

Communication

Canada



**Public Opinion Research in
the Government of Canada**

Annual Report

2001-2002

Annual Report

Public Opinion Research in the Government of Canada

2001-2002

Prepared by Communication Canada

Research Branch



Direction générale de la recherche

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For more information, please contact the
Research Branch at (613) 943-5130.
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Preface

In line with the Government of Canada's commitment to transparency, I am pleased to present the first annual report summarizing public opinion research projects undertaken by government departments and agencies. This report presents an overview of the wide variety of research projects undertaken by the Government over the past year to ensure programs and services better respond to the needs of all Canadians.

Communication Canada provides a management oversight and centre of expertise role for all public opinion research undertaken by the Government of Canada. Our team of experts assists departmental clients throughout the entire process to ensure their research objectives are met and the research undertaken conforms to Government of Canada policies and market research industry standards. Communication Canada also facilitates access to research results and promotes the sharing of findings and best practices within the government research community.

Our central role in research is key to fulfilling Communication Canada's mandate to improve communications between the Government of Canada and Canadians. The research initiatives across departments and agencies support the Government's commitment to consult and engage Canadians in order to improve services and develop relevant policies and programs.

I hope you will find the attached snapshot of the diverse research projects undertaken across the Government of Canada useful and that you will take advantage of Communication Canada's services to assist you with your future projects.

Ralph Goodale
Minister Responsible for Communication Canada

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Introduction

Listening is a vital part of communication. This includes listening to the needs and opinions of those with whom you communicate so that you can respond to their needs, listening so that you communicate in a way that they will hear, listening to whether your message has been heard, and actively listening. Public opinion research is vital to the Government of Canada because it is one of the ways that the Government listens to Canadians.

Communication Canada is pleased to present the first annual report on public opinion research within the Government of Canada. As part of its mandate to improve communications between the Government of Canada and Canadians, Communication Canada plays a key role in coordinating the Government's public opinion research. This report provides an overview of the growing number of research projects coordinated by Communication Canada to help departments and agencies fulfill their research needs. It also highlights trends in research across the Government of Canada.

This year, Communication Canada coordinated, on behalf of the Government of Canada, 686 research projects* for a total cost of \$26.2 million. Of this, \$4 million was spent on departmental subscriptions to syndicated studies and the remainder, \$22.2 million, was devoted to custom research. This fiscal year the Government of Canada contracted 83 firms for its public opinion research.

Communication Canada

As stated in the new Communications Policy of the Government of Canada, which came into effect April 1, 2002, Communication Canada is the technical and coordinating authority for Government of Canada public opinion research. As such, the Research Branch, through the Coordination and Advisory Services - Public Opinion Research Directorate (CASPORD), facilitates public opinion research studies by guiding departments throughout the entire research process to ensure their objectives are met.

The Research Branch also undertakes communications research, including the *Listening To Canadians* surveys, which are conducted three times a year. The results of these surveys are shared throughout the Government of Canada to increase understanding of societal trends, issues and events affecting government communications. The reports generated from the *Listening To Canadians* surveys are available on Communication Canada's Web site.

* The numbers in this report are based on information submitted to Communication Canada by departments for projects that are identified and treated as public opinion research as per the definition in the Communications Policy of the Government of Canada.

Public Opinion Research Resources and Tools

Communication Canada's advisors are ready to help departments work their way through any public opinion research problem. In addition, there are a number of tools and resources that have been established to help facilitate the public opinion research process within the Government. A brief description of each of these resources is provided below.

Orientation Guide

Public Opinion Research in the Government of Canada: An Orientation Guide is a resource for any Government of Canada employee involved in conducting public opinion research. In essence, this guide explains the process and players involved in conducting public opinion research within the Government of Canada. The guide should make the process of conducting public opinion research clearer.

The guide offers readers a definition of what public opinion research is for the purposes of the contracting process within the Government. Conversely, the guide also discusses what types of research are not considered to be public opinion research.

A number of different organizations are involved in public opinion research within the Government including the client department or agency, Communication Canada, Public Works and Government Services Canada (PWGSC) and the research firm. Readers of the guide will find an explanation of the roles of each of these organizations in the process.

The guide also includes an outline of a project summary and a description of the advertising and public opinion research (APOR) planning system. The guide also includes a section on best practices, which outlines the practices public servants should follow at each stage of the research process. The guide is available electronically at the CommNET Extranet site (<http://commnet.gc.ca>) and in hard copy from Communication Canada Research Branch.

Public Opinion Research on the CommNET

CommNET, Communication Canada's Extranet site for government communicators, contains a section on public opinion research, which all public servants involved in public opinion research should find helpful. The site includes a listing of advisors and the departments and agencies that each advisor works with, as well as a searchable list of more than 2500 Government of Canada public opinion research reports submitted since 1994, which have been deposited in the National Library of Canada and the Library of Parliament. The list is updated regularly. Copies of these reports can be accessed using inter-library loan through departmental or local libraries or from Communication Canada.

The site also contains several sections for those who are new to the public opinion research process. Users of the site will find an outline of the public opinion research summary that should be completed each time a department wishes to initiate a public opinion research contract.

Finally, the site contains a link to a section on Communication Canada's Web site that is dedicated to the communication surveys of the Research Branch. The Research Branch of Communication Canada undertakes communications research, such as *Issues and Challenges in Communicating with Less Literate Canadians* and *Listening to Canadians*.

On-line Access to Projects

There has been an increasing demand among government employees for easier access, preferably on-line, to the custom public opinion research being done by departments and agencies. As a result, Communication Canada is developing a pilot project for a new on-line process. Under this process, departments and agencies would submit details of planned research electronically. Public Service employees would be able to access summary information of these projects on an Extranet site.

Public Opinion Research Committees and Groups

Directors General Committee on Public Opinion Research

In spring 2001, directors general of communications struck a committee on public opinion research. The committee is co-chaired by Sheila Watkins, Director General, Communications, Health Canada, and Laurent Marcoux, Director General, Research Branch, Communication Canada. The mandate of this committee is to improve the public opinion research process and to facilitate sharing of research results among departments and agencies.

