



Gouvernement
du Canada

Government
of Canada

BUDGET DAY FOCUS GROUPS

Report

Prepared for Finance Canada

Supplier name: Leger marketing inc.
Contract number: CW2294070
Contract value: \$69,972.99
Awarded date: 2023-03-09
Delivery date: March 31st, 2023

Registration number: POR-144-22
For more information on this report, please contact Department of Finance Canada at:
Heather.Mustoe@fin.gc.ca

Ce rapport est aussi disponible en français.

Canada

This public opinion research report presents the results of online focus groups conducted by Léger Marketing Inc. on behalf of the Government of Canada. The research study was conducted with 31 Canadians on March 28th, 2023.

Cette publication est aussi disponible en français sous le titre : Groupes de discussion sur le dépôt du budget

This publication may be reproduced for non-commercial purposes only. Prior written permission must be obtained from Finance Canada. For more information on this report, please contact Finance Canada at: por-rop@gc.ca.

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-PDF

978-0-660-42782-9

© His Majesty the King in Right of Canada, as represented by the Minister of Public Works and Government Services, 2023.

Table of Contents

REPORT	1
EXECUTIVE SUMMARY	4
1.1 <i>LIMITATION OF RESULTS</i>	4
1.2 <i>METHODOLOGY—QUALITATIVE RESEARCH</i>	4
1.3 <i>SUMMARY OF FINDINGS</i>	5
1.4 <i>NOTES ON THE INTERPRETATION OF THE FINDINGS</i>	10
1.5 <i>DECLARATION OF POLITICAL NEUTRALITY AND CONTACT INFORMATION</i>	11
DETAILED RESULTS	12
2.1 SOCIODEMOGRAPHIC ANALYSIS OF DIAL TEST RESULTS	12
2.1.1. <i>Age</i>	12
2.1.2. <i>Gender</i>	12
2.1.3 <i>Region</i>	13
2.1.4. <i>Education</i>	13
2.1.5 <i>Employment status</i>	15
2.1.6. <i>Income</i>	15
2.1.7 <i>Area</i>	16
2.2 POLL RESULTS AND DISCUSSION.....	16
2.2.1 <i>English-speaking adults under 40</i>	16
2.2.2 <i>English-speaking Canadians over 40</i>	18
2.2.3 <i>French-speaking adults under 40</i>	22
2.2.4 <i>French speaking adults over 40</i>	24
<i>Conclusion</i>	26
APPENDIX	27
A.1 QUALITATIVE METHODOLOGY	27
A.2 SCREENING GUIDE.....	28
A.3 DISCUSSION GUIDE.....	37

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.

Signed by:



Christian Bourque
Executive Vice President and Associate
Leger
507 Place d'Armes, Suite 700
Montréal, Quebec
H2Y 2W8
cbourque@leger360.com

Detailed results

2.1 Sociodemographic analysis of dial test results¹

2.1.1. Age

Overall, participants 40 years of age or older and those under 40 had similar opinions on the speech. They respectively gave an average score of 60 and 54. The items where their scores differed the most were the mention of inflation and monetary tightening by central banks during the pandemic (55 for participants aged 40 years old or older vs 42 for participants aged under 40 years old) and when talking about green energy and the changes that the Canadian economy will have to make, which the Minister describes as *the most significant since the Industrial Revolution*, the rating among participants aged under 40 years went down to 42, while the rating among participants aged 40 years old or older was at 64.

When breaking down the age groups, participants 35-44 years of age gave the lowest average rating to the speech (47), followed by those aged 55 and over (50), 18-24 (55), 25-34 (62), and finally, 45-54 participants gave the highest average rating of 74. Ratings of the 45-54 age group were consistently higher than those of other age groups throughout most of the speech. On the other hand, participants aged 35-44 gave the lowest ratings on most of the speech, except for the dental care portion of the speech where their rating was on par with most other groups (around 70-80), excluding those over 55 years old who gave it a 59 rating.

The projected inflation rate received the highest rating from participants aged 25-34 (84), followed by those aged 45-54 (67) and those over 55 years old (59). Participants aged 18-24 and 35-44 gave ratings of 55 and 51, respectively.

Participants aged 55 and over gave the speech's final portion, in which Minister Freeland mentioned examples of Canadian workers, the lowest ratings of all age groups, with an average rating of around 37.

2.1.2. Gender

The overall average rating of the speech was slightly higher among men than women (59 compared to 54). Men tended to respond more positively to mentions of Canada's strong economic growth and post-COVID job recovery, with an average rating of approximately 65 compared to 55 among women. Men also gave higher ratings for the record level of women's participation in the labor force (70 compared to 57), the central banks' synchronized monetary tightening (55 compared to 40), the reinforcement of the immigration system (64 compared to

¹ 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.

51), collaboration with democratic allies (approximately 62 compared to 50), free trade agreements (62 compared to 52), and the Galaxy lithium mine (66 compared to 48).

Additionally, men gave higher ratings for the Minister's proposal to keep middle-class tax levels lower while investing in health care and social security nets by taxing the wealthy and large corporations, with an average rating of 73 compared to 59 among women. However, the rating between men and women diverged significantly when the Minister started enumerating health care examples, including helping Canadians find family doctors, tackling the backlog of surgeries, and combating the opioid crisis. Men gave an average rating of 81 for this portion of the speech, compared to 60 among women.

Throughout the remainder of the speech, the curves on the dial test exhibited comparable movements with only slight deviations.

2.1.3 Region

Some elements of the speech were rated higher by Eastern Canada (Atlantic provinces, Ontario and Quebec), than Western Canada (Manitoba, Saskatchewan, Alberta and British Columbia), while others were rated higher by Western than Eastern Canada.

Eastern Canada gave a higher rating to the mentions of post-COVID job recovery (65 for the East vs 53 for the West), public investment in many sectors including housing, worker skills, immigration and childcare (63 for the East vs 44 for the West), investments in the health care system announced by the Prime Minister last month (67 for the East vs 50 for the West), reinforcing the healthcare system and expanding its reach (54 for the East vs 42 for the West), and fighting for Canada to have a role in the new global clean economy (53 for the East vs 39 for the West).

On the other hand, Western Canada gave a higher rating to the drop in the inflation rate (58 for the West compared to 45 for the East), the fact that salaries outgrew inflation and that Canadian workers have more money in their pockets (60 for the West vs 45 for the East), the best debt to GDP ratio of the G7 countries (68 for the West vs 57 for the East), the equality in opportunities for those who work hard in Canada (67 for the West vs 55 for the East), and the fact that Canada is filled with good, hard-working people (78 in the West vs 67 in the East).

In general, of the items which prompted some level of divergence in ratings between participants from the East and the West, the items touching more on economic factors and salaries seemed more appealing to the latter, while items related to the health care seemed more appealing to the former. Moreover, the items touching on COVID-19 and on public investment seemed less pleasing to the participants from Western provinces while the pride-inducing mentions of Canada and its people seemed generally more appealing to them. The rest of the speech did not see much deviation between the dial test curves of the respondents from Eastern and Western provinces.

