

**CORE SECTION**

**1. Which of the following best describes your current business situation?**

**1a. Did you access any financial supports through the following orders of government during these extraordinary times?**

**1b. Compared to before the pandemic, would you say your company's current sales are higher, or lower?**

			TOTAL (200)	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER			
				Winnipeg (112)	Other (88)	< 10 (86)	10 - 49 (75)	50 + (39)	Services (169)	Manuf. (26)	Female (58)	Immigrant (30)	IBPOC (25)	
BASE	CURRENT BUSINESS SITUATION	Fully open	Count	188	104	84	80	70	38	160	24	54	30	23
				94%	93%	95%	93%	93%	97%	95%	92%	93%	100%	92%
	Reduced/ Limited capacity	Count	11	7	4	5	5	1	8	2	3		2	
			6%	6%	5%	6%	7%	3%	5%	8%	5%		8%	
	Suspended operations	Count	1	1		1			1		1			
		1%	1%		1%				1%		2%			
FINANCIAL SUPPORTS ACCESSED	Federal government	Cases	100	60	40	33	43	24	83	15	37	15	16	
			50%	54%	45%	38%	57%	62%	49%	58%	64%	50%	64%	
	Provincial government	Cases	52	30	22	17	20	15	47	4	21	7	7	
			26%	27%	25%	20%	27%	38%	28%	15%	36%	23%	28%	
	(Net) Both Federal & Provincial	Cases	37	23	14	9	16	12	34	3	15	4	6	
			19%	21%	16%	10%	21%	31%	20%	12%	26%	13%	24%	
	Others	Cases	2	2			1	1	2		1		2	
			1%	2%			1%	3%	1%		2%		8%	
	(Not sure which)	Cases	26	12	14	12	10	4	24	1	5	1	2	
			13%	11%	16%	14%	13%	10%	14%	4%	9%	3%	8%	
(None/NS)	Cases	59	33	26	33	18	8	49	9	10	11	6		
		30%	29%	30%	38%	24%	21%	29%	35%	17%	37%	24%		
SALES COMPARED TO PRE-PANDEMIC	Significantly higher	Count	15	8	7	3	8	4	13	2	6	3	2	
			8%	7%	8%	3%	11%	10%	8%	8%	10%	10%	8%	
	Slightly higher	Count	61	32	29	26	21	14	45	14	17	10	7	
			31%	29%	33%	30%	28%	36%	27%	54%	29%	33%	28%	
	About the same	Count	59	38	21	23	26	10	50	8	11	8	7	
			30%	34%	24%	27%	35%	26%	30%	31%	19%	27%	28%	
	Slightly lower	Count	37	20	17	14	17	6	35	1	13	4	6	
			19%	18%	19%	16%	23%	15%	21%	4%	22%	13%	24%	
	Significantly lower	Count	25	13	12	19	3	3	24	1	11	5	3	
			13%	12%	14%	22%	4%	8%	14%	4%	19%	17%	12%	
(Refused/DK/NS)	Count	3	1	2	1		2	2						
		2%	1%	2%	1%		5%	1%						
Summary	Higher		38%	36%	41%	34%	39%	46%	34%	62%	40%	43%	36%	
	Same		30%	34%	24%	27%	35%	26%	30%	31%	19%	27%	28%	
	Lower		31%	29%	33%	38%	27%	23%	35%	8%	41%	30%	36%	
	(DK)		2%	1%	2%	1%		5%	1%					

**CORE SECTION**

- 2. Would you say that you and your business are better off, worse off, or just the same financially as you were a year ago?**  
**3. Looking ahead, do you think that a year from now your business will be better off, worse off, or just the same financially as you are today?**

			TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
				Winnipeg	Other	< 10	10 - 49	50 +	Services	Manuf.	Female	Immigrant	IBPOC
BASE			(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)
BUSINESS COMPARED TO YEAR AGO	Better off	Count	54	35	19	17	22	15	46	7	19	10	11
			27%	31%	22%	20%	29%	38%	27%	27%	33%	33%	44%
	Same	Count	89	54	35	43	33	13	75	12	23	11	7
			45%	48%	40%	50%	44%	33%	44%	46%	40%	37%	28%
	Worse off	Count	48	20	28	22	18	8	41	7	15	8	6
			24%	18%	32%	26%	24%	21%	24%	27%	26%	27%	24%
	(DK/NS)	Count	9	3	6	4	2	3	7		1	1	1
			5%	3%	7%	5%	3%	8%	4%		2%	3%	4%
BUSINESS A YEAR FROM NOW	Better off	Count	67	38	29	30	26	11	59	7	16	12	8
			34%	34%	33%	35%	35%	28%	35%	27%	28%	40%	32%
	Same	Count	77	43	34	35	30	12	65	11	26	9	10
			39%	38%	39%	41%	40%	31%	38%	42%	45%	30%	40%
	Worse off	Count	36	17	19	11	14	11	32	3	12	5	4
			18%	15%	22%	13%	19%	28%	19%	12%	21%	17%	16%
	(DK/NS)	Count	20	14	6	10	5	5	13	5	4	4	3
			10%	13%	7%	12%	7%	13%	8%	19%	7%	13%	12%

