

CRIC

CANADIAN RESEARCH
INSIGHTS COUNCIL

The Value of Research

April 2022

For more information contact:
john.tabone@canadianresearchinsightscouncil.ca

The Canadian Research Insights Council is the standards setting body for Canada's research, analytics, and insights industry. CRIC members devote a significant amount of time and effort to protecting the good relationship that exists between researchers and Canadians, including adhering to world-leading professional standards of ethical practice and taking comprehensive steps to respect a person's right to privacy. CRIC members register their research with the [CRIC Research Verification Service](#) and abide by the [CRIC Pledge to Canadians](#).

In an effort to better understand the views of Canadians on research, CRIC conducted the **Value of Research Survey** with adult Canadians and business and policy decision-makers from across the country. As this report demonstrates, the results are encouraging for the research, analytics, and insights industry. The surveys show that Canadians and decision-makers place a high value on the importance of research, believe that public opinion polls are accurate, and that they play an important role in democracy by giving voice and influence to Canadians.

Also encouraging for CRIC members, the surveys found that most Canadians and business executives believe that survey research companies working in the public realm should belong to a standards organization, and that knowing that a firm follows strict rules and standards was a significant consideration for participating in survey research.

CRIC wishes to thank the following members of the CRIC Industry Survey Working Group for their joint efforts in developing the surveys: Anastasia Arabia (Trend Research); Rob Berger (Schlesinger Group); Frank Graves (Ekos); Jean-Marc Léger (Léger); and Diana Lucaci (True Impact). We also want to extend a particular thanks to Léger and EKOS Research for their contributions. Ekos Research conducted the fieldwork and provided sample for the survey of Canadians. Léger conducted the fieldwork and supplied sample for the survey of Canadian Business Executives and Lisa Covens from Léger prepared this report.

 Two online surveys.

 1. 303 business decision and/or policy makers and influencers from across the country, using Leger's panel of more than 40K business executives, decision makers, and influencers (Leger).
2. 1004 adult Canadians from across the country (Ekos).

 1. Completed between July 28 and August 04, 2021 (Leger).
2. Completed between July 21 and August 04, 2021 (Ekos).



 1. The Leger B2B survey was conducted among 303 business leaders across Canada. Business panels are always non-probabilistic and margin of error cannot be associated.
2. The Ekos Survey: A probability sample of 1004 respondents has a margin of error of $\pm 3.1\%$, 19 times out of 20. All the data have been statistically weighted by age, gender, and region to ensure the sample's composition reflects that of the actual population of Canada according to Census data.

Where applicable, the two datasets were compared to one another. Throughout this report, UP and DOWN arrows have been used to highlight any significant differences between the business decision and/or policy makers and influencers (n=303) and members of the general public (n=1004).



About Leger's Online Panel

Leger's online panel has over 400,000 members nationally and has a retention rate of 90%. Stringent quality assurance measures allow Leger to achieve the high-quality standards set by the company. As a result, its methods of data collection and storage outperform the norms set by WAPOR (The World Association for Public Opinion Research). These measures are applied at every stage of the project, from data collection to processing, through to analysis. Business decision makers (40,000 panelists) who are part of the LEO panel were targeted for this study. Both the double opt-in selection process (a model to detect fraud), along with the renewal of 25% of the panel each year, helps ensure overall respondent quality. To ensure a higher response rate (and more easily reach people on their mobile devices), Leger has also developed a high-performance Apple and Android application.

About Ekos' Probit Panel

Probit is a research panel that has been designed by EKOS to provide statistically representative data. The panel offers complete coverage of the Canadian population (i.e., Internet, phone, cell phone), random recruitment (in other words, participants are recruited randomly, they do not opt themselves into the panel), and equal probability sampling. All respondents to the panel are recruited by telephone using random digit dialing and are confirmed by live interviewers. The distribution of the recruitment process for the panel mirrors the actual population in Canada (as defined by Statistics Canada). As such, the panel can be considered representative of the general public (survey results from the online panel support confidence intervals and error testing). The overall panel size is roughly 100,000 Canadian households. Random stratified samples are drawn from the panel database for individual research assignments.

- More than eight-in-ten Canadians believe polling is accurate (83% among members of the general public / 86% among business executives).
- Most Canadians and Canadian business executives believe public opinion polls provide a picture of where the public stands on critical issues of the day (66% public / 65% business), and most pay attention to polls reported in the media (80% public / 78% business).
- Given the important role of public opinion research, it's not surprising that most believe polling companies working in the public realm should belong to a standards organization – especially members of the general public (72% public and 66% business executives). Familiarity with the Canadian Research Insights Council (CRIC), Canada's standard setting body for the research, analytics, and insights industry, is low (26% public and 51% business) supporting a need for increasing awareness.
- A large majority believe public opinion polls are a moderately to extremely useful (89% public / 90% business) way the federal government can gather the views of Canadians. Among the options presented, only national elections and referendums rated higher than surveys, and these options involve substantial costs.
- Half of the Canadians surveyed – and nearly two-thirds of the business executives surveyed – believe that research helps to contribute to the understanding of elections and the democratic processes (49% public / 59% business). More than half also believe that research gives decision makers in business and the government the information they need to make better decisions (58% public / 61% business). The balance of respondents who answered this question were either neutral or unsure. Only a minority disagreed with either statement.
- The majority of Canadians (80%) and business executives (81%) have a moderate to high level of trust that polling companies will keep their data confidential.
- About 50% believe polling contributes *positively* to democracy (48% public / 52% business). The balance of respondents who answered this question were either neutral or unsure (37% Canadians / 36% business executives). Relatively few respondents believe that polling had a *negative impact* on democracy.
- Knowing that a research agency follows strict standards encourages a large majority of Canadians (78%) and business executives (70%) alike to participate in public opinion research.

