Evaluation of the Small- and Medium-Sized Enterprises Conferences and InfoFairs

Final Report

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CHAPTER

1 INTRODUCTION

1.1 Background and Context

Building on the Small- and Medium-Sized Enterprise (SME) Conferences and InfoFairs held during 1997, the Industry Portfolio hosted 23 additional events during 1998, with a focus on smaller centres.

The broad objectives of the events were to increase federal visibility and showcase the range of government services available to SMEs. Each event included: a by-invitation conference (which included a Ministerial presentation and featured successful local entrepreneurs); an open to the public InfoFair with a number of exhibitors from federal departments and agencies; and seminars focusing on a variety of SME issues.

Ekos Research Associates has been commissioned to undertake this evaluation of the extent to which attendees and exhibitors felt the events have met their needs. A report on the spring wave of events was provided to the Industry Portfolio Office in July of 1998. This report presents the combined attendee evaluation results for the 1998 spring and fall events. The results of the spring exhibitor interviews are included in Appendix A.

1.2 Study Issues

This study addressed a number of issues surrounding the SME events. Issues for consideration include:

- motivations for attending and expectations of the events;
- sources of information about the events;
- overall impressions and satisfaction with the events;
- follow-up activities undertaken as a result of the events;
- recall and retention of key themes (i.e., have the events increased awareness of Government of Canada support for SMEs?);
- evaluation of usefulness of information obtained at conferences/impacts on firms' success; and
- perception of elements that were missing from the conferences/suggestions for future events.

Several broader context issues relating to the SME community were also examined, including:

- perceptions of the year 2000 computer issue;
- views on government support for SMEs; and
- information highway and innovation issues as they relate to the SME community.

1.3 Methodology

The findings presented in this report are based a number of lines of evidence, combining quantitative and qualitative methodologies:

Spring Wave

- A total of 538 on-site intercept interviews were administered at the events by Industry Portfolio officials.
- Eight post-event focus groups were conducted with attendees. Two groups were held in each of the following centres: Peterborough (March 23); Sydney (April 21); Medicine Hat (April 23); and Laval (May 27).
- A total of 605 telephone interviews were conducted with a stratified random sample of attendees following the events. Interviewing took place in two blocks (March 3 to 14 and May 14 to 25) in order to standardize the length of time following each event that participants were interviewed.
- In-depth key informant interviews with 25 exhibitors conducted May 19 to 29.

Fall Wave

- A total of 720 telephone interviews were conducted with a stratified random sample of attendees following the events. Interviewing took place in two blocks (December 3 to 16, 1998 and January 6 to 20, 1999) again to standardize the length of time between event attendance and interviewing.
- Eight focus groups were also held, two each in Hull (January 27), Timmins (January 27), Brandon (January 28) and Fredericton (January 28).

Copies of all research instruments are included in the Appendices.

a) *Note on Telephone Survey Samples*

The sample frames for the post-event survey of attendees were produced from several sources: names and telephone numbers of attendees collected via the intercept interviews at the spring events and by Portfolio staff at the fall InfoFairs, and lists of Conference and Seminar attendees provided by Portfolio officials.

Several categories of Conference attendees were removed from the lists prior to generating the sample frame as they were outside the target population (i.e., current and potential SMEs) under examination. Individuals who were in the following categories were removed from the list: federal, provincial and local government employees; members of Chambers of Commerce and local economic development agencies; bank employees (e.g., small business loans officers); and representatives of community colleges and training centres.

As there were insufficient names captured during the spring on-site interviews to generate a suitable sample frame, the overall sample relied heavily on names provided on Conference attendance lists. This tended to skew the sample towards more established businesses (as individuals with a longer connection to the local SME community were more likely to be invited to the Conference portion of the event). As a global profile of attendees is unavailable, this could not be addressed via a weighting of the data. The efforts made by Portfolio officials to gather names at the fall InfoFairs was likely helpful in this regard as there was a close to two-fold increase in the percentage of the total sample composed of those intending to start a business from the spring to fall waves.

The overall sample frame was used to generate a stratified random sample of 605 interviews for the spring wave and 720 for the fall wave. The sample was stratified to ensure an equal number of interviews with attendees at each of the events. As there were insufficient names to draw upon for certain centres (to reach the quota of completed interviews per centre), where possible those missing interviews were replaced in other centres. The two western locations for the fall events were over-sampled to bring the sampling error in line with the other regions. All data has been weighted so that each centre is equally represented in these results. Exhibit 1.1 presents the characteristics of the samples for the telephone surveys.

EXHIBIT 1.1
Attendee Telephone Survey
Sample Characteristics (n=1,325) and
Margin of Error (95 Per Cent Confidence Level)

Characteristics	Spring Wave		Fall Wave		Total	
	n	Margin of error	n	Margin of error	n	Margin of error
Region						
Atlantic	55	+/- 13.3%	178	+/- 7.4%	233	+/- 6.4%
Quebec	164	+/- 7.7%	219	+/- 6.6%	383	+/- 5%
Ontario	263	+/- 6.1	169	+/- 7.6%	432	+/- 4.7%
West	123	+/- 8.9%	154	+/- 7.9%	277	+/- 5.9%
Status						
Owner	421	+/- 4.8%	409	+/- 4.9%	830	+/- 3.4%
Employee	71	+/- 11.7%	109	+/- 9.4%	180	+/- 7.3%
Start-up	56	+/- 13.2%	138	+/- 8.4%	194	+/-7.1%
Other	57	+/- 13.1%	64	+/- 12.4%	121	+/- 8.9%
Total	605	+/- 4%	720	+/- 3.7%	1,325	+/- 2.7%

b) *Note on the Presentation of Results*

Respondents to the telephone questionnaire were asked to indicate their response using a 7-point scale (e.g., ranging from a low point of 1, "extremely dissatisfied" to a high point of 7, "extremely satisfied" with a neutral midpoint of 4). In presenting these results, the midpoint is left as its own category, with the low (1, 2 and 3) and high (5,6 and 7) scores collapsed. Mean responses are also included in the graphical presentation of results.

All variables were analyzed through cross-tabulation with demographic variables (e.g., region, business status, business tenure, firm size, Internet access, etc.). Only sub-group differences which were significant at an alpha of .05 or less (using chi-square analysis) are presented in this report with the exception of breakdowns by region on key indicators (e.g., satisfaction, recognition of federal role, etc.) which are provided for the interest of the various host agencies. These regional breakdowns should be interpreted with caution — where differences are statistically significant they are noted as being so.

In most cases the results of the spring and fall waves of telephone interviews have been presented in aggregate form due to the remarkable consistency in findings over the two waves. Where significant differences are evident in reactions to the spring and fall events these are noted. While all questions from the spring telephone instrument were maintained for the fall, several new lines of questioning were also included. These have been identified in the report as "fall only".

The results of focus group discussions are included with the related survey data in order to offer insight and explanations of specific findings.

The remainder of this report is organized around the following areas:

- Attendees' Evaluation;
- SME Priorities, Y2K, Information Highway and Innovation Issues;
- Profile of Respondents; and
- Conclusions.

In addition, the results of the spring wave on-site interviews and exhibitor interviews are included as Appendix A.

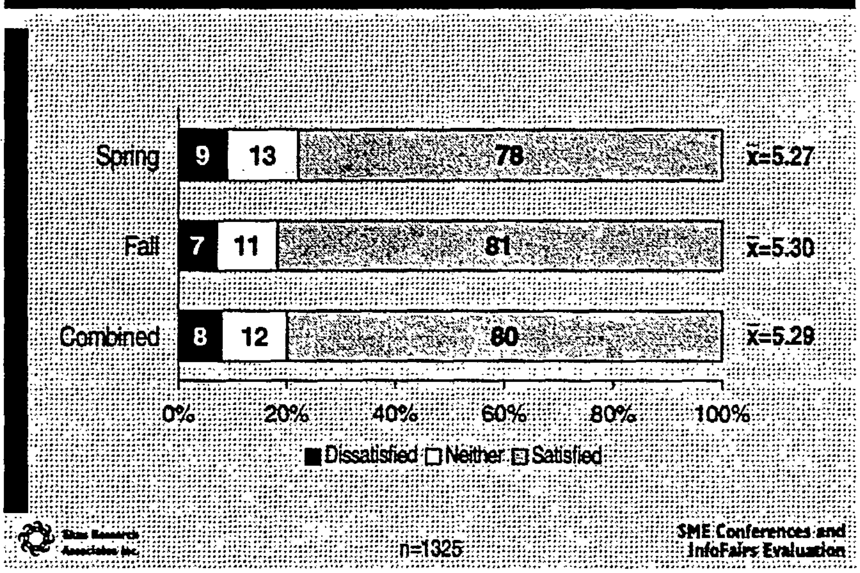
CHAPTER

2 ATTENDEES' EVALUATION

Respondents were asked to evaluate their satisfaction with the events as a whole. This post-event measure is likely more instructive than that offered by the on-site interviews as in the absence of serious difficulties with physical set-up elements, satisfaction measures conducted on-site tend to be high. The post-event measures gauge satisfaction after attendees have had the opportunity to digest the information received and have considered the overall utility of the event to their businesses.

Satisfaction with the events as a whole remained very high in the months following attendance (Exhibit 2.1a).

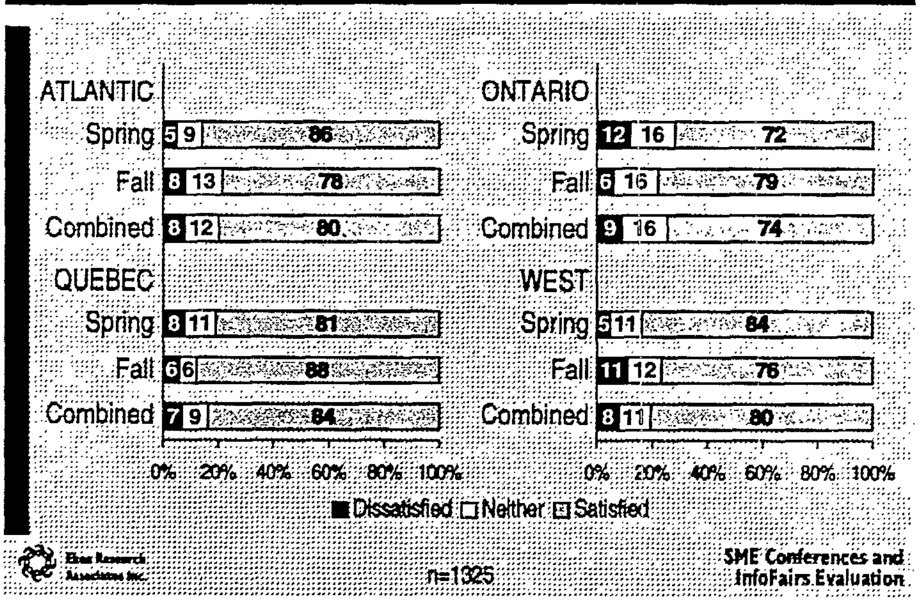
EXHIBIT 2.1
Satisfaction



Four in five attendees (80 per cent) said they were satisfied with the event, with fewer than one in ten (eight per cent) declaring themselves dissatisfied. Responses to this satisfaction measure have also remained remarkably consistent from the spring to fall waves.

While a regional breakdown is provided for interest there are no statistically significant variations in this measure by region, with the exception of the views of Quebec attendees at the fall events. When the results of the fall wave are examined in isolation, Quebec attendees expressed a significantly higher level of satisfaction with the events. While just under four in five of those in the Atlantic, Ontario and West (78 per cent , 79 per cent and 76 per cent, respectively) said they were satisfied, this rises to an impressive 88 per cent for those who attended one of the Quebec events (Exhibit 2.1b).

EXHIBIT 2.1b
Satisfaction — Regions



Focus group results offer a number of insights into the elements contributing to satisfaction with the events. Participants tended to note the wealth of material available at the events as well as the expertise of exhibitors as key factors contributing to satisfaction.

"I think it's great that they would have an event like this in Peterborough." "This shows that [the federal government] realizes how important small business is to the country...."

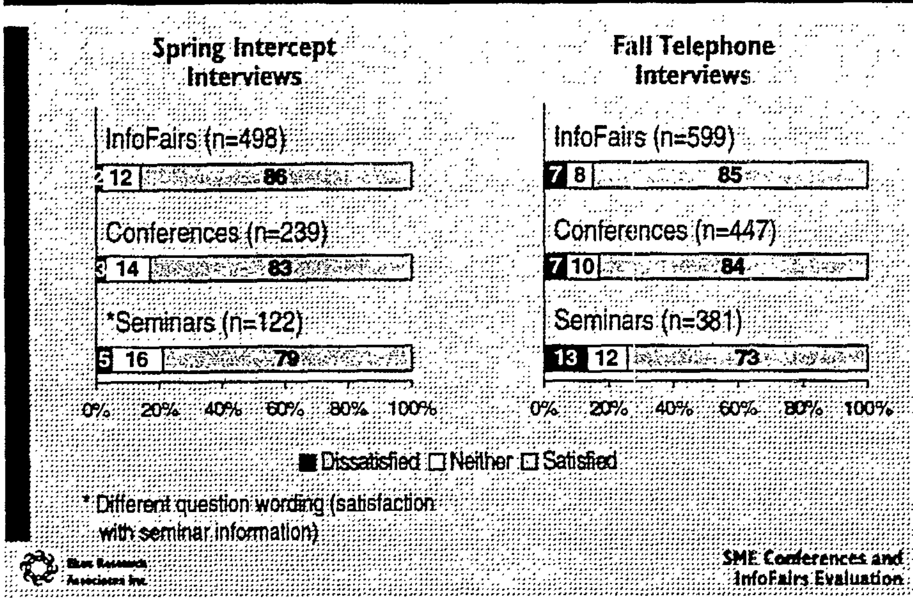
Another frequently cited strong point of the events was the notion of government outreach as a demonstration of commitment to the SME community.

The main criticism raised during the group discussion was the overall relevance of the event to attendees' businesses. This was particularly the case for individuals involved in micro-businesses who suggested that the events seemed geared towards larger, more sophisticated businesses. Attendees in larger firms were significantly more likely to say they were satisfied with the events than were those in smaller organizations. While 83 per cent of those in firms with 11 or more employees said they were satisfied with the event, this drops to 73 per cent for those in firms with three or less employees. We also find higher levels of satisfaction with SME employees (86 per cent) and those intending to start a business (87 per cent) than with small business owners themselves (76 per cent).

Despite these demographic variations, it should be noted that across all groups satisfaction remains high, with seven in ten or better declaring themselves satisfied.

Replicating questions asked on the spring intercept questionnaire, respondents to the fall wave of interviewing were also asked to rate their satisfaction with the three individual elements of each event. Again, the individual elements were very well received, with these measures in keeping with the results of the on-site evaluations at the spring events. Over four in five respondents said they were satisfied with the InfoFair (85 per cent) and Conference (84 per cent), with three in four (73 per cent) declaring themselves satisfied with the Seminars (Exhibit 2.1c).

