

Community Futures West Yellowhead Regional Triage Report

Triage BR&E Report

December 2022



Overview



Background

- Four municipalities in West Yellowhead completed parallel business satisfaction surveys to understand how to best support local businesses.
- Four regions were included in the data: the Municipality of Jasper, the Town of Edson, The Town of Hinton and the Hamlet of Grande Cache. The survey received 255 completes (62 from Jasper, 90 from Edson, and 77 from Hinton, and 26 from Grande Cache).
- The Triage BR&E Surveys were commissioned to engage the broader business community, while also allowing for the identification of potential expansion or retention opportunities for follow-up on a business-by-business basis.

Overview



Methodology

- A random sample telephone survey was conducted with 255 businesses. The total response rate for the phone surveys was 23.7% which is very high in the market research industry. The average phone interview length was 12.4 minutes.
- This scientific approach ensures that the results have a high level of accuracy (with a margin of error of +/- 6.1% at a 95% confidence level) and statistically represents the business community in the region.

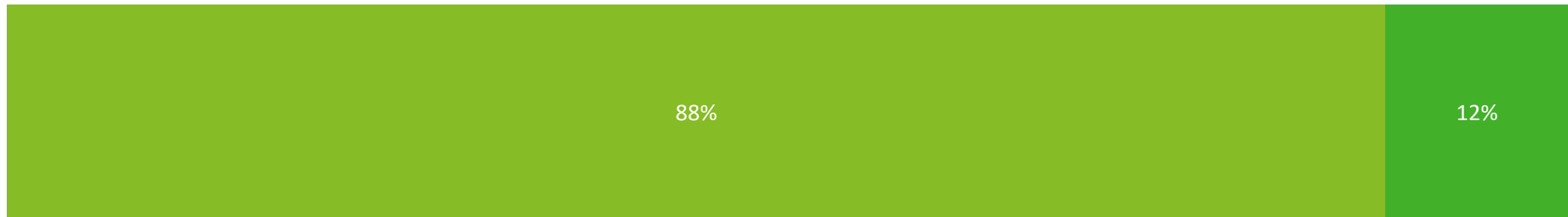


Business Community Firmographics

Firmographics



Ownership (Full Region, N=255)



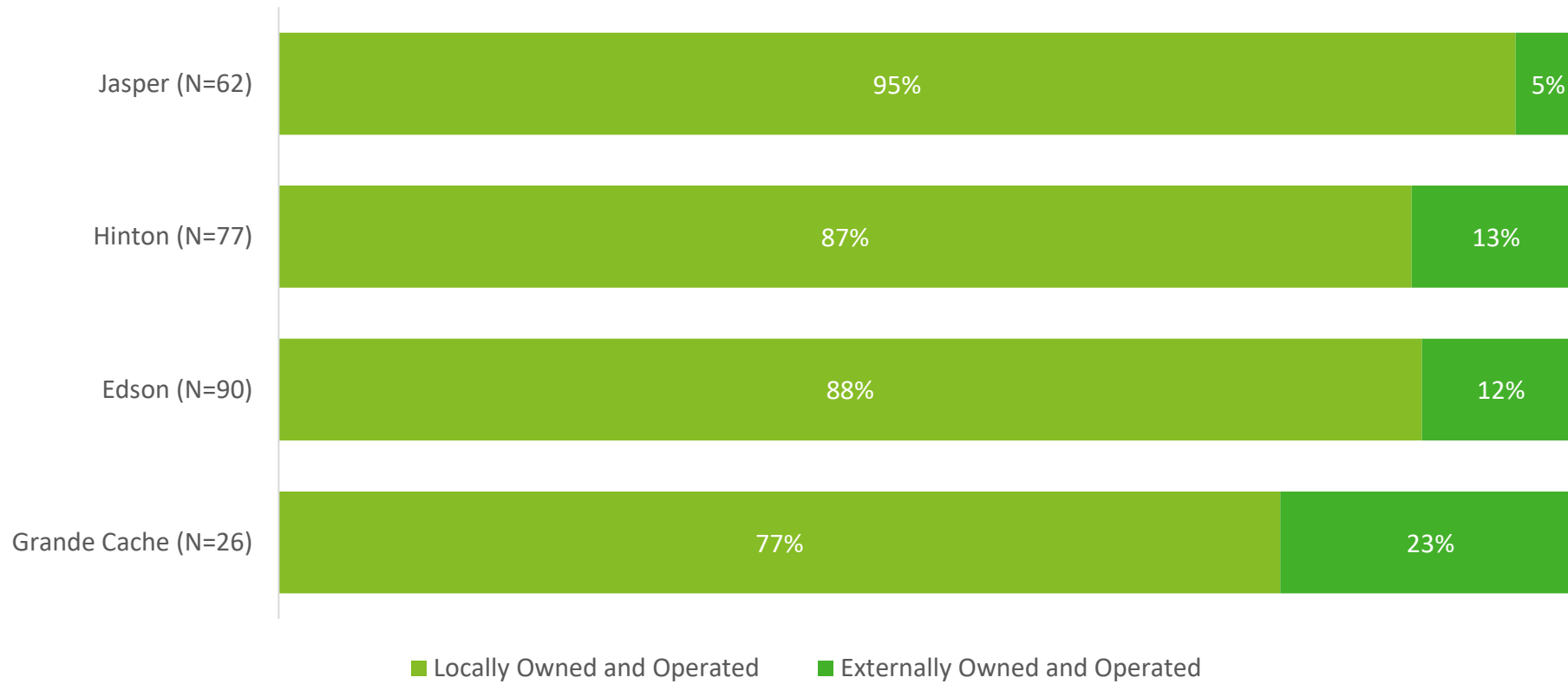
■ Locally Owned and Operated

■ Externally Owned and Operated

Firmographics



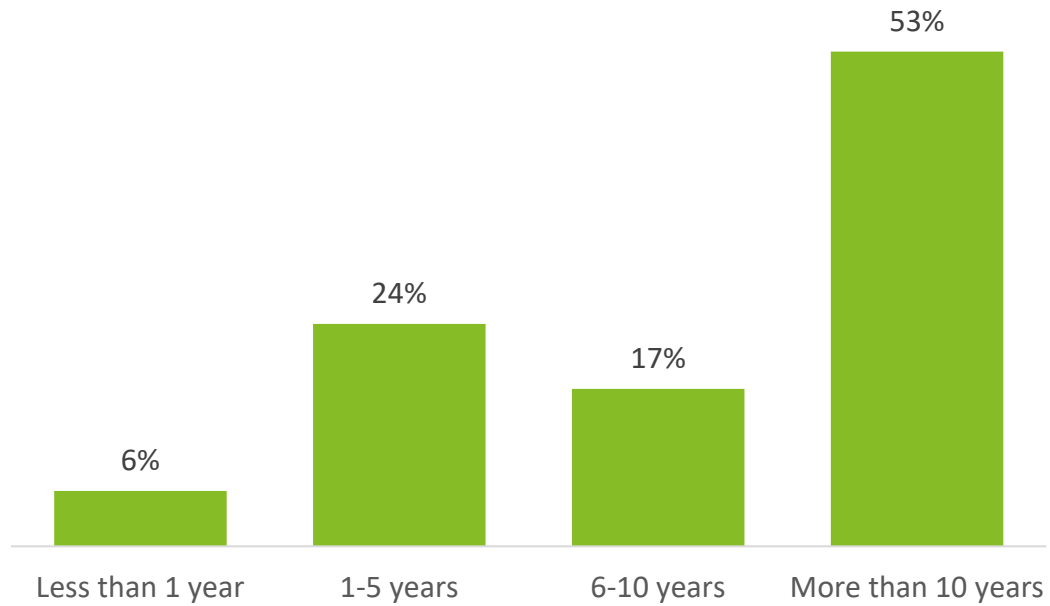
Ownership



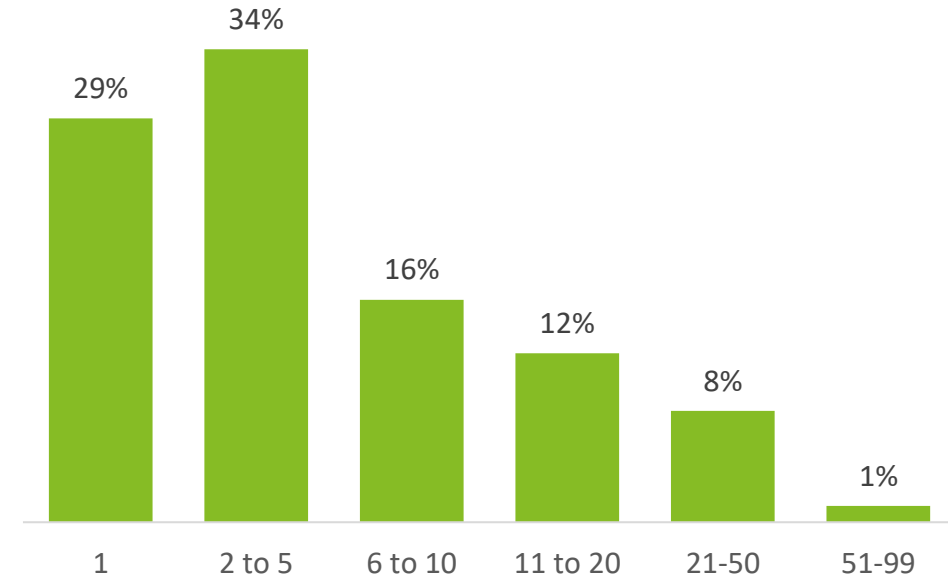
Firmographics



Years Operating in West Yellowhead (Full Region, N=255)