Public Opinion Research Working Group

The Public Opinion Research Working Group is comprised mainly of departmental public opinion research coordinators. This working group provides an opportunity to discuss a wide range of issues and share strategies for overcoming common problems that occur in the research process. Topics from this past year included discussions surrounding the new Communications Policy from the Treasury Board Secretariat and the Service Improvement Initiative. Practical issues, such as the availability of new standing offers and other public opinion research tools, are also discussed regularly. Meetings for the working group occur every two to three months.

Public Opinion Research in the Government of Canada

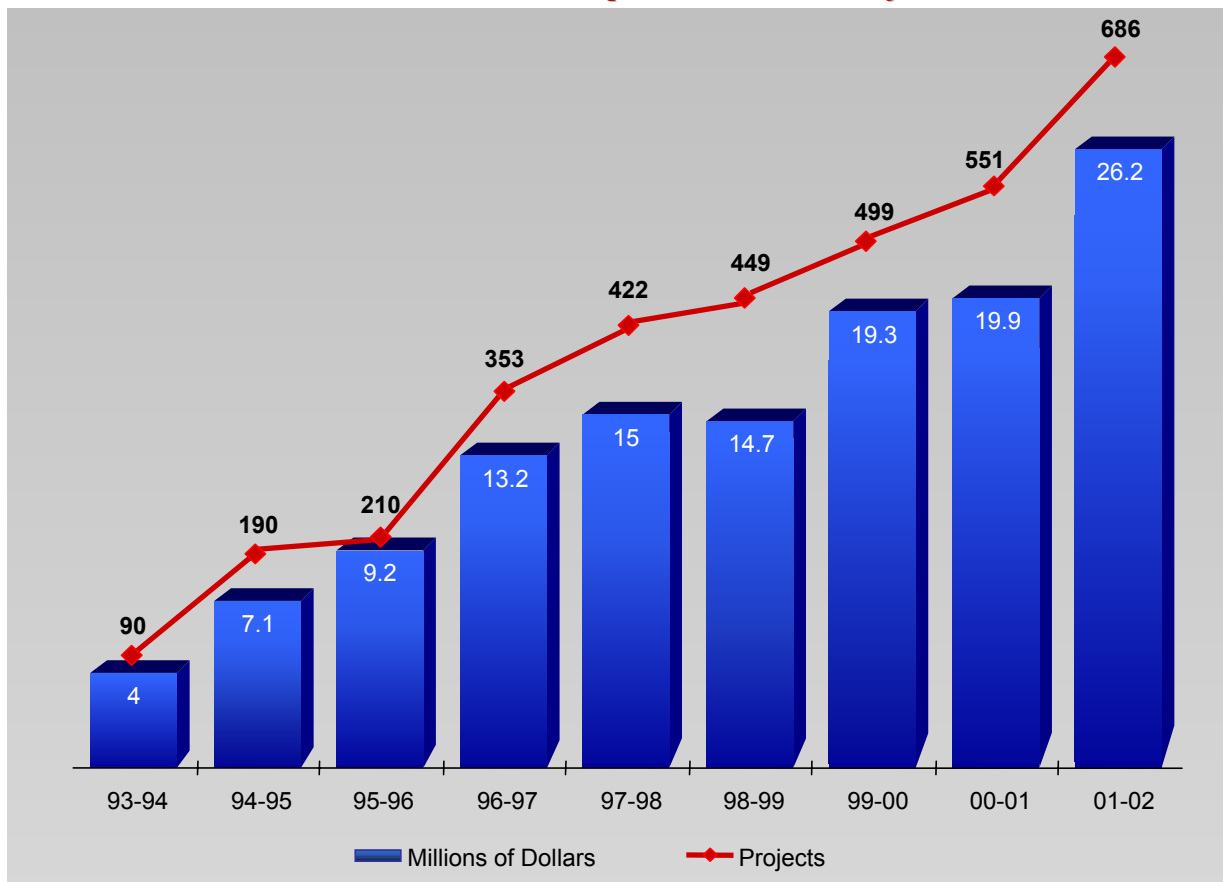
2001-2002

Overview

This section of the report details the volume, value and types of public opinion research done by departments and agencies of the Government of Canada and coordinated by Communication Canada from April 1, 2001 to March 31, 2002. It summarizes the research by department and agency and lists the firms they are using. This report also previews some of the key issues that will be facing the government research community in the coming months and years.

General Aspects of Public Opinion Research

Annual Total Cost and Number of Public Opinion Research Projects



The Government of Canada systematically gathers information on a wide range of topics in order to facilitate decision making. Public opinion research is one of the methods used to understand the points of view and expectations of citizens and various other populations. The use of public opinion research allows the Government of Canada to consult with and engage Canadians and other audiences in the fields of communications, government policy and program development, as well as in the evaluation of services.

The importance the Government of Canada places on listening to Canadians is clearly reflected in the consistent growth of public opinion research over the past decade. For the fiscal year 2001-2002, the total project dollar volume of public opinion research projects coordinated by Communication Canada was \$26.2 million. This represents an increase of 31% in dollars invested in public opinion research and an increase of more than \$6 million compared with the dollar volume of fiscal year 2000-2001.

This increase in expenditures in public opinion research may be attributed to several factors including the current Government of Canada emphasis on citizen-focused service delivery, the new Communications Policy’s emphasis on consulting with the public, meeting the needs of Canadians through government-on-line initiatives, and measuring client satisfaction levels for government services.

