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**ONTARIO ECONOMIC SUMMIT**

*An Initiative of the Ontario Chamber of Commerce*

**Preparing for Growth:  
Observations on the Economic Landscape of  
Ontario  
by Leger Marketing**

# Agenda

- 1 Methodology**
- 2 Perceptions of Ontario's Creative, Knowledge Driven Economy**
- 3 Ontario as a Tourism Industry**
- 4 Ontario: Destination for New Investment/Business Expansion**
- 5 Examining Ontario's Green Economy**

# Methodology

## INSTRUMENT

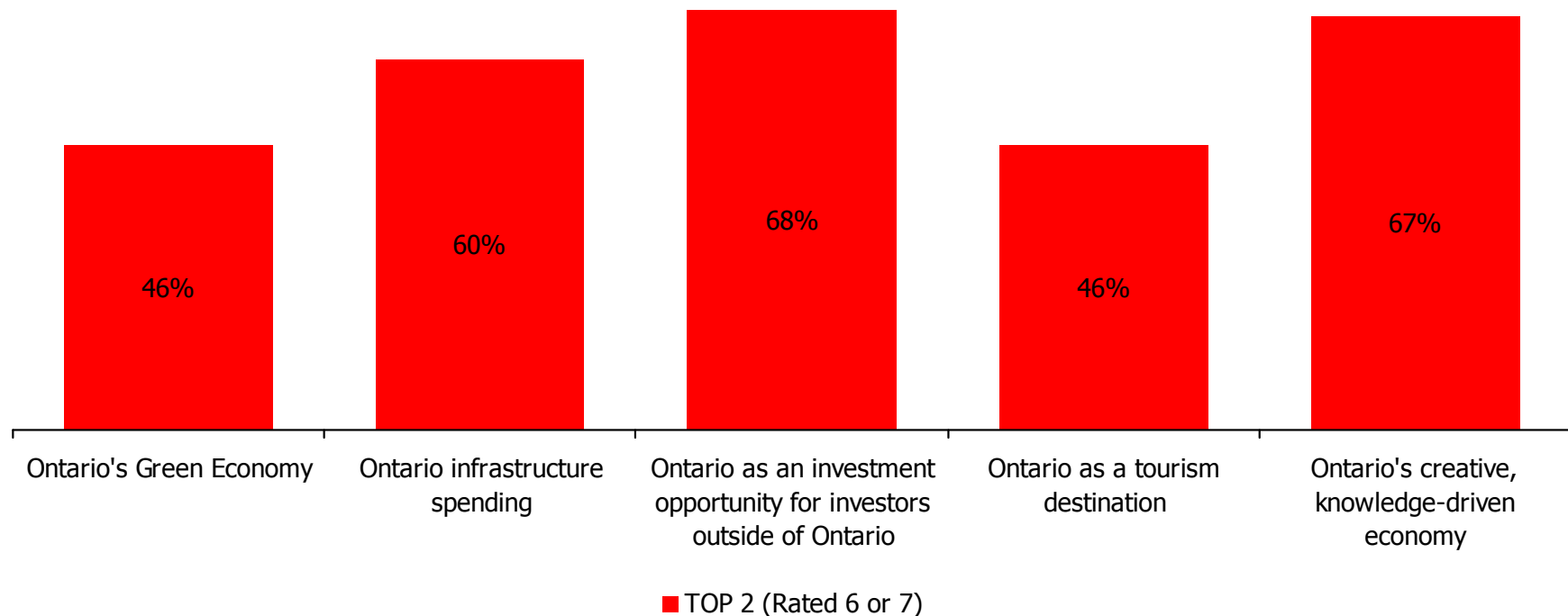
- The survey was conducted Online between October 1st and 14th, 2009.

## SCOPE

- A total of 207 interviews were completed with Ontario economic leaders including business, academia, government and labour.

# Addressing Investment Opportunities for Investors Outside of Ontario and a Creative, Knowledge Driven economy are The Most Critical Issue

- Two-thirds of participants felt that the most critical issues (rated a 7 or 6 on a 7 point scale) to be addressed were Ontario as an invest opportunity for investors outside of Ontario (68%) and Ontario's creative knowledge-driven economy (67%). Three-fifths (60%) felt that infrastructure spending was critical, while Ontario's green economy and Ontario as a tourism destination were critical issues to be addressed for just under half of the participants polled (46%).
- Those participants who work for a company with 50 plus employees were significantly more likely to feel that it was critical to address investment opportunities for investors outside of Ontario than those with fewer than 50 employees ( 86% vs. 62%).



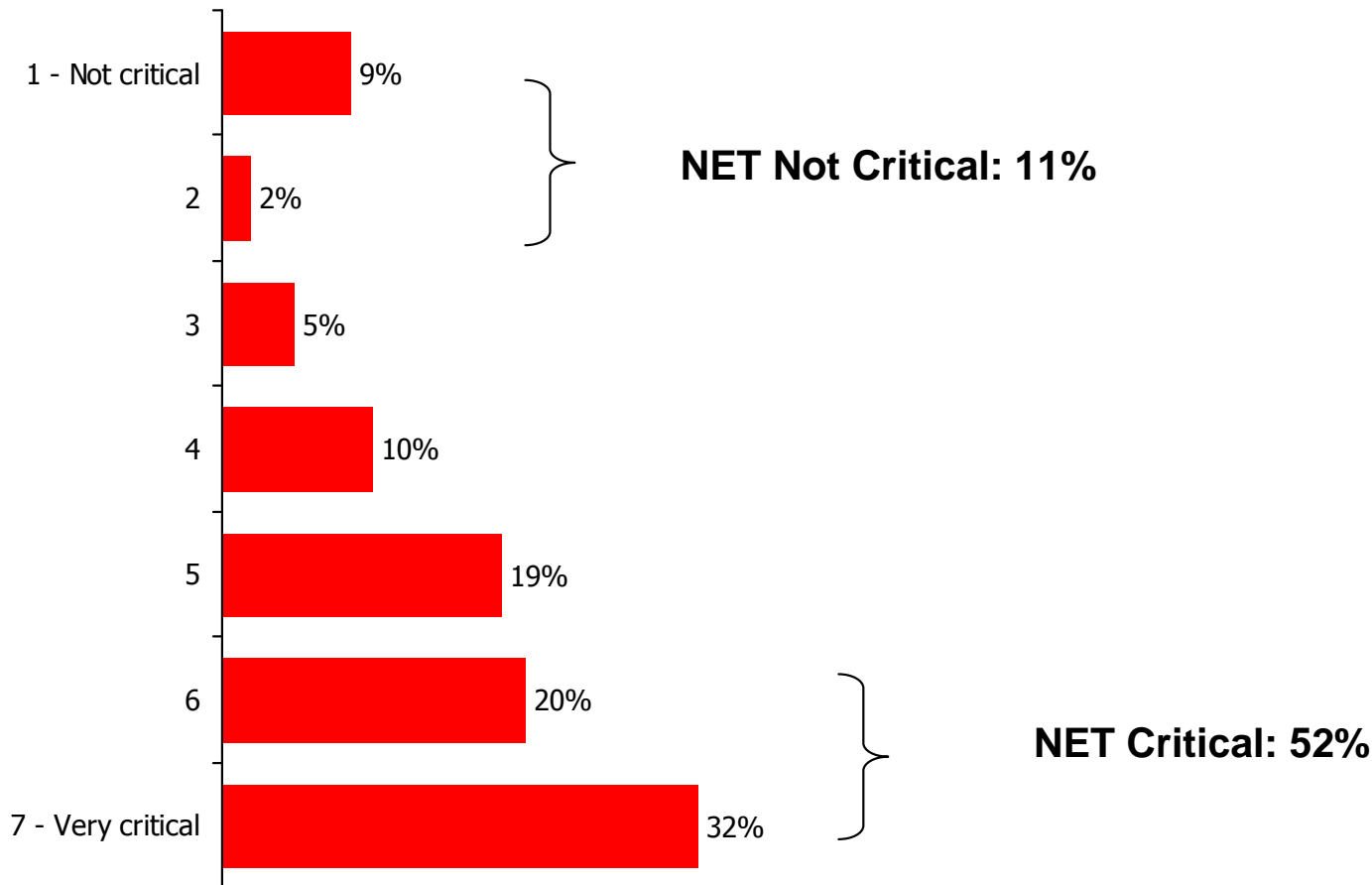
For each of the following issues, please tell me how critical it is that each issue be addressed.  
Base: (n=207)

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# Majority Believe Creative, Knowledge-Driven Economy is Critical to their Business

- One-third of respondents surveyed (32%) felt that the creative, knowledge-driven economy is very critical to their business.
- Respondents working in a business with fewer than 50 employees were significantly more likely to feel that the creative, knowledge driven economy is not critical (rated a 1 or 2 on the 7 point scale) to their business than those at larger business' (13% vs. 5%).

