



Innovation, Science and
Economic Development Canada

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Développement économique Canada

Canadian Digital Adoption Program, Business – Advertising Campaign Evaluation Tool (ACET)

Final Report

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Development Canada**

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Canada

Canadian Digital Adoption Program, Business, Advertising Campaign Evaluation Tool (ACET) Final Report

Prepared for Innovation, Science and Economic Development Canada by Environics Research

MAY 2023

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Executive summary

A. Background and objectives

Innovation, Science and Economic Development Canada (ISED) works with Canadians in all areas of the economy and in all parts of the country 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 impact of the COVID-19 pandemic on small and medium-sized enterprises (SMEs) has been significant and highlights the need for Canadian businesses to adopt digital technologies to meet customers' needs and stay competitive. To encourage SMEs across the country to adopt digital technologies, the Government of Canada announced in Budget 2021, the Canada Digital Adoption Program (CDAP). The CDAP program will consist of two streams - the '**Grow your business online**' stream designed to help smaller retail storefront "brick and mortar" businesses take advantage of e-commerce opportunities, and the '**Boost your business technology**,' which is designed for larger small and medium businesses that require more comprehensive support to adopt or expand new technologies.

This digital transformation of Canadian SMEs will fuel economic recovery from the COVID-19 pandemic. As per The Directive on the Management of Communications, advertising campaigns that have a media budget of over \$1 million must be evaluated using the Advertising Campaign Evaluation Tool (ACET) issued by the Privy Council Communications and Consultations Secretariat.

This research project has two key research objectives:

- Pre- and post-campaign evaluation to assess and track campaign performance using the advertising campaign evaluation tool (ACET), customized for a small and medium-sized business audience. In accordance with the Communications Policy of the Government of Canada (GC), and mandatory for all advertising campaigns with a media component of \$1 million or more.
- The pre-campaign ACET established a baseline for evaluating and reporting on the effectiveness of the campaign in meeting its stated outcomes. The research also evaluates the effectiveness of the campaign by measuring the lift in awareness and uptake created by the campaign using the post-campaign ACET tool, customized for a business audience.
- Get a reading on the business audience's outlook on the current business environment, including its current priorities and challenges with respect to digital adoption and transformation.

B. Methodology

Environics conducted two bilingual, national, online surveys of small and medium sized enterprises (SMEs): one as a baseline, in advance of the advertising campaign in Spring 2022, and one following the end of the campaign in Spring 2023 to measure change in awareness and intent to visit over time and to assess impact of the campaign. The pre-campaign survey had a sample size of 1,001 and the post-campaign survey had a sample size of 1,011. Survey respondents qualified by virtue of being the owner, partner, or senior management of a micro, small or medium sized enterprise (defined as any business with fewer than 500 employees). The ACET survey questions follow a template setup by the Government of Canada for use in testing recall before and after an ad campaign. Additional questions were included in both surveys that do not relate specifically to the advertising recall but that instead explore attitudes towards other issues of interest to ISED. The following table shows the regional distribution achieved for each survey.

Region	Pre-campaign ACET	Post-campaign ACET
Atlantic	60	67
Quebec	264	260
Ontario	366	379
Man/Sask	63	62
Alberta	113	113
B.C./Terr	135	130
TOTAL	1,001	1,011

The pre-campaign survey was conducted from February 22 to March 8, 2022, and the post-campaign survey was conducted from March 7 to March 30, 2023.

Because respondents are recruited from a panel, these are non-probability surveys, and no formal estimates of sampling error can be calculated. Although opt-in panels are not random probability samples, online surveys can be used for surveys provided they are well-designed and employ a large, well-maintained panel, as was the case here.

More information about the methodology for these surveys is included in Appendix A.

C. Contract value

The contract value was \$169,688.82 (including HST)

D. Report

This report begins with an executive summary, outlining the key findings of the pre- and post-campaign surveys of SMEs, followed by a detailed analysis of the results and a methodology section covering both survey phases. Provided under separate cover are the detailed survey banner tables presenting the results of the surveys for all questions by population segments as defined by region and demographics. These tables are referenced by survey question in the detailed analysis. Note that the ACET questions relating specifically to recall of the advertising campaign are not reported on here. This report only reports on the additional questions asked of SMEs on related topics.

E. Use of findings of the research

Results from ACET testing and the added business outlook questions will not only evaluate the effectiveness of the campaign, but also have a better understanding of SMEs' current business conditions, perceptions on the GC's programs and initiatives, and priorities and challenges regarding digital adoption and transformation.

The findings from the pre-campaign baseline ACET will help to identify specific areas where the GC should focus its outreach activities and media tactics to maximize impact and benefits for businesses interested in initiating, accelerating, or expanding their digital adoption. The post-campaign awareness and recall testing will evaluate the campaign's success in meeting its objectives and in producing the intended outcomes. Additionally, the findings of the business outlook questions will be transferrable to program and policy areas serving SMEs, and can be used to support more effective and efficient promotion of similar programs, policies and services available to SMEs through the GC.

F. Key findings

Business Conditions and Challenges

Overall health of business

When asked how they would describe the overall health of their business, six in ten (60%) rated it positively as “5” (22%) or “4” (38%). This represents a five-point increase since the previous survey conducted in February/March 2022 before the CDAP ad campaign. One in ten would describe the health of their business negatively as “2” or “1”, down four percent from pre-campaign.

Biggest challenges facing business

When asked about the three biggest challenges currently facing their business, the most common responses include the cost of goods and services (41%, up six percent from pre-campaign), increasing profitability (30%, unchanged), hiring and employee retention (27%, up seven percent) and marketing/building a customer base (22%, down five percent). Smaller proportions mention a wide variety of other concerns, and these are largely unchanged from pre-campaign. Twelve percent mention cybersecurity as a major concern and this was not offered as an option in the pre-campaign survey.

Having a website and the ability to take online orders

In both the pre- and post-campaign surveys, 65 percent of SMEs report that their company has a website. Among those with a website, 65 percent (down one point) say their website can take online orders.

Business digital priorities in coming years

The top priorities for SMEs in the next one to three years are increasing online presence (77%, up four percent from pre-campaign) and sales (73%, up five percent), and increasing digital technology in the areas of marketing (70%, up four percent) and cybersecurity (70%, up three percent). About two-thirds also rate the rest of the areas high or medium priority, and these in average have a two to four percentage point increase from pre-campaign.

Challenges in growing online sales and business

About one-third say that getting available funds is challenging (34%, up six percent from pre-campaign). About one-fourth say that they face challenges such as hiring and retaining qualified talent (26%, up three percent) and the lack of knowledge of digital marketing (22%, down two percent). Just under two in ten mention the lack of knowledge of internet technologies, issues with data protection and online security and logistics issues as challenging, which are largely unchanged pre-campaign. About less than 15 percent of the respondents continue to face the other challenges.

Government Programs for Business

Government programs and supports for business

Half agree that the Government of Canada (GC) offers a wide variety of programs to support SMEs (50%, down four percent from pre-campaign). Just under five in ten agree that the GC has programs to support SMEs to increase the use of digital technology into business operations, develop an online presence, and grow online

sales (48%, 47% and 46%, largely unchanged). In addition, 45 percent continue to agree that the GC understands the challenges facing SMEs.