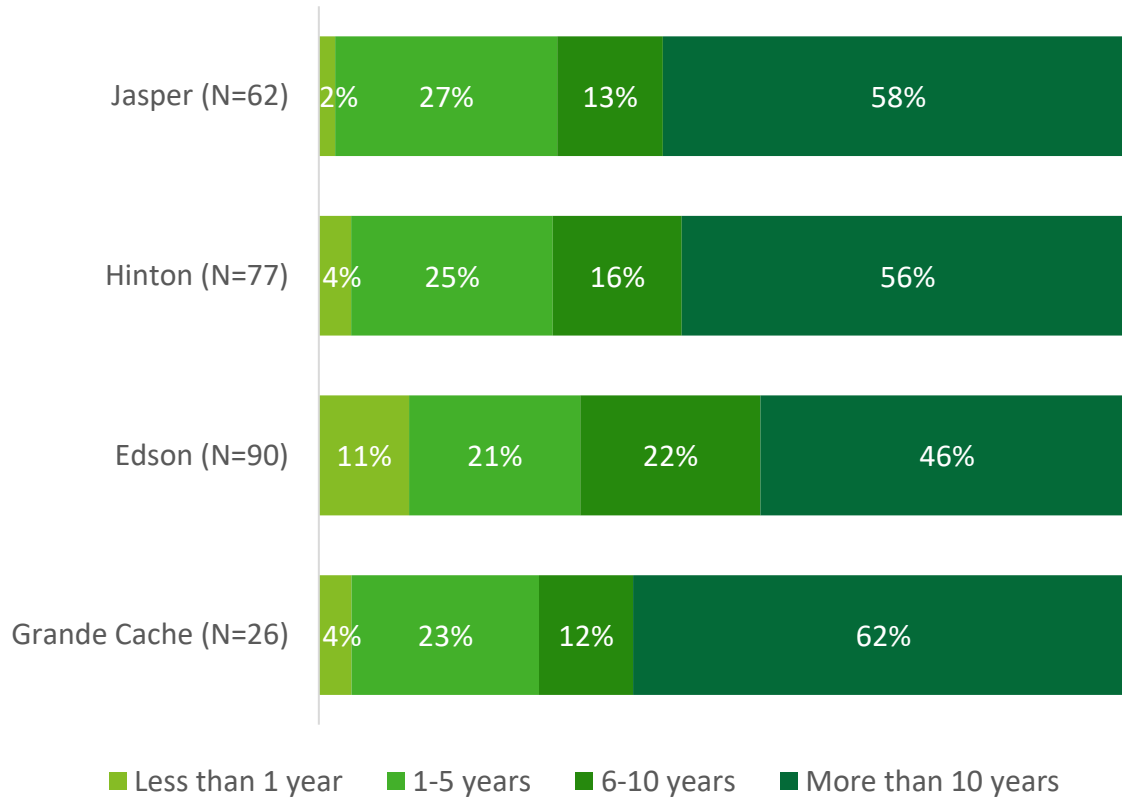
Full-Time Employees (Full Region, N=255)