Departmental Rankings

Departmental Rankings for all Public Opinion Research		
Department	Thousands of Dollars	Number of Projects
Health Canada	\$4,036	88
Human Resources Development Canada	\$2,614	62
Communication Canada	\$2,117	70
Industry Canada	\$1,834	54
Environment Canada	\$1,343	36
Canadian Heritage	\$1,288	36
Treasury Board Secretariat	\$1,228	16
Foreign Affairs & International Trade	\$867	18
Natural Resources Canada	\$847	32
Justice	\$810	21

This fiscal year, seven departments each invested \$1 million or more on public opinion research. Health Canada invested the most in public opinion research. It was followed by Human Resources Development Canada, Communication Canada, Industry Canada, Environment Canada, Canadian Heritage and Treasury Board Secretariat. The three departments that rounded out the top ten, but which invested less than \$1 million each in public opinion research, include Foreign Affairs and International Trade, Natural Resources Canada, and Justice Canada.

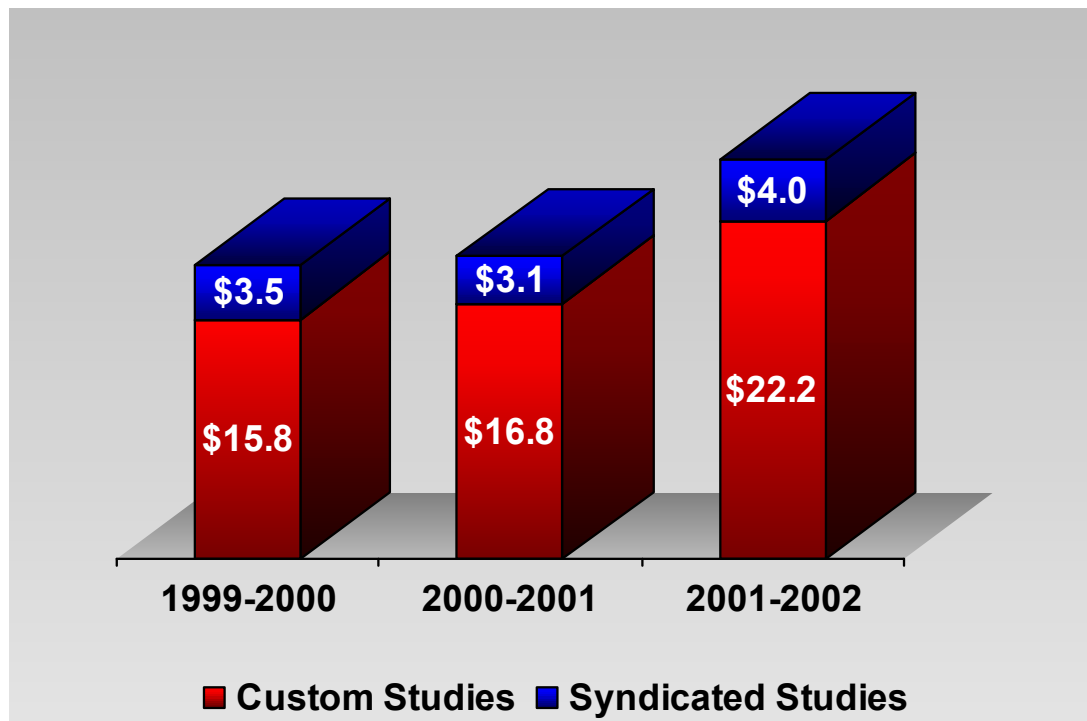
Public Opinion Research in Departments

Spending on Public Opinion Research 1999-2002 (thousands of dollars)						
Department	1999-2000		2000-2001		2001-2002	
	Value	Projects	Value	Projects	Value	Projects
Health Canada	\$2,419	45	\$2,300	62	\$4,036	88
Human Resources Development Canada	\$3,100	87	\$2,556	68	\$2,614	62
Communication Canada	\$1,128	18	\$2,105	60	\$2,117	70
Industry Canada	\$1,057	36	\$1,439	45	\$1,834	54
Environment Canada	\$375	16	\$810	24	\$1,343	36
Canadian Heritage	\$679	24	\$849	29	\$1,288	36
Treasury Board Secretariat	\$1,030	26	\$1,027	17	\$1,228	16
Foreign Affairs and International Trade	\$555	13	\$514	17	\$867	18
Natural Resources Canada	\$601	24	\$387	13	\$847	32
Justice Canada	\$1,102	21	\$626	19	\$810	21

Eight departments have increased their investment in public opinion research over the past two years: Health Canada, Communication Canada, Industry Canada, Environment Canada, Canadian Heritage, Treasury Board Secretariat, Foreign Affairs and International Trade, and Natural Resources Canada. Both Justice Canada and Human Resources and Development Canada now invest less in public opinion research than was the case two years ago.

Custom vs. Syndicated Studies

Comparison of Custom and Syndicated Studies (millions of dollars)