Importance of government priorities to support business

Over seven in ten continue to agree that helping businesses access financing (74%, up two percent from pre-campaign) and improving access to high-speed internet for all Canadians (74%, up three percent) are the two most important GC support activities for SMEs. Other top important activities include supporting regional economic development, promoting, and maintaining fair competition in the market and having competitive business tax regime (73%, 71% and 71%, essentially unchanged). The rest of the activities are rated important by just under seven in ten, and these are largely unchanged from pre-campaign. In addition, over one-third continue to rate all activities as very important, especially for improving access to high-speed internet for all Canadians where 45 percent say very important.

Rating government performance in support of businesses

About half think that the GC does a good job at encouraging Canadian businesses to innovate, helping businesses adopt digital technologies and improving access to high-speed internet for all Canadians (48%, 47% and 46%, mainly unchanged from pre-campaign). Other top GC performance areas include encouraging businesses to invest in green technology, supporting regional economic development and helping businesses access financing (45% each, largely unchanged). Helping businesses to scale up receives the lowest score at 39 percent, down three percent from pre-campaign.

Familiarity with programs for Canadian business

Top programs for SMEs that the respondents are familiar with include Canada Small Business Financing (39%, down seven percent from pre-campaign), CyberSecure Canada (35%, largely unchanged), Canada Business App (35%, largely unchanged), and GC Business Insights Newsletter/COVID-19 and Your Business Newsletter (35%, down eight percent). The rest of the programs are rated familiar by about three in ten, and these are mainly unchanged from pre-campaign. In addition, about one-third are familiar with Canada Innovation Corporation (32%) and Canada Digital Adoption Program (31%), which were not offered as options pre-campaign.

Usefulness of types of information for business

Over seven in ten think the top four useful types of information for SMEs are tax information (80%, not available as an option pre-campaign), GC and financing support programs (78%, up three percent from pre-campaign), cyber security (75%, up two percent) and a directory of GC programs (75%, not available pre-campaign). About seven in ten also find these types to be useful: digital adoption (70%, unavailable pre-campaign), updates on business conditions/outlooks (70%, down one percent), mental health (68%, unavailable pre-campaign) and workplace safety tips and tools (67%, up one percent).

Reaction to CDAP

Likelihood to seek out information about CDAP

After reading the full description of CDAP, almost six in ten SMEs (58%) say they are very (14%) or somewhat (44%) likely to seek out information about CDAP. About one-fourth are not very likely to seek out information about CDAP. Just under two in ten say they are not likely at all to seek out information or that information about CDAP is not applicable to their business.

Definition of “digital adoption”

About half think that digital presence such as website/e-commerce platforms (52%) and digital marketing/advertising (45%) best describe “digital adoption.” Just under four in ten think that digital payment systems (38%) and mobile apps (36%) describe “digital adoption” the best. About three in ten describe “digital adoption” as cloud computing (30%) and AI (28%). Collaborative/Project management tools appears on the bottom of the list at 20 percent.

Value of specific aspects of CDAP

The most valuable aspects of CDAP remain the same post-campaign, which are grants supporting technology adoption (74%, up four percent from pre-campaign), training and advisory services for increasing online presence (73%, up four percent) and zero interest loans for implementing technology into operations (73%, up two percent). Just under seven in ten think the rest of the four aspects are valuable as well and these are mainly unchanged from pre-campaign.

G. Political neutrality statement and contact information

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

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Detailed findings

A. Business Conditions and Challenges

1. Overall health of business

Six in ten SMEs say their business is in excellent/good health, up five percent from pre-campaign.

When asked how they would describe the overall health of their business, six in ten (60%) rated it positively as “5” (22%) or “4” (38%). This represents a five-point increase since the previous survey conducted in February/March 2022 before the CDAP ad campaign. One in ten would describe the health of their business negatively as “2” or “1”, down four percent from pre-campaign.

Health of business

Health of business	Post-campaign (n=1,011)	Pre-campaign (n=1,001)
Net: Excellent/Good	60%	55%
5 - Excellent	22%	20%
4	38%	36%
3	29%	29%
Net: Poor/Very poor	10%	14%
2	7%	9%
1- Very poor	3%	5%

Q13. On a scale of 1 to 5, How would you describe the overall health of your business right now? Is it...?

Those most likely to positively rate the overall health of their business (“4” or “5”) include larger businesses with 50 to 499 employees (80%), those in Quebec (67%), French-speakers (68%), those aged 18-34 (69%), men (66%), as well as those who recall the CDAP digital ad (74%).

2. Biggest challenges facing business

The biggest challenges facing SMEs are seen to be the cost of goods and services, increasing profitability, and hiring and employee retention.

When asked about the three biggest challenges currently facing their business, the most common responses include the cost of goods and services (41%, up six percent from pre-campaign), increasing profitability (30%, unchanged), hiring and employee retention (27%, up seven percent) and marketing/building a customer base (22%, down five percent). Smaller proportions mention a wide variety of other concerns, and these are largely unchanged from pre-campaign. Twelve percent mention cybersecurity as a major concern and this was not offered as an option in the pre-campaign survey.

Biggest challenges facing business

Biggest challenges facing business	Post-campaign (n=1,011)	Pre-campaign (n=1,001)
Cost of goods and services	41%	35%
Increasing profitability	30%	30%
Hiring and employee retention	27%	20%
Marketing/building customer base	22%	27%
Increasing productivity	18%	18%
Supply chain challenges/logistics	17%	18%
Responding to competitors	14%	13%
Applying new technology to operations	13%	14%
Government Regulations	12%	15%
Securing financing/loans	12%	14%
Cybersecurity	12%	N/A
Finding partnerships or mentorship	8%	7%
Product development and testing	5%	8%
None, we have no challenges	5%	7%
Other	1%	2%
COVID-19 related issues/effects on markets	0%	2%

Q14. What are the three biggest challenges currently facing your business?

There are a few notable subgroup differences in what challenges are identified. Those more likely to rate the cost of goods and services as their biggest challenge include businesses with 2-4 employees (50%) and those who completed the survey in English (44%). Increasing profitability is identified more often as a challenge by smaller businesses with just one employee (38%). Hiring and employee retention is more of a challenge to businesses with five to 49 (35%) or 50 to 499 (38%) employees and those who completed the survey in French (36%). Marketing and building a customer base is a bigger challenge for businesses with one (41%) or two to four employees (30%). Medium sized businesses with 50 to 499 employees are also more likely to identify supply chain challenges and logistics (25%), cybersecurity (23%) and applying new technology to operations (21%).

3. Having a website and the ability to take online orders

Two-thirds say their company currently has a website. Among those with a website, two-thirds say their site can take online orders. These are largely unchanged from pre-campaign.

In both the pre- and post-campaign surveys, 65 percent of SMEs report that their company has a website. Among those with a website, 65 percent (down one point) say their website can take online orders.

Have a website and can take online orders

Respondents who said yes to both questions	Post-campaign (n=1,011)	Pre-campaign (n=1,001)
Yes, company has a website.	65%	65%
Yes, website can take online orders. SUBSAMPLE: Company has a website (n = 662)	65%	64%

Q19 Does your company currently have a website?

Q20 Does your company's website have the ability to take online orders? SUBSAMPLE: Those whose company has a website (n = 662)

Those who are more likely to have a company website include medium-sized enterprises with 50-499 employees (84%), those aged 18-34 (72%) and 35-54 (70%), men (70%), those who recall the CDAP ad (78%) and those who are likely to seek info on CDAP (74%).

