



Développement
économique Canada
pour les régions du Québec

Canada Economic
Development
for Quebec Regions

SURVEY ON THE AWARENESS AND REPUTATION OF CANADA ECONOMIC DEVELOPMENT FOR QUÉBEC REGIONS (CED)

Report

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Regions (CED)**

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Canada

Survey on the Awareness and Reputation of Canada Economic Development for Québec Regions (CED) - Report

This public opinion research report presents the results of an online survey conducted by Léger Marketing Inc. On behalf of Canada Economic Development for Québec Regions (CED). The quantitative research was conducted between March and April 2024.

Cette publication est également disponible en français sous le titre :

Étude sur la notoriété et la réputation de Développement économique Canada pour les régions du Québec (DEC) - Rapport

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1. Summary

Léger is pleased to present Canada Economic Development for Québec Regions (CED) with this report on the quantitative study of the awareness and reputation of the Agency among its target audiences. This report was prepared by Léger Marketing Inc. following the awarding of a contract by Canada Economic Development for Québec Regions (CED) (contract number CW2351310, awarded February 23, 2024). This contract has a value of \$23,560.60 (HST included).

1.1. Context

Canada Economic Development for Québec Regions (CED) plays a crucial role in promoting long-term economic development, with a particular focus on regions where economic growth is limited and opportunities for productive employment are lacking. With an established presence in every region of Québec, CED works closely with local players to support small and medium-sized enterprises (SMEs) and not-for-profit organizations (NPOs), offering them financial assistance for the realization of economic projects.

As part of its ongoing commitment to improve its communications strategies and manage its reputation, CED's Communications Branch (CB) is undertaking a public opinion survey (POR) to assess the awareness and reputation of the Agency among its target audiences. This initiative aims to better understand stakeholders' communication expectations and preferences, as well as to guide CED's future communication activities.

This research builds upon a similar study carried out in 2017, enabling us to identify trends and observe changing perceptions of the CED. In light of the rapid changes in Québec's entrepreneurial landscape, it is imperative to update data and identify new challenges and opportunities in terms of communication and regional economic development.

The results of this survey will be used to guide CED's communications strategy and enable effective communication of government priorities. The focus is on understanding emerging and underrepresented target audiences.

1.2. Methodology

This quantitative research utilized a telephone survey through computer-assisted telephone interviewing (CATI technology) to meet the study objectives and guarantee the reliability of the results. The preferred method was a survey of partners, economic development players, businesses, NPOs and charity organizations. The sampling frame was established using the lists provided by CED as a starting point, supplemented by the research firm to ensure a representative sample. For its samples, Léger works with ASDE (Survey Sampler: <https://surveysampler.com/>). Léger has worked with ASDE on surveys for a number of years due to the quality of their sample, which has been demonstrated on numerous occasions. For this study, flexible quotas were set to ensure a sufficient number of interviews with business executives from the different regions of Québec.

The data was collected between March 19 and April 12, 2024. A pretest of 10 interviews was conducted on March 19 in both official languages. Specifically, nine interviews were conducted in French and one in English. No changes were made to the questionnaire or programming following the pretest. Responses from the pretest interviews were included in the overall results. The national response rate for the survey was 19.93%. The median length of the interview was 25 minutes. Calls were recorded in order to assess the respondents' level of understanding of each question.

A total of 202 decision-makers from Québec companies were surveyed. The national margin of error for the survey is +/- 6.9%, 19 times out of 20. Based on data from Statistics Canada's 2021 national census, Léger weighted the results of this survey according to the number of employees and the industry sector of the companies.

Léger adheres to the strictest rules of the research industry when it comes to quantitative surveys. The questionnaire was also developed in accordance with the Standards for the Conduct of Government of Canada Public Opinion Research—Series B—Fieldwork and data tabulation for telephone surveys. Details of Léger's methodology, quality control mechanisms, questionnaires and weighting procedures are presented in the appendix.

1.3. Overview of quantitative conclusions

Awareness of Canada Economic Development for Québec Regions (CED)

- In terms of aided awareness, Canada Economic Development for Québec Regions (CED) is the least well known, with 44% of business executives surveyed claiming to know about it.
- Furthermore, 5% of respondents spontaneously named Canada Economic Development for Québec Regions (CED) as the organization responsible for promoting economic development in Québec. When it comes to unaided awareness, CED is far behind the top three, namely SADC/CAE (18%), the RCM (18%) and the Chamber of Commerce (13%).
- Word-of-mouth and user referrals (16%) were the main ways in which business executives learned about Canada Economic Development for Québec Regions (CED).

Opinion of Canada Economic Development for Québec Regions (CED)

- Just over a quarter of business executives surveyed (28%) have a positive opinion of Canada Economic Development for Québec Regions (CED). It is behind Investissement Québec (46%), SADC/CAE (42%) and the Business Development Bank of Canada (37%).
- The fact of having already done business with CED (31%), the assistance and support it provides to businesses and SMEs (29%) and the positive impact of its actions and involvement (26%) remain the three main reasons why business executives have a good opinion of CED.
- In addition to promoting economic development, business executives familiar with Canada Economic Development for Québec Regions (CED) consider assistance and support for businesses and SMEs (14%) and its contribution to economic dynamism (10%) to be the main objectives of the CED. Furthermore, 82% of them believe that CED is successful in meeting its mission objectives.
- Fostering business growth (76%) is the statement most associated with Canada Economic Development for Québec Regions (CED), followed by its extensive economic development expertise (63%) and its innovative, proactive organization (52%). Less than half of respondents familiar with CED believe that it responds and adapts quickly to the changing context of

Québec's regions (43%), that it offers fast and efficient service (38%) and that it communicates effectively about its programs and services (32%).

- According to respondents familiar with CED, it is more likely to encourage the participation of young people (47%), women (46%) and Indigenous peoples (43%), while it is less likely to encourage the participation of entrepreneurs identifying as 2SLGBTQI+ (22%). More or less a third of respondents feel that CED encourages the participation of other entrepreneurial groups.
- According to business executives familiar with CED, the organization's most important activities remain encouraging small and medium-sized enterprises to become more productive, innovating and marketing their products (97%), and supporting the economic development of Québec regions with low economic growth and insufficient job opportunities (93%). Apart from the activity of offering networking services to help SMEs identify business opportunities (65%), over three quarters of respondents consider the other activities to be important.
- To ensure economic development in the regions, 48% of respondents trust Canada Economic Development for Québec Regions (CED), which is at the bottom of the ranking.

Financing and support for businesses

- Financing (45%) is the most sought-after form of government assistance or development aid, particularly for NPOs (78%) and businesses operating in the accommodation, tourism or recreation sectors (64%).
- In fact, 11% of business executives surveyed said they had received support from Canada Economic Development for Québec Regions (CED), behind Investissement Québec (20%), SADC/CAE (19%) and the Business Development Bank of Canada (17%).
- When it comes to obtaining information to finance their business project, government departments, agencies and organizations, such as Canada Economic Development for Québec Regions (36%), remain by far the preferred source of information.

Government development aid services

- Of the executives surveyed, 77% of respondents prefer to access government economic development services through a combination of online, in-person and telephone access. In addition, almost all respondents (98%) feel it's important to obtain live service, either in person or by telephone.
- The government website (80%) is the preferred channel for respondents using government online development aid services. Although user-friendliness (66%) remains the most important criterion, all the other criteria remain important for a considerable number of respondents.
- Administrative complexity (51%) remains the main obstacle encountered by respondents when using online government services to support economic development.
- Only 18% of business executives familiar with Canada Economic Development for Québec Regions (CED) are aware of CED's referral service for financing programs and entrepreneurial resources.

CED website browsing and presence of businesses on social networks

- Just over a quarter of respondents (26%) have already visited the CED website. Of these, 69% found the information on the CED site useful.

- Facebook (73%) is the social media where businesses are most present.

1.4. Notes on interpretation of the research findings

The views and observations expressed in this document do not reflect those of Canada Economic Development for Québec Regions (CED). This report was compiled by Léger based on the research conducted specifically for this project.

1.5. Political neutrality certification

Research firm: Léger Marketing Inc. (“Léger”)

Contract number: CW2351310

Contract award date: February 23, 2024

Léger Marketing Inc. certifies that the final deliverables fully comply with the Government of Canada’s political neutrality requirements outlined in the *Policy on Communications and Federal Identity of the Government of Canada* and the *Directive on the Management of Communications*. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or performance ratings of a political party or its executives.



Signed:

Christian Bourque

Executive Vice-President, Léger

Date: April 6, 2024

2. Detailed results

Introduction

Canada Economic Development for Québec Regions (CED) conducted a survey of Québec business executives to assess awareness of the agency among its target audiences and its reputation. This study was carried out by means of online surveys, using computer-assisted telephone interviewing (CATI) technology. The fieldwork for this survey was carried out between March 19 and April 17, 2024. A total of 202 Québec business executives were surveyed.

Z-tests at 95% confidence were used to determine significant differences between subgroups.

Note 1: Totals may not add up to 100% due to rounding.

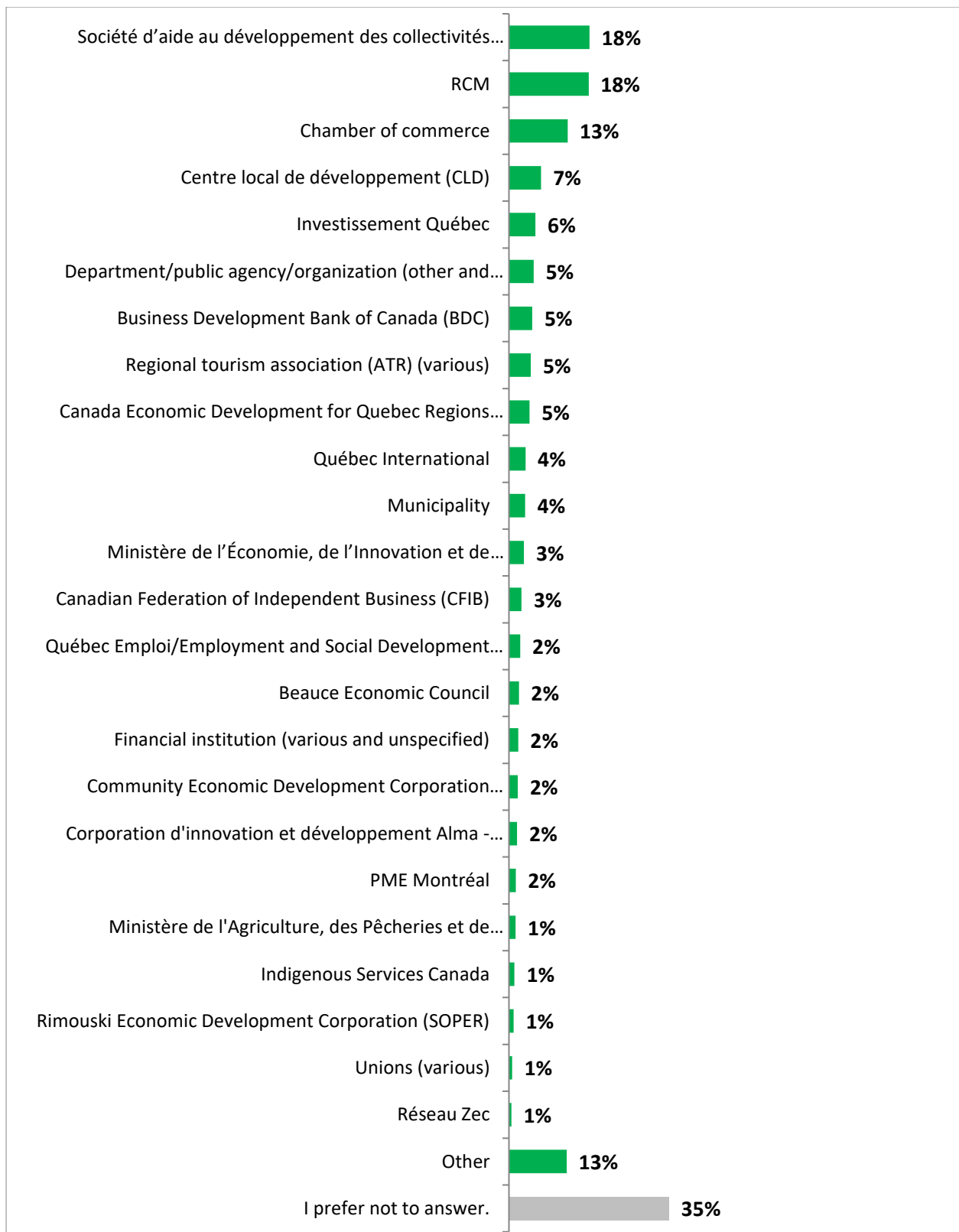
Note 2: In the graphs, items marked “Total” correspond to variables calculated from the original response modalities. For example, if the question asked respondents whether an item was “very important” or “somewhat important,” “Total ‘important’” would combine the value of both options (e.g., if 20% of respondents indicated “very important” and 15% indicated “somewhat important,” the “Total ‘important’ value would be 35%).

Awareness of Canada Economic Development for Québec Regions (CED)

Unaided awareness of organizations/institutions responsible for economic development in Québec

All respondents were asked to spontaneously name the organizations responsible for promoting long-term economic development in the Québec regions they know. As a result, 5% of respondents spontaneously mentioned Canada Economic Development for Québec Regions (CED). In terms of unaided awareness, CED remains far behind Sociétés d’aide au développement des collectivités (SADCs) (18%), Regional County Municipalities (RCMs) (18%) and the Chamber of Commerce (13%), which make up the top three. Other entities such as the Centres locaux de développement (CLDs) and Investissement Québec were cited by 7% and 6% of respondents respectively. Like CED, 5% of respondents also spontaneously mentioned departments or public agencies/organizations, the Business Development Bank of Canada (BDC) and regional tourism associations (ATR). Québec International and the Municipalities were identified by 4% of respondents. Several other institutions were mentioned with smaller percentages, ranging from 1% to 3%. In addition, 13% of respondents mentioned other organizations, and 35% of respondents refused to answer or could not name an organization.

Figure 1: Unaided awareness of organizations/institutions responsible for economic development in Québec



Q1. Can you name the organization or organizations you know of that are responsible for promoting the long-term economic development of Québec's regions?

Base: All respondents (n=202)

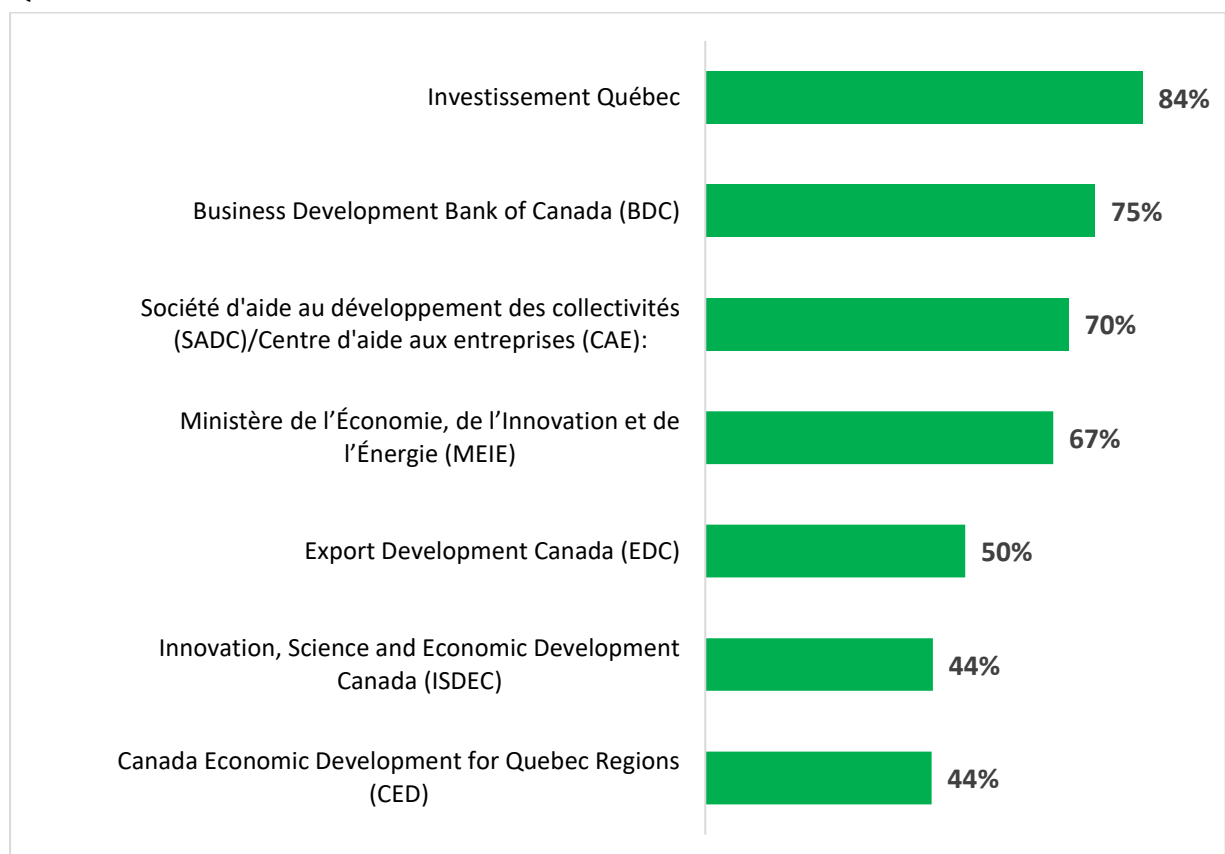
Executives of companies located in regions other than the Montréal and Quebec City CMAAs (9%), as well as executives of companies with sales over \$1 million (9%), are more likely to have spontaneously

named CED as the organization responsible for promoting the long-term economic development of Québec’s regions.

