National survey on the economic development of official language minority communities:

A summary analysis of national trends

En affaires ensemble

IN BUSINESS TOGETHER

Une initiative conjointe du
RDÉE Canada et de la CEDEC

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EMPLOYMENT AND SOCIAL DEVELOPMENT CANADA

Fonds d'habilitation pour les communautés de langue officielle en situation minoritaire

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LIST OF ACRONYMS

ACFA	Association canadienne-française de l'Alberta
ACO	Alliance culturelle de l'Ontario
AFFC	Alliance des femmes de la Francophonie canadienne
AGAVF	Association des groupes en arts visuels francophones
ANIM	Alliance nationale de l'industrie musicale
APECA	Agence de promotion économique du Canada Atlantique
ATFC	Association des théâtres francophones du Canada
AUFC	Association des universités de la Francophonie canadienne
AFY	Association franco-yukonnaise
BDC	Business Development Bank of Canada
CANNOR	Canadian Northern Economic Development Agency
CCEDN	Canadian Community Economic Development Network
CEDEC	Community Economic Development and Employability Corporation
OLMCs	Official Language Minority Communities
CMC	Cooperatives and Mutuals Canada
CPSC	Conseil provincial des sociétés culturelles
DEC	Développement économique communautaire
WD	Western Economic Diversification Canada
ESDC	Employment and Social Development Canada
FAAFC	Fédération des aînées et aînés francophones du Canada
FCCF	Fédération culturelle canadienne-française
FCFA	Fédération des communautés francophones et acadienne
FEDDEV	Federal Economic Development Agency for Southern Ontario
FEDNOR	Government of Canada's economic development organization for Northern Ontario
FFT	Fédération franco-ténoise
FRIC	Front des réalisateurs indépendants du Canada
ICRML	Institut canadien de recherche sur les minorités linguistiques
MDEIE	Ministère de l'économie, de l'innovation et des exportations du Québec
RDA	Regional development agencies
PME	Petites et moyennes entreprises
QCGN	Quebec Community Groups Network
RCCFC	Réseau des Cégeps et des Collèges Francophones du Canada
CCEDNET	Canadian CED Network
RDÉE CANADA	The Economic Development and employability Network (Réseau de développement économique et d'employabilité)
RECF	Regroupement des éditeurs canadiens-français
RESDAC	Réseau pour le développement de l'alphabétisme et des compétences
SADC	Société d'aide au développement des collectivités
SAIC	Secrétariat aux affaires intergouvernementales canadiennes
SDECB	Société de développement économique de la Colombie-Britannique
TNDGG	Table nationale des directions générales et des gestionnaires (du RDÉE Canada)

EXECUTIVE SUMMARY

The Economic Development and employability Network (RDÉE Canada), the Community Economic Development and Employability Corporation (CEDEC) and their stakeholders support economic development and employability in official language minority communities (OLMCs).

These OLMCs consist of Francophone communities outside Quebec and the English-speaking communities of Quebec. These communities are an indisputable source of economic strength for the economic development of Canadian provinces and territories. However, their contribution to the economic vitality of their environment goes largely unheralded because it is not measured, understood or recognized.

In 2014, RDÉE Canada and CEDEC appointed PGF Consultants to conduct a national survey of the stakeholders involved in the economic development of OLMCs. The survey was aimed at gathering information on perceptions and concrete experiences in OLMCs regarding economic development.

The initial work for the survey was overseen by an advisory committee made up of 17 representatives from organizations and departments with a key role in the development of OLMC economic development (Appendix B).

This document is a synthesis of the national trends identified in the analysis of the data collected in the survey. Prior to this work, PGF Consultants carried out a review of the literature on the results of past research and work done on the municipal, provincial, regional and national levels. The team also reviewed the effectiveness of previous initiatives. Given these various steps, the national survey was conducted with a satisfactory level of knowledge.

The inquiry was carried out using two data collection techniques:

I. Consultations with members of local, regional, provincial and national associations and organizations via questionnaire;

II. Semi-structured individual interviews and focus groups conducted with specific key partners of the community.

More than 1,064 people from OLMCs across the country participated in the national survey, thus creating a varied sample representative of the regions and the different actors involved in the economic development of OLMCs. **The respondents:**

1. Said that all regions, with the exception of Canada's North, have mixed opinions about the work done in recent years to support the economic development of OLMCs. The programs and initiatives are not considered to be effectively meeting the prioritized requirements of businesses and the workforce. In addition, OLMCs believe that neither their businesses, organizations or communities are taking full advantage of the available services and infrastructure.

2. Confirmed the importance, for OLMCs, of being able to benefit from conditions conducive to supporting economic development. In the entrepreneurship component, some of the most important factors identified are the development of business networks, innovation, the quality of products and services and the increased funding for businesses. In the employability component, several things were noted: the importance of strengthening human resources competencies, increasing productivity, reducing costs and improving the onboarding processes for new job entrants.

3. Unanimously verified the key assets conducive to the development of OLMCs: accessibility to a skilled workforce, telecommunications and Internet, the community's business environment, synergy with other businesses or partners, and the community's cultural and social environment.

4. Identified promising sectors for OLMCs: tourism, arts and culture represent such sectors for all regions. The respondents also attached great importance to teaching, health services and the environment, with the exception of Quebec.

5. Identified seven opportunities to take advantage of in order to support the economic development of OLMCs in all regions except Quebec and the three territories. These opportunities include the increased use of social media and online services and adaptation to the changing needs of the aging population. Similarly, attracting young entrepreneurs and workers and developing interest in alternative energy sources are seen as promising opportunities for the development of businesses and communities, except in Quebec.

6. Determined that OLMCs have not focused a great deal on exports, preferring local markets instead in support of community development. Analysis of the preferred markets shows that the regional market is considered the primary source of potential growth for Quebec and Ontario. The Atlantic and Western Regions, for their part, place greater value on the provincial market, whereas the North strongly prefers the local market.

7. Identified two overarching themes: the fundamental requirement for OLMCs to be known and recognized for their contribution to the Canadian economy and to have access to a number of methods and resources to develop the communities and ensure the long-term viability of their organizations and businesses.

The survey achieved its goal of advancing knowledge about what is perceived and experienced by OLMCs in terms of economic development. The collected data have been organized to allow for a variety of potential analyses, on both a national and regional scale, or by type of stakeholder, in order to support the development of initiatives aimed at increasing the economic growth of all OLMCs.

1. INTRODUCTION

1.1. BACKGROUND

The Economic Development and employability Network (RDÉE Canada), the Community Economic Development and Employability Corporation (CEDEC) and their stakeholders support the economic development and employability within official language minority communities (OLMCs).

These OLMCs consist of Francophone communities outside Quebec and of the English-speaking communities of Quebec. These communities are an indisputable source of economic strength for the economic development of Canadian provinces and territories. However, their contribution to the economic vitality of their environment goes largely unheralded because it is not measured, understood or recognized.

In 2014, RDÉE Canada and CEDEC appointed PGF Consultants to conduct a national survey of the stakeholders involved in the economic development of OLMCs. The survey was aimed at gathering information on perceptions and concrete experiences in OLMCs regarding economic development.

It was hoped that this survey would help increase the knowledge on the key aspects that could support the economic development of OLMCs across the country.

1.2. TARGETED OBJECTIVES

The national survey on the economic development of OLMCs is part of an effort to develop a long-term strategy to ensure the successful economic development and prosperity of OLMCs.

The primary goals of the survey were to update the level of knowledge on the reality and the economic contribution of OLMCs to Canada, and to determine the issues and growth opportunities that will affect the capacity to increase OLMC economic performance.

Lastly, the survey was also aimed at creating opportunities for dialogue with the many organizations involved in the development and prosperity of OLMCs.

1.3 THE METHODOLOGICAL APPROACH

Some 1,064 people in OLMCs across the country participated in the survey. Two data-collection techniques were used:

I. Consultations with members of local, regional, provincial and national associations and organizations via questionnaire;
II. Semi-structured individual interviews and focus groups conducted with specific key partners of the community.

The questionnaire consisted of six closed questions and three open questions. The closed questions dealt with:

1. The value placed on the work done to support the economy in OLMCs;
2. The level of importance of the factors conducive to business development;
3. Assets favouring the development of OLMCs;
4. Promising sectors for OLMCs;
5. Trends to capitalize on for the development of OLMCs and businesses;
6. Target markets.

The three open questions dealt with:

1. The priorities of the entrepreneurship support services and programs provided by government agencies, economic development organizations and research and teaching institutions;
2. Factors most successfully favouring the creation and development of businesses in minority situations; and
3. Foreseeable economic development initiatives on the provincial or territorial level, as well as regionally and nationally.

The semi-structured individual interviews and focus groups were conducted with many organizations and institutions (chambers of commerce, federal economic development departments and agencies, social enterprises, federations representing the interests of OLMCs) in order to provide more in-depth information about the preliminary results and findings. Details on the organizations contacted are found in Appendix A.

The initial work for the survey was overseen by an advisory committee made up of 17 members from organizations and departments with a key role in the development of OLMC economic development (Appendix B). They had a critical role in defining the mandate and the methodology used, as well as in developing this summary analysis.

1.4 STAKEHOLDERS

The success of the survey was due in large part to having been able to gather the viewpoints of a varied number of stakeholders involved in OLMC economic development for all of the five national regions identified (Atlantic, Quebec, Ontario, Western, and North).

In addition, the survey was aimed at gathering a greater amount of feedback from individuals, community stakeholders and businesspeople, in order to accurately identify the precise situation faced by OLMCs.

With over 1,064 respondents and a very good regional and sectoral distribution, the survey sample was satisfactory. The breakdown of the 1,064 participants is as follows:

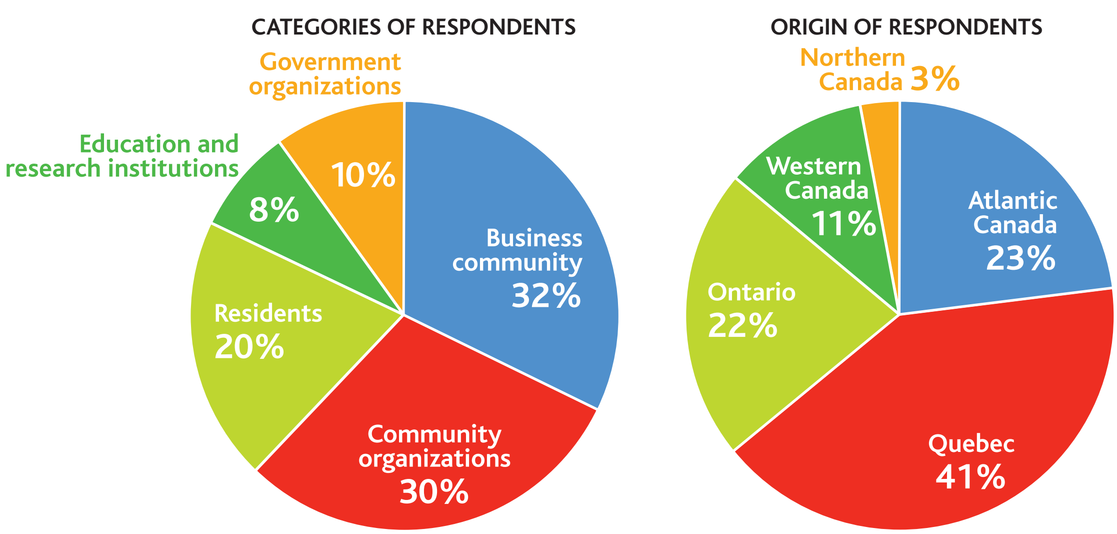
- 339 respondents from the business community such as private businesses, community businesses with social capital, financial institutions, etc.
- 325 respondents from organizations and/or associations working for the economic development of OLMCs including but not limited to the following sectors: culture, youth, education, health, immigration, infrastructure, tourism, municipal, rural, demography and agriculture, etc.
- 215 respondents in the category of OLMC members (individuals).
- 103 respondents from various government levels (municipal, provincial, territorial, regional and federal) as well as government agencies and/or organizations and departments such as Industry Canada, Department of Canadian Heritage, the Business Development Bank of Canada, economic development agencies (APECA, FEDNOR, DEC, FEDDEV, DEO, CANNOR), etc.
- 82 respondents in academic and research institutions including Collège Boréal in Sudbury, the Université de Moncton, HEC Montreal, the University of Ottawa, the Université de Saint-Boniface, Concordia University, Bishop's University and McGill University.

