



Public Opinion Research
in the Government of Canada

ANNUAL REPORT

2009–2010



Public Works and
Government Services
Canada

Travaux publics et
Services gouvernementaux
Canada

Canada 

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Prepared by Public Works and Government Services Canada

MINISTER'S MESSAGE



I am pleased to present the Government of Canada's 2009–2010 Annual Report on Public Opinion Research.

Public Works and Government Services Canada (PWGSC) is a common service provider for Government of Canada departments. We focus on quality services and sound financial stewardship, and help departments to deliver programs and services of optimal value to Canadians. One way PWGSC does this is through the coordination of public opinion research activities for the Government of Canada.

Public opinion research is an important tool for government departments. It reaches a wide range of Canadians including the general public, users of government services, and those in particular segments of the population such as parents, victims of crime, business people, seniors, youth, Aboriginal peoples and persons with disabilities. This type of research plays an important role in assessing the effectiveness of government policies, programs and services to ensure that they reflect the priorities of the citizens of this country. Information gathered is used to better understand the needs and expectations of Canadians, and gives them a way to contribute to the discussion.

The government continues to seek ways to ensure greater consistency in the quality of public opinion research studies. New standards for telephone and online survey research were developed based on extensive consultations with stakeholders within and outside of government. In some cases, these standards exceed those of the marketing research industry. They will help provide the government with a harmonized approach to survey quality and ensure transparency and value for money.

This year's report provides information on the contracted public opinion research activities carried out in the 2009–2010 fiscal year. The report reflects the findings of 148 research studies undertaken for government departments and agencies. It also includes a chapter on how we share the knowledge gained from these studies. You will also find some interesting examples of research related to the 2010 Olympic and Paralympic Winter Games, the H1N1 vaccine, and Emergency Preparedness Week 2009.

This report presents an overview of how public opinion research is being managed and how it is helping to shape the long-term priorities of the Government of Canada. It is my hope that you will find this information useful.

A handwritten signature in black ink that reads "Rona Ambrose". The signature is fluid and cursive.

THE HONOURABLE RONA AMBROSE, P.C., M.P.

Minister of Public Works and Government Services and Minister for Status of Women

TABLE *of* CONTENTS

MINISTER'S MESSAGE	i
INTRODUCTION	1
Definition of Public Opinion Research	1
Role of Public Opinion Research	1
Benefits to Canadians	2
HOW PUBLIC OPINION RESEARCH <i>is</i> MANAGED <i>in the</i> GOVERNMENT <i>of</i> CANADA	5
Organizations with a Responsibility for Public Opinion Research	5
STRENGTHENING PUBLIC OPINION RESEARCH MANAGEMENT <i>in the</i> GOVERNMENT <i>of</i> CANADA	9
Planning and Contracting Public Opinion Research	9
Standing Offers for Public Opinion Research	10
Government of Canada Standards for Telephone and Online Survey Research	11
PUBLIC OPINION RESEARCH ACTIVITIES <i>in the</i> GOVERNMENT <i>of</i> CANADA	13
Business Volume in Public Opinion Research	13
Application of Public Opinion Research by the Government of Canada	13
Informing Canadians	15
Taking Into Account Canadians' Needs	15
Research Supporting Other Government Activities	16
Approaches to Custom Research	16
Quantitative research	17
Qualitative research	17
Procurement Methods in Public Opinion Research	19
Geographic Reach of Surveys and Locations of Focus Group Studies Conducted for the Government of Canada in 2009–2010	19
Target Groups Reached	22
SHARING KNOWLEDGE	23
Knowledge within Government: The Community of Practice	23
Knowledge Sharing with the Marketing Research Profession	24
Results for Canadians	25
Continuing Education	26

HIGHLIGHTS of PUBLIC OPINION RESEARCH PROJECTS	27
Agriculture and Agri-Food Canada	27
<i>Consumer Selection of Labelled Products in a Simulated</i>	
<i>Grocery Retail Setting</i>	27
Canada Revenue Agency	29
<i>CRA Concept and Message Testing 2009</i>	29
Canadian Food Inspection Agency	30
<i>Usability Testing of the Consumer Centre Web Site</i>	30
Canadian Heritage	31
<i>Canadians' Awareness of the 2010 Olympic and Paralympic</i>	
<i>Winter Games</i>	31
Foreign Affairs and International Trade Canada	32
<i>Tracking Survey of US Importers and Exporters' Perceptions of</i>	
<i>Canada's Asia Pacific Gateway</i>	32
Health Canada	33
<i>Survey of Canadians' Knowledge and Behaviour Related to</i>	
<i>Food Safety</i>	33
<i>Perceptions and Intentions of Canadians on Seasonal and</i>	
<i>H1N1 Vaccines</i>	34
<i>2009 Baseline Survey about Pandemic Influenza among</i>	
<i>First Nations On-Reserve and Northern Inuit</i>	35
National Defence	37
<i>Canada First Defence Strategy and Military Procurement</i>	37
<i>Views of the Canadian Forces</i>	37
Natural Resources Canada	38
<i>2009 Alternative and Renewable Fuels Research Study</i>	38
Parks Canada	40
<i>2009 National Survey of Canadians</i>	40
Public Safety Canada	41
<i>Emergency Preparedness Week 2009 Evaluation</i>	41
FOR MORE INFORMATION	43
APPENDICES	45
Appendix I: Listing of Departments Engaged in	
Public Opinion Research in 2009–2010	46
Appendix II: Listing of Contractors Engaged in	
Public Opinion Research in 2009–2010	48
Appendix III: Locations and Total Numbers of Focus Groups	
Studies Conducted for the Government of Canada in 2009–2010	49
Appendix IV: Standing Offers for Public Opinion Research	
in 2009–2010	50
Appendix V: New Standing Offers for Public Opinion Research,	
Effective April 1, 2010	51

INTRODUCTION

DEFINITION *of* PUBLIC OPINION RESEARCH

Public opinion research (POR) in the Government of Canada is the planned gathering, by or for a government institution, of opinions, attitudes, perceptions, judgments, feelings, ideas, reactions and views that are intended to be used for any government purpose, whether that information is collected from persons (including employees of government institutions), representatives of businesses, institutions or other entities, through quantitative or qualitative methods.

Research and methods for obtaining opinions that are not considered to be opinion research include: literature reviews or reviews of secondary sources, including reviews of already conducted public opinion research; secondary analysis of previously collected public opinion research data; and verification of performance of services or delivery of goods in contract situations.



ROLE OF PUBLIC OPINION RESEARCH

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

COMMUNICATIONS POLICY OF THE GOVERNMENT OF CANADA

BENEFITS to CANADIANS

The *Communications Policy of the Government of Canada* acknowledges the importance of consulting the public to take account of people's interest and concerns when establishing priorities, developing policies and planning programs and services. POR is one of the methods used by the government to listen to the public's needs and expectations. It uses reliable, impartial and systematic methods to collect opinions of Canadians as a whole or those that could be most affected by particular Government of Canada programs, policies and activities. Real-time feedback can also be obtained with POR, which can be of great benefit to Canadians in times of emergency or rapidly evolving crises.

POR undertaken by the Government of Canada reaches a wide range of Canadians, including the general public, users of government services, and those in particular segments of the population, such as parents, victims of crime, business people, seniors, potential military and public service recruits, youth, Aboriginal peoples and persons with disabilities. When their opinions are expressed through research studies, Canadians are providing important information that contributes to the government decision-making process.

Results collected through POR are used to develop policies, programs, services and initiatives. With them, the government can measure its progress in improving service quality, plan and evaluate communication, marketing, advertising and other activities. This helps ensure government activities are achieving their intended results, are well managed and responsive to the needs of Canadians.

EMERGENCY PREPAREDNESS

Every year Canadians face a variety of emergency situations. Disasters can confine families at home and force evacuations. Floods, hurricanes, ice storms, hazardous-material leaks and other disasters could affect water supplies, cut electricity and telephone services for days or weeks.

To help counteract the negative effects of such disasters, Public Safety Canada coordinates an annual Emergency Preparedness Week (EP Week) in collaboration with provinces and territories and partners. The event's primary goal is to raise awareness of the importance of having an emergency kit, making an emergency plan and identifying risks. These three simple steps can help Canadians prepare for many types of emergencies.

*In 2009, Public Safety Canada conducted the **Emergency Preparedness Week 2009 Evaluation** to review Canadians' awareness about personal emergency preparedness. The evaluation helped the department to assess the overall effectiveness and efficiency of the EP Week public awareness campaign. This allows Public Safety Canada to make appropriate adjustments to future emergency preparedness campaign messaging and tactics to encourage Canadians to take action in preparing for an emergency. By being better prepared, Canadians can reduce the risks and lessen the consequences of an emergency.*

*Additional information regarding the **Emergency Preparedness Week 2009 Evaluation** study is available in the Highlights of Public Opinion Research Projects section of the report.*

FOOD SAFETY

Health Canada and the Public Health Agency of Canada estimate that, every year, as many as 11 million Canadians suffer from illnesses caused by food-borne bacteria. Although most individuals fully recover from what is commonly called food poisoning, these illnesses can cause chronic health problems, and sometimes death. Food-borne illnesses also have long-term consequences for the economy and society as a whole, with an annual monetary cost estimated as high as \$14 billion.

*In the winter of 2010, Health Canada conducted the study **Survey of Canadians' Knowledge and Behaviour Related to Food Safety** to identify the extent to which at-risk Canadians are aware of food safety practices. The survey aimed to pinpoint knowledge gaps related to proper food handling and storage practices, clarify people's ability to self-identify as being at greater risk, and determine how at-risk groups prefer to receive information on proper food handling and storage practices.*

By examining current food safety behaviours of "at-risk" individuals, the Government can better identify information gaps across the population, measure individual's awareness of their status as "at-risk" for complications from food-borne illness and assess the knowledge of methods one can employ to improve food safety. The results from the study informed Health Canada's development of consumer outreach initiatives. The results will also support the Public Health Agency of Canada in preparing effective communications strategies and tactics to be used in case of future outbreaks of food-borne illness. Targeted communications products will help improve Canadians' knowledge of safe food-handling practices and encourage people to maintain and improve their health.

*Additional information regarding the **Survey of Canadians' Knowledge and Behaviour Related to Food Safety** study is available in the Highlights of Public Opinion Research Projects section of the report.*

H1N1

In June 2009, the World Health Organization (WHO) raised a pandemic alert for the H1N1 virus. Consequently, Health Canada and the Public Health Agency of Canada put plans in action for a large-scale and widespread health emergency. At that time, little information was available regarding Canadians' knowledge, perceptions and behavioural intentions regarding the new H1N1 virus. Further information was required to refine communication products and other policy needs specifically associated with this outbreak.

The Government of Canada undertook proactive work to understand Canadians' views about the H1N1 pandemic. The results of the study enabled the government to develop key communications messages, products and dissemination tactics for immediate response to the H1N1 outbreak. In turn, Canadians received relevant and up-to-date communications to help them in times of need and to inform their decision-making.

*As an example of the research that was completed on H1N1, see the study **Perceptions and Intentions of Canadians on Seasonal and H1N1 Vaccines**, which is available in the Highlights of Public Opinion Research Projects section of this report.*



HOW PUBLIC OPINION RESEARCH *is* MANAGED *in the Government of Canada*



ORGANIZATIONS *with a* RESPONSIBILITY *for* PUBLIC OPINION RESEARCH

The Treasury Board *Communications Policy of the Government of Canada* sets out a framework for conducting POR. The policy is mandatory for departments identified in Schedules I, I.1 and II of the *Financial Administration Act*, unless excluded by specific acts, regulations, or Orders of Council. As of June 9, 2009, the following agents of Parliament are exempt under the provisions covering POR in the *Communications Policy of the Government of Canada*:

- Office of the Auditor General of Canada;
- Office of the Chief Electoral Officer;

- Office of the Commissioner of Lobbying of Canada;
- Office of the Commissioner of Official Languages;
- Offices of the Information and Privacy Commissioners of Canada; and
- Public Sector Integrity Canada.

