



Thunder Bay
Ventures

Community Futures Development Corporation

2008 Thunder Bay Small
Business Opinion Survey

June 2008

11th Annual Report

presented by Thunder Bay Ventures

to examine the attitudes of the business community towards specific
issues and developments in the local community.

Executive Summary

Completion of the “2008 Thunder Bay Business Opinion Survey” marks the eleventh (11th) year since the inception of the survey, which gives a voice to the small business community of the region. The Thunder Bay Business Opinion Survey provides third parties with an in-depth analysis of the thoughts of small businesses. The findings of the survey include both quantitative and qualitative aspects, and also examine the recent and future environmental conditions that small businesses operate under. Every effort was made to ensure that the statistics and data represented the population and that all bias was eliminated. The presentation and formatting of this report is similar to that of previous years.

The survey presented findings in several key areas that should be noted:

1. Small businesses in Thunder Bay have growing concerns for the rising fuel (oil/gasoline) rates.
2. Thirty-eight (38%) percent of firms are expecting to hire new employees within the next 12 months, which is an increase of 10% from last year. Layoff expectations have also dropped considerably, to only 3%. These findings are supported by the increase in 2006-2007 annual sales.
3. Sixty percent (60%) of small business respondents believe that the Thunder Bay economy will have negative or no growth over the next year. Although this finding remains pessimistic, respondent attitudes have improved, as respondent beliefs were 78% and 85% respectively over the past two years. Therefore, this improvement is an indication that small business owners are feeling that the economy is on track for recovery.
4. The mining industry appears to be the most favorable industry amongst small business owners as to which industry Thunder Bay should focus its efforts upon; with an overwhelming 100% of small businesses believing it would have a positive impact on their business. Healthcare, renewable energy sources, higher education and senior services should also be mentioned, as their mean scores also showed great interest.
5. Small business owners showed a significant increase in the belief about their future security. In 2007, 66% of small businesses felt secure while, the 2008 survey now shows that 77% of respondents possess a feeling of security. This increase of 11% is a positive sign concerning the small business community in Thunder Bay.
6. Respondents have increasing positive perceptions surrounding the performance of the Thunder Bay City Council. Currently, 36% of small business owners feel that City Council does a good job representing their business. Although this may not seem significant it is more than twice the 15% who felt the same way in 2006.
7. Seventy-eight percent (78%) of respondents feel that the OLG Casino is having a negative impact on the city. However, this is down 3% from last year, and 12% since 2006. This indicates a small change in attitude with regard to the OLG Casino, as it slightly improves its negative perception. Despite this slight increase, 43% of respondents still feel the OLG Casino should be closed to improve business conditions for small business owners.

Table of Contents

Executive Summary	i
Research Objective	1
Methodology and Response	1
Respondent Profile	2
Current Small Business Issues	3
1. Respondent Expectations	4
2. Challenges Often Encountered by Businesses	5
3. Importance of Factors to Sales and Revenue	5
4. Importance of Factors for Future Success	6
5. Investing Activities	6
6. Impact of Developments and Institutions	7
Thunder Bay Business Climate	7
7. Anticipated Growth for Thunder Bay	8
8. Focus Development	8
9. Sector Growth Potential	9
10. Meeting Your Needs	9
11. Characteristics That Impeded or Entice Businesses	10
12. Quality of Life for Groups	10
13. Quality of Life Compared to Other Cities	10
14. Population Level	11
15. Security of the Future	11
Development Projects, Your Business and the Community	11
1. City Council	12
2. Bringing New Business to Thunder Bay	12
3. Administrative Requirements	13
4. Thunder Bay Economic Development Commission	13
5. Economic Boom in Other Regions	13
6. Lending Practices of Banks	13
7. Lending Practices of Credit Unions	14
8. Access to Capital	14
9. Impact of the OLG Casino	14
10. Mining Sector	14
11. Marina Park Village	14
12. Closing the OLG	15
13. Forestry Industry	15
14. Thunder Bay Strategic Plan	15
15. Thunder Bay Ventures	16
Selected Respondent Comments:	16
Appendix A - 2008 Thunder Bay Business Opinion Survey	21

Research Objective

As noted in each of the previous ten studies, the objective of this particular study is to examine the attitudes and behaviors of small business in the Thunder Bay Census Metropolitan Area (CMA). The three specific areas of concentration are in: (1) gauging both the attitudes and trends of the small business community with regard to the current and future business climate in Thunder Bay; (2) identifying factors most critical to the development of the City's economy beyond the year 2007, and (3) examining the attitudes of the business community toward specific issues and developments in the local community. The survey also provides respondents with the opportunity to openly comment on any issue they choose.

This approach has led to the development of new questions within subsequent surveys and continues to provide valuable and candid feedback of small business owners' thinking. The principal organization driving this survey is Thunder Bay Ventures; an organization funded by Industry Canada through FedNor, as part of the federal government's Community Futures Development Program. Thunder Bay Ventures has a mandate to conduct research on issues relevant to community economic development, in addition to providing financing and support to small business. The 2008 annual survey was conducted in May and June of this year.

Methodology and Response

The population of study for this research is firms with less than 35 full-time employees, regardless of revenues or type of business activity. This population is also located in the Thunder Bay CMA and has no affiliation with a particular industry sector. Included with the questionnaire was a letter of introduction explaining the purpose of the survey and details of a response incentive. During a three-week data collection period, 700 surveys were delivered with 104 surveys returned (14.86%), which is down 3.74% from last year's response rate of 18.6%.

The survey uses a systematic random sample approach and is delivered through Canada Post. Each survey is addressed to the identified owner of the business. The questionnaire uses a Likert scale (1 to 5) response format as well as categorical response options for assessing frequency and descriptive data (see Appendix A). The questionnaire is 7 pages and has approximately 145 questions. The time estimated to complete the survey was between 10 to 15 minutes.

Respondents are also offered the opportunity to openly express comments regarding significant problems facing their small business. Many of the survey's respondents did provide additional feedback on one or more of the open-ended questions. These responses are simply opinionated comments and do not indicate any statistical significance or trends.

In keeping with accepted statistical practice, an examination of the questionnaire's reliability and numerous validity measures were performed. The inter-item reliability alpha was calculated and found to be in line with acceptable consistency and accuracy thresholds. The research instrument also demonstrates strong internal and external validity. Results provided in this year's survey both typify and reinforce results from previous surveys.

