



Canada's National Quantum Strategy Survey - 2026

Final report

Prepared for Innovation, Science and Economic Development Canada (ISED)

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Prepared for Innovation, Science and Economic Development Canada (ISED) by Nanos Research

March 2026

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About this report

This report begins with an executive summary outlining key findings and conclusions, followed by a detailed analysis of the quantitative results. A detailed set of “banner tables” is provided under a separate cover; this presents results for all survey questions by key segments such as region, knowledge of federal programming supporting quantum research and development and awareness of NQS.

The quantitative results are expressed as percentages unless otherwise noted. In the case where the responding sample was less than 30 cases, results were expressed numerically (not percentages, for example 24 of 26 respondents said ‘x’). Readers should also exercise caution for possible changes within small subsamples.

Detailed findings are presented in the sections that follow. Overall results are presented in the main portion of the narrative and are typically supported by graphic or tabular presentation of results. Net results cited in the text may not exactly match individual results shown in the charts due to rounding. Results may not add to 100% due to rounding or multiple responses.

The bullets under the charts also note any significant differences between sub-groups of respondents in different demographic groups.

The survey consisted of two streams: Stream 1: Industry/Non-profits and Stream 2: Academics. The following report contains findings from the two streams, and it is noted throughout whether the findings relate to the Industry stream and/or the Academic stream. Section 1 contains questions only asked of Stream 1 respondents, Section 2 contains questions only asked of Stream 2 respondents and Section 3 contains questions asked of both streams.

Details of the methodology and sample characteristics can be found in Appendix A. The final survey instrument can be found in Appendix B.

Executive summary

A. Background and objectives

Quantum science, an emerging field at the forefront of research and innovation, holds immense potential to revolutionize various industries. From developing life-saving drugs to creating next-generation batteries, quantum technologies are set to reshape how we design and develop many things. Canadian scientists and entrepreneurs are poised to capitalize on these opportunities and become leaders in this fast-growing field.

The National Quantum Strategy (NQS) is an initiative to bolster Canada's quantum sector and ensure its prominent position among global frontrunners. The NQS revolves around three key pillars: research, talent, and commercialization. Through strategic investments and targeted support, the NQS endeavours to achieve key missions in quantum computing hardware and software, communications, and sensors.

Launched on January 13, 2023, the NQS aims to catalyse the growth of Canada's quantum sector and solidify its leadership in this transformative field. Specifically, the NQS seeks to amplify Canada's existing strength in quantum research, foster growth of quantum technologies and establish Canada as a global leader. To fulfil its responsibilities and ensure the effectiveness of the strategy, the NQS Secretariat housed in Innovation, Science, and Economic Development Canada (ISED) has committed to addressing data gaps and tracking progress. The NQS Secretariat retained Nanos Research to conduct a second quantitative survey building off the 2024 wave, targeting two key groups: Canadian businesses operating in the quantum field and academics specializing in quantum. The primary objective of this research is to gain deeper insights into the Canadian quantum ecosystem.

Objectives

- Filling identified data gaps and tracking key performance indicators;
- Assessing critical aspects of the quantum ecosystem, such as inter-sector collaboration, quantum products and service adoption, the evolving quantum job market and quantum community awareness of NQS programming; and,
- Providing a more comprehensive and data-driven understanding of the quantum landscape in Canada.

B. Methodology

The survey was conducted online and was deployed to a list provided by ISED and a total of 86 individuals participated. The sample included 41 individuals in businesses/non-profits in the quantum sector (35 unique businesses) and 45 academics (15 unique universities/institutes) in the quantum sector. The survey had a response rate of 20%.

The survey consisted of two streams: Stream 1: Industry/Non-profits and Stream 2: Academics. The questionnaire consisted of separate modules for each stream with questions asked that are relevant to each, as well as several core questions which were the same for both streams.

The fieldwork was conducted between February 18th and March 9th, 2026. Details on the rate of participation can be found in Appendix A, and the questionnaire is provided in Appendix B.

C. Contract value

The contract value was \$74,956.74 (including HST).

Supplier name: Nanos Research

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For more information, contact ISED at publicopinionresearch-recherchesurlopionpublique@ised-isde.gc.ca

D. Political neutrality statement and contact information

I hereby certify, as a Representative of Nanos Research, that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Government of Canada's Policy on Communications and Federal Identity and Directive on the Management of Communications. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, party standings with the electorate, or ratings of the performance of a political party or its leaders.



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E. Key findings

The survey consisted of two streams: Stream 1: Industry/Non-profits and Stream 2: Academics. The following key findings and report contain findings from the two streams, and it is noted throughout which stream the findings relate to.

Research and collaborations

When asked what areas they or their organization conduct research and development, industry and academic respondents report a similar focus on quantum sensors and quantum communication and cryptography. Quantum sensors were reported as an area of R&D for both academic (51%) and industry (46%) respondents, with quantum communication and cryptography being another focus area in which both academic (42%) and industry (46%) streams conducted research and development. Areas of research and development where the academic stream had a higher level of focus were quantum materials (47% compared to 15% of industry respondents) and quantum computing hardware (47% of academics compared to 32% of industry respondents). Quantum computing hardware research and development in the industry stream declined from the 2024 wave, dropping from 46 percent to 32 percent in the 2026 wave.

Industry and academic respondents unanimously report collaboration with others in the quantum ecosystem. Academics are more likely to report collaborating with universities or colleges in other countries (93%; 78% in 2024) or universities in Canada (91%; 87% in 2024) with 80 percent reporting collaboration with companies located in Canada (67% in 2024). Industry respondents most often report collaborating with Canadian universities and colleges (81%; 85% in 2024) and companies located in Canada (76%; 77% in 2024), as well as companies located outside of Canada (66%; 71% in 2024) and Canadian Federal government laboratories such as the National Research Council (NRC) (66%; 64% in 2024). No respondents from academic or industry streams reported not collaborating with any other entities.

In terms of rating the importance of collaborations, both industry and academic streams placed similar levels of importance on collaborating with companies located in Canada (industry: mean of 8.0; academic mean of 7.7). Industry respondents placed higher levels of importance in collaborating with entities such as Canadian Federal government laboratories such as the National Research Council (NRC) (industry: mean score of 7.9; academic mean score of 7.1) and companies located outside of Canada (mean of 7.8; compared to mean of 5.8 for academic respondents), while academic respondents reported higher importance of collaborating with universities and colleges in other countries (mean of 8.5; compared to mean 5.8 for industry respondents).

Both academic and industry respondents often mention innovation, advancing knowledge and the sharing of new ideas as the primary benefits of collaboration (43% of academics; 51% of industry respondents). Other benefits industry respondents listed were building an ecosystem (18%; 8% in 2024) and the validation of technology (15%; 2% in 2024). Academic respondents reported that complementary/specialized expertise (26%) was another benefit of collaboration. Additionally, both groups mention that the main output from these collaborations has been ongoing research collaboration or just ongoing collaboration (100% of academics; 80% of industry respondents). With academic respondents listing publication (98%; 84% in 2024) and conference presentation (91%; 68% in 2024) as the main output from collaboration.

Talent

Just under four in five academic respondents report their department has tried to hire a new faculty member in quantum in the past six months (77%; 57% in 2024). More than 65 percent of industry/non-profit respondents report their organization has tried to fill positions in the last six months for which a quantum science and technology background is important. All twenty-six industry respondents report the search took place primarily within Canada, followed by the US (11 out of 26) or Europe (7 out of 26) and close to eight in ten say their organization is likely (54%; 61% in 2024) or somewhat likely (24%; 18% in 2024) to hire candidates in the next six months.

Twenty-two out of 26 (85%) industry respondents report their organization found qualified Canadian candidates that met their needs, an increase from 61% in 2024, and 22 out of 26 (85%) report their organization filled some (14 out of 26 (54%); 42% in 2024) or all (8 out of 26 (31%); 22% in 2024) of the positions they were hiring for. Industry respondents (15 out of 26 (58%); 64% in 2024) said the most effective recruiting tools were social media (including LinkedIn), followed by job posting websites (i.e., monster.ca, Indeed) (12 out of 26 (46%); 38% in 2024).

Industry respondents reported that a lack of qualified candidates (11 out of 26 respondents (42%); 36% in 2024), candidate expectations (i.e., salary and benefits) (6 out of 26 (23%); 27% in 2024), immigration barriers (3 out of 26 (12%); 22% in 2024) and candidates unwilling to relocate (3 out of 26 (12%); 7% in 2024) represented the main barrier to hiring someone to work at their organization. Industry respondents feel the biggest shortages of qualified candidates in the sector are in quantum sensors (51%; 44% in 2024). Quantum computing hardware (37%; 49% in 2024), quantum software (29%; 46% in 2024), quantum communications and cryptography (27%; 47% in 2024) and quantum materials (27%; 33% in 2024) all saw decreases in the number of respondents that reported there being a shortage of skilled people in these sectors in Canada.

Persons with disabilities (10%; 28% in 2024) and Indigenous peoples (5%; 17% in 2024) are two groups of people who are significantly underrepresented in industry respondents' organization's workforce today. Consistent with the 2024 wave, industry respondents noted women were the top reported underrepresented group present in their organization's workforce (85%; 86% in 2024), followed by racialized persons (73%; 72% in 2024) and the 2SLGBTQIA+ community (44%; 49% in 2024). The biggest challenges for Industry to have a diverse workforce included: few diverse candidates available to fill jobs and a lack of qualified candidates in a field that is already not diverse (11 out of 24 respondents (46%); 43% in 2024), and that skills and talent are more important (4 out of 24 (17%); 19% in 2024). An additional 4 out of 24 (17%) industry respondents stated that they had no issues or that it wasn't a challenge hiring a more diverse workforce.

Academic respondents are more than almost twenty times more likely to report that they are likely or somewhat likely (87%) to remain in Canada over the next five years to pursue their research rather than unlikely or somewhat unlikely (4%).

Compared to 2024 academic respondents report that there is more representation for underrepresented groups included in the workforce of their academic department. Respondents most often report that women are represented in their department (71%; 58% in 2024), followed by racialized persons (69%; 42% in 2024), 2SLGBTQIA+ community members (49%; 33% in 2024), persons with disabilities (36%; 22% in 2024) and Indigenous people (22%; 7% in 2024), while 16 percent of academics (27% in 2024) report none of these groups

are represented. When asked about the major challenges related to cultivating a more diverse workforce, the top response for academics is that there are few diverse candidates available to fill jobs and a lack of applications (11 out of 24 of industry respondents (46%), 43% in 2024; 8 out of 24 of academics (33%), 41% in 2024).

Commercialization of research

Two in three respondents across both the industry and academic streams (67%; 54% in the 2024 wave) reported that they or their organization have filed a patent related to quantum technologies, while 33 percent report that they have not. Among respondents in the academic stream, 78 percent have filed a patent related to quantum technologies, while 56 percent of respondents in the industry stream report having filed such a patent. Additionally, four in five industry and academic respondents report they have engaged potential end users of their product and/or service within the past year (80%; 78% in the 2024 wave), with industry respondents more likely to report having done this (98%; 88% in the 2024 wave) than academic respondents (64%; also 64% in the 2024 wave).

When asked about the level of interest potential end users have in adopting quantum technologies, a vast majority of industry and academic respondents say end users are interested (65%; 63% in the 2024 wave) or somewhat interested (26%; 34% in the 2024 wave), but they are less likely to say end users are comfortable (29%; 20% in the 2024 wave) or somewhat comfortable (38%; 49% in the 2024 wave) with adopting quantum products or services.

Examining barriers to end users adopting quantum solutions, industry respondents most often said that there is a lack of knowledge and understanding of the technology by end users (30%; 20% in the 2024 wave), that it is too early for adoption, and their work or technology is not ready yet (18%; 20% in the 2024 wave), and that use cases are still being proven and not adopted widely yet (15%; 21% in the 2024 wave). When academics were asked about barriers preventing the commercialization of their research, a similar sentiment was shared, as they also often said that it is too early and the work or technology is not ready yet (21%; 27% in the 2024 wave), along with commercialization being not applicable (also 21%; 9% in the 2024 wave).

Awareness and use of federal programs

Overall, both industry and academic respondents rate themselves as knowledgeable (77%; score of 7-10) of how federal programming can support quantum research and development (mean of 7.6 out of 10). Comparatively, in the 2024 wave, 71 percent of respondents reported themselves as knowledgeable in this regard, with a mean score of 7.4 out of 10.

Survey respondents indicated a high level of awareness of many federal quantum-related programs supporting commercialization, for example, a majority of industry and academic respondents report having heard of the NRC Challenge Programs (88%; 84% in the 2024 wave), followed by the NRC Industrial Research Assistance Program (IRAP) (87%; also 87% in the 2024 wave), and the Innovation for Defence Excellence and Security (IDEaS) (83%; 81% in the 2024 wave). Industry and academic respondents who had heard of federal programs supporting commercialization were most likely to report having applied for and received funding from Innovative Solutions Canada (ISC) (46% of those aware applied for and received funding), followed by IRAP (36%), IDEaS (30% of those aware applied for and received funding) and NRC Challenge Programs (28% of those aware applied for and received funding). In specific comments on their engagements with federal programs that support commercialization, industry and academic respondents noted that the programs are good, useful, or

they had a great experience (18%; 5% in the 2024 wave), but at the same time, noted that there are too many requirements, and they should be relaxed (16%; 10% in the 2024 wave) and that the application or approval process for these federal programs supporting commercialization is too long or complex (11%; 20% in the 2024 wave).

In terms of federal programs that support research, both industry and academic respondents were most likely to report having heard of the NSERC Alliance Quantum program (87%; also 87% in the 2024 wave), while four in five report they have heard of the Canadian Institute for Advanced Research (82%; 67% in the 2024 wave). Just under one in ten report awareness of the Bank of Canada PIVOT program (7%; 12% in the 2024 wave).

Just over two in five industry and academic respondents who have heard of the NSERC Alliance Quantum program report they applied for and received funding (45%; 3% report they have applied, and the decision is pending). Comparatively, 32 percent reported having applied for and received funding and 21 percent reported having applied for funding and the decision was pending in the 2024 wave. About one in ten academic and industry respondents who report having heard of NSERC Alliance Quantum reported having applied for but not received funding (12%; 6% in the 2024 wave).

One in five industry and academic respondents who report having heard the Canadian Institute for Applied Research (CIFAR) reported having applied for and received funding from CIFAR (19%; 20% in the 2024 wave), while six percent report having applied for but not receiving funding from CIFAR (two percent in the 2024 wave). When asked for comments on their engagements with these federal programs, industry and academic respondents mentioned the Alliance program doesn't fund companies or the private sector (four out of 29 responses (14%); 24% of responses in the 2024 wave), that they have had a positive experience with Alliance (4 out of 29 responses (14%); 6% of responses in the 2024 wave), and that there is a need for flexible funding calls (four out of 29 responses (14%); 3% of responses in the 2024 wave).