Table 1 illustrates the percentage of each category of respondents according to their business sector and home region

TABLE 1 : RESPONDENT PROFILE

Respondent profile	Atlantic	Quebec	Ontario	Western	North	TOTAL
Business community	75	152	72	31	9	339
Community organizations	79	126	65	44	11	325
Residents	36	95	51	26	7	215
Education and research institutions	25	27	19	10	1	82
Government organizations	32	40	21	9	1	103
Total	**247**	**440**	**228**	**120**	**29**	**1064**

FIGURE 1 : RESPONDENT PROFILE – TYPES OF STAKEHOLDERS AND REGIONAL PROPORTION



2. KEY SERVEY FINDINGS

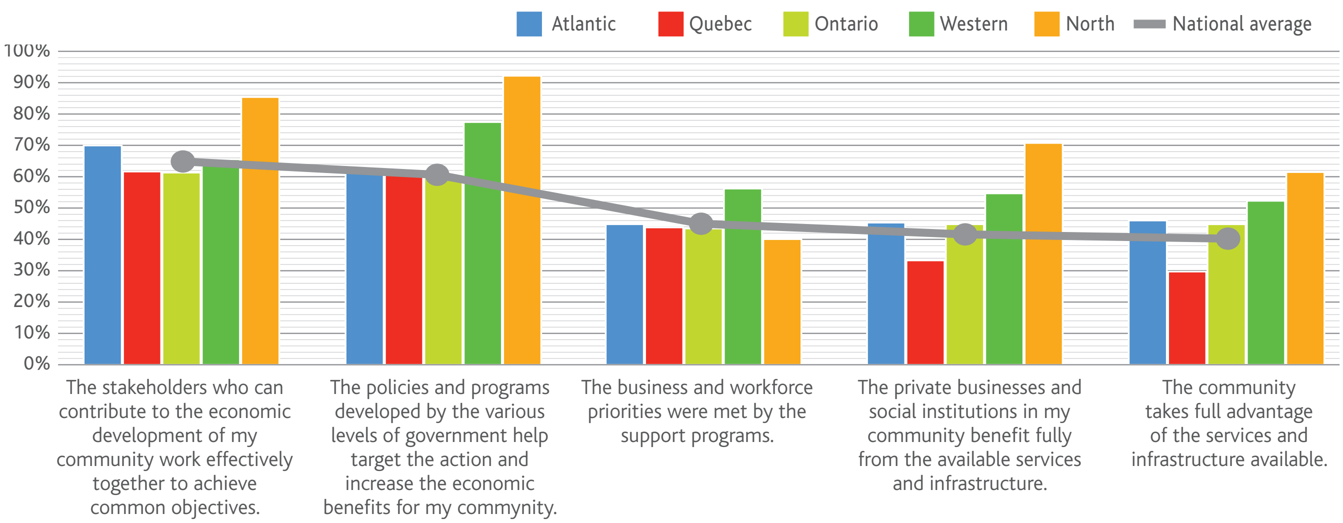
The aim of this document is to provide a summary analysis of the value respondents placed on various aspects contributing to the economic development of OLMCs. The emphasis will be on national findings. When appropriate, differences and regional characteristics are also highlighted.

However, for more information, Appendix C contains a table illustrating the value (in %) per region and Appendix D contains a summary table presenting the average results of the survey by region, respondent type and zone (rural and urban). Those wishing for further information on more specific variants can therefore consult these appendices.

2.1 VALUE PLACED ON GOVERNMENT EFFORTS

The national survey measured the value that the OLMCs placed on the work carried out by the government to support the economic development of their community. Overall, the results indicate a mixed level of value in all regions, with the exception of the North. In contrast with the national trend, the North places a higher value on the effectiveness of the various stakeholders who work in the field of economic development, as well as on the contribution of government policies and programs aimed at increasing economic benefits.

FIGURE 2 : VALUE PLACED ON ECONOMIC SUPPORT EFFORTS



However, the survey tends to demonstrate a national-scale dissatisfaction with the capacity of the programs to meet the prioritized needs of businesses and the workforce and the fact that OLMCs are not taking full advantage of the available services and infrastructure.

What is more, in terms of the questions pertaining to accessibility to services and infrastructure for businesses, organizations and the community, Quebec brought the national average downward with a value of under 35%.

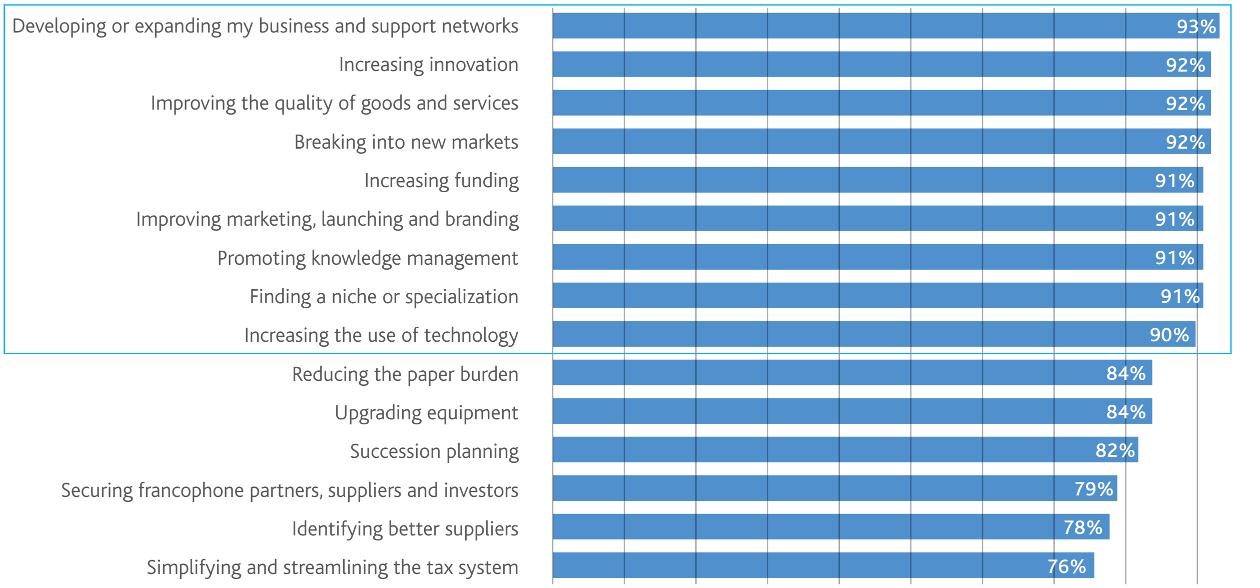
2.2. FACTORS FAVOURING BUSINESS DEVELOPMENT

The second part of the survey proposed a list of factors likely to promote the economic development of OLMCs. The respondents had to identify the level of importance they attached to each of these factors. The goal was to identify the most determining factors. The survey focussed on two components in particular, entrepreneurship and employability.

This table demonstrates the national level of positive value for each of the factors promoting the economic development of businesses. For example, 93% of respondents said that developing and broadening business and support networks was key to business development.

[1] The level of value was calculated by combining the results from the "Somewhat agree" and "Entirely agree" categories. These two categories determine the level of positive value with respect to a given factor.

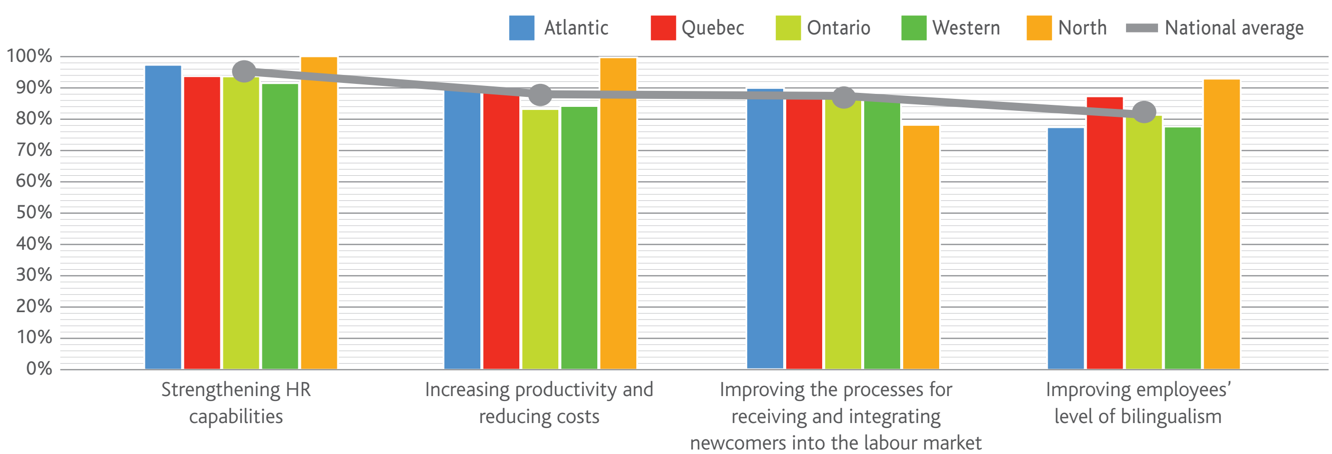
FIGURE 3 : FACTORS PROMOTING BUSINESS DEVELOPMENT – ENTREPRENEURSHIP COMPONENT



With respect to entrepreneurship, a look at the histogram above reveals that, nationally, a large majority of the identified factors exceed the threshold of 90%. Several of the nine most determining factors are the development of business networks, innovation, the quality of products and services, the need to access new markets and the growth of business funding.

The analysis of regional trends (Appendix C) demonstrates that knowledge management is very important for all the regions, but is somewhat less of a priority for the North (79%). Furthermore, in comparison with the other regions, the Atlantic Region seems to place more importance on modernization of equipment (90%) and succession development or business succession (92%).

