

Survey on Productivity in Québec Businesses

About the Survey

The *Survey on Productivity in Québec Businesses* is conducted by the Institut de la statistique du Québec on behalf of the Ministère de l'Économie, de l'Innovation et de l'Énergie (MEIE). The aim of the survey is to better understand the productivity issues facing Québec businesses. The information we collect will be used to help make government strategies and initiatives more effective.

Mandatory participation

Your business has been selected to participate in this survey. Given the importance of the survey results, your business's participation is mandatory in accordance with the Act respecting the Institut de la statistique du Québec (CQLR, chapter I-13.011).

Confidentiality

You must provide your business data to the Institut de la statistique du Québec, as indicated in the questionnaire. The Institut de la statistique du Québec guarantees the confidentiality of the data provided as part of this survey.

For quality and training purposes, telephone conversations with the Institut de la statistique du Québec agents are recorded. Any person who does not want their conversation to be recorded can notify the agent at the beginning of the call.

Assistance

If you should require assistance, contact the Direction de la gestion de la collecte by phone at 1 800 561-0213 or by e-mail at productivite@stat.gouv.qc.ca.

Instructions

- ▶ **Do not return the questionnaire to us, either by mail or fax.**
- ▶ **Please fill out the questionnaire as soon as possible.**
- ▶ This survey covers the situation in Québec, please be sure your responses reflect only the portion of your business located in Québec.
- ▶ Answer to the best of your knowledge. If you do not have the exact information pertaining to certain sections of the questionnaire, please provide the best possible estimate.
- ▶ To answer all the questions, you may have to consult others working at your business.

Definitions

The definitions below refer to the items in the questionnaire marked with an asterisk (*).

Automation: Adoption of technologies, software or machines to carry out tasks and processes that were previously done manually by people. The main objective of automation is to improve operating efficiency, precision, speed and profitability while reducing human error, labour costs and lead times.

Business: Economic and social structure with at least one salaried employee working in an organized manner to produce goods or provide services for customers.

Capital assets: All tangible and intangible assets that the entity intends to keep and use repeatedly in its production processes for more than one year, and which provide an economic benefit to the owner. They include tangible fixed assets, such as land, buildings, machinery, tools, transportation equipment, furniture, fixtures and fittings, etc., as well as intangible fixed assets, such as goodwill, leasehold rights, intellectual property rights, software, etc. Fixed assets can depreciate over time, which is why they are subject to depreciation based on the nature of the asset.

Digital infrastructure: All the resources, technology, systems and services that enable the creation, storage, management, transmission and access to digital information. This infrastructure plays an essential role in the operation and growth of the digital economy. It facilitates connectivity, communication and collaboration between individuals, businesses and governments.

Digitization: Adoption of information technologies that are integrated into the processes, communications and overall services of a business or organization. This activity makes it possible to collect, store, analyze and share information in digital form and to communicate it to its staff, customers and suppliers.

Entrepreneurship: The act of taking the risk of investing capital and assuming responsibility for a team in order to carry out value-creating economic activities. In this sense, entrepreneurship is the act of creating a new business, but also of taking over an existing business.

Exports: Activity that consists in marketing a good or service on a market outside the province of Québec.

Innovation: New or improved products or processes (or a combination of both) that differ sensibly from an organization's previous products or processes and that have been made available to potential customers (product) or implemented by the organization (process).

Intellectual property: A distinct form of creation, such as an invention, a literary or artistic work, an image or a drawing, that can be protected by official or common law. There are several types of intellectual property, with the best known being patents, trademarks, industrial designs, trade secrets, and copyright.

Investment: Acquisition of movable or immovable property or of assets with a view to generating a profit and thus ensuring a return on the funds invested.

Organizational processes: Set of structured processes, activities and workflows that enable an organization to function efficiently and reach its objectives. These processes are designed to coordinate the business's resources (human, financial, material, etc.) and activities, while ensuring optimal communication and collaboration between the various stakeholders.

Productivity: Ratio between the result of a productive activity (goods and services) and the production factors used to obtain this production. A distinction is usually made between capital productivity (the ratio of value added to the volume of productive fixed capital), labour productivity (the ratio of value added to the number of hours worked) and overall factor productivity (the ratio of value added to the volume of the two factors, i.e., capital and labour).

