

# INNOVATION: BDC VIEWPOINTS STUDY – JUNE 2012

Research and Market Intelligence at BDC



# Key ingredients for successful innovation projects

## Ambition

*"Humbition"*, as MIT experts would put it, is humble ambition, which contrasts with ego-driven ambition. Companies that perceive growth, improvement and innovation to be important tend to integrate it into their culture and tend to structure themselves better.

## Culture

A company that emphasizes growth, continuous improvement and innovation will foster an environment that stimulates sharing of knowledge and ideas, as well as enabling its employees to make mistakes and learn from them.

## Structure

Whether it is used to help organizations collect information, generate new ideas or execute innovative projects, structure plays a critical role in maximizing the likelihood of success.

## Communication

For any significant project to succeed, the lines of communication among employees, management, customers, partners and members of the extended network must be open so that a feedback loop can exist.

## Collaboration

Rarely will a single individual be able to carry out an innovative project single handedly. The fact of the matter is that strength often resides in a collection of individuals working together toward a common goal.

## Trust

This may in itself be the secret ingredient. Trust is a powerful motivator that leads people to give the best of themselves and enables individuals and companies to achieve greatness.

## Commitment

All of these elements are futile if there isn't commitment at all levels of the organization. Commitment is what distinguishes the ordinary from the extraordinary.

## Diversity

Research shows that diverse populations generate better outcomes than homogenous ones do. Diversity leads to different views, approaches and potential solutions to draw on.

## Agility

Carrying out increasingly complex endeavours in a rapidly changing environment requires agility based on responsiveness, versatility, flexibility, resilience, innovation and adaptation as defined by [David S. Albert](#) are vital to success.

# The five innovation profiles: Who are the entrepreneurs behind each of them?

	<b>16%</b> <b>Trailblazer</b>	<b>22%</b> <b>Vanguard</b>	<b>30%</b> <b>Driven</b>	<b>6%</b> <b>Challenger</b>	<b>26%</b> <b>Striver</b>
Main characteristics	Growth, improvement and innovation are both very important to them and very present in their operational mindset.	At least two ambition drivers are very important to them, and at least two of them are integrated operationally.	At least two ambition drivers are very important to them; however, they are not fully integrated into their operational mindset.	Ambition drivers are not very important to them, but they are very present in their operational mindset.	Ambition drivers are not important to them and are not very present in their operational mindset.
Gender	Men: 65% Women: 35%	Men: 84% Women: 16%	Men: 78% Women: 22%	Men: 90% Women: 10%	Men: 78% Women: 22%
Industry and market	Growing industry: 71% Emerging market: 37%	Growing industry: 67% Emerging market: 22%	Growing industry: 51% Emerging market: 22%	Growing industry: 57% Emerging market: 17%	Growing industry: 50% Emerging market: 17%
Have measures of innovation in place	Most of the measures of innovation are already in place	Several measures of innovation are already in place	26% do not have any measures of innovation in place	A few measures of innovation are already in place	36% do not have any measures of innovation in place
Main incentives to innovate	1. Grow business: 89% 2. Generate new business opportunities: 83% 3. Improve: 82%	1. Differentiate firm: 86% 2. Grow business: 82% 3. Generate new business opportunities: 75%	1. Differentiate firm: 70% 2. Grow business: 70% 3. Generate new business opportunities: 66%	1. Differentiate firm: 70% 2. Grow business: 69% 3. Generate new business opportunities: 66%	1. Generate new business opportunities: 55% 2. Differentiate firm: 50% 3. Improve: 50%

# **Context and methodology**

# Context and methodology

- > BDC e-mailed 2,539 invitations to complete the survey to members of the BDC ViewPoints panel, as at April 26, 2011. The survey was available online between June 12 and 25, 2012. A total of 656 entrepreneurs completed the survey, for a completion rate of 26%.
- > The responses from entrepreneurs were weighted according to region and company size. The BDC Research and Market Intelligence team analyzed the final results.

Innovation is one of the most-used buzzwords of the past decade. However, for many Canadian entrepreneurs, innovation remains just that. Through this study, the BDC ViewPoints team hopes to better understand certain aspects of innovation, such as:

- > entrepreneurial ambition
- > company culture and structure
- > motives and expectations
- > commitment

**Innovation:  
Explanation of the conceptual model**

# Innovation dynamics framework



In order to best help Canadians with their innovation efforts, the BDC Research and Market Intelligence team conducted some secondary research to get an overview of the concepts in the business literature. It found that innovation is often a **mindset that entrepreneurs internalize and then act upon**. This observation enabled the team to determine that innovation occurs on **at least three levels**: at the individual level, at the company or organizational level, and at the level of the environment in which they evolve. All three levels influence each other in a bi-directional way.

## First component: Individual

- > Innovative ideas stem from **individuals**, who are influenced by other individuals, by the company or organization in which they operate, and by the environment in which they exist. At the heart of any innovative idea is an individual or, more often than not, a group of individuals. What the literature seems to show is that **certain personality types are more conducive than others to successful innovation endeavours**.
  - In fact, some individuals are skilled at generating new ideas, while others excel at executing those ideas. The fact that some individuals are better than others at certain milestones in an innovative project is highlighted in a Forbes Insights article, *Nurturing Europe's Spirit of Entrepreneurship*. In it, the authors present the five personality types associated with innovation by using the "Big Five" or Five Factor Model (FFM), which measures personality traits on five vectors (openness, conscientiousness, extroversion, agreeableness and neuroticism).

## Second component: Company

- > **Companies** and organizations have a great **influence** on how their members operate. Companies have underlying values and beliefs, which are often conveyed through the **overall vision** and, more specifically, in the **mission statement**.
  - A company that believes that innovation, improvement and growth are important is more likely to encourage its employees to take risks, to develop new means of doing things, and to serve their clients better with new or improved offerings. Companies that are wired in such a manner tend to develop governing rules and structures that foster innovation, which ultimately may lead them to be more productive and competitive.

## Third component: Environment

- > The **environment** comprises not only the geographical place in which the company and individuals are located, but also the industry sector, existing alliances and partnerships, established networks, the market at large and government policies, to name a few other factors.
- > To maximize the output of innovative projects, it is important to capitalize on the **positive forces** within these three levels of the innovation dynamics framework.

# Innovation structure



After a preliminary review of the business literature pertaining to innovation, the BDC Research and Market Intelligence team contacted associate professor Laurent Simon from HEC Montreal, who helped the team identify the structural backbone of innovative projects.

## First component: Knowledge and experience

- > Once the innovation mindset has been internalized and integrated into the fabric of the team, there is a need to structure it. Innovation is all about **learning and changing**, which require tapping into people's **knowledge and experience**. That is the first element of the structure.

## Second component: Ideas and creativity


- > Knowledge and experience can sit dormant if no one activates them. The second component of the innovation structure is **ideas and creativity**. The most innovative organizations in the world tend to have both **formal and informal structures** in place to generate new ideas and capitalize on the creativity of their people. It is not enough for companies to say that they want to be innovative and improve; they must also structure themselves for future success.
- > It is true that many new ideas were stumbled upon or the result of an accident, but these types of eureka moments are few and far between, unfortunately. However, there are ways to increase the likelihood of such events occurring and to increase serendipity.

## Result: Innovation

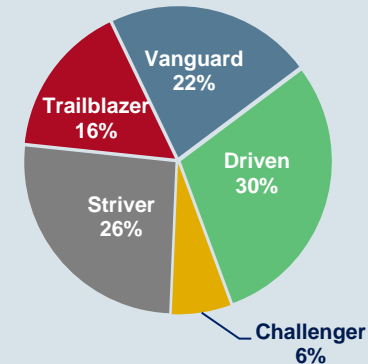
- > Innovation is an **ongoing process and state of mind** that requires a combination of key ingredients, such as ambition, culture, structure, communication, collaboration, trust, commitment, diversity and agility.



# Innovation profiles

- > One of the initial hypotheses is that the entrepreneur’s mindset, as well as what the organization values, will drive a lot of the initiatives and structure associated with innovative projects. To extract the different mindsets, the team asked two questions pertaining to the importance of three ambition drivers: growth, improvement and innovation. The team also asked about the presence of these drivers in the company’s daily operational mindset.
- > As a result, the team discovered the existence of five profiles. Here are a few distinctive characteristics of each group.
  - **Trailblazer (16%)**: Respondents in this sub-group indicated that growth, improvement and innovation are **very important** to their organization. They also mentioned that all three aspects are **very present** in their daily operational mindset. There is a statistically greater proportion of female entrepreneurs in this group.
  - **Vanguard (22%)**: Respondents in this sub-group indicated that at least two out of the three ambition drivers are very **important** to them. Furthermore, they have **integrated** at least two of the three ambition drivers (very present). There is a statistically greater proportion of men in this group.
  - **Driven (30%)**: Respondents in this sub-group indicated that at least two out of three ambition drivers are very **important** to them; however, they have **not yet fully integrated** these drivers into the organization’s operational mindset.
  - **Challenger (6%)**: This is the smallest of the segments. Respondents in this sub-group **do not** really find the ambition drivers to be very **important**, but they are **very much present** in the company’s daily operational mindset.
  - **Striver (26%)**: Respondents in this sub-group **do not** perceive growth, improvement and innovation to be very **important**, nor are they very much **present** in their company.
- > It is interesting to see that all five segments are **well represented** among the various regions, across companies of different sizes and in different industry sectors. This highlights the fact that **the mindset is not exclusive to a given type of business but is applicable to all.**
- > These five sub-groups will be used to emphasize that the entrepreneur and company mindset are important catalysts for everything else that follows.
- > In this report, references to these innovation profiles will be highlighted by a 

**INNOVATION PROFILES BASED ON THE IMPORTANCE GIVEN TO GROWTH, IMPROVEMENT, AND INNOVATION AND ITS PRESENCE (n=656)**



		Presence (very much present)			
		3	2	1	0
Importance (very important)	3				
	2				
	1				
	0				

Base: All respondents

## **Detailed results of the survey**



# Current state of industries and markets

**Most entrepreneurs compete in an industry that is growing, in a market that is relatively mature.**

## State of the industry

- > Nearly three out of five respondents indicated that their industry or sector of activity is **growing** (58%).
  - 💡 Entrepreneurs in the Trailblazer (71%) sub-group are more likely than others to be in a growing industry.
- > One quarter of entrepreneurs (26%) believe that their industry is **stagnant**.
- > One in ten panellists (11%) is in a tougher situation: their sector of activity is **shrinking**.
  - These individuals may need to look at adjacent or transformational innovation to turn the situation around.

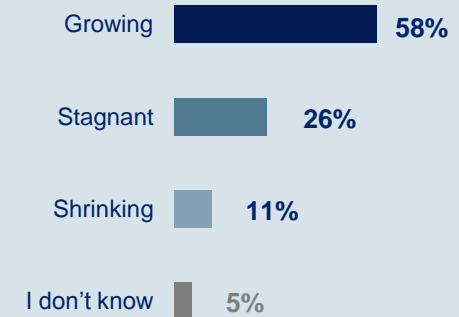
## State of the market

- > The majority of businesses are in a market environment defined as a **mature** market (72%).
  - 💡 More than three quarters of respondents in the Striver sub-group compete in mature markets (77%).
- > Nearly one quarter of respondents mentioned competing in an **emerging** market (23%)
  - 💡 This is the case for a statistically greater proportion of Trailblazers (37%).

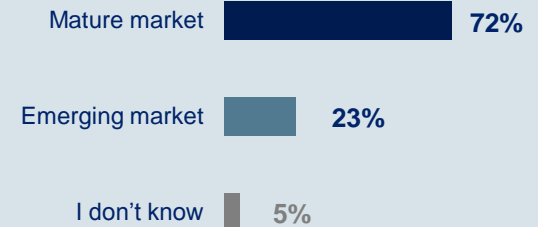
## Food for thought:

- > Authors Marcel Côté and Roger Miller developed a model called *the Six Games of Innovation* - a matrix using market maturity (emerging versus mature market) and product (and service) architecture. The interesting aspect of their model is that it can help entrepreneurs situate their innovative endeavours and define critical components for success. The authors add that **successful innovation often requires more marketing than research and development.**

*Is your industry or sector of activity growing, stagnant or shrinking? (n=655)*



*How would you define the market environment in which your company competes? (n=654)*



*Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base.*



# Key ambition drivers

**Key ambition drivers tend to be very or somewhat important to most entrepreneurs. However, improvement and growth are far better integrated in the fabric of businesses than innovation is.**

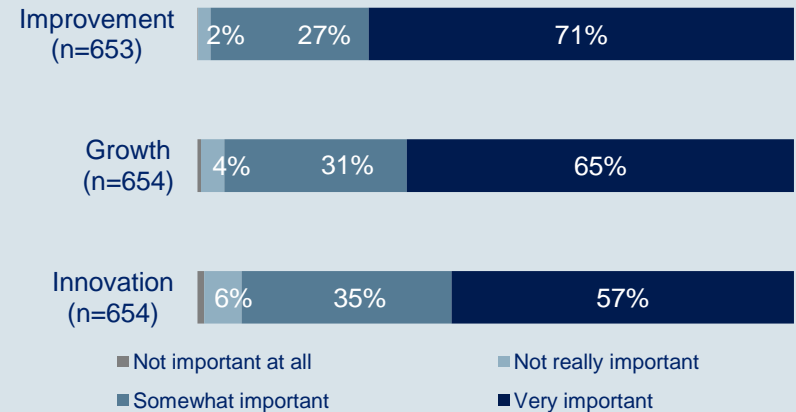
## Elements deemed important

- > Entrepreneurs tend to consider **improvement** the most important aspect among the three measured (71% deem it very important and 27% somewhat important). Just like the majority of individuals, most businesses aim each day to be better than they were the day before.
  - Improvement is very important to respondents in businesses with 50 or more employees (85%) and those in Western Canada (80%).
- > **Growth** is also an important driver for many entrepreneurs. Two thirds of those surveyed (65%) believe it is very important, while 31% feel it is somewhat important. Continuous growth is the basis of our capitalist economic model; however, this may need to be reassessed.
- > Among the three ambition drivers measured, **innovation** is the one deemed least important. In fact, fewer than three out of five entrepreneurs consider it to be very important (57%).

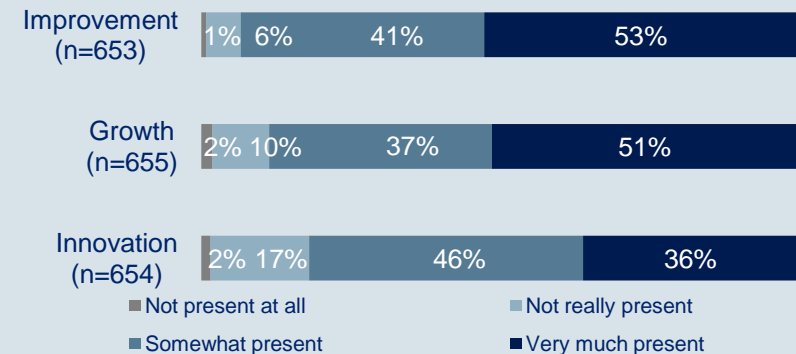
## Elements that are part of the daily operational mindset

- > Half of the entrepreneurs surveyed indicated that **improvement** (53%) and **growth** (51%) are very much present in their company's operational mindset.
  - Not only is improvement very important to businesses with 50 or more employees, but a statistically greater percentage of respondents in companies of this size indicated that improvement is very present in their daily operational mindset (69%).
- > Innovation is very much present in the mindset of 36% of the businesses in this study.

To what extent is each of the following aspects **important** to your organization as a whole?



To what extent is each of the following aspects currently part of your company's **daily operational mindset**?



Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base.



# Innovation elements present in the company

## Over three quarters of respondents have integrated at least one of the operational elements associated with innovation.

- > More than two out of five entrepreneurs currently **plan** for innovative projects (45%).
- > A significant number of entrepreneurs **pilot test** their innovative projects/ideas (43%), **track** ongoing innovative projects (40%) and **identify** pertinent ideas/projects (36%).
  - Pilot testing of innovative ideas/projects was mentioned more often by male respondents (46%) than female respondents (31%).
  - Nearly two thirds of businesses with 50 or more employees track ongoing innovative projects (63%).
- > One quarter of respondents said that their organization has **commercialized** innovative ideas/projects (26%).
  - This ratio is higher among companies with 20 to 49 employees (38%).
- > Nearly one quarter of those surveyed mentioned that their company allocates a **budget** for innovative projects (23%). And one in five enterprises (19%) has a **project manager** assigned to innovative projects.
  - Budgets for innovation exist in 43% of businesses with 20 to 49 employees and 41% of those with 50 or more employees.
  - Project managers are assigned to innovative projects in 37% of firms with 20 to 49 employees and 46% of those with 50 or more employees.
- > Tracking of **return on investment** occurs in one in five cases (18%).
- > One in five respondents has **not implemented** any of the operational elements (22%).
  - This ratio climbs to 27% among companies with fewer than five employees. It stands at 26% among the Driven sub-group and 36% among respondents in the Striver sub-group.

Among the following elements, which ones are currently in place in your organization?

Multiple answers allowed. (n=647)



Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base.




All the operational elements measured are much more present in the Trailblazer sub-group and, to a lesser extent, in the Vanguard sub-group.



# Incentives to innovate

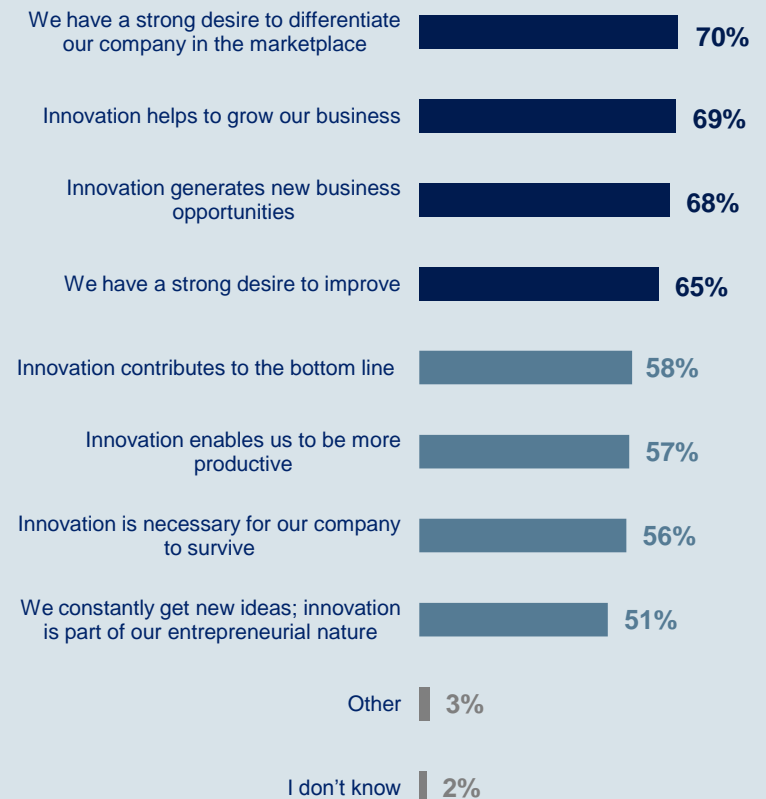
**There are several incentives to innovate: market differentiation, business growth, generation of new business opportunities and a strong desire to improve are the most commonly cited.**

- > The most frequently mentioned incentive to innovate is a strong desire for companies to **differentiate themselves in the marketplace** (70%).
  - According to Côté and Miller (see page 11), the desire to compete on the bases of differentiated products and of improved processes in a mature market is the prime driver of innovation strategies.
- > The second most common answer is that innovation **helps to grow the business** (69%). A nearly identical proportion said that innovation **generates new business opportunities** (68%).
- > Many entrepreneurs mentioned that they have a **strong desire to improve** (65%) and this drives their innovation initiatives.
  - This is the case for a significant portion of respondents in Western Canada (71%).
- > Over half of those surveyed mentioned that innovation **contributes to the bottom line** (58%), that it enables them to be **more productive** (57%), and that it is necessary for their business to **survive** (56%).
  - Men are more likely than women to say that innovation enables them to be more productive (60% vs. 47%).
  - The percentage of respondents who said that innovation is necessary for their company to survive is much higher in Quebec (69%) than elsewhere in Canada.
- > One in two entrepreneurs (51%) constantly gets new ideas; innovation is **part of their entrepreneurial nature**.

