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## 2023 to 2024 Competition Bureau Stakeholder Awareness and Influence Survey

Prepared for Innovation, Science and Economic Development Canada

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Canada 

# 2023 to 2024 Competition Bureau Stakeholder Awareness and Influence Survey

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April 2024

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 27<sup>th</sup> and 28<sup>th</sup>, 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 28<sup>th</sup> and March 22<sup>nd</sup>, 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.

Research firm: Earnscliffe Strategy Group (Earnscliffe)  
Contract number: CW2334003  
Contract value: \$199,980.62  
Contract award date: October 13, 2023

I hereby certify as a representative of Earnscliffe 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, Earnscliffe

## Introduction

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.

Feedback from the research will be used to:

- Identify specific areas where the Bureau should focus its outreach activities and better target engagement through social media and/or other channels to maximize reach, impact and potential benefits for consumers and businesses;
- Identify more effective outreach practices and messages to increase consumer and business awareness;
- Inform the development of a communications strategy aimed at increasing awareness of the importance of compliance with the Competition Act; and,
- Inform market study strategies to increase consideration of competition and innovation issues by regulators and policymakers.

The specific objectives of the research included, but were not limited to:

- Continuing to track the level of awareness that key stakeholder groups have of the Bureau and its activities;
- Assess the understanding that key stakeholder groups have of the Bureau's various activities (e.g., enforcement, compliance, outreach and advocacy);
- Determine if, and how, key stakeholder groups have changed their behaviour, or made decisions, because of their awareness and understanding of the Bureau's activities and role; and,

- Identify specific areas and opportunities to strengthen stakeholder awareness and understanding of the Bureau and its activity, so stakeholders can make pro-competitive choices.

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 27<sup>th</sup> and 28<sup>th</sup>, 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 28<sup>th</sup> and March 22<sup>nd</sup>, 2024. The interviews were approximately 30 to 45 minutes in length.

Please refer to the recruitment screeners in Appendix D of this report for all relevant screening and qualifications criteria. Appendix B provides the discussion guides used for the focus groups and Appendix C provides the interview guides used for the in-depth interviews. Appendix A provides greater detail on how the groups and interviews were recruited.

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:

|  |       |
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The length of interview for each audience was as follows:

- Consumers: 13 minutes
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- Policymakers & regulators: 17 minutes

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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 these results 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.

Appendix E summarizes the methodology used to undertake the quantitative research and Appendix F includes all the survey instruments used.

## Detailed findings

This report presents the combined results of both the qualitative and quantitative phases of research across three main sections, one for each target audience: consumers; businesses including decision-makers in SMBs and global multinationals; and, regulators and policymakers. Within each audience section, the results are presented across five main parts: overall awareness and general perceptions of the Bureau and the four Acts it enforces; awareness and perceptions of the Bureau's activities and performance; impact of the Bureau's work; contact with the Bureau, including preferred methods of communication; and, views regarding where the Bureau should focus future efforts. There is an additional sixth part, for businesses and regulators and policymakers, that explores views related to proposed changes to the *Competition Act*.

The thrust of the narrative in each section is informed by the quantitative results with nuanced findings informed by the qualitative results (indented sections within the body of the report). Where applicable (and question wording remained the same), quantitative tracking results are presented. Only differences that are notable have been discussed. "NA" denotes questions that were not asked in either wave of research.

In addition to the results shown in table format, further analyses were conducted to see what, if any, differences exist by demographic or firmographic characteristics. Unless otherwise noted, differences highlighted are statistically significant at the 95% confidence level. The statistical test used to determine the significance of the results was the Z-test. It is worth noting that percentages may not add up to 100% due to rounding. Also due to rounding, in some cases, the sum of the combined results described in the text may differ slightly from the one illustrated in a chart.

Other relevant variable or demographic characteristics used to analyze the data can be found in the quantitative data tables, presented under a separate cover. The capital letter subscript in the tables indicates that the result for a particular cell is statistically significantly greater than a result found in the same row, in the column with the same capital letter noted in the original cell.

With respect to the qualitative findings, except where specifically identified, the findings represent the combined results within the various target groups. Quotations used throughout the report were selected in order to bring the analysis to life and provide typical verbatim commentary from participants across the various groups. A glossary of terms can also be found in the Qualitative methodology report in Appendix A that explains the generalizations and interpretations of qualitative terms used throughout the report.

For the purposes of interpreting the qualitative results, it is important to note that qualitative research is a valid form of scientific, social, policy, and public opinion research. However, 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, as was done in this research. 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.

## A. Consumers

The consumer section is divided into the following sub-sections:

1. the first explains overall awareness and general perceptions of the Bureau and the four Acts it enforces;
2. the second deals with awareness and perceptions of the Bureau's activities and performance;
3. the third focuses on the impact of the Bureau's work;
4. the fourth summarizes contact with the Bureau, including preferred methods of communication;
5. the fifth outlines views regarding where the Bureau should focus future efforts;
6. and the sixth explores views related to proposed changes to the Competition Act.

### Overall awareness and general perceptions of the Bureau

Very few consumers (15%), consistent with the previous wave, can identify the Competition Bureau as the organization responsible for enforcing federal competition and labelling laws. Four in ten (42%) cannot name an organization responsible for enforcing federal competition laws and labelling laws, or don't know (16%), while 27% name another organization.

In terms of familiarity, as with the previous wave, only 14% are familiar with the Bureau.

- Respondents from Ontario (17%) and Atlantic Canada (18%) are more likely than respondents from Quebec (9%) and British Columbia (10%) to claim they are familiar with the Bureau.
- Unlike with the previous wave, this wave, those not born in Canada (23%) are more familiar with the Bureau than those who were (12%).



- Men continue to be more likely to say they are familiar than women (19% vs. 9%).

Very few (7%) clearly recall hearing anything about the Bureau, while 27% vaguely recall hearing something.

- Men continue to be more likely than women to report having heard something about the Bureau (44% clearly or vaguely recall vs. 25%).
- Those 55 and older are more likely to have heard something (41%, up 6% since the previous wave) compared to those 18 to 34 (31%) and 35 to 54 (29%).
- Though Quebecers are the least likely to report that they are familiar with the Bureau, they are significantly more likely than residents of other regions to say they recall hearing about the agency (39%); a trend noted last wave.

Under one-in-five (18%), when presented with an explanation of the Bureau, say it matches their existing understanding of it, while 30% say it adds to their understanding. Almost half (44%) did not know about the Bureau prior to the survey.

- Men are more likely than women to say the description of the Bureau adds to their understanding of it (39% vs. 21%) or that the description matches their existing understanding (22% vs. 14%).
- Respondents 55 and older are more likely to agree that the description matches their existing understanding (23% vs. 12% for respondents 18 to 34, and 16% for respondents 35 to 54).

### Qualitative insights: Awareness of the Bureau

As was the case in 2019-20, most were not all that knowledgeable of and seemed to have only basic knowledge about the Bureau.

Asked to write the name of the organization or agency that you would contact if you had issues, questions or concerns related to deceptive marketing practices and other anti-competitive conduct, most tended to refer to the Better Business Bureau, Canadian Anti-Fraud Centre, Canada Revenue Agency, the RCMP, and provincial government departments or agencies (including local law enforcement).

The Bureau’s name tended to elicit some accurate assumptions about its role. Assumptions were that the Bureau’s role must relate to ensuring there is ample and fair competition in the Canadian marketplace such as (specific examples cited): mergers, acquisitions, monopolies, labelling, price-fixing, and consumer protection. There was also an assumption that the Bureau’s role was predominantly regulatory, advocacy and outreach; very few were aware of the Bureau’s enforcement role though a few were aware of their investigative role.

“I remember when they discussed acquisitions, which reduced competition in the market. It’s to protect the consumers from being taken advantage.” – Consumers (French)

Exhibit A1: Q4: Can you name the organization responsible for enforcing federal competition laws and labelling laws (except as it relates to food products)?

Base: All respondents

| Column %  | 2023-24 | 2019-20 |
|---|---------|---------|
| Competition Bureau / Competition Bureau of Canada | 15%     | 12%     |
| Food and Drug Administration (FDA)                | 6%      | 3%      |

|  |      |      |
|--|------|------|
| Consumer Affairs / Consumer Protection | 3%   | 3%   |
| Canadian Food Inspection Agency (CFIA) | 2%   | 2%   |
| Health Canada                          | 2%   | 1%   |
| Federal government / Government        | 2%   | 1%   |
| Police / RCMP                          | 1%   | 1%   |
| Other                                  | 11%  | 11%  |
| None / Nothing                         | 42%  | 47%  |
| Don't know / Prefer not to answer      | 16%  | 19%  |
| Sample size                            | 1034 | 1023 |

Exhibit A2: Q16: How familiar are you with the Competition Bureau? Please use a scale from 1 to 5 where 1 means “Not at all familiar” and 5 means “Very familiar.”

Base: All respondents

|                                   |         |         |
|-----------------------------------|---------|---------|
| Column %                          | 2023-24 | 2019-20 |
| 1-Not at all familiar             | 34%     | 39%     |
| 2                                 | 26%     | 26%     |
| 3                                 | 22%     | 21%     |
| 4                                 | 10%     | 9%      |
| 5-Very familiar                   | 4%      | 3%      |
| Don't know / Prefer not to answer | 4%      | 2%      |
| Sample size                       | 1034    | 1023    |

Exhibit A3: Q17: (2023-24) The Competition Bureau is an independent law enforcement agency that protects and promotes competition for the benefit of Canadian consumers and businesses. It investigates anti-competitive activities, protects consumers and promotes competitive markets. Which statement best reflects your knowledge of the Competition Bureau before completing this survey? / (2019-20) The Competition Bureau is an independent federal law enforcement agency that ensures Canadian businesses and consumers prosper in a competitive and innovative marketplace. It investigates anti-competitive activities, protects consumers and promotes competitive markets. Which statement best reflects your knowledge of the Competition Bureau before completing this survey?

Base: All respondents

|  |         |         |
|--|---------|---------|
| Column %   | 2023-24 | 2019-20 |
| I did not know about the Competition Bureau before doing this survey | 44%     | 47%     |
| This adds to what I already knew of the Competition Bureau           | 30%     | 31%     |
| This was already my understanding of the Competition Bureau          | 18%     | 16%     |
| Don't know / Prefer not to answer                                    | 8%      | 6%      |
| Sample size  | 1034    | 1023    |

Exhibit A4: Q18: Over the past year, how clearly do you recall seeing or hearing anything about the Competition Bureau?

Base: All respondents

|  |         |         |
|--|---------|---------|
| Column %                                   | 2023-24 | 2019-20 |
| Do not recall seeing or hearing anything   | 59%     | 65%     |
| Vaguely recall seeing or hearing something | 27%     | 25%     |
| Clearly recall seeing or hearing something | 7%      | 5%      |
| Don't know / Prefer not to answer          | 6%      | 5%      |
| Sample size                                | 1034    | 1023    |

Consumers do not appear to be very familiar with the various terms related to the Bureau’s work. Under half (44%) are aware of misleading advertising; 30% are aware of price-fixing, bid-rigging, or collusion; and 29% are aware of abuse of dominance. Approximately, one-quarter are aware of mergers and acquisitions (26%) and mass marketing fraud (23%). These are all consistent with the survey results in 2019-20. Nearly one-in-five (18%) are aware of new terms added this year, wage fixing and no-poaching agreements.

- Men continue to be more likely than women to claim they are aware of price-fixing, bid-rigging, or collusion (37% vs. 24%), abuse of dominance (34% vs. 23%), mergers and acquisitions (33% vs. 19%), mass-marketing fraud (27% vs. 20%), consumer packaging and textile labelling, and marking of precious metals (24% vs. 16%).
- Respondents 18 to 34, as compared to respondents 55 or older, are more likely to say they are aware of abuse of dominance (monopolization) (34% vs. 24%), consumer packaging and textile labelling, and marking of precious metals (24% vs. 16%), and wage-fixing and no-poaching agreements (23% vs. 14%).
- Residents of Ontario, Alberta and BC remain more familiar with the anti-competitive terminology than those in other regions.

**Qualitative insights: Understanding of Bureau terminology**

Testing such terms demonstrated that consumers seemed to have a basic understanding of most terms and recognized the relationship of various terms.

As in the previous 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.

Terms such as cartels and mass-marketing fraud tended to elicit more diverse interpretations or uncertainty. Cartels, for example, was often conflated with organized crime activity.

Exhibit A5: Q5-11: Please indicate how aware you are of these activities. Please use a scale from 1 to 5 where 1 means “Not at all aware” and 5 means “Very aware”? % Aware displayed. Base: All respondents

| Column %   | 2023-24 | 2019-20 |
|--|---------|---------|
| Misleading advertising and deceptive marketing practices                 | 44%     | 44%     |
| Price-fixing, bid-rigging, collusion                                     | 30%     | 32%     |
| Abuse of dominance (monopolization)                                      | 29%     | 30%     |
| Mergers and acquisitions   | 26%     | 25%     |
| Mass-marketing fraud   | 23%     | 26%     |
| Consumer packaging and textile labelling, and marking of precious metals | 20%     | 19%     |
| Wage-fixing and no-poaching agreements                                   | 18%     | NA      |
| Sample size  | 1034    | 1023    |

Familiarity with the Acts the Bureau enforces continues to be fairly low and seems to have decreased for all Acts but the *Precious Metals Marking Act*. Around one-in-five consumers are familiar with the *Consumer Packaging and Labelling Act* (22%) and the *Competition Act* (20%). Fewer are aware of the *Textile Labelling Act* (17%) and the *Precious Metals Marking Act* (11%).

- Men are more likely than women to say that they are familiar with the *Competition Act* (23% vs. 16%).

- Residents of Ontario are more likely to say they are familiar with the *Competition Act* and the *Consumer Packaging and Labelling Act* than all other regions.
- English-speakers are more likely than French-speakers to say they are familiar with all four Acts.

**Qualitative insights: Knowledge of the Acts**

Awareness and knowledge of the *Competition Act* and the three related Acts continued to be low across all audiences. When prompted with the names of each of the four Acts enforced by the Bureau, most participants indicated having vague recall of the *Competition Act* but generally being unaware of the four Acts themselves.

Despite the limited awareness and knowledge of these Acts, however, most tended to believe that they did relate to their lives, even if it tended not to be something of which they were cognizant on a day-to-day basis. Prompting with examples such as truth in advertising, investigating cartels, preventing abuse of market power or reviewing mergers encouraged participants recognize that there were additional aspects of the Bureau’s mandate that was important to them.

“It’s a great checks and balances. It is going to hold businesses accountable. It’s important that we have these things in place.” – Consumer

Participants across all groups tended to agree on the relevance of the two Acts related to labelling, the *Consumer Packaging and Labelling Act* and the *Textile Labelling Act*, though instinctually most thought of food product labelling and rarely of textiles. When asked not to focus on the labelling of food products, participants tended to think labelling information in the context of country of origin or manufacture and the use of both official languages, was of relevance to them.

“I agree, as it helps me identify whether I want to buy the [textile] product.” – Consumers (French)

Views of the *Precious Metals Marking Act* was generally low, consistent with last wave. Several consumers did note the relevance and importance of the Act as it relates to ensuring the content and/or purity of metal products as a measure to validate such metals and their value as an investment.

Exhibit A6: Q12-15: Below is a list of Canadian laws. Please indicate how familiar you are with each of them. Please use a scale from 1 to 5 where 1 means "Not at all familiar" and 5 means "Very familiar." % Familiar displayed.

Base: All respondents

| Column %   | 2023-24 | 2019-20 |
|--|---------|---------|
| A federal law called the <i>Competition Act</i> that governs most business conduct in Canada, with the purpose of maintaining and encouraging competition in the Canadian economy and ensuring consumers have access to competitive prices and product choices | 20%     | 23%     |
| A federal law called the <i>Consumer Packaging and Labelling Act</i> that requires that prepackaged consumer products (except food products) have accurate and meaningful labelling information  | 22%     | 27%     |

|   |      |      |
|---|------|------|
| A federal law called the <i>Textile Labelling Act</i> that requires that textile articles, such as clothing, have accurate and meaningful labelling information | 17%  | 18%  |
| A federal law called the <i>Precious Metals Marking Act</i> that covers the requirements for the marking of precious metals such as gold and silver             | 11%  | 9%   |
| Sample size   | 1034 | 1023 |

### Awareness and perceptions of the Bureau’s activities and performance

Including those who indicated they know of “all of them”, few consumers recall any of the Bureau’s cases, with the exception of the bread price-fixing investigation (51%) and Rogers’ proposed acquisition of Shaw (45%). Less than one-in-ten recall any of the other cases, with the exception of the 13% who recall the Bureau’s actions to stop unsubstantiated weight loss claims.

- Respondents 55 or older are the likeliest of all age groups to recall any of the Bureau’s cases. For example, 67% recall the bread price-fixing investigation, compared to 45% among those 35 to 54 and 32% among those 18 to 34.
- Men are more likely than women to say that they recall hearing about several activities, including the attempt to seek a full-block of Rogers’ proposed acquisition of Shaw (53% vs. 38%).

#### Qualitative insights: Awareness and interest in the Bureau’s cases

Prompted with a list of several of the Bureau’s activities (please refer to the Appendix for the full lists shared with the various audiences), the majority of participants seemed to come away feeling that the Bureau had a much broader mandate, was much more active, and on cases of greater importance than they were aware. In most instances, as noted in our last wave of research, exposure to these activities tends to improve impressions of the Bureau.

The vast majority of participants had heard of at least one or more of the enforcement examples, though awareness of the Bureau’s role in these examples was virtually nil. Awareness of the bread price-fixing investigation and Rogers’ acquisition of Shaw was high. Many had also heard something related to weight loss claims though they were not always sure what they had heard or whether it was related to an investigation of false claims. Very few, if any, had heard of Terry Croteau’s deceptive telemarketing case, Secure Energy Services’ acquisition of Tervita Corporation or the merger between Sika AG and MBCC Group.

“I’ve only heard of the bread price-fixing and the Shaw acquisition.” – Consumer (French)

Exhibit A7: Q19: Below is a list of cases pursued by the Competition Bureau. For each of the following, please indicate if you recall hearing about it. Please select all that apply.

Base: All respondents

| Column %   | 2023-24 |
|--|---------|
| The bread price-fixing investigation, where there is an ongoing investigation into alleged price-fixing between producers to raise wholesale bread prices, as well as alleged price-fixing between grocery stores to raise retail prices. Canada Bread Company Limited, a bread producer and distributor, was fined \$50 million after pleading guilty for its role in a criminal price-fixing arrangement | 49%     |

|   |      |
|---|------|
| The Competition Bureau's attempt to seek a full-block of Rogers' proposed acquisition of Shaw   | 44%  |
| The Competition Bureau's actions to stop unsubstantiated weight loss claims   | 11%  |
| The Competition Bureau's Gatineau bid-rigging case, where an engineering executive was accused in a bid-rigging scheme that bilked the City of Gatineau out of an estimated \$1.8 million   | 6%   |
| The Dufresne Group Inc. (TDG) and its affiliates agreed to pay \$3.25M to settle the Competition Bureau's concerns over marketing claims regarding advertising of big discounts which were in reality discounts being applied to prices that were listed as much higher than the normal price, as well as giving consumers false or misleading impression that deals on certain items would no longer be available after a certain time | 5%   |
| The Competition Bureau investigation that led to multiple criminal charges against Mr. Terry Croteau of Ontario alleging the use of deceptive telemarketing and false or misleading statements to get Canadian businesses to sign up for listings in online directories   | 5%   |
| The Competition Bureau's challenge of Secure Energy Services' acquisition of Tervita Corporation  | 4%   |
| The Competition Bureau's review of the merger between admixture system firms Sika AG and MBCC Group   | 3%   |
| All of them   | 2%   |
| None of them  | 24%  |
| Don't know / Prefer not to answer   | 9%   |
| Sample size   | 1034 |

Consumer recall of the Bureau's activities and publications was similarly low. Including consumer who recalled "all of them", the Bureau's submissions to the CRTC on mobile wireless services (24%), the Bureau's market studies (22%), and consumer alerts (17%) are among the activities respondents are more likely to recall.

As with recall of the Bureau's cases:

- Respondents 55 or older are the likeliest of all age groups to recall any of the activities and publications. For example, 32% recall the CRTC submissions, compared to 19% among those 35 to 54 and 17% among those 18 to 34.
- Men are also more likely than women to say that they recall hearing about several activities and publications, including the CRTC submissions (30% vs. 19%) and consumer alerts (22% vs. 12%).

#### **Qualitative insights: Awareness and interest in the Bureau's cases**

Unaided recall of the outreach examples was quite low among consumers. Of the various activities and publications, consumers were generally more aware of the Fraud Prevention Month campaign and consumer alerts (that may or may not be linked to the Bureau). Perhaps not surprising given the catchy title (as noted by many participants), there continued to be a lot of intrigue and interest in the *Little Black Book of Scams*.

"I've never heard of [the Fraud Prevention Month campaign] before. The campaign of the month should be year-round." – Consumer (French)

Unaided recall of the various advocacy examples was similarly low, varying from example to example. Few, if any, recalled papers published by the Bureau, though several claimed to recall the CRTC submissions.

Exhibit A8: Q20: Below is a list of Competition Bureau activities and publications. For each of the following, please indicate if you recall hearing about it. Please select all that apply.

Base: All respondents

| Column %  | 2023-24 |
|---|---------|
| The Competition Bureau’s submissions to the Canadian Radio-Television and Telecommunications (CRTC) on mobile wireless services   | 22%     |
| The Competition Bureau’s market studies, such as the retail grocery market study  | 20%     |
| The Competition Bureau’s Consumer alerts, such as alert warnings about “greenwashing” and cryptocurrency investment fraud   | 15%     |
| The annual Fraud Prevention Month campaign  | 9%      |
| The dedicated telephone tip line and online form to accept anonymous tips from Canadians who suspect fraud, collusion or corruption in federal government contracts and real estate property agreements | 8%      |
| The Competition Bureau’s online complaint form where you can notify the Competition Bureau if you believe that a company or individuals have participated in anti-competitive activity                  | 7%      |
| The Competition Bureau’s publication to help Canadians identify and protect themselves against scams called the <i>Little Black Book of Scams</i>   | 6%      |
| The Competition Bureau’s efforts to communicate in plain language   | 6%      |
| The Competition Bureau’s report on competitive intensity in Canada from 2000-2020   | 3%      |
| All of them   | 2%      |
| None of them  | 44%     |
| Don’t know / Prefer not to answer   | 11%     |
| Sample size   | 1034    |

When it comes to which Bureau activities and publications consumers find interesting, including respondents who expressed interest in “all of them”, consumer alerts (39%), the *Little Black Book of Scams* (32%), the annual Fraud Prevention Month campaign (29%), and the CRTC submissions (28%) are the most popular. Incidentally, consumer interest in most Bureau activities and publications seems to have waned slightly across the two waves of research with the exception of the Deceptive Marketing Practices Digest and the Bureau’s competition promotion work.

- Respondents aged 55 or older are more interested than those 35 to 54 and 18 to 34 in consumer alerts (51% vs. 36% vs. 25%), the *Little Black Book of Scams* (40% vs. 29% vs. 25%), the annual Fraud Prevention Month campaign (35% vs. 26% vs. 23%) and the CRTC submissions (34% vs. 26% vs. 20%).
- Albertans seem more interested in several activities and publications than respondents from other regions: the *Little Black Book of Scams* (38%), updates on the Bureau’s major enforcement cases (27%) and the Bureau’s competition promotion work (23%) to name a few.

Exhibit A9: Q21: Below is a list of Competition Bureau activities and publications. Please indicate the ones, if any, that are of interest to you. Please select all that apply. % Interested displayed.

Base: All respondents

| Column % | 2023-24 | 2019-20 |
|----------|---------|---------|
|----------|---------|---------|

|  |      |      |
|--|------|------|
| The Competition Bureau’s Consumer alerts - alerts with information for consumers about deceptive marketing practices, misleading advertising and scams                               | 31%  | 39%  |
| The <i>Little Black Book of Scams</i> – a publication with tips to help consumers and businesses recognize and report scams in Canada  | 25%  | 32%  |
| The annual Fraud Prevention Month campaign to help Canadians recognize, reject and report fraud  | 21%  | 23%  |
| The Competition Bureau’s submissions to the Canadian Radio-Television and Telecommunications (CRTC) on telecommunications services   | 20%  | NA   |
| The Competition Bureau’s <i>Deceptive Marketing Practices Digest</i> – a publication that offers advice and presents the Bureau’s perspective on advertising and marketing practices | 14%  | 14%  |
| Updates on the Competition Bureau’s major enforcement cases  | 13%  | 18%  |
| The Competition Bureau’s competition promotion work, such as its market studies, submissions to government consultations, summits, and open letters to regulators and policymakers   | 9%   | 7%   |
| All of them  | 8%   | 13%  |
| None of them   | 30%  | 20%  |
| Don’t know / Prefer not to answer  | 11%  | 8%   |
| Sample size  | 1034 | 1023 |

After being presented with lists of the Bureau’s cases, activities and publications, consumers were asked their impression of the Bureau. The results across the two waves were very consistent. Half of consumers have a positive view of the Bureau (62% very or somewhat favourable). Few (8%) have an unfavourable impression.

- Of note, respondents 55 or older as compared to respondents 35 to 54 and 18 to 34 have a favourable impression of the Bureau (66% vs. 58% vs. 62%).

**Qualitative insights: Awareness and interest in the Bureau’s cases, activities and publications**

As mentioned earlier, participants seemed to come away feeling that the Bureau had a much broader mandate, was much more active, and on cases of greater importance than they were aware. In most instances, as noted in our last wave of research, exposure to these activities tends to improve impressions of the Bureau. Participants spoke of the fact that knowing the Bureau was responsible for all of these activities was a source of comfort. For example, and as we will see later in this report, in the case of the Bureau’s CRTC submissions, participants were relieved that the Bureau was pursuing a case on an issue and facing a sector for whom they are preoccupied (that is, perceived uniquely excessive costs of telecommunications services in Canada).

“It’s interesting to have reports, market research, interviews, and messages that reach consumers.” – Consumers (French)

Exhibit A10: Q30: After reviewing this list of the Competition Bureau’s activities and publications, how would you describe your impression of the Competition Bureau?

Base: All respondents

|                     |         |         |
|---------------------|---------|---------|
| Column %            | 2023-24 | 2019-20 |
| Very favourable     | 27%     | 27%     |
| Somewhat favourable | 35%     | 37%     |



|                                   |      |      |
|-----------------------------------|------|------|
| Neither                           | 17%  | 15%  |
| Somewhat unfavourable             | 5%   | 5%   |
| Very unfavourable                 | 3%   | 5%   |
| Don't know / Prefer not to answer | 13%  | 12%  |
| Sample size                       | 1034 | 1023 |

As was noted in the previous wave, when rating the Bureau's performance on a number of roles, the plurality offer either a neutral impression or do not provide a response at all, which is in line with consumers' lack of familiarity with the Bureau. Having said that, those who do not provide a response are more likely to agree the Bureau is doing well rather than doing poorly.

Over a third (39%) say it is doing well educating consumers on how to protect themselves against harmful activities such as fraud and scams, compared to 19% who say it is doing poorly. Another 34% say it is doing well providing consumer alerts on deceptive marketing practices as compared to 21% who say it is doing poorly.

Worth noting, with the exception of the Bureau's role enforcing laws against anti-competitive behaviour, which saw an 8% drop in those saying it is doing well (39% to 31% this year), those saying the Bureau is doing well in a number of roles has remained consistent over time.

In terms of notable demographic differences:

- Respondents 18 to 34, as compared to those 35 to 54 and 55 or older, are more likely to believe the Bureau is doing well across the various roles it plays. For example, respondents 18 to 34 are more likely to believe that the Bureau is doing well enforcing laws against anti-competitive behaviour (39%) than those 35 to 54 (28%) and 55 or older (28%). Similarly, those 18 to 34 compared to those 35 to 54 or 55 or older feel the Bureau is doing well educating Canadians how to recognize anti-competitive behaviour (37% vs. 28% vs. 28%) and publishing the outcomes of investigations (36% vs. 26% vs. 23%).
- Quebecers are more likely to agree the Bureau is doing well with each role included in the survey, with the exception of educating Canadians on how to report suspected anti-competitive activity.
- Those who are familiar with the Bureau are more likely to agree it is doing well with each role included in the survey than those who are not familiar. For example, over three-in-five (62%) say the Bureau does well educating consumers on how to protect themselves against harmful behaviour, compared to those who are not familiar (33%).

#### **Qualitative insights: Consumer alerts**

Provided with examples of consumer and/or business alerts published by the Bureau, participants consistently demonstrated appreciation for the value and relevance of the information. Reactions were consistently positive, and they were unanimously seen as topical and credible.

While most felt the look and feel of the consumer and/or business alerts could be a little more interesting and attention grabbing, there was interest in receiving such alerts. Based on their cursory review of each alert, the majority of participants came away feeling they were sufficiently detailed, well organized including the brief description of the case at the top, helpful in the provision of tips to be better prepared or equipped to recognize a scam, and pointed to additional information should it be of interest.

Moreover, they were widely acknowledged as the kind of thing that may govern reactions or behaviour. And while some claimed they would be interested in signing up to receive them via email, others preferred they be accessible online.

“We have the responsibility to find out, but we need to find a way for the Competition Bureau to let us know they are for consumers as well.” – Consumers (French)

Exhibit A11: Q31-36: In your opinion, how is the Competition Bureau doing at each of the following? % Very well/Well displayed.

Base: All respondents

| Column %  | 2023-24 | 2019-20 |
|---|---------|---------|
| Educating consumers on how to protect themselves against harmful activities such as fraud and scams   | 39%     | 39%     |
| Providing Canadian consumers with Consumer alerts containing useful information on deceptive marketing practices, misleading advertising and scams    | 34%     | 35%     |
| Enforcing laws against anti-competitive behaviour, such as price-fixing and misleading advertising and deceptive marketing practices                  | 31%     | 39%     |
| Educating Canadians on how to recognize anti-competitive behaviour, such as price-fixing and misleading advertising and deceptive marketing practices | 31%     | 31%     |
| Publishing the outcomes of the investigations the Competition Bureau has completed  | 27%     | 29%     |
| Educating Canadians on how to report suspected anti-competitive activity to the Competition Bureau  | 26%     | 27%     |
| Sample size   | 1034    | 1023    |

This wave, consumers were asked to indicate which of the Bureau’s roles should be among its highest priorities.

A little over half (55%) of respondents prioritize the Bureau’s enforcement role enforcing anti-competitive behaviour. Nearly half of respondents (47%) believe that educating Canadians on ways to protect themselves from fraud and scams should be a top priority of the Bureau. Fewer respondents believe that consumer alerts (43%), educating Canadians to recognize anti-competitive behaviour (38%), educating Canadians on how to report suspected anti-competitive activity (31%), and publishing the outcomes of investigations (30%) ought to be among its highest priorities.

- Respondents 55 or older, as compared to those 35 to 54 and 18 to 34, are more likely to believe all of the roles should be among the Bureau’s highest priorities. For example, respondents 55 or older believe enforcing laws against anti-competitive behaviour (62%) should be among the Bureau’s highest priorities as compared to those 35 to 54 (51%) and 18 to 34 (49%).
- Those residing in rural communities are more likely than those in suburban or urban communities to believe educating consumers on how to protect themselves against harmful activities (57% vs. 46% vs. 45%) should be among the Bureau’s highest priorities.

Exhibit A12: Q37: Of the same list of roles it performs, please indicate which should be the Competition Bureau's highest priority, in your opinion?

Base: All respondents

| Column %  | 2023-24 |
|---|---------|
| Enforcing laws against anti-competitive behaviour, such as price-fixing and misleading advertising and deceptive marketing practices                  | 55%     |
| Educating consumers on how to protect themselves against harmful activities such as fraud and scams   | 47%     |
| Providing Canadian consumers with Consumer alerts containing useful information on deceptive marketing practices, misleading advertising and scams    | 43%     |
| Educating Canadians on how to recognize anti-competitive behaviour, such as price-fixing and misleading advertising and deceptive marketing practices | 38%     |
| Educating Canadians on how to report suspected anti-competitive activity to the Competition Bureau  | 31%     |
| Publishing the outcomes of the investigations the Competition Bureau has completed  | 30%     |
| Sample size   | 1034    |

### Impact of the Bureau's work

More than one-third (37%) say that any of the Bureau's activities have had an impact on their behaviour as a consumer. Including those who indicated that "all of them" has had an impact, the activity that has impacted the greatest number of respondents are the consumer alerts (18%), followed by the annual Fraud Prevention Month Campaign (15%), the Bureau's CRTC submissions (15%) and the *Little Black Book of Scams* (11%).

- Those 55 or older are more likely to report being influenced by consumer alerts (24%) than those 35 to 54 (15%) and 18 to 34 (13%). They are also more likely to report being influenced by the Bureau's CRTC submissions (19%) than those 35 to 54 (14%) and 18 to 34 (10%).
- Albertans are more likely to say that they have been influenced by updates on the Bureau's major enforcement cases (14%) compared to residents Ontario (7%) and BC (4%).

Exhibit A13: Q22: Using the list below, please indicate the ones, if any, that have had an impact on your behaviour as a consumer. Please select all that apply.

Base: All respondents

| Column %  | 2023-24 | 2019-20 |
|---|---------|---------|
| The Competition Bureau's Consumer alerts - alerts with information for consumers about deceptive marketing practices, misleading advertising and scams  | 15%     | 21%     |
| The annual Fraud Prevention Month campaign to help Canadians recognize, reject and report fraud   | 12%     | 10%     |
| (2023-24) The Competition Bureau's submissions to the Canadian Radio-Television and Telecommunications (CRTC) on telecommunications services / (2019-20) The Competition Bureau's submissions to the Canadian Radio-Television and Telecommunications Commission (CRTC) on mobile wireless services | 12%     | 14%     |
| The <i>Little Black Book of Scams</i> – a publication with tips to help consumers and businesses recognize and report scams in Canada   | 8%      | 10%     |

|   |      |      |
|---|------|------|
| The Competition Bureau's <i>Deceptive Marketing Practices Digest</i> – a publication that offers advice and presents the Bureau's perspective on advertising and marketing practices  | 6%   | 7%   |
| (2023-24) The Competition Bureau's competition promotion work, such as its market studies, submissions to government consultations, summits, and open letters to regulators and policymakers / (2019-20) The Competition Bureau's competition promotion work, such as its market studies, white papers, The Competition Advocate, and open letters to regulators and policymakers | 6%   | 5%   |
| Updates on the Competition Bureau's major enforcement cases   | 5%   | 6%   |
| All of them   | 3%   | 6%   |
| None of them  | 45%  | 37%  |
| Don't know / Prefer not to answer   | 18%  | 21%  |
| Sample size   | 1034 | 1023 |

Among those impacted by any of the Bureau's activities or publications, respondents most often say that they equipped them with more information to protect themselves against harmful activities (51%), gave more knowledge of anti-competitive activity (18%), and led them to change their purchasing behaviour (15%). In terms of year over year comparisons, the impact on behaviour seems to have diminished slightly across every type of impact and across all activities and publications, with but a few exceptions.

- Among those impacted by the annual Fraud Prevention Month campaign, half (50%) continue to say they were equipped with more information to protect themselves against activities.
- Nearly one-third (32%) of those impacted by the Bureau's CRTC submissions continue to say they have more knowledge on anti-competitive activity as a result.
- Among those impacted by the Deceptive Marketing Practices Digest, 14% (up 4%) say they were motivated to visit the Bureau's website for more information.
- The impact of the Bureau's competition promotion work equipped one-quarter of consumers (27%, up 2%) with more knowledge on anti-competitive activity.

Due to the small sample sizes, there are few statistically significant differences in how consumers from different demographic groups have changed their behaviour as a result of Bureau activities or publications.

Exhibit A14: Q26: You indicated that each of the following have had an impact on your behaviour as a consumer. For each, please indicate what type of impact it had using the drop-down menu provided. The Competition Bureau's Consumer alerts – alerts with information for consumers about deceptive marketing practices, misleading advertising, and scams.

Base: Among those who indicated the publication had an impact on their behaviour

| Column %   | 2023-24 | 2019-20 |
|--|---------|---------|
| I have more information to protect myself against harmful activities such as fraud and scams | 51%     | 59%     |
| I did not do anything, but I have more knowledge on anti-competitive activity                | 18%     | 25%     |
| I changed my purchasing behaviour  | 15%     | 31%     |
| I visited the Competition Bureau's website for more information                              | 5%      | 8%      |
| I filed a complaint with the RCMP or local police  | 1%      | 2%      |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity       | 1%      | 1%      |

|   |     |     |
|---|-----|-----|
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 1%  | 1%  |
| I filed a complaint with the Better Business Bureau   | 1%  | 1%  |
| I contacted the Canadian Anti-Fraud Centre  | 1%  | 4%  |
| Don't know / Prefer not to answer   | 6%  | 7%  |
| Sample size   | 187 | 272 |

Exhibit A15: Q27: You indicated that each of the following have had an impact on your behaviour as a consumer. For each, please indicate what type of impact it had using the drop-down menu provided. The annual Fraud Prevention Month Campaign to help Canadians recognize, reject and report fraud.

Base: Among those who indicated the publication had an impact on their behaviour

| Column %  | 2023-24 | 2019-20 |
|---|---------|---------|
| I have more information to protect myself against harmful activities such as fraud and scams  | 50%     | 50%     |
| I did not do anything, but I have more knowledge on anti-competitive activity   | 17%     | 28%     |
| I changed my purchasing behaviour   | 11%     | 25%     |
| I visited the Competition Bureau's website for more information   | 9%      | 14%     |
| I contacted the Canadian Anti-Fraud Centre  | 3%      | 5%      |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 1%      | 2%      |
| I filed a complaint with the Better Business Bureau   | 1%      | 1%      |
| I filed a complaint with the RCMP or local police   | 0%      | 4%      |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 0%      | 1%      |
| Don't know / Prefer not to answer   | 7%      | 14%     |
| Sample size   | 152     | 162     |

Exhibit A16: Q28: You indicated that each of the following have had an impact on your behaviour as a consumer. For each, please indicate what type of impact it had using the drop-down menu provided. (2023-24) The Competition Bureau's submissions to the Canadian Radio-Television and Telecommunications Commission (CRTC) on telecommunications services. / (2019-20) The Competition Bureau's submissions to the Canadian Radio-Television and Telecommunications Commission (CRTC) on wireless mobile services.

Base: Among those who indicated the publication had an impact on their behaviour

| Column %   | 2023-24 | 2019-20 |
|--|---------|---------|
| I did not do anything, but I have more knowledge on anti-competitive activity                | 32%     | 32%     |
| I have more information to protect myself against harmful activities such as fraud and scams | 30%     | 39%     |
| I changed my purchasing behaviour  | 15%     | 28%     |
| I visited the Competition Bureau's website for more information                              | 6%      | 10%     |
| I filed a complaint with the Better Business Bureau  | 3%      | 1%      |
| I filed a complaint with the RCMP or local police  | 1%      | 1%      |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity       | 1%      | 1%      |

|   |     |     |
|---|-----|-----|
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 1%  | 2%  |
| I contacted the Canadian Anti-Fraud Centre  | 1%  | 2%  |
| Don't know / Prefer not to answer   | 11% | 12% |
| Sample size   | 152 | 207 |

Exhibit A17: Q24: You indicated that each of the following have had an impact on your behaviour as a consumer. For each, please indicate what type of impact it had using the drop-down menu provided. The *Little Black Book of Scams* – a publication with tips to help consumers and businesses recognize and report scams in Canada.

Base: Among those who indicated the publication had an impact on their behaviour

| Column %  | 2023-24 | 2019-20 |
|---|---------|---------|
| I have more information to protect myself against harmful activities such as fraud and scams  | 46%     | 49%     |
| I did not do anything, but I have more knowledge on anti-competitive activity   | 15%     | 22%     |
| I changed my purchasing behaviour   | 8%      | 24%     |
| I visited the Competition Bureau's website for more information   | 8%      | 12%     |
| I contacted the Canadian Anti-Fraud Centre  | 3%      | 5%      |
| I filed a complaint with the RCMP or local police   | 3%      | 2%      |
| I filed a complaint with the Better Business Bureau   | 3%      | 2%      |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 2%      | 3%      |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 0%      | 1%      |
| Don't know / Prefer not to answer   | 13%     | 19%     |
| Sample size   | 112     | 157     |

Exhibit A18: Q23: You indicated that each of the following have had an impact on your behaviour as a consumer. For each, please indicate what type of impact it had using the drop-down menu provided. The Competition Bureau's *Deceptive Marketing Practices Digest* – a publication that offers advice and presents the Bureau's perspective on advertising and marketing practices.

Base: Among those who indicated the publication had an impact on their behaviour

| Column %  | 2023-24 | 2019-20 |
|---|---------|---------|
| I have more information to protect myself against harmful activities such as fraud and scams  | 29%     | 45%     |
| I changed my purchasing behaviour   | 20%     | 24%     |
| I visited the Competition Bureau's website for more information   | 14%     | 10%     |
| I did not do anything, but I have more knowledge on anti-competitive activity   | 13%     | 28%     |
| I contacted the Canadian Anti-Fraud Centre  | 3%      | 3%      |
| I filed a complaint with the RCMP or local police   | 3%      | 1%      |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 2%      | 2%      |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 1%      | 4%      |
| I filed a complaint with the Better Business Bureau   | 1%      | 1%      |

|                                   |     |     |
|-----------------------------------|-----|-----|
| Don't know / Prefer not to answer | 13% | 14% |
| Sample size                       | 90  | 134 |

Exhibit A19: Q29: You indicated that each of the following have had an impact on your behaviour as a consumer. For each, please indicate what type of impact it had using the drop-down menu provided. (2023-24) The Competition Bureau's competition promotion work, such as its market studies, submissions to government consultations, summits, and open letters to regulators and policymakers. / (2019-20) The Competition Bureau's competition promotion work, such as its market studies, white papers, the Competition Advocate, and open letters to regulators and policymakers.

Base: Among those who indicated the publication had an impact on their behaviour

| Column %  | 2023-24 | 2019-20 |
|---|---------|---------|
| I have more information to protect myself against harmful activities such as fraud and scams  | 33%     | 37%     |
| I did not do anything, but I have more knowledge on anti-competitive activity   | 27%     | 25%     |
| I changed my purchasing behaviour   | 13%     | 25%     |
| I visited the Competition Bureau's website for more information   | 7%      | 7%      |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 4%      | 4%      |
| I contacted the Canadian Anti-Fraud Centre  | 2%      | 10%     |
| I filed a complaint with the RCMP or local police   | 2%      | 2%      |
| I filed a complaint with the Better Business Bureau   | 1%      | 1%      |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 1%      | 1%      |
| Don't know / Prefer not to answer   | 10%     | 19%     |
| Sample size   | 94      | 111     |

Exhibit A20: Q25: You indicated that each of the following have had an impact on your behaviour as a consumer. For each, please indicate what type of impact it had using the drop-down menu provided. Updates on the Competition Bureau's major enforcement cases.

Base: Among those who indicated the publication had an impact on their behaviour

| Column %  | 2023-24 | 2019-20 |
|---|---------|---------|
| I have more information to protect myself against harmful activities such as fraud and scams  | 39%     | 50%     |
| I did not do anything, but I have more knowledge on anti-competitive activity   | 23%     | 27%     |
| I changed my purchasing behaviour   | 16%     | 24%     |
| I visited the Competition Bureau's website for more information   | 9%      | 11%     |
| I filed a complaint with the RCMP or local police   | 1%      | 0%      |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 1%      | 1%      |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 1%      | 1%      |
| I filed a complaint with the Better Business Bureau   | 1%      | 2%      |
| I contacted the Canadian Anti-Fraud Centre  | 0%      | 3%      |
| Don't know / Prefer not to answer   | 7%      | 17%     |
| Sample size   | 82      | 123     |

Responses to a series of attitudinal statements about the Bureau continue to demonstrate that there is widespread belief that the Bureau is making a positive contribution. Generally, consumers feel the Bureau's work is important and have some interest in the agency's activities.

Almost three-quarters (74%) note that they would trust information provided by the Bureau. The same number (74%) agree that the Bureau's work is beneficial to the economy. Over two-thirds (71%) are interested in learning more about the Bureau.