Respondent Profile

Provided in the Respondent Profile section, are general demographic results for the 2008 survey respondents. The percentage results that are provided are from those individuals who responded to the specific questions, therefore excluding those who did not answer the question properly or not at all. Respondent characteristics appear to reflect the small business population and are consistent with characteristics exhibited in previous years

Gender	Percentage
Male	59%
Female	41%

Average Age of Respondent	48 years of age
----------------------------------	-----------------

Average Years in Business	22 years
----------------------------------	----------

Type of Business	Number
Retailers	38
Wholesalers	6
Manufacturing	9
Professional Services	38
Personal Services	12
Other	22

Legal Status of Business	Percentage
Sole Proprietorship	31%
Partnership	10%
Corporations	59%

Categories for Economic Development	Percentage
Women	44%
Aboriginal	2%
Francophone	2%
Youth	7%

Type of Employee	Average Number
Full Time	7
Part Time	4

Change in Employment (2007)	Percentage
Increased	29%
Stayed the Same	62%
Decreased	9%

Actual Sales/Billings (2007)	Percentage
Less than \$25,000	10%
\$25,000 - \$49,999	8%
\$50,000 - \$99,999	14%
\$100,000 - \$249,999	7%
\$250,000 - \$499,999	13%
\$500,000 - \$999,999	17%
\$1 Million - \$5 Million	28%
\$5 Million +	3%

Change in Sales Volume (2006-2007)	Percentage
Increase greater than 10%	27%
Increase greater than 0% and less than 10%	44%
Decrease greater than 0% and less than 10%	15%
Decrease greater than 10%	14%

Change in Actual Sales	2004-2005	2005-2006	2006-2007
Increase	71%	54%	71%
Decrease	29%	46%	27%

Current Small Business Issues

The “Current Small Business Issues” section is focused on understanding the current posture of small business owners given their previous experiences and future expectations. The mean scores are provided in the following tables. Major deviations away from the center (3.00) indicate an area to watch as well as emerging trends in either direction. These results are shaded.

Sales expectations for the fiscal year 2008 are similar to those in the 2007 survey, and are still marginally positive at 66%, which is an increase of 5% from 2007. It should be noted that although 61% of firms expected sales increases for 2007, 71% of firms actually realized these increases; this is a significant improvement from the 54% that realized sales increases from 2005-2006.

Small business demonstrated some inconsistencies with regard to their expected employment levels over the next 12 months as 38% of firms are expecting to hire new employees, which is an increase of 10% from last year. Moreover, layoff expectations have dropped considerably to only 3%. These findings are supported by the increase in annual sales from 2006 - 2007, which is

provided in the Respondent Profile section above.

The concerns of small business owners remained fairly consistent with last year's results, with concerns about fuel and gasoline rates becoming of greater importance to the small business community. It appears that respondents felt that the general economic climate of Thunder Bay was and will remain a significant factor in determining the future success of their business. The survey also shows that small businesses are relatively at ease with their ability to raise capital and secure business loans, as well as any union restrictions, and their access to market research.

The investment intentions of small business owners over the next 12 months remain fairly stable as respondents indicated little to no change in their expected investment activities; however, some minor changes were noted regarding investment in employee compensation and recruitment. While these figures are up slightly from last year, it continues to appear that businesses are investing less in these areas. The same sentiments are expressed by small businesses when the survey inquired about consulting and advertising services in Thunder Bay. Lastly, there is a consistent trend from 2004 onward, which shows that businesses are investing less and less capital each year in their inventory supply.

Numerous developments and institutions are having a positive effect with small business respondents. In keeping with the last several years' results, higher education in the region appears to have the greatest potential for a favourable impact on small businesses as both Lakehead University and Confederation College showed a slight increase in their mean scores. Although the new waterfront development issue has shown a slight decrease from last year, the mean score still indicates that small businesses believe the waterfront development will have a positive impact on their operations. The pulp and paper industry, sawmill production, and the mining industry all showed positive increases, as respondents believe that these three industries will help benefit their small business operations. The mining industry held the strongest belief in terms of how much of a positive impact small businesses believe it will have on their operations. Finally, the impact regarding the OLG Casino on small business has increased slightly compared to last year, as the mean score is now 2.42, up from 2.28 last year. Although this is still a negative score, it indicates that small businesses may be beginning to grow accustomed to the OLG Casino, thus their attitudes are changing.

1. Respondent Expectations

Anticipated Sales Increase For 2008	Percentage
Yes	66%
No	34%

Hiring Expectations (next 12 months)	Percentage
Hiring Additional Employees	38%
Not Hiring Any New Employees	59%
Laying Off Employees	3%

2. Challenges Often Encountered by Businesses

Below is a list of challenges that are often encountered by businesses, please indicate the extent to which the following issues have been a problem for your business in the past 12 months.

Not a Problem (1) – Significant Problem (5)

Issue in Question	2008	2007
Increasing Wage Rates	2.65	2.29
Declining Sales	2.66	2.84
Availability Of Skilled Labour	3.01	2.52
Weather Conditions	2.38	1.92
Raising Capital/Securing Business Loans	2.00	2.11
Increased Competition	2.52	2.46
Access To Market Research	2.12	1.69
Government Paperwork Requirements	2.91	2.63
Municipal Zoning/Building Requirements	1.94	1.86
Access To Advice	2.31	1.79
Union Restrictions	1.53	1.31
Electricity Rates	2.78	2.83
Gasoline and Fuel Oil Rates	3.90	3.63
Taxes	3.49	-

3. Importance of Factors to Sales and Revenue

How important were the following factors to your sales/revenue performance in the 2007 fiscal year?

Not Important (1) – Very Important (5)

Factor in Question	2008	2007
Inventory Price Increases	2.71	2.65
Advertising/Promotions	3.06	3.08
General Economic Climate	3.83	3.93
Change In Product/Service Offerings	2.59	2.46
Staff-Related Issues (Training)	2.66	2.30
Change In Competitive Environment	2.80	2.66
Weather	2.48	2.14
New Markets	2.00	1.82
CDN/US Exchange Rates	2.53	2.32
Fuel/Energy Costs	3.59	3.52
Insurance Rates	3.13	3.25
Cross Border Requirements	2.02	2.13
Gasoline and Fuel Oil Rates	3.63	3.60
Electricity Rates	2.88	3.07

4. Importance of Factors for Future Success

How important do you expect the following factors to be for the future success of your business?

Not Important (1) – Very Important (5)

Factor in Question	2008	2007
Inventory Price Increases	3.05	2.97
Advertising/Promotions	3.27	3.31
General Economic Climate	3.99	4.16
Change In Product/Service Offerings	3.06	2.78
Staff-Related Issues (Training)	2.89	2.54
Change In Competitive Environment	3.20	3.00
Weather	2.49	2.27
New Markets	2.15	2.24
CDN/US Exchange Rates	2.67	2.50
Fuel/Energy Costs	3.80	3.62
Insurance Rates	3.42	3.39
Cross Border Requirements	2.40	2.31

5. Investing Activities

Is your company planning to invest more or less in the following activities over the next 12 months than in the previous year?

