



Government
of Canada

Gouvernement
du Canada

18th Annual Report on Government of Canada Public Opinion Research Activities

2018 to 2019 fiscal year



Canada 

18th Annual Report on Government of Canada Public Opinion Research Activities

2018 to 2019 fiscal year

About the report

Public Services and Procurement Canada is responsible for publishing an annual report on Government of Canada public opinion research activities.

This 18th annual report provides information on public opinion research studies contracted during the fiscal year from April 1, 2018 to March 31, 2019 for departments listed under Schedules I, I.1 and II of the *Financial Administration Act*.

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

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The year at a glance

Below is an overview of government-wide public opinion research activities (both custom and syndicated research studies) contracted between April 1, 2018 and March 31, 2019.

Public opinion research activities in the 2018 to 2019 fiscal year



147

Public opinion research studies



35

Departments



25

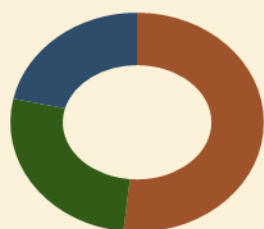
Suppliers



\$15.3
million

In contract value

Breakdown of research methods by number of projects



52% quantitative research

26% qualitative research

22% combined quantitative and qualitative research

The audiences included the general population and the following groups:

agricultural producers	newcomers and immigrants
athletes and national team coaches	people with disabilities
business owners and representatives	public servants
Canada Revenue Agency benefit recipients	seniors
drone users	smokers, vapers and cannabis users
food importers and exporters	tax professionals
Indigenous peoples	teachers
librarians	veterans
low income families	visible minorities
medical and health professionals	youth

Introduction

Public opinion research helps us understand what people think and the challenges they face. It can provide additional insights that otherwise may not have come to light. With this knowledge, the government is better positioned to deliver its programs, policies and services.

Current and precise information is not always available to meet the government's needs. Through public opinion research, we add to our existing knowledge and confirm if findings from previously conducted research are still valid or have changed.

Our 18th annual report provides an overview of Government of Canada public opinion research projects contracted in the 2018 to 2019 fiscal year. The report will give you an idea of the diverse insights generated through this research.

The year in review

In the 2018 to 2019 fiscal year, 147 public opinion research projects were contracted at a total cost of \$15.3 million. This includes syndicated research studies shared among departments¹.

The benefits of public opinion research explain its usage. This research helps open up discussion on important issues and gives Canadians the opportunity to add their input. The information is used to measure the effectiveness of programs, assess service delivery performance, and guide the development of policies or communications strategies. It is all part of the larger effort to strengthen existing services and to deliver on the government's agenda.

The government has taken measures to support equality and growth in Canada, to build an innovative economy and to advance Canadians' shared values. Here are a few examples of public opinion research projects undertaken by the government in 2018 to 2019 in support of these goals.

Helping Canadian businesses start-up, scale-up and export

Innovation, Science and Economic Development Canada (ISED) conducted research for an advertising campaign to increase awareness of the programs and services that support Canadian businesses looking to start-up, scale-up and export. The campaign was designed to drive small and medium-business owners and entrepreneurs to [Innovation.Canada.ca](https://www.innovation.canada.ca) where they can access information on programs and services targeted to their situation.

In addition, the study was designed to help ISED improve the effectiveness of its communications, marketing and outreach efforts in support of mandate to help businesses innovate, thrive and continue to contribute to the success of the Canadian economy.

Reference: Advertising Campaign Innovation for Success (registration number: POR 086-18)

¹ View a year-by-year listing of the number of projects and total contract values for the past 15 fiscal years in the [trends section](#).

Improving services at the Canada Revenue Agency

Canada Revenue Agency tested new versions of the Canada Child Benefit application forms which were designed to be easier to understand and complete. The Agency also engaged in client-centred service design in examining enhancements to its digital services, and meet taxpayers' expectations of its call centre services.

References: Canada Child Benefit Application Form Testing (registration number: POR 036-18), Digital Services Modernization Study (registration number: POR 039-18) and Canada Revenue Agency Call Centre Service Expectations (registration number: POR 009-18)

Exploring challenges to access post-secondary education

To assist policy development aimed at supporting access to post-secondary education, Employment and Social Development Canada held focus group discussions with 16 to 25 year old Canadians. This study identified barriers to inform strategies to provide more equitable access to education opportunities.

Reference: Exploring Challenges to Accessing Post-Secondary Education for At-Risk Youth (registration number: POR 062-18)

Providing guidance on privacy-related issues

The Office of the Privacy Commissioner of Canada, given its mandate, needed to understand the extent to which Canadians are aware of and understand their privacy rights and issues. The survey focused on knowledge and concerns related to privacy and opinions on issues related to privacy and personal information management. The survey also examined privacy issues in 4 priority areas. These included: the economics of personal information; government surveillance; reputation and privacy, and the body as information (i.e. data collected by facial or voice recognition software, genetic results from ancestral research, etc.).

Reference: 2018 Survey of Canadians on Privacy (registration number: POR 055-18)

Addressing the opioid crisis and preparing for the legalization and regulation of cannabis

Health Canada conducted research in support of 2 key Government of Canada priorities: responding to the opioid crisis and the legalization and regulation of cannabis use in Canada.

Opioid campaign creative concepts were pre-tested to determine if they were credible, relevant, memorable, utilized the right tone, and motivated the audience to take personal action. Following the campaign, a separate study evaluated which specific campaign elements the audiences recalled and what attitudinal changes resulted.