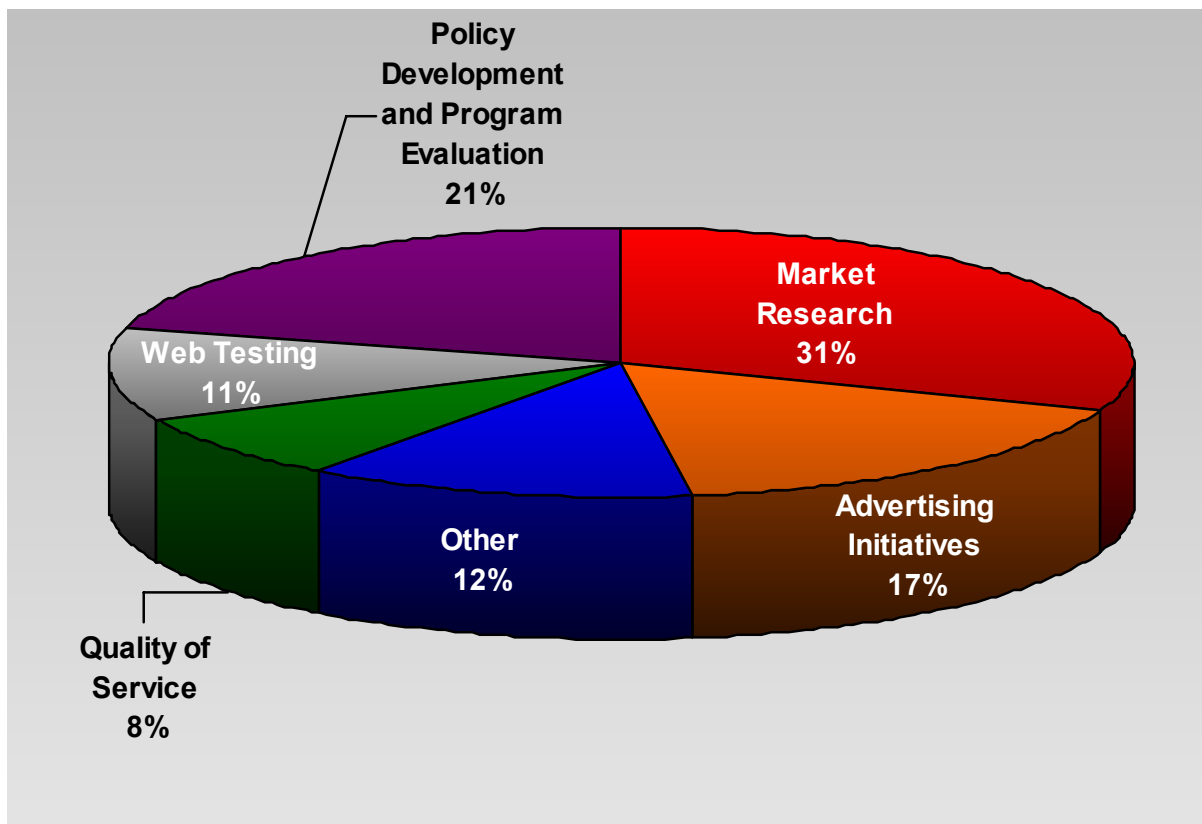


Custom public opinion research is research that an organization commissions from a private firm. The product is “customized” to fit the specific research needs of the department or agency. Once the report is rendered, the department owns the copyright of the report and all materials generated from the project may be shared with anyone the department wishes. In contrast, research firms own the copyright for syndicated studies. Departments purchase subscriptions to these studies and may not share the results with other departments.

Custom research continues to account for the vast majority of government public opinion research. The cost of syndicated studies increased from \$3.1 million in 2000-2001 to just over \$4 million this fiscal year. Further information on syndicated studies is found on page 25 of this report. The cost of custom research increased by \$6.3 million from what it was two years ago.

Type of Research

Type of Research as a Percentage of Total Cost of Public Opinion Research

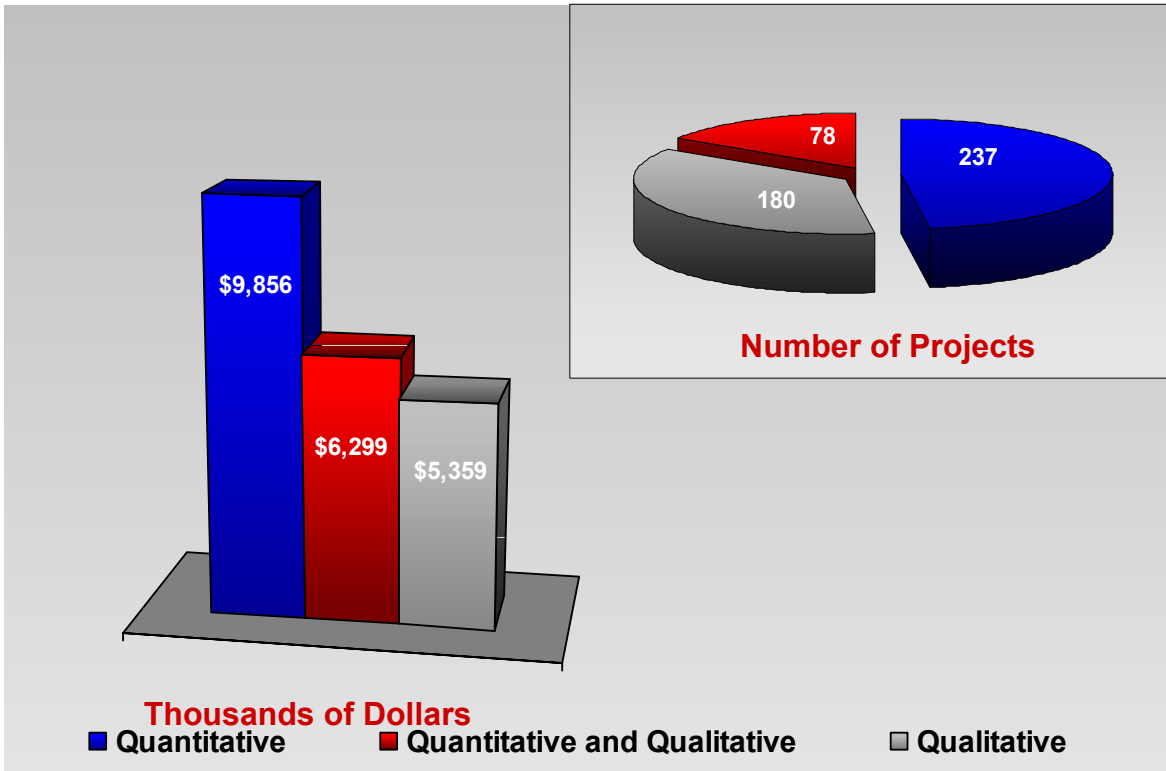


Public opinion research completed for the Government of Canada was quite varied in terms of the nature of the research. Market research, which includes projects such as the field work for Communication Canada's communication survey, was easily the most common type of research project. Research that was classified as policy development and program evaluation, such as Human Resource Development Canada's (HRDC) *Labour Force Tracking Survey*, was also used and amounted to \$4.6 million. It should be noted that the program evaluation portion of this type of research is only comprised of the public opinion research component of program evaluation. Other types of research that were popular this fiscal year included advertising initiatives (\$3.7 million), quality of service (\$1.8 million), and Web site testing (\$2.4 million).