Significantly Less (1) – Significantly More (5)

Investment Opportunity	2008	2007	2006	2005	2004
Advertising/Promotion	3.10	3.06	3.16	3.32	3.33
Employee Compensation	2.85	2.64	2.76	2.83	2.82
Employee Recruitment	2.69	2.49	2.71	2.82	2.93
Staff Training Programs	2.82	2.76	2.82	2.92	3.18
Partnering with Other Firms	2.50	2.45	2.63	2.85	2.86
Inventory Supply	2.39	2.56	2.71	2.74	2.83
Capital Projects (eg. Equipment)	2.78	2.67	2.57	2.90	3.03
Market Research	2.40	2.39	2.58	2.76	2.91
Technology	2.84	2.80	2.83	3.23	3.27
Consulting/Advisory Services	2.56	2.36	2.46	2.74	2.79

6. Impact of Developments and Institutions

What kind of impact do you believe the following developments/institutions will have upon your business?

Very Negative (1) – Very Positive (5)

Development/Institution	2008	2007	2006	2005	2004
Electricity Production	2.90	2.91	2.84	2.94	-
Box Store Expansion	2.56	2.61	2.51	2.62	2.63
Gasoline/Fuel Prices	2.32	2.42	2.21	2.20	2.27
Cross Border Requirements	2.66	2.57	2.55	2.91	2.69
Waterfront Development	3.25	3.40	-	-	-
OLG Casino	2.42	2.28	2.18	2.21	2.35
Lakehead University	3.71	3.55	3.71	3.63	3.62
Confederation College	3.60	3.58	3.64	3.63	3.62
Changing Tax Rates	2.99	2.92	3.12	2.62	2.56
Pulp and Paper Industry	3.07	2.44	2.35	2.98	3.19
Local Sawmill Production	3.03	2.44	2.49	2.95	3.13
Energy Rates (Heating, Electricity)	2.65	2.49	2.17	-	-
Mining Industry	3.64	3.20	-	-	-

Thunder Bay Business Climate

The “Thunder Bay Business Climate” section of the survey is presented in an effort to gauge the attitudes of small businesses toward the current and future business climate and economic growth potential for the Thunder Bay CMA. Specific questions regarding new development and institutions and their impact on the Thunder Bay economy, industry sector growth potential, and the City’s ability to meet the needs of small business are discussed.

Sixty percent (60%) of small business respondents believe that the Thunder Bay economy will have negative or no growth over the next year. Although this finding remains pessimistic for the region, it is much better than the 78% from last year and 85% from two years ago. This indicates a positive trend, as small business owners are feeling better about the Thunder Bay economy. It appears that the small businesses believe that the economy has fallen as far as it is going to, and is on track for recovery. The idea that Thunder Bay should focus on and pursue a particular industry or sector is the same as in 2007, as 80% of respondents believe city council and economic developers should concentrate on a particular industry. It appears that small businesses believe that the healthcare and mining industry are lucrative industries which the City of Thunder Bay should explore. Other sectors that small businesses appear interested in are renewable energy, senior services, higher education, tourism, and the biotech industry.

In meeting the needs of small business owners, there are no significant changes from last year. Most small businesses still feel that Thunder Bay does not perform very well with regard to how it meets the needs of their operations. With regard to what might impede or entice a small business to relocate to Thunder Bay, most small businesses felt that the quality of life and

healthcare facilities are prime factors that entice businesses, whereas the weather and the size of the market are two of the main impediments to small businesses relocating to the region.

Quality of life is a topic of interest when Northwestern Ontario is discussed. Responses from small businesses show that the majority of respondents believe that retirees still have the highest quality of life, with a mean score of 3.84. This is down slightly from last year, but is still the leader when compared to the other segments. Mean scores for all groups are above 3.00, which indicate that small businesses reflect positively on the quality of life in Thunder Bay. When comparing Northwestern Ontario with other regions, small businesses have not changed their perception from last year, as 59% still feel that the quality of life in Thunder Bay is better than most other comparable regions. Those that believed the quality of life was the same as most, or not as good as most, remained fairly consistent at 25%, and 16% respectively. However, without a concrete definition of what defines a good quality of life, this is very difficult to measure.

When asked about how the population of Thunder Bay affects the success of small businesses, 82% of respondents believe that the population does affect their success; while 18% believed that population size has no bearing on their business success.

Small business owners showed a significant increase in the belief about their future security and future business interests. As opposed to 2007, when only 66% of small businesses felt secure in their future, the 2008 survey shows that 77% of respondents now possess a feeling of security for the future. This increase of 11% is a positive sign concerning the small business community in Thunder Bay.

7. Anticipated Growth for Thunder Bay

What level of economic growth do you anticipate for Thunder Bay over the next 12 months?

Anticipation of Growth	2008	2007	2006	2005
Decrease in Economic Growth	29%	53%	67%	61%
No Change in Economic Growth	31%	25%	18%	29%
Increase in Economic Growth	40%	22%	15%	10%

*The mean anticipation of growth for 2008 was 3.01, which means that respondents believed there would be no change in the economic growth of Thunder Bay.

8. Focus Development

Do you believe the City of Thunder Bay should pursue the focused development of a particular industry sector? If yes, which one?

Focus Development?	2008	2007	2006	2005
Yes	80%	80%	89%	78%
No	20%	20%	11%	21%

There was no trend amongst the suggested industry sectors received from the survey respondents; however, several business owners would like to see an increased focus within the sectors of tourism, alternative energy, mining and health care industries.

9. Sector Growth Potential

Evaluate the following Thunder Bay industry sectors in terms of growth potential (eg. New markets, new products/services).

None (1) – Great (5)

Sector	2008	2007	2006	2005	2004	2003
Primary – Forestry	2.21	1.63	2.24	2.55	2.55	2.65
Primary – Mining	4.17	3.26	-	-	-	-
Secondary (large manufacturing)	2.48	2.62	2.29	2.37	2.43	2.65
Small Manufacturing	3.08	2.95	2.77	2.80	2.80	3.51
Renewable Energy Production	3.62	-	-	-	-	-
Non-renewable Energy Production	2.30	-	-	-	-	-
Health Care Services	3.98	3.91	3.66	3.33	3.44	3.69
Retailing	2.73	3.11	2.83	2.92	2.90	3.09
Senior Services	3.86	3.52	3.50	3.52	-	-
Financial Services	2.97	2.94	3.03	2.93	3.41	3.07
Higher Education (LU/ConCollege/MedSchool)	3.97	3.95	4.08	3.82	3.44	3.93
Construction Services	2.94	2.90	-	-	-	-
Government Services	2.82	2.98	-	-	-	-
Hospitality/Tourism	3.13	3.58	3.47	3.42	3.36	3.80
Biotech	3.79	-	-	-	-	-
Supplier Network for Boom Elsewhere in Canada	3.11	-	-	-	-	-
Other:						

- The “other” was by one respondent who felt that Aboriginal Services was a sector Thunder Bay should focus on.

10. Meeting Your Needs

How well does Thunder Bay meet the needs of your specific business with respect to the following factors?

