



Eastern Ontario Economic  
Development Strategy Refresh

Appendix B

*Online Business Survey Results*



## Introduction

Eastern Ontario economic development survey 2018 was conducted to capture and better understand the needs of business community in the region. More than 250 participants ranging from business owners, managers and employees from diverse business sectors took part in it. The responders expressed their opinion on broad range of questions pertinent to current and future economic health of Eastern Ontario. The survey was conducted through online medium based on 25 revealing questions. A similar survey was administered in 2013. The analysis below presents the answers from this year and where applicable compares it with 2013 responses to identify any major shift in opinions.

In addition, since public sector employees constituted the largest group (50 out of 257 participants), where applicable an additional column without involving this group's response is also presented to avoid any skewness.

Derived from Question 2-5 on this sheet				
Factor	2013	2018	Comparison from 2013	2018 (without public sector )
<b>Strength of own sector?</b>	52% 'flat' or 'modest' growth	<b>58%</b> 'flat' or 'modest' growth		56% 'flat' or 'modest' growth
<b>Strength of Eastern Ontario as a whole?</b>	52% 'flat' or 'modest' growth	<b>67%</b> 'flat' or 'modest' growth		67% 'flat' or 'modest' growth
<b>Overall optimism for regions future?</b>	66% 'somewhat' or very optimistic	<b>71%</b> 'somewhat' or very optimistic	5% more people are optimistic about region's future	71% 'somewhat' or very optimistic
<b>Optimism for your own sector?</b>	70% "somewhat or very" optimistic	70% "somewhat or very" optimistic	No change since 2013	<b>73%</b> "somewhat or very" optimistic
<b>Optimism for your own community?</b>	Not Applicable			
<b>Optimism for your own business?</b>	79% "somewhat or very" optimistic	<b>75%</b> "somewhat or very" optimistic	4% less people are sure about the prosperity of their business	<b>81%</b> "somewhat or very" optimistic



Derived from Question 2-5 on this sheet

Factor	2013	2018	Comparison from 2013	2018 (without public sector )
<b>Eastern Ontario as a place to grow a business?</b>	60% “good to excellent”	<b>68%</b> “good to excellent”	8% more people consider EO as good to excellent place to grow a business.	<b>67%</b> “good to excellent”
<b>Promoting eastern Ontario as a place to start/grow a business</b>	27% “good to excellent”	<b>47%</b> “good to excellent”	This section observed the highest increase since 2013 with 20% more people appreciating govt.'s role in promoting EO as a place to start business	<b>45%</b> “good to excellent”
<b>Advocating for improvements for Eastern Ontario?</b>	38% “good to excellent”	<b>50%</b> “good to excellent”	12% more people think that govt. is doing a good to excellent job in advocating for improvements in Eastern Ontario.	<b>46%</b> “good to excellent”

Derived from Question 16 on this sheet

Sector	2013	2018	Comparison
<b>Tourism and Hospitality</b>	69%	<b>80%</b>	<b>11% increase</b>
<b>Agriculture or value-add agricultural products</b>	60%	<b>69%</b>	<b>9% increase</b>
<b>Health care/health and wellness</b>	53%	<b>61%</b>	<b>8% increase</b>
<b>Cleantech (Environmental Technologies)</b>	48%	<b>59%</b>	<b>11% increase</b>
<b>Construction</b>	46%	<b>57%</b>	<b>11% increase</b>
<b>Recreation and Sports</b>	40%	<b>54%</b>	<b>14% increase</b>



Derived from Question 16 on this sheet			
Sector	2013	2018	Comparison
Energy - Renewable (Wind, Solar, Biomass, Hydroelectric)	50%	53%	3% increase
Arts, Culture and Entertainment	45%	53%	8% increase
Education and training (classroom-based or online)	45%	52%	7% increase
Transportation and Logistics	41%	51%	10% increase
Information and Communications Technology (ICT)	<40%	50%	

Derived from Q-12 on this sheet				
Priorities	2013	2018	Comments	2018 (without public sector response )
Access to capital/financing	33%	28%	Remained as top 3 priority for business community - but dropped from No.1 (2013) to No.3 in 2018	31%
Innovation Services (to stimulate development of new businesses, products or services)	32%	18%	Observed the <b>highest drop</b> slipping from No.2 to 9th place in priority	17%
Youth attraction and retention	31%	--		
Broadband/high-speed internet	29%	57%	Highest increase- making it the <b>top priority</b> in 2018	55%
Workforce – improve skill levels or education	23%	34%	Moved up to number 2 (2018) from no.5 in 2013	32%
Business networking (to encourage information-sharing, partnerships, joint	23%	19%	Dropped 4%	22%



Derived from Q-12 on this sheet				
Priorities	2013	2018	Comments	2018 (without public sector response )
bids/tenders)				
Advocacy with upper levels of government on business issues	20%	23%	Increased 3%	24%
Transportation infrastructure	20%	27%	Increased 7%	27%
Regional marketing programs	20%	14%	Dropped 6%	15%

## About Survey Responders

48% survey participants are business owners (12% business managers, 11% executives for a public sector , 10% employee for public or not for profit organization , 9% executive for a not for profit organization , 7% director or board member and 4% employee of a business).

Total survey participants (257) belong to various business sectors including public services, hospitality and tourism, retail, agriculture, manufacturing, healthcare, construction, IT, education etc.

90% responders have their business head office located in Eastern Ontario and 60% of them have been operating their business for 10 or more years

## Key Survey Findings

Key findings, emergent from the business community survey include the following:

- More than 50% responders agree that their business sector and Eastern Ontario region is showing either strong or steady growth (percentage of strong or steady growth response : sector = 58% , Eastern Ontario = 53% )
- At least 70% participants are optimistic about the future economic strength of their business, sector and Eastern Ontario as a whole (business = 75%, sector = 70%, Eastern Ontario = 71%: *percentage of 'optimistic or somewhat optimistic' responses*).