EXHIBIT 2.1c
Satisfaction with Elements



Again, a regional breakdown is provided for satisfaction with the various elements among fall survey respondents (likely a more reliable measure than the spring on-site interviews as discussed at the beginning of this chapter).

Those saying "satisfied"	Atlantic	Quebec	Ontario	West
InfoFairs	88	86	84	78
Conferences	89	85	77	81
Seminars	70	83	64	78

It should be noted that the only statistically significant regional variation is in terms of Seminar satisfaction, with Quebec respondents registering the highest satisfaction and Ontario respondents significantly lower.

Some focus group participants indicated that they were unclear on the level of complexity and detail that the Seminars would entail and were left somewhat unfulfilled by what they perceived to be a cursory examination of the topic at hand.

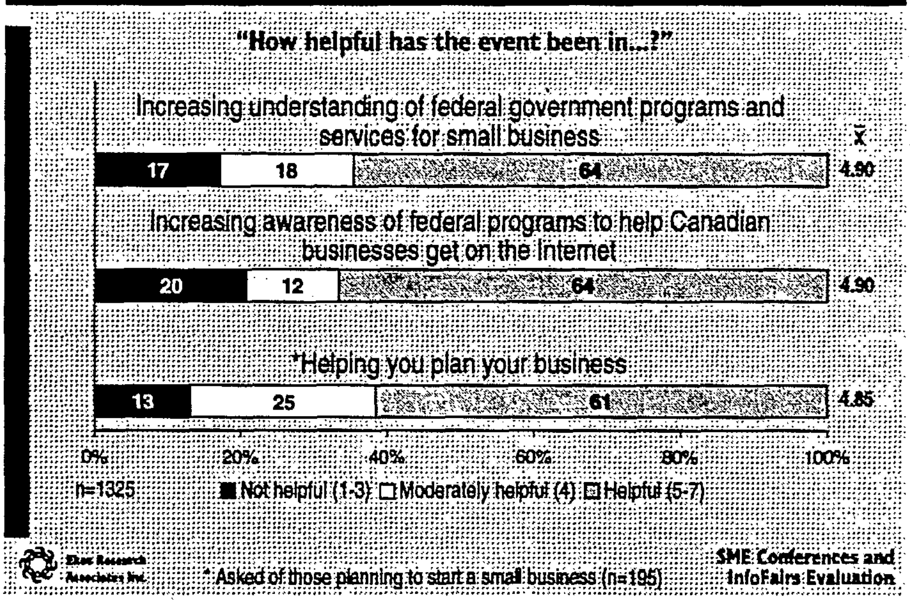
"Why don't they try to schedule a 'basic' and 'advanced' seminar at the same time? That way we'd go to the one that's really targeted to us."

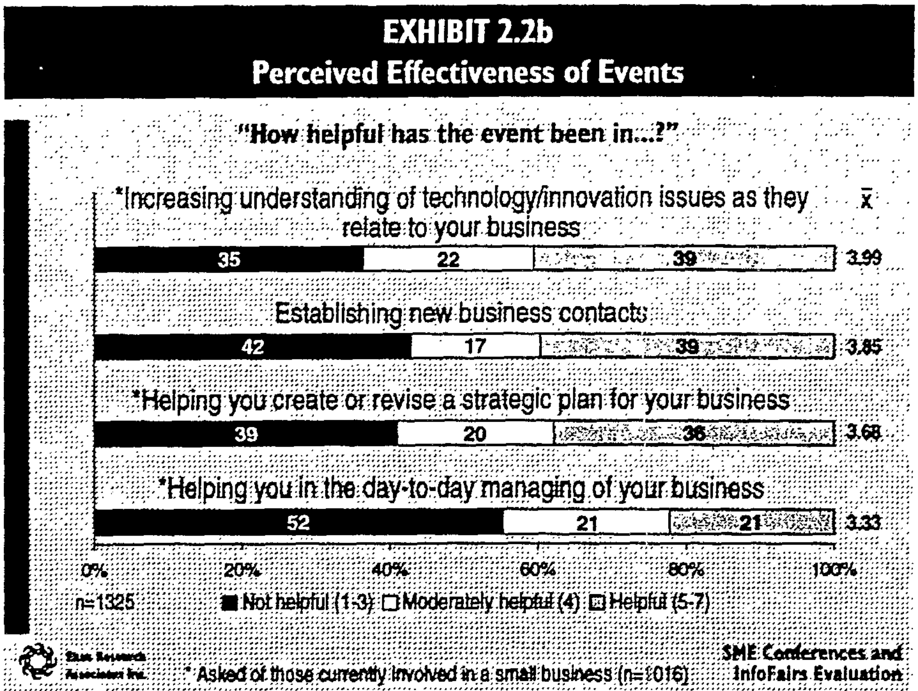
Participants held generally quite favourable views of the seminar facilitators. Several participants in fact noted that they wished they had either had more time or a more flexible seminar schedule so that they could have attended more than one seminar.

"The marketing seminar was put on by someone who had walked the path ... they weren't teaching from a text book."

Respondents were asked to rate the helpfulness of the events across a variety of measures ranging from increasing their knowledge of government programs for SMEs to helping them in the day-to-day management of their business (Exhibits 2.2a and 2.2b).

EXHIBIT 2.2a
Perceived Effectiveness of Events





The two measures most closely tied to the stated objectives of the Conferences and InfoFairs (increasing awareness of programs to assist SMEs in using the Internet and increasing understanding of federal support for SMEs) top the list with close to two in three respondents saying the events were helpful in this regard.

During the focus group discussions it was clear that most participants had learned of specific programs and services which held great appeal, either due to an intention to access them themselves or simply because they were seen as being effective government actions for the SME community. Strategis, Student Connections, the National Graduate Register and the Employment Insurance premium reduction for new hires all emerged as government activities which were highly resonant with focus group participants.

A similarly high number (62 per cent) of those intending to start a business said the events had been helpful to their planning. During the spring on-site interviews, this group had cited information of this nature as their prime motivation for attending the event.

"Governments need to create opportunities for small businesses that come in a range of possibilities. It's more valuable for me to meet the right people, make the right contacts that I can utilize in my business than getting a $1,000 grant from government."

Pluralities (39 per cent) felt the events had been helpful with respect to secondary or tertiary objectives of increasing their understanding of innovation issues as they relate to their business and in establishing new business contacts.

While the degree to which firms were engaged in hard research or technology was not captured as demographic data, the profile of focus group participants offers anecdotal evidence that many of those in attendance would perceive few if any technology and innovation issues which relate to their business.

"I went there to find out what the government is doing for us ... I wasn't looking for advice on how to run my business."

Close to one in two (46 and 52 per cent respectively) felt the events had *not* been helpful with respect to more operational elements of their businesses: creating or revising strategic plans and assisting in the day-to-day managing of their businesses. These were not included as objectives of the events and many focus group participants suggested that they would not attend events such as these to acquire that type of information.

Respondents were asked if they had followed up with any exhibitors since attending the events. Just under four in ten (38 per cent) indicated that they had initiated a follow up contact. A plurality of follow-ups were with non-Portfolio federal departments (particularly HRDC and Revenue Canada). Just over one in four (27 per cent) of those who have followed up with an exhibitor did so with one of the Portfolio partners (Exhibit 2.3).

Close to one in two (48 per cent) of those who had followed up with an exhibitor did so for the purpose of acquiring additional information about a specific program or service they had learned of at the event. An additional 42 per cent followed up for the purpose of acquiring additional general information, with nine per cent intending to conduct a specific transaction with an official (Exhibit 2.4).

EXHIBIT 2.3
Post-Event Follow-Up (a)

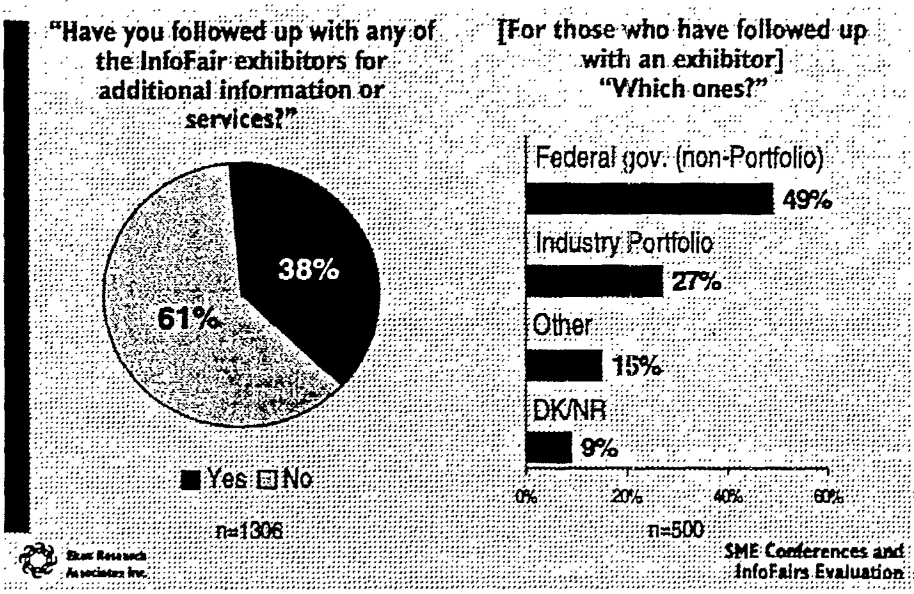
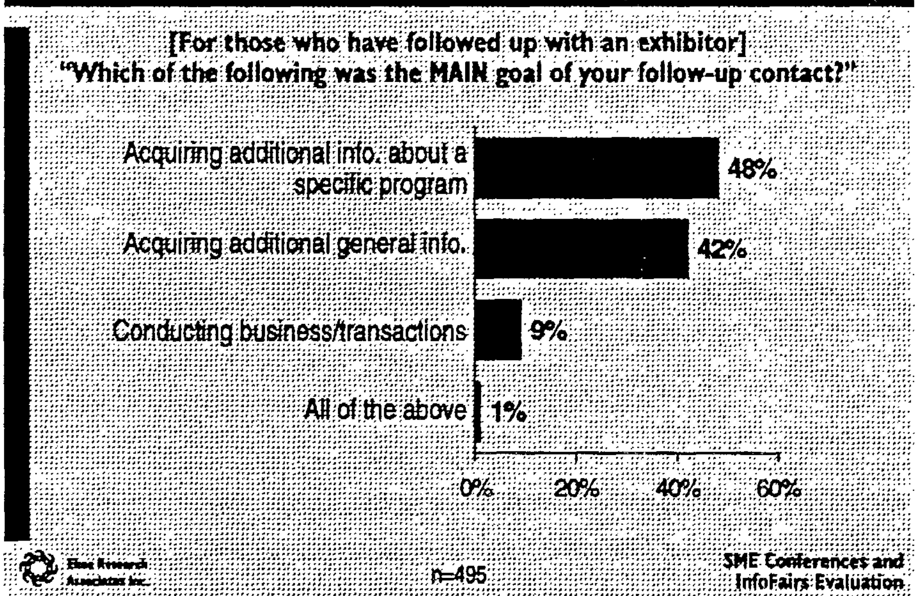


EXHIBIT 2.4
Post-Event Follow-Up (b)

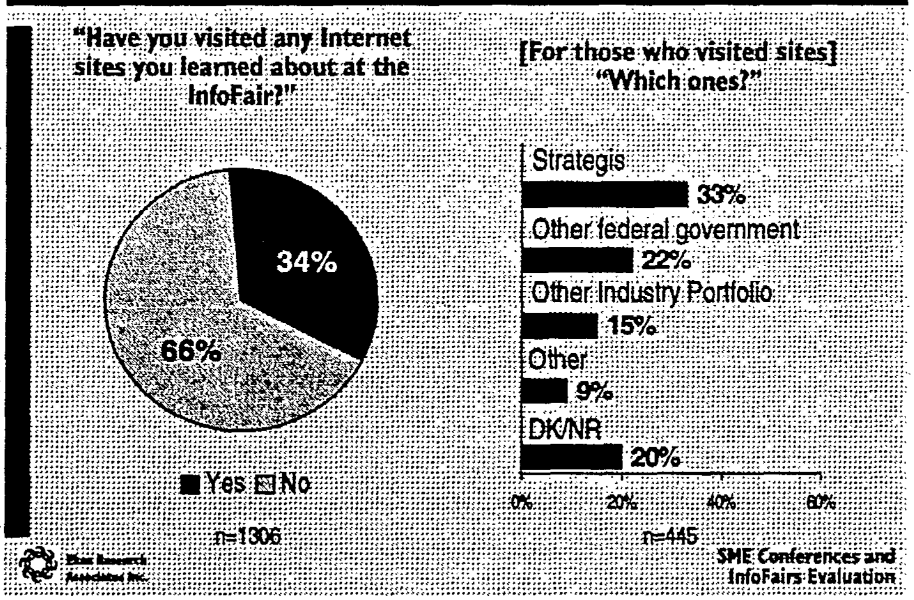


"I have her card now...at least I can call and talk to a live person now."

Several focus group participants did make the point that there was a comfort level in having spoken directly to a government representative at the events.

One in three (34 per cent) respondents also said they had visited one of the Internet sites they learned about at the events. The most frequently cited web site was Strategis, visited by 33 per cent of those who had conducted an Internet follow-up. One in five (22 per cent) visited a non-Portfolio federal site and 15 per cent visited a Portfolio site other than Strategis. Some 29 per cent of those indicating they had visited one of the sites they learned about said it was a non-governmental site (nine per cent) or that they could not recall which site they had visited (21 per cent) (Exhibit 2.5).

EXHIBIT 2.5
Post-Event Follow-Up (c)



Strategis was a frequent topic of spontaneous discussion during the focus groups. Many participants spoke glowingly of the service as it offered "anything you're looking for". Most participants could not name specific types of information they would be seeking or would anticipate finding via Strategis, but, at the conceptual level it clearly struck a resonant chord with those who learned of it at the events. For others, they had clear plans of what Strategis would do for them ("I'll be able to see who else my exporting agent is dealing with"), but had yet to put the service to use for their business.

This notion of time pressures was a frequently raised point during the group discussions. Many noted that extreme time constraints were a fact of life for them, particularly in the early stages of their businesses. Information contained in the Guide to Government Services for SMEs, Strategis and other general program information were set aside until they "make time to look into them". Many participants suggested that they did hope to either follow up with an exhibitor or undertake additional research but these activities fell into a lower priority category than the running of their businesses.

