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**ecima** Research

## **IC** Quantitative Survey on the State of SMEs in Northern Ontario

Any questions regarding this report can be directed to:

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Ce rapport est également disponible en français.

Prepared for FedNor

Contract #: UT105-6-2456/001/CY

POR #: POR-429-06

Contract award date: February 21<sup>st</sup>, 2007

April 27<sup>th</sup>, 2007



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## Confidentiality

Any material or information provided by FedNor and all data collected by Decima will be treated as confidential by Decima and will be stored securely while on Decima's premise (adhering to industry standards and applicable laws).

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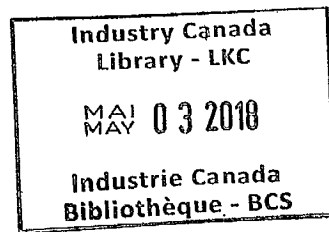
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#### A) Survey Instrument (English and French)



## Introduction

Decima is pleased to present the following summary report to FedNor, the federal regional development organization responsible for the economic prosperity of Northern Ontario which summarizes the results of a quantitative survey on the state of small and medium-sized enterprises (SMEs) in Northern Ontario.

The overall objective of the research survey was to examine the characteristics of SMEs in Northern Ontario. More specifically, the objectives were to:

- Explore the characteristics of Ontario's northern economies and markets;
- Explore the challenges and barriers to conducting business in Northern Ontario; and,
- Explore factors contributing to the economic success and potential growth of the region.

Decima conducted a 13 minute telephone survey with a random sample of senior level executives such as owners and presidents of SMEs in Northern Ontario. Four hundred and three (403) interviews were conducted between March 14<sup>th</sup> and 26<sup>th</sup>, 2007. And an additional 104 interviews were conducted between April 20<sup>th</sup> and 25<sup>th</sup>, 2007 in order to obtain additional interviews among SMEs in the manufacturing sector. The margin of error for a study of this size is +/- 4.1% nineteen times of twenty. Some results are based on smaller sub-segments of the total survey sample, and so the margin of error will be somewhat greater among these results.

For the purpose of this report, "very small companies" are defined as those having four employees or less, "small companies" are those with between five and 19 employees, while "mid-sized companies" are those with between 20 and 499 employees.

In addition, for the purposes of this report, Northern Ontario was defined by the Ontario Census Divisions. This geographical area includes the following:

- Muskoka;
- Nipissing;
- Parry Sound;
- Manitoulin;
- Sudbury and Sudbury Regional Municipality;
- Timiskaming;

- Cochrane;
- Algoma;
- Thunder Bay;
- Rainy River; and,
- Kenora.

Provided under separate cover is a set of detailed banner tables that present the results for all survey questions by various demographic breakdowns. In some tables and charts the percentages may not sum to exactly 100%, due to rounding.

## Research Findings

### **The Future Economic Prospects of SMEs in Northern Ontario**

**While individual SMEs state they are currently doing the same as compared to a year ago, a majority believe they will be doing “better” in two years.**

When asked if their business is doing “better,” “the same,” or “worse” as compared to a year ago, SMEs are about evenly split between saying their company is doing “worse” (30%) or doing “better” (30%). The plurality (37%) say they are doing “the same.”

Looking ahead two years, SME senior level executives tend to be somewhat more optimistic about their business. Roughly half (49%) believe their company will be doing “better,” compared to one in ten (12%) who believe it will be doing “worse.” One third (32%) believe their company will be doing “the same.”

Looking more closely at expectations for the next two years, seven in ten (68%) SMEs who say their company is doing “better” than a year ago, believe it will continue to do “better” over the next two years, as compared to just 1% who say it will do “worse.”

This positive trend is also seen among those SMEs who say their company is doing “worse” than a year ago. More specifically, 37% of those who say their company is doing “worse” expect it to be doing “better” two years from now.

### **Thinking specifically about the state of SMEs in Northern Ontario, over a third believe they will experience “bad times” over the next two years.**

Optimism about the future, however, seems to be limited to their own business. When asked to think specifically about the state of small and mid-size companies in Northern Ontario over the next two years, nearly four in ten (36%) believe SMEs will experience “bad times,” compared to one in five (23%) who believe they will experience “good times.” One quarter (27%) believe there will be “no real change.”

## Profiling SMEs in Northern Ontario

### SMEs in Northern Ontario derive their revenue primarily from services.

Six in ten (63%) of SME senior level executives report that their company derives their revenues primarily from services. In contrast, nearly one in five (16%) report their revenues are primarily derived from goods.

### The majority of SMEs say the bulk of their revenue comes from more than 100 km of their location.

Although Northern Ontario is the single largest market for SMEs, with senior level executives reporting that the largest percentage of their revenues at 46% come from within 100 km of where they are located, over half (58%) come from more than 100 km of their location. More specifically, 18% of their revenues come from the U.S., 18% come from farther than 100 km, but still in Northern Ontario, 14% come from the rest of Ontario, 6% from the rest of Canada and 2% from outside of Canada and the U.S.

The following table illustrates the percentage breakdown of revenues for each area.

