



23rd

Annual Report on Government of Canada Public Opinion Research Activities

2023 to 2024 Fiscal Year



Government
of Canada

Gouvernement
du Canada

Canada

23rd Annual Report on Government of Canada Public Opinion Research Activities

2023 to 2024 Fiscal Year

This report provides information on public opinion research activities contracted by the government between April 1, 2023 and March 31, 2024.

It informs Canadians about research projects executed by departments and the roles of key stakeholders involved in public opinion research.

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

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dgsiopinionpublique.isbpublicopinion@tpsgc.pwgsc.gc.ca.



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The year at a glance

In the 2023 to 2024 fiscal year, Public Services and Procurement Canada (PSPC) awarded 155 public opinion research contracts on behalf of 36 departments to 23 suppliers at a total value of \$19.4 million. This includes subscriptions to syndicated research studies shared among federal departments.

Overview of public opinion research activities in the fiscal year 2023 to 2024



Understanding Canadians

In this section:

- [Taking public perspectives into account](#)
- [Breakdown of research methods](#)
- [Target audiences](#)

Taking public perspectives into account

In a time defined by constant change and differing views, understanding public opinion is important for effective delivery of our services to Canadians. Public opinion research is an essential tool to gain insights on a range of subjects that impact Canadians. For the government, it helps to shape initiatives and address the needs of the population.

Through the use of public opinion research, the Government of Canada gathers information on attitudes, views and preferences on its policies and services. It also measures the effectiveness of its communications and programs. Public opinion research gives a real time snapshot of what Canadians value and care about. These insights are imperative to advancing responsive governance and evidence-based decision making.

This year, notable efforts were made to support ongoing work on the economy, health, safety and environmental concerns, including but not limited to:

- affordable living for Canadians
- the state of the economy
- national security
- Canadian health behaviours

The government also engaged in research on:

- public health and dental care
- climate change and the adoption of zero-emission vehicles

Public opinion research is the collection of opinion-based information from the public or any target audience.

We use quantitative and qualitative methods such as surveys and focus groups to gather information on:

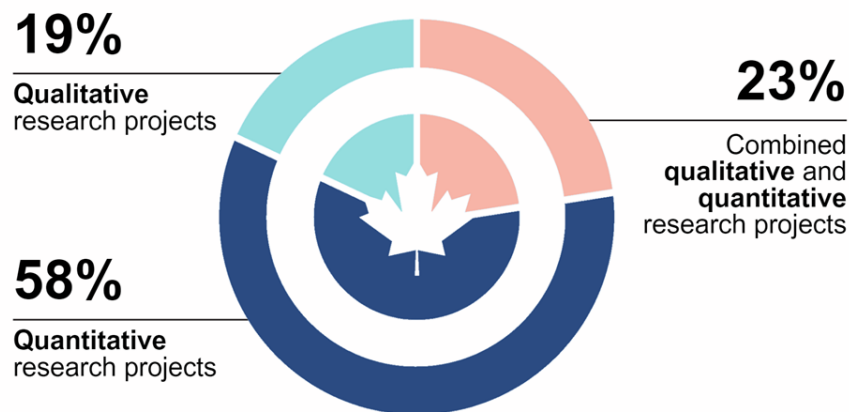
- attitudes
- perceptions
- judgments
- reactions
- views

Research is conducted in a manner that respects and protects the rights of participants. To learn more, consult the [Standards for the Conduct of Government of Canada Public Opinion Research](#).

Through this research, the government was committed to ensuring that the voices of individuals were heard and valued.

The following report provides information on public opinion research projects that were contracted by the government between April 1, 2023, and March 31, 2024.

Breakdown of research methods



Research methods

Public opinion research relies on various data collection techniques to obtain information from a wide variety of audiences. The research methods used to reach these audiences are qualitative, quantitative or a combination of both.

Qualitative research is widely used to gain understanding of people's behaviours and perceptions. With this research, exploratory questions, such as how or why, are often used. The most commonly used techniques are focus group discussions and individual interviews. Qualitative methods do not yield numeric data and the findings cannot be projected to the broader population.

Quantitative research uses structured methods to obtain precise, objective and measurable data that can be analyzed using statistical procedures. Quantitative methods aim to be conclusive, answering questions such as what, when, and where. These methods use techniques such as telephone and online surveys to collect data with the goal of obtaining results that reflect the broader population.

Target audiences

The audiences included the general population and the following groups in 2023 to 2024:

- 2SLGBTQI+
- benefit recipients
- business owners and representatives
- food and beverage exporters and importers
- grocery buyers
- homeowners and renters
- Indigenous peoples
- international travellers
- job seekers
- low income families
- medical and health professionals
- newcomers and immigrants
- parents, guardians, caregivers and pregnant women
- park visitors
- people living with chronic diseases and life-limiting illnesses
- people living in the North
- people with disabilities
- public servants, Canadian Armed Forces members and veterans
- seniors
- smokers, vapers and cannabis users
- supporters of climate action
- taxpayers
- telecommunication plan subscribers
- veterinarians
- youth
- zero-emission vehicle owners and intended buyers

The year through numbers

In this section:

- [Custom studies](#)
- [Syndicated studies](#)
- [Procurement methods](#)
- [Volume of research studies over the last 5 years](#)

Custom studies

- [Table 1: Volume of custom studies by department in 2023 to 2024](#)
- [Table 2: Volume of custom studies by supplier in 2023 to 2024](#)
- [Table 3: List of custom studies by department in 2023 to 2024](#)

Departments contract custom research studies to collect specific information. To conduct these studies, they must develop a detailed statement of work that describes the project's scope, objectives and requirements.