- Those 55 or older are more likely to agree than those 35 to 54 or 18 to 34 that the Bureau's work is beneficial to the economy (80% vs. 68% vs. 70%), that they are interested in hearing more from the Bureau (79% vs. 67% vs. 62%), and that they trust the information the Bureau provides (78% vs. 70% vs. 71%).
- Those with a household income of \$80,000 or greater are more likely than those with a household income of \$40,000 to just under \$80,000 to agree that they trust the information the Bureau provides (78% vs. 70%).
- Those familiar with the Bureau are more likely than others to agree with all of the statements.

Though, as previously discussed, recall of the Bureau's involvement in most of the activities and cases tested in the survey, and recall of the Bureau itself, is not widespread, the plurality (40%, down 5% since the previous wave) agree that they have heard of an activity the Bureau does, but did not realize the Bureau was involved.

- Those 55 or older are more likely to agree that they knew of the Bureau's activities, but did not know it was involved, than those 35 to 54 (45% vs. 37%) and those 18 to 34 (45% vs. 37%).

Consistent with the previous wave, over half feel confident they can identify online scams (58%) and have the information they need to make decisions when participating in the digital marketplace (54%, up 3%).

- Respondents 18 to 34 are more likely than those 35 to 54 and those 55 or older to agree that they feel confident they can identify online scams (79% vs. 68% vs. 70%). They are also more likely than those 55 or older to agree they have the information they need to make informed decisions when participating in the digital marketplace (61% vs. 49%).
- Quebecers are the least likely of all regions to agree that they feel confident they can identify online scams (57%) and that they have the information they need to make informed decisions when participating in the digital marketplace (46%).
- Those with a household income of \$80,000 or greater are more likely than those with a household income of \$40,000 to just under \$80,000 and those with a household income of \$40,000 or less to agree they have the information they need to make informed decisions when participating in the digital marketplace (60% vs. 48% vs. 51%).

### **Qualitative insights: Experience with fraudulent activity**

Regardless of whether they were or knew a victim of fraud or a scam, virtually all participants volunteered that they had been or knew someone recipient of attempted scams. The descriptions of the incidents varied somewhat, but none indicated having explicitly contacted the Bureau as a result. Examples of scams mentioned often included identity theft; rental property listing scams; door-to-door scams; fraudulent texts or phone calls through social media; online dating scams; and phishing scams. Actions taken tended to involve a Google search for information about scams or verification of scams; confronting the company



committing the harm; contacting a bank; contacting a “government agency”; or local law enforcement.

“The bank account was emptied, and I had help from the bank and the police.” – Consumer (French)

Exhibit A21: Q43-49: To what extent do you agree or disagree with the following statements? % Agree displayed.

Base: All respondents

| Column %  | 2023-24 | 2019-20 |
|---|---------|---------|
| I would trust information provided by the Competition Bureau  | 74%     | 72%     |
| I believe the Competition Bureau’s work is beneficial to the economy  | 74%     | 73%     |
| I feel confident that I can identify online scams and fraudulent behaviour  | 72%     | NA      |
| I am interested in hearing, reading or seeing more from the Competition Bureau  | 70%     | 67%     |
| I feel confident that I can identify and report online scams and fraudulent behaviours  | 58%     | 59%     |
| I have the information I need to make informed decisions when participating in the digital marketplace, such as purchasing products or comparing prices | 54%     | 51%     |
| I have heard of activities the Competition Bureau does, but I was not aware they were involved  | 40%     | 45%     |
| I could recognize anti-competitive behaviours   | 39%     | NA      |
| Sample size   | 1034    | 1023    |

### Contact with the Bureau

Consistent with the previous wave, very few consumers (6%) say they have contacted the Bureau or had in-person contact (4%).

- Men are more likely than women to have contacted the Bureau (8% vs. 3%).
- Of note, those 18 to 34 (11%) are more likely than those 35 to 54 (5%) and those 55 or older (3%) to have contacted the Bureau.

The most popular ways respondents contacted the Bureau was through social media (35%, up 26% since the previous wave), submitting an online complaint (34%) and calling the Bureau’s Information Centre (31%). The most common reasons for contacting the Bureau include to report a scam (39%, up 8%), for information on CA Identification Numbers (22%), or to file a complaint (21%). Two-thirds of those who contacted the Bureau (67%, up 18%) are satisfied with the contact they had with the Bureau.

Exhibit A22: Q38: Before doing this survey, have you ever contacted the Competition Bureau?

Base: All respondents

| Column %                           | 2023-24 | 2019-20 |
|------------------------------------|---------|---------|
| Yes, in the past 12 months         | 1%      | 1%      |
| Yes, but not in the past 12 months | 5%      | 4%      |
| No                                 | 90%     | 93%     |
| Don’t know / Prefer not to answer  | 5%      | 1%      |
| Sample size                        | 1034    | 1023    |

Exhibit A23: Q42: Have you ever had any in-person contact with the Competition Bureau, such as at a tradeshow, conference, or outreach event?

Base: All respondents

| Column %                           | 2023-24 |
|------------------------------------|---------|
| Yes, in the past 12 months         | 1%      |
| Yes, but not in the past 12 months | 3%      |
| No                                 | 92%     |
| Don't know / Prefer not to answer  | 5%      |
| Sample size                        | 1034    |

Exhibit A24: Q39: How did you contact the Competition Bureau? [Accept all]

Base: Among those who have contacted the Competition Bureau (Q38)

| Column %   | 2023-24 | 2019-20 |
|--|---------|---------|
| Through social media (Facebook, Twitter, Reddit or LinkedIn) | 35%     | 9%      |
| I sent them an online complaint                              | 34%     | 35%     |
| I called their Information Centre                            | 31%     | 26%     |
| I called the Federal Contracting Fraud Tip Line              | 22%     | 13%     |
| My lawyer contacted the Competition Bureau for me            | 13%     | 10%     |
| Other (specify)  | 3%      | 4%      |
| Don't know / Prefer not to answer                            | 4%      | 10%     |
| Sample size  | 58      | 53      |

Exhibit A25: Q40: Why did you contact the Competition Bureau? [Accept all]

Base: Among those who have contacted the Competition Bureau (Q38)

| Column %   | 2023-24 | 2019-20 |
|--|---------|---------|
| To report a scam or other deceptive marketing practice                 | 39%     | 31%     |
| For information on CA Identification Numbers                           | 22%     | 5%      |
| To file a complaint  | 21%     | 21%     |
| To request a publication (e.g. the <i>Little Black Book of Scams</i> ) | 17%     | 2%      |
| For information on their labelling laws                                | 13%     | 15%     |
| For information on the <i>Competition Act</i>                          | 12%     | 22%     |
| To request a community presentation                                    | 10%     | 7%      |
| For information on an investigation                                    | 10%     | 11%     |
| Other (specify)  | –       | 2%      |
| Don't know / Prefer not to answer                                      | 4%      | 12%     |
| Sample size  | 58      | 53      |

Exhibit A26: Q41: Overall, how satisfied have you been with the contact that you have had with the Competition Bureau?

Base: Among those who have contacted the Competition Bureau (Q38)

| Column %                           | 2023-24 | 2019-20 |
|------------------------------------|---------|---------|
| Very satisfied                     | 30%     | 28%     |
| Somewhat satisfied                 | 37%     | 21%     |
| Neither satisfied nor dissatisfied | 22%     | 25%     |
| Somewhat dissatisfied              | 8%      | 13%     |
| Very dissatisfied                  | 2%      | 6%      |
| Don't know / Prefer not to answer  | 4%      | 8%      |
| Sample size                        | 58      | 53      |

When it comes to how respondents would prefer to receive information from the Bureau, email is most popular (48%), followed by news media (38%), social media (28%) and the Bureau’s website (23%).

- Respondents 18 to 34 (34%) and 35 to 54 (30%) are more likely than those 55 or older (22%) to prefer social media. Those 55 or older prefer email (51%) or news media (45%).

Exhibit A27: Q50: What method of communication would you prefer if you were to receive information about and from the Competition Bureau? [Accept all]

Base: All respondents

| Column %   | 2023-24 | 2019-20 |
|--|---------|---------|
| Email  | 48%     | 50%     |
| News media   | 38%     | 35%     |
| Social media (Facebook, Twitter, Reddit or LinkedIn) | 28%     | 24%     |
| Competition Bureau website                           | 23%     | 21%     |
| Regular mail   | 19%     | 17%     |
| Telephone  | 5%      | 4%      |
| In-person  | 5%      | 2%      |
| I am not interested in receiving any information     | 9%      | 15%     |
| Don't know / Prefer not to answer                    | 6%      | 4%      |
| Sample size  | 1034    | 1023    |

**Qualitative insights: Information needs**

In terms of information needs, many volunteered an interest in learning more about the specific activities/cases the Bureau is investigating as well as the status of investigations and/or outcomes. Consumers were also interested in a list of companies being investigated or that had been deemed negligent (publishing a list like the one shown during the groups).

“Their current cases they’re working on, as it can help us know what is currently happening.”  
– Consumers (French)

In terms of receiving information, participants cited social media (Facebook, X, Instagram, Tik Tok, LinkedIn, YouTube, Reddit were mentioned specifically) as a logical source. A few also suggested that the Bureau’s activities would be interesting fodder for a podcast.

**The Bureau’s future work**

The most commonly chosen industries that consumers feel that the Bureau’s future work should focus on are retail trade (29%), banking and finance (28%), telecommunications (27%; which was also called out in the qualitative sessions), health care and pharmaceuticals (24%), and accommodation and food services (20%).

- Women are more likely than men to prioritize health care and pharmaceuticals (30% vs. 19%), utilities (13% vs. 8%), and educational services (8% vs. 4%). Men are more likely to prioritize telecommunications (31% vs. 24%) and construction (18% vs. 9%).
- Respondents 18 to 34 are more likely to select real estate and rental and leasing (14%) than those 35 to 54 (9%).
- Respondents 55 or older are more likely than younger groups to pick banking and finance (36%), telecommunications (33%), health care and pharmaceuticals (33%), and retail gas (17%).

- Respondents in Quebec are more likely than those in other areas to select banking and finance (32%), construction (23), E-commerce platforms (21%), and retail gas (21%).

Exhibit A28: Q51: The Competition Bureau is an independent federal law enforcement agency that ensures Canadian businesses and consumers prosper in a competitive and innovative marketplace. It investigates anti-competitive activities, protects consumers, and promotes competitive markets. Now that you know more about the Competition Bureau, in which sectors of the economy should the Bureau focus its work? [Accept up to three]

Base: All respondents

| Column %   | 2023-24 | 2019-20 |
|--|---------|---------|
| Retail trade (e.g. grocery stores, department stores and automobile dealers)     | 29%     | 30%     |
| Banking and finance  | 28%     | 27%     |
| Telecommunications   | 27%     | 36%     |
| Health care and pharmaceuticals  | 24%     | 28%     |
| Accommodation and food services (e.g. hotels and restaurants)                    | 20%     | 5%      |
| E-commerce platforms (e.g. Amazon, Shopify, Facebook Marketplace and eBay)       | 16%     | 25%     |
| Retail gas (e.g. gas stations)   | 14%     | 24%     |
| Construction   | 14%     | 6%      |
| Real estate and rental and leasing   | 11%     | 13%     |
| Utilities (e.g. electric power generation and natural gas distribution)          | 11%     | 19%     |
| Waste management services (e.g. waste collection and treatment)                  | 9%      | 5%      |
| Agriculture, forestry, fishing and hunting                                       | 7%      | 4%      |
| Social media platforms (e.g. Facebook, Twitter, and Instagram)                   | 6%      | 18%     |
| Educational services   | 6%      | 6%      |
| Transportation (e.g. air and rail transportation, and municipal transit systems) | 6%      | 8%      |
| Manufacturing  | 4%      | 6%      |
| Arts, entertainment and recreation   | 2%      | 2%      |
| All sectors  | 1%      | 1%      |
| Other (please specify)   | 1%      | –       |
| None / Nothing   | –       | –       |
| Don't know / Prefer not to answer  | 13%     | 1%      |
| Sample size  | 1034    | 1023    |

## B. Businesses

The businesses section is divided into the following parts:

1. the first explains overall awareness and general perceptions of the Bureau and the four Acts it enforces;
2. the second deals with awareness and perceptions of the Bureau's activities and performance;
3. the third focuses on the impact of the Bureau's work;
4. the fourth summarizes contact with the Bureau, including preferred methods of communication;
5. the fifth outlines views regarding where the Bureau should focus future efforts;
6. and the sixth (a new part) explores views related to proposed changes to the *Competition Act*.

### Overall awareness and general perceptions of the Bureau

One-in-five SMBs (20%) identify the Competition Bureau (or the Competition Bureau of Canada) as the organization responsible for enforcing competition and labelling laws, which is consistent with the previous wave (17%). Twice as many multinationals this wave identify the Bureau on an unaided basis (31% vs. 15%).

- SMBs with 1 to 4 employees and 5 to 99 employees are more likely to say they are unable to name an organization responsible (15% and 16%, respectively) compared to those with 100 to 499 employees (4%).

Mirroring last wave (14%), fewer than one-fifth (18%) of SMBs say they are familiar with the Bureau. Six in ten (59%) say they are not familiar with it.

- There is a correlation with business size and familiarity with the Bureau, whereby familiarity increases as the number of employees does. Specifically, 12% of SMBs with 1 to 4 employees say they are familiar with the Bureau, compared to 24% of SMBs with 5 to 99 employees and 41% of SMBs with 100 to 499 employees.

Up 11% since last wave, 38% of multinationals say they are familiar with the Bureau. One-third (33%) say they are not familiar with it.

On balance, the information provided in the survey adds to SMB respondents' understanding of the Bureau – 41% were aware of it, but learned more from the survey, while 45% say they did not know about the Bureau prior to the survey. There is no meaningful change since last wave.

- Businesses with 100 to 499 employees are more likely to say that the description was already in line with their understanding of the Bureau (26%), compared to 8% of businesses with 1 to 4 employees and 16% of those with 5 to 99 employees.

Four-in-five multinationals (81%) claim the description provided to them adds to their understanding of the Bureau (62%) or that they had not previously heard of the Bureau (19%). Comparable to last wave (17%), 14% say that the description was already their understanding of the Bureau; however fewer this wave say that they did not know about the Bureau before the survey (19% vs. 30%).

### **Qualitative insights: Basic awareness and knowledge of the Bureau**

Consistent with the qualitative findings last wave, most SMBs and multinationals were not all that knowledgeable and seemed to have only basic knowledge about the Bureau. As we experienced last wave, SMBs and multinationals tended to respond from the perspective of a consumer rather than a businessperson.

“I haven’t heard of them, but they sound like they would deal with mergers and stuff like that. Sounds like a bigger thing than my small business” – SMB

On an unaided basis, few, if any, SMBs or multinationals named the Competition Bureau as the government agency dedicated to addressing issues related to certain types of fraud. Instead, they tended to refer to the government (broadly), or other departments depending on their industry sector or issue (for example, Health Canada; Immigration, Refugees and Citizenship Canada), the Better Business Bureau, the Canadian Anti-Fraud Centre, the RCMP and local police. On an aided basis, most had heard of the Bureau though they admitted to mostly only having heard the name.

“I’ve heard the name. Can’t say exactly what they do, and I researched them to prepare for this call. I was surprised to hear it is a federal department. It helps keep things fair for consumers and businesses.” – Multinational

“The name rings a bell. I’ve heard it in passing. I don’t remember where, but my impression is that they regulate advertising for products or labelling. They do business compliance.” – SMB

Most could deduce that the Bureau’s role must relate to ensuring there is ample and fair competition in the Canadian marketplace. Specific activities that were suggested as being associated with the Bureau’s role included: price-fixing, abuse of dominance (monopolization), misleading advertising, and mergers and acquisitions.

“I think they’re the fraud office of the Attorney General.” – Multinational

“They make sure contracts are awarded impartially and there isn’t too much concentration in the economy of one company dominating.” – Multinational

Exhibit B1: Q6: Can you name the organization responsible for enforcing federal competition laws and labelling laws (except as it relates to food products)?

Base: All respondents

| Column %   | SMBs    |         | Multinationals |         |
|--|---------|---------|----------------|---------|
|  | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| Competition Bureau / Competition Bureau of Canada          | 20%     | 17%     | 31%            | 15%     |
| Food and Drug Administration (FDA)                         | 4%      | 5%      | 7%             | 8%      |
| Consumer Affairs / Consumer Protection                     | 1%      | 4%      | 2%             | 4%      |
| Canadian Food Inspection Agency (CFIA)                     | 3%      | 3%      | 7%             | 2%      |
| Health Canada  | 3%      | 2%      | –              | 3%      |
| Federal government / Government                            | 5%      | 1%      | 2%             | 1%      |
| <i>Competition Act</i>                                     | –       | –       | 2%             | –       |
| Innovation, Science and Economic Development Canada (ISED) | –       | –       | 2%             | –       |

|                                   |     |     |     |     |
|-----------------------------------|-----|-----|-----|-----|
| Other                             | 11% | 10% | 17% | 9%  |
| None / Nothing                    | 38% | 46% | 24% | 38% |
| Don't know / Prefer not to answer | 16% | 13% | 7%  | 21% |
| Sample size                       | 407 | 401 | 58  | 117 |

Exhibit B2: Q24: How familiar are you, if at all, with the Competition Bureau? Please use a scale from 1 to 5 where 1 means "Not at all familiar" and 5 means "Very familiar."

Base: All respondents

| Column %                          | SMBs    |         | Multinationals |         |
|-----------------------------------|---------|---------|----------------|---------|
|                                   | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| 1-Not at all familiar             | 33%     | 42%     | 14%            | 23%     |
| 2                                 | 26%     | 23%     | 19%            | 26%     |
| 3                                 | 22%     | 20%     | 29%            | 23%     |
| 4                                 | 12%     | 9%      | 28%            | 20%     |
| 5-Very familiar                   | 6%      | 5%      | 10%            | 7%      |
| Don't know / Prefer not to answer | 1%      | 2%      | –              | 1%      |
| Sample size                       | 407     | 401     | 58             | 117     |

Exhibit B3: Q25: (2023-24) The Competition Bureau is an independent law enforcement agency that investigates anti-competitive activities, protects consumers and promotes competitive markets. It is responsible for the administration and enforcement of the *Competition Act*, the *Textile and Labelling Act*, the *Consumer Packaging and Labelling Act* (except as it relates to food), and the *Precious Metals Marking Act*. Which statement best reflects your knowledge of the Competition Bureau before completing this survey?

Base: All respondents

| Column %   | SMBs    |         | Multinationals |         |
|--|---------|---------|----------------|---------|
|  | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| This was already my understanding of the Competition Bureau          | 12%     | 11%     | 14%            | 17%     |
| This adds to what I already knew of the Competition Bureau           | 41%     | 41%     | 62%            | 48%     |
| I did not know about the Competition Bureau before doing this survey | 45%     | 44%     | 19%            | 30%     |
| Don't know / Prefer not to answer                                    | 2%      | 4%      | 5%             | 5%      |
| Sample size  | 407     | 401     | 58             | 117     |

Very few SMBs (10%) clearly recall hearing something about the Bureau; one-quarter (25%) vaguely recall hearing something. This is consistent with the previous wave where 8% had clear recall and 27% had vague recall.

- Businesses with 100 to 499 employees are more likely to recall hearing or seeing something about the Bureau (67%), compared to 31% of businesses with 1 to 4 employees and 40% of those with 5 to 99 employees.

Recall among multinationals is also consistent since last year. In the past year, one-in-six multinationals (16%) have clear recall of the Bureau and 36% have vague recall, compared to 12% and 45% last wave.

Knowledge of various terms related to the Bureau's work is, for the most part, not widespread among SMBs. At just under half (49%), the highest proportion of SMBs claim to be aware (4-5 on a 5-point scale) of misleading advertising and deceptive marketing practices. Between one-

third and roughly two-in-five SMBs are aware of abuse of dominance (43%) (up 9% since last wave); price-fixing, bid-rigging, collusion (39%); mergers and acquisitions (36%), mass-marketing fraud (33%); and wage fixing and no-poaching agreements (33%). Just one-quarter (25%) of SMBs are aware of consumer packaging and textile labelling, marking of precious metals.

- Respondents working at SMBs with 100 to 499 employees are more likely than those whose companies employ fewer people to say they are aware of each activity. For example, 64% say they are aware of price-fixing, bid-rigging, and collusion, compared to 41% among businesses that employ 1 to 4 people and 36% among those that employ 5 to 99.
- Those who work at for-profit SMBs are more likely than not-for-profits to say that they are aware of the terms wage-fixing and no-poaching agreements (38% vs. 21%).

Half or more of multinationals are familiar with each of the activities tested, with exception of mergers and acquisitions (48%). Two-thirds (66%) of multinationals are aware of misleading advertising (up 16% since last wave). Half or more of multinationals are aware of abuse of dominance (53%; up 11%); wage fixing and no-poaching agreements (53%); consumer packaging and textile labelling and marking of precious metals (52%; up 24%); price-fixing, bid-rigging, collusion (50%); and mass-marketing fraud (50%).

Two-thirds (64%) of SMBs believe that the laws to protect consumers and businesses against activities that could significantly hinder innovation and competition, reduce choice of products or services, or raise prices are important (rating of 4 or 5, on a 5-point scale); one-fifth (19%) say they are not important (rating of 1 or 2). Three-quarters (76%) of multinationals feel that the laws to protect consumers and businesses, while 9% would consider them to be not very important (rating of 2). No multinationals feel that the laws are “not at all” important.

**Qualitative insights: Awareness of the Bureau’s activities**

Most SMBs and multinationals could not recall having seen, read or heard anything about the Bureau in recent years. Those who tended to recall having heard about some of the Bureau’s cases mentioned having heard about different mergers and acquisitions. The Rogers’ acquisition of Shaw was mentioned specifically a couple of times, though these participants/interviewees did not seem to be confident in their awareness of the Bureau’s role in this case.

As with consumers and as we will see later with respect to regulators and policymakers, SMBs and multinationals had a decent understanding of terms related to anti-competitive behaviour.

Exhibit B4: Q26: Over the past year, how clearly do you recall seeing or hearing anything about the Competition Bureau?

Base: All respondents

| Column %                                   | SMBs    |         | Multinationals |         |
|--|---------|---------|----------------|---------|
|  | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| Do not recall seeing or hearing anything   | 60%     | 61%     | 41%            | 38%     |
| Vaguely recall seeing or hearing something | 25%     | 27%     | 36%            | 45%     |
| Clearly recall seeing or hearing something | 10%     | 8%      | 16%            | 12%     |
| Don’t know / Prefer not to answer          | 4%      | 4%      | 7%             | 5%      |
| Sample size                                | 407     | 401     | 58             | 117     |



Exhibit B5: Q7-13: Please indicate how aware you are, if at all, of the following activities. Please use a scale from 1 to 5 where 1 means “Not at all aware” and 5 means “Very aware”? % Aware displayed.

Base: All respondents

| Row %  | SMBs    |         | Multinationals |         |
|--|---------|---------|----------------|---------|
|  | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| Misleading advertising and deceptive marketing practices                 | 49%     | 50%     | 66%            | 50%     |
| Abuse of dominance (monopolization)                                      | 43%     | 34%     | 53%            | 42%     |
| Price-fixing, bid-rigging, collusion                                     | 39%     | 34%     | 50%            | 51%     |
| Mergers and acquisitions   | 36%     | 29%     | 48%            | 48%     |
| Mass-marketing fraud   | 33%     | 30%     | 50%            | 40%     |
| Wage fixing and no-poaching agreements                                   | 33%     | NA      | 53%            | NA      |
| Consumer packaging and textile labelling, and marking of precious metals | 25%     | 22%     | 52%            | 28%     |
| Sample size  | 407     | 401     | 58             | 117     |

Exhibit B6: Q14: Canada has laws to protect consumers and businesses against activities that could significantly hinder innovation and competition, reduce choice of products or services, or raise prices. How important is it to your organization, if at all, that these laws are in place? Please use a scale from 1 to 5 where 1 means “Not at all important” and 5 means “Very important.”

Base: All respondents

| Column %                          | SMBs    | Multinationals |
|-----------------------------------|---------|----------------|
|                                   | 2023-24 | 2023-24        |
| 1-Not at all important            | 7%      | –              |
| 2                                 | 12%     | 9%             |
| 3                                 | 14%     | 14%            |
| 4                                 | 21%     | 24%            |
| 5-Very important                  | 43%     | 52%            |
| Don't know / Prefer not to answer | 3%      | 2%             |
| Sample size                       | 407     | 58             |

In terms of the four Acts enforced by the Bureau, SMB respondents are most familiar with the *Competition Act* (37; up 7% since last wave), followed by the *Consumer Packaging and Labelling Act* (35%), the *Textile Labelling Act* (28%) and the *Precious Metals Marking Act* (17%).

- SMB respondents with 100 to 499 employees are more familiar with each law than respondents whose businesses employ fewer people. For example, 70% are aware of the *Consumer Packaging and Labelling Act*, compared to 31% of businesses with 1 to 4 employees and 38% of businesses with 5 to 99 employees.

Among these Acts, the *Competition Act* is most often seen as the law of greatest relevance to respondents’ companies/organizations (24% directly relevant), followed by the *Consumer Packaging and Labelling Act* (16%), the *Textile Labelling Act* (14%, up 8% since last wave) and the *Precious Metals Marking Act* (10%, down 7%).

- Generally, businesses with 100 to 499 employees are more likely to believe the Acts are relevant to them than businesses with fewer employees. Businesses with 5 to 99 employees are as likely as larger SMBs to feel the *Consumer Packaging and Labelling Act*, and both are more likely than businesses with 1 to 4 employees (31%).

- For-profit businesses are more likely than not-for-profits to agree that the *Competition Act* (73% vs. 52%) and the *Precious Metals Marking Act* (35% vs. 16%) are relevant to them.

Multinational respondents are most familiar with the *Competition Act* (62%, up 15%), followed by the *Consumer Packaging and Labelling Act* (50%), the *Textile Labelling Act* (45%, up 13%) and the *Precious Metals Marking Act* (40%, up 14%). Similar to the findings among SMB respondents, among these Acts, the *Competition Act* is most often seen as the law of greatest relevance to multinational respondents' companies/organizations (41% directly relevant). Fewer find the *Consumer Packaging and Labelling Act* (31%, up 14%), the *Textile Labelling Act* (33%, up 22%) and the *Precious Metals Marking Act* (21%, up 14%) directly relevant.

Compared to last wave, fewer SMBs (42%, down 25%) and multinationals (36%, down 23%) say they are likely to go to a Government of Canada website to find out more about the Acts. Over half (55%) of multinationals say they would go directly to the Competition Bureau, compared to one-third (35%) of SMBs.

### **Qualitative insights: Understanding of the Bureau's mandate**

Awareness and knowledge of the *Competition Act* and three related Acts continued to be low among SMBs and multinationals, though consistent with the quantitative results, multinationals seemed to be a little more familiar with the four Acts.

Despite the limited awareness and knowledge of these Acts, however, most tended to believe that they did relate to either their businesses or their lives, even if it tended not to be something of which they were cognizant on a day-to-day basis. Prompting with examples such as truth in advertising, investigating cartels, preventing abuse of market power or reviewing mergers encouraged participants (across all audiences) to recognize that there were additional aspects of the Bureau's mandate that was important to them.

The *Competition Act* was the one most likely to be identified as related to one's business, although some pointed out this was in terms of the protection it provided them rather than in terms of business decisions or actions their companies take.

"Nobody is going to be affected by what we do as a small business" – SMB

"We don't have price-fixing issues, but we do have competitors who have a monopoly in the business." – Multinational

Most global multinationals continued to recognize the relevance of the *Competition Act* in relation to their businesses especially in the context of mergers, acquisitions, pricing policies, and intellectual property as business activities that had to comply with the *Competition Act*.

Participants across all groups tended to agree on the relevance of the two Acts related to labelling, the *Consumer Packaging and Labelling Act* and the *Textile Labelling Act*, though instinctually most thought of food product labelling and rarely of textiles. When asked not to focus on the labelling of food products, participants tended to think labelling information in the context of country of origin or manufacture and the use of both official languages, was of relevance to them. The few SMBs that sell or import a packaged product were familiar with one or both of the labelling Acts, but for those providing only services or fresh foods, these Acts were not being discussed in terms of their relevance to their business.

Having said all this, few SMBs or global multinationals felt they were likely to contact the Bureau directly about compliance with any Act. Several SMBs mentioned they may refer to Google, “in a panic”, while others, and global multinationals specifically, mentioned they would refer matters of compliance to their legal counsel.

“I have boards within my company where I can report or ask question. But I wouldn't go to the government.” – Multinational

“I would just ignore it, or google it worst case” – SMB

Exhibit B7: Q15-18: Please indicate how familiar you, if at all, with each of the following laws. Please use a scale from 1 to 5 where 1 means "Not at all familiar" and 5 means "Very familiar." % Familiar displayed.

Base: All respondents

| Row %   | SMBs    |         | Multinationals |         |
|---|---------|---------|----------------|---------|
|   | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| A federal law called the <i>Competition Act</i> that governs most business conduct in Canada with the purpose of maintaining and encouraging competition and ensuring businesses have a fair opportunity to participate in the Canadian economy | 37%     | 30%     | 62%            | 47%     |
| A federal law called the <i>Consumer Packaging and Labelling Act</i> that requires that prepackaged consumer products (excluding food) have accurate and meaningful labelling information   | 35%     | 33%     | 50%            | 42%     |
| A federal law called the <i>Textile Labelling Act</i> that requires that textile articles, such as clothing, have accurate and meaningful labelling information   | 28%     | 25%     | 45%            | 32%     |
| A federal law called the <i>Precious Metals Marking Act</i> that covers the requirements for the marking of precious metals such as gold and silver   | 17%     | 17%     | 40%            | 26%     |
| Sample size   | 407     | 401     | 58             | 117     |

Exhibit B8: Q19-22: For the same list of laws, please indicate whether each is relevant or not to your company. % Directly relevant displayed.

Base: All respondents

| Row %  | SMBs    |         | Multinationals |         |
|--|---------|---------|----------------|---------|
|  | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| A federal law called the <i>Competition Act</i> that governs most business conduct in Canada with the purpose of maintaining and encouraging competition and ensuring that businesses have a fair opportunity to participate in the Canadian economy | 24%     | 20%     | 41%            | 38%     |
| A federal law called the <i>Consumer Packaging and Labelling Act</i> that requires that prepackaged consumer products (excluding food) have accurate and meaningful labelling information  | 16%     | 14%     | 31%            | 17%     |

|   |     |     |     |     |
|---|-----|-----|-----|-----|
| A federal law called the <i>Textile Labelling Act</i> that requires that textile articles, such as clothing, have accurate and meaningful labelling information | 14% | 6%  | 33% | 11% |
| A federal law called the <i>Precious Metals Marking Act</i> that covers the requirements for the marking of precious metals such as gold and silver             | 10% | 17% | 21% | 7%  |
| Sample size   | 407 | 401 | 58  | 117 |

Exhibit B9: Q23: If you need general information about competition law or compliance with any of these Acts, who or what would you consult? Please select all that apply.

Base: All respondents

| Row %  | SMBs    |         | Multinationals |         |
|--|---------|---------|----------------|---------|
|  | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| A Government of Canada website                             | 42%     | 67%     | 36%            | 59%     |
| Internet search  | 41%     | 48%     | 29%            | 53%     |
| Lawyer/Legal counsel                                       | 40%     | 36%     | 41%            | 48%     |
| The Competition Bureau                                     | 35%     | 33%     | 55%            | 47%     |
| Family/Friends   | 13%     | 9%      | 17%            | 12%     |
| Chambers of Commerce / Trade associations                  | 9%      | –       | 14%            | –       |
| The Canadian Anti-Fraud Centre                             | 8%      | 16%     | 16%            | 26%     |
| Innovation, Science and Economic Development Canada (ISED) | 8%      | 10%     | 12%            | 18%     |
| Police (e.g. RCMP)   | 5%      | 5%      | 7%             | 3%      |
| Other  | –       | –       | 2%             | –       |
| Don't know / Prefer not to answer                          | 6%      | 4%      | 3%             | 5%      |
| Sample size  | 407     | 401     | 58             | 117     |

## Awareness and perceptions of the Bureau's activities and performance

Respondents were shown a list of eight cases pursued by the Bureau and were asked to identify which, if any, they recall hearing about. Including those who said they heard of “all of them”, approximately half of SMBs and multinationals have heard about the bread-fixing investigation (53% and 45%, respectively). Over two-in-five SMB respondents (45%) and one-third of multinational respondents (33%) recall the Bureau's attempt to seek a full-block of Rogers' proposed acquisition of Shaw. Fewer than one-fifth of respondents recall any of the other cases presented, and 29% of SMBs and 12% of multinationals say that they recall none of them.

- SMBs with 100 to 499 employees are more likely than those with 1 to 4 and 5 to 99 to recall hearing about the Bureau's Gatineau bid-rigging case (33% vs. 9% vs. 7%) and the Bureau's challenge of Secure Energy Services' acquisition of Tervita Corporation (26% vs. 8% vs. 4%).
- For-profit businesses are more likely than not-for-profit SMBs to recall hearing about the Bureau's review of the merger between admixture system firms Sika AG and MBCC Group (10% vs. 3%).

To measure recall of the Bureau's activities and publications, respondents were shown 14 examples (with short descriptions of each) to identify which they recall seeing or hearing about. Including those who said they recall “all of them”, significant proportions of SMBs (44%) and multinationals (26%) say that they have not seen or heard of any of the activities or publications presented. Among SMBs, recall is highest of the submissions to the Canadian Radio-Television

and Telecommunications (22%) and the market studies (16%). Over one-fifth of multinationals recall the dedicated telephone top line (22%), the enforcement guidance documents (22%) and the online complaint form (21%).

- Businesses with 100 to 499 employees are more likely than those with 1 to 4 and 5 to 99 to recall hearing about the Bureau’s online complaint form (26% vs. 10% vs. 9%) and the Bureau’s summits (18% vs. 6% vs. 3%).

Respondents were then shown the same list of activities and publications and were asked to identify any that they may have interest in. The highest level of interest among SMBs is for the *Little Black Book of Scams* (36%), the Business alerts (31%), and the annual Fraud Prevention Month campaign (25%). One-fifth or fewer of SMB respondents express interest in any of the other activities and publications, and nearly three-in-ten (28%) say that they are not interested in any of the activities or publications presented.

- SMBs that employ 100 to 499 people are more likely than those with 1 to 4 and 5 to 99 employees to express interest in the Deceptive Marketing Practices Digest (48% vs. 20% vs. 19%).

With interest levels between one-fifth and one-third of respondents, interest among multinationals is fairly consistent across all activities and publications (except the Immunity and Leniency Programs, where interest is lower).

#### **Qualitative insights: Awareness and impressions of the Bureau’s work**

In most instances, as noted in the last wave of research, exposure to examples of the Bureau’s various cases, activities and publications tends to improve impressions of the Bureau. Having said that, among a few SMBs and multinationals, there was a sense of awareness of anti-competitive behaviours in the marketplace that seemed to go unnoticed (and were not among the list of activities provided). This left them wondering how effective the Bureau is and whether the Bureau plays an independent surveillance role or only responds to reported incidents and complaints.

“What happens after these reports are published? Is there any teeth or meat on this?” – SMB

As mentioned earlier, almost all SMBs and multinationals had heard of the bread price-fixing investigation and Rogers’ acquisition of Shaw. The majority of multinationals had also heard of the Gatineau bid-rigging case, and some had heard of the unsubstantiated weight loss claims, though none were aware of the Bureau’s role in either of those cases.

In terms of outreach and advocacy examples of the Bureau’s work, unaided recall of such activity was lower than recall of Bureau cases covered in the news media. The examples that seemed to generate higher recall and/or enthusiasm, particularly among multinationals, included the Bureau’s enforcement guidance documents such as the Intellectual Property Enforcement Guidelines, Abuse of Dominance Guidelines, and Merger Enforcement Guidelines, the consumer and business alerts, and the *Little Black Book of Scams*. Many, across both audiences, also claimed to recall the example of the submissions to the CRTC and the Fraud Prevention Month campaign. Again, with most of these examples, awareness of the Bureau’s role was limited.

“I was aware of the Fraud Prevention Month campaign but had no idea it was the Competition Bureau.” – SMB

“The retail grocery market study is interesting but does raise a question. There has been an investigation ongoing and grocery stores were asked to present, but nothing has come of it. They are still recording record revenues.” – SMB

Exhibit B10: Q27: Below is a list of cases pursued by the Competition Bureau. For each of the following, please indicate if you recall hearing about it. Please select all that apply.

Base: All respondents

| Row %  | SMBs    | Multinationals |
|--|---------|----------------|
|  | 2023-24 | 2023-24        |
| The bread price-fixing investigation, where there is an ongoing investigation into alleged price-fixing between producers to raise wholesale bread prices, as well as alleged price-fixing between grocery stores to raise retail prices. Canada Bread Company Limited, a bread producer and distributor, was fined \$50 million after pleading guilty for its role in a criminal price-fixing arrangement   | 49%     | 45%            |
| The Competition Bureau's attempt to seek a full-block of Rogers' proposed acquisition of Shaw  | 41%     | 33%            |
| The Competition Bureau's actions to stop unsubstantiated weight loss claims  | 13%     | 17%            |
| The Competition Bureau investigation that led to multiple criminal charges against Mr. Terry Croteau of Ontario alleging the use of deceptive telemarketing and false or misleading statements to get Canadian businesses to sign up for listings in online directories  | 8%      | 17%            |
| The Dufresne Group Inc. (TDG) and its affiliates agreed to pay \$3.25M to settle the Competition Bureau's concerns over marketing claims. The investigation found that TDG offered certain products at inflated regular prices and then advertised them at big discounts, suggesting significant savings. In addition, they make marketing claims to consumers using sale end dates or countdown timers that gave false or misleading impression that deals on certain items would no longer be available after a certain time, when this was not the case | 7%      | 10%            |
| The Competition Bureau's Gatineau bid-rigging case, where an engineering executive was accused in a bid-rigging scheme that bilked the City of Gatineau out of an estimated \$1.8 million  | 5%      | 12%            |
| The Competition Bureau's review of the merger between admixture system firms Sika AG and MBCC Group  | 4%      | 9%             |
| The Competition Bureau's challenge of Secure Energy Services' acquisition of Tervita Corporation   | 2%      | 10%            |
| All of them  | 4%      | –              |
| None of them   | 25%     | 12%            |
| Don't know / Prefer not to answer  | 4%      | 7%             |
| Sample size  | 407     | 58             |

Exhibit B11: Q28: Below is a list of activities and publications pursued by the Competition Bureau. For each of the following, please indicate if you recall seeing or hearing about it. Please select all that apply.

Base: All respondents

| Row %   | SMBs    | Multinationals |
|---|---------|----------------|
|   | 2023-24 | 2023-24        |
| The Competition Bureau’s submissions to the Canadian Radio-Television and Telecommunications (CRTC) on telecommunications services  | 19%     | 16%            |
| The Competition Bureau’s market studies, such as the retail grocery market study  | 14%     | 12%            |
| The annual Fraud Prevention Month campaign  | 9%      | 12%            |
| The dedicated telephone tip line and online form to accept anonymous tips from Canadians who suspect fraud, collusion or corruption in federal government contracts and real estate property agreements   | 8%      | 21%            |
| The Competition Bureau’s efforts to communicate in plain language   | 8%      | 14%            |
| The Competition Bureau’s Business alerts on how to protect your business from fraudsters, or how to ensure compliance with the law in the snow removal business   | 7%      | 9%             |
| The Competition Bureau’s online complaint form where you can notify the Competition Bureau if you believe that a company or individuals have participated in anti-competitive activity  | 7%      | 19%            |
| The Competition Bureau’s publication called the <i>Deceptive Marketing Practices Digest</i>   | 6%      | 10%            |
| The Competition Bureau’s enforcement guidance documents, such as the enforcement guidelines on illegal wage-fixing and no-poaching agreements, Intellectual Property Enforcement Guidelines, Abuse of Dominance Guidelines, Merger Enforcement Guidelines, Competitor Collaboration Guidelines, and guidelines on “Product of Canada” and “Made in Canada” claims | 6%      | 21%            |
| The Competition Bureau’s guidance on compliance programs and/or compliance-related resources (e.g., compliance Hub, Bootcamps (learning modules), podcasts and presentations)   | 4%      | 10%            |
| The Competition Bureau’s publication called the <i>Little Black Book of Scams</i>   | 3%      | 10%            |
| The Competition Bureau’s report on competitive intensity in Canada from 2000-2020   | 3%      | 7%             |
| The Competition Bureau’s summits, which they host, such as the Green Growth Summit and Canada’s Competition Summit  | 3%      | 7%             |
| The Competition Bureau’s Immunity and Leniency Programs   | 2%      | 14%            |
| All of them   | 2%      | 2%             |
| None of them  | 44%     | 26%            |
| Don’t know / Prefer not to answer   | 9%      | 10%            |
| Sample size   | 407     | 58             |

Exhibit B12: Q29: Below is a list of Competition Bureau activities and publications. Please indicate all the ones, if any, that are of interest to you. % Interested displayed.

Base: All respondents

| Column % | SMBs    | Multinationals |
|----------|---------|----------------|
|          | 2023-24 | 2023-24        |

|  |     |     |
|--|-----|-----|
| The <i>Little Black Book of Scams</i> – a publication with tips to help consumers and businesses recognize and report scams in Canada  | 29% | 33% |
| The Competition Bureau's Business alerts - alerts with information for businesses about deceptive marketing practices, misleading advertising and scams  | 25% | 28% |
| The annual Fraud Prevention Month campaign   | 19% | 19% |
| Updates on the Competition Bureau's major enforcement cases  | 14% | 21% |
| The Competition Bureau's enforcement guidance documents such as the enforcement guidelines on illegal wage-fixing and no-poaching agreements, Intellectual Property Enforcement Guidelines, Abuse of Dominance Guidelines, Merger Enforcement Guidelines, Competitor Collaboration | 14% | 31% |
| The Competition Bureau's publication called the <i>Deceptive Marketing Practices Digest</i> – a publication that offers advice and presents the Bureau's perspective on advertising and marketing practices  | 13% | 31% |
| The Competition Bureau's competition promotion work with regulators and policymakers, including market studies, regulatory interventions and other related publications  | 11% | 21% |
| The Competition Bureau's guidance on compliance programs and/or compliance-related resources (e.g., compliance Hub, Bootcamps (learning modules), podcasts and presentations)  | 10% | 19% |
| The Competition Bureau's Immunity and Leniency Programs  | 7%  | 5%  |
| All of them  | 6%  | 3%  |
| None of them   | 28% | 9%  |
| Don't know / Prefer not to answer  | 8%  | 12% |
| Sample size  | 407 | 58  |

As was found among consumers, there is a tendency for SMB respondents to offer neutral performance ratings of the Bureau or to decline to rate the Bureau's performance at all. On each criteria tested, nearly half or more either offer a neutral rating or offer no response at all when asked to rate the Bureau's performance, suggesting a lack of information upon which to base a judgement. Among those who do provide a response, usually more believe the Bureau is doing well than believe it is doing poorly, and few SMBs feel the Bureau performs poorly on metrics tested. That is true aside from two examples where fairly equal proportions of respondents feel that the Bureau's performance is well and poor. Those relate to educating the public and are: educating Canadians on how to recognize anti-competitive behaviours (29% say well and 27% say poor) and educating Canadians on how to report suspected anti-competitive activities to the Competition Bureau (29% say well and 31% say poor). There is no discernable change in impressions among SMBs since last wave.

- SMB respondents with 100 to 499 employees are more likely to say the Bureau performs well at each of the activities presented than respondents whose businesses employ fewer people. For example, 61% say the Bureau performs well ensuring Canadian businesses can thrive and innovate in the digital marketplace, compared to 27% of businesses with 1 to 4 employees and 37% of businesses with 5 to 99 employees.
- For-profit SMBs are more likely than not-for-profits to say the Bureau performs well addressing the competition issues associated with the digital transformation (31% vs. 15%).



Again, like SMB respondents and consumers, multinationals are often reluctant to provide performance ratings of the Bureau, but among those offering ratings, the responses are far more often positive than negative, with one exception where the ratings are more balanced. That is, 31% of multinational respondents feel the Bureau performs well at educating Canadians on how to report suspected anti-competitive activities to the Competition Bureau, whereas 26% feel their performance in this area is poor. Conversely, over half (55%, up 16%) of multinational respondents say that the Bureau performs well at enforcing the laws against anti-competitive behaviour, and 14% say that it is poor. Furthermore, nearly half of multinational respondents believe the Bureau performs well at helping Canadian businesses understand how to be compliant with competition and labelling laws (47%) and enabling businesses to develop their own compliance measures (45%).