Aided awareness of organizations/institutions responsible for economic development in Québec

In terms of aided awareness, Investissement Québec (84%), the Business Development Bank of Canada (75%) and the Société d’aide au développement des collectivités (SADC) / Centre d’aide aux entreprises (CAE) are the three best-known organizations responsible for economic development in Quebec, followed by the ministère de l’Économie, de l’Innovation et de l’Énergie (67%) and Export Development Canada (50%). Canada Economic Development for Québec Regions (CED) (44%) is the organization with the lowest awareness on the list, tied with Innovation, Science and Development Canada (44%).

Figure 2: Aided awareness of organizations/institutions responsible for economic development in Québec*



Q2a. Overall, would you say you have a very positive, somewhat positive, neither positive nor negative, somewhat negative or very negative opinion of the following organizations or institutions?
Base: All respondents (n=202)

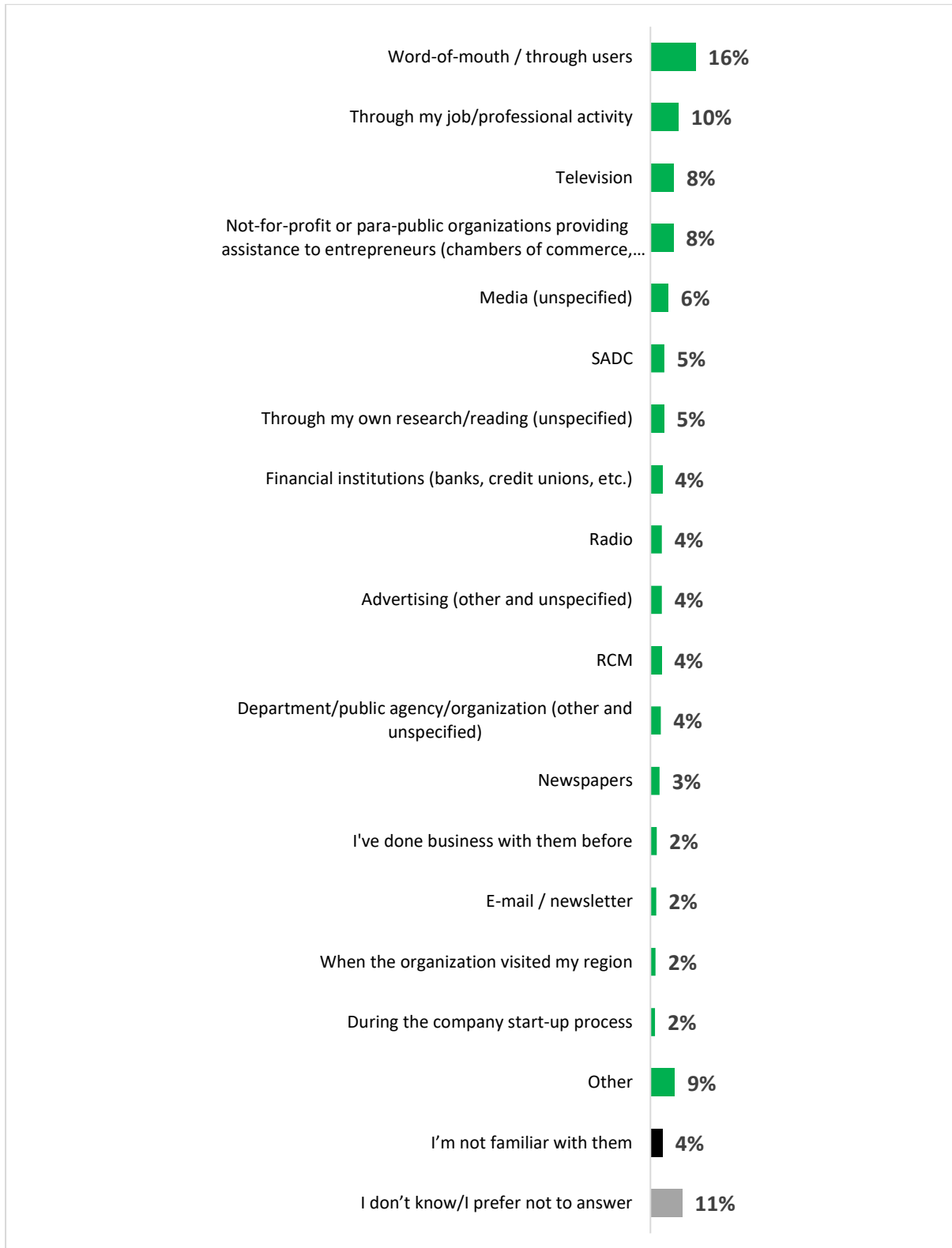
**Aided awareness corresponds to respondents who have a positive, neutral or negative opinion of organizations/institutions in charge of economic development, in addition to those who know these organizations, but not enough to have an opinion.*

Executives of companies with sales in excess of \$1 million (58%), those located in resource regions (58%) and executives of companies with six or more employees (55%) are the most likely to be familiar with Canada Economic Development for Québec Regions (CED).

Source of information about Canada Economic Development for Québec Regions (CED)

Respondents who are familiar with Canada Economic Development for Québec Regions (CED) were asked how they learned of its existence. Word-of-mouth and referrals from users (16%) are the most common ways respondents became aware of Canada Economic Development for Québec Regions (CED), followed by learning about the agency through their job or professional activity (10%). Television and non-profit or para-public organizations that help entrepreneurs (Chambers of Commerce, Centre local de développement (CLDs), etc.), each at 8%, are also frequent sources of information about CED. Less common means include the media in general (6%), the Société d'aide au développement des collectivités (SADC) and personal research or reading (5%), as well as financial institutions, radio, advertising, Regional County Municipalities and government departments or agencies (4% each). Rarer sources mentioned by respondents include newspapers (3%), having done business with them before, e-mails and newsletters, during a visit to their region and during the business start-up process (2% each). However, 11% of respondents were unsure or preferred not to answer the question.

Figure 6: Source of information about Canada Economic Development for Québec Regions (CED)



Q3. How did you hear about Canada Economic Development for Québec Regions (CED)?

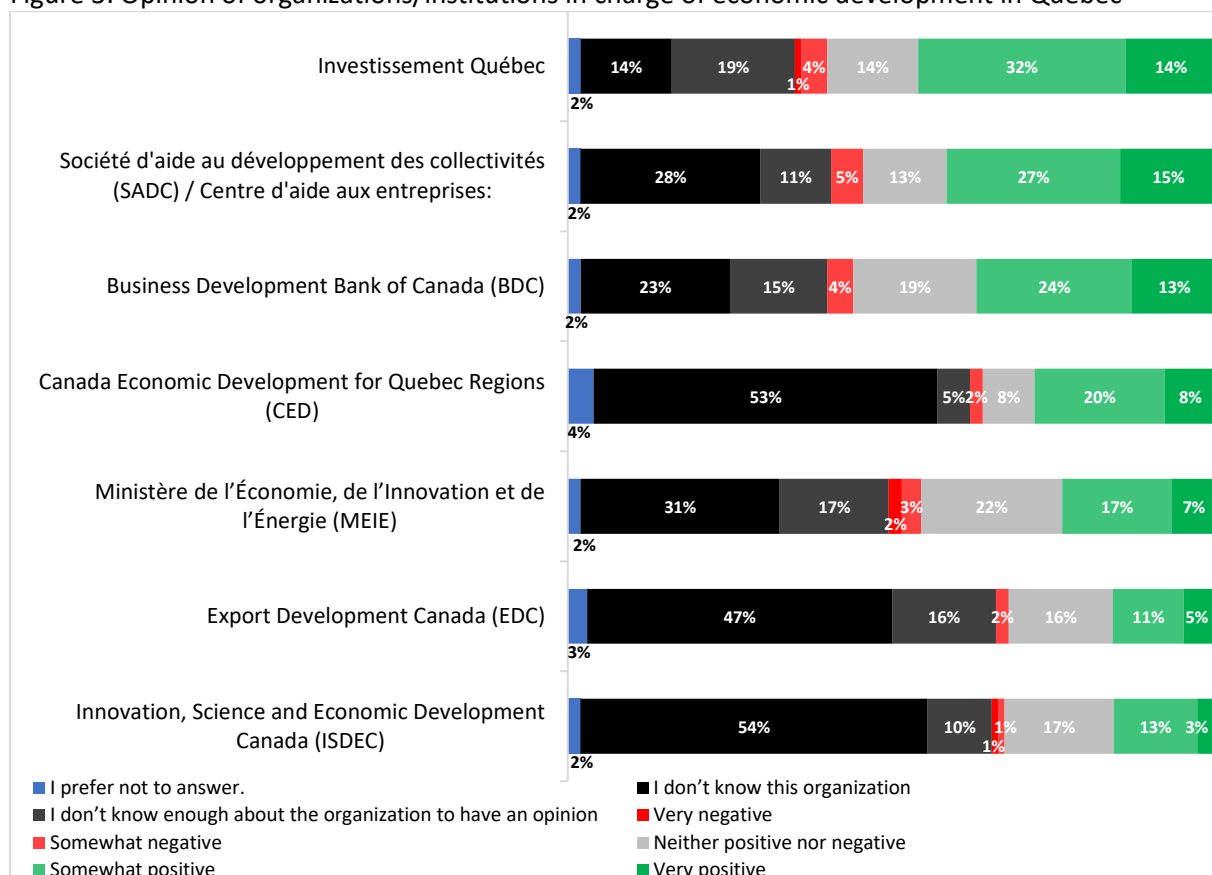
Base: Respondents aware of Canada Economic Development for Québec Regions (CED) (n=84)

Opinion of Canada Economic Development for Québec Regions (CED)

Opinion of organizations/institutions in charge of economic development in Québec

We asked all respondents whether they had a positive, negative or neutral opinion of the organizations or institutions responsible for economic development. Nearly three out of ten respondents have a positive opinion of Canada Economic Development for Québec Regions (CED) (28%, including 8% with a very positive opinion and 20% with a somewhat positive opinion). In terms of positive opinion, CED is ahead of Investissement Québec (46%, including 14% with a very positive opinion and 32% with a fairly positive opinion), the Société d'aide au développement des collectivités (SADC) / Centre d'aide aux entreprises (42%, including 15% with a very positive opinion and 27% with a fairly positive opinion) and the Business Development Bank of Canada (37%, including 13% with a very positive opinion and 24% with a fairly positive opinion). Nearly a quarter of respondents also have a positive opinion of the ministère de l'Économie, de l'Innovation et de l'Énergie (MEIE) (24%, including 7% with a very positive opinion and 17% with a somewhat positive opinion). Finally, 16% of respondents feel they have a positive opinion of Export Development Canada (very positive: 5%; somewhat positive: 11%) and Innovation, Science and Economic Development Canada (ISDEC) (very positive: 3%; somewhat positive: 13%).

Figure 3: Opinion of organizations/institutions in charge of economic development in Québec



Q2a. Overall, would you say you have a very positive, somewhat positive, neither positive nor negative, somewhat negative or very negative opinion of the following organizations or institutions?
Base: All respondents (n=202)

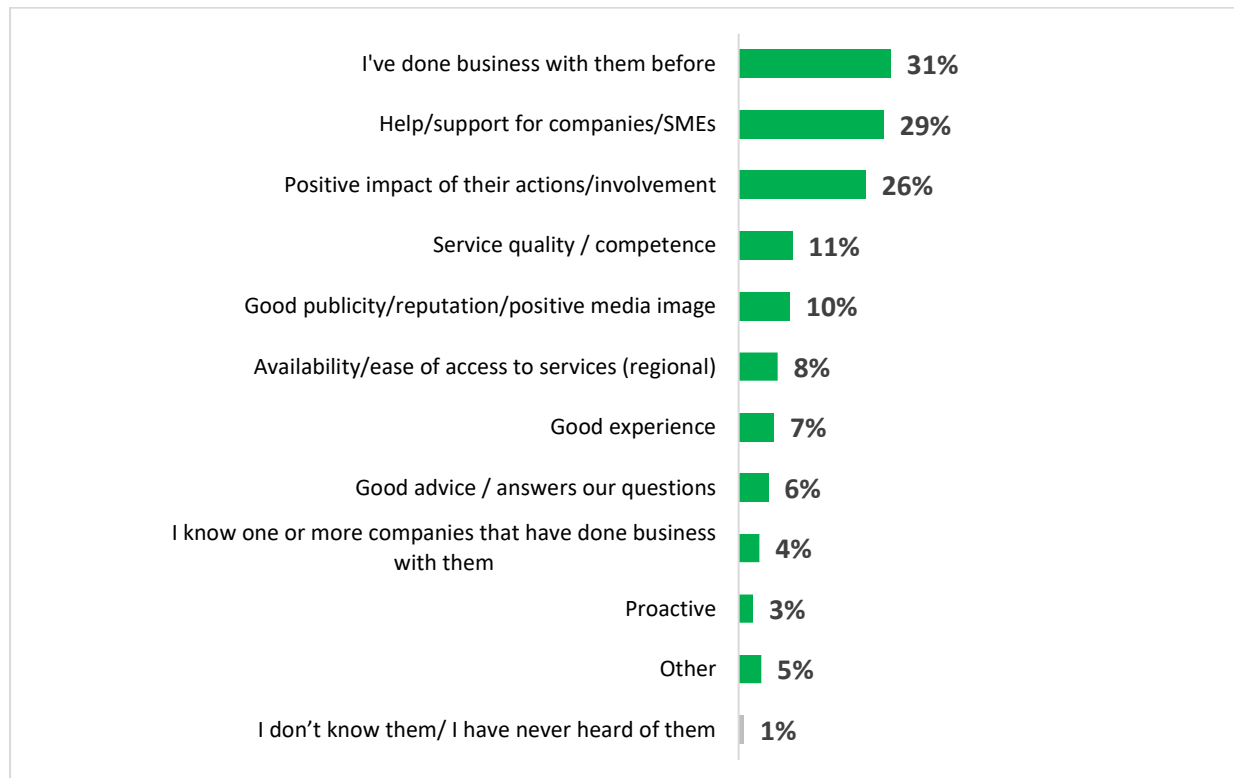
Business executives who know Canada Economic Development for Québec Regions (64%), executives of companies that have confidence in Canada Economic Development for Québec Regions (55%),

executives of companies located in regions other than the Montréal and Quebec City CMAs (39%), executives of companies with sales over \$1 million (38%), executives of companies that have already received funding from Canada Economic Development for Québec Regions (36%) and executives of companies with six or more employees (36%) are more likely to have a positive opinion of Canada Economic Development.

Reasons behind positive opinions of Canada Economic Development for Québec Regions (CED)

Already having done business with CED (31%), the feeling of helping or supporting businesses and SMEs (29%), and the positive impact of their actions and involvement (26%) are the three main reasons why respondents have a positive opinion of Canada Economic Development for Québec Regions (CED). In addition, 11% of respondents appreciated CED’s quality of service and competence, while 10% valued the organization’s good publicity and reputation. Availability and ease of access to services (8%) and good personal experiences (7%) are also mentioned. Smaller percentages of respondents emphasize good advice and responsiveness to questions (6%), knowing companies that have done business with CED (4%), and the organization’s proactivity (3%). Finally, only 1% of respondents say they do not know or have never heard of CED, and 5% cite other unspecified reasons for their positive opinion.

