



2013 Business Survey
Draft Report

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Banister
Research & Consulting Inc.

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SUMMARY OF FINDINGS

In 2013, the City of Lacombe contracted Banister Research & Consulting Inc. (Banister Research) to conduct a survey amongst businesses operating within the City of Lacombe. The objective of the research project was to determine perceptions and opinions amongst local businesses concerning the economy in the City of Lacombe, as well as to assess satisfaction with a number of factors affecting business opportunities. A total of 173 respondents completed the survey, providing a margin of error no greater than $\pm 5.2\%$ at the 95% confidence level, or 19 times out of 20.¹

Key findings of the 2013 Business Survey included:

Business Profile

- ◆ Nearly one-third of the respondents (30%) reported that they had been in business for between one (1) and five (5) years, while nearly one-quarter (24%) had been in business for between eleven (11) and twenty (20) years. The mean number of years respondents reported having been in business was 12.6 years;
- ◆ Three-quarters of the respondents (75%) reported that their business was commercial, while 14% reported that they were industrial; 11% were home-based businesses;
 - Respondents answering the survey as a of home-based business (n=19) were asked if their business was their primary source of income; 63% of the respondents indicated that it was, while 37% reported that it was not;
 - Home-based businesses (n=19) were also asked if they were interested in moving their business from a home base to a storefront location; 37% reported that they were interested, while 63% were not;
- ◆ Nearly three-quarters of all respondents (72%) reported that their business employs fewer than 10 individuals; one-fifth (20%) had 10 to 39 employees, while 5% had 40 to 69 employees; and
- ◆ Over one-quarter of the respondents (26%) reported that their business operated in the retail industry, followed by 17% who reported working in professional, scientific, or technical services. Fifteen percent (15%) operated in the construction or mining industry.

¹ Based on a population of 342 businesses.

City of Lacombe Business Economy

- ◆ Respondents were asked what they consider to be the top issue facing Lacombe's economy today; nearly one-third of the respondents (31%) felt that the top issue is the lack of a variety of businesses, while 13% mentioned competition with bigger cities, such as Red Deer;
- ◆ Respondents were also asked what they consider to be the top issue facing their business; 12% reported experiencing staffing issues (e.g., finding qualified people and staff retention), while 10% cited the overall cost of running a business;
- ◆ Nearly half of the respondents (49%) indicated that they will be maintaining current staff levels over the next 12 months, followed closely by 47% who will be hiring. Only 1% reported that they will be reducing staff; and
- ◆ Nearly two-thirds of the respondents (65%) reported that they expect their business to grow or expand over the next 12 months, while close to one-third (30%) expect business to stay the same. Only 3% reported that they expect their business to slow down, while 1% indicated that they expect their business to fluctuate.

Satisfaction with Business Opportunities

- ◆ With regards to **financing and operating costs**, more than half of the respondents (51%) were satisfied (ratings of 4 or 5 out of 5) with access to financing. More than one-third (34%) were satisfied with the cost of labour, while just over one-fifth (21%) were satisfied with the cost of commercial space;
- ◆ Concerning **operations and infrastructure**, more than half of the respondents (56%) were satisfied (ratings of 4 or 5 out of 5) with location, while more than one-third were each satisfied with competition (39%), access to suppliers (38%), and access to a customer base (35%);
- ◆ In terms of factors **affecting labour, resources, and the community**, more than three-quarters of the respondents (76%) were satisfied with the overall quality of life in Lacombe. More than two-fifths of respondents each were satisfied with community growth (45%) and access to post-secondary education (42%); and
- ◆ Nearly half of the respondents (48%) were either somewhat (34%) or very (15%) satisfied with the City of Lacombe, overall, as a place to operate a business. One-third of the respondents (33%) were neither satisfied nor dissatisfied, while 18% were either somewhat (13%) or very (5%) dissatisfied.

Business Operations

- ◆ More than half (53%) of all respondents reported that they had worked with the City of Lacombe in the last 12 months through the operation of their business, while 46% had not;
 - More than half of the respondents who reported having worked with the City of Lacombe through the operation of their business (n=92) reported that they had worked with Planning and Development (46%). More than one-third (37%) reported having worked with Community and Economic Development, while more than one-fifth each worked with Recreation and Culture (21%) and Streets and Roads (21%);
- ◆ Thirty-seven percent (37%) of those respondents who worked with the City of Lacombe (n=92) were either somewhat (28%) or very (9%) satisfied with the City, in terms of conducting business-related operations. Nearly one-third of the respondents (32%) were neither satisfied nor dissatisfied, while 29% were either somewhat (21%) or very (9%) dissatisfied; and
- ◆ Respondents were asked how they would prefer to recycle if curbside recycling was to be implemented in residential areas of Lacombe. More than half (54%) reported that they would prefer to maintain the Wolf Creek Recycle Depot as a recycling drop-off station for commercial customers, while 40% would rather arrange for their business recycling to be picked up by qualified vendors. Six percent (6%) of the respondents were unsure.

1.0 STUDY BACKGROUND

In 2013, the City of Lacombe contracted Banister Research to conduct a survey amongst businesses in Lacombe to assess a variety of factors affecting business operations. Survey topics included:

- ◆ The City of Lacombe business economy;
- ◆ Satisfaction with business opportunities, including:
 - Financing and operating costs;
 - Operations and infrastructure;
 - Labor, Resources, and Community; and
- ◆ Business operations in Lacombe, including interactions with City of Lacombe departments.

2.0 METHODOLOGY

All components of the project were designed and executed in close consultation with the City of Lacombe (the Client). A detailed description of each task of the project is outlined in the remainder of this section.

2.1 Project Initiation and Questionnaire Design

At the outset of the project, all background information relevant to the study was identified and subsequently reviewed by Banister Research. The consulting team familiarized itself with the objectives of the Client, ensuring a full understanding of the issues and concerns to be addressed in the project. The result of this task was an agreement on the research methodology, a detailed work plan and project initiation.

The questionnaire for the 2013 City of Lacombe Business Survey was designed in consultation with the Client. The survey included both quantitative and qualitative questions, in order to elicit a more in-depth investigation of the issues and concerns pertinent to the evaluation assignment. A copy of the final questionnaire has been provided in Appendix A.

2.2 Survey Population and Data Collection

The web-based survey was available online from April 17th to May 6th, 2013; the survey was hosted on the Banister web server to ensure anonymity and the confidentiality of responses. A total of 173 surveys were completed (115 by web and 58 by telephone). Overall results provide a margin of error no greater than $\pm 5.2\%$ at the 95% confidence level or 19 times out of 20.²

To maximize the sample, two (2) reminder e-mails were sent to each potential business that had not completed the survey online, and up to five (5) scripted reminder calls were placed. Busy numbers were scheduled for a call back every fifteen (15) minutes. Where there was an answering machine, fax, or no answer, the call back was scheduled for a different time period on the following day. The first attempts to reach each listing were made during regular business hours.

The following table presents the results of the final call attempts. Using the call summary standard established by the Market Research and Intelligence Association, there was a 68% response rate and a 11% refusal rate. It is important to note that the calculation used for both response and refusal rates is a conservative estimate and does not necessarily measure respondent interest in the subject area.

Summary of Final Call Attempts	
Call Classification:	Number of Calls:
Completed Interviews ³	173
Busy/No Answer/Answering Machine	24
Respondents Unavailable	30
Refusals	29
Fax/Modem/Not-In-Service/Wrong Number	29
Language Barrier/Communication Problem	1
Disqualified/Quota Full	7
Total	293

² Based on a population of 342 businesses.

³ Includes surveys completed online and via telephone

At the outset of the fieldwork, all interviewers and supervisors were given a thorough step-by-step briefing to ensure the successful completion of telephone interviews. To ensure quality, at least 20% of each interviewer's work was monitored by a supervisor on an on-going basis.

The questionnaire was programmed into Banister Research's Computer Assisted Telephone Interviewing (CATI) system. Using this system, data collection and data entry were simultaneous, as data was entered into a computer file while the interview was being conducted. Furthermore, the CATI system allowed interviewers to directly enter verbatim responses to open-ended questions.

2.3 Data Analysis and Project Documentation

While data was being collected, Banister Research provided either a written or verbal progress report to the Client. After the interviews were completed and verified, the lead consultant reviewed the list of different responses to each open-ended or verbatim question and then a code list was established. To ensure consistency of interpretation, the same team of coders was assigned to this project from start to finish. The coding supervisor verified at least 20% of each coder's work. Once the responses were fully coded and entered onto the data file, computer programs were written to check the data for quality and consistency.