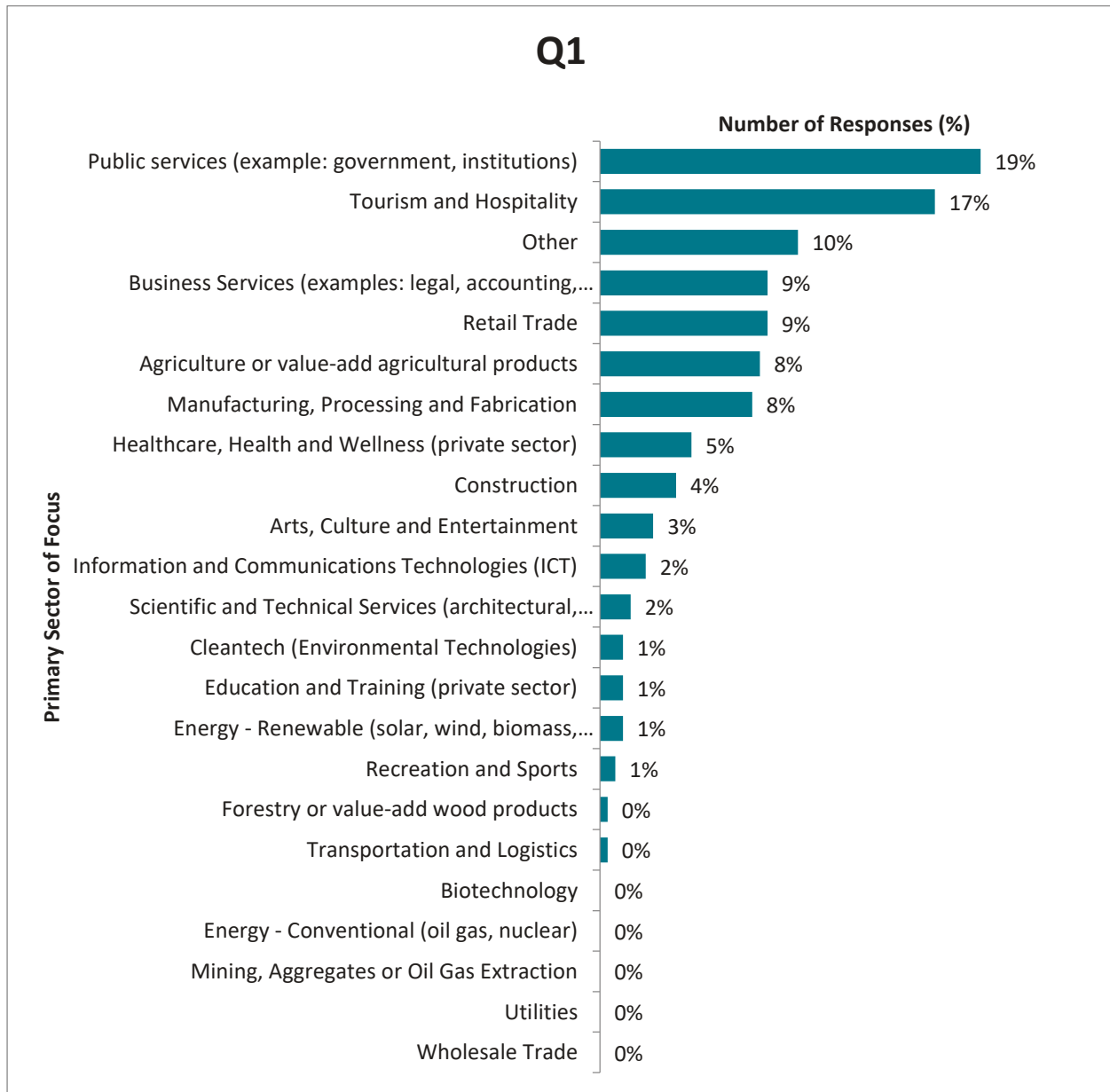


- Quality of life and availability of natural resources are considered the attributes providing highest **advantages** to regional businesses. The top two factors putting businesses at a **disadvantage** are lack of adequate high speed internet/broadband and inadequate number of skilled workforce.
- According to participants the top three focus areas to improve business performance in the region are
  - 1- Broadband and high speed internet (57%)
  - 2- Improving workforce skills and education (34%)
  - 3- Better access to capital financing (28%).
- 68% survey responders believe that Eastern Ontario is a good to excellent place to start or grow a business while only 5% suggested that it's a poor choice. (Excellent = 10% , Very good =22% , Good = 36% , fair =24% )
- At least 46% responders are satisfied with region's performance to promote and advocate for improvements to start and grow business ( performance on promoting region as a place to start business = 47%, performance on advocating for improvements=50%: %: *percentage of 'good or excellent' responses*)
- Tourism and hospitality is considered the top sector with major business opportunity in Eastern Ontario (187 votes ) closely followed by sector of agriculture products (161 votes )



## Survey Results

### Q1. What sector do you consider to be the PRIMARY SECTOR of focus for the BUSINESS YOU ARE REPRESENTING while completing this survey?

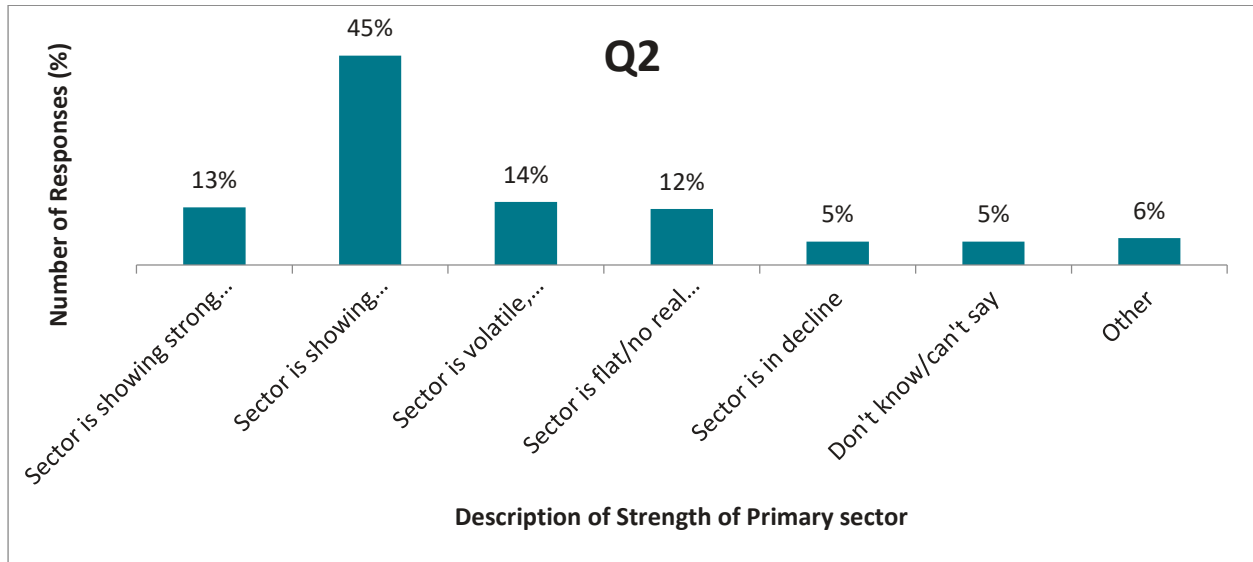


n=257



## Q2. How would you describe the ECONOMIC STRENGTH of the PRIMARY SECTOR in which your business operates?

58% responders believe that the economic strength of their business sector is showing strong or steady growth, 12% believe the sector is in volatile phase while 5% think sector is in decline

