



**Innovation, Science and
Economic Development Canada**

Business Supports Campaign Evaluation Research

Final Report

April 2024

Prepared for Innovation, Science and Economic Development Canada

Supplier name: Qorus Consulting Group Inc.

Contract award date: September 15, 2023

Contract number: CW2330641

Contract value: \$217,609.75

Delivery date: April 2024

POR Number: 050-23

For more information, please contact Innovation, Science and Economic Development Canada at:

IC.PublicOpinionResearch-Recherchesurlopinionpublique.IC@canada.ca

Ce rapport est aussi disponible en français

This publication is available online at <https://www.ic.gc.ca/eic/site/112.nsf/eng/home>.

To obtain a copy of this publication, or to receive it in an alternate format (Braille, large print, etc.), please fill out the Publication Request Form at www.ic.gc.ca/Publication-Request or contact:

Web Services Centre
Innovation, Science and Economic Development Canada
C.D. Howe Building
235 Queen Street
Ottawa, ON K1A 0H5
Canada

Telephone (toll-free in Canada): 1-800-328-6189
Telephone (international): 613-954-5031
TTY (for hearing impaired): 1-866-694-8389
Business hours: 8:30 a.m. to 5:00 p.m. (Eastern Time)
Email: ISED@canada.ca

Permission to Reproduce

Except as otherwise specifically noted, the information in this publication may be reproduced, in part or in whole and by any means, without charge or further permission from the Department of Industry, provided that due diligence is exercised in ensuring the accuracy of the information reproduced; that the Department of Industry is identified as the source institution; and that the reproduction is not represented as an official version of the information reproduced or as having been made in affiliation with, or with the endorsement of, the Department of Industry.

For permission to reproduce the information in this publication for commercial purposes, please fill out the Application for Crown Copyright Clearance at www.ic.gc.ca/copyright-request or contact the Web Services Centre mentioned above.

© His Majesty the King in Right of Canada, as represented by the Minister of Industry, (2023).

Cat. No. Iu4-440/2024E-PDF

978-0-660-72941-1

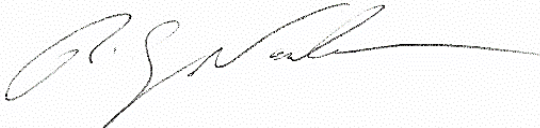
Aussi offert en français sous le titre : Recherche d'évaluation de la campagnes de soutien aux entreprises

Political neutrality statement

I hereby certify as Senior Officer of Quorus Consulting Group Inc. that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the [Policy on Communications and Federal Identity](#) and the [Directive on the Management of Communications - Appendix C](#).

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:



A handwritten signature in black ink, appearing to read "Rick Nadeau", is written over a light gray, textured rectangular background. The signature is fluid and cursive, with a long horizontal stroke extending to the right.

April 2024
Rick Nadeau, President
Quorus Consulting Group Inc.

Table of contents

Executive summary	6
Background and objectives	6
Methodology.....	6
Research findings – qualitative phase	7
Research findings – quantitative phase.....	12
Background and research objectives	20
Research findings - focus groups and depth interviews	22
Current challenges and priorities	22
Awareness of federal supports	23
Reactions to proposed advertising concepts.....	24
Concept 1A - Uncomplicated – magic ball.....	26
Concept 1B - Uncomplicated – Business Benefits Finder	28
Concept 2 – Don’t problem solve alone	31
Concept 3 – At your fingertips.....	33
Summary reactions to the campaign.....	35
Summary reactions to a mock-up of the Business Supports landing page	36
Research findings – pre-campaign ACET survey	42
Unaided ad recall	42
Campaign recall.....	44
Business Outlook.....	48
Research findings – post-campaign ACET survey	65
Unaided ad recall	65
Campaign recall.....	67
Business Outlook.....	73
Awareness and understanding of campaign	97
Detailed methodology	109
Qualitative research	109

Target audience and sample frame	109
Description of data collection procedures	110
Quantitative research	114
Overview	114
Questionnaire Design.....	114
Sampling.....	114
Administration	116
Non-Response Bias Analysis	121
Appendices.....	123
Appendix A: Recruitment screener – focus groups	124
Appendix B: Moderation guide – focus groups	137
Appendix C: Questionnaire – Pre-ACET	148
Appendix D: Questionnaire – Post-ACET	159

Executive summary

Background and objectives

To bring awareness to Canadian small and medium-sized enterprises (SMEs) of the easy access to hundreds of programs and services provided by the Government of Canada to help them address their business needs. In order to raise awareness, promote the program and engage SME's, ISED developed an advertisement campaign. This research was used to help select and develop creative concepts (both organic and paid messaging) for this campaign by seeking feedback from the campaign's intended audience.

Additionally, the research sought to establish a baseline of awareness against which to measure the success of the campaign.

Methodology

Qualitative phase

The qualitative research methodology consisted of nine online focus groups and four one-on-one interviews which were completed between September 25 and September 28, 2023. Participants were owners, partners or senior managers of small and medium-sized businesses from across Canada, with six focus groups and three interviews with businesses 1 to 40 employees and three focus groups and one interview dedicated to businesses with 41 to 500 employees. A total of 55 individuals participated in the research.

Quantitative phases

The quantitative research methodology consisted of two waves of online surveys with small and medium-sized businesses: a baseline survey and a post-campaign survey. The baseline wave consisted of 706 surveys with SMEs conducted between October 13 and November 9, 2023. The post-ACET wave consisted of 705 surveys with SMEs conducted between March 18 and April 12, 2024.

A non-probability sample approach was used – more specifically, the data were collected among respondents drawn from an online Canadian business panel. Results were weighted by region and business size to reflect the distribution of Canadian SMEs, as catalogued in Statistics Canada’s Business Register, as of June 2023.

Research findings – qualitative phase

Current challenges, priorities and awareness of federal supports

When asked to describe the main challenge their business is facing these days, most businesses focused on either access to funds or to labour. Challenges related to funds pertained mostly to accessing loans in general and affordable/low(er) interest loans in particular. Profitability was also an important fund-related challenge mostly due to the increase in the cost of business inputs such as supplies, goods, and labour. As for labour-related challenges, the focus was mostly on finding qualified workers, and related to this, retaining staff.

Business owners and senior managers feel the Government of Canada can best support SME’s in the short term by improving access to low-interest loans and grants, through wage subsidies, lowering business taxes, additional tax credits related to hiring and training, and by generally making it easier for businesses to qualify for these various forms of support.

Awareness of current federal programs designed to help support small and medium-sized businesses is moderate at best. Many seemed to be aware that programs and supports exist although they are hard-pressed to name them specifically.

Nearly all participants agreed that better knowledge of available programming would benefit their business. Suggested channels for increasing awareness included social media, mass media, more/better promotion on the Government of Canada website, mailers, working through the CRA, subscribing to an email bulletin or newsletter, and collaborating with local business groups.

Reactions to proposed advertising concepts

Participants were presented four campaigns (Concept 1A, Concept 1B, Concept 2, and Concept 3). Summary reactions to each concept are presented below.

Concept 1A – Uncomplicated – magic ball

Concept 1A received mostly moderate to low appreciation scores. The general reactions to this concept included the following:

- Some participants, particularly the younger businesses participants, did not understand the reference or the use of a magic 8-ball.
- Many who recognized the magic 8-ball felt that the ad was designed to support business owners who did not know what they were doing or were resorting to luck to run their business, which they did not relate to.
- The concept was seen by some as overly broad and not speaking to the specific needs or business problems they have.
- Participants enjoyed the last two scenes of the video storyboard where participants could see the possibility of an interactive website or tool they could use to find supports, as well as the reference to “unique business challenges”.

Concept 1B – Uncomplicated – Business Benefits Finder Tool

Concept 1B received moderately positive appreciation scores and often outperformed Concept 1A. The general reactions to this concept included the following:

- The concept was considered straightforward, easy to follow and highly relatable for business owners / managers because of the various keywords used.
- Some appreciated the potential glimpse of what to expect in terms of user interface of the website to which the ad would take them if they clicked through.
- More than twice as many participants would click on Concept 1B compared to Concept 1A.
- Mixed reactions were heard regarding the two static ad approaches. Most did prefer “Option 1” (drop-down menu) mostly because it allowed them to better understand the range of possibilities. Those who preferred the “simple way” in Option 2 felt it was less cluttered and generally more appealing.
- Participants were clearly in favour of Concept 1B when it came to the preferred video approach.
- Some were disappointed that the ads were not interactive.

- Appreciation for “support” and “funding and resources” was generally split with a seemingly slight advantage in favour of “funding and resources.”

Concept 2 – Don’t problem solve alone

Concept 2 received a wide range of appreciation scores leading to a mildly positive overall rating. The general reactions to this concept included the following:

- Many felt that the concept was highly relatable.
- Some felt that the concept seemed more like an ad for mental health support for business owners than one for business solutions specifically. Participants would have preferred to see business owners actively trying to solve their business problems rather than seeing them struggle alone in the middle of the night.
- Also, some felt the concept was too negative overall and overly focused on fixing problems – without actually showing much of a solution. There was a sense that business owners are always looking for opportunities which could be related to business problems as much as they could be related to something positive such as expansion, developing new markets, etc.
- Some, who sensed the concept was too broad, would have preferred references to specific business problems and/or specific forms of support.
- Having different genders in the campaign was viewed positively.

Concept 3 – At your fingertips

Concept 3 also received a wide range of appreciation scores leading to a mildly positive overall rating. The general reactions to this concept included the following:

- The variety of forms of support featured in the ad were appreciated and seen as relevant. Many also liked the suggestion, through the use of the keyboard image, that the support is easily accessible and “at their fingertips.”
- Others felt the concept was too cluttered and busy which made it difficult to read all of the forms of support. Some also felt the ad would take them to a website that would overwhelm them due to all of the forms of support. The reference to “hundreds” in the second static ad reinforced these sentiments.

- Some would have preferred a clean list of forms of support rather than blending them into a keyboard visual. Similarly, the use of short statements on coloured keyboard keys was something that worked well but only if the message on the key was short. A few suggested that statements like “Get support right at your fingertips” would be more appealing on a coloured keyboard key.

Summary reactions to the campaign

Participants were asked to cast two final votes based on two different questions. They were asked to select across the four concepts presented:

When asked which concept they felt was most appealing to them and the one most likely to compel them to click through to the website, voting was in slight favour of Concept 3, with Concepts 1B and Concept 2 then tied for second place.

Participants were then asked which ad concept was most effective at generating awareness that the government offers easy access to a wide variety (hundreds) of programs and services to help SMEs address their business needs. For this scenario, votes were nearly evenly split between Concept 1B and Concept 3, with Concept 2 a distant second.

Summary reactions to a mock-up of the the Business Supports landing page

Before seeing the the Business Supports landing page concept, participants would hope the landing page would be simple, easy to navigate and allow them to quickly find the forms of support relevant to their business. Some suggested it should feature a prominent search bar, it could include a mini-questionnaire so that they could easily profile their business or their business needs/challenges, and a simple menu of the various forms of supports.

Once presented with the mock-up, reactions were for the most part favourable. Some of the aspects of the design participants appreciated the most included:

- It seemed easy to navigate and not overwhelming;
- The site provided a clear path to the different ways in which one could obtain information or contact the Government of Canada;

- Some were pleasantly surprised that there is a mobile application;
- Being able to subscribe to a newsletter to be informed about business supports from the Government of Canada was appreciated.

Some of the concerns raised by participants included:

- Uncertainty whether the content in the mobile app would be the same as on the web;
- They are not seeing the “fill in the blank” tool that was featured in the advertising concepts;
- Many were intrigued by connecting with an expert although some were skeptical that about the knowledge of these experts as well as potential wait times. Some would have liked to be able to email an expert.
- Many suggested adding a chat feature.
- A reference to the Business Benefits Finder could be made in the ad concepts.

In the end, nearly all participants felt this would be a website they would want to explore.

Finally, reactions to the proposed URL (Canada.ca/BusinessSupports and Canada.ca/soutienauxentreprises) were either positive or neutral. Many who liked it felt it was simple and memorable. A few explained that they don’t typically pay attention to URL names since they use bookmarks. Of the few concerns raised, it was mostly to do with how often the letter “s” appears in the English URL and the length of the French URL.

Qualitative Research Disclaimer

Qualitative research seeks to develop insight and direction rather than quantitatively projectable measures. The purpose is not to generate “statistics” but to hear the full range of opinions on a topic, understand the language participants use, gauge degrees of passion and engagement and to leverage the power of the group to inspire ideas. Participants are encouraged to voice their opinions, irrespective of whether or not that view is shared by others.

Due to the sample size, the special recruitment methods used, and the study objectives themselves, it is clearly understood that the work under discussion is exploratory in nature. The findings are not, nor were they intended to be, projectable to a larger population.

Specifically, it is inappropriate to suggest or to infer that few (or many) real world users would behave in one way simply because few (or many) participants behaved in this way during the sessions. This kind of projection is strictly the prerogative of quantitative research.

Research findings – quantitative phase

Pre-campaign ACET survey

Unaided ad recall

Many business respondents (41%) claimed to recall a Government of Canada advertisement over the three week period preceding their participation in this study. The most frequently cited elements of the advertisement related to government programs or services (15%), followed by various environmental actions (9%), political messaging (7%), or tax programs and benefits (7%).

Campaign recall

A total of 18% claimed to recall a Government of Canada advertisement specifically highlighting easy access to hundreds of government programs and services to help SMEs address their business needs. Most claimed to have engaged with the advertisement via digital media (63%), primarily through Google (26%) or YouTube (24%). Many recalled engaging with the advertisement on television (45%), radio (21%), or printed materials (12%).

Among those who claimed to recall seeing a campaign advertisement, 34% described elements of business assistance or support, while additional mentions included advertising for the Business Development Bank of Canada (9%), or various public services (6%).

Business outlook

When asked to rate the overall health of their business, 56% of described overall business health as good, while fewer provided neutral (29%) or poor (12%) ratings. The top three biggest challenges facing businesses included the cost of goods and services (37%), increasing profitability (31%), and marketing or customer base challenges (29%).

Government support

Many business respondents agreed that the Government of Canada has programs that support Canada's SMEs through business loans (51%), offers a wide variety of programs to support businesses (47%), has programs that support SMEs through access to funding (45%), and has programs that support SMEs to start-up a new business (45%).

Agreement was lowest when asked whether the Government of Canada understands the challenges facing Canadian businesses (35%), has programs supporting customer development outside of Canada (37%), and has programs supporting SMEs through wage subsidies (38%).

The Government Support Index (GSI) was developed to produce an overall score based on the agreement scores provided using the following calculation:

$$\text{GSI} = \text{SUM} [\text{business loan programs} + \text{wide variety of programs} + \text{start up} + \text{access to funding} + \text{tax credits} + \text{R\&D capabilities} + \text{scale up} + \text{wage subsidies} + \text{customers outside Canada} + \text{understands business challenges} / \text{\# of valid answers provided (score of 1 to 5)}]$$

Results from this exercise reveal that, on average, 40% of business respondents agree that many or most of the various forms of support are being provided by the Government of Canada. Support is mixed for about 36% of businesses while roughly 23% of businesses would feel that most if not all forms of support are not provided by the Government of Canada.

Business priorities

The Government of Canada business-related priorities garnering the most support included having a competitive business tax regime (70%), improving high-speed internet access (70%), providing assistance accessing financing (64%), and improving the government's online service experience for businesses (64%).

Perceived importance was lowest when it came to investing in domestic manufacturing (56%), encouraging green technology incentives (56%), helping businesses access new markets (57%), and investing in infrastructure (57%).

The Business Priority Index (BPI) was developed to produce an overall score based on the importance scores provided using the following calculation:

$$\text{BPI} = \text{SUM} [\text{tax regime} + \text{financing} + \text{high-speed internet} + \text{online services} + \text{scale up} + \text{digital technologies} + \text{economic development} + \text{innovation} + \text{fair competition} + \text{infrastructure} + \text{intellectual property} + \text{manufacturing} + \text{new markets} + \text{green technology} / \text{\# of valid answers (scores of 1 to 5)}]$$

Based on this calculation, 64% of respondents consider the full range of priorities explored in the survey at least important. Results were a bit more mixed for 25% of businesses while a small group, 10%, would generally say that, on average many or most of the priorities proposed were not important.

Government performance

Having established how important the various priorities are to businesses, they were then asked to assess how well they feel the Government of Canada is performing on these same priorities. The Government of Canada was perceived as performing strongest (scores of 4 or 5) when it comes to improving high-speed internet access (39%), encouraging businesses to innovate (36%), incentivizing green technology investment (35%), and helping businesses access funding (35%).

Performance ratings were lowest (scores of 1 or 2) when it comes to having a competitive business tax regime (29%), promoting fair competition (27%), and helping businesses access funding (24%).

The Government Performance Index (GPI) was developed to produce an overall score based on the performance scores provided using the following calculation:

$$\text{GPI} = \frac{\text{SUM [tax regime + financing + high-speed internet + online services + scale up + digital technologies + economic development + innovation + fair competition + infrastructure + intellectual property + manufacturing + new markets + green technology / \# of valid answers (scores of 1 to 5)]}}{\# \text{ of valid answers (scores of 1 to 5)}}$$

Based on this calculation, 33% of businesses felt that the Government of Canada was performing well across the full range of priorities explored in the survey. Most businesses felt that the government was performing moderately well (42%), while 22% would say that, on average the government was performing poorly across most business support priorities.

Government program aided familiarity

When presented with a list of federal programs, aided familiarity was highest for the Canada Small Business Financing Program (34%), followed by the Women Entrepreneurship Strategy (28%), the Strategic Innovation Fund (25%), CyberSecure Canada (24%), and Innovative Solutions Canada (24%).

Familiarity was lowest for the 50-30 Challenge (14%), Biomanufacturing (16%), the Innovation Superclusters Initiative (18%), the Accelerated Growth Service (18%) and the Venture Capital Catalyst Initiative (18%).

The Government Program Familiarity Index was developed to produce an overall score based on awareness across the entire set of programs. Those that were at least somewhat familiar with at least 10 of the 18 programs were considered highly familiar overall, while those aware of 3 to 9 programs were considered moderately familiar, with low familiarity categorized as 2 or fewer.

Few business respondents (5%) could be considered highly familiar overall, with another 11% considered moderately familiar with government programs. Most business respondents (84%) were aware of 2 or fewer programs supporting SMEs. A total of 18% of business respondents were not aware of a single government program supporting SMEs.

Post-campaign ACET survey

Unaided ad recall

Half of business respondents (50%) claimed to recall a Government of Canada advertisement over the three week period preceding their participation in this wave of the study, increasing from the pre-campaign wave (41%). The most recalled elements of the advertisement related to tax programs and benefits (23%), followed by various government programs or services (18%), financial assistance (7%), the economy (5%), or environmental actions (4%).

Campaign recall

A total of 19% claimed to recall a Government of Canada advertisement specifically highlighting easy access to hundreds of government programs and services designed to help SMEs address their business needs. Most claimed to have engaged with the advertisement via digital media (64%), primarily through a generic website (28%), or Google (25%). Many recalled engaging with the advertisement via television (45%), radio (21%), or printed materials (13%).

Overall, results were nearly identical to those observed in the pre-campaign wave (18%), including a similar distribution of advertising sources.

Among those who claimed to recall seeing a campaign advertisement, 35% described elements of business assistance or support, a nearly identical result compared to the pre-campaign wave (34%). Awareness of business assistance programs generally increased compared to the pre-campaign wave, most notably recall that the government has different programs that help small and medium businesses (up to 22% from 13%).

Business outlook

Business respondents in the pre-campaign wave were more likely to describe their overall business health as good compared to the post-campaign wave (56% vs. 47%). In the post-campaign wave 30% provided a neutral rating, while 22% provided a poor rating. Remaining consistent with the pre-ACET wave, the three most common challenges facing businesses were the cost of goods and services (37%), increasing profitability (32%), and marketing or customer base challenges (27%).

Government support

Many business respondents agreed that the Government of Canada has programs that support Canada's SMEs through business loans (44%), has programs that support SMEs through tax credits (42%), has programs that support SMEs to start-up a new business (41%), has programs that support SMEs through access to funding (40%), and offers a wide variety of programs to support businesses (40%).

Agreement was lowest when asked whether the Government of Canada understands the challenges facing Canadian businesses (28%), has programs supporting customer development outside of Canada (28%), has programs supporting SMEs to scale up (31%), and has programs supporting SMEs through wage subsidies (32%).

The Government Support Index (GSI) was developed to produce an overall score based on the agreement scores provided using the following calculation:

$$\text{GSI} = \frac{\text{SUM} [\text{business loan programs} + \text{wide variety of programs} + \text{start up} + \text{access to funding} + \text{tax credits} + \text{R\&D capabilities} + \text{scale up} + \text{wage subsidies} + \text{customers outside Canada} + \text{understands business challenges}]}{\text{\# of valid answers provided (score of 1 to 5)}}$$

Results from this exercise reveal that, on average, 32% of business respondents agree that many or most of the various forms of support are being provided by the Government of Canada. Support is mixed for about 39% of businesses while roughly 28% of businesses would feel that most if not all forms of support are not provided by the Government of Canada.

Business priorities

The Government of Canada business-related priorities garnering the most support included improving high-speed internet access (68%), having a competitive business tax regime (68%), providing assistance accessing financing (68%), and improving the government's online service experience for businesses (67%).

Perceived importance was lowest when it came to encouraging green technology incentives (53%), investing in domestic manufacturing (54%), promoting Canada as a place to do business (56%), and investing in infrastructure (58%).

The Business Priority Index (BPI) was developed to produce an overall score based on the importance scores provided using the following calculation:

$$\text{BPI} = \frac{\text{SUM [tax regime + financing + high-speed internet + online services + scale up + digital technologies + economic development + innovation + fair competition + infrastructure + intellectual property + manufacturing + new markets + green technology + Team Canada]}}{\text{\# of valid answers (scores of 1 to 5)}}$$

Based on this calculation, 64% of businesses consider the full range of priorities explored in the survey at least important, identical to results observed in the pre-campaign wave. Results were mixed for 28% of businesses while 8% would generally say that most of the proposed priorities were not important.

Government performance

Having established how important the various priorities are to businesses, they were then asked to assess how well they feel the Government of Canada is performing on these same priorities. The Government of Canada was perceived as performing strongest (scores of 4 or 5) when it comes to promoting Canada as a place to do business (33%), incentivizing green technology investment (33%), improving high-speed internet access (32%) and encouraging businesses to innovate (31%).

Performance ratings were lowest (scores of 1 or 2) when it comes to having a competitive business tax regime (40%), improving the government's online service experience (33%), promoting fair competition (31%) and investing in domestic manufacturing (31%).

The Government Performance Index (GPI) was developed to produce an overall score based on the performance scores provided using the following calculation:

$$\text{GPI} = \frac{\text{SUM [tax regime + financing + high-speed internet + online services + scale up + digital technologies + economic development + innovation + fair competition + infrastructure + intellectual property + manufacturing + new markets + green technology + Team Canada]}}{\text{\# of valid answers (scores of 1 to 5)}}$$

Based on this calculation, 27% of businesses felt that the Government of Canada was performing well across the full range of priorities explored in the survey, decreasing compared to the pre-campaign wave (33%). Most businesses felt that the government was performing moderately well (42%), while 29% would say that, on average the government was performing poorly across most business support priorities.

Government program aided familiarity

When presented with a list of federal programs, aided familiarity was highest for the Canada Small Business Financing Program (38%), followed by the Women Entrepreneurship Strategy (30%), and CyberSecure Canada (28%).

Familiarity was lowest for the 50-30 Challenge (12%), Biomanufacturing (17%), the GC Business Insights Newsletter (17%), and the Global Innovation Clusters (17%).

The Government Program Familiarity Index was developed to produce an overall score based on awareness across the entire set of programs. Those that were at least somewhat familiar with at least 10 of the 18 programs were considered highly familiar overall, while those aware of 3 to 9 programs were considered moderately familiar, with low familiarity categorized as 2 or fewer.

Few business respondents (6%) could be considered highly familiar overall, with another 13% considered moderately familiar with government programs. Most business respondents (81%) were aware of 2 or fewer programs supporting SMEs. A total of 13% of business respondents were not aware of a single government program supporting SMEs.

Awareness and understanding of campaign

After being presented with a series of campaign specific advertisements (specifically highlighting easy access to hundreds of government programs and services designed to help SMEs address their business needs), 13% of business respondents reported having seen at least one related advertisement over the past few months.

A total of 80% of business respondents who recalled one of the presented campaign advertisements specified that they engaged with the advertisement via digital media, most notably a generic website (43%) or YouTube (35%). Fewer recalled seeing the advertisement on billboards (17%), the radio (11%), in magazines (10%), or on television (5%). Digital billboards were among the most cited sources of OOH campaign specific advertising (15%).

When asked to explain what they felt the ads were trying to communicate, most respondents felt the advertisements spoke especially of the variety of services available to support businesses of varying sizes (61%). Many business respondents cited a variety of general support options to help businesses succeed (17%), or that the advertisements were promoting ease of access to government programs or services (16%).

In terms of how the advertisements were perceived, most business respondents agreed that the advertisements were covering an important topic (75%) and demonstrated political neutrality

(74%). Slightly fewer, but still a majority, agreed that the advertisements provide new information (68%), clearly convey the government is helping businesses access programs and services to help address their business needs (65%), are relevant (55%) and capturing their attention (51%). Few respondents agreed that the campaign advertisements were difficult to follow (18%).

Supplier name: Quorus Consulting Group Inc.

PSPC contract number: 050-23

Contract award date: September 15, 2023

Contract value (including HST): \$217,609.75

For more information, please contact Innovation, Science and Economic Development Canada at:

IC.PublicOpinionResearch-Recherchesurlopinionpublique.IC@canada.ca

Background and research objectives

Innovation, Science and Economic Development Canada (ISED) works with Canadians in all areas of the economy to improve conditions for investment, enhance Canada's innovation performance, increase Canada's share of global trade and build a fair, efficient and competitive marketplace. The department's mission is to foster a growing, competitive and knowledge-based Canadian economy.

The Project Authority is the Strategic Communications and Marketing Sector (SCMS) of ISED. SCMS assists in adapting and refining messaging and content to align with Government of Canada communications policies, while ensuring that the content speaks to Canadians.

Currently, up to half (50%) of Canadian SMEs are not aware of the programs and services put in place by the federal government to help them. This lack of awareness is a significant issue, and many SMEs need help navigating the uncertain economic environment in order to take advantage of the funds, resources and tools available. (Source: ISED Canadian digital adoption program, business – advertising campaign evaluation tool (ACET) : final report).

Generally, the Business Support Campaign (BSC) aims to generate greater awareness of the government's available support and showcase its ease of access. More specifically, the campaign aims to:

- Increase entrepreneur and SME awareness and uptake of the Government of Canada programs;
- Increase awareness of specific funding and services available to Canada's businesses and entrepreneurs in support of innovation, scientific research and entrepreneurship; and,
- Meet Canada's goal of strengthening the economy and establishing Canada as a world leader in innovation, technology, and entrepreneurial activity.

This research will help to drive entrepreneurs, businesses, and companies who are considering starting up, scaling up or exporting to [the Business Supports landing page](#) where they can access targeted information on programs and services.

In an effort to promote the programs and services, ISED developed an advertisement campaign. The primary research objectives in relation to this campaign are to test the concepts and underlying messages through the engagement of micro, small and medium business owners in online (virtual) focus groups and interviews, to determine, for each identified business audience, the

- reactions towards and insights on proposed advertising concepts;
- reactions towards and insights on organic marketing concepts;
- level of understanding of the overall messaging;
- overall understanding and credibility of the messages presented;
- preference towards the proposed concepts, by target audience; and,
- perceptions of any barriers to accessing the programs and services.

The research will be used to help select and develop creative concepts for this campaign by seeking feedback from the campaign's intended audience. This feedback will help determine which messaging works best to raise awareness of the Business Supports landing page and which creative works best to inspire confidence that the ad will generate sufficient interest amongst SMEs in the target audience to respond its call to action and access the government business support programs highlighted on that page.

Beyond the concepts and messages tested, there was also a need to understand how businesses themselves view the advantages, opportunities and challenges of accessing the programs and services provided by the Canadian government. To that end, the research gathered information on business owners' outlook on the current business environment, including their current understanding, priorities, needs and challenges with accessing the programs and services provided by the Canadian government.

Research findings - focus groups and depth interviews

Current challenges and priorities

When asked to describe the main challenge their business is facing these days, most businesses described challenges related either to access to funds or to labour.

Access to money was a key concern and tended to touch on either profitability or access to funds in general. In terms of funds, access to low-interest loans specifically and to loans in general were common sub-themes. These issues seemed more acute among micro/small companies, and, within this segment, the most vocal tended to be young entrepreneurs and start-ups. These businesses explained how the lack of a sales or experience track record and a lack of assets made it nearly impossible to access loans from traditional financial institutions. Businesses also explained how the current interest rate environment made it difficult to obtain affordable funding. Businesses also described tighter profit margins because of higher costs, in particular the higher cost of supplies, goods, labour, and, as noted above, interest rates.

When describing their labour-related challenges, businesses either tended to touch on employee retention or on issues finding qualified workers. A highly competitive labour market appears to be at the root of most of these challenges. Limited access to funds also makes it difficult for some companies to either retain or attract the staff they need or to upskill employees to the skill level needed. In more remote regions, including the territories, businesses explained how there simply is not enough labour in their area to fill the demand. All these issues seemed to overlap in certain industries such as construction where strong demand in combination with low supply have resulted in very challenging labour scenarios for business owners.

Examples of other challenges raised included:

- too much regulation (for instance in industries such as the arts and financial services),
- lack of protectionist measures and support for arts-related industries,

- a lack of transparency in government contracts that should be for designated groups, such as Indigenous,
- the challenges (and opportunities) stemming from artificial intelligence,
- developing / growing their client base domestically and outside Canada.

Finally, there were also quite a few participants who mentioned the current overall economic and business climate as their main challenge.

In light of the various challenges they face, business owners and senior managers were invited to recommend how they believe the Government of Canada could support SME's in the short term. Suggestions generally focused on the challenges businesses face regarding funds and labour. For instance, participants felt the federal government could support them by improving access to low-interest loans, grants, wage subsidies, lowering business taxes, and additional tax credits related to hiring and training.

Some participants did acknowledge that the federal government does provide a variety of supports. That said, businesses also felt that some of the more helpful supports provided during the COVID-19 pandemic had either ended or were going to end. As well, there was a sense that the criteria to qualify for some of the current federal government supports was too narrow or the time needed to find the right kind of supports or to sift through and complete the required forms was too time consuming.

[Awareness of federal supports](#)

Awareness of current federal programs designed to help support small and medium-sized businesses is moderate at best. Many seemed to be aware that programs and supports exist although they are hard-pressed to name them specifically. Some did recall supports available to them during the COVID-19 pandemic, which a few were able to name. As well, a few business owners and senior managers among specific designated segments such as Indigenous, women and individuals living with a disability were aware that certain business supports were specifically designed to support businesses like theirs.

When prompted, nearly all participants agreed that better knowledge of available programming would benefit their business. A few did, however, point out that greater awareness is only part of the challenge. They specified that becoming aware of supports

is of little value if they still need to navigate dense websites, meet stringent eligibility criteria and/or fill out excessive forms.

When it comes to increasing awareness of federal supports, participants recommended a variety of channels. Some of the suggestions included the following:

- Social media, in particular LinkedIn and X/Twitter
- Mass media, such as television, in the news, public transportation posters
- More/better promotion of business supports on the Government of Canada website since that is where businesses generally go to find information,
- Sending material in the mail directly to business owners since the federal government knows the address of their place of business and the type of business they operate. As such, they could target mail-outs promoting specific supports to the businesses that are most likely to need or qualify for those supports.
- There could be greater collaboration with the Canada Revenue Agency since this department is the most familiar with the business activities and financial situation of Canadian businesses. Furthermore, they could leverage the MyBusinessAccount portal to promote supports.
- Subscribing to some sort of federal government email bulletin or newsletter, and,
- Collaborating with local business groups such as Chambers of Commerce, and Community Business Development Corporations (CBDC's) (in Atlantic Canada).

Reactions to proposed advertising concepts

Before seeing the concepts, participants were provided the following context: the Government of Canada will be conducting a national advertising campaign to improve awareness of programs it offers to support businesses. The goal is to make these resources easily accessible to businesses, enabling them to take advantage of available supports so they can better navigate the current economic environment all in one place.

Participants were presented four concepts for the campaign that each consisted of an animated storyboard to convey the video concept being considered and examples of possible static advertisements. Participants were not provided with the concept names,

they were just shown a generic name such as Concept 1A, Concept 1B, etc. The following four concepts were presented:

- **Uncomplicated – magic ball** (Concept 1A), which consisted of one animated storyboard and one static ad
- **Uncomplicated – Business Benefits Finder Tool** (Concept 1B), which consisted of one static storyboard and two creative approaches for the static ad, each consisting of two examples
- **Don't problem solve alone** (Concept 2), which consisted of one animated storyboard and two examples of a static ad approach
- **At your fingertips** (Concept 3), which consisted of one animated storyboard and two examples of a static ad approach.

