive sector in Ontario.
- The Grocery Rebate did not come up early in the discussion about Budget high points. When it did come up, reaction was mixed and questions about qualifying criteria were raised.
- There was a positive uptick in the dial results when the national Electrical Grid was discussed.
- A reference to 'affordable childcare' was seen as a good thing, however, participants noted that not a lot of detail was offered about what this meant.

Budget Items Less Supported:
- While not a specific measure, people often commented that aspects of the speech felt self-congratulatory. Participants were somewhat cynical and questioned about what had been actually accomplished or how useful the information was. This came up in the context of the women in the workforce piece of the Budget. Several people questioned the purpose, with two individuals being more critical with this discussion as they were stay-at-home parents by choice.
- The self-congratulatory criticism came up again when discussing the government's efforts to address rising costs, with a participant disagreeing that inflation was coming down. His view was prices were still rising.
- When the war in Ukraine was mentioned or issues relating to the Russian president, dials went down. When probed in the group discussion, the view was that it was unclear how the war and Canada's support fit into the budget. There was no clear connection as to why it was being discussed.
- Immigration did not come up a lot in the speech, but when it did this group's dials declined noticeably.
- The storytelling section outlining the '*Big Important Things being done in Canada*' did not resonate particularly well with participants in this group, but it was not overly negative either. When discussed it did not have any particular importance for participants.
- While the Dental Care Plan was one of the positive announcements in the budget, it did generate some negative commentary during the discussion. Several people commented that they did not feel dental care was a top priority in terms of health-related issues in comparison to the more traditional healthcare needs in their province: the need for more family doctors, surgeons to reduce wait times or nurses in hospitals. One individual surmised that the federal government had decided to focus on dental care because it was an easier issue to address.
- One individual raised a concern that the Grocery Rebate was being financed by the Government of Canada and felt that major supermarket corporations should be offering this instead, given the huge profits they were making.

What Was Missing in the Budget:
- No reference, or very little reference to housing, particularly affordable housing
- Healthcare seemed to get little reference. In this group no recall of the healthcare investment amount ($198B) nor when probed, was there recall of the recent agreement reached between the federal government and the provinces on additional healthcare dollars.

Group 2 – English speaking adults 40 years old or older

Budget Items Most Supported:
- The Minister's highlighting of the healthcare investment as well as the dental care plan, particularly the mention of covering uninsured Canadians were positive aspects of the speech. These topics saw high positive reactions on the dial test. But when discussing them, reactions were mixed as participants were unsure how the announced budget would be spent. Some participants were hopeful that the healthcare investment would assist in the acquisition and retention of family doctors in their province and shorter wait times for elective surgeries and procedures, while others were skeptical about the amount of the healthcare investment considering the amount the country spent during the COVID-19 pandemic.
- The opening of the Volkswagen battery plant in Ontario as well as the lithium mine in Quebec also had positive reactions from the group. In the post speech discussion, it was mentioned that opening new plants would be beneficial for their local economy. The portion of the speech that mentioned making Canada a reliable supplier of clean energy to the whole world was also rated highly but to a lesser extent.
- The average $10/day daycare and its positive impact on women in the workforce received a positive uptick in the dialer ratings. When discussed, several felt that this had a positive impact on family members while a few participants expressed that this presented a conflict of values for either themselves or colleagues in that not all women want to work outside of their homes.
- The end of the speech, when the Minister was mentioning the remarkable country that is Canada, was also rated highly by participants.

Budget Items Less Supported:
- There were not any topics or ideas that were less supported throughout the budget speech. However, each time the Minister mentioned the Russian president or Ukraine, ratings on the dialer decreased.
- Some participants mentioned the speech was overly simplified, and others mentioned it was a lot of positive talk that was not supported by concrete measures.

What Was Missing in the Budget:
- Overall impressions about the federal budget speech were that it was clear, very simple to understand and positive, but somewhat vague regarding specific measures.
- In the post budget discussion, participants mentioned that they wished they had heard more about affordable housing.

- Grocery prices, the grocery rebate, and who would benefit from this, were also brought up.
- In the context of healthcare investments, one participant mentioned that vision care should also be considered.
- One participant mentioned that there was no mention of reconciliation in this year's budget speech.

Group 3 – French speaking adults under 40 years old

Budget Items Most Supported:
- Healthcare funding and the national dental care plan were the two most highly rated moments in the budget, followed by renewable energy and green initiatives. However, in the post-budget discussion, some participants felt they did not clearly understand concretely how the new funding would improve the state of their health care system. As for the dental care program most believed it was a positive step forward but did not feel it would impact them directly.
- While the participation of women in the labour force was rated fairly high, it was not recalled as a positive in the post-budget discussion, indicating it was deemed positive but not at the level of health care funding or the dental plan.
- On clean energy initiatives, participants felt they agree with the objective but failed to recall what was new in this area, following the speech.