Among those with a website, these subgroups are more likely to have the ability to take online orders: medium-sized enterprises with 50-499 employees (73%), those completed the survey in English (66%), those aged 18-34 (71%), men (68%), those who recall the CDAP ad (75%) and those who are likely to seek info on CDAP (70%).

4. Business digital priorities in coming years

Between 55 and 77 percent of SMEs say all areas are a medium to high priority for their business over the coming years. The highest priorities are increasing online presence, increasing digital technology in marketing and cybersecurity and increasing online sales. Priorities have increased slightly from pre-campaign across the board.

The top priorities for SMEs in the next one to three years are increasing online presence (77%, up four percent from pre-campaign) and sales (73%, up five percent), and increasing digital technology in the areas of marketing (70%, up four percent) and cybersecurity (70%, up three percent). About two-thirds also rate the rest of the areas high or medium priority, and these in average have a two to four percentage point increase from pre-campaign.

Net high/medium priority for SMEs over next one to three years

Respondents rated "4 – A high priority" or "3 – A medium priority"	Post-campaign (n=1,011)	Pre-campaign (n=1,001)
Increasing its online presence (e.g., creating a business website, using social media, digital marketing)	77%	73%
Increasing digital technology in the area of marketing	73%	68%
Increasing digital technology in the area of cybersecurity	70%	66%
Increasing its online sales.	70%	67%
Increasing digital technology in the area of accounting	68%	64%
Increasing digital technology in the area of production	61%	58%
Increasing digital technology in the area of human resources	61%	56%
Increasing digital technology in the area of shipping and receiving	58%	55%
Increasing digital technology in the area of manufacturing	55%	53%

Q21 Thinking about the next one to three years, how much of a priority are each of the following going to be for your business?

Those who are more likely to say all areas are of a high or medium priority to their business over the next one to three years include medium sized enterprises with 50-499 employees, those who completed the survey in English, those aged 18-34, those who recall the CDAP ad and those who are likely to seek info on CDAP.

5. Challenges in growing online sales and business

Availability of funds, hiring and retaining qualified talent and lack of knowledge of digital marketing continue to be the biggest challenges to growing online sales.

About one-third say that getting available funds is challenging (34%, up six percent from pre-campaign). About one-fourth say that they face challenges such as hiring and retaining qualified talent (26%, up three percent) and the lack of knowledge of digital marketing (22%, down two percent). Just under two in ten mention the lack of knowledge of internet technologies, issues with data protection and online security and logistics issues as challenging, which are largely unchanged pre-campaign. About less than 15 percent of the respondents continue to face the other challenges.

Challenges in growing business/sales online

Challenges in growing business/sales online	Post-campaign (n=1,011)	Pre-campaign (n=1,001)
Available funds	34%	28%
Hiring and retaining qualified talent	26%	23%
Lack of knowledge of digital marketing	22%	24%
Lack of knowledge of Internet technologies	19%	18%
Issues with data protection and online security	18%	17%
Logistical issues	18%	16%
Challenges with taking online orders (e.g., credit card processing)	15%	14%
Issues with exporting outside of Canada	12%	13%
Issues with order processing	11%	12%
Lack of internet connectivity	11%	12%
Other	1%	2%
None of these	19%	22%

Q22 Which of these challenges does your business face in growing your business online or growing your online sales, if any?

There are a few notable subgroup differences in what challenges are identified. Medium-sized enterprises with 50-499 employees and with five to 49 employees are more likely to say that retaining qualified talent (36% and 31%) is challenging. Medium-sized enterprises also face issues with data protection and online security (25%) more often. Getting available funds is a bigger challenge for those who completed the survey in English (39%). Those who completed the survey in French are more likely to say they have none of these challenges (28%). Logistical issues are more of a challenge for those aged 28-34 (23%) while those aged 55+ are more often identified with none of these challenges (32%).

B. Government of Canada Programs for Business

1. Government programs and supports for business

About half continue to agree that the government understands the challenges facing SMEs and that it offers programs to support business in various ways, such as programs to develop an online presence, grow online sales and increase the use of digital technology.

Half agree that the Government of Canada (GC) offers a wide variety of programs to support SMEs (50%, down four percent from pre-campaign). Just under five in ten agree that the GC has programs to support SMEs to increase the use of digital technology into business operations, develop an online presence and grow online sales (48%, 47% and 46%, largely unchanged). In addition, 45 percent continue to agree that the GC understands the challenges facing SMEs.

Net agreement with statements about Government of Canada supports for business

Respondents saying strongly or somewhat agree	Post-campaign (n=1,011)	Pre-campaign (n=1,001)
The Government of Canada offers a wide variety of programs to support Canadian businesses	50%	54%
The Government of Canada has programs that support Canada’s small and medium sized businesses increase the use of digital technology into their business operations	48%	48%
The Government of Canada has programs that support Canada’s small and medium sized businesses to develop an online presence (e.g., create a company website)	47%	46%
The Government of Canada has programs that support Canada’s small and medium sized businesses to grow their online sales	46%	45%
The Government of Canada understands the challenges facing Canadian businesses	45%	46%

Q15 a, b, c, d, e. To what extent do you agree or disagree with each of the following statements ...?

Those more likely to agree with all these statements include those working at medium-sized enterprises with 50 to 499 employees, those aged 18-34, men, those who recall having seen the CDAP ad and those who are likely to seek info on CDAP. Those who completed the survey in English are also more likely to agree that the GC offers a variety of programs to support SMEs and programs to develop an online presence.

2. Importance of government priorities to support businesses

Large majorities of SMEs rate all of the government’s priorities to support businesses as important, particularly helping business access financing, improving access to high-speed internet for all Canadians and supporting regional economic development. Importance is consistently similar to pre-campaign.

Over seven in ten continue to agree that helping businesses access financing (74%, up two percent from pre-campaign) and improving access to high-speed internet for all Canadians (74%, up three percent) are the two most important GC support activities for SMEs. Other top important activities include supporting regional economic development, promoting, and maintaining fair competition in the market and having competitive business tax regime (73%, 71% and 71%, essentially unchanged). The rest of the activities are rated important by just under seven in ten, and these are largely unchanged from pre-campaign. In addition, over one-third continue to rate all activities as very important, especially for improving access to high-speed internet for all Canadians where 45 percent say very important.

Net importance about Government of Canada support activities for business

Respondents rated “5 – Very important” or “4”	Post-campaign (n=1,011)	Pre-campaign (n=1,001)
Helping businesses access financing	74%	72%
Improving access to high-speed internet for all Canadians	74%	71%
Supporting regional economic development	73%	72%
Promoting and maintaining fair competition in the market	71%	70%
Having a competitive business tax regime	71%	70%
Improving the government’s online service experience for business	70%	71%
Encouraging Canadian businesses to innovate	70%	68%
Helping businesses to scale up	70%	67%
Helping businesses adopt digital technologies	69%	64%
Helping businesses access new markets	69%	69%
Helping businesses protect and use their intellectual property for commercial success	68%	69%
Investing in infrastructure to move goods more efficiently	68%	67%
Promoting incentives that encourage businesses to invest in green technology	67%	67%
Investing in domestic manufacturing	65%	65%

Q16 a to n. 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.

Those working at medium-sized enterprises with 50 to 499 employees are more likely to think that encouraging businesses to invest in green technology is important (76%). Those who completed the survey in French are more likely to say that encouraging businesses to innovate is important (76%). Those aged 55+ and those in the Atlantic provinces are more likely to rate improving access to high-speed internet for all Canadians as important (80% and 85%). Those who are likely to seek information on CDAP are more likely to feel that that all these areas are important.

