

BOYLE, ALBERTA
BUSINESS RETENSION & EXPANSION
SURVEY

Feb 1, 2009
Carpenter, Barr & Associates

ACKNOWLEDGEMENTS

We wish to thank the businessmen and women of Boyle for their time and efforts in compiling this survey and for their very gracious and welcoming assistance in the interview process. As well we would like to thank the staff of the Boyle municipal office for their assistance in finding businesses, handling appointments and generally helping conduct this survey.

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Appendix A – Business Retention & Expansion Survey (full questionnaire)

Executive Summary

Boyle is a northern Alberta community roughly halfway between Edmonton and Fort McMurray but being on highway #63 is neither remote nor isolated. Despite its huge dependence for employment on the forest sector, its business community is thoroughly upbeat, confident, expansion minded, and very successful! Its strengths and weaknesses are those to be expected in a small town in northern Alberta. The ongoing shortage of labour is the primary difficulty. The quality of life of a small town is a primary strength. More services etc. that are desired would come with additional growth.

While many new businesses would be welcomed to the community, the survey identified several specific business needs: a tire shop, a mechanical supply outlet and a taxi service. That any new business would find a general welcome is supported by the overwhelming extent to which current businesses found support from other businesses, the general public, and local government and the degree to which their own businesses are currently prospering. Thus the survey results themselves are very valuable for marketing Boyle as a location for new investment.

The survey involved meeting personally with all business owners both to provide a very complete overview of the business climate in Boyle and to provide them with news of current initiatives by the local governments, in particular the Alberta Energy Corridor project where Boyle is the southern end of an 80 kilometer stretch of highway #63 and contains the bulk of the population. The resulting dialog was of great value to all parties assisting businesses in their planning, providing marketing and planning information to the municipalities, and in generally promoting good will. Discussions went beyond the survey questions themselves and many useful ideas such as specifically engaging the youth in the community who in contrast to their elders, might not regard the quality of life so highly.

Since the bulk of the interviews were conducted prior to the financial market 'meltdown' (but after the US housing market 'meltdown'), we revisited several of the local business people to ask if their optimistic outlook had been substantially dimmed. While concern was indeed expressed about the situation, locally it is seen as easing labour shortages, availability of skilled trades and sub-contractors, particularly in the residential construction sector. The major pipeline projects, the twinning of highway 63 and the announced commercial and residential projects in Boyle already provide the basis for their optimism. The major forest sector companies, while much affected by any shrinkage of export markets, are seen to be 'weathering the storm'.

Survey Methodology

Because Boyle is a small community of about 900 inhabitants, it and the surrounding territory overlap considerably in locations both of businesses and employees. The list of appropriate businesses to survey was set at those businesses with either a Boyle business license or a Boyle address. This worked well by covering the employment of virtually all Boyle citizens but resulted in some confusion between actual residency of both employees and owners. The list contained 66 businesses of which 2 declined to respond, 4 were found to be inactive, 10 could not be found in time and 9 were not fully completed by businesses that could not give time for personal interviews. Thus 42 businesses provided fully useful data. These 42 businesses employed 832 full-time, 97 part-time 622 contract, and 472 seasonal/temporary employees. This apparent anomaly results from the forest sector industries importing labour at peak season and from a larger area than Boyle proper but shows that the bulk of Boyle employment has been accounted for. Indeed the missing businesses could account for only a maximum of 20-30 employees!

The survey was more properly a census since it was attempted to contact and visit personally each and every business. This allowed two-way communication providing the owners with the latest information on municipal activity. It also ensured standard interpretation of questions on the survey and minimized both the difficulties and time required by the business owners in completing the survey.

This methodology itself provided confirmation of the survey results that businesses are prospering. Simply slotting interview times with busy businessmen and women was difficult, demonstrating their commitment to business, the amount of their business, and their need for additional staff. As well several interviews were split into different time slots and some were conducted before and after normal business hours. While it was expected that 1 hour per interview would suffice, in fact half-day sessions were the norm.

At the beginning of the survey (about September 1, 2008) there was no Chamber of Commerce in Boyle having dissolved some time previous. Simply raising the question has helped the local businesses to attempt to restart the Chamber and by December 1, has succeeded in doing so. Once again this set of events demonstrates the business climate in Boyle since the CoC was suspended primarily because the business owners were too busy to participate, but was restarted because they viewed it as being an asset to the community!

Since Boyle is actively planning for, encouraging, and expecting substantial growth in the near future, the survey provides a 'benchmark' for measuring change. As well, because of the very positive business response, the survey is itself a valuable marketing tool. Being a census, it was an instrument for engaging the business community which it is intended to be followed by engaging the community at large in a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) in the coming year.

Current Workforce

The Boyle area workforce is substantially employed in the forestry sector, lumber, pulp & paper, and support to those companies. There are as well several other large employers. The majority of in-town businesses however, are commercial enterprises providing citizen amenities etc. The total number of employees is complicated by the sector drawing its labour from a wide area in the County of Athabasca and the town of Athabasca. The figure for contract labour is also subject to a double counting since some businesses provide 'sub-contract' work to the larger industries. Nonetheless the workforce size is substantial.

Employee Type	Number
Full-time	832
Part-time	97
Contract	622
Seasonal/Temporary	472
Total	2023

From the perspective of the smaller local businesses, area pipeline construction has in past and will in future, create(d) considerable demand. In 2007 a large work-camp in the area generated substantial demand for food, entertainment, and other services. It is expected that another pipeline camp will be set up in 2009 and a third in 2010.

The workforce is relatively young as shown below:

Age	Number
15-20	131
20-24	61
25-44	614
45-54	282
55-64	92
Total	1180

and has the expected range of education.

Education level	Number
Less than High School graduation	182
High School graduation and some post-secondary	966
Trades Certificate or diploma	404
College Certificate or diploma	62
University Certificate, diploma or degree	111
Total	1725

Again as expected, the complication of seasonal and contract employees leads to differing totals and thus only the distributions should be considered.

How The Business Community Perceives Boyle

We considered the perception of Boyle in several senses. First was the physical aspect of the community. More than 97% of businesses were somewhat or completely satisfied with the location of their establishments. Boyle has effectively one main street and it is always a busy focal point for the community. Informal complaints were mainly about the physical condition of the buildings only.