2.1.4. Education

There were significant differences between the ratings from the different education levels from the participants, the overall average rating of those with a university level education being

noticeably lower than that of those with college and high school education (49 for university level vs 63 and 65 for college and high school level, respectively).

The largest gaps in ratings between these sub-groups happened when the following items were mentioned:

- the announcement of a national early learning and childcare system and related economic opportunities for mothers (79 for high school vs 53 for college and university);
- coordinated monetary tightening by central banks (60 for college, 53 for high school and 28 for university);
- the diminishing inflation rate in Canada (62 for college, 51 for high school and 34 for university);
- close ones suffering from higher prices (60 for college, 45 for high school and 28 for university);
- keeping lower tax levels for middle class families and investing in health care and in the social safety net by taxing the wealthy and large corporations (89 for high school, 69 for college and 55 for university);
- Canada's tradition of fiscal discipline (78 for high school, 63 for college and 48 for university);
- investing in Canadian workers to acquire skills (77 for high school, 62 for college and 52 for university);
- the \$198 billion investment in the public health care system (65 for high school and college vs 45 for university);
- ensuring a world class public health system for all Canadians (81 for high school, 69 for college and 47 for university);
- reinforcing and expanding the public health care system (64 for college, 59 for high school and 37 for university);
- the creation of the new dental care program (95 for high school, 81 for college and 62 for university);
- the renewed geopolitical partnership with allies and democracies and related opportunities for Canadian workers (65 for high school, 55 for college and 43 for university);
- our close allyship with the United States (65 for high school and college vs 44 for university);
- reciprocity in access to national markets (72 for high school, 67 for college and 41 for university);
- the mention of large national projects including the expansion of Trans Mountain and of the different types of workers (approximately 69 for college, 62 for high school and 41 for university);
- and the equality in opportunities for those who work hard in Canada (approximately 70 for high school and college vs 43 for university).

There were no noteworthy variations observed in the ratings of these subgroups for the other topics discussed in the budget presentation speech.

2.1.5 Employment status

Regarding employment status, participants were grouped into three categories: those who are employed (working full time or part time or self-employed), students, and those who are not in the workforce (those who are unemployed, not in the workforce, or retired). Participants who are not in the workforce gave the highest average rating to the budget speech (64), followed by students (59), while employed individuals gave the lowest average rating among the three groups (53). Students had the most variation in their answers, while the employed group had the least amount of variation.

Employed participants gave lower ratings than students and those who are not in the workforce when Minister Freeland mentioned Canada's improvements (54 compared to 73 and 67 respectively). They also gave a lower rating to the high participation rate of women in the workforce (57 compared to 75 among students and 72 among those who are not in the workforce), and to the mention of making sure wealthy individuals and businesses pay their fair share of taxes (55 compared to 80 among students and those not in the workforce).

Participants who are not in the workforce gave higher ratings to the impact of the pandemic and the Russian president on the global economy and the cycles of monetary tightening announced by central banks than the rest (56 compared to 38 among students and 46 among workers), and when Minister Freeland mentioned the dependence on dictatorships for energy needs (63 compared to 45 among students and 39 among workers) and the opportunity it represents for Canada and its allies (70 compared to 43 among the rest).

Students gave a higher rating to the measure aiming at helping Canadian workers acquire the skills they need to get jobs (81 compared to 57 among the rest), and the announcement of the \$198 billion investment in healthcare (95 compared to 48 and 70 among workers and those not in the workforce). On the other hand, they gave a lower rating when the Minister mentioned making Canada the best place in the world for foreign investors thanks to its green economy (38 compared to 57 among the rest).

Reactions to the other elements of the budget speech that have not been mentioned above were similar across all groups.

2.1.6. Income

Participants were grouped into three income levels: low (less than \$40,000 a year), average (between \$40,000 and \$80,000), and high (over \$80,000).

Overall, participants with an average income level gave a higher rating to the following elements of the budget speech compared to those with a high income level: the economic improvements that Canada has made since the pandemic – namely, GDP growth and employment rate (72 compared to 48), the participation of Canadian women in the workforce (79 compared to 54), making sure that wealthier Canadians and large corporations pay their fair share of taxes (81 compared to 62), affordable child care (70 compared to 50), the \$198 billion investment in healthcare (76 compared to 57), the introduction of the new dental care plan (76 compared to 56), the coast-to-coast clean energy grid (70 compared to 55), and the mention that the government's plan means well-paying jobs for everyone (75 compared to 56). Finally, the average income group gave lower ratings to the last portion of the speech when Minister Freeland mentions Canadian workers she has met.

2.1.7 Area

Overall, participants living in rural areas gave a higher average rating to the speech than participants living in urban areas (60 vs 55). Among the most significant differences between participants living in rural and urban areas are the announcement on health care funding and particularly when the Minister said *we will ensure that all Canadians receive the care they need* (88 among rural participants vs 60 for urban participants), when the Minister talked about how the salaries of working Canadians have increased in the past month and how inflation has stabilized (74 among participants living in rural areas and 51 among participants living in urban areas), when she was talking about how the pandemic and the impact of President Putin have made them realize the importance of not being dependent on dictatorial regimes and that the independence of our economy represents an opportunity for Canadian workers (64 for rural participants vs 47 for urban participants), and during the segment on the energy grid, mainly when mentioning the *workers who build thousands and thousands of affordable energy efficient homes* (66 for rural participants vs 52 for urban participants). For other elements of the speech, rural and urban participants had similar opinions, with the dial test curves following each other with only a few points of difference, with no notable difference.

2.2 Poll results and discussion²

2.2.1 English-speaking adults under 40

Dial test results

English-speaking young adults had the lowest average score among all groups (53).

Among this group, the highest ratings were given to the mention of women returning in the workforce thanks to the affordable childcare announced in 2022 (77), the mention that the government helps Canadian workers acquire the skills they need (76) and the mention of Canadians' desire for lower interest rates (72). On the other hand, the lowest ratings were given to references to President Putin (27) and to the inflation and coordinated monetary tightening by central banks (33).

Poll results and discussion

² 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.

Prior to the speech, half of the participants were unsure whether Canada was going in the right or wrong direction. Among those who responded, half said that Canada was going in the right direction while the other half said the country was going in the wrong direction. Those who thought that Canada was going in the wrong direction mostly mentioned the rising costs of housing, food and everyday consumer goods as justifications for their answer. A few mentioned that they had never paid as much for groceries as they did now. Many also referred to the pandemic and the health measures that were in some cases still present in 2022 and the way that the COVID-19 vaccines divided Canadians. There were some who believed that the Government took advantage of the pandemic to push certain things through without proper scrutiny. Other issues, such as gun control legislation, were also raised. Those who mentioned that Canada was going in the right direction mostly explained their answer with the fact that Canada was doing well compared to other countries, saying the Government did a good job managing inflation.

