

# 16th

Annual Report  
on Government of Canada  
Public Opinion Research Activities



From April 1, 2016  
to March 31, 2017



Government  
of Canada

Gouvernement  
du Canada

Canada

# 16th Annual Report on Government of Canada Public Opinion Research Activities

From April 1, 2016, to March 31, 2017

## About the report

The Department of Public Works and Government Services is responsible for publishing an annual report on the contracted public opinion research activities of the Government of Canada.

This 16th annual report provides information on the business volume of contracts issued between April 1, 2016 and March 31, 2017, on behalf of departments listed under Schedules [I](#), [I.1](#) and [II](#) of the Financial Administration Act. Although the names of some departments have changed recently, the departmental titles, which appear in this report match those titles identified in the Financial Administration Act.

Previous annual reports on public opinion research can be viewed and downloaded on the [Government of Canada Publications](#) website.

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# The year at a glance

Public opinion research activities (both custom and syndicated research studies)  
contracted between April 1, 2016 and March 31, 2017



**129**  
public opinion  
research studies



**34**  
departments



**27**  
suppliers



**\$12.5 million**  
in contract value



# Introduction

Public opinion research is one of the ways the Government of Canada reaches out to Canadians and listens to their suggestions, their concerns, and their hopes for the future. Listening and learning is important to both sides. Canadians want to be involved. They want to be heard from, and to be well informed about government plans. Likewise, the government wants to learn through research whether its policies, programs and services meet the needs of the people and align with public interests.

This annual report gives a full account of the government's public opinion research activities during the fiscal year 2016 to 2017. The centrepiece of the report is a list of projects contracted between April 1, 2016 and March 31, 2017. The list includes the sponsoring department, the name of the contracted supplier, the budget and the registration numbers to help locate these [public opinion research reports](#) on the Library and Archives of Canada website. The information collected by these research studies is available to everyone.

There are many issues facing Canadians for which the government uses structured approaches, such as public opinion research, to collect information and form a solid basis for decision-making. Departments rely on this information as a resource to deliver tangible results. Canadians appreciate a government that reaches out to them and values diverse perspectives in serving the public interest. Moreover, there is no more efficient way to assess and measure the development or effectiveness of existing programs and services than by asking those most directly affected, the people of Canada.

Public opinion research has demonstrated its usefulness over a long span of time. In this annual report, we document how the Government of Canada used and benefitted from this kind of research and includes information on the flow of past activities.



# The year in review

The government uses public opinion research to ask Canadians about their thoughts and concerns on matters of importance to them. In the past fiscal year (from April 1, 2016 to March 31, 2017), a total of 129 research studies were contracted by 34 federal departments at a cost of \$12.5 million. This amount includes new syndicated research (proprietary studies sold to subscribing clients), where 6 studies were purchased at a cost of \$417,000.

The growing importance of public opinion research coincides with the government's renewed emphasis on evidence-based decision-making and on the willingness of Canadians to participate by providing feedback. The EKOS Research Associates' 2017 syndicated study, Rethinking Citizen Engagement, tells us that 84% of respondents agreed with the statement, "I would personally feel better about government decision-making if I knew that governments sought informed input from average citizens on a regular basis."

In fiscal year 2016 to 2017 we saw an increase in public opinion research activities. The volume of contracted research activities tends to go up and down in relation to the needs and priorities of government. In this respect, the increase points to the intent of government to involve Canadians and, with their assistance, make improvements to government programs and services that are designed to serve them.

The Government of Canada's research activities very much resemble those of Canadian businesses and other sectors of the economy, which use similar research methods to guide decision-making. The amount contracted by the government on research represents only a small portion of the total amount spent on research in the Canadian economy. Public opinion research contracted by the Government of Canada (\$12.5 million in the fiscal year 2016 to 2017) compares with \$483.8 million in total revenues reported by Canadian marketing research firms in 2015 (the most recent data available).

Source: Marketing Research and Intelligence Association 2015 Financial Activity Survey

At the same time, research costs have been contained. As an example, departments are encouraged to use existing data, where available, and otherwise take advantage of standing offer agreements for public opinion research services. The standing offers facilitate contracting with pre-qualified suppliers and extend the benefit of competitive fixed rates to keep costs down. Also, by sharing single subscriptions to syndicated studies, all departments gained access to the information collected by these studies. This cost-sharing and data-sharing approach helped supply smaller departments with information that they would otherwise not have been able to purchase.

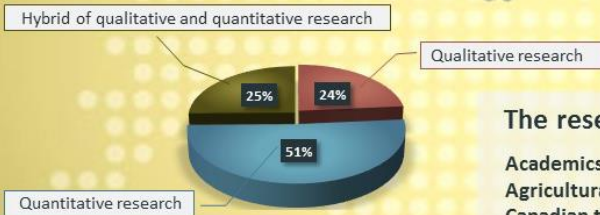
Fiscal year 2016 to 2017 was a year of new planned activities. It was a time to take a fresh look at how the government's public opinion research projects could be made more productive or effective in relation to their cost. A good example of this search for a better way is the Privy Council Office's continuous tracking survey, which collects Canadians' views, in real time, on a variety of subjects relevant to the government. This type of rolling survey, which reaches 500 respondents per week, is a well-established means of learning where Canadians stand on issues. Focus groups that complement the survey, but shed more light on the nature of Canadians' views, are conducted on an ongoing basis. The benefit of this approach is clear when departmental research needs can be accommodated through these studies, such as by adding a question to the survey questionnaire or focus group discussion guide. Collaboration among departments, to increase efficiencies, reduce expenses and share information across government and with Canadians, is a stated goal of the government.