Percentage of Total Revenues	Area					
	Within 100 km %	Farther than 100 km, but still Northern Ontario %	Rest of Ontario %	Rest of Canada %	U.S. %	Outside Canada and the U.S. %
76-100%	30	4	3	1	12	-
51-75%	11	4	7	1	2	1
26-50%	13	14	6	4	6	1
1-25%	26	44	32	31	25	18
0%	16	30	47	60	51	75
Mean Percent	46	18	14	6	18	2



**A majority of SMEs expect revenues coming from outside of Northern Ontario to “remain the same” in 2007.**

When asked if they expect their revenues coming from outside Northern Ontario to “increase,” “decrease,” or “remain the same” in 2007, a majority (53%) of senior level executives expect them to “remain the same.” Three in ten (29%) believe they will “increase,” while one in ten (12%) believe they will “decrease.”

In addition, those who expect their revenues coming from outside of Northern Ontario to “increase” in 2007 believe they will do so by 21%.

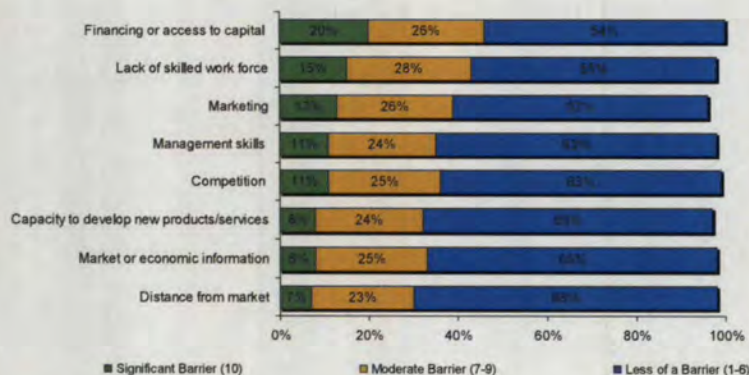
**Most SMEs would prefer their business to grow over the next two years.**

SME senior level executives were then asked if in the next two years they would prefer to grow or not grow their business. The vast majority (86%) say they would prefer their business to grow, as compared to one in ten (12%) who say they would prefer not to grow.

Among those who say they would prefer to grow, “financing or access to capital” is cited as the most significant barrier to growth (20%), followed by “lack of a skilled work force” (15%). Less often respondents cite “marketing” (13%), “management skills” (11%) and “competition” (11%). Meanwhile “capacity to develop new products/services” (8%), “market or economic information” (8%) and “distance to market” (7%) are least likely to be cited as significant barriers to growth.

**Barriers to Growth**

Using a 1 to 10 scale, where 1 is not at all a barrier to growth and 10 is a significant barrier to growth, how significant a barrier are each of the following to growing your business over the next two years?



## Keys to Success in Northern Ontario

**“Retaining employees” is the most important factor to the success of SMEs in Northern Ontario.**

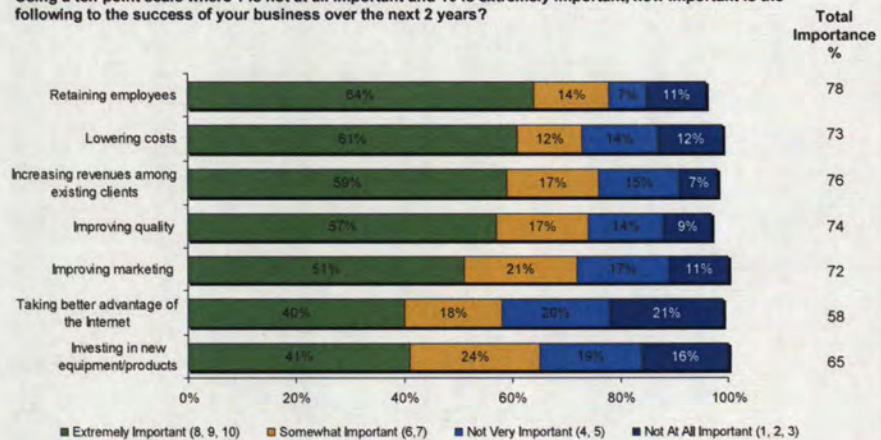
SME senior level executives were then asked to indicate which factors would be most important to the success of their business over the next two years.

“Retaining employees” is the most important factor to the success of SMEs in Northern Ontario, with three-quarters saying it is important – six in ten of which say it is “extremely important.”

More than half also assign high importance to “lowering costs” (61% extremely important), “increasing revenues among existing clients” (59%), “improving quality” (57%) and “improving marketing” (51%).

### Factors Important to the Success of Business – Top Tier

Using a ten-point scale where 1 is not at all important and 10 is extremely important, how important is the following to the success of your business over the next 2 years?

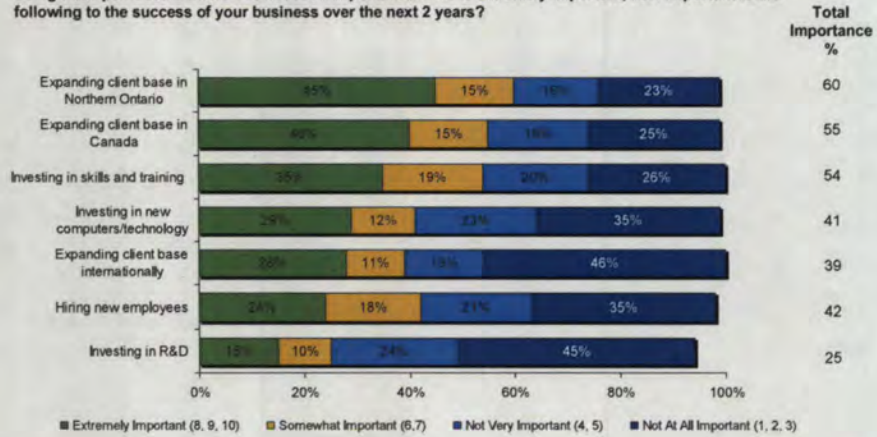


The importance of each of the factors listed seems to be correlated to company size. Larger companies tend to assign higher levels of importance to each of the factors.

