



Public Opinion
Research
in the
Government
of Canada



Annual Report 2003–2004

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Message From The Minister



The role of public opinion research is increasingly critical as the Government of Canada balances the needs and desires of citizens with the realities of its fiscal resources. It is a vital resource in developing government policy, programs and communications centred on the expectations of citizens as well as in assessing the value of public spending. It provides the insight for informed and practical national governance.

This 2003–2004 report illustrates how:

- public opinion research is linked to many key Government of Canada decisions affecting all Canadians;
- Government of Canada departments and agencies are achieving greater efficiency by working together to share information and results; and
- operational safeguards are ensuring transparency, value for money and integrity in the purchase of public opinion research.

Underlying these general achievements are specific improvements that will make public opinion research a sound and reliable resource in the development of government policy and programs. They build on the solid foundation that prompted the Auditor General to conclude in 2004 that overall, public opinion research is managed transparently, with roles and responsibilities clearly defined, echoing the assessment made by the Treasury Board Secretariat in 2002.

New arrangements for the purchase of public opinion research are a key example of the changes. These were the result of extensive consultations with representatives of major Canadian market research associations and departments and agencies. There is now a process that not only ensures equal access to government public opinion research contracts for qualified firms across Canada but also provides Canadians with the assurance that they are receiving quality, integrity and value for their research dollars.

We continue to seek additional improvements, guided by the principles of value for money, stewardship, flexibility and transparency. For example, as you will see in this report, we will be making greater use of information technology to improve efficiency and to strengthen our stewardship of public opinion research. In this process, and others, we continue to consult with major Canadian market research associations, government departments and agencies.

In short, I am committed to the ongoing pursuit of excellence in public opinion research for the Government of Canada, just as the Government itself is committed to listening to all Canadians.

A handwritten signature in black ink, appearing to read 'Scott Brison', written in a cursive style.

Scott Brison

Minister of Public Works and Government Services

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Introduction

Public opinion research (POR) offers the Government of Canada a listening post to hear clearly the opinions of Canadians about its programs, policies and services. It informs government about what Canadians think and expect. It guides government efforts to serve Canadians through new services such as service centres, Web sites and electronic messaging. It provides insight into how they receive information and if all of their questions are answered.

Public opinion research provides the means by which the Government of Canada can be in touch with the conditions and requirements that vary from place to place across the nation. It also establishes whether policies and programs are meeting the needs of the population.

Good governance requires the Government of Canada to ensure the highest possible quality of research, to avoid duplication of effort and to create a repository of work already done. This is the mandate for the Public Opinion Research Directorate in Public Works and Government Services Canada (PWGSC): to provide a public opinion research centre of expertise.

The Directorate provides the technical and coordinating authority for Government of Canada public opinion research. It facilitates POR studies by helping departments throughout the process to ensure their research objectives are met in a timely and efficient manner. As well, it offers advice and training so departments can use public opinion research more effectively, improving value for money in this investment. It contributes to the mandate of the newly formed Government Information Services Branch by helping departments communicate more effectively with Canadians.

The 2003–2004 annual report recounts the work of the Directorate as well as the research that it coordinated. It includes highlights of research undertaken by those departments that rely most heavily on public opinion research. The report starts with an overview of the findings of the Auditor General's review of public opinion research.

The Auditor General's Review of Public Opinion Research

In 2003, the Auditor General examined the administration of public opinion research, reviewing activities from 1999 to 2003. The audit focussed on whether the Government had adequate controls over its public opinion research activities, whether it obtained best value for money and whether the contracting process was transparent.

The Auditor General stated that public opinion research was “well managed” in a transparent manner with adequate controls. “The activities were centrally co-ordinated, as required by policies. Roles and responsibilities in the majority of activities were sufficiently clear.” The report noted that an orientation guide on procedures and a research guide were produced to aid departments with their public opinion research.

The audit also suggested possible improvements such as in cases where greater economy could be achieved by the bulk purchase of syndicated research reports. It also highlighted instances where departmental research reports were not forwarded, or not forwarded on time, to the Public Opinion Research Directorate for depositing with the National Library and the Library of Parliament.

As part of its commitment to continual improvement, the Public Opinion Research Directorate has been implementing an action plan to address the specific issues identified by the Auditor General. This work continues in the current fiscal year. Among the highlights:

- New standing offers and supply arrangements, which are the result of extensive consultations with the research industry and government departments, were implemented in May 2004.
- A new procurement strategy for the bulk purchase of syndicated research is being developed with colleagues in the Communication Procurement Division of PWGSC.
- Compliance by departments in filing reports for depositing in the public domain climbed to 97 percent for the period of the audit. This was to be further enhanced with electronic reminders from a new database. Written reports on research will now also be required from all departments.
- Additional improvements to the management of public opinion research will provide efficiencies across the Government, improve information and knowledge management, and strengthen compliance with Government policies and procedures. This will be achieved through the introduction in 2004–2005 of an electronic project management platform and database that will be made accessible to all departments.

The Public Opinion Research Directorate At Work

The value of public opinion research has become increasingly apparent across government organizations as a means to help:

- inform the development of programs and services, and communications products;
- assess policy initiatives and plans;
- design delivery methods for government programs and services;
- measure the demands and expectations of the Canadian population and other stakeholders, such as businesses; and
- evaluate programs and services to ensure value for public money spent.

Its importance is reflected in the Government of Canada Communications Policy, which specifically encourages the Government of Canada to undertake public opinion research in the development of programs, policies and services. The mandate to coordinate and manage this business is vested in the Public Opinion Research Directorate of Public Works and Government Services Canada. The Communication Procurement Directorate of PWGSC is the sole contracting authority for research on behalf of the Government of Canada.

Federal institutions are required, as part of the Communications Policy, to inform the Directorate of all public opinion research projects before entering into any

contractual arrangement. The Directorate assists departments and agencies with expert advice, facilitating procurement of services, sharing best practices and research results as well as coordinating work across departments.

The Advisory Services offer research expertise to help government organizations develop relevant and reliable research to make informed decisions. Advisors become partners with the organizations with whom they are working, acquiring in-depth and project-specific knowledge. The assistance they offer on research design, legal and policy issues, industry standards, procurement methods and how to achieve maximum value for money for each project is uniquely tailored to each assignment.

Knowledge Transfer fosters partnerships and the sharing of research across the Government of Canada. The unit also produces a variety of research guides, and organizes seminars and information exchange meetings. It ensures that research reports are available to the public through the National Library of Canada and the Library of Parliament. It also manages an Extranet networking site on research and produces the annual report on research coordinated on behalf of the Government of Canada.

Contracting procedures vary from project to project, depending on the scope, dollar value and other factors. These procedures, developed by PWGSC, are designed to ensure that the desired results are achieved and all potential contractors are treated equitably in the procurement process.

In 2003–2004, the Directorate coordinated 593 POR projects with a value of more than \$25.4 million. In the previous year, 576 projects were handled with a value of \$23.7 million.

Public Opinion Research Resources and Tools

The Public Opinion Research Directorate is recognized as the Government of Canada's repository of best practices and techniques in listening to Canadians. In fulfilling that role, the Directorate has assisted in the renewal of the standing offer process, which will strengthen the management of public opinion research and lend transparency to all transactions. As well, it has created several new resources in the past year to help public service practitioners in designing and conducting their public opinion research. A brief description of these tools and resources follows.

POR Project Management Database

A POR on-line database was implemented in 2003 to respond to concerns raised by the Auditor General and to strengthen accountability, improve transparency and promote information sharing. The database was widely tested, beginning with participation in the 2003 GovNet exhibition "Transcending Technology." Once fully operational, this database will offer a streamlined Web-based system to simplify project management, accelerate the dissemination of research results, facilitate partnering and reduce duplication. The database will be accessible to all departments to serve as their own project management system for their POR projects and as a tool to promote greater coordination on horizontal issues, which adds value to each undertaking.