The *Procedures for Planning and Contracting Public Opinion Research* describe key requirements for heads of communications and the roles of the Communications and Consultations Secretariat at the Privy Council Office (PCO). The procedures also describe the roles of the Public Opinion Research Directorate (PORD) and the Communications Procurement Directorate (CPD) at Public Works and Government Services Canada (PWGSC), and the Documentary Heritage Collection Sector at Library and Archives Canada (LAC). This report outlines only POR activities coordinated through PWGSC.

DEPARTMENTS are at the centre of the overall process. They are responsible for the management of their POR activities as well as the research content and the overall quality of the research. Departments are also responsible for accepting all deliverables and for the payment of suppliers.

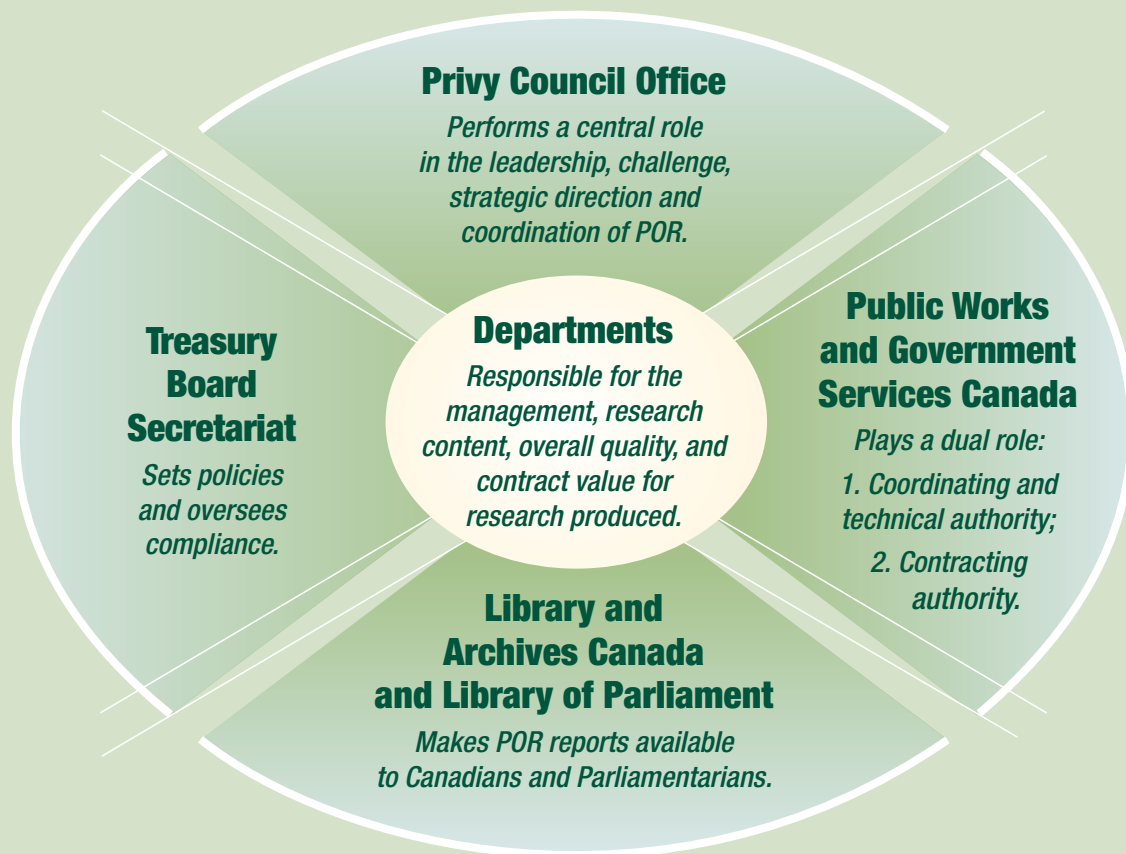
The **PRIVY COUNCIL OFFICE** plays a central role in the leadership, challenge, strategic direction and coordination of departmental and horizontal POR activities.

The **TREASURY BOARD SECRETARIAT** (TBS) advises and supports the Treasury Board and its president in the development, management and evaluation of administrative policy. Under the *Communications Policy of*

the Government of Canada, TBS is responsible for developing, evaluating and reviewing government-wide communications policy, which includes POR. TBS is also responsible for advising institutions on policy interpretation.

LIBRARY AND ARCHIVES CANADA ensures increased transparency by facilitating access to POR reports. LAC receives copies of final reports from departments within six months of the completion of POR fieldwork. The **LAC Web site** (www.porr-rrop.gc.ca) provides access to bilingual executive summaries and final reports from research contracted after August 1, 2006. The **LIBRARY OF PARLIAMENT** makes the reports available to members of Parliament and the media.

FIGURE 1 ORGANIZATIONS *with a* RESPONSIBILITY *for* PUBLIC OPINION RESEARCH



PUBLIC WORKS AND GOVERNMENT

SERVICES CANADA works with other federal organizations to serve Canadians efficiently and cost-effectively. The department is the coordinating, technical and contracting authority for POR within the government. PWGSC exercises this authority through two of its directorates, the Public Opinion Research Directorate and the Communication Procurement Directorate, which collaborate to provide seamless services to federal organizations.

- The **Communication Procurement Directorate** provides a mandatory common service as the government's contracting authority for public opinion research. The directorate manages the procurement process for all departmental public opinion research requirements in accordance with Government of Canada policies; awards and manages contracts; and, where applicable, chairs and conducts open, fair and transparent bid evaluation processes.

- The **Public Opinion Research Directorate** provides a mandatory common service as the technical and coordinating authority of POR activities. Federal organizations must consult the directorate from the initial stages of planning POR projects. PORD is also responsible for initiating the contracting process through the assignment of a registration number for each project.

PORD helps departments with their research needs, facilitates the procurement of services, shares best practices and research results, and coordinates work across federal organizations. More specifically, PORD is tasked with activities such as:

- confirming whether projects fall within the definition of POR;
- providing advice on legislative, regulatory and policy requirements, as well as generally accepted methodologies, research standards and benchmarks; and
- contributing to government-wide capacity building in the discipline of POR.

STRENGTHENING PUBLIC OPINION RESEARCH MANAGEMENT *in the Government of Canada*



PLANNING *and* CONTRACTING PUBLIC OPINION RESEARCH

To ensure coherent, cost-effective management of public opinion research throughout the government, institutions are required to follow a number of legislative, regulatory and policy requirements. These include:

- *Financial Administration Act*, which prohibits POR reports that are verbal only;
- *Library and Archives Canada Act*, which requires departments to provide their final research reports to Library and Archives Canada within six months of the completion of fieldwork;
- *Public Opinion Research Contract Regulations*, which standardizes the form and content of contracted POR reports;

- *Communications Policy of the Government of Canada*, which identifies mandatory requirements for planning and conducting POR activities (e.g., ministerial approval for POR plans, followed by project registration and contracting through PWGSC);
- *Contracting Policy*, which requires departments to notify PWGSC if their POR project may result in the award of a contract; and
- *Common Services Policy*, which identifies PWGSC as a mandatory common service organization for the coordination and contracting of POR.

On June 9, 2009, the President of the Treasury Board approved additional measures for planning and contracting POR. These include the requirements for departments to:

- obtain ministerial approval for significant non-contracted POR; and
- consult with the Privy Council Office in the development of departmental and agency POR plans.

By applying these procedures, the Government of Canada ensures that:

- funds expended on POR are for projects aligned with government priorities, policies, programs, services and initiatives;
- the bidding process for contracted POR activities is open, fair and transparent, and POR contracts provide value for money; and
- the public's views and needs are understood and taken into account when the government develops policies, programs, services and initiatives.

► ***The Procedures for Planning and Contracting Public Opinion Research*** (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=16491>) support and facilitate the implementation of the **Communications Policy of the Government of Canada** (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12316>). The procedures ensure that POR activities in the Government of Canada are well coordinated, transparent and managed in a way that provides value for taxpayers' money.

STANDING OFFERS *for* PUBLIC OPINION RESEARCH

Under the *Procedures for Planning and Contracting Public Opinion Research*, PWGSC is responsible for developing standing offers and procurement tools for use by multiple departments. In 2009–2010, work was undertaken to develop new POR standing offers that will provide best value for Canadians while meeting the service needs of departments. As the Canadian population continues to diversify in terms of its demographic make-up and newer technologies are adopted, the need to stay abreast with specialized research methods remains highly important and relevant. These factors were taken into account in the development of the new standing offers.

As part of the process, PWGSC consulted with departments and the research industry to ensure that the resulting standing offers included required services and expertise, and provide value for money. The results of this consultation led to a greater number of standing offers tailored to specialized audiences and research techniques.

The standing offers were designed to:

- encourage the participation of all types of POR suppliers including small, medium and large businesses, joint ventures and businesses specializing in target populations (including Aboriginal peoples and ethnocultural populations) from various geographic locations;
- ensure that the Government of Canada has access to a broad range of subject expertise and research specializations with various target groups in Canada (therefore no limits were placed on the number of firms that could submit a response to the Request for Standing Offer [RFSO]);
- react to a rapidly changing technological environment, allowing for the use of a variety of research methodologies (including online techniques); and
- include custom qualitative research, quantitative research and a blend of the two.

The new standing offers for POR were issued on April 1, 2010 and are available for use by departments for research projects with a contract value of up to \$200,000 (including GST or HST). These standing offers were established competitively and are valid for two years with the possibility of three extension periods of one year each. See **Appendix V** for the complete list of new POR standing offers.

GOVERNMENT of CANADA STANDARDS for TELEPHONE and ONLINE SURVEY RESEARCH

Based on the recommendations from the 2005 report of the Auditor General—*Chapter 2 – The Quality and Reporting of Surveys*—POR began work to adapt POR industry standards to specific Government of Canada needs. The primary goal was to maintain and enhance a uniformly high level of survey quality. As a result of this work, PWGSC developed customized *Standards for the Conduct of Government of Canada Public Opinion Research* for telephone and online surveys, which meet or exceed current industry standards. PWGSC's standards provide the government with a harmonized approach to survey quality, including standardized requirements for the various stages of a research project, such as the proposal, data collection and reporting stages.

The standards development process included:

- a review of relevant industry standards, both Canadian and international, to determine which standards were most relevant and where adjustments could be made to meet specific Government of Canada needs;
- two advisory panels on research quality for online and telephone research commissioned by PWGSC (both panels included representatives from government, industry and academia); and
- consultation with Government of Canada departments and the Canadian research industry.

The standards were made available to the public on the **PWGSC Web site** (<http://www.tpsgc-pwgsc.gc.ca/rop-por/index-eng.html>) in November 2009. All firms conducting POR for the Government of Canada are required to meet or exceed these standards. The standards were also included as a requirement for all firms who qualify under the new standing offers for POR. The development of specific POR telephone and online standards ensures that the government maintains a consistent level of survey quality, transparency, and value for money for Canadians in the conduct of this research.

PUBLIC OPINION RESEARCH ACTIVITIES *in the Government of Canada*



BUSINESS VOLUME *in* PUBLIC OPINION RESEARCH

In 2009–2010, the Public Opinion Research Directorate coordinated 148 contracted public opinion research projects worth \$8.3 million, up from 131 projects worth \$8.1 million the previous year. **Appendix I** provides the listing of departments engaged in POR in 2009–2010.

A total of 21 contractors were involved in POR during 2009–2010. A list of contractors engaged in POR is provided in **Appendix II**.