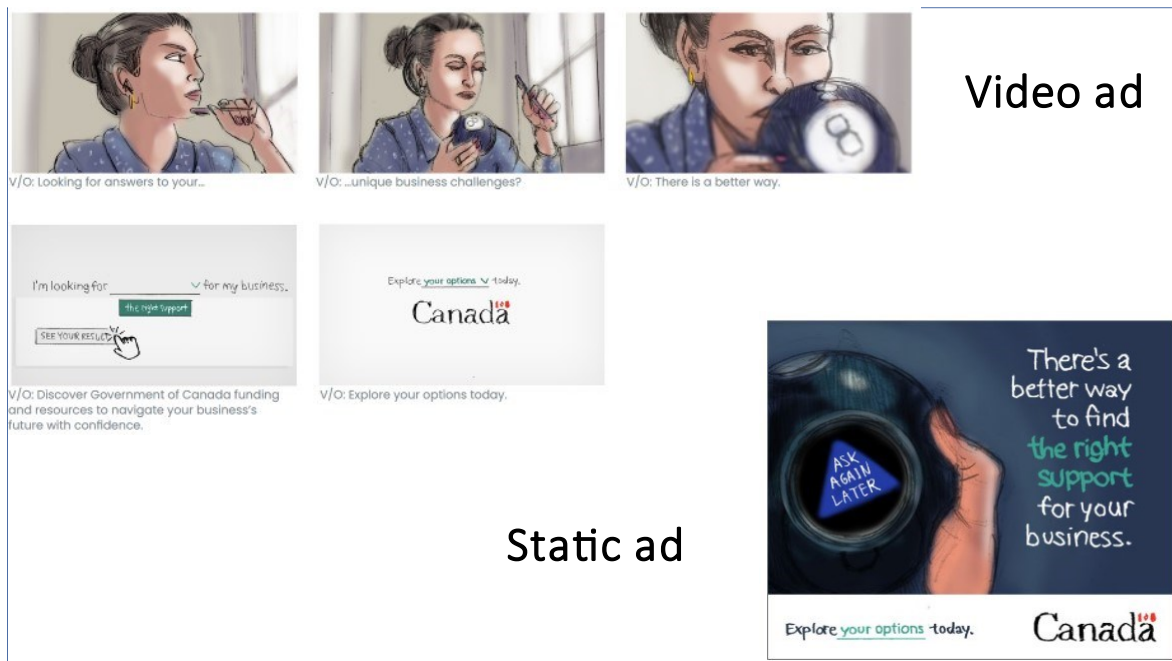
Participants were also given the following explanations:

- The concepts are draft versions and not yet finalized.
- For each concept, they will see animated storyboards for a short video, which could appear on webpages they visit or on social media. The voiceover and music they will hear in some of these concepts are placeholders for testing. The selection of the final music and voice over will be completed once a final concept has been selected.
- If the Government of Canada decided to move forward with any of the video ad concepts, they would be professionally produced with actors, etc. The video ad concepts currently being considered by the Government of Canada are 15-second video ads.
- For each concept, they would also be shown matching static ads designed to complement the video and which would appear on webpages they visit or on social media, including business pages.
- Participants were reminded that if they were to see these ads online, they would be able to click on them to get more information. That said, any reference to a portal in the concepts (such as "urlhub.ca") is a placeholder and that a portal name would be selected once a final concept has been selected.

The order in which the concepts were shown was randomized, except for concepts 1A and 1B, which were always presented one after the other. Animated storyboards were always shown twice. Details on the order of concepts shown per session are available in the appendix in the Moderator’s Guide.

Concept 1A - Uncomplicated – magic ball

This concept consisted of an animated storyboard and one example of a static ad.



This concept received mostly moderate to low appreciation scores with most participants scoring this concept somewhere between 3 and 6 on a 10-point scale (where a rating of 10 was the most favourable rating).

Most of the feedback revolved around the use of an 8-ball in the concept. Not all participants understood the reference or the use of a magic 8-ball leaving many wondering why the business owner is holding a billiards ball. This misunderstanding of the concept seemed to be age-related, with most of the younger business participants not knowing why this prop was used in the concept.

Among those who did recognize the magic 8-ball, most did not feel it was a strong message or concept. More specifically, participants seemed to feel that the government

was offering support to business owners who did not know what they were doing or were resorting to luck, in this case using a magic 8-ball, to run their business. Participants could not relate to this type of business owner since this is not how they run their business. As well, some felt the overall message diminished the value of the support being offered by the federal government since it seemed to suggest that support from the federal government is better than plain luck. A few also did not like the text in the magic 8-ball in the static ad that reads “Ask again later” since it seemed to suggest that this is what they will have to do when they search for government supports for their business – they will be led to a government website that will force them to go through an iterative process to obtain support for their business.

A few who recognized the magic 8-ball felt the concept was too commercial (in other words, it looks like the government is trying to sell consulting services), the magic 8-ball is “cheesy” and is not memorable, and that the call to action is weak.

Finally, some who did not appreciate this concept felt the overall message was too broad and did not speak to the specific needs or business problems they have.

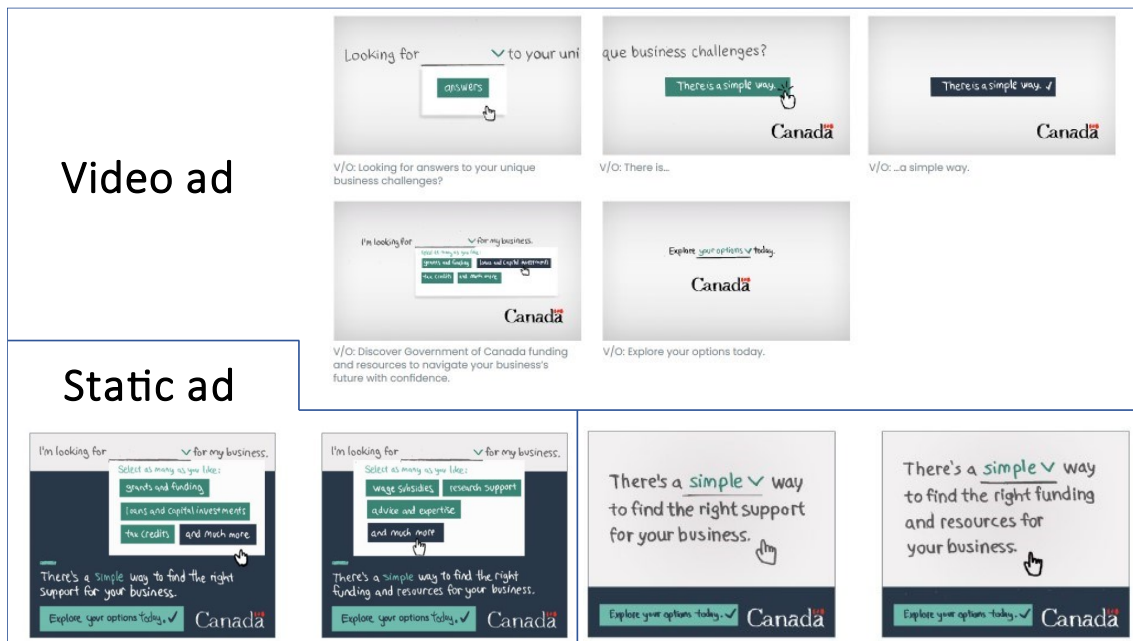
While most did not like this concept, it did have some redeeming qualities that some participants appreciated.

- Some liked the opening scene in the video storyboard where we see a pensive business owner.
- Some female participants also appreciated that the concept featured a female business decision maker.
- The last two scenes of the video storyboard were also appealing since participants could see the possibility of an interactive website or tool they could use to find supports.
- Some participants highlighted key words that appealed to them. For instance, reference to “unique business challenges” was appreciated since it left some feeling that the supports provided might be relevant to their unique business. As well, participants also liked how the concept invited them to “explore” and “discover.”
- The overall message was considered simple and clear – more specifically it featured a clear presentation of a problem and a clear presentation of a solution.

- Use of the magic 8-ball was seen by a few as humorous and creative.

Concept 1B - Uncomplicated – Business Benefits Finder

This concept consisted of a static storyboard and two versions of a static ad, each version consisting of two examples.



This concept received moderate to high appreciation scores with many participants giving this concept an overall rating between 6 and 8 (on a 10-point scale where a rating of 10 was the most favourable rating). As a result, this concept often outperformed Concept 1A.

The strength of this overall concept was derived mostly from its appearance and flow and from the use of relevant keywords for business owners and senior managers. Regarding its appearance, the concept was often commended for having a “clean” appearance, especially the video concept. Furthermore, or perhaps because of its appearance, the concept was also often said to be simple, easy to follow, and streamlined.

The use of various business-related terminology also led many participants to describe the concept as informative and highly relatable. These were particularly appreciated

given how Concept 1A was neither informative nor relatable to most participants. When describing the concept as informative, participants especially appreciated the list of forms of support that were being promoted in the fourth scene of the video concept and in the Option 1 versions of the static ads.

Some participants felt the creative was a bit “cold” and impersonal because it did not feature a business owner or operator. These participants felt that they could more easily relate to or connect with a concept that showed a person. On the other hand, the absence of a main character was something that others appreciated since it focused on the core information that mattered the most to them and left emotional triggers, metaphors and guesswork by the wayside.

The visuals featuring drop-down menus were also liked. Some appreciated that this might be giving them a glimpse of what to expect in terms of the user interface of the website to which the ad would take them if they clicked through.

While most participants tended to have positive comments regarding Concept 1A, a few concerns were also raised. The success and appeal of the concept largely resides in the key words featured – as noted by one participant, if the keywords they see are not relevant to them, they would ignore the ad entirely. A few also felt that the font used and the general layout of the visuals felt “messy,” cluttered and disorganized, which was a turn-off for them. This was especially the case with first examples of the static ads. As noted above, the lack of a human presence left some feeling the concept is “cold” and unappealing. Some were disappointed that the ads were not interactive and that they could not click on specific forms of support featured in the ad. Finally, one participant did not connect with the drop-down menu/fill-in-the-blank approach to using a website.

Despite these opportunities for improvement, in the end, more than twice as many participants would click on Concept 1B compared to Concept 1A.

Reactions to the static ad approaches

Participants were asked to select their preferred static ad approach between the two proposed for Concept 1B.



Generally, mixed reactions were heard regarding the two static ad approaches. Most did prefer “Option 1” (which showed a detailed drop-down menu of forms of support) especially because it allowed them to better understand the range of possibilities. Those who preferred the “simple way” in Option 2 felt it was less cluttered and generally more appealing.

Video preference: 1A vs 1B

Voting was much more one-sided regarding the preferred video approach, clearly in favour of Concept 1B.

Keyword preferences

Among the various key words featured in Option 1, those most likely to capture the target audience’s attention and compel them to click through were: grants and funding, loans and capital investment, tax credits, and wage subsidies. Many generally stated that they preferred the left-hand example over the one on the right-hand. Appreciation for “support” and “funding and resources” was generally split with a seemingly slight advantage in favour of “funding and resources.”

Concept 2 – Don't problem solve alone

This concept consisted of an animated storyboard and two examples of a static ad intended to be used in combination.

The storyboard and static ad examples are arranged in a grid. The top row shows three storyboard panels: a close-up of a car's digital clock showing 2:11, a man sleeping in a car with the clock visible, and a man leaning over the steering wheel with the clock visible. The middle row shows a static ad with a man sleeping and a call to action for urihub.ca, and another static ad with the same call to action on a dark background. The bottom row shows two static ads: one with a man sleeping and a call to action, and another with a woman working on a laptop and a call to action. The text 'Video ad' is positioned to the right of the top row, and 'Static ad' is positioned to the left of the bottom row.

Video ad

Static ad

This concept received a wide range of appreciation scores leading to a moderate to high overall rating. Most votes tended to be between 6 and 8 (on a 10-point scale where a rating of 10 was the most favourable rating).

Those who appreciated it the most felt the concept was highly relatable. More specifically, they could relate to being up at night worrying about some aspect of their business or catching up on some work in the car. Many of the micro and small business owners and senior managers could also relate to feeling alone when tackling business problems. Those in larger companies felt the concept would be more relatable if they showed a team working together to try to solve business problems.

The concept was also praised for being straightforward, simple and easy to understand.

Those who were less inclined to liking this concept felt the concept was too negative overall if not depressing or stress-inducing. Some also explained that although they face challenges, they do not lay in bed watching the clock – they feel they are more active than

passive when faced with challenges. Furthermore, many explained that the concept felt more like an ad for mental health support for business owners than one for business solutions specifically. The language in the static ad was also deemed overly negative given how it emphasizes words like “don’t”, “problem,” “challenges” and “alone.”

As much as many participants could relate to the struggles of problem-solving alone, they would have preferred seeing business owners actively trying to solve their business problems rather than seeing them struggle alone in the middle of the night. In other words, they would have preferred seeing a positive spin to the challenge of problem-solving rather than being reminded of the struggles related to operating a business.

A few also explained that the concept was overly focused on fixing problems without actually showing much of a solution – in other words, the concept lacked balance. In reaction to the concept’s focus on “problems”, a few added that while business owners are admittedly always looking for opportunities which could be related to business problems, they are also looking for opportunities to generate or foster positive developments in their business such as expansion, developing new markets, etc.

Some, who sensed the concept was too broad, would have preferred references to specific business problems and/or specific forms of support.

Given that the concept featured people, some participants felt showing diversity was important and as such, having different genders in the campaign was a step in the right direction. For the most part, participants were also comfortable with the idea of using both proposed static ads as part of the campaign.

In the end, the likelihood of clicking through was mixed across participants.

Concept 3 – At your fingertips

This concept consisted of an animated storyboard and two examples of a static ad intended to be used in combination.



This concept also received a wide range of appreciation scores leading to a fairly positive overall rating. Most votes tended to be between 7 and 9 (on a 10-point scale where a rating of 10 was the most favourable rating).

The key strength of this concept was that it featured a variety of forms of support. At once, this made the ad more relevant (because it referred to the types of support that businesses value) and solution-oriented. By striking a strong balance between “problems” and “solutions”, participants were apt to consider this concept positive (rather than negative like Concept 2).

Many also liked the suggestion, through the use of the keyboard image and the voice-over script, that the support is easily accessible and “at their fingertips.”

Finally, the concept was deemed simple and easy to understand and that the idea that the federal government has many, seemingly hundreds, of forms of support available to businesses was intuitive.

Those who liked it less felt the concept was too cluttered and that they would not be able to read all the forms of support because there are so many in the first scenes and they are not written clearly.

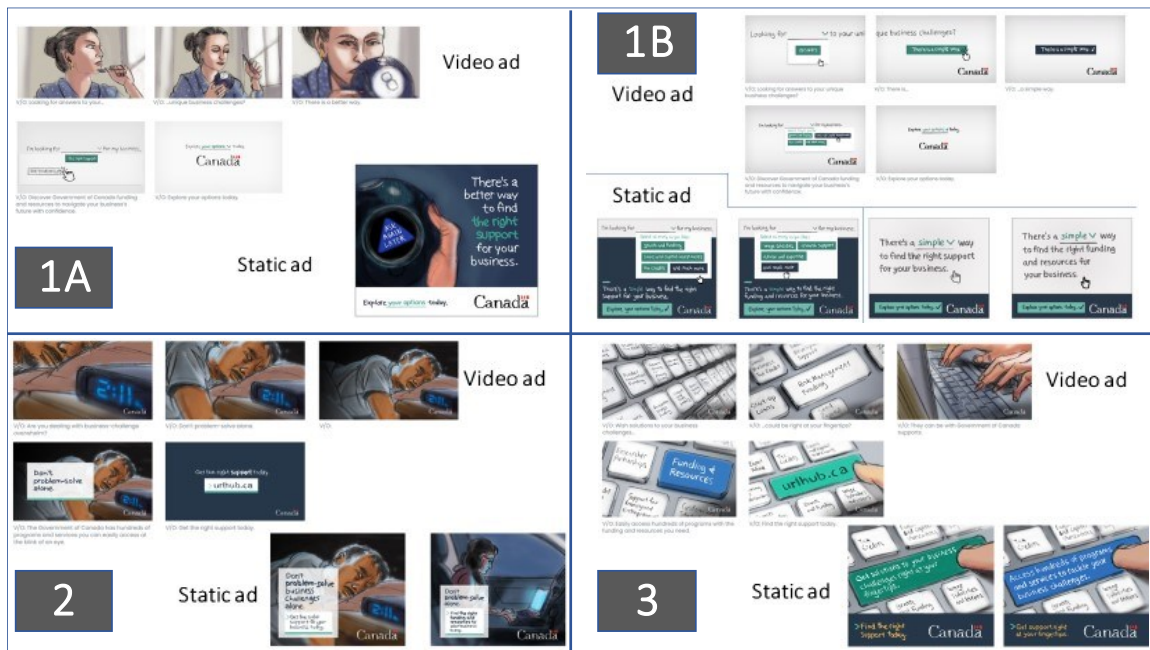
While some liked that the ad suggested a wide variety of forms of support, others felt the ad would take them to a website that would overwhelm them. The reference to “hundreds” in the second static ad reinforced these sentiments. While the ad clearly suggests variety, it does not suggest ease of use – one participant explained that it feels like “homework.”

Some would have preferred a clean list of forms of support rather than blending them into a keyboard visual which made it difficult to focus and read what was written. Similarly, the use of short statements on coloured keyboard keys was something that worked well but only if the message on the key was short. This prompted a few to suggest that statements like “Get support right at your fingertips” would be more appealing on a coloured keyboard key than what is currently featured.

Similar to Concept 1B, a few participants did not like the impersonal tone and would have preferred seeing the face of a business owner/operator.

Summary reactions to the campaign

Participants were asked to cast two final votes based on two different questions. They were asked to select across the four concepts presented:



When asked **which concept they felt was most appealing to them and the one most likely to compel them to click through to the website**, voting was in slight favour of Concept 3 (At your fingertips), with Concepts 1B (Uncomplicated – Business Benefits Finder) and Concept 2 (Don't problem solve alone) then tied for second place.

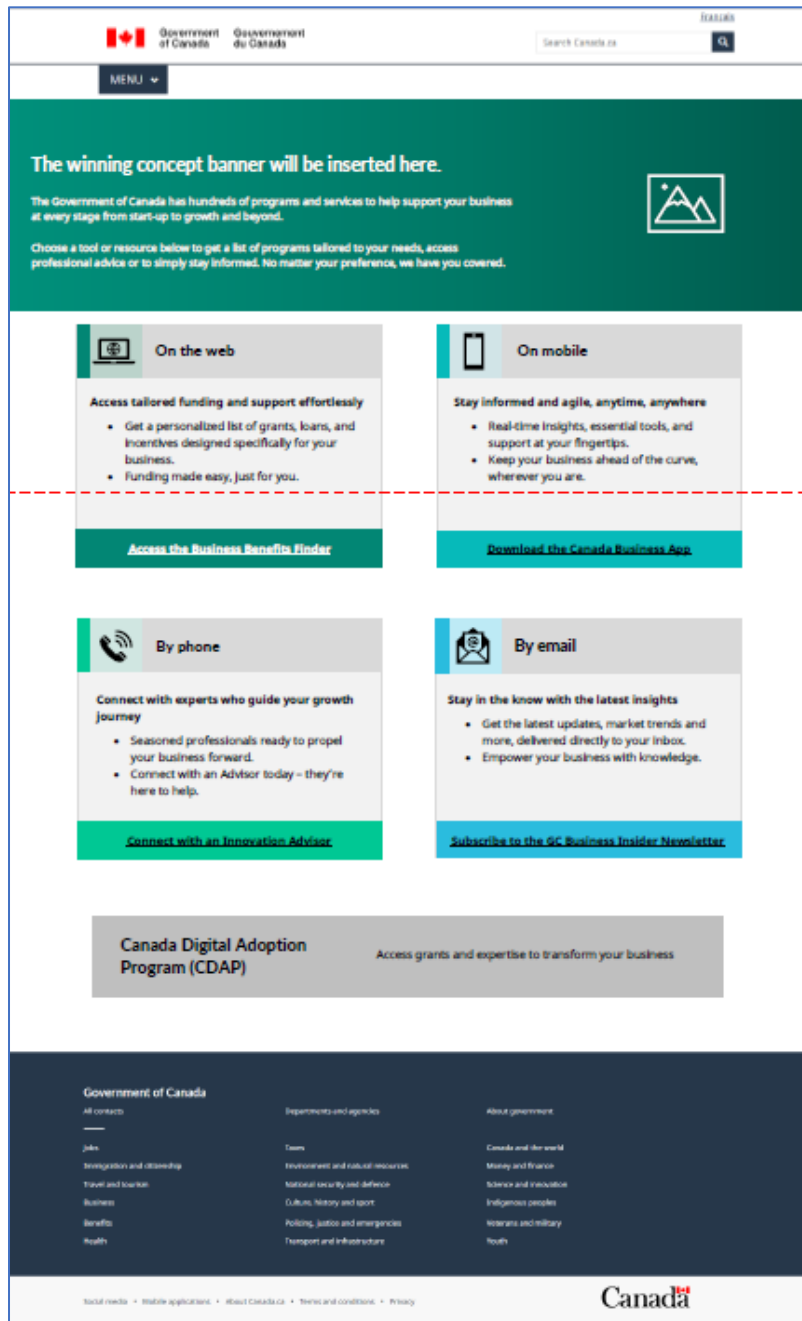
Participants were then asked **which ad concept was most effective at generating awareness that the government offers easy access to a wide variety (hundreds) of programs and services to help SMEs address their business needs**. For this scenario, votes were nearly evenly split between Concept 1B (Uncomplicated – Business Benefits Finder) and Concept 3 (At your fingertips), with Concept 2 (Don't problem solve alone) a distant second.

Summary reactions to a mock-up of the Business Supports landing page

Before being shown a mock-up of the potential Business Supports landing page, participants were asked what their expectations were for what they would like to see or the information they would expect to find.

First and foremost, participants would hope the landing page would be simple, easy to navigate and would allow them to quickly find the forms of support relevant to their business. In particular, they would like to quickly find those supports that they would have seen in the advertising that interested them enough that they clicked on to arrive at the website. Some suggested it should feature a prominent search bar, or that it could include a mini-questionnaire so that they could easily profile their business or their business needs/challenges, and a simple menu of the various forms of supports. Making a direct link to the ads, some said there could be headings or simple sections that replicated the words that were suggested in some of the concepts (i.e., “grants and funding,” “loans and capital investments” etc.) Some thought the landing page would have a list of all supports available, while others felt that would be too much information, and that sections (that would potentially lead to longer lists) or drop-down menus would be more appropriate for a landing page. Very few participants expected that there would be other information, such as contact information, on the landing page.

Following this discussion, participants were shown the following mockup, whereby the red dotted line indicated what would be seen on screen before having to scroll down more (“above the fold”):



Once presented with this mock-up, reactions were for the most part favourable. Some of the aspects of the design participants appreciated the most included that it looked “clean” and easy to navigate and that the information they were hoping for would be there or would be easy to find from there without being overwhelmed with too much

information. Some said it was less “governmentese” than similar Government of Canada websites, which they liked. The idea of the ad in the banner at the top of the page was seen as a good touch. There was also appreciation for the various ways in which people could choose to find the information they were looking for depending on their preference, on how much information they would be looking for, or on the type of device they were using (website vs. app).

Those who indicated they would more likely browse for the information on the web said that they would likely already come to the landing page on their computer or laptop and they would then continue to the “on the web” section. They also said they preferred reading more dense information or fill out forms online rather than on an app. On the other hand, those who indicated preferring the app were often those who preferred formats that worked better on their mobile devices, or they said they were likely to come back to an app more often than to a website. Some questioned whether it would be possible to have the same information on the app as on the web, and wondered how often it would be updated. However, participants appreciated the choice and many said they would potentially use both.

In terms of communications, being able to subscribe to a newsletter aligned with what some had suggested at the beginning of the session as a way for the Government of Canada to keep them informed of available business supports. Quite a few participants indicated that they would likely sign up. There was some expectation or hope that they could receive or sign up for tailored communications that were relevant to their business needs.

Many were intrigued also by connecting with an expert, although some were skeptical that these experts would be knowledgeable enough to know their business. Some were also concerned that, similar to other times they have tried to call a Government of Canada department, the wait time would be too long. This led many to explain that they would likely explore the benefits via the web or the mobile app and if they cannot find what they are looking for or have questions, then they would call an expert. This feature would not be the go-to resource for most.

It was also suggested that emailing said expert would likely be more helpful, and many would like to see the addition of a direct chat feature.

Other suggestions included showing a clearer link between the ad and the webpage. This could be done by adding the “fill in the blank” tool that was featured in the ads to the landing page, or by making a reference to the “Business Benefit Finder” directly in the ads. It was suggested that this could also help draw more people to click on the ad.

In the end, nearly all participants felt this would be a website they would want to explore.

Participants were asked to suggest what key words they would use in a Google search if they wanted to find the business supports portal again in the future. The moderator removed all visuals from the screen for this exercise. An inventory of the proposed key words is provided below (this was not explored in Group 1):

Focus Group	Keywords proposed
Group 2	Canada business help Federal small business resources Small business support Small business grant Ontario Canada business program Govt of Canada business benefit resources
Group 3 (French)	Subventions pme Gouvernement du canada programme subvention Canada subvention Subventions pour les pme gouvernement du canada GOV FED pme assistance Canada grant; Canada small business financing
Group 4	Canadian business support and funding Get Canada small business support Canada business support Funds Government grants
Group 5	Canada business benefits Canada business resources Government of Canada small business Canada business support

Group 6 (French)	Soutien aux PME Soutien PME Soutien gouvernement Soutien gouvernement ou subvention gouvernement Subvention pour PME, crédit pour PME Subvention entreprise gouvernement Subvention PME Québec
Group 7	Govt of Canada small business help Funding option, small business, government of Canada Canadian small business help Canadian business support GC New small business support program for Government of Canada Resources/tools
Group 8	Govt of Canada small business help Canadian government business grants Small business govt support Government of Canada small business solutions Canadian government support page Government of Canada
Group 9	Small business financial aid Canada Business support Canada Canada grant tax credit Business funding resources options, Government of Canada Gov't funding resources
In-depth interviews	Government of Canada help program for businesses Subventions entreprises Gouvernement du Canada; soutien entreprises Gouvernement du Canada

Finally, reactions to the proposed URL (Canada.ca/BusinessSupport and Canada.ca/soutienauxentreprises) were either positive or neutral. Many who liked it felt it was simple and memorable. Of the concerns raised, in the English URL, it was mostly related to having three letters “S” one after another in the middle. While the words were clear, it struck many as odd or just “strange looking” to have the repetitive S’s in the URL, with quite a few participants making long “Ssss” sounds while explaining this. Suggestions for alternatives included adding a hyphen (“Business-Supports”), changing the text slightly (“SupportForBusinesses” or renaming it to another key term used on the site or in the advertisements, such as “BuisnessBenefits”

Among French participants, the length of the French URL was somewhat of a detraction.

However, the URL name would not likely be something that would change people's impressions of the site or would influence their likelihood to visit or revisit it. A few explained that they don't typically pay attention to URL names since they use bookmarks, or they would get to the site by clicking on the ad or through an online search, and would then be interested in the content rather than in the URL.

Research findings – pre-campaign ACET survey

Unaided ad recall

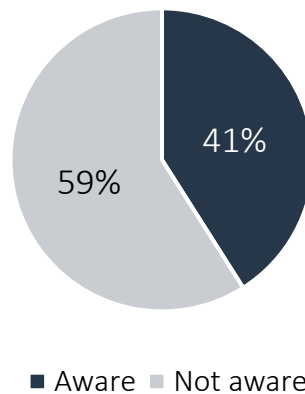
Recent recall of any ad

More than 2 in 5 business respondents (41%) claimed to recall a Government of Canada advertisement over the past three weeks.

The following respondents were more likely to report having seen a Government of Canada advertisement:

- As business size increased, unaided ad recall increased, specifically as business size increased from micro (40%), to small (48%), to medium (64%).
- Men compared to women (49% vs. 34%).

Figure 1 – Recent awareness of Government of Canada advertising – general



Q1. Over the past three weeks, have you seen, read or heard any advertising from the Government of Canada? Base: All respondents, n=706.

Topic recalled

Nearly 2 in 3 business respondents recalled a specific element of the advertisement (61%), most frequently related to government programs or services (15%), followed by various environmental actions (9%), political messaging (7%), or tax programs and benefits (7%).

Figure 2 – Recall of recent Government of Canada advertising – general

Specific mentions of recalled elements over the past three weeks:	Total (n=335)
About the advertisement (Net)	61%
Government programs/public services (Subnet 1)	15%
Programs for seniors (Subnet 1.1)	5%
About CPP/Canada pension plan	3%
Programs for seniors/retirement	2%
Just heard/seen it in newspaper	3%
Housing advertisement/promoting affordable housing	2%
Variety of programs/benefits/public services	1%
Helping mental health issues	1%
Decision regarding the GreenBelt	1%
Health programs (Subnet 1.2)	1%
Dental benefits	1%
Healthcare benefits	<1%
Promoting health/Health Canada	<1%
Services for immigrants	<1%
Environmental actions (Subnet 2)	9%
Action plan for climate change/climate change incentive	6%
Promoting alternative sources of energy (i.e., solar, etc.)	2%
Going green/save the environment/environmental actions	<1%
It was about the Canadian government/political leaders	7%
Taxes (Subnet 3)	7%
It was about taxes (unspecified)	3%
Wasting of taxpayer's money	2%
Carbon Tax Refund /getting rid of the carbon tax	2%
CRA benefits	<1%
Financial assistance (Subnet 4)	5%
Business loan assistance/supporting small businesses	3%
Financial assistance/providing funds for poor	1%
It was about the new pay rate/ workers received some money	1%
About COVID (Subnet 5)	5%
Vaccination for anti-virus/Covid shot	4%
Talking about Covid/awareness of flu season	<1%
Election advertisement/to vote	3%
About BDC/Business Development Bank of Canada	3%
Economy (Subnet 6)	3%
Employment/job creation	2%
Economic stimulus/working on inflation/Cost of living	1%
Information about the war of Israel/Gaza	3%
Negative advertisement about the government/political leaders	2%
About CIDC	2%
Citizenship/Legal rights of Canadian citizen	1%
Promoting Canada tourism	1%
Drug Free Youth Canada	<1%
Other	6%
Nothing	<1%
Don't know/remember	32%

Q2. Think about the most recent Government of Canada advertisement that comes to mind. What do you remember about this ad?
 Base: Respondents that had seen, read, or heard any advertising from the Government of Canada, n=335.

Medium sized business respondents were more likely to remember specific elements relating to government programs or public services compared to micro business respondents (27% vs. 15%).

Campaign recall

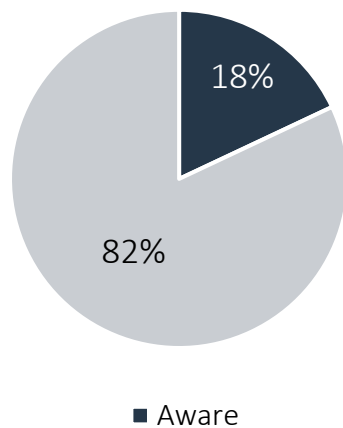
Recent recall of campaign

Nearly 1 in 5 business respondents (18%) claimed to recall a Government of Canada advertisement over the past three weeks, specifically highlighting easy access to hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs.

The following respondents were more likely to report having seen a specific Government of Canada advertisement:

- As business size increased, ad recall increased, specifically as business size increased from micro (16%), to small (29%), to medium (47%).
- Those aged 18 to 34 (32%) and 35 to 54 (28%) compared to those 55 and older (10%).
- Racialized respondents compared to women entrepreneurs (33% vs. 16%).

Figure 3 – Recent awareness of Government of Canada advertising – campaign specific

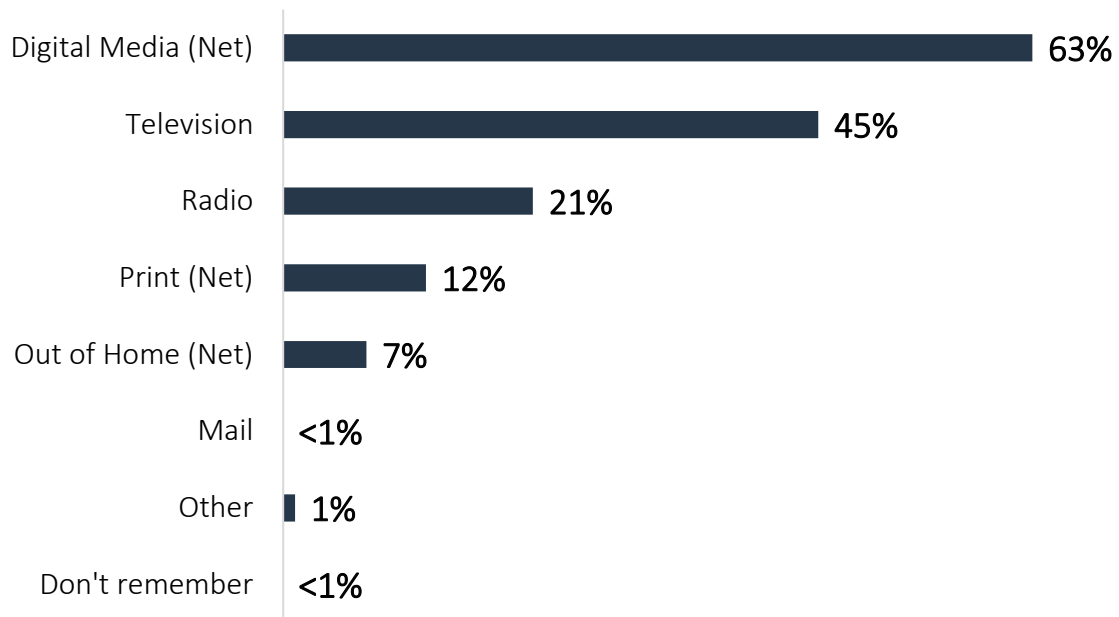


Q3. Over the past three weeks, have you read or heard any Government of Canada advertisements that highlight easy access to hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs?
Base: All respondents, n=706.

Source of campaign advertising

Nearly 2 in 3 business respondents who claimed to recall an advertisement specified that they engaged with the advertisement via digital media (63%). Nearly half recalled seeing the advertisement on television (45%), while fewer cited the radio (21%), or printed materials (12%).

Figure 4 – Summary: Source for Government of Canada advertising – campaign specific



Q4. Where did you see, read or hear this Government of Canada advertisement that highlighted easy access to hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs? Base: Respondents aware of Government of Canada advertising highlighting programs and services for Canadian businesses, n=188.

Those whose business size was small (79%) and medium (82%) were more likely to recall seeing the advertisement via digital media compared to micro business respondents (59%).

Medium sized business respondents were more likely to engage with the following sources compared to micro or small business respondents:

- Print (44% vs. 10%, 17%).
- Out of home (24% vs. 7%, 9%).

Google (26%), YouTube (24%), a generic website, or online newspaper advertisements were the most cited digital media sources.

Figure 5 – Source of Government of Canada advertising – campaign specific

Advertising sources:	Total (n=188)	Micro (n=50)	Small (n=88)	Medium (n=50)
Digital Media (Net)	63%	59%	79%	82%
Google	26%	25%	32%	20%
YouTube	24%	22%	29%	43%
Website	20%	20%	20%	39%
Newspaper (online)	20%	19%	22%	11%
LinkedIn	10%	10%	13%	15%
X (formerly known as Twitter)	9%	9%	10%	18%
TikTok	5%	2%	13%	36%
Spotify	4%	2%	10%	31%
Reddit	3%	2%	5%	12%
Bing	2%	2%	2%	4%
Television	45%	46%	42%	44%
Radio	21%	21%	20%	28%
Print (Net)	12%	10%	17%	44%
Newspapers (Print)	10%	10%	9%	29%
Magazines	5%	4%	9%	20%
Out of Home (Net)	7%	7%	9%	24%
Digital Billboards	6%	7%	2%	16%
Billboards	1%	-	7%	11%
Mail	<1%	-	1%	2%
Other	1%	1%	1%	-
Don't remember	<1%	-	1%	2%

Q4. Where did you see, read or hear this Government of Canada advertisement that highlighted easy access to hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs? Base: Respondents aware of Government of Canada advertising highlighting programs and services for Canadian businesses, n=188.