 Once again, the various incentives are ranked much more highly in the Trailblazer and Vanguard sub-groups than in others. The main incentive varies among the sub-groups.

- Trailblazer: Innovation helps to grow our business (89%).
- Vanguard, Driven and Challenger: We have a strong desire to differentiate our company in the marketplace (86%, 70% and 70% respectively).
- Striver: Innovation generates new business opportunities (55%).

*What are your company's main incentives to innovate - that is, to do things differently? Multiple answers allowed. (n=652)*



*Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base.*



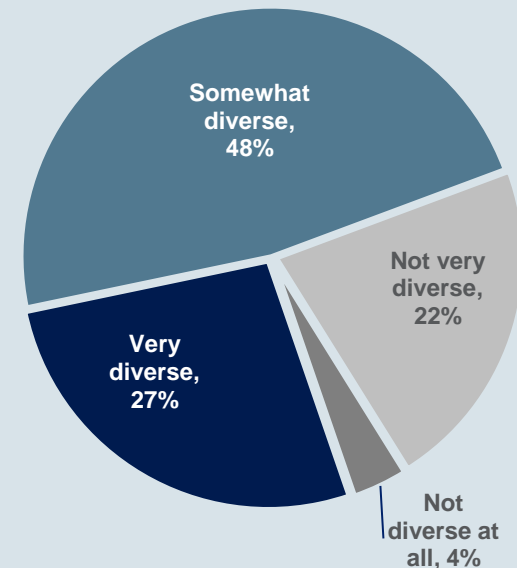
INDIVIDUAL

# Employee diversity

## Most respondents indicated that their employee population is somewhat diverse.

- > For many complex endeavours and cognitive problems, it appears that the more diverse the group, the greater the odds of obtaining diverse perspectives and the right solution.
  - In his book *The Wisdom of Crowds*, author James Surowiecki emphasizes that “the idea of the wisdom of the crowds is not that a group will always give you the right answer but that, on average, it will consistently come up with a better answer than any individual could provide.” In order for the mechanism of group wisdom to function properly, it is important that group members be independent of one another, that each member use his or her own private judgement, that the group itself be diverse and that results be aggregated. The important traps to avoid are small-group dynamics - where the strongest personality wins, not the strongest ideas - and groupthink - where members go along with what is being proposed because of homogeneity, erroneous assumptions or the desire not to rock the boat.
- > **One quarter of respondents** mentioned that their employee population was **very diverse** (27%).
  - The larger the company, the more likely it is that the employee population is diverse. In fact, the proportion of respondents who said their employee population is “very diverse” increases to 40% among businesses with 20 to 49 employees and to 42% among those with 50 or more employees.
  - This percentage is also higher among respondents for whom innovation is very important (32%) and/or very much present (38%).
- > Almost **half** of those surveyed indicated that their employee population tends to be **somewhat diverse** (48%).
- > One in five entrepreneurs does not think the human capital in their company is very diverse (22%).
  - 💡 Respondents in the Striver sub-group were more likely than others to say that their employee population is not very diverse (28%).
- > A relatively small percentage indicated that their employee population is not diverse at all (4%).

*To what extent is the employee population in your company diverse in terms of experience (work and life), education, cultural background, language and personality? (n=625)*



*Base: Respondents who have employees in their company. Those who answered “I prefer not to answer” were excluded from the calculation base.*



INDIVIDUAL

# Investment in employee training

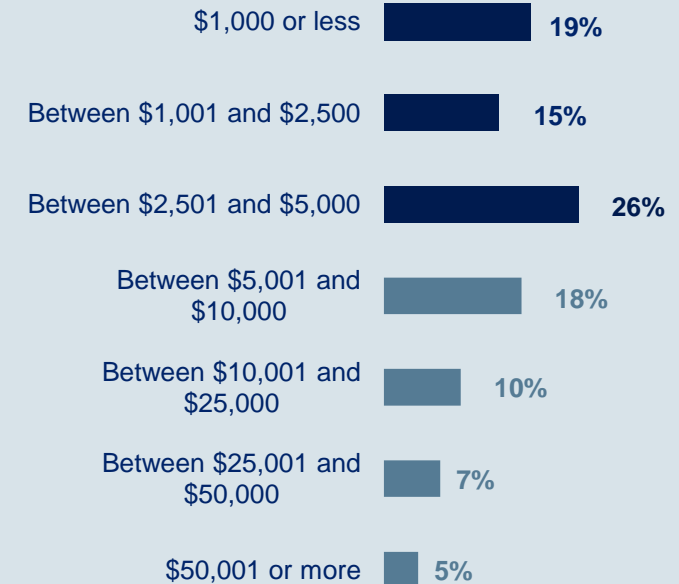
## Investment in employee training is highly correlated to company size.

- > The larger the business, the more it invests in employee training. The investments by company size are as follows.
  - Fewer than five employees: mean \$7,043; median \$2,000.
  - Between 5 and 19 employees: mean \$13,343; median \$5,000.
  - Between 20 and 49 employees: mean \$40,171; median \$15,000.
  - 50 employees or more: mean \$116,585; median \$32,000.
- > We asked this question because there seems to be a direct correlation between investing in employee training and innovation. Indeed, various studies have concluded that the more a company invests in employee training, the higher the likelihood of generating innovative outputs.



Trailblazer and Vanguard are the sub-groups that invest the most in employee training. It is important to remember that these respondents are also those who allocated the most importance to growth, improvement and innovation.

Approximately how much does your company invest annually in employee training? (n=427)



**Mean: \$18,900**  
**Median: \$5,000**

*Base: Respondents who have employees in their company. It was not mandatory for respondents to answer this question.*





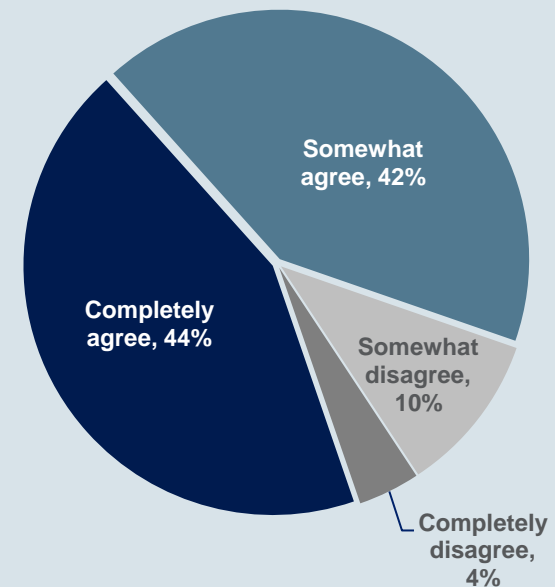
INDIVIDUAL

# Tolerance of employee mistakes

## ***“If you don’t make mistakes, you don’t make anything.”***

- > To foster an innovative environment, it has been demonstrated that it is of the utmost importance that employees feel that they can make mistakes, own up to them and try again. An environment that punishes mistakes will likely kill all innovative spirit.
- > It is really nice to see that the vast majority of entrepreneurs surveyed indicated that employees are allowed to make mistakes in their organization (completely agree 44%; somewhat agree 42%).
  - Interestingly, 46% of men versus 35% of women agree with the above-mentioned statement.
- 💡 A higher percentage of respondents in the Vanguard sub-group (56%) completely agree with the statement.
- > In other words, failure is another opportunity to learn.

*To what extent do you agree with the following statement? “In our organization, employees are allowed to make mistakes.” (n=626)*



*Base: Respondents who have employees in their company. Those who answered “I prefer not to answer” were excluded from the calculation base.*



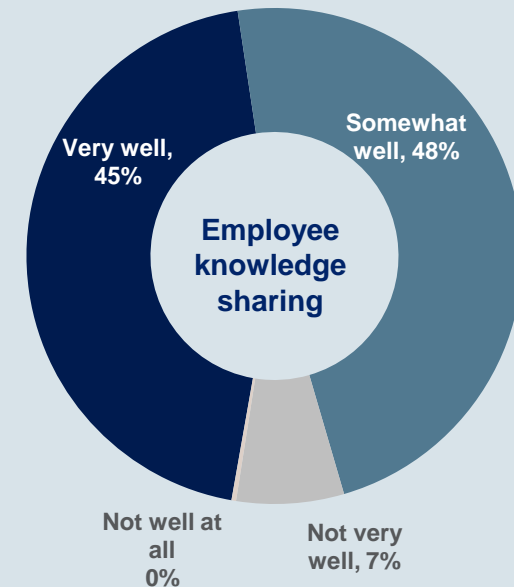
INDIVIDUAL

# Employee knowledge sharing

## Over 90% of entrepreneurs believe that their employees share information well with one another.

- > Overall, 45% of entrepreneurs said that their employees share information **very well** with one another.
  - This percentage is at its highest among respondents in businesses with fewer than five employees (56%). This aspect is often viewed as one of the strengths of small businesses.
  - 💡 Respondents in the Trailblazer sub-group (62%) are also more likely than their peers to feel that their employees share information very well with one another.
  - Over half of those who said that innovation (57%), improvement (55%) and growth (51%) are very much present in their daily operational mindset believe their team members share information very well with one another.
- > Nearly half of those surveyed indicated that their employees share information **somewhat well** with one another (48%).
  - Over half of businesses with five or more employees gave this answer.
  - 💡 So did larger proportions of respondents in the Driven (54%) and Striver (55%) sub-groups.
- > Fewer than one in ten entrepreneurs (7%) mentioned that their employees do not share information very well with one another.
- > One of the common reasons that people resist sharing information is that they believe that “knowledge is power,” which it is. However, ultimately, holding on to it is not a positive thing for an organization as a whole.

Overall, how well do employees in your organization share information with one another?  
(n=625)



Base: Respondents who have employees in their company. Those who answered “I prefer not to answer” were excluded from the calculation base.



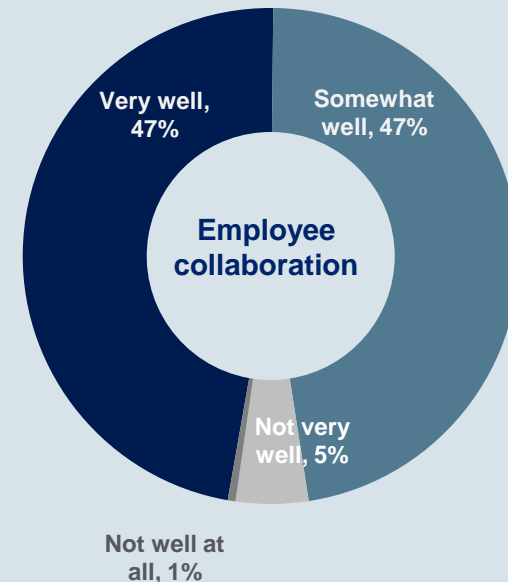
INDIVIDUAL

# Employee collaboration

## The vast majority of entrepreneurs said that their employees collaborate very or somewhat well together.

- > In order for the Gestalt principle to take effect, team members need to collaborate well with one another. If not, a group will be only as good as the sum of its parts - no more, and maybe less.
- > Ultimately, we see that **nearly half** of all respondents mentioned that their employees **work very well together and collaborate with one another** (47%).
  - Once again, smaller organizations (i.e., fewer than five employees) have a certain advantage. In fact, 55% of them said that their employees collaborate very well.
  - 💡 Respondents in the Trailblazer (66%) and Vanguard (57%) sub-groups are more likely than entrepreneurs in the other segments to feel that their employees work well together.
  - Lastly, a greater percentage of entrepreneurs for whom improvement (60%) and innovation (61%) are very much present believe their teams work well together and collaborate.

Overall, how well would you say teams in your company work well together and collaborate?  
(n=625)



Base: Respondents who have employees in their company. Those who answered "I prefer not to answer" were excluded from the calculation base.



## INDIVIDUAL

# Reasons for lack of employee collaboration

Personality conflicts, working in silos, workload and generational differences are among the main reasons employees do not collaborate well with one another. Capitalizing on the human dimension of workforce dynamics, highlighting the contribution of each member, and fostering an environment of trust and respect will ultimately alleviate many of the problems that prevent adequate team collaboration.



- > **Personality issues** are the main reason employees do not collaborate well with one another, according to respondents. Obviously, there are no quick, easy fixes for personality conflicts. Employees can reduce them by gaining a better understanding of other team members, their role and their contribution in the organization. Getting to know colleagues on a different level can often help remove some of these hurdles.
- > **Working in silos** is relatively common in larger organizations. Once again, getting a better understanding of team and individual contributions may help overcome some of the obstacles that silos create. Furthermore, the input of complementary colleagues can very often enhance the quality of one's contribution.
- > Several respondents indicated the **amount of work** hinders collaboration significantly. Some employees are too busy with their own projects to get involved in their colleagues' work.
- > Moreover, a few respondents highlighted the fact that some employees don't ask for help because they don't want to be a **nuisance** to their colleagues or be perceived as incapable.
- > Although mentioned to a much lesser extent than the previous reasons, **generational differences** do seem to play a role in employee collaboration. The "us" versus "them" mentality that pits new employees against more senior employees can be quite detrimental. Human resources professionals emphasize the positive influence of team-building exercises on removing these barriers.

*Base: Respondents who have employees in their company and those who indicated that their employees do not work well together. It was not mandatory for respondents to answer this question.*



# Knowledge management

## Nearly two thirds of entrepreneurs mentioned that their company culture absolutely encourages employees to collect and share insights on an ongoing basis.

- > The knowledge of an organization resides in its members and in their ability to share knowledge, experiences and best practices with one another so that the removal of one element or individual does not result in the loss of the insight previously gained. To ensure that relevant information continues to flow throughout an organization, the organization must value and encourage such behaviour.
- > Nearly **two thirds** of entrepreneurs (64%) **absolutely believe** that their company culture encourages employees to collect and share knowledge, experience or best practices on an ongoing basis, whether implicitly (i.e., overall behaviours) or explicitly (i.e., formal documents).
  - A higher proportion of businesses with fewer than five employees (70%) believe their company's culture absolutely encourages collection and dissemination of relevant insights.
-  This is also the case for a larger percentage of Trailblazers (81%) and Vanguarders (73%). Aside from the latter segments, respondents for whom innovation is very important (73%) and very present (78%) are more likely to say that their company culture encourages employees to collect and share knowledge, and build the knowledge pool.
- > Although the proportion of respondents who indicated that their company culture does not really (7%) or does not at all (2%) encourage its employees to collect and share insights is relatively low, it is unfortunate that these businesses do not enhance the influx of fresh ideas.
-  The percentage of respondents who said that their company does not really encourage employees to collect and share knowledge, experience or best practices on an ongoing basis is higher among respondents in the Driven (9%), Challenger (10%) and Striver (16%) sub-groups.

*Does your company culture encourage employees to collect and share knowledge, experience or best practices on an ongoing basis? This culture may be communicated through the company's vision, mission statement, and other formal documents or informal communications.*  
(n=625)



*Base: Respondents who have employees in their company. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base.*



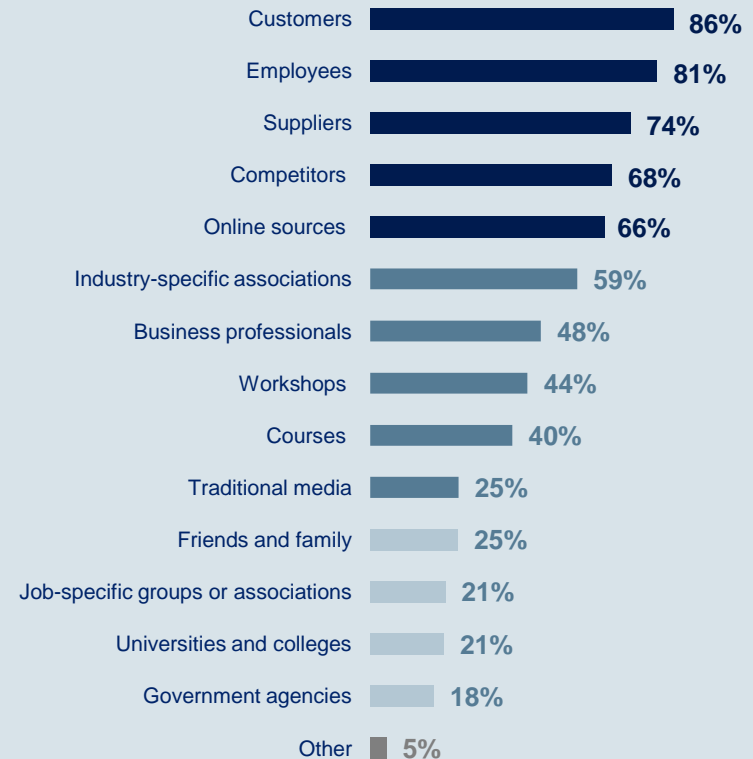
# Sources of knowledge and ideas

## Customers, employees and suppliers are the main sources used to gain knowledge and generate new ideas.

- > No customers, no business! It is, therefore, not surprising that **customers** are the most commonly cited source of knowledge and new ideas (86%).
- > **Employees** provide a wealth of information to any successful SME (81%).  
 Employees were mentioned by 98% of respondents in firms with 50 employees or more and by a large proportion of Trailblazers (87%) and Vanguards (89%).
- > Other businesses, whether they be **suppliers** (74%) or **competitors** (68%), are critical sources of knowledge and ideas.
- > We also see that **online sources** provide a wealth of information for many respondents (66%).
- > Although mentioned by fewer respondents, components of an entrepreneur's business network - namely, **industry-specific associations** (59%) and **business professionals** (48%)—provide key insights.
- > Structured educational elements, such as **workshops** (44%) and **courses** (40%), also enable organizations to enrich their people and, consequently, themselves.
- > Other possible sources were mentioned by one in four entrepreneurs or fewer: traditional media (25%), friends and family (25%), job-specific groups or associations (21%), universities and colleges (21%), government agencies (18%), and other (5%).  
 Interestingly, Trailblazers are more likely than others to say that they capitalize on the input of friends and family (36%) to gain knowledge and generate new ideas.
- > In the "other" category, respondents often mentioned books, conferences (including webinars) and experience.
- > **It is quite useful for entrepreneurs to pool information and ideas from all the sources available. The reality is that problems or issues faced by an organization are rarely exclusive to it. Chances are that someone else out there has already experienced something similar.**

What sources are used to gain knowledge and generate new ideas in your organization?



Multiple answers allowed. (n=655)



Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base.