Data analysis included cross-tabulation, whereby the frequency and percentage distribution of the results for each question were broken down based on respondent characteristics and responses (e.g. length of residency, demographics, etc.). Statistical analysis included a Z-test to determine if there were significant differences in responses between respondent subgroups. Results were reported as statistically significant at the 95% confidence level.

Tabulations of the detailed data tables have been provided under separate cover. The reader should note that any discrepancies between charts, graphs or tables are due to rounding of the numbers.

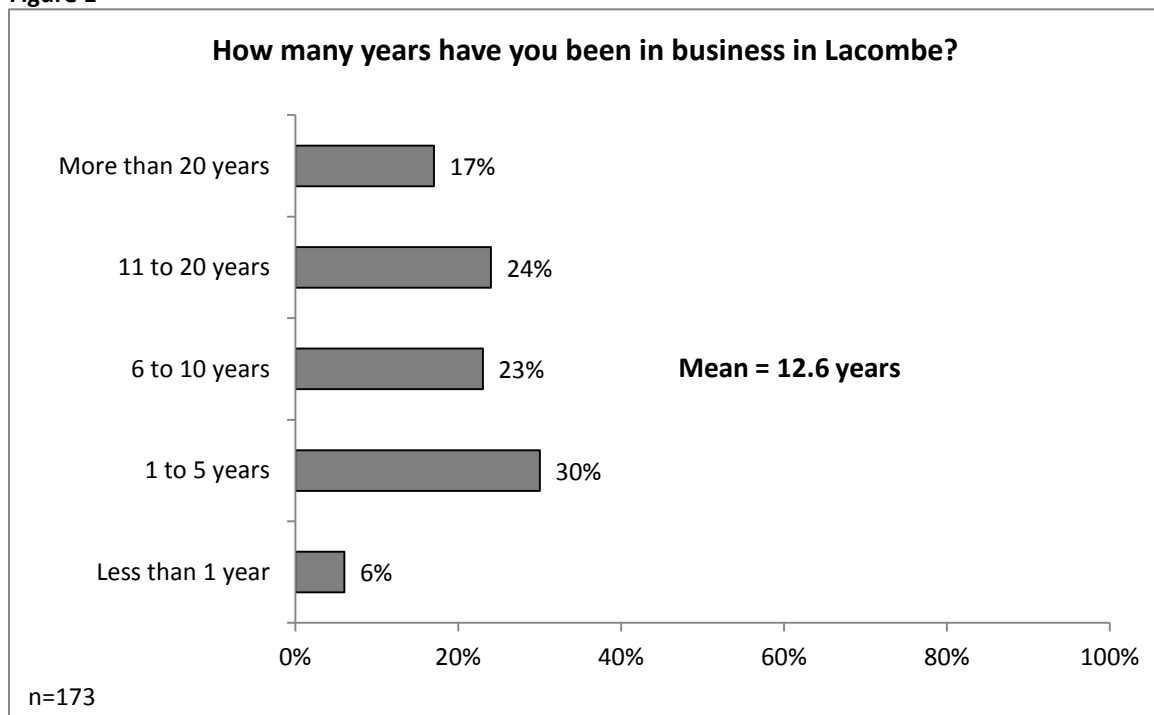
3.0 STUDY FINDINGS

Results of the survey are presented as they relate to the specific topic areas addressed by the survey. It is important to note that the data tables, under a separate cover, provide a detailed analysis of all survey findings. In particular, a comprehensive listing of all open-ended responses has been provided in these tables. The reader should also note, when reading the report that the term *significant* refers to “statistical significance”. Only those respondent subgroups which reveal statistically significant differences at the 95% confidence level (19 times out of 20) have been reported on. Respondent subgroups that are statistically similar have been omitted from the presentation of findings.

3.1 Business Profile

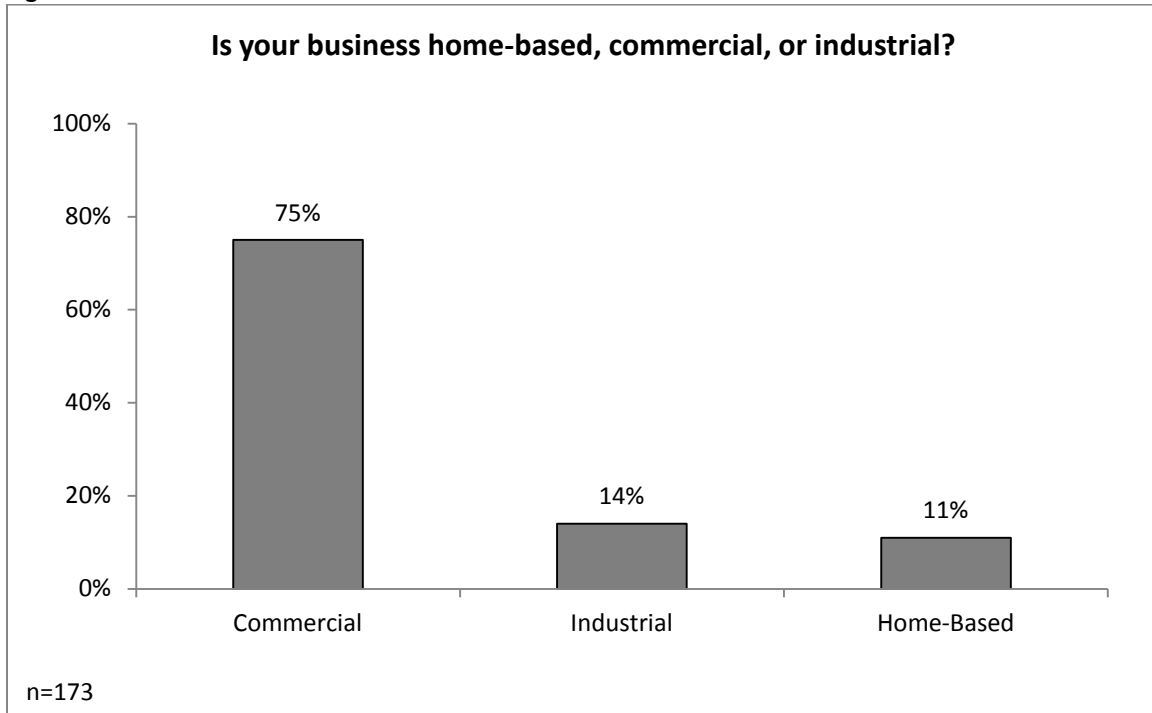
To begin the survey, respondents were asked how long they had been in business in the City of Lacombe. Nearly one-third of the respondents (30%) reported that they had been in business for between one (1) and five (5) years, while nearly one-quarter (24%) had been in business for between eleven (11) and twenty (20) years. See Figure 1, below.

Figure 1



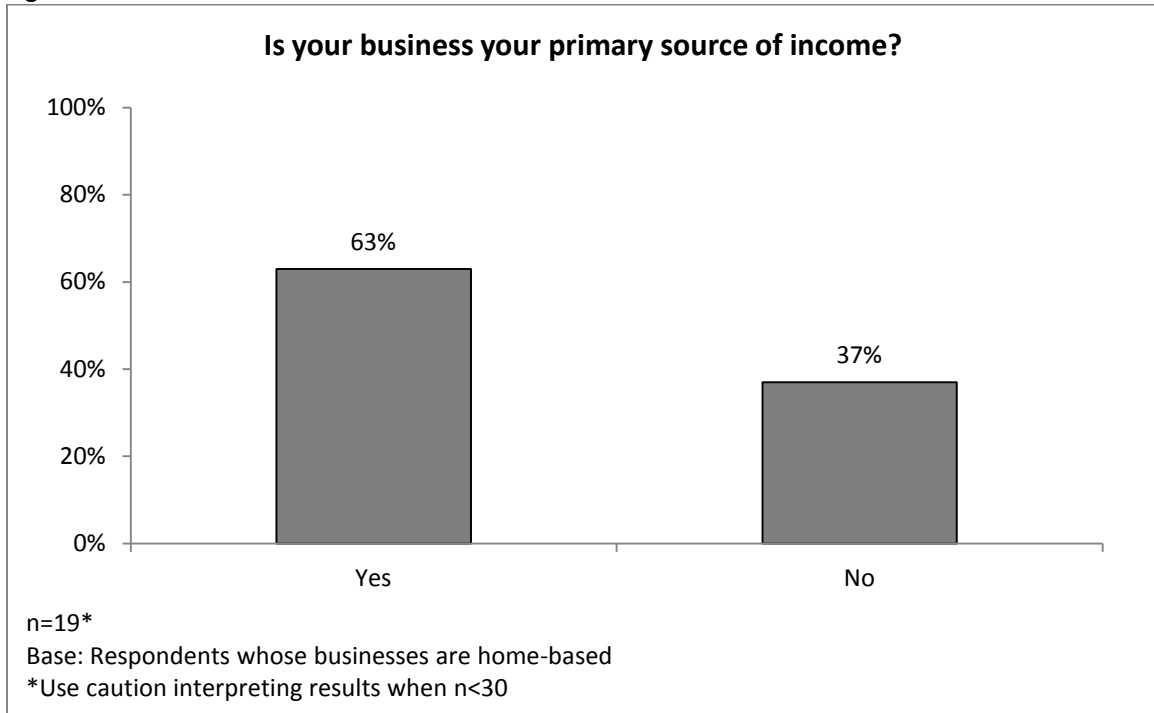
Three-quarters of the respondents (75%) reported that their business was commercial, while 14% reported that they were industrial; 11% were home-based businesses. See Figure 2, below.