Exhibit B13: Q42-49: In your opinion, how is the Competition Bureau doing at each of the following? % Very well/Well

Base: All respondents

| Row %  | SMBs    |         | Multinationals |         |
|--|---------|---------|----------------|---------|
|  | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| Enforcing the laws against anti-competitive behaviour  | 36%     | 33%     | 55%            | 39%     |
| Ensuring Canadian businesses can thrive and innovate in the digital marketplace  | 32%     | 33%     | 38%            | 38%     |
| Providing Canadian businesses with Business alerts containing useful information on deceptive marketing practices, misleading advertising and scams    | 31%     | 32%     | 36%            | 37%     |
| Helping Canadian businesses understand how to be compliant with Canada’s competition and labelling laws  | 31%     | 36%     | 47%            | 36%     |
| Enabling businesses to develop their own compliance measures   | 30%     | NA      | 45%            | NA      |
| Educating Canadians on how to recognize anti-competitive behaviours, such as price-fixing and misleading advertising and deceptive marketing practices | 29%     | 32%     | 36%            | 36%     |
| Educating Canadians on how to report suspected anti-competitive activities to the Competition Bureau   | 29%     | 26%     | 31%            | 37%     |
| Addressing the competition issues associated with the digital transformations taking place in the marketplace  | 26%     | 29%     | 40%            | 40%     |
| Sample size  | 407     | 401     | 58             | 117     |

### Impact of the Bureau’s work

Over half (53%) of the SMBs report that none of the Bureau’s activities or publications have had an impact on their behaviour, and 12% are unsure. Among the remaining one-third who have been impacted by an activity or publication, responses are fairly split. Including those who said they have been impacted by “all of them”, the most influential activities or publications are the annual Fraud Prevention Month campaign (13% have been impacted by them), followed by the

*Little Black Book of Scams* (12%), the *Deceptive Marketing Practices Digest* (11%), and the corporate guidance on compliance programs (11%).

Consistent with last wave, three-in-ten (28%) of multinationals claim to have not been influenced by any of the Bureau's activities or publications, while 16% do not know. Including those who said "all of them", the most influential of all the Bureau's activities or publications are the Bureau's competition promotion work with regulators and policymakers (24%), followed by the enforcement guidance documents (24%).

For the SMBs, those who have been impacted by any of the activities or publications are, for each, most likely to report that they took no specific action but are now armed with more information to detect anti-competitive activity. Note that the sample sizes of those who have been impacted by any activity are small, and results should be treated with caution.

In addition to many indicating that they did nothing specific, multinational respondents are also likely to say for each that their company changed their business conduct to be more compliant and/or implemented a Compliance program.

#### **Qualitative insights: Impact of the Bureau's work**

The qualitative results were very consistent with the quantitative findings in that many SMB participants and multinational interviewees did not feel their businesses had been affected nor did they think they would be impacted by the Bureau's cases, activities or publications. Having said that, as mentioned earlier, keeping up to date on news stories about cases that involve the Bureau feels like a prudent thing to do as a businessperson.

"I read the newspapers all the time and this is business information I pay attention to. I need to be aware of what is or is not allowed." – Multinational

"It's important to at least look into why it was blocked [speaking of Rogers' acquisition of Shaw] or even just the business impact directly in terms of buy and sell times and delays." – Multinational

"I have not heard of any of these [list of Bureau activities in Exhibit B14] but was interested in many, particularly enforcement guidance documents. I'm interested to know a lot of this. I would welcome a person to contact us to give us more information." - Multinational

As with the Consumer alerts, there was interest in the Business alerts. When shown examples of consumer and/or business alerts published by the Bureau, SMBs and multinationals demonstrated appreciation for the value and relevance of the information. None doubted the credibility of the information though many did wonder how they would come across them arguing their emails are bombarded already.

"I rely on many professionals – accountants, lawyers, etc. – no one has ever mentioned these to me." – SMB

"The information is pertinent and interesting. I would trust it but how would they get it to me? I get too many emails and I would not log on every day to read news alerts." – SMB

Exhibit B14: Q30: Using the list below, please indicate the ones, if any, that have had an impact on your behaviour or work. Please select all that apply.

Base: All respondents

| Row %  | SMBs    |         | Multinationals |         |
|--|---------|---------|----------------|---------|
|  | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| The annual Fraud Prevention Month campaign   | 10%     | 7%      | 16%            | 9%      |
| The <i>Little Black Book of Scams</i>  | 8%      | 7%      | 7%             | 9%      |
| The Competition Bureau's publication called the <i>Deceptive Marketing Practices Digest</i>  | 8%      | 7%      | 14%            | 8%      |
| (2023-24) The Competition Bureau Corporate guidance on compliance programs and/or compliance-related resources / (2019-20) The Competition Bureau's Corporate Compliance Programs Bulletin and/or compliance materials | 8%      | 4%      | 16%            | 13%     |
| The Competition Bureau's Business alerts   | 7%      | 9%      | 14%            | 14%     |
| The Competition Bureau's competition promotion work with regulators and policymakers, such as market studies and regulatory interventions  | 6%      | 6%      | 19%            | 15%     |
| The Competition Bureau's enforcement guidance documents  | 5%      | 6%      | 19%            | 19%     |
| Updates on the Bureau's major enforcement cases  | 4%      | 4%      | 7%             | 10%     |
| The Competition Bureau's Immunity and Leniency Programs  | 3%      | 3%      | 12%            | 7%      |
| All of them  | 4%      | 2%      | 5%             | 3%      |
| None of them   | 53%     | 46%     | 28%            | 30%     |
| Don't know / Prefer not to answer  | 12%     | 21%     | 16%            | 14%     |
| Sample size  | 407     | 401     | 58             | 117     |

Exhibit B15: Q32: You indicated that each of the following have had an impact on your behaviour or work. For each, please indicate what type of impact it had using the drop-down menu provided. The annual Fraud Prevention Month campaign.

Base: Among those who indicated the publication had an impact on their behaviour

| Row %   | SMBs    |         | Multinationals |         |
|---|---------|---------|----------------|---------|
|   | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| I didn't do anything, but I have more knowledge on anti-competitive activity  | 66%     | 53%     | 25%            | 47%     |
| I filed a complaint with the RCMP or local police   | 9%      | –       | –              | –       |
| My company changed its business conduct to be compliant with Canada's competition and labelling laws  | 5%      | 17%     | 25%            | 47%     |
| I implemented a Compliance program or have enhanced my current program  | 5%      | 11%     | 25%            | 27%     |
| I contacted the Canadian Anti-Fraud Centre  | 4%      | 13%     | –              | 13%     |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 2%      | 4%      | –              | 7%      |
| I applied to the Immunity and Leniency Program  | 2%      | 4%      | 17%            | 7%      |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 1%      | 10%     | 8%             | 20%     |
| I filed a complaint with another agency   | –       | 9%      | –              | 7%      |
| Don't know / Prefer not to answer   | 7%      | 15%     | –              | 13%     |

|             |    |    |    |    |
|-------------|----|----|----|----|
| Sample size | 65 | 39 | 12 | 15 |
|-------------|----|----|----|----|

Exhibit B16: Q33: You indicated that each of the following have had an impact on your behaviour or work. For each, please indicate what type of impact it had using the drop-down menu provided. The *Little Black Book of Scams*.

Base: Among those who indicated the publication had an impact on their behaviour

| Row %   | SMBs    |         | Multinationals |         |
|---|---------|---------|----------------|---------|
|   | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| I didn't do anything, but I have more knowledge on anti-competitive activity  | 43%     | 43%     | –              | 33%     |
| I contacted the Canadian Anti-Fraud Centre  | 13%     | 19%     | –              | –       |
| I implemented a Compliance program or have enhanced my current program  | 12%     | 12%     | 29%            | 33%     |
| My company changed its business conduct to be compliant with Canada's competition and labelling laws  | 10%     | 7%      | 57%            | 20%     |
| I applied to the Immunity and Leniency Program  | 4%      | –       | –              | –       |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 3%      | –       | –              | 7%      |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 2%      | –       | –              | –       |
| I filed a complaint with the RCMP or local police   | –       | –       | 14%            | –       |
| I filed a complaint with another agency   | –       | 17%     | –              | 7%      |
| Don't know / Prefer not to answer   | 14%     | 16%     | –              | 20%     |
| Sample size   | 48      | 45      | 7              | 15      |

Exhibit B17: Q35: You indicated that each of the following have had an impact on your behaviour or work. For each, please indicate what type of impact it had using the drop-down menu provided. The Competition Bureau's publication called the *Deceptive Marketing Practices Digest*.

Base: Among those who indicated the publication had an impact on their behaviour

| Row %   | SMBs    |         | Multinationals |         |
|---|---------|---------|----------------|---------|
|   | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| I didn't do anything, but I have more knowledge on anti-competitive activity  | 41%     | 61%     | 18%            | 46%     |
| I implemented a Compliance program or have enhanced my current program  | 23%     | 10%     | 27%            | 23%     |
| I contacted the Canadian Anti-Fraud Centre  | 5%      | 18%     | 9%             | 31%     |
| My company changed its business conduct to be compliant with Canada's competition and labelling laws  | 4%      | 20%     | 18%            | 8%      |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 4%      | 10%     | –              | 23%     |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 2%      | 5%      | 9%             | 8%      |
| I filed a complaint with the RCMP or local police   | 2%      | –       | 9%             | –       |
| I applied to the Immunity and Leniency Program  | 2%      | –       | –              | 8%      |
| I filed a complaint with another agency   | –       | 8%      | –              | –       |
| Don't know / Prefer not to answer   | 15%     | 18%     | 9%             | 8%      |

|             |    |    |    |    |
|-------------|----|----|----|----|
| Sample size | 53 | 43 | 11 | 13 |
|-------------|----|----|----|----|

Exhibit B18: Q37: You indicated that each of the following have had an impact on your behaviour or work. For each, please indicate what type of impact it had using the drop-down menu provided. (2023-24) The Competition Bureau Corporate guidance on compliance programs and/or compliance-related resources / (2019-20) The Competition Bureau Corporate Compliance Programs Bulletin and/or compliance materials.

Base: Among those who indicated the publication had an impact on their behaviour

| Row %   | SMBs    |         | Multinationals |         |
|---|---------|---------|----------------|---------|
|   | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| I didn't do anything, but I have more knowledge on anti-competitive activity  | 43%     | 36%     | –              | 42%     |
| My company changed its business conduct to be compliant with Canada's competition and labelling laws  | 18%     | 19%     | 67%            | 11%     |
| I filed a complaint with the RCMP or local police   | 10%     |         | –              |         |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 7%      | 14%     | 8%             | 21%     |
| I implemented a Compliance program or have enhanced my current program  | 6%      | 4%      | –              | 26%     |
| I contacted the Canadian Anti-Fraud Centre  | 5%      | 19%     | –              | 21%     |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | –       | 6%      | –              | 11%     |
| I filed a complaint with another agency   | 1%      | 3%      | 8%             | 11%     |
| I applied to the Immunity and Leniency Program  | –       | –       | –              | –       |
| Don't know / Prefer not to answer   | 12%     | 38%     | 17%            | 21%     |
| Sample size   | 56      | 36      | 12             | 19      |

Exhibit B19: Q36: You indicated that each of the following have had an impact on your behaviour or work. For each, please indicate what type of impact it had using the drop-down menu provided. The Competition Bureau's Business alerts.

Base: Among those who indicated the publication had an impact on their behaviour

| Row %   | SMBs    |         | Multinationals |         |
|---|---------|---------|----------------|---------|
|   | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| I didn't do anything, but I have more knowledge on anti-competitive activity  | 50%     | 64%     | 9%             | 45%     |
| I implemented a Compliance program or have enhanced my current program  | 26%     | 6%      | 45%            | 20%     |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 8%      | 2%      | –              | 10%     |
| My company changed its business conduct to be compliant with Canada's competition and labelling laws  | 4%      | 13%     | 36%            | 25%     |
| I filed a complaint with another agency   | 4%      | 3%      | –              |         |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 3%      | 3%      | 9%             | –       |
| I contacted the Canadian Anti-Fraud Centre  | 2%      | 4%      | –              | 5%      |
| I filed a complaint with the RCMP or local police   | –       | 2%      | –              | –       |

|  |    |     |    |     |
|--|----|-----|----|-----|
| I applied to the Immunity and Leniency Program | –  | 1%  | –  | 5%  |
| Don't know / Prefer not to answer              | 2% | 20% | –  | 20% |
| Sample size                                    | 56 | 46  | 11 | 20  |

Exhibit B20: Q34: You indicated that each of the following have had an impact on your behaviour or work. For each, please indicate what type of impact it had using the drop-down menu provided. The Competition Bureau's competition promotion work with regulators and policymakers, such as the market studies and regulatory interventions.

Base: Among those who indicated the publication had an impact on their behaviour

| Row %   | SMBs    |         | Multinationals |         |
|---|---------|---------|----------------|---------|
|   | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| I didn't do anything, but I have more knowledge on anti-competitive activity  | 51%     | 46%     | 7%             | 43%     |
| My company changed its business conduct to be compliant with Canada's competition and labelling laws  | 17%     | 33%     | 43%            | 14%     |
| I implemented a Compliance program or have enhanced my current program  | 14%     | 10%     | 7%             | 19%     |
| I contacted the Canadian Anti-Fraud Centre  | 4%      | 14%     | 14%            | 19%     |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 3%      | 2%      | 7%             | 5%      |
| I filed a complaint with the RCMP or local police   | 3%      | –       | 7%             | 10%     |
| I filed a complaint with another agency   | 1%      | 2%      | 7%             | 10%     |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | –       | 8%      | –              | 14%     |
| I applied to the Immunity and Leniency Program  | –       | 2%      | –              | 10%     |
| Don't know / Prefer not to answer   | 6%      | 17%     | 7%             | 10%     |
| Sample size   | 50      | 49      | 14             | 21      |

Exhibit B21: Q38: You indicated that each of the following have had an impact on your behaviour or work. For each, please indicate what type of impact it had using the drop-down menu provided. The Competition Bureau's enforcement guidance documents.

Base: Among those who indicated the publication had an impact on their behaviour

| Row %   | SMBs    |         | Multinationals |         |
|---|---------|---------|----------------|---------|
|   | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| I didn't do anything, but I have more knowledge on anti-competitive activity  | 52%     | 53%     | 21%            | 42%     |
| My company changed its business conduct to be compliant with Canada's competition and labelling laws  | 17%     | 15%     | 36%            | 12%     |
| I filed a complaint with the RCMP or local police   | 16%     | 5%      | –              | 8%      |
| I implemented a Compliance program or have enhanced my current program  | 7%      | 7%      | 21%            | 27%     |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 4%      | 2%      | 7%             | 4%      |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 3%      | 7%      | –              | 15%     |
| I contacted the Canadian Anti-Fraud Centre  | 1%      | 6%      | 7%             | 8%      |
| I filed a complaint with another agency   | –       | –       | –              | –       |

|  |    |     |    |     |
|--|----|-----|----|-----|
| I applied to the Immunity and Leniency Program | –  | 3%  | –  | 8%  |
| Don't know / Prefer not to answer              | –  | 19% | 7% | 19% |
| Sample size                                    | 50 | 49  | 14 | 26  |

Exhibit B22: Q31: You indicated that each of the following have had an impact on your behaviour or work. For each, please indicate what type of impact it had using the drop-down menu provided. Updates on the Bureau's major enforcement cases.

Base: Among those who indicated the publication had an impact on their behaviour

| Row %   | SMBs    |         | Multinationals |         |
|---|---------|---------|----------------|---------|
|   | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| I didn't do anything, but I have more knowledge on anti-competitive activity  | 47%     | 59%     | 29%            | 56%     |
| I implemented a Compliance program or have enhanced my current program  | 16%     | 3%      | 14%            | 19%     |
| My company changed its business conduct to be compliant with Canada's competition and labelling laws  | 12%     | 12%     | 43%            | 6%      |
| I filed a complaint with another agency   | 10%     | 13%     | –              | –       |
| I contacted the Canadian Anti-Fraud Centre  | 8%      | 5%      | 14%            | –       |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 3%      | 10%     | –              | 13%     |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | –       | 5%      | –              | –       |
| I filed a complaint with the RCMP or local police   | –       | 3%      | –              | –       |
| I applied to the Immunity and Leniency Program  | –       | –       | –              | 6%      |
| Don't know / Prefer not to answer   | 4%      | 18%     | –              | 13%     |
| Sample size   | 43      | 42      | 7              | 16      |

Exhibit B23: Q39: You indicated that each of the following have had an impact on your behaviour or work. For each, please indicate what type of impact it had using the drop-down menu provided. The Competition Bureau's Immunity and Leniency Programs.

Base: Among those who indicated the publication had an impact on their behaviour

| Row %   | SMBs    |         | Multinationals |         |
|---|---------|---------|----------------|---------|
|   | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| My company changed its business conduct to be compliant with Canada's competition and labelling laws  | 42%     | 24%     | 50%            | 17%     |
| I didn't do anything, but I have more knowledge on anti-competitive activity  | 37%     | 35%     | 10%            | 25%     |
| I implemented a Compliance program or have enhanced my current program  | 11%     | 7%      | 20%            | 17%     |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 4%      | 18%     | –              | 33%     |
| I contacted the Canadian Anti-Fraud Centre  | 3%      | 22%     | –              | 42%     |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 1%      | –       | –              | –       |
| I filed a complaint with the RCMP or local police   | 1%      | 17%     | 20%            | 8%      |
| I filed a complaint with another agency   | –       | –       | –              | –       |
| I applied to the Immunity and Leniency Program  | –       | –       | –              | –       |

|                                   |    |     |    |     |
|-----------------------------------|----|-----|----|-----|
| Don't know / Prefer not to answer | –  | 25% | –  | 17% |
| Sample size                       | 33 | 25  | 10 | 12  |

Seven-in-ten SMB respondents say that they agree that they would trust information provided by the Bureau (71%) and that the Bureau's work is beneficial to the economy (68%). Compared to the previous wave, more SMB respondents agree that they are aware of the requirements needed to submit a Merger Notification (26% vs. 18%), and fewer agree that they are interested in hearing, reading or seeing more from the Bureau (56% vs. 65%).

- SMB respondents with 100 to 499 employees are more likely to agree with several of the statements presented than respondents whose businesses employ fewer people. For example, 84% agree the Bureau's work is beneficial to the economy, compared to 65% of businesses with 1 to 4 employees and 70% of businesses with 5 to 99 employees.
- For-profit SMBs are more likely than not-for-profits to be aware of the requirements needed to submit a Merger Notification (30% vs. 16%).

Strong majorities of multinational respondents agree that the company they work for is compliant (79%), that the Bureau's work is beneficial to the economy (79%), that they would trust information provided by the Bureau (74%), and that they know how to find out whether the company they work for is compliant (71%). Compared to the previous wave, more multinationals agree with all but one of the statements presented (that is, similar proportions this wave agree that they are aware of the requirements needed to submit a Merger Notification).

Exhibit B24: Q56-64: To what extent do you agree or disagree with the following statements? % Agree displayed.

Base: All respondents

| Row %  | SMBs    |         | Multinationals |         |
|--|---------|---------|----------------|---------|
|  | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| I am confident the company I work for is compliant with competition and labelling laws                 | 73%     | 68%     | 79%            | 68%     |
| I would trust information provided by the Competition Bureau   | 71%     | 73%     | 74%            | 69%     |
| I believe the Competition Bureau's work is beneficial to the economy                                   | 68%     | 71%     | 79%            | 68%     |
| I could recognize anti-competitive behaviours  | 60%     | NA      | 67%            | NA      |
| I am interested in hearing, reading or seeing more from the Competition Bureau                         | 56%     | 65%     | 67%            | 57%     |
| I had heard of activities the Competition Bureau does, but I was not aware they were involved          | 42%     | 48%     | 55%            | 46%     |
| I know how to find out whether the company I work for is compliant with competition and labelling laws | 41%     | 36%     | 71%            | 47%     |
| I believe the Competition Bureau's enforcement and labelling law guidelines are clear                  | 40%     | 36%     | 62%            | 41%     |
| I am aware of the requirements needed to submit a Merger Notification to the Competition Bureau        | 26%     | 18%     | 34%            | 32%     |
| Sample size  | 407     | 401     | 58             | 117     |



## Contact with the Bureau

Very few SMBs (3%) and multinationals (9%) have contacted the Bureau in the last 12 months. More have contacted the Bureau at some point in the past (9% and 19%, respectively). Similar proportions have ever had in-person contact with the Bureau through avenues such as trades shows, conferences or outreach event (9% of SMBs and 28% of multinationals).

- Respondents from SMBs with 100 to 499 employees are more likely to have had in-person contact with the Bureau (27%), than businesses with 1 to 4 employees (5%) and 5 to 99 employees (13%).

Among those who have contacted the Bureau, most did so by calling the Federal Contracting Fraud Tip Line (32% among SMBs and 44% among multinationals), by calling the information centre (29% among SMBs and 38% among multinationals) and/or by filing an online complaint (24% among SMBs and 44% among multinationals). One-fifth of SMB (21%) and multinational (19%) respondents contacted the Bureau through their lawyer. Half (49%) of SMBs are satisfied with their interactions with the Bureau. Three-quarters (75%) of multinationals say they are satisfied.

### Exhibit B25: Q50: Have you ever contacted the Competition Bureau?

Base: All respondents

| Column %                           | SMBs    |         | Multinationals |         |
|------------------------------------|---------|---------|----------------|---------|
|                                    | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| Yes, in the past 12 months         | 3%      | 2%      | 9%             | 5%      |
| Yes, but not in the past 12 months | 9%      | 6%      | 19%            | 11%     |
| No                                 | 84%     | 91%     | 67%            | 81%     |
| Don't know / Prefer not to answer  | 4%      | 1%      | 5%             | 3%      |
| Sample size                        | 407     | 401     | 58             | 117     |

### Exhibit B26: Q55: Have you ever had any in-person contact with the Competition Bureau, such as at a tradeshow, conference, or outreach event?

| Column %  | SMBs    | Multinationals |
|---|---------|----------------|
|   | 2023-24 | 2023-24        |
| Yes, recently (in the past 12 months)             | 3%      | 12%            |
| Yes, but not recently (not in the past 12 months) | 6%      | 16%            |
| No  | 87%     | 71%            |
| Don't know / Prefer not to answer                 | 4%      | 2%             |
| Sample size                                       | 407     | 58             |

### Exhibit B27: Q51: How did you contact the Competition Bureau? [Accept all].

Base: Among those who have contacted the Competition Bureau (Q50)

| Column %  | SMBs    |         | Multinationals |         |
|---|---------|---------|----------------|---------|
|   | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| I called the Federal Contracting Fraud Tip Line   | 32%     | 29%     | 44%            | 32%     |
| I called their Information Centre                 | 29%     | 33%     | 38%            | 37%     |
| I sent them an online complaint                   | 24%     | 45%     | 44%            | 42%     |
| My lawyer contacted the Competition Bureau for me | 21%     | 9%      | 19%            | 21%     |
| Immunity and Leniency applicant                   | 10%     | 6%      | –              | 11%     |

|  |     |     |    |    |
|--|-----|-----|----|----|
| Through social media (Facebook, X (formerly Twitter, Reddit or LinkedIn) | 17% | 9%  | 6% | 5% |
| Other  | –   | –   | –  | –  |
| Don't know / Prefer not to answer  | –   | 10% | –  | –  |
| Sample size  | 47  | 40  | 16 | 19 |

Exhibit B28: Q52: Why did you contact the Competition Bureau? [Accept all]  
Base: Among those who have contacted the Competition Bureau (Q50)

| Column %   | SMBs    |         | Multinationals |         |
|--|---------|---------|----------------|---------|
|  | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| For information on how to comply with labelling laws                         | 34%     | 32%     | 31%            | 42%     |
| For information on how to comply with the <i>Competition Act</i>             | 31%     | 12%     | 38%            | 21%     |
| For information on CA Identification Numbers                                 | 23%     | 15%     | 25%            | 26%     |
| To file a complaint  | 16%     | 28%     | 6%             | 21%     |
| For information on merger guidelines   | 14%     | 16%     | 31%            | 37%     |
| For information on or to report a scam or other deceptive marketing practice | 6%      | 23%     | 13%            | 16%     |
| To request a compliance presentation   | 5%      | 10%     | 13%            | –       |
| To request a written opinion   | 4%      | 4%      | 6%             | –       |
| For information on their Immunity and Leniency Programs                      | 3%      | –       | 6%             | 5%      |
| For information on an investigation  | 3%      | 15%     | 6%             | –       |
| To submit a merger notification  | 2%      | 4%      | 6%             | 5%      |
| Other  | –       | 2%      | –              | –       |
| Don't know / Prefer not to answer  | 10%     | 3%      | –              | –       |
| Sample size  | 47      | 40      | 16             | 19      |

Exhibit B29: Q53: Overall, how satisfied have you been with the contact that you have had with the Competition Bureau?

Base: Among those who have contacted the Competition Bureau (Q50)

| Column %                           | SMBs    |         | Multinationals |         |
|------------------------------------|---------|---------|----------------|---------|
|                                    | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| Very satisfied                     | 12%     | 20%     | 38%            | 11%     |
| Somewhat satisfied                 | 37%     | 21%     | 38%            | 42%     |
| Neither satisfied nor dissatisfied | 20%     | 28%     | 6%             | 21%     |
| Somewhat dissatisfied              | 26%     | 28%     | 13%            | 21%     |
| Very dissatisfied                  | 1%      | 2%      | 6%             | 5%      |
| Don't know / Prefer not to answer  | 4%      | 2%      | –              | –       |
| Sample size                        | 47      | 40      | 16             | 19      |

If they were to receive information, three-in-five SMBs (59%, up 12% since last wave) and multinationals (59%) would like to receive it by email. The Bureau's website is the second most popular method of communication, as indicated by 30% (up 13%) of SMBs and 34% of multinationals. One-quarter (25%) of SMBs would prefer to receive information from the Bureau through social media. One-fifth of multinationals prefer regular mail (21%), social media (19%) and/or telephone (19%).

**Qualitative insights: Information needs**

In terms of information needs, many volunteered interest in learning more about the specific activities/cases the Bureau is investigating as well as the status of investigations and/or outcomes.

“It would be nice to know if they’re accomplishing anything.” – SMB

SMBs and multinationals also requested information about how the case impacts their businesses, what they could do to get involved, or where they could go to read/learn more about the cases. Some multinationals also indicated needing to be informed of changes to guidance documents in order to help them avoid unwittingly being non-compliant.

“It’s simple. We don’t know [the Bureau] even exists. The Competition Bureau needs to talk about everything it does.” – SMB

“Compliance-related information would be very useful. We are a smaller company and compete with a lot of larger companies who create barriers of entry for us.” – Multinational

In terms of preferences for receiving information, most businesses were reluctant to suggest email, arguing their inboxes are bombarded. Some suggested social media as an alternative and offered that they use LinkedIn, Instagram, Facebook, X, and YouTube.

“I don’t personally want to receive more info, but I do want to have access to more info. At the very least, let me know information is available. Just a reminder, ‘By the way, there is important information available.’” – Multinational

Exhibit B30: Q66: What method of communication would you prefer if you were to receive information about and from the Competition Bureau? [Accept all]

Base: All respondents

| Column %   | SMBs    |         | Multinationals |         |
|--|---------|---------|----------------|---------|
|  | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| Email  | 59%     | 47%     | 59%            | 54%     |
| Competition Bureau website                               | 30%     | 17%     | 34%            | 30%     |
| Social media (Facebook, X (Twitter), Reddit or LinkedIn) | 25%     | 14%     | 19%            | 17%     |
| News media   | 18%     | 15%     | 17%            | 20%     |
| Regular mail   | 10%     | 14%     | 21%            | 15%     |
| Telephone  | 5%      | 4%      | 19%            | 11%     |
| In-person  | 3%      | 3%      | 3%             | 5%      |
| I am not interested in receiving information             | 11%     | 26%     | 7%             | 13%     |
| Other  | –       | –       | 3%             | –       |
| Don’t know / Prefer not to answer                        | –       | 3%      | 2%             | 5%      |
| Sample size  | 407     | 401     | 58             | 117     |

**The Bureau’s future work**

Equal proportions of SMBs and multinationals would like to see the Bureau prioritize health care and pharmaceuticals (25% and 22%, respectively), banking and finance (25% and 22%, respectively), and telecommunications (24% and 22%, respectively). While still an important

priority among these audiences, fewer SMBs (down 17%) and multinationals (down 10%) this wave say that telecommunications should be the focus of the Bureau. Topping the list for multinationals, 28% believe that construction should be the Bureau's focus.

Exhibit B31: Q67: The Competition Bureau is an independent federal law enforcement agency that ensures Canadian businesses and consumers prosper in a competitive and innovative marketplace. It investigates anti-competitive activities, protects consumers and promotes competitive markets. Now that you know more about the Competition Bureau, in which sectors of the economy should the Bureau focus its work? [Accept up to three]

Base: All respondents

| Column %   | SMBs    |         | Multinationals |         |
|--|---------|---------|----------------|---------|
|  | 2023-24 | 2019-20 | 2023-24        | 2019-20 |
| Health Care and Pharmaceuticals  | 25%     | 25%     | 22%            | 25%     |
| Banking and Finance  | 25%     | 25%     | 22%            | 20%     |
| Telecommunications   | 24%     | 41%     | 22%            | 32%     |
| Retail Trade (e.g. grocery stores, department stores and automobile dealers)     | 21%     | 20%     | 9%             | 11%     |
| Accommodation and Food Services (e.g. hotels and restaurants)                    | 18%     | 9%      | 19%            | 5%      |
| Construction   | 17%     | 8%      | 28%            | 15%     |
| E-Commerce Platforms (e.g. Amazon, Shopify, Facebook Marketplace and eBay)       | 16%     | 24%     | 16%            | 26%     |
| Utilities (e.g. electric power generation and natural gas distribution)          | 14%     | 18%     | 9%             | 12%     |
| Retail Gas (e.g. gas stations)   | 13%     | 21%     | 9%             | 11%     |
| Waste Management Services (Waste collection and treatment)                       | 12%     | 3%      | 16%            | 3%      |
| Agriculture, Forestry, Fishing and Hunting                                       | 9%      | 3%      | 14%            | 2%      |
| Social Media Platforms (e.g. Facebook, Twitter, and Instagram)                   | 9%      | 21%     | 14%            | 17%     |
| Transportation (e.g. air and rail transportation, and municipal transit systems) | 9%      | 12%     | 2%             | 11%     |
| Educational Services   | 8%      | 4%      | 12%            | 4%      |
| Arts, Entertainment and Recreation   | 7%      | 4%      | 10%            | 2%      |
| Manufacturing  | 7%      | 9%      | 3%             | 23%     |
| Real Estate and Rental and Leasing   | 7%      | 19%     | 9%             | 21%     |
| (2023-24) All sectors / (2019-20) All of the above                               | 2%      | 1%      | –              | –       |
| Other  | 2%      | –       | 2%             | –       |
| Don't know / Prefer not to answer  | 8%      | –       | 5%             | –       |
| Sample size  | 407     | 401     | 58             | 117     |

### Proposed changes to the *Competition Act*

Few (2%) SMBs, prior to this survey, clearly recalled having read, seen or heard about changes to the *Competition Act*, and seven-in-ten (72%) are confident they had not. More multinational respondents had recall, either clear (16%) or vague (33%).

- Over half (53%) of SMBs with 100 to 499 employees say that they recall changes being made to the *Competition Act*, compared to 13% of those with 1 to 4 and 29% of those with 5 to 99 employees.

Exhibit B32: Q68: Prior to taking this survey, had you read, seen or heard anything about changes to the *Competition Act* introduced in Parliament in the fall of 2023?

Base: All respondents

| Column %  | SMBs    | Multinationals |
|---|---------|----------------|
|   | 2023-24 | 2023-24        |
| Do not recall reading, seeing or hearing something  | 72%     | 45%            |
| Vaguely recall reading, seeing or hearing something | 19%     | 33%            |
| Clearly recall reading, seeing or hearing something | 2%      | 16%            |
| Don't know / Prefer not to answer                   | 7%      | 7%             |
| Sample size   | 407     | 58             |

Respondents were provided with the following description of the amendments:

On December 15, 2023, important amendments to the *Competition Act* became law, strengthening the Competition Bureau’s ability to promote competition and to prevent anti-competitive mergers and conduct.

Notably, these amendments:

- Create a framework for market studies that allows for collecting necessary information;
- Remove the efficiency defence in merger reviews and business collaborations;
- Simplify the legal test for abuse of dominance and increase the maximum penalties available; and,
- Expand the scope of the law to restrict more anti-competitive business collaborations.

Following this description, respondents were asked to assess the level of impact these changes would have on the range of choices available to consumers and the affordability of items (like groceries). A plurality of respondents feels these changes would have a somewhat positive impact on range of choice (47% among SMBs and 41% among multinationals) and affordability (40% among SMBs and 38% among multinationals). Furthermore, one-fifth of SMBs (22%) and multinationals (21%) feel these changes would have no impact on range of choice, and one-quarter say there would be no impact on affordability (25% among SMBs and 24% of multinationals). Smaller proportions would suggest these changes will have a negative impact or a ‘very positive’ impact.

Exhibit B33: Q69: What impact, if any, do you think these changes will have in each of the following areas? The range of choices available to consumers.

Base: All respondents

| Column %                          | SMBs    | Multinationals |
|-----------------------------------|---------|----------------|
|                                   | 2023-24 | 2023-24        |
| Very positive impact              | 11%     | 12%            |
| Somewhat positive impact          | 47%     | 41%            |
| No impact                         | 22%     | 21%            |
| Somewhat negative impact          | 6%      | 5%             |
| Very negative impact              | 3%      | 3%             |
| Don't know / Prefer not to answer | 12%     | 17%            |
| Sample size                       | 407     | 58             |

Exhibit B34: Q70: What impact, if any, do you think these changes will have in each of the following areas? The affordability of items such as groceries.

Base: All respondents

| Column %                          | SMBs    | Multinationals |
|-----------------------------------|---------|----------------|
|                                   | 2023-24 | 2023-24        |
| Very positive impact              | 11%     | 17%            |
| Somewhat positive impact          | 40%     | 38%            |
| No impact                         | 25%     | 24%            |
| Somewhat negative impact          | 5%      | 3%             |
| Very negative impact              | 5%      | –              |
| Don't know / Prefer not to answer | 14%     | 17%            |
| Sample size                       | 407     | 58             |

### C. Regulators and policymakers

The regulators and policymakers section is divided into the following sub-sections:

1. the first explains overall awareness and general perceptions of the Bureau and the four Acts it enforces;
2. the second deals with awareness and perceptions of the Bureau’s activities and performance;
3. the third focuses on the impact of the Bureau’s work;
4. the fourth summarizes contact with the Bureau, including preferred methods of communication;
5. the fifth outlines views regarding where the Bureau should focus future efforts;
6. the sixth explores views related to proposed changes to the *Competition Act*;
7. and the seventh (a new part) explores views related to proposed changes to the *Competition Act*.

As mentioned at the outset of the report, it is important to note with respect to the survey results among regulators and policymakers, and 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.

## Overall awareness and general perceptions of the Bureau

Overall awareness of the Bureau seems to have increased this wave over last. Nearly two-thirds (62%, up 6%) of regulators and policymakers can identify the Competition Bureau as the organization responsible for federal labelling and competition laws. A little over half (53%, up 25%) say they are familiar with the Bureau (4 or 5 on a 5-point scale).

The vast majority (86%) agree that having an organization that enforces competition and labelling laws and advocates for competition in the Canadian economy is important. For information about competition laws or labelling laws, this year, most say they would consult the Bureau (67%, up 25%) or a Government of Canada website (67%, up 11%).

Nearly half (48%) clearly recall hearing or seeing something about the Bureau, while 33% vaguely recall hearing something.

A little over half (52%) say that the description of the Bureau provided<sup>1</sup> in the survey adds to their understanding of what the Bureau is. About a quarter (28%) claim they already had the same understanding of the Bureau. Only 10%, a decrease of 37%, did not know the Competition Bureau before doing this survey.

### **Qualitative insights: Awareness of the Bureau**

Not surprisingly, regulators and policymakers, more than any other audience, were generally informed of the Bureau's work. The vast majority were able to name the Bureau as the organization or agency dedicated to addressing deceptive marketing practices and other anti-competitive conduct, though the majority describe themselves as somewhat familiar with the organization.

Unaided, they were able to describe some of the Bureau's work, which included: ensure fair competition in the marketplace, police the market, to set laws and enforce existing laws, avoid monopolies/dominance, and investigate fraudulent behaviour such as price fixing and deceptive marketing practices. In terms of what they had seen, read or heard recently, mentions included cases such as: the bread price-fixing investigation, the Rogers takeover of Shaw, the HSBC RBC merger, and other mergers (companies not identified).

"Their role is to help avoid monopolies and that competition is possible in the marketplace. They also investigate fraudulent behaviour."

Overall, most described the Bureau's work as essential, and the Bureau is seen as performing its role effectively.

Exhibit C1: Q5: Can you name the organization responsible for enforcing federal competition laws and labelling laws (except as it relates to food products)?

Base: All respondents

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<sup>1</sup> Respondents were provided with the following description of the Bureau. The Competition Bureau is an independent federal law enforcement agency that investigates anti-competitive activities, protects consumers and promotes competitive markets. It is responsible for the administration and enforcement of the *Competition Act*, the *Consumer Packaging and Labelling Act* (except as it relates to food), the *Textile Labelling Act* and the *Precious Metals Marking Act*.

| Column %  | 2023-24 | 2019-20 |
|---|---------|---------|
| Competition Bureau / Competition Bureau of Canada | 62%     | 56%     |
| Canadian Food Inspection Agency (CFIA)            | 10%     | 6%      |
| Food and Drug Administration (FDA)                | –       | 2%      |
| Health Canada                                     | –       | 2%      |
| Other   | 10%     | 8%      |
| None / Nothing                                    | 14%     | 24%     |
| Don't know / Prefer not to answer                 | 5%      | 2%      |
| Sample size                                       | 21      | 50      |

Exhibit C2: Q23: How familiar are you with the Competition Bureau? Please use a scale from 1 to 5 where 1 means “Not at all familiar” and 5 means “Very familiar.”

Base: All respondents

| Column %                          | 2023-24 | 2019-20 |
|-----------------------------------|---------|---------|
| 1-Not at all familiar             | 5%      | 20%     |
| 2                                 | 29%     | 24%     |
| 3                                 | 14%     | 28%     |
| 4                                 | 24%     | 12%     |
| 5-Very familiar                   | 29%     | 16%     |
| Don't know / Prefer not to answer | –       | –       |
| Sample size                       | 21      | 50      |

Exhibit C3: Q12: How important is it 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? Please use a scale from 1 to 5 where 1 means “Not at all important” and 5 means “Very important”.

Base: All respondents

| Column %                          | 2023-24 | 2019-20 |
|-----------------------------------|---------|---------|
| 1-Not at all important            | –       | –       |
| 2                                 | –       | –       |
| 3                                 | 10%     | 6%      |
| 4                                 | 24%     | 18%     |
| 5-Very important                  | 62%     | 72%     |
| Don't know / Prefer not to answer | 5%      | 4%      |
| Sample size                       | 21      | 50      |

Exhibit C4: Q22: If you need general information about competition laws or labelling laws, who or what do you consult? Please select all that apply.

Base: All respondents

| Row %  | 2023-24 | 2019-20 |
|--|---------|---------|
| The Competition Bureau   | 67%     | 42%     |
| A Government of Canada website                                     | 67%     | 56%     |
| Innovation, Science and Economic Development Canada (ISED)         | 48%     | 16%     |
| The Internet   | 48%     | 34%     |
| Department of Justice or the justice department within my province | 24%     | 12%     |
| Chambers of Commerce / Trade associations                          | 19%     | –       |
| Other  | 24%     | 2%      |
| Don't know / Prefer not to answer                                  | –       | 8%      |
| Sample size  | 21      | 50      |



Exhibit C5: Q24: The Competition Bureau is an independent federal law enforcement agency that investigates anti-competitive activities, protects consumers and competitive markets. It is responsible for the administration and enforcement of the *Competition Act*, the *Consumer Packaging and Labelling Act* (except as it relates to food), the *Textile Labelling Act* and the *Precious Metals Marking Act*. Which statement best reflects your knowledge of the Competition Bureau before completing this survey?

Base: All respondents

| Column %   | 2023-24 | 2019-20 |
|--|---------|---------|
| I did not know about the Competition Bureau before doing this survey | 10%     | 47%     |
| This adds to what I already know about the Competition Bureau        | 52%     | 31%     |
| This was already my understanding of the Competition Bureau          | 38%     | 28%     |
| Don't know / Prefer not to answer                                    | –       | 6%      |
| Sample size  | 21      | 50      |

Exhibit C6: Q25: Over the past year, how clearly do you recall seeing or hearing anything about the Competition Bureau?

Base: All respondents

| Column %                                   | 2023-24 | 2019-20 |
|--|---------|---------|
| Do not recall seeing or hearing anything   | 19%     | 38%     |
| Vaguely recall seeing or hearing something | 33%     | 22%     |
| Clearly recall seeing or hearing something | 48%     | 40%     |
| Don't know / Prefer not to answer          | –       | –       |
| Sample size                                | 21      | 50      |

Awareness of most activities that are subject to Canadian laws increased wave over wave. A little over half of regulators and policymakers are aware of price-fixing, bid-rigging and collusion (57%), misleading advertising and deceptive marketing practices (57%), and abuse of dominance (monopolization) (57%). Just under half are familiar with mergers and acquisitions (43%). One-quarter are aware of consumer packaging and textile labelling and marking of precious metals (24%, down 18% since the previous wave). Close to one-in-five are aware of wage fixing and no-poaching agreements (19%).

Exhibit C7: Q6-11: Below is a list of activities that are subject to Canadian laws. Please indicate how aware you are of each activity. Please use a scale from 1 to 5 where 1 means “Not at all aware” and 5 means “Very aware”? % Aware displayed.

Base: All respondents

| Row %  | 2023-24 | 2019-20 |
|--|---------|---------|
| Price-fixing, bid-rigging, collusion                                     | 57%     | 50%     |
| Misleading advertising and deceptive marketing practices                 | 57%     | 46%     |
| Abuse of dominance (monopolization)                                      | 57%     | 38%     |
| Mergers and acquisitions   | 43%     | 38%     |
| Consumer packaging and textile labelling, and marking of precious metals | 24%     | 42%     |
| Wage fixing and no-poaching agreements                                   | 19%     | NA      |
| Sample size  | 21      | 50      |

Half (67%) of regulators and policymakers surveyed are familiar with the *Competition Act*. Fewer are familiar with the *Consumer Packaging and Labelling Act* (38%). The *Textile and Labelling Act* (29%) and the *Precious Metals Marking Act* (10%) are less known.

Nearly nine-in-ten (86%, up 16%) consider competition issues and principles in their work when developing policy or regulation. The *Competition Act* is the law to which most refer (76%), followed by the *Consumer Packaging and Labelling Act* (29%). Fewer refer to the *Textile and Labelling Act* (10%), while none refer to the *Precious Metals Marking Act* (down 6% from last wave).

**Qualitative insights: Knowledge of the Acts**

As with the other audiences, awareness, knowledge, and understanding of the four Acts the Bureau enforces was generally low. In fact, only one Act, the *Competition Act*, was considered very relevant for two regulators and policymakers; the other three Acts were deemed of varying relevance depending on the interviewees’ industry/sector. Beyond awareness of the Acts themselves, the majority were unaware that the Bureau is responsible for enforcing each of these Acts.

Given this lack of awareness and knowledge, it is perhaps not surprising that the majority were not confident that they know all they need to know about these Acts though only a few have sought information related to one of these Acts for the work they do. Should more information be needed, interviewees were not worried about being able to access the necessary information whether by searching online or reaching out to the Bureau.

“Yes. Google would find a way and my access to the Ministry would be helpful.”

Exhibit C8: Q13-16: Please indicate how familiar you are with each of the following laws. Please use a scale from 1 to 5 where 1 means "Not at all familiar" and 5 means "Very familiar." % Familiar displayed.