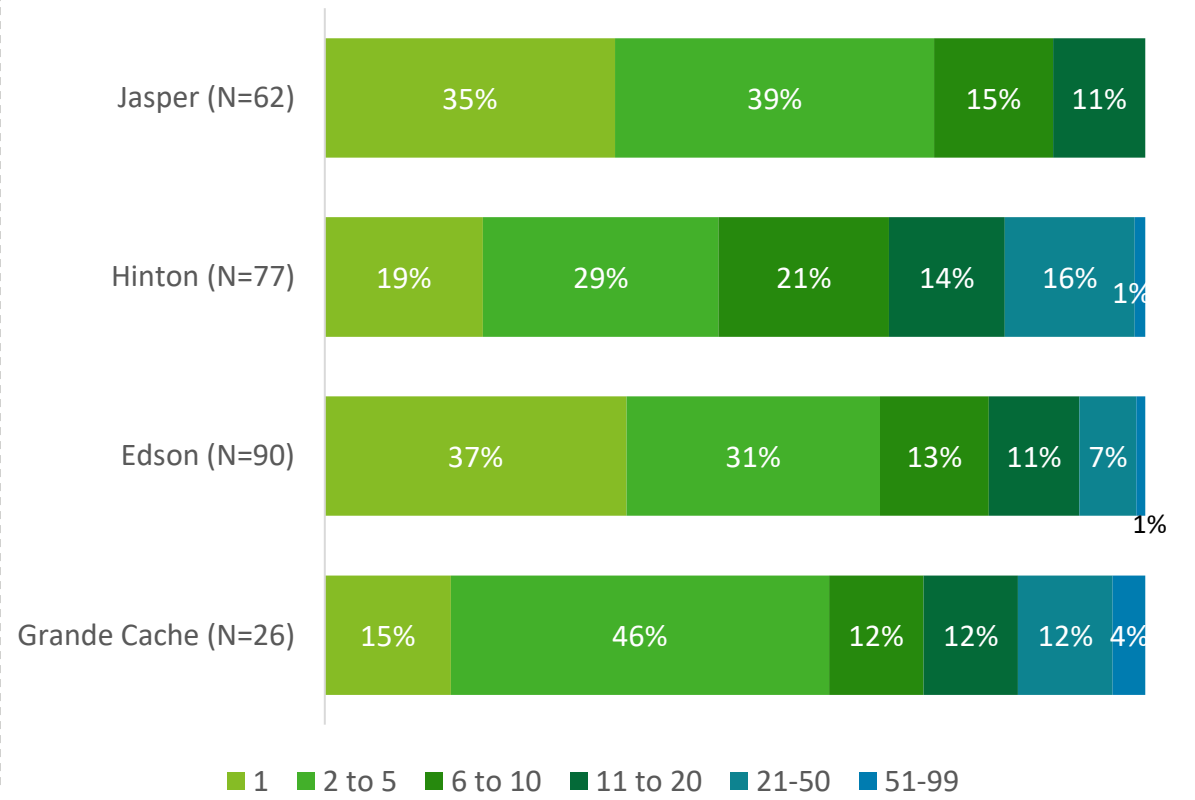
Firmographics



Years Operating in the Region



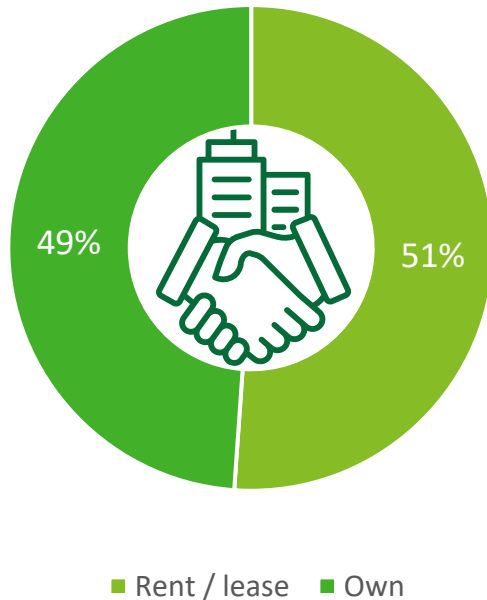
Full-Time Employees



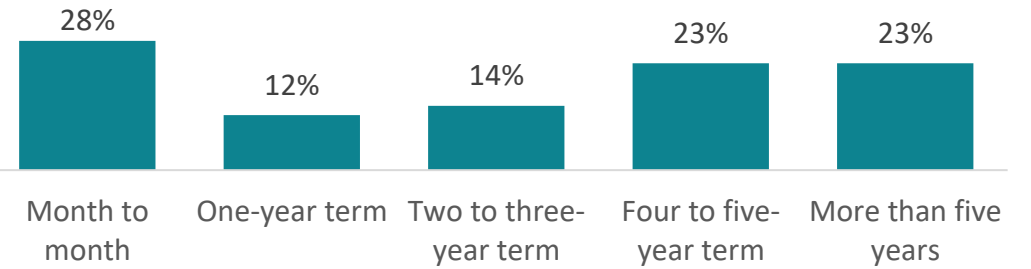
Firmographics



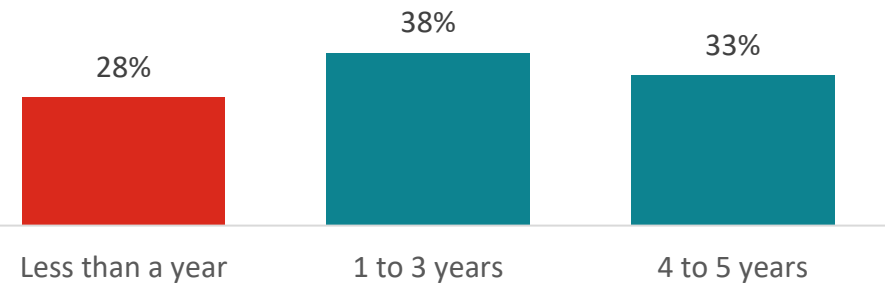
Own or Rent Business Property? (Full Region, N=255)



Term of Lease (N=103):



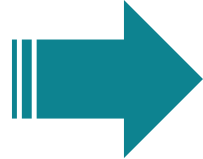
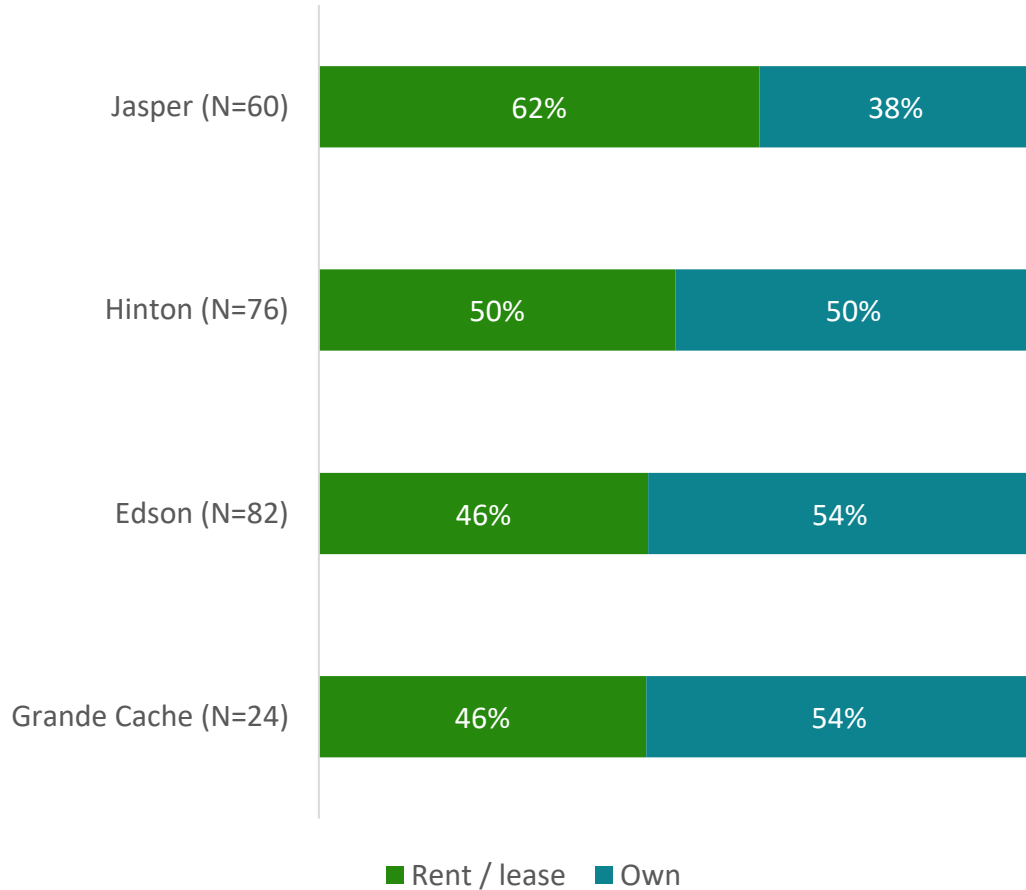
Lease expires (N=81):



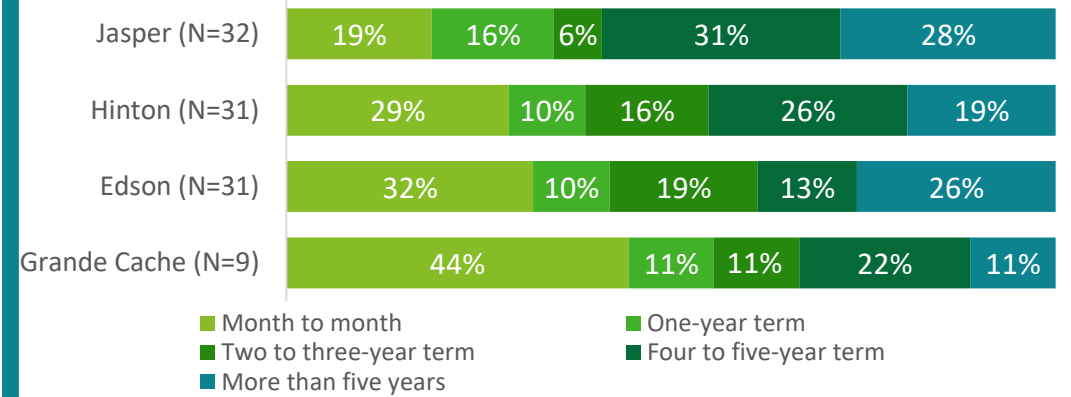
Firmographics



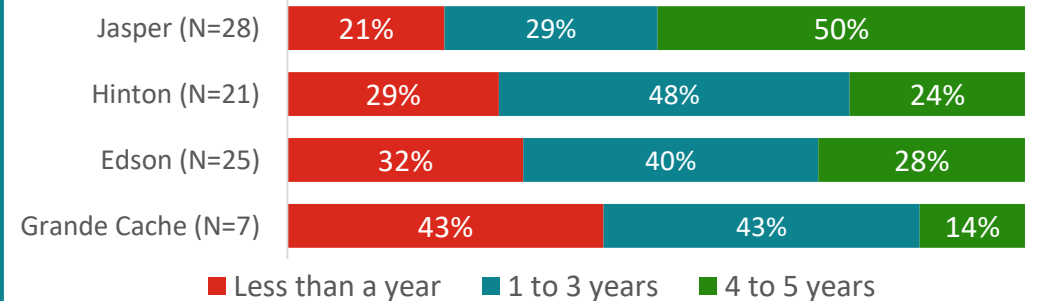
Own or Rent Business Property?



Term of Lease:



Lease Expires:

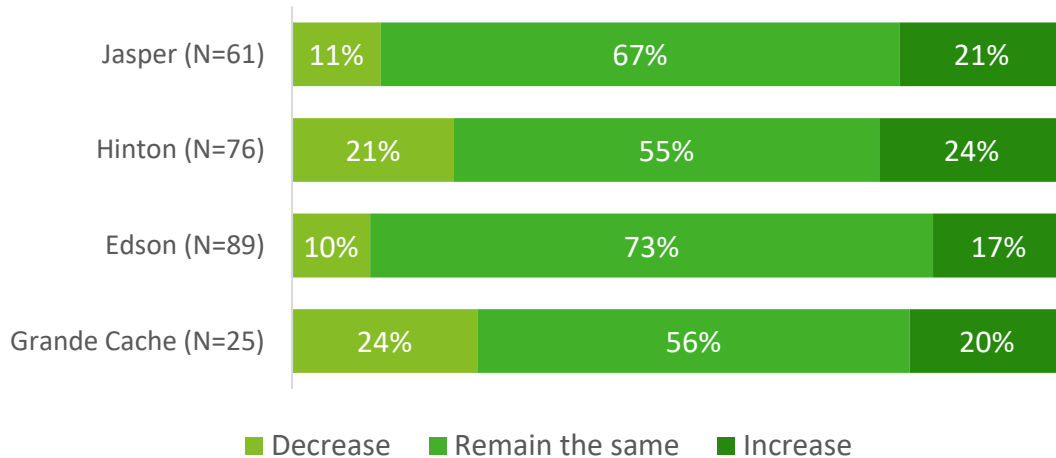
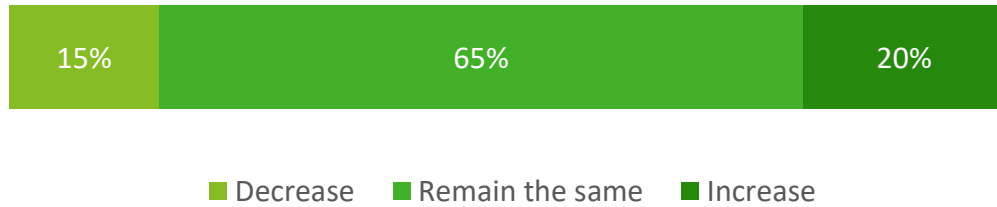




