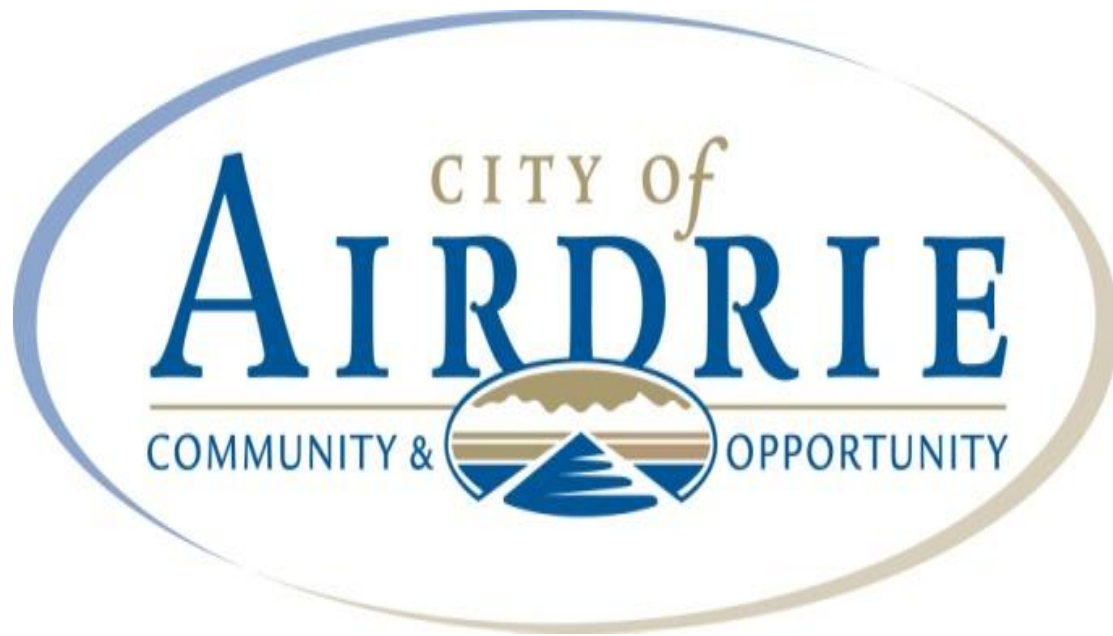




2018 Airdrie Business Satisfaction Survey

Presentation of Results

May 7, 2018

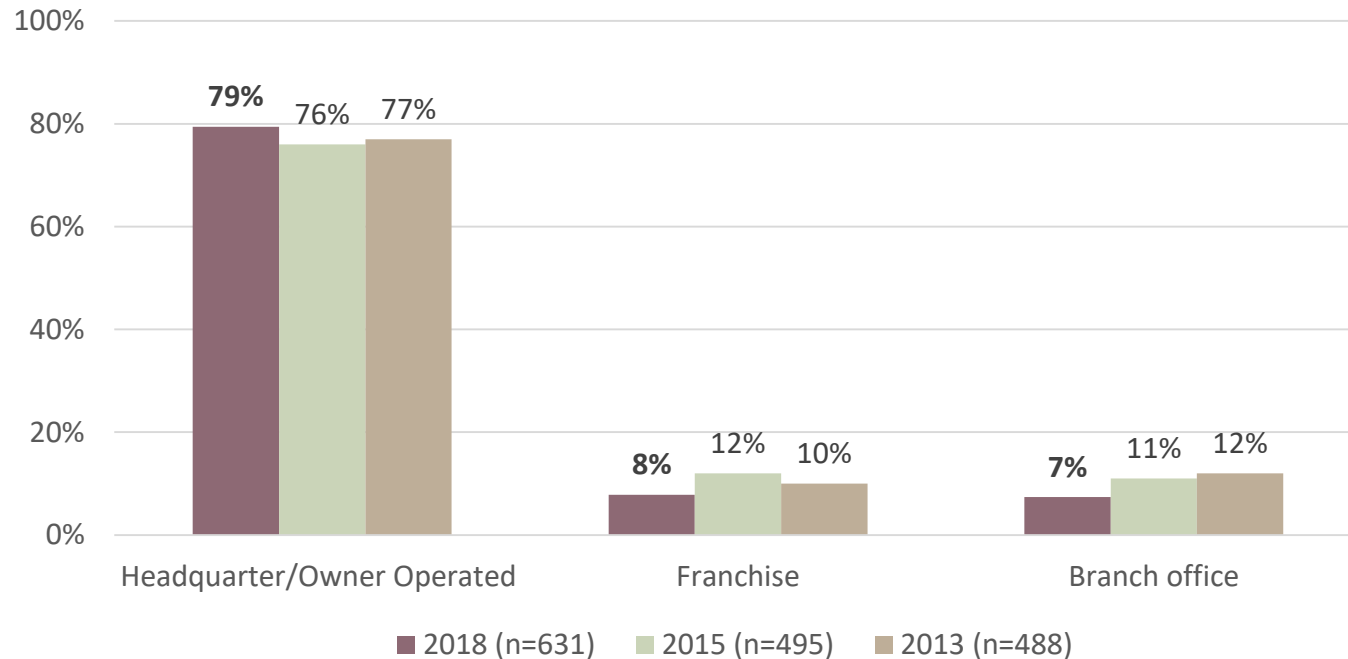
Banister Research Ltd.

Study Background & Methodology

A total of 631 surveys were completed via telephone (n=138) and web (n=493), from February 5th to March 2nd, 2018.

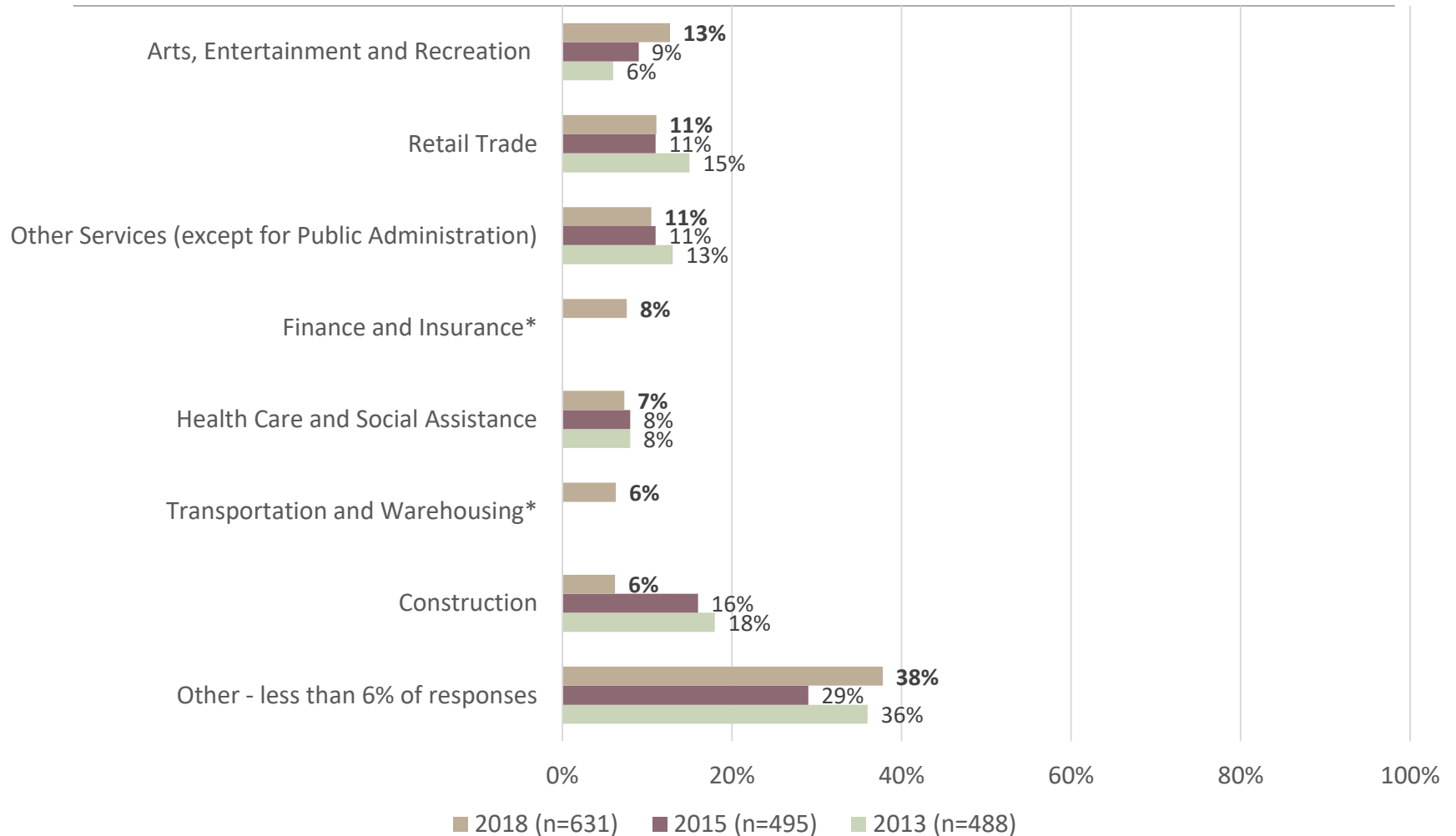
- City-wide results provide a margin of error no greater than +3.4% at the 95% confidence level or 19 times out of 20.
- 83% of respondents were Business Owners, 4% were CEOs, Presidents or Vice Presidents, and 8% were Primary Managers.
- 40% of respondents were from commercial businesses, while 60% were from home-based businesses.