APPLICATION *of* PUBLIC OPINION RESEARCH *by the* GOVERNMENT *of* CANADA

Public opinion research undertaken by the Government of Canada can be divided into three areas of application:

INFORMING CANADIANS

- Advertising research
- Development of communication plans
- Communication product testing
- Web site usability testing

TAKING INTO ACCOUNT CANADIANS' NEEDS

- Market research
- Policy development
- Quality of service and client satisfaction measurement
- Policy and program research

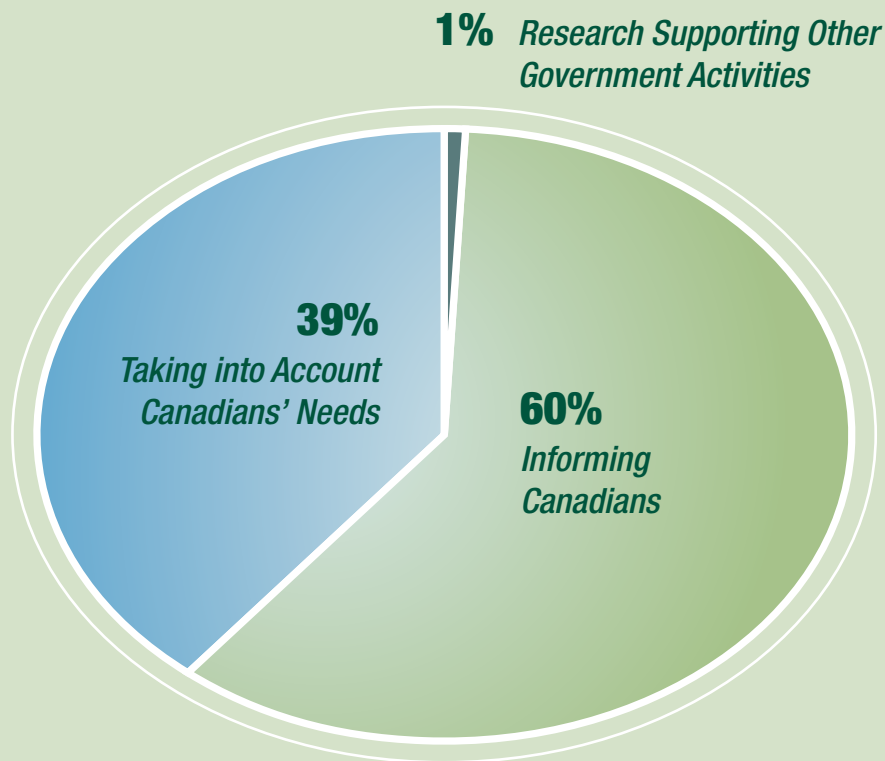
RESEARCH SUPPORTING OTHER GOVERNMENT ACTIVITIES

- Internal organizational research

TABLE 1: CATEGORIES *of* CUSTOM RESEARCH

	CONTRACT VALUE	% CONTRACT VALUE	NUMBER OF PROJECTS	% NUMBER OF PROJECTS
Informing Canadians	\$5,022,512	60%	96	65%
Taking Into Account Canadians' Needs	\$3,234,231	39%	50	34%
Research Supporting Other Government Activities	\$49,052	1%	2	1%
TOTAL:	<u>\$8,305,795</u>	<u>100%</u>	<u>148</u>	<u>100%</u>

FIGURE 2 PERCENTAGE *of* CONTRACT VALUE *by* CATEGORIES *of* CUSTOM RESEARCH, 2009–2010



In 2009–2010, a total of 148 projects were conducted, of which 96 were to provide the Government of Canada with information on its efforts to help keep Canadians informed of government programs, policies and services;

50 projects were conducted to provide information to strengthen policies and programs that take into account the needs of Canadians. The remaining two projects focused on research that supports other government activities.

INFORMING CANADIANS

The government has a duty to explain its policies and decisions and to inform Canadians of its programs and services. POR helps ensure that information about policies, programs and services is clear, realistic and targeted to the appropriate audience. Research includes projects to:

- pre-test government advertising;
- post-test government advertising;
- measure awareness, attitudes and behavioural intentions for the development of information products and communication vehicles, as well as the concepts for these tools;
- test communication products (including evaluation of concepts, messages, content and creative design); and
- develop and refine other information vehicles, such as guides, brochures and Web sites.

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

Post-testing of advertising helps evaluate recall and recognition of advertising, as well as attitude and behaviour changes resulting from major campaigns. Post-testing is mandatory for campaigns with a media buy of \$1 million or more. The information from these studies is used to improve the planning and development of other information campaigns.

In 2009–2010, studies conducted to help inform Canadians accounted for 60 percent of the total contract value of POR. For an example of research for communications strategy development, see Natural Resources Canada's *2009 Alternative and Renewable Fuels Research Study* in the Highlights of Public Opinion Research Projects section of this report.

TAKING INTO ACCOUNT CANADIANS' NEEDS

The government uses POR to identify the need for new or modified policies and programs. This type of research also helps the Government of Canada understand how Canadians relate to these policies and programs. It allows the government to better understand the public's perspective on a given subject, gain knowledge of Canadian's experiences with specific programs, and identify the best approaches to reach out to Canadians. In turn, tailored program development and outreach initiatives help Canadians make informed decisions about their health, safety and security.

This category includes:

- **POLICY DEVELOPMENT RESEARCH**, in which the government collects information on attitudes and opinions to develop public policies that reflect the needs and wants of Canadians or specific stakeholder groups affected by those policies.
- **MARKET RESEARCH**, which involves collecting information on attitudes, opinions and product attributes that will help in the design and delivery of programs and services and, in some cases, decisions regarding user fees.
- **POLICY AND PROGRAM REVIEWS**, in which the government uses surveys and focus groups to evaluate the effectiveness and usefulness of programs and services and the factors that are related to their utility.
- **QUALITY OF SERVICE AND CLIENT SATISFACTION STUDIES** that help the government understand users' experiences, interests in and priorities for services, key areas requiring improvement or change, drivers of client satisfaction, optimal sources of information for clients, as well as current and future trends.

Program and service evaluation research enables the government to track quality and service indicators, report on the progress and success of its programs and services, and identify possible areas for improvement. In 2009–2010, projects representing 39 percent of total POR contract value were conducted for this purpose. For an example of research pertaining to program review research, see Canadian Heritage’s study, *Canadians’ Awareness of the 2010 Olympic and Paralympic Winter Games*, in the Highlights of Public Opinion Research Projects section of this report.

RESEARCH SUPPORTING OTHER GOVERNMENT ACTIVITIES

This category includes internal organizational research, such as employee surveys or focus groups to help departments of the Government of Canada understand the needs and expectations of its employees. For example, during the reporting year, with the aim to improve the quality of its services, the government conducted research with its employees to survey their opinions and measure their satisfaction with workplace and career development opportunities. The research is helping to create a more productive working environment.

In 2009–2010, research supporting other government activities accounted for one percent of total POR contract value.

APPROACHES to CUSTOM RESEARCH

Custom research accounts for all POR work undertaken during the 2009–2010 fiscal year. Custom research is work commissioned for specific departments for the exclusive use of government. Commissioning organizations hold the intellectual property rights to reports and other materials generated by each project. The reports resulting from all custom research projects conducted for the Government of Canada are made available to other federal organizations and to the public through Library and Archives Canada within six months of the completion of field work. The Library of Parliament makes them available to Parliamentarians and to the media.

Research can be conducted using quantitative and qualitative approaches, or a combination of the two.

QUANTITATIVE RESEARCH

A quantitative approach is used when descriptive or inferential statistics are required. Results from this research approach can, in most cases, be generalized to the population being studied.

Quantitative research can be used to:

- evaluate the effectiveness of a program, service or advertising campaign;
- measure customer satisfaction;
- identify market segments; and
- track changes in the public's attitudes, behaviour and use of products.

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

In the reporting year, 43 percent of research fell into the category of quantitative research.

The National Defence study *Canada First Defence Strategy and Military Procurement* is a good example of a study conducted using quantitative research methods. Additional details on this study are presented in the Highlights of Public Opinion Research Projects section of the report.

QUALITATIVE RESEARCH

A qualitative approach is used to gain insight into people's intentions and perceptions. It explores their opinions on particular topics in more depth than is generally possible with a survey.

Qualitative research can be used to:

- examine clients' knowledge of, and experiences with, products, programs and services, thereby informing the creation of new products, programs and service concepts;
- test the clarity and comprehension of the content or format of a publication or Web site; and
- pre-test concepts for an advertising campaign.

The information yielded from qualitative research cannot be generalized to the population being studied. Commonly used types of qualitative methodologies include focus groups, personal interviews and small discussion groups.

The Canada Food Inspection Agency's study *Usability Testing of the Consumer Centre Web site*, described in the Highlights of Public Opinion Research Projects section of the report, was conducted using qualitative research methods.

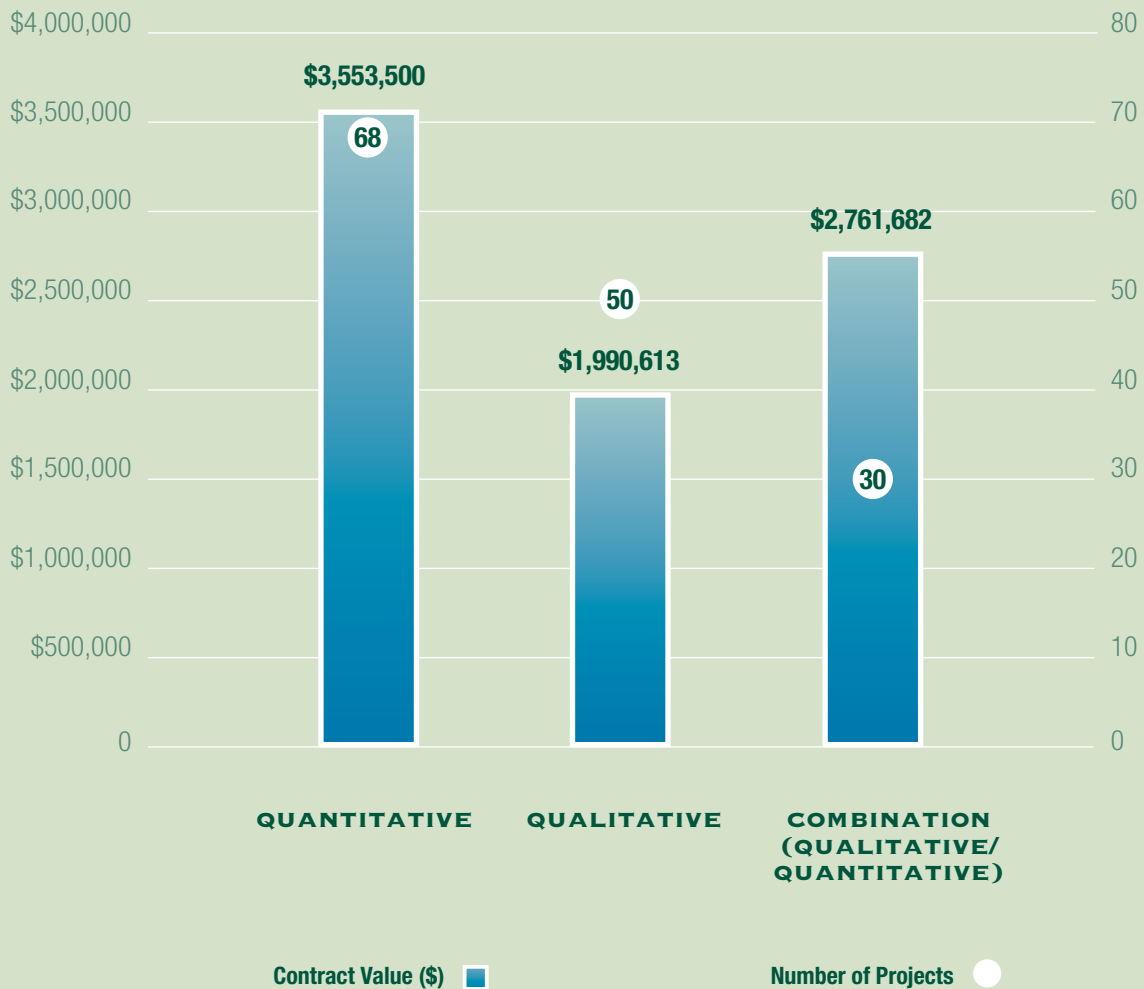
In 2009–2010, 24 percent of custom research fell into this category.

Projects consisting of a combination of quantitative and qualitative research accounted for the remaining 33 percent of projects undertaken during the fiscal year.