Not Very Well (1) – Very Well (5)

Factor	2008	2007
Labour Pool	2.89	2.92
Access to Raw Materials/Natural Resources	2.84	2.97
Weather Response	2.90	2.99
City’s Promotional Efforts	2.40	2.27
Transportation Costs (Passenger)	2.48	2.48
Other Transportation Costs (Shipping)	2.22	2.36
City Infrastructure (Roads, Hydro etc)	2.60	2.43
Municipal Tax Rates	2.26	2.03

City Council Representation/Decisions	2.44	2.35
Access to Financing/Capital	2.79	2.71
Provincial Representation	2.54	2.44
Federal Representation	2.56	2.32

11. Characteristics That Impede or Entice Businesses

In general, to what extent do you believe the following characteristics impede or entice businesses to relocate to Thunder Bay and the surrounding region?

Significant Impediment (1) – Significant Enticement (5)

Characteristic	2008	2007	2006	2005	2004
Awareness of Region and Resources	3.20	3.02	3.07	3.21	3.02
Geographic Location	2.63	2.71	2.48	2.44	-
Weather (perceived or actual)	2.39	2.66	2.41	2.39	2.62
Quality of Life	3.98	3.98	3.76	3.74	3.67
Transportation Facilities (airport etc)	3.21	3.33	3.29	3.18	3.24
Health Care Facilities	3.76	3.82	3.56	3.36	3.38
Economic Opportunity (market size)	2.45	2.56	2.21	2.23	2.36
Input Costs (land, labour, capital)	3.00	2.69	2.45	2.53	-
Technology Infrastructure (broadband)	3.20	3.24	2.94	2.92	3.00
City Government/Policies	2.53	2.35	2.07	2.14	2.27

12. Quality of Life for Groups

In your opinion how attractive is Thunder Bay’s “quality of life” for these groups?

Very Poor (1) – Very Good (5)

Group	2008	2007
Students (all ages)	3.35	3.32
Professionals	3.72	3.72
Skilled Employees	3.52	3.42
Retirees	3.84	4.03
Business Owners	3.10	3.13

13. Quality of Life Compared to Other Cities

In your opinion, as compared to other cities you are familiar with in Canada, how would you describe Thunder Bay’s “quality of life”?

Description	2008	2007
Better Than Most	59%	60%
The Same as Most	25%	24%
Not as Good as Most	16%	16%

14. Population Level

Is the population level of Thunder Bay important to the success of your business?

Response	2008
Yes	82%
No	18%

15. Security of the Future

Do you feel secure about the sustainability of your small business over the next three years?

Response	2008	2007	2006
Yes	77%	66%	68%
No	23%	34%	32%

Development Projects, Your Business and the Community

The last section of the report deals with how the small businesses feel with regard to the local business communities in Thunder Bay. Specifically, it discusses local business stimulus, current local developments and the performance of the Thunder Bay City Council.

The performance of the City Council at representing the small businesses is always a particularly important point and it is up 7% from last year's result of 29%, as 36% of small business respondents believe that City Council does a good job representing their business interests. By the same amount, 36% of respondents feel that Thunder Bay is aggressively trying to persuade new business to come to the region. This is an improvement of 6% from 2007, which indicates a higher positive perception is held with regard to City Council's performance than in the past. However, only 36% of small businesses reported having knowledge of the Economic Development Commission.

Additionally, when comparing the activities of the city government, 33% of respondents felt that the municipal requirements such as zoning, permits and licenses are having an unfavourable effect on their decision to develop new initiatives. This figure is up 5% from last year, and has increased a total of 12% over the past two years.

The Ontario Lottery and Gaming (OLG) Casino continues to be a point of great debate amongst small businesses in Thunder Bay with 78%, a very significant portion, feeling that the OLG Casino is having a negative impact on the city. However, this is down 3% from last year, and 12% since 2006. This indicates a small change in attitude with regard to the OLG Casino, as it slightly improves its negative perception. Split somewhat down the middle, 43% of respondents feel that the OLG Casino should be closed, which is consistent with the majority of people who have the perception that the Casino is having a negative impact of the economy.

Although credit unions continue to enjoy a better image than banks when it comes to their small business lending services, they are down 5% from last year as 66% of respondents feel that the credit unions meet the needs of local business. Banks currently are positively perceived by 37% of respondents who feel they meet the needs of small businesses, which is consistent with the findings from last year. Difficulty in gaining access to capital in order to develop new business

initiatives is up from 26% to 36%, which shows that it has become more difficult for the small business to obtain the needed capital they require to fund their initiatives.

Small business owners are in complete 100% agreement that the mining industry will have a positive impact on the Thunder Bay economy. This sentiment is up 5% from the still astonishing 95% who felt the same way last year. According to the small businesses in Thunder Bay, the economic boom that is taking place in western Canada is not having a positive impact on the city, as only 29% of respondents indicated that they thought the effect was positive.

There were a number of new questions that were included in the 2008 survey. First, 73% of the respondents stated that they support the Marina Park Village as it is currently planned, despite the controversy surrounding this issue. Second, the survey showed that 92% of the respondents felt that the forestry industry was impacting the Thunder Bay economy in some way. It was not specified as to whether or not it was a positive or negative impact, but the majority of respondents felt there was some sort of impact. Third, it appears that the majority of respondents, 70%, were not aware of the Strategic Plan released by the City of Thunder Bay in January of 2008. As well, only 43% of all small business responses indicated that they had an awareness of Thunder Bay Ventures. This indicates that both the city and Thunder Bay Ventures must increase their public awareness amongst the small business community.

1. City Council

Do you believe the Thunder Bay City Council is doing a good job representing your business?

Response	2008	2007	2006
Yes	36%	29%	15%
No	64%	71%	85%

Those respondents who left comments were mainly pessimistic. Comments such as “too focused on the ‘old’ economy” and “too focused on big business” were provided. Furthermore, several comments were offered that have to do with the parking meters downtown, and several business owners wish that council would remove these meters to attract more business. Several comments were provided about offering free 2 hour parking during all days of the week rather than just on weekends.

2. Bringing New Business to Thunder Bay

Do you believe that Thunder Bay is both proactive and aggressive at bringing new business to the region?

Response	2008	2007	2006
Yes	36%	30%	13%
No	64%	70%	87%

Mostly negative comments were received such as “too many rules & regs; also lack of incentives”, and “Too much red tape to get started.” Some positive comments with mixed feelings were also received. “They are looking for opportunities, just having trouble following through”, and “Improving but marketing the city is the key.”

3. Administrative Requirements

Have the administrative requirements of municipal government (zoning, permits, licenses, inspections) adversely affected your decision to develop new business initiatives?

Response	2008	2007	2006
Yes	33%	28%	21%
No	67%	72%	79%

Very mixed comments were received ranging from “most know what they’re getting into in a new venture” to “requirements definitely slowed down or hindered the process – feels like there is no incentive to help the process – i.e. if the business person isn’t pushy and willing to keep pushing one can get bogged down in meeting requirements.”