The database was developed to provide on-line access to details of research projects that are planned, under way and completed, along with results. Departmental research coordinators will be able to submit research details for new research projects as well as track progress of projects.

Several departments are participating in a pilot project to use the database and an independent usability study was conducted in March 2004. Full-scale utilization is expected in 2004–2005.

Tendering Process

The Directorate has worked with departments and the Communications Procurement Directorate of PWGSC to develop tools, such as standing offers and supply arrangements that facilitate the timely and efficient procurement of research projects. The recent renewal of the Government's policies on public opinion research services began with consultations between four industry associations — l'Association de l'industrie de la recherche marketing et sociale, the Canadian Association of Marketing Research Organizations, the Professional Marketing Research Society and the Canadian Survey Research Council — and representatives of government departments. They unanimously favoured a new approach, and an industry–government working group collaborated in laying the foundation for a new policy. In May 2004, new standing offers and supply arrangements were put in place. (See Appendix Four.)

Key elements in the new tools ensure value for money by creating a larger pool of suppliers across Canada and more transparency in the selection process. They sharpen competition between firms while giving each one more opportunities to compete for government business.

Advertising Evaluation

The Public Opinion Research Directorate and the Privy Council Office co-chair an interdepartmental committee of public opinion research coordinators involved in evaluating major Government of Canada advertising campaigns. The principal vehicle used to assess advertising campaign effectiveness is the newly developed and tested Advertising Campaign Evaluation Tool (ACET), which is a series of standard questions to be added to departmental evaluations of Government of Canada advertising campaigns.

Its use is required on all major advertising campaigns with a media buy of more than \$400,000, but departments are encouraged to use it on smaller campaigns as well. In addition to measuring effectiveness, the use of ACET will help departments save money in the design of questionnaires and enhance research consistency through the use of standard questions.

Research Techniques: Guideposts to Value

This publication provides Government of Canada employees with an overview of public opinion research. It reviews the advantages and disadvantages of current data collection methods including conventional research methods and emerging techniques using the Internet.

Among its strengths is the step-by-step guide it provides to take the user through the process, beginning with the question of which methodology best serves the objectives of the project. It helps the user decide whether qualitative or quantitative data, or a combination of the two, would be the most useful. There are examples and comparative tables.

It defines public opinion research and includes an outline of procedures to be followed in acquiring research, a check list of key elements in the research process and a glossary of key research terms.

More than 1,300 copies of *Guideposts to Value* were distributed within two months of its release at the 2003 Communicators Conference. It was also distributed to departmental clients, heads of Communications and some departmental regional offices. It continues to be a popular “primer” for those undertaking research across the Government of Canada.

Research Techniques: Guideposts to Value is available from the Public Opinion Research Directorate. Electronically, it is on the Internet site www.pwgsc.gc.ca and at the CommNET Extranet site <http://commnet.gc.ca>.

Public Opinion Research in the Government of Canada: Annual Report 2002–2003

The 2002–2003 annual report was distributed to Cabinet Ministers, senior departmental officials and departmental POR coordinators in November 2003 and posted on the Internet. As well as highlighting the overall public opinion research activities managed by the Public Opinion Research Directorate, the report included summaries of work done in departments that had made the largest investments in POR. The information from the most active departments provided insight into the importance and scope of public opinion research within these organizations. This feature is continued in the 2003–2004 annual report, offering practical examples of the value and versatile capabilities of POR to all managers in the public service.

Successful Communication: Literacy and You

This tool kit helps government communicators to communicate in a way that is easy to understand and effective for all users and recipients. It offers an overview of key techniques for successful communications, practical examples and case studies for communication using all media, as well as evaluation tools. Unveiled at the Government of Canada’s Communicators Conference in May 2003, it became the basis for a workshop co-sponsored with Health Canada that featured the practical applications of the tool kit to cigarette package messages.

POR on CommNET

CommNET, the resource site for Government of Canada communicators, includes a prominent section on public opinion research. There is a list of POR advisors and the departments and agencies each one serves, along with a bilingual list of close to 3,000 Government of Canada public opinion research reports produced since 1994. These are on deposit in the National Library of Canada and the Library of Parliament.

The public opinion research section of CommNET has become a valuable tool for researchers. They have access, for example, to the annual report of public opinion research for the Government of Canada that provides a corporate snapshot of the research work being done by leading departments and agencies.

The site also contains helpful information for those new to public opinion research. Users will find an outline of the public opinion summary that must be completed when a public opinion research project is started. It accompanies a section that discusses the advantages and challenges of on-line public opinion research.

All of the Public Opinion Research Directorate's publications are available on the site. The site has had over 5,400 visits in the last two years.

Seminars and Info-Sessions

An expanding program of seminars and information sessions held in a variety of fora and the increasing number of participants reflect the growing reliance on public opinion research in government and the interest in it among academia.

Public Opinion Research: Thinking Outside the Box, an overview of POR in the Government of Canada and an explanation of the tools available to departments, drew more than 200 people during two sessions at the annual Communicators Conference.

From Pop-Ups to Panels: Conducting Effective On-Line Surveys was repeated in the year and once again attracted more than 100 participants.

The Public Opinion Research Directorate has developed a 90-minute session on POR, which is included in the course material for new executives in the public service. Initial reactions from participants were extremely positive and Directorate resources are distributed at the course for new executives, which is held six times a year.

Community of Practice

The Directorate continued to coordinate and participate in bi-monthly meetings of the informal interdepartmental working group on public opinion research. This expanding group now has representatives from nearly 30 departments and agencies that meet regularly to discuss issues of mutual concern, such as procurement, emerging research techniques, interdepartmental initiatives and partnering on research. Of particular note this year was the demonstration of new Internet sites being developed in several departments to share detailed research results.

As well, the Directorate provided strategic advice and research expertise as a member of the newly formed interdepartmental research committee that coordinates all POR related to Government On-Line. It assisted in developing a best practices guide and participated in workshops to present the advantages and disadvantages of on-line survey research.

Issues And Activities For 2004–2005

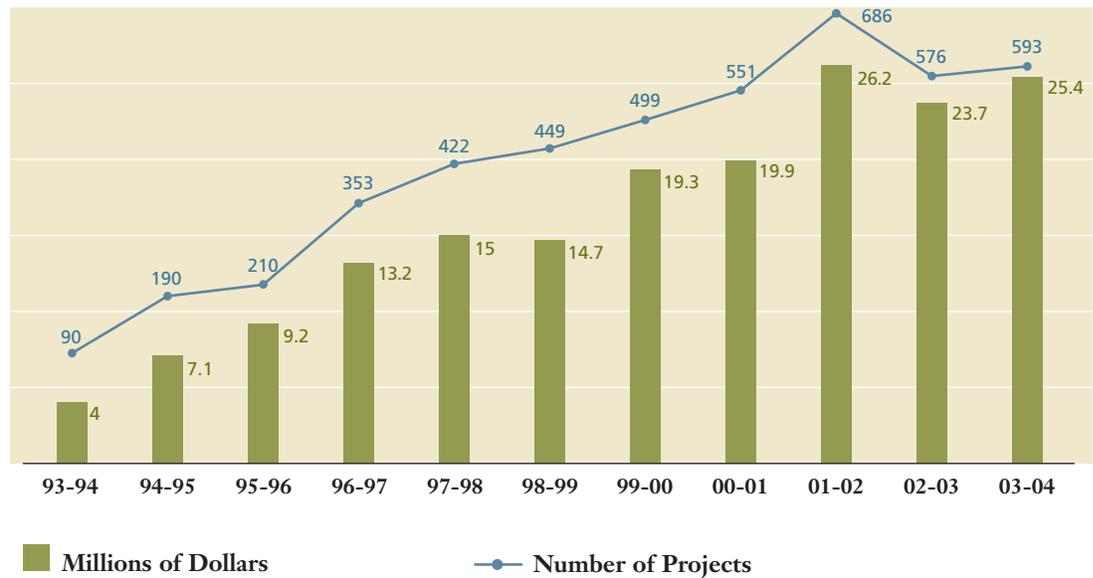
In carrying out its mandate, the Public Opinion Research Directorate will continue to address significant issues such as:

- working with departments and agencies to standardize POR management across government and to encourage general use of the best practices available;
- helping departments and agencies enhance the quality of the research they undertake;
- ensuring that the knowledge gained through the research investment is shared broadly; and
- offering more training on emerging research techniques.