Figure 4: Reasons behind positive opinions of Canada Economic Development for Québec Regions (CED)



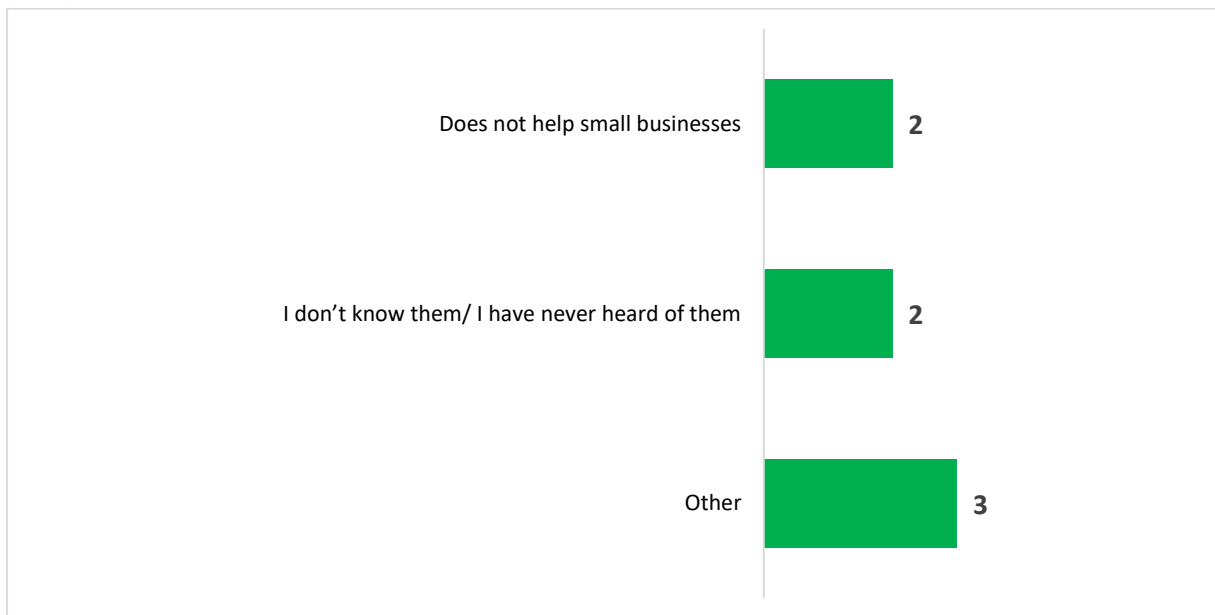
Q2b. In a few words, why do you have a positive opinion of Canada Economic Development for Québec Regions (CED)?

Base: Respondents who have a positive opinion of Canada Economic Development for Québec Regions (n=50)

Reasons behind negative opinions of Canada Economic Development for Québec Regions (CED)

The graph below shows the reasons behind some respondents' negative opinion of Canada Economic Development for Québec Regions (CED). Among the reasons listed, not helping small businesses was mentioned by two respondents. Similarly, two respondents said they were not familiar with CED or had never heard of it. Finally, three other respondents cite a variety of unspecified reasons for their negative opinion.

Figure 5: Reasons behind negative opinions of Canada Economic Development for Québec Regions (CED)



Q2b. In a few words, why do you have a negative opinion of Canada Economic Development for Québec Regions (CED)?

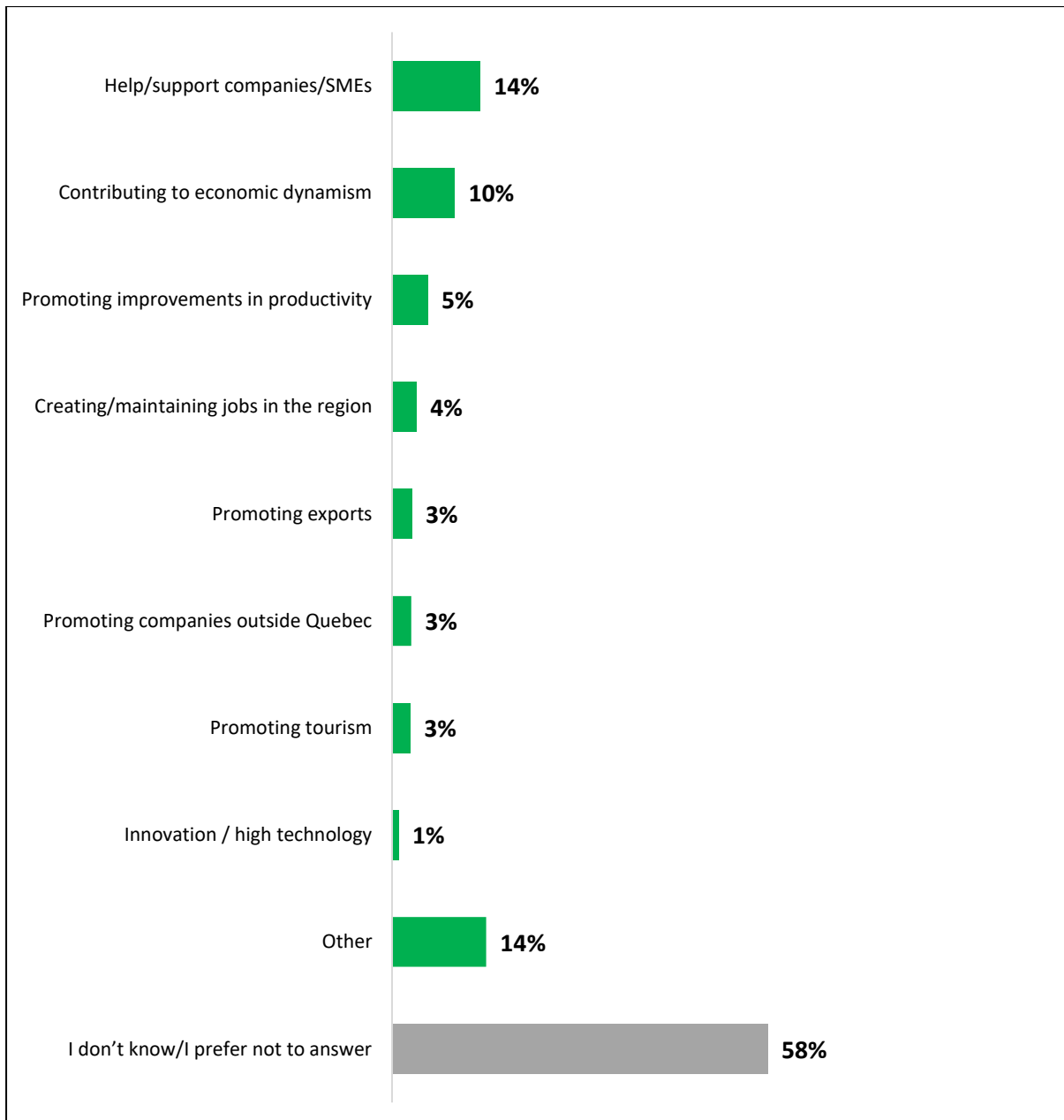
Base: Respondents who have a negative opinion of Canada Economic Development for Québec Regions (n=7)*

*Given the small number of respondents (n < 30), results are presented for information purposes only.

Main objectives of Canada Economic Development for Québec Regions (CED)

Respondents familiar with Canada Economic Development for Québec Regions (CED) were asked what they consider to be the main objectives of Canada Economic Development for Québec Regions, apart from promoting economic development. Helping and supporting businesses and SMEs (14%) and contributing to economic dynamism (10%) were the most cited objectives, followed by promoting productivity improvement (5%), and creating and maintaining jobs in the region (4%). Smaller percentages of respondents identified export promotion, business promotion outside Québec, and tourism promotion (3% each) as key CED objectives. In addition, innovation and high technology are mentioned by 1% of respondents. A further 14% cited other unspecified objectives, while 58% of respondents either didn't know or refused to answer.

Figure 8: Main objectives of Canada Economic Development for Québec Regions (CED)



Q5. As far as you know, in addition to promoting the economic development of Québec's regions, what are the main objectives of Canada Economic Development for Québec Regions (CED)?

Base: Respondents aware of Canada Economic Development for Québec Regions (CED) (n=84)

Evaluation of the alignment between the objectives and achievements of Canada Economic Development for Québec Regions (CED)

The following definition of Canada Economic Development for Québec Regions' (CED) mission was presented to respondents familiar with CED:

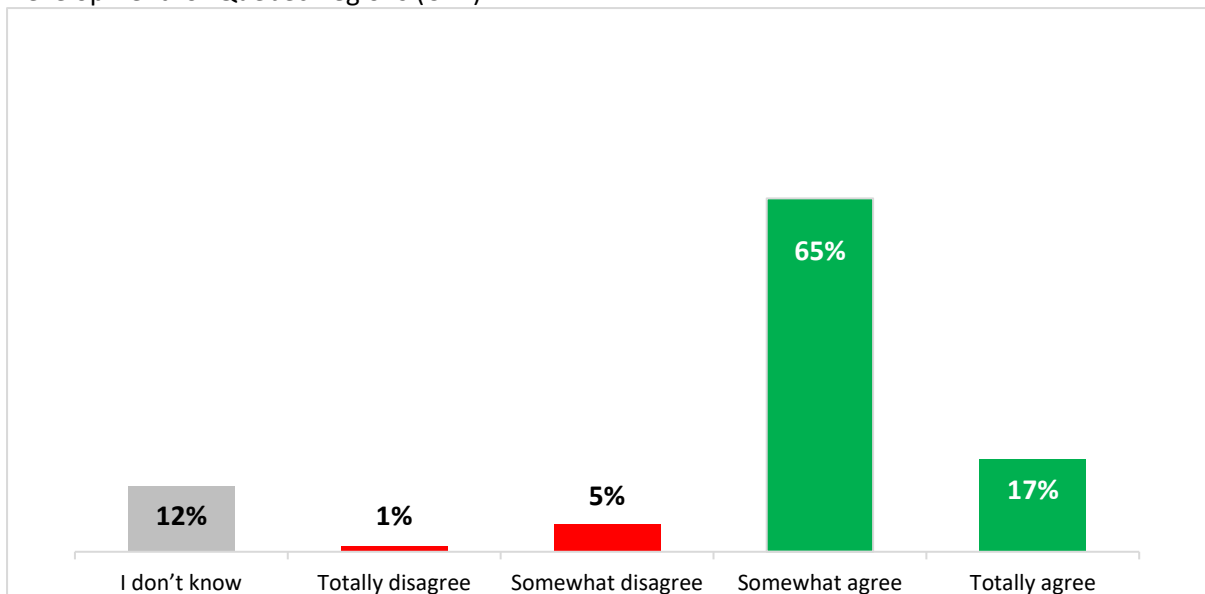
Canada Economic Development for Québec Regions (CED)'s mission is to promote the long-term economic development of the regions of Québec by giving special attention to those where slow economic growth is prevalent.

CED helps businesses get off the ground and perform. It helps them become more innovative, productive and competitive. It supports efforts to mobilize the community in the various regions of Québec and attract investment aimed at boosting the prosperity of the Québec economy.

CED strives to contribute to the economic vitality of all Québec regions by capitalizing on their regional competitive advantages. It supports transition and diversification in communities that remain dependent on a limited number of sectors or have suffered an economic shock.

They were then asked if they agreed with the following statement: “CED is successful in meeting the objectives of its mission.” Of these, 7% of respondents disagreed with CED’s effectiveness in achieving its objectives (totally disagree: ... somewhat disagree 5%), while eight out of ten respondents (82%) tend to somewhat agree or totally agree with the achievement of objectives (somewhat agree: 65%; totally agree; 17%) of CED. More than one in ten (12%) said they’re not sure.

Figure 9: Evaluation of the alignment between the objectives and achievements of Canada Economic Development for Québec Regions (CED)



Q6. Based on this definition, to what extent do you agree with the following statement? “CED is successful in meeting the objectives of its mission.”

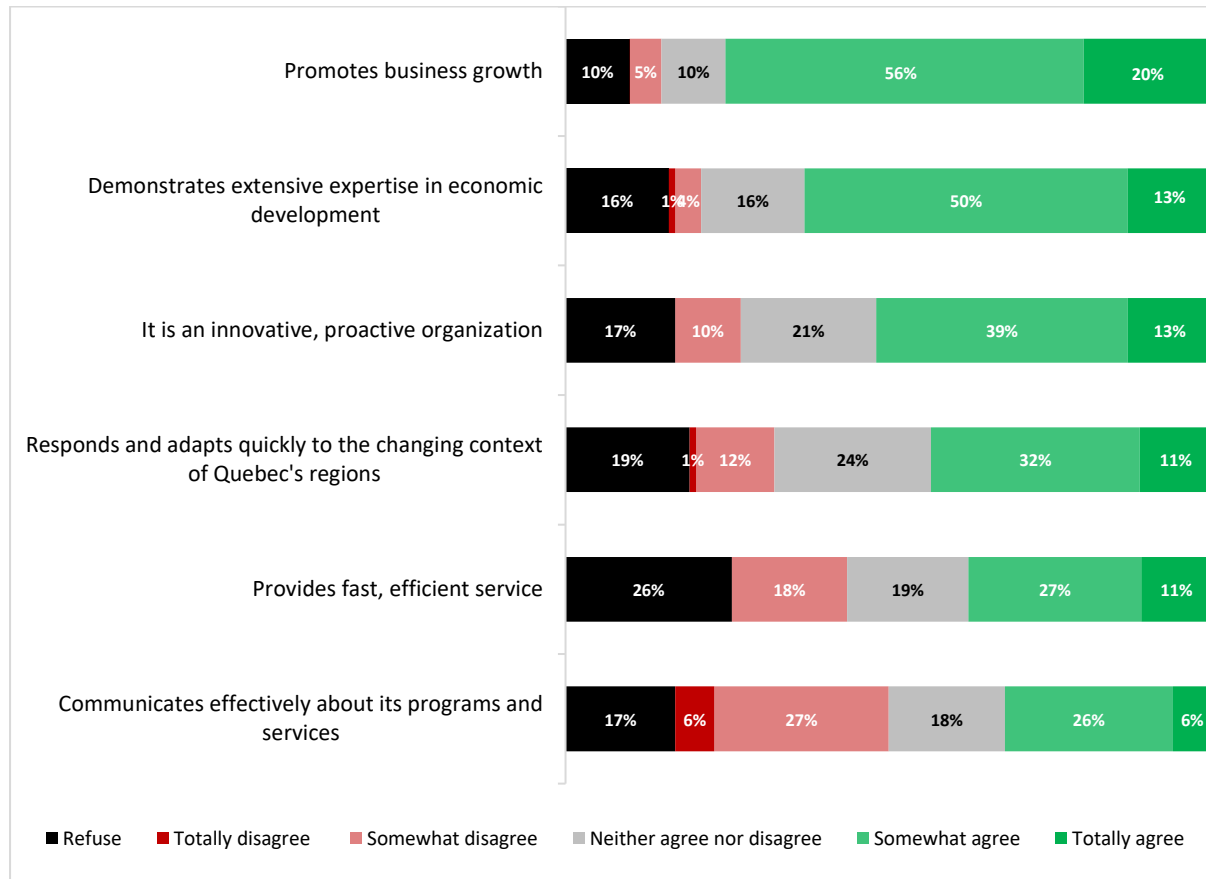
Base: Respondents aware of Canada Economic Development for Québec Regions (CED) (n=84)

Opinion of statements concerning Canada Economic Development for Québec Regions (CED)

Respondents aware of Canada Economic Development for Québec Regions (CED) were asked to rate their level of agreement with statements about the organization. The majority of respondents have a positive view of Canada Economic Development for Québec Regions (CED), with particularly favourable opinions regarding its role in business growth, where 76% agree (somewhat agree: 56%; totally agree: 20%). When it comes to economic development expertise, innovation and proactivity, respectively 63% and 52% of respondents agree with these aspects (somewhat agree: 50% and 39%; totally agree: 13% and 13%). When it comes to CED’s ability to respond and adapt quickly to changing regional contexts, 43% express their agreement (somewhat agree: 32%; totally agree: 11%). Nearly four out of ten respondents (38%) agree that CED offers fast, efficient service (somewhat agree: 27%;

totally agree: 11%). Finally, nearly a third of respondents (32%) feel that CED communicates effectively about its programs and services (somewhat agree: 26%; totally agree: 6%).

