

Respect Integrity Excellence Leadership

Public Opinion Research
in the Government of Canada

OPINIONS MATTER

Annual Report



2007-2008



Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
Canada

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ANNUAL REPORT 2007-2008

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*Public Opinion Research
in the Government of Canada*

Prepared by Public Works and Government Services Canada

MINISTER'S MESSAGE

I am pleased to present the *Opinions Matter: Public Opinion Research in the Government of Canada* Annual Report 2007–2008.

Public opinion research (POR) is an essential tool to help the Government of Canada both engage Canadians in the public agenda and better understand their needs and expectations. POR also ensures that government programs, services and policies reflect the priorities of Canadians.

The Government of Canada is committed to upholding fairness, openness and transparency and to increasing accountability. In 2007, an Independent Advisor was appointed to review and report on public opinion research practices. The Advisor's report, entitled *Public Opinion Research Practices of the Government of Canada*, was released to the public in December 2007 along with the government's response. The report confirmed that solid control measures are in place and provided valuable recommendations for further improvements, which the government is implementing.

The government is also improving the way funds are managed in public opinion research. In the 2007 status report on the management of advertising and POR, the Auditor General concluded that Public Works and Government Services Canada (PWGSC) had made "satisfactory progress in its control over the expenditure of public funds on...public opinion research activities." In the last quarter of 2007–2008, the government announced expenditure controls to help reduce government-wide POR spending by \$10 million in the 2008–2009 fiscal year. The government also committed to considering options for a system-wide review of public opinion research expenditures to achieve focused results and value for money.

Furthermore, PWGSC is also seeking ways to ensure greater consistency in the quality of public opinion research studies. In 2007–2008, the Department brought together an Advisory Panel on Online Public Opinion Survey Quality to develop new standards and guidelines for the federal research community. These new standards and guidelines—drawn from Canadian, American and international sources—will improve research methods and foster high-quality public opinion research conducted online.

The Government of Canada is taking measures to improve and strengthen the management of public opinion research and to find ways to obtain best value for taxpayers' money. This report documents the steps taken thus far and provides information on the research activities carried out in the 2007–2008 fiscal year. I hope you will find it useful.



Christian Paradis

Minister of Public Works and Government Services



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INTRODUCTION

Role of Public Opinion Research

Public opinion research helps the government to better understand Canadian society and to identify citizens' needs and expectations. It is used to assess the public's response to proposals or to possible changes or initiatives; to assess the effectiveness of policies, programs and services; to measure progress in service improvement; to evaluate the effectiveness of communication activities such as advertising; and to plan and evaluate marketing initiatives, among other applications.

Communications Policy of the Government of Canada

Benefits to Canadians

Public opinion research (POR) benefits Canadians. It is an important tool for government to include the public in the democratic process. By better understanding the views and attitudes of citizens, the government can develop more meaningful policies, programs and services and communicate more effectively with the people it serves. POR is also used to gauge how well the government's programs are performing and to improve the quality of its operations.

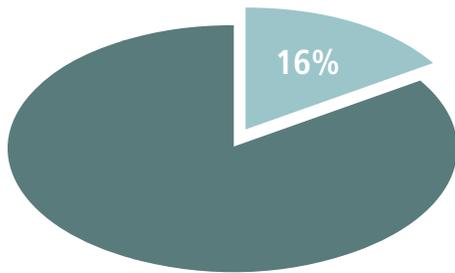
Definition of Public Opinion Research

Public opinion research in the Government of Canada is the planned gathering, by or for a federal institution, of people's opinions, attitudes, perceptions, judgments, feelings, reactions or views. The information may concern a broad range of activities. Examples include policy-making, marketing, communications and advertising, program evaluation, quality of service studies, customer satisfaction studies, and product development.

The information gathered assists in various tasks:

- Developing programs, services and communications products;
- Assessing policy initiatives and plans;
- Designing delivery methods for government programs and services;
- Measuring the demands and expectations of the Canadian population and stakeholders (e.g. businesses); and
- Evaluating programs and services to ensure value for public money spent.

Policies and Programs that Take Account of Canadians' Needs



The government uses POR to identify the need for policies and programs and to understand and take account of how Canadians relate to them. This includes research to develop programs and outreach initiatives to help Canadians make informed choices about their health, safety and security.

Policy development and market research are two types of activities that support this objective. They represented 16 percent of custom research conducted in 2007–2008.

Example: Health and Wellness Priorities

In recent years, Canadians' views on health have shifted to understanding personal health as a lifestyle issue. There is increasing interest in the role of diet, exercise and food safety in maintaining health.

Consequently, Health Canada commissioned research to examine Canadians' health and wellness priorities, including topics such as health and the environment, children's health, healthy eating and active living. The research is feeding into future policy discussions and decision making.

<http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/health/2007/124-07/summary.pdf>

The Research Found

Wellness implies a focus on both physical health and also mental, emotional and spiritual health and their positive impact on quality of life.

The research found:

- The primary health and wellness information sources are the Internet, news media, family and friends, magazines and health professionals;
- Participants are open to an increased focus on preventative measures. They believe that preventative actions and treatments and medical care by the health system should go hand in hand; and
- Information on healthier eating and active living should target parents, children and youth.

Example: Skills development among Atlantic Canadian micro, small and medium-sized enterprises

In 2007, the Atlantic Canada Opportunities Agency examined current attitudes to skills development training within sector-specific businesses of varying sizes. These included Micro enterprises (1–4 employees), Small enterprises (5–99 employees) and Medium-sized enterprises (100–499 employees).

The study involved a survey as well as in-depth discussions with industry and business associations that provide services to small and medium-sized enterprises (SME) and micro enterprises.

The findings are helping to guide the Agency's action to facilitate business skills development in Atlantic firms.

<http://epe.lac-bac.gc.ca/100/200/301/pwgs-c-tps-gc/por-ef/atlantic/2008/166-07-e/summary.pdf>

The Research Found

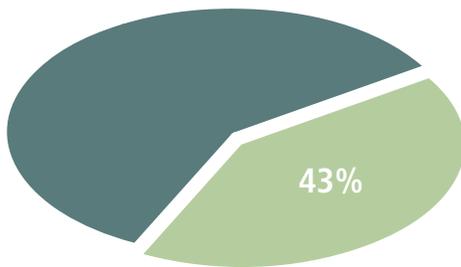
The November 2007 study on Skills Development among Atlantic Canadian Micro Enterprises and SMEs showed that 77% of Micros and SMEs considered workshops and training sessions on various business management skills to be the most helpful to address skills gaps.

The study on Skills Development asked the benefits to the company of upgrading skills. The survey found that "increased knowledge/skills/education" (22%) were the most frequently mentioned benefit, along with "increases productivity" (20%). One in ten (9%) believes that upgrading employees' skills "makes people/business more efficient." Only 9% believe upgrading skills "does not benefit the company."

Benefits of Upgrading Skills to the Company



Serving Canadians Better



POR is used to understand how people view government services and to measure how satisfied they are with the services provided. The government uses this information to design and tailor its services to achieve results for Canadians. This type of research also helps identify the best approaches to reach out to the public by gaining an understanding of their perspectives and experiences.

Example: Service Canada Service Standards Renewal

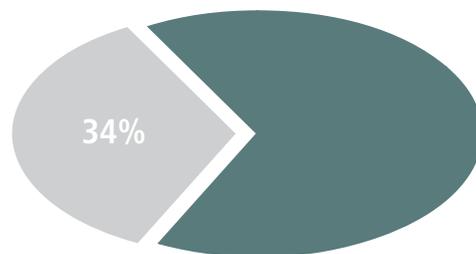
To help build a citizen-centred approach to service, Service Canada conducted focus group testing of service standards that were being rewritten from a client's perspective. The study involved a total of 15 focus groups in Ottawa, Montréal and Winnipeg. In each city, two focus groups were conducted with members of the general public. Other groups focused on a specific target audience, such as seniors, youth, persons with a disability, Aboriginal Canadians and new Canadians. The information collected through this research is helping Service Canada validate client expectations and set responsive service standards.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/service_canada/2008/425-07-el/summary.doc

Evaluation research enables the government to track quality and service indicators, to report on the progress and success of its programs and services, and to identify possible improvements. The *Nahanni NPR Visitor Survey* by Parks Canada is a good example. It is described in the Highlights of Public Opinion Research Projects section of this report.

These types of research accounted for 43 percent of custom research in 2007–2008.

Informing Canadians



The government has a duty to explain its policies and decisions and to inform the public of its priorities for the country. POR helps to ensure that information about policies, programs and services is clear, credible and targeted to the appropriate audiences. This includes research to pre-test and post-test government advertising and to develop, refine and test other types of communications products, such as guides, pamphlets and Web sites.

The Government of Canada regularly pre-tests advertising associated with major campaigns to ensure that funds are invested wisely and that messages are well communicated. Pre-testing is mandatory for campaigns with a media buy of \$400,000 or more.