CRIC

Comparing Canadian Businesses
and the General Public

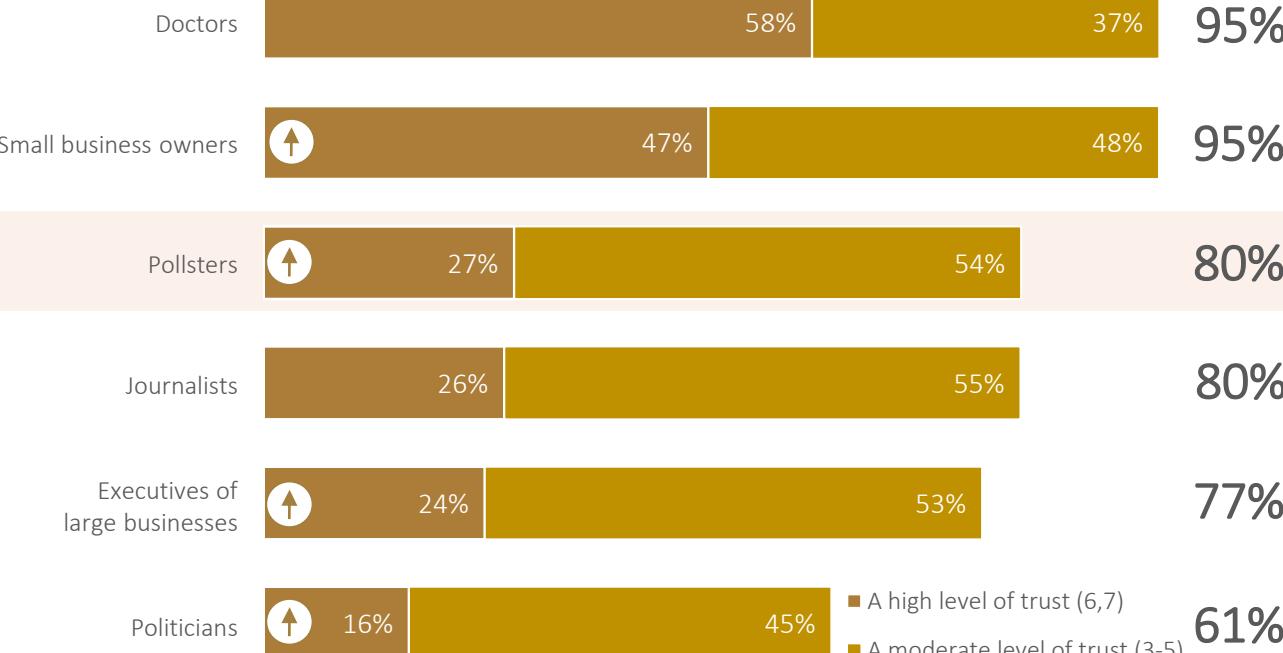
Pollsters rank third among businesses and fourth among Canadians on trust.

THE VALUE OF RESEARCH
2022

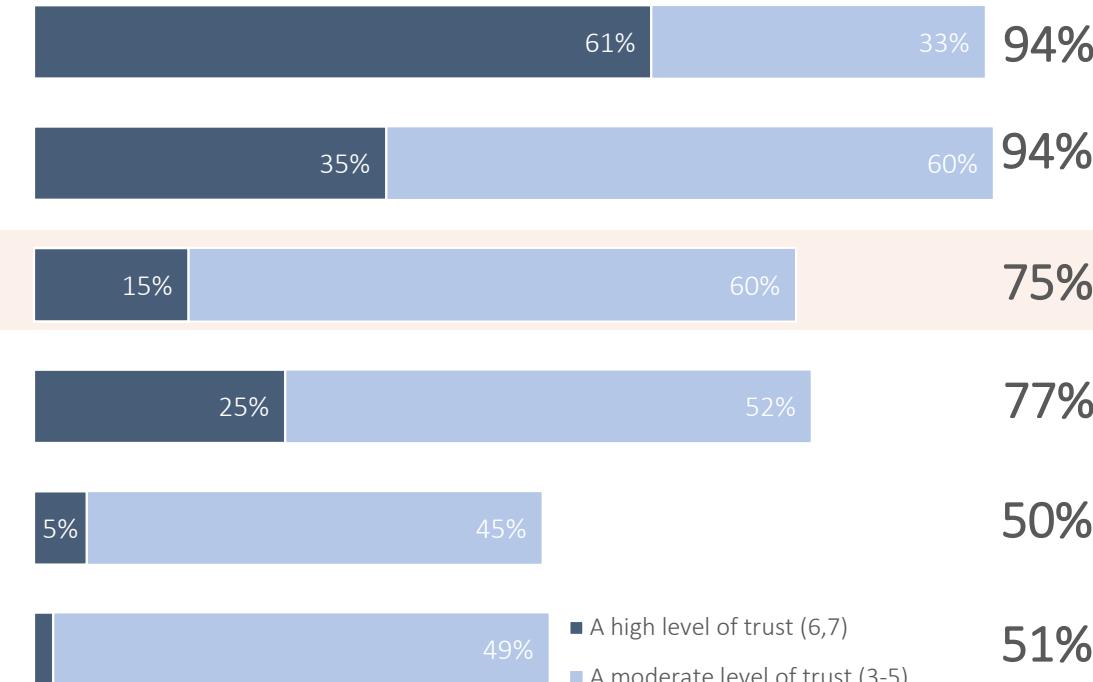
CRIC
6

A large majority of Canadians and business executives have a moderate to high level of trust in pollsters (80% business executives / 75% Canadians). Nearly twice as many business executives have a high level of trust in pollsters (27% vs. 15% of the general public). Among Canadians, trust in pollsters is higher among Quebecers (27%), older respondents (23% among those 65+ vs. 13% among younger respondents, 18-64), as well as among those with a high degree of trust in the industry already (27%). For many business executives, trust is higher among Quebecers, too (40%), as well as among men (33% vs. 19% among women) and those with a high degree of trust in the industry already (43%).

Businesses



Canadians



0001 How much trust do you have in each of the following?

(1=very low level, 3-5=a moderate level, 7=very high level)

† sum of individual percentages might not match totals due to rounding
Base: All business decision and/or policy makers and influencers surveyed (n=303) / All Canadians (n=1004).



Significantly lower or higher

Opinion polls are a top way for the Federal Government to gather the views of Canadians.