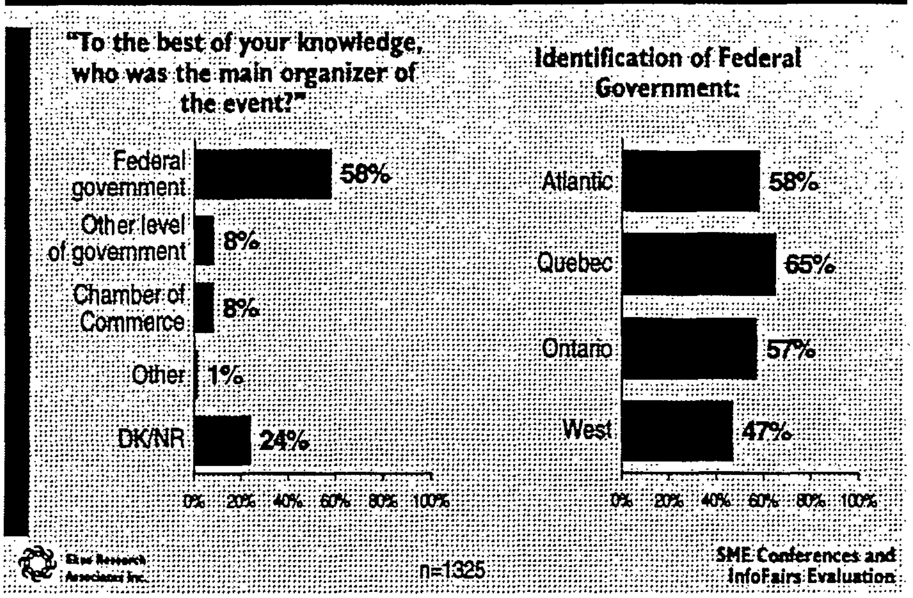
"We're only four people in the office ... it's hard to make time for things like [additional research]."

While the fall focus groups include a series of questions dealing specifically with the SME guide, none of the participants had done more than quickly scan it. It is worth noting, however, that essentially all participants recognized the guide and were keeping it for future reference. The general consensus was that such a guide was a positive initiative on the government part.

Some participants, particularly those who were planning to start a business, described the amount of information in the guide as somewhat overwhelming. A number of those with Internet access noted that they tend to search for government material on-line first and consider such information far more up-to-date than printed material.

Respondents were asked to name the "main organizer" of the event they attended. While a majority (58 per cent) correctly identified the federal government as the main organizer, fully one in four (24 per cent) said they did not know who had organized the event. Eight per cent of respondents identified either the Chamber of Commerce or other level of government as the organizer (Exhibit 2.6).

EXHIBIT 2.6
Recall of Federal Involvement



There are significant variations by region with respect to identification of a main organizer of the event. Recognition of the federal role in organizing the events was strongest in Quebec (65 per cent). Fifty-eight per cent of Atlantic respondents, 57 per cent of those in Ontario and 47 per cent of those in Western Canada identified the federal government as the main organizer.

While these findings are somewhat puzzling upon a cursory examination, the focus group discussions shed some light on the question of identification of the event "organizer". Participants seemed to form a linear relationship between who informed them of the event (e.g., in many cases a letter from the local Chamber of Commerce) and the "main organizer of the event". Regardless of who was seen as being primarily responsible for organizing the events, participants had a clear understanding that they were designed to showcase federal programs and services.

Given the ease with which focus group participants discussed the range of federal SME services, the actual impact of the events in terms of awareness of federal presence is clearly far greater than a literal interpretation of this single survey indicator would suggest.

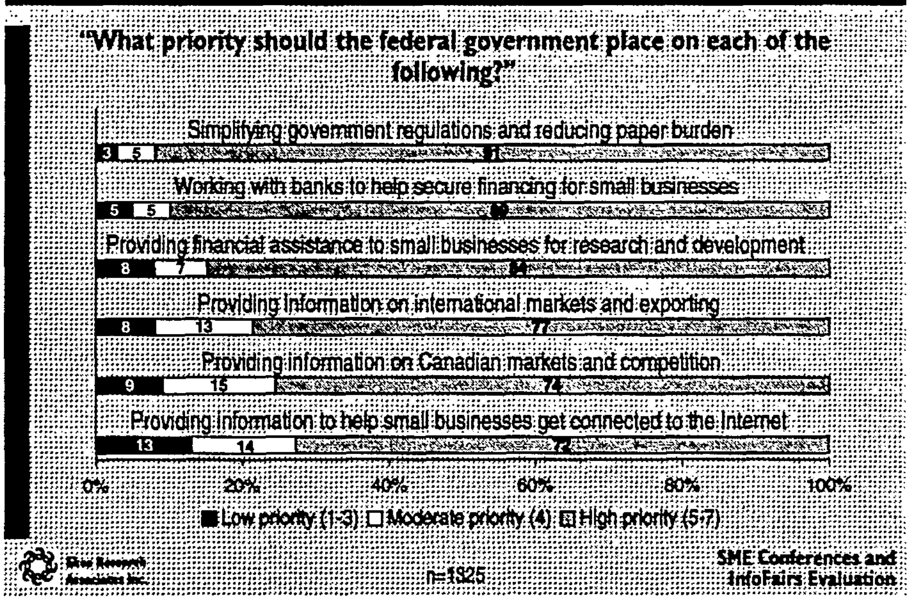
CHAPTER

3 SME PRIORITIES, Y2K, INFORMATION HIGHWAY AND INNOVATION ISSUES

3.1 SME Priorities

Survey respondents were asked to evaluate the priority the federal government should place on a number of initiatives aimed at the SME community over the coming five years. All of the actions tested were deemed a high priority by at least two in three respondents, albeit with a clear hierarchy emerging (Exhibit 3.1).

EXHIBIT 3.1
Federal Priorities for SMEs



The three top priorities tested were simplifying government regulations/ paper burden reduction, working with banks to help secure financing for small business, and providing financial assistance for research and development, deemed a high priority by over four in five respondents (91, 89 and 84 per cent respectively).

Regulations and paper burden were frequently mentioned irritants during the focus group discussions. Most participants particularly perceived the compliance burden with the GST as onerous.

Access to financial capital was also key for most participants. While some were critical of a lack of *government* sources they could access, the dominant view was that the government ought to be doing more to ensure banks make capital available to small businesses.

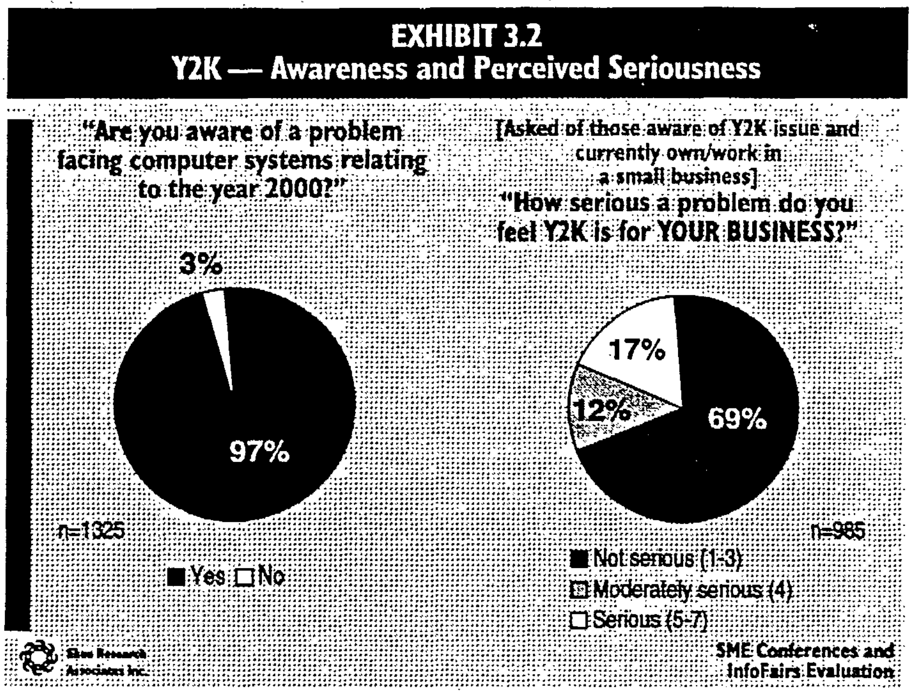
"You get all excited because this program looks great then you find out its not for you because you're too old or a man or whatever...it's frustrating."

Three in four respondents felt a high priority should be placed on providing information on international opportunities as well as on domestic markets and seven in ten said information aimed at helping SMEs connect to the Internet ought to be a priority. These priorities remain consistent with no significant differences by region, business size or status.

3.2 Year 2000

As the events featured exhibitors from the Year 2000 Task Force and some seminars dealing with the Y2K issue, a number of questions were asked to gauge awareness and perceptions of this issue.

Stated familiarity with the Y2K issue is nearly universal, with 97 per cent of respondents saying they are aware of the "problem facing computer systems relating to the year 2000". For those involved in a small business, however, seven in ten believe that the Y2K issue does not present a serious problem to their businesses. While, fewer than one in five in fact believe that the Y2K is a serious problem to their businesses, this is not based on a dismissal of the situation as exagerrated (Exhibit 3.2).

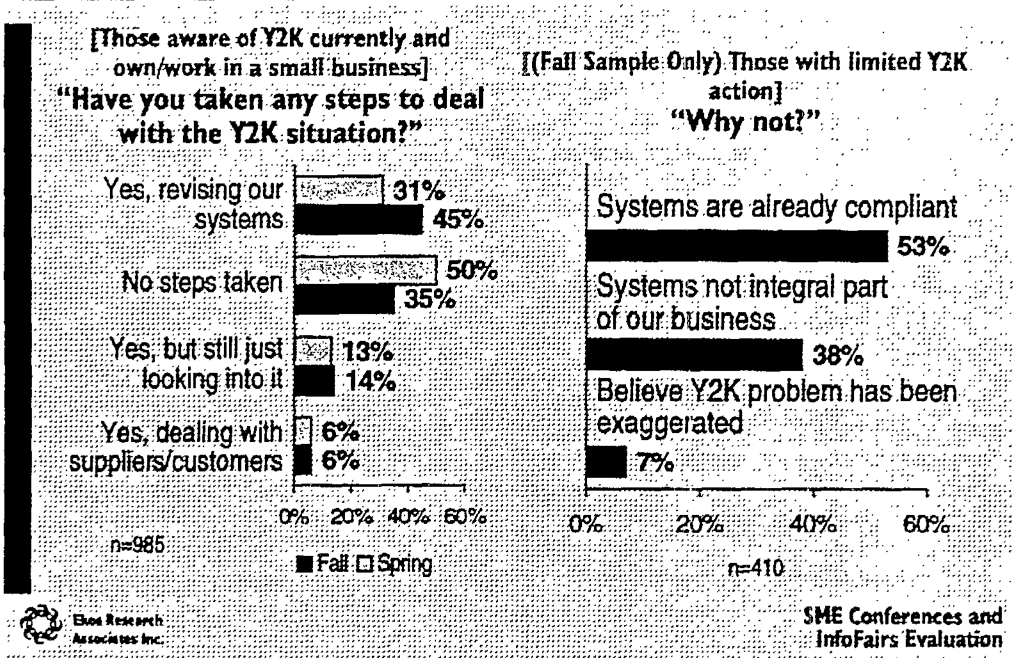


Employees of small businesses are more likely to see the Y2K issue as a problem for their enterprises than are small business owners themselves. While just 15 per cent of business owners feel they are facing a problem, this rises to 28 per cent among employees of a SME.

The perceived seriousness of the issue has increased from the spring to the fall. Whereas 73 per cent of those interviewed in the spring said the Y2K did not represent a serious problem to their business, this fell to 66 per cent in the fall sounding.

Respondents were also asked what actions, if any, their firms had taken to deal with the Y2K issue. In line with the increased perception of the seriousness of the problem, we see far fewer respondents who have taken no action to deal with the issue. While fully one in two of those interviewed in the spring had taken no action, this fell to 35 per cent in the fall (Exhibit 3.3).

EXHIBIT 3.3
Y2K — Actions Taken



While there is little difference in terms of firm size with respect to perception of the seriousness of the Y2K issue, larger firms are significantly more likely to have taken some action on the issue. Whereas 57 per cent of firms with three or fewer employees have taken no action on the Y2K front, this drops to 21 per cent of firms with 11 or more employees.

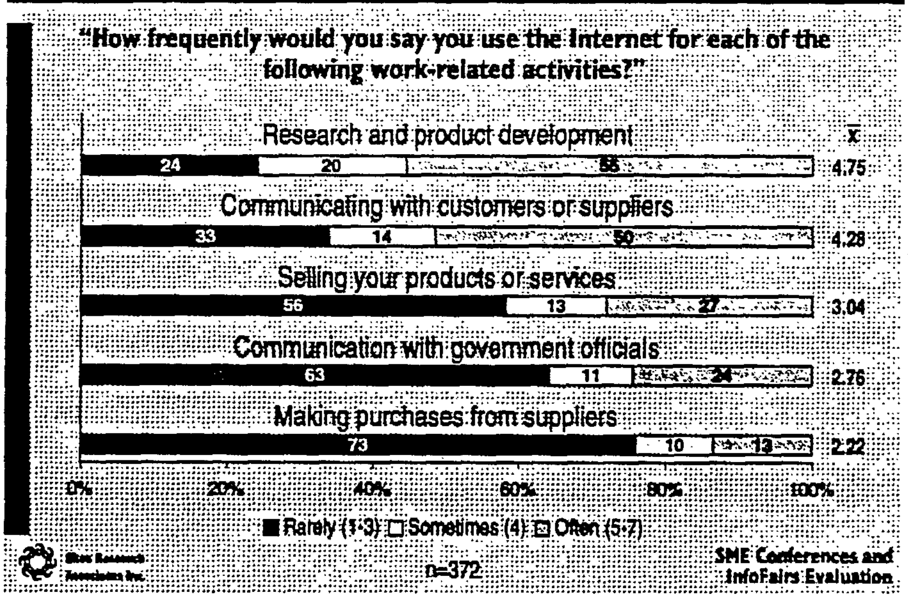
An additional question was added to the fall survey to probe why those firms who were inactive on the Y2K front were not taking any steps. Less than one in ten say their inaction is due to belief that the issue has been exaggerated. Over half in fact say that their systems are already fully compliant, with an additional four in ten saying that systems are simply not an integral part of their business (see Exhibit 3.3).

3.3 Information Highway and Innovation

A series of questions was added to the fall survey exploring the issues of business-related Internet usage and innovation issues as they pertain to the small business community.

Just over seven in ten respondents reported having access to the Internet, with three-quarters of those who are both on-line and currently involved in a SME using the Internet for business purposes. This sub-sample was then asked about the frequency with which they engaged in a number of business-related Internet activities (Exhibit 3.4).

EXHIBIT 3.4
Internet Usage (a)



The most frequently engaged in activities were using the Internet for research and development and to communicate with customers and suppliers, with majorities of those on-line saying they often put the Internet to use for these purposes. Just over one in four (27 per cent) say they often use the Internet to sell their products or services, rising to four in ten if those who "sometimes" engage in electronic commerce are included.

The focus group findings shed some additional light on this finding. It became apparent that many participants who have web sites would likely respond that they "sell" their products via the Internet, even though they are actually advertising or promoting their products on-line. A small number of participants said that they were either currently selling on-line (or taking steps to do so in the near future), suggesting that the four in ten survey respondents likely form a combination of on-line "sellers" and "promoters".

One in four respondents said they often use the Internet to communicate with government officials, and just over one in ten said they often make on-line purchases from their suppliers. Again, the focus groups suggest that in fact many are researching product purchases on-line, either comparison shopping or verifying prices. Many participants cited this aspect of the Internet as a powerful new force in marketing and commerce.