4. Thunder Bay Economic Development Commission

Are you aware of the Thunder Bay Economic Development Commission?

Response	2008
Yes	36%
No	64%

Mixed opinions were received such as “seems to be mostly rhetoric” to “provides excellent programs”

5. Economic Boom in Other Regions

Do you think the economic Boom in other parts of Canada is having a positive impact on Thunder Bay?

Response	2008	2007
Yes	29%	43%
No	71%	57%

Overall, there was a general consensus of comments about the loss of human capital with the loss of our city’s youth and skilled workers. However, some business owners believe that the money is coming back to Thunder Bay in some way, but “believes we are too far away from the action...”

6. Lending Practices of Banks

Do you believe the lending practices of banks in Thunder Bay are focused on meeting the needs of local businesses?

Response	2008	2007	2006
Yes	37%	36%	34%
No	63%	64%	66%

Extremely pessimistic comments were received such as all the “decisions are made in Toronto, no concept of Thunder Bay climate”, and “main concerns are meeting their targets”

7. Lending Practices of Credit Unions

Do you believe the lending practices of credit unions in Thunder Bay are focused on meeting the needs of local businesses?

Response	2008	2007	2006
Yes	66%	71%	68%
No	34%	29%	32%

Many business owners mentioned that they were not very knowledgeable about the credit unions; however, the ones that were seemed satisfied and felt they were “much easier to deal with – no head office to deal with. More personal”, and “I think they are well positioned to fill the niche the banks are not filling.”

8. Access to Capital

Has the ability to access capital affected your decision to develop new business initiatives?

Response	2008	2007	2006
Yes	36%	26%	35%
No	64%	74%	65%

Several respondents said they obtained their own personal financing.

9. Impact of the OLG Casino

What impact do you believe Thunder Bay’s OLG Casino is having on the Thunder Bay economy?

Response	2008	2007	2006
Positive	22%	19%	10%
Negative	78%	81%	90%

Mostly negative comments were received such as “money leaving Thunder Bay” and “taking too much out of \$ that can be spent elsewhere, instead of people losing savings & gambling habit.” However, there were also some positive attitudes shared such as “creates employment” and “keeps some revenue in Thunder Bay even with a small percentage.”

10. Mining Sector

Do you believe that the mining sector is having a positive impact on the Thunder Bay economy?

Response	2008	2007
Yes	100%	95%
No	0%	5%

Very positive comments all around were received such as “provides long term full time employment providing a viable realistic wage “ and “money will filter back into Thunder Bay.”

11. Marina Park Village

Do you support the City's Marina Park Village at the Waterfront as planned?

Response	2008
Yes	73%
No	27%

There were many mixed opinions received, as there is some skepticism about the future vision and strategy of the waterfront development plan. However, many positive beliefs about an increase in tourism do exist. There are some negative opinions that are opposing the skateboard park and condominium development, as they are not "fully inclusive to the general public."

12. Closing the OLG

Do you believe Thunder Bay's OLG Casino should be closed?

Response	2008	2007	2006
Yes	43%	69%	55%
No	57%	31%	45%

Several mixed opinions were received, while many respondents believed that closing the casino would not solve any of the city's social problems as people would go elsewhere to gamble and "leave another empty building in the downtown core." However, some respondents believed that closing the OLG Casino would keep more money in the city as its "promised benefits have yet to materialize."

13. Forestry Industry

Do you think the forestry industry is having an impact on our present economy?

Response	2008
Yes	92%
No	8%

A strong belief exists that the forestry industry does indeed affect Thunder Bay; however, some respondents believed that "it has contributed to the higher unemployment rates", which forces people to leave Thunder Bay, and that the industry is "already too far gone to be revived."

14. Thunder Bay Strategic Plan

Are you aware of the City of Thunder Bay's new strategic plan released January 2008?

Response	2008
Yes	30%
No	70%

Respondents expressed very few opinions about the City of Thunder Bay’s new strategic plan, though mixed comments were received such as “it’s a start towards long term goals” and the city provides “poor communication”

15. Thunder Bay Ventures

Are you aware of the activities of Thunder Bay Ventures?

Response	2008
Yes	43%
No	57%

Only a few responses were received and with mixed opinions ranging from “they should be doing a better job and working more with groups that really do something positive for the region. Bad reputation for helping small business.” To the other end of the spectrum, which is “you do a lot for women in business (PARO) – thank you.”

Selected Respondent Comments:

What is the most significant problem for your small business?

We moved here to launch and grow a family business because of the beauty of the area and the quality of life for our family. TB is a great place to grow a national business. There’s still too much ‘old economy’ focus here. Too much rhetoric about business support when it’s only really for mill-scale operations. Need real support – real money – for the backbone of Thunder Bay’s economy – small and medium sized businesses. (non-aboriginal as there is LOTS of grant money for aboriginal business)

We have seen the last three years of declining retail sales. This year has to improve or I will be closing two stores. The retail climate of this area has changed dramatically in the last 5 years. Cannot pinpoint one reason but could be the economy of our area. – aging population, loss of higher paying jobs or many other reasons. The increase in minimum wage has also hit us negatively VERY HARD.

I wish there was more funding available for small business to expand, re grants etc. to buy equipment, etc.

Lack of access to markets, cost of marketing and advertising. Location is an ongoing challenge because of cost control and physical surrounding environments. It is not good for retail business to have a meth clinic and shelter house so close. If the present city administration want to build retail in Thunder Bay they have to have a planning dept, free parking and a good advertising and tourist attraction plan. When the major employers and businesses close a wage then long term employment also goes yet retailers have the same costs but no one with funds to buy their products. Observing city hall dealing with business and economic plans they seem to please a few if any – i.e. the marina development, truck stop, school locations and closings. I understand the concept of not being able to please everyone all the time but my perception is that our city admin does not seem to please anyone most of the time. They do not consult with local business, pay little attention in promoting the City outside of the town boundaries. They have concentrated on increasing employment in medical research but little in quality employment for the average

resident. Before planning the marina, they should have directed, political or financial resources into Big Thunder and expanding existing events. This would give people a reason to come to Thunder Bay. Having a marina won't entice people to the city. Our nearest market is Minnesota and yet I have met people who are not aware that we have a theatre, orchestra, talented artisans or even our local fall fairs. Last year Rock the Fort was cancelled but City Hall should have recognized the economic benefits and found a way to have it go on in a temporary location. The other negative issue with TB is the high crime rate – higher than Toronto. Why and what is being done? The city is going to spend millions on a marina but will be another public space they won't be able to police. It's already unsafe to walk through the walking trails by McVicar Creek and the marina will be an extension of this. We need planning, promotion, consultation and execution to promote a healthy downtown retail experience or go to Grand Marais!

Even with price of gas – I strongly believe in the tourism potential of Thunder Bay. We have so much to offer – but we need lots of help from the 2 senior levels of government. The Lake Superior Circle route in my opinion is second to none. But we require better highways and roadside rests. So much potential!

