

Communication Canada



PUBLIC OPINION
RESEARCH
IN THE
GOVERNMENT
OF CANADA

Annual Report 2002–2003



Communication
Canada

Canada 

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RESEARCH
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Annual Report 2002–2003

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Research Branch



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Message From The Minister



*P*ublic opinion research (POR) is a vital tool for helping the Government of Canada meet the needs and expectations of citizens.

This 2002–2003 report highlights how public opinion research is intrinsic to many key Government of Canada decisions. It illustrates how departments and agencies work together to share information and research results. Finally, it shows how public opinion research plays a useful and valuable role for departments and agencies.

The last year has been significant not only in terms of advancements in the effectiveness of the public opinion research process in the Government of Canada but also in the validation of that process by the Treasury Board Secretariat's review. Completed in the summer of 2002, this review concluded that the POR function is generally well managed. Enhancements to existing structures were steadily improving performance. The goal is to provide quality work while ensuring the proper stewardship of public funds and enhancing public accountability.

My officials are continuing to seek improvements, guided by the principles of value for money, stewardship, flexibility and transparency. Last year, they consulted with representatives of major Canadian market research associations and departments and agencies. Those views and recommendations contributed greatly to the improvements that are being built on the strong management foundation already in place.

This work is ongoing. There will be other improvements building on experience and external findings such as a review of public opinion research by the Auditor General.

This report provides a snapshot of what has been accomplished with insight into the challenges we are ready to take on.

A handwritten signature in black ink, appearing to read 'R. Goodale', written in a cursive style. The signature is positioned above a thin horizontal line.

Ralph Goodale

Minister responsible for Communication Canada

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1. *Introduction*

*T*he mandate of Communication Canada is to maintain and improve communication between the Government of Canada and the Canadian population. To ensure that such communication is effective, it is necessary to gauge accurately how Canadians receive information, whether they understand the messages and if all of their questions are answered.

It is through such research that the Government of Canada can ensure that its messages are being conveyed accurately and that its programs and services meet the needs and expectations of all Canadians. Through opinion research, the Government of Canada has a better understanding of the views and needs of the Canadian population and users of government programs and services.

Communication Canada provides the technical and coordinating authority for Government of Canada public opinion research (POR). Its Research Branch facilitates public opinion research studies by helping departments throughout the process to ensure their objectives are met.

The 2002–2003 annual report reviews the activities of the Research Branch and chronicles highlights from the 576 public opinion research projects coordinated by Communication Canada on behalf of the Government of Canada during the fiscal year ended March 31, 2003.



2. *Communication Canada's Research Branch at Work*

Conducting public opinion research in Canada and abroad is a vital and growing element in developing policies, programs and services that meet the needs of Canadians. Annual investment in public opinion research by government departments and agencies has more than doubled in five years as reliance on research findings continues to influence:

- policy initiatives;
- delivery of programs and services;
- the assessment of demands and expectations of the Canadian population and stakeholders; and
- the judgment on value for public money spent.

The Government of Canada Communications Policy requires federal institutions to inform Communication Canada of all public opinion research projects before entering into any contractual arrangement.

The Research Branch has four areas of service designed to help departments and agencies in their public opinion research endeavours: Advisory Services, Coordination and Outreach, Corporate Research, and Applied Research.

The Coordination and Advisory Services—Public Opinion Research Directorate (CASPORD) offers research expertise to help government organizations develop coherent, relevant and reliable research in order to make informed decisions. Advisors provided help on research design, legal and policy requirements, industry standards, procurement methods and value for money to more than 40 departments and agencies.

Coordination and Outreach fosters research expertise, partnerships, and the sharing of research across the Government of Canada. The unit produces a variety of research guides, organizes seminars and information exchange meetings, and has developed an Extranet networking site. It also ensures reports are available to the public through the National Library of Canada and the Library of Parliament.

Corporate research undertakes projects such as the *Listening to Canadians* survey, which is conducted three times each year, as well as studies on literacy. The findings from these surveys serve the entire federal government by increasing understanding of societal trends, issues and events affecting government communications. Reports are posted on the Communication Canada Web site.

Applied research supports Communication Canada through advertising and communications research at both the national and regional levels. This service involves a variety of research techniques, including exit surveys at fairs and exhibitions.

The Research Branch works in concert with Public Works and Government Services Canada, the sole contracting authority for public opinion research. Contracting procedures vary from project to project, depending on the scope, dollar value, magnitude and other factors. These procedures are designed to ensure that the desired results are achieved and that contractors are treated equitably in the bidding and procurement process.

In 2002–2003, there were 714 project requests of which 44 were for amendments to existing contracts and 93 were outside the definition of POR and did not require coordination by Communication Canada. Overall, CASPORD coordinated 576 POR projects valued at \$23.7 million.

This section provides an overview of the activities, resources and initiatives undertaken in 2002–2003 in meeting the public opinion research needs of the Government of Canada.


PUBLIC OPINION RESEARCH RESOURCES AND TOOLS

Tools to help public service practitioners design and implement their public opinion research projects have been created by Communication Canada. A brief description of these resources follows.

Public Opinion Research in the Government of Canada: An Orientation Guide

Released in April 2002, this guide explains the process and players involved in undertaking public opinion research within the Government of Canada. A public opinion research project involves the client department or agency, Communication Canada, Public Works and Government Services Canada, and the research firm that carries out the actual project.

This guide includes an outline of a project summary and a section on best practices. It also provides the Treasury Board definition of public opinion research and explains what falls outside that purview.



Public Opinion Research in the Government of Canada: An Orientation Guide is available electronically at the CommNET Extranet site <http://commnet.gc.ca> and in hard copy from the Research Branch at Communication Canada. More than 1,700 copies have been distributed since its release in April 2002.

Research Techniques: Guideposts to Value

This resource is a vital tool as an introduction or refresher on research approaches for Government of Canada employees. It promotes best value for research dollars by outlining advantages and disadvantages of current data collection methods so the most effective approach can be used.

This publication provides information about conventional research methods as well as emerging techniques using the Internet and provides a brief glossary of key research terms. It defines public opinion research and includes an outline of procedures to be followed in acquiring research along with a list of key elements in the research process.

This document takes the reader through the entire process, beginning with the question of whether a survey or a focus group is the best route to follow, to helping decide whether qualitative or quantitative data or a combination of both would be the most useful in a specific project. Examples and comparative tables are included. More than 1,300 copies of this popular resource were distributed in the first month following its publication.

Research Techniques: Guideposts to Value is available electronically at the CommNET Extranet site <http://commnet.gc.ca> on Communication Canada's Internet site www.communication.gc.ca and in hard copy from the Research Branch at Communication Canada. It was released at year's end and first unveiled at the Government of Canada Communicators' Conference in May 2003.

POR on CommNET

The Communication Canada Extranet site for government communicators contains a prominent section on public opinion research. The site includes a list of Communication Canada advisors and the departments and agencies they serve, along with a list of more than 2,600 Government of Canada public opinion research reports produced since 1994, which have been deposited in the National Library of Canada and the Library of Parliament. For the first time, there is a bilingual list of the titles of all custom reports in the libraries' holding, which is updated regularly. (The reports can be accessed through interlibrary loans through departmental or local libraries.)