Figure 10: Opinion of statements concerning Canada Economic Development for Québec Regions (CED)



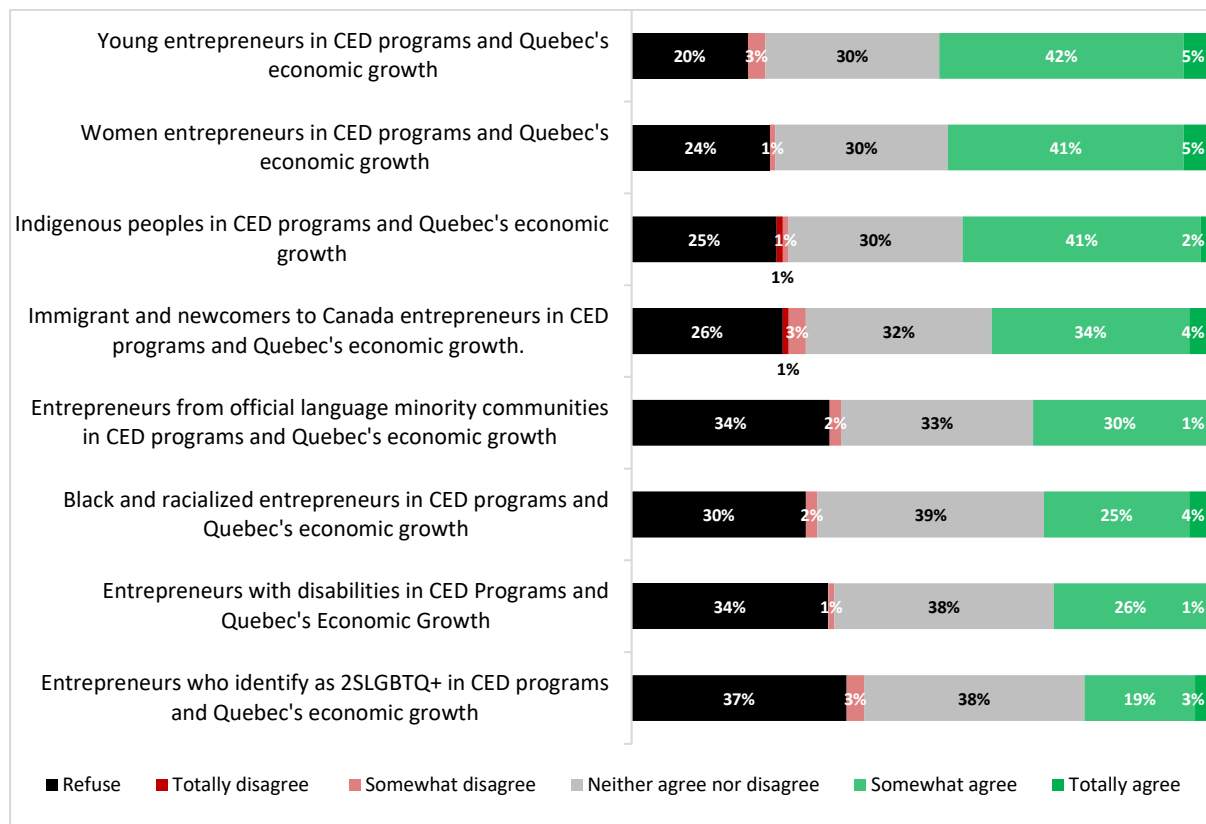
Q7a. Please tell me whether you totally agree, somewhat agree, neither agree nor disagree, somewhat disagree or totally disagree with the following statements about Canada Economic Development for Québec Regions (CED).

Base: Respondents aware of Canada Economic Development for Québec Regions (CED) (n=84)

Opinion on the impact of Canada Economic Development for Québec Regions (CED) on the participation of certain groups of entrepreneurs

Respondents familiar with CED were then asked to indicate their level of agreement with other statements about Canada Economic Development for Québec Regions. A large percentage of respondents feel that CED effectively promotes the participation of young entrepreneurs (47%) (totally agree: 5%; somewhat agree: 42%), women entrepreneurs (46%) (totally agree: 5%; somewhat agree: 41%), as well as Indigenous peoples (43%) (totally agree: 2%; somewhat agree: 41%) and immigrant or newcomers to Canada entrepreneurs (38%) (totally agree: 4%; somewhat agree: 34%). Canada Economic Development for Québec Regions (CED) also encourages the participation of entrepreneurs from official language minority communities (31%) (totally agree: 1%; somewhat agree: 30%), from Black and racialized communities (29%) (totally agree: 4%; somewhat agree: 25%), and those with disabilities (28%) (totally agree: 1%; somewhat agree: 26%). Finally, 22% of respondents feel that CED effectively supports entrepreneurs who identify as 2SLGBTQ+ (totally agree: 3%; somewhat agree: 19%).

Figure 11: Opinion on statements concerning Canada Economic Development for Québec Regions (CED) and its impact on the participation of certain groups of entrepreneurs



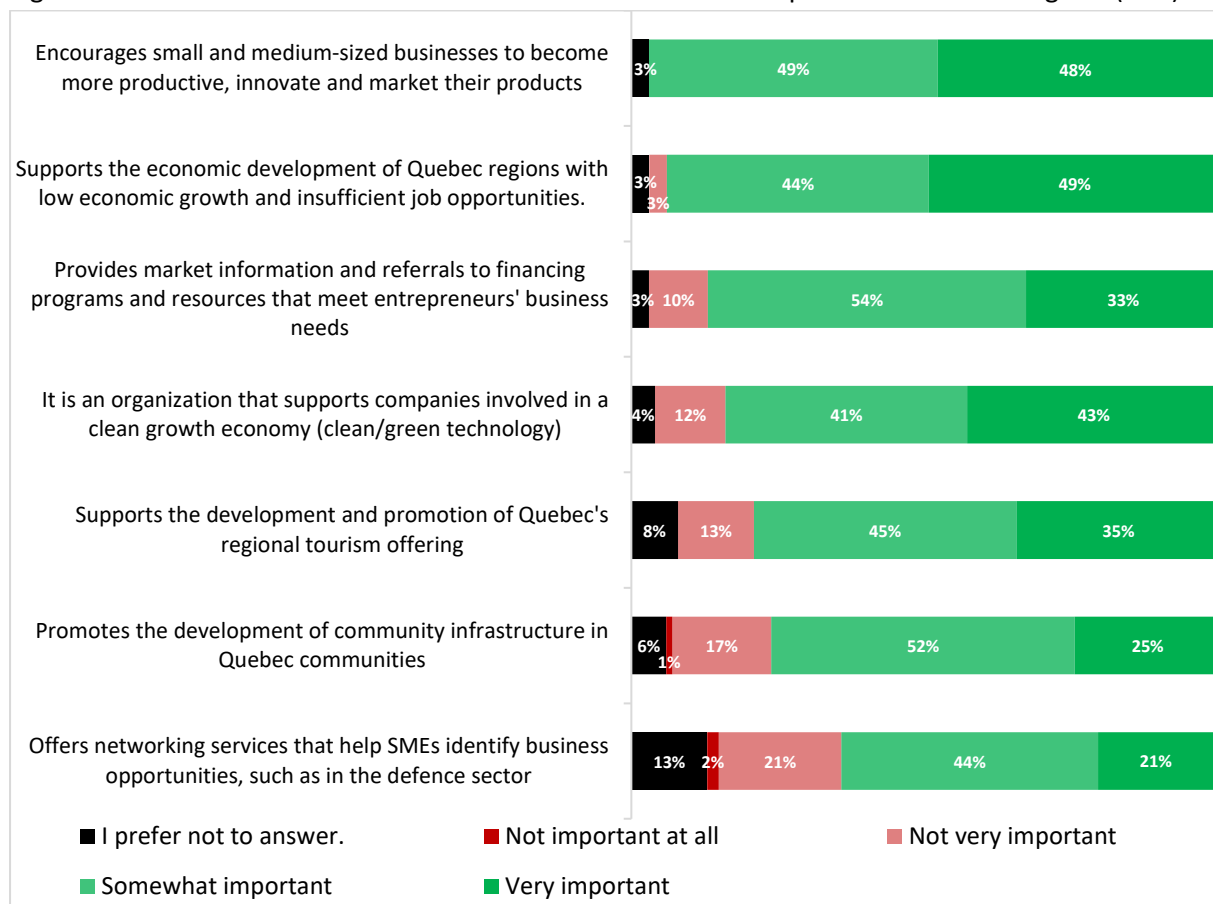
Q7b. Now, please tell me whether you totally agree, somewhat agree, neither agree nor disagree, somewhat disagree or totally disagree with the following statements about Canada Economic Development for Québec Regions (CED).

Base: Respondents aware of Canada Economic Development for Québec Regions (CED) (n=84)

Evaluation of the activities of Canada Economic Development for Québec Regions (CED)

Respondents familiar with Canada Economic Development for Québec Regions (CED) were also asked about the level of importance of the organization's activities. The majority of respondents strongly value the activities of Canada Economic Development for Québec Regions (CED), particularly with regard to their role in increasing the productivity and innovation of small and medium-sized enterprises, with 97% rating this aspect as important (48% very important; 49% somewhat important). Similarly, 93% recognize the importance of CED's support for regional economic development, for regions with slow economic growth and insufficient job opportunities (49% very important; 44% somewhat important). When it comes to market information and referral services, 88% find them beneficial (33% very important; 54% somewhat important). Support for the green economy is also well perceived, with 84% considering CED's encouragement of companies involved in a clean growth economy (clean/green technology) to be important (43% very important; 41% somewhat important). In addition, 79% consider CED's tourism promotion activities to be important (35% very important; 45% somewhat important) and 77% see the development of community infrastructures as essential (25% very important; 52% somewhat important). Finally, networking services to help SMEs find business opportunities are considered important by 65% of respondents (21% very important; 44% somewhat important).

Figure 12: Evaluation of the activities of Canada Economic Development for Québec Regions (CED)



Q8. Please indicate how important you consider each of the following activities carried out by Canada Economic Development for Québec Regions (CED): very important, somewhat important, not very important, or not important at all.

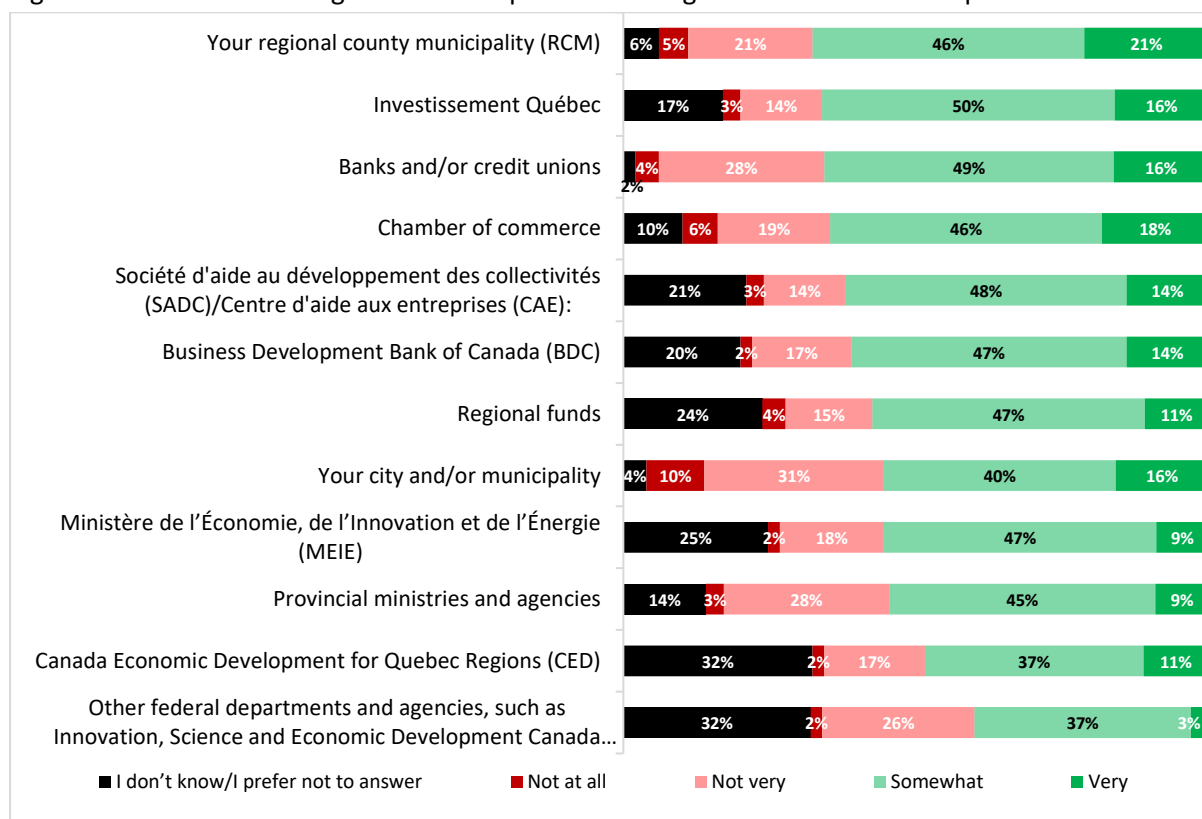
Base: Respondents aware of Canada Economic Development for Québec Regions (CED) (n=84)

Confidence in organizations responsible for regional economic development

All respondents were asked about their level of confidence in the organizations responsible for economic development in their region. A total of 48% of respondents are confident in Canada Economic Development for Québec Regions (CED) (very: 11%; somewhat: 37%). However, CED is the organization that inspires the least confidence. In terms of confidence in regional economic development, Regional County Municipalities (RCMs) come out on top (68%, with 21% very confident and 46% somewhat confident). Investissement Québec (66%, with 16% very confident and 50% somewhat confident), and banks and credit unions (66%, with 16% very confident and 49% somewhat confident) follow close behind. The Chamber of Commerce, the Société d'aide au développement des collectivités (SADC) / Centre d'aide aux entreprises (CAE) and the Business Development Bank of Canada (BDC) each attract confidence levels of 65%, 62% and 61% respectively (Chamber of Commerce: 18% very, 46% somewhat; SADC/CAE: 14% very, 48% somewhat; BD: 14% very, 47% somewhat). Other initiatives such as regional funds (58%), the city or municipality (56%), the ministère de l'Économie, de l'Innovation et de l'Énergie (MEIE) (55%), provincial agencies and departments (54%) also enjoy confidence levels from more than half of respondents, indicating widespread support

for these entities in their economic development role. Finally, 41% of respondents are confident in other federal agencies and departments (3% very, 37% somewhat).

Figure 13: Confidence in organizations responsible for regional economic development



Q9. Could you please tell me to what extent you have confidence in the following organizations to ensure economic development in your region? (A lot, enough, a little, not at all.)

Base: All respondents (n=202)

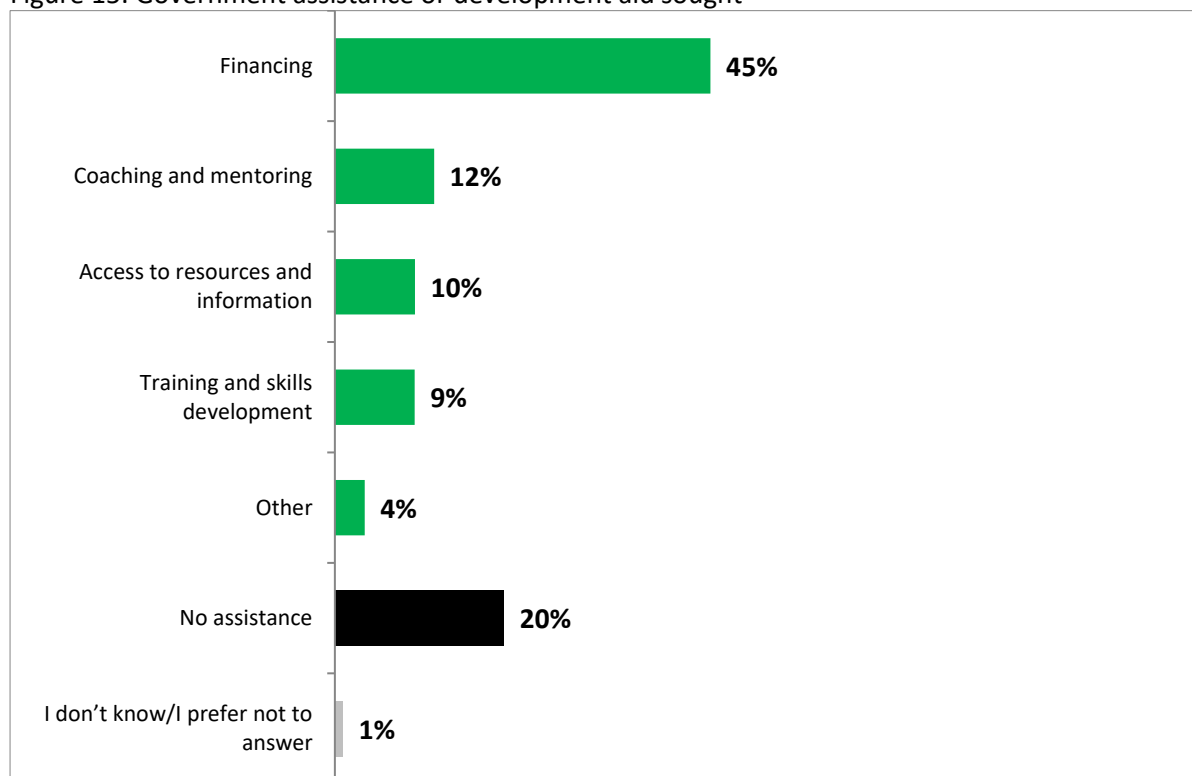
Business executives who have a positive opinion of CED (94%), who are familiar with CED (82%) or who are from companies located in resource regions (63%) are proportionally more likely to have confidence in Canada Economic Development for Québec Regions (CED).

Financing and support for businesses

Government assistance or development aid sought

All respondents were asked what type of government assistance or economic development aid they were primarily looking for. Financing (45%) is the development assistance or aid most favoured by the business executives surveyed, followed by coaching and mentoring (12%), access to resources and information (10%) and training and skills development (9%). A further 4% of respondents mentioned looking for other types of government assistance or development aid. Otherwise, 20% of business executives surveyed said they didn't need any help, while 1% said they didn't know or preferred not to answer.

Figure 15: Government assistance or development aid sought



Q11. What type of government assistance or economic development aid are you primarily looking for?