In contrast, senior level executives are least likely to assign importance to “investing in R&D” (25% total importance). “Expanding client base internationally” (39%), “investing in new technology” (41%) and “hiring new employees” (42%) are also assigned a lower importance by SMEs, with roughly four in ten saying each of these factors are either “extremely” or “somewhat important.”

**Factors Important to the Success of Business – Bottom Tier**

Using a ten-point scale where 1 is not at all important and 10 is extremely important, how important is the following to the success of your business over the next 2 years?



**Information Technology**

**A vast majority of SMEs use the Internet and have a company website.**

Nearly nine in ten (84%) SMEs in Northern Ontario use the Internet. Among the SMEs who use the Internet, eight in ten (79%) have a company website.

**Three in ten SMEs report goods and services can be purchased from their company website, with 21% of revenues coming from online transactions.**

Among those SMEs who have a website, three in ten (30%) report that clients are able to purchase goods and services from the website, as compared to seven in ten (69%) who report they cannot.

Furthermore, among the SMEs who have company websites where clients are able to purchase goods and services online, senior level executives report that approximately 21% of their revenues come from online transactions.

**Among SMEs who use the Internet, half (51%) report they make purchases online, while the other half report they don't (48%).** And among those who do make purchases online, approximately 15% of their purchases are made in this manner.

## **Research & Development**

### **Over half of SMEs do not see R&D as a benefit to their company.**

Nearly two thirds (65%) say R&D is not a benefit to their company, almost one quarter (23%) of which say it is "of no benefit." One in five (21%) say it is a "very significant benefit" and an additional one in ten (13%) say it is "somewhat of a benefit."

### **Over half of SMEs in Northern Ontario are unlikely to invest in R&D.**

Given the low levels of perceived R&D benefit to SMEs, it is not surprising that two thirds (63%) say their company is "not very likely" (24%) or "not at all likely" (39%) to invest in R&D in the next twelve months. Over one third (36%), however, say they are either "very likely" (17%) or "somewhat likely" (19%).

Among those who believe R&D can benefit their business, but say it is unlikely they will invest in it, the single most frequently cited reason is "lack of finances" (n=8). Less frequently, SMEs mention "currently happy with their situation" (n=6), they "don't see any benefit" (n=3) and "lack of time" (n=1).

When asked if their company had developed any new products over the last three years, two thirds (66%) of SMEs report they have not developed any new products. Among those that have, 11% say they have developed between 1 and 2 new products, 7% say they have developed between 3 and 4 new products and 11% say they have developed 5 or more.

Among those companies who do report they have developed a new product in the last three years, at least 18% have patented at least one new product.

## SMEs Profile

Below are tables illustrating the demographics of the SMEs who were interviewed.

	Sample size	Percentage
<b>Number of Employees</b>	<b>403</b>	<b>100%</b>
1-4	159	39
5-9	100	25
10-19	84	21
20-49	32	8
50-99	16	4
100-249	9	2
250-499	3	1

	Sample size	Percentage
<b>Years Owned/Managed Business</b>	<b>403</b>	<b>100%</b>
Less than a year	2	1
1-4	70	17
5-9	72	18
10-14	65	16
15-19	55	14
20-29	71	18
30 or more	63	16
Don't know	5	1
Mean years	403	<b>16.2</b>

	Sample size	Percentage
<b>Number of New Hires for 2007</b>	<b>403</b>	<b>100%</b>
Zero	207	51
1-25	175	43
26 or more	3	-
Don't know/Refused	18	4

	Sample size	Percentage
<b>Member of Industry/Trade Association</b>	<b>403</b>	<b>100%</b>
Yes	216	54
No	177	44
Don't know	10	2

	Sample size	Percentage
<b>Number of Direct Competitors</b>	<b>403</b>	<b>100%</b>
Do not have any direct competitors	29	7
1-25	240	60
26-50	29	7
51 or more	48	12
Don't know	57	14
Mean number of direct competitors	403	153

	Sample size	Mean Number
<b>Location of Direct Competitors</b>		
In the local community, within 100 Km	374	31.1
Outside the local community, but in N. Ontario (Muskoka to Manitoba border)	374	104.1
Outside of Northern Ontario, but within Canada	374	114.1
Outside of Canada	374	405.3

	Sample size	Percentage
<b>Source of Sales</b>		
Products or services company creates or provides	403	85.7
Products or services from a subcontractor	403	14.4

	Sample size	Mean
<b>Revenues for 2005 Fiscal Year</b>	<b>403</b>	<b>100%</b>
Less than \$50,000	46	12
\$50,000 - \$99,999	23	6
\$100,000 - \$249,999	33	8
\$250,000 - \$499,999	30	8
\$500,000 - \$749,999	19	5
\$750,000 - \$999,999	13	3
\$1 million or more	65	16
Don't know	173	43

	Sample size	Percentage
<b>Revenues for 2006 Fiscal Year</b>	<b>403</b>	<b>100%</b>
Less than \$50,000	39	10
\$50,000 - \$99,999	23	6
\$100,000 - \$249,999	33	8
\$250,000 - \$499,999	29	7
\$500,000 - \$749,999	19	5
\$750,000 - \$999,999	11	3
\$1 million or more	75	19
Don't know	175	43