How satisfied are you with the current site of this business in this community?		
Answer Options	Response Percent	Response Count
Completely satisfied	70.0%	28
Somewhat satisfied	27.5%	11
Not very satisfied	2.5%	1
Not at all satisfied	0.0%	0
<i>answered question</i>		40

One broad question asked whether or not a range of items were advantages or disadvantages to doing business in Boyle. The strong indication of the 'small town' advantages is shown by 4 specific topics:

	Advantage (%)	Disadvantage (%)	No Difference (%)	N/A (%)	Response Count
Quality of life	85	8	8	0	39
Support from municipality	74	5	13	8	39
Support from local business	87	3	5	5	39
Support from local residents	95	0	5	0	39

These are very high percentages and show the strength of the community both the business community and the community at large.

From the same question, the main disadvantage in Boyle was the same as could be expected for any community in northern Alberta:

	Advantage (%)	Disadvantage (%)	No Difference (%)	N/A (%)	Response Count
Availability of skilled labour	3	85	10	3	39

[the full question is contained in Question #36 in the appendix; no other items were as dramatically 1-sided]

The overall opinion of doing business in Boyle is further demonstrated by:

In the past 2 years has your attitude about doing business in this community changed?		
Answer Options	Response Percent	Response Count
Yes	23.7%	9
No	76.3%	29
<i>answered question</i>		38

If yes, is your attitude now more positive?		
Answer Options	Response Percent	Response Count
Yes	83.3%	10
No	8.3%	1
Mixed	8.3%	1
<i>answered question</i>		12

Current Business Success

The following 2 questions give the most succinct explanation of local optimism:

During the past two years, would you say that your total dollar sales at this location have increased or decreased?		
Answer Options	Response Percent	Response Count
Increased	80.0%	32
Decreased	7.5%	3
Uneven sales pattern	2.5%	1
Same/no significant change	10.0%	4
<i>answered question</i>		40

What are your expectations for next year's total dollar sales compared to last year? Will they be...		
Answer Options	Response Percent	Response Count
Higher	67.5%	27
Lower	0.0%	0
Same	32.5%	13
Not sure	0.0%	0
<i>answered question</i>		40
<i>skipped question</i>		1

and the expected consequence on the labour market is shown by the following:

Over the next 2 years, do you think the number of employees in this business will increase, decrease or stay the same?			
Answer Options	Yes	No	Response Count
Increase	19	9	28
Decrease	0	12	12
Stay the same	22	3	25
The number of staff you expect to gain or lose			11
<i>answered question</i>			40

Current Business Planning

As a logical consequence of sales growth both past and anticipated, we would expect to see Boyle businesses themselves expanding or attempting to expand. A substantial portion do indeed expect to renovate or expand.

Have you made any capital investments in the past 3 years?		
Answer Options	Response Percent	Response Count
Yes	52.6%	20
No	47.4%	18
<i>answered question</i>		38

Are you planning any capital investment in the next 3 years?		
Answer Options	Response Percent	Response Count
Yes	43.2%	16
No	56.8%	21
<i>answered question</i>		37

Within the next 2 years, do you plan to undertake any major renovations at this site?		
Answer Options	Response Percent	Response Count
Yes	21.1%	8
No	78.9%	30
<i>answered question</i>		38

Within the next 2 years, are you planning to expand your operations in this community?		
Answer Options	Response Percent	Response Count
Yes	29.7%	11
No	70.3%	26
<i>answered question</i>		37

Will your expansion lead to:		
Answer Options	Response Percent	Response Count
An increase in work force	84.6%	11
An increase in floor space	69.2%	9
Additional product lines	46.2%	6
Additional services for customers	46.2%	6
Additional investment in equipment and technology	69.2%	9
Importing goods or services to Canada	15.4%	2
Increase in export of goods or services	0.0%	0
Other (please specify)		0
<i>answered question</i>		13

We asked about these plans with respect to any difficulties they anticipated and of course labour availability ranked high.

Is your business experiencing any difficulties with its expansion plans?		
Answer Options	Response Percent	Response Count
Yes	23.1%	3
No	76.9%	10
<i>answered question</i>		13

What difficulties is your business experiencing with its expansion plans?		
Answer Options	Response Percent	Response Count
Financing	40.0%	2
Local by-laws	0.0%	0
Labour availability	60.0%	3
Land availability	0.0%	0
Labour force training	0.0%	0
Availability of buildings	20.0%	1
Importing of goods and services	0.0%	0
Exporting of goods and services	0.0%	0
General investment services	0.0%	0
Utilities/infrastructure	0.0%	0
Finding/developing strategic alliances	0.0%	0
Marketing	0.0%	0
Other (please specify)		2
<i>answered question</i>		5

Does this business have difficulty recruiting qualified employees for this location?		
Answer Options	Response Percent	Response Count
Yes	67.5%	27
No	32.5%	13
<i>answered question</i>		40

Considering the other major economic input, financing seems not to be of concern. With respect to capital expansion we asked:

How will this be financed?		
Answer Options	Response Percent	Response Count
Cash	68.4%	13
Line of Credit	68.4%	13
New equity	10.5%	2
Don't Know	21.1%	4
Other (please specify)	0.0%	0
<i>answered question</i>		19

And more broadly we asked of all businesses (whether contemplating expansion or not):

Are you able to secure sufficient capital through your financial institution whenever you need it?		
Answer Options	Response Percent	Response Count
Always	63.2%	24
Often	2.6%	1
Sometimes	10.5%	4
Never	5.3%	2
N/A	18.4%	7
<i>answered question</i>		38

Suggested Improvements to Boyle

As we can expect from a small community, the services most desired are those dependant on population.

Are there any suppliers or services that you think would be beneficial to you or your employees living in the community?		
Answer Options	Response Percent	Response Count
Dining	82.5%	33
Entertainment	87.5%	35
Professional	92.5%	37
Retail	82.5%	33
Financial	50.0%	20
	Other (please specify)	2
<i>answered question</i>		40

In a broader sense, we asked about barriers to growth. We have already addressed the issue of labour availability but the 2nd highest ranking shortfall in Boyle was availability of space for rent or lease.