As the scope of the site has continued to expand, it has become an increasingly valuable resource for researchers. In October 2002 the site introduced the first annual report of public opinion research for the Government of Canada for fiscal year 2001–2002. This new feature has been very popular and useful among departments for providing the first ever corporate snapshots of public opinion research in the Government of Canada.

CommNET also contains information for those new to public opinion research. Users will find an outline of the public opinion research summary that is completed whenever a department initiates a public opinion research project. In response to requests from clients, a new section highlights the advantages and challenges of on-line public opinion research.

All of CASPORD's publications are also available on CommNET.

New Database

An on-line public opinion research database was developed during the year, offering a Web-based system to streamline the management of research project submissions from clients. Among its advantages, this system will soon enable all federal employees to share research, plans and results, bringing value-added in research to a new level and providing greater transparency.


Developed in collaboration with Communication Canada's Information Technology Group, the database will provide on-line access to details of research projects that are planned, underway and completed, along with research results.

Departmental research coordinators and/or clients will be able to submit research details for new research projects. They will be able to track their projects and review other Government of Canada research initiatives. The goal is to encourage the sharing of research, plans, results and best practices, in addition to identifying partnership opportunities to promote greater coordination on horizontal issues.

The new database will be pilot-tested in 2003–2004 with departmental clients and rolled out to all departments.

Advertising Evaluation

Communication Canada and the Privy Council Office co-chaired an interdepartmental committee of public opinion research coordinators involved in evaluating major Government of Canada advertising campaigns. This committee developed an advertising evaluation survey called "Advertising Campaign Evaluation Tool"—ACET—to be used for the assessment of the effectiveness of advertising campaigns.




The Research Branch helped develop the preliminary ACET, monitored the pilot ACET tests, coordinated and analysed the findings of the first use of the survey, and amended the tool to reflect the findings of the pilot test.

ACET is now standard and is used to evaluate major advertising campaigns with a media buy of over \$400,000. Federal departments are encouraged to use this quick evaluation process in smaller campaigns as well. The survey was used to evaluate eight campaigns in 2002 with at least double that number expected in 2003–2004.

In addition to improving the ability to measure advertising effectiveness, ACET is expected to help departments save money in the design of questionnaires and enhance research consistency through the use of standard questions.

Seminars and Info-Sessions



As part of the Research Branch's continuing goal to expand the public opinion research knowledge base within the Government of Canada, several information sessions were held in 2002–2003.

The first seminar was entitled “From Pop-Ups to Panels: Conducting Effective On-Line Surveys.” Participants overwhelmingly rated it useful to their work. Due to its popularity, it will be offered again.

The Research Branch held five information sessions for communicators to give an overview of the public opinion environment. Of the more than 300 people who attended, over 90 percent judged the presentations useful to their communications activities.

Finally, the Branch made a series of regional presentations to help communicators across Canada use research more effectively in product development. The presentations focused on knowledge transfer.

At the 2002 Communicators' Conference, the Branch made presentations on new ways to better communicate with youth and on the challenges of on-line research.

It also coordinated a workshop, led by the Deputy Director of Research from the Central Office of Information in Great Britain, on maximizing the impact of communications.

Partnerships

In the continuing effort to increase efficiency in government-wide research, the Research Branch has developed partnerships with Statistics Canada and Human Resources Development Canada on literacy, Indian and Northern Affairs Canada on an on-reserve Aboriginal survey, and the Privy Council Office on an off-reserve Aboriginal survey.

The branch signed a memorandum of understanding with Health Canada to assist in redesigning cigarette carton labels to better communicate with people of lower literacy levels. The Atlantic region of Communication Canada was aided in designing a long-term communication strategy.

A number of outreach initiatives were undertaken:

- to encourage better use of POR in communications, beginning with the development of any communication program; and
- to encourage greater use of POR in policy and program development.

These included a first private–public sector round table, initial consultations with the private and academic sectors, memoranda of understanding with universities (nine were in place or in negotiation at the end of the review period), and an international exchange with the United Kingdom.

Listening to Canadians

Three times a year Communication Canada takes the pulse of the nation through the *Listening to Canadians* survey. The survey of 6,000 people includes a series of core questions as well as others to track specific issues. For example, in 2002–2003, the survey provided research on issues such as the Kyoto Protocol, child poverty, infrastructure, and Canada-U.S. relations.

Interim data were shared while the survey was still in the field, providing government leaders and communication planners with relevant information at an unprecedented speed. These timely results were used, for example, by Human Resources Development Canada (HRDC) in communications planning on child poverty.

A total of 29 presentations on the survey results were made and more than 2,300 copies of the CD-ROM and report were distributed. Research Branch analysts received about 330 requests for research and analysis.



Literacy Tool Kit

Low literacy levels continue to be a problem in Canada with nearly one in two adults having some level of difficulty with reading or understanding (Reference: Statistics Canada, 1996). To help government employees communicate effectively with all Canadians, the Research Branch developed a tool kit entitled, *Successful Communication: Literacy and You*.

The Branch, in collaboration with Health Canada, also hosted two interactive workshops at the 2003 Communicators' Conference for over 200 government communicators. Attendees were invited to apply the tips and principles found in the tool kit to a specific communication initiative (i.e. cigarette carton labeling).

The tool kit is available in hard copy and on the Internet at www.communication.gc.ca.

INTERDEPARTMENTAL PUBLIC OPINION RESEARCH WORKING GROUP

Since 2001, an interdepartmental working group has been meeting regularly. Membership is open to all interested departments and agencies. This growing, informal group met five times during the year to discuss issues such as on-line research, procurement, sharing research results, advertising evaluations, and challenges facing POR organizations.

In 2003–2004, the group will examine opportunities to strengthen the POR community and to raise the profile of POR across government.

WE'RE HERE TO HELP . . .

Coordination and Advisory Services advisors can be consulted on any public opinion research project.

Check commnet.gc.ca
or call **(613) 943-5130**

for the name and telephone number
of the advisor serving your organization.



3. *Issues and Activities for 2003–2004*


*A*nalysis of activities in 2002–2003 illustrates how the Government of Canada conducts its POR function and provides an opportunity to embrace operational improvements to give Canadians more value for money and more input into government decision-making. Following a thorough examination, the Treasury Board Secretariat (TBS) concluded that POR is effectively managed in the Government of Canada and that procurement tools have been well developed. The TBS findings provided a solid base for moving forward and strengthening the public opinion research capacity in the Government of Canada.

As well, the Research Branch released a discussion paper on enhancements to the POR procurement process and consulted with Canadian market research associations and client departments and agencies. Their recommendations are helping to shape enhancements to the contracting process that will be implemented in 2003–2004. These enhancements have two over-arching elements. They ensure that all qualified public opinion research firms continue to be able to compete for Government of Canada contracts and that clear procedures on the standing offers be developed. This will mean increased transparency in the process and, through competition, assurance of value for money. A permanent private sector/Government of Canada working group has been established to put into practice the recommendations discussed at the initial consultation on procurement.

