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BUDGET DAY FOCUS GROUPS

Executive Summary

Prepared for Finance Canada

Supplier name: Leger marketing inc.
Contract number: 60074-212074/001/CY
Contract value: \$59,192.50
Awarded date: 2022-03-24
Delivery date: 2021-04-22

Registration number: POR-142-21
For more information on this report, please contact Department of Finance Canada at:
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Ce rapport est aussi disponible en français.

Canada

This public opinion research report presents the results of an online focus groups conducted by Léger Marketing Inc. on behalf of the Government of Canada. The research study was conducted with 30 Canadians on April 7th, 2022.

Cette publication est aussi disponible en français sous le titre :

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Department of finance

90 Elgin Street

Ottawa, ON K1A 0G5

Catalogue Number:

F2-291/2022E-PDF

International Standard Book Number (ISBN):

978-0-660-42780-5

Related publications (registration number POR-081-19): F2-291/2022F-PDF978-0-660-42782-9

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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 April 7, 2022, federal budget speech.

This report was prepared by Léger who was contracted by the Department of Finance Canada (contract number 60074-212074/001/CY awarded March 24, 2022).

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 recruited participants by telephone, using a thorough screening process, and those who qualified were invited to attend a 2.5-hour online focus group. Leger recruited 40 participants across four focus groups (10 per group). Two groups were conducted in English and two in French. This research included moment-to-moment technology built into the online focus group environment.

Participants answered introductory questions while the Budget was being delivered (this also ensured 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 a simulated real time context. 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.

The following table details the composition of the four focus groups and the actual number of participants in each.

Target	Number of participants
First time home buyers	8
Senior Canadians 65+	7
Millennials (Youth)	8
General population in the province of Quebec	7
TOTAL	30

1.3 Summary of Findings

The reactions to the budget presented were generally positive for most focus group participants. Indeed, most of them provided spontaneous positive reactions to the speech in general. Participants from the general population of Quebec had the most critical, but not overwhelmingly negative, verbal feedback of all groups. It should be noted that expectations were rather high as participants expected a strong government response to the less than favorable economic climate in the post-pandemic context. However, a lot of participants did not really know what to expect in terms of specific measures. That being said, young people and new homeowners were the most enthusiastic in terms of general expectations, while senior participants and those from the general population of Quebec had the most negative expectations.

The results of the dial test show a positive rating of the budget speech. The overall average out of 100% were all above the 50% mark, indicating a rather positive reception. English-speaking participants seemed to have been more critical compared to French-speaking participants: New homeowners had the lowest overall average (58.2), followed by seniors (60.7), the general Quebec population (67.1) and millennials (72.4).

Like the previous budget, there was considerable cynicism and doubt among participants about the government's willingness to fulfill its promises and move forward with these measures. Senior participants showed some optimism and hope in the face of this but many participants in all the groups struggled to see how the measures presented will impact them personally or their family members. This perception that the budget will not have a direct impact on their lives seems to be fuelling the observed estrangement from the budget for some.

Overall, it is the housing measures that generated the most discussion among participants following the budget speech and were of significant interest to many. The discussion quickly turned to more practical aspects of the measures, including the timeframe of the proposed measure (10 years) and who will be able to benefit from the measure. Still reactions were mostly positive.

Group 1 – Seniors (English)

The budget items that received highest ratings from the seniors' focus group were:

- Overall, the budget touched on a lot of important things: Housing; Military; Climate. These were all noted as things that Canada needs to do something about.
- The military investment was noted by several participants as the main positive measure presented in this year's federal budget. Several participants even mentioned it was time Canada did its part and strengthened its military.
- The mention about affordable housing was also well received by the seniors. Most of them being retired, this was a measure they were hoping the budget would cover, so they were happy to see the government had a plan in that regard. Some of the participants had concerns about the mention of "doing it fast". They agreed that more housing is needed, but it needs to be done right, rather than fast.

Overall, there was not a great deal of enthusiasm in this group for the budget nor strong negative responses. Nothing really stood out to them as a big talking point.

The budget items that appeared to garner less support were:

- Most participants felt the budget touched on a lot of important priorities for Canada but was limited to more general statements as opposed to clearly outlined initiatives. There was no clear plan on how these priorities would be addressed.
- A few senior participants from Saskatchewan were impressed and surprised by how specific the details on electric cars and charging stations were presented. *“Seems this was the one point where details were provided and not Canada’s biggest issue right now”*.
- As mentioned, the housing measure was well received by this group, but the pace ‘double in 2 years’ was concerning:
 - It was not clear how that would get done
 - It made them worry that building would be rushed and therefore builders would cut corners and the result would be shoddy housing
- A few people said there was too much focus on the Ukraine issue. They felt that a few comments around increased military spending would have been enough given it was perceived as a domestic budget speech.

Items missing from the budget

- Participants mentioned that the budget did not include specific measures for seniors.
- While healthcare funding and health transfers had been mentioned frequently during the pre-budget discussion, participants outlined this was absent from the speech as well.
- Many seniors commented how little was mentioned in the speech about the pandemic itself and what they could expect for the coming months, as if the motto was simply to “move on”.
- As with some other groups, seniors also mentioned that Indigenous communities were not directly mentioned or addressed in the budget speech.