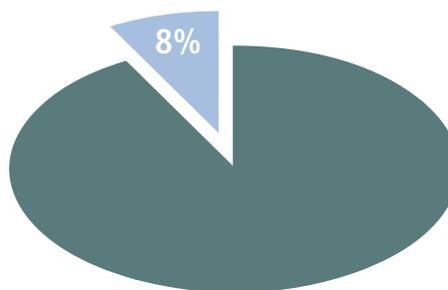
Post-testing of advertising is used to attribute recall, attitude and behaviour changes resulting from major campaigns. In February 2008, post-testing became mandatory for campaigns with a media buy of \$1 million or more—an increase from the previous threshold of \$400,000.

Web site research involves the testing of new or revised Web pages, including their functionality, comprehensiveness, and utility. Government departments test the content, format, features, and ease of navigation of Web sites to ensure that they meet the needs of the intended user—most notably the Canadian public.

These types of research represented 34 percent of custom research conducted in 2007–2008.

For an example of advertising-related POR, see the Veterans Affairs Canada *Post Testing of the Lest We Forget Vignette* study described in the Highlights of Public Opinion Research Projects section of this report.

An Emphasis on Quality

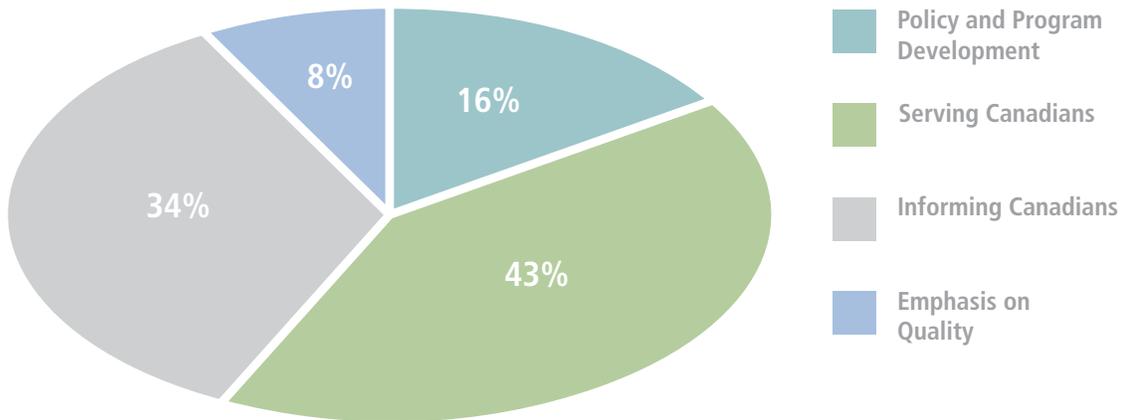


In 2007–2008, the government also looked at ways to improve the quality of its research. For example, advisory panels made recommendations on survey standards, pre-testing questionnaires to avoid problems with the research instrument before the fieldwork, readership studies, usage of documents and knowledge and awareness benchmark studies. To improve the quality of its services, the government also conducted internal organizational research with its employees and employee applicants. The research assists in creating a more productive working environment.

These research activities accounted for eight percent of custom research in 2007–2008.

For an example of this type of research, see the *Advisory Panel on Online Public Opinion Survey Quality* described in the section of this report entitled How Public Opinion Research is Managed in the Government of Canada.

Categories of Custom Research, 2007–2008



Percentages add up to more than 100 due to rounding of numbers.

All Opinions Matter

POR studies undertaken by the government reach a wide range of Canadians. They include the general public, users of government services and those in particular segments of the population, such as parents, victims of crime, business people, seniors, potential military

and public service recruits, youth, Aboriginal people and persons with disabilities. When their opinions are heard through research such as surveys and focus groups, Canadians can play a role in influencing the government decision-making process.

Strengthening Accountability

The government has taken action to improve fiscal responsibility and accountability. In the last two years, new legislation, regulation and policies for public opinion research were introduced. Provisions of the *Federal Accountability Act* and its related Action Plan committed the government to undertake a full independent review of POR practices. These are fostering research that is politically neutral, cost-effective and focused on government priorities.

Report of the Independent Advisor and the Government's Response

In April 2007, Daniel Paillé was appointed as Independent Advisor to conduct a full review of POR practices in the Government of Canada. The aim was to ensure that POR practices are open, transparent, fair, and provide value for Canadian taxpayers.

The review covered 1990 to 2007. A representative sample of 313 projects was examined. Research industry professionals, members of Parliament and government employees were consulted. The purpose was twofold: to determine whether issues raised in the Auditor General's 2003 report on POR required further inquiry, and to advise on whether there were issues in the management of POR that needed to be addressed.

Mr. Paillé's report, entitled *Public Opinion Research Practices of the Government of Canada*, was released in December 2007 (<http://www.tpsgc-pwgsc.gc.ca/apropos-about/li-fal-rop-por-eng.html>). The report acknowledged improvements made since the Auditor General's November 2003 report, and included 24 recommendations in three key areas:

- Ensuring value for money;
- Strengthening procurement; and
- Reinforcing political neutrality.

The government's response, along with a detailed plan to address Mr. Paillé's recommendations, was released at the same time as his report (<http://www.tpsgc-pwgsc.gc.ca/apropos-about/li-falrg-gr-eng.html>).

Public Works and Government Services Canada (PWGSC) and the Treasury Board of Canada Secretariat (TBS) have been working with other departments and the POR industry to implement this plan.

Expenditure Controls

In February 2008, the government announced additional expenditure controls to reduce government-wide POR spending by \$10 million in fiscal year 2008–2009.

The measures include:

- **Ministerial approval:** To provide greater oversight and rigour, ministers must approve all departmental contracted public opinion research.
- **A freeze on purchases of syndicated studies:** The freeze will remain in effect during development of new and more cost effective arrangements for government purchase of such studies.
- **A higher threshold for advertising post-campaign evaluation:** The previous threshold of \$400,000 will be raised to \$1 million.

The government also initiated a system-wide review of public opinion research to achieve focused expenditures and best value for taxpayers' money.

Progress in Implementing Recommendations of the Auditor General

In 2005, the Auditor General recommended that the Public Opinion Research Directorate at PWGSC place sufficient emphasis on providing expert advice to departments and agencies on survey quality. In response, the directorate commissioned a panel of experts to develop standards for telephone survey quality (*Advisory Panel on Telephone Public Opinion Survey Quality*). In 2007, a second advisory panel was commissioned to address online survey quality. Its report, entitled *Advisory Panel on Online Public Opinion Survey Quality*, was submitted in March 2008. The results of both panels are being used to establish research-data quality standards. The standards are being shared with departments and the Marketing Research and Intelligence Association (MRIA). They will be incorporated into future contracts for custom public opinion research studies.

The Public Opinion Research Directorate also commissioned Statistics Canada to teach the government research community about non-response bias. The course, entitled *Survey Non-Response Bias: Causes, Consequences, Prevention and Treatment*, provided a working framework to deal with the issue.

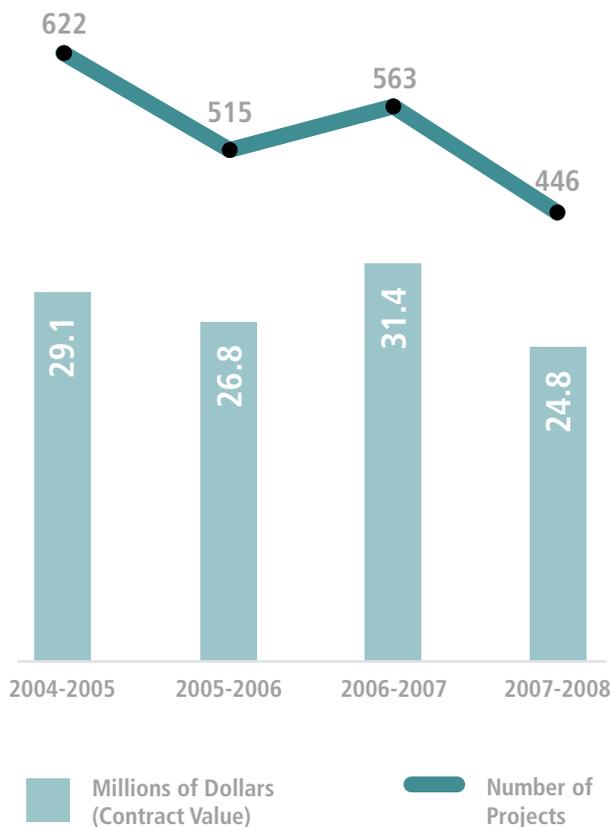
The Auditor General's 2007 status report on the management of advertising and POR included the observation that PWGSC had made "satisfactory progress in its control over the expenditure of public funds on... POR activities." (*February 2007 Status Report, Chapter 1—Advertising and Public Opinion Research.*) The report recommended that departments notify PWGSC of planned research before contacting research firms. This requirement has been included in government processes and publications. Furthermore, departments are being reminded of the need to comply with this policy requirement.



BUSINESS VOLUME

in Public Opinion Research in the Government of Canada

Total Projects Coordinated by the Public Opinion Research Directorate



The amount reported is for contracts and amendments issued during each fiscal year. Individual projects may be carried out over more than one fiscal year. Figures for previous years may vary slightly from those in previous annual reports.