In your opinion, which of the following factors are barriers to new businesses coming to this community?		
Answer Options	Response Percent	Response Count
Lack of water/wastewater capacity	2.9%	1
Lack of serviced land	14.7%	5
Resistance from local business	11.8%	4
Lack of proactive new business recruitment	0.0%	0
Availability of properly zoned and designated land	8.8%	3
Slow approval process	5.9%	2
Availability and variety of different sized parcels of land	11.8%	4
Development charges	2.9%	1
High taxes	5.9%	2
Inadequate labour supply	88.2%	30
Inadequate transportation	5.9%	2
Availability of space for rent or lease	52.9%	18
	Other	2
<i>answered question</i>		34

When asked about purchases of goods and services there were many suggestions for local sourcing (see Questions #83, #85 and #86 in the Appendix) but in the interviews it was frequently admitted that these were new businesses that would come with simple growth in Boyle. Where purchases were made outside of Boyle it was simply because the products were not available locally.

Why are products or services NOT being purchased from within the community?		
Answer Options	Response Percent	Response Count
Product not available here	91.9%	34
Unaware of local vendors	0.0%	0
Higher costs locally	8.1%	3
No control, head office decision	8.1%	3
Quality of available products	0.0%	0
Long term contract with outside supplier	0.0%	0
Not applicable to our business	0.0%	0
	Other (please specify)	0
<i>answered question</i>		37

From the questions on new businesses for Boyle, besides trades in general, it appears that immediately viable opportunities exist for a tire shop, a supplier of mechanical supplies, a taxi service (local and for work camps) and equipment rentals. The conclusion of viability comes from the interview observations as to the extent of current outside purchases.

The survey asked extensive questions on the subject of training both for staff and for management. While labour seems to be the greatest shortage in Boyle, (re)training did not seem to be a major factor. Nonetheless when asked about requirements for employee skills, businesses did identify what they needed in their employees. Of course throughout the entire survey it was oft repeated that the area needed skilled tradesmen if not specifically as employees.

Recognizing that your employees have defined skill sets and that your business may have changing needs in the near or medium term, how important is it that your employees have the following skills?						
Answer Options	Very important	Somewhat important	Not important	Not at all important	N/A	Response Count
Literacy skills	32	6	0	0	0	38
Basic computer skills	15	18	4	0	1	38
Advanced computer skills	4	13	20	0	1	38
Sales skills	20	7	10	0	1	38
Business Management skills	20	11	7	0	0	38
Production management skills	13	4	15	1	5	38
Project management skills	6	11	15	1	5	38
Communication skills	33	5	0	0	0	38
Proficiency in a second language	2	9	24	3	0	38
Community college diploma	2	6	29	1	0	38
Technical trade	5	15	14	2	2	38
University degree	1	5	29	2	1	38
WHMIS training	9	16	11	1	1	38
HACCP training	4	7	17	3	7	38
ISO standards training	3	4	16	2	13	38

Question # 45 in the appendix lists the detailed set of skills or qualifications that businesses found 'lacking' in the local workforce.

Conclusions

The businesses of Boyle demonstrated on several dimensions that they did indeed have positive expectations of success and growth for Boyle and environs. Questions #99, #100, and #101 on strengths, weaknesses and barriers to growth lead to lengthy discussions but could be summarized as the small town being both the main strength and simultaneously the main weakness of Boyle. The pursuit of growth via the Alberta Energy Corridor project held great interest and expectations for the interviewees. Labour shortage was paramount; residential shortage in light of already announced new subdivisions was only of secondary concern. Local governance is perceived as supportive and pro-active (in large part due the AEC project). The current labour force, while insufficient, is highly regarded and the community at large quite supportive.

This survey documents the current status of Boyle in anticipation of the AEC project and in fact covers most of the current business and employment for the physical area covered by the AEC. Hence it provides a 'benchmark' both for Boyle and for the AEC.

APPENDIX A.

BUSINESS RETENTION AND EXPANSION

SURVEY

VILLAGE OF BOYLE, ALBERTA

Question 1. - What is the legal form of this business?		
Corporation	52.5%	21
Sole Proprietorship	30.0%	12
Non-Profit Corporation	2.5%	1
Branch Plant	0.0%	0
Partnership	10.0%	4
Cooperative	2.5%	1
Franchise	0.0%	0
Other (please specify)	2.5%	1

Question 2. - Is this business 100% Canadian-owned?		
Yes	97.5%	39
No	2.5%	1

Question 3. - If this business is not 100% Canadian, what % is foreign-owned?	
Japanese ?%	1

Question 4. - What is the primary business activity for this company?		
Manufacturing - Food and Beverage	0.0%	0
Manufacturing - Textile, Clothing, Leather	0.0%	0
Manufacturing - Wood,Paper, Petroleum, Chemical Mineral	2.5%	1
Manufacturing - Primary, Fabricated Metals	2.5%	1
Manufacturing - Machinery, Equipment, Electronics	0.0%	0
Manufacturing - Furniture and related Products	0.0%	0
Manufacturing - other	5.0%	2
Construction	2.5%	1
Transportation, Warehousing and Storage	2.5%	1
Farming- crop and animal production	0.0%	0
Forestry and Logging	2.5%	1
Support Activities for Agriculture and Forestry	0.0%	0
Mining, Oil and Gas Extraction	0.0%	0
Support Activities for Mining, Oil and Gas Extraction	0.0%	0
Utilities	0.0%	0
Wholesale Trade	0.0%	0
Retail Trade	27.5%	11
Information and Cultural Industries	0.0%	0
Finance and Insurance, Real Estate and Rental Services	10.0%	4
Professional, Scientific and Technical Services	2.5%	1
Management of Businesses, Administrative and Support Services	0.0%	0
Education Services	0.0%	0
Health Care, Social Assistance	0.0%	0
Arts, Entertainment and Recreation	2.5%	1
Accommodation and Food Services	7.5%	3
Other (please specify)	32.5%	13

Question 5. - What are the main products or services provided at this location?	
(various – according to Question 4.)	26

Question 6. - For about how many years has this business been in operation in this community?		
Less than 1 year	2.5%	1
1 to 3 years	15.0%	6
Over 3 years to 10 years	22.5%	9
Over 10 years to 25 years	37.5%	15
Over 25 years to 35 years	15.0%	6
Over 35 years	7.5%	3

Question 7. - Was the business started in this community?		
Yes	80.0%	32
No	20.0%	8

Question 8. - Is this business location the only location?		
Yes	72.5%	29
No	27.5%	11