Base: All respondents

| Row %  | 2023-24 | 2019-20 |
|--|---------|---------|
| A federal law called the <i>Competition Act</i> that governs most business conduct with the purpose of maintaining and encouraging competition in Canada; promoting the efficiency and adaptability of the Canadian economy; and ensuring utilities that businesses have a fair opportunity to participate in the Canadian economy | 67%     | 54%     |
| A federal law called the <i>Consumer Packaging and Labelling Act</i> that requires that prepackaged consumer products (excluding food) have accurate and meaningful labelling information  | 38%     | 44%     |
| A federal law called the <i>Textile Labelling Act</i> that requires that textile articles, such as clothing, have accurate and meaningful labelling information  | 29%     | 28%     |
| A federal law called the <i>Precious Metals Marking Act</i> that covers the requirements for the marking of precious metals such as gold and silver  | 10%     | 10%     |
| Sample size  | 21      | 50      |

Exhibit C9: Q17: Do you consider competition issues and principles when developing policy or regulation?

Base: All respondents

| Column %           | 2023-24 | 2019-20 |
|--------------------|---------|---------|
| Yes, often         | 62%     | 42%     |
| Yes, but not often | 24%     | 28%     |
| No                 | 14%     | 26%     |

|                                   |    |    |
|-----------------------------------|----|----|
| Don't know / Prefer not to answer | –  | 4% |
| Sample size                       | 21 | 50 |

Exhibit C10: Q18-21: Do you refer to any of the following laws to inform policy development or regulation development and enforcement within your organization? % Yes displayed.

Base: All respondents

| Row %  | 2023-24 | 2019-20 |
|--|---------|---------|
| A federal law called the <i>Competition Act</i> that governs most business conduct with the purpose of maintaining and encouraging competition in Canada; promoting the efficacy and adaptability of the Canadian economy; and ensuring that businesses have a fair opportunity to participate in the Canadian economy | 76%     | 46%     |
| A federal law called the <i>Consumer Packaging and Labelling Act</i> that requires that prepackaged consumer products (excluding food) have accurate and meaningful labelling information  | 29%     | 20%     |
| A federal law called the <i>Textile Labelling Act</i> that requires that textile articles, such as clothing, have accurate and meaningful labelling information  | 10%     | 14%     |
| A federal law called the <i>Precious Metals Marking Act</i> that covers the requirements for the marking of precious metals such as gold and silver  | –       | 6%      |
| Sample size  | 21      | 50      |

### Awareness and perceptions of the Bureau's activities and performance

When it comes to specific cases, the most widely recalled are the attempt to seek a full block of Rogers' proposed acquisition of Shaw (90%) and the bread price-fixing investigation (86%). Slightly less than half recall hearing of the Bureau's Gatineau bid-rigging case (48%). The least often recalled (one-fifth or less) include the Bureau's actions to stop unsubstantiated weight loss claims, the Bureau's concerns over marketing claims related to the Dufresne Group Inc., and the investigation that led to criminal charges against Mr. Terry Croteau (all 14%). No regulators or policymakers were aware of the Bureau's challenge of Secure Energy Services' acquisition of Tervita Corporation or the review of the merger between admixture system firms Sika AG and MBCC Group.

In terms of the activities and publications, the Bureau's market studies (such as the retail grocery market study), and submissions and regulatory interventions (such as the submission to the Government of Canada's consultation on competition policy) had the highest recall with 38% and 37%, respectively (including those who selected "all of them"). One-quarter recall the annual Fraud Prevention Month campaign and the online complaint form; both at 24%.

Where interest is concerned, updates on the Bureau's major enforcement cases, the *Little Black Book of Scams*, and the market studies are the activities and publications of greatest interest (all 48%; including those who expressed interest in "all of them"). At approximately two-in-five, the competition promotion work and Assessment Toolkit are of interest to 43% of regulators and policymakers, followed by advice on competition-related issues (38%). Nearly one-third are interested in the *Deceptive Marketing Practices Digest* (34%), the Fraud Prevention Month campaign (34%), and the report on competitive intensity from 2000-2020 (29%).

**Qualitative insights: Awareness and interest in the Bureau’s cases, activities and publications**

Consistent with the quantitative findings, all of the interviewees recalled the bread price-fixing investigation and the attempt to seek a full-block of Rogers’ proposed acquisition of Shaw and were aware of the Bureau’s involvement in those cases. The majority were also aware of the Gatineau bid-rigging case, though awareness of the Bureau’s role in that case was lower. The only other two cases that interviewees were aware of included the deceptive marketing investigation of the Dufresne Group Inc. and the Bureau’s actions to stop unsubstantiated weight loss claims, though in both cases awareness of the Bureau’s role in both was nil.

Awareness of Bureau activities and publications, including their role in each, were much more highly correlated in that if an interviewee was aware of an activity or publication, they were also aware of the Bureau’s role in said activity or publication. The activity or publication for which the majority were aware was the Deceptive Marketing Practices Digest. This was followed by the Fraud Prevention Month campaign and the Consumer and Business alerts. Some were aware of the Little Black Book of Scams and the Bureau’s Compliance Hub or compliance presentations.

Exhibit C11: Q26: Below is a list of cases pursued by the Competition Bureau. For each of the following, please indicate if you recall hearing about it. Please select all that apply.

Base: All respondents

| Row %  | 2023-24 |
|--|---------|
| The Competition Bureau’s attempt to seek a full-block of Rogers’ proposed acquisition of Shaw  | 90%     |
| The bread price-fixing investigation, where there is an ongoing investigation into alleged price-fixing between producers to raise wholesale bread prices, as well as alleged price-fixing between grocery stores to raise retail prices. Canada Bread Company Limited, a bread producer and distributor, was fined \$50 million after pleading guilty for its role in a criminal price-fixing arrangement   | 86%     |
| The Competition Bureau’s Gatineau bid-rigging case, where an engineering executive was accused in a bid-rigging scheme that bilked the City of Gatineau out of an estimated \$1.8 million  | 48%     |
| The Competition Bureau’s actions to stop unsubstantiated weight loss claims  | 14%     |
| The Dufresne Group Inc. (TDG) and its affiliates agreed to pay \$3.25M to settle the Competition Bureau’s concerns over marketing claims. The investigation found that TDG offered certain products at inflated regular prices and then advertised them at big discounts, suggesting significant savings. In addition, they made marketing claims to consumers using sale end dates or countdown timers that gave false or misleading impression that deals on certain items would no longer be available after a certain time, when this was not the case | 14%     |
| The Competition Bureau investigation that led to multiple criminal charges against Mr. Terry Croteau of Ontario alleging the use of deceptive telemarketing and false or misleading statements to get Canadian businesses to sign up for listings in online directories  | 14%     |
| The Competition Bureau’s challenge of Secure Energy Services’ acquisition of Tervita Corporation   | –       |
| The Competition Bureau’s review of the merger between admixture system firms Sika AG and MBCC Group  | –       |
| All of them  | –       |
| None of them   | –       |

|                                   |    |
|-----------------------------------|----|
| Don't know / Prefer not to answer | –  |
| Sample size                       | 21 |

Exhibit C12: Q27: Below is a list of activities and publications by the Competition Bureau. For each of the following, please indicate if you recall hearing about it. Please select all that apply.  
Base: All respondents

| Row %   | 2023-24 |
|---|---------|
| The Competition Bureau's market studies, such as the retail grocery market study  | 33%     |
| The Competition Bureau's submissions and regulatory interventions, such as the submission to the Government of Canada's consultation on competition policy  | 29%     |
| The annual Fraud Prevention Month campaign, including the Little Black Book of Scams  | 19%     |
| The Competition Bureau's online complaint form where you can notify the Competition Bureau if you believe that a company or individuals have participated in anti-competitive activity  | 19%     |
| The Competition Assessment Toolkit for regulators and policymakers, a step-by-step guide on how to assess the competitive impact of regulations and identify pro-competitive alternatives   | 14%     |
| The Competition Bureau's summits, which they host, such as the Green Growth Summit and the Canada's Competition Summit  | 10%     |
| The Competition Bureau's enforcement guidance documents, such as the enforcement guidelines on illegal wage-fixing and no-poaching agreements, Intellectual Property Enforcement Guidelines, Abuse of Dominance Guidelines, Merger Enforcement Guidelines, Competitor Collaboration Guidelines, and guidelines on "Product of Canada" and "Made in Canada" claims | 10%     |
| The Competition Bureau's guidance on compliance programs and/or compliance-related resources (e.g. compliance hub, Bootcamps (learning modules), podcasts and presentations)  | 5%      |
| The Competition Bureau's Immunity and Leniency Programs   | 5%      |
| The Competition Bureau's report on competitive intensity in Canada from 2000-2020   | –       |
| All of them   | 5%      |
| None of them  | 43%     |
| Don't know / Prefer not to answer   | 5%      |
| Sample size   | 21      |

Exhibit C13: Q28: Below is a list of Competition Bureau activities and publications. Please indicate the ones, if any, that are of interest to you. Please select all that apply. % Interested displayed.

Base: All respondents

| Row %  | 2023-24 |
|--|---------|
| Updates on the Competition Bureau's major enforcement cases  | 43%     |
| The <i>Little Black Book of Scams</i> – a publication with tips to help consumers and businesses recognize and report scams in Canada  | 43%     |
| The Competition Bureau's market studies (studies that assess a sector from a competition perspective)  | 43%     |
| The Competition Bureau's competition promotion work with regulators and policymakers, including submissions and regulatory interventions, such as the submission to the Government of Canada's consultation and competition policy | 38%     |
| The Competition Assessment Toolkit for regulators and policymakers, a step-by-step guide on how to assess the competitive impact of regulations and identify pro-competitive alternatives  | 38%     |
| Advice on competition-related issues from the Competition Bureau   | 33%     |

|   |     |
|---|-----|
| The Competition Bureau’s <i>Deceptive Marketing Practices Digest</i> – a publication that offers advice and presents the Bureau’s perspective on advertising and marketing practices  | 29% |
| The annual Fraud Prevention Month campaign  | 29% |
| The Competition Bureau’s report on competitive intensity in Canada from 2000 - 2020   | 24% |
| The Competition Bureau’s guidance on compliance programs and/or compliance-related resources (e.g. compliance hub, Bootcamps (learning modules), podcasts and presentations)  | 19% |
| The Competition Bureau’s enforcement guidance documents, such as the enforcement guidelines on illegal wage-fixing and no-poaching agreements, Intellectual Property Enforcement Guidelines, Abuse of Dominance Guidelines, Merger Enforcement Guidelines, Competitor Collaboration | 19% |
| All of them   | 5%  |
| None of them  | 29% |
| Don’t know / Prefer not to answer   | –   |
| Sample size   | 21  |

The respondents agree that competition drives businesses to innovate (100%), is important to the economy (100%), and plays an important role strengthening the digital economy (90%). Most agree that competition should be considered when developing policies and regulations (86%). Regulators and policymakers also agree that the Bureau’s work is beneficial to the economy (86%) and that they trust the information the Bureau provides (81%). They are less certain about the Bureau’s expertise in their specific policy area (38% agree the Bureau has sufficient expertise). About one-quarter are not sure or do not offer an answer (24%) on whether the Bureau provides sufficient information on competition to regulators and policymakers, while 38% agree that the agency provides sufficient information.

**Qualitative insights: Relevance of competition and innovation**

Some regulators and policymakers do consider competition and the need to ensure a competitive marketplace when they are designing a regulatory framework, though not all were in roles for which policy development was required.

Innovation was relevant to all interviewees and deemed fundamental for the economy. For some, innovation was relevant in the context of improving their own approaches, improving communications, and/or the implementation and efficiency of their work, including digital transformations. For others, innovation was also a consideration in terms of ensuring competitive processes and competition in the marketplace, and to stimulate development in certain jurisdictions.

In terms of understanding innovation, the vast majority did not feel they know all that they need to know about innovation. If they needed to know more, interviewees would do a mix of things ranging from waiting to see how things evolve, to online searches, or reaching out to contacts at different organizations.

“Innovation and how it is applied to so many different components is so complex, it is hard to have the capacity to summarize it all.”

Exhibit C14: Q37-45: To what extent do you agree or disagree with each of the following statements. % Agree displayed.

Base: All respondents

| Column %   | 2023-24 | 2019-20 |
|--|---------|---------|
| I believe competition drives businesses to innovate  | 100%    | 90%     |
| I believe competition is important to the Canadian economy   | 100%    | 88%     |
| I believe competition plays an important role in strengthening the digital economy   | 90%     | 80%     |
| I believe competition should be considered when developing policies and regulations  | 86%     | 92%     |
| I believe the Competition Bureau’s work is beneficial to the economy   | 86%     | 84%     |
| I would trust information provided by the Competition Bureau   | 81%     | 88%     |
| My organization conducts work that relates to the digital economy  | 62%     | 48%     |
| I believe the Competition Bureau has sufficient expertise in my policy or regulatory area                                  | 38%     | 36%     |
| I believe the Competition Bureau provides adequate advice to governmental decision-makers on issues related to competition | 38%     | 38%     |
| Sample size  | 21      | 50      |

### Impact of the Bureau’s work

Nearly two-in-five (38%) say their work has not been affected by any of the Bureau’s activities, publications or outcomes. Among those whose work has been affected, the most influential include the competition promotion work (24%) and advice on competition related issues (19%). When noting how their work has been impacted, the most common response among the regulators and policymakers is that they considered the Bureau’s work when making decisions regarding a policy or regulation (29%). This is followed by notifying the Bureau of suspected anti-competitive activity in a sector/industry (14%) and requesting a compliance presentation (10%).

#### Qualitative insights: Impact of the Bureau’s work

Some knew about the Bureau’s role in advocacy but knew it from experiences that were not necessarily the specific examples tested. For example, a Parliamentarian mentioned the Bureau’s expert testimony provided at Committee meetings.

Exhibit C15: Q29: Please indicate the activities and publications, if any, that have influenced your work, creating a change in your decision-making, policy development or regulation implementation or enforcement. Please select all that apply.

Base: All respondents

| Row %  | 2023-24 |
|--|---------|
| The Competition Bureau’s competition promotion work with regulators and policymakers, including submissions and regulatory interventions, such as the submission to the Government of Canada’s consultation and competition policy | 24%     |
| Advice on competition-related issues from the Competition Bureau   | 19%     |
| The Competition Bureau’s market studies (studies that assess a sector from a competition perspective)  | 14%     |
| Updates on the Competition Bureau’s major enforcement cases  | 10%     |
| The Competition Assessment Toolkit for regulators and policymakers, a step-by-step guide on how to assess the competitive impact of regulations and identify pro-competitive alternatives  | 10%     |

|   |     |
|---|-----|
| The Competition Bureau's enforcement guidance documents, such as the enforcement guidelines on illegal wage-fixing and no-poaching agreements, Intellectual Property Enforcement Guidelines, Abuse of Dominance Guidelines, Merger Enforcement Guidelines, Competitor Collaboration | 10% |
| The annual Fraud Prevention Month campaign  | 5%  |
| The Competition Bureau's report on competitive intensity in Canada from 2000 - 2020   | 5%  |
| The Competition Bureau's guidance on compliance programs and/or compliance-related resources (e.g. compliance hub, Bootcamps (learning modules), podcasts and presentations)  | 5%  |
| The <i>Little Black Book of Scams</i> – a publication with tips to help consumers and businesses recognize and report scams in Canada   | –   |
| The Competition Bureau's <i>Deceptive Marketing Practices Digest</i> – a publication that offers advice and presents the Bureau's perspective on advertising and marketing practices  | –   |
| All of them   | –   |
| None of them  | 57% |
| Don't know / Prefer not to answer   | 5%  |
| Sample size   | 21  |

Exhibit C16: Q30: Please specify how an activity, publication, or outcome from the Competition Bureau has affected your decision-making or work. Please select all that apply.

Base: All respondents

| Row %   | 2023-24 | 2019-20 |
|---|---------|---------|
| I considered the Bureau's work when making decisions regarding a policy or regulation                         | 29%     | 28%     |
| I notified the Competition Bureau of suspected anti-competitive activity in a sector/industry                 | 14%     | 2%      |
| I requested a compliance presentation from the Competition Bureau   | 10%     | 6%      |
| I requested advice or information from the Competition Bureau on competition and/or labelling laws and issues | 5%      | 16%     |
| I reported a scam or fraudulent activity to the Competition Bureau  | –       | 4%      |
| No activity, publication or outcome from the Competition Bureau affected my decision-making or work           | 43%     | 8%      |
| Don't know / Prefer not to answer   | 14%     | 52%     |
| Sample size   | 21      | 50      |

## Contact with the Bureau

Overall, nearly half (48%) have contacted the Bureau, including 19% who have done so in the past year; this is up 20% from the previous study. The majority sent an email to a Competition Bureau employee (60%). Fewer contacted ISED (20%), the Information Centre, the Merger Intelligence and Notification Unit, or the Department of Justice or the justice department in their province (all 10%). Another 29% have had an in-person contact with the Bureau, including 5% who have done so in the past year.

When it comes to why respondents contacted the Bureau, the most frequently cited reasons are for advice on regulations or policies (40%), to file a complaint (30%), or for information on their enforcement guidelines, on competition and/or labelling laws, on or related to a scam or



deceptive marketing practices, or an investigation, (all 20%). Seven-in-ten found the information or service provided by the Bureau useful or effective (70%).

**Qualitative insights: Contact with the Bureau**

In terms of contact with the Bureau, some have had contact with the Bureau: two have seen the Bureau at Committee or when they have appeared in the media. Only one interviewee seemed to be in regular, monthly, contact with the Bureau.

Despite the limited interaction with the Bureau, the few who had described their interactions as generally positive.

“I found them knowledgeable, professional, and timely.”

**Exhibit C17: Q31: Have you ever contacted the Competition Bureau?**

Base: All respondents

| Column %                           | 2023-24 | 2019-20 |
|------------------------------------|---------|---------|
| Yes, in the past 12 months         | 19%     | 10%     |
| Yes, but not in the past 12 months | 29%     | 18%     |
| No                                 | 52%     | 70%     |
| Don't know / Prefer not to answer  | –       | 2%      |
| Sample size                        | 21      | 50      |

**Exhibit C18: Q36: Have you ever had any in-person contact with the Competition Bureau, such as at a tradeshow, conference, or outreach event?**

Base: All respondents

| Column %  | 2023-24 |
|---|---------|
| Yes, recently in the past 12 months               | 5%      |
| Yes, but not recently (not in the past 12 months) | 24%     |
| No  | 71%     |
| Don't know / Prefer not to answer                 | –       |
| Sample size                                       | 21      |

**Exhibit C19: Q32: How did you contact the Competition Bureau? [Accept all]**

Base: Among those who have contacted the Competition Bureau (Q31)

| Column %  | 2023-24 | 2019-20 |
|---|---------|---------|
| I sent an email to a Competition Bureau employee/representative                               | 60%     | 57%     |
| I contacted Innovation, Science and Economic Development Canada (Government of Canada)        | 20%     | –       |
| I contacted their Information Centre  | 10%     | 14%     |
| I contacted the Merger Intelligence and Notification Unit                                     | 10%     | 14%     |
| Through the Department of Justice Canada or the justice/legislative department in my province | 10%     | –       |
| I called the Federal Contracting Fraud Tip Line   | –       | –       |
| Through social media  | –       | 7%      |
| Other (specify)   | 30%     | 14%     |
| Don't know / Prefer not to answer   | –       | 7%      |
| Sample size   | 10      | 14      |

Exhibit C20: Q33: Why did you contact the Competition Bureau? [Accept all]  
 Base: Among those who have contacted the Competition Bureau (Q31)

| Column %   | 2023-24 | 2019-20 |
|--|---------|---------|
| For advice on regulations or policies  | 40%     | 21%     |
| To file a complaint  | 30%     | 7%      |
| For information on their enforcement guidelines                              | 20%     | 14%     |
| For information on competition and/or labelling laws                         | 20%     | 21%     |
| For information on or to report a scam or other deceptive marketing practice | 20%     | 14%     |
| For information on an investigation  | 20%     | 21%     |
| Merger notification  | 10%     | –       |
| To request a compliance presentation   | 10%     | 14%     |
| Other (specify)  | –       | 7%      |
| Don't know / Prefer not to answer  | 10%     | 14%     |
| Sample size  | 10      | 14      |

Exhibit C21: Q34: Did you find the information or service provided by the Competition Bureau useful or effective?

Base: Among those who have contacted the Competition Bureau (Q31)

| Column %                          | 2023-24 | 2019-20 |
|-----------------------------------|---------|---------|
| Yes                               | 70%     | 50%     |
| No                                | 30%     | 21%     |
| Don't know / Prefer not to answer | –       | 28%     |
| Sample size                       | 10      | 14      |

In terms of additional information respondents would like to receive from the Bureau, most do not want more information (76%) or do not offer a response (15%). In terms of preferred method of receiving information, a little over half (57%) of respondents would prefer to receive information via email. Fewer prefer the Bureau’s website (24%) or social media (5%).

**Qualitative insights: Information needs**

While not all interviewees felt they needed more information, there was broad interest in a list/summary of the various Bureau cases, activities, and publications. Interviewees felt awareness and communications about the Bureau’s work was low.

“It would be good to have a publication about what they are dealing with – gas competition, cell service, grocery, etc. What is the laundry list of what they are looking into and what are they doing about it?”

“This conversation has been very helpful. I’d like to be on a mailing list. There needs to be a summary document to allow you to click through to something that is of interest.”

“I don’t know as much about it as I should. If they’re taking suggestions, a bit more proactive advertising in terms of the work they do.”

Should they have any concerns and/or questions related to innovation, competition, anti-competitive practices or any of the Acts, no one was hesitant to reach out to the Bureau, though one did offer that they may not think of the Bureau should they have a concern and/or question related to innovation.

In term of their preferred method of communication, the vast majority said email though one also suggested social media presence.

Exhibit C22: Q46: What additional information, if any, would you like to receive from the Competition Bureau?

Base: All respondents

| Column %  | 2023-24 | 2019-20 |
|---|---------|---------|
| New updates / Information / Newsletter                                    | –       | 4%      |
| Advertising (what they do, what public should know, how to contact, etc.) | –       | 4%      |
| Protection of personal and confidential information                       | –       | 2%      |
| Regulatory information  | –       | 2%      |
| Other   | 10%     | 4%      |
| None / Nothing  | 76%     | 52%     |
| Don't know / Prefer not to answer   | 15%     | 34%     |
| Sample size   | 21      | 50      |

Exhibit C23: Q47: What is your preferred method of receiving information about and from the Competition Bureau?

Base: All respondents

| Column %                              | 2023-24 | 2019-20 |
|---------------------------------------|---------|---------|
| Email                                 | 57%     | 46%     |
| Website                               | 24%     | 18%     |
| Social media (e.g. Facebook, Twitter) | 5%      | 14%     |
| Telephone                             | –       | 2%      |
| In-person                             | –       | 2%      |
| Don't know / Prefer not to answer     | 15%     | 6%      |
| Sample size                           | 21      | 50      |

### Proposed changes to the *Competition Act*

Close to half (48%) recall reading, seeing or hearing something about changes to the *Competition Act* introduced in Parliament in the fall of 2023. Nearly two-thirds (62%) think these changes will have a positive impact on the range of choices available to consumers, while 43% think they will have a positive impact on the affordability of items such as groceries.

Exhibit C24: Q48: Prior to taking this survey, had you read, seen or heard anything about changes to the *Competition Act* introduced in Parliament in the fall of 2023?

Base: All respondents

| Column %  | 2023-24 |
|---|---------|
| Do not recall reading, seeing or hearing anything   | 52%     |
| Vaguely recall reading, seeing or hearing something | 24%     |
| Clearly recall reading, seeing or hearing something | 24%     |
| Don't know / Prefer not to answer                   | –       |
| Sample size   | 21      |

Respondents were provided with the following description of the amendments:

On December 15, 2023, important amendments to the *Competition Act* became law, strengthening the Competition Bureau’s ability to promote competition and to prevent anti-competitive mergers and conduct.

Notably, these amendments:

- Create a framework for market studies that allows for collecting necessary information;
- Remove the efficiency defence in merger reviews and business collaborations;
- Simplify the legal test for abuse of dominance and increase the maximum penalties available; and,
- Expand the scope of the law to restrict more anti-competitive business collaborations.

A majority (62%) of respondents say that they believe the changes described will have a positive impact on the range of choice for consumers, however, fewer (43%) say it will have a positive impact on affordability. Instead, three-in-ten suggest that these changes will have no meaningful impact on affordability. One-quarter of respondents were not sure what impact these changes would have on choice or affordability (both at 24%).

Exhibit C25: Q49: What impact, if any, do you think these changes will have in each of the following areas? The range of choices available to consumers.

Base: All respondents

| Column %                          | 2023-24 |
|-----------------------------------|---------|
| Very positive impact              | 19%     |
| Somewhat positive impact          | 43%     |
| No impact                         | 10%     |
| Somewhat negative impact          | 5%      |
| Very negative impact              | –       |
| Don’t know / Prefer not to answer | 24%     |
| Sample size                       | 21      |

Exhibit C26: Q50: What impact, if any, do you think these changes will have in each of the following areas? The affordability of items such as groceries.

Base: All respondents

| Column %                          | 2023-24 |
|-----------------------------------|---------|
| Very positive impact              | 10%     |
| Somewhat positive impact          | 33%     |
| No impact                         | 29%     |
| Somewhat negative impact          | 5%      |
| Very negative impact              | –       |
| Don’t know / Prefer not to answer | 24%     |
| Sample size                       | 21      |

## Conclusions

This current study serves as a benchmark measuring most variables against a nearly identical baseline study conducted four years ago (2019-20). The findings in this (2023-24) wave of study do show some shifts from what was found, but for the most part, the story is the same, particularly while bearing in mind that the sample of regulators and policymakers – which showed some shifts that appear large – was comprised of such a small sample that findings should be considered qualitative or directional in nature.

As was found four years ago, the findings once again indicate that the Bureau, including its roles and activities, are not well known to consumers, SMBs, and multinationals stakeholders, while these are all more familiar to regulators and policymakers. Despite the lack of familiarity with the Bureau by name, or several of the Acts it enforces, the findings also show that there is clearly an assumption that the role is being played, that it is an extremely important role, and there is widespread endorsement of the aims of the Bureau.

Further, there continues to be interest among all audiences in the activities that they find relevant to their daily life or their work. As was found in the previous study, the high-profile cases that the Bureau works on tend to be more widely recognized and appreciated than the Bureau is. This is not because people harbour any particular negativity towards the Bureau – on the contrary, among those who offer an opinion, it is certainly more positive than negative – but rather that the cases are what people recall more than the fact that it was the Bureau's work.

For consumers, SMBs and multinationals who struggle most to correctly identify the Bureau as being the organization playing the role it plays, they value the role and appreciate the cases they have seen brought forward. That said, among the cases tested, it is clear that many, or perhaps most, are not being noticed nearly as much as the highest-profile cases.

The activities and publications audiences find important already could also be a tool to encourage Canadians to think more about how the Acts the Bureau enforces relate to their lives, and to reinforce the importance of competition in the Canadian marketplace.

The stakeholders who are less knowledgeable of the Bureau form a positive opinion of the Bureau when provided with information on these topics. There is curiosity among consumers, SMB and multinational decision-makers about the Bureau and appetite for more information. Regulators and policymakers, while more knowledgeable of the Bureau, still lack some information about the Bureau's roles. Like the other audiences, they hold positive views of the Bureau, but their information needs are different.

As with the previous study, few among the consumer, SMB and multinational audiences in both the quantitative and qualitative research can name the Bureau as the organization charged with protecting consumers and businesses from anti-competitive practices. There remains opportunity for awareness-building.

Although consumers, SMBs and multinationals tend not to have had contact with the Bureau and few see themselves as having been impacted by its work. Regulators and policymakers continue to hold a higher base level of awareness and understanding of the Bureau and have

had more interaction with it in the course of their work. Further, among those who have had contact with the Bureau, the impressions have been quite positive.

When prompted with a variety of examples of the Bureau’s work, people were again, generally surprised by the breadth of roles the Bureau plays.

It does seem that the Bureau could benefit from a focused approach to awareness-raising. For example, while these studies continue to test the four Acts the Bureau enforces, perhaps recalling the Acts themselves is not as relevant a test – at least among consumers, SMBs and multinationals – as simply understanding that the Bureau exists and is actively working to maintain, encourage and ensure fair competition in Canadian markets. Similarly, the conflation of terms and misunderstanding of terms like cartel may be more helpful for understanding depth of knowledge, it may not be resulting in, nor enabling, anti-competitive behaviours. For the most part, participants in the qualitative research could articulate the kinds of business behaviours that are inappropriate, even if they did not use the proper legal term when they did.

When testing the consumer and business alerts, this exposure tended to be the first time any participants had seen them, but upon being exposed to them, tended to see some value in how this information could apply to their life or work. For example, the SMB reaction was quite positive to the advice about speaking with employees about ensuring they disclose their place of work if they are posting online reviews of their employer or a competitor.

Similarly, the Little Black Book of Scams continues to generate a lot of interest among any of these audiences when tested either quantitatively or qualitatively. It piques curiosity, which is a rare gift for a government publication.

All evidence points to the fact that there is ample opportunity to meet these target audiences each on their own, unique level and deliver some brand-reinforcing information that is helpful to them, and which can impact their life or work while leaving them even more confident that Canada’s Competition Bureau is an effective body protecting competition in the marketplace.

## Appendix A: Focus group and interview methodology report

### Methodology

The qualitative phase of the research included online focus groups and in-depth interviews conducted between February 27 and March 22, 2024. Our specific approach was as follows:

- Two (2) focus groups with Canadian consumers and members of the general public.
- Six (6) focus groups with decision-makers in small and medium-sized businesses (SMBs).
- Seven (7) in-depth interviews with decision-makers in global multinational companies.
- Seven (7) in-depth interviews with regulators and policymakers (who work in the national, provincial, or municipal sectors).

For each focus group, a maximum of eight (8) individuals were recruited as participants, a total of 56 people participated in the focus group discussions.

All of the focus groups were conducted online with three groups in French (one among consumers and two among SMBs), and five groups in English. Each group was approximately 90 minutes in length.

For the interviews, fourteen (14) individuals were recruited and participated including seven (7) multinationals and seven (7) regulators and policymakers. One interview with a regulator and policymaker was conducted in French, and thirteen were conducted in English.

The in-depth interviews were conducted by videoconference (Teams) or telephone, depending on the interviewees' preference. The interviews were approximately 30 to 40 minutes in length.

In appreciation of their time, consumers were provided with an honorarium of \$100 for their time; business decision-makers were provided with an honorarium of \$350 for their time. Regulators and policymakers were not provided with an honorarium as their participation was volunteered.

### Schedule and composition of the focus groups

| Group #                      | Audience  | Region          | Time  | Number of participants |
|------------------------------|-----------|-----------------|---|------------------------|
| Tuesday, February 27, 2024   |           |                 |   |                        |
| 1                            | SMBs      | East in English | 4:00 pm ET/5:00 pm AT/5:30 pm NT                                  | 8                      |
| 2                            | SMBs      | East in French  | 6:00 pm ET/7:00 pm AT/7:30 pm NT                                  | 6                      |
| 3                            | SMBs      | East in English | 6:00 pm ET/7:00 pm AT/7:30 pm NT                                  | 7                      |
| 4                            | SMBs      | East in French  | 8:00 pm ET/9:00 pm AT/9:30 pm NT                                  | 7                      |
| 5                            | SMBs      | West in English | 8:00 pm ET/7:00 pm CT/6:00 pm MT/5:00 pm PT                       | 8                      |
| Wednesday, February 28, 2024 |           |                 |   |                        |
| 6                            | Consumers | French          | 5:00 pm ET/6:00 pm AT/6:30 pm NT                                  | 6                      |
| 7                            | Consumers | English         | 7:00 pm ET/8:00 pm AT/8:30 pm NT/5:00 pm CT/5:00 pm MT/4:00 pm PT | 8                      |

|   |      |                 |   |   |
|---|------|-----------------|---|---|
| 8 | SMBs | West in English | 8:00 pm ET/7:00 pm CT/6:00 pm MT/5:00 pm PT | 6 |
|---|------|-----------------|---|---|

Schedule and composition of the in-depth interviews

| Audience                  | Dates                      | Number of interviewees |
|---------------------------|----------------------------|------------------------|
| Multinationals            | February 29-March 7, 2024  | 7                      |
| Regulators & policymakers | February 28-March 22, 2024 | 7                      |

## Recruitment

Participants were recruited using a screening questionnaire (included in Appendix D). Different screening questionnaires were used for the consumer and SMB groups, and the global multinational interviews; regulators and policymakers were recruited using a client-provided list.

The screener for the consumers contained a series of standard screening questions to ensure participants qualified based on their age (Canadians 18+), ensuring a good mix of other demographics such as education, household income, ethnicity, etc. The screener for SMBs and multinationals included a series of questions to ensure participants worked and held a decision-making role in small and medium-sized businesses (SMBs). For the groups with SMBs, we ensured a good mix of small (1-99 employees) and medium (100-499 employees) businesses across a variety of industry sectors. For the interviews with multinationals, we ensured that the interviewee worked for a company that operates in two or more countries other than the home country. We also ensured a good mix of small (1-99 employees), medium (100-499 employees) and large (500+ employees) businesses across a variety of industry sectors.

For the interviews with regulators and policymakers, using the list provided by the Bureau, Earnscliffe made the initial contact by email, and followed up with additional emails and telephone calls to schedule interviews at a date and time that was convenient to the interviewees.

Our fieldwork subcontractor for the focus groups and interviews with multinationals, we relied on Quality Response. Earnscliffe and Quality Response have partnered together successfully for numerous Government of Canada qualitative recruitment projects.

To recruit, Quality Response relied on panels and databases of Canadians. This is the approach employed most often. Quality Response reaches out to members of their database first via email and follows-up with telephone calls to pre-qualify respondents.

Quality Response’s database includes approximately 35,000 Canadians with profiling on a range of attributes including standard personal demographics, household composition, medical background, technology usage, financial services, health and wellness, business profiles, and other relevant criteria. Their database is constantly being updated and replenished and operates out of their own, onsite telephone room in Toronto, Ontario. Potential group participants are recruited to their database via mixed-mode: following a proprietary telephone survey, online, referral, social media and print advertising. Initial contact is often made via email or online pre-screening for speed and economies, followed up by personal telephone recruitment and pre-group attendance confirmation.



Quality Response supplemented their recruitment with qualitative panel partners for specific areas including Metroline (Atlantic Canada; 4,500 Canadians), Brookson Research (Atlantic Canada; 9,500 Canadians); MBA Recherche (Quebec; 35,000 Canadians), Pele Research (Western and Northern Canada; 3,000 Canadians), Qualitative Coordination (Western and Northern Canada; 5,500 Canadians), and Walmsley (Western and Northern Canada; 5,500 Canadians).

While qualitative research and their panels more generally are not meant to be representative of the general population in Canada, every attempt is made to ensure each panel composition is reflective of the general population by region, age, and gender.

Quality Response understands the nuances of qualitative recruitment and the importance of locating qualified, interested respondents. Their recruitment is undertaken in strict accordance with the Standards for the Conduct of Government of Canada Public Opinion Research – Qualitative Research.

Reminder calls were made prior to the groups and interviews to confirm participants'/interviewees' intentions to attend and to encourage higher rates of participation.

## Moderation

We relied on three qualified moderators (two for the focus groups and three for the interviews).

Given the timeline for the focus groups, using two moderators allowed us to conduct all of the focus groups over the course of two days (2 evenings). Both moderators attended the kick-off night of the first online focus group. This ensured that both were aware of the flow of the focus groups and involved in any conversation about potential changes to the discussion guide or flow of conversation for the subsequent groups.

In our experience, there is value in using multiple moderators (within reason) as it ensures that no single moderator develops early conclusions. Each moderator takes notes and summarizes their groups after each night. The moderators each provide a debrief on their groups/interviews, including the functionality of the discussion/interview guide, any issues relating to recruiting, turnout, and technology, and key findings, including noting instances where they were unique and where they were similar to previous sessions. Together, they discuss the findings on an ongoing basis in order to allow for probing of areas that require further investigation in subsequent groups/interviews and before the final results are reported.

## A note about interpreting qualitative research results

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.

## Glossary of terms

The following is a glossary of terms which explains the generalizations and interpretations of qualitative terms used throughout the report. These phrases are used when groups of participants/interviewees share a specific point of view and emerging themes can be reported. Unless otherwise stated, it should not be taken to mean that the rest of participants/interviewees disagreed with the point; rather others either did not comment or did not have a strong opinion on the question.

### Glossary of terms

| Generalization       | Interpretation   |
|----------------------|--|
| Few                  | Few is used when less than 10% of participants/interviewees have responded with similar answers.   |
| Several              | Several is used when fewer than 20% of the participants/interviewees responded with similar answers.   |
| Some                 | Some is used when more than 20% but significantly fewer than 50% of participants/interviewees responded with similar answers.  |
| Many                 | Many is used when nearly 50% of participants/interviewees responded with similar answers.  |
| Majority/Plurality   | Majority or plurality are used when more than 50% but fewer than 75% of the participants/interviewees responded with similar answers.  |
| Most                 | Most is used when more than 75% of the participants/interviewees responded with similar answers.   |
| Vast majority        | Vast majority is used when nearly all participants/interviewees responded with similar answers, but several had differing views.   |
| Unanimous/Almost all | Unanimous or almost all are used when all participants/interviewees gave similar answers or when the vast majority of participants/interviewees gave similar answers and the remaining few declined to comment on the issue in question. |

## Appendix B: Discussion guides

### Discussion guide: Consumers

#### Introduction

Section time: 5 min / Cumulative time: 5 min

Moderator introduces herself/himself and her/his role: role of moderator is to ask questions, make sure everyone has a chance to express themselves, keep track of the time, be objective/no special interest. Thanks participants for attending / value of being there.

- The name of the firm the moderator works for, and the type of firm that employs them (i.e. an independent public opinion research firm)
- These groups are being conducted on behalf of the Government of Canada, in order to explore awareness of some programs and activities.
- We are interested in hearing your opinions; no attempt will be made to sell you anything or change your point of view.
- Role of participants: speak openly and frankly about opinions, remember that there are no right or wrong answers and no need to agree with each other
- Participants do not have to direct all comments to the moderator; they can exchange ideas with each other.
- Results are anonymous and reported all together/individuals are not identified/participation is voluntary.
- The length of the session (90 minutes)
- The presence of any observers, their role and purpose, and the means of observation
- The presence and purpose of any recording being made of the session (video recording of the discussion)

*Moderator will go around the table and ask participants to introduce themselves.*

*So let's go around and have everyone introduce themselves. Tell us your first name and a little bit about yourself, such as what you do during the day and what is your favourite hobby.*

#### Basic awareness and knowledge of the Competition Bureau

**Section time: 10 min / Cumulative time: 15 min**

- [chat] In the chat, please write the name of the organization or agency that you would contact if you had issues, questions or concerns related to deceptive marketing practices, certain types of fraud like mass-marketing fraud, false or misleading advertising, businesses participating in price-fixing or market-allocation or bid-rigging?
- [hands up] Please raise your hand if you are aware of any government agency or agencies dedicated to addressing issues related to fraud, false or misleading representations on products and services, price-fixing, bid-rigging, providing tips to consumers and businesses to protect themselves against fraud and reviewing mergers between companies?

[if yes]

- What are they?
- How effective do you think they are? [*ensure to probe any who mention: competition bureau*]

- [hands up] Who here has heard of the Competition Bureau (prior to being contacted for this focus group)?
- [hands up] And who has seen, read or heard anything about the Competition Bureau in recent years?

[if yes to either]

- How familiar would you say you are with the Competition Bureau and what it does?
- What exactly is the role of the Competition Bureau?
  - Where did you get this information? [*moderator be sure to probe for specifics*]
  - Probe: What sort of Bureau activities are you aware of? [listen for enforcement, advocacy, outreach]
  - If necessary: As far as you know, what does the Competition Bureau do, if anything, relating to enforcement of any Acts?
  - If necessary: As far as you know, what does the Competition Bureau do, if anything, relating to advocacy? By advocacy, we mean promoting the advantages of competition, providing advice to government, and conducting market studies.
  - If necessary: As far as you know, what does the Competition Bureau do, if anything, relating to outreach? By outreach, we mean providing general information to businesses and consumers; providing guidance to businesses, and making announcements on activities.
- What have you seen, read or heard in recent years?
  - Where did you get this information? [moderator be sure to probe for specifics]
- Have you ever contacted the Competition Bureau?
  - How did you try to reach them? [moderator probe for channel: Bureau Information Centre, Bureau website, Federal Contracting Fraud Tip Line, Canadian Anti-Fraud Centre, presentation delivered by Bureau employees, Bureau News Releases, Bureau social media pages, etc.]
    - **If more than one:** which channel do you prefer?
    - How would you describe your experience contacting the Competition Bureau?
      - Were you satisfied with the service?
      - Were you able to get the information you were looking for?

## Understanding of the Competition Bureau's mandate and relevance

**Section time: 40 min / Cumulative time: 55 min**

[moderator to randomize order]

- Raise your hand if you had heard about the **Competition Act**?
  - Keep your hand raised if you knew it was enforced by the Competition Bureau.
    - For those who had heard: What do you know about it? Where did you get this information?

- So we all have the same understanding, the *Competition Act* is a “Federal law that governs most business conduct in Canada and aims to prevent anti-competitive market practices.”

[if necessary for moderator to provide more info on ‘anti-competitive practices’: Use the following as examples - **Ensuring truth in advertising** – Promoting truth in advertising by discouraging deceptive business practices and how you can make informed choices. **Investigating cartels** – Combatting businesses who agree to act together to fix prices, rig bids, allocate market or restrict supply. **Preventing abuse of market power** – Ensuring dominant companies do not exploit their market power or engage in acts that lessen competition. **Reviewing mergers** – Conducting reviews of business mergers to ensure they do not substantially lessen or prevent competition.]

- Based on this description, do you feel this *Act* (law) relates to you in any way? If so, how?
- Raise your hand if you had heard about the ***Consumer Packaging and Labelling Act***?
  - Keep your hand raised if you knew it was enforced by the Competition Bureau.
    - For those who had heard: What do you know about it? Where did you get this information?
  - So we all have the same understanding, the *Consumer Packaging and Labelling Act* is a “Criminal statute on packaging, labelling, sale, importation and advertising of prepackaged products”. It requires that prepackaged consumer products have accurate and meaningful labelling information. For the purposes of tonight’s discussion, we’re not talking about how it relates to food.
  - Based on this description, do you feel this *Act* (law) relates to you in any way? If so, how?
- Raise your hand if you had heard about the ***Textile Labelling Act***?
  - Keep your hand raised if you knew it was enforced by the Competition Bureau.
    - For those who had heard: What do you know about it? Where did you get this information?
  - So we all have the same understanding, the *Textile Labelling Act* is a “Criminal statute on packaging, labelling, sale, importation and advertising of consumer textiles.” It requires that textile articles, such as clothing, have accurate and meaningful labelling information.
  - Based on this description, do you feel this *Act* (law) relates to you in any way? If so, how?
- Raise your hand if you had heard about the ***Precious Metals Marking Act***?
  - Keep your hand raised if you knew it was enforced by the Competition Bureau.
    - For those who had heard: What do you know about it? Where did you get this information?
  - So we all have the same understanding, the *Precious Metals Marking Act* is a “Criminal statute on the marking of articles made with precious metals.”
  - Ask all: Do you feel this *Act* relates to you in any way? If so, how?
- What about anti-competitive practices, has anyone heard of this term? What does it mean to you?
  - Is it something that relates to you? If so, how?
  - Are there any particular sectors of the economy the Competition Bureau should focus it’s anti-competitive practices work? If so, which? Why?

- Are there any particular sectors of the economy you are concerned about the role of government regulations limiting competition? If so, which? Why?
- Under what circumstances, if any, would you expect to contact the Competition Bureau with concerns and questions regarding anti-competitive practices or any business' compliance with any of these Acts?
- I am going to show you some concepts. For each one, I want to get a sense of your understanding of the term.
  - Competition
  - Mass-marketing fraud
  - Scams
  - Deceptive marketing practices
  - False or misleading representations
  - Abuse of dominance
  - Collusion
  - Price-fixing
  - Bid-rigging
  - Cartels
- For each term ask:
  - Who wants to tell me their general understanding of that term? Do others think of it the same way or differently?
  - How, if at all, do you think the term relates to you?

## Awareness and impressions of the Competition Bureau's work

**Section time: 15 min / Cumulative time: 70 min**

- [show lists; raise hands] I am going to provide you with a few lists of a variety of activities, initiatives or news stories involving the Competition Bureau in recent years. For each one, please raise your hand first if you have heard about and or seen it before and again if you knew that was something that the Competition Bureau did or was involved in.