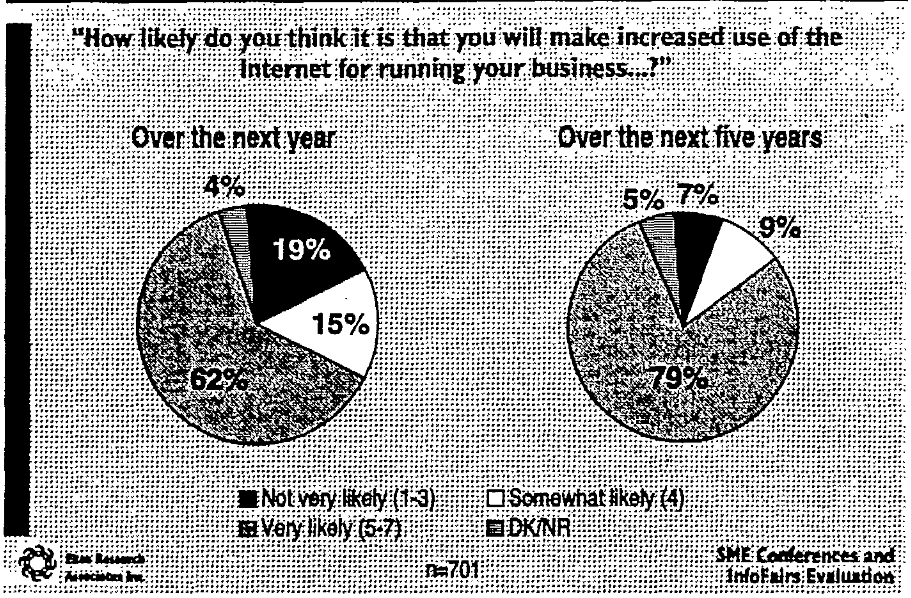
"It's great... anyone can go to our site and find out all about us... I've had clients from Germany, all because of my Web page."

Views among focus group participants on federal government use of the Internet were mixed but with a decisive lean towards positive. There was a sense among some that the government was "pushing the net pretty hard ... they don't answer questions, just direct you to a web site". More often that not, however, participants reported positive experiences in accessing services or information on-line: "I want to start another company and I can find out if anyone else has the name copyrighted by going on the net".

"I can download Revenue Canada forms on-line ... it used to take weeks to get them sent to me."

A majority of those who are not currently making frequent business use of the Internet expect to be doing so within the near future. Fully six in ten say it is very likely they will be making more use of the Internet over the next year, rising to eight in ten when considering a five year window (Exhibit 3.5).

EXHIBIT 3.5
Internet Usage (b)



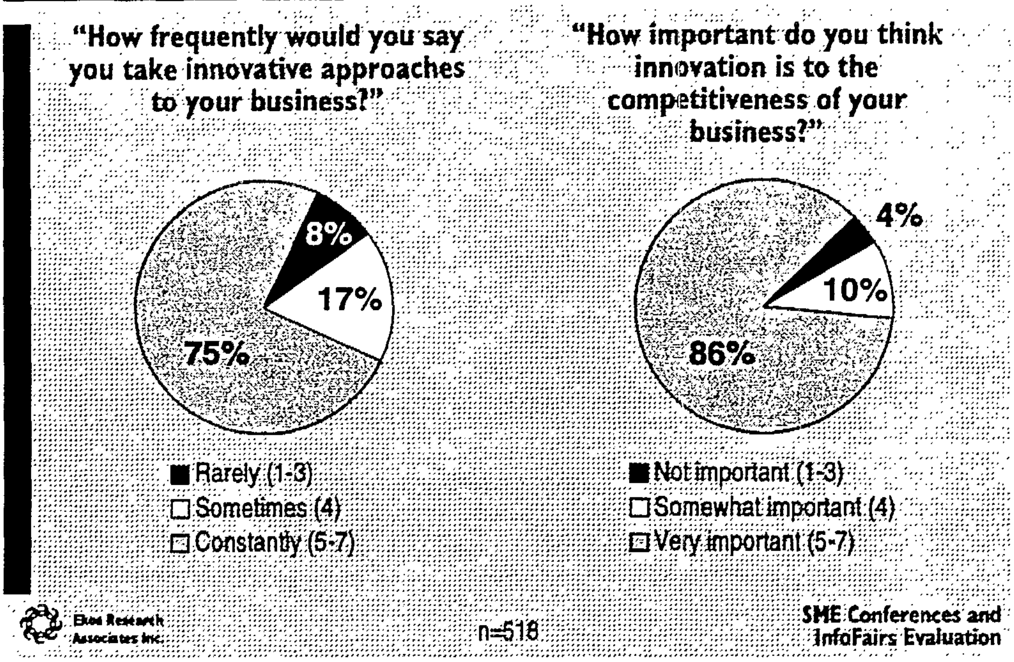
Turning to the issue of "innovation", survey respondents and focus group participants were asked about what the term meant to them and their businesses. Large majorities of survey respondents said they frequently took innovative approaches[1] in their businesses and that in fact innovation is a very important element of the competitiveness of their businesses (Exhibit 3.6).

The focus group discussions on innovation revealed that while some participants could not always easily identify concretely what "innovation" means, they could point to examples of it in action.

"Our clients are innovating. If you're not innovative, you're not in business."

1 Defined in the survey instrument as "Significantly improving your products or services or improving production, marketing, inventory or delivery processes".

EXHIBIT 3.6
Innovation (a)

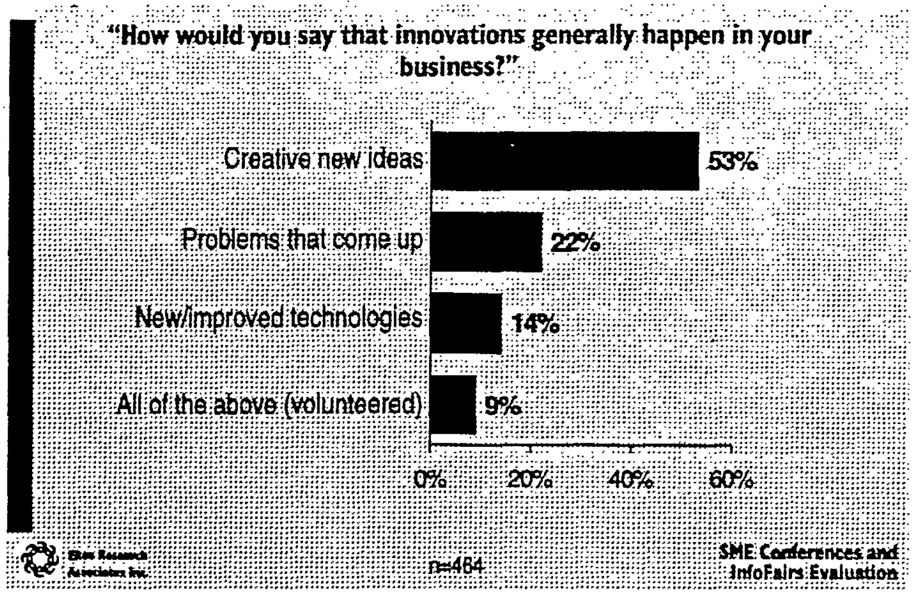


Just over half (53 per cent) of those survey respondents who did report frequently taking innovative approaches, say this is due primarily to creative new ideas for their businesses. The remainder say their innovations are either as a result of problems that arise (22 per cent), new technologies becoming available (14 per cent) or some combination of the three factors (Exhibit 3.7).

Focus group participants who were involved in technology intensive businesses tended to see innovation in terms of improvements and advances to their core technologies. For others, networking and mentoring were cited as important to innovation as they saw small business as somewhat insular.

"Because you're one or two people trying to run a business you have to make time to get out there and get new ideas."

EXHIBIT 3.7
Innovation (b)

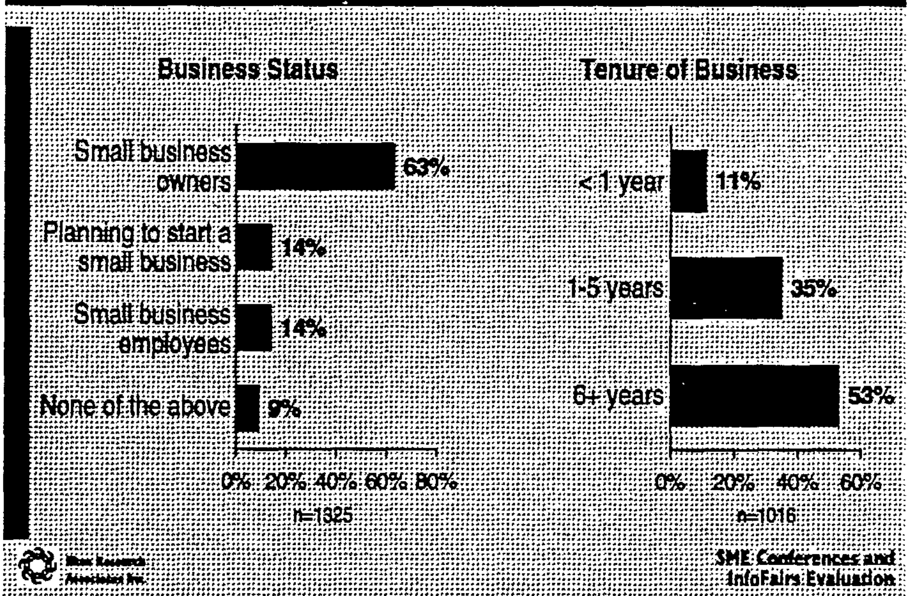


CHAPTER

4 RESPONDENT PROFILE

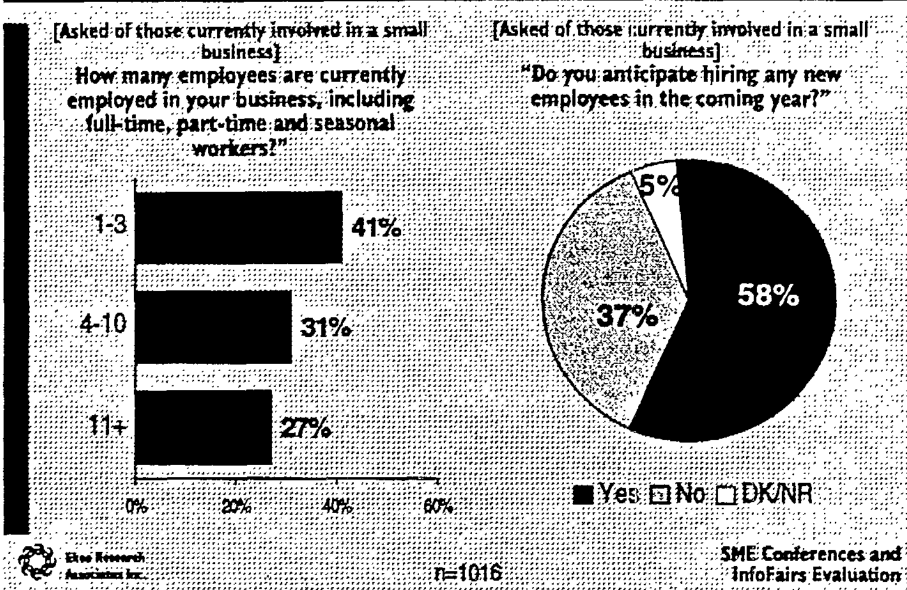
Six in ten of those interviewed were small business owners with an additional 14 per cent being SME employees. Fourteen per cent of those interviewed were planning to start a small business. Among those involved in a SME, a majority (53 per cent) has been in operation for over five years. One in three (35 per cent) have been in operation for between one and five years, with 11 per cent involved in an enterprise that is less than one year old (Exhibit 4.1).

EXHIBIT 4.1
Profile of Respondents



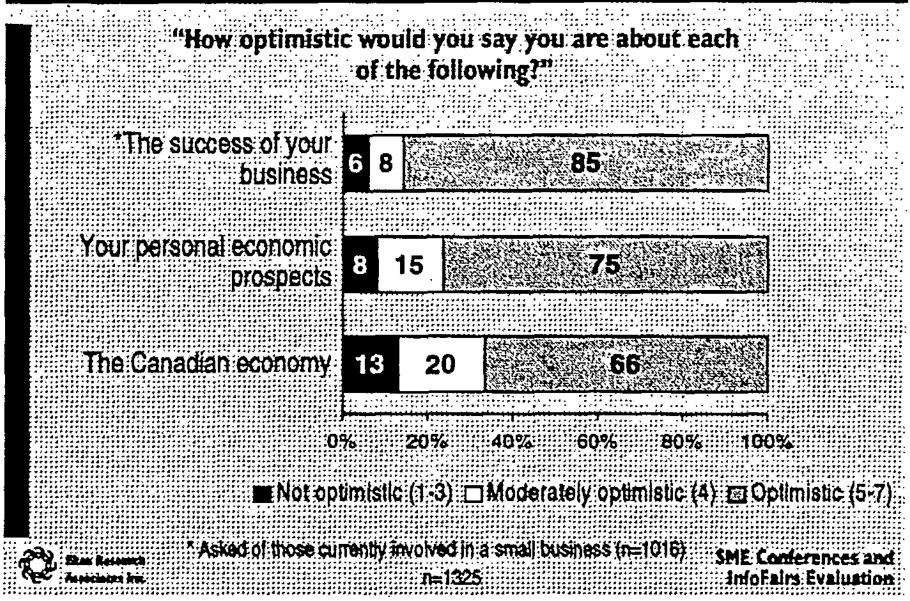
The sample featured a good mix of business sizes with a plurality (41 per cent) of respondents involved in businesses with three or fewer employees, three in (31 per cent) in businesses with between four and ten employees and one in four (27 per cent) in enterprises with 11 or more employees. Close to six in ten (58 per cent) of those interviewed anticipate hiring additional employees over the coming year (Exhibit 4.2).

EXHIBIT 4.2
Size of Business and Expansion Plans



These plans for hiring are supplemented by the overall sense of optimism respondents had across a variety of measures. Over four in five of those interviewed were optimistic about the success of their business, with three-quarters declaring themselves optimistic about their personal economic prospects. Optimism towards the Canadian economy is somewhat more muted and declined significantly over the two waves of the research, falling from 71 per cent in the spring to 61 per cent in the fall (Exhibit 4.3).

EXHIBIT 4.3
Optimism



During the focus group discussions, many factors were seen as contributing to optimism, even though most participants acknowledged the serious challenges involved in running a business. The autonomy involved in running your own business, greater flexibility and the ability to see clear value from their labours were among the most frequently cited positive aspects of being involved in a SME.

This personal and professional optimism is noteworthy for several reasons. As an overall observation, it is higher among the SME population under examination here than we would find in general public surveys conducted over a similar time frame.

