2012 Thunder Bay Small Business Opinion Survey

June 2012

15th 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 "2012 Thunder Bay Business Opinion Survey" marks the fifteenth 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 survey presented findings in several key areas that should be noted:

1. Hiring expectations for the next 12 months have decreased in comparison to last year's results, with 49% of firms planning to hire additional employees, down from 51% in 2011. 51% of firms are not planning to hire additional employees, and 0% of firms are planning to lay off employees. The employment trends in the last five years indicate that the number of firms planning to expand is increasing. It is important to note that firms currently have an average of 6 full time workers and 4 part timers.

2. 74% of respondents feel that economic growth in Thunder Bay is positive. There has been a significant trend in the past four years indicating that small business owners are more confident that the economy is on its track to recovery. In 2009 only 28% of respondents had optimistic thoughts in regards to economic growth, and over the past three years it has continually increased to its peak percentage of 74% in the current year.

3. The belief that the mining industry is having a positive impact on Thunder Bay's economy has remained consistently strong over the past three years. Thunder Bay's small business owners gave mining a score of 3.85 out of 5, ranking it as the most important industry sector. Mining is also ranked very high in regards to its importance to the future of Thunder Bay, while respondents feel that forestry is not important to the future of our economy. The OLG Casino has a steady score of 2.45, indicating that business owners still have negative thoughts towards the impact of the casino. The score of the waterfront development has increased significantly since last year, from 2.99 to 3.55, indicating that small business owners are gaining faith in the benefits of this process.

4. Small business owners showed a significant increase in their feelings towards future security. In 2011, 83% of small businesses possessed a feeling of security, while the 2012 survey saw that number increase to 85%. This increase shows a strong positive trend since 2005. This should be monitored closely in the future to determine what affect the current conditions are having on small businesses.

5. Respondents' perceptions in regards to the City of Thunder Bay meeting their needs are not positive. Almost every factor that was questioned has dropped from last year's results, all the results are below the midpoint of three. This indicates that the City of Thunder Bay is not meeting the needs of Thunder Bay's small business owners.

6. Small business owners seem to have a reached a common opinion that raising taxes in the short-term to eliminate the deficits at a faster pace is not a good idea. 69% of respondents feel negatively about this idea, which is following a trend in comparison with the previous year's results. However, this is a significant drop from the 87% in 2011.

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Research Objectives

It is time once again to offer the results of this year's Thunder Bay Business Opinion Survey. The objective of this study is to examine the attitudes and behaviours of small businesses 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 2012, 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 study is conducted under the auspices of 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 businesses. The 2012 annual survey was conducted in May and June of this year.

Methodology and Response

The specific population studied for this research is primarily firms with less than 35 full-time employees, regardless of revenues or types of business activity. The population is 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 a response incentive. During a 3-week data collection period, the surveys were mailed to 700 small business, with 103 surveys returned (14.71%), which is up 1.42% from last year's response rate of 13.29%.

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 survey is 8 pages and has approximately 150 questions. Respondents are also offered the opportunity to openly express opinions regarding Thunder Bay's economy. Many respondents did provide additional feedback on one or more of the open-ended questions in section B as well as section C. A random selection of the comments is provided in the report. These responses are opinionated comments and do not present any significance or trend.

In keeping with statistical practice, an examination of the questionnaire's reliability and numerous validity measures were performed.

Respondent Profile

Provided in the Respondent Profile section is general demographic results for the 2012 survey respondents. The percentage results that are provided are from those individuals who responded to the specific questions, therefore excluding those who did not respond to the question properly or failed to respond at all. Respondent characteristics appear to reflect the small business population and are consistent with characteristics exhibited in previous years.

Table 1

Gender	Percentage
Male	61%
Female	39%

Table 2

Average Age of Respondent	50

Table 3

Average Years in Business	19.28

Table 4

Type of Business	Number
Retail	52
Wholesale	3
Manufacturing	4
Professional Services	17
Personal Services	11
Other	14

Table 5

Legal Status of Business	Percentage
Sole Proprietorship	35%
Partnership	12%
Corporation	53%

Table 6

Education Level of Owner	Percentage
High School	20%
College	34%
University	46%

Table 7

Categories for Economic Development	Percentage
Women	66%
Aboriginal	11%
Francophone	8%
Youth (under 30)	15%

Table 8

Type of Employee	Average Number	Maximum	Minimum
Full Time	6	85	0
Part Time	4	40	0

Table 9

Change in Employment (2012 Fiscal Year)	Percentage
Increased	27%
Remained the Same	62%
Decreased	11%

Table 10

Actual Sales/Billings (2012 Fiscal Year)	Percentage
Less than $25,000	8%
$25,000 - $49,999	3%
$50,000 - $99,999	10%
$100,000 - $249,999	15%
$250,000 - $499,999	15%
$500,000 - $999,999	16%
$1 Million - $5 Million	25%
$5 Million +	8%

Table 11

Change in Sales Volume (2011-2012)	**Percentage**
Increase greater than 10%	51%
Increase greater than 0% and less than 10%	28%
Decrease greater than 0% and less than 10%	11%
Decrease greater than 10%	10%

Current Small Business Issues

The "Current Small Business Attitudes" 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 that this factor is an area to watch as well as a possible emerging trend in either direction. These results are shaded.

The following table depicts the shading legend used throughout the report.

Large Deviation From the Mean	
Significant Change From 2011	

1. Respondent Expectations

Table 13

Anticipated Sales Increase For 2012	**Percentage**
Yes	69%
No	31%

Small business owners appear to be rather positive in terms of sales increases, as 69% of respondents feel that their sales will increase in the next fiscal year, this is up 6% from the previous year, where only 63% of respondents felt positive about anticipated sales increase.

Table 14

Hiring Expectations (next 12 months)	**Percentage**
Hiring Additional Employees	49%
Not Hiring Any New Employees	51%
Laying Off Employees	0%

Hiring expectations for the next twelve months have changed slightly as 49% of businesses are expecting to hire additional employees, down from 51% in 2011 (Table 14). It is also important to note that although 51% of firms expected to hire additional employees in 2011 only 27% actually did (Table 9). Layoff expectations for the next twelve months are 0%, the same as 2011 (Table 14). Those firms that are planning to hire additional employees in 2011 employ on average 8 full time employees and 6 part time employees. Figure 1 on the following page shows the changes in hiring expectations over the past three years.

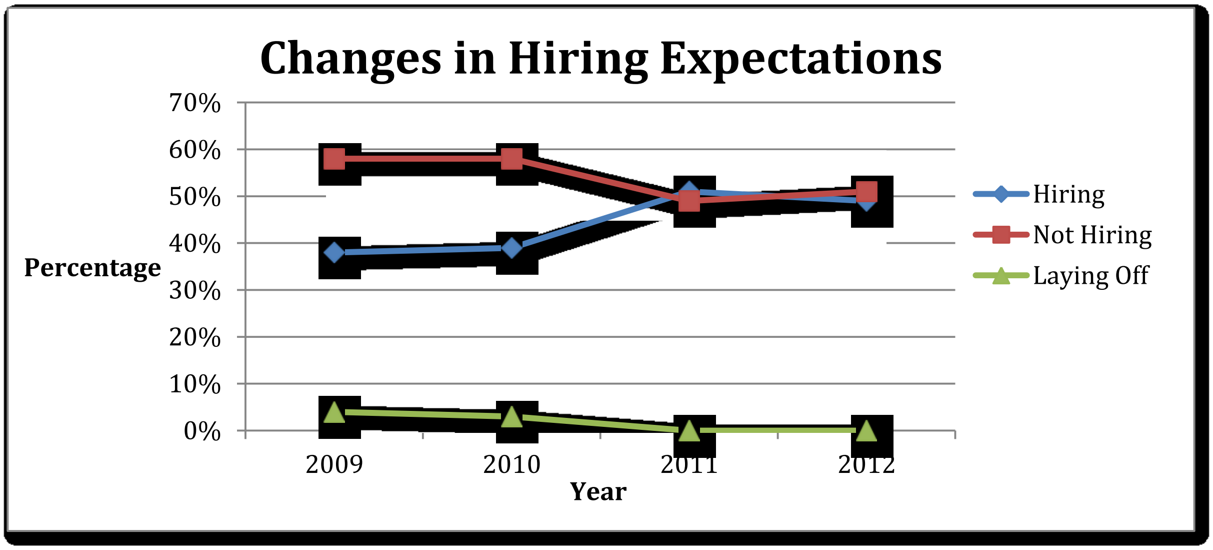

Figure 1

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 Challenge (5)

Table 15

Issue in Question	2012	2011	2010	2009
Increasing Wage Rates	2.64	-	-	-
Declining Sales	2.45	2.48	2.86	2.89
Availability Of Skilled Labour	3.08	2.79	2.86	2.59
Weather Conditions	2.10	2.16	2.18	2.21
Raising Capital/Securing Business Loans	2.13	2.10	1.96	2.16
Increased Competition	2.52	2.66	2.82	2.53
Access To Market Research, Business Advice	2.01	1.97	1.86	2.17
Government Paperwork Requirements	2.82	2.94	3.00	2.88
Municipal Zoning/Building Requirements	2.07	2.14	2.07	1.97
CDN/US Exchange Rate	2.01	2.04	2.15	2.54
Union Restrictions	1.33	1.39	1.32	1.27
Electricity Rates	2.66	3.11	2.70	2.64
Gasoline and Fuel Rates	3.41	3.70	3.33	3.19
Taxes	3.28	3.56	3.64	3.36
Your Business Location in the City	1.92	-	-	-

The concern of small business over raising capital/securing business loans, access to market research, and business advice has increased somewhat in comparison to last year's results (Table 15). Gasoline and fuel rates, availability of skilled labour, and taxes appear to be the biggest concern of small business owners, while union restrictions is the least of their concerns.