Figure 2



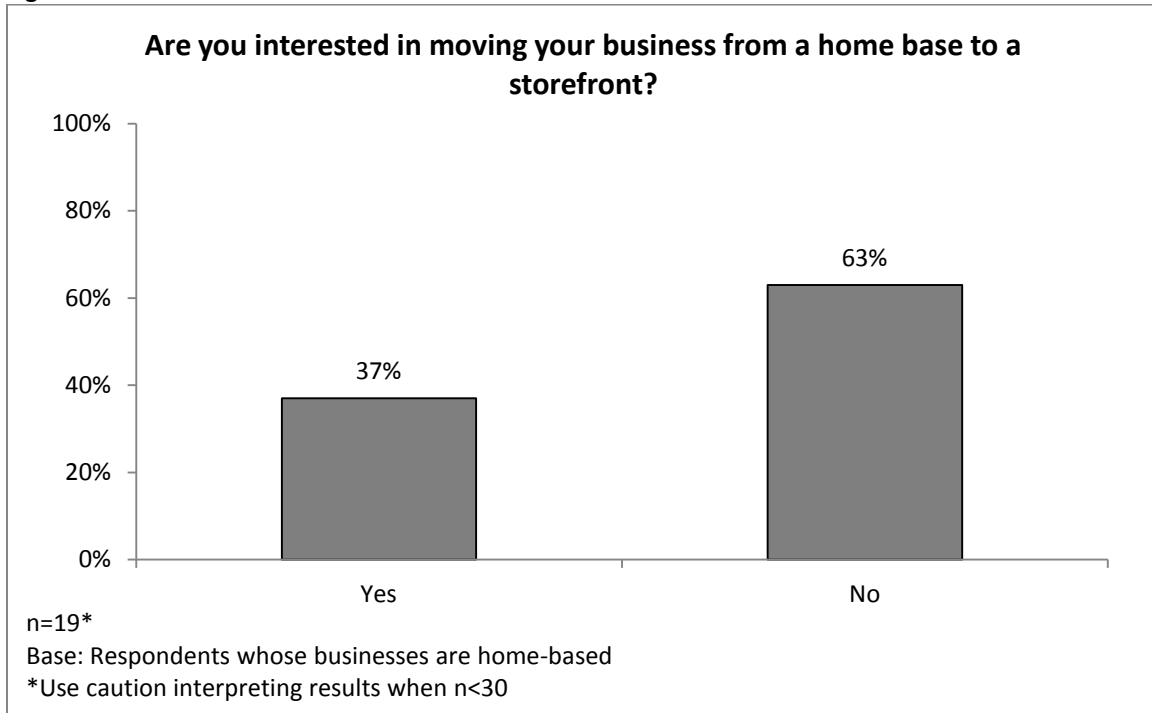
Respondents answering the survey on behalf of home-based businesses (n=19) were asked if their business was their primary source of income; 63% of the respondents indicated that it was, while 37% reported that it was not. See Figure 3, below.

Figure 3



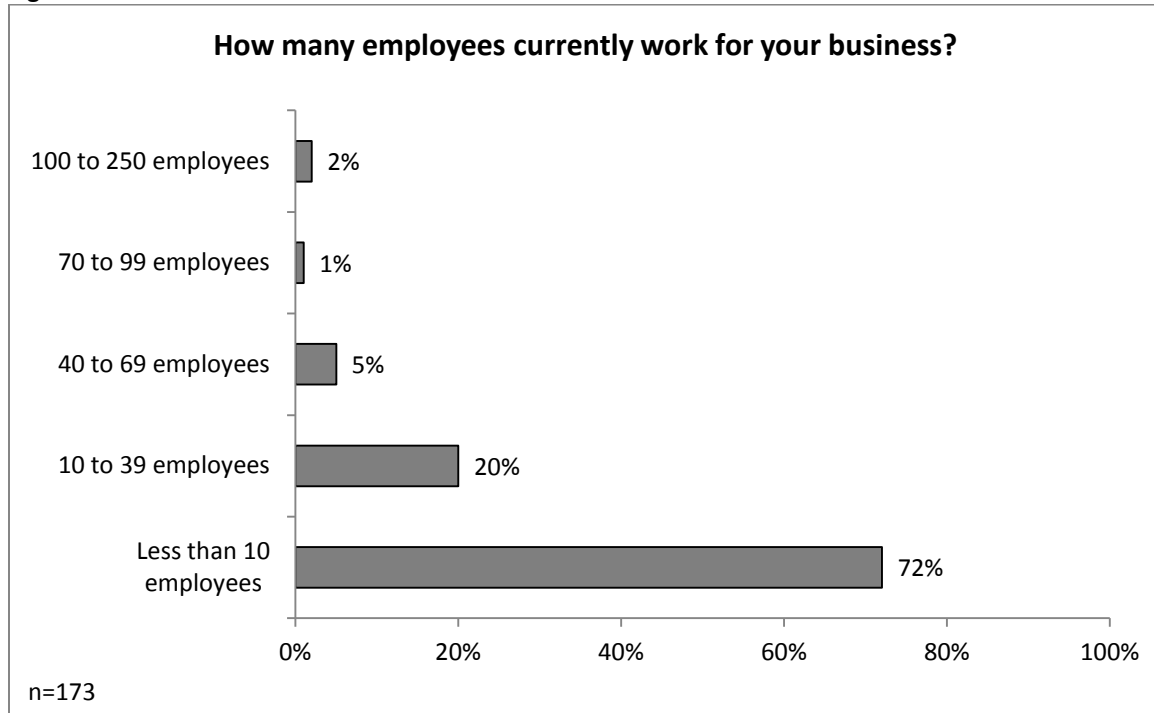
Next, home-based businesses (n=19) were asked if they were interested in moving their business from a home base to a storefront location; 37% reported that they were interested, while 63% were not. See Figure 4, below.

Figure 4



Nearly three-quarters of all respondents (72%) reported that their business employs fewer than 10 individuals; one-fifth (20%) had 10 to 39 employees, while 5% had 40 to 69 employees. See Figure 5, below.

Figure 5



More than one-quarter of the respondents (26%) reported that their business operated in the retail industry, followed by 17% who reported working in professional, scientific, or technical services. Fifteen percent (15%) operated in the construction or mining industry. See Table 1, below.

Table 1

In what industry or sector does your business operate?	
	Percent of Respondents (n=173)
Retail	26
Professional, Scientific, or Technical Services	17
Construction/Mining	15
Accommodation or Food Services	8
Oil and Gas	8
Other Services (excluding Public Administration)	6
Arts, Entertainment, and Recreation	5
Agriculture	4
Health Care and Social Assistance	3
Other (2% of respondents or less)	9

3.2 City of Lacombe Business Economy

Respondents were next asked a series of questions concerning their perceptions of the business economy in the City of Lacombe. First, respondents were asked what they consider to be the top issue facing Lacombe's economy today; nearly one-third of the respondents (31%) felt that the top issue is the lack of a variety of businesses, while 13% mentioned competition with bigger cities, such as Red Deer. Twelve percent (12%) reported having difficulty in increasing their customer base, or felt that Lacombe faced issues in attracting new residents and consumers. It is important to note that more than one-fifth of the respondents (21%) were unsure, or were unable to specify any issues facing Lacombe's economy. See Table 2, below.