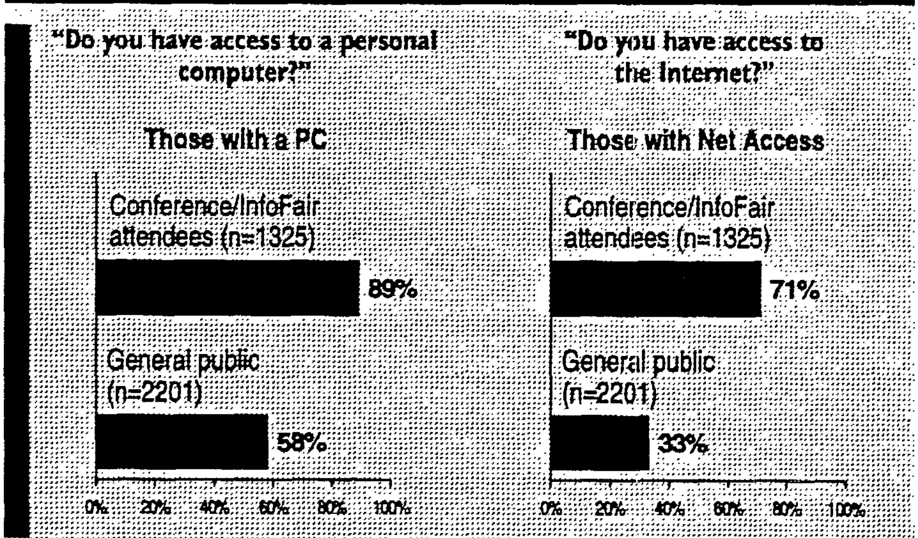
This optimism was apparent during many of the focus group discussions as well. Even those participants who cited being "unwilling entrepreneurs" (having started a small business following a job loss) had a sense of pride and invigoration that many felt was qualitatively different than that found among the general working population.

A second point of note is the relative stability of personal and professional optimism existing in concert with a sizeable drop in optimism towards the Canadian economy. Other research we have conducted suggests that this apparently paradoxical combination is not uncommon. We have seen a resurgence of optimism among Canadians at the same time as concerns with the Canadian dollar and the economic woes of Asia and Latin America are on the rise.

The respondent profile reveals a high level of computer and Internet access. Nine in ten (89 per cent) of those interviewed have access to a personal computer with seven in ten (71 per cent) having Internet access. Both of these indicators are far higher that we find in our soundings of the general Canadian public's access to PCs and the Internet (Exhibit 4.4).

In a question added to the fall wave of telephone interviewing, three in ten respondents stated that their firms had web sites. The incidence of web sites is higher among larger firms, rising from 20 per cent of those with three or fewer employees to half of those with 11 or more employees.

EXHIBIT 4.4
PC and Internet Access



SME Conferences and InfoFairs Evaluation and Information Highway, June 1998

CHAPTER

5 CONCLUSIONS

- Both the spring and fall waves of events have been successful in achieving their main objectives — increasing attendee awareness of federal services available to SMEs.

- Participant satisfaction with the events is high and seems durable (in some cases interviewing was conducted two months following the events).

- This satisfaction is fairly consistent across regions as well as business profile (although somewhat higher among those involved with larger firms and among SME employees and intended startups than for owners themselves).

- The highest evaluation results are seen for the main goals laid out during the planning phase of the events: a majority of those in attendance felt the events had been helpful in increasing their awareness of federal programs and services aimed at the SME community.

- A secondary, intangible benefit of the events also emerged from discussions with participants and exhibitors. Attendees frequently cited that the very fact the events were being held was evidence of the government's commitment to the SME community. This was noted by many as a welcome development and assisted in changing perceptions that the government was more focused on large businesses.

- This outreach was also portrayed as demonstrating government recognition of the role SMEs play in terms of job creation in Canada. This sentiment was echoed by many exhibitors; based on their contacts with attendees they had a strong appreciation for this outreach facet of the events.

- Some criticisms of the events also emerge: most notably the perceived relevance to participants' businesses. This criticism seemed largely focused on the fact that many participants saw themselves as either micro businesses or involved in enterprises they felt were unlikely to benefit from government programs oriented towards innovation or technology themes. There was a pervasive sense for many of those in attendance that there was "little there for them".

- Regardless of any criticisms offered during follow-up discussions with participants, the near unanimous consensus was that these events are worthwhile and ought to continue. Participants had a great deal of appreciation for the fact that events such as these could not be "all things to all people" and were likely an iterative, improving process.

- Offering a clearer indication of what exhibitors would be of interest to attendees in various SME "lifecycles" (e.g., start-ups, established, expanding) would likely serve to increase satisfaction with the relevance of the events while maintaining the strong intangible benefit of government outreach.

- This sentiment is mirrored by many exhibitor comments which suggest such a segmentation would afford them with a greater opportunity to target their time to their most likely client groups.

- A suggestion arising from the focus group discussions was to have officials at the entrance of the events directing those unsure of where to go. While this concept was implemented with the new information booth for the fall events, it was clear that many focus participants wanted to have an official be willing to spend "as long as it takes" to direct their visit to the InfoFair.

- A frequent comment made by attendees during the post-event discussions was that their input should have been sought prior to the planning of the events. Including messaging of this type into communications of future events offers the opportunity to demonstrate that the events are, in fact, being responsive to feedback received from the SME community.

- There also appeared to be some discrepancies with respect to the primary goals of the event (i.e., federal visibility and increasing awareness of supports for SMEs) and exhibitor views on why they were there. Exhibitors tended to see their attendance as being primarily focused on new "hard" client contacts and conducting transactions. Reiterating and clarifying the goals of the events would be helpful in increasing exhibitor comfort level with their roles.

APPENDIX A
On-Site Interviews and Exhibitor Evaluations
(Spring Wave)

Ekos Research Associates Inc., 1999

ATTENDEES' EVALUATION

On-Site Evaluation

The on-site questionnaires gauged reaction to the three separate elements of the events: the Conference; InfoFair; and Seminars. Across most measures tested, a majority of respondents declared themselves satisfied with the events.

(a) Conference

Over four in five (83 per cent) respondents who attended the Conferences said they were satisfied with that portion of the event, with similar numbers saying they were satisfied with the physical set-up of the halls, the presentations by local entrepreneurs and the keynote ministerial speech. There were no significant differences in satisfaction levels amongst the various Conferences (Exhibit 2.1).

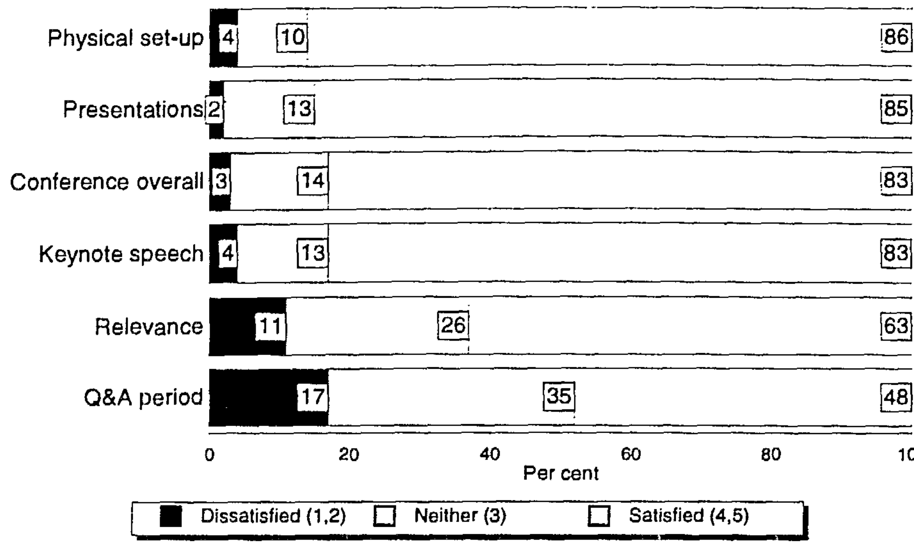
- Focus group participants generally felt the local entrepreneurs were an inspiring element of the event. While some felt disconnected from the presentations — "I'm not in their league ... I'm not trying to be a big player ..." — the consensus was that demonstrating local successes was uplifting.

- The reaction to the keynote speech was also generally positive among those focus group participants who had attended the Conferences. While most said they were impressed with the information contained in the speech and the Ministerial presence, some suggested they felt the speech did not reflect the realities of the local business environment — "... the speech was more about Toronto and Montreal than what we're up against in Cape Breton".

In a theme that recurs in the reaction to the InfoFairs and Seminars, satisfaction drops somewhat — albeit with a majority (63 per cent) of respondents still satisfied — with respect to the overall relevance of the Conference to their businesses. A plurality (48 per cent) of respondents said they were satisfied with the question and answer session of the event (see Exhibit 2.1).

EXHIBIT 2.1
Conference Satisfaction

"How satisfied were you with the following elements of the conference?"



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n=239

SME Conferences and InfoFairs Evaluation

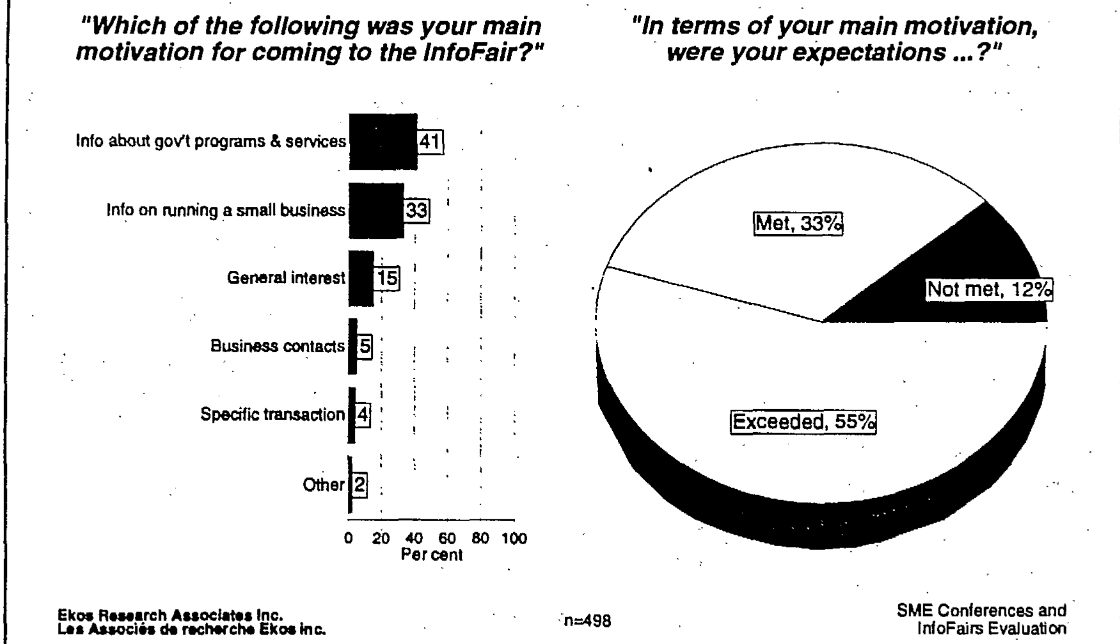
- The question of the overall relevance to specific SMEs was the dominant criticism of the event as a whole. Focus group participants frequently mentioned the fact that the events were impressive but of minimal relevance (for many) to their own businesses. This criticism was tempered by an acknowledgement by many that it was impossible for an event of this scale to be all things to all people.

- The question and answer sessions were mentioned in many open-ended comments on the survey as well as in the focus groups. The principal criticisms were that the session was either too short or did not fully address "the tough questions" on concerns such as taxation, specifically the GST.

(b) InfoFairs

The main motivations cited for attending the InfoFair were obtaining information on running or setting up a small business (41 per cent) and learning about government programs and services for SMEs (33 per cent). Smaller numbers cited general interest (15 per cent), making new business contacts (five per cent) or conducting a specific transaction with a government official (four per cent). Close to nine in ten attendees interviewed felt their expectations with respect to their main motivation for coming to the InfoFair had been either met (33 per cent) or exceeded (55 per cent), with just 12 per cent saying their expectations had not been met (Exhibit 2.2).

EXHIBIT 2.2
Motivations for Attending InfoFair



The only profile difference of note with respect to motivations is the higher proportion of those intending to start a business (*versus* established businesses) who were looking for information to assist them in launching their enterprise — 62 per cent of those planning a business cited this as their main motivation.

There are some differences of note regarding perceptions of whether or not expectations had been met by the InfoFair. Attendees in Sydney and Yorkton were more favourable in this measure (84 per cent and 78 per cent respectively saying their expectations had been *exceeded*), with those in Laval less so (40 per cent saying expectations were exceeded, 36 per cent saying they were met and 24 per cent saying they had not been met).

The print and electronic media were the dominant sources of news about the InfoFair. Informal news of the event was the next highest mention followed by an invitation from a professional association. Pamphlets, invitations from government officials, posters and the Internet were also mentioned by smaller numbers (Exhibit 2.3).

Participants at the Yorkton and Medicine Hat events were somewhat more likely than those in other parts of the country to cite having heard about the event through the media.

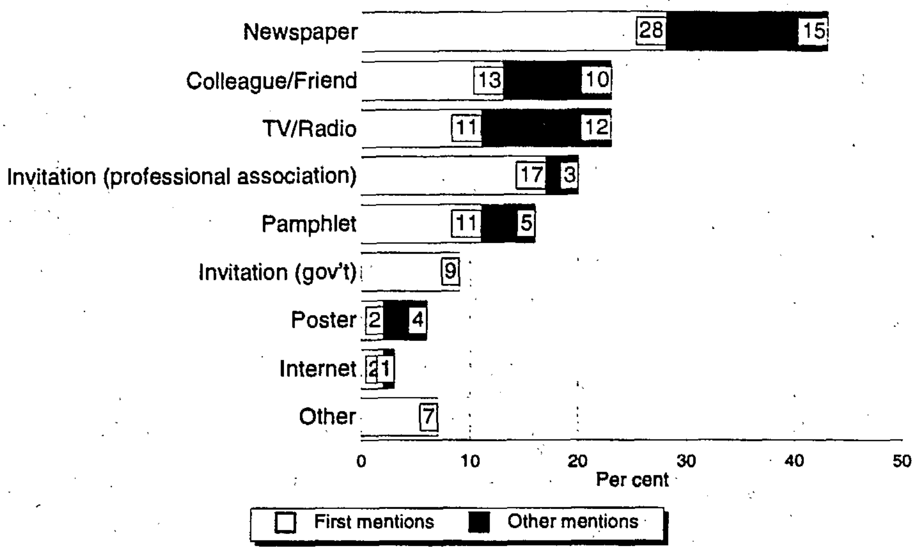
The stated intention to follow up with an exhibitor following the event was quite high, with more than four in five of those interviewed saying they planned to do so although post-event measures reveal a lower take-up, as discussed later in the chapter (Exhibit 2.4). A similar number (79 per cent) said they intended to visit Internet sites they had learned about at the event.

The most frequent individual departments and agencies mentioned were Industry Canada[1] (39 per cent) and the Business Development Bank of Canada (26 per cent). All other Portfolio members were mentioned by 44 per cent of respondents with

1. The figure for Industry Canada includes both references to IC specifically as well as individual programs and branches including CIPO, FedNor, SchoolNet, Student Connections, TPC and the Y2K Task Force.

