



Science, Innovation and Electronic Information Division

## Bioproducts Development Survey

### Confidential once completed

Collected under the authority of the *Statistics Act*, Revised Statutes of Canada, 1985, Chapter S-19. Completion of this questionnaire is a legal requirement under the *Statistics Act*.  
Si vous préférez ce questionnaire en français, veuillez cocher

### Information for the Respondent

#### Purpose of Survey

Statistics Canada is conducting this survey to produce a profile of firms engaged in the development or production of bioproducts in Canada. The survey focuses on the key characteristics and activities of firms that develop or produce bioproducts as part of their company's activity.

Bioproducts are an emerging sector of the Canadian economy and their impact has the potential to be felt through all parts of the Canadian society. An accurate understanding of bioproducts requires comprehensive data. Information from this survey may be used by businesses for economic or market analysis, by trade associations to study industry performance, government departments and agencies to assist policy formation, and by the academic community for research purposes.

Please report data for 2003 fiscal year for bioproducts development and production activities of your firm in Canada unless a specific question asks otherwise.

#### Authority

Collected under the authority of the *Statistics Act*, Revised Statutes of Canada, 1985, Chapter S-19. Completion of this questionnaire is a legal requirement under the *Statistics Act*.

#### Confidentiality

Statistics Canada is prohibited from publishing any statistics that would divulge information obtained from this survey that relates to any identifiable business, institution or individual. Data are treated in strict confidence, used for statistical purposes and released in aggregate form only. The confidentiality provisions of the *Statistics Act* are not affected by either the *Access to Information Act* or any other Legislation.

#### Who should complete this questionnaire?

A knowledgeable senior person in your firm, such as an R&D manager or production manager, can complete this questionnaire.

#### Assistance

If you have questions or require assistance please contact:

Tel: 1-888-820-1169 or

Fax: 1-888-869-0972

Email: [si eidinfo@statcan.ca](mailto:si eidinfo@statcan.ca)

#### Please provide the following information:

Name of person completing form	Title
Phone ( <input type="text"/> <input type="text"/> <input type="text"/> ) <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Fax ( <input type="text"/> <input type="text"/> <input type="text"/> ) <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
E-mail	Web Address

5-5300-506.1: 2004-08-25 STC/SAT-465-75366

## Section 1 - Use of Biomass and Development or Production of Bioproducts

This section measures your firm's use of biomass and its bioproducts development or production activities.

### 1. Bioproducts Development and Production

A **bioproduct** is defined as a commercial or industrial product (other than food, feed and medicines) made with biological or renewable agricultural (plant, animal) marine or forestry materials.

a) Does **your firm produce or develop bioproducts?**  
(please, refer to the table below for examples of bioproducts)

<sup>1001</sup> <sup>3</sup>  No ► Go to question 2

<sup>1</sup>  Yes  
▼

b) In the table below, please indicate the number of bioproducts your firm currently has for each stage of development:

Bioproducts		Number of bioproducts by stage of development/production		
		R & D <sup>1</sup>	Proof of concept / product development <sup>2</sup>	In production/ On the market <sup>3</sup>
Bio-fuels (methane, ethanol, bio-diesel)	1010			
Bio-energy (heating and electricity)	1020			
Bio-sensors	1030			
Biocatalysts	1040			
Bio-chemicals (e.g. bio-solvents, bio-adhesives, bio-surfactants, bio-lubricants, fine chemicals, etc.)	1050			
Bio-plastics	1060			
Biopesticides/bio-fungicides/bio-herbicides	1070			
Fiber composites	1080			
Fiberboard/Agri-fiber panels	1090			
Other bioproducts or biomaterials, please specify:	1100			

### 2. Use of biomass by your firm

**Biomass** is defined as renewable or sustainable feedstock/materials of agriculture, animal, forestry, marine or aquaculture origins or from municipal and industrial waste.

a) Does your firm **use biomass?**  
(please refer to the table below for examples of biomass)

<sup>2001</sup> <sup>3</sup>  No  
 Yes  
▼

b) In the table below, please indicate the types of biomass used by your firm (check all that apply).