3. Rating government performance in support of businesses

Between four and five in ten SMEs give the GC a good ratings on all areas that relate to support for businesses. The highest ratings are for encouraging Canadian businesses to innovate and helping businesses adopt digital technologies being the top two. Performance ratings are largely unchanged from pre-campaign.

About half think that the GC does a good job at encouraging Canadian businesses to innovate, helping businesses adopt digital technologies and improving access to high-speed internet for all Canadians (48%, 47% and 46%, mainly unchanged from pre-campaign). Other top GC performance areas include encouraging businesses to invest in green technology, supporting regional economic development and helping businesses access financing (45% each, largely unchanged). Helping businesses to scale up receives the lowest score at 39 percent, down three percent from pre-campaign.

Net good job on Government of Canada support activities performance

Respondents rated “5 – Very good job” or “4”	Post-campaign (n=1,011)	Pre-campaign (n=1,001)
Encouraging Canadian businesses to innovate	48%	47%
Helping businesses adopt digital technologies	47%	45%
Improving access to high-speed internet for all Canadians	46%	46%
Promoting incentives that encourage businesses to invest in green technology	45%	45%
Supporting regional economic development	45%	45%
Helping businesses access financing	45%	47%
Promoting and maintaining fair competition in the market	43%	45%
Helping businesses protect and use their intellectual property for commercial success	43%	42%
Improving the government’s online service experience for business	42%	45%
Helping businesses access new markets	41%	42%
Investing in infrastructure to move goods more efficiently	41%	44%
Investing in domestic manufacturing	40%	44%
Having a competitive business tax regime	40%	42%
Helping businesses to scale up	39%	42%

Q17 a to n. On a scale of 1 to 5, how would you rate the performance of the Government of Canada in each of these same areas.

Those more likely to say that the GC does a good job in all these areas include those working at medium-sized enterprises with 50 to 499 employees, those aged 18-34, those who recall the CDAP ad and those who are likely to seek info on CDAP. Those who completed the survey in English are also more likely to say that the GC does a good job at encouraging businesses to innovate, invest in green technology and at helping businesses access financing.

4. Familiarity with programs for Canadian businesses

Familiarity with various specific government programs that support businesses ranged from 25 to 39 percent. Familiarity is highest for the Canada Small Business Financing Program, CyberSecure Canada, Canada Business App and GC Business Insights Newsletter. Familiarity with these programs is largely consistent with pre-campaign.

Top programs for SMEs that the respondents are familiar with include Canada Small Business Financing (39%, down seven percent from pre-campaign), CyberSecure Canada (35%, largely unchanged), Canada Business App (35%, largely unchanged), and GC Business Insights Newsletter/COVID-19 and Your Business Newsletter (35%, down eight percent). The rest of the programs are rated familiar by about three in ten, and these are mainly unchanged from pre-campaign. In addition, about one-third are familiar with Canada Innovation Corporation (32%) and Canada Digital Adoption Program (31%), which were not offered as options pre-campaign.

Net familiar with programs for Canadian businesses

Respondents rated “1 – Very familiar” or “2 – Somewhat familiar”	Post-campaign (n=1,011)	Pre-campaign (n=1,001)
Canada Small Business Financing Program	39%	46%
CyberSecure Canada	35%	34%
Canada Business App	35%	33%
GC Business Insights Newsletter/COVID-19 and Your Business Newsletter*	35%	43%
Regional Economic Growth through Innovation	32%	33%
The Business Benefits Finder Website	32%	32%
Canada Innovation Corporation	32%	N/A
Innovative Solutions Canada	32%	33%
Strategic Innovation Fund	31%	33%
Canada Digital Adoption Program	31%	N/A
Intellectual Property Strategy	30%	30%
Black Entrepreneurship Program	29%	31%
Accelerated Growth Service	28%	29%
Global Innovation Clusters/Innovation Superclusters Initiative*	28%	27%
Venture Capital Catalyst Initiative	27%	29%
Biomanufacturing	27%	28%
Clean Growth Hub	27%	28%
The 50 – 30 Challenge	25%	26%

*Program name was changed from pre-campaign to post-campaign

Q18 a to r. 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”.

Those who are more likely to be familiar with all these programs include businesses with five to 49 or 50 to 499 employees, those who completed the survey in English, those aged 18-34, men, those who recall the CDAP ad

and those who are likely to seek info on CDAP. Familiarity tends to be lower among businesses with one or two to four employees, those who completed the survey in French, those aged 55+, and women.

5. Usefulness of types of information for business

Majorities find all types of information useful, with tax information, GC and financing support programs, cyber security and a directory of GC programs being the top for SMEs. The usefulness of existing types of information remains largely unchanged from pre-campaign.

Over seven in ten think the top four useful types of information for SMEs are tax information (80%, not available as an option pre-campaign), GC and financing support programs (78%, up three percent from pre-campaign), cyber security (75%, up two percent) and a directory of GC programs (75%, not available pre-campaign). About seven in ten also find these types to be useful: digital adoption (70%, unavailable pre-campaign), updates on business conditions/outlooks (70%, down one percent), mental health (68%, unavailable pre-campaign) and workplace safety tips and tools (67%, up one percent).

Net usefulness of types of information for business

Respondents rated “4 – Very useful” or “3 – Somewhat useful”	Post-campaign (n=1,011)	Pre-campaign (n=1,001)
Tax information	80%	N/A
Government of Canada and financing support programs	78%	75%
Cyber security	75%	73%
A directory of Government of Canada programs for businesses	75%	N/A
Digital adoption information	70%	N/A
Updates on business conditions/outlooks	70%	71%
Mental health information	68%	N/A
Workplace safety tips and tools	67%	66%
Environmental sustainability resources	65%	N/A
Small business statistics and Census data	65%	63%
Credit insurance	65%	61%
Intellectual property information	64%	64%
Supply chain/logistics	61%	N/A
Diversity and inclusion resources	60%	N/A
Export tips and tools	57%	57%
The evolving state of Canadian manufacturing	57%	N/A
Artificial intelligence	56%	N/A

Q25. How useful are each of the following types of information to your business right now?

A few subgroup differences stand out in what information is identified as useful. Those who are more likely to think all information is useful include those who completed the survey in English, those who recall the CDAP ad, except for tax, and those who are likely to seek info on CDAP. Those who aged 18-34 are more likely to say that all information but tax and cyber security useful. Additionally, medium-sized companies with 50-499 employees

more often find information about digital adoption (87%), cyber security (85%), mental health (82%), and workplace safety tips and tools (82%) useful.

C. Reaction to CDAP

1. Likelihood to seek out information about CDAP

Just under six in ten say they are likely to seek out more information about CDAP after being given a full description of the program.

After reading the full description of CDAP, almost six in ten SMEs (58%) say they are very (14%) or somewhat (44%) likely to seek out information about CDAP. About one-fourth are not very likely to seek out information about CDAP. Just under two in ten say they are not likely at all to seek out information or that information about CDAP is not applicable to their business.

