



# Business Outlook and Innovation for Success Campaign Evaluation

## Final Report

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# Executive Summary

## A. BACKGROUND AND OBJECTIVES

Innovation, Science and Economic Development Canada (ISED) conducted public opinion research for an advertising campaign aimed at increasing awareness of the programs and services that support Canadian businesses looking to start-up, scale-up and export.

The campaign was designed to drive small and medium-sized enterprise (SME) owners and entrepreneurs to [innovation.canada.ca](https://innovation.canada.ca) where they can access information on programs and services targeted to their needs.

In addition to creative testing prior to launch, the research comprises pre- and post-campaign evaluation designed to establish a baseline for Government of Canada campaigns with the Canadian business audience and to capture the current business environment and outlook for Canadian entrepreneurs.

Specifically, the research objectives for this project were to

- evaluate the impact of the campaign on building awareness and usage of the [innovation.canada.ca](https://innovation.canada.ca) website and Government of Canada programs promoted via the website;
- establish benchmark data for government to business advertising on selected media;
- understand attitudes towards the ads tested; and
- get an updated read on SME's outlook on the current business environment, their key challenges and perceptions of the performance of the Government of Canada in supporting businesses, assess if these have shifted from the baseline survey, and drill down further on the needs of SMEs.

# B. METHODOLOGY

## 1. Qualitative Phase

A total of three creative concepts were tested qualitatively via focus groups. Eight focus groups were conducted in total among the various business audiences listed in the table below. Two of the focus groups took place in-person among business owners and entrepreneurs in the Greater Toronto Area (GTA) and the remaining six focus groups were conducted online targeting business owners and intermediaries from across Canada, including French speakers, women entrepreneurs and youth. Fieldwork took place between December 10th – 13th, 2018. The focus groups ranged from 90 to 120 minutes in length, and participants received a remuneration between \$250 and \$300 (full information is available in the Screener, Annex B).

STATEMENT OF LIMITATIONS: When interpreting the qualitative findings, it is important to note that the objective was to uncover views in-depth as opposed to producing statistically representative results. Therefore, the results are not projectable to the population. The insights from the research were used to refine the concepts and to inform the quantitative research phase.

| In-person GTA focus groups             |                    |
|--|--------------------|
| Small business owners (0-99 employees) | 1 group in English |
| Women entrepreneurs                    | 1 group in English |

| Online focus groups   |  |
|---|--|
| Intermediaries (accountants, lawyers and financial services branch managers that provide services to small business owners) | 1 group in English                       |
| Medium business owners (100 to 499 employees)   | 2 groups in English<br>1 group in French |
| Women entrepreneurs   | 1 group in French                        |
| Young business owners (18-34 years old)   | 1 group in English                       |

## 2. Quantitative Phase

The quantitative phase consisted of two online surveys, including a pre-campaign baseline and post-campaign evaluation each with a national sample of SME business owners or decision makers. In total, 713 online surveys were conducted in the baseline survey and 793 were conducted in the post-campaign survey. Quotas were placed on the proportion of completed surveys by business size, women-led businesses , and businesses led by young entrepreneurs (18-34 years old).

The surveys were conducted in English and French with the baseline survey taking place between January 31 and February 19, 2019 and the post-campaign survey taking place between June 11 and 22, 2019.

Random Iterative Method (RIM) weighting was employed to balance demographics by two variables (business size and region) to ensure that the survey sample’s composition reflects that of 2016 Census data and to provide results intended to approximate the sample universe.

The following table shows the definition of business size and the sample sizes for each.

| Business Size              | Sample Size Unweighted |            | Sample Size Weighted |            | Proportion  |             |
|----------------------------|------------------------|------------|----------------------|------------|-------------|-------------|
|                            | Pre                    | Post       | Pre                  | Post       | Pre         | Post        |
| Micro < 5 employees        | 307                    | 413        | 399                  | 444        | 56%         | 56%         |
| Small 5 < 99 employees     | 299                    | 285        | 299                  | 333        | 42%         | 42%         |
| Medium 100 < 499 employees | 107                    | 95         | 14                   | 16         | 2%          | 2%          |
| <b>TOTAL</b>               | <b>713</b>             | <b>793</b> | <b>712</b>           | <b>793</b> | <b>100%</b> | <b>100%</b> |

STATEMENT OF LIMITATIONS: The quantitative research was conducted with respondents from an online panel. Since the samples used in online panel surveys are based on self-selection and are not a random probability sample, no formal estimates of sampling error can be calculated. Although opt-in panels are not random probability samples, online surveys with the general population resemble a random sample closely if they are well designed and employ a large, well-maintained panel.

## **C. CONTRACT VALUE**

The contract value for this research was \$244,748.73 (HST included).

## **D. REPORT**

This report begins with an executive summary outlining key findings and conclusions, followed by a detailed analysis of the survey data. The Annex contains a full report on the qualitative findings, as well as the discussion guide and baseline and post-campaign surveys. In the quantitative findings, to improve readability, the results of the baseline survey are referred to as “Pre” and results of the post-campaign survey are referred to as “Post”.

## **E. USE OF FINDINGS OF THE RESEARCH**

The findings of this study will help ISED improve the effectiveness of its communications, marketing and outreach efforts in support of its mandate to help businesses innovate, thrive and continue to contribute to the success of the Canadian economy.



## F. KEY FINDINGS

### Concept Testing

- The main findings from the qualitative creative test were incorporated into the final execution, including, a shift toward the winning ad that was found to knit together the trifecta of FUNDING + ADVICE + PARTNERSHIPS perfectly with what many SMEs were looking for, as did the narrative around ‘new markets’, ‘growth’ and ‘tailored advice’. The selection of creatives that were inclusive of service, rural, urban and high-tech businesses was borne of these findings to underscore that “all businesses are welcome” on the innovation portal; this inclusiveness was well-received by test audiences and subsequently by the advertisement’s target audiences.

### Campaign Impact

- The campaign was successful in driving visits to [innovation.canada.ca](https://innovation.canada.ca). The site had more visits during the 15 weeks of the campaign than it had over an entire year. This surpassed the expected number of unique visits during the campaign.\* Incorporating a recommendation from the qualitative to place the Government of Canada logo more prominently to strengthen the brand link, and increase the credibility of the ads, in order to promote stronger click through, likely contributed to the strong click through rate achieved.
- Almost 2 out of 10 SMEs in Canada -- over 800,000 business owners and entrepreneurs -- recalled the campaign and 31% of them visited the website. Visits were highest among businesses looking to scale-up. This was foreshadowed in the qualitative research where the winning concept performed well on delivering the message that the site will help businesses looking to grow.

\*Source. Web metrics/Innovation Canada Ad Campaign Internal Report prepared by The Strategic Communications and Marketing Sector, Fall 2019

- A key learning from the research was the value of using mixed media with the Canadian SME audience. Those who recalled the campaign through two different mediums were significantly more likely to visit the website. In total, 50% of these SMEs indicated visiting the website. Those who saw more than one ad also reacted more positively to the campaign – e.g., agreeing the website would help their business.
- The campaign performed well not only in the call to action to the site, but in educating SMEs about where to go if they want more information even if they did not visit the site. In total, 81% of those who recalled the campaign indicated knowing where to go for Government of Canada programs for businesses.

### **Attitudes Towards the Ads**

- The campaign was well received (after exposure), with over half (56%) agreeing the ads clearly convey that the Government of Canada has built a website to help Canadian entrepreneurs and businesses, and that the ads talk about an important topic. However, less than half (46%) agreed the ads provide new information. This may indicate a predisposition to notice the ads among those already aware of programs and services offered by the Government of Canada and/or with the call to action being to visit the website the ads themselves didn't explicitly discuss the programs and services enough. While 55% of those who recalled the campaign felt the ads clearly conveyed the Government of Canada is trying to help businesses, only 27% who did not recall the campaign felt this way after exposure to the ads. This indicates that direction to the website alone may not have been enough to effectively communicate government support. More explicit narrative about what programs and services are available through [innovation.canada.ca](https://innovation.canada.ca) portal is recommended in future outreach or campaigns.

## Business Outlook for SMEs

- The qualitative phase provided a strong indication that the issue weighing most heavily on the minds of SMEs is how to scale up effectively. While starting up is a challenge, the struggle to scale up is tougher. This was validated in the quantitative where helping businesses scale up was found to be among the top areas that SMEs want the Government of Canada to prioritize.
- These discussions also revealed that access to financing, and supports and advice in building a customer base are the fundamental barriers to scaling-up.
- Accessing financing is a common preoccupation among SMEs and may cause them to focus more strongly on what financing the Government of Canada can provide, while overlooking the programs and services available to help them to access more financing than government loans alone. Also for this reason, SMEs may overlook the utility of the government programs in helping provide advice and support in building a customer base.
- Future advertising and outreach should make a stronger effort to couple any messaging around financial support with tangible examples of the value of advice to guide businesses looking to grow their client base and scale up effectively. It is not just about the money, it is also about how best to use the money once you get it.
- In terms of both messaging and tone, the research found that business advertising may be over-using the word technology and references to tech. Many SMEs do not see themselves as a tech company even though they may be using new technology in their business. Future campaign concepts should have an option where the tone is not solely focused around tech.

## Government of Canada Support for SMEs

- When we asked business what the Government of Canada should emphasize to support SMEs, their top-rated priorities were :
  1. Ensuring Canada has a competitive business tax regime
  2. Helping businesses ready to scale up and grow gain access to relevant financing
- However note that business assigned these two priority areas relatively low ratings in terms of performance by the Government of Canada.

## G. POLITICAL NEUTRALITY STATEMENT AND CONTACT INFORMATION

I hereby certify as Senior Officer of Ipsos that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Directive on the Management of Communications and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

A handwritten signature in black ink, appearing to read "M. Colledge".

Mike Colledge

President

Ipsos Public Affairs

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# 1. Baseline Pre- and Post-Campaign Results

## PRE- AND POST-CAMPAIGN RESULTS

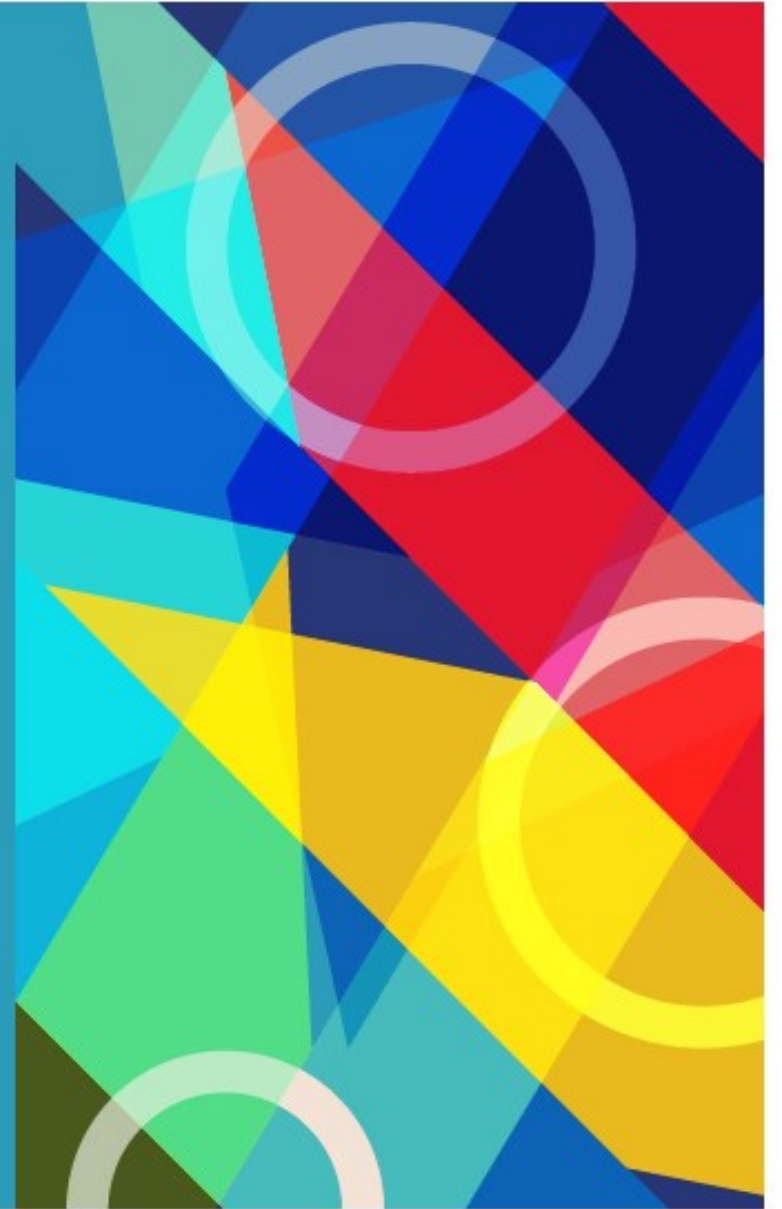
- The campaign was successful in driving visits to [innovation.canada.ca](http://innovation.canada.ca). The site had more visits during the 15 weeks of the campaign than it had over the previous entire year. This surpassed the expected number of unique visits during the campaign.
- Over 800,000 SMEs recalled the campaign -- that is, almost 2 out of 10 SMEs in Canada.
- Of those who recalled the campaign, 31% visited the website [innovation.canada.ca](http://innovation.canada.ca). Visits were highest among businesses looking to scale-up. This was foreshadowed in the qualitative where the winning concept performed well on delivering the message that the site will help business looking to grow. Awareness of the campaign was found to be higher among small business respondents (5 to 99 employees) than micro-business respondents (0 to 5 employees).
- While there was no change in awareness or uptake across the total pre- and post-samples, respondents who recall the campaign are significantly more likely to:
  - say they would know where to find information about Government of Canada programs that you could access to help your business (81% recall campaign vs. 47% no recall);
  - report they are aware of the website the Government of Canada has built to help businesses (61% recall campaign vs. 21% no recall);
  - say they've visited [innovation.canada.ca](http://innovation.canada.ca) (31% recall campaign vs. 4% no recall).
- The multi-channel approach was successful in that those who saw two or more ads were significantly more likely than those who just recalled one to be aware of the website and say they've visited the website. Those who saw more than one ad also reacted more positively to the campaign – e.g., agreeing it provided new information, agreeing the website would help their business.

## PRE- AND POST-CAMPAIGN RESULTS - continued

- It is important to note that the campaign achieved these benchmarks during an usually busy period for government to business advertising at the federal level. During the 15 weeks of the campaign other departments and Crown Corporations were running TV campaigns: Economic and Social Development Canada (ESDC), Business Development Bank of Canada (BDC) and Export Development Canada (EDC) – with BDC and EDC also targeting Canadian businesses wanting to grow and export.
- Finally, the campaign was useful in building a more positive impression of the Government of Canada in their support of SMEs. Those who recall the campaign report significantly more positive perceptions of what the Government of Canada is doing to support business in several areas, most specifically in helping businesses who want to scale-up access financing.
- Those who recalled the campaign also were more likely to indicate that the Government of Canada is doing a good job at creating the right economic conditions for businesses to succeed and providing businesses with the right support to help overcome obstacles to success.

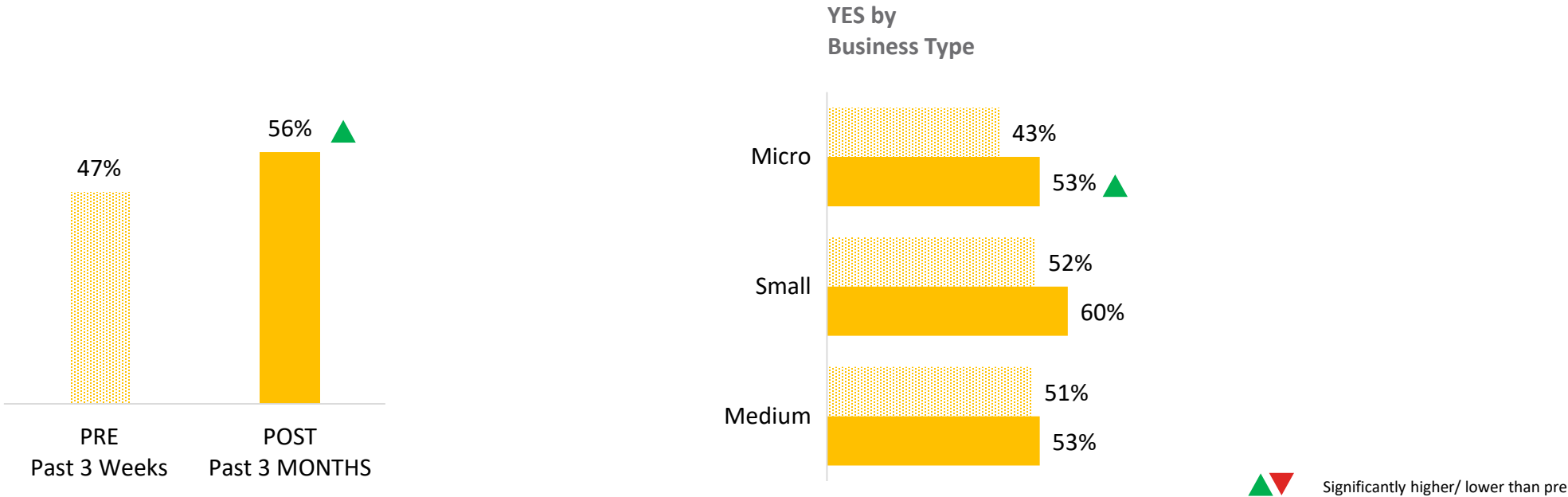


# Unaided Ad Recall Tracking



# Seen, read or heard any advertising from the Government of Canada

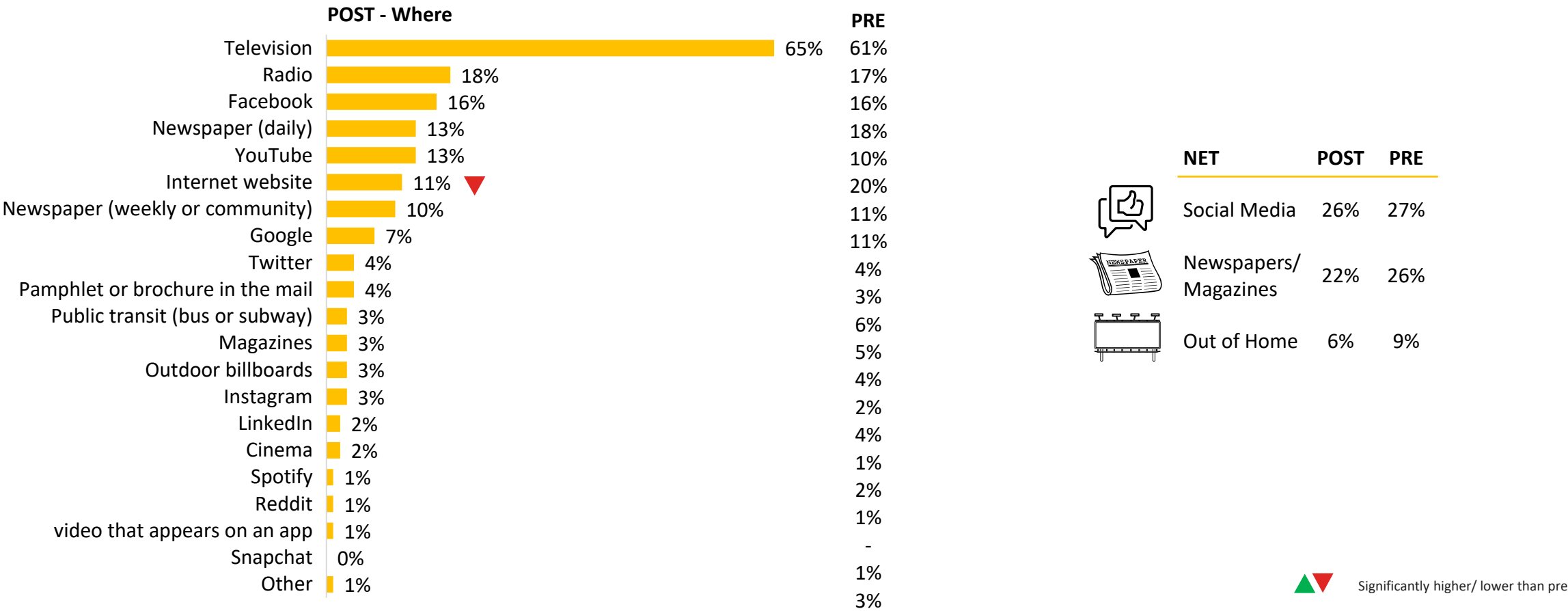
- Over half of respondents claim to recall a Government of Canada ad in the past three months, which is significantly higher than the pre-campaign; this increase is largely driven by micro-business respondents.



Q1. Over the past (Pre) three weeks, Post (3 months) have you seen, read or heard any advertising from the Government of Canada? Base: All respondents n=793

# Where Have you Seen Government of Canada Advertising?

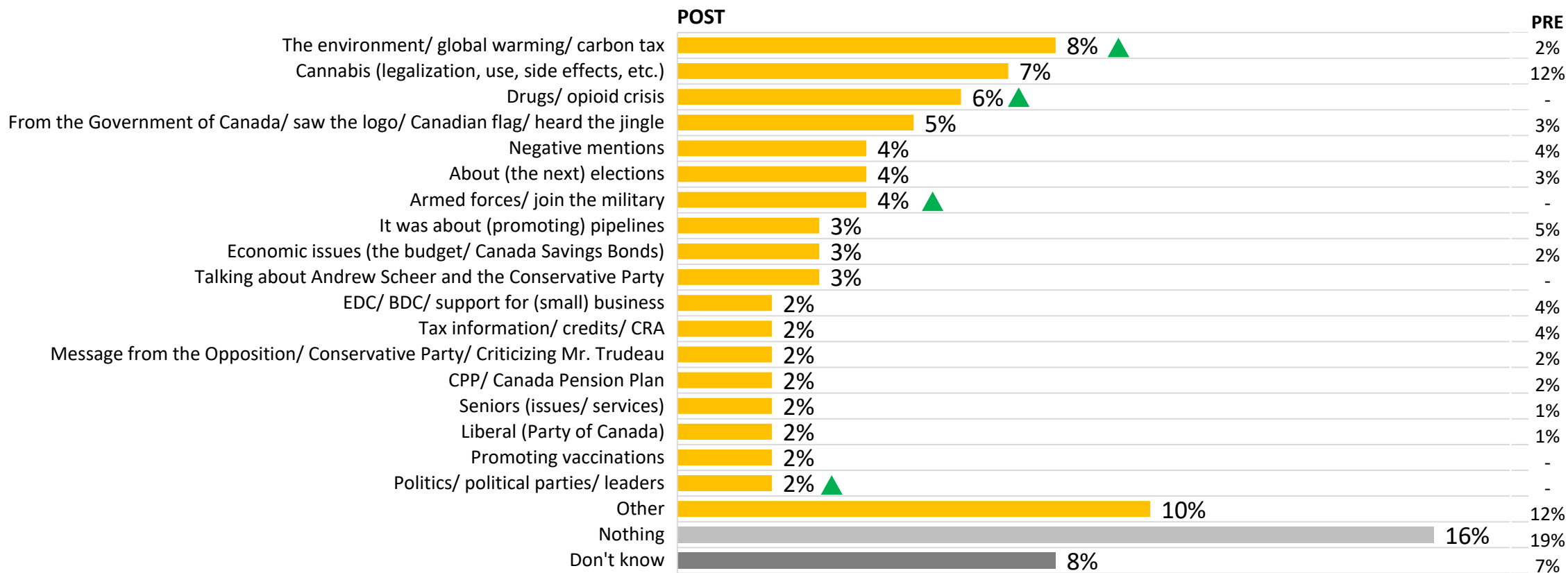
- The majority who recall seeing an ad claim to have seen the ad on television, while a quarter recall ads on social media. There was a decline in the proportion who claim to recall seeing ads on websites.



Q2. Think about the most recent ad from the Government of Canada that comes to mind. Where have you seen, read or heard this ad? Base: Recall Government of Canada ad n=436

# Topic Recalled

- Two percent of those who recall a Government of Canada ad say the topic was about Export Development Canada, Business Development Bank of Canada or support for small business generally, which is lower than pre-campaign. A variety of other topics are recalled, including global warming/carbon tax, cannabis, and the opioid crisis.



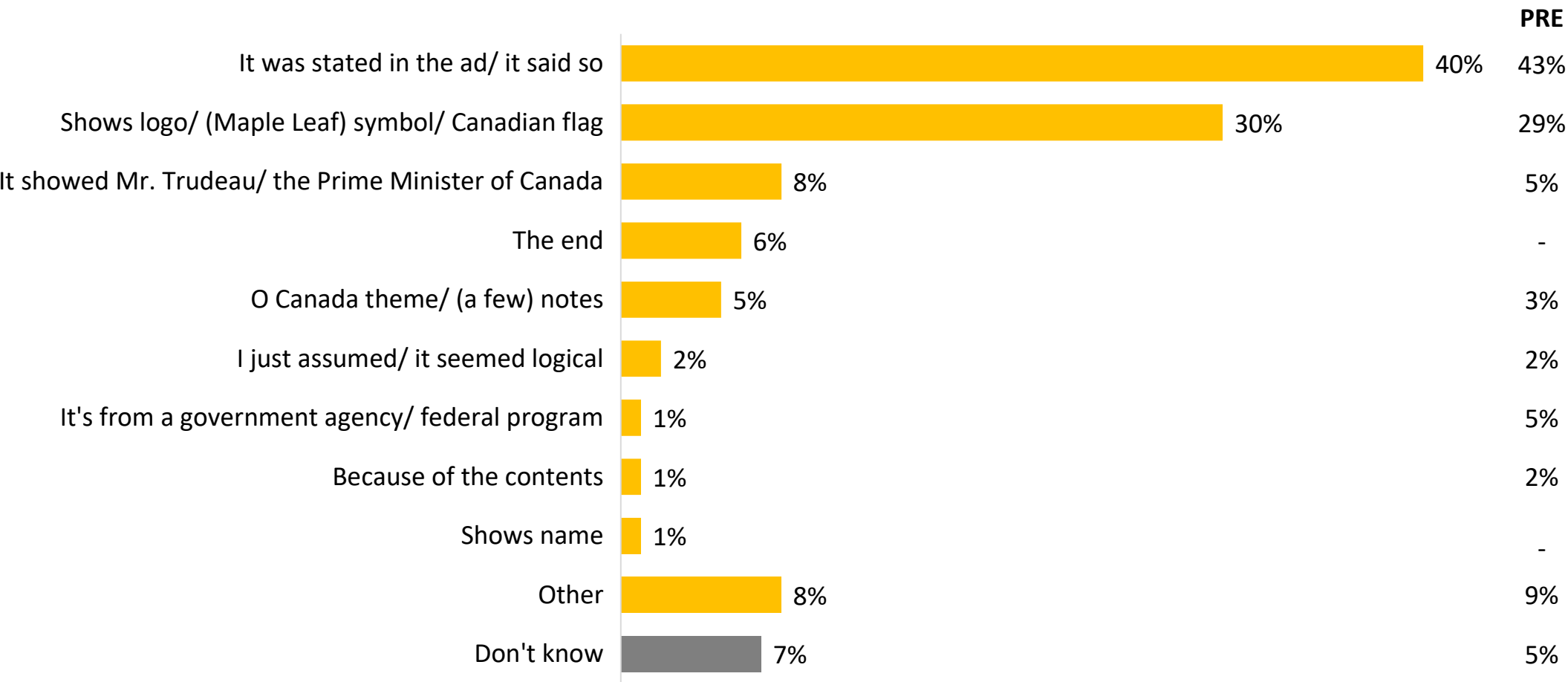
Q3. What do you remember about this ad? Base: Recall Government of Canada ad(Q1=yes) n=436

Mentions under 2% not shown


▲ ▼ Significantly higher/ lower than pre

# Indication Advertising was from the Government of Canada

- Four in ten of those who recall a Government of Canada ad indicate they knew it was a Government of Canada ad because it said so in the ad and three in ten mention the Government of Canada logo or Canadian flag, consistent with pre-campaign mentions.