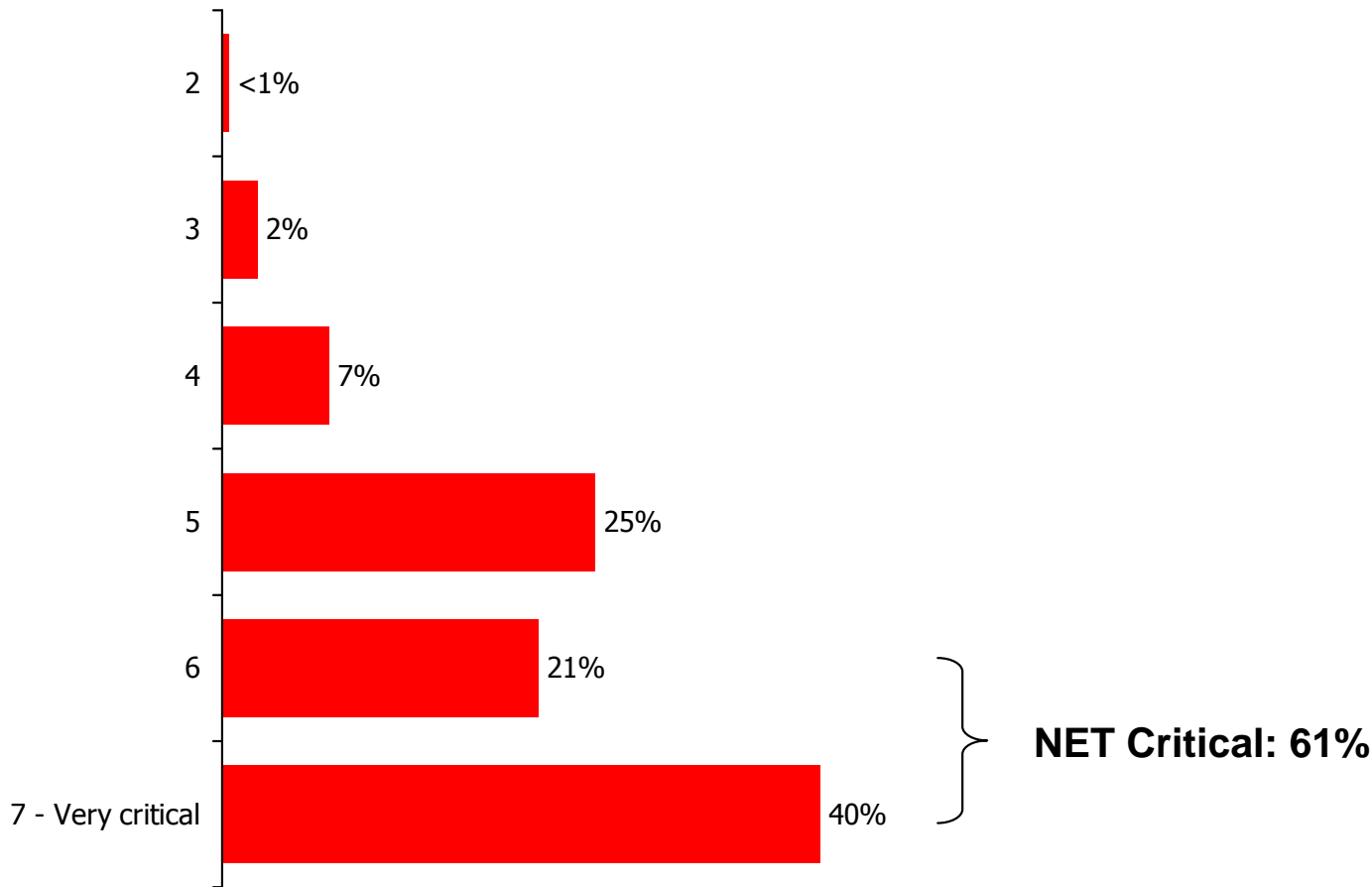


Mean = 5.2

How critical is the creative, knowledge-driven economy in Ontario to your business?  
Base: (n=207)

# Even More Critical to Leverage in Order to Grow Ontario's Economy

- Three-fifths of respondents (61%) feel that it will be 'critical' (rated 7 or 6 on the 7 point scale) for Ontario to leverage this creative knowledge-driven economy in order for economic growth. Two-fifths from this group expressed that it is 'very critical' for Ontario to leverage creative, knowledge driven industries for growth.
- The majority of participants recognize the growing importance that leveraging a creative knowledge driven economy will have for Ontario economic future.

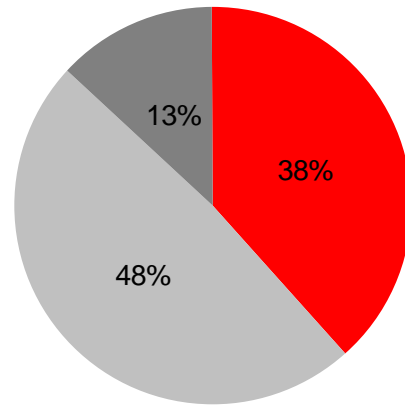
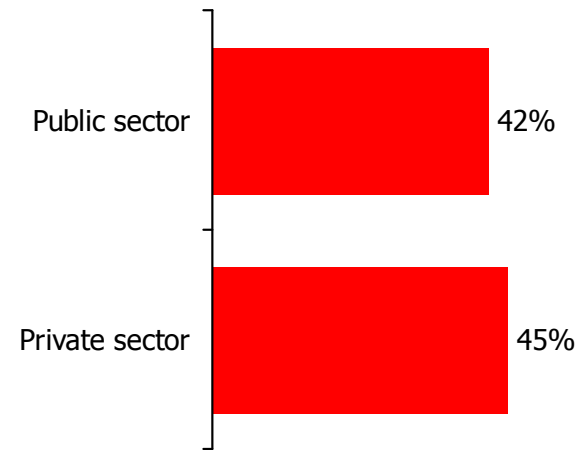
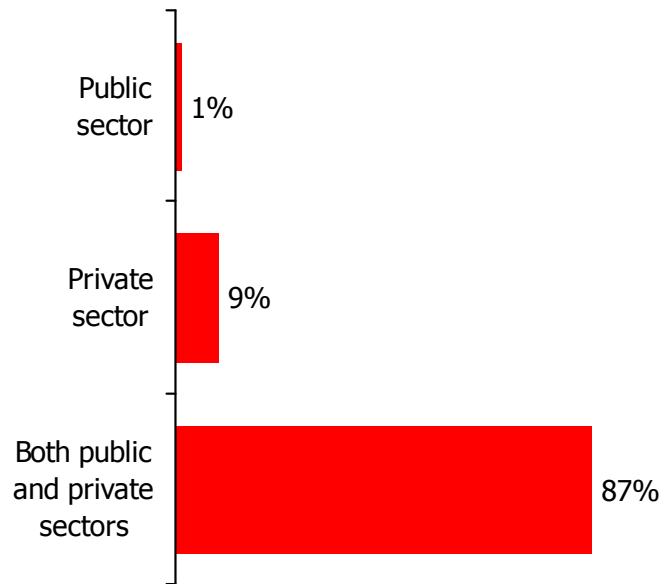