Likelihood to seek out information about CDAP

Likelihood	Very likely	Somewhat likely	Not very likely	Not likely at all/ Not applicable to my business
Post-campaign (n=1,011)	14%	44%	24%	18%

Q23 a. To encourage small and medium businesses (SMEs) across the country to adopt digital technologies, the Government of Canada announced in Budget 2021, the Canada Digital Adoption Program (CDAP). CDAP offers digital adoption support to SMEs in any industry through two streams: smaller SMEs that need basic support to create digital storefronts and implement e-commerce; and the larger and/or more sophisticated SMEs looking to expand digital capabilities and improve productivity through digital transformation. Overall, how likely are you to seek out more information about the Canada Digital Adoption Program (CDAP)?

Those who are more inclined to be at least somewhat likely to seek out information about CDAP include medium-sized enterprises with 50-499 employees (73%), those in Ontario (67%), English speakers (62%), those aged 18-34 (66%) and 35-54 (62%), men (62%), and those who recall the CDAP ad (68%).

2. Definition of “digital adoption”

The term “digital adoption” is mostly commonly seen as meaning a having digital presence such as website/e-commerce platforms, digital marketing/advertising, digital payment systems and mobile apps.

About half think that digital presence such as website/e-commerce platforms (52%) and digital marketing/advertising (45%) best describe “digital adoption.” Just under four in ten think that digital payment systems (38%) and mobile apps (36%) describe “digital adoption” the best. About three in ten describe “digital adoption” as cloud computing (30%) and AI (28%). Collaborative/Project management tools appears on the bottom of the list at 20 percent.

What best describes “digital adoption”

What best describes “digital adoption”	Post-campaign (n=1,011)
Website/E-commerce platforms	52%
Digital marketing/advertising	45%
Digital payment systems	38%
Mobile apps	36%
Cloud computing	30%
Artificial intelligence (AI)	28%
Collaborative/Project management tools	20%
Other	1%
None of these	9%

Q23 b. From a business perspective, which of the following concepts best describes the term “digital adoption” for you?

There are a few notable differences between subgroups in how they define “digital adoption.” Medium-sized enterprises with 50-499 employees identify more with describing “digital adoption” as cloud computing (39%) and AI (38%). Those who completed the survey in English are more likely to describe “digital adoption” as digital marketing/advertising (46%), digital payment systems (41%) and cloud computing (31%). Those who are more likely to seek info on CDAP are also more often to say all the terms describe “digital adoption” the best.

3. Value of specific aspects of CDAP

Large majorities of SMEs find all aspects of CDAP to be at least somewhat valuable to them. The most valuable aspects are micro-grants supporting technology adoption, training and advisory services for increasing online presence, and zero interest loans for implementing technology into operations. These are largely unchanged from pre-campaign.

The most valuable aspects of CDAP remain the same post-campaign, which are grants supporting technology adoption (74%, up four percent from pre-campaign), training and advisory services for increasing online presence (73%, up four percent) and zero interest loans for implementing technology into operations (73%, up two percent). Just under seven in ten think the rest of the four aspects are valuable as well and these are mainly unchanged from pre-campaign.

Net valuable of CDAP aspects

Respondents rated “4 – Very valuable” or “3 – Somewhat valuable”	Post-campaign (n=1,011)	Pre-campaign (n=1,001)
Micro grants to support costs associated with technology adoption	74%	70%
Training and advisory services to increase your business’ online presence (e.g., help to create/improve a company website)	73%	69%
Zero interest loans to implement technology into your business’ operations	73%	71%
Training and advisory services to support your business incorporating more technology into its operations	69%	68%
Grants to pay for advisory services to develop a tailored digital adoption plan	69%	68%
Training and advisory services to increase your business’ online sales	69%	66%
Training and work opportunities for up to 28,000 young people to help businesses across Canada adopt new technology Sectors	65%	65%

Q24. How valuable are each of the following aspects of the Canada Digital Adoption Program to your business?

There are a few notable subgroup differences in what aspects are identified as valuable. Medium-sized enterprises with 50-499 employees are more likely to say that training and advisory services for incorporating more technology into operations is valuable (83%). Medium-sized enterprises and those who aged 18-34 are more often to identify training and work opportunities for up to 28,000 young people to help Canadian SMEs adopt new technology sectors as valuable (83% and 76%). Those who completed the survey in English, those who recall the CDAP ad and those who are likely to seek info on CDAP are more often to identify all aspects as valuable.

Appendix A: ACET methodology

The ACET was conducted in two phases: a benchmarking phase prior to the campaign, and a post-campaign phase. Each survey instrument consisted of the Advertising Campaign Evaluation Tool questions used by the Government of Canada for evaluating campaigns over \$1,000,000. The post-campaign survey added questions testing recall of specific aspects of the campaign, along with questions testing the impact on perceptions and behaviour, and a series of questions on specific to the CDAP program.

Sample design and weighting

In each case, respondents to the online survey qualified by virtue of being the owner, partner, or senior management of a micro, small or medium sized enterprise (defined as any business with fewer than 500 employees). The sample included all provinces, and the survey was administered in English and French, as well as with an accessible link for those using a mobile phone or screen reading technology.

Because respondents are recruited from a panel, this is a non-probability survey and no formal estimates of sampling error can be calculated. Although opt-in panels are not random probability samples, online surveys can be used for general population surveys provided they are well-designed and employ a large, well-maintained panel.

The surveys obtained the following regional distributions:

Region	Unweighted Sample Wave 2	Unweighted Sample Wave 1
Atlantic Canada	67	60
Quebec	260	264
Ontario	379	366
Prairies	175	176
B.C.	130	135
CANADA	1,011	1,001

Questionnaire design

The survey used the standard Government of Canada ACET survey questionnaire, with additional questions approved by ISED to accommodate specific analysis objectives.

Environics' data analysts programmed the questionnaires, then performed thorough testing to ensure accuracy in set-up and data collection. This validation ensured that the data entry process conformed to the surveys' basic logic. The data collection system handles sampling invitations, quotas and questionnaire completion (skip patterns, branching and valid ranges).

The final survey questionnaires are included in Appendix B.

Fieldwork

The surveys were conducted by Environics using a secure, fully featured web-based survey environment located in Canada. The pre-campaign ACET survey field period was from February 22-March 8, 2022 (average length 15 minutes) and the post-campaign ACET survey was undertaken from March 7-March 30, 2023 (average length 15 minutes).

All respondents were offered the opportunity to complete the surveys in their official language of choice. Each survey was registered with the Canadian Research Insights Council’s Research Verification Service, so respondents validate its authenticity. Survey data collection adhered to Government of Canada’s standard for public opinion research as well as all applicable industry standards as set out by the Canadian Research Insights Council, of which Environics is a founding member. Environics informed respondents of their rights under the *Privacy Act* and the *Access to Information Act* and ensured that those rights were protected throughout the research process. This included: informing respondents of the purpose of the research; identifying both the sponsoring department and the research supplier; informing respondents that their participation in the study is voluntary, and that the information provided would be administered according to the requirements of the *Privacy Act*.

The data from this survey are statistically weighted to ensure the sample is as representative of this population as possible, according to the most recently available Census information.

Completion results

The completion results are presented in the following table.