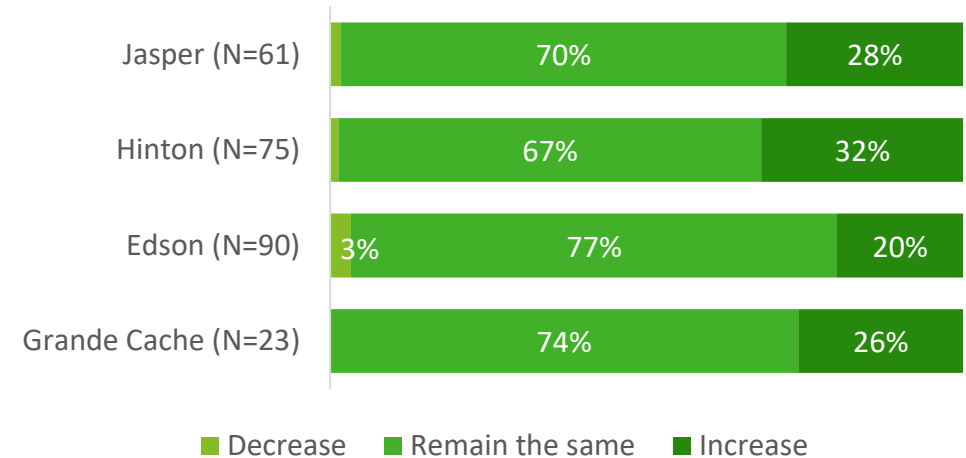
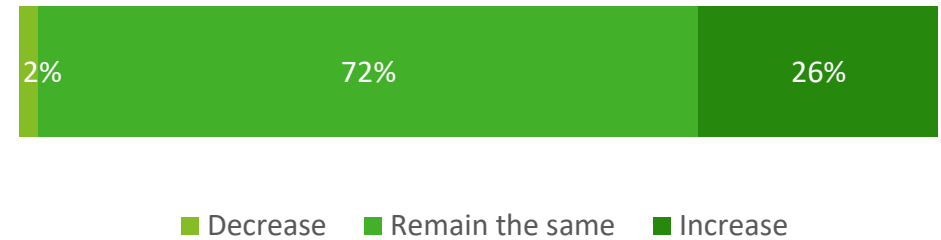
Business Performance

Business Performance

Over the past 12 months did the total number of employees in your company (Full Region, N=251):

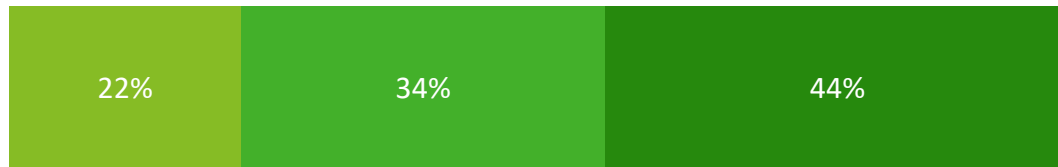


Thinking about the next 12 months, do you expect the total number of employees in your company to (Full Region, N=249):

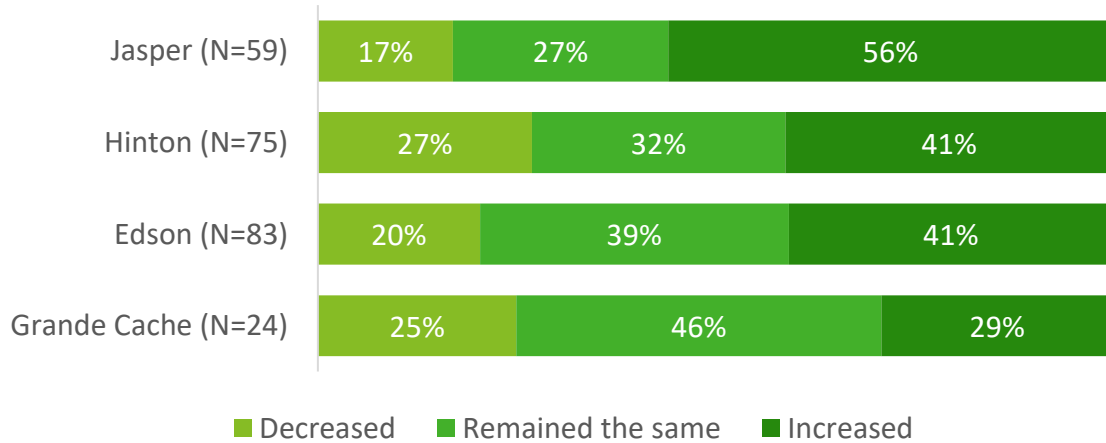


Business Performance

Over the past 12 months have your revenues at your businesses... (Full Region, N=241)



■ Decreased ■ Remained the same ■ Increased

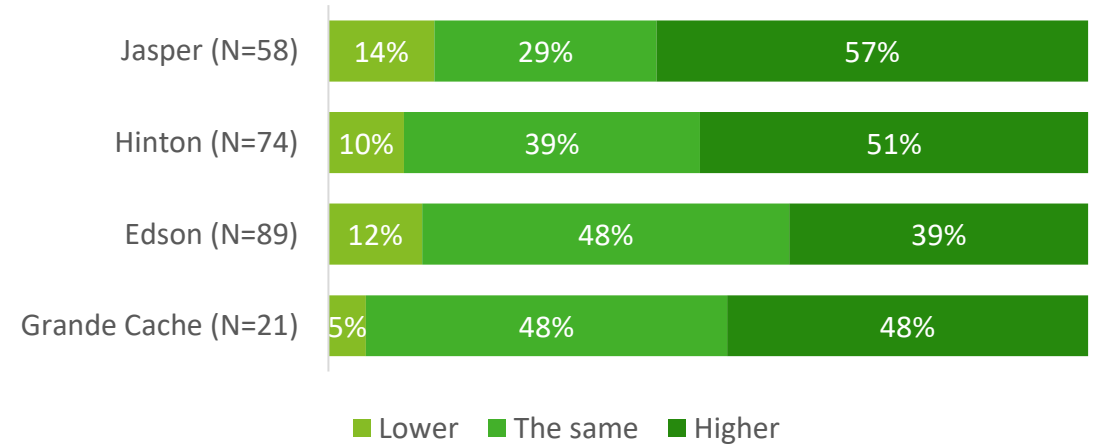


■ Decreased ■ Remained the same ■ Increased

And what are your expectations for the next 12 months in total revenues compared to last 12 months? (Full Region, N=242)