FIGURE 4 : FACTORS PROMOTING BUSINESS DEVELOPMENT – EMPLOYABILITY COMPONENT

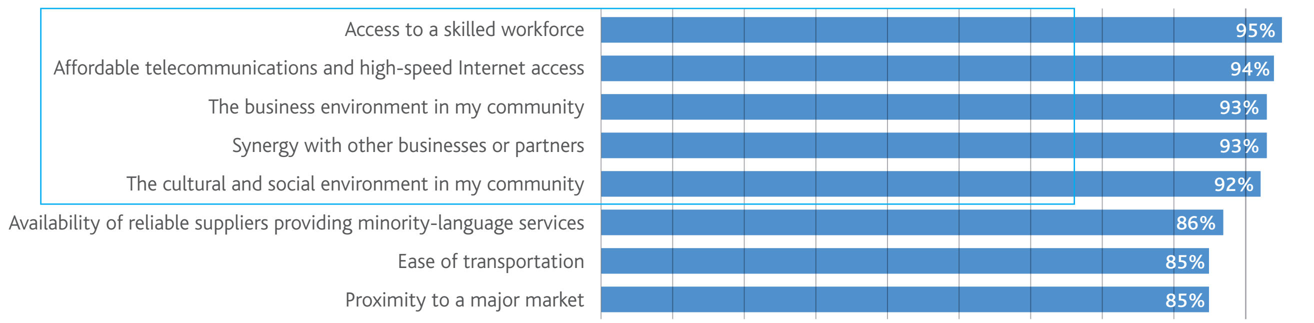


In terms of employability, the analysis confirmed that the four above-identified factors are very important to the economic development of OLMCs. Overall, the survey revealed that it is crucial to strengthen human resources skills, increase productivity, reduce costs and improve the onboarding process for new job entrants. The need to increase the level of staff bilingualism would seem to pertain to Quebec and the North slightly more so than to the other regions.

2.3 ASSETS PROMOTING THE DEVELOPMENT OF OLMCS

The respondents in all regions were unanimous in confirming the conditions perceived as promoting the economic development of OLMCs. The respondents suggested five main assets: accessibility to a skilled workforce, telecommunications and Internet, the community's business environment, synergy with other businesses or partners and the community's cultural and social environment. Accessibility to transport and presence of reliable suppliers offering service in the minority language are two other important assets for all the regions, with the exception of the three territories.

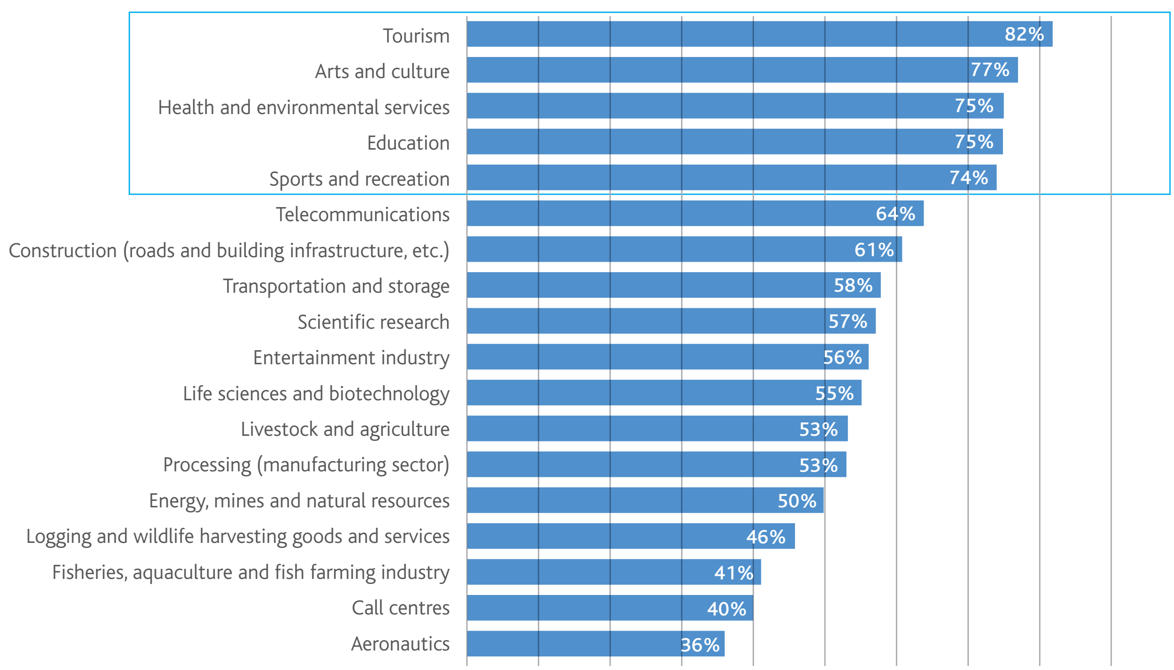
FIGURE 5 : ASSETS PROMOTING THE DEVELOPMENT OF OLMCS



2.4 PROMISING AREAS OF OLMCS

The survey identified which sectors the respondents deemed promising for OLMCs. The results vary considerably from one region to the next. However, tourism and arts and culture are sectors of interest for all regions. The respondents also attached great importance to teaching, health services and the environment, with the exception of Quebec.

FIGURE 6 : PROMISING AREAS OF OLMCS

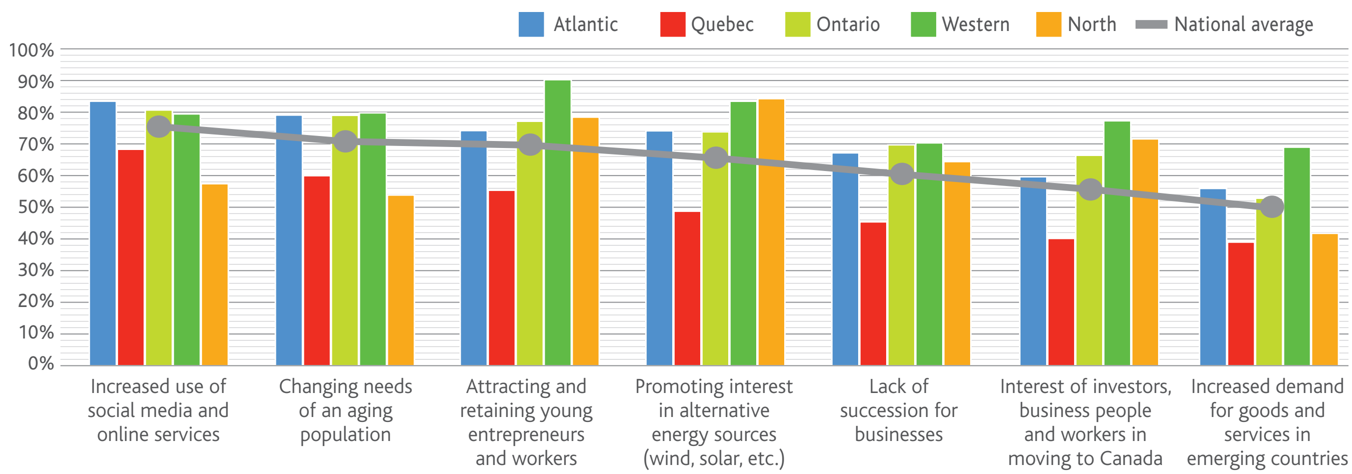


The regional analysis (Appendix C) found that for Ontario and the Western Region, business activities relating to sports and recreation, telecommunications and transport and storage represent the most promising areas while the construction sector seems to hold the most interest for the Western and Northern regions. The Atlantic Region stands out for having a definite, and expected, interest in the fishing industry, aquaculture and fish farming, while for the Western Region, agriculture and the livestock industry were important; finally, in the Northern Region, the mining industry was ranked third-highest among the most promising areas.

2.5 OPPORTUNITIES TO EXPLORE FOR BUSINESSES AND COMMUNITIES

The survey respondents identified seven trends that could be seen as opportunities for supporting the economic development of OLMCs. The increased use of social media and online services and the adaptation to the changing needs of the aging population were presented as opportunities for all regions except Quebec and the three territories. Attracting young entrepreneurs and workers and furthering interest in alternative sources of energy are perceived as trends for business and community development, except in Quebec. The number of investors, entrepreneurs or foreign workers interested in settling in Canada represents a positive opportunity for the Western provinces and the three territories.

FIGURE 7 : OPPORTUNITIES TO EXPLORE FOR BUSINESSES AND COMMUNITIES



2.6 MARKETS OLMCS SHOULD PRIORITIZE

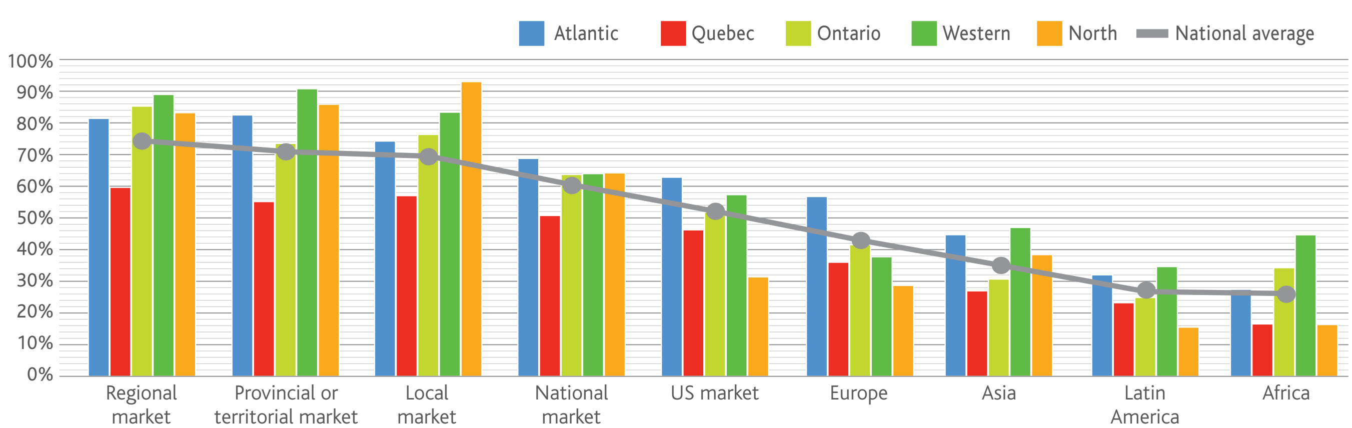
Responses to the survey indicated that OLMCs appear to have developed the reflex – whether conscious or not – to focus more on proximity and on the effect of concentration, to generate economic benefits and advantages for their communities. As the chart below illustrates, the analysis of the national average shows no significant differences between the appeal of regional, local or provincial markets.

However, an analysis of the preferred markets shows that the regional market is considered the primary source of potential growth for Quebec and Ontario. The Atlantic and Western Regions, for their part, place greater value on the provincial market, whereas the North strongly prefers the local market.

According to respondents, external markets do not offer much appeal to OLMCs. There is little interest for the U.S. market in Atlantic Canada and the West. And only the Atlantic region appears to be showing some interest in the European market.

Less traditional overseas markets, such as Latin America and Africa, round out the bottom-ranked regions.

FIGURE 8 : MARKETS PRIORITIZED BY OLMCs



2.7 SUGGESTED INITIATIVES AT THE PROVINCIAL/TERRITORIAL, REGIONAL AND NATIONAL LEVEL

An analysis of the open-ended questions identified possible courses of action that could be initiated at multiple levels (provincial, territorial, regional or national).