Details of Public Opinion Research

Research Methodology

Research Methodologies Utilized for Public Opinion Research



Public opinion research projects utilized a variety of research methods. Quantitative research methods (telephone surveys in the vast majority of cases) accounted for nearly \$10 million and represented 46% of the total number of custom research projects. Projects that utilized qualitative research methods, such as focus groups and in-depth interviews, represented 35% of all research projects but only 25% of total costs. It is worth noting that, for the most part, qualitative research techniques tend to be less costly compared to quantitative research methods, although the results of the former cannot be extrapolated to the general population. Another 15% of all custom research projects, in terms of the number of projects, utilized both quantitative and qualitative research methods.

Target Populations

Target Populations for Public Opinion Research		
Target Population	Total Cost of Projects (thousands of dollars)	Number of Projects
General Population	\$13,154	335
Industry Sector, Business or Professionals	\$1,222	39
Public Servants	\$1,081	22
Engaged Canadians	\$971	23
Aboriginal Persons	\$622	15
Partners/Stakeholders	\$526	18
Clients	\$484	13
Seniors	\$76	3
Immigrants	\$40	2
Other	\$7,171	197

Research conducted for the Government of Canada this fiscal year was based upon a wide variety of target populations (the actual people being interviewed or studied in a particular research project). The majority of projects dealt with Canada’s general population but other studies were based on a wide variety of sub-populations that ranged from seniors to immigrants. The category “other” expands this list even more and includes such diverse groups as rural dwellers and farmers, unemployed Canadians, parents with children living at home, veterans, debit card users, opinion leaders and physicians, to name but a few.

Highlights of Key Public Opinion Research Projects

Each year the Government of Canada conducts a wide range of public opinion research that touches on an almost infinite variety of topics. This section of the report illustrates the large spectrum of issues and themes.

Health Canada

While a significant proportion of this year's research was linked to the Federal Tobacco Control Strategy and its associated social marketing campaigns, a broad range of qualitative and quantitative studies were conducted in the areas of health promotion and health safety, on issues such as:

- diabetes
- hepatitis C
- nutrition labelling
- organ and tissue donation
- sudden infant death syndrome
- breast cancer
- assisted human reproduction
- family violence
- fetal alcohol syndrome
- air pollution

These studies were among many different target populations, and for many different purposes—from assessing the communications impact of potential new messages, products and advertising campaigns, to seeking to understand how potential policy changes might affect broad public attitudes, motivations and behaviour.

Human Resources Development Canada

HRDC had projects concentrated in the broad areas of skills and learning, income security, Employment Insurance and labour, as well as projects that advanced the Government On-Line agenda to make government programs, services and publications accessible on the Internet.

Projects included several related to assessing the impact of elements of Canada's Youth Employment Strategy; others assessing policy and communications in the areas of labour market information, the Canada Child Tax Benefit, and skills and learning; and many Web sites and Web site-cluster concepts and usability tests. Target populations under study covered the broad spectrum of Canadian society, from youth-at-risk to pensioners, from parents to university students.

Communication Canada

The greatest number of projects this fiscal year involved collecting data for the Research Branch's communications survey *Listening To Canadians*. In addition, the department conducted research that dealt with a variety of Government of Canada advertisements, including the *We All Belong* campaign. Communication Canada also initiated five projects that focussed on quality of service in relation to the Canada Pavilion.

Industry Canada

Industry Canada conducted projects concentrated in several broad areas: developing policy and communications for the Government of Canada's innovation agenda; advancing Government On-Line; assessing the needs of small and medium-sized businesses; and protecting consumers.

Some specific projects included assessing public attitudes toward the changing electricity marketplace, toward biotechnology and toward consumer debit card services; doing research that ensured that elements of the Business Gateway and Canadian Consumer Information Gateway achieve maximum communications effectiveness; and testing usability for many Web sites. Target populations ranged from the general population to small business and industry leaders.

Environment Canada

Environment Canada's research dealt with a variety of issues. Tracking research was conducted to continue monitoring the public's attitudes toward Climate Change. A major survey of Canadians was undertaken to measure usage of and satisfaction with meteorological products and services. In addition, several surveys were conducted with residents living in specific locations where weather warnings had been issued just days prior to the surveys. In these cases, the surveys were intended to assess the level of recall of weather warnings and to gather information about actual behaviour following the issuance of a weather warning.

Research Highlights

This fiscal year there were several public opinion research studies conducted by the Government of Canada. Below is a brief description of some of the more notable of these studies, ranging from on-line studies to studies dealing with social cohesion following the events of September 11, 2001.

On-Line Studies

Two of the projects conducted on-line this fiscal year involved the Government of Canada's presence on the Internet. In January 2001, the Canada Site (<http://canada.gc.ca>), the primary Internet portal for information on the Government of Canada's programs and services, was revised. The research utilized both qualitative and quantitative methods to determine the best design for the welcome and home pages for the Canada Gateway.

A second Internet-related study was conducted by the four natural resource departments (Environment Canada, Natural Resources Canada, Fisheries and Oceans Canada, and Agriculture and Agri-Food Canada) and Health Canada that are partners in the development of the Environment, Natural Resources, Fisheries and Agriculture (ENRFA) Cluster on the Canada site. The purpose of the cluster is to create a Web portal where Canadians can go to find information related to sustainable development. The research project was conducted to determine public reaction to this proposed cluster.

Rural Youth Migration Study

Agriculture and Agri-food Canada conducted a study entitled the "Rural Youth Migration Study" on behalf of the Canadian Rural Partnership, which is composed of federal departments and other rural stakeholders. The goal of the Canadian Rural Partnership is to ensure that federal programs, policies and activities provide support to rural communities. The study surveyed rural youth about their aspirations and perceived opportunities regarding education, employment and preferred location to live. Community leaders were also asked for their views on the need for post-secondary schooling, the opportunities to create jobs for young people, support for entrepreneurial self-employment opportunities for youth and the availability of other community resources for rural youth.