TABLE 2: APPROACHES *to* CUSTOM RESEARCH

	CONTRACT VALUE	% CONTRACT VALUE	NUMBER OF PROJECTS	% NUMBER OF PROJECTS
Quantitative	\$3,553,500	43%	68	46%
Qualitative	\$1,990,613	24%	50	34%
Combination (quant./qual.)	\$2,761,682	33%	30	20%
TOTAL:	<u>\$8,305,795</u>	<u>100%</u>	<u>148</u>	<u>100%</u>

FIGURE 3 APPROACHES *to* CUSTOM RESEARCH



PROCUREMENT METHODS *in* PUBLIC OPINION RESEARCH

The Government of Canada uses various procurement methods to contract public opinion research. Standing offers were established competitively for the three main approaches to custom research (qualitative, quantitative and a combination of the two). **Appendix IV** includes a complete list of contractors on the standing offers that were in effect during the 2009–2010 fiscal year.

Contracts issued through standing offers accounted for 96 percent (\$7,937,835) of the total value of POR contracts in 2009–2010. The value of contracts secured through public tenders (MERX) was \$97,880, or one percent of the total. Specialized research services accounted for \$270,081, or three percent of the total. These research services are low dollar-value requirements (below \$25,000) not procured through public tender or the government’s existing standing offer list for POR.

GEOGRAPHIC REACH *of* SURVEYS *and* LOCATIONS *of* FOCUS GROUP STUDIES CONDUCTED *for the* GOVERNMENT *of* CANADA *in* 2009–2010

The map, *Government of Canada Public Opinion Research 2009–2010: Geographic Reach of Surveys and Locations of Focus Groups*, shows the areas surveyed by the Government of Canada in 2009–2010 and the locations of focus groups conducted during the reporting year. (This information is from studies undertaken in 2009–2010 for which final POR reports were available at the time of publication of this report. Additional details on the number and locations of focus groups are presented in **Appendix III**.) Many telephone surveys included all area codes in Canada. Residents of all provinces and territories with landline telephone numbers were included in the samples.

TABLE 3: PROCUREMENT METHODS

	CONTRACT VALUE	% CONTRACT VALUE	NUMBER OF PROJECTS	% NUMBER OF PROJECTS
Standing Offers	\$7,937,835	96%	129	87%
Public Tenders (MERX)	\$97,880	1%	2	1%
Other Methods	\$270,081	3%	17	11%
TOTAL:	<u>\$8,305,795</u>	<u>100%</u>	<u>148</u>	<u>100%</u>

- Areas covered by surveys
- Locations of focus groups
- 0.4 to 9.9 persons per square kilometre
- 10 and over persons per square kilometre



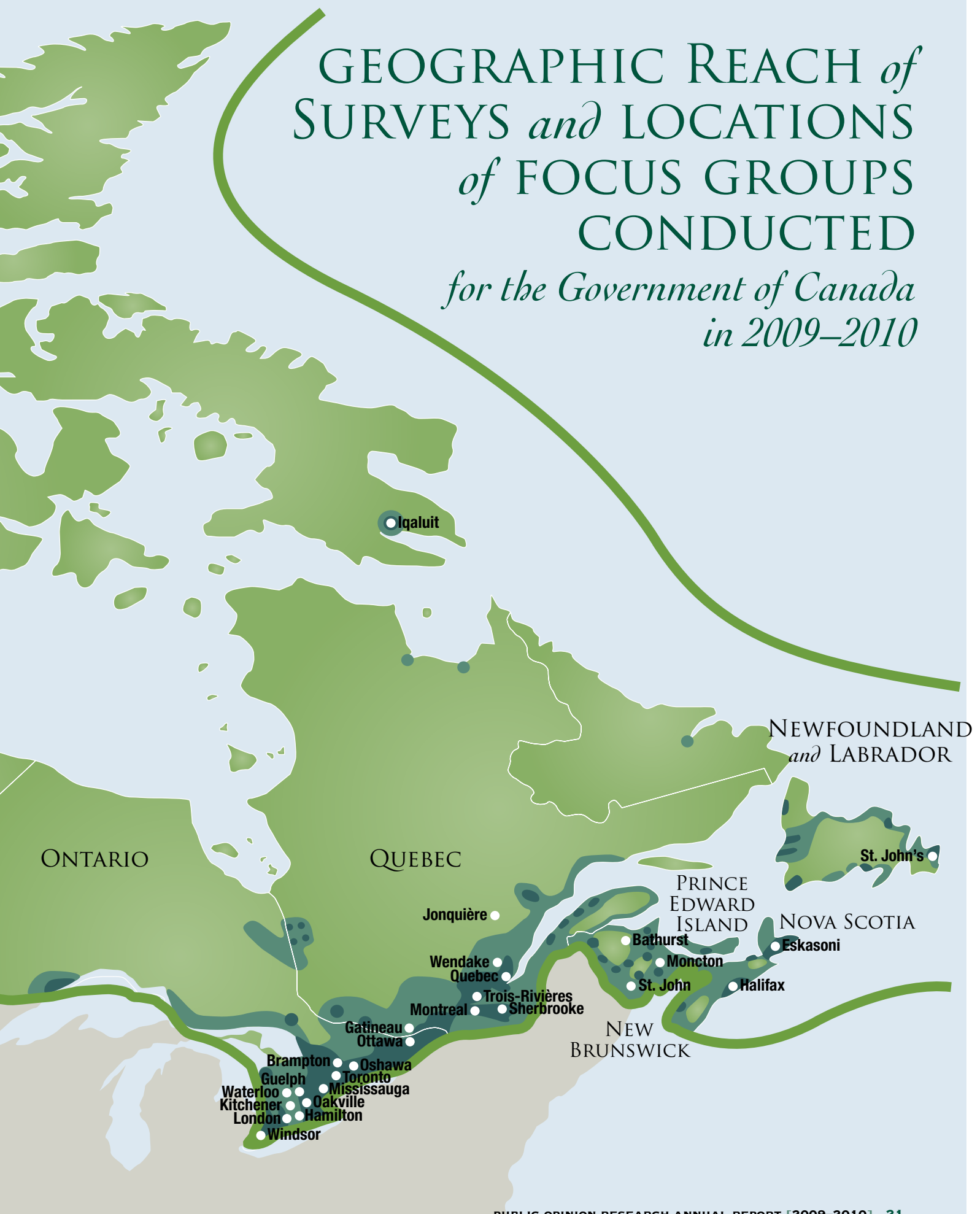
This map shows the locations of focus groups conducted for the Government of Canada in 2009–2010. The areas shaded dark green (■) represent zones of high population density, which are urban areas and surrounding districts, where by far the largest amount of Canadians live. The areas shaded medium green (■) represent zones of medium population density where a smaller proportion of the Canadians live. The areas

shaded light green (■) represent zones of light population density where a relatively small proportion of Canada’s population lives.

The map shows that the vast majority of the focus group studies were held in the areas dark green (■): i.e. urban areas and surrounding districts, where the majority of the Canadian population resides.

GEOGRAPHIC REACH *of* SURVEYS *and* LOCATIONS *of* FOCUS GROUPS CONDUCTED

*for the Government of Canada
in 2009–2010*



TARGET GROUPS REACHED

POR is conducted among a wide variety of audiences. Table 4 presents 38 specific target groups reached by POR studies conducted in 2009–2010.

TABLE 4: TARGET GROUPS REACHED

Aboriginal Peoples	Northern Residents
Business and Professionals	Parents
Canadian Consumers	Parents with Children Living at Home
Canadians Considering Retirement	Partners, Clients and Stakeholders
Canadians with Chronic Diseases	Passport Holders and Non-passport Holders
Caregivers	Persons with Disabilities
Charity Donors	Pregnant Women
Educational Institutions	Primary Food Shoppers
Employed Canadians	Producers
Foreign Consumers and Retailers	Seniors
General Population	Smokers
Government of Canada Employees	Students
GPS Users	Tradespersons
Homeowners	Travel and Tourism Industry Representatives
Immigrants and Newcomers	Travellers
Internet Users	Unemployed Canadians
Job Seekers	Visible Minorities
Lower Income Individuals	Women
Mothers	Youth

SHARING KNOWLEDGE



KNOWLEDGE *within* GOVERNMENT: *The* COMMUNITY *of* PRACTICE

The Public Opinion Research Directorate continued to coordinate the federal Community of Practice for public opinion research and participate in other interdepartmental working groups during 2009–2010. The Community of Practice, a network of specialists in public opinion research in the Government of Canada, continually provides a synergy of knowledge and best practices through communication and sharing of information across the government. In turn, increased capacity within this community contributes to high quality research that reflects the views of Canadians, sound management of resources and provides value for money.

KNOWLEDGE MANAGEMENT UNIT

The Knowledge Management Unit fosters partnerships and the sharing of public opinion research across the federal government. The unit develops and manages the on-line Research Information Management System (RIMS) database, and produces the annual report, research guides and online resources. It also organizes information sharing meetings and sessions for the POR interdepartmental Community of Practice.

The community includes POR practitioners from 57 departments. It meets regularly to share information and address issues of common concern, such as survey quality and response rates, procurement issues, emerging research techniques, new survey software, joint initiatives and partnerships, and new legislation and policy requirements.

PORD's Knowledge Management Unit fosters education and capacity-building within the Community of Practice. It continued its speakers program during the 2009–2010 fiscal year. Online research has been a particular focus of this program, as the Government of Canada introduced, for the first time, a set of standards for online POR. Online research was also included for the first time in the new Standing Offer for Public Opinion Research, which came into effect on April 1, 2010. In 2009–2010, this medium was used in 31 qualitative and quantitative projects of the 148 POR projects conducted for the Government of Canada.

PORD's 2009–2010 speakers program covered the following subjects:

- Questionnaires for Online Surveys
- Attitude Scales and Online Surveys
- Is a Large Sample Always Necessary?
- Data Consistency and Usability in Online Surveys
- How to Conduct Focus Group Projects
- Software for Online Surveys
- New Research in Online Surveys
- Telephone Survey Response
- Predictive Analytics

Surveys conducted with attendees at these sessions have revealed that, on average, nine out of ten consider these information sessions to be useful for their work.

A course entitled Managing Public Opinion Research: Policies and Procedures was also held four times. The offering of this course helped public opinion researchers in the Government of Canada keep up to date with the changes in policies over the previous three years and the new requirements for POR in the Government of Canada.

KNOWLEDGE SHARING *with* the MARKETING RESEARCH PROFESSION

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

- ensuring that all Government of Canada surveys contracted through POR standing offers are registered with the MRISA Survey Registration System;
- consultations on research quality;
- identification of research best practices;
- participation in research studies on methodological issues of concern to the marketing research profession; and
- holding courses on public opinion research that are directly relevant to federal government employees.

▶ CANADA'S MARKETING RESEARCH INDUSTRY

The marketing research industry in Canada accounted for \$721 million in research activities in 2009, according to the MRISA, the national association for the marketing research industry and the marketing research discipline.

The Canada-wide Marketing Research and Intelligence Association (<http://www.mria-arim.ca/ABOUT/default.asp>) counts among its members over 1,800 practitioners and 400 corporate members, which include small to large research firms and private and public sector buyers of research services. MRISA's mission is to promote a positive environment in which the industry can operate effectively and for the benefit of the public.

RESULTS *for* CANADIANS

Since December 2006, the *Library and Archives of Canada Act* (<http://laws.justice.gc.ca/eng/L-7.7/page-1.html>) has required federal institutions to deposit their final research reports with LAC within six months of the completion of fieldwork. Under the *Communications Policy of the Government of Canada* (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12316>), institutions must also submit—within six months of the completion of public opinion research fieldwork—copies of final reports and executive summaries in both official languages to Library and Archives Canada and Library of Parliament. These submissions are made through the Library and Archives Canada Web site (<http://www.porr-rrop.gc.ca>).

The LAC Web site provides access to information about public opinion research contracted after August 1, 2006 for which the final reports have been submitted to LAC. In 2009–2010, 135 projects were completed and their reports submitted to LAC. These reports include studies completed before and during the 2009–2010 fiscal year.