The 2018 Canadian Cannabis Survey collected information on cannabis knowledge, attitudes and behaviours among those who use and do not use cannabis. This follow-up survey built on a 2017 baseline survey so that year-to-year changes could be monitored and thus provide insight into the impact of cannabis legalization and regulation in Canada. The 2019 Canadian Cannabis Survey is ongoing.

References: Focus Testing of Opioids Public Education Campaign on Stigma (registration number: POR 034-18), Pre- and Post-Opioid Campaign Evaluation (registration number: POR 045-18) and The Canadian Cannabis Survey 2018 (registration number: POR 006-18)

Did you know?

A small sample of things we learned through listening to Canadians this year.

Consultation on Canada's Large Telecommunications Carriers' Sales Practices

Canadians experienced these practices from telecommunications providers



55% salespeople pushing telecommunications products or services you are not interested in

32% rebate or discount offers where the terms differ from the original information provided

31% salespeople providing false details of telecommunications products or services

Reference: Consultation on Canada's Large Telecommunications Carriers' Sales Practices (registration number: POR 028-18)

Perceptions of Health Risk Behaviours

Perception of risk when each of the following activities are done on a regular basis:

95%

smoke tobacco

82%

use e-cigarette
with nicotine

78%

drink alcohol

72%

smoke cannabis



Respondents chose their answers from a progressive scale of responses: no risk, slight risk, moderate risk, and great risk. This bar graph shows the percentage of respondents who chose either "moderate risk" or "great risk" responses. Smoking tobacco is seen as the riskiest behaviour.

Reference: The Canadian Cannabis Survey 2018 (registration number: POR 006-18)

Opinions on the Ability to Drive a Vehicle under the Influence of Cannabis

Opinions on whether cannabis use impairs one's ability to drive or operate a vehicle:

"Yes" responses from those who used cannabis in the past 12 months and those who did not, broken down by age group

	People who did not use cannabis	People who did use cannabis
16 to 19 years old	85%	57%
20 to 24 years old	82%	54%
25 years and older	87%	63%

Those who do not use cannabis are more likely to think that cannabis use impairs one's ability to drive.



Reference: The Canadian Cannabis Survey 2018 (registration number: POR 006-18)

Views on Autonomous Transportation

Canadians' awareness of and confidence in automated vehicles



Transport Canada undertook a survey to better understand Canadians' awareness and confidence in automated vehicles.



Respondents were asked to rate their level of agreement with the following statement: "I would be comfortable riding in a fully automated vehicle." This data shows the 'strongly agree' and 'somewhat agree' answers combined, compared amongst different age groups. Those aged 16 to 34 years old reported being the most comfortable.

Reference: Canadians' Awareness of and Confidence in Automated Vehicles (registration number: POR 073-18)

Project details are listed in [Appendix II: List of custom research studies by department](#) of this report. Final reports for all completed research studies can be found on the [Library and Archives Canada](#) website.

Custom research studies

There are many reasons why federal departments contract custom research studies. First of all, to learn how their policies, programs and communications efforts are viewed by Canadians. Custom-built research instruments provide a deep understanding of the awareness levels and measure opinions.

Examples of custom research studies

The following briefly describes some of the custom research studies contracted during the 2018 to 2019 fiscal year. A list of all custom research studies is available in the [Appendices](#) of this report.

Survey of Consumers' Comprehension of Home Equity Lines of Credit

The Financial Consumer Agency of Canada surveyed Canadians to measure their awareness and understanding of the key terms and conditions associated with home equity lines of credit. These complicated financial products are not easily understood, especially when combined with traditional mortgages (called “readvanceable mortgages”).

Although several million Canadians have home equity lines of credit, most survey respondents (74%) scored less than 50% on their knowledge of their terms and conditions.

More than 25% of respondents routinely made interest-only payments and 19% of respondents borrowed more than intended.

Renovations, debt consolidation, vehicle purchases and daily expenses were the main uses of home equity lines of credit.

Reference: [2018 Survey of Consumers' Comprehension of Home Equity Lines of Credit](#) (registration number: POR 004-18)

Survey of Internet Users Regarding Cyber Security

In 2018, the Government of Canada introduced a new National Cyber Security Strategy to protect Canadians from cyber threats. At the same time, Public Safety Canada put together a cyber security research study to learn more about public awareness of malicious cyber activity. The research project assessed the “Get Cyber Safe” awareness campaign, and identified motivators and barriers to behaviour change. It also looked at the best ways of communicating how to stay safe online. Finally, it examined public expectations of the roles of governments and non-governmental organizations in cyber security.

Online Canadians spend an average of 5 hours online each day, and 98% have an email account.

Half of Canadian Internet users say they are very concerned about having their personal information obtained and used without permission. The vast majority take measures to protect their devices and personal information online. These measures include:

- downloading files only from trusted sources
- keeping anti-virus software up-to-date
- locking devices with password protection
- password-protecting their Wi-Fi connections
- using caution with unknown sources

Still, nearly half of Canadians report using the same password for multiple accounts, and 4 in 10 allow their browsers to store their passwords.

Canadians have been proactively looking for information about online threats. Examples of information sought: protecting devices with anti-virus software (48%), how to secure home networks (38%), and how to tell if an email is a scam (38%). Two-thirds of Canadians are confident they can protect themselves online so long as they have the basic information on steps to take.

Many parents feel they have the information needed to protect their children online. That being said, 4 in 10 also agree that they cannot keep up with the apps, games, and other technologies that young people are using.