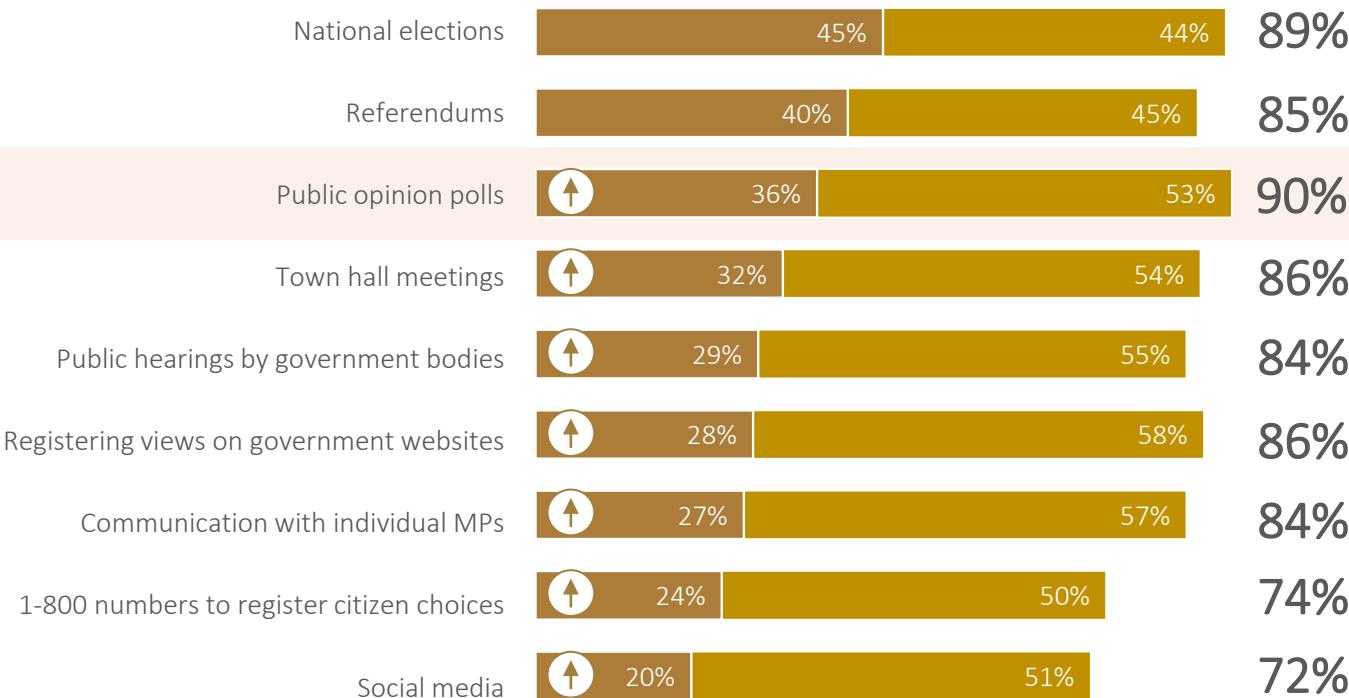
THE VALUE OF RESEARCH
2022



7

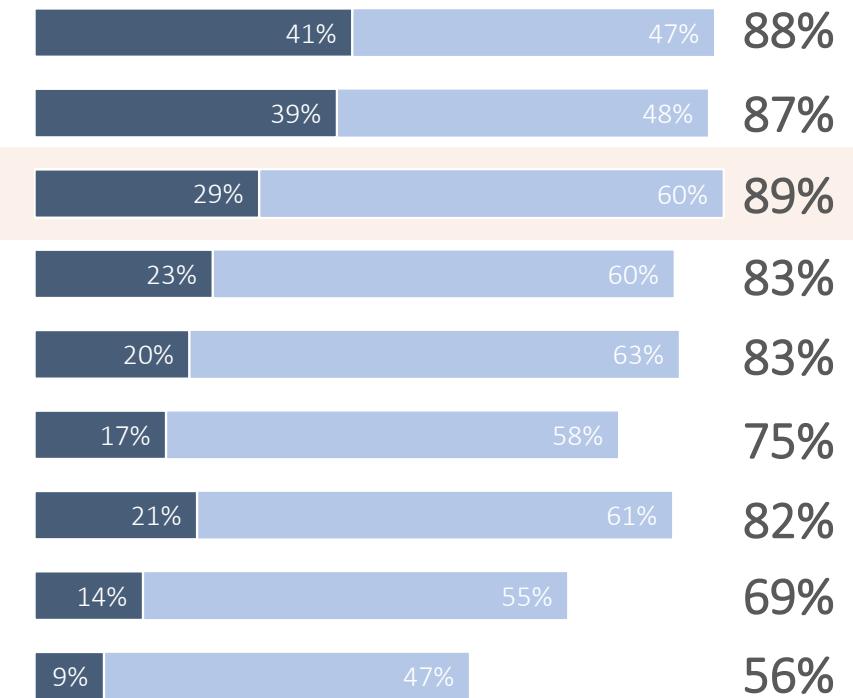
When presented with a list of options, the vast majority of Canadians and Canadian business executives believe surveys (i.e., public opinion polls) are moderately to extremely useful (90% business executives / 89% Canadians). When top-2-box scores are examined in isolation, public opinion polls rank third. Only national elections and referendums rated higher than surveys, and these options involve substantial costs. More specifically, among Canadians with a high degree of trust in the industry already, public opinion polls, at 46%, rank second behind national elections and become virtually tied with referendums.

Businesses



■ Extremely useful (6 or 7 on a 7-point scale) ■ Moderately useful (3-5 on a 7-point scale)

Canadians



■ Extremely useful (6 or 7 on a 7-point scale) ■ Moderately useful (3-5 on a 7-point scale)

0002 There are a number of ways the federal government can gather the views of Canadians. How useful do you think each of the following ways are?

(1-not at all useful, 3-5-moderately useful, 7-extremely useful)

Base: All business decision and/or policy makers and influencers surveyed (n=303) / All Canadians (n=1004).



Significantly lower or higher

There is a very high degree of trust for research. When presented with three terms, *survey research* garners the most trust.