Type of Business*



* Note: Each question was asked separately of respondents (i.e., “Is this business a Franchise?”; “Is this business a Headquarter/Owner-operated?”; “Is this business a Branch Office.”) Respondents may have said ‘yes’ to more than one category; as a result, percentages may not total to 100%

Business Sector



*New to the 2018 survey

Issues Facing Airdrie's Economy

Top Responses:

- Managing growth of the community – 55%;
- Infrastructure (roads, water, etc.) – 54%;
- Customer leakage outside of Airdrie – 29%;
- City of Airdrie processes and policies – 25%; and
- Competition within Airdrie – 23%.

n=631

7% of respondents were unable to or did not provide a response.

Issues Facing Airdrie's Economy

Commercial Businesses (n=252)

Top Responses:

- Managing growth of the community – 58%;
- Infrastructure (roads, water, etc.) – 54%;
- Customer leakage outside of Airdrie – 29%;
- Competition within Airdrie – 26%;
- City of Airdrie processes and policies – 25%; and
- Availability of skilled labour – 23%.

Home-Based Businesses (n=379)

Top Responses:

- Managing growth of the community – 54%;
- Infrastructure (roads, water, etc.) – 54%;
- Customer leakage outside of Airdrie – 28%
- City of Airdrie processes and policies – 25%;
- Competition within Airdrie – 21%;
- Access to affordable housing – 17%.

Issues Facing Airdrie's Businesses Today

Top Responses:

- Cost of office/commercial/industrial space – 36%;
- Cost of advertising – 28%;
- Taxes – 26%;
- Availability of retail/commercial/industrial space – 20%; and
- Availability of labour – 19%.

n=631

10% of respondents were unable to or did not provide a response.

Provincial Perspective - Issues Facing Airdrie Businesses Today

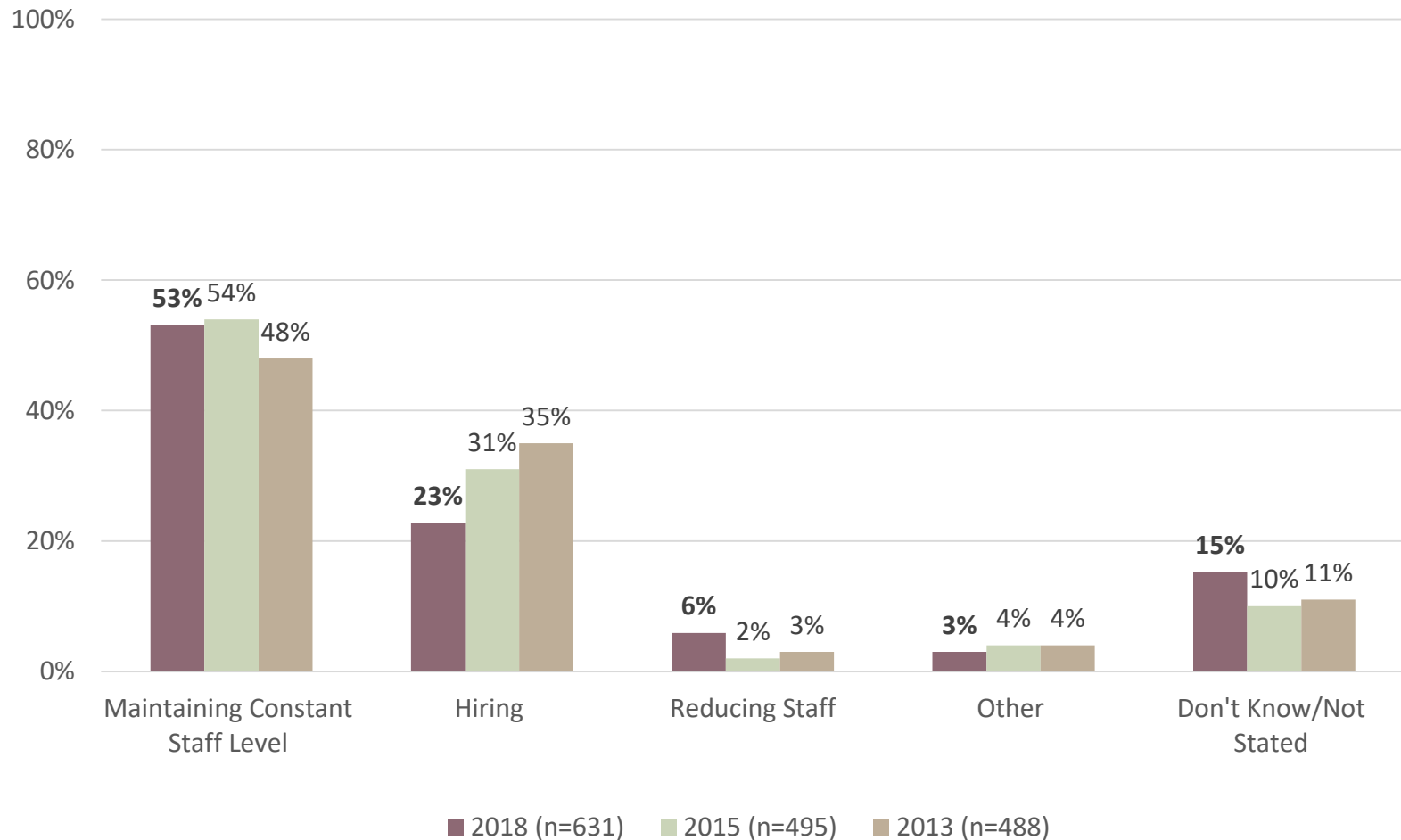
Top Responses:

- Taxes – 56%;
- Carbon Tax – 44%;
- Cost of Labour – 39%;
- Regulations – 27%; and
- Availability of labour –17%.

n=631

17% of respondents were unable to or did not provide a response.