Most participants rated the current state of the Canadian economy as being poor and one participant rated it as being very poor. Once again, inflation, high interest rates and the rising cost of living were the top reasons brought up by participants to explain their rating.

When comparing to last year, half of the participants were unsure whether the economy was stronger or weaker. Among those who expressed their opinion on the matter, most stated that the Canadian economy was weaker this year. Inflation and the cost of living were again mentioned. Thinking ahead in six months, most of the participants thought that the economy would be weaker, but a few thought that the economy would be stronger due to inflation stabilizing and their hope that interest rates will come down. On the same note, most participants stated that their financial situation caused them very significant or significant stress and almost the same proportion thought that their financial situation was weaker this year compared to 2022.

Prior to the budget, the statements that received the highest level of agreement from participants were that the Government was taking positive steps to support Canadian industry transition to a green economy and that the Government was taking positive steps to support young people. No participant agreed with the following statement prior to the budget: the Government is taking positive steps to help make housing more affordable and that the economic plan of the Government will make life more affordable. A recurring theme among participants was that government programs often assist low-income individuals or households, but the middle class is often not eligible. Many participants did not feel supported by the government on many of the issues outlined in the statements assessed, notably on helping middle-class families, taking positive steps to support seniors, taking positive steps to grow the Canadian economy and taking positive steps to strengthen public health care. The lack of doctors, specifically family doctors, and the long wait in emergency room are elements that seemed particularly frustrating for a majority of participants.

Most participants mentioned having negative expectations for the 2023 budget, while only a few mentioned having somewhat positive expectations.

The speech did not have a significant influence on the way participants view the direction in which the country is headed. The results were still divided on that matter. However, when asked to rate

the current state of the Canadian economy after the speech, most participants mentioned that it was good or fair and half of the participants mentioned that in six months, the economy of the country will be stronger.

Based on what they remembered from the speech, participants attributed the highest increase in level of agreement to the following: the Government is taking positive steps to make Canadian industries and businesses more competitive; the Government is taking positive steps to grow the Canadian economy and the Government is taking positive steps to create good, well-paying jobs. Other statements assessed received approximately the same rating from participants.

Most participants agreed that what they saw or heard in the 2023 budget speech was positive, but only half thought that the measures announced would have an impact on their personal or household financial situation. All participants agreed that the language used in the speech was clear and easy to understand.

The tone and clarity of the speech were appreciated by the participants. However, a few of them did not like the fact that the Government seemed to be self-congratulatory. The Minister saying that the inflation rate was coming back down was received particularly negatively among the group. Some participants felt like the prices were still high and did not see an improvement on that matter. On the price of groceries and the Grocery Rebate in particular, one participant felt that major supermarket corporations who make huge profits that should finance the rebate, rather than the federal government.

The dental care plan, although initially seen as positive, was later considered a lower priority health issue. Some were under the impression that it was announced only because it is a problem with an easier solution for the Government since there is no lack of dentists as there is a lack of doctors in the country.

Overall, a feeling of caution and skepticism emerged from the group. Many mentioned the fact that there seemed to be a lack of details in order to form a clear opinion on the measures announced. Some were still unsure whether they were eligible for the various measures announced and preferred to wait before stating whether they would be satisfied with the various announcements and whether they would have an impact on their household.

2.2.2 English-speaking Canadians over 40

Dial test results

Overall, participants were somewhat indifferent to the federal budget speech. Throughout the broadcasting of the budget, the average rating among the English-speaking Canadians 40 years and older group was 53.8 out of 100, with little variation throughout the speech.

The items that received the most positive responses for this group were the dental plan announcement (71), the creation of the Volkswagen battery plant in Ontario (64) and the lithium

mine in Quebec (64). The mention of essential workers such as healthcare workers, teachers, service workers, also got rated positively by participants (63).

On the other hand, the lowest ratings were given when the Minister mentioned the consequences of the price rises (33), neighbouring countries' needs for Canadian resources (43), and when the pandemic and the Russian president's impact on the global economy were mentioned (45).

Poll results and discussion

Prior to the speech, participants were asked whether they thought Canada was headed in the right or wrong direction. Most stated the country was going in the right direction, and the rest said it was headed in the wrong direction. The former justified their answer with their support of several measures that Canada has taken in the past year such as supporting Ukraine's resistance against Russia's invasion, increasing immigration to curb labour shortages (especially in less populated areas), as well as the investments in healthcare, infrastructure, immigration and education that they could notice at their local level. On the other hand, those who thought the country is headed in the wrong direction stated their worries about the national debt. One participant mentioned the Canada Emergency Response Benefit has reduced people's willingness to work as they felt entitled to the benefits, negatively impacting the economy. Another participant considered that Canadian democracy was at stake due to government "overreach" and membership in the United Nations that poses a threat to national sovereignty, while Canadian individuals and businesses were left to figure things out on their own.

Regarding the current state of the Canadian economy, a small majority of respondents rated it is good or fair, while the rest considered it to be poor or very poor. Those who were optimistic considered that Canada was faring well compared to other countries and considered the amount of national debt to be a problem for the future as several issues need to be addressed in the present. One participant mentioned that the banking system in Canada is safer than elsewhere, comparing it to the recent Silicon Valley and Swiss Bank crashes. Another participant considered that while Canada could be doing a lot better on some issues such as fighting climate change and promoting reconciliation, it was still doing relatively well on the international scene. On the other hand, those who considered the Canadian economy to be doing poorly mentioned the national debt, the perception that money was spent during COVID-19 on people who did not need it, and the high levels of inflation and unemployment.

Participants were asked to compare the current state of the economy to that of the previous year, and responses were divided into thirds. One-third of participants reported that the economy was stronger, another third reported it was weaker, and the final third said that there was no change. Similarly, participants were divided when asked about the economy's future over the next six months, but a small majority predicted that it would remain unchanged. The remaining

participants were split between those who thought the economy would strengthen and those who predicted it would weaken.

When it came to their personal level of stress due to the current state of their personal finances, a vast majority of participants said it was not very significant, while one participant said it was significant. Participants were also divided regarding the state of their finances compared to the previous year. Some participants reported that their finances were stronger, while others reported that they were weaker. A few participants reported no change in their financial situation.

Regarding their agreement levels with the federal government's efforts in various areas, some fields stood out more than others. The efforts that were recognized by the highest number of participants were that the government was taking positive steps to create good, well-paying jobs. A small majority of participants agreed that the government is taking positive steps to grow the Canadian economy, to support the Canadian industry's transition to a clean economy, to address inflation concerns, and to make Canadian industries and businesses more competitive. More participants agreed than disagreed with Canada taking positive steps to make it easier for businesses to invest in research and innovation in Canada, and to support young people.