	Sample size	Percentage
<b>Expected Revenues for 2007 Fiscal Year</b>	<b>403</b>	<b>100%</b>
Less than \$50,000	41	10
\$50,000 - \$99,999	27	7
\$100,000 - \$249,999	32	8
\$250,000 - \$499,999	28	7
\$500,000 - \$749,999	21	5
\$750,000 - \$999,999	13	3
\$1 million or more	73	18
Don't know	170	42

	Sample size	Percentage
<b>Industry</b>	<b>403</b>	<b>100%</b>
Accommodation/Food Services/Tourism	157	39
Manufacturing	40	10
Agriculture/Fishing/Hunting/Forestry	37	9
Oil/Gas/Mining	31	8
Construction	21	5
Professional, Scientific and Technical Services	19	5
Transportation and Warehousing	17	4
Art/Entertainment/Recreation	10	3
Retail Trade	10	2
Engineering	5	1
Industrial	4	1
Consulting	4	1
Service	3	1
Waste Management	3	1
Utilities	3	1

Finance and Insurance/Real Estate and Rental	2	1
Other	25	6
Don't know/Refused	8	2

	Sample size	Percentage
<b>Region</b>	<b>403</b>	<b>100%</b>
Nipissing District	40	10
Parry Sound District	37	9
Manitoulin	9	2
Sudbury District	12	3
Greater Sudbury District	48	12
Temiskaming District	27	7
Cochrane District	32	8
Algoma District	42	10
Thunder Bay District	58	14
Rainy River District	5	1
Kenora District	46	11
Muskoka	29	7
Unknown	18	4



**APPENDIX A: Survey Instrument (English and French)****Screening**

Hello, my name is \_\_\_\_\_ and I am calling from Decima Research which has been contracted by FedNor, the federal regional economic development organization for Northern Ontario, to assess the business environment in the region. We are conducting a very short survey approximately 8 minutes in length among small and medium-sized businesses (SMEs) located in Northern Ontario to gather information on key factors which contribute to business growth and competitiveness in today's economy. The results of the survey will help guide the development of FedNor policies and programs supporting SMEs in Northern Ontario. **May I speak with the owner or President of your company?**

INTERVIEWER: CONFIRM YOU ARE SPEAKING TO THE RIGHT INDIVIDUAL AND READ: I understand that you are the owner or President of (COMPANY NAME). Is that correct?

I assure you that we are not trying to sell you anything. The information you provide will be used for research purposes only and will be administered in accordance with the applicable privacy laws.

Is now a convenient time to speak with you?

Yes	<b>CONTINUE</b>
No, not convenient	<b>SCHEDULE CALLBACK OR INFORM RESPONDENT THAT THEY CAN RESPOND ONLINE</b>
No, not interested	<b>THANK AND TERMINATE</b>

Before we proceed, I would just like to inform you that this study has been registered with the

Canadian Survey Research Council.

[INTERVIEWER: IF RESPONDENT QUESTIONS OR WANTS TO MORE ABOUT REGISTRATION PROCESS] The registration system has been created by the survey research industry to allow the public to verify that a survey is legitimate, get information about the survey industry or register a complaint. The registration system's toll-free number is 1-800-554-9996.

[INTERVIEWER: **ONLY** IF RESPONDENT QUESTIONS THE VALIDITY OF THE RESEARCH AT ANY TIME THROUGHOUT THE SURVEY] The survey is being sponsored by FedNor, if you have any questions on the

survey you may contact Normand Laframboise of the Government of Canada at 1-613-947-2596.

Which of the following best describes your title?

- Owner
  - President
  - Senior executive
  - Other [specify]
  - Refuse
- DO NOT READ  
THANK AND TERMINATE**

### Characteristics of Business

1. Approximately how many employees, including yourself does your company employ? This would include all full-time and permanent part-time staff? **DO NOT READ LIST – ACCEPT ONLY ONE RESPONSE**

1 - 4	1	
5 - 9	2	
10 - 19	3	
20 - 49	4	
50 - 99	5	
100 - 249	6	
250 – 499	7	
500 or more	8	<b>THANK AND TERMINATE</b>
Refused/Prefer not to say	9	<b>THANK AND TERMINATE</b>

### Confidence Questions

2. Would you say that your business is doing better, worse or about the same as compared to a year ago?

Better	1	
Worse	2	
The same	3	
Don't know	9	

3. And looking ahead, do you think that two years from now your company will be doing better, worse or about the same?

Better	1	
Worse	2	
The same	3	
Don't know	9	

4. Now thinking specifically of small to mid-size companies in Northern Ontario, do you think they will experience good times, bad times or no real change over the next 2 years?

Good times	1	
Bad times	2	
No real change	3	
Both good and bad times	4	<b>(VOLUNTEERED)</b>
Uncertain	5	<b>(VOLUNTEERED)</b>
Depends	6	<b>(VOLUNTEERED)</b>
Don't know	9	<b>DO NOT READ</b>

### Revenues/Business

5. Are your company's revenues primarily derived from goods or services?

Goods	1	
Services	2	
Both	3	
Don't know/Not sure	9	<b>DO NOT READ</b>

6. What percentage of your revenues come from within 100km of you, farther than 100km from you, but still in Northern Ontario, the rest of Ontario, the rest of Canada, the U.S. and outside of Canada and the U.S? (READ FULL LIST BEFORE ACCEPTING A RESPONSE TO ENSURE RESPONDENT KNOWS ALL THE CATEGORIES)

Within 100 Km of you  
 Farther than 100 Km from you, but still in Northern Ontario  
 Rest of Ontario  
 Rest of Canada  
 U.S  
 Outside of Canada and the U.S.

