

Lethbridge County Triage BR+E



Triage BR+E Select Slides: October 1, 2018



Background

Lethbridge County has been taking steps to accelerate its economic development activities. Business retention and expansion (BR+E) activities can be employed to ensure business needs are monitored and addressed; however, engagement can be time consuming and complex.

A Triage BR+E Survey was commissioned to engage businesses and report on observations generalizable to the broader business community, while also allowing for the identification of potential expansion or retention intervention opportunities, which County staff can follow-up business-by-business.

Methodology

- A random sample telephone survey, conducted with 80 businesses out of an initial sample of 242, resulting in a margin of error of +/- 5%, 19 times out of 20.
- The survey was administered between July 4st and 19th, 2018.

This Report represents the findings of the survey exercise.



Key Findings



- Overall business satisfaction in Lethbridge County is quite strong at 91.3%; with 45% being very satisfied and 46.3% somewhat satisfied. 23.8% indicate their level of satisfaction is more positive than a year ago, compared to 8.8% indicating more negative; representing a net improvement of 15%.
- Out of 19 different factors assessed relative to business performance, just one had satisfaction levels of less than 50%, but several had more than 1/3 of respondents being dissatisfied. The lowest levels of satisfaction were with municipal investment in internet infrastructure, Availability of skilled labour, Internet Service and how it meets the future needs and/or growth of your business and Internet service and how it meets the current needs of your business.
- When considering what factors are statistically most likely to lead to improved business satisfaction, Municipal investment in internet infrastructure, Municipal property taxes and Internet Service and how it meets the future needs and/or growth of your business are the top priorities. Addressing these through review, adaptation, or sustained attention are most likely to lead to higher business satisfaction.
- The local business base is largely established businesses who own their properties and have less than 10 employees.
- 56.3% of businesses are planning to expand in the next two years and the majority plan to do so in Lethbridge County.

Key Findings



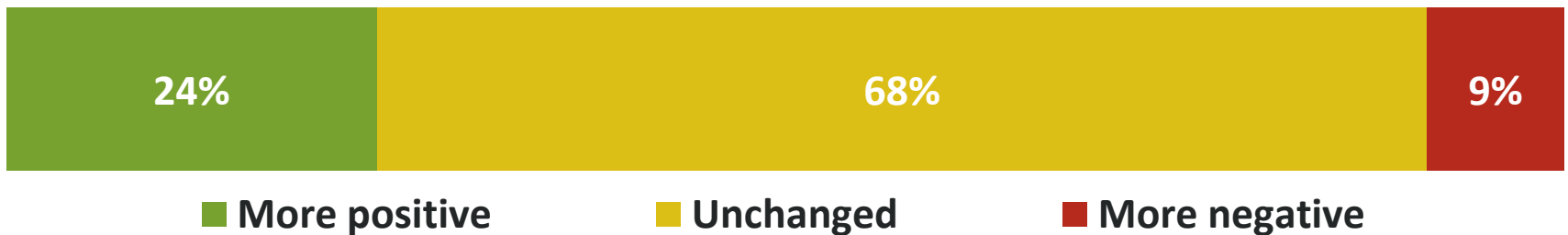
The combined overall satisfaction is very high at 91.3% . The net impact of changes over the past year is +15%.