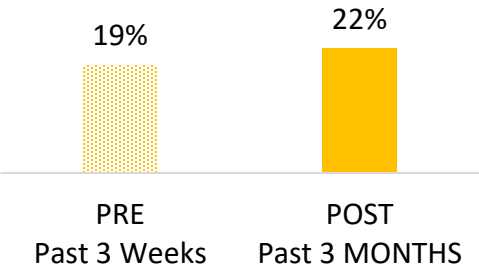


Q4. How did you know that it was an ad from the Government of Canada? Base: Recall Government of Canada ad (Q1=yes) n=436

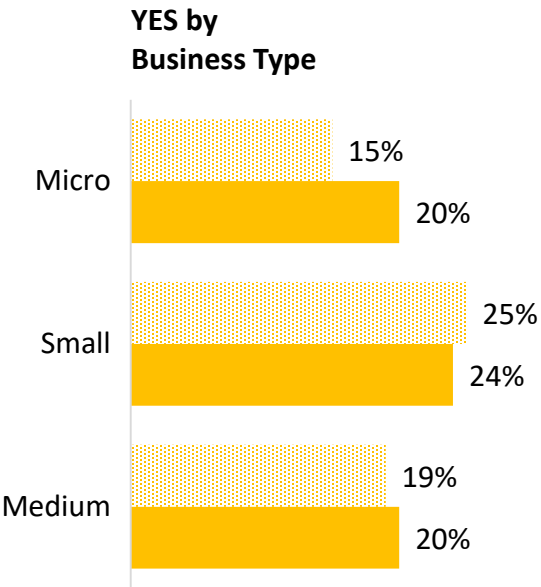
 Significantly higher/ lower than pre

# Unaided Recall: Government of Canada Advertising about Helping Businesses Grow

- Just over two in ten recall a Government of Canada ad about helping businesses grow, which is on par with the pre-campaign – much higher among Science, Technology, Engineering and Mathematics (STEM) (42%) focused businesses and scale-up businesses (37%). While there is no change in the total pre-post populations, those who recall the campaign once exposed to the creative report significantly higher recall than those who did not (63% vs 13%).



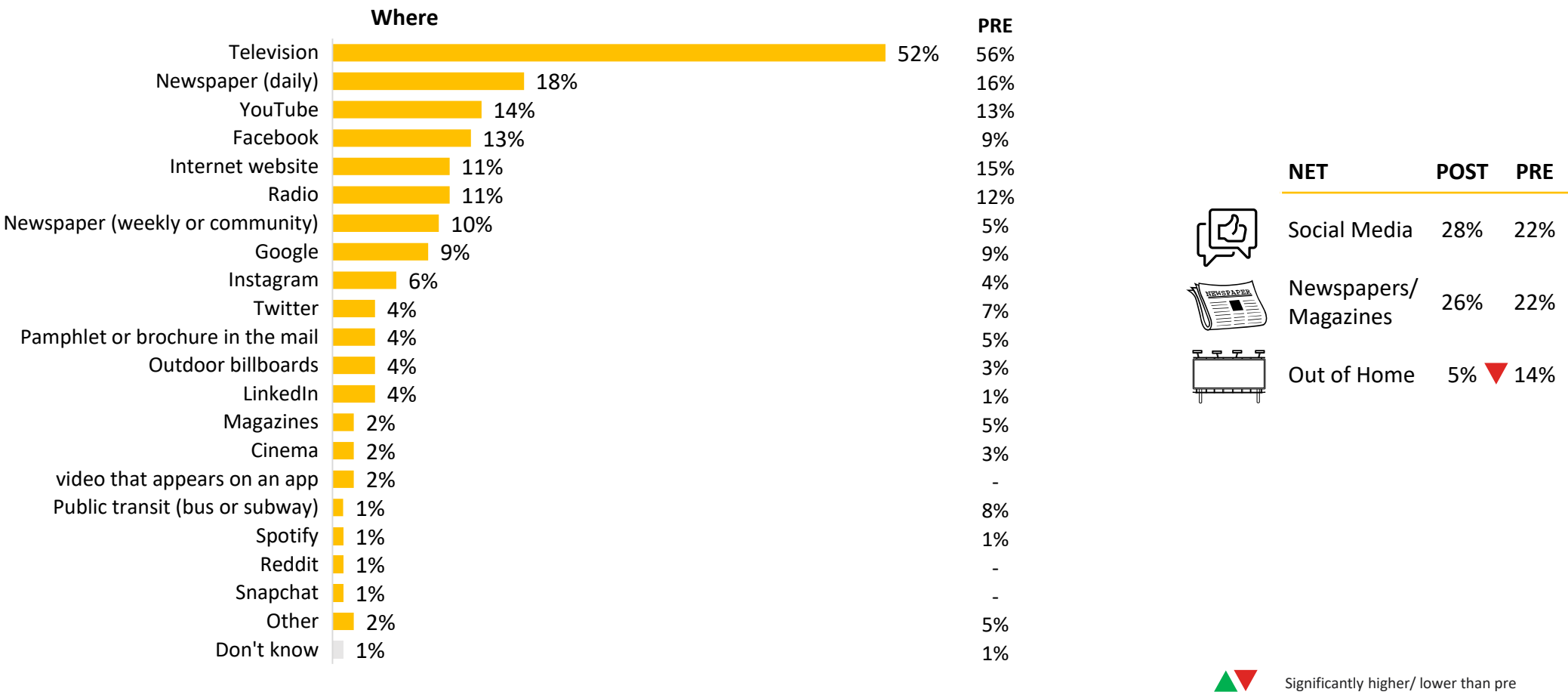
Note, unaided recall refers to advertising awareness that is not linked to a specific ad but rather is asked about “Government of Canada advertising about helping businesses grow”. Whereas campaign recall, which will be shown later in the report, is measuring recall of specific ISED ads that were shown to respondents. This is a mandated methodology of the Advertising Campaign Evaluation Tool (ACET).



T1a. Over the past three weeks, have you seen, read or heard any Government of Canada advertising about helping businesses grow? Base: All respondents n=793

# Where Respondents Recall Seeing Helping Businesses Grow Ad

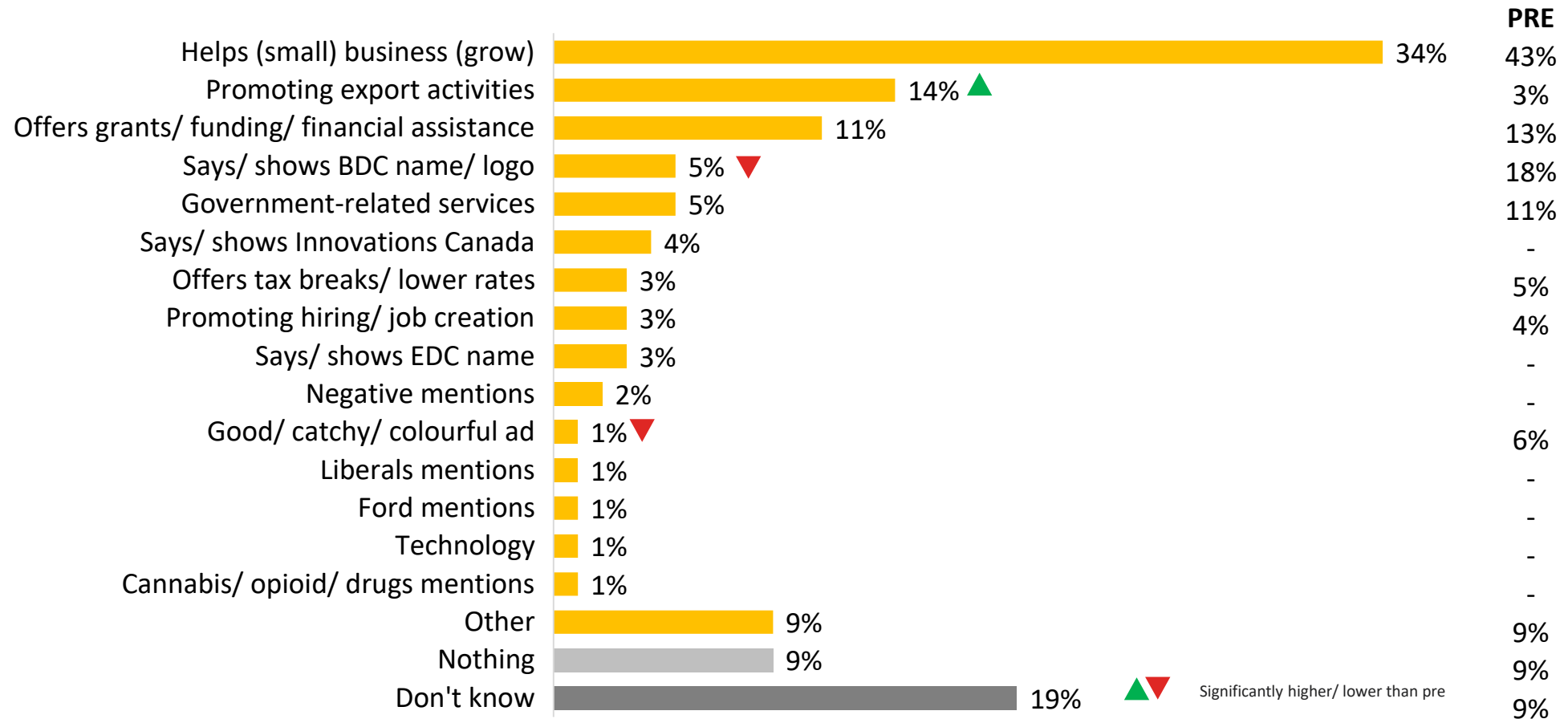
- Consistent with pre-campaign, half of those who recall a Government of Canada ad about helping businesses grow claim to have seen it on TV. Three in ten mention they saw it on social media, and one in four mention newspaper or magazines.



T1b. Where have you seen, read or heard this Government of Canada ad about helping businesses grow? Base: T1A=Yes n=166

# Government of Canada Ad Helping Business – Specific Topic Recalled

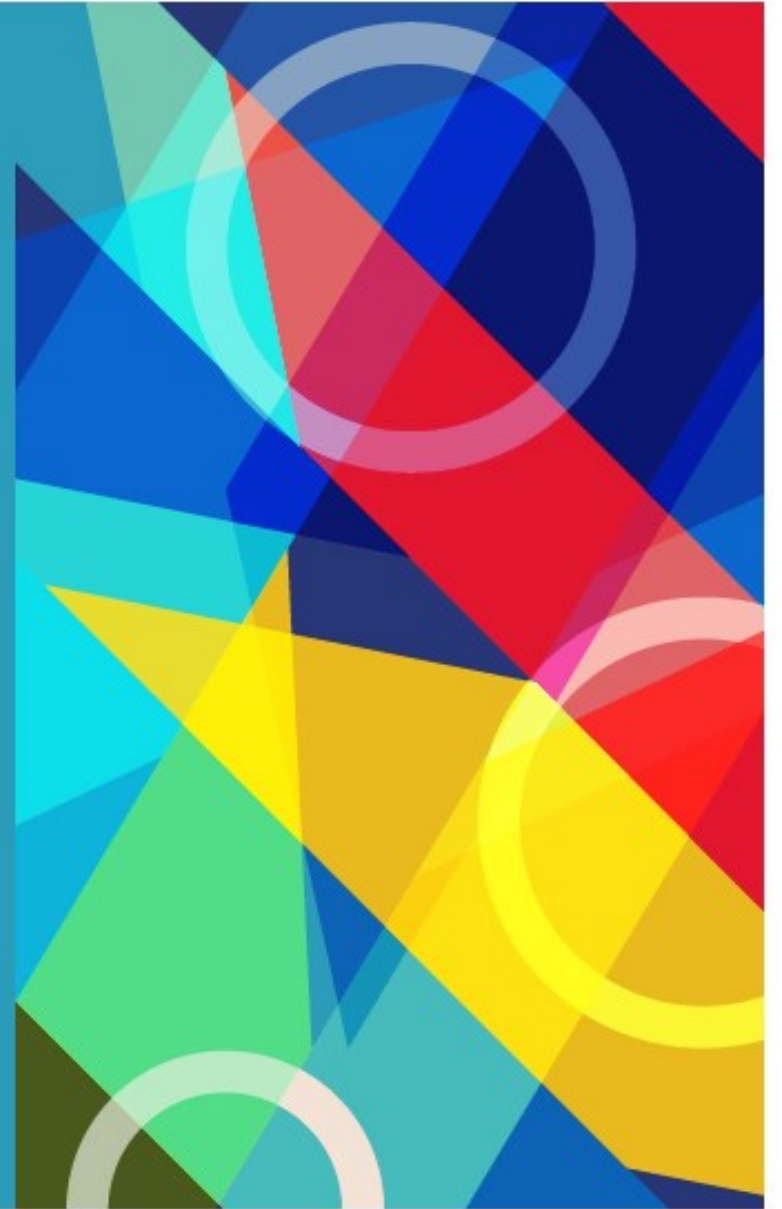
- While the largest proportion of respondents say they simply remember the ad was about helping small businesses grow, there was a significant increase in those saying it was promoting export activities (could be confusion with EDC advertising), and fewer claiming it said or showed the BDC name or logo.



T1c. What do you remember about this ad? Base: T1A=Yes n=140



# Campaign Recall

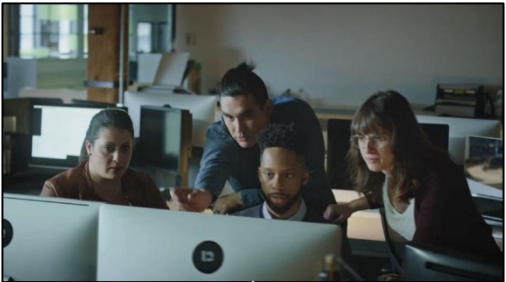


# Campaign Recall and Ad Testing

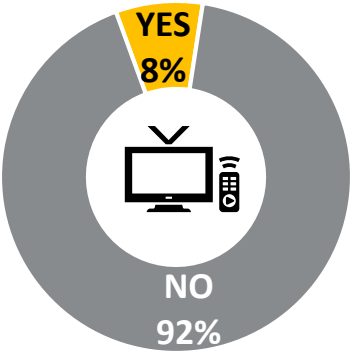
- Respondents were shown four advertisements promoting [innovation.canada.ca](http://innovation.canada.ca):
  1. Television ad
  2. LinkedIn ad designed for women entrepreneurs
  3. Digital banner ad
  4. Print ad
- The order in which the ads were presented was randomized and recall (“Over the last three months, have you seen this ad?”) was asked of each respondent for each of the four ad creatives.
- If respondents were aware of an ad, they were asked where (in which media) they had seen the ad.
- All respondents (whether they recalled ads or not) were asked the main point they thought the ad campaign as a whole was trying to get across; this assessment was completed through the use of ad diagnostics using an agreement scale (e.g., these ads catch my attention, these ads are relevant to me).

# Ad Awareness

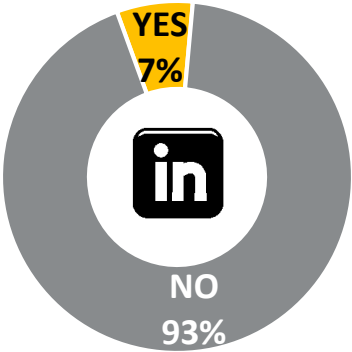
- Awareness was highest for the TV and LinkedIn ads, and marginally lower for the banner and print ads.



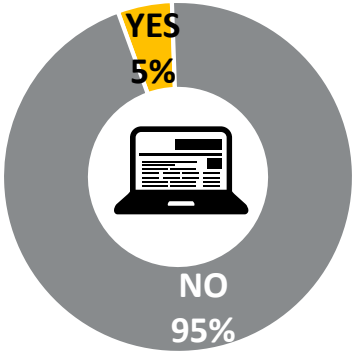
TV Ad



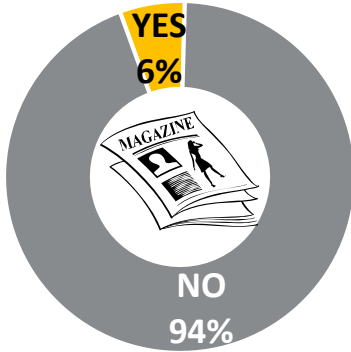
LinkedIn Ad



Digital Banner



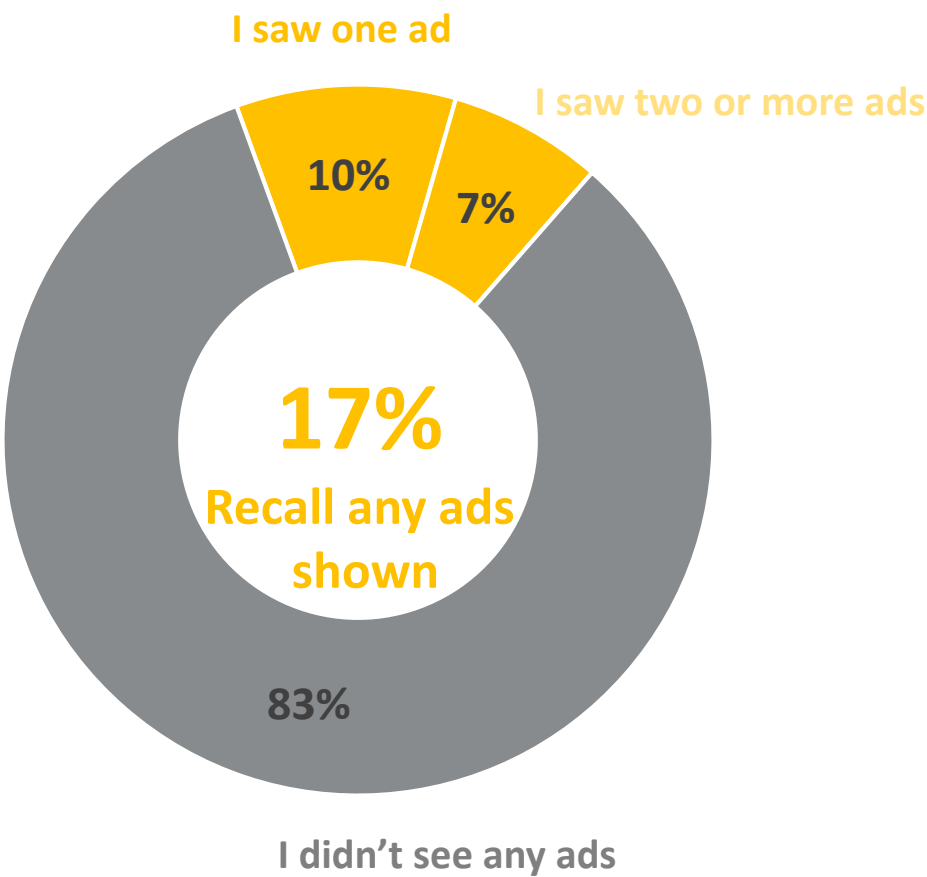
Print Ad



T18D a-d. Over the past three months, have you seen this ad? Base: All respondents n=793

# Overall Campaign Recall

- Just under two in ten respondents saw at least one of the four ads shown, with one in ten seeing just one ad, and 7% reporting they saw 2 or more. Campaign recall is significantly higher among small business (22%) respondents compared to micro (13%). Audiences may not distinguish between government entities that support businesses. 22% recalled the campaign (unaided) vs. 17% when presented with sample ads. Multiple campaigns for businesses (BDC, EDC) were in market at the same time.

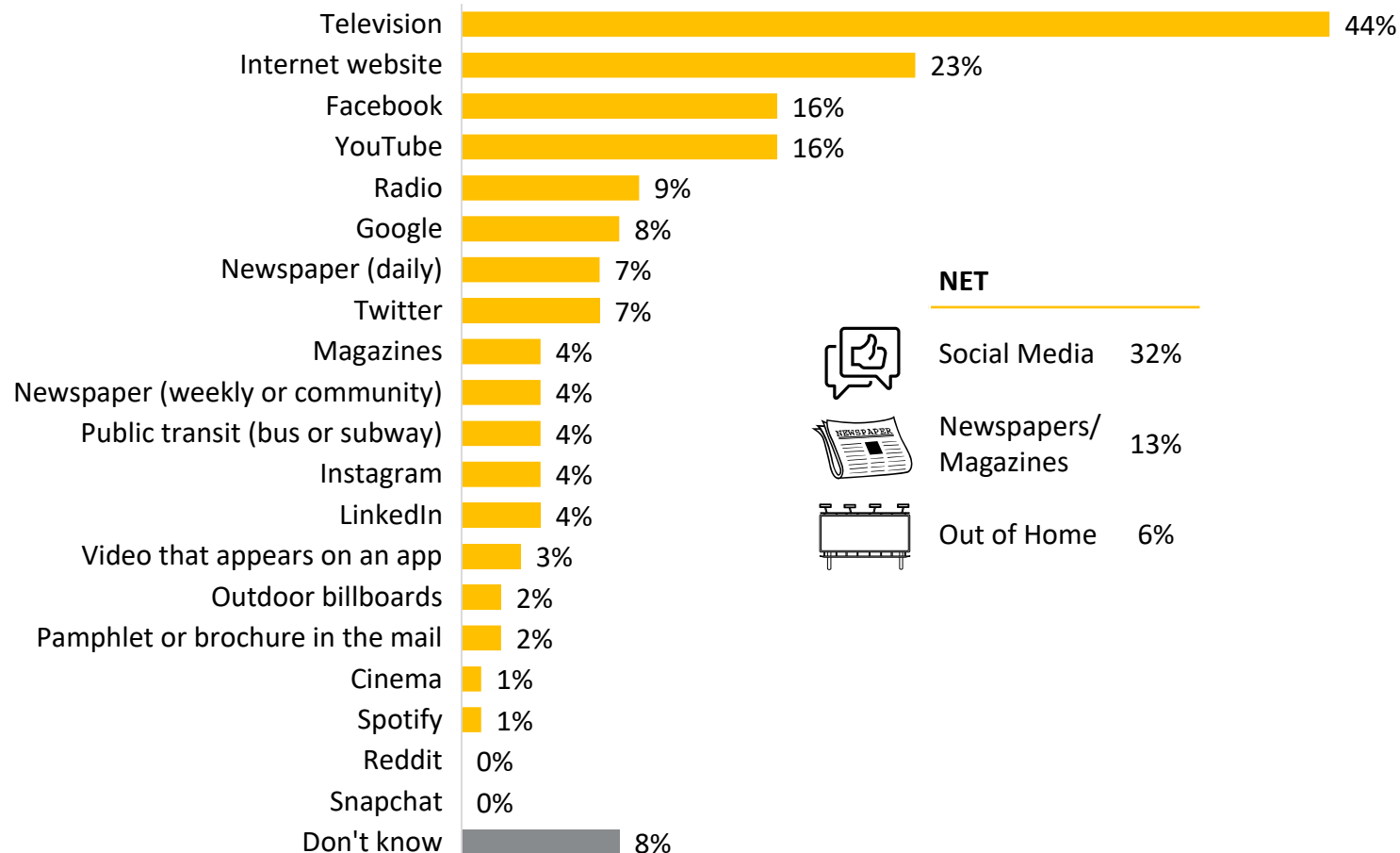


T18D a-d. Over the past three months, have you seen this ad? Base: All respondents n=793

# Where SMEs Saw, Read or Heard Advertisements

- Among those who saw an ad, four in ten say they saw an ad on TV, three in ten say they saw an ad on social media and nearly one in four say they saw an website ad.
- Based on ISED's marketing plan, TV and YouTube videos were used to increase awareness of the innovation.canada.ca website portal. When we look at internal web metrics and advertising data, we see that TV had more than 112 million impressions which in turn brought greater awareness to innovation.canada.ca.
- Web banners were not intended to increase awareness, but with more than 43 million impressions they proved to be an effective tactic for awareness as well as drive to site.
- A combination of tactics increased awareness and drive to site, though TV helped increase time spent on site.
  - The first phase of the campaign saw more than 100,000 "stories" \* completed with TV and digital mix.
  - The second phase of the campaign saw 66,000 stories completed with digital-only tactics in market.

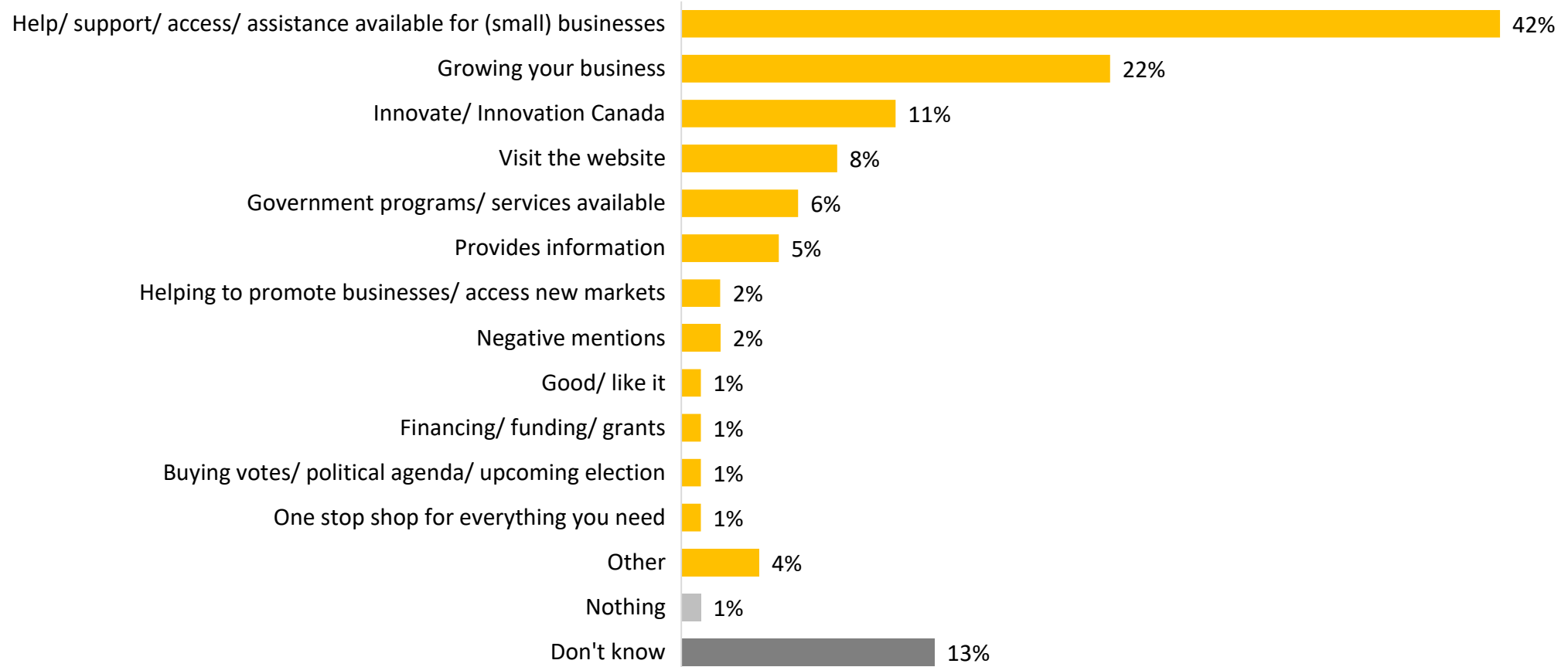
*\* A "story" is the result of a series of questions that the user answers on innovation.canada.ca in order to provide them with a list of government programs and services relevant to their needs.*



T11. Where have you seen, read or heard these ads? Base: Saw any ad n=135

# Main Point of Advertising

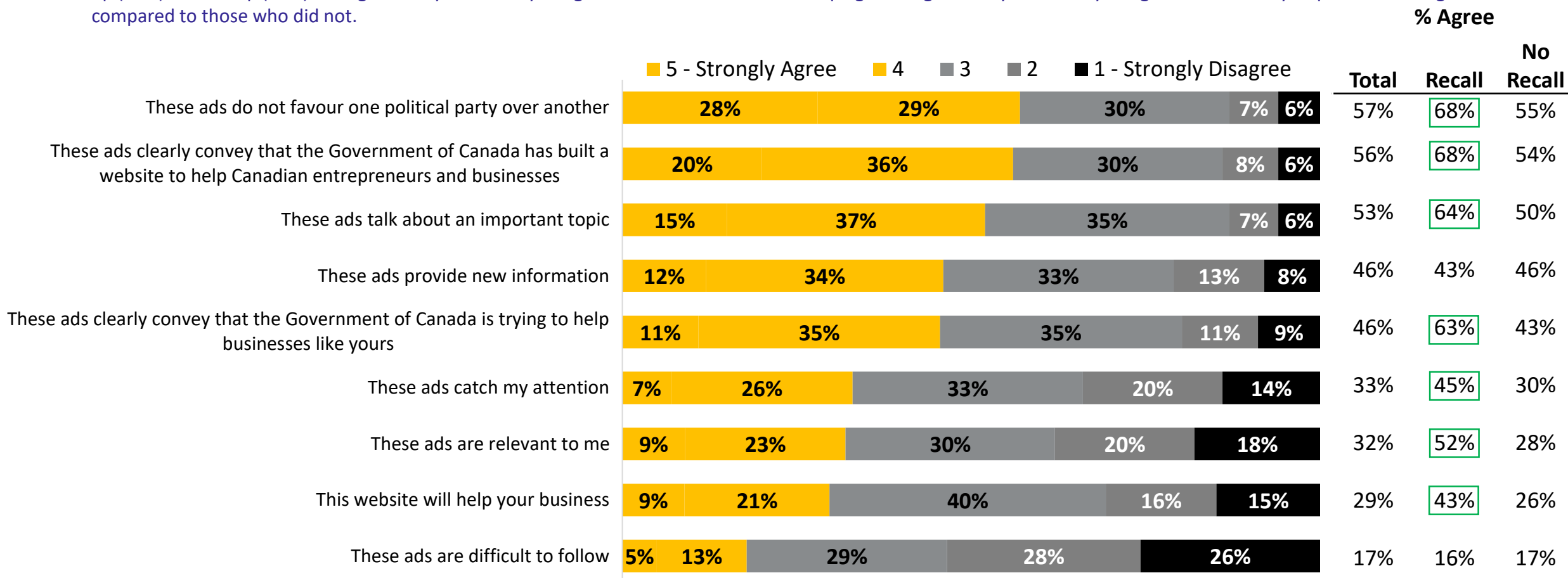
- The message of the ads came through well, with most of the mentions by respondents being related to the campaign. The most frequent mention was help/support available for small businesses, followed by growing your business, and Innovation Canada.