3. Importance of Factors to Sales and Revenue

How important were the following factors to your sales/revenue performance to the 2011 fiscal year?

Not Important (1)
Very Important (5)

Table 16

Factor in Question	**2012**	**2011**	**2010**
Inventory Price Increases	2.68	2.89	2.79
Advertising/Promotion	3.02	3.04	2.86
General Economic Climate	3.37	3.68	3.86
Change In Product/Service Offering	2.56	2.65	2.32
Staff-Related Issues (e.g., Training)	2.66	2.36	2.46
Change In Competitive Environment	2.75	2.79	2.97
Weather	2.15	2.18	2.18
New Markets (e.g., Exports)	1.81	1.89	1.71
CDN/U.S. Exchange Rate	2.26	2.34	2.16
Insurance Rates	2.93	2.91	2.77
Cross Border Requirements	2.20	2.20	1.96
Gasoline and Fuel Rates	3.31	3.64	3.28
Electricity Rates	2.82	3.35	2.94
Natural Gas Rates	2.19	2.76	2.60
Your Business Location in the City	2.38	-	-

Firms feel that the general economic climate is most important to the success of one's business, although slightly less important than the results from last year's survey (Table 16).

New markets seemed to have little to no affect for small business owners. Figure 2 depicts the trends of four significant challenges that businesses face.

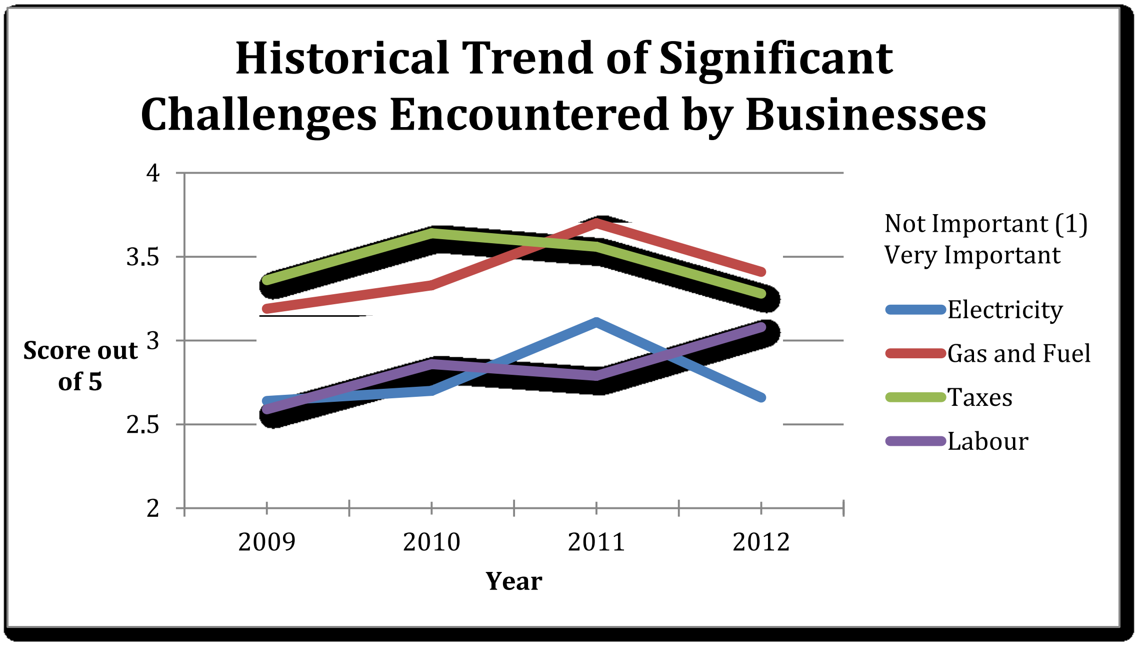

Figure 2

4. Importance of Factors for Future Success

What kind of affect will each of the following factors have on the future of your business?

Very Negative (1)
Very Positive (5)

Table 17

Factor in Question	2012	2011	2010	2009
Inventory Price Increases	2.27	2.43	2.38	3.06
General Economic Climate	2.76	3.13	2.98	4.20
Product/Service Diversification	3.24	3.37	3.25	2.74
Weather	2.74	2.53	2.81	2.29
New Markets (Beyond TBay)	3.41	3.21	3.14	1.97
Change in CDN Dollar	2.71	3.72	2.87	2.75
Increased Fuel/Energy Costs	2.20	2.49	2.34	3.34
Increased Insurance Rates	2.34	2.56	2.46	3.16
Cross Border Requirements	2.46	2.41	2.60	2.32

Weather, cross border requirements, and expansion to new markets have increased moderately, while the change in CDN dollars shows less impact in 2012, in comparison to 2011. (Table 17). Also, expansion to new markets has had an increasingly positive affect for small businesses and these trends are depicted in Figure 3.

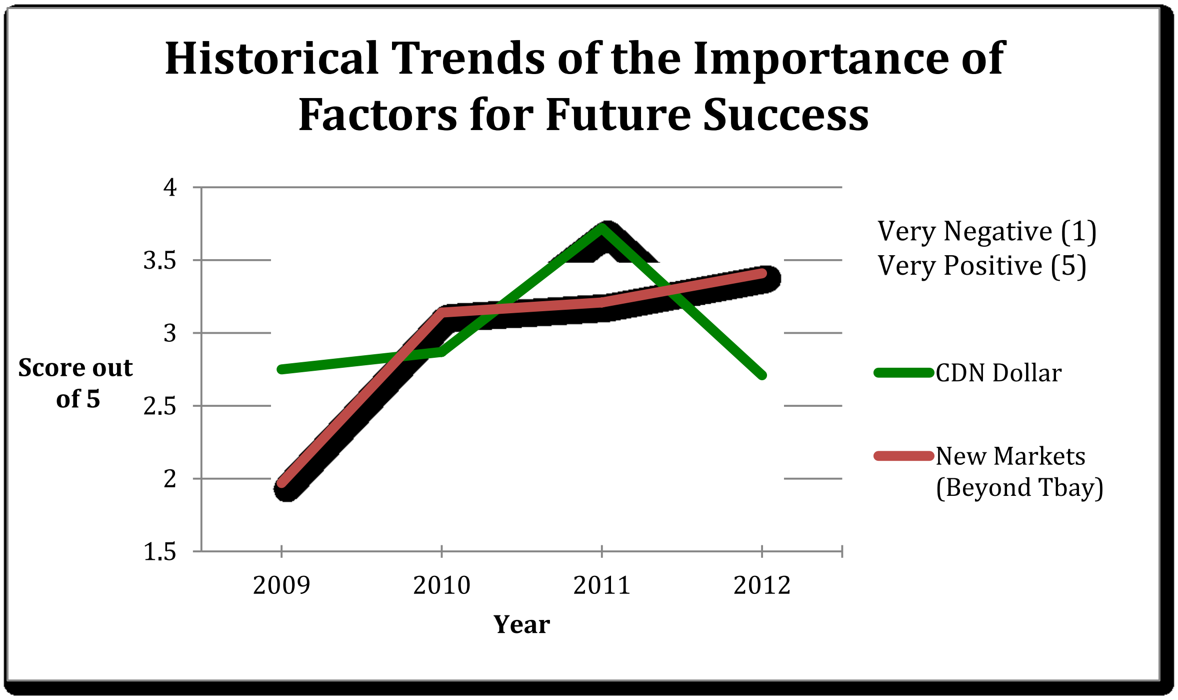

Figure 3

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)

Table 18

Investment Opportunity	2012	2011	2010	2009	2008	2007
Advertising/Promotion	3.13	2.97	2.83	2.87	3.10	3.06
Employee Compensation	2.84	2.80	2.85	2.80	2.85	2.64
Employee Recruitment	2.94	2.70	2.63	2.54	2.69	2.49
Staff Training Programs	3.07	2.79	2.94	3.01	2.82	2.76
Partnering with Other Firms	2.55	2.55	2.52	2.26	2.50	2.45
Inventory Supply	2.95	2.49	2.62	2.40	2.39	2.56
Capital Projects (eg. Equipment)	2.95	2.84	2.58	2.60	2.78	2.67
Market Research	2.45	2.55	2.35	2.39	2.40	2.39
Technology	2.93	2.96	2.73	2.84	2.84	2.80
Consulting/Advisory Service(s)	2.41	2.54	2.31	2.35	2.56	2.36

The result of the survey shows that businesses are willing to investing more in advertising, which is the same as last year's results, with a moderately higher rating in comparison to 2011. This change is shown in Figure 4 on the following page. Businesses are investing less in marketing research, technology, and consulting/advisory services (Table 18). There has, however, been a moderate increase in business' plans to invest in capital projects, advertising/promotion, employee compensations, and significant increases in employee recruitment, staff training programs, and inventory supply (Table 18).

