

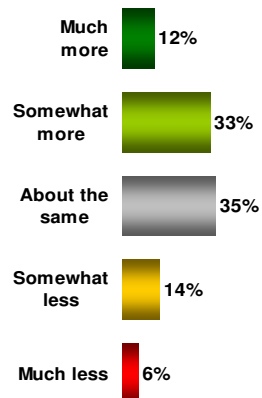


Annual Business Conditions Survey (2009)

Methodology

- This survey was conducted by Ipsos Reid on behalf of the Ontario Construction Secretariat.
- In total, 1043 telephone (CATI) interviews were conducted with trade contractors in Ontario between January 26th and February 10th, 2009.
- The margin of error for a sample of 1043 interviews is 3.0%, nineteen times out of twenty. The margin of error for sub-sections of the sample is larger, depending on the sample size.
- The final data was weighted according to the number of trade contractor establishments working in the ICI sectors per economic region within the province of Ontario according to the latest Statistics Canada data.

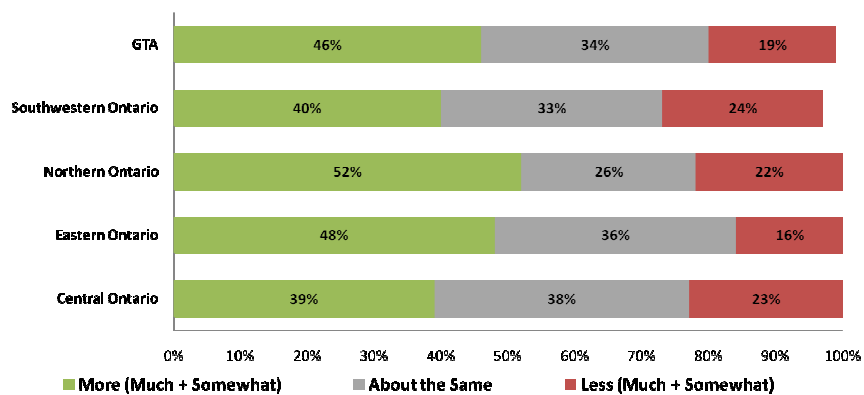
A Strong 2008 for Ontario's Contractors



45% of contractors indicated they conducted more work in 2008 than 2007

Regional Variations in the Amount of Business Conducted in 2008

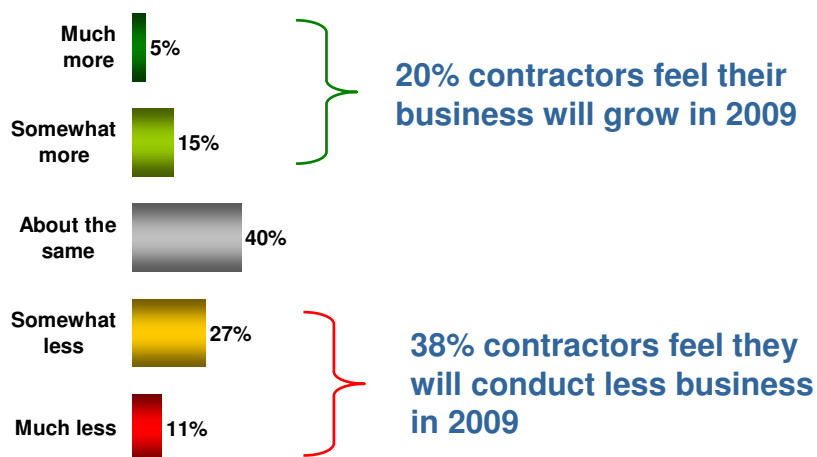
Contractors in Northern Ontario, Eastern Ontario and the GTA are the most likely to mention conducting more work in 2008.



Factors Impacting Business Outlook

- 70% of firms feel the current economic environment will negatively impact their business
- 50% of contractors believe there will be fewer new business opportunities in 2009
- Nearly half of firms believe the availability of skilled workers and supervisors/foreman will increase in 2009
- More firms believe that access to credit will decrease than increase

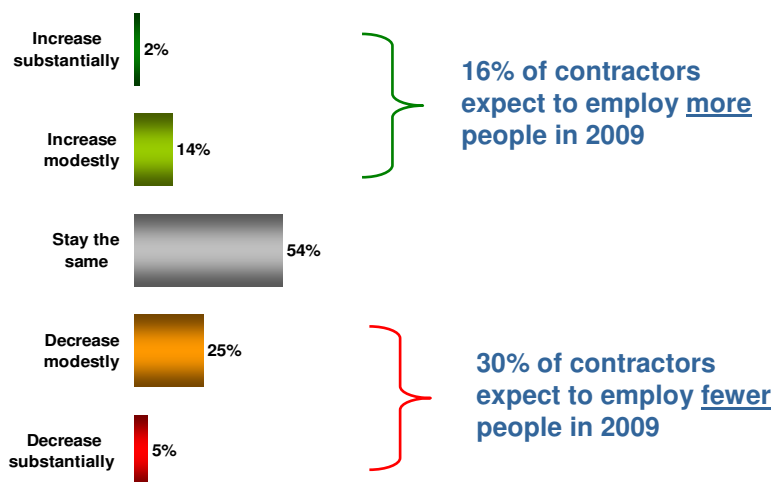
Business Outlook for 2009



Business Outlook for 2009, by Region

<i>Economic Region</i>	More (Much + Somewhat)	About the Same	Less (Much + Somewhat)
Total %	20%	40%	38%
Ottawa	23%	40%	38%
Kingston-Pembroke	28%	45%	28%
Muskoka-Kawartha	18%	52%	26%
Kitchener-Waterloo-Barrie	23%	40%	35%
Hamilton-Niagara	20%	33%	46%
City of Toronto (416)	19%	41%	40%
Toronto Suburbs (905)	19%	40%	37%
Stratford-Bruce*	30%	30%	40%
London	19%	40%	37%
Windsor-Sarnia	16%	39%	43%
Northeastern	16%	46%	36%
Northwestern	6%	66%	28%

Future Employment Outlook

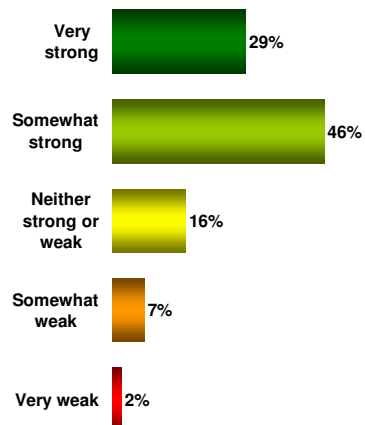


Institutional Strength Anticipated

Sector & Segment	Conduct More Work	Conduct Less Work	NET Difference
Industrial	20%	30%	-10
Institutional	21%	9%	+12
Commercial	33%	29%	+4

Contractors Confident of the Overall Financial Health

Overall Rating of Financial Health



75% of contractors rated their overall financial health as strong or very strong



More Information

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