Suppliers that were awarded contracts for custom public opinion research delivered various services, from research design to data collection, data analysis and reporting.

In 2023 to 2024, the government awarded and/or issued amendments to 147 contracts for custom public opinion research services to 21 suppliers at a total value of \$18.5 million.

Table 1: Volume of custom studies by department in 2023 to 2024

Department	Number of custom studies	Contract value
Administrative Tribunals Support Service Canada	1	\$38,950.49
Agriculture and Agri-Food Canada	5	\$484,880.34
Canada Economic Development for Quebec Regions	1	\$26,245.38

Canada Revenue Agency	13	\$1,245,446.06
Canada School of Public Service	1	\$5,085.00
Canadian Food Inspection Agency	3	\$562,067.65
Canadian Heritage	3	\$361,256.99
Canadian Radio-television and Telecommunications Commission	5	\$583,001.49
Canadian Transportation Agency	1	\$65,822.50
Communications Security Establishment Canada	3	\$159,313.05
Department of Finance Canada	1	\$129,893.50
Employment and Social Development Canada	7	\$907,928.17
Environment and Climate Change Canada	4	\$323,873.82
Financial Consumer Agency of Canada	5	\$933,947.76
Fisheries and Oceans Canada	2	\$139,821.63
Health Canada	20	\$2,099,483.71
Immigration, Refugees and Citizenship Canada	5	\$643,166.53
Impact Assessment Agency of Canada	1	\$19,800.00
Innovation, Science and Economic Development Canada	5	\$622,075.17
National Defence	2	\$88,416.57
Natural Resources Canada	4	\$293,164.94
Office of the Chief Electoral Officer	4	\$351,310.74
Office of the Commissioner of Official Languages	1	\$119,186.75
Office of the Privacy Commissioner of Canada	1	\$72,252.20

Office of the Superintendent of Financial Institutions Canada	2	\$88,493.69
Parks Canada	5	\$352,076.09
Privy Council Office	4	\$2,206,752.14
Public Health Agency of Canada	21	\$3,531,077.59
Public Safety Canada	5	\$657,897.87
Public Services and Procurement Canada	1	\$178,562.60
Royal Canadian Mounted Police	2	\$329,428.00
Transport Canada	4	\$397,454.90
Veterans Affairs Canada	5	\$509,333.94
Grand Total	147	\$18,527,467.26

Note for table 1

The volumes reported in the “Contract value” column represent the total value of all contracts issued in the 2023 to 2024 fiscal year, which includes any amendments that would have increased or decreased the contract values within the same period.

Table 2: Volume of custom studies by supplier in 2023 to 2024

Supplier	Number of custom studies	Contract value
Abacus Data Inc.	1	\$247,799.40
Advanis Inc.	17	\$2,470,443.75
Earnscliffe Strategy Group GP	11	\$1,573,218.83
Ekos Research Associates Inc.	15	\$1,608,736.43
Elemental Data Collection Inc.	5	\$1,305,278.71
Environics Research Group Limited	15	\$1,646,622.25
Forum Research Inc.	1	\$179,699.38

Gregg, Kelly, Sullivan & Woolstencroft: The Strategic Counsel	6	\$1,343,338.64
Institute for Catastrophic Loss Reduction	1	\$39,550.00
Ipsos Limited Partnership	14	\$2,051,648.50
Kelly Sears Consulting Group	1	\$38,950.49
Léger Marketing	20	\$1,802,213.57
Nanos Research Corporation	6	\$365,422.96
Narrative Research Inc.	8	\$841,155.05
Phoenix SPI	9	\$1,004,311.48
Pollara	2	\$313,228.82
Quorus Consulting Group Inc.	9	\$1,226,199.16
Sage Research Corporation	3	\$371,425.35
The Logit Group Incorporated	1	\$38,425.37
Ultralogix	1	\$19,800.00
Vox Pop Labs	1	\$39,999.12
Grand Total	147	\$18,527,467.26

Note for table 2

The volumes reported in the “Contract value” column represent the total value of all contracts issued in the 2023 to 2024 fiscal year, which includes any amendments that would have increased or decreased the contract values within the same period.

Table 3: List of custom studies by department in 2023 to 2024

Department	Custom study title	Registration Number	Supplier	Contract Value
Administrative Tribunals Support Service Canada	End-User Feedback on the Navigator Service in the Appeal Division of the Social Security Tribunal 2022 to 2023	POR 011-23	Kelly Sears Consulting Group	\$38,950.49
Agriculture and Agri-Food Canada	2023 to 2024 Canadian Consumers Survey, Wave 2	POR 054-23	Earnscliffe Strategy Group GP	\$79,693.25
Agriculture and Agri-Food Canada	2023 to 2024 Consumer Perceptions of Canadian Agriculture, Foods and Seafood Products in Vietnam, Japan, the Philippines, and South Korea	POR 089-23	Ipsos Limited Partnership	\$99,632.10
Agriculture and Agri-Food Canada	2023 to 2024 Strategic Issues Survey of Food and Beverage Processors, Wave IV	POR 052-23	Environics Research Group Limited	\$94,835.25
Agriculture and Agri-Food Canada	2023 to 2024 Strategic Issues Survey With Producers, Wave VIII	POR 055-23	Pollara	\$144,459.93
Agriculture and Agri-Food Canada	Canadian Producers' Factors and Barriers to Adoption of Beneficial Management Practices and Trusted Information Sources	POR 138-23	Elemental Data Collection Inc.	\$66,259.81