EXHIBIT 2.3
Sources of InfoFair Information

"How did you hear of the InfoFair?"



(Multiple responses accepted)

n=498

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SME Conferences and InfoFairs Evaluation

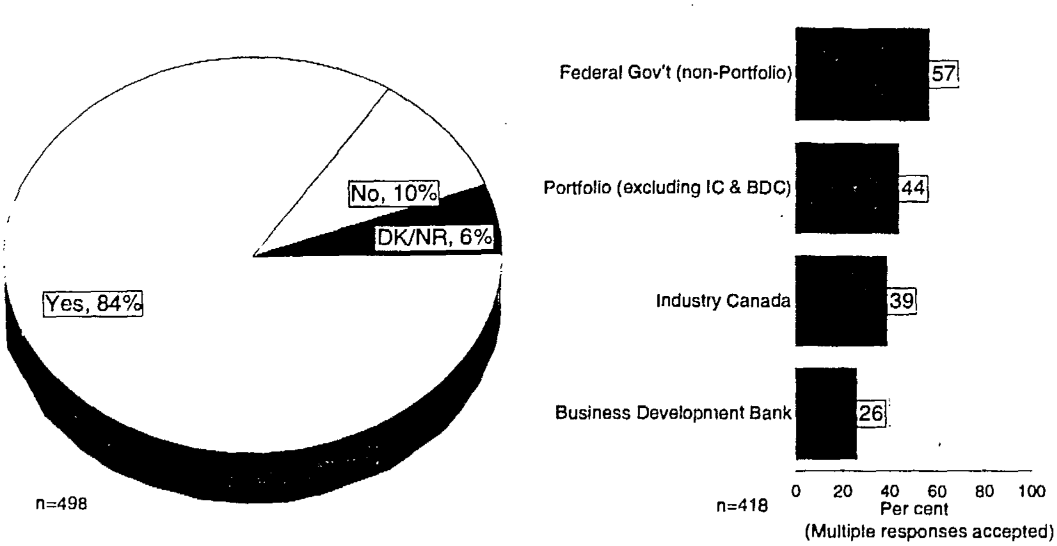
other non-Portfolio federal organizations cited by 57 per cent of respondents (see Exhibit 2.4).

Mentions of exhibitors were fairly constant across all sites with the exception of the regional development agencies — e.g., mentions of WED isolated to the western events.

Close to nine in ten respondents said they were satisfied with the knowledge of exhibitors and quality of information available, the physical set-up as well the InfoFair as a whole. The scheduling of the event garnered a marginally lower satisfaction rating, with the lowest score (although still two in three respondents satisfied) being for the relevance of the InfoFair (Exhibit 2.5).

EXHIBIT 2.4
Intentions to Follow-Up with Exhibitors

"Do you plan to follow-up with any exhibitors?" *"Which ones?"*



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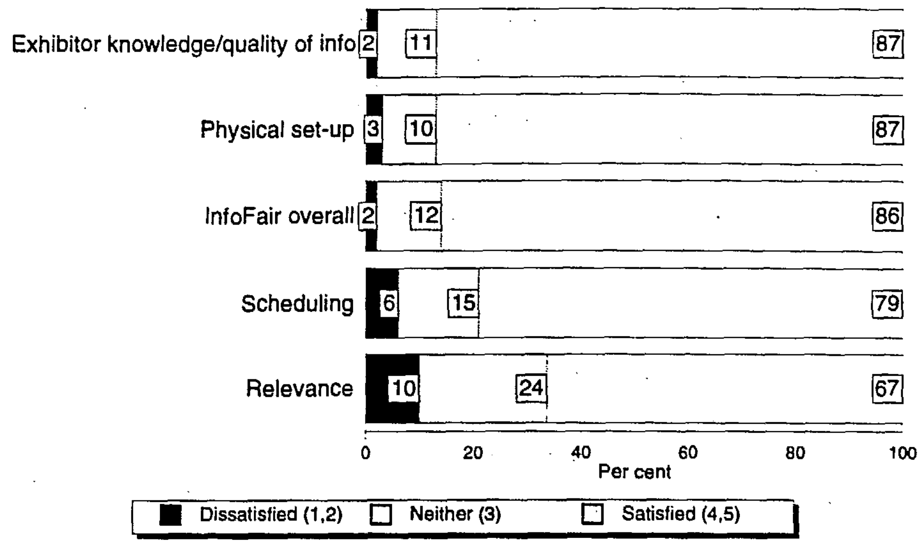
SME Conferences and InfoFairs Evaluation

(c) Seminars

Among seminar attendees interviewed at the events, satisfaction levels were generally high with four in five or better saying they were satisfied with the physical set-up, quality of information received and effectiveness of the seminar leaders. Again the lowest score was for the relevance of the seminar to participants' business, although still two in three said they were satisfied with this measure (Exhibit 2.6).

EXHIBIT 2.5
InfoFair Satisfaction

"How satisfied were you with the following elements of the InfoFair?"



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n=498

SME Conferences and InfoFairs Evaluation

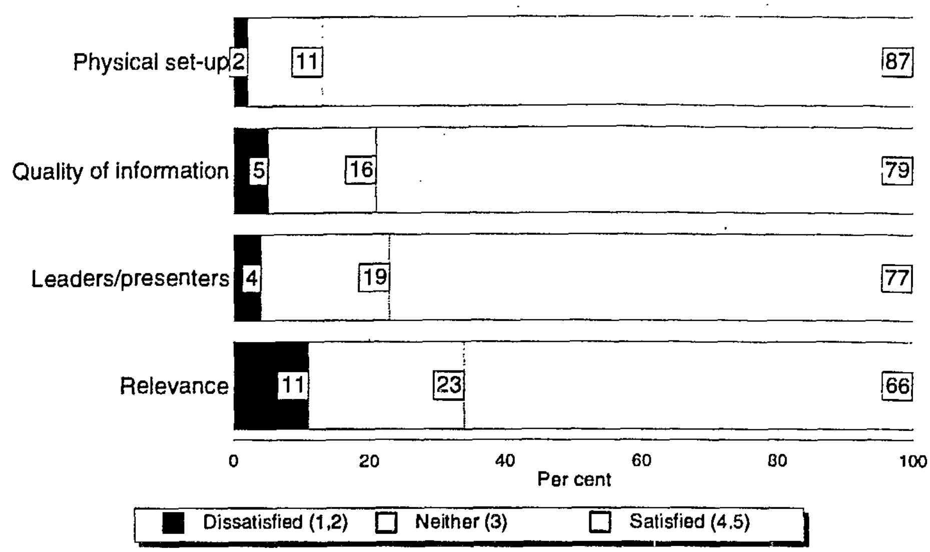
Exhibitors' Evaluation

The clear consensus from the 25 exhibitor interviews conducted was that the events were a success albeit with a number of different rationales and on a number of different levels.

Most exhibitors were fairly lavish in their praise of the events as an opportunity to meet the clients their respective programs are designed to serve. Echoing comments expressed by attendees in focus groups, several exhibitors felt that they had established a "link" into government whereby clients would have a greater comfort level in conducting follow-up contacts. Exhibitors at both HRDC and Revenue Canada indicated that they had in fact already had follow-up contacts with clients they

EXHIBIT 2.6
Seminar Satisfaction

"How satisfied were you with the following elements of the seminar(s)?"



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n=122

SME Conferences and InfoFairs Evaluation

had encountered at the InfoFairs.

Other exhibitors, notably in the Industry Sector branch, felt that the events had done little in terms of establishing new client contacts but had offered an opportunity to showcase government initiatives to a broader public audience.

As a broad conclusion, those exhibitors involved in technology-intensive programs felt the events were "casting the net too wide" in terms of offering an opportunity to meet potential clients. Several of these exhibitors felt the events were not, in fact, the best use of resources for promoting their programs. They expressed a preference to see a greater focus on sector specific trade shows and events.

Also mentioned by several exhibitors (as well as a number of attendees) was the mix of business size (i.e., micros and "true" SMEs) may have detracted from the overall utility of the events. The sense among these exhibitors was that their efforts were to some extent being diffused across a fairly broad audience base.

Few exhibitors, however, felt the events were too onerous in terms of demands on their time in both preparing for and attending the InfoFairs.

With few exceptions, the exhibitors interviewed stated that they would gladly participate in additional events. Again, the intangible element expressed by attendees was raised by a number of exhibitors. Simply put, the events offered a chance to demonstrate the government's commitment to the SME community.

Specific Comments

Satisfaction with the overall logistics of the event was also fairly high. One exhibitor who had attended events in several regions noted that the Quebec events offered a more consistent feel and allocation of space and suggested a broader use of that set-up.

The cost of the events was a concern raised by several of those interviewed. Travel, preparation time and particularly the cost of materials distributed at the events — "... it was a bit of a free-for-all ... people were picking up pamphlets they would clearly never read just because they were there ..." — were seen as perhaps excessive. Some felt that mechanisms to limit financial resources devoted to the events would be useful in order to maximize other promotional activities.

APPENDIX B
Telephone Questionnaires
(Spring and Fall)

Ekos Research Associates Inc., 1999

Industry Portfolio
SME Conferences and InfoFairs
Telephone Questionnaire — Spring

Hello, my name is ... and I work for Ekos Research Associates. We have been hired to conduct of survey of small business people like yourself who attended the conference and information fair held in [import city and date]. The interview is totally voluntary and all of your responses will be kept strictly confidential. The interview will take approximately 10 minutes to complete. May I begin?

1. **How would you rate your overall satisfaction with the event. Please rate your response on a 7-point scale, where 1 means extremely dissatisfied, 7 means extremely satisfied and the midpoint 4 means neither.**

Extremely Dissatisfied			Neither			Extremely Satisfied
1	2	3	4	5	6	7

2. **To the best of your knowledge, who was the main organizer of the event?**

Federal government	1
Other level of government	2
Chamber of Commerce	3
Other (specify) ______	4
DK/NR	9

3. **How helpful has the event been in each of the following areas? Please rate your response on a 7-point scale, where 1 means not at all helpful, 7 means extremely helpful and the midpoint 4 means somewhat helpful.**

	Not At All Helpful			Somewhat Helpful			Extremely Helpful
a. *Increasing your understanding of federal government programs and services for small business*	1	2	3	4	5	6	7
b. *Helping you in the day-to day managing of your business*	1	2	3	4	5	6	7
c. *Increasing your understanding of technology and innovation issues as they relate to your business*	1	2	3	4	5	6	7

	Not At All Helpful			Somewhat Helpful			Extremely Helpful
d. *Establishing new business contacts*	1	2	3	4	5	6	7
e. *Helping you create or revise a strategic plan for your business*	1	2	3	4	5	6	7
f. *Increasing your awareness of federal government programs to help Canadian businesses get connected to the Internet*	1	2	3	4	5	6	7
g. *(If "thinking about starting a business" from intercept questionnaires) Helping you plan your business*	1	2	3	4	5	6	7

4.a. **Have you followed up with any of the InfoFair exhibitors for additional information or services?**

Yes 1
No 2
DK/NR 9

4.b. **Which ones?**

---

5. **Which of the following was the MAIN goal of your follow-up contact?**

Acquiring additional general information 1
Acquiring additional information about a specific program 2
Conducting business/transactions 3
DK/NR 9

6.a. **Have you visited any Internet sites you learned about at the InfoFair?**

Yes 1
No 2
DK/NR 9

6.b. Which ones?

7. How optimistic would you say you are about each of the following? Please rate your response on a 7-point scale, where 1 means extremely pessimistic, 7 means extremely optimistic and the midpoint 4 means neither.

	Extremely Pessimistic			Neither			Extremely Optimistic
a. *Your personal economic prospects*	1	2	3	4	5	6	7
b. *The success of your business*	1	2	3	4	5	6	7
c. *The Canadian economy*	1	2	3	4	5	6	7

8. There are a number of challenges facing small and medium sized-businesses. Thinking not just of today but over the NEXT FIVE YEARS, what priority should the federal government place on each of the following areas? Please rate your response on a 7-point scale where 1 means the lowest priority, 7 means the highest priority and the midpoint 4 means middle priority.

	Lowest Priority			Middle Priority			Highest Priority
a. *Providing information on Canadian markets and competition*	1	2	3	4	5	6	7
b. *Providing information on international markets and exporting*	1	2	3	4	5	6	7
c. *Simplifying government regulations and reducing paper burden*	1	2	3	4	5	6	7
d. *Providing information to help more small businesses get started*	1	2	3	4	5	6	7
e. *Working with banks to help secure financing for small businesses*	1	2	3	4	5	6	7
f. *Providing information to help small businesses get connected to the Internet*	1	2	3	4	5	6	7

	LOWEST PRIORITY			MIDDLE PRIORITY			HIGHEST PRIORITY
g. *Providing financial assistance to small businesses for research and development* ...	1	2	3	4	5	6	7

9. **There are a number of ways in which the federal government currently provides information to small businesses. Which of the following would you say is MOST useful in terms of getting information from the federal government?**

Internet 1
1-800 telephone numbers 2
Written publications (like pamphlets and brochures) 3

*Other (specify)*__________ .. 4

I'd like to ask you a few questions about computer systems.

10. **Are you aware of a problem facing computer systems relating to the year 2000?**

Yes 1
No 2
DK/NR 9

11. *(If aware of year 2000 issue)* **How serious a problem do you feel this "year 2000 situation" is for your business? Please rate your response on a 7-point scale where 1 means not at all a problem, 7 means an extremely serious problem and the midpoint 4 means neither.**

NOT AT ALL A PROBLEM			NEITHER			EXTREMELY SERIOUS
1	2	3	4	5	6	7

12. *(If aware of year 2000 issue)* **Have you taking any steps to deal with this year 2000 situation?**

Yes, but still just looking into it 1
Yes, revising our systems 2
Yes, dealing with suppliers 3
Yes, dealing with customers 4

*Other (specify)*__________ . 5
DK/NR 9

Now I have a last few questions to be used for statistical purposes only.

13. **What is the highest level of schooling that you have completed?**

Public/Elementary school or less (grade 1-8)	01
Some high school	02
Graduated from high school (grade 12-13)	03
Vocational/Technical college or CEGEP	04
Trade certification	05
Some university	06
Bachelor's degree	07
Professional certification	08
Graduate degree	09
DK/NR	99

14. **How many employees are currently employed in your business, including full-time, part-time and seasonal workers?**

|__|__|__| FULL-TIME

|__|__|__| PART-TIME

|__|__|__| SEASONAL

15. **Do you anticipate hiring any new employees in the coming year?**

Yes	1
No	2
DK/NR	9

16. **Does your firm currently export any of your goods or services outside of Canada?**

Yes	1
No	2
DK/NR	9

17. **In what year were you born?**

|__|__|__|__| YEAR

18. **What is your annual business income from all sources before taxes?**

____

(Do not ask — is respondent male or female?)

THANK YOU FOR YOUR COOPERATION AND TIME!