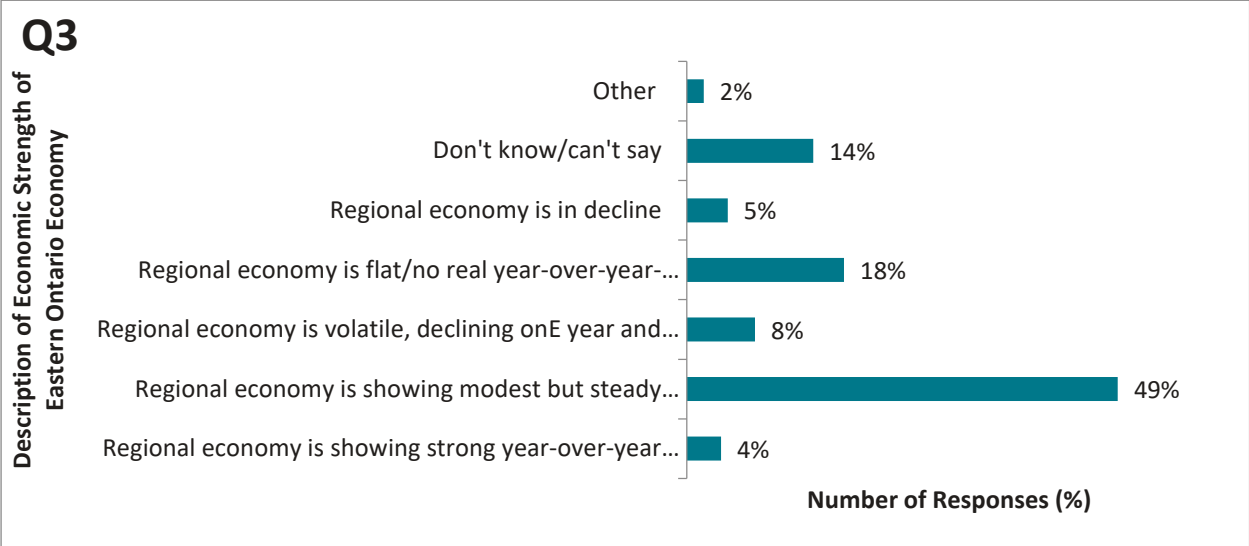


n=255





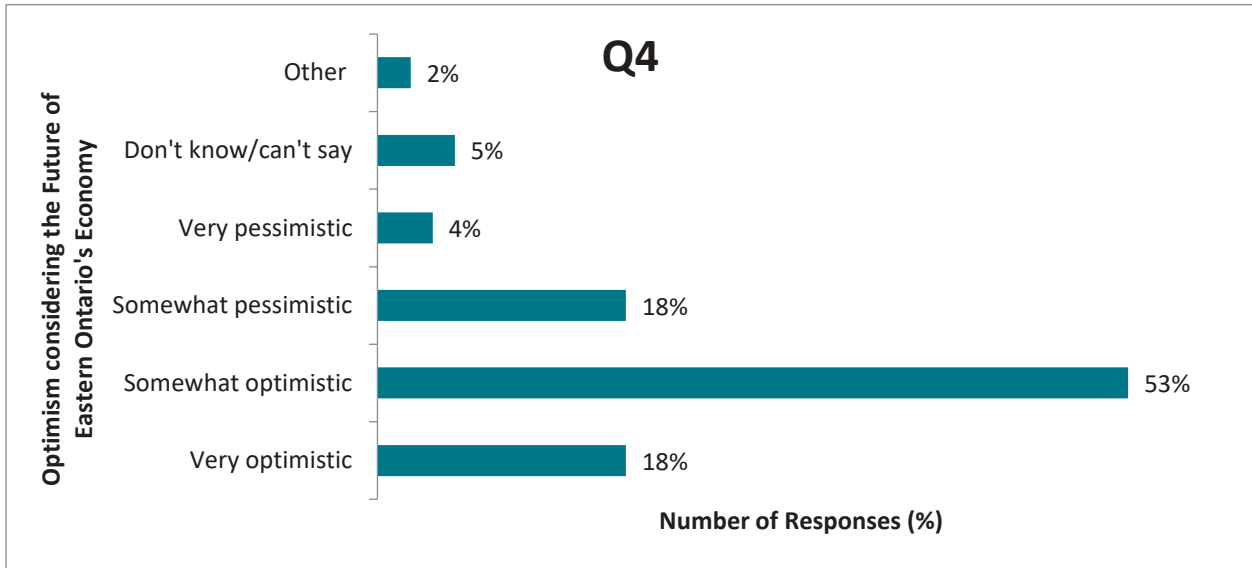
**Q3. How would you describe the ECONOMIC STRENGTH of the EASTERN ONTARIO ECONOMY as a whole?**



n=256



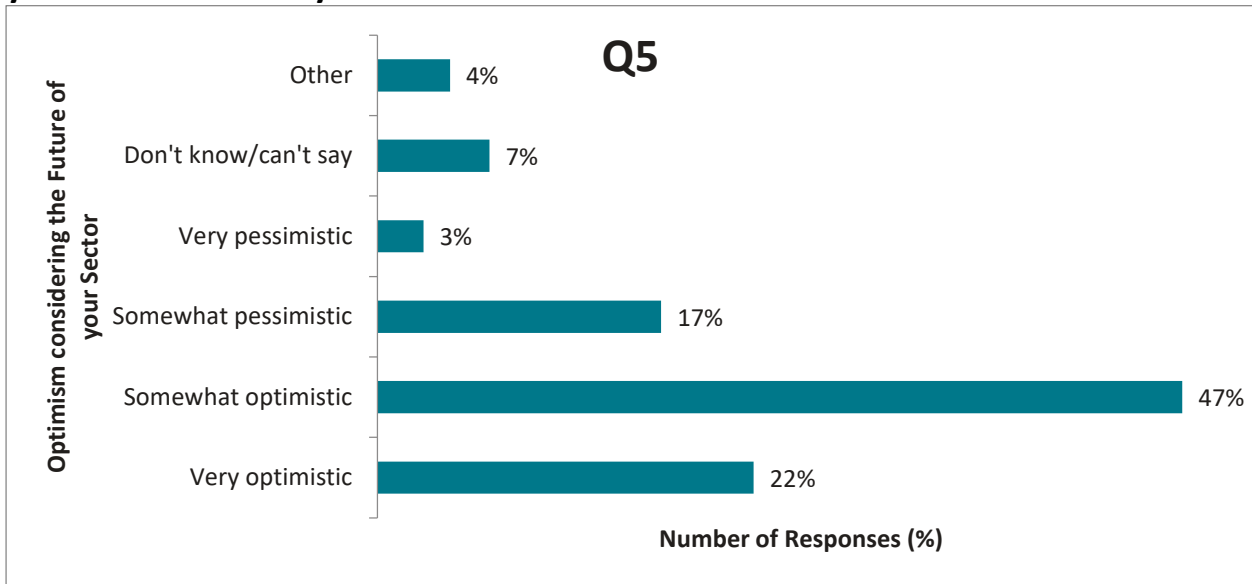
**Q4. How optimistic are you that EASTERN ONTARIO'S ECONOMY will be stronger in the future - the next 3 to 5 years- than it is today?**



n=256



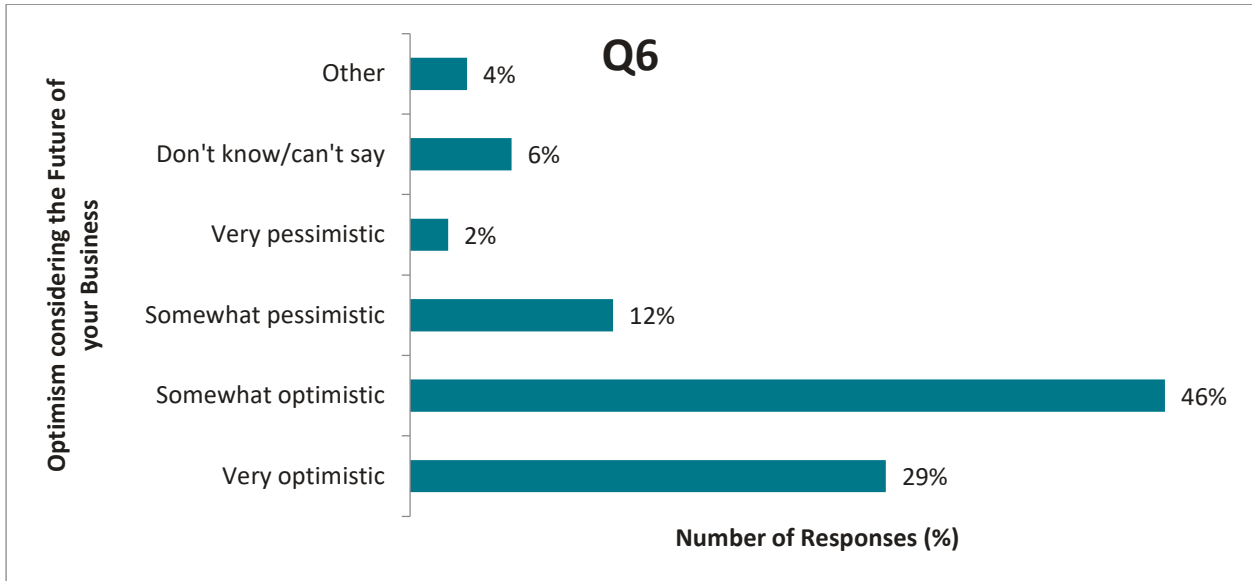
**Q5. How optimistic are you that YOUR SECTOR will be stronger in the next 3 to 5 years than it is today?**



n=257



**Q6. How optimistic are you that YOUR BUSINESS will be stronger in the future --  
--the next 3 to 5 years --- than it is today?**