7. Do you expect your revenues coming from outside Northern Ontario to increase, decrease or remain the same in 2007?

Increase	1	
Decrease	2	
Remain the same	3	
Don't know/Not sure	9	<b>DO NOT READ</b>

8. (IF INCREASE IN Q7) And what percentage increase do you expect in revenues coming from outside Northern Ontario in 2007?  
**OPEN PERCENT**

9. How many new employees is your company likely to hire in 2007?  
**RECORD NUMBER**

Don't know/Not sure

9

**DO NOT READ**

### Keys to Success

10. Using a ten-point scale where 1 is not at all important and 10 is extremely important, how important is the following to the success of your business over the next 2 years? **RANDOMIZE LIST**

Expanding client base in Northern Ontario  
Expanding client base in Canada  
Expanding client base internationally  
Investing in R&D  
Investing in skills and training  
Increasing revenues among existing clients  
Retaining employees  
Taking better advantage of the Internet  
Investing in new computers/technology  
Investing in new equipment/products  
Improving marketing  
Hiring new employees  
Lowering costs  
Improving quality

12. And over the next two years, would you prefer to grow your business or not grow your business?

Prefer to grow  
Prefer not to grow  
Don't know

13. (IF PREFER TO GROW BUSINESS IN Q12) Using a 1 to 10 scale, where 1 is not at all a barrier to growth and 10 is a significant barrier to growth, how significant a barrier are each of the following to growing your business over the next 2 years?

Financing or Access to Capital  
Lack of a skilled work force

Distance from target markets  
Marketing  
Market or Economic Information  
Capacity to develop new products/services  
Management Skills  
Competition

### Information Technology

14. Does your business use the Internet?

Yes	1	
No	2	
Don't know/Not sure	9	<b>DO NOT READ</b>

15. (IF USE INTERNET IN Q14) Does your company have a website?

Yes	1	
No	2	
Don't know/Not sure	9	<b>DO NOT READ</b>

16. (IF HAVE WEBSITE IN Q15) Are clients able to purchase goods and services from your website?

Yes	1	
No	2	
Don't know/Not sure	9	<b>DO NOT READ</b>

17. (IF CLIENTS CAN PURCHASE ONLINE IN Q16) Roughly speaking, what proportion of revenues comes from online transactions? **OPEN PERCENT**

Don't know/Not sure	9	<b>DO NOT READ</b>
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18. (IF USE INTERNET IN Q14) Does your company make purchases online?

Yes	1	
No	2	
Don't know/Not sure	9	<b>DO NOT READ</b>

19. (IF YES IN Q18) And approximately what percentage of the purchases your company makes comes from online transactions?  
**OPEN PERCENT**

Don't know/Not sure                      9                      **DO NOT READ**

**Research & Development**

20. Thinking of the last 3 years, how many new products has your company developed? **RECORD NUMBER**

Do not develop products                      1  
 Don't know/Not sure                      9                      **DO NOT READ**

21. (IF AT LEAST 1 IN Q20) And, how many were patented?  
**RECORD NUMBER**

Don't know/Not sure                      9                      **DO NOT READ**

22. On a ten-point scale where 1 is of no benefit and 10 is of very significant benefit, how much of a benefit is research and development, also known as R&D, to your company?

23. How likely is your company to invest in R&D in the next 12 months?

Very likely                      1  
 Somewhat likely                      2  
 Not very likely                      3  
 Not at all likely                      4  
 Don't know                      9

24. (IF SAY 6-10 IN BENEFIT (Q22) AND 3 OR 4 IN LIKELIHOOD (Q23)) What are the reasons why your company will not invest in R&D? **OPEN END**

**Demographics**

To finish up, I would like to ask you a few questions for statistical purposes. Please be assured that your answers will remain completely confidential.

25. How many years have you owned or managed your business?  
**RECORD NUMBER**

Don't know/Not sure 9 **DO NOT READ**

**INTERVIEWER NOTE:** Please do the math for the respondent if they provide a year ex. 1972

26. Does your company belong to an industry association or trade association?

Yes 1

No 2

Don't know/Not sure 9 **DO NOT READ**

27. How many direct competitors does your business have? **RECORD NUMBER**

Don't know/Not sure 9 **DO NOT READ**

**INTERVIEWER NOTE IF NECESSARY:** By direct competitors we mean those businesses who compete for the same customers as you do.

28. (IF Q27 NOT ZERO) Roughly how many of those competitors are located ...

- a) In the local community, within 100 kilometres distance
- b) Outside the local community but in northern Ontario (Muskoka to Manitoba border)
- c) Outside of northern Ontario but within Canada
- d) Outside of Canada

29. What percentage of your sales are derived from...(READ LIST BEFORE ACCEPTING ANY ANSWERS)

Products or services your company creates or provides  
Products or services of a subcontractor

30. What was your company's revenue for the fiscal that ended during 2006? **RECORD DOLLAR VALUE**

Refused/Prefer not to say 99

30A. (IF REFUSED IN Q30) Can you tell me whether your revenues increased or decreased from 2005 to 2006?