# Structures for capturing knowledge

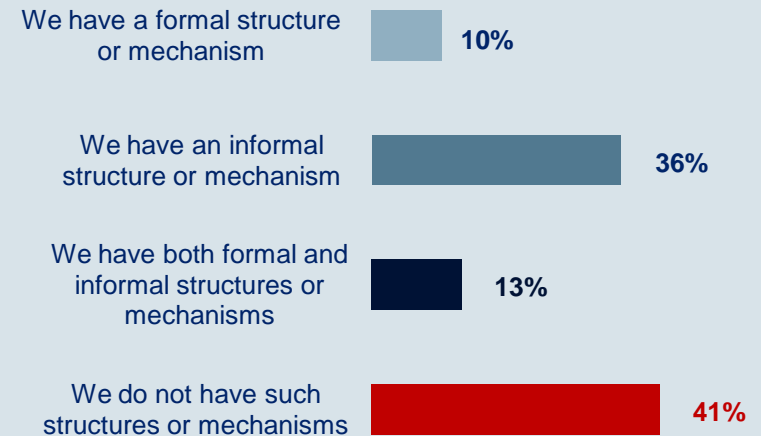
**Having a structure in place to capture knowledge is one of the most effective ways to ensure that insights are accessible and not dependent on one individual.**

- > **Over half** of the businesses (59%) have a **structure** or **mechanism** in place for capturing knowledge stemming from employees, the market or the business environment.
  - A significantly higher percentage of respondents in businesses with 50 or more employees (77%), entrepreneurs in Western Canada (63%) and men (61%) indicated that they had some kind of structure in place.
  -  So did a larger proportion of Vanguards (72%) and Trailblazers (69%).
- > **Few** businesses have a **formal structure** (10%).
- > For the most part, entrepreneurs said that their business has an **informal** structure or mechanism in place for capturing knowledge (36%).
  - This percentage is much higher among male entrepreneurs (39%) than among female entrepreneurs (24%).
- > Just over one in ten panellists indicated that they had both formal and informal structures or mechanisms in place (13%).
- > The main observation is that a significant percentage of respondents do not have any structure for capturing relevant insights (41%).
  -  The percentage of respondents without any structures or mechanisms is much higher among those in Atlantic Canada (62%), Strivers (60%), female entrepreneurs (51%), businesses with fewer than five employees (45%) and those with 5 to 19 employees (41%).

*Is there some kind of structure or mechanism for capturing knowledge stemming from employees, the market or the business environment?  
(n=619)*

*A **formal structure** could be a central repository that employees can access as needed or designated people who monitor aspects pertaining to their areas of expertise and share their findings with colleagues, etc.*

*An **informal structure** could be an employee suggestion box, online monitoring, etc.*




*Base: Respondents who have employees in their company and who indicated using any sources for gaining knowledge and generating ideas. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base.*

# Knowledge organization and accessibility


## For maximum relevance, a structure for capturing knowledge must be organized and accessible.

> Respondents who indicated that their company had a structure - whether it was formal, informal or both - were asked to define their structure in terms of its organization and accessibility.

> **More than four out of five** entrepreneurs (81%) said that their **structure is organized** (very organized, 24%; somewhat organized, 57%).

 A significantly larger percentage of Trailblazers (43%) said that their structure is very organized. This is also the case for those who think that innovation is very important (30%) and very much present (35%).

> With regard to **accessibility**, the figure climbs to 91%, which breaks down as follows: 40% think their structure is very accessible and 51% think it is somewhat accessible.

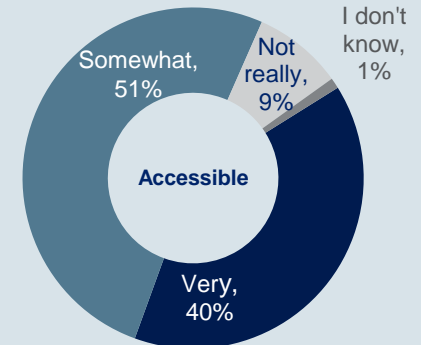
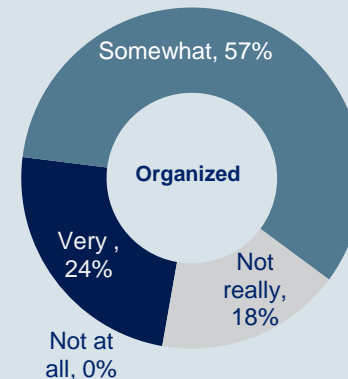
 The accessibility of the different structures for capturing knowledge **varies considerably among the different segments.**

- Trailblazers (61%) and Vanguards (48%) are more likely to perceive their structure as accessible.
- Those in the Driven sub-group are more likely to think that their structure is somewhat accessible (62%).

> Overall, fewer than one in ten respondents (9%) sees their structure as being **not really accessible.**

 This percentage climbs to 16% among Challengers and 17% among Strivers.

*To what extent is the knowledge captured organized and accessible to employees? "Organized" refers to how easily employees can find the desired information, while "accessible" refers to the extent to which all pertinent employees have access to the information? (n=376)*






*Base: Respondents who have employees in their company and who indicated having a formal or an informal structure in place to organize captured knowledge. Those who answered "I prefer not to answer" were excluded from the calculation base.*





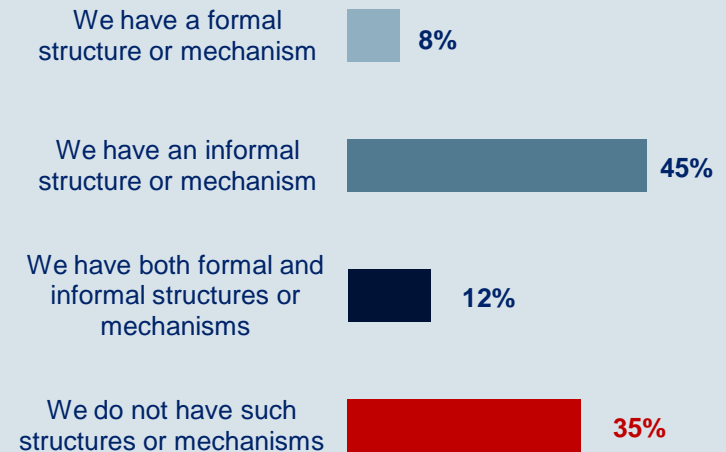
# Encouraging employees' innovativeness

## Two thirds of businesses have a structure or mechanism for encouraging employees to share ideas, generate new ones and innovate.

- > A substantial percentage of entrepreneurs indicated that their company has a **structure or mechanism** for encouraging employees to **share ideas, generate new ones and innovate** (65%).
  -  Although respondents in the Challenger sub-group do not necessarily allocate a lot of importance to the three ambition drivers, the fact that these drivers are present in the organization is confirmed by the fact that more of these companies have a structure for encouraging employee innovation (81%).
  -  Percentages for this question also tend to be greater among Trailblazers (78%) and Vanguarders (74%).
    - The existence of such structures may be part of the reason certain respondents think that growth, improvement and innovation are very much part of their company's daily operational mindset.
- > Generally speaking, such structures or mechanisms are **informal** (45%). A relatively small percentage of respondents have a strictly formal structure (8%), while a few more have both formal and informal structures (12%).
- > Lastly, 35% of businesses do not have a structure or mechanism for encouraging employees to share ideas, generate new ones and innovate. These businesses are missing out on an incredible tool to leverage the insights of their employees.
  -  The absence of such structures or mechanisms is greater among the Driven (42%) and Striver (48%) sub-groups.
- > **Many experts will agree that stimulating innovation in organizations is more than just a structural challenge; it's also a cultural one!**

*Is there some kind of structure or mechanism for encouraging employees to share ideas, generate new ones and, ultimately, innovate? (n=623)*

*For example, some businesses ask employees to spend a certain percentage of their time developing new ideas or working on projects that are not part of their usual tasks. Other businesses organize "lunch and learn" sessions in which employees share new work or new ideas with their peers.*



*Base: Respondents who have employees in their company. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base.*



# Types of innovation

## Entrepreneurs tend to allocate their innovation resources in a similar manner, regardless of their region or company size.

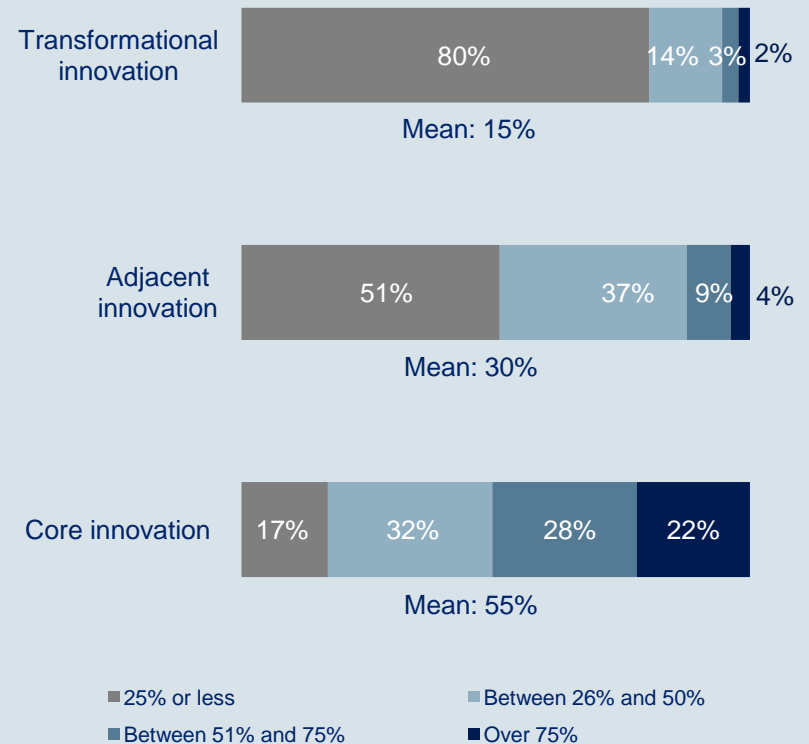
- > It is interesting to see that entrepreneurs, regardless of their region or company size, tend to allocate the **same percentages of their innovation resources to the three types of innovation.\***
- > On average, respondents allocate 55% of their innovation resources to core innovation, also known as incremental innovation. They spend another 30% on adjacent innovation and 15% on transformational innovation, also called radical innovation.
  - The important thing to remember, which was highlighted in a recent *Harvard Business Review* article, is that potential returns are inversely related to investments—in other words, transformational innovation can yield the highest return and core innovation the smallest.
  - Although there are certain differences among companies in different sectors of activity, the main statistical difference exists between male and female entrepreneurs. On average, men allocate 53% of their resources to core innovation, whereas women tend to invest 61% of their resources in it. Consequently, men invest more in adjacent and transformational innovation than women do.

### DESCRIPTIONS:

- > **Core innovation** involves optimizing or improving existing products or services for an existing customer base (e.g., building a better mousetrap).
- > **Adjacent innovation** involves expanding a product or service the company already provides well, thereby expanding its customer base (e.g., using the knowledge gained from building a good mousetrap to build a trap for a particular type of rodent found only in South America).
- > **Transformational innovation**, also called “radical innovation,” involves developing breakthroughs and inventing products or services for markets that may not yet exist (e.g., developing a revolutionary product that eliminates the need for traps altogether).

Source of terms used: *Harvard Business Review*. Examples were developed by BDC.

Based on the following descriptions,\* what proportions of your company's total innovation resources (including employees' time and efforts) are invested in each of them? (n=565)





Base: All respondents. It was not mandatory to answer this question.



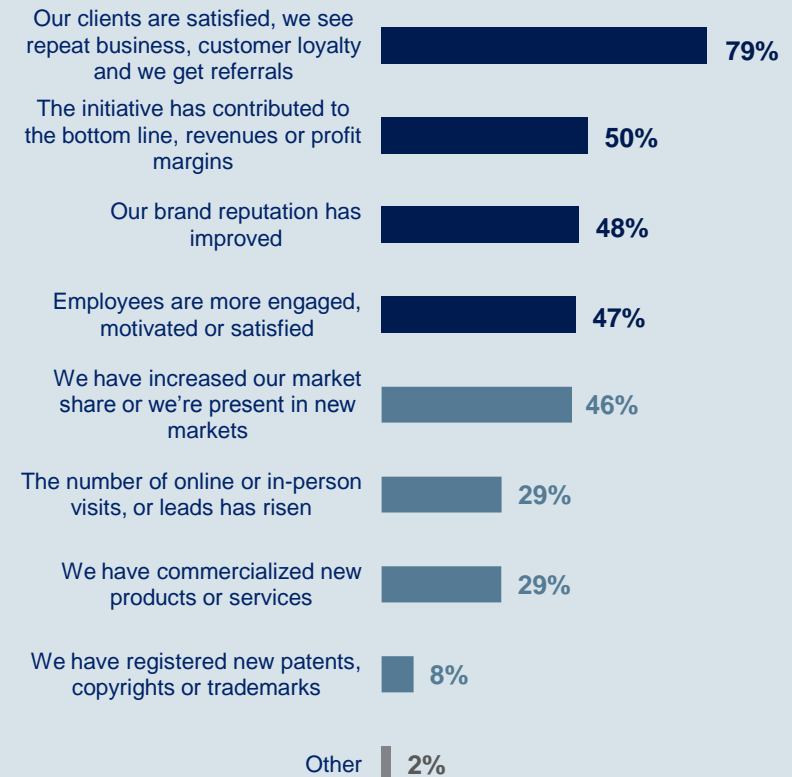
# Measuring innovation success

## “Client satisfaction, loyalty, repeat business and referrals” is the most-cited success measure of innovative projects.

- > Satisfied clients who come back and give **referrals** are what every business strives for, so it is not surprising that most businesses consider client satisfaction the main measure of the success of their innovative projects.
  - Although it is the main measure of success for both women and men, women are more likely than their male colleagues to say so (86% vs. 77%).
- > Half of the entrepreneurs surveyed also measure the success of their innovative projects by looking at their contribution to the **bottom line** (50%), their impact on **brand reputation** (48%), and their impact on **employee engagement, motivation or satisfaction** (47%).
  - The impact on the bottom line was mentioned by a higher proportion of businesses with 20 to 49 employees (66%).
  - Measuring the impact on brand reputation to determine success is more common among men (50%) than women (39%).
  - The impact on employees was mentioned by a significantly larger percentage of businesses with 50 or more employees (69%), those with 20 to 49 employees (62%), those with 5 to 19 employees (56%), and respondents in Quebec (57%).
- > **Increased market share or increased presence in new markets** is a measure of success for 46% of respondents.
  - The figure increases dramatically among businesses with 50 or more employees (69%). It is also statistically higher among men (50%) than women (32%).
  - A greater percentage of respondents in the Vanguard sub-group (59%) use market share or presence as a success measure.
- >  Although it was selected by a significantly smaller proportion of respondents, the number of **online or in-person visits** (29%) and commercialization of **new products and services** (29%) are measures of success for more than a quarter of those surveyed.
  - A significantly larger proportion of Trailblazers measure their success by the number of online or in-person visits (49%), commercialization of new offerings (44%), and registration of new patents, copyrights or trademarks (16%).
- >  Although it was selected by a significantly smaller proportion of respondents, the number of **online or in-person visits** (29%) and commercialization of **new products and services** (29%) are measures of success for more than a quarter of those surveyed.

What are your company's main measures of the success of a given innovative project or a collaborative problem-solving endeavour?

Multiple answers allowed. (n=623)



Base: All respondents. Those who answered “I don't know” or “I prefer not to answer” were excluded from the calculation base.

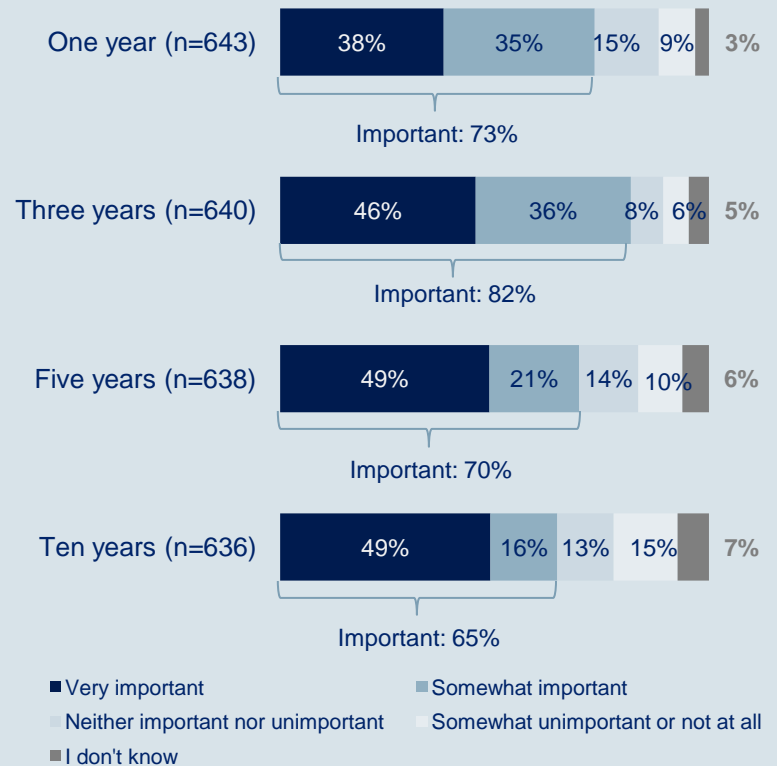


# ROI on innovation, by timeframe

## The timeframe within which a project must ideally yield some results is three years.

- > The proportion of respondents who indicated that it is very important that investments in innovative projects yield results after a given period tends to increase as the timeframe widens, but levels off after five years. In fact, 38% of respondents find it very important to see a return on investment after one year, 46% after three years, and 49% after 5 and 10 years.
- > Results indicate that it is important that projects generate returns within three years (82%). **This leads us to believe that the majority of entrepreneurs operate within a three-year span.**
  - This seems to make sense. Putting pressure on projects to deliver results within a year may be detrimental because the focus will be on delivery and not necessarily on quality.
  - On the other hand, a timeframe that exceeds three years may not convey the required urgency.
- > There are some interesting **statistical differences** worth noting.
  - First, it is very important (43%) for those for whom growth is very important to see a return on innovative investments within one year, a sentiment echoed by businesses with fewer than five employees (43%).
  - Secondly, a significantly greater percentage of respondents in Ontario (52%) and Western Canada (50%) indicated that it is very important to see a return within three years.
- 💡 Trailblazers (63%) are also more likely to expect a return on their innovation investments within three years than respondents in the other sub-groups.
- > Finally, it is worth noting that it is between the **three and five-year mark** that most respondents start **emphasizing the urgency of a return on investment**. Not only do nearly half of them believe it is very important, this threshold seems to be the tipping point where if, in most cases, it is going to happen, it needs to happen now.

How important is it for your company to see a return on innovation investments within each of the following time periods?