Workforce Situation for the Next Year

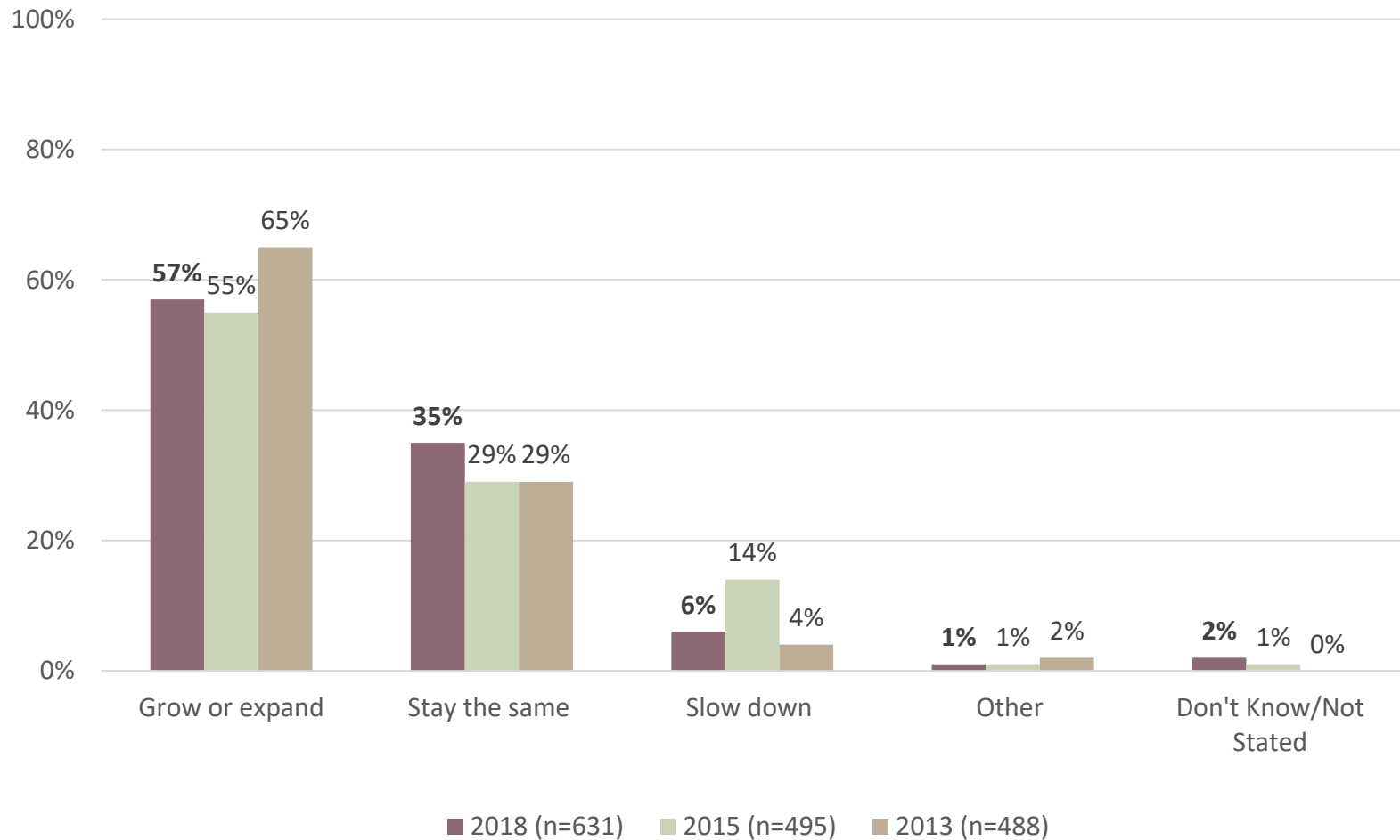


Challenges with Recruitment and Retention of Staff

- Business were asked if they are having any challenges with recruitment and retention of staff:
 - No (77%, versus 69% in 2015)
 - Yes (18%, versus 26% in 2015)*:
 - ◆ Difficult to find skilled, qualified or certified staff (9%)

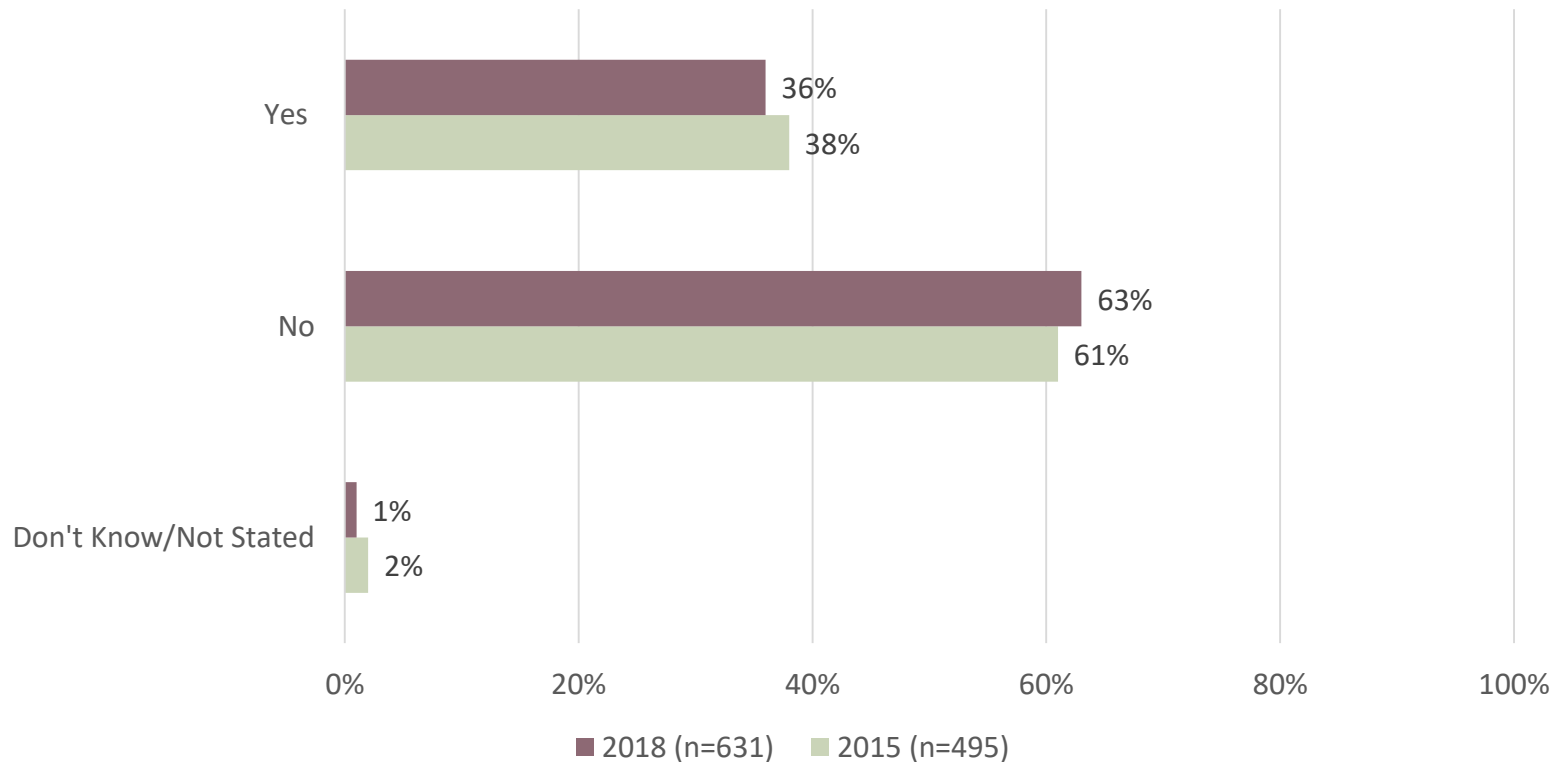
*Multiple responses

Workload for the Next Year



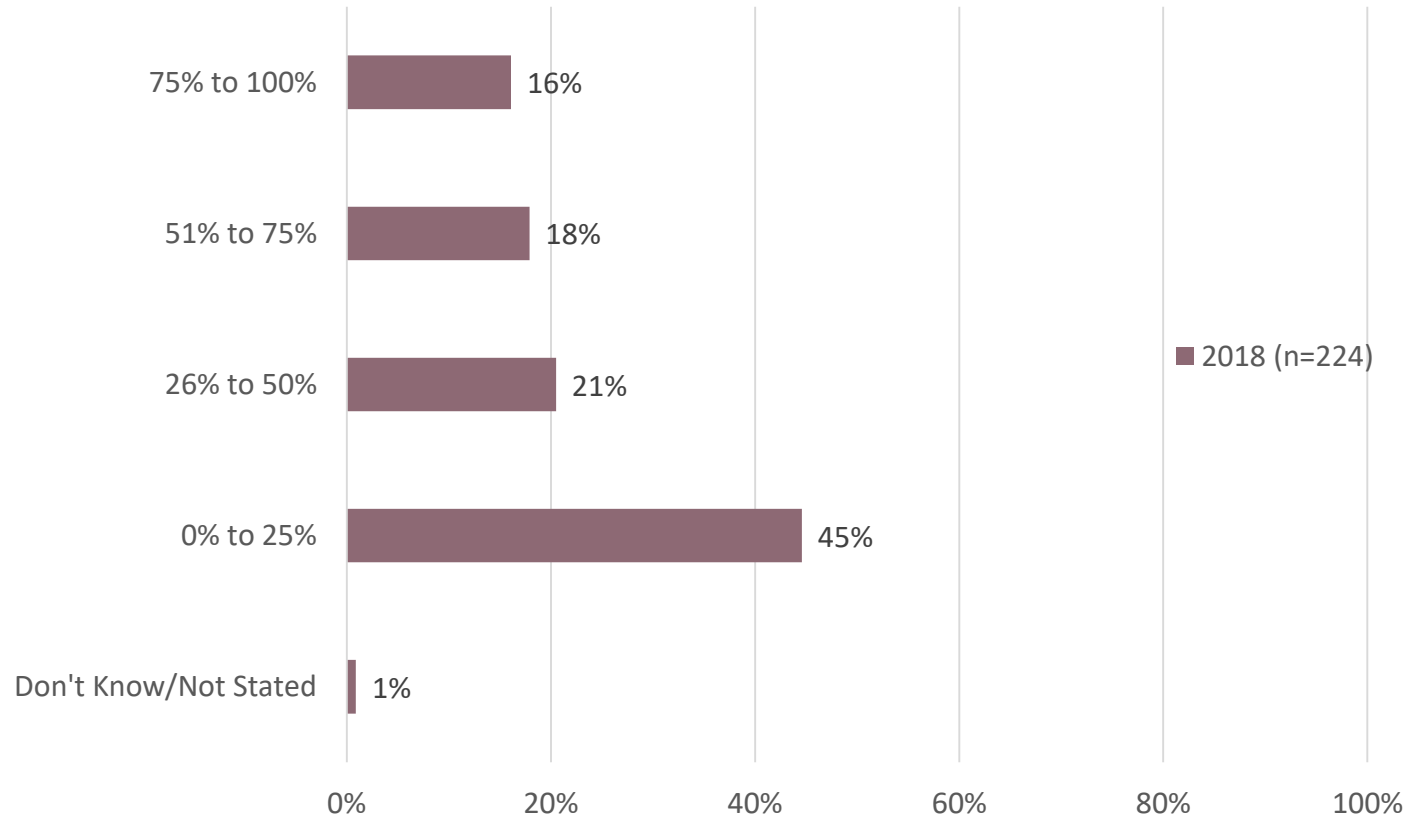
Selling Outside of the Calgary Region

Is your business currently selling products or services outside of the Calgary region?