Question 9. - Is this location the headquarters?		
Yes	74.3%	26
No	25.7%	9

Question 10. - If this location is not the headquarters, where is the headquarters?		
(various – Edm/Winn etc.)		8

Question 11. - How many other locations are there?		
1	18.2%	2
2	0.0%	0
3	27.3%	3
4	9.1%	1
5	9.1%	1
6	0.0%	0
7	0.0%	0
8	0.0%	0
9	0.0%	0
10-20	0.0%	0
21-30	36.4%	4

Question 12. - If there are other locations, where are they?		
This community	0.0%	0
Alberta	63.6%	7
Rest of Canada	36.4%	4
US	9.1%	1

Question 13. - If there are other locations, compare this location with the others on average. This location is:

	Newer	Older	About the same
Infrastructure (Building)	2	2	7
Infrastructure (Equipment)	3	1	7

Question 14. – If there are other locations, compare this location with others on average. This location is:

	Closer	Farther away	About the same
Proximity to transportation corridors	5	2	4
Proximity to suppliers	0	3	8
Proximity to customers	1	3	7
Proximity to training facilities	1	1	9

Question 15. - If there are other locations, compare this location with the others on average. This location is:

Larger	27.3%	3
Smaller	27.3%	3
About the same	45.5%	5

Question 16. How satisfied are you with the current site of this business in this community?

Completely satisfied	70.0%	28
Somewhat satisfied	27.5%	11
Not very satisfied	2.5%	1
Not at all satisfied	0.0%	0

Question 17. - If you are dissatisfied, why? Check all appropriate boxes.		
Site is too small	33.3%	3
Site is too large	0.0%	0
Inadequate utilities/energy, that is the type, level or quantity available	0.0%	0
Location is inconvenient for customers	11.1%	1
Lack of access to research and development facilities in the area	0.0%	0
Difficulty getting labour or employees	66.7%	6
Building is in a poor state of repair	22.2%	2
Transportation	11.1%	1
High property taxes on site	11.1%	1
Poor community business support	0.0%	0
Age of building	22.2%	2
General appearance of site	0.0%	0
Location is inconvenient of employees	0.0%	0
Employee skill level available locally	0.0%	0
Distance from transportation routes	0.0%	0
Policing/security	0.0%	0
Other (please specify)	22.2%	2

Question 18. - Does the owner of this business own or lease this facility?		
Own	72.5%	29
Lease	27.5%	11

Question 19. - If the facility is leased, when does the lease expire?		
This calendar year	20.0%	2
Next year	10.0%	1
In 2 to 3 years	30.0%	3
Over 3 years from now	40.0%	4

Question 20. - If you are renewing a lease, do you anticipate any problems in renewing the lease?		
Yes	0.0%	0
No	100.0%	10

Question 21. - How many employees work at this location?		
0-4	45.0%	18
5-9	27.5%	11
10-14	5.0%	2
15-19	0.0%	0
20-29	5.0%	2
30-49	2.5%	1
50-99	7.5%	3
100-299	5.0%	2
300 or more	2.5%	1

Question 22. - How many employees fit into each of the following categories?			
	Response Average	Response Total	Response Count
Full-time	24.5	832	34
Part-time	4.2	97	23
Contract	311.0	622	2
Seasonal/Temporary	47.2	472	10

Question 23. - How many employees are:			
	Response Average	Response Total	Response Count
Unionized	3.0	3	1
Non-unionized	28.9	924	32
Management	3.4	118	35

Question 24. - How many staff are represented in each age category?			
	Response Average	Response Total	Response Count
15-29	7.71	131	17
20-24	6.78	61	9
25-44	23.62	614	26
45-54	10.44	282	27
55-64	6.13	92	15

Question 25. - What is the highest level of schooling achieved by your employees (in percentage terms)?			
	Response Average	Response Total	Response Count
Less than High School graduation	15.17	182	12
High School graduation and some post-secondary	29.27	966	33
Trades Certificate or diploma	26.93	404	15
College Certificate or diploma	6.89	62	9
University Certificate, diploma or degree	12.33	111	9

Question 26. - Have any staff been laid off from this location?		
Yes	7.7%	3
No	92.3%	36

Question 27. - If yes, how many in each timeframe?			
	Response Average	Response Total	Response Count
Under 1 year	1.00	2	2
1-3 years	0.00	0	0
4-5 years	0.00	0	0

Question 28. - Which of the following factors has affected the number of employees who have been laid off, received termination notices, severance packages, early retirement? (Check all appropriate boxes)		
	Response Frequency	Response Count
Technological changes in your business	33.3%	1
Change in competition	0.0%	0
Management effectiveness	0.0%	0
Corporate decision or policies	33.3%	1
Less subcontracting	33.3%	1
Decrease in sales	0.0%	0
Decrease in market share	0.0%	0
Other (please specify)	0.0%	0

Question 29. - Have any staff been added at this location?		
Yes	30.6%	11
No	69.4%	25

Question 30. - If yes, how many in each timeframe?			
Under 1 year	13.67	82	6
1-3 years	1.50	6	4
3-5 years	0.00	0	0

Question 31. - Which of the following factors has affected the number of employees who have been hired? (Check all appropriate boxes)		
Technological changes in your business	13.3%	2
Increase or decrease in competition	0.0%	0
Management effectiveness	6.7%	1
Corporate decision or policies	6.7%	1
More or less subcontracting	0.0%	0
Renovation or expansion	6.7%	1
Increase in sales	60.0%	9
New products or services introduced	20.0%	3
Entered new market	0.0%	0
Increase in market share	6.7%	1
Other (please specify)	20.0%	3

Question 32. - Does this location run in shifts?		
Yes	19.4%	7
No	80.6%	29

Question 33. - If yes, what is the shift structure? Check all that apply.		
Days only	25.0%	2
Days/Afternoon	25.0%	2
Days/Aft/Eve	50.0%	4
5 day week	0.0%	0
7 day week	12.5%	1
Weekend shifts	25.0%	2
Continental shift	0.0%	0

Question 34. - Is the owner involved in the day-to-day operations?		
Yes	80.0%	32
No	20.0%	8

Question 35. - Is the owner a resident of the community?		
Yes	57.5%	23
No	42.5%	17