Creative projects – (intercultural village) – streetcar route from one end of city to another – Thunder Bay does not start or stop at official boundaries of city (as exemplified in this survey) Encourage air routes to other places direct. Bring back the train.

Tired of hearing about how great our hospital is and how much employment it provides. Bottom line is it is not big enough – not enough beds! Need more tourism draws – ie snowmobile trails in the city – to the USA – also numerous attempts to reopen a dirt track racing facility have failed. There is lots of potential tourist draw here. Ski hills and Big Thunder reopen would help. Get sawmills and pulp/paper jobs back – our industrial service sector has shrunk about 50% in the last 10 years (regionally).

Clean up this town! Outsiders/visitors comment on 'how dirty Thunder Bay is' – grass, bulrushes grow alongside of major arteries. Empty and boarded up buildings everywhere.

I feel that the two biggest challenges in northern Ontario is the tax burden. Our PST is complicated and little of the proceeds goes to help Northern Ontario. Thunder Bay has one of the highest property taxes in Ontario thus providing greater costs to a Thunder Bay Business making it harder to go into other geographical areas. The high tax burdens also make it competitive for Manitoba businesses to compete in the Thunder Bay economy, allowing more money to leave the province.

I am one of the artists in the North Core. My business is comparatively insignificant, however, I am one facet in a group that contributes to Thunder Bay's culture. We need leadership to make our city a more attractive place to live. Good Luck with your efforts.

We need free on street parking in downtown and Bay & Algoma Area. That would increase people stopping to shop. Employee parking lots – off the street would keep streets free for customers. That is the attraction for malls and box stores.

Thunder Bay is dying. More businesses are forced to outsource. Shrinking middle class; more poverty. More racism, more dispossessed ethnic groups. Therefore, businesses are reluctant to locate in TB.

We are fortunate that our target demographic is a primarily female baby boomer. This demographic is relatively stable in this city so we are enjoying a comfortable increase in business thus far in 2008. This does not make it easy to exploit the market. New products and strategies have to be applied to keep on top of the challenges facing all retailers especially in non-essential industry such as retail giftware.

My business needs street traffic. Malls are my handicap. The Casino around the corner doesn't help my business! Who wants to shop in an area with gambling addicts looking at their purse when they walk by. Casino client can't afford to eat in the nice restaurants in the downtown core. These unfriendly people unnerve me. I no longer feel safe in my own city. Twice this winter I've heard gunshots at 2 am – what are we not being told! (I live on College St)I take pride in the large artist community our cleaner air and good drinking water, beautiful parks and natural beauty with lovely hiking parks all the things families and seniors are looking for. The mentality is to bring industry to this city to destroy you good assets. I ask why? A mind shift is needed by council & government. Stricter enforcement of DOG POO please! Good Luck!

I believe our government is negatively affecting the automobile business in Canada. Instead of supporting our dealers they are encouraging Canadians to buy vehicles out of the country. They are promoting out sales and our dealers are finding it extremely difficult to compete. There is a government website established to show people how to buy American and how easy it is.

Professional businesses in downtown core are subject to the fear of customers in simply walking down the streets. There are problems with people with obvious mental issues on the street. There are people bothering customers by harassing them. My staff does not want to work after 5 p.m. for fear of people in area. There is activity in lanes typical of the worst slums. The value of buildings has decreased to almost zero, but the tax rates have not adjusted in response. The closing of high schools and public schools close to the downtown is short sighted. The moving of hospitals from downtown is also short sighted. There needs to be a visible police presence on foot 24 hours/day. Our Business suffered a break-in in the past year and will likely suffer more of them. We need a tax holiday downtown, removal of meters, programs to encourage businesses to return to core. We need to encourage occupancy of derelict buildings or tear them down. Finding new employees who are 'interested in working and know how to act professionally is getting extremely difficult. Our service sector is growing and it is more and more difficult to find employees to fill the available positions.

Advertising is extremely expensive so I can do very little other than Internet. I prefer to do it locally, however, I am not able to afford to do this. PARO is most helpful and supportive. My business partners with others for word of mouth advertising, events, and support.

The most significant challenge is obtaining capital for growth – now that the banks are in turmoil because of the sub prime debacle south of us it has impeded normal wisdom of our banks. Our company has secured the dealership to the #1 manufacturer of product in our industry in the world. Now lets grow locally. We are very bullish on Thunder Bay, I see many areas for growth.

Glad someone is taking the time to ask small businesses how they feel

Re #2 A significant challenge for small business owners is not on your list. Please consider adding 'personal circumstances' to the choices for next year's survey. Even in a hot thriving

economy, a small business can fail when health declines, family caregiver stress occurs or challenges with children.

Our firm provides multi discipline engineering and architectural services. Last year was probably the most successful in the past 30 years. We have adapted to new economic realities in this region – both negative (pulp & paper) and positive (mining). The opportunities in the P&P sector has focused on energy cost reduction, an area in which our firm has expertise – thus we have been working within the P&P industry as they focus on reducing these costs. At the same time, we are diversified enough that we can ‘weather’ downturns in each sector. Mining is ‘HOT’ – we have a number of large mining projects in house, with Western Canada, the USA and Ontario. Highway infrastructure work is another sector of a business that is a strong performer. We have also moved into the First Nations market for engineering/architecture project management services and this is building. We now employ the equivalent of 75 personnel annually all of who are full time employees. It appears that this year will mirror last year’s success. Our biggest issue is the availability of experienced engineering/architectural personnel. We have to decline opportunities to propose work because we do not have sufficient resources to support it. Our services/business (for the most part) transfers wealth from other parts of Canada and the US to Thunder Bay, where it is distributed in terms of salaries and purchased supplies. As a locally owned firm, the majority of this revenue becomes part of the local economy. (not withstanding taxes).

As a local downtown North business there are several areas of contention. One is parking – should be 2 hour free for customers.

Two is policing – more visibility on street and quicker response time

Three is street cleaning starting in April, not middle of May. Cigarette butts are disgusting.

In the winter – clear off the snow banks in front of businesses.

Consumers must be educated about the cost of doing business in Canada and all the benefits of the higher cost and higher taxes and not compare it to the cost in the USA. We have a lot better standard of life and we do make a lot more money than most of them and we do not have to pay 500-800/month health care, if you can afford it.

People from TB need to understand the money spent in the USA will never return to Canada and they are hurting retailers themselves, their family and the tax base of their city.

Out shopping is one of the largest problems our retail community has which effects everyone in Thunder Bay.

Why is it that the first act of the new council was to take a group of twelve including the overpaid police chief, to a useless and all expense paid trip to China? This resulted in ZERO benefit to our citizens but perfectly summed up the priorities of the mayor and council.