However, more participants disagreed than agreed with policy efforts focusing on helping middle-class families, the economic plan making life more affordable, making the wealthy and big businesses pay their fair share of tax, strengthening public healthcare, making housing more affordable, and supporting seniors. Additionally, all participants disagreed that Canada is doing what it can to reduce its spending.

Expectations towards the federal budget were more negative than positive: while a few participants stated their expectations were somewhat positive, a higher number said they were negative, and a couple said their expectations were very negative. Those who had positive expectations said they were trying to be optimistic and trust the government, and one mentioned the average \$10 a day daycare measure announced last year as a source for their optimism. In contrast, those who had negative expectations mentioned the government's track record as a justification. One participant said they had seen no example of things getting better as prices are going up while wages are going down, and another considered the government's communications to just be "*empty words*". The same participant however wondered how fair it would be to hold the government accountable considering the state of the global economy and the various geopolitical issues influencing the national economy.

After watching Minister Chrystia Freeland's speech, a vast majority of indicators improved. A higher proportion of participants considered that Canada was headed in the right direction, with only a couple of participants considering it was going in the wrong direction. The current state of the Canadian economy was also rated more positively, as more participants rated it as "good". Viewing the speech also had a positive impact on the perception of the evolution of the Canadian economy over the next six months as most participants said it would be stronger.

Agreement levels with the statements evaluating the government's performance in various areas also increased after viewing the speech. A higher proportion of participants agreed with a vast majority of the statements compared with the pre-speech evaluation. Statements that participants agreed with in majority prior to the budget speech benefited from higher levels of agreements. Regarding the statements that more participants disagreed with before the speech, some benefitted from higher levels of agreement. A higher proportion of participants now agreed that the government is pursuing policies that focus on helping middle class families, that they are taking positive steps to make the wealthy and big businesses pay their fair share of tax, to strengthen public health care, and to support seniors. Some statements were still disagreed with by more participants, but to a lesser extent: a lower but still majority proportion disagreed that the economic plan would make life more affordable, and that the government is doing what it can to reduce its spending. Finally, participants were torn regarding whether the government was taking positive steps to help make housing more affordable. For all statements both prior and after the speech viewing, participants were cautious with their agreement as only a few stated they "strongly agreed" with the statements.

A vast majority of participants agreed that what they heard during the speech was very positive or somewhat positive, with only one person considering the speech content to be very negative. However, the positive outlook of participants on the speech was reflected more in the poll results than in the discussion. Participants considered that while the budget speech was very positive and used a lot of "*flowery language*" and laudatory vocabulary towards Canada and its economy, it did not hold many concrete measures that they could have an opinion on.

More participants considered that the budget speech met their expectations, with a minority saying it exceeded or did not meet expectations, in contrast to pre-budget negative expectations for most participants. During the discussion, most participants expressed their indifference to the speech as they felt it was typical of statements made by elected officials. A few participants stated they were not surprised by the speech at all as the few measures that were mentioned by Minister Freeland had already been announced (e.g., dental plan, opening plants). One participant had a positive opinion on the speech and expressed less reservations.

A small majority of participants considered that there wasn't anything in the budget that would have an impact on their personal or household finances in the poll question, and the real proportion was even lower after discussion.

Finally, a vast majority of participants strongly agreed that the language used in the budget speech was clear and easy to understand, though at times overly simplified and didactic. Conversely, a few found the tone encouraging.

2.2.3 French-speaking adults under 40

Dial test results

Francophone adults under 40 years old gave an average rating of 55 to the speech.

They gave the highest ratings to the record high participation rate of women in the workforce (68), the mention of making sure that wealthy individuals and big businesses pay their fair share of taxes (74), helping Canadian workers gain skills (68), the investment in public health care (71), dental care (80), the mention of making Canada a reliable supplier of clean energy to the world (69), and the mention of good paying jobs and careers for everyone across the country (67).

On the other hand, the lowest ratings were given when the Minister mentioned the pandemic-related recession (40), the inflation level (28), and the mention that wages increased at a higher rate than inflation (34), and the danger of being reliant on dictatorships for energy needs (41).

Polls results and discussion

Prior to the budget announcement, participants in this group were divided on the matter of where Canada was headed. Some said Canada was heading in the right direction, while other participants felt it was headed in the wrong direction. The participants who felt Canada is headed in the wrong direction mentioned the rising cost of living and the fear of a recession. The participants who thought Canada is headed in the right direction explained their answer by mentioning how Canada is a country of opportunities, work and life wise.

Many participants gave a fair or poor rating to the Canadian economy stating that everything was now more expensive, particularly for young people. When comparing the current state of the Canadian economy to the same time last year, more participants felt it was weaker now while only a minority felt it was stronger. While very decisive on the current state of the economy compared to last year, participants were more divided on how the Canadian economy will be in 6 months from now. While some participants expect it to stay the same or to get weaker, some see it getting stronger.

When thinking about their personal finances and the stress it causes them, more than half of the participants said their stress level due to the current state of their personal finances was either very significant or significant. None of them said their stress level was not very significant or not significant at all. Compared to the same time last year, most participants feel their personal finances haven't changed or are weaker, while some think they are stronger.

Prior to the budget, only a few participants agreed that the federal government took positive steps to grow the Canadian economy, to support the Canadian industry's transition to a clean economy, to make the wealthy and big businesses pay their fair share of tax, to help make housing more affordable, and to support seniors. All disagreed that the government is doing what it can to reduce its spending. Finally, the results of the surveys were more divided regarding its support to young people and the steps taken to strengthen public healthcare.

Thinking about the federal budget, more of the participants had negative expectations, while only a few had somewhat positive expectations. Some participants mentioned that they hoped the budget would help those who need it most. Some participants also mentioned that they would like to see more measures to help Canadians with their mental health and more affordable housing measures.

After viewing the budget, participants of this group were still divided on whether Canada is going in the right direction or not. No participant rated the Canadian economy as very good or good. Indeed, some felt the budget speech made the state of our economy seem fair while others felt it looked poor or very poor. While results show a more pessimistic view of the Canadian economy, participants' opinion on whether the situation will be stronger or weaker in the next six months remained unchanged.

The measures announced in the budget seemed to have a positive impact on the participants' opinions of the federal government in certain areas. More specifically, more participants agreed that the government is taking measures to grow the Canadian economy, that they are taking steps to support Canadian industry transition to a clean economy, that they are addressing inflation concerns and that they are taking positive steps to strengthen public health care. After viewing the budget, almost all participants also agreed that the economic plan will benefit their personal finances and that the government is taking positive steps to grow the Canadian economy. No areas saw a decline in opinion after the budget.

Most participants agreed that what they heard in the budget speech was somewhat positive. Most participants of this group thought that the budget speech did not meet their expectations, while some thought that it did. No participants thought the budget exceeded their expectations.

Most participants thought that the measures announced in the budget will not have a direct impact on their household, while only one said it would.

Among other positive elements, participants mentioned investments in health care and environmental measures, notably the emphasis on dental care.