For federal programs that support talent, nearly all industry and academic respondents reported having heard of the Mitacs program (99%; 98% in the 2024 wave), while four in five had heard of NSERC CREATE (80%; 77% in the 2024 wave). Seven in ten industry and academic respondents who have heard of Mitacs report they have applied for and received funding (71%; 59% in 2024), while two in five have received funding from NSERC CREATE (41%; 31% in the 2024 wave). Sixteen percent of respondents reported that they applied for but did not receive funding from NSERC CREATE (11 percent of respondents in the 2024 wave).

Eleven out of 25 (44%) industry and academic respondents commented that the federal programs supporting talents are good programs and they have applied successfully (25% in the 2024 wave), five out of 25 (20%) industry and academic respondents said that that funding is not enough to be worth it and there is a need for more programs to be funded (16% in the 2024 wave), and three out of 25 (12%) respondents each noted that the programs don't apply to industry and they must go through academia to apply (25% in the 2024 wave) and that programs are difficult to apply for or have too many requirements (25% in the 2024 wave).

Views on the National Quantum Strategy (NQS)

Nearly all industry and academic respondents (98%; also 98% in the 2024 wave) reported being aware that Canada released its National Quantum Strategy (NQS) in January 2023, with over two in five of those aware of the strategy, saying they are satisfied with the three main aspects of the NQS: enabling the government and key industries to be developers and early adopters of new quantum technologies (57% satisfied, mean score of 6.6 out of 10), making Canada a world leader in the continued development, deployment and use of quantum computing hardware and software (54% satisfied, score of 7-10, mean score of 6.6 out of 10), and ensuring the privacy and cyber security of Canadians in a quantum enabled world, through a national secure quantum

communications network and a post-quantum cryptography initiative (44% satisfied, mean score of 6.3 out of 10).

Over two in three industry and academic respondents who have heard of the NQS agree (22%; also 22% in the 2024 wave) or somewhat agree (49%; 47% in the 2024 wave) that the NQS missions create clear priorities for quantum in Canada, while one in four somewhat disagree (13%; 16% in the 2024 wave) or disagree (11%; 10% in the 2024 wave). When asked why they have that opinion (either positive or negative), industry and academic respondents mentioned the mission and priorities are clear (20%; 8% in the 2024 wave), that priorities are not clearly defined (16%; 9% in the 2024 wave), and that implementation being is or there have been issues with implementation (14%; 12% in the 2024 wave).

A majority of industry and academic respondents aware of the NQS (88%; 86% in the 2024 wave) report they have received information from the Federal Government concerning events related to the NQS, including workshops, roundtables, and missions.

Detailed findings

Section 1 – Quantum Businesses

A. General questions

This section included general questions to help profile responding organizations.

Industry respondents most often reported that their head offices were located in Ontario (42%; 54% in 2024), Quebec (32%; 20% in 2024) or the West (24%). The majority (55%) report having offices in no other locations, while those that do in Canada, mainly have offices in Ontario (25%), British Columbia (13%), or Alberta (10%). A quarter of industry/non-profit respondents report having offices abroad, including in the USA (13%) and Germany (5%). In addition, respondents identified that their remote workers were located in Ontario (38%; 48% in 2024), Quebec (19%; 32% in 2024) or the United States (19%; 14% in 2024), while 35% (27% in 2024) report their organization has no remote employees.

Half of business respondents (48%; 50% in 2024) responded that their organization has 1 to 9 full-time staff (including themselves) employed in Canada working on quantum technologies, while 18% (20% in 2024) have 10 to 19 full-time employees, and 8% (15% in 2024) report having 20 to 29 employees. About one half of respondents report their organization has been in business for less than 5 years (17%; 32% in 2024) or for 5 to 9 years (39%). A further 22% (an increase from 11% in 2024) of respondents work for organizations that have been in business for 10-14 years. Fifteen percent (20% in 2024) responded that their organization has been in business for 20 years or more.

Other office locations

Q4 – Does your organization have offices in other provinces and territories that work on quantum technologies? (please specify) Select all options that apply.

Location(s) of other offices

Location	2026-03 (n=40)	2024-03 (n=59)
No other locations	55.0%	44.1%
Ontario	25.0%	28.8%
British Columbia	12.5%	13.6%
U.S.A	12.5%	8.5%
Alberta	10.0%	13.6%
Germany	5.0%	1.7%
Quebec	5.0%	20.3%
Japan	2.5%	3.4%
Korea	2.5%	-
Newfoundland and Labrador	2.5%	1.7%
Nova Scotia	2.5%	1.7%
Saskatchewan	2.5%	1.7%
Spain	2.5%	-
U.K.	-	5.1%
Several countries/worldwide	-	5.1%
Europe	-	3.4%
Manitoba	-	1.7%
New Brunswick	-	1.7%
Northwest Territories	-	1.7%
Nunavut	-	1.7%
Prince Edward Island	-	1.7%
Yukon	-	1.7%
Ireland	-	1.7%
Hong Kong	-	1.7%
France	-	1.7%

Base: Individuals in industry or non-profits in the quantum sector, n=40, based on multiple mentions.

Location of employees working remote

Q5 – Does your organization have remote employees in any of the following provinces and territories that work on quantum technologies? (please specify) Select all options that apply.

Location of remote employees

Location	2026-03 (n=37)	2024-03 (n=59)
Ontario	37.8%	47.5%
No other locations*	35.1%	27.1%
Quebec	18.9%	32.2%
U.S.A	18.9%	13.6%
British Columbia	13.5%	22.0%
Alberta	5.4%	18.6%
Germany	5.4%	-
Italy	2.7%	-
New Brunswick	2.7%	1.7%
Newfoundland and Labrador	2.7%	-
New Zealand	2.7%	-
Saskatchewan	2.7%	1.7%
Spain	2.7%	-
UK	2.7%	6.8%
No remote employees	-	
Global/several countries	-	5.1%
Japan	-	3.4%
Nova Scotia	-	1.7%
Romania	-	1.7%
Poland	-	1.7%
India	-	1.7%
France	-	1.7%
Europe	-	1.7%
Germany	-	1.7%
Belgium	-	1.7%
China	-	1.7%

Base: Individuals in industry or non-profits in the quantum sector, n=37, based on multiple mentions.

*Changed from No remote employees

Number of full-time employees in Canada

Q6 – Including yourself, approximately how many full-time staff does your organization employ in Canada that work on quantum technologies?

Number of full-time employees

Number	2026-03 (n=40)	2024-03 (n=66)
1 to 9	47.5%	50.0%
10 to 19	17.5%	19.7%
20 to 29	7.5%	15.2%
30 to 39	7.5%	3.0%
40 to 49	5.0%	1.5%
50 to 99	7.5%	-
100 or more	7.5%	10.6%

Base: Individuals in industry or non-profits in the quantum sector, n=40

Number of years organization has been in business

Q7 – How many years has your organization been in business?

Years in business

Years	2026-03 (n=41)	2024-03 (n=65)
Less than 5 years	17.1%	32.3%
5 to 9 years	39.0%	33.8%
10 to 14 years	22.0%	10.8%
15 to 19 years	7.3%	3.1%
20 years or more	14.6%	20.0%

Base: Individuals in industry or non-profits in the quantum sector, n=41

B. Research and development

Industry respondents most often report their organization conducts research and development related to quantum communication cryptography (46%; 44% in 2024), quantum sensors (46%; 39% in 2024), quantum computing hardware (32%; 46% in 2024) and quantum software (22%; 35% in 2024).

In terms of collaboration with various entities, industry respondents report that their organization collaborates with universities and colleges in Canada the most (80%), followed by companies located in Canada (76%), companies located outside of Canada (66%) and Canadian Federal government laboratories such as the National Research Council (NRC) (66%). Results are consistent with the 2024 wave. None of the 41 respondents reported their organization does not collaborate with any of these entities.

The highest level of importance for collaborations with their organization was given to companies located in Canada (mean of 8.0 out of 10; 8.2 out of 10 in 2024) or Canadian Federal government laboratories such as the National Research Council (NRC) (mean of 7.9 out of 10; 7.3 out of 10 in 2024), followed by companies located outside of Canada (mean of 7.8; 8.1 out of 10 in 2024). Although, still more likely to be seen as important rather than not important, collaborations with universities and colleges in other countries received a relatively lower importance score (mean of 5.8 out of 10).

Main benefits to collaborations were seen as innovation and advancing research and development in Canada (29%; 37% in 2024), followed by a knowledge and information exchange (21%; 18% in 2024), building an ecosystem (18%; 8% in 2024) and validation of technology (15%; 2% in 2024). In addition, those who report their organization collaborates said that the main outputs from these collaborations are ongoing collaboration (80%; consistent with 79% in 2024), a publication (65%; 46% in 2024), an expanded network (60%; 70% in 2024), a prototype (53%; 54% in 2024), a market-ready product or service (53%; 51% in 2024), and a conference presentation (48%; 43% in 2024).

Areas of research and development in quantum technologies

Q8 – In which areas does your organization conduct research and development in quantum technologies? [SELECT ALL THAT APPLY]

Areas of research and development

Area	2026-03 (n=41)	2024-03 (n=66)
Quantum communications and cryptography	46.3%	43.9%
Quantum sensors	46.3%	39.4%
Quantum computing hardware	31.7%	45.5%
Quantum software	22.0%	34.8%
Quantum materials	14.6%	13.6%
Networking	4.9%	-
Other	7.3%	-
Quantum technologies (general)	-	4.5%
Market Research	-	1.5%
AI	-	1.5%
Photonics	-	1.5%
Banking sector	-	1.5%
Deep Technology	-	1.5%
Fibre optics	-	1.5%
Quantum training and education	-	1.5%
Economic development	-	1.5%
Investments in quantum	-	1.5%

Base: Individuals in industry or non-profits in the quantum sector, n=41, based on multiple mentions

Collaborations with various entities

Q9 – Does your organization collaborate with the following entities? [RANDOMIZE] [SELECT ALL THAT APPLY]

Collaborating with entities

Type of entity	2026-03 (n=41)	2024-03 (n=66)
Universities/colleges in Canada	80.5%	84.8%
Companies located in Canada	75.6%	77.3%
Companies located outside of Canada	65.9%	71.2%
[TWEAKED] Canadian Federal government laboratories such as the National Research Council (NRC)	65.9%	63.6%
[TWEAKED] Canadian research institutes such as the Institute for Quantum Computing (IQC)	53.7%	54.5%
Government laboratories or international research institutes in other countries, such as the U.S. Department of Energy	53.7%	42.4%
Universities/colleges in other countries	43.9%	48.5%
None of the above	-	4.5%

Base: Individuals in industry or non-profits in the quantum sector, n=41, based on multiple mentions

Importance of collaborating with various entities

Q10-16 – On a scale from 0 to 10, where 0 is not at all important and 10 is very important, how important is it for your organization to collaborate with the following entities to advance your research interests? [RANDOMIZE]

Importance of collaborations

Type of entity (n=41)	Not important (0-3)	Neutral (4-6)	Very Important (7-10)	2026-03 Mean (n=41)	2024-03 Mean (n=66)
Companies located in Canada	5.0%	20.0%	75.0%	8.0	8.2
[TWEAKED] Canadian Federal government laboratories such as the National Research Council (NRC)	7.5%	5.0%	87.5%	7.9	7.3
Companies located outside of Canada	4.9%	19.5%	73.2%	7.8	8.1
Universities/colleges in Canada	4.9%	14.6%	80.5%	7.6	7.9
Government laboratories or international research institutes in other countries, such as the U.S. Department of Energy	17.1%	22.0%	56.1%	6.8	7.1
[TWEAKED] Canadian research institutes such as the Institute for Quantum Computing (IQC)	17.9%	20.5%	53.8%	6.5	7.4
Universities/colleges in other countries	24.4%	34.1%	39.0%	5.8	6.1

Base: Individuals in industry or non-profits in the quantum sector, n=41

Benefits and output from collaboration

Q17 – [IF COLLABORATES WITH ANY ORGS IN Q8] What is the main benefit for your organization, if any, of these collaborations? [OPEN]

Main benefits of collaboration

Benefit	2026-03 (n=34)	2024-03 (n=51)
Innovation/Advance research and development	29.4%	37.3%
Knowledge/Information exchange	20.6%	17.6%
Building an ecosystem	17.6%	7.8%
Validation of technology	14.7%	2.0%
Revenue	5.9%	5.9%
Other	5.9%	3.9%
Access to talent	2.9%	15.7%
Risk management	2.9%	7.8%
Reducing workload	-	2.0%

Base: Individuals in industry or non-profits in the quantum sector, n=34 respondents who collaborate with at least one type of entity.

Q18 – [IF COLLABORATES WITH ANY ORG IN Q8] What has been the main output of these collaborations? [SELECT ALL THAT APPLY] [RANDOMIZE]

Main output from collaborations

Output	2026-03 (n=40)	2024-03 (n=63)
Ongoing collaboration	80.0%	79.4%
Publication	65.0%	46.0%
Expanded network	60.0%	69.8%
Prototype	52.5%	54.0%
Market-ready product or service	52.5%	50.8%
Conference Presentation	47.5%	42.9%
Patent	27.5%	30.2%
Sales	-	3.2%
Promoting business success	-	1.6%
Hiring	-	1.6%
White paper	-	1.6%

Base: Individuals in industry or non-profits in the quantum sector, n=40 respondents who collaborate with at least one type of entity, based on multiple mentions.

Barriers to collaboration

Q19 – [IF DOES NOT COLLABORATE WITH ANY ORGS IN Q8] What is the main barrier, if any, preventing your organization from collaborating? [OPEN]

NOTE: No respondent reported not collaborating with any organizations.

C. Talent

Just under two in three industry/non-profit respondents report their organization has tried to fill positions in the last six months for which a quantum science and technology background is important (65%), with the search taking place primarily within Canada (26 out of 26 respondents; 100%), followed by the US (11 out of 26 respondents; 42%) or Europe (7 out of 26; 27%). In addition, close to eight in ten say their organization is likely (54%) or somewhat likely (24%) to hire candidates in the next six months. The number of respondents who say that it is likely/somewhat likely to hire candidates in the next six months (78%; 79% in 2024) remains similar to the 2024 wave.