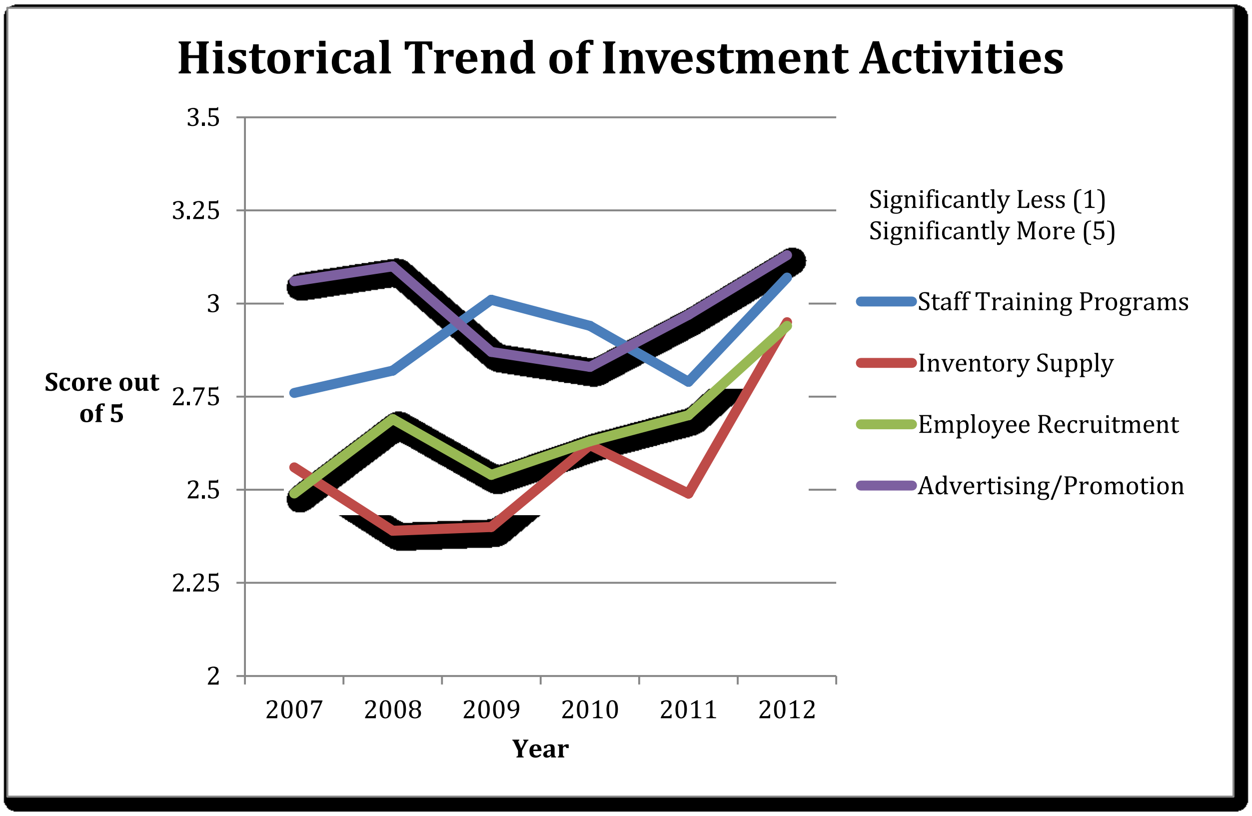

Figure 4

6. Impact of Development and Institutions

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

Very Negative (1)
Very Positive (5)

Table 19

Development/Institution	2012	2011	2010	2009	2008	2007
Increased Minimum Wage	2.32	2.38	2.35	-	-	-
Box Store Expansion	2.51	2.31	2.57	2.64	2.56	2.61
Gasoline/Fuel Prices	2.03	2.19	2.15	2.49	2.32	2.42
Cross Border Requirements	2.44	2.30	2.66	2.80	2.66	2.57
Waterfront Development	3.55	2.99	3.35	3.23	3.25	3.40
OLG Casino	2.45	2.41	2.40	2.31	2.42	2.28
Lakehead University	3.76	3.49	3.61	3.50	3.71	3.55
Confederation College	3.65	3.34	3.58	3.52	3.60	3.58
Municipal Tax Rates	2.21	2.34	2.24	2.44	2.99	2.92
Pulp and Paper Industry	2.81	2.84	2.76	2.31	3.07	2.44
Energy Rates (Heating, Electricity)	2.17	2.26	2.18	2.28	2.65	2.49
Mining Industry	3.85	3.48	3.68	3.15	3.64	3.20

There are mixed results regarding development and institutions impact on small businesses. In comparison with last year's results, higher ratings in education at both Lakehead University and Confederation College consistently appear to have the belief of being most positive developments/impacts on small businesses in Thunder Bay. The belief in the mining industry's positive impact has slightly increased in comparison to last year, and it is still considered one of the most important factors to small business owners in Thunder Bay (Table 19).

The Waterfront Development has shown a significant increase from last year, with a mean score rising from 2.99 to 3.55, indicating that firms are gaining faith in the Waterfront Development (Table 19). The importance of cross border requirements rating has increased slightly, but still indicates that small business owners are having issues with crossing the Canada-USA border. The OLG Casino is still believed to have a negative impact on small businesses with a mean score of 2.45. This is consistent with the last five years and it appears that small businesses attitudes are still relatively negative towards the Casino.

The mean scores for energy rates, tax harmonization, municipal tax rates and gasoline/fuel prices are the areas in which small businesses hold the most negative views, which is consistent with last year's results (Table 19). Figure 5 shows the trends of three significant developments/institutions.

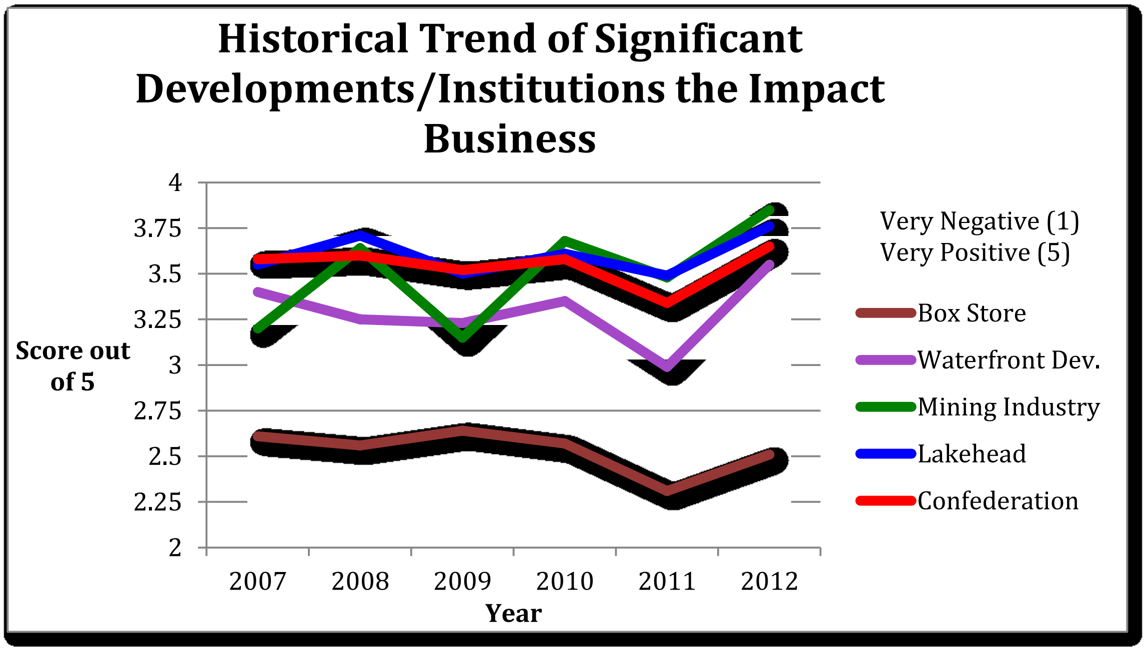

Figure 5

Thunder Bay Business Climate

The "Thunder Bay Business Climate" section of this 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 in regards to developments and institutions, sector growth potential and Thunder Bay's ability to meet the needs of its small businesses are also asked.