Among the negative elements, the participants of this group mainly noted insufficient or missing measures, such as more affordable housing or measures for mental health specifically.

Moreover, participants mentioned the absence of concrete measures. They felt like there was no plan and had a hard time seeing if anything would have an impact on their lives. In general, the participants had a somewhat negative impression of the situation, despite some positive aspects. Their attitude was largely one of skepticism, as they were waiting to see how things would be put into action.

To conclude, most agreed that the language used in the speech was clear and easy to understand.

2.2.4 French speaking adults over 40

Dial test results

Based on the dial test rating, the French-speaking Canadians 40 years and older were the group who responded the most positively to the budget presentation speech, with an overall dial test rating average of 70. Despite the enthusiasm shown during the speech, it did not appear to carry over into the subsequent group conversation. The most significant variations happened during the first half of the speech, while the second half saw smaller variations in the dial test scores.

The items that received the most positive responses included the mention of the wealthy and large corporations paying their fair share of taxes in order to invest in the health care system and in the social security net while keeping a lower tax level for middle-class families (91), the record high participation of women in the labour force (79), and the creation of a new Canadian dental care plan (84).

Conversely, the Minister's remarks about the impact of inflation on friends and neighbours received the lowest ratings (43), and there was a significant decline in ratings for the idea of Canada welcoming immigrants and skilled workers (55) among this particular group.

Polls results and discussion

Before viewing the budget presentation speech, more participants stated that Canada was going in the wrong direction. Many reasons for this were brought up, mostly touching on the rising cost of living, precarious economic situation and the general feeling that the country is facing multiple crises, including housing, national security, immigration and the decline of French language. Only one participant mentioned that the country was going in the right direction, explaining that the country was emerging from the pandemic and that the situation was therefore improving. While before the speech only one participant had stated that Canada was going in the right direction, after the speech, more respondents answered that Canada was going in the right direction and only one participant answered that it was going in the wrong direction.

The participants were divided regarding the state of the Canadian economy. Most stated that the state of the economy was fair, explaining that although quite fragile, it was maintaining itself at an acceptable level for now. A few participants, however, underlined the rising cost of living and related problems. A few others highlighted the fact that large corporations took advantage of the pandemic to make record profits at the expense of ordinary Canadians and that these corporations bore a significant part of the responsibility for the precarious economic situation. There were no significant changes in the answers to this question following the viewing of the budget speech.

In terms of how the Canadian economy had evolved compared to one year ago, half of the participants mentioned it was now weaker while the other half saw no change. None of them thought the economic situation had improved. When asked how they thought the Canadian economy would evolve in the next 6 months, more respondents answered that it was going to be weaker, while others said it was going to be the same or that they did not know. After seeing the

speech, the group's participants unanimously answered that there would be no change to the Canadian economy in the next six months.

As many participants reported being stressed about their personal finances as those who reported a neutral or non-significant level of stress. Most of them also answered that their anxiety level regarding this had not changed compared to last year, while some said it was weaker and one stated it was stronger. The participants who reported a significant level of stress over their personal finances often brought up the rising cost of living, including the cost of housing, high interest rates, the strain that the pandemic had and, in some cases, continues to have on their income, the cost of groceries and essential purchases, and the fact that salary raises don't match inflation. One participant stated that they could only pay for their basic needs without any revenue left for anything extra. Some respondents attributed their low level of anxiety over their personal finances to being debt free, adding that the current high interest rates probably were a significant cause of stress for those with a mortgage or credit card debts.

Among the various statements tested, the ones that received the highest approval ratings both before and after the speech were those stating that the government is prioritizing policies that assist middle-class families and making it easier for businesses to invest in research and innovation in Canada. The statements that saw the most significant improvement in approval ratings after the budget presentation were those affirming the government's efforts to grow the Canadian economy and strengthen public health care. Almost all other statements either remained unchanged or experienced a slight increase in approval ratings after the speech, with the exception of the statement regarding the government's spending reduction efforts, which saw a slight decrease in approval.

The group was divided regarding their expectations ahead of the budget. They were in equal parts somewhat positive, somewhat negative or unsure. After viewing the speech, all participants rated what they heard as either somewhat or very positive. In the discussion following the viewing, most participants seemed to cautiously approve of the budget, while expressing some doubts as to the concretization of the measures announced. The general impression seemed to be that the measures would not have much of an impact on people's daily lives, especially on those from the middle class. Some participants added that the measures seemed very good, but that they were waiting to see to what extent they would be rolled out effectively and that it was too early to tell whether they would have a significant positive impact on the country's situation. Such scepticism on the measures' implementation was echoed by others among the group. Some participants added that if the measures were all implemented as described in the speech, the country's situation would surely improve, but that they did not think it was going to happen. Moreover, others commented that the government has limited reach on many current issues that are of a more global nature.

While most participants generally agreed that the speech had been clear and understandable, some stated their impression that the speech had been typical rhetoric and self-congratulations. Some participants noted that the timeline for the implementation of the announcements seemed unclear to them. Also, questions remained around the grocery rebate, as some participants did not understand how it would be rolled out and how it would help them deal with the dire effects of inflation.

The measures that the participants spontaneously talked about in a positive way were the new dental care program and investments in health care, highlighting their high level of satisfaction and relief relating to these measures, and that they were looking forward to their implementation. On the other hand, significant concern was expressed by the participants on the lack of measures for rising housing costs and to help the middle-class face inflation. Some participants also expressed the hope that a significant part of the investments announced in the budget would go toward mental health, explaining that the problems related to it seemed to have been on the rise.

When asked whether the government should take financial decisions with affordability for Canadians or the increase of the country's competitiveness in mind, most of the group agreed that affordability should be the priority since it is the most impactful factor on people's daily lives. There was a division within the group regarding the intended audience of the Minister's speech, with some asserting that it was directed towards the general population, while others believed it was primarily aimed at other politicians.

To conclude, some participants reiterated their concern over the costs of housing, pressing needs in mental health, while others stated that following the budget speech, the government needs to turn words into impactful actions.

Conclusion

In conclusion, the budget was received with cautious optimism and a certain level of skepticism by the participants. The introduction of the new dental care program, investments in healthcare, and the advancement of skills for the Canadian workforce, along with references to post-COVID job recovery and record-high labour force participation for women, received a largely favourable response among the groups. However, mentions of inflation, central banks tightening monetary policies, and disruptions to the global economy caused by the pandemic and dictatorships were viewed more negatively.

According to the polling results, the budget speech seemed to have a positive impact on participants' opinions towards the federal government's actions to steer Canada and its economy in the right direction moving forward. However, participants were unsure that the budget measures would impact their daily lives and their personal finances, especially in the context of inflation. Indeed, the post-budget group discussions focused more on what seemed to be missing from the budget. More particularly, the participants felt there were insufficient measures to help the middle-class cope with the dire effects of inflation and widespread rise in the cost of living, but some expressed doubts regarding the Canadian government's capacity to effectively address the negative impacts of global issues. While many participants stated the budget met their expectations, reservations remained as to its concrete implementation and the effects on their daily lives and personal finances.