### Enforcement

- The bread price-fixing investigation, where there is an ongoing investigation into alleged price-fixing between producers to raise wholesale bread prices, as well as alleged price-fixing between grocery stores to raise retail prices. Canada Bread Company, Limited, a bread producer and distributor, was fined \$50 million after pleading guilty for its role in a criminal price-fixing arrangement.
- The Competition Bureau's attempt to seek a full-block of Rogers' proposed acquisition of Shaw.
- The Dufresne Group Inc. (TDG) and its affiliates agreed to pay \$3.25M to settle the Competition Bureau's concerns over marketing claims. The investigation found that TDG offered certain products at inflated regular prices and then advertised them at big discounts, suggesting significant savings. In addition, they made marketing claims to consumers using sale end dates or countdown timers that gave the false or misleading

impression that deals on certain items would no longer be available after a certain time, when this was not the case.

- The Competition Bureau investigation that led to multiple criminal charges against Mr. Terry Croteau of Ontario alleging the use of deceptive telemarketing and false or misleading statements to get Canadian businesses to sign up for listings in online directories.
- The Competition Bureau's actions to stop unsubstantiated weight loss claims.
- The Competition Bureau's Gatineau infrastructure bid-rigging case, where an engineering executive was accused in a bid-rigging scheme that bilked the City of Gatineau out of an estimated \$1.8 million.
- The Competition Bureau's challenge of Secure Energy Services' acquisition of Tervita Corporation.
- The Competition Bureau's review of the merger between admixture system firms Sika AG and MBCC Group.

#### Outreach

- Deceptive Marketing Practices Digest.
- Fraud Prevention Month campaign.
- Little Black Book of Scams.
- Consumer and Business Alerts.
- Presentations on bid-rigging

#### Advocacy

- Reports, such as the report on Competition in Canada from 2000 to 2020
  - Competition advocacy on issues such as pet care regulations (more competitive choices for pet medication) and competition in Canada's cannabis industry.
  - Retail grocery market study (a study of grocery competition)
  - Submissions and regulatory interventions such as those made to the Canadian Radio-Television and Telecommunications Commission (CRTC) on the wholesale high-speed access service framework
- 
- Are there any of these that stood out for you as ones you particularly recall? Were you aware the Competition Bureau did that or was involved in that?
  - Have any of these affected how you make choices (such as making purchases, reporting scams etc.) If so, which ones? What was the impact?
  - Were there any that struck you as surprising? Why?
  - Are there any that you want to know more about? Which ones and why?

#### Behaviour modification and decision-making

**Section time: 10 min / Cumulative time: 80 min**

- Has anyone ever heard of or been a victim of a scam or fraudulent activities or are you aware of any scam or fraudulent activity that affected someone close to you? If so, what happened?
- How did you or the person respond to this issue? Where did you go, or where would you go to obtain more information about this?

- What sources would you say you trust to receive information about what scams are out there?
- [hands up] Has anyone heard about Black Friday scams, rental apartment scams, or online dating site scams?

[if yes]

- What did you hear?
- Did you go anywhere to obtain additional information?

Next we are going to focus on consumer alerts. The Competition Bureau defines consumer alerts as, “Alerts contain useful information for Canadian consumers and businesses to help them recognize, reject and report deceptive marketing practices, misleading advertising and scams”.

- With this definition in mind, can you remember seeing a consumer alert?

[if yes]

- Where did you see it? What was the topic of the alert?
- Did you find it helpful? Was there any missing information?

*Moderator to link to consumer alerts related to [online consumer reviews](#), [cryptocurrency](#), and [greenwashing](#).*

- Has anyone seen any of these alerts before today? If so, how did you come across it? Did you do anything with or as a result of the information?
- Seeing some examples of consumer alerts from the Competition Bureau, are these things that you might find helpful? Why/Why not?
- Would you trust the information being provided to you in these alerts?
- Would any of these alerts cause you to act differently at all? Having looked at these, do you expect there are other alerts that you should know about?
- Now that we’ve reviewed a lot of information about the Competition Bureau, do you recall whether any information that the Competition Bureau had provided (whether directly to you or through some other intermediary like a lawyer or accountant) has ever impacted your decisions or behaviour in any way? If so, what Bureau information was that and what impact did it have on you?

### Information needs

**Section time: 5 min / Cumulative time: 85 min**

- Can you think of any additional information you may want or need in order to help protect yourself from deceptive practices such as different types of scams and mass-mass marketing fraud in the future? What about information you may want or need to learn about anti-competitive and deceptive business practices?
- When thinking about the Competition Bureau, what types of information would you consider useful?



- What information, if any, would you like to receive to help ensure you don't end up a victim of deceptive practices such as different types of scams and mass-marketing fraud and to make more informed decisions in the future?
- Are there any other topics or details you'd like to hear more about from the Competition Bureau? If yes, which ones and what would you like to know?
- What would be your preferred method of receiving information about and from the Competition Bureau?

## Conclusions

**Section time: 5 min / Cumulative time: 90 min**

*Moderator to check in with observers and probe on any additional areas of interest.*

- This concludes what we need to cover. We really appreciate you taking the time to share your views. Your input is very important.
- In parting, do you have any final comments and/or advice for the Competition Bureau? Is there anything that you think I should have asked but didn't?

Thanks again and have a great day!

## Discussion guide: SMBs

### Introduction

**Section time: 5 min / Cumulative time: 5 min**

Moderator introduces herself/himself and her/his role: role of moderator is to ask questions, make sure everyone has a chance to express themselves, keep track of the time, be objective/no special interest. Thanks participants for attending / value of being there.

- The name of the firm the moderator works for, and the type of firm that employs them (i.e. an independent public opinion research firm).
- These groups are being conducted on behalf of the Government of Canada, in order to explore awareness of some programs and activities.
- We are interested in hearing your opinions; no attempt will be made to sell you anything or change your point of view.
- Role of participants: speak openly and frankly about opinions, remember that there are no right or wrong answers and no need to agree with each other.
- Participants do not have to direct all comments to the moderator; they can exchange ideas with each other.
- Results are anonymous and reported all together; individuals are not identified; participation is voluntary.
- The length of the session (90 minutes).
- The presence of any observers, their role and purpose, and the means of observation.
- The presence and purpose of any recording being made of the session (video recording of the discussion).

*Moderator will go around the table and ask participants to introduce themselves.*

- What is your role or your position in your company?
- What type of business do you own / operate / manage?
- In that role, what would you say is your biggest concern these days? What keeps you awake at night?

### Basic awareness and knowledge of the Competition Bureau

**Section time: 10 min / Cumulative time: 15 min**

- [chat] In the chat, please write the name of the organization or agency that you would contact if you had issues, questions or concerns related to certain types of fraud such as mass-marketing fraud, false or misleading representations, price-fixing, or bid-rigging?
- [hands up] Please raise your hand if you are aware of any government agency or agencies dedicated to addressing issues related to certain types of fraud such as mass-marketing fraud, cartels (for example, price-fixing, market allocation, collusion); false or misleading representations, mergers.

[if yes]

- What are they?
- How effective do you think they are at addressing the issues? [ensure to probe any who mention: Competition Bureau]

- [hands up] Who here has heard of the Competition Bureau (prior to being contacted for this focus group)?
- [hands up] And who has seen, read or heard anything about the Competition Bureau in recent years?

[If yes to either]

- How familiar would you say you are with the Competition Bureau and what it does?
- What exactly is the role of the Competition Bureau?
  - Where did you get this information? [*moderator be sure to probe for specifics*]
  - Probe: What sort of Bureau activities are you aware of? [listen for enforcement, advocacy, outreach]
  - If necessary: As far as you know, what does the Competition Bureau do, if anything, relating to enforcement of any Acts (laws)?
  - If necessary: As far as you know, what does the Competition Bureau do, if anything, relating to advocacy? By advocacy, we mean promoting the advantages of competition, providing advice to government, and conducting market studies.
  - If necessary: As far as you know, what does the Competition Bureau do, if anything, relating to outreach? By outreach, we mean providing general information to businesses and consumers, providing guidance to businesses, and making announcements on activities.
- What have you seen, read or heard in recent years?
  - Where did you get this information? [moderator be sure to probe for specifics]
- Have you ever contacted the Competition Bureau?
- How did you try to reach them? [moderator probe for channel: Bureau Information Centre (either by telephone or an online form), Bureau website, Federal Contracting Fraud Tip Line, Canadian Anti-Fraud Centre, presentation delivered by Bureau employees, Bureau News Releases, Bureau social media pages, etc.]
  - **If more than one:** which channel do you prefer?
  - How would you describe your experience contacting the Competition Bureau?
    - Were you satisfied with the service?
    - Were you able to get the information you were looking for?

## Understanding of the Competition Bureau's mandate and relevance

**Section time: 40 min / Cumulative time: 55 min**

[moderator to randomize order]

- Raise your hand if you had heard about the **Competition Act**?
  - Keep your hand raised if you knew it was enforced by the Competition Bureau.

- For those who had heard: What do you know about it? Where did you get this information?
- So we all have the same understanding, the *Competition Act* is a “Federal law that governs most business conduct in Canada and aims to prevent anti-competitive market practices.”

[if necessary for moderator to provide more info on ‘anti-competitive practices’: Use the following as examples - **Ensuring truth in advertising** – Promoting truth in advertising by discouraging deceptive business practices and how you can make informed choices. **Investigating cartels** – Combatting businesses who agree to act together to fix prices, rig bids, allocate market or restrict supply. **Preventing abuse of market power** – Ensuring dominant companies do not exploit their market power or engage in acts that lessen competition. **Reviewing mergers** – Conducting reviews of business mergers to ensure they do not substantially lessen or prevent competition.]

- Based on this description, do you feel this Act (law) relates to your business in any way? If so, how?
  - Do you know of any policies or procedures you have in place to make sure you are compliant with the Act?
    - If yes: Probe for examples of the types of policies and procedures
  - Do you feel you know all that you need to know about how to be compliant with the *Competition Act*?
  - If you needed to confirm that you are compliant, what would you do?
- Raise your hand if you had heard about the ***Consumer Packaging and Labelling Act***?
    - Keep your hand raised if you knew it was enforced by the Competition Bureau.
      - For those who had heard: What do you know about it? Where did you get this information?
    - So we all have the same understanding, the *Consumer Packaging and Labelling Act* is a “Criminal statute on packaging, labelling, sale, importation and advertising of prepackaged products”. It requires that prepackaged consumer products have accurate and meaningful labelling information. For the purposes of tonight’s discussion, we’re not talking about how it relates to food.
    - Based on this description, do you feel this Act (law) relates to your business in any way? If so, how?
    - Do you know of any policies or procedures you have in place to make sure you are compliant with the Act?
      - If yes: Probe for examples of the types of policies and procedures
    - Do you feel you know all that you need to know about how to be compliant with the *Consumer Packaging and Labelling Act*?
    - If you needed to confirm that you are compliant, what would you do?
- Raise your hand if you had heard about the ***Textile Labelling Act***?
    - Keep your hand raised if you knew it was enforced by the Competition Bureau.
      - For those who had heard: What do you know about it? Where did you get this information?

- So we all have the same understanding, the *Textile Labelling Act* is a “Criminal statute on packaging, labelling, sale, importation and advertising of consumer textiles.” It requires that textile articles, such as clothing, have accurate and meaningful labelling information.
- Based on this description, do you feel this Act (law) relates to your business in any way? If so, how?
- Do you know of any policies or procedures you have in place to make sure you are compliant with the Act?
  - If yes: Probe for examples of the types of policies and procedures
- Do you feel you know all that you need to know about how to be compliant with the *Textile Labelling Act*?
- If you needed to confirm that you are compliant, what would you do?
  
- Raise your hand if you had heard about the ***Precious Metals Marking Act***?
  - Keep your hand raised if you knew it was enforced by the Competition Bureau.
    - For those who had heard: What do you know about it? Where did you get this information?
  - So we all have the same understanding, the *Precious Metals Marking Act* is a “Criminal statute on the marking of articles made with precious metals.”
  - Based on this description, do you feel this Act (law) relates to your business in any way? If so, how?
  - Do you know of any policies or procedures you have in place to make sure you are compliant with the Act?
    - If yes: Probe for examples of the types of policies and procedures
  - Do you feel you know all that you need to know about how to be compliant with the *Precious Metals Marking Act*?
  - If you needed to confirm that you are compliant, what would you do?
  
- What about anti-competitive practices, what does it mean to you?
  - Is it something that relates to your business? If so, how?
  - Are there any particular sectors of the economy the Competition Bureau should focus its anti-competitive practices work? If so, which? Why?
  - Are there any particular sectors of the economy you are concerned about the role of government regulations limiting competition? If so, which? Why?
  
- Under what circumstances, if any, would you expect your business to contact the Competition Bureau with concerns and questions regarding anti-competitive practices or compliance with any of these Acts?
  
- I am going to show you some concepts. For each one, I want to get a sense of your understanding of the terms.
  - Competition
  - Mass-marketing fraud
  - Scams
  - False or misleading representations
  - Abuse of dominance
  - Collusion
  - Price-fixing

- Cartels
- For each term ask:
  - Who wants to tell me their general understanding of that term? Do others think of it the same way or differently?
  - How, if at all, do you think the term relates to how your business needs to operate in order to be compliant with relevant laws?

## Awareness and impressions of the Competition Bureau's work

**Section time: 20 min / Cumulative time: 75 min**

- [show lists; raise hands] I am going to provide you with a few lists of a variety of activities, initiatives or news stories involving the Competition Bureau in recent years. For each one, please raise your hand first if you have heard about and or seen it before and again if you knew that was something that the Competition Bureau did or was involved in.

### Enforcement

- The bread price-fixing investigation, where there is an ongoing investigation into alleged price-fixing between producers to raise wholesale bread prices, as well as alleged price-fixing between grocery stores to raise retail prices. Canada Bread Company, Limited, a bread producer and distributor, was fined \$50 million after pleading guilty for its role in a criminal price-fixing arrangement.
- The Competition Bureau's attempt to seek a full-block of Rogers' proposed acquisition of Shaw.
- The Dufresne Group Inc. (TDG) and its affiliates agreed to pay \$3.25M to settle the Competition Bureau's concerns over marketing claims. The investigation found that TDG offered certain products at inflated regular prices and then advertised them at big discounts, suggesting significant savings. In addition, they made marketing claims to consumers using sale end dates or countdown timers that gave the false or misleading impression that deals on certain items would no longer be available after a certain time, when this was not the case.
- The Competition Bureau investigation that led to multiple criminal charges against Mr. Terry Croteau of Ontario alleging the use of deceptive telemarketing and false or misleading statements to get Canadian businesses to sign up for listings in online directories.
- The Competition Bureau's actions to stop unsubstantiated weight loss claims.
- The Competition Bureau's Gatineau infrastructure bid-rigging case, where an engineering executive was accused in a bid-rigging scheme that bilked the City of Gatineau out of an estimated \$1.8 million.
- The Competition Bureau's challenge of Secure Energy Services' acquisition of Tervita Corporation.
- The Competition Bureau's review of the merger between admixture system firms Sika AG and MBCC Group.

### Outreach

- Deceptive Marketing Practices Digest.

- Enforcement guidance documents such as the Intellectual Property Enforcement Guidelines, Abuse of Dominance Guidelines, Merger Enforcement Guidelines.
- Fraud Prevention Month campaign.
- Little Black Book of Scams.
- Consumer and Business Alerts.
- The Competition Bureau's [Compliance Hub](#) or compliance presentations
- Presentations on bid-rigging

#### Advocacy

- Reports, such as the report on Competition in Canada from 2000 to 2020
  - Competition advocacy on such issues as pet care regulations (more competitive choices for pet medication) and competition in Canada's cannabis industry
  - Retail grocery market study (a study of grocery competition)
  - Submissions and regulatory interventions such as those made to the Canadian Radio-Television and Telecommunications Commission (CRTC) on the wholesale high-speed access service framework
- Are there any of these that stood out for you as ones you particularly recall? If so, why did they stand out to you? Were you aware the Competition Bureau did that or was involved in that?
  - Have any of these affected how your business is guided, managed or behaves? If so, which ones? What was the impact?
  - Were there any that struck you as surprising? Why?
  - Are there any that you want to know more about? Which ones and why?

#### Behaviour modification and decision-making

**Section time: 15 min / Cumulative time: 100 min**

The Competition Bureau provides a variety of consumer and business alerts. I'm going to hand out a few examples regarding scams that may affect businesses and give you 4-5 minutes to get familiar with what these kinds of alerts are.

*Moderator to link to consumer alerts related to [online consumer reviews](#), [cryptocurrency](#), and [greenwashing](#).*

- Has anyone seen any of these alerts before today? How did you come across it? Did your business do anything with or as a result of the information?
- Seeing some examples of business alerts from the Competition Bureau, are these things that you would expect (or hope) that someone in your company is receiving? Why/Why not?
- Would you trust the information being provided to you in these alerts?
- Would any of these alerts cause your business to act differently at all? Do you expect there are other alerts that your business should know about?

## Information needs

**Section time: 10 min / Cumulative time: 85 min**

- Can you think of any additional information you may want or need in order to:
  1. Protect yourself from deceptive practices such as different types of scams and mass-marketing fraud in the future?
  2. Ensure that you are compliant with the Acts we discussed today/ that you do not partake in anti-competitive practices?
- When thinking about the Competition Bureau, what types of information would you consider useful?
- What information would you like to receive to help ensure your business is compliant with the laws we talked about and not engaging in any anti-competitive practices?
- What would be your preferred method of receiving information about and from the Competition Bureau?
- Are there any specific topics or details you would like to hear more about from the Competition Bureau? If yes, which ones and what would you like to know? How about on price structures or advertising?

## Conclusions

**Section time: 5 min / Cumulative time: 90 min**

*Moderator to check in with observers and probe on any additional areas of interest.*

- This concludes what we need to cover. We really appreciate you taking the time to share your views. Your input is very important.
- In parting, do you have any final comments and/or advice for the Competition Bureau? Is there anything that you think I should have asked but didn't?

Thanks again and have a great day!



## Appendix C: Interview guides

### Interview guide: Global multinationals

Name:

Position:

Address/Phone number:

Date/Time:

Interview conducted by:

Thank you for agreeing to take part in this research project on behalf of the Competition Bureau Canada. Just as a reminder:

- The name of the firm the moderator works for, and the type of firm that employs them (i.e. an independent public opinion research firm).
- This interview is being conducted on behalf of the Government of Canada, in order to explore awareness of some programs and activities.
- We are interested in hearing your opinions; no attempt will be made to sell you anything or change your point of view.
- Your anonymity is guaranteed, and you will not be directly cited. In this regard, we encourage you to be as frank as possible.
- Role of interviewees: speak openly and frankly about opinions, remember that there are no right or wrong answers and no need to agree with each other
- An audio recording of the interview will be produced for research purposes. It will be used by the research professional to assist in preparing a report on the research findings and will be destroyed once the report is completed.
- While representatives of the Competition Bureau are not listening in to this call, we may share the recordings with them so they can hear your comments firsthand.
- All of your personally identifiable information (i.e. name, organization name, etc.) will be edited out of the recording.
- Your participation will provide important, unvarnished feedback, that they hope will help the Competition Bureau develop strategies for improving their advocacy efforts.
- Your input will be compiled into a report that will provide feedback to the Competition Bureau.
- The length of the interview is approximately 30 to 45 minutes.
- Are you comfortable with all of this before we begin?
- If you don't have any questions, I will dive into the questionnaire which is split into five sections:
  - Basic awareness and knowledge of the Competition Bureau
  - Understanding of the Competition Bureau's mandate and relevance
  - Awareness and impressions of the Competition Bureau's work
  - Behaviour modification and decision-making
  - Information needs

### Basic awareness and knowledge of the Competition Bureau

- ‘What is the name of the organization or agency that you would contact if you had issues, questions or concerns related to certain types of fraud such as mass-marketing fraud, false or misleading representations, price-fixing, or bid-rigging?
- Have you heard of the Competition Bureau? Yes No
  - [if yes] How familiar would you say you are with the Competition Bureau and what it does? (Not at all familiar, Not very familiar, Somewhat familiar, Very familiar)
- What exactly is the role of the Competition Bureau?
- What have you seen/read/heard in recent years?
- Have you ever contacted the Competition Bureau? Yes No
  - [if yes] How did you try to reach them? Which channel did you prefer? How would you describe your experience contacting the Competition Bureau?

### Understanding of the Competition Bureau’s mandate and relevance

- Have you heard of the **Competition Act**? Yes No
- Did you know it is enforced by the Competition Bureau? Yes No

[note to interviewer, after participant answers, provide definition: The *Competition Act* is a Federal law that governs most business conduct in Canada and aims to prevent anti-competitive market practices.]

- Based on this description, do you feel this Act (law) relates to your business in any way? If so, how? Yes No
- Do you know of any policies or procedures you have in place to make sure you are compliant with the Act? Yes No
- Do you feel you know all that you need to know about how to be compliant with the *Competition Act*? Yes No
- If you needed to confirm that you are compliant, what would you do?
  
- Have you heard about the **Consumer Packaging and Labelling Act**? Yes No
- Did you know it is enforced by the Competition Bureau? Yes No

[note to interviewer, after participant answers, provide definition: The *Consumer Packaging and Labelling Act* is a “Criminal statute on packaging, labelling, sale, importation and advertising of prepackaged products”. It requires that prepackaged consumer products have accurate and meaningful labelling information.]

- Based on this description, do you feel this Act (law) relates to your business in any way? If so, how? Yes No
- Do you know of any policies or procedures you have in place to make sure you are compliant with the Act? Yes No
- Do you feel you know all that you need to know about how to be compliant with the *Consumer Packaging and Labelling Act*? Yes No
- If you needed to confirm that you are compliant, what would you do?
  
- Have you heard of the **Textile Labelling Act**? Yes No

- Did you know it was enforced by the Competition Bureau? Yes No

[note to interviewer, after participant answers, provide definition: The *Textile Labelling Act* is a “Criminal statute on packaging, labelling, sale, importation and advertising of consumer textiles.” It requires that textile articles, such as clothing, have accurate and meaningful labelling information.]

- Based on this description, do you feel this Act (law) relates to your business in any way? If so, how? Yes No
- Do you know of any policies or procedures you have in place to make sure you are compliant with the Act? Yes No
- Do you feel you know all that you need to know about how to be compliant with the *Textile Labeling Act*? Yes No
- If you needed to confirm that you are compliant, what would you do?
- Have you heard of the ***Precious Metals Marking Act***? Yes No
- Did you know it was enforced by the Competition Bureau? Yes No

[note to interviewer, after participant answers, provide definition: The *Precious Metals Marking Act* is a “Criminal statute on the marking of articles made with precious metals.”]

- Based on this description, do you feel this Act (law) relates to your business in any way? If so, how? Yes No
- Do you know of any policies or procedures you have in place to make sure you are compliant with the Act? Yes No
- Do you feel you know all that you need to know about how to be compliant with the *Precious Metals Marking Act*? Yes No
- If you needed to confirm that you are compliant, what would you do?
- Under what circumstances, if any, would you expect your business would contact the Competition Bureau with concerns and questions related to anti-competitive practices or compliance with any of these Acts?
- I am going to read you some concepts. For each one, I want to get a sense of your understanding of the terms, and how, if at all, they relate to your business needs to operate in order to be compliant.
  - Competition
  - Mass-marketing fraud
  - Scams
  - Deceptive marketing practices
  - False or misleading representations
  - Abuse of dominance
  - Collusion
  - Price-fixing
  - Bid-rigging
  - Cartels

General understanding:

Relates to your business needs in order to be compliant:

### Awareness and impressions of the Competition Bureau's work

- Which of these examples of enforcement activities, initiatives or news stories have you heard about and did you know they involved the Competition Bureau? Did any of these stand out for you? If so, why?

#### Enforcement

- The bread price-fixing investigation, where there is an ongoing investigation into alleged price-fixing between producers to raise wholesale bread prices, as well as alleged price-fixing between grocery stores to raise retail prices. Canada Bread Company, Limited, a bread producer and distributor, was fined \$50 million after pleading guilty for its role in a criminal price-fixing arrangement.
- The Competition Bureau's attempt to seek a full-block of Rogers' proposed acquisition of Shaw.
- The Dufresne Group Inc. (TDG) and its affiliates agreed to pay \$3.25M to settle the Competition Bureau's concerns over marketing claims. The investigation found that TDG offered certain products at inflated regular prices and then advertised them at big discounts, suggesting significant savings. In addition, they made marketing claims to consumers using sale end dates or countdown timers that gave the false or misleading impression that deals on certain items would no longer be available after a certain time, when this was not the case.
- The Competition Bureau investigation that led to multiple criminal charges against Mr. Terry Croteau of Ontario alleging the use of deceptive telemarketing and false or misleading statements to get Canadian businesses to sign up for listings in online directories.
- The Competition Bureau's actions to stop unsubstantiated weight loss claims.
- The Competition Bureau's Gatineau bid-rigging case, where an engineering executive was accused in a bid-rigging scheme that bilked the City of Gatineau out of an estimated \$1.8 million.
- The Competition Bureau's challenge of Secure Energy Services' acquisition of Tervita Corporation.
- The Competition Bureau's review of the merger between admixture system firms Sika AG and MBCC Group.

Heard of: Yes No

Knew they involved the Competition Bureau: Yes No

Stood out for you: Yes No

Why?

- Have any of these affected your business or impacted how your business is guided, managed or behaves? If so, which ones? What was the impact? Yes No
- Were there any that struck you as surprising? Why? Yes No
- Are there any that you want to know more about? Which ones and why? Yes No

## Behaviour modification and decision-making

- The Competition Bureau provides a variety of alerts. Which of these alerts had you seen before today? How did you come across it? Did your business do anything with or as a result of the information?
  - Deceptive Marketing Practices Digest
  - Enforcement guidance documents such as the Intellectual Property Enforcement Guidelines, Abuse of Dominance Guidelines, Merger Enforcement Guidelines
  - Fraud Prevention Month campaign
  - Little Black Book of Scams
  - Consumer and Business Alerts – including those related to cryptocurrency, online consumer reviews, and greenwashing.
  - The Competition Bureau’s Compliance Hub or compliance presentations
  - Presentations on bid-rigging
  - Reports, such as the report on Competition in Canada from 2000 to 2020
  - Competition advocacy on issues such as pet care regulations (more competitive choices for pet medication) and competition in Canada’s cannabis industry.
  - Retail grocery market study (a study of grocery competition)
  - Submissions and regulatory interventions such as those made to the Canadian Radio-Television and Telecommunications Commission (CRTC) on the wholesale high-speed access service framework

Aware: Yes No

Source(s) of awareness:

Resulted action(s):

- Seeing some examples of business alerts from the Competition Bureau, are these things that you would expect (or hope) that someone in your company is receiving? Why/Why not?
- Would you trust the information being provided to you in these alerts? Yes No
- Would any of these alerts cause your business to act differently at all? Yes No
- Do you expect there are other alerts that your business should know about? Yes No

## Information needs

- Can you think of any additional information you may want or need in order to:
  1. Protect yourself from deceptive practices such as different types of scams and mass-marketing fraud in the future?
  2. Ensure that you are compliant with the Acts we discussed today/ that you do not partake in anti-competitive practices?
- When thinking about the Competition Bureau, what types of information would you consider useful?
- What information would you like to receive to help ensure your business is compliant with the laws we talked about and not engaging in any anti-competitive practices?
- What would be your preferred method of receiving information about and from the Competition Bureau?

- Are there any specific topics or details you would like to hear more about from the Competition Bureau? If yes, which ones and what would you like to know? How about on price structures or advertising?

### Conclusions

- This concludes what we need to cover. We really appreciate you taking the time to share your views. Your input is very important.
- In parting, do you have any final comments and/or advice for the Competition Bureau? Is there anything that you think I should have asked but didn't?

Thanks again and have a great day!

## Interview guide: Regulators and policymakers

Name:

Position:

Address/Phone number:

Date/Time:

Interview conducted by:

Thank you for agreeing to take part in this research project on behalf of the Competition Bureau Canada. Just as a reminder:

- The name of the firm the moderator works for, and the type of firm that employs them (i.e. an independent public opinion research firm).
- This interview is being conducted on behalf of the Government of Canada, in order to explore awareness of some programs and activities.
- We are interested in hearing your opinions; no attempt will be made to sell you anything or change your point of view.
- Your anonymity is guaranteed, and you will not be directly cited. In this regard, we encourage you to be as frank as possible.
- Role of interviewees: speak openly and frankly about opinions, remember that there are no right or wrong answers and no need to agree with each other
- An audio recording of the interview will be produced for research purposes. It will be used by the research professional to assist in preparing a report on the research findings and will be destroyed once the report is completed.
- While representatives of the Competition Bureau are not listening in to this call, we may share the recordings with them so they can hear your comments firsthand.
- All of your personally identifiable information (i.e. name, organization name, etc.) will be edited out of the recording.
- Your participation will provide important, unvarnished feedback, that they hope will help the Competition Bureau develop strategies for improving their advocacy efforts.
- Your input will be compiled into a report that will provide feedback to the Competition Bureau.
- The length of the interview is approximately 30 to 45 minutes.
- Are you comfortable with all of this before we begin?
- If you don't have any questions, I will dive into the questionnaire which is split into five sections:
  - Basic awareness and knowledge of the Competition Bureau
  - Understanding of the Competition Bureau's mandate and relevance
  - Awareness and impressions of the Competition Bureau's work
  - Behaviour modification and decision-making
  - Information needs

### Basic awareness and knowledge of the Competition Bureau

- Are you aware of any federal government agency or agencies dedicated to addressing issues related to pro-competitive regulations and policies? Yes No
  - [if yes] What are they?

- Are you aware of any federal government agency that is responsible for looking at false or misleading representations, price fixing, market allocation, bid-rigging, mergers and abuse of a dominant position? Yes No
  - [if yes] What are they? How effective do you think they are?
- How familiar would you say you are with the Competition Bureau and what it does? (Not at all familiar, Not very familiar, Somewhat familiar, Very familiar)
- What exactly is the role of the Competition Bureau?
- What sort of Bureau activities are you aware of, if any? [listen for enforcement, advocacy, outreach activities]
- What have you seen/read/heard in recent years?
- Have you ever contacted the Competition Bureau? Yes No
  - [if yes] How did you try to reach them? Which channel did you prefer? How would you describe your experience contacting the Competition Bureau?

### Understanding of the Competition Bureau's mandate and relevance

- How relevant, if at all, are each of the following Acts to the work you do:
  - The **Competition Act**? [if necessary: "The *Competition Act* is the federal law that governs most business conduct in Canada and aims to prevent anti-competitive market practices."]
  - The **Consumer Packaging and Labelling Act**? [if necessary: "The *Consumer Packaging and Labelling Act* is the criminal statute on packaging, labelling, sale, importation and advertising of prepackaged products."]
  - The **Textile Labelling Act**? [if necessary: "The *Textile Labelling Act* is the criminal statute on packaging, labelling, sale, importation and advertising of consumer textiles."]
  - The **Precious Metals Marking Act**? [if necessary: "*Precious Metals Marking Act* is the criminal statute on the marking of articles made with precious metals."]

Not at all relevant, Not very relevant, Somewhat relevant, Very relevant

- Did you know the Competition Bureau is responsible for enforcing each of these Acts? [probe for any that are relevant to work] Yes No
- How confident are you that you know all you need to know about these Acts?

Not at all confident, Not very confident, Somewhat confident, Very confident

- [for each relevant to work] How often do you seek out information related to that Act for the work you do? What is your general routine for doing that?
- Do you feel you know or can easily access all that you need to know about any of these Acts for the work you do? If you needed to learn more, what would you do?

### Awareness and impressions of the Competition Bureau's work

The Competition Bureau has a variety of initiatives it undertakes in each of three categories: Enforcement; Outreach; and Advocacy. Earlier, I asked you if you had recalled any. Now, I'd like to read you a list of examples in each category and find out whether you recall these, whether you knew they involved the Competition Bureau.



- Which of these examples of advocacy activities or initiatives have you heard about, and did you know they involved the Competition Bureau?
  - Reports, such as the report on Competition in Canada from 2000 to 2020
  - Competition advocacy on issues such as pet care regulations (more competitive choices for pet medication) and competition in Canada’s cannabis industry.
  - Retail grocery market study (a study of grocery competition).
  - Submissions and regulatory interventions such as those made to the Canadian Radio-Television and Telecommunications Commission (CRTC) on the wholesale high-speed access service framework.

Heard of: Yes No

Knew they involved the Competition Bureau: Yes No

- Which of these examples of enforcement activities, initiatives or news stories have you heard about and did you know they involved the Competition Bureau?
  - The bread price-fixing investigation, where there is an ongoing investigation into alleged price-fixing between producers to raise wholesale bread prices, as well as alleged price-fixing between grocery stores to raise retail prices. Canada Bread Company, Limited, a bread producer and distributor, was fined \$50 million after pleading guilty for its role in a criminal price-fixing arrangement.
  - The Competition Bureau’s attempt to seek a full-block of Rogers’ proposed acquisition of Shaw.
  - The Dufresne Group Inc. (TDG) and its affiliates agreed to pay \$3.25M to settle the Competition Bureau’s concerns over marketing claims. The investigation found that TDG offered certain products at inflated regular prices and then advertised them at big discounts, suggesting significant savings. In addition, they made marketing claims to consumers using sale end dates or countdown timers that gave the false or misleading impression that deals on certain items would no longer be available after a certain time, when this was not the case.
  - The Competition Bureau investigation that led to multiple criminal charges against Mr. Terry Croteau of Ontario alleging the use of deceptive telemarketing and false or misleading statements to get Canadian businesses to sign up for listings in online directories.
  - The Competition Bureau’s actions to stop unsubstantiated weight loss claims.
  - The Competition Bureau’s Gatineau bid-rigging case, where an engineering executive was accused in a bid-rigging scheme that bilked the City of Gatineau out of an estimated \$1.8 million.
  - The Competition Bureau’s challenge of Secure Energy Services’ acquisition of Tervita Corporation.
  - The Competition Bureau’s review of the merger between admixture system firms Sika AG and MBCC Group.

Heard of: Yes No

Knew they involved the Competition Bureau: Yes No

- Which of these examples of outreach activities, initiatives or news stories have you heard about and did you know they involved the Competition Bureau?

- Deceptive Marketing Practices Digest
- Enforcement guidance documents such as the Intellectual Property Enforcement Guidelines, Abuse of Dominance Guidelines, Merger Enforcement Guidelines
- Fraud Prevention Month campaign
- Little Black Book of Scams
- Consumer and Business Alerts
- The Competition Bureau's Compliance Hub or compliance presentations
- Presentations on bid-rigging
- Immunity and Leniency Programs

Heard of: Yes No

Knew they involved the Competition Bureau: Yes No

### Behaviour modification and decision-making

- When you are designing a regulatory framework or policy, do you consider competition and the need to ensure a competitive marketplace? If so, why? If not, why not?
- Is the term “innovation” relevant to the work you do? How do you define it in the context of your work? (Not at all relevant, Not very relevant, Somewhat relevant, Very relevant)
- Can you describe how innovation is relevant to or considered in the work you do? In what circumstances or cases does innovation need to be considered in your work?
- How valuable is innovation to the economy [if necessary: in your jurisdiction]?
  - [if relevant to work] For the work you do, do you feel like you know all that you need to know about innovation? Yes No
  - [if relevant to work] If you needed to know more, what would you do?
- How often, if at all, do you consult the work or people of the Competition Bureau in the course of your work?
  - [if they have] What are the kinds of circumstance in which you do this? How helpful to your work is the information provided by the Competition Bureau? What kind of impact, if any, does the work or people of the Competition Bureau have on your work? [probe for specifics or examples]
  - [if have not] Under what circumstances, if any, would you contact the Competition Bureau?
- Would you contact the Competition Bureau with concerns and/or questions related to innovation, competition, anti-competitive practices or any of these Acts?
- If you have questions or concerns about mass-marketing fraud, illegal pricing, potential monopolies forming, who do you contact?

### Information needs

- Can you think of any additional information you may want or need from the Competition Bureau in order to help you do your work in the future?
- When thinking about the Competition Bureau what types of information would you consider useful?
- What would be your preferred method of receiving information about and from the Competition Bureau?

### Conclusions

- This concludes what we need to cover. We really appreciate you taking the time to share your views. Your input is very important.
- In parting, do you have any final comments and/or advice for the Competition Bureau? Is there anything that you think I should have asked but didn't?

Thanks again and have a great day!

## Appendix D: Recruitment screeners

### Recruitment screener: Consumers

#### Focus group summary

| SMBs  | Consumers  |
|---|--|
| <ul style="list-style-type: none"> <li>Six (6) focus groups total</li> </ul>  | <ul style="list-style-type: none"> <li>Two (2) focus groups total</li> </ul>                                 |
| <ul style="list-style-type: none"> <li>Recruit 8 (for 4 to 6 to show) participants for each group</li> </ul>                                      | <ul style="list-style-type: none"> <li>Recruit 8 (for 5 to 6 to show) participants for each group</li> </ul> |
| <ul style="list-style-type: none"> <li>Mix of small (1-99 full time employees) and medium (100-499 full time employees) businesses (Q)</li> </ul> | <ul style="list-style-type: none"> <li>Mix of demographics (age, gender, income, ethnicity, etc.)</li> </ul> |
| <ul style="list-style-type: none"> <li>Good mix of industries/sectors (Q)</li> </ul>  |  |

| Group #                      | Audience  | Region          | Time  |
|------------------------------|-----------|-----------------|---|
| Tuesday, February 27, 2024   |           |                 |   |
| 1 (SC)                       | SMBs      | East in English | 4:00 pm ET/5:00 pm AT/5:30 pm NT                                  |
| 2 (SC)                       | SMBs      | East in French  | 6:00 pm ET/7:00 pm AT/7:30 pm NT                                  |
| 3 (DA)                       | SMBs      | East in English | 6:00 pm ET/7:00 pm AT/7:30 pm NT                                  |
| 4 (SC)                       | SMBs      | East in French  | 8:00 pm ET/9:00 pm AT/9:30 pm NT                                  |
| 5 (DA)                       | SMBs      | West in English | 8:00 pm ET/7:00 pm CT/6:00 pm MT/5:00 pm PT                       |
| Wednesday, February 28, 2024 |           |                 |   |
| 6 (SC)                       | Consumers | French          | 5:00 pm ET/6:00 pm AT/6:30 pm NT                                  |
| 7 (SC)                       | Consumers | English         | 7:00 pm ET/8:00 pm AT/8:30 pm NT/5:00 pm CT/5:00 pm MT/4:00 pm PT |
| 8 (DA)                       | SMBs      | West in English | 8:00 pm ET/7:00 pm CT/6:00 pm MT/5:00 pm PT                       |

Hello/Bonjour, this is \_\_\_\_\_ calling on behalf of Earnscliffe Strategies, a national public opinion research firm. Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais? [If French, continue in French or arrange a call back with a French interviewer: Nous vous rappellerons pour mener cette entrevue de recherche en Français. Merci. Au revoir].

We are organizing a series of discussion groups on issues of importance on behalf of the Government of Canada. We are looking for people who would be willing to participate in an online discussion group that will last up to 90 minutes. These people must be 18 years of age or older. Up to 8 participants will be taking part and for their time, participants will receive an honorarium of \$100. May I continue?

Yes [continue]  
 No [thank and terminate]

Your participation is voluntary and completely confidential. Your decision to participate or not will not affect any dealings you may have with the Government of Canada. We are interested in hearing your opinions; no attempt will be made to sell you anything or change your point of view. The format is a 'round table' discussion led by a research professional. All opinions expressed will remain anonymous and will be used for research purposes only in accordance

with laws designed to protect your privacy. All views will be grouped together to ensure no particular individual can be identified in any reporting for this research. But before we invite you to attend, we need to ask you a few questions to ensure that we get a good mix and variety of people. This will only take about 5 minutes. May I ask you a few questions?

Interviewer note: If a participant asks for information on this research they can be told: Earncliffe Strategy Group is located at 46 Elgin Street, Suite 400, Ottawa, ON K1P 5K6. Stephanie Constable, Principal is leading this project and can be reached at [613.563.4455].

If a participant asks for information on either Innovation, Science and Economic Development Canada or the Competition Bureau, they can be told: Innovation, Science and Economic Development Canada is located at 235 Queen Street, Ottawa, ON K1A 0H5. For questions related to this survey, you can contact the departmental research team by email at [publicopinionresearch-recherchesurlopionpublique@ised-isde.gc.ca](mailto:publicopinionresearch-recherchesurlopionpublique@ised-isde.gc.ca)

Yes [continue]  
No [thank and terminate]

**Monitoring text:**

[read to all]: “This call may be monitored or audio taped for quality control and evaluation purposes.”

[additional clarification if needed]:

To ensure that I (the interviewer) am reading the questions correctly and collecting your answers accurately;

To assess my (the interviewer) work for performance evaluation;

To ensure that the questionnaire is accurate/correct (i.e. evaluation of programming and methodology – we’re asking the right questions to meet our clients’ research requirements – kind of like pre-testing)

If the call is recorded, it is only for the purposes of playback to the interviewer for a performance evaluation immediately after the interview is conducted or it can be used by the Project Manager to evaluate the questionnaire if they are unavailable at the time of the interview – all audio tapes are destroyed after the evaluation.

1. Do you or does anyone in your immediate family or household work in any of the following areas?

- A public opinion or marketing research firm
- A magazine or newspaper, online or print
- A radio or television station
- A public relations company
- An advertising agency or graphic design firm
- An online media company or as a blog writer
- The government, whether federal, provincial or municipal
- A political party

[if “yes” to any of the above, thank and terminate]

2. Which of the following age categories do you fall into? Are you...? [ensure good mix]

|                      |    |                       |
|----------------------|----|-----------------------|
| Under 18 years       | 1  | [thank and terminate] |
| 18-24 years          | 2  |                       |
| 25-34 years          | 3  |                       |
| 35-44 years          | 4  |                       |
| 45-54 years          | 5  |                       |
| 55-64 years          | 6  |                       |
| 65-74 years          | 7  |                       |
| 75 years and older   | 8  |                       |
| Prefer not to answer | 99 | [thank and terminate] |

3. How do you identify yourself? [Do not read] [Gender refers to current gender which may be different from sex assigned at birth (male or female) and may be different from what is indicated on legal documents.]

|                                 |   |
|---------------------------------|---|
| Male gender                     | 1 |
| Female gender                   | 2 |
| Gender diverse                  | 3 |
| Don't know/Prefer not to answer | 9 |

4. What is your current employment status?

|                      |   |                         |
|----------------------|---|-------------------------|
| Working full-time    | 1 | [ensure good mix]       |
| Working part-time    | 2 |                         |
| Self-employed        | 3 |                         |
| Retired              | 4 |                         |
| Unemployed           | 5 | } [maximum 1 per group] |
| Student              | 6 |                         |
| Other                | 7 |                         |
| Prefer not to answer | 9 |                         |

5. [If employed/retired] What is/was your current/past occupation?

\_\_\_\_\_ please specify

6. Which of the following categories best describes your total household income; that is, the total income of all persons in your household combined, before taxes? [read list] [ensure good mix]

|                                 |   |                       |
|---------------------------------|---|-----------------------|
| Under \$20,000                  | 1 |                       |
| \$20,000 to under \$40,000      | 2 |                       |
| \$40,000 to under \$60,000      | 3 |                       |
| \$60,000 to under \$80,000      | 4 |                       |
| \$80,000 to under \$100,000     | 5 |                       |
| \$100,000 to under \$150,000    | 6 |                       |
| \$150,000 or more               | 7 |                       |
| Don't know/Prefer not to answer | 9 | [thank and terminate] |

7. What is the last level of education that you have completed? [ensure good mix]

- |                                 |   |                       |
|---------------------------------|---|-----------------------|
| Some high school or less        | 1 |                       |
| Completed high school           | 2 |                       |
| Some college/university         | 3 |                       |
| Completed college/university    | 4 |                       |
| Post-graduate studies           | 5 |                       |
| Don't know/Prefer not to answer | 9 | [thank and terminate] |

8. What is your racial and/or ethnic background? [select all that apply] [ensure good mix as best possible]

- |   |   |
|---|---|
| Black (African, Afro-Caribbean, African-Canadian descent)                           | 1 |
| East Asian (Chinese, Korean, Japanese, Taiwanese descent)                           | 2 |
| Indigenous (First Nations, Inuit, Métis)  | 3 |
| Latin American (Hispanic descent)   | 4 |
| Middle Eastern (West Asian or North African descent<br>(Afghan, Egyptian, Iranian)) | 5 |
| South Asian (Indian, Pakistani, Sri Lankan, Indo-Caribbean descent)                 | 6 |
| Southeast Asian (Filipino, Vietnamese, Cambodian, Thai descent)                     | 7 |
| White (European descent)  | 8 |
| Prefer not to answer  | 9 |

This research will require participating in a video call online.