On the following pages you will see the full list of projects contracted in the 2016 to 2017 fiscal year. A quick scan of the list will give you an idea of the range of subject matter that was explored, and the many groups of Canadians we heard from. For a more in-depth look at studies that interest you in particular, go to the [Library and Archives of Canada's](#) website.



## We heard from many Canadians last year

Breakdown of research methods by number of projects



### The research target audience included the general population and...

- |                        |                    |                     |
|------------------------|--------------------|---------------------|
| Academics              | Home owners        | Professionals       |
| Agricultural producers | Indigenous peoples | Seniors             |
| Canadian travellers    | Nurses             | Veterans            |
| Family doctors         | Parents            | Victims of violence |
| Food producers         | Pharmacists        | Youth               |



**37%** of Canadians report having been a victim of a virus, spyware, or malware attack on the device(s) they use to access the Internet for personal use.

Source: [Survey of Internet Users Regarding Cyber Security](#) (registration number: POR 046-16)

**51%** of Canadians incorrectly believe that they will not pay interest on a cash advance as long as the credit card balance is paid in full.

Source: [Public Opinion Research on Financial Consumers' Rights and Responsibilities](#) (registration number: POR 024-16)



**40%** of Canadians believe the government will take care of them if there is a major overland flood. **20%** of Canadians disagree that they can easily find flood insurance for their home.

Source: [Flood Mitigation Public Awareness Campaign](#) (registration number: POR 001-16)

**46%** of Canadians said that they have paid overages for exceeding their Internet data plan in the past year. **21%** of Canadians have experienced bill shock.

Source: [Wireless Code Public Opinion Research](#) (registration number: POR 027-16)



**69%** of Canadians generally feel that biotechnology will improve their way of life, placing it near the top among a selection of innovative technologies. While Canadians remain skeptical about certain applications of biotechnology such as genetically modified animals, newly emerging gene editing technology is seen to have the most potential benefit. Biofuel and plant breeding applications were perceived as the least controversial. According to 2016 research, roughly seven in ten Canadians either strongly (**14%**) or somewhat (**57%**) support research in biotechnology.

Learn more about views on developing technologies and full research findings: [Innovative Agricultural Technologies Public Opinion Research Report](#) (registration number: POR 022-16)



An overwhelming majority (**95%**) of Canadians believe that climate change is taking place.

Source: [Public Opinion Research on Climate Change](#) (registration number: POR 021-16)



# Custom research studies

contracted between April 1, 2016 and March 31, 2017

## In this section

[Examples of research studies conducted during the fiscal year](#)

[List of custom research studies by department](#)

[Business volume of custom research studies by department](#)

[Business volume of custom research studies by supplier](#)

Public opinion research helps the Government of Canada meet the needs and expectations of its citizens. With this type of research, the government can assess how well its messages, policies, programs and services are being understood and used by Canadians.

## Examples of research studies conducted during the fiscal year

### The Canada Post Review with Canadians, Indigenous Peoples and Canadian Businesses



The **Department of Public Works and Government Services** appointed a task force to conduct an independent review of Canada Post services, including home delivery.

As part of the review, 3 separate studies were commissioned: research with the Canadian general public (a sample of 2,246 adults), with Indigenous peoples (401 adults from both on- and off-reserve), and with Canadian businesses (a sample of 1,202 large, medium and small businesses).

Some of the key findings from these research studies include:

- The vast majority of the general public (94%) in urban, rural and remote communities, Indigenous peoples (97%) and 68% of businesses of all sizes believe that mail delivery is highly important. These audiences also strongly feel that Canada will always need postal services that are owned and operated as a government service (88% of Canadians, 92% of Indigenous peoples and 83% of businesses).
- The general public (92%), Indigenous peoples (94%), and businesses (84%), agree that door-to-door delivery should be maintained for populations with particular needs, such as seniors and people with disabilities.

The full research reports can be found on the Library and Archives of Canada's website:

- [Canada Post Review with Canadians](#) (registration number: POR 010-16)
- [Canada Post Review with Indigenous Peoples](#) (registration number: POR 020-16)
- [Canadian Businesses' Views on Canada Post Services](#) (registration number: POR 009-16)

## The Canadian Cannabis Survey



The **Department of Health**, acting on the government's promise to legalize, regulate and restrict access to marijuana, surveyed Canadians' knowledge, perceptions, attitudes and behaviours towards marijuana use.

The Canadian Cannabis Survey examined issues such as the quantity used and the medical use, the cannabis market, and issues related to driving. Results from the Canadian Cannabis Survey will establish a baseline snapshot of patterns of cannabis use, such as:

- the quantities used
- the sources and pricing
- the issues of public safety, such as impaired driving

This baseline survey will help the government to understand the possible impacts associated with the legalization, regulation and restriction of cannabis use.

The Canadian Cannabis Survey was based on interviews with 1,600 cannabis users and 2,000 non-users. A "cannabis user" is someone who has used cannabis in the last 12 months and represents about 11% of the adult population. The survey was based on a combination of telephone and online interviewing.

Source: The Canadian Cannabis Survey (registration number: POR 102-16)

## Public Views on Immigration



In August 2016, the **Department of Citizenship and Immigration** conducted a telephone survey of 1,598 Canadians aged 18 years and over, to hear their views on immigration. Specifically, the survey asked about their perception of the numbers of immigrants coming to Canada, and the impact of immigration on Canada.

The study found that Canadians have generally favourable attitudes toward immigration. Half (52%) of Canadians believe that "about the right number" of immigrants are coming to Canada. Two thirds (67%) of Canadians agree that immigrants contribute to the economy by working or by creating businesses and jobs. Almost three quarters (72%) believe that accepting refugees is part of Canada's humanitarian tradition.