Base: All respondents (n=202)

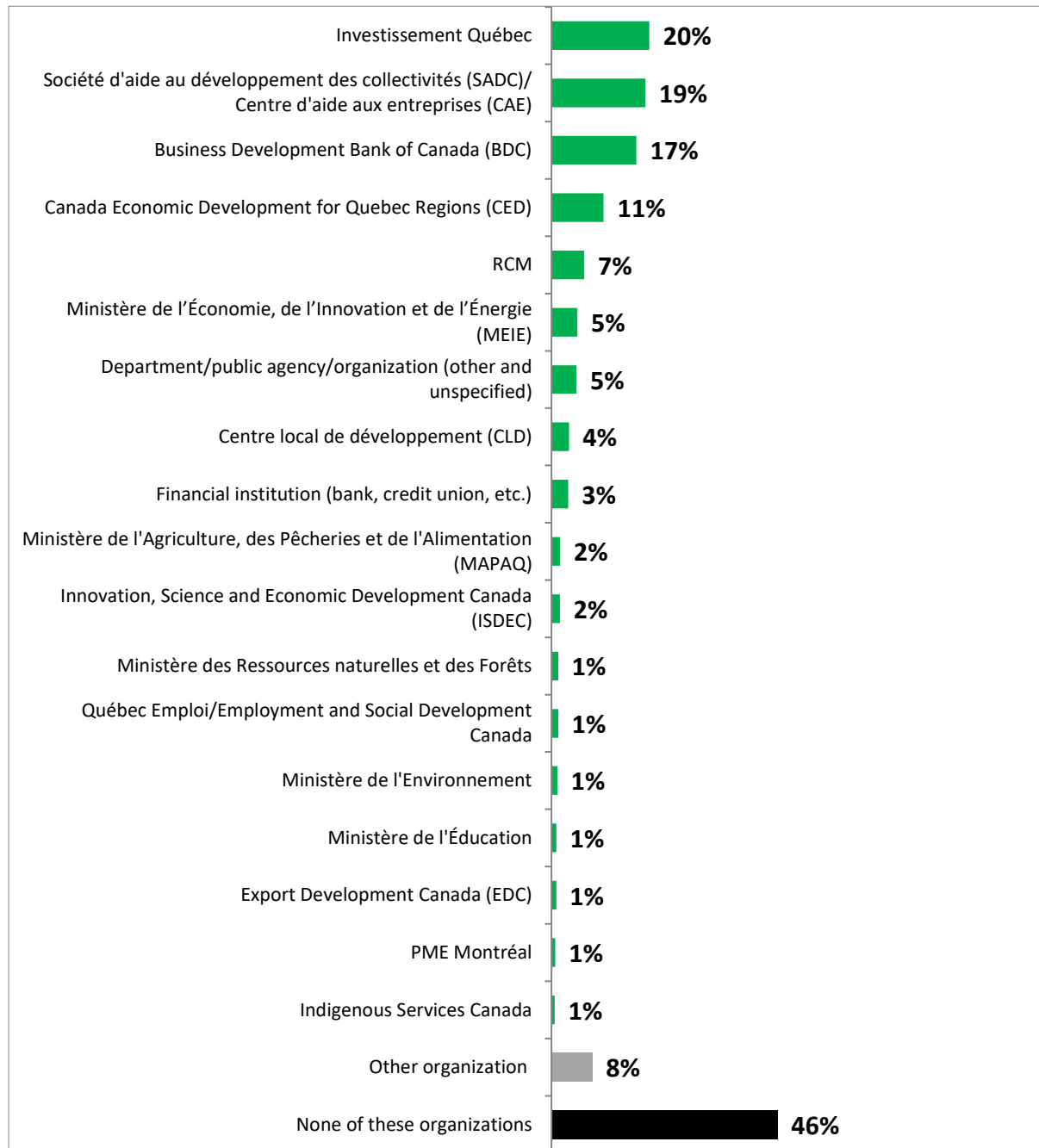
A higher percentage of NPO executives (78%), executives of businesses in the accommodation, tourism or recreation sector (64%), executives of businesses that have already received CED funding

(56%) and executives of businesses that are familiar with CED (54%) indicated that they are primarily looking for financing. While executives of companies with sales under \$1 million (17%) are more likely to seek coaching and mentoring, SMEs are more likely to want access to more resources and information (12%). Executives of companies that have never received CED funding (34%), retail trade executives (33%) and SME executives (25%) are more likely to say they don't need any help.

Financing and support for economic development projects

All Québec business executives surveyed were asked if they had ever received financing and support from an institution or organization for an economic development project. Of these, 11% of business executives in Québec received support from Canada Economic Development for Québec Regions (CED), which is still behind Investissement Québec (20%), the Société d'aide au développement des collectivités (SADC) / Centre d'aide aux entreprises (19%) and the Business Development Bank of Canada (BDC) (17%). Regional County Municipalities (RCMs) helped 7% of respondents, while even smaller proportions were supported by various departments, agencies, public organizations, and financial institutions, each one with 5% or less. A further 8% of respondents mentioned support from other, unspecified organizations. Almost half of respondents (46%) have received no funding or support from these organizations.

Figure 7: Financing and support for economic development projects*



Q4. Have you ever obtained financing or support from any of the following organizations for an economic development project?

Base: All respondents (n=202)

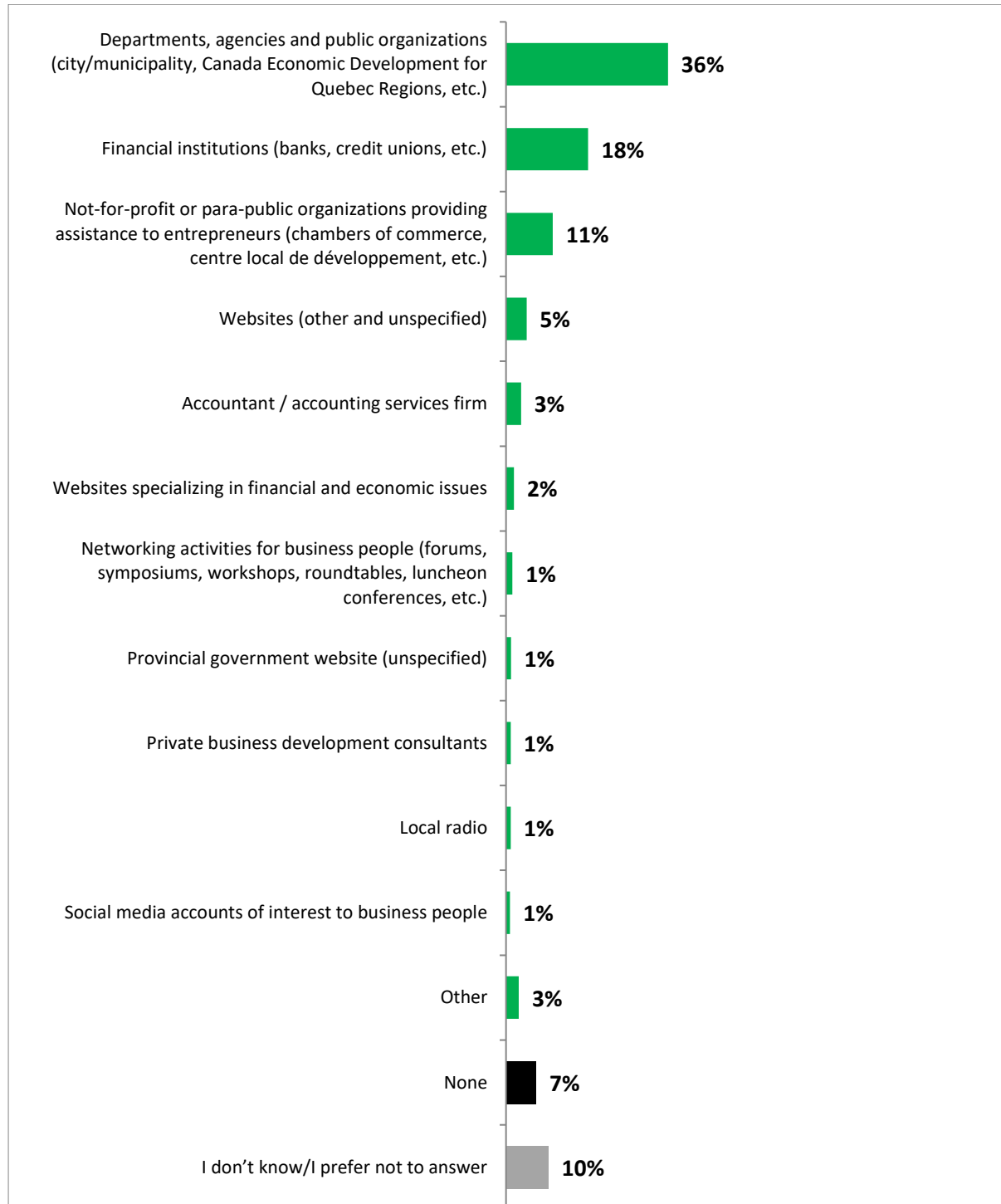
*Since respondents have the possibility to give up to four answers, the total may exceed 100%.

Executives in regions other than the Montréal and Quebec City CMAs (18%), executives in companies with more confidence in CED (18%) and executives in companies with 6 or more employees (16%) were proportionally more likely to mention that their companies were financed by CED.

Preferred source of information for financing business projects

All respondents were asked which information source they would consult first if they wanted to obtain information to finance their business projects. Departments, agencies and public organizations (36%) remain the preferred source of information for financing business projects, followed by financial institutions (18%) and non-profit or para-public organizations that help entrepreneurs (11%). Smaller percentages of business executives mentioned websites (5%), accountants/accounting service firms (3%), websites specializing in financial and economic issues (2%), networking events for businesspeople (1%), the provincial government website (1%), private business development consultants (1%), local radio (1%) and social media accounts of interest to businesspeople (1%). A further 3% mentioned other sources of information. On the other hand, 7% of respondents indicated that they would not consult any source of information, while 10% said they didn't know or preferred not to answer.

Figure 14: Preferred source of information for financing business projects



Q10. If you were looking for information to help you finance your business projects, which information source would you consult first?

Base: All respondents (n=202)

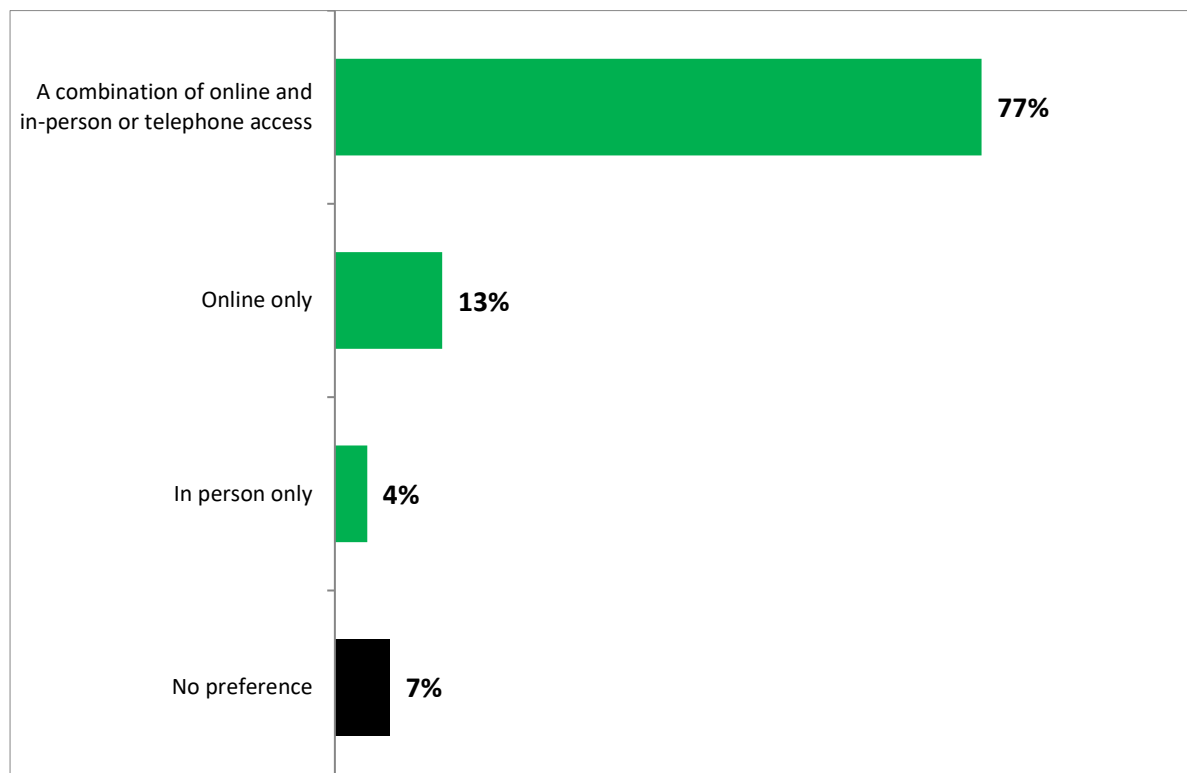
Executives of companies with sales of over \$1 million and CED-funded companies (48%) are more likely to mention government departments, agencies and public organizations, while SMEs (23%) are more likely to say they would turn to financial institutions.

Government development aid services

Preferences for accessing government economic development aid services

All respondents were asked how they prefer to access government economic development aid services. Over three quarters of business executives (77%) prefer to access government economic development services through a combination of online, in-person or telephone access. Otherwise, 13% prefer to access these services online only, while 4% prefer to access them in person only. On the other hand, 7% said they had no preference.

Figure 16: Preferences for accessing government economic development aid services



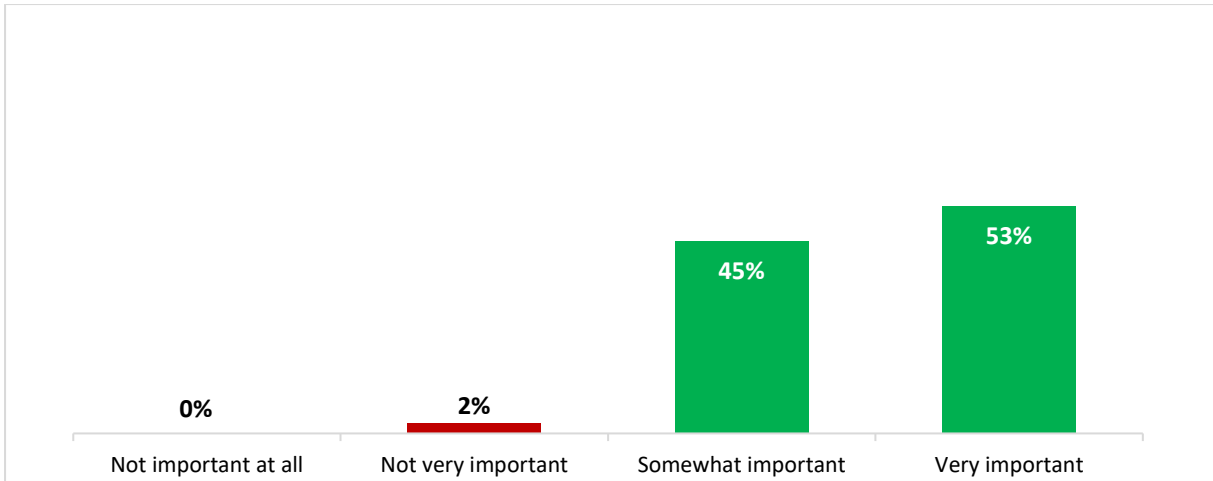
Q12a. How do you prefer to access government economic development aid services?

Base: All respondents (n=202)

Importance of real-time service to companies

All respondents were asked how important it is for them to obtain live service, whether in person or by telephone. Almost all respondents consider it important to have real-time services for companies (very important: 53%; somewhat important: 45%). On the other hand, 2% of respondents feel that obtaining this service is of little importance.

Figure 17: Importance of real-time services to companies



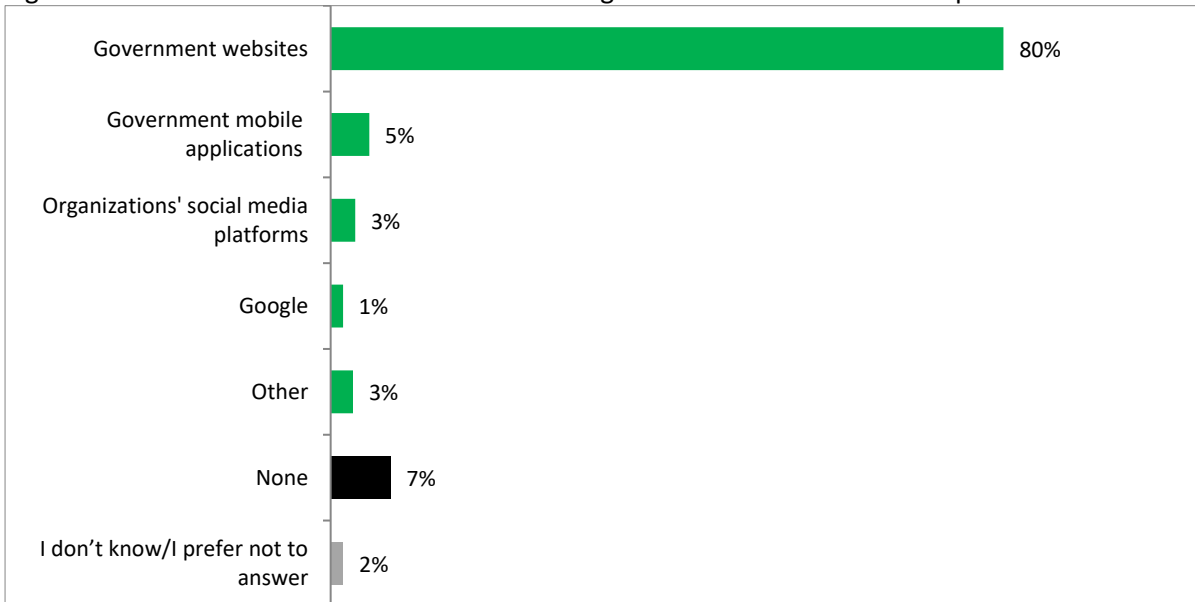
Q12b. How important is it for you to get real-time service, either in person or by phone?