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**CORE SECTION**

**4. Are you optimistic, or pessimistic, about the economic future of Winnipeg?**

			TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
				Winnipeg	Other	< 10	10 - 49	50 +	Services	Manuf.	Female	Immigrant	IBPOC
BASE			(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)
ECONOMIC FUTURE OF WINNIPEG	Very optimistic	Count	15	11	4	3	8	4	15		4	3	2
			8%	10%	5%	3%	11%	10%	9%		7%	10%	8%
	Somewhat optimistic	Count	82	54	28	29	34	19	68	13	21	11	12
			41%	48%	32%	34%	45%	49%	40%	50%	36%	37%	48%
	Somewhat pessimistic	Count	51	32	19	21	21	9	45	6	16	9	7
			26%	29%	22%	24%	28%	23%	27%	23%	28%	30%	28%
	Very pessimistic	Count	18	12	6	14	3	1	13	4	4	3	
			9%	11%	7%	16%	4%	3%	8%	15%	7%	10%	
	(DK/NS)	Count	34	3	31	19	9	6	28	3	13	4	4
			17%	3%	35%	22%	12%	15%	17%	12%	22%	13%	16%
Summary	Optimistic		49%	58%	36%	37%	56%	59%	49%	50%	43%	47%	56%
	Pessimistic		35%	39%	28%	41%	32%	26%	34%	38%	34%	40%	28%
	(DK)		17%	3%	35%	22%	12%	15%	17%	12%	22%	13%	16%

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**CORE SECTION**

**5. Thinking about 12 months from now, do you expect that the number of people employed by your company in Manitoba will be larger, smaller, or will it be about the same as it is today?**

			TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
				Winnipeg	Other	< 10	10 - 49	50 +	Services	Manuf.	Female	Immigrant	IBPOC
BASE			(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)
COMPANY SIZE IN 12 MTHS	Larger staff	Count	49	30	19	12	20	17	43	6	15	12	6
			25%	27%	22%	14%	27%	44%	25%	23%	26%	40%	24%
	About the same	Count	137	75	62	70	50	17	117	18	41	16	16
			69%	67%	70%	81%	67%	44%	69%	69%	71%	53%	64%
	Smaller staff	Count	11	5	6	3	4	4	8	2	2	1	2
			6%	4%	7%	3%	5%	10%	5%	8%	3%	3%	8%
	(DK/NS)	Count	3	2	1	1	1	1	1	1		1	1
			2%	2%	1%	1%	1%	3%	1%			3%	4%

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**CORE SECTION**

**6. Are you anticipating a need to have layoffs or a reduction in working hours for your staff during the next six months?**

			TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
				Winnipeg	Other	< 10	10 - 49	50 +	Services	Manuf.	Female	Immigrant	IBPOC
BASE			(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)
ANTICIPATING NEXT 6 MTHS	(Net) YES	Cases	20	8	12	11	7	2	18	1	9	3	2
			10%	7%	14%	13%	9%	5%	11%	4%	16%	10%	8%
	Reduction in work hours	Cases	16	6	10	7	7	2	15		8	3	
			8%	5%	11%	8%	9%	5%	9%		14%	10%	
	Layoffs	Cases	9	4	5	5	3	1	7	1	4	2	2
			5%	4%	6%	6%	4%	3%	4%	4%	7%	7%	8%
	Maybe	Cases	11	7	4	5	2	4	9	2	3	1	1
			6%	6%	5%	6%	3%	10%	5%	8%	5%	3%	4%
	No	Cases	162	92	70	65	66	31	138	22	44	24	21
			81%	82%	80%	76%	88%	79%	82%	85%	76%	80%	84%
	(DK/NS)	Cases	7	5	2	5		2	4	1	2	2	1
			4%	4%	2%	6%		5%	2%	4%	3%	7%	4%