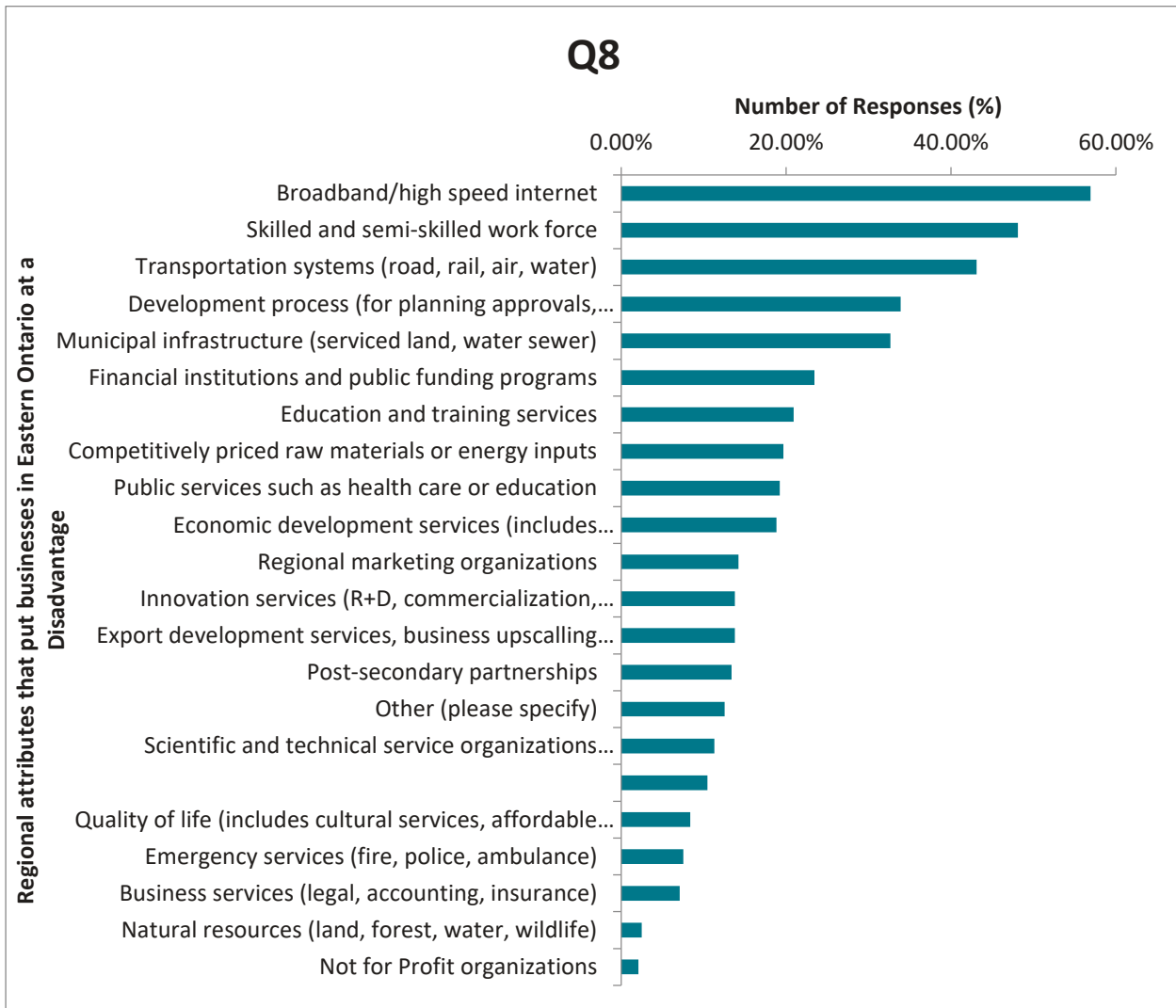
**Q7. Which, if any, of the following REGIONAL ATTRIBUTES do you believe give BUSINESSES in Eastern Ontario an ADVANTAGE in today's marketplace?**



n=252



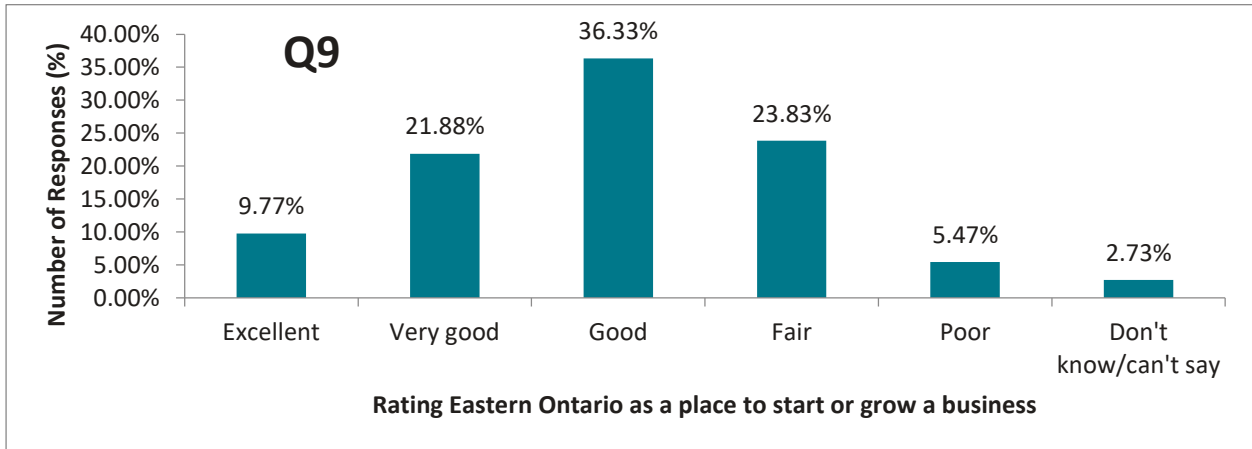
**Q8. Which, if any, of the following REGIONAL ATTRIBUTES do you believe put BUSINESSES in Eastern Ontario at a DISADVANTAGE in today's marketplace?**



n=239



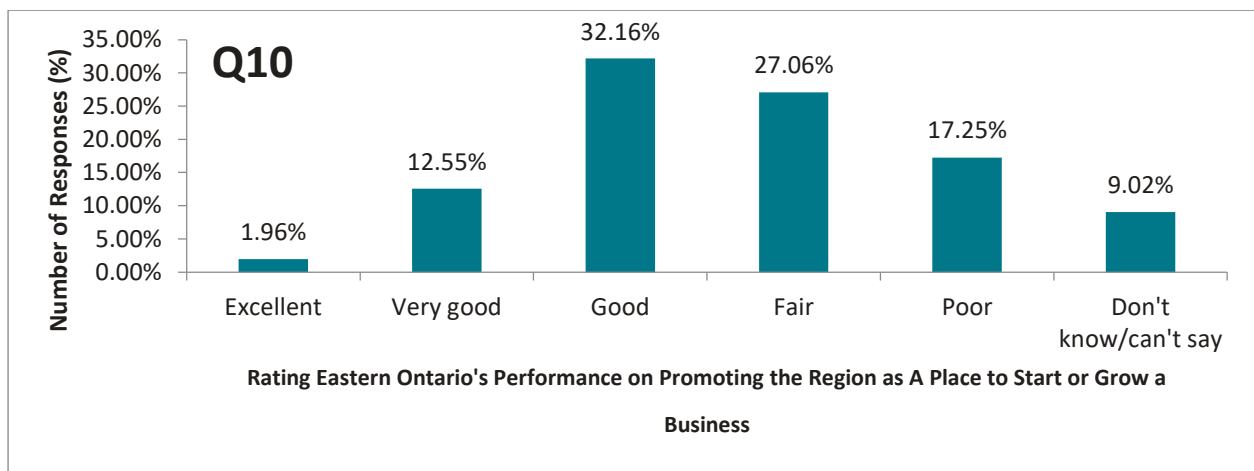
### Q9. How would you RATE Eastern Ontario as a place to START OR GROW a BUSINESS?



n=256



**Q10. How would you RATE Eastern Ontario's performance on PROMOTING the REGION as a place to START OR GROW a BUSINESS?**