Base: All respondents (n=202)

Preferred channels for online access to government economic development aid services

Respondents who use government economic development aid services online were asked about their preferred online channel. The government website (80%) remains by far the preferred channel for online access to government services supporting economic development. Small percentages of respondents prefer government mobile apps (5%), the social media platforms of organizations (3%) or Google (1%). Otherwise, 3% prefer to use other channels to access online economic development services, 7% of respondents said they don't use any of them, and 2% said they weren't sure or preferred not to answer.

Figure 18: Preferred channels for online access to government economic development aid services



Q13. When you're online, which channel do you prefer to use to access government economic development aid services?

Base: Respondents who use government online economic development aid services (n=190)

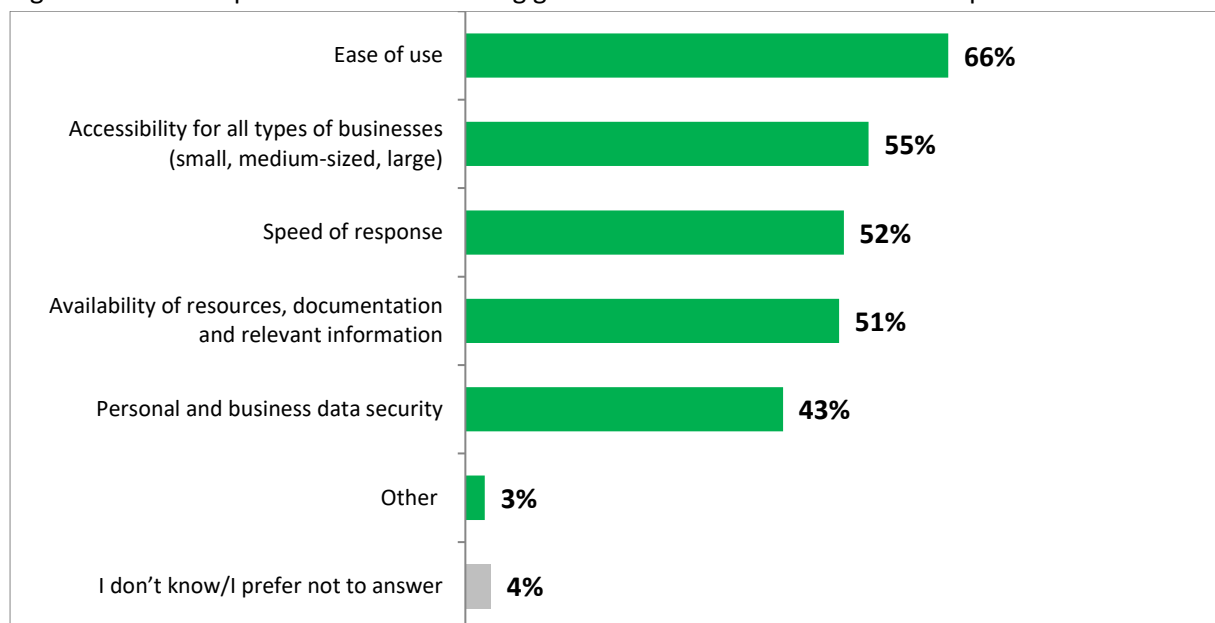
Business executives who are aware of CED (89%), who have a positive opinion of CED (93%) or who trust CED (88%) are more likely to prefer the government website to access government services for online economic development aid. Executives of companies headquartered outside the Montréal and

Quebec City CMAs (14%), companies with five or fewer employees (12%), companies not funded by CED (12%), or those not familiar with CED (11%) are more likely not to use the channels presented.

Most important criteria for using government online economic development aid services

Respondents were asked what criteria were most important to them when using government online economic development aid services. User-friendliness (66%) tops the list, followed by accessibility for all types of business (small, medium or large) (55%), speed of response (52%), availability of resources, documentation and relevant information (51%) and security of personal and business data (43%). What’s more, 3% of respondents who use these online services stressed the importance of other criteria, while 4% said they weren’t sure or preferred not to answer.

Figure 19: Most important criteria for using government online economic development aid services*



Q14. What criteria are most important to you when using government online economic development aid services?

Base: Respondents who use government online economic development aid services (n=190)

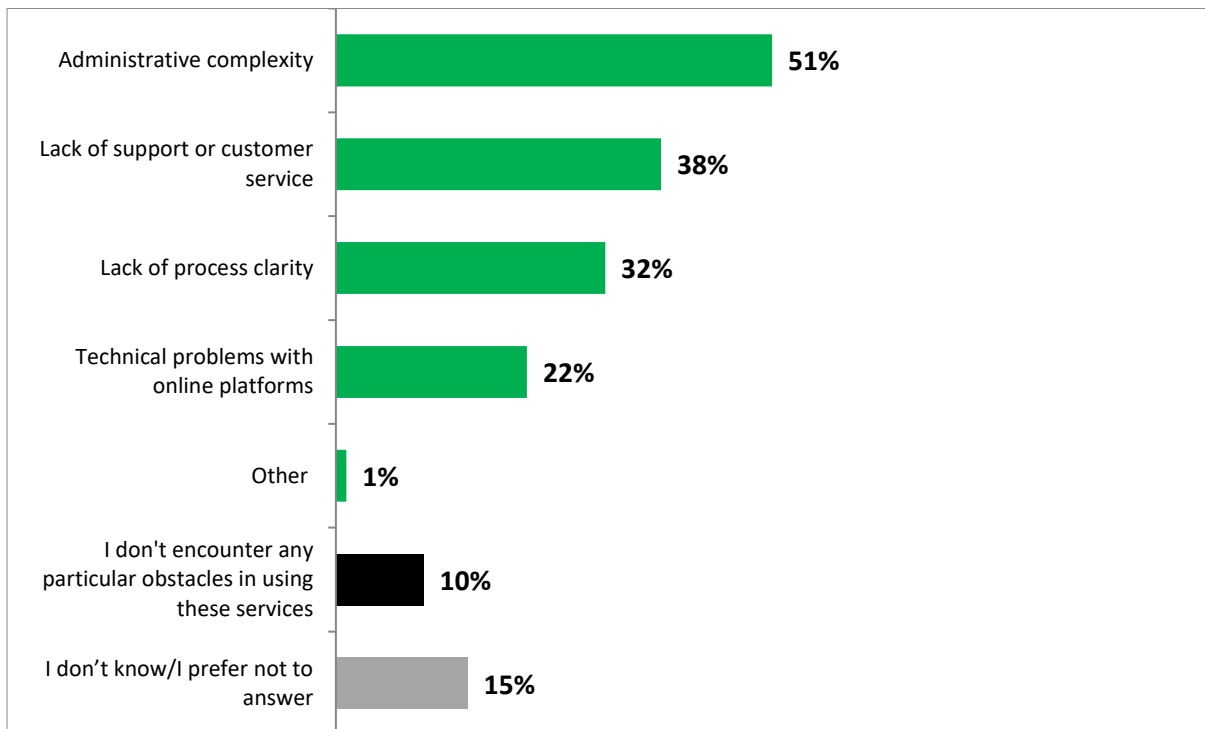
*Since respondents have the possibility to give up to four answers, the total may exceed 100%.

Business executives in the retail sector (65%) are more likely to prioritize speed of response, while those in NPOs are more likely to prioritize the availability of resources, documentation and relevant information (65%).

Obstacles encountered when using online government economic development aid services

Respondents who use government online economic development aid services were asked about the obstacles they encounter. Administrative complexity remains the most frequent obstacle when using these government services (51%), followed by lack of support or customer service (38%), lack of clarity on processes (32%), technical problems with online platforms (22%). Otherwise, 1% encountered other obstacles, while 10% of respondents who used government online economic development aid services encountered no obstacles at all. Finally, 15% of business executives who used online economic development aid services refused to answer or said they weren’t sure.

Figure 20: Obstacles encountered when using online government economic development aid services*



Q16. What obstacles do you currently encounter in using government online economic development aid services?

Base: Respondents who use government online economic development aid services (n=190)

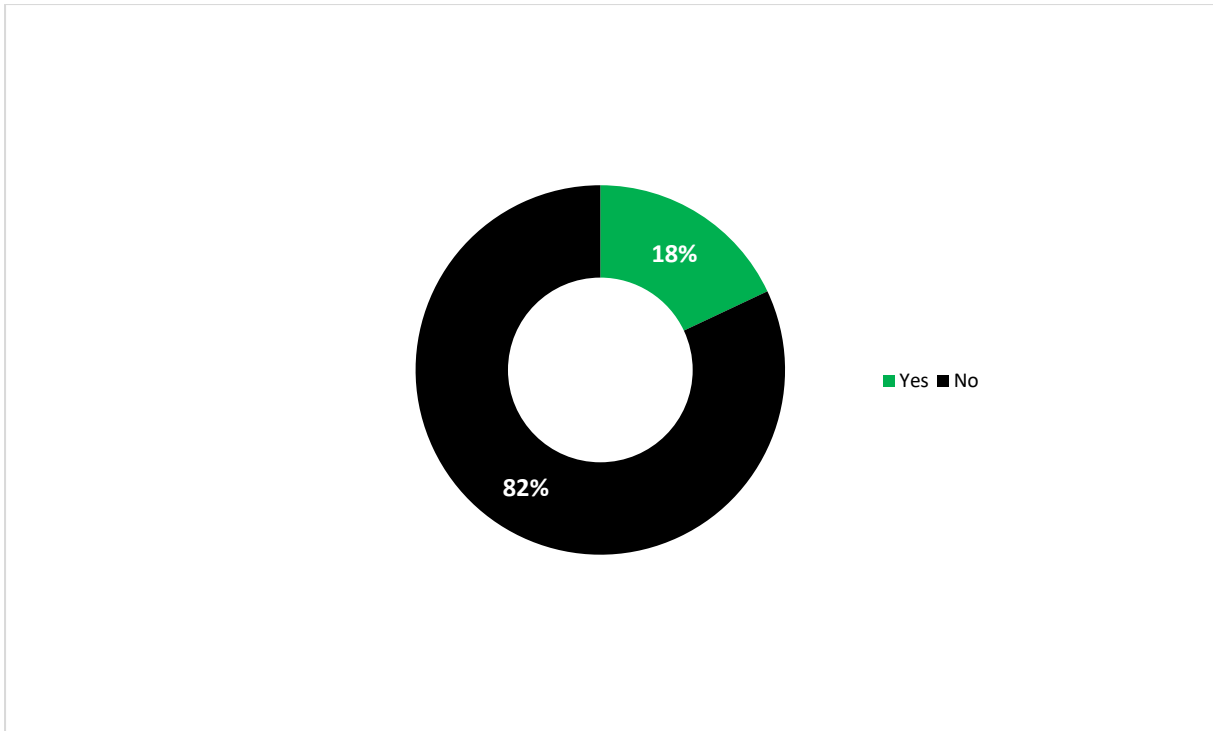
*Since respondents have the possibility to give up to four answers, the total may exceed 100%.

SME executives (35%) were more likely to be disappointed by the lack of process clarity when using government online economic development services.

Knowledge of CED's referral service for financing programs and entrepreneurial resources

Respondents who were aware of Canada Economic Development for Québec Regions (CED) were asked if they were aware that it offers a free referral service for financing programs, entrepreneurial resources and market information. 18% said they were familiar with the service, while 82% said they were not.

Figure 21: Knowledge of CED's referral service for financing programs and entrepreneurial resources



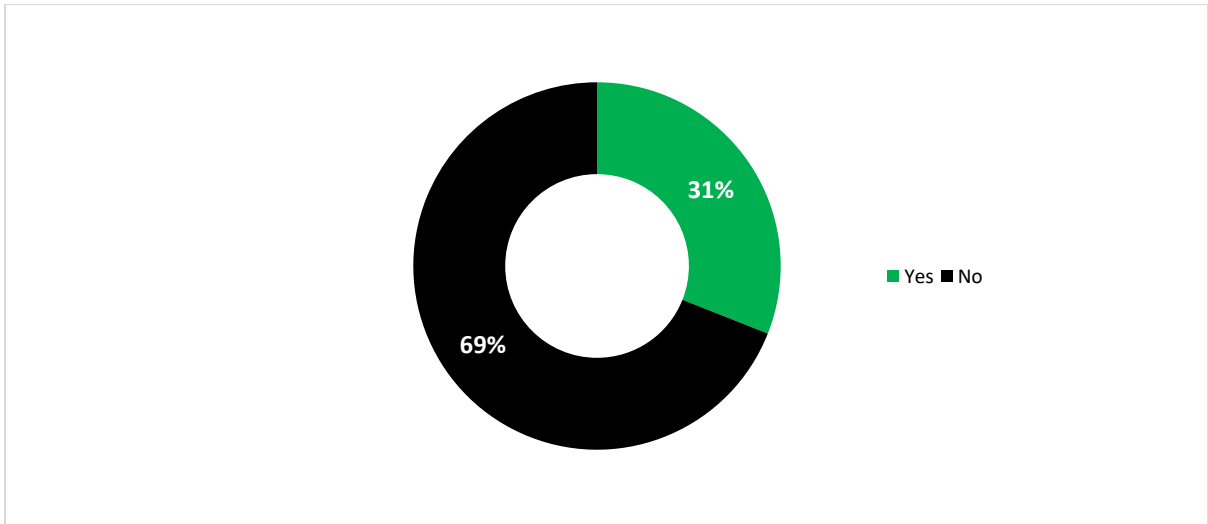
Q17a. Did you know that Canada Economic Development for Québec Regions (CED) has been offering a free referral service for financing programs, entrepreneurial resources and market information since October 1?

Base: Respondents aware of Canada Economic Development for Québec Regions (CED) (n=84)

Use of CED's referral service for financing programs and entrepreneurial resources

Respondents who are aware of CED's referral service for financing programs and entrepreneurial resources were asked if they have used this service. Of these, 31% have used the service, while 69% have never used it.

Figure 22: Use of CED's referral service for financing programs and entrepreneurial resources



Q17b. Have you used this service?

Base: Respondents who are aware of CED’s referral service for financing programs, entrepreneurial resources and market information (n=16)*

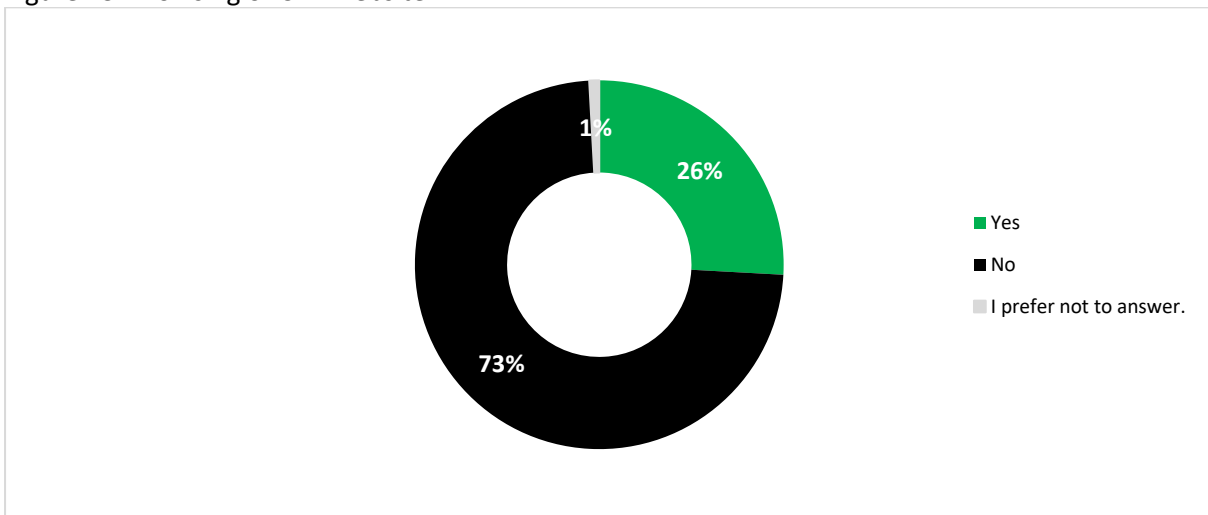
*Given the small number of respondents (n <30), results are presented for information purposes only.