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**CORE SECTION**

**6a. In the past year, have you had difficulty finding qualified new employees with relevant skills?**

			TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
				(200)	Winnipeg (112)	Other (88)	< 10 (86)	10 - 49 (75)	50 + (39)	Services (169)	Manuf. (26)	Female (58)	Immigrant (30)
DIFFICULTY FINDING QUALIFIED NEW EMPLOYEES	Yes	Count	139	75	64	44	63	32	119	17	47	21	17
			70%	67%	73%	51%	84%	82%	70%	65%	81%	70%	68%
	No	Count	46	27	19	28	11	7	36	9	7	9	7
			23%	24%	22%	33%	15%	18%	21%	35%	12%	30%	28%
	(DK/NS)	Count	15	10	5	14	1		14		4		1
			8%	9%	6%	16%	1%		8%		7%		4%

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**CORE SECTION**

**6b. Thinking about the various business challenges your company might be facing in 2023, which of the following are the most significant concerns?**

**\*\* MOST SIGNIFICANT CONCERN \*\***

			TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
				(200)	Winnipeg (112)	Other (88)	< 10 (86)	10 - 49 (75)	50 + (39)	Services (169)	Manuf. (26)	Female (58)	Immigrant (30)
BASE  MOST SIGNIFICANT CONCERN	Increased operating costs/ inflation	Cases	91	50	41	40	37	14	76	14	27	15	13
			46%	45%	47%	47%	49%	36%	45%	54%	47%	50%	52%
	Attracting/ retaining staff	Cases	42	26	16	10	17	15	37	4	11	6	5
			21%	23%	18%	12%	23%	38%	22%	15%	19%	20%	20%
	Supply chain disruption	Cases	36	19	17	14	15	7	30	5	12	4	2
			18%	17%	19%	16%	20%	18%	18%	19%	21%	13%	8%
	Taxation	Cases	15	10	5	12	2	1	12	3	3	4	3
			8%	9%	6%	14%	3%	3%	7%	12%	5%	13%	12%
	Increased competition/ new competitors	Cases	5	1	4	2	2	1	5		2		
			3%	1%	5%	2%	3%	3%	3%		3%		
	Employee/ customer health/ safety	Cases	2	1	1	2			1		1		1
			1%	1%	1%	2%			1%		2%		4%
	Remote work issues/ bringing staff back to workplace	Cases	1	1			1		1		1		1
			1%	1%			1%		1%		2%		4%
(None of these/NS)	Cases	8	4	4	6	1	1	7		1	1		
		4%	4%	5%	7%	1%	3%	4%		2%	3%		

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**CORE SECTION**

**6b. Thinking about the various business challenges your company might be facing in 2023, which of the following are the most significant concerns?**

**\*\* TOP 2 CONCERNS \*\***

			TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
				(200)	Winnipeg (112)	Other (88)	< 10 (86)	10 - 49 (75)	50 + (39)	Services (169)	Manuf. (26)	Female (58)	Immigrant (30)
TOP 2 CONCERNS	Increased operating costs/ inflation	Cases	144	81	63	62	57	25	123	20	47	21	20
			72%	72%	72%	72%	76%	64%	73%	77%	81%	70%	80%
	Attracting/ retaining staff	Cases	90	50	40	28	37	25	77	9	26	17	13
			45%	45%	45%	33%	49%	64%	46%	35%	45%	57%	52%
	Supply chain disruption	Cases	67	38	29	25	29	13	56	10	17	8	5
			34%	34%	33%	29%	39%	33%	33%	38%	29%	27%	20%
	Taxation	Cases	43	22	21	26	11	6	36	7	12	5	7
			22%	20%	24%	30%	15%	15%	21%	27%	21%	17%	28%
	Increased competition/ new competitors	Cases	25	13	12	13	6	6	21	3	7	5	1
			13%	12%	14%	15%	8%	15%	12%	12%	12%	17%	4%
	Employee/ customer health/ safety	Cases	8	6	2	4	4		6	1	3	1	2
			4%	5%	2%	5%	5%		4%	4%	5%	3%	8%
	Remote work issues/ bringing staff back to workplace	Cases	7	6	1	2	4	1	5	2	2	1	2
			4%	5%	1%	2%	5%	3%	3%	8%	3%	3%	8%
	(None of these/NS)	Cases	8	4	4	6	1	1	7		1	1	
			4%	4%	5%	7%	1%	3%	4%		2%	3%	

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index



**CORE SECTION**

**7. How well do you feel each of the following three levels of government have been performing in terms of creating a good climate for business?**

			TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
				Winnipeg (112)	Other (88)	< 10 (86)	10 - 49 (75)	50 + (39)	Services (169)	Manuf. (26)	Female (58)	Immigrant (30)	IBPOC (25)
BASE			(200)										
FEDERAL GOVERNMENT	Excellent	Count	3	2	1	1	1	1	3		2	2	
			2%	2%	1%	1%	1%	3%	2%		3%	7%	
	Good	Count	26	13	13	10	12	4	21	5	10	2	5
			13%	12%	15%	12%	16%	10%	12%	19%	17%	7%	20%
	Fair	Count	65	43	22	31	20	14	58	6	17	5	3
			33%	38%	25%	36%	27%	36%	34%	23%	29%	17%	12%
	Poor	Count	99	51	48	41	40	18	81	15	27	21	17
			50%	46%	55%	48%	53%	46%	48%	58%	47%	70%	68%
	(DK/NS)	Count	7	3	4	3	2	2	6		2		
			4%	3%	5%	3%	3%	5%	4%		3%		
PROVINCIAL GOVERNMENT	Excellent	Count	5	3	2		4	1	5		3	2	
			3%	3%	2%		5%	3%	3%		5%	7%	
	Good	Count	37	19	18	11	17	9	28	9	16	10	6
			19%	17%	20%	13%	23%	23%	17%	35%	28%	33%	24%
	Fair	Count	83	44	39	38	30	15	73	10	20	8	8
			42%	39%	44%	44%	40%	38%	43%	38%	34%	27%	32%
	Poor	Count	69	44	25	35	22	12	59	7	18	10	11
			35%	39%	28%	41%	29%	31%	35%	27%	31%	33%	44%
	(DK/NS)	Count	6	2	4	2	2	2	4		1		
			3%	2%	5%	2%	3%	5%	2%		2%		
MUNICIPAL GOVERNMENT	Excellent	Count	5	2	3	1	1	3	4	1	2	1	
			3%	2%	3%	1%	1%	8%	2%	4%	3%	3%	
	Good	Count	42	15	27	10	24	8	32	10	14	7	5
			21%	13%	31%	12%	32%	21%	19%	38%	24%	23%	20%
	Fair	Count	82	53	29	42	24	16	76	6	23	10	8
			41%	47%	33%	49%	32%	41%	45%	23%	40%	33%	32%
	Poor	Count	60	39	21	26	24	10	49	8	15	12	11
			30%	35%	24%	30%	32%	26%	29%	31%	26%	40%	44%
	(DK/NS)	Count	11	3	8	7	2	2	8	1	4		1
			6%	3%	9%	8%	3%	5%	5%	4%	7%		4%

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**CORE SECTION**

**7. How well do you feel each of the following three levels of government have been performing in terms of creating a good climate for business?**

**\*\* SUMMARY TABLE \*\***

		TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
			Winnipeg	Other	< 10	10 - 49	50 +	Services	Manuf.	Female	Immigrant	IBPOC
BASE		(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)
FEDERAL GOVERNMENT	Exc/Good	15%	13%	16%	13%	17%	13%	14%	19%	21%	13%	20%
	Fair/Poor	82%	84%	80%	84%	80%	82%	82%	81%	76%	87%	80%
	(DK)	4%	3%	5%	3%	3%	5%	4%		3%		
PROVINCIAL GOVERNMENT	Exc/Good	21%	20%	23%	13%	28%	26%	20%	35%	33%	40%	24%
	Fair/Poor	76%	79%	73%	85%	69%	69%	78%	65%	66%	60%	76%
	(DK)	3%	2%	5%	2%	3%	5%	2%		2%		
MUNICIPAL GOVERNMENT	Exc/Good	24%	15%	34%	13%	33%	28%	21%	42%	28%	27%	20%
	Fair/Poor	71%	82%	57%	79%	64%	67%	74%	54%	66%	73%	76%
	(DK)	6%	3%	9%	8%	3%	5%	5%	4%	7%		4%

*PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index*

**CORE SECTION**

**8. How concerned are you about the security of your company computer networks and the potential of a cyber-attack?**

			TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
				Winnipeg	Other	< 10	10 - 49	50 +	Services	Manuf.	Female	Immigrant	IBPOC
BASE			(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)
SECURITY OF NETWORKS	Extremely concerned	Count	39	23	16	15	15	9	31	8	11	6	4
			20%	21%	18%	17%	20%	23%	18%	31%	19%	20%	16%
	Somewhat concerned	Count	93	55	38	36	35	22	81	10	25	11	8
			47%	49%	43%	42%	47%	56%	48%	38%	43%	37%	32%
	Not very concerned	Count	46	22	24	23	19	4	38	7	13	7	10
			23%	20%	27%	27%	25%	10%	22%	27%	22%	23%	40%
	Not at all concerned	Count	22	12	10	12	6	4	19	1	9	6	3
			11%	11%	11%	14%	8%	10%	11%	4%	16%	20%	12%
Summary	Concerned		66%	70%	61%	59%	67%	79%	66%	69%	62%	57%	48%
	Unconcerned		34%	30%	39%	41%	33%	21%	34%	31%	38%	43%	52%