Source: [Public Views on Immigration](#) (registration number: POR 025-16)

## Public Opinion Research on Climate Change



In the fall of 2016, the **Department of the Environment** conducted a study with Canadians on their opinions regarding climate change and the various ways to address it. The purpose of the study was to understand Canadians' views of recent government actions to address climate change and the measures of the [Pan-Canadian Framework on Clean Growth and Climate Change](#), as well as how they assess their own ability to contribute.

The study found that an overwhelming majority (95%) of Canadians believe that climate change is happening. Notably, a plurality (44%) said they feel they could be doing more to stop it.

Additionally, Canadians are responding to climate change in different ways. Over one quarter (28%) have undertaken some kind of home renovation in the past year. This includes installing new windows, replacing the hot water heaters and improving air sealing.

However, the majority of Canadians are not using low carbon transportation options. Specifically, only 35% travel to work or school, and 20% run errands by public transit, foot, or bike. Few (4%) have a fully electric or hybrid vehicle.

The Department of the Environment continues to use these findings to inform its communications initiatives. The findings indicate that less focus is needed on persuading the public that climate change is real, or that it should be a priority for the Government of Canada. As a result, the focus has shifted to increasing public support for and understanding of climate change policies, and to providing everyday Canadians and businesses with the necessary information to make changes in their personal lives and daily operations.

The study comprised 2 online surveys (with samples of 1,511 and 1,001 adults) in 2016.

Source: [Public Opinion Research on Climate Change](#) (registration number: POR 021-16)

## List of custom research studies by department

Below is a list of custom research studies designed for the specific needs of government departments. A registration number is assigned to each study that can then be used to find it in the [public opinion research reports](#) collection.

**Table 1: List of custom public opinion research studies contracted between April 1, 2016 and March 31, 2017**

Research study title by department	Registration number	Supplier	Contract value
<b>Canada Revenue Agency</b>			
2016 Annual Corporate Research	POR 017-16	Environics Research Group Limited	\$164,926.78
2016 to 2017 Canada Revenue Agency Advertising Campaign Testing	POR 076-16	Ekos Research Associates Inc.	\$54,240.00
Correspondence Modernization: Call Driver and Print Media Reduction	POR 112-16	Sage Research Corporation	\$93,032.90
Electronic Authorizations for Business	POR 058-16	Corporate Research Associates Inc.	\$54,810.65
Fairness in Tax Administration	POR 093-16	Quorus Consulting Group Inc.	\$149,673.02
Meeting the Government of Canada's Service Mandate	POR 049-16	Ipsos-Reid Corporation	\$99,917.20
Qualitative Research with Vulnerable Populations	POR 103-16	Corporate Research Associates Inc.	\$105,598.50
Self-employed Taxpayer Attitudes on Payment of Debt and Compliance	POR 082-16	Sage Research Corporation	\$59,999.61
The Experience of Indigenous Communities with Tax Filing	POR 040-16	Phoenix SPI	\$233,672.70
<b>Canadian Food Inspection Agency</b>			
Public Opinion Research with Canadians on Food Safety 2016 to 2017	POR 077-16	The Earnscliffe Strategy Group Inc.	\$67,750.85
Public Opinion Research with Food Businesses to Support Promotion with Food Safety Regulations	POR 066-16	Ekos Research Associates Inc.	\$112,994.35
<b>Canadian Grain Commission</b>			
Client Satisfaction Survey	POR 105-16	Ipsos-Reid Corporation	\$182,207.88
<b>Canadian Radio-television and Telecommunications Commission</b>			
Basic Telecommunications Services Review	POR 030-15	Ekos Research Associates Inc.	\$33,335.00
Cultural Diversity in Canadian Media	POR 063-16	Phoenix SPI	\$54,915.03
Protection within the Communication System	POR 065-16	Environics Research Group Limited	\$10,000.50
Wireless Code Public Opinion Research	POR 027-16	TNS Canada Ltd.	\$59,934.45
You Have Choices: Choosing a Service Provider	POR 034-16	Quorus Consulting Group Inc.	\$38,457.86
<b>Communication Security Establishment</b>			
Attitudes Towards the Communications Security Establishment: Baseline Study	POR 128-16	Ekos Research Associates Inc.	\$83,699.10