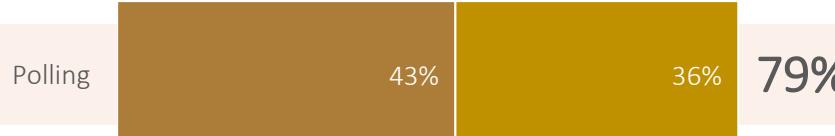
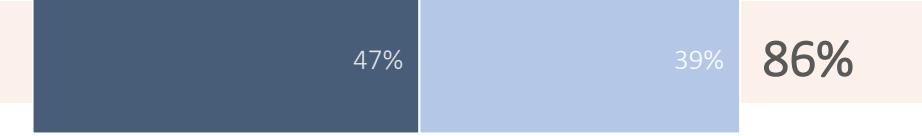
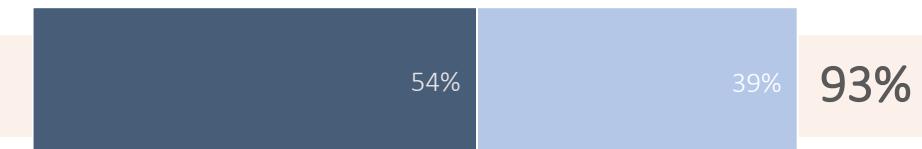
THE VALUE OF RESEARCH
2022

A large majority of respondents from both audiences have at least a moderate to high degree of trust for survey research (93% public and 91% business). Trust scores differ based on the term use. *Polling* has the lowest degree of trust among business executives and Canadians, suggesting that using the term *survey research* will help improve trust among business executives and Canadians.

Businesses



Canadians



■ High degree of trust (4,5) ■ Moderate degree of trust (3)

■ High degree of trust (4,5) ■ Moderate degree of trust (3)

0003 All things considered, how much trust do you have in . . . ?

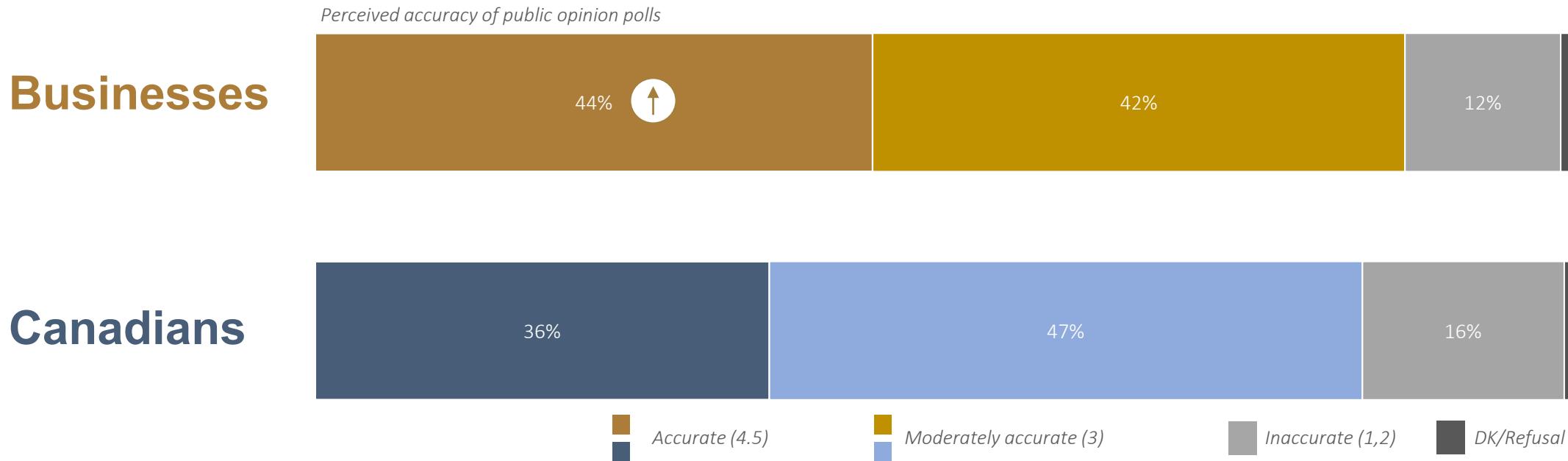
(1-none, 3-moderate degree of trust, 5-very high degree of trust)

Bases: A third of the business decision and/or policy makers and influencers surveyed / Canadians surveyed.

Many Businesses and Canadians believe that public opinion polls are accurate.

THE VALUE OF RESEARCH
2022

Eight-in-ten Canadians believe that public opinion polling is at least moderately accurate (86% among businesses executives / 83% among Canadians). Four-in-ten ten gave public opinion polls top marks, though.



0004 In general, how accurate do you believe public opinion polls are?

(1-not at all accurate, 3-to a moderate extent, 5-extremely accurate)

Base: All business decision and/or policy makers and influencers surveyed (n=303) / All Canadians (n=1004).



Significantly lower or higher

Public opinion polls can paint a picture of where Canadians stand on critical issues.

THE VALUE OF RESEARCH
2022

Public opinion polling not only helps people understand public sentiment on current issues, it also helps with policy and decision making on many levels, and can contribute to a better understanding of elections and the democratic process. Most respondents believe that polling companies working in the public realm should belong to a standards organization, especially members of the general public (72% vs. 66% among business executives).

Businesses

Polling companies working in the public realm should belong to a standards organization



Public opinion polls provide a picture of where the public stands on critical issues of the day



Public opinion polls give decision makers in business and government the information they need to make better decisions



Public opinion polls contribute to the understanding of elections and democratic processes



Public opinion polls influence voting behaviour in ways that are unhealthy



■ Agrees (4,5) ■ Neither/Don't Know ■ Disagree (1,2)

Canadians

72% 23% 5%



58% 23% 19%



34% 36% 29%



■ Agrees (4,5) ■ Neither/Don't Know ■ Disagrees (1,2)

0005 Please rate the extent to which you agree or disagree with the following statements?

(1-strongly disagree, 3- neither, 5-strongly agree) † totals might not add to 100% due to rounding

Base: All business decision and/or policy makers and influencers surveyed (n=303) / All Canadians (n=1004).



Significantly lower or higher

Canadians are more than three times more likely to believe public opinion polls have a *positive* impact on democracy.