9. Do you have access to a computer, smartphone or tablet with high-speed internet which will allow you to participate in an online discussion group?

- |     |                       |
|-----|-----------------------|
| Yes | [continue]            |
| No  | [thank and terminate] |

10. Does your computer/smartphone/tablet have a camera that will allow you to be visible to the moderator and other participants as part of an online discussion group?

- |     |                       |
|-----|-----------------------|
| Yes | [continue]            |
| No  | [thank and terminate] |

11. Do you have a personal email address that is currently active and available to you?

- |     |                                 |
|-----|---------------------------------|
| Yes | [continue, please record email] |
| No  | [thank and terminate]           |

12. Have you participated in a discussion or focus group before? A discussion group brings together a few people in order to know their opinion about a given subject.

- |                                 |   |                       |
|---------------------------------|---|-----------------------|
| Yes                             | 1 | [max 4 per audience]  |
| No                              | 2 | [skip to q15]         |
| Don't know/Prefer not to answer | 9 | [thank and terminate] |

13. When was the last time you attended a discussion or focus group?

- |                                 |   |                       |
|---------------------------------|---|-----------------------|
| If within the last 6 months     | 1 | [thank and terminate] |
| If not within the last 6 months | 2 | [continue]            |
| Don't know/Prefer not to answer | 9 | [thank and terminate] |

14. How many of these sessions have you attended in the last five years?

- |                                 |   |                       |
|---------------------------------|---|-----------------------|
| If 4 or less                    | 1 | [continue]            |
| If 5 or more                    | 2 | [thank and terminate] |
| Don't know/Prefer not to answer | 9 | [thank and terminate] |

### Invitation

15. Participants in discussion groups are asked to voice their opinions and thoughts. How comfortable are you in voicing your opinions in front of others? Are you...? [read list]

- |                        |   |                       |
|------------------------|---|-----------------------|
| Very comfortable       | 1 | [minimum 4 per group] |
| Fairly comfortable     | 2 | [continue]            |
| Comfortable            | 3 | [continue]            |
| Not very comfortable   | 4 | [thank and terminate] |
| Not at all comfortable | 5 | [thank and terminate] |
| DK/NR                  | 9 | [thank and terminate] |

16. Sometimes participants are asked to read text, review images, or type out answers during the discussion. Is there any reason why you could not participate?

- |       |   |                       |
|-------|---|-----------------------|
| Yes   | 1 | [continue]            |
| No    | 2 | [skip to q19]         |
| DK/NR | 9 | [thank and terminate] |

17. Is there anything we could do to facilitate your participation?

- |       |   |                       |
|-------|---|-----------------------|
| Yes   | 1 | [continue]            |
| No    | 2 | [thank and terminate] |
| DK/NR | 9 | [thank and terminate] |

18. What specifically? [open end]

[interviewer to note for potential one-on-one interview]

19. Based on your responses, it looks like you have the profile we are looking for. I would like to invite you to participate in a small group discussion, called an online focus group, we are conducting at [time], on [date]

As you may know, focus groups are used to gather information on a particular subject matter. The discussion will consist of about 8 people and will be very informal.



It will last up to 90 minutes and you will receive \$100 as a thank you for your time. Would you be willing to attend?

|                                 |   |                       |
|---------------------------------|---|-----------------------|
| Yes                             | 1 | [recruit]             |
| No                              | 2 | [thank and terminate] |
| Don't know/Prefer not to answer | 9 | [thank and terminate] |

## Privacy questions

Now I have a few questions that relate to privacy, your personal information and the research process. We will need your consent on a few issues that enable us to conduct our research. As I run through these questions, please feel free to ask me any questions you would like clarified.

P1) First, we will be providing a list of interviewees' names and profiles (screener responses shared today) to the interviewer so that they can ensure they are speaking with the right individual. Do we have your permission to do this? I assure you it will be kept strictly confidential.

|     |   |             |
|-----|---|-------------|
| Yes | 1 | [continue]  |
| No  | 2 | [go to p1a] |

We need to provide the names and profiles of interviewees (screener responses shared today) because only the individuals invited are allowed to be interviewed and this information is necessary for verification purposes. Please be assured that this information will be kept strictly confidential. [go to p1a]

P1a) Now that I've explained this, do I have your permission to provide your name and profile to the discussion group moderator?

|     |   |                     |
|-----|---|---------------------|
| Yes | 1 | [continue]          |
| No  | 2 | [thank & terminate] |

P2) A recording (video and audio) of the group discussion will be produced for research purposes. The recordings will be used by the research professional to assist in preparing a report on the research findings and creating transcripts (if applicable). Once the research reports are finalized, all recordings will be destroyed.

Do you agree to be recorded (video and audio) for research and reporting purposes only?

|     |   |  |
|-----|---|--|
| Yes | 1 | [continue]                               |
| No  | 2 | [read respondent info below & go to p2a] |

It is necessary for the research process for us to record (video and audio) the session as the researchers need this material to complete the report.

P2a) Now that I've explained this, do I have your permission for recording?

|     |   |                     |
|-----|---|---------------------|
| Yes | 1 | [continue]          |
| No  | 2 | [thank & terminate] |

P3) A small number of researchers from the Government of Canada may be online to observe the groups.

Do you agree to be observed by Government of Canada employees?

Yes                    1            [continue]  
 No                     2            [go to p3a]

P3A) It is standard qualitative procedure to invite clients, in this case, Government of Canada employees, to observe the online. They will be there simply to hear your opinions first hand although they may take their own notes and confer with the moderator on occasion to discuss whether there are any additional questions to ask the group.

Do you agree to be observed by Government of Canada employees?

Yes                    1            [continue]  
 No                     2            [thank and terminate]

Wonderful, you qualify to participate in one of our discussion sessions. As I mentioned earlier, the group discussion will take place on [date] at [time] for up to 90 minutes.

Focus group schedule by audience and region

| Group #                      | Audience  | Region          | Time  |
|------------------------------|-----------|-----------------|---|
| Tuesday, February 27, 2024   |           |                 |   |
| 1 (SC)                       | SMBs      | East in English | 4:00 pm ET/5:00 pm AT/5:30 pm NT                                  |
| 2 (SC)                       | SMBs      | East in French  | 6:00 pm ET/7:00 pm AT/7:30 pm NT                                  |
| 3 (DA)                       | SMBs      | East in English | 6:00 pm ET/7:00 pm AT/7:30 pm NT                                  |
| 4 (SC)                       | SMBs      | East in French  | 8:00 pm ET/6:00 pm CT/6:00 pm MT/5:00 pm PT                       |
| 5 (DA)                       | SMBs      | West in English | 8:00 pm ET/7:00 pm CT/6:00 pm MT/5:00 pm PT                       |
| Wednesday, February 28, 2024 |           |                 |   |
| 6 (SC)                       | Consumers | French          | 5:00 pm ET/6:00 pm AT/6:30 pm NT                                  |
| 7 (SC)                       | Consumers | English         | 7:00 pm ET/8:00 pm AT/8:30 pm NT/5:00 pm CT/5:00 pm MT/4:00 pm PT |
| 8 (DA)                       | SMBs      | West in English | 8:00 pm ET/7:00 pm CT/6:00 pm MT/5:00 pm PT                       |

Can I please confirm your email address so that we can send you the link to the online discussion group?

As we are only inviting a small number of people, your participation is very important to us. If for some reason you are unable to attend, and because you are prohibited from sending a replacement on your behalf, please call us so that we may get someone to replace you. You can reach us at [insert phone number] at our office. Please ask for [name]. Someone will call you in the days leading up to the discussion to remind you.

So that we can call you to remind you about the interview, send you any information or resources in advance, or contact you should there be any changes, can you please confirm your name and contact information for me?

First name  
Last Name  
Email  
Cell phone number  
Other phone number

If the respondent refuses to give his/her first or last name, email or phone number please assure them that this information will be kept strictly confidential in accordance with the privacy law and that it is used strictly to contact them to confirm their attendance and to inform them of any changes to the discussion group. If they still refuse thank and terminate.

Thank you very much. We will contact you a couple of days before the session to confirm your attendance.

## Recruitment screener: SMBs

### Focus group summary

| SMBs  | Consumers  |
|---|--|
| <ul style="list-style-type: none"> <li>Six (6) focus groups total</li> </ul>  | <ul style="list-style-type: none"> <li>Two (2) focus groups total</li> </ul>                                 |
| <ul style="list-style-type: none"> <li>Recruit 8 (for 4 to 6 to show) participants for each group</li> </ul>                                  | <ul style="list-style-type: none"> <li>Recruit 8 (for 5 to 6 to show) participants for each group</li> </ul> |
| <ul style="list-style-type: none"> <li>Mix of small (1-99 full time employees) and medium (100-499 full time employees) businesses</li> </ul> | <ul style="list-style-type: none"> <li>Mix of demographics (age, gender, income, ethnicity, etc.)</li> </ul> |
| <ul style="list-style-type: none"> <li>Good mix of industries/sectors</li> </ul>  |  |

| Group #                      | Audience  | Region          | Time  |
|------------------------------|-----------|-----------------|---|
| Tuesday, February 27, 2024   |           |                 |   |
| 1 (SC)                       | SMBs      | East in English | 4:00 pm ET/5:00 pm AT/5:30 pm NT                                  |
| 2 (SC)                       | SMBs      | East in French  | 6:00 pm ET/7:00 pm AT/7:30 pm NT                                  |
| 3 (DA)                       | SMBs      | East in English | 6:00 pm ET/7:00 pm AT/7:30 pm NT                                  |
| 4 (SC)                       | SMBs      | East in French  | 8:00 pm ET/9:00 pm AT/9:30 pm NT                                  |
| 5 (DA)                       | SMBs      | West in English | 8:00 pm ET/7:00 pm CT/6:00 pm MT/5:00 pm PT                       |
| Wednesday, February 28, 2024 |           |                 |   |
| 6 (SC)                       | Consumers | French          | 5:00 pm ET/6:00 pm AT/6:30 pm NT                                  |
| 7 (SC)                       | Consumers | English         | 7:00 pm ET/8:00 pm AT/8:30 pm NT/5:00 pm CT/5:00 pm MT/4:00 pm PT |
| 8 (DA)                       | SMBs      | West in English | 8:00 pm ET/7:00 pm CT/6:00 pm MT/5:00 pm PT                       |

Hello/Bonjour, this is \_\_\_\_\_ calling on behalf of Earncliffe Strategies, a national public opinion research firm. Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais? [If French, continue in French or arrange a call back with a French interviewer: Nous vous rappellerons pour mener cette entrevue de recherche en Français. Merci. Au revoir].

From time to time, we solicit opinions by talking with people. We are preparing to conduct a series of these discussions on behalf of the Government of Canada and I would like to speak to the individual in your organization who plays an important role in the day to day operations and makes decisions on the direction of the company including for issues such as marketing, pricing, advertising, packaging, labelling, ensuring the company satisfies legal or regulatory requirements, etc. For these discussion groups, we are looking for decision-makers and working level employees within firms/businesses. Decision-makers are defined as executive-level decision-makers, primary decision-makers and individuals in key roles (i.e., who influence decision-makers). Examples of these participants are CEOs, Owners, Vice-Presidents, Chief Officers, senior management, etc.).

Is there a person available who fits that description? As we would like to speak to the most senior level decision maker possible, please bear in mind this is often the owner or President of your company.

Interviewer note: once appropriate contact has been reached – repeat intro if needed and continue:

We are reaching out to you today to invite you to a group discussion to share your feedback on the opportunities and challenges your business faces and the kind of role you expect the Government of Canada to play in relation to these. The session will last up to 90 minutes and participants will receive an honorarium of \$350 for their time.

Other decision makers from small and medium sized companies located in Canada will be taking part in this research. It is a first-name basis only discussion so nobody, including the Government of Canada will know the companies being represented.

Participation is voluntary and completely confidential. Your decision to participate or not will not affect any dealings you may have with the Government of Canada. We are interested in hearing your opinions; no attempt will be made to sell you anything or change your point of view. The format will be an online discussion led by a research professional. All opinions expressed will remain anonymous and will be used for research purposes only in accordance with laws designed to protect your privacy. All views will be grouped together to ensure no particular individual can be identified in any reporting for this research. But before we invite you to attend, we need to ask you a few questions to ensure that we get a good mix and variety of people. This will only take about 10 minutes. May I ask you a few questions?

Interviewer note: If a participant asks for information on this research they can be told: Earncliffe Strategy Group is located at 46 Elgin Street, Suite 400, Ottawa, ON K1P 5K6. Stephanie Constable, Principal is leading this project and can be reached at [613.563.4455].

If a participant asks for information on either Innovation, Science and Economic Development Canada or the Competition Bureau, they can be told: Innovation, Science and Economic Development Canada is located at 235 Queen Street, Ottawa, ON K1A 0H5. For questions related to this survey, you can contact the departmental research team by email at [publicopinionresearch-recherchesurlopinionpublique@ised-isde.gc.ca](mailto:publicopinionresearch-recherchesurlopinionpublique@ised-isde.gc.ca)

Yes [continue]  
No [thank and terminate]

**Monitoring text:**

[read to all]: “This call may be monitored or audio taped for quality control and evaluation purposes.”

[additional clarification if needed]:

To ensure that I (the interviewer) am reading the questions correctly and collecting your answers accurately;

To assess my (the interviewer) work for performance evaluation;

To ensure that the questionnaire is accurate/correct (i.e. evaluation of programming and methodology – we’re asking the right questions to meet our clients’ research requirements – kind of like pre-testing)

If the call is recorded, it is only for the purposes of playback to the interviewer for a performance evaluation immediately after the interview is conducted or it can be used by the Project Manager to evaluate the questionnaire if they are unavailable at the time of the interview – all audio tapes are destroyed after the evaluation.

1. Can you please provide me with your job title?

2. Are you the owner or manager of this company?

|     |   |
|-----|---|
| Yes | 1 |
| No  | 2 |

3. [If yes] How many years have you owned or managed this company?

|                                 |   |
|---------------------------------|---|
| Record number of years          | 1 |
| Don't know/Prefer not to answer | 2 |

4. Do you provide legal counsel to or serve as a corporate lawyer (advise on competition or business law) for your company?

|                                 |   |                             |
|---------------------------------|---|-----------------------------|
| Yes                             | 1 | [not more than 1 per group] |
| No                              | 2 |                             |
| Don't know/Prefer not to answer | 9 |                             |

5. Has your company ever dealt with the Competition Bureau Canada (the Bureau) in any capacity, including for issues affecting the direction of your company? [If participant asks: The Competition Bureau is a federal institution that is a part of Innovation, Science and Economic Development Canada. It is an independent law enforcement agency that ensures Canadian businesses and consumers prosper in a competitive and innovative marketplace.] [ensure good mix]

|                                 |   |            |
|---------------------------------|---|------------|
| Yes                             | 1 | [continue] |
| No                              | 2 | [go to Q7] |
| Don't know/Prefer not to answer | 9 |            |

[If asked by recruits: You do not have to have had direct dealings with the Bureau to participate in the group.]

6. Just out of curiosity, to the best of your knowledge, what was the nature of your dealings with the Bureau? For example, did your interaction concern a merger review, written opinion application, investigation, compliance or other type of presentation, information request, etc.

[Interviewer note: Read: Information that you provide will be used only for the purpose of the study and will not be used for the purpose of advancing any of the Competition Bureau's investigations or inquiries.]

\_\_\_\_\_ [open end]

7. How familiar are you with your company's views regarding issues such as marketing, pricing, advertising, packaging, labelling, ensuring the company satisfies legal and regulatory requirements, etc.? Would you say you are.... [read options]

|                   |   |
|-------------------|---|
| Very familiar     | 1 |
| Somewhat familiar | 2 |

|                                 |   |
|---------------------------------|---|
| Not very familiar               | 3 |
| Not at all familiar             | 4 |
| Don't know/Prefer not to answer | 9 |

8. [If not very familiar or not at all familiar] Since this will be one of the themes discussed, is there someone else in your company who would be more familiar with these issues?

|     |   |   |
|-----|---|---|
| Yes | 1 | [Ask to speak with that person and return to beginning] |
| No  | 2 | Thank and terminate                                     |

9. Approximately, how many full-time employees (FTE) does your company currently employ in Canada? [Record actual number]

|            |   |                       |
|------------|---|-----------------------|
| 1 to 99    | 1 | [Small business]      |
| 100 to 499 | 2 | [Medium business]     |
| 500+       | 3 | [thank and terminate] |

[Focus groups with SMBs are only among small and medium businesses. Ensure at least 2/8 are medium businesses. Small businesses can include sole proprietorships, micro-businesses, and professionals, etc.]

10. Is your company incorporated?

|                                 |   |                       |
|---------------------------------|---|-----------------------|
| Yes                             | 1 | [continue]            |
| No                              | 2 | [thank and terminate] |
| Don't know/Prefer not to answer | 9 | [thank and terminate] |

11. Which of the following best describes the industry or sector your company operates in? 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. Ensure good mix.]

|  |    |
|--|----|
| Construction                                 | 1  |
| Manufacturing                                | 2  |
| Retail                                       | 3  |
| Agriculture, forestry or fisheries           | 4  |
| Mining, oil and gas extraction               | 5  |
| Finance, insurance or real estate            | 6  |
| High tech                                    | 7  |
| Sales  | 8  |
| Telecommunications                           | 9  |
| Utilities                                    | 10 |
| Engineering                                  | 11 |
| Waste management                             | 12 |
| Healthcare and social assistance             | 13 |
| Transportation                               | 14 |
| Wholesale trade                              | 15 |
| Hospitality, accommodation and food services | 16 |
| Non-profit/not-for-profit organizations      | 17 |
| Remediation/Other services                   | 18 |
| Arts, entertainment, and recreation          | 19 |

|   |    |                       |
|---|----|-----------------------|
| Professional, scientific and technical services | 20 |                       |
| Education                                       | 21 |                       |
| Emergency services/public safety/security       | 22 |                       |
| Legal/Law                                       | 23 |                       |
| Other (please specify)                          | 88 |                       |
| Don't know/Prefer not to answer                 | 99 | [thank and terminate] |

[Please try to ensure at least one participant is recruited from each industry sector across all of the SMB groups. Otherwise, please aim to recruit the majority of participants in Sectors 1-12.]

12. Which of the following age categories do you fall in to? Are you...? [ensure good mix]

|                      |    |                       |
|----------------------|----|-----------------------|
| Under 18 years       | 1  | [thank and terminate] |
| 18-24 years          | 2  |                       |
| 25-34 years          | 3  |                       |
| 35-44 years          | 4  |                       |
| 45-54 years          | 5  |                       |
| 55-64 years          | 6  |                       |
| 65-74 years          | 7  |                       |
| 75 years and older   | 8  |                       |
| Prefer not to answer | 99 | [thank and terminate] |

13. How do you identify yourself? [Do not read] [Gender refers to current gender which may be different from sex assigned at birth (male or female) and may be different from what is indicated on legal documents.

|                                 |   |
|---------------------------------|---|
| Male gender                     | 1 |
| Female gender                   | 2 |
| Gender diverse                  | 3 |
| Don't know/Prefer not to answer | 9 |

14. What is your racial and/or ethnic background? [select all that apply] [ensure good mix as best possible]

|  |   |
|--|---|
| Black (African, Afro-Caribbean, African-Canadian descent)                          | 1 |
| East Asian (Chinese, Korean, Japanese, Taiwanese descent)                          | 2 |
| Indigenous (First Nations, Inuit, Métis)   | 3 |
| Latin American (Hispanic descent)  | 4 |
| Middle Eastern (West Asian or North African descent<br>(Afghan, Egyptian, Iranian) | 5 |
| South Asian (Indian, Pakistani, Sri Lankan, Indo-Caribbean descent)                | 6 |
| Southeast Asian (Filipino, Vietnamese, Cambodian, Thai descent)                    | 7 |
| White (European descent)   | 8 |
| Prefer not to answer   | 9 |

This research will require participating in a video call online.



15. Do you have access to a computer, smartphone or tablet with high-speed internet which will allow you to participate in an online discussion group?

Yes [continue]  
 No [thank and terminate]

16. Does your computer/smartphone/tablet have a camera that will allow you to be visible to the moderator and other participants as part of an online discussion group?

Yes [continue]  
 No [thank and terminate]

17. Do you have a personal email address that is currently active and available to you?

Yes [continue, please record email]  
 No [thank and terminate]

18. Have you participated in a discussion or focus group before? A discussion group brings together a few people in order to know their opinion about a given subject.

Yes 1 [max 4 per audience]  
 No 2 [skip to q21]  
 Don't know/Prefer not to answer 9 [thank and terminate]

19. When was the last time you attended a discussion or focus group?

If within the last 6 months 1 [thank and terminate]  
 If not within the last 6 months 2 [continue]  
 Don't know/Prefer not to answer 9 [thank and terminate]

20. How many of these sessions have you attended in the last five years?

If 4 or less 1 [continue]  
 If 5 or more 2 [thank and terminate]  
 Don't know/Prefer not to answer 9 [thank and terminate]

### Invitation

21. Participants in discussion groups are asked to voice their opinions and thoughts. How comfortable are you in voicing your opinions in front of others? Are you...? [read list]

Very comfortable 1 [minimum 4 per group]  
 Fairly comfortable 2 [continue]  
 Comfortable 3 [continue]  
 Not very comfortable 4 [thank and terminate]  
 Not at all comfortable 5 [thank and terminate]  
 DK/NR 9 [thank and terminate]

22. Sometimes participants are asked to read text, review images, or type out answers during the discussion. Is there any reason why you could not participate?

- |       |   |                       |
|-------|---|-----------------------|
| Yes   | 1 | [continue]            |
| No    | 2 | [skip to q25]         |
| DK/NR | 9 | [thank and terminate] |

23. Is there anything we could do to facilitate your participation?

- |       |   |                       |
|-------|---|-----------------------|
| Yes   | 1 | [continue]            |
| No    | 2 | [thank and terminate] |
| DK/NR | 9 | [thank and terminate] |

24. What specifically? [open end]

[interviewer to note for potential one-on-one interview]

25. Based on your responses, it looks like you have the profile we are looking for. I would like to invite you to participate in a small group discussion, called an online focus group, we are conducting at [time], on [date]

As you may know, focus groups are used to gather information on a particular subject matter. The discussion will consist of about 8 people and will be very informal.

It will last up to 90 minutes and you will receive \$350 as a thank you for your time. Would you be willing to attend?

- |                                 |   |                       |
|---------------------------------|---|-----------------------|
| Yes                             | 1 | [recruit]             |
| No                              | 2 | [thank and terminate] |
| Don't know/Prefer not to answer | 9 | [thank and terminate] |

## Privacy questions

Now I have a few questions that relate to privacy, your personal information and the research process. We will need your consent on a few issues that enable us to conduct our research. As I run through these questions, please feel free to ask me any questions you would like clarified.

P1) First, we will be providing a list of interviewees' names and profiles (screener responses shared today) to the interviewer so that they can ensure they are speaking with the right individual. Do we have your permission to do this? I assure you it will be kept strictly confidential.

- |     |   |             |
|-----|---|-------------|
| Yes | 1 | [continue]  |
| No  | 2 | [go to p1a] |

We need to provide the names and profiles of interviewees (screener responses shared today) because only the individuals invited are allowed to be interviewed and this information is necessary for verification purposes. Please be assured that this information will be kept strictly confidential. [go to p1a]

P1a) Now that I've explained this, do I have your permission to provide your name and profile to the interviewer?

- Yes                    1            [continue]
- No                    2            [thank & terminate]

P2) A recording (video and audio) of the group discussion will be produced for research purposes. The recordings will be used by the research professional to assist in preparing a report on the research findings. Once the research reports are finalized, all recordings will be destroyed.

Do you agree to be recorded (video and audio) for research and reporting purposes only?

- Yes                    1            [continue]
- No                    2            [read respondent info below & go to p2a]

It is necessary for the research process for us to record (video and audio) the session as the researchers need this material to complete the report.

P2a) Now that I've explained this, do I have your permission for recording?

- Yes                    1            [continue]
- No                    2            [thank & terminate]

Wonderful, you qualify to participate in one of our discussion sessions. As I mentioned earlier, the group discussion will take place on [date] at [time] for up to 90 minutes.

Focus group schedule by audience and region

| Group #                      | Audience  | Region          | Time  |
|------------------------------|-----------|-----------------|---|
| Tuesday, February 27, 2024   |           |                 |   |
| 1 (SC)                       | SMBs      | East in English | 4:00 pm ET/5:00 pm AT/5:30 pm NT                                  |
| 2 (SC)                       | SMBs      | East in French  | 6:00 pm ET/7:00 pm AT/7:30 pm NT                                  |
| 3 (DA)                       | SMBs      | East in English | 6:00 pm ET/7:00 pm AT/7:30 pm NT                                  |
| 4 (SC)                       | SMBs      | East in French  | 8:00 pm ET/6:00 pm CT/6:00 pm MT/5:00 pm PT                       |
| 5 (DA)                       | SMBs      | West in English | 8:00 pm ET/7:00 pm CT/6:00 pm MT/5:00 pm PT                       |
| Wednesday, February 28, 2024 |           |                 |   |
| 6 (SC)                       | Consumers | French          | 5:00 pm ET/6:00 pm AT/6:30 pm NT                                  |
| 7 (SC)                       | Consumers | English         | 7:00 pm ET/8:00 pm AT/8:30 pm NT/5:00 pm CT/5:00 pm MT/4:00 pm PT |
| 8 (DA)                       | SMBs      | West in English | 8:00 pm ET/7:00 pm CT/6:00 pm MT/5:00 pm PT                       |

Can I please confirm your email address so that we can send you the link to the online discussion group?

As we are only inviting a small number of people, your participation is very important to us. If for some reason you are unable to attend, and because you are prohibited from sending a replacement on your behalf, please call us so that we may get someone to replace you. You can reach us at [insert phone number] at our office. Please ask for [name]. Someone will call you in the days leading up to the discussion to remind you.

So that we can call you to remind you about the interview, send you any information or resources in advance, or contact you should there be any changes, can you please confirm your name and contact information for me?

First name

Last Name

Email

Cell phone number

Other phone number

If the respondent refuses to give his/her first or last name, email or phone number please assure them that this information will be kept strictly confidential in accordance with the privacy law and that it is used strictly to contact them to confirm their attendance and to inform them of any changes to the discussion group. If they still refuse thank and terminate.

Thank you very much. We will contact you a couple of days before the session to confirm your attendance.

## Recruitment screener: Global multinationals

### In-depth interview summary

| Global multinationals   |
|---|
| <ul style="list-style-type: none"> <li>• Seven (7) interviews total</li> </ul>  |
| <ul style="list-style-type: none"> <li>• Good mix of small (1-99 full time employees), medium (100-499 full time employees), and large (500+) businesses</li> </ul> |
| <ul style="list-style-type: none"> <li>• Good mix of industries/sectors</li> </ul>  |

| Group #  | Audience | Region | Time |
|--|----------|--------|------|
| Monday, February 26, 2024 – Friday, March 8, 2024                            |          |        |      |
| Interviews are up to 40 minutes in duration. Schedule for one-hour intervals |          |        |      |

Hello/Bonjour, this is \_\_\_\_\_ calling on behalf of Earncliffe Strategies, a national public opinion research firm. Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais? [If French, continue in French or arrange a call back with a French interviewer: Nous vous rappellerons pour mener cette entrevue de recherche en Français. Merci. Au revoir].

From time to time, we solicit opinions by talking with people. We are preparing to conduct a series of these discussions on behalf of the Government of Canada and I would like to speak to the individual in your organization who plays an important role in the day to day operations and makes decisions on the direction of the company including for issues such as marketing, pricing, advertising, packaging, labelling, ensuring the company satisfies legal or regulatory requirements, etc. For these individual interviews, we are looking for decision-makers and working level employees within firms/businesses. Decision-makers are defined as executive-level decision-makers, primary decision-makers and individuals in key roles (i.e., who influence decision-makers). Examples of these participants are CEOs, Owners, Vice-Presidents, Chief Officers, senior management, etc.).

Is there a person available who fits that description? As we would like to speak to the most senior level decision maker possible, please bear in mind this is often the owner or President of your company.

Interviewer note: Once appropriate contact has been reached – repeat intro if needed and continue:

We are reaching out to you today to invite you to share your feedback, one-on-one, on the opportunities and challenges your business faces and the kind of role you expect the Government of Canada to play in relation to these. The session will last 30 to 40 minutes and participants will receive an honorarium of \$350 for their time.

Other decision makers from global multinationals will be taking part in this research. It is a first-name basis only discussion so nobody, including the Government of Canada will know the companies being represented.

Your participation is voluntary and completely confidential. Your decision to participate or not will not affect any dealings you may have with the Government of Canada. We are interested in hearing your opinions; no attempt will be made to sell you anything or change your point of view. The format will be an online discussion led by a research professional. All opinions expressed will remain anonymous and will be used for research purposes only in accordance with laws designed to protect your privacy. All views will be grouped together to ensure no particular individual can be identified in any reporting for this research. But before we invite you to attend, we need to ask you a few questions to ensure that we get a good mix and variety of people. This will only take about 10 minutes. May I ask you a few questions?

Interviewer note: If a participant asks for information on this research they can be told: Earncliffe Strategy Group is located at 46 Elgin Street, Suite 400, Ottawa, ON K1P 5K6. Stephanie Constable, Principal is leading this project and can be reached at [613.563.4455].

If a participant asks for information on either Innovation, Science and Economic Development Canada or the Competition Bureau, they can be told: Innovation, Science and Economic Development Canada is located at 235 Queen Street, Ottawa, ON K1A 0H5. For questions related to this survey, you can contact the departmental research team by email at [publicopinionresearch-recherchesurlopinionpublique@ised-isde.gc.ca](mailto:publicopinionresearch-recherchesurlopinionpublique@ised-isde.gc.ca)

Yes [continue]  
No [thank and terminate]

**Monitoring text:**

[read to all]: “This call may be monitored or audio taped for quality control and evaluation purposes.”

[additional clarification if needed]:

To ensure that I (the interviewer) am reading the questions correctly and collecting your answers accurately;

To assess my (the interviewer) work for performance evaluation;

To ensure that the questionnaire is accurate/correct (i.e. evaluation of programming and methodology – we’re asking the right questions to meet our clients’ research requirements – kind of like pre-testing)

If the call is recorded, it is only for the purposes of playback to the interviewer for a performance evaluation immediately after the interview is conducted or it can be used by the Project Manager to evaluate the questionnaire if they are unavailable at the time of the interview – all audio tapes are destroyed after the evaluation.

1. Can you please provide me with your job title?
2. Are you the owner or manager of this company?

Yes 1  
No 2

3. [If yes] How many years have you owned or managed this company?

|                                 |   |
|---------------------------------|---|
| Record number of years          | 1 |
| Don't know/Prefer not to answer | 2 |

4. Do you provide legal counsel to or serve as a corporate lawyer (advise on competition or business law) for your company?

|                                 |   |                   |
|---------------------------------|---|-------------------|
| Yes                             | 1 | [not more than 1] |
| No                              | 2 |                   |
| Don't know/Prefer not to answer | 9 |                   |

5. Has your company ever dealt with the Competition Bureau Canada (the Bureau) in any capacity, including for issues affecting the direction of your company? [If participant asks: The Competition Bureau is a federal institution that is a part of Innovation, Science and Economic Development Canada. It is an independent law enforcement agency that ensures Canadian businesses and consumers prosper in a competitive and innovative marketplace.] [Ensure good mix]

|                                 |   |            |
|---------------------------------|---|------------|
| Yes                             | 1 | [continue] |
| No                              | 2 | [go to Q7] |
| Don't know/Prefer not to answer | 9 |            |

[If asked by recruits: You do not have to have had direct dealings with the Bureau to participate in the interview.]

6. Just out of curiosity, to the best of your knowledge, what was the nature of your dealings with the Bureau? For example, did your interaction concern a merger review, written opinion application, investigation, compliance or other type of presentation, information request, etc.

[Interviewer note: Read: Information that you provide will be used only for the purpose of the study and will not be used for the purpose of advancing any of the Competition Bureau's investigations or inquiries.

\_\_\_\_\_ [open end]

7. How familiar are you with your company's views regarding issues such as marketing, pricing, advertising, packaging, labelling, ensuring the company satisfies legal and regulatory requirements, etc.? Would you say you are.... [read options]

|                                 |   |
|---------------------------------|---|
| Very familiar                   | 1 |
| Somewhat familiar               | 2 |
| Not very familiar               | 3 |
| Not at all familiar             | 4 |
| Don't know/Prefer not to answer | 9 |

8. [If not very familiar or not at all familiar] Since this will be one of the themes discussed, is there someone else in your company who would be more familiar with these issues?

- |     |   |   |
|-----|---|---|
| Yes | 1 | [Ask to speak with that person and return to beginning] |
| No  | 2 | Thank and terminate                                     |

9. Approximately, how many full-time employees (FTE) does your company currently employ in Canada? [Record actual number]

- |                                 |   |                     |
|---------------------------------|---|---------------------|
| 1 to 99                         | 1 | Small business      |
| 100 to 499                      | 2 | Medium business     |
| 500+                            | 3 | Large business      |
| Don't know/Prefer not to answer | 9 | Thank and terminate |

[Ensure a good mix. Small businesses can include sole proprietorships, micro-business, and professionals, etc.]

10. Is your company incorporated?

- |                                 |   |                       |
|---------------------------------|---|-----------------------|
| Yes                             | 1 | [continue]            |
| No                              | 2 | [thank and terminate] |
| Don't know/Prefer not to answer | 9 | [thank and terminate] |

11. Do you work for a company that operates in at least two countries other than the home country?

- |                                 |   |                     |
|---------------------------------|---|---------------------|
| Yes                             | 1 | Continue            |
| No                              | 2 | Thank and terminate |
| Don't know/Prefer not to answer | 9 | Thank and terminate |

12. Which of the following best describes the industry or sector your company operates in? 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. Ensure good mix.]

- |                                    |    |
|------------------------------------|----|
| Construction                       | 1  |
| Manufacturing                      | 2  |
| Retail                             | 3  |
| Agriculture, forestry or fisheries | 4  |
| Mining, oil and gas extraction     | 5  |
| Finance, insurance or real estate  | 6  |
| High tech                          | 7  |
| Sales                              | 8  |
| Telecommunications                 | 9  |
| Utilities                          | 10 |
| Engineering                        | 11 |
| Waste management                   | 12 |
| Healthcare and social assistance   | 13 |
| Transportation                     | 14 |
| Wholesale trade                    | 15 |



|   |    |                       |
|---|----|-----------------------|
| Hospitality, accommodation and food services    | 16 |                       |
| Non-profit/not-for-profit organizations         | 17 |                       |
| Remediation/Other services                      | 18 |                       |
| Arts, entertainment, and recreation             | 19 |                       |
| Professional, scientific and technical services | 20 |                       |
| Education                                       | 21 |                       |
| Emergency services/public safety/security       | 22 |                       |
| Legal/Law                                       | 23 |                       |
| Other (please specify)                          | 88 |                       |
| Don't know/Prefer not to answer                 | 99 | [thank and terminate] |

[Please aim to recruit the majority of interviewees in Sectors 1-12.]

13. How do you identify yourself? [Do not read] [Gender refers to current gender which may be different from sex assigned at birth (male or female) and may be different from what is indicated on legal documents.

|                                 |   |
|---------------------------------|---|
| Male gender                     | 1 |
| Female gender                   | 2 |
| Gender diverse                  | 3 |
| Don't know/Prefer not to answer | 9 |

14. What is your racial and/or ethnic background? [select all that apply] [ensure good mix as best possible]

|  |   |
|--|---|
| Black (African, Afro-Caribbean, African-Canadian descent)                          | 1 |
| East Asian (Chinese, Korean, Japanese, Taiwanese descent)                          | 2 |
| Indigenous (First Nations, Inuit, Métis)   | 3 |
| Latin American (Hispanic descent)  | 4 |
| Middle Eastern (West Asian or North African descent<br>(Afghan, Egyptian, Iranian) | 5 |
| South Asian (Indian, Pakistani, Sri Lankan, Indo-Caribbean descent)                | 6 |
| Southeast Asian (Filipino, Vietnamese, Cambodian, Thai descent)                    | 7 |
| White (European descent)   | 8 |
| Prefer not to answer   | 9 |

This research will require participating in an online video call.

15. Do you have access to a computer, smartphone or tablet with high-speed internet which will allow you to participate in an interview?

|     |                       |
|-----|-----------------------|
| Yes | [continue]            |
| No  | [thank and terminate] |

16. Does your computer/smartphone/tablet have a camera that will allow you to be visible to the interviewer?

|     |                       |
|-----|-----------------------|
| Yes | [continue]            |
| No  | [thank and terminate] |

17. Do you have a personal email address that is currently active and available to you?

- Yes [continue, please record email]
- No [thank and terminate]

18. Have you participated in a discussion or focus group before? A discussion group brings together a few people in order to know their opinion about a given subject.

- Yes 1 [max 4 per audience]
- No 2 [skip to q22]
- Don't know/Prefer not to answer 9 [thank and terminate]

19. When was the last time you attended a discussion or focus group?

- If within the last 6 months 1 [thank and terminate]
- If not within the last 6 months 2 [continue]
- Don't know/Prefer not to answer 9 [thank and terminate]

20. How many of these sessions have you attended in the last five years?

- If 4 or less 1 [continue]
- If 5 or more 2 [thank and terminate]
- Don't know/Prefer not to answer 9 [thank and terminate]

### Invitation

21. Participants in discussion groups are asked to voice their opinions and thoughts. How comfortable are you in voicing your opinions in front of others? Are you...? [read list]

- Very comfortable 1 [minimum 4 per group]
- Fairly comfortable 2 [continue]
- Comfortable 3 [continue]
- Not very comfortable 4 [thank and terminate]
- Not at all comfortable 5 [thank and terminate]
- DK/NR 9 [thank and terminate]

22. Sometimes participants are asked to read text, review images, or type out answers during the discussion. Is there any reason why you could not participate?

- Yes 1 [continue]
- No 2 [skip to q25]
- DK/NR 9 [thank and terminate]

23. Is there anything we could do to facilitate your participation?

- Yes 1 [continue]
- No 2 [thank and terminate]
- DK/NR 9 [thank and terminate]

24. What specifically? [open end]

[interviewer to note for potential one-on-one interview]

25. Based on your responses, it looks like you have the profile we are looking for. I would like to invite you to participate to an interview that will take place via conference call. It will last between 30 and 40 minutes. Would you be available on [date] @ [time]? Participants will receive \$350.00 for their time.

|                                 |   |                       |
|---------------------------------|---|-----------------------|
| Yes                             | 1 | [recruit]             |
| No                              | 2 | [thank and terminate] |
| Don't know/Prefer not to answer | 9 | [thank and terminate] |

### Privacy questions

Now I have a few questions that relate to privacy, your personal information and the research process. We will need your consent on a few issues that enable us to conduct our research. As I run through these questions, please feel free to ask me any questions you would like clarified.

P1) First, we will be providing a list of interviewees' names and profiles (screener responses shared today) to the interviewer so that they can ensure they are speaking with the right individual. Do we have your permission to do this? I assure you it will be kept strictly confidential.

|     |   |             |
|-----|---|-------------|
| Yes | 1 | [continue]  |
| No  | 2 | [go to p1a] |

We need to provide the names and profiles of interviewees (screener responses shared today) because only the individuals invited are allowed to be interviewed and this information is necessary for verification purposes. Please be assured that this information will be kept strictly confidential. [go to p1a]

P1a) Now that I've explained this, do I have your permission to provide your name and profile to the interviewer?

|     |   |                     |
|-----|---|---------------------|
| Yes | 1 | [continue]          |
| No  | 2 | [thank & terminate] |

P2) An audio recording of the interview will be produced for research purposes. The recordings will be used by the research professional to assist in preparing a report on the research findings and will be destroyed once the report is completed.

Do you agree to be audio recorded for research and reporting purposes only?

|     |   |  |
|-----|---|--|
| Yes | 1 | [continue]                               |
| No  | 2 | [read respondent info below & go to p2a] |

It is necessary for the research process for us to audio record the session as the researcher needs this material to complete the report.

P2a) Now that I've explained this, do I have your permission for audiotaping?

- Yes                    1            [continue]
- No                     2            [thank & terminate]

Wonderful, you qualify to participate in one of our interviews. As I mentioned earlier, the interview will take place on [date] at [time] for up to 30 to 40 minutes.

| Group #  | Audience | Region | Time |
|--|----------|--------|------|
| Monday, February 26, 2024 – Friday, March 8, 2024                            |          |        |      |
| Interviews are up to 40 minutes in duration. Schedule for one-hour intervals |          |        |      |

Can I please confirm your email address so that we can send you the link to the online discussion group?

As we are only inviting a small number of people, your participation is very important to us. If for some reason you are unable to make this appointment, and because you are prohibited from sending a replacement on your behalf, please call us so that we can reschedule. You can reach us at **[insert phone number]** at our office. Please ask for **[name]**. Someone will call you in the days leading up to the interview to remind you.

So that we can call you to remind you about the interview, send you any information or resources in advance, or contact you should there be any changes, can you please confirm your name and contact information for me?

- First name
- Last Name
- Email
- Cell phone number
- Other phone number

If the respondent refuses to give his/her first or last name, email or phone number please assure them that this information will be kept strictly confidential in accordance with the privacy law and that it is used strictly to contact them to confirm their attendance and to inform them of any changes to the discussion group. If they still refuse thank and terminate.

Thank you very much. We will contact you a couple of days before the session to confirm your attendance.

## Appendix E: Quantitative methodology report

### Survey methodology

Earnscliffe's overall approach for this study was to conduct a survey of 1,480 individuals, 15 minutes in length. Of the 1,472 respondents, 1,034 were Canadians 18 and older, 407 were decision-makers at small and medium businesses (SMBs) (including 48 global multinationals), and 21 were policymakers or regulators. The surveys were conducted online, with the exception of an additional 10 decision-makers in global multinationals conducted by telephone. While we originally intended to conduct all the interviews with decision-makers at multinational companies by telephone, data collection proceeded extremely slowly and achieving 30 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 quantitative analysis and that was consistent with previous waves of this study.

### Questionnaire design

The questionnaires for this study were designed by Earnscliffe in consultation with ISED and provided for fielding to Leger. The surveys were offered in both English and French and completed based on their preferences.

### Sample design and selection

The sample for the Canadian consumers and business executives (both SMBs and global multinationals) were drawn from Leger's opt-in panel. These participants are recruited from multiple online and offline sources and every attempt is made to ensure they are reflective of the general population by region, age and gender and the business population in terms of region, size, sector, etc.

The sample of regulators and policymakers was drawn from a list provided by the Bureau. The list included regulators and policymakers at the federal, provincial, territorial and municipal levels.

### Data collection

The surveys were conducted in English and French, and the field dates for each audience were as follows:

Consumers (online): February 27 to March 11, 2024

SMBs (online): March 18 to 20, 2024

Global multinationals (telephone): February 26 to March 21, 2024

Regulators and policymakers (online): March 4 to 19, 2024

## Targets/Weighting

The final sample of consumers was weighted to reflect the Canadian population of 18+ based on gender, age, and region. The sample of SMB was weighted based on the distribution of small and medium-sized businesses by number of employees, as per Statistics Canada's Canadian Business Counts, with employees. The data for the regulators and policymakers was not weighted.

## Quality controls

Leger conducted a soft-launch pre-test of the survey, and Earncliffe reviewed the data to ensure that all skip patterns were working and that all respondents were completing the survey in an appropriate amount of time.