The two broad themes that emerged from the responses received were the OLMCs' fundamental need to be known and recognized, and to have access to a number of different means to develop and ensure the sustainability of their organizations and businesses.

The promotion and positioning of OLMCs would appear to be essential conditions. For a number of respondents, Canadians' lack of knowledge of OLMCs and the lack of recognition and attention on the part of public authorities are major obstacles to their development. The comments received show a strong desire to change the current paradigm, which is costly in terms of both time and resources, and which consists of constantly having to prove the existence of OLMCs.

The respondents felt that in order to develop and thrive, OLMCs need to be able to count on a number of means and conditions. Among the main suggestions that were received, we found:

- The development of human potential through training and improving knowledge transfer mechanisms such as coaching and mentoring;
- Increased co-operation and collaboration among OLMC organizations and businesses;
- The importance of developing strategies to attract, integrate and retain people who have an entrepreneurial spirit, people in whom everyone could see themselves, even disadvantaged groups such as women and ethnocultural communities;
- The promotion and access to funding opportunities and targeted programs to help start businesses, purchase equipment, and grow businesses that will remain in OLMCs for generations;
- Access to and modernization of key infrastructures for the development of regional industries.

3. CONCLUSION

Survey respondents:

1. Said that all regions, with the exception of Canada's North, have mixed opinions about the work done in recent years to support the economic development of OLMCs. The programs and initiatives are not considered to be effectively meeting the prioritized requirements of businesses and the workforce. In addition, OLMCs believe that neither their businesses, organizations or communities are taking full advantage of the available services and infrastructure.

2. Confirmed the importance, for OLMCs, of being able to benefit from conditions conducive to supporting economic development. In the entrepreneurship component, some of the most important factors identified are the development of business networks, innovation, the quality of products and services and the increased funding for businesses. In the employability component, several things were noted: the importance of strengthening human resources competencies, increasing productivity, reducing costs and improving the onboarding processes for new job entrants.

3. Unanimously verified the key assets conducive to the development of OLMCs: accessibility to a skilled workforce, telecommunications and Internet, the community's business environment, synergy with other businesses or partners, and the community's cultural and social environment.

4. Identified promising sectors for OLMCs: tourism, arts and culture represent such sectors for all regions. The respondents also attached great importance to teaching, health services and the environment, with the exception of Quebec.

5. Identified seven opportunities to take advantage of in order to support the economic development of OLMCs in all regions excepting Quebec and the three territories. These opportunities include the increased use of social media and online services and adaptation to the changing needs of the aging population. Similarly, attracting young entrepreneurs and workers and developing interest in alternative energy sources are seen as promising opportunities for the development of businesses and communities, except in Quebec.

6. Determined that OLMCs have not focused a great deal on exports, preferring local markets instead in support of community development. Analysis of the preferred markets shows that the regional market is considered the primary source of potential growth for Quebec and Ontario. The Atlantic and Western Regions, for their part, place greater value on the provincial market, whereas the North strongly prefers the local market.

7. Identified two overarching themes: the fundamental requirement for OLMCs to be known and recognized for their contribution to the Canadian economy and to have access to a number of methods and resources to develop the communities and ensure the long-term viability of their organizations and businesses.

APPENDIX A

SUMMARY TABLE OF ORGANIZATIONS CONSULTED AND MEANS OF CONSULTATION

	Target groups	Organisaztions consulted	Means of consultation
1	Business community	339 respondents	• Online survey
2	Organizations / associations working for economic develop-ment	325 respondents from the Chambers of Commerce of Montreal, SADC, TNDGG, SDECB, AFY, ACFA, FFT, RCCFC, AFFC, AUFC, RCCFC, FCFA, RESDAC, FAAFC, Place aux jeunes, FCCF, ANIM, ATFC, CPSC, AGAVF, ACO, FRIC, RECF, CMC, CCEDN (360 members)	• Online survey • Discussion groups and interviews
3	Citizens in OLMCs	215 respondents	• Online survey
4	Government Organizations	103 respondents from Industry Canada, Canadian Heritage, Economic development agencies (ACOA, FEDNOR, CED, FEDDEV, WD, CANNOR), ESDC, BDC, MDEIE and SAIC	• Advisory Committee meetings • Online survey • Telephone Interviews
5	Educational and research insti-tutions	82 respondents from Boreal College in Sudbury, University of Moncton, HEC Montreal, University of Ottawa, Université de Saint-Boniface, Concordia University, Bishop's University, McGill University	• Online survey • Discussion groups
6	Organizations representing OLMCs	• Canadian Francophone organizations that participated in the Leaders Forum • QCGN, Regional Associations, Sector Associations • Participants in the 2012 Pan-Canadian Forum	• Online survey • Discussions during Leaders Forum and Board of Directors meetings
7	RDÉE Canada and CEDEC	• RDÉE Canada Board of Directors • CEDEC Board of Directors • RDÉE Canada member organizations • CEDEC and its stakeholders	• Discussions • Discussion groups and telephone consultations • Online survey

APPENDIX B

ADVISORY COMMITTEE MEMBERS

Partners

- Jocelyne Lalonde, Association des universités de la Francophonie canadienne
- Michaël Béland, Cooperatives and Mutuals Canada
- Catherine Beauchamps, Canadian Tourism Commission

Government Representatives

- Yvan Déry, Canadian Heritage
- Linda Garand, Industry Canada
- Ghislaine Savoie, Atlantic Canada Opportunities Agency
- Denise Gareau, Employment and Social Development Canada (Enabling Fund)
- Yves St-Germain, Citizenship and Immigration Canada
- Sylvain Giguère, Office of the Commissioner of Official Languages

Representatives of RDÉE Canada Member Organizations and CEDEC

- Patrice Gauthier, Conseil de développement économique de l'Alberta (CDÉA)
- Anne-Christine Boudreau, Conseil de développpement économique des Territoires du Nord-Ouest (CDÉTNO)
- Daniel Sigouin, RDÉE Ontario
- Johanne Lévesque, RDÉE New Brunswick
- Denis Laframboise, RDÉE Canada Board of Directors
- Michael Toye, CEDEC Board of Directors
- John Buck, CEDEC
- Jean Léger, RDÉE Canada
- Michael Toye, CEDEC Board of Directors

APPENDIX C

SUMMARY TABLE OF OVERALL LEVEL OF POSITIVE APPRECIATION

In this report, we have used the data compiled in the table below to gauge the respondents' level of appreciation and identify any national patterns.

Initially, respondents to the online survey were invited to indicate their level of appreciation for each of the statements proposed based on the following scale:

Level of appreciation of statements

NEGATIVE MIXED POSITIVE

To obtain a more comprehensive indication of respondents' level of appreciation and to facilitate the representation of results, we have combined the data from the "Somewhat agree" and "Strongly agree" categories in order to determine the level of positive appreciation of a given factor. We are calling this new category "overall level of appreciation."

	STATEMENT ASSESSMENTS					
A. NEEDS AND PRIORITIES	**Atlantic**	**Quebec**	**Ontario**	**Western**	**Northern**	**National**
1. Assessment of results						
The stakeholders who can contribute to the economic development of my community work effectively together to achieve common objectives.	70%	62%	62%	66%	86%	65%
The policies and programs developed by the various levels of government help target the action and increase the economic benefits for my community.	63%	53%	61%	78%	92%	61%
The business and workforce priorities were met by the support programs.	45%	44%	43%	56%	40%	45%
The private businesses and social institutions in my community benefit fully from the available services and infrastructure.	46%	34%	45%	55%	70%	42%
The community takes full advantage of the services and infrastructure available.	46%	30%	45%	52%	62%	41%
2. Factors driving business development - entrepreneurship						
Developing or expanding my business and support networks	95%	94%	93%	91%	77%	93%
Increasing innovation	97%	89%	93%	94%	86%	92%
Improving the quality of goods and services	96%	91%	91%	89%	86%	92%
Breaking into new markets	96%	89%	93%	88%	85%	92%
Increasing funding	94%	92%	91%	88%	79%	91%
Improving marketing, launching and branding	94%	93%	88%	87%	71%	91%
Promoting knowledge management	92%	90%	92%	90%	79%	91%
Finding a niche or specialization	96%	89%	90%	87%	71%	91%
Increasing the use of technology	95%	89%	89%	86%	71%	90%
Reducing the paper burden	84%	88%	83%	77%	71%	84%
Upgrading equipment	90%	79%	88%	83%	75%	84%
Succession planning	92%	72%	86%	81%	85%	82%
Securing Francophone partners, suppliers and investors	77%	79%	81%	76%	77%	79%
Identifying better suppliers	81%	76%	80%	76%	69%	78%
Simplifying and streamlining the tax system	83%	76%	70%	72%	62%	76%
2.1 Factors driving business development - employability						
Strengthening HR capabilities	98%	94%	95%	92%	100%	95%
Increasing productivity and reducing costs	90%	89%	83%	85%	100%	88%
Improving the processes for receiving and integrating newcomers into the labour market	90%	86%	88%	88%	79%	88%
Improving employees' level of bilingualism	78%	88%	82%	78%	93%	83%

B. OPPORTUNITIES	STATEMENT ASSESSMENT					
	Atlantic	Quebec	Ontario	Western	Northern	National
3. Assets for community development						
Access to a skilled workforce	99%	93%	96%	95%	93%	95%
Affordable telecommunications and high-speed Internet access	97%	93%	95%	94%	79%	94%
The business environment in my community	96%	93%	92%	90%	79%	93%
Synergy with other businesses or partners	95%	92%	92%	92%	93%	93%
The cultural and social environment in my community	94%	93%	91%	92%	86%	92%
Availability of reliable suppliers providing minority-language services	87%	87%	88%	78%	71%	86%
Ease of transportation	90%	84%	86%	82%	64%	85%
Proximity to a major market	86%	82%	87%	89%	79%	85%
4. Promising sectors						
Tourism	89%	77%	81%	81%	92%	82%
Arts and culture	78%	76%	75%	77%	79%	77%
Health and environmental services	74%	67%	86%	86%	71%	75%
Education	73%	67%	85%	88%	71%	75%
Sports and recreation	74%	71%	80%	79%	57%	74%
Telecommunications	61%	57%	76%	76%	69%	64%
Contruction (roads and building infrastructure, etc.)	62%	48%	72%	84%	86%	61%
Transportation and storage	55%	43%	78%	78%	64%	58%
Scientific research	61%	50%	58%	68%	62%	57%
Entertainment industry	57%	48%	67%	66%	50%	56%
Life sciences and biotechnology	56%	50%	60%	70%	25%	55%
Livestock and agriculture	54%	41%	63%	80%	8%	53%
Processing (manufacturing sector)	61%	37%	67%	66%	8%	53%
Energy, mines and natural resources	53%	32%	58%	77%	86%	50%
Logging and wildlife harvesting goods and services	60%	32%	52%	50%	9%	46%
Fisheries, aquaculture and fish farming industry	72%	23%	28%	30%	62%	41%
Call centres	39%	33%	60%	34%	18%	40%
Aeronautics	29%	35%	47%	43%	17%	36%
5. Other opportunities						
Increased use of social media and online services	84%	68%	81%	80%	57%	76%
Changing needs of an aging population	79%	60%	79%	80%	54%	71%
Attracting and retaining young entrepreneurs and workers	74%	55%	77%	90%	79%	69%
Promoting interest in alternative energy sources (wind, solar, etc.)	74%	49%	73%	84%	85%	66%
Lack of succession for businesses	67%	46%	69%	71%	64%	60%
Interest of investors, business people and workers in moving to Canada	60%	40%	66%	77%	71%	56%
Increased demand for goods and services in emerging countries	56%	39%	53%	68%	42%	50%
6. Sources of growth						
Regional market	81%	59%	85%	89%	83%	74%
Provincial or territorial market	82%	55%	74%	91%	86%	71%
Local market	74%	57%	76%	83%	93%	69%
National market	69%	51%	64%	64%	64%	60%
US market	63%	46%	51%	57%	31%	53%
Europe	57%	36%	42%	38%	29%	43%
Asia	45%	27%	31%	47%	38%	36%
Latin America	32%	23%	25%	34%	15%	27%
Africa	28%	16%	34%	45%	17%	26%

APPENDIX D: SUMMARY TABLE OF SURVEY RESULTS

The summary table below shows the average results obtained according to region, type respondent and type of living area.