Selling Outside of the Calgary Region

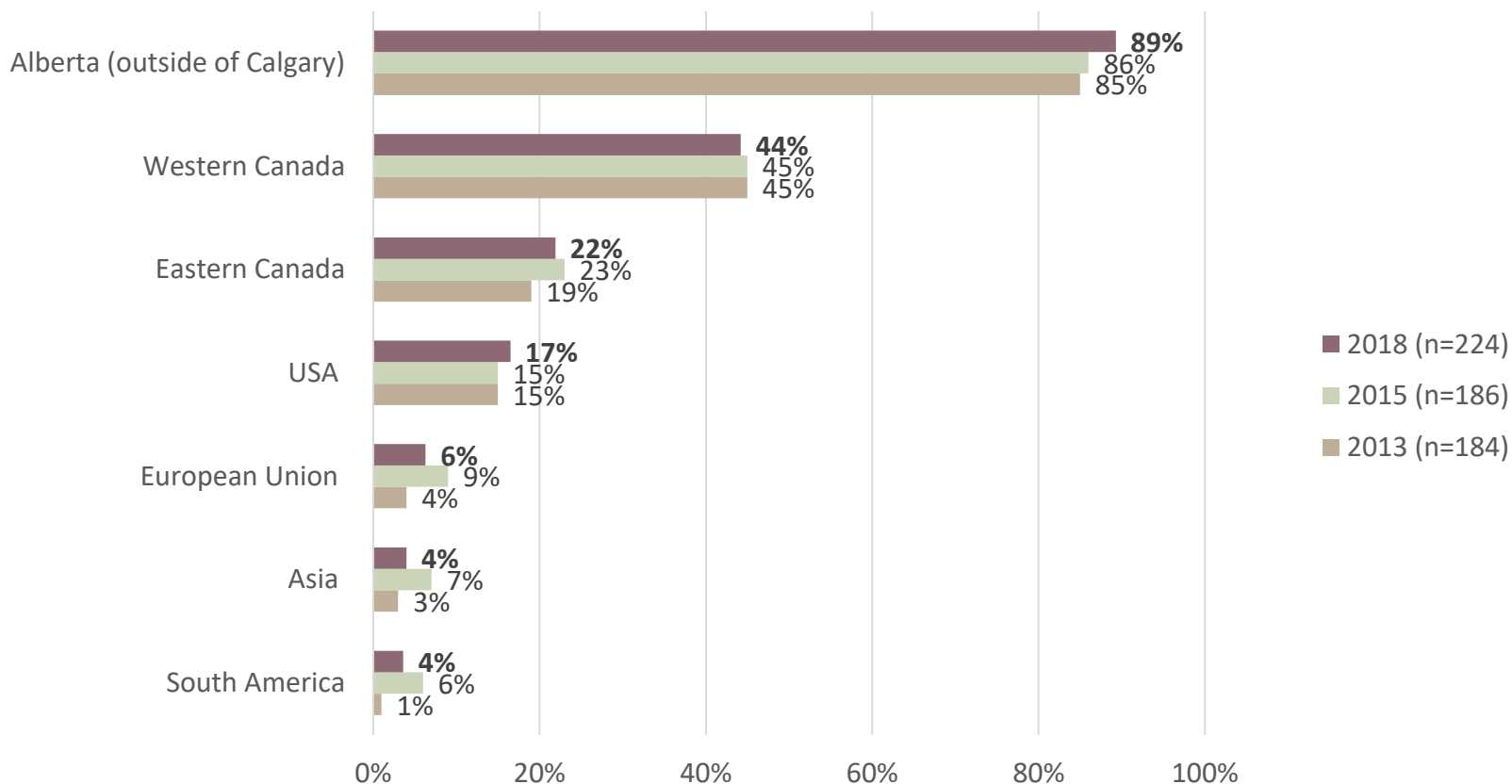
What percentage of sales are outside of the Calgary region?*



* Question new to 2018

Selling Outside of the Calgary Region

Where are you selling your products?*

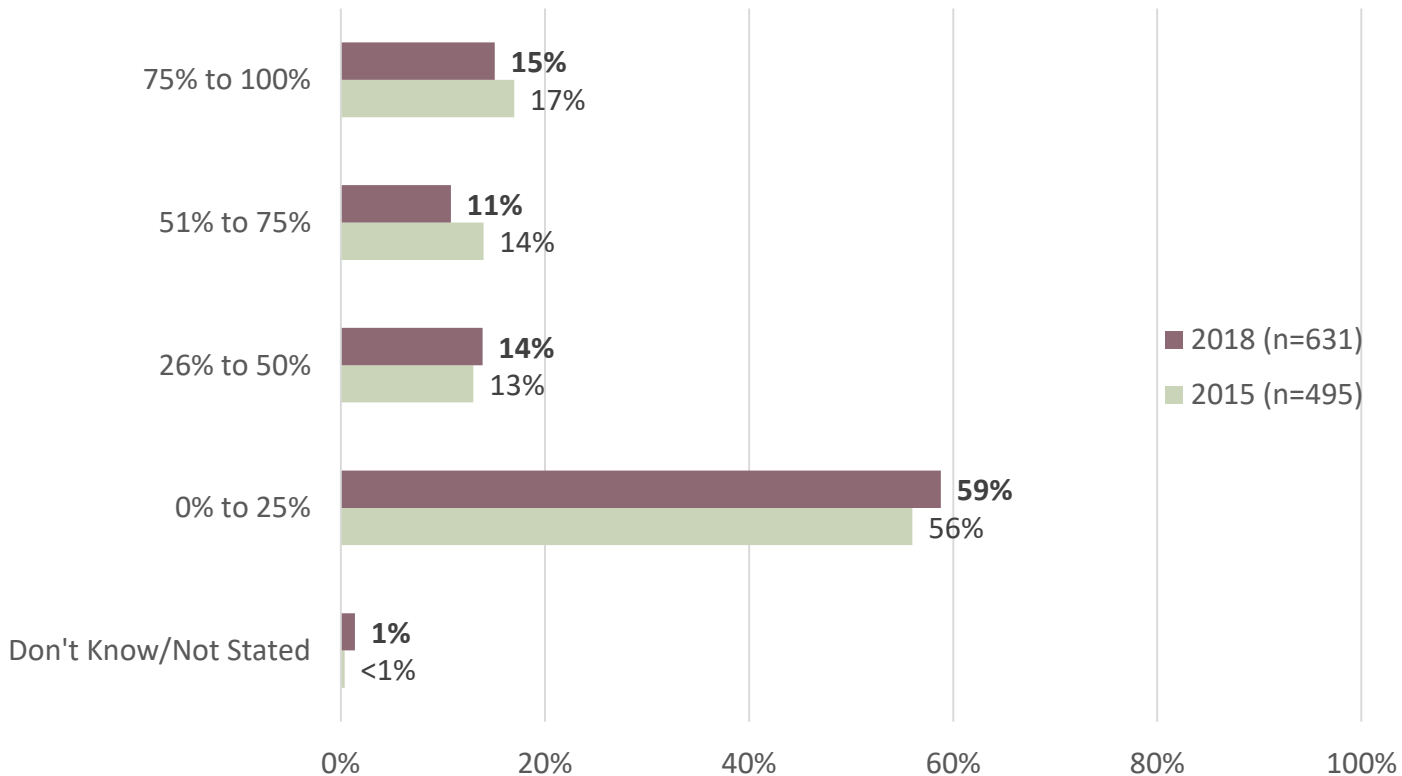


* Multiple responses

Base: Respondents that currently sell product/services outside of the Calgary region

Inputs Purchased in Airdrie

What percentage of inputs - raw materials, supplies, goods and services - does your business purchase locally, in Airdrie?*