Statistics Canada Town Hall Meetings

A number of town hall meetings and focus groups were held to help give Statistics Canada guidance with respect to the possibility of amending the *Statistics Act* to allow historical census records to be made available to the public. The research was intended to ensure, if access to historical census records is provided, that it be done in a manner that respects the concerns of Canadians for privacy and for the integrity of government.

Official Languages

The Treasury Board Secretariat—in collaboration with the Office of the Commissioner of Official Languages, Communication Canada and Canadian Heritage—undertook a research project into the current attitudes towards the use of both official languages within the public service of Canada. The purpose of the research was to identify the barriers and opportunities to increasing the active use of both official languages in the Government of Canada workplace and to increasing the capacity of employees to use both official languages in the service of Canadians.

Social Cohesion

Canadian Heritage (which served as the lead department), Citizenship and Immigration Canada and Communication Canada commissioned a research project that was designed to determine attitudes towards racial and religious minorities and immigrants in the wake of the September 11, 2001 attacks. This study on social cohesion utilized both quantitative and qualitative research methods.

Syndicated Studies

Rankings of Syndicated Studies	
Syndicated Study	Departmental Subscriptions
Rethinking Government (Ekos Research Associates)	14
The Ipsos Trend Report (formerly the Angus Reid Report) (Ipsos-Reid)	12
Rethinking the Information Highway (Ekos Research Associates)	11
Focus Canada (EnviroNics Research)	10
Rethinking North American Integration (Ekos Research Associates)	9
Perspectives Canada (Pollara)	7
Compas Business Agenda (Compas Research)	7
Emerging Perspectives on Innovation (Ekos Research Associates)	6
Public Safety in the New Millennium (Ipsos-Reid)	6
Reconnecting Government with Youth V (Ipsos-Reid)	6
3SC (CROP)	5
Rethinking Citizen Engagement (Ekos Research Associates)	5
National Pulse on Health (EnviroNics Research)	2
Perceptions Regarding Family Violence (Ekos Research Associates)	2

Syndicated studies continued to be utilized this fiscal year by the Government of Canada. A number of departments used the “Rethinking” series, with *Rethinking Government* having the greatest number of subscriptions. A number of departments also subscribed to other studies that provided a broad-based overview of public opinion research; these included *The Ipsos Trend Report*, *Focus Canada* and *Perspectives Canada*. A number of departments also chose to subscribe to Ekos’ *Rethinking the Information Highway* and *Rethinking North American Integration*.

Thematic Overview of Syndicated Studies

As a whole, the Government of Canada subscribed to a number of syndicated studies that deal with a wide variety of issues. Below is a thematic overview of these syndicated studies.

National Public Opinion Overviews:

CROP Express (CROP)

3SC (CROP)

Rethinking Government (Ekos Research Associates)

Rethinking Citizen Engagement (Ekos Research Associates)

Focus Canada (Environics Research Group)

Goldfarb Report (Goldfarb Consultants)

The Ipsos Trend Report Canada (formerly the *Angus-Reid Report*) (Ipsos-Reid)

Perspectives Canada (Pollara)

Environmental Monitor (Environics Research Group)

Regional Reports:

Atlantic Omnibus Report (Corporate Research Associates)

Québec 360 (Créatec +)

North of 60 (Environics Research Group)

Focus Ontario (Environics Research Group)

Options for Western Canada (Ipsos-Reid)

BC Reid Report (Ipsos-Reid)

Alberta Reid Report (Ipsos-Reid)

Ontario Reid Report (Ipsos-Reid)

High Technology and Innovation:

Rethinking the Information Highway (Ekos Research Associates)

Emerging Perspectives on Innovation (Ekos Research Associates)

Inter@ctive Reid Report (Ipsos-Reid)

International Issues:

Rethinking North American Integration (Ekos Research Associates)
International Environmental Monitor (Environics International)
Globe Scan Report on Sustainable Development Trends (Environics International)
World Monitor (Ipsos-Reid)

Security:

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

Youth Issues:

Reconnecting Government with Youth (Ipsos-Reid)
Campus Pulse: Understanding Young Adults (The Logit Group)
Trendscan: Report on Teen Lifestyles (Youth Culture)

Health Issues:

National Pulse on Health (Environics Research Group)
Health Insider Report (PriceWaterhouseCoopers)

Business/Economic Issues:

Compas Business Agenda (Compas)
Monthly Index of Consumer Attitudes (Conference Board of Canada)
Corporate Social Responsibility Monitor (Environics International)
2002 Canadians and the Economy (Ipsos-Reid)

Other Topics:

Sport Canada Research on the Canada Winter Games (Decima Research)
Perceptions Regarding Family Violence (Ekos Research Associates)
Citizens First 2002 (Institute of Public Administration of Canada)
Wheat Market Watch (Ipsos-Reid)
Farm Management Practices Benchmark (Ipsos-Reid)
Public Views Regarding Aboriginal Peoples (Ipsos-Reid)
New Thoughts for Food (Ipsos-Reid)
Nielsen Television Index (Nielsen Media Research)

Access to Expertise

Research Firm Rankings for Public Opinion Research		
Firm	Thousands of Dollars	Number of Projects
Ekos Research Associates	\$4,567	112
Environics Research Group	\$3,615	72
Ipsos-Reid	\$3,537	106
Compas	\$2,031	50
Créatec +	\$1,528	31
Pollara	\$1,446	23
Phase 5 Consulting Group	\$1,213	28
Decima Research	\$1,181	28
Goldfarb Consultants	\$862	19
GPC Factor Research Group	\$790	12

This fiscal year the Government of Canada used the services of 83 research firms to fulfil its public opinion research needs.