2010	<input type="checkbox"/> <b>Agricultural crop biomass:</b> crops and crop residues, dedicated energy crops (switchgrass, wheatgrass, silver maple, hybrid poplar, cottonwood, etc.), industrial crops (flax, hemp, canola, corn, etc.)
2020	<input type="checkbox"/> <b>Forestry biomass:</b> forestry products/slash; mill waste/residues, wood and wood residues
2030	<input type="checkbox"/> <b>Marine and aquaculture materials/products</b>
2040	<input type="checkbox"/> <b>Food processing products and by-products:</b> animals, plants
2050	<input type="checkbox"/> <b>Animal manure</b>
2060	<input type="checkbox"/> <b>Industrial organic waste</b> (e.g. sludge)
2070	<input type="checkbox"/> <b>Municipal organic waste</b> (e.g. household waste)
2080	<input type="checkbox"/> Other sustainable/renewable feedstock/materials, please specify: <input type="text"/>

If your firm develops or produces at **least one type of bioproducts** listed in 1 b)

OR

If your firm uses **at least one type of biomass** listed in 2 b)

▶ Go to question 3

If your firm **does not develop or produce any bioproducts** listed in 1 b)

AND

If your firm **does not use any biomass** listed in 2 b)

▶ **Please return the questionnaire in the accompanying prepaid envelope. Thank you for your collaboration.**

**3. Is the principal biomass input** used by your firm a:  
(Please check one)

- 3001  Primary product (e.g. soybean, corn, hemp, flax, etc.)  
3002  By-product (e.g. straw, fat, etc.)  
3003  Recycled product (e.g. cooking oil, industrial sludge)

**4. How far** (in km) is your firm from its principal source of biomass?

- 4001  On site  
4002  ≤ 50 km  
4003  > 50 km

**5. Does your firm get or purchase its biomass principally from a:**

- 5001  Domestic source (including production of biomass as a result of your firms' activities)  
5002  Foreign source (outside of Canada)

**6. Is (are) your firm's bioproduct(s).**  
(check all that apply)

- 6001  Sold directly to consumers or distributors  
6002  Sold to other firms to be used as input(s)  
6003  Produced for internal use

**7. a) Are the bioproducts development or production activities of your firm located at an address other than that on the questionnaire?**

7001 <sup>3</sup>  No ▶ Go to question 8

<sup>1</sup>  Yes



b) Please provide the address of the location of the bioproducts development or production activities.  
If more than one location, please provide the address to the location where these activities mostly take place.

City

Province

Postal Code

## Section 2 - Benefits from developing or producing bioproducts

8. Please rate the importance of the following benefits obtained by your firm as a result of developing or producing bioproducts.

		Importance									
		Low	←	→	High						
Reduced production cost	8001	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Reduced energy consumption	8002	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Reduced damages to the environment	8003	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Developed new market niche/new products	8004	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Increased product range	8005	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Improved product value/performance	8006	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Increased sales/market share	8007	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Other, please specify: <input type="text"/>	8008	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>

## Section 3 - Barriers to developing or producing bioproducts

9. Please indicate the importance of the following barriers your firm experienced in the development or production of bioproducts by your firm.

		Importance									
		Low	←	→	High						
Unreliable supply of raw materials/feedstock	9001	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Higher price of raw materials/feedstock	9002	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Higher transportation cost of main feedstock/ raw material	9003	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Lack of technology/technical information	9004	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Lack of skilled human resources	9005	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Lack of financial capital	9006	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Difficulty to substitute/integrate into existing processes	9007	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Negative public perception/acceptance	9008	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Restrictions on Intellectual Property (IP) rights	9009	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Higher cost and timeliness of regulatory approval	9010	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Lack of adequate product standard/certification	9011	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>
Other, please specify: <input type="text"/>	9012	1	<input type="radio"/>	2	<input type="radio"/>	3	<input type="radio"/>	4	<input type="radio"/>	5	<input type="radio"/>

## Section 4 - Firm Characteristics

10. What year did your firm become engaged in bioproducts-related activities?

10001

11. How did your firm become involved in developing or producing bioproducts? (Please check one)

- 11001  Mainly as a result of activities of your firm (as part of an R&D project)
- 11002  In co-operation/collaboration with other firms or organizations
- 11003  Merger with/acquisition of another firm
- 11004  Purchase of another firm's bioproducts development activities without merging or acquiring it
- 11005  Other means, please specify:

12. a) Is your firm a **spin-off**? A spin-off is defined as a new firm created to transfer and commercialize inventions and technology developed in universities, firms or government laboratories.

- 12001 <sup>3</sup>  No ▶ Go to question 13.
- <sup>1</sup>  Yes



b) Is your firm a **spin-off from**:

- 12010  University
- 12020  Another firm
- 12030  Government Agency/lab
- 12040  Other, please specify:

13. Is your firm a subsidiary of a Multi-National Enterprise (MNE)?

- 13001 <sup>3</sup>  No
- <sup>1</sup>  Yes

14. Are the shares of your firm traded on the stock market?

- 14001 <sup>3</sup>  No
- <sup>1</sup>  Yes

15. What is the majority stock ownership of your firm?

- 15001  Canadian
- 15002  US
- 15003  Mexican
- 15004  Other Foreign Country

## Section 5 - Human resources in bioproducts development or production

16. For the purpose of this survey Employees are defined as those workers for whom you completed a Canada Revenue Agency T-4 statement for the 2003 tax year. **Include working owners. Do not include students. Only count employees working in Canada. If an employee performs more than one duty, report their primary responsibility.** Count each person only once. Please report typical employment level for 2003. If '0' (zero) indicate '0'.