Business life cycle

Startup: At this stage, the recently created organization makes its first sales, has little or no control over its processes, and has an emerging corporate culture.

Development or growth: At this stage, the organization experiences an increase in sales or number of employees resulting from the appropriation of a market or market share. The organization's financial situation has not yet stabilized, and internal processes need to be perfected.

Innovation cycle

Research and development: Process that includes the business's creative and systematic activities in order to increase the sum of knowledge, including knowledge of humanity, culture and society, and to design new applications from the available knowledge. The term "research and development" (R&D) covers basic research, applied research, and experimental development.

Stabilization or maturity: At this stage, the organization experiences slow growth, is well established on the market, has a stable financial situation, and had good control over its processes.

Decline or closure process: At this stage, the organization is considered mature and is characterized by a decline in sales. It cannot adapt to a changing market or is preparing the end of its activities.

Transfer: At this stage, the organization is engaged in a process of change in ownership. The main purpose of this change in ownership is to ensure the sustainability of the organization's operations.

Technology demonstration: The testing of a product or process in a controlled situation (e.g., in a laboratory) or in a real working or usage situation. This enables the product or process to be scaled up, improved, or further developed.

Marketing (of the innovation): Marketing of an innovative good or service.

List of programs/components that provide direct financial assistance for innovation or investment in support of business productivity (2022–2023)

Ministre de l'Agriculture, des Pêcheries et de l'Alimentation

Ministère de l'Agriculture, des Pêcheries et de l'Alimentation

- Programme d'appui au développement de l'agriculture et de l'agroalimentaire en région (PADAAR) [Regional Agriculture and Agri-Food Development Support Program]
- Fonds des pêches du Québec [Québec Fisheries Fund]
- Initiative ministérielle pour le développement des serres et des grands tunnels [Ministerial initiative for greenhouse and large tunnel development]
- Initiative ministérielle « Productivité végétale » [Ministerial initiative for vegetation productivity]
- Programme d'aide aux investissements en matière de bien-être animal et d'efficacité énergétique [Animal Welfare and Energy Efficiency Investment Support Program]
- Programme de soutien au développement des entreprises serricoles [Québec Greenhouse Business Development Support Program]
- Territoires : drainage et chaulage des terres [Territories: Soil Drainage and Liming]
- Innover
- Transformation alimentaire : robotisation et systèmes de qualité [Food Processing: Robotization and Quality Systems]

Financière agricole du Québec

- Programme Investissement Croissance [Growth Investment Program]
- Programme Investissement Croissance Durable [Sustainable Growth Investment Program]

Ministre de la Culture et des Communications

Ministère de la Culture et des Communications

- Programme d'aide à l'adaptation numérique des entreprises de la presse d'information écrite [Support Program for the Digital Adaptation of Print Media Companies]

Société de développement des entreprises culturelles (SODEC)

- Programme d'aide aux entreprises du livre et de l'édition [Support Program for Book and Publishing Companies]
- Programme d'aide aux initiatives innovantes [Support Program for Innovative Initiatives]

Ministre de l'Économie, de l'Innovation et de l'Énergie

Ministère de l'Économie, de l'Innovation et de l'Énergie – Investissement Québec

- Impulsion PME [SME Momentum]
- ESSOR
- Programme Innovation
- Stages d'innovation en entreprise [Corporate innovation internships]
- Mesure de soutien à l'emploi en recherche et en innovation (SERI) [Supporting employment in research and innovation]

Hydro-Québec Distribution

- Programme Démonstration technologique et commerciale [Technology and Business Demonstration Program]
- Programme Solutions efficaces [Efficient Solutions Program]

Ministre de l'Environnement, de la Lutte contre les changements climatiques, de la Faune et des Parcs

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- ÉcoPerformance
- Technoclimat

Ministre des Finances

Ministère des Finances

- Programme d'aide financière à l'investissement (PAFI) [Financial Assistance for Investment Program]

Ministre des Ressources naturelles et des Forêts

Ministère des Ressources naturelles et des Forêts

- Programme d'appui à la recherche et à l'innovation du domaine minier (PARIDM) [Mining Research and Innovation Support Program]
- Programme d'innovation en construction bois (PICB) [Wood Construction Innovation Program]
- Programme Innovation Bois [Wood Innovation Program]