Access to Expertise – Custom Research

Research Firm Rankings for Custom Research		
Firm	Thousands of Dollars	Number of Projects
Environics Research Group	\$3,333	60
Ekos Research Associates	\$2,917	56
Ipsos-Reid	\$2,628	60
Compas Research	\$1,898	43
Pollara	\$1,346	23
Créatec +	\$1,378	30
Phase 5 Consulting Group	\$1,226	27
Decima Research	\$1,170	27
Goldfarb Consultants	\$792	16
GPC Factor Research Group	\$790	11

Overall, Environics Research Group received more revenue for custom research projects (all studies except syndicated reports) than any other private sector firm. Indeed, Environics Research Group earned 14% more than Ekos Research Associates, which ranked second. In total, eight firms each had revenues of at least \$1 million from custom research projects.

Access to Expertise – Syndicated Studies

Research Firm Rankings for Syndicated Studies	
Firm	Thousands of Dollars
Ekos Research Associates	\$1,639
Ipsos-Reid	\$909
Environics Research Group	\$400
CROP	\$228
Perspectives Canada Ltd	\$169
Créatec+	\$150
Compas Research	\$137
Environics International Ltd.	\$135
Goldfarb Consultants	\$70
Institute of Public Administration of Canada	\$54

Ekos Research Associates was the leading firm in terms of the revenue it received for departmental subscriptions to syndicated studies. It was followed by Ipsos-Reid and Environics Research Group. Government departments subscribed to a total of 44 different syndicated studies.

The Look Ahead: Public Opinion Research Issues for the Coming Year

In looking ahead at the fiscal year 2002-2003, there are several challenges that Communication Canada and its partners will be addressing in relation to public opinion research.

Advertising Campaign Evaluation Tool:

There is a growing desire within the Government to develop a common set of measurements to evaluate the effectiveness of advertisements. The Government of Canada has developed a standard set of questions for use in surveys that evaluate major advertising campaigns. Departments are encouraged to use these questions in smaller campaigns, as well. This common measurement tool determines the effectiveness of Government of Canada advertisements. This new tool will help departments save money in the design of questionnaires and improve the consistency of the research and the ability to measure the effectiveness of advertisements.

On-Line Research:

On-line research is becoming increasingly popular and there is now a proliferation of software packages that make it easy for organizations to conduct such research. The Government of Canada will need to develop standards to determine what research is appropriate, when outside consultants need to be hired and what privacy and accessibility issues need to be addressed. While this research promises great value, it comes with its own set of issues that must be addressed. One of the main concerns presented by on-line research is that it often lacks the rigour and quality of traditional public opinion research. For the research to be useful, it must adhere to correct methodologies and the data must be interpreted correctly. This coming year, Communication Canada will endeavour to help develop government-wide standards for on-line research.

Service Improvement Initiative:

The Service Improvement Initiative is one of the important initiatives the Government of Canada is currently undertaking. Under the Initiative, departments and agencies are required to establish documented baseline measures of client satisfaction for key services to the public using a Common Measurements Tool (CMT). The CMT consists of 10 core questions that must be included by all departments and agencies when assessing client satisfaction levels. This tool must also be used in developing their annual Service Improvement Plans and core service standards. Communication Canada has been working with the Treasury Board Secretariat to establish standing offers related to the Service Improvement Initiative. The major requirement under the resulting standing offers will be the design, implementation, and analysis of client satisfaction surveys that incorporate the CMT.

Coordination and Sharing:

In 2002-03, Communication Canada will continue to work toward the twin goals of inter-departmental coordination of public opinion research and the sharing of this research among departments. Already there are a number of resources that will help facilitate the sharing of public opinion research, including easier access to research results and greater sharing of research methodologies and best practices among the government research community. In addition, the public opinion research working group will continue to meet regularly, with membership expanding to include coordinators from more departments, as well as contracting advisors from Public Works and Government Services Canada. The Directors General Committee on public opinion research will meet to discuss such emerging issues as on-line research, advertising evaluation and syndicated studies. A number of tools and resources will be implemented for the research community, including a methodological guide and expanded on-line information on public opinion research studies.

Appendix Tables

Table One

Departmental Rankings for all Public Opinion Research		
Department	Thousands of Dollars	Number of Projects
Health Canada	\$4,036	88
Human Resources Development Canada	\$2,614	62
Communication Canada	\$2,117	70
Industry Canada	\$1,834	54
Environment Canada	\$1,343	36
Canadian Heritage	\$1,288	36
Treasury Board Secretariat	\$1,228	16
Foreign Affairs & International Trade	\$867	18
Natural Resources Canada	\$847	32
Justice Canada	\$810	21
National Defence	\$707	15
Canada Customs and Revenue Agency	\$687	23
Privy Council Office	\$678	15
Transport Canada	\$666	16
Finance Canada	\$637	19
Public Works & Government Services Canada	\$634	23
Fisheries & Oceans Canada	\$616	12
Canada Investment & Savings	\$526	8
Parks Canada	\$467	6
Indian & Northern Affairs Canada	\$458	13
Agriculture & Agri-Food Canada	\$430	9
Citizenship & Immigration Canada	\$404	11
Statistics Canada	\$375	7
Western Economic Diversification Canada	\$234	17
Emergency Preparedness Canada	\$222	6

Table One (Continued)

Department	Thousands of Dollars	Number of Projects
Veterans Affairs Canada	\$146	6
Canadian International Development Agency	\$107	6
National Energy Board	\$99	2
Correctional Service of Canada	\$83	4
Canadian Institutes of Health Research	\$83	1
Office of the Privacy Commissioner of Canada	\$69	2
Canadian Food Inspection Agency	\$60	2
Royal Canadian Mounted Police	\$54	1
Solicitor General Canada	\$52	1
National Library of Canada	\$40	2
National Film Board	\$39	2
Canada Research Chairs	\$27	2
National Research Council Canada	\$25	1
National Archives of Canada	\$22	1
Transportation Safety Board	\$21	1
Economic Development Canada	\$20	3
Consulting and Audit Canada	\$20	1
Federal Court of Canada	\$11	1