Reference: [Survey of Internet Users Regarding Cyber Security](#) (registration number: POR 032-18)

Elections Canada qualitative research re. ballot redesign

Elections Canada had been considering several slight modifications that would make election ballots easier to use. To support the design of a new ballot, Elections Canada held 6 focus groups and 11 in-person, in-depth interviews with eligible electors. Participants were taken from the general public, but also included persons with physical, visual and cognitive disabilities.

The qualitative research uncovered some preferences for characteristics of ballots.

Almost everyone agreed that a somewhat larger size ballot was easier to read and use. A strong preference was expressed for dashes rather than dots. The previous ballot had rows of dots on the blank spaces around the candidates' names and party affiliations. Participants liked candidate surnames put in a uniform upper case text. They also stressed the importance of shading and sharp contrast to make the names of the candidates and the parties clear and distinct and easy to read.

Reference: [Ballot Redesign Focus Groups](#) (registration number: POR 001-18)

Survey of Consumer Perceptions of Food Products

Agriculture and Agri-Food Canada regularly surveys Canadians to determine their attitudes and opinions towards food.

In 2019, Wave 5 of their Survey of Consumer Perceptions of Food was completed. The survey measured Canadians' perceptions on a variety of topics, such as: food quality, attributes they look for when making food purchases and where they get their information about food and nutrition.

The survey showed that respondents most often seek food items that they consider to be best value for money spent (84%) and based on the food items nutritional value (76%).

Many respondents are increasingly considering the origin of the food, as opposed to convenience when making food choices. For example, 69% sought items labeled as “Product of Canada” or “Made in Canada”, 63% sought items that are locally produced and 57% sought country of origin; this is up from 52%, 48% and 38% respectively in 2014.

In contrast, approximately half (49%) noted they make food choices based on convenience, a slight decrease from 2014 (50%).

Reference: Agriculture and Agri-Food Canada Survey of Consumer Perceptions of Food: Wave 5 (2018 to 2019) (registration number: POR 066-18)

Volume of custom research studies by department

A total of 35 departments contracted custom public opinion research studies between April 1, 2018 and March 31, 2019.

Note

The amounts reported represent the contract value. This includes amendments to increase or reduce the contract value during the 2018 to 2019 fiscal year. The negative figures (written with a minus sign in front) indicate that these contracts were issued in a previous fiscal year, but were amended downward in the following reporting year.

Table 1: Volume of custom research studies by department in 2018 to 2019

Department	Number of research studies	Contract value
Agriculture and Agri-Food Canada	3	\$411,487.91
Atlantic Canada Opportunities Agency	1	\$3,898.50
Canada Border Services Agency	1	\$122,328.15
Canada Revenue Agency	16	\$1,155,492.70
Canada School of Public Service	1	-\$15,683.44
Canadian Food Inspection Agency	1	\$112,858.09
Canadian Heritage	1	\$69,938.98
Canadian Radio-television and Telecommunications Commission	2	\$288,025.33
Canadian Transportation Agency	2	\$9,203.85
Department for Women and Gender Equality	2	\$318,853.23
Department of Finance Canada	4	\$530,865.01
Department of Justice Canada	1	\$59,955.88
Employment and Social Development Canada	6	\$662,254.27
Environment and Climate Change Canada	1	\$77,519.70
Financial Consumer Agency of Canada	6	\$974,465.43
Fisheries and Oceans Canada	1	\$99,934.26
Global Affairs Canada	3	\$312,415.86
Health Canada	27	\$3,739,743.73

Immigration, Refugees and Citizenship Canada	8	\$565,619.49
Innovation, Science and Economic Development Canada	3	\$568,270.67
Library and Archives Canada	1	\$59,332.91
National Defence	5	\$208,517.50
Natural Resources Canada	4	\$329,386.91
Office of the Chief Electoral Officer	6	\$547,568.23
Office of the Superintendent of Financial Institutions Canada	3	\$187,683.62
Offices of the Information and Privacy Commissioners of Canada	1	\$66,185.51
Parks Canada	3	\$163,165.45
Privy Council Office	4	\$999,154.59
Public Safety Canada	5	\$333,413.28
Public Services and Procurement Canada	2	\$64,534.30
Royal Canadian Mounted Police	1	\$74,947.25
Statistics Canada	1	\$17,119.50
Transport Canada	3	\$231,966.85
Treasury Board of Canada Secretariat	1	\$471,205.99
Veterans Affairs Canada	7	\$540,660.59
Total	137	\$14,362,290.08

Volume of custom research studies by supplier

In total, the government awarded contracts for custom public opinion research services to 22 research firms. These firms delivered various research services, ranging from survey data collection to full qualitative and/or quantitative research services (research design, data collection, analysis and reporting).

Note

The amounts reported represent the contract value. This includes amendments to increase or reduce the contract value during the 2018 to 2019 fiscal year.