Mean = 5.9

How critical will it be for Ontario to leverage creative, knowledge-driven industries to grow Ontario's economy?  
Base: (n=207)

# A Strong Belief that there is Shared Responsibility For Creating/Expanding Ontario's Creative, Knowledge-Driven Economy

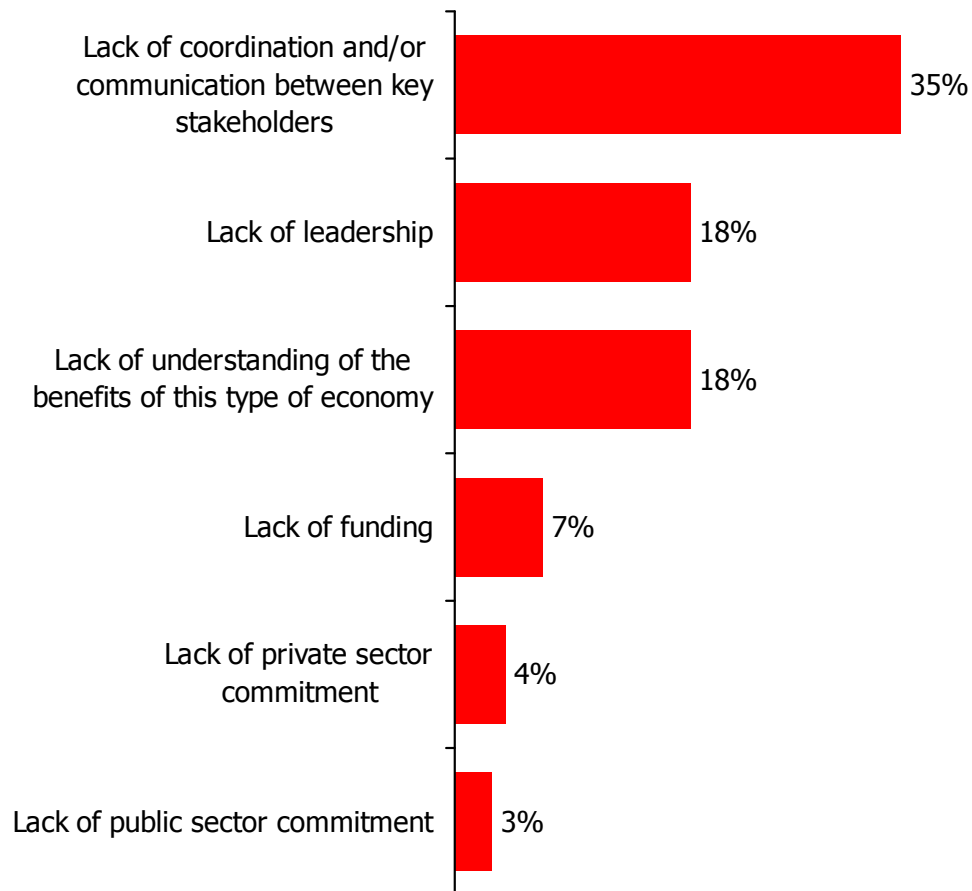
- Nearly 90% of those surveyed felt that both the public and private sectors together are responsible for the creation and growth of Ontario's knowledge-driven economy.
  - When asked to select one of the 2 options, an even split occurred, with 42% believing the public sector should initiate or lead, while the 45% felt the private sector should lead or initiate discussion.



- Public sector
- Private sector
- Don't know

# Lack of Coordination/Communication Between Stakeholder is the Key Barrier

- One-third (35%) of respondents felt that the key barrier to the creation of a creative knowledge-driven economy in Ontario was a lack of coordination/communication between key stakeholders. The lack of leadership and the lack of understanding the benefits were mentioned by nearly one-fifth of respondents.
- Those participants employed by business' of 50 or more employees were significantly more likely to feel that lack of coordination/communication was the key barrier than those in smaller sized business' (53% vs. 28%).

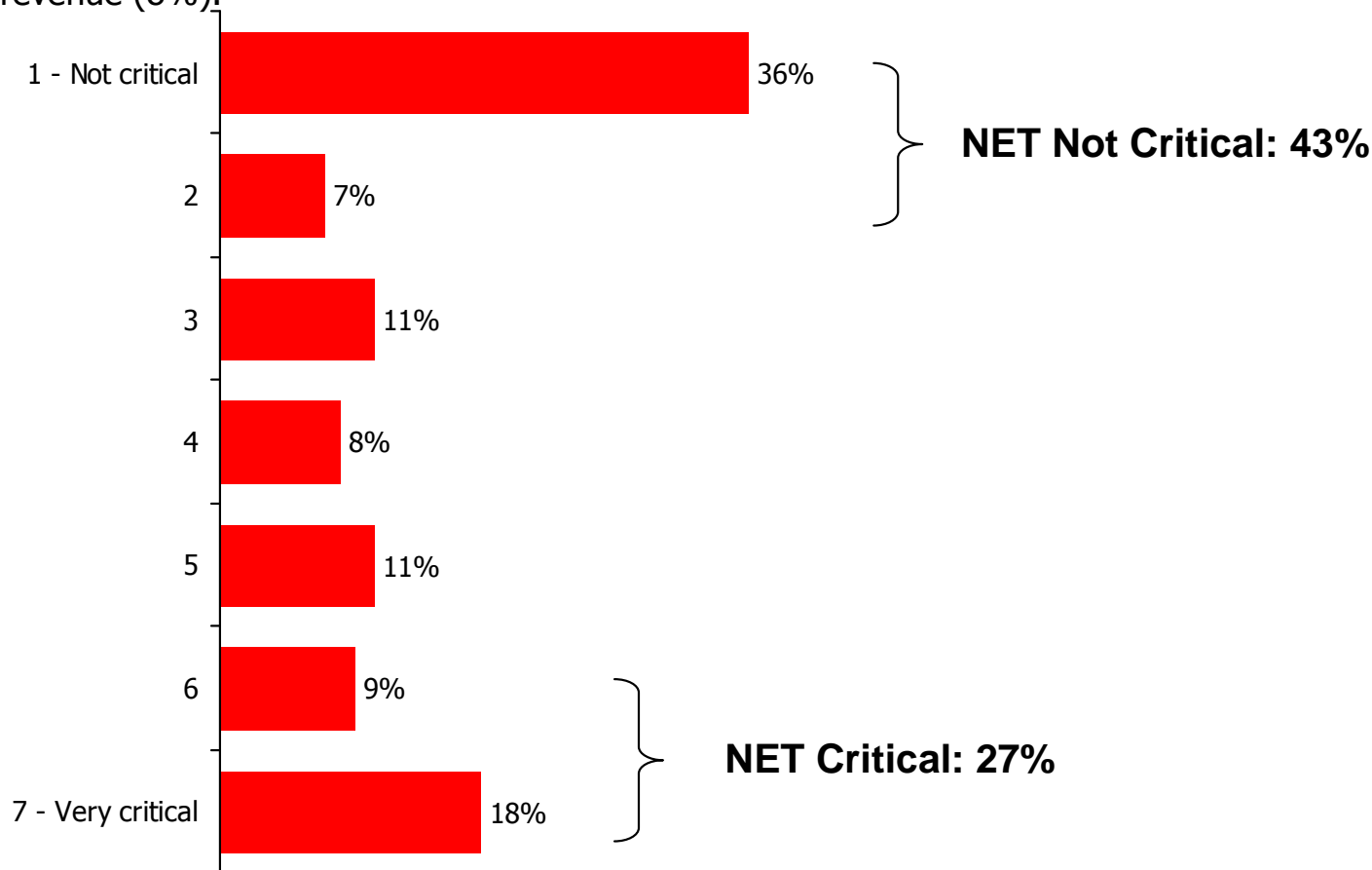


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# Little Belief that Ontario as A Tourist Destination Critical to Business

- Just over one-quarter (27%) of respondents felt that Ontario being a tourism destination was critical to their business, while more than two-fifths felt this was not critical (43%).
- Those employed by companies with less than 5 Million dollars in revenue were significantly more likely to view Ontario being a tourism destination as 'Very critical' (23%) to their business than those with greater annual revenue (8%).