Data files from some Government of Canada public opinion research studies are available to the public through the Canadian Opinion Research Archive (CORA) of Queen's University (<http://www.queensu.ca/cora/>). The aim of this archive is to maximize the usefulness of POR studies to Canadian society by making the material available to social scientists across the country. CORA contains hundreds of surveys dating back to the 1970s, as well as general information on public opinion research.

Canadians can also get information on all the public opinion research activities conducted by the Government of Canada by visiting the POR section of the Public Works and Government Services Canada's Web site (<http://www.tpsgc-pwgsc.gc.ca/rop-por/>). The Web site contains:

- annual reports on POR;
- Government of Canada standards for telephone and online survey research;
- audit and evaluation reports;
- POR best practices; and
- links to the LAC Web site for POR studies.

► *PORD's Knowledge Management Unit has helped develop a new program at Algonquin College in Ottawa entitled **Marketing and Business Intelligence Research** (http://extraweb.algonquincollege.com/fulltime_programs/programOverview.aspx?id=1303X01FWO&). In 2009–2010, PORD was a member of the Advisory Committee for this program, which started in the fall of 2009 and will be offered again in 2010–2011. The program prepares students for careers in the private and public sectors, and to write the examination for the MRIA's CMRP designation. Eighteen students completed the program in the first year.*

CONTINUING EDUCATION

The Public Opinion Research Directorate understands the importance of training and education in its field of expertise and is committed to developing POR skills and knowledge levels among researchers in the Government of Canada. PORD is working with MRIA to enable Government of Canada researchers to eventually attain the Certified Marketing Research Professional (CMRP) designation through MRIA. During the reporting year, 10 of the 12 mandatory CMRP courses were available to federal public servants (additional courses will be available in the near future):

- Introduction to Marketing Research;
- Marketing Research Design: An Applied Course;
- Advanced Qualitative Marketing Research Techniques;
- Competitive Intelligence, Competitor Benchmarking and Mystery Shopping;
- Questionnaire Design;
- Ethical Issues and Privacy in Marketing Research;
- Online Research: Best Practices and Innovations;
- Marketing Research Statistics and Data Analysis;
- Qualitative Marketing Research; and
- Marketing Management for Researchers.



HIGHLIGHTS *of* PUBLIC OPINION RESEARCH PROJECTS



This section contains a review of public opinion research studies undertaken by various departments across the Government of Canada.

AGRICULTURE *and* AGRI-FOOD CANADA

Consumer Selection of Labelled Products in a Simulated Grocery Retail Setting

This research project assessed the importance and impact of Canadian origin in consumer food purchase decisions, and how best to present Canadian origin so that it contributes to a purchase. The study also sought to determine the influence of other label and product properties in product purchase, including product category, price and brand.

A study was conducted among a representative sample from an online panel of Canadians with primary or shared responsibility for purchasing food for their households. A total of 1,713 persons participated in the study, which was conducted between March 26 and March 29, 2010. The sample was non-probability, which means there are no margins of error reported.

The online shopper simulation consisted of three phases, in which all the same people took part: an online survey consisting of a shopper simulation, a “highlighter exercise” and an online questionnaire. In the first phase, participants were presented with 20 different scenarios in a simulated grocery retail setting. In each scenario, participants were asked to select one product they would buy within specific categories.

Participants were able to look at each product in detail, flip the product to see the reverse and side label as well as the retail price. Participants were recorded picking up, examining and purchasing items.

During the second-phase highlighter exercise, participants were asked to look at product images displayed on computer screens and identify, by clicking on areas of the packaging, the part of the packaging or labelling that would catch their attention if they saw it on a shelf. Each participant was shown four products.

In the final phase, participants were asked open-ended questions about the factors they consider when purchasing food, the importance of product origin information, and their understanding of various Canadian origin claims and grading standards.

The study concluded that while participants claim price is the key factor, the shopping simulation shows that consumer purchases are actually more influenced by brand and Canadian origin labelling. It was also found that of the numerous statements indicating Canadian origin tested, “Made with 100% (specific Canadian ingredient)” is easily the most effective, both in terms of participants’ understanding of its meaning, as well as an influencer of food purchase behaviour.



Further, a very strong majority of participants believe that it is important for Canadian origin information to be displayed on labels, and that they would be more likely to purchase a product if it is labelled as Canadian.

The results of this research project are intended to inform the Domestic Canada Brand Initiative to build a Canada brand domestically. They will provide practical information to industry and stakeholders on how to promote the Canadian origin of food products, in line with Product of Canada guidelines, and in ways that will resonate with Canadian consumers and ultimately increase sales.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/agriculture_agri-food/2010/096-09-e/summary.doc



CANADA REVENUE AGENCY

CRA Concept and Message Testing 2009

The Canada Revenue Agency (CRA) undertook qualitative research to evaluate materials developed for Phase III of the Tax Relief Measures advertising campaign. Research was required to determine which of two conceptual approaches (television and print advertisements) would be most effective in:

- promoting awareness of the tax relief measures introduced by the Government of Canada;
- increasing the number of people who claim tax credits and benefits to which they are entitled;
- raising the level of awareness that the Government of Canada is committed to delivering tax relief to families and individuals; and
- increasing the number of Canadians who believe that filing an income tax return may be financially beneficial to them.

The research was conducted in two successive parts, each time with the same target audience: the general Canadian population, ensuring a mix of low- and middle-income Canadians, individuals with school-age children, seniors, homeowners, and tradespersons. The first part included eight focus groups held September 28 and 29, 2009; two each were conducted in the following cities: Montreal, Toronto, Halifax, and Vancouver. The purpose of the first part was to determine which conceptual approach would be the most effective in achieving the research objectives. The second part was to test the selected creative approach. Four focus groups were conducted on January 13, 2010: two in Toronto and two in Montreal. Each group consisted of ten members; all were Internet users, Canadian citizens 18 years and older, had submitted a personal tax return for the past year, and are involved in at least two of the following three activities in a month: watch television, read newspapers or magazines, and listen to the radio.

Two concepts were created following the first part of the project: *Fingertips* and *Your Name*. Both concepts were rated positively by most participants; however, the *Fingertips* concept was preferred over *Your Name*. *Fingertips* was found to be up-beat and positive. The first slide of the ad introduced the topic and the use of first person narration gave a testimonial-like character. This concept was also well received for its use of multiple voices throughout the ad rather than one narrator. Those who preferred *Your Name* did so because they found it was clearer and more informative due to a slower pace throughout the ad. Other positive attributes included its up-beat tone and style. A picture of a crowd was also used at the end of the ad, which signified the widespread and inclusive nature of tax credits. Those who preferred this ad noted that the definitive amounts of savings and the slogan “Tax savings with your name on them” were also positive attributes.

The study also showed that the television ads were preferred over the print ads. The TV ads were well received because they were easy to understand, informative, up-beat and positive. One aspect of the television ads that appealed to participants was the image of people reaching up to grab labels identifying savings. The radio ads were also well received; participants noted that they were essentially the TV ads adapted to radio. Some individuals preferred the radio ads over the television ads as they felt that they were clearer, the voiceover more appealing and were slower paced.

The results from the study were used to ensure that the announcements effectively communicated the messages to the target audience, that the creative concept resonated with the target audience, and that the population would be made aware of the various benefits and credits to which they may be entitled.

http://epe.lac-bac.gc.ca/100/200/301/pwgs-c-tpsgc/por-ef/canada_revenue_agency/2009/040-09/summary.doc

CANADIAN FOOD INSPECTION AGENCY

Usability Testing of the Consumer Centre Web Site

The primary objective of this study was to assess the overall look and feel of the Canadian Food Inspection Agency (CFIA) Consumer Centre Web site. The study sought to:

- determine whether the layout and flow of the information are logical;
- assess the content of the Web site for ease of understanding, usefulness, relevance, credibility and comprehensiveness;
- identify information gaps for consumers;
- assess the ease of navigation of the Web site; and
- assess the visual appeal of the Web site.

A qualitative research approach was used to meet the research objectives. Four focus groups consisting of both men and women were conducted in Toronto and Montreal on August 5 and 6, 2009 respectively. The participants were primary household shoppers who regularly access the Internet for food safety and health information. In each city, one group was composed of individuals who use the Internet one to two hours per week and the second group was composed of individuals who use the Internet more than two hours per week.

Because this project was qualitative in approach, the research report does not give margins of error and the results are not projectable to the population at large.

Most participants in the two Toronto groups and most in the Montreal group composed of less frequent users felt that the site was inviting and intriguing. They found a wealth of information on the Web site and felt that the colours and visual aspects were soothing and secure, but

more importantly a credible source with regard to food safety. In contrast, most of the participants in the Montreal group composed of heavier Internet users tended to view the Web site as less interesting. They feared information would be difficult to find, resulting in a less favourable visitor experience.

Nevertheless, the study found that site content had a universal appeal among participants and represented the key strength of the site. Other strengths included breadth and depth of information regarding key issues and concerns such as food recalls, allergens, and food safety. Most participants found the Web site comprehensive with no apparent information gaps. On the other hand, some content with regard to the industry's role in maintaining food safety was considered too technical and detailed. Overall, most participants indicated they would return to the site and would recommend it to others.

With respect to the ease of navigation, logic and flow of information, most participants were able to complete tasks relatively easily on the topic of key information needs related to food recalls and best-before dates. However, the research indicated that there were several difficulties with regards to logic, layout, translation and flow, which, if corrected, could have a substantial positive impact on the user experience.

Following completion of this project, the research findings were used to enhance the new Consumer Centre Web site, including overall look and feel, visual appeal, navigation and content. For instance, the main page of the Web site was shortened, resulting in less scrolling and greater prominence for photos. Paragraphs of text that were considered superfluous were removed, helping to reduce the amount of text and ensure a more organized Web site.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/canadian_food_inspection_agency/2009/017-09/summary.pdf

CANADIAN HERITAGE

Canadians' Awareness of the 2010 Olympic and Paralympic Winter Games

Prior to the 2010 Olympic and Paralympic Winter Games that took place in Vancouver and Whistler in February and March 2010, the Department of Canadian Heritage conducted this research study, which focused on Canadians' perceptions of the federal government's role in the hosting of the Games and the perceived impact the Games would have on Canada. More specifically, the purpose of this research project was to:

- understand the extent to which Canadians were aware of the 2010 Winter Games;
- measure awareness of the role the Government of Canada played in hosting the event; and
- explore Canadians' perceptions of economic, social, cultural and sport benefits associated with the events.

Fieldwork was completed from February 5 to February 15, 2009 using a national telephone omnibus survey with a total of 2,036 respondents 18 years of age or older. The data were weighted by age and gender to replicate the actual population distribution across Canada, with an associated margin of error of +/- 2.2 percent.

Results from the study showed that 82 percent of respondents correctly cited Vancouver and/or Whistler as the host city. Furthermore, almost three quarters (73 percent) of Canadians believed that the federal government sponsored the 2010 Olympic and Paralympic Winter Games. When asked about the perceived impact of the 2010 Winter Games on the country, most Canadians believed that the most positive impact was going to be on tourism (90 percent), Canada's image



worldwide (85 percent), and national pride amongst Canadians (83 percent). These were also the top three impacts found in the initial study conducted in June 2007 on the same subject. Residents of British Columbia had slightly more negative views on how the 2010 Winter Games will impact the community and country. Most of the overall results are very consistent with the June 2007 study. There were, however, fewer Canadians who felt that the Games would have a positive impact on trade and investment opportunities and on economic opportunities for communities across the country.

The 2010 Olympic and Paralympic Winter Games Federal Secretariat used the results of the research to measure both the extent to which Canadians appreciated the role of the government in supporting the Games, and the benefits and legacies that were expected to result. These measures, in particular the trend of changes in awareness since 2007, were used to analyze the impacts of the Games. They will also be used as factors in the 2010 horizontal summative evaluation and in communications messaging and planning.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/canadian_heritage/2009/064-08-e/summary.pdf

FOREIGN AFFAIRS *and* INTERNATIONAL TRADE CANADA

Tracking Survey of US Importers and Exporters' Perceptions of Canada's Asia Pacific Gateway

This research project was conducted to evaluate American exporters and importers' views and perceptions of Canada's Asia Pacific Gateway Corridor (APGC), and other Canadian Gateways. Specific objectives of this project were to:

- gauge the knowledge level and opinions of relevant stakeholders in the U.S. that are most likely to use Canada as a gateway for international trade between the U.S. and the Asia Pacific region in comparison with the previous year;
- compare the perceptions of U.S. importers and exporters—and other stakeholders—about Canadian ports with those of U.S. ports; and
- understand U.S. companies' awareness of Canadian programs and their perceptions of a new and significant development, the expansion of the Panama Canal, to be completed in 2014.