Table 2

What do you think is the top issue facing the City of Lacombe's economy today?	
	Percent of Respondents (n=173)
Lack of variety of retail/businesses	31
Proximity to Red Deer/competition with bigger cities	13
Attracting residents/consumers/increasing client base	12
Is not business-friendly/difficult to establish/do business	10
High taxes/ cost of doing business/lack of commercial tax base	9
Lack of amenities/services/programs (in general)	6
Lack of lots/space for use/lack of land for development	6
Poor budgeting/allocation of funds/lack of revenue	3
Lack of accommodations/hotels/event space	3
Poor infrastructure/lack of maintenance/repair	3
Poor management/leadership by Council	3
Other (2% of respondents or less)	12
None/there are no issues	4
Refuse/Don't Know	21

*Multiple responses

Next, respondents were asked what they considered to be the top issue facing their business; 12% reported experiencing staffing issues (e.g., finding qualified people and staff retention), while 10% cited the overall cost of running a business. Nine percent (9%) each reported competition with nearby cities, lack of promotion or advertising, and lack of space for expansion or development. See Table 3, below.

Table 3

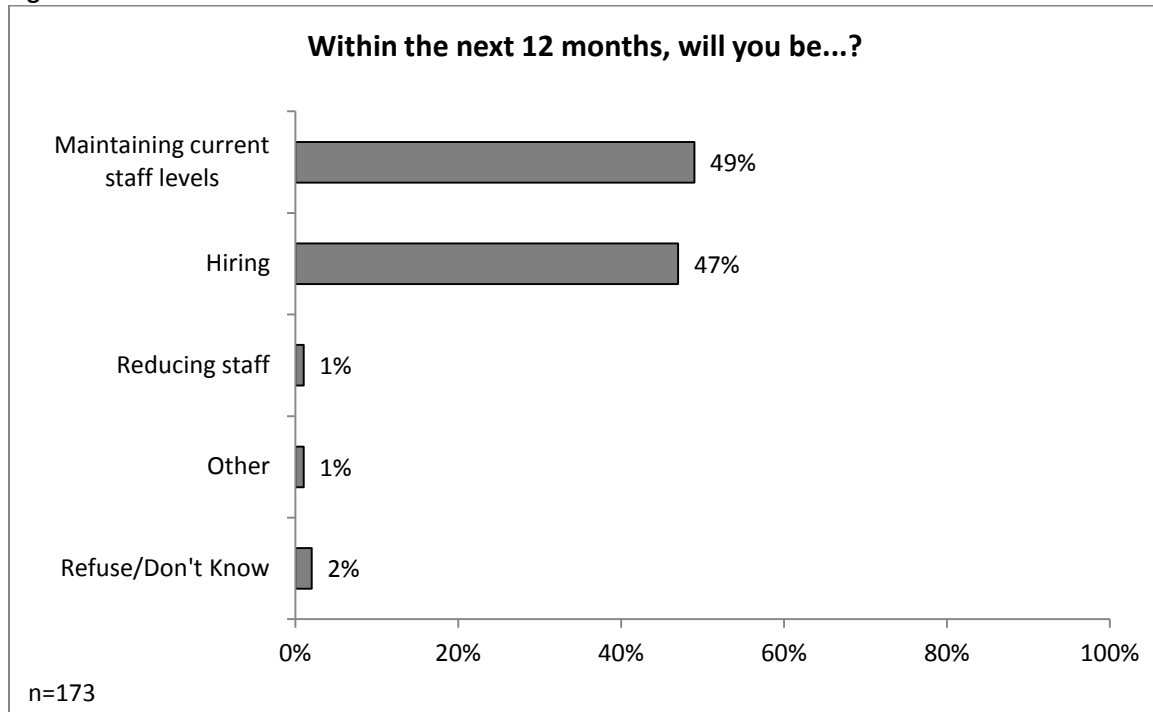
What do you think is the top issue facing your business in Lacombe?	
	Percent of Respondents (n=173)
Staffing issues/ (e.g., qualified people, retention)	12
The cost of running a business (in general)	10
Competition with other cities/nearby areas	9
Promotion/advertising/marketing/signage	9
Lack of space for expansion/relocation/development	9
Attracting clients/customers/lack of customers	6
Competition with other businesses (in general)	6
Lack of available parking (in general)	5
Lack of suppliers available (e.g., products/services/materials)	4
Attracting/keeping residents in the City/growth of the community	4
Lack of available businesses/generating traffic to the area	4
Poor location/accessibility	3
Other (2% of respondents or less)	18
None/there are no issues	10
Refuse/Don't Know	13

*Multiple responses

Respondents were asked to think about what they expect regarding their workforce situation in the next 12 months. Nearly half of the respondents (49%) indicated that they will be maintaining current staff levels, followed closely by 47% who will be hiring. Only 1% reported that they will be reducing staff.

Respondents who indicated another workforce situation reported that they do not need more employees and/or that they operate their business as the sole employee (2%). See Figure 6, below.

Figure 6

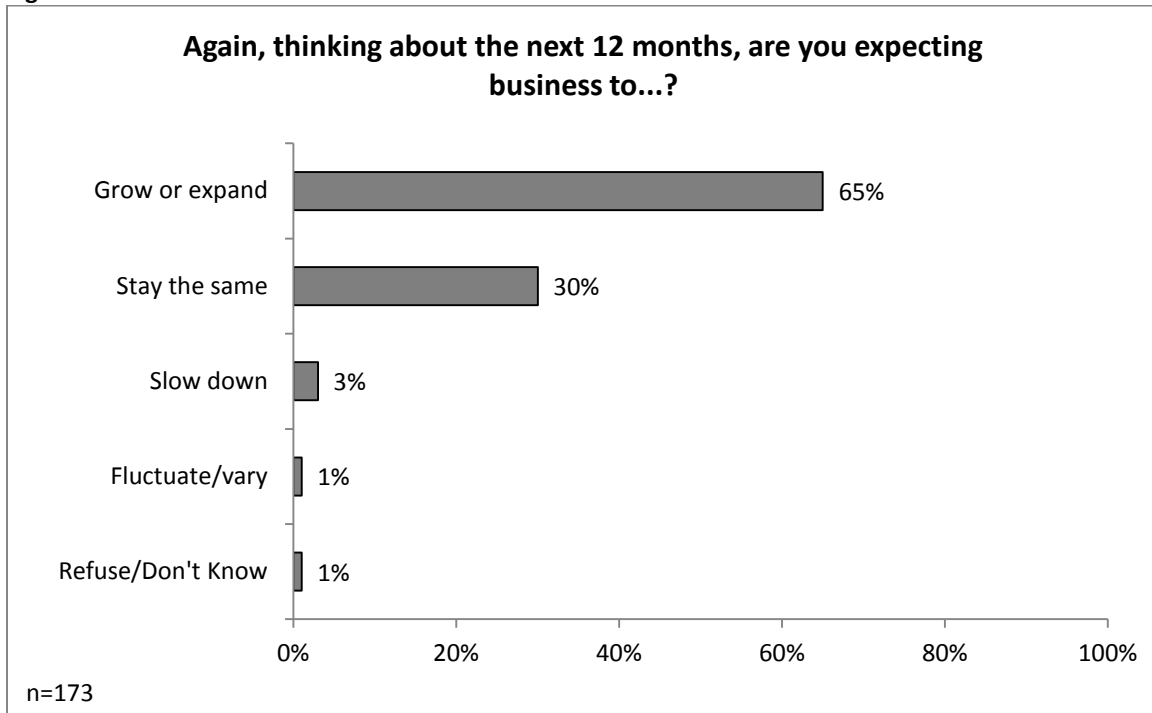


The respondent subgroup significantly more likely to have reported that **they will be maintaining current staff levels** over the next 12 months included those whose businesses employ fewer than 10 people (55%) versus those whose businesses employ 10 people or more (35%).

The respondent subgroup significantly more likely to have reported that **they will be hiring** over the next 12 months included those whose businesses employ 10 people or more (63%) versus those whose businesses employ fewer than 10 people (40%).

Still thinking about the next 12 months, respondents were next asked whether they expected their business to grow, slow down, or stay the same. Nearly two-thirds of the respondents (65%) reported that they expect their business to grow or expand, while close to one-third (30%) expect business to stay the same. Only 3% reported that they expect their business to slow down, while 1% indicated that they expect their business to fluctuate. See Figure 7, below.

Figure 7



3.3 Satisfaction with Business Opportunities

The next section of the survey asked respondents to rate their level of satisfaction with a number of factors affecting business in the City of Lacombe. Using a scale of 1 to 5, where 1 meant “not at all satisfied” and 5 meant “very satisfied,” respondents were asked to rate their level of satisfaction with factors concerning financing and operating costs, operations and infrastructure, and labour, resources, and the community.