SME InfoFair Survey - Fall

```
<fname                        > <lname                         >
<iarea > <itele      >
Hello, my name is ______ and I work for Ekos Research Associates. We have been
Hired to conduct a survey of small business people like yourself who attended
the conference and information fair hosted in <event                          >
on <idate      >. The interview is totally voluntary and all of your responses
will be kept strictly confidential. The interview will take approximately 12
minutes to complete. May I begin?

           1  yes
           2  no--end
           @intro
```

INTRO

intro screen

01	yes	1	
02	no	2	=> INT

Q1

Did you attend the event?

01	Yes	1	
02	No	2	=> INT

Q2

Before we begin, which of the following applies to you?

01	I own a small business	1
02	I am an employee in a small business	2
03	I am thinking about starting a small business	3
04	None of the above	4
05	DK/NR	9

MESSAGE: Note to interviewers - we want to screen out government employees, people who work for banks in small business loan areas, event organizers, etc.
=> +1 if NOT Q2=#1-#3

R1

Did you attend the event in a professional capacity (as in working at the event) or out of interest?

01	Professional capacity <Thank and terminate>	1
02	Out of interest <Continue>	2
05	DK/NR	9

Q3

HOW WOULD YOU RATE YOUR OVERALL SATISFACTION WITH THE EVENT? PLEASE RATE YOUR RESPONSE ON A 7-POINT SCALE, WHERE 1 MEANS EXTREMELY DISSATISFIED, 7 MEANS EXTREMELY SATISFIED AND THE MIDPOINT 4 MEANS NEITHER.

01 1 EXTREMELY DISSATISFIED 1
02 2 2
03 3 3
04 4 NEITHER 4
05 5 5
06 6 6
07 7 EXTREMELY SATISFIED 7
08 DK/NR 9

MESSAGE: CHECK ALL THAT APPLY

Q3A

There were three main elements of the event, a conference with a presentation, the information fair with exhibitors and seminars on specific topics. Which elements of the event did you attend?

Conference 1
Information fair 2
Seminar 3
dk/nr 9

Q3B

How would you rate your overall satisfaction with the conference? Please rate your response on a 7-point scale, where 1 means extremely dissatisfied, 7 means extremely satisfied and the midpoint 4 means neither.

01 1 Extremely dissatisfied 1
02 2 2
03 3 3
04 4 Neither 4
05 5 5
06 6 6
07 7 Extremely satisfied 7
08 dk/nr 9

Q3C

How would you rate your overall satisfaction with the information fair? Please rate your response on a 7-point scale, where 1 means extremely dissatisfied, 7 means extremely satisfied and the midpoint 4 means neither.

01 1 Extremely dissatisfied 1
02 2 2
03 3 3
04 4 Neither 4
05 5 5
06 6 6
07 7 Extremely satisfied 7
08 dk/nr 9

Q3D

HOW WOULD YOU RATE YOUR OVERALL SATISFACTION WITH THE SEMINAR(S). PLEASE RATE YOUR RESPONSE ON A 7-POINT SCALE, WHERE 1 MEANS EXTREMELY DISSATISFIED, 7 MEANS EXTREMELY SATISFIED AND THE MIDPOINT 4 MEANS NEITHER.

01	1 EXTREMELY DISSATISFIED	1
02	2	2
03	3	3
04	4 NEITHER	4
05	5	5
06	6	6
07	7 EXTREMELY SATISFIED	7
08	DK/NR	9

Q4

To the best of your knowledge, who was the main organizer of the event?

01	Federal Government	1
02	Other level of government	2
03	Chamber of Commerce	3
04	Other	7
05	DK/NR	9

Q5

How helpful has the event been in each of the following areas? Please rate your response on a 7-point scale, where 1 means not at all helpful, 7 means extremely helpful and the midpoint 4 means somewhat helpful.

Q5A

MESSAGE: How helpful has the event been in
Increasing your understanding of federal government programs and services for small business

01	1 Not at all helpful	1
02	2	2
03	3	3
04	4 Somewhat helpful	4
05	5	5
06	6	6
07	7 Extremely helpful	7
08	DK/NR	9

Q5B

=> +1 if NOT Q2=#1-#2
MESSAGE: How helpful has the event been in
Helping you in the day-to day managing of your business

01	1 Not at all helpful	1
02	2	2
03	3	3
04	4 Somewhat helpful	4
05	5	5
06	6	6
07	7 Extremely helpful	7
08	DK/NR	9

Q5C

=> +1 if NOT Q2=#1-#2
MESSAGE: How helpful has the event been in
Increasing your understanding of technology and innovation issues as they relate to your business

01	1 Not at all helpful	1
02	2	2
03	3	3
04	4 Somewhat helpful	4
05	5	5
06	6	6
07	7 Extremely helpful	7
08	DK/NR	9

Q5D

MESSAGE: How helpful has the event been in
Establishing new business contacts

01	1 Not at all helpful	1
02	2	2
03	3	3
04	4 Somewhat helpful	4
05	5	5
06	6	6
07	7 Extremely helpful	7
08	DK/NR	9

Q5E

=> +1 if NOT Q2=#1-#2
MESSAGE: How helpful has the event been in
Helping you create or revise a strategic plan for your business

01	1 Not at all helpful	1
02	2	2
03	3	3
04	4 Somewhat helpful	4
05	5	5
06	6	6
07	7 Extremely helpful	7
08	DK/NR	9

Q5F

=> +1 if NOT Q2=#1-#2
MESSAGE: How helpful has the event been in
Increasing your awareness of federal government programs to help Canadian businesses get connected to the Internet

01	1 Not at all helpful	1
02	2	2
03	3	3
04	4 Somewhat helpful	4
05	5	5
06	6	6
07	7 Extremely helpful	7
08	DK/NR	9

Q5G

=> +1 if NOT Q2=#3
MESSAGE: How helpful has the event been in
Helping you plan your business

01	1 Not at all helpful	1
02	2	2
03	3	3
04	4 Somewhat helpful	4
05	5	5
06	6	6
07	7 Extremely helpful	7
08	DK/NR	9

Q6

Have you followed up with any of the InfoFair exhibitors for additional information or services?

01	Yes	1
02	No	2
03	DK/NR	9

Q7

=> +1 if NOT Q6=#1

Which ones?

01	please specify	1
02	dk/nr	9
03	INDUSTRY PORTFOLIO	2
04	OTHER FEDERAL GOVERNMENT	3
05	OTHER	4

Q8

=> +1 if NOT Q6=#1

Which of the following was the MAIN goal of your follow-up contact?

01	Acquiring additional general information	1
02	Acquiring additional information about a specific program	2
03	Conducting business/transactions	3
04	Other	7
05	DK/NR	9

Q9

Have you visited any Internet sites you learned about at the InfoFair?

01	Yes	1
02	No	2
03	DK/NR	9

Q10

=> +1 if NOT Q9=#1

Which ones?

01	please specify	1
02	dk/nr	9
03	STRATEGIS	2
04	OTHER INDUSTRY PORTFOLIO	3
05	OTHER FEDERAL GOVERNMENT	4
06	OTHER	5

Q11

I'd like to ask you a few questions on some more general issues.

PRQ11

How optimistic would you say you are about each of the following? Please rate your response on a 7-point scale, where 1 means extremely pessimistic, 7 means extremely optimistic and the midpoint 4 means neither.

Q11A

MESSAGE: How optimistic are you about...
Your personal economic prospects

01	1 Extremely pessimistic	1
02	2	2
03	3	3
04	4 Neither	4
05	5	5
06	6	6
07	7 Extremely optimistic	7
08	DK/NR	9

Q11B

=> +1 if NOT Q2=#1-#2
MESSAGE: How optimistic are you about...
The success of your business

01	1 Extremely pessimistic	1
02	2	2
03	3	3
04	4 Neither	4
05	5	5
06	6	6
07	7 Extremely optimistic	7
08	DK/NR	9

Q11C

MESSAGE: How optimistic are you about...
The Canadian economy

01	1 Extremely pessimistic	1
02	2	2
03	3	3
04	4 Neither	4
05	5	5
06	6	6
07	7 Extremely optimistic	7
08	DK/NR	9

Q12

There are a number of challenges facing small and medium sized-businesses. Thinking not just of today but over the NEXT FIVE YEARS, what priority should the federal government place on each of the following areas? Please rate your response on a 7-point scale where 1 means the lowest priority, 7 means the highest priority and the midpoint 4 means middle priority.

Q12A

MESSAGE: What priority should the federal government place on...
Providing information on Canadian markets and competition

01	1 Lowest priority	1
02	2	2
03	3	3
04	4 Middle priority	4
05	5	5
06	6	6
07	7 Highest priority	7
08	DK/NR	9

Q12B

MESSAGE: What priority should the federal government place on...
Providing financial assistance to small businesses for research and development

01	1 Lowest priority	1
02	2	2
03	3	3
04	4 Middle priority	4
05	5	5
06	6	6
07	7 Highest priority	7
08	DK/NR	9

Q12C

MESSAGE: What priority should the federal government place on...
Providing information on international markets and exporting

01	1 Lowest priority	1
02	2	2
03	3	3
04	4 Middle priority	4
05	5	5
06	6	6
07	7 Highest priority	7
08	DK/NR	9

Q12D

MESSAGE: What priority should the federal government place on...
Simplifying government regulations and reducing paper burden

01	1 Lowest priority	1
02	2	2
03	3	3
04	4 Middle priority	4
05	5	5
06	6	6
07	7 Highest priority	7
08	DK/NR	9

Q12E

MESSAGE: What priority should the federal government place on...
Working with banks to help secure financing for small businesses

01	1 Lowest priority	1
02	2	2
03	3	3
04	4 Middle priority	4
05	5	5
06	6	6
07	7 Highest priority	7
08	DK/NR	9

Q12F

MESSAGE: What priority should the federal government place on...
Providing information to help small businesses get connected to the Internet

01	1 Lowest priority	1
02	2	2
03	3	3
04	4 Middle priority	4
05	5	5
06	6	6
07	7 Highest priority	7
08	DK/NR	9

Q13

There are a number of ways in which the federal government currently provides information to small businesses. Which of the following would you say is MOST useful in terms of getting information from the federal government?

01	Internet	1
02	1-800 telephone numbers	2
03	Written publications (like pamphlets and brochures)	3
04	Other (specify)	7
05	DK/NR	9

QINN

=> +1 if NOT Q2=#1-#2

How frequently would you say you take innovative approaches to your business? By innovative I mean significantly improving your products or services or improving production, marketing, inventory or delivery processes. Would you say ...

01	1 Rarely	1
02	2	2
03	3	3
04	4 Sometimes	4
05	5	5
06	6	6
07	7 Constantly innovating	7
08	DK/NR	9

QIN2

=> +1 if NOT Q2=#1-#2

How important do you think innovation is to the competitiveness of YOUR business? Would you say it is ...

01	1 Not at all important	1
02	2	2
03	3	3
04	4 Somewhat important	4
05	5	5
06	6	6
07	7 Extremely important	7
08	DK/NR	9

QIN3

=> +1 if NOT Q2=#1-#2 and #4-6 in QINN

How would you say that innovations generally happen in your business? Would you say it is more...

A result of new or improved technologies	1
A result of problems that come up and need to be fixed	2
Creative new ideas for improvements	3
Other factors	4
DK/NR	9

PRQ14

I'd like to ask you a few questions about computer systems.

Q14

Are you aware of a problem facing computer systems relating to the year 2000?

01	Yes	1
02	No	2
03	DK/NR	9

Q15

=> Q17 if NOT Q2=#1,#2 OR NOT Q14=#1

How serious a problem do you feel this "year 2000 situation" is for YOUR BUSINESS? Please rate your response on a 7-point scale where 1 means not at all a problem, 7 means an extremely serious problem and the midpoint 4 means neither.

01	1 Not at all a problem	1
02	2	2
03	3	3
04	4 Neither	4
05	5	5
06	6	6
07	7 Extremely serious problem	7
08	DK/NR	9

Q16

Have you taking any steps to deal with this year 2000 situation?

01	Yes, but still just looking into it	1
02	Yes, revising our systems	2
03	Yes, dealing with suppliers	3
04	Yes, dealing with customers	4
05	No steps taken	5
06	Other	7
07	DK/NR	9

QY2K

(If 1-4 in Q15) What would you say is the MAIN reason you do not feel the Year 2000 situation represents a problem for your business?

01	Already sure our systems are Y2K compliant	1
02	Believe the whole problem has been exaggerated	2
03	Systems not an integral part of our business	3
06	Other (specify)	7
07	DK/NR	9

Q17

Now I have a last few questions to be used for statistical purposes only.

EC11

What is the highest level of schooling that you have completed?

01	Public/Elementary school or less (grade 1-8)	01
02	Some high school	02
03	Graduated from high school (grade 12-13)	03
04	Vocational/Technical college or CEGEP	04
05	Trade certification	05
06	Some university	06
07	Bachelor's degree	07
08	Professional certification	08
09	Graduate degree	09
10	DK/NA	99

Q18

=> +1 if NOT Q2=#1-#2

How many employees are currently employed in your business, including full-time, part-time and seasonal workers?

01	dk/nr	999

Q19

=> +1 if NOT Q2=#1-#2

Do you anticipate hiring any new employees in the coming year?

01	Yes	1
02	No	2
03	DK/NR	9

Q20

=> +1 if NOT Q2=#1-#2

Does your firm currently export any of your goods or services outside of Canada?

01	Yes	1
02	No	2
03	DK/NR	9

Q21

In what year were you born?

01	dk/nr	99

Q22

=> +1 if NOT Q21==99

(If they won't give you their year of birth ask if they fall into any of the following categories:)

01	16-29 years of age	01
02	30-34	02
03	35-39	03
04	40-44	04
05	44-49	05
06	50-54	06
07	55-59	07
08	60-64	08
09	65 or older	09
10	DK/NR	99

Q23

What is your annual BUSINESS income from all sources before taxes?

01	less than $20,000	1
02	$20,000 - 39,999	2
03	$40.000 - $59,999	3
04	$60,000 - $79,999	4
05	$80,000 - $99,999	5
06	$100,000 - $125.000	6
07	$125,000 - $150,000	7
08	Over $150,000	8
09	DK/NR	9

Q24

=> +1 if NOT Q2=#1-#2

The business you own or work for has been in operation for ...

01	Less than 1 year	1
02	1 to 5 years	2
03	Over 5 years	3
04	DK/NR	9

Q25

=> +1 if NOT Q2=#1-#2

Which of the following best describes the type of business you are in?

01	Retail	1
02	Wholesale/distribution	2
03	Consulting	3
04	Service	4
05	Manufacturing	5
06	Other	7
07	DK/NR	9
08	AGRICULTURE/RESOURCES	8

Q26

Do you have access to a personal computer?

01	Yes	1
02	No	2
03	Don't know	9

Q27

=> +1 if NOT Q26=#1

Do you have access to the Internet?

01	Yes	1
02	No	2
03	DK/NR	9

QEC1

=> +1 if NOT Q27=#1

Do you use the Internet to help you in your business?

01	Yes	1
02	No	2
03	DK/NR	9

QEC2

=> +1 if NOT QEC1=#1

How frequently would you say you use the Internet for each of the following work-related activities?

