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2023 to 2024 Competition Bureau Stakeholder Awareness and Influence Survey

Executive Summary

Prepared for Innovation, Science and Economic Development Canada

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This public opinion research report presents the results of online surveys, a telephone survey, focus groups and in-depth interviews conducted by Earnscliffe Strategy Group on behalf of Innovation, Science and Economic Development Canada. The fieldwork was conducted in February and March 2024.

Cette publication est aussi disponible en français sous le titre : Recherche de 2023 à 2024 sur la sensibilisation et l'influence des parties prenantes du Bureau de la concurrence.

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Executive summary

Earnscliffe Strategy Group (Earnscliffe) is pleased to present this report to Innovation, Science and Economic Development Canada (ISED) summarizing the results of qualitative and quantitative research into stakeholder awareness and impressions of the Competition Bureau.

The Competition Bureau (the Bureau) plays an important role in ensuring that Canadian businesses and consumers prosper in a competitive and innovative marketplace. An important part of the Bureau's work to safeguard a fair marketplace involves promoting its activities so that businesses know how to be compliant with Canada's competition laws; consumers and businesses have the information they need to protect themselves from anti-competitive and deceptive marketing practices; and regulators and policymakers consider competition when setting regulations and policies.

To help expand their knowledge and to track awareness and impressions over time, the Bureau contracted Earnscliffe to conduct another wave of research into stakeholders' awareness and impressions. A baseline understanding of awareness and impressions was established in 2019-20 when Earnscliffe was retained to conduct a similar qualitative and quantitative research study titled, *2019-20 Competition Bureau Stakeholder Awareness and Influence Survey*.

This wave, the Bureau was looking to collect and compare how each stakeholder group's awareness had evolved over time and to what extent stakeholders understood its work and the extent to which that awareness influences their activities or decision-making.

To meet these objectives, Earnscliffe conducted a comprehensive two-phased qualitative and quantitative research program. The first phase involved qualitative research including a series of eight focus groups with Canadian consumers and decision-makers in small to medium sized-businesses (SMBs); and, fourteen in-depth interviews with decision-makers in global multinationals and regulatory/policymaking roles. The second phase involved quantitative research including an online survey of 1,037 consumers, 407 decision-makers in SMBs; 48 decision-makers in global multinational companies; and, 21 regulators/policymakers. Additionally, we conducted 10 telephone interviews with decision-makers in global multinational companies (for a total of 58 cases). The contract value for this project was \$199,980.62 including HST.

Qualitative research approach

Of the eight focus groups, two were conducted with Canadian consumers and six with decision-makers in SMBs. For each group, a maximum of eight (8) individuals were recruited as participants. In total, 57 people participated in the focus group discussions. The groups were conducted online (Zoom) on February 27th and 28th, 2024. Three groups (one with consumers and two with decision-makers in SMBs) were conducted in French and five groups (one with consumers and four with decision-makers in SMBs) were conducted in English. Each group was approximately 90 minutes in length. Canadian consumers were given an honorarium of \$100 as a token of appreciation for their time, while decision-makers in SMBs received \$350.

With respect to the in-depth interviews, seven (7) interviews were conducted with decision-makers in global multinational companies, and seven (7) interviews were conducted with regulators and policymakers across Canada. The interviews were conducted by videoconference (Teams) or telephone, depending on the interviewees’ preference between February 28th and March 22nd, 2024. The interviews were approximately 30 to 45 minutes in length.

It is important to note that qualitative research is a form of scientific, social, policy and public opinion research. Focus group research is not designed to help a group reach a consensus or to make decisions, but rather to elicit the full range of ideas, attitudes, experiences and opinions of a selected sample of participants on a defined topic. Because of the small numbers involved, the participants cannot be expected to be thoroughly representative in a statistical sense of the larger population from which they are drawn, and findings cannot reliably be generalized beyond their number.

Quantitative research approach

The second phase of the research involved a survey of Canadian consumers, decision-makers at SMBs and multinational organizations, and regulators and policymakers. In total, 1,472 individuals completed the surveys. The sample size breakdown by audience segment is as follows:

Canadian consumers	1,034
Small and Medium businesses (SMBs)	407
Small and Medium-sized businesses that are also global multinationals (multinationals); included in 407 SMBs	48
Global multinationals (multinationals) (phone)	10
Canadian regulators and policymakers	21
Total	1,472

The length of interview for each audience was as follows:

- Consumers: 13 minutes
- SMBs: 14 minutes
- Multinationals (phone): 11 minutes
- Policymakers & regulators: 17 minutes

The surveys of Canadian consumers and SMBs were conducted online using Leger’s opt-in panel. The survey of consumers was in-field from February 27 to March 11, 2024, and for SMBs from March 18-20, 2024. The final sample of consumers was weighted by age, region and gender to reflect the makeup of the Canadian population 18+ as per the 2016 Census. The SMB sample was weighted by business size according to Statistics Canada’s Canadian Business Counts, with employees. The survey of regulators and policymakers was conducted online from March 4-19, 2024, and the data was not weighted.