Overall Business Satisfaction



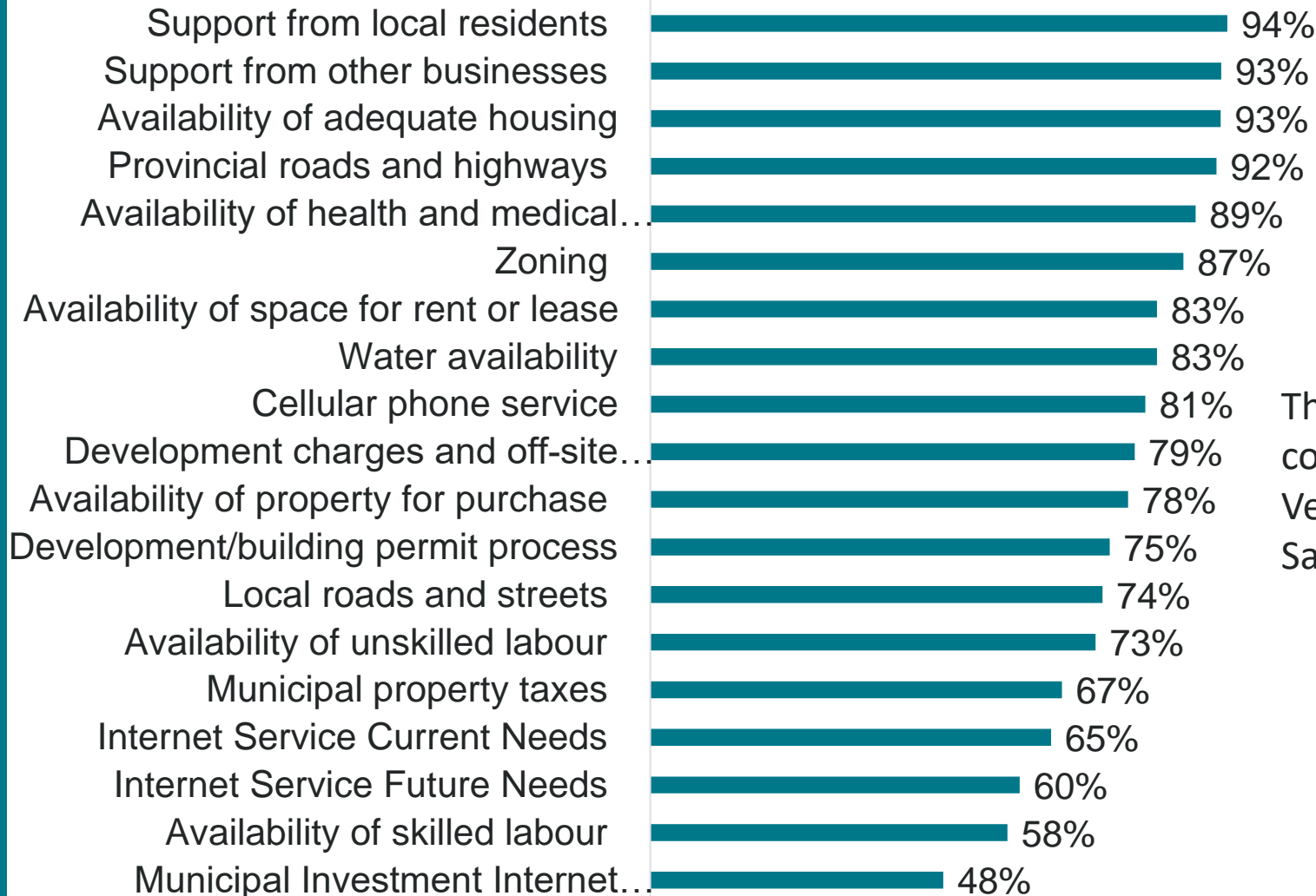
Business Satisfaction Past 12 Months



Net Improvement score = % more positive (23.8%) - % more negative (8.8%) = +15%



Performance of Business factors



The Ranking is a combination of Very Satisfied and Satisfied

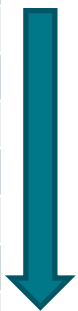




Priority Matrix



Business Factor	Importance	Performance	Priority
Municipal investment in internet infrastructure	7.9	48	1
Municipal property taxes	8.1	67	2
Internet Service and how it meets the future needs and/or growth of your business	6.7	60	3
Availability of skilled labour	6.2	58	4
Internet service and how it meets the current needs of your business	6.9	65	5
Local roads and streets	8.1	74	6
Development charges and off-site levies	7.9	79	7
Development/building permit process	6.5	75	8
Availability of property for purchase	7.2	78	9
Availability of unskilled labour	5.5	73	10
Cellular phone service	7.4	81	11
Availability of space for rent or lease	7.2	83	12
Zoning	9.1	87	13
Water availability	5.5	83	14
Availability of health and medical services	7.4	89	15
Provincial roads and highways	8.1	92	16
Support from other businesses	6.5	93	17
Support from local residents	7.4	94	18
Availability of adequate housing	4.8	93	19