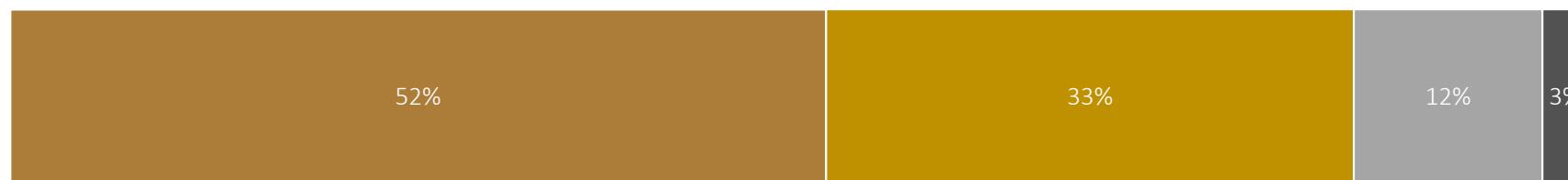
THE VALUE OF RESEARCH
2022

CRIC
11

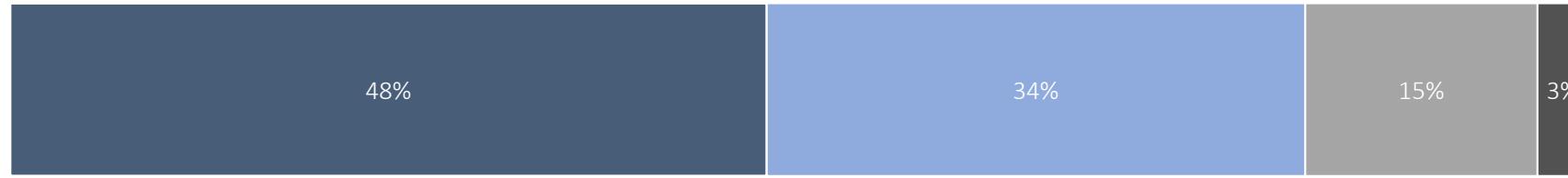
Canadians are three times more likely to believe that public opinion polls have a positive impact than a negative one on democracy. The number is even higher among business executives, who are four times more likely to believe polls have a positive impact. Scores are higher among business executives with a high degree of trust in the industry already (74% vs. just 8% among those with a low degree of trust), as well as among those who believe public opinion polls are accurate during elections (66% vs. half that [32%] among those who believe otherwise). The balance of respondents who answered this question were either neutral or unsure (36% among business executives / 37% among Canadians). Relatively few respondents believed that polling had a negative impact on democracy.

Those who believe public opinion polling has a positive/negative impact on democracy (4 or 5 on a 5-point scale)

Businesses



Canadians



Positive (4,5) Neither (3) Negative (1,2) DK/Refusal

0006 All things considered, do you believe public opinion polling has a positive or a negative impact on democracy?
(1=very negative, 3=neither positive nor negative, 5=very positive)

Base: All business decision and/or policy makers and influencers surveyed (n=303) / All Canadians (n=1004).

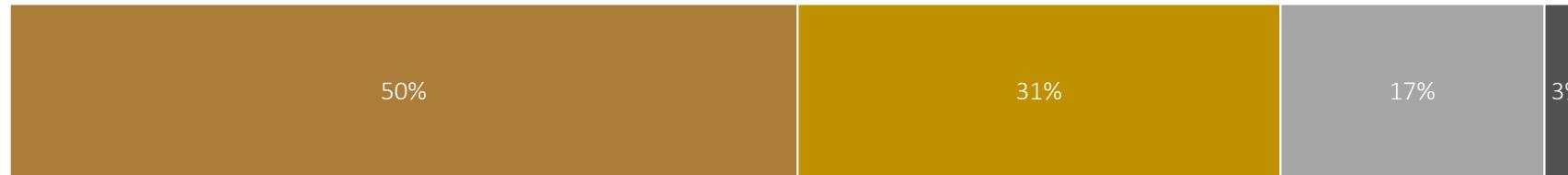
The majority of respondents trust that polling companies keep data confidential.

THE VALUE OF RESEARCH
2022

A large majority of Canadians and business executives have a moderate to high level of trust that polling companies keep their data confidential (81% of business executives and 80% of Canadians). Trust is higher among younger business executives (18-34: 63%), men (55%), and those with a high degree of trust in the industry already (71% vs. just 11% among those who do not). Among Canadians, trust is higher among Quebecers (60%), seniors (61%), and those with a high degree of trust in the polling industry already (67% vs. just 17% among those who do not).

Trust in polling companies to keep data confidential and anonymous (4 or 5 on a 5-point scale)

Businesses



Canadians



High degree of trust (4,5) Moderate trust (3) Low/no trust (1,2) DK/Refusal

0007 To what extent do you trust polling companies to keep your data confidential and anonymous?

(1-not at all, 3-to a moderate extent, 5-to a great extent)

Base: All business decision and/or policy makers and influencers surveyed (n=303) / All Canadians (n=1004).

Following strict standards encourages greater participation in research.

THE VALUE OF RESEARCH
2022



13

A large proportion of Canadians and business executives indicated that all the items listed in the question below would encourage them to participate **in a research project**. The option that rated highest was the knowledge that the firm administering the survey was guided by strict standards. Unsurprisingly, each of these percentages is statistically higher among those with a high degree of trust in the industry already, those who believe public opinion polls have a *positive* impact on democracy, as well as those who pay attention to public opinion polls in the media.

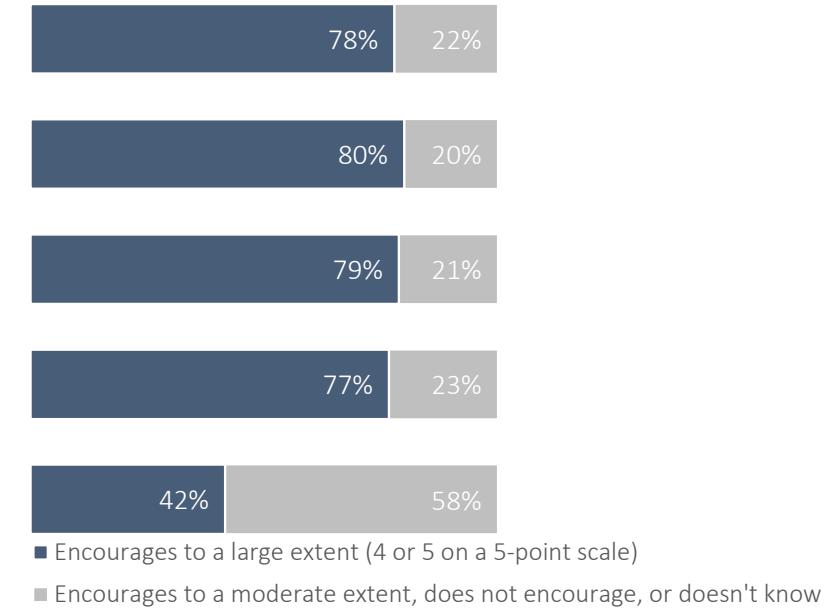
Businesses



■ Encourages to a large extent (4 or 5 on a 5-point scale)