Increase  
Decreased  
No change (VOLUNTEERED)  
Don't know/Refused

30b (IF INCREASED OR DECREASED IN Q30A) By what percentage did your revenues (increase or decrease) from 2005 to 2006?  
**RECORDED PERCENT**

31. And what was your company's revenue for the fiscal year that ended during 2005? **RECORD DOLLAR VALUE**

Refused/Prefer not to say 99

32. What is your projected revenue for this current fiscal year which will end during 2007? **RECORD DOLLAR VALUE**

Refused/Prefer not to say 9

32A. (IF REFUSED IN Q32) Do you expect your revenues to increase or decrease from 2006 to 2007?

Increase  
Decreased  
No change  
Don't know/Refused

32B. (IF INCREASE OR DECREASE IN Q32A) By what percentage do you expect your revenues to (increase or decrease) from 2006 to 2007? **RECORD PERCENT**



33. 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.)

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

34. REGION [DO NOT ASK – RECORD]

35. LANGUAGE [DO NOT ASK – RECORD]

36. GENDER OF RESPONDENT [DO NOT ASK - RECORD]

Male	1
Female	2

Those are all the questions I have for you. I thank you very much for your time and co-operation and have a pleasant day / evening.

**Questions de sélection**

Bonjour, je m'appelle \_\_\_\_\_ et je vous téléphone du Centre de recherche Décima. Nous avons été mandatés par FedNor, l'organisme fédéral de développement économique régional du Nord de l'Ontario, pour évaluer le milieu des affaires de la région. Nous effectuons un très court sondage d'environ 8 minutes auprès des petites et moyennes entreprises (PME) situées dans le Nord de l'Ontario pour obtenir des renseignements sur les facteurs clés qui favorisent la croissance et la capacité concurrentielle des entreprises dans l'économie d'aujourd'hui. Les résultats de l'étude aideront FedNor à orienter les politiques et les programmes élaborés pour soutenir les PME du Nord de l'Ontario. **Puis-je parler au propriétaire ou au président de votre entreprise?**

INTERVIEWEUR : POUR VOUS ASSURER QUE VOUS PARLEZ À LA BONNE PERSONNE, LISEZ : Si j'ai bien compris, vous êtes le(la) propriétaire ou le(la) président(e) de (NOM DE L'ENTREPRISE). Est-ce exact?

Soyez assuré(e) que nous ne tenterons pas de vous vendre quoi que ce soit. Les renseignements que vous fournirez ne serviront qu'à des fins de recherche et seront traités conformément aux lois sur la protection des renseignements personnels.

Est-ce un bon moment pour vous parler?

Oui  
Non, pas un bon moment

**CONTINUEZ  
PRENEZ RENDEZ-VOUS POUR LE  
RAPPEL OU INFORMEZ LE  
RÉPONDANT QU'IL PEUT  
COMPLÉTER LE SONDAJE EN  
LIGNE**

Non, pas intéressé(e)

**REMERCIEZ ET TERMINEZ**

Avant de commencer, j'aimerais simplement vous informer que cette étude est enregistrée auprès de l'Association de recherche et d'intelligence marketing.

[INTERVIEWEUR : SI LE RÉPONDANT A DES DOUTES OU VEUT EN SAVOIR PLUS SUR LE PROCESSUS D'ENREGISTREMENT.] Le système d'enregistrement a été mis sur pied par l'industrie canadienne de recherche par sondages de façon à permettre au public de vérifier la légitimité d'un sondage, d'obtenir des renseignements sur l'industrie des sondages ou de formuler une plainte. Pour joindre le système d'enregistrement des sondages, composez sans frais le 1 800 554-9996.

[INTERVIEWEUR : **SEULEMENT** SI LE RÉPONDANT REMET EN QUESTION LA VALIDITÉ DE L'ÉTUDE À N'IMPORTE QUEL MOMENT PENDANT LE SONDAGE.] Le sondage est commandité par FedNor. Pour toute question sur le sondage, vous pouvez communiquer avec Normand Laframboise du gouvernement du Canada au 1 613 947-2596.

Parmi les options suivantes, laquelle désigne le mieux votre appellation d'emploi?

- Propriétaire
- Président(e)
- Dirigeant(e)
- Autre [veuillez préciser]      **NE LISEZ PAS**
- Refuse      **REMERCIEZ ET TERMINEZ**

### Caractéristiques de l'entreprise

1. Vous y compris, environ combien d'employés votre entreprise compte-t-elle? Veuillez inclure tous les employés permanents à temps plein et à temps partiel. **NE LISEZ PAS LA LISTE. ACCEPTEZ UNE SEULE RÉPONSE.**

- |                                |   |                     |
|--------------------------------|---|---------------------|
| 1 - 4                          | 1 |                     |
| 5 - 9                          | 2 |                     |
| 10 - 19                        | 3 |                     |
| 20 - 49                        | 4 |                     |
| 50 - 99                        | 5 |                     |
| 100 - 249                      | 6 |                     |
| 250 - 499                      | 7 |                     |
| 500 ou plus                    | 8 | <b>REMERCIEZ ET</b> |
|                                |   | <b>TERMINEZ</b>     |
| Refuse/Préfère ne pas répondre | 9 | <b>REMERCIEZ ET</b> |
|                                |   | <b>TERMINEZ</b>     |

### Questions sur la confiance

2. Par rapport à l'an dernier, diriez-vous que la situation de votre entreprise s'est améliorée, s'est détériorée ou qu'elle est demeurée sensiblement la même?