There are also other opportunities to enhance the efficiency of public opinion research in the Government of Canada. A review is underway of the practices for the purchase of syndicated surveys. Furthermore, enhanced operational guidelines will be developed for departments and agencies on such matters as the contents of final reports for custom research. A POR database will be launched to provide opportunities for partnering and to share all Government of Canada research results. Pilot and usability tests will help ensure the database enables Communication Canada and departments to efficiently manage research projects. New guides, such as one on innovative qualitative research techniques, are being prepared to assist all departments in planning the most effective research to meet their needs. These measures will enhance POR across the Government of Canada, strengthen coordination and help to ensure that departments and agencies submit their reports to the Research Branch.

The Office of the Auditor General began a review of POR in the fall of 2002. Related findings and recommendations are expected this fall.

To facilitate the sharing of research results and best practices, info-lunches and seminars will continue to be held.



These steps are also aimed at improving the capability of government to use a broad-based and strategic public opinion research process in the development of policies, programs and services.

There continues to be a need to strengthen management's knowledge of, and reliance on public opinion research across government departments. Some departments and agencies have dedicated resources to coordinate public opinion research, while others coordinate their projects concurrently with other departmental activities. Public opinion research findings are not always fully exploited in the development of policy and programs.

There is a wealth of knowledge on public opinion in most departments, but research is often fragmented and efforts to synthesize the information are sporadic. In short, there is a need across the Government of Canada for greater consistency in the use, coordination and integration of POR in management processes.

The Research Branch and its partners across government are striving to resolve these issues. For example, the Research Branch is working to become a centre of expertise in knowledge management pertaining to public opinion research. With its work in coordination, outreach, corporate research and applied research, this is well underway.

SURVEY RESEARCH ASSOCIATIONS UNANIMOUS IN SUPPORT FOR GOVERNMENT REFORMS

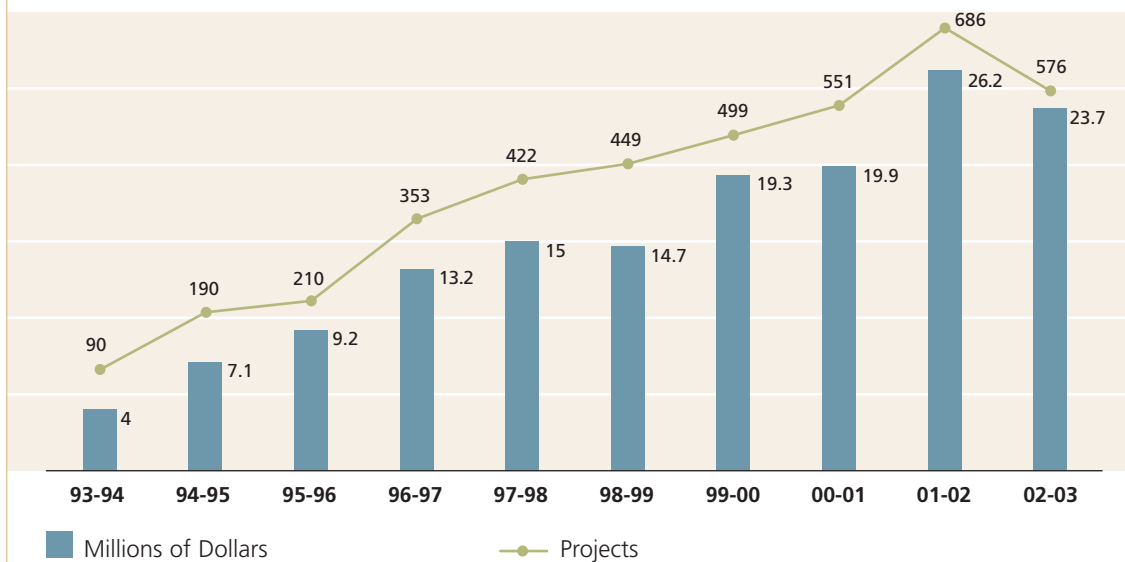
OTTAWA, June 12/CNW – The four industry associations representing market and survey research in Canada expressed unanimous support today for the Government of Canada's announced changes to its public opinion research contracting process.

The joint expression support followed industry consultations held by senior government executives with the Presidents of l'Association de la recherche marketing et sociale, the Canadian Association of Marketing Research Organizations, the Professional Marketing Research Society, and the Canadian Survey Research Council.

Source: Survey Research Associations Unanimous in Support for Government Reforms News Release, June 12, 2003.

4. *Overview of Public Opinion Research in 2002–2003 in the Government of Canada*

ANNUAL TOTAL INVESTMENT IN PUBLIC OPINION RESEARCH



Public opinion research findings are key to making many significant government decisions that require regular and extensive soundings from the Canadian population on issues as diverse as smoking, immigration, and small business operations. The result has been an increasing demand for research using a variety of techniques such as telephone surveys, mail-back questionnaires, and in-depth interviews.

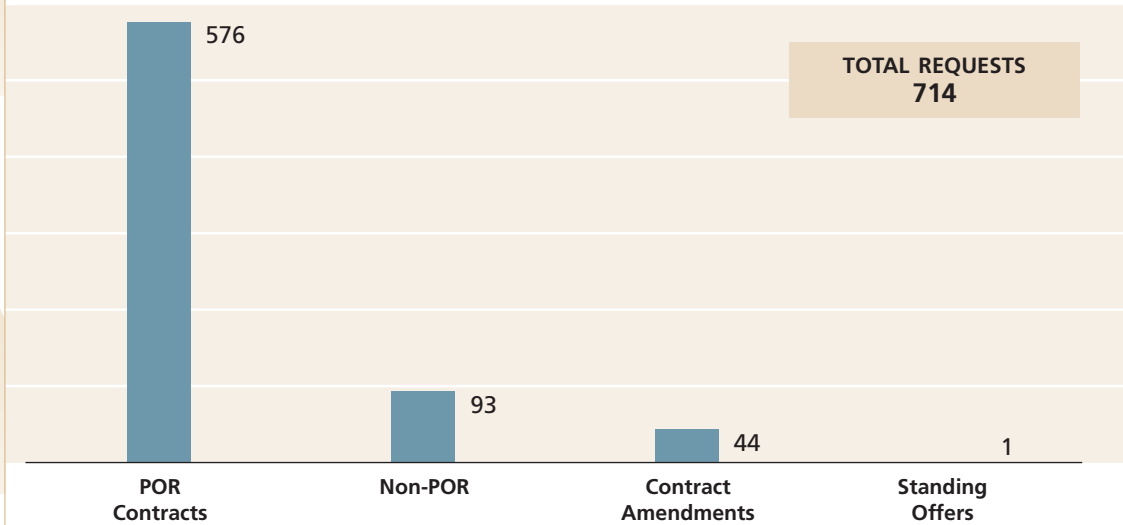
This demand has been manifested by business volume: For the fourth consecutive year, volume totalled or exceeded \$20 million—the four busiest years on record. The 2002–2003 value of \$23.7 million is the second highest. This growing reliance on public opinion research has also provided an opportunity to coordinate and share research to achieve maximum cost effectiveness.