1. Anticipated Growth for Thunder Bay

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

Table 20

Anticipation of Growth	2012	2011	2010	2009	2008	2007
Decrease	8%	8%	17%	43%	29%	53%
No Change	18%	24%	30%	28%	31%	25%
Increase	74%	68%	53%	28%	40%	22%

Seventy-four percent (74%) of small business respondents believe that the Thunder Bay economy will have positive growth over the next year. A breakdown of the 74% shows that 69% of respondents anticipate a moderate increase and only 5% anticipated a significant increase (Figure 6). This view is significantly higher than last year's figure of 68% who anticipated an increase and significantly higher than 2009, when only 28% of respondents anticipated economic growth (Table 20). This trend suggests that small business owners are more confident that the economy is on its track to recovery and positive increases in the economy on their way.

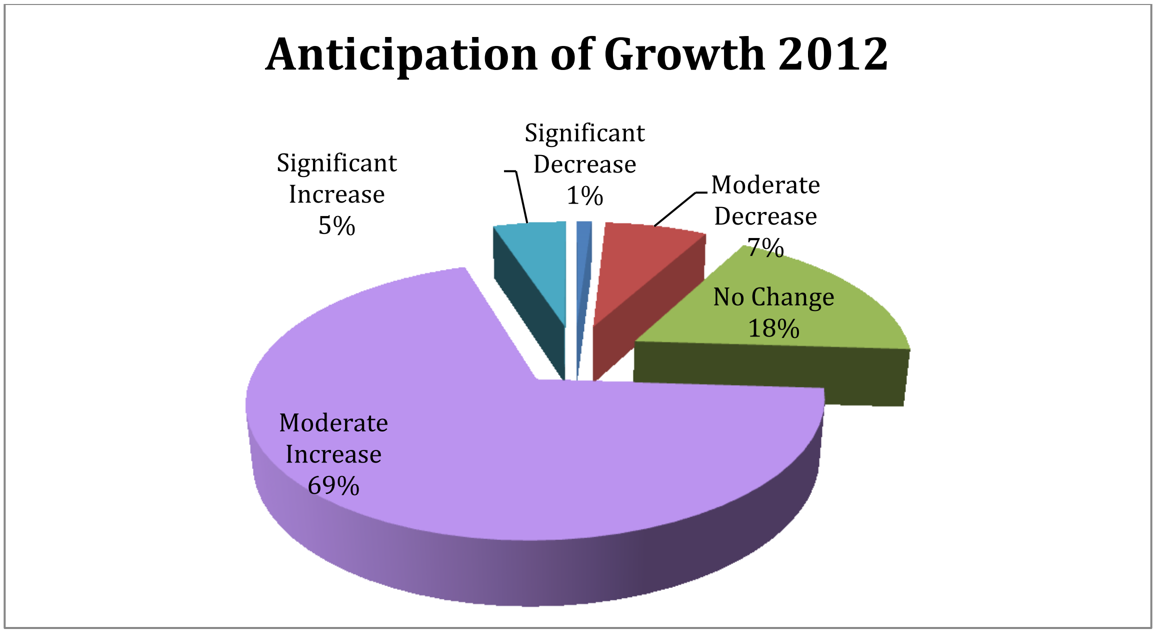

Figure 6

2. Future Security

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

Table 21

Response	2012	2011	2010	2009
Yes	85%	83%	77%	73%
No	15%	17%	23%	27%

Small business owners showed a significant increase in the belief about their future security and future business interests. Previous years' results indicated that 83% of small businesses felt secure in their future, while this year indicates that 85% possess a feeling of security (Table 21). The trend regarding future security can be seen in Figure 7.

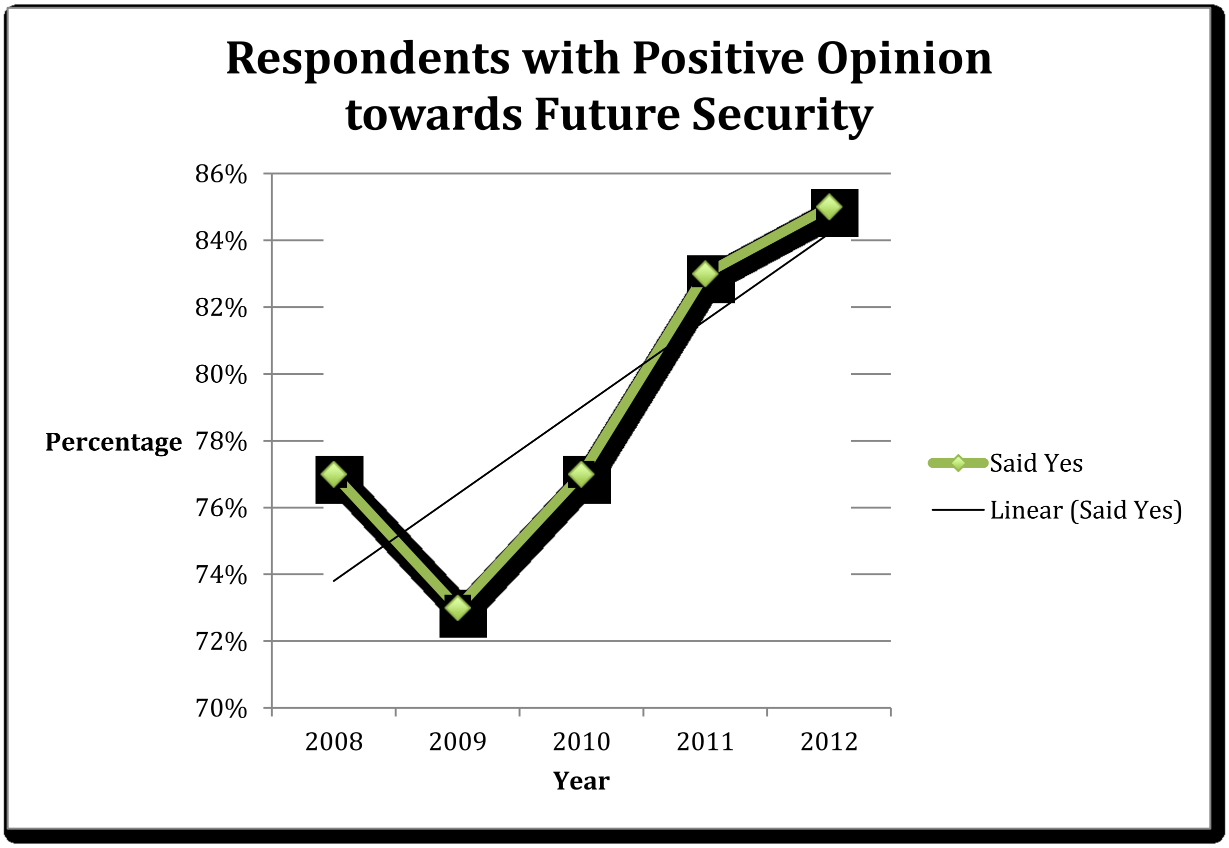
Respondents with Positive Opinion towards Future Security
86%
84%
82%
80%
78%
76%
74%
72%
70%
Percentage
2008
2009
2010
2011
2012
Year
Said Yes
Linear (Said Yes)

Figure 7

3. Sector Growth Potential

Evaluate the following Thunder Bay industry sectors in terms of their <u>actual</u> impact on Thunder Bay's Business Climate (e.g., new markets, new products/services).

None (1)
Great (5)

Table 22

Sector	2012	2011	2010	2009	2008	2007	2006
Primary – Forestry	3.04	2.19	2.17	1.75	2.21	1.63	2.24
Primary – Mining	4.06	4.15	4.00	3.10	4.17	3.26	-
Secondary (e.g., Large Manufacturing)	3.30	2.62	2.73	2.35	2.48	2.62	2.29
Small Manufacturing	3.32	3.14	3.06	2.83	3.08	2.95	2.77
Renewable Energy Production	3.14	3.14	3.38	3.08	3.62	-	-
Non-Renewable Energy Production	2.30	3.01	2.15	2.09	2.30	-	-
Health Care Services	3.92	2.39	3.83	3.83	3.98	3.91	3.66
Retailing	3.25	3.86	3.01	3.00	2. 73	3.11	2.83
Senior Services	3.49	2.95	3.68	3.63	3.86	3.52	3.50
Financial Services	2.84	2.97	2.98	3.01	2.97	2.94	3.03
Higher Education (LU/ConCollege/MedSchool)	4.06	3.94	3.83	3.61	3.97	3.95	4.08
Construction Services	3.70	3.50	3.25	3.05	2.94	2.90	-
Government Services	3.14	3.02	3.10	2.99	2.82	2.98	-
Hospitality/Tourism	3.42	3.27	3.26	3.09	3.13	3.58	3.47
Biotech	3.75	3.95	3.54	3.51	3.79	-	-
Other:	3.58	3.11	3.54	3.38	-	-	-

Small businesses have more confidence in a few of the sectors, but have their doubts regarding non-renewable energy production. This sector has the lowest score of 2.30. Health Care Services had the highest growth potential as its mean score increased from 2.39 to a score of 3.92 (Table 22). Senior services, forestry, and secondary sectors were also important to the respondents of this year's survey. In addition, construction services illustrate a growing trend over the past six years at a score of 3.70, up from 3.50 in 2011. Figure 8 on the following page depicts the trends of a few of these sectors.