In 2007–2008, 446 public opinion research projects worth \$24.8 million were coordinated through the Public Opinion Research Directorate. This is down from \$31.4 million the previous year.

Most Active Departments and Agencies

Department/Agency	Contract Value (Thousands of Dollars) ¹	Number of Projects
Health Canada ²	\$4,799	67
Human Resources and Social Development Canada ³	\$3,318	47
Canada Revenue Agency	\$1,968	29
National Defence	\$1,299	18
Natural Resources Canada	\$1,157	23
Environment Canada ⁴	\$986	27
Parks Canada	\$892	27
Foreign Affairs and International Trade Canada	\$853	14
Citizenship and Immigration Canada	\$753	12
Canadian Heritage	\$750	12

NOTES

- ¹ Includes projects undertaken under task authorization contracts in the 2007–2008 fiscal year.
- ² Includes the Public Health Agency of Canada.
- ³ Human Resources and Social Development Canada was created on February 6, 2006, through the consolidation of the former Department of Human Resources and Skills Development and the Department of Social Development. Its POR contracts in 2007–2008 were awarded under the still legal names of its two predecessor departments.
- ⁴ Includes the Canadian Environmental Assessment Agency.

Health-related research has predominated for several years, reflecting the fact that health care continues to be a top priority for Canadians. This trend continued in 2007–2008. Contracts awarded on behalf of Health Canada accounted for 19.4 percent of the total value of contracts and 15 percent of the total number of projects. Human Resources and Social Development Canada was the second highest with 47 POR projects valued at just over \$3.3 million. Only five departments had research in excess of \$1 million, compared with ten during the previous year.

Custom and Syndicated Research

Custom public opinion research is work commissioned for specific departments or agencies for the exclusive use of the government. The commissioning organization holds the intellectual property rights to reports and other materials generated by the project. It makes these products available to other federal organizations and the public through Library and Archives Canada. Parliamentarians and the media have access through the Library of Parliament. Custom research accounts for most of the POR work undertaken by the government.

Syndicated research studies are developed by suppliers who, in turn, make them available to paying subscribers in the private and public sectors. These off-the-shelf products often contain trend information on various topics. The suppliers retain copyright and sole responsibility for managing the content. Subscribers are normally prohibited from distributing the information to non-subscribing parties. As the research costs are shared among the subscribers, syndicated research is sometimes a cost-effective option for meeting a departmental research need and obtaining information on hard-to-reach populations and highly specific target groups.

In 2007–2008, 94 percent of the total value of public opinion research contracts was for custom research products; that is, 379 projects worth \$23.3 million. Contracts for syndicated studies amounted to \$1.4 million and involved 67 projects.

In February 2008, the government announced a freeze on the purchase of syndicated studies while it examines options to obtain more favourable purchasing arrangements.

NOTE

See Appendix III for a thematic overview of syndicated studies purchased by the Government of Canada in the reporting period.

Approaches to Custom Research

- **Quantitative research** follows a systematic approach to collect and analyze information. The information is gathered in carefully structured ways. This includes surveys conducted by telephone, on the Internet, or face-to-face; exit interviews; mailed questionnaires; and self-completed diaries.

A quantitative approach is used when statistics are required to draw conclusions. The results from quantitative research can be generalized to the population being studied. The approach can be used to evaluate the effectiveness of a program, service, or advertising campaign, to measure customer satisfaction, to identify market segments, and to track changes in the public's attitudes, behaviour and use of products and services.

In the reporting year, 46 percent of research fell into the category of quantitative research, unchanged from 2006–2007.

- **Qualitative research** is used to gain insight into people's intentions and perceptions. It explores their opinions on particular topics in more depth than is possible with a survey. Qualitative methodologies cannot yield data that can be generalized to the population being studied because the research is not based on the random selection of respondents. Commonly used types of qualitative research include focus groups, personal interviews and small group discussions.

Qualitative research can be used to generate new product, program or service concepts. It can examine clients' knowledge of, and experiences with, a product, program or service. For a publication or Web site, it can test clarity and comprehension of the content or format. It can also be used to pre-test concepts for an advertising campaign.

In 2007–2008, 33 percent of custom research fell into this category, up from 32 percent in the previous year.

Projects consisting of a combination of quantitative and qualitative research accounted for the remaining 21 percent of projects undertaken during the fiscal year.

Geographic Reach of Surveys, and Locations of Focus Group Studies Conducted for the Government of Canada in 2007–2008

The map, *Government of Canada Public Opinion Research 2007–2008: Geographic Reach of Surveys and Locations of Focus Groups* indicates the following:

- 1) The areas surveyed by the Government of Canada in 2007–2008. Many telephone surveys included all area codes in Canada. Residents of all provinces and territories with landline telephone numbers were included in the samples.
- 2) The number and locations of focus groups. The information is from studies undertaken in 2007–2008 for which final POR reports were available at the time of publication of this report.

Target Groups Reached

POR is conducted among a wide variety of audiences. The table below presents 75 specific target groups reached by POR studies conducted in 2007–2008.

Aboriginal people	Forest Industry	Permanent residents
Business people	General Population	Police officers
Canada Student Loans Program borrowers	Health professionals	Probation officers
Canada Access Grant for Students from Low-income Families recipients	Homeowners	Public servants
Canadian Forces members	Households with children living at home	Restaurant sector
Cellphone-only households	Human resources specialists	Scientists
Chief executive officers (CEOs)	Immigrants and newcomers	Self-employed Canadians
Chinese Canadians	Industry representatives	Seniors
Clients of various GC programs	Internet users	Single individuals
Committee of Equal Access and Participation	Judges	Smokers
Community members	Lawyers	Spouses
Construction sector	Low income families	Stakeholders
Consumers	Municipal officials	Students
Consumer contact centre agents	Non-governmental organizations	Taxpayers
Counsellors	Northern Canadians	Teachers
Court personnel	Nurses	Travellers
Decision makers	Opinion leaders	Truck and bus drivers
Drivers	Owners and/or managers of historic sites	Unemployed Canadians
Educators	Parents	Vehicle owners
Employees	Patients groups	Veterans
Employers	People whose mother tongue is neither English nor French	Visible minorities
End users	People with higher education	Visitors of government Internet sites
Environmentally-conscious individuals	People with HIV/AIDS	Visitors of various events/sites
First Nations people	People with lower education	Wage earners
	People with specific health conditions	Women
		Younger Canadians



Area covered by surveys

- Locations where 1 focus group was conducted
- Locations where 2 to 4 focus groups were conducted
- Locations where 5 or more focus groups were conducted

Note: The locations and number of focus groups displayed in the map represent information from studies undertaken in 2007–2008 for which final POR reports were available at the time of publication of this report.

Government of Canada Public Opinion Research 2007–2008:

*Geographic Reach
of Surveys and Locations
of Focus Groups*



Procurement Methods in Public Opinion Research

The Government of Canada uses various procurement methods to contract public opinion research. Standing offers and supply arrangements were established competitively in 2004. In 2007–2008, 77.3 percent of the total value of contracts issued (\$24,760,034) were awarded through the standing offers. Another 3.8 percent (\$939,031) were awarded through supply arrangements. The value of contracts for public tenders (MERX) was \$2,173,343.84 or 8.8 percent of the total. Syndicated studies accounted for \$1,414,462 or 5.7 percent. Specialized research services not offered through the standing offers or supply arrangements accounted for \$1,078,385, or 4.4 percent of the total. These are typically low dollar value requirements below \$25,000.



HIGHLIGHTS

of Public Opinion Research Projects

This section contains a review of public opinion research activities in the 10 departments and agencies that were most active in 2007–2008. It also presents projects of note from other departments and agencies.

Health Canada

Again in 2007–2008, public opinion research played a key role in helping Health Canada and the Public Health Agency of Canada (PHAC) achieve their goals of promoting and protecting the health of Canadians and making this country's population among the healthiest in the world. POR provided the base required for decision-making and action on health risks. It helped determine public perceptions on various risk issues, the information that was needed to respond to these risks, and the preferred delivery method.

Numerous quantitative and qualitative research projects were conducted to help shape policy, program and communications initiatives. The research helped ensure that Health Canada/PHAC effectively filled its roles as a leader/partner, donor, guardian/regulator, service provider and information provider.

The Research Found

In February 2008, Health Canada conducted a quantitative study with Canadian youth smokers and vulnerable non-smokers on the effects of modifications to cigarette packaging. The study examined the relationship between message effectiveness and size of health warning messages (HWMs). The study found that:

- If the size of current HWMs was increased from 50% to 75% of the total surface of tobacco packages, there would be a small but important impact on many of the 38 indicators measured.
- To achieve substantial effects, increasing the size of HWMs to at least 90% is required. Substantial effects were observed on: convincing various styles of smokers to stay away from smoking; connecting with their emotions and shocking them; and making cigarette packages less attractive.
- When increasing HWMs to 100%, substantial effects were observed on smoker image and product image.