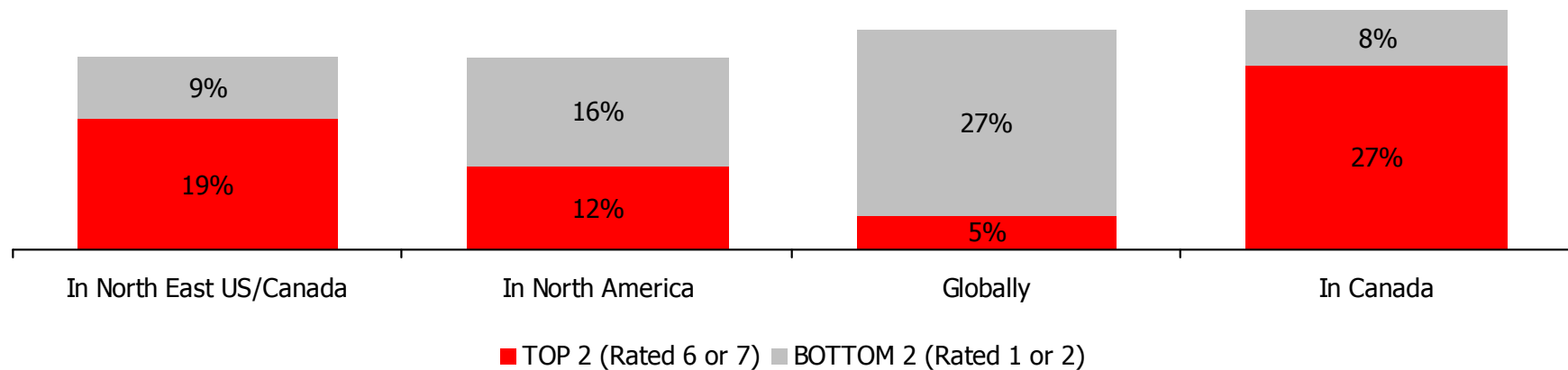


Mean = 3.5

When it comes to Ontario being a tourism destination, how critical is this to your business?  
Base: (n=207)

# Little Belief that Ontario is a Competitive Tourist Destination

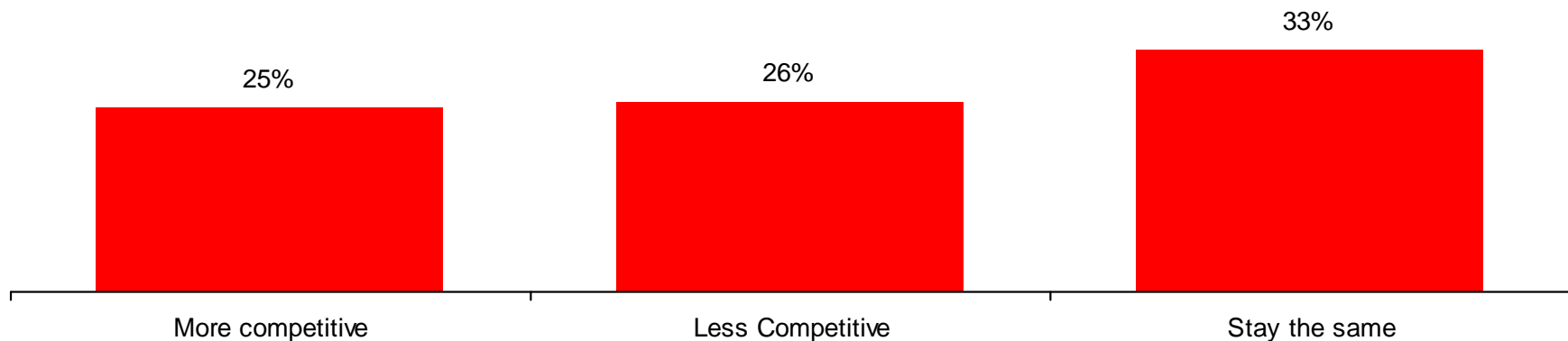
- Ontario tourism was viewed as neither being very competitive, not uncompetitive by participant across all regions.
- Only one-quarter of participants surveyed (27%) felt that Ontario was a competitive tourism destination within Canada (rated a 7 or 6 on the 7 point scale).



When it comes to Ontario as a tourism destination, how competitive is Ontario comparative to other destinations  
Base: (n=207)

# Even Divide For the Future Competitiveness of Ontario Tourism

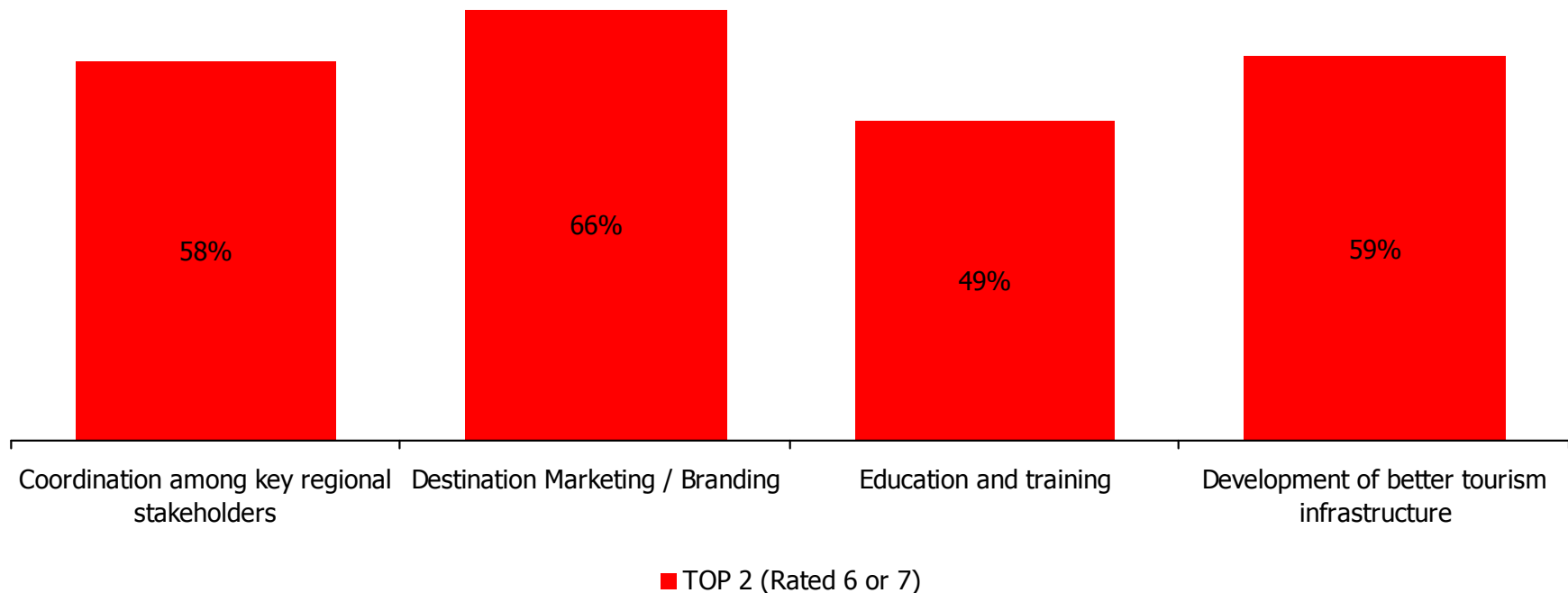
- While the one-third believe Ontario's competitive tourism position will stay the same, one-quarter of respondents polled felt that Ontario will become more competitive (25%) as a tourism destination, while the same percentage felt that Ontario will become less competitive (26%).
- Respondents who worked for companies with annual revenues of less than 5 million dollars were significantly more likely to believe that Ontario would become more competitive as a tourism destination in the future than those with greater annual revenue (28% vs. 13%)



Will we see Ontario as a tourism destination become more or less competitive in the future, or stay the same?  
Base: (n=207)

# Marketing/Branding Most Impactful Initiative

- Destination marketing/branding was viewed by two-thirds of respondents (66%) as the initiative with the most impact (rated a 7 or 6 on the 7 point scale) to make Ontario a more competitive tourism destination in the future. Nearly three-fifths of participants' rated coordination amongst key regional stakeholders (58%) and development of better tourism infrastructure (59%) as critical.
- Those participants with business' that have less than 5 million dollars of revenue annually were significantly more likely to feel that destination marketing/branding was critical than those with greater annual revenue (71% vs. 52%).