3.3.1 Financing and Operating Costs

With regards to financing and operating costs, more than half of the respondents (51%) were satisfied (ratings of 4 or 5 out of 5) with their access to financing. More than one-third (34%) were satisfied with the cost of labour, while just over one-fifth (21%) were satisfied with the cost of commercial space. See Figure 8, below, and Table 4, on the following page.

Figure 8

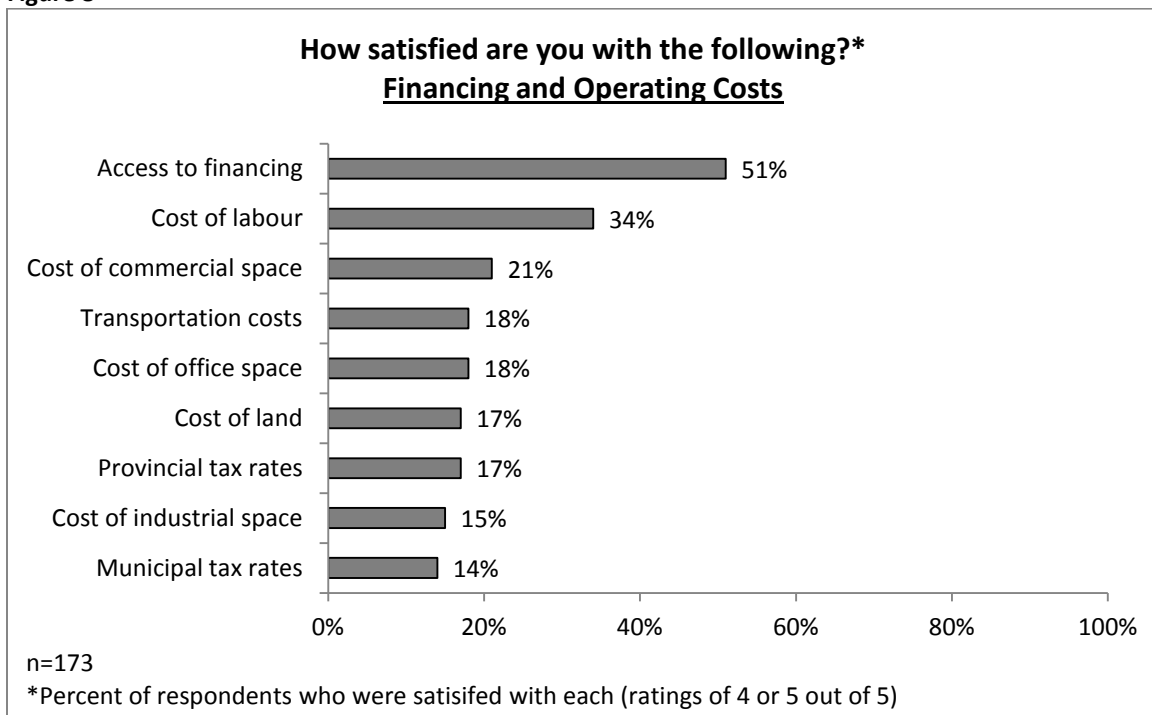


Table 4

How satisfied are you with the following? <u>Financing and Operating Costs</u>							
	Percent of Respondents (n=173)						
	(5) Very Satisfied	(4)	(3)	(2)	(1) Not at all Satisfied	Refuse/ Don't Know	Mean (out of 5)
Access to financing	23	29	25	10	5	8	3.58
Cost of labor	8	26	40	13	5	8	3.19
Cost of office space	5	13	39	14	9	21	2.90
Transportation costs	3	15	39	15	9	20	2.85
Cost of industrial space	2	13	35	13	8	30	2.84
Provincial tax rates	5	13	45	19	10	8	2.81
Cost of commercial space	4	17	30	21	10	18	2.80
Cost of land	5	12	35	21	14	13	2.68
Municipal tax rates	1	13	34	24	18	10	2.50

With regards to most of the above factors associated with **financing and operating costs**, respondent subgroups significantly more likely to have been satisfied with each included:

- ◆ Those who were satisfied, overall, with Lacombe as a place to do business versus those who were dissatisfied, or neither satisfied nor dissatisfied; and/or
- ◆ Those who were satisfied, overall, with the City of Lacombe, in terms of conducting business-related operations.

Additional sub-segment findings included:

- ◆ The respondent subgroup significantly more likely to have been satisfied with **access to financing** included those whose businesses employ 10 or more people (67%) versus those who employ fewer than 10 people (45%); and
- ◆ The respondent subgroup significantly more likely to have been satisfied with **municipal tax rates** included those who have operated their business in Lacombe for five (5) years or less (21%) versus those who have done business in Lacombe for more than five (5) years (10%).

3.3.2 Operations and Infrastructure

Concerning operations and infrastructure, more than half of the respondents (56%) were satisfied (ratings of 4 or 5 out of 5) with location, while more than one-third were each satisfied with competition (39%), access to suppliers (38%), and access to a customer base (35%). At least one-quarter each were satisfied with communications and technology infrastructure (29%) and local regulations and processes (25%). See Figure 9, below, and Table 5, on the following page.

Figure 9

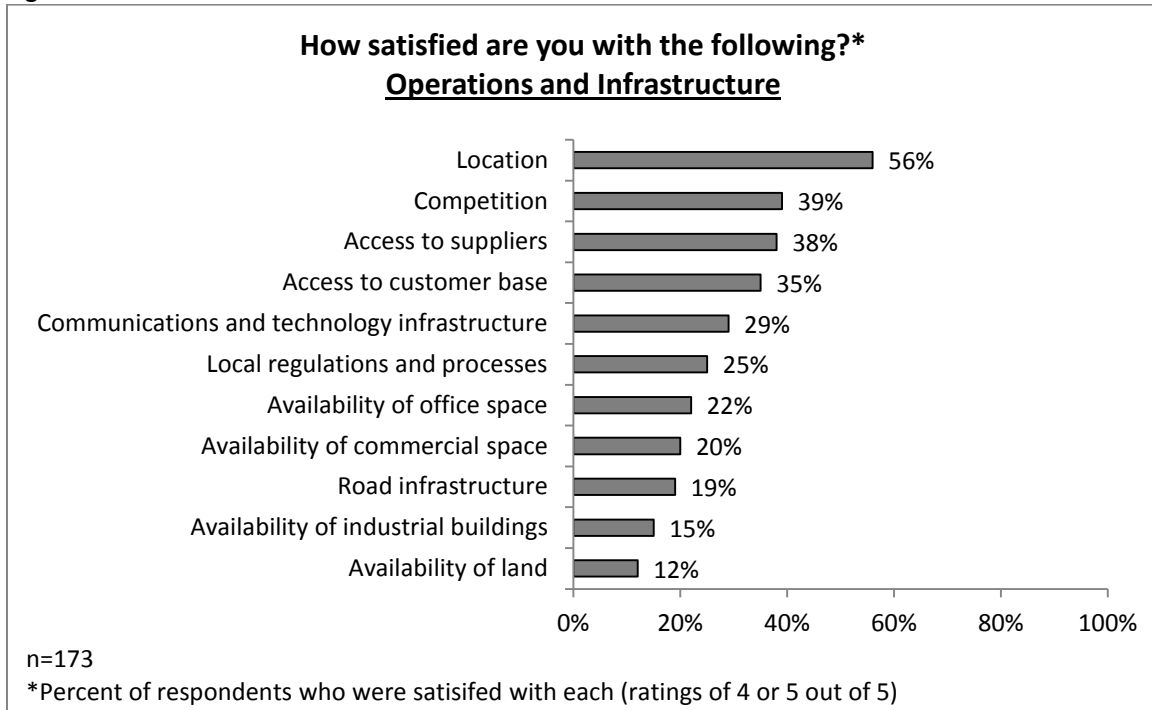


Table 5

How satisfied are you with the following? <u>Operations and Infrastructure</u>							
	Percent of Respondents (n=173)						
	(5) Very Satisfied	(4)	(3)	(2)	(1) Not at all Satisfied	Refuse/ Don't Know	Mean (out of 5)
Location	24	31	20	8	6	11	3.68
Competition	10	29	38	10	5	8	3.31
Access to suppliers	8	30	31	14	6	11	3.21
Access to customer base	6	29	35	17	6	7	3.14
Communications and technology infrastructure	5	24	35	16	8	13	3.03
Availability of office space	6	16	33	11	8	26	3.02
Availability of commercial space	6	15	34	16	10	20	2.87
Availability of industrial buildings	4	11	36	10	8	31	2.87
Local regulations and processes	4	21	34	20	15	6	2.78
Availability of land	4	8	35	20	12	21	2.66
Road infrastructure	4	15	23	33	20	5	2.47

With regards to each of the above factors associated with **operations and infrastructure**, respondent subgroups significantly more likely to have been satisfied with each (with the exception of availability of industrial buildings and availability of land) included:

- ◆ Those who were satisfied, overall, with Lacombe as a place to do business versus those who were dissatisfied, or neither satisfied nor dissatisfied; and/or
- ◆ Those who were satisfied, overall, with the City of Lacombe, in terms of conducting business-related operations.