The Government of Canada spends approximately \$3 million a year on syndicated studies but the use of the studies is restricted to the specific subscribers. The Directorate has begun a needs assessment to identify an appropriate, more cost-effective approach to meet the need for syndicated research across departments and agencies.

Overview of Public Opinion Research in 2003–2004 in the Government of Canada

Annual Total Investment in Public Opinion Research



The importance of public opinion research in government operations is reflected by the investments made by the Government of Canada, its departments and agencies.

The dollar value of POR contracted for in 2003–2004 was \$25.4 million, up from \$23.7 million in the previous year and the fifth consecutive year that it approached or exceeded \$20 million.

The 2003–2004 activity of 593 projects was slightly greater than the previous year when 576 projects were undertaken. Health Canada and Human Resources Development Canada (now Human Resources and Skills Development Canada and Social Development Canada) accounted for 168 of the projects, slightly more than a third of the total.

Overall Business Volume – Advisory Services

Nature of Requests for 2003–2004



Public Works and Government Services Canada is the coordinating authority for all public opinion research. Departments and agencies submit their project summaries, and POR advisors determine whether the project falls within the definition of POR.* If it does, the project is registered and advisors offer guidance throughout the entire research project. If it doesn't, departments undertake their projects independently.

In 2003–2004, 593 projects fell within the definition, and there were 72 amendments ranging from delivery dates to the scope of the project. There were 87 other requests, including 70 projects identified as non-POR and 17, which could be on hold, cancelled or awaiting more information. This category also included requests for standing offers.

** The major activities that fit the Treasury Board Secretariat definition of public opinion research relate to public opinion research for policy, marketing and communication undertakings, quality of service studies, syndicated and omnibus surveys and program evaluation. Activities not considered public opinion research include literature reviews or reviews of secondary sources, and verification of service performance or delivery of goods as set out in a contract.*

Top Departments and Agencies for all Public Opinion Research by Business Volume*

Department/Agency	Thousands of dollars	Number of projects
HEALTH CANADA	4,866	105
HUMAN RESOURCES DEVELOPMENT CANADA*	3,720	63
CANADIAN HERITAGE	1,758	42
COMMUNICATION CANADA*	1,459	22
FOREIGN AFFAIRS AND INTERNATIONAL TRADE CANADA	1,337	23
CANADA CUSTOMS AND REVENUE AGENCY*	1,304	21
INDUSTRY CANADA	1,174	38
AGRICULTURE AND AGRI-FOOD CANADA	962	20
NATURAL RESOURCES CANADA	912	31
ENVIRONMENT CANADA	717	27
TREASURY BOARD OF CANADA SECRETARIAT	615	13

** Duties and names of some departments and agencies included throughout this report changed as part of a reorganization of the Government of Canada.*

Canadians' concern over health issues is reflected in the research work of Health Canada which sought public reactions on the Tobacco Control Strategy and issues, such as the attitudes of youth toward drugs, health threats and healthy living. Attitudes of on-reserve First Nations people on a wide range of health issues were also probed. As a result, Health Canada again led departments in the use of public opinion

research, accounting for 17.7 percent of the total projects and 19 percent of the investment. Human Resources Development Canada ranked second. Five departments and agencies had research budgets in the \$1 million to \$2 million range.

Highlights of the research undertaken by the largest users of public opinion research appear in Section 5 on p. 21.

Investment in Public Opinion Research from 2001 to 2004

(Thousands of Dollars)

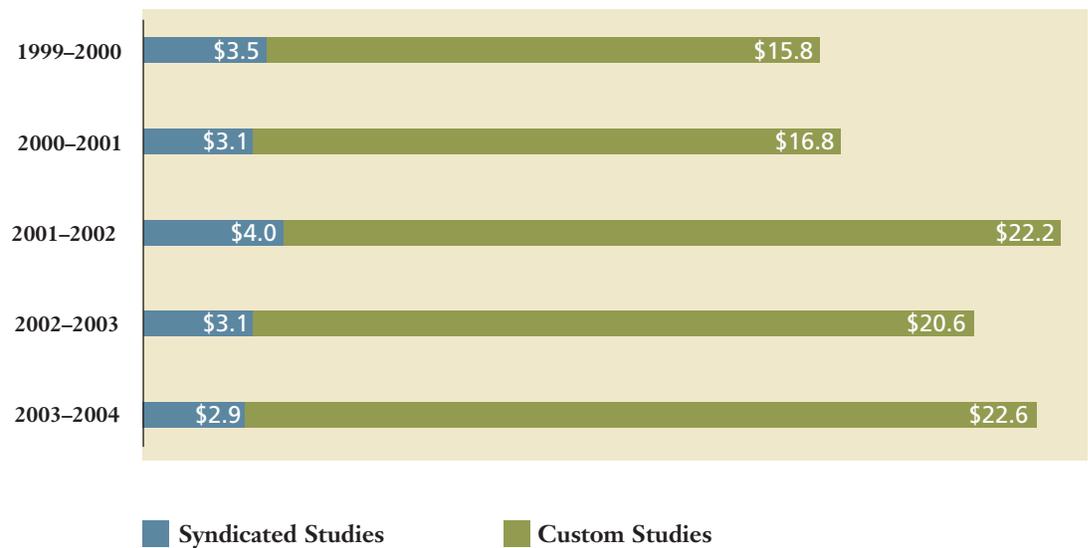
Department/Agency	2001–2002		2002–2003		2003–2004	
	Value \$	No. of Projects	Value \$	No. of Projects	Value \$	No. of Projects
HEALTH CANADA	4,036	88	4,270	81	4,866	105
HUMAN RESOURCES DEVELOPMENT CANADA	2,614	62	2,120	60	3,720	63
CANADIAN HERITAGE	1,288	36	1,124	30	1,758	42
COMMUNICATION CANADA	2,117	70	3,176	75	1,459	22
FOREIGN AFFAIRS AND INTERNATIONAL TRADE CANADA	867	18	870	16	1,337	23
CANADA CUSTOMS AND REVENUE AGENCY	687	23	868	17	1,304	21
INDUSTRY CANADA	1,834	54	1,584	42	1,174	38
AGRICULTURE AND AGRI-FOOD CANADA	430	9	624	15	962	20
NATURAL RESOURCES CANADA	847	32	1,586	28	912	31
ENVIRONMENT CANADA	1,343	36	710	20	717	27
TREASURY BOARD OF CANADA SECRETARIAT	1,228	16	704	15	615	13

Of the most active departments and agencies in public opinion research, eight undertook more projects in 2003–2004 than they did in the previous year. Canadian Heritage showed the greatest increase in number of projects from 30 to 42, a 40 percent increase that was also reflected in dollar value (56% increase from 2002–2003). Agriculture and Agri-Food Canada moved into the most active category, in part because of mad cow disease concerns.