Medium sized business respondents were more likely to engage with the following specific sources compared to micro and small business respondents:

- Website (39% vs. 20%, 20%).
- TikTok (36% vs. 2%, 13%).
- Spotify (31% vs. 2%, 10%).
- Newspapers (29% vs. 10%, 9%).
- Magazines (20% vs. 4%, 9%).

Campaign topic recalled

Among business respondents who claimed to recall seeing a campaign advertisement over the past three weeks, more than a third described elements of business assistance or support (34%).

Additional mentions included advertising for the Business Development Bank of Canada (9%), various public services (6%), with some mention of business innovation or business growth programs (3%).

Figure 6 – Recall of recent Government of Canada advertising – campaign specific

Specific mentions of recalled elements over the past three weeks:	Total (n=188)
About the advertisement (Net)	66%
Business assistance (Subnet 1)	34%
The government has programs that support small and medium businesses through grants/ incentives for small business	17%
The government has different programs that helps small and medium businesses	13%
The government has programs that support small and medium businesses through business loans	4%
The government has programs that support businesses to start-up a new business	4%
It was for BDC	9%
Government programs/public services (Subnet 2)	6%
Future access to easier rental properties/ low-income housing	4%
The government's efforts to improve the quality of life for its citizens/ benefits for the people	1%
It was about pension/ disability program	<1%
It was about the new pay rate/ workers received some money	<1%
It was about the Canadian government	4%
Business innovation/Business growth (Subnet 3)	3%
The government has programs that support businesses adopt digital technologies	2%
The government has programs that support small and medium businesses to grow to the next level	<1%
Environment protection (Subnet 4)	3%
It was about the environmental fee/ carbon tax	2%
It was about environmental protection/ installation of solar panels for clean energy	1%
Economic growth (Subnet 5)	3%
The government has program that support businesses to generate more employment opportunities	2%
The government helps with the inflation issues/ creates better economy	1%
It was an informative ad	2%
The government is helping other countries / supports Israel	2%
General negative mention about the ad (i.e. depressing, nonsense, too vague, etc.)	2%
It was about Justin Trudeau	2%
Election (Subnet 6)	2%
It was the leader of a party encouraging the people to vote for them/ promoting one party	2%
It was discussing about elections/ voting for a better future	<1%
General positive mentions about the ad (i.e. interesting, good ad, good vibes, etc.)	1%
It was an important ad	<1%
Other	5%
None	<1%
Don't know/remember	25%

Q5. What do you remember about this ad? Base: Respondents that had seen, read, or heard business program and service advertising from the Government of Canada, n=188.

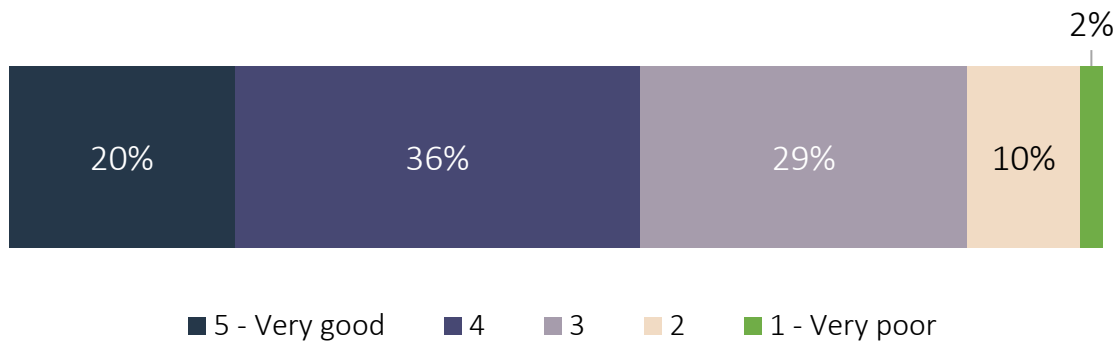
Those who claimed to recall seeing the advertisement on television were more likely to recall elements relating to business assistance and support compared to those that viewed it elsewhere (47% vs. 23%).

Business Outlook

Perceptions of business health

When asked to rate the overall health of their business on a scale of 1 to 5 (where 5 represented very good and 1 was very poor), nearly 3 in 5 respondents (56%) described overall business health as good (scores of 5 or 4). Another 29% provided a neutral score of 3, while fewer (12%) provided a poor rating (scores of 1 or 2).

Figure 7 – Overall business health



Q6. On a scale of 1 to 5, How would you describe the overall health of your business right now? Is it...? Base: All respondents, n=706.

Those that were more likely to rate their overall business health as good (scores of 5 or 4) include:

- As business size increased, campaign ad recall increased, specifically as business size increased from micro (54%), to small (69%), to medium (79%).
- Men compared to women (62% vs. 51%).
- Those aged 55 and older compared to those 35 to 54 (60% vs. 49%).
- Businesses whose challenges include responding to competitors (73%), or employee retention (68%) compared to those facing challenges with marketing (33%), securing financing (38%), increasing profitability (52%) and costs of goods and services (52%).

Challenges facing businesses

Respondents were asked to select the top three biggest challenges facing their business from a comprehensive list, with the three most common challenges including the cost of goods and services (37%), increasing profitability (31%), and marketing or customer base challenges (29%).

Additional top challenges included increasing productivity (14%), hiring and employee retention (13%), adopting digital technologies (12%), and government regulations (12%), among others.

More than 1 in 10 business respondents described experiencing no challenges (11%).

Figure 8 – Biggest challenges for businesses

Business challenges:	Total (n=706)	Micro (n=304)	Small (n=300)	Medium (n=102)
Cost of goods and services	37%	35%	45%	44%
Increasing profitability	31%	30%	33%	27%
Marketing/building customer base	29%	31%	14%	11%
Increasing productivity	14%	14%	15%	28%
Hiring and employee retention	13%	9%	40%	41%
Adopting or keeping up with digital technologies	12%	12%	11%	16%
Government regulations	12%	11%	14%	18%
Supply chain challenges/logistics	11%	9%	20%	23%
Securing financing/loans	10%	10%	13%	12%
Responding to competitors	9%	9%	12%	10%
Applying new technology to operations	9%	8%	13%	17%
Finding partnerships or mentorship	5%	5%	6%	8%
Product development and testing	3%	1%	1%	1%
Economic crisis/inflation*	1%	1%	1%	1%
Taxation/government fees*	1%	1%	1%	1%
Finding enough work*	1%	1%	1%	1%
High interest rates*	1%	1%	-	-
Other	2%	2%	2%	1%
None, we have no challenges	11%	13%	3%	1%
Don't know/prefer not to say	1%	1%	1%	1%

Q7. What are the three biggest challenges currently facing your business? Base: All respondents, n=706.

*Option was not presented to respondents

Different challenges appear to be more prevalent in the following regions:

- Business respondents operating in Quebec were most likely to describe facing issues of increasing productivity (23%) and hiring and employee retention (19%).
- Those in Atlantic Canada were most likely to cite government regulations (25%), applying new technology to operations (17%) and economic crisis (7%).
- Those in Ontario were most likely to report experiencing no challenges (15%).

- Those in Western Canada were most likely to describe encountering supply chain or logistics challenges (14%).

Urban business respondents were more likely to encounter the following issues compared to rural business respondents:

- Marketing / building customer base (33% vs. 20%).
- Adopting or keeping up with digital technologies (16% vs. 5%).

Micro business respondents were more likely to report encountering marketing or customer base challenges (31%) compared to small (14%) and medium (11%) sized business respondents.

Conversely, small and medium sized businesses were more likely to encounter the following challenges compared to micro business respondents:

- Hiring and employee retention (40%, 41% vs. 9%)
- Supply chain / logistics challenges (20%, 23% vs. 9%)
- Applying new technology to operations (13%, 17% vs. 8%)
- Product development and testing (6%, 8% vs. 2%)

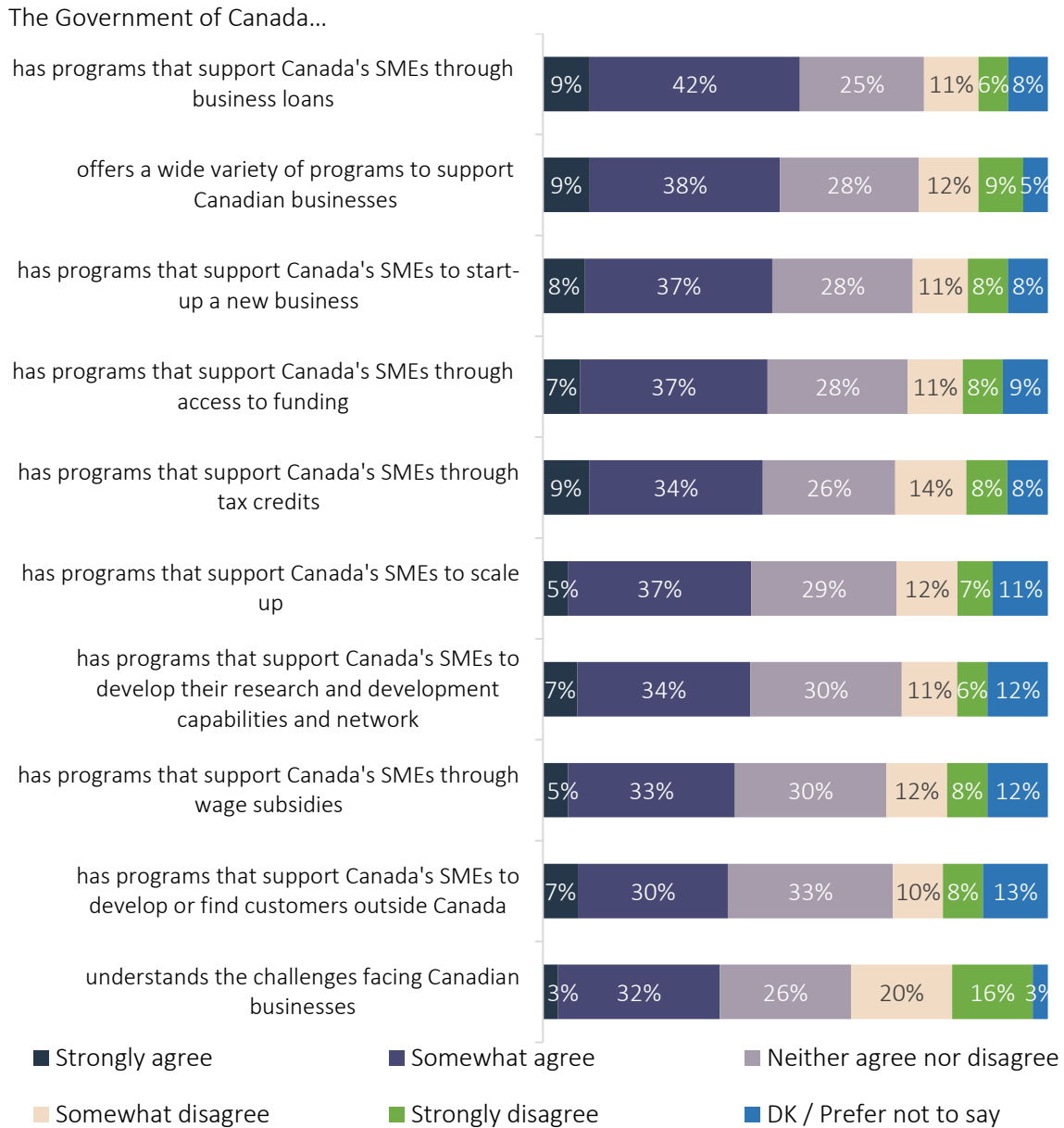
Government of Canada support for SMEs

Awareness of a variety of business supports and programs was measured by asking respondents the extent to which they agree that the Government of Canada has various programs and supports in place on a scale of 1 to 5 (where 5 represented strongly agree and 1 was strongly disagree). Overall, more than a third at least somewhat agreed that the Government of Canada provides the various supports considered in the survey (35%).

More specifically, roughly half of business respondents strongly or somewhat agreed that the Government of Canada has programs that support Canada's SMEs through business loans (51%), offers a wide variety of programs to support businesses (47%), has programs that support SMEs through access to funding (45%), and has programs that support SMEs to start-up a new business (45%).

Agreement was lowest when asked whether the Government of Canada understands the challenges facing Canadian businesses (35% strongly or somewhat agree), has programs supporting customer development outside of Canada (37%), and has programs supporting SMEs through wage subsidies (38%).

Figure 9 – Agreement with government support for SMEs



Q8. To what extent do you agree or disagree with each of the following statements. Base: All respondents, n=706.

Small and medium sized business respondents were more likely to at least somewhat agree with the following compared to micro sized business respondents:

The Government of Canada...

- offers a wide variety of programs to support Canadian businesses (54%, 62% vs. 46%).
- has programs that support businesses through access to funding (54%, 60% vs. 43%).
- has programs that support businesses through tax credits (54%, 59% vs. 42%).
- has programs that support businesses to develop R&D capabilities (51%, 61% vs. 39%).
- has programs that support businesses to scale up (49%, 54% vs. 40%).
- has programs that support businesses through wage subsidies (47%, 55% vs. 36%).
- has programs that support businesses to find customers outside Canada (47%, 53% vs. 35%).

Urban business respondents were more likely to at least somewhat agree with the following compared to rural business respondents:

The Government of Canada...

- offers a wide variety of programs to support Canadian businesses (53% vs. 37%).
- has programs that support businesses through tax credits (46% vs. 32%).
- has programs that support businesses to develop R&D capabilities (44% vs. 31%).

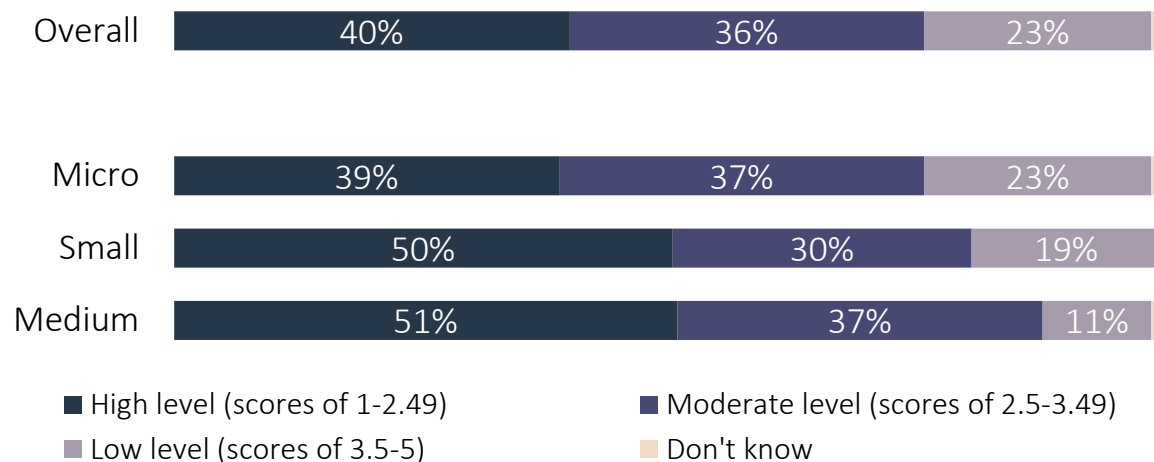
Government Support Index

The Government Support Index (GSI) was developed to produce an overall score based on the agreement scores provided using the following calculation:

$$\text{GSI} = \text{SUM} [\text{business loan programs} + \text{wide variety of programs} + \text{start up} + \text{access to funding} + \text{tax credits} + \text{R\&D capabilities} + \text{scale up} + \text{wage subsidies} + \text{customers outside Canada} + \text{understands business challenges} / \text{\# of valid answers provided (score of 1 to 5)}]$$

Results from this exercise reveal that, on average, 40% of business respondents agree that many or most of the various forms of support are being provided by the Government of Canada. Support is mixed for about 36% of businesses while roughly 23% of businesses would feel that most if not all forms of support are not provided by the Government of Canada, resulting in a moderate average score of 2.8.

Figure 10 – Government Support Index



Q8. To what extent do you agree or disagree with each of the following statements. Base: All respondents, n=706.

The following subgroups were more likely to provide a higher average score:

- Small and medium business respondents compared to micro business respondents (2.6, 2.5 vs. 2.8).
- Businesses operating in urban locations compared to rural locations (2.7 vs. 2.9).
- Those who recalled seeing a campaign ad compared to those that did not (2.4 vs. 2.8).
- Respondents whose business health is good compared to poor (2.6 vs. 3.1).

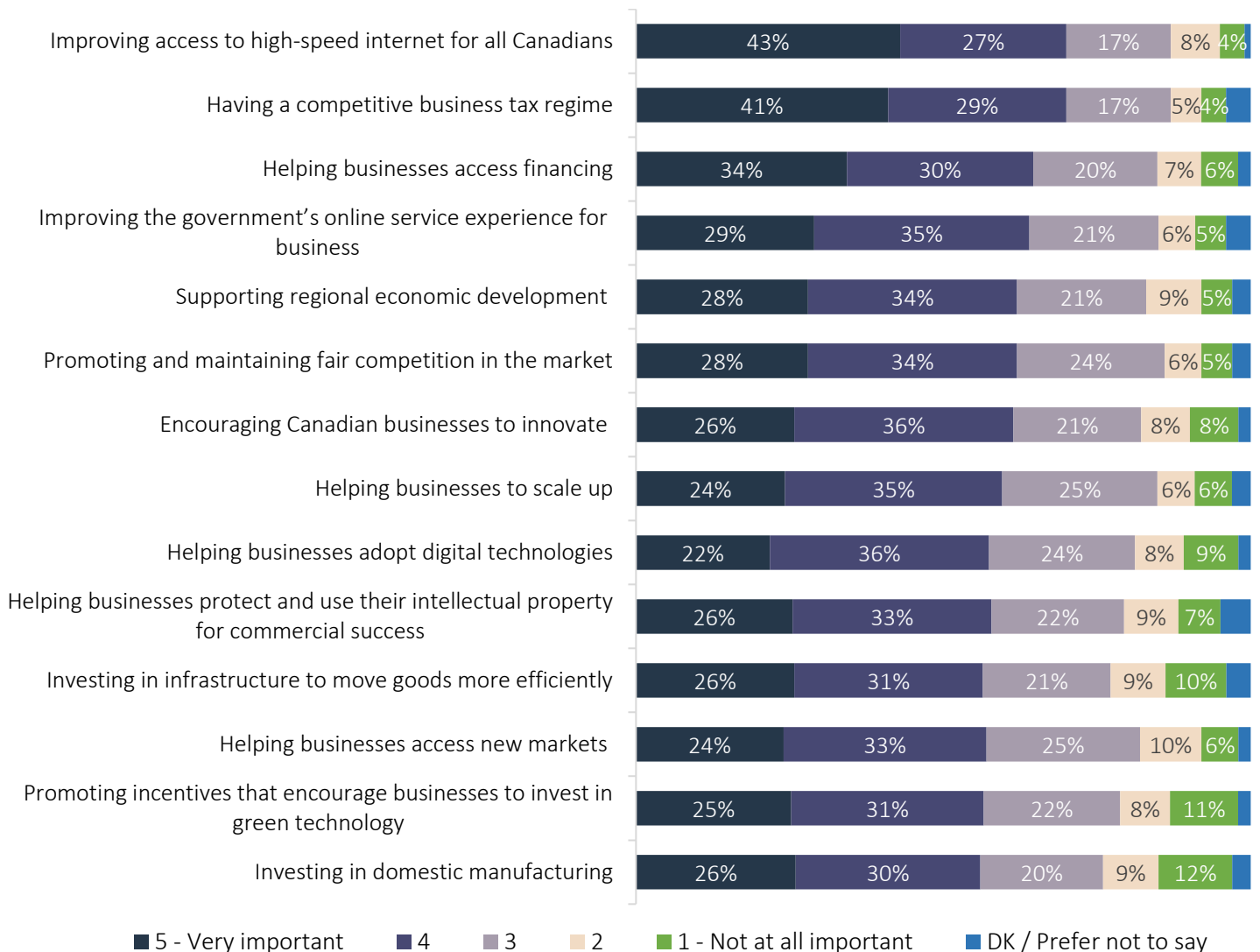
Importance of business priorities

Business respondents were asked to rate the importance (on a scale of 1 to 5, where 5 represented very important and 1 was not at all important) of several Government of Canada support priorities. Overall, more than half of all respondents felt that each business priority was important (scores of 5 or 4).

The forms of support garnering the most positive feedback included having a competitive business tax regime (70%), improving high-speed internet access (70%), providing assistance accessing financing (64%), and improving the government’s online service experience for businesses (64%).

Importance was lowest when it came to investing in domestic manufacturing (56%), encouraging green technology incentives (56%), helping businesses access new markets (57%), and investing in infrastructure (57%).

Figure 11 – Importance of business priorities



Q9. The Government of Canada has identified several priorities to support businesses in Canada. On a scale of 1 to 5, how important are each of the following for your business. Base: All respondents, n=706.

Small and medium sized business respondents were more likely to feel the following priorities were important (score of 5 or 4) compared to micro sized business respondents:

- helping businesses access funding (75%, 79% vs. 63%).
- helping business to scale up (68%, 82% vs. 58%).
- investing in infrastructure to move goods more efficiently (67%, 74% vs. 55%).
- helping businesses protect and use their intellectual property for commercial success (66%, 70% vs. 57%).
- investing in domestic manufacturing (66%, 77% vs. 54%).

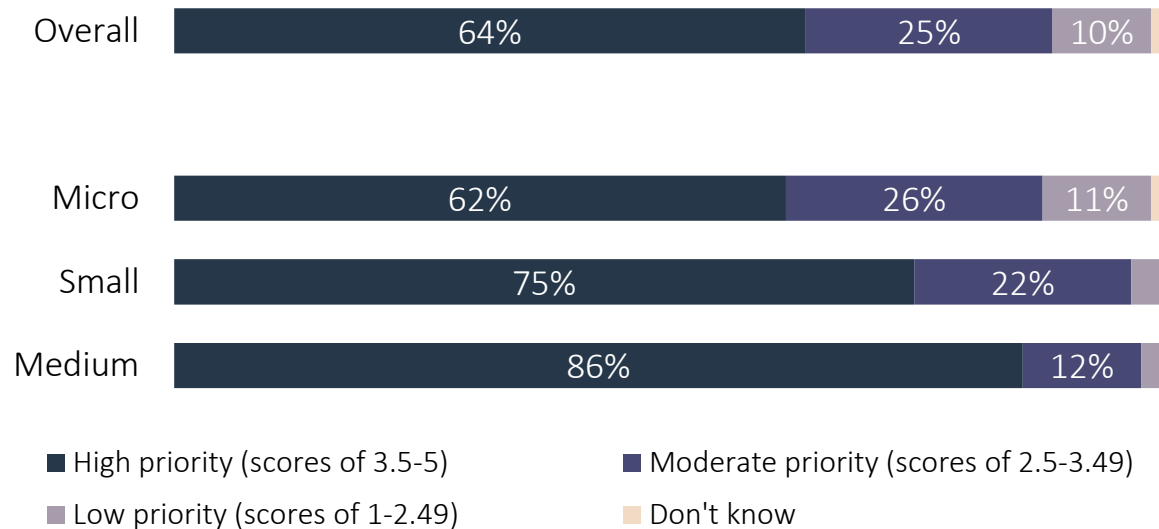
Business Priority Index

The Business Priority Index (BPI) was developed to produce an overall score based on the importance scores provided using the following calculation:

$$\text{BPI} = \text{SUM} [\text{tax regime} + \text{financing} + \text{high-speed internet} + \text{online services} + \text{scale up} + \text{digital technologies} + \text{economic development} + \text{innovation} + \text{fair competition} + \text{infrastructure} + \text{intellectual property} + \text{manufacturing} + \text{new markets} + \text{green technology} / \# \text{ of valid answers (scores of 1 to 5)}]$$

Based on this calculation, we see that nearly two-thirds of businesses, on average, consider the full range of priorities explored in the survey at least important. Results were a bit more mixed for 25% of businesses while a small group, 10%, would generally say that, on average many or most of the priorities proposed were not important. The average score was calculated at 3.7, representing a high priority score.

Figure 12 – Business Priority Index



Q9. The Government of Canada has identified several priorities to support businesses in Canada. On a scale of 1 to 5, how important are each of the following for your business. Base: All respondents, n=706.

As business size increased, average BPI index scores increased, increasing from 3.7 among micro business respondents, to 3.8 among small businesses, and 4.0 among medium businesses.

Those operating in Atlantic Canada (4.0) were more likely to provide a higher average score compared to those operating in Ontario (3.7) and Western Canada (3.7).

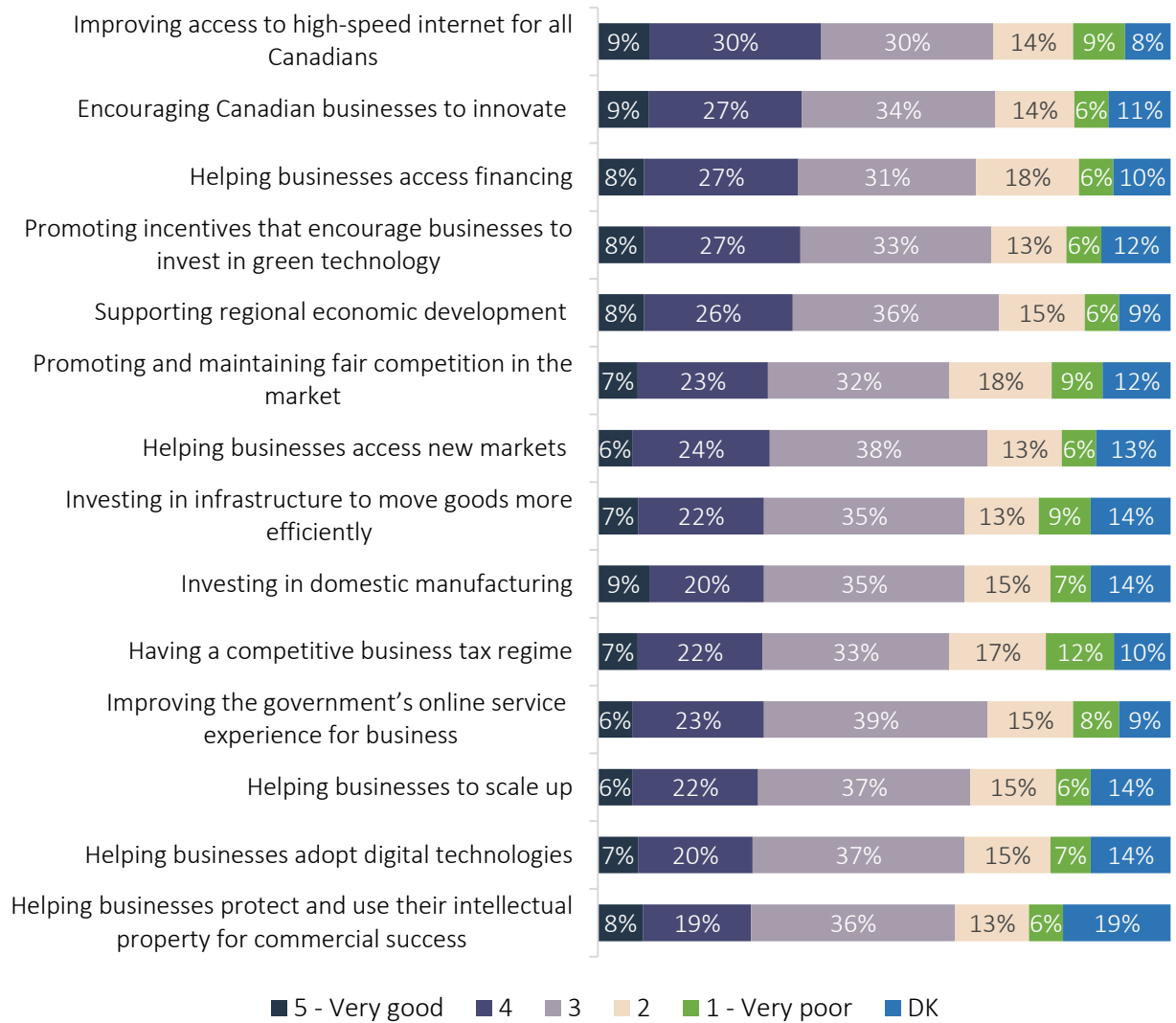
Perceived Government of Canada performance addressing business priorities

Business respondents were asked to rate the Government of Canada’s performance (on a scale of 1 to 5, where 5 represented very good and 1 was very poor) in terms of addressing the same business support priorities considered in the previous section. Overall, at least a quarter of respondents felt that the government was performing well at addressing each of the business priorities considered (scores of 5 or 4).

The Government of Canada was perceived as performing strongest when it comes to improving high-speed internet access (39%), encouraging businesses to innovate (36%), incentivizing green technology investment (35%), and helping businesses access funding (35%).

Performance ratings were lowest (scores of 1 or 2) for having a competitive business tax regime (29%), promoting fair competition (27%), and helping businesses access funding (24%).

Figure 13 – Perceived Government of Canada performance addressing business priorities



Q10. On a scale of 1 to 5, how would you rate the performance of the Government of Canada in each of these same areas. Base: All respondents, n=706.

Small and medium sized business respondents were more likely to provide higher performance ratings (score of 5 or 4) across all business support priorities.

Business respondents operating in Quebec were more likely to provide higher performance ratings for the following support priorities compared to those operating in Western Canada:

- improving the government's online service experience for business (39% vs. 23%).
- helping businesses access new markets (44% vs. 24%).
- investing in domestic manufacturing (38% vs. 25%).

Respondents who recalled seeing a campaign ad were more likely to provide higher performance ratings across all business support priorities.

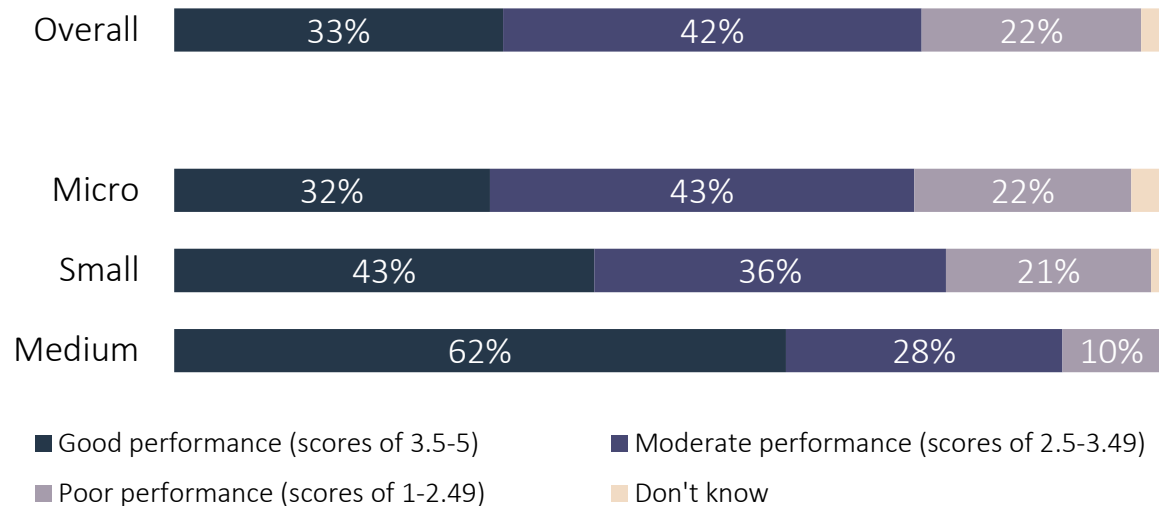
Government Performance Index

The Government Performance Index (GPI) was developed to produce an overall score based on the performance scores provided using the following calculation:

$$\text{GPI} = \frac{\text{SUM} [\text{tax regime} + \text{financing} + \text{high-speed internet} + \text{online services} + \text{scale up} + \text{digital technologies} + \text{economic development} + \text{innovation} + \text{fair competition} + \text{infrastructure} + \text{intellectual property} + \text{manufacturing} + \text{new markets} + \text{green technology}]}{\text{\# of valid answers (scores of 1 to 5)}}$$

Based on this calculation, we see that roughly a third of businesses (33%), on average, felt that the government was performing well across the full range of priorities explored in the survey. Most businesses felt that the government was performing moderately well (42%), while more than a fifth (22%) would say that, on average the government was performing poorly across most business support priorities. The average score was calculated at 3.0, representing a moderate performance score.

Figure 14 – Government Performance Index



Q10. On a scale of 1 to 5, how would you rate the performance of the Government of Canada in each of these same areas. Base: All respondents, n=706.

As business size increased, average GPI index scores increased, increasing from 3.0 among micro business respondents, to 3.2 among small businesses, and 3.5 among medium businesses.

The following additional subsegments were more likely to provide higher average performance scores:

- Those that recalled seeing a campaign ad compared to those that did not (3.5 vs. 2.9).
- Business respondents that described their business health as good compared to those whose business health is poor (3.1 vs. 2.8).

Perceived importance vs. performance

By comparing the perceived importance and performance scores gathered across each business priority, the extent to which large gaps exist can be used to indicate areas of focus for the Government of Canada to support Canadian businesses. At a minimum, importance scores outweighed performance scores by more than 20-points across each business priority.

Potential priority areas of focus include the extent to which businesses have a competitive business tax regime (41%), improving online service experience (34%), and promoting and maintaining fair competition (33%).

The areas in which performance scores are closest to perceived importance include promoting green technology incentives (22%), encouraging Canadian businesses to innovate (26%), helping businesses access new markets (27%) and investing in domestic manufacturing (27%).