<http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/health/2008/254-07-e/summary.pdf>

The research examined Canadians' health and wellness priorities, and explored views on issues such as diabetes, healthy eating, healthy pregnancy, pandemic influenza, mercury in fish and nutrigenomics. Advertising campaigns were evaluated, including the National Anti-Drug Strategy, Healthy Eating and the Children's Fitness Tax Credit. The Tobacco Control Directorate at Health Canada tested cigarette health warning messages and explored recall of tobacco industry advertising among the general public and youth. The research found that cigarette health warning messages are highly effective in persuading some smokers to smoke less around others, increasing their desire to quit, and convincing them to try.

During the past year, a comprehensive research agenda was completed with parents of youth to shape and evaluate the parental component of the National Anti-Drug Strategy social marketing campaign. The research involved the use of qualitative methodologies (e.g. exploratory focus groups, testing of proposed creative elements, Web site usability testing) as well as quantitative methodologies (e.g. baseline survey of knowledge, attitudes and behaviours, and a return to sample recall survey of radio, print and Web banner ad components of campaign). Both types of research helped ensure that Health Canada developed various communications tools that appealed to the target audience, triggered action and allowed the effectiveness of this initiative to be measured not only in the short term but also over the five-year course of the campaign.

Human Resources and Social Development Canada

Public opinion research at Human Resources and Social Development Canada (HRSDC) and Service Canada is conducted to support policy and program development, as well as their communications activities. Three POR projects are described here.

Canadian Attitudes toward Labour Market Issues

Human Resources and Social Development Canada conducted a public opinion survey on labour market issues among 3,000 adult Canadians to obtain an in-depth and rigorous analysis of public opinion and its implications on policy and communications. The research was needed to build on commitments undertaken in 2006 and 2007, such as bilateral negotiations with provinces and territories on labour market agreements. The survey allowed the Department to better understand the perceptions of Canadians regarding labour market challenges and opportunities. With this understanding, the Department was better able to deal with concerns and build stakeholder support.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgcl-por-ef/human_resources_social_development_canada/2008/151-07-el/summary.pdf

Departmental Tracking Survey

HRSDC conducts a yearly tracking study to better understand what Canadians perceive to be the Department's priorities. Perceived performance is also assessed. The 2007–2008 study consisted of a quantitative component where 2,000 Canadians participated in a telephone survey, and a qualitative component where 12 focus groups were carried out nationwide.

During the first wave of the quantitative study respondents were asked to rate the priority level of 22 key social and economic issues. The second wave sought to have 1,000 of the respondents choose one priority over the other. The 22 priorities were divided into subsets of eight social priorities and 14 economic priorities. The top social issue for Canadians was 'Addressing child poverty in Canada' while the economic concern was 'Ensuring the sustainability of the Canada Pension Plan (CPP) and Old Age Security (OAS)'.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-eflhuman_resources_social_development_canada/2007/164-07-elsummary.pdf

The qualitative component consisted of focus groups, which explored HRSDC's six economic and social priority issues identified in the first two quantitative components of the study. This included how the participants defined and understood these issues, what linkages they made between them, and how these social issues might best be addressed. The study also focused on prioritizing a range of labour market policy interventions, including awareness of current action and suggestions for future direction of policy.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-eflhuman_resources_social_development_canada/2008/164-07a-elsummary.pdf

The results of the HRSDC tracking survey help to bridge knowledge gaps by focusing on the specific departmental issues where relevant information from syndicated or custom research is lacking. The results are also used in the development of communications plans and public environment analyses.

Qualitative Research on Recruitment

The Government of Canada is facing challenges to fulfill its mandate of providing the public with information about government policies, programs and services. With a significant number of communications specialists planning to retire in the near future, recruitment is of key importance. Research was therefore conducted to determine how the Government of Canada could attract new information services specialists.

A series of 12 focus groups were conducted with recent communications graduates and students majoring in communications-related programs at Canadian universities or in joint college/university programs. In-depth interviews were also conducted with career counsellors in Canadian universities and colleges offering communications-related programs.

The research concluded that while public service is not necessarily the first career choice for students, they were open to learning about what opportunities are available in the federal government. Findings from the study will help direct development of a long-term human resources strategy in support of federal departments and agencies.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-eflhuman_resources_social_development_canada/2008/293-07-elsummary.pdf

Canada Revenue Agency

In 2007–2008, the Canada Revenue Agency (CRA) continued to focus its public opinion research on services and program delivery. The agency's third annual corporate survey examined what individual Canadians think about the CRA. The survey provided data for comparison with the original baseline survey conducted in 2005, to identify trends. This year, part of the survey explored the impact of the brief interruption of electronic service that occurred in March 2007. The findings were used in CRA's strategic planning exercise, in communications planning and in corporate reports such as the annual report to Parliament and the Commissioner's report to the provinces and territories.

The CRA continued to examine and evaluate its existing electronic services and to test new service offerings. One study examined the utility of providing information targeted to tax professionals through the agency's Web site. Another project, involving provincial partners, industry associations and small and medium-sized enterprises (SMEs) and their intermediaries, examined the feasibility of introducing new accounting software standards. Other research provided feedback from the public about the NETFILE and My Account online services. The CRA also tested the usability of aspects of the CRA Web site, including new home page concepts, the site's information architecture, the online application for the Canada Child Tax Benefit, and the My Account and My Business Account services.

The agency researched Canadians' awareness of charity issues and tested the redesigned form that charities are required to file. In addition, CRA tested the application forms for the new Working Income Tax Benefit, and tested and evaluated its two advertising campaigns (Business E-Services and Individual Tax Relief) to monitor their effectiveness.

Another project looked at Canadians' awareness, motivations and attitudes regarding tax compliance issues. This study explored Canadians' general awareness of enforcement and compliance issues, evaluated compliance with GST/HST remittance requirements, and conducted message testing and research into the motivators of the underground economy in the restaurant and construction industries.

Results from the studies conducted by Canada Revenue Agency during 2007–2008 are being used to:

- Develop communications products and strategies;
- Design compliance enforcement approaches; and
- Aid the CRA in its joint activities with provincial and territorial tax administrations.

National Defence

In 2007–2008, National Defence undertook various public opinion research initiatives.

Custom research projects in 2007–2008 had three main objectives:

- To assess awareness and views of the Canadian Forces and its activities;
- To measure program effectiveness and client satisfaction; and
- To measure awareness and effectiveness of recruitment advertising campaigns.

There was a major focus on how Canadians view the military and its activities. Outreach initiatives for Operation CONNECTION—a wide-ranging recruitment drive—continued to be assessed to track their success and lasting impact on knowledge and views of the Canadian Forces. A few projects sought to identify the views of specific segments of the Canadian population, whether by region or demographic group, about the Forces' role. The studies also assessed those segments' intent to enlist or recommend enlistment in the Canadian Forces.

The annual study of communications and policy issues also provided tracking data on the views about the Canadian Forces, including its role in Afghanistan. The sample size of the quantitative component allowed for comparative regional analysis. The qualitative component was useful in determining Canadians' views and distinguishing between support for the mission versus support for the troops, among other things.

The Research Found

In February 2008, National Defence conducted a study to assess the perspectives of Canadians regarding the Canadian Forces and related military issues, including Canadians' awareness, knowledge and adoption of the priorities and messaging of the Defence Strategy and knowledge and support for the Canadian Forces' roles.

The research found:

- Nearly 9 in ten Canadians (87%) have a positive overall impression of the people who serve in the Canadian Forces;
- Nine in ten Canadians (92%) feel it is important that Canada's military respond to international situations to provide humanitarian assistance.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/national_defence/2008/281-07-e/summary.doc

A few studies assessed programs and services for Canadian Forces members and their families. For example, the Military Family Services Program study assessed the experience of users of the program and whether its support for military families and communities enhances the Forces' operational effectiveness.

Other projects included pre-testing of concepts for recruitment advertising campaigns, as well as post-campaign evaluations. The research built on the findings of recent psychodemographic research with young Canadians. Part of the Department's research sought to gain a better understanding of recruitment issues and opportunities from certain segments of the population, notably visible minorities and Aboriginal communities.

Results from custom and syndicated research are used to:

- Design the department's three-year Strategic Communications Plan;
- Design a number of issue-specific communications plans;
- Identify, refine and assess recruitment advertising concepts;
- Provide feedback on a number of services and communications activities; and
- Assist in developing a variety of communication products, messages and strategies.

Natural Resources Canada

Natural Resources Canada (NRCan) conducted a wide range of public opinion research in 2007–2008. During the year, the environment continued to rival health care and the economy as the leading top-of-mind issues for Canadians. At the same time, a growing concern was the sustainable management of Canada's natural resources, especially in the area of energy production and use. In this context, NRCan used research to help in the development, refinement and implementation of its programs and services.

Opinion research dealt with energy and environment issues such as market penetration and acceptance of solar domestic hot water technologies, awareness of ENERGY STAR high-efficiency products, and stakeholder views of an energy labelling program for buildings. Research also helped to evaluate NRCan's programs and services in the mining and forestry sectors.