Appendix

A.1 Qualitative Methodology

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. 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.

Recruitment was carried out by professional recruiters. The recruitment guide (available in the appendix B) ensured that the participants met the profiles sought for each session and that they were equipped to participate in an online discussion session. To do so, they had to confirm that they had a high-speed Internet connexion, a computer or a laptop. Participants were awarded a \$225 incentive.

Moderation

All focus group sessions were moderated and supervised by a senior Leger researcher assisted by a research analyst. The discussion guide (available in the appendix A3) consisted of a semi-structured discussion guide. It allowed the moderator to follow the thread of the discussion and ensured that an array of themes were covered while leaving sufficient room for the participants to express themselves and develop in detail their experiences, ideas, opinions and perceptions.

A.2 Screening Guide

DISCUSSION GROUPS DESCRIPTION (General Population)

The discussion groups will be held online via Mercury Analytics' Platform.

The target population for this whole research project is comprised of two groups of Canadian adults, 18-39 and 40 and over:

The objective is to recruit 10 participants per discussion group.

	DATE / HEURE	PARTICIPANT PROFILE
GROUP 1 10 participants		Group in English with Adults under 40 <ul style="list-style-type: none">• Adults aged 18-39 (varied socio-demographics)• Gender: 50:50• Education: Mixed• Occupation: Mixed• Income: Mixed
GROUP 2 10 participants		Group in French with Adults under 40 <ul style="list-style-type: none">• Adults aged 18-39 (varied socio-demographics)• Gender: 50:50• Education: Mixed• Occupation: Mixed• Income: Mixed
GROUP 3 10 participants		Group in English with adults 40 and over <ul style="list-style-type: none">• Adults aged 40+ (varied socio-demographics)• Gender: 50:50• Education: Mixed• Occupation: Mixed• Income: Mixed
GROUP 4 10 participants		Group in French with adults 40 and over <ul style="list-style-type: none">• Adults aged 40+ (varied socio-demographics)• Gender: 50:50• Education: Mixed• Occupation: Mixed• Income: Mixed

For each participant, collect the following information:

Participant name:
Phone number at home:
Cell phone:

Email address:	
Recruitment date:	Recruiter:
Group #:	Confirmation (date):

STEP 1 (WEB) – SCREENING AND PROFILING

INTRO

Hi, I'm _____ of Leger, a public opinion company. We are currently organizing discussion groups on behalf of the Government of Canada. The objective of the discussion group is to collect opinions and perceptions about the economy and the 2023 Federal Budget.

We are preparing to hold a few discussion groups with people like you. These discussion groups will be conducted "online" and will be led by a research professional with up to ten participants. All opinions will remain anonymous and will be used for research purposes only in accordance with laws designed to protect your privacy. We don't have anything to sell and we don't advertise.

Your participation is voluntary. All information collected, used and/or disclosed will be used for research purposes only. We are also committed to protecting the privacy of all participants. The names of the participants will not be provided to any third party. May I continue?

[INTERVIEWER NOTE: IF ASKED ABOUT PRIVACY LAWS, SAY: "The information collected through the research is subject to the provisions of the Privacy Act, the legislation of the Government of Canada, and to the provisions of relevant provincial privacy legislation.]

The discussion group will take place online on March 28th 2023 at 4pm and will be a maximum of **2 hours**. You will be compensated **\$225** for your time.

Q0

Are you available to participate in this focus group March 28th 2023 at 4pm?

Yes	1
No	2 THANK AND TERMINATE

A1. Are you interested in participating?

Yes	1	CONTINUE
No	2	

I would now like to ask you a few questions to see if you meet our eligibility criteria to participate.

A2. The group discussions we are organizing are going to be held **over the Internet**. They are going to be "online focus groups". Participants will need to have a **computer**, a **high-speed Internet connection**, and a **WebCam** in order to participate in the group. Would you be able to participate under these conditions?

Yes	1	CONTINUE
No	2	THANK AND TERMINATE

PROFILING

INTRO1. Socio-demographic questions

1. Do you or anyone in your immediate family work or have you ever worked in ...?

Marketing Research	1 THANK AND TERMINATE
Marketing and Advertising	2 THANK AND TERMINATE
Public relations, communications	3 THANK AND TERMINATE
Media (newspapers, television, radio, etc.)	4 THANK AND TERMINATE
Federal or Provincial civil service	6 THANK AND TERMINATE
None of the above	9

Sex

2. Are you...?.

... a man	1
... a woman	2
... non-binary	3
... transgender	4
I prefer not to disclose	5

Province

3. In which province or territory do you live?

British Columbia	1
Alberta	2
Saskatchewan	3
Manitoba	4
Ontario	5
Quebec	6
New Brunswick	7
Nova Scotia	8
Prince Edward Island	9

Newfoundland	10
Northwest Territories	11
Yukon	12
Nunavut	13

4. Area

4. Do you currently live in a urban or rural area?

Urban	1
Rural	2

5. Language

5. What is your *first official language spoken*?

French	1	QUALIFY FOR GR2-4
English	2	QUALIFY FOR GR1-3

6. AGE.

6. What age category do you fall into?

Under 18	99	THANK AND TERMINATE
18 to 24	1	<i>Eligible for group 1 if spoken language is English. Eligible for group 2 if spoken language is French.</i>
25 to 34	2	<i>Eligible for group 1 if spoken language is English. Eligible for group 2 if spoken language is French.</i>
35 to 39	3	<i>Eligible for group 1 if spoken language is English. Eligible for group 2 if spoken language is French.</i>
40 to 54	4	<i>Eligible for group 3 if spoken language is English. Eligible for group 4 if spoken language is French.</i>

55 to 64	5	Eligible for group 3 if spoken language is English . Eligible for group 4 if spoken language is French .
65 and over	6	Eligible for group 3 if spoken language is English . Eligible for group 4 if spoken language is French .

7. EDUCATION.

7. What is the highest level of education you completed?

Some high school or less	1
High school diploma or equivalent	2
Registered Apprenticeship or other trades certificate or diploma	3
College, CEGEP or other non-university certificate or diploma	4
University certificate or diploma below bachelor's level	5
Bachelor's degree	6
Postgraduate degree above bachelor's level	7

9. TECH

9. To what extent would you say you are comfortable with technology?

Very comfortable	1	
Somewhat comfortable	2	
Somewhat uncomfortable	3	THANK AND TERMINATE
Very uncomfortable	4	THANK AND TERMINATE

[ASK IF AGE=6]

9b. TECH 2

9b. Have you ever used a videoconference platform (Zoom, MS Teams, etc.)?