Figure 15 – GAP analysis: Perceived importance vs. performance across business priorities

Canadian business priorities	Importance TOP-TWO BOX	Performance TOP-TWO BOX	GAP
Improving access to high-speed internet for all Canadians	70%	38%	32%
Having a competitive business tax regime	70%	29%	41%
Helping businesses access financing	64%	35%	29%
Improving the government’s online service experience for business	64%	30%	34%
Supporting regional economic development	62%	33%	29%
Promoting and maintaining fair competition in the market	62%	29%	33%
Encouraging Canadian businesses to innovate	62%	36%	26%
Helping businesses to scale up	59%	28%	31%
Helping businesses adopt digital technologies	58%	27%	31%
Helping businesses protect and use their intellectual property for commercial success	58%	26%	32%
Investing in infrastructure to move goods more efficiently	57%	29%	28%
Helping businesses access new markets	57%	30%	27%
Promoting incentives that encourage businesses to invest in green technology	57%	35%	22%
Investing in domestic manufacturing	56%	29%	27%

Q9. The Government of Canada has identified several priorities to support businesses in Canada. On a scale of 1 to 5, how important are each of the following for your business. / Q10. On a scale of 1 to 5, how would you rate the performance of the Government of Canada in each of these same areas. Base: All respondents, n=706.

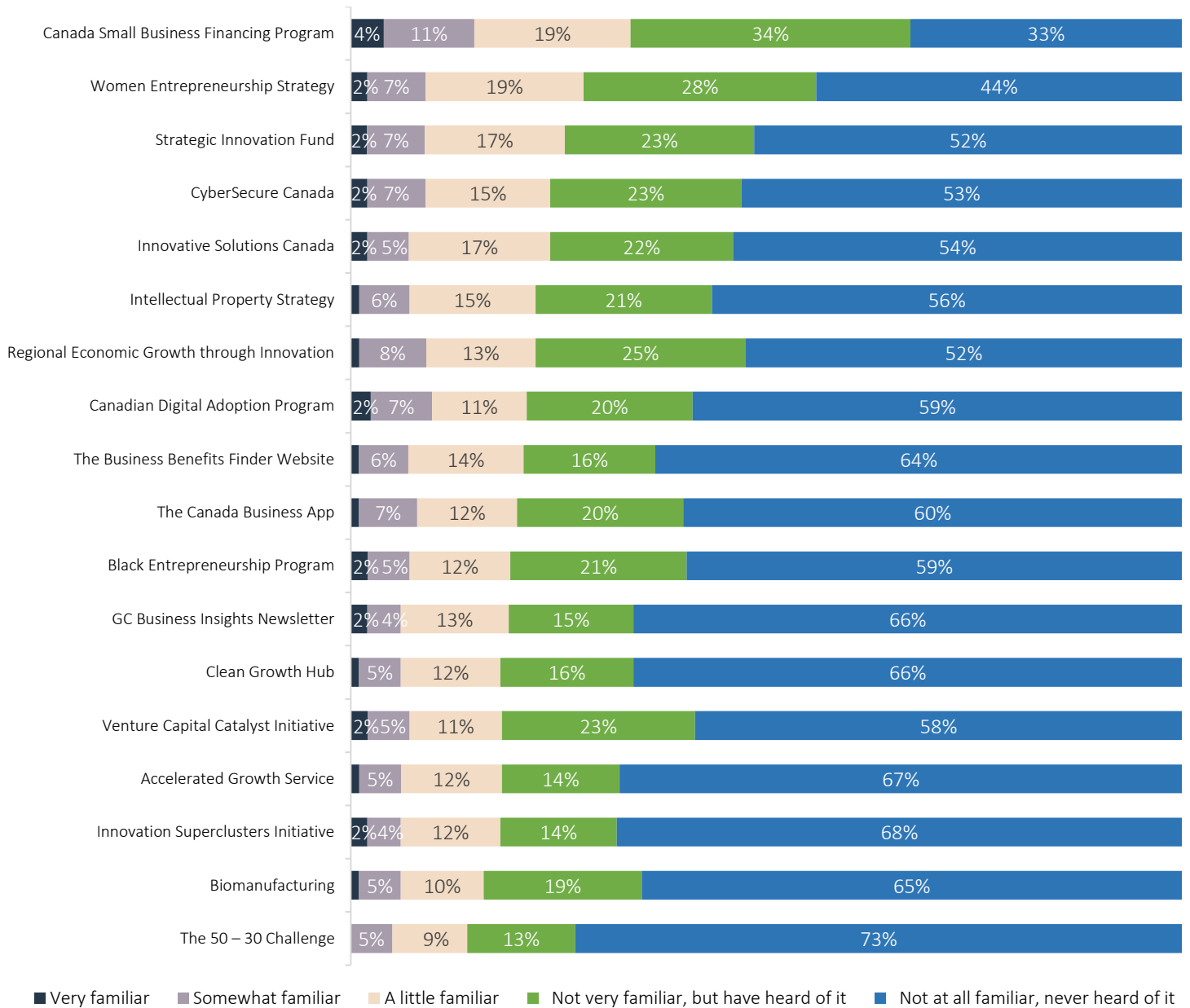
Familiarity with Government of Canada programs

Business respondents were asked to indicate their familiarity with a series of Government of Canada programs designed to help SMEs (using a scale of 1 to 5, where 5 represented very familiar and 1 was not at all familiar).

Familiarity was highest (scores of 3, 4 or 5) for the Canada Small Business Financing Program (34%), followed by the Women Entrepreneurship Strategy (28%), the Strategic Innovation Fund (25%), CyberSecure Canada (24%) and Innovative Solutions Canada (24%).

Familiarity was lowest for the 50-30 Challenges (14%), Biomanufacturing (16%), the Innovation Superclusters Initiative (18%), the Accelerated Growth Service (18%) and the Venture Capital Catalyst Initiative (18%).

Figure 16 – Familiarity with Government of Canada programs supporting SMEs



Q11. How familiar are you with each of the following Government of Canada programs designed to support Canadian businesses. If you have never heard of a particular program, feel free to select “not at all familiar”. Base: All respondents, n=706.

As business size increased, familiarity with Government of Canada programs supporting SMEs increased for all listed programs.

As age decreased, likelihood to report familiarity for all listed Government of Canada programs supporting SMEs increased, with those 18 to 34 scoring higher compared to those 35 to 54 and 55 and older.

Urban businesses were more likely to be at least somewhat familiar with the following programs compared to rural respondents:

- The Canada Business App (12% vs. 3%).
- Women Entrepreneurship Strategy (10% vs. 3%).

When evaluating awareness among equity group respondents, notable observations include:

- Among Black entrepreneurs, 72% were at least a little familiar with the Black Entrepreneurship Program.
- Among women entrepreneurs, 30% were at least a little familiar with the Women Entrepreneurship Program.

Figure 17 – Summary: Those very or somewhat familiar with Government of Canada programs supporting SMEs

Government of Canada Programs:	TOTAL (n=706)	Micro (n=304)	Small (n=300)	Medium (n=102)
Canada Small Business Financing Program	15%	13%	29%	49%
Canadian Digital Adoption Program	10%	8%	21%	32%
Regional Economic Growth through Innovation	9%	7%	22%	37%
Women Entrepreneurship Strategy	9%	7%	21%	35%
CyberSecure Canada	8%	6%	22%	38%
The Canada Business App	8%	6%	23%	32%
Strategic Innovation Fund	8%	7%	20%	34%
Intellectual Property Strategy	8%	6%	18%	33%
Venture Capital Catalyst Initiative	8%	6%	20%	28%
The Business Benefits Finder Website	7%	5%	18%	40%
Innovative Solutions Canada	7%	5%	20%	35%
Black Entrepreneurship Program	7%	5%	16%	37%
Clean Growth Hub	6%	4%	19%	32%
Accelerated Growth Service	6%	4%	18%	31%
GC Business Insights Newsletter	6%	4%	17%	32%
Biomanufacturing	6%	4%	17%	26%
Innovation Superclusters Initiative	6%	4%	18%	24%
The 50 - 30 Challenge	5%	4%	13%	27%

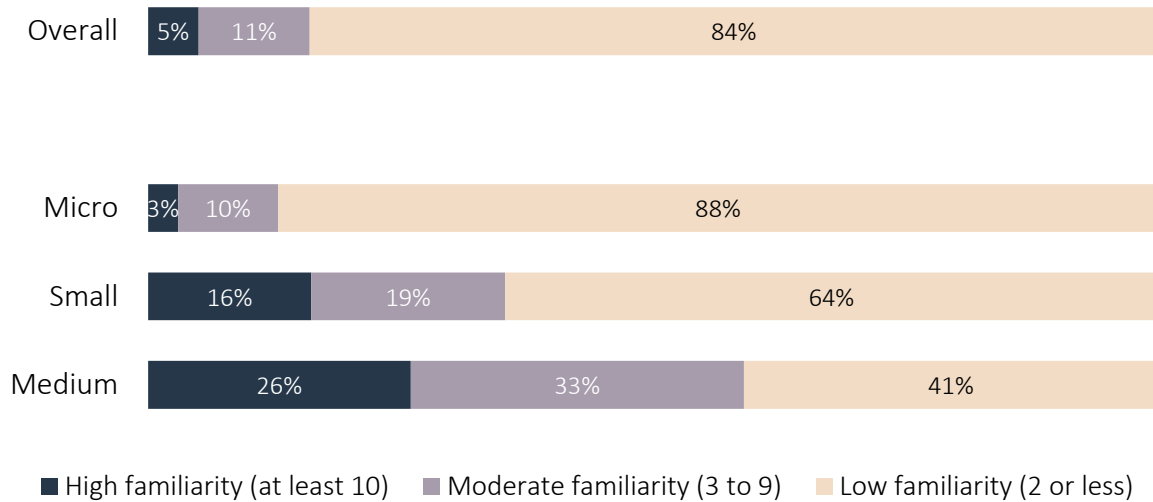
Q11. How familiar are you with each of the following Government of Canada programs designed to support Canadian businesses. If you have never heard of a particular program, feel free to select “not at all familiar”. Base: All respondents, n=706.

Government Program Familiarity Index

The Government Program Familiarity Index was developed to produce an overall score based on the number of programs with which business respondents were at least somewhat familiar. Those that were at least somewhat familiar with at least 10 of the 18 programs were considered highly familiar overall, while those aware of 3 to 9 programs were considered moderately familiar, with low familiarity categorized as 2 or fewer.

Few business respondents (5%) could be considered highly familiar overall, with another 11% considered moderately familiar with government programs. Most business respondents (84%) were aware of 2 or fewer programs supporting SMEs. A total of 18% of business respondents were not aware of a single government program supporting SMEs.

Figure 18 – Government Program Familiarity Index



Q11. How familiar are you with each of the following Government of Canada programs designed to support Canadian businesses. If you have never heard of a particular program, feel free to select “not at all familiar”. Base: All respondents, n=706.

As business size increased, so did overall familiarity with the range of Government of Canada programs supporting SMEs. The proportion considered “highly familiar” increases from 3% among micro business respondents, to 16% among small businesses, and then to 26% among medium businesses.

As age decreased, high familiarity with programs supporting SMEs increased, with those 18 to 34 (21%) scoring higher compared to those 35 to 54 (6%) and 55 and older (2%).

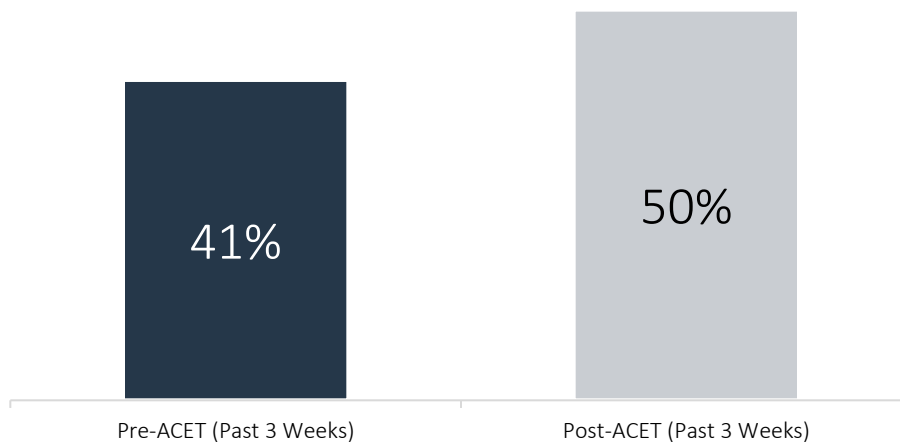
Research findings – post-campaign ACET survey

Unaided ad recall

Recent recall of any ad

Roughly half of business respondents (50%) claimed to recall a Government of Canada advertisement over the past three weeks, an increase compared to results observed in the pre-campaign wave (41%).

Figure 19 – Recent awareness of Government of Canada advertising – general



Q1. Over the past three weeks, have you seen, read or heard any advertising from the Government of Canada? Base: All respondents, Pre-ACET, n=706; Post-ACET, n=705.

The following respondents were more likely to report having seen a Government of Canada advertisement:

- As business size increased, unaided ad recall increased, specifically as business size increased from micro (48%), to small (60%), to medium (76%).
- Micro businesses in the post-campaign wave compared to the pre-campaign wave (48% vs. 40%).

- Small businesses in the post-campaign wave compared to the pre-campaign wave (60% vs. 48%).
- Those 18 to 34 years old (65%) compared to those 35 to 54 (48%) and 55 and older (47%).

Topic recalled

More than 2 in 3 business respondents recalled a specific element of the advertisement (68%), most frequently related to tax programs and benefits (23%), followed by various government programs or services (18%), financial assistance (7%), the economy (5%), or environmental actions (4%). Compared to the pre-campaign wave, the topic of taxes experienced the largest increase (up from 7%), while environmental actions experienced the largest decrease (down from 9%).

Figure 20 – Recall of recent Government of Canada advertising – general

Specific mentions of recalled elements over the past three weeks:	Pre-ACET (n=335)	Post-ACET (n=406)
About the advertisement (Net)	61%	68%
Taxes (Subnet 1)	7%	23%
Carbon Tax Refund /getting rid the carbon tax	2%	12%
It was about taxes (unspecified)	3%	9%
CRA benefits	<1%	4%
Wasting of taxpayer's money	2%	1%
Government programs/public services (Subnet 2)	15%	18%
Health programs (Subnet 2.1)	1%	5%
Dental benefits	1%	4%
Promoting health/Health Canada	<1%	1%
Healthcare benefits	<1%	-
Programs for seniors (Subnet 2.2)	5%	5%
Provide support for disabled person	-	2%
About CPP/Canada pension plan	3%	1%
Programs for seniors/retirement	2%	1%
Variety of programs/benefits/public services	1%	4%
Housing advertisement/promoting affordable housing	2%	2%
Helping mental health issues	1%	2%
It was about social programs/about donation to different organizations	-	1%
Just heard/seen it in newspaper	3%	1%
Services for immigrants	<1%	1%
Decision regarding the GreenBelt	1%	-
Financial assistance (Subnet 3)	5%	7%
Business loan assistance/supporting small businesses	3%	3%
Financial assistance/providing funds for poor	1%	2%
Advertising about budget spending/about fiscal responsibility	-	1%
It was about the new pay rate/workers received some money	1%	-
Economy (Subnet 4)	3%	5%
Economic stimulus/working on inflation/Cost of living	1%	3%
Employment/job creation	2%	2%
About upgrading professional skills	-	1%
Environmental actions (Subnet 5)	9%	4%

Action plan for climate change/climate change incentive	6%	2%
Promoting alternative sources of energy (i.e., solar, etc.)	2%	1%
Going green/save the environment/environmental actions	<1%	1%
Election advertisement/to vote	3%	3%
Negative advertisement about the government/political leaders	2%	2%
It was about the Canadian government/political leaders	7%	1%
About BDC/Business Development Bank of Canada	3%	1%
About CIDC	2%	1%
Canadian armed forced recruitment	-	1%
That little song/jingle (Government of Canada identifier)	-	1%
About COVID (Subnet 6)	5%	1%
Vaccination for anti-virus/Covid shot	4%	1%
Talking about Covid/awareness of flu season	<1%	1%
Drug Free Youth Canada	<1%	1%
About Crime/Public Safety (Subnet 7)	-	1%
About responsible drinking/drunken driving	-	1%
About the crimes going on	-	<1%
Information about the war of Israel/Gaza	3%	1%
Promoting Canada tourism	1%	<1%
About shows/movies (i.e. Emmys, Oscars, etc.)	-	<1%
Warning about disinformation/misinformation	-	<1%
Advertising for French language/advertising for French speaking classes	-	<1%
Citizenship/Legal rights of Canadian citizen	1%	-
Other	6%	3%
Nothing	<1%	-
Don't know/remember	32%	30%

Q2. Think about the most recent Government of Canada advertisement that comes to mind. What do you remember about this ad?
Base: Respondents that had seen, read, or heard any advertising from the Government of Canada, Pre-ACET, n=335; Post-ACET, n=406.

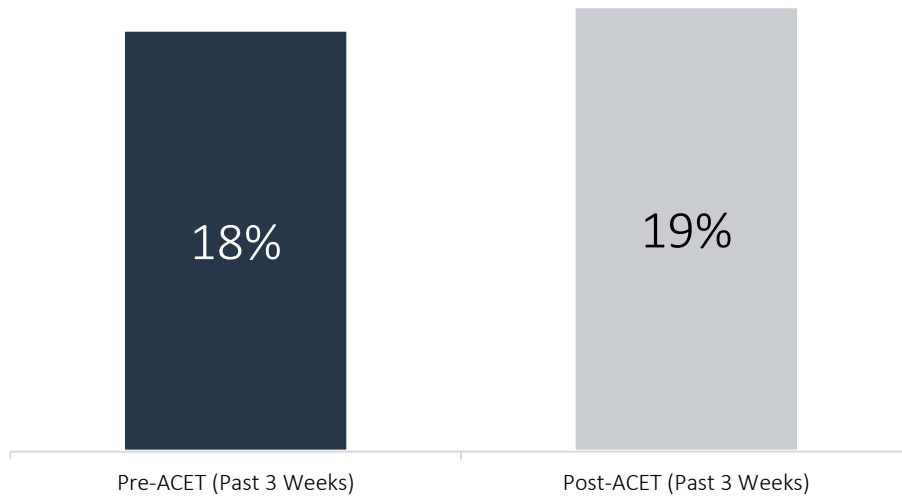
Campaign recall

Recent recall of campaign

Nearly 1 in 5 business respondents (19%) claimed to recall a Government of Canada advertisement over the past three weeks, specifically highlighting easy access to hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs. Results were nearly identical to those observed in the pre-campaign wave (18%).

As business size increased, likelihood to report having seen a specific Government of Canada advertisement increased, specifically as business size increased from micro (16%), to small (36%), to medium (47%).

Figure 21 – Recent awareness of Government of Canada advertising – campaign specific

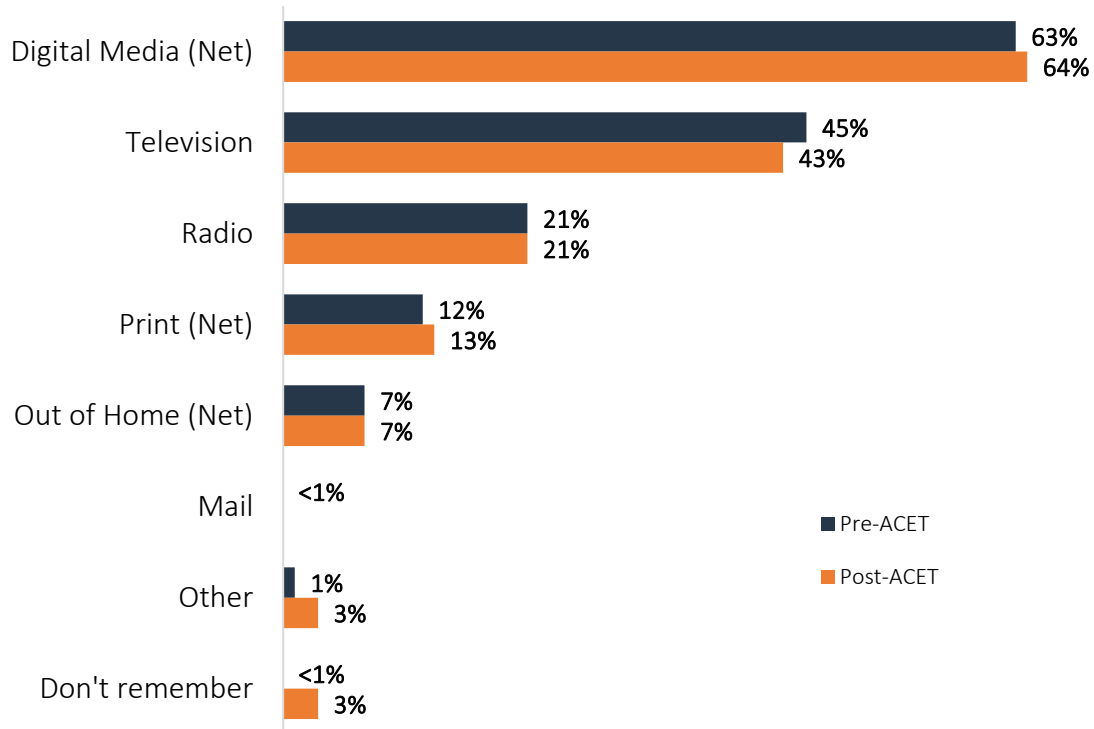


Q3. Over the past three weeks, have you read or heard any Government of Canada advertisements that highlight easy access to hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs?
Base: All respondents, Pre-ACET, n=706; Post-ACET, n=705.

Source of campaign advertising

Nearly 2 in 3 business respondents who claimed to recall an advertisement specified that they engaged with the advertisement via digital media (64%). Many recalled seeing the campaign on television (43%), while fewer cited the radio (21%), or printed materials (13%). Results remained nearly identical to those observed in the pre-campaign wave.

Figure 22 – Summary: Source for Government of Canada advertising – campaign specific



Q4. Where did you see, read or hear this Government of Canada advertisement that highlighted easy access to hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs? Base: Respondents aware of Government of Canada advertising highlighting programs and services for Canadian businesses, Pre-ACET, n=188; Post-ACET, n=206.

Those whose business size was small and medium were more likely to recall seeing the advertisement through the following sources compared to micro business respondents:

- Digital media (84%, 91% vs. 57%).
- Print (34%, 44% vs. 6%).
- Out of home (25%, 18% vs 2%).

A generic website (28%), Google (25%), online newspaper (22%), or YouTube (20%) advertisements were the most cited digital media sources.

Figure 23 – Source of Government of Canada advertising – campaign specific

Advertising sources:	Pre-ACET (n=188)	Post-ACET (n=206)	Micro (n=49)	Small (n=108)	Medium (n=49)
Digital Media (Net)	63%	64%	57%	84%	91%
Website	20%	28%	27%	30%	32%
Google	26%	25%	22%	33%	36%
Online news sites ¹	20%	22%	20%	24%	43%
YouTube	24%	20%	14%	38%	44%
LinkedIn	10%	14%	13%	21%	17%
X (formerly known as Twitter)	9%	11%	8%	20%	21%
TikTok	5%	11%	11%	14%	17%
Web search (e.g., Bing) ²	2%	11%	8%	17%	21%
Digital/Streaming radio (e.g., Spotify, Podcast) ³	4%	9%	6%	18%	26%
Reddit	3%	1%	-	4%	9%
Television	45%	43%	43%	45%	40%
Radio	21%	21%	20%	23%	24%
Print (Net)	12%	13%	6%	34%	44%
Newspapers (Print)	10%	11%	6%	24%	40%
Magazines	5%	5%	2%	16%	13%
Out of Home (Net)	7%	7%	2%	25%	18%
Digital billboards	6%	6%	2%	19%	16%
Highway billboards ⁴	1%	5%	2%	13%	10%
Mail	<1%	-	-	-	-
Other	1%	3%	4%	-	-
Don't remember	<1%	3%	4%	-	-

Q4. Where did you see, read or hear this Government of Canada advertisement that highlighted easy access to hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs? Base: Respondents aware of Government of Canada advertising highlighting programs and services for Canadian businesses, Pre-ACET, n=188; Post-ACET, n=206.

¹ Option previously presented as *Newspaper (online)* in pre-campaign wave.

² Option previously presented as *Bing* in pre-campaign wave.

³ Option previously presented as *Spotify* in pre-campaign wave.

⁴ Option previously presented as *Billboards* in pre-campaign wave.

Small and medium sized business respondents were more likely to recall seeing an advertisement on the following specific digital sources compared to micro business respondents:

- YouTube (38%, 44% vs. 14%).
- X (formerly known as Twitter) (20%, 21% vs. 8%).
- Digital/Streaming radio (e.g., Spotify, Podcast) (18%, 26% vs. 6%).
- Reddit (4%, 9% vs. 0%).

Medium sized business respondents were more likely to recall seeing the campaign advertisement through the following sources compared to small and micro business respondents:

- Online news sites (43% vs. 24%, 20%).
- Newspapers (Print) (40% vs. 24%, 6%).

Campaign topic recalled

Among business respondents who claimed to recall seeing a campaign advertisement over the past three weeks, more than a third described elements of business assistance or support (35%), a nearly identical result compared to the pre-campaign wave (34%).

Additional mentions included various government programs or public services (10%), information related to tax season (6%), or economic growth programs (6%). Awareness of business assistance programs generally increased compared to the pre-campaign wave, most notably recall that the government has different programs that help small and medium businesses (up to 22% from 13%).

Figure 24 – Recall of recent Government of Canada advertising – campaign specific

Specific mentions of recalled elements over the past three weeks:	Pre-ACET (n=188)	Post-ACET (n=206)
About the advertisement (Net)	66%	67%
Business assistance (Subnet 1)	34%	35%
The government has different programs that helps small and medium businesses	13%	22%
The government has programs that support small and medium businesses through grants/incentives for small business	17%	10%
The government has programs that support small and medium businesses through business loans	4%	6%
The government has programs that support businesses to start-up a new business	4%	2%
Government programs/public services (Subnet 2)	6%	10%
The government's efforts to improve the quality of life for its citizens/benefits for the people	1%	4%
It was about dental/health/medical benefits	-	4%
Future access to easier rental properties/low-income housing	4%	2%
It was about the new pay rate/workers received some money	<1%	<1%
It was about pension/disability program	<1%	-
It was talking about taxes/aimed at tax season	-	6%
Economic growth (Subnet 3)	3%	6%
The government has programs that support businesses to generate more employment opportunities	2%	5%
The government helps with the inflation issues/creates better economy	1%	<1%
General negative mention about the ad (i.e. depressing, nonsense, too vague, etc.)	2%	3%
It was for BDC	9%	2%
It was about the Canadian government	4%	2%
Environment protection (Subnet 4)	3%	2%
It was about the environmental fee/carbon tax	2%	2%
It was about environmental protection/installation of solar panels for clean energy	1%	<1%
It was an informative ad	2%	2%
Election (Subnet 5)	2%	2%
It was the leader of a party encouraging the people to vote for them/promoting one party	2%	2%
It was discussing about elections/voting for a better future	<1%	<1%
Business innovation/Business growth (Subnet 6)	3%	1%
The government has programs that support small and medium businesses to grow to the next level	<1%	1%
The government has programs that support businesses adopt digital technologies	2%	<1%
General positive mentions about the ad (i.e. interesting, good ad, good vibes, etc.)	1%	1%
It was on shows/movies (i.e., Emmys, Super Bowl, etc.)	-	1%
It was about criminal/criminal justice	-	<1%
The government is helping other countries/supports Israel	2%	-
It was about Justin Trudeau	2%	-
It was an important ad	<1%	-
Other	5%	3%
None	<1%	-
Don't know/remember	25%	29%

Q5. What do you remember about this ad? Base: Respondents that had seen, read, or heard business program and service advertising from the Government of Canada, Pre-ACET, n=188; Post-ACET, n=206.

Men who claimed to recall seeing the advertisement were more likely to recall that the government has different programs to assist small and medium businesses compared to women (32% vs. 12%).

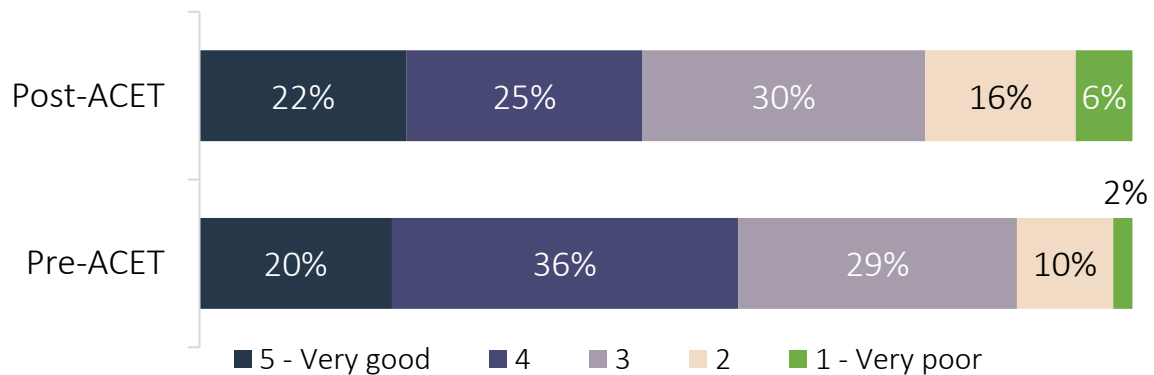
Medium sized businesses who claimed to recall seeing the advertisement were more likely to recall elements related to business innovation or growth programs (9%) compared to micro (0%) and small business respondents (3%).

Business Outlook

Perceptions of business health

When asked to rate the overall health of their business on a scale of 1 to 5 (where 5 represented very good and 1 was very poor), nearly half of respondents (47%) described overall business health as good (scores of 5 or 4). Another 30% provided a neutral score of 3, while more than a fifth (22%) provided a poor rating (scores of 1 or 2). Business respondents in the pre-campaign wave were more likely to describe their overall business health as good compared to the post-campaign wave (56% vs. 47%).

Figure 25 – Overall business health



Q6. On a scale of 1 to 5, How would you describe the overall health of your business right now? Is it...? Base: All respondents, Pre-ACET, n=706; Post-ACET, n=705.

Those that were more likely to rate their overall business health as good (scores of 5 or 4) included:

- As business size increased, overall business health increased, specifically as business size increased from micro (43%), to small (71%), to medium (74%).
- Micro businesses in the pre-campaign wave compared to the post-campaign wave (54% vs. 43%).
- Men compared to women (56% vs. 39%).
- Those aged 55 years older compared to those 35 to 54 (54% vs. 42%).
- Businesses whose challenges include employee retention (68%), government regulations (65%), or applying new technologies to operations (60%) compared to those facing challenges with increasing profitability (37%), responding to competitors (36%), those facing challenges with securing financing (32%), building a customer base (30%), or adopting or keeping up with digital technologies (25%).

Challenges facing businesses

Respondents were asked to select the top three biggest challenges facing their business from a comprehensive list. The three most common challenges were the cost of goods and services (37%), increasing profitability (32%), and marketing or customer base challenges (27%). The top three biggest challenges remained consistent compared to results observed in the pre-ACET wave.

Additional top challenges included high energy costs (16%), debt management (12%), responding to competitors (12%), and hiring and employee retention (11%), among others.

Figure 26 – Biggest challenges for businesses

Business challenges:	Pre-ACET (n=706)	Post-ACET (n=705)	Micro (n=300)	Small (n=302)	Medium (n=103)
Cost of goods and services	37%	37%	37%	39%	37%
Increasing profitability	31%	32%	33%	26%	21%
Marketing/building customer base	29%	27%	29%	13%	12%
High energy costs ⁵	-	16%	16%	20%	15%
Debt management ⁵	-	12%	12%	13%	11%
Responding to competitors	9%	12%	12%	12%	17%
Hiring and employee retention	13%	11%	8%	32%	30%
Increasing productivity	14%	10%	9%	14%	16%
Adopting or keeping up with digital technologies	12%	10%	10%	9%	13%
Securing financing/loans	10%	9%	8%	16%	9%
Complying with government regulations ⁶	12%	9%	9%	9%	7%
Applying new technology to operations	9%	8%	8%	7%	13%
Supply chain challenges/logistics	11%	8%	7%	12%	16%
Cybersecurity ⁵	-	6%	5%	14%	25%
Artificial Intelligence (AI) ⁵	-	6%	5%	10%	15%
Cloud technologies ⁵	-	4%	3%	7%	7%
Finding partnerships or mentorship	5%	2%	2%	5%	4%
Product development and testing	3%	2%	2%	5%	7%
Aging owners/edge of closing business*	-	1%	1%	-	-
Weather issues/climate change*	-	<1%	<1%	-	-
Taxation/government fees*	1%	<1%	<1%	-	-
Economic crisis/inflation*	1%	-	-	-	-
Finding enough work*	1%	-	-	-	-
High interest rates*	1%	-	-	-	-
Other	2%	2%	2%	1%	1%
None, we have no challenges	11%	7%	7%	3%	1%
Don't know/prefer not to say	1%	1%	1%	<1%	-

Q7. What are the three biggest challenges currently facing your business? Base: All respondents, Pre-ACET, n=706; Post-ACET, n=705.

*Option was not presented to respondents

Different challenges appear to be more prevalent in the following regions:

- Business respondents operating in Quebec were most likely to describe facing issues of responding to competitors (21%), securing financing (15%) and cloud technologies (7%).
- Those operating in Ontario were most likely to report issues with cybersecurity (9%).
- Those operating in Western Canada were most likely to cite high energy costs compared to those operating in Quebec (21% vs. 10%).

⁵ Response option introduced in the post-campaign wave.

⁶ Option previously presented as *Government regulations* in pre-campaign wave.

Rural businesses (50%) were more likely to encounter challenges with increasing profitability compared to suburban (34%) and urban businesses (32%).

Urban business respondents (16%) were more likely to encounter issues securing financing compared to suburban (1%) and rural businesses (6%).

Rural (28%) and suburban (18%) businesses were more likely to encounter challenges with high energy costs compared to urban businesses (8%).

Micro business respondents were more likely to cite issues with increasing profitability compared to medium sized businesses (33% vs. 21%).

Micro business respondents were more likely to report encountering marketing or customer base challenges (33%) compared to small (13%) and medium (12%) sized business respondents.

Conversely, small and medium sized businesses were more likely to encounter the following challenges compared to micro business respondents:

- Hiring and employee retention (32%, 30% vs. 8%).
- Supply chain / logistics challenges (12%, 16% vs. 7%).
- Cybersecurity (14%, 25% vs. 5%).
- Artificial Intelligence (10%, 15% vs. 5%).
- Product development and testing (5%, 7% vs. 2%).