Ministre du Tourisme

Ministère du Tourisme

- Entente de partenariat régional et de transformation numérique en tourisme (EPRTNT) 2022-2025 [Regional Tourism Partnership and Digital Transformation Agreement 2022–2025]
- Programme d'aide à la relance de l'industrie touristique (PARIT) [Tourism Industry Recovery Program]
- Programme de soutien au virage numérique des activités, des attractions et des événements touristiques québécois [Support Program for the Digital Transition of Québec Tourist Activities, Attractions and Events]
- Programme d'innovation touristique [Tourism Innovation Program]

Ministre des Transports et de la Mobilité durable

Ministère des Transports et de la Mobilité durable

- Programme d'aide à la réduction des émissions de gaz à effet de serre dans le transport routier des marchandises (Écocamionnage) [Assistance Program for the Reduction of Greenhouse Gas Emissions in the Trucking Industry (Ecotrucking Program)]
- Programme de soutien à la modernisation de l'industrie du transport par taxi (PSMITT) [Support Program for the Modernization of the Taxi Industry]
- Programme de soutien aux infrastructures de transport ferroviaire et à l'intégration modale (PSITFIM) [Rail Transportation and Modal Integration Infrastructure Support Program]

Government of Canada

Innovation, Science and Economic Development Canada (ISED)

- Strategic Innovation Fund (SIF)
- Innovative Solutions Canada
- Canada Digital Adoption Program (CDAP)

National Research Council Canada (NRC)

- Industrial Research Assistance Program (IRAP)

Canada Economic Development for Quebec Regions

- Support for Regional Quantum Innovation
- Business scale-up and productivity
- Jobs and Growth Fund – Quebec

List of innovation or investment tax measures in support of business productivity (Government of Québec – 2022–2023)

- Crédit d'impôt pour investissement et innovation (C3i) [Tax Credit for Investment and Innovation]
- Crédit d'impôt pour la recherche précompétitive en partenariat privé [Tax Credit for Private Partnership Pre-Competitive Research]
- Crédit d'impôt pour la recherche universitaire ou la recherche effectuée par un centre de recherche public ou par un consortium de recherche [Tax Credit for University Research or Research Carried Out by a Public Research Centre or a Research Consortium]
- Crédit d'impôt pour services d'adaptation technologique [Tax Credit for Technological Adaptation Services]
- Crédit d'impôt pour transformation numérique d'une entreprise de la presse d'information écrite [Tax Credit for the Digital Transformation of Print Media Companies]
- Crédit d'impôt relatif aux cotisations et aux droits versés à un consortium de recherche [Tax Credit for Fees and Dues Paid to a Research Consortium]
- Crédit d'impôt relatif aux salaires – R-D [Tax Credit for Salaries and Wages (R&D)]
- Déduction incitative pour la commercialisation des innovations (DICI) [Incentive Deduction for the Commercialization of Innovations]
- Congé fiscal pour les grands projets d'investissement [Tax holiday for large investment projects]
- Crédit d'impôt pour stage en milieu de travail [Tax Credit for an On-the-Job Training Period]
- Crédit d'impôt pour les grands projets de transformation numérique [Tax Credit Relating to Major Digital Transformation Projects]

Section 1 Business profile

Please think of the date the business started its operations, not the date of acquisition by the current owner.

1 What year did your business start operating?

2 In your opinion, at what stage of its life cycle is your business?

(Select only one)

- Startup*
- Growth*
- Maturity* or decline*
- Transfer*

3 Does your business export goods or services outside the province of Québec?

(Select only one)

- Yes, in Canada
- Yes, internationally
- Yes, in Canada and internationally
- No

4 In your opinion, how many competitors does your business have in its main market?

(Select only one)

- None
- Just one
- Two or three
- Four to eight
- More than eight
- Don't know

Section 2 Investments in automation or digitization technologies

5 Did you invest* in automation* (robotization) or digitization* (process computerization) technologies in the past three years?