## Results

### Consumers

#### Final dispositions – Online

A total of 10,703 individuals entered the online survey, of which 1,034 qualified as valid and completed the survey. The response rate for this survey was 7.5%.

|                          |        |
|--------------------------|--------|
| Total entered survey     | 10,703 |
| Completed                | 1,034  |
| Not qualified/screen out | 116    |
| Over quota               | 7,138  |
| Suspend/drop-off         | 2,415  |

|  |        |
|--|--------|
| Unresolved (U)                                 | 12,782 |
| Email invitation bounce-backs                  | 17     |
| Email invitations unanswered                   | 12,765 |
| In-scope non-responding (IS)                   | N/A    |
| Qualified respondent break-off                 | N/A    |
| In-scope responding (R)                        | 1044   |
| Completed surveys disqualified – quota filled  | N/A    |
| Completed surveys disqualified – other reasons | 10     |
| Completed surveys – valid                      | 1,034  |
| Response rate = $R/(U+IS+R)$                   | 7.50%  |

## Businesses – SMBs and global multinationals

### Final dispositions – Telephone (global multinationals)

A total of 3269 individuals were reached out, of which n=10 qualified as valid and completed the survey. The response rate for this survey was 10.5%.

|                           | Landline |
|---------------------------|----------|
| Total entered survey:     | 3269     |
| Completed:                | 10       |
| Not qualified/screen out: | 720      |
| Over quota:               | N/A      |
| Suspend/drop-off:         | 2539     |

|  |        |
|--|--------|
| Unresolved (U)                                 | 935    |
| Email invitation bounce-backs                  | N/A    |
| Email invitations unanswered/Invalid numbers   | 935    |
| In-scope non-responding (IS)                   | N/A    |
| Qualified respondent break-off                 | N/A    |
| In-scope responding (R)                        | 10     |
| Completed surveys disqualified – quota filled  | N/A    |
| Completed surveys disqualified – other reasons | N/A    |
| Completed surveys – valid                      | 10     |
| Response rate = $R/(U+IS+R)$                   | 10.50% |

### Final dispositions – Online (SMBs refilled)

A total of 10,703 individuals entered the online survey, of which 1034 qualified as valid and completed the survey. The response rate for this survey was 7.5%.

|                           |       |
|---------------------------|-------|
| Total entered survey:     | 1,753 |
| Completed:                | 407   |
| Not qualified/screen out: | 627   |
| Over quota:               | 306   |
| Suspend/drop-off:         | 413   |

|  |        |
|--|--------|
| Unresolved (U)                                 | 12,782 |
| Email invitation bounce-backs                  | 72     |
| Email invitations unanswered                   | 10,633 |
| In-scope non-responding (IS)                   | N/A    |
| Qualified respondent break-off                 | N/A    |
| In-scope responding (R)                        | 409    |
| Completed surveys disqualified – quota filled  | N/A    |
| Completed surveys disqualified – other reasons | 2      |
| Completed surveys – valid                      | 407    |
| Response rate = $R/(U+IS+R)$                   | 3.10%  |

## Regulators and policymakers

### Final dispositions – Online

A total of 64 individuals entered the online survey, of which 21 qualified as valid and completed the survey. The response rate for this survey was 8.9%.

|                          |     |
|--------------------------|-----|
| Total entered survey     | 64  |
| Completed                | 21  |
| Not Qualified/Screen out | N/A |
| Over quota               | N/A |
| Suspend/Drop-off         | 43  |

|  |       |
|--|-------|
| Unresolved (U)                                 | 649   |
| Email invitation bounce-backs                  | 43    |
| Email invitations unanswered                   | 606   |
| In-scope non-responding (IS)                   | N/A   |
| Qualified respondent break-off                 | N/A   |
| In-scope responding (R)                        | 21    |
| Completed surveys disqualified – quota filled  | N/A   |
| Completed surveys disqualified – other reasons | N/A   |
| Completed surveys – valid                      | 21    |
| Response rate = $R/(U+IS+R)$                   | 3.13% |

### Nonresponse

Any survey that is conducted is potentially subject to bias or error. The possibility of non-response bias exists within the current sample.

Respondents for the online survey were selected from among those who have volunteered to participate in online surveys by joining an online opt-in panel. The notion of non-response is more complex than for random probability studies that begin with a sample universe that can, at least theoretically, include the entire population being studied. In such cases, non-response can occur at a number of points before being invited to participate in this particular survey, let alone in deciding to answer any particular question within the survey.

The telephone portion of this survey would not include members of the population who do not have access to a telephone or who are not capable of responding to a survey in either English or French. In addition, some groups within the population are systemically less likely to answer surveys.

Finally, only those included in the list of regulators and policymakers provided by the Bureau had a chance to take the survey. There are likely other regulators and policymakers that the Bureau did not identify who may have been capable of answering the survey but were excluded from the sample list.



## Sample profile: consumers; unweighted vs. weighted distribution

| Region                | Unweighted sample | Weighted sample |
|-----------------------|-------------------|-----------------|
| Atlantic              | 72                | 70              |
| Quebec                | 234               | 239             |
| Ontario               | 387               | 400             |
| Manitoba/Saskatchewan | 67                | 64              |
| Alberta               | 121               | 115             |
| British Columbia      | 153               | 144             |

| Gender | Unweighted sample | Weighted sample |
|--------|-------------------|-----------------|
| Female | 531               | 530             |
| Male   | 493               | 495             |

| Age     | Unweighted sample | Weighted sample |
|---------|-------------------|-----------------|
| 18 - 34 | 276               | 288             |
| 35 – 54 | 344               | 333             |
| 55+     | 402               | 425             |

| Household income                | Unweighted sample | Weighted sample |
|---------------------------------|-------------------|-----------------|
| Under \$40,000                  | 213               | 216             |
| \$40,000 to just under \$80,000 | 289               | 292             |
| \$80,000 and above              | 439               | 432             |

| Employment       | Unweighted sample | Weighted sample |
|------------------|-------------------|-----------------|
| Full-time        | 432               | 422             |
| Part-time        | 82                | 82              |
| Self-employed    | 63                | 63              |
| Student          | 71                | 64              |
| Retired          | 54                | 53              |
| Not in workforce | 278               | 297             |

## Sample profile: SMBs; unweighted vs. weighted distribution

| Region   | Unweighted sample | Weighted sample |
|----------|-------------------|-----------------|
| Atlantic | 40                | 28              |
| Quebec   | 184               | 85              |
| Ontario  | 156               | 152             |

|                       |    |    |
|-----------------------|----|----|
| Manitoba/Saskatchewan | 34 | 26 |
| Alberta               | 54 | 53 |
| British Columbia      | 49 | 64 |

| Size          | Unweighted sample | Weighted sample |
|---------------|-------------------|-----------------|
| 1-4 employees | 68                | 224             |
| 5-99          | 270               | 175             |
| 100-499       | 69                | 8               |

| Industry  | Unweighted sample | Weighted sample |
|---|-------------------|-----------------|
| Agriculture, forestry, fishing and hunting                            | 15                | 15              |
| Mining, quarrying, and oil and gas extraction                         | 5                 | 7               |
| Utilities   | 14                | 12              |
| Construction  | 25                | 22              |
| Manufacturing   | 38                | 29              |
| Wholesale trade   | 11                | 13              |
| Retail trade  | 36                | 49              |
| Transportation and warehousing  | 10                | 8               |
| Information and cultural industries                                   | 7                 | 6               |
| Finance and insurance   | 24                | 21              |
| Real estate and rental and leasing                                    | 14                | 13              |
| Professional, scientific and technical services                       | 40                | 44              |
| Management of companies and enterprises                               | 4                 | 2               |
| Administrative and support, waste management and remediation services | 3                 | 1               |
| Educational services  | 20                | 21              |
| Health care and social assistance                                     | 18                | 23              |
| Arts, entertainment and recreation                                    | 24                | 45              |
| Accommodation and food services                                       | 16                | 13              |
| Other services (except public administration)                         | 17                | 9               |
| Public administration   | 5                 | 1               |

## Margin of error

Respondents for the online survey were selected from among those who have volunteered to participate/registered to participate in online surveys. The data have been weighted to reflect the demographic composition of the Canadian population and, in the case of the SMB respondents, the makeup of businesses in Canada based on size. Because the sample is based on those who initially self-selected for participation in the panel, no estimates of sampling error can be calculated. The treatment here of the non-probability sample is aligned with the Standards for the Conduct of Government of Canada Public Opinion Research for online surveys.

## Survey duration

The average online survey duration for the Consumers was 13 minutes.

The average online survey duration for the SMBs was 14 minutes.

The average telephone survey duration for the global multinationals was 11 minutes.

The average online survey duration for the regulators and policymakers was 17 minutes.

## Appendix F: Questionnaires

### Questionnaire: Consumers

#### Email invitation

LA VERSION FRANÇAISE SUIT.

Welcome and thank you for your participation in this study. Earnscliffe Strategy Group, in collaboration with Leger Marketing, has been hired to administer an online survey on behalf of the Government of Canada on marketplace issues that affect consumers. The results to surveys like this help the Government of Canada continue and improve its work.

This online survey will take about 10 minutes to complete. Your participation in the study is voluntary. All your answers will remain anonymous. They will be combined with responses from all other respondents to ensure no particular individual can be identified in any reporting for this research. As a token of our appreciation for your participation, you will receive [insert reward]. If you have any questions about this survey, please email [publicopinionresearch-recherchesurlopinionpublique@ised-isde.gc.ca](mailto:publicopinionresearch-recherchesurlopinionpublique@ised-isde.gc.ca) or if you encounter any difficulties, please email [research@earnsccliffe.ca](mailto:research@earnsccliffe.ca).

To begin, click on the link below.  
[URL]

Alternativement, pour continuer en français, veuillez cliquer sur [INSÉRER LE LIEN].

#### Landing page

Welcome and thank you for your participation in this study. Earnscliffe Strategy Group, in collaboration with Leger, has been hired to administer an online survey on behalf of the Government of Canada on marketplace issues that affect consumers. The results to surveys like this help the Government of Canada continue and improve its work.

#### How does the online survey work?

- You are being asked to offer your opinions and experiences through an online survey.
- We anticipate that the survey will take 10 minutes to complete.
- Your participation in the survey is completely voluntary.
- Your decision on whether or not to participate will not affect any dealings you may have with the Government of Canada.

#### What about your personal information?

1. The personal information you provide is governed in accordance with the Privacy Act and is being collected in accordance with the Treasury Board Directive on Privacy Practices. We only collect the information we need to conduct the research project.
2. **Purpose of collection:** We require your personal information such as demographic information to better understand the topic of the research. However, your responses are always combined with the responses of others for analysis and reporting; you will never be identified.

3. **For more information:** This personal information collection is described in the standard personal information bank Public Communications – PSU 914, in Info Source, available online at [infosource.gc.ca](http://infosource.gc.ca).
4. **Your rights under the Privacy Act:** In addition to protecting your personal information, the Privacy Act gives you the right to request access to and correction of your personal information. You also have the right to file a complaint with the Privacy Commissioner of Canada if you think your personal information has been handled improperly.

### What happens after the online survey?

The final report written by Earncliffe Strategies will be available to the public from Library and Archives Canada six months after the end of fieldwork.

If you have any questions about the survey, you may contact Earncliffe Strategies at [research@earncliffe.ca](mailto:research@earncliffe.ca).

Your input is greatly appreciated, and we look forward to receiving your feedback.

Do you wish to continue?

Yes

No [TERMINATE]

### Section 1: Screening

1. Please indicate your gender.

|                      |   |
|----------------------|---|
| Male gender          | 1 |
| Female gender        | 2 |
| Gender diverse       | 3 |
| Prefer not to answer | 9 |

2. Please indicate your age in years.

|  |   |
|--|---|
| Under 18 [THANK & TERMINATE]             |   |
| 18-24 years                              | 1 |
| 25-34 years                              | 2 |
| 35-44 years                              | 3 |
| 45-54 years                              | 4 |
| 55-64 years                              | 5 |
| 65-74 years                              | 7 |
| 75 years or older                        | 8 |
| Prefer not to answer [THANK & TERMINATE] | 9 |

3. Which of the following provinces or territories do you live in?

|                           |   |
|---------------------------|---|
| Newfoundland and Labrador | 1 |
| Nova Scotia               | 2 |
| Prince Edward Island      | 3 |

|                                       |    |
|---------------------------------------|----|
| New Brunswick                         | 4  |
| Quebec                                | 5  |
| Ontario                               | 6  |
| Manitoba                              | 7  |
| Saskatchewan                          | 8  |
| Alberta                               | 9  |
| British Columbia                      | 10 |
| Yukon                                 | 11 |
| Nunavut                               | 12 |
| Northwest Territories                 | 13 |
| Prefer not to say [THANK & TERMINATE] | 99 |

## Section 2: Awareness & Perceptions of Laws

4. Can you name the organization responsible for enforcing federal competition laws and labelling laws (except as it relates to food products)?

[OPEN-END.]

Please indicate how aware you are of these activities. Please use a scale from 1 to 5 where 1 means “Not at all aware” and 5 means “Very aware.” [RANDOMIZE]

5. Price-fixing, bid-rigging, collusion
6. Misleading advertising and deceptive marketing practices
7. Mass-marketing fraud
8. Abuse of dominance (monopolization)
9. Consumer packaging and textile labelling, and marking of precious metals
10. Mergers and acquisitions
11. Wage fixing and no-poaching agreements

|                      |   |
|----------------------|---|
| Not at all aware     | 1 |
| 2                    | 2 |
| 3                    | 3 |
| 4                    | 4 |
| Very aware           | 5 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

Below is a list of Canadian laws. Please indicate how familiar you are with each of them. Please use a scale from 1 to 5 where 1 means “Not at all familiar” and 5 means “Very familiar.” [RANDOMIZE]

12. A federal law called the *Competition Act* that governs most business conduct in Canada, with the purpose of maintaining and encouraging competition in the Canadian economy and ensuring consumers have access to competitive prices and product choices

13. A federal law called the *Consumer Packaging and Labelling Act* that requires that prepackaged consumer products (except food products) have accurate and meaningful labelling information
14. A federal law called the *Textile Labelling Act* that requires that textile articles, such as clothing, have accurate and meaningful labelling information
15. A federal law called the *Precious Metals Marking Act* that covers the requirements for the marking of precious metals such as gold and silver

|                      |   |
|----------------------|---|
| Not at all familiar  | 1 |
| 2                    | 2 |
| 3                    | 3 |
| 4                    | 4 |
| Very familiar        | 5 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

### Section 3: Basic Awareness & Impressions of the Competition Bureau

16. How familiar are you with the Competition Bureau? Please use a scale from 1 to 5 where 1 means “Not at all familiar” and 5 means “Very familiar.”

|                      |   |
|----------------------|---|
| Not at all familiar  | 1 |
| 2                    | 2 |
| 3                    | 3 |
| 4                    | 4 |
| Very familiar        | 5 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

The Competition Bureau is an independent law enforcement agency that protects and promotes competition for the benefit of Canadian consumers and businesses. It investigates anti-competitive activities, protects consumers and promotes competitive markets.

17. Which statement best reflects your knowledge of the Competition Bureau before completing this survey?

|  |   |
|--|---|
| This was already my understanding of the Competition Bureau          | 1 |
| This adds to what I already knew of the Competition Bureau           | 2 |
| I did not know about the Competition Bureau before doing this survey | 3 |
| Don't know   | 8 |
| Prefer not to answer   | 9 |

18. Over the past year, how clearly do you recall seeing or hearing anything about the Competition Bureau?

|  |   |
|--|---|
| Clearly recall seeing or hearing something | 3 |
| Vaguely recall seeing or hearing something | 2 |

|  |   |
|--|---|
| Do not recall seeing or hearing anything | 1 |
| Don't know                               | 8 |
| Prefer not to answer                     | 9 |

#### Section 4: Awareness of the Work of the Competition Bureau

19. Below is a list of cases pursued by the Competition Bureau. For each of the following, please indicate if you recall hearing about it. Please select all that apply. [RANDOMIZE. ACCEPT ALL.]

The bread price-fixing investigation, where there is an ongoing investigation into alleged price-fixing between producers to raise wholesale bread prices, as well as alleged price-fixing between grocery stores to raise retail prices. Canada Bread Company, Limited, a bread producer and distributor, was fined \$50 million after pleading guilty for its role in a criminal price-fixing arrangement

The Competition Bureau's attempt to seek a full-block of Rogers' proposed acquisition of Shaw

The Dufresne Group Inc. (TDG) and its affiliates agreed to pay \$3.25M to settle the Competition Bureau's concerns over marketing claims regarding advertising of big discounts which were in reality discounts being applied to prices that were listed as much higher than the normal price, as well as giving consumers false or misleading impression that deals on certain items would no longer be available after a certain time

The Competition Bureau investigation that led to multiple criminal charges against Mr. Terry Croteau of Ontario alleging the use of deceptive telemarketing and false or misleading statements to get Canadian businesses to sign up for listings in online directories

The Competition Bureau's Gatineau bid-rigging case, where an engineering executive was accused in a bid-rigging scheme that bilked the City of Gatineau out of an estimated \$1.8 million.

The Competition Bureau's actions to stop unsubstantiated weight loss claims

The Competition Bureau's challenge of Secure Energy Services' acquisition of Tervita Corporation

The Competition Bureau's review of the merger between admixture system firms Sika AG and MBCC Group

All of them

None of them

Don't know

Prefer not to answer

88

99

20. Below is a list of activities and publications by the Competition Bureau. For each of the following, please indicate if you recall hearing about it. Please select all that apply. [RANDOMIZE. ACCEPT ALL.]

The annual Fraud Prevention Month campaign

The Competition Bureau's publication to help Canadians identify and protect themselves against scams called the Little Black Book of Scams

The Competition Bureau's Consumer alerts, such as alert warnings about "greenwashing" and cryptocurrency investment fraud



|   |   |
|---|---|
| The Competition Bureau’s submissions to the Canadian Radio-Television and Telecommunications Commission (CRTC) on mobile wireless services  |   |
| The Competition Bureau’s market studies, such as the retail grocery market study  |   |
| The Competition Bureau’s report on competitive intensity in Canada from 2000-2020   |   |
| The dedicated telephone tip line and online form to accept anonymous tips from Canadians who suspect fraud, collusion or corruption in federal government contracts and real estate property agreements |   |
| The Competition Bureau’s efforts to communicate in plain language   |   |
| The Competition Bureau’s online complaint form where you can notify the Competition Bureau if you believe that a company or individuals have participated in anti-competitive activity                  |   |
| All of them   |   |
| None of them  |   |
| Don’t know  | 8 |
| Prefer not to answer  | 9 |

21. Below is a list of Competition Bureau activities and publications. Please indicate the ones, if any, that are of interest to you. Please select all that apply. [ACCEPT ALL. FIX “All of them” AND “None of them”.]

|  |    |
|--|----|
| The Competition Bureau’s <i>Deceptive Marketing Practices Digest</i> – a publication that offers advice and presents the Bureau’s perspective on advertising and marketing practices | 1  |
| The <i>Little Black Book of Scams</i> – a publication with tips to help consumers and businesses recognize and report scams in Canada  | 2  |
| Updates on the Competition Bureau’s major enforcement cases  | 3  |
| The Competition Bureau’s Consumer alerts – alerts with information for consumers about deceptive marketing practices, misleading advertising and scams                               | 4  |
| The annual Fraud Prevention Month Campaign to help Canadians recognize, reject and report fraud  | 5  |
| The Competition Bureau’s submissions to the Canadian Radio-Television and Telecommunications Commission (CRTC) on telecommunications services  | 6  |
| The Competition Bureau’s competition promotion work, such as its market studies, submissions to government consultations, summits, and open letters to regulators and policymakers   | 7  |
| All of them  | 8  |
| None of them   | 0  |
| Don’t know   | 98 |
| Prefer not to answer   | 99 |

22. Using the list below, please indicate the ones, if any, that have had an impact on your behaviour as a consumer. Please select all that apply. [SAME ORDER AS ABOVE. ACCEPT ALL. ADD “All of them” AND “None of them”.]

|  |   |
|--|---|
| The Competition Bureau’s <i>Deceptive Marketing Practices Digest</i> – a publication that offers advice and presents the Bureau’s perspective on advertising and marketing practices | 1 |
| The <i>Little Black Book of Scams</i> – a publication with tips to help consumers and businesses recognize and report scams in Canada  | 2 |
| Updates on the Competition Bureau’s major enforcement cases  | 3 |
| The Competition Bureau’s Consumer alerts – alerts with information for consumers about   |   |

|  |    |
|--|----|
| deceptive marketing practices, misleading advertising and scams  | 4  |
| The annual Fraud Prevention Month Campaign to help Canadians recognize, reject and report fraud  | 5  |
| The Competition Bureau’s submissions to the Canadian Radio-Television and Telecommunications Commission (CRTC) on telecommunications services                                      | 6  |
| The Competition Bureau’s competition promotion work, such as its market studies, submissions to government consultations, summits, and open letters to regulators and policymakers | 7  |
| All of them  | 8  |
| None of them   | 0  |
| Don’t know   | 88 |
| Prefer not to answer   | 99 |

[IF AT LEAST ONE ITEM SELECTED] You indicated that each of the following have had an impact on your behaviour as a consumer. For each, please indicate what type of impact it had using the drop-down menu provided. [PIPE IN ONLY EACH ITEM SELECTED. USE DROP-DOWN MENU FOR RESPONSE.]

23. The Competition Bureau’s Deceptive Marketing Practices Digest – a publication that offers
24. advice and presents the Bureau’s perspective on advertising and marketing practices
25. The Little Black Book of Scams – a publication with tips to help consumers and businesses
26. recognize and report scams in Canada
27. Updates on the Competition Bureau’s major enforcement cases
28. The Competition Bureau’s Consumer alerts – alerts with information for consumers about deceptive marketing practices, misleading advertising, and scams
29. The annual Fraud Prevention Month Campaign to help Canadians recognize, reject and report fraud
30. The Competition Bureau’s submissions to the Canadian Radio-Television and Telecommunications Commission (CRTC) on telecommunications services
31. The Competition Bureau’s competition promotion work, such as its market studies, submissions to government consultations, summits, and open letters to regulators and policymakers

|   |    |
|---|----|
| I changed my purchasing behaviour   | 1  |
| I have more information to protect myself against harmful activities such as fraud and scams  | 2  |
| I visited the Competition Bureau’s website for more information   | 3  |
| I did not do anything, but I have more knowledge on anti-competitive activity   | 4  |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 5  |
| I contacted the Canadian Anti-Fraud Centre  | 6  |
| I filed a complaint with the RCMP or local police   | 7  |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 8  |
| I filed a complaint with the Better Business Bureau   | 9  |
| Other [SPECIFY]   | 77 |
| Don’t know  | 88 |
| Prefer not to answer  | 99 |

32. After reviewing this list of Competition Bureau activities and publications, how would you describe your impression of the Competition Bureau?

|                       |   |
|-----------------------|---|
| Very unfavourable     | 1 |
| Somewhat unfavourable | 2 |
| Neither               | 3 |
| Somewhat favourable   | 4 |
| Very favourable       | 5 |
| Don't know            | 8 |
| Prefer not to answer  | 9 |

In your opinion, how is the Competition Bureau doing at each of the following? [RANDOMIZE]

- 33. Enforcing laws against anti-competitive behaviour, such as price-fixing and misleading advertising and deceptive marketing practices
- 34. Providing Canadian consumers with Consumer alerts containing useful information on deceptive marketing practices, misleading advertising and scams
- 35. Publishing the outcomes of the investigations the Competition Bureau has completed
- 36. Educating consumers on how to protect themselves against harmful activities such as fraud and scams
- 37. Educating Canadians on how to recognize anti-competitive behaviour, such as price-fixing and misleading advertising and deceptive marketing practices
- 38. Educating Canadians on how to report suspected anti-competitive activity to the Competition Bureau

|                         |   |
|-------------------------|---|
| Very poorly             | 1 |
| Poorly                  | 2 |
| Neither well nor poorly | 3 |
| Well                    | 4 |
| Very well               | 5 |
| Don't know              | 8 |
| Prefer not to answer    | 9 |

39. Of the same list of roles it performs, please indicate which should be the Competition Bureau's highest priority, in your opinion. [RANDOMIZE]

|   |   |
|---|---|
| Enforcing laws against anti-competitive behaviour, such as price-fixing and misleading advertising and deceptive marketing practices                  |   |
| Providing Canadian consumers with Consumer alerts containing useful information on deceptive marketing practices, misleading advertising and scams    |   |
| Publishing the outcomes of the investigations the Competition Bureau has completed  |   |
| Educating consumers on how to protect themselves against harmful activities such as fraud and scams   |   |
| Educating Canadians on how to recognize anti-competitive behaviour, such as price-fixing and misleading advertising and deceptive marketing practices |   |
| Educating Canadians on how to report suspected anti-competitive activity to the Competition Bureau  |   |
| Don't know  | 8 |
| Prefer not to answer  | 9 |

|   |    |
|---|----|
| 40. Before doing this survey, have you ever contacted the Competition Bureau?   |    |
| Yes, in the past 12 months  | 1  |
| Yes, but not in the past 12 months  | 2  |
| No  | 3  |
| Don't know  | 8  |
| Prefer not to answer  | 9  |
| 41. [IF CONTACTED] How did you contact the Competition Bureau? [ACCEPT ALL]   |    |
| I called their Information Centre.  | 1  |
| I sent them an online complaint.  | 2  |
| My lawyer contacted the Competition Bureau for me.  | 3  |
| I called the Federal Contracting Fraud Tip Line.  | 4  |
| Through social media (Facebook, X (formerly Twitter), Reddit or LinkedIn)   | 5  |
| Other [SPECIFY]   | 77 |
| Don't know  | 88 |
| Prefer not to answer  | 99 |
| 42. [IF CONTACTED] Why did you contact the Competition Bureau? [ACCEPT ALL]   |    |
| For information on their labelling laws   | 1  |
| For information on the <i>Competition Act</i>   | 2  |
| For information on CA Identification Numbers <sup>2</sup>   | 3  |
| To report a scam or other deceptive marketing practice  | 4  |
| To file a complaint   | 5  |
| For information on an investigation   | 6  |
| To request a community presentation   | 7  |
| To request a publication (e.g. <i>The Little Black Book of Scams</i> )  | 8  |
| Other [SPECIFY]   | 9  |
| Don't know  | 88 |
| Prefer not to answer  | 99 |
| 43. [IF CONTACTED] Overall, how satisfied have you been with the contact that you have had with the Competition Bureau? |    |
| Very dissatisfied   | 1  |
| Somewhat dissatisfied   | 2  |
| Neither satisfied nor dissatisfied  | 3  |
| Somewhat satisfied  | 4  |
| Very satisfied  | 5  |
| Don't know  | 8  |
| Prefer not to answer  | 9  |

---

<sup>2</sup> Roll Over: The CA Identification Number is an identification number registered for the exclusive use of a Canadian dealer on the label of a consumer textile article in place of a name and postal address.

|   |   |
|---|---|
| 44. Have you ever had any in-person contact with the Competition Bureau, such as at a tradeshow, conference, or outreach event? |   |
| Yes, recently (in the past 12 months)   | 1 |
| Yes, but not recently (in the past 12 months)   | 2 |
| No  | 3 |
| Don't know  | 8 |
| Prefer not to answer  | 9 |

To what extent do you agree or disagree with each of the following statements? [RANDOMIZE]

|  |    |
|--|----|
| 45. I have heard of activities the Competition Bureau does, but I was not aware they were involved   |    |
| 46. I am interested in hearing, reading or seeing more from the Competition Bureau   |    |
| 47. I have the information I need to make informed decisions when participating in the digital marketplace, such as purchasing products or comparing prices                          |    |
| 48. I believe the Competition Bureau's work is beneficial to the economy   |    |
| 49. [SPLIT SAMPLE I feel confident that I can identify and report online scams and fraudulent behaviour/ I feel confident that I can identify online scams and fraudulent behaviour] |    |
| 50. I would trust information provided by the Competition Bureau   |    |
| 51. I could recognize anti-competitive behaviours  |    |
| Strongly disagree  | 1  |
| Somewhat disagree  | 2  |
| Neither  | 3  |
| Somewhat agree   | 4  |
| Strongly agree   | 5  |
| Don't know   | 8  |
| Prefer not to answer   | 9  |
| 52. What method of communication would you prefer if you were to receive information about and from the Competition Bureau? Please select all that apply. [ACCEPT ALL.]              |    |
| Email  | 1  |
| Regular mail   | 2  |
| Telephone  | 3  |
| In-person  | 4  |
| Social media (Facebook, Twitter, Reddit or LinkedIn)   | 5  |
| News media   | 6  |
| Competition Bureau website   | 7  |
| Other [SPECIFY]  | 8  |
| I am not interested in receiving any information.  | 0  |
| Don't know   | 9  |
| Prefer not to answer   | 10 |

## Section 5: Sectors of the Canadians Economy that Matter to You

The Competition Bureau is an independent federal law enforcement agency that ensures Canadian businesses and consumers prosper in a competitive and innovative marketplace. It investigates anti-competitive activities, protects consumers, and promotes competitive markets.

53. Now that you know more about the Competition Bureau, in which sectors of the economy should the Bureau focus its work? Please select up to three that apply. [ACCEPT UP TO THREE.]

|  |    |
|--|----|
| Accommodation and Food Services (e.g. hotels and restaurants)                    | 1  |
| Waste Management Services (Waste collection and treatment)                       | 2  |
| Agriculture, Forestry, Fishing and Hunting                                       | 3  |
| Arts, Entertainment and Recreation   | 4  |
| Construction   | 5  |
| Educational Services   | 6  |
| Banking and Finance  | 7  |
| Health Care and Pharmaceuticals  | 8  |
| Telecommunications   | 9  |
| E-commerce Platforms (e.g. Amazon, Shopify, Facebook Marketplace and eBay)       | 10 |
| Social Media Platforms (e.g. Facebook, Twitter, and Instagram)                   | 11 |
| Manufacturing  | 12 |
| Retail Gas (e.g. gas stations)   | 13 |
| Real Estate and Rental and Leasing   | 14 |
| Retail Trade (e.g. grocery stores, department stores and automobile dealers)     | 15 |
| Transportation (e.g. air and rail transportation, and municipal transit systems) | 16 |
| Utilities (e.g. electric power generation and natural gas distribution)          | 17 |
| Other (please specify)   |    |
| Don't know   | 88 |
| Prefer not to answer   | 99 |

## Section 6: *Competition Act* Amendments

The next few questions are about recent changes to the *Competition Act*.

54. Prior to taking this survey, had you read, seen or heard anything about changes to the *Competition Act* introduced in Parliament in the fall of 2023?

|   |   |
|---|---|
| Clearly recall reading, seeing or hearing something | 3 |
| Vaguely recall reading, seeing or hearing something | 2 |
| Do not recall reading, seeing or hearing anything   | 1 |
| Don't know  | 8 |
| Prefer not to answer                                | 9 |

On December 15, 2023, important amendments to the *Competition Act* became law, strengthening the Competition Bureau's ability to promote competition and to prevent anti-competitive mergers and conduct.

Notably, these amendments:

- Create a framework for market studies that allows for collecting necessary information;
- Remove the efficiency defence in merger reviews and business collaborations;
- Simplify the legal test for abuse of dominance and increase the maximum penalties available; and,
- Expand the scope of the law to restrict more anti-competitive business collaborations.

What impact, if any, do you think these changes will have in each of the following areas?  
[RANDOMIZE]

55. The range of choices available to consumers  
56. The affordability of items such as groceries

|                          |   |
|--------------------------|---|
| Very positive impact     | 1 |
| Somewhat positive impact | 2 |
| No impact                | 3 |
| Somewhat negative impact | 4 |
| Very negative impact     | 5 |
| Don't know               | 8 |
| Prefer not to answer     | 9 |

### Section 7: Demographics

The last few questions are strictly for statistical purposes. All of your answers are completely anonymous.

57. Which of the following best describes your current employment status?

|  |   |
|--|---|
| Working full-time, that is, 30 or more hours per week                        | 1 |
| Working part-time, that is, less than 30 hours per week                      | 2 |
| Self-employed  | 3 |
| Unemployed, but looking for work   | 4 |
| A student attending school full-time   | 5 |
| A student attending school part-time   | 6 |
| Retired  | 7 |
| Not in the workforce (full-time homemaker, unemployed, not looking for work) | 8 |
| Prefer not to answer   | 9 |

58. [IF WORKING FULL-TIME OR SELF-EMPLOYED] Which of the following best describes the industry or sector you work in? If you are active in more than one sector, please identify the main sector.

|   |    |
|---|----|
| Construction                                    | 1  |
| Manufacturing                                   | 2  |
| Retail  | 3  |
| Agriculture, forestry or fisheries              | 4  |
| Mining, oil and gas extraction                  | 5  |
| Finance, insurance or real estate               | 6  |
| High tech                                       | 7  |
| Sales   | 8  |
| Telecommunications                              | 9  |
| Utilities                                       | 10 |
| Engineering                                     | 11 |
| Waste management                                | 12 |
| Healthcare and social assistance                | 13 |
| Transportation                                  | 14 |
| Wholesale trade                                 | 15 |
| Hospitality, accommodation and food services    | 16 |
| Non-profit/not-for-profit organizations         | 17 |
| Remediation/Other services                      | 18 |
| Arts, entertainment, and recreation             | 19 |
| Professional, scientific and technical services | 20 |
| Education                                       | 21 |
| Emergency services/public safety/security       | 22 |
| Legal/Law                                       | 23 |
| Other (please specify)                          | 88 |
| Prefer not to answer                            | 99 |

59. How would you describe the area in which you live?

|                      |   |
|----------------------|---|
| Urban                | 1 |
| Suburban             | 2 |
| Rural                | 3 |
| Prefer not to answer | 9 |

60. What is the language you speak most often at home?

|                      |   |
|----------------------|---|
| English              | 1 |
| French               | 2 |
| Other (SPECIFY)      | 3 |
| Prefer not to answer | 9 |

61. Were you born in Canada?

|                      |   |
|----------------------|---|
| Yes                  | 1 |
| No                   | 2 |
| Prefer not to answer | 9 |

62. [IF NOT BORN IN CANADA] Have you immigrated to Canada within the last 5 years?

|     |   |
|-----|---|
| Yes | 1 |
|-----|---|



|   |   |
|---|---|
| No  | 2 |
| Prefer not to answer  | 9 |
| 63. [IF BORN IN CANADA OR PREFER NOT TO ANSWER] Are you an Indigenous person, that is, First Nations, Métis or Inuk (Inuit)?  |   |
| Yes   | 1 |
| No  | 2 |
| Prefer not to answer  | 9 |
| 64. Do you identify as any of the following? Please select all that apply. [ACCEPT ALL THAT APPLY]  |   |
| A member of an ethno-cultural or a visible minority group   |   |
| A member of the 2SLGBTQ+ community  |   |
| A person with a physical, emotional or cognitive challenge  |   |
| None of the above   |   |
| Prefer not to answer  |   |
| 65. Which of the following categories best describes your total household income for 2019? That is, the total income of all persons in your household combined, before taxes? |   |
| Under \$20,000  | 1 |
| \$20,000 to \$39,999  | 2 |
| \$40,000 to \$59,999  | 3 |
| \$60,000 to \$79,999  | 4 |
| \$80,000 to \$99,999  | 5 |
| \$100,000 to \$149,999  | 6 |
| \$150,000 to \$199,999  | 7 |
| \$200,000 or more   | 8 |
| Prefer not to answer  | 9 |

[PRE-TEST ONLY ADD QUESTIONS A THRU J]

- a. Did you find any aspect of this survey difficult to understand? Y/N
- b. [IF A=YES] If so, please describe what you found difficult to understand.
- c. Did you find the way of the any of the questions in this survey were asked made it impossible for you to provide your answer? Y/N
- d. [IF C=YES] If so, please describe the problem with how the question was asked.
- e. Did you experience any difficulties with the language? Y/N
- f. [IF E=YES] If so, please describe what difficulties you had with the language.
- g. Did you find any terms confusing? Y/N
- h. [IF G=YES] If so, please describe what terms you found confusing.
- i. Did you encounter any other issues during the course of this survey that you would like us to be aware of? Y/N
- j. [IF I=YES] If so, what are they?

This concludes the survey. On behalf of the Competition Bureau, thank you for your valuable input.

In the coming months, the results of this survey will be available on the [Library and Archives Canada website](#).

## Questionnaire: Businesses

### Email invitation

LA VERSION FRANÇAISE SUIT.

Welcome and thank you for your participation in this study. Earnscliffe Strategy Group, in collaboration with Leger Marketing, has been hired to administer an online survey on behalf of the Government of Canada on marketplace issues that affect businesses. The results to surveys like this help the Government of Canada continue and improve its work.

This online survey will take about 11 minutes to complete. Your participation in the study is voluntary. All your answers will remain anonymous. They will be combined with responses from all other respondents to ensure no individual can be identified in any reporting for this research. As a token of our appreciation for your participation, you will receive [insert reward]. If you have any questions about this survey, please email [publicopinionresearch-recherchesurlopinionpublique@ised-isde.gc.ca](mailto:publicopinionresearch-recherchesurlopinionpublique@ised-isde.gc.ca) or if you encounter any difficulties, please email [research@earnsccliffe.ca](mailto:research@earnsccliffe.ca).

To begin, click on the link below.  
[URL]

Alternativement, pour continuer en français, veuillez cliquer sur [INSÉRER LE LIEN].

### Landing page

Welcome and thank you for your participation in this study. Earnscliffe Strategy Group, in collaboration with Leger, has been hired to administer an online survey on behalf of the Government of Canada on marketplace issues that affect businesses. The results to surveys like this help the Government of Canada continue and improve its work.

### How does the online survey work?

- You are being asked to offer your opinions and experiences through an online survey.
- We anticipate that the survey will take 11 minutes to complete.
- Your participation in the survey is completely voluntary.
- Your decision on whether or not to participate will not affect any dealings you may have with the Government of Canada.

### What about your personal information?

1. The personal information you provide is governed in accordance with the Privacy Act and is being collected in accordance with the Treasury Board Directive on Privacy Practices. We only collect the information we need to conduct the research project.
2. **Purpose of collection:** We require your personal information such as demographic information to better understand the topic of the research. However, your responses are always combined with the responses of others for analysis and reporting; you will never be identified.
3. **For more information:** This personal information collection is described in the standard personal information bank Public Communications – PSU 914, in Info Source, available online at [infosource.gc.ca](http://infosource.gc.ca).
4. **Your rights under the Privacy Act:** In addition to protecting your personal information, the Privacy Act gives you the right to request access to and correction of your personal

information. You also have the right to file a complaint with the Privacy Commissioner of Canada if you think your personal information has been handled improperly.

**What happens after the online survey?**

The final report written by Earncliffe Strategies will be available to the public from Library and Archives Canada six months after the end of fieldwork.

If you have any questions about the survey, you may contact Earncliffe Strategies at research@earncliffe.ca.

Your input is greatly appreciated, and we look forward to receiving your feedback.

Do you wish to continue?

Yes

No [TERMINATE]

**Section 1: Screening**

1. Please indicate whether you are involved in your company’s or organization’s decision making in any of the following areas? Please select all that apply. [ACCEPT ALL]

- Pricing 1
- Marketing 2
- Packaging 3
- Labelling 4
- Ensuring the company satisfies legal and regulatory requirements 5
- No, none of the above [THANK & TERMINATE] 6
- Prefer not to answer [THANK & TERMINATE] 9

2. Which of the following best describes the organization you work for?

- For-profit 1
- Not-for-profit/Non-profit 2
- Prefer not to answer [THANK & TERMINATE] 9

3. Approximately, how many full-time equivalent (FTE) staff does your company or organization currently employ in total? [RECORD ACTUAL NUMBER. ALSO, CODE INTO FOLLOWING CATEGORIES]

- 0-4 1
- 5-99 2
- 100-499 3
- 500+ 4
- Prefer not to answer [THANK & TERMINATE] 9

4. Do you work for a company or organization that operates in at least two countries other than Canada?
- |  |   |
|--|---|
| Yes                                      | 1 |
| No                                       | 2 |
| Prefer not to answer [THANK & TERMINATE] | 9 |

ALL BUSINESS RESPONDENTS MUST BE INVOLVED IN DECISION-MAKING  
 TO QUALIFY AS SMB: MUST BE <500 EMPLOYEES  
 TO QUALIFY AS MULTINATIONAL MUST OPERATE IN AT LEAST 2 OTHER COUNTRIES &  
 BE A DECISION-MAKER

5. Which of the following provinces or territories do you work in?
- |                                       |    |
|---------------------------------------|----|
| Newfoundland and Labrador             | 1  |
| Nova Scotia                           | 2  |
| Prince Edward Island                  | 3  |
| New Brunswick                         | 4  |
| Quebec                                | 5  |
| Ontario                               | 6  |
| Manitoba                              | 7  |
| Saskatchewan                          | 8  |
| Alberta                               | 9  |
| British Columbia                      | 10 |
| Yukon                                 | 11 |
| Nunavut                               | 12 |
| Northwest Territories                 | 13 |
| Prefer not to say [THANK & TERMINATE] | 99 |

## Section 2: Awareness & Perceptions

6. Can you name the organization responsible for enforcing federal competition laws and labelling laws (except as it relates to food products)?

[OPEN-END.]

Please indicate how aware you are, if at all, of the following activities. Please use a scale from 1 to 5 where 1 means “Not at all aware” and 5 means “Very aware.” [RANDOMIZE]

7. Price-fixing, bid-rigging, collusion
8. Misleading advertising and deceptive marketing practices
9. Mass-marketing fraud
10. Abuse of dominance (monopolization)
11. Consumer packaging and textile labelling, and marking of precious metals
12. Mergers and acquisitions
13. Wage-fixing and no-poaching agreements

|                      |   |
|----------------------|---|
| Not at all aware     | 1 |
| 2                    | 2 |
| 3                    | 3 |
| 4                    | 4 |
| Very aware           | 5 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

14. Canada has laws to protect consumers and businesses against activities that could significantly hinder innovation and competition, reduce choice of products or services, or raise prices.  
How important is it to your organization, if at all, that these laws are in place? Please use a scale from 1 to 5 where 1 means “Not at all important” and 5 means “Very important.”

|                      |   |
|----------------------|---|
| Not at all important | 1 |
| 2                    | 2 |
| 3                    | 3 |
| 4                    | 4 |
| Very important       | 5 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

Please indicate how familiar you are, if at all, with each of the following laws. Please use a scale from 1 to 5 where 1 means “Not at all familiar” and 5 means “Very familiar”. [RANDOMIZE]

15. A federal law called the *Competition Act* that governs most business conduct in Canada with the purpose of maintaining and encouraging competition and ensuring that businesses have a fair opportunity to participate in the Canadian economy
16. A federal law called the *Consumer Packaging and Labelling Act* that requires that prepackaged consumer products (excluding food) have accurate and meaningful labelling information
17. A federal law called the *Textile Labelling Act* that requires that textile articles, such as clothing, have accurate and meaningful labelling information
18. A federal law called the *Precious Metals Marking Act* that covers the requirements for the marking of precious metals such as gold and silver

|                      |   |
|----------------------|---|
| Not at all familiar  | 1 |
| 2                    | 2 |
| 3                    | 3 |
| 4                    | 4 |
| Very familiar        | 5 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

For the same list of laws, please indicate whether each is relevant or not to your company.  
[SAME ORDER AS ABOVE]

19. A federal law called the *Competition Act* that governs most business conduct in Canada with the purpose of maintaining and encouraging competition and ensuring that businesses have a fair opportunity to participate in the Canadian economy
20. A federal law called the *Consumer Packaging and Labelling Act* that requires that prepackaged consumer products have accurate and meaningful labelling information
21. A federal law called the *Textile Labelling Act* that requires that textile articles, such as clothing, have accurate and meaningful labelling information
22. A federal law called the *Precious Metals Marking Act* that covers the requirements for the marking of precious metals such as gold and silver

|                                   |   |
|-----------------------------------|---|
| Directly relevant                 | 1 |
| May be relevant, but not directly | 2 |
| Not relevant                      | 3 |
| Don't know                        | 8 |
| Prefer not to answer              | 9 |

23. If you need general information about competition law or compliance with any of these Acts, who or what would you consult? Please select all that apply. [RANDOMIZE. ACCEPT ALL THAT APPLY.]

|  |    |
|--|----|
| The Competition Bureau                               | 1  |
| A lawyer/Legal counsel                               | 2  |
| Innovation, Science, and Economic Development Canada | 3  |
| The Canadian Anti-Fraud Centre                       | 4  |
| A Government of Canada website                       | 5  |
| Chambers of Commerce/Trade associations              | 6  |
| Family/Friends                                       | 7  |
| Police (e.g., RCMP)                                  | 8  |
| Internet search                                      | 9  |
| Other (SPECIFY)                                      | 77 |
| Don't know   | 88 |
| Prefer not to answer                                 | 99 |

### Section 3: Basic Awareness & Impressions of the Competition Bureau

24. How familiar are you, if at all, with the Competition Bureau? Please use a scale from 1 to 5 where 1 means "Not at all familiar" and 5 means "Very familiar."

|                      |   |
|----------------------|---|
| Not at all familiar  | 1 |
| 2                    | 2 |
| 3                    | 3 |
| 4                    | 4 |
| Very familiar        | 5 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

The Competition Bureau is an independent federal law enforcement agency that investigates anti-competitive activities, protects consumers and promotes competitive markets. It is responsible for the administration and enforcement of the *Competition Act*, the *Textile and Labelling Act*, the *Consumer Packaging and Labelling Act* (except as it relates to food), and the *Precious Metals Marking Act*.