22 out of 26 (85%) industry/non-profit respondents report their organization found qualified Canadian candidates that met their needs (22 out of 26 respondents; 85%), and twice as many respondents report their organization filled some (14 out of 26 respondents; 54%) compared to those who responded that their organization hired all (8 out of 26; 31%) of the positions they were hiring for. Another 4 out of the 26 (15%) respondents say the process is still ongoing.

Respondents said the most effective recruiting tools were social media (including LinkedIn) (15 out of 26 respondents; 58%) and job posting websites (i.e., monster.ca, Indeed) (12 out of 26 respondents; 46%). When asked what the biggest barriers are to hiring for their organization, top responses included a lack of qualified candidates (11 out of 26 respondents; 42%) and candidate expectations (i.e., salary and benefits) (6 out of 26 respondents; 23%). These results are consistent with the 2024 wave.

Examining areas where respondents feel there are the biggest shortages of qualified candidates in the sector, top responses were quantum sensors (51%; 44% in 2024), quantum computing hardware (37%; 49% in 2024), quantum software (29%; 46% in 2024), quantum communications and cryptography (27%; 47% in 2024), and quantum materials (27%; 33% in 2024).

Women were the top reported underrepresented group present in their organization's workforce (85%), followed by racialized persons (73%) and the 2SLGBTQIA+ community (44%). Persons with disabilities (10%; 28% in 2024) and Indigenous peoples (5%; 17% in 2024) are the two groups that saw the largest decline in their organization's workforce. When asked what the biggest challenges are to have a diverse workforce, respondents most often mentioned there are few diverse candidates available to fill jobs and a lack of qualified candidates in a field that is already not diverse (11 out of 26; 42%), and that skills and talent are more important (4 out of 26; 15%). An additional 4 out of the 26 (15%) respondents reported that their organization had no challenge or issue when hiring a diverse workforce.

Likelihood of organization remaining in Canada in next five years

Q20 – How likely or unlikely is your organization to remain in Canada in the next five years?

Likelihood of remaining in Canada

Likelihood	2026-03 (n=41)	2024-03 (n=66)
Likely	70.7%	71.2%
Somewhat likely	22.0%	13.6%
Somewhat unlikely	2.4%	4.5%
Unlikely	4.9%	1.5%
Unsure	-	9.1%

Base: Individuals in industry or non-profits in the quantum sector, n=41

Filling positions requiring quantum science and technology background

Q21 – In the past six months, has your organization tried to fill positions for which a quantum science and technology background is important?

Tried to fill position in last six months

Tried to fill position	2026-03 (n=40)	2024-03 (n=65)
Yes	65.0%	69.2%
No	32.5%	26.2%
Unsure	2.5%	4.6%

Base: Individuals in industry or non-profits in the quantum sector, n=40

Q22 – [IF YES TO Q21] Where was your organization's search mainly conducted? [SELECT ALL THAT APPLY]

Primary location of search

Location	2026-03 (n=26)*	2024-03 (n=45)
Domestic (in Canada)	26 out of 26 (100%)	88.9%
USA	11 out of 26 (42%)	44.4%
Europe	7 out of 26 (27%)	40.0%
Asia	2 out of 26 (8%)	13.3%
Global	-	4.4%

*NOTE: Given that the size of the sample is less than n=30 respondents, a number of cases is reported in addition to percentages as the percentages are not statistically reliable. Base: Individuals in industry or non-profits in the quantum sector, n=26 respondents whose organization has tried to fill a position in the last six months, based on multiple mentions

Q23 – [IF YES TO Q21] Were there any qualified Canadian candidates that met your organization's needs?

Qualified Canadian candidates meeting needs of organization

Qualified Canadian candidates	2026-03 (n=26)*	2024-03 (n=44)
Yes	22 out of 26 (85%)	61.4%
No	2 out of 26 (8%)	25.0%
Unsure	2 out of 26 (8%)	13.6%

**NOTE: Given that the size of the sample is less than n=30 respondents, a number of cases is reported in addition to percentages as the percentages are not statistically reliable. Base: Individuals in industry or non-profits in the quantum sector, n=26 respondents whose organization has tried to fill a position in the last six months*

Q24 – [IF YES TO Q21] What recruiting tools were the most helpful for your organization to find qualified candidates?
[SELECT ALL THAT APPLY]

Effective recruiting tools used in search

Tools	2026-03 (n=26)	2024-03 (n=45)
Social media [LinkedIn]	15 out of 26 (58%)	64.4%
[TWEAKED] Job posting websites [Quantum Industry Canada job board, monster.ca, Indeed, etc.]	12 out of 26 (46%)	37.8%
Recruiting agency	6 out of 26 (23%)	26.7%
Personal network/ Personal connection	4 out of 26 (15%)	15.6%
Internal recruiters	3 out of 26 (12%)	4.4%
Word of mouth	1 out of 26 (4%)	2.2%
Direct advertising	1 out of 26 (4%)	-
Research organization [MITACS]	-	2.2%
Online research	-	2.2%
Our website	-	2.2%
Unsure	1 out of 26 (4%)	6.7%

**NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as the small sample sizes the percentages are not statistically reliable. Base: Individuals in industry or non-profits in the quantum sector, n=26 respondents whose organization has tried to fill a position in the last six months, based on multiple mentions*

Q25 – [IF YES TO Q21] What was the result of the hiring process? [select one]

Result of hiring process

Result	2026-03 (n=26)*	2024-03 (n=45)
My organization filled some of the positions we were hiring	14 out of 26 (54%)	42.2%
My organization filled all of the positions we were hiring	8 out of 26 (31%)	22.2%
The process is still ongoing	4 out of 26 (15%)	22.2%
My organization did not fill any of the positions we were hiring	-	8.9%
Unsure	-	4.4%

**NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as the small sample sizes the percentages are not statistically reliable. Base: Individuals in industry or non-profits in the quantum sector, n=26 respondents whose organization has tried to fill a position in the last six months.*

Q26 – [IF YES TO Q21] What was the main barrier, if any, to hiring someone to work at your organization?
[RANDOMIZE][select one]

Main barrier to hiring

Barrier	2026-03 (n=26)*	2024-03 (n=45)
Lack of qualified candidates	11 out of 26 (42%)	35.6%
Candidate expectations (e.g., salary, benefits)	6 out of 26 (23%)	26.7%
Immigration barriers	3 out of 26 (12%)	22.2%
Candidates unwilling to relocate	3 out of 26 (12%)	6.7%
Lack of money to hire candidates	1 out of 26 (4%)	-
Unsure	2 out of 26 (8%)	6.7%
None	-	2.2%

**NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as the small sample sizes the percentages are not statistically reliable. Base: Individuals in industry or non-profits in the quantum sector, n=26 respondents whose organization has tried to fill a position in the last six months.*

Q27 – In the next six months, how likely or unlikely is your organization to hire people for positions where a quantum science and technology background is important?

Likelihood of hiring in the next six months

Likelihood	2026-03 (n=41)	2024-03 (n=66)
Likely	53.7%	60.6%
Somewhat likely	24.4%	18.2%
Somewhat unlikely	19.5%	9.1%
Unlikely	2.4%	9.1%
Unsure	-	3.0%

Base: Individuals in industry or non-profits in the quantum sector, n=41

Shortage of skilled people in quantum technologies in Canada

Q28 – From the list below, please identify areas of quantum technologies for which there is a shortage of skilled people in Canada. [select all that apply] [RANDOMIZE]

Area(s) with shortage of skilled people in Canada

Area	2026-03 (n=41)	2024-03 (n=66)
Quantum sensors	51.2%	43.9%
Quantum computing hardware	36.6%	48.5%
Quantum software	29.3%	45.5%
Quantum communications and cryptography	26.8%	47.0%
Quantum materials	26.8%	33.3%
Other	17.1%	-
Unsure	17.1%	15.2%
None of the above	4.9%	-
Engineering/Technology	-	7.6%
Market research/product development	-	4.5%
Cryogenics	-	3.0%
Biology	-	1.5%

Base: Individuals in industry or non-profits in the quantum sector, n=41, based on multiple mentions

Representation of underrepresented groups in organization workforce

Q29 – Which of the following groups, if any, are represented in your organization's workforce? [RANDOMIZE]

Groups in organization's workforce

Group	2026-03 (n=41)	2024-03 (n=66)
Women	85.4%	86.2%
Racialized persons [persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour]	73.2%	72.3%
2SLGBTQIA+ community	43.9%	49.2%
Persons with disabilities	9.8%	27.7%
Indigenous Peoples	4.9%	16.9%
None of the above	2.4%	6.2%
Unsure	9.8%	4.6%

Base: Individuals in industry or non-profits in the quantum sector, n=41, based on multiple mentions.

Q30 – What is the biggest challenge, if any, for your organization when hiring a more diverse workforce? [OPEN]

Challenges to hiring a more diverse workforce

Challenges	2026-03 (n=24)*	2024-03 (n=42)
Few diverse candidates available to fill jobs/lack of qualified candidates/field is not diverse	11 out of 24 (46%)	42.9%
Skills/talent and experience are more important	4 out of 24 (17%)	19.0%
Not a challenge/no issues	4 out of 24 (17%)	7.1%
Connecting to Indigenous communities/finding Indigenous candidates	1 out of 24 (4%)	4.8%
Money	1 out of 24 (4%)	4.8%
Other	1 out of 24 (4%)	4.8%
No comment	1 out of 24 (4%)	-
Immigration concerns (speed of arrival)	-	4.8%
Diversity is not always visible/we do not ask (ex. Sexual orientation)	-	4.8%
We have a strong DEI policy/ensure we abide by it	-	4.8%
Unsure	-	2.4%

*NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as due to the small sample sizes the percentages are not statistically reliable Base: Individuals in industry or non-profits in the quantum sector, n=24

Section 2 – Quantum Academics

A. General questions

This section included general questions related to the role, tenure, and demographics of academic respondents.

Academic respondents were located in Ontario (40%; 33% in 2024), followed by the West (34%; 27% in the 2024 wave) and Quebec (20%; 38% in 2024), with 4% from Atlantic Canada (2% in the 2024 wave).

Regarding underrepresented groups included in the workforce of their department, respondents most often report that women are represented in their department (71%; 58% in 2024), followed by racialized persons (69%; 42% in 2024), 2SLGBTQIA+ community members (49%; 33% in 2024), and persons with disabilities (36%; 22% in 2024), while 16% report none of these groups are represented (27% in 2024).

In terms of their role within academia, most respondents are professors (87%), with no researchers or graduate students partaking in the survey this wave. They have mostly been in the field of quantum technologies for 20 years or more (64%; 69% in 2024).

Role within academia

Q31 – What is your role within academia?

Role within academia

Role	2026-03 (n=45)	2024-03 (n=46)
Professor (include Associate, Assistant, Professor)	86.7%	82.6%
Researcher	-	4.3%
Graduate student	-	2.2%
Other	13.3%	10.9%

Base: Individuals in academia in the quantum sector, n=45

Time working or studying in the field

Q33 – How many years have you been working/studying in this field?

Number of years spent in the field

Years	2026-03 (n=44)	2024-03 (n=45)
Less than 5 years	6.8%	-
5 to 9 years	4.5%	11.1%
10 to 14 years	15.9%	11.1%
15 to 19 years	9.1%	8.9%
20 years or more	63.6%	68.9%

Base: Individuals in academia in the quantum sector, n=44

Underrepresented groups in department workforce

Q34 – Which of the following groups, if any, are represented in your department's workforce? [RANDOMIZE]

Groups in department's workforce

Group	2026-03 (n=45)	2024-03 (n=45)
Women	71.1%	57.8%
Racialized persons [persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour]	68.9%	42.2%
2SLGBTQIA+ community	48.9%	33.3%
Persons with disabilities	35.6%	22.2%
Indigenous Peoples	22.2%	6.7%
None of the above	15.6%	26.7%
Unsure	6.7%	13.3%

Base: Individuals in academia in the quantum sector, n=45, based on multiple mentions.

B. Research

Similar to results from 2024, respondents in the academia stream most often report conducting research and development related to quantum sensors (51%; 48% in 2024), quantum communications and cryptography (42%; 44% in 2024), quantum computing hardware (47%; 41% in 2024) and quantum materials (47%; 37% in 2024).

Regarding collaborations, academic respondents most often report collaborating with universities and colleges in other countries (93%; 78% in 2024), followed by universities and colleges in Canada (91%; 87% in 2024), companies located in Canada (80%; 67% in 2024) and Canadian research institutes such as the Institute for Quantum Computing (IQC) (62%; 61% in 2024). None of the 45 respondents reported that they do not collaborate with any of these entities.

Academic respondents rate collaboration with universities and colleges in Canada as the most important type of collaboration (mean score of 8.6 out of 10; 8.5 in 2024), followed by universities and colleges in other countries (mean of 8.5; 7.9 in 2024), companies located in Canada (mean of 7.7; 7.4 in 2024), Canadian Federal government laboratories such as the National Research Council (NRC) (mean score of 7.1; 6.4 in 2024) and Canadian research institutes such as the Institute for Quantum Computing (IQC) (mean of 7.1; 7.4 in 2024).

The main benefits to these collaborations, according to respondents, are the advancement of knowledge, sharing new ideas, and enabling breakthroughs (43%; 35% in 2024) and complementary and specialized expertise (26%; 24% in 2024). Meanwhile, those who do collaborate said the main outputs from these collaborations are ongoing research collaboration (100%; 93% in 2024), a publication (98%; 84% on 2024), a conference presentation (91%; 68% in 2024) and an expanded network (73%; 66% last wave).

Conducting research and development in quantum technologies

Q35 – In which areas do you conduct research and development in quantum technologies? [select all that apply][RANDOMIZE]

Area(s) of research and development

Area	2026-03 (n=45)	2024-03 (n=46)
Quantum sensors	51.1%	47.8%
Quantum computing hardware	46.7%	41.3%
Quantum materials	46.7%	37.0%
Quantum communications and cryptography	42.2%	43.5%
Quantum software	31.1%	32.6%
Quantum Foundations	6.7%	-
Math/Computer Science	2.2%	-
Photonics	2.2%	-
Not Applicable/I do not conduct research	2.2%	2.2%
Quantum information and theories	-	4.3%
Economics	-	2.2%
Quantum Simulation	-	2.2%
Quantum Algorithms	-	2.2%

Base: Individuals in academia in the quantum sector, n=45, based on multiple mentions.

Q36 – What department in the university/college are you with?