The 2002–2003 activity (576 projects) was slightly lower than 2001–2002 (686 projects, including contract amendments) as was the dollar value.

Health Canada and Human Resources Development Canada accounted for 27 percent of the research investments.

OVERALL BUSINESS VOLUME – ADVISORY SERVICES

Nature of Requests for 2002–2003



Communication Canada is the coordinating authority for all public opinion research. This table provides an overview of the work undertaken by the Government of Canada through the Communication Canada's Research Branch. Departments and agencies submit their project summaries to Research Branch advisors who then determine whether a project falls within the definition of POR*. If it does, the project is registered and advisors offer guidance throughout the entire research process. If the project does not fall within the definition of public opinion research, departments undertake the project independently.

In 2002–2003, 576 projects fell within the POR definition, another 93 did not. There were 44 contract amendments for changes ranging from delivery dates to the scope of work and budgets.

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

TOP 10 DEPARTMENTS AND AGENCIES FOR ALL PUBLIC OPINION RESEARCH BY BUSINESS VOLUME

DEPARTMENT/AGENCY	THOUSANDS OF DOLLARS	NUMBER OF PROJECTS
Health Canada	4,270	81
Communication Canada	3,176	75
Human Resources Development Canada	2,120	60
Natural Resources Canada	1,586	28
Industry Canada	1,584	42
Canadian Heritage	1,124	30
Foreign Affairs and International Trade Canada	870	16
Canada Customs and Revenue Agency	868	17
Treasury Board of Canada Secretariat	738	15
Environment Canada	710	20

Health Canada led all federal departments and agencies in public opinion research, accounting for about 18 percent of the Government of Canada's public opinion research expenditures. Much of its activity related to the Tobacco Control Strategy. Six departments each spent more than \$1 million on public opinion research, representing more than 58 percent of the total Government of Canada investment.

Highlights of the research undertaken by the 10 largest users of public opinion research appear in Section 5.

INVESTMENT IN PUBLIC OPINION RESEARCH FROM 2000 TO 2003

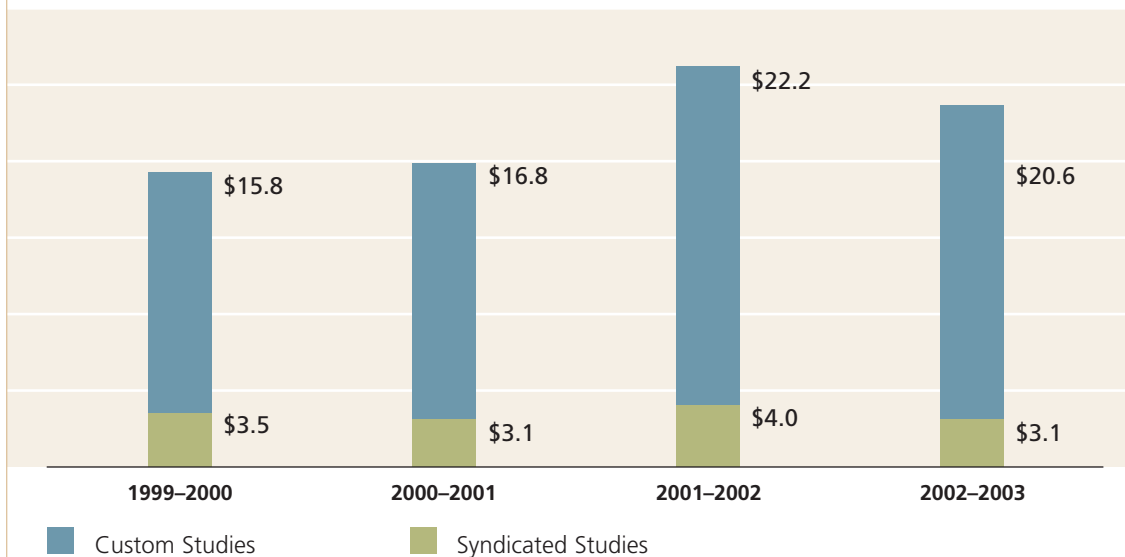
(THOUSANDS OF DOLLARS)

DEPARTMENT/AGENCY	2000–2001		2001–2002		2002–2003	
	VALUE \$	NO. OF PROJECTS	VALUE \$	NO. OF PROJECTS	VALUE \$	NO. OF PROJECTS
Health Canada	2,300	62	4,036	88	4,270	81
Communication Canada	2,105	60	2,117	70	3,176	75
Human Resources Development Canada	2,556	68	2,614	62	2,120	60
Natural Resources Canada	387	13	847	32	1,586	28
Industry Canada	1,439	45	1,834	54	1,584	42
Canadian Heritage	849	29	1,288	36	1,124	30
Foreign Affairs and International Trade Canada	514	17	867	18	870	16
Canada Customs and Revenue Agency	1,008	19	687	23	868	17
Treasury Board of Canada Secretariat	1,027	17	1,228	16	738	15
Environment Canada	810	24	1,343	36	710	20

Although the overall investment in public opinion research was reduced by about 10 percent in 2002–2003 from the previous year, some departments were more active. Natural Resources Canada had the largest percentage increase—more than 80 percent. Communication Canada invested 50 percent more than the previous year. Health Canada was up nearly six percent.

COMPARISON OF CUSTOM AND SYNDICATED STUDIES

(MILLIONS OF DOLLARS)



Custom public opinion research is work that a department or agency commissions from a private firm. The resulting products, data or reports are tailored to the specific research needs of the department or agency. The commissioning organization ensures the intellectual property of reports and other materials generated by the project, which are made available to the public.

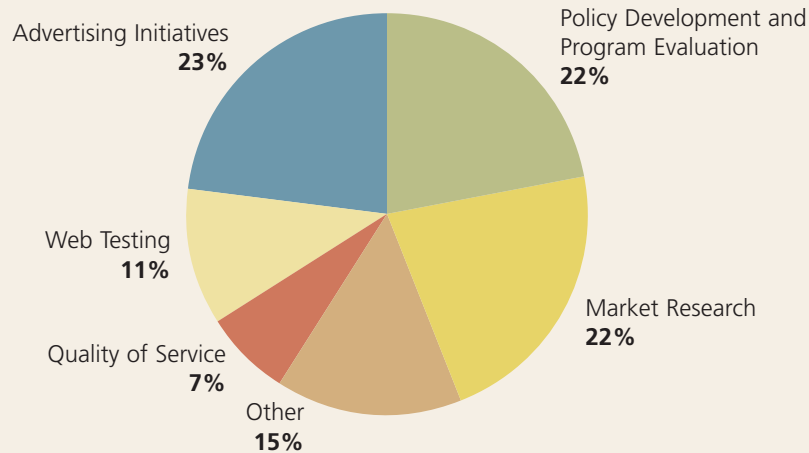
Custom research reports commissioned by the Government of Canada are in the public domain. This means that the information gathered is made available to other departments, the private sector and the public at large. Custom research accounts for the bulk of the work undertaken on behalf of the Government of Canada.