Government of Canada support for SMEs

Awareness of a variety of business supports and programs was measured by asking respondents the extent to which they agree that the Government of Canada has various programs and supports in place on a scale of 1 to 5 (where 5 represented strongly agree and 1 was strongly disagree). Overall, more than a quarter at least somewhat agreed that the Government of Canada provides the various supports considered in the survey (28%).

More specifically, more than 2 in 5 business respondents strongly or somewhat agreed that the Government of Canada has programs that support Canada's SMEs through business loans (44%), has programs that support SMEs through tax credits (42%), has programs that support SMEs to start-up a new business (41%), has programs that support SMEs through access to funding (40%), and offers a wide variety of programs to support businesses (40%).

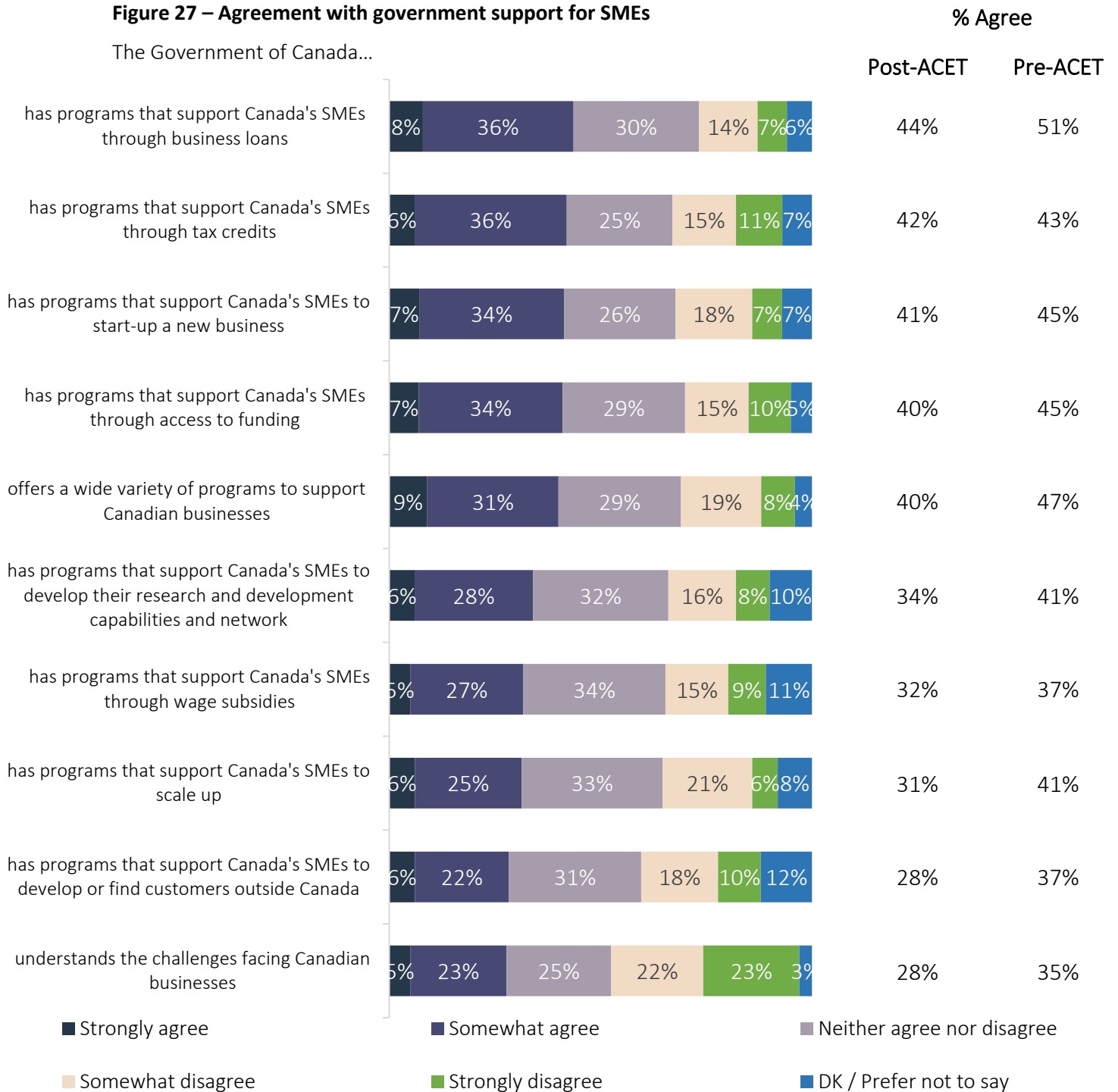
Agreement was lowest when asked whether the Government of Canada understands the challenges facing Canadian businesses (28% strongly or somewhat agree), has programs supporting customer development outside of Canada (28%), has programs supporting SMEs to scale up (31%), and has programs supporting SMEs through wage subsidies (32%).

Businesses in the pre-campaign wave were more likely to at least somewhat agree with the following compared to post-campaign respondents:

The Government of Canada...

- has programs that support businesses to develop R&D capabilities (41% vs. 34%).
- has programs that support businesses to scale up (41% vs. 31%).
- has programs that support businesses to find customers outside Canada (37% vs. 28%).
- understands the challenges facing Canadian businesses (35% vs. 28%).

Figure 27 – Agreement with government support for SMEs



Q8. To what extent do you agree or disagree with each of the following statements. Base: All respondents, Pre-ACET, n=706; Post-ACET, n=705.

Small and medium sized business respondents were more likely to at least somewhat agree with each government support or program compared to micro sized business respondents.

Micro business respondents in the pre-campaign wave were more likely to at least somewhat agree with the following compared to the post-campaign wave:

The Government of Canada...

- has programs that support businesses through business loans (49% vs. 41%).
- offers a wide variety of programs to support Canadian businesses (46% vs. 37%).
- has programs that support businesses to develop R&D capabilities (39% vs. 31%).
- has programs that support businesses to scale up (40% vs. 28%).
- has programs that support businesses to find customers outside Canada (35% vs. 25%).
- understands the challenges facing Canadian businesses (34% vs. 25%).

Urban business respondents were more likely to at least somewhat agree with the following compared to rural business respondents:

The Government of Canada...

- has programs that support businesses through business loans (51% vs. 37%).
- has programs that support businesses through tax credits (47% vs. 29%).
- has programs that support businesses to find customers outside Canada (35% vs. 18%).

Businesses operating in Quebec were more likely to at least somewhat agree with the following compared to those operating in Western Canada:

The Government of Canada...

- has programs that support businesses to develop R&D capabilities (44% vs. 28%).
- has programs that support businesses to scale up (42% vs. 28%).
- has programs that support businesses to find customers outside Canada (45% vs. 25%).

Those who recalled seeing a campaign advertisement were more likely to at least somewhat agree the government has each program and support in place.

Government Support Index

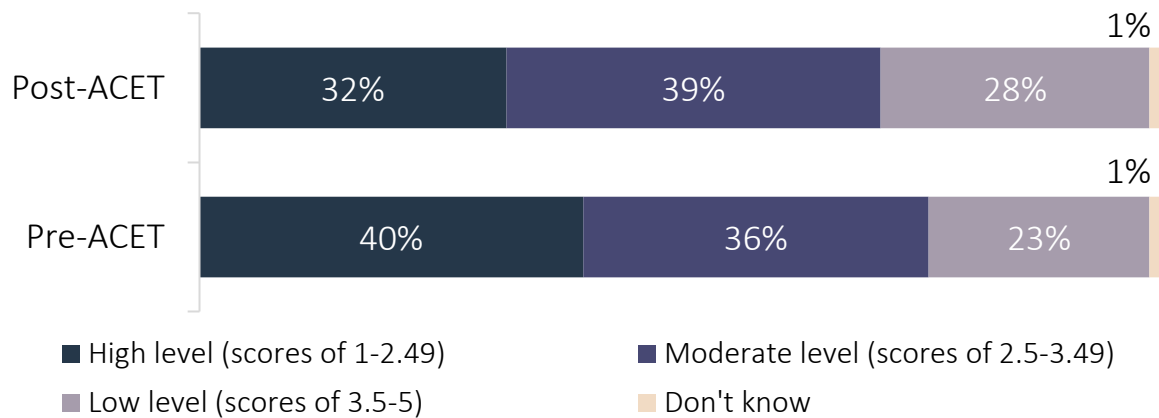
The Government Support Index (GSI) was developed to produce an overall score based on the agreement scores provided using the following calculation:

$$\text{GSI} = \frac{\text{SUM} [\text{business loan programs} + \text{wide variety of programs} + \text{start up} + \text{access to funding} + \text{tax credits} + \text{R\&D capabilities} + \text{scale up} + \text{wage subsidies} + \text{customers outside Canada} + \text{understands business challenges}]}{\text{\# of valid answers provided (score of 1 to 5)}}$$

Results from this exercise reveal that, on average, 32% of business respondents agree that many or most of the various forms of support are being provided by the Government of Canada. Support is mixed for about 39% of businesses while roughly 28% of businesses would feel that most if not all forms of support are not provided by the Government of Canada, resulting in a moderate average score of 2.9.

Pre-campaign respondents were more likely to agree that many or most forms of support are being provided by the Government of Canada compared to post-campaign respondents (40% vs. 32%). This resulted in a decrease in the overall average score of 2.8 to 2.9.

Figure 28 – Government Support Index



Q8. To what extent do you agree or disagree with each of the following statements. Base: All respondents, Pre-ACET, n=706; Post-ACET, n=705.

The following subgroups were more likely to have higher average scores:

- Small (2.5) and medium (2.3) business respondents compared to micro business respondents (3.0).
- Micro businesses in the pre-campaign wave compared to the post-campaign wave (2.8 vs. 3.0).
- Small businesses in the post-campaign wave compared to the pre-campaign wave (2.5 vs. 2.6).
- Businesses operating in Atlantic Canada (2.6) or Quebec (2.7) compared to Ontario (3.0) or Western Canada (3.1).
- Businesses operating in urban locations compared to rural locations (2.8 vs. 3.1).
- Those who recalled seeing a campaign ad compared to those who did not (2.6 vs. 3.0).
- Respondents whose business health is good compared to poor (2.6 vs. 3.4).

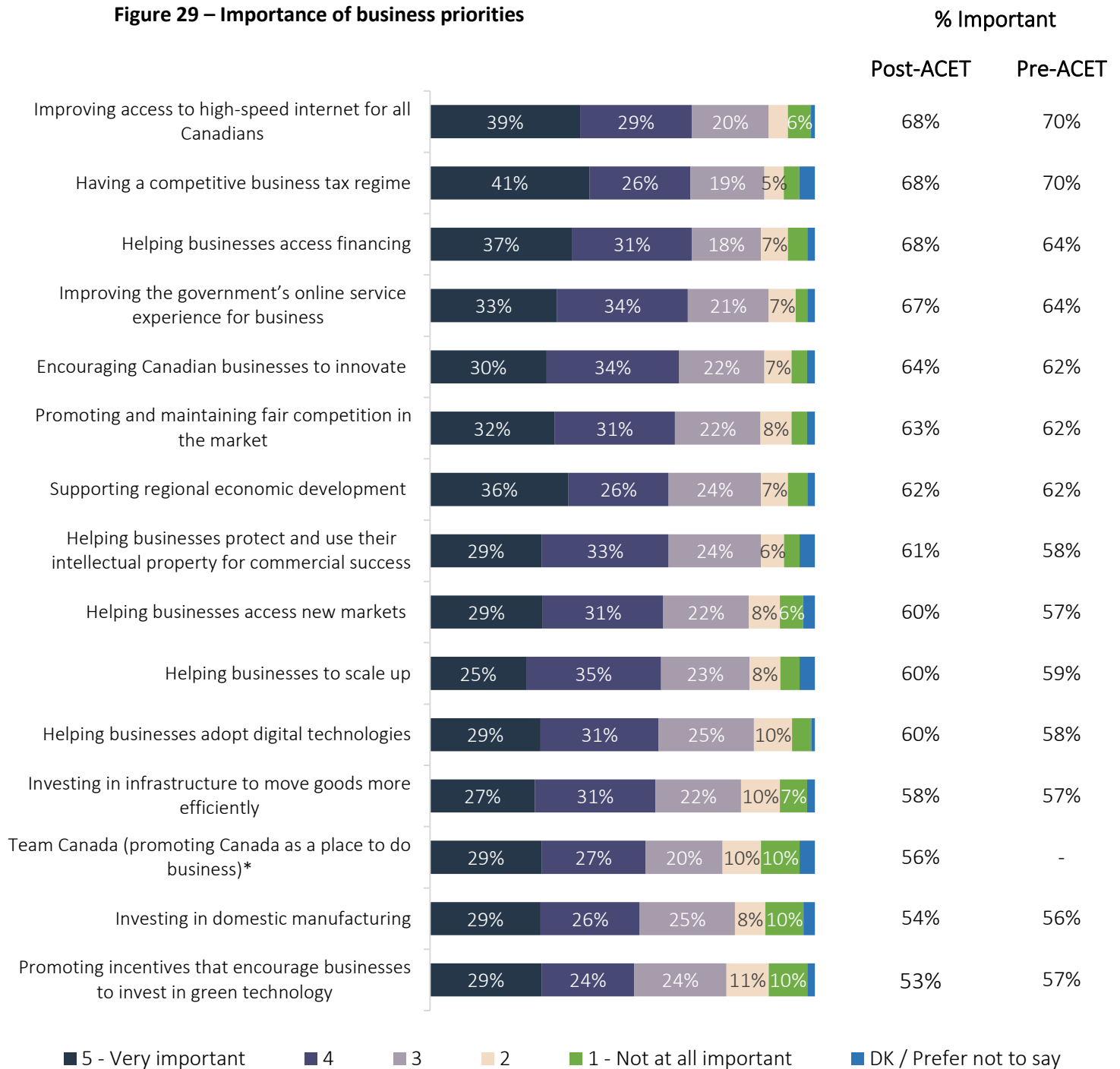
Importance of business priorities

Business respondents were asked to rate the importance (on a scale of 1 to 5, where 5 represented very important and 1 was not at all important) of several Government of Canada support priorities. Overall, more than half of all respondents felt that each business priority was important (scores of 5 or 4), consistent with results observed in the pre-campaign wave.

The forms of support garnering the most support included improving high-speed internet access (68%), having a competitive business tax regime (68%), providing assistance accessing financing (68%), and improving the government's online service experience for businesses (67%).

Importance was lowest when it came to encouraging green technology incentives (53%), investing in domestic manufacturing (54%), promoting Canada as a place to do business (56%), and investing in infrastructure (58%).

Figure 29 – Importance of business priorities



Q9. The Government of Canada has identified several priorities to support businesses in Canada. On a scale of 1 to 5, how important are each of the following for your business. Base: All respondents, Pre-ACET, n=706; Post-ACET, n=705. *Statement introduced in the post-campaign wave.

Small and medium sized business respondents were more likely to feel the following priorities were important (score of 5 or 4) compared to micro sized business respondents:

- helping businesses access funding (79%, 80% vs. 66%).
- encouraging Canadian businesses to innovate (73%, 76% vs. 63%).
- promoting and maintaining fair competition in the market (75%, 74% vs. 62%).
- supporting regional economic development (73%, 74% vs. 61%).
- helping businesses access new markets (70%, 70% vs. 59%).
- helping business to scale up (72%, 74% vs. 58%).
- helping businesses adopt digital technologies (68%, 80% vs. 59%).
- investing in infrastructure to move goods more efficiently (71%, 70% vs. 56%).
- investing in domestic manufacturing (70%, 79% vs. 52%).
- Promoting incentives that encourage green technology investment (66%, 76% vs. 51%).

Small businesses in the post-campaign wave were more likely to feel the following priorities were important compared to the pre-campaign wave:

- promoting and maintaining fair competition in the market (75% vs. 66%).
- helping businesses access new markets (70% vs. 63%).

Respondents whose business is based in an urban location were more likely to feel the following priorities were important compared to those in rural locations:

- helping businesses adopt digital technologies (65% vs. 47%).
- investing in domestic manufacturing (60% vs. 45%).
- promoting incentives that encourage green technology investment (59% vs. 43%).

Businesses operating in Ontario were more likely to feel the following priorities were important compared to those operating in Western Canada:

- encouraging Canadian businesses to innovate (72% vs. 55%).
- helping businesses protect and use their intellectual property for commercial success (72% vs. 53%).
- helping businesses to scale up (69% vs. 48%).
- helping businesses access new markets (65% vs. 52%).
- helping businesses adopt digital technologies (67% vs. 51%).
- promoting incentives that encourage green technology investment (63% vs. 40%).

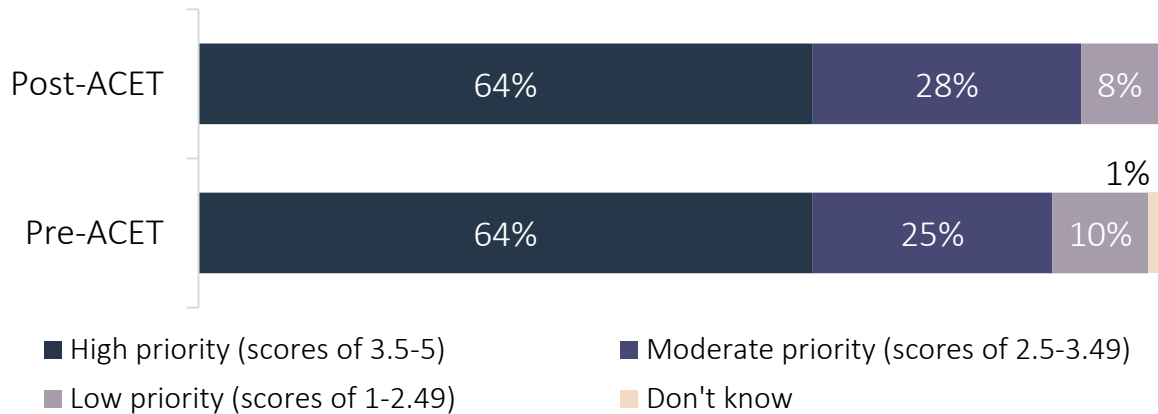
Business Priority Index

The Business Priority Index (BPI) was developed to produce an overall score based on the importance scores provided using the following calculation:

$$\text{BPI} = \frac{\text{SUM [tax regime + financing + high-speed internet + online services + scale up + digital technologies + economic development + innovation + fair competition + infrastructure + intellectual property + manufacturing + new markets + green technology + Team Canada]}}{\text{\# of valid answers (scores of 1 to 5)}}$$

Based on this calculation, we see that nearly two-thirds of businesses, on average, consider the full range of priorities explored in the survey at least important, identical to results observed in the pre-campaign wave. Results were a bit more mixed for 28% of businesses while a small group, 8%, would generally say that, on average many or most of the priorities proposed were not important. The average score was calculated at 3.8, representing a high priority score.

Figure 30 – Business Priority Index



Q9. The Government of Canada has identified several priorities to support businesses in Canada. On a scale of 1 to 5, how important are each of the following for your business. Base: All respondents, Pre-ACET, n=706; Post-ACET, n=705.

Small businesses in the post-campaign wave were more likely to provide higher BPI index scores compared to the pre-campaign wave (4.0 vs. 3.8).

As business size increased, average BPI index scores increased from 3.7 among micro business respondents, to 4.0 among small businesses, and 4.0 among medium businesses.

Those operating in Ontario (3.9) were more likely to provide a higher average score compared to those operating in Western Canada (3.6).

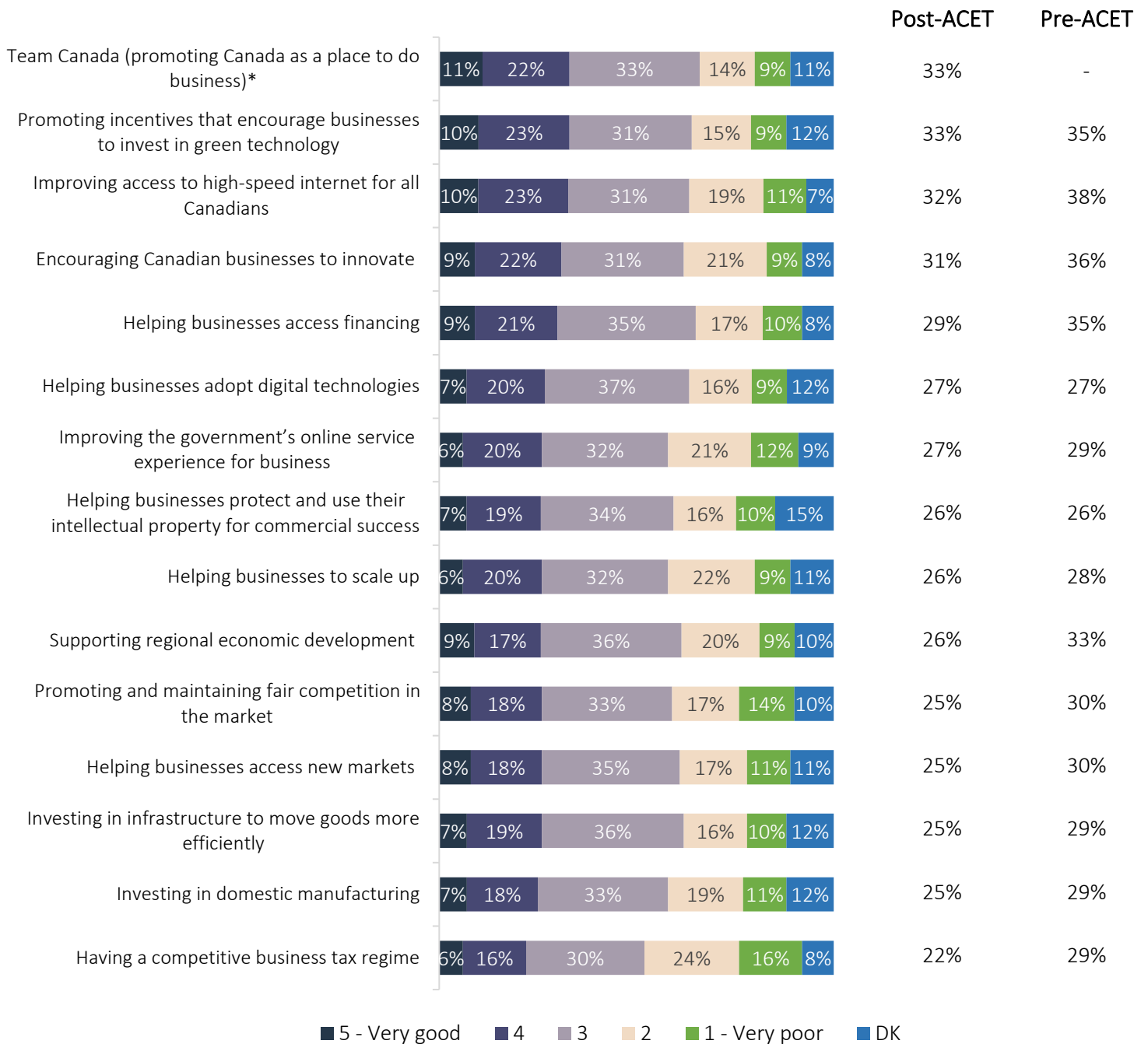
Perceived Government of Canada performance addressing business priorities

Business respondents were asked to rate the Government of Canada’s performance (on a scale of 1 to 5, where 5 represented very good and 1 was very poor) in terms of addressing the same business support priorities considered in the previous section. Overall, at least a fifth of respondents (22%) felt that the government was performing well at addressing each of the business priorities considered (scores of 5 or 4).

The Government of Canada was perceived as performing strongest when it comes to promoting Canada as a place to do business (33%), incentivizing green technology investment (33%), improving high-speed internet access (32%) and encouraging businesses to innovate (31%).

Performance ratings were lowest (scores of 1 or 2) for having a competitive business tax regime (40%), improving the government’s online service experience (33%), promoting fair competition (31%) and investing in domestic manufacturing (31%).

Figure 31 – Perceived Government of Canada performance addressing business priorities % Good



Q10. On a scale of 1 to 5, how would you rate the performance of the Government of Canada in each of these same areas. Base: All respondents, Pre-ACET, n=706; Post-ACET, n=705. *Statement introduced in the post-campaign wave.

Business respondents in the pre-campaign wave were more likely to provide higher performance ratings for the following support priorities compared to post-campaign respondents:

- supporting regional economic development (33% vs. 26%).
- having a competitive business tax regime (29% vs. 22%).

Micro businesses in the pre-campaign wave were more likely to provide higher performance ratings for the following compared to the post-campaign wave:

- improving access to high-speed internet (37% vs. 30%).
- helping businesses access financing (34% vs. 26%).
- supporting regional economic development (32% vs. 22%).
- helping businesses access new markets (29% vs. 21%).
- having a competitive business tax regime (27% vs. 18%).

Small businesses in the post-campaign wave were more likely to provide higher performance ratings for the following support priorities compared to the pre-campaign wave:

- promoting incentives that encourage green technology investment (53% vs. 42%).
- helping businesses access financing (53% vs. 44%).
- helping businesses access new markets (53% vs. 38%).
- helping businesses protect and use their intellectual property (52% vs. 38%).
- improving the government's online service experience for businesses (51% vs. 39%).
- supporting regional economic development (50% vs. 40%).
- investing in infrastructure to move goods more efficiently (49% vs. 40%).
- promoting and maintaining fair competition in the market (48% vs. 38%).
- having a competitive business tax regime (48% vs. 36%).
- helping businesses to scale up (47% vs. 39%).

- Investing in domestic manufacturing (47% vs. 39%).

Small and medium sized business respondents were more likely to provide higher performance ratings (score of 5 or 4) across all business support priorities.

Business respondents operating in Quebec were more likely to provide higher performance ratings for each presented area compared to those operating in Western Canada, apart from promoting Canada as a place to do business.

Business respondents operating in Quebec were more likely to provide higher performance ratings for the following support priorities compared to those operating in Ontario:

- helping businesses access financing (45% vs. 28%).
- improving the government's online service experience for businesses (40% vs. 23%).
- promoting and maintaining fair competition in the market (41% vs. 26%).
- helping businesses access new markets (39% vs. 25%).
- having a competitive business tax regime (35% vs. 21%).

Respondents who recalled seeing a campaign ad were more likely to provide higher performance ratings across all business support priorities.

Respondents whose business is based in an urban location were more likely to provide higher performance ratings for the following support priorities compared to those in a rural location:

- encouraging Canadian businesses to innovate (36% vs. 23%).
- helping businesses adopt digital technologies (32% vs. 18%).
- improving the government's online service experience for business (34% vs. 15%).
- helping businesses protect and use their intellectual property (32% vs. 16%).
- investing in infrastructure to move goods more efficiently (32% vs. 18%).
- having a competitive business tax regime (28% vs. 13%).

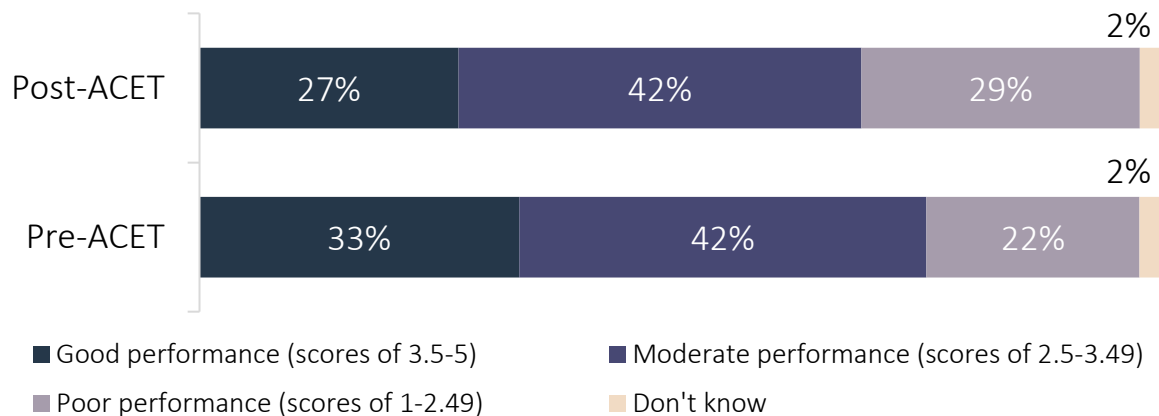
Government Performance Index

The Government Performance Index (GPI) was developed to produce an overall score based on the performance scores provided using the following calculation:

$$\text{GPI} = \frac{\text{SUM [tax regime + financing + high-speed internet + online services + scale up + digital technologies + economic development + innovation + fair competition + infrastructure + intellectual property + manufacturing + new markets + green technology + Team Canada]}}{\text{\# of valid answers (scores of 1 to 5)}}$$

Based on this calculation, we see that more than a quarter of businesses (27%), on average, felt that the government was performing well across the full range of priorities explored in the survey, decreasing compared to the pre-campaign wave (33%). Most businesses felt that the government was performing moderately well (42%), while more than a quarter (29%) would say that, on average the government was performing poorly across most business support priorities. The average score was calculated at 2.9, representing a moderate performance score.

Figure 32 – Government Performance Index



Q10. On a scale of 1 to 5, how would you rate the performance of the Government of Canada in each of these same areas. Base: All respondents, Pre-ACET, n=706; Post-ACET, n=705.

As business size increased, average GPI index scores increased, increasing from 2.8 among micro business respondents, to 3.5 among small businesses, and 3.7 among medium businesses.

Micro businesses in the pre-campaign wave were more likely to provide higher average performance scores compared to those in the post-campaign wave (3.0 vs. 2.8).

Small businesses in the post-campaign wave were more likely to provide higher average performance scores compared to those in the pre-campaign wave (3.5 vs. 3.2).

The following additional subsegments were more likely to provide higher average priority scores:

- Those who recalled seeing a campaign ad compared to those who did not (3.2 vs. 2.8).
- Business respondents that described their business health as good compared to those whose business health is poor (3.1 vs. 2.6).

Perceived importance vs. performance

By comparing the perceived importance and performance scores gathered across each business priority, the extent to which large gaps exist can be used to indicate areas of focus for the Government of Canada to support Canadian businesses. At a minimum, importance scores outweighed performance scores by more than 20-points across each business priority.

Potential priority areas included the extent to which businesses have a competitive business tax regime (46% GAP), improving online service experience (40%), helping businesses access financing (39%), and promoting and maintaining fair competition (38%).

The areas in which performance scores are closest to perceived importance include promoting green technology incentives (20%), promoting Canada as a place to do business (23%), and investing in domestic manufacturing (29%).

The gaps in perceived importance and performance that experienced the largest increase compared to pre-campaign results were found for the following priorities:

- helping businesses accessing financing (39%, up from 29%).
- helping businesses access new markets (35%, up from 27%).
- supporting regional economic development (36%, up from 29%).
- encouraging Canadian businesses to innovate (33%, up from 26%).

Figure 33 – GAP analysis: Perceived importance vs. performance across business priorities

Canadian business priorities	Importance TOP-TWO BOX	Performance TOP-TWO BOX	Post-ACET GAP	Pre-ACET GAP
Improving access to high-speed internet for all Canadians	68%	32%	36%	32%
Having a competitive business tax regime	68%	22%	46%	41%
Helping businesses access financing	68%	29%	39%	29%
Improving the government’s online service experience for business	67%	27%	40%	34%
Encouraging Canadian businesses to innovate	64%	31%	33%	26%
Promoting and maintaining fair competition in the market	63%	25%	38%	33%
Supporting regional economic development	62%	26%	36%	29%
Helping businesses protect and use their intellectual property for commercial success	61%	26%	35%	32%
Helping businesses access new markets	60%	25%	35%	27%
Helping businesses to scale up	60%	26%	34%	31%
Helping businesses adopt digital technologies	60%	27%	33%	31%
Investing in infrastructure to move goods more efficiently	58%	25%	33%	28%
Team Canada (promoting Canada as a place to do business)*	56%	33%	23%	-
Investing in domestic manufacturing	54%	25%	29%	27%
Promoting incentives that encourage businesses to invest in green technology	53%	33%	20%	22%

Q9. The Government of Canada has identified several priorities to support businesses in Canada. On a scale of 1 to 5, how important are each of the following for your business. / Q10. On a scale of 1 to 5, how would you rate the performance of the Government of Canada in each of these same areas. Base: All respondents, Pre-ACET, n=706; Post-ACET, n=705. *Statement introduced in the post-campaign wave.

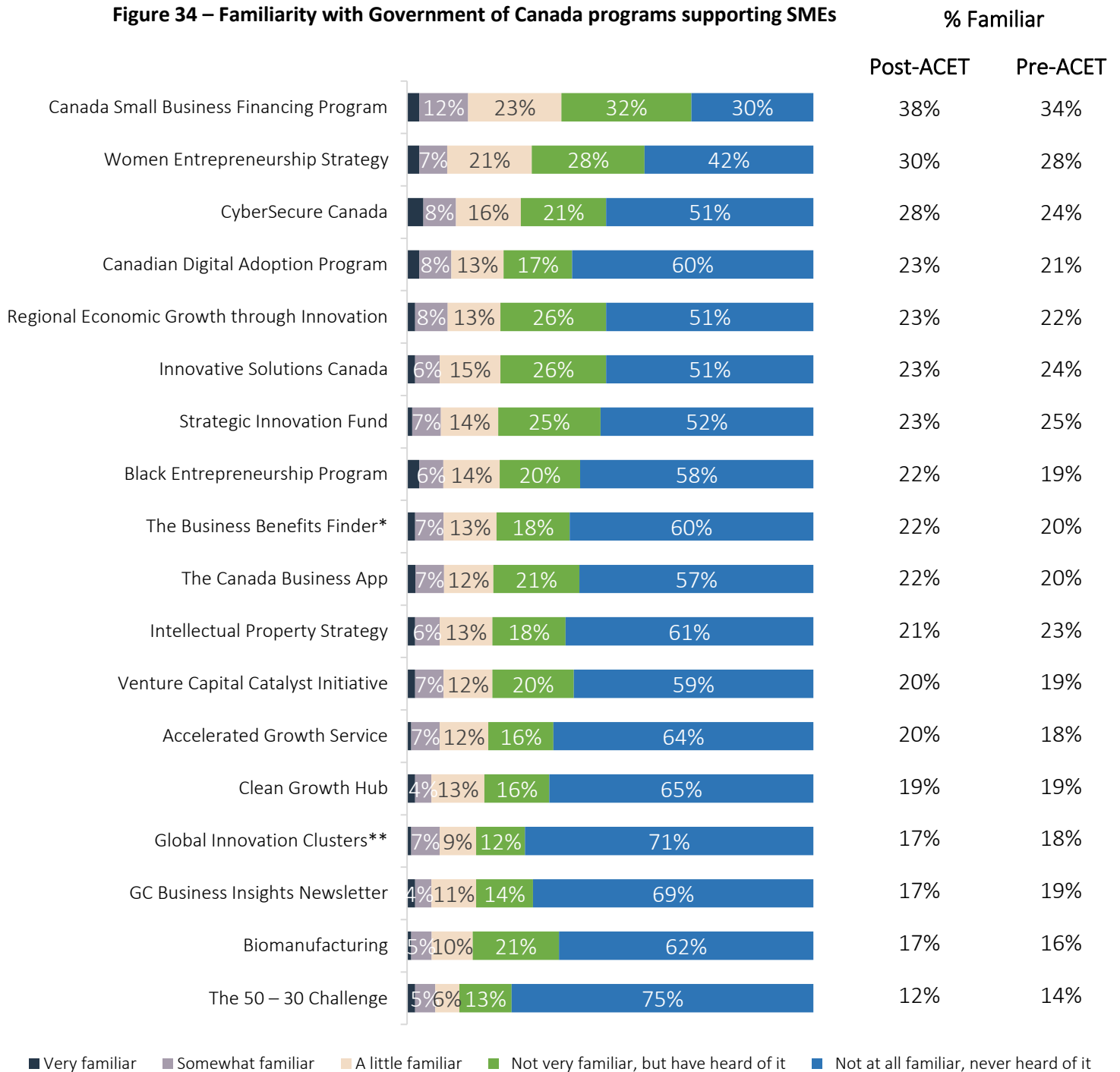
Familiarity with Government of Canada programs

Business respondents were asked to indicate their familiarity with a series of Government of Canada programs designed to help SMEs (using a scale of 1 to 5, where 5 represented very familiar and 1 was not at all familiar).