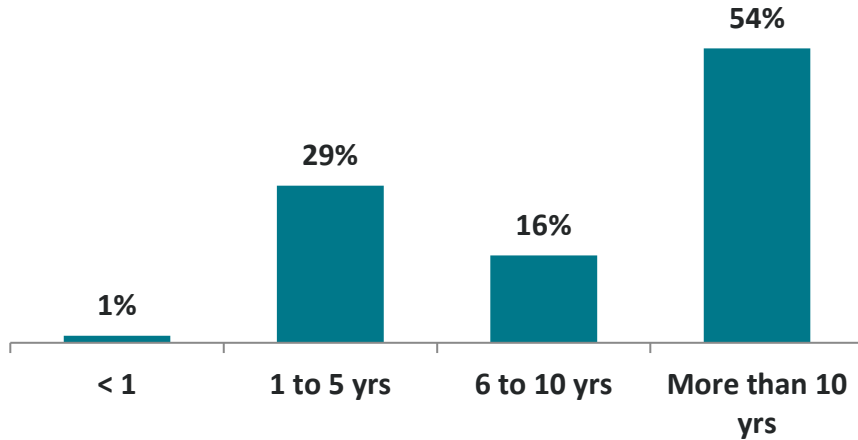




Company Profile

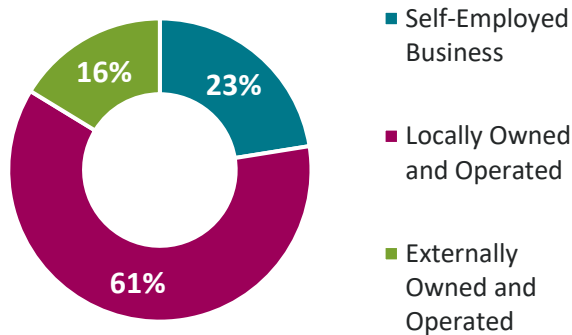


Years Operating in Lethbridge County

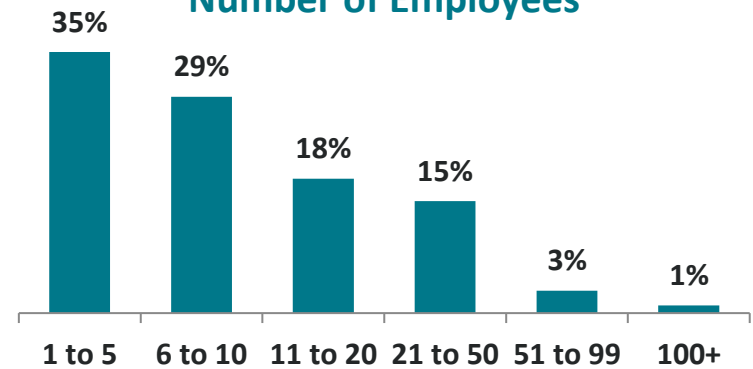


Primary target market	
Local	45%
Regional	11%
National	11%
International	10%

Business Type



Number of Employees



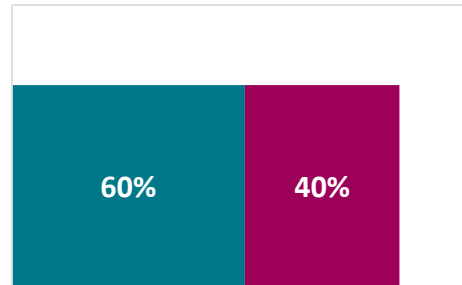


Internet Service

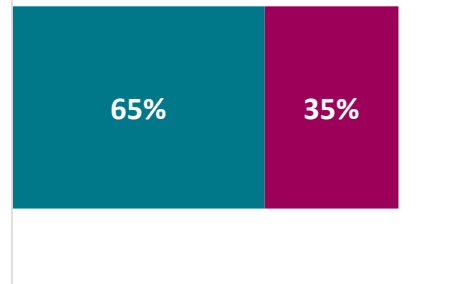


■ Satisfied ■ Dissatisfied

INTERNET SERVICE AND HOW IT MEETS THE FUTURE NEEDS AND/OR GROWTH OF YOUR BUSINESS

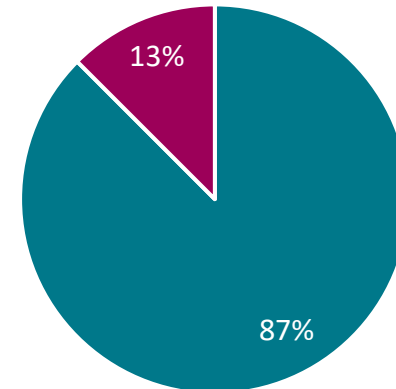


INTERNET SERVICE AND HOW IT MEETS THE CURRENT NEEDS OF YOUR BUSINESS



As a Business Owner would you be Supportive of Lethbridge County Proactively Seeking to Upgrade High speed/Broadband internet Capacity for the Business Community?

■ Yes ■ No





Future Plans



Plans to...	% Yes	Follow up Questions (note small base sizes)
Expand within next 2 years	56%	<ul style="list-style-type: none">• 12 are experiencing difficulties• 5 have reasons why Lethbridge County may not be considered• 4 would like a follow up
Relocate outside Lethbridge County	9%	<ul style="list-style-type: none">• 2 within next 6 months• 5 more than 6 months
Downsize	5%	<ul style="list-style-type: none">• 4 more than 6 months
Close	0%	No businesses plan to close
Sell	0%	No businesses plan to sell
Stay the same	51%	<ul style="list-style-type: none">• N/A