As the owner of a small B&B, we see the upcoming year as the ‘perfect storm’ for our business. High fuel costs will slow down travel by car for Canadians and Americans. The high Canadian dollar will discourage American tourists. Also ridiculous rules for Americans crossing the border, in particular turning back Americans who have had a drunk driving charge is absurd! We

have to get back to 'welcoming' people to our county rather than treating them like criminals who we may or may not let into our country. We should have huge signs at the border saying WELCOME to our American Friends! And all service industries should make all tourists feel appreciated and welcomed to our community. Follow the example of great promoters like WestJet who often thank their passengers for choosing them. They say "We know you could choose other carriers and we thank you for choosing us". In other words, we have to let tourists know how much we appreciate them choosing us.

Obtaining investment for growth

I like many other TB business people have developed business in Toronto and commute as required. Transportation is great. TB is great for lifestyle.

The consumers of Thunder Bay are not spending as much as they used to. When they do they are looking for the best price possible. If that happens to be in the US, then that is where they buy. Our Canadian social benefit package needs to be funded either directly or indirectly through consumer purchases and taxes. With sales falling, businesses closing, this will be much harder to fund as we have in the past. Why are we paying at times 40% to 500% more for the same exact products than in the US. Many are products we produce here in Canada. It not always the retailer's responsibility as one Finance Minister has stated. Some time too many layers of distribution or higher import taxes on the goods we import – footwear is 10% to 12% higher in Canada than the US. That could cost the consumer 20% more at the sales desk. Our government protects a footwear industry that does not exist in this country anymore.

Big box stores are putting Grocery Stores, landscape/bedding out plants stores, tire dealerships, etc....out of business. All the money is being funneled to the US 'head offices'. I can not compete with these super entities and support myself and community by selling my products.

Thunder Bay Ventures is not assisting the development of new economy (knowledge based) and biotech service industry to the extent that it is expected to perform. Thunder Bay Ventures should support Biotech Services Industry as much as it supports R&D.

I love living here but still need a rising population that will contribute to local economy and standard of living. More professional → more decentralization of government to our area. The world does not end in North Bay.

Finding tradesmen, individuals mechanically inclined.

Initial capital to get started. No one wants to help you. Government wants entrepreneurs and new small businesses but the banks won't lend to you if you can't provide records of 3-5 years profit. No way to expand unless you're already rich.

Keep doing this report. Try to ask questions that are relevant to the target you serve – small business.

Tackle some policy issues – recommend policy to impact change coming out of the comments put forward.

Appendix A - 2008 Thunder Bay Business Opinion Survey

The following survey will take a few minutes to complete and your willingness to take the time to share your opinions is greatly appreciated. Specifically, the survey captures the attitudes of Thunder Bay small business owners about issues that affect their business and the local economy. To learn more about this survey please contact the representative at 344-9208.

Section A: You and Your Business

1. Gender: Male Female
2. Your age: _____
3. How many years has this firm been in business? _____
4. Your business is... Retail Manufacturing Personal Services
 Wholesale Professional Services Other _____
5. Postal code: _____
6. Legal status of business Sole Proprietor Partnership Corporation
7. Industry Canada targets the following categories for economic development. Please indicate any of the following that apply to the ownership of your business.
 Woman
 Aboriginal
 Francophone
 Youth (under 30)
8. How many people are currently employed at your firm? full-time _____ part-time _____
9. What change in the total employment level of your firm occurred during the **2007** fiscal year?
 Increased
 Remained the same
 Decreased
10. What are your current hiring expectations for the next 12 months?
 Planning to hire additional employees
 Planning not to hire any additional employees
 Planning to layoff employees
11. Which of the following best represents your actual sales or billings for the **2007** fiscal year?
 less than \$25,000 \$100,000 - \$249,999 \$1,000,000 - \$5,000,000
 \$25,000 - \$49,999 \$250,000 - \$499,999 greater than \$5,000,000
 \$50,000 - \$99,999 \$500,000 - \$999,999
12. Does this **2007** sales volume represent an increase or decrease over your 2005 sales?
 increase greater than 10%
 increase greater than 0 and less than 10%
 decrease greater than 0 and less than 10%
 decrease greater than 10%

13. Do you anticipate an annual sales increase for the **2008** fiscal year?

- yes
no

14. Below is a list of problems often encountered by businesses, please indicate the extent to which the following issues have been a problem for your business in the past 12 months.

Problem	Not A		Significant		
		Challenge			
a) Increasing wage rates	1	2	3	4	5
b) Declining sales	1	2	3	4	5
c) Availability of skilled employees	1	2	3	4	5
d) Weather conditions	1	2	3	4	5
e) Raising Capital/Securing business loans	1	2	3	4	5
f) Increased competition	1	2	3	4	5
g) Access to market research, business advice	1	2	3	4	5
h) Government paperwork requirements	1	2	3	4	5
i) Municipal zoning/building requirements	1	2	3	4	5
j) CDN/US exchange rate	1	2	3	4	5
k) Union restrictions	1	2	3	4	5
l) Electricity rates	1	2	3	4	5
m) Gasoline and fuel oil rates	1	2	3	4	5
n) Taxes	1	2	3	4	5

15. How important were the following factors to your sales performance in the **2007** fiscal year?

	Not			Very	
	Important			Important	
a) Inventory price increases	1	2	3	4	5
b) Advertising/promotion	1	2	3	4	5
c) General economic climate	1	2	3	4	5
d) Change in product/service offering	1	2	3	4	5
e) Staff-related issues (e.g., training)	1	2	3	4	5
f) Change in competitive environment	1	2	3	4	5
g) Weather	1	2	3	4	5
h) New markets (e.g., exports)	1	2	3	4	5
i) CDN - U.S. exchange rate	1	2	3	4	5
j) Fuel /Energy costs	1	2	3	4	5
k) Insurance rates	1	2	3	4	5
l) Cross border requirements	1	2	3	4	5
m) Gasoline and fuel oil rates	1	2	3	4	5
n) Electricity rates	1	2	3	4	5

16. How important do you expect each of the following factors to be for the future success of your business?

	Not Important			Very Important		
a) Inventory price increases	1	2	3	4	5	
b) Advertising/promotion	1	2	3	4	5	
c) General economic climate	1	2	3	4	5	
d) Change in product/service offering	1	2	3	4	5	
e) Staff-related issues (e.g., training)	1	2	3	4	5	
f) Change in competitive environment	1	2	3	4	5	
g) Weather	1	2	3	4	5	
h) New markets (e.g., exports)	1	2	3	4	5	
i) CDN - U.S. exchange rate	1	2	3	4	5	
j) Fuel/Energy costs	1	2	3	4	5	
k) Insurance rates	1	2	3	4	5	
j) U.S. border restrictions	1	2	3	4	5	

17. Is your company planning to invest more or less in the following activities over the next 12 months than in the previous year?