Syndicated research is owned by the research firm but offers subscribers a wide range of data on specific topics such as public affairs issues. This type of research is economical because overhead costs are shared. The syndicated research findings also include trend information.

Departments purchase subscriptions to the research results and are prohibited from distributing the information to any other parties including other government departments. Departments purchased \$3.1 million in subscriptions to syndicated research last year.

In 2002-2003, about 13 percent of the public opinion research investment was for syndicated research compared with 15 percent the previous year.

TYPE OF RESEARCH AS A PERCENTAGE OF TOTAL INVESTMENT IN PUBLIC OPINION RESEARCH

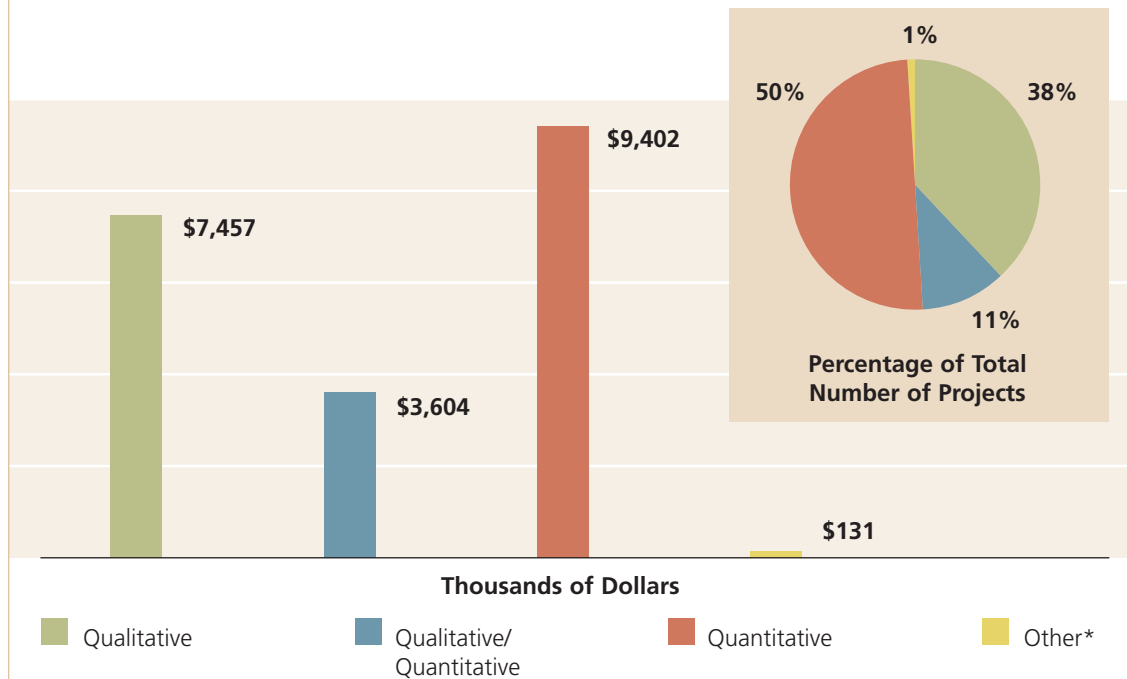


Advertising research, which includes advertising tracking and testing, as well as communications product testing, showed the largest year-over-year growth in the types of research undertaken by the Government of Canada. These activities accounted for 23 percent of the investment compared with 17 percent the previous year.

Market research accounted for 22 percent of the total expenditures, down from 31 percent the previous year. Market research encompasses projects such as the benchmarking survey of Japanese Food Consumers. Agriculture & Agri-Food Canada commissioned this research to better understand consumers' preferences and behaviour in this key market, as well as their views of Canada as a food producer/processor, thus helping Canada brand itself as a producer/supplier of "premium" food in the global marketplace. Policy development and evaluation, quality of service, and Web testing remained at, or near, the same levels of investment in the last two years. The category "Other" included such research as a baseline tracking survey, omnibus questions and research design studies.

PERCENTAGE OF PROJECTS AND TOTAL INVESTMENT BASED ON THE RESEARCH METHODOLOGY FOR CUSTOM RESEARCH

Research Methodologies Used for Public Opinion Research



Qualitative, and a combination of qualitative and quantitative research accounted for about half of the total public opinion research investment in 2002–2003. Quantitative research accounted for virtually all of the balance. The “other” category included such research as questionnaire design and analysis.

QUALITATIVE RESEARCH This refers to information obtained about some members of a target population through unstructured or semi-structured procedures, such as discussions, observations or interviews. No projections of results to the target population can be made from this type of research.


QUANTITATIVE RESEARCH This refers to information obtained about some or all members of a target population through structured procedures, such as a census or a survey, allowing conclusions to be made from the total target population.

Source: Research Techniques: Guideposts to Value, Communication Canada, April 2003.



TARGET POPULATIONS OF PUBLIC OPINION RESEARCH

Nearly half of the public opinion research projects in 2002–2003 involved the general population, reflecting the constituencies of the largest POR users such as Health Canada. Other research became more focused as departments and agencies sought information and views from specific client groups of people ranging from seniors to immigrants to businesses. Public servants were also the subject of some research projects assessing issues such as organizational effectiveness, service delivery and use of official languages. Another group of interest to several departments is the country’s “opinion leaders”, known by the research industry as involved Canadians.



“Involved Canadians” is a proprietary segmentation developed by Earncliffe Research and Communications designed to help its clients observe the formation of market, political and issue trends, and develop appropriate strategic responses. These Canadians are the country’s opinion leaders. They read, listen, and talk about public affairs issues in a much greater frequency and intensity than the rest of the population. They tend to join community organizations and political parties and they express their views through radio phone in shows and letters to the editor.



5. *Highlights Of Key Public Opinion Research Projects*


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

HEALTH CANADA

A particularly innovative public opinion research project at Health Canada in 2002–2003 focused on youth. Consultation with experts in the field of marketing to youth led the Department to conclude traditional research methods were inadequate. This was especially true when designing anti-tobacco campaigns, given that smoking is seen by youth as a means of rebellion or a way of establishing one's personality, identifying with a peer group or appearing "grown up."

In designing Health Canada's second-hand smoke campaign directed at youth, a number of public opinion research approaches were used to elicit attitudes, beliefs, opinions and feelings. In addition to focus groups, triads, and surveys, the department capitalized on youth's affinity with the Internet to conduct a series of dynamic on-line discussions with two specific groups of teens. This interactive forum allowed young people to discuss issues related to tobacco use over a period of several days. The information collected was instrumental in the development of one of Health Canada's most successful youth campaigns to date.


Much of Health Canada's POR in 2002–2003 supported the Tobacco Control Strategy, a \$480 million initiative to reduce tobacco use in Canada. This focus on tobacco-related issues is expected to continue in the next fiscal year, as will the need for research on health care and other emerging issues such as SARS and the West Nile Virus. New research efforts will look at our Healthy Living Strategy and the Communicating Science initiative.



Health Canada's public opinion research also examined a wide range of other issues, including:

- an evaluation of the diabetes advertising campaign;
- a survey of journalists to improve media relations strategies;
- a survey of Aboriginal women's attitudes relating to healthy pregnancy; and
- a study of the impact of the toxic constituents listed on cigarette packages.