Table 2: Volume of custom research studies by supplier in 2018 to 2019

Supplier	Number of research studies	Contract value
Advanis Jolicoeur	3	\$970,665.99
Advitek Inc.	1	\$1,322.10
Community Development Council Durham	1	\$6,458.23
Corporate Research Associates Inc.	12	\$1,109,382.36
Ekos Research Associates Inc.	21	\$1,480,894.88
Elemental Data Collection Inc.	2	\$502,375.40
Environics Research Group Limited	21	\$2,993,167.79
Forum Research Inc.	1	\$49,983.45
Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel	3	\$180,348.00
Ipsos-Reid Corporation	8	\$1,282,643.79
Kantar TNS Inc.	6	\$460,871.95
Léger Marketing	7	\$576,427.60
London School of Economics and Political Science	1	\$22,600.00
Parkdale Community Legal Services	1	\$4,830.75
Peel Newcomer Strategy Group	1	\$4,520.00
Phoenix SPI	20	\$1,893,125.69

Pollara	2	\$184,077.74
Quorus Consulting Group Inc.	7	\$807,188.27
RIWI Corp.	1	\$24,814.80
Sage Research Corporation	4	\$273,664.53
St Stephen's Community House	1	\$2,346.73
The Earnscliffe Strategy Group Inc.	13	\$1,530,580.03
Total	137	\$14,362,290.08

Syndicated research studies

The Government of Canada purchased subscriptions to 10 syndicated public opinion research studies in 2018 to 2019.

Syndicated studies are an economical way of obtaining information because research costs are shared among subscribers. These studies, covering a variety of broad issues or themes, are developed by research firms that own the data.

These subscriptions allowed federal departments to access the collected information while the intellectual property rights remained with the research firm.

Subscriptions to these syndicated research studies were purchased by the Government of Canada and made available government-wide.

Table 3: Volume of syndicated research studies in 2018 to 2019

Syndicated research study title	Supplier	Contract value
Atlantic Quarterly	Corporate Research Associates Inc.	\$12,882.00
Canadian Millennials Report	Abacus Data Inc.	\$68,478.00
Canadian Youth Reconciliation Barometer	Environics Research Group Limited	\$67,800.00
Client Journey through the Criminal Justice System (Portrait Cards)	InWithForward Canada Inc.	\$25,000.00
Indigenous Insights (Vol. 2)	The Earncliffe Strategy Group Inc.	\$220,350.00
Indigenous Insights (Vol. 3)	The Earncliffe Strategy Group Inc.	\$220,350.00
North of 60° and Remote Community Monitor	Environics Research Group Limited	\$153,680.00
Panorama	CROP Inc.	\$22,000.00
The Public Lens: Acceptance and Intolerance in Canada	Pollara	\$62,150.00
The Public Lens: Cannabis in Canada	Pollara	\$62,150.00
Total		\$914,840.00

Trends

The volume of research fluctuates from year to year depending on the government's needs. The tables represent a summary of past research studies and contract values.

Table 4: Number of research studies and contract values by fiscal year

Period	Number of research studies	Contract value (in millions of dollars)
April 1, 2018 to March 31, 2019	147	\$15.3
April 1, 2017 to March 31, 2018	124	\$11.9
April 1, 2016 to March 31, 2017	129	\$12.5
April 1, 2015 to March 31, 2016	51	\$3.8
April 1, 2014 to March 31, 2015	54	\$4.1
April 1, 2013 to March 31, 2014	81	\$4.9
April 1, 2012 to March 31, 2013	72	\$4.3
April 1, 2011 to March 31, 2012	100	\$6.5
April 1, 2010 to March 31, 2011	136	\$7.9
April 1, 2009 to March 31, 2010	148	\$8.3
April 1, 2008 to March 31, 2009	131	\$8.1
April 1, 2007 to March 31, 2008	446	\$24.8
April 1, 2006 to March 31, 2007	562	\$31.4
April 1, 2005 to March 31, 2006	516	\$26.8
April 1, 2004 to March 31, 2005	621	\$29.0

Table 5: Procurement methods for research studies in 2018 to 2019

Procurement methods	Number of research studies	Contract value	% Contract value
Standing offers	125	\$13,271,795.73	86.9%
Public tenders (buyandsell.gc.ca)	3	\$994,752.84	6.5%
Subscriptions to syndicated studies	10	\$914,840.00	6.0%
Sole-source contracts under \$25K	9	\$95,741.51	0.6%
Total	147	\$15,277,130.08	100%

Appendices

In this section

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- Appendix II: List of custom research studies by department
- Appendix III: Standing offers for public opinion research services
- Appendix IV: Key public opinion research-related laws, regulations and policies

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

Roles and Responsibilities of Stakeholders in Public Opinion Research Activities

Departments



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

Treasury Board of Canada Secretariat



sets policies and oversees compliance

Privy Council Office



performs a central role in the leadership and strategic direction

Public Services and Procurement Canada



provides research advice and is the contracting authority

Library and Archives Canada



makes public opinion research available to Canadians

Suppliers



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

Appendix II: List of custom research studies by department

Below is a list of custom research studies contracted by department.

A registration number is assigned to each study, which can then be used to find the report in the [public opinion research reports](#) collection. Please note that some of these studies may have not been completed at the time of publishing this report but will be posted within 6 months after the completion of data collection.

Note

The amounts reported represent the contract value. This includes amendments to increase or reduce the contract value during the 2018 to 2019 fiscal year. The negative figures (written with a minus sign in front) indicate that these contracts were issued in a previous fiscal year, but were amended downward in the following reporting year.