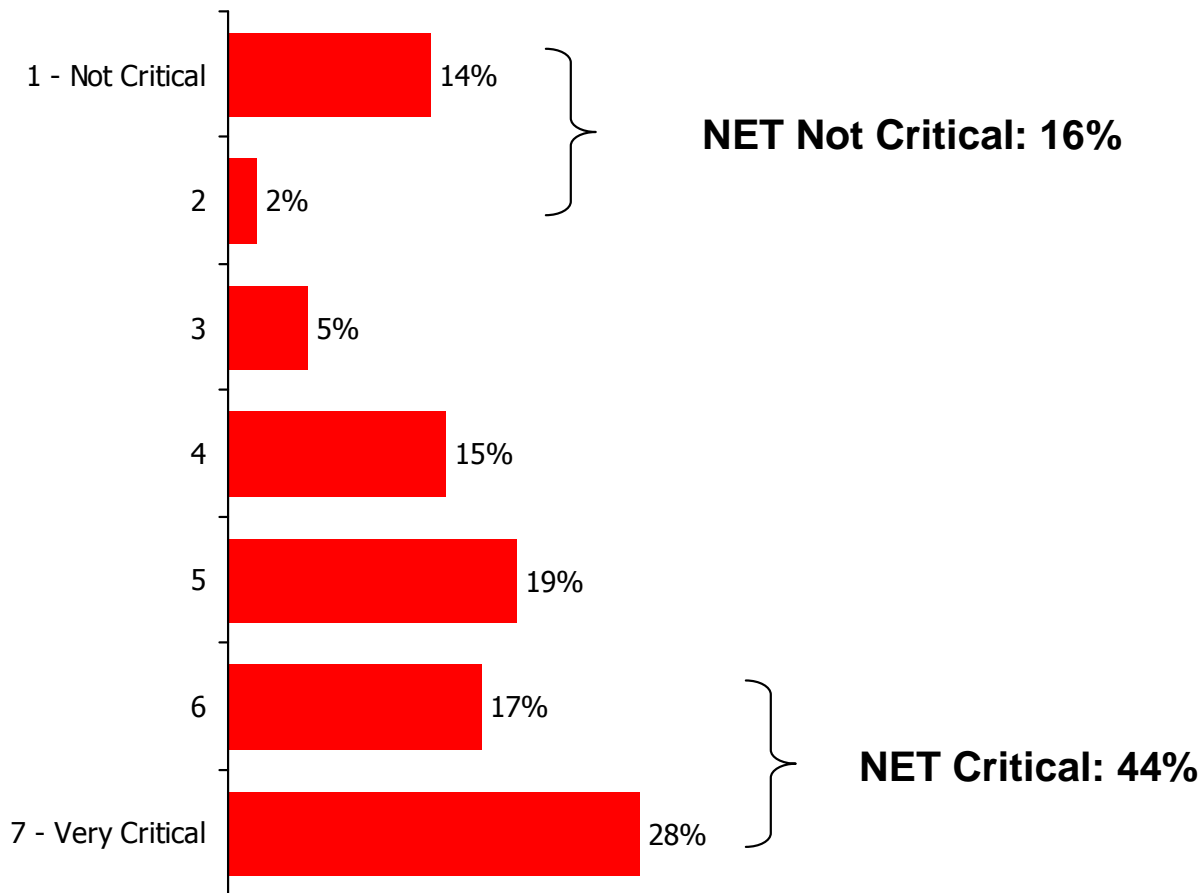
For the following initiatives, please rate each of them on how much impact you feel they will have on Ontario as a tourism destination in the future using a scale from 1 to 7, where 7 means they have a strong impact and 1 means they have little impact.  
Base: (n=207)

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# Two-Fifths Feel Ontario as an Investment Opportunity is Critical to Their Business

- Over one-quarter (28%) of respondents believe that Ontario as an investment opportunity is critical to their business.
- Those in government were significantly more likely (89%) to view Ontario as an investment opportunity as a critical issue (a score of 7 or 6 on the 7 point scale) than those in the business (59%) and Not-for-Profit sectors (53%).

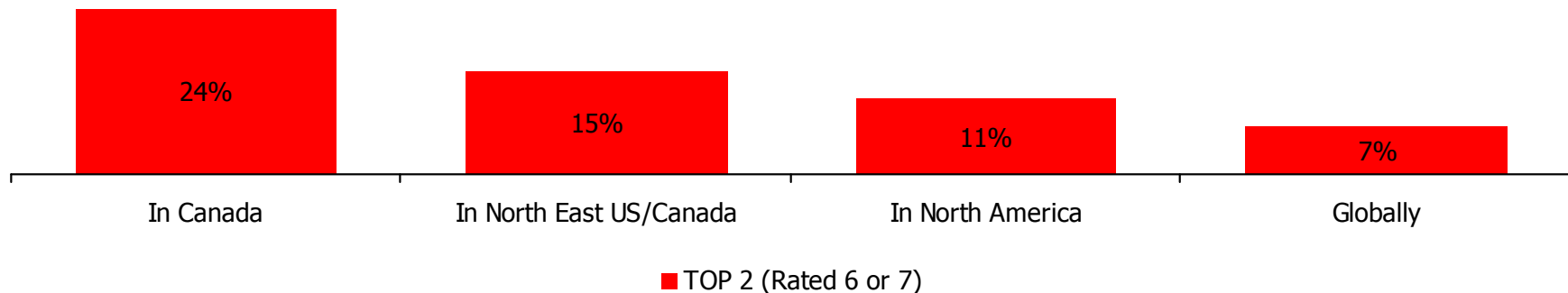


Mean = 4.9

When it comes to Ontario as an investment opportunity, how critical is this issue to your business?  
Base: (n=207)

# Ontario Not Seen as a Competitive Presence for New Investment and Business Expansion

- A quarter of respondents surveyed felt that Ontario was competitive (rated a 7 or 6 on the 7 point scale) within Canada , but those numbers dwindled as the regional scope expanded; down to a low of only 7% believing that Ontario was competitive on a global scale in terms of being a destination for new investment and business expansion.

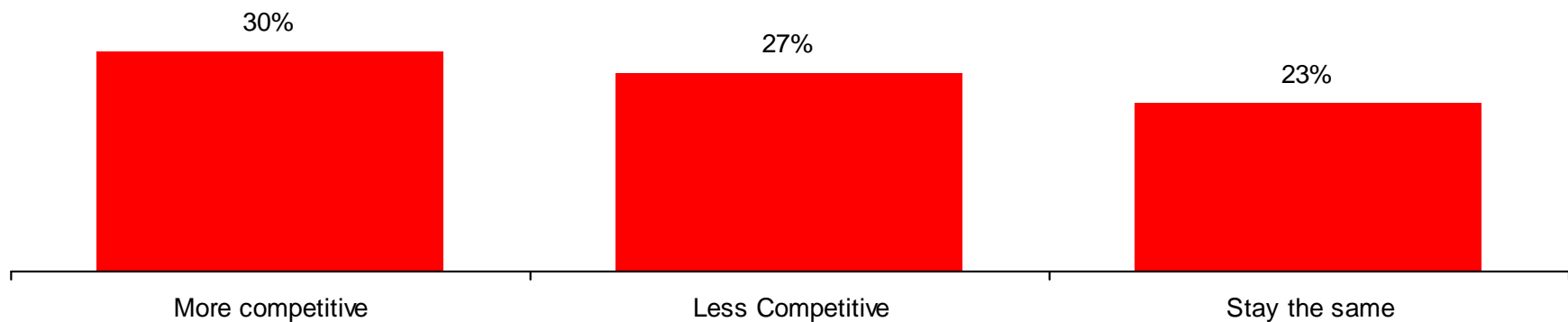


When it comes to Ontario as a destination for new investment and business expansion, how competitive is the province when it comes to other locations.