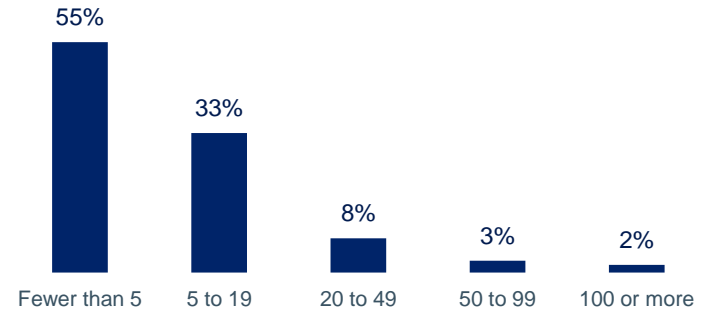
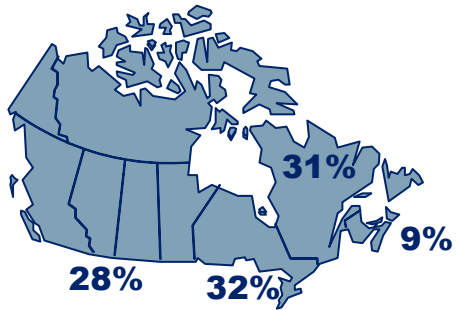


Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base.

## **Respondent profile**

# Respondent profile

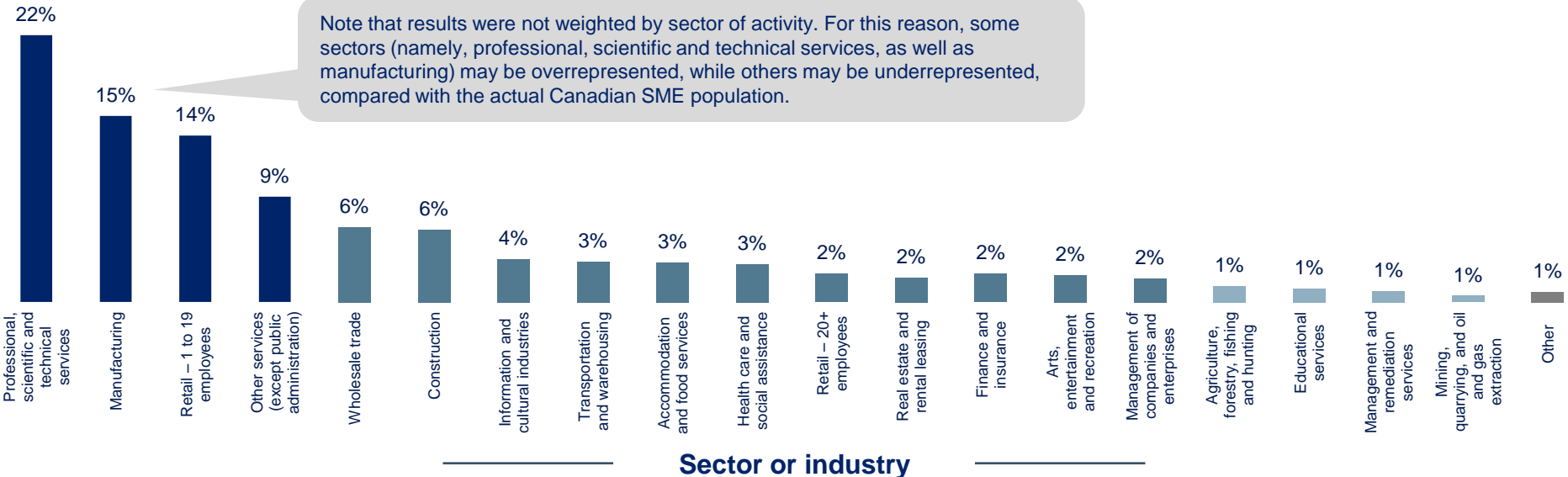
n=656



## Region

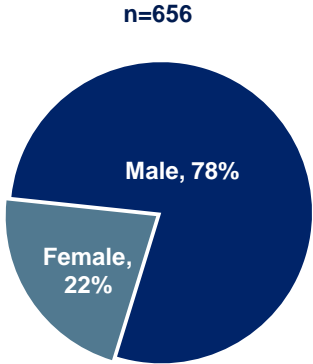
## Number of employees

Note that results were not weighted by sector of activity. For this reason, some sectors (namely, professional, scientific and technical services, as well as manufacturing) may be overrepresented, while others may be underrepresented, compared with the actual Canadian SME population.

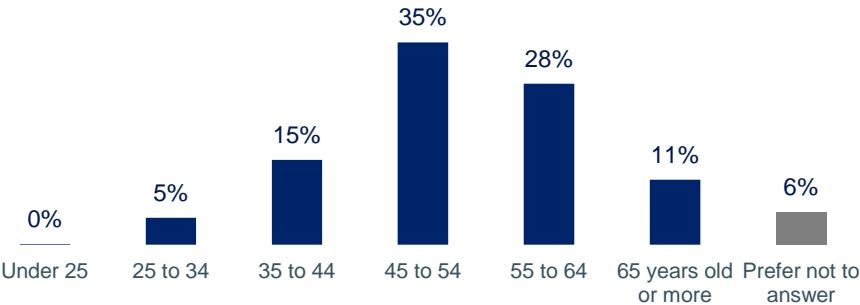


Base: All respondents. Note that results have been weighted by region and business size.

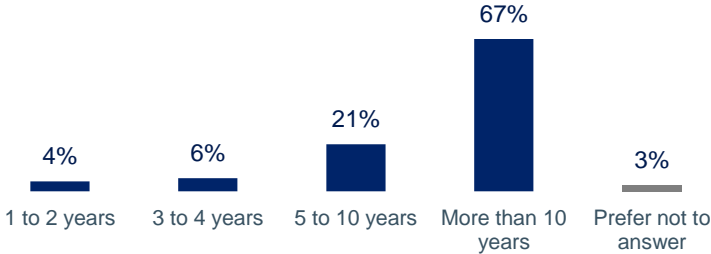
# Respondent profile (cont'd)



Gender



Age



Company years in business

Base: All respondents. Note that results have been weighted by region and business size.

## **Appendix:**

**Survey results, by region, business size and industry**





ENVIRONMENT

# Current state of industries

> Is your industry or sector of activity growing, stagnant or shrinking?

	Total (n=655)	Atlantic Canada (n=48)	Quebec (n=145)	Ontario (n=200)	Western Canada (n=262)
Growing	58%	61%	61%	51%	62%
Stagnant	26%	28%	29%	29%	22%
Shrinking	11%	8%	6%	15%	10%
I don't know	5%	3%	4%	5%	6%

	Total (n=655)	Fewer than 5 employees (n=225)	5 to 19 employees (n=260)	20 to 49 employees (n=94)	50 or more employees (n=76)
Growing	58%	57%	57%	65%	61%
Stagnant	26%	27%	26%	27%	24%
Shrinking	11%	10%	13%	6%	16%
I don't know	5%	6%	4%	2%	0%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base.



ENVIRONMENT

# Current state of industries (cont'd)

> Is your industry or sector of activity growing, stagnant or shrinking?

	Total (n=655)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=73)	Other services (except Public Administration) (n=54)	Construction (n=48)	Professional, Scientific and Technical Services (n=128)	Health Care and Social Assistance (n=23)*	Accommodation and Food Services (n=25)*	Wholesale Trade (n=41)	Manufacturing (n=112)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Growing	<b>58%</b>	65%	41%	64%	54%	65%	80%	48%	37%	54%	93%	49%
Stagnant	<b>26%</b>	14%	35%	19%	24%	23%	7%	24%	54%	33%	7%	33%
Shrinking	<b>11%</b>	15%	20%	6%	11%	5%	14%	28%	9%	11%	0%	12%
I don't know	<b>5%</b>	6%	4%	12%	11%	6%	0%	0%	0%	3%	0%	6%

	Total (n=655)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=14)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Growing	<b>58%</b>	32%	74%	68%	63%	56%	93%	75%	26%	32%	100%
Stagnant	<b>26%</b>	25%	17%	26%	10%	37%	3%	25%	74%	0%	0%
Shrinking	<b>11%</b>	24%	9%	6%	15%	8%	4%	0%	0%	68%	0%
I don't know	<b>5%</b>	19%	0%	0%	12%	0%	0%	0%	0%	0%	0%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



ENVIRONMENT

# Current state of markets

> How would you define the market environment in which your company competes?

	Total (n=654)	Atlantic Canada (n=48)	Quebec (n=145)	Ontario (n=200)	Western Canada (n=261)
Emerging market	23%	30%	18%	24%	22%
Mature market	72%	63%	78%	70%	73%
I don't know	5%	7%	4%	6%	5%

	Total (n=654)	Fewer than 5 employees (n=225)	5 to 19 employees (n=260)	20 to 49 employees (n=93)	50 or more employees (n=76)
Emerging market	23%	26%	19%	18%	17%
Mature market	72%	69%	75%	81%	82%
I don't know	5%	5%	6%	1%	2%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base.



ENVIRONMENT

## Current state of markets (cont'd)

> How would you define the market environment in which your company competes?

	Total (n=654)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=73)	Other services (except Public Administration) (n=54)	Construction (n=48)	Professional, Scientific and Technical Services (n=128)	Health Care and Social Assistance (n=23)*	Accommodation and Food Services (n=25)*	Wholesale Trade (n=41)	Manufacturing (n=111)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Emerging market	<b>23%</b>	16%	15%	24%	17%	29%	47%	9%	11%	27%	25%	4%
Mature market	<b>72%</b>	84%	84%	64%	79%	68%	36%	85%	82%	71%	53%	83%
I don't know	<b>5%</b>	0%	2%	12%	4%	3%	17%	7%	7%	2%	22%	13%

	Total (n=654)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=14)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Emerging market	<b>23%</b>	19%	12%	11%	20%	19%	49%	38%	44%	0%	33%
Mature market	<b>72%</b>	81%	88%	89%	65%	81%	44%	50%	56%	100%	67%
I don't know	<b>5%</b>	0%	0%	0%	15%	0%	7%	13%	0%	0%	0%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Key ambition drivers: Importance of *improvement* to the organization

> To what extent is the following aspect important to your organization as a whole: **Improvement**

	Total (n=653)	Atlantic Canada (n=48)	Quebec (n=145)	Ontario (n=197)	Western Canada (n=263)
Very important	71%	78%	62%	68%	80%
Somewhat important	27%	18%	38%	30%	18%
Not really important	2%	3%	0%	3%	2%
Not important at all	0%	0%	0%	0%	0%

	Total (n=653)	Fewer than 5 employees (n=223)	5 to 19 employees (n=260)	20 to 49 employees (n=94)	50 or more employees (n=76)
Very important	71%	68%	74%	79%	85%
Somewhat important	27%	30%	24%	19%	15%
Not really important	2%	2%	2%	1%	0%
Not important at all	0%	0%	0%	1%	0%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.



# Key ambition drivers: Importance of *improvement* to the organization (cont'd)

> To what extent is the following aspect important to your organization as a whole: **Improvement**

	Total (n=653)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=73)	Other services (except Public Administration) (n=54)	Construction (n=48)	Professional, Scientific and Technical Services (n=128)	Health Care and Social Assistance (n=22)*	Accommodation and Food Services (n=25)*	Wholesale Trade (n=41)	Manufacturing (n=111)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Very important	<b>71%</b>	75%	75%	66%	80%	60%	81%	80%	63%	75%	100%	86%
Somewhat important	<b>27%</b>	25%	24%	32%	17%	36%	14%	20%	37%	23%	0%	7%
Not really important	<b>2%</b>	0%	1%	3%	2%	4%	5%	0%	0%	2%	0%	6%
Not important at all	<b>0%</b>	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%

	Total (n=655)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=9)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Very important	<b>71%</b>	72%	76%	81%	86%	59%	72%	75%	100%	32%	100%
Somewhat important	<b>27%</b>	29%	24%	19%	14%	41%	28%	25%	0%	68%	0%
Not really important	<b>2%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Not important at all	<b>0%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Key ambition drivers: Importance of *growth* to the organization

> To what extent is the following aspect important to your organization as a whole: **Growth**

	Total (n=654)	Atlantic Canada (n=48)	Quebec (n=145)	Ontario (n=200)	Western Canada (n=261)
Very important	65%	72%	64%	62%	67%
Somewhat important	31%	28%	32%	32%	29%
Not really important	4%	0%	4%	5%	4%
Not important at all	1%	0%	0%	1%	1%

	Total (n=654)	Fewer than 5 employees (n=224)	5 to 19 employees (n=261)	20 to 49 employees (n=93)	50 or more employees (n=76)
Very important	65%	66%	64%	62%	63%
Somewhat important	31%	30%	32%	32%	34%
Not really important	4%	4%	4%	7%	3%
Not important at all	1%	1%	0%	0%	0%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base.



# Key ambition drivers: Importance of *growth* to the organization (cont'd)

> To what extent is the following aspect important to your organization as a whole: **Growth**

	Total (n=654)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=73)	Other services (except Public Administration) (n=54)	Construction (n=47)	Professional, Scientific and Technical Services (n=127)	Health Care and Social Assistance (n=23)*	Accommoda- tion and Food Services (n=25)*	Wholesale Trade (n=41)	Manufacturing (n=112)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Very important	<b>65%</b>	91%	72%	67%	63%	61%	89%	74%	51%	59%	39%	72%
Somewhat important	<b>31%</b>	9%	26%	30%	27%	33%	11%	26%	47%	37%	61%	27%
Not really important	<b>4%</b>	0%	2%	3%	10%	5%	0%	0%	0%	5%	0%	2%
Not important at all	<b>1%</b>	0%	0%	0%	0%	1%	0%	0%	2%	0%	0%	0%

	Total (n=654)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Very important	<b>65%</b>	77%	68%	57%	91%	40%	59%	69%	11%	68%	100%
Somewhat important	<b>31%</b>	23%	9%	37%	9%	49%	42%	0%	70%	32%	0%
Not really important	<b>4%</b>	0%	11%	6%	0%	11%	0%	31%	20%	0%	0%
Not important at all	<b>1%</b>	0%	12%	0%	0%	0%	0%	0%	0%	0%	0%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.





# Key ambition drivers: Importance of *innovation* to the organization

> To what extent is the following aspect important to your organization as a whole: **Innovation**

	Total (n=654)	Atlantic Canada (n=48)	Quebec (n=145)	Ontario (n=199)	Western Canada (n=262)
Very important	57%	63%	63%	50%	60%
Somewhat important	35%	32%	28%	42%	33%
Not really important	6%	5%	7%	7%	6%
Not important at all	1%	0%	2%	1%	1%

	Total (n=654)	Fewer than 5 employees (n=224)	5 to 19 employees (n=261)	20 to 49 employees (n=93)	50 or more employees (n=76)
Very important	57%	56%	57%	61%	68%
Somewhat important	35%	37%	34%	34%	29%
Not really important	6%	6%	8%	5%	4%
Not important at all	1%	1%	1%	0%	0%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base.



# Key ambition drivers: Importance of *innovation* to the organization (cont'd)

> To what extent is the following aspect important to your organization as a whole: **Innovation**

	Total (n=654)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=73)	Other services (except Public Administration) (n=54)	Construction (n=47)	Professional, Scientific and Technical Services (n=128)	Health Care and Social Assistance (n=22)*	Accommodatio n and Food Services (n=25)*	Wholesale Trade (n=41)	Manufacturing (n=112)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Very important	<b>57%</b>	69%	55%	67%	46%	60%	71%	47%	57%	62%	41%	33%
Somewhat important	<b>35%</b>	31%	38%	18%	48%	35%	29%	45%	36%	31%	33%	50%
Not really important	<b>6%</b>	0%	7%	15%	7%	4%	0%	8%	4%	6%	25%	14%
Not important at all	<b>1%</b>	0%	0%	0%	0%	1%	0%	0%	4%	1%	0%	4%

	Total (n=654)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Very important	<b>57%</b>	72%	48%	34%	52%	49%	70%	69%	26%	32%	100%
Somewhat important	<b>35%</b>	20%	29%	66%	44%	37%	30%	31%	74%	68%	0%
Not really important	<b>6%</b>	0%	11%	0%	5%	15%	0%	0%	0%	0%	0%
Not important at all	<b>1%</b>	8%	12%	0%	0%	0%	0%	0%	0%	0%	0%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. \* Results presented in *italic* indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Key ambition drivers: Presence of *improvement* within the organization's operational mindset

> To what extent is the following aspect currently part of your company's daily operational mindset: **Improvement**

	Total (n=653)	Atlantic Canada (n=48)	Quebec (n=144)	Ontario (n=198)	Western Canada (n=263)
Very much present	53%	61%	46%	49%	58%
Somewhat present	41%	30%	46%	44%	38%
Not really present	6%	8%	7%	6%	4%
Not at all present	1%	0%	1%	2%	0%

	Total (n=653)	Fewer than 5 employees (n=223)	5 to 19 employees (n=260)	20 to 49 employees (n=94)	50 or more employees (n=76)
Very much present	53%	50%	52%	64%	69%
Somewhat present	41%	43%	41%	31%	29%
Not really present	6%	6%	6%	5%	1%
Not at all present	1%	1%	1%	0%	1%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. Numbers in **red** and **green** highlight statistically significant differences between sub-groups.



# Key ambition drivers: Presence of *improvement* within the organization's operational mindset (cont'd)

> To what extent is the following aspect currently part of your company's daily operational mindset: **Improvement**

	Total (n=653)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=73)	Other services (except Public Administration) (n=54)	Construction (n=48)	Professional, Scientific and Technical Services (n=127)	Health Care and Social Assistance (n=22)*	Accommodatio n and Food Services (n=25)*	Wholesale Trade (n=41)	Manufacturing (n=111)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Very much present	<b>53%</b>	45%	57%	57%	64%	39%	55%	48%	50%	53%	46%	63%
Somewhat present	<b>41%</b>	42%	41%	41%	30%	52%	40%	36%	46%	41%	54%	34%
Not really present	<b>6%</b>	7%	1%	3%	6%	7%	5%	16%	4%	5%	0%	3%
Not at all present	<b>1%</b>	6%	1%	0%	1%	1%	0%	0%	0%	1%	0%	0%

	Total (n=653)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Very much present	<b>53%</b>	48%	70%	47%	71%	36%	80%	56%	37%	32%	100%
Somewhat present	<b>41%</b>	20%	18%	26%	29%	64%	16%	44%	44%	68%	0%
Not really present	<b>6%</b>	32%	12%	27%	0%	0%	4%	0%	20%	0%	0%
Not at all present	<b>1%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Key ambition drivers: Presence of *growth* within the organization's operational mindset

> To what extent is the following aspect currently part of your company's daily operational mindset: **Growth**

	Total (n=655)	Atlantic Canada (n=48)	Quebec (n=144)	Ontario (n=200)	Western Canada (n=263)
Very much present	51%	53%	49%	50%	53%
Somewhat present	37%	32%	37%	41%	35%
Not really present	10%	15%	13%	6%	10%
Not at all present	2%	0%	1%	2%	2%

	Total (n=655)	Fewer than 5 employees (n=224)	5 to 19 employees (n=261)	20 to 49 employees (n=94)	50 or more employees (n=76)
Very much present	51%	53%	49%	46%	60%
Somewhat present	37%	36%	39%	44%	36%
Not really present	10%	10%	9%	10%	3%
Not at all present	2%	2%	3%	0%	1%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base.