■ Encourages to a moderate extent, does not encourage, or doesn't know

Canadians



■ Encourages to a large extent (4 or 5 on a 5-point scale)

■ Encourages to a moderate extent, does not encourage, or doesn't know

0008 To what extent would each of the following encourage you to participate in public opinion polls?

(1-not at all, 3-to a moderate extent, 5-to a great extent)

Base: All business decision and/or policy makers and influencers surveyed (n=303) / All Canadians (n=1004).



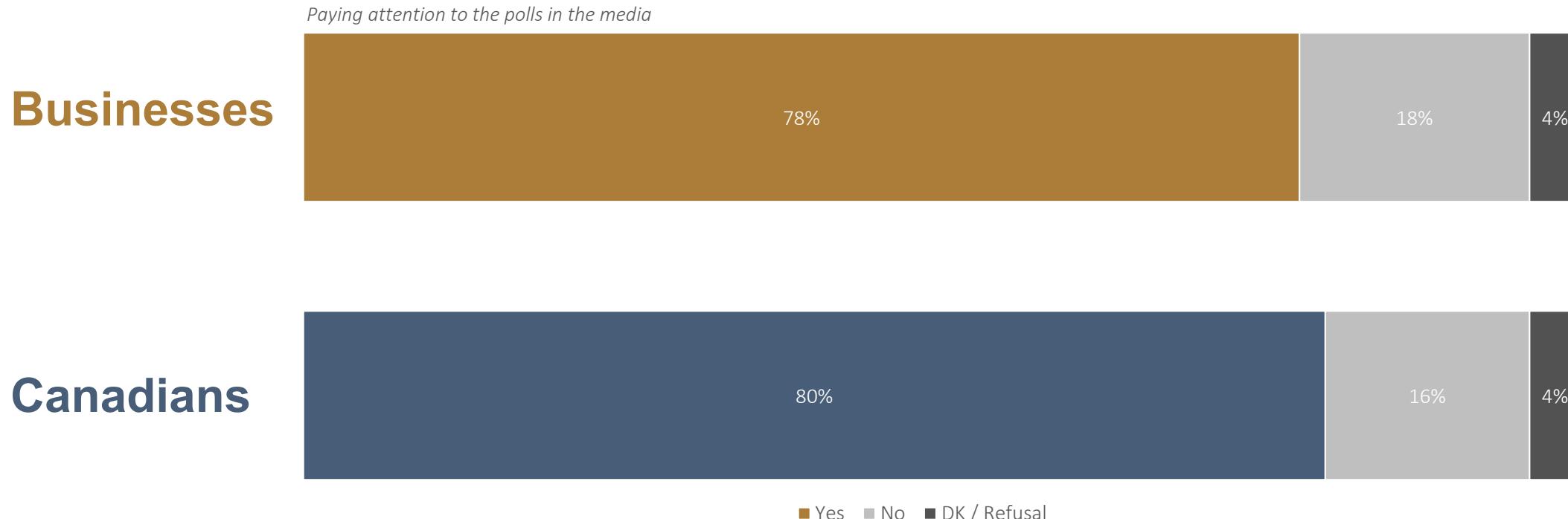
Significantly lower or higher

Overall, businesses and Canadians pay attention to polls reported in the media.

THE VALUE OF RESEARCH
2022

CRIC
14

Among business executives, this percentage climbs into the 90s among those with a high degree of trust in the industry already (90%) and those who believe public opinion polls have a *positive* impact on democracy (92%). The youngest business executives, however, are less likely pay attention (those 18-34: 67% vs. 83% among those 35+). A similar pattern is observed among Canadians: percentages here are higher among those with a high degree of trust in the industry already (91%), those who believe public opinion polls have a *positive* impact on democracy (91%), and those who believe that, during elections, polls are accurate (96%).



0009 Generally speaking, if polls are reported in the media, do you pay attention, read or listen to them?

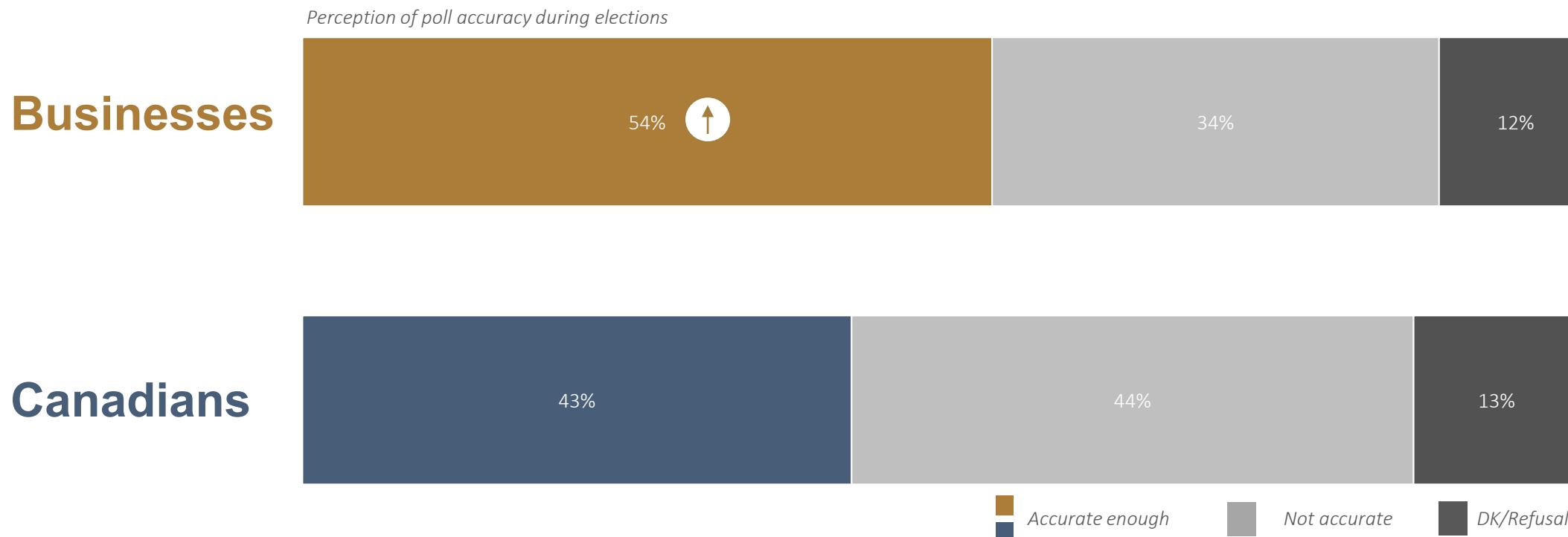
Base: All business decision and/or policy makers and influencers surveyed (n=303) / All Canadians (n=1004).