Familiarity was highest (scores of 3, 4 or 5) for the Canada Small Business Financing Program (38%), followed by the Women Entrepreneurship Strategy (30%), and CyberSecure Canada (28%).

Familiarity was lowest for the 50-30 Challenge (12%), Biomanufacturing (17%), the GC Business Insights Newsletter (17%), and the Global Innovation Clusters (17%).

Figure 34 – Familiarity with Government of Canada programs supporting SMEs



Q11. How familiar are you with each of the following Government of Canada programs designed to support Canadian businesses. If you have never heard of a particular program, feel free to select “not at all familiar”. Base: All respondents, Pre-ACET, n=706, Post-ACET, n=705. *Option previously presented as The Business Benefits Finder Website in pre-campaign wave. **Previously presented as Innovation Superclusters Initiative in the pre-campaign wave.

Small businesses in the post-campaign wave were more likely to be at least somewhat familiar with the following programs supporting SMEs compared to those in the pre-campaign wave:

- Innovation Solutions Canada (33% vs. 20%).
- The Business Benefits Finder (32% vs. 18%).
- Regional Economic Growth through Innovation (31% vs. 22%).
- CyberSecure Canada (30% vs. 22%).
- Canada Digital Adoption Program (29% vs. 21%).
- Accelerated Growth Service (28% vs. 18%).
- Strategic Innovation Fund (28% vs. 20%).
- Global Innovation Clusters (26% vs. 18%).
- Black Entrepreneurship Program (25% vs. 16%).
- GC Business Insights Newsletter (25% vs. 17%).
- The 50-30 Challenge (23% vs. 13%).

As business size increased, familiarity with Government of Canada programs supporting SMEs increased for all listed programs.

Those aged 18 to 34 were more likely to report familiarity with the following programs compared to those 35 to 54 and those 55 and older:

- The Business Benefits Finder (21% vs. 9%, 5%).
- Black Entrepreneurship Program (21% vs. 10%, 3%).
- Intellectual Property Strategy (19% vs. 7%, 7%).
- The 50-30 Challenge (16% vs. 6%, 3%).

Those aged 18 to 34 and those 35 to 54 were more likely to be at least somewhat familiar with the following programs compared to those 55 and older:

- Canada Small Business Financing Program (23%, 17% vs. 9%).

- CyberSecure Canada (23%, 14% vs. 6%).
- Canada Digital Adoption Program (22%, 14% vs. 4%).
- Women Entrepreneurship Strategy (17%, 13% vs. 4%).
- The Canada Business App (16%, 13% vs. 5%).
- Innovative Solutions Canada (16%, 10% vs. 4%).
- GC Business Insights Newsletter (15%, 7% vs. 2%).
- Venture Capital Catalyst Initiative (14%, 11% vs. 4%).

Urban businesses were more likely to be at least somewhat familiar with the following programs compared to rural respondents:

- Canada Small Business Financing Program (19% vs. 9%).
- CyberSecure Canada (17% vs. 5%).
- Canada Digital Adoption Program (15% vs. 4%).
- The Business Benefits Finder (13% vs. 3%).
- Black Entrepreneurship Program (13% vs. 4%).
- The Canada Business App (13% vs. 5%).
- Global Innovation Clusters (12% vs. 4%).
- Strategic Innovation Fund (11% vs. 4%).
- Venture Capital Catalyst Initiative (11% vs. 4%).
- Intellectual Property Strategy (10% vs. 3%).
- Accelerated Growth Service (10% vs. 3%).
- Innovation Solutions Canada (9% vs. 3%).
- Clean Growth Hub (9% vs. 2%).
- GC Business Insights Newsletter (8% vs. 2%).

- The 50-30 Challenge (8% vs. 2%).

When evaluating awareness among equity group respondents, notable observations include:

- Among Black entrepreneurs, 61% were at least a little familiar with the Black Entrepreneurship Program.
- Among women entrepreneurs, 33% were at least a little familiar with the Women Entrepreneurship Program.

Figure 35 – Summary: Those very or somewhat familiar with Government of Canada programs supporting SMEs

Government of Canada Programs:	TOTAL (n=705)	Micro (n=300)	Small (n=302)	Medium (n=103)
Canada Small Business Financing Program	15%	12%	35%	46%
CyberSecure Canada	12%	9%	30%	37%
Canadian Digital Adoption Program	11%	8%	29%	36%
Regional Economic Growth through Innovation	10%	7%	31%	36%
The Canada Business App	10%	7%	28%	40%
Women Entrepreneurship Strategy	9%	7%	26%	36%
The Business Benefits Finder	9%	6%	32%	34%
Strategic Innovation Fund	9%	6%	28%	35%
Black Entrepreneurship Program	9%	6%	25%	24%
Venture Capital Catalyst Initiative	8%	6%	26%	35%
Intellectual Property Strategy	8%	6%	23%	35%
Innovative Solutions Canada	8%	4%	33%	42%
Accelerated Growth Service	8%	5%	28%	34%
Global Innovation Clusters	8%	5%	26%	28%
Biomanufacturing	7%	4%	23%	25%
The 50 - 30 Challenge	6%	4%	23%	31%
Clean Growth Hub	6%	3%	24%	30%
GC Business Insights Newsletter	6%	3%	25%	31%

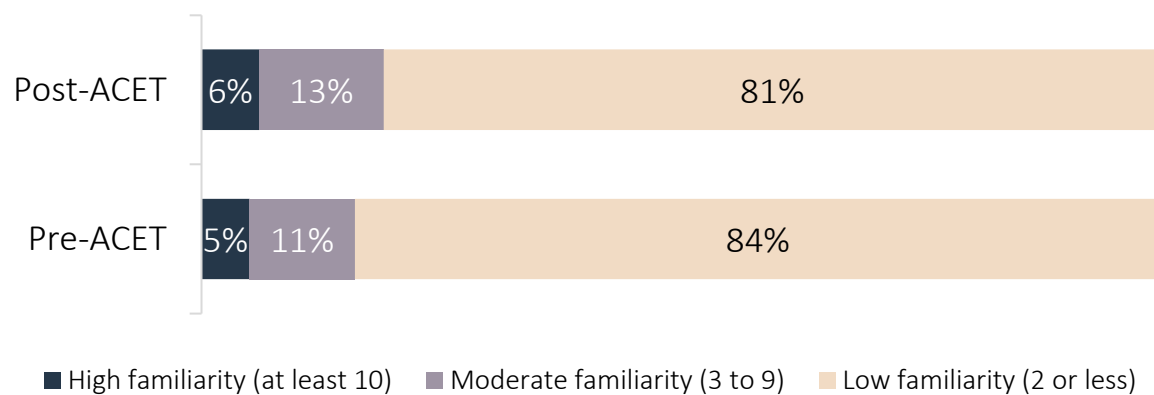
Q11. How familiar are you with each of the following Government of Canada programs designed to support Canadian businesses. If you have never heard of a particular program, feel free to select “not at all familiar”. Base: All respondents, Post-ACET, n=705.

Government Program Familiarity Index

The Government Program Familiarity Index was developed to produce an overall score based on the number of programs with which business respondents were at least somewhat familiar. Those that were at least somewhat familiar with at least 10 of the 18 programs were considered highly familiar overall, while those aware of 3 to 9 programs were considered moderately familiar, with low familiarity categorized as 2 or fewer.

Few business respondents (6%) could be considered highly familiar overall, with another 13% considered moderately familiar with government programs. Most business respondents (81%) were aware of 2 or fewer programs supporting SMEs. Familiarity with government programs increased slightly compared to results observed in the pre-campaign wave, most notably high familiarity among small businesses in the post-campaign wave compared to the pre-campaign wave (23% vs. 16%). A total of 13% of business respondents were not aware of a single government program supporting SMEs, down from 18% observed in the pre-campaign wave.

Figure 36 – Government Program Familiarity Index



Q11. How familiar are you with each of the following Government of Canada programs designed to support Canadian businesses. If you have never heard of a particular program, feel free to select “not at all familiar”. Base: All respondents, Pre-ACET, n=706; Post-ACET, n=705.

As business size increased, so did overall familiarity with the range of Government of Canada programs supporting SMEs. The proportion considered “highly familiar” increases from 3% among micro business respondents, to 23% among small businesses, and then to 33% among medium businesses.

Those 18 to 34 were more likely to demonstrate high familiarity with programs supporting SMEs compared to those 55 and older (14% vs. 3%).

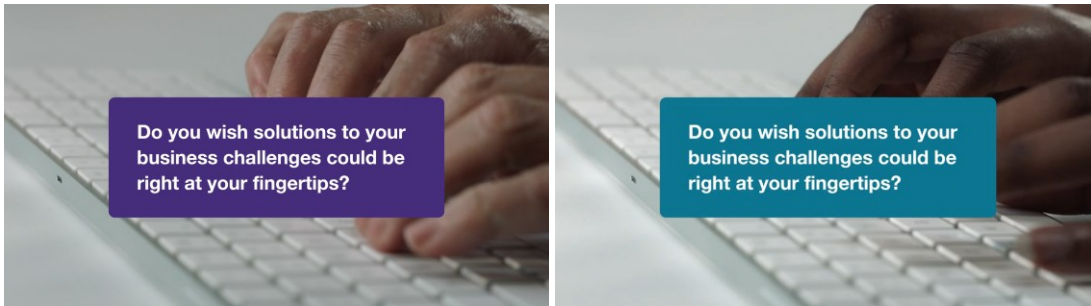
Businesses operating in Quebec (12%) were more likely to report high overall familiarity compared to those operating in Ontario (4%) or Western Canada (3%).

Businesses operating in urban locations were more likely to demonstrate high familiarity compared to those in rural locations (8% vs. 1%).

Awareness and understanding of campaign

Respondents were presented with a variety of video, animation, static social media and print advertisements featured in the business support campaign:

Television advertisements



Animation advertisements



Static banner advertisements



LinkedIn sponsored posts

 Innovation, Science and Economic Development Canada
162,412 followers
Promoted

Easily access numerous programs to find the funding* and resources you need.

*Subject to eligibility



*Subject to eligibility

 Canada

Get solutions to your business challenges right at your fingertips. [Learn more](#)

ISED-ISEC.CANADA.CA

 Innovation, Science and Economic Development Canada
162,412 followers
Promoted

Wish solutions to your business challenges could be right at your fingertips? They can be with the Government of Canada supports.

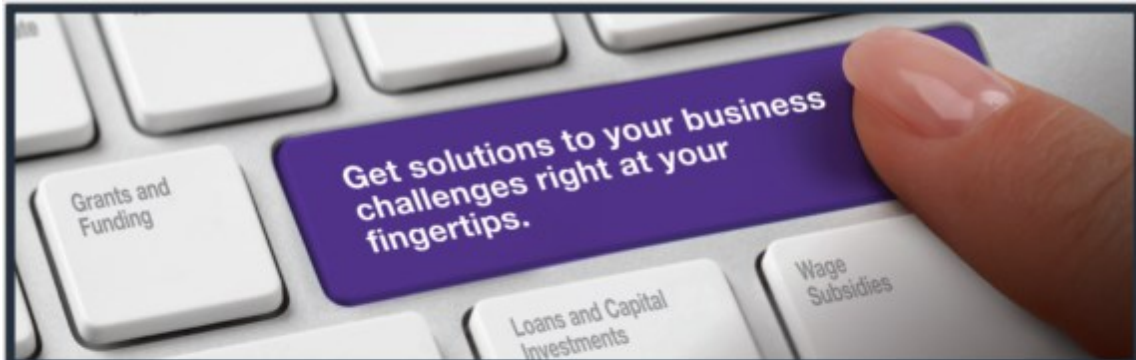



 Canada

Easily access numerous programs and services today. [Learn more](#)

ISED-ISEC.CANADA.CA


Print advertisements





> Easily access numerous programs with the funding* and resources you need at Canada.ca/supports-business

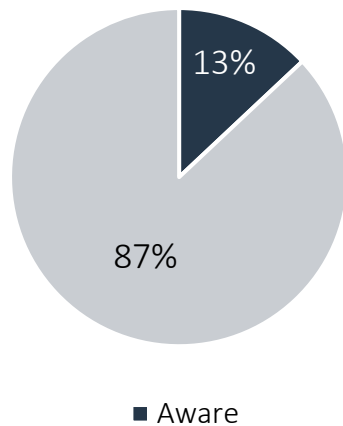
*Subject to eligibility

 Canada

Recent recall of campaign specific advertising

After being presented with a series of campaign specific advertisements (specifically highlighting easy access to hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs), 13% of business respondents reported having seen at least one related advertisement over the past few months.

Figure 37 – Recent awareness of campaign specific advertising – aided recall



QT1H. Over the past few months, have you seen, read, or heard any of these ads? Base: All respondents, Post-ACET, n=705.

As business size increased, likelihood to report have seen one of the presented advertisements increased, specifically as business size increased from micro (11%), to small (27%), to medium (45%).

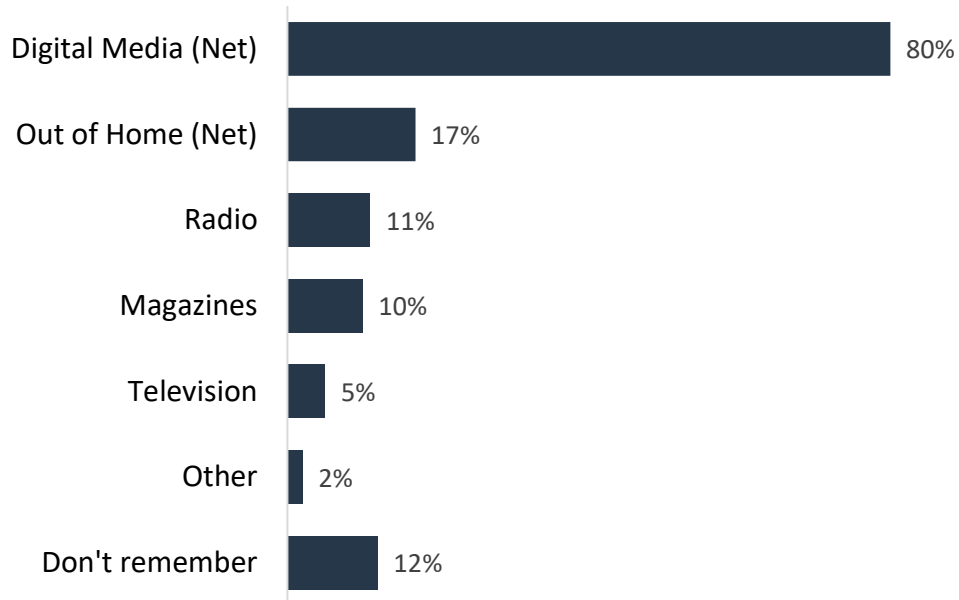
Those 18 to 34 (19%) and those 35 to 54 (18%) were more likely to report having seen one of the presented campaign specific advertisements compared to those 55 and older (6%).

Men were more likely to report having seen one of the specific advertisements compared to women (17% vs. 9%).

Source of recalled campaign advertising

Roughly 4 in 5 business respondents who recalled one of the presented campaign advertisements specified that they engaged with the advertisement via digital media (80%). Fewer recalled seeing the advertisement on billboards (17%), the radio (11%), in magazines (10%), or on television (5%).

Figure 38 – Where businesses recalled seeing/hearing campaign specific advertising



QT11. Where have you seen, read or heard these ads? Base: Respondents who have seen, read or heard the ads, Post-ACET, n=162.

As business size increased, likelihood to recall seeing the campaign advertisement via digital media increased, from micro (76%), to small (89%), to medium (98%).

Small sized business respondents were more likely to engage with out of home advertisements (37%) compared to micro (10%) and medium business respondents (16%).

A generic website (43%), YouTube (35%), online newspaper advertisements (31%), and generic web searches (18%) were the most cited digital media sources. Digital billboards were among the most cited sources of OOH campaign specific advertising (15%).

Figure 39 – Where businesses recalled seeing/hearing campaign specific advertising

Advertising sources:	Total (n=162)	Micro (n=32)	Small (n=83)	Medium (n=47)
Digital Media (Net)	80%	76%	89%	98%
Website	43%	38%	56%	51%
YouTube	35%	31%	42%	51%
Online news sites	31%	25%	47%	51%
Web search (e.g., Google, Bing)	18%	16%	24%	26%
Digital/Streaming radio (e.g., Spotify, Podcast)	10%	6%	21%	17%
X (formerly Twitter)	10%	7%	18%	24%
LinkedIn	8%	3%	22%	27%
Facebook*	2%	3%	1%	-
Out of Home (Net)	17%	10%	37%	16%
Digital Billboards	15%	10%	31%	9%
Billboards	8%	3%	22%	9%
Radio	11%	7%	24%	25%
Magazines	10%	3%	28%	18%
Television	5%	6%	2%	-
Other	2%	3%	-	-
Don't remember	12%	15%	4%	2%

QT11. Where have you seen, read or heard these ads? Base: Respondents who have seen, read or heard the ads, Post-ACET, n=162.

*Option was not presented to respondents

Medium and small sized business respondents were more likely to recall seeing or hearing campaign specific advertisements via the following specific sources compared to micro business respondents:

- Online news sites (51%, 47% vs. 25%).
- LinkedIn (27%, 22% vs. 3%).
- Radio (25%, 24% vs. 7%).
- Magazines (18%, 28% vs. 3%).

Small business respondents were more likely to recall seeing or hearing campaign specific advertisements via the following specific sources compared to micro business respondents:

- Highway billboards (22% vs. 3%).
- Digital/Streaming radio (21% vs. 6%).

Understanding of campaign messaging

After being presented with a series of campaign advertisements, business respondents were asked to specify the main point the advertisements were trying to convey. Most respondents felt the advertisements spoke especially of the variety of services available to support businesses of varying sizes (61%).

Nearly 1 in 5 business respondents cited a variety of general support options to help businesses succeed (17%), or that the advertisements were promoting ease of access to government programs or services (16%). Slightly fewer felt the ads promoted the availability of services in general (11%). A total of 10% of business respondents were not sure what the advertisements were trying to convey.

Figure 40 – Main points of campaign messaging – unaided

Specific mentions:	Post-ACET (n=705)
Variety of services (Net)	61%
Provide support to businesses/small businesses/local businesses	37%
Availability of different business resources/Variety of government programs to support businesses	23%
Offer various solutions to business challenges	3%
Offer support for different types of businesses/Helping businesses of all kinds	2%
Support (Net)	17%
Offers financial support for businesses/funding for local businesses	8%
Offer help to businesses to make them succeed/grow/profitable	4%
Helps businesses find the right support/resources	3%
Provides more information on how to handle business/Find information of what you're looking for	3%
Ease of access (Net)	16%
Ease of access to business support programs/government services	8%
Ability to get support through government website	8%
Centralized website/Consolidated place for businesses	1%
Promotion of services (Net)	11%
Provide awareness/information regarding the government's support programs and services	7%
Encourage the people to use the website/Visit their website	5%
Miscellaneous (Net)	4%
Offer support to the people/trying to help the community	3%
It is beneficial/useful/helpful for business offers	1%
Government of Canada (Net)	3%
Canada is open for business/Canada is good for business	3%
They are a great government/good organization	<1%
Invalid response	1%
Other	4%
Don't know/remember	10%

QT1J. What do you think is the main point of these ads are trying to get across? Base: All respondent, Post-ACET, n=705.

Micro business respondents were more likely to describe elements relating to the variety of services offered for businesses compared to medium business respondents (62% vs. 46%).

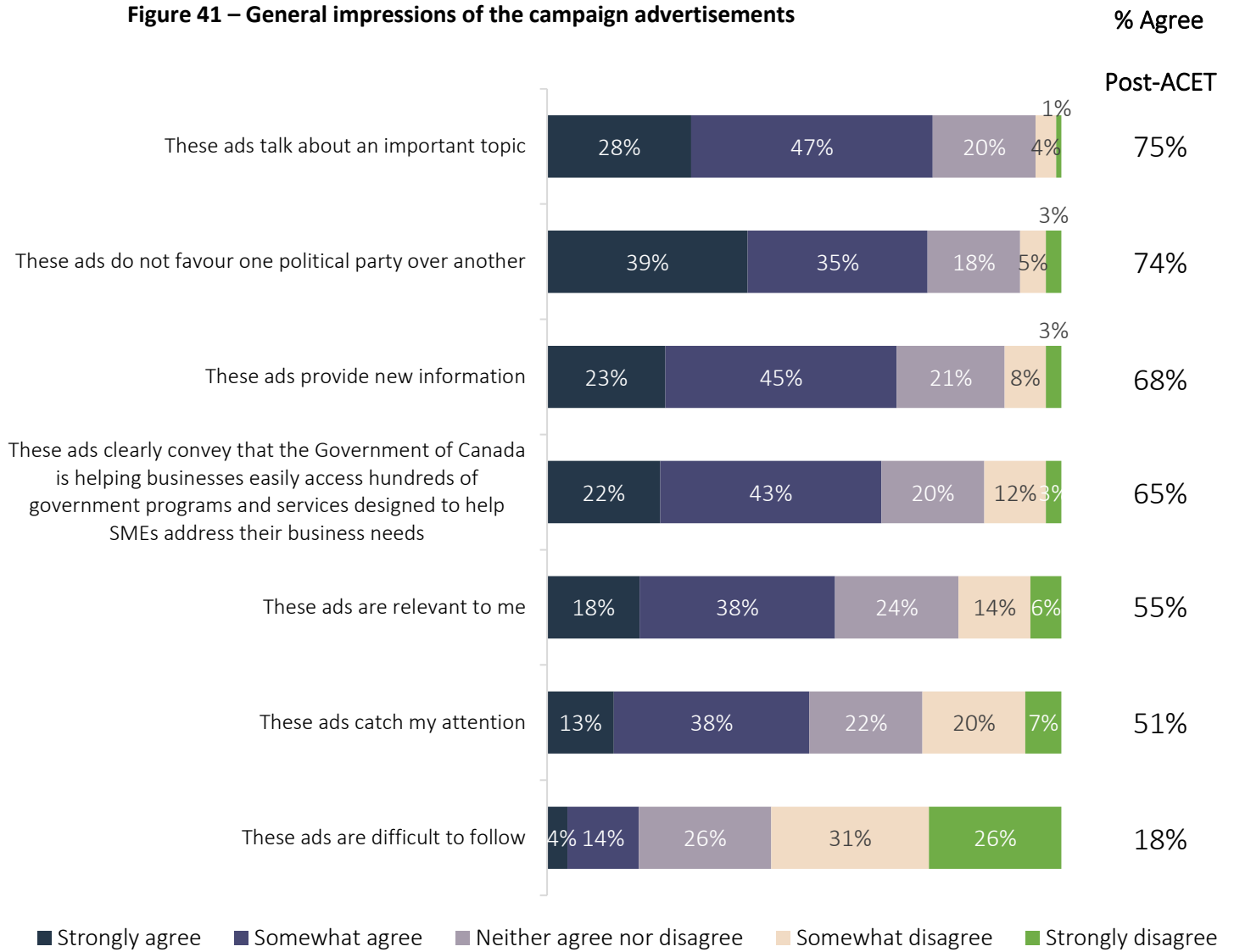
Medium sized business respondents were more likely to describe elements relating to ease of access of programs or services compared to small business respondents (24% vs. 12%).

Impressions of campaign advertisements

Perceptions of the campaign advertisements were measured by asking respondents the extent to which they agreed with a series of statements related to their interpretation of the messaging on a scale of 1 to 5 (where 5 represented strongly disagree and 1 was strongly agree). Overall, more than half of respondents at least somewhat agreed with each of the positive impression statements, while fewer respondents agreed that the campaign advertisements were difficult to follow (18%).

More specifically, roughly three quarters of business respondents strongly or somewhat agreed that the advertisements were covering an important topic (75%) and demonstrated political neutrality (74%). Roughly 2 in 3 business respondents agreed that the advertisements provide new information (68%) and clearly convey the government is helping businesses access programs and services to help address their business needs (65%). Agreement was slightly lower when it comes to relevance (55%) and capturing attention (51%).

Figure 41 – General impressions of the campaign advertisements



QT1K. On a scale of 1 to 5, please indicate your level of agreement with the following statements about these ads. Base: All respondents, Post-ACET, n=705.

Medium and small business respondents were more likely to at least somewhat agree with the following statements compared to micro business respondents:

These ads...

- clearly convey the government is helping businesses access programs and services to help address their business needs (83%, 74% vs. 64%).
- are relevant to me (74%, 71% vs. 53%).
- catch my attention (74%, 63% vs. 49%).

Women were more likely to at least somewhat agree that these ads talk about an important topic compared to men (79% vs. 70%).

Those aged 35 to 54 were more likely to at least somewhat agree with the following statements compared to those 55 years and older:

These ads...

- talk about an important topic (81% vs. 68%).
- catch my attention (56% vs. 45%).

Those aged 18 to 34 (65%) and those 35 to 54 (67%) were more likely to agree that these ads are relevant to them compared to those 55 years and older (41%).

Respondent Profile – Pre-ACET

Segment	Unweighted	Weighted	Segment	Unweighted	Weighted
Business Role			Gender		
Owner / Partner	67%	89%	Male	58%	49%
Senior Manager	33%	11%	Female	42%	50%
Business Size			Other	<1%	<1%
1	25%	51%	Prefer not to say	-	-
2-4	18%	36%	Location		
5-24	20%	6%	Urban area	52%	44%
25-49	12%	4%	Suburban area	30%	32%
50-99	10%	3%	Small community	6%	8%
100-249	10%	<1%	Rural area	10%	15%
250-499	4%	<1%	Northern/Remote area	<1%	<1%
Micro (NET)	43%	87%	Rural (NET)	17%	23%
Small (NET)	42%	12%	Don't know / Prefer not to say	<1%	1%
Medium (NET)	14%	1%	Industry Sectors		
Region			Agriculture, forestry, fishing and hunting	3%	3%
Alberta	12%	13%	Mining, quarrying, and oil and gas extraction	1%	1%
British Columbia	13%	14%	Utilities	1%	2%
Manitoba	5%	4%	Construction	8%	6%
New Brunswick	3%	2%	Manufacturing	8%	4%
Newfoundland and Labrador	1%	<1%	Wholesale trade	3%	3%
Northwest Territories	<1%	<1%	Retail trade	10%	11%
Nova Scotia	3%	2%	Transportation and warehousing	3%	2%
Nunavut	<1%	<1%	Information and cultural industries	2%	2%
Ontario	35%	39%	Finance and insurance	5%	4%
Prince Edward Island	1%	<1%	Real estate and rental and leasing	4%	6%
Quebec	23%	21%	Professional, scientific and technical services	18%	24%
Saskatchewan	3%	4%	Management of companies and enterprises	2%	1%
Yukon	<1%	<1%	Administrative and support, waste management and remediation services	1%	5%
Age			Educational services	2%	3%
18 to 24	2%	1%	Health care and social assistance	6%	8%
25 to 34	12%	6%	Arts, entertainment and recreation	6%	9%
35 to 44	22%	17%	Accommodation, food services and tourism	4%	5%
45 to 54	19%	19%	Public administration	<1%	<1%
55 to 64	25%	28%	Other	14%	20%
65 or older	21%	29%			

Respondent Profile – Pre-ACET

Segment	Unweighted	Weighted	Segment	Unweighted	Weighted
Business Ownership			Self-Identification Groups		
Women	35%	43%	Women	34%	43%
Member(s) of another racialized community	10%	6%	Member(s) of another racialized community	10%	8%
Person(s) living with a disability	6%	6%	Person(s) living with a disability	7%	8%
Member(s) of the 2SLGBTQIA+ community	5%	6%	Member(s) of the 2SLGBTQIA+ community	6%	7%
Persons younger than 40 years old	8%	6%	Persons younger than 40 years old	10%	8%
Black persons and/or person(s) of African decent	5%	4%	Black persons and/or person(s) of African decent	5%	3%
Indigenous person(s) including First Nations, Inuit and Métis	4%	2%	Indigenous person(s) including First Nations, Inuit and Métis	5%	2%
Recent immigrant(s) to Canada (i.e., landed in Canada in the last 5 years)	4%	3%	Recent immigrant(s) to Canada (i.e., landed in Canada in the last 5 years)	3%	2%
None of the above	45%	41%	None of the above	42%	37%
Don't know / Prefer not to say	3%	3%	Don't know / Prefer not to say	2%	2%

Respondent Profile – Post-ACET

Segment	Unweighted	Weighted	Segment	Unweighted	Weighted
Business Ownership			Self-Identification Groups		
Women	35%	46%	Women	38%	50%
Member(s) of another racialized community	11%	9%	Member(s) of another racialized community	11%	8%
Person(s) living with a disability	7%	8%	Person(s) living with a disability	8%	10%
Member(s) of the 2SLGBTQIA+ community	5%	5%	Member(s) of the 2SLGBTQIA+ community	6%	6%
Persons younger than 40 years old	10%	10%	Persons younger than 40 years old	14%	13%
Black persons and/or person(s) of African decent	6%	4%	Black persons and/or person(s) of African decent	6%	4%
Indigenous person(s) including First Nations, Inuit and Métis	8%	3%	Indigenous person(s) including First Nations, Inuit and Métis	7%	3%
Recent immigrant(s) to Canada (i.e., landed in Canada in the last 5 years)	5%	2%	Recent immigrant(s) to Canada (i.e., landed in Canada in the last 5 years)	4%	3%
None of the above	39%	35%	None of the above	33%	30%
Don't know / Prefer not to say	5%	4%	Don't know / Prefer not to say	2%	3%

Respondent Profile – Post-ACET

Segment	Unweighted	Weighted	Segment	Unweighted	Weighted
Business Role			Gender		
Owner / Partner	70%	91%	Male	55%	46%
Senior Manager	30%	9%	Female	44%	54%
Business Size			Other	<1%	<1%
1	25%	51%	Prefer not to say	-	-
2-4	18%	36%	Location		
5-24	19%	5%	Urban area	54%	44%
25-49	10%	3%	Suburban area	27%	30%
50-99	14%	4%	Small community	6%	8%
100-249	10%	<1%	Rural area	11%	17%
250-499	4%	<1%	Northern/Remote area	1%	1%
Micro (NET)	43%	87%	Rural (NET)	18%	26%
Small (NET)	43%	12%	Don't know / Prefer not to say	<1%	<1%
Medium (NET)	15%	1%	Industry Sectors		
Region			Agriculture, forestry, fishing and hunting	3%	4%
Alberta	14%	15%	Mining, quarrying, and oil and gas extraction	1%	1%
British Columbia	13%	12%	Utilities	1%	2%
Manitoba	4%	5%	Construction	12%	9%
New Brunswick	2%	1%	Manufacturing	6%	4%
Newfoundland and Labrador	1%	1%	Wholesale trade	3%	1%
Northwest Territories	1%	<1%	Retail trade	13%	13%
Nova Scotia	3%	2%	Transportation and warehousing	3%	3%
Nunavut	-	-	Information and cultural industries	2%	2%
Ontario	35%	39%	Finance and insurance	5%	2%
Prince Edward Island	<1%	<1%	Real estate and rental and leasing	3%	3%
Quebec	24%	21%	Professional, scientific and technical services	13%	21%
Saskatchewan	3%	3%	Management of companies and enterprises	2%	3%
Yukon	<1%	<1%	Administrative and support, waste management and remediation services	1%	5%
Age			Educational services	4%	5%
18 to 24	2%	1%	Health care and social assistance	6%	7%
25 to 34	14%	11%	Arts, entertainment and recreation	6%	10%
35 to 44	26%	19%	Accommodation, food services and tourism	3%	4%
45 to 54	24%	24%	Public administration	<1%	<1%
55 to 64	21%	25%	Other	11%	18%
65 or older	12%	19%			

Detailed methodology

Qualitative research

Overview: The research methodology consisted of nine online focus groups and four one-on-one web-assisted depth interviews. The focus groups and interviews were conducted with Canadian small to medium-sized enterprises (SMEs). Businesses were segmented into two categories, with a first segment focusing on smaller companies with a business size between 1 to 40 employees, while a second segment focused on SME's with a business size between 41 to 500 employees. Focus groups and interviews included businesses from across the country.

Quorus was responsible for coordinating all aspects of the research project including working with Innovation, Science and Economic Development (ISED) in designing and translating the recruitment screener and the moderation guides, coordinating all aspects of participant recruitment, managing the online interviewing platform and related logistics, moderating all sessions and interviews and delivering required reports at the end of data collection. The research approach is outlined in greater detail below.