3.3.3 Labour, Resources, and Community

In terms of factors affecting labour, resources, and the community, more than three-quarters of the respondents (76%) were satisfied with the overall quality of life in Lacombe. More than two-fifths of respondents each were satisfied with community growth (45%) and access to post-secondary education (42%), while nearly one-third each were satisfied with access to professional development programs and training (31%) and business-to-business (B2B) networking opportunities. See Figure 10, below, and Table 6, on the following page.

Figure 10

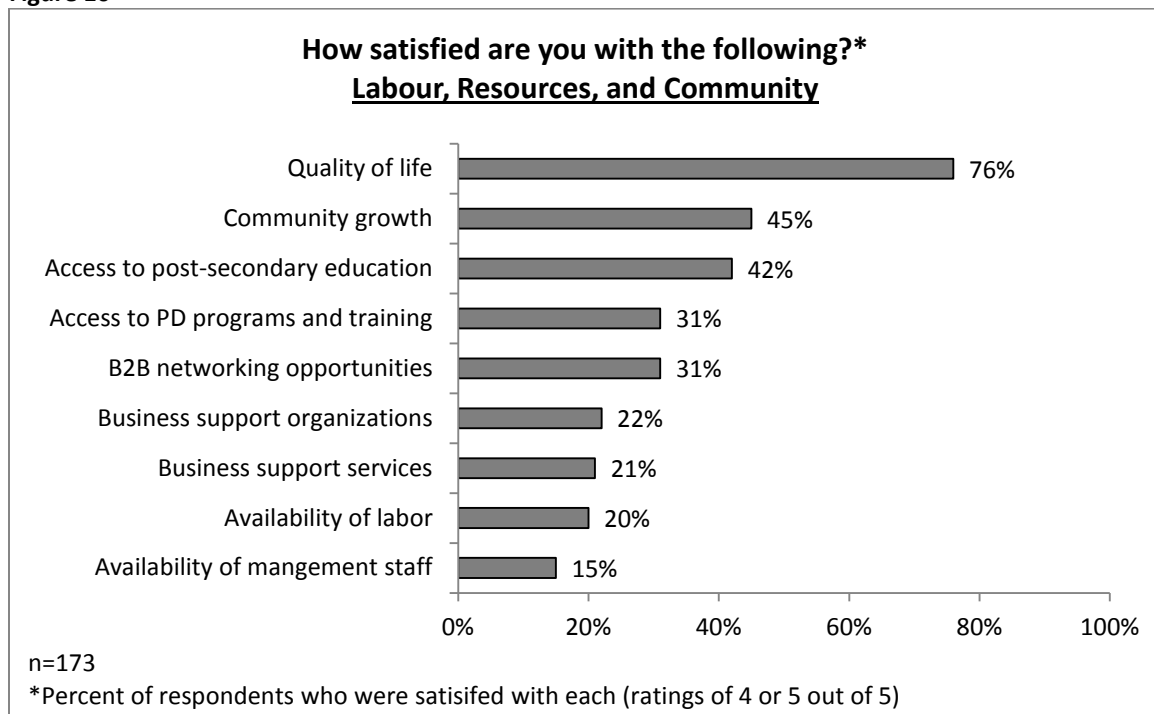


Table 6

How satisfied are you with the following? <u>Labour, Resources, and Community</u>							
	Percent of Respondents (n=173)						
	(5) Very Satisfied	(4)	(3)	(2)	(1) Not at all Satisfied	Refuse/ Don't Know	Mean (out of 5)
Quality of life	24	52	17	2	1	5	4.01
Access to post-secondary education	10	32	30	12	6	11	3.32
Community growth	11	34	27	17	6	5	3.28
Business to business (B2B) networking opportunities	7	24	42	13	5	10	3.17
Access to professional development programs and training	5	26	33	16	8	13	3.07
Business support organizations	7	15	45	16	5	12	3.03
Business support services	5	16	42	19	9	9	2.89
Availability of labor	3	17	35	27	10	8	2.73
Availability of management staff	4	12	36	22	10	17	2.72

With regards to each of the above factors associated with **labour, resources, and community**, respondent subgroups significantly more likely to have been satisfied with each (with the exception of availability of industrial buildings and availability of land) included:

- ◆ Those who were satisfied, overall, with Lacombe as a place to do business versus those who were dissatisfied, or neither satisfied nor dissatisfied; and/or
- ◆ Those who were satisfied, overall, with the City of Lacombe, in terms of conducting business-related operations.

Additional sub-segment findings included:

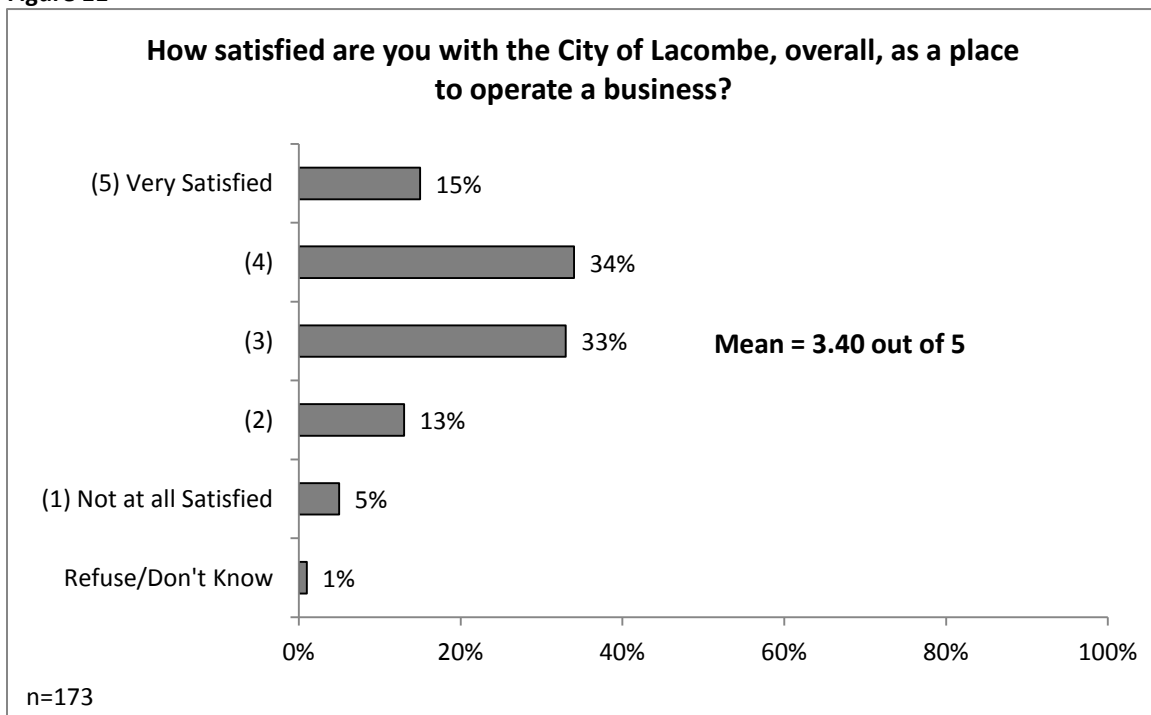
- ◆ The respondent subgroup significantly more likely to have been satisfied with **business support organizations** included those whose businesses employ 10 or more people (39%) versus those who employ fewer than 10 people (15%);
- ◆ The respondent subgroup significantly more likely to have been satisfied with **availability of labour** included those who have operated their business in Lacombe for five (5) years or less (29%) versus those who have done business in Lacombe for more than five (5) years (16%); and

- ◆ The respondent subgroup significantly more likely to have been satisfied with **availability of management staff** included those who have not worked with the City in the past 12 months through the operation of their business, or those who were unsure (22%), versus those who have worked with the City (9%).