	Significantly Less			Significantly More		
a) advertising/promotion	1	2	3	4	5	
b) employee compensation	1	2	3	4	5	
c) employee recruitment	1	2	3	4	5	
d) staff training programs	1	2	3	4	5	
e) partnering with other firms	1	2	3	4	5	
f) inventory supply	1	2	3	4	5	
g) capital projects (e.g, equipment)	1	2	3	4	5	
h) market research	1	2	3	4	5	
i) technology	1	2	3	4	5	
j) consulting/advisory service(s)	1	2	3	4	5	

18. What kind of impact do you believe the following developments/institutions will have upon your business

	Very Negative			Very Positive		
a) Electricity Production	1	2	3	4	5	
b) Box Store Expansion	1	2	3	4	5	
c) Gasoline/Fuel prices	1	2	3	4	5	
d) Cross Border Security	1	2	3	4	5	
e) Waterfront Development	1	2	3	4	5	
f) OLG Casino	1	2	3	4	5	
g) Lakehead University	1	2	3	4	5	
h)Confederation College	1	2	3	4	5	
i) Changing Tax Rates	1	2	3	4	5	
j) Pulp/Paper Industry	1	2	3	4	5	
k) Local Sawmill Production	1	2	3	4	5	
l) Electricity rates	1	2	3	4	5	
m) Mining Industry	1	2	3	4	5	

Section B: Thunder Bay Business Climate

1. What level of economic growth do you anticipate for Thunder Bay over the next 12 months?

Significant Decrease	Moderate Decrease	No Change	Moderate Increase	Significant Increase
1	2	3	4	5

2. Do you feel secure about the sustainability of your small business over the next three years?

yes no

3. Evaluate the following Thunder Bay industry sectors in terms of growth potential (e.g., new markets, new products/services).

	None		Great		
a) Primary-Logging	1	2	3	4	5
b) Primary-Mining	1	2	3	4	5
c) Secondary (e.g., large manufacturing)	1	2	3	4	5
d) Small Manufacturing	1	2	3	4	5
e) Renewable Energy Production (wind, solar etc.)	1	2	3	4	5
f) Non-renewable Energy Production (fossil fuel)	1	2	3	4	5
g) Health Care Services	1	2	3	4	5
h) Retailing	1	2	3	4	5
i) Senior Services	1	2	3	4	5
j) Financial Services	1	2	3	4	5
k) Higher Education, LU/ConCollege/Med School	1	2	3	4	5
l) Construction Services	1	2	3	4	5
m) Government Services	1	2	3	4	5
n) Hospitality / Tourism	1	2	3	4	5
o) Biotech	1	2	3	4	5
p) Supplier Network for boom elsewhere in Canada	1	2	3	4	5
q) Other:	1	2	3	4	5

4. How well does Thunder Bay meet the needs of your specific business with respect to the following factors?

	Not Very Well		Very Well		
a) Labour pool (education, availability, skill)	1	2	3	4	5
b) Access to raw materials/natural resources	1	2	3	4	5
c) Weather response	1	2	3	4	5
d) City's promotional efforts	1	2	3	4	5
e) Transportation costs (passenger)	1	2	3	4	5
f) Other transportation costs (shipping)	1	2	3	4	5
g) City infrastructure (e.g., roads, hydro, gas)	1	2	3	4	5
h) Municipal tax rates	1	2	3	4	5
i) City Council representation/decisions	1	2	3	4	5
j) Access to financing/capital	1	2	3	4	5
k) Provincial representation	1	2	3	4	5
l) Federal representation	1	2	3	4	5

5. Do you believe the City of Thunder Bay should pursue the focused development of a particular industry sector? If yes, which one of those mentioned above, or another?

- yes - _____
no

6. In general, to what extent do you believe the following characteristics impede or entice businesses to relocate to Thunder Bay and the surrounding region?

	Significant Impediment			Significant Enticement	
a) Awareness of the region and its resources	1	2	3	4	5
b) Geographic location	1	2	3	4	5
c) Weather (i.e., perceived or actual)	1	2	3	4	5
d) Quality of life	1	2	3	4	5
e) Transportation facilities (e.g., airport)	1	2	3	4	5
f) Health care facilities	1	2	3	4	5
g) Economic opportunity (market size)	1	2	3	4	5
h) Input costs (land, labour , capital)	1	2	3	4	5
i) Technology Infrastructure (e.g., broadband)	1	2	3	4	5
j) City Government/policies	1	2	3	4	5

7. In your opinion, how attractive is Thunder Bay’s “quality of life” for these groups?

	Very Poor			Very Good	
a) students (all ages)	1	2	3	4	5
b) professionals	1	2	3	4	5
c) skilled employees	1	2	3	4	5
d) retirees	1	2	3	4	5
e) business owners	1	2	3	4	5

8. In your opinion, as compared to other cities you are familiar with in Canada, how would you describe Thunder Bay’s quality of life?

- better than most
the same as most
not as good as most

9. Is the population level of Thunder Bay important to the success of your business?

- yes
no

Section C: Development Projects, Your Business and the Community

(Why/Why Not responses are optional in the following questions)

1. Do you believe the Thunder Bay City Council is doing a good job representing your business?

- yes
no

Why/Why Not? _____

2. Do you believe that Thunder Bay is both proactive and aggressive at bringing new businesses to the region?

yes

no

Why/Why Not? _____

3. Have the administrative requirements of municipal government (zoning, permits, licenses, inspections) adversely affected your decision to develop new business initiatives?

yes

no

Why/Why Not? _____

4. Do you believe that the new Economic Development Commission will have a positive effect on the economy of Thunder Bay?

yes

no

Why/Why Not? _____

5. Do you think that the economic Boom in other parts of Canada is having a positive impact on Thunder Bay?

yes

no

Why/Why Not? _____

6. Do you believe the lending practices of banks in Thunder Bay are focused on meeting the needs of local business?

yes

no

Why/Why Not? _____

7. Do you believe the lending practices of credit unions in Thunder Bay are focused on meeting the needs of local business?

yes

no

Why/Why Not? _____

8. Has an inability to access capital affected your decision to develop new business initiatives?

yes

no

Other Sources utilized? _____

9. What impact do you believe Thunder Bay's OLG Casino is having on the Thunder Bay economy?

positive

negative

Why/Why Not? _____

10. Do you believe that the mining sector is having a positive impact on the Thunder Bay economy?

yes

no

Why/Why Not? _____

11. Do you support the City's Marina Park Village at the Waterfront as planned?

yes

no

Why/Why Not? _____

12. Do you believe Thunder Bay's OLG Casino should be closed?

yes

no

Why/Why Not? _____

13. Do you think the Forestry industry is having any impact on our present economy in Thunder Bay?

yes

no

14. Are you aware of the City of Thunder Bay's new strategic plan released January, 2008

yes

no

Why/Why Not? _____

15. Are you aware of the activities of Thunder Bay Ventures?

yes

no

Why/Why Not? _____

Please provide any comments you wish in the space below and overleaf:

Thank you for your time, it is greatly appreciated!