Canada Economic Development for Quebec Regions	Survey on Canada Economic Development for Quebec Regions Awareness and Reputation	POR 132-23	Léger Marketing	\$26,245.38
Canada Revenue Agency	2022 to 2023 ePayroll Public Opinion Research	POR 135-22	Nanos Research Corporation	-\$3,821.49
Canada Revenue Agency	2023 to 2024 Benefits and Credits Advertising Campaign, Advertising Campaign Evaluation Tool (ACET)	POR 143-23	Ipsos Limited Partnership	\$42,488.57
Canada Revenue Agency	2023 to 2024 Canada Child Benefit, Satisfaction Survey	POR 094-23	Gregg, Kelly, Sullivan & Woolstencroft: The Strategic Counsel	\$101,468.35
Canada Revenue Agency	2023 to 2024 Canada Revenue Agency Annual Corporate Research, Qualitative Component	POR 134-23	Phoenix SPI	\$169,806.23
Canada Revenue Agency	2023 to 2024 Canada Revenue Agency Annual Corporate Research, Quantitative Component	POR 063-23	Quorus Consulting Group Inc.	\$174,047.12
Canada Revenue Agency	2023 to 2024 Canada Revenue Agency Be Scam Smart Advertising Campaign, Advertising Campaign Evaluation Tool (ACET)	POR 127-23	Narrative Research Inc.	\$22,436.15
Canada Revenue Agency	2023 to 2024 Canda Revenue Agency Be Scam Smart Advertising Campaign Concept Testing	POR 040-23	Advanis Inc.	\$49,060.08

Canada Revenue Agency	2023 to 2024 Canada Revenue Agency Benefits and Credits Campaign Concept Testing	POR 047-23	Earnscliffe Strategy Group GP	\$94,411.50
Canada Revenue Agency	2023 to 2024 Credential and Authentication Qualitative Research Program	POR 141-23	Nanos Research Corporation	\$117,836.40
Canada Revenue Agency	2023 to 2024 Dissatisfaction With Contact Centre Focus Groups	POR 109-23	Sage Research Corporation	\$87,976.15
Canada Revenue Agency	Business Number Registration Modernization Project	POR 139-23	Ipsos Limited Partnership	\$119,949.50
Canada Revenue Agency	GST/HST Filing Compliance	POR 112-23	Earnscliffe Strategy Group GP	\$114,960.55
Canada Revenue Agency	Qualitative Research on the Canada Revenue Agency Services: Progress Tracker and Submit Documents	POR 142-23	Sage Research Corporation	\$154,826.95
Canada School of Public Service	Employee Identified Learning Needs: Final Report	POR 110-22	Nanos Research Corporation	\$5,085.00
Canadian Food Inspection Agency	Canadian Food Inspection Agency Public Opinion Research for the Animal Business Line 2023 to 2024	POR 108-23	Earnscliffe Strategy Group GP	\$174,717.21

Canadian Food Inspection Agency	Canadian Food Inspection Agency Public Opinion Research for the Plant Business Line 2023 to 2024	POR 101-23	Environics Research Group Limited	\$126,390.50
Canadian Food Inspection Agency	Public Opinion Research for the Food Business Line 2023 to 2024	POR 103-23	Quorus Consulting Group Inc.	\$260,959.94
Canadian Heritage	Physical Activity Monitor: A Cross-Sectional Study of Beliefs, Attitudes, Motivations and Capacity Related to Sport and Physical Activity Among the Canadian Population	POR 106-23	Léger Marketing	\$119,859.10
Canadian Heritage	Study on the Appreciation and Perception of Canada's Two Official Languages, Survey of Official Language Minority Communities	POR 120-23	Vox Pop Labs	\$39,999.12
Canadian Heritage	Survey on Ethics, Equity and Safety in Sport, General Population, National Sport Organizations (NSO) and Athletes	POR 107-23	Léger Marketing	\$201,398.77
Canadian Radio-television and Telecommunications Commission	Canadian Radio-television and Telecommunications Commission Public Opinion Research Tracker, Phase 2 Study	POR 102-23	Ipsos Limited Partnership	\$121,075.57

Canadian Radio-television and Telecommunications Commission	Canadian Radio-television and Telecommunications Commission's Consumer Protection Codes 2024	POR 084-23	Phoenix SPI	\$114,485.95
Canadian Radio-television and Telecommunications Commission	Public Opinion Research to Enhance the Transparency of Information Provided to Broadband Customers	POR 086-23	Earnscliffe Strategy Group GP	\$105,874.22
Canadian Radio-television and Telecommunications Commission	Research on Why Customers Change Communications Service Providers and Barriers to Switching Providers, Fall 2022 to Winter 2023	POR 148-22	Sage Research Corporation	\$128,622.25
Canadian Radio-television and Telecommunications Commission	Understanding Consumer Awareness and Satisfaction With the Commission for Complaints for Telecommunications Services	POR 080-23	Nanos Research Corporation	\$112,943.50
Canadian Transportation Agency	2023 Canadian Transportation Agency Public Opinion Research Air Passenger Baseline Survey	POR 045-23	Ekos Research Associates Inc.	\$65,822.50
Communications Security Establishment Canada	2023 to 2024 Online Disinformation Advertising Creative Testing	POR 048-23	Ekos Research Associates Inc.	\$45,192.09
Communications Security Establishment Canada	2023 to 2024 Online Disinformation Advertising Creative Testing Evaluation Tool, Advertising Campaign Evaluation Tool (ACET)	POR 079-23	Elemental Data Collection Inc.	\$33,035.55