The study engaged 329 U.S. executives in a 15-minute online survey. Survey respondents were employed at the time of the survey in importing, exporting, freight forwarding, third- and fourth-party logistics, shipping lines, and independent transportation consulting firms. Participation was by invitation only; respondents' profiles included job title, job function, company type, company size and business revenue. To

ensure unbiased opinions, the name of the survey sponsor was not revealed to respondents. Fieldwork was completed between February 10 and March 16, 2010. Since the sample does not represent all businesses that use the APGC, it is considered a non-probability sample and a margin of error was therefore not calculated for this survey.

The results of the survey showed that highlighting the benefits of shorter transit times, a low level of congestion and competitively priced rail transit would be effective when promoting Canadian ports to U.S. companies. Additionally, the results highlighted ongoing perceptions including concerns over border delays and considerations for the expansion of the Panama Canal. The following attributes had the greatest importance among U.S. executives: quick, accurate, and reliable customs process; minimized cost across the supply chain; and high security at the port.

This survey will help Foreign Affairs and International Trade Canada and other Canadian stakeholders to better market Canadian trade routes, in turn strengthening Canada's position in global trade. This research project also allowed the department and its stakeholders to better understand what U.S. executives look for in their ports of choice and, based on those criteria, how Canadian ports were perceived. Survey results will help effectively market the strengths of Canadian ports as key gateways linking North America to Asia and Europe.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/foreign_affairs_intl_trade/2010/076-09/summary.doc

HEALTH CANADA

Survey of Canadians' Knowledge and Behaviour Related to Food Safety

To increase awareness and knowledge of the health risks associated with unsafe food handling practices and food-borne illness, Health Canada is developing a comprehensive social marketing strategy. The strategy aims to influence awareness, knowledge, attitudes and behaviours of Canadians, particularly at-risk groups such as seniors, pregnant women, immuno-compromised individuals, and parents of children under six years of age. This research project helped identify information gaps among the populations that are most at risk, and helped determine the best methods for passing on important information.

The project consisted of a telephone survey carried out between January 13 and January 28, 2010. In total, 1,536 Canadians were surveyed (approximately 300 from each target group), which represents a margin of error of +/- 2.5 percentage points, 19 times in 20.

Survey results showed that Canadians expressed high levels of self-rated confidence and awareness of food safety information. Seventy-six percent agreed that they have the necessary information in this regard, and about three in four indicated they have heard a great deal about proper cooking and cooling instructions (77 percent), safe food handling (74 percent), and proper storage of foods (73 percent). In general, Canadians also have a fairly good understanding of many food-borne illness issues. Eighty-five percent correctly believe that most food-borne illnesses can be prevented by cooking food thoroughly. However, survey findings also reveal some gaps in Canadians' knowledge of safe food handling practices. For instance, 43 percent of Canadians believed—erroneously—they can tell if a food can cause food-borne illness by its look, smell or taste.



Results from the study also suggest that Canadians engage in a wide range of safe food practices, with some notable exceptions. The majority of Canadians say they always wash their hands before preparing food (83 percent) and always do so after preparing meals (75 percent). However, only 34 percent of Canadians say they never eat eggs with runny yolks, 55 percent say they never or rarely wash their reusable grocery bags, and 66 percent do not use a food thermometer when cooking food.

When asked about their beliefs of being at greater risk than average for complications from food-borne illness, a majority in all four at-risk groups (ranging from 63 percent to 87 percent) did not believe so, although the immuno-compromised group (28 percent) and pregnant women (27 percent) were more likely to believe that they are at greater risk.

The study also explored the most effective ways to communicate food safety information to Canadians. Results reveal that traditional media such as newspapers, radio, TV or other media (42 percent) are the primary source of information for food issues among Canadians, followed distantly by Web sites (24 percent), although significant variation in responses exist among the target groups. For instance, 40 percent of pregnant women mention Web sites as their primary source of information, while seniors say they primarily receive their information on food issues through traditional media (57 percent).

The results of this study allowed Health Canada to establish benchmarks that will be used to track the effects of a social marketing campaign and provide research intelligence that will assist in the development of evidence-based communications strategies and tactics for use during an outbreak of a food-borne illness. Additionally, the results provided the department with a better understanding of consumers' awareness, knowledge and behaviours as they relate to food safety. This understanding will inform the development of messages that are specific, relevant to the audience and that will engage Canadians to maintain and improve their health. As a result, Canadians will be more informed and will increase the use of safe food handling practices with the long-term goal of decreasing the incidence of food-borne illness in Canada.

<http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/health/2010/070-09/summary.pdf>

Perceptions and Intentions of Canadians on Seasonal and H1N1 Vaccines

Health Canada conducted research to support the Public Health Agency of Canada's Pandemic Risk Communications Strategy. The research sought information on Canadians' knowledge, perceptions and behavioural intentions regarding the H1N1 and seasonal influenza vaccines. More specifically, qualitative and quantitative research methods were used in pursuit of the following research objectives:

- examine awareness of the anticipated H1N1 and seasonal influenza vaccines;
- explore behavioural intentions related to these vaccines;
- examine potential scenarios and their impact on behavioural intentions;
- explore potential motivations for and barriers to taking the H1N1 vaccine; and
- assess levels of concerns with both vaccines.



Six focus groups were conducted between October 13 and 22, 2009 with the general public in Montreal, St. John's and Saskatoon, and eight focus groups with First Nations and Inuit populations in Saskatoon, Rankin Inlet (Nunavut), Sioux Lookout (Ontario), and Manawan (Quebec) prior to the roll out of the H1N1 vaccine. Two focus groups were conducted in each centre: one with participants aged 18 to 29; and one with participants aged 30 and over. Parents, pregnant women and those with underlying health conditions were represented in all centres. Because the focus groups were qualitative in approach, the results are not projectable to the population at large.

Quantitative research was conducted between October 8 and 26, 2009 in conjunction with the qualitative portion of the project; 4,044 Canadians 16 years of age or older completed the survey by telephone using the random digit dialling technique. The associated margin of error was +/- 1.5 percent, 19 times out of 20. The sample was stratified nationally to include 300 interviews in each province and 100 interviews in each territory, with the exception of Quebec and Ontario, where 500 and 800 interviews were conducted respectively.

Results from the study revealed that 31 percent of Canadians typically receive the flu vaccine on an annual basis. Those most likely to get the vaccine on a routine basis are women, seniors, and those with a health condition. Reported usage of the vaccine was highest in Nova Scotia (38 percent), Ontario (36 percent), and Prince Edward Island (36 percent). Parents with university education (41 percent) were more likely to have their children vaccinated, along with parents with children between the ages of two and eleven (40 percent).

In the weeks leading up to the approval and roll out of the H1N1 vaccine, which occurred in late October 2009, many Canadians were unsure of whether or not to get the vaccine. An equal split was seen between those very likely to get the vaccine (36 percent) and those who were very unlikely to get it (also 36 percent).

Results from the focus group portion of the study revealed that most participants would make the same decision for their children as they would for themselves in terms of obtaining the H1N1 vaccine. Many participants also reported that they would wait to see what happened in the first weeks of the new wave of the vaccine before making the decision of whether or not to get vaccinated.

Just over half of Canadians (58 percent) said they had enough information to be able to make the decision about whether or not to get vaccinated. Among those who did not feel adequately prepared at the time, interest was highest in information about the side effects of the vaccine (50 percent), followed by information about the effectiveness of the vaccine (27 percent) and about the amount of testing performed leading up to the approval of the vaccine (19 percent). Respondents who said they had enough information were considerably more likely than those who felt they did not have enough information to say they would be very likely to get the vaccine (44 percent versus 24 percent).

Communication product testing revealed that, overall, the H1N1 vaccine messages that addressed side effects in a matter-of-fact and straightforward way scored the highest ratings. Technical and detailed messages did not test as well with participants who felt that they introduced more confusion and questions than they answered. The overall message of H1N1 vaccination scored among the most convincing reasons to get the vaccine. Generally, all of the ads (print, radio and television) tested reasonably well and did not produce any significant negative reactions.

This research was used to inform the development of communications and marketing messages, products and dissemination tactics by producing timely, up-to-date and easily understood information, all of which was essential in responding to the H1N1 outbreak.

<http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/health/2009/041-09/summary.pdf>

2009 Baseline Survey about Pandemic Influenza among First Nations On-reserve and Northern Inuit

This study was conducted to assess First Nations' and Inuit perceptions, understanding, risk and levels of concern regarding the H1N1 flu virus. The study sought to identify behaviour associated with preparedness, infection prevention and control with respect to H1N1. The study also served to determine information needs with respect to H1N1 and assess the expectations of First Nations residents and Inuit in the North in the event that the H1N1 flu virus would have become more severe.

The survey was conducted by telephone between August 31 and September 30, 2009 with 701 First Nations people on-reserve and 200 Inuit living in Northern Canada. The margin of error from the survey with the First Nations people was +/- 3.7 percent, 19 times out of 20; the margin of error for the Inuit sample



was +/- 6.9 percent, 19 times out of 20. Responses were weighted by province or region, age and gender to ensure that the results were representative and proportionate to each population.

The results of the study revealed that almost all First Nations people living on a reserve (93 percent) and Inuit living in the North (88 percent) had heard of the H1N1 flu virus, usually through traditional media. Despite the high level of awareness, H1N1 was not a prominent community health concern for First Nations people living on a reserve at the time of the survey, with only four percent of respondents identifying the virus as a top-of-mind serious health problem. The comparatively higher concern for H1N1 among Northern Inuit appears to be at least partly related to greater awareness of the impact the virus had in their communities.

Although First Nations people and Inuit self-rate their knowledge of H1N1 conservatively, both populations were fairly knowledgeable about the symptoms of H1N1 and how the virus is transmitted. In both reserve and Inuit communities, three in four of those aware of H1N1 identified at least one correct symptom. At least eight in ten knew that it is possible to get H1N1 by being in close contact with someone who has the virus or by contact with an object touched by them.

The study showed that First Nations people on-reserve and Inuit living in the North were aware of a number of ways to reduce the risk of getting or spreading H1N1 and had taken steps to protect themselves and their families against H1N1. Although individuals were not consciously thinking of a vaccine as a strategy to protect against H1N1 at the time, most First Nations people on-reserve (62 percent definitely, 15 percent probably) and Northern Inuit (53 percent definitely, 14 percent probably) who were aware of H1N1 said they planned to get vaccinated once the H1N1 vaccine was made available.

According to the study, not every respondent who was aware of H1N1 was motivated to become informed about the virus, although some respondents have made previous efforts to learn about it. Both First Nations people on-reserve and Northern Inuit indicated that they would most likely to turn to their local health clinic or nursing station to find information on H1N1, followed by the Internet. Medical doctors were judged to be most credible when it comes to providing H1N1 information to the two target audiences. Health Canada, community health nurses and the Public Health Agency of Canada were also highly ranked in terms of credibility in providing this type of information.

Research results were used for the development of communications messages, products and dissemination activities, all of which were used to respond to the H1N1 outbreak and could also be used in future communication activities with these populations.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tps-gc/por-ef/public_health_agency_canada/2009/021-09/summary.pdf

NATIONAL DEFENCE

Canada First Defence Strategy and Military Procurement

This survey project was built on the research of previous studies (March and September 2009) to continue monitoring public opinion and to assess changes in awareness and support for the mandate of the Department of National Defence (DND).

Specific research objectives were to measure:

- attitudes towards defence spending on infrastructure and equipment; and
- perceptions of Canadians with respect to the economic benefits of these investments both locally and nationally.