T1J. What do you think is the main point these ads are trying to get across? All respondents n=793

# Advertising Diagnostics

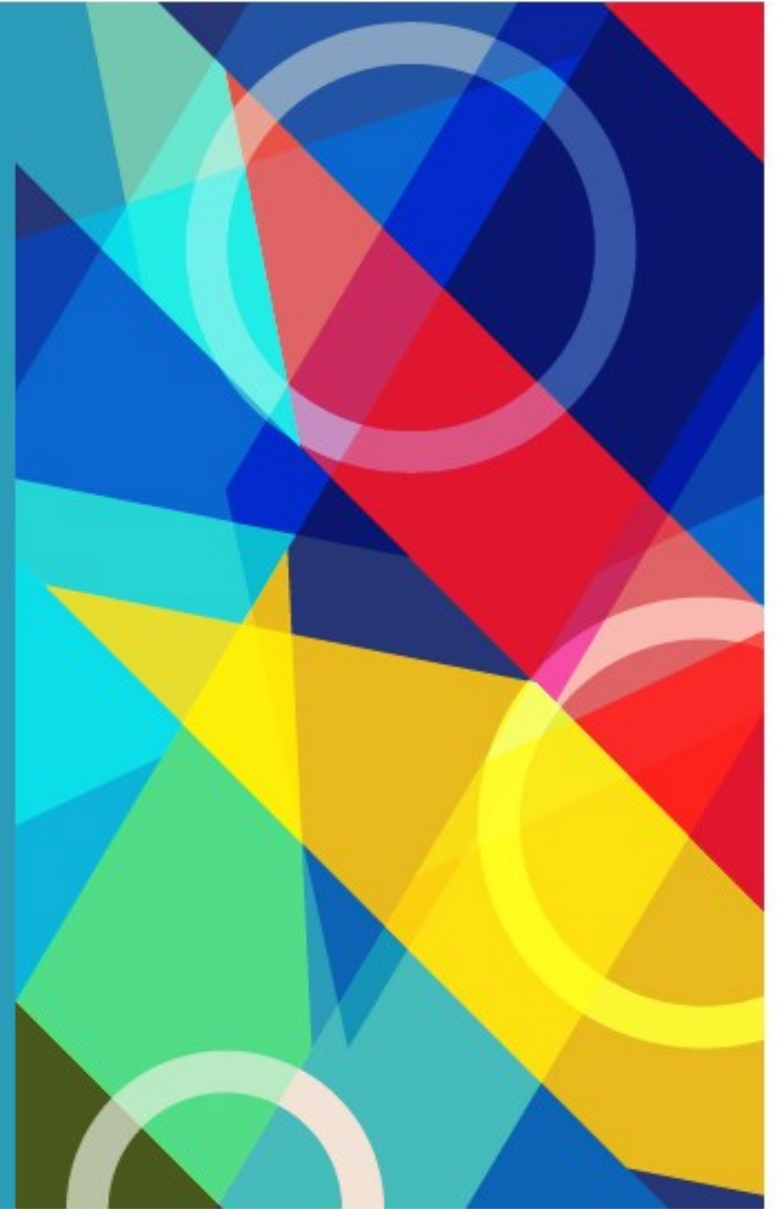
- Over half (56%) of respondents agree these ads clearly convey that the Government of Canada has built a website to help Canadian entrepreneurs and businesses, with this being significantly higher among those who identify their business as a start-up (75%) or a women-led business (70%). Just under half (46%) agree these ads clearly convey that the Government of Canada is trying to help businesses like yours, which significantly outweighs those who disagree (20%). Those who identify their business as a scale-up (64%) or start-up (61%) are significantly more likely to agree. Those who recall the campaign are significantly more likely to agree with virtually all positive ad diagnostics compared to those who did not.



T1K. Please indicate your level of agreement with the following statements about these ads. Base: All respondents n=793

68% Indicates significantly higher difference between sub groups

# Use of [innovation.canada.ca](http://innovation.canada.ca)





# Where to go for information about helping your business

- Half of all respondents report they'd know where to find information about Government of Canada programs that could help their business, which is on par with the pre-campaign. However, this did decline among small and medium business respondents. Positively, those who recalled the campaign are significantly more likely to report they'd know where to go compared to those who did not recall the campaign (81% recall vs. 47% no recall).

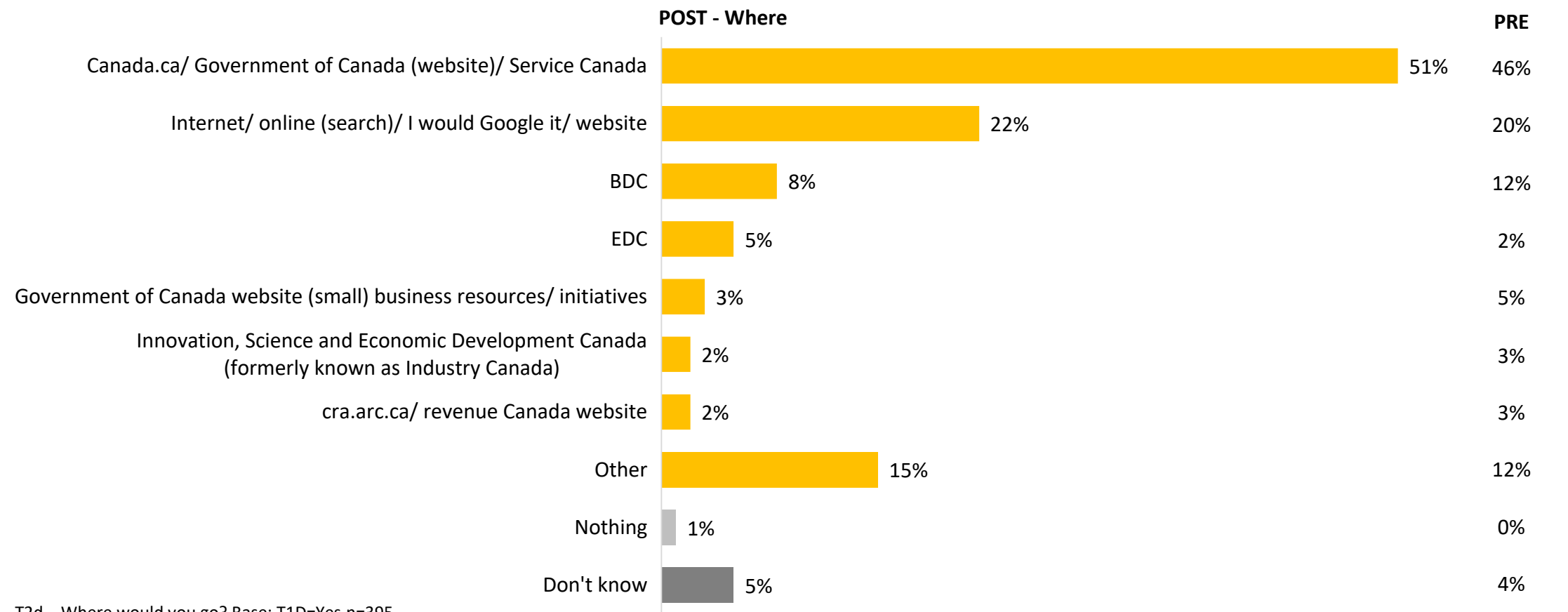


▲ ▼ Significantly higher/ lower than pre

T1d . Would you know where to find information about Government of Canada programs that you could access to help your business? Base: All respondents n=793

# Where to go for information about helping your business

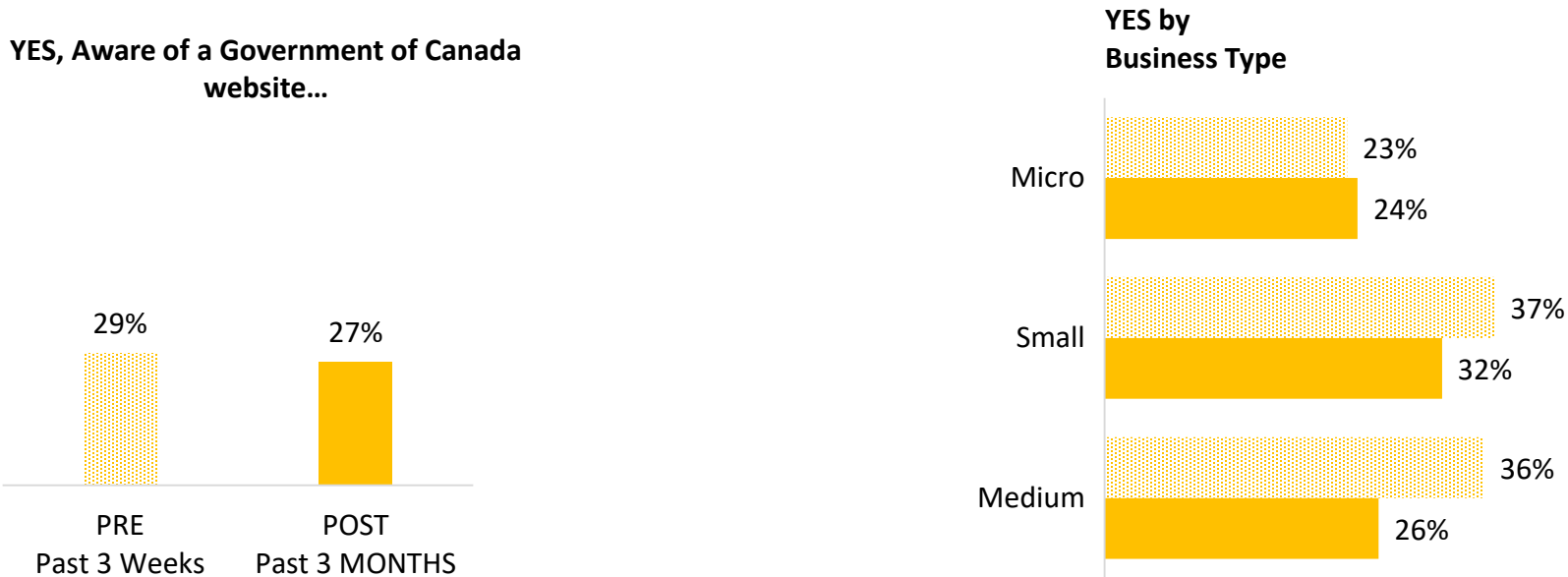
- Consistent with pre-campaign, about half of respondents who indicated they would know where to find information about Government of Canada programs to help their business say they would go to Canada.ca or the Government of Canada website and two in ten say they would use a Google or internet search. Just under one in ten mention BDC, and 5% mention EDC.



T2d. Where would you go? Base: T1D=Yes n=395

# Unaided Recall of innovation.canada.ca

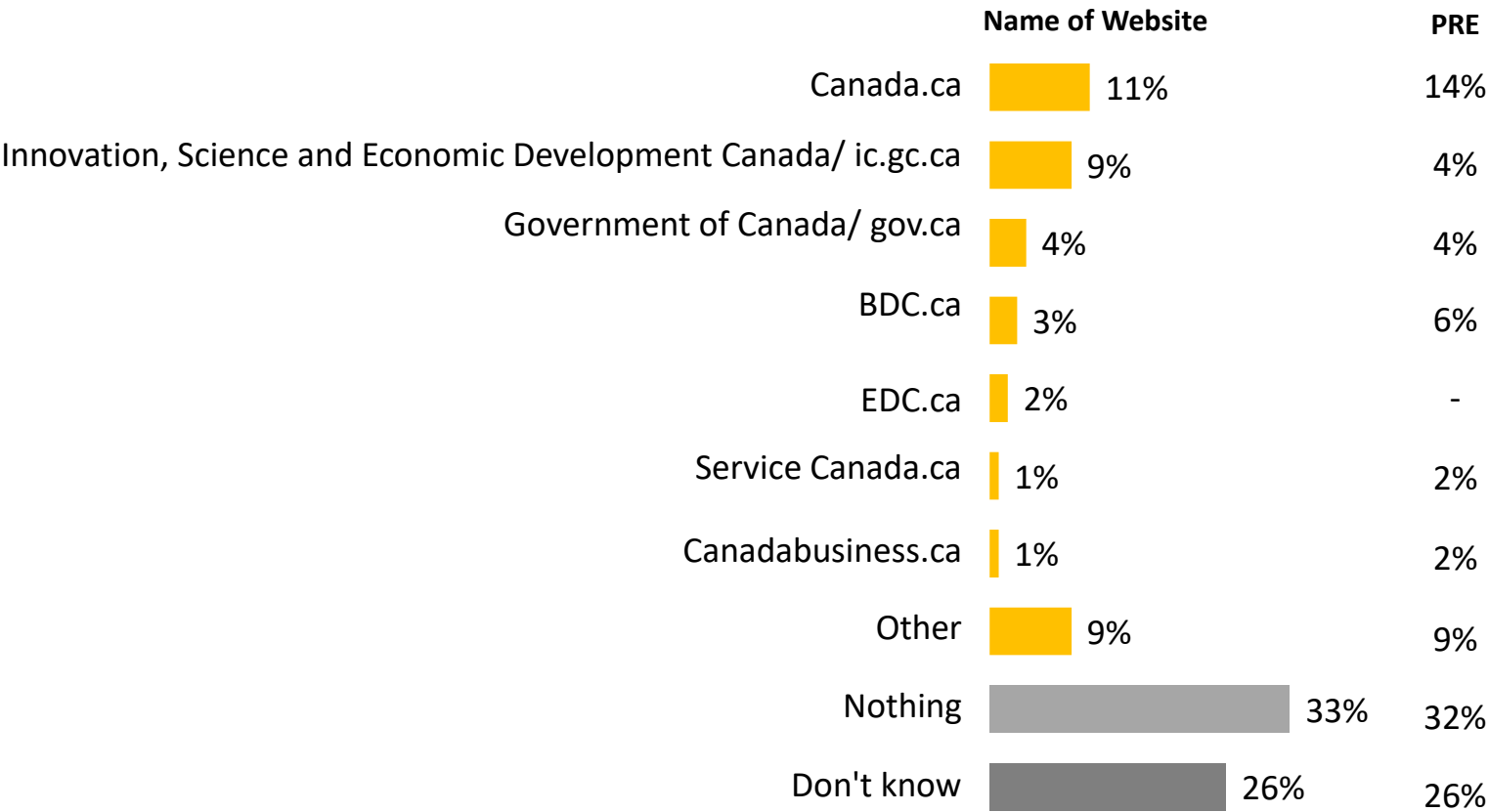
- Awareness that the Government of Canada has built a website to help Canadian entrepreneurs and businesses is consistent at roughly three in ten. Those who recalled the campaign were nearly three times as likely to be aware (61% recall vs. 21% no recall), with awareness being even higher among those who recalled two or more ads from the campaign (71%).



T3d. The Government of Canada has built a website designed to help Canadian entrepreneurs and businesses find government help for business in one location. It provides a variety of information, including details about funding and loans as well as expert advice and support tailored to your specific business needs. Before today, were you aware of this website?... Base: All respondents n=793

# Unaided Recall of innovation.canada.ca

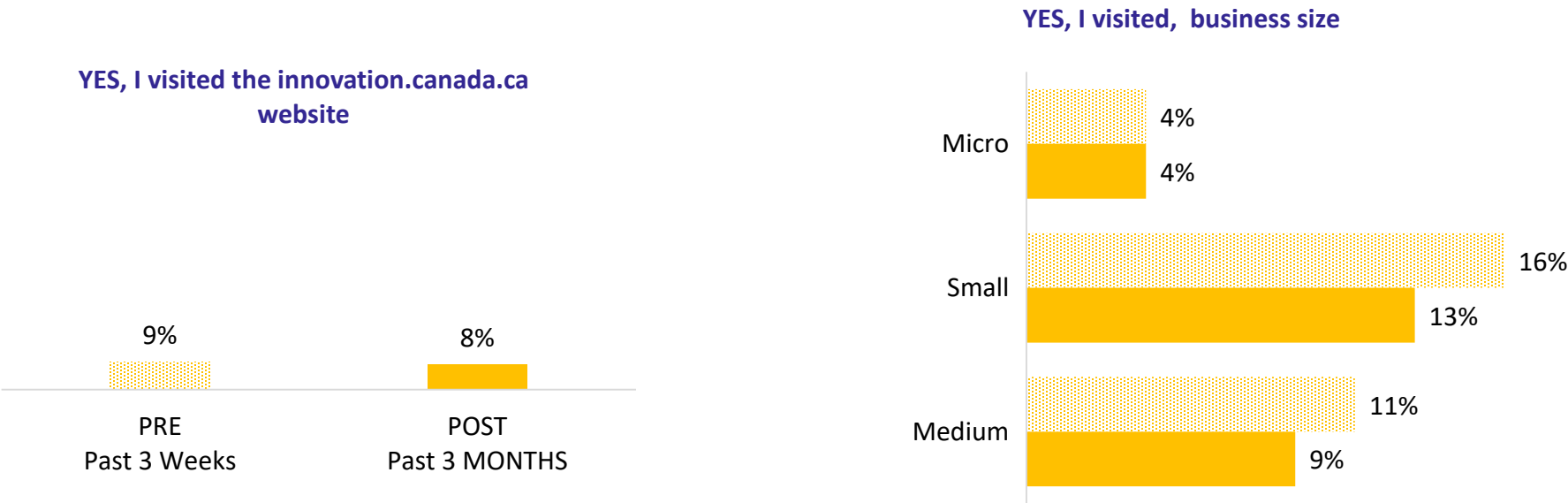
- There has been a 5% increase in those attributing the name of the website to ISED or ic.gc.ca, while under 1% of respondents specifically name innovation.canada.ca.



T4d. Do you remember the website? Please type it below. Base: T3D=Yes n=220

# Visited innovation.canada.ca

- Consistent with pre-campaign, roughly one in ten respondents say they've visited innovation.canada.ca. Those who recalled the campaign were significantly more likely to have visited the site compared to those who did not (31% recall vs. 4% no recall), and half of those who recalled two or more ads say they have. Scale-up businesses are also more likely to have visited the site (25%). Based on ISED's internal metrics, during the time the campaign ran (February 18 to June 2, 2019), the campaign achieved more visits to the site in fifteen weeks than the site achieved alone in one year, and increased the number of monthly unique web visits by 289%.



T5d. The website we are talking about is innovation.canada.ca, have you visited the website before today? Base: All respondents n=793

## 2. Business Outlook

## BUSINESS OUTLOOK

- The qualitative phase provided a strong indication that the issue weighing most heavily on the minds of SMEs is how to scale up effectively. While starting up is a challenge, the struggle to scale up is tougher. This was validated in the quantitative where scaling up was found to be among the top areas that SMEs want the Government of Canada to prioritize.
- These discussions also revealed that access to financing, and supports and advice in building a customer base are the fundamental barriers for scaling-up.
- Accessing financing is a common preoccupation among SMEs and may cause them to focus more strongly on what financing the Government of Canada can provide, while overlooking the programs and services available to help them to access more financing than government loans alone. Also for this reason, SMEs may overlook the utility of the government programs in helping provide advice and support in building a customer base.
- Future advertising should make a stronger effort to couple any messaging around financial support with tangible examples of the value of advice to guide businesses looking to grow their client base and scale up effectively. It is not just about the money, it is also about how best to use the money once you get it.
- In terms of both messaging and tone, the research found that business advertising may be over-using the word technology and references to tech. Many SMEs do not see themselves as a tech company even though they may be using new technology in their business. Future campaign concepts should have an option where the tone is not solely focused around tech.

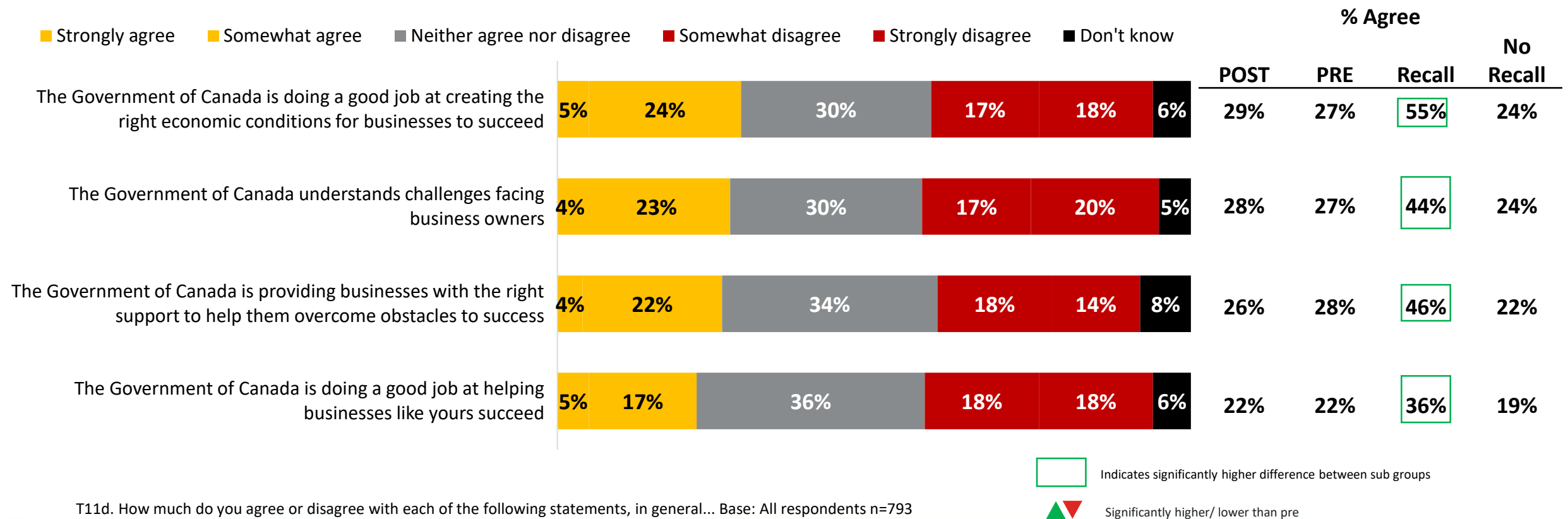
## BUSINESS OUTLOOK - continued

- In terms of what the Government of Canada should emphasize to support SME businesses in Canada, having a competitive business tax regime was found to be a top priority, followed by helping businesses ready to scale up and grow access financing, making it easier to find the right government programs for your business and encouraging Canadian businesses to innovate. There was only modest variation between types of support that SMEs believe the Government of Canada should emphasize, suggesting all areas require some degree of support.
- Competitive business tax regime is likely a key focus for several reasons, but of note, it is one of the areas where SMEs rate the performance of the Government of Canada relatively lower, as is helping businesses ready to scale up and grow access financing. However, those who recall the campaign rate government performance significantly more positively in virtually all areas, including those deemed most important by a majority of businesses.
- Reduced regulations/red tape, as well as access to financing were found to be ways in which SMEs feel the Government of Canada can most help businesses. This was followed by improved access to talent/skilled workforce.



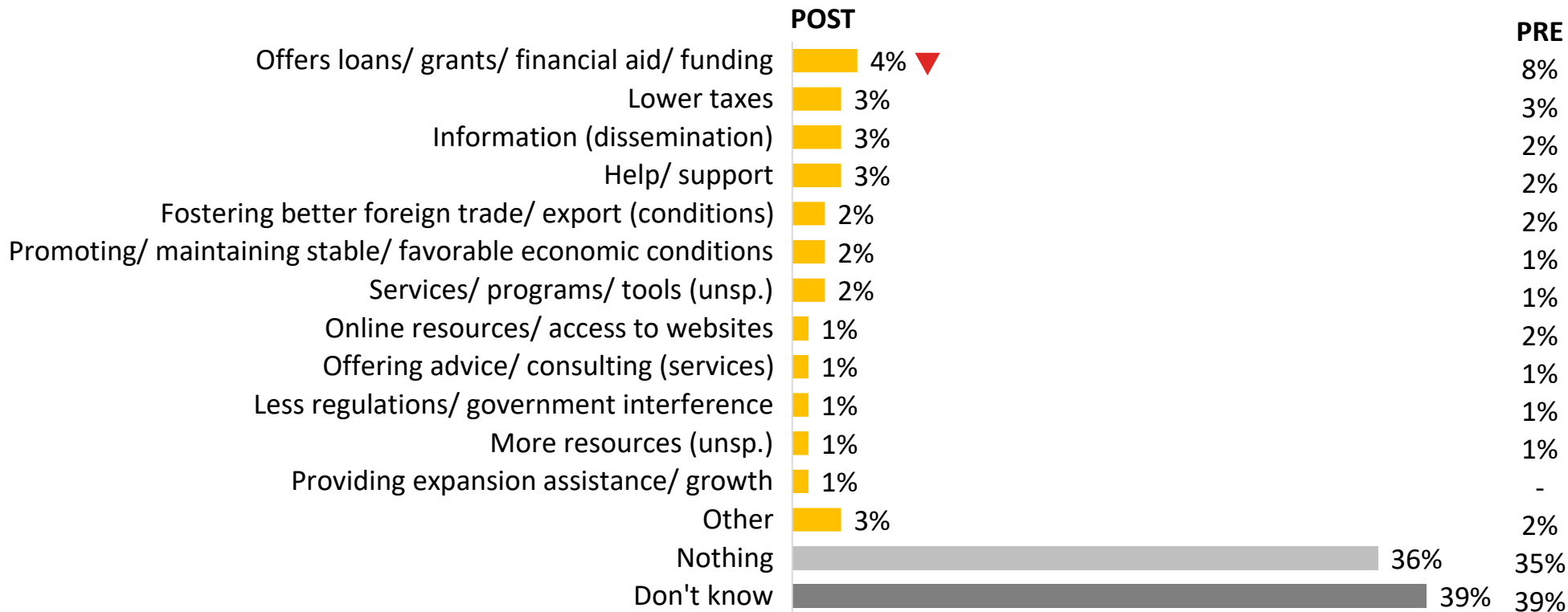
# Impressions of Government of Canada support for SMEs

- There has been little change from the pre-campaign on impressions of government support for entrepreneurs and businesses, with impressions remaining mixed. Roughly three in ten believe the government is performing well in the various areas asked about, while as many or more disagree, and three in ten offer a neutral rating. However, those who recalled the campaign have a significantly more positive impression of the Government of Canada’s support than those who did not, particularly on doing a good job at creating the right economic conditions for businesses to succeed, with a thirty-point gap between those who recall and those who do not.