Thus, using the following scale :

1 = Strongly disagree ;

2 = Somewhat dissagree;

3 = Somewhat agree;

4 = Strongly agree.

an average was calculated to facilitate presenting the results according to the aforementioned categories.

The results are to be interpreted as follows :

Where the average value ranges between 1 and 1.99, the respondents' appreciation of the statement is considered to be low;

Where the average value ranges between 2 and 2.99, the respondents' appreciation of the statement is considered to be medium;

Where the average value ranges between 3 and 4, the respondents' appreciation of the statement is considered to be high.

Presenting the results in this manner allows for refining the analyses with data that better reflects the complexity on the ground. This data could be very useful in developing targeted strategies.

BC: Business community | CO: Community organizations | Res: Residents | ERI: Education and research institutions | GO: Government organizations
RA: Rural area | UA: Urban area | A: Average | R: Total number of respondents

	NAT.		ATLANTIC CANADA											
CPED for OLMC			BC		CO		Res		ERI		GO			
Promising sectors	A	R	RA	UA	RA	UA	RA	UA	RA	UA	RA	UA	A	R
1. Assessment of results	*There appears to be considerable room for improving policy and program effectiveness. Government organizations seem more optimistic in most regions.*													
The stakeholders who can contribute to the economic development of my community work effectively together to achieve common objectives.	2.76	612	2.95	2.56	2.88	2.79	2.60	2.33	2.73	2.83	3.19	3.00	2.85	168
The policies and programs developed by the various levels of government help target the action and increase the economic benefits for my community.	2.64	600	2.79	2.78	2.66	3.00	2.80	2.33	2.43	2.33	2.69	2.57	2.70	166
The business and workforce priorities were met by the support programs.	2.43	562	2.46	2.33	2.34	2.55	2.67	2.33	2.62	1.83	2.93	2.50	2.46	156
The private businesses and social institutions in my community benefit fully from the available services and infrastructure.	2.39	576	2.57	2.33	2.39	2.45	2.50	2.33	2.64	2.40	2.71	2.29	2.48	158
The community takes full advantage of the services and infrastructure available.	2.35	590	2.42	2.25	2.46	2.50	2.22	2.33	2.50	2.33	2.50	2.88	2.44	161
2. Factors driving business development	*All of these factors are important for all stakeholders, in all the regions.*													
Strengthening HR capabilities	3.63	609	3.57	3.79	3.68	3.62	3.60	3.33	3.87	3.83	4.00	3.86	3.71	167
Breaking into new markets	3.56	593	3.53	3.53	3.70	3.62	3.80	3.67	3.79	3.83	3.80	3.75	3.66	164
Increasing funding	3.55	595	3.53	3.41	3.68	3.92	3.60	3.67	3.60	3.67	3.69	3.50	3.62	162
Improving the quality of goods and services	3.54	597	3.62	3.67	3.68	3.23	3.90	3.33	3.79	4.00	3.80	3.38	3.65	164
Increasing innovation	3.54	603	3.54	3.78	3.75	3.50	3.90	3.67	3.93	4.00	3.47	3.50	3.68	163
Improving marketing, launching and branding	3.53	595	3.54	3.63	3.65	3.46	3.70	3.33	3.62	3.80	3.73	3.63	3.61	165
Developing or expanding my business and support networks	3.52	584	3.42	3.24	3.54	3.46	3.70	3.67	3.77	3.40	3.40	3.88	3.50	161
Increasing productivity and reducing costs	3.44	583	3.58	3.44	3.55	3.50	3.40	3.67	3.93	3.67	3.38	3.29	3.54	164
Finding a niche or specialization	3.44	595	3.53	3.56	3.54	3.46	3.30	3.00	3.77	4.00	3.53	3.38	3.53	163
Hiring program	3.42	608	3.33	3.44	3.35	3.42	3.40	3.67	3.47	3.50	3.31	3.14	3.37	166
Increasing the use of technology	3.42	598	3.56	3.67	3.46	3.62	3.90	3.33	3.67	3.67	3.20	3.50	3.55	165
Promoting knowledge management	3.42	597	3.20	3.61	3.48	3.29	3.50	3.33	3.53	3.83	3.56	3.38	3.44	165
Improving the processes for receiving and integrating newcomers into the labour market	3.41	601	3.11	3.29	3.55	3.57	3.70	3.67	3.46	3.67	3.40	3.75	3.43	163
Improving employees' level of bilingualism	3.35	609	2.95	3.16	3.32	3.21	3.90	3.67	3.50	3.00	3.13	2.57	3.20	167
Succession planning	3.30	572	3.31	3.38	3.75	3.54	3.70	3.00	3.87	3.50	3.73	3.50	3.57	162
Upgrading equipment	3.23	574	3.32	3.06	3.27	3.25	3.80	3.67	3.43	3.75	3.27	3.63	3.34	162
Securing Francophone partners, suppliers and investors	3.23	585	3.06	3.11	3.27	3.36	3.40	3.00	3.43	3.33	2.94	3.50	3.21	164
Simplifying and streamlining the tax system	3.14	579	3.15	3.16	3.20	3.30	3.30	3.33	3.46	2.83	3.14	3.17	3.20	160
Identifying better suppliers	3.10	550	3.21	3.17	3.16	3.00	3.22	3.00	3.23	3.25	3.07	3.00	3.15	155

	QUEBEC												ONTARIO											
CPED for OLMC	BC		CO		Res		ERI		GO				BC		CO		Res		ERI		GO			
Promising sectors	RA	UA	RA	UA	RA	UA	RA	UA	RA	UA	A	R	RA	UA	RA	UA	RA	UA	RA	UA	RA	UA	A	R
1. Assessment of results																								
The stakeholders who can contribute to the economic development of my community work effectively together to achieve common objectives.	2.74	2.78	2.79	2.62	3.00	2.19	2.71	2.82	3.33	2.44	2.74	247	2.90	2.35	2.72	2.73	3.25	2.46	3.50	2.30	3.00	3.00	2.68	118
The policies and programs developed by the various levels of government help target the action and increase the economic benefits for my community.	2.36	2.48	2.65	2.48	2.42	2.12	2.43	2.70	2.78	2.75	2.48	238	2.65	2.58	2.79	2.79	2.75	2.31	3.00	2.60	3.00	3.00	2.68	119
The business and workforce priorities were met by the support programs.	2.05	2.40	2.55	2.48	2.65	2.13	2.20	2.73	3.00	2.33	2.41	223	2.45	2.33	2.25	2.33	2.75	2.30	3.00	2.56	2.80	2.43	2.41	111
The private businesses and social institutions in my community benefit fully from the available services and infrastructure.	1.98	2.28	2.31	2.06	2.48	2.19	2.83	2.64	2.88	2.00	2.24	234	2.38	2.40	2.22	2.63	2.75	2.70	-	2.00	2.50	2.50	2.42	112
The community takes full advantage of the services and infrastructure available.	2.09	2.19	2.21	2.06	2.48	2.19	1.86	2.55	2.43	2.00	2.19	235	2.45	2.67	2.18	2.44	3.50	2.50	2.50	2.00	2.00	2.00	2.41	116
2. Factors driving business development																								
Strengthening HR capabilities	3.48	3.61	3.76	3.65	3.64	3.78	4.00	3.45	3.89	3.50	3.64	243	3.83	3.67	3.72	3.65	3.25	3.38	4.00	3.33	3.40	3.29	3.61	122
Breaking into new markets	3.58	3.61	3.49	3.28	3.57	3.78	3.71	3.36	3.57	3.86	3.54	235	3.77	3.67	3.53	3.50	3.25	3.31	4.00	3.40	4.00	4.00	3.60	117
Increasing funding	3.41	3.45	3.85	3.56	3.65	3.56	3.57	3.30	3.71	3.14	3.55	236	3.59	3.57	3.56	3.60	3.75	3.54	4.00	3.40	3.75	3.57	3.58	118
Improving the quality of goods and services	3.62	3.49	3.58	3.42	3.64	3.71	3.43	3.36	3.89	3.43	3.56	241	3.57	3.48	3.37	3.36	3.75	3.31	4.00	3.22	3.75	3.86	3.47	116
Increasing innovation	3.29	3.42	3.59	3.32	3.52	3.67	3.57	3.20	3.78	3.63	3.45	239	3.61	3.69	3.42	3.50	3.50	3.50	4.00	3.20	3.75	3.71	3.55	123
Improving marketing, launching and branding	3.59	3.60	3.68	3.36	3.67	3.78	3.86	3.36	3.50	3.50	3.59	239	3.76	3.55	3.42	3.13	3.75	3.36	4.00	3.00	3.75	3.71	3.48	115
Developing or expanding my business and support networks	3.65	3.64	3.40	3.61	3.52	3.93	3.50	3.36	3.50	3.33	3.58	234	3.76	3.59	3.35	3.67	3.25	3.23	4.00	3.13	3.67	3.43	3.50	111
Increasing productivity and reducing costs	3.48	3.46	3.48	3.44	3.55	3.61	3.50	3.27	3.75	3.00	3.47	233	3.42	3.52	3.42	3.15	3.25	3.00	3.50	2.70	3.50	3.71	3.32	113
Finding a niche or specialization	3.46	3.33	3.54	3.32	3.61	3.47	3.29	3.45	3.38	3.88	3.45	241	3.57	3.54	3.32	3.21	3.67	3.42	4.00	3.11	3.25	3.43	3.42	115
Hiring program	3.68	3.41	3.55	3.59	3.57	3.88	3.60	3.20	3.22	3.75	3.56	247	3.29	3.52	3.33	3.40	3.25	2.85	4.00	3.10	3.00	3.71	3.32	120
Increasing the use of technology	3.41	3.44	3.49	3.30	3.30	3.50	3.71	3.36	3.75	3.29	3.43	237	3.52	3.43	3.26	3.13	3.25	3.17	3.50	3.20	3.00	3.71	3.34	118
Promoting knowledge management	3.34	3.37	3.33	3.32	3.41	3.53	3.67	3.00	3.38	3.50	3.36	238	3.67	3.63	3.24	3.47	3.50	3.23	4.00	3.38	3.80	3.57	3.50	118
Improving the processes for receiving and integrating newcomers into the labour market	3.37	3.44	3.13	3.52	3.38	3.56	3.57	3.27	3.78	4.00	3.42	243	3.57	3.17	2.94	3.80	3.00	3.33	4.00	3.50	3.60	3.71	3.39	117
Improving employees' level of bilingualism	3.45	3.25	3.68	3.48	3.57	3.35	3.71	3.55	3.56	3.75	3.49	244	3.32	3.50	3.21	3.36	3.25	3.38	4.00	3.20	3.00	3.14	3.33	120
Succession planning	2.64	2.61	3.35	3.28	3.20	3.19	3.83	3.36	3.22	3.00	3.04	216	3.52	3.29	3.37	3.53	4.00	3.23	3.50	3.60	3.50	3.86	3.45	117
Upgrading equipment	3.08	2.93	3.29	3.20	3.26	3.28	3.71	3.00	3.56	3.00	3.17	226	3.47	3.26	3.32	3.33	3.33	3.15	3.50	3.20	3.00	3.43	3.31	114
Securing Francophone partners, suppliers and investors	3.27	3.05	3.11	3.52	3.45	3.33	3.43	2.90	3.44	3.80	3.26	233	3.21	3.57	3.06	3.07	3.00	3.31	3.50	3.50	3.50	3.33	3.29	112
Simplifying and streamlining the tax system	3.25	3.20	2.95	3.22	3.36	3.72	2.80	2.80	2.89	3.57	3.20	240	3.06	3.30	2.78	3.25	3.00	2.75	4.00	2.75	2.25	3.14	3.01	106
Identifying better suppliers	3.02	3.05	3.11	3.08	3.39	3.33	2.83	2.88	3.11	3.25	3.10	214	3.14	3.29	3.24	2.93	3.00	3.00	3.00	3.00	3.00	3.14	3.12	110