A national telephone survey was conducted with 1,000 Canadians aged 18 and over between December 10 and December 15, 2009. The results have a margin of error of +/- 3.1 percent.

Results from the study showed that support for the Canadian Forces (CF) remains high at 82 percent. Male respondents and those over the age of 50 were more likely to strongly support the CF. Support for government investment in national defence was also high at 74 percent. Most (54 percent) are in favour of spending public funds on defence equipment while 71 percent agree that spending on defence infrastructure benefits local economies. Public perceptions on issues related to the adequacy of CF equipment, defence spending, and the benefits of DND spending on local economies have remained relatively static. In addition, public perceptions of DND and the CF's impact on the environment have not changed

significantly since March of last year, as just over four in ten (43 percent) continued to agree that the CF is taking action to minimize its impact on the environment.

Findings from this research project will be used to guide the development of communication products and messages, both at the national and regional level. Results will also enable DND to develop more targeted outreach activities. Moreover, the government was able to better understand the views of Canadians and take those views into consideration when formulating plans and policies concerning security and defence issues.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/national_defence/2010/062-09/summary.ppt

Views of the Canadian Forces

In February and March 2010, fieldwork was conducted on the annual *Views of the Canadian Forces* tracking study that examined the opinions, perceptions and views of Canadians regarding image and roles of the CF, the CF's efforts in Haiti, the mission in Afghanistan, and in Canada's North.

More specifically, research objectives were to assess the awareness, views and knowledge of Canadians with respect to the CF including its image, domestic and international roles, and defence strategy.

Both quantitative and qualitative methodologies were used to conduct the research project. The quantitative component involved a 15-minute telephone interview conducted between February 11 and February 25, 2010 with a randomly selected sample of 2,504 Canadians aged 18 and older. One questionnaire was fielded with generic questions regarding the CF to 1,503 people while the second asked 1,001 Canadians specific questions regarding Canada's mission in Afghanistan. The first survey had a margin of error of +/- 3.1 percent while the second had a margin of error of +/- 2.5 percent.

Qualitative research was also conducted between March 8 and March 15, 2010 in the form of focus groups. Two focus groups were carried out in each of the following cities: Kamloops, Prince Albert, Toronto, Montreal and Halifax. The focus groups included a range of ages between 18 and 64—one focus group in each city with 18 to 34 year olds, and the other with those aged 35 to 64. Each group contained a mix of men and women, a range of educational and income levels, as well as a range of attitudes towards the CF.

The quantitative study revealed that approximately nine in ten Canadians perceive the CF as a vital national institution (92 percent) and have a positive impression of the people who serve in the CF (87 percent). Half of Canadians (50 percent) feel that the Canadian military is under-funded. When asked about media awareness, nearly three in four Canadians (72 percent) recalled hearing, reading or seeing something about the CF, this proportion having increased by nine percentage points since 2009. As per the role of the CF, over half of Canadians (51 percent) believed that the top priority of the CF should be international. Virtually all (96 percent) of Canadians agreed that Canada's military should play a leading role in responding to natural disasters that occur in Canada; 94 percent of respondents were aware of the role that the CF played in response to the earthquake in Haiti; and the vast majority (92 percent) were proud that the CF played a role in responding to the earthquake. Although more than half of Canadians (56 percent) support Canada's activities in Afghanistan, 85 percent support Canada's plans to withdraw the majority of its military personnel from Afghanistan in July 2011.

Results from the focus-group study showed that participants were divided on the issue of whether or not the CF are adequately funded. They also felt that the primary role of the CF is seen to be defending Canada, with most activities seen as taking place overseas. Participants often drew parallels between how they perceive the CF and their role in the world and how they feel that Canada is perceived on the international stage. Generally speaking, participants did also see a

role, if a lesser one, on home territory. Several mentioned the presence of the military at the Vancouver Olympics and also the role that the CF has played in responding to natural disasters on Canadian soil. A few others mentioned that the CF should be deployed inside Canada to assist with addressing priority issues within Canada such as helping local police forces and local hospitals.

The Department of National Defence and the CF use the *Views of the Canadian Forces* tracking study to understand Canadians' views, knowledge and expectations of the Canadian Forces. More specifically, the findings from the 2010 study will be used by DND to monitor the public environment, inform decision-making, and develop communications strategies and messages to improve communications with Canadians.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/national_defence/2010/078-09/summary.pdf

NATURAL RESOURCES CANADA

2009 Alternative and Renewable Fuels Research Study

The study was conducted to better understand Canadians' opinions and perceptions with respect to alternative and renewable types of fuels. The study first included a qualitative component to explore views and opinions to assist in the development of the quantitative survey instrument for the survey that followed. More specifically, the objectives of the qualitative portion were to:

- assess Canadians' basic knowledge of renewable and alternative transportation fuels as well as current initiatives;
- determine awareness of and opinions about nine specific fuels, including both their weaknesses and strengths; and
- identify perceived drawbacks and priorities with respect to the development of alternative and renewable transportation fuels.

The overall objective of the quantitative research was to develop a deeper understanding of Canadians' attitudes towards alternative and renewable transportation fuels. Other specific objectives of the current study were to:

- measure possible motivations for switching to alternative fuels;
- determine how to design effective policies and programs with regard to renewable fuels; and
- establish communication strategies to promote acceptance and awareness of alternative and renewable fuels.

The qualitative research consisted of group discussions with three to five individuals via teleconference calls between March 9 and 19, 2009. The groups contained a mix of randomly selected participants who ranged in age (between 18 and 70), gender, and education level. Two focus groups were conducted in French: one focus with residents of Quebec and the other with a mix of participants from New Brunswick, Alberta and Ontario. Three focus groups were conducted in English, one in each of the following regions: Atlantic Canada, Ontario and the Western Provinces.

The quantitative research was based on a survey of 508 Canadians 18 and over by telephone from April 18 to May 15, 2009. Respondents were selected at random from a list of telephone numbers in each province through probability-based sampling procedures. The calculated margin of error was +/- 2.5 percent, 19 times out of 20. The results were weighted to represent the general population.

While hydrogen, electricity, biodiesel and ethanol were cited by participants in the qualitative phase of this study as the most common alternatives to transportation fuels, knowledge of how they are produced is very limited. The concept of recycling products such as cooking oils or landfill waste to produce energy was well received among participants. Generally speaking, these fuels were seen as alternatives or replacements for conventional diesel and gasoline.

The quantitative research showed that 80 percent of respondents were aware of renewable or alternative sources of fuel. Awareness tended to be highest among residents of Ontario and Western Canada. It was also higher among men and in households with higher incomes. The primary advantages of alternative and renewable fuels identified by Canadians were that they are better for the environment, and that they result in fewer greenhouse gases, pollution and smog. On the other hand, the greatest disadvantages were seen as the cost compared to traditional fuels and the lack of availability.

The study showed that one in eight (13 percent) Canadians have purchased an alternative transportation fuel at least once; ethanol ranked the highest, followed distantly by biodiesel and propane. Furthermore, three-fifths (62 percent) of Canadians have heard of the "food versus fuel" debate, ranging from 52 percent in Atlantic Canada to 69 percent in British Columbia. Men, employed Canadians, and households with higher income showed increased awareness of the "food versus fuel" debate.

The results of this study provided an understanding of the opinions and perceptions of Canadians with respect to alternative and renewable fuels. Natural Resources Canada has developed an outreach strategy based on the research findings that will address gaps and increase awareness to help Canadians make sound and educated choices with respect to alternative and renewable fuels. This information will further guide the development of communication products that will increase acceptance and further educate Canadians on the availability and benefits to the use of alternative and renewable fuels.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/natural_resources/2009/082-08/summary.pdf

PARKS CANADA

2009 National Survey of Canadians

Parks Canada conducted a broad-focused national survey of the Canadian general public in response to the changing characteristics of the Canadian population, which is becoming older, more urban and more ethnically diverse. The research sought to better understand Canadians' views and attitudes towards national parks and national historic sites, as well as their understanding of the Parks Canada's mandate regarding these sites. Key issues addressed were:

- public awareness, knowledge and understanding of Parks Canada;
- public use of national protected heritage areas;
- Canadians' attitudes toward Canadian history and cultural heritage as well as the natural environment;
- public support for, and personal commitment to, cultural heritage, the natural environment and Parks Canada's work in these areas;
- Canadians' perceptions of Parks Canada's success reaching its objectives.

Telephone interviews were conducted from March 2 to March 30, 2009 with 3,779 Canadians over the age of 18. The margin of error for a sample of this size is +/- 1.6 percent, 19 times out of 20. The average length for the survey



administered was 23 minutes. A base sample was designed to represent 2,500 Canadians aged 18 years and older. The research also included an oversample of 1,250 Canadians living in the four largest census metropolitan areas (CMAs): Montreal, Toronto, Calgary and Vancouver. This oversample had a particular focus on immigrants to Canada (400) while the remaining 850 respondents were obtained from the general population of these CMAs.

Results from the study showed that awareness of Parks Canada increased by 13 percent since 2007, from 66 percent to 79 percent. More than 60 percent of Canadians who were aware of the agency indicated that they believed that its role is to operate and maintain parks. One quarter (25 percent) said that Parks Canada exists to protect parks and the natural environment. Approximately 75 percent of Canadians believe that the government has the most responsibility for protection of natural and historic areas.

While most Canadians (57 percent) recently visited a national park, Western Canadians were the most likely to have done so. The national parks most often visited in the recent past include Banff (20 percent), Jasper (7 percent), Riding Mountain (3 percent), Pacific Rim (2 percent), La Mauricie (2 percent) and Waterton Lakes (2 percent). Fewer Canadians have visited a national historic site (25 percent) recently, while many more (40 percent) have visited some other





historic site. The Parks Canada-administered national historic site named most often was the Fortress of Louisbourg (3 percent). Respondents who had not visited a national park or national historic site recently indicated that distance, cost and lack of time were among the main reasons why.

The newest additions to Canada's network of protected places are the three national marine conservation areas (Fathom Five, Lake Superior and Saguenay-St. Lawrence). Almost one-third (31 percent) of Canadians are aware of these marine conservation areas; however, two percent of Canadians have yet had the opportunity to visit them.

In regards to Parks Canada's communication products, approximately one-half of respondents had seen Parks Canada advertised on television, while communications through newspapers and magazines were reported seen less frequently. Respondents indicated they would like to learn more about available sites to visit: their location, educational information, as well as their cultural and historical significance.

The results of the study allowed the update of information collected in previous waves of research and establish new benchmarks in priority areas. Parks Canada was able to develop more focused communication strategies that allowed Canadians to better understand the department's mandate and its purpose with regard to national parks and protected historical sites. Results were also used for corporate

reporting and program investment, and to help Canadians connect their hearts and minds with their national parks, national historic sites and national marine conservation areas.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/parks_canada/2009/055-08-e/summary.pdf

PUBLIC SAFETY CANADA

Emergency Preparedness Week 2009 Evaluation

In May 2009, Public Safety Canada undertook the *Emergency Preparedness Week 2009 Evaluation*. Emergency Preparedness Week (EP Week) campaign activities are delivered via a collaborative effort by all levels of government (federal, provincial, territorial and municipal), non-governmental organizations (NGOs) and private sector businesses, Public Safety Canada being the lead for coordinating national preparedness activities.

Survey results enable Public Safety Canada to compile the annual performance indicators showing the percentage of Canadians with emergency kits and plans.

The purpose of this study was to obtain quantitative evaluation data for EP Week by measuring:

- Canadians' recall of EP Week;
- the extent to which EP Week activities caused Canadians to take action to prepare for an emergency;
- the level of personal EP indicators such as the proportion of the population preparing family emergency kits and plans; and
- the proportion of Canadians who are aware of emergencies likely to occur where they live.



A nationally representative telephone survey was conducted between May 14 and May 25, 2009, shortly after EP Week ended. A randomly selected sample of 1001 Canadians, 18 years of age or older, were interviewed by telephone. A sample of this size provides a margin of error of +/- 3.1 percent, 19 times out of 20.