Target audience and sample frame

The research consisted of two broad segments of the business community:

- **Segment 1 – Canadian micro (0-4 employees) and small (5-40 employees) enterprises (SMEs)**
- **Segment 2 – Canadian small (41-99 employees) to medium (100-500 employees) enterprises (SMEs)**

Within both segments, the research recruitment considered, on a best-effort basis, the following demographic groups:

- large and small urban centres, as well as ex-urban, suburban and rural centres
- representation of men and women entrepreneurs

- underrepresented employment equity groups including: women entrepreneurs, Indigenous entrepreneurs, Black entrepreneurs, racialized entrepreneurs, entrepreneurs with a disability and 2SLGBTQIA+ entrepreneurs

In addition to the general participant profiling criteria noted above, additional screening measures to ensure quality respondents include the following:

- No participant was recruited who worked for any of the following types of companies: a corporate chain or franchise; a registered charity; a multi-level marketing company; a real estate brokerage.
- No participant acquainted with another participant was knowingly recruited for the same study, unless they were recruited into separately scheduled sessions.
- No participant was recruited who had attended a qualitative research session within the past six months.
- No participant was recruited who had attended five or more qualitative research sessions in the past five years.

Description of data collection procedures

Data collection consisted exclusively of online focus groups and individual depth interviews. Each focus group lasted approximately 90 minutes while interviews lasted approximately 45 minutes.

Across the groups, six participants were recruited to achieve five to six participants per session. Participants invited to participate in the focus groups and depth interviews were recruited through a combination of random digit dialing by telephone and through the use of a proprietary database. These research candidates were screened using a traditional recruitment screener to ensure they met the target audience definitions for this study.

The recruitment of focus group and depth interview participants followed the screening, recruiting and privacy considerations as set out in the *Standards for the Conduct of Government of Canada Public Opinion Research—Qualitative Research*. Furthermore, recruitment respected the following requirements:

- All recruitment was conducted in the participant's official language of choice, English and French, as appropriate.
- Upon request, participants were informed on how they can access the research findings.
- Upon request, participants were provided Quorus' privacy policy.
- Recruitment confirmed each participant had the ability to speak, understand, read and write in the language in which the session was to be conducted.
- Participants were informed of their rights under the *Privacy and Access to Information Acts* and ensure that those rights were protected throughout the research process. This included: informing participants of the purpose of the research, identifying both the sponsoring department or agency and research supplier, informing participants that the study will be made available to the public in 6 months after field completion through Library and Archives Canada, and informing participants that their participation in the study is voluntary and confidential and the information provided will be administered according to the requirements of the *Privacy Act*.

At the recruitment stage and at the beginning of each focus group/depth interview, participants were informed that the research was for the Government of Canada/ISED. Participants were informed of the audio/video recording of their session in addition to the presence of ISED observers. Quorus ensured that prior consent was obtained at the recruitment stage and before participants began their focus group or interview session.

All online focus groups were conducted in the evening after regular business hours, while all online depth interviews were conducted during regular business hours or during evenings (whatever suited the respondent's availability and preferences). The research team used the Zoom platform to host and record sessions (through microphones and webcams connected to the moderator and participants' electronic devices, such as their laptops or tablets) enabling client remote viewing.

Focus group and interview participants were each offered an honorarium of \$250.

Online focus groups

A total of nine online focus groups were conducted across Canada. In each region, two focus groups were held, one with each target audience. The regional breakdown is as follows:

- Ontario/Nunavut
- Atlantic Canada (mix of the four provinces)
- British Columbia/Yukon
- Quebec
- Manitoba/Saskatchewan/Northwest Territories

The details of these groups are outlined in the table below.

Date	Time (EDT)	Region	Segment	Language	Number of participants
Monday, September 25, 2023	5:00 PM	Atlantic Canada	Segment 1	English	5
	7:00 PM	Ontario / Nunavut	Segment 1	English	6
Tuesday, September 26, 2023	5:30 PM	Quebec	Segment 1	French	5
	8:00 PM	Alberta / Northwest Territories	Segment 1	English	6
	10:00 PM	British Columbia / Yukon	Segment 1	English	5
Wednesday, September 27, 2023	5:30 PM	Eastern Canada (Quebec / Atlantic Canada)	Segment 2	French	6
	8:00 PM	Manitoba / Saskatchewan / Northwest Territories	Segment 1	English	6
Thursday, September 28, 2023	6:00 PM	Ontario / Nunavut	Segment 2	English	6
	8:00 PM	British Columbia / Alberta / Manitoba / Saskatchewan / Yukon / Northwest Territories	Segment 2	English	6
TOTAL: 51					

Online depth interviews

A total of four one-on-one online depth interviews were conducted with participants from both Segment One and Segment Two, with a goal of recruiting a mix across region and sociodemographic characteristics.

The scheduling and details of the sessions are outlined in the table below:

Date	Time (EDT)	Region	Segment	Language
Friday, September 29, 2023	10:00 AM	Nunavut	Segment 1	English
Friday, September 29, 2023	4:00 PM	Quebec	Segment 1	French
Friday, September 29, 2023	6:30 PM	Quebec	Segment 1	English
Saturday, September 30, 2023	10:30 AM	Quebec	Segment 2	English

Qualitative Research Disclaimer

Qualitative research seeks to develop insight and direction rather than quantitatively projectable measures. The purpose is not to generate “statistics” but to hear the full range of opinions on a topic, understand the language participants use, gauge degrees of passion and engagement and to leverage the power of the group to inspire ideas. Participants are encouraged to voice their opinions, irrespective of whether or not that view is shared by others.

Due to the sample size, the special recruitment methods used, and the study objectives themselves, it is clearly understood that the work under discussion is exploratory in nature. The findings are not, nor were they intended to be, projectable to a larger population.

Specifically, it is inappropriate to suggest or to infer that few (or many) real world users would behave in one way simply because few (or many) participants behaved in this way during the sessions. This kind of projection is strictly the prerogative of quantitative research.

Quantitative research

Overview

The research consisted of two waves of online surveys with small and medium-sized businesses: a baseline survey and a post-campaign survey. The baseline survey consisted of 706 SMEs conducted between October 13 and November 9, 2023. The post-ACET survey consisted of 705 SMEs conducted between March 18 and April 12, 2024.

The target SMEs were Canadian businesses and included decision-makers whose job titles included:

- Owner/Partner
- Senior Manager

Questionnaire Design

The questions utilized in this study were provided by ISED. Quorus reviewed the questions, providing suggestions and preparing them in a format suitable for online data collection. As required by the [Standards for the Conduct of Government of Canada Public Opinion Research—Online Surveys](#), English and French pre-test surveys were conducted (more details related to the pre-tests are provided further in this methodology section).

Sampling

The survey questionnaires were administered online. The sampling was designed to achieve 700 completed surveys per wave. Both waves of research were conducted using non-probability sampling via a commercially available online panel of business respondents.

Quorus utilized the services of an online panel records provider, Dynata, for this research. Panelists are recruited from a large number of sources to increase diversity and representation. This includes loyalty panels, organic, open enrollment and partnerships, and an affiliate network. Dynata uses robust panel management techniques to monitor the quality of data through various quality checks such as participation limits, screening questions, digital fingerprinting, random and illogical responding, capturing and removing flat-liners and speeders.

Dynata also regularly measures participant satisfaction on elements such as frequency of invitations, value and diversity of incentives and redemption choices, their willingness to complete various lengths of surveys, and level of responsiveness to any questions or concerns they share with Dynata’s Member Services team.

Regional and business size targets were established to ensure robust regional representation across the country and to ensure consistency in the distribution of completed surveys with previous Government of Canada ACET research.

The business size and regional targets for both the baseline and post-ACET waves were as follows:

Business Size	Target Completions
Micro (< 5 employees)	300
Small (5 < 99 employees)	300
Medium (100 < 499 employees)	100
Total	700

Region	Baseline Target Completions	Post-ACET Target Completions
Atlantic Canada (~20 in each of NB and NS, ~5 in each of NFLD/Lab and PEI)	50	51
Quebec	160	162
Ontario	240	244
Western Canada (~80 in each of BC and AB and 70 in SK/MB)	230	233
Territories	20	10 ⁷
Total	700	700

⁷ The regional targets for the post-ACET wave were slightly adjusted based on challenges reaching the preliminary target set for the Territories in the baseline wave.

Administration

The online surveys utilized were programmed by Quorus in both English and French. Respondents were formally invited to the survey in the official language of their choice. As well, at any point when completing the questionnaire, respondents had the option to change the questionnaire language to the other official language. Assistance in completing the survey was available from bilingual staff, as required. Respondents were able to verify the legitimacy of the survey via contacting representatives of Dynata, or via an email inquiry to the Canadian Research Insights Council. The programmed survey was tested to ensure question order and skip patterns were properly implemented. ISED staff were also provided with the pre-test link and thus client feedback also was incorporated prior to the launch of the survey.

A total of 10 English and 10 French pre-tests were completed for the baseline survey, and a total of 11 English and 9 French pre-tests were completed for the post-ACET wave. These pre-test survey completions were conducted via a survey “soft launch” whereby a small number of panel respondents were invited to participate in the survey. The pre-testing of the survey allowed the collected data to be reviewed to ensure accuracy and to identify any programming aspects that should be modified. In addition to the actual survey queries, a section was included at the end of the questionnaire to ascertain respondent comprehension and experience with the survey. No changes in the survey instrument were made as a result of this endeavour, however, one survey was removed from the final sample due to quality concerns.

In online panel studies, reminder notices are forwarded to sampled respondents if they have not completed an online study in the recent past, or if the data collection for a given study is not on target to be completed by the desired end date. In the current instance, business panelists were identified and initially notified of the study. As the desired data collection end date approached, the current study was prioritized within the survey queue of each potential business respondent. That is, few or no other surveys beyond the current ISED commissioned research would have been available on the survey dashboard of these business panelists. Via this process, the targeted number of survey completions were almost achieved within the desired timeframe. Fieldwork was monitored on an ongoing basis to ensure quotas were being met. Given that single use unique survey links were made available to panelists, no respondent was able to complete the survey questionnaire more than once.

A total of 706 surveys were submitted by baseline survey respondents, requiring an average of approximately 7 minutes for respondents to complete. A total of 705 surveys were submitted in the post-ACET wave, with an average completion duration of 11 minutes.

Respondents were drawn from an online Canadian business panel. All such panels are inherently non-probabilistic in nature given that panelists self-select to become members of such panels, and not everyone in the target audience who is eligible to participate in the survey, indeed belongs to the panel.

Given that this online survey methodology used a non-probability sample, the data collected cannot be extrapolated to the overall population of Canadian SMEs. As well, given that the online methodology utilized a non-probability sample, a margin of error cannot be applied to the results as per the Standards for the Conduct of Government of Canada Public Opinion Research for Online Surveys.

That said, minimum quotas were established for regions, to ensure a robust representation of completed surveys from across the country, while also respecting the fact that the largest proportions of target organizations are from the most heavily populated provinces and regions of the country.

Regional targets (baseline survey):

Region	Quota targets (n=)	Quota targets (%)	Surveys completed (unweighted) (n=)	Surveys completed (unweighted) (%)
Atlantic Canada (~20 in each of NB and NS, ~5 in each of NFLD/Lab and PEI)	50	7%	52	7%
Quebec	160	23%	162	23%
Ontario	240	34%	246	35%
Western Canada (~80 in each of BC and AB and 70 in SK/MB)	230	33%	239	34%
Territories	20	3%	7	1%

Regional targets (post-ACET survey):

Region	Quota targets (n=)	Quota targets (%)	Surveys completed (unweighted) (n=)	Surveys completed (unweighted) (%)
Atlantic Canada (~20 in each of NB and NS, ~5 in each of NFLD/Lab and PEI)	51	7%	45	6%
Quebec	162	23%	170	24%
Ontario	244	35%	244	35%
Western Canada (~80 in each of BC and AB and 70 in SK/MB)	233	33%	240	34%
Territories	10	1%	6	1%

In addition to regional quotas, targets were set for the business size of SMEs based on the number of employees working for each respective company.

Business size targets:

Business size	Quota targets (n=)	Quota targets (%)	Baseline completions (unweighted) (n=)	Baseline completions (unweighted) (%)	Post-ACET completions (unweighted) (n=)	Post-ACET completions (unweighted) (%)
1-4	300	43%	304	43%	300	43%
5-99	300	43%	300	43%	302	43%
100+	100	14%	102	14%	103	15%

A participation rate could not be calculated for SMEs due to the data collection process utilized by the online panel provider Dynata. Rather than utilizing emails as the primary way to bring people into the survey, participants logged into their dashboard when convenient or responded to a generic text, email, or an app notification. Dynata utilized a router system which directed respondents into the survey they were targeted for, using a complex algorithm which includes a robust randomization strategy. Respondents entered their panel dashboard and, after being asked a few questions to refine targeting, were directed into the specific survey. Respondents did not choose the survey they were directed to, but were allocated based on the algorithm, which determined the match between a given panelist’s profile and the needs of the survey.

The tables below display regional, and business size data in terms of the actual distribution of Canadian SMEs, as catalogued in Statistics Canada’s Business Register. As well, target quotas and completed surveys for each region, and business size segment are detailed (both in terms of the actual *number* of surveys completed, and the *percentage* of all surveys completed). The tables on the pages below present data with the weighted and unweighted *number* as well as *percentage* of surveys collected.

Data Tabulation: Random Iterative Method (RIM) statistical weighting was used factoring in number of businesses by region (5 regions: Atlantic, Quebec, Ontario, Western Canada, Territories) and overall business size (3 segments: micro, small, and medium), based on population data obtained from Statistics Canada’s Business Register, reflecting totals as of June 2023:

- Regional results for small (+1) and medium-sized business:
<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310071701>
- Regional results for small “non-employee” companies:
<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310071801>

Baseline Survey (Percentages may not sum exactly to 100%, owing to rounding):

Subsegments	2023 total	Quota target (n=)	Quota target (%)	Surveys completed (unweighted) (n=)	Surveys completed (unweighted) (%)	Surveys completed (weighted) (n=)	Surveys completed (weighted) (%)
Region – Atlantic Canada	4.6%	50	7.1%	52	7.4%	33	4.6%
Region – Quebec	21.0%	160	22.9%	162	22.9%	148	21.0%
Region – Ontario	39.2%	240	34.3%	246	34.8%	277	39.2%
Region – Western Canada	34.9%	230	32.9%	239	33.9%	247	34.9%
Region – Territories	0.2%	20	2.9%	7	1.0%	2	0.2%
Business Size – Micro <5	87.1%	300	42.9%	304	43.1%	615	87.1%
Business Size – Small 5 < 99	12.4%	300	42.9%	300	42.5%	87	12.4%
Business Size – Medium 100 < 499	0.5%	100	14.3%	102	14.4%	4	0.5%

Post-ACET Survey (Percentages may not sum exactly to 100%, owing to rounding):

Subsegments	2023 total	Quota target (n=)	Quota target (%)	Surveys completed (unweighted) (n=)	Surveys completed (unweighted) (%)	Surveys completed (weighted) (n=)	Surveys completed (weighted) (%)
Region – Atlantic Canada	4.6%	50	7.1%	45	6%	33	4.6%
Region – Quebec	21.0%	160	22.9%	170	24%	148	21.0%
Region – Ontario	39.2%	240	34.3%	244	35%	276	39.1%
Region – Western Canada	34.9%	230	32.9%	240	34%	246	34.9%
Region – Territories	0.2%	20	2.9%	6	1%	2	0.2%
Business Size – Micro <5	87.1%	300	42.9%	300	43%	614	87.1%
Business Size – Small 5 < 99	12.4%	300	42.9%	302	43%	87	12.3%
Business Size – Medium 100 < 499	0.5%	100	14.3%	103	15%	4	0.5%

Non-Response Bias Analysis

Any survey that is conducted is potentially subject to bias or error. When a survey is conducted with a sample of the population, there are two general classes of bias or error: sampling error, which is quantifiable, and non-sampling error, which is typically not quantifiable. Sampling error arises from the fact that surveys are conducted with only a subset of the population, and thus it is possible that the results obtained from this group of respondents is not reflective of the population as a whole. In contrast, non-sampling error encompasses a number of different types of errors including coverage error, measurement error, non-response error, and processing error. No measurement of sampling error can be attributed to this online study, given that the contact records utilized in the data collection process were derived from an online panel of the target audience, which is to say, a non-probability sample source. Having stated that, measures were taken in the implementation of the data collection to ensure robust geographic representation from across the country.

With respect to non-sampling error, a number of steps were taken to minimize bias. Survey programming technology was utilized to ensure proper survey skip patterns were followed and to minimize errors due to data entry and data capture. The French and English survey instruments themselves were pre-tested with a small sample of respondents to ensure the survey material was easily understood by respondents, and that the resultant data were being captured properly.

Quotas were established by region and business size, with underrepresented segments up-weighted or down-weighted in the final data set to ensure the sample mirrored the true proportion of Canadian SMEs as reflected in Statistics Canada's Business Register.

The online survey was conducted with an online panel of the target audience, based on a randomized sampling of panel records for the target audience drawn from a reputable commercially available online general public panel.

Appendices

Appendix A: Recruitment screener – focus groups

SME Recruitment Screener

Focus Group Target Audiences

Segment 1 – Canadian micro (0-4 employees) and small (5-40 employees) enterprises (SMEs)

Segment 2 – Canadian small (41-99 employees) to medium (100-500 employees) enterprises (SMEs)

- Incentive: \$250
- Recruit 6 for 5 to 6 to show

For both Segment 1 and 2:

The target populations for both segments of research includes owners, partners and senior management of micro, small and medium Canadian enterprises, specifically those seeking to access to government support to grow their business and those business intermediaries who specialize in helping SMEs access the federal supports.

For both segments, recruit on a best effort basis the following segments:

- large and small urban centres, as well as ex-urban, suburban and rural centres
- representation of men and women entrepreneurs
- underrepresented employment equity groups including: women entrepreneurs, Indigenous entrepreneurs, Black entrepreneurs, racialized entrepreneurs, disabled entrepreneurs, entrepreneurs from Official Language Minority Communities, and 2SLGBTQIA+ entrepreneurs

All session are 90 minutes.

All times are stated in local area time unless specified otherwise:

Group 1
Atlantic Canada
Sept 25
6 pm ADT
Segment 1

Group 2
Ontario/Nunavut
Sept 25
7 pm EDT
Segment 1

Group 3
Quebec - FR
Sept 26
5:30 pm EDT
Segment 1

Group 4
Alberta/NWT
Sept 26
6 pm MDT
Segment 1

Group 5
BC/Yukon
Sept 26
7 pm PDT
Segment 1

Group 6
Eastern Canada
(Quebec/Atlantic) - FR
Sept 27
5:30 pm EDT
Segment 2

Group 7
Man/Sask/NWT
Sept 27
7 pm CDT / 6 pm
MDT/CST
Segment 1

Group 8
Ontario/Nunavut**
Sept 28
6 pm EDT
Segment 2

Group 9
BC/AB/MB/SK/YK/NWT
Sept 28
5 pm PDT / 6 pm MDT /
7 pm CDT
Segment 2

*** Allow English participants from Atlantic Canada or Manitoba/Saskatchewan in this group.*

One-on-One Interview

One-on-one interviews will be leveraged to round out representation from segments including, but not limited to:

- underrepresented employment equity groups including: women entrepreneurs, Indigenous entrepreneurs, Black entrepreneurs, racialized entrepreneurs, disabled entrepreneurs and 2SLGTBQIA+ entrepreneurs
- Canadian entrepreneurs "North of 60" including those from Yukon, Northwest Territories, Nunavut, northern Quebec and northern Labrador
- Official language minority participants (OLMC entrepreneurs – e.g., Anglophone entrepreneur in Quebec, or a Francophone entrepreneur outside Quebec and New Brunswick)
- IDIs can be completed with businesses of any segment of the target audience (Segment 1 or Segment 2). The purpose of IDIs is to ensure adequate representation of the regional, equity, and sectoral target groups where natural incidence in the focus groups is insufficient.

<p><u>Tele-Web Depth Interviews:</u></p> <ul style="list-style-type: none">• Up to six hard to reach entrepreneurs	<p>Details: Mix of English and French Incentive: \$250 45-minute sessions</p>
--	--

A. Introduction

Hello, my name _____. I'm calling from Quorus Consulting, a Canadian public opinion research company and we are calling on behalf of the Government of Canada.

Would you prefer to continue in English or French? / Préférez-vous continuer en anglais ou en français?

[INTERVIEWER NOTE: FOR ENGLISH GROUPS/INTERVIEWS, IF PARTICIPANT WOULD PREFER TO CONTINUE IN FRENCH, PLEASE RESPOND WITH, "Malheureusement, nous recherchons des gens qui parlent anglais pour participer à cette recherche. Nous vous remercions de votre intérêt." FOR FRENCH GROUPS/INTERVIEWS, IF PARTICIPANT WOULD PREFER TO CONTINUE IN ENGLISH, PLEASE RESPOND WITH, "Unfortunately, we are looking for people who speak French to participate in this research. We thank you for your interest."]

From time to time, we solicit opinions of Canadians by sitting down and talking with people just like you. We are preparing to conduct a series of these discussions on behalf of the Government of Canada with small and medium sized businesses and I would like to speak to someone in your company who makes decisions when it comes to growing your business. Is there a person available who fits that description? ...this is most likely the business owner, a director, or a key decision maker responsible for scoping out and assessing federal government programs, services, and initiatives developed for small and medium sized businesses.

ONCE APPROPRIATE CONTACT HAS BEEN REACHED – REPEAT INTRO IF NEEDED AND CONTINUE:

We are reaching out to you today to invite you to a research session to hear 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.

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. For their time, participants will receive a cash compensation.

Participation is voluntary and all opinions will remain anonymous and confidential, and will be used for research purposes only in accordance with laws designed to protect your privacy, including the Privacy Act and the Access to Information Act. We are simply interested in hearing your opinions, no attempt will be made to sell you anything. The format will be an online “round table” discussion lead by a research professional.

[INTERVIEWER NOTE: IF ASKED ABOUT PRIVACY LAWS, SAY: “The information collected through the research is subject to the provisions of the Privacy Act, legislation of the Government of Canada, and to the provisions of relevant provincial privacy legislation.”]

But before we invite you to attend, we need to ask you a few questions to ensure that we get a good mix of businesses. This should only take about 5 minutes. In case you are uncertain, **all my questions pertain to your company’s Canadian operations.** May I ask you a few questions?

Yes	1	CONTINUE
No	2	THANK & TERMINATE

B. Business and Participant Profile

1. How would you rate your own level of familiarity with the decisions your company takes when it comes to researching and using federal government programs and initiatives to support and grow your company? Would you say you are... **READ OPTIONS - RECRUIT A MIX.**

- Very familiar
- Fairly familiar
- Not very familiar
- Not at all familiar

IF NOT VERY OR NOT AT ALL FAMILIAR, ASK: *Since this will be one of the themes discussed, is there someone else in your company who would be more familiar with these types of decisions?*

- **IF YES, ASK TO SPEAK WITH THAT PERSON INSTEAD**
- **IF NO, THANK AND TERMINATE**

2. Is your business registered or incorporated?

- Registered
- Incorporated
- None of the above **[THANK & TERMINATE]**

3. Is your company any of the following?

	Yes	No
a) A corporate chain or franchise?	<input type="checkbox"/>	<input type="checkbox"/>
b) A registered charity?	<input type="checkbox"/>	<input type="checkbox"/>
c) A multi-level marketing company?	<input type="checkbox"/>	<input type="checkbox"/>
d) A real estate brokerage?	<input type="checkbox"/>	<input type="checkbox"/>

[IF YES TO ANY OF THE ABOVE, THANK & TERMINATE]

4. Approximately how many full-time equivalent staff (FTE) does your company currently employ in Canada? **(RECORD ACTUAL NUMBER)**

_____ Full-time equivalent staff

- 1 to 4 **[MICRO BUSINESS – SEGMENT 1]**
- 5 to 40 **[SMALL BUSINESS – SEGMENT 1]**
- 41 to 99 **[“LARGE” SMALL BUSINESS – SEGMENT 2]**
- 100 to 499 **[MEDIUM BUSINESS – SEGMENT 2]**
- More Than 500 **[THANK & TERMINATE]**

5. Using a scale from 0 to 10, where 10 means it is a significant priority, to what extent would you say the following activities are a priority for your company over the next 3 years?
- a) to start up a new business
 - b) to scale up your business
 - c) to export your products and services?

Not a priority at all											Significant priority
0	1	2	3	4	5	6	7	8	9	10	

IF ALL ITEMS IN Q5<7, THANK AND TERMINATE

6. In which province/territory do you live in?

RECORD _____

7. What is your gender? [If you do not feel comfortable disclosing, you do not need to do so] **[DO NOT READ LIST]**

- Male 1
- Female 2
- Prefer to self-describe, please specify: _____ 3
- Prefer not to answer 4

AIM FOR 50/50 SPLIT OF MALE AND FEMALE, WHILE RECRUITING OTHER GENDER IDENTITIES AS THEY FALL

8. Are you one of the individuals who founded this company?

- Yes **[ENTREPRENEURS]**
- No

IF RESPONDENT IS ONE OF THE FOUNDERS AND A WOMAN, FLAG AS "WOMAN ENTREPRENEUR"

9. Please let me know if you fall into any of the following categories:

	Yes	No
a) Do you identify as a person with a disability? A person with a disability is a person who has a long-term or recurring impairment such as vision, hearing, mobility or mental health-related which limits their daily activities inside or outside the home.	<input type="checkbox"/>	<input type="checkbox"/>
b) Do you identify as an Indigenous person that is, First Nations, Métis or Inuk (Inuit)? First Nations includes Status and Non-Status Indians.	<input type="checkbox"/>	<input type="checkbox"/>
c) [ASK ONLY IF "b"=NO] Do you identify as a member of a racialized community?	<input type="checkbox"/>	<input type="checkbox"/>
d) Do you identify as a member of the 2SLGBTQIA+ (Two-Spirit, Lesbian, Gay, Bisexual, Transgender, Queer and/or Questioning, Intersex, Asexual) community?	<input type="checkbox"/>	<input type="checkbox"/>

- IF YES AT Q9A – RECRUIT AS ENTREPRENEUR / BUSINESS OPERATOR / DECISION-MAKER **WITH A DISABILITY**
- IF YES AT Q9B - RECRUIT AS **INDIGENOUS** COMMUNITY ENTREPRENEUR / BUSINESS OPERATOR / DECISION-MAKER
- IF YES AT Q9C - RECRUIT AS **ETHNIC COMMUNITY** ENTREPRENEUR / BUSINESS OPERATOR / DECISION-MAKER
- IF YES AT Q9D - RECRUIT AS **2SLGBTQIA+ COMMUNITY** ENTREPRENEUR / BUSINESS OPERATOR / DECISION-MAKER

10. **[ASK ONLY IF Q9c=YES]** What is your ethnic background?

RECORD ETHNICITY: _____

11. Of Canada's two official languages, English and French, which one do you use most often at home?

- English
- French
- English and French equally (volunteered)
- Other (volunteered)

- IF RESPONDENT IS IN QUEBEC AND SELECTS "ENGLISH", RECRUIT AS **OLMC** ENTREPRENEUR / BUSINESS OPERATOR / DECISION-MAKER
- IF RESPONDENT IS IN A PROVINCE OR TERRITORY OTHER THAN QUEBEC OR NEW BRUNSWICK AND SELECTS "FRENCH" OR "BOTH EQUALLY", RECRUIT AS **OLMC** ENTREPRENEUR / BUSINESS OPERATOR / DECISION-MAKER

12. Is your business located in... **[READ LIST]**

A city or metropolitan area with a population of at least 100,000	1
A city with a population of 30,000 to 100,000	2
A city or town with a population of 10,000 to 30,000	3
A town or rural area with a population under 10,000	4

**ON A BEST EFFORT BASIS, FOR EACH GROUP, RECRUIT A MIX OF BUSINESSES
LOCATIONS**

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

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

ALL SECTORS CAN BE REPRESENTED IN BOTH SEGMENTS

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

15. Participants in discussion groups or interviews are asked to voice their opinions and thoughts, how comfortable are you in voicing your opinions in front of others? Are you... **READ OPTIONS**

- Very comfortable **MIN 4 PER GROUP**
- Fairly comfortable
- Not very comfortable **TERMINATE**
- Not at all comfortable **TERMINATE**

16. Have you ever attended a discussion group or interview on any topic that was arranged in advance and for which you received money for your participation?

- Yes **MAXIMUM 4 PER GROUP**
- No **GO TO INVITATION**

17. When did you last attend one of these discussion groups or interviews?

- Within the last 6 months **TERMINATE**
- Over 6 months ago

18. How many discussion groups or interviews have you attended in the past 5 years?

- Fewer than 5
- 5 or more **TERMINATE**

C. Online Focus Group Invitation

I would like to invite you to participate in an online focus group discussion with a senior research consultant from a Canadian public opinion research company, Quorus Consulting. The session for businesses in your region is scheduled take place on [DAY OF WEEK], [DATE], at [TIME]. It will last one and a half hours (90 minutes). People who attend will receive \$250 to thank them for their time. We will get this to you either by email transfer or by mailing you a check at the conclusion of the session.

Would you be willing to attend?

- Yes
- No **TERMINATE**

The session will be audio recorded for research purposes and representatives of the Government of Canada research team may be on the line as remote observers. You will be asked to acknowledge that you will be audio recorded during the session. The recordings will be used only by the Quorus Consulting research team and will not be shared with others. As I mentioned, all information collected in the group discussion will remain anonymous and be used for research purposes only in accordance with laws designed to protect your privacy.

To conduct the session, we will be using a video conferencing application so that you can see material that the moderator will want to show the group. We will need to send you the instructions to connect by email. The use of a computer is necessary since the moderator will want to show material to participants to get their reactions – that will be an important part of the discussion. **You can use a tablet if you so choose however you cannot use a smartphone to participate in this discussion since the screen size is too small.**

IF ASKED: You will be asked to use a webcam to participate so please be sure that the device you use has a properly functioning microphone and webcam.

Over the coming days we will be sending you an email with the web link to connect to the online session as well as the date and time of the session. We recommend that you click on the link we will send you a few days prior to your session to make sure you can access the online meeting that has been setup and repeat these steps at least 10 to 15 minutes prior to your session.

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 participate, please call so that

we may get someone to replace you – you cannot choose your own replacement if you cannot attend. You can reach us at **1-800-XXX-XXXX** at our office. Please ask for **[recruiter to provide]**. Someone will call you the day before to remind you about the discussion.

So that we can send you the email with the logistics, call you to remind you about the session or contact you should there be any changes, can you please confirm your name and contact information for me?

First name _____

Last Name _____

Email _____

Day time phone number _____

Night time phone number _____

Thank you very much for your help!

D. Tele-Web Interview Invitation

I would like to invite you to participate in a web-assisted telephone interview with a senior research consultant from a Canadian public opinion research company, Quorus Consulting. We would like to schedule the interview with you between **DATE START** and **DATE END** at a time that works best for you. Would you have time on **[INSERT DATE AND TIME OPTIONS]**? It will last roughly 45 minutes, depending on how much feedback you provide. People who participate will receive \$250 to thank them for their time – we will get this to you either by email transfer or by mailing you a check at the conclusion of the interview.

SCHEDULE INTERVIEW THAT FITS RESPONDENT AND INTERVIEWER SCHEDULES

The session will be audio recorded for research purposes and representatives of the Government of Canada research team may be on the line as remote observers. You will be asked to acknowledge that you will be audio recorded during the session. The recordings will be used only by the Quorus Consulting research team and will not be shared with others. As I mentioned, all information collected in the interview will remain anonymous and be used for research purposes only in accordance with laws designed to protect your privacy.

To conduct the session, we will be using a video conferencing application so that you can see material that the moderator will want to show you. We will need to send you the instructions to connect by email. The use of a computer is necessary since the moderator will want to show you material to get your reactions – that will be an important part of the discussion. **You can use a tablet if you so choose however you cannot use a smartphone to participate in this discussion since the screen size is too small.**

IF ASKED: You will be asked to use a webcam to participate so please be sure that the device you use has a properly functioning microphone and webcam.

Over the coming days we will be sending you an email with the conference call logistics with the specific telephone number you will need to dial, the participant passcode, a web link to connect to the online session as well as the date and time of the call. There will also be contact information in the email in case you need to change the date or time of the interview.

We recommend that you click on the link we will send you a few days prior to your session to make sure you can access the online meeting that has been setup and repeat these steps at least 10 to 15 minutes prior to your session.

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 participate, please call so that we may get someone to replace you – you cannot choose your own replacement if you cannot attend. You can reach us at **1-800-XXX-XXXX** at our office. Please ask for **[recruiter to provide]**. Someone will call you the day before to remind you about the discussion.

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

First name _____

Last Name _____

Email _____

Day time phone number _____

Night time phone number _____

Thank you very much for your help!

Appendix B: Moderation guide – focus groups

Focus Group Moderation Guide for Small and Medium Business Enterprise (SME) Owners and Directors

[NOTE: This script has been designed for focus groups. It will be adapted by the moderator for one-on-one interviews as needed.]

A. Introduction (12 minutes)

- Introduce moderator and that they work with Quorus Consulting, and they are conducting this research on behalf of the Government of Canada.
- Thanks for attending/value you being here
- Explain general purpose of focus group discussions:
 - Gauge *opinions* about issues/ideas/products
 - Not a knowledge test; no right or wrong answers (interested in opinions)
 - Today's session will last approximately 90 minutes.
 - Okay to disagree; want people to speak up if hold different view.
 - Do not need to direct all comments to me; can exchange ideas with each other
 - Please note that anything you say during these groups will be held in the strictest confidence. We do not attribute comments to specific people. Our report summarizes the findings from the groups but does not mention anyone by name. Please do not provide any identifiable information about yourself.
 - The session is being audio-video recorded for report writing purposes / verify feedback. These recordings are stored for up to 6 months and then destroyed.
 - If you have a cell phone, please turn it off.
 - To participate in this session, please make sure your webcam and your microphone are on and that you can hear me clearly. If you are not

speaking, I would encourage you to mute your line to keep background noise to a minimum...just remember to remove yourself from mute when you want to speak!

- I will be sharing my screen to show you some things during tonight's session.
- We will be making regular use of the chat function. To access that feature, please scroll over the bottom of your screen until the command bar appears. There you will see a function called "chat". It will open a chat screen on the far right of your screen. I'd like to ask you to use chat throughout our discussion tonight. Let's do a quick test right now - please open the chat window and send the group a short message (e.g., Hello everyone). If you have an answer to a question and I don't get to ask you specifically, please type your response in there. We will be reviewing all chat comments at the completion of this project.
- The final report for this session, and others, can be accessed through the Library of Parliament or Library and Archives Canada once it's posted.
- Your responses will in no way affect your dealings with the Government of Canada.
- Individuals from ISED directly involved in this project are watching this session and this is only so they can hear the comments first-hand.