	WESTERN CANADA												NORTHERN CANADA						
CPED for OLMC	BC		CO		Res		ERI		GO				BC		CO	Res	GO		
Promising sectors	RA	UA	RA	UA	RA	UA	RA	UA	RA	UA	A	R	RA	UA	UA	UA	UA	A	R
1. Assessment of results																			
The stakeholders who can contribute to the economic development of my community work effectively together to achieve common objectives.	2.60	2.46	3.00	2.96	2.50	2.75	1.50	2.33	3.00	3.00	2.74	65	4.00	3.00	2.83	3.50	3.00	3.07	14
The policies and programs developed by the various levels of government help target the action and increase the economic benefits for my community.	3.40	2.69	3.00	3.15	1.50	3.00	1.50	2.50	3.00	2.50	2.89	64	4.00	2.33	3.00	3.50	3.00	3.00	13
The business and workforce priorities were met by the support programs.	2.60	2.54	2.80	2.84	1.50	2.00	1.00	2.00	2.00	2.00	2.52	62	3.00	1.00	2.20	3.00	2.00	2.30	10
The private businesses and social institutions in my community benefit fully from the available services and infrastructure.	2.40	2.73	2.80	2.56	3.00	2.33	3.00	2.33	3.00	2.50	2.61	62	3.00	4.00	2.80	2.50	3.00	2.90	10
The community takes full advantage of the services and infrastructure available.	2.60	2.54	2.80	2.44	3.00	2.75	2.67	2.33	3.00	2.00	2.52	65	4.00	3.00	2.67	3.00	3.00	2.92	13
2. Factors driving business development																			
Strengthening HR capabilities	3.40	3.27	3.60	3.38	3.50	4.00	3.00	3.00	4.00	3.75	3.42	64	3.00	4.00	3.67	3.50	-	3.69	13
Breaking into new markets	3.00	3.38	3.20	3.42	3.50	3.50	2.67	4.00	3.00	3.33	3.34	64	3.00	3.75	2.83	4.00	4.00	3.31	13
Increasing funding	3.60	3.23	3.20	3.52	3.50	3.50	2.00	4.00	4.00	4.00	3.43	65	2.00	3.75	3.50	2.50	4.00	3.36	14
Improving the quality of goods and services	3.60	3.31	3.40	3.46	3.50	3.25	2.67	4.00	4.00	3.25	3.39	62	2.00	3.75	3.33	3.00	3.00	3.29	14
Increasing innovation	3.60	3.31	3.20	3.50	3.50	3.75	2.67	4.00	4.00	3.75	3.47	64	2.00	3.75	3.67	2.50	4.00	3.43	14
Improving marketing, launching and branding	3.20	3.00	3.40	3.54	3.50	3.50	2.00	4.00	4.00	3.50	3.34	62	3.00	3.75	2.67	2.00	4.00	3.00	14
Developing or expanding my business and support networks	3.60	3.23	3.60	3.58	3.50	3.75	2.67	4.00	4.00	3.00	3.48	65	2.00	3.75	3.00	2.50	4.00	3.15	13
Increasing productivity and reducing costs	3.60	3.25	3.20	3.39	3.50	3.75	1.67	4.00	3.00	2.67	3.27	59	3.00	3.75	3.67	3.50	3.00	3.57	14
Finding a niche or specialization	3.60	3.33	3.20	3.32	4.00	3.50	2.67	4.00	3.00	3.00	3.32	62	4.00	3.50	2.67	2.00	4.00	3.00	14
Hiring program	3.80	3.33	3.60	3.22	3.00	2.75	2.00	3.50	4.00	3.25	3.25	61	4.00	3.00	3.17	3.00	4.00	3.21	14
Increasing the use of technology	3.40	3.08	3.60	3.21	3.50	3.50	2.67	4.00	4.00	3.25	3.28	64	2.00	3.25	3.33	2.50	4.00	3.14	14
Promoting knowledge management	3.00	3.50	3.40	3.50	3.00	3.50	3.00	4.00	3.00	3.50	3.42	62	2.00	4.00	3.50	3.00	4.00	3.50	14
Improving the processes for receiving and integrating newcomers into the labour market	3.00	3.55	3.80	3.46	3.00	3.00	3.00	4.00	3.00	3.25	3.41	64	2.00	3.00	3.83	2.50	4.00	3.29	14
Improving employees' level of bilingualism	3.60	2.91	3.60	3.27	4.00	3.25	2.33	4.00	3.00	3.00	3.25	64	4.00	3.75	3.17	4.00	4.00	3.57	14
Succession planning	3.20	3.08	3.60	3.40	3.00	3.25	2.33	4.00	4.00	2.67	3.27	64	-	3.75	3.17	2.00	3.00	3.15	13
Upgrading equipment	3.00	2.91	3.40	2.92	3.50	4.00	3.00	4.00	4.00	3.00	3.12	60	2.00	3.00	3.00	2.50	-	2.83	12
Securing Francophone partners, suppliers and investors	2.40	2.82	3.40	3.28	3.50	3.00	2.00	4.00	3.00	3.25	3.10	63	-	3.00	3.00	2.00	4.00	2.92	13
Simplifying and streamlining the tax system	3.40	3.33	2.60	2.83	4.00	3.00	1.67	4.00	3.00	3.00	2.98	60	4.00	2.75	3.17	2.00	4.00	3.08	13
Identifying better suppliers	3.50	2.83	3.20	2.95	3.00	3.00	2.67	4.00	3.00	2.33	2.98	58	2.00	3.25	3.00	3.00	1.00	2.85	13