The study found that one in three Canadians had seen or heard about the EP Week campaign. The campaign was seen as more personally relevant than in the past. Television continued to be the most common source of information, followed by newspapers and radio. A growing majority of Canadians who were aware of EP Week stated that it made them at least think about preparing an emergency kit.

Results also showed that of those aware of EP Week, approximately one in five respondents, have taken part in personal emergency preparedness activities. Stocking up on emergency supplies was the most commonly reported method of being prepared. The study also found that Canadians were more likely to turn to municipal or provincial government for information rather than the federal government.

The department shared the findings within the Government of Canada and with not-for-profit, private sector partners, as well as provincial and territorial emergency measures organizations to assess campaign effectiveness and to help inform and support future activities. Emergency-preparedness metrics have been collected since 2005, providing the department and its partners, invaluable insight into the state of preparedness in Canada. Furthermore, the results are reviewed to determine if emergency-preparedness outreach efforts are impacting related knowledge, attitude or behaviours. Based on changes observed among these indicators, campaign messaging and communications activities are adjusted each year.

http://epe.lac-bac.gc.ca/100/200/301/pwgsc-tpsgc/por-ef/public_safety_canada/2009/006-09/summary.pdf

FOR MORE INFORMATION

This report provides an overview of public opinion research activities in the Government of Canada during the fiscal year 2009–2010.

If you have any comments or questions, please contact:

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APPENDICES

APPENDIX I: LISTING *of* DEPARTMENTS ENGAGED *in* PUBLIC OPINION RESEARCH *in* 2009–2010

DEPARTMENT/AGENCY	NUMBER OF PROJECTS	CONTRACT VALUE ¹
Health Canada ²	26	\$1,473,229
Agriculture and Agri-Food Canada	8	\$935,083
Human Resources and Skills Development Canada	10	\$825,157
Canada Revenue Agency ³	15	\$716,396
Department of Finance Canada	11	\$516,456
National Defence	7	\$500,073
Royal Canadian Mounted Police	7	\$452,086
Citizenship and Immigration Canada	11	\$450,227
Natural Resources Canada	4	\$354,574
Privy Council Office	4	\$275,289
Canadian Food Inspection Agency	8	\$265,168
Canadian Transportation Agency	1	\$183,251
Parks Canada	5	\$177,964
Canadian Heritage	4	\$172,894
Veterans Affairs Canada	3	\$151,025
Indian and Northern Affairs Canada	1	\$144,713
Department of Justice Canada	1	\$142,731
Passport Canada	1	\$138,020
Public Service Commission	1	\$99,971
Office of the Privacy Commissioner of Canada	2	\$98,943
Office of the Superintendent of Financial Institutions	3	\$93,791
Infrastructure Canada	2	\$56,485
Canada Border Services Agency	1	\$53,781
Canada Economic Development for Quebec Regions	1	\$46,263

(CONTINUED ON PAGE 47)

APPENDIX I: LISTING of DEPARTMENTS ENGAGED in PUBLIC OPINION RESEARCH in 2009–2010
(CONTINUED FROM PAGE 46)

DEPARTMENT/AGENCY	NUMBER OF PROJECTS	CONTRACT VALUE
Environment Canada	1	\$16,724
Library and Archives Canada	1	\$15,643
Public Safety Canada	1	\$15,167
Atlantic Canada Opportunities Agency	1	\$3,616
Foreign Affairs and International Trade Canada	6	-\$9,659 ⁴
Transport Canada	1	-\$59,267 ⁵
GRAND TOTAL:	148	\$8,305,795

¹ Contract values represent all contractual transactions (including amendments to increase, cancel or reduce the value of the contract), issued between April 1, 2009 and March 31, 2010.

² Includes contracts issued for the Public Health Agency of Canada. Contract value includes projects undertaken under task authorization contracts in the 2009–2010 fiscal year.

³ Includes contracts issued for the Office of the Taxpayers' Ombudsman.

⁴ In 2009–2010, a contract was amended to cancel the value of an existing project originally contracted during the 2008–2009 fiscal year. The result was a net decrease.

⁵ In 2009–2010, a contract was amended to reduce the contract value of an existing project originally contracted during the 2007–2008 fiscal year. The result was a net decrease. No POR was contracted in 2009–2010 for this department.

APPENDIX II: LISTING of CONTRACTORS ENGAGED in PUBLIC OPINION RESEARCH in 2009–2010

SUPPLIER	NUMBER OF PROJECTS	CONTRACT VALUE
Ipsos-Reid Corporation	23	\$1,744,471
Harris/Decima ¹	23	\$1,623,743
EKOS Research Associates Inc.	21	\$1,174,734
TNS Canadian Facts Inc.	11	\$781,222
Corporate Research Associates Inc.	13	\$716,448
Environics Research Group	10	\$645,914
Phoenix Strategic Perspectives Inc.	14	\$626,170
The Strategic Counsel	9	\$355,390
Sage Research Corporation	8	\$277,883
Patterson, Langlois Consultants	3	\$110,219
Western Opinion Research Inc.	2	\$70,757
Angus Reid Strategies	2	\$43,048
Phase 5 Consulting Group Inc.	1	\$24,977
TalentMap division of Napa Networks Inc.	1	\$24,623
Pollara Inc.	1	\$23,625
Bristol Groups Inc./Bristol Omnifacts Research	1	\$20,453
IE Market Research Corp.	1	\$19,950
Macadamian Technologies Inc.	1	\$18,540
R.A. Malatest & Associates Ltd.	1	\$14,963
Redfern Research	1	\$6,090
Léger Marketing	1	\$-17,425 ²
GRAND TOTAL:	148	\$8,305,795

¹ Includes contracts awarded under Decima Research.

² In 2009–2010, a contract was amended to cancel the value of an existing project originally contracted during the 2008–2009 fiscal year. The result was a net decrease.

APPENDIX III: LOCATIONS *and* TOTAL NUMBERS of FOCUS GROUPS STUDIES CONDUCTED *for the* GOVERNMENT of CANADA in 2009–2010

The information on focus groups is from studies undertaken in 2009–2010 for which final POR reports were available at the time of publication of this report.

LOCATIONS OF FOCUS GROUPS	NUMBER OF FOCUS GROUPS ¹	LOCATIONS OF FOCUS GROUPS	NUMBER OF FOCUS GROUPS
Bathurst, N.B.	1	Oakville, Ont.	2
Brampton, Ont.	1	Oshawa, Ont.	1
Brandon, Man.	1	Ottawa, Ont.	5
Calgary, Alta.	7	Prince Albert, Sask.	1
Chilliwack, B.C.	1	Quebec City, Que.	7
Coquitlam, B.C.	2	Rankin Inlet, Nun.	2
Drummondville, Que.	1	Red Deer, Alta.	1
Edmonton, Alta.	1	Regina, Sask.	1
Eskasoni, N.S.	1	Richmond, B.C.	1
Gatineau, Que.	1	Saint John, N.B.	1
Guelph, Ont.	1	Saskatoon, Sask.	7
Halifax, N.S.	15	Sherbrooke, Que.	1
Inuvik, N.W.T.	1	Sioux Lookout, Ont.	1
Iqaluit, Nun.	3	St. John's, N.L.	6
Jonquière, Que.	1	Toronto, Ont.	30
Kamloops, B.C.	1	Trois-Rivières, Que.	4
Kelowna, B.C.	1	Vancouver, B.C.	16
Kitchener, Ont.	4	Waterloo, Ont.	1
Lethbridge, Alta.	1	Wendake, Que.	1
London, Ont.	2	Whitehorse, Y.T.	2
Mississauga, Ont.	4	Windsor, Ont.	2
Moncton, N.B.	2	Winnipeg, Man.	6
Montreal, Que.	28	Yellowknife, N.W.T.	1
North Vancouver, B.C.	4		

¹ The numbers correspond to the number of times a focus group study was held in each location.

APPENDIX IV: STANDING OFFERS *for* PUBLIC OPINION RESEARCH *in* 2009–2010

The Communication Procurement Directorate of Public Works and Government Services Canada, in collaboration with the Public Opinion Research Directorate, established a series of contracting tools for POR services through a competitive process. These included standing offers with the following suppliers, which expired on March 31, 2010:

SERIES A—QUALITATIVE RESEARCH

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

SERIES B—QUANTITATIVE RESEARCH

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

SERIES C—QUALITATIVE AND/OR QUANTITATIVE RESEARCH

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

APPENDIX V: NEW STANDING OFFERS *for* PUBLIC OPINION RESEARCH, EFFECTIVE APRIL 1, 2010

The new standing offers for public opinion research were issued on April 1, 2010 and made available for use by departments for research projects with a contract value of up to \$200,000 (including GST/HST). These standing offers were established competitively.

STANDING OFFER HOLDERS ¹	FIELDWORK & DATA TABULATION		ONLINE PRE-TESTING OF ADVERTIS.	TARGET POPULATIONS									
	TELEPHONE	ONLINE		SERIES A: QUALITATIVE			SERIES B: QUANTITATIVE			SERIES C: QUAL./QUANT.			
				GENERAL	ABORIGINAL	ETHNO	GENERAL	ABORIGINAL	ETHNO	GENERAL	ABORIGINAL	ETHNO	
Ascentum		•		•			•				•		
Bristol Group Inc.	•			•			•				•		
Campaign Research	•												
COMPAS Inc.				•		•							
Corbin Partners Inc.				•									
Corporate Research Associates Inc.	•	•	•	•	•	•	•			•	•		•
CROP INC.	•												
DataPath Systems							•						
Ekos Research Associates Inc.	•	•		•	•	•	•	•		•	•		
Environics Research Group	•	•		•	•	•	•	•	•	•	•	•	•
Gadd Research Inc.			•										
Genesis Public Opinion Research Inc.				•			•			•			
Gregg, Kelly, Sullivan & Woolstencroft: The Strategic Counsel				•		•	•	•	•	•			•
Harris/Decima Inc.	•	•	•	•	•		•	•		•	•		
Holinshed Research Group Inc.	•	•					•						
HRSG				•									
Innovative Research Group Inc.	•									•			
Insightrix Research Inc.	•	•					•						
IPSOS-REID CORPORATION	•	•	•	•	•	•	•	•	•	•	•	•	•
Jolicoeur & Associés	•												
Léger Marketing		•	•	•		•	•		•	•			•
MacPhie & Company Inc.				•									

(CONTINUED ON PAGE 52)

APPENDIX V: NEW STANDING OFFERS *for* PUBLIC OPINION RESEARCH, EFFECTIVE APRIL 1, 2010
(CONTINUED FROM PAGE 51)

STANDING OFFER HOLDERS	FIELDWORK & DATA TABULATION		ONLINE PRE-TESTING OF ADVERTIS.	TARGET POPULATIONS								
	TELEPHONE	ONLINE		SERIES A: QUALITATIVE			SERIES B: QUANTITATIVE			SERIES C: QUAL./QUANT.		
				GENERAL	ABORIGINAL	ETHNO	GENERAL	ABORIGINAL	ETHNO	GENERAL	ABORIGINAL	ETHNO
Nanos Research Corporation	•	•		•			•			•		
NRG Research Group	•			•	•	•						
Opinion Search Inc.	•	•										
Patterson, Langlois Consultants				•								
Phase 5			•	•			•			•		
Phoenix SPI	•	•		•	•	•	•	•		•	•	
Pollara		•		•			•			•		
Praxicus Public Strategies Inc.				•			•			•		
Probe Research Inc.				•	•							
Quorus Consulting Group Inc.				•			•			•		
Research Strategy Group Inc.				•	•	•	•			•		
Sage Research Corporation				•		•	•			•		
Saine Marketing Inc.		•					•					
SOM Inc.	•	•					•					
Sylvain Laroche, consultant, Inc.				•			•			•		
Synovate Ltd.			•				•					
The Logit Group Incorporated	•	•										
TNS CANADIAN FACTS INC.	•	•	•	•		•	•		•	•		•
torontoinsights.com	•	•										
Veraxis Research & Communications Inc.				•			•			•		
Vision Critical Communications Inc.		•	•	•		•	•		•	•		•
Walker Consulting Group				•			•	•		•		

¹ The company names listed in this appendix are their operating names as they appear in the Government of Canada standing offers.