Base: (n=207)

# Opinions Divided On Future Competitiveness

- While three-in-ten (30%) respondents surveyed felt that Ontario would become more competitive as a destination for new investment and business expansion, almost an equal number (27%) felt that Ontario would become less competitive. Nearly a quarter of those polled (23%) felt that Ontario's position would remain unchanged in the future.
- Those in the business sector were significantly more likely to believe that Ontario would become less competitive than those in the Not-For-Profit sector (30% vs. 7%).

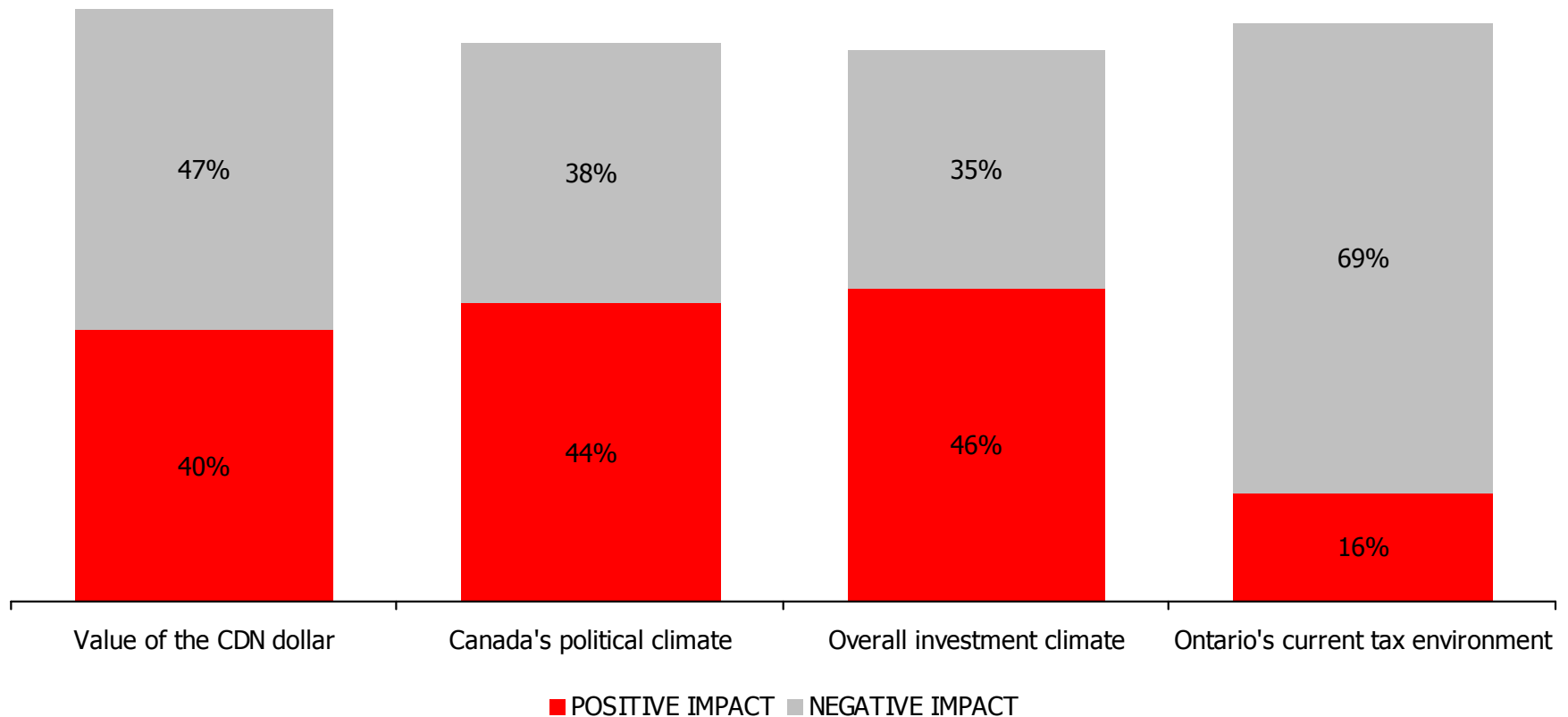


Will we see Ontario as a destination for new investment and business expansion become more or less competitive in the future, or stay the same?

Base: (n=207)

# Key Barriers to Investor Interest in Ontario

- Overall optimism was most evident on a broad scale, with 46% of respondents feeling that the overall investment climate in Ontario would have a positive impact, while 44% felt that Canada's political climate would have a positive impact on investors interest in Ontario as a destination for new investment.



Please rate the following items on how positive or negative you believe they impact investors' interest in Ontario as a destination for new investment and business expansion.

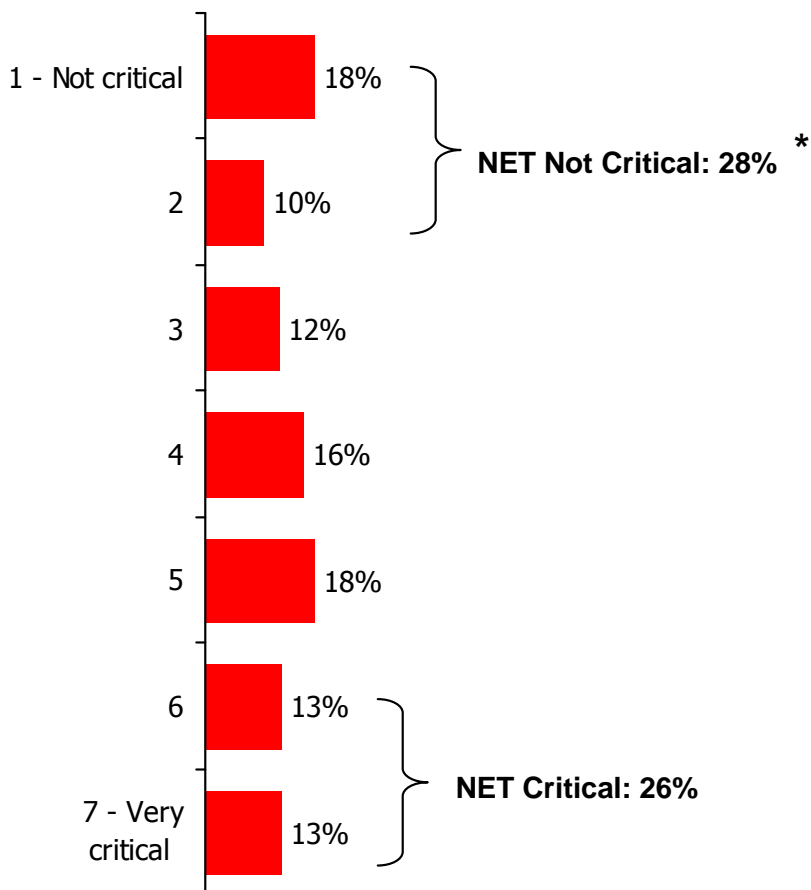
Base: (n=207)