Communications Security Establishment Canada	Get Cyber Safe Awareness Tracking Survey	POR 119-23	Phoenix SPI	\$81,085.41
Department of Finance Canada	2023 to 2024 Pre- and Post-Budget Focus Groups	POR 036-23	Environics Research Group Limited	\$129,893.50
Employment and Social Development Canada	2023 Public Opinion Research on Accessibility, Third Cycle	POR 135-23	Environics Research Group Limited	\$174,952.25
Employment and Social Development Canada	2023 to 2024 Services for Seniors Advertising Campaign, Evaluation	POR 029-23	Ekos Research Associates Inc.	\$70,314.25
Employment and Social Development Canada	2023/2024 to 2024/2025 Upgrade Your Skills Advertising Campaign, Creative Testing and Evaluation	POR 033-23	Narrative Research Inc.	\$130,249.45
Employment and Social Development Canada	2024 to 2025 National Skilled Trades Advertising Campaign, Public Opinion Survey	POR 013-23	Earnscliffe Strategy Group GP	\$56,423.73
Employment and Social Development Canada	Inclusive Workplaces Phase 4 Advertising Campaign, Online Survey and Creative Testing With Small and Medium Size Enterprises	POR 015-22	Environics Research Group Limited	\$53,449.00
Employment and Social Development Canada	Inclusive Workplaces, Advertising Campaign Evaluation Tool (ACET)	POR 044-23	Léger Marketing	\$122,688.34
Employment and Social Development Canada	Service Canada Client Experience Survey 2022 to 2023	POR 006-23	Ipsos Limited Partnership	\$299,851.15

Environment and Climate Change Canada	Climate Advertising Awareness Campaign Public Opinion Research, Concept Testing and Advertising Campaign Evaluation Tool (ACET) Report	POR 026-23	Narrative Research Inc.	\$97,824.10
Environment and Climate Change Canada	National Pollutant Release Inventory Survey of Data Users 2024	POR 049-23	Ekos Research Associates Inc.	\$45,476.85
Environment and Climate Change Canada	Public Opinion Research on the National Adaptation Strategy	POR 015-23	Léger Marketing	\$135,734.47
Environment and Climate Change Canada	Updating Non-Market Values of Restoring the Great Lakes 2023 to 2024 Survey of Opinion	POR 121-23	Ipsos Limited Partnership	\$44,838.40
Financial Consumer Agency of Canada	2024 Canadian Financial Capability Survey	POR 125-23	Advanis Inc.	\$259,763.33
Financial Consumer Agency of Canada	COVID-19 Financial Well-Being Survey 2022 to 2023	POR 079-22	Ekos Research Associates Inc.	\$100,810.00
Financial Consumer Agency of Canada	Financial Consumer Agency of Canada Survey of Stablecoin Users (Canada) 2023	POR 041-23	Ipsos Limited Partnership	\$172,895.65
Financial Consumer Agency of Canada	Financial Well-Being Survey 2023	POR 023-23	Ekos Research Associates Inc.	\$299,911.04
Financial Consumer Agency of Canada	Pre-Testing and Evaluation of the "Make Change That Counts: Managing Your Money in a Changing World" Ad Campaign	POR 078-23	Léger Marketing	\$100,567.74

Fisheries and Oceans Canada	Building a Baseline Survey on the Social and Cultural Values of the Ocean With Coastal Residents in British-Columbia	POR 133-23	Ekos Research Associates Inc.	\$99,984.61
Fisheries and Oceans Canada	Portrait of Fish Habitat Restoration	POR 037-23	Léger Marketing	\$39,837.02
Health Canada	Canada Dental Benefit, Expanded Baseline Survey	POR 014-23	Gregg, Kelly, Sullivan & Woolstencroft: The Strategic Counsel	\$182,147.53
Health Canada	Canadian Dental Care Plan Messages Focus Testing	POR 018-23	Narrative Research Inc.	\$144,577.85
Health Canada	Canadian's Perspectives on Safety Information Disclosure for Consumer Chemical Products	POR 081-23	Ipsos Limited Partnership	\$72,627.36
Health Canada	Canadians' View and Use of Natural Health Products, Non-Prescription Drugs, and Health Products Containing Cannabidiol	POR 059-23	Ekos Research Associates Inc.	\$80,704.60
Health Canada	Cannabis Use Among Older Adults in Canada: Exploring Perspectives and Experiences Following Cannabis Legalization	POR 056-23	Narrative Research Inc.	\$123,576.80
Health Canada	Cannabis Use Among Sexual and Gender Minorities Across Canada, Perspectives and Experiences Following Legalization	POR 057-23	Narrative Research Inc.	\$126,237.95

Health Canada	Evaluating Various Components of Employee Assistance Services (EAS) Client Services 2023 to 2024	POR 043-23	Elemental Data Collection Inc.	\$30,755.78
Health Canada	Follow-up Survey and Qualitative Research on Controlled Substances Awareness, Knowledge and Behaviours for Public Education 2024	POR 088-23	Earnscliffe Strategy Group GP	\$214,725.99
Health Canada	Palliative Care Advertising Creatives Quality Validation and Understanding the Views of Caregivers/Family	POR 034-23	Earnscliffe Strategy Group GP	\$76,415.12
Health Canada	Post Advertising Campaign Evaluation Tool (ACET), Canada Dental Benefit Campaign	POR 061-23	Léger Marketing	\$54,867.15
Health Canada	Post-Evaluation of Stigma and Opioid Harm Reduction Advertising Campaign	POR 090-23	Ipsos Limited Partnership	\$47,284.85
Health Canada	Public Awareness of Alcohol-Related Harms Survey, Focus on Younger Adults (PAAHS-FYA)	POR 104-23	Phoenix SPI	\$99,790.30
Health Canada	Smokers Panel Surveys and Interviews 2022 to 2023	POR 072-22	Enviro-nics Research Group Limited	-\$36,915.26
Health Canada	Study on Smoking Cessation Strategies Among Canadian Adults Who Smoke	POR 119-22	Quorus Consulting Group Inc.	\$12,842.45