COMMUNICATION CANADA



Research is crucial for crafting successful initiatives in today's competitive and complex communications environment. In improving communications between the Government of Canada and Canadians, Communication Canada places great importance on research, namely with its *Listening to Canadians* studies, conducted three times a year to monitor the nation's perceptions on government priorities and other current issues.

Research in 2002–2003 dealt mainly with the following issues:

- evaluating major advertising campaigns (access points, service guides and other campaigns), external relations activities (fairs and exhibits) and certain activities at government access points (Canada Site and 1 800 O-Canada);
- support for regional communication initiative efforts, including the success of pilot projects in Saskatchewan and New Brunswick and the development of a regional communication tool for each Atlantic province; and
- research of a more corporate nature, occasionally in partnership with other federal departments, for the purpose of improving communication between the government and Canadian citizens, including issues related to communication and literacy, social values and Aboriginal peoples.

HUMAN RESOURCES DEVELOPMENT CANADA

Human Resources Development Canada conducted public opinion research on many of its programs and services such as Employment Insurance, the Canada Pension Plan, Old Age Security, the Canadian Education Savings Grant, the Canada Student Loan Program and the Labour Program.

The skills and learning agenda was a prominent issue for investigation through public opinion research. In August, a key study encompassed a series of 14 focus groups conducted in five locations across the country to gather perceptions, experiences and intentions in respect of life-long learning. It also sought insight into the preferred role for the federal government from members of the labour force and owners/managers of small and medium-sized enterprises.

The results from this study and others contributed to policy development and supported communications activities on how best to inform the Canadian population of the Skills and Learning Initiative.

Future public opinion research will be driven largely by issues related to modernizing services, children and their families, the skills and learning agenda, and employment benefits and support measures, in addition to tracking information on established programs.

NATURAL RESOURCES CANADA

A significant measure of public opinion research at Natural Resources Canada (NRCan) was conducted in the areas of energy use and technology, energy efficiency and, in collaboration with Environment Canada, climate change. Among the key projects this year was the qualitative evaluation of a Government of Canada “look” for climate change communications products and the adaptation of this look to advertising for related departmental programs (e.g., EnerGuide).

Public opinion research at NRCan involved a range of custom and syndicated projects in areas of policy and program development, communications planning and evaluation, Web site evaluation, and client satisfaction research. The Department also continued its use of syndicated studies to enhance its public environment intelligence.

NRCan used the Government of Canada’s Advertising Campaign Evaluation Tool (ACET) to post-test three separate phases of a significant climate change advertising campaign in the period September 2002 to March 2003. The use of ACET for major campaign evaluation, and the use of the Service Improvement Initiative’s Common Measurement Tool (CMT) for client satisfaction measurement, is becoming standard practice.

INDUSTRY CANADA

Industry Canada’s public opinion research program in 2002–2003 included research in support of the Government of Canada’s innovation agenda, advancing Government On-Line through Web site development and evaluations, client satisfaction and service improvement studies, research on consumer protection issues, and the first Industry Canada annual poll—a benchmark and tracking study with businesses and the general public on Industry Canada’s priorities and performance.

Industry Canada also participated in a number of horizontal research initiatives such as continuing policy and communications research in the areas of biotechnology and modern comptrollership.

CANADIAN HERITAGE

One of the public opinion research projects undertaken by Canadian Heritage in 2002–2003 was a qualitative and quantitative project in the Aichi region of Japan. The research project included a survey of Japanese people on their expectations of the Canadian Pavilion at the 2005 World Exposition. Canadian Heritage took advantage of the opportunity afforded by this study to ask questions related to respondents' knowledge of, and interest in, Canada.

Another significant project involved surveying Canadians about official languages. The project consisted of two parts: a representative national survey of the population and a survey of linguistic minority populations (i.e., Francophones outside Quebec and Anglophones in Quebec). Particular attention was paid to developing the sample among linguistic minorities in an attempt to obtain the most accurate picture of the current situation and needs of these groups.

Canadian Heritage evaluated existing Web sites and those in development, as the Department is the host, or supporting site, of a number of Web sites and portals that aim to promote culture, the arts and Canadian diversity (e.g., the Virtual Museum of Canada, Culture.ca).

Plans for the 2003–2004 fiscal year include a second survey on participation in, and access to, Canadian arts and heritage as well as playing an active role in interdepartmental survey activities regarding Aboriginal peoples living on and off reserve.

FOREIGN AFFAIRS AND INTERNATIONAL TRADE CANADA

The Department of Foreign Affairs and International Trade (DFAIT) has an ongoing requirement to assess Canadian public opinion on security, branding Canada, departmental communications, foreign policy, the department's image and international trade. In supporting this mandate, DFAIT conducted quantitative, qualitative and on-line research on policy, trade services and communications.

The findings were used to gauge the effectiveness of government policies and programs, electronic communications and recognition of Canada at international trade shows. There was also a need to identify the public environment in which communications strategists must operate.

The Department's flagship project is the annual International Trade Tracking Survey, which has been undertaken annually for the past five years. The findings show that although Canadians are not as optimistic about the economy as they have been in previous years and have feelings of insecurity about the Canada–U.S. relationship, 80 percent of respondents believe trade is good for the economy. Respondents were more likely to say

(by a wide margin) that large corporations benefit more from international trade than do small and medium-sized enterprises and businesses in their communities. Most notably, responses to questions about trade in general invoked positive responses that were consistent with previous findings. When trade questions were framed within the context of the Canada–U.S. trade relationship, Canada was perceived as a victim.

CANADA CUSTOMS AND REVENUE AGENCY

The Canada Customs and Revenue Agency (CCRA) Annual Survey, designed to track key indicators of awareness, perceptions and satisfaction, was conducted for the third time. In the future, CCRA expects to conduct an increasing number of stakeholder satisfaction studies as part of its Balanced Scorecard approach to performance measurement. This will include a national random survey of the CCRA Web site visitors.

Many CCRA public opinion research projects fell into four themes in 2002–2003:


- the CCRA Web site
- national advertising
- publications
- quality of service.

Notable trends included increases in Web site usability testing and larger-scale quantitative surveys.

TREASURY BOARD OF CANADA SECRETARIAT

A key project for the Treasury Board Secretariat was focus group testing of its redesigned Web site. The look, ease of navigation, accessibility and the organization of the information were tested by its key audiences including public servants, stakeholders and parliamentarians. The research objective was to gather feedback and observations as to the efficiency of the new format. The qualitative research will result in a tool to evaluate the redesign and a basis for any future improvements to the site.

The Government on-Line (GOL) Research panel consists of a representative sample of Canadian Internet users, tracked over time for their views on a series of on-line issues of common concern across Government. Three specific research projects were conducted with the panel members this year: an on-line survey, with 4,547 responses; five on-line focus groups; and a second on-line survey, with over 2,500 responses. Specific issues covered included functionality and navigation of Government Web sites; privacy, security, authentication and information sharing in an on-line environment; electronic democracy and citizen engagement; pre-testing of Web site designs and mock-ups; and effectively communicating GOL services.