Treasury Board of Canada Secretariat, Environment Canada and Communication Canada all had fewer projects. Communication Canada, which was disbanded on April 1, 2004, showed the greatest decline, down to 22 projects from 75 in the previous year.

Comparison of Custom and Syndicated Studies

(Millions of Dollars)



Custom public opinion research is work commissioned from a private firm for specific research needs of a department or agency. The commissioning organization ensures the intellectual property of reports and other materials generated by the project, which are made available to the public. Results of custom reports commissioned by the Government of Canada are in the public domain and available to all.

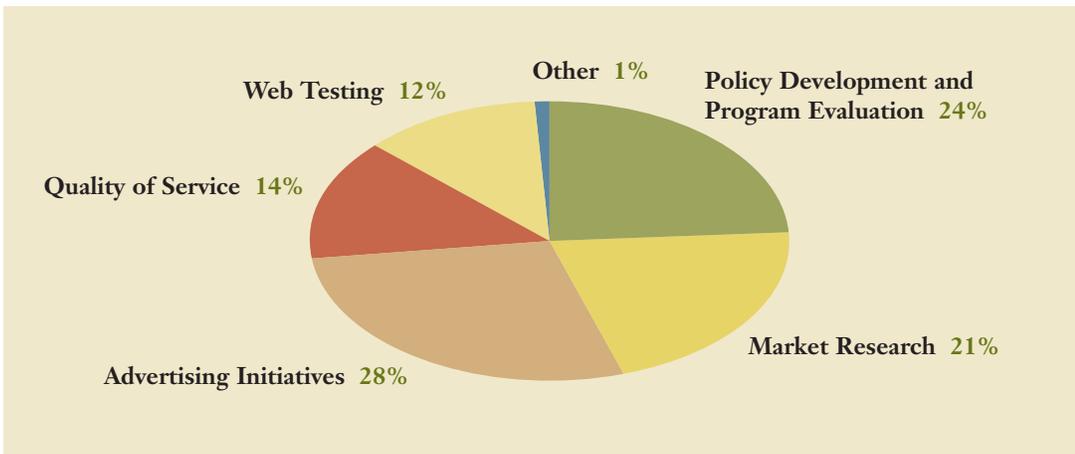
Custom research accounts for most of the work undertaken by the Government of Canada.

Syndicated research is owned by the firm which conducted the research and the data gathered on a wide range of subjects is offered to subscribers. These data often contain trend information. Syndicated research is sometimes efficient, because

the overhead costs are shared by all subscribers, but they are prohibited from distributing the information to any other parties including other government departments. Departments and agencies that invest in additional omnibus questions can share the results of these questions with other departments and agencies.

In 2003-2004, the Government of Canada reduced its investment in syndicated research, purchasing studies worth \$2.9 million compared with \$3.1 million in the previous year and \$4 million in 2001-2002. Custom research, however, is up to \$22.6 million from \$20.6 million, a 10 percent increase.

Type of Research as a Percentage of Total Investment in Custom Research

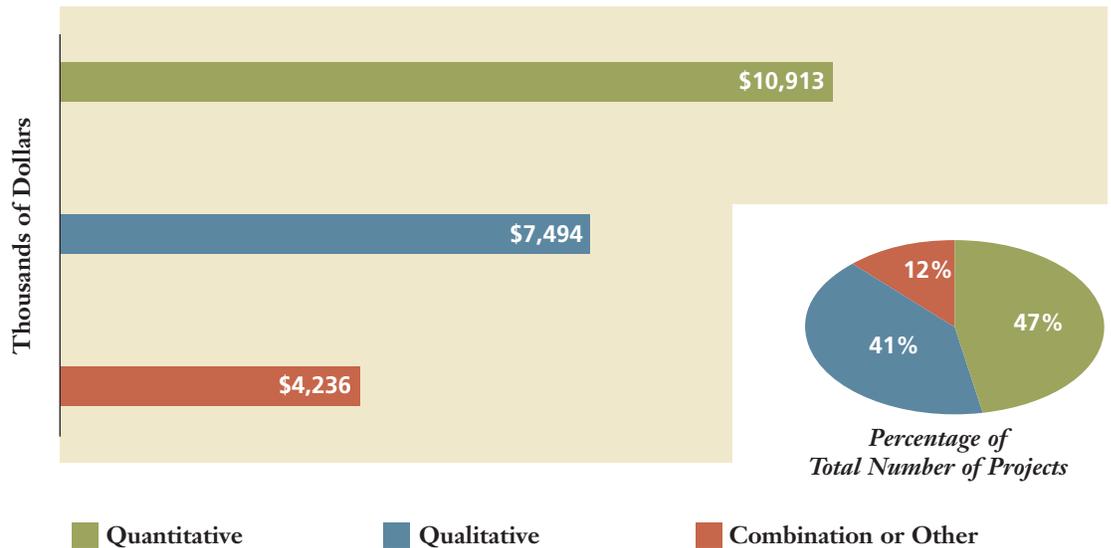


Advertising research, which includes advertising tracking and testing as well as communications product testing continues to absorb an increasing amount of total public opinion research spending. It accounted for 28 percent of all POR investment in 2003–2004, up from 23 percent and 17 percent in the two previous years respectively. Policy development and program evaluation (24 percent) and market research (21 percent) were the other major users.

Quality of service research doubled this year, accounting for 14 percent of the total value of projects compared with seven percent in the previous year. Government departments and agencies also continue to be concerned with the effectiveness of using the Web, which accounted for 12 percent of research expenditures in 2003–2004 compared with 11 percent in the previous year.

Percentage of Projects and Total Investment Based on the Research Methodology for Custom Research

Research Methodologies Used



Quantitative research refers to information obtained about some or all members of a target population through structured procedures, such as a survey, allowing conclusions to be drawn for the total target population. Nearly half of the work undertaken fell into this distinct category.

Qualitative research refers to information obtained from some members of a target population through unstructured or semi-structured procedures, such as groups or interviews. No projections of

results to the target population can be made from this type of research. Forty-one percent of the research was in this category, up from 38 percent in the previous year.

Some research consisted of a quantitative–qualitative combination that, along with “other,” accounted for the remaining 12 percent. “Other” included research projects such as POR design (i.e., questionnaire design) and analysis.

Highlights Of Key Public Opinion Research Projects

Public opinion research is vital to the development of policies, programs and services that directly touch the day-to-day lives of Canadians. For this report, we asked the 10 departments that invested most heavily in public opinion research to provide a brief overview of work conducted in the review period. Their contributions follow.

Health Canada

Health care is Canadians' top priority. In order to address this priority, Health Canada uses public opinion research extensively in support of its mission to maintain and improve the health of Canadians — monitoring trends and exploring values, perceptions, awareness, knowledge and behaviours related to a broad range of health issues.

Highlights of 2003–2004:

- Qualitative and quantitative research was conducted to support the development and implementation of the Tobacco Control Strategy, a \$480 million initiative to reduce tobacco use in Canada.
- Risk perception and attitudes about new and emerging public health threats, such as the West Nile virus, SARS and mad cow disease, were examined.
- Canada's Drug Strategy research focussed specifically on the attitudes of youth toward marijuana, taking into account some of the wider psychosocial factors at play when youth face personal choices about drug use.
- Wide-ranging research explored the attitudes of on-reserve First Nations people toward health issues, including tobacco use, diabetes and injury prevention.
- Several studies explored the topical issues of diet and exercise, examining barriers and motivators both among teens and busy families.

In 2004–2005, health care and reform of the health care system continue as major priorities with research tracking Canadians' opinions about these programs.