* Question new to 2015

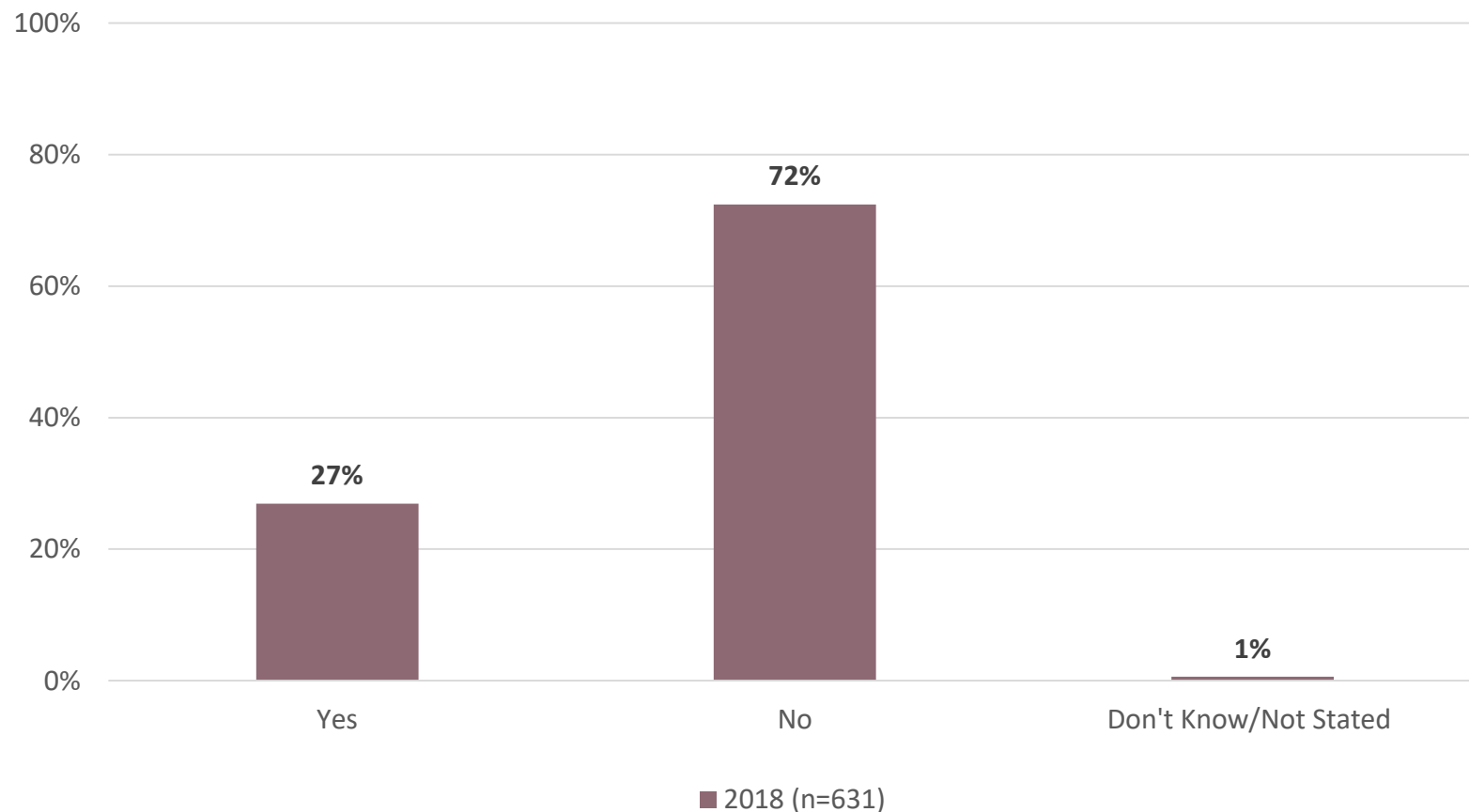
Inputs Purchased in Airdrie – Barriers*

- When asked what barriers are preventing businesses from purchasing more materials from within the City of Airdrie, top responses included:
 - Availability – 62%;
 - Price/Cost – 23%;
 - Relationship with existing supplier(s) outside – 19%; and
 - None/no barriers – 19%.

*Multiple responses

Online Sales

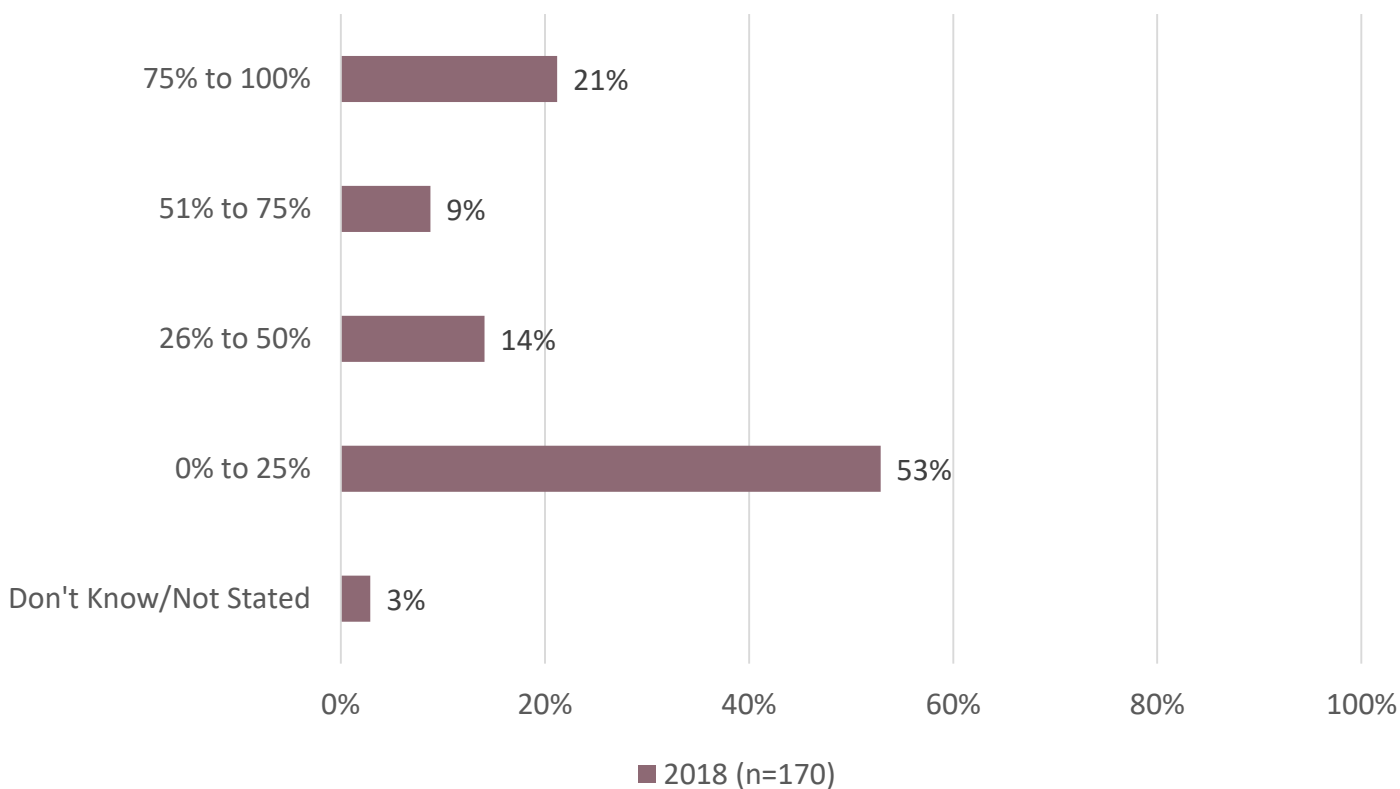
Does your business sell goods/services online?*