Businesses are more likely to believe polls are accurate (vs. the general public).

THE VALUE OF RESEARCH
2022

CRIC
15

Perceived accuracy is higher among business executives (54% vs. 43% among members of the general public). This is consistent with the earlier question (Q8) that found that business executives were more willing to participate in a survey if they know that the firm administering the survey is guided by strict rules and standards. Among business executives with a high degree of trust in the industry already, 71% believe polls are accurate enough during elections, and among those who believe public opinion polls have a *positive* impact on democracy it's 69%; among those who pay attention to public opinion polls in the media, it's 62%. Older business executives are less likely to believe this, though (those 50+: 44% vs. 59% among those <50 years of age).



0010 During elections, do you think the polls are accurate enough or not accurate enough?

Base: All business decision and/or policy makers and influencers surveyed (n=303) / All Canadians (n=1004).



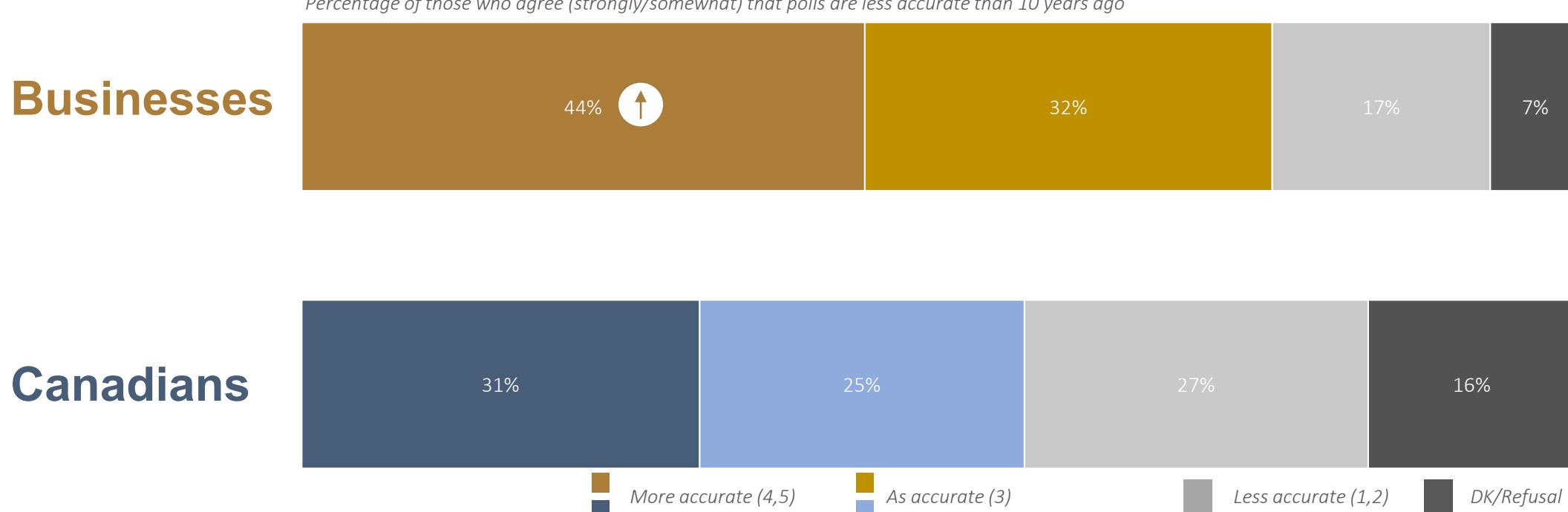
Significantly lower or higher

Most believe polls are at least as accurate or more accurate than 10 years ago.

THE VALUE OF RESEARCH
2022

CRIC
16

In addition, nearly one third of Canadians and nearly half of the business executives believe polls have become *more accurate* in the last decade (31% and 44%, respectively). Among business executives, this percentage is higher among those with a high degree of trust in the industry already (65%), those who believe public opinion polls have a *positive impact* on democracy (63%), those who pay attention to public opinion polls in the media (51%), as well as among the youngest of them (those 18-34: 57% vs. 39% among those 35+). Among Canadians, this percentage is higher among those with a high degree of trust in the industry already (44%), those who believe public opinion polls have a *positive impact* on democracy (43%), and those paying attention to public opinion polls in the media (35%).



0011 Do you think the polls are more accurate, as accurate, or less accurate than they were 10 years ago?
Base: All business decision and/or policy makers and influencers surveyed (n=303) / All Canadians (n=1004).

Significantly lower or higher

Half the business execs are aware of CRIC, but only a quarter of Canadians are.

THE VALUE OF RESEARCH
2022



17

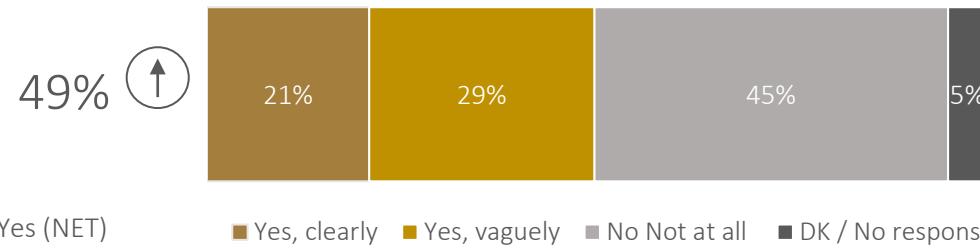
Awareness of a professional body that sets the standards and ethics codes for polling research in Canada (CRIC or otherwise) hovers around the 50% mark for business executives.