The Department will also use public opinion research to support the Healthy Living Strategy, to explore attitudes toward healthy eating, physical activity and chronic disease areas such as cancer and heart health, as well as to monitor risk perceptions around public health threats including pandemic influenza and West Nile Virus.

Human Resources Development Canada *(now Human Resources and Skills Development Canada and Social Development Canada)*

Public opinion research is critical in developing and implementing policies and programs relating to Canada's human resources, providing valuable insights in support of the federal socio-economic strategy with its goal of achieving a high quality of life, inclusive of all Canadians.

For the first time, a comprehensive, national public opinion study on disability issues in Canada was undertaken to gain an understanding of Canadian attitudes toward disability. The Office for Disability Issues commissioned the study, because gaining knowledge about public attitudes toward persons with disabilities and disability issues is crucial to opening more opportunities for the full participation of these persons in all aspects of Canadian life.

The research was conducted in two phases: first, a telephone survey of a representative group of 1,843 Canadians followed by qualitative research exploring in greater detail specific findings and themes uncovered in the first phase of the survey.

Access to post-secondary education (PSE) is a critical component of the Government's skills and learning agenda and Human Resources and Skills Development Canada has a number of initiatives designed to alleviate the financial burden of pursuing post-secondary education. A two-phase study of public views on the system of supporting Canadians' access to post-secondary education was undertaken, covering issues pertaining to the quality, accessibility and funding of the education system. Qualitative research was conducted in several locations across Canada which included areas with barriers to PSE such as Glace Bay, Nova Scotia and Vernon, British Columbia. A follow-up quantitative phase built on the information gathered in the qualitative phase.

Other public opinion research included the annual tracking survey on attitudes toward employment insurance, as well as research to support the Government On-Line and the Modernizing Service for Canadians initiatives. An evaluation was undertaken on two major advertising campaigns, one informing Canadians about government services available for children and their families, and one about the new Compassionate Care Benefits.

Planned research will involve issues relating to modernizing service, services for children and their families, the skills and learning agenda, workplace issues, and employment benefits and support measures. It will also track information on established programs.

Canadian Heritage

Eight projects measuring the level of client satisfaction with the Department's programs and services were conducted during the year, including the Minister's Correspondence Unit and participants in the "March 21" anti-racism video competition campaign. Three of the eight projects used the Common Measurement Tool (CMT) in their assessment. As well, six projects tested the increasingly popular Culture.ca site and its promotional material.

The Arts in Canada: Access and Availability Research Study was a major project. Canadian Heritage has a mandate to ensure that Canadians have access to the arts and to support artistic and cultural organizations to help define the Canadian identity. To fulfil that role, it is vital to understand fully Canadians' opinions, experiences and expectations on arts and culture. The study results will be used to develop a Canadian profile and help ensure that policies and programs are realistic and appropriate.

The study consisted of two parts: a quantitative survey of 2,662 Canadians aged 15 and older, including 772 interviews with Canadians in a linguistic minority environment (Francophones outside Quebec and Anglophones in Quebec), followed by a series of 12 focus groups in communities that are representative of the population's relationship to the arts. In the sampling plan (quantitative and qualitative), particular attention was also given to young people and residents in rural communities.

For 2004–2005, the growing trend of determining clients' satisfaction as it relates to Canadian Heritage programs and services will continue. Research will also be used to paint an accurate picture regarding the use of the Internet in presenting and promoting culture, the arts and Canadian diversity.

Foreign Affairs and International Trade Canada (now Foreign Affairs Canada and International Trade Canada)

The Department of Foreign Affairs and International Trade (DFAIT) used various public opinion research surveys and studies to track attitudes of Canadians to major international activities. Among the research consulted were Environics *Focus Canada Reports*, the DFAIT *Communications Survey*, Communications Canada's *Listening to Canadians*, the EKOS *Public Security Monitor*, EKOS *International Trade Survey* and the PEW *International Survey*.

Highlights of the findings:

- Canadians say their top international concerns are war and the environment, followed by world hunger and terrorism. The public is committed to multilateralism, negotiating new trade agreements, especially in Europe and Asia, creating a safer Canada–United States border and closer cooperation with the United States on security.

- Antipathy toward the present American administration among Canadians over both softwood lumber and beef disputes, together with perceived U.S. unilateralism, is stronger than it was in 2002. (Twenty-seven percent of Canadians say the United States is the most important country for Canada.)
- Support for Canada's contribution to the war against terrorism in Afghanistan remains strong, as does support for peacekeeping. Although only 28 percent say the United Nations is an effective organization, 73 percent of Canadians prefer to work with the UN rather than the United States on the world's problems.
- Although Canadians see the benefit of trade for the Canadian economy, 88 percent of Canadians believe Canada relies too heavily on trade with the United States and want greater diversification.

Canadians give the Government of Canada high approval ratings for its handling of international affairs over the past year on issues such as the Iraq crisis, the Canada–United States relationship as well as for promoting peace and security, and human rights abroad, and assisting Canadian businesses internationally.

Canada Customs and Revenue Agency (*now Canada Revenue Agency*)

A principal focus of Canada Customs and Revenue Agency's (CCRA) public opinion research related to services provided to the public, including its fourth large-scale annual survey of high-level opinion indicators. The Agency also conducted projects that examined reactions to its electronic services including the Agency's telephone and Internet tax return filing methods and the usability of its Web site.

The first CCRA Web Site User Survey, undertaken in 2003, consisted of a random national telephone survey of Web site visitors. It provided demographic and behavioural profiles, measured satisfaction with various aspects of the Web site and explored the relationship between the Agency's telephone and Internet service channels. The core survey, with further questions added regarding the use of multiple service channels, was scheduled to be repeated in 2004.

Industry Canada

Industry Canada's public opinion research during 2003–2004 included custom and syndicated projects touching policy and program development, communications planning and evaluation, Web site testing and client satisfaction.

Key research examined the public environment for business and the general public in relation to the Government of Canada's economic and business agenda. The first annual Industry Canada Study focussed on research and development, commercialization, trade and investment. Industry Canada continued to examine the impact of the Internet on Canadians and to advance Government on Line initiatives through Web site development and evaluations. The Department undertook client satisfaction and service channel studies including research on businesses' preferred communication channels. Substantive research was also conducted on consumer protection and campaign public awareness issues. Industry Canada also participated in a number of horizontal research initiatives involving such topics as biotechnology and North American trade.

Agriculture and Agri-Food Canada

Public Opinion Research (POR) was an important tool in advancing Agriculture and Agri-Food Canada's key priorities in 2003–2004. The Department's POR during the year was done in support of the Agricultural Policy Framework (APF), a major federal provincial initiative aimed at positioning Canada as the world leader in the production of food that is of the highest quality and safety, innovative and produced in an environmentally-responsible manner. The Department undertook a number of public opinion research initiatives to obtain measures on perceptions and attitudes of Canadian producers and the general public in a number of areas central to the success of the APF, namely:

- Branding Canada in the agriculture and agri-food industry;
- Policies, programs and initiatives related to food safety;
- Income stabilization and safety net programs;
- Skills training and use of beneficial management practices for farmers;
- Sources of information, awareness of communications initiatives and evaluation of communication products.

A particularly innovative area of investigation concerned public views on functional foods. Close to 3,000 Canadians, including 800 health professionals were surveyed on their awareness, knowledge, views and use of functional foods and nutraceuticals. The surveys were intended to support market development activities.

Natural Resources Canada

Public opinion research at Natural Resources Canada (NRCan) supported policy and program development (e.g., tracking awareness and understanding of climate change and Kyoto, EnerGuide, Energy Star and ethanol-blended gasoline); communications planning and evaluation (e.g., pre-testing ads for the One-Tonne Challenge, post-testing for major Energy Star print and TV ad campaigns); client satisfaction; and internal communications. The Department continues to expand its use of subscription and syndicated research products to support public environment analysis, and as a cost-effective means of exploring gaps in understanding of opinion on certain issues (e.g., corporate social responsibility) and among certain populations.