Department at university/college

Area	2026-03 (n=45)	2024-03 (n=46)
Physics	48.9%	41.3%
Engineering	13.3%	15.2%
Mathematics	11.1%	15.2%
Quantum Matter	6.7%	-
Computer Science	4.4%	4.3%
Research Institute*/Central	2.2%	8.7%
Chemistry	2.2%	6.5%
Other	11.1%	-
Administration/Policy	-	8.7%

Base: Individuals in academia in the quantum sector, n=45

*Updated from Institute in 2024 wave

Collaborations with various entities

Q37 – [TWEAKED] In quantum research, do you collaborate with the following entities? [RANDOMIZE][SELECT ALL THAT APPLY]

Collaborating with entities

Type of entity	2026-03 (n=45)	2024-03 (n=46)
Universities/colleges in other countries	93.3%	78.3%
Universities/colleges in Canada	91.1%	87.0%
Companies located in Canada	80.0%	67.4%
[TWEAKED] Canadian research institutes such as the Institute for Quantum Computing (IQC)	62.2%	60.9%
Companies located outside of Canada	57.8%	47.8%
[TWEAKED] Canadian Federal government laboratories such as the National Research Council (NRC)	44.4%	47.8%
Government laboratories or international research institutes in other countries, such as the U.S. Department of Energy	40.0%	43.5%
None of the above	-	4.3%

Base: Individuals in academia in the quantum sector, n=45, based on multiple mentions.

Importance of collaborating with various entities

Q38-44 – [TWEAKED] On a scale from 0 to 10, where 0 is not at all important and 10 is very important, how important is it for you to collaborate with the following entities to advance your research interests? [RANDOMIZE]

Importance of collaborations

Type of entity (n=44)	Not important (0-3)	Neutral (4-6)	Very Important (7-10)	2026-03 Mean (n=45)	2024-03 Mean (n=44)
Universities/colleges in Canada	6.7%	4.4%	88.9%	8.6	8.5
Universities/colleges in other countries	8.9%	6.7%	84.4%	8.5	7.9
Companies located in Canada	11.1%	15.6%	73.3%	7.7	7.4
[TWEAKED] Canadian Federal government laboratories such as the National Research Council (NRC).	15.6%	17.8%	64.4%	7.1	6.4
[TWEAKED] Canadian research institutes such as the Institute for Quantum Computing (IQC)	17.8%	17.8%	62.2%	7.1	7.4
Government laboratories and international research institutes in other countries, such as the U.S. Department of Energy	22.7%	38.6%	38.6%	5.8	6.8
Companies located outside of Canada	20.5%	36.4%	38.6%	5.8	5.8

Base: Individuals in academia in the quantum sector, n=45

Benefits and output from collaboration

Q45 – [IF COLLABORATES WITH ANY ORG IN Q36] What is the main benefit for you, if any, of these collaborations? [OPEN]

Main benefits to collaboration

Benefit	2026-03 (n=35)	2024-03 (n=37)
Advancement of knowledge/sharing new ideas/enabling breakthroughs	42.9%	35.1%
Complementary/specialized expertise	25.7%	24.3%
Bigger scale/cutting edge research/bigger source of sample	5.7%	16.2%
Access to funding	8.6%	8.1%
Access to technology	8.6%	8.1%
Publications/recognition	2.9%	5.4%
Other	2.9%	-
No Comment	2.9%	-
Ownership of IP	-	2.7%

Base: Individuals in academia in the quantum sector, n=35 respondents who collaborates with at least one type of entity.

Q46 – [IF COLLABORATES WITH ANY ORG IN Q36] What has been the main output of these collaborations? [SELECT ALL THAT APPLY] [RANDOMIZE]

Main output from collaborations

Output	2026-03 (n=45)	2024-03 (n=44)
Ongoing research collaboration	100.0%	93.2%
Publication	97.8%	84.1%
Conference Presentation	91.1%	68.2%
Expanded network	73.3%	65.9%
Patent	37.8%	25.0%
Prototype	26.7%	18.2%
Market-ready product or service	17.8%	15.9%
Training/student exchange	-	4.5%
Other	-	2.3%
Unsure	-	2.3%

Base: Individuals in academia in the quantum sector, n=45 respondents who collaborates with at least one type of entity, based on multiple mentions

Barriers to collaboration

Q47 – [IF DOES NOT COLLABORATE WITH ANY ORG IN Q36] What is the main barrier, if any, preventing you from collaborating? [OPEN]

NOTE: This data has been suppressed due as all respondents reporting collaboration.

C. Talent

Eighty-seven percent of academic respondents say they are likely (69%; 80% in 2024) or somewhat likely (18%; 11% in 2024) to remain in Canada in the next five years to pursue their research, mentioning funding opportunities (mean score of 9.4 out of 10) and quality of life (mean of 8.9) as the top factors that are most important when choosing where to conduct their research.

A majority of academic respondents (77%) report their department has tried to hire a new faculty member in quantum in the past six months. With almost half reporting that they filled some (26%) or all (24%) of the positions they were hiring for. An additional 41 percent reported that the process is still ongoing.

In terms of challenges related to hiring a more diverse workforce, the top response was there are few diverse candidates available to fill jobs and a lack of applications (8 out of 27 respondents), while 5 out of 27 respondents mentioned salary as the biggest challenges related to hiring a more diverse workforce.

Likelihood of remaining in Canada in next five years to pursue research

Q48 – How likely or unlikely are you to remain in Canada in the next five years to pursue your research?

Likelihood of remaining in Canada

Likelihood	2026-03 (n=45)	2024-03 (n=45)
Likely	68.9%	80.0%
Somewhat likely	17.8%	11.1%
Somewhat unlikely	-	4.4%
Unlikely	4.4%	-
Unsure	8.9%	4.4%

Base: Individuals in academia in the quantum sector, n=45

Importance of factors when deciding where to conduct research

Q49-56 – On a scale from 0 to 10, where 0 is not at all important and 10 is very important, how important or not important are the following factors to you when choosing where to conduct your research? [RANDOMIZE]

Importance of factors

	Not important (0-3)	Neutral (4-6)	Very Important (7-10)	2026-03 Mean (n=43)	2024-03 Mean (n=45)
Funding opportunities	-	2.3%	97.7%	9.4	8.9
Quality of life	-	4.8%	95.2%	8.9	8.8
Strength of the local quantum community	-	7.0%	93.0%	8.6	8.2
Professional connections	-	4.7%	95.3%	8.5	8.1
Reputation of institution	2.3%	14.0%	83.7%	8.0	8.3
Salary	-	20.9%	79.1%	7.8	7.8
National Moonshot programs	21.4%	23.8%	45.2%	6.2	6.1

Base: Individuals in academia in the quantum sector, n=45

Hiring new faculty member in quantum

Q57 – Has your department attempted to hire a new faculty member in quantum in the past six months?

Tried to fill position in last six months

Tried to fill position	2026-03 (n=44)	2024-03 (n=46)
Yes	77.3%	56.5%
No	22.7%	39.1%
Unsure	-	4.3%

Base: Individuals in academia in the quantum sector, n=44

Result of hiring process

Q58 – [IF YES IN Q57] What was the result of the hiring process? [select one]

	2026-03 (n=34)	2024-03 (n=26)*
The process is still ongoing	41.2%	14 out of 26 (54%)
My department filled some of the positions we were hiring	26.5%	9 out of 26 (35%)
My department filled all of the positions we were hiring	23.5%	2 out of 26 (8%)
My department did not fill any of the positions we were hiring	8.8%	-
Unsure	-	1 out of 26 (4%)

**NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as due to the small sample sizes the percentages are not statistically reliable Base: Individuals in academia in the quantum sector, n=34*

Main barrier to hiring

Q59 – [IF YES IN Q57] What was the main barrier, if any, to hiring a new faculty member to work in your department? [RANDOMIZE][select one]

	2026-03 (n=33)	2024-03 (n=9)*
Candidate expectations (e.g. salary, benefits)	42.4%	1 out of 9 (11%)
Lack of qualified candidates	18.2%	-
Candidates unwilling to relocate	18.2%	-
Unsure	9.1%	-
Hiring freeze	3.0%	-
In process	3.0%	-
Other	6.1%	-
International/high competition	-	5 out of 9 (56%)
Inefficient hiring process	-	1 out of 9 (11%)
Cost of living/housing in the area	-	1 out of 9 (11%)
None/no barriers	-	1 out of 9 (11%)

**NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as due to the small sample sizes the percentages are not statistically reliable Base: Individuals in academia in the quantum sector, n=33*

Q60 – What is the biggest challenge, if any, for your organization when hiring a more diverse workforce? [OPEN]

Challenges to hiring a more diverse workforce

Challenges	2026-03 (n=27)*	2024-03 (n=32)
Few diverse candidates available to fill jobs/lack of applications	8 out of 27 (30%)	40.6%
Salary	5 out of 27 (19%)	3.1%
Lack of qualified candidates/not as many people in the field	3 out of 27 (11%)	6.3%
No strategy in place	3 out of 27 (11%)	3.1%
Competition from other fields	1 out of 27 (4%)	12.5%
No issue	1 out of 27 (4%)	9.4%
Other	5 out of 27 (19%)	-
Toxic work environment, colleagues	-	6.3%
Lack of diversity in hiring committee	-	12.5%
Lack of capacity for training	-	3.1%
Not a desirable location	-	3.1%

Base: Individuals in academia in the quantum sector, n=27

*NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as due to the small sample sizes the percentages are not statistically reliable *Removed no comment

D. Academia commercialization

Much like the 2024 wave, academic respondents were more likely to report engaging in both fundamental and applied research (50%; 48% in 2024) than mainly on fundamental (41%; 35% in 2024) or applied (9%; 17% in 2024) by themselves. Two thirds of respondents reported they do not work at a quantum company (67%; 57% in 2024), while one in fifth report they work at one as a consultant (20%). Just over one in ten reported that they work as an executive or board member (13%; 26% in 2024) at a quantum company.

Q61 – Are you primarily engaged in fundamental or applied research?

Type of research engaged in

Type of research	2026-03 (n=44)	2024-03 (n=46)
Both fundamental and applied research	50.0%	47.8%
Fundamental research	40.9%	34.8%
Applied research	9.1%	17.4%

Base: Individuals in academia in the quantum sector, n=44

Q62 – In addition to your primary work in academia, do you also currently play any role for a quantum company? [select one]

Role in quantum company

Role	2026-03 (n=45)	2024-03 (n=45)
No, I do not work at a quantum company	66.7%	56.5%
Yes, I work at a quantum company as a consultant	20.0%	15.2%
Yes, I work at a quantum company as an Executive or Board Member	13.3%	26.1%
Yes, I work at a quantum company as an employee	-	2.2%

Base: Individuals in academia in the quantum sector, n=45

Section 3 – Quantum business and academia

A. Commercialization of technologies

Over half of respondents in both industry and academic streams report they have filed a patent related to quantum technology (67%; 54% in 2024). Additionally, four in five respondents report they have engaged potential end users of their product and service within the past year (80%; 78% in the 2024 wave), with industry respondents more likely to report having done this (98%; 88% in the 2024 wave) than academic respondents (64%; also 64% in the 2024 wave).

When asked about the level of interest potential end users have in adopting quantum technologies, about nine out of every ten respondents say they are interested (65%; 63% in the 2024 wave) or somewhat interested (26%; 34% in the 2024 wave). Despite this interest, respondents are a bit less likely to say end users are comfortable (29%; 20% in the 2024 wave) or somewhat comfortable (38%; 49% in the 2024 wave) with adopting quantum products or services.

Asked about barriers to end users adopting quantum solutions, industry respondents most often mentioned a lack of knowledge and understanding of the technology (30%; 20% in the 2024 wave), it being too early, and the work or technology not being ready yet (18%; 20% in the 2024 wave), and that use cases are still being proven and not adopted widely yet (15%; 21% in the 2024 wave). When asked about barriers preventing the commercialization of their research, academic respondents also often mention that it is too early and the work or technology is not ready yet (21%; 27% in the 2024 wave). Another 21 percent of academic respondents report that the commercialization of their research is not applicable (nine percent in the 2024 wave).

Filed a patent related to quantum technologies

Q63 – Have you/your organization ever filed a patent related to quantum technologies?

Previously filed a patent related to quantum technology

	Total		Academia		Industry/non-profit	
Filed patent	2026-03 (n=86)	2024-03 (n=112)	2026-03 (n=45)	2024-03 (n=46)	2026-03 (n=41)	2024-03 (n=66)
Yes	67.4%	54.5%	77.8%	56.5%	56.1%	53.0%
No	32.6%	45.5%	22.2%	43.5%	43.9%	47.0%

Base: Individuals in industry/non-profit or academia in the quantum sector, n=86

Engaging end users with adopting quantum technologies

Q64 – Have you/your organization engaged with potential end users of your product or service within the past year?

Previously engaged potential end users

	Total		Academia		Industry/non-profit	
Engaged with end users	2026-03 (n=86)	2024-03 (n=110)	2026-03 (n=45)	2024-03 (n=45)	2026-03 (n=41)	2024-03 (n=65)
Yes	80.2%	78.2%	64.4%	64.4%	97.6%	87.7%
No	19.8%	21.8%	35.6%	35.6%	2.4%	12.3%

Base: Individuals in industry/non-profit or academia in the quantum sector, n=86

Q65 – How interested or not interested are potential end users in adopting quantum technologies?

Interest in potential end users to adopt quantum technologies

	Total		Academia		Industry/non-profit	
Level of interest	2026-03 (n=69)	2024-03 (n=86)	2026-03 (n=29)*	2024-03 (n=29)*	2026-03 (n=40)	2024-03 (n=57)
Interested	65.2%	62.8%	20 out of 29 (69%)	14 out of 29 (48%)	62.5%	70.2%
Somewhat interested	26.1%	33.7%	7 out of 29 (24%)	12 out of 29 (41%)	27.5%	29.8%
Somewhat not interested	7.2%	1.2%	1 out of 29 (3%)	1 out of 29 (3%)	10.0%	-
Not interested	1.4%	-	1 out of 29 (3%)	-	-	-
Unsure	-	2.3%	-	2 out of 29 (7%)	-	--

**NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as the small sample sizes the percentages are not statistically reliable. Base: Individuals in industry/non-profit or academia in the quantum sector, n=69 respondents who have engaged with potential end users in the past year.*

Q66 – How comfortable or not comfortable are potential end users with adopting quantum products or services?