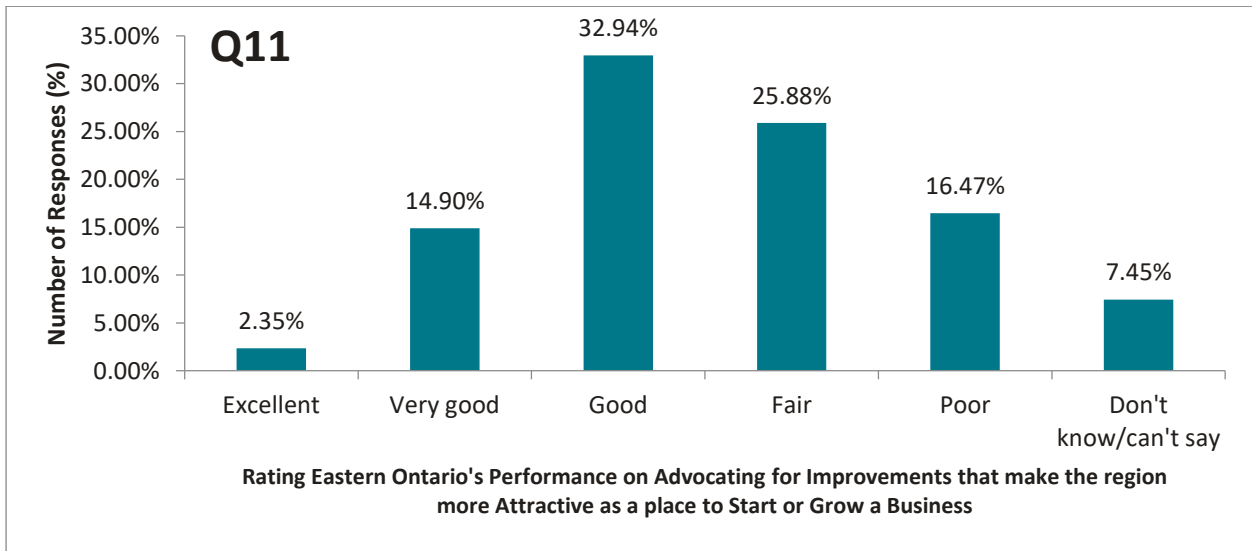


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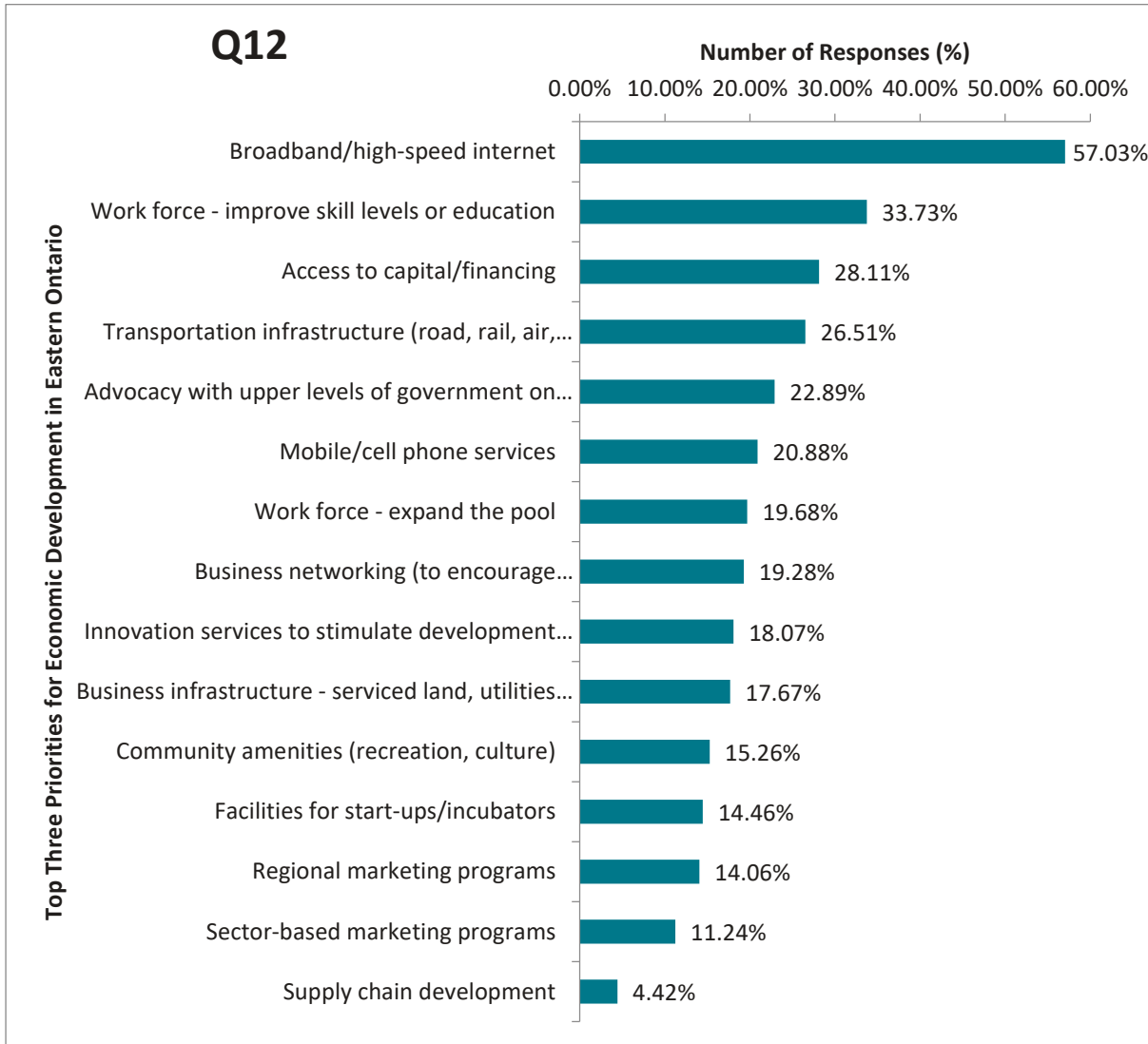
**Q11. How would you RATE Eastern Ontario's performance on ADVOCATING for IMPROVEMENTS that make the region more ATTRACTIVE as a place to START OR GROW a BUSINESS?**



n=255



## Q12. What would be your TOP THREE PRIORITIES for economic development in Eastern Ontario?



n=249



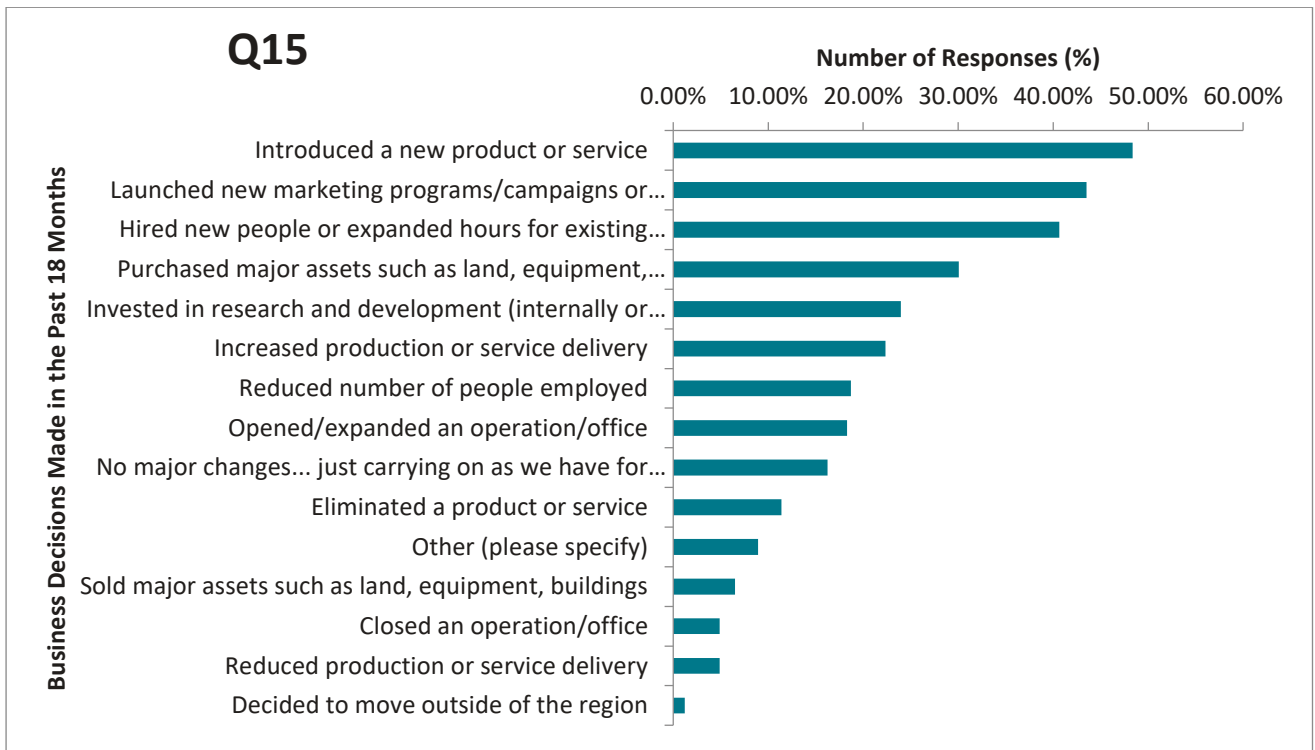
**Q14. Which, if any, of the following WORK FORCE issues are a CONCERN in your BUSINESS or your SECTOR? (For each issue listed, please check one response in each column)**