Table 6: List of custom public opinion research studies contracted in 2018 to 2019

Research study title by department	Registration number	Supplier	Contract value
Agriculture and Agri-Food Canada			
Agriculture and Agri-Food Canada Survey of Consumer Perceptions of Food: Wave 5 (2018 to 2019)	POR 066-18	Ekos Research Associates Inc.	\$79,965.02
Agriculture and Agri-Food Canada Survey of Food and Beverage Processors (2018 to 2019)	POR 053-18	Phoenix SPI	\$82,630.12
Strategic Issues Survey and Focus Groups (2018 to 2019)	POR 031-18	The Earncliffe Strategy Group Inc.	\$248,892.77
Atlantic Canada Opportunities Agency			
Summer 2018 Atlantic Quarterly Client Commissioned Questions	POR 018-18	Corporate Research Associates Inc.	\$3,898.50
Canada Border Services Agency			
Intranet and Internet Public Opinion Research	POR 106-18	Léger Marketing	\$122,328.15

Canada Revenue Agency			
2018 Annual Corporate Research	POR 052-18	Environics Research Group Limited	\$174,410.30
2018 to 2019 Benefits and Credits Campaign Testing	POR 050-18	Ekos Research Associates Inc.	\$44,522.00
2018 to 2019 Canada Revenue Agency Benefits and Credits Campaign Concept Testing	POR 033-18	Ekos Research Associates Inc.	\$83,631.30
2018 to 2019 Canada Revenue Agency Tax Evasion and Aggressive Tax Avoidance Advertising Campaign (Concept Testing)	POR 024-18	Sage Research Corporation	\$54,279.55
Canada Child Benefit Application Form Testing	POR 036-18	Corporate Research Associates Inc.	\$64,929.80
Canada Child Benefit Program: Satisfaction Survey	POR 049-18	Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel	\$41,810.00
Canada Revenue Agency Call Centre Service Expectations	POR 009-18	Kantar TNS Inc.	\$54,910.03
Climate Action Incentive Advertising Campaign: Advertising Campaign Evaluation Tool	POR 116-18	Corporate Research Associates Inc.	\$38,782.73
Climate Action Incentive Advertising Campaign: Concept Testing	POR 096-18	Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel	\$39,194.05
Digital Services Modernization Study	POR 039-18	Phoenix SPI	\$72,197.96
Enhancing Digital Services for Corporations: Qualitative Research	POR 071-18	Quorus Consulting Group Inc.	\$64,353.78
Leads Program Qualitative Research	POR 097-18	Sage Research Corporation	\$70,886.03
Non-Filer's Benefit Letter Initiative: Qualitative Research	POR 035-18	The Earncliffe Strategy Group Inc.	\$68,935.65
Paper Filed T2 Corporation Income Tax Returns	POR 090-18	Forum Research Inc.	\$49,983.45
Taxpayer Attitudinal Segmentation Research 2018 to 2019	POR 079-18	Phoenix SPI	\$159,253.05
Tax Scheme Promoters	POR 100-18	The Earncliffe Strategy Group Inc.	\$73,413.02

Canada School of Public Service			
Client Perspective Research 2018	POR 079-17	Ekos Research Associates Inc.	-\$15,683.44
Canadian Food Inspection Agency			
Public Opinion Research With Food Businesses to Support Compliance With Food Safety Regulations: 2018 to 2019	POR 029-18	Quorus Consulting Group Inc.	\$112,858.09
Canadian Heritage			
2018 Status of High Performance Athletes in Canada Survey	POR 091-18	Ekos Research Associates Inc.	\$69,938.98
Canadian Radio-television and Telecommunications Commission			
Consultation on Canada's Large Telecommunications Carriers' Sales Practices	POR 028-18	Ipsos-Reid Corporation	\$183,003.50
Wireless Code Public Opinion Research: Spring 2019	POR 084-18	Kantar TNS Inc.	\$105,021.83
Canadian Transportation Agency			
Air Passenger Protection Regulations: Analysis and Reporting Contract	POR 046-18	Ekos Research Associates Inc.	\$7,881.75
Airport Surveys Consultation on Consumer Protection for Air Travellers	POR 053-17	Advitek Inc.	\$1,322.10
Department for Women and Gender Equality			
Gender Equality and Attitudes Study	POR 070-18	Environics Research Group Limited	\$249,291.56
Gender Equality and #MeToo in Canada Survey	POR 080-18	The Earncliffe Strategy Group Inc.	\$69,561.67
Department of Finance Canada			
Finance Canada: Focus Groups on Open Banking	POR 117-18	Pollara	\$88,248.03
Focus Groups on the Economy (Qualitative) through Perception Analyzer	POR 134-18	Corporate Research Associates Inc.	\$103,776.38
Survey and Focus Groups on the Economy: Fall 2018	POR 027-18	Quorus Consulting Group Inc.	\$170,422.01
Survey and Focus Groups on the Economy: Winter 2019	POR 099-18	Environics Research Group Limited	\$168,418.59