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**CORE SECTION**

**9. Has your company taken any actions to protect your computer network from a cyber-attack?  
10. Which of the following actions has your company taken?**

			TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
				(200)	Winnipeg (112)	Other (88)	< 10 (86)	10 - 49 (75)	50 + (39)	Services (169)	Manuf. (26)	Female (58)	Immigrant (30)
BASE			(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)
TAKEN ACTION TO PROTECT NETWORKS	Yes	Count	144	85	59	51	59	34	121	22	42	27	19
			72%	76%	67%	59%	79%	87%	72%	85%	72%	90%	76%
	No	Count	56	27	29	35	16	5	48	4	16	3	6
			28%	24%	33%	41%	21%	13%	28%	15%	28%	10%	24%
BASE: TAKEN ACTION			(144)	(85)	(59)	(51)	(59)	(34)	(121)	(22)	(42)	(27)	(19)
TAKEN TO PROTECT NETWORK	Acquired software/ tech to detect/ protect	Cases	94	54	40	28	42	24	77	16	30	24	14
			65%	64%	68%	55%	71%	71%	64%	73%	71%	89%	74%
	Hired IT specialist/ IT firm	Cases	79	48	31	20	37	22	67	12	26	11	12
			55%	56%	53%	39%	63%	65%	55%	55%	62%	41%	63%
	Identified risks/ vulnerabilities	Cases	75	40	35	19	34	22	64	10	23	16	10
			52%	47%	59%	37%	58%	65%	53%	45%	55%	59%	53%
	Made response/ recovery plan	Cases	74	41	33	20	33	21	61	12	22	15	10
			51%	48%	56%	39%	56%	62%	50%	55%	52%	56%	53%
	Designated cyber security individual	Cases	70	40	30	19	27	24	59	10	21	16	11
			49%	47%	51%	37%	46%	71%	49%	45%	50%	59%	58%
	Compliance with cybersecurity requirements	Cases	60	36	24	14	30	16	51	8	18	10	8
			42%	42%	41%	27%	51%	47%	42%	36%	43%	37%	42%
	Implemented digital security policy/ program	Cases	46	26	20	13	20	13	39	7	11	10	5
			32%	31%	34%	25%	34%	38%	32%	32%	26%	37%	26%
Regular cybersecurity training for employees	Cases	43	30	13	11	18	14	37	6	13	11	5	
		30%	35%	22%	22%	31%	41%	31%	27%	31%	41%	26%	
Conducted controlled testing/ simulations	Cases	38	24	14	8	19	11	33	5	8	7	3	
		26%	28%	24%	16%	32%	32%	27%	23%	19%	26%	16%	
(None of these/DK/NS)	Cases	5	2	3	3	1	1	5			1	1	
		3%	2%	5%	6%	2%	3%	4%			2%	4%	
BASE			(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)
# OF ACTIONS TAKEN	None/DK		31%	26%	36%	44%	23%	15%	31%	15%	29%	13%	24%
	1		18%	24%	10%	22%	19%	8%	18%	19%	17%	20%	24%
	2 to 3		14%	13%	15%	15%	11%	18%	14%	19%	12%	10%	12%
	4 to 6		19%	13%	25%	9%	23%	31%	17%	31%	22%	27%	20%
	7 +		19%	23%	14%	9%	25%	28%	20%	15%	19%	30%	20%

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**CORE SECTION**

**11. Has your company - or any organization in Manitoba that you are familiar with - been victimized by a cyber-attack or hack?**

			TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
					Winnipeg	Other	< 10	10 - 49	50 +	Services	Manuf.	Female	Immigrant
BASE			(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)
VICTIMIZED BY CYBER-ATTACK/ HACK	(Net) YES	Cases	90	45	45	38	33	19	72	17	30	18	9
			45%	40%	51%	44%	44%	49%	43%	65%	52%	60%	36%
	Our company	Cases	32	15	17	14	13	5	25	7	7	6	5
			16%	13%	19%	16%	17%	13%	15%	27%	12%	20%	20%
	Other organization	Cases	63	32	31	28	21	14	51	11	24	13	4
			32%	29%	35%	33%	28%	36%	30%	42%	41%	43%	16%
	No	Cases	110	67	43	48	42	20	97	9	28	12	16
			55%	60%	49%	56%	56%	51%	57%	35%	48%	40%	64%