Health Canada	The Canadian Cannabis Survey 2024	POR 128-23	Advanis Inc.	\$299,907.42
Health Canada	Understanding Daily Cannabis Use in Canada	POR 071-23	Quorus Consulting Group Inc.	\$115,084.85
Health Canada	Understanding, Appraisal and Use of Sugars Labelling by Canadians to Make Healthy Food Choices	POR 087-23	Léger Marketing	\$94,679.31
Health Canada	Vapers Panel Surveys and Interviews 2022 to 2023	POR 070-22	Environics Research Group Limited	-\$24,338.84
Health Canada	Youth and Young Adults Vaping Segmentation	POR 077-23	Earnscliffe Strategy Group GP	\$249,836.84
Health Canada	Youth Marketing Product Validation, Quantitative and Qualitative Study	POR 042-23	Léger Marketing	\$134,675.66
Immigration, Refugees and Citizenship Canada	2023 to 2024 Immigration, Refugees and Citizenship Canada Annual Tracking Study	POR 069-23	Ipsos Limited Partnership	\$295,428.24
Immigration, Refugees and Citizenship Canada	2023 to 2024 Immigration, Refugees and Citizenship Canada Online Tracking Surveys	POR 031-23	Léger Marketing	\$49,991.20
Immigration, Refugees and Citizenship Canada	2023 to 2024 Inclusive Communities Advertising Campaign Evaluation Tool (ACET)	POR 064-23	Léger Marketing	\$43,542.29
Immigration, Refugees and Citizenship Canada	2023 to 2024 International Experience Canada Youth Study	POR 072-23	Environics Research Group Limited	\$199,784.00

Immigration, Refugees and Citizenship Canada	2023 to 2024 Newcomer Services Advertising Campaign Evaluation Tool (ACET)	POR 065-23	Advanis Inc.	\$54,420.80
Impact Assessment Agency of Canada	Indigenous Engagement and Consultation Data Collection Tool Development	POR 002-23	Ultralogix	\$19,800.00
Innovation, Science and Economic Development Canada	2023 to 2024 Competition Bureau Stakeholder Awareness and Influence Survey	POR 062-23	Earnscliffe Strategy Group GP	\$199,980.62
Innovation, Science and Economic Development Canada	Business Support Campaign Evaluation Research	POR 050-23	Quorus Consulting Group Inc.	\$217,609.75
Innovation, Science and Economic Development Canada	Canada's National Quantum Strategy Survey	POR 110-23	Nanos Research Corporation	\$73,517.80
Innovation, Science and Economic Development Canada	Canadian Investor, Business and Consumer Confidence in the Accuracy of Clean Fuel Measurement Devices, Wave 2, 2024 to 2025	POR 117-23	Environics Research Group Limited	\$124,865.00
Innovation, Science and Economic Development Canada	Study on Estimating Consumer Data Value of Canadian Data Portability	POR 059-22	Environics Research Group Limited	\$6,102.00
National Defence	Testing Recall of Recruitment Advertising: 2023-2024 Canadian Armed Forces "This is For You" Awareness Campaign	POR 008-23	The Logit Group Incorporated	\$38,425.37

National Defence	The Canadian Armed Forces Recruitment Focus Group Study, 2023 to 2024	POR 024-23	Gregg, Kelly, Sullivan & Woolstencroft: The Strategic Counsel	\$49,991.20
Natural Resources Canada	2023 to 2024 Green Freight Programs Survey on the Freight Industry	POR 097-23	Phoenix SPI	\$78,044.58
Natural Resources Canada	Canadians' Awareness, Knowledge and Attitudes Related to Zero Emissions Vehicles 2024	POR 096-23	Ekos Research Associates Inc.	\$76,229.80
Natural Resources Canada	Energy Transition and Energy Affordability Perceptions Study	POR 098-23	Quorus Consulting Group Inc.	\$116,243.10
Natural Resources Canada	Heat Pump Advertising Awareness Among Canadians	POR 122-23	Léger Marketing	\$22,647.46
Office of the Chief Electoral Officer	General Election 45 Voter Information Campaign: Qualitative Pre-Event Communications Testing With Youth	POR 025-23	Environics Research Group Limited	\$108,576.05
Office of the Chief Electoral Officer	Survey of Candidates for the 45th Federal General Election	POR 010-23	Léger Marketing	\$68,516.69
Office of the Chief Electoral Officer	Survey of Election Officers for the 45th Federal General Election	POR 009-23	Quorus Consulting Group Inc.	\$98,999.30
Office of the Chief Electoral Officer	Surveys of Electors Following By-Elections Held in Fiscal Years 2021 to 2022 Through 2025 to 2026	POR 033-21	Phoenix SPI	\$75,218.70

Office of the Commissioner of Official Languages	Myths, Realities and Perceptions About the English-Speaking Communities of Quebec and Their Relationship With French in Quebec and Bilingualism in Canada	POR 083-23	Environics Research Group Limited	\$119,186.75
Office of the Privacy Commissioner of Canada	2023 Survey of Canadian Businesses on Privacy-Related Issues	POR 073-23	Phoenix SPI	\$72,252.20
Office of the Superintendent of Financial Institutions Canada	2023 to 2024 Employee Engagement Survey (EES)	POR 035-23	Ekos Research Associates Inc.	\$43,502.74
Office of the Superintendent of Financial Institutions Canada	Financial Institutions Survey (FIS) 2023 to 2024	POR 038-23	Gregg, Kelly, Sullivan & Woolstencroft: The Strategic Counsel	\$44,990.95
Parks Canada	Parks Canada National Advertising Campaign Evaluation Tool (ACET)	POR 082-23	Advanis Inc.	\$46,714.20
Parks Canada	Parks Canada Recreation Study 2023	POR 053-23	Advanis Inc.	\$61,562.40
Parks Canada	Parks Canada Tracking Study 2023 to 2024	POR 003-23	Advanis Inc.	\$152,732.79
Parks Canada	Parks Canada Tracking, Symbol	POR 004-23	Advanis Inc.	\$13,560.00
Parks Canada	Visitor Satisfaction Survey 2023	POR 005-23	Advanis Inc.	\$77,506.70