Comfort of potential end users with adopting quantum technologies

	Total		Academia		Industry/non-profit	
Level of comfort	2026-03 (n=69)	2024-03 (n=85)	2026-03 (n=29)*	2024-03 (n=29)*	2026-03 (n=40)	2024-03 (n=56)
Comfortable	29.0%	20.0%	10 out of 29 (34%)	1 out of 29 (3%)	25.0%	28.6%
Somewhat comfortable	37.7%	49.4%	11 out of 29 (38%)	15 out of 29 (52%)	37.5%	48.2%
Somewhat not comfortable	26.1%	14.1%	4 out of 29 (14%)	5 out of 29 (17%)	35.0%	12.5%
Not comfortable	2.9%	5.9%	1 out of 29 (3%)	1 out of 29 (3%)	2.5%	7.1%
I don't know	4.3%	10.6%	3 out of 29 (10%)	7 out of 29 (24%)	-	3.6%

**NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as the small sample sizes the percentages are not statistically reliable. Base: Individuals in industry/non-profit or academia in the quantum sector, n=69 respondents who have engaged with potential end users in the past year.*

Q67 – [ASK INDUSTRY ONLY] What is the main barrier, if any, preventing end users from adopting quantum solutions?
[OPEN]

Barriers to end users adopting quantum solutions

Barrier	2026-03 Industry/non-profit (n=33)	2024-03 Industry/non-profit (n=56)
Lack of knowledge of the technology/lack of understanding	30.3%	19.6%
It is too early/work/technology isn't ready yet	18.2%	19.6%
Use cases still being proven/not adopted widely yet	15.2%	21.4%
Costs/price of technology	9.1%	8.9%
None/no barriers	6.1%	3.6%
Cannot currently compete with classical solutions	6.1%	3.6%
Risk aversion	3.0%	7.1%
No urgency/incentive for it	3.0%	5.4%
Lack of funding	3.0%	3.6%
Other	6.1%	7.1%

Base: Individuals in industry/non-profit in the quantum sector, n=33 respondents

Q68 – [ASK ACADEMICS ONLY] What is the main barrier, if any, preventing the commercialization of your research? [OPEN]

Barriers preventing commercialization of research

Barrier	2026-03 Academics (n=33)	2024-03 Academics (n=33)
It is too early/work/technology isn't ready yet	21.2%	27.3%
Not applicable/doing fundamental research	21.2%	9.1%
Industry is not ready/lack of demand	12.1%	6.1%
Lack of capital	9.1%	6.1%
Lack of understanding/confusion on what quantum technology is/how to use it	6.1%	6.1%
Need support for IP processes	6.1%	3.0%
Difficult to translate academic advances into deployable technology	6.1%	3.0%
Issues within my organization	6.1%	3.0%
Other	6.1%	3.0%
Not interested in commercializing it	3.0%	18.2%
Need additional equipment/technology	3.0%	3.0%
Lack of standardization	-	3.0%
Need policy pressure to push adoption	-	3.0%
The competition	-	3.0%
Unsure	-	3.0%

Base: Individuals in academia in the quantum sector, n=33 respondents

Q69 – Do you/does your organization have a market-ready quantum product or service?

Market-ready quantum product or service

	Total		Academia		Industry/non-profit	
Has product or service	2026-03 (n=85)	2024-03 (n=112)	2026-03 (n=44)	2024-03 (n=46)	2026-03 (n=41)	2024-03 (n=66)
Yes	45.9%	48.2%	31.8%	23.9%	61.0%	65.2%
No	41.2%	40.2%	45.5%	52.2%	36.6%	31.8%
I don't know	12.9%	11.6%	22.7%	23.9%	2.4%	3.0%

Base: Individuals in industry/non-profit or academia in the quantum sector, n=85 respondents.

Q70 - [NEW QUESTION IN 2026][IF YES TO Q69] If yes, which would be the main markets for your quantum product or service? [SELECT ALL THAT APPLY] [RANDOMIZE]

Location	2026-03 (n=39)
Domestic (Canada)	76.9%
United States	74.4%
Germany	51.3%
United Kingdom	46.2%
Japan	41.0%
South Korea	38.5%
France	35.9%
Netherlands	30.8%
Australia	25.6%
Denmark	17.9%
EU countries	12.8%
NATO	5.1%
Gulf/GCC	5.1%
China	2.6%
Taiwan	2.6%
ASEAN	2.6%
Chile	2.6%
Peru	2.6%
Unsure	10.3%

Base: Individuals in industry/non-profit or academia in the quantum sector who answered yes to Q69, n=39 respondents. based on multiple mentions

B. Awareness and use of federal programming

Overall respondents rate themselves as knowledgeable (77% score of 7-10; 71% in the 2024 wave) of how federal programming can support quantum research and development (mean of 7.6 out of 10; 7.4 out of 10 in the 2024 wave).

Prompting on awareness of federal programs supporting commercialization, industry and academic respondents were most likely to report having heard of NRC Challenge Programs (88%; 84% in the 2024 wave), followed by the NRC Industrial Research Assistance Program (IRAP) (87%; also 87% in the 2024 wave) and the Innovation for Defence Excellence and Security (IDEaS) (83%; 81% in the 2024 wave). Among those aware of the programs, they were most likely to report having applied for and received funding from Innovative Solutions Canada (ISC) (46%; 36% in the 2024 wave), IRAP (36%; 37% in the 2024 wave), and IDEaS (30%; 28% in the 2024 wave). Industry and academic respondents noted that the programs are good or useful or that they had a great experience (18%; 5% in the 2024 wave), that there are too many requirements, and they should be relaxed (16%; 10% in the 2024 wave), and that the application or approval process is too long or complex (11%; 20% in the 2024 wave).

When it came to federal programs supporting research, industry and academic respondents were most likely to have heard of the NSERC Alliance Quantum stream (87%; also 87% in the 2024 wave), followed by the Canadian Institute for Advanced Research (CIFAR) (82%; 67% in the 2024 wave). They were comparatively less likely to have heard of the Bank of Canada PIVOT program (7%; 12% in the 2024 wave). Forty-five percent of industry and academic respondents who have heard of the NSERC Alliance Quantum program report they applied for and received funding (thirty-two percent in the 2024 wave). Twelve percent report they applied but did not receive the funding (six percent in the 2024 wave). About one in five industry and academic respondents who have heard of CIFAR report they applied for and received funding (19%; 20% in the 2024 wave), while six percent report that they applied for but did not receive funding (three percent in the 2024 wave). Seven in ten industry and academic respondents who have heard of CIFAR report they did not apply for or receive funding (70%; 66% in the 2024 wave). Five of the six (83%) industry and academic respondents who have heard of the Bank of Canada Pivot Program report they did not apply or receive funding (10 out of 13; 77% in the 2024 wave). When asked for comments on their engagements with these federal programs, four out of 29 (14%) industry and academic respondents each mentioned the Alliance program does not fund companies or the private sector, that they had a positive experience with Alliance, or a need for flexible funding calls.

For federal programs that support talent, nearly all industry and academic respondents report having heard of the Mitacs program (99%; 98% in the 2024 wave), while four in five had heard of NSERC CREATE (80%; 77% in the 2024 wave). Seventy-one percent of industry and academic respondents who have heard of Mitacs report they have applied for and received funding (fifty-nine percent in the 2024 wave), while two in five have applied for and received funding from NSERC Create (41%; 16% report they applied but did not receive funding). Eleven out of 25 industry and academic respondents commented that the federal programs supporting talents are good programs and that they have applied successfully (25% in the 2024 wave). Five out of 25 (20%) noted that the funding is not enough to be worth it/need more programs funded (16% in the 2024 wave). Three out of 25 (12%) each noted that the programs do not apply to industry and that they must go through academia to apply (25% in the 2024 wave) and another three out of 25 (12%) noted that programs are difficult to apply/too many requirements (25% noted this in the 2024 wave).

Knowledge of federal programming in support of quantum research and development

Q71 – On a scale from 0 to 10, where 0 is not knowledgeable at all and 10 is very knowledgeable, to what extent are you knowledgeable of how federal programming can support quantum research and development?

Level of knowledge of federal programming

	Total		Academia		Industry/non-profit	
Level of knowledge (score out of 10)	2026-03 (n=86)	2024-03 (n=112)	2026-03 (n=45)	2024-03 (n=46)	2026-03 (n=41)	2024-03 (n=66)
Mean	7.6	7.4	7.6	7.6	7.6	7.2
Not knowledgeable (0-3)	7.0%	7.1%	8.9%	8.7%	4.9%	6.1%
Average (4-6)	16.3%	21.4%	13.3%	13.0%	19.5%	27.3%
Knowledgeable (7-10)	76.7%	71.4%	77.8%	78.3%	75.6%	66.7%

Base: Individuals in industry/non-profit or academia in the quantum sector, n=86 respondents.

Awareness and use of federal programs supporting commercialization

Q72-83 Have you heard or not heard of the following federal programs that support commercialization? [RANDOMIZE]

Awareness of federal programs supporting commercialization

	2026-03 (n=86)		2024-03 (n=112)	
Programs	Heard	Not heard	Heard	Not heard
NRC Challenge Programs	88.4%	11.6%	83.9%	16.1%
[TWEAKED] NRC Industrial Research Assistance Program (IRAP)	87.1%	12.9%	87.4%	12.6%
Innovation for Defence Excellence and Security (IDEaS)	82.6%	17.4%	81.1%	18.9%
[TWEAKED] Business Development Bank of Canada (BDC) Deep Tech Fund	67.1%	32.9%	64.9%	35.1%
[TWEAKED] Strategic Response Fund (SRF) – formerly Strategic Innovation Fund (SIF)	66.3%	33.7%	75.0%	25.0%
[TWEAKED] Innovative Solutions Canada (ISC)	56.6%	43.4%	64.9%	35.1%
[NEW] Canada Economic Development for Quebec Regions	45.0%	55.0%	-	-
[NEW] Federal Economic Development Agency for Southern Ontario	43.2%	56.8%	-	-
[NEW] Pacific Economic Development Canada (PacifiCan)	42.9%	57.1%	-	-
Global Innovation Clusters	38.8%	61.3%	40.9%	59.1%
[NEW] Prairies Economic Development Canada	37.3%	62.7%	-	-
Regional Development Agency (Canada Economic Develop for Quebec Regions, Federal Economics Development Agency for Southern Ontario, Prairies Economic Development Canada, Pacific Economic Development Canada)*	-	-	75.9%	24.1%

Base: Individuals in industry/non-profit or academia in the quantum sector, n=86 respondents.

*Response was split up into four new categories in 2026 wave

Q84-95 – Have you/your company ever applied for or received assistance (including grants, contributions, or contracts) from any of the following programs that support commercialization? [SHOW ONES HEARD OF IN Q72-83]

Use of federal programming supporting commercialization

Programs	Yes, applied for but did not receive assistance/ Funding		Yes, applied for and received assistance/ Funding		Yes, applied for, but decision is pending	
	2026-03	2024-03	2026-03	2024-03	2026-03	2024-03
[TWEAKED] NRC Industrial Research Assistance Program (IRAP) (n=72)	6.9%	8.4%	36.1%	36.8%	2.8%	5.3%
NRC Challenge Programs (n=72)	15.3%	13.0%	27.8%	26.1%	5.6%	7.6%
Innovation for Defence Excellence and Security (IDEaS) (n=69)	20.3%	19.1%	30.4%	28.1%	5.8%	2.2%
Regional Development Agency (n=0)**	-	4.8%	-	30.1%	-	9.6%
Strategic Innovation Fund (SIF) (n=54)	1.9%	9.6%	14.8%	18.1%	1.9%	3.6%
[TWEAKED] Business Development Bank of Canada (BDC) Deep Tech Fund (n=56)	12.5%	15.5%	8.9%	5.6%	-	-
[TWEAKED] Innovative Solutions Canada (ISC) (n=46)	8.7%	13.9%	45.7%	36.1%	-	5.6%
Global Innovation Clusters (n=30)	10.0%	2.3%	6.7%	20.5%	-	4.5%
[NEW] Canada Economic Development for Quebec Regions (n=36)	2.8%	-	16.7%	-	-	-
[NEW] Federal Economic Development Agency for Southern Ontario (n=35)	8.6%	-	14.3%	-	8.6%	-
[NEW] Prairies Economic Development Canada (n=29)*	1 out of 29	-	5 out of 29	-	1 out of 29	-
[NEW] Pacific Economic Development Canada (PacifiCan) (n=35)	8.6%	-	17.1%	-	-	-

Base: Individuals in industry/non-profit or academia in the quantum sector, n=72 respondents who have heard of at least one of the programs

*NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as due to the small sample sizes the percentages are not statistically reliable **Response was split up into four new categories in 2026 wave

Q84-95 – Have you/your company ever applied for or received assistance (including grants, contributions, or contracts) from any of the following programs that support commercialization? [SHOW ONES HEARD OF IN Q72-83]

Use of federal programming supporting commercialization

	No did not apply for or receive assistance/ Funding		Unsure	
Programs	2026-03	2024-03	2026-03	2024-03
[TWEAKED] NRC Industrial Research Assistance Program (IRAP) (n=72)	48.6%	40.0%	5.6%	9.5%
NRC Challenge Programs (n=72)	38.9%	42.4%	12.5%	10.9%
Innovation for Defence Excellence and Security (IDEaS) (n=69)	37.7%	40.4%	5.8%	10.1%
Regional Development Agency (n=0)**	-	45.8%	-	9.6%
Strategic Innovation Fund (SIF) (n=54)	70.4%	60.2%	11.1%	8.4%
[TWEAKED] Business Development Bank of Canada (BDC) Deep Tech Fund (n=56)	71.4%	70.4%	7.1%	8.5%
[TWEAKED] Innovative Solutions Canada (ISC) (n=46)	41.3%	36.1%	4.3%	8.3%
Global Innovation Clusters (n=30)	73.3%	61.4%	10.0%	11.4%
[NEW] Canada Economic Development for Quebec Regions (n=36)	72.2%	-	8.3%	-
[NEW] Federal Economic Development Agency for Southern Ontario (n=35)	62.9%	-	5.7%	-
[NEW] Prairies Economic Development Canada (n=29)*	20 out of 29 (69%)	-	2 out of 29 (7%)	-
[NEW] Pacific Economic Development Canada (PacifiCan) (n=35)	71.4%	-	2.9%	-

Base: Individuals in industry/non-profit or academia in the quantum sector, n=72 respondents who have heard of at least one of the programs

*NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as due to the small sample sizes the percentages are not statistically reliable **Response was split up into four new categories in 2026 wave

Q96 – Do you have any specific comments on your engagements with any of these federal programs that support commercialization? [OPEN]

Comments on engagements with federal programs supporting commercialization

Comment	2026-03 (n=38)	2024-03 (n=59)
Programs are good/useful/great experience	18.4%	5.1%
Too many requirements/relax requirements	15.8%	10.2%
Application/approval process too long/complex	10.5%	20.3%
Canada has fallen behind/programs are not enough	10.5%	6.8%
We need more basic research/training/education	10.5%	3.4%
Strengthen early adoption programs	5.3%	5.1%
Less focus on commercialization	5.3%	3.4%
Not enough funding/scale too small	2.6%	8.5%
Evaluation is too subjective/evaluators lack understanding of quantum	2.6%	8.5%
Nothing/no	2.6%	5.1%
Other	7.9%	11.9%
No comment	5.3%	-
Not Sure	2.6%	-
Difficult to get funders to engage/commit to funding	-	5.1%
BDC is risk adverse/does not support non-hardware companies	-	3.4%
Technology isn't ready/not at that stage yet	-	3.4%

Base: Individuals in industry/non-profit or academia in the quantum sector, n=38 respondents.