* Question new to 2018

Online Sales

What percentage of sales take place online?*

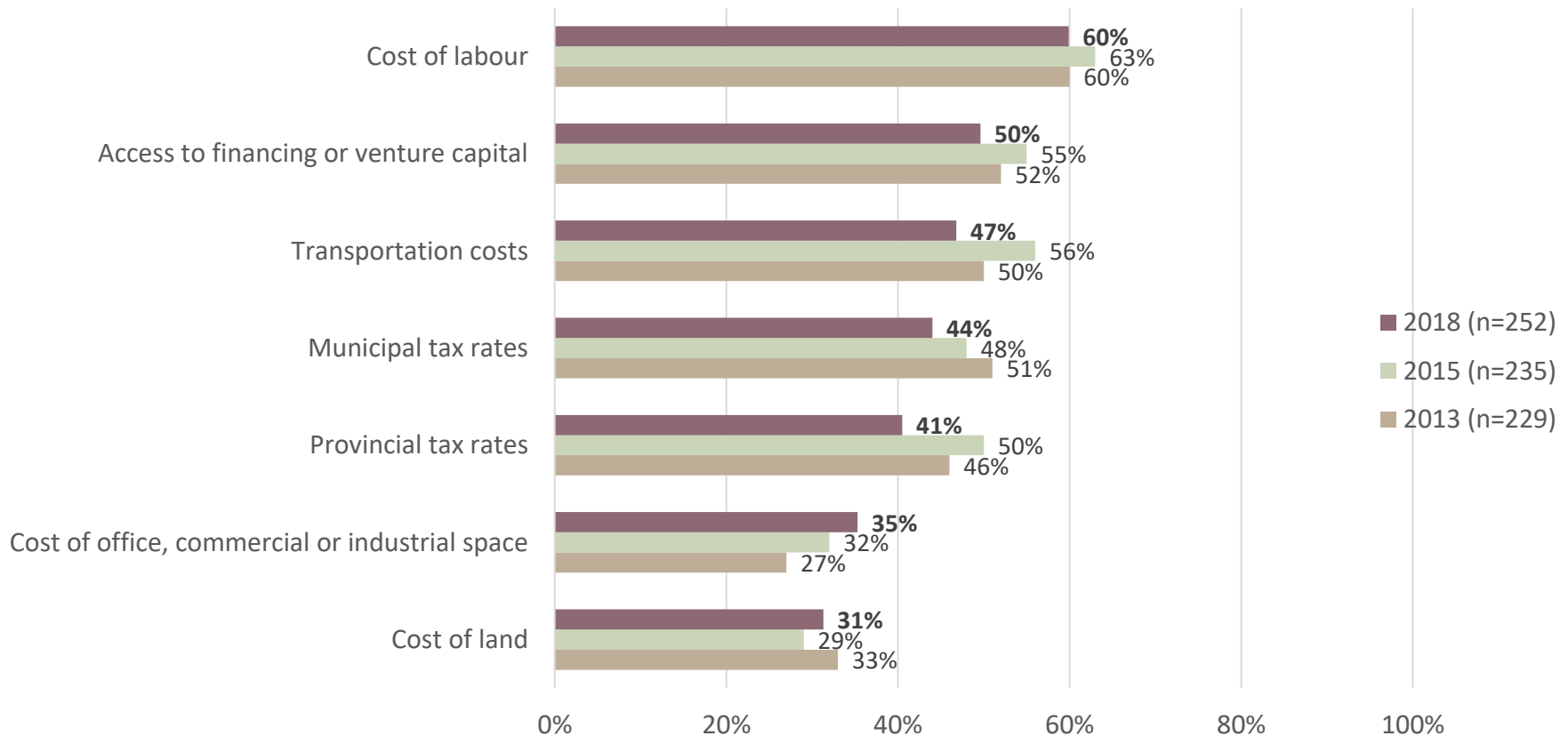


* Question new to 2018

Base: Respondents whose business sells goods/services online

Satisfaction with Airdrie as a Place to do Business - Commercial*

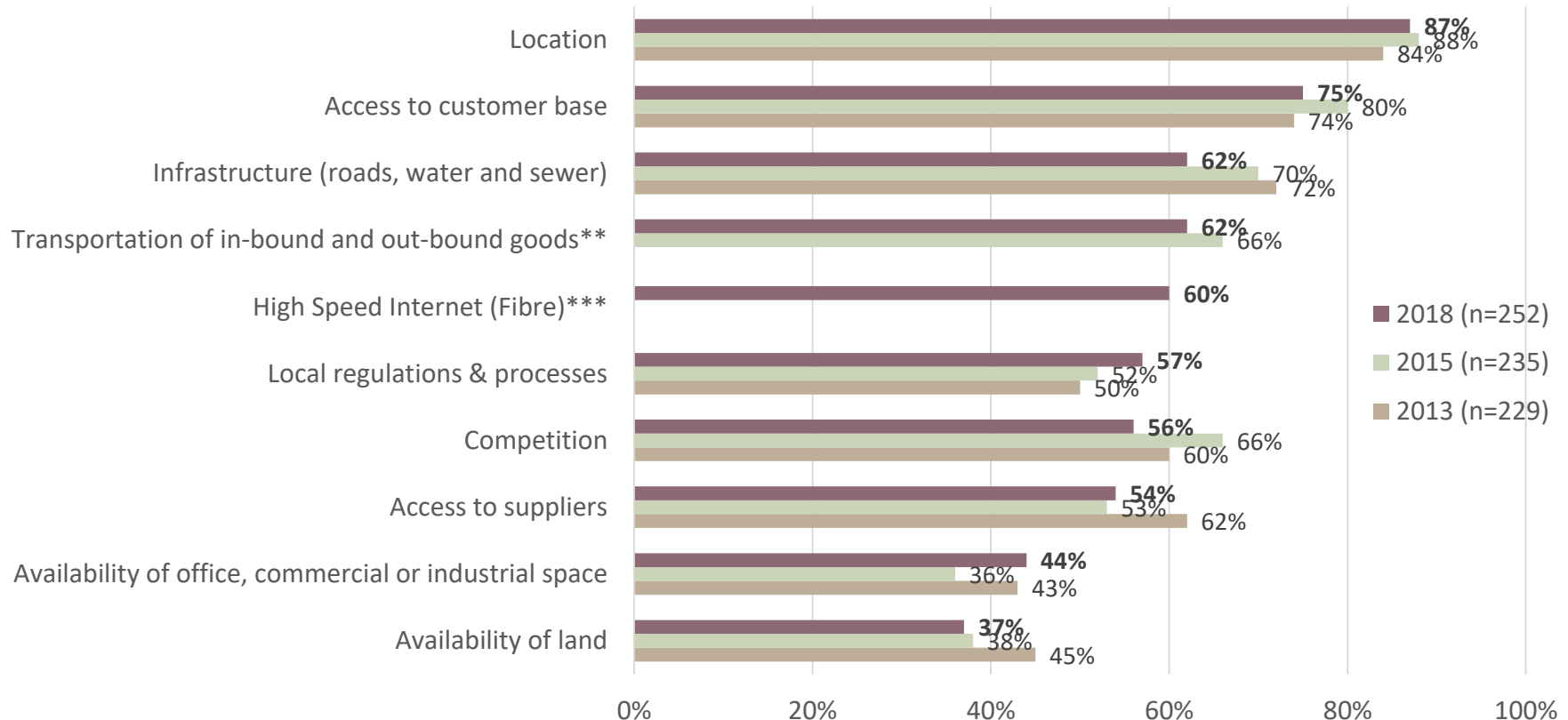
Financing & Operating Costs*



* Percent of respondents who rated each factor as excellent, very good or good
Base: Commercial businesses