# Key ambition drivers: Presence of *growth* within the organization's operational mindset (cont'd)

> To what extent is the following aspect currently part of your company's daily operational mindset: **Growth**

	Total (n=655)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=73)	Other services (except Public Administration) (n=54)	Construction (n=48)	Professional, Scientific and Technical Services (n=127)	Health Care and Social Assistance (n=23)*	Accommodatio n and Food Services (n=25)*	Wholesale Trade (n=41)	Manufacturing (n=112)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Very much present	<b>51%</b>	35%	57%	55%	63%	46%	47%	40%	55%	45%	14%	64%
Somewhat present	<b>37%</b>	65%	34%	31%	19%	38%	34%	56%	37%	47%	73%	29%
Not really present	<b>10%</b>	0%	6%	14%	14%	10%	18%	4%	8%	8%	13%	7%
Not at all present	<b>2%</b>	0%	3%	0%	5%	5%	0%	0%	0%	1%	0%	0%

	Total (n=655)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Very much present	<b>51%</b>	38%	45%	28%	74%	47%	74%	69%	54%	68%	100%
Somewhat present	<b>37%</b>	53%	41%	72%	10%	48%	19%	0%	11%	32%	0%
Not really present	<b>10%</b>	9%	14%	0%	16%	6%	7%	31%	35%	0%	0%
Not at all present	<b>2%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Key ambition drivers: Presence of *innovation* within the organization's operational mindset

> To what extent is the following aspect currently part of your company's daily operational mindset: **Innovation**

	Total (n=654)	Atlantic Canada (n=48)	Quebec (n=144)	Ontario (n=199)	Western Canada (n=263)
Very much present	36%	43%	39%	34%	35%
Somewhat present	46%	44%	46%	43%	49%
Not really present	17%	13%	14%	21%	15%
Not at all present	2%	0%	2%	3%	1%

	Total (n=654)	Fewer than 5 employees (n=223)	5 to 19 employees (n=261)	20 to 49 employees (n=94)	50 or more employees (n=76)
Very much present	36%	36%	35%	35%	47%
Somewhat present	46%	44%	48%	55%	40%
Not really present	17%	19%	15%	10%	13%
Not at all present	2%	1%	3%	0%	0%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base.



# Key ambition drivers: Presence of *innovation* within the organization's operational mindset (cont'd)

> To what extent is the following aspect currently part of your company's daily operational mindset: **Innovation**

	Total (n=654)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=73)	Other services (except Public Administration) (n=54)	Construction (n=48)	Professional, Scientific and Technical Services (n=127)	Health Care and Social Assistance (n=22)*	Accommodatio n and Food Services (n=25)*	Wholesale Trade (n=41)	Manufacturing (n=112)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Very much present	<b>36%</b>	29%	41%	31%	33%	33%	40%	19%	31%	49%	7%	30%
Somewhat present	<b>46%</b>	56%	48%	44%	44%	46%	39%	60%	49%	40%	67%	44%
Not really present	<b>17%</b>	15%	10%	25%	23%	19%	22%	17%	20%	8%	25%	27%
Not at all present	<b>2%</b>	0%	2%	0%	0%	1%	0%	4%	0%	3%	0%	0%

	Total (n=654)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Very much present	<b>36%</b>	24%	34%	24%	34%	16%	64%	26%	11%	32%	100%
Somewhat present	<b>46%</b>	63%	34%	47%	51%	69%	36%	50%	89%	0%	0%
Not really present	<b>17%</b>	5%	20%	29%	14%	15%	0%	25%	0%	68%	0%
Not at all present	<b>2%</b>	8%	12%	0%	0%	0%	0%	0%	0%	0%	0%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.





# Innovation elements present in the company

> Among the following elements, which ones are currently in place in your organization? Multiple answers allowed.

	Total (n=647)	Atlantic Canada (n=47)	Quebec (n=142)	Ontario (n=199)	Western Canada (n=259)
Planning of innovative projects	45%	32%	48%	43%	47%
Pilot testing of innovative ideas/projects	43%	44%	44%	46%	39%
Tracking of ongoing innovative projects	40%	31%	48%	37%	39%
Process of identification of pertinent ideas/projects	36%	37%	38%	36%	33%
Commercialization of innovative ideas/projects	26%	21%	30%	28%	23%
Budget for innovative projects	23%	12%	30%	22%	24%
Project managers assigned to innovative projects	19%	24%	19%	18%	19%
Tracking of return on investments related to innovative projects	18%	11%	9%	21%	22%
Other	2%	2%	2%	1%	1%
We have not implemented any of the above-mentioned operational elements	22%	30%	19%	23%	22%
Don't know	2%	0%	1%	1%	3%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.



# Innovation elements present in the company (cont'd)

> Among the following elements, which ones are currently in place in your organization? Multiple answers allowed.

	Total (n=647)	Fewer than 5 employees (n=221)	5 to 19 employees (n=258)	20 to 49 employees (n=93)	50 or more employees (n=75)
Planning of innovative projects	45%	41%	48%	52%	56%
Pilot testing of innovative ideas/projects	43%	41%	43%	49%	58%
Tracking of ongoing innovative projects	40%	36%	40%	49%	63%
Process of identification of pertinent ideas/projects	36%	33%	36%	45%	49%
Commercialization of innovative ideas/projects	26%	25%	24%	38%	35%
Budget for innovative projects	23%	18%	25%	43%	41%
Project managers assigned to innovative projects	19%	13%	21%	37%	46%
Tracking of return on investments related to innovative projects	18%	17%	20%	16%	30%
Other	2%	1%	2%	0%	2%
We have not implemented any of the above-mentioned operational elements	22%	27%	19%	14%	6%
Don't know	2%	3%	1%	0%	1%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.



# Innovation elements present in the company (cont'd)

> Among the following elements, which ones are currently in place in your organization? Multiple answers allowed.

	Total (n=647)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=70)	Other services (except Public Administration) (n=54)	Construction (n=47)	Professional, Scientific and Technical Services (n=126)	Health Care and Social Assistance (n=23)*	Accommodati on and Food Services (n=24)*	Wholesale Trade (n=40)	Manufacturing (n=112)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Planning of innovative projects	45%	46%	32%	40%	46%	48%	46%	46%	48%	54%	35%	34%
Pilot testing of innovative ideas/projects	43%	46%	36%	47%	40%	38%	44%	39%	40%	48%	49%	24%
Tracking of ongoing innovative projects	40%	27%	31%	47%	32%	44%	39%	28%	36%	50%	42%	21%
Process of identification of pertinent ideas/projects	36%	34%	28%	33%	22%	32%	35%	26%	21%	49%	20%	37%
Commercialization of innovative ideas/projects	26%	33%	13%	26%	23%	24%	13%	14%	21%	41%	19%	9%
Budget for innovative projects	23%	14%	15%	18%	22%	24%	13%	22%	34%	26%	31%	16%
Project managers assigned to innovative projects	19%	6%	7%	22%	26%	22%	24%	15%	13%	22%	25%	12%
Tracking of return on investments related to innovative projects	18%	7%	20%	22%	20%	15%	13%	8%	32%	20%	28%	7%
Other	2%	9%	1%	3%	0%	0%	0%	0%	0%	2%	28%	0%
We have not implemented any of the above-mentioned operational elements	22%	29%	25%	23%	29%	23%	23%	30%	16%	19%	23%	27%
Don't know	2%	2%	4%	5%	2%	2%	0%	0%	0%	0%	0%	0%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. \*Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Innovation elements present in the company (cont'd)

> Among the following elements, which ones are currently in place in your organization? Multiple answers allowed.

	Total (n=647)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=13)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Planning of innovative projects	45%	74%	17%	22%	46%	58%	70%	56%	11%	100%	0%
Pilot testing of innovative ideas/projects	43%	60%	39%	32%	73%	49%	62%	69%	70%	100%	33%
Tracking of ongoing innovative projects	40%	49%	50%	18%	55%	27%	61%	32%	11%	0%	0%
Process of identification of pertinent ideas/projects	36%	39%	15%	45%	37%	50%	82%	56%	11%	100%	0%
Commercialization of innovative ideas/projects	26%	50%	12%	18%	52%	37%	61%	44%	11%	0%	0%
Budget for innovative projects	23%	32%	27%	14%	56%	25%	46%	32%	0%	32%	0%
Project managers assigned to innovative projects	19%	10%	39%	21%	11%	26%	4%	25%	31%	0%	67%
Tracking of return on investments related to innovative projects	18%	4%	25%	11%	38%	39%	23%	26%	70%	0%	0%
Other	2%	27%	22%	6%	33%	0%	29%	13%	54%	0%	0%
We have not implemented any of the above-mentioned operational elements	22%	0%	0%	0%	0%	0%	6%	13%	0%	0%	0%
Don't know	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Incentives to innovate

> What are your company's main incentives to innovate, that is to do things differently? Multiple answers allowed.

	Total (n=652)	Atlantic Canada (n=48)	Quebec (n=144)	Ontario (n=200)	Western Canada (n=260)
We have a strong desire to differentiate our company in the marketplace	70%	61%	71%	67%	74%
Innovation helps to grow our business	69%	55%	72%	68%	72%
Innovation generates new business opportunities	68%	65%	72%	65%	68%
We have a strong desire to improve	65%	61%	67%	57%	71%
Innovation contributes to the bottom line	58%	48%	69%	55%	55%
Innovation enables us to be more productive	57%	42%	63%	56%	57%
Innovation is necessary for our company to survive	56%	45%	69%	58%	48%
We constantly get new ideas; innovation is part of our entrepreneurial nature	51%	43%	62%	46%	51%
Other	3%	5%	2%	5%	1%
Don't know	2%	5%	0%	2%	2%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.



## Incentives to innovate (cont'd)

> What are your company's main incentives to innovate, that is to do things differently? Multiple answers allowed.

	Total (n=652)	Fewer than 5 employees (n=223)	5 to 19 employees (n=259)	20 to 49 employees (n=94)	50 or more employees (n=76)
We have a strong desire to differentiate our company in the marketplace	70%	70%	69%	72%	74%
Innovation helps to grow our business	69%	69%	70%	71%	70%
Innovation generates new business opportunities	68%	66%	68%	73%	71%
We have a strong desire to improve	65%	65%	62%	69%	72%
Innovation contributes to the bottom line	58%	56%	56%	66%	69%
Innovation enables us to be more productive	57%	55%	56%	65%	70%
Innovation is necessary for our company to survive	56%	58%	51%	60%	65%
We constantly get new ideas; innovation is part of our entrepreneurial nature	51%	54%	46%	49%	57%
Other	3%	3%	3%	3%	2%
I don't know	2%	1%	3%	0%	1%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base.



# Incentives to innovate (cont'd)

> What are your company's main incentives to innovate, that is to do things differently? Multiple answers allowed.

	Total (n=652)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=72)	Other services (except Public Administration) (n=53)	Construction (n=48)	Professional, Scientific and Technical Services (n=128)	Health Care and Social Assistance (n=22)*	Accommodati on and Food Services (n=25)*	Wholesale Trade (n=40)	Manufacturing (n=112)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
We have a strong desire to differentiate our company in the marketplace	<b>70%</b>	68%	68%	70%	75%	70%	72%	65%	67%	67%	72%	70%
Innovation helps to grow our business	<b>69%</b>	69%	71%	66%	67%	71%	57%	72%	68%	71%	85%	85%
Innovation generates new business opportunities	<b>68%</b>	67%	67%	71%	58%	69%	54%	67%	67%	70%	65%	62%
We have a strong desire to improve	<b>65%</b>	44%	74%	75%	70%	63%	47%	53%	60%	58%	55%	64%
Innovation contributes to the bottom line	<b>58%</b>	55%	55%	48%	60%	64%	39%	61%	61%	67%	55%	60%
Innovation enables us to be more productive	<b>57%</b>	33%	45%	68%	65%	52%	37%	45%	63%	64%	78%	77%
Innovation is necessary for our company to survive	<b>56%</b>	54%	48%	54%	49%	57%	39%	56%	48%	68%	66%	58%
We constantly get new ideas; innovation is part of our entrepreneurial nature	<b>51%</b>	33%	46%	43%	48%	56%	30%	32%	53%	58%	53%	37%
Other	<b>3%</b>	6%	0%	4%	2%	2%	0%	3%	0%	5%	15%	0%
Don't know	<b>2%</b>	5%	0%	4%	1%	2%	0%	4%	4%	4%	0%	0%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Incentives to innovate (cont'd)

> What are your company's main incentives to innovate, that is to do things differently? Multiple answers allowed.

	Total (n=652)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
We have a strong desire to differentiate our company in the marketplace	<b>70%</b>	81%	79%	63%	73%	73%	87%	69%	35%	68%	33%
Innovation helps to grow our business	<b>69%</b>	42%	50%	53%	73%	67%	96%	50%	26%	68%	100%
Innovation generates new business opportunities	<b>68%</b>	54%	71%	75%	60%	85%	91%	50%	56%	32%	33%
We have a strong desire to improve	<b>65%</b>	77%	60%	35%	86%	74%	73%	56%	70%	100%	100%
Innovation contributes to the bottom line	<b>58%</b>	74%	39%	47%	33%	55%	69%	26%	31%	0%	33%
Innovation enables us to be more productive	<b>57%</b>	49%	60%	47%	63%	56%	77%	26%	26%	100%	100%
Innovation is necessary for our company to survive	<b>56%</b>	63%	44%	55%	27%	70%	95%	26%	31%	68%	100%
We constantly get new ideas; innovation is part of our entrepreneurial nature	<b>51%</b>	57%	46%	54%	59%	68%	80%	44%	11%	100%	67%
Other	<b>3%</b>	0%	0%	6%	0%	0%	0%	50%	0%	0%	0%
Don't know	<b>2%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.





INDIVIDUAL

# Employee diversity

> To what extent is the employee population in your company diverse in terms of experience (work and life), education, cultural background, language, and personality?

	Total (n=625)	Atlantic Canada (n=45)	Quebec (n=141)	Ontario (n=191)	Western Canada (n=248)
Very diverse	27%	30%	31%	22%	29%
Somewhat diverse	48%	36%	51%	46%	50%
Not very diverse	22%	29%	18%	28%	17%
Not diverse at all	4%	6%	1%	4%	5%

	Total (n=625)	Fewer than 5 employees (n=194)	5 to 19 employees (n=261)	20 to 49 employees (n=94)	50 or more employees (n=76)
Very diverse	27%	22%	29%	40%	42%
Somewhat diverse	48%	48%	49%	41%	46%
Not very diverse	22%	26%	19%	18%	12%
Not diverse at all	4%	5%	3%	0%	0%

Base: Respondents who have employees in their company. Those who answered "I prefer not to answer" were excluded from the calculation base. Numbers in **red** and **green** highlight statistically significant differences between sub-groups.



## Employee diversity (cont'd)

> To what extent is the employee population in your company diverse in terms of experience (work and life), education, cultural background, language, and personality?

	Total (n=625)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=67)	Other services (except Public Administration) (n=51)	Construction (n=47)	Professional, Scientific and Technical Services (n=122)	Health Care and Social Assistance (n=22)*	Accommodatio n and Food Services (n=24)*	Wholesale Trade (n=39)	Manufacturing (n=109)	Management and Remediation Services (n=7)*	Transportation and Warehousing (n=24)*
Very diverse	<b>27%</b>	23%	19%	18%	19%	34%	45%	26%	30%	31%	53%	31%
Somewhat diverse	<b>48%</b>	58%	50%	44%	54%	42%	33%	51%	45%	49%	30%	52%
Not very diverse	<b>22%</b>	14%	24%	31%	27%	23%	22%	14%	20%	19%	17%	17%
Not diverse at all	<b>4%</b>	5%	8%	7%	0%	2%	0%	10%	6%	1%	0%	0%

	Total (n=625)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=7)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=13)*	Management of Companies and Enterprises (n=9)*	Information and Cultural Industries (n=22)*	Educational Services (n=5)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=1)*	Utilities (n=2)*
Very diverse	<b>27%</b>	5%	0%	14%	38%	27%	29%	23%	44%	0%	0%
Somewhat diverse	<b>48%</b>	53%	86%	51%	29%	46%	50%	46%	56%	100%	100%
Not very diverse	<b>22%</b>	32%	14%	21%	22%	28%	21%	31%	0%	0%	0%
Not diverse at all	<b>4%</b>	9%	0%	15%	11%	0%	0%	0%	0%	0%	0%

Base: Respondents who have employees in their company. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



INDIVIDUAL

# Investment in employee training

> Approximately, how much does your company invest annually in employee training?

	Total (n=427)	Atlantic Canada (n=26)*	Quebec (n=107)	Ontario (n=122)	Western Canada (n=172)
\$1,000 or less	19%	6%	22%	18%	20%
Between \$1,001 and \$2,500	15%	17%	12%	19%	13%
Between \$2,501 and \$5,000	26%	41%	22%	27%	24%
Between \$5,001 and \$10,000	18%	28%	16%	17%	19%
Between \$10,001 and \$25,000	10%	4%	14%	8%	11%
Between \$25,001 and \$50,000	7%	3%	11%	4%	8%
\$50,001 or more	5%	2%	2%	7%	4%
Average investment in employee training (\$)	18,922	9,533	16,721	26,424	15,055
Median investment in employee training (\$)	5,000	5,000	5,000	5,000	5,000

	Total (n=427)	Fewer than 5 employees (n=111)	5 to 19 employees (n=180)	20 to 49 employees (n=84)	50 or more employees (n=52)
\$1,000 or less	19%	30%	15%	3%	0%
Between \$1,001 and \$2,500	15%	22%	12%	4%	2%
Between \$2,501 and \$5,000	26%	28%	29%	15%	7%
Between \$5,001 and \$10,000	18%	12%	23%	27%	12%
Between \$10,001 and \$25,000	10%	3%	14%	20%	25%
Between \$25,001 and \$50,000	7%	4%	6%	21%	21%
\$50,001 or more	5%	2%	2%	11%	33%
Average investment in employee training (\$)	18,922	7,043	13,343	40,171	116,585
Median investment in employee training (\$)	5,000	2,000	5,000	15,000	32,000

Base: Respondents who have employees in their company. Completion for this question was not mandatory. Numbers in red and green highlight statistically significant differences between sub-groups.



INDIVIDUAL

## Investment in employee training (cont'd)

> Approximately, how much does your company invest annually in employee training?

	Total (n=427)	Retail – 20 or more employees (n=19)*	Retail – less than 20 employees (n=36)	Other services (except Public Administration) (n=32)	Construction (n=35)	Professional, Scientific and Technical Services (n=95)	Health Care and Social Assistance (n=14)*	Accommodati on and Food Services (n=18)*	Wholesale Trade (n=26)	Manufacturing (n=71)	Management and Remediation Services (n=2)*	Transportation and Warehousing (n=20)*
\$1,000 or less	<b>19%</b>	17%	31%	28%	11%	7%	0%	42%	14%	24%	0%	9%
Between \$1,001 and \$2,500	<b>15%</b>	15%	31%	22%	13%	16%	14%	0%	7%	7%	0%	27%
Between \$2,501 and \$5,000	<b>26%</b>	13%	28%	19%	11%	31%	18%	33%	42%	26%	49%	18%
Between \$5,001 and \$10,000	<b>18%</b>	13%	7%	12%	33%	25%	21%	13%	19%	14%	51%	27%
Between \$10,001 and \$25,000	<b>10%</b>	17%	0%	7%	14%	11%	18%	7%	14%	15%	0%	8%
Between \$25,001 and \$50,000	<b>7%</b>	23%	2%	11%	8%	8%	12%	0%	3%	6%	0%	11%
\$50,001 or more	<b>5%</b>	3%	2%	2%	10%	3%	17%	5%	1%	8%	0%	0%
Average investment in employee training (\$)	<b>18,922</b>	20,156	14,935	11,866	28,669	17,975	29,509	19,939	10,770	16,068	7,541	10,805
Median investment in employee training (\$)	<b>5,000</b>	7,000	2,000	3,000	10,000	5,000	10,000	3,000	5,000	5,000	10,000	5,000

Base: Respondents who have employees in their company. Completion for this question was not mandatory. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



INDIVIDUAL

# Investment in employee training (cont'd)

> Approximately, how much does your company invest annually in employee training?

