



ASSOCIATION QUÉBÉCOISE
DES TECHNOLOGIES

5th Edition

THE AQT 2018 COMPETITIVENESS BAROMETER

Report on the profile and challenges
facing Québec's technology
sector companies



THE AQT 2018 COMPETITIVENESS BAROMETER

The driving force behind this project is to better understand you, thereby better powering your business.

Since 2010, the Québec Technology Association (AQT) has instituted a comprehensive study among technology industry leaders throughout Québec. Our objectives include:

- Establishing a snapshot of our industry and its business practices;
- Providing respondents with a tailored report on 30 indicators - the only one of its kind in North America! and
- Refining our service offer for maximum impact on your business issues and challenges.

Thanks to these results, the AQT can better represent you, enhance its offer, and articulate these key messages in our advocacy work with various authorities. This speaks strongly to the Barometer's significance for the tech industry.

Moreover, by analyzing the results - and often, by reading between the lines - we can better perceive the undercurrents likely to eventually transform our industry. This year, we observed a deepening interest in growth via acquisitions, a trend toward business consolidation whose ramifications extend beyond our borders. We will closely monitor this evolving data, as this trend may have a significant impact in the coming years.

Over the years, we have continued to lay the foundations for our industry's collective memory, and to evolve for the benefit of the companies we serve. Conducted in collaboration with TECHNOCompétences, this fifth edition of our survey focuses more closely on industry challenges relating to human capital. Against a backdrop of labour gaps, we sought to quantify the many obstacles SMEs face in maintaining or accelerating growth.

Once again, we commissioned SOM Research and Surveys to gather and analyze data from 559 respondents. I would like to take this opportunity to warmly thank them for their participation.

I hope you will enjoy this report's insights.



Nicole Martel
Chief Executive Officer
Québec Technology Association (AQT)



Background

The purpose of this enquiry is to survey a representative sample of companies active in Québec's information technology sector. The enquiry's objectives include:

- Regular measurement of changes in our industry's "health";
- Obtaining a variety of indicators relating to organizational performance and governance;
- Compiling this data into a reference document for public consultation;
- Widely distributing this data to influence decision-making likely to impact this ecosystem;
- Drawing inspiration from the collected data when developing our plans and initiatives.

Population

Survey respondents are drawn from Québec's information technology sector. The survey's framework was developed from the membership list of the Québec Technology Association (AQT) and companies identified by TECHNOCompétences (information and communications technology sectoral workforce committee) as well as a list of employers sorted by NAICS code.

Sampling

The file contained a total of 2,238 "pollable" companies. Of these, 1,590 had an email address. Those companies who failed to respond by email were subsequently contacted by telephone. In total, 559 interviews were completed. The final report covers 336 companies, since companies with 1-3 employees and those with over 500 employees were withdrawn from consideration.

Weighting

Survey data was weighted by AQT membership and company size.

Margin of error

The maximum margin of error is 5.2%, 19 times out of 20.





ASSOCIATION QUÉBÉCOISE
DES TECHNOLOGIES

The results of this study are presented under four major themes. These files are available for downloading on our website at aqt.ca.

- Tech Industry SMES at a Glance
- Revenues, sales and marketing of Tech Industry
- Human Resources of Tech Industry SMES
- Tech Industry Challenges and Issues



32, rue des Sœurs-Grises
Montréal (Québec) H3C 2P8
(514) 874-2667
www.aqt.ca

900, boul. René-Lévesque East
Suite 600
Quebec City (Québec) G1R 2B5
(418) 476-6888