# What the Government of Canada is doing right for businesses....

- Those who recalled 2 or more ads were more likely to have a more positive assessment of what the Government of Canada is doing right, including: Offer loans/grants/funding (14% vs. 3% no recall) and Help/support (12% vs. 3% no recall). Consistent with the pre survey, four in ten businesses do not know what the Government of Canada might be doing right, and nearly as many believe the Government of Canada is not doing much right to help businesses succeed. There has been a significant decline in those mentioning offering loans/grants/funding as something the Government of Canada is doing right (8% to 4%).



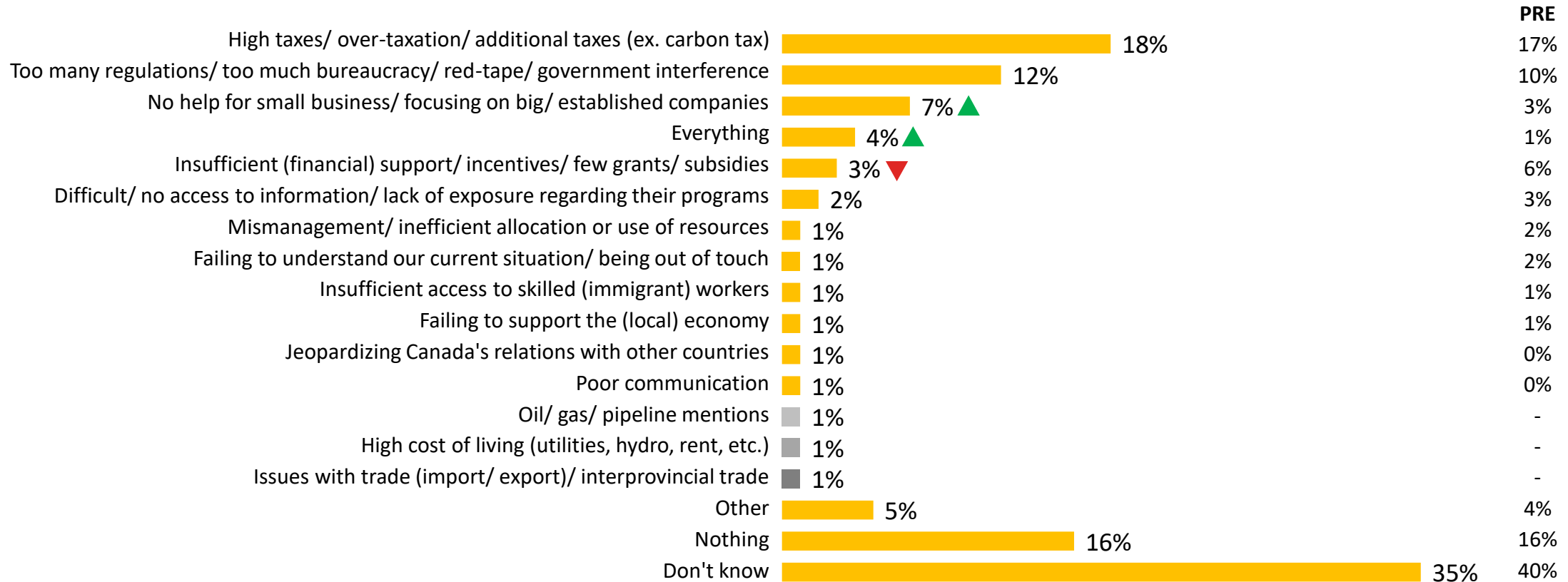
T12d. What is the Government of Canada doing right when it comes to helping businesses succeed? Base: All respondents n=713



Significantly higher/ lower than pre

# What the Government of Canada is doing wrong for businesses....

- High taxes/over-taxation and too many regulations/red-tape remain the top mentions for what the Government of Canada is doing wrong. While no help for small businesses/focusing on big/established companies increased, and this is actually higher among those who recalled the campaign than those who did not (15% vs. 6% no recall).

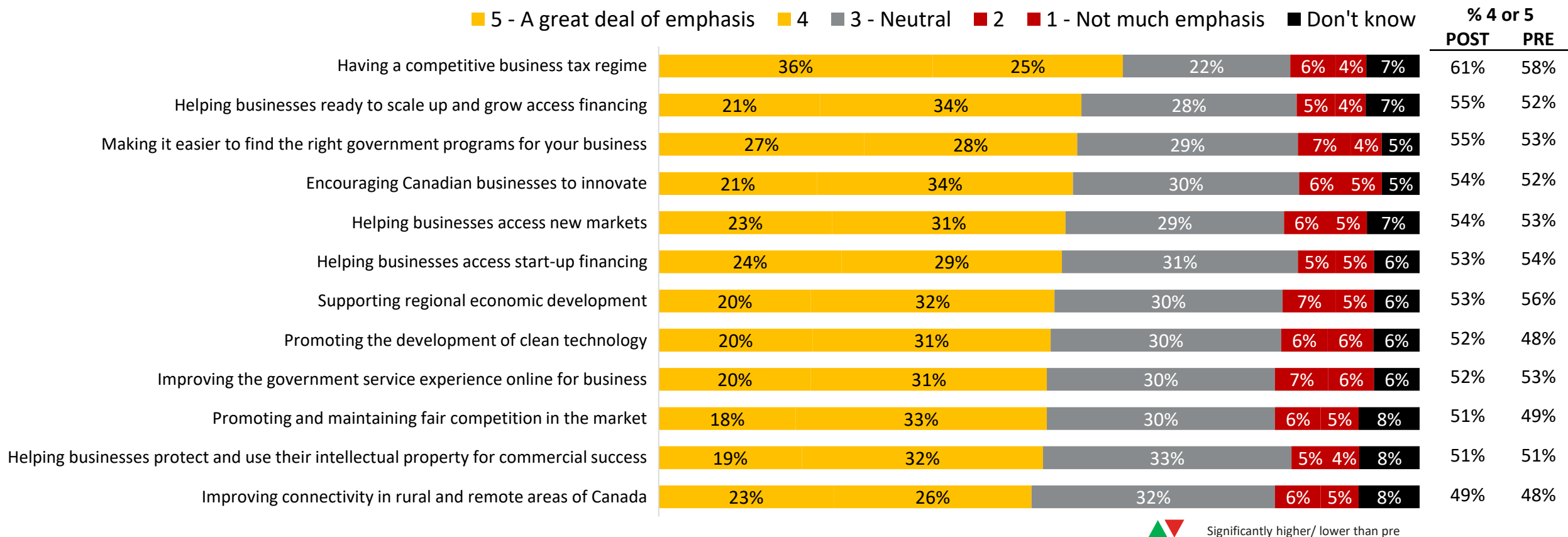


T13d. What is the Government of Canada doing wrong when it comes to helping businesses succeed? Base: All respondents n=713

▲ ▼ Significantly higher/ lower than pre

# How SMEs want the Government of Canada to support them

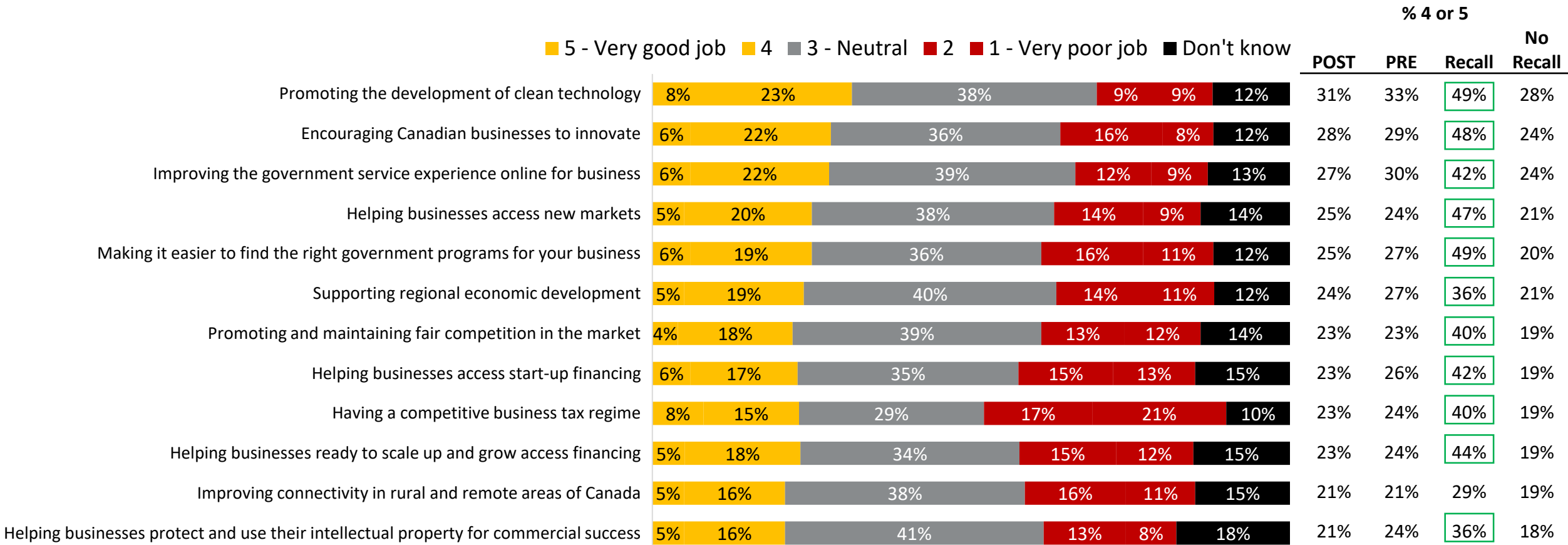
- There continues to be only modest variation between the types of support SMEs believe the Government of Canada should emphasize, suggesting all require some degree of emphasis. SMEs put the greatest emphasis on having a competitive business tax regime, with over a third putting a great deal of emphasis on this.



T15d. The Government of Canada has identified several priorities to support businesses in Canada. For each of the following, please indicate how much emphasis you think should be placed on that area. Base: All respondents n=793

# How well the Government of Canada is performing in these areas

- There is little change from pre-campaign on how SMEs rate the Government of Canada's performance, with higher ratings in areas of less importance to a majority of businesses, such as promoting clean tech, and lower in areas of greater importance such as having a competitive tax regime. Those who recall the campaign have significantly more positive perceptions of how the Government of Canada is doing in virtually all areas.



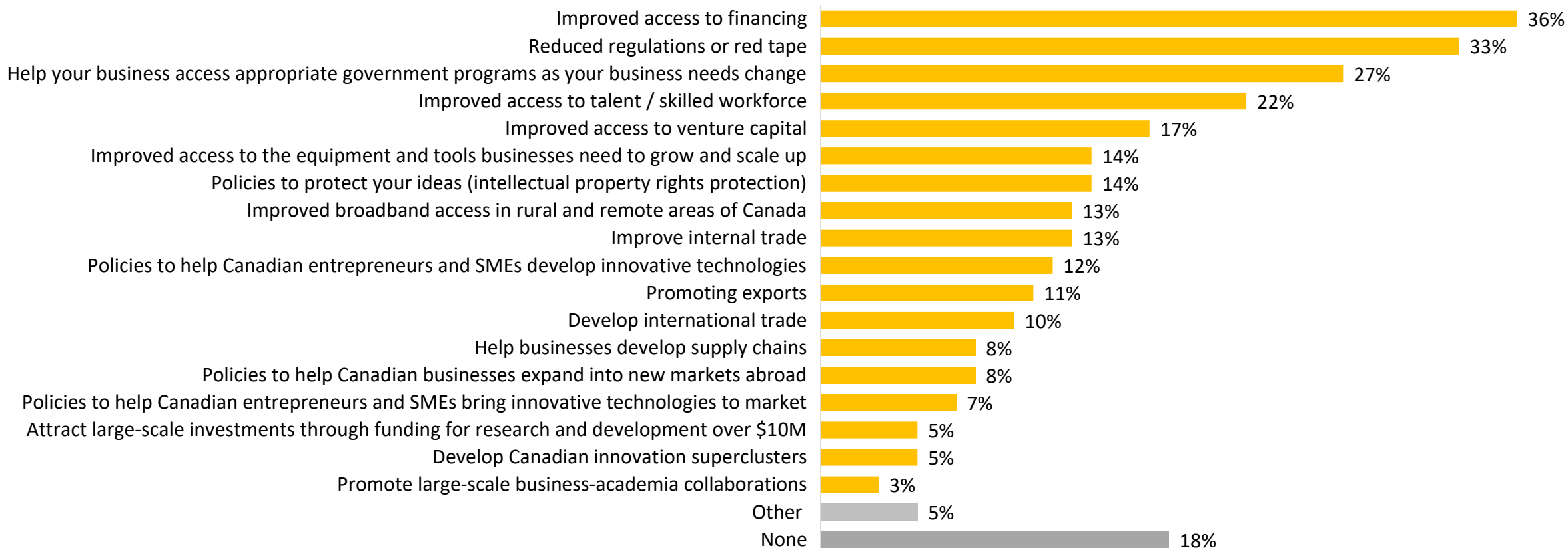
T16d. How would you rate the performance of the Government of Canada in each of these same areas: Base: All respondents n=793



Indicates significantly higher difference between sub groups  
Significantly higher/ lower than pre

# Priorities Most Beneficial to Business

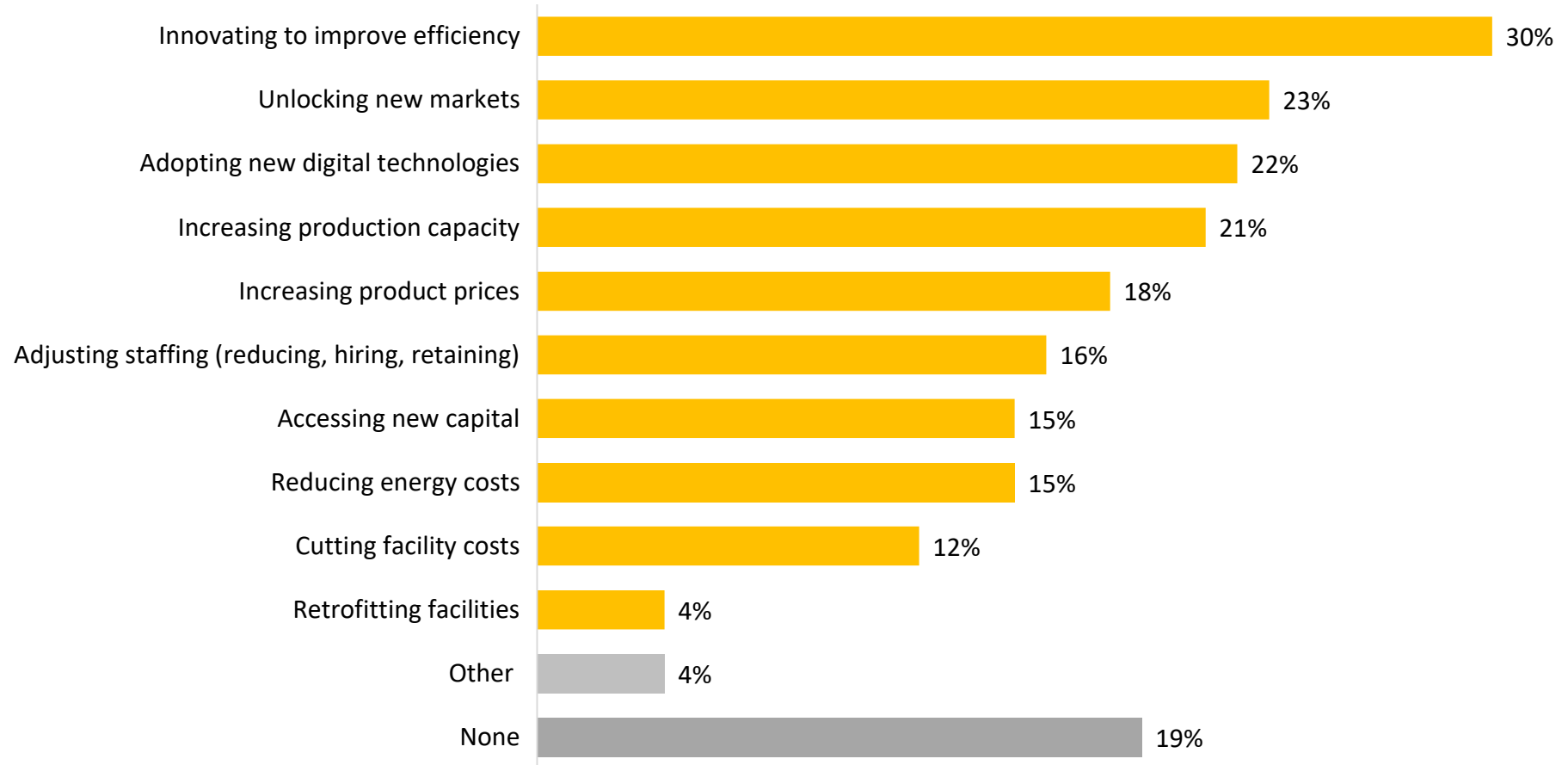
- Of the priorities the Government of Canada identified to support Canadian businesses, improved access to financing, reduced regulations/red tape and help accessing government programs as business needs change came out on top for what SMEs think will be most beneficial to their business.



T6D. The Government of Canada has identified potential priorities it can pursue to support businesses in Canada. Which would be most beneficial to your business? (Select up to five)  
Base: Post-Campaign Survey All respondents (n=793)

# Solutions to Business Challenges – Increasing Profitability

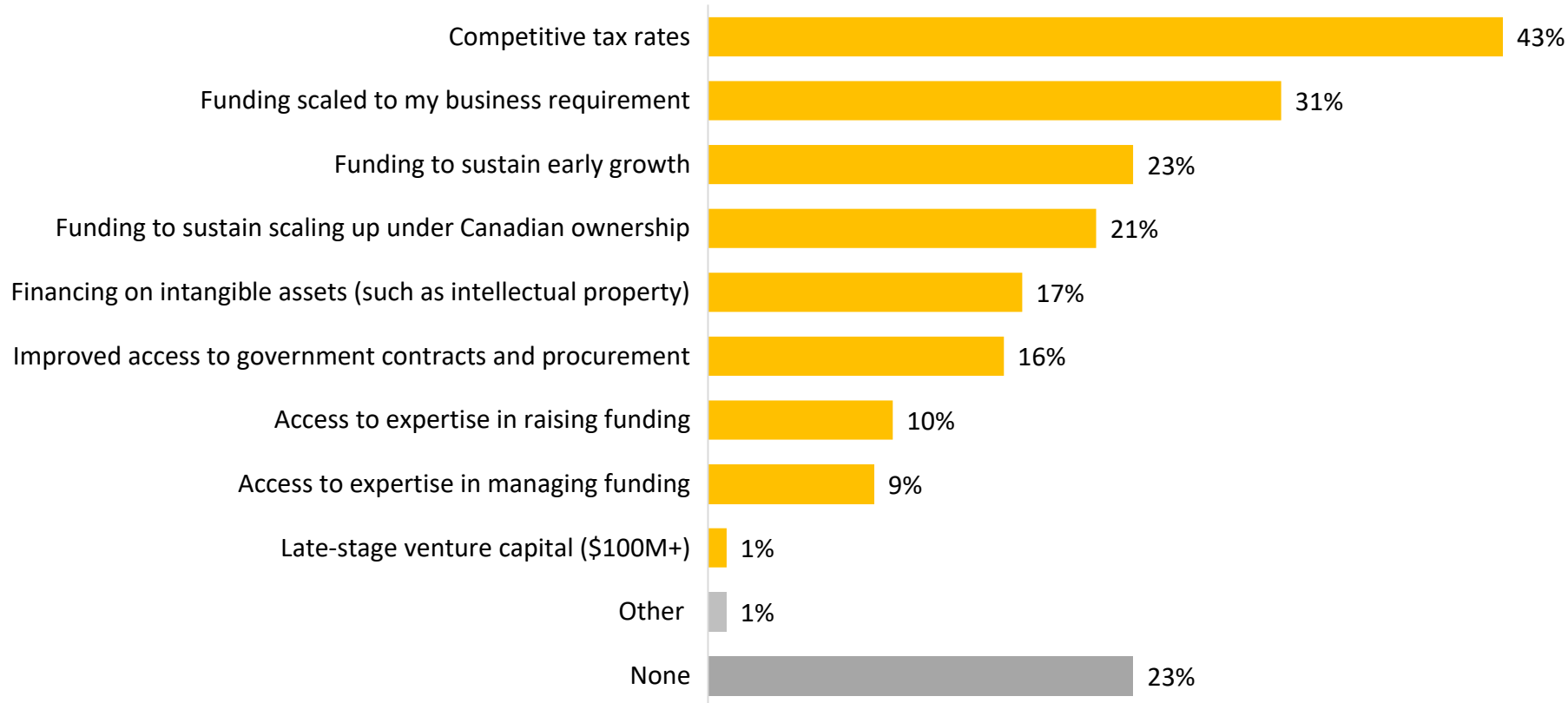
- In response to the challenge of increasing their profitability, respondents say they are innovating to improve efficiency, followed by unlocking new markets, adopting new digital technologies and increasing production capacity.



T7D\_a. For some businesses, a major challenge is increasing their profitability. Which of the following, if any, best describe how your business is tackling increased profitability? (Select up to 3)  
Base: Post-Campaign Survey Split sample, those asked (n=160)

# Solutions to Business Challenges – Competitive Tax Rates and Funding

- Over four in ten respondents say competitive tax rates would help them with the challenge of a lack of money impeding innovation – echoing and confirming what we heard in the focus groups where it was clear that finances and scaling-up consistently weighed on participants at the start-up and growth phases. What is interesting here is that 31% of businesses are looking for funding scaled to their business requirements, while 23% and 21% are looking for funding to sustain early growth and funding to sustain scaling up under Canadian ownership, respectively.

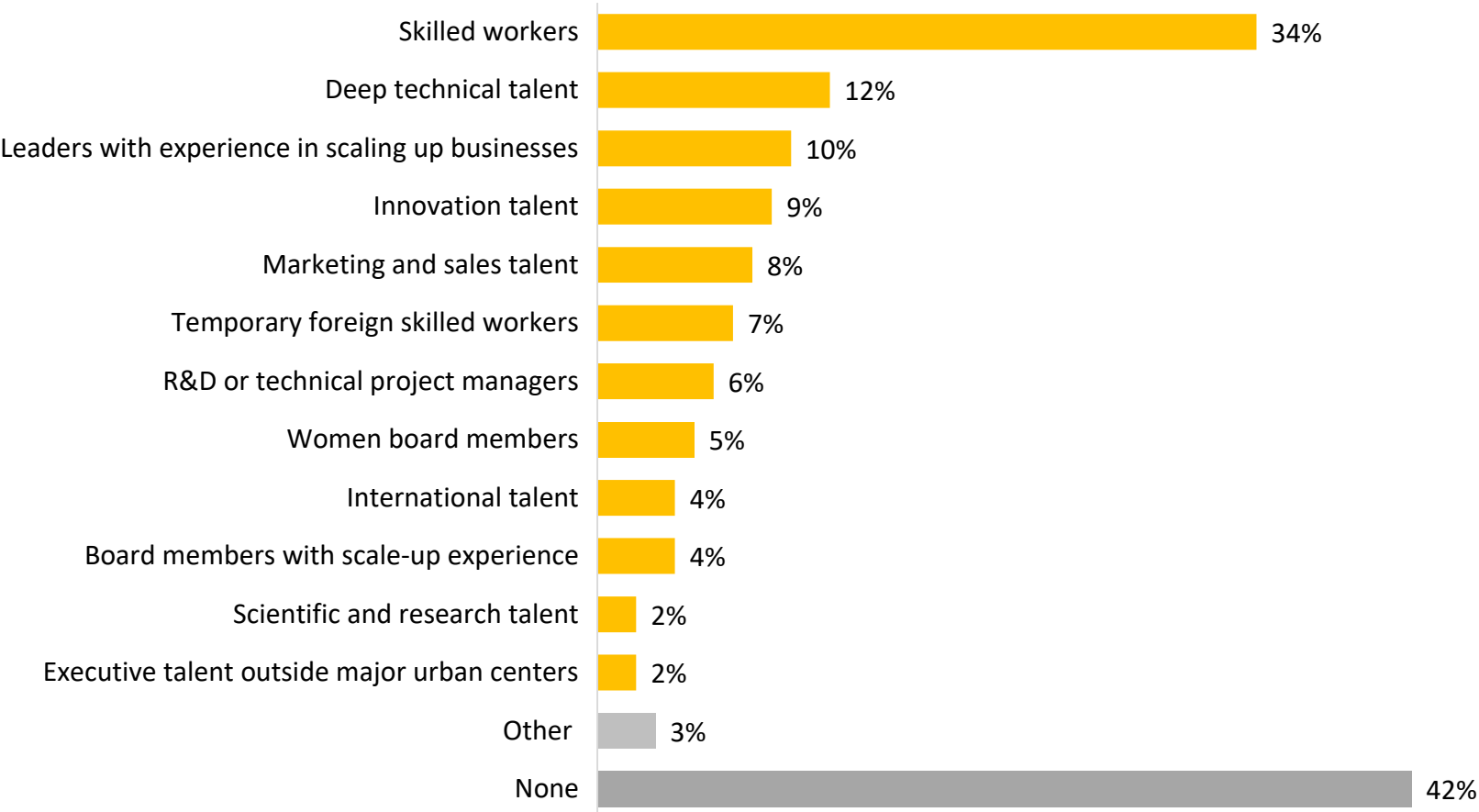


T7D\_b. For some businesses, a lack of money is a common barrier to innovation. What type of funding supports, if any, would be most helpful in meeting this challenge? (Select up to 3) Base: Post-Campaign Survey Split sample, those asked (n=160)



# Solutions to Business Challenges – Talent

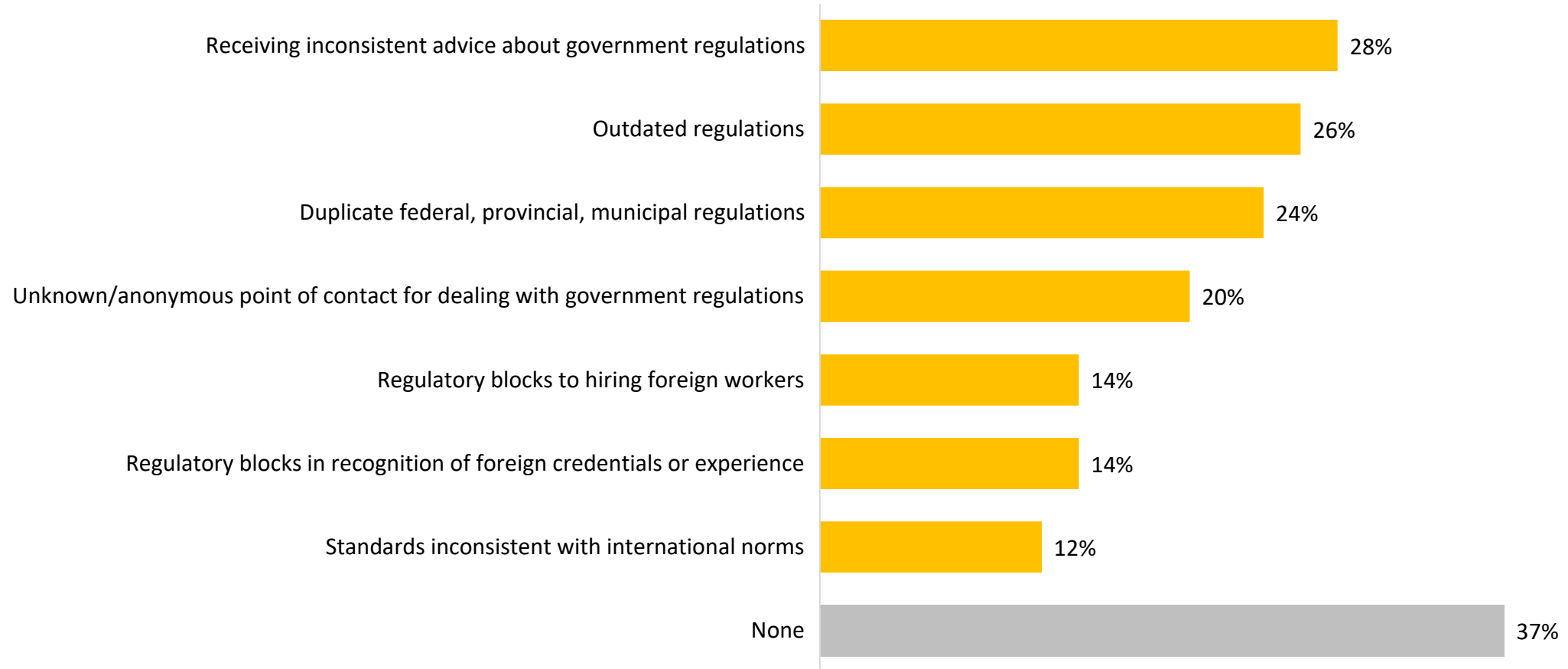
- A third of respondents say they have difficulty finding or retaining skilled workers, while four in ten say they don't experience any difficulty finding or retaining the right people. In the focus groups, staffing was identified as an increasingly pertinent issue in the start up phase.