	Total (n=427)	Agriculture, Forestry, Fishing and Hunting (n=4)*	Real Estate and Rental and Leasing (n=4)*	Finance and Insurance (n=12)*	Arts, Entertainment and Recreation (n=9)*	Management of Companies and Enterprises (n=7)*	Information and Cultural Industries (n=14)*	Educational Services (n=3)*	Mining, Quarrying and Oil and Gas Extraction (n=4)*	Public Administration (n=1)*	Utilities (n=1)*
\$1,000 or less	19%	61%	100%	11%	29%	30%	35%	0%	0%	0%	0%
Between \$1,001 and \$2,500	15%	22%	0%	15%	10%	0%	17%	20%	0%	0%	0%
Between \$2,501 and \$5,000	26%	17%	0%	21%	37%	18%	18%	80%	0%	0%	0%
Between \$5,001 and \$10,000	18%	0%	0%	21%	0%	18%	16%	0%	0%	100%	100%
Between \$10,001 and \$25,000	10%	0%	0%	15%	19%	16%	4%	0%	0%	0%	0%
Between \$25,001 and \$50,000	7%	0%	0%	14%	6%	18%	6%	0%	21%	0%	0%
\$50,001 or more	5%	0%	0%	3%	0%	0%	3%	0%	79%	0%	0%
Average investment in employee training (\$)	<b>18,922</b>	1,674	850	16,066	9,308	14,742	74,751*	4,390	83,282*	10,000	10,000
Median investment in employee training (\$)	<b>5,000</b>	1,000	1,000	7,500	3,000	10,000	2,500	5,000	100,000	10,000	10,000

**Results for “Information and Cultural Industries” and “Mining, Quarrying and Oil and Gas Extraction” must be interpreted with extreme caution since the averages are pulled upwards by a relatively small number of respondents**

Base: Respondents who have employees in their company. Completion for this question was not mandatory. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



INDIVIDUAL

# Tolerance of employee mistakes

> To what extent do you agree with the following statement? **“In our organization, employees are allowed to make mistakes”**.

	Total (n=626)	Atlantic Canada (n=44)	Quebec (n=14435)	Ontario (n=190)	Western Canada (n=249)
Completely agree	44%	35%	39%	43%	49%
Somewhat agree	42%	46%	46%	42%	38%
Somewhat disagree	10%	17%	12%	10%	9%
Completely disagree	4%	2%	3%	4%	5%

	Total (n=626)	Fewer than 5 employees (n=197)	5 to 19 employees (n=259)	20 to 49 employees (n=94)	50 or more employees (n=76)
Completely agree	44%	43%	46%	37%	51%
Somewhat agree	42%	42%	39%	50%	43%
Somewhat disagree	10%	11%	11%	10%	4%
Completely disagree	4%	5%	3%	3%	3%

Base: Respondents who have employees in their company. Those who answered “I prefer not to answer” were excluded from the calculation base.



## INDIVIDUAL

# Tolerance of employee mistakes (cont'd)

> To what extent do you agree with the following statement? **“In our organization, employees are allowed to make mistakes”**.

	Total (n=626)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=67)	Other services (except Public Administration) (n=52)	Construction (n=47)	Professional, Scientific and Technical Services (n=123)	Health Care and Social Assistance (n=22)*	Accommodatio n and Food Services (n=23)*	Wholesale Trade (n=39)	Manufacturing (n=108)	Management and Remediation Services (n=7)*	Transportation and Warehousing (n=24)*
Completely agree	<b>44%</b>	48%	43%	37%	43%	42%	46%	25%	51%	48%	68%	13%
Somewhat agree	<b>42%</b>	27%	42%	40%	41%	40%	54%	63%	31%	43%	32%	68%
Somewhat disagree	<b>10%</b>	15%	11%	14%	11%	14%	0%	7%	16%	8%	0%	13%
Completely disagree	<b>4%</b>	11%	4%	9%	6%	4%	0%	4%	2%	2%	0%	7%

	Total (n=626)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=7)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=13)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=5)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=1)*	Utilities (n=2)*
Completely agree	<b>44%</b>	43%	7%	48%	47%	50%	77%	100%	59%	0%	0%
Somewhat agree	<b>42%</b>	48%	66%	52%	38%	50%	23%	0%	31%	0%	33%
Somewhat disagree	<b>10%</b>	9%	14%	0%	0%	0%	0%	0%	11%	100%	67%
Completely disagree	<b>4%</b>	0%	14%	0%	14%	0%	0%	0%	0%	0%	0%

Base: Respondents who have employees in their company. Those who answered “I prefer not to answer” were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Employee knowledge sharing

> Overall, how well do employees in your organization share information with one another?

	Total (n=625)	Atlantic Canada (n=44)	Quebec (n=142)	Ontario (n=191)	Western Canada (n=248)
Very well	45%	54%	36%	46%	48%
Somewhat well	48%	40%	54%	47%	46%
Not very well	7%	6%	10%	6%	7%
Not well at all	0%	0%	0%	0%	0%
I don't know	0%	0%	0%	0%	0%

	Total (n=625)	Fewer than 5 employees (n=194)	5 to 19 employees (n=261)	20 to 49 employees (n=94)	50 or more employees (n=76)
Very well	45%	56%	36%	23%	32%
Somewhat well	48%	39%	53%	69%	58%
Not very well	7%	5%	9%	7%	11%
Not well at all	0%	0%	1%	0%	0%
I don't know	0%	0%	0%	0%	0%

Base: Respondents who have employees in their company. Those who answered "I prefer not to answer" were excluded from the calculation base. Numbers in **red** and **green** highlight statistically significant differences between sub-groups.





# Employee knowledge sharing (cont'd)

> Overall, how well do employees in your organization share information with one another?

	Total (n=625)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=66)	Other services (except Public Administration) (n=52)	Construction (n=47)	Professional, Scientific and Technical Services (n=122)	Health Care and Social Assistance (n=22)*	Accommodation and Food Services (n=24)*	Wholesale Trade (n=39)	Manufacturing (n=109)	Management and Remediation Services (n=7)*	Transportation and Warehousing (n=24)*
Very well	<b>45%</b>	14%	46%	53%	43%	47%	36%	30%	50%	38%	57%	47%
Somewhat well	<b>48%</b>	71%	43%	42%	40%	49%	62%	61%	45%	50%	34%	49%
Not very well	<b>7%</b>	15%	10%	5%	17%	4%	2%	9%	6%	10%	9%	4%
Not well at all	<b>0%</b>	0%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%
I don't know	<b>0%</b>	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%

	Total (n=625)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=7)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=12)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=5)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=1)*	Utilities (n=2)*
Very well	<b>45%</b>	24%	66%	40%	51%	31%	72%	70%	0%	0%	67%
Somewhat well	<b>48%</b>	72%	34%	49%	49%	69%	28%	0%	89%	100%	33%
Not very well	<b>7%</b>	4%	0%	11%	0%	0%	0%	31%	11%	0%	0%
Not well at all	<b>0%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't know	<b>0%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Base: Respondents who have employees in their company. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



INDIVIDUAL

# Employee collaboration

> Overall, how well would you say teams in your company work well together and collaborate?

	Total (n=625)	Atlantic Canada (n=44)	Quebec (n=142)	Ontario (n=191)	Western Canada (n=248)
Very well	47%	59%	40%	49%	49%
Somewhat well	47%	38%	55%	46%	45%
Not very well	5%	2%	5%	5%	5%
Not well at all	1%	2%	1%	0%	0%
I don't know	1%	0%	0%	0%	1%

	Total (n=625)	Fewer than 5 employees (n=194)	5 to 19 employees (n=261)	20 to 49 employees (n=94)	50 or more employees (n=76)
Very well	47%	55%	42%	31%	35%
Somewhat well	47%	41%	51%	61%	54%
Not very well	5%	3%	5%	9%	10%
Not well at all	1%	0%	2%	0%	0%
I don't know	1%	1%	0%	0%	0%

Base: Respondents who have employees in their company. Those who answered "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.



## Employee collaboration (cont'd)

> Overall, how well would you say teams in your company work well together and collaborate?

	Total (n=625)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=66)	Other services (except Public Administration) (n=52)	Construction (n=47)	Professional, Scientific and Technical Services (n=121)	Health Care and Social Assistance (n=22)*	Accommodatio n and Food Services (n=24)*	Wholesale Trade (n=39)	Manufacturing (n=109)	Management and Remediation Services (n=7)*	Transportation and Warehousing (n=24)*
Very well	<b>47%</b>	21%	41%	55%	44%	49%	50%	47%	45%	49%	59%	36%
Somewhat well	<b>47%</b>	70%	50%	43%	44%	48%	40%	53%	53%	41%	41%	51%
Not very well	<b>5%</b>	3%	6%	2%	10%	4%	3%	0%	2%	9%	0%	13%
Not well at all	<b>1%</b>	5%	1%	0%	2%	0%	0%	0%	0%	1%	0%	0%
I don't know	<b>1%</b>	0%	2%	0%	0%	0%	7%	0%	0%	0%	0%	0%

	Total (n=625)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=7)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=13)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=5)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=1)*	Utilities (n=2)*
Very well	<b>47%</b>	11%	52%	28%	68%	42%	76%	100%	0%	0%	67%
Somewhat well	<b>47%</b>	89%	34%	72%	32%	58%	25%	0%	100%	100%	33%
Not very well	<b>5%</b>	0%	14%	0%	0%	0%	0%	0%	0%	0%	0%
Not well at all	<b>1%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't know	<b>1%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Base: Respondents who have employees in their company. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Knowledge management

> Does your company culture encourage employees to collect and share knowledge, experience or best practices on an ongoing basis? This culture may be communicated through the company's vision, mission statement, and other formal documents or informal communications.

	Total (n=625)	Atlantic Canada (n=44)	Quebec (n=143)	Ontario (n=191)	Western Canada (n=247)
Absolutely	64%	68%	71%	58%	64%
Somewhat	27%	28%	22%	28%	29%
Not really	7%	4%	7%	11%	5%
Not at all	2%	0%	1%	3%	2%

	Total (n=625)	Fewer than 5 employees (n=197)	5 to 19 employees (n=258)	20 to 49 employees (n=94)	50 or more employees (n=76)
Absolutely	64%	70%	57%	63%	56%
Somewhat	27%	21%	32%	29%	43%
Not really	7%	7%	9%	8%	1%
Not at all	2%	2%	2%	0%	0%

Base: Respondents who have employees in their company. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.



## Knowledge management (cont'd)

> Does your company culture encourage employees to collect and share knowledge, experience or best practices on an ongoing basis? This culture may be communicated through the company's vision, mission statement, and other formal documents or informal communications.

	Total (n=625)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=64)	Other services (except Public Administration) (n=52)	Construction (n=47)	Professional, Scientific and Technical Services (n=123)	Health Care and Social Assistance (n=22)*	Accommodation and Food Services (n=24)*	Wholesale Trade (n=39)	Manufacturing (n=109)	Management and Remediation Services (n=7)*	Transportation and Warehousing (n=24)*
Absolutely	<b>64%</b>	50%	60%	70%	59%	74%	70%	55%	58%	59%	74%	63%
Somewhat	<b>27%</b>	26%	36%	24%	31%	19%	25%	31%	33%	25%	26%	22%
Not really	<b>7%</b>	25%	4%	2%	6%	5%	5%	14%	4%	15%	0%	16%
Not at all	<b>2%</b>	0%	0%	4%	4%	3%	0%	0%	6%	1%	0%	0%

	Total (n=625)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=7)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=13)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=5)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=1)*	Utilities (n=2)*
Absolutely	<b>64%</b>	55%	25%	53%	49%	66%	75%	100%	37%	100%	100%
Somewhat	<b>27%</b>	35%	59%	29%	51%	34%	17%	0%	64%	0%	0%
Not really	<b>7%</b>	10%	16%	18%	0%	0%	8%	0%	0%	0%	0%
Not at all	<b>2%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Base: Respondents who have employees in their company. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Sources of knowledge and ideas

> What sources are used to gain knowledge and generate new ideas in your organization? Multiple answers allowed.

	Total (n=655)	Atlantic Canada (n=48)	Quebec (n=145)	Ontario (n=199)	Western Canada (n=263)
Customers	86%	81%	80%	88%	89%
Employees	81%	90%	79%	79%	82%
Suppliers	74%	68%	76%	73%	74%
Competitors	68%	57%	59%	69%	75%
Online sources	66%	62%	60%	66%	70%
Industry-specific associations	59%	44%	51%	58%	67%
Business professionals	48%	41%	51%	45%	51%
Workshops	44%	50%	36%	39%	54%
Courses	40%	38%	43%	31%	48%
Traditional media	25%	25%	27%	23%	26%
Friends and family	25%	37%	25%	18%	29%
Universities and colleges	21%	14%	19%	20%	23%
Job-specific groups or associations	21%	28%	19%	20%	22%
Government agencies	18%	23%	19%	16%	18%
Other	5%	6%	5%	4%	5%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.



## Sources of knowledge and ideas (cont'd)

> What sources are used to gain knowledge and generate new ideas in your organization? Multiple answers allowed.

	Total (n=655)	Fewer than 5 employees (n=225)	5 to 19 employees (n=260)	20 to 49 employees (n=94)	50 or more employees (n=76)
Customers	86%	86%	85%	84%	88%
Employees	81%	77%	85%	86%	98%
Suppliers	74%	72%	76%	82%	74%
Competitors	68%	70%	66%	63%	72%
Online sources	66%	73%	60%	58%	50%
Industry-specific associations	59%	60%	54%	60%	74%
Business professionals	48%	49%	44%	52%	58%
Workshops	44%	44%	42%	52%	57%
Courses	40%	35%	45%	49%	55%
Traditional media	25%	25%	23%	30%	31%
Friends and family	25%	26%	25%	16%	23%
Universities and colleges	21%	21%	19%	23%	23%
Job-specific groups or associations	21%	22%	18%	22%	33%
Government agencies	18%	17%	17%	20%	25%
Other	5%	4%	6%	4%	5%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.



# Sources of knowledge and ideas (cont'd)

> What sources are used to gain knowledge and generate new ideas in your organization? Multiple answers allowed.

	Total (n=655)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=73)	Other services (except Public Administration) (n=54)	Construction (n=48)	Professional, Scientific and Technical Services (n=128)	Health Care and Social Assistance (n=23)*	Accommodati on and Food Services (n=25)*	Wholesale Trade (n=41)	Manufacturing (n=111)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Customers	86%	89%	91%	80%	81%	79%	94%	82%	94%	86%	93%	100%
Employees	81%	69%	81%	74%	85%	81%	100%	79%	78%	78%	78%	97%
Suppliers	74%	76%	89%	81%	84%	61%	59%	66%	96%	83%	70%	67%
Competitors	68%	59%	68%	57%	69%	57%	79%	78%	84%	68%	80%	85%
Online sources	66%	58%	76%	66%	56%	70%	65%	72%	67%	53%	73%	47%
Industry-specific associations	59%	63%	57%	60%	61%	66%	61%	49%	61%	45%	31%	62%
Business professionals	48%	26%	34%	49%	46%	63%	68%	55%	32%	34%	60%	53%
Workshops	44%	60%	36%	41%	63%	57%	52%	32%	44%	27%	46%	51%
Courses	40%	46%	27%	46%	59%	47%	67%	40%	33%	21%	35%	28%
Traditional media	25%	18%	28%	28%	28%	24%	22%	30%	21%	20%	39%	32%
Friends and family	25%	21%	33%	21%	30%	20%	18%	56%	19%	16%	35%	32%
Universities and colleges	21%	0%	6%	24%	19%	30%	51%	16%	9%	18%	30%	2%
Job-specific groups or associations	21%	18%	14%	31%	28%	30%	22%	24%	13%	11%	35%	15%
Government agencies	18%	15%	8%	14%	24%	26%	34%	19%	10%	11%	7%	8%
Other	5%	3%	3%	3%	3%	6%	0%	7%	3%	5%	7%	0%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.





# Sources of knowledge and ideas (cont'd)

> What sources are used to gain knowledge and generate new ideas in your organization? Multiple answers allowed.

	Total (n=655)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Customers	86%	91%	89%	73%	83%	88%	97%	100%	80%	100%	67%
Employees	81%	81%	89%	68%	69%	85%	100%	81%	100%	32%	100%
Suppliers	74%	48%	52%	65%	68%	46%	56%	69%	35%	100%	100%
Competitors	68%	73%	84%	73%	73%	71%	84%	81%	89%	32%	100%
Online sources	66%	63%	68%	56%	73%	68%	97%	100%	20%	100%	0%
Industry-specific associations	59%	52%	44%	78%	57%	67%	68%	75%	56%	100%	0%
Business professionals	48%	50%	48%	51%	42%	78%	55%	69%	54%	100%	0%
Workshops	44%	40%	59%	48%	37%	23%	50%	56%	26%	32%	0%
Courses	40%	56%	67%	63%	24%	36%	50%	56%	26%	100%	0%
Traditional media	25%	10%	5%	16%	32%	11%	64%	32%	0%	32%	0%
Friends and family	25%	27%	32%	14%	23%	36%	46%	19%	11%	0%	33%
Universities and colleges	21%	67%	9%	24%	20%	23%	33%	44%	0%	32%	0%
Job-specific groups or associations	21%	19%	10%	22%	10%	19%	24%	56%	0%	32%	0%
Government agencies	18%	34%	0%	40%	10%	24%	23%	51%	11%	32%	33%
Other	5%	9%	11%	6%	10%	0%	6%	13%	0%	0%	0%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Structures for capturing knowledge

> Is there some kind of structure or mechanism for capturing knowledge stemming from employees, the market or the business environment?

	Total (n=619)	Atlantic Canada (n=45)	Quebec (n=142)	Ontario (n=186)	Western Canada (n=246)
We have a formal structure or mechanism	10%	6%	14%	11%	7%
We have an informal structure or mechanism	36%	24%	33%	33%	43%
We have both formal and informal structures or mechanisms	13%	9%	12%	14%	14%
We do not have such structures or mechanisms	41%	62%	42%	43%	37%

	Total (n=619)	Fewer than 5 employees (n=195)	5 to 19 employees (n=255)	20 to 49 employees (n=94)	50 or more employees (n=75)
We have a formal structure or mechanism	10%	9%	11%	11%	13%
We have an informal structure or mechanism	36%	35%	35%	34%	46%
We have both formal and informal structures or mechanisms	13%	11%	12%	20%	18%
We do not have such structures or mechanisms	41%	45%	41%	35%	23%

Base: Respondents who have employees in their company and who indicated using sources to gain knowledge and generate ideas. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. Numbers in **red** and **green** highlight statistically significant differences between sub-groups.



# Structures for capturing knowledge (cont'd)

> Is there some kind of structure or mechanism for capturing knowledge stemming from employees, the market or the business environment?