Unsurprisingly, familiarity among business executives is about two times higher than the general public's (51% vs. 26%, respectively).

Businesses

Q12b Are you familiar with **any professional body** that sets the standards and ethics codes for polling research in Canada?

Base: Half of the business decision and/or policy makers and influencers surveyed (n=152) / Canadians (n=487).



Canadians

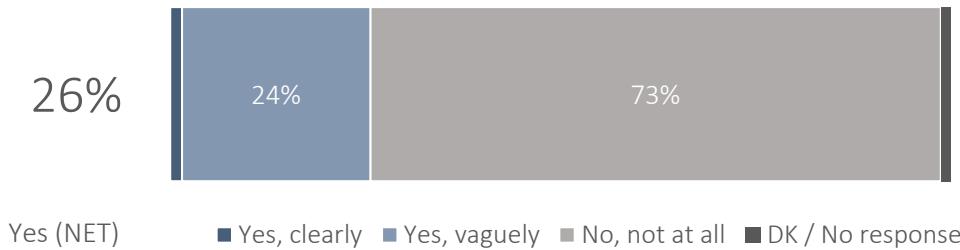
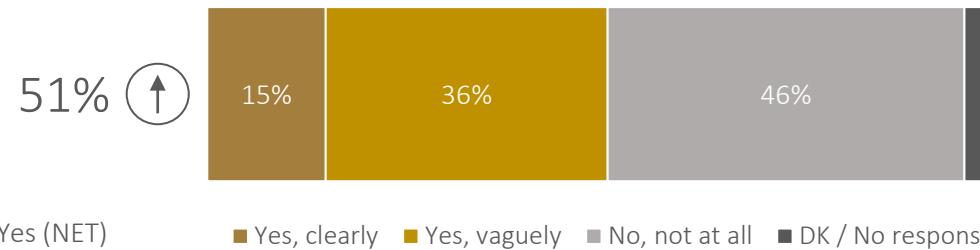


Yes (NET) ■ Yes, clearly ■ Yes, vaguely ■ No, not at all ■ DK / No response

Yes (NET) ■ Yes, clearly ■ Yes, vaguely ■ No, not at all ■ DK / No response

Q12a Are you familiar with the **Canadian Research Insights Council (CRIC)**, the Canadian polling industry's professional body that sets the standards and ethics codes for polling research in Canada?

Base: Half of the business decision and/or policy makers and influencers surveyed (n=151) / Canadians (n=517).



Yes (NET) ■ Yes, clearly ■ Yes, vaguely ■ No, not at all ■ DK / No response

Yes (NET) ■ Yes, clearly ■ Yes, vaguely ■ No, not at all ■ DK / No response

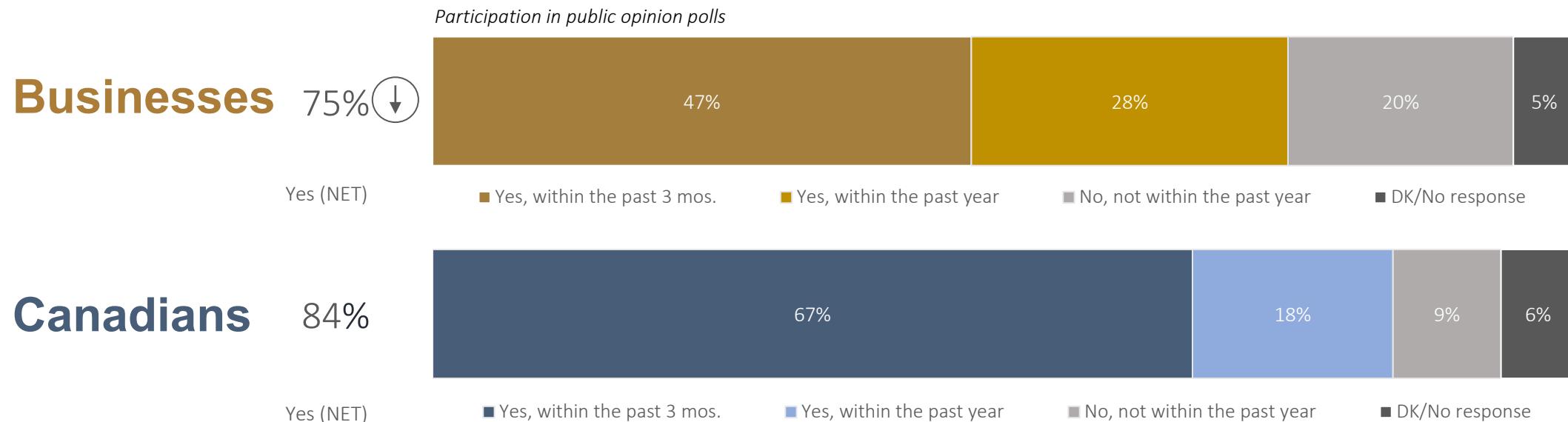
Significantly lower or higher

Canadians are more likely to have participated in a survey than businesses.

THE VALUE OF RESEARCH
2022

CRIC
18

More than eight-in-ten Canadians (85%) have participated in a survey in the past year, and just over a third participated within the past three months. Three quarters of Canadian business executives (75% participated in a survey in the past year, with nearly half (47%) having done so in the past three months). Overall, recent participation among business decision and/or policy makers and influencers is higher among men (79% vs. 69% among women) – especially when looking at the past three months (54% vs. 37% among women) – and those who pay attention to public opinion polls in the media were nearly two times more likely to have recently completed a public opinion survey (83% vs. 44% among those who do not).



0013 Have you recently participated in a public opinion survey?

Base: All business decision and/or policy makers and influencers surveyed (n=303) / All Canadians (n=1004).



Significantly lower or higher

CRIC

CANADIAN RESEARCH
INSIGHTS COUNCIL

The Value of Research

April 2022

For more information contact:
john.tabone@canadianresearchinsightscouncil.ca