	NAT.		ATLANTIC CANADA												QUEBEC												ONTARIO												WESTERN CANADA												NORTHERN CANADA						
CPED for OLMC			BC		CO		Res		ERI		GO				BC		CO		Res		ERI		GO				BC		CO		Res		ERI		GO				BC		CO		Res		ERI		GO				BC		CO	Res	GO		
Promising sectors	A	R	RA	UA	RA	UA	RA	UA	RA	UA	RA	UA	A	R	RA	UA	RA	UA	RA	UA	RA	UA	RA	UA	A	R	RA	UA	RA	UA	RA	UA	RA	UA	RA	UA	A	R	RA	UA	RA	UA	RA	UA	RA	UA	RA	UA	A	R	RA	UA	UA	UA	UA	A	R
B. OPPORTUNITIES																																																									
3. Assets for community development	*Several important assets that should be leveraged by the communities.*																																																								
Affordable telecommunications and high-speed Internet access	3.69	590	3.81	3.82	3.80	3.64	3.90	4.00	3.64	4.00	3.80	3.50	3.78	164	3.69	3.73	3.73	3.56	3.67	3.63	3.43	3.80	3.71	3.89	3.69	235	3.79	3.52	3.35	3.63	3.50	3.67	4.00	3.50	3.75	3.86	3.61	112	3.80	3.54	4.00	3.56	3.50	3.75	3.00	4.00	4.00	3.75	3.63	65	4.00	4.00	3.50	2.00	4.00	3.50	14
Access to a skilled workforce	3.67	589	3.71	3.81	3.76	3.71	3.70	4.00	3.93	4.00	3.80	3.75	3.78	162	3.44	3.65	3.66	3.45	3.36	3.75	3.71	3.82	3.57	3.56	3.56	234	3.85	3.78	3.65	3.75	3.75	3.64	4.00	3.50	4.00	3.86	3.75	114	3.40	3.43	3.60	3.83	3.00	3.75	3.00	4.00	4.00	4.00	3.65	65	4.00	3.50	3.83	2.50	4.00	3.57	14
Synergy with other businesses or partners	3.54	588	3.47	3.69	3.73	3.64	3.70	3.33	3.43	3.83	3.47	3.57	3.60	164	3.46	3.55	3.51	3.45	3.46	3.63	3.86	3.64	3.43	3.63	3.52	233	3.72	3.38	3.29	3.73	3.75	3.80	3.50	3.30	3.75	3.71	3.55	111	3.60	3.36	3.40	3.38	3.50	3.50	2.67	4.00	3.00	3.67	3.41	66	3.00	4.00	3.83	2.50	4.00	3.64	14
The business environment in my community	3.53	599	3.47	3.65	3.66	3.64	3.50	3.33	3.57	3.50	3.60	3.50	3.57	166	3.63	3.57	3.61	3.42	3.54	3.56	3.86	3.45	3.57	4.00	3.58	238	3.58	3.40	3.47	3.73	3.75	3.45	3.50	3.00	3.75	3.14	3.46	114	3.20	3.43	4.00	3.42	3.50	3.50	2.67	3.00	4.00	3.50	3.42	67	3.00	3.25	3.33	2.00	4.00	3.14	14
The cultural and social environment in my community	3.52	599	3.34	3.35	3.61	3.71	3.70	3.33	3.43	3.33	3.53	3.63	3.50	166	3.50	3.45	3.59	3.67	3.79	3.27	3.86	3.64	3.43	3.67	3.57	237	3.65	3.32	3.18	3.44	4.00	3.33	4.00	3.40	3.75	3.57	3.44	117	3.80	3.38	4.00	3.52	3.50	3.25	3.00	3.67	4.00	3.75	3.54	65	3.00	4.00	3.33	2.50	4.00	3.43	14
Ease of transportation	3.36	593	3.25	3.44	3.59	3.79	3.80	2.67	3.79	3.67	3.53	3.38	3.52	163	3.11	3.29	3.48	3.24	3.46	3.63	3.71	3.60	3.43	3.44	3.35	235	3.40	3.17	3.35	3.33	3.25	3.17	3.50	3.50	3.00	3.57	3.31	115	3.00	3.29	3.60	3.12	2.50	3.25	2.67	3.33	4.00	3.25	3.18	66	3.00	2.75	3.00	2.50	4.00	2.93	14
Availability of reliable suppliers providing minority-language services	3.34	589	3.13	3.24	3.38	3.29	3.70	3.00	3.64	3.50	3.60	3.14	3.35	164	3.42	3.36	3.35	3.19	3.50	3.80	3.57	3.64	3.14	3.38	3.40	233	3.60	3.40	3.18	3.27	3.25	3.36	4.00	3.30	3.25	3.57	3.38	114	2.40	3.23	3.40	3.24	3.00	3.00	2.33	4.00	3.00	2.67	3.13	64	3.00	3.50	2.50	2.00	4.00	2.86	14
Proximity to a major market	3.25	584	3.27	3.20	3.37	3.50	3.40	3.33	3.36	3.20	3.07	2.86	3.29	161	3.17	3.39	3.17	3.03	3.04	3.38	3.14	3.50	3.29	3.38	3.21	234	3.65	3.23	3.24	3.14	3.25	3.27	2.50	3.20	3.00	3.29	3.28	111	3.20	3.31	3.40	3.35	3.50	3.50	2.00	3.50	4.00	3.67	3.31	64	3.00	3.00	3.17	2.50	3.00	3.00	14
4. Promising sectors	*Priority sectors that vary from region to region and depending on whether it is a rural or urban area.*																																																								
Tourism	3.36	577	3.49	3.50	3.39	3.93	3.60	2.67	3.50	3.33	3.64	3.86	3.52	162	3.28	3.11	3.49	3.44	2.82	2.87	3.43	3.44	3.29	3.38	3.25	225	3.10	3.18	2.94	3.54	4.00	3.45	3.00	3.40	3.40	3.83	3.29	110	3.40	3.50	3.20	3.42	2.50	3.00	2.67	4.00	3.00	3.75	3.37	67	2.00	4.00	3.50	4.00	4.00	3.62	13
Arts and culture	3.13	574	3.11	3.12	3.25	3.57	3.30	2.67	3.00	3.33	3.29	3.14	3.20	161	3.02	3.18	3.13	3.44	2.59	3.00	3.00	3.25	2.43	3.75	3.10	221	2.70	2.75	3.00	3.53	4.00	3.55	4.00	3.30	2.80	3.50	3.11	114	3.20	3.15	3.00	3.12	1.50	2.75	3.00	3.50	3.00	4.00	3.11	64	3.00	3.75	2.67	3.00	3.00	3.07	14
Education	3.09	578	3.08	3.00	3.00	3.00	2.90	2.33	3.07	3.17	3.25	3.14	3.04	160	2.57	3.10	2.90	3.15	2.67	2.94	2.71	3.27	2.71	3.13	2.90	227	3.00	3.50	3.19	3.57	3.25	3.45	4.00	3.60	3.25	3.50	3.37	110	3.60	3.29	3.80	3.42	3.50	3.00	3.00	3.67	4.00	3.00	3.39	67	2.00	3.75	2.83	3.00	3.00	3.07	14
Health and environmental services	3.09	575	3.11	3.06	2.98	3.23	2.80	2.67	3.29	2.83	3.23	3.14	3.07	161	2.81	3.03	2.73	3.25	2.52	3.06	2.57	3.20	2.71	3.25	2.91	224	3.05	3.30	3.00	3.50	3.50	3.82	3.50	3.40	3.25	3.43	3.31	112	3.40	3.38	3.60	3.48	2.00	3.00	3.33	2.50	4.00	3.25	3.34	64	2.00	3.50	3.17	2.50	4.00	3.14	14
Sports and recreation	3.04	572	3.16	2.94	2.90	3.00	3.30	2.33	2.77	2.17	3.15	3.43	2.99	160	3.07	3.15	2.88	3.34	2.64	2.63	2.14	3.11	2.86	3.50	3.00	227	2.95	2.96	3.00	3.38	3.75	3.82	3.00	3.40	3.75	3.00	3.20	109	3.00	3.15	3.40	3.25	2.00	2.75	2.67	3.00	3.00	3.75	3.15	62	2.00	3.50	1.83	3.50	2.00	2.57	14
Telecommunications	2.84	558	2.89	2.88	2.80	3.15	2.70	2.00	2.54	3.17	2.77	2.67	2.83	160	2.02	3.16	2.43	3.10	2.14	2.93	2.14	3.10	2.71	3.25	2.64	218	2.63	3.43	2.88	3.31	2.75	3.36	4.00	3.20	3.25	4.00	3.18	105	2.60	3.25	3.00	3.08	2.00	3.25	2.67	3.50	3.00	3.00	3.03	62	1.00	3.75	3.00	2.00	-	2.92	13
Construction (roads and building infrastructure, etc.)	2.78	564	2.71	2.81	2.63	3.23	2.80	2.67	2.54	2.33	3.00	2.67	2.75	157	2.24	2.54	2.43	2.73	2.09	2.56	1.57	3.00	2.29	3.25	2.45	221	2.80	3.09	3.00	3.15	3.33	3.36	3.00	3.20	2.60	3.40	3.06	108	3.00	3.69	3.60	3.62	2.50	2.75	3.00	3.50	3.00	3.00	3.42	64	3.00	3.00	3.83	2.00	4.00	3.29	14
Entertainment industry	2.65	557	2.73	2.53	2.71	3.31	2.56	2.00	2.17	3.00	2.54	3.43	2.71	158	2.00	2.97	1.93	3.19	1.90	2.86	1.86	2.57	1.86	3.38	2.44	214	2.42	2.95	2.53	3.38	2.75	3.45	4.00	3.00	2.60	2.40	2.87	108	2.25	3.08	2.60	2.92	1.50	3.25	2.33	3.67	3.00	3.00	2.88	65	2.00	3.50	1.60	2.00	-	2.33	12
Scientific research	2.63	542	2.61	2.29	2.61	3.38	2.80	2.00	2.50	3.00	2.42	3.14	2.66	157	1.67	3.03	1.97	3.32	1.72	3.13	2.29	3.38	1.57	3.38	2.47	205	2.21	2.77	2.44	3.00	2.75	2.90	3.00	3.44	2.50	3.00	2.72	105	2.60	2.91	1.80	3.04	2.50	3.00	2.33	4.00	2.00	3.25	2.85	62	2.00	2.75	2.40	4.00	4.00	2.85	13
Transportation and storage	2.62	541	2.63	2.88	2.60	2.77	2.40	2.33	2.57	2.33	2.71	3.00	2.64	157	1.77	2.65	2.08	2.61	2.00	2.71	2.00	2.63	1.71	2.63	2.25	204	2.65	3.18	3.13	2.92	2.67	3.00	3.00	3.10	3.00	3.40	3.00	103	2.60	3.15	3.80	3.40	3.50	2.50	2.00	4.00	3.00	2.50	3.14	63	1.00	2.50	3.33	2.00	3.00	2.71	14
Life sciences and biotechnology	2.58	529	2.47	2.47	2.50	3.23	3.00	1.67	2.17	3.33	2.69	3.17	2.62	151	1.65	2.94	1.97	3.28	1.84	3.00	2.29	3.25	1.71	3.50	2.44	203	2.06	2.57	2.50	3.00	2.75	2.80	3.00	3.11	3.00	3.20	2.66	100	2.50	3.15	2.20	3.08	2.00	3.25	2.00	3.50	3.00	3.00	2.92	63	1.00	2.25	1.60	3.00	-	2.00	12
Processing (manufacturing sector)	2.58	534	2.94	3.00	2.69	3.08	2.60	2.00	2.77	2.40	3.15	3.00	2.84	154	2.02	2.60	2.11	2.22	2.05	2.15	1.86	2.56	2.00	2.38	2.20	198	2.70	2.91	2.69	2.83	3.25	2.91	2.50	3.00	2.60	3.00	2.83	108	2.40	3.00	2.60	3.04	2.00	3.25	2.00	4.00	2.00	3.00	2.87	62	1.00	1.50	1.80	1.50	-	1.58	12
Livestock and agriculture	2.56	524	2.76	2.81	2.54	2.55	2.70	2.33	2.54	2.50	2.80	2.43	2.64	157	2.50	2.00	2.63	1.71	2.26	1.83	2.71	2.00	2.71	2.00	2.28	189	2.95	2.40	2.94	2.42	3.25	2.20	4.00	2.89	3.80	2.33	2.74	105	3.50	3.58	3.60	3.00	3.50	2.50	2.33	4.00	3.00	3.25	3.18	61	1.00	1.50	1.20	1.00	-	1.25	12
Energy, mines and natural resources	2.53	515	2.64	2.53	2.36	3.25	2.40	2.67	2.57	2.83	2.71	2.86	2.61	156	1.92	2.04	1.97	1.59	2.33	2.00	1.71	2.75	2.43	2.60	2.03	182	2.60	2.74	2.80	2.00	3.25	3.00	4.00	3.11	3.20	2.33	2.74	103	2.00	3.09	4.00	3.48	3.00	3.25	3.33	4.00	1.00	2.50	3.25	60	1.00	4.00	4.00	2.50	4.00	3.57	14
Logging and wildlife harvesting goods and services	2.41	510	2.94	2.82	2.63	2.73	2.90	2.67	2.46	2.60	2.87	3.00	2.77	154	2.29	1.93	2.08	1.54	2.05	1.92	2.29	2.00	2.71	2.75	2.06	182	2.75	2.35	2.47	1.75	3.50	2.50	4.00	2.44	2.60	2.17	2.48	103	2.25	2.82	2.40	2.72	2.50	2.25	2.33	3.00	2.00	2.00	2.57	60	1.00	2.25	1.25	1.50	-	1.64	11
Fisheries, aquaculture and fish farming industry	2.23	496	3.20	2.76	2.97	3.17	3.00	2.33	2.57	3.00	3.47	3.29	3.03	156	1.78	1.46	1.97	1.27	2.24	1.62	2.00	1.50	2.71	1.67	1.79	177	2.17	1.63	1.60	1.42	2.00	2.00	2.00	2.50	2.60	1.33	1.85	96	2.33	2.00	2.60	1.68	1.50	2.50	2.33	3.00	1.00	1.67	1.96	54	3.00	2.25	3.00	1.00	4.00	2.54	13
Call centres	2.23	534	2.32	2.41	2.16	2.46	2.10	2.33	2.07	2.25	2.14	2.00	2.24	153	1.61	2.57	1.92	2.50	1.95	2.36	1.29	2.10	1.86	2.25	2.07	200	2.00	2.78	2.38	2.83	2.67	3.36	3.00	3.20	2.40	2.83	2.67	108	1.75	2.58	1.40	2.12	1.00	2.25	1.33	4.00	1.00	2.50	2.10	62	1.00	1.50	1.25	2.00	-	1.45	11
Aeronautics	2.13	486	2.10	2.18	1.89	2.69	2.22	1.33	1.75	2.33	1.75	1.67	2.04	139	1.20	2.61	1.43	3.23	1.41	2.55	1.43	3.33	1.17	3.57	2.06	181	1.42	2.82	2.13	2.83	2.25	2.90	2.00	2.44	2.25	2.83	2.36	98	2.40	2.56	2.20	2.26	1.00	2.50	1.33	4.00	1.00	3.33	2.30	56	1.00	2.25	1.60	1.00	-	1.67	12
5. Other opportunities	*Trends to leverage.*																																																								
Increased use of social media and online services	3.13	582	3.43	3.35	3.05	3.46	3.20	2.67	3.54	3.17	3.21	3.29	3.28	160	2.65	3.33	2.98	3.35	2.53	2.73	2.71	3.18	3.00	3.75	3.00	230	3.26	3.33	3.06	3.06	2.00	3.09	4.00	3.20	3.75	3.57	3.21	114	3.20	2.93	3.20	3.24	2.00	3.50	3.00	3.50	4.00	3.00	3.14	64	2.00	3.00	3.00	2.00	4.00	2.86	14
Changing needs of an aging population	3.01	578	2.97	3.41	3.05	3.54	3.50	2.67	3.14	3.17	3.00	3.29	3.15	160	2.27	2.83	3.00	3.21	2.40	2.53	3.14	3.00	2.86	3.25	2.78	226	2.85	3.61	2.83	3.31	3.00	3.36	3.00	3.10	3.50	3.29	3.19	115	3.60	3.08	3.80	3.08	2.00	3.00	3.00	4.00	3.00	3.25	3.17	64	2.00	2.33	2.50	3.00	4.00	2.62	13
Attracting and retaining young entrepreneurs and workers	2.99	571	3.08	3.07	3.18	3.33	2.90	2.00	3.21	2.33	3.21	3.29	3.09	159	2.22	2.82	2.79	3.09	2.40	2.62	2.43	2.70	2.71	3.00	2.67	222	3.25	3.22	2.83	3.56	3.50	3.00	4.00	3.00	3.20	3.43	3.21	114	3.00	3.42	3.60	3.36	3.50	3.50	3.50	4.00	4.00	3.00	3.39	62	2.00	3.50	4.00	2.50	2.00	3.36	14
Promoting interest in alternative energy sources (wind, solar, etc.)	2.89	552	3.03	3.41	3.02	3.00	3.60	2.33	3.46	2.83	2.93	2.86	3.10	161	2.33	2.68	2.39	2.52	2.42	2.53	3.17	3.00	3.00	2.57	2.52	204	2.89	3.08	2.72	2.93	3.25	2.73	4.00	3.50	3.25	3.50	3.03	113	2.50	3.00	3.40	3.25	3.00	3.00	2.50	4.00	3.00	3.75	3.18	61	2.00	3.75	3.20	3.50	3.00	3.31	13
Lack of succession for businesses	2.79	497	2.83	3.13	3.08	3.27	2.90	1.00	3.00	2.20	3.23	2.86	2.97	149	1.89	2.80	2.31	2.78	2.00	2.00	3.75	2.63	2.86	1.86	2.39	178	3.00	3.00	2.69	3.54	3.25	3.13	4.00	3.33	3.00	3.20	3.09	98	2.50	3.15	2.80	3.08	2.00	3.00	2.50	4.00	3.00	3.00	2.98	58	2.00	3.00	3.33	2.50	3.00	3.00	14
Interest of investors, business people and workers in moving to Canada	2.65	551	2.56	2.82	2.56	3.33	2.90	2.00	2.83	2.83	2.71	3.00	2.72	156	1.69	2.78	2.05	2.76	1.79	2.38	2.00	2.89	1.86	2.75	2.27	210	2.67	3.09	2.35	3.13	2.75	3.11	2.50	3.00	2.75	3.57	2.90	109	2.20	3.25	3.60	3.48	1.50	3.00	2.50	4.00	3.00	3.00	3.19	62	2.00	3.00	3.83	2.50	3.00	3.21	14
Increased demand for goods and services in emerging countries	2.49	503	2.47	2.71	2.50	2.64	2.67	2.33	3.00	2.40	3.15	3.33	2.66	146	1.72	2.70	2.00	2.68	2.00	2.27	1.33	2.60	2.14	2.67	2.22	189	2.41	2.19	2.29	3.00	1.67	2.60	4.00	2.90	2.25	3.17	2.53	99	2.00	3.27	2.80	2.92	2.00	2.75	2.50	4.00	3.00	2.67	2.89	57	2.00	2.75	2.60	2.00	-	2.50	12
6. Sources of growth	*Regional markets are the top priority, with the exception of Northern Canada.*																																																								
Regional market	3.04	576	3.21	3.41	3.10	3.23	3.20	2.33	2.77	3.33	3.38	3.00	3.16	161	2.64	2.85	2.71	3.30	2.19	2.73	2.57	2.91	2.43	3.38	2.78	227	2.85	3.30	3.00	3.33	3.75	3.00	3.50	3.30	3.75	3.20	3.18	112	2.80	3.31	3.80	3.42	3.50	3.25	4.00	3.00	4.00	3.00	3.36	64	2.00	3.25	3.50	2.50	4.00	3.17	12
Local market	2.98	585	3.03	3.13	3.05	3.31	3.40	2.33	2.62	3.00	3.23	2.86	3.05	160	2.56	2.90	2.68	3.27	2.32	2.60	2.71	2.64	3.14	3.50	2.78	232	2.60	3.22	2.78	3.20	3.50	3.27	3.00	3.10	3.75	3.17	3.05	113	2.80	3.15	3.80	3.46	3.50	2.75	3.00	3.33	4.00	2.75	3.27	66	2.00	3.00	3.67	3.50	4.00	3.36	14
Provincial or territorial market	2.96	566	3.17	3.41	2.97	3.31	3.20	2.67	2.85	3.17	3.38	3.43	3.15	157	2.40	2.72	2.50	3.15	2.20	2.53	2.40	3.00	2.29	3.29	2.63	220	2.55	2.95	2.89	3.60	3.75	3.09	4.00	2.78	3.50	3.00	3.03	110	3.00	3.46	3.80	3.42	3.50	3.75	3.00	3.00	3.00	2.75	3.37	65	2.00	3.50	3.67	2.50	4.00	3.36	14
National market	2.74	545	2.91	3.00	2.82	3.15	2.80	2.67	2.46	3.17	3.15	2.71	2.89	154	2.15	2.97	2.34	3.00	1.78	2.62	1.80	3.09	1.71	3.57	2.53	206	2.65	2.59	2.67	3.36	3.50	2.70	4.00	2.40	2.75	3.17	2.80	107	2.40	2.93	3.20	2.96	2.50	3.75	2.00	3.00	2.00	2.75	2.89	64	1.00	3.00	3.00	2.50	4.00	2.86	14
US market	2.53	518	2.82	2.56	2.89	2.60	2.40	2.33	2.58	3.00	2.92	2.43	2.74	148	1.78	2.97	2.32	2.71	1.83	2.31	2.20	3.10	2.00	3.00	2.38	196	2.26	2.55	2.62	2.82	3.25	2.80	3.50	2.30	2.75	2.00	2.56	100	2.20	2.42	3.20	2.70	2.00	3.00	2.00	2.00	3.00	2.50	2.57	61	1.00	2.00	2.20	2.00	1.00	1.92	13
Europe	2.30	483	2.55	2.25	2.63	3.18	2.33	2.00	2.67	3.00	3.08	2.67	2.64	138	1.58	2.56	1.87	2.57	1.63	2.33	2.00	1.50	1.14	2.83	2.04	184	1.88	2.16	2.29	2.82	2.67	2.22	3.50	2.44	3.00	2.50	2.34	91	1.60	2.30	2.40	2.41	1.50	2.33	2.33	2.00	2.00	2.33	2.25	56	1.00	1.75	2.67	2.00	2.00	2.14	14
Asia	2.14	470	2.29	2.06	2.36	2.60	2.22	2.00	2.50	2.83	2.45	2.83	2.37	134	1.19	2.29	1.56	2.43	1.63	2.36	1.60	2.22	1.29	3.00	1.88	177	1.94	2.17	1.85	2.40	3.00	1.89	4.00	2.33	2.75	2.00	2.17	87	1.60	2.33	2.60	2.45	2.00	2.50	2.67	3.50	1.00	2.67	2.39	59	1.00	2.50	2.20	2.00	2.00	2.15	13
Latin America	1.93	459	2.08	2.13	1.97	2.10	2.22	2.00	2.42	2.40	1.73	2.00	2.08	128	1.19	2.26	1.57	2.52	1.47	2.00	1.60	1.63	1.00	2.75	1.78	172	1.56	1.79	1.77	2.60	2.00	2.22	3.50	1.88	2.75	2.00	1.99	88	1.40	2.17	2.40	2.10	1.50	2.75	1.67	2.00	1.00	1.67	2.03	58	1.00	1.75	1.60	1.50	1.00	1.54	13
Africa	1.87	447	1.84	1.79	2.03	2.11	2.00	1.50	2.33	2.00	1.70	2.17	1.97	123	1.11	2.00	1.31	2.11	1.40	1.90	1.40	2.00	1.00	2.00	1.60	169	1.69	1.72	2.00	2.70	3.00	2.11	3.50	2.29	2.50	2.25	2.09	85	1.60	2.17	2.40	2.45	1.50	1.67	2.00	3.50	1.00	2.33	2.22	58	1.00	1.67	1.40	1.00	1.00	1.33	12