- |                  |   |
|------------------|---|
| S'est améliorée  | 1 |
| S'est détériorée | 2 |
| La même          | 3 |
| Ne sait pas      | 9 |

3. En perspective, d'ici deux ans, croyez-vous que la situation de votre entreprise s'améliorera, se détériorera ou qu'elle demeurera sensiblement la même?

S'améliorera	1
Se détériorera	2
La même	3
Ne sait pas	9

4. Maintenant, en songeant précisément aux petites et moyennes entreprises du Nord de l'Ontario, croyez-vous qu'elles vivront des périodes prospères, creuses, ou qu'il n'y aura pas de réel changement au cours des 2 prochaines années?

Périodes prospères	1	
Périodes creuses	2	
Pas de réel changement	3	
Des périodes prospères et difficiles	4	(SPONTANÉMENT)
Incertain(e)	5	(SPONTANÉMENT)
Cela dépend	6	(SPONTANÉMENT)
Ne sait pas	9	<b>NE LISEZ PAS</b>

#### Revenus/Entreprise

5. Les revenus de votre entreprise proviennent-ils principalement de la vente de biens ou de services?

Biens	1	
Services	2	
Les deux	3	
Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>

6. Quel pourcentage de vos revenus tirez-vous à moins de 100 km de votre entreprise, à plus de 100 km de votre entreprise, mais quand même dans le Nord de l'Ontario, ailleurs en Ontario, ailleurs au Canada, aux États-Unis et ailleurs qu'au Canada et aux États-Unis? (LISEZ LA LISTE AU COMPLET AVANT D'ACCEPTER UNE RÉPONSE POUR VOUS ASSURER QUE LE RÉPONDANT CONNAISSE TOUS LES CHOIX.)

À 100 km et moins de votre entreprise  
À plus de 100 km de votre entreprise, mais tout de même dans le Nord de l'Ontario  
Ailleurs en Ontario  
Ailleurs au Canada  
Aux États-Unis  
Ailleurs qu'au Canada et aux États-Unis

7. Vous attendez-vous à ce que les revenus que vous tirez ailleurs que dans le Nord de l'Ontario augmentent, diminuent ou demeurent sensiblement les mêmes en 2007?

Augmentent	1	
Diminuent	2	
Demeurent les mêmes	3	
Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>

8. (SI « AUGMENTENT » À Q7) Et à quel pourcentage d'augmentation vous attendez-vous en 2007 pour les revenus que vous tirez ailleurs que du Nord de l'Ontario? **POURCENTAGE OUVERT**

9. Combien de nouveaux employés votre entreprise devra-t-elle probablement embaucher en 2007? **ENTREZ LE NOMBRE**

Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>
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#### Facteurs de réussite

10. Sur une échelle de 1 à 10, où 1 signifie « pas du tout important » et 10, « extrêmement important », dans quelle mesure les facteurs suivants sont-ils importants pour la réussite de votre entreprise au cours des 2 prochaines années? **PRÉSENTEZ LES ÉNONCÉS DE FAÇON ALÉATOIRE.**

Accroître la clientèle dans le Nord de l'Ontario  
Accroître la clientèle au Canada  
Accroître la clientèle à l'échelle internationale  
Investir en recherche et développement  
Investir dans le développement des compétences et dans la formation  
Augmenter les revenus qui proviennent de la clientèle actuelle  
Maintenir les employés en poste  
Mieux profiter d'Internet  
Investir dans de nouveaux ordinateurs/dans la technologie

Investir dans du nouvel équipement/de nouveaux produits  
 Améliorer le marketing  
 Embaucher de nouveaux employés  
 Diminuer les coûts  
 Augmenter la qualité

12. Et au cours des deux prochaines années, préférez-vous accroître votre entreprise ou ne pas l'accroître?

Préfère accroître son entreprise  
 Préfère ne pas accroître son entreprise  
 Ne sait pas

13. (SI PRÉFÈRE ACCROÎTRE SON ENTREPRISE À Q12) Sur une échelle de 1 à 10, où 1 signifie que ce n'est « pas du tout un obstacle » et 10, que c'est « un obstacle important », pour les 2 prochaines années, dans quelle mesure les éléments suivants représentent-ils des obstacles importants à la croissance de votre entreprise?

Financement ou accès à du capital  
 Manque de main-d'œuvre qualifiée  
 Distance des marchés cibles  
 Marketing  
 Renseignements sur le marché ou sur l'économie  
 Capacité à développer de nouveaux produits/services  
 Compétences en gestion  
 Concurrence

### Technologie de l'information

14. Votre entreprise utilise-t-elle Internet?

Oui	1	
Non	2	
Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>

15. (SI UTILISE INTERNET À Q14) Votre entreprise a-t-elle un site Web?

Oui	1	
Non	2	
Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>

16. (SI A UN SITE WEB À Q15) Vos clients peuvent-ils acheter des biens et des services sur votre site Web?

Oui	1	
Non	2	
Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>

17. (SI LES CLIENTS PEUVENT ACHETER EN LIGNE À Q16) Environ quel pourcentage de vos revenus provient de transactions en ligne? **POURCENTAGE OUVERT**

Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>
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18. (SI UTILISE INTERNET À Q14) Votre entreprise fait-elle des achats en ligne?