In addition to the panel research, focus group and interview research was conducted with Internet users across the country to more fully understand Canadians' impressions of privacy, security and information-sharing issues in relation to GOL services. It also tested a model of the epass system, which is the Government's on-line authentication tool, as well as communications messages and approaches for GOL.

ENVIRONMENT CANADA

One of Environment Canada's key projects, implemented in cooperation with Natural Resources Canada and other federal agencies, involved ongoing POR to track attitudes on issues related to climate change and the Kyoto Protocol. During the period surrounding the ratification of the Protocol, research revealed Canadians' concerns about climate change and steady support for Kyoto. It also indicated that, while Canadians' level of awareness was uneven, vast majorities were in favour of engaging in the process and taking a number of personal actions to reduce their greenhouse gas emissions. The findings were instrumental in guiding federal communications and policy efforts.

Other POR initiatives were designed to support the business lines of conservation, protection and meteorology, as well as ongoing management and human resource efforts internal to the Department. In particular, Environment Canada commissioned research to test and evaluate products, services and advertising, to gauge client satisfaction and to measure public attitudes on a range of issues using syndicated and custom research products.

In 2003–2004, Environment Canada plans to explore public attitudes on topics such as clean air, toxics, nature/conservation and species at risk, and climate change, including the One Tonne Challenge. Among other things, this research will examine public attitudes to climate change and willingness to engage in activities to reduce greenhouse gas emissions, public preferences for various environmental regulatory approaches, and Canadians' attitudes and awareness of federal initiatives in the area of species and nature.

The Meteorological Service of Canada also has a busy public opinion research agenda, much of which is used to assess public use of, and satisfaction with, its breadth of highly visible, high-volume, weather-related products and services. This information helps track progress against Environment Canada's 10 percent improvement commitments within the Service Improvement Initiative.

6. *Highlights of Syndicated Studies*

INVESTMENT IN SYNDICATED STUDIES

SYNDICATED STUDY (FIRM)	DEPARTMENTAL SUBSCRIPTIONS	TOTAL DOLLARS FOR ALL DEPARTMENTAL SUBSCRIPTIONS (THOUSANDS OF DOLLARS)
The Ipsos Trend Report Canada (Ipsos-Reid)	13*	122
Rethinking Government (Ekos Research Associates)	12	360
Public Security Monitor (Ekos Research Associates)	9*	220
Focus Canada (Environics Research Group)	9	189
Reconnecting Government with Youth (Ipsos-Reid)	8	288
Rethinking the Information Highway (Ekos Research Associates)	7	321
Rethinking North America (Ekos Research Associates)	5	209
Perspectives Canada (Perspectives Canada)	5	114
Global Issues Monitor (Environics International)	5	33
Corporate Social Responsibility Monitor (Environics International)	5	26
2002 International Environmental Monitor (Environics International)	4	32
Québec 360 (Les Études de Marché Créatec +)	3	158

INVESTMENT IN SYNDICATED STUDIES (CONTINUED)

SYNDICATED STUDY (FIRM)	DEPARTMENTAL SUBSCRIPTIONS	TOTAL DOLLARS FOR ALL DEPARTMENTAL SUBSCRIPTIONS (THOUSANDS OF DOLLARS)
3SC (CROP and Environics Research Group)	3	121
North of 60 Monitor (Environics Research Group)	3	77
Public Safety and Security in the New Millennium: One Year Later (Ipsos-Reid)	3	70
The Business Agenda (Compas)	3	56

Government departments and agencies subscribed to syndicated studies undertaken by 18 different research firms during the year. Some departments purchased subscriptions to the same study for the 2003–2004 fiscal year as well but, since the investment was made in 2002–2003, it is reflected in this table (*).

The Ipsos Trend Report Canada headed the list in the number of subscriptions. Studies relating to youth and on trends were also heavily used. The Government of Canada's largest expenditure in syndicated studies was for the research associated with *Rethinking Government*.

A thematic overview of syndicated studies is provided in Appendix Three, page 40.

7. *Research Firms Rankings*

RESEARCH FIRMS FOR ALL PUBLIC OPINION RESEARCH BY BUSINESS VOLUME

FIRM	THOUSANDS OF DOLLARS	NUMBER OF PROJECTS
Ekos Research Associates	4,095	100
Ipsos-Reid	3,581	91
Environics Research Group	3,048	64
Les Études de Marché Créatec +	2,086	29
Compas	1,552	41
GPC Factor Research Group	1,184	19
Phase 5 Consulting Group	1,125	22
Goldfarb Consultants	929	20
Decima Research	924	24
Pollara	690	14

In 2002–2003, the Government of Canada used the services of 74 research firms to fulfill its public opinion research needs. Ekos Research Associates headed the list both in the number of projects and the dollar value. Ipsos-Reid came second, while Environics Research Group came third. A complete listing of all the firms can be found in Appendix Two on page 37.



RESEARCH FIRMS FOR SYNDICATED STUDIES BY BUSINESS VOLUME

FIRM	THOUSANDS OF DOLLARS
Ekos Research Associates	1,202
Ipsos-Reid	588
Environics Research Group	266
Les Études de Marché Créatec +	158
Environics International	138
Institute of Public Administration of Canada	134
CROP	121
Perspectives Canada	114
Earncliffe Research and Communications	80
Compas	67

Ekos Research Associates' syndicated studies accounted for nearly 40 percent of the investment by the Government of Canada. Ipsos-Reid placed second with the Environics Research Group third.

RESEARCH FIRMS FOR CUSTOM RESEARCH BY BUSINESS VOLUME

FIRM	THOUSANDS OF DOLLARS	NUMBER OF PROJECTS
Ipsos-Reid	2,993	59
Ekos Research Associates	2,892	63
Environics Research Group	2,782	51
Les Études de Marché Créatec +	1,927	26
Compas	1,485	35
GPC Factor Research Group	1,184	19
Phase 5 Consulting Group	1,125	22
Decima Research	924	24
Goldfarb Consultants	869	18
Sage Research	664	16

Although Ekos Research Associates had the most custom research projects (63), the dollar value was slightly lower than Ipsos-Reid, which undertook 59 projects. Close behind with 51 projects was Environics Research Group.