Privy Council Office	Continuous Qualitative Data Collection of Canadians' Views	POR 053-22	Gregg, Kelly, Sullivan & Woolstencroft: The Strategic Counsel	\$814,741.30
Privy Council Office	Continuous Tracking of Canadians' Views, Quantitative Survey	POR 003-22	Elemental Data Collection Inc.	\$1,112,598.00
Privy Council Office	Program of Applied Research on Climate Action: Ongoing Surveying of Canadians' Climate Change Beliefs, Attitudes, and Behaviours Over Time	POR 020-23	Forum Research Inc.	\$179,699.38
Privy Council Office	Public Health Monitor Surveying of Canadians' Public Health, Attitudes, and Behaviours	POR 030-23	Léger Marketing	\$99,713.46
Public Health Agency of Canada	Baseline and Post-Campaign Advertising Campaign Evaluation Tool (ACET) for Dementia Risk Reduction Advertising Campaign	POR 066-23	Ipsos Limited Partnership	\$68,975.20
Public Health Agency of Canada	Childhood COVID-19 Immunization Coverage Survey, 2024	POR 131-23	Advanis Inc.	\$292,727.40
Public Health Agency of Canada	Childhood Immunization Coverage Survey Among Key At-Risk and Equity-Deserving Canadian Populations: General Population and Recent Immigrant Parents 2024	POR 123-23	Advanis Inc.	\$122,006.10

Public Health Agency of Canada	Childhood Immunization Coverage Survey Among Key At-Risk and Equity-Deserving Canadian Populations: Health Care Worker Parents 2024	POR 136-23	Léger Marketing	\$38,489.10
Public Health Agency of Canada	Childhood Immunization Coverage Survey Among Key At-Risk and Equity-Deserving Canadian Populations: Indigenous Parents 2024	POR 130-23	Léger Marketing	\$27,784.89
Public Health Agency of Canada	Childhood Immunizations Coverage Survey Among Key At-Risk and Equity-Deserving Canadian Populations: 2SLGBTQI+ and Men Who Have Sex With Men Parents 2024	POR 124-23	Advanis Inc.	\$106,564.65
Public Health Agency of Canada	Childhood Vaccination Advertising Campaign, Advertising Campaign Evaluation Tool (ACET)	POR 046-23	Elemental Data Collection Inc.	\$62,629.57
Public Health Agency of Canada	Emergency Preparedness and Response in Canada for People Living With Dementia	POR 100-23	Narrative Research Inc.	\$119,661.35
Public Health Agency of Canada	Estimation of Post-Acute Conditions Associated With COVID-19 Vaccine Impact and Effectiveness Among Children and Adolescents in Canada	POR 126-23	Ipsos Limited Partnership	\$299,835.10

Public Health Agency of Canada	HIV, Syphilis and Sexually Transmitted and Blood-Borne Infections (STBBI) Awareness and Perceptions Survey	POR 067-23	Gregg, Kelly, Sullivan & Woolstencroft: The Strategic Counsel	\$149,999.31
Public Health Agency of Canada	Mental Health and 9-8-8 Suicide Hotline, Three Advertising Campaign Evaluation Tool (ACET) Surveys	POR 116-23	Ipsos Limited Partnership	\$129,839.71
Public Health Agency of Canada	Mental Health, Substance Use and 9-8-8: Suicide Crisis Helpline, Advertising Concept Testing	POR 068-23	Quorus Consulting Group Inc.	\$133,984.10
Public Health Agency of Canada	Mental Health, Substance Use and Polysubstance Use Study	POR 118-23	Earnscliffe Strategy Group GP	\$206,179.80
Public Health Agency of Canada	Mpox Immunization Coverage Among 2SLGBTQI+ and Men Who Have Sex With Men 2024	POR 093-23	Advanis Inc.	\$107,304.80
Public Health Agency of Canada	Opioid Overdose Crisis Brand and Message Focus Testing	POR 115-23	Narrative Research Inc.	\$76,591.40
Public Health Agency of Canada	Public Decision-Making Regarding the Use of Personal Protective Measures to Prevent the Spread of Respiratory Infectious Diseases	POR 085-23	Abacus Data Inc.	\$247,799.40
Public Health Agency of Canada	Return to Baseline: Dementia Tracking Survey	POR 091-23	Ekos Research Associates Inc.	\$199,476.08

Public Health Agency of Canada	Seasonal Influenza Vaccination Coverage Survey 2023 to 2024	POR 099-23	Léger Marketing	\$300,000.00
Public Health Agency of Canada	Survey on Vaccination During Pregnancy (SVP) 2024	POR 140-23	Advanis Inc.	\$295,285.95
Public Health Agency of Canada	Understanding Canadian Health Professionals' Knowledge, Attitudes, Opinions, and Perceptions Towards Zoonotic Infectious Diseases Survey and Interviews 2023 to 2024	POR 074-23	Environics Research Group Limited	\$249,871.25
Public Health Agency of Canada	Vulnerable and Hard-to-Reach Populations COVID-19 Immunization Coverage Survey 2024	POR 092-23	Advanis Inc.	\$296,072.43
Public Safety Canada	Guns and Gangs Awareness Campaign, Quantitative Research	POR 114-23	Ekos Research Associates Inc.	\$96,352.28
Public Safety Canada	Human Trafficking Public Awareness Study	POR 032-23	Environics Research Group Limited	\$262,397.30
Public Safety Canada	Motivations of Cannabis Users Who Obtain Cannabis From Sources Other Than Legal/Licensed Sources	POR 028-23	Quorus Consulting Group Inc.	\$96,428.55
Public Safety Canada	Online Child Sexual Exploitation Public Awareness Campaign	POR 022-23	Ekos Research Associates Inc.	\$163,169.74