QECA

Research and product development

01	1 Never	1
02	2	2
03	3	3
04	4 Sometimes	4
05	5	5
06	6	6
07	7 All the time	7
08	DK/NR	9

QECB

Communicating with customers or suppliers

01	1 Never	1
02	2	2
03	3	3
04	4 Sometimes	4
05	5	5
06	6	6
07	7 All the time	7
08	DK/NR	9

QECC

Selling your products or services

01	1 Never	1
02	2	2
03	3	3
04	4 Sometimes	4
05	5	5
06	6	6
07	7 All the time	7
08	DK/NR	9

QECD

Communicating with government officials

01	1 Never	1
02	2	2
03	3	3
04	4 Sometimes	4
05	5	5
06	6	6
07	7 All the time	7
08	DK/NR	9

QECE

Making purchases from suppliers

01	1 Never	1
02	2	2
03	3	3
04	4 Sometimes	4
05	5	5
06	6	6
07	7 All the time	7
08	DK/NR	9

QIH1

How likely do you think it is that you will make increased use of the Internet for running your business over the next year or so?

01	1 Not at all likely	1
02	2	2
03	3	3
04	4 Somewhat likely	4
05	5	5
06	6	6
07	7 Extremely likely	7
08	DK/NR	9

QIH2

And what about over the next five years or so?

01	1 Not at all likely	1
02	2	2
03	3	3
04	4 Somewhat likely	4
05	5	5
06	6	6
07	7 Extremely likely	7
08	DK/NR	9

QWEB

=> +1 if NOT Q27=#1 and NOT Q2=#1-#2

Does the business you work for have a web page on the Internet?

01	Yes	1
02	No	2
03	DK/NR	9

THNK

Thank-you for your cooperation and time.

01	Hit enter	1

APPENDIX C
Focus Group Guides
(Spring and Fall)

Ekos Research Associates Inc., 1999

Industry Portfolio
SME Conferences and InfoFairs
Moderator's Guide — Spring

Introduction (10 minutes)

- ❑ Purpose of research and study sponsors
- ❑ Discussion being audio taped, observers — confidentiality of results
- ❑ No right or wrong answers, purpose is to get frank opinion about issues
- ❑ Role of moderator:
  - raise issues for discussion
  - probe for clarification
  - watch for time
- ❑ Participants introduce themselves, including type of business they run, length of time in business

Broader SME Context/Warm up (20 minutes)

- ❑ How would you describe the environment for small business in Canada today?
  - Compared to five years ago?
  - Different in your region?
  - Different for you particular business/sector?
- ❑ What are the most positive elements of running your own small business/working in a small business?
- ❑ What about challenges?

Conference/InfoFair (60 minutes)

I'd like to talk about the event you recently attended.

- ❑ Which parts of the event did you attend? (prompt for Conference, InfoFair, Seminars)
- ❑ What were your overall impressions of the event?
  - How would you describe the event?
  - How helpful was it to you and your business?
  - What images stand out most in your mind about the event?
  - Which elements were of the greatest interest to you?
  - How does it compare to other events aimed at the small business community? (In terms of information available, expertise of exhibitors)
- ❑ Have you followed up with any exhibitors?
  - Probes: Which ones? When did you follow up?
- ❑ Do you think you will be following up with any of the exhibitors?
- ❑ Do you remember who organized the event?
  - (Prompt) Federal government overall? Chambers of Commerce?
- ❑ Do you think the federal government should continue to hold events like this?
  - Why/why not?
  - Should they do anything differently?
  - More information? What kinds?
  - Any other specific elements that should be changed? (location? scheduling?)

Government Support for SMEs (20 minutes)

- Did you learn much about government support for small businesses like yours?

- Now that you have attended this event, do you think you have a good understanding of federal government support for small businesses?

  - What kinds of support would be important to you? [Moderator goes around table for list]
  - Do you think this support is available now?
  - Should they work on developing other kinds of support?
  - How important do you think the SME community is to the Canadian economy?
  - Do you think the success of businesses like yours are important to the federal government? Why? (Job creation, overall health of the economy).

Wrap-up (10 minutes)

- Final comments/Questions from observers

Industry Portfolio
SME Conferences and InfoFairs
Moderator's Guide — Fall

Introduction (5 minutes)

- Purpose of research is to obtain the feedback of people who attended the events aimed at small businesses. Research is being conducted on behalf of the Government of Canada.
- Groups are being audio-taped and [if applicable] observed by members of the research team. Your comments remain confidential.
- Please try to speak one at a time.
- There aren't any right or wrong answers to the things we'll be talking about — we're just looking for your honest opinions.
- It's ok to disagree. Please speak up even if you think you're the only one who feels a certain way about an issue. It's also ok, though, if you change your mind based on things you hear or new information.
- Moderator's role: raise issues for discussion, watch for time, make sure everyone has a chance to speak.
- Please introduce yourselves — first name and a little bit about the type of business you're involved in or what your hopes for a business venture are.

Broader SME Context/Warm up (15 minutes)

- How would you describe the environment for small business in Canada today?
- Compared to five years ago?
- Is it different in your region?
- Different for you particular business/sector?

- What are the most positive elements of running your own small business/working in a small business?

- What about challenges?

Conference/InfoFair (55 minutes)

I'd like to talk about the event you recently attended.

- Which parts of the event did you attend? (prompt for Conference, InfoFair, Seminars)

- What were your overall impressions of the event?

- How would you describe the event?

- How helpful was it to you and your business?

- What images stand out most in your mind about the event?

- Which elements were of the greatest interest to you?

- How does it compare to other events aimed at the small business community? (In terms of information available, expertise of exhibitors)

- Do you think the federal government should continue to hold events like this?

- Why/why not?

- Should they do anything differently?

- More information? What kinds?

- Any other specific elements that should be changed? (location? scheduling? targeting events by sector/size of business?)

- Have you followed up with any exhibitors?

- Probes: Which ones? When did you follow up?

- Do you think you will be following up with any of the exhibitors?

- For those who have access to the Internet, have you visited any websites you learned about at the event?

- Probes: Which ones? When did you follow up?
- What do you think about the Internet as a way of getting information from the government to small businesses like yourselves? Is it a good way to communicate?
- What about for you to communicate with the government? Has anyone used the Internet or e-mail to deal with the government? What for?
- Do you think this is something the government should focus on, using the Internet as a way of dealing with small businesspeople?
- What would some of the advantages be? What about down sides?
- What are some new things you think the government could use the Internet for?

SME Guide (15 minutes)

- ❑ [Moderator holds up copy of guide to government services for SMEs] Did everyone who was at the event get a copy of this guide?
- What were your overall impressions of this guide? Is it a useful collection of government assistance to SMEs?
- Is it easy to find information in the guide?
- Are there things that are missing from this publication?
- ❑ [If not already volunteered] Has anyone actually used the guide since the event? What for/was it helful to you?
- ❑ The guide will be updated over the next year or so, do you have any suggestions about how it could be made more useful to small business people like yourselves?

Innovation (25 minutes)

- ❑ Now I'd like to talk for a bit about the issue of *innovation*. When I say the word "innovation" what are the first images that come to mind?

  PROBE: New ideas, change, progress

- What do you think innovation means to Canadian businesses? What about to small businesses?

- Can you give me some examples of what being innovative means in a business sense?

  PROBE: changing or improving processes, products or product lines, marketing, delivery, etc.

- Thinking about small businesses in general, is it really important to be "innovative" or can you be successful just by working hard/doing a good job for your customers?

- What about your business specifically? What role would you say innovation plays in making you competitive/successful?

- What are some of the ways in which you would say you have been innovative in your business?

- What led you to take these actions?

  PROMPTS: fixing problems that came up, trying to be more competitive, new technologies becoming available, etc.

- What would you need to be more innovative?

  PROBE: access to more information, networks of resources, access to capital

- We talked earlier about using the Internet as a way of communicating with the government, what about other business related uses?

- How many people use the Internet for their work? (PROMPTS: communicating with suppliers or clients, having a Web site, selling products on-line, buying from suppliers on-line, doing research for your business, etc.)

- For those of who are making use of the Internet for your business, how important a tool is it for you?

- Is there anything that acts as a barrier or a deterrent from making greater use of it? (PROMPTS: move quickly over skills/abilities, technical issues — try to focus around privacy, security, regional access, etc.)

Wrap-up (5 minutes)

- Questions from observers
- Do you have anything else you would you like to add on the issues we talked about tonight?

THANK YOU VERY MUCH FOR YOUR PARTICIPATION

APPENDIX D
Intercept Questionnaire
(Spring)

Ekos Research Associates Inc., 1999

Industry Portfolio
SME Conference and InfoFair Intercept Questionnaire

Date: ____________________ **Location:** ______________________________________

(Note: the date and location should be inserted by event organizers prior to printing)

Hello. My name is ___________. I am conducting a short survey on behalf of the event organizers. May I take a few minutes and ask you some questions about today's event? All your responses are kept strictly confidential. May I begin?

I. SCREENING CRITERIA

1. Which of the following elements of today's event have you attended? *[Check all that apply.]*

Conference	1
InfoFair	2
Seminar	3

INTERVIEWERS: COMPLETE EACH APPLICABLE SECTION FOR ELEMENT ATTENDED

II. CONFERENCE ATTENDEES

2. I'd like you to rate your satisfaction with each of the following aspects of the conference on a scale from 1 to 5, where 1 means very dissatisfied and 5 is very satisfied. *[Circle number given.]*

	Very Dissatisfied		Neither		Very Satisfied
a. *Keynote speech*	1	2	3	4	5
b. *Presentations by local business people*	1	2	3	4	5
c. *Question and answer period*	1	2	3	4	5
d. *Overall relevance to your business*	1	2	3	4	5
e. *Satisfaction with the conference as a whole*	1	2	3	4	5

III. INFOFAIR ATTENDEES

3. **Which of the following would say was your *main* motivation for coming to the InfoFair?** *[Circle one only.]*

*To obtain **information** on running or setting up a small business*	1
*To learn about government **programs and services** for small businesses*	2
To make business contacts	3
To conduct a specific transaction or discuss a case with a government official	4
General interest	5
Other (please specify) ______	6
Don't know/No specific motivation	9 -> **SKIP TO Q. 5**

4. **I'd like you to tell me the extent to which your expectations of the InfoFair were met in terms of your main motivation for coming. Please use a scale from 1 to 5, where 1 means your expectations were not at all met, 5 means your expectations were very much exceeded, and the mid-point 3 means your expectations were met.** *[Circle one only.]*

Not at All Met		Met		Very Much Exceeded
1	2	3	4	5

5. **How did you *first* hear about the InfoFair?** *[Read categories only if asked. Circle one only.]*

In the newspaper	01
On TV/radio	02
Promotional poster	03
Pamphlet	04
From an Internet site	05
Colleague or friend	06
Letter of invitation from an MP/Minister	07
Letter of invitation from a professional/business association	08
Walking by/happened to see event	09 -> **SKIP TO Q. 7**
Other (please specify) ______	10
Don't know/don't remember	11 -> **SKIP TO Q. 7**

6. **Do you recall hearing about the InfoFair anywhere else?** *[Do not read Categories.]*

In the newspaper	1
On TV/radio	2
Promotional poster	3
Pamphlet	4
From an Internet site	5
Colleague or friend	6
Letter of invitation from an MP/Minister	7
Letter of invitation from a professional/business association	8
Don't know/didn't hear about InfoFair anywhere else	9

7. **Do you plan to follow up with any of the exhibitors here today for additional information or services?** *[Circle one only.]*

Yes	1	
No	2	**-> SKIP TO Q. 9**
Don't know	9	**-> SKIP TO Q. 9**

8. **Which ones?**

9. **Do you plan to visit any Internet sites you learned about today?** *[Circle one only.]*

Yes	1
No	2
Don't know	9

9.a. **If yes, which ones?**

____

____

10. **I'd like you to rate your satisfaction with each of the following aspects of the InfoFair on a scale from 1 to 5, where 1 means very dissatisfied and 5 is very satisfied.** *[Circle number given.]*

	Very Dissatisfied		Neither		Very Satisfied
a. *Knowledge of exhibitors and quality of information available*	1	2	3	4	5
b. *Relevance to your business*	1	2	3	4	5
c. *Overall satisfaction with InfoFair*	1	2	3	4	5

IV. SEMINAR ATTENDEES

11. **Which seminar(s) did you attend?** *(Note: the names of each seminar should be inserted by organizers.) [Circle all that apply.]*

12. **I'd like you to rate your satisfaction with each of the following Seminar elements on a scale from 1 to 5, where 1 means very dissatisfied and 5 is very satisfied.** *[Circle number given.]*

	Very Dissatisfied		Neither		Very Satisfied
a. *Quality of the information received*	1	2	3	4	5
b. *Relevance to your business*	1	2	3	4	5

V. DEMOGRAPHICS

These last few questions are about the type of business you are involved in and are for statistical purposes only.

13. **Which of the following applies to you?** *[Circle one only.]*

I own a small business	1	
I am an employee in a small business	2	
I am thinking about starting a small business	3	**-> SKIP TO Q. 15**
None of the above	4	**-> SKIP TO Q. 16**

14. **The business you own or work for has been in operation for ...** *[Circle one only.]*

Less than one year	1
Between one and five years	2
For over five years	3

15. **Which of the following best describes the type of business you are in or considering?** *[Circle one only.]*

Retail	1
Wholesale/distribution	2
Consulting	3
Service	4
Manufacturing	5
Other (please specify) ______________________	6
Not in or considering starting a business	9

16. **Are you a full or part-time student?** *[Circle one only.]*

Yes, full-time student	1
Yes, part-time student	2
No	3

17. **Do you have access to a personal computer?** *[Circle one only.]*

Yes	1	
No	2	**-> SKIP TO Q. 19**
Don't know	9	**-> SKIP TO Q. 19**

18. **Do you have access to the Internet?** *[Circle one only.]*

Yes	1
No	2
Don't know	9

19. **Do you have any other comments about today's event that you would like to make?**

____

____

20. We are interested in following up with some participants and getting more feedback on these events. It would be an opportunity for you to express your views on government programs and services for small businesses. Would I be able to get your name and telephone number so that someone can call you in a few weeks?

Name: ______________________ Telephone: ______________________

THANK YOU VERY MUCH FOR YOUR TIME!

APPENDIX E
Exhibitors Interview Guide
(Spring)

Ekos Research Associates Inc., 1999

Industry Portfolio
SME Conferences and InfoFairs
Exhibitor's Interview Guide — Final

Note: preliminary questions determined the number of events participated in, travel involved and whether exhibitors participated in last year's events.

1. I'd like to know your views of the event as a marketing/outreach vehicle for your organization and it's programs and services

   How does it compare to other events (appearances at non-government trade shows, advertising, collaborations with Chambers of Commerce, etc.)?

2. How satisfied were you personally with the logistics of the event (location, duration, physical set-up/space allocation, overall organization, etc.)?

   Is there anything you would change?

3. How useful do you feel the event was to your clients?

   What types of information were visitors looking for?

   Was this an appropriate forum to provide that information?

   Have you had any follow-up contacts as a result of the events?

4. How much additional work was required on your part to prepare and take part in the event?

   Do you feel the results obtained justify the effort/cost involved?

5. Do you have any additional comments you would like to make?