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Finance Canada 2019 Focus Groups on the Economy (Qualitative) through Perception Analyzer - Research Report

Executive Summary

Prepared by:
Corporate Research Associates Inc.

Prepared for:
Finance Canada

Ce rapport est aussi disponible en français.

For more information on this report, please email:
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Canada 

2019 Focus Groups on the Economy (Qualitative) through Perception Analyzer

Final Report

Prepared for Finance Canada

Supplier Name: Corporate Research Associates Inc.

April 2019

This public opinion research report presents the results of focus groups conducted by Corporate Research Associates Inc. on behalf of Finance Canada. The research study consisted of a series of three “super-groups” conducted in Montréal, Toronto and Vancouver with Canadian adults 18 years of age and on March 19, 2019.

Cette publication est aussi disponible en français sous le titre :
Groupes de discussion 2019 (qualitatifs) sur l'économie du ministère des Finances Canada avec l'outil Perception Analyzer - rapport de recherche.

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Executive Summary

Research Purpose and Objectives

The objective of the research is to provide Finance Canada with an assessment of the sentiment of a cross-section of Canadians in Montréal, Toronto and Vancouver, with respect to what they heard in the budget speech. The stated objective of the research is *“to explore in more detail Canadians’ overall concerns and perceptions about the current state of the Canadian economy, emerging economic issues and their expectations about the role of the Government of Canada in the economy.”* The research was also designed to *“explore Canadian’s reaction and gauge the effect of the Budget and the 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.

Key Findings

- Overall, participants in Montréal, Toronto and Vancouver reacted positively to the 2019 budget speech.
- However, there were key areas where participants felt that the speech was lacking. Participants wanted more information on the programs and policies identified and felt that the lack of details surrounding the financial costs of implementing programs was an issue.
- Given the fact that 2019 is an election year, several participants in each city made the comments that this was what they expected to hear in an election speech. While participants appreciated the importance of the speech’s key topics, there was also a sense that these are perpetual issues addressed in budget speeches and there has been a lack of progress in these areas in the past, indicating a lack of credibility in some of the announcements.
- Regardless of the perceived shortcomings of the speech, respondents did show an increase in positive sentiment post speech. This does reinforce the observation that the content areas were important and if the government can implement the policies and programs discussed, Canadians perceive that an improvement in the economy and their personal financial situation will be realized.
- As would be expected, different cohorts reacted to the speech differently. In general, participants from Toronto reacted most positively. Female participants, participants without university or post graduate education, below average income participants, and younger participants (30 years of age or younger) were the most likely groups to react positively to the budget.



Methodology

The research methodology for this assignment consisted of a series of three “super-groups” conducted in Montréal, Toronto and Vancouver (which represented a new location for the research). 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 recruiting was based on a prequalified set of panel participants that were recruited using a combination of online and telephone recruiting techniques. The recruitment screener is attached as Appendix A.

A total of 89 Canadians participated in the research (32 in Montréal, 27 in Toronto and 30 in Vancouver). The Toronto and Vancouver sessions were conducted in English, while the Montréal group was conducted in French. Participants were paid an incentive of \$125 and all sessions were conducted simultaneously over a three-hour period on March 19, 2019.

Table A provides a breakdown of sessions by location and key demographics.

City	Gender			Education			Income			Age			Total
	Male	Female	Non-Binary	HS or Less	Some Post-Secondary	University or Post	Below Average	Average	Above Average	30 & Under	31 to 49	50 & Over	
Montréal	16	16	0	9	11	12	9	7	16	6	18	8	32
Toronto	12	14	1	3	10	14	5	8	14	7	7	13	27
Vancouver	16	14	0	4	14	12	6	12	12	7	15	8	30

Participants used Perception Analyzer® 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’s budget speech was read. 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® 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



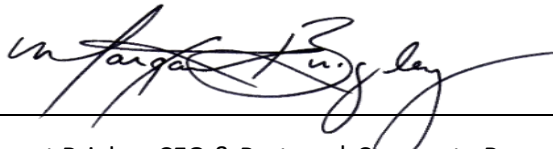
related to the subject matter. Qualitative techniques are used in marketing research as a means of developing insight and direction, rather than collecting quantitatively precise data or absolute measures. As such, results are directional only and cannot be projected to the overall population under study.

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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, CEO & Partner | Corporate Research Associates

Date: April 3, 2019