CED website browsing and presence of businesses on social media

Browsing of CED website

All respondents were asked if they had visited the Canada Economic Development for Québec Regions (CED) website. Just over a quarter of respondents (26%) said they had already visited the CED website, with 73% of respondents had not visited the CED website. 1% preferred not to answer.

Figure 23: Browsing of CED website



Q18a. Have you ever visited the Canada Economic Development for Québec Regions (CED) website?

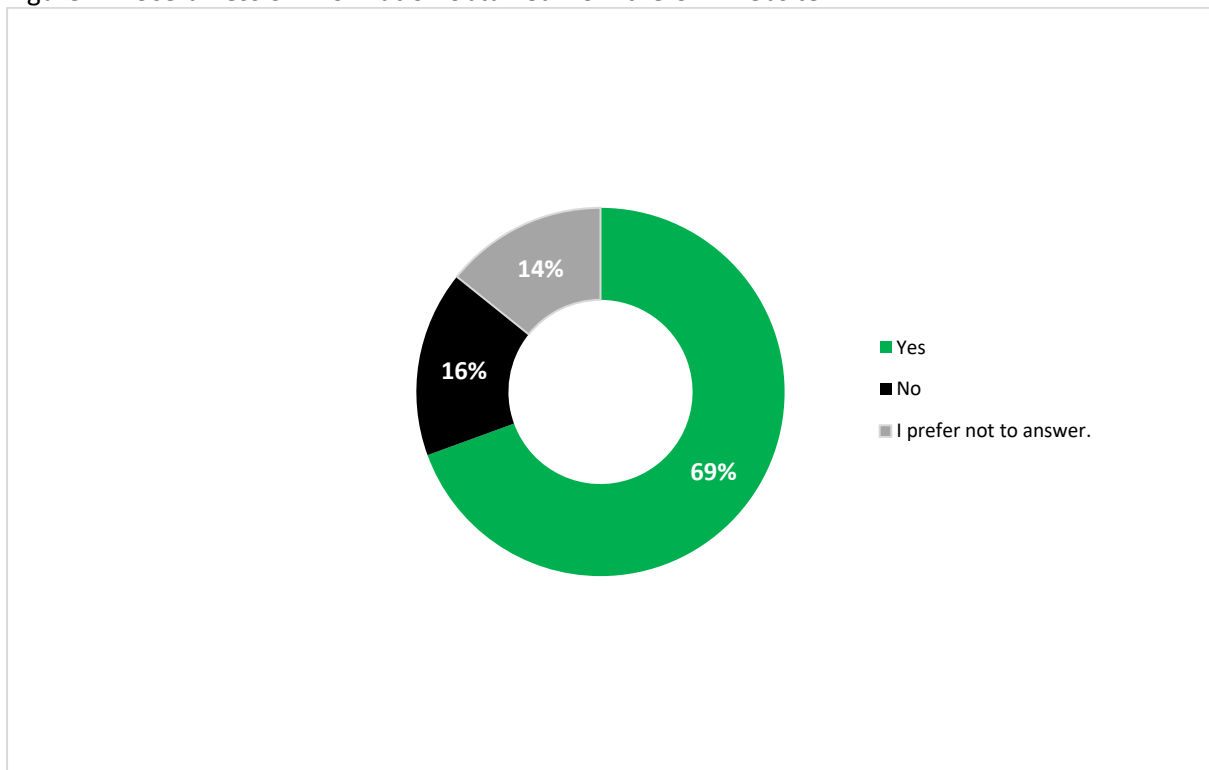
Base: All respondents (n=202)

In terms of who has visited the website, NPO executives (47%), business executives who have a positive opinion of CED (42%), business executives who know CED (41%) and business executives who trust CED (35%) have visited the Canada Economic Development for Québec Regions (CED) website in larger numbers.

Usefulness of information obtained from the CED website

Respondents who had already browsed the CED website were asked if they found the information useful. Nearly seven out of ten respondents (69%) found the information they obtained from the CED website useful. On the other hand, 16% did not find it useful, while 14% preferred not to answer.

Figure 24: Usefulness of information obtained from the CED website



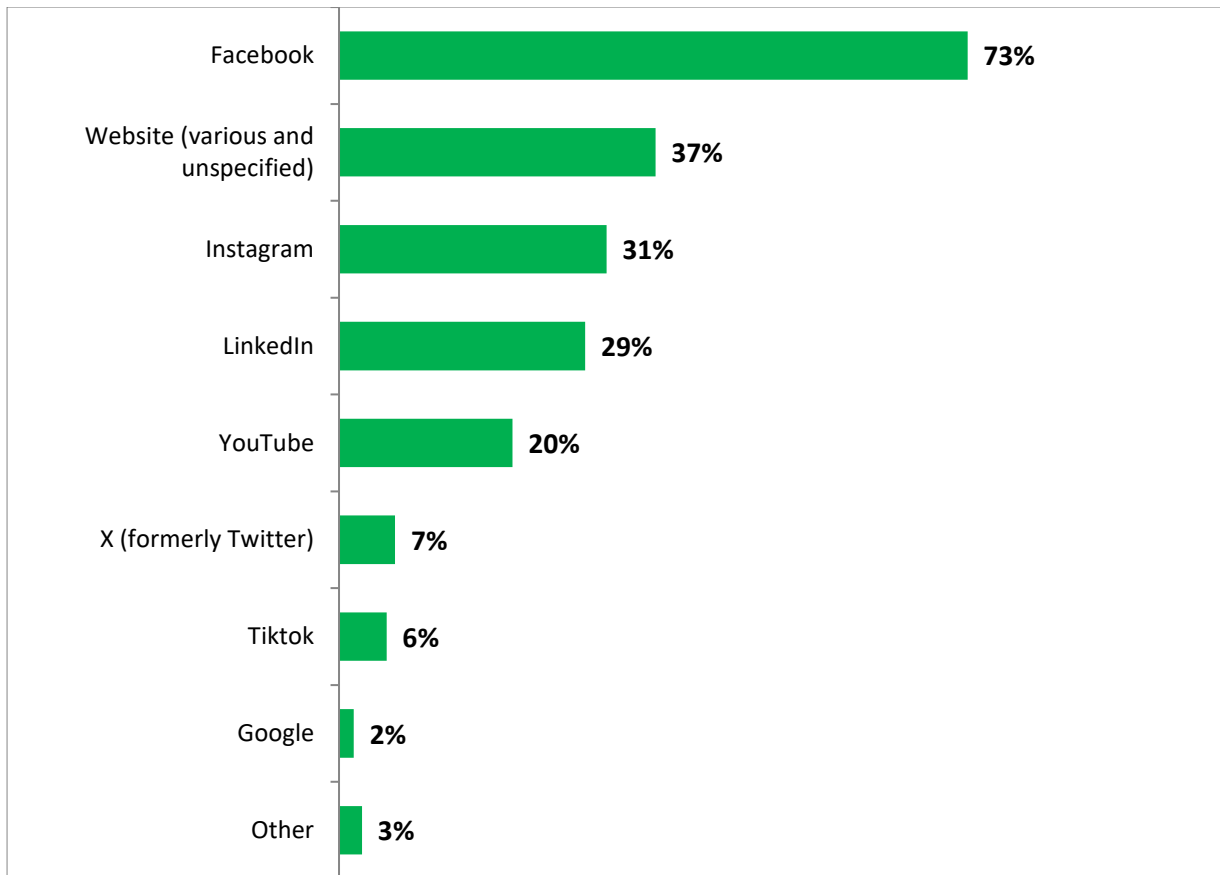
Q18b. Did you find the information you obtained on the Canada Economic Development for Québec Regions (CED) website useful?

Base: Respondents having visited the CED website (n=48)

Company presence on social media platforms

All respondents were asked about their organization's presence on various social media platforms. Facebook (73%) emerged as the most commonly used platform by businesses, followed by websites (37%), Instagram (31%), LinkedIn (29%) and YouTube (20%). In addition, 7% of companies are present on X (formerly Twitter), 6% on TikTok and 2% on Google. Also, 3% of respondents indicated that their company has a presence on other social media.

Figure 25: Company presence on social media platforms



Q19. Please indicate on which of the following social media platforms your organization has a presence. Base: All respondents (n=202)

More NPOs are more present on Facebook (94%) or YouTube (37%), while SMEs are more present on LinkedIn (32%). The latter is also used more by companies operating in sectors other than retail, accommodation, tourism or recreation (37%). Companies operating in the accommodation, tourism and recreation sector are more likely to have a presence on Instagram (49%). Companies with sales of over \$1 million are more likely to have a presence on YouTube (29%) than those with sales of less than \$1 million (12%).

Appendix A - Detailed Research Methodology

A.1 Methods

The quantitative study consisted of telephone interviews conducted using a computer-assisted telephone interviewing system (CATI technology). This approach guarantees a high level of representativeness. Léger adheres to the strictest rules of the research industry when it comes to quantitative surveys. The questionnaire was also developed in accordance with the Standards for the Conduct of Government of Canada Public Opinion Research—Series B-Fieldwork and data tabulation for telephone surveys.

Respondents were assured of the voluntary and confidential nature of the approach, and of the anonymity of their answers. As with all research conducted by Léger, all information likely to identify respondents has been removed from the data, in compliance with Canada’s Privacy Act.

Interviews were conducted from virtual call centres in Montréal. The Montréal call centre has three distinct divisions of interviewers: one team composed exclusively of English-speaking interviewers, another composed exclusively of French-speaking interviewers, and the last composed of bilingual interviewers. These divisions ensure that all telephone surveys can easily be conducted in either official language.

A.2 Data collection

Data collection was carried out from March 19 to April 12, 2024. A pretest consisting of 10 interviews in both official languages was conducted on March 19. More specifically, 9 interviews were conducted in French and 1 in English. Interviews lasted a median of 25 minutes. A total of 202 decision-makers from Québec companies were surveyed. The national margin of error for the survey is +/- 6.9%, 19 times out of 20.

Sample of 202 Québec business executives

For this study, flexible quotas were set to ensure a sufficient number of interviews with business executives in each region of Québec. The following table details the flexible regional quotas.

Table 1. Flexible regional quotas

Region	Flexible quotas	Number of interviews conducted
Greater Montréal area* (Lanaudière, Laurentides, Laval, Montérégie, Montréal)	50	18
Les Capitales (Capitale-Nationale, Outaouais)	50	54
Intermediate regions (Centre-du-Québec, Chaudière-Appalaches, Estrie, Mauricie)	50	57
Resource regions (Abitibi-Témiscamingue, Bas-Saint-Laurent, Côte-Nord, Gaspésie-Les Îles, Nord-du-Québec, Saguenay-Lac-Saint-Jean)	50	73
Total	200	202

A.3 Sampling procedures

The sampling frame was established using the lists provided by CED as a starting point, supplemented by the research firm to ensure a representative sample. For its samples, Léger works with ASDE (Survey Sampler: <https://surveysampler.com/>). Léger has worked with ASDE on surveys for a number of years due to the quality of their sample, which has been demonstrated on numerous occasions. Telephone interviews were conducted using Léger’s computer-assisted telephone interviewing system (CATI technology).

A.4 Call distribution

The overall response rate for this study was 19.93%. The participation rate is calculated using the following formula: participation rate = $R \div (U + IS + R)$. The table below shows the calculation in detail:

Table 2. Determining call and response rates

Base sample	7,338
Invalid numbers	42
Out of service	5
Non-residential	10
Fax / modem / pager	26
Duplicate	1
Unresolved units (U)	505
No answer	119
Answering machine	378
Line busy	8
REAL SAMPLE*	
In-scope non-reporting units (IS)	379
Respondent refusal	361
Language barrier	18
Reporting units (R)	220
Quota attained	0
Disqualified	2
Not completed	13
Appointments	2
Completed interviews	203
Participation rate	19.93%

A.5 Unweighted and weighted samples

A baseline comparison of weighted and unweighted samples was carried out in order to identify potential non-response bias that might be introduced by lower response rates in certain demographic subgroups.

Based on data from Statistics Canada’s 2021 national census, Léger weighted the results of this survey according to the number of employees and the industry sector of the companies. The following tables show these weighted and unweighted samples.

Table 2. Unweighted and weighted sample distribution by number of employees

Number of employees	Unweighted	Weighted
5 employees or less	94	93
6-50 employees	97	97

51-100 employees	7	9
101-500 employees	4	3
Total	202	202

Table 3. Unweighted and weighted sample distribution by business sector

Business sector	Unweighted	Weighted
Retail	59	44
Accommodation/hotel	22	12
Recreation/sports	9	9
Tourism	7	7
Restaurants	3	4
Arts, entertainment, culture	18	24
Manufacturing (other and unspecified)	12	18
Machinery manufacturing	9	14
Services (miscellaneous and unspecified)	10	10
Health/social services	8	9
Construction	5	7
Distribution/wholesale	6	7
Forest industry	5	6
Telecommunications	3	4
Community organization/NPO	5	4
Logistics and freight forwarding	4	4
Food industry	3	3
Economic development organization	1	2
Furniture	2	2
Medical equipment manufacturing	1	2
Wood products	1	1
Others	9	9
Total	202	202

A.6 Weighting factors

Certain subgroups of respondents tend to be underrepresented or overrepresented in a given sample compared to the general population. Sample weighting is used to correct for differences in the representation of the various subgroups in the sample, compared with what is usually observed in the overall population of a study. The weighting factors are therefore the weight given to each respondent corresponding to a subgroup of the sample. The following tables illustrate the proportions attributed to each target population in the sample.

Table 10 Weighting factors by number of employees

Label	Weighting
1-4 employees	48.583

5-9 employees	21.995
10-19 employees	13.778
20-249 employees	15.644
Total	100

Table 11 Weighting factors by business sector (with NAICS CODES)

Label	Weighting
21- Mining, quarrying, and oil and gas extraction	0.15
31-33 - Manufacturing	40.488
44-45 - Retail	22.567
48 - Transportation and warehousing	2.112
51- Information and cultural industries	6.787
71 - Arts, entertainment, and recreation	9.022
72 - Accommodation and food services	7.563
81 - Other services (except public administration)	11.311
Total	100

Appendix B - Questionnaire

AWARENESS AND REPUTATION SURVEY - REVIEW OF 2017 QUESTIONS

Page info

[ASK ALL]

QINF.

INTRODUCTION

Bonjour/Hello (pause), the Government of Canada is currently conducting a survey of Québec businesspeople. Préférez-vous que je continue en français ou en anglais? Would you prefer that I continue in English or French?

[Note: If, at this point, the respondent prefers to answer in English, then the interviewer should continue the interview in English or read the following sentence: "Thank you. Someone will call you back soon to complete the survey in English."]

My name is **FIRST NAME**, from Léger, a public opinion research firm hired to conduct this survey. The survey lasts approximately 16 minutes and is registered with the Canadian Research Insights Council (CRIC)*. Your participation is voluntary and completely confidential. Your responses will remain anonymous. May I continue?

- Yes = CONTINUE TO **RDD1**.
- NO = THANK AND TERMINATE

***[Note to interviewer: If asked, please read:]** The survey is registered with the Canadian Research Insights Council (CRIC) in accordance with Government of Canada standards. To verify the authenticity of this survey, you can visit the Canadian Research Insights Council website and enter the following code on the site: 20240314-LE259.

Website: <https://www.canadianresearchinsightscouncil.ca/rvs/home/?lang=en>

RDD1.

Are you talking to me on a cell phone? (**DO NOT READ**)

Label	Value	Attribute	Termination
Yes	1		
No	2		

[IF RDD1 = YES, ASK CELL1]

CELL1.

Can you talk on the phone safely? (**DO NOT READ**)

Yes

No

[IF CELL1=NO READ:] We'd love to conduct this survey with you when it's safe and convenient for you to do so. Thank you for your time. We'll call you back at a more convenient time.

CELL2.

Is this a convenient time? (**DO NOT READ LIST**)

Yes [CONTINUE]

No [SCHEDULE CALL BACK]

QEMPLOYEES

Including yourself, how many employees (full time and part time) does your company or organization currently have?

Label	Value	Attribute	Termination
5 employees or less	1		
6-50 employees	2		
51-100 employees	3		
101-500 employees	4		
500 employees or more	5		TERMINATE

QHEAD OFFICE

Where is the head office of your company or organization located?