<b>Department of Agriculture and Agri-Food</b>			
Agriculture and Agri-Food Canada Strategic Issues Tracking Survey 2016	POR 023-16	Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel	\$154,990.80
Innovative Agricultural Technologies Public Opinion Research	POR 022-16	AC Nielsen Company of Canada	\$144,301.34
Qualitative Research: Strategic Issues Focus Group Study	POR 080-16	Ekos Research Associates Inc.	\$101,397.73
Quantitative Research: Agricultural Awareness Baseline Survey	POR 091-16	Phoenix SPI	\$74,876.99
<b>Department of Canadian Heritage</b>			
2016 Northern Lights Visitor Study	POR 018-16	Quorus Consulting Group Inc.	\$29,806.58
Arts and Heritage Access and Availability Survey 2016 to 2017	POR 051-16	Environics Research Group Limited	\$163,614.45
Assessing the Canada 150 Advertising Campaign: Advertising Campaign Evaluation Tool (ACET)	POR 120-16	Léger Marketing	\$20,888.05
Canada 150: Wave 1 Baseline Survey	POR 003-16	Léger Marketing	\$84,128.50
Creative Concept Testing for the Kick-off: Canada 150 Advertising Campaign	POR 074-16	Ekos Research Associates Inc.	\$18,684.55
Public Opinion Research: Awareness, Impact and Participation in the Celebration and Commemoration Program	POR 098-16	Ekos Research Associates Inc.	\$62,099.15
<b>Department of Citizenship and Immigration</b>			
2016 to 2017 Annual Tracking Study: Qualitative Research	POR 125-16	Ekos Research Associates Inc.	\$188,828.65
2016 to 2017 Qualitative Research about Immigration Issues	POR 114-16	Quorus Consulting Group Inc.	\$160,313.10
International Experience Canada: Brand Testing	POR 099-16	Environics Research Group Limited	\$39,917.25
Public Views on Immigration	POR 025-16	Ekos Research Associates Inc.	\$62,903.15
Qualitative Research on Immigration	POR 013-16	Léger Marketing	\$70,466.80
<b>Department of Employment and Social Development</b>			
2016 to 2017 Old Age Security Service Improvement Strategy (OAS SIS) Prototype: Public Opinion Research	POR 026-16	Sage Research Corporation	\$59,923.90
2016 to 2017 Client Experience Survey	POR 092-16	Ipsos-Reid Corporation	\$237,475.15
2016 to 2017 Employment and Social Development Canada Exploratory Youth Research	POR 117-16	Corporate Research Associates Inc.	\$72,958.45
Employment Insurance Service Quality Review Survey	POR 032-16	Phoenix SPI	\$77,975.65
Social Security Tribunal of Canada Appellant Satisfaction Survey <sup>1</sup>	POR 064-16	Quorus Consulting Group Inc.	\$39,966.97

<sup>1</sup> The contract was issued under the Department of Employment and Social Development on behalf of the Administrative Tribunals Support Services of Canada.

<b>Department of Finance</b>			
Fall 2016: Survey and Focus Groups on the Economy	POR 033-16	Environics Research Group Limited	\$147,276.06
Focus Groups on the Economy (Qualitative) Using Perception Analyzer	POR 115-16	AC Nielsen Company of Canada	\$63,884.55
Qualitative Research on Budget Themes and Key Messages January 2017	POR 090-16	Quorus Consulting Group Inc.	\$59,330.65
Winter 2016: Survey and Focus Groups on the Economy	POR 071-16	Phoenix SPI	\$156,585.66
<b>Department of Fisheries and Oceans</b>			
Public Perceptions of the Canadian Coast Guard	POR 110-16	Environics Research Group Limited	\$17,277.70
<b>Department of Foreign Affairs, Trade and Development</b>			
Public Opinion Research on Canada-United States Relations	POR 087-16	Foreign Policy	\$24,998.00
<b>Department of Health</b>			
Attitudes and Awareness of Zika Virus and Mosquito-Control Measures	POR 109-16	TNS Canada Ltd.	\$67,787.46
Awareness and Confidence in Canada's Pesticide Regulatory System	POR 042-16	Ipsos-Reid Corporation	\$74,981.10
Canadian's Knowledge and Understanding of Alcohol Use in Pregnancy and Fetal Alcohol Spectrum Disorder (FASD)	POR 072-16	TNS Canada Ltd.	\$84,963.82
Chemicals Management and Environmental Health Issues Survey and Focus Groups	POR 050-16	Ekos Research Associates Inc.	\$95,730.78
Consumer Preferences for Front Pack Labelling Strategies	POR 060-16	Sage Research Corporation	\$89,953.65
Evaluating Various Components of Employee Assistance Services (EAS) Client Services: 2017	POR 094-16	Elemental Data Collection Inc.	\$23,882.55
Focus Groups Testing for Air Quality Health Index (AQHI) Supplemental Health Messaging	POR 056-16	Corporate Research Associates Inc.	\$58,324.95
Health Eating Strategy: Dietary Guidance Transformation (Focus Testing of Foundational Statements)	POR 126-16	The Earnscliffe Strategy Group Inc.	\$56,955.90
Health Eating Strategy: Dietary Guidance Transformation (Focus Groups on Use of Canada's Food Guide)	POR 116-16	Corporate Research Associates Inc.	\$148,137.35
Knowledge and Perception of the Canadian Science Centre for Human and Animal Health: 2017	POR 078-16	Prairie Research Associates Inc.	\$24,916.50
Public Perceptions of Climate Change and Health	POR 095-16	Environics Research Group Limited	\$119,928.60
Qualitative and Quantitative Research on E-cigarette Flavours and Risk Perception	POR 088-16	Phoenix SPI	\$149,077.09
Qualitative and Quantitative Research on Standardized Cigarette Design Elements and Cigarette Package	POR 041-16	Environics Research Group Limited	\$245,949.70
Seasonal Influenza Immunization Coverage Survey 2016 to 2017	POR 104-16	Léger Marketing	\$74,664.75