3.3.4 Overall Satisfaction

Next, respondents were asked how satisfied they were, overall, with the City of Lacombe as a place to operate a business, using a scale of 1 to 5, where 1 meant “not at all satisfied” and 5 meant “very satisfied.” Nearly half of the respondents (48%) were either somewhat (34%) or very (15%) satisfied. One-third of the respondents (33%) were neither satisfied nor dissatisfied, while 18% were either somewhat (13%) or very (5%) dissatisfied. See Figure 11, below.

Figure 11

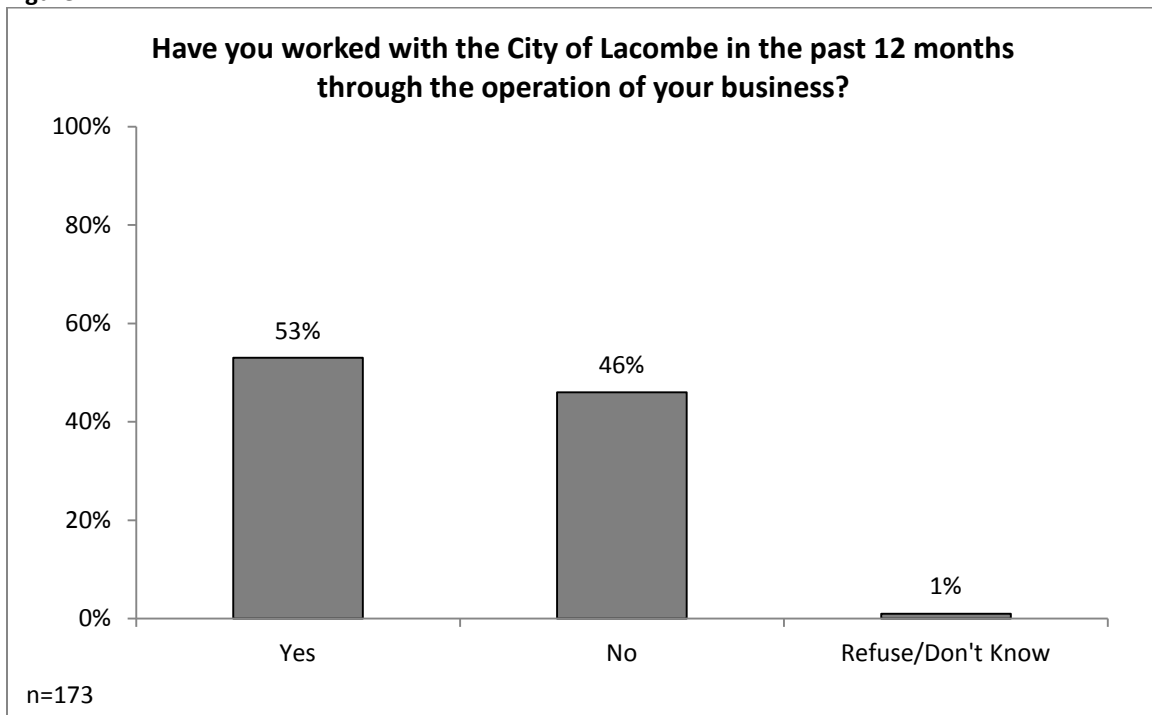


The respondent subgroup significantly more likely to have been **satisfied with Lacombe, overall, as a place to operate a business** included those who were satisfied with the City in terms of conducting business-related operations (82%) versus those who were dissatisfied, or neither satisfied nor dissatisfied (23%).

3.4 Business Operations

All of the respondents were next asked if they had worked with the City of Lacombe in the past 12 months through the operation of their business; more than half (53%) reported that they had, while 46% had not. See Figure 12, below.

Figure 12



More than half of the respondents who reported having worked with the City of Lacombe through the operation of their business (n=92) reported that they had worked with Planning and Development (46%). More than one-third (37%) reported having worked with Community and Economic Development, while more than one-fifth each worked with Recreation and Culture (21%) and Streets and Roads (21%). See Table 7, below.

Table 7

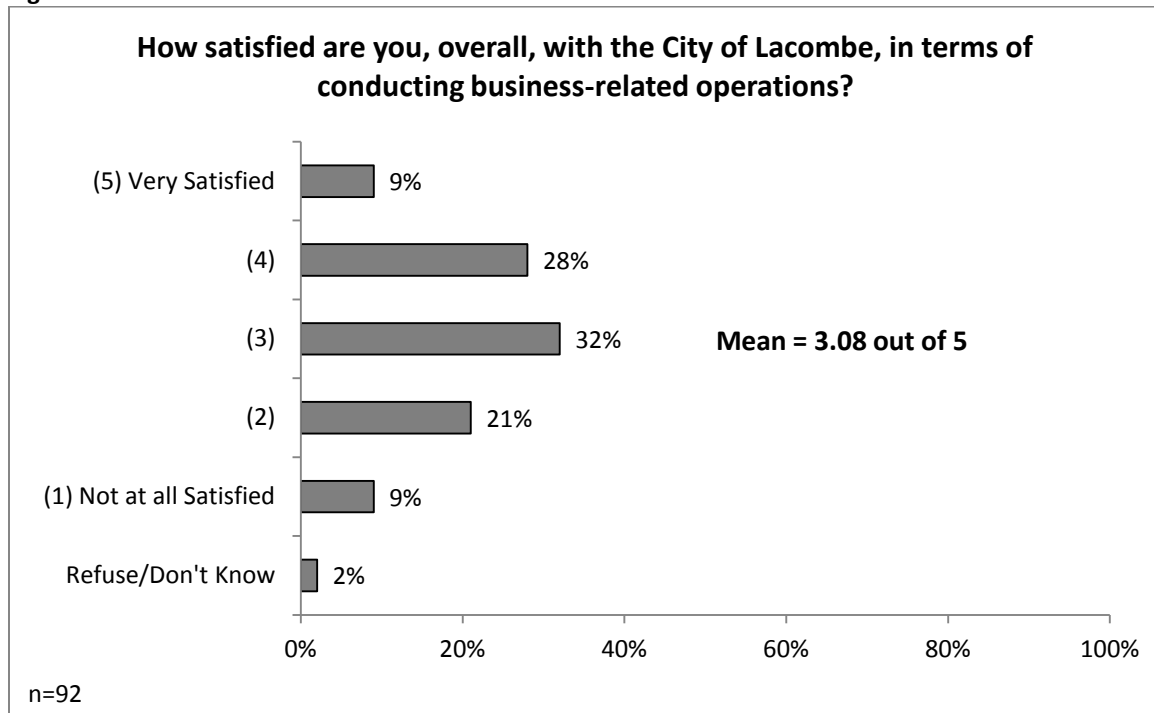
Which departments have you worked with in the last 12 months?	
	Percent of Respondents (n=92)
Planning and Development	46
Community and Economic Development	37
Recreation and Culture	21
Streets and Roads	21
Utilities and Fleet	20
Communications	14
Marketing	12
Engineering	11
Parks and Facilities	11
Financial Services	8
Computer and Information Systems	5
Fire Chief	5
Human Resources	4
Bylaw Enforcement	2
Supplying/Purchasing	1
Education	1
Don't Know/Not Stated	4

*Multiple responses

The respondent subgroup significantly more likely to have **worked with Community and Economic Development** included those who have operated their business in Lacombe for more than five (5) years (46%) versus those who have done business in Lacombe for five (5) years or less (23%).

Using a scale of 1 to 5, where 1 meant “not at all satisfied” and 5 meant “very satisfied,” respondents who worked with the City of Lacombe within the past 12 months (n=92) were asked to indicate how satisfied they were, overall, with the City of Lacombe, in terms of conducting business-related operations. Thirty-seven percent (37%) were either somewhat (28%) or very (9%) satisfied, while nearly one-third of the respondents (32%) were neither satisfied nor dissatisfied. Twenty-nine percent (29%) were either somewhat (21%) or very (9%) dissatisfied. See Figure 13, below.