NRCan conducted a study with Canadian businesses regarding the use of new collaborative technologies. This study found a similar level of awareness of the new Web 2.0 applications among corporate executives and the general population. NRCan also conducted similar research with Canadian business leaders. This complemented an inter-departmental project with the general population called *New Technologies and Government of Canada Communications*, see section of this report entitled Other Notable Projects. The business sector is an important one for NRCan and the results of this research provided context and understanding for department program managers seeking to enhance the way the Department engages its external stakeholders.

Environment Canada

During 2007–2008, Environment Canada focused its public opinion research initiatives on a number of issues of concern to Canadians. The Department also conducted research on its online information services for the public, as well as its program operations.

Air quality remained a major focus. Environment Canada commissioned a qualitative study of how Canadians relate to radio, Internet and television weather forecasts, including the Department's new Air Quality Health Index (AQHI). The aim was to gauge public reaction to the AQHI in terms of its interpretation, comprehension, relevance, usefulness and relationship to the UV Index. The results will help guide broader implementation of the AQHI nationwide. The Department also continued a multi-year project measuring the effectiveness of its Air Quality Forecast Program.

One quantitative project sought to evaluate the success of marketing efforts related to several ecoACTION program initiatives. The Department also completed a series of iterative surveys dealing with environmental issues and public perceptions of the Government of Canada's broader environmental agenda. The information was used to inform the government's communications efforts on environmental issues.

Other initiatives in 2007–2008 included employee research, continued testing of improvements to Environment Canada's online resources (including a major update of web-based weather services to Canadians), and testing of user needs and products under the Canadian Environmental Sustainability Indicators initiative.

Parks Canada

Parks Canada's National Parks, National Historic Sites and National Marine Conservation Areas provide opportunities for visitors to have meaningful heritage experiences. Parks Canada's mandate is to protect and present nationally significant examples of Canada's natural and cultural heritage and foster public understanding, appreciation and enjoyment in ways that ensure their ecological and commemorative integrity for present and future generations.

Public opinion research conducted during the 2007–2008 fiscal year is helping Parks Canada to offer the most benefits to Canadians from Canada's natural and cultural heritage. Among other things, the research allowed Parks Canada to: develop service standards; evaluate current programs, services and infrastructure; answer to clients' needs; and offer improved services to Canadians.

Parks Canada Service Standards

Parks Canada is developing a national suite of service standards that will provide direction and goals in the area of service quality for national parks, national historic sites, and national marine conservation areas. Results from earlier research suggest that Parks Canada is held to a higher standard than other parks and heritage systems in terms of natural, recreational and educational value offerings. The Agency must deliver high standards of service.

As part of its efforts, Parks Canada conducted qualitative research to better understand what Canadians consider to be attributes of exceptional customer service. A total of nine focus groups were conducted in three locations (Edmonton, Montréal and Halifax), with audiences having varying degrees of interaction with Parks Canada's places over the last five years (e.g. have not visited, have visited). The research identified relevant service standards for Parks Canada, how it could set itself apart from other service providers to exceed visitors' expectations and contribute to memorable experiences.

Nahanni NPR Visitor Survey

Parks Canada continued to conduct public opinion research at Nahanni National Park Reserve (NPR) to ensure that services offered were still in line with Canadians' desires and expectations. A visitor survey in Nahanni National Park was undertaken to better understand what attracted visitors to the park and which aspects of the park visitors felt could be improved. Overall, it was found that the vast majority of visitors were satisfied with their trip, taking into account staff service and personal expectations. When compared with results from previous years to identify any important changes in service. The 2007 study demonstrated that the park has improved its approval rating among visitors.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/parks_canada/2008/317-07/summary.doc

Signal Hill and Cape Spear National Historic Site Heritage Presentation Program Offer

Parks Canada undertook qualitative research to better understand the needs, wants and expectations of visitors to Signal Hill and Cape Spear National Historic Sites in Newfoundland. The research, which involved in-person interviews with on-site visitors, was used to make informed decisions about how to enhance the current heritage presentation program offered at both sites.

Most visitors interviewed were impressed with both historic sites. The research also revealed that there were opportunities for improvement. Visitors suggested that flexible interpretative programs would help accommodate different schedules, preferences and experiences. Visitors also recommended that Parks Canada improve opportunities to raise awareness about the sites and the programs offered.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/parks_canada/2007/122-07/summary.doc

Public Evaluation of a Handheld Locative Trail Guide

Parks Canada is looking at ways to improve and enhance visitor experience and learning opportunities at its national parks and national historic sites. In 2007, Parks Canada conducted research to define and describe the current target audience for mobile/locative interpretive experiences in Banff National Park, based on a User Receptivity Survey. The research also evaluated the effectiveness of, and determined user preferences for, handheld location-based content and devices on Banff trails, based on a Public Field Trial Evaluation of Tracklines. Visitors to and residents of the Town of Banff were surveyed about preferences for and willingness to use portable media guides while on the Hoodoo Trail in Banff National Park. Visitors were found to enjoy the portable guide and indicated that it can be effective as a learning medium. They also provided constructive feedback on the device's audiovisual components and preferences for options, including associated equipment.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/parks_canada/2008/118-07/summary.doc

Foreign Affairs and International Trade Canada

Foreign Affairs and International Trade Canada (DFAIT) uses public opinion research to track Canadians' views, attitudes, opinions, and values concerning international affairs, programs and service delivery, and to evaluate new technologies.

In 2007–2008, the Department conducted the sixth wave of its Corporate Communications Survey. The study examined Canadian attitudes toward global issues, regions and countries deemed important to Canada. It also examined Canadians' familiarity with DFAIT activities, asked them to rate the Department's performance against key indices and to rank foreign policy priorities, and probed perceptions of the drivers behind foreign policy. The survey helps departmental communications specialists understand the public environment in which they operate.

The Corporate Communications Survey dealt with the use of electronic communications tools, attitudes toward Canada as a destination for foreign students, consular services and DFAIT internal communications. The Department also conducted studies to assess the effectiveness of the Trade Commissioner Service (TCS). The *DFAIT Trade Commissioner Service Advertising Campaign ACT Survey* showed that 74 percent of businesses that had used the TCS were happy with the services received.

A survey of business leaders provided useful information to the Department's communications specialists working on trade issues. Business leaders' answers revealed that slightly more than a quarter of Canadian firms are doing business abroad, while a handful of others are export-ready.

DFAIT will use the results of these studies to make informed policy decisions and develop a communications approach in 2008–2009.

Citizenship and Immigration Canada

Citizenship and Immigration Canada (CIC) selects immigrants and temporary residents, assists with immigrant settlement and integration, and offers Canada's protection to refugees. CIC also grants Canadian citizenship, and promotes the rights and responsibilities inherent in citizenship. It conducts public opinion research to help provide guidance for communications, policy and program development, and service improvement.

In 2007–2008, CIC's Citizenship Branch used two major public opinion research projects to meet key strategic and policy objectives related to integration, civic participation and citizenship:

- A series of focus groups explored the reasons and motivations for naturalization among newcomers, permanent residents and already naturalized Canadian citizens; and
- Another series of focus groups explored civic practice—its determinants, perceived value, and potential barriers to a higher level of practice—among newcomers to Canada, established immigrants and Canadian-born citizens.

CIC's Communications Branch used public opinion research in support of program and policy development, e-communications and outreach, as well as for the refinement of CIC service delivery channels.

- The CIC Annual Tracking Survey provides an update on public opinion. Three waves of research allow for successive updates on key indicators. The 2007–2008 study gave the Department insight into important areas of public opinion, such as support for immigration levels; reaction to immigration, refugee and citizenship policy; and likely drivers of public opinion in these areas; and
- CIC also subscribed to syndicated studies that provided additional information and insights into issues related to the Department's mandate.

Other key research included the following:

- A series of domestic and international usability interviews assessed the redesign and proposed refinements used as part of CIC's Client Service Modernization Initiative to re-launch the Department's Web site on June 11, 2007;
- Two phases of research assessed the Going to Canada immigration portal for usability and client satisfaction;
- CIC's marketing and outreach used qualitative research to test the message of ads to be used by the Department's Foreign Credentials Referral Office in a national advertising campaign. The subject of the campaign was the assessment and recognition of foreign qualifications for both regulated and non-regulated occupations in Canada. The research gauged the effectiveness of the ads in communicating the office's program elements and information; and
- The Service Improvement Office and the Operations and Partnership Support Unit used public opinion research to assess new CIC service standards, CIC document utilization and the new Interactive Voice Response system.

The Research Found

In the December 2007 Foreign Credentials Referral Office (FCRO) Advertising Post Evaluation study, respondents were asked to identify economic sectors that have the greatest need for foreign workers. Healthcare was mentioned by over two in five respondents (45%), followed by agriculture (18%) and skilled trades (17%).

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/citizenship_immigration/2008/315-07-e/summary.doc

Canadian Heritage

In 2007–2008, Canadian Heritage conducted public opinion research primarily in support of program renewal and evaluation initiatives. The research is used for ongoing performance measurement and cycle-based evaluations.