<b>Answer Choices</b>	<b>Concern in my business</b>	<b>Concern in my sector/industry</b>
Finding workers with skills we need	69	110
Accessing training for existing employees	34	70
Accessing higher education for employees or local labour force	23	73
Accessing workers in the skilled trades	33	101
Finding temporary/short-term workers	51	73
Labour laws and regulations	44	70
Finding workers at competitive wages	48	87
Work force health and safety	26	44
Work force - improve productivity	37	65
Finding workers who are a 'good fit' with our organization	89	91
Strategies to attract immigrants	22	55

n=247



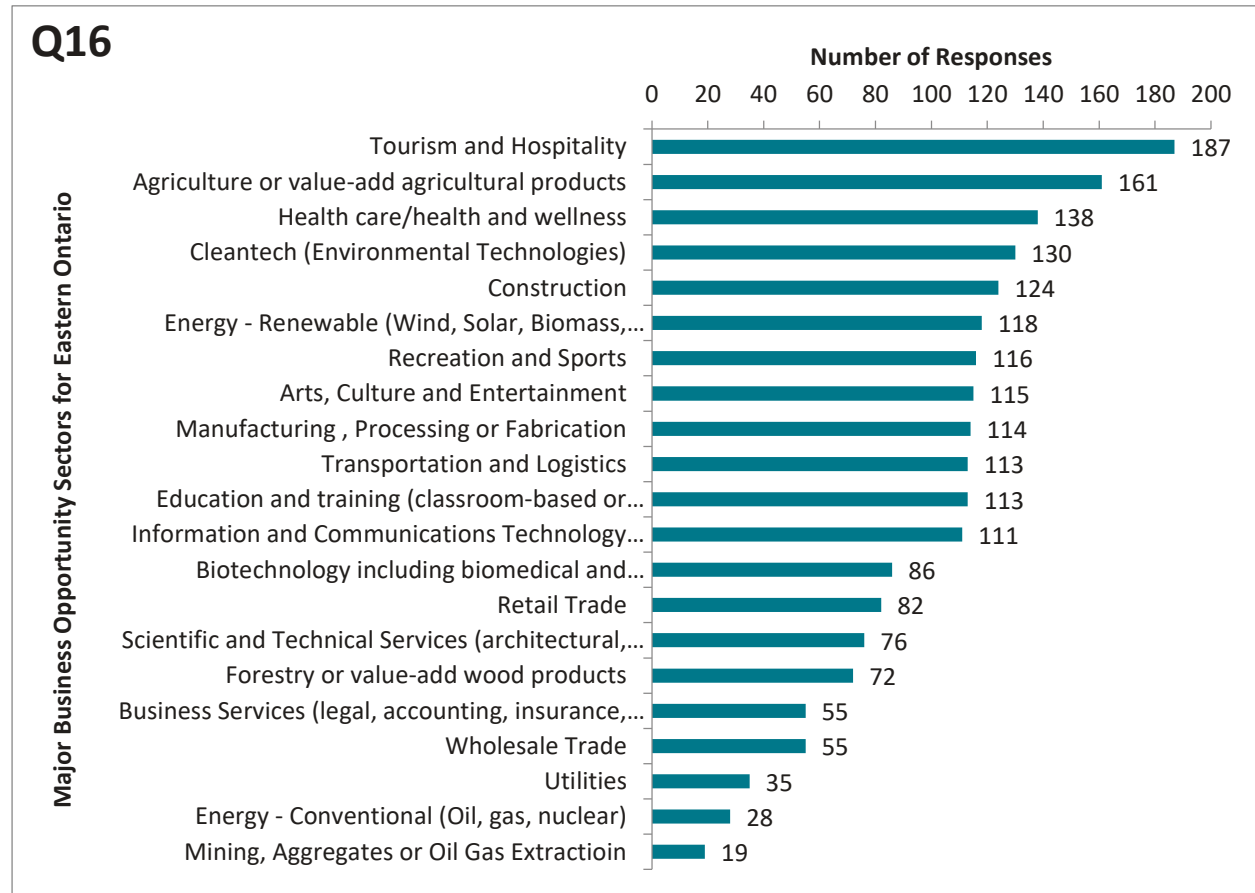
**Q15. Which, if any, of the following DECISIONS have been made in YOUR BUSINESS in the past 18 months?**



n=246

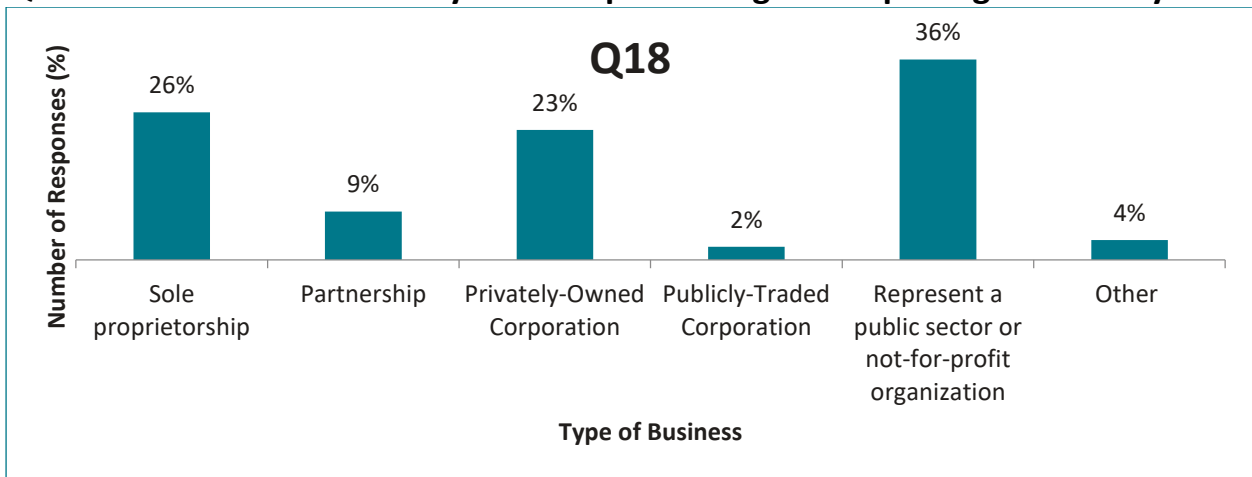


**Q16. Which of the following SECTORS do you see MAJOR BUSINESS OPPORTUNITIES for Eastern Ontario? (Please check one response for each sector listed)**





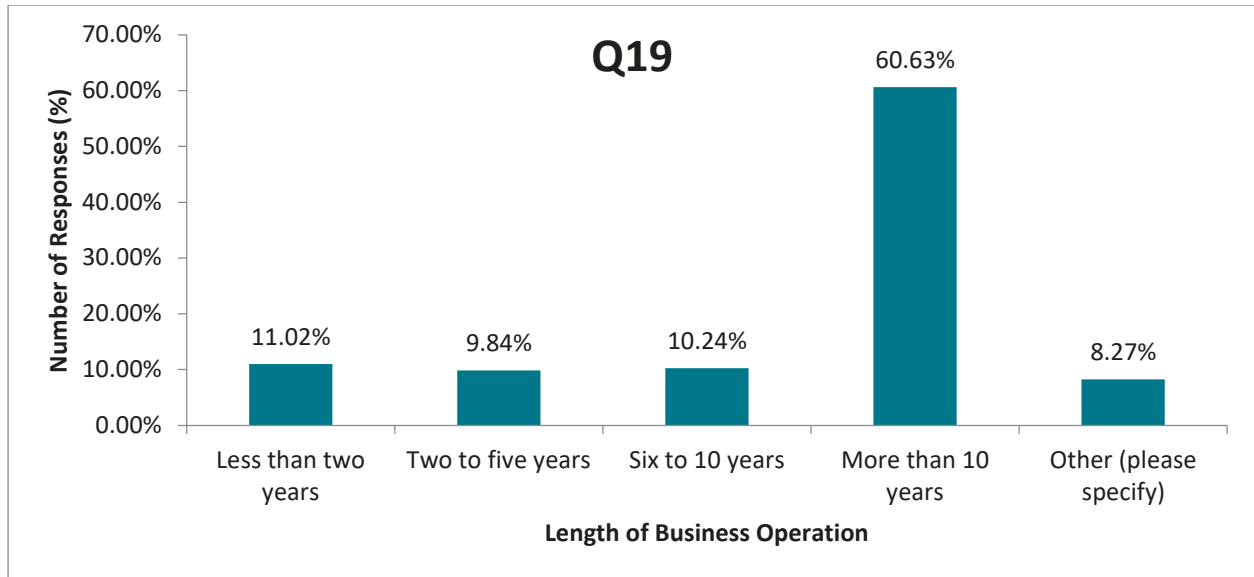
### Q18. What TYPE of business you are representing in completing this survey?