Contact disposition

Disposition		Post-campaign ACET (N)	Pre-campaign ACET (N)
Total invitations	(c)	37,287	39,530
Total completes	(d)	1,001	1,011
Qualified breakoffs	(e)	249	376
Disqualified	(f)	608	1,579
Not responded	(g)	34,676	36,002
Quota filled	(h)	753	562
Contact rate = (d+e+f+h)/c (%)		7%	9%
Participation rate = (d+f+h)/c (%)		6%	8%

Respondent Profile

Respondent Profile

	Post-Campaign
Position	
Owner/Partner	65%
Senior Manager	35%
Number of Fulltime Staff	
1	20%
2-4	18%
5-49	34%
50-499	28%
Region	
Atlantic	7%
Quebec	26%
Ontario	37%
Manitoba/ Saskatchewan	6%
Alberta	11%
British Columbia/Northwest Territories	13%
Age	
18-34	33%
35-54	45%
55+	22%
Gender	
Male	50%
Female	50%
Location	
In a city	52%
In a suburb	30%
In a rural area	16%
Identity of person(s) own over 50% of the organization	
Women	39%
Persons younger than 40 years old	18%
Member(s) of another racialized community	12%
Person(s) living with a disability	9%
Member(s) of the LGBTQ2+ community	8%
Black persons and/or person(s) of African decent	8%
Recent immigrant(s) (i.e., landed in Canada in the last 5 years)	7%
Indigenous person(s) including First Nations, Inuit and Métis	5%
None of the above	32%
Don't know / Prefer not to say	4%

<i>Respondent Identity</i>	
Woman	44%
Under 40 years of age	22%
Member of another racialized community	11%
Person living with a disability	8%
LGBTQ2+ Person	8%
Black person and/or person of African decent	6%
Indigenous person, including First Nations, Inuk or Métis	4%
Recent immigrant to Canada (i.e., landed in Canada in the last 5	4%
None of the above	28%
Prefer not to say	2%
<i>Industry Sector</i>	
Professional, scientific and technical services	16%
Construction	11%
Retail trade	11%
Manufacturing	7%
Arts, entertainment and recreation	7%
Health care and social assistance	6%
Finance and insurance	5%
Educational services	5%
Accommodation, food services and tourism	4%
Real estate and rental and leasing	4%
Wholesale trade	3%
Agriculture, forestry, fishing and hunting	3%
Transportation and warehousing	3%
Management of companies and enterprises	3%
Utilities	2%
Skilled services (ex. Mechanic)	2%
Personal services/care (ex. Beauty/hair care)	1%
Information and cultural industries	1%
Administrative and support, waste management and remediation	1%
Public administration	1%
Mining, quarrying, and oil and gas extraction	1%
Other	2%

Appendix B: ACET questionnaires

February 19, 2022

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

N = 1,000 owners, partners, senior managers of Canadian businesses

INTRODUCTION

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

Your participation is voluntary, and your responses will be kept entirely confidential. The survey takes about 15 minutes to complete. You may opt-out of the survey at any time

This survey is being conducted by Environics Research on behalf of the Government of Canada. The survey is being administered according to the requirements of the Privacy Act and is registered with the Canadian Research Insights Council's (CRIC) Research Verification Service.

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.

START SURVEY

If you require any assistance, please contact ergonlinesurveysupport@Environics.ca.

1. 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**

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

- 01 - 1
- 02 - 2-4
- 03 - 5-24
- 04 - 25-49
- 05 - 50-99
- 06 - 100-249
- 07 - 250-499
- 08 - 500 or more **TERMINATE**

3. 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**

4. 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

5. Are you...

- 01 - Male
- 02 - Female
- 03 - Gender diverse
- 99 - Prefer not to say

6. 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

7. Which of the following industry sectors best describes your company's main business?

- 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

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

- 01 - Yes
- 02 - No **SKIP TO Q. 10**

IF YES TO Q8, ASK Q9

9. Think about the most recent ad from the Government of Canada that comes to mind, what do you remember about this ad?

- [RECORD]
- Don't remember

CAMPAIGN SPECIFIC ACET QUESTIONS - UNAIDED

ASK ALL RESPONDENTS

10. Over the past three weeks, have you seen, read or heard any Government of Canada advertisements on programs that help small and medium businesses adopt digital technologies to create digital storefronts, implement e-commerce or expand their digital capabilities?

- 01 - Yes
- 02 - No **SKIP TO Q. 13**

IF YES TO Q10, ASK Q11 AND Q12)

11. Where did you see, read or hear this Government of Canada advertisement on programs that help small and medium businesses adopt digital technologies to create digital storefronts, implement e-commerce or expand their digital capabilities?

SELECT ALL THAT APPLY

- 01 - Website
- 02 - Magazines
- 03 - Newspaper (online)
- 04 - Billboards
- 05 - Digital Billboards
- 06 - Radio
- 07 - Twitter
- 08 - YouTube
- 09 - LinkedIn
- 10 - Spotify
- 11 - Google
- 12 - Bing
- 98 - Other, specify _____ **ANCHOR**
- 99 - Don't remember **ANCHOR...EXCLUSIVE**

12. What do you remember about this ad?

- [RECORD]
- Don't remember

ASK ALL

13. On a scale of 1 to 5, How would you describe the overall health of your business right now? Is it...?

- | | | | | |
|-----------|----|----|----|-----------|
| Very poor | | | | Excellent |
| 01 | 02 | 03 | 04 | 05 |

99 - Don't know/prefer not to say

14. What are the three biggest challenges currently facing your business?

SELECT UP TO THREE...RANDOMIZE

- 01 - Securing financing/loans
- 02 - Product development and testing
- 03 - Marketing/building customer base
- 04 - Hiring and employee retention
- 05 - Increasing productivity
- 06 - Increasing profitability
- 07 - Government regulations
- 08 - Responding to competitors
- 09 - Finding partnerships or mentorship
- 10 - Supply chain challenges/logistics
- 11 - Cost of goods and services
- 12 - Applying new technology to operations
- 13 - Other, please specify: **ANCHOR**
- 14 - None, we have no challenges **ANCHOR...EXCLUSIVE**
- 99 - Don't know/prefer not to say **ANCHOR...EXCLUSIVE**

15. 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

- 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 an online presence (e.g., create a company website)
- d) The Government of Canada has programs that support Canada's small and medium sized businesses to grow their online sales
- e) The Government of Canada has programs that support Canada's small and medium sized businesses increase the use of digital technology into their business operations

16. 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

17. 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 job
- 02
- 03
- 04
- 05 – Very good job
- 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

18. 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 - Somewhat familiar
- 04 - 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) Canada Business App
- o) The Business Benefits Finder Website
- p) COVID-19 and Your Business Newsletter

19. Does your company currently have a website ?

- 01 - Yes
- 02 - No **SKIP TO Q.21**

IF YES TO Q19, ASK Q20

20. Does your company's website have the ability to take online orders?

- 01 - Yes
- 02 - No
- 99 - Don't know

ASK ALL

21. Thinking about the next one to three years, how much of a priority are each of the following going to be for your business?

RANDOMIZE ...CAROUSEL

- 01 - Not at all a priority
- 02 - A low priority
- 03 - A medium priority
- 04 - A high priority
- 05 - Don't know/Not applicable to my business
- a) Increasing online sales.
- b) Increasing its online presence (e.g., creating a business website, using social media, digital marketing)
- c) Increasing digital technology in the area of human resources
- d) Increasing digital technology in the area of production
- e) Increasing digital technology in the area of shipping and receiving
- f) Increasing digital technology in the area of accounting
- g) Increasing digital technology in the area of marketing
- h) Increasing digital technology in the area of manufacturing
- i) Increasing digital technology in the area of cybersecurity

ASK ALL

22. Which of these challenges does your business face in growing your business online or growing your online sales, if any?