Web site development and evaluation accounted for one third of the year's projects. This included research for the on-line version of The Atlas of Canada, the Office of Energy Efficiency (OEE) Web site and the Government of Canada Science and Technology Cluster Site, for which NRCan is the lead department. Research for the latter project included focus groups with a variety of audiences, an on-line survey of federal stakeholders and in-depth usability testing with students. The results of this multi-stage research program are vital to the development of a cluster site that provides effective access for Canadians to high-quality, on-line Science and Technology information and other services of the Government of Canada and its partners.

Environment Canada

Environment Canada designed initiatives to support the business lines of conservation, protection and meteorology, as well as ongoing management and human resource efforts internal to the Department. Research conducted over the course of 2003/04 included several internally managed on-line evaluations of products and services; regional studies exploring water issues in the Great Lakes basin and on-line resources in Quebec; client surveys to support environmental protection programs and meteorology services; and a survey to gauge awareness of an article ranking corporate social and environmental performance and its impact on consumer behaviour.

The Department also continued its research program in support of the One Tonne Challenge (OTC), with a literature review and panel survey to examine social engagement issues among Canadian youth. The results of this study will guide social marketing efforts aimed at youth and provide a baseline to assess the effectiveness of these efforts.

In 2004-2005, the Department expects to continue to explore public attitudes on water, toxins, nature and climate change. Initiatives that may be pursued include surveys to examine Canadians' views on water infrastructure, quantity and management, and approaches to addressing climate change. Other research may explore views relating to the *Canadian Environmental Protection Act* (CEPA), contaminated sites, the *Species at Risk Act* (SARA), the management of natural areas and Canada's role in

the management of the environment internationally. The Meteorological Service of Canada has also committed to annual surveys on satisfaction with precipitation forecasts as part of its Service Improvement Initiative.

Treasury Board of Canada Secretariat

The Chief Information Officer's Branch (CIOB) of the Treasury Board of Canada Secretariat completed its second full year with the Government On-Line Internet Research Panel. This panel has been called "innovative" by Accenture Consultants and is a key part of what they call the Government of Canada's "relentless pursuit" of user feedback. A group of Canadian Internet users are recruited to participate in on-line surveys and on-line focus groups throughout the year. The first on-line survey was answered by 6,727 individuals and the second survey by 4,141. There were also five on-line focus groups.

Some of the topics covered with the Government On-Line Internet Research Panel this past year included:

- functionality, navigation and the common look and feel of Government of Canada Web sites;
- privacy, security, authentication and information sharing in an on-line environment;

- development of the Government of Canada Service Vision for Canadians;
- marketing and communications of Government On-Line information and services; and
- accountability and transparency.

In addition to the panel, the CIOB continued to participate in subscription studies such as EKOS' *Rethinking the Information Highway* and the Institute for Citizen Centered Service's *Taking Care of Business* study.

The CIOB also conducted national focus groups to support the ongoing development of the Government of Canada's Secure Channel. Besides using research to refine the Government of Canada's on-line authentication tool for individuals, it supports the development of an on-line authentication tool for businesses looking to conduct secure on-line transactions with the Government of Canada.

Highlights of Investment in Syndicated Studies

Syndicated Study (Firm)	Departmental Subscriptions	Total Dollars for all Departmental Subscriptions (Thousands of Dollars)
<i>FOCUS CANADA</i> (ENVIRONICS RESEARCH GROUP)	13	305
<i>THE IPSOS TREND REPORT CANADA</i> (IPSOS-REID)	12	124
<i>RETHINKING GOVERNMENT</i> (EKOS RESEARCH ASSOCIATES)	7	216
<i>RETHINKING NORTH AMERICAN INTEGRATION</i> (EKOS RESEARCH ASSOCIATES)	6	134
<i>CORPORATE SOCIAL RESPONSIBILITY MONITOR</i> (ENVIRONICS INTERNATIONAL/GLOBESCAN)	5*	27
<i>RETHINKING THE INFORMATION HIGHWAY</i> (EKOS RESEARCH ASSOCIATES)	4	257
<i>PUBLIC SECURITY MONITOR</i> (EKOS RESEARCH ASSOCIATES)	4	129
<i>PERSPECTIVES CANADA</i> (PERSPECTIVES CANADA)	4*	111
<i>INTERNATIONAL ENVIRONMENTAL MONITOR</i> (ENVIRONICS INTERNATIONAL/GLOBESCAN)	4*	41
<i>3SC</i> (CROP)	3	155
<i>DUAL DIGITAL DIVIDE</i> (EKOS RESEARCH ASSOCIATES)	3*	48

Government departments and agencies make regular use of syndicated studies to track changes in opinions and attitudes. This table shows the most active firms and the value of the subscriptions. Some departments purchased subscriptions to the same study for another fiscal year as well, but since the investment was made in 2003–2004, it is reflected in this table (*).

Similarly, some departments and agencies invested in omnibus questions in addition to their subscription to a syndicated study.

A thematic overview of syndicated studies is provided in Appendix Three, page 39.

Research Firms Rankings

Top Ten Research Firms for All Public Opinion Research by Business Volume

Firm	Thousands of Dollars	Number of Projects
EKOS RESEARCH ASSOCIATES	4,539	80
ENVIRONICS RESEARCH GROUP	3,232	55
IPSOS-REID	2,639	79
PHASE 5 CONSULTING GROUP	1,858	31
LES ÉTUDES DE MARCHÉ CRÉATEC +	1,599	24
MILLWARD BROWN GOLDFARB	1,416	29
DECIMA RESEARCH	1,310	38
SAGE RESEARCH	1,231	25
GPC INTERNATIONAL	1,075	11
POLLARA	885	15

This fiscal year the Government of Canada used the services of 87 research firms to fulfil its public opinion research needs compared with 74 firms in 2002–2003.

EKOS Research Associates was the most active research supplier to the Government of Canada, both in the number of projects and dollar value. It had 80 projects with an approximate value of \$4.5 million.

Environics Research Group placed second with 55 projects and an approximate value of \$3.2 million. Seventeen firms had 10 or more projects each.

A complete listing of all the firms can be found in Appendix Two on p.35.

Top Ten Research Firms for Syndicated Studies by Business Volume

Firm	Thousands of Dollars
EKOS RESEARCH ASSOCIATES	861
IPSOS-REID	515
ENVIRONICS RESEARCH GROUP	423
CROP	161
PERSPECTIVES CANADA	111
COMPAS	109
ENVIRONICS INTERNATIONAL*	105
INSTITUTE OF PUBLIC ADMINISTRATION OF CANADA	86
GLOBESCAN*	67
MILLWARD BROWN GOLDFARB	66

EKOS Research Associates' syndicated studies accounted for just over 30 percent of the investment by the Government of Canada in syndicated studies, down from about 40 percent the previous year.

Ipsos-Reid and Environics Research Group were second and third, respectively.

* *Environics International* changed its name to *GlobeScan* in November, 2003.

Top Ten Research Firms for Custom Research by Business Volume

Firm	Thousands of Dollars	Number of Projects
EKOS RESEARCH ASSOCIATES	3,678	51
ENVIRONICS RESEARCH GROUP	2,808	38
IPSOS-REID	2,124	51
PHASE 5 CONSULTING GROUP	1,858	31
LES ÉTUDES DE MARCHÉ CRÉATEC +	1,599	24
MILLWARD BROWN GOLDFARB	1,350	27
DECIMA RESEARCH	1,297	36
SAGE RESEARCH	1,231	25
GPC INTERNATIONAL	1,075	11
POLLARA	869	14

EKOS Research Associates and Ipsos-Reid both had 51 custom research projects but the dollar value of the EKOS work was higher. In dollar value, Environics Research Group placed second.