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**CORE SECTION**

**12. Have you seen, read or heard anything about specialized cyber security insurance policies that companies can get to cover or offset the costs of recovery in the event of a cyber-attack or hack? Has your company acquired a specialized cyber security insurance policy?**

			TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
				Winnipeg	Other	< 10	10 - 49	50 +	Services	Manuf.	Female	Immigrant	IBPOC
BASE			(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)
AWARE OF INSURANCE POLICIES	Yes	Count	90	50	40	29	37	24	73	15	34	12	11
			45%	45%	45%	34%	49%	62%	43%	58%	59%	40%	44%
	No	Count	110	62	48	57	38	15	96	11	24	18	14
			55%	55%	55%	66%	51%	38%	57%	42%	41%	60%	56%
BASE: AWARE			(90)	(50)	(40)	(29)	(37)	(24)	(73)	(15)	(34)	(12)	(11)
ACQUIRED CYBER SECURITY INSURANCE	Yes	Count	36	18	18	7	18	11	32	3	14	3	4
			40%	36%	45%	24%	49%	46%	44%	20%	41%	25%	36%
	No	Count	42	25	17	17	16	9	33	8	18	5	4
			47%	50%	43%	59%	43%	38%	45%	53%	53%	42%	36%
	(DK/NS)	Count	12	7	5	5	3	4	8	4	2	4	3
		13%	14%	13%	17%	8%	17%	11%	27%	6%	33%	27%	

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**CORE SECTION**

**13. Does your company/organization currently sell products and/or services to government?  
14. Which levels of government do you sell products or services to?**

			TOTAL (200)	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
				Winnipeg (112)	Other (88)	< 10 (86)	10 - 49 (75)	50 + (39)	Services (169)	Manuf. (26)	Female (58)	Immigrant (30)	IBPOC (25)
BASE													
SELL PRODUCTS TO GOVERNMENT	Yes	Count	59	31	28	19	25	15	51	7	19	6	7
			30%	28%	32%	22%	33%	38%	30%	27%	33%	20%	28%
	No	Count	141	81	60	67	50	24	118	19	39	24	18
			71%	72%	68%	78%	67%	62%	70%	73%	67%	80%	72%
BASE: SELL TO GOVERNMENT			(59)	(31)	(28)	(19)	(25)	(15)	(51)	(7)	(19)	(6)	(7)
SELL PRODUCTS/ SERVICES TO	Government of Manitoba	Cases	51	30	21	14	24	13	45	6	15	4	6
			86%	97%	75%	74%	96%	87%	88%	86%	79%	67%	86%
	Local municipality/ city government	Cases	45	23	22	15	21	9	39	6	14	6	3
			76%	74%	79%	79%	84%	60%	76%	86%	74%	100%	43%
	Government of Canada	Cases	31	18	13	7	15	9	28	3	10	4	4
			53%	58%	46%	37%	60%	60%	55%	43%	53%	67%	57%
	Other Indigenous gov/ band	Cases	21	15	6	7	7	7	20	1	9	1	4
			36%	48%	21%	37%	28%	47%	39%	14%	47%	17%	57%
	Manitoba Métis Federation	Cases	12	7	5	4	3	5	11	1	5		1
			20%	23%	18%	21%	12%	33%	22%	14%	26%		14%
	(Refused/DK/NS)	Cases	1		1				1				
			2%		4%				7%				