Department of Justice Canada			
National Justice Survey 2018	POR 061-18	Ekos Research Associates Inc.	\$59,955.88
Employment and Social Development Canada			
2017 to 2018 Regular Collection of Client Experience Data: Pilot Phase	POR 107-17	Kantar TNS Inc.	\$1,073.50
2018 to 2019 Advertising Public Opinion Research: Education and Skills Campaign	POR 020-18	Corporate Research Associates Inc.	\$85,541.00
2018 to 2019 Advertising Public Opinion Research: Services for Seniors	POR 040-18	Ekos Research Associates Inc.	\$117,458.42
2018 to 2019 Client Experience Measurement	POR 101-18	Ipsos-Reid Corporation	\$249,634.20
Exploring Challenges to Accessing Post-Secondary Education for At-Risk Youth	POR 062-18	Phoenix SPI	\$79,987.05
Federal Accessibility Legislation Baseline Survey	POR 012-18	Quorus Consulting Group Inc.	\$128,560.10
Environment and Climate Change Canada			
Nature Legacy Public Opinion Research: Advertising Campaign, Evaluation Survey and Focus Group Testing	POR 098-18	Quorus Consulting Group Inc.	\$77,519.70
Financial Consumer Agency of Canada			
2018 Survey of Consumers' Comprehension of Home Equity Lines of Credit	POR 004-18	Ipsos-Reid Corporation	\$48,324.45
2019 Canadian Financial Capability Survey	POR 060-18	Ekos Research Associates Inc.	\$247,439.09
Consumer Awareness and Interest in Longer-Term Mortgages Survey	POR 135-18	Ipsos-Reid Corporation	\$162,640.90
Financial Consumer Agency of Canada Survey of Consumers about Complaint Handling in Banking	POR 124-18	Environics Research Group Limited	\$233,843.78
Surveying Consumers about their Financial Rights and Responsibilities	POR 123-18	Environics Research Group Limited	\$79,576.63
Survey on Banking of Canadian Seniors and Non-Seniors	POR 114-18	Phoenix SPI	\$202,640.58
Fisheries and Oceans Canada			
Aquaculture in Canada 2018 Survey	POR 082-18	Ekos Research Associates Inc.	\$99,934.26

Global Affairs Canada			
2018 Trade Commissioner Service Comprehensive Client Survey	POR 092-18	Ekos Research Associates Inc.	\$91,392.71
Image of Canada and Comprehensive Economic Trade Agreement by the General Public in France	POR 103-18	Léger Marketing	\$88,557.20
Survey and Focus Groups on Free Trade Agreements	POR 115-18	Phoenix SPI	\$132,465.95
Health Canada			
Assessment of Health Canada's Communications to External Stakeholders on Marketed Health Products	POR 136-18	Pollara	\$95,829.71
Baseline and Post-Campaign for the Cannabis Coming Into Force Campaign: Advertising Campaign Evaluation Tool	POR 044-18	Ipsos-Reid Corporation	\$69,718.40
Break It Off: Tobacco Cessation Creative Concepts Testing	POR 013-18	Phoenix SPI	\$59,923.90
Evaluating Various Components of Employee Assistance Services: 2018 to 2019	POR 057-18	Elemental Data Collection Inc.	\$24,950.40
Exploratory Research on Smoking Cessation	POR 054-18	Phoenix SPI	\$145,411.79
Focus Testing Health Warning Messages for Edible Cannabis Products, and Cannabis Consumer Information Sheet	POR 109-18	The Earncliffe Strategy Group Inc.	\$117,037.60
Focus Testing of Opioids Public Education Campaign on Stigma	POR 034-18	The Earncliffe Strategy Group Inc.	\$74,992.45
Follow-up Survey and Qualitative Research on Opioid Awareness, Knowledge and Behaviours for Public Education	POR 137-18	The Earncliffe Strategy Group Inc.	\$198,115.86
Healthy Eating Strategy Focus Groups for Canada Food Guide's Online Presence	POR 023-18	The Earncliffe Strategy Group Inc.	\$234,102.10
Marketing to Kids: Baseline Survey on Recall of Food and Beverage Marketing	POR 108-18	Gregg, Kelly, Sullivan and Woolstencroft: The Strategic Counsel	\$99,343.95
Pre- and Post-Opioid Campaign Evaluation	POR 045-18	Ipsos-Reid Corporation	\$74,750.92
Public Opinion Research on Noticeability of Health Information Messages and Effectiveness of Health Warnings for Tobacco Labelling	POR 058-18	EnviroNics Research Group Limited	\$110,925.04

Qualitative and Quantitative Research on Perceptions of Nicotine	POR 067-18	The Earnscliffe Strategy Group Inc.	\$238,145.61
Qualitative Testing of Revised Health Warnings for Cigarette Packages and on Cigarettes: 2019	POR 126-18	Corporate Research Associates Inc.	\$228,966.25
Seasonal Influenza Vaccination Coverage: Survey 2018 to 2019	POR 065-18	Léger Marketing	\$168,415.20
Smokers and Recent Quitters' Awareness and Perceptions of Options to Minimize Harms from Tobacco Products	POR 093-18	Phoenix SPI	\$146,648.24
Smoking Behaviour Journey Map	POR 119-18	Environics Research Group Limited	\$99,435.71
Study on Cannabis: Health Warning Messages Focus Groups	POR 002-18	The Earnscliffe Strategy Group Inc.	\$113,971.80
Testing of Relative Risk Statements for Vaping Products	POR 014-18	Corporate Research Associates Inc.	\$104,214.25
The Canadian Cannabis Survey 2018	POR 006-18	Advanis Jolicoeur	\$249,730.00
The Canadian Cannabis Survey 2019	POR 130-18	Advanis Jolicoeur	\$249,730.00
Travellers' Risk Perceptions, Values and Preferences	POR 110-18	Kantar TNS Inc.	\$79,422.26
Understanding and Awareness of Sport-Related Concussions : Focus on Youth	POR 072-18	Kantar TNS Inc.	\$144,324.70
Vaccine Acceptability Factors for the General Public and Health Care Professionals in Canada	POR 138-18	Environics Research Group Limited	\$185,489.50
Vapers' Panel Survey to Measure Attitudes and Behaviours Regarding Vaping Products	POR 083-18	Environics Research Group Limited	\$149,432.56
Vapers' Panel Survey to Measure Attitudes and Behaviours Regarding Vaping Products	POR 141-18	Environics Research Group Limited	\$148,172.38
Vaping Prevention and Protection Concepts Testing	POR 037-18	Corporate Research Associates Inc.	\$128,543.15
Immigration, Refugees and Citizenship Canada			
2018 to 2019 Annual Tracking Study	POR 026-18	Quorus Consulting Group Inc.	\$124,468.14
2018 to 2019 Annual Tracking Study: Winter	POR 094-18	Ipsos-Reid Corporation	\$249,822.69
2018 to 2019 International Experience Canada Youth Study	POR 133-18	Environics Research Group Limited	\$122,311.65