T7D\_c. For some businesses, a major concern is finding and retaining people with the right talent and skills. Which of the following type of talent, if any, does your business have difficulty finding or retaining? (Select up to 3) Base: Post-Campaign Survey Split sample, those asked (n=158)

# Solutions to Business Challenges – Government Regulations

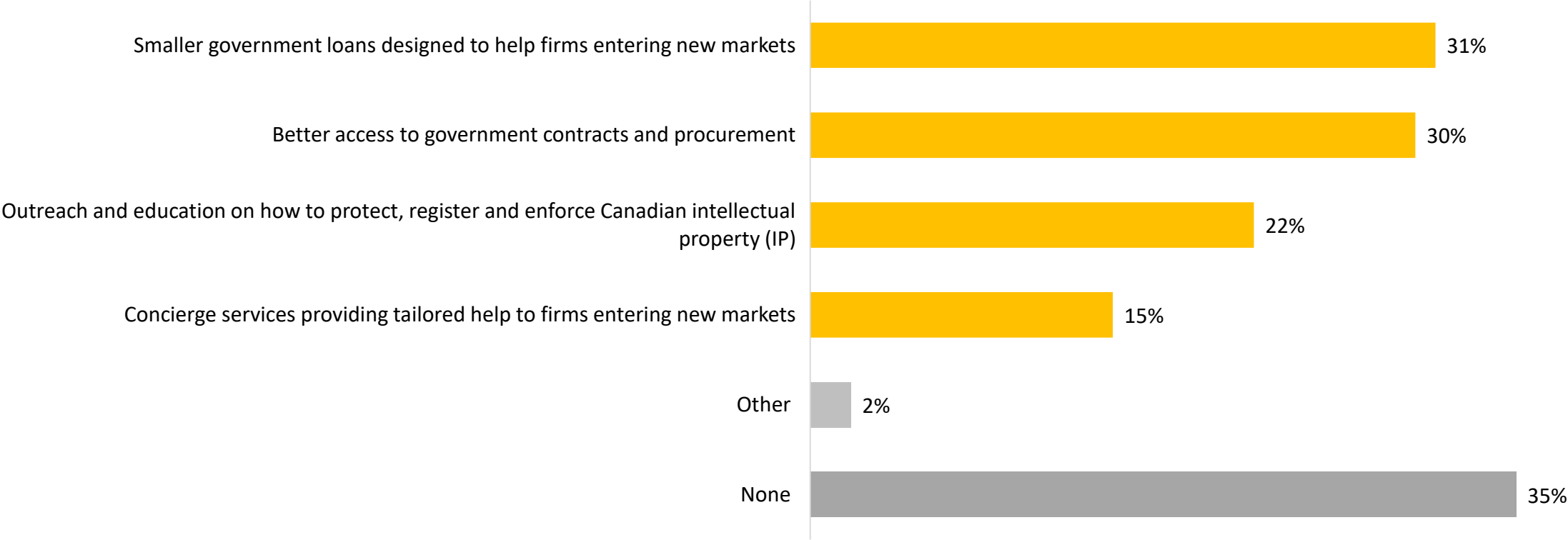
- A quarter or more respondents say inconsistent advice about government regulations, outdated regulations and duplicate regulations across different levels of government are barriers to their business growth.



T7D\_d. For some, the ability to bring products to market and grow their business can be improved through the modernization of government regulations. Which of the following, if any, are barriers to the growth of your business? (Select up to 3) Base: Post-Campaign Survey Split sample, those asked (n=157)

# Solutions to Business Challenges – Accessing New Markets

- In terms of help accessing new markets, respondents say small government loans designed to help firms enter new markets and better access to government contracts and procurement would be most helpful, followed by outreach and education on how to protect, register and enforce Canadian intellectual property.

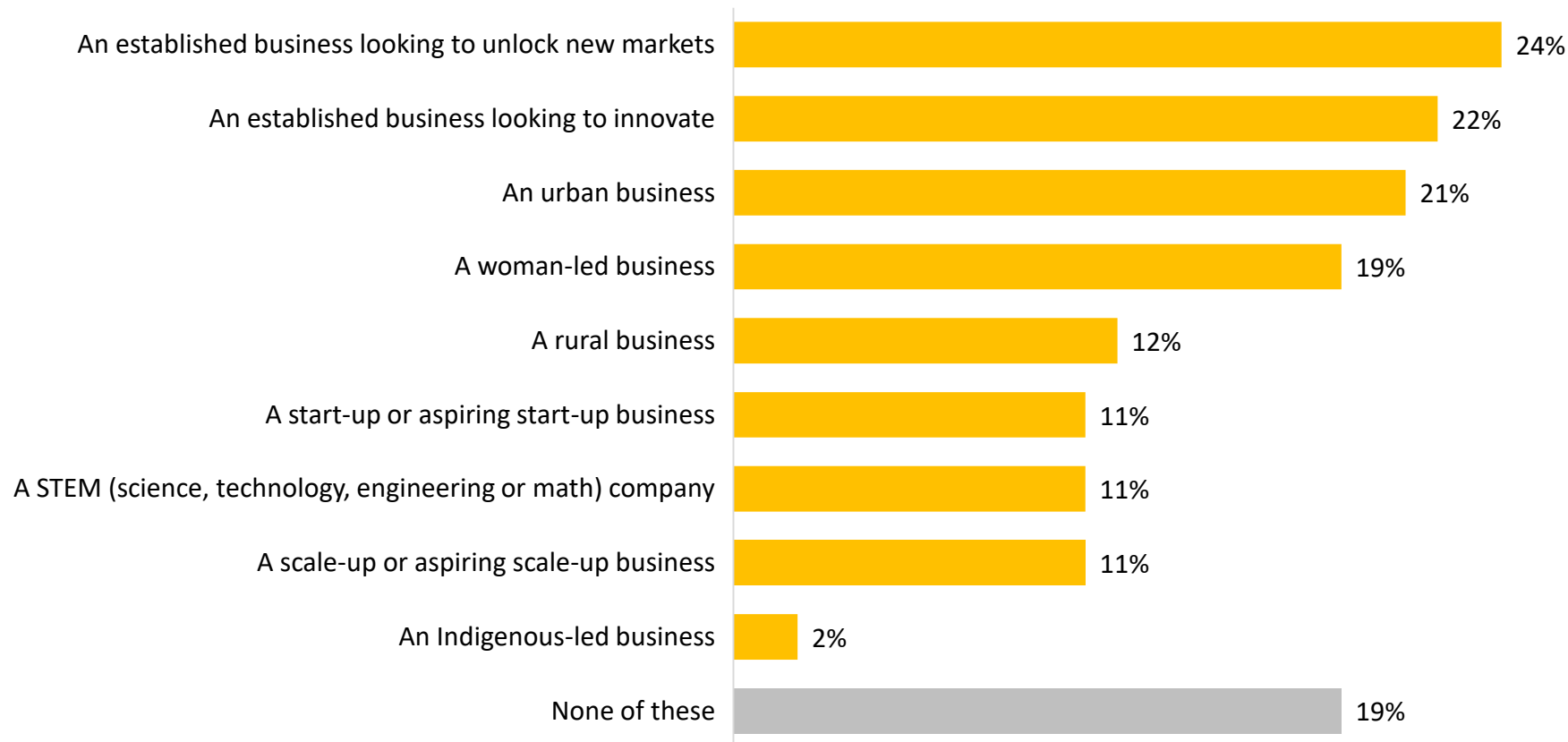


T7D\_e. Some businesses need to access new markets to grow. Which of the following, if any, would help your business better access new markets? (Select up to 2)  
Base: Post-Campaign Survey Split sample, those asked (n=158)

# 3. Profile of Respondents

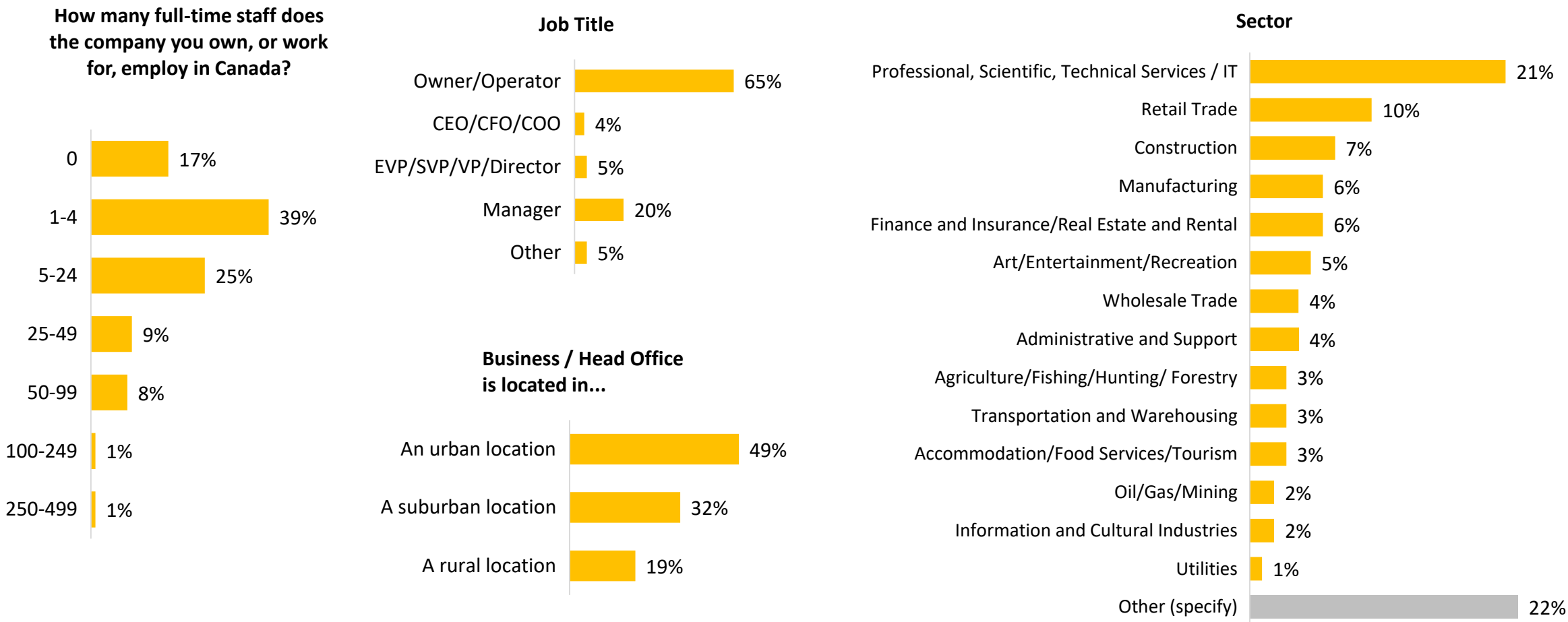
# Profile of SMEs

- A quarter of respondents identify their business as an established business looking to unlock new markets, and roughly two in ten identify their business as an established business looking to innovate, an urban business, or a woman-led business.



T10d. Would you describe your business or the one you work for as any of the following? (Select all that apply) Base: All respondents n=793

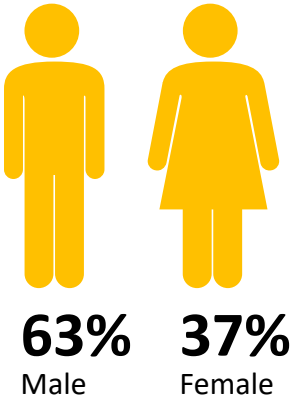
# Profile of SMEs – Size, Sector



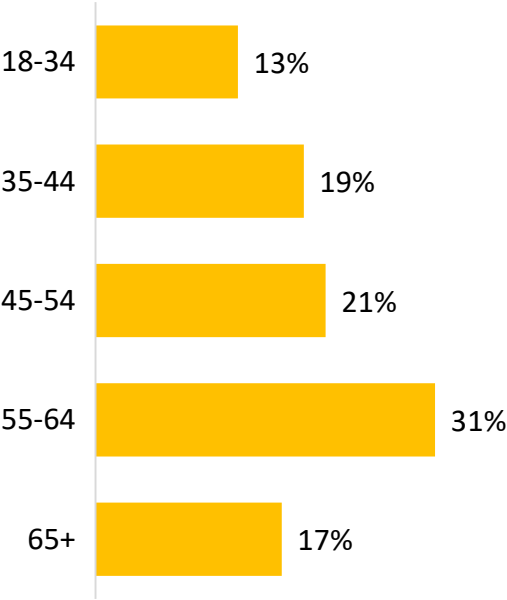
S3; S5; S8, S9 Base: All respondents

# Demographics

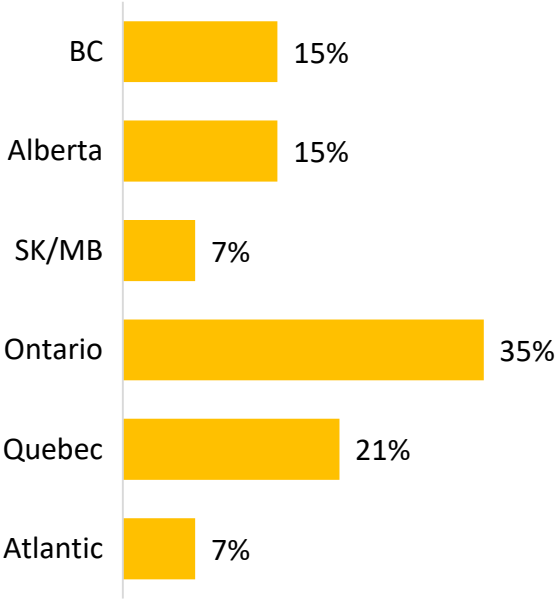
Gender



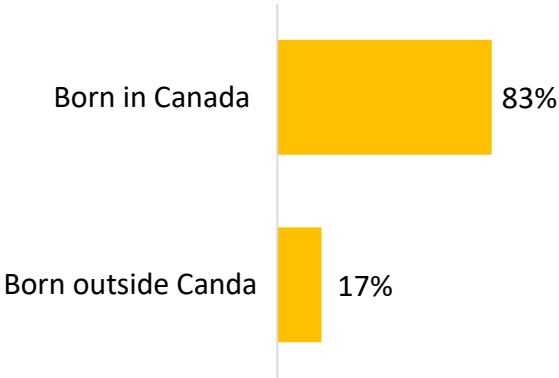
Age



Region



Where Born



Q. a, b, c. D5. Base: All respondents n=793

# Annexes

A - Qualitative Research: Full Report

B – Screener

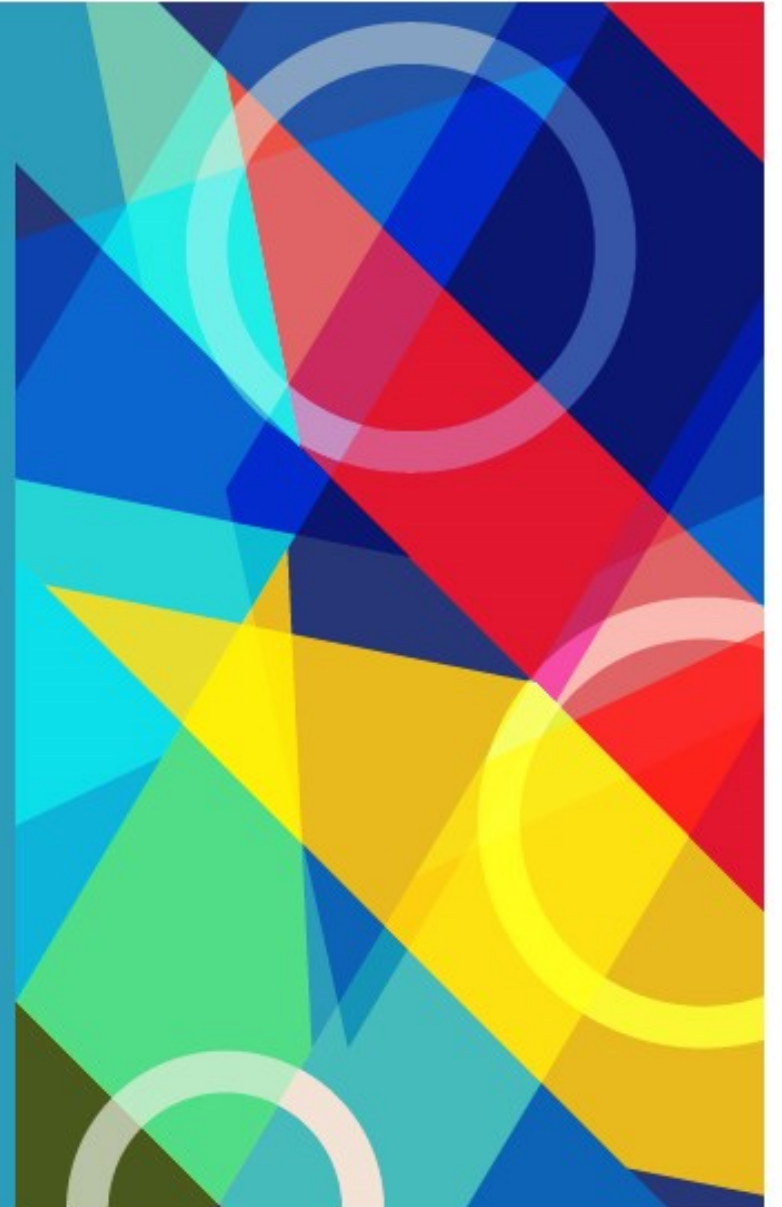
C - Moderator's Guide

D - Baseline Pre-Campaign Survey

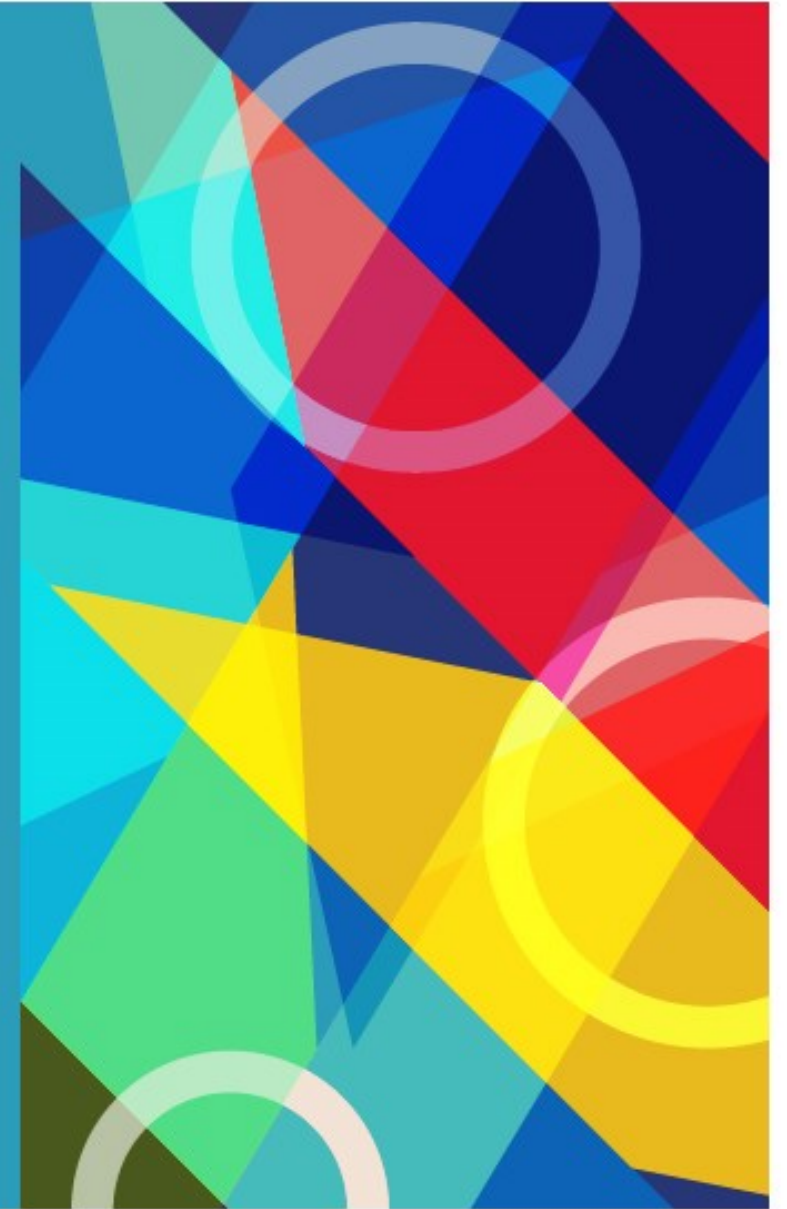
E – Benchmark Post-Campaign Survey



# A - Qualitative Creative Research: Full Report



# Study Objectives



# Background

Innovation, Science and Economic Development Canada (ISED) has developed a new platform – [innovation.canada.ca](http://innovation.canada.ca) – to provide business support to Small and medium enterprises (SMEs), especially those seeking to grow and reach new markets. ISED commissioned Ipsos to conduct research to support the development and evaluation of the Innovation for Success marketing and advertising campaigns to promote [innovation.canada.ca](http://innovation.canada.ca).

This report presents the highlights from an initial phase of qualitative research to test three creative concepts developed for the campaign. The value of qualitative research is that it allows for an in-depth exploration of the factors and interplay between factors that shape attitudes, perceptions and behaviours. Specifically, the objectives were to:

- evaluate the effectiveness of the three creative concepts in promoting the new platform
- explore expectations set for the platform by the concepts
- understand the current business environment and contextual attitudes that shape reactions to the concepts and the platform

# Methodology

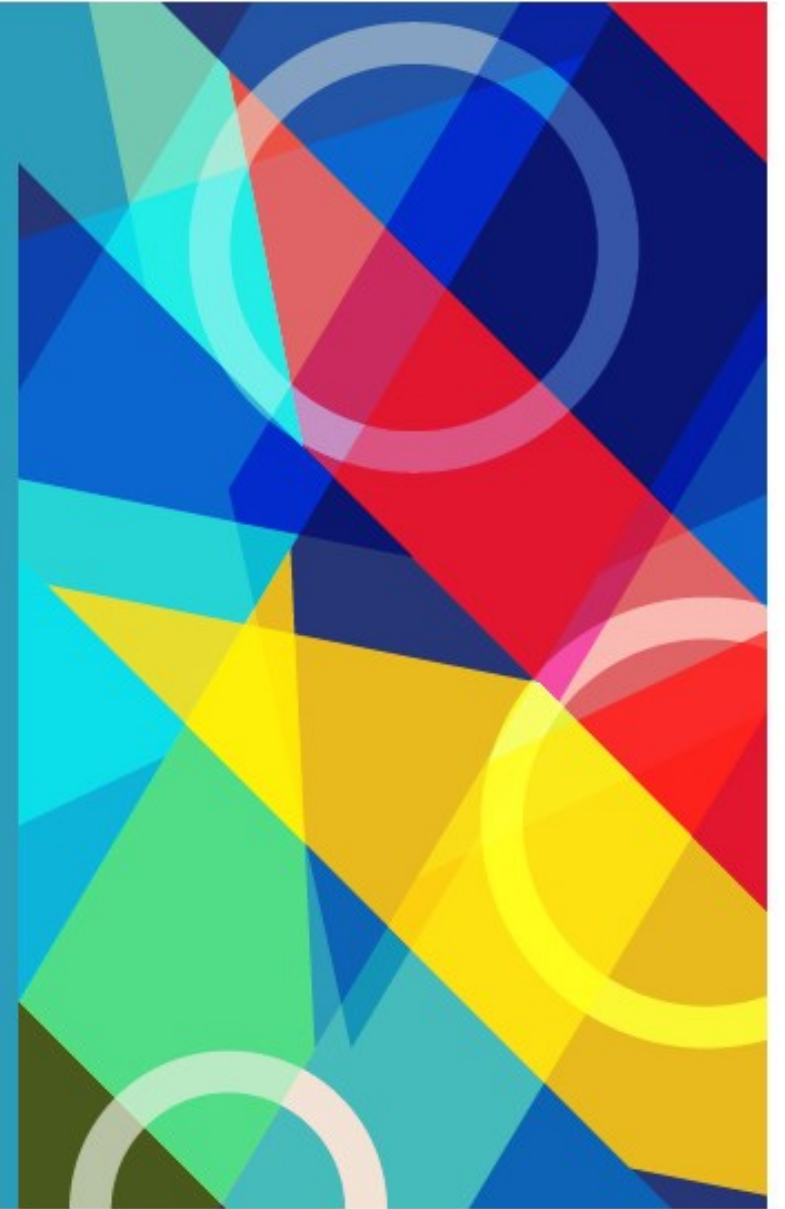
Eight focus groups were conducted in total among the various business audiences listed in the table below. Two of the focus groups took place in-person among business owners and entrepreneurs in the Greater Toronto Area and the remaining six focus groups were conducted online targeting business owners and intermediaries from across Canada, including francophones. Fieldwork took place between December 10<sup>th</sup> – 13<sup>th</sup>, 2018.