Budget Items Less Supported:
- During the portion of the speech where the Minister discussed inflation, the dial test tended to flatline. Many commented that while the intent was to reassure and use statistics to portray a brighter picture of the situation in Canada, the speech did not include any concrete measures to help Canadians face issues of affordability. In the post-budget discussion, some felt disappointed with the absence of concrete programs or initiatives to help Canadians deal with high inflation and high cost of living issues.
- While the dial test in general was rarely in the negative zone, the mention of President Putin and the reliance of certain countries on resources coming from non-democratic regimes was a lower point in the speech. Very few comments allow us to clearly understand why that is, some mentioned it was not relevant to them or their situation.

What Was Missing in the Budget:
- Among younger French language respondents, the absence of housing specific initiatives was the most often mentioned element missing from the budget. This may be due to low awareness of already existing measures, they felt "something" in the budget should have addressed the issue of first-time home buyers, rent relief or other measure targeted to them.
- Some commented that the speech included very few specific announcements of concrete initiatives to help Canadians deal with the cost-of-living crisis.

- Some participants also said the speech did not address the needs of lower income Canadians.

Group 4 – French speaking adults 40 years old or older

Budget Items Most Supported:
- Ratings were generally positive throughout the speech.
- Healthcare funding and the creation of a new Canadian dental care plan seemed to be the most appreciated announcement as it caused an uptick in the dial test and was also brought forward as a very positive measure by the participants during the group discussion.
- The mention of wealthy Canadians and large corporations paying their fair share to maintain the middle class's tax level lower and to invest in the health care system and social safety net was the highest rated during the dial test. However, participants did not mention these items during the group discussion.
- The mention of the participation of women in the labour force being at a record high also scored quite high on the dial test.
- Other mentions from the speech that were received positively included: the grocery rebate, investing in Canadians, post-COVID job recovery, Canada's solid institutions and tradition of fiscal discipline, working toward a clean economy and environmental protection and Canada working closely with like-minded allies such as the United States and Europe.

Budget Items Less Supported:
- The rating seemed to be lower when economic hardships and optimism for the future were mentioned.
- The mention of clean energy workers was rated lower in the dial test. Some doubts were also mentioned during the group discussion on the sustainability and success of electric cars and the battery industry for the Canadian economy and society.
- The meeting of the Deputy Prime Minister Freeland with actual Canadians named by first names was seen as unnecessary and unimpactful for the participants' lives and situations. They tended to reflect on that part of the speech rather negatively in the group discussions.
- Mentions of measures targeting immigrants and Indigenous people seemed to generally be seen less positively by the participants.

What Was Missing in the Budget:
- In general, participants would have liked more information on how certain measures will be rolled out over time. For example, how the rebate will be actually offered on grocery purchases. Some participants indicated that they would have liked to see more clarity in this area.
- Participants would have liked to be provided more information on the economic situation in Canada, more specifically on the country's debt level and when we could expect to balance the budget.

- Other participants noted that this budget offered little to Canadians around housing, other than for refugees and immigrants.
- One participant from Atlantic Canada indicated that she would have liked to hear more about these smaller provinces in the budget, not just the larger ones (Quebec, Ontario, etc.).

1.4 Notes on The Interpretation of The Findings

The opinions and observations expressed in this document do not reflect those of the Department of Finance of Canada. This report was compiled by Leger based on research conducted specifically for this project.

Given the nature of the qualitative research undertaken, some of the findings related here will take the form of figures, numerical ratings and some comparisons will be made between different groups present in the qualitative exercise. Participants had to evaluate the budget speech in real time using a dial with numerical figures and were asked to privately answer some polling questions appearing on their computer screens. However, the reader is advised to exercise caution when reading the analysis which follows as the process remains qualitative in nature and therefore does not allow for statistical inference to be made to a larger population. The "results" presented are only directional in nature and are used to be reflective on what went on during the qualitative exercise.

1.5   Declaration of Political Neutrality and Contact Information

I hereby certify, as chief agent of Leger, that the deliverables are in full compliance with the neutrality requirements of the *Policy on Communications and Federal Identity* and the Directive on the Management of Communications—Appendix C (Appendix C: Mandatory Procedures for Public Opinion Research).

Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, party positions, or the assessment of the performance of a political party or its leaders.

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