



Canadian Research Insights Council - Size of the Industry Report

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CRIC projects strong industry growth in 2021 after demonstrating resilience in 2020.

The Canadian Research Insights Council (CRIC), the voice of Canada's research, analytics and insights industry estimates the Canadian industry generated \$813 million (CAD) in revenue in 2020. Despite the challenges related to the pandemic, the industry demonstrated its resiliency by maintain revenues that were consistent with 2019 (-1.4%). This compares to Canada's real GDP that shrank 5.4% in 2020, the largest drop Statistics Canada has reported since it began collecting this statistic in 1961. While other industries were harder hit by the pandemic, we believe that business and organizations across Canada recognized that insights were more critical than ever given the pandemic's impact on the priorities, attitudes and behaviours of Canadians.

While the industry as a whole performed relatively well during this challenging year, the impact was not proportionate. Agencies that generated a large amount of their revenue from face-to-face research and/or from clients in industries that were the hardest hit including tourism, travel, restaurants and recreation, saw more significant declines in revenue. Online methods, both qualitative and quantitative, accounted for about two thirds of research in 2020. Not surprisingly, companies that focused exclusively on online research fared better with some reporting moderate growth in 2020. The Canadian industry further demonstrated its resiliency in 2020 by seamlessly adapting to a remote work environment and embracing innovation in their research designs. The Canadian industry delivered the critical insights their clients needed while meeting COVID-19 safety protocols to keep staff, clients and research participants safe.

As vaccination rates increase and COVID-19 protocols begin to lift, the need for insights in Canada is expected to grow in 2021. Revenues are projected to grow by 17% in 2021 as more businesses seek insights to adapt and refine their products, services and marketing. This projection is subject to the risk of further disruption by a fourth wave of COVID 19 and its variants. The Canadian industry employed over 8300 workers in 2020 (estimated 4400 full time, 3500 part-time and 400 contractors) and this number is anticipated to grow by 10% in 2021 to meet the increasing demand.

Total Revenues 2018-2021

	2018	2019	2020	2021
Revenues (000s)	\$825,200	\$824,500	812,626	\$952,722
Change		-0.1%	-1.4%	17.2%

Revenue in 2020 by Major Categories

Quantitative Methods (includes mail, telephone CATI, F2F (PAPI / CAPI), online quantitative research, mobile / smartphone quantitative research, audience measurement, online / web analytics, automated digital/electronic, and social media monitoring.)	73%
Qualitative Methods (include F2F group discussions / focus groups, in-depth F2F interviews, online qual, mobile qual, traditional / digital ethnography, online research communities.)	15%
Reporting (includes consulting firm research, advisory services, marketing reports/research and all other secondary (desk) research.	11%
Other research/analytics revenues not included in the categories above.	1%

Quantitative Methods by subcategory

Telephone CATI (including CATI to mobiles, i.e., a person-to-person interview and IVR interviews)	17%
Face-to-face (PAPI-paper and pencil interview. CAPI-computer-assisted personal interviewing)	3%
Online quantitative research (including CASI - "self-interviewing" - and online panel)	70%
Mobile / Smartphone quantitative research	5%
Audience Measurement	3%
Online / Web analytics (includes content tracking, digital tracking, CRM analytics and all advanced analytics)	1%
Automated digital / electronic (includes interactive voice recorded interviews, location-based services, passive metering and log file processing)	0%
Social media monitoring	1%
Other quantitative methods not included above.	0%

Qualitative Methods by subcategory

F2F Group discussions / Focus groups	30%
In-depth face to face interviews	12%
Online Qual (online groups, discussions, bulletin boards)	23%
Mobile Qual (mobile ethnography, mobile diaries, photo boards)	12%
Traditional Ethnography	1%
Online research communities (includes social media, in-depth interviews & online ethnography) & social media listening	18%
Other qualitative methods not included above.	6%

**does not total 100 due to rounding*

Data Sources

2018 and 2019 revenues are based on market size estimates published by IBIS World. 2020 and 2021 estimates/projections are based on the Canadian Research Insights Council's Industry Sizing survey. 28 research agencies participated in the survey. Data was weighted based on the 2020 revenues of those agencies who participated.

Note: To see how Canada compares to the rest of the world, view the [2021 ESOMAR Global Market Research](#) report that is available as a free download to ESOMAR members. If you are not already an ESOMAR member, be sure to take advantage of this [special offer](#) from CRIC when applying to join ESOMAR.