Barriers to and Motivations for Citizenship for Permanent Residents: Part 1	POR 128-18	Parkdale Community Legal Services	\$4,830.75
Barriers to and Motivations for Citizenship for Permanent Residents: Part 2	POR 129-18	Peel Newcomer Strategy Group	\$4,520.00
Barriers to and Motivations for Citizenship for Permanent Residents: Part 3	POR 131-18	Community Development Council Durham	\$6,458.23
Barriers to and Motivations for Citizenship for Permanent Residents: Part 4	POR 140-18	St Stephen's Community House	\$2,346.73
Official Language Learning Survey	POR 120-18	Léger Marketing	\$50,861.30
Innovation, Science and Economic Development Canada			
Advertising Campaign Innovation for Success	POR 086-18	Ipsos-Reid Corporation	\$244,748.73
Competition Bureau Market Study: Competition in Broadband Services	POR 085-18	EnviroNics Research Group Limited	\$194,515.49
Survey of Small and Medium Businesses and of Consumer Attitudes and Expectations towards Cybersecurity Certification	POR 132-18	Quorus Consulting Group Inc.	\$129,006.45
Library and Archives Canada			
Report on Program Statistics for Toronto Dominion Summer Reading Club 2018	POR 043-18	EnviroNics Research Group Limited	\$59,332.91
National Defence			
Formative Research for Recruitment, Marketing and Advertising 2019	POR 113-18	The Earnscliffe Strategy Group Inc.	\$74,263.60
Qualitative Advertising Pretest: Summer 2018	POR 016-18	Léger Marketing	\$72,849.65
Recruitment Advertising Success Check 2018	POR 069-18	Corporate Research Associates Inc.	\$38,657.30
Testing Recall of Recruitment Advertising: 2018 to 2019 Campaign	POR 118-18	Corporate Research Associates Inc.	\$18,571.55
Views of the Canadian Armed Forces: 2018 Tracking Study	POR 076-17	The Earnscliffe Strategy Group Inc.	\$4,175.40
Natural Resources Canada			
Energy Star and EnerGuide Labelling Awareness Survey 2018	POR 051-18	Phoenix SPI	\$85,509.36
Public Opinion on Natural Resources in a Low-Carbon Economy	POR 089-18	EnviroNics Research Group Limited	\$168,115.75

Public Opinion Research on Natural Resources Issues: 2018	POR 057-17	Phoenix SPI	-\$357.83
SmartWay Freight Industry Survey	POR 048-18	Kantar TNS Inc.	\$76,119.63
Office of the Chief Electoral Officer			
Ballot Redesign Focus Groups	POR 001-18	Phoenix SPI	\$78,831.06
Designing the List of Pieces of Identification and the Voter Information Card	POR 047-18	EnviroNics Research Group Limited	\$111,644.00
Survey of Electors following the By-election in Leeds-Grenville-Thousand Islands and Rideau Lakes (ON)	POR 081-18	Phoenix SPI	\$35,627.88
Survey of Electors following the February 2019 By-election	POR 127-18	Phoenix SPI	\$69,986.50
Survey of Electors following the June 18, 2018 Federal By-election in Chicoutimi-Le Fjord	POR 011-18	Phoenix SPI	\$31,659.89
Voter Information Campaign: Pre-event Testing of Communication Products	POR 007-18	EnviroNics Research Group Limited	\$219,818.90
Office of the Superintendent of Financial Institutions Canada			
Deposit-Taking Institutions Sector Consultation	POR 025-18	Sage Research Corporation	\$70,246.45
Financial Institutions Survey 2018 to 2019	POR 021-18	Phoenix SPI	\$45,537.87
Office of the Superintendent of Financial Institutions Employee Survey 2018	POR 019-18	EnviroNics Research Group Limited	\$71,899.30
Offices of the Information and Privacy Commissioners of Canada			
2018 Survey of Canadians on Privacy	POR 055-18	Phoenix SPI	\$66,185.51
Parks Canada			
Assessment of Parks Canada's 2018 Advertising Campaign	POR 038-17	Ekos Research Associates Inc.	-\$21,629.33
Parks Canada Awareness Tracking Study 2018 to 2019	POR 003-18	Ekos Research Associates Inc.	\$135,571.75
Pre and Post Evaluations of Parks Canada's 2019 National Tourism Advertising Campaign	POR 088-18	Ekos Research Associates Inc.	\$49,223.03
Privy Council Office			
Continuous Tracking of Canadians' Views: Quantitative Survey	POR 122-18	Elemental Data Collection Inc.	\$477,425.00
Focus Groups: Spring 2019	POR 139-18	Phoenix SPI	\$249,535.19