Question 36. - There are advantages and disadvantages to doing business in any area. We would like you to consider each of the following issues and tell us whether you would consider the current situation to be an advantage or a disadvantage to doing business in this area.					
	Advantage	Disadvantage	No Difference	N/A	Response Count
Availability of skilled labour	1	33	4	1	39
Labour costs	0	16	22	1	39
Transportation costs	1	20	17	1	39
Availability of transportation	3	3	30	3	39
Availability of appropriately zoned land	6	3	21	9	39
Land costs	19	4	14	2	39
Cost of construction	0	13	21	5	39
Cost of leasing space	8	5	14	12	39
Local permit process	13	3	16	7	39
Utilities available	22	0	17	0	39
Access to markets/customers/clients	17	5	15	2	39
Access to supplies required	7	8	24	0	39
Municipal taxes	11	4	23	1	39
Quality of life	33	3	3	0	39
Water and sewer capacity	26	0	12	1	39
Development charges	8	1	15	15	39
Support from municipality	29	2	5	3	39
Support from local business	34	1	2	2	39
Support from local residents	37	0	2	0	39
Municipal by-laws	9	0	28	2	39
Telecommunication infrastructure	22	5	10	1	38
Size of local market	10	16	12	0	38
Access to research and development	1	13	10	15	39
Access to training facilities	3	16	15	5	39

Question 37. - Where is the main financial institution for this business located?		
In the community	60.5%	23
Outside of this community	39.5%	15

Question 38. - Are you able to secure sufficient capital through your financial institution whenever you need it?		
Always	63.2%	24
Often	2.6%	1
Sometimes	10.5%	4
Never	5.3%	2
N/A	18.4%	7

Question 39. - Have you investigated alternative sources of funding for the business? This could be through private investors, business development corporation, venture capitalists, etc.		
Yes	15.8%	6
No	84.2%	32

Question 40. - Have you ever used any of these alternative sources of funding?		
Yes	12.1%	4
No	87.9%	29

Question 41. - Have you made any capital investments in the past 3 years?		
Yes	52.6%	20
No	47.4%	18

Question 42. - Are you planning any capital investment in the next 3 years?		
Yes	43.2%	16
No	56.8%	21

Question 43. - How will this be financed?		
Cash	68.4%	13
Line of Credit	68.4%	13
New equity	10.5%	2
Don't Know	21.1%	4
Other (please specify)	0.0%	0

Question 44. - Recognizing that your employees have defined skill sets and that your business may have changing needs in the near or medium term, how important is it that your employees have the following skills?

	Very important	Somewhat important	Not important	Not at all important	N/A	
Literacy skills	32	6	0	0	0	38
Basic computer skills	15	18	4	0	1	38
Advanced computer skills	4	13	20	0	1	38
Sales skills	20	7	10	0	1	38
Business Management skills	20	11	7	0	0	38
Production management skills	13	4	15	1	5	38
Project management skills	6	11	15	1	5	38
Communication skills	33	5	0	0	0	38
Proficiency in a second language	2	9	24	3	0	38
Community college diploma	2	6	29	1	0	38
Technical trade	5	15	14	2	2	38
University degree	1	5	29	2	1	38
WHMIS training	9	16	11	1	1	38
HACCP training	4	7	17	3	7	38
ISO standards training	3	4	16	2	13	38

Question 45. - What skills or qualifications if any do you find lacking in the local workforce?					
#	1	2	3	4	5
1.	Work ethic	Skilled labour	machinists	Forestry tech	Gen'l Maint
2.	skilled trades	Welders	Physiotherapy	dentists	
3.	trades	Dentists	Product knowledge		
4.	drive & ambition	Writing skills	Accountants		
5.	drive	Customer service	Electrician		
6.	comprehension english language	Trades	Office personnel		
7.	ambition/drive	Attitudes			
8.	general trades	Vet medical receptionist			
9.	trades	Profession			
10.	people skills	Skilled labour			
11.	power engineer	Equipment operator			
12.	skilled labour	Heavy equip operator			
13.	motivation	expectations			
14.	people				
15.	animal health technologist				
16.	just people				
17.	trades				
18.	computer				
19.	all trades				
20.	all trades				
21.	trades				
22.	ambition				
23.	trades				
24.	mechanics				
25.	mechanics				
26.	service sector skills				
27.	trades				
28.	ethics				
29.	oil field experience				

Question 46. - Does this business have difficulty keeping employees?		
Yes	18.9%	7
No	81.1%	30

Question 47. - Does this business have problems with absenteeism?		
Yes	2.8%	1
No	97.2%	35

Question 48. - About what percentage of your employees live:			
	Response Average	Response Total	Response Count
Within the local community	54.94	1923	35
In the county/region	60.42	1571	26
Outside the county/region	33.11	298	9

Question 49. - Over the next 2 years, do you think the number of employees in this business will increase, decrease or stay the same?			
	Yes	No	Response Count
Increase	19	9	28
Decrease	0	12	12
Stay the same	22	3	25

Question 50. - Have you conducted a formal training needs analysis in your organization where you assessed the future training requirements for each position?		
Answer Options	Response Frequency	Response Count
Yes	28.9%	11
No	71.1%	27

Question 51. - On average about how many hours of training does each employee at this location receive per year?		
0	5.1%	2
1-10	15.4%	6
11-20	15.4%	6
21-30	7.7%	3
31+	56.4%	22

Question 52. - Do you feel that most of the training provided to your employees has achieved its goals?		
Yes	94.6%	35
No	5.4%	2

Question 53. - Does this business have difficulty recruiting qualified employees for this location?		
Yes	67.5%	27
No	32.5%	13

Question 54. - Do you have emergency plans in place to address?			
	Yes	No	
Chemical spills	17	23	40
Power outages	16	24	40
Flooding and other natural disasters	12	28	40
Personal injury	24	16	40
Terrorist attacks	5	35	40

Question 55. – Do any of the following additional technologies and applications play a role in your business operations and if so, to what extent?						
	Very important	Somewhat important	Not very important	Not at all important	NA	
Energy management	8	11	12	4	4	39
Waste management	12	6	12	6	3	39
GIS mapping	6	0	14	11	8	39
Production management skills	5	8	9	10	7	39
Biotechnology skills	0	3	14	11	11	39
Global Positioning System	4	4	11	11	8	38