■ Lower ■ The same ■ Higher



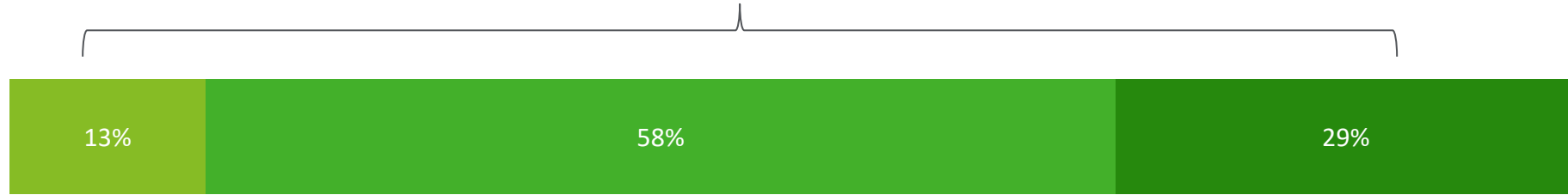
■ Lower ■ The same ■ Higher

Business Performance

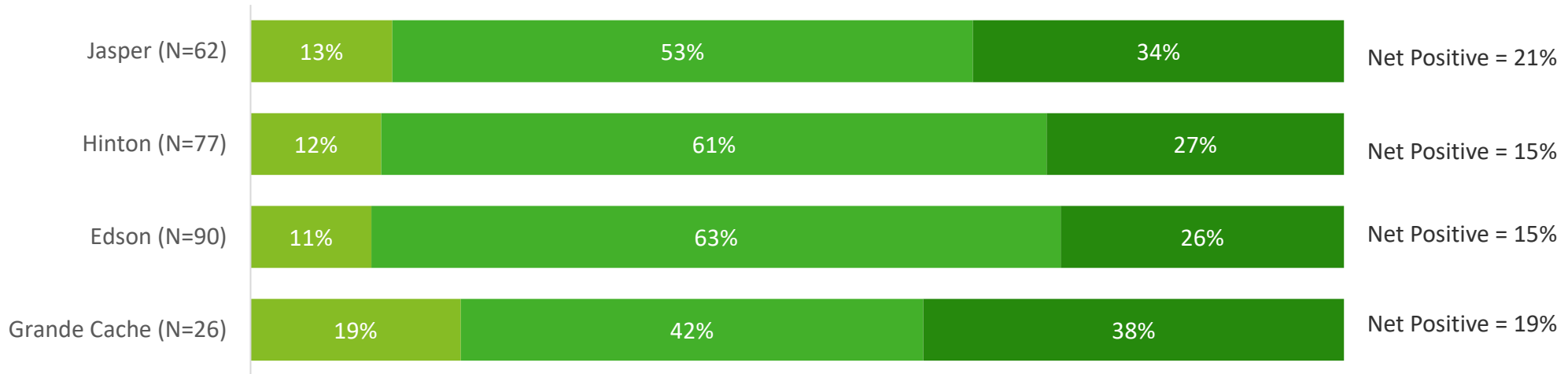


Over the past 12 months would you say your attitude about doing business in the Municipality is... (Full Region, N=255)

Net Positive = 16%

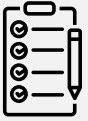


More negative The same and has not changed More positive

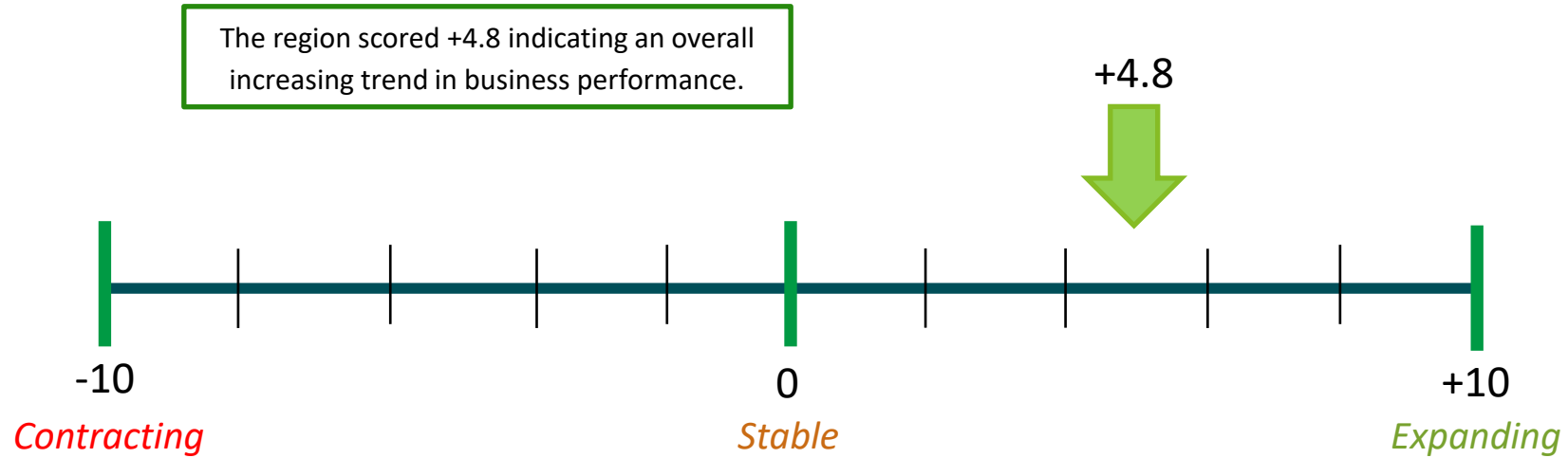


More negative The same and has not changed More positive

Business Performance



The Business Performance Forecast is a metric created by combining the five business performance questions. It considers the changes in staff, revenue and attitudes among businesses in the region for an overall directional picture of the business climate in the area.



	Jasper	Hinton	Edson	Grande Cache
Business Performance Forecast Score	+5.2	+4.6	+4.7	+4.4

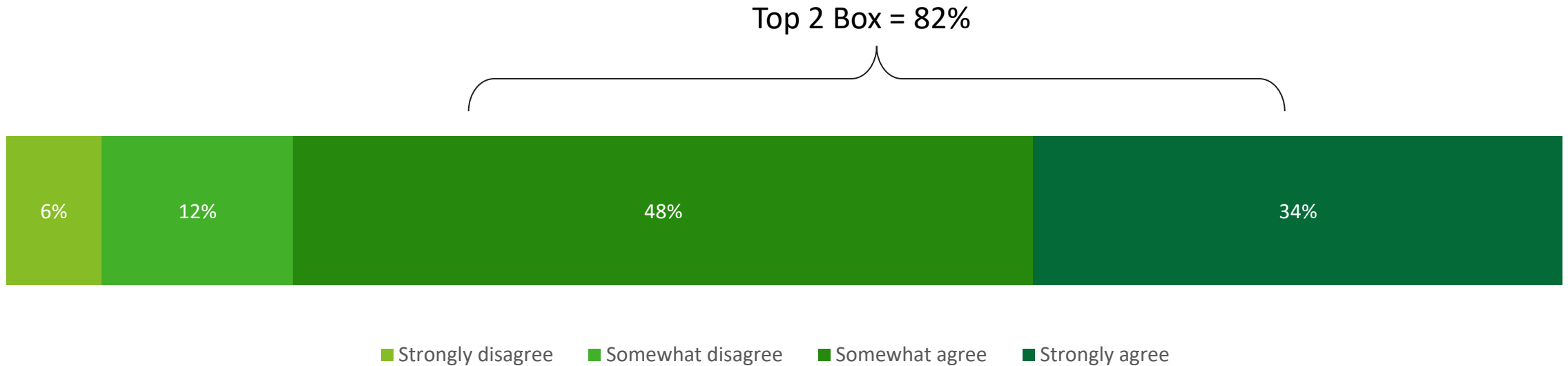


Net Promoter Score

Community Recommendation

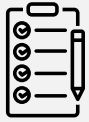


Please rate the level to which you agree or disagree with the following statement: I would recommend this Municipality to another business looking to expand or relocate. (Full Region, N=244)



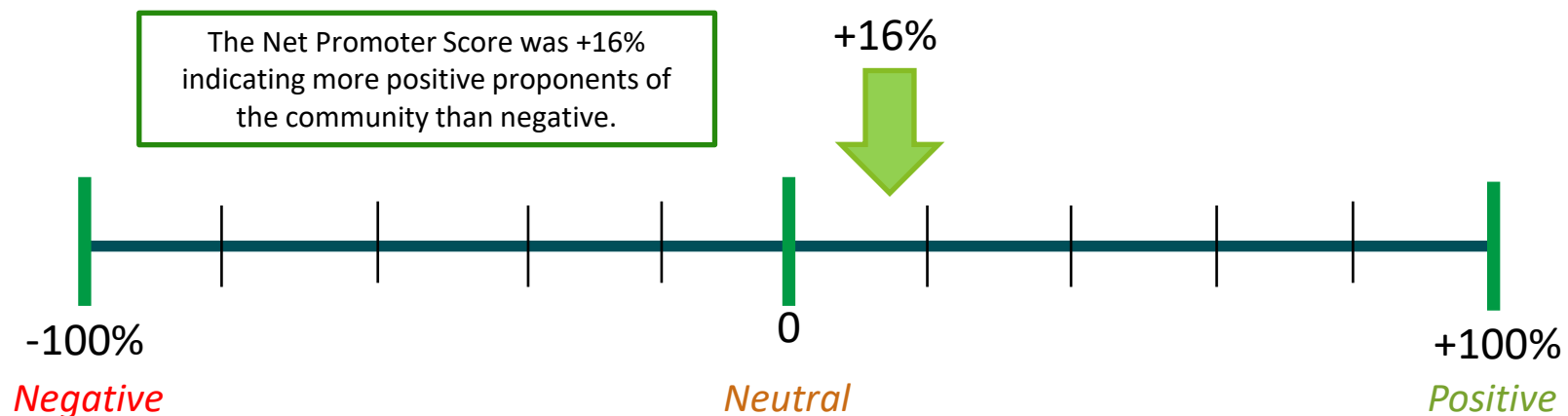
	Jasper (N=57)	Hinton (N=75)	Edson (N=87)	Grande Cache (N= 25)
Top 2 Box	75%	78%	88%	84%

Net Promoter Score

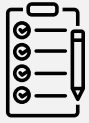


Net Promoter Score: Based on response to the following statement – “I would recommend this region to another business looking to expand or relocate.” (Full Region, N=244)

Group	Definition	Response to question	Percentage
Promoters	Active proponents of the community	Strongly Agree	34%
Passives	Neutral businesses	Somewhat Agree	48%
Detractors	Businesses with a negative opinion that may harm branding efforts	Somewhat Disagree or Strongly Disagree	18%



Net Promoter Score



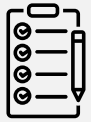
Net Promoter Score: Based on response to the following statement – “I would recommend this region to another business looking to expand or relocate.”