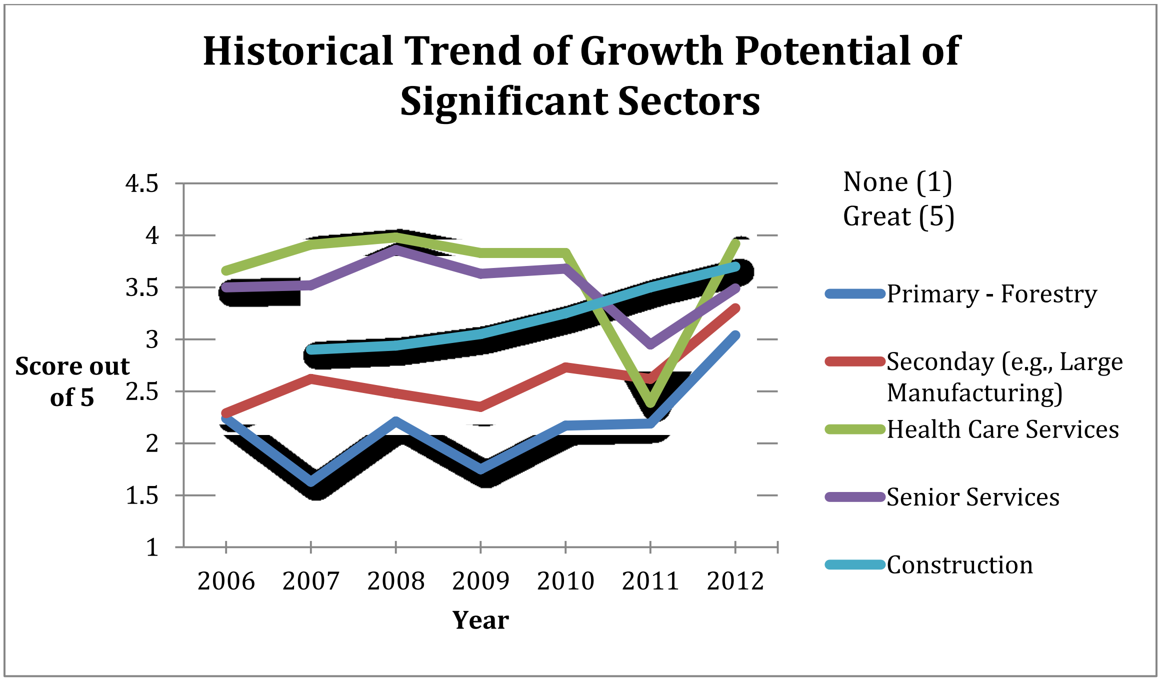

Figure 8

4. 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)

Table 23

Factor	**2012**	**2011**	**2010**
Labour Pool	2.86	2.83	2.90
Access to Raw Materials/Natural Resources	2.82	2.88	2.91
City's Promotional Efforts	2.75	2.45	2.59
Transportation Costs (Passenger)	2.65	2.47	2.73
Other Transportation Costs (Shipping)	2.38	2.24	2.35
City Infrastructure (e.g., Roads, Hydro, Gas)	2.71	2.42	2.76
Municipal Tax Rates	2.28	2.15	2.15
City Council Representation/Decisions	2.25	2.25	2.12
Access to Financing/Capital	2.74	2.76	2.81
Provincial Representation	2.53	2.49	2.59
Federal Representation	2.40	2.32	2.34

In regards to the City of Thunder Bay meeting the needs of small business owners, respondents felt the City's promotional efforts and City Infrastructure have improved in comparison to 2011. However, with all of the scores still falling below three, most respondents still feel that the City of Thunder Bay is not successful in meeting their needs as small business owners. Despite this trend, the scores for almost every sector has increased slightly, indicating that Thunder Bay is making improvements in the right direction at meeting the needs of small business owners (Table 23).

5. Business From The Mining or Mining Exploration Sector

Does yours business obtain all or part of its revenue from the Mining Sector or Mining Exploration Sector?

Table 24

Mining Sector?	2012
Yes	27%
No	73%

This question is new to this year's survey; it is evident from the results that the majority of businesses do not obtain all or part of its revenue from the mining sector or mining exploration sector with 73% responding no. This identifies that there is a large number of outstanding businesses that remain unaffected by the mining sector or mining exploration sector.

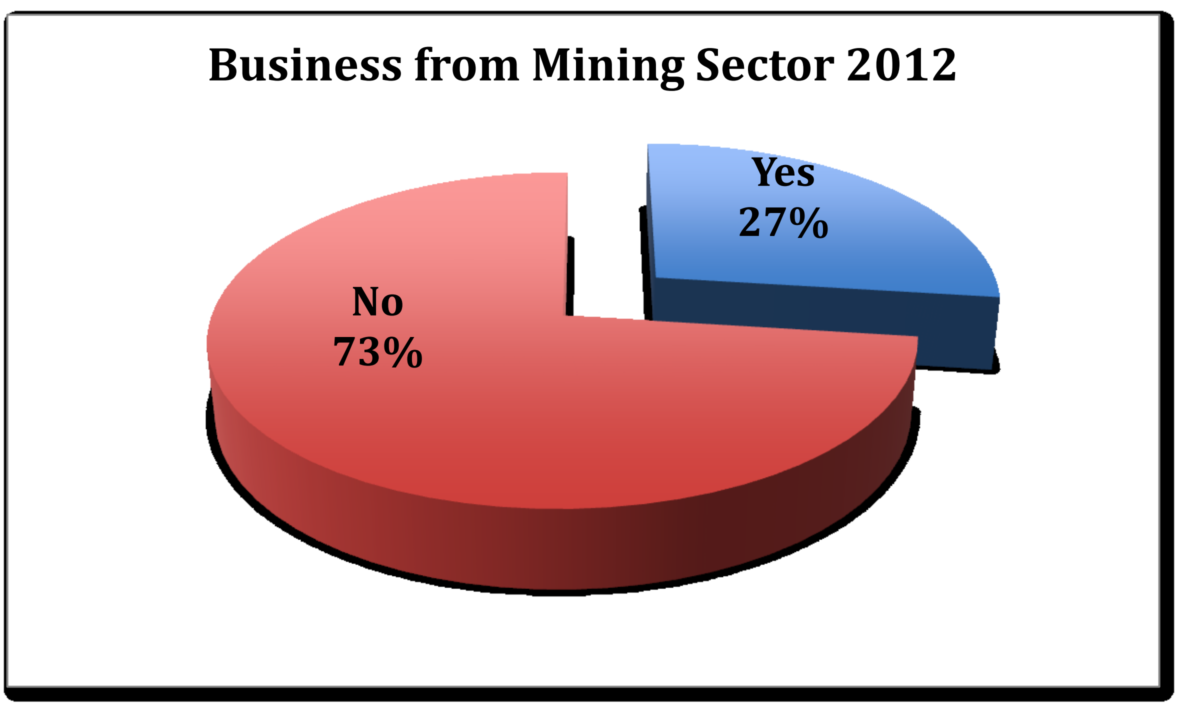

Figure 9

6. Characteristics That Impeded 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)

Table 25

Characteristic	2012	2011	2010	2009	2008	2007
Awareness of Region and Resources	3.45	3.14	2.26	3.09	3.20	3.02
Geographic Location	2.89	2.76	2.87	2.65	2.63	2.71
Weather (Perceived or Actual)	2.73	2.66	2.77	2.38	2.39	2.66
Quality of Life	4.01	3.96	3.99	3.90	3.98	3.98
Transportation Facilities (Airport, etc.)	3.42	3.48	3.52	3.50	3.21	3.33
Health Care Facilities	3.68	2.65	3.84	3.76	3.76	3.82
Economic Opportunity (Market Size)	2.56	2.58	2.70	2.46	2.45	2.56
Input Costs (Land, Labour, Capital)	2.82	2.65	2.76	2.69	3.00	2.69
Technology Infrastructure (Broadband)	2.87	3.08	3.07	2.90	3.20	3.24
City Government/Policies	2.36	2.32	2.24	2.29	2.53	2.35
Growing Aboriginal Population	2.54	-	-	-	-	-

In regards to what might impede or entice a small business to relocate to Thunder Bay, there was a very high increase in the importance of the awareness of the region and its resources. This factor increased from 3.14 in 2011 to 3.45 in 2012, indicating that respondents used to consider this an impediment but are now seeing it as an enticement. Small business owners felt that the quality of life and healthcare facilities are prime factors that entice businesses, whereas the awareness of the market size as well as city government/policies are two of the main impediments to small businesses relocating to the region. The growing aboriginal population, new to the survey this year, also proved to represent an impediment to small businesses relocating to the region (Table 25).