n=254



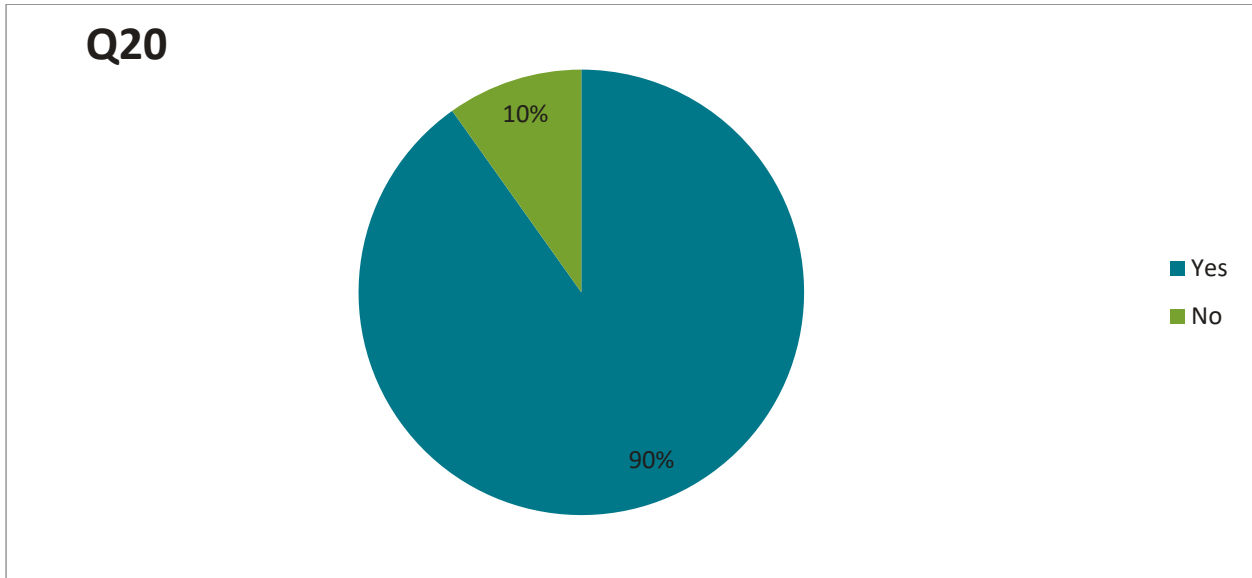
### Q19. How long has your business operated in Eastern Ontario?



n=254



**Q20. Is your BUSINESS LOCATION in Eastern Ontario the HEAD OFFICE of the business?**

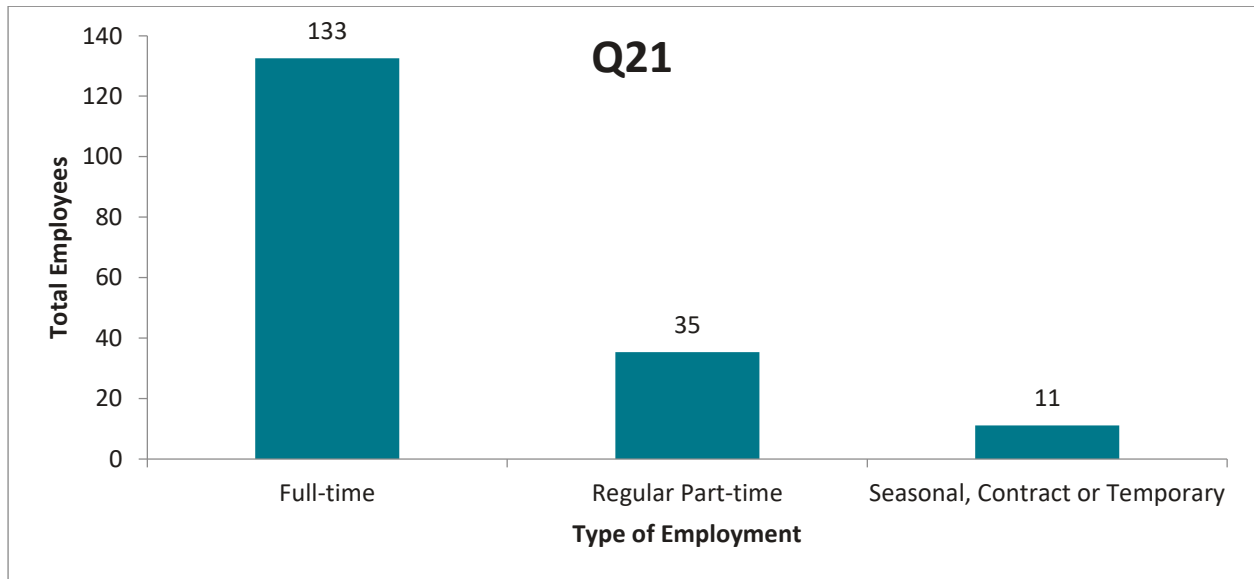


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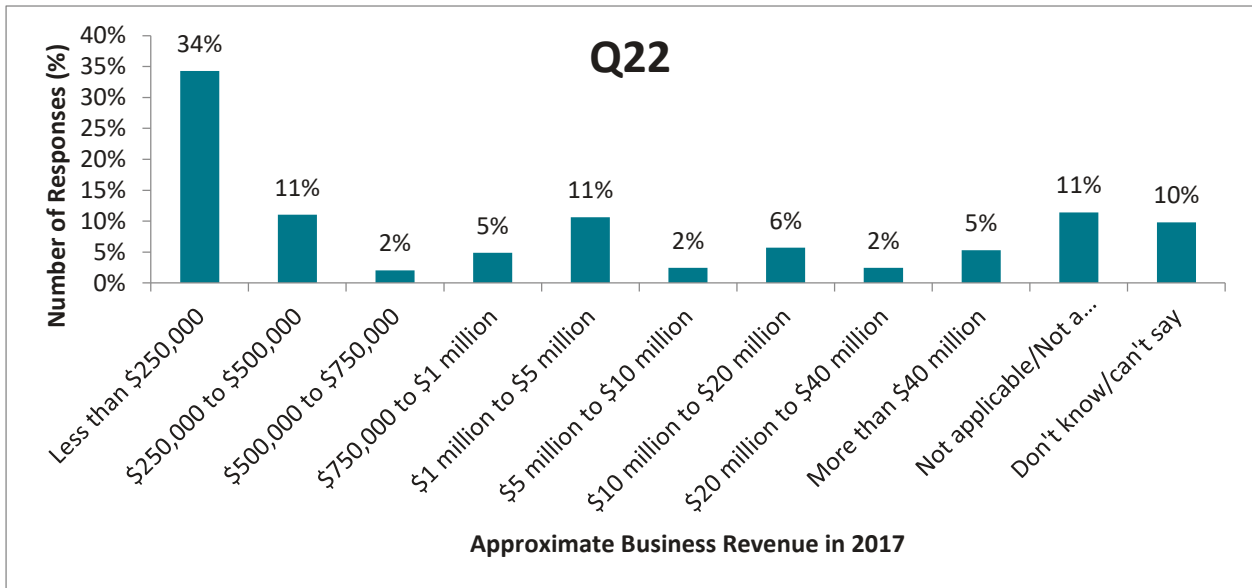
**Q21. What is the total employment in your organization across all Eastern Ontario locations, as of today? (Approximate number is satisfactory; please enter numbers only)**