One project of particular note for its scope and impact was on the proposed content of the Canadian Museum for Human Rights.

In 2007, the Prime Minister announced that the Government of Canada had reached an agreement with four public- and private-sector partners to establish a Canadian Museum for Human Rights in Winnipeg. The museum would be managed by the federal government.

Given the theme of the museum and public interest in this initiative, it was important to give Canadians a chance to share with the institution's board of directors their viewpoints and advice about the museum's content and programming.

The study involved 26 focus groups held between January 22 and February 1, 2008, including two sessions each in 13 Canadian cities. Participants were recruited from five target groups: teachers and educators; young adults (ages 18 to 25); parents; visible minorities and new Canadians; and Aboriginal Canadians. The focus groups helped the museum's board of directors to:

- Become aware of the viewpoints of stakeholders and the public concerning the content and programming of the new Canadian Museum for Human Rights;
- Understand which aspects of Canada's past and present involvement in human rights and their development should be featured in the museum, and which viewpoints should be included; and
- Learn about Canadians' opinions on concepts such as developing a human rights training centre and education program.

Other Notable Projects

The following are examples of research projects undertaken by some of the other departments and agencies.

Agriculture and Agri-Food Canada, and 22 Other Participating Departments and Agencies

New Technologies and Government of Canada Communications

Blogs, wikis, social networking, YouTube, Facebook, podcasts—these and other social media are proliferating in the new Web 2.0 environment. In 2007–2008, 23 federal departments and agencies participated in a project to assess the potential use of these applications for government communications.

Agriculture and Agri-Food Canada led the project.

The multi-phase project began with focus groups across Canada, involving participants who represent all age groups and undertake varying degrees of Internet use. The findings helped in developing questions for a second phase of research. This consisted of a telephone survey with 1,718 respondents from the general public and an online survey with 2,619 respondents from the Government of Canada's online panel.

The study found that Canadians are aware of most Web 2.0 applications but are less likely to use them than the Internet in general. The exception was the "Web Generation" (ages 16 to 24). People in this age group are twice as likely as those in the older age groups to use social networking sites and to post or download videos or music.

Participants were asked how they would feel if the government started using applications such as YouTube, Facebook or blogs to communicate and interact with Canadians. When asked about the potential benefits, respondents thought that use of these applications would provide convenient and faster access to government information and technologies. They also thought the applications would be effective in reaching younger people and residents of rural or remote areas. When asked if they had any concerns about government using these applications, the largest number of respondents replied "none". Some respondents worried about privacy and security issues, the reliability of content or the possible unfairness of using technologies not accessible to all Canadians—such as those who do not use the Internet.

Respondents were strongly receptive to the idea of: Web sites where government scientists or experts could answer questions from the public; Web sites where Canadians could express their views on different issues; and downloadable audio tours or podcasts of historical and natural sites.

In the end, 87 percent indicated support for federal government investment in Web 2.0 technologies to communicate with and provide services to Canadians. The support was consistent across all segments of the population, including those not using the Internet or Web 2.0 technologies.

The study findings have been widely shared across the government, particularly among managers and professionals in communications and in information management and technology. The results will help in decision-making about whether or not to invest in these emerging applications.

PHASE I

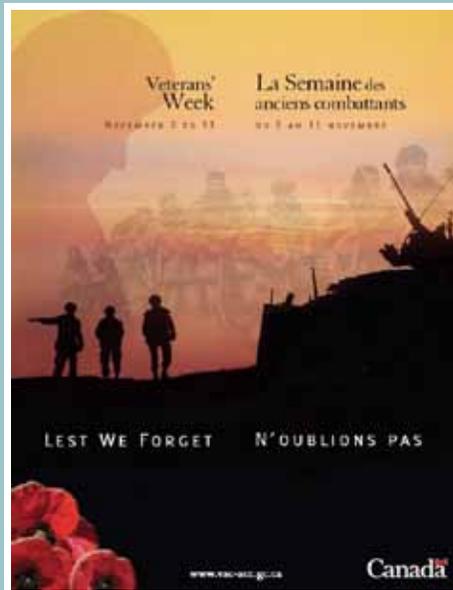
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PHASE II

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-eflagriculture_agri-food/2008/130-07/summary.doc

The Research Found

The November 2007 post-testing study of the “Lest We Forget” vignette found that nearly 6 in 10 (58 %) Canadians participated in Remembrance Day Activities that year. This participation includes personally attending, watching, or listening to any part of a Remembrance Day ceremony.



Veterans Affairs Canada

Evaluating the “Lest We Forget” vignette

Two weeks before Remembrance Day 2007, Veterans Affairs Canada launched an advertising campaign featuring the “Lest We Forget” vignette. It depicted the key contributions of men and women serving in the military to Canada’s past, present and future. In the days after November 11, a survey sought to determine whether the advertising had been successful.

When asked whether they had heard or seen advertising about Canadian Veterans, 6 out of 10 of the respondents said “yes”. Of those recalling the advertisement, 71 percent cited television as the source. Nearly half of the respondents (47 percent) said that the campaign helped generate interest in the wars Canadians have fought and in Remembrance Day. Close to 6 out of 10 (58 percent) had participated in Remembrance Day ceremonies in 2007, and 68 percent of these recollected being exposed to the “Lest We Forget” advertisement. The findings show that the advertising campaign was a success and indicate how it can continue to be effective in the years to come. In view of these positive results, the Department will reduce costs by using a similar vignette with minor revisions for Veterans Week 2008.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tps-gc/por-ef/veterans_affairs_canada/2007/266-07/summary.pdf

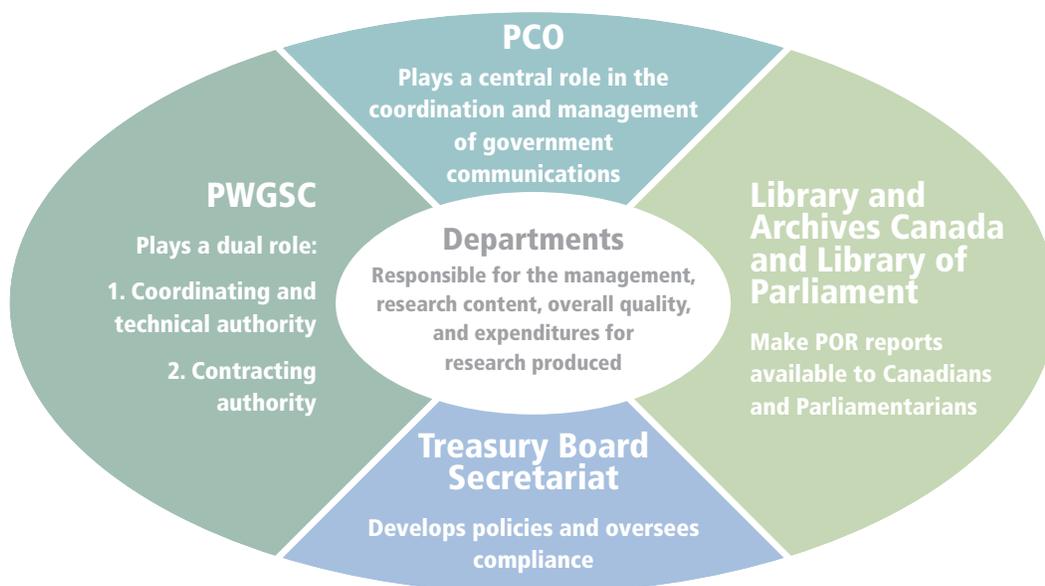


HOW PUBLIC OPINION RESEARCH *is* MANAGED

in the Government of Canada

The Treasury Board *Communications Policy of the Government of Canada* sets out a framework for conducting public opinion research. The framework is mandatory for departments and agencies identified in schedules I, I.1 and II of the *Financial Administration Act*. The policy does not

apply to other institutions, such as Crown corporations and those authorized to undertake their own contracting under sections 41(1) and 41(2) of the Act. This report focuses on the POR activity of institutions covered by the policy.



Departments are at the centre of the overall process. They are responsible for the quality, content and management of their POR activities including acceptance of all deliverables and payment of suppliers.

The **Treasury Board Secretariat** (TBS) advises and supports the Treasury Board and its president in the development, management and evaluation of administrative policy. Under the *Communications Policy of the Government of Canada*, TBS is responsible for developing, evaluating and reviewing government-wide communications policy and advising institutions on the policy interpretation.

Library and Archives Canada (LAC) receives final research reports from departments and agencies and makes them available to the public. It also has a Web site (<http://collectionscanada.ca>) on which it posts executive summaries of research reports and other basic details. This ensures that POR reports are preserved for the use of present and future generations. **Library of Parliament** (LP) makes the reports available to the members of parliament and the press.

The **Privy Council Office** (PCO) has a central role in the coordination and management of government communications.

Public Works and Government Services Canada (PWGSC) works with other federal organizations to serve Canadians efficiently and cost-effectively. The Department is the coordinating and contracting authority for public opinion research within the government. It exercises this authority through two of its directorates, the Public Opinion Research Directorate and the Communications Procurement Directorate, which work closely with each other to provide seamless services to federal organizations.