Survey of Health Care Providers' Views and Experience with Vaccine Hesitancy: 2017	POR 118-16	Environics Research Group Limited	\$138,312.00
The Canadian Cannabis Survey	POR 102-16	Advanis Jolicoeur	\$249,820.40
<b>Department of Justice</b>			
National Justice Survey 2016: Canada's Criminal Justice System (CJS)	POR 015-16	Ekos Research Associates Inc.	\$234,070.46
<b>Department of National Defence</b>			
Holistic Professional Formation Research	POR 113-16	The Earncliffe Strategy Group Inc.	\$40,081.10
Public Awareness and Perceptions of the Cadet Program: 2017 Tracking Study	POR 106-16	Ipsos-Reid Corporation	\$113,009.04
Recruitment Advertising Creative Testing: Success Check	POR 127-16	Sage Research Corporation	\$32,826.50
Recruitment Advertising Pre-testing 2016	POR 037-16	Léger Marketing	\$59,754.20
Recruitment of Online Participants for the Survey of Military Employment Image	POR 069-16	Ipsos-Reid Corporation	\$19,995.35
Testing Recall of Recruitment Advertising 2016 to 2017 Campaign	POR 089-16	Corporate Research Associates Inc.	\$23,650.90
The Canadian Armed Forces Occupant Survey	POR 070-16	Environics Research Group Limited	\$108,083.37
<b>Department of Natural Resources</b>			
Advertising Pre-test of the Energy Efficiency Digital: Advertising Campaign	POR 100-16	Léger Marketing	\$27,007.00
ENERGY STAR and EnerGuide Labelling Awareness Survey	POR 035-16	Phoenix SPI	\$83,734.36
Public Confidence in Federal Regulatory Processes and Decision-making	POR 052-16	Ekos Research Associates Inc.	\$78,702.69
Public Opinion Research on Natural Resources Issues	POR 028-16	Ipsos-Reid Corporation	\$176,200.84
Public Opinion Research on Natural Resource Issues: Wave 2	POR 121-16	Environics Research Group Limited	\$151,325.08
Research on Industrial, Commercial and Public Sector Energy Efficiency Awareness, Gaps and Brand Recognition	POR 068-16	Léger Marketing	\$48,274.17
<b>Department of Public Safety and Emergency Preparedness</b>			
Consultation for Review of the Criminal Records Acts	POR 039-16	Ekos Research Associates Inc.	\$9,983.55
Flood Mitigation Public Awareness Campaign	POR 001-16	TNS Canada Ltd.	\$49,813.23
Research on Indigenous Workforce Retention in the Federal Public Service	POR 111-16	Quorus Consulting Group Inc.	\$49,672.31
Survey of Internet Users Regarding Cyber Security	POR 046-16	Ekos Research Associates Inc.	\$77,749.65
<b>Department of Public Works and Government Services</b>			
100 Wellington Project	POR 012-16	Ekos Research Associates Inc.	\$45,462.72
2016 Publishing and Depository Services Client Satisfaction Survey	POR 044-16	Patterson, Langlois Consultants	\$58,588.47

Canada Post Research: Design Phase <sup>2</sup>	POR 002-16	Ekos Research Associates Inc.	\$34,046.90
Canada Post Review: Research with Businesses	POR 009-16	Ekos Research Associates Inc.	\$142,137.05
Canada Post Review: Research with Canadians	POR 010-16	Patterson, Langlois Consultants	\$249,928.72
Canada Post Research with Indigenous Peoples	POR 020-16	Environics Research Group Limited	\$67,206.75
Direct Deposit Initiative	POR 079-16	Ekos Research Associates Inc.	\$131,044.72
Public Opinion Research on Media Consumption Habits of Canadians in Official Language Minority Communities (OLMC)	POR 084-16	Ekos Research Associates Inc.	\$182,875.75
<b>Department of the Environment</b>			
Public Opinion Research on Climate Change	POR 021-16	Environics Research Group Limited	\$61,149.95
<b>Department of Veterans Affairs</b>			
Advertising Post Testing of the 2016 Remembrance Campaign	POR 054-16	Corporate Research Associates Inc.	\$47,109.70
Attitude Towards Remembrance and Veterans Week	POR 057-16	Phoenix SPI	\$39,911.88
Determinants of Successful Transition <sup>3</sup>	POR 053-16	Ekos Research Associates Inc.	\$47,968.50
Surveys of Canadians Armed Forces, RCMP Members and Veterans Using My VAC Account	POR 075-16	Phoenix SPI	\$63,501.48
Veterans Affairs Canada National Survey 2016	POR 043-16	SOM Inc.	\$66,898.26
<b>Economic Development Agency of Canada for the Regions of Quebec</b>			
Healthy Canada Economic Development: Obtaining Health Profile for Canada Economic Development for Quebec Regions	POR 004-16	Capsana Inc.	\$5,650.00
Measurement of Canada Economic Development's Reputation	POR 096-16	Léger Marketing	\$21,605.60
<b>Financial Consumer Agency of Canada</b>			
2016 Public Opinion Research on Consumers' Financial Rights and Responsibilities	POR 048-16	Ipsos-Reid Corporation	\$9,819.70
Financial Consumer Agency of Canada Testing of Credit Card Initial Disclosure Statements and Accompanying Cardholder Agreement	POR 029-16	AC Nielsen Company of Canada	\$77,563.20
Public Opinion Research on Financial Consumers' Rights and Responsibilities	POR 024-16	Ipsos-Reid Corporation	\$76,112.42
<b>Library and Archives of Canada</b>			
Library and Archives of Canada Client Satisfaction Survey	POR 119-16	Phoenix SPI	\$59,720.50
Report on Program Statistics for TD Summer Reading Club 2016	POR 036-16	AC Nielsen Company of Canada	\$37,897.94
<b>National Film Board</b>			
Canadian Awareness and Perception of the National Film Board	POR 107-16	Léger Marketing	\$34,899.99

<sup>2</sup> Unlike a complete research study, this project provided methodological guidance to 3 other studies which are found on the Library and Archives of Canada website: Canada Post Review with [Canadians](#) (registration number: POR 010-16), [Indigenous Peoples](#) (registration number: POR 020-16) and [Canadian Businesses](#) (registration number: POR 009-16).

<sup>3</sup> The contract was issued under the Department of Veterans Affairs on behalf of the Office of the Veterans Ombudsman.