Yes	1	
No	2	THANK AND TERMINATE

10. OCCUPATION

10. Which of the following categories best describes your current employment status? Are you...

Working full-time (35 or more hours per week)	1
Working part-time (less than 35 hours per week)	2
Self-employed	3
Unemployed, but looking for work	4
A student attending school full-time	5
Retired	6
Not in the workforce (full-time homemaker, full-time parent, or unemployed and not looking for work)	7
Other employment status. Please specify.	8

11. INCOME

11. 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.

Under \$20,000	1
Between \$20,000 and just under \$40,000	2
Between \$40,000 and just under \$60,000	3
Between \$60,000 and just under \$80,000	4
Between \$80,000 and just under \$100,000	5
Between \$100,000 and just under \$150,000	6

\$150,000 and above	7
---------------------	---

Privacy Notice

The personal information you provide to the Government of Canada is governed in accordance with the *Privacy Act*. We only collect the information we need to conduct the research project.

Purpose of collection: We require your personal information to determine your eligibility and record your consent to participate in this research.

Other uses or disclosures: Your personal information will not be shared. In limited and specific situations, your personal information may be disclosed without your consent in accordance with subsection 8(2) of the *Privacy Act*.

Do you consent to participate in this research?

- Yes (continue)
- No (STOP)

Participant Name: _____

Date: _____

INVITATION

Thank you. We'd like to invite you to participate in the discussion group.

The discussion group will take place online, on **March 28th 2023 from 4pm to 6pm.**

Just a quick reminder that you will need a computer, a high-speed Internet connection in order to participate in the chat group. You cannot participate using a mobile phone.

Representatives from the Government of Canada and research analyst may observe the discussion group, but will not have access to any of your personal information. Do you consent to participate in this discussion group ?

Yes	1
No	2 THANK AND TERMINATE

Now I have a few questions that relate to privacy, your personal information and the research process. We will need your consent on a few issues that enable us to conduct our research. As I run through these questions, please feel free to ask me any questions you would like clarified.

We need to provide the **online platform** and **session moderator** with the names and profiles of the people attending the discussion group because only the individuals invited are allowed in the session and the facility and moderator must have this information for verification purposes. Please be assured that this information will be kept strictly confidential. **GO TO P1**

P1) Now that I've explained this, do I have your permission to provide your name and profile **to the online platform and moderator?**

Yes	1 GO TO P2
No	2 THANK AND TERMINATE

P2) A recording of the discussion group session will be produced for the research project purposes. The recording will only be used by **the team of people working on the project at Léger and the Government of Canada** to assist in preparing a report on the research findings.

Do you agree to be recorded for research purposes only?

Yes	1 COMPLETE THE INVITATION
No	2 Read information below and P2A

It is necessary for the research process for us to record the discussion group session as the researcher needs this material to complete the report.

P2a) Now that I've explained this, do I have your permission for recording the discussion group?

Yes	1 COMPLETE THE INVITATION
No	2 THANK AND TERMINATE

As we are only inviting a small number of people to take part, your participation is very important to us. If for some reason you are unable to participate, please call so that we can get someone to replace you. You can reach us at _____ at our office. Please ask for _____.

We will send your login information to the online chat group to your email address. Please confirm receipt of this information when it reaches you.

Your _____ email _____ address _____ :

Thank you very much!

Name:

Phone number (during the day):

Phone number (during the evening):

Email address:

A.3 Discussion Guide

BLOCK 1	Introduction and Explanation
Length	10 MINUTES

WELCOME AND PRESENTATION

- Reception of participants

- **Introduction of the moderator:** Hello everyone and welcome to this discussion group. I hope everyone is doing well. Let me introduce myself, my name is _____ and I am _____ at Léger

- **Presentation of Léger** - Léger is a public opinion and consumer research firm. Some of you probably already know Léger from our surveys and our presence in the various media across the country. In addition to surveys, we organize discussion groups, like this one, on a variety of different topics.

PRIMARY AIM

The research is being conducted by Léger on behalf of the Government of Canada. The objective of the meeting is to learn about your opinion and perception on the Federal Budget.

RULES OF DISCUSSION

- 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. It is important to give your personal, spontaneous and honest opinions as well as reacting respectfully to the opinions of others.

PRESENTATION OF THE GROUP ROOM

- The session is being recorded for analysis purposes, in case we need to double-check the proceedings against our notes. These recordings remain in our possession and will not be released to anyone without written consent from all participants.
- There are observers representing the government who will be watching the discussion remotely.
- 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.

RESULTS CONFIDENTIALITY

- The discussions we will have this evening will remain confidential at all times.
- Your name will never be mentioned in the report
- Information collected for study purposes only

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.

Do you have any questions before we get started?

INTRODUCTION OF PARTICIPANTS

- What's your first name?
- Your place of residence (province and city)?
- What is your main occupation if you are working at this time?

BLOCK 2	Warm-up Exercise
----------------	-------------------------

LENGTH	5 MINUTES
---------------	------------------

The first part will get you comfortable with the technology, explain how they work, in both real time as well as with closed ended questions.

We will be **using technology** so you can share your impressions of the Federal Budget that will be announced shortly. We will measure your reaction to the speech. **EXPLAIN THE TECHNOLOGY BRIEFLY.**

We will get you to answer some questions before and after listening to the Budget speech.

After, we will discuss what you saw/heard, using how you reacted using the dials as reference points.

So the first step is to answer initial questions, then we will watch the speech (which will be 30-45 minutes in length), answer some questions and have a discussion.

BLOCK 3	PRE-SPEECH QUESTIONS
----------------	-----------------------------

LENGTH	10 MINUTES
---------------	-------------------

You will now see a question appear on your screen. Please answer this question personally before we discuss your answers.

Q1. Some people say that Canada is generally headed in the right direction. Other people say that Canada headed in the wrong direction. Which of those two statements is closer to your own opinion?

1 - Right direction

2 - Wrong direction

0 – Don't know

DISCUSS THE RESULTS OF THE QUESTION WITH THE PARTICIPANTS

PROBE: Why do you think that? What makes you say this?

Q2. How would you rate the current state of the Canadian economy, today?

Very good
Good
Fair
Poor
Very poor
Don't know

Q3. Compared to this time last year in 2022, do you think the Canadian economy is stronger, weaker, or has not changed?

3 - Stronger
2 - Weaker
1 - No change
0 - Don't know

Q4. Over the next six months, do you think the Canadian economy will be stronger, weaker or will there be no change?

3 - Stronger
2 - Weaker
1 - No change
0 - Don't know

DISCUSS THE RESULTS OF THE QUESTION WITH THE PARTICIPANTS

PROBE: Why do you think that? What makes you say this?

Q5. How would you rate your level of stress due to the current state of your personal finances?

Very significant
Significant
Neutral
Not very significant
Very significant

Q6. Compared to this time last year in 2022, would you say the current state of your own finances are stronger, weaker, no change?

Much stronger
Stronger
No change
Weaker

Much weaker
Don't know

DISCUSS THE RESULTS OF THE QUESTION WITH THE PARTICIPANTS

PROBE: Why do you think that? What makes you say this?