	Total (n=619)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=66)	Other services (except Public Administration) (n=52)	Construction (n=47)	Professional, Scientific and Technical Services (n=122)	Health Care and Social Assistance (n=20)*	Accommodati on and Food Services (n=24)*	Wholesale Trade (n=38)	Manufacturing (n=107)	Management and Remediation Services (n=6)*	Transportation and Warehousing (n=24)*
We have a formal structure or mechanism	<b>10%</b>	0%	6%	13%	10%	10%	14%	0%	3%	15%	40%	8%
We have an informal structure or mechanism	<b>36%</b>	15%	30%	48%	38%	39%	33%	28%	48%	35%	10%	35%
We have both formal and informal structures or mechanisms	<b>13%</b>	17%	8%	6%	9%	20%	26%	13%	11%	7%	15%	23%
We do not have such structures or mechanisms	<b>41%</b>	69%	56%	34%	43%	31%	26%	60%	39%	43%	35%	34%

	Total (n=619)	Agriculture, Forestry, Fishing and Hunting (n=9)*	Real Estate and Rental and Leasing (n=7)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=13)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=5)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=1)*	Utilities (n=2)*
We have a formal structure or mechanism	<b>10%</b>	0%	7%	2%	0%	25%	16%	62%	0%	100%	0%
We have an informal structure or mechanism	<b>36%</b>	54%	0%	50%	27%	45%	18%	8%	54%	0%	0%
We have both formal and informal structures or mechanisms	<b>13%</b>	9%	14%	12%	14%	11%	20%	0%	11%	0%	0%
We do not have such structures or mechanisms	<b>41%</b>	37%	79%	36%	59%	20%	46%	31%	35%	0%	100%

Base: Respondents who have employees in their company and who indicated using any sources for gaining knowledge and generating ideas. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Knowledge organization

> To what extent is the knowledge captured organized? “Organized” refers to how easily employees can find the desired information.

	Total (n=376)	Atlantic Canada (n=19)*	Quebec (n=86)	Ontario (n=112)	Western Canada (n=159)
Very organized	24%	32%	19%	28%	24%
Somewhat organized	57%	59%	62%	54%	57%
Not really organized	18%	10%	19%	18%	18%
Not at all organized	0%	0%	0%	0%	1%
I don't know	0%	0%	0%	0%	1%

	Total (n=376)	Fewer than 5 employees (n=108)	5 to 19 employees (n=149)	20 to 49 employees (n=61)	50 or more employees (n=58)
Very organized	24%	28%	22%	14%	23%
Somewhat organized	57%	52%	61%	70%	60%
Not really organized	18%	20%	16%	17%	15%
Not at all organized	0%	0%	1%	0%	2%
I don't know	0%	1%	0%	0%	0%

Base: Respondents who have employees in their company and who indicated having a formal or an informal structure in place to organize captured knowledge. Those who answered “I prefer not to answer” were excluded from the calculation base. \* Results presented in *italics* indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Knowledge organization (cont'd)

> To what extent is the knowledge captured organized? "Organized" refers to how easily employees can find the desired information.

	Total (n=376)	Retail – 20 or more employees (n=10)*	Retail – less than 20 employees (n=30)	Other services (except Public Administration) (n=36)	Construction (n=26)*	Professional, Scientific and Technical Services (n=88)	Health Care and Social Assistance (n=14)*	Accommodation and Food Services (n=12)*	Wholesale Trade (n=24)*	Manufacturing (n=63)	Management and Remediation Services (n=4)*	Transportation and Warehousing (n=16)*
Very organized	<b>24%</b>	9%	14%	29%	20%	24%	39%	9%	18%	33%	78%	31%
Somewhat	<b>57%</b>	69%	66%	43%	52%	53%	50%	78%	64%	51%	22%	54%
Not really	<b>18%</b>	22%	20%	26%	28%	23%	0%	12%	18%	16%	0%	15%
Not at all	<b>0%</b>	0%	0%	2%	0%	0%	0%	0%	0%	1%	0%	0%
I don't know	<b>0%</b>	0%	0%	0%	0%	0%	12%	0%	0%	0%	0%	0%

	Total (n=376)	Agriculture, Forestry, Fishing and Hunting (n=6)*	Real Estate and Rental and Leasing (n=2)*	Finance and Insurance (n=10)*	Arts, Entertainment and Recreation (n=7)*	Management of Companies and Enterprises (n=8)*	Information and Cultural Industries (n=12)*	Educational Services (n=4)*	Mining, Quarrying and Oil and Gas Extraction (n=3)*	Public Administration (n=1)*	Utilities (n=0)*
Very organized	<b>24%</b>	14%	34%	19%	0%	16%	27%	45%	0%	0%	--
Somewhat	<b>57%</b>	86%	0%	65%	100%	84%	73%	55%	100%	100%	--
Not really	<b>18%</b>	0%	66%	17%	0%	0%	0%	0%	0%	0%	--
Not at all	<b>0%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	--
I don't know	<b>0%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	--

Base: Respondents who have employees in their company and who indicated having a formal or an informal structure in place to organize captured knowledge. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Knowledge accessibility

> To what extent is the knowledge captured accessible to employees? “Accessible” refers to the extent to which all pertinent employees have access to the information.

	Total (n=376)	Atlantic Canada (n=19)*	Quebec (n=86)	Ontario (n=112)	Western Canada (n=159)
Very accessible	40%	44%	36%	42%	39%
Somewhat accessible	51%	53%	49%	47%	54%
Not really accessible	9%	2%	14%	9%	5%
Not at all accessible	0%	0%	1%	1%	0%
I don't know	1%	0%	0%	0%	2%

	Total (n=376)	Fewer than 5 employees (n=108)	5 to 19 employees (n=149)	20 to 49 employees (n=61)	50 or more employees (n=58)
Very accessible	40%	43%	39%	32%	29%
Somewhat accessible	51%	47%	52%	58%	57%
Not really accessible	9%	8%	8%	8%	15%
Not at all accessible	0%	0%	1%	2%	0%
I don't know	1%	2%	0%	0%	0%

Base: Respondents who have employees in their company and who indicated having a formal or an informal structure in place to organize captured knowledge. Those who answered “I prefer not to answer” were excluded from the calculation base.



# Knowledge accessibility (cont'd)

> To what extent is the knowledge captured accessible to employees? “Accessible” refers to the extent to which all pertinent employees have access to the information.

	Total (n=376)	Retail – 20 or more employees (n=10)*	Retail – less than 20 employees (n=30)	Other services (except Public Administration) (n=36)	Construction (n=26)*	Professional, Scientific and Technical Services (n=88)	Health Care and Social Assistance (n=14)*	Accommodation and Food Services (n=12)*	Wholesale Trade (n=24)*	Manufacturing (n=63)	Management and Remediation Services (n=4)*	Transportation and Warehousing (n=16)*
Very accessible	<b>40%</b>	29%	30%	43%	38%	43%	24%	9%	33%	46%	78%	52%
Somewhat	<b>51%</b>	64%	58%	52%	55%	47%	57%	74%	64%	41%	22%	46%
Not really	<b>9%</b>	7%	9%	5%	7%	8%	8%	17%	4%	13%	0%	2%
Not at all	<b>0%</b>	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%
I don't know	<b>1%</b>	0%	0%	0%	0%	2%	12%	0%	0%	0%	0%	0%

	Total (n=376)	Agriculture, Forestry, Fishing and Hunting (n=6)*	Real Estate and Rental and Leasing (n=2)*	Finance and Insurance (n=10)*	Arts, Entertainment and Recreation (n=7)*	Management of Companies and Enterprises (n=8)*	Information and Cultural Industries (n=12)*	Educational Services (n=4)*	Mining, Quarrying and Oil and Gas Extraction (n=3)*	Public Administration (n=1)*	Utilities (n=0)*
Very accessible	<b>40%</b>	14%	0%	28%	29%	37%	74%	56%	0%	100%	--
Somewhat	<b>51%</b>	86%	100%	52%	61%	33%	27%	44%	100%	0%	--
Not really	<b>9%</b>	0%	0%	20%	0%	30%	0%	0%	0%	0%	--
Not at all	<b>0%</b>	0%	0%	0%	11%	0%	0%	0%	0%	0%	--
I don't know	<b>1%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	--

Base: Respondents who have employees in their company and who indicated having a formal or an informal structure in place to organize captured knowledge. Those who answered “I prefer not to answer” were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Encouraging employees' innovativeness

> Is there some kind of structure or mechanism for encouraging employees to share ideas, generate new ones and, ultimately, innovate?

	Total (n=623)	Atlantic Canada (n=43)	Quebec (n=142)	Ontario (n=190)	Western Canada (n=248)
We have a formal structure or mechanism	8%	2%	10%	8%	7%
We have an informal structure or mechanism	45%	44%	42%	46%	45%
We have both formal and informal structures or mechanisms	12%	7%	13%	12%	13%
We do not have such structures or mechanisms	35%	47%	35%	33%	36%

	Total (n=623)	Fewer than 5 employees (n=195)	5 to 19 employees (n=258)	20 to 49 employees (n=94)	50 or more employees (n=76)
We have a formal structure or mechanism	8%	5%	10%	9%	20%
We have an informal structure or mechanism	45%	48%	41%	43%	35%
We have both formal and informal structures or mechanisms	12%	11%	14%	13%	15%
We do not have such structures or mechanisms	35%	37%	34%	35%	31%

Base: Respondents who have employees in their company. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.





# Encouraging employees' innovativeness (cont'd)

> Is there some kind of structure or mechanism for encouraging employees to share ideas, generate new ones and, ultimately, innovate?

	Total (n=623)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=65)	Other services (except Public Administration) (n=51)	Construction (n=47)	Professional, Scientific and Technical Services (n=122)	Health Care and Social Assistance (n=22)*	Accommodation and Food Services (n=24)*	Wholesale Trade (n=38)	Manufacturing (n=109)	Management and Remediation Services (n=7)*	Transportation and Warehousing (n=24)*
We have a formal structure or mechanism	<b>8%</b>	0%	0%	10%	2%	9%	31%	4%	3%	11%	36%	13%
We have an informal structure or mechanism	<b>45%</b>	29%	45%	40%	52%	50%	25%	63%	49%	37%	24%	42%
We have both formal and informal structures or mechanisms	<b>12%</b>	10%	11%	4%	13%	18%	9%	10%	13%	11%	13%	18%
We do not have such structures or mechanisms	<b>35%</b>	61%	44%	47%	33%	23%	35%	24%	36%	41%	26%	27%

	Total (n=623)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=7)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=13)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=22)*	Educational Services (n=5)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=1)*	Utilities (n=2)*
We have a formal structure or mechanism	<b>8%</b>	0%	7%	2%	0%	6%	12%	32%	0%	100%	0%
We have an informal structure or mechanism	<b>45%</b>	44%	18%	37%	53%	69%	60%	38%	54%	0%	0%
We have both formal and informal structures or mechanisms	<b>12%</b>	23%	14%	27%	0%	0%	9%	0%	11%	0%	0%
We do not have such structures or mechanisms	<b>35%</b>	34%	61%	33%	47%	25%	19%	31%	35%	0%	100%

Base: Respondents who have employees in their company. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Types of innovation: Core innovation

> **Core innovation** involves optimizing or improving existing products or services for an existing customer base (e.g. a better mouse-trap). Based on this description, what proportion of your company's total innovation resources (including the employees' time and efforts) are invested in core innovation?

	Total (n=565)	Atlantic Canada (n=39)	Quebec (n=126)	Ontario (n=177)	Western Canada (n=223)
Less than 25%	17%	20%	22%	18%	12%
Between 26% and 50%	32%	37%	34%	31%	31%
Between 51% and 75%	28%	26%	24%	31%	29%
More than 75%	22%	17%	20%	20%	27%
Average percentage of total innovation resources	55%	50%	51%	54%	58%

	Total (n=565)	Fewer than 5 employees (n=183)	5 to 19 employees (n=227)	20 to 49 employees (n=86)	50 or more employees (n=69)
Less than 25%	17%	18%	17%	13%	10%
Between 26% and 50%	32%	33%	30%	41%	27%
Between 51% and 75%	28%	28%	27%	30%	38%
More than 75%	22%	21%	26%	16%	25%
Average percentage of total innovation resources	55%	53%	56%	54%	60%

Base: All respondents. Completion of this question was not mandatory.



# Types of innovation: Core innovation (cont'd)

> **Core innovation** involves optimizing or improving existing products or services for an existing customer base (e.g. a better mouse-trap). Based on this description, what proportion of your company's total innovation resources (including the employees' time and efforts) are invested in core innovation?

	Total (n=565)	Retail – 20 or more employees (n=22)*	Retail – less than 20 employees (n=59)	Other services (except Public Administration) (n=43)	Construction (n=40)	Professional, Scientific and Technical Services (n=111)	Health Care and Social Assistance (n=20)*	Accommodati on and Food Services (n=21)*	Wholesale Trade (n=38)	Manufacturing (n=100)	Management and Remediation Services (n=7)*	Transportation and Warehousing (n=19)*
Less than 25%	<b>17%</b>	19%	16%	16%	12%	27%	13%	12%	13%	17%	0%	21%
Between 26% and 50%	<b>32%</b>	35%	26%	30%	31%	29%	27%	22%	28%	38%	39%	33%
Between 51% and 75%	<b>28%</b>	23%	33%	35%	33%	22%	29%	28%	31%	25%	21%	21%
More than 75%	<b>22%</b>	24%	25%	19%	24%	22%	31%	38%	27%	20%	41%	25%
Average percentage of total innovation resources	<b>55%</b>	53%	57%	56%	56%	49%	59%	67%	57%	54%	62%	54%

	Total (n=565)	Agriculture, Forestry, Fishing and Hunting (n=9)*	Real Estate and Rental and Leasing (n=7)*	Finance and Insurance (n=12)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=9)*	Information and Cultural Industries (n=21)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=0)*
Less than 25%	<b>17%</b>	0%	33%	3%	0%	0%	21%	13%	0%	0%	--
Between 26% and 50%	<b>32%</b>	37%	16%	37%	37%	66%	47%	62%	19%	0%	--
Between 51% and 75%	<b>28%</b>	63%	24%	25%	16%	34%	32%	19%	52%	100%	--
More than 75%	<b>22%</b>	0%	28%	35%	47%	0%	0%	6%	29%	0%	--
Average percentage of total innovation resources	<b>55%</b>	62%	52%	64%	64%	50%	45%	49%	72%	60%	--

Base: All respondents. Completion of this question was not mandatory. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Types of innovation: Adjacent innovation

> **Adjacent innovation** involves expanding a product or service the company already provides well, thereby expanding its customer base (e.g. a company uses the knowledge gained from building a good mouse-trap to build a trap for a particular type of rodent found only in South America). Based on this description, what proportion of your company's total innovation resources (including the employees' time and efforts) are invested in adjacent innovation?

	Total (n=565)	Atlantic Canada (n=39)	Quebec (n=126)	Ontario (n=177)	Western Canada (n=223)
Less than 25%	51%	47%	53%	49%	51%
Between 26% and 50%	37%	39%	34%	38%	37%
Between 51% and 75%	9%	11%	9%	7%	10%
More than 75%	4%	3%	4%	5%	3%
Average percentage of total innovation resources	30%	32%	31%	31%	29%

	Total (n=565)	Fewer than 5 employees (n=183)	5 to 19 employees (n=227)	20 to 49 employees (n=86)	50 or more employees (n=69)
Less than 25%	51%	49%	54%	44%	52%
Between 26% and 50%	37%	37%	34%	46%	39%
Between 51% and 75%	9%	9%	8%	7%	7%
More than 75%	4%	4%	4%	2%	1%
Average percentage of total innovation resources	30%	31%	30%	30%	28%

Base: All respondents. Completion of this question was not mandatory.



# Types of innovation: Adjacent innovation (cont'd)

> **Adjacent innovation** involves expanding a product or service the company already provides well, thereby expanding its customer base (e.g. a company uses the knowledge gained from building a good mouse-trap to build a trap for a particular type of rodent found only in South America). Based on this description, what proportion of your company's total innovation resources (including the employees' time and efforts) are invested in adjacent innovation?

	Total (n=565)	Retail – 20 or more employees (n=22)*	Retail – less than 20 employees (n=59)	Other services (except Public Administration) (n=43)	Construction (n=40)	Professional, Scientific and Technical Services (n=111)	Health Care and Social Assistance (n=20)*	Accommodation and Food Services (n=21)*	Wholesale Trade (n=38)	Manufacturing (n=100)	Management and Remediation Services (n=7)*	Transportation and Warehousing (n=19)*
Less than 25%	<b>51%</b>	52%	60%	44%	59%	40%	58%	63%	61%	53%	53%	51%
Between 26% and 50%	<b>37%</b>	26%	34%	52%	29%	42%	29%	32%	25%	33%	47%	38%
Between 51% and 75%	<b>9%</b>	17%	4%	4%	12%	10%	13%	0%	6%	11%	0%	11%
More than 75%	<b>4%</b>	5%	2%	0%	0%	8%	0%	6%	9%	3%	0%	0%
Average percentage of total innovation resources	<b>30%</b>	34%	27%	27%	28%	35%	29%	26%	31%	30%	28%	29%

	Total (n=565)	Agriculture, Forestry, Fishing and Hunting (n=9)*	Real Estate and Rental and Leasing (n=7)*	Finance and Insurance (n=12)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=9)*	Information and Cultural Industries (n=21)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=0)*
Less than 25%	<b>51%</b>	54%	61%	51%	55%	34%	31%	50%	81%	100%	--
Between 26% and 50%	<b>37%</b>	46%	22%	38%	35%	50%	57%	13%	19%	0%	--
Between 51% and 75%	<b>9%</b>	0%	0%	8%	10%	16%	8%	38%	0%	0%	--
More than 75%	<b>4%</b>	0%	17%	3%	0%	0%	4%	0%	0%	0%	--
Average percentage of total innovation resources	<b>30%</b>	26%	31%	25%	26%	34%	36%	32%	18%	8%	--

Base: All respondents. Completion of this question was not mandatory. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Types of innovation: Transformational innovation

> **Transformational innovation** also called “radical innovation” involves developing breakthroughs and inventing products or services for markets that may not yet exist (e.g., developing a revolutionary product that eliminates the need for traps altogether). Based on this description, what proportion of your company’s total innovation resources (including the employees’ time and efforts) are invested in transformational innovation?

	Total (n=565)	Atlantic Canada (n=39)	Quebec (n=126)	Ontario (n=177)	Western Canada (n=223)
Less than 25%	80%	76%	74%	80%	84%
Between 26% and 50%	14%	15%	18%	16%	10%
Between 51% and 75%	3%	5%	2%	3%	4%
More than 75%	2%	5%	5%	1%	2%
Average percentage of total innovation resources	15%	18%	18%	15%	13%

	Total (n=565)	Fewer than 5 employees (n=183)	5 to 19 employees (n=227)	20 to 49 employees (n=86)	50 or more employees (n=69)
Less than 25%	80%	79%	81%	79%	88%
Between 26% and 50%	14%	15%	14%	17%	9%
Between 51% and 75%	3%	3%	4%	3%	0%
More than 75%	2%	3%	1%	1%	2%
Average percentage of total innovation resources	15%	16%	14%	15%	12%

Base: All respondents. Completion of this question was not mandatory.



# Types of innovation: Transformational innovation (cont'd)

> **Transformational innovation** also called “radical innovation” involves developing breakthroughs and inventing products or services for markets that may not yet exist (e.g., developing a revolutionary product that eliminates the need for traps altogether). Based on this description, what proportion of your company’s total innovation resources (including the employees’ time and efforts) are invested in transformational innovation?