Label	Value	Attribute	Termination
BAS-SAINT-LAURENT	1		
SAGUENAY/LAC-SAINT-JEAN	2		
QUÉBEC – CMA	3		
MAURICIE	4		
ESTRIE	5		
MONTRÉAL	6		
OUTAOUAIS	7		
ABITIBI-TÉMISCAMINGUE	8		
CÔTE-NORD	9		
GASPÉSIE	11		
CHAUDIÈRE-APPALACHES - CMA	12		
LAVAL	13		
LANAUDIÈRE - CMA	14		
LAURENTIDES - CMA	15		
MONTÉRÉGIE - CMA	16		
LANAUDIÈRE- OTHER	24		
LAURENTIDE- OTHER	25		
MONTÉRÉGIE- OTHER	26		
CHAUDIÈRE-APPALACHES - OTHER	32		
QUEBEC - OTHER	33		
CENTRE-DU-QUÉBEC	17		

FLEXIBLE QUOTAS

Label	Value	FLEXIBLE QUOTA
Greater Montréal area	Lanaudière, Laurentides, Laval, Montérégie, Montréal	50
Les Capitales	Capitale-Nationale, Mauricie	50

Intermediate regions	Centre-du-Québec, Chaudière-Appalaches, Estrie, Mauricie	50
Resource regions	Abitibi-Témiscamingue, Bas-Saint-Laurent, Côte-Nord, Gaspésie-Les Îles, Nord-du-Québec, Saguenay-Lac-Saint-Jean	50

Q20.

What position do you occupy in your organization?

Label	Value	Attribute	Termination
President or General Manager/Owner	1		
Co-owner/Associate	2		
Vice President	3		
Regional director	4		
Service or department manager/Assistant manager	5		
Executive/Manager	6		
Administrator	7		
Other	96		TERMINATE
(DO NOT READ) I prefer not to answer	99	F	TERMINATE

QSECT:

What is the main business sector of your company or organization?

Label	Value	Attribute	Termination
Aerospace	1		
Aluminum	2		
Retail	3		
Energy	4		
Machinery manufacturing	5		
Medical equipment manufacturing	6		
Forest industry	7		
Software and video games	8		
Logistics and freight forwarding	9		
Furniture	10		
Mining	11		
Economic development organization	12		
Wood products	13		
Plastic and rubber products	14		
Other industry	96		TERMINATE
I don't know	98		TERMINATE
I prefer not to answer.	99		TERMINATE

Q1.

Can you name the organization or organizations you know of that are responsible for promoting the long-term economic development of Québec's regions?

Label	Value	Attribute	Termination
Please enter the name of the organization	96	O	
(DO NOT READ) I don't know/I prefer not to answer	99	X	

[RANDOMIZE]

Q2A.

Overall, would you say you have a **very positive, somewhat positive, neither positive nor negative, somewhat negative** or **very negative** opinion of the following organizations or institutions?

Label	Value	Attribute	Termination
Very positive	1		
Somewhat positive	2		
Neither positive nor negative	3		
Somewhat negative	4		
Very negative	5		
I don't know enough about the organization to have an opinion	6		
I don't know this organization	7		
(DO NOT READ) I don't know/I prefer not to answer	98	F	

Label	Value	Attribute	Termination
Canada Economic Development for Québec Regions (CED)	1		
Business Development Bank of Canada (BDC)	2		
Investissement Québec	3		
Société d'aide au développement des collectivités (SADC)/Centre d'aide aux entreprises (CAE)	4		
Innovation, Science and Economic Development Canada (ISDEC)	5		
Export Development Canada (EDC)	6		
Ministère de l'Économie, de l'Innovation et de l'Énergie (MEIE)	7		

[ASK IF ELI 1.2=4.5]

Q2B.

In a few words, why do you say you have a <Q2A- insert only positive or negative term> opinion of Canada Economic Development for Québec Regions (CED)?

Label	Value	Attribute	Termination
Specify	96	O	
(DO NOT READ) I don't know/I prefer not to answer	99	X	

[ASK IF Q2A_1=1 to 6]

Q3.

How did you hear about Canada Economic Development for Québec Regions (CED)?

Label	Value	Attribute	Termination
Specify	96	O	
(DO NOT READ) I don't know/I prefer not to answer	99	X	

[MULTIPLE ANSWERS]

[RANDOMIZE]

Q4.

Have you ever obtained financing or support from any of the following organizations for an economic development project?

[(Please select all that apply)]

Label	Value	Attribute	Termination
Canada Economic Development for Québec Regions (CED)	1		
Business Development Bank of Canada (BDC)	2		
Investissement Québec	3		
Société d'aide au développement des collectivités (SADC)/ Centre d'aide aux entreprises (CAE)	4		
Export Development Canada (EDC)	5		
Innovation, Science and Economic Development Canada (ISDEC)	6		
Ministère de l'Économie, de l'Innovation et de l'Énergie (MEIE)	7		
Other organizations (Please specify).	96		
None of these organizations	97		

[ASK IF Q2A_1=1 to 6]

Q5.

As far as you know, in addition to promoting the economic development of Québec's regions, what are the main objectives of Canada Economic Development for Québec Regions (CED)?

Label	Value	Attribute	Termination
Specify	96	O	
(DO NOT READ) I don't know/I prefer not to answer	99	X	

[ASK IF Q2A_1=1 to 6]

Q6.

Canada Economic Development for Québec Regions (CED)'s mission is to promote the long-term economic development of the regions of Québec by giving special attention to those where slow economic growth is prevalent. CED helps businesses get off the ground and perform. It helps them become more innovative, productive and competitive. It supports efforts to mobilize the community

in the various regions of Québec and attract investment aimed at boosting the prosperity of the Québec economy.

CED strives to contribute to the economic vitality of all Québec regions by capitalizing on their regional competitive advantages. It supports transition and diversification in communities that remain dependent on a limited number of sectors or have suffered an economic shock.

Based on this definition, to what extent do you agree with the following statement? “CED is successful in meeting the objectives of its mission.”

- a) Totally agree (1)
- b) Somewhat agree (2)
- c) Somewhat disagree (3)
- d) Totally disagree (4)
- e) (DO NOT READ) I don't know/I prefer not to answer (99)

[ASK IF Q2A_1=1 to 6]

Q7A.

Please tell me whether you totally agree, somewhat agree, neither agree nor disagree, somewhat disagree or totally disagree with the following statements about Canada Economic Development for Québec Regions (CED).

Label	Value	Attribute	Termination
Totally agree	1		
Somewhat agree	2		
Neither agree nor disagree	3		
Somewhat disagree	4		
Totally disagree	5		
(DO NOT READ) I don't know/I prefer not to answer	99	F	

ORDER OF STATEMENTS

Label	Value	Attribute	Termination
Canada Economic Development for Québec Regions (CED) promotes business growth	1		
Canada Economic Development for Québec Regions (CED) is an innovative and proactive organization	2		
Canada Economic Development for Québec Regions (CED) offers fast, efficient service	3		
Canada Economic Development for Québec Regions (CED) demonstrates extensive expertise in economic development	4		
Canada Economic Development for Québec Regions (CED) responds and adapts quickly to the changing context of Québec's regions	5		
Canada Economic Development for Québec Regions (CED) communicates effectively about its programs and services	6		

[ASK IF Q2A_1=1 to 6]

Q7B.

Now, please tell me whether you totally agree, somewhat agree, neither agree nor disagree, somewhat disagree or totally disagree with the following statements about Canada Economic Development for Québec Regions (CED).

Label	Value	Attribute	Termination
Agree Completely	1		
Somewhat agree	2		
Neither agree nor disagree	3		
Somewhat disagree	4		
Strongly disagree	5		
(DO NOT READ) I don't know/I prefer not to answer	99	F	

ORDER OF STATEMENTS

Label	Value	Attribute	Termination
Canada Economic Development for Québec Regions (CED) promotes the participation of Indigenous peoples in CED programs and Québec's economic growth.	1		
Canada Economic Development for Québec Regions (CED) promotes the participation of Black and racialized entrepreneurs in CED programs and Québec's economic growth. READ IF NECESSARY: Racialized communities are non-Indigenous, non-white or non-white-skinned people (e.g., South Asian, Chinese, Black, Filipino, Latin American, Arab, Southeast Asian, West Asian, Korean and Japanese).	2		
Canada Economic Development for Québec Regions (CED) promotes the participation of women entrepreneurs in CED programs and Québec's economic growth.	3		
Canada Economic Development for Québec Regions (CED) promotes the participation of young entrepreneurs in CED programs and Québec's economic growth. READ IF NECESSARY: "Young" refers to people under the age of 40.	4		
Canada Economic Development for Québec Regions (CED) promotes the participation of 2SLGBTQI+ entrepreneurs in CED programs and in Québec's economic growth. READ IF NECESSARY: The term 2SLGBTQI+ refers to people who identify as belonging to the two-spirited, lesbian, gay, bisexual, transgender, queer, intersex or various sexual and gender groups.	5		
Canada Economic Development for Québec Regions (CED) promotes the participation of entrepreneurs from official language minority communities in CED programs and in Québec's economic growth.	6		

<p>READ IF NECESSARY: The term “official language minority communities” refers to people whose first official language spoken is the minority official language in the province or territory of residence. In Québec, these are English-speaking entrepreneurs.</p>			
<p>Canada Economic Development for Québec Regions (CED) promotes the participation of entrepreneur immigrants or newcomers to Canada in CED programs and in Québec’s economic growth.</p> <p>READ IF NECESSARY: The term “immigrants or newcomers to Canada” refers to people who are, or have been, landed immigrants or permanent residents, and who have been granted the right to reside in Canada on a permanent basis by immigration authorities. Immigrants who have obtained Canadian citizenship through naturalization are included in this group. Newcomers are considered recent landed immigrants who arrived in Canada within the last five years.</p>	7		
<p>Canada Economic Development for Québec Regions (CED) promotes the participation of entrepreneurs with disabilities in CED programs and in Québec’s economic growth.</p> <p>READ IF NECESSARY: The term “with disabilities” refers to people with lasting or recurring impairments in physical, mental, sensory, psychiatric or learning capacities.</p>	8		

[ASK IF Q2A_1=1 to 6]

Q8.

For each of the following activities carried out by Canada Economic Development for Québec Regions (CED), please tell me whether you consider it a very, somewhat, not very or not at all important function.

Label	Value	Attribute	Termination
Very important	1		
Somewhat important	2		
Not very important	3		
Not important at all	4		
(DO NOT READ) I don’t know/I prefer not to answer	99	F	

ORDER OF STATEMENTS

Label	Value	Attribute	Termination
Canada Economic Development for Québec Regions (CED) supports the economic development of Québec regions experiencing slow economic growth and insufficient job opportunities.	1		
Canada Economic Development for Québec Regions (CED) is an organization that supports companies	2		

involved in the clean-growth economy (clean/green technology).			
Canada Economic Development for Québec Regions (CED) encourages small and medium-sized businesses to become more productive, innovate and market their products.	3		
Canada Economic Development for Québec Regions (CED) offers networking services that help SMEs identify business opportunities, such as in the defence sector.	4		
Canada Economic Development for Québec Regions (CED) offers market information and referrals to financing programs and resources that meet the business needs of entrepreneurs.	5		
Canada Economic Development for Québec Regions (CED) supports the development and promotion of Québec's regional tourism offering.	6		
Canada Economic Development for Québec Regions (CED) promotes the development of community infrastructure in Québec communities.	7		

Q9.

Could you please tell me to what extent you have confidence in the following organizations to ensure economic development in your region? (A lot, enough, a little, not at all.)

Label	Value	Attribute	Termination
A lot	1		
Enough	2		
A little	3		
Not at all	4		
(DO NOT READ) I don't know. / I prefer not to answer.	99	F	

ORDER OF STATEMENTS

Label	Value	Attribute	Termination
Banks and/or credit unions	1		
Canada Economic Development for Québec Regions (CED)	2		
Other federal departments and agencies, such as Innovation, Science and Economic Development Canada (ISDEC)	3		
Provincial departments and agencies	4		
Business Development Bank of Canada (BDC)	5		
Société d'aide au développement des collectivités (SADC)/ Centre d'aide aux entreprises (CAE)	6		
Investissement Québec	7		
Chamber of Commerce	8		

Regional funds	9		
Your city and/or municipality	10		
Your Regional County Municipality (RCM)	11		
Ministère de l'Économie, de l'Innovation et de l'Énergie (MEIE)	12		

Q10.

If you were looking for information to help you finance your business projects, which information source would you consult first? [DO NOT READ]

Label	Value	Attribute	Termination
Financial institutions (banks, credit unions, etc.)	1		
Not-for-profit or para-public organizations providing assistance to entrepreneurs (Chambers of Commerce, Centre local de développement, etc.)	2		
Departments, agencies and public organizations (city/municipality, Canada Economic Development for Québec Regions (CED), BDC, etc.):	3		
Private business development consultants	4		
Business sections of daily newspapers or specialized business journals and magazines	5		
Websites specializing in financial and economic issues	6		
Specialized blogs for businesspeople	7		
Newsletters from business organizations	8		
Social media accounts of interest to businesspeople (e.g., influencer profiles on LinkedIn)	9		
Networking activities for businesspeople (forums, symposiums, workshops, roundtables, luncheon conferences, etc.)	10		
Another source of information (please specify)	96	O	
None	97		
(DO NOT READ) I don't know/I prefer not to answer	98	F	

[SINGLE CHOICE]

Q11.

What type of government assistance or economic development aid are you primarily looking for?

- a) Financing (1)
- b) Access to resources and information (2)
- c) Training and skills development (3)
- d) Coaching and mentoring (4)
- e) Other (please specify) _____ (96)
- f) No assistance (97)
- g) I don't know / I prefer not to answer (99)

Q12A.

How do you prefer to access government economic development aid services?

- a) Online only (1)

- b) In person or by telephone only (2)
- c) A combination of online and in-person or telephone access (3)
- d) No preference (4)

Q12B.

How important is it for you to get real-time service, either in person or by phone?

- a) Very important (1)
- b) Somewhat important (2)
- c) Not very important (3)
- d) Not important at all (4)
- e) (DO NOT READ) I don't know/I prefer not to answer (99)

[SINGLE CHOICE]

[ASK IF Q12≠A2]

Q13.

When you're online, which channel do you prefer to use to access government economic development aid services?

- a) Government website (1)
- b) The social media platforms of organizations (2)
- c) Government mobile applications (for example, the Government of Canada's "BizAPP" or "Business Tax Reminders" applications) (3)
- d) Other (Please specify)_____ (96)
- e) None (97)
- f) I don't know / I prefer not to answer (99)

[ASK IF Q12≠A2]

[MULTIPLE ANSWERS]

Q14.

What criteria are most important to you when using government online economic development aid services?

Note: Please select all that apply.

- a) User-friendliness (1)
- b) Speed of response (2)
- c) Availability of resources, documentation and relevant information (3)
- d) Personal and business data security (4)
- e) Accessibility for all types of businesses (small, medium and large) (5)
- f) Other (Please specify)_____ (96)
- g) I don't know / I prefer not to answer (99)

[ASK IF Q12≠A2]

[MULTIPLE CHOICE]

Q16.

What obstacles do you currently encounter in using government online economic development aid services?

Note: Please select all that apply.

- a) Administrative complexity (1)
- b) Lack of process clarity (2)

- c) Technical problems with online platforms (3)
- d) Lack of support or customer service (4)
- e) I don't encounter any particular obstacles in using these services (97)
- f) Other (Please specify)_____ (96)
- g) I don't know / I prefer not to answer (99)

[ASK IF Q2A 1=1-6]

Q17A.

Did you know that Canada Economic Development for Québec Regions (CED) has been offering a free referral service for financing programs, entrepreneurial resources and market information since October 1?

- Yes (1)
- No (2)

[ASK IF Q17A =1]

Q17B.

Have you used this service?

- Yes (1)
- No (2)

Q18A.

Have you ever visited the Canada Economic Development for Québec Regions (CED) website?

Label	Value	Attribute	Termination
Yes	1		
No	2		
(DO NOT READ) I prefer not to answer	9	F	

[ASK IF Q18A=1]

Q18B.

Did you find the information you obtained on the Canada Economic Development for Québec Regions (CED) website useful?

Label	Value	Attribute	Termination
Yes	1		
No	2		
(DO NOT READ) I prefer not to answer	9	F	

Q19.

Please indicate on which of the following social media platforms your organization has a presence.

Label	Value	Attribute	Termination
LinkedIn	1		
Facebook	2		
X (formerly Twitter)	3		
Instagram	4		

TikTok	5		
YouTube	6		
Other (Please specify.)	96	O	

Label	Value	Attribute	Termination
Yes	1		
No	2		
(DO NOT READ) I don't know/I prefer not to answer	9	F	

COMPANY PROFILE BLOCK

Q21.

To the best of your knowledge, does the owner or manager of your company or organization self-identify as belonging to the following underrepresented groups?

- a) Black communities
- b) Racialized communities
- c) Women
- d) Youth
- e) 2SLGBTQI+
- f) Members of official language minority communities
- g) Newcomers to Canada and immigrants
- h) People with disabilities
- i) Indigenous peoples

Q22.

Is your company an SME (small or medium-sized enterprise) or an NPO (non-profit organization)?

Label	Value	Attribute	Termination
An SME	1		
An NPO	2		
(DO NOT READ) I don't know	98	F	

QSALES

What were your company's approximate sales (in Canadian dollars) for your last fiscal year?

Label	Value	Attribute	Termination
Less than 1 million dollars	1		
1 to 4.9 million dollars	2		
5 to 9.9 million dollars	3		
10 to 49.9 million dollars	4		
50 million dollars or more	5		
Not applicable (e.g. NPO)			
(DO NOT READ) I don't know. / I prefer not to answer.	99	F	