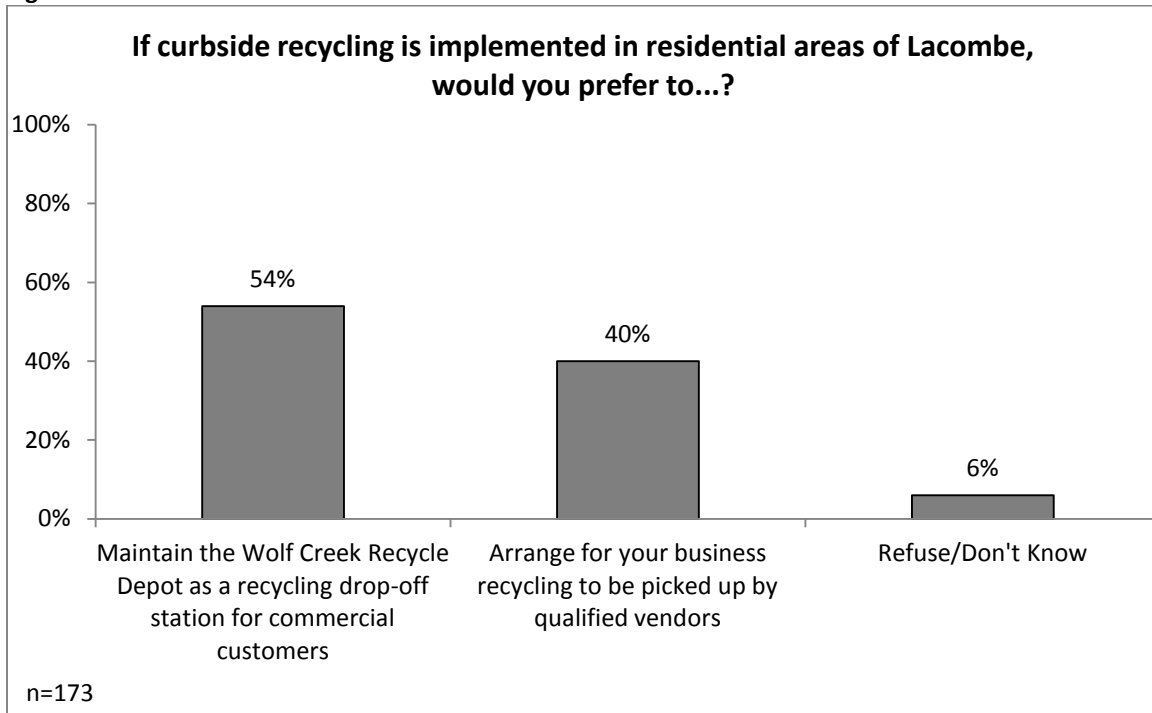
Figure 13



The respondent subgroup significantly more likely to have been **satisfied, overall, with the City of Lacombe, in terms of conducting business-related operations**, included those who were satisfied with Lacombe as a place to operate a business (67%) versus those who were dissatisfied, or neither satisfied nor dissatisfied (12%).

Finally, respondents were asked how they would prefer to recycle if curbside recycling was to be implemented in residential areas of Lacombe. More than half (54%) reported that they would prefer to maintain the Wolf Creek Recycle Depot as a recycling drop-off station for commercial customers, while 40% would rather arrange for their business recycling to be picked up by qualified vendors. Six percent (6%) of the respondents were unsure. See Figure 14, below.

Figure 14



Appendix A
Survey Instrument

CITY OF LACOMBE

2013 BUSINESS SURVEY

Introduction

Banister Research and Consulting Inc. has been contracted to conduct a survey of Lacombe-based businesses on behalf of the City of Lacombe. The City is interested in your opinions about the Lacombe business climate. The information collected will be used to provide guidance in the development of services and programs to support the local business community.

Please be assured that all of your responses are confidential, and businesses and their employees will not be individually identified. Your input is extremely valuable in helping the City of Lacombe understand the issues and opportunities facing businesses.

The survey will take approximately 10 minutes to complete.

If you wish to talk to a City official about this survey, we encourage you to talk to [Deven Kumar] at (403)782-1236] during regular business hours, and specifically identify questions or concerns with the survey.

QUALIFIER

A. To confirm, is your business located within the City of Lacombe?

1. Yes
2. No **THANK AND TERMINATE**

1. How many years have you been in business in Lacombe? _____ RECORD VERBATIM

1A. Is your business home-based, or commercial or industrial?

1. Home-based
2. Commercial
3. Industrial

2. How many employees currently work for your business?
 1. Less than 10 employees
 2. 10 to 39 employees
 3. 40 to 69 employees
 4. 70 to 99 employees
 5. 100 to 250 employees
 6. More than 250 employees
 - F5 (Don't Know/Not Stated)

3. In what industry or sector does your business **primarily** operate?
 1. Retail
 2. Construction/manufacturing
 3. Agriculture
 4. Oil & Gas
 5. Professional, Scientific, or Technical Services
 6. Accommodations or Food Services
 7. Other - **specify**
 - F5 (Don't Know/Not Stated)

4. What do you think is the top issue facing the City of Lacombe's economy today?
 1. Other - **specify**
 - F5 (Don't Know)

5. What do you think is the top issue facing your business in Lacombe?
 1. Other - **specify**
 - F5 (Don't Know)

6. Within the next 12 months, what do you expect for your workforce situation? Will you be...?
 1. Hiring
 2. Maintaining the current staff level
 3. Reducing staff
 4. Other - **specify**
 - F5 (Don't Know/Not Stated)

7. Again, thinking about the next 12 months, are you expecting business to...?

1. Slow down
 2. Stay the same
 3. Grow or expand
 4. Other - **specify**
- F5 (Don't Know/Not Stated)

8. Using a scale of 1 to 5, where 1 is "not at all satisfied" and 5 is "very satisfied," how satisfied are you with the following:

1. Not at all satisfied
 - 2.
 - 3.
 - 4.
 5. Very satisfied
- F5 (Don't Know/Not Stated)

Financing and Operating Costs

- a) Access to financing
- b) Cost of labor
- c) Cost of land
- d) Cost of office space
- e) Cost of commercial space
- f) Cost of industrial space
- g) Transportation costs
- h) Municipal tax rates
- i) Provincial tax rates

Operations and Infrastructure

- a) Location
- b) Availability of office space
- c) Availability of commercial space
- d) Availability of industrial buildings
- e) Availability of land
- f) Communications and technology infrastructure
- g) Road infrastructure
- h) Access to customer base
- i) Access to suppliers
- j) Competition
- k) Local regulations and processes

Labour, Resources, and Community

- a) Quality of life
- b) Community growth
- c) Business support services

- d) Business to business (B2B) networking opportunities
- e) Business support organizations
- f) Availability of labor
- g) Availability of management staff
- h) Access to post-secondary education
- i) Access to professional development programs and training

9. Using a scale of 1 to 5, where 1 is “not at all satisfied” and 5 is “very satisfied,” how satisfied are you with the City of Lacombe, overall, as a place to operate a business?

- 1. Not at all satisfied
- 2.
- 3.
- 4.
- 5. Very satisfied
- F5 (Don't Know/Not Stated)

10. **[IF 1 for Q1A/for Home-Based Businesses]** Is your business your primary source of income?

- 1. Yes
- 2. No
- F5 (Don't Know/Not Stated)

11. **[IF 1 for Q1A/for Home-Based Businesses]** Are you interested in moving your business from home-based to a storefront?

- 1. Yes
- 2. No
- F5 (Don't Know/Not Stated)

12. **[ALL RESPONDENTS]** Have you worked with the City of Lacombe in the past 12 months through the operation of your business?

- 1. Yes
- 2. No
- F5 (Don't Know/Not Stated)

13. **[IF 1/YES to Q12]** Which departments have you worked with in the last 12 months?
1. Community and economic development
 2. Streets and roads
 3. Utilities and fleet
 4. Engineering
 5. Human Resources
 6. Financial Services
 7. Planning & development
 8. Parks and facilities
 9. Fire chief
 10. Communications
 11. Marketing
 12. Recreation and culture
 13. Computer and information systems
 14. Other - **specify**
- F5 (Don't Know/Not Stated)
14. **[IF 1/YES to Q12]** Using a scale of 1 to 5, where 1 is "not at all satisfied" and 5 is "very satisfied," how satisfied are you overall, with the City of Lacombe, in terms of conducting business-related operations?
1. Not at all satisfied
 - 2.
 - 3.
 - 4.
 5. Very satisfied
- F5 (Don't Know/Not Stated)
15. If curbside recycling is implemented in residential areas of Lacombe, would you prefer to: [SELECT ONE]
1. Arrange for your business recycling to be picked up by qualified vendors? OR
 2. Maintain the Wolf Creek Recycle Depot as a recycling drop-off station for commercial customers?

That's all of the questions I have. Thank you very much for your participation in this study, your feedback is greatly appreciated.