Oui	1	
Non	2	
Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>

19. (SI OUI À Q18) Et environ quel pourcentage des achats de votre entreprise sont faits en ligne? **POURCENTAGE OUVERT**

Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>
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### Recherche et développement

20. Au cours des 3 dernières années, combien de nouveaux produits votre entreprise a-t-elle développés? **ENTREZ LE NOMBRE**

Ne développe pas de produits	1	
Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>

21. (SI AU MOINS 1 À Q20) Et combien d'entre eux ont été brevetés? **ENTREZ LE NOMBRE**

Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>
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22. Sur une échelle de 10 points, où 1 signifie « aucun avantage » et 10, « un avantage important », dans quelle mesure la recherche et développement, également appelée R. et D., représente-elle un avantage pour votre entreprise?

23. Dans quelle mesure est-il probable que votre entreprise investisse en R. et D. au cours des 12 prochains mois?

Très probable	1
Plutôt probable	2
Pas très probable	3
Pas du tout probable	4
Ne sait pas	9

24. (SI RÉPOND 6-10 POUR L'AVANTAGE (Q22) ET 3 OU 4 POUR LA PROBABILITÉ (Q23)) Pour quelles raisons votre entreprise n'investira-t-elle pas en R. et D.? **RÉPONSE OUVERTE**

### Questions démographiques

Pour terminer, j'aimerais vous poser quelques questions à des fins statistiques. Soyez assuré(e) que vos réponses demeureront strictement confidentielles.

25. Depuis combien d'années êtes-vous propriétaire ou gestionnaire de votre entreprise? **ENTREZ LE NOMBRE**

Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>
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NOTE À L'INTERVIEWEUR : Si le répondant vous donne une année (p. ex., 1972), faites le calcul vous-même.

26. Votre entreprise fait-elle partie d'une association industrielle ou d'une association commerciale?

Oui	1	
Non	2	
Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>

27. Combien de concurrents directs votre entreprise a-t-elle? **ENTREZ LE NOMBRE**

Ne sait pas/Incertain(e)	9	<b>NE LISEZ PAS</b>
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**AU BESOIN, NOTE À L'INTERVIEWEUR : Par concurrents directs, nous entendons les entreprises qui sont en concurrence avec vous pour la même clientèle.**

28. (SI Q27≠ZÉRO) Environ combien de ces concurrents sont situés...

- Dans la communauté, à moins de 100 km
- À l'extérieur de la communauté, mais dans le Nord de l'Ontario (de Muskoka à la frontière du Manitoba)
- Ailleurs que dans le Nord de l'Ontario, mais au Canada



d) Ailleurs qu'au Canada

29. Quel pourcentage de vos ventes provient de... (LISEZ LA LISTE AVANT D'ACCEPTER UNE RÉPONSE.)

Produits ou de services développés ou commercialisés par votre entreprise  
Produits ou de services d'un sous-traitant

30. Quel a été le revenu de votre entreprise pour l'année financière qui s'est terminée en 2006? **ENTREZ LA RÉPONSE EN DOLLARS.**

Refuse/Préfère ne pas répondre 99

30A. (SI REFUSE À Q30) Pouvez-vous me dire si le revenu de votre entreprise a augmenté ou diminué en 2006 par rapport à 2005?

A augmenté  
A diminué  
Est demeuré inchangé (SPONTANÉMENT)  
Ne sait pas/Refuse

30b (SI A AUGMENTÉ OU A DIMINUÉ À Q30A) De quel pourcentage votre revenu a-t-il (augmenté ou diminué) en 2006 par rapport à 2005? **ENTREZ LE POURCENTAGE.**

31. Et quel a été le revenu de votre entreprise pour l'année financière qui s'est terminée en 2005? **ENTREZ LA RÉPONSE EN DOLLARS.**

Refuse/Préfère ne pas répondre 99

32. Quel est le revenu prévu pour l'année financière actuelle, qui se terminera en 2007? **ENTREZ LA RÉPONSE EN DOLLARS.**

Refuse/Préfère ne pas répondre 99

32A. (SI REFUSE À Q32) Vous attendez-vous à ce que le revenu de votre entreprise augmente ou diminue de 2006 à 2007?

Augmente  
Diminue  
Ne changera pas

Ne sait pas/Refuse

32B. (SI AUGMENTE OU DIMINUE À Q32A) De quel pourcentage vous attendez-vous à ce que votre revenu (augmente ou diminue) de 2006 à 2007? **ENTREZ LE POURCENTAGE.**

33. Quel est le secteur d'activité de votre entreprise? Si votre entreprise œuvre dans plus d'un secteur, veuillez choisir le secteur d'activité principal. (NE LISEZ PAS LA LISTE. ACCEPTEZ UNE SEULE RÉPONSE. AU BESOIN, CONFIRMEZ LA RÉPONSE AVEC LE RÉPONDANT.)

Agriculture, forêts, chasse et pêche  
Exploitation minière, pétrolière ou gazière  
Services publics  
Construction  
Fabrication  
Commerce de gros  
Commerce de détail  
Transport et entreposage  
Industrie de l'information ou de la culture  
Finances et assurances/vente et location d'immobilier  
Services professionnels, scientifiques ou techniques  
Gestion d'entreprises et de sociétés  
Soutien administratif  
Gestion des déchets  
Services d'assainissement  
Arts, spectacles et loisirs  
Hébergement, restauration ou tourisme  
Autre (veuillez préciser)

34. RÉGION [**NE DEMANDEZ PAS. ENTREZ.**]

35. LANGUE [**NE DEMANDEZ PAS. ENTREZ.**]

36. SEXE DU RÉPONDANT [**NE DEMANDEZ PAS. ENTREZ.**]

Homme	1
Femme	2

C'était ma dernière question. Je vous remercie de votre collaboration et du temps que vous m'avez accordé. Bonne journée / soirée.