Question 56. - Do any of the following business/organizational planning processes play a role in your business operations and if so, to what extent?						
	Very important	Somewhat important	Not very important	Not at all important	NA	
Business management skills	22	17	1	0	0	40
Business planning	18	19	3	0	0	40
Management Standards (ISO, HACCP, WHMIS, etc.)	9	5	10	8	6	38

Question 57. - Which of the following business associations does your business participate in?			
	Yes	No	
Chamber of Commerce	5	35	40
Trade Association specific to your industry	20	19	39
Union based associations	1	38	39

Question 58. - How much of your budget do you use for advertising and promotion (in % terms)?		
0	17.9%	7
1	43.6%	17
2	17.9%	7
3-5	17.9%	7
6-8	2.6%	1

Question 59. - Where do you spend most of your advertising and promotion budget?		
Local	68.6%	24
Rest of Alberta	22.9%	8
Rest of Canada	8.6%	3
USA	0.0%	0
International	0.0%	0

Question 60. - Which of the following techniques do you use to promote your business in your area?		
Trade shows	22.9%	8
Brochures	42.9%	15
Maps	8.6%	3
Website	48.6%	17
Advertising- newspaper	82.9%	29
Advertising - trade magazines	22.9%	8

Question 61. - Which of the following techniques do you use to promote your business outside of your area?		
Trade shows	26.9%	7
Brochures	42.3%	11
Maps	11.5%	3
Website	57.7%	15
Advertising- newspaper	84.6%	22
Advertising - trade magazines	23.1%	6

Question 62. - Which of the following techniques do you use when they are provided by your local Chamber of Commerce or your economic development office?		
Trade shows	33.3%	1
Brochures	66.7%	2
Maps	0.0%	0
Website	100.0%	3
Advertising- newspaper	66.7%	2
Advertising - trade magazines	33.3%	1

Question 63. - What other things could the Chamber of Commerce or the Economic Development Office do to promote your business or industry?		
(no suggestions: ie nothing in addition to current activities, this survey, applying for grants for the AEC, etc.)		

Question 64. - Listed below are some organizations and government agencies that you may have accessed in the past. For each of these, please indicate the level of service you have received.						
	Excellent	Good	Fair	Poor	Not accessed	
Local municipal office	11	20	2	1	6	40
Chamber of Commerce	0	1	1	2	36	40
Economic Development Office	2	1	0	2	35	40
Community Futures	1	1	0	2	35	39
Federal Export Development Corp	0	1	0	1	38	40
Federal Industry Trade and Commerce	0	0	1	0	38	39

Question 65. - Would a mentoring program be of value to your business? This would involve meeting and working with those of other local businesses as a way of learning new skills.		
Yes	17.5%	7
No	75.0%	30
Not sure	7.5%	3

Question 66. - In which areas could a mentoring program be of value to your business?		
Business planning	66.7%	8
Marketing	50.0%	6
Financial	58.3%	7
Technical	8.3%	1
Human resources	41.7%	5
Production	25.0%	3
Logistics (distribution)	16.7%	2
Other (please specify)		1

Question 67. - In which areas could a training program for multiple staff be of value to your business?		
Business planning	14.3%	3
Strategic planning	19.0%	4
Project management	9.5%	2
Supervisory skills	57.1%	12
Team building	42.9%	9
Sales	42.9%	9
Customer Relationship management	42.9%	9
Other (please specify)		4

Question 68. - If training programs were to be developed for your business, what would be your preference for the location of training?		
In-house	23.1%	6
Alternate location within the area	76.9%	20

Question 69. - If training programs were to be delivered to your business, what would be your preference for sessions of training?		
1-2 hour slots	41.7%	10
day long	33.3%	8
mornings	16.7%	4
afternoons	8.3%	2

Question 70. - Would your business consider web-based learning programs to address some of your training needs?		
Yes	74.3%	26
No	25.7%	9

Question 71. - How would you identify which staff would receive training?		
All staff	100.0%	25
New staff	12.0%	3

Question 72. - What kind of lead time is required to identify funding for your training plans?		
0-6 months	83.8%	31
less than 1 year	5.4%	2
next calendar year	0.0%	0
next fiscal year	5.4%	2
do not know	5.4%	2

Question 73. - What is the approximate percentage of your business's total dollar sales from each of the following markets?		
Within Canada	100.0%	40
Within the US	5.0%	2
Outside of Canada/US	5.0%	2

Question 74. - What is the approximate percentage of your business's total dollar sales from each of the following markets within Canada?		
Within the local community	87.5%	35
Within Alberta	77.5%	31
Rest of Canada	15.0%	6

Question 75. - To which countries do you export most of your products and services? If to the USA only, which are the specific states?		
US, Japan, Korea, China	100.0%	5

Question 76. - During the past two years, would you say that your total dollar sales at this location have increased or decreased?		
Increased	80.0%	32
Decreased	7.5%	3
Uneven sales pattern	2.5%	1
Same/no significant change	10.0%	4

Question 77. - What are your expectations for next year's total dollar sales compared to last year? Will they be...		
Higher	67.5%	27
Lower	0.0%	0
Same	32.5%	13
Not sure	0.0%	0

Question 78. - How do you identify your customer's needs?		
Customer surveys	16.7%	6
Customer comment cards	5.6%	2
Informal customer contact	80.6%	29
Customer complaints	63.9%	23
Customer database management	16.7%	6
Sales calls	36.1%	13
Trade or industry publications	19.4%	7
Marketing publications	11.1%	4
Electronic communications (internet web page)	16.7%	6
Other (please specify)		2

Question 79. - Does your business import products or services directly?		
Yes	25.6%	10
No	74.4%	29

Question 80. – From which countries do you purchase these products or services?		
Canada, US	100.0%	8
Germany, US Europe	37.5%	3
Norway, Asia	12.5%	1

Question 81. - What products or services do you purchase from those countries?		
Everything; capital/heavy equip; stump grinder; receivers, TV parts; giftware; garage door openers; maintenance & capital equip; cosmetics	100.0%	8
Capital, heavy equip parts; equipment; maintenance services	37.5%	3
OEM parts	12.5%	1

Question 82. - Which of the following best describes where you purchase your products or services?		
Majority purchased within the community	5.3%	2
Majority purchased outside of the community	71.1%	27
Mixed, some within, some outside of the community?	23.7%	9

Question 83 -What products or services, if any, are you purchasing from outside the community for which you would like to have a local supplier?		
#	1.	2.
1.	Computer supplies	Tires x 3
2.	Courier Services	meat
3.	Greggs equivalent	Shop suppliers
4.	office supplies	
5.	produce	
6.	jewellery	
7.	mechanical supplies	
8.	auto parts (trucks)	
9.	diesel	

Question 84. - Why are products or services NOT being purchased from within the community?		
Product not available here	91.9%	34
Unaware of local vendors	0.0%	0
Higher costs locally	8.1%	3
No control, head office decision	8.1%	3
Quality of available products	0.0%	0
Long term contract with outside supplier	0.0%	0
Not applicable to our business	0.0%	0

Question 85 - Which new suppliers of products or services would benefit the business community?