When interpreting the findings, it is important to note that the objective was to uncover views in-depth as opposed to producing statistically representative results. The insights from the research were used to refine the concepts and to inform the second phase of quantitative research.

The focus groups ranged from 90 to 120 minutes in length, and participants received a remuneration between \$250 and \$300 (full information is available in the Screener, Annex B).

| Audience   | In-person GTA focus group | Online focus group            |
|--|---------------------------|-------------------------------|
| Intermediaries accountants, lawyers and financial services branch managers that provide services to small business owners) |                           | 1 group                       |
| Medium business owners (100 to 499 employees)  |                           | 2 groups<br>1 group in French |
| Small business owners (0-99 employees)   | 1 group                   | 1 group in French             |
| Women entrepreneurs  | 1 group                   |                               |
| Young business owners (18-34 years old)  |                           | 1 group                       |

# Creative Testing Highlights



# Three Creative Concepts

For each concept, participants were shown an animatic and a mock-up of a digital banner.

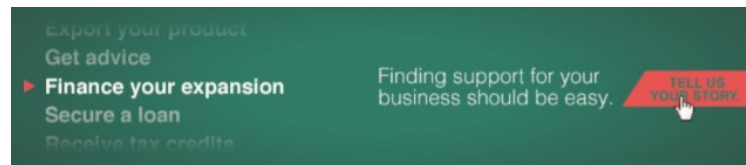
## Concept 1: “Moving Fast”

Script: What can you do for your business in 3 minutes? // START – GROW – EXPORT // A lot can be done in 3 minutes // Find out what the government can do for your business



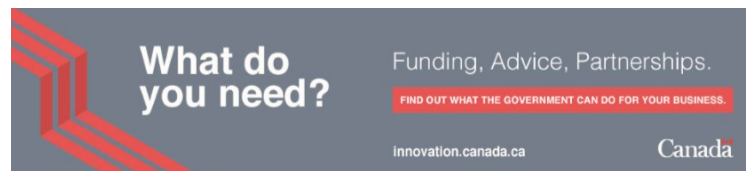
## Concept 2: “Simplicity”

Script: Doing what you do is hard // Finding government support shouldn't be // Tell us your story – Get access to hundreds of government programs for your business // Grow from here



## Concept 3: “What do you need?”

Script: FUNDING – ADVICE – PARTNERSHIPS // Find out what the government can do for your business



# “Moving Fast” Emerged as the Weakest Concept

## MAIN MESSAGE

The main message was not clear from the get go and only revealed at the end; this made the concept seem “abstract” and difficult to follow. Even after the ‘reveal’ at the end, some were still left unclear on how the whole concept ties together.

*“I don’t see the relation to the coffee. Maybe somebody can explain it to me.” – Medium Business Owner*

## CREATIVE APPROACH

Most commonly, the creative approach was described as *“chaotic”* and *“gimmicky”*. This was compounded by the lack of clarity on the main message. The hyper-focus on 3-minutes made the concept seem *“salesy”* and *“annoying”*.

That said, the approach used in this concept appealed more to youth business owners. They found it *“catchy”* and a *“step up”* from the rest.

## CALL TO ACTION

While it was acknowledged the 3-min message is an interesting spin on government processes being bureaucratic and time-consuming, it was not enough of a hook to follow through with the call to action to visit the platform.

The time it takes to access information was *“secondary”* to what information can be accessed. Indeed, there was a willingness to spend more time *“if someone can help [them] change [their] business in a life-changing way”*.

## EXPECTATIONS OF THE PLATFORM

The concept can potentially set false expectations in that the entire platform experience will take 3 minutes, not just the questionnaire part.



# “Simplicity” Performed Well, but Might Not Break Through

## MAIN MESSAGE

*“Helping”* was taken to be the main message and there was appreciation of the concept acknowledging how hard it is to run a business *“they feel our pain”*. Participants left with the impression that help is available to the widest range of business types. It came across as providing more *“dense”* and *“general”* information on what support is available.

## CREATIVE APPROACH

The creative approach was *“safer”* and more in line with what they expected from a government ad. Most took comfort in the familiar approach, although there was a view that the approach lacked *“edge”* and felt somewhat *“bland”*. This in turn leaves a question mark around the potential cut through of this concept.

*“Maybe not as creative [...] but it was more comfortable, more expected from a government agency.” – Intermediaries*

## CALL TO ACTION

The broad appeal of the message succeeded in *“piquing”* participants’ interest to follow through with the call to action to visit the platform. The research found some potential for hold back: mention of ‘export’ was seen as *“too grand”* and therefore irrelevant for smaller businesses. ‘Expand’ was suggested as a more appropriate term.

## EXPECTATIONS OF THE PLATFORM

The more explicit focus on the platform, via a close-up and the step-by-step narrative, led to the expectation of the platform to be a *“one-stop-shop”*, *“tailored”*, *“easy to use”* and *“quick”*.



# “What You Need” Performed Well

## MAIN MESSAGE

The main message was seen to center around support for businesses to move forward; the trifecta of FUNDING – ADVICE – PARTNERSHIPS fitted perfectly with what many were looking for. As did the narrative around ‘new markets’, ‘growth’ and ‘tailored advice’. The choice of showing a tomato farmer along with office-based businesses was taken to say that *“all businesses are welcome”* on the platform and thus well received.

## CREATIVE APPROACH

There was positive reception to the *“upbeat”* and *“celebratory”* tone of the creative approach. This in turn created a sense of excitement. The depiction of technology in most scenes, combined with the word ‘innovation’, led to an impression held by some that the concept was exclusively targeting the technology sector.

*“I found the creative suggests the government is only interested in supporting the next Facebook [...] It’s looking for an innovative sexy product. Not just a boring small business.” – Youth business owner*

## CALL TO ACTION

There was strong interest to follow through with the call to action to visit the platform. The only hesitations found revolved around the point on innovation & technology expressed by some, and a preconceived notion that funding programs for expansion into new markets, which are stressed in the concept, were not relevant to others.

## EXPECTATIONS OF THE PLATFORM

The concept set realistic expectations of the platform in that it would provide quick, tailored access to important information for business owners.

# Digital Banners Findings

Across all 3 concepts, more prominent placement of the Canada wordmark is required – wordmark provides credibility; trust. In the English groups in particular, the absence of the Canada wordmark would deter participants from clicking through.

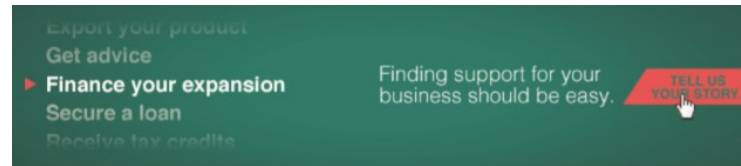
*“To have [the Government of Canada] logo that there would make it more legitimate looking, instead of Joe Blow’s Business Tip.” – Medium Business Owner*

## “Moving Fast” banner feedback



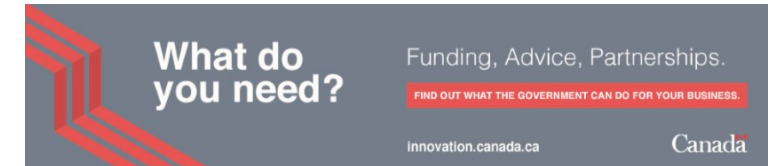
- Liked the clickable buttons and assumed that they would direct straight to the relevant section of the website
- Export again seen as too specific and irrelevant for some
- Views on the countdown clock on the standard banner were divided: *“gives me anxiety”* vs. *“not supposed to be a time waster”*
- Unrealistic that their questions will be answered/problems resolved in 3 minutes

## “Simplicity” banner feedback



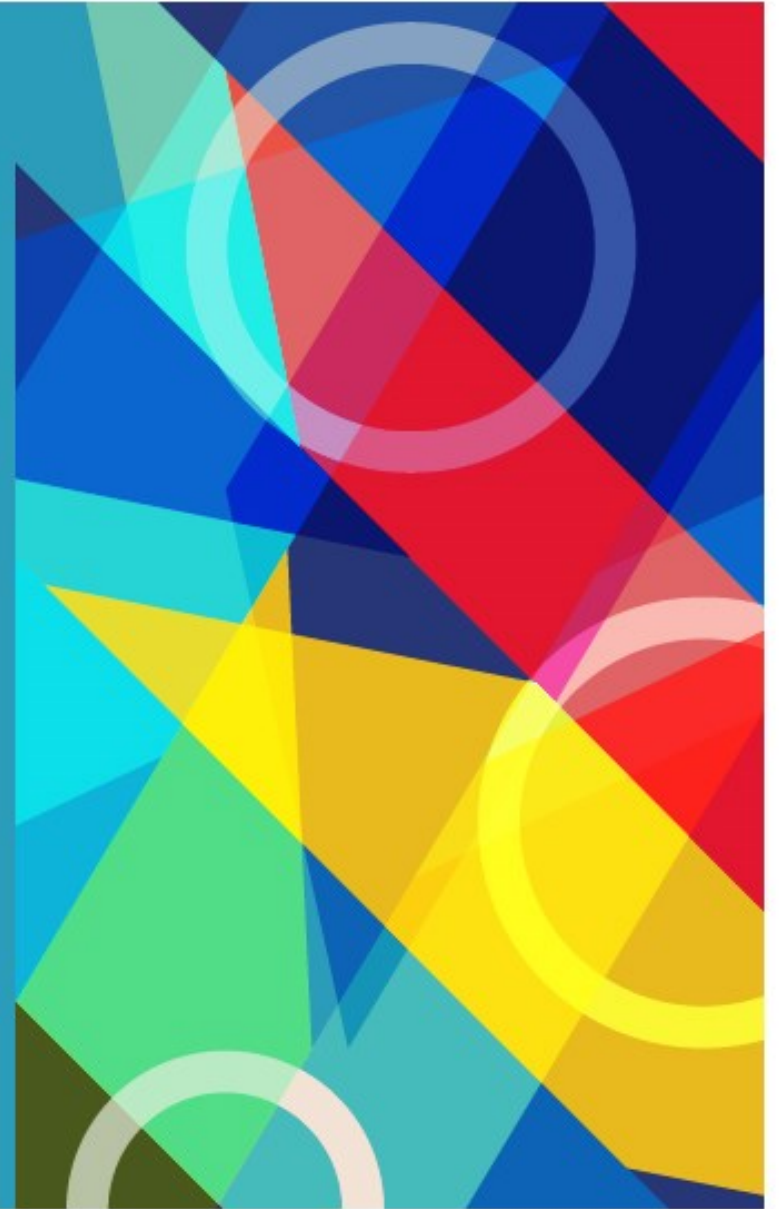
- Colour scheme was seen as *“boring”* and associated with a financial institution. This was compounded by the emphasis on finance throughout the banner copy.
- The standard banner images feel a bit *“disjointed”* and unclear
- Scrolling mechanism was unclear and could potentially be cumbersome vs. clickable buttons

## “What You Need” banner feedback



- Only concept where the Canada wordmark was displayed upfront thus well-received
- ‘What do you need’ is too open and vague (*“It could be used cars for all I know”*) and therefore uninviting to click through
- Choice of image on the standard banner was seen as weak and not attention-grabbing enough
- In French, opening with a question made it feel personal and also sets it up as a problem/solution construct

# Business Environment and Contextual Attitudes



# Becoming an Entrepreneur

## CIRCUMSTANTIAL FACTORS

“ *I accidentally became an entrepreneur, but I can't imagine being anything else now.* ”

*U.S. recession kind of forced my hand. That tech sector wasn't getting any better for a number of years, so I decided to kind of make my own way.*

*And the reason for starting my business was **out of necessity**, to earn a living.*

## PERSONAL DRIVE

“ *From a young age, I was in the habit of noticing problems and finding solutions. In Grade 9, I noticed high schools were taking pops out of school so I started selling sodas from my locker.* ”

*I worked for a national company for 15 years [...], just enough years to realize I really wanted to do my own thing [...] I really enjoy it; I would never go back to working for somebody else.*

*I started at one of the big accounting firms, and just didn't like the way they did things.*

## On Key Challenges

- Finances and scaling up consistently weighed on participants from the start-up phase and well into the future.
- Establishing brand and building a customer base were the main challenges during the start up phase.
- Staffing has become a more pertinent issue nowadays.
- Businesses look for and appreciate advice and mentoring to guide decision-making in scaling-up.

“ *In the first years, market validation [...]. Having a young team, young founders and jumping into construction software [...], it was hard [...] to have people trust your company and your service. – Young Business Owner*

*I'm in a situation where I would have to invest significantly to grow the company [...] But I don't really know where I can get the guidance I feel I'd like to have before making any of these big investments. And so, as a result, we've kind of just stayed where we're at in this smaller state. – Small Business Owner*

*I live in Vancouver [...] and attracting top talent is an ongoing challenge, especially when increase in living costs, etc. [...] We call it a staffing war [...] We're trying to find creative ways to grow our business without increasing our labour. – Intermediary*

# Summary of Key Challenges





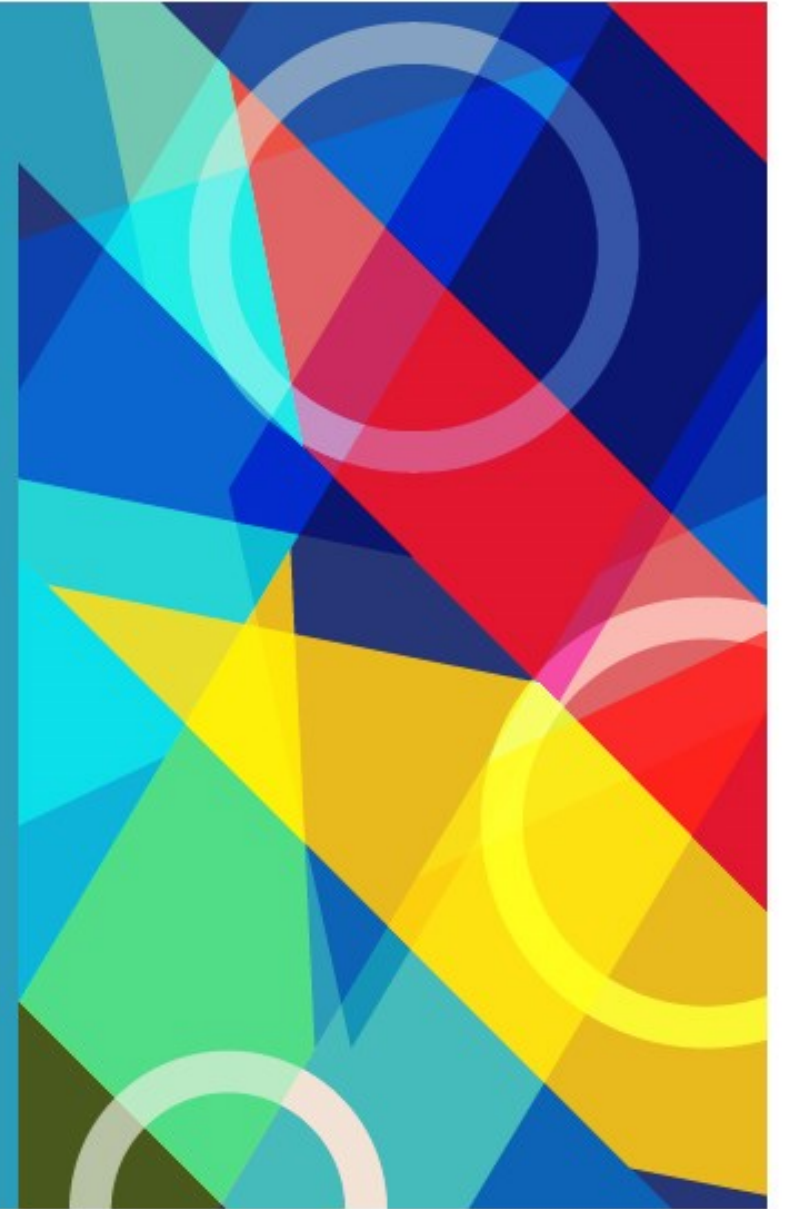
# The Word “Innovation” Led to Some Strong Connotations with Silicon Valley Type Start-Ups

- This tech connotation appeared to be strongest of those who had interactions with or had some awareness of existing government programs.
- As alluded to already, a strong emphasis on innovation leads to a feeling that the concept is not relevant to them and their business, especially service-based businesses.
- “Cutting edge” and “new ways of doing things” were other definitions mentioned.



**“ We have an Innovation Centre and it is a great resource for business. But it primarily caters and advertises to the tech industry. So I feel the word “innovation” is really catering toward tech industry and not much else.  
– Young Business Owner**

# Moving Forward on Initial Design





## In Sum, the Testing Found...

- The message and the delivery of the message in **“Moving Fast”** was problematic.
- **“What You Need”** has a more engaging and upbeat tone which comes across as more aspirational, yet there was no consensus on whether the concept succeeded in striking the balance between innovation and not alienating non-tech based businesses.
- **“Simplicity”** has a very broad-based message with a creative approach that is safe, and in line with what they expect from government, yet raises questions on potential cut through.

# The Testing Revealed a Set of ‘Guiding Principles’ for Moving Forward

## MAIN MESSAGE

- ✓ Broad based messages, references both start up, growth, access new markets (vs export)
- ✓ A program of the Government of Canada – validates offering; increases trust, credibility
- ✓ Prominent placement of innovation.gc.ca to strengthen call to action

## CALL TO ACTION

- ✓ Prominent placement of Government of Canada – validates, increases trust, credibility
- ✓ Prominent placement of URL/program name “innovation.gc.ca”
- ✓ Include innovation.gc.ca and Canada wordmark on all banners to strengthen call to action and improve response

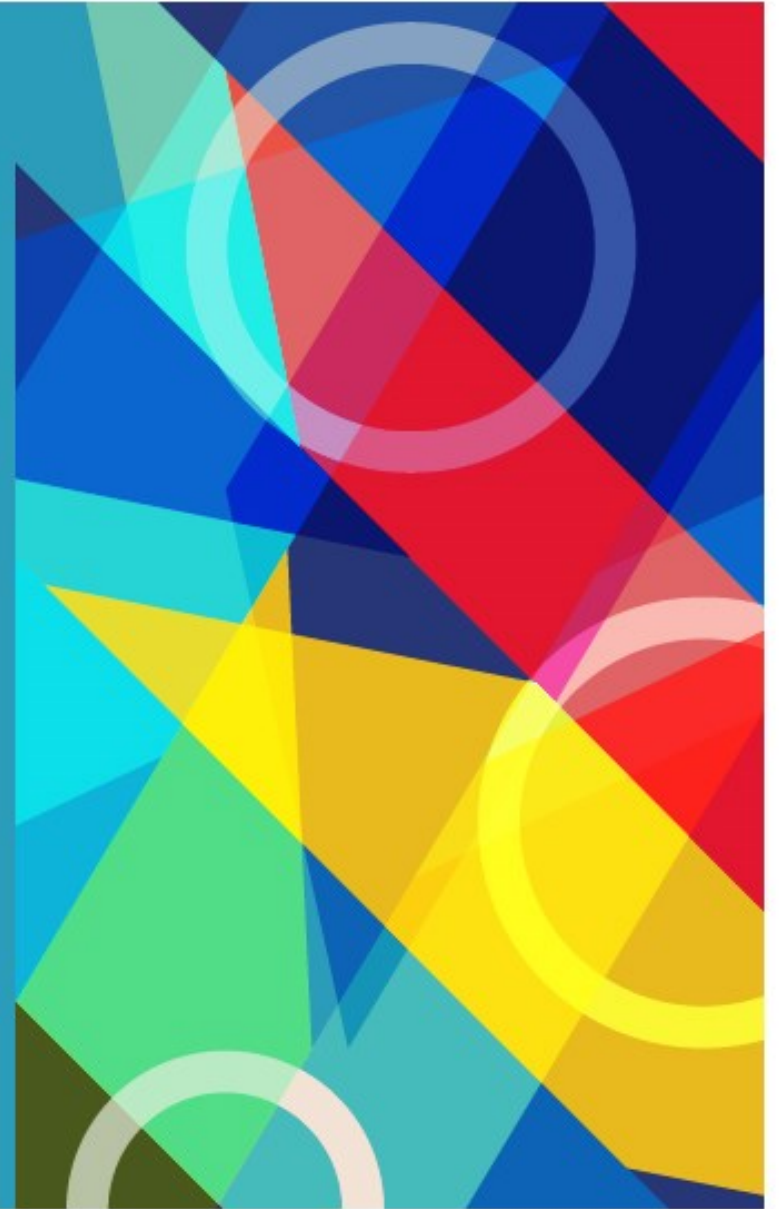
## CREATIVE APPROACH

- ✓ Support broad message with inclusive visuals
- ✓ Strong association between innovation and technology by retaining visuals that are inclusive of other sectors (i.e., keep greenhouse, construction vignettes); these visuals help non-tech based businesses understand innovation also applies to their sectors
- ✓ Strive to show a service (e.g., construction vs only product)
- ✓ Keep: diversity of people – young, old, ethnic, both genders depicted
- ✓ Keep: diversity of business size: ensure small and growing – medium/large businesses are depicted

## STONE

- ✓ Engaging and upbeat, aspirational
- ✓ Overall ability to cut through

# B- Focus Group Screenener



# SCREENER

CMR #: B143  
Business Owners  
Database

Respondent: \_\_\_\_\_

Home #: \_\_\_\_\_ Mobile: \_\_\_\_\_

Email: \_\_\_\_\_

Group date/time: \_\_\_\_\_

Recruit 10 per group for 5 TO 7 to show

## IN FACILITY GROUPS – GTA:

GROUP 1:  
Tuesday,  
Dec. 11<sup>th</sup>  
5:30 pm  
SBO – 0 – 99 Emp

GROUP 2  
Tuesday,  
Dec. 11<sup>th</sup>  
7:30 pm  
Female Business Owners

## ONLINE GROUPS:

GROUP 3:  
Monday,  
Dec. 10<sup>th</sup>,  
5:30 pm  
Intermediaries

GROUP 4:  
Monday,  
Dec. 10<sup>th</sup>  
7:30 pm  
MBO – 100 – 499 Emp

GROUP 5:  
Wednesday,  
Dec. 12<sup>th</sup>  
5:30 pm  
MBO – 100 – 499 Emp

GROUP 6:  
Wednesday  
Dec. 12<sup>th</sup>  
7:30 pm  
Youth Owners

GROUP 7:  
Thursday,  
Dec. 13<sup>th</sup>  
5:30 pm  
MBO – 100 – 499 Emp  
French

GROUP 8:  
Thursday,  
Dec. 13<sup>th</sup>  
7:30 pm  
SBO – 0 – 99 Emp  
French

## INTRODUCTION:

Good morning/afternoon/evening, my name is \_\_\_\_\_ from Canada Market Research. We have been asked by the **Government of Canada** to invite a select group of **business owners** to participate in a discussion regarding their experiences as the owner of a business in Canada. Other decision makers from small and medium-sized companies located in Canada will be taking part in this research, all of them involved in shaping the direction of their company. It is a first-name basis only discussion so nobody, including the Government of Canada, will know the companies being represented. For their time, participants will receive a cash compensation.

Participation is voluntary and all opinions will remain anonymous and will be used for research purposes only in accordance with laws designed to protect your privacy. We are simply interested in hearing your opinions, not attempt will be made to sell you anything. The format may be a round table discussion or an online panel interview lead by a research professional.

**ONLINE GROUPS :** The group will be conduct online AND via teleconference and led by a research professional. All opinions expressed will remain anonymous and views will be grouped together to ensure no individual can be identified.

We need to speak with a variety of companies. May I please ask you a few questions to see if your business would qualify to participate in the session?

Yes.....1 - CONTINUE

No.....2 - THANK & TERMINATE

# SCREENER

Is your company's primary line of business advertising, media, marketing or marketing research?

Yes .....1 - **Terminate**

No .....2

## BUSINESS PARTICIPANT PROFILE

1. Approximately how many full-time staff (FTEs) does your company currently employ in Canada?

specify: \_\_\_\_\_ - RECORD ACTUAL NUMBER

### QUOTAS:

#### GROUPS 1 & 8:

- ALL WILL BE SMALL BUSINESS OWNERS – DEFINED AS HAVING 0 – 99 FT EMPLOYEES (1 – 5 IS MICRO BUSINESS / 6 – 99 IS SMALL BUSINESS)

#### GROUP 2:

- ALL WILL BE FEMALE BUSINESS OWNERS
- RECRUIT A GOOD MIX OF NUMBER OF FT EMPLOYEES

#### GROUP 3:

- ALL WILL BE S/E PROFESSIONAL OWNERS
- RECRUIT A GOOD MIX OF NUMBER OF FT EMPLOYEES

#### GROUPS 4, 5 & 7:

- ALL WILL BE MEDIUM BUSINESS OWNERS – DEFINED AS HAVING 100 – 499 EMPLOYEES
- TERMINATE ANYONE WITH 500 OR MORE FT EMPLOYEES

#### GROUP 6:

- ALL WILL BE YOUTH BUSINESS OWNERS
- RECRUIT A GOOD MIX OF NUMBER OF FT EMPLOYEES

- 2a. Do you consider yourself to be a self-employed professional or entrepreneur?