7. 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)

Table 26

Group	2012	2011	2010
Students (All Ages)	3.53	3.51	3.46
Professionals	3.95	3.73	3.85
Skilled Employees	3.68	3.66	3.61
Retirees	3.81	3.84	4.08
Business Owners	3.36	3.20	3.27
Aboriginal People	3.40	-	-

Quality of life is always a topic of interest when North-Western Ontario is discussed. Responses from small businesses show that the majority of respondents believe that professionals have the highest quality of life, which is unique to the previous beliefs in 2011 and 2010 indicating retirees to have the highest quality of life. Mean scores for all groups are above 3.00, which indicate that small businesses reflect positively on the quality of life in Thunder Bay (Table 26). Additionally, all groups' mean scores increased except for retirees, which had a very slight decrease.

8. 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"?

Table 27

Description	2012	2011	2010
Better Than Most	67%	70%	63%
The Same as Most	24%	29%	29%
Not as Good as Most	9%	1%	8%

When comparing North-Western Ontario with other regions, 67% of respondents feel that the quality of life in Thunder Bay is better than most comparable regions, which represents a slight decrease from last year's 70%. Those that believed the quality of life was the same had decreased to 24% from 29% in the previous years of 2010 and 2011 (Table 27). The respondents that believe Thunder Bay has a lower quality of life than most comparable regions had increased to 9% from 1% in 2011. This response is similar to the beliefs in 2010 identifying that 8% believed Thunder Bay to have a lower quality of life. However, without a concrete definition of what defines a good quality of life, this is very difficult to measure.

9. Changes in Consumer Spending

Have you noticed a change in consumer spending under the recent improved economic conditions?

Table 29

Response	2012	2011	2010
Yes	38%	72%	75%
No	62%	28%	25%

Recent improved economic conditions are affecting small businesses in Thunder Bay. 38% of the respondents have noticed changes in consumer spending due to the new conditions; however it was not specified whether the change was positive or negative (Table 29). These results are significantly different than previous years. Many respondents noted that consumers have less disposable income, which leads some to buy lower end goods, while others are more careful with their money and buy few and selective items.

10. Reconsidering Retirement

Have the recent improved economic conditions made you as a small business owner, reconsider when you will be retiring?

Table 30

Response	2012	2011	2010
Yes	23%	38%	47%
No	77%	62%	53%

23% of all respondents are reconsidering the date of their retirement, which is less than the number of respondents who were reconsidering retirement last year (Table 30). Most respondents said that their retirement would be postponed for a long time.

11. Economic Conditions and Thunder Bay

To what extent do you believe the current economic conditions are affecting Thunder Bay?

Table 31

Level of Significance	2012	2011	2010
Insignificant	14%	8%	9%
No Change	30%	21%	14%
Significant	56%	71%	77%

Of the respondents, 30% feel neutral and are finding that the economic conditions are having no affect on Thunder Bay. Furthermore, upward from 8% to 14% believe the impact is insignificant on Thunder Bay. The remaining respondents down from 71% to 56% feel that the current economic conditions are significantly affecting Thunder Bay (Table 31). In comparison to last year, more of this year's respondents are finding that the economic conditions are having no change or are insignificant.

Development Projects, Your Business and the Community

The last section of the report deals with how the small businesses feel in regards 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.

1. Thunder Bay City Council

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

Table 32

Response	2012	2011	2010	2009	2008
Yes	30%	26%	25%	24%	36%
No	70%	74%	75%	76%	64%

The views of small businesses towards the Thunder Bay City Council is always a particularly important question and keeping with the previous year's results the majority of small businesses feel that the City Council does not do a good job representing small businesses. Up 3% from last year, only 30% of small businesses feel that the City Council does a good job representing their business interests (Table 32). Leaving the majority of respondents to believe the City Council is poorly representing their business.

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?

Table 33

Response	2012	2011	2010	2009	2008
Yes	33%	30%	30%	30%	36%
No	67%	70%	70%	70%	64%

Only 33% of small businesses feel that Thunder Bay is aggressive at bringing new business to the region, which demonstrates a slight increase from previous years, indicating that the attitudes of small businesses in regards to City Council and its performance are continually stable (Table 33). Comments indicated that there is too much red tape involved, as well as other regulations, time consumption and obstacles to overcome.

3. Administrative Requirements

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

Table 34

Response	2012	2011	2010	2009	2008
Yes	37%	32%	36%	23%	33%
No	63%	68%	64%	77%	67%

When comparing the activities of the municipal government, 37% of respondents have been deterred from beginning new business ventures by administrative requirements. This is an increase of 5% from 2011, which indicates that the administrative process has become slightly better but businesses are still finding it difficult to deal with the zoning, permits, licenses and inspections that the municipal government requires (Table 34). This response has fluctuated slightly over the past five years, indicating that the administrative process has remained fairly stable.

4. Thunder Bay Economic Development Agencies

Are you aware of the following Economic Development Agencies in Thunder Bay?

Table 35

	2012	
Economic Development Agencies	**Yes**	**No**
Thunder Bay Community Economic Development Commission	68%	32%
Thunder Bay Ventures	93%	7%
Nishnawbe Aski Development Fund	61%	39%
Northern Ontario Heritage Fund	90%	10%

The results of this section indicate that a significant majority of the respondents are aware of Thunder Bay Ventures with 93% and Northern Ontario Heritage Fund with 90% (Table 35). When examining Nishnawbe Aski Development Fund 61% of respondents are aware, similar to Thunder Bay Community Economic Development Commissions where 68% of respondents are aware. These results indicate that the Thunder Bay EDC and the Nishnawbe Aski Development Fund should make greater efforts to promote their activities .

5. Lending Practices of Banks

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

Table 36

Respons e	**201 2**	**201 1**	**201 0**	**200 9**	**200 8**
Yes	38%	51%	45%	45%	37%
No	62%	49%	55%	55%	63%

The image of banks in Thunder Bay has decreased in comparison to the past few years; with 38% of respondents feeling like Thunder Bay banks are focused on meeting the needs of local businesses, down from 51% in 2011 (Table 36).

6. 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?

Table 37

Response	**2012**	**2011**	**2010**	**2009**	**2008**
Yes	74%	73%	62%	72%	66%
No	26%	27%	38%	28%	34%

The image of credit unions in Thunder Bay has relativity the same positive response as in 2011. 74% of small businesses surveyed felt that credit unions were focused on meeting the needs of small businesses (Table 37). These results are consistent with the results of 2011, and small businesses' attitudes towards credit unions are now more positive, with a 1% increase in approval from the previous year. The results for this question seem to be fluctuating from year to year but have remained relatively constant from 2011 to 2012. However, after reading the comments left it would appear that many respondents do not have much affiliation with credit unions.

7. Access to Capital

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

Table 38

Response	2012	2011	2010	2009	2008
Yes	22%	26%	16%	22%	36%
No	78%	74%	84%	78%	64%

The inability of firms to access capital in order to finance new business initiatives has decreased from 26% to 22%, which indicates that it is becoming more accessible for small businesses to access capital for new business ventures (Table 38).

8. Impact of the OLG Casino

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

Table 39

Response	2012	2011	2010	2009	2008
Positive	23%	16%	15%	13%	22%
Negative	77%	84%	85%	87%	78%

The activities of the Ontario Lottery and Gaming (OLG) Casino have always been greatly debated among small businesses and this year's results closely parallel results from previous years with 77% (Table 39) of small business respondents believing that the OLG Casino is having a negative impact on our city's economy (Figure 10). Generally the attitudes of small businesses towards the OLG have not changed and remain, for the most part, negative. Many heated comments were left regarding the impacts of the casino.