Awareness and use of federal programs supporting research

Q97-100 – Have you heard or not heard of the following federal programs that support research?

Awareness of federal programs supporting research

	2026-03 (n=86)		2024-03 (n=112)	
Programs	Heard	Not heard	Heard	Not heard
NSERC Alliance Quantum	87.2%	12.8%	86.6%	13.4%
[TWEAKED] Canadian Institute for Advanced Research (CIFAR)	82.4%	17.6%	67.0%	33.0%
Bank of Canada PIVOT program	7.1%	92.9%	11.7%	88.3%

Base: Individuals in industry/non-profit or academia in the quantum sector, n=86 respondents.

Q101-104 – Have you/your company ever applied for or received assistance (including grants, contributions, or contracts) from any of the following federal programs that support research? [SHOW ONES HEARD OF IN Q97-100]

Use of federal programming supporting research

	Yes, applied for but did not receive assistance/ Funding		Yes, applied for and received assistance/ Funding		Yes, applied for, but decision is pending	
Programs	2026-03	2024-03	2026-03	2024-03	2026-03	2024-03
Bank of Canada PIVOT program (n=6)*	-	-	-	2 out of 13 (15%)	-	-
[TWEAKED] Canadian Institute for Advanced Research (CIFAR) (n=70)	5.7%	2.4%	18.6%	20.3%	-	-
NSERC Alliance Quantum (n=75)	12.0%	6.3%	45.3%	32.3%	2.7%	20.8%

*NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as the small sample sizes the percentages are not statistically reliable.

	No did not apply for or receive assistance/ Funding		Unsure	
Programs	2026-03	2024-03	2026-03	2024-03
Bank of Canada PIVOT program (n=6)*	5 out of 6 (83%)	10 out of 13 (77%)	1 out of 6 (17%)	1 out of 13 (8%)
[TWEAKED] Canadian Institute for Advanced Research (CIFAR) (n=70)	70.0%	66.2%	5.7%	10.8%
NSERC Alliance Quantum (n=75)	33.3%	34.4%	6.7%	6.3%

*NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as the small sample sizes the percentages are not statistically reliable. Base: Individuals in industry/non-profit or academia in the quantum sector, n=75 respondents who have heard of at least one of the programs.

Q105 – Do you have any specific comments on your engagements with any of these federal programs that support research?
[OPEN]

Comments on engagements with federal programs supporting research

Comment**	2026-03 (n=29)	2024-03 (n=33)
Alliance does not fund companies or private sector/only research/we are not eligible	4 out of 29 (14%)	24.2%
I have had a positive experience with Alliance	4 out of 29 (14%)	6.1%
Need flexible funding calls	4 out of 29 (14%)	3.0%
Alliance requirements for collaborators are not realistic	2 out of 29 (7%)	3.0%
These exclude non-profits from receiving funding	1 out of 29 (3%)	3.0%
Industry needs more funding programs	1 out of 29 (3%)	3.0%
We have supported/are supporting funding applications	1 out of 29 (3%)	3.0%
CIFAR does not have open calls for funding/invitation only	1 out of 29 (3%)	9.1%
Applications take time/haven't had time to apply	1 out of 29 (3%)	3.0%
Was not aware of CIFAR funding	1 out of 29 (3%)	3.0%
Nothing else/nothing to add	-	12.1%
NSERC Alliance funds basic research/cannot discuss science	-	6.1%
Good programs overall/recommend them	-	6.1%
Programs support development of a quantum device/not a service	-	3.0%
NSERC wants industry funding contributions with no control of use	-	3.0%
Not sure	1 out of 29 (3%)	-
Other	5 out of 29 (17%)	9.1%

**NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as the small sample sizes the percentages are not statistically reliable. ** Excludes "No comment."*

Base: Individuals in industry/non-profit or academia in the quantum sector, n=29 respondents.

Awareness and use of federal programs supporting talent

Q106-108 – Have you heard or not heard of the following federal programs that support talent? [RANDOMIZE]

Awareness of federal programs supporting talent

	2026-03 (n=86)		2024-03 (n=112)	
Programs	Heard	Not heard	Heard	Not heard
Mitacs	98.8%	1.2%	98.2%	1.8%
NSERC Create	80.2%	19.8%	76.8%	23.2%

Base: Individuals in industry/non-profit or academia in the quantum sector, n=86 respondents.

Q109-111 – Have you/your company ever applied for or received assistance (including grants, contributions, or contracts) from any of the following federal programs that support talent? [SHOW ONES HEARD OF IN Q106-108]

Use of federal programming supporting talent

	Yes, applied for but did not receive assistance/ Funding		Yes, applied for and received assistance/ Funding		Yes, applied for, but decision is pending	
Programs	2026-03	2024-03	2026-03	2024-03	2026-03	2024-03
Mitacs (n=85)	4.7%	2.8%	70.6%	59.3%	1.2%	2.8%
NSERC Create (n=69)	15.9%	10.6%	40.6%	30.6%	-	2.4%

	No did not apply for or receive assistance/ Funding		Unsure	
Programs	2026-03	2024-03	2026-03	2024-03
Mitacs (n=85)	21.2%	31.5%	2.4%	3.7%
NSERC Create (n=69)	39.1%	48.2%	4.3%	8.2%

Base: Individuals in industry/non-profit or academia in the quantum sector, n=85 respondents who have heard of at least one of the programs.

Q112 – Do you have any specific comments on your engagements with any of these federal programs that support talent?
[OPEN-ENDED]

Comments on engagements with federal programs supporting talent

Comment**	2026-03 (n=25)*	2024-03 (n=32)
Good programs/we have applied successfully	11 out of 25 (44%)	25.0%
Funding is not enough to be worth it/need more programs funded	5 out of 25 (20%)	15.6%
Programs are difficult to apply / too many requirements	3 out of 25 (12%)	25.0%
Programs do not apply to industry/have to go through academia to apply/difficult for commercialization	3 out of 25 (12%)	25.0%
Other	2 out of 25 (8%)	3.1%
Not hiring at the moment/might apply in the future	-	6.3%

**NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as the small sample sizes the percentages are not statistically reliable. ** Excludes “No comment.”*
Base: Individuals in industry/non-profit or academia in the quantum sector, n=25 respondents.

C. National Quantum Strategy (NQS) Public Opinion

Nearly all industry and academic respondents report being aware of that Canada released its National Quantum Strategy (NQS) in January 2023 (98%), with similar levels of satisfaction among those aware with the different aspects of the NQS: enabling the government and key industries to be developers and early adopters of new quantum technologies (57% satisfied; 45% in 2024), making Canada a world leader in the continued development, deployment and use of quantum computing hardware and software (54% satisfied; score of 7-10; 54% in 2024), and ensuring the privacy and cyber security of Canadians in a quantum enabled world through a national secure quantum communications network and a post-quantum cryptography initiative (44% satisfied; 51% in 2024).

About seven in ten industry and academic respondents who have heard of the NQS agree (22%) or somewhat agree (49%) that the NQS’ missions create clear priorities for quantum in Canada, while about one in four somewhat disagree (13%) or disagree (11%), which is consistent with the 2024 wave (22% agree; 47% somewhat agree). When asked why they have that opinion, industry and academic respondents mentioned the mission and priorities being clear (20%; eight percent in the 2024 wave), that priorities are not clearly defined (16%; nine percent in the 2024 wave), and the implementation being slow or having issues with implementation (14%; 12% in the 2024 wave).

A majority of industry and academic respondents aware of the NQS (88%; 85% in 2024) report they have received information from the Federal Government concerning events related to the NQS, including workshops, roundtables, and missions.

Awareness Canada released a national quantum strategy

Q113 – Prior to today, were you aware or not aware that Canada released a national quantum strategy (NQS) in January 2023?

Awareness of NQS

	Total		Academia		Industry/non-profit	
Awareness	2026-03 (n=85)	2024-03 (n=112)	2026-03 (n=44)	2024-03 (n=46)	2026-03 (n=41)	2024-03 (n=66)
Aware	97.6%	98.2%	97.7%	100.0%	97.6%	97.0%
Not aware	2.4%	1.8%	2.3%	-	2.4%	3.0%

Base: Individuals in industry/non-profit or academia in the quantum sector, n=85 respondents.

Satisfaction with aspects of NQS

Q114-116– [IF AWARE OF NQS] On a scale from 0 to 10, where 0 is not at all satisfied and 10 is very satisfied, how satisfied are you with the following aspects of the NQS's missions? [RANDOMIZE]

Satisfaction with NQS

Aspects of NQS (n=82)	Not satisfied (0-3)	Neutral (4-6)	Satisfied (7-10)	Unsure	2026-03 Mean (n=82)	2024-03 Mean (n=109)
Enable the Government of Canada and key industries to be developers and early adopters of new quantum sensing technologies.	13.4%	15.9%	57.3%	13.4%	6.6	6.7
Make Canada a world leader in the continued development, deployment and use of quantum computing hardware and software—to the benefit of Canadian industry, governments, and citizens.	14.6%	19.5%	53.7%	12.2%	6.6	6.7
Ensure the privacy and cyber-security of Canadians in a quantum-enabled world through a national secure quantum communications network and a post-quantum cryptography initiative.	13.4%	25.6%	43.9%	17.1%	6.3	6.7

Base: Individuals in industry/non-profit or academia in the quantum sector, n=82 respondents who have heard of the NQS

Q117 – Do you agree, somewhat agree, somewhat disagree, or disagree that the NQS missions create clear priorities for quantum in Canada?

Agreement that NQS missions create clear priorities

	Total		Academia		Industry/non-profit	
Agreement	2026-03 (n=82)	2024-03 (n=109)	2026-03 (n=42)	2024-03 (n=45)	2026-03 (n=40)	2024-03 (n=64)
Agree	22.0%	22.0%	19.0%	31.1%	25.0%	15.6%
Somewhat agree	48.8%	46.8%	59.5%	42.2%	37.5%	50.0%
Somewhat disagree	13.4%	15.6%	14.3%	15.6%	12.5%	15.6%
Disagree	11.0%	10.1%	4.8%	6.7%	17.5%	12.5%
Unsure	4.9%	5.5%	2.4%	4.4%	7.5%	6.3%

Base: Individuals in industry/non-profit or academia in the quantum sector, n=82 respondents who have heard of the NQS

Q118 – [IF NOT UNSURE] Why do you have that opinion? [OPEN-ENDED]

Reason for level of agreement that NQS missions create clear priorities

	Total		Academia		Industry/non-profit	
	2026-03 (n=51)	2024-03 (n=76)	2026-03 (n=28)*	2024-03 (n=30)	2026-03 (n=23)*	2024-03 (n=46)
Mission/priorities are clear	19.6%	7.9%	6 out of 28 (21%)	13.3%	4 out of 23 (17%)	4.3%
Priorities not clearly defined	15.7%	9.2%	4 out of 28 (14%)	10.0%	4 out of 23 (17%)	8.7%
Implementation is slow/issues with implementation	13.7%	11.8%	2 out of 28 (7%)	10.0%	5 out of 23 (22%)	13.0%
Not enough funding/issues with funding	9.8%	13.2%	4 out of 28 (14%)	13.3%	1 out of 23 (4%)	13.0%
Very broad objectives	7.8%	26.3%	2 out of 28 (7%)	30.0%	2 out of 23 (9%)	23.9%
Missing important opportunities (sensing, encryption, quantum materials)	5.9%	5.3%	2 out of 28 (7%)	-	1 out of 23 (4%)	8.7%
Missing the societal (social sciences) aspect such as adoption and integration	3.9%	6.6%	-	3.3%	2 out of 23 (9%)	8.7%
Not sufficiently long-term	3.9%	1.3%	2 out of 28 (7%)	3.3%	-	-
Too soon to tell	2.0%	1.3%	-	3.3%	1 out of 23 (4%)	-
Not engaged with quantum community	2.0%	3.9%	-	3.3%	1 out of 23 (4%)	4.3%
Priorities don't align with priorities of government	-	2.6%	-	-	-	4.3%
Other	11.8%	9.2%	4 out of 28 (14%)	10.0%	2 out of 23 (9%)	8.7%
Unsure	3.9%	1.3%	2 out of 28 (7%)	-	-	2.2%

**NOTE: Given that the size of the sample is of less than n=30 respondents a number of cases is reported in addition to percentages as the small sample sizes the percentages are not statistically reliable. Base: Individuals in industry/non-profit or academia in the quantum sector, n=51 respondents who have heard of the NQS and express an opinion regarding their level of agreement with NQS missions creating clear priorities for quantum in Canada.*

Q119 – Have you ever received information from the federal government (e.g., NQS Secretariat) concerning events related to the national quantum strategy, such as workshops, roundtables, missions, etc.?

Received information from the federal government about NQS events

	Total		Academia		Industry/non-profit	
Received information	2026-03 (n=80)	2024-03 (n=110)	2026-03 (n=40)	2024-03 (n=46)	2026-03 (n=40)	2024-03 (n=64)
Yes	87.5%	86.4%	90.0%	91.3%	85.0%	82.8%
No	7.5%	10.9%	-	6.5%	15.0%	14.1%
Unsure	5.0%	2.7%	10.0%	2.2%	-	3.1%

Base: Individuals in industry/non-profit or academia in the quantum sector, n=80 respondents.

Appendix A: Methodology

The survey was conducted online and was deployed to a list provided by ISED and a total of 86 individuals participated. The sample included 41 individuals in businesses/non-profits in the quantum sector (35 unique businesses) and 45 academics (15 unique universities/institutes) in the quantum sector. The survey had a response rate of 20%.

The fieldwork was conducted between February 18th and March 9th, 2026. Details on the rate of participation can be found in Appendix A and the questionnaire is provided in Appendix B.

Respondent Profile

The following table outlines the composition for the survey.