Yes..... 1 – ASK Q.2B

No..... 2

### ASK ALL THAT ANSWERED “YES” AT Q.2A – ALL OTHERS SKIP TO Q.3

- 2b. What profession do you practice? DON'T READ LIST

- Healthcare professional (dentist, physiotherapist, psychiatrist, counsellor/psychologist social worker, physician, etc.)
- Lawyer
- Accountant/auditor/actuary
- Engineer
- Training and development professional (e.g., coaching, organizational development, HR, etc.)
- Investment planner/financial advisor
- Consultant (e.g, IT consultant, management consultant, etc.)
- Architect
- Scientist
- Artist
- Other : \_\_\_\_\_ - CHECK WITH CLIENT

- W/Q

### QUOTAS :

GROUP 3 – ALL WILL BE PROFESSIONAL OWNERS – MUST SELECT ONE OF THOSE LISTED AT Q.2B TO CONTINUE

# SCREENER

## CONTINUE WITH ALL:

3. Record gender of respondent (DON'T ASK):

|        |   |            |
|--------|---|------------|
| Male   | 1 | } - QUOTAS |
| Female | 2 |            |

## QUOTAS:

GROUP 2: ALL WILL BE FEMALE

GRPS 1, 3 – 8: AIM FOR A MIX OF GENDERS IN EACH GROUP

4. To confirm, are you the owner of the business or overseeing the operations of your business?

Yes.....1

No.....2 – ASK TO BE REFERRED TO THE OWNER

5. It is important that we include a wide range of business owners in our study. In order to do so, may I please enquire about your ethnic heritage?

|                          |    |
|--------------------------|----|
| Indigenous Canadian..... | 1  |
| African Canadian.....    | 2  |
| Chinese.....             | 3  |
| Caucasian.....           | 4  |
| East Asian.....          | 5  |
| East Indian.....         | 6  |
| Filipino.....            | 7  |
| Hispanic.....            | 8  |
| Korean.....              | 9  |
| Pakistani.....           | 10 |
| Other:.....              | 11 |

} - WATCH QUOTAS

## QUOTAS:

GROUPS 1 & 8: SMALL BUSINESS OWNERS

- IN EACH GROUP AIM FOR AS MUCH REPRESENTATION AS POSSIBLE WITH OWNERS THAT ARE INDIGENOUS CANADIAN AND/OR FILIPINO, INDIAN, CHINESE, KOREAN AND/OR PAKISTANI

## GROUPS 2 – 7:

- RECRUIT AS IT FALLS – AIM FOR A MIX

6. May I please confirm your age? {We are looking for a mix of decision makers from all ages. May I have your age please? } (read categories as needed)

Specify: \_\_\_\_\_ - WATCH QUOTA

## QUOTAS:

GROUPS 1 – 5 AND 7 – 8:

- RECRUIT A GOOD MIX OF AGES IN EACH GROUP
- 18 – 75+ YRS OF AGE

## GROUP 6:

- ALL WILL QUALIFY AS YOUTH OWNERS – 18 – 34 YRS OF AGE

## SCREENER

7. In which industry or sector does your company operate? If you are active in more than one sector, please identify the main sector. **DO NOT READ LIST. ACCEPT ONLY ONE RESPONSE. CONFIRM RESULT WITH RESPONDENT AS NECESSARY. RECRUIT A GOOD MIX!**

- o Agriculture/Fishing/Hunting / Forestry
- o Oil/Gas/Mining
- o Utilities
- o Construction
- o Manufacturing
- o Wholesale Trade
- o Retail Trade
- o Transportation and Warehousing
- o Information and Cultural Industries
- o Finance and Insurance/Real Estate and Rental
- o Professional, Scientific and Technical Services / IT / Computers
- o Administrative and Support
- o Waste Management
- o Remediation Services
- o Art/Entertainment/Recreation
- o Accommodation/Food Services/Tourism
- o Other (specify)

### QUOTAS:

- **TERMINATE ANYONE THAT SELECTS CHARITABLE ORGANIZATION AND/OR NOT-FOR-PROFIT**

### GROUPS 3 – INTERMEDIARIES:

- **IN EACH GROUP RECRUIT A GOOD MIX OF ACCOUNTANTS, LAWYERS AND BRANCH OWNERS OF FINANCIAL SERVICES COMPANIES THAT ASSIST SMALL BUSINESS OWNERS**

### GROUP 6 – YOUTH OWNED BUSINESSES:

- **OWNERS CAN QUALIFY BASED ON THEIR AGE – 18 – 34 YRS**
- **AIM FOR A GOOD MIX OF INDUSTRY**

### ALL OTHER GROUPS:

- **ENSURE A GOOD RANGE OF COMPANY TYPES IN EACH GROUP**

- 9a. How long has your firm been in business?

Specify: \_\_\_\_\_

### QUOTA:

- **AIM FOR A GOOD MIX OF TENURE OVERALL**

## SCREENER

9b. What city/town and province is your business located in?

Specify: \_\_\_\_\_

### QUOTAS:

#### GROUPS 1 & 2:

- ALL WILL BE LOCATED IN THE GTA

#### GROUPS 3, 4, 5 & 6:

- RECRUIT FROM A GOOD MIX OF AREAS ACROSS CANADA, INCLUDING ATL, ON (NOT GTA), BC AND AB

#### GROUPS 7 & 8:

- RECRUIT FROM QUEBEC + A GOOD MIX ACROSS CANADA, INCLUDING EASTERN/NORTHERN ONTARIO, ATL, MB AND BC

10. How many permanent full-time employees, besides yourself, are employed by your firm?

Specify: \_\_\_\_\_ - WATCH QUOTAS

### QUOTAS:

#### GROUPS 1 & 8:

- ENSURE A GOOD MIX IN EACH GROUP OF 0 – 99 EMPLOYEES

#### GROUPS 2, 3 & 6:

- AS IT FALLS – AIM FOR A GOOD RANGE OF EMPLOYEES, INCLUDING SOLE PROPRIETORS

#### GROUPS 4 & 7:

- ENSURE A GOOD MIX IN EACH GROUP OF 100 – 499 EMPLOYEES

### PAST PARTICIPATION SCREEN:

11a. Have you ever taken part in a market research discussion (focus group or interview), whether in person, online or over the phone?

Yes.....1 – ASK Q.7B

No.....2 – SKIP TO Q.7E

11b. When did you last participate in a market research study? Would that be ...

With the past 6 months.....1 – **Terminate**

Within the past 6 – 12 months.....2

Longer than 12 months ago.....3

11c. Thinking of the past 5 years, how many market research studies have you participated in?

Specify: \_\_\_\_\_ - **TERMINATE IF MORE THAN 5**

11d. What were the topics of the previous market research studies you have participated in?

\_\_\_\_\_

**NOTE: RECORD**

### ASK ALL:

11e. Have you been invited to participate in another market research study in the near future?

Yes.....1 – **TERMINATE**

No.....2



# SCREENER

## ASK GROUPS 3 – 8 ONLY – ALL OTHERS SKIP TO Q.9A:

The next few questions are about technology.

These sessions are going to be conducted online. This means you can participate from the comfort of your home or office.

- 12a. Do you have access to a computer with high speed Internet at home or work, which you would be able to use to participate in the online focus group?

Yes.....1

No.....2 – **THANK & TERMINATE**

- 12b. Does this computer have sound?

Yes.....1

No.....2

- 12c. As this particular research group is being conducted as an online live group, typing your responses will be the only form of communication. Speed and comfort with typing is very important.

How comfortable will you feel participating in a group that will require you to type ALL of your responses on the keyboard? Would you be...

Very comfortable.....1

Comfortable.....2

Somewhat comfortable.....3-**TERMINATE**

Somewhat uncomfortable.....4-**TERMINATE**

Very uncomfortable.....5- **TERMINATE**

## ASK ALL:

The next question is creative in nature – please have fun when answering!

- 13a. If you were paid to develop an app that could improve the quality of your life, what type of app would you develop and why?

---

---

## INTERVIEWERS NOTE:

Respondents that are invited to participate must be creative and articulate and able to express themselves with ease.

Please ensure:

- No difficulty with language
- No recruits that use one word answers or reply with “I don’t know”
- Respondents are enthusiastic and engaged!

**If there is any doubt, PLEASE DON’T RECRUIT!**

- 13b. Participants may be asked to read or listen to materials during the group. Is there any reason why you could not participate fully?

Yes.....1 – **Terminate**

No.....2

## NOTE:

**TERMINATE IF RESPONDENT OFFERS ANY SIGHT/HEARING PROBLEMS, A WRITTEN OR VERBAL LANGUAGE PROBLEM OR A CONCERN WITH NOT BEING ABLE TO COMMUNICATE EFFECTIVELY**

## SCREENER

- 13c. The session will be conducted as a small group discussion with approximately 6 to 8 other people like yourself. We will ask that you be an active participant in the discussion and freely express your opinions and point of view. Will you feel comfortable participating in this type of session?

Yes..... 1  
No..... 2 – TERMINATE  
Hesitant/Unsure..... 3 – TERMINATE

**ONLINE GROUPS:** To take part in the session, we need you to log into a secure website and dial-in via a telephone line. You therefore need access to a desktop or laptop computer, an internet connection, phone, and telephone line. Please note that you cannot log into this session using a smartphone or tablet, it must be accessed via a laptop or desktop.

### INVITATION:

Thank you for answering my questions!

I'd like to invite you to participate in a small group discussion with other business owners that will be conducted by a professional moderator.

The group would take place on:

### IN FACILITY GROUPS – GTA:

|   |  |
|---|--|
| <b>GROUP 1:</b><br>Tuesday,<br>Dec. 11 <sup>th</sup><br>5:30 pm<br>SBO – 0 – 99 Emp | <b>GROUP 2</b><br>Tuesday,<br>Dec. 11 <sup>th</sup><br>7:30 pm<br>Female Business Owners |
|---|--|

### ONLINE GROUPS:

|   |  |  |  |
|---|--|--|--|
| <b>GROUP 3:</b><br>Monday,<br>Dec. 10 <sup>th</sup> ,<br>5:30 pm<br>Intermediaries                | <b>GROUP 4:</b><br>Monday,<br>Dec. 10 <sup>th</sup><br>7:30 pm<br>MBO – 100 – 499 Emp          | <b>GROUP 5:</b><br>Wednesday,<br>Dec. 12 <sup>th</sup><br>5:30 pm<br>MBO – 100 – 499 Emp | <b>GROUP 6:</b><br>Wednesday<br>Dec. 12 <sup>th</sup><br>7:30 pm<br>Youth Owners |
| <b>GROUP 7:</b><br>Thursday,<br>Dec. 13 <sup>th</sup><br>5:30 pm<br>MBO – 100 – 499 Emp<br>French | <b>GROUP 8:</b><br>Thursday,<br>Dec. 13 <sup>th</sup><br>7:30 pm<br>SBO – 0 – 99 Emp<br>French |  |  |

The group would last approximately 2 hours and you would receive an incentive of:

|                             |                 |
|-----------------------------|-----------------|
| <b>GROUPS 1 &amp; 2:</b>    | <b>\$300.00</b> |
| <b>GROUP 3:</b>             | <b>\$300.00</b> |
| <b>GROUPS 4, 5 &amp; 7:</b> | <b>\$300.00</b> |
| <b>GROUP 6:</b>             | <b>\$250.00</b> |
| <b>GROUP 8:</b>             | <b>\$250.00</b> |

... as a thank you for your time and participation.

# SCREENER

**CONTINUE FOR GROUPS 1 & 2, IN PERSON:**

LOCATION: CRC UPTOWN  
5075 YONGE ST.  
STE. 601  
TORONTO, ON

SUBWAY: YONGE/NORTH YORK CITY CENTRE STATION

PARKING: MUNICIPAL PARKING IS AVAILABLE

**Read the following important information to IN PERSON participants only:**

- Please arrive 10 – 15 minutes prior to the start of your group
- Please bring glasses if needed for reading
- All groups will be audio and video taped for market research purposes only
- You may be required to show photo i.d. when arriving at the facility
- Your first and last name will be provided to the facility to ensure only the correct individuals participate in the groups

**CONTINUE FOR GROUPS 3 – 8:**

We will send you an incentive cheque following completion of the group. Please specify the mailing address we should send the cheque to:

**During your group you must be:**

- Alone in a quiet location,
- Have access to high speed Internet,
- On your computer or laptop
- Have eyeglasses on hand if they are required for reading

**CONTINUE WITH ALL:**

A confirmation will be e-mailed to you containing all pertinent details.

Please confirm the email address you would like this sent to:

Email: \_\_\_\_\_  
(Interviewer – read back verbatim to confirm)

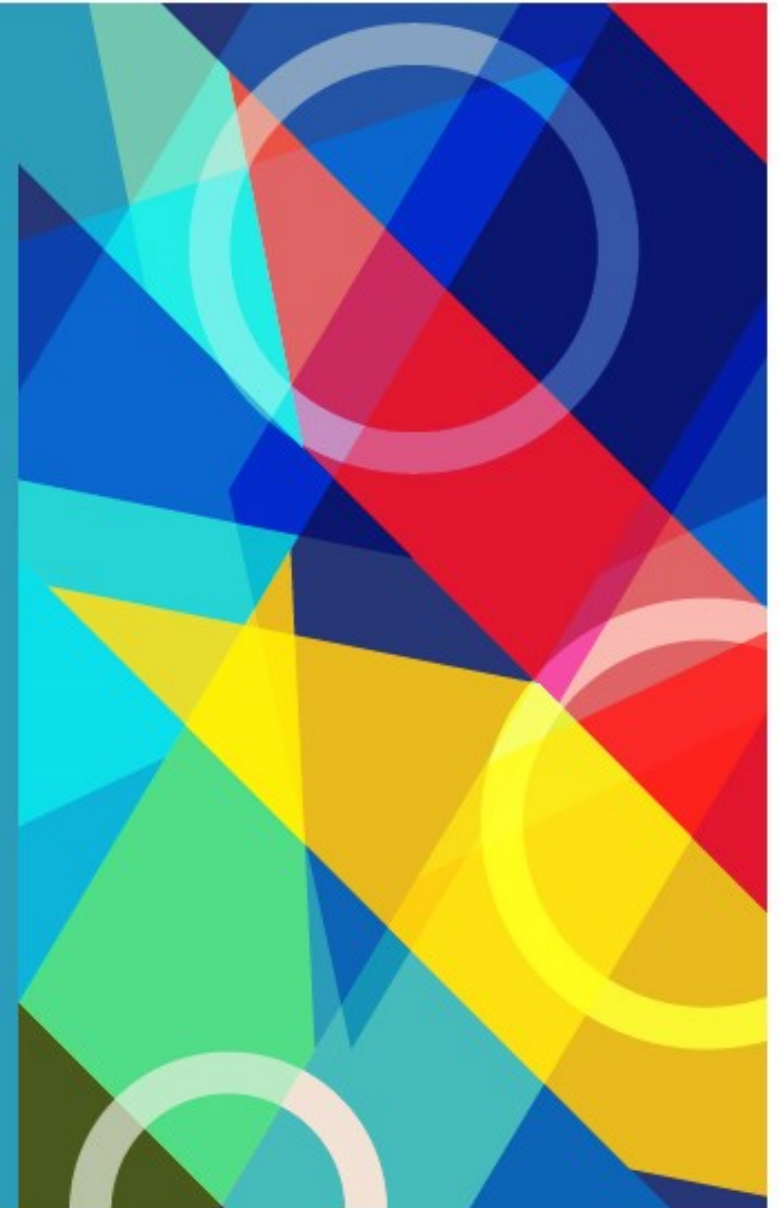
We will call you the day before the interview to remind you of your session.  
At what telephone number can we reach you to confirm the interview?

Phone #: \_\_\_\_\_

We look forward to seeing you. If you have any questions or need to reschedule your group time, please contact our office at \_\_\_\_\_.

**Thank you.**

# C- Qualitative Moderator's Guide



# DISCUSSION GUIDE

## Creative Concept and Business Environment Qualitative Research for Innovation for Success Campaign – Discussion Guide

### INTRODUCTIONS (5 mins)

Put participants at ease and set the rules of engagement for the session.

- Welcome participants
- Description of focus groups
- Specialized facilities – in person group (videotaping, one-way mirror and observers, etc.)
- How to participate – on line groups (recording, observers etc.)
- Anonymity / Confidentiality
- No right or wrong answer – different opinions are what counts
- Independence of moderator

I'm going to go through the list of names again but this time I'd like everyone to introduce themselves to the group. If you hear your name, remember to unmute yourself and tell us...

- Your name
- Type of business that you own, size of business and how long you've been in business
- What attracted you to become an business owner / entrepreneur

### CHALLENGES FACED (10 MINS)

I'd like to understand the challenges that business owners like ourselves face.

Tell me about the challenges or barriers that...

- ...you faced in the initial years of your business?
- ...you face nowadays?
- ...you anticipate facing in the future?

And how much support has there been / is there to help you overcome these challenges?

- Have you turned to anywhere for help? Why / why not?
- Where have you turned to? What was that experience like?
- What would help you?

PROBE IF NOT BROUGHT UP UNPROMPTED:

- WOMEN: Financing?
- YOUNG ENTREPRENEURS: Financing?; Access to mentorship, skills?

### CONCEPT TESTING (80 MINS)

I have 3 advertising concepts that I'd like to get your reactions to.

Everything that you will see is nowhere close to being finished ads like the ones that you are used to seeing. They are at a very early production stage so please **DO NOT** focus on the fact that they are cartoon sketches, the music or lack of or the voices. Instead, I'd like you to focus on the general ideas, messages that they are trying to get across and the way they are trying to get this through to you.

For each concept, I will show you a TV ad and a digital banner.

SHOW EACH CONCEPT AND GIVE PARTICIPANTS TIME TO COMPLETE THE QUESTIONNAIRES.  
ROTATE CONCEPTS AS PER TABLE BELOW

## DISCUSSION GUIDE

|                  | TAGLINE GROUP   | DEC<br>10<br>G1 | DEC<br>10<br>G2 | DEC<br>11<br>G1 | DEC<br>11<br>G2 | DEC<br>12<br>G1 | DEC<br>12<br>G2 | DEC<br>13<br>G1 | DEC<br>13<br>G2 |
|------------------|---|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Concept W        |   |                 |                 |                 |                 |                 |                 |                 |                 |
| What do you need | What do you need?<br>FUNDING – ADVICE – PARTNERSHIPS<br>Find out what the government can do for<br>your business  | 1               | 3               | 2               | 3               | 2               | 1               | 2               | 3               |
| Concept S        |   |                 |                 |                 |                 |                 |                 |                 |                 |
| Simplicity       | Doing what you do is hard<br>Finding government support shouldn't be<br>Tell us your story – Get access to hundreds of<br>government programs for your business<br>Grow from here | 2               | 1               | 3               | 2               | 1               | 3               | 1               | 2               |
| Concept M        |   |                 |                 |                 |                 |                 |                 |                 |                 |
| Moving Fast      | What can you do for your business in 3<br>minutes?<br>START – GROW – EXPORT<br>A lot can be done in 3 minutes<br>Find out what the government can do for<br>your business         | 3               | 2               | 1               | 1               | 3               | 2               | 3               | 1               |

### *Self-completion Questionnaire*

*What is the point of this ad?*

*How does this ad make you feel?*

*Would you do anything after seeing this ad?*

*Who is behind this ad?*

*What was the website shown in the ad?*



# DISCUSSION GUIDE

ONCE EVERYONE IS DONE, START WITH DISCUSSION PROBES:

- What were your overall reactions to the ad and why?

I want to get your views on the concept. We're going to focus on the 3 key components of any advertising:

1. The **main message**, what they're trying to say to you
2. The **creative idea**, how they're trying to say/present that message to you
3. The **call-to-action**, what they're trying to get you to do or think

MAIN MESSAGE VERBAL PROBES

- What is the main message in this concept, what were they trying to say to you?
- Is the main message...
  - Clear? Why/why not?
  - Relevant to you? Why/why not?
  - New information for you? How so?
  - Helpful for you? Why / why not?
  - Persuasive? Why / why not?
- Who is behind this ad?

CREATIVE VERBAL PROBES

- What did you think of the creative idea they are planning to use to get this message across to you? PROBE:
  - Describe it to me in your own words
  - How would you describe the tone of it? Positive; negative; upbeat; realistic? Is this appropriate given message?
  - Likes/Dislikes
  - Attention grabbing/unique – specific visuals, script, etc.? What was your eye drawn to?

CALL TO ACTION PROBES

- What are they trying to get you to do or think? Would you? Why / why not?
- If you were to follow-up, is it clear what the next steps are?
- Do you remember the name of the platform (the url)? What impression are you left of the platform in this concept? Why is that?
- Would you visit the platform after seeing this ad? Why / why not? Did the concept do enough to persuade you that...
  - there is useful information for on the site business owner like yourself?
  - that the platform is simple to use?
  - How so?

PROBES AFTER ALL 3 CONCEPTS ARE SHOWN

- Of the three concepts, which one do you prefer and why? I need everyone to submit an answer on this.
- Is there anything that could be done to improve on the way the information is presented on your preferred concept? What specifically would you suggest and why is that?
- Where should we place this concept to get your attention? Where do you go for information about government funding and programs? Where do you go for your business news?

SHOW TAGLINE GROUPINGS

I'm going to show you some taglines that are used in communication materials to businesses like yours.

What are your immediate reactions to these? Is it...

- ...clear? Why/why not?
- ...speaks to you/you see yourself in this? Why/why not?
- Relevant to your business? Why/why not?
- Attractive to you? How so?/why not?
- Helpful for you? Why / why not?
- Persuasive? Why / why not?

# DISCUSSION GUIDE

## EXPLORING EXPECTATIONS SET BY ADVERTISEMENTS [15 MINUTES]

The platform shown in the concepts, [Innovation.Canada.ca](http://Innovation.Canada.ca), was created to provide a one stop shop for Canada's innovators and entrepreneurs. Were you aware of this platform before today's group discussion? How did you come across it?

- What are your expectations of the [Innovation.Canada.ca](http://Innovation.Canada.ca) after you see this concept?
- What would you expect to find on the platform?
- Is this something you would use for your business/to help source government support for your business clients?
- What does the name 'innovation.canada.ca' say to you?

### Probe on Innovation

- What do you think of when you hear the word "innovation"?
- As entrepreneurs, do you see yourself or your business as innovative?
- Can you think of other government program or services, at any level, that are about or support innovation? If yes, can you tell us why that program comes to mind?

How familiar are you, if at all, of programs that the Government of Canada has to support businesses like yours?

- Can you tell me of any programs, services or policies that are relevant and /or helpful in supporting the success of your business?

Have you ever used online services as a business owner/business advisor?

- What services do you use?
- How would you describe your experience?
- Have there been any barriers? What are they? How can these be overcome?

FOR IN-PERSON GROUPS ONLY I'm going to invite you to look at [Innovation.canada.ca](http://Innovation.canada.ca) itself

- Is this something that would make it easier for you to find the programs and services offered by the Government of Canada to help support businesses like yours?
- Is [innovation.canada.ca](http://innovation.canada.ca) something you would use for your business/to help source resources for your business clients?

## FINAL ADVICE (10 MINS)

We started the groups by asking for your challenges. What would you advise the Government of Canada to prioritize to support your business/industry?

- In the current environment?
- And longer term?

Finally, given everything that we discussed, what is your final advice to the creators of the concepts and / or the Government of Canada?

[Check with backroom for any final questions]

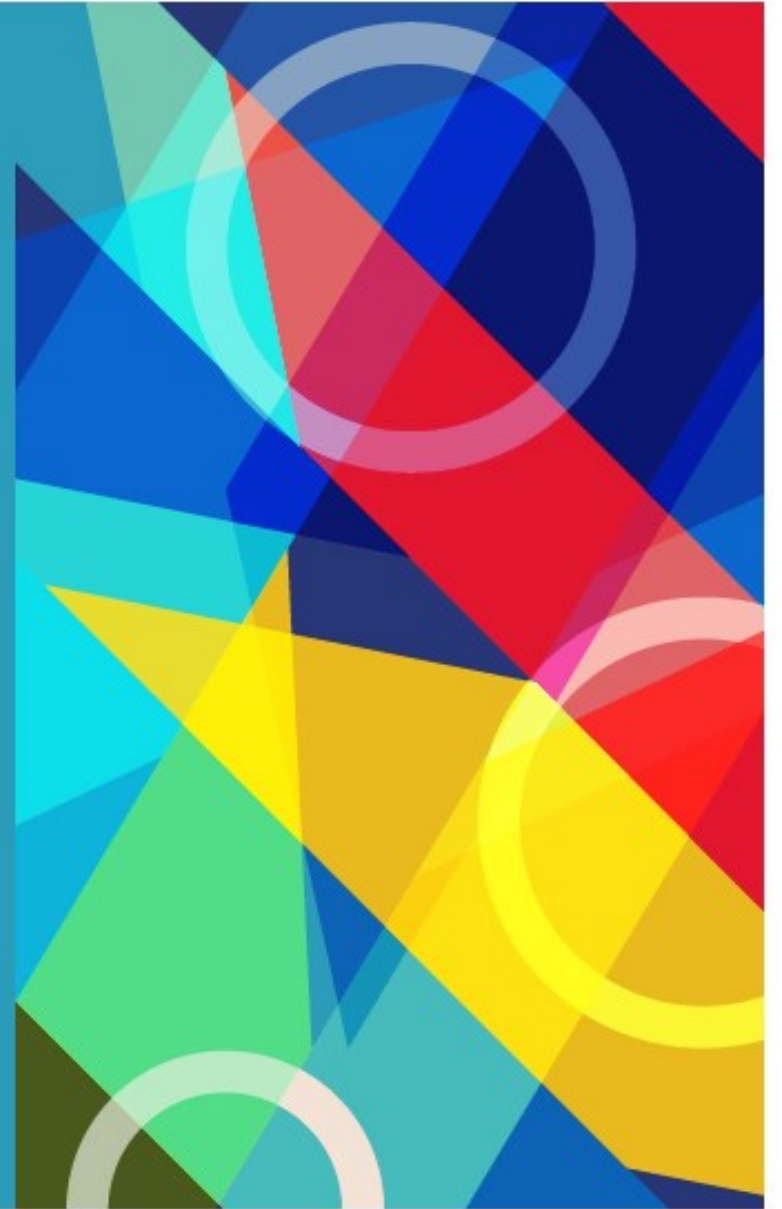
## CLOSE

Thank participants for their time and advice; final housekeeping details.

Total time: 120 minutes



# D- Baseline Survey



# ADVERTISING CAMPAIGN EVALUATION TOOL BASELINE

## INTRODUCTION

Thank you for taking the time to complete this survey dealing with current issues of interest to Canadians. Si vous préférez répondre au sondage en français, veuillez cliquer sur français [SWITCH TO FRENCH VERSION].

**Your participation is voluntary, and your responses will be kept entirely confidential.** The survey takes about 15 minutes to complete.

START SURVEY

To view our privacy policy, [click here](#).

S1. Do you own or operate a small business?

Yes  
No

**[IF YES SKIP TO S3, OTHERWISE CONTINUE]**

S2. Do you work for a business that operates in the private sector? Excludes government, Crown corporations, hospitals, public education institutions, not-for-profit organizations.

Yes  
No

**[IF NO THANK AND TERMINATE, OTHERWISE CONTINUE]**

S3. How many full-time staff does the company you own, or work for, employ in Canada? (Select one only)

0  
1-4  
5-24  
25-49  
50-99  
100-249  
250-499  
500 or more

**[IF S1 = YES SKIP TO S5, OTHERWISE CONTINUE]**

S4. In your current role do you contribute to the overall direction of the business?

Yes  
No

S5. What is your current title? (select one)

Owner/Operator  
CEO/CFO/COO  
EVP/SVP/VP/Director  
Manager  
Other

## ADVERTISING CAMPAIGN EVALUATION TOOL BASELINE SURVEY

[IF S1 = YES AND S3 <5 RESPONDENT QUALIFIES AS “MICRO” CONTINUE]

[IF (S1 = YES AND S3 = 5-99) OR (S3=5-99 AND (S4 =1 OR S5 = CODE 1- 4))

RESPONDENT QUALIFIES AS “SMALL” CONTINUE]

[IF (S1 = YES AND S3 = 100-499) OR (S3 = 100-499 AND (S4 = YES OR S5 =CODE 1-4) RESPONDENT QUALIFIES AS “MEDIUM” CONTINUE]

[ALL OTHERS THANK AND TERMINATE]

S6. Is your company’s primary line of business advertising, media, marketing or marketing research?

Yes

No

[IF NO CONTINUE, OTHERWISE THANK AND TERMINATE]

S7. Approximately how many years has your business been in operation?

[TEXT BOX]

S8. And would you say your business/ head office is located in ...

An urban location

A suburban location

A rural location

S9. Which of the following industry sectors best describes your company's main business?  
(select one only)

Agriculture/Fishing/Hunting/ Forestry

Oil/Gas/Mining

Utilities

Construction

Manufacturing

Wholesale Trade

Retail Trade

Transportation and Warehousing

Information and Cultural Industries

Finance and Insurance/Real Estate and Rental

Professional, Scientific and Technical Services / IT / Computers

Administrative and Support

Waste Management

Remediation Services

Art/Entertainment/Recreation

Accommodation/Food Services/Tourism

Other (specify)

### Main Questionnaire

a) Are you...

male

female

other

prefer not to disclose

# ADVERTISING CAMPAIGN EVALUATION TOOL BASELINE SURVEY

b) In which of the following age categories do you belong?

SELECT ONE ONLY

- less than 18 years old
- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 or older

IF “LESS THAN 18 YEARS OLD” THANK AND TERMINATE

c) In which province or territory do you live?

SELECT ONE ONLY

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland and Labrador
- Northwest Territories
- Nova Scotia
- Nunavut
- Ontario
- Prince Edward Island
- Quebec
- Saskatchewan
- Yukon

## CORE QUESTIONS

ASK ALL RESPONDENTS

Q1:

Over the past three weeks, have you seen, read or heard any advertising from the Government of Canada?

yes

no [IF NO GO TO T1A]

Q2:

Think about the most recent ad from the Government of Canada that comes to mind. Where have you seen, read or heard this ad?