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**DEMOGRAPHICS**

**1. Are any of the Manitoba staff in your organization unionized?**

**1a. Is your firm partially or fully owned by someone in the following groups?**

**2. Which of the following categories best describes the principal type of business conducted by your organization?**

**4. What is the annual revenue of your company?**

		TOTAL (200)	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER			
			Winnipeg (112)	Other (88)	< 10 (86)	10 - 49 (75)	50 + (39)	Services (169)	Manuf. (26)	Female (58)	Immigrant (30)	IBPOC (25)	
BASE	Yes	Count	13	9	4	3	4	6	10	3	3	1	1
			7%	8%	5%	3%	5%	15%	6%	12%	5%	3%	4%
	No	Count	182	100	82	81	71	30	157	23	54	29	23
			91%	89%	93%	94%	95%	77%	93%	88%	93%	97%	92%
	(Refused/DK/NS)	Count	5	3	2	2		3	2		1		1
		3%	3%	2%	2%		8%	1%		2%		4%	
PARTIALLY OR FULLY-OWNED BY	Identifies as female	Cases	58	30	28	23	25	10	53	4	58	13	13
			29%	27%	32%	27%	33%	26%	31%	15%	100%	43%	52%
	Born outside Canada	Cases	30	14	16	10	14	6	22	8	13	30	9
			15%	13%	18%	12%	19%	15%	13%	31%	22%	100%	36%
	Racialized/ visible minority	Cases	14	11	3	8	5	1	13		7	8	14
			7%	10%	3%	9%	7%	3%	8%		12%	27%	56%
	Indigenous	Cases	13	6	7	5	6	2	11	1	8	1	13
			7%	5%	8%	6%	8%	5%	7%	4%	14%	3%	52%
	LGBTQ2S+	Cases	6	5	1	3	3		5	1	3	2	2
			3%	4%	1%	3%	4%		3%	4%	5%	7%	8%
	Physical/ intellectual/ cognitive disability	Cases	6	3	3	5	1		5	1	3	3	1
			3%	3%	3%	6%	1%		3%	4%	5%	10%	4%
	(None of these)	Cases	95	58	37	41	37	17	79	14			
			48%	52%	42%	48%	49%	44%	47%	54%			
	(Refused/NS)	Cases	20	9	11	9	4	7	17	1			
		10%	8%	13%	10%	5%	18%	10%	4%				
PRINCIPAL TYPE OF BUSINESS	Services	Count	169	98	71	74	65	30	169		53	22	23
			85%	88%	81%	86%	87%	77%	100%		91%	73%	92%
	Manufacturing	Count	26	12	14	10	8	8		26	4	8	1
			13%	11%	16%	12%	11%	21%		100%	7%	27%	4%
	Resources	Count	2	1	1	1	1				1		1
		1%	1%	1%	1%	1%				2%		4%	
(Refused/DK/NS)	Count	3	1	2	1	1	1						
		2%	1%	2%	1%	1%	3%						
ANNUAL REVENUES	Less than \$1 million	Count	64	35	29	56	8		56	7	17	7	9
			32%	31%	33%	65%	11%		33%	27%	29%	23%	36%
	\$1 million to \$5 million	Count	54	31	23	18	35	1	48	6	20	9	10
			27%	28%	26%	21%	47%	3%	28%	23%	34%	30%	40%
	\$5 million to \$20 million	Count	39	23	16	1	21	17	33	4	11	3	3
			20%	21%	18%	1%	28%	44%	20%	15%	19%	10%	12%
	Over \$20 million	Count	21	12	9	1	3	17	16	5	4	4	1
		11%	11%	10%	1%	4%	44%	9%	19%	7%	13%	4%	
(Refused/DK/NS)	Count	22	11	11	10	8	4	16	4	6	7	2	
		11%	10%	13%	12%	11%	10%	9%	15%	10%	23%	8%	



**DEMOGRAPHICS**

**3. How many full and part-time employees do you have in your Manitoba organization?**

		TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER			
			Winnipeg	Other	< 10	10 - 49	50 +	Services	Manuf.	Female	Immigrant	IBPOC	
BASE		(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)	
# OF EMPLOYEES IN MB ORGANIZATION	1 to 4	Count	44	25	19	42	2		39	3	12	2	5
			22%	22%	22%	49%	3%		23%	12%	21%	7%	20%
	5 to 9	Count	36	18	18	35	1		33	3	11	6	8
			18%	16%	20%	41%	1%		20%	12%	19%	20%	32%
	10 to 24	Count	48	24	24	8	38	2	37	10	15	11	5
			24%	21%	27%	9%	51%	5%	22%	38%	26%	37%	20%
	25 to 49	Count	31	17	14		30	1	26	3	9	3	3
			16%	15%	16%		40%	3%	15%	12%	16%	10%	12%
	50 to 99	Count	22	14	8		4	18	16	6	9	7	3
			11%	13%	9%		5%	46%	9%	23%	16%	23%	12%
	100 to 149	Count	7	6	1			7	6	1	1		
			4%	5%	1%			18%	4%	4%	2%		
	150 or more	Count	12	8	4	1		11	12		1	1	1
			6%	7%	5%	1%		28%	7%		2%	3%	4%
Mean		48	62	30	9	26	177	52	31	28	32	34	
Median		13	14	13	5	23	95	13	16	16	18	9	