Appendix One

Complete Listing of Departments and Agencies by Business Volume

Department/Agency	Thousands of Dollars	Number of Projects
HEALTH CANADA	4,866	105
HUMAN RESOURCES DEVELOPMENT CANADA	3,720	63
CANADIAN HERITAGE	1,758	42
COMMUNICATION CANADA	1,459	22
FOREIGN AFFAIRS AND INTERNATIONAL TRADE CANADA	1,337	23
CANADA CUSTOMS AND REVENUE AGENCY	1,304	21
INDUSTRY CANADA	1,174	38
AGRICULTURE AND AGRI-FOOD CANADA	962	20
NATURAL RESOURCES CANADA	912	31
ENVIRONMENT CANADA	717	27
TREASURY BOARD OF CANADA SECRETARIAT	615	13
CITIZENSHIP AND IMMIGRATION CANADA	561	19
INDIAN AND NORTHERN AFFAIRS CANADA	511	17
DEPARTMENT OF JUSTICE CANADA	510	16
FINANCE CANADA	510	9
CANADA INVESTMENT AND SAVINGS	479	5
PARKS CANADA	425	13
VETERANS AFFAIRS CANADA	413	6
NATIONAL DEFENCE	398	13
TRANSPORT CANADA	324	6
CANADIAN FOOD INSPECTION AGENCY	297	8
PRIVY COUNCIL OFFICE	254	10

Complete Listing of Departments and Agencies by Business Volume (Continued)

Department/Agency	Thousands of Dollars	Number of Projects
ATLANTIC CANADA OPPORTUNITIES AGENCY	243	8
FISHERIES AND OCEANS CANADA	195	6
ROYAL CANADIAN MOUNTED POLICE	194	4
CANADIAN INTERNATIONAL DEVELOPMENT AGENCY	143	5
WESTERN ECONOMIC DEVELOPMENT	128	7
CANADA ECONOMIC DEVELOPMENT FOR QUEBEC REGIONS	126	1
PUBLIC WORKS AND GOVERNMENT SERVICES CANADA	117	3
STATISTICS CANADA	93	6
CANADIAN INSTITUTES OF HEALTH RESEARCH	84	4
NATIONAL ENERGY BOARD	82	1
FINANCIAL CONSUMER AGENCY OF CANADA	75	2
NATIONAL RESEARCH COUNCIL CANADA	66	3
CANADIAN RADIO-TELEVISION AND TELECOMMUNICATIONS COMMISSION	65	2
INFRASTRUCTURE CANADA	51	2
ELECTIONS CANADA	41	2
SOLICITOR GENERAL	32	1
LIBRARY OF PARLIAMENT	28	1
THE OFFICE OF CRITICAL INFRASTRUCTURE PROTECTION AND EMERGENCY PREPAREDNESS CANADA	25	1
NATIONAL ARCHIVES OF CANADA	25	1
PUBLIC SERVICE COMMISSION	24	1
OFFICE OF THE COMMISSIONER OF OFFICIAL LANGUAGES	24	1
COMMUNICATIONS SECURITY ESTABLISHMENT	24	1
LAW COMMISSION OF CANADA	16	1
INTERGOVERNMENTAL AFFAIRS	6	1
STATUS OF WOMEN CANADA	5	1
CANADIAN NUCLEAR SAFETY COMMISSION	5	1
INDIAN RESIDENTIAL SCHOOLS RESOLUTION CANADA	4	1

Appendix Two

Complete Listing of Research Firms by Business Volume

Firm	Thousands of Dollars	Number of Projects
EKOS RESEARCH ASSOCIATES	4,539	80
ENVIRONICS RESEARCH GROUP	3,232	55
IPSOS-REID	2,639	79
PHASE 5 CONSULTING GROUP	1,858	31
LES ÉTUDES DE MARCHÉ CRÉATEC +	1,599	24
MILLWARD BROWN GOLDFARB	1,416	29
DECIMA RESEARCH	1,310	38
SAGE RESEARCH	1,231	25
GPC INTERNATIONAL	1,075	11
POLLARA INC.	885	15
PATTERSON, LANGLOIS CONSULTANTS	492	16
BINARIUS RESEARCH GROUP	440	12
CIRCUM NETWORK INC.	440	11
CROP	383	10
ROYAL CANADIAN LEGION	314	1
CORPORATE RESEARCH ASSOCIATES	304	10
LÉGER MARKETING	274	3
COMPAS	227	10
D-CODE	199	8
ENVIRONICS INTERNATIONAL / GLOBESCAN	196	18
DELTA MEDIA	171	6
R.A. MALATEST & ASSOCIATES	156	4

Complete Listing of Research Firms by Business Volume (Continued)

Firm	Thousands of Dollars	Number of Projects
PERSPECTIVES CANADA	111	4
PHOENIX STRATEGIC PERSPECTIVES	101	5
THE STRATEGIC COUNSEL	96	4
VIEWSTATS RESEARCH	96	1
INSTITUTE OF PUBLIC ADMINISTRATION OF CANADA	86	2
THE BERGER MONITOR	85	3
AD HOC MARKETING	74	4
PRICEWATERHOUSECOOPERS	68	1
THE EARNSCLIFFE STRATEGY GROUP	67	3
IBM BUSINESS CONSULTING SERVICES	67	3
WESTERN OPINION RESEARCH	50	2
FIRST NATIONS CENTRE	50	1
STRATHMERE ASSOCIATES INTERNATIONAL	50	2
BRISTOL GROUP	48	3
CANADIAN MEDIA RESEARCH CONSORTIUM	43	2
ACNIELSEN	41	3
VISION RESEARCH	40	2
PRAIRIE RESEARCH ASSOCIATES	36	3
SQM GROUP	32	2
CARLETON UNIVERSITY SURVEY CENTRE	25	1
GUILBAULT ET ASSOCIÉS	25	1
THE STUDENTS COMMISSION/THE CENTRE OF EXCELLENCE FOR YOUTH ENGAGEMENT	25	1
YOUTHOGRAPHY	25	1
MEMORIAL UNIVERSITY	25	1
PERFORMANCE MANAGEMENT NETWORK	25	1
BEARING POINT	25	1

Complete Listing of Research Firms by Business Volume (Continued)

Firm	Thousands of Dollars	Number of Projects
VALSAR, CONSULTING SERVICE AND OPERATIONS	25	1
CHANGEMAKERS	25	1
GLOBAL CHANGE STRATEGIES INTERNATIONAL	25	1
THE BRAINSTORM GROUP	25	1
ONE WORLD	25	1
SOLUGIK AFFAIRES PUBLIQUES	25	1
ROWANWOOD CONSULTING	24	1
DENNERY RESSOURCES	24	1
DUXBURY, HIGGINS & ASSOCIATES	24	1
GOSS, GILROY & ASSOCIATES	24	1
STRATEGIC NAVIGATOR	24	1
IN-TOUCH SURVEY SYSTEMS	24	1
NP53 MARKETING GROUP	24	1
McCLURE & Co.	21	1
CREATIVE RESEARCH INTERNATIONAL	21	1
ALTITUDE GROUPE CONSEIL	20	1
RESEARCH INNOVATIONS	18	1
CANWEST OPINION RESEARCH	18	1
CANADIAN BUREAU OF INTERNATIONAL EDUCATION	16	1
MASKERY	16	1
GENESIS PUBLIC OPINION RESEARCH	16	1
M.H. & L.T. DICKENSON CONSULTANT	16	1
SATISFACTS RESEARCH GROUP	14	1
PEOPLEWATCH CANADA	12	1
HARLEY HOUSE CONSULTANTS	11	1
INSIGHTRIX	11	1
LEVERUS	11	1