Demographic	All (n=85)	Academics (n=44)	Industry/Non-profit (n=41)
Gender			
Male	65.9%	61.4%	70.7%
Female	20.0%	22.7%	17.1%
Prefer not to answer	11.8%	11.4%	12.2%
Other	2.4%	4.5%	-
Location of head office/ research	All (n=86)	Academics (n=45)	Industry/Non-profit (n=41)
Atlantic	3.5%	4.4%	2.4%
Quebec	25.6%	20.0%	31.7%
Ontario	40.7%	40.0%	41.5%
West	29.1%	33.3%	24.4%
Special populations	All (n=83)	Academics (n=44)	Industry/Non-profit (n=39)
Person with disabilities	6.0%	11.4%	-
Racialized persons	14.5%	13.6%	15.4%
2SLGBTQIA+ community	4.8%	6.8%	2.6%
None of the above	63.9%	56.8%	71.8%
Unsure	8.4%	9.1%	7.7%

Fieldwork Dates

Fieldwork was conducted between February 18th and March 9th, 2026.

Margin of error

No margin of error is applicable to this survey.

Questionnaire design

Innovation, Science and Economic Development Canada (ISED) provided Nanos with a draft questionnaire. Nanos Research then reviewed the draft questionnaire and advised on best practices in question design. Upon

approval of the English questionnaire, Nanos Research translated the questionnaire into French which was then reviewed by ISED.

Nanos programmed the questionnaire into our system, then thoroughly tested the programming in English and French to ensure accuracy ahead of the pre-test and rollout. This procedure ensured that the survey logic accurately reflected the questionnaire and data was collected properly. The final survey questionnaire is included in Appendix B.

Survey Duration

The average survey length was 27 minutes, 49 seconds and ranged from 4.75 minutes to 4 hours as respondents self-administered the survey online at their own pace. Readers should note that in the introduction to the 2024 survey, the invitation said the questionnaire took 15 minutes to complete. In 2024 the average completion time was 27 minutes. Using a similar questionnaire with some updated content the invitation for 2026 reported an average completion time of about 25 minutes.

Quality Controls

Nanos Research monitors ten percent of all fieldwork for quality control and assurance in accordance with the standards of CRIC, ESOMAR and AAPOR.

- projects are staffed with employees best suited for the nature and subject matter of the project
- the Survey Field Manager
 - analyzes the general project summary, questionnaires, sample requirements, quota requirements and any special instructions
 - contacts the Client to clarify any grey areas
 - meticulously programs the questionnaire, incorporating all questionnaire logic and project requirements
 - extensively tests the programming to ensure that all possible scenarios are properly programmed
 - forwards the structure of the data file to the Client for approval prior to commencement of the fieldwork
 - if necessary, performs a duplication control check on the sample lists according to the Client's specifications
 - reviews or prepares the survey invitation; gets final approval from client
 - well documents all modifications made during the initial project stage and pre-test to support later inquiries on project specifications (questionnaire, sample and quotas)
 - if required, arranges for translation of the questionnaire in the language(s) needed. For verification of translation accuracy, send the translated version(s) to the Client for their review and approval. Also, if requested, arrange a back-translation by separate translators to ensure accurate translation.

Pre-field procedures – Online

Prior to any online survey going live it undergoes multi-stage testing. The process for the survey was as follows:

1. Stage 1 (Programming) - Draft programming was tested by the assigned programmer for functionality, accuracy and logic flow.

2. Stage 2 (Internal testing) – Links to the draft programming were provided to Nanos’ internal project lead team to validate that all questions and supporting information (e.g. links, background information, etc.) correctly display, that logic branches successfully trigger, and that data is captured in the survey database.
3. Stage 3 (Client validation) – Once Stage 1 and 2 testing has been successfully completed, testing links were provided to the client for their testing and approval in both English and French. Feedback received from the client was incorporated into the programming where required and the testing cycle recommences from Stage 1.

Fieldwork Procedures – Online

- Before invitation emails were sent, unique PIN numbers were tagged onto the survey links in order to identify and track survey attempts from individual respondents. With a unique PIN, each respondent can only complete the survey once.
- Project Managers oversee the validation and correction of erroneous email addresses. Log records are maintained for each email sent.
- After the first day of data collection is completed, the CAWI questionnaire is checked to ensure question wording, response codes and questionnaire logic are correctly programmed. Actual survey data is used to verify the programming.
- If there are errors or omissions due to questionnaire logic or CAWI programming, data collection is temporarily suspended while the programming is immediately corrected and re-tested.
- Data is also tested for respondent consistency, scanned for patterns (either general or within a specific case). If any record shows an illogical response or a peculiar pattern, it will be investigated, and if it is determined to be unsound, it will be removed from the completed interviews.
- Project Managers regularly check the project connection logs within the online survey system to review the connect time of all respondents who have completed a survey for each project. The connect time (duration) is monitored to find any record that may be questionable (e.g. a survey with a much lower than average duration). If such a record is found, the data for that case will be reviewed and tested, and if it is determined not to be a valid complete, it will be removed from the completed count and cumulative data.

Post-field Procedures – Online

The Survey Field Manager prepares a final participation report and web connection summary that includes relevant survey statistics such as total completed interviews, total contacts made / total invitations sent, terminations due to various reasons, average duration of the questionnaire, incidence rate, response rate, etc.

Non-response bias

- To reduce non-response errors for a web survey, a few techniques were employed.
 - Reminder emails are sent, again containing the survey link.
 - Project Managers regularly checked on the completion status of web questionnaires. If a partially completed web questionnaire remained uncompleted for over 3 (or 5) days, a reminder email was sent.

Response Rate

The response rate for this survey was 20%.

2026-2976 - ISED Quantum - Response Rate		
A	Number of Contacts Provided by Client	443
B	Invalid Contacts	12
C	Potential Contacts (C=A-B)	431
D	Number of Completes	86
E	Refusals	0
F	Response Rate (Completed Surveys) (F=D/C)	20%

Appendix B: Survey questionnaire

INTRODUCTION

Si vous préférez répondre au sondage en français, veuillez choisir « Français » dans le menu déroulant situé en haut de cette page.

Welcome and thank you for taking part in the survey of the Canadian quantum ecosystem. This survey is conducted by Nanos Research on behalf of Innovation, Science, and Economic Development Canada (ISED). In January 2023, the Government of Canada released the National Quantum Strategy (NQS) to build on past successes and guide future efforts. Your feedback is key to gathering an accurate picture of the Canadian quantum sector.

The survey takes **about 25** minutes to complete and your participation is voluntary and confidential. All your responses will remain anonymous and will be grouped with others to identify common themes and priorities, and to ensure no particular individual can be identified in any reporting for this research. Any information you provide will be administered in accordance with the [Privacy Act, the Access to Information Act](#), and any other relevant legislation. For more information on how the data is collected, used and protected, please consult the Nanos Research [Privacy Policy](#).

Please take the time to complete the survey by March 1st, 2026.

This research project is registered with the Canadian Research Insights Council (CRIC) Research Verification Service that allows you to verify its legitimacy and share your feedback. If you have feedback on this research, you can share it by going to <https://canadianresearchinsightscouncil.ca/rvs> and using the RVS code: XXXXXX.

Should you need an alternative means to access this survey please contact ISED's [public opinion research team](#)

Initial Branch Question

1. In which sector do you primarily work in? [SELECT ONE]
Academia 1 [SKIP TO ACADEMIC QS – Q31]
Industry/Not for Profit..... 2 [SKIP TO INDUSTRY QS – Q3]
Both Academia and Industry 3 [GO TO Q2]
2. [IF SELECTED BOTH] Which sector do you spend more working time on within Canada's quantum community?
Please select only one role as the questions that follow will be specific to your response.
Academia 1 [STREAM 2 – ACADEMIC – Skip to Q31]
Industry/Not for Profit..... 2 [STREAM 1 – INDUSTRY – Go to Q3]

INDUSTRY STREAM

General Questions

Our first few questions will help group your responses.

3. In which province or territory is your organization headquartered? [SELECT ONE]

Alberta	1
British Columbia	2
Manitoba	3
New Brunswick	4
Newfoundland and Labrador.....	5
Northwest Territories	6
Nova Scotia.....	7
Nunavut	8
Ontario	9
Prince Edward Island	10
Quebec	11
Saskatchewan	12
Yukon.....	13
Outside Canada (please specify) TEXT BOX	20

4. Does your organization have offices in other locations that work on quantum technologies? (please specify)
Select all options that apply.

Alberta	1
British Columbia	2
Manitoba	3
New Brunswick	4
Newfoundland and Labrador.....	5
Northwest Territories	6
Nova Scotia.....	7
Nunavut	8
Ontario	9
Prince Edward Island	10
Quebec	11
Saskatchewan	12
Yukon.....	13
[NEW] United States.....	14
[NEW] United Kingdom	15
[NEW] Japan	16
[TWEAKED] Other locations outside Canada (please specify) TEXT BOX	20
No other locations	99

5. Does your organization have remote employees in any of the following places that work on quantum technologies? (please specify) Select all options that apply.

Alberta	1
British Columbia	2
Manitoba	3
New Brunswick	4
Newfoundland and Labrador.....	5
Northwest Territories	6
Nova Scotia	7
Nunavut	8
Ontario	9
Prince Edward Island	10
Quebec	11
Saskatchewan	12
Yukon.....	13
[NEW] United States.....	14
[NEW] United Kingdom	15
[NEW] Japan	16
[TWEAKED] Other locations outside Canada (please specify) TEXT BOX	20
No other locations	14 [EXCLUSIVE, ANCHOR]

6. Including yourself, approximately how many full-time staff does your organization employ in Canada that work on quantum technologies?

1 to 9.....	1
10 to 19.....	2
20 to 29.....	3
30 to 39.....	4
40 to 49.....	5
50 to 99.....	6
100 or more	7
Not sure	77

7. How many years has your organization been in business?

Less than 5 years	1
5 to 9 years	2
10 to 14 years	3
15 to 19 years	4
20 years or more	5
Not sure	77

Research

8. In which areas does your organization conduct research and development in quantum technologies? [SELECT ALL THAT APPLY]

Quantum computing hardware	1
Quantum software	2
Quantum communications and cryptography	3
Quantum sensors	4
Quantum materials.....	5
Other (Please specify): OPEN.....	20

9. Does your organization collaborate with the following entities? [RANDOMIZE] [SELECT ALL THAT APPLY]
- | | |
|--|----|
| Companies located in Canada | 1 |
| Companies located outside of Canada | 2 |
| Universities/colleges in Canada | 3 |
| Universities/colleges in other countries..... | 4 |
| [TWEAKED] Canadian research institutes such as the Institute for Quantum Computing (IQC)..... | 5 |
| Government laboratories or international research institutes in other countries, such as the U.S. Department of Energy | 6 |
| [TWEAKED] Canadian Federal government laboratories such as the National Research Council (NRC). .. | 7 |
| None of the above | 99 |

On a scale from 0 to 10, where 0 is not at all important and 10 is very important, how important is it for your organization to collaborate with the following entities to advance your research interests? [RANDOMIZE]

- | | |
|--|----|
| 10. Companies located in Canada | |
| 11. Companies located outside of Canada | |
| 12. Universities/colleges in Canada | |
| 13. Universities/colleges in other countries | |
| 14. [TWEAKED] Canadian research institutes such as the Institute for Quantum Computing (IQC) | |
| 15. Government laboratories or International research institutes in other countries, such as the U.S. Department of Energy | |
| 16. [TWEAKED] Canadian Federal government laboratories such as the National Research Council (NRC). | |
| 0 (Not at all important)..... | 0 |
| 1..... | 1 |
| 2..... | 2 |
| 3..... | 3 |
| 4..... | 4 |
| 5..... | 5 |
| 6..... | 6 |
| 7..... | 7 |
| 8..... | 8 |
| 9..... | 9 |
| 10 (Very important)..... | 10 |
| Unsure | 77 |
17. [IF COLLABORATES WITH ANY ORGS IN Q9 R1-7] What is the main benefit for your organization, if any, of these collaborations? **[OPEN]**
18. [IF COLLABORATES WITH ANY ORG IN Q9 R1-7] What has been the main output of these collaborations? [SELECT ALL THAT APPLY][RANDOMIZE]
- | | |
|--------------------------------------|-------------|
| Expanded network..... | 1 |
| Ongoing collaboration | 2 |
| Publication..... | 3 |
| Conference Presentation..... | 4 |
| Prototype..... | 5 |
| Market-ready product or service | 6 |
| Patent | 7 |
| Other [TEXT BOX] | 20 [ANCHOR] |
19. [IF DOES NOT COLLABORATE WITH ANY ORGS IN Q9R99] What is the main barrier, if any, preventing your organization from collaborating? [OPEN]

Talent

20. How likely or unlikely is your organization to remain in Canada in the next five years?

Likely1
 Somewhat likely2
 Somewhat unlikely4
 Unlikely.....5
 Unsure77

21. In the **past** six months, has your organization tried to fill positions for which a quantum science and technology background is important?

Yes1 [Go to Q22]
 No2 [Go to Q27]
 Unsure77 [Go to Q27]

22. Where was your organization's search mainly conducted? [SELECT ALL THAT APPLY]

Domestic (in Canada)1
 The United States2
 Europe3
 Asia4
 Other International (Specify)20
 Unsure77

23. Were there any qualified *Canadian* candidates that met your organization's needs?

Yes 1
 No 2
 Not applicable/did not search in Canada 3
 Unsure 77

24. What recruiting tools were the most helpful for your organization to find qualified candidates? [SELECT ALL THAT APPLY]

Recruiting agency1
 [TWEAKED] Job posting websites [Quantum Industry Canada job board, monster.ca, Indeed, etc.] 2
 Social media [LinkedIn].....3
 Other [please specify].....20
 Unsure77

25. What was the result of the hiring process? [select one]

My organization filled all of the positions we were hiring1
 My organization filled some of the positions we were hiring2
 My organization did not fill any of the positions we were hiring 3
 The process is still ongoing.....4
 Other (Specify).....20
 Unsure77

26. What was the main barrier, if any, to hiring someone to work at your organization? [RANDOMIZE][select one]

Candidate expectations (e.g. salary, benefits)	1
Lack of qualified candidates	2
Candidates unwilling to relocate	3
Immigration barriers.....	4
Other [please specify]	20
Unsure	77

27. In the **next** six months, how likely or unlikely is your organization to hire people for positions where a quantum science and technology background is important?