APPENDICES





Appendix One

COMPLETE LISTING OF DEPARTMENTS AND AGENCIES BY BUSINESS VOLUME

DEPARTMENT/AGENCY	THOUSANDS OF DOLLARS	NUMBER OF PROJECTS
Health Canada	4,270	81
Communication Canada	3,176	75
Human Resources Development Canada	2,120	60
Natural Resources Canada	1,586	28
Industry Canada	1,584	42
Canadian Heritage	1,124	30
Foreign Affairs and International Trade Canada	870	16
Canada Customs and Revenue Agency	868	17
Treasury Board of Canada Secretariat	738	15
Environment Canada	710	20
Agriculture and Agri-Food Canada	624	15
Citizenship and Immigration Canada	528	17
Canada Investment and Savings	521	9
Indian and Northern Affairs Canada	515	17
Transport Canada	476	13
National Defence	471	9
Finance Canada	449	8
Department of Justice Canada	356	13
Privy Council Office	300	9
Parks Canada	216	7
Fisheries and Oceans Canada	215	7
Public Works and Government Services Canada	195	5

COMPLETE LISTING OF DEPARTMENTS AND AGENCIES BY BUSINESS VOLUME (CONTINUED)

DEPARTMENT/AGENCY	THOUSANDS OF DOLLARS	NUMBER OF PROJECTS
Office of Critical Infrastructure Protection and Emergency Preparedness Canada	195	3
Veterans Affairs Canada	173	5
Canadian Food Inspection Agency	152	6
Canadian International Development Agency	147	7
Public Service Commission	145	6
Solicitor General	132	4
Transportation Safety Board of Canada	102	1
Investment Partnerships Canada	100	1
Canadian Grain Commission	95	1
National Research Council Canada	70	4
Library of Parliament	66	1
Canada Economic Development	64	3
Multiple departments*	59	2
Governor General of Canada	55	1
Royal Canadian Mounted Police	54	2
Correctional Service of Canada	51	2
FedNor Program	35	4
Canadian Space Agency	27	2
Atlantic Canada Opportunities Agency	27	1
Canadian Institute of Health Research	25	1
Canadian Radio Television and Telecommunications Commission	24	1
Western Economic Diversification Canada	21	4
Statistics Canada	8	1

* This investment is part of the bulk buy of selected syndicated studies by some interested departments.

Appendix Two

COMPLETE LISTING OF RESEARCH FIRMS BY BUSINESS VOLUME

FIRM	THOUSANDS OF DOLLARS	NUMBER OF PROJECTS
Ekos Research Associates	4,095	100
Ipsos-Reid	3,581	91
Environics Research Group	3,048	64
Les Études de Marché Créatec +	2,086	29
Compas	1,552	41
GPC Factor Research Group	1,184	19
Phase 5 Consulting Group	1,125	22
Goldfarb Consultants	929	20
Decima Research	924	24
Pollara	690	14
Sage Research	664	16
Patterson, Langlois Consultants	474	13
Léger Marketing	371	2
Maskery & Associates	241	1
Binarius Research Group	199	3
Delta Media	185	6
CROP	162	6
D-Code	151	6
Environics International	138	9
PriceWaterhouseCoopers	137	4
Habart & Associates Consulting	136	1
Earnscliffe Research and Communications	128	4
Circum Network	98	4

COMPLETE LISTING OF RESEARCH FIRMS BY BUSINESS VOLUME (CONTINUED)

FIRM	THOUSANDS OF DOLLARS	NUMBER OF PROJECTS
Corporate Research Associates	81	6
Perspectives Canada	80	4
Institute of Public Administration of Canada	80	2
ViewStats Research	80	1
Earl Berger	54	1
Institute for Citizen-Centered Service	54	1
Public Policy Forum	50	2
Vision Research	45	3
The Strategic Counsel	45	2
SQM Group	44	5
Ad Hoc Marketing	41	2
Youth Culture	40	2
CATA	36	2
Western Opinion Research	29	2
Hay Group Limited	28	2
PeopleWatch Canada	26	2
Dr. Suren Kulshreshtha	25	1
Carol Motuz and Company	25	1
University of Victoria	25	1
Samson & Associates	25	1
Genesis Public Opinion Research	25	1
Strathmere Associates International	25	1
Performance Management Network	25	1
Sierra Systems	25	1
Natalie Kischuk	25	1
Venture Communications	24	1
Alexander Tyakoff	24	1

COMPLETE LISTING OF RESEARCH FIRMS BY BUSINESS VOLUME (CONTINUED)

FIRM	THOUSANDS OF DOLLARS	NUMBER OF PROJECTS
Whiteduck Resources	24	1
Bristol Group	24	1
MALKAM Cross-Cultural Training	24	1
Response Advertising	24	1
Garven & Associates Management Consultants	23	1
Global Strategic Communications/CCL	22	1
Canada West Foundation	21	1
Saskatchewan Indian Federated College	21	1
Yale Bélanger Consultant	21	1
Keystep Growth & Finance	21	1
Pharmahorizons	21	1
Goss, Gilroy & Associates	18	1
Prairie Research Associates	13	2
Cultural Policy Research and Analysis	11	1
Conference Board of Canada	11	1
Poirier Communications	10	1
Kentaero Learning Systems	10	2
Marie-Hélène Courtade	9	1
Fast Consulting	7	1
Seer Research & Marketing	7	1
The Centre for Excellence in Communications	6	1
Simhan Research Associates	6	1
Criterion Research Corp	3	1
The Gallup Organization	0.15	1



Appendix Three

THEMATIC OVERVIEW OF SYNDICATED STUDIES IN 2002–2003

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

National Public Opinion Overviews:

3SC (CROP and Environics Research Group)
Environmental Monitor (Environics International)
Focus Canada (Environics Research Group)
Goldfarb Report (Goldfarb Consultants)
Perspectives Canada (Perspectives Canada)
Rethinking Government (Ekos Research Associates)
Rethinking Citizen Engagement (Ekos Research Associates)
The Ipsos Trend Report Canada (Ipsos-Reid)

Regional Reports:

Alberta Reid Report (Ipsos-Reid)
Atlantic Omnibus Report (Corporate Research Associates)
BC Reid Report (Ipsos-Reid)
North of 60 Monitor (Environics Research Group)
Ontario Trend Report (Ipsos-Reid)
Options for Western Canada (Ipsos-Reid)
Québec 360 (Les Études de Marché Créatec +)

High Technology and Innovation:

The Dual Digital Divide: Inclusion and Understanding Barriers (Ekos Research Associates)
Rethinking the Information Highway (Ekos Research Associates)

International Issues:

Corporate Social Responsibility Monitor (Environics International)
Food Issues Monitor (Environics International)
Gallup Poll Tuesday Briefing ePublication (The Gallup Organization)

Global Issues Monitor (Environics International)
International Environmental Monitor (Environics International)
Rethinking North American Integration (Ekos Research Associates)
World Monitor (Ipsos-Reid)

Security:

Issues Surrounding Flight Safety and Security (Ekos Research Associates)
Public Safety and Security in the New Millennium (Ipsos-Reid)
Public Security Monitor (Ekos Research Associates)

Youth Issues:

Reconnecting Government with Youth (Ipsos-Reid)
Trendscan: Report on Teen Lifestyles (Youth Culture)

Health Issues:

Berger Population Health Monitor (Earl Berger)
Food for Thought (Compas)

Business/Economic Issues:

The Business Agenda (Compas)
Investment Location Intentions Among Canadian Business
(Earncliffe Research and Communications)
Monthly Index of Consumer Attitudes (Conference Board of Canada)
Privacy and Money (Compas)
Taking Care of Business (Institute of Public Administration of Canada)

Aboriginal Issues:

Aboriginal Labour Force Engagement in Western Canada (Canada West Foundation)
Public Views Regarding Aboriginal Peoples (Ipsos-Reid)

Other Topics:

Civic Engagement Among the Information Age Generations (D-Code)
SheWatch (PeopleWatch Canada)



Notes