We originally intended to conduct all the interviews with decision-makers at multinational companies by phone. However, due to the length of the questionnaire used, the data collection by phone proceeded slowly and achieving the 50 completes by phone was deemed unfeasible.

Consequently, the analysis of the multinationals in this report includes the 10 completes done by phone, in addition to 48 responses from SMBs online that also happened to be multinationals. By combining the data in this way, we were able to achieve a sample size suitable for analysis that is also consistent with the approach used in 2019-20 but given the size, suggest interpreting it directionally and should perhaps be considered more qualitative in nature than quantitative, particularly when comparing the results one wave over the other. Data collection by phone for multinationals occurred between February 26 and March 21, 2024, and the data was not weighted. The telephone interviews were conducted from Leger's centralized call-centre using state of the art Computer Aided Telephone Interviewing (CATI) system.

Finally, an additional note on the results of the survey among regulators and policymakers to help inform how they are interpreted. As with the previous wave of study, the sample was randomly drawn from among a list of potential respondents provided by ISED. The sample list provided this time was somewhat larger (N=750) than the list provided for the previous survey (N=658). The profile of the sample list changed slightly from one wave to the next. In 2019, the sample list was comprised of 9% federal; 45% provincial/territorial; and, 46% municipal individuals. For this study, the sample profile was comprised of 13% federal; 54% provincial/territorial; 30% municipal individuals; and 3% Parliamentarians. While the profile of the samples achieved in each survey ended up being nearly identical, the change in universe definition may still have an impact on comparability of results.

At least as importantly, the sizes of each of the samples of regulators and policymakers are both fairly small. The previous wave had a random sample of n=50, which would have a margin of error of +/-13.3% at the 95% confidence level, when adjusted for the size of the universe (N=658). The current sample of n=21 has an even higher margin of error of +/-21.1% at the same confidence level adjusted for the finite universe size (N=750). Taken together, it means that the result of either do provide some directional evidence but should perhaps be considered more qualitative in nature than quantitative, particularly when comparing the results of one wave with the results of the other.

Key findings

Overall awareness and general perceptions of the Bureau

- Overall, awareness of and familiarity with the Bureau continues to be low among most consumer and business audiences; regulators and policymakers tend to be more familiar.
 - The qualitative research illustrated that consumers, SMBs and multinationals more readily named the Better Business Bureau, Canadian Anti-Fraud Centre, Canada Revenue Agency, RCMP, and provincial government departments or agencies (including local law enforcement) as the entity responsible for protecting consumers and businesses from anti-competitive behaviours, enforcing the relevant Acts, or advocating on related topics. Regulators and policymakers, on the other hand, more readily correctly identified the Bureau as the entity.
 - In terms of overall familiarity with the organization, the quantitative research demonstrates that there are varying degrees of familiarity across the four audiences with 14% familiarity among consumers, 18% among SMBs, 38% (up 10%) among multinationals and 53% (up 25%) among regulators and policymakers.