<b>National Research Council of Canada</b>			
Impact Assessment of the National Research Council's Human Health Therapeutics Portfolio	POR 062-16	The Evidence Network	\$24,998.94
<b>Office of the Co-ordinator, Status of Women</b>			
Online Engagement to Inform a Federal Strategy Against Gender-based Violence	POR 016-16	Léger Marketing	\$57,562.20
<b>Office of the Superintendent of Financial Institutions</b>			
Financial Institutions Survey 2016 to 2017	POR 014-16	Enviro-nics Research Group Limited	\$40,068.95
Life Insurance Sector Consultation 2016 to 2017	POR 019-16	AC Nielsen Company of Canada	\$62,545.50
<b>Offices of the Information and Privacy Commissioners of Canada</b>			
2016 Survey of Canadians	POR 038-16	Phoenix SPI	\$58,823.27
Focus Group Discussions with Canadians on Providing Businesses with Consent for the Use of Personal Information	POR 067-16	Phoenix SPI	\$59,824.32
<b>Parks Canada Agency</b>			
2016 to 2017 Parks Canada Awareness Tracking Study	POR 005-16	The Earnscliffe Strategy Group Inc.	\$129,770.56
Advertising Concept Pretesting Parks Canada Agency	POR 055-16	Corporate Research Associates Inc.	\$42,753.55
Pre and Post Evaluations of Parks Canada's 2017 National Tourism Advertising Campaign	POR 059-16	Ekos Research Associates Inc.	\$42,860.90
<b>Privy Council Office</b>			
Awareness of Modernizing Canada's Electoral System	POR 011-16	Nanos Research Corporation	\$8,249.00
Continuous Qualitative Data Collection of Canadians' View	POR 061-16	Ipsos-Reid Corporation	\$916,865.05
Continuous Tracking of Canadians' Views: Quantitative Survey	POR 101-16	Forum Research Inc.	\$312,603.20
Focus Groups: Fall 2016	POR 031-16	Quorus Consulting Group Inc.	\$186,393.50
Focus Groups: Spring 2016	POR 007-16	Corporate Research Associates Inc.	\$112,509.54
Government Priorities Quantitative Survey: Fall 2016	POR 030-16	Ipsos-Reid Corporation	\$214,669.49
Government Priorities Quantitative Survey: Spring 2016	POR 006-16	Elemental Data Collection Inc.	\$122,859.25
Government Priorities Quantitative Survey: Winter 2017	POR 081-16	Ekos Research Associates Inc.	\$199,800.95
VoxPop: Digital Consultation	POR 047-16	Vox Pop Labs Inc.	\$369,058.00
<b>Royal Canadian Mounted Police</b>			
Public Perception of Police Officer Dress and Department Study	POR 122-16	Qualtrics	\$19,180.80
Royal Canadian Mounted Police: Advertising Evaluation and the Police Officer Recruitment Campaign (Winter 2017)	POR 073-16	Ipsos-Reid Corporation	\$83,311.51
Survey of Canadians' and Client Views of Royal Canadian Mounted Police Services	POR 045-16	Enviro-nics Research Group Limited	\$90,313.56

Statistics Canada			
2016 Census of Population Advertising Campaign Post-testing	POR 008-16	TNS Canada Ltd.	\$22,955.95
Treasury Board Secretariat			
Public Service Employee Annual Survey	POR 085-16	Ekos Research Associates Inc.	\$249,843.00

## Business volume of custom research studies by department

A total of 33 departments contracted out custom public opinion research studies between April 1, 2016 and March 31, 2017.

**Table 2: Business volume of custom research by department between April 1, 2016 and March 31, 2017**

Department	Number of research studies	Contract value
Canada Revenue Agency	9	\$1,015,871.36
Canadian Food Inspection Agency	2	\$180,745.20
Canadian Grain Commission	1	\$182,207.88
Canadian Radio-television and Telecommunications Commission	5	\$196,642.84
Communications Security Establishment	1	\$83,699.10
Department of Agriculture and Agri-Food	4	\$475,566.86
Department of Canadian Heritage	6	\$379,221.28
Department of Citizenship and Immigration	5	\$522,428.95
Department of Employment and Social Development	5	\$488,300.12
Department of Finance	4	\$427,076.92
Department of Fisheries and Oceans	1	\$17,277.70
Department of Foreign Affairs, Trade and Development	1	\$24,998.00
Department of Health	16	\$1,703,386.60
Department of Justice	1	\$234,070.46
Department of National Defence	7	\$397,400.46
Department of Natural Resources	6	\$565,244.14
Department of Public Safety and Emergency Preparedness	4	\$187,218.74
Department of Public Works and Government Services	8	\$911,291.08
Department of the Environment	1	\$61,149.95
Department of Veterans Affairs	5	\$265,389.82
Economic Development Agency of Canada for the Regions of Quebec	2	\$27,255.60
Financial Consumer Agency of Canada	3	\$163,495.32
Library and Archives of Canada	2	\$97,618.44
National Film Board	1	\$34,899.99
National Research Council of Canada	1	\$24,998.94
Office of the Co-ordinator, Status of Women	1	\$57,562.20
Office of the Superintendent of Financial Institutions	2	\$102,614.45
Offices of the Information and Privacy Commissioners of Canada	2	\$118,647.59
Parks Canada Agency	3	\$215,385.01
Privy Council Office	9	\$2,443,007.98
Royal Canadian Mounted Police	3	\$192,805.87
Statistics Canada	1	\$22,955.95
Treasury Board Secretariat	1	\$249,843.00
<b>Total</b>	<b>123</b>	<b>\$12,070,277.80</b>

## Business volume of custom research studies by supplier

In total, the government awarded contracts for public opinion research services to 24 research firms in 2016 to 2017. Suppliers delivered various research services, ranging from solely data collection to full qualitative and/or quantitative research services (research design, data collection, analysis and reporting).