#	1.	2.	3.
1.	tires	Autoparts (trucks)	mechanical
2.	trades	Small appliances	Longer hours for food store
3.	dentists	Trades x 3	Computer
4.	office supplies	Dentists	Dentist
5.	Acklands type	Specialty trades	Commercial
6.	taxi	Plumber	Taxi
7.	trades	Fast food	Shop suppliers
8.	trades	Equipment rental	High tech traders
9.	material and sewing supplies	Professionals	
10.	trades	trades	
11.	tire shop	Tires	
12.	commercial	Parts	
13.	trades	Industrial coatings	
14.	trades		
15.	appliance repair		
16.	trades		
17.	electrician		
18.	bookkeeping		
19.	trades		
20.	trades		
21.	refrigeration etc		
22.	commercial		
23.	trades		
24.	trades		
25.	trades		
26.	commercial		
27.	everything		
28.	trades		
29.	legal		
30.	trades		
31.	trades		
32.	trades		
33.	trades		
34.	mechanics		
35.	nondestructive metal testing		

Question 86 - Which new business(es) or services would you like to see added to this community?

#	1.	2.	3.	4.
1.	tires	mechanical		
2.	tim hortons			
3.	trades			
4.	taxi			
5.	senior's residence	kids entertainment		
6.	doctor			
7.	hotels	restaurants		
8.	taxi			
9.	trades			
10.	trades	dental		
11.	tool and equipment rental			
12.	trades			
13.	tire shop			
14.	commercial			
15.	trades	commercial		
16.	trades			
17.	specialty trade			
18.	trades			
19.	all trades bldg, maint, repair			
20.	trades			
21.	commercial outlets			
22.	trades	fast food	commercial	
23.	trades	equipment rental	taxi	dentist
24.	refrigeration etc			
25.	commercial			
26.	trades	financial	commercial	
27.	trades	financial	commercial	
28.	trades	professionals		
29.	commercial	trades	tire shop	
30.	fuel supplier			
31.	autoparts(trucks)	shop suppliers	tire shop	
32.	legal			
33.	all	dentists		
34.	all	dentists		
35.	trades	dentist	professional	
36.	trades	tires		
37.	mechanics	parts	high tech traders	
38.	mechanical repairs			

Question 87. - How many competitors are there from outside the area that are selling to your market?		
None	25.0%	10
1-3	37.5%	15
4-7	17.5%	7
8-10	2.5%	1
10+	17.5%	7

Question 88. -Where are your competitors based (which country)?		
US	3.0%	1
Mexico	0.0%	0
Canada (outside of Alberta)	9.1%	3
Other locations in Alberta	97.0%	32
Other countries (other than US, Mexico)	3.0%	1

Question 89. - Are you aware of any customers, suppliers or related industries from outside of this area that are not located locally that are looking to relocate their business?		
Yes	0.0%	0
No	100.0%	32

Question 90. - Would you name the business(es) and their product or service?
(none)

Question 91. - Are there any suppliers or services that you think would be beneficial to you or your employees living in the community?		
Dining	82.5%	33
Entertainment	87.5%	35
Professional	92.5%	37
Retail	82.5%	33
Financial	50.0%	20
Other (please specify)		2

Question 92. - In your opinion, which of the following factors are barriers to new businesses coming to this community?		
Lack of water/wastewater capacity	2.9%	1
Lack of serviced land	14.7%	5
Resistance from local business	11.8%	4
Lack of proactive new business recruitment	0.0%	0
Availability of properly zoned and designated land	8.8%	3
Slow approval process	5.9%	2
Availability and variety of different sized parcels of land	11.8%	4
Development charges	2.9%	1
High taxes	5.9%	2
Inadequate labour supply	88.2%	30
Inadequate transportation	5.9%	2
Availability of space for rent or lease	52.9%	18
Other (please specify)		2

Question 93. - As far as you know, does the local community have a strategic economic development plan?		
Yes	97.5%	39
No	0.0%	0
Don't know	2.5%	1

Question 94. - In your opinion, does the local municipality take an adequate role in business and economic development in this community?		
Yes	92.5%	37
No	5.0%	2
Don't know	2.5%	1

Question 95 - What suggestions do you have for ways in which the business community could help with economic development?		
#	1.	2.
1.	restart CoC	
2.	restart CoC	
3.	restart CoC	
4.	Chamber of Commerce	
5.	Chamber of Commerce	Youth work incentive program
6.	Chamber of Commerce	
7.	vision	
8.	Chamber of Commerce	
9.	Chamber of Commerce	
10.	CoC	municipal interface with business community
11.	goodwill	
12.	Chamber of Commerce	
13.	restart CoC	
14.	restart CoC	
15.	Chamber of Commerce	
16.	Chamber of Commerce	
17.	Chamber of Commerce	
18.	Chamber of Commerce	
19.	reinstate Chamber of Commerce	
20.	Restart Chamber of Commerce	

Question 96. - In the past 2 years has your attitude about doing business in this community changed?		
Yes	23.7%	9
No	76.3%	29

Question 97. - If yes, is your attitude now more positive?		
Yes	83.3%	10
No	8.3%	1
Mixed	8.3%	1

Question 99 - What would you consider the community's strengths as a place to do business?			
#	1.	2.	3.
1.	Small town		
2.	Small town		
3.	Small town		
4.	Small town		
5.	Small town		
6.	3 highways	10 lakes	
7.	People know one another		
8.	size of community		
9.	size of community		
10.	size of community		
11.	size of community		
12.	size of community		
13.	size of community		
14.	road access	hub to Fort McMurray	lower taxes compared to Edmonton
15.	size of community		
16.	size of community		
17.	loyalty		
18.	size of community		
19.	close to lakes for leisure	close or crossroads to other amenities & communities	
20.	small town		
21.	small town		
22.	size of community		
23.	size of community		
24.	location		
25.	size of community		
26.	small town ...		
27.	small town		
28.	size of community		
29.	size of community		
30.	size of community		
31.	size of community		
32.	size of community		
33.	size of community		
34.	size of community		
35.	size of community		
36.	size of community		
37.	small town community lifestyle		
38.	size of community		

Question 100 - What would you consider the community's weaknesses as a place to do business?