- Indeed, in the qualitative research, regulators and policymakers were able to describe some of the Bureau's work, unaided, such as: ensuring fair competition in the marketplace, investigating fraudulent behaviour or deceptive practices, the annual Fraud Prevention Month campaign, and *Deceptive Marketing Practices Digest*.
- Understanding of a series of terms related to the Bureau's work continues to be mixed for all audiences, though the survey data suggests understanding of most terms has increased with time for SMBs, and even more so for multinationals and regulators and policymakers.
 - In qualitative testing, consistent with last wave, terms such as anti-competitive practices, competition, scams, false or misleading representations, abuse of dominance, collusion, price-fixing, and bid-rigging tended to generate common interpretations that were generally accurate.
 - There was a little more confusion around terms such as cartels and mass-marketing fraud. Cartels, for example, was often conflated with organized crime activity.
- This wave, businesses, regulators and policymakers were asked to rate the level of importance of the Bureau's work. Depending on the question they were asked, three-quarters or more of respondents deem the Bureau's work important.
 - For example, when businesses were asked how important it is that Canada has laws to protect consumers and businesses against activities that could significantly hinder innovation and competition, reduce choice of products or service, or raise prices, 64% of SMBs and 76% of multinationals indicate it is important.
 - When regulators and policymakers were asked how important it is that Canada has a federal organization or agency that enforces competition and labelling laws, advocates for competition in the Canadian economy, and supports government agencies in promoting a fair and innovative economy, 86% feel it is important.
 - Indeed, the qualitative research demonstrated that despite the varying, and low, levels of awareness and knowledge of the Bureau and its work, all audiences deemed their role as important and valuable.
- Familiarity with the Acts the Bureau enforces has increased over time for most audiences though it continues to vary significantly across the four audiences. For example, 20% (down 3%) of consumers, 37% (up 7%) of SMBs, 62% (up 15%) of multinationals and 76% (up 13%) of regulators and policymakers are familiar with the *Competition Act*.
 - Over time, familiarity with the Acts (except the *Precious Metals Marking Act*) decreased for consumers since last wave, whereas, it increased for most Acts for SMBs, multinationals and regulators and policymakers.
 - The *Competition Act*, both quantitatively and qualitatively, is the Act that most influences the work of most businesses and regulators and policymakers.
 - Across all four audiences, and consistent with last wave, familiarity with the *Textile Labelling Act* and the *Precious Metals Marking Act* is lowest of the four Acts.

Awareness and perceptions of the Bureau's activities and performance

- The bread price-fixing investigation and the attempt to seek a full block of Rogers' proposed acquisition of Shaw are the most frequently recalled Bureau cases among almost all audiences surveyed. Interestingly, recall levels are very similar for consumer and business audiences. Regulators and policymakers have much higher levels of recall.

- The same number of consumers and SMBs (51% and 53%, respectively) recall the bread-price fixing investigation. A similar number of consumers (45%) and SMBs (45%) recall the attempt to seek a full block of Rogers' proposed acquisition of Shaw.
- Among multinationals, 45% recall the bread price-fixing investigation and one-third (33%) recall the attempt to seek a full block of Rogers' proposed acquisition of Shaw.
- Nearly nine-in-ten (86%) of regulators and policymakers recall the bread price-fixing investigation and 90% recall the attempt to seek a full-block of Rogers' proposed acquisition of Shaw.
- Among the four audiences surveyed, the Bureau's activities and publications that are of the greatest interest are the *Little Black Book of Scams* (32% of consumers, 36% of SMBs, 36% of multinationals, and 48% of regulators and policymakers are interested) and the Consumer/Business alerts (39% of consumers are interested, along with 31% of SMBs and 31% of multinationals). The other activity that is of interest to some is the Fraud Prevention Month campaign.
 - Shown examples of three consumer and/or business alerts published by the Bureau in the qualitative sessions, the vast majority appreciated the value and relevance of the information. They found the Alerts credible and indicated that they would like to receive such information.
- Once exposed to examples of the work of the Bureau (that is, Bureau cases, activities and publications), nearly two-thirds of consumers say they have a favourable impression of the Bureau, consistent with the findings of the previous wave.
- All audiences surveyed continue to agree that the work of the Bureau is important to the Canadian economy and trust the information it provides.
 - For example, 74% of consumers, 68% of SMBs, 79% of multinationals, and 86% of regulators and policymakers agree that the Bureau's work is beneficial to the Canadian economy. These numbers are fairly consistent over time for each audience.
 - Over two-thirds of each audience agree that they would trust information provided by the Bureau; 74% of consumers, 71% of SMBs, 74% of multinationals, and 81% (up 7%) of regulators and policymakers.

Impact of the Bureau's work

- Among the few consumers and SMBs surveyed who claim to have been influenced by one of the Bureau's activities, the most common response is that they are now armed with more information to protect against scams and other anti-competitive behaviour. In addition to that, multinationals are also likely to say that their company changed their business conduct to be more compliant and/or implemented a Compliance program. Regulators and policymakers note that the primary effect the Bureau's work has on them is that they consider it in their daily work drafting policy and regulations.
- As noted in the previous wave, there tends to be more respondents among the consumers, SMBs, and multinationals surveyed who provide either a neutral rating of the Bureau's performance on a variety of metrics, or who do not offer a response, than provide an opinion one way or another. This also speaks to the low levels of awareness of and familiarity with the organization, noted earlier.

- However, among those who do provide a response to the various metrics, more believe the Bureau is doing well than believe it is doing poorly. For example, where 41% of consumers provide a neutral rating or do not offer a response, 39% believe the Bureau is doing well at educating consumers on how to protect themselves against harmful activities, compared to 19% who believe the Bureau is doing poorly. Similarly, with respect to SMBs, where 48% provide a neutral rating or do not offer a response, 36% feel the Bureau is doing well at enforcing the laws against anti-competitive behaviour, compared to 16% who feel it is doing poorly.