**Table 3: Business volume of custom research by supplier between April 1, 2016 and March 31, 2017**

Supplier	Number of research studies	Contract value
AC Nielsen Company of Canada	5	\$386,192.53
Advanis Jolicoeur	1	\$249,820.40
Capsana Inc.	1	\$5,650.00
Corporate Research Associates Inc.	9	\$665,853.59
Ekos Research Associates Inc.	23	\$2,290,459.30
Elemental Data Collection Inc.	2	\$146,741.80
Environics Research Group Limited	15	\$1,565,350.70
Forum Research Inc.	1	\$312,603.20
Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel	1	\$154,990.80
Ipsos-Reid Corporation	12	\$2,204,564.73
Léger Marketing	10	\$499,251.26
Nanos Research Corporation	1	\$8,249.00
Patterson, Langlois Consultants	2	\$308,517.19
Phoenix SPI	12	\$1,112,618.93
Prairie Research Associates Inc.	1	\$24,916.50
Qualtrics	1	\$19,180.80
Quorus Consulting Group Inc.	8	\$713,613.99
Sage Research Corporation	5	\$335,736.56
SOM Inc.	1	\$66,898.26
The Earncliffe Strategy Group Inc.	4	\$294,558.41
The Evidence Network Inc.	1	\$24,998.94
Foreign Policy	1	\$24,998.00
TNS Canada Ltd.	5	\$285,454.91
Vox Pop Labs Inc.	1	\$369,058.00
<b>Total</b>	<b>123</b>	<b>\$12,070,277.80</b>

# Syndicated research studies

contracted between April 1, 2016 and March 31, 2017

This past fiscal year, as part of a pilot project, government-wide subscriptions to 6 syndicated public opinion research studies were purchased.

Syndicated studies are “off the shelf” research reports that provide subscribing organizations with insights on a range of societal and government-specific topics. A major benefit of syndicated studies is their cost-efficiency. They are often more affordable than custom research studies because costs, and research results, are shared among subscribers.

The pilot project allowed federal departments to access the collected information through a single subscription, while ensuring respect for intellectual property rights.

The syndicated studies purchased are listed below.

**Table 4: Business volume of syndicated research studies between April 1, 2016 and March 31, 2017**

Syndicated research study title	Supplier	Contract value
Citizens First	Institute for Citizen-Centred Service	\$50,850.00
GlobeScan Radar 2016	GlobeScan Incorporated	\$45,200.00
Indigenous Insights	The Earncliffe Strategy Group Inc.	\$197,750.00
Insights on Energy and Environment	The Earncliffe Strategy Group Inc.	\$28,250.00
Rethinking Citizen Engagement	Ekos Research Associates Inc.	\$47,460.00
Rethinking Science and Society	Ekos Research Associates Inc.	\$47,460.00
<b>Total</b>		<b>\$416,970.00</b>

# Trends

## in business volume

**Table 5: Trends in contract values and number of research studies**

Period	Number of research studies	Contract value (millions)
April 1, 2016, to March 31, 2017	129	\$12.5
April 1, 2015, to March 31, 2016	51	\$3.8
April 1, 2014, to March 31, 2015	54	\$4.1
April 1, 2013, to March 31, 2014	81	\$4.9
April 1, 2012, to March 31, 2013	72	\$4.3
April 1, 2011, to March 31, 2012	100	\$6.5
April 1, 2010, to March 31, 2011	136	\$7.9
April 1, 2009, to March 31, 2010	148	\$8.3
April 1, 2008, to March 31, 2009	131	\$8.1
April 1, 2007, to March 31, 2008	446	\$24.8
April 1, 2006, to March 31, 2007	562	\$31.4

**Table 6: Yearly average of contract values and number of research studies**

Period	Yearly average number of research studies	Yearly average contract value (millions)
<b>In the last 5 years</b> (April 1, 2012, to March 31, 2017)	77	\$5.9
<b>In the last 10 years</b> (April 1, 2007, to March 31, 2017)	135	\$8.5
<b>In the last 15 years</b> (April 1, 2002, to March 31, 2017)	281	\$14.8
<b>In the last 20 years</b> (April 1, 1997, to March 31, 2017)	341	\$15.8

# Appendices

## In this section

[Appendix I: Managing public opinion research activities in the Government of Canada](#)

[Appendix II: Standing offers for public opinion research services](#)

[Appendix III: Public opinion research-related laws, regulations and policies](#)

## Appendix I: Managing public opinion research activities in the Government of Canada



### Departments

are responsible for the management, research content and overall quality of the research produced

### Treasury Board Secretariat

sets policies and oversees compliance

### Privy Council Office

performs a central role in the leadership and strategic direction

### Department of Public Works and Government Services

provides research advice and is the contracting authority

### Library and Archives of Canada

makes public opinion research reports available to Canadians

### Suppliers

conduct the public opinion research studies and provide reports on the research findings

## Appendix II: Standing offers for public opinion research services

Standing offers are an efficient way of creating an inventory of pre-qualified suppliers with which federal departments can quickly and easily obtain a contract to get their research projects up and running.