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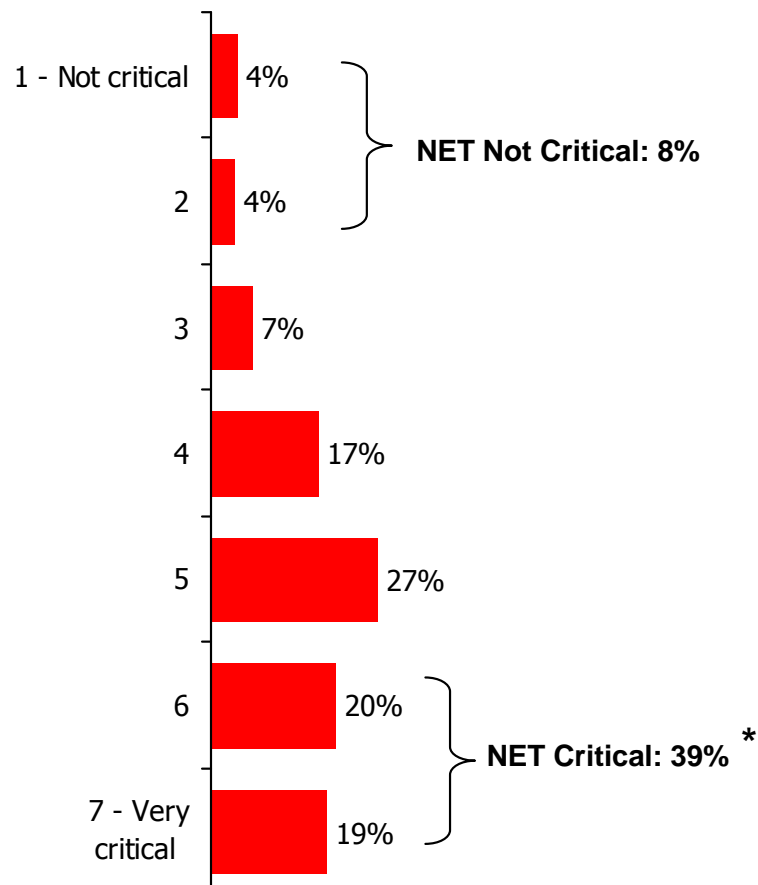
# Green Economy = Big Picture

- While only one-quarter (26%) of respondents felt that the green economy in Ontario was critical to their business, a significantly higher percentage (39%) felt that the green economy was critical to the Ontario economy. The same pattern holds when looking at those who rated the green economy as not critical to their business (28%) compared to only 8% who felt that the green economy was not critical to Ontario's economy.
- C-level executive were significantly more likely to view the green economy as critical to Ontario's economy than those at the VP and Executive Director level (41% vs. 19%)



How critical is the green economy in Ontario to your business?  
Base: (n=207)

**Mean = 4.0**



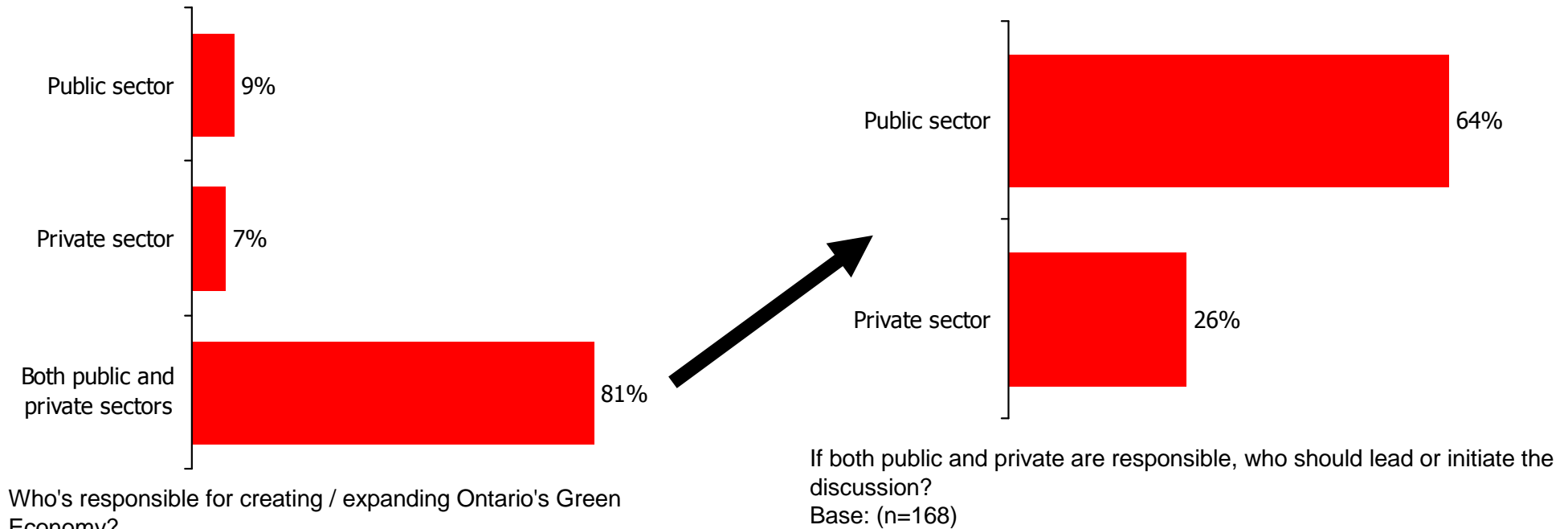
How critical is the green economy to Ontario's economy?  
Base: (n=207)

**Mean = 5.0**

\* Equals a significant difference at 99% confidence level.

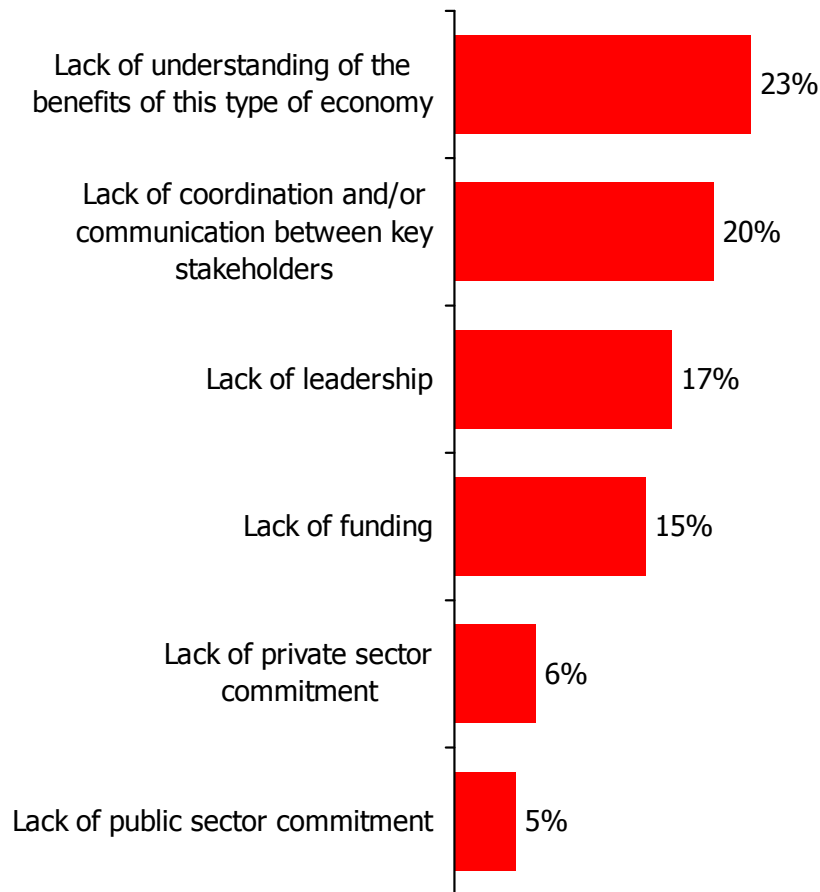
# Again a Belief in Shared Responsibility

- While four-fifths (81%) of participants initially said that both the public and private sectors are responsible for creating and expanding Ontario's green economy, after being asked who should lead or initiate the discussion, the overall picture for responsibility shifts drastically toward a belief that the public sector should be the initiator or leader, with three-fifths of all participants selecting.
- Those in larger sized business' were significantly more likely to believe that the public sector should lead the discussion/take responsibility than those in business with fewer than 50 employees (74% vs. 55%).