n=237



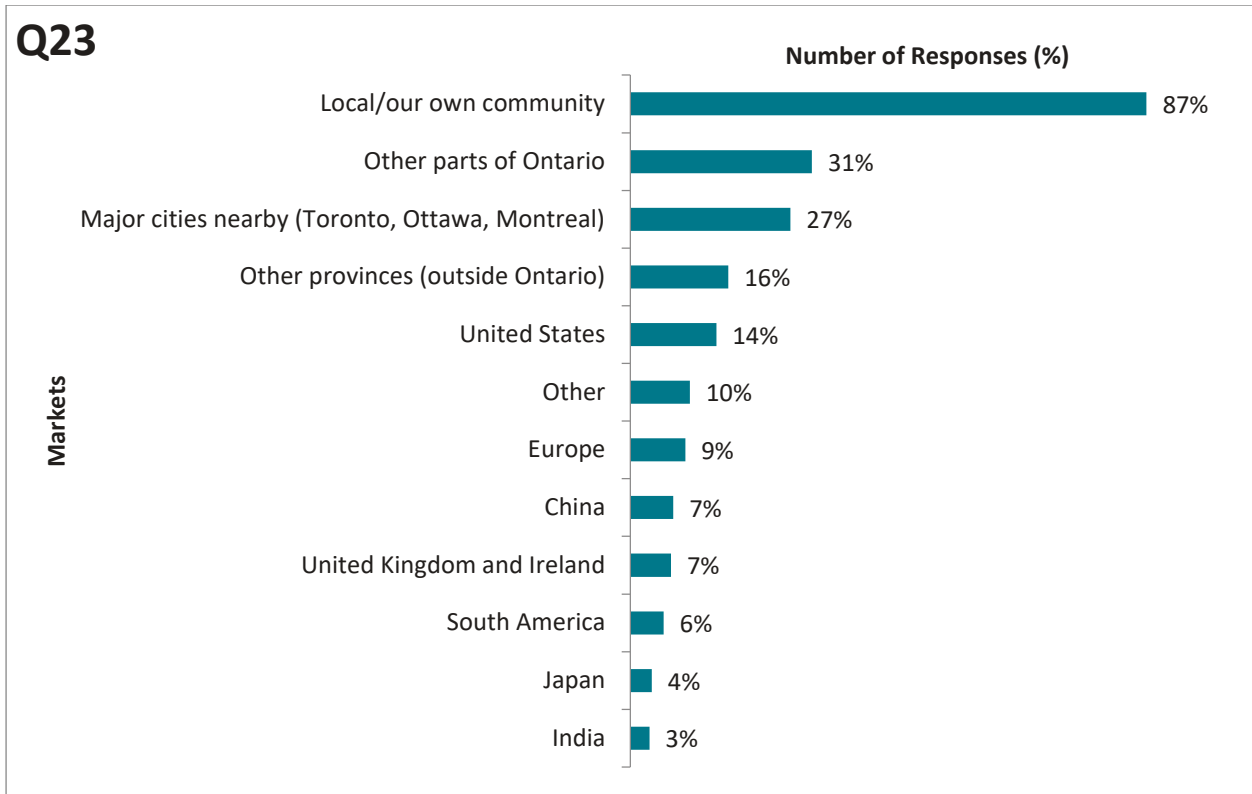
## Q22. What was the approximate revenue for your business in 2017?



n=245



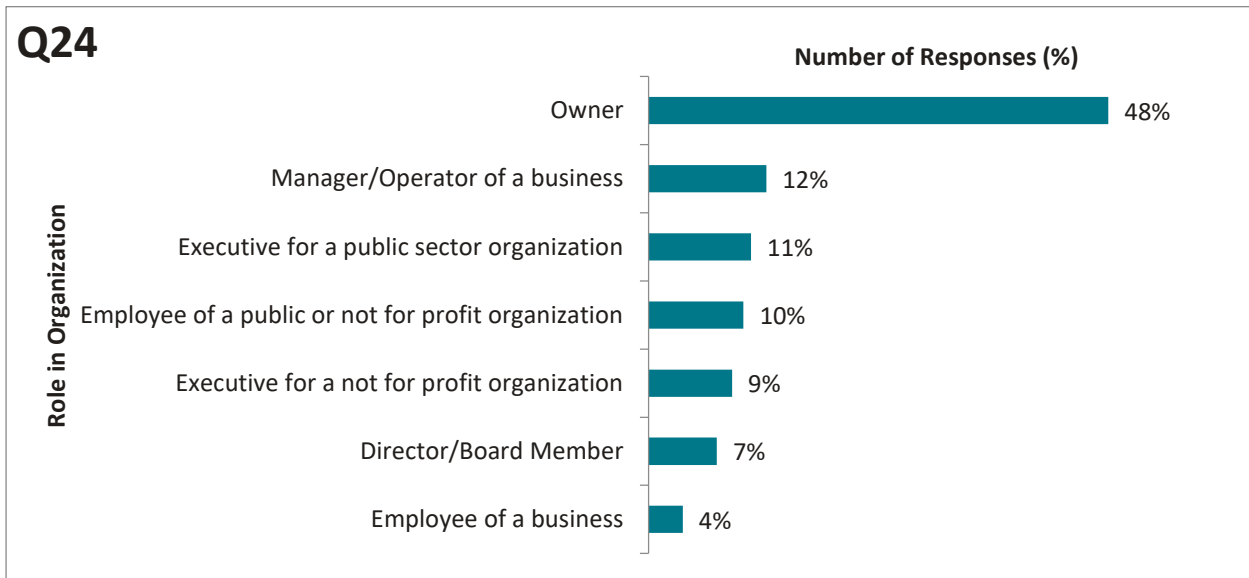
### Q23. Which, if any, of the following markets are you in?



n=249



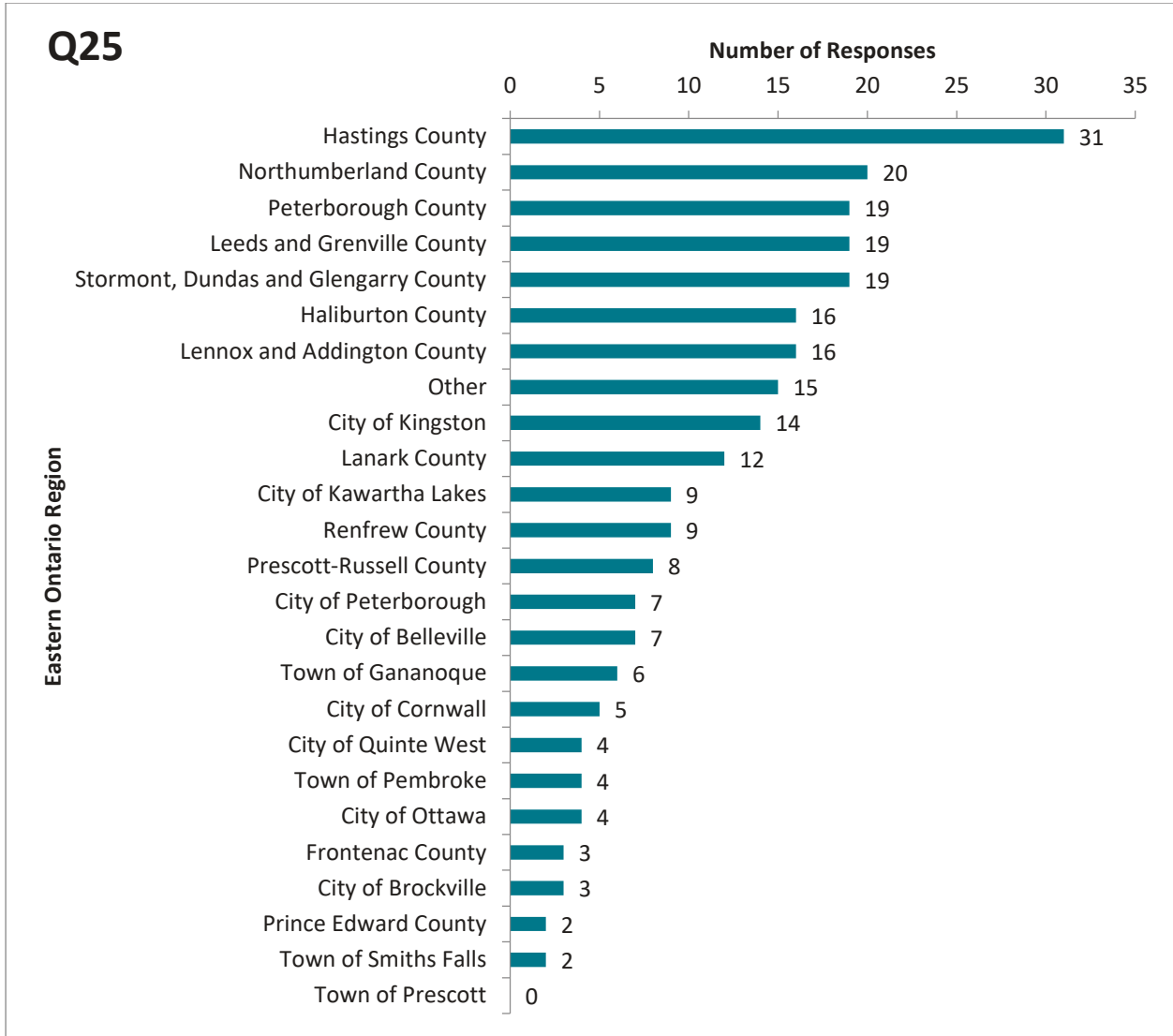
**Q24. What is YOUR ROLE in the organization you are representing? (Please choose just one answer)**



n=253



## Q25. In what PART OF EASTERN ONTARIO is your BUSINESS located?



n=254