Please note that I am not an employee of the Government of Canada and may not be able to answer questions about what we will be discussing. If questions do come up over the course of the group, we will try to get answers for you before we wrap up the session. Any questions?

So, let's go around the table and have everyone introduce themselves...I'll be curious to know the following:

- What is your role or your position?
- What type of business do you own/operate/manage?
- For those with employees, how many employees do you have in Canada; if you are a micro business, how many contractors or casual employees do you have?
- How many years have you been in business?

B. Current challenges and priorities / Awareness of GC programming (12 minutes)

Over the years, my conversations with business decision-makers have led me to conclude that there are always challenges. While these challenges might change over time, the one constant is that, for most businesses, they are always faced with some sort of main challenge.

- Tell us about the main challenges your business is facing these days.

- In your view, what should the Government of Canada prioritize in the short term (now and over the 1 to 2 years) when it comes to supporting businesses like yours or your industry in general?
 - ...and what should they prioritize in the longer term, so a 2 to 5-year horizon?

- By a quick show of hands, how many of you are aware of current federal programs designed to help support small and medium businesses?
 - Can you give me examples of programs or services you are **aware** of?
 - Can you give examples of programs you **have recently accessed or applied to** that address your challenges, that is, that are relevant to your business now?

- What areas of support are you most interested in exploring/implementing for your company?

IF NEEDED: ...programs to support start-ups, upscaling or accelerated growth, exporting, digital adoption, innovation, green technologies/clean growth, tax incentives, funding, etc.

- Do you feel better knowledge of available programming would benefit your business?
 - Why/Why not?

- What are your preferred ways to find out about business supports from the federal government (i.e., online, mobile/app, phone, email, social media, other)? Are there particular sites you prefer (e.g., LinkedIn, Facebook, YouTube, association sites, traditional media, etc.)?

C. General Concept Evaluation (55 minutes)

Let's turn our attention to some advertising concepts.

In a nutshell: the Government of Canada will be conducting a national advertising campaign to improve awareness of programs it offers to support businesses. The goal is to make these resources easily accessible to businesses, enabling them to take advantage of available supports so they can better navigate the current economic environment all in one place.

I have three advertising concepts that have been proposed for this campaign to which I'd like to get your reactions.

A few things you need to keep in mind – these are all draft concepts, so I'll be eager to get your honest feedback around these ideas. I'd like you to focus on the general ideas behind the ad, the messages that they are trying to get across and the way they are trying to get this through to you.

I'll be showing you three different approaches to support this campaign objective. Each campaign concept that I'll be showing you includes:

- Animated **story boards for a short, 15 second video**, which could appear on webpages you visit or on social media. The voiceover and music you will hear in some of these concepts are placeholders for our testing today. The selection of the final music and voice over will be completed once we have a final concept selected.
- **A matched static ad** -- designed to complement the video and which would appear on webpages you visit or on social media, including business pages.
- Some of the concepts have two different presentations or treatments of the same material. I will be sure to highlight this to you as we go through the three concepts. Where there are different presentations, the GC is looking to understand why one treatment or presentation works better than another and your feedback will support the messaging and images used in the final versions of the winning concept.

So, let's get started. I am going to be sharing some images with you on the screen. We ask that you do not record or take screen shots or otherwise share this content in any way.

FOR INTERNAL USE ONLY:

Randomize concepts for each group as follows:

Group 1:	1	2	3
Group 2:	2	3	1
Group 3:	3	1	2
Group 4:	1	3	2
Group 5:	2	1	3
Group 6:	3	2	1
Group 7:	1	2	3
Group 8:	2	3	1
Group 9:	3	1	2

CREATIVE CONCEPT 1: UNCOMPLICATED

**PRESENTATION 1A: UNCOMPLICATED - MAGIC BALL
PRESENTATION 1A ANIMATIC VIDEO + 1A STATIC AD**

**PRESENTATION 1B: UNCOMPLICATED: BBF TOOL
PRESENTATION 1B STORYBOARD VIDEO + 1B STATIC AD x2
PRESENTATIONS, EACH WITH 2 EXECUTIONS**

CREATIVE CONCEPT 2: DON'T PROBLEM SOLVE ALONE

**1 ANIMATIC VIDEO + 1 STATIC ADS + TWO PRESENTATION
(SLEEPLESS MAN/WORRIED WOMAN) Note - WANT TO ENSURE
BOTH WORK**

CREATIVE CONCEPT 3: AT YOUR FINGERTIPS

**1 ANIMATIC VIDEO + 1 STATIC ADS X 2 PRESENTATIONS
(FUNDING/SIMPLE SOLUTION EXECUTIONS)**

Let's start with Concept 1/2/3.

[MODERATOR TO SHOW ALL ELEMENTS OF EACH CONCEPT ONE AT A TIME AND ASK FOR A VOTE, INCLUDING THE PRESENTATION OF VARIATIONS ATTACHED TO EACH, GATHER INDIVIDUAL RATINGS NOTED IN SCRIPTS STARTING ON PAGE 7]

[FOR GENERAL DISCUSSION, MODERATOR TO SHOW A SCREEN THAT FEATURES THE MAIN ELEMENTS OF EACH CONCEPT WITH THEIR ASSOCIATED NUMBER AND VARIATIONS (PRESENTATION A, PRESENTATION B) – VISUALS SELECTED WILL SHOW FRAMES FROM THE VIDEO AND/OR STATIC AD AS NEEDED FOR EACH CONCEPT AS VISUAL CUES FOR PARTICIPANTS]

MAIN MESSAGE, CREATIVE AND CALL TO ACTION PROBES APPLIED TO DISCUSSION FOR ALL CONCEPTS SHOWN:

- What were your overall reactions to this ad campaign? Help me understand those reactions...
- What were your first impressions: Tell me, what did you like about this ad campaign? Now tell me what you did not like.

MAIN MESSAGE VERBAL PROBES

- What is the main message in this concept, what were they trying to say to you?
- Is the main message...
 - Clear? Why/why not?
 - New information for you? How so?
 - Helpful or relevant for you? Why / why not?
 - Persuasive? Why / why not?
 - Memorable? Why/why not?
 - Credible? Why/why not?
- Was it clear to you that this was a Government of Canada ad?

CREATIVE VERBAL PROBES

- What did you think of the creative idea they are planning to use to get this message across to you? **PROBE:**
 - Describe it to me in your own words.
 - How would you describe the tone of it? Positive; negative; upbeat; realistic? Is this appropriate given the message?
 - Do you see your business in this creative treatment – do you see yourself as the intended audience?

- Likes/Dislikes
- Attention grabbing/unique – specific visuals, specific message on screen or in the script, etc.? What was your eye drawn to?

CALL TO ACTION PROBES

- What are they trying to get you to do or think? Would you? Why / why not?
- If you were to follow-up, is it clear what the next steps are?
- Would you visit the website after seeing this ad? Why / why not?
 - Did the concept do enough to persuade you that there is useful information on the site for business owners/operators like yourself? How so?

GENERAL DISCUSSION (SEE PROBES): Concept 1A and Concept 1B

VOTING: Concept 1 (Uncomplicated): 2 DISTINCT PRESENTATIONS (1A AND 1B)

- **Vote: Concept 1, Presentation A:**
 - What elements (colour, graphics, relatable, text, images, tone) worked for you?
 - Was there anything that stood out to you in the video or static ad? What grabbed your attention in this ad? Would you click through?
 - For those who don't like Concept 1, Presentation A, could you tell us why?
- **Vote: For Concept 1, Presentation B:**
 - What elements (colour, graphics, relatable, text, images, tone) worked for you?
 - Which of the static ad presentations did you prefer? **Forced Choice2:** If you had to choose a static digital ad between the 2 presented for Concept 1, Presentation B, which would you choose?
 - Presentation **Fill in the Blank** (Option 1: 2 variations) OR **Simplified Way/Blank filled in** (Option 2: 2 variations). (All vote)

GENERAL DISCUSSION (SEE PROBES): Concept 3

VOTING: CONCEPT 3: AT YOUR FINGERTIPS

- **1 ANIMATIC VIDEO, 1 STATIC AD, TWO PRESENTATIONS [CLIENT WANTS TO ENSURE BOTH PRESENTATIONS WORK, WOULD USE BOTH IF THIS CONCEPT IS SELECTED.]**
 - What elements (colour, graphics, relatable, text, images, tone) worked for you?
 - Did both presentations of the digital ad work for you: **Presentation A: Solutions focus; Presentation B: Access to hundreds of programs focus?** Why/why not?
 - For those who don't like Concept 3, could you tell us why?

REVIEW OF ALL CONCEPTS AND FINAL VOTE

[MODERATOR TO SHOW A SCREEN THAT FEATURES FOUR CONCEPTS WITH THEIR ASSOCIATED NUMBERS AND VARIATIONS (PRESENTATION A, PRESENTATION B) – VISUALS SELECTED WILL SHOW FRAMES FROM THE VIDEO AND/OR STATIC AD AS NEEDED FOR EACH CONCEPT AS VISUAL CUES FOR PARTICIPANTS]

- What were your overall reactions to this ad campaign? Help me understand those reactions...
- What were your first impressions: Tell me, what did you like about this ad campaign? Now tell me what you did not like.
- Of the four concepts, which one do you prefer and why? I need everyone to submit an answer on this.
 - **Concept 1A**
 - **Concept 1B**
 - **Concept 2**
 - **Concept 3**

- Which ad concept is most effective at generating awareness that the government offers easy access to a wide variety (hundreds) of programs and services to help SMEs address their business needs.

That's it for the voting:

- Is there anything that could be done to improve the way the information is presented in your preferred ad concept? What specifically would you suggest and why is that?

EXPLORING EXPECTATIONS SET BY ADVERTISING/BUSINESS SUPPORTS WEB PAGE (10 MINUTES)

Now that you've seen the advertising concepts...

- What expectations do you have of the website and the programs it provides access to?
- What would you expect to find on the website?

MODERATOR SHOWS THE BUSINESS SUPPORTS WEB PAGE. EXPLAINS THE TOP BANNER WILL REPEAT THE MAIN ELEMENTS OF THE WINNING CONCEPT BASED ON THEIR FEEDBACK

AFTER GATHERING FEEDBACK, MODERATOR DESCRIBES OBJECTIVE OF WEBPAGE: "to help you be aware of and stay up-to-date on the different options available, all in one place."

THEN EXPLAINS THAT THE WEBPAGE GROUPS EVERYTHING AVAILABLE TO SMALL AND MEDIUM BUSINESSES VIA TWO TOOLS:

1. AN INTERACTIVE TOOL AVAILABLE ON THE WEB CALLED "THE BUSINESS BENEFITS FINDER", AND,
2. A MOBILE APP CALLED THE "CANADA BUSINESS APP"

THE SITE THEN FEATURES TWO SUPPORTING RESOURCES:

1. ADVISOR SERVICES, VIA PHONE, AND,
2. UPDATES/INFORMATION AVAILABLE THROUGH AN EMAIL NEWSLETTER

- Is this something you would use to investigate supports for your business?
 - Is there anything here you would expect to see that is missing for you?
 - Is there anything here that you find unclear?
 - Would you be interested enough to click through – where would you start?
- What would you search (e.g., in Google) to find this website again?

D. THANK AND CLOSE (1 minute)

[MODERATOR CHECKS WITH CLIENT FOR TEAM REGARDING ANY NEW QUESTIONS / CLARIFICATIONS NEEDED]

In parting, is there anything that you think I should have asked but I didn't?

Thanks again! The team that invited you to participate in this session will contact you regarding the manner in which you can receive the incentive we promised you.

Have a great evening.

Appendix C: Questionnaire – Pre-ACET

ADVERTISING CAMPAIGN EVALUATION TOOL
Innovation, Science and Economic Development Canada
Baseline Pre-Campaign Questionnaire – Quorus

INTRODUCTION

Welcome and thank you for your participation in this study. Quorus Consulting Group has been hired to administer an online survey on behalf of the Government of Canada on current issues of interest to Canadians. Si vous préférez répondre au sondage en français, veuillez cliquer sur [français](#) **[SWITCH TO FRENCH VERSION]**.

Your participation is voluntary, and your responses will be kept entirely confidential and anonymous. The information provided will be managed according to the requirements of the Privacy Act, the Access to Information Act, and any other pertinent legislation. The survey takes about 10-15 minutes to complete. You may opt-out of the survey at any time.

The survey is best completed on a computer or a tablet. If you are completing this survey on a smart phone, please turn the device to landscape (horizontal/sideways) mode so that all questions display correctly.

Click [here](#) if you want to verify the authenticity of this survey and [here](#) to read our privacy policy.

Please contact XYZ for technical assistance.

[START SURVEY](#)

If you require any assistance, please contact XXX.

S1. Are you currently the owner, partner or senior manager in a Canadian business of any size, who influences the overall direction of the company?

01 - Yes, Owner/ Partner

02 - Yes, Senior Manager (e.g., C-level, director of marketing/digital/sales or a similar position)

03 - No, none of the above **TERMINATE**

S2. Is any one of the following your company's primary business line? (select all that apply)

- | | |
|------------------------|------------------|
| 01 - Media | TERMINATE |
| 02 - Advertising | TERMINATE |
| 03 - Marketing | TERMINATE |
| 04 - Public relations | TERMINATE |
| 05 - Market research | TERMINATE |
| 06 - Government | TERMINATE |
| 07 - None of the above | |

S3. Including yourself, approximately how many full-time staff does the company you own or work for, employ in Canada?

- | | |
|------------------|------------------------------|
| 01 - 1 | QUALIFIES AS "MICRO" |
| 02 - 2-4 | QUALIFIES AS "MICRO" |
| 03 - 5-24 | QUALIFIES AS "SMALL" |
| 04 - 25-49 | QUALIFIES AS "SMALL" |
| 05 - 50-99 | QUALIFIES AS "SMALL" |
| 06 - 100-249 | QUALIFIES AS "MEDIUM" |
| 07 - 250-499 | QUALIFIES AS "MEDIUM" |
| 08 - 500 or more | TERMINATE |

S4. In which province or territory is your business based?

- 01 - Alberta
- 02 - British Columbia
- 03 - Manitoba
- 04 - New Brunswick
- 05 - Newfoundland and Labrador
- 06 - Northwest Territories
- 07 - Nova Scotia
- 08 - Nunavut
- 09 - Ontario
- 10 - Prince Edward Island
- 11 - Quebec
- 12 - Saskatchewan
- 13 - Yukon
- 14 - My business is not based in Canada **TERMINATE**

S5. In which of the following age categories do you belong?

01 - less than 18 years old **TERMINATE**

02 - 18 to 24

03 - 25 to 34

04 - 35 to 44

05 - 45 to 54

06 - 55 to 64

07 - 65 or older

S6. Are you...

01 - Male

02 - Female

03 - Prefer to self-describe, please specify: _____

99 - Prefer not to say

S7. Is your business based in a ...

01 - Urban area

02 - Suburban area

03 - Small community

04 - Rural area

05 - Northern/Remote area

99 - Don't know/prefer not to say

S8. Which of the following industry sectors best describes your company's main business? **SELECT ONE CATEGORY**

- 01 - Agriculture, forestry, fishing and hunting
- 02 - Mining, quarrying, and oil and gas extraction
- 03 - Utilities
- 04 - Construction
- 05 - Manufacturing
- 06 - Wholesale trade
- 07 - Retail trade
- 08 - Transportation and warehousing
- 09 - Information and cultural industries
- 10 - Finance and insurance
- 11 - Real estate and rental and leasing
- 12 - Professional, scientific and technical services
- 13 - Management of companies and enterprises
- 14 - Administrative and support, waste management and remediation services
- 15 - Educational services
- 16 - Health care and social assistance
- 17 - Arts, entertainment and recreation
- 18 - Accommodation, food services and tourism
- 19 - Public administration
- 98 - Other, please specify: _____

CORE ACET TRACKING QUESTIONS - GENERAL

ASK ALL RESPONDENTS

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

01 - Yes

02 - No

SKIP TO Q3

IF YES TO Q1, ASK Q2

2. Think about the most recent Government of Canada advertisement that comes to mind. What do you remember about this ad?

(open end)

99 - Don't remember

CAMPAIGN SPECIFIC ACET QUESTIONS – UNAIDED

3. Over the past three weeks, have you read or heard any Government of Canada advertisements that highlight easy access to hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs?

01 - Yes

02 - No

SKIP TO Q6

IF YES TO Q3, ASK Q4 AND Q5)

4. Where did you see, read or hear this Government of Canada advertisement that highlighted easy access to hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs?

RANDOMIZE...SELECT ALL THAT APPLY

01 - Website

02 - Magazines

03 - Newspaper (online)

04 - Billboards

05 - Digital Billboards

06 - Radio

07 - X (formerly known as Twitter)

08 - YouTube

09 - LinkedIn

10 - Spotify

11 - Google

12 - Bing

13 - Television

14 - Newspapers (Print)

15 - Reddit

16 - TikTok

98 - Other, please specify _____ **ANCHOR**

99 - Don't remember **ANCHOR / EXCLUSIVE**

5. What do you remember about this ad?

(open end)

99 - Don't remember

8. To what extent do you agree or disagree with each of the following statements.

RANDOMIZE...CAROUSEL

- 01 - Strongly agree
- 02 - Somewhat agree
- 03 - Neither agree nor disagree
- 04 - Somewhat disagree
- 05 - Strongly disagree
- 99 - Don't know/Prefer not to say

- a. The Government of Canada understands the challenges facing Canadian businesses
- b. The Government of Canada offers a wide variety of programs to support Canadian businesses
- c. The Government of Canada has programs that support Canada's small and medium sized businesses to develop or find customers outside Canada
- d. The Government of Canada has programs that support Canada's small and medium sized businesses to scale up
- e. The Government of Canada has programs that support Canada's small and medium sized businesses to start-up a new business
- f. The Government of Canada has programs that support Canada's small and medium sized businesses to develop their research and development capabilities and network
- g. The Government of Canada has programs that support Canada's small and medium sized businesses through wage subsidies
- h. The Government of Canada has programs that support Canada's small and medium sized businesses through tax credits
- i. The Government of Canada has programs that support Canada's small and medium sized businesses through business loans
- j. The Government of Canada has programs that support Canada's small and medium sized businesses through access to funding

9. The Government of Canada has identified several priorities to support businesses in Canada. On a scale of 1 to 5, how important are each of the following for your business.

RANDOMIZE...CAROUSEL

01 – Not at all important

02

03

04

05 – Very important

99 – Don't know/prefer not to say

- a. Encouraging Canadian businesses to innovate
- b. Investing in infrastructure to move goods more efficiently
- c. Promoting and maintaining fair competition in the market
- d. Helping businesses access financing
- e. Investing in domestic manufacturing
- f. Improving access to high-speed internet for all Canadians
- g. Promoting incentives that encourage businesses to invest in green technology
- h. Helping businesses adopt digital technologies
- i. Helping businesses access new markets
- j. Supporting regional economic development
- k. Having a competitive business tax regime
- l. Helping businesses protect and use their intellectual property for commercial success
- m. Helping businesses to scale up
- n. Improving the government's online service experience for business

10. On a scale of 1 to 5, how would you rate the performance of the Government of Canada in each of these same areas.

01 – Very poor

02

03

04

05 – Very good

99 - Don't know

- a. Encouraging Canadian businesses to innovate
- b. Investing in infrastructure to move goods more efficiently
- c. Promoting and maintaining fair competition in the market
- d. Helping businesses access financing
- e. Investing in domestic manufacturing
- f. Improving access to high-speed internet for all Canadians
- g. Promoting incentives that encourage businesses to invest in green technology
- h. Helping businesses adopt digital technologies
- i. Helping businesses access new markets
- j. Supporting regional economic development
- k. Having a competitive business tax regime
- l. Helping businesses protect and use their intellectual property for commercial success
- m. Helping businesses to scale up
- n. Improving the government's online service experience for business

11. How familiar are you with each of the following Government of Canada programs designed to support Canadian businesses. If you have never heard of a particular program, feel free to select “not at all familiar”.

RANDOMIZE...CAROUSEL

01 - Not at familiar, never heard of it

02 - Not very familiar, but have heard of it

03 - A little familiar

04 - Somewhat familiar

05 - Very familiar

- a. Accelerated Growth Service
- b. Biomanufacturing
- c. Black Entrepreneurship Program
- d. Canada Small Business Financing Program
- e. Clean Growth Hub
- f. CyberSecure Canada
- g. Innovation Superclusters Initiative
- h. Innovative Solutions Canada
- i. Intellectual Property Strategy
- j. Regional Economic Growth through Innovation
- k. Strategic Innovation Fund
- l. Venture Capital Catalyst Initiative
- m. The 50 – 30 Challenge
- n. The Canada Business App
- o. Women Entrepreneurship Strategy
- p. The Business Benefits Finder Website
- q. GC Business Insights Newsletter
- r. Canadian Digital Adoption Program

ASK ALL

12. Is your organization over 50% owned by person(s) who self-identify as any of the following:

SELECT ALL THAT APPLY

- 01 - Indigenous person(s) including First Nations, Inuit and Métis
- 02 - Black persons and/or person(s) of African decent
- 03 - Member(s) of another racialized community
- 04 - Member(s) of the 2SLGBTQIA+ community
- 05 - Person(s) living with a disability
- 06 - Women
- 07 - Persons younger than 40 years old
- 08 - Recent immigrant(s) to Canada (i.e., landed in Canada in the last 5 years)
- 09 - None of the above
- 99 - Don't know / Prefer not to say

13. Do you identify with any of the groups below? **SELECT ALL THAT APPLY**

- 01 - Indigenous person, including First Nations, Inuk or Métis
- 02 - Black person and/or person of African decent
- 03 - Member of another racialized community
- 04 - 2SLGBTQIA+ Person
- 05 - Person living with a disability
- 06 - Woman
- 07 - Under 40 years of age
- 08 - Recent immigrant to Canada (i.e., landed in Canada in the last 5 years)
- 09 - None of the above
- 99 - Prefer not to say

That concludes the survey. This survey was conducted on behalf of [Innovation, Science and Economic Development](#).

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

Appendix D: Questionnaire – Post-ACET

ADVERTISING CAMPAIGN EVALUATION TOOL
Innovation, Science and Economic Development Canada
Baseline Post-Campaign Questionnaire – Quorus

INTRODUCTION

Welcome and thank you for your participation in this study. Quorus Consulting Group has been hired to administer an online survey on behalf of the Government of Canada on current issues of interest to Canadians. Si vous préférez répondre au sondage en français, veuillez cliquer sur [français](#) **[SWITCH TO FRENCH VERSION]**.

Your participation is voluntary, and your responses will be kept entirely confidential and anonymous. The information provided will be managed according to the requirements of the Privacy Act, the Access to Information Act, and any other pertinent legislation. The survey takes about 15 minutes to complete. You may opt-out of the survey at any time.

The survey is best completed on a computer or a tablet. If you are completing this survey on a smart phone, please turn the device to landscape (horizontal/sideways) mode so that all questions display correctly.

Click [here](#) if you want to verify the authenticity of this survey and [here](#) to read our privacy policy.

Please contact XYZ for technical assistance.

[START SURVEY](#)

If you require any assistance, please contact XXX.

S1. Are you currently the owner, partner or senior manager in a Canadian business of any size, who influences the overall direction of the company?

01 - Yes, Owner/ Partner

02 - Yes, Senior Manager (e.g., C-level, director of marketing/digital/sales or a similar position)

03 - No, none of the above **TERMINATE**

S2. Is any one of the following your company's primary business line? (select all that apply)

- | | |
|------------------------|------------------|
| 01 - Media | TERMINATE |
| 02 - Advertising | TERMINATE |
| 03 - Marketing | TERMINATE |
| 04 - Public relations | TERMINATE |
| 05 - Market research | TERMINATE |
| 06 - Government | TERMINATE |
| 07 - None of the above | |

S3. Including yourself, approximately how many full-time staff does the company you own or work for, employ in Canada?

- | | |
|------------------|------------------------------|
| 01 - 1 | QUALIFIES AS "MICRO" |
| 02 - 2-4 | QUALIFIES AS "MICRO" |
| 03 - 5-24 | QUALIFIES AS "SMALL" |
| 04 - 25-49 | QUALIFIES AS "SMALL" |
| 05 - 50-99 | QUALIFIES AS "SMALL" |
| 06 - 100-249 | QUALIFIES AS "MEDIUM" |
| 07 - 250-499 | QUALIFIES AS "MEDIUM" |
| 08 - 500 or more | TERMINATE |

S4. In which province or territory is your business based?

- 01 - Alberta
- 02 - British Columbia
- 03 - Manitoba
- 04 - New Brunswick
- 05 - Newfoundland and Labrador
- 06 - Northwest Territories
- 07 - Nova Scotia
- 08 - Nunavut
- 09 - Ontario
- 10 - Prince Edward Island
- 11 - Quebec
- 12 - Saskatchewan
- 13 - Yukon
- 14 - My business is not based in Canada **TERMINATE**

S5. In which of the following age categories do you belong?

01 - less than 18 years old **TERMINATE**

02 - 18 to 24

03 - 25 to 34

04 - 35 to 44

05 - 45 to 54

06 - 55 to 64

07 - 65 or older

S6. Are you...

01 - Male

02 - Female

03 - Prefer to self-describe, please specify: _____

99 - Prefer not to say

S7. Is your business based in a ...

01 - Urban area

02 - Suburban area

03 - Small community

04 - Rural area

05 - Northern/Remote area

99 - Don't know/prefer not to say

S8. Which of the following industry sectors best describes your company's main business? **SELECT ONE CATEGORY**

- 01 - Agriculture, forestry, fishing and hunting
- 02 - Mining, quarrying, and oil and gas extraction
- 03 - Utilities
- 04 - Construction
- 05 - Manufacturing
- 06 - Wholesale trade
- 07 - Retail trade
- 08 - Transportation and warehousing
- 09 - Information and cultural industries
- 10 - Finance and insurance
- 11 - Real estate and rental and leasing
- 12 - Professional, scientific and technical services
- 13 - Management of companies and enterprises
- 14 - Administrative and support, waste management and remediation services
- 15 - Educational services
- 16 - Health care and social assistance
- 17 - Arts, entertainment and recreation
- 18 - Accommodation, food services and tourism
- 19 - Public administration
- 98 - Other, please specify: _____

CORE ACET TRACKING QUESTIONS - GENERAL

ASK ALL RESPONDENTS

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

01 - Yes

02 - No

SKIP TO Q3

IF YES TO Q1, ASK Q2

2. Think about the most recent Government of Canada advertisement that comes to mind. What do you remember about this ad?

(open end)

99 - Don't remember

CAMPAIGN SPECIFIC ACET QUESTIONS – UNAIDED

3. Over the past three weeks, have you seen, read or heard any Government of Canada advertisements that highlight easy access to hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs?

01 - Yes

02 - No

SKIP TO Q6

IF YES TO Q3, ASK Q4 AND Q5

4. Where have you seen, read or heard these Government of Canada advertisements that highlighted easy access to hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs?

RANDOMIZE...SELECT ALL THAT APPLY

01 - Website

02 - Magazines

03 - Online news sites

04 - Highway billboards

05 - Digital Billboards

06 - Radio

07 - X (formerly Twitter)

08 - YouTube

09 - LinkedIn

10 - Digital/Streaming radio (e.g., Spotify, Podcast)

11 - Google

12 - Web search (e.g., Bing)

13 - Television

14 - Newspapers (Print)

15 - Reddit

16 - TikTok

98 - Other, please specify _____

ANCHOR

99 - Don't remember

ANCHOR / EXCLUSIVE

8. To what extent do you agree or disagree with each of the following statements.

RANDOMIZE...CAROUSEL

- 01 - Strongly agree
- 02 - Somewhat agree
- 03 - Neither agree nor disagree
- 04 - Somewhat disagree
- 05 - Strongly disagree
- 99 - Don't know/Prefer not to say

- a. The Government of Canada **understands the challenges facing Canadian businesses**
- b. The Government of Canada offers a **wide variety of programs to support Canadian businesses**
- c. The Government of Canada has programs that support Canada's small and medium sized businesses to **develop or find customers outside Canada**
- d. The Government of Canada has programs that support Canada's small and medium sized businesses to **scale up**
- e. The Government of Canada has programs that support Canada's small and medium sized businesses to **start-up a new business**
- f. The Government of Canada has programs that support Canada's small and medium sized businesses to develop their **research and development capabilities and networks**
- g. The Government of Canada has programs that support Canada's small and medium sized businesses through **wage subsidies**
- h. The Government of Canada has programs that support Canada's small and medium sized businesses through **tax credits**
- i. The Government of Canada has programs that support Canada's small and medium sized businesses through **business loans**
- j. The Government of Canada has programs that support Canada's small and medium sized businesses through **access to funding**

9. The Government of Canada has identified several priorities to support businesses in Canada. On a scale of 1 to 5, **how important are each of the following** for your business.

RANDOMIZE...CAROUSEL

01 - Not at all important

02

03

04

05 - Very important

99 - Don't know/prefer not to say

- a. Encouraging Canadian businesses to innovate
- b. Investing in infrastructure to move goods more efficiently
- c. Promoting and maintaining fair competition in the market
- d. Helping businesses access financing
- e. Investing in domestic manufacturing
- f. Improving access to high-speed internet for all Canadians
- g. Promoting incentives that encourage businesses to invest in green technology
- h. Helping businesses adopt digital technologies
- i. Helping businesses access new markets
- j. Supporting regional economic development
- k. Having a competitive business tax regime
- l. Helping businesses protect and use their intellectual property for commercial success
- m. Helping businesses to scale up
- n. Improving the government's online service experience for business
- o. Team Canada (promoting Canada as a place to do business)

10. On a scale of 1 to 5, how would you **rate the performance** of the Government of Canada in each of these same areas.

01 - Very poor

02

03

04

05 - Very good

99 - Don't know

- a. Encouraging Canadian businesses to innovate
- b. Investing in infrastructure to move goods more efficiently
- c. Promoting and maintaining fair competition in the market
- d. Helping businesses access financing
- e. Investing in domestic manufacturing
- f. Improving access to high-speed internet for all Canadians
- g. Promoting incentives that encourage businesses to invest in green technology
- h. Helping businesses adopt digital technologies
- i. Helping businesses access new markets
- j. Supporting regional economic development
- k. Having a competitive business tax regime
- l. Helping businesses protect and use their intellectual property for commercial success
- m. Helping businesses to scale up
- n. Improving the government's online service experience for business
- o. Team Canada (promoting Canada as a place to do business)

11. How familiar are you with each of the following Government of Canada programs designed to support Canadian businesses. If you have never heard of a particular program, feel free to select “not at all familiar”.

RANDOMIZE...CAROUSEL

01 - Not at familiar, never heard of it

02 - Not very familiar, but have heard of it

03 - A little familiar

04 - Somewhat familiar

05 - Very familiar

- a. Accelerated Growth Service
- b. Biomanufacturing
- c. Black Entrepreneurship Program
- d. Canada Small Business Financing Program
- e. Clean Growth Hub
- f. CyberSecure Canada
- g. Global Innovation Clusters (previously known as the Innovation Superclusters Initiative)
- h. Innovative Solutions Canada
- i. Intellectual Property Strategy
- j. Regional Economic Growth through Innovation
- k. Strategic Innovation Fund
- l. Venture Capital Catalyst Initiative
- m. The 50 – 30 Challenge
- n. The Canada Business App
- o. Women Entrepreneurship Strategy
- p. The Business Benefits Finder
- q. GC Business Insights Newsletter
- r. Canada Digital Adoption Program

CORE ACET TRACKING QUESTIONS - GENERAL

Here are some ads that have recently been broadcast on various media. Click here to watch.

[INSERT VIDEO and PRINT ADS]

[CLICK TO GO TO THE NEXT PAGE]

T1H. Over the past few months, have you seen, read or heard any of these ads?

01 - Yes

02 - No **SKIP TO Q. T1J**

ASK ALL WHO SAW AD IN T1H

T1I. Where have you seen, read or heard these ads?

SELECT ALL THAT APPLY

01 - Website

02 - Magazines

03 - Online news sites

04 - Highway billboards

05 - Digital Billboards

06 - Radio

07 - X (formerly Twitter)

08 - YouTube

09 - LinkedIn

10 - Digital/Streaming radio (e.g. Spotify, Podcast)

12 - Web search (e.g. Google, Bing)

98 - Other, specify _____ **ANCHOR**

99 - Don't remember **ANCHOR / EXCLUSIVE**

ASK ALL

T1J. What do you think is the main point these ads are trying to get across?

[RECORD]

99 - Don't remember

T1K. On a scale of 1 to 5, please indicate your level of agreement with the following statements about these ads.

RANDOMIZE...CAROUSEL

- 01 - Strongly disagree
- 02 - Somewhat disagree
- 03 - Neither agree nor disagree
- 04 - Somewhat agree
- 05 - Strongly agree

- a. These ads catch my attention
- b. These ads are relevant to me
- c. These ads are difficult to follow
- d. These ads do not favour one political party over another
- e. These ads talk about an important topic
- f. These ads provide new information
- g. These ads clearly convey that the Government of Canada is helping businesses easily access hundreds of government programs and services designed to help micro, small and medium enterprises address their business needs

ASK ALL

12. Is your organization over 50% owned by person(s) who self-identify as any of the following:

SELECT ALL THAT APPLY

- 01 - Indigenous person(s) including First Nations, Inuit and Métis
- 02 - Black persons and/or person(s) of African decent
- 03 - Member(s) of another racialized community
- 04 - Member(s) of the 2SLGBTQIA+ community
- 05 - Person(s) living with a disability
- 06 - Women
- 07 - Persons younger than 40 years old
- 08 - Recent immigrant(s) to Canada (i.e., landed in Canada in the last 5 years)
- 09 - None of the above
- 99 - Don't know / Prefer not to say

13. Do you identify with any of the groups below? **SELECT ALL THAT APPLY**

01 - Indigenous person, including First Nations, Inuk or Métis

02 - Black person and/or person of African decent

03 - Member of another racialized community

04 - 2SLGBTQIA+ Person

05 - Person living with a disability

06 - Woman

07 - Under 40 years of age

08 - Recent immigrant to Canada (i.e., landed in Canada in the last 5 years)

09 - None of the above

99 - Prefer not to say

**That concludes the survey. This survey was conducted on behalf of
[Innovation, Science and Economic Development.](#)**

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