	Number of employees in 2003
Total number of employees in Canada	16001
<b>Number of employees with bioproducts-related responsibilities:</b>	16002
Scientific research and development (e.g. scientists, R&D managers, industrial postdocs, etc.)	16003
Technicians	16004
Management/marketing/finance/production	16005
Other, please specify:	<input type="text"/>

17. Please rate the importance of the following factors on your efforts to fill bioproducts-related vacancies

		Importance				
		Low	←	→	High	
<b>Candidate Factors</b>						
Compensation requirements by candidates too high	17001	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
Candidates unwilling to relocate	17002	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
Lack of experience	17003	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
<b>Firm Factors</b>						
Capital/resources insufficient to attract candidates	17004	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
<b>External Factors</b>						
Lack of qualified candidates	17005	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
Competition for qualified candidates	17006	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
Other, please specify:	17007	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>

### Section 6 - Firm Financial Profile

#### Revenues and Research & Development (R&D) Expenditures

18. Please complete the following table. If information is not available please provide a carefully considered estimate. **Report data for fiscal years.** If '0' (ZERO) please indicate '0', do not leave blanks.

		2002 1	2003 2	2005 Forecast 3
18010	Total Firm Revenues (all sources)	\$ ,000	\$ ,000	\$ ,000
18020	Revenues from Bioproducts	\$ ,000	\$ ,000	\$ ,000
18030	% of revenues from Bioproducts exported	%	%	%
18040	Total R&D spending	\$ ,000	\$ ,000	\$ ,000
18050	R&D spending on Bioproducts	\$ ,000	\$ ,000	\$ ,000
18060	% of Bioproducts R&D spending contracted out	%	%	%

### Section 7 - Intellectual Property

19. a) For bioproducts currently under development or in production, did your firm apply for / acquire / license in the IP rights?

19001 3  No ► Go to question 20.

1  Yes  
▼

b) Which of the following describes the intellectual property rights obtained?  
(check all that apply)

19010  Licensing agreement

19020  Patent assignment

19030  Other, please, specify:

c) Were the IP rights acquired from:

19040  Canadian firms or organizations

19050  Foreign firms or organizations

**Section 8 - Business Practices**

**Contracting Out**

20. a) Did your firm contract out bioproducts-related activities in 2003?

- 20001 <sup>3</sup>  No ► Go to question 21.  
<sup>1</sup>  Yes

Please indicate the number of contracts for each type listed:

Partner Type	Number of Contracts
Private research lab <span style="float: right;">20010</span>	
University <span style="float: right;">20020</span>	
Government Lab <span style="float: right;">20030</span>	
Foreign Firm <span style="float: right;">20040</span>	
Other, please specify: <input type="text"/> <span style="float: right;">20050</span>	

b) For the fiscal year 2003, what was the total value of these bioproducts-related contracts?

20002 \$  ,000

**Collaborative Arrangements**

**Collaborative arrangements** involve the active participation in projects between your company and other companies or organizations in order to develop and/or continue work on new or significantly improved bioproducts processes or products. **Pure contracting-out work is not regarded as collaboration.**

21. Was your firm involved in bioproducts-related collaborative arrangements with other companies or organizations in 2003?

- 21001 <sup>3</sup>  No ► Go to question 23.  
<sup>1</sup>  Yes

Provide the number of arrangements by purpose and partner type:

Purpose of Arrangement	Number of Arrangements by Partner Type				
	Bioproducts Firm <sup>1</sup>	Non-Bioproducts Firm <sup>2</sup>	Academic Institution <sup>3</sup>	Government lab or agency <sup>4</sup>	Other <sup>5</sup>
Knowledge not available internally; Access outside scientific expertise <span style="float: right;">21010</span>					
Cost reduction related to R&D activities <span style="float: right;">21020</span>					
Reduce risk exposure <span style="float: right;">21030</span>					
Other, please specify: <input type="text"/> <span style="float: right;">21040</span>					

**Collaboration with foreign partners**

22. In 2003, was your firm involved in bioproducts-related collaborative arrangements with foreign partners?

- 22001 <sup>3</sup>  No ► Go to question 23.  
<sup>1</sup>  Yes

Please rate the following purposes in your decision to form a collaborative arrangement with a foreign partner.