Direct contact with the Bureau

- Contact with the Bureau continues to be low among consumers and SMBs. Consistent with the previous wave, just 6% of consumers and 12% of SMBs report having done so. Fewer across both segments have had in-person contact with the Bureau with 4% and 9% respectively.
 - Consumers who contacted the Bureau did so primarily to report a scam (39%, up 8%); and two-thirds (67%, up 18%) are satisfied with their experience.
 - SMBs, in contrast, are most likely to have contacted the Bureau to get information on compliance with labelling laws (34%) and the *Competition Act* (31%, up 19%). Half (49%) are satisfied with their interaction.
- Over one-quarter (28%) of multinationals, up 12% from the previous wave, say they have contacted the Bureau. The most common reasons for contacting the Bureau was for information on *Competition Act* compliance (38%), labelling compliance (31%), and mergers and acquisitions (31%). Three-quarters (76%) are satisfied with their interaction.
- Nearly half (48%, up 20%) of regulators and policymakers surveyed say they have contacted the Bureau. The most common reasons for contacting the Bureau are for advice on regulations or policies (40%, up 19%). One-in-seven say they found the information or service provided by the Bureau useful or effective.
 - Indeed, in the qualitative interviews with regulators and policymakers, the Bureau was praised for being extremely knowledgeable, professional, and timely.

The Bureau's future work

- Consumers and SMBs are most likely to pick the same five industries as one of the most important areas of focus for the Bureau's future work.
 - Consumers surveyed are most likely to pick the retail trade industry (29%) as the most important area of focus followed by banking and finance (28%), telecommunications (27%), health care and pharmaceuticals (24%) and accommodations and food services (20%).
 - SMBs pick banking and finance (25%) and healthcare and pharmaceuticals (25%) as the most important areas of focus followed by telecommunications (24%), retail trade (21%) and accommodations and food services (18%).
- While multinationals select most of the same industries among the most important areas of focus, their main priority is the construction sector (28%). Banking and finance, telecommunications, and healthcare and pharmaceuticals follow with 22% each. The

accommodations and food services industry follows at 19%. Interestingly, only 9% of multinationals pick the retail trade industry as an important area of focus for the Bureau's future work.

Proposed changes to the *Competition Act*

This year, businesses, regulators and policymakers were asked about their awareness of and anticipated impact of the changes on the range of choices available to consumers and the affordability of items such as groceries.

- Recall levels across the three audiences varied, with SMBs having the lowest level of recall (21% saying clear or vague recall). More than double multinationals (49%) and regulators and policymakers (48%) clearly or vaguely recall the proposed changes.
 - Worth noting, recall among SMBs and multinationals is softer than recall among regulators and policymakers. For example, of the 21% recall among consumers, 2% have clear recall while 19% have vague recall. Similarly, among multinationals, 16% have clear recall and 33% have vague recall. In contrast, among regulators and policymakers, one-quarter (24%) have clear recall and vague recall.
- In terms of anticipated impact of these changes, opinions are more consistent. Nearly six-in-ten (58%) of SMBs believe the changes will have a positive impact on the range of choices available to consumers, compared to 53% of multinationals and 62% of regulators and policymakers. Slightly fewer SMBs (51%) and regulators and policymakers (43%), but more multinationals (55%), believe the changes will have a positive impact on the affordability of items such as groceries.

Summary of consumer gender-based analysis plus

- Notable differences by gender include:
 - Men are more likely than women to be familiar with (19% vs. 9%), have heard something about (44% vs. 25%), or have contacted (8% vs. 3%) the Bureau;
 - Men are more likely to say that the description of the Bureau provided adds to or matches their understanding (61%) compared to women (35%);
 - Men are more familiar with anti-competitive terminology, and to have heard of several Bureau activities and publications than women,
- Respondents 55 years or older are more likely than younger respondents to:
 - Have heard something about the Bureau (41%);
 - Agree that the description of the Bureau given matches their existing understanding (23%);
 - Recall any of the Bureau's cases, activities or publications;
 - Have a favourable impression of the Bureau (66%);
 - Believe all of the roles provided in the survey should be among the Bureau's highest priorities.

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I hereby certify as a representative of Earncliffe Strategy Group that the final deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada 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.

Signed:

Date: April 26, 2024

A handwritten signature in black ink, appearing to read "Stephanie Constable".

Stephanie Constable
Principal, Earncliffe