As you know, we have three levels of government in Canada – federal, provincial and municipal. Today, I want to focus specifically on the federal government. (The federal government is responsible for issues that affect the entire country, such as citizenship, national defence, international trade). The provincial government is responsible for areas of jurisdiction such as education, some natural resources and traffic laws. Both the provincial and federal governments have a role to play in funding the health care system. Municipal governments are responsible for managing areas of jurisdiction such as libraries, parks, water systems, roads and parking.)

Q7. For each of the following statements please indicate whether you agree or disagree with them.

- 4 – Strongly agree
- 3 – Agree
- 2 – Disagree
- 1 – Strongly disagree
- 0 - Don't know

Economic

- The federal government is taking positive steps to grow the Canadian economy
- The federal government is taking positive steps to make it easier for businesses to invest in research and innovation in Canada
- The federal government is taking positive steps to support Canadian industry transition to a clean economy
- The federal government is pursuing policies that focus on helping middle class families
- The federal government is taking positive steps to create good, well-paying jobs
- The federal government is taking positive steps to address inflation concerns
- The federal government's economic plan will make life more affordable
- The federal government is taking positive steps to make the wealthy and big businesses pay their fair share of tax*
- The federal government is doing what it can to reduce its spending

Issue specific

- The federal government is taking positive steps to strengthen public health care
- The federal government is taking positive steps to make Canadian industries and businesses more competitive
- The federal government is taking positive steps to help make housing more affordable

Demographic

- The federal government is taking positive steps to support young people
- The federal government is taking positive steps to support seniors

DISCUSS THE RESULTS OF THE QUESTION WITH THE PARTICIPANTS

PROBE: Why do you think that? What makes you say this?

Q8. Now thinking about the federal Budget before you hear the Deputy Prime Minister and Minister of Finance speak, to what extent would you say that your expectations are positive or negative coming into this?

5 – Very positive

4 – Somewhat positive

2 – Somewhat negative

1 – Very negative

0 - Don't know

DISCUSS THE RESULTS OF THE QUESTION WITH THE PARTICIPANTS

PROBE: Why do you think that? What makes you say this?

BLOCK 4	BUDGET SPEECH
LENGTH	30 MINUTES

EXPLAIN THE DIAL EXERCISE TO PARTICIPANTS - REMIND THEM THAT THEY SHOULD CONTINUOUSLY EVALUATE THROUGHOUT THE BUDGET SPEECH ACCORDING TO THEIR OPINION OF WHAT THEY HEAR: POSITIVE OR NEGATIVE. THEY SHOULD USE THE SCALE TO NUANCE THEIR OPINION.

PRESENT THE EXPLANATORY VIDEO

BLOCK 5	POST-SPEECH QUESTIONS
LENGTH	10 MINUTES

NOTE TO MODERATORS: NO NEED TO DISCUSS THE ANSWERS TO EACH OF THESE QUESTIONS.

Now, before we have a discussion, I would like to ask you some more questions ...

NOTE TO READER: WE RE-ASK SOME QUESTIONS FROM THE PRE-BUDGET EXERCISE TO SEE IF THE BUDGET SPEECH SHIFTED ANY VIEWS ON THEIR PERCEPTIONS ON THE ECONOMY.

Q9. Now after watching the speech, we would like to ask you the same question as earlier. After hearing the speech today, is Canada heading in the right or wrong direction in your own opinion?

- 1 - Right direction
- 2 - Wrong direction
- 0 - Don't know

Q10. How would you rate the current state of the Canadian economy from what you have heard today?

- Very good
- Good
- Fair
- Poor
- Very poor
- Don't know

Q11. After hearing the Budget speech, over the next six months, do you think the Canadian economy will be stronger, weaker or will there be no change?

- 3 - Stronger
- 2 - Weaker
- 1 - No change
- 0 - Don't know

Q12. For each of the following statements please indicate whether you agree or disagree with them.

4 – Strongly agree

3 – Agree

2 – Disagree

1 – Strongly disagree

0 - Don't know

Economic

- The federal government is taking positive steps to grow the Canadian economy
- The federal government is taking positive steps to make it easier for businesses to invest in research and innovation in Canada
- The federal government is taking positive steps to support Canadian industry transition to a clean economy
- The federal government is pursuing policies that focus on helping middle class families
- The federal government is taking positive steps to create good, well-paying jobs
- The federal government is taking positive steps to address inflation concerns
- The federal government's economic plan will make life more affordable
- The federal government is taking positive steps to make the wealthy and big businesses pay their fair share of tax*
- The federal government is doing what it can to reduce its spending

Issue specific

- The federal government is taking positive steps to strengthen public health care
- The federal government is taking positive steps to make Canadian industries and businesses more competitive
- The federal government is taking positive steps to help make housing more affordable

Demographic

- The federal government is taking positive steps to support young people
- The federal government is taking positive steps to support seniors

Q13. 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?

- 5 – Very positive
- 4 – Somewhat positive
- 2 – Somewhat negative
- 1 – Very negative
- 0 - Don't know

Q14. To what extent do you agree or disagree that the language used in the budget speech was clear and easy to understand?

- 4 – Strongly agree
- 3 – Agree
- 2 – Disagree
- 1 – Strongly disagree
- 0 - Don't know

Q15. And would you say that what you saw and heard exceeded your expectations, met your expectations, or did not meet your expectations?

- 1 – Exceeded expectations
- 2 – Met expectations
- 3 – Did not meet expectations
- 0 – Not applicable

Q16. Was there anything you heard in the budget that would have an impact on your personal or household financial situation?

- 1 – Yes
- 2 – No
- 0 - Don't know

BLOCK 6 POST-SPEECH DISCUSSION

LENGTH 30 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?

What stood out to you the most?

PROBE: Why?

What were the main things that you remember hearing in the budget?

What were the best ideas in the speech? **PROBE:** Why?

What were the less positive aspects in the speech? **PROBE:** Why?

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? **PROBE:** Why?

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? **PROBE:** Why?

What did it mean to you?

Were there parts that you didn't understand? **PROBE:** Which parts?

Is it relevant to you personally?

Is there something you expected that would have been mentioned and it wasn't? **PROBE:** Why do you think that issue is important?

Do you feel like with certain topics announced, you feel as though your current living situation will be or in the future any easier or harder? Why is that?

When making financial decisions, is it more important for the federal government to make life more affordable for Canadians or to invest in Canada's global competitiveness?

While you were observing the speech, did you think the Deputy Prime Minister and Minister of Finance was addressing politicians and economists, or mostly to Canadians?

Why do you say that?

BLOCK 9	CONCLUSION
LENGTH	5 MINUTES

We have covered a lot of topics today and really appreciate you taking the time and energy to join us 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?

**CONCLUDE AND END THE MEETING.
THANK YOU VERY MUCH FOR YOUR COLLABORATION!**