APPENDIX E

TABLE OF MAIN SUGGESTIONS RECEIVED

PROPOSED PAN-CANADIAN INITIATIVES, ENTREPRENEURSHIP COMPONENT	
Promotion and positioning of OLMCs	• Understanding and positioning of OLMCs • Branding the competitive advantages in the regions • Encouraging people to produce and buy locally • Sharing success stories on a common platform • Promote opportunities • Policy on provincial services in French • Bilingual presence in common media • Support for participation in trade shows • Economic missions and workshops on accessible markets
Cooperation and collaboration	• Greater local and government involvement • Increased on the ground participation by government • More coordination between organizations • Partnership between local businesses / alliances • A greater bridge between Francophone and Anglophone communities • Francophone Chambers of Commerce • Groups/networks of Francophone businesses • Online community • Inter-provincial/territorial exchanges • Remove barriers to interprovincial or interterritorial trade • Encourage collaboration and mutual assistance among regions • National strategies such as tourism • Establishing a fluid economic corridor
Training and knowledge sharing	• Business management training for entrepreneurs • Teach entrepreneurship skills starting in elementary school • Share experiences of Francophone entrepreneurs from across the country • Mentorship program for entrepreneurs over 1, 3 and 5 years • Sharing experiences and success stories on a common platform
Funding and procurement	• Easier bidding access system • Investment funds for OLMC start-ups • Support for growing businesses • Financial help or tax relief for social enterprises • Subsidies for business and commerce • Crowdfunding
Targeted sector support	• Development of renewable energy • Development of manufacturing sector • Develop emerging industries • Significant investments in rail transport • Improve road and air transportation in the North • Invest in our strategic infrastructure
Target beneficiaries	• Business succession program • Financial support for women entrepreneurs
PROPOSED PAN-CANADIAN INITIATIVES, EMPLOYABILITY COMPONENT	
Training and knowledge sharing	• Literacy and essential skills • Workforce development assistance program • Workforce development needs handled at the regional level • Business recruitment assistance program • Paid internship program for youth • Interprovincial pairing/sponsorship of qualified workers
Target beneficiaries	• Youth repatriation and retention program • Target business immigrants who will settle in the regions