Pilot Study Involving International Public Opinion Research in Mexico	POR 111-18	RIWI Corp.	\$24,814.80
Privy Council Office Focus Groups: Winter 2019	POR 074-18	Corporate Research Associates Inc.	\$247,379.60
Public Safety Canada			
Cyberbullying Public Awareness Research	POR 125-18	Environics Research Group Limited	\$81,979.24
Drug Impaired Driving Awareness Campaign 2019 to 2020 Concept Testing	POR 107-18	Ekos Research Associates Inc.	\$56,192.64
Measuring Public Attitudes Towards the Police	POR 005-18	London School of Economics and Political Science	\$22,600.00
Post Testing of the Drug-Impaired Driving Advertising Campaign	POR 030-18	Ekos Research Associates Inc.	\$49,657.85
Survey of Internet Users Regarding Cyber Security	POR 032-18	Ekos Research Associates Inc.	\$122,983.55
Public Services and Procurement Canada			
Communication Procurement Directorate Annual Client Satisfaction Survey	POR 042-18	Environics Research Group Limited	\$24,984.30
Qualitative Assessment of the Pay Insight Concept and Track myCASE Update	POR 038-18	Léger Marketing	\$39,550.00
Royal Canadian Mounted Police			
Survey of Canadians' View of Royal Canadian Mounted Police Services	POR 064-18	Ekos Research Associates Inc.	\$74,947.25
Statistics Canada			
Survey of Canadians' Views on Statistics Canada	POR 010-18	Ekos Research Associates Inc.	\$17,119.50
Transport Canada			
Canadian Drone Users Research	POR 121-18	Léger Marketing	\$33,866.10
Canadians' Awareness of and Confidence in Automated Vehicles	POR 073-18	Environics Research Group Limited	\$119,848.25
Focus Testing of Best Practices in Rental Boating Safety Communications	POR 022-18	Sage Research Corporation	\$78,252.50
Treasury Board of Canada Secretariat			
Treasury Board of Canada Secretariat Public Service Employee Survey: Wave 1 (2018) and Wave 2 (2019)	POR 089-17	Advanis Jolicoeur	\$471,205.99

Veterans Affairs Canada			
Advertising Post-Testing of the 2018 Remembrance Campaign	POR 059-18	Ekos Research Associates Inc.	\$35,932.31
Assessing the Effectiveness of Communications Products for Veterans 2018	POR 068-18	Environics Research Group Limited	\$219,721.95
Attitudes Towards Remembrance and Veterans' Week 2018 Survey of Canadians	POR 041-18	Phoenix SPI	\$49,478.26
Client Experiences with Veterans Affairs Canada Rehabilitation Program and Case Management Services	POR 063-18	Corporate Research Associates Inc.	\$46,121.85
My VAC Account	POR 095-18	Phoenix SPI	\$99,973.36
Pre-testing of the Pension for Life Creative Concepts	POR 104-18	Ekos Research Associates Inc.	\$74,460.36
Spouses Supporting Transition	POR 056-18	The Earnscliffe Strategy Group Inc.	\$14,972.50

Appendix III: Standing offers for public opinion research services

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

On October 1, 2015, Public Services and Procurement Canada authorized standing offers for public opinion research services. This included the completion of a multi-phased process involving consultation, open tendering process and bid evaluations. The standing offers cover the following services:

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

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

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

These standing offers are in effect until September 30, 2019, with the possibility of extension periods up until the year 2021.

Fieldwork and data tabulation for online surveys (series A)

Departments may use this standing offer for online surveys for the following services: programming, pretesting, collecting data, tabulating data and providing pretest and end results.

Standing offer holders for series A:

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

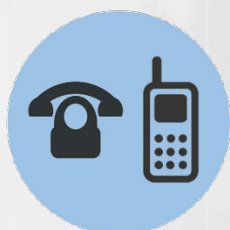


Fieldwork and data tabulation for telephone surveys (series B)

Departments may use this standing offer for telephone surveys for the following services: programming, pretesting, interviewing, tabulating data and providing pretest and end results.

Standing offer holders for series B:

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



Qualitative research (series C)

Departments may use this standing offer for qualitative research for the following services: developing the research design, data collection, analyzing, presenting and reporting the results.

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

Standing offer holders for series C:

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



Quantitative research (series D)

Departments may use this standing offer for quantitative research for the following services: developing the research design, data collection, analyzing, presenting and reporting the results.

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

Standing offer holders for series D:

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



Qualitative and Quantitative research (series E)

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

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

Standing offer holders for series E:

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



Appendix IV: Key public opinion research-related laws, regulations and policies

Laws and regulations

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

Policies

- [*Common Services Policy*](#) identifies Public Services and Procurement Canada as a mandatory common service organization for the coordination and contracting of public opinion research
- [*Contracting Policy*](#) requires departments to notify Public Services and Procurement Canada when a public opinion research project may require a contract
- [*Policy on Communications and Federal Identity*](#) gives context and rules for how the Government of Canada enables communication with the public about policies, programs, services and initiatives, including the administration of the Government of Canada official symbols

Directive and mandatory procedures

- [*Directive on the Management of Communications*](#) provides rules for managing and coordinating communications, including procedures for advertising, public opinion research, social media and web communications
- [*Appendix C: Mandatory Procedures for Public Opinion Research*](#) provides procedural rules for planning, contracting and reporting public opinion research activities

Contact information

This report provides an overview of the Government of Canada's public opinion research activities contracted between April 1, 2018 and March 31, 2019.

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

If you have any comments or questions, please contact:

Public Opinion Research Directorate

Public Services and Procurement Canada

5-350 Albert St

Ottawa ON K1A 0S5

Email: dgsiopinionpublique.isbpublicopinion@tpsgc-pwgsc.gc.ca