Public Safety Canada	Study of Homeowner Willingness to Pay For Flood Insurance, Canadian Homeowners at Extreme Risk	POR 007-23	Institute for Catastrophic Loss Reduction	\$39,550.00
Public Services and Procurement Canada	Pension Services Feedback Survey	POR 012-23	Advanis Inc.	\$178,562.60
Royal Canadian Mounted Police	2023 to 2024 Canadians' Views of the Royal Canadian Mounted Police (RCMP) Policing Services	POR 111-23	Ekos Research Associates Inc.	\$92,500.90
Royal Canadian Mounted Police	Public Opinion Research Study: Canadians' Perceptions of the Royal Canadian Mounted Police	POR 017-23	Ipsos Limited Partnership	\$236,927.10
Transport Canada	Oceans Protection Plan, Canadians' Confidence in Marine Safety 2024	POR 058-23	Pollara	\$168,768.89
Transport Canada	Public Opinion Research Study on Examining the Social Acceptance of Advanced Air Mobility (AAM) by the Canadian Public	POR 060-23	Léger Marketing	\$71,873.65
Transport Canada	Whales Initiative: Canadians' Awareness and Understanding of Southern Resident Killer Whales	POR 113-23	Phoenix SPI	\$99,238.86
Transport Canada	Youth Perceptions on Careers in Transportation, Addressing Labour Shortages	POR 039-23	EnviroNics Research Group Limited	\$57,573.50

Veterans Affairs Canada	2023 Remembrance and Recognition Ad Campaign, Advertising Campaign Evaluation Tool (ACET)	POR 075-23	Advanis Inc.	\$56,692.10
Veterans Affairs Canada	2023 to 2024 Veterans Affairs Canada Services for Veterans: Concept Testing and Advertising Campaign Evaluation Tool (ACET)	POR 070-23	Ekos Research Associates Inc.	\$129,288.95
Veterans Affairs Canada	2024 Veterans Affairs Canada National Client Survey	POR 129-23	Phoenix SPI	\$214,389.25
Veterans Affairs Canada	Evaluation of the 2023 to 2024 Mental Health Advertising Campaign	POR 076-23	Léger Marketing	\$49,101.89
Veterans Affairs Canada	Veterans' Understanding of Program Information and Eligibility Requirements for the Veterans Independence Program and Disability Benefits Webpages on veterans.gc.ca	POR 001-23	Nanos Research Corporation	\$59,861.75
Total				\$18,527,467.26

Note for table 3

A registration number is assigned to each study. This number can then be used to find the report on the [Library and Archives Canada](#) (LAC) website.

Some of these studies are not available at the time of publishing this report, given that departments have a period of 6 months after the completion of data collection to submit their reports to LAC.

The volumes reported in the “Contract value” column represent the total value of all contracts issued in the 2023 to 2024 fiscal year, which includes any amendments that would have increased or decreased the contract values within the same period.

The negative amounts represent amendments to reduce the value of a contract that was awarded in a previous fiscal year.

Syndicated studies

Separate to custom studies, the government purchases subscriptions to syndicated studies to gain access to findings from independent research. These studies cover a variety of broad issues, and are shared with all federal departments. The intellectual property rights remain with the research firm.

In 2023 to 2024, the government subscribed to 8 syndicated public opinion research studies at a total value of \$917,006.00.

Table 4: Volume of syndicated research studies in 2023 to 2024

Syndicated study title	Supplier	Contract value
Atlantic Quarterly	Narrative Research Inc.	\$38,646.00
Canadian Millennials Report	Abacus Data Inc.	\$67,800.00
Canadian Views on International Assistance	Development Engagement Lab	\$62,500.00
Citizens First 2023	Institute for Citizen-Centered Service	\$50,850.00
Exploring Western Canadian Identity 2024	Pollara	\$68,930.00
Indigenous Insights, 2023 to 2024, Volume 7	Earncliffe Strategy Group GP	\$203,400.00
Inflation Pressure Points	Pollara	\$106,785.00
Risk Monitor, 12th to 15th editions	Ekos Research Associates Inc.	\$318,095.00
Total		\$917,006.00

Procurement methods

There are different contracting methods for public opinion research.

A contract valued up to \$40,000 can be awarded through a process called **sole sourcing**. This type of contract does not require a competitive process due to a lower monetary value.

The vast majority of public opinion research contracts are issued against a **standing offer**. Public Services and Procurement Canada periodically conducts a rigorous and open competitive process to establish standing offers with an inventory of pre-qualified suppliers. This procurement method gives departments timely access to suppliers with demonstrated research expertise and pre-determined pricing for projects up to a contract value of \$300,000.

For public opinion research requirements falling outside the scope of the standing offer or for which the estimated contract value exceeds \$300,000, departments can use an open process called **public tender**. For this type of contract, the government posts a request for proposals on [CanadaBuys](#) to allow interested suppliers to bid for the research project. After a thorough evaluation, the supplier with the best proposal wins the contract.