In 2015, the Department of Public Works and Government Services completed a multi-phased process involving consultation, request for offers, and bid evaluations, which concluded with the issuing of standing offers for 5 types of public opinion research services:

- [fieldwork and data tabulation for online surveys \(series A\)](#)
- [fieldwork and data tabulation for telephone surveys \(series B\)](#)
- [qualitative research \(series C\)](#)
- [quantitative research \(series D\)](#)
- [qualitative and quantitative research \(series E\)](#)

These standing offers are the result of an open and transparent competitive process designed to:

- encourage the participation of all types of public opinion research suppliers, including small, medium and large businesses, and joint ventures from various geographic locations
- ensure that the government has access to a broad range of subject matter expertise and research specializations with various target groups in Canada
- react to a rapidly changing technological environment, allowing for the use of a variety of research methodologies
- include custom qualitative research, quantitative research and a blend of both research approaches

These standing offers for public opinion research services are in effect until September 30, 2018, with the possibility of one-year extension periods up until the year 2021.

## Fieldwork and data tabulation for online surveys (series A)



This standing offer for online surveys may be used for the following services: programming, pretesting, collecting data, tabulating data and providing pretest and end results.

Standing offer holders for series A:

- [AC Nielsen Company of Canada](#)
- [Advanis Jolicoeur](#)
- [Corporate Research Associates Inc.](#)
- [Ekos Research Associates Inc.](#)
- [IE Market Research Corp.](#)
- [Ipsos-Reid Corporation](#)
- [Léger Marketing](#)
- [The Logit Group Incorporated](#)
- [TNS Canada Ltd.](#)

## Fieldwork and data tabulation for telephone surveys (series B)



This standing offer for telephone surveys may be used for the following services: programming, pretesting, interviewing, tabulating data and providing pretest and end results.

Standing offer holders for series B:

- [AC Nielsen Company of Canada](#)
- [Advanis Jolicoeur](#)
- [Corporate Research Associates Inc.](#)
- [Ekos Research Associates Inc.](#)
- [Elemental Data Collection Inc.](#)
- [Ipsos-Reid Corporation](#)
- [Léger Marketing](#)
- [NRG Research Group](#)
- [TNS Canada Ltd.](#)

## Qualitative research (series C)



This standing offer for qualitative research may be used for the following services: developing the research design, data collection, analyzing, presenting and reporting the results.

Qualitative methodologies such as dyads, triads or one-on-one interviews, focus groups and bulletin board groups may be used to meet the research objectives of specific projects.

Standing offer holders for series C:

- [AC Nielsen Company of Canada](#)
- [Corporate Research Associates Inc.](#)
- [Ekos Research Associates Inc.](#)
- [Léger Marketing](#)
- [NRG Research Group](#)
- [Phoenix SPI](#)
- [Pollara](#)
- [Quorus Consulting Group Inc.](#)
- [Sage Research Corporation](#)
- [The Earncliffe Strategy Group Inc.](#)



## Quantitative research (series D)



This standing offer for quantitative research may be used for the following services: developing the research design, data collection, analyzing, presenting and reporting the results.

Quantitative methodologies such as telephone or online surveys or any other methods, such as mail and in-person surveys, may be used to meet the research objectives of specific projects.

Standing offer holders for series D:

- [Ekos Research Associates Inc.](#)
- [Environics Research Group Limited](#)
- [Forum Research Inc.](#)
- [Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel](#)
- [Léger Marketing](#)
- [Patterson, Langlois Consultants ad hoc recherche inc., Amanda Parriag, Sylvain Laroche, consultant inc., in joint venture](#)
- [Phoenix SPI](#)
- [Quorus Consulting Group Inc.](#)
- [The Earncliffe Strategy Group Inc.](#)
- [TNS Canada Ltd.](#)

## Qualitative and quantitative research (series E)



This standing offer for a combination of qualitative and quantitative methods may be used for the following services: developing the research design, data collection, analyzing, presenting and reporting the results.

Both qualitative and quantitative methodologies may be used to meet the research objectives of specific projects.

Standing offer holders for series E:

- [AC Nielsen Company of Canada](#)
- [Ekos Research Associates Inc.](#)
- [Environics Research Group Limited](#)
- [Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel](#)
- [Ipsos-Reid Corporation](#)
- [Léger Marketing](#)
- [Patterson, Langlois Consultants ad hoc recherche inc., Amanda Parriag, Sylvain Laroche, consultant inc., in joint venture](#)
- [Phoenix SPI](#)
- [Quorus Consulting Group Inc.](#)
- [The Earncliffe Strategy Group Inc.](#)

## Appendix III: Public opinion research-related laws, regulations and policies

### Laws and regulations

- [Financial Administration Act](#) prohibits verbal-only public opinion research reporting
- [Library and Archives of Canada Act](#) requires departments to provide written reports to Library and Archives of Canada within 6 months of completion of data collection
- [Public Opinion Research Contract Regulations](#) standardizes the form and content of contracted public opinion research reports

### Policies

- [Common Services Policy](#) identifies the Department of Public Works and Government Services as a mandatory common service organization for the coordination and contracting of public opinion research
- [Contracting Policy](#) requires departments to notify the Department of Public Works and Government Services when a public opinion research project may require a contract
- [Policy on Communications and Federal Identity](#) ensures that views and interests of the public are considered when government policies, programs, services and initiatives are developed

### Directive and mandatory procedures

- [Directive on the Management of Communications](#) supports and facilitates implementation of the Policy on Communications and Federal Identity
- [Appendix C: Mandatory Procedures for Public Opinion Research](#) provides procedural rules for managing and coordinating public opinion research activities

# Contact information

This report provides an overview of Government of Canada's public opinion research activities contracted between April 1, 2016 and March 31, 2017.

For more information on [public opinion research](#) activities, please visit our pages in the Government of Canada website.

If you have any comments or questions, please contact:

**Public Opinion Research Directorate**

Integrated Services Branch

Department of Public Works and Government Services

350 Albert St, 5th Floor

Ottawa ON K1A 0S5

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