#	1.	2.
1.	small town ...	
2.	small town ...	
3.	small town ...	
4.	small town	
5.	small town	
6.	lack offices	
7.	size of community	
8.	size of community	
9.	size of community	
10.	size of community	
11.	size of community	
12.	size of community	
13.	too small a base to grow easily	no competition
14.	size of community	
15.	size of community	
16.	age of population	
17.	size of community	
18.	small town	
19.	small town	
20.	supportive customers	supportive municipal govt
21.	size of community	
22.	size of community	
23.	location	housing
24.	size of community	
25.	small town ...	
26.	small town	
27.	size of community	
28.	size of community	
29.	size of community	
30.	size of community	
31.	size of community	
32.	size of community	
33.	size of community	
34.	size of community	
35.	small town community amenities and residences	
36.	size of community	

Question 101. - What barriers to growth of any business, if any, would you say exist in your community?		
#	1.	2.
1.	size of community	
2.	lack of buildings	adequate housing
3.	small town	
4.	north alta	small population
5.	labour force	
6.	size of community	
7.	fast track plan needed	
8.	Labour	

Question 102. - Do you have any plans to relocate this business within the next 2 years?		
Yes	11.4%	4
No	88.6%	31

Question 103. - Where do you plan to relocate this business?		
In this community	75.0%	3
Elsewhere in Alberta	25.0%	1
In another province	0.0%	0
In US	0.0%	0
In Mexico	0.0%	0
Internationally	0.0%	0

Question 104. - Why are you planning to relocate the business outside this community?		
NA		

Question 105. - Has a business case been made to head office to justify your company remaining at this site?		
no	100%	1

Question 106. - What assistance, if any, could help to prevent the relocation of this business?		
Nothing, decision is made	0.0%	0
Finding another appropriate site location	0.0%	0
Financing	0.0%	0
Assistance with the approval process	0.0%	0
Finding and securing adequate labour	100.0%	1
Securing training services for staff	0.0%	0
Accessing appropriate research and development	0.0%	0
Infrastructure upgrades (roads, telecommunication, fibre optics, energy supply, energy type)	0.0%	0

Question 107. - Within the next 2 years, do you plan to undertake any major renovations at this site?		
Yes	21.1%	8
No	78.9%	30

Question 108. - Within the next 2 years, are you planning to expand your operations in this community?		
Yes	29.7%	11
No	70.3%	26

Question 109. - Will your expansion lead to:		
An increase in work force	84.6%	11
An increase in floor space	69.2%	9
Additional product lines	46.2%	6
Additional services for customers	46.2%	6
Additional investment in equipment and technology	69.2%	9
Importing goods or services to Canada	15.4%	2
Increase in export of goods or services	0.0%	0

Question 110. - Is your business experiencing any difficulties with its expansion plans?		
Yes	23.1%	3
No	76.9%	10

Question 111. - What difficulties is your business experiencing with its expansion plans?		
Financing	40.0%	2
Local by-laws	0.0%	0
Labour availability	60.0%	3
Land availability	0.0%	0
Labour force training	0.0%	0
Availability of buildings	20.0%	1
Importing of goods and services	0.0%	0
Exporting of goods and services	0.0%	0
General investment services	0.0%	0
Utilities/infrastructure	0.0%	0
Finding/developing strategic alliances	0.0%	0
Marketing	0.0%	0
Other (please specify)		2

Question 112. - Within the next 2-5 years, do you plan to close this business? That is, shut down this location and not reopen in some other place.		
Yes	0.0%	0
No	100.0%	26

Question 113. - If you are planning on closing your business, when do you plan to do this?		
within 1 year	0.0%	0
1 to 2 years	0.0%	0
2 to 5 years	0.0%	0
6 to 10 years	100.0%	1

Question 114. - Why are you planning on closing your business? Do you want to:		
Retire	80.0%	4
Pass the business on to my children	20.0%	1
Sell the business as a going concern to someone outside of my family	40.0%	2
Sell the property because of value of land and buildings	20.0%	1
Shut the door because you're losing money	0.0%	0

(NB. The discrepancy between #113 and #114 is that the business owners did not have plans to close at any time soon but would like to retire etc. if the opportunity became available)

Question 115. - If you're planning on retiring or selling your business as a going concern, would you interested in receiving information about succession planning?		
Yes	75.0%	6
No	25.0%	2

Question 116. - If you're planning on retiring or selling your business as a going concern, would you allow us to share your contact information with Community Futures Tawatinaw Region as part of a succession planning project that they're working on?		
Yes	85.7%	6
No	14.3%	1

Question 117. - Is there any other assistance that we could provide during this transition?		
NA		

Question 118. - Looking forward to the next 5 years, please tell us how important each of these factors will be in ensuring that this business will remain competitive.						
Answer Options	Very important	Somewhat important	Not very important	Not at all	N/A	Count
New product research and development	6	17	13	1	1	38
New market development - locally and outside the local area	15	18	4	1	0	38
Access to exporting and international markets	1	1	24	10	2	38
Add or change in businesses, products or services	7	21	7	1	2	38
Strategic alliances (joining with other business to provide products/services)	4	15	15	2	2	38
Improving worker productivity	6	11	19	2	0	38
ISO9000/14000 or HACCP management standards	4	3	18	6	6	37
Expansion of company workforce	6	26	3	3	0	38
Workforce skills development	9	21	8	0	0	38
Energy costs	17	10	7	3	1	38
Water/wastewater capacity	10	3	20	4	1	38
Exchange rate for Canadian dollar	5	5	16	10	1	37
Accessing capital	2	16	8	10	1	37
Source and stability of raw materials	1	2	18	12	3	36