# Understanding Potential Benefits and Communication Barriers

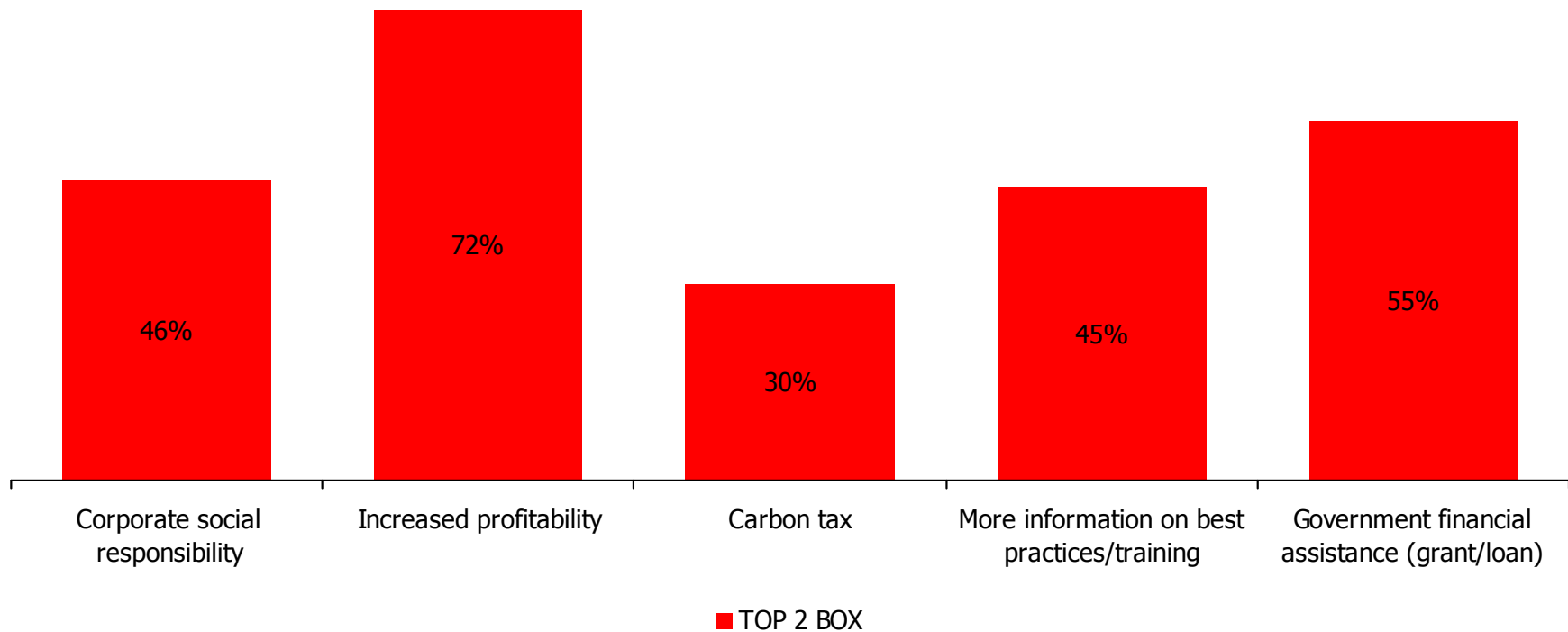
- Just over one-fifth (23%) of participant felt that the key barrier to creating a green economy in the province is the lack of understating of the benefits. Another fifth believe that a lack of coordination/communication between key stakeholder is the key barrier to creating a green economy in Ontario.



What is the key barrier to creating a green economy in the Province of Ontario?  
Base: (n=207)

# Bottom Line Remains Key Motivator

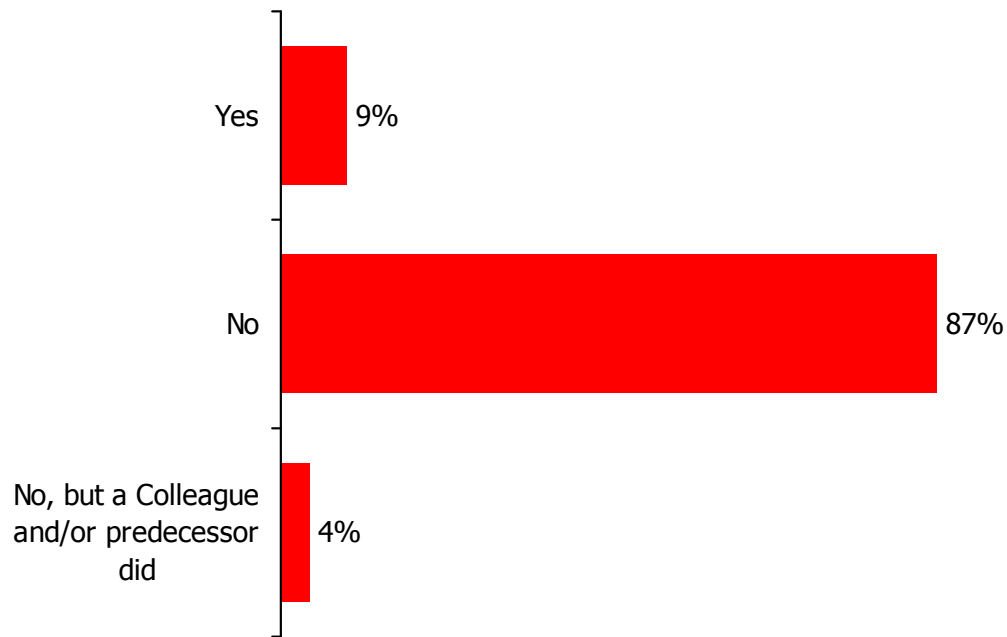
- A strong majority, nearly three-quarters of respondents, expressed that increased profitability (rated a 7 or 6 on the 7 point scale) would be the most likely motivator for getting their organization to reduce its carbon footprint. Just over half (55%) said the government financial assistance would motivate their organization to reduce its carbon footprint. While less than one-third (30%) felt that a carbon tax would likely motivate their organization to reduce its carbon footprint.
  - Business with more than 5 million dollars in annual revenue were significantly more likely to view a carbon tax as a motivator than those with less than 5 million (42% vs. 25%).



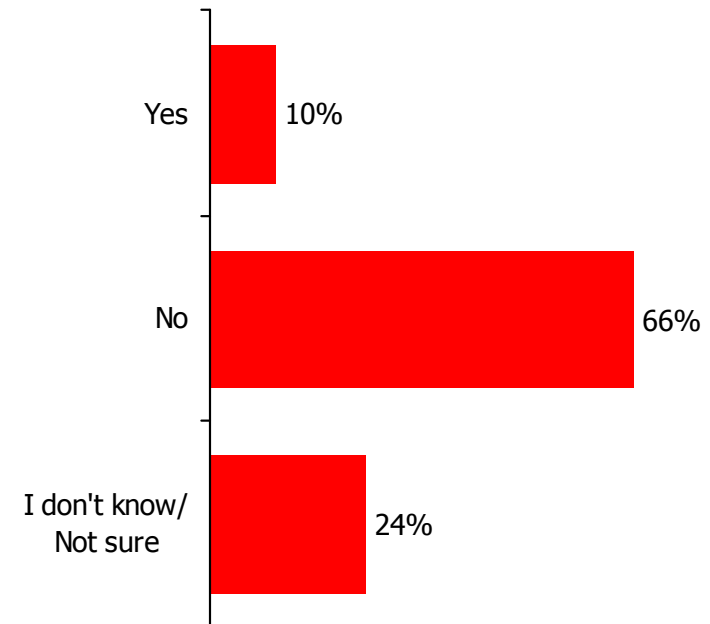
For each of the following, please tell me how likely it is that each would motivate your organization to reduce its carbon footprint.  
Base: (n=207)

# Only 9% Have Attending Previously

- Just under 10% of participant had previous attended an Ontario Economic Summit.
- The same percentage of respondents plan on attending the 2009 OES.
- Participants with business' of revenues of 5 million dollars annual or more were significantly more likely to attend this years summit than those with less annual revenue ( 23% vs. 4%).
- Those employed by business with 50 or more employees are significantly more likely to attend this years summit than those with fewer employees (24% vs. 5%).



Have you attended the Ontario Economic Summit in the past?  
Base: (n=207)



Will you attend the 2009 Ontario Economic Summit?  
Base: (n=207)

## Contact Information

**For more information about this project, please contact:**

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