- The **Communications Procurement Directorate** (CPD) provides a mandatory common service as the government's contracting authority for public opinion research.
- The **Public Opinion Research Directorate** (PORD) provides a mandatory common service for the coordination of public opinion research activities. When federal organizations plan public opinion research projects, they must consult the Directorate from the initial stages. The Directorate helps departments and agencies with their research needs. It also facilitates the procurement of services, shares best practices and research results, and coordinates work across federal organizations.

Expanding the Frontiers of Knowledge

Advisory Panel on Online Public Opinion Survey Quality

PWGSC convened a panel of experts to adapt the relevant standards of the market research industry and to develop benchmarks for surveys. *The Advisory Panel on Online Public Opinion Survey Quality* builds on previous initiatives to develop standards for telephone survey quality.

The standards and guidelines developed for both online and telephone surveys will help ensure greater consistency in the quality of opinion surveys conducted for the Government of Canada. They will be incorporated into future contracts for custom public opinion research studies.

The panel, chaired by PWGSC, consisted of public opinion research experts from the government, the Marketing Research and Intelligence Association (MRIA) and the academic community. The panel conducted its work through in-person, telephone and online discussions. It focused on six areas:

- Pre-field planning, preparation and documentation;
- Sampling;
- Data collection;
- Success rate;
- Data management and processing; and
- Data analysis/reporting and survey documentation.

The results have been shared with departments and the MRIA. They are available to the public at:

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/public_works/2008/263-07/summary.pdf

A Survey of Cellular-Telephone-Only Households—The New Technologies (Web 2.0) and Government of Canada Communications Project

A small but increasing proportion of Canadian households are serviced by cellphones only and are therefore excluded from landline surveys. In this context, PWGSC conducted research to assess the feasibility of surveying cellphone-only households in addition to landline telephone households.

Because virtually no research exists in Canada on this topic, PWGSC wanted to examine cellphone-only households' interest in and potential barriers to participating in cellphone surveys. PWGSC also wanted to determine how survey respondents in cellphone-only households differed from households that respond using landline telephones, in terms of how they prefer to communicate with the Government of Canada.

The results of this study are being used to provide advice to government departments on how to best reach and conduct surveys with cellphone-only households.

The survey report reached the following conclusions:

- Members of cellphone-only households are among a younger demographic, more likely to be male, live in smaller households and report lower levels of household income;
- Telephone surveys conducted by random sampling of landline telephone numbers may no longer be sufficient in the future to capture a broad range of Canadian opinion. They may need to be supplemented by online panel surveys and cellular telephone surveys; and
- People in cellphone-only households are more frequent users of the Internet than persons with conventional landline telephones and are also more likely to use Web 2.0 applications such as social networks and YouTube. Excluding cellphone-only Canadians could affect the results of surveys on the use of technology and possibly many other topics.

With these results, the Government of Canada can better understand how to reach Canadians so that they can respond to research studies. The report will assist public opinion researchers in the government and the marketing research industry across Canada to make strategic choices about Internet, landline telephones and cellphones as data collection tools.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/public_works/2008/300-07/summary.pdf

Advertising Campaign Evaluation Tool

In 2007–2008, PORD, in collaboration with PCO, commissioned a study to review the Advertising Campaign Evaluation Tool (ACET) used to evaluate the impact of the Government of Canada's larger advertising initiatives. The aim of the review was to help determine the extent to which the tool met the government's current evaluation needs, and whether any improvements should be made.

The study involved: 1) a review of literature, including numerous academic and industry publications and government post-campaign evaluation reports; 2) a set of in-depth phone interviews with individuals from government departments and agencies that used the ACET, academics that have expertise related to advertising, representatives of other governments responsible for advertising campaigns, advertising research suppliers, and representatives of private sector firms; 3) testing of both the proposed interviewer-assisted and self-administered versions of the ACET, developed through the first two phases of research; and 4) a review of two pilot tests of the proposed revised tool.

As a result of this study, a new advertising evaluation instrument was produced. The revised version is now shorter and more flexible than the original ACET, saving money on questionnaire design, fieldwork and translation costs. Also, a self-administered version of the instrument has been developed. The self-administered version can be managed via kiosks or the Web and thus has the potential to offer considerable cost savings.

Sharing Results with Canadians

Since 2006, the *Communications Policy of the Government of Canada* has required institutions to deposit their final research reports with Library and Archives Canada and the Library of Parliament within six months of the completion of fieldwork. Institutions must also send a copy to POR. In 2007–2008, 440 projects were completed and the reports were submitted directly to Library and Archives Canada and the Library of Parliament. These reports include studies conducted before and during the 2007–2008 fiscal year.

As part of a new initiative, three departments: Environment Canada, Health Canada and Industry Canada, donated survey data files to the Canadian Opinion Research Archive (CORA). The aim is to maximize their usefulness to Canadian society by making the material available to social scientists across the country. Founded in 1992, CORA is administratively accountable to the School of Policy Studies at Queen's University. It makes commercial and independent surveys available to academics, researchers and journalists. The archive contains hundreds of surveys dating back to the 1970s. Its Web site (www.queensu.ca/cora) carries results from these and more recent Canadian surveys, as well as general information on opinion research. In the same manner that Library and Archives Canada maintains a collection of all POR studies, CORA keeps data files available for the use of present and future generations of Canadian researchers.

Sharing Knowledge within Government

The Community of Practice

The Public Opinion Research Directorate continued to coordinate the federal Community of Practice and participate in other interdepartmental working groups during the past fiscal year. The community includes POR practitioners from 52 departments and agencies. It met regularly to share information and address issues of common concern, such as survey quality and response rates, procurement issues, emerging research techniques, new survey software, joint initiatives and partnerships, and new legislation and policy requirements.

PORD's Knowledge Management Unit seeks to foster education and capacity-building within the Community of Practice. In 2007–2008, the Unit organized learning sessions on various subjects. They included:

- The MRIA's standard courses on qualitative research and on ethical issues and privacy in marketing research. These courses are part of a series being offered to Government of Canada employees to enable them to attain the MRIA's Certified Marketing Research Professional (CMRP) designation;
- A Statistics Canada course on survey non-response bias. This course was designed to implement one of the recommendations of the *Advisory Panel on Telephone Public Opinion Survey Quality*, which was, "Every telephone survey should include an analysis of the potential for non-response bias based on information collected during the normal conduct of the survey" (<http://www.tpsgc-pwgsc.gc.ca/rop-por/rapports-reports/comitephone-panelphone/page-06-eng.html#a3>); and

- Developing a new program entitled Marketing and Business Intelligence Research at Algonquin College in Ottawa. In 2007–2008, the Public Opinion Research Directorate participated in the Advisory Committee for this program (www.algonquincollege.com/prospectivel/fulitime.html), which will be introduced in the fall of 2009. The program will prepare students to write the examination for the Marketing Research and Intelligence Association's Comprehensive Marketing Research Examination. In addition, students will receive training and preparation for careers in the private and public sectors.

The Unit also organized a speakers program. The major themes of the Public Opinion Research Directorate's 2007–2008 speakers program were: using innovative technology to conduct research; conducting research in a diverse society; and maintaining high standards for data from quantitative and qualitative research.

Under the leadership of PORD, the Community of Practice also participated in three informational meetings with an interdepartmental working group to discuss experiences using online survey software. The working group shared knowledge on required and desired features of this software.

Sharing Knowledge with the Marketing Research Profession

In 2003 the Government of Canada, represented by PWGSC, began meeting with the industry as represented by the Marketing Research and Intelligence Association (MRIA). The result has been a growing and productive working relationship that deals with issues of mutual interest. This has included:

- Ensuring that all Government of Canada surveys contracted through POR standing offers and supply arrangements (expired on December 31, 2007) are registered with the MRIA Survey Registration System;
- Consultations on research quality;
- Identification of best practices in research;
- Participation in research studies to give voice to wide-ranging matters of concern to the marketing research profession;
- Development of new courses in public opinion research that are directly relevant to federal government employees; and
- Participation in the government *Advisory Panel on Online Public Opinion Survey Quality*.

Best Practices in Public Opinion Research: Improving Respondent Cooperation for Telephone Surveys

In 2007–2008, PORD began work with MRIA's Field Management Group to develop a Web seminar version of the document *Best Practices in Public Opinion Research: Improving Respondent Cooperation for Telephone Surveys* (<http://www.tpsgc-pwgsc.gc.ca/rop-por/rapports-reports/telephone/tdm-toc-eng.html>). A practical guide to achieving and maintaining high response rates in telephone surveys, the webinar will be broadcast to researchers in the industry and the government in the 2008–2009 fiscal year.

Canada's Marketing Research Industry

The marketing research industry in Canada accounted for \$820 million in research activities in 2007.