	Total (n=565)	Retail – 20 or more employees (n=22)*	Retail – less than 20 employees (n=59)	Other services (except Public Administration) (n=43)	Construction (n=40)	Professional, Scientific and Technical Services (n=111)	Health Care and Social Assistance (n=20)*	Accommodation and Food Services (n=21)*	Wholesale Trade (n=38)	Manufacturing (n=100)	Management and Remediation Services (n=7)*	Transportation and Warehousing (n=19)*
Less than 25%	<b>80%</b>	84%	82%	79%	85%	82%	83%	92%	83%	74%	75%	74%
Between 26% and 50%	<b>14%</b>	16%	12%	10%	10%	12%	9%	8%	17%	21%	25%	20%
Between 51% and 75%	<b>3%</b>	0%	3%	4%	0%	3%	4%	0%	0%	5%	0%	6%
More than 75%	<b>2%</b>	0%	3%	8%	5%	4%	4%	0%	0%	0%	0%	0%
Average percentage of total innovation resources	<b>15%</b>	13%	16%	17%	15%	16%	12%	7%	12%	16%	10%	17%

	Total (n=565)	Agriculture, Forestry, Fishing and Hunting (n=9)*	Real Estate and Rental and Leasing (n=7)*	Finance and Insurance (n=12)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=9)*	Information and Cultural Industries (n=21)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=0)*
Less than 25%	<b>80%</b>	82%	84%	85%	82%	84%	75%	62%	100%	34%	--
Between 26% and 50%	<b>14%</b>	18%	0%	15%	18%	16%	13%	38%	0%	66%	--
Between 51% and 75%	<b>3%</b>	0%	16%	0%	0%	0%	12%	0%	0%	0%	--
More than 75%	<b>2%</b>	0%	0%	0%	0%	0%	0%	0%	0%	0%	--
Average percentage of total innovation resources	<b>15%</b>	12%	17%	11%	10%	15%	18%	19%	10%	31%	--

Base: All respondents. Completion of this question was not mandatory. \* Results presented in *italic* indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Measuring innovation success

> What are your company's main measures of the success of a given innovative project or a collaborative problem-solving endeavour? Multiple answers allowed.

	Total (n=623)	Atlantic Canada (n=44)	Quebec (n=135)	Ontario (n=193)	Western Canada (n=251)
Our clients are satisfied, we see repeat business, we observe customer loyalty and we get referrals	79%	90%	74%	80%	79%
The initiative had contributed to the bottom line, revenues or profit margins	50%	49%	50%	47%	55%
Our brand reputation has improved	48%	55%	46%	43%	52%
Employees are more engaged, motivated or satisfied	47%	48%	57%	40%	49%
We have increased our market share or we're present in new markets	46%	33%	48%	42%	52%
The number of online or in-person visits, or leads has risen	29%	38%	23%	25%	36%
We have commercialized new products or services	29%	23%	41%	29%	24%
We have registered new patents, copyrights or trademarks	8%	2%	13%	8%	6%
Other	2%	4%	3%	2%	2%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.





# Measuring innovation success (cont'd)

> What are your company's main measures of the success of a given innovative project or a collaborative problem-solving endeavour? Multiple answers allowed.

	Total (n=623)	Fewer than 5 employees (n=207)	5 to 19 employees (n=250)	20 to 49 employees (n=92)	50 or more employees (n=74)
Our clients are satisfied, we see repeat business, we observe customer loyalty and we get referrals	79%	76%	82%	84%	81%
The initiative had contributed to the bottom line, revenues or profit margins	50%	45%	54%	66%	62%
Our brand reputation has improved	48%	46%	47%	59%	60%
Employees are more engaged, motivated or satisfied	47%	38%	56%	62%	69%
We have increased our market share or we're present in new markets	46%	42%	48%	56%	69%
The number of online or in-person visits, or leads has risen	29%	32%	29%	17%	25%
We have commercialized new products or services	29%	26%	30%	39%	46%
We have registered new patents, copyrights or trademarks	8%	7%	7%	13%	18%
Other	2%	3%	2%	0%	0%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.



# Measuring innovation success (cont'd)

> What are your company's main measures of the success of a given innovative project or a collaborative problem-solving endeavour? Multiple answers allowed.

	Total (n=623)	Retail – 20 or more employees (n=22)*	Retail – less than 20 employees (n=69)	Other services (except Public Administration) (n=49)	Construction (n=45)	Professional, Scientific and Technical Services (n=120)	Health Care and Social Assistance (n=22)*	Accommodati on and Food Services (n=24)*	Wholesale Trade (n=39)	Manufacturing (n=108)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Our clients are satisfied, we see repeat business, we observe customer loyalty and we get referrals	<b>79%</b>	86%	85%	89%	72%	79%	88%	82%	65%	78%	78%	81%
The initiative had contributed to the bottom line, revenues or profit margins	<b>50%</b>	53%	40%	39%	52%	58%	33%	39%	63%	64%	49%	40%
Our brand reputation has improved	<b>48%</b>	54%	42%	46%	37%	50%	46%	51%	49%	47%	29%	35%
Employees are more engaged, motivated or satisfied	<b>47%</b>	50%	35%	47%	53%	44%	67%	56%	47%	55%	55%	54%
We have increased our market share or we're present in new markets	<b>46%</b>	46%	43%	40%	30%	44%	24%	35%	69%	57%	42%	43%
The number of online or in-person visits, or leads has risen	<b>29%</b>	28%	45%	23%	33%	24%	34%	22%	30%	21%	32%	19%
We have commercialized new products or services	<b>29%</b>	38%	22%	31%	12%	30%	17%	23%	28%	46%	23%	10%
We have registered new patents, copyrights or trademarks	<b>8%</b>	16%	6%	7%	1%	8%	14%	0%	4%	18%	0%	0%
Other	<b>2%</b>	7%	2%	0%	9%	4%	0%	0%	0%	0%	15%	0%

Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# Measuring innovation success (cont'd)

> *What are your company's main measures of the success of a given innovative project or a collaborative problem-solving endeavour? Multiple answers allowed.*

	Total (n=623)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=9)*	Finance and Insurance (n=14)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=9)*	Information and Cultural Industries (n=22)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Our clients are satisfied, we see repeat business, we observe customer loyalty and we get referrals	<b>79%</b>	72%	87%	98%	58%	69%	91%	19%	56%	100%	33%
The initiative had contributed to the bottom line, revenues or profit margins	<b>50%</b>	48%	49%	37%	33%	71%	53%	13%	11%	68%	0%
Our brand reputation has improved	<b>48%</b>	44%	63%	62%	67%	60%	58%	63%	54%	68%	0%
Employees are more engaged, motivated or satisfied	<b>47%</b>	57%	66%	32%	32%	69%	50%	44%	21%	32%	0%
We have increased our market share or we're present in new markets	<b>46%</b>	44%	65%	45%	64%	30%	48%	31%	37%	68%	100%
The number of online or in-person visits, or leads has risen	<b>29%</b>	27%	44%	18%	27%	30%	47%	38%	0%	68%	67%
We have commercialized new products or services	<b>29%</b>	25%	0%	35%	29%	36%	56%	25%	11%	68%	0%
We have registered new patents, copyrights or trademarks	<b>8%</b>	11%	0%	2%	12%	6%	9%	0%	0%	0%	0%
Other	<b>2%</b>	0%	0%	0%	0%	0%	6%	13%	0%	0%	0%

*Base: All respondents. Those who answered "I don't know" or "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.*



# ROI on innovation by timeframe: One year

> How important is it for your company to see a return on innovation investments within the following time period: One year

	Total (n=643)	Atlantic Canada (n=48)	Quebec (n=137)	Ontario (n=199)	Western Canada (n=259)
Very important	38%	39%	30%	39%	43%
Somewhat important	35%	35%	31%	36%	36%
Neither important nor unimportant	15%	13%	24%	14%	11%
Somewhat unimportant	5%	6%	4%	4%	5%
Not at all important	4%	0%	4%	5%	4%
I don't know	3%	7%	7%	3%	1%

	Total (n=643)	Fewer than 5 employees (n=217)	5 to 19 employees (n=257)	20 to 49 employees (n=93)	50 or more employees (n=76)
Very important	38%	43%	35%	27%	28%
Somewhat important	35%	34%	36%	41%	32%
Neither important nor unimportant	15%	12%	17%	19%	22%
Somewhat unimportant	5%	4%	5%	5%	11%
Not at all important	4%	4%	3%	4%	5%
I don't know	3%	2%	4%	5%	3%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.



# ROI on innovation by timeframe: One year (cont'd)

> How important is it for your company to see a return on innovation investments within the following time period: One year

	Total (n=643)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=72)	Other services (except Public Administration) (n=52)	Construction (n=47)	Professional, Scientific and Technical Services (n=124)	Health Care and Social Assistance (n=23)*	Accommodation and Food Services (n=25)*	Wholesale Trade (n=40)	Manufacturing (n=109)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Very important	<b>38%</b>	42%	44%	44%	51%	32%	47%	42%	24%	32%	57%	45%
Somewhat important	<b>35%</b>	28%	39%	29%	27%	32%	23%	21%	55%	40%	31%	36%
Neither important nor unimportant	<b>15%</b>	10%	9%	25%	8%	15%	12%	16%	17%	16%	13%	9%
Somewhat unimportant	<b>5%</b>	4%	5%	1%	8%	9%	9%	4%	4%	3%	0%	3%
Not at all important	<b>4%</b>	2%	3%	1%	2%	9%	0%	0%	0%	5%	0%	0%
I don't know	<b>3%</b>	14%	1%	1%	4%	3%	9%	17%	0%	4%	0%	6%

	Total (n=643)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=21)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Very important	<b>38%</b>	44%	56%	31%	19%	57%	36%	56%	54%	68%	0%
Somewhat important	<b>35%</b>	39%	39%	34%	64%	11%	36%	38%	26%	32%	33%
Neither important nor unimportant	<b>15%</b>	8%	5%	22%	17%	26%	20%	6%	20%	0%	67%
Somewhat unimportant	<b>5%</b>	0%	0%	0%	0%	6%	2%	0%	0%	0%	0%
Not at all important	<b>4%</b>	0%	0%	14%	0%	0%	7%	0%	0%	0%	0%
I don't know	<b>3%</b>	10%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# ROI on innovation by timeframe: Three years

> How important is it for your company to see a return on innovation investments within the following time period: Three years

	Total (n=640)	Atlantic Canada (n=48)	Quebec (n=135)	Ontario (n=199)	Western Canada (n=258)
Very important	46%	43%	27%	52%	50%
Somewhat important	36%	33%	45%	33%	35%
Neither important nor unimportant	8%	15%	10%	5%	8%
Somewhat unimportant	4%	2%	3%	6%	2%
Not at all important	2%	0%	4%	2%	3%
I don't know	5%	7%	11%	3%	2%

	Total (n=640)	Fewer than 5 employees (n=216)	5 to 19 employees (n=257)	20 to 49 employees (n=91)	50 or more employees (n=76)
Very important	46%	43%	47%	56%	48%
Somewhat important	36%	38%	35%	29%	40%
Neither important nor unimportant	8%	8%	8%	9%	4%
Somewhat unimportant	4%	4%	4%	1%	4%
Not at all important	2%	3%	1%	0%	1%
I don't know	5%	5%	5%	5%	3%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.



# ROI on innovation by timeframe: Three years (cont'd)

> How important is it for your company to see a return on innovation investments within the following time period: Three years

	Total (n=640)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=71)	Other services (except Public Administration) (n=51)	Construction (n=47)	Professional, Scientific and Technical Services (n=124)	Health Care and Social Assistance (n=22)*	Accommodati on and Food Services (n=25)*	Wholesale Trade (n=40)	Manufacturing (n=109)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Very important	<b>46%</b>	46%	44%	48%	61%	40%	52%	30%	56%	46%	31%	49%
Somewhat important	<b>36%</b>	39%	34%	37%	28%	40%	34%	50%	38%	34%	32%	39%
Neither important nor unimportant	<b>8%</b>	0%	13%	8%	4%	7%	0%	4%	2%	9%	15%	0%
Somewhat unimportant	<b>4%</b>	0%	4%	3%	4%	5%	4%	0%	0%	4%	0%	3%
Not at all important	<b>2%</b>	0%	3%	1%	0%	4%	0%	0%	0%	2%	23%	3%
I don't know	<b>5%</b>	14%	2%	4%	4%	5%	10%	17%	4%	6%	0%	6%

	Total (n=640)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=21)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Very important	<b>46%</b>	65%	67%	26%	52%	8%	58%	63%	15%	0%	33%
Somewhat important	<b>36%</b>	25%	34%	51%	20%	39%	34%	13%	74%	32%	0%
Neither important nor unimportant	<b>8%</b>	0%	0%	0%	18%	53%	7%	0%	11%	0%	0%
Somewhat unimportant	<b>4%</b>	0%	0%	15%	10%	0%	0%	25%	0%	0%	0%
Not at all important	<b>2%</b>	0%	0%	9%	0%	0%	0%	0%	0%	68%	0%
I don't know	<b>5%</b>	10%	0%	0%	0%	0%	0%	0%	0%	0%	67%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# ROI on innovation by timeframe: Five years

> How important is it for your company to see a return on innovation investments within the following time period: Five years

	Total (n=638)	Atlantic Canada (n=48)	Quebec (n=134)	Ontario (n=198)	Western Canada (n=258)
Very important	49%	49%	32%	52%	55%
Somewhat important	21%	11%	33%	19%	18%
Neither important nor unimportant	14%	20%	14%	12%	14%
Somewhat unimportant	4%	2%	3%	6%	3%
Not at all important	7%	8%	6%	7%	6%
I don't know	6%	10%	12%	4%	4%

	Total (n=638)	Fewer than 5 employees (n=216)	5 to 19 employees (n=256)	20 to 49 employees (n=90)	50 or more employees (n=76)
Very important	49%	45%	52%	52%	56%
Somewhat important	21%	22%	18%	23%	26%
Neither important nor unimportant	14%	16%	13%	11%	8%
Somewhat unimportant	4%	3%	5%	8%	1%
Not at all important	7%	9%	5%	1%	5%
I don't know	6%	6%	7%	5%	4%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.





# ROI on innovation by timeframe: Five years (cont'd)

> How important is it for your company to see a return on innovation investments within the following time period: Five years

	Total (n=638)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=70)	Other services (except Public Administration) (n=51)	Construction (n=47)	Professional, Scientific and Technical Services (n=124)	Health Care and Social Assistance (n=22)*	Accommodation and Food Services (n=25)*	Wholesale Trade (n=40)	Manufacturing (n=108)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Very important	49%	32%	49%	63%	64%	43%	53%	44%	48%	50%	20%	63%
Somewhat important	21%	36%	24%	14%	15%	22%	22%	15%	23%	21%	17%	13%
Neither important nor unimportant	14%	8%	17%	15%	10%	11%	6%	18%	15%	12%	0%	8%
Somewhat unimportant	4%	8%	1%	4%	3%	5%	4%	0%	8%	5%	0%	3%
Not at all important	7%	3%	6%	1%	4%	11%	5%	7%	1%	5%	51%	8%
I don't know	6%	14%	4%	4%	5%	7%	10%	17%	6%	7%	12%	6%

	Total (n=638)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=21)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Very important	49%	50%	59%	27%	48%	20%	49%	75%	15%	0%	33%
Somewhat important	21%	27%	23%	40%	7%	13%	32%	0%	31%	32%	0%
Neither important nor unimportant	14%	5%	9%	12%	36%	53%	19%	0%	54%	0%	0%
Somewhat unimportant	4%	0%	0%	12%	0%	0%	0%	0%	0%	0%	0%
Not at all important	7%	0%	0%	9%	10%	13%	0%	25%	0%	68%	0%
I don't know	6%	18%	9%	0%	0%	0%	0%	0%	0%	0%	67%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. \*Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.



# ROI on innovation by timeframe: Ten years

> How important is it for your company to see a return on innovation investments within the following time period: Ten years

	Total (n=636)	Atlantic Canada (n=48)	Quebec (n=133)	Ontario (n=198)	Western Canada (n=257)
Very important	49%	45%	35%	51%	55%
Somewhat important	16%	13%	21%	15%	14%
Neither important nor unimportant	13%	21%	17%	10%	13%
Somewhat unimportant	5%	3%	5%	6%	6%
Not at all important	10%	8%	9%	12%	8%
I don't know	7%	10%	13%	6%	5%

	Total (n=636)	Fewer than 5 employees (n=215)	5 to 19 employees (n=255)	20 to 49 employees (n=90)	50 or more employees (n=76)
Very important	49%	46%	52%	50%	63%
Somewhat important	16%	17%	13%	15%	15%
Neither important nor unimportant	13%	14%	12%	15%	12%
Somewhat unimportant	5%	5%	7%	5%	1%
Not at all important	10%	10%	10%	10%	5%
I don't know	7%	8%	7%	6%	4%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. Numbers in red and green highlight statistically significant differences between sub-groups.



# ROI on innovation by timeframe: Ten years (cont'd)

> How important is it for your company to see a return on innovation investments within the following time period: Ten years

	Total (n=636)	Retail – 20 or more employees (n=24)*	Retail – less than 20 employees (n=70)	Other services (except Public Administration) (n=51)	Construction (n=47)	Professional, Scientific and Technical Services (n=124)	Health Care and Social Assistance (n=22)*	Accommodation and Food Services (n=25)*	Wholesale Trade (n=38)	Manufacturing (n=108)	Management and Remediation Services (n=8)*	Transportation and Warehousing (n=24)*
Very important	49%	32%	51%	60%	70%	42%	53%	44%	49%	49%	7%	63%
Somewhat important	16%	36%	14%	10%	7%	18%	22%	6%	19%	16%	31%	13%
Neither important nor unimportant	13%	4%	20%	14%	8%	10%	6%	19%	11%	13%	0%	8%
Somewhat unimportant	5%	4%	2%	5%	2%	8%	4%	7%	7%	5%	0%	3%
Not at all important	10%	11%	7%	6%	8%	16%	5%	7%	5%	9%	51%	8%
I don't know	7%	14%	6%	5%	5%	7%	10%	17%	9%	9%	12%	6%

	Total (n=636)	Agriculture, Forestry, Fishing and Hunting (n=10)*	Real Estate and Rental and Leasing (n=10)*	Finance and Insurance (n=15)*	Arts, Entertainment and Recreation (n=14)*	Management of Companies and Enterprises (n=10)*	Information and Cultural Industries (n=21)*	Educational Services (n=6)*	Mining, Quarrying and Oil and Gas Extraction (n=5)*	Public Administration (n=2)*	Utilities (n=2)*
Very important	49%	50%	59%	29%	48%	20%	56%	75%	15%	0%	33%
Somewhat important	16%	8%	23%	32%	4%	6%	22%	0%	0%	32%	0%
Neither important nor unimportant	13%	24%	0%	12%	27%	61%	4%	0%	85%	0%	0%
Somewhat unimportant	5%	0%	9%	18%	0%	0%	15%	0%	0%	0%	0%
Not at all important	10%	0%	0%	9%	22%	0%	3%	25%	0%	68%	0%
I don't know	7%	18%	9%	0%	0%	13%	0%	0%	0%	0%	67%

Base: All respondents. Those who answered "I prefer not to answer" were excluded from the calculation base. \* Results presented in italic indicate small samples. Results are not statistically significant and should be interpreted with caution. These results are more indicative of a potential trend.

## Research and Market Intelligence at BDC

[marketingresearch@bdc.ca](mailto:marketingresearch@bdc.ca)

Business Development Bank of Canada

Head Office 5 Place Ville Marie, Suite 600, Montreal QC H3B 5E7