- Yes
- No → [Go to question 8](#)

6 Which of the following has your business implemented in the past three years?

(Select all that apply)

- Implemented new equipment (hardware)
- Implemented new software

7 How would you characterize the size of your investments* in the past three years?

(Select only one)

- More than 20% of capital assets* (major/significant investment)
- 20% of capital assets or less (minor/backup investment)

8 Over the past three years, has your business's staff received any special or new training related to the adoption of automation* or digitization* technologies?

- Yes
- No

9 In your opinion, what are the main obstacles to implementing automation* or digitization* technologies in your business? (Select all that apply)

- Business productivity* is already sufficient
- Other priorities
- Access to financing (financial institutions, government, or others)
- Lack of in-house knowledge, or skills hard to find externally
- Overly restrictive regulations
- Underdeveloped digital infrastructure* (e.g., no high-speed Internet access)
- Lack of skilled labour to harness these technologies
- Resistance to change / inconclusive past experience(s)
- Lack of time
- Risk deemed too high or market uncertainty
- Business is at the transfer* or sale stage
- Lack of specialized labour

Section 3 Product and business process innovation

10 Does your business have staff who perform the following functions?

(Select all that apply)

- Production
- Marketing, sales and communications
- Human resources
- Finance and accounting
- Purchasing and logistics
- Information technology
- Research and development
- Management and general administration

11 Does your business use subcontractors in its production process for goods or services?

- Yes
- No

12 Over the past five years, how has your business acquired the specialized skills necessary for it to grow? (Select all that apply)

- Hired new employees with a university or college diploma
- Hired specialized or experienced labour
- Offered internships for university students
- Pooled (shared) specialized labour with another business
- Signed contracts with specialized consultants
- Provided training to current workers
- None

13 Which of the following actions has your business implemented in terms of product and business process innovation* in the past three years? (Select all that apply)

- Developed or improved products
- Implemented new services
- Developed, improved or adapted manufacturing processes
- Adopted new marketing methods
- Redesigned business model
- Implemented systematic continuous improvement approach
- Optimized production processes for goods or services
- Optimized management or control processes
- None

Section 4 External support needs of businesses

14 Has your business benefited from government support (federal, provincial or municipal) in the past five years to carry out a product or business process innovation* project or an automation* technology investment* project? (Select all that apply)

- Tax assistance for research and innovation; Tax assistance for investment*; Tax assistance for employability (e.g., R&D tax credit, investment and innovation tax credit, tax holiday for large investment projects, tax credit for an on-the-job training period, etc.)
- Financial assistance for research and innovation; Financial assistance for investment*; Financial assistance for employability (e.g., ESSOR, EcoPerformance, Innovation, and Technoclimat programs, corporate innovation internships, supporting employment in research and innovation [SERI], etc.)
- Guidance from a government or agency consultant (e.g., Investissement Québec, Offensive de transformation numérique, business incubator, École des entrepreneurs du Québec, Réseau Mentorat, Centre de transfert d'entreprise du Québec, etc.)
- Subcontracting of an innovation project to an agency (e.g., university research centre, college technology transfer centre, Centre de recherche industrielle du Québec, etc.)
- Worker training assistance (Ministère de l'Emploi et de la Solidarité sociale)
- Your business did not receive these types of government support

15 In your opinion, what are the two main factors that stop your business from getting the government assistance it may be eligible for? (Select up to two)

- Lack of knowledge about existing assistance
- Difficulty finding assistance
- Burdensome government paperwork to obtain assistance
- Long application processing times
- Assistance not needed
- Business not eligible for assistance
- Nothing is stopping our business from getting assistance

16 In which areas does your business need external help the most? (Select all that apply)

- Improving organizational processes*
- Developing entrepreneurial* skills
- Research and development* and pre-commercial technology* demonstration
- Intellectual property* protection
- Marketing* its innovations
- Breaking into new markets
- Adopting and implementing new technologies
- Training labour
- Support for business transfer (sale)
- External help not needed

17 Which of the following measures would be the most effective in increasing your business's productivity?

Please rank them in order of importance (1 being the most effective and 4 the least effective).

- Fewer regulations
- Lower taxes
- Financial assistance programs
- Specialized support

18 If you were the government, what measures would you suggest to encourage businesses to increase their productivity*? (Open question)

The Institut de la statistique du Québec would like to thank you for taking part in this survey.