Group	Definition	Response to question	Jasper (N=57)	Hinton (N=75)	Edson (N=80)	Grande Cache (N=25)
Promoters	Active proponents of the community	Strongly Agree	26%	29%	40%	44%
Passives	Neutral businesses	Somewhat Agree	49%	48%	48%	40%
Detractors	Businesses with a negative opinion that may harm branding efforts	Somewhat Disagree or Strongly Disagree	24%	22%	11%	16%
Net Promoter Score	Promoters minus Detractors	-	+2%	+7%	+29%	+28%



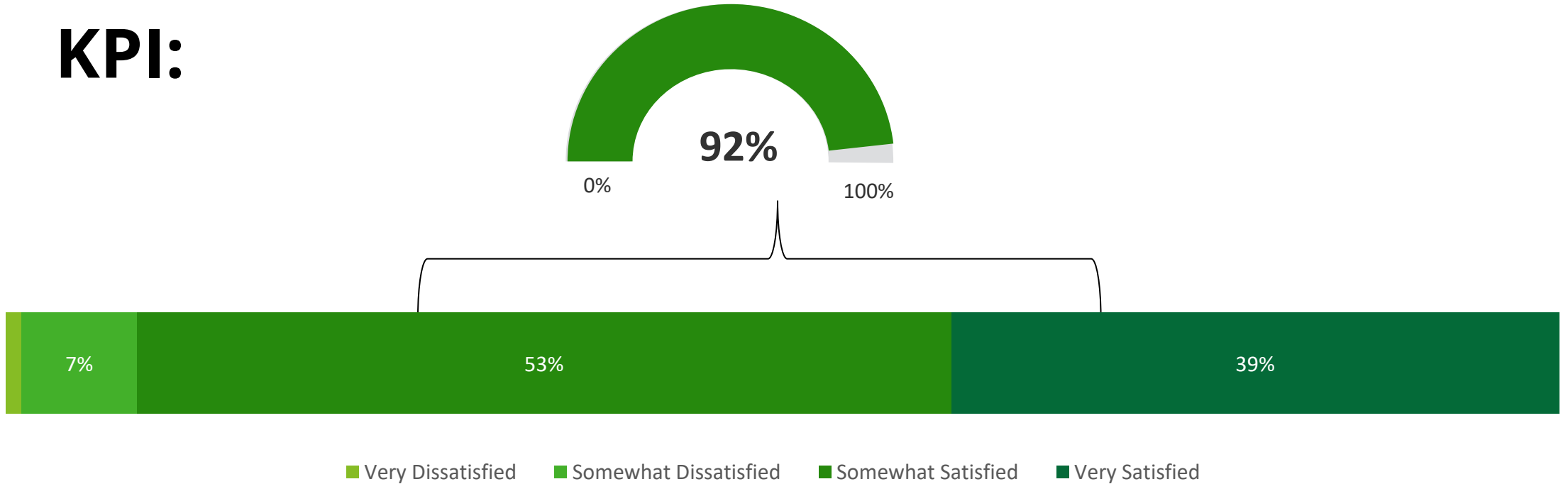
Key Performance Indicator (KPI)

Key Performance Indicator (KPI)



Overall, how satisfied are you with The Municipality as a place to own and operate a business? (Full Region, N=255)

KPI:

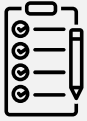


	Jasper (N=62)	Hinton (N=77)	Edson (N=90)	Grande Cache (N=26)
Top 2 Box	90%	92%	93%	89%

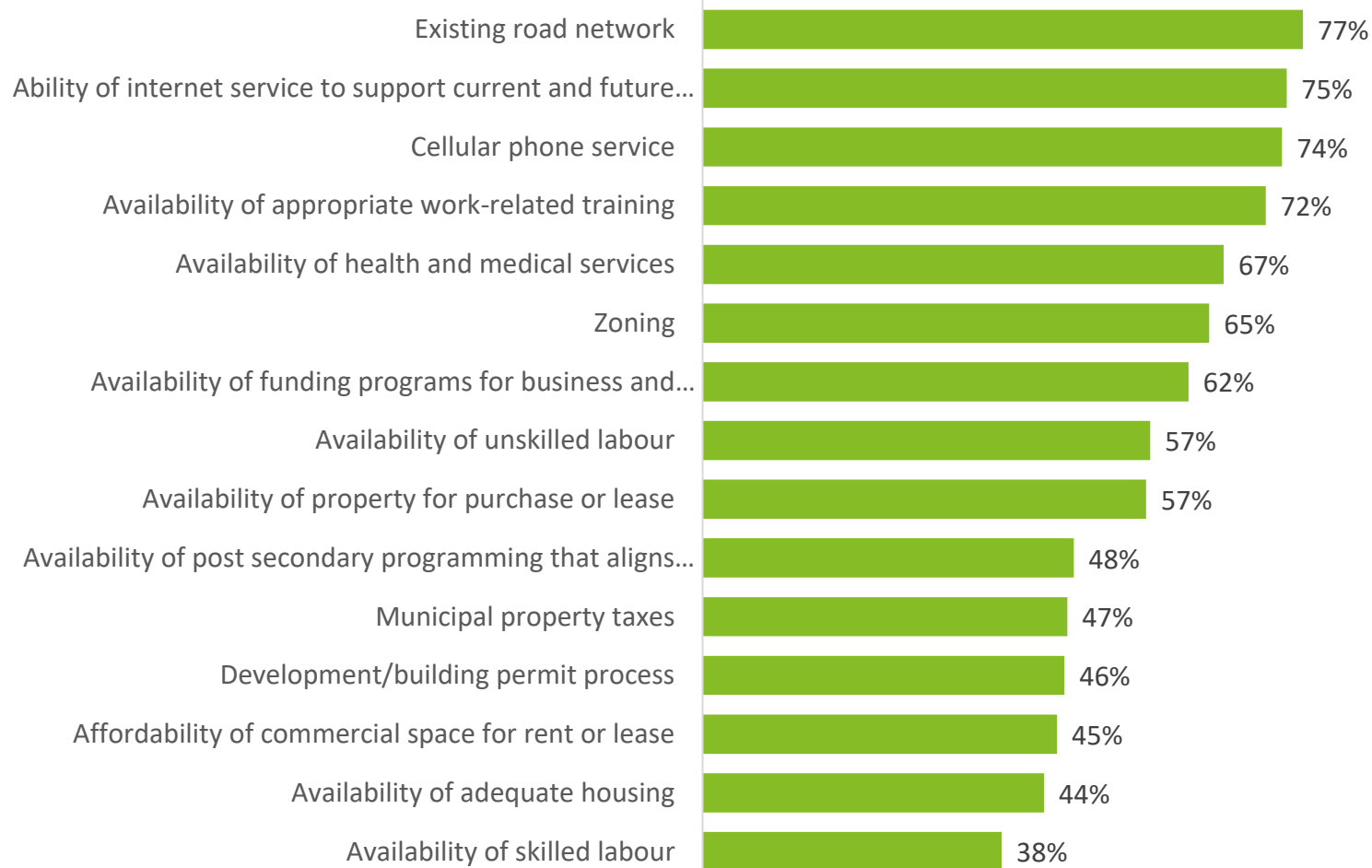


Satisfaction Levels

Satisfaction Levels



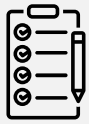
How satisfied you are with each of the following factors of doing business in the Community? (Full Region, N=216)