Table Two

Research Firm Rankings in Dollar Values for all Public Opinion Research	
Firm	Thousands of Dollars
Ekos Research Associates	\$4,567
Environics Research Group	\$3,615
Ipsos-Reid	\$3,537
Compas Research	\$2,031
Créatec +	\$1,528
Pollara	\$1,446
Phase 5 Consulting Group	\$1,213
Decima Research	\$1,181
Goldfarb Consultants	\$862
GPC Factor Research Group	\$790
Sage Research	\$631
Patterson, Langlois Consultants	\$488
CF Group Inc.	\$405
Viewpoint Learning Inc.	\$324
R.A. Malatest & Associates	\$297
Binarius Research Group	\$253
CROP	\$248
Corporate Research Associates	\$195
Léger Marketing	\$189
Vision Research	\$181
Environics International Ltd.	\$164
Perspectives Canada Ltd.	\$169
Earncliffe Research	\$155
Circum Network Inc.	\$143
Cogem	\$121

Table Two (Continued)

Firm	Thousands of Dollars
Delta Media	\$95
Conference Board of Canada	\$80
PriceWaterhouseCoopers	\$78
Strathmere Associates International Ltd.	\$74
Fast Consulting	\$63
ViewStats Research	\$54
Institute of Public Administration of Canada	\$54
Berger, Earl	\$38
Youth Culture	\$37
Bélisle Marketing Ltée	\$26
Infocus	\$25
Brenda Buchanan	\$25
Venture Communications	\$25
Plan-it safe (CHEO)	\$25
Akwatu Khenti	\$25
SQM Group	\$25
Hall & Hall Associates Limited	\$25
D-Code	\$25
Corum Research	\$25
Istudio Canada Inc.	\$25
Prairie Research Associates Inc.	\$25
Ad Hoc Marketing	\$25
Service-Growth Consultants Inc.	\$25
Echo Sondage	\$24
Canadian Energy Research Institute	\$24

Table Two (Continued)

Firm	Thousands of Dollars
Landal Inc.	\$23
Bristol Group	\$22
In-Touch Survey Systems	\$22
The Logit Group	\$22
Thinklounge	\$21
York University's Institute for Social Research	\$21
Totum Research	\$21
Harley House Consultants Inc.	\$21
HRSG Worscan	\$20
Jacques Belzile	\$20
Learneze.com	\$19
Northstar Research Partners	\$19
Innovative Management Solutions	\$16
Queen's University	\$15
Canadian Labour and Business Centre	\$15
Catherine MacFarlane Evaluation Consultant	\$15
Opinion Search Inc.	\$13
Goss, Gilroy & Associates	\$12
Rencontres Int. du doc. de Montréal	\$11
Seer Research & Marketing	\$10
Nielsen Media Research	\$9
Omnifacts Research	\$8
Market Explorers	\$8
IBR Consulting Services Ltd.	\$8
Réseau des SADC du Québec	\$6

Table Two (Continued)

Firm	Thousands of Dollars
Criterion Research Corp	\$6
HLB Decision Economics Inc.	\$5
Sondages Ad Valorem (SAV) inc.	\$5
Viewpoints Research	\$5
Oraclepoll	\$5
Performance Management Network	\$5
Vision Research - Darmonkow Communication	\$3
The RDI Group	\$3

Table Three

Syndicated Studies by Firm	
Firm and Study Title	Total Dollars for All Departmental Subscriptions (thousands of dollars)
Ekos Research Associates	\$1,639
Rethinking the Information Highway	\$471
Rethinking Government	\$423
Rethinking North American Integration	\$254
Rethinking Citizen Engagement	\$170
Emerging Canadian Perspectives on Innovation	\$150
Perceptions Regarding Family Violence	\$107
Public Security Monitor	\$64
Ipsos-Reid	\$909
Reconnecting Government with Youth	\$246
Public Safety in the New Millennium	\$150
Ipsos-Reid Trend Report	\$124
New Thoughts for Food	\$72
Public Views Regarding Aboriginal Peoples	\$65
Options for Western Canada	\$50
Alberta Reid Report	\$44
BC Reid Report	\$42
Ipsos-Reid Farm Management Practices Benchmark	\$27
World Monitor	\$21
Ontario Reid Report	\$21
2002 Canadians and the Economy	\$16
Wheat Market Watch	\$14
2002 Small Scale Operator Study	\$11
The Canadian Inter@ctive Reid Report	\$5

Table Three (Continued)

Firm and Study Title	Total Dollars for All Departmental Subscriptions (thousands of dollars)
Environics Research Group	\$400
Focus Canada	\$226
National Pulse on Health Strategy	\$139
North of 60 Syndicated Study	\$24
Focus Ontario	\$11
CROP	\$228
3SC	\$222
CROP-Express	\$6
Perspectives Canada Ltd.	\$169
Perspectives Canada	\$169
Créatec +	\$150
Québec 360	\$150
Compas Research	\$137
Compas Business Agenda	\$137
Environics International Ltd.	\$135
Environmental Monitor	\$92
Corporate Social Responsibility Monitor	\$23
Globe Scan Report	\$19
Goldfarb Consultants	\$70
Goldfarb Report	\$70
Institute of Public Administration of Canada	\$54
Citizens First 2002: Advancing Citizen-Centred Service in the Public Sector	\$54
Conference Board of Canada	\$30
Monthly Index of Consumer Attitudes	\$30
The Logit Group	\$22
Campus Pulse: Understanding Young Adults	\$22

Table Three (Continued)

Firm and Study Title	Total Dollars for All Departmental Subscriptions (thousands of dollars)
Youth Culture	\$21
Trendscan: Report on Teen Lifestyles Wave 2	\$21
Corporate Research Associates	\$14
Atlantic Omnibus Report	\$14
PriceWaterhouseCoopers	\$13
Health Insider Report	\$13
Decima Research	\$11
Sport Canada Research on the Canada Winter Games	\$11
Nielsen Media Research	\$9
Nielsen Television Index	\$9
IBR Consulting Services	\$9
IBR Consulting Syndicated Studies	\$9