Satisfaction with Airdrie as a Place to do Business - Commercial*

Operations and Infrastructure



*Percent of respondents who rated each factor as excellent, very good or good

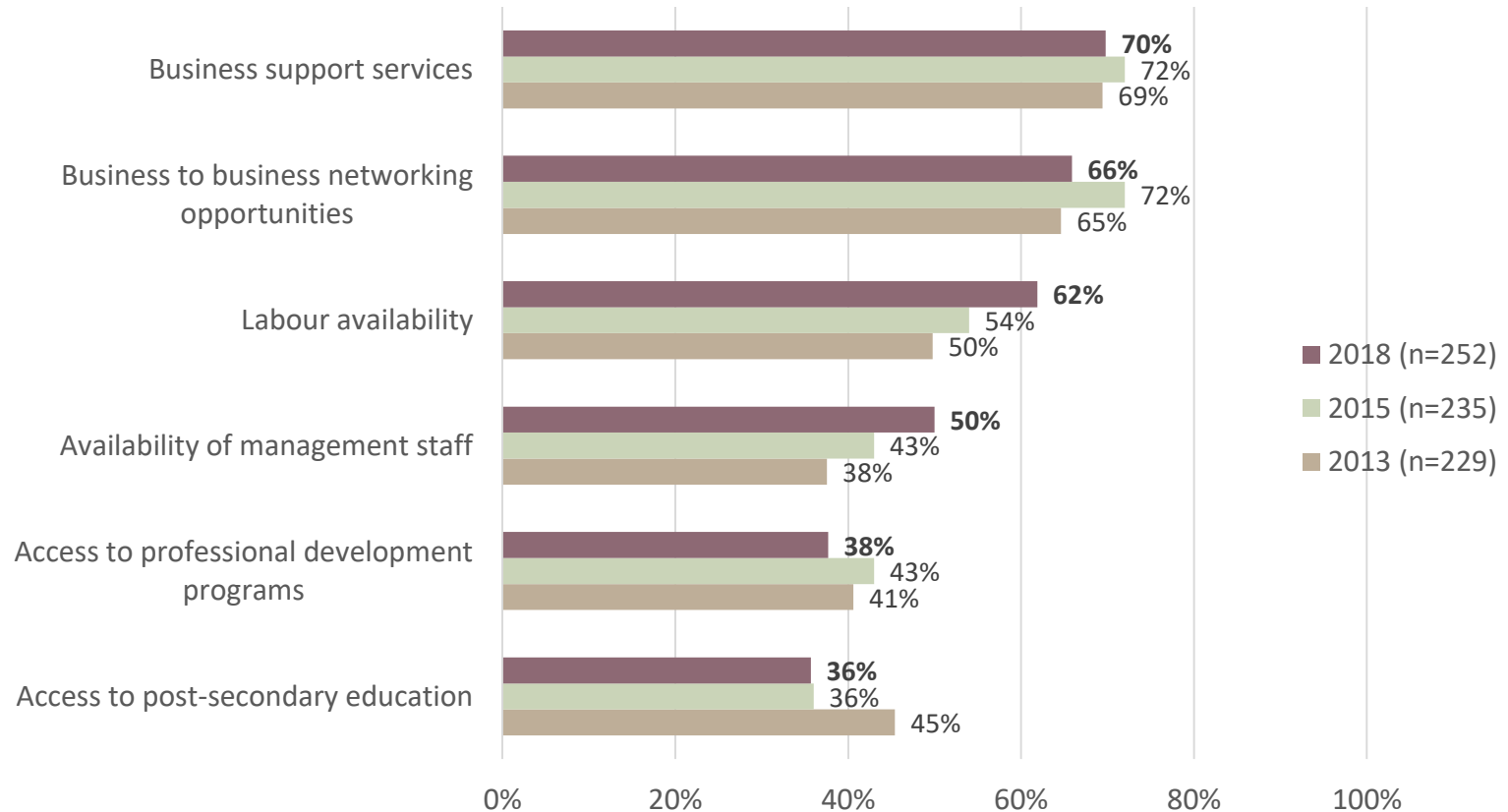
**New to the 2015 survey

*** New to the 2018 survey

Base: Commercial businesses

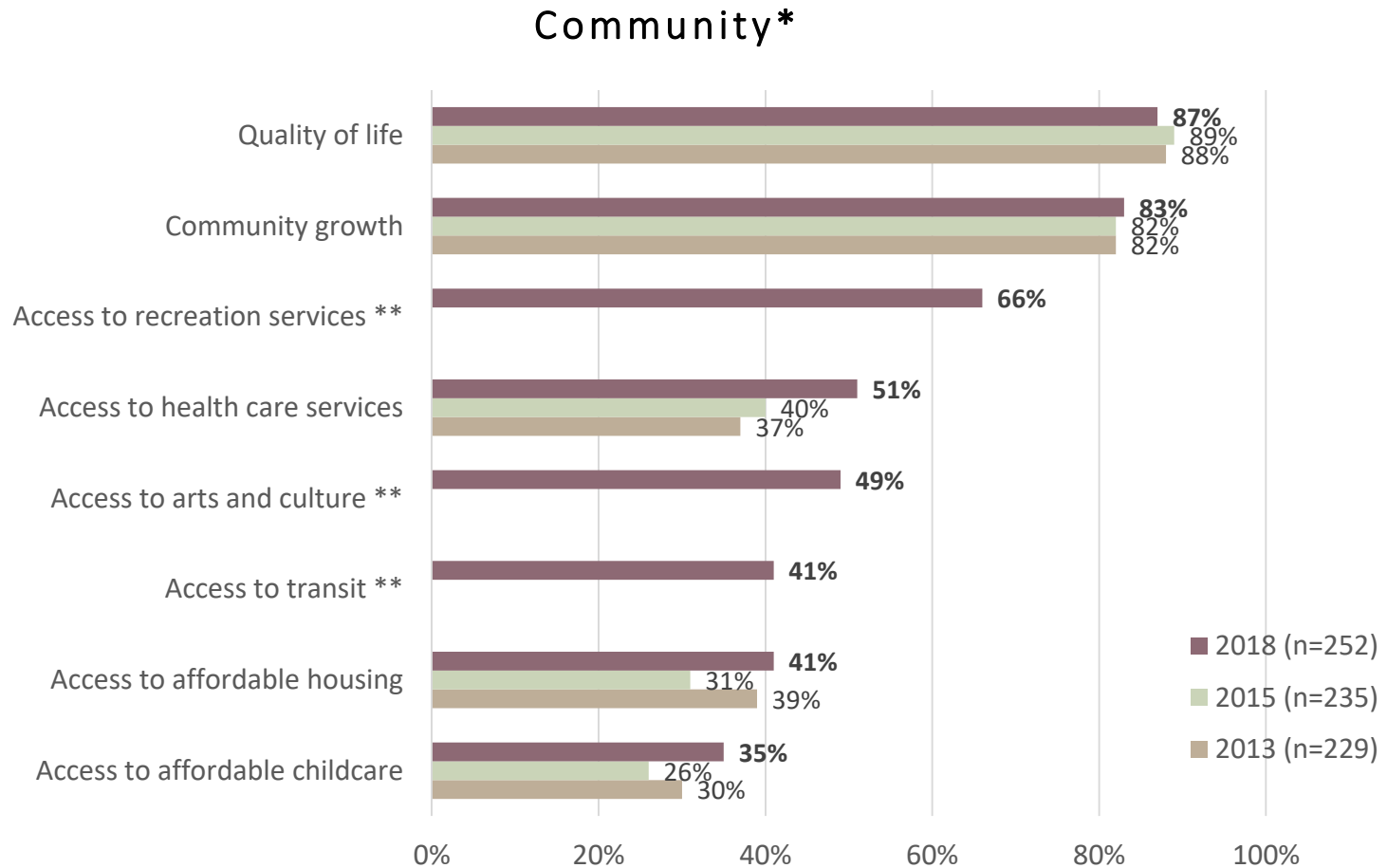
Satisfaction with Airdrie as a Place to do Business - Commercial*

Labour and Resources*



* Percent of respondents who rated each factor as excellent, very good or good
Base: Commercial businesses