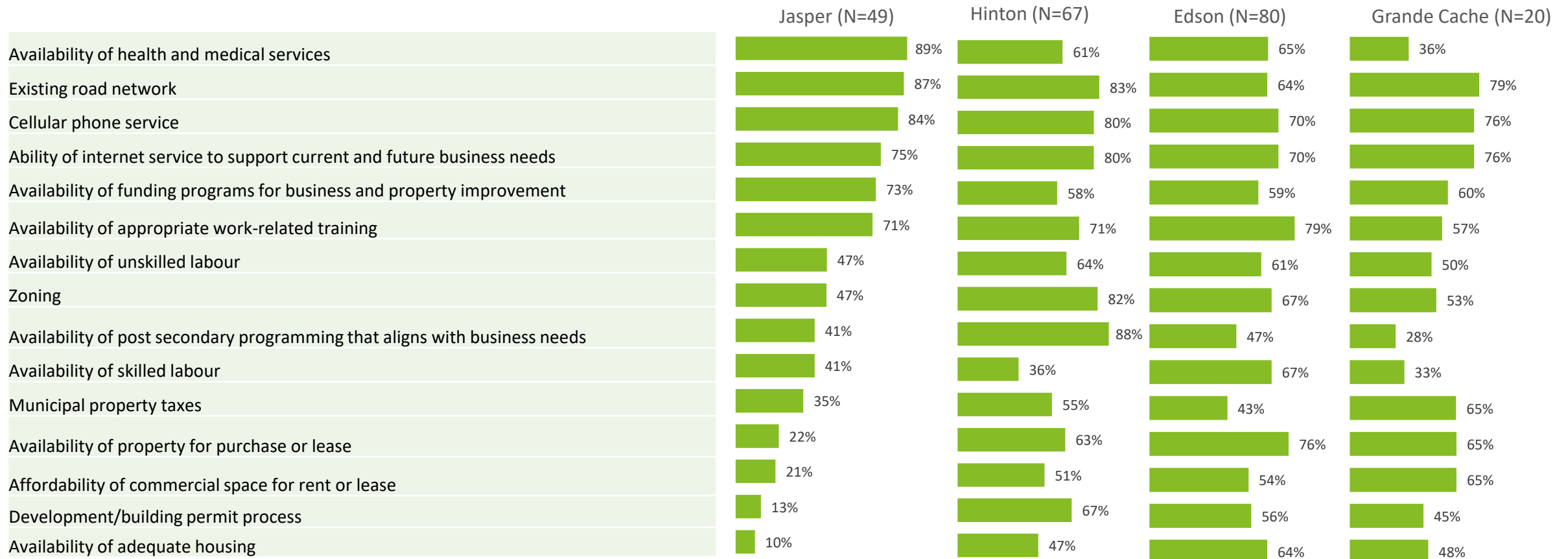
Top two box:
*Very Satisfied &
Somewhat Satisfied
combined.*



Satisfaction Levels



How satisfied you are with each of the following factors of doing business in the Community? (N=280)





Derived Importance & Priority Matrix

Derived Importance & Priority Matrix

Derived Importance

- A statistical calculation of importance
- Far more accurate relative to asking importance
- Calculates the correlation coefficient of business factors with the KPI
- Factors with a high derived importance will have the greatest impact on the KPI

Priority Matrix


- A list of business factors to focus efforts
- Each priority is calculated using the level of satisfaction and the importance of each item (Derived Importance)
- Factors with lower satisfaction scores and higher importance become the top priorities
- Making improvements to the top priorities will have the greatest impact on improving the overall KPI

Example:




Priority Matrix

Factor	Performance	Importance	Priority Rank
Availability of skilled labour	38%	7.4	1
Municipal property taxes	47%	8.3	2
Development/building permit process	46%	7.9	3
Affordability of commercial space for rent or lease	45%	7.7	4
Availability of adequate housing	44%	6.5	5
Availability of post secondary programming that aligns with business needs	48%	7.0	6
Availability of funding programs for business and property improvement	62%	8.8	7
Availability of property for purchase or lease	57%	7.3	8
Zoning	65%	7.9	9
Availability of unskilled labour	57%	6.1	10
Availability of appropriate work-related training	72%	8.0	11
Availability of health and medical services	67%	6.4	12
Ability of internet service to support current and future business needs	75%	7.1	13
Cellular phone service	74%	6.7	14
Existing road network	77%	7.3	15



Higher Priority



Lower Priority

Priority Matrix

Jasper

Factor	Priority Rank
Availability of adequate housing	1
Development/building permit process	2
Municipal property taxes	3
Affordability of commercial space for rent or lease	4
Availability of skilled labour	5
Availability of property for purchase or lease	6

Hinton

Factor	Priority Rank
Availability of post secondary programming that aligns with business needs	1
Availability of skilled labour	2
Municipal property taxes	3
Availability of adequate housing	4
Affordability of commercial space for rent or lease	5
Availability of funding programs for business and property improvement	6

Edson

Factor	Priority Rank
Municipal property taxes	1
Availability of funding programs for business and property improvement	2
Development/building permit process	3
Affordability of commercial space for rent or lease	4
Availability of skilled labour	5
Zoning	6

Grande Cache

Factor	Priority Rank
Availability of health and medical services	1
Availability of post secondary programming that aligns with business needs	2
Availability of appropriate work-related training	3
Development/building permit process	4
Availability of skilled labour	5
Availability of adequate housing	6



Business Community Health Index

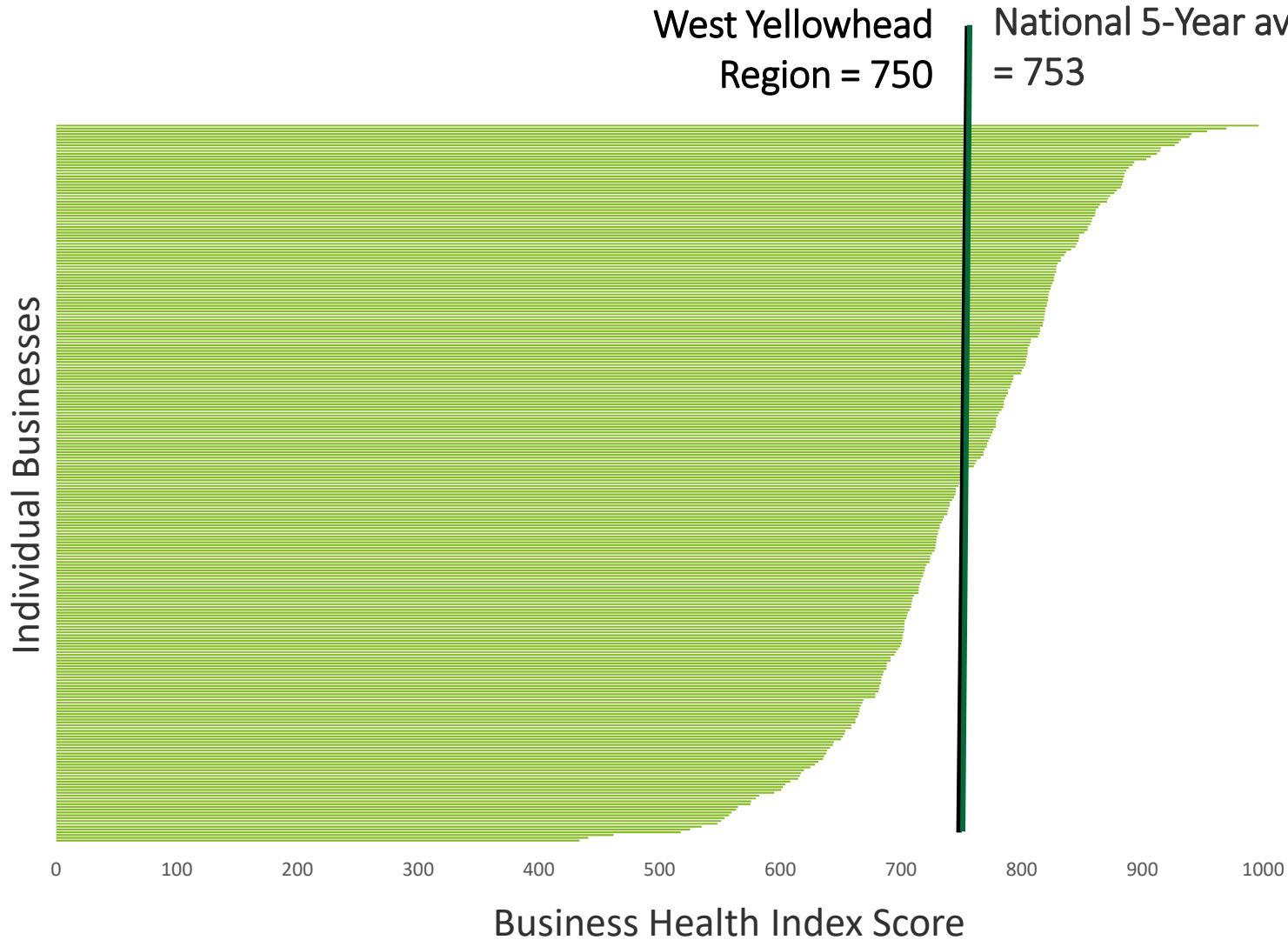
Community Business Health Index



Using the results of this business survey, Deloitte combines the questions into a proprietary Community Business Health Index which is the combination of the following nine sub-scores:



Community Business Health Index



The region scored well on the Community Business Health Index. This index is based on several factors:

- The region outperformed the national average on businesses' ratings of many of the Business Health Index sub-scores, including: historical revenue changes and changes in business attitudes.
- Some indicators that were rated relatively lower in the region compared to the national average included Workforce Attraction and Retention measures and Business Policies, Supports and Incentives.