SELECT ALL THAT APPLY

- cinema
- Facebook
- Internet website
- magazines
- newspaper (daily)
- newspaper (weekly or community)
- outdoor billboards
- pamphlet or brochure in the mail
- public transit (bus or subway)
- radio
- television
- Twitter
- YouTube
- Instagram
- LinkedIn
- Snapchat
- Spotify
- Reddit
- Google
- Other, specify \_\_\_\_\_

# ADVERTISING CAMPAIGN EVALUATION TOOL BASELINE SURVEY

Q3:

What do you remember about this ad?

[TEXT BOX]

Q4:

How did you know that it was an ad from the Government of Canada?

[TEXT BOX]

## CAMPAIGN SPECIFIC QUESTIONS

ASK ALL RESPONDENTS

T1A:

Over the past three weeks, have you seen, read or heard any Government of Canada advertising about helping businesses grow?

Yes

No

[IF NO GO TO T1D]

T1B:

Where have you seen, read or heard this Government of Canada ad about helping businesses grow?

**SELECT ALL THAT APPLY**

cinema

Facebook

Internet website

magazines

newspaper (daily)

newspaper (weekly or community)

outdoor billboards

pamphlet or brochure in the mail

public transit (bus or subway)

radio

television

Twitter

YouTube

Instagram

LinkedIn

Snapchat

Spotify

Reddit

Google

Other, specify \_\_\_\_\_

T1C:

What do you remember about this ad?

[TEXT BOX]

# ADVERTISING CAMPAIGN EVALUATION TOOL BASELINE SURVEY

## ASK ALL RESPONDENTS

### CAMPAIGN SPECIFIC ATTITUDINAL AND BEHAVIOURAL QUESTIONS MAY BE ADDED HERE

T1D. Would you know where to find information about Government of Canada programs that you could access to help your business?

Yes  
No

### [IF YES ASK T2D, OTHERWISE SKIP TO T3D]

T2D. Where would you go? [TEXT BOX]

T3D. The Government of Canada has built a website designed to help Canadian entrepreneurs and businesses find government help for their business in one location. It provides a variety of information, including details about funding and loans as well as expert advice and support tailored to your specific business needs. Before today, were you aware of this website?

Yes  
No

### [IF YES ASK T4D OTHERWISE SKIP TO T5D]

T4D. Do you remember the website? Please type it below.

[TEXT BOX]

T5D. The website we are talking about is [innovation.canada.ca](http://innovation.canada.ca), have you visited the website before today?

Yes  
No

T6D: How would you describe the current business environment in Canada when it comes to...?

### [grid rows]

Availability of skilled labour/employees  
Ease of securing capital/business loans  
Ability to increase productivity through R&D, technology  
Support for innovation and development  
Available tax credits  
Competitive tax rates

### [grid columns]

Very good  
Somewhat good  
Somewhat poor  
Very poor  
Don't know

## ADVERTISING CAMPAIGN EVALUATION TOOL BASELINE SURVEY

T7D: What are the greatest challenges your business is currently facing? (Select up to 3)

Securing financing/loans  
Product development and testing  
Marketing/building customer base  
Finding and retaining the right people  
Increasing productivity  
Increasing profitability  
Meeting regulations/standards  
Responding to market conditions  
Responding to competitors  
Finding partnerships or mentorship  
Other (specify)

T8D: Which of the following most closely reflects the ways your business is innovating or would like to innovate? (Select all that apply)

Creating new products/services  
Expanding existing products/services into new markets  
Finding ways to do what we do now more efficiently  
Finding more effective ways of marketing products/services  
Finding more digital or online offerings/ecommerce  
Other changes that involve new technology you haven't used before  
Other (specify)  
We are not focused on innovation right now **[EXCLUSIVE]**

**[IF NOT FOCUSED ON INNOVATION SKIP TO T10D]**

T9D: What challenges, if any, are you facing that prevent you from innovating in these ways? (Select all that apply)

Lack of money or cost  
Lack of time or resources  
Lack of interest and motivation from staff  
Lack of information or knowledge  
Lack of expertise or necessary skills  
Market barriers  
Other (specify)  
None **[EXCLUSIVE]**

T10D: Would you describe your business or the one you work for as any of the following? (Select all that apply)

A start-up  
A STEM (science, technology, engineering or math) company  
An innovative company  
A company looking to expand into new markets  
None of these **[EXCLUSIVE]**

# ADVERTISING CAMPAIGN EVALUATION TOOL BASELINE SURVEY

T11D How much do you agree or disagree with each of the following statements, in general...

**[COLUMNS]**

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree
- Don't know

**[GRID ROWS] – RANDOMIZE ORDER**

The Government of Canada is doing a good job at helping businesses like yours succeed  
The Government of Canada understands challenges facing business owners  
The Government of Canada is providing businesses with the right support to help them overcome obstacles to success  
The Government of Canada is doing a good job at creating the right economic conditions for businesses to succeed

T12D. What Is the Government of Canada doing right when it comes to helping businesses succeed? **[TEXT BOX]**  
Nothing  
Don't know

T13D. What Is the Government of Canada doing wrong when it comes to helping businesses succeed? **[TEXT BOX]**  
Nothing  
Don't know

T15D. The Government of Canada has identified several priorities to support businesses in Canada. For each of the following, please indicate how much emphasis you think should be placed on that area, where '1' means not much emphasis, and '5' a great deal of emphasis

**[COLUMNS]**

- 1 – Not much emphasis
- 2
- 3
- 4
- 5 – A great deal of emphasis
- Don't know

**[GRID ROWS – RANDOMIZE]**

Encouraging Canadian businesses to innovate  
Promoting and maintaining fair competition in the market  
Helping businesses access start-up financing  
Helping businesses access new markets  
Supporting regional economic development  
Improving connectivity in rural and remote areas of Canada  
Promoting the development of clean technology  
Having a competitive business tax regime  
Helping businesses protect and use their intellectual property for commercial success  
Helping businesses ready to scale up and grow access financing  
Improving the government service experience online for business  
Making it easier to find the right government programs for your business





# ADVERTISING CAMPAIGN EVALUATION TOOL BASELINE SURVEY

T16D. How would you rate the performance of the Government of Canada in each of these same areas; indicate '1' to indicate a very poor job, and '5', a very good job...

**[COLUMNS]**

- 1 – Very poor job
- 2
- 3 – Neutral
- 4
- 5 – Very good job
- Don't know

**[GRID ROWS – RANDOMIZE]**

- Encouraging Canadian businesses to innovate
- Promoting and maintaining fair competition in the market
- Helping businesses access start-up financing
- Helping businesses access new markets
- Supporting regional economic development
- Improving connectivity in rural and remote areas of Canada
- Promoting the development of clean technology
- Having a competitive business tax regime
- Helping businesses protect and use their intellectual property for commercial success
- Helping businesses ready to scale up and grow access financing
- Improving the government service experience online for business
- Making it easier to find the right government programs for your business

T17D. There are many ways that people, and business owners specifically, may come across information that is useful their business.  
Which of the following sources do you regularly access or come into contact with?  
(Select all that apply)

- Cinema ads
- Internet
- magazines
- newspaper (daily)
- newspaper (weekly or community)
- public transit (bus or subway)
- radio
- television
- Twitter
- YouTube
- Instagram
- LinkedIn
- Facebook
- Snapchat
- Spotify
- Reddit
- Google
- Other, specify \_\_\_\_\_

# ADVERTISING CAMPAIGN EVALUATION TOOL BASELINE SURVEY

## DEMOGRAPHIC QUESTIONS

D5:  
Where were you born?

born in Canada  
born outside Canada

➡ Please specify the country [TEXT BOX]

### ASK IF D5=BORN OUTSIDE CANADA

D6:  
In what year did you first move to Canada?  
[TEXT BOX YYYY]

ADMISSABLE RANGE: 1900-2018

D9: What is your main ethnic background? (select all that apply)

Indigenous Canadian (First Nations (North American Indian), Métis or Inuk (Inuit))  
African Canadian  
Chinese  
Caucasian  
East Asian  
East Indian  
Filipino  
Hispanic  
Korean  
Pakistani  
Other  
Prefer not to answer

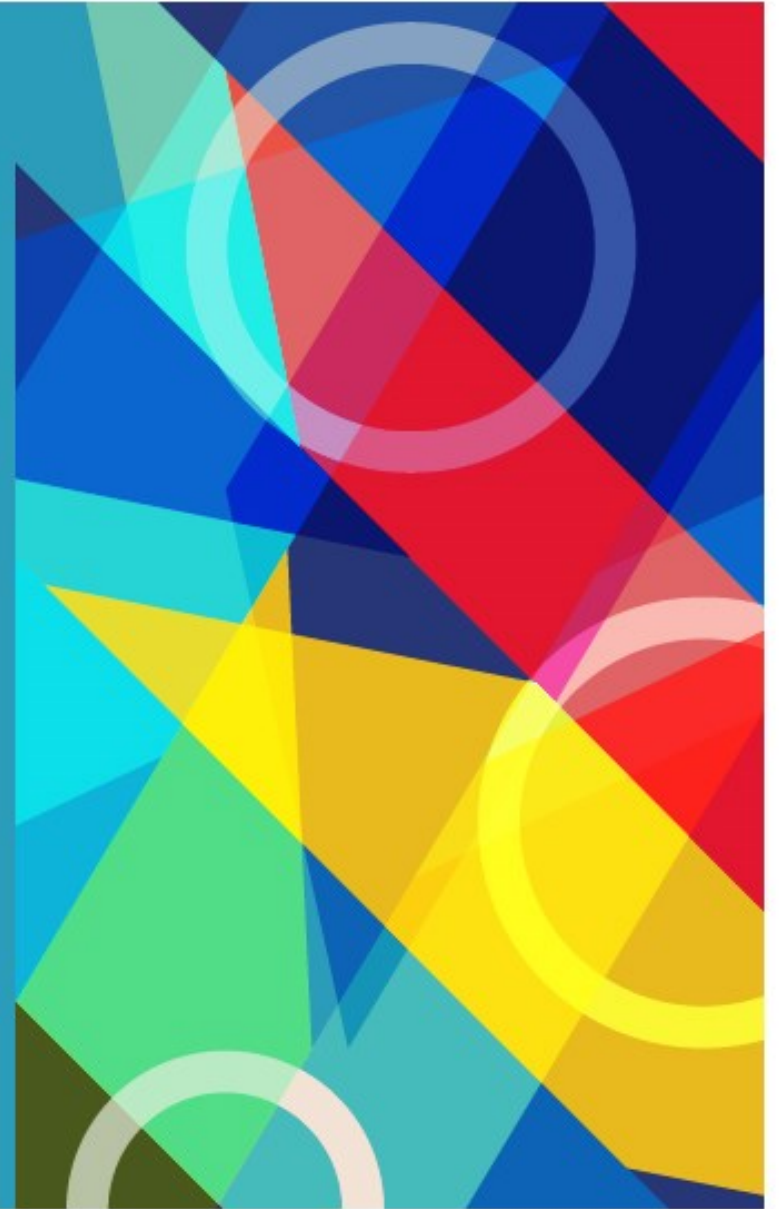
D10: Which of the following best describes how you think of yourself?

Male gender  
Female gender  
Gender diverse

**That concludes the survey. This survey was conducted on behalf of Innovation, Science and Economic Development Canada.**

**In the coming months the report will be available from Library and Archives Canada. We thank you very much for taking the time to answer this survey, it is greatly appreciated**

# E- Post- Campaign Survey



# ADVERTISING CAMPAIGN EVALUATION TOOL POST-CAMPAIGN SURVEY

## INTRODUCTION

Thank you for taking the time to complete this survey dealing with current issues of interest to Canadians. Si vous préférez répondre au sondage en français, veuillez cliquer sur français [SWITCH TO FRENCH VERSION].

**Your participation is voluntary, and your responses will be kept completely anonymous.** The survey takes about 15 minutes to complete.

START SURVEY

To view our privacy policy, [click here](#).

S1. Do you own or operate a small business?

Yes  
No

[IF YES SKIP TO S3, OTHERWISE CONTINUE]

S2. Do you work for a business that operates in the private sector? Excludes government, Crown corporations, hospitals, public education institutions, not-for-profit organizations.

Yes  
No

[IF NO THANK AND TERMINATE, OTHERWISE CONTINUE]

S3. How many full-time staff does the company you own, or work for, employ in Canada? (Select one only)

0  
1-4  
5-24  
25-49  
50-99  
100-249  
250-499  
500 or more

[IF S1 = YES SKIP TO S5, OTHERWISE CONTINUE]

S4. In your current role do you contribute to the overall direction of the business?

Yes  
No

S5. What is your current title? (select one)

Owner/Operator  
CEO/CFO/COO  
EVP/SVP/VP/Director  
Manager  
Other

## ADVERTISING CAMPAIGN EVALUATION TOOL POST-CAMPAIGN SURVEY

[IF S1 = YES AND S3 <5 RESPONDENT QUALIFIES AS “MICRO” CONTINUE]

[IF (S1 = YES AND S3 = 5-99) OR (S3=5-99 AND (S4 =1 OR S5 = CODE 1- 4))

RESPONDENT QUALIFIES AS “SMALL” CONTINUE]

[IF (S1 = YES AND S3 = 100-499) OR (S3 = 100-499 AND (S4 = YES OR S5 =CODE 1-4) RESPONDENT QUALIFIES AS “MEDIUM” CONTINUE]

[ALL OTHERS THANK AND TERMINATE]

S6. Is your company’s primary line of business advertising, media, marketing or marketing research?

Yes

No

[IF NO CONTINUE, OTHERWISE THANK AND TERMINATE]

S7. Approximately how many years has your business been in operation?

[TEXT BOX]

S8. And would you say your business/ head office is located in ...

An urban location

A suburban location

A rural location

S9. Which of the following industry sectors best describes your company's main business?  
(select one only)

Agriculture/Fishing/Hunting/ Forestry

Oil/Gas/Mining

Utilities

Construction

Manufacturing

Wholesale Trade

Retail Trade

Transportation and Warehousing

Information and Cultural Industries

Finance and Insurance/Real Estate and Rental

Professional, Scientific and Technical Services / IT / Computers

Administrative and Support

Waste Management

Remediation Services

Art/Entertainment/Recreation

Accommodation/Food Services/Tourism

Other (specify)

### Main Questionnaire

a) Are you...

male

female

other

prefer not to disclose

ADVERTISING CAMPAIGN EVALUATION TOOL POST-CAMPAIGN SURVEY

b) In which of the following age categories do you belong?

SELECT ONE ONLY

- less than 18 years old
- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 or older

IF “LESS THAN 18 YEARS OLD” THANK AND TERMINATE

c) In which province or territory do you live?

SELECT ONE ONLY

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland and Labrador
- Northwest Territories
- Nova Scotia
- Nunavut
- Ontario
- Prince Edward Island
- Quebec
- Saskatchewan
- Yukon

CORE QUESTIONS

ASK ALL RESPONDENTS

Q1:

Over the past three months, have you seen, read or heard any advertising from the Government of Canada?

yes

no [IF NO GO TO T1A]

Q2:

Think about the most recent ad from the Government of Canada that comes to mind. Where did you see, read or hear this ad?

SELECT ALL THAT APPLY

- cinema
- Facebook
- Internet website
- magazine
- newspaper (daily)
- newspaper (weekly or community)
- outdoor billboard
- pamphlet or brochure in the mail
- public transit (bus or subway)
- radio
- television
- Twitter
- YouTube
- Instagram
- LinkedIn
- Snapchat
- Spotify
- Reddit
- Google
- Video that appears on an app
- Other, specify \_\_\_\_\_

## ADVERTISING CAMPAIGN EVALUATION TOOL POST-CAMPAIGN SURVEY

Q3:

What do you remember about this ad? **[TEXT BOX]**

Q4:

How did you know that it was an ad from the Government of Canada? **[TEXT BOX]**

### CAMPAIGN SPECIFIC QUESTIONS

ASK ALL RESPONDENTS

T1A:

Over the past three months, have you seen, read or heard any Government of Canada advertising about helping businesses grow?

Yes

No

**[IF NO GO TO T1D]**

T1B:

Where did you see, read or hear this Government of Canada ad about helping businesses grow?

**SELECT ALL THAT APPLY**

cinema

Facebook

Internet website

magazine

newspaper (daily)

newspaper (weekly or community)

outdoor billboard

pamphlet or brochure in the mail

public transit (bus or subway)

radio

television

Twitter

YouTube

Instagram

LinkedIn

Snapchat

Spotify

Reddit

Google

Video that appears on an app

Other, specify \_\_\_\_\_

T1C:

What do you remember about this ad? **[TEXT BOX]**

# ADVERTISING CAMPAIGN EVALUATION TOOL POST-CAMPAIGN SURVEY

## ASK ALL RESPONDENTS

### CAMPAIGN SPECIFIC ATTITUDINAL AND BEHAVIOURAL QUESTIONS MAY BE ADDED HERE

T1D. Would you know where to find or how to access information about Government of Canada programs that could help your business?

Yes  
No

#### [IF YES ASK T2D, OTHERWISE SKIP TO T3D]

T2D. Where would you go? [TEXT BOX]

T3D. The Government of Canada has built a website designed to help Canadian entrepreneurs and businesses find government help for their business in one location. It provides a variety of information, including details about funding and loans as well as expert advice and support tailored to your specific business needs. Before today, were you aware of this website?

Yes  
No

#### [IF YES ASK T4D OTHERWISE SKIP TO T5D]

T4D. Do you remember the website? Please type it below.

[TEXT BOX]

T5D. The website we are talking about is [innovation.canada.ca](http://innovation.canada.ca). Have you visited the website before today?

Yes  
No

T6D. The Government of Canada has identified potential priorities it can pursue to support businesses in Canada. Which would be most beneficial to your business? (Select up to five)

Improved access to financing  
Improved access to talent / skilled workforce  
Improved access to the equipment and tools businesses need to grow and scale up  
Policies to protect your ideas (intellectual property rights protection)  
Help your business access appropriate government programs as your business needs change  
Policies to help Canadian businesses expand into new markets abroad  
Policies to help Canadian entrepreneurs and SMEs develop innovative technologies  
Policies to help Canadian entrepreneurs and SMEs bring innovative technologies to market  
Attract large-scale investments through funding for research and development over \$10M  
Promote large-scale business-academia collaborations  
Develop Canadian innovation superclusters  
Help businesses develop supply chains  
Reduced regulations or red tape  
Improved access to venture capital  
Promoting exports  
Develop international trade  
Improve internal trade  
Improved broadband access in rural and remote areas of Canada  
Other (specify)  
None [EXCLUSIVE]



## ADVERTISING CAMPAIGN EVALUATION TOOL POST-CAMPAIGN SURVEY

**[RANDOMLY ASSIGN EACH RESPONDENT TO ONE OF: T7D\_a, T7D\_b, T7D\_c, T7D\_d, T7D\_e]**

T7D\_a. For some businesses, a major challenge is increasing their profitability. Which of the following, if any, best describe how your business is tackling increased profitability? (Select up to 3)

**[RANDOMIZE ORDER EXCEPT LAST]**

Cutting facility costs  
Retrofitting facilities  
Reducing energy costs  
Adjusting staffing (reducing, hiring, retaining)  
Unlocking new markets  
Adopting new digital technologies  
Accessing new capital  
Increasing product prices  
Increasing production capacity  
Innovating to improve efficiency  
Other (specify)  
None **[EXCLUSIVE]**

T7D\_b. For some businesses, a lack of money is a common barrier to innovation. What type of funding supports, if any, would be most helpful in meeting this challenge? (Select up to 3)

**[RANDOMIZE ORDER EXCEPT LAST]**

Improved access to government contracts and procurement  
Access to expertise in raising funding  
Access to expertise in managing funding  
Funding to sustain early growth

Funding to sustain scaling up under Canadian ownership  
Funding scaled to my business requirement  
Late-stage venture capital (\$100M+)  
Competitive tax rates  
Financing on intangible assets (such as intellectual property)  
Other (specify)  
None **[EXCLUSIVE]**

T7D\_c. For some businesses, a major concern is finding and retaining people with the right talent and skills. Which of the following type of talent, if any, does your business have difficulty finding or retaining? (Select up to 3)

**[RANDOMIZE ORDER EXCEPT LAST]**

Leaders with experience in scaling up businesses  
R&D or technical project managers  
Deep technical talent  
Innovation talent  
Scientific and research talent  
Marketing and sales talent  
International talent  
Skilled workers  
Temporary foreign skilled workers  
Board members with scale-up experience  
Women board members  
Executive talent outside major urban centers  
Other (specify)  
None **[EXCLUSIVE]**

# ADVERTISING CAMPAIGN EVALUATION TOOL POST-CAMPAIGN SURVEY

T7D\_d. For some, the ability to bring products to market and grow their business can be improved through the modernization of government regulations. Which of the following, if any, are barriers to the growth of your business? (Select up to 3)

**[RANDOMIZE ORDER EXCEPT LAST]**

- Duplicate federal, provincial, municipal regulations
- Unknown/anonymous point of contact for dealing with government regulations
- Receiving inconsistent advice about government regulations
- Regulatory blocks to hiring foreign workers
- Regulatory blocks in recognition of foreign credentials or experience
- Outdated regulations
- Standards inconsistent with international norms
- Other (specify)
- None **[EXCLUSIVE]**

T7D\_e. Some businesses need to access new markets to grow. Which of the following, if any, would help your business better access new markets? (Select up to 2)

**[RANDOMIZE ORDER EXCEPT LAST]**

- Smaller government loans designed to help firms entering new markets
- Outreach and education on how to protect, register and enforce Canadian intellectual property (IP)
- Concierge services providing tailored help to firms entering new markets
- Better access to government contracts and procurement
- Other (specify)
- None **[EXCLUSIVE]**

T10D. Would you describe your business or the one you work for as any of the following? (Select all that apply)

- A start-up or aspiring start-up business
- A scale-up or aspiring scale-up business
- A STEM (science, technology, engineering or math) company
- An established business looking to innovate
- An established business looking to unlock new markets
- A woman-led business
- An Indigenous-led business
- A rural business
- An urban business
- None of these **[EXCLUSIVE]**

T11D. How much do you agree or disagree, in general, with each of the following statements?

**[COLUMNS]**

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree
- Don't know

**[GRID ROWS] – RANDOMIZE ORDER**

- The Government of Canada is doing a good job in helping businesses like yours succeed.
- The Government of Canada understands challenges facing business owners.
- The Government of Canada is providing businesses with the right support to help them overcome obstacles to success.
- The Government of Canada is doing a good job at creating the right economic conditions for businesses to succeed.

ADVERTISING CAMPAIGN EVALUATION TOOL POST-CAMPAIGN SURVEY INNOVATION.CANADA.CA

T12D. What is the Government of Canada doing right when it comes to helping businesses succeed?

[TEXT BOX]

Nothing  
Don't know

T13D. What is the Government of Canada doing wrong when it comes to helping businesses succeed?

[TEXT BOX]

Nothing  
Don't know

T15D. The Government of Canada has identified several priorities to support businesses in Canada. For each of the following, please indicate how much emphasis you think should be placed on that area, where "1" means not much emphasis and "5" means a great deal of emphasis.

[COLUMNS]

1 – Not much emphasis  
2  
3  
4  
5 – A great deal of emphasis  
Don't know

[GRID ROWS – RANDOMIZE]

Encouraging Canadian businesses to innovate  
Promoting and maintaining fair competition in the market  
Helping businesses access start-up financing  
Helping businesses access new markets  
Supporting regional economic development  
Improving connectivity in rural and remote areas of Canada  
Promoting the development of clean technology  
Having a competitive business tax regime  
Helping businesses protect and use their intellectual property for commercial success  
Helping businesses ready to scale up and grow access financing  
Improving the government service experience online for business  
Making it easier to find the right government programs for your business

T16D. How would you rate the performance of the Government of Canada in each of these same areas, where "1" indicates a very poor job and "5" indicates a very good job?

[COLUMNS]

1 – Very poor job  
2  
3 – Neutral  
4  
5 – Very good job  
Don't know



## ADVERTISING CAMPAIGN EVALUATION TOOL POST-CAMPAIGN SURVEY

### [GRID ROWS – RANDOMIZE]

Encouraging Canadian businesses to innovate  
Promoting and maintaining fair competition in the market  
Helping businesses access start-up financing  
Helping businesses access new markets  
Supporting regional economic development  
Improving connectivity in rural and remote areas of Canada  
Promoting the development of clean technology  
Having a competitive business tax regime  
Helping businesses protect and use their intellectual property for commercial success  
Helping businesses ready to scale up and grow access financing  
Improving the government service experience online for business  
Making it easier to find the right government programs for your business

For the next few questions, please indicate if you have seen the following ads.

**[ROTATE THE ORDER OF T18D\_a, T18D\_b, T18D\_c, T18D\_d]**

T18D\_a. **[Insert TV ad]**

Over the past three months, have you seen this ad?

yes

no

T18D\_b. **[Insert LinkedIn ad designed for women entrepreneurs]**

Over the past three months, have you seen this ad?

yes

no

T18D\_c. **[Insert digital banner ad “C”]**

Over the past three months, have you seen this ad?

yes

no

T18D\_d. **[Insert print ad / not the native advertising]**

Over the past three months, have you seen this ad?

yes

no

**[IF NO TO ALL (T18D\_a through T18D\_d) SKIP TO TIJ]**

ADVERTISING CAMPAIGN EVALUATION TOOL POST-CAMPAIGN SURVEY

T1I:

Where have you seen, read or heard these ads?

SELECT ALL THAT APPLY

- cinema
- Facebook
- Internet website
- magazines
- newspaper (daily)
- newspaper (weekly or community)
- outdoor billboards
- pamphlet or brochure in the mail
- public transit (bus or subway)
- radio
- television
- Twitter
- YouTube
- Instagram
- LinkedIn
- Snapchat
- Spotify
- Reddit
- Google
- video that appears on an app
- Other, specify \_\_\_\_\_

T1J:

What do you think is the main point these ads are trying to get across? [TEXT BOX]

T1K:

Please indicate your level of agreement with the following statements about these ads.

RANDOMIZE STATEMENTS

[COLUMNS]

- 1 – Strongly disagree
- 2
- 3
- 4
- 5 – Strongly agree

[ROWS]

- These ads catch my attention.
- These ads are relevant to me.
- These ads are difficult to follow.
- These ads do not favour one political party over another.
- These ads talk about an important topic.
- These ads provide new information.
- These ads clearly convey that the Government of Canada has built a website to help Canadian entrepreneurs and businesses.
- This website will help your business.
- These ads clearly convey that the Government of Canada is trying to help businesses like yours.

# ADVERTISING CAMPAIGN EVALUATION TOOL POST-CAMPAIGN SURVEY

## DEMOGRAPHIC QUESTIONS

D5:  
Where were you born?

born in Canada  
born outside Canada

➔ Please specify the country [TEXT BOX]

### ASK IF D5=BORN OUTSIDE CANADA

D6:  
In what year did you first move to Canada?

[TEXT BOX YYYY]

ADMISSABLE RANGE: 1900-2019

D9: What is your main ethnic background? (select all that apply)

Indigenous Canadian (First Nations (North American Indian), Métis or Inuk (Inuit))  
African Canadian  
Chinese  
Caucasian  
East Asian  
East Indian  
Filipino  
Hispanic  
Korean  
Pakistani  
Other  
Prefer not to answer

D10: Which of the following best describes how you think of yourself?

Male gender  
Female gender  
Gender diverse

**That concludes the survey. This survey was conducted on behalf of Innovation, Science and Economic Development Canada.**

**In the coming months the report will be available from Library and Archives Canada. We thank you very much for taking the time to answer this survey, it is greatly appreciated**