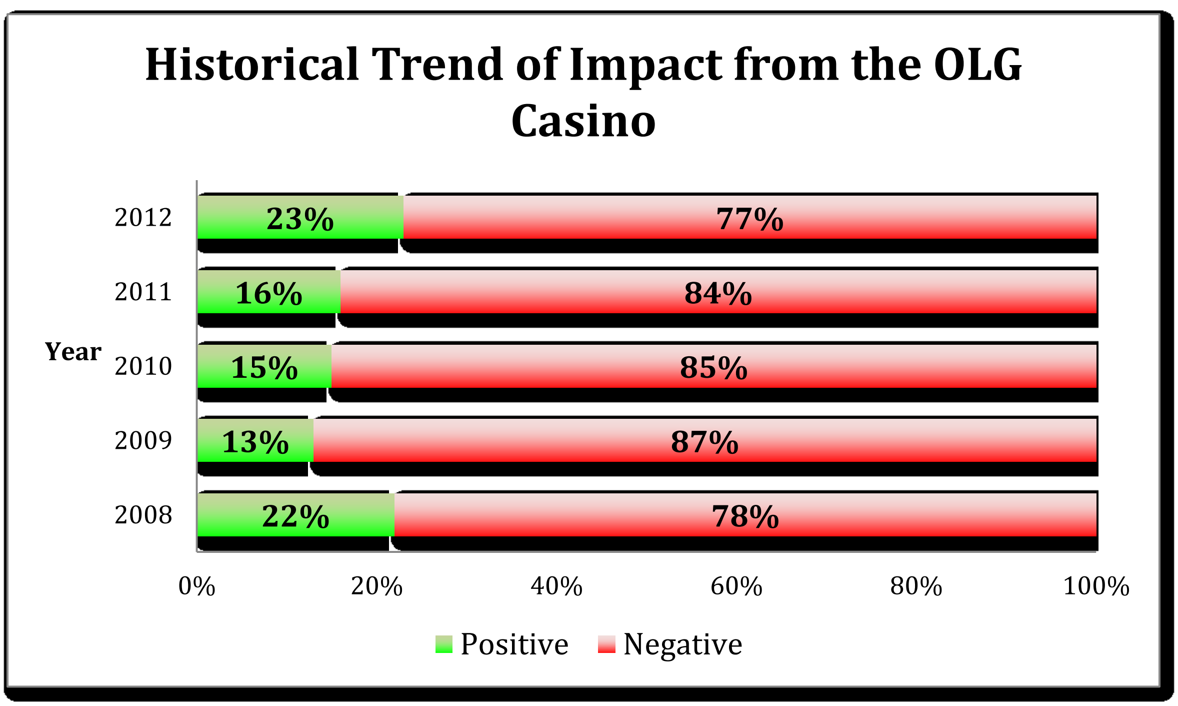

Figure 10

9. Multiplex

Do you believe that a multiplex is affordable for the City of Thunder Bay?

Table 40

Response	2012
Yes	75%
No	25%

This question is new to the survey, but the results indicate that the majority of respondents feel that the Multiplex is indeed affordable for the City of Thunder Bay (Table 40). Many comments revealed that individuals focused their concerns towards the placement and ensuring that a Multiplex is built in an appropriate location.

10. Industry Importance to Future of Economy

Please rank the following industry sectors in importance as a sector to the future of the Thunder Bay economy:

Not Important (1)
Very Important (5)

Table 41

Industry	2012	2011	2010
Forestry	3.54	3.48	3.49
Mining	4.49	4.46	4.54
Retail	3.72	3.54	3.71
Tourism	3.99	3.94	4.35
Transportation	4.01	3.85	3.79
Government	3.61	3.53	-
Aboriginal Organizations	3.76	-	-

A relatively new question to the survey, it appears that the highest ranked industries in importance to the future of the Thunder Bay economy are still mining at 4.49 and transportation at 4.01. Tourism has also proven to remain a constant importance over the past three years at 3.99. This means that small business owners in Thunder Bay consider these to be the most influential and important industries. In addition, each of the industries increased in importance from the 2011 responses, with transportation displaying the most significant increase. Forestry again had the lowest score of 3.54, an increase from last year's score of 3.48 (Table 41).

11. Raising Taxes to Combat Budget Deficits

The governments of Canada and Ontario are facing years of large budget deficits, do you support raising taxes as a policy alternative in the short-term to eliminate the deficits at a faster pace?

Table 42

Response	2012	2011	2010
Yes	31%	13%	16%
No	69%	87%	84%

After three years of being a question on this survey, it would appear that Thunder Bay business owners have not changed their opinion on the raising of taxes. However, a significant amount of respondents than last year are in support of raising taxes as an initiative, as 31% said yes, upward from 13% in 2011. This shows that most small business owners still have a negative perception of raising taxes and that it would not be well received if this occurred although more are warming up to the idea. Respondents feel that the government needs to learn to manage their money more carefully and that the topic is much more complex.

12. Media Advertising Methods

Presently what kind of media are you using for your advertising?

Not Important (1)
Very Important (5)

Table 43

Media Advertising	2012
Television	1.67
Radio	2.24
Website	4.23
Twitter	2.01
Facebook	3.02
Print	3.54
Other	4.24

This question is new to the survey, results indicate that most small businesses are using a website media for advertising purposes at 4.23. In addition, other that the majority of respondents indicated as word of mouth at 4.24, this is a media found to be very important for advertising purposes. Many respondents also indicated that television at 1.67, Twitter at 2.01, and radio at 2.24 is not important media for advertising. This shows that business owners feel the use of online methods such as print, a website and word of mouth are more presently important for advertising.

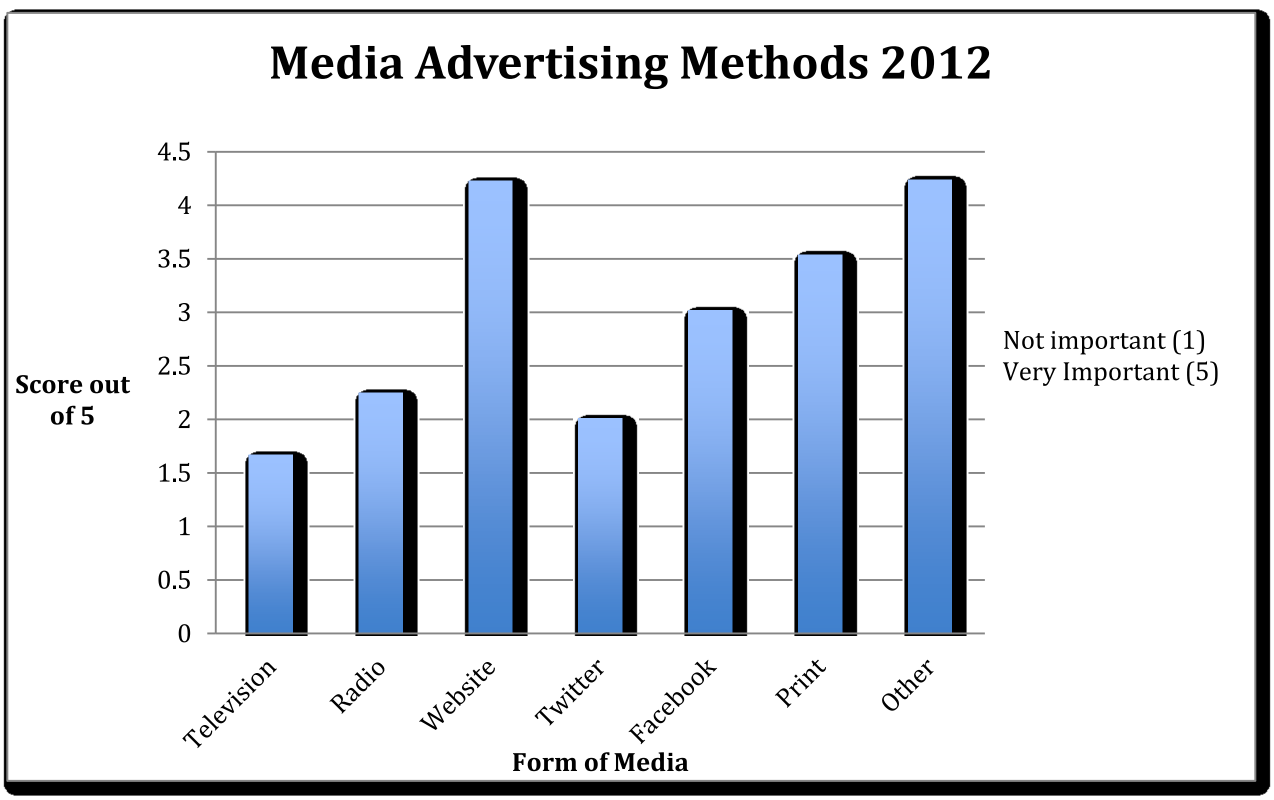

Figure 11

Selected Respondent Comments:

"Why do we build and spend money on the marina and its facilities, yet not open the marina to boats until the 15th of May? The faster you get the boaters in the water the sooner they start populating the marina park and spending money, supporting local business the season should be extended from this to November 1st regardless of all parks policy or staffing or insurance issues."

"Thunder By council is out of touch with most businesses in Thunder Bay, all they are concerned with are large infrastructure project like the waterfront, which they are poorly managing and health care!"