Satisfaction with Airdrie as a Place to do Business - Commercial*

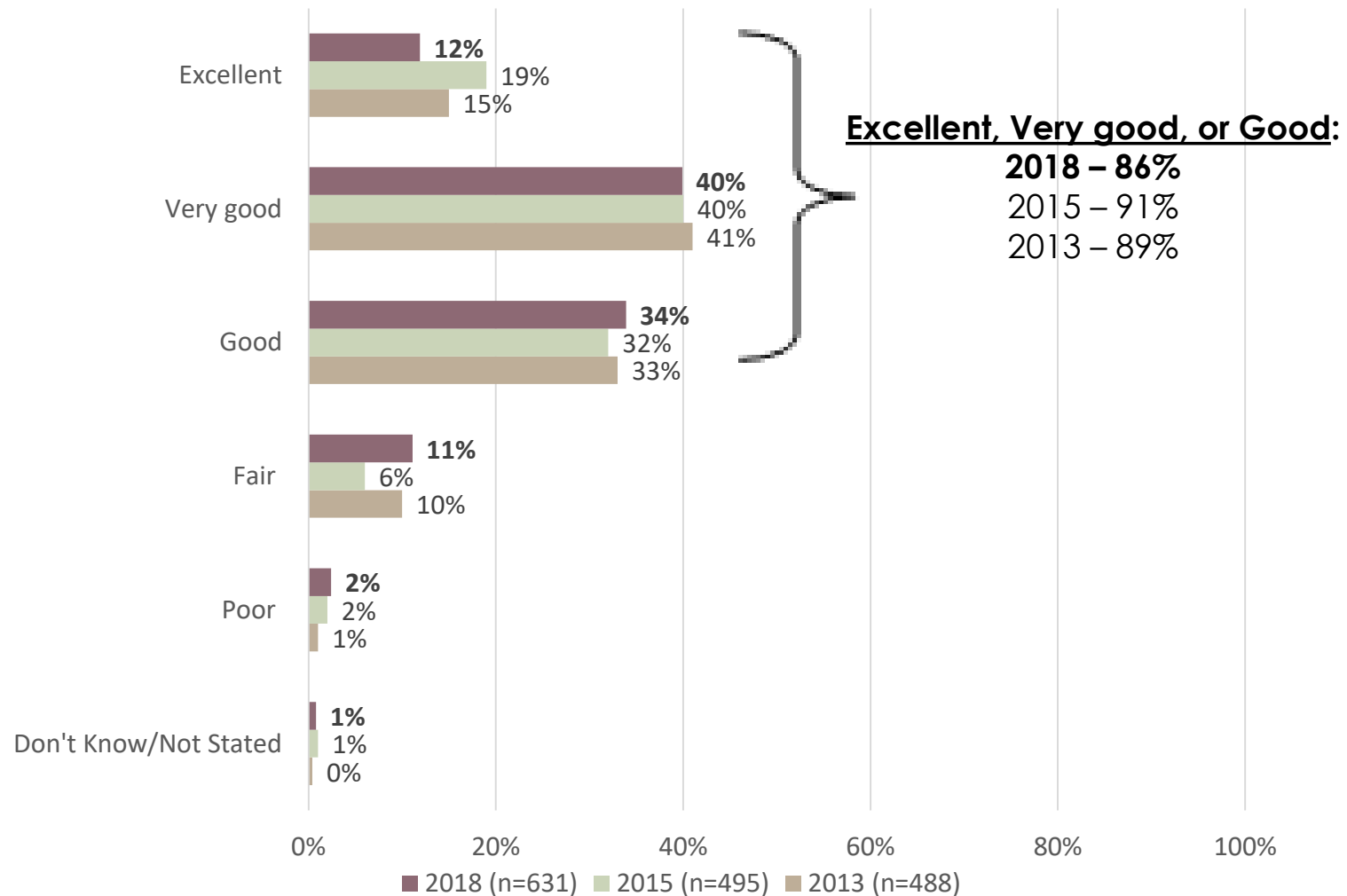


* Percent of respondents who rated each factor as excellent, very good or good

** New to the 2018 survey

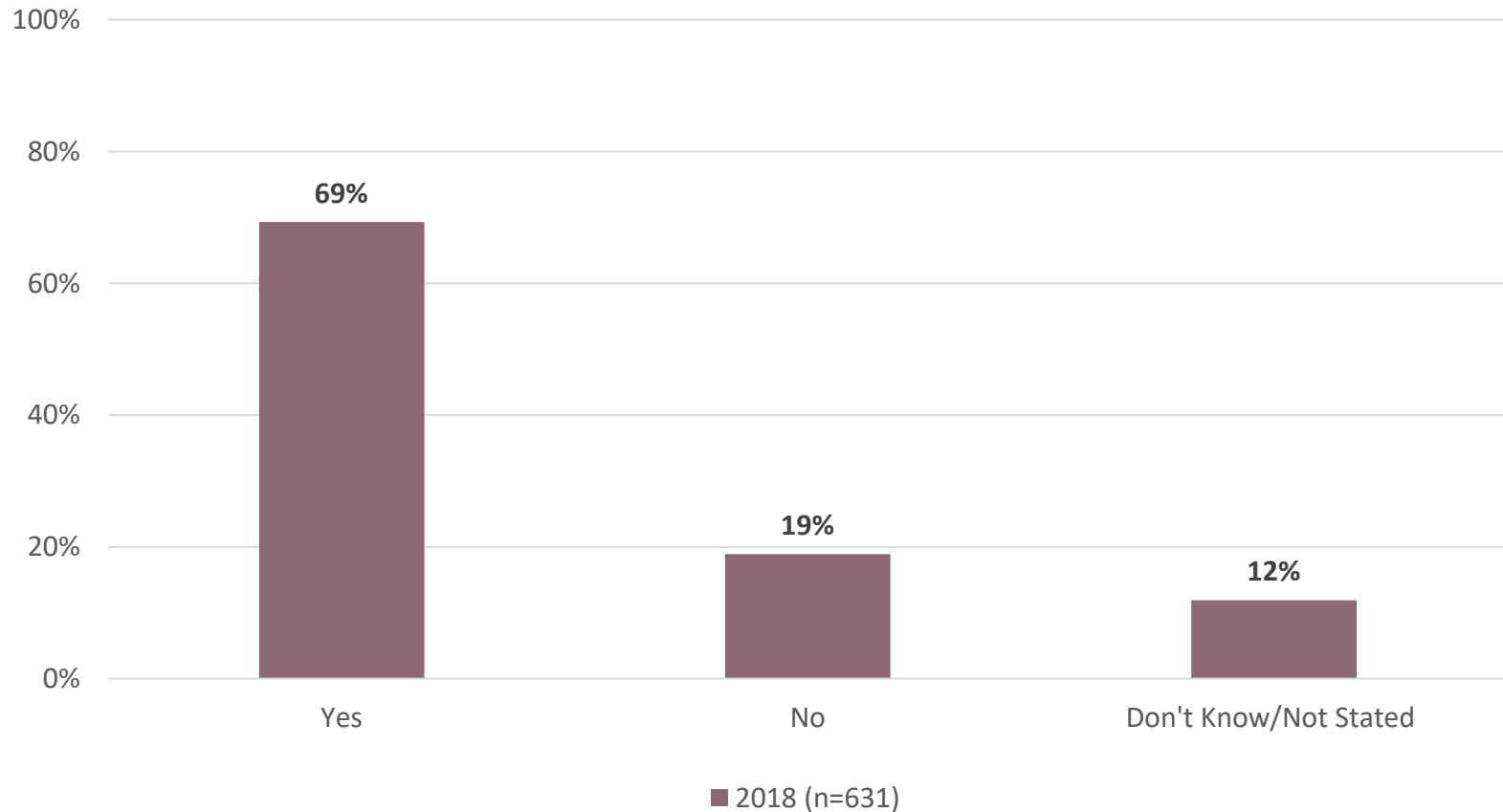
Base: Commercial businesses

Overall Satisfaction with Airdrie as a Place to Operate a Business



Selecting Airdrie for Business

When selecting a location for your business, was the City of Airdrie your first choice?*



* Question new to 2018

Selecting Airdrie for Business

Respondents who were considering other locations (n=119) most commonly cited the following reasons for considering other locations for business:

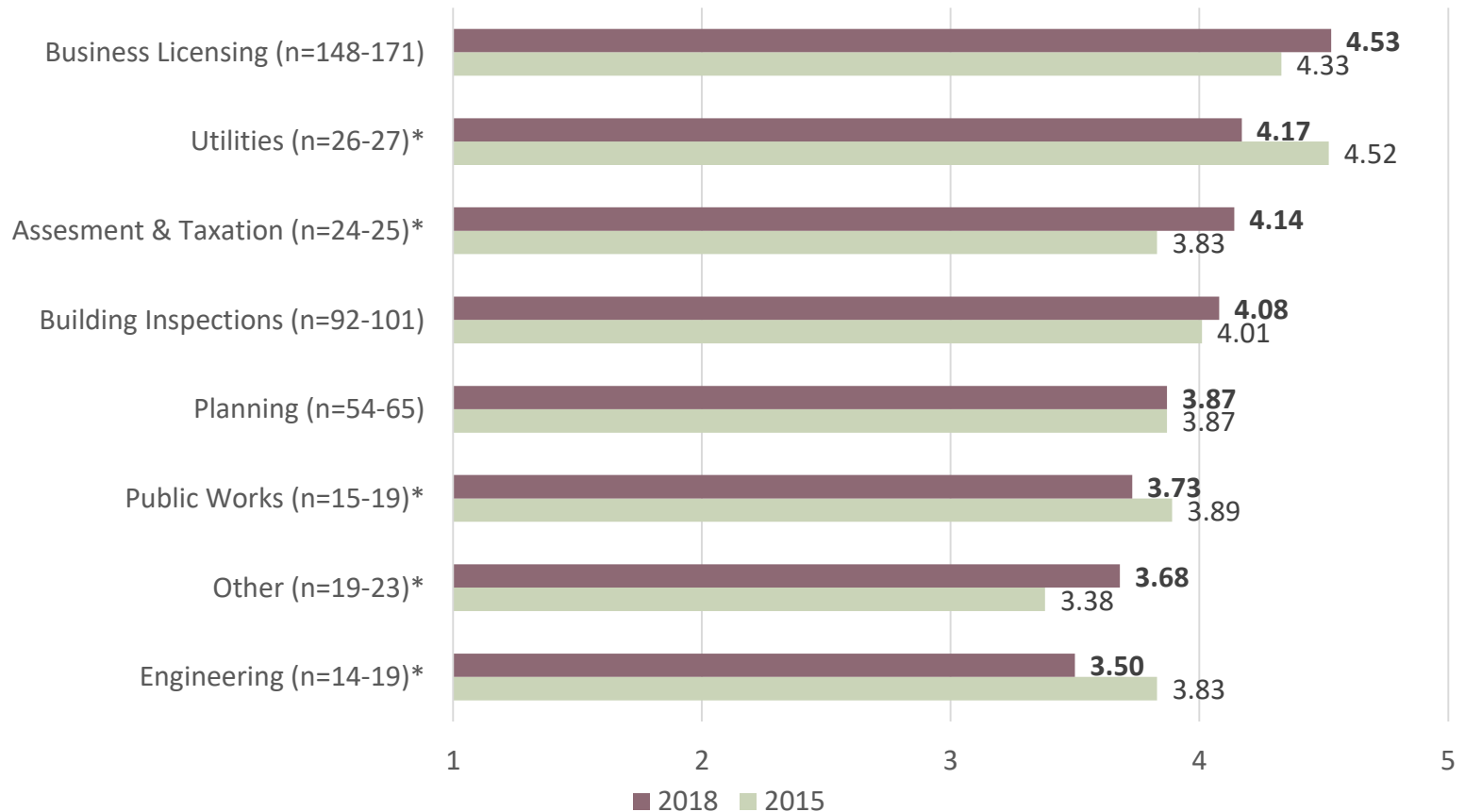
- Large customer base/target market/highly populated area (41%);
- Close proximity to my home/where I live (17%); and
- Availability of office/business space (7%).

Base: Respondents whose first choice was not Airdrie when selecting a location for their business

Working with City of Airdrie Departments