Complete Listing of Research Firms by Business Volume (Continued)

Firm	Thousands of Dollars	Number of Projects
GARY BREEN AND ASSOCIATES	10	1
ENIGMA RESEARCH CORPORATION	10	1
TARGET CALL CENTRE	7	1
FAST CONSULTING	7	1
MALKALM CONSULTANTS	5	1
BATH & ASSOCIATES	5	1
AURORA RESEARCH INSTITUTE (CANADIAN CLIMATE IMPACTS AND ADAPTATION RESEARCH NETWORK – NORTH (NWT))	5	1
JOHN HOWARD SOCIETY OF MANITOBA	5	1
SHARPE DECISIONS	4	1
CONTINUUM RESEARCH	4	1
ALLIUM CONSULTING GROUP	4	1
GALLUP CANADA	0.136	1

Appendix Three

Thematic Overview of Syndicated Studies in 2003–2004

The Government of Canada subscribed to various syndicated studies that dealt with a wide variety of issues. Below is a thematic overview of these studies.

National Public Opinion Overviews

3SC (CROP)

Citizens First (Institute of Public Administration of Canada)

Environmental Monitor
(Environics International/GlobeScan)

Focus Canada (Environics Research Group)

Perspectives Canada (Perspectives Canada)

Rethinking Government
(EKOS Research Associates)

Survey of Border Towns
(EKOS Research Associates)

The Ipsos Trend Report Canada (Ipsos-Reid)

Regional Reports

Atlantic Omnibus Report
(Corporate Research Associates)

Looking West (Canada West Foundation)

North of 60 and Remote Community Monitor
(Environics Research Group)

Ontario Trend Report (Ipsos-Reid)

Options for Western Canada (Ipsos-Reid)

CROP-Express (CROP)

International Issues

Corporate Social Responsibility Monitor
(Environics International/GlobeScan)

Food Issues Monitor
(Environics International/GlobeScan)

Gallup Poll Tuesday Briefing, ePublication
(The Gallup Organization)

Global Issues Monitor
(Environics International/GlobeScan)

International Environmental Monitor
(Environics International/GlobeScan)

Rethinking North American Integration
(EKOS Research Associates)

Rethinking Work: Understanding the New North American Workforce and Workplace
(EKOS Research Associates)

Survey of International Students in Canada
(Canadian Bureau of International Education)

Survey of Sustainability Experts
(Environics International/GlobeScan)

World Monitor (Ipsos-Reid)

Health Issues

Berger Population Health Monitor
(Earl Berger)

Canadians and Obesity – Measuring Awareness: Weighing Options (Ipsos-Reid)

Food for Thought (Compas)

HealthInsider (IBM Business Consulting Services)

Health Vision (ACNielsen)

Kids, Food and Obesity (Ipsos-Reid)

On Call: Compas on Emerging Diseases, Study 2, West Nile Disease (Compas)

The Compas SARS Project (Compas)

The West Nile Virus in Canada
(Decima Research)

High Technology, Innovation and Internet

The Canadian Inter@ctive Reid Report
(Ipsos-Reid)

Canadian Internet Project
(Canadian Media Research Consortium)

Internet Planner (ACNielsen)

The Face of the Web (Ipsos-Reid)

Rethinking the Information Highway
(EKOS Research Associates)

The Dual Digital Divide: Inclusion and Understanding Barriers
(EKOS Research Associates)

Security

Policing Perspectives – Public Perceptions of Law Enforcement in Canada (Pollara)

Public Safety and Security in the New Millennium (Ipsos-Reid)

Public Security Monitor
(EKOS Research Associates)

Business/Economic Issues

The Business Agenda (Compas)

Consumer TrendZ Report – formerly the Goldfarb Report
(Millward Brown Goldfarb)

Investment & Trade Promotion-Communications Product Testing
(The Earncliffe Strategy Group Inc.)

Marketing/Communications

Agricultural Event Marketing Survey
(Enigma Research Corporation)

Canadian Media Relations Review
(Ipsos-Reid)

Other Topics

Building Civic Engagement Among the Information Age Generations (D-Code)

Public Views Regarding Aboriginal People
(Ipsos-Reid)

Reconnecting Government with Youth
(Ipsos-Reid)

SheWatch (PeopleWatch Canada)

Appendix Four

Standing Offers

Series A – Qualitative Research

- The Strategic Counsel Inc.
- Environics Research Group
- The Earncliffe Strategy Group Inc.
- Ipsos-Reid Corporation
- Phoenix Strategic Perspectives Inc.
- Sage Research Corporation
- EKOS Research Associates Inc.
- TNS Canadian Facts Inc.
- Western Opinion Research Inc.
- Patterson Langlois Consultants
- Corporate Research Associates Inc.
- Decima Research Inc.
- Millward Brown Goldfarb
- Les Études de Marché Créatec +
- Pollara Inc.

Series B – Quantitative Research

- Environics Research Group
- The Strategic Counsel Inc.
- Ipsos-Reid Corporation
- Corporate Research Associates Inc.
- Phoenix Strategic Perspectives Inc.

- Millward Brown Goldfarb
- Les Études de Marché Créatec +
- Decima Research Inc.
- Pollara Inc.
- GPC International
- EKOS Research Associates Inc.
- TNS Canadian Facts Inc.
- The Earncliffe Strategy Group Inc.

Series C – Qualitative and/or Quantitative Research

- Environics Research Group
- The Strategic Counsel Inc.
- Ipsos-Reid Corporation
- Phoenix Strategic Perspectives Inc.
- EKOS Research Associates Inc.
- TNS Canadian Facts Inc.
- The Earncliffe Strategy Group Inc.
- Corporate Research Associates Inc.
- Decima Research Inc.
- Les Études de Marché Créatec +
- Millward Brown Goldfarb
- Pollara Inc.

Supply Arrangements

Series A – Qualitative Research

- The Earncliffe Strategy Group Inc.
- Environics Research Group
- The Strategic Counsel Inc.
- Ipsos-Reid Corporation
- Phoenix Strategic Perspectives Inc.
- Decima Research Inc.
- Les Études de Marché Créatec +
- Sage Research Corporation
- TNS Canadian Facts Inc.
- EKOS Research Associates Inc.
- Millward Brown Goldfarb
- Phase 5 Consulting Groups Inc.
- Corporate Research Associates Inc.
- Western Opinion Research Inc.
- Vision Research
- Patterson Langlois Consultants
- GPC International
- Goldfarb Intelligence Marketing Corporation
- Pollara Inc.

Series B – Quantitative Research

- Environics Research Group
- Phoenix Strategic Perspectives Inc.
- The Strategic Counsel Inc.
- Millward Brown Goldfarb
- Decima Research Inc.
- Ipsos-Reid Corporation

- Les Études de Marché Créatec +
- Pollara Inc.
- EKOS Research Associates Inc.
- TNS Canadian Facts Inc.
- The Earncliffe Strategy Group Inc.
- Corporate Research Associates Inc.
- GPC International
- Corum – Continuum Research
- Léger Marketing

Series C – Qualitative and/or Quantitative Research

- Environics Research Group
- The Strategic Counsel Inc.
- Phoenix Strategic Perspectives Inc.
- Decima Research Inc.
- Ipsos-Reid Corporation
- The Earncliffe Strategy Group Inc.
- Les Études de Marché Créatec +
- Millward Brown Goldfarb
- EKOS Research Associates Inc.
- TNS Canadian Facts Inc.
- Corporate Research Associates Inc.
- Pollara Inc.
- GPC International