Future Plans – Next 24 months



Businesses with plans to expand:

- **39** businesses total
- **8** within next 6 months
- **31** in more than 6 months

Plans to downsize:

- **7** businesses total
- **2** within next 6 months
- **5** in more than 6 months

Plans to relocate:

- **4** business total
- **4** in more than 6 months

Plans to close:

- **7** business total
- **4** within next 6 months
- **3** in more than 6 months

Plans to sell:

- **9** business total
- **5** within next 6 months
- **4** in more than 6 months

Triage Flag Results

Throughout the survey process Triage cases that represented green or red flags were tracked. Out of the 255 businesses surveyed, 78 businesses presented an opportunity for intervention.



= Businesses considering expanding in the next 2 years.

= 39 businesses.



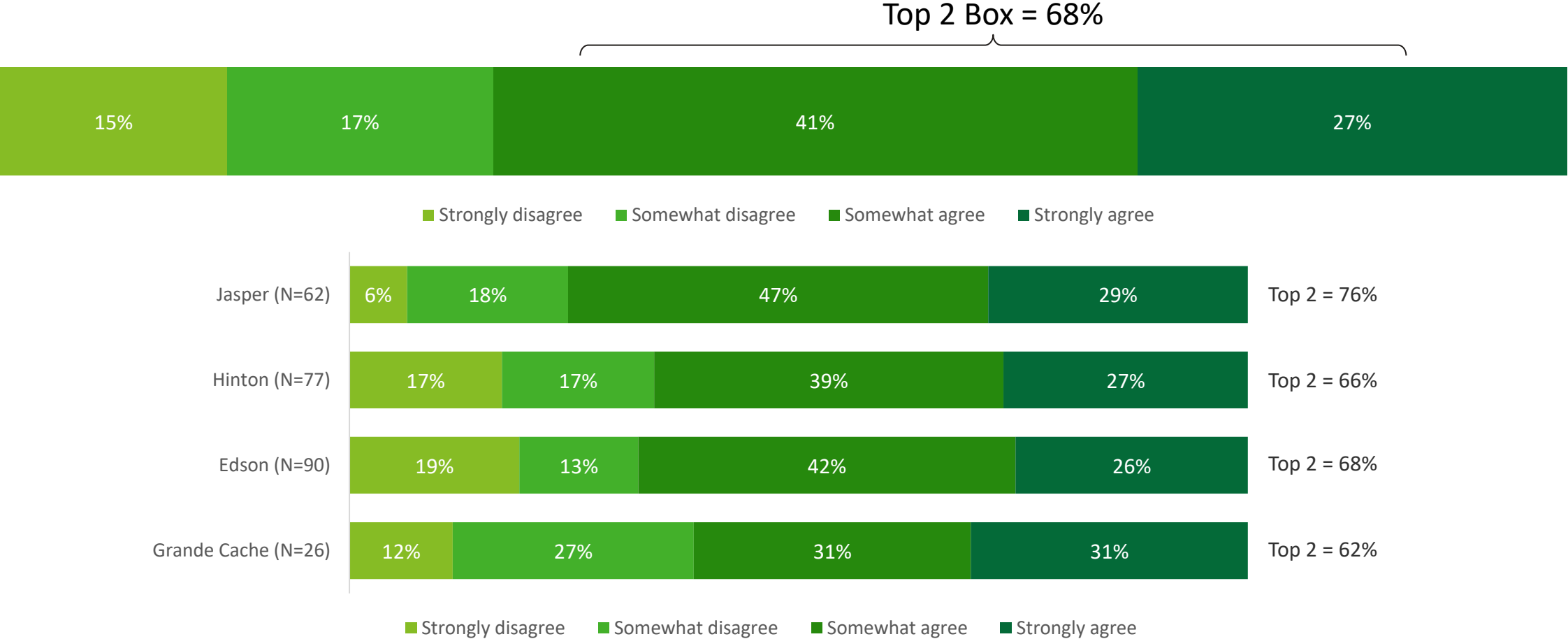
= Businesses considering relocating, downsizing, selling, closing, or businesses with leases that expire in less than a year. = 39 businesses



Businesses Communications



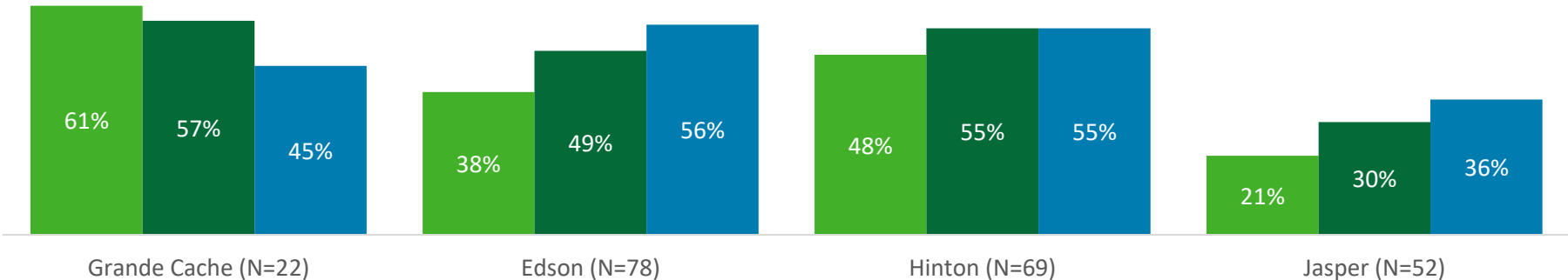
Please indicate the level to which you agree or disagree with the following statement: I know who I need to talk to at the **region** if I have a problem with my business or a business concern I'd like to share. (All regions, N=255)



Businesses Communications



Please indicate the level to which you agree or disagree with each of the following statements related to labour force access (All regions, N=221).



- My business faces high staff turnover due to increased competition for employees
- I am unable to hire and retain employees as they are leaving the profession for other sectors.
- Current worker expectations around benefits and wages affect my ability to maintain staff.

Contact

Chris Bandak

Managing Director, Economic and Policy Advisory

cbandak@deloitte.ca

+1 (416) 607-6747

Simon Webb

Senior Associate, Economic and Policy Advisory

swebb@deloitte.ca

+1 (613) 299-3776

Tanushri Sawant

Analyst, Economic and Policy Advisory

tasawant@deloitte.ca

+1 (416) 687 1377

Deloitte.





www.deloitte.ca

About Deloitte

Deloitte provides audit and assurance, consulting, financial advisory, risk advisory, tax, and related services to public and private clients spanning multiple industries. Deloitte serves four out of five Fortune Global 500® companies through a globally connected network of member firms in more than 150 countries and territories bringing world-class capabilities, insights, and service to address clients' most complex business challenges. Deloitte LLP, an Ontario limited liability partnership, is the Canadian member firm of Deloitte Touche Tohmatsu Limited. Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee, and its network of member firms, each of which is a legally separate and independent entity. Please see www.deloitte.com/about for a detailed description of the legal structure of Deloitte Touche Tohmatsu Limited and its member firms.

Our global Purpose is making an impact that matters. At Deloitte Canada, that translates into building a better future by accelerating and expanding access to knowledge. We believe we can achieve this Purpose by living our shared values to lead the way, serve with integrity, take care of each other, foster inclusion, and collaborate for measurable impact.

To learn more about how Deloitte's approximately 312,000 professionals, over 12,000 of whom are part of the Canadian firm, please connect with us on LinkedIn, Twitter, Instagram, or Facebook.

© Deloitte LLP and affiliated entities.