25. Which statement better reflects your knowledge of the Competition Bureau before completing this survey?

|  |   |
|--|---|
| This was already my understanding of the Competition Bureau          | 1 |
| This adds to what I already know about the Competition Bureau        | 2 |
| I did not know about the Competition Bureau before doing this survey | 3 |
| Don't know   | 8 |
| Prefer not to answer   | 9 |

26. Over the past year, do you recall seeing or hearing anything about the Competition Bureau?

|  |   |
|--|---|
| Clearly recall seeing or hearing something | 3 |
| Vaguely recall seeing or hearing something | 2 |
| Do not recall seeing or hearing anything   | 1 |
| Don't know                                 | 8 |
| Prefer not to answer                       | 9 |

#### Section 4: Awareness of Work of the Competition Bureau

27. Below is a list of cases pursued by the Competition Bureau. For each of the following, please indicate if you recall seeing or hearing about it. Please select all that apply. [RANDOMIZE. ACCEPT ALL.]

The bread price-fixing investigation, where there is an ongoing investigation into alleged price-fixing between producers to raise wholesale bread prices, as well as alleged price-fixing between grocery stores to raise retail prices. Canada Bread Company, Limited, a bread producer and distributor, was fined \$50 million after pleading guilty for its role in a criminal price-fixing arrangement

The Competition Bureau's attempt to seek a full-block of Rogers' proposed acquisition of Shaw

The Dufresne Group Inc. (TDG) and its affiliates agreed to pay \$3.25M to settle the Competition Bureau's concerns over marketing claims. The investigation found that TDG offered certain products at inflated regular prices and then advertised them at big discounts, suggesting significant savings. In addition, they made marketing claims to consumers using sale end dates or countdown timers that gave the false or misleading impression that deals on certain items would no longer be available after a certain time, when this was not the case

The Competition Bureau investigation that led to multiple criminal charges against Mr. Terry Croteau of Ontario alleging the use of deceptive telemarketing and false or misleading statements to get Canadian businesses to sign up for listings in online directories

The Competition Bureau's actions to stop unsubstantiated weight loss claims



The Competition Bureau's Gatineau bid-rigging case, where an engineering executive was accused in a bid-rigging scheme that bilked the City of Gatineau out of an estimated \$1.8 million

The Competition Bureau's challenge of Secure Energy Services' acquisition of Tervita Corporation

The Competition Bureau's review of the merger between admixture system firms Sika AG and MBCC Group

All of them

None of them

Don't know

88

Prefer not to answer

99

28. Below is a list of activities and publications by the Competition Bureau. For each of the following, please indicate if you recall seeing or hearing about it. Please select all that apply. [RANDOMIZE. ACCEPT ALL.]

The annual Fraud Prevention Month campaign

The Competition Bureau's submission to the Canadian Radio-Television and Telecommunications Commission (CRTC) on telecommunications services

The Competition Bureau's report on competitive intensity in Canada from 2000 – 2020

The Competition Bureau's summits, which they host, such as the Green Growth Summit and Canada's Competition Summit

The Competition Bureau's market studies, such as the retail grocery market study

The Competition Bureau's publication called the Deceptive Marketing Practices Digest

The Competition Bureau's publication called the Little Black Book of Scams

The Competition Bureau's efforts to communicate in plain language

The dedicated telephone tip line and online form to accept anonymous tips from Canadians who suspect fraud, collusion or corruption in federal government contracts and real estate property agreements

The Competition Bureau's Business alerts on how to protect your business from fraudsters, or how to ensure compliance with the law in the snow removal business

The Competition Bureau's guidance on compliance programs and/or compliance-related resources (e.g., compliance hub, Bootcamps (learning modules), podcasts and presentations)

The Competition Bureau's online complaint form where you can notify the Competition Bureau if you believe that a company or individuals have participated in anti-competitive activity

The Competition Bureau's enforcement guidance documents, such as the enforcement guidelines on illegal wage-fixing and no-poaching agreements, Intellectual Property Enforcement Guidelines, Abuse of Dominance Guidelines, Merger Enforcement Guidelines, Competitor Collaboration Guidelines, and guidelines on "Product of Canada" and "Made in Canada" Claims

The Competition Bureau's Immunity and Leniency Programs

All of them

None of them

Don't know

88

Prefer not to answer

99

29. Below is a list of Competition Bureau activities and publications. Please indicate all the ones, if any, that are of interest to you. [ACCEPT ALL. ADD “All of them” AND “None of them”.]

|   |    |
|---|----|
| Updates on the Bureau’s major enforcement cases   | 1  |
| The annual Fraud Prevention Month campaign  | 2  |
| The <i>Little Black Book of Scams</i> – a publication with tips to help consumers and businesses recognize and report scams in Canada   | 3  |
| The Competition Bureau’s competition promotion work with regulators and policymakers, including market studies, regulatory interventions and other related publications   | 4  |
| The Competition Bureau’s publication called the <i>Deceptive Marketing Practices Digest</i> – a publication that offers advice and presents the Bureau’s perspective on advertising and marketing practices   | 5  |
| The Competition Bureau’s Business alerts – alerts with information for businesses about deceptive marketing practices, misleading advertising and scams   | 6  |
| The Competition Bureau’s guidance on compliance programs and/or compliance-related resources (e.g., compliance hub, Bootcamps (learning modules), podcasts and presentations)   | 7  |
| The Competition Bureau’s enforcement guidance documents, such as the enforcement guidelines on illegal wage-fixing and no-poaching agreements, Intellectual Property Enforcement Guidelines, Abuse of Dominance Guidelines, Merger Enforcement Guidelines, Competitor Collaboration | 8  |
| The Competition Bureau’s Immunity and Leniency Programs   | 9  |
| All of them   | 10 |
| None of them  |    |
| Don’t know  | 77 |
| Prefer not to answer  | 88 |

30. Using the list below, please indicate the ones, if any, that have had an impact on your behaviour or work. Please select all that apply. [SAME ORDER AS ABOVE. ACCEPT ALL. ADD “All of them” AND “None of them”.]

|   |    |
|---|----|
| Updates on the Bureau’s major enforcement cases   | 1  |
| The annual Fraud Prevention Month campaign  | 2  |
| The <i>Little Black Book of Scams</i>   | 3  |
| The Competition Bureau’s competition promotion work with regulators and policymakers, such as market studies and regulatory interventions | 4  |
| The Competition Bureau’s publication called the <i>Deceptive Marketing Practices Digest</i>   | 5  |
| The Competition Bureau’s Business alerts  | 6  |
| The Competition Bureau Corporate guidance on compliance programs and/or compliance-related resources                                      | 7  |
| The Competition Bureau’s enforcement guidance documents   | 8  |
| The Competition Bureau’s Immunity and Leniency Programs   | 9  |
| All of them   | 10 |
| None of them  |    |
| Don’t know  | 77 |
| Prefer not to answer  | 88 |

[IF AT LEAST ONE ITEM SELECTED] You indicated that each of the following have had an impact on your behaviour or work. For each, please indicate what type of impact it had using the drop-down menu provided. [PIPE IN ONLY EACH ITEM SELECTED. USE DROP-DOWN MENU FOR RESPONSE.]

31. Updates on the Bureau’s major enforcement cases
32. The annual Fraud Prevention Month campaign
33. The *Little Black Book of Scams*
34. The Competition Bureau’s competition promotion work with regulators and policymakers, such as market studies and regulatory interventions
35. The Competition Bureau’s publication called the *Deceptive Marketing Practices Digest*
36. The Competition Bureau’s Business alerts
37. The Competition Bureau Corporate guidance on compliance programs and/or compliance-related resources
38. The Competition Bureau’s enforcement guidance documents
39. The Competition Bureau’s Immunity and Leniency Programs

|   |    |
|---|----|
| I implemented a Compliance Program or have enhanced my current program  | 1  |
| My company changed its business conduct to be compliant with Canada’s competition and labelling laws  | 2  |
| I didn’t do anything, but I have more knowledge on anti-competitive activity  | 3  |
| I contacted the Canadian Anti-Fraud Centre  | 4  |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP) | 5  |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity  | 6  |
| I filed a complaint with the RCMP or local police   | 7  |
| I filed a complaint with another agency   | 8  |
| I applied to the Immunity and Leniency Program  | 9  |
| Don’t know  | 88 |
| Prefer not to answer  | 99 |

40. Are there any other activities or publications by the Competition Bureau that have affected the way your company makes decisions?

|                      |   |
|----------------------|---|
| Yes [SPECIFY]        | 1 |
| No                   | 2 |
| Don’t know           | 8 |
| Prefer not to answer | 9 |

41. [IF YES] In that case, how did the Competition Bureau impact your behaviour?

|  |   |
|--|---|
| I implemented a Compliance Program or have enhanced my current program.  | 1 |
| My company changed its business conduct to be compliant with Canada’s competition and labelling laws.  | 2 |
| I didn’t do anything, but I have more knowledge on anti-competitive activity.  | 3 |
| I contacted the Canadian Anti-Fraud Centre.  | 4 |
| I called the Federal Contracting Fraud Tip Line (a joint initiative of the Competition Bureau, Public Services and Procurement Canada and the RCMP). | 5 |
| I filed a complaint with the Competition Bureau on suspected anti-competitive activity.  | 6 |

|  |    |
|--|----|
| I filed a complaint with the RCMP or local police. | 7  |
| I filed a complaint with another agency.           | 8  |
| I applied to the Immunity and Leniency Program.    | 9  |
| Don't know   | 88 |
| Prefer not to answer                               | 99 |

In your opinion, how is the Competition Bureau doing at each of the following? [RANDOMIZE]

42. Enforcing the laws against anti-competitive behaviour
43. Ensuring Canadian businesses can thrive and innovate in the digital marketplace
44. Addressing the competition issues associated with the digital transformations taking place in the marketplace
45. Providing Canadian businesses with Business alerts containing useful information on deceptive marketing practices, misleading advertising and scams
46. Helping Canadian businesses understand how to be compliant with Canada's competition and labelling laws
47. Educating Canadians on how to recognize anti-competitive behaviours, such as price-fixing and misleading advertising and deceptive marketing practices
48. Educating Canadians on how to report suspected anti-competitive activities to the Competition Bureau
49. Enabling businesses to develop their own compliance measures

|                         |   |
|-------------------------|---|
| Very poorly             | 1 |
| Poorly                  | 2 |
| Neither well nor poorly | 3 |
| Well                    | 4 |
| Very well               | 5 |
| Don't know              | 8 |
| Prefer not to answer    | 9 |

50. Have you ever contacted the Competition Bureau?

|                                    |   |
|------------------------------------|---|
| Yes, in the past 12 months         | 1 |
| Yes, but not in the past 12 months | 2 |
| No                                 | 3 |
| Don't know                         | 8 |
| Prefer not to answer               | 9 |

51. [IF CONTACTED] How did you contact the Competition Bureau? Please select all that apply. [ACCEPT ALL]

|   |   |
|---|---|
| I called their Information Centre.  | 1 |
| I sent them an online complaint.  | 2 |
| My lawyer contacted the Competition Bureau for me.                        | 3 |
| I called the Federal Contracting Fraud Tip Line.                          | 4 |
| Immunity and Leniency applicant   | 5 |
| Through social media (Facebook, X (formerly Twitter), Reddit or LinkedIn) | 6 |
| Other [SPECIFY]   | 7 |
| Don't know  | 8 |

|   |    |
|---|----|
| Prefer not to answer  | 9  |
| 52. [IF CONTACTED] Why did you contact the Competition Bureau? Please select all that apply. [ACCEPT ALL]                               |    |
| For information on merger guidelines  | 1  |
| For information on how to comply with labelling laws  | 2  |
| For information on how to comply with the <i>Competition Act</i>  | 3  |
| For information on CA Identification Numbers <sup>3</sup>   | 4  |
| For information on or to report a scam or other deceptive marketing practice  | 5  |
| To file a complaint   | 6  |
| To request a written opinion  | 7  |
| To submit a merger notification   | 8  |
| For information on their Immunity and Leniency Programs   | 9  |
| To request a compliance presentation  | 10 |
| For information on an investigation   | 11 |
| Other [SPECIFY]   | 77 |
| Don't know  | 88 |
| Prefer not to answer  | 99 |
| 53. [IF CONTACTED] Overall, how satisfied or dissatisfied have you been with the contact that you have had with the Competition Bureau? |    |
| Very dissatisfied   | 1  |
| Somewhat dissatisfied   | 2  |
| Neither satisfied nor dissatisfied  | 3  |
| Somewhat satisfied  | 4  |
| Very satisfied  | 5  |
| Don't know  | 8  |
| Prefer not to answer  | 9  |
| 54. [IF SOMEWHAT DISSATISFIED OR VERY DISSATISFIED] Why were you dissatisfied? [OPEN-END]   |    |
| Don't know  | 88 |
| Prefer not to answer  | 99 |
| 55. Have you ever had any in-person contact with the Competition Bureau, such as at a tradeshow, conference or outreach event?          |    |
| Yes, recently (in the past 12 months)   | 1  |
| Yes, but not recently (not in the past 12 months)   | 2  |
| No  | 3  |
| Don't know  | 8  |
| Prefer not to answer  | 9  |

---

<sup>3</sup>The CA Identification Number is an identification number that is registered for the exclusive use of a Canadian dealer on the label of a consumer textile article in place of a name and postal address.

To what extent do you agree or disagree with each of the following statements? [RANDOMIZE]

- 56. I had heard of activities the Competition Bureau does, but I was not aware they were involved
- 57. I am interested in hearing, reading or seeing more from the Competition Bureau
- 58. I believe the Competition Bureau’s enforcement and labelling law guidelines are clear
- 59. I believe the Competition Bureau’s work is beneficial to the economy
- 60. I would trust information provided by the Competition Bureau
- 61. I am confident the company I work for is compliant with competition and labelling laws
- 62. I know how to find out whether the company I work for is compliant with competition and labelling laws
- 63. I am aware of the requirements needed to submit a Merger Notification to the Competition Bureau
- 64. I could recognize anti-competitive behaviours

|                      |   |
|----------------------|---|
| Strongly disagree    | 1 |
| Somewhat disagree    | 2 |
| Neither              | 3 |
| Somewhat agree       | 4 |
| Strongly agree       | 5 |
| Don’t know           | 8 |
| Prefer not to answer | 9 |

- 65. What additional information, if any, would you like to receive from the Competition Bureau? Please be as specific as possible. [OPEN-END]

|  |    |
|--|----|
| Nothing/Want no additional information | 1  |
| Don’t know                             | 88 |
| Prefer not to answer                   | 99 |

- 66. What method of communication would you prefer if you were to receive information about and from the Competition Bureau? Please select all that apply. [ACCEPT ALL]

|  |    |
|--|----|
| Email  | 1  |
| Regular mail   | 2  |
| Telephone  | 3  |
| In-person  | 4  |
| Competition Bureau website                               | 5  |
| Social media (Facebook, X (Twitter), Reddit or LinkedIn) | 6  |
| News media   | 7  |
| Other [SPECIFY]  | 8  |
| I am not interested in receiving any information         | 0  |
| Don’t know   | 88 |
| Prefer not to answer                                     | 99 |

## Section 5: Sectors of the Canadian Economy that Matter to You

The Competition Bureau is an independent federal law enforcement agency that ensures Canadian businesses and consumers prosper in a competitive and innovative marketplace. It investigates anti-competitive activities, protects consumers and promotes competitive markets.

67. Now that you know more about the Competition Bureau, in which sectors of the economy should the Bureau focus its work? You may select up to three that apply. [ACCEPT UP TO THREE.]

|  |    |
|--|----|
| Accommodation and Food Services (e.g. hotels and restaurants)                    | 1  |
| Waste Management Services (Waste collection and treatment)                       | 2  |
| Agriculture, Forestry, Fishing and Hunting                                       | 3  |
| Arts, Entertainment and Recreation   | 4  |
| Construction   | 5  |
| Educational Services   | 6  |
| Banking and Finance  | 7  |
| Health Care and Pharmaceuticals  | 8  |
| Telecommunications   | 9  |
| E-commerce Platforms (e.g. Amazon, Shopify, Facebook Marketplace and eBay)       | 10 |
| Social Media Platforms (e.g. Facebook, Twitter, and Instagram)                   | 11 |
| Manufacturing  | 12 |
| Retail Gas (e.g. gas stations)   | 13 |
| Real Estate and Rental and Leasing   | 14 |
| Retail Trade (e.g. grocery stores, department stores and automobile dealers)     | 15 |
| Transportation (e.g. air and rail transportation, and municipal transit systems) | 16 |
| Utilities (e.g. electric power generation and natural gas distribution)          | 17 |
| Other (please specify)   |    |
| Don't know   | 88 |
| Prefer not to answer   | 99 |

## Section 6: *Competition Act* Amendments

The next few questions are about recent changes to the *Competition Act*.

68. Prior to taking this survey, had you read, seen or heard anything about changes to the *Competition Act* introduced in Parliament in the fall of 2023?

|   |   |
|---|---|
| Clearly recall reading, seeing or hearing something | 3 |
| Vaguely recall reading, seeing or hearing something | 2 |
| Do not recall reading, seeing or hearing anything   | 1 |
| Don't know  | 8 |
| Prefer not to answer                                | 9 |

On December 15, 2023, important amendments to the *Competition Act* became law, strengthening the Competition Bureau's ability to promote competition and to prevent anti-competitive mergers and conduct.

Notably, these amendments:

- Create a framework for market studies that allows for collecting necessary information;
- Remove the efficiency defence in merger reviews and business collaborations;
- Simplify the legal test for abuse of dominance and increase the maximum penalties available; and,
- Expand the scope of the law to restrict more anti-competitive business collaborations.

What impact, if any, do you think these changes will have in each of the following areas?  
[RANDOMIZE]

69. The range of choices available to consumers  
70. The affordability of items such as groceries

|                          |   |
|--------------------------|---|
| Very positive impact     | 1 |
| Somewhat positive impact | 2 |
| No impact                | 3 |
| Somewhat negative impact | 4 |
| Very negative impact     | 5 |
| Don't know               | 8 |
| Prefer not to answer     | 9 |

## Section 7: Demographics

The last few questions are strictly for statistical purposes. All of your answers are completely anonymous.

71. In which of the following provinces or territories does your organization have operations?  
Please select all that apply. [ACCEPT ALL]

|                           |    |
|---------------------------|----|
| Newfoundland and Labrador | 1  |
| Nova Scotia               | 2  |
| Prince Edward Island      | 3  |
| New Brunswick             | 4  |
| Quebec                    | 5  |
| Ontario                   | 6  |
| Manitoba                  | 7  |
| Saskatchewan              | 8  |
| Alberta                   | 9  |
| British Columbia          | 10 |
| Yukon                     | 11 |
| Nunavut                   | 12 |
| Northwest Territories     | 13 |



Prefer not to say 99

72. Which of the following best describes the industry or sector you work in? If you are active in more than one sector, please identify the main sector.

|   |    |
|---|----|
| Construction  | 1  |
| Manufacturing   | 2  |
| Agriculture, forestry or fisheries                                    | 4  |
| Mining, oil and gas extraction  | 5  |
| Finance and insurance   | 6  |
| Real Estate, Leasing, and Renting                                     | 8  |
| Telecommunications  | 9  |
| Other information and cultural industries                             | 10 |
| Utilities   | 11 |
| Engineering   | 12 |
| Legal/law   | 13 |
| High tech   | 14 |
| Other professional, scientific and technical services                 | 15 |
| Management of companies and enterprises                               | 16 |
| Waste management  | 17 |
| Pharmaceutical manufacturing and distribution                         | 18 |
| Healthcare and social assistance                                      | 19 |
| Transportation  | 20 |
| Wholesale trade   | 21 |
| Retail trade  | 22 |
| Hospitality, accommodation and food services                          | 23 |
| Non-profit/not-for-profit organizations                               | 24 |
| Administrative and support, waste management and remediation services | 25 |
| Arts, entertainment, and recreation                                   | 26 |
| Educational services  | 27 |
| Other services  | 29 |
| Public Administration   | 30 |
| Other (please specify)  | 88 |
| Prefer not to answer  | 99 |

73. From the list of descriptors below, please indicate the ones that apply to your company. Please select all that apply. [ACCEPT ALL. ADD “All of them” AND “None of them”.]

|   |    |
|---|----|
| An established business looking to enter new markets      | 1  |
| An established business looking to innovate               | 2  |
| A woman-led business                                      | 3  |
| A business led by a newcomer/ immigrant                   | 4  |
| A start up  | 5  |
| A STEM (science, technology, engineering or math) company | 6  |
| An aspiring scale-up                                      | 7  |
| An Indigenous led business                                | 8  |
| All of them   | 77 |
| None of them  | 88 |
| Don't know  | 98 |

Prefer not to answer 99

74. Please indicate your gender.

|                      |   |
|----------------------|---|
| Male gender          | 1 |
| Female gender        | 2 |
| Gender diverse       | 3 |
| Prefer not to answer | 9 |

This concludes the survey. On behalf of the Competition Bureau, thank you for your valuable input.

In the coming months, the results of this survey will be available on the [Library and Archives Canada website](#).

## Questionnaire: Regulators and policymakers

### Email invitation

LA VERSION FRANÇAISE SUIT

Welcome and thank you for your participation in this study. Earnscliffe Strategy Group, in collaboration with Leger Marketing, has been hired to administer an online survey on behalf of the Government of Canada on issues that affect consumers and businesses. The results to surveys like this help the Government of Canada continue and improve its work.

This online survey will take about 11 minutes to complete. Your participation in the study is voluntary. All your answers will remain anonymous. They will be combined with responses from all other respondents to ensure no particular individual can be identified in any reporting for this research.

If you have any questions about the survey, please email [publicopinionresearch-recherchesurlopionpublique@ised-isde.gc.ca](mailto:publicopinionresearch-recherchesurlopionpublique@ised-isde.gc.ca) or if you encounter any difficulties, please email [research@earnsccliffe.ca](mailto:research@earnsccliffe.ca).

To begin, click on the link below.

[URL]

Alternativement, pour continuer en français, veuillez cliquer sur [INSÉRER LE LIEN].

### Landing page

Welcome and thank you for your participation in this study. Earnscliffe Strategy Group, in collaboration with Leger, has been hired to administer an online survey on behalf of the Government of Canada on marketplace issues that affect consumers. The results to surveys like this help the Government of Canada continue and improve its work.

### How does the online survey work?

- You are being asked to offer your opinions and experiences through an online survey.
- We anticipate that the survey will take 11 minutes to complete.
- Your participation in the survey is completely voluntary.
- Your decision on whether or not to participate will not affect any dealings you may have with the Government of Canada.

### What about your personal information?

1. The personal information you provide is governed in accordance with the [Privacy Act](#) and is being collected in accordance with the [Treasury Board Directive on Privacy Practices](#). We only collect the information we need to conduct the research project.
2. **Purpose of collection:** We require your personal information such as demographic information to better understand the topic of the research. However, your responses are always combined with the responses of others for analysis and reporting; you will never be identified.
3. **For more information:** This personal information collection is described in the standard personal information bank [Public Communications – PSU 914](#), in Info Source, available online at [infosource.gc.ca](http://infosource.gc.ca).
4. **Your rights under the Privacy Act:** In addition to protecting your personal information, the [Privacy Act](#) gives you the right to request access to and correction of your personal

information. You also have the right to file a complaint with the Privacy Commissioner of Canada if you think your personal information has been handled improperly.

**What happens after the online survey?**

The final report written by Earncliffe Strategies will be available to the public from Library and Archives Canada six months after the end of fieldwork.

If you have any questions about the survey, you may contact Earncliffe Strategies at research@earncliffe.ca.

Your input is greatly appreciated, and we look forward to receiving your feedback.

Do you wish to continue?

Yes

No [TERMINATE]

**Section 1: Screening**

1. Which of the following provinces or territories do you work in?

|                                       |    |
|---------------------------------------|----|
| Newfoundland and Labrador             | 1  |
| Nova Scotia                           | 2  |
| Prince Edward Island                  | 3  |
| New Brunswick                         | 4  |
| Quebec                                | 5  |
| Ontario                               | 6  |
| Manitoba                              | 7  |
| Saskatchewan                          | 8  |
| Alberta                               | 9  |
| British Columbia                      | 10 |
| Yukon                                 | 11 |
| Nunavut                               | 12 |
| Northwest Territories                 | 13 |
| Prefer not to say [THANK & TERMINATE] | 99 |

2. Which of the following best describes the level of government you work in?

|  |   |
|--|---|
| Federal                                  | 1 |
| Provincial or Territorial                | 2 |
| Municipal                                | 3 |
| Prefer not to answer [THANK & TERMINATE] | 9 |

3. For this question, “policy” in this case refers to a set of principles or guidelines designed to guide the actions and decisions of an institution or organization. Also, for this question, “regulation” refers to rules and procedures used to enforce laws or mandate particular behaviours. Do you work in policy (e.g. policy development/implementation) or regulation (e.g. regulation development/implementation and enforcement)?

|                                |   |
|--------------------------------|---|
| Policy                         | 1 |
| Regulation                     | 2 |
| Both policy and regulation     | 3 |
| Don’t Know [THANK & TERMINATE] | 9 |

4. What area of policy or regulation do you work in? Please select all options that apply.

|                                       |    |
|---------------------------------------|----|
| Health and Public Safety              | 1  |
| Education and Community Development   | 2  |
| Food and Agriculture                  | 3  |
| Global/International Affairs          | 4  |
| Infrastructure & Urban Development    | 5  |
| Transportation                        | 6  |
| Oil, Gas, and Natural Resources       | 7  |
| Telecommunications                    | 8  |
| Finance and Banking                   | 9  |
| Environment and Climate Change        | 10 |
| Cabinet Affairs/Parliamentary Affairs | 11 |
| Procurement and Government Services   | 12 |
| Military/National Defence             | 13 |
| Employment and Social Development     | 14 |
| Law Enforcement                       | 15 |
| Law and Legislative Affairs           | 16 |
| Science and Innovation                | 17 |
| Travel and Tourism                    | 18 |
| Economics                             | 19 |
| Other (SPECIFY)                       | 20 |

## Section 2: Awareness & Perceptions of Laws

5. Can you name the organization responsible for enforcing federal competition and labelling laws (except as it relates to food or health-related products)?

[OPEN-END.]

Below is a list of activities that are subject to Canadian laws. Please indicate how aware you are of each activity. Please use a scale from 1 to 5 where 1 means “Not at all aware” and 5 means “Very aware.” [RANDOMIZE]

6. Consumer packaging and textile labelling, and marking of precious metals

7. Price-fixing, bid-rigging, collusion
8. Misleading advertising and deceptive marketing practices
9. Abuse of dominance (monopolization)
10. Mergers and acquisitions
11. Wage-fixing and no-poaching agreements

|                      |   |
|----------------------|---|
| Not at all aware     | 1 |
| 2                    | 2 |
| 3                    | 3 |
| 4                    | 4 |
| Very aware           | 5 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

12. How important is it 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? Please use a scale from 1 to 5 where 1 means “Not at all important” and 5 means “Very important.”

|                      |   |
|----------------------|---|
| Not at all important | 1 |
| 2                    | 2 |
| 3                    | 3 |
| 4                    | 4 |
| Very important       | 5 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

Please indicate how familiar you are with each of the following laws. [RANDOMIZE] Please use a scale from 1 to 5 where 1 means “Not at all familiar” and 5 means “Very familiar.”

13. A federal law called the **Competition Act** that governs most business conduct with the purpose of maintaining and encouraging competition in Canada; promoting the efficiency and adaptability of the Canadian economy; and ensuring utilities that businesses have a fair opportunity to participate in the Canadian economy
14. A federal law called the **Consumer Packaging and Labelling Act** that requires that prepackaged consumer products (excluding food) have accurate and meaningful labelling information
15. A federal law called the **Textile Labelling Act** that requires that textile articles, such as clothing, have accurate and meaningful labelling information
16. A federal law called the **Precious Metals Marking Act** that covers the requirements for the marking of precious metals such as gold and silver

|                      |   |
|----------------------|---|
| Not at all familiar  | 1 |
| 2                    | 2 |
| 3                    | 3 |
| 4                    | 4 |
| Very familiar        | 5 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

17. Do you consider competition issues and principles when developing policy or regulation?

|                      |   |
|----------------------|---|
| Yes, often           | 1 |
| Yes, but not often   | 2 |
| No                   | 3 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

Do you refer to any of the following laws to inform policy development or regulation development and enforcement within your organization?

18. A federal law called the **Competition Act** that governs most business conduct with the purpose of maintaining and encouraging competition in Canada; promoting the efficacy and adaptability of the Canadian economy; and ensuring that businesses have a fair opportunity to participate in the Canadian economy

19. A federal law called the **Consumer Packaging and Labelling Act** that requires that prepackaged consumer products (excluding food) have accurate and meaningful labelling information

20. A federal law called the **Textile Labelling Act** that requires that textile articles, such as clothing, have accurate and meaningful labelling information

21. A federal law called the **Precious Metals Marking Act** that covers the requirements for the marking of precious metals such as gold and silver

|                      |   |
|----------------------|---|
| Yes, often           | 1 |
| Yes, but not often   | 2 |
| No                   | 3 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

22. If you need general information about competition laws or labelling laws, who or what do you consult? Please select all that apply. [RANDOMIZE. ACCEPT ALL.]

|   |    |
|---|----|
| The Competition Bureau  | 1  |
| The Department of Justice Canada or the justice department within my province | 2  |
| Innovation, Science, and Economic Development Canada (Government of Canada)   | 3  |
| A Government of Canada website  | 4  |
| Chambers of Commerce/Trade associations                                       | 5  |
| The Internet  | 6  |
| Other (SPECIFY)   | 77 |
| Don't know  | 88 |
| Prefer not to answer  | 99 |

### Section 3: Basic Awareness & Impressions of the Competition Bureau

23. How familiar are you with the Competition Bureau? Please use a scale from 1 to 5 where 1 means “Not at all familiar” and 5 means “Very familiar.”

|                      |   |
|----------------------|---|
| Not at all familiar  | 1 |
| 2                    | 2 |
| 3                    | 3 |
| 4                    | 4 |
| Very familiar        | 5 |
| Don’t know           | 8 |
| Prefer not to answer | 9 |

The Competition Bureau is an independent federal law enforcement agency that investigates anti-competitive activities, protects consumers and promotes competitive markets. It is responsible for the administration and enforcement of the *Competition Act*, the *Consumer Packaging and Labelling Act* (except as it relates to food), the *Textile Labelling Act* and the *Precious Metals Marking Act*.

24. Which statement best reflects your knowledge of the Competition Bureau before completing this survey?

|  |   |
|--|---|
| This was already my understanding of the Competition Bureau          | 1 |
| This adds to what I already know about the Competition Bureau        | 2 |
| I did not know about the Competition Bureau before doing this survey | 3 |
| Don’t know   | 8 |
| Prefer not to answer   | 9 |

25. Over the past year, how clearly do you recall seeing or hearing anything about the Competition Bureau?

|  |   |
|--|---|
| Clearly recall seeing or hearing something | 3 |
| Vaguely recall seeing or hearing something | 2 |
| Do not recall seeing or hearing anything   | 1 |
| Don’t know                                 | 8 |
| Prefer not to answer                       | 9 |

### Section 4: Awareness of Work of the Competition Bureau

26. Below is a list of cases pursued by the Competition Bureau. For each of the following, please indicate if you recall seeing or hearing about it. Please select all that apply. [RANDOMIZE. ACCEPT ALL.]

The bread price-fixing investigation, where there is an ongoing investigation into alleged price-fixing between producers to raise wholesale bread prices, as well as alleged price-fixing between grocery stores to raise retail prices. Canada Bread Company, Limited, a



bread producer and distributor, was fined \$50 million after pleading guilty for its role in a criminal price-fixing arrangement.

The Competition Bureau’s attempt to seek a full-block of Rogers’ proposed acquisition of Shaw

The Dufresne Group Inc. (TDG) and its affiliates agreed to pay \$3.25M to settle the Competition Bureau’s concerns over marketing claims. The investigation found that TDG offered certain products at inflated regular prices and then advertised them at big discounts, suggesting significant savings. In addition, they made marketing claims to consumers using sale end dates or countdown timers that gave the false or misleading impression that deals on certain items would no longer be available after a certain time, when this was not the case

The Competition Bureau investigation that led to multiple criminal charges against Mr. Terry Croteau of Ontario alleging the use of deceptive telemarketing and false or misleading statements to get Canadian businesses to sign up for listings in online directories.

The Competition Bureau’s actions to stop unsubstantiated weight loss claims

The Competition Bureau’s Gatineau bid-rigging case, where an engineering executive was accused in a bid-rigging scheme that bilked the City of Gatineau out of an estimated \$1.8 million. The Competition Bureau’s challenge of Secure Energy Services’ acquisition of Tervita Corporation

The Competition Bureau’s review of the merger between admixture system firms Sika AG and MBCC Group

All of them

None of them

Don’t know

Prefer not to answer

88

99

27. Below is a list of activities and publications by the Competition Bureau. For each of the following, please indicate if you recall seeing or hearing about it. Please select all that apply. [RANDOMIZE. ACCEPT ALL.]

The annual Fraud Prevention Month campaign, including the Little Black Book of Scams

The Competition Bureau’s report on competitive intensity in Canada from 2000 – 2020

The Competition Bureau’s summits, which they host, such as the Green Growth Summit and Canada’s Competition Summit

The Competition Bureau’s market studies, such as the retail grocery market study

The Competition Bureau’s submissions and regulatory interventions, such as the submission to the Government of Canada’s consultation on competition policy

The Competition Assessment Toolkit for regulators and policymakers, a step-by-step guide on how to assess the competitive impact of regulations and identify pro-competitive alternatives

The Competition Bureau’s guidance on compliance programs and/or compliance-related resources (e.g., compliance hub, Bootcamps (learning modules), podcasts and presentations)

The Competition Bureau’s online complaint form where you can notify the Competition Bureau if you believe that a company or individuals have participated in anti-competitive activity

The Competition Bureau’s enforcement guidance documents, such as the enforcement guidelines on illegal wage-fixing and no-poaching agreements, Intellectual Property

Enforcement Guidelines, Abuse of Dominance Guidelines, Merger Enforcement Guidelines, Competitor Collaboration Guidelines, and guidelines on "Product of Canada" and "Made in Canada" Claims

The Competition Bureau's Immunity and Leniency Programs

All of them

None of them

Don't know

88

Prefer not to answer

99

28. Below is a list of Competition Bureau activities and publications. Please indicate all of the ones, if any, that are of interest to you. [ACCEPT ALL.]

Updates on the Competition Bureau's major enforcement cases

The annual Fraud Prevention Month campaign

*The Little Black Book of Scams* – a publication with tips to help consumers and businesses recognize and report scams in Canada

The Competition Bureau's *Deceptive Marketing Practices Digest* publication – a publication that offers advice and presents the Bureau's perspective on advertising and marketing practices

The Competition Bureau's market studies (studies that assess a sector from a competition perspective)

The Competition Bureau's report on competitive intensity in Canada from 2000 – 2020

Advice on competition-related issues from the Competition Bureau

The Competition Bureau's competition promotion work with regulators and policymakers, including submissions and regulatory interventions, such as the submission to the Government of Canada's consultation on competition policy

The Competition Bureau's guidance on compliance programs and/or compliance-related resources (e.g., compliance hub, Bootcamps (learning modules), podcasts and presentations)

The Competition Assessment Toolkit for regulators and policymakers, a step-by-step guide on how to assess the competitive impact of regulations and identify pro-competitive alternatives

The Competition Bureau's enforcement guidance documents, such as the enforcement guidelines on illegal wage-fixing and no-poaching agreements, Intellectual Property Enforcement Guidelines, Abuse of Dominance Guidelines, Merger Enforcement Guidelines, Competitor Collaboration

77

All of them

88

None of them

Don't know

Prefer not to answer

29. Please indicate the activities and publications, if any, that have influenced your work, creating a change in your decision-making, policy development or regulation implementation or enforcement. Please select all that apply. [ACCEPT ALL.]

None of them

Updates on the Competition Bureau's major enforcement cases

1

The annual Fraud Prevention Month campaign

2

*The Little Black Book of Scams*

3

|   |    |
|---|----|
| The Competition Bureau's <i>Deceptive Marketing Practices Digest</i> publication  | 4  |
| Competition Bureau market studies (studies that assess a sector from a competition perspective)   | 6  |
| Advice on competition-related issues from the Competition Bureau  | 7  |
| The Competition Bureau's submissions and regulatory interventions, such as the submission to the Government of Canada's consultation on competition policy  | 8  |
| The Competition Bureau's guidance on compliance programs and/or compliance-related resources (e.g., compliance hub, Bootcamps (learning modules), podcasts and presentations)   | 9  |
| The Competition Assessment Toolkit for regulators and policymakers, a step-by-step guide on how to assess the competitive impact of regulations and identify pro-competitive alternatives   | 10 |
| The Competition Bureau's enforcement guidance documents, such as the enforcement guidelines on illegal wage-fixing and no-poaching agreements, Intellectual Property Enforcement Guidelines, Abuse of Dominance Guidelines, Merger Enforcement Guidelines, Competitor Collaboration | 11 |
| All of them   | 66 |
| None of them  | 77 |
| Don't know  | 88 |
| Prefer not to answer  | 99 |

30. Please specify how an activity, publication, or outcome from the Competition Bureau has affected your decision-making or work. Please select all that apply. [ACCEPT ALL.]

|   |    |
|---|----|
| I requested a compliance presentation from the Competition Bureau   | 1  |
| I notified the Competition Bureau of suspected anti-competitive activity in a sector/industry                 | 2  |
| I reported a scam or fraudulent activity to the Competition Bureau  | 3  |
| I requested advice or information from the Competition Bureau on competition and/or labelling laws and issues | 4  |
| I considered the Bureau's work when making decisions regarding a policy or regulation                         | 5  |
| Other [SPECIFY]   | 6  |
| No activity, publication or outcome from the Competition Bureau has affected my decision-making or work       |    |
| Don't Know  | 88 |
| Prefer not to answer  | 99 |

31. Have you ever contacted the Competition Bureau?

|                                    |   |
|------------------------------------|---|
| Yes, in the past 12 months         | 1 |
| Yes, but not in the past 12 months | 2 |
| No                                 | 3 |
| Don't know                         | 8 |
| Prefer not to answer               | 9 |

|  |    |
|--|----|
| 32. [IF CONTACTED] How did you contact the Competition Bureau? Please select all that apply. [ACCEPT ALL]                  |    |
| I contacted their Information Centre   | 1  |
| I sent an email to a Competition Bureau employee/ representative   | 2  |
| I contacted the Merger Intelligence and Notification Unit  | 3  |
| Through the Department of Justice Canada or the justice/legislative department in my province                              | 4  |
| I contacted Innovation, Science and Economic Development Canada (Government of Canada)                                     | 5  |
| I called the Federal Contracting Fraud Tip Line  | 6  |
| Through social media   | 7  |
| Other [SPECIFY]  | 77 |
| Don't know   | 88 |
| Prefer not to answer   | 99 |
| 33. [IF CONTACTED] Why did you contact the Competition Bureau? Please select all that apply. [ACCEPT ALL]                  |    |
| For information on their enforcement guidelines  | 1  |
| For information on competition and/or labelling laws   | 2  |
| For information on or to report a scam or other deceptive marketing practice   | 3  |
| For advice on regulations or policies  | 4  |
| To file a complaint  | 5  |
| Merger notification  | 6  |
| To request a compliance presentation   | 7  |
| For information on an investigation  | 8  |
| Other [SPECIFY]  | 77 |
| Don't know   | 88 |
| Prefer not to answer   | 99 |
| 34. [IF HAVE CONTACTED] Did you find the information or service provided by the Competition Bureau useful or effective?    |    |
| Yes  | 1  |
| No   | 2  |
| Don't know   | 8  |
| Prefer not to answer   | 9  |
| 35. [IF NO] Why was your interaction not useful or effective? [OPEN-END]   |    |
| Don't know   | 88 |
| Prefer not to answer   | 99 |
| 36. Have you ever had in-person contact with the Competition Bureau, such as at a tradeshow, conference or outreach event? |    |
| Yes, recently in the past 12 months  | 1  |
| Yes, but not recently (not in the past 12 months)  | 2  |

|                      |   |
|----------------------|---|
| No                   | 3 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

To what extent do you agree or disagree with each of the following statements? [RANDOMIZE]

37. I believe competition should be considered when developing policies and regulations.
38. I believe competition is important to the Canadian economy.
39. I believe competition drives businesses to innovate.
40. I believe the Competition Bureau's work is beneficial to the economy.
41. I would trust information provided by the Competition Bureau.
42. I believe the Competition Bureau has sufficient expertise in my policy or regulatory area.
43. I believe the Competition Bureau provides adequate advice to governmental decision-makers on issues related to competition.
44. I believe competition plays an important role in strengthening the digital economy.
45. My organization conducts work that relates to the digital economy.

|                      |   |
|----------------------|---|
| Strongly disagree    | 1 |
| Somewhat disagree    | 2 |
| Neither              | 3 |
| Somewhat agree       | 4 |
| Strongly agree       | 5 |
| Don't know           | 8 |
| Prefer not to answer | 9 |

46. What additional information, if any, would you like to receive from the Competition Bureau?  
Please be as specific as possible. [OPEN-END]

|   |    |
|---|----|
| Nothing/ I do not want additional information | 1  |
| Don't know                                    | 88 |
| Prefer not to answer                          | 99 |

47. What is your preferred method of receiving information about and from the Competition Bureau?

|   |    |
|---|----|
| Email   | 1  |
| Telephone   | 2  |
| In-person   | 3  |
| Website   | 4  |
| Social media (e.g., Facebook, X (formerly Twitter)) | 5  |
| Other [SPECIFY]                                     | 77 |
| Don't know  | 88 |
| Prefer not to answer                                | 99 |

## Section 5: *Competition Act* Amendments

The next few questions are about recent changes to the *Competition Act*.

48. Prior to taking this survey, had you read, seen or heard anything about changes to the *Competition Act* introduced in Parliament in the fall of 2023?

|   |   |
|---|---|
| Clearly recall reading, seeing or hearing something | 3 |
| Vaguely recall reading, seeing or hearing something | 2 |
| Do not recall reading, seeing or hearing anything   | 1 |
| Don't know  | 8 |
| Prefer not to answer                                | 9 |

On December 15, 2023, important amendments to the *Competition Act* became law, strengthening the Competition Bureau's ability to promote competition and to prevent anti-competitive mergers and conduct.

Notably, these amendments:

- Create a framework for market studies that allows for collecting necessary information;
- Remove the efficiency defence in merger reviews and business collaborations;
- Simplify the legal test for abuse of dominance and increase the maximum penalties available; and,
- Expand the scope of the law to restrict more anti-competitive business collaborations.

What impact, if any, do you think these changes will have in each of the following areas?  
[RANDOMIZE]

49. The range of choices available to consumers  
50. The affordability of items such as groceries

|                          |   |
|--------------------------|---|
| Very positive impact     | 1 |
| Somewhat positive impact | 2 |
| No impact                | 3 |
| Somewhat negative impact | 4 |
| Very negative impact     | 5 |
| Don't know               | 8 |
| Prefer not to answer     | 9 |

Section 6: Demographics

The last question is for statistical purposes. Your answer is completely anonymous.

51. Please indicate your gender.

|                      |   |
|----------------------|---|
| Male gender          | 1 |
| Female gender        | 2 |
| Gender diverse       | 3 |
| Prefer not to answer | 9 |

This concludes the survey. On behalf of the Competition Bureau, thank you for your valuable input.

In the coming months, the results of this survey will be available on the [Library and Archives Canada website](#).