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**DEMOGRAPHICS**

**3a. How many full-time employees do you have in your Manitoba organization?**

		TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER			
			Winnipeg	Other	< 10	10 - 49	50 +	Services	Manuf.	Female	Immigrant	IBPOC	
BASE		(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)	
# FULL-TIME EMPLOYEES	None	Count	5	3	2	4	1		3	1	4	1	1
			3%	3%	2%	5%	1%		2%	4%	7%	3%	4%
	1 to 4	Count	64	32	32	59	5		58	5	14	6	10
			32%	29%	36%	69%	7%		34%	19%	24%	20%	40%
	5 to 9	Count	28	16	12	18	10		25	3	7	6	3
			14%	14%	14%	21%	13%		15%	12%	12%	20%	12%
	10 to 24	Count	42	23	19	4	34	4	34	7	17	7	4
			21%	21%	22%	5%	45%	10%	20%	27%	29%	23%	16%
	25 to 49	Count	30	18	12		23	7	24	4	10	6	6
			15%	16%	14%		31%	18%	14%	15%	17%	20%	24%
	50 to 99	Count	19	11	8		2	17	13	6	4	3	
			10%	10%	9%		3%	44%	8%	23%	7%	10%	
	100 to 149	Count	3	3				3	3		1		
			2%	3%				8%	2%		2%		
150 or more	Count	9	6	3	1		8	9		1	1	1	
		5%	5%	3%	1%		21%	5%		2%	3%	4%	
Mean		36	48	22	5	20	136	38	28	22	27	25	
Median		10	11	9	3	16	65	9	15	12	12	5	

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**DEMOGRAPHICS**

**3b. How many part-time employees do you have in your Manitoba organization?**

		TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER			
			Winnipeg	Other	< 10	10 - 49	50 +	Services	Manuf.	Female	Immigrant	IBPOC	
BASE		(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)	
# PART-TIME EMPLOYEES	None	Count	62	37	25	28	24	10	51	10	15	11	5
			31%	33%	28%	33%	32%	26%	30%	38%	26%	37%	20%
	1 to 4	Count	79	41	38	50	23	6	64	11	29	10	14
			40%	37%	43%	58%	31%	15%	38%	42%	50%	33%	56%
	5 to 9	Count	17	9	8	7	8	2	15	2	5	4	2
			9%	8%	9%	8%	11%	5%	9%	8%	9%	13%	8%
	10 to 24	Count	19	9	10		15	4	16	3	3	2	1
			10%	8%	11%		20%	10%	9%	12%	5%	7%	4%
	25 to 49	Count	9	6	3		5	4	9		5	3	2
			5%	5%	3%		7%	10%	5%		9%	10%	8%
	50 to 99	Count	8	6	2			8	8		1		
			4%	5%	2%			21%	5%		2%		
	100 to 149	Count	2	1	1			2	2				1
			1%	1%	1%			5%	1%				4%
	150 or more	Count	4	3	1	1		3	4				
			2%	3%	1%	1%		8%	2%				
	Mean		12	15	8	3	6	41	14	3	6	6	9
	Median		2	2	2	1	3	10	2	1	3	2	3

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index

**DEMOGRAPHICS**  
**Region, Gender of Respondent, Company Size**

			TOTAL	REGION		COMPANY SIZE			TYPE OF BUSINESS		OWNER/ PART OWNER		
				Winnipeg	Other	< 10	10 - 49	50 +	Services	Manuf.	Female	Immigrant	IBPOC
BASE			(200)	(112)	(88)	(86)	(75)	(39)	(169)	(26)	(58)	(30)	(25)
REGION	Winnipeg	Count	112	112		45	41	26	98	12	30	14	15
			56%	100%		52%	55%	67%	58%	46%	52%	47%	60%
	Other	Count	88		88	41	34	13	71	14	28	16	10
			44%		100%	48%	45%	33%	42%	54%	48%	53%	40%
GENDER	Male	Count	149	84	65	57	56	36	123	23	36	26	17
			75%	75%	74%	66%	75%	92%	73%	88%	62%	87%	68%
	Female	Count	51	28	23	29	19	3	46	3	22	4	8
			26%	25%	26%	34%	25%	8%	27%	12%	38%	13%	32%
COMPANY SIZE	< 10 employees	Count	86	45	41	86			74	10	23	10	12
			43%	40%	47%	100%			44%	38%	40%	33%	48%
	10 to 49 employees	Count	75	41	34		75		65	8	25	14	11
			38%	37%	39%		100%		38%	31%	43%	47%	44%
	50 + employees	Count	39	26	13			39	30	8	10	6	2
			20%	23%	15%			100%	18%	31%	17%	20%	8%

PROBE RESEARCH INC. - 2023 Manitoba Business Leaders' Index