"There's lots of support for business startups, very little for existing business in the early years. Thunder Bay needs an improved sense of community/culture/history if it's going to attract new investors/businesses/clients/tourists. Thunder Bay's capital investments (waterfront/multiplex, etc.) are very exciting but need dynamic, continued planning and support to ensure their economic impacts are significant."

"In March of 2009, a city employee closed my businesses at 1520 Dawson Rd. due to zoning issues. I had operated with city licenses for 5 years. Mark Smith said the Chamber of Commerce was met with content and disinterest. Finally I hired a lawyer and have now been ignored by City totally since a "discovery hearing" in early 2010. I can only say the city of Thunder Bay is not interested in having, encouraging, or assisting small businesses. My business has been closed for three years and two months with no interest by the city licensing and enforcement or any other city department. "

"If every business owner cleaned up his or her own properties regularly, we would feel more pride in our city. Not too difficult."

"Businesses help define a neighborhood. As a city, we need to support and redefine all development ideas with the idea of filling existing buildings and repopulating areas, which are empty or neglected. We do not need to relocate business to different areas of the city in the hopes of expansion. Fill the core and the outlying areas will define themselves as well."

"Costs of gas, taxes, and insurance are hurting my business. Small business owners need a break. More small businesses will be closing their doors if the gov't doesn't give them a break."

"I find a lot of small businesses are missing the knowledge needed to improve their business. This seems mostly due to the lack of info, education/expertise, and understanding. Most still believe the sectors (i.e. forestry) that were strong before will always exist, and therefore still rely on them."

"City council is out of touch with business owners. It is very difficult to remember when councilors last spoke about helping businesses. Why is the city now the largest employer?"

“A very significant challenge is finding skilled employees. We work in construction, and to find skilled tradesmen, it is very difficult. Keeping in with legislate & paperwork is also challenging.”

“Have you walked downtown PA on Cumberland St? That is the first impression of T.Bay when the tourist boats stop here and let me tell you, it's NOT a good impression! A few years back when the boats stopped here, I had 2 tourists tell me "boy has this city seen better days" & "what happened to this city?" We should be ashamed of ourselves. City council needs to look at businesses and lack of them in the downtown PA core. LOWER PROPERTY TAXES!!! Get rid of paid parking. The call center does nothing for us, having it in the Prime Retail spot. Stick the call center in a school they are tearing down. The old Eaton’s should be nothing other than retail. Tell me what the hell did city council do to get a major retailer to take over the old Eaton’s? NOTHING!!!”

In regards to the Casino, “Any organization that is designed to make money from peoples addictions cannot possibly have a positive effect on our economy.”

Appendix A - 2012 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 see past reports go to www.thunderbayventures.com . If you have questions, please call our representative at 620-2922.

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 ☐ Wholesale ☐ Manufacturing ☐ Professional Services ☐ Personal Services ☐ Other _________

5. Postal Code: ____________

6. Legal status of business ☐ Sole Proprietor ☐ Partnership ☐ Corporation

7. Education level of the owner ☐ High School ☐ College ☐ University

8. 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)	☐

9. How many people are currently employed at your firm? Full-Time ____Part-Time ______

10. What change in the total employment level of your firm occurred during the **2011** fiscal year?
    - ☐ Increased
    - ☐ Remained the same
    - ☐ Decreased

11. 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 lay off employees

12. Which of the following best represents your actual sales or billings for the **2011** fiscal year?

☐ Less than $25,000	☐ $100,000 - $249,999	☐ $1,000,000 -
☐ $25,000 - $49,999	☐ $250,000 - $499,999	☐ Greater than
☐ $50,000 - $99,999	☐ $500,000 - $999,999	

13. Does this **2011** sales volume represent an increase or decrease over your 2009 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%

14. Do you anticipate an annual sales increase for the **2012** fiscal year?

- ☐ Yes
- ☐ No

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

	Not a Problem				**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 Rates	1	2	3	4	5
n) Taxes	1	2	3	4	5
o) Your business location in the City	1	2	3	4	5

16. How important **<u>were</u>** the following factors to your sales/revenue performance in the **2011** fiscal year?

	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) Insurance Rates	1	2	3	4	5
k) Cross Border Requirements	1	2	3	4	5
l) Gasoline and Fuel Rates	1	2	3	4	5
m) Electricity Rate	1	2	3	4	5
n) Natural Gas Rates	1	2	3	4	5
o) Your business location in the City	1	2	3	4	5

17. What kind of affect will each of the following factors have on the future of your business?

	Very Negative				Very Positive
a) Inventory Price Increases	1	2	3	4	5
b) General Economic Climate	1	2	3	4	5
c) Product/Service Diversification	1	2	3	4	5
d) Weather	1	2	3	4	5
e) New markets (beyond Thunder Bay)	1	2	3	4	5
f) Change in CDN dollar	1	2	3	4	5
g) Increased Fuel/energy costs	1	2	3	4	5
h) Increased Insurance Rates	1	2	3	4	5
i) Cross Border Requirements	1	2	3	4	5

18. 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

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

	Very Negative				Very Positive
a) Increased Minimum Wage	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 Requirements	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) Municipal Tax Rates	1	2	3	4	5
j) Pulp/Paper Industry	1	2	3	4	5
k) Energy Rates (heating, electricity)	1	2	3	4	5
l) 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	Significan 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 sectors in terms of their actual impact on Thunder Bay's Business Climate (e.g., new markets, new products/services).

	None				Great
a) Primary-Forestry	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/ Con College/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/ Medical technology	1	2	3	4	5
p) 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) City's Promotional Efforts	1	2	3	4	5
d) Transportation Costs (Passenger)	1	2	3	4	5
e) Other Transportation Costs (Shipping)	1	2	3	4	5
f) City Infrastructure (e.g., Roads, Hydro, Gas)	1	2	3	4	5
g) Municipal Tax Rates	1	2	3	4	5
h) City Council Representation/Decisions	1	2	3	4	5
i) Access to Financing/Capital	1	2	3	4	5
j) Provincial Representation	1	2	3	4	5
k) Federal Representation	1	2	3	4	5

5. Does your business obtain all or part of its revenue from the Mining Sector or Mining Exploration Sector?
- ☐ Yes
- ☐ No

6. In general, to what extent do you <u>believe</u> 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) 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
k) Growing Aboriginal Population	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
f) Aboriginal People	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. Have you noticed a change in consumer spending under the recent <u>improved</u> economic conditions?
- ☐ Yes
- ☐ No

Comment: ____

10. Have the recent <u>improved</u> economic conditions made you, as a small business owner, reconsider when you will be retiring?
- ☐ Yes
- ☐ No

Comment: ____

11. To what extent do you believe the current <u>improved</u> economic conditions are affecting Thunder Bay?

Insignificant	**Somewhat Insignificant**	**Neutral**	**Somewhat Significant**	**Significant**
1	2	3	4	5

Section C: Development Projects, Your Business & the Community (Why/Why Not Responses Are Optional)

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 the lending practices of banks in Thunder Bay are focused on meeting the needs of local business?

☐ Yes
☐ No

Why/Why Not? ____________________

5. 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? ____________________

6. Are you aware of the following Economic Development Agencies in Thunder Bay?

a) Thunder Bay Community Economic Development Commission ☐ Yes ☐ No
b) Thunder Bay Ventures ☐ Yes ☐ No
c) Nishnawbe Aski Development Fund ☐ Yes ☐ No
d) Northern Ontario Heritage Fund ☐ Yes ☐ No

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

☐ Yes
☐ No

Other Sources Utilized: ____

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

☐ Positive
☐ Negative

Comment: ____

9. Do you believe that a multiplex is affordable for the City of Thunder Bay?

☐ Yes
☐ No

Comment: ____

10. Please rank the following industry sectors in importance as a sector to the future of the Thunder Bay economy:

	Not Important				**Very Important**
a) Forestry	1	2	3	4	5
b) Mining	1	2	3	4	5
c) Retail	1	2	3	4	5
d) Tourism	1	2	3	4	5
e) Transportation	1	2	3	4	5
f) Government	1	2	3	4	5
h) Aboriginal Organizations	1	2	3	4	5

11. The governments of Canada and Ontario are facing years of large budget deficits, do you support raising taxes as a policy alternative in the short-term to eliminate the deficits at a faster pace?

☐ Yes
☐ No

Comment: ____

12. Presently what kind of media are you using for your advertising? Please rank.

	Not Important				**Very Important**
a) Television	1	2	3	4	5
b) Radio	1	2	3	4	5
c) Website	1	2	3	4	5
d) Twitter	1	2	3	4	5
e) Facebook	1	2	3	4	5
f) Print	1	2	3	4	5
g) Other ____________________	1	2	3	4	5

Please provide any other comments you wish in the space below and overleaf:
(i.e. most significant challenge for your business, a success story to be shared, other).

Thank you for your time – it is greatly appreciated!

A press-conference and Media release will publish the results – at 11:00am on Wednesday, June 27, 2012 at the Thunder Bay Art Gallery.