CHECK ALL THE APPLY...RANDOMIZE

- 01 - Issues with data protection and online security
 - 02 - Lack of knowledge of Internet technologies
 - 03 - Lack of knowledge of digital marketing
 - 04 - Logistical issues
 - 05 - Lack of internet connectivity
 - 06 - Issues with order processing
 - 07 - Challenges with taking online orders (e.g., credit card processing)
 - 08 - Issues with exporting outside of Canada
 - 09 - Hiring and retaining qualified talent
 - 10 - Available funds
 - 11 - None of these
 - 98 - Other, please specify: _____
- ANCHOR EXCLUSIVE**
ANCHOR EXCLUSIVE

24. To encourage small and medium businesses (SMEs) across the country to adopt digital technologies, the Government of Canada announced in Budget 2021, the Canada Digital Adoption Program (CDAP). CDAP will offer digital adoption support to SMEs in any industry through two streams: smaller SMEs that need basic support to create digital storefronts and implement e-commerce; and the larger and/or more sophisticated SMEs looking to expand digital capabilities and improve productivity through digital transformation.

How valuable are each of the following aspects of the program to your business?

RANDOMIZE...CAROUSEL

- 01 - Not at all valuable/Not applicable
 - 02 - Not very valuable
 - 03 - Somewhat valuable
 - 04 - Very valuable
- a) Training and advisory services to increase your business' online presence (e.g., help to create/improve a company website)
 - b) Training and advisory services to increase your business' online sales
 - c) Training and advisory services to support your business incorporating more technology into its operations
 - d) Micro grants to support costs associated with technology adoption
 - e) Grants to pay for advisory services to develop a tailored digital adoption plan
 - f) Zero interest loans to implement technology into your business' operations
 - g) Training and work opportunities for up to 28,000 young people to help businesses across Canada adopt new technology

25. How useful are each of the following types of information to your business right now.?

RANDOMIZE...CAROUSEL

- 01 - Not at all useful/Not applicable
 - 02 - Not very useful
 - 03 - Somewhat useful
 - 04 - Very useful
- a) Pandemic support information for businesses
 - b) COVID-19 outbreak updates
 - c) Federal rapid testing programs
 - d) Workplace safety tips and tools
 - e) Vaccination resources for employers
 - f) Updates on business conditions/outlooks
 - g) Government of Canada and financing support programs
 - h) Intellectual property information
 - i) Small business statistics and Census data
 - j) Cyber security
 - k) Export tips and tools
 - l) Credit insurance

26. Is your organization over 50% owned by person(s) who self-identified 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 LGBTQ2+ 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

27 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 - LGBTQ2+ 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..

THNK2: We regret that your responses have shown you are ineligible to participate in this survey. Thank you for your time.

February 28, 2023

ADVERTISING CAMPAIGN EVALUATION TOOL
Innovation, Science and Economic Development Canada
Canada Digital Adoption Program (CDAP)
Post-Campaign Questionnaire – Environics Research

N = 1,000 owners, partners, senior managers of Canadian businesses

INTRODUCTION

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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.

START SURVEY

Click here [INSERT LINK: <https://www.canadianresearchinsightscouncil.ca/rvs/home/>] if you wish to verify the authenticity of this survey. **Survey registration number 20220203-EN249**

To view our privacy policy, [click here](#). [INSERT LINK <https://environics.ca/about-us/privacy-policy/>]

If you require any technical assistance, please contact: [Survey Support](#). [INSERT LINK ergonlinesurveysupport@Environics.ca].

3. 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**

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

01 - 1
02 - 2-4
03 - 5-24
04 - 25-49
05 - 50-99
06 - 100-249
07 - 250-499
08 - 500 or more **TERMINATE**

3. 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**

4. 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

5. Are you...

- 01 - Male
- 02 - Female
- 03 - Gender diverse
- 99 - Prefer not to say

6. 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

7. Which of the following industry sectors best describes your company's main business?

- 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

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

- 01 - Yes
- 02 - No **SKIP TO Q. 10**

IF YES TO Q8, ASK Q9

9. Think about the most recent ad from the Government of Canada that comes to mind, what do you remember about this ad?

- [RECORD]
- 99 - Don't remember

CAMPAIGN SPECIFIC ACET QUESTIONS - UNAIDED

ASK ALL RESPONDENTS

10. Over the past three weeks, have you seen, read or heard any Government of Canada advertisements on programs that help small and medium businesses adopt digital technologies to create digital storefronts, implement e-commerce or expand their digital capabilities?

- 01 - Yes
- 02 - No **SKIP TO Q. 13**

IF YES TO Q10, ASK Q11 AND Q12)

11. Where did you see, read or hear this Government of Canada advertisement on programs that help small and medium businesses adopt digital technologies to create digital storefronts, implement e-commerce or expand their digital capabilities?

SELECT ALL THAT APPLY...RANDOMIZE

- 01 - Website
- 02 - Magazines
- 03 - Newspaper (online)
- 04 - Billboards
- 05 - Digital Billboards
- 06 - Radio
- 07 - Twitter
- 08 - YouTube
- 09 - LinkedIn
- 10 - Spotify
- 11 - Google
- 12 - Bing
- 98 - Other, specify _____ **ANCHOR**
- 99 - Don't remember **ANCHOR...EXCLUSIVE**

TOPICAL QUESTIONS

12. What do you remember about this ad?

- [RECORD]
- Don't remember

ASK ALL

13. On a scale of 1 to 5, How would you describe the overall health of your business right now? Is it...?

- | | | | | |
|-----------------------------------|----|----|----|-----------|
| Very poor | | | | Excellent |
| 01 | 02 | 03 | 04 | 05 |
| 99 - Don't know/prefer not to say | | | | |

14. What are the three biggest challenges currently facing your business?

SELECT UP TO THREE...RANDOMIZE

- 01 - Securing financing/loans
- 02 - Product development and testing
- 03 - Marketing/building customer base
- 04 - Hiring and employee retention
- 05 - Increasing productivity
- 06 - Increasing profitability
- 07 - Government regulations
- 08 - Responding to competitors
- 09 - Finding partnerships or mentorship
- 10 - Supply chain challenges/logistics
- 11 - Cost of goods and services
- 12 - Applying new technology to operations
- 13 - Cybersecurity
- 98 - Other, please specify: **ANCHOR**
- 14 - None, we have no challenges **ANCHOR...EXCLUSIVE**
- 99 - Don't know/prefer not to say **ANCHOR...EXCLUSIVE**

15. 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

- f) The Government of Canada understands the challenges facing Canadian businesses
- g) The Government of Canada offers a wide variety of programs to support Canadian businesses
- h) The Government of Canada has programs that support Canada’s small and medium sized businesses to develop an online presence (e.g., create a company website)
- i) The Government of Canada has programs that support Canada’s small and medium sized businesses to grow their online sales
- j) The Government of Canada has programs that support Canada’s small and medium sized businesses increase the use of digital technology into their business operations

16. 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

- h) Encouraging Canadian businesses to innovate
- i) Investing in infrastructure to move goods more efficiently
- j) Promoting and maintaining fair competition in the market
- k) Helping businesses access financing
- l) Investing in domestic manufacturing
- m) Improving access to high-speed internet for all Canadians
- n) 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

17. 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 job
- 02
- 03
- 04
- 05 – Very good job
- 99 - Don't know