The Canada-wide Marketing Research and Intelligence Association counts among its members over 1,860 practitioners, small to large research firms, and private and public sector buyers of research services. Its mission is to promote a positive environment in which the industry can operate effectively and for the benefit of the public. Among its products and services are the following:

- Rules of professional conduct and ethical practice for its members;
- The Certified Marketing Research Professional (CMRP) designation for marketing researchers;
- The Institute for Professional Development, featuring a full slate of courses on all aspects of marketing research; and
- The Survey Registration System, which enables the public to verify the legitimacy of a survey, obtain information about the industry and register a complaint against a member of the association.



For More Information

This report provides an overview of public opinion research activities in the Government of Canada during the fiscal year 2007–2008.

If you have any comments or questions, please contact:

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APPENDICES

Appendix I: Listing of Departments and Agencies Engaged in Public Opinion Research, 2007–2008

Department/Agency	Number of Projects	Contract Value (Thousands of Dollars)
Health Canada ^{1,2}	67	4,799
Human Resources and Social Development Canada ³	47	3,318
Canada Revenue Agency	29	1,968
National Defence	18	1,299
Natural Resources Canada	23	1,157
Environment Canada	27	986
Parks Canada	27	892
Foreign Affairs and International Trade Canada	14	853
Citizenship and Immigration Canada	12	753
Canadian Heritage	12	750
Veterans Affairs Canada	9	726
Public Safety Canada	13	543
Industry Canada	14	527
Transport Canada	15	511
Public Works and Government Services Canada	8	494
Privy Council Office	10	486
Agriculture and Agri-Food Canada	4	418
Indian and Northern Affairs Canada	9	368
Royal Canadian Mounted Police	4	336
Department of Finance Canada	6	326
Canadian Food Inspection Agency	9	321

Department/Agency	Number of Projects	Contract Value (Thousands of Dollars)
Treasury Board of Canada Secretariat	5	311
Department of Justice Canada	6	272
Passport Canada	5	260
Canada Border Services Agency	6	242
Canadian Radio-television and Telecommunications Commission	6	239
Financial Consumer Agency of Canada	3	235
Statistics Canada	4	210
Public Service Human Resources Management Agency of Canada	7	193
Office of the Superintendent of Financial Institutions	4	160
Atlantic Canada Opportunities Agency	5	128
Indian Residential Schools Resolution Canada	1	125
Office of the Chief Electoral Officer	1	113
Public Service Commission	2	112
Correctional Service Canada	3	106
Commission for Public Complaints Against the RCMP	1	63
Library and Archives Canada	2	55
Western Economic Diversification Canada	1	48
Security Intelligence Review Committee	1	25
Canadian Security Intelligence Service	1	25
Public Service Labour Relations Board	1	24
National Research Council Canada	1	16
Office of the Privacy Commissioner of Canada	1	11
Canadian International Development Agency	1	11
Fisheries and Oceans Canada ⁴	2	-57
GRAND TOTAL	446	24,757

¹ Includes the Public Health Agency of Canada.

² Of the 67 projects indicated, Health Canada contracted and commenced 58 projects in the 2007–2008 fiscal year. Of the remainder, four were cancelled and five were projects originated in 2006–2007 and amended in 2007–2008.

³ Human Resources and Social Development Canada was created on February 6, 2006, through the consolidation of the former Department of Human Resources and Skills Development and the Department of Social Development.

⁴ In 2007–2008, contracts were amended to cancel or reduce the value of existing projects. The result was a net decrease.

Appendix II: Listing of Contractors Engaged in Public Opinion Research, 2007–2008

Supplier	Number of Projects	Contract Value (Thousands of Dollars)
Environics Research Group	61	3,870
Ipsos Reid Corporation	62	3,660
EKOS Research Associates	65	3,280
Harris/Decima	38	2,494
Phoenix Strategic Perspectives Inc.	37	2,116
The Strategic Counsel	24	1,617
Créatec +	18	1,585
Corporate Research Associates Inc.	28	1,524
TNS Canadian Facts	21	1,198
Sage Research Corporation	14	771
Phase 5 Consulting Group Inc.	11	552
Western Opinion Research Inc.	8	398
Royal Canadian Legion	1	335
Millward Brown Goldfarb	2	206
Patterson, Langlois Consultants Inc.	3	160
Compas Inc.	1	118
The Antima Group	5	110
Léger Marketing	2	102
Institute for Citizen-Centred Service	2	74
R.A. Malatest & Associates Ltd.	2	44
Vision Research Inc.	2	40
Angus Reid Strategies	3	33
POLLARA Inc.	3	32
Innovative Research Group Inc.	2	29
ACNielsen	2	28
Neo Insight Inc.	1	25
Poirier Communications	1	25
Duxbury, Higgins & Associates Inc.	1	24

Supplier	Number of Projects	Contract Value (Thousands of Dollars)
L*A*M*B* Consulting (Inc)	1	24
HEC Montréal	1	24
DesRosiers Automotive Consultants Inc.	2	22
Banff New Media Institute	1	21
Robert N Hargreaves	1	20
SOM inc.	1	20
Maritz Research	1	19
McAllister Opinion Research	1	16
Prairie Research Associates Inc.	1	16
Intervale Conservation and Heritage Associates Inc.	1	15
GlobeScan	2	14
Alderson-Gill & Associates Consulting Inc.	1	14
L.B.C. Consulting Services	1	13
Delphi Group	1	12
The Praxis Group	1	11
Impact Group	1	11
JupiterResearch	1	10
Itracks Online Data Collection	1	9
Urban & Environmental Management Inc.	1	7
Canadian Safe Boating Council	1	7
Marie-Thérèse Bournival	1	6
DataPath Systems	1	5
Fleishman-Hillard	1	3
CSA Convergence ¹	1	-3
Carleton University, Department of Law ²	1	-8
GRAND TOTAL	446	24,760

^{1,2} In 2007–2008, contracts were amended to cancel or reduce the value of existing projects.
The result was a net decrease.

Appendix III: Thematic Overview of Syndicated Studies, 2007–2008

The Government of Canada subscribed to syndicated studies that dealt with a variety of issues. Below is an overview of these studies by theme.

National Public Opinion Overviews

3SC
(CROP—Centre de recherche sur l'opinion publique/Environics Research Group)

Focus Canada
(Environics Research Group)

Canada This Month
(Innovative Research Group Inc.)

Rethinking Government
(EKOS Research Associates)

The Ipsos Trend Report Canada
(Ipsos Reid Corporation)

The Environmental Monitor
(McAllister Opinion Research)

Canadian Environmental Barometer
(Environics Research Group)

Public Sector Index (PSI)
(Angus Reid Strategies)

Regional Reports

Focus Ontario
(Environics Research Group)

The Atlantic Quarterly
(Corporate Research Associates Inc.)

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

International Issues

Corporate Social Responsibility Monitor
(GlobeScan)

Rethinking North America (2007)
(EKOS Research Associates)

Health Issues

The 2006–2007 Health and Wellness Survey
(ACNielsen)

The Canadian Online Health Consumer Survey
(JupiterResearch)

Tracking Canadians' Reactions to Avian Flu
(Ipsos Reid Corporation)

Environmental Issues

Survey of Sustainability Experts
(GlobeScan)

The Ipsos Analyst: Natural Resources, Environment and Public Opinion
(Ipsos Reid Corporation)

DesRosiers Light Vehicle Study
(DesRosiers Automotive Consultants Inc.)

The Environmental Monitor
(McAllister Opinion Research)

Canadian Environmental Barometer
(Environics Research Group)

The New Environmentalism
(Harris/Decima)

Society

First Nations People On-Reserve
(EKOS Research Associates)

Reconnecting With Youth
(Ipsos Reid Corporation)

Citizen First 5
(Institute for Citizen-Centred Service)

The 3SC Social Values Monitor
(CROP—Environics Research Group)

Aboriginal Issues
(EKOS Research Associates)

Chinese Imports Safety Study
(Harris/Decima)

Public Views Regarding Aboriginal Issues
(Ipsos Reid Corporation)

Focus 50+ Monitor
(Environics Research Group)

High Technology, Innovation and Internet

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

Security

The Security Monitor
(EKOS Research Associates)

Business/Economic Issues

Corporate Connection
(Phoenix Strategic Perspectives Inc.)

*Disappearance of Early Stage and
Start-Up Firms*
(Impact Group)

Marketing/Communications

Agricultural Communications Review
(Ipsos Reid Corporation)

First Nations in the Spotlight
(Innovative Research Group Inc.)

Appendix IV: Standing Offers for 2004–2008

The Communication Procurement Directorate of Public Works and Government Services Canada, in collaboration with the Public Opinion Research Directorate, established a series of contracting tools for POR services through a competitive process. These included supply arrangements that expired in December 2007. The following tools are available until 2009:

Series A—Qualitative Research

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

Series B—Quantitative Research

- Corporate Research Associates Inc.
- Harris/Decima
- EKOS Research Associates
- Environics Research Group
- Fleishman-Hillard
- Ipsos Reid Corporation
- Les Études de Marché Créatec +

- Millward Brown Goldfarb
- Phoenix Strategic Perspectives Inc.
- POLLARA Inc.
- The Strategic Counsel
- TNS Canadian Facts

Series C—Qualitative and/or Quantitative Research

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