Likely	1
Somewhat likely	2
Somewhat unlikely	3
Unlikely	4
Unsure	77

28. From the list below, please identify areas of quantum technologies for which there is a shortage of skilled people in Canada? [select all that apply][RANDOMIZE]

Quantum computing hardware	1
Quantum software	2
Quantum communications and cryptography	3
Quantum sensors	4
Quantum materials.....	5
Other [please specify]	20
None of the above	6
Unsure	77

29. Which of the following groups, if any, are represented in your organization's workforce? [RANDOMIZE]

Women	1
Indigenous people	2
Persons with disabilities	3
Racialized persons [persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour],	4
2SLGBTQIA+ community)	5
None of the above	5
Unsure	77

30. What is the biggest challenge, if any, for your organization when hiring a more diverse workforce? [OPEN]

[INDUSTRY – NOW SKIP TO Q63]

ACADEMIA STREAM

General

Our first few questions will help group your responses.

31. What is your role within academia? [SELECT ONE]

Professor (include Associate, Assistant, Professor)	1
Lecturer/Sessional	2
Postdoctoral	3
Graduate student	4
Researcher	5
Undergraduate student	6
Other (please specify)	20

32. Where do you primarily conduct your work/studies? [SELECT ONE]

Alberta	1
British Columbia	2
Manitoba	3
New Brunswick	4
Newfoundland and Labrador	5
Northwest Territories	6
Nova Scotia	7
Nunavut	8
Ontario	9
Prince Edward Island	10
Quebec	11
Saskatchewan	12
Yukon	13
Outside Canada (please specify) TEXT BOX	20

33. How many years have you been working/studying in this field?

Less than 5 years	1
5 to 9 years	2
10 to 14 years	3
15 to 19 years	4
20 years or more	5

34. Which of the following groups, if any, are represented in your department's workforce? [RANDOMIZE]

Women	1
Indigenous people	2
Persons with disabilities	3
Racialized persons [persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour],	4
2SLGBTQIA+ community)	5
None of the above	5
Unsure	77

Research:

35. In which areas do you conduct research and development in quantum technologies?

Quantum computing hardware	1
Quantum software	2
Quantum communications and cryptography	3
Quantum sensors	4
Quantum materials.....	5
Other [SPECIFY]	20

36. What department in the university/college are you with?

Physics	1
Mathematics.....	2
Engineering.....	3
Computer Science.....	4
Other [please specify]	20

37. [TWEAKED] In quantum research, do you collaborate with the following entities? [RANDOMIZE][SELECT ALL THAT APPLY]

Companies located in Canada	1
Companies located outside of Canada	2
Universities/colleges in Canada	3
Universities/colleges in other countries.....	4
[TWEAKED] Canadian research institutes such as the Institute for Quantum Computing (IQC)	5
[TWEAKED] Canadian Federal government laboratories such as the National Research Council (NRC).7	
Government laboratories and international research institutes in other countries, such as the U.S. Department of Energy	8
None of the above	9

[TWEAKED] On a scale from 0 to 10, where 0 is not at all important and 10 is very important, how important is it for you to collaborate with the following entities to advance your research interests? [RANDOMIZE]

- 38. Companies located in Canada
- 39. Companies located outside of Canada
- 40. Universities/colleges in Canada
- 41. Universities/colleges in other countries
- 42. [TWEAKED] Canadian research institutes such as the Institute for Quantum Computing (IQC)
- 43. Government laboratories and international research institutes in other countries, such as the U.S Department of Energy
- 44. [TWEAKED] Canadian Federal government laboratories such as the National Research Council (NRC).

0 (Not at all important).....0
 1.....1
 2.....2
 3.....3
 4.....4
 5.....5
 6.....6
 7.....7
 8.....8
 9.....9
 10 (Very important).....10
 Unsure77

- 45. [IF COLLABORATES WITH ANY ORG IN Q37R1-8] What is the main benefit for you, if any, of these collaborations? [OPEN]

- 46. [IF COLLABORATES WITH ANY ORG IN Q37R1-8] What has been the main output of these collaborations? [SELECT ALL THAT APPLY][RANDOMIZE]

Expanded network.....1
 Ongoing research collaboration2
 Publication.....3
 Conference Presentation.....4
 Prototype.....5
 Market-ready product or service6
 Patent7
 Other [TEXT BOX]20

- 47. [IF DOES NOT COLLABORATE WITH ANY ORG IN Q37R9] What is the main barrier, if any, preventing you from collaborating? [OPEN]

Talent

- 48. How likely or unlikely are you to remain in Canada in the next five years to pursue your research?

Likely.....1
 Somewhat likely2
 Somewhat unlikely3
 Unlikely.....4
 Unsure77

On a scale from 0 to 10, where 0 is not at all important and 10 is very important, how important or not important are the following factors to you when choosing where to conduct your research? [RANDOMIZE]

- 49. Salary
- 50. Quality of life
- 51. Funding opportunities
- 52. Professional connections
- 53. Reputation of institution
- 54. National Moonshot programs
- 55. Strength of the local quantum community
- 56. Other (Specify) [ANCHOR LAST]

0 (Not at all important).....0
 1.....1
 2.....2
 3.....3
 4.....4
 5.....5
 6.....6
 7.....7
 8.....8
 9.....9
 10 (Very important).....10
 Unsure77

57. Has your department attempted to hire a new faculty member in quantum in the past six months?

Yes 1 [GO TO Q58]
 No2 [SKIP TO Q60]
 Unsure77 [SKIP TO Q60]

58. What was the result of the hiring process? [select one]

My department filled all of the positions we were hiring1
 My department filled some of the positions we were hiring2
 My department did not fill any of the positions we were hiring.3
 The process is still ongoing.....4
 Other (Specify).....20
 Unsure77

59. What was the main barrier, if any, to hiring a new faculty member to work in your department?

[RANDOMIZE][select one]

Candidate expectations (e.g. salary, benefits) 1
 Lack of qualified candidates 2
 Candidates unwilling to relocate 3
 Immigration barriers..... 4
 Other [please specify]..... 20
 Unsure 77

60. In your opinion, what is the biggest challenge for your department when cultivating a diverse workforce?

[OPEN]

Academia Commercialization:

61. Are you primarily engaged in fundamental or applied research?

Fundamental research..... 1

Applied research..... 2

Both fundamental and applied research 3

62. In addition to your primary work in academia, do you also currently play any role for a quantum company?

Yes, I work at a quantum company as an Executive or Board Member 1

Yes, I work at a quantum company as an employee 2

Yes, I work at a quantum company as a consultant 3

No, I do not work at a quantum company..... 4

[ASK ALL] Commercialization of technologies:

63. Have you/your organization ever filed a patent related to quantum technologies?

Yes1

No2

64. Have you/your organization engaged with potential end users of your product or service within the past year?

Yes[Go to Q65]

No2 [Skip to Q67/68]

65. How interested or not interested are potential end users in adopting quantum technologies?

Interested1

Somewhat interested2

Somewhat not interested.....3

Not interested4

I don't know.....77

66. How comfortable or not comfortable are potential end users with adopting quantum products or services?

Comfortable.....1

Somewhat comfortable2

Somewhat not comfortable3

Not comfortable4

I don't know.....77

67. [ASK INDUSTRY ONLY] What is the main barrier, if any, preventing end users from adopting quantum solutions?

[OPEN]

68. [ASK ACADEMICS ONLY] What is the main barrier, if any, preventing the commercialization of your research?

[OPEN]

69. Do you/does your organization have a market-ready quantum product or service?

Yes1 [Go to Q70]

No2 [SKIP to Q71]

I don't know.....3 [SKIP to Q71]

70. [NEW] If yes, which would be the main markets for your quantum product or service? [SELECT ALL THAT APPLY]
[RANDOMIZE]
- | | |
|-----------------------------|----------------|
| Domestic (Canada)..... | 1 |
| United States | 2 |
| United Kingdom..... | 3 |
| France..... | 4 |
| Germany | 5 |
| Japan..... | 6 |
| Denmark | 7 |
| Netherlands..... | 8 |
| Australia..... | 10 |
| South Korea | 11 |
| Other [please specify]..... | 20 |
| Unsure | 77 [EXCLUSIVE] |

[ASK ALL] Awareness and Use of Federal Programming

71. On a scale from 0 to 10, where 0 is not knowledgeable at all and 10 is very knowledgeable, to what extent are you knowledgeable of how federal programming can support quantum research and development?
- | | |
|------------------------------------|----|
| 0 (Not at all knowledgeable) | 0 |
| 1..... | 1 |
| 2..... | 2 |
| 3..... | 3 |
| 4..... | 4 |
| 5..... | 5 |
| 6..... | 6 |
| 7..... | 7 |
| 8..... | 8 |
| 9..... | 9 |
| 10 (Very knowledgeable)..... | 10 |
| Unsure | 77 |

Have you heard or not heard of the following federal programs that support commercialization? [RANDOMIZE]

- | | |
|--|---|
| 72. [TWEAKED] Business Development Bank of Canada (BDC) Deep Tech Fund | |
| 73. Global Innovation Clusters | |
| 74. Innovation for Defence Excellence and Security (IDEaS) | |
| 75. [TWEAKED] Innovative Solutions Canada (ISC) | |
| 76. NRC Challenge Programs | |
| 77. [TWEAKED] NRC Industrial Research Assistance Program (IRAP) | |
| 78. [NEW] Canada Economic Development for Quebec Regions | |
| 79. [NEW] Federal Economic Development Agency for Southern Ontario | |
| 80. [NEW] Prairies Economic Development Canada | |
| 81. [NEW] Pacific Economic Development Canada (PacifiCan) | |
| 82. [TWEAKED] Strategic Response Fund (SRF) – formerly Strategic Innovation Fund (SIF) | |
| 83. Other [TEXT BOX] | |
| Heard of..... | 1 |
| Not heard of | 2 |

Have you/your company ever applied for or received assistance (including grants, contributions or contracts) from any of the following programs that support commercialization? [SHOW ONES HEARD OF IN Q72-83]

- 84. [TWEAKED] Business Development Bank of Canada (BDC) Deep Tech Fund
- 85. Global Innovation Clusters
- 86. Innovation for Defence Excellence and Security (IDEaS]
- 87. [TWEAKED] Innovative Solutions Canada (ISC)
- 88. NRC Challenge Programs
- 89. [TWEAKED] NRC Industrial Research Assistance Program (IRAP)
- 90. [NEW] Canada Economic Development for Quebec Regions
- 91. [NEW] Federal Economic Development Agency for Southern Ontario
- 92. [NEW] Prairies Economic Development Canada
- 93. [NEW] Pacific Economic Development Canada (PacifiCan)
- 94. [TWEAKED] Strategic Response Fund (SRF)– formerly Strategic Innovation Fund (SIF)
- 95. Other [TEXT BOX] [ANCHOR]
 - Yes, applied for but did not receive assistance/funding 1
 - Yes, applied for and received assistance/funding 2
 - Yes applied for, but decision is pending 3
 - No, did not apply for or receive assistance/funding 4
 - Unsure 77

96. Do you have any specific comments on your engagements with any of these federal programs that support commercialization? [OPEN]

Have you heard or not heard of the following federal programs that support research?

- 97. Bank of Canada PIVOT program
- 98. [TWEAKED] Canadian Institute for Advanced Research (CIFAR)
- 99. NSERC Alliance Quantum
- 100. Other [TEXT BOX] [ANCHOR]
 - Heard of1
 - Not heard of2

Have you/your company ever applied for or received assistance (including grants, contributions or contracts) from any of the following federal programs that support research? [SHOW ONES HEARD OF IN Q97-100]

- 101. Bank of Canada PIVOT program
- 102. [TWEAKED] Canadian Institute for Advanced Research (CIFAR)
- 103. NSERC Alliance Quantum
- 104. Other [TEXT BOX] [ANCHOR]
 - Yes, applied for but did not receive assistance/funding 1
 - Yes, applied for and received assistance/funding 2
 - Yes applied for, but decision is pending 3
 - No, did not apply for or receive assistance/funding 4
 - Unsure 77

105. Do you have any specific comments on your engagements with any of these federal programs that support research [TEXT BOX]

Have you heard or not heard of the following federal programs that support talent? [RANDOMIZE]

106.Mitacs

107.NSERC CREATE

108.Other [TEXT BOX] [ANCHOR]

Heard of1

Not heard of2

Have you/your company ever applied for or received assistance (including grants, contributions or contracts) from any of the following federal programs that support talent? [SHOW ONES HEARD OF IN Q106-108]

109.Mitacs

110.NSERC CREATE

111.Other [TEXT BOX] [ANCHOR]

Yes, applied for but did not receive assistance/funding 1

Yes, applied for and received assistance/funding 2

Yes applied for, but decision is pending 3

No, did not apply for or receive assistance/funding 4

Unsure 77

112. Do you have any specific comments on your engagements with any of these federal programs that support talent? [TEXT BOX]

[ASK ALL] NQS public opinion

113.Prior to today, were you aware or not aware that Canada released a national quantum strategy (NQS) in January 2023?

Aware1 [GO TO Q114]

Not aware2 [SKIP TO Q120 DURING ROLLOUT]

[IF AWARE IN Q113] On a scale from 0 to 10, where 0 not at all satisfied and 10 is very satisfied, how satisfied are you with the following aspects of the NQS's missions? [RANDOMIZE]

114.Make Canada a world leader in the continued development, deployment and use of quantum computing hardware and software—to the benefit of Canadian industry, governments and citizens.

115.Ensure the privacy and cyber-security of Canadians in a quantum-enabled world through a national secure quantum communications network and a post-quantum cryptography initiative.

116.Enable the Government of Canada and key industries to be developers and early adopters of new quantum sensing technologies.

0 (Not at all satisfied)0

11

22

33

44

55

66

77

88

99

10 (Very satisfied)10

Unsure77

117. Do you agree, somewhat agree, somewhat disagree or disagree that the NQS missions create clear priorities for quantum in Canada?

Agree1
Somewhat agree.....2
Somewhat disagree3
Disagree4
Unsure77 [SKIP TO Q119]

118. [IF NOT UNSURE] Why do you have that opinion [OPEN]

119. Have you ever received information from the federal government (e.g. NQS Secretariat) concerning events related to the national quantum strategy, such as workshops, roundtables, missions, etc.?

Yes1
No2
Unsure77

Our last question will help us group your responses.

120. What is your gender?

Female 1
Male..... 2
Other (please specify) 3
Prefer not to answer 4

121. Do you identify with any of the following groups? [RANDOMIZE] (Multiple selection)? [RANDOMIZE]

Indigenous people 1
Persons with disabilities 2
Racialized persons [persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour] 3
2SLGBTQIA+ community) 4
None of the above 5
Unsure 77

Thank you very much for taking the time to complete the survey. This survey was conducted on behalf of [Innovation, Science and Economic Development](#).