- o) Encouraging Canadian businesses to innovate
- p) Investing in infrastructure to move goods more efficiently
- q) Promoting and maintaining fair competition in the market
- r) Helping businesses access financing
- s) Investing in domestic manufacturing
- t) Improving access to high-speed internet for all Canadians
- u) Promoting incentives that encourage businesses to invest in green technology
- v) Helping businesses adopt digital technologies
- w) Helping businesses access new markets
- x) Supporting regional economic development
- y) Having a competitive business tax regime
- z) Helping businesses protect and use their intellectual property for commercial success
- aa) Helping businesses to scale up
- bb) Improving the government’s online service experience for business

18. 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 - Very familiar
 - 02 - Somewhat familiar
 - 03 - Not very familiar, but have heard of it
 - 04 - Not at all familiar, never heard of it
- q) Accelerated Growth Service
 - r) Biomanufacturing
 - s) Black Entrepreneurship Program
 - t) Canada Small Business Financing Program
 - u) Clean Growth Hub
 - v) CyberSecure Canada
 - w) Global Innovation Clusters/Innovation Superclusters Initiative
 - x) Innovative Solutions Canada
 - y) Intellectual Property Strategy
 - z) Regional Economic Growth through Innovation
 - aa) Strategic Innovation Fund
 - bb) Venture Capital Catalyst Initiative
 - cc) The 50 – 30 Challenge
 - dd) Canada Business App
 - ee) The Business Benefits Finder Website
 - ff) GC Business Insights Newsletter/COVID-19 and Your Business Newsletter
 - gg) Canada Digital Adoption Program
 - hh) Canada Innovation Corporation

19. Does your company currently have a website ?

- 01 - Yes
- 02 - No **SKIP TO Q.21**

IF YES TO Q19, ASK Q20

20. Does your company's website have the ability to take online orders?

- 01 - Yes
- 02 - No
- 99 - Don't know

ASK ALL

21. Thinking about the next one to three years, how much of a priority are each of the following going to be for your business?

RANDOMIZE ...CAROUSEL

- 01 - Not at all a priority
 - 02 - A low priority
 - 03 - A medium priority
 - 04 - A high priority
 - 05 - Don't know/Not applicable to my business
- j) Increasing online sales.
 - k) Increasing its online presence (e.g., creating a business website, using social media, digital marketing)
 - l) Increasing digital technology in the area of human resources
 - m) Increasing digital technology in the area of production
 - n) Increasing digital technology in the area of shipping and receiving
 - o) Increasing digital technology in the area of accounting
 - p) Increasing digital technology in the area of marketing
 - q) Increasing digital technology in the area of manufacturing
 - r) Increasing digital technology in the area of cybersecurity

ASK ALL

22. Which of these challenges does your business face in growing your business online or growing your online sales, if any?

CHECK ALL THE APPLY...RANDOMIZE

- 01 - Issues with data protection and online security
 - 02 - Lack of knowledge of Internet technologies
 - 03 - Lack of knowledge of digital marketing
 - 04 - Logistical issues
 - 05 - Lack of internet connectivity
 - 06 - Issues with order processing
 - 07 - Challenges with taking online orders (e.g., credit card processing)
 - 08 - Issues with exporting outside of Canada
 - 09 - Hiring and retaining qualified talent
 - 10 - Available funds
 - 11 - None of these
 - 98 - Other, please specify: _____
- ANCHOR EXCLUSIVE
ANCHOR**

23a. To encourage small and medium businesses (SMEs) across the country to adopt digital technologies, the Government of Canada announced in Budget 2021, the Canada Digital Adoption Program (CDAP). CDAP offers digital adoption support to SMEs in any industry through two streams: smaller SMEs that need basic support to create digital storefronts and implement e-commerce; and the larger and/or more sophisticated SMEs looking to expand digital capabilities and improve productivity through digital transformation. Overall, how likely are you to seek out more information about the Canada Digital Adoption Program (CDAP)?

- 01 - Not likely at all/not applicable to my business
- 02 - Not very likely
- 03 - Somewhat likely
- 04 - Very likely

23b. From a business perspective, which of the following concepts best describes the term “digital adoption” for you?

CHECK ALL THE APPLY...RANDOMIZE

- 01 - Website/ E-commerce platforms
 - 02 - Digital marketing/advertising
 - 03 - Collaborative/Project management tools
 - 04 - Artificial intelligence (AI)
 - 05 - Mobile apps
 - 06 - Digital payment systems
 - 07 - Cloud computing
 - 08 - None of these
 - 98 - Other, please specify: _____
- ANCHOR EXCLUSIVE
ANCHOR**

24. How valuable are each of the following aspects of the Canada Digital Adoption Program to your business?

RANDOMIZE...CAROUSEL

- 01 - Not at all valuable/Not applicable
 - 02 - Not very valuable
 - 03 - Somewhat valuable
 - 04 - Very valuable
- b) Training and advisory services to increase your business’ online presence (e.g., help to create/improve a company website)
 - b) Training and advisory services to increase your business’ online sales
 - c) Training and advisory services to support your business incorporating more technology into its operations
 - d) Micro grants to support costs associated with technology adoption
 - e) Grants to pay for advisory services to develop a tailored digital adoption plan
 - f) Zero interest loans to implement technology into your business’ operations
 - g) Training and work opportunities for up to 28,000 young people to help businesses across Canada adopt new technology

25. How useful are each of the following types of information to your business right now.?

RANDOMIZE...CAROUSEL

- 01 - Not at all useful/Not applicable
- 02 - Not very useful
- 03 - Somewhat useful
- 04 - Very useful

- ~~l) Pandemic support information for businesses~~
- ~~m) COVID-19 outbreak updates~~
- ~~n) Federal rapid testing programs~~
- o) Workplace safety tips and tools
- ~~p) Vaccination resources for employers~~
- q) Updates on business conditions/outlooks
- r) Government of Canada and financing support programs
- s) Intellectual property information
- t) Small business statistics and Census data
- u) Cyber security
- v) Export tips and tools
- w) Credit insurance
- x) Mental health information
- y) Diversity and inclusion resources
- z) Digital adoption information
- aa) A directory of Government of Canada programs for businesses
- bb) Environmental sustainability resources
- cc) Tax information
- dd) The evolving state of Canadian manufacturing
- ee) Supply chain/logistics
- ff) Artificial intelligence

POST-CAMPAIGN ACET AIDED RECALL QUESTIONS

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 did you see, read or hear these ads?

SELECT ALL THAT APPLY...RANDOMIZE

- 01 - Website
- 02 - Magazines
- 03 - Newspaper (online)
- 04 - Billboards
- 05 - Digital Billboards
- 06 - Radio
- 07 - Twitter
- 08 - YouTube
- 09 - LinkedIn
- 10 - Spotify
- 11 - Google
- 12 - 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 know

T1K. 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 adopt digital technologies

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

SELECT ALL THAT APPLY...RANDOMIZE

- 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 LGBTQ2+ 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 **ANCHOR...EXCLUSIVE**
- 99 - Don't know / Prefer not to say **ANCHOR...EXCLUSIVE**

27 Do you identify with any of the groups below?

SELECT ALL THAT APPLY...RANDOMIZE

- 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 - LGBTQ2+ 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 **ANCHOR...EXCLUSIVE**
- 99 - Prefer not to say **ANCHOR...EXCLUSIVE**

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..

THNK2: We regret that your responses have shown you are ineligible to participate in this survey. Thank you for your time.