To learn more on how the Government of Canada manages its contracted public opinion research and its procurement methods, see:

- the [stakeholders and their roles](#) section
- our Web page [Contracting public opinion research](#)

Table 5: Procurement methods for public opinion research in 2023 to 2024

Procurement methods	Number of research studies	% Contract value	Contract value
Call-ups against the standing offers	140	84.6%	\$16,448,268.35
Public tenders (CanadaBuys)	2	9.9%	\$1,927,339.30
Subscriptions to syndicated studies	8	4.7%	\$917,006.00
Sole-source contracts not exceeding \$40,000	5	0.8%	\$151,859.61
Total	155	100%	\$19,444,473.26

Volume of research studies over the last 5 years

The volume of research fluctuates from year to year depending on the government's needs. The following table represents a summary of past custom and syndicated research studies and contract values over the last 5 years.

Table 6: Volume of custom and syndicated research studies over the last 5 years

Period	Number of research studies	Contract value (in millions of dollars)
April 1, 2023 to March 31, 2024	155	\$19.4
April 1, 2022 to March 31, 2023	164	\$20.3
April 1, 2021 to March 31, 2022	155	\$18.1
April 1, 2020 to March 31, 2021	151	\$15.5
April 1, 2019 to March 31, 2020	121	\$11.3

Appendices

In this section:

- [Stakeholders and their roles in research](#)
- [Standing offers for public opinion research services](#)
- [Public opinion research-related laws, regulations and policies](#)

Stakeholders and their roles in research

The following stakeholders play pivotal roles in public opinion research activities.

Treasury Board of Canada Secretariat sets policies, directives and procedures for the management of public opinion research conducted by or for the Government of Canada.

Privy Council Office performs a central leadership role in the planning of public opinion research projects across the government.

Public Services and Procurement Canada plays a dual role by providing research advice and overall coordination through its Public Opinion Research Directorate and by issuing the contracts to the selected suppliers through its Communication and Advertising Procurement Directorate.

Departments define the research projects, select the suppliers, manage the issued contracts and ensure the overall quality of the research produced.

Suppliers conduct the public opinion research studies according to the departments' requirements and the Government of Canada research standards, and provide written reports as per regulations.

Library and Archives Canada makes contracted public opinion research reports available to Canadians in both official languages.

Standing offers for public opinion research services

The standing offers enable departments to obtain public opinion research services in an efficient and effective manner with qualified research firms, at predetermined prices, terms and conditions.

Four series of public opinion research services were available in 2023 to 2024:

- [Fieldwork and data tabulation for online surveys \(series A\)](#)
- [Fieldwork and data tabulation for telephone surveys \(series B\)](#)
- [Qualitative research \(series C\)](#)
- [Quantitative research \(series D\)](#)

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:

- Advanis Inc.
- Ekos Research Associates Inc.
- Elemental Data Collection Inc.
- Forum Research Inc.
- Ipsos Limited Partnership
- Léger Marketing
- Maru/Blue Canada Inc.
- Nanos Research Corporation
- Narrative Research Inc.
- 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:

- Advanis Inc.
- Ekos Research Associates Inc.
- Elemental Data Collection Inc.
- Ipsos Limited Partnership
- Léger Marketing
- Maru/Blue Canada Inc.
- Nanos Research Corporation
- The Logit Group Incorporated



Qualitative research (series C)

Departments may use this standing offer for qualitative research for the following services: developing the research design, conducting the research, 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:

- Abacus Data Inc.
- Advanis Inc.
- Earnscliffe Strategy Group GP
- Ekos Research Associates Inc.
- Entegrité Consulting
- Environics Research Group Limited
- Forum Research Inc.
- Gregg, Kelly, Sullivan & Woolstencroft: The Strategic Counsel
- Ipsos Limited Partnership
- Léger Marketing
- Maru/Blue Canada Inc.
- Nanos Research Corporation
- Narrative Research Inc.
- Patterson, Langlois Consultants with Element54 Inc, in joint venture
- Phoenix SPI
- Pollara
- PRA Inc.
- Probe Research Inc.
- Quorus Consulting Group Inc.
- Sage Research Corporation
- Synopsis Recherche Marketing Inc.



Quantitative research (series D)

Departments may use this standing offer for quantitative research for the following services: developing the research design, conducting the research, 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:

- Abacus Data Inc.
- Advanis Inc.
- Earncliffe Strategy Group GP
- Ekos Research Associates Inc.
- Environics Research Group Limited
- Forum Research Inc.
- Gregg, Kelly, Sullivan & Woolstencroft: The Strategic Counsel
- Ipsos Limited Partnership
- Léger Marketing
- Nanos Research Corporation
- Phoenix SPI
- Pollara
- Probe Research Inc.
- Quorus Consulting Group Inc.



Public opinion research-related laws, regulations and policies

Laws and regulations

- [Financial Administration Act](#) requires a written report for contracted public opinion research
- [Library and Archives of Canada Act](#) requires departments to provide written reports of custom contracted public opinion research to Library and Archives Canada within 6 months of completion of data collection
- [Public Opinion Research Contract Regulations](#) standardize the form and content of contracted public opinion research reports

Policy instruments

- [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
- [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](#) details requirements that federal departments must follow when public opinion research activities are being considered

Research standards

- [Standards for Conducting Public Opinion Research](#) provide departments and suppliers with requirements to follow for collecting information when conducting public opinion research to ensure that their studies meet high quality criteria

More information

This annual report provides an overview of the Government of Canada's public opinion research activities coordinated and contracted by Public Services and Procurement Canada on behalf of federal departments listed in Schedule I, Schedule I.1 or Schedule II of the [*Financial Administration Act*](#).

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

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