		Importance				
		Low	←	→	High	
Knowledge not available internally Access outside scientific expertise <span style="float: right;">22010</span>		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
Cost reduction related to R&D activities <span style="float: right;">22020</span>		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
Reduce risk exposure <span style="float: right;">22030</span>		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
Access foreign market <span style="float: right;">22040</span>		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
Other, please specify: <input type="text"/> <span style="float: right;">22050</span>		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>

## Section 9 - Raising Capital

23. a) Did your firm **attempt to raise capital**, including government funding, for purposes related to bioproducts in 2003?

23001 <sup>3</sup>  No ► Go to question 28.

<sup>1</sup>  Yes  
▼

b) Why did you attempt to raise capital?  
(Indicate each category that applies to your firm.)

23010  R&D purposes/expand R&D capacity

23020  Proof of concept/pilot project

23030  Regulatory expenses

23040  Production/manufacturing capability

23050  Operating capital

23060  Repay current investors

23070  Other, please specify:

24. a) Were you successful in raising capital?

24001 <sup>3</sup>  No ► Go to question 26.

<sup>1</sup>  Yes  
▼

b) How much capital did you raise in 2003?

24002 \$  ,000

25. What percentage of your target did you reach?

25001  % If 100%, Go to question 27

26. What reasons did the lender(s) give in limiting or refusing your request for capital?  
(Check all that apply.)

26001  Further product development or proof of concept required

26002  Bioproduct not market-ready

26003  No proof of market demand

26004  Insufficient specific management skills/expertise

26005  Capital not available due to capital market conditions

26006  Intellectual property protection is not available for firm's technology in Canada

26007  Other, please specify:

27. What sources provided capital?

		% of total raised from each source
Canadian based Venture Capital	27001	%
American based Venture Capital	27002	%
Banks, Cooperatives, Credit Union	27003	%
Angel Investors/Family	27004	%
<b>Government sources:</b> Government loans	27005	%
Matching funds	27006	%
Grants	27007	%
Other, please specify: <input type="text"/>	27008	%
IPO (Initial Public Offering)/SPO (Secondary Public Offering)	27009	%
Private placements	27010	%
Collaborative arrangements, alliances	27011	%
Other, please specify: <input type="text"/>	27012	%



## Section 10 - Government Support Programs

28. a) In the past 5 years, did your firm apply for benefits for bioproduct related activities under the Scientific Research and Experimental Development (SR&ED) tax program?

28001 <sup>3</sup>  No ► Go to question 29.

<sup>1</sup>  Yes  
▼

b) How much did you apply for in 2003?

28002 \$  ,000

c) What are your cumulative credits?

28003 \$  ,000

29. During the last three years, did your firm use any of the following types of programs sponsored by the federal or provincial/territorial governments for activities related to the development or production of bioproducts? (Please check all that apply.)

		Government Programs	
		Federal Government 1	Provincial/Territorial/ Municipal/Government 2
Technology support and assistance programs	29010	<input type="radio"/>	<input type="radio"/>
Loan guarantees	29020	<input type="radio"/>	<input type="radio"/>
Export assistance programs	29030	<input type="radio"/>	<input type="radio"/>
Information or Internet services	29040	<input type="radio"/>	<input type="radio"/>
Support for training	29050		<input type="radio"/>
Other, please specify: <input type="text"/>	29060		<input type="radio"/>

## Section 11 - Strategies Used in 2003

30. How important were each of the following strategies for your firm in 2003?

### Knowledge development strategies

Acquired and used knowledge obtained from other industry sources such as industry associations, competitors, clients and suppliers

		Importance				
		Low	←	→	High	
30001		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>

Acquired and used knowledge obtained from public research institutions including universities and government laboratories

30002		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
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Used and updated databases of scientific information

30003		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
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Developed firm policies and practices for knowledge/intellectual property protection

30004		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
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Developed/encouraged staff education/upgrading

30005		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
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Conducted an Intellectual Property Audit to ensure protection of products and processes at all stages of development

30006		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
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### Business strategies

Increased firm size through acquisition, merger or joint venture

30007		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
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Downsized operations of the firm

30008		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
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Entered product trials/adapted products or processes for increased market penetration

30009		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
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Began new research & development project

30010		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
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Expanded into foreign markets

30011		1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
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Other, please specify:

<input type="text"/>	30012	1 <input type="radio"/>	2 <input type="radio"/>	3 <input type="radio"/>	4 <input type="radio"/>	5 <input type="radio"/>
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31. Approximately, how many minutes did you spend collecting the data and completing this questionnaire?

31001  minutes

Comments

Lined area for comments with a large watermark reading "For information only" diagonally across it.

**Thank you for your assistance.  
Please return the questionnaire in the accompanying prepaid return envelope.**