Group 2 – First time home buyers

Budget items that received highest ratings from homebuyers

- The Minister’s highlighting of the post pandemic economic recovery was positively viewed by homebuyers. Of note was the fact that the economy has recovered 112% of the jobs lost at the height of the pandemic. This saw high positive reaction on the dial test.
- Childcare was received positively. Reactions to this during the dial test spiked. However, when circling back to group participants there were questions on how much this plan would cost. As well, some were apprehensive about supporting a program that they would not be using (primarily those who did not have kids of childcare age).
- The budget’s mention of Canada’s role and position on the Ukraine – Russia war was seen positively. Specifics about the conflict received negative reactions on the dial test, but

when the Minister spoke about Canada's direct support of the Ukrainian military and the need to continue this, reactions were positive.

- When discussing pillar 1 – investing in people, homebuyers had positive reactions to the mention that housing is both a basic human need and an economic imperative. When the Minister presented solutions to the housing crisis such as doubling the construction of new homes, the dial test registered a positive uptick. However, in the post-budget discussion, respondents were less convinced that the construction of new homes would solve the housing crisis. Most agreed with the statement that there is not a single silver bullet to solve the housing affordability crisis in Canada.

Budget items that appear to be less supported

- The discussion on the debt, especially the debt related to the pandemic saw negative reactions. Most homebuyers expressed apprehension and unease about the national debt leading into the budget.
- The discussion on the environment and the green transition received less favourable reactions from homebuyers. The group did not tend to score high positive reactions during this section of the budget, with dial test results hovering above and below the 50-mark line. Few mentioned the environment in the post-budget discussion and among those who did, the discussion hinged on the fact that there is a lack of incentives for electric vehicle purchasing or renewable energy retrofits for their homes.

Items missing from the budget

- In the post budget discussion, homebuyers mentioned that they wished they heard more for renters. There were no mentions about rent control or specific supports to those who are currently renting in order to address the housing affordability crisis.
- Some homebuyers also noted that the budget did not include anything related to health care. The pandemic had exposed shortfalls within provincial health care systems such as hallway medicine and they heard nothing on this.

Group 3 – French Language Millennials (youth)

The budget items that received highest ratings by Millennials were:

- The mention of measures for affordable housing and home ownership had the most positive impact on participants. Many felt that these measures would have a direct impact on their household.
- The additional investment in the military was well received by millennials. The line went up considerably when it was mentioned that this investment would allow the country to deal with any threats we might face.
- Canada's aid to Ukraine (in money and missiles) has also been well received by the Millennials.
- Social measures and those on sustainable development (affordable housing for all, access to home ownership for future generations, fight against climate change, a good health care system, mental health care, equal society for all) that were quickly mentioned

towards the end of the speech were received positively. However, participants were eager to see how they would be implemented.

The budget items that appeared to be less supported by Millennials were:

- Investments in critical minerals and metals were not well received by Millennials.
- During the part of the speech about the conflict in Ukraine, said it was expressed, through the voice of the translator, that we must “fight for peace” (“*Se battre pour la paix*”). This expression was disturbing for some participants. The line went down considerably at this point. Some mentioned the contraction of the words “fight” and “peace” and stressed the fact that we should not fight for peace.

Missing items were:

- While investment in Canadian innovation and talent was well received by participants, some mentioned that lack of jobs was not an issue at the moment, but labour shortage was. Wage and minimum wage increases should have been addressed in their opinion.
- Many participants were looking forward to the environmental measures but were disappointed by the announcement that electric vehicle batteries would be manufactured in Canada, as they felt that this was not the appropriate measure to address the significant environmental problems the country is facing: fighting climate change should be done on other battlefronts rather than that of electric vehicles.
- Some participants were surprised that there were no measures for seniors, people living with disabilities or Indigenous communities.

Group 4 – General Population of Quebec

The budget items that received highest ratings from the Quebec participants were:

- Affordable childcare - Making daycares affordable for all parents with a set pricing of \$10/day in three years was one of the highlights for participants. However, some flags were raised regarding the quality of daycare offered, as well as the recruiting of daycare workers amidst the labour shortage.
- Affordable electric vehicles - Making electric vehicles affordable to the middle class was also positively received. This was however not perceived as being enough of an answer to the climate change crisis, and electricity prices were a source of worry.
- Putting a stop to real estate/property speculation - This was one of the most well-received measures, as foreign investments in Canada were perceived as a threat to Canadian resources and to the Canadian population's access to affordable housing.
- Building housing - Building affordable housing in order to improve access to property was seen as a positive measure overall, but questions about unsafe, unsanitary housing were raised, as this is an issue that needs to be fixed as well. In addition to that, concerns about the rapidly increasing rents and cost of properties were also brought up: *“It is nice to build new housing, but if it still is not affordable, then what is the point?”*
- Investments in research and innovation received positive marks all around.

The budget items that appeared to be less supported by the Quebec participants were:

- Increased security and military investments - This measure was perceived negatively by some Quebecers as they considered other priorities to be more important. Investment in the military was perceived negatively by all participants.
- Creation of the Canadian growth fund – While the measure about supporting research and innovation was well received, it is the creation of a federal agency that will oversee this measure that faced criticism from participants. Federal agencies were seen as a bureaucratic and inefficient organizations. Participants were sceptical about those funds reaching the rightful targets and people, they pointed out the fact that CERB was received by many individuals who they felt did not need it.

Missing items or questions participants expressed about the budget speech:

- Measures to provide safe and affordable housing for Indigenous peoples who live in precarious conditions.
- Further measures to address climate change: no measures about oil and oil extraction operations, nor the transition towards green energies after oil resources run dry.
- Concerns about how Ukrainian refugees will be handled once in Canada were also raised: where will they be housed?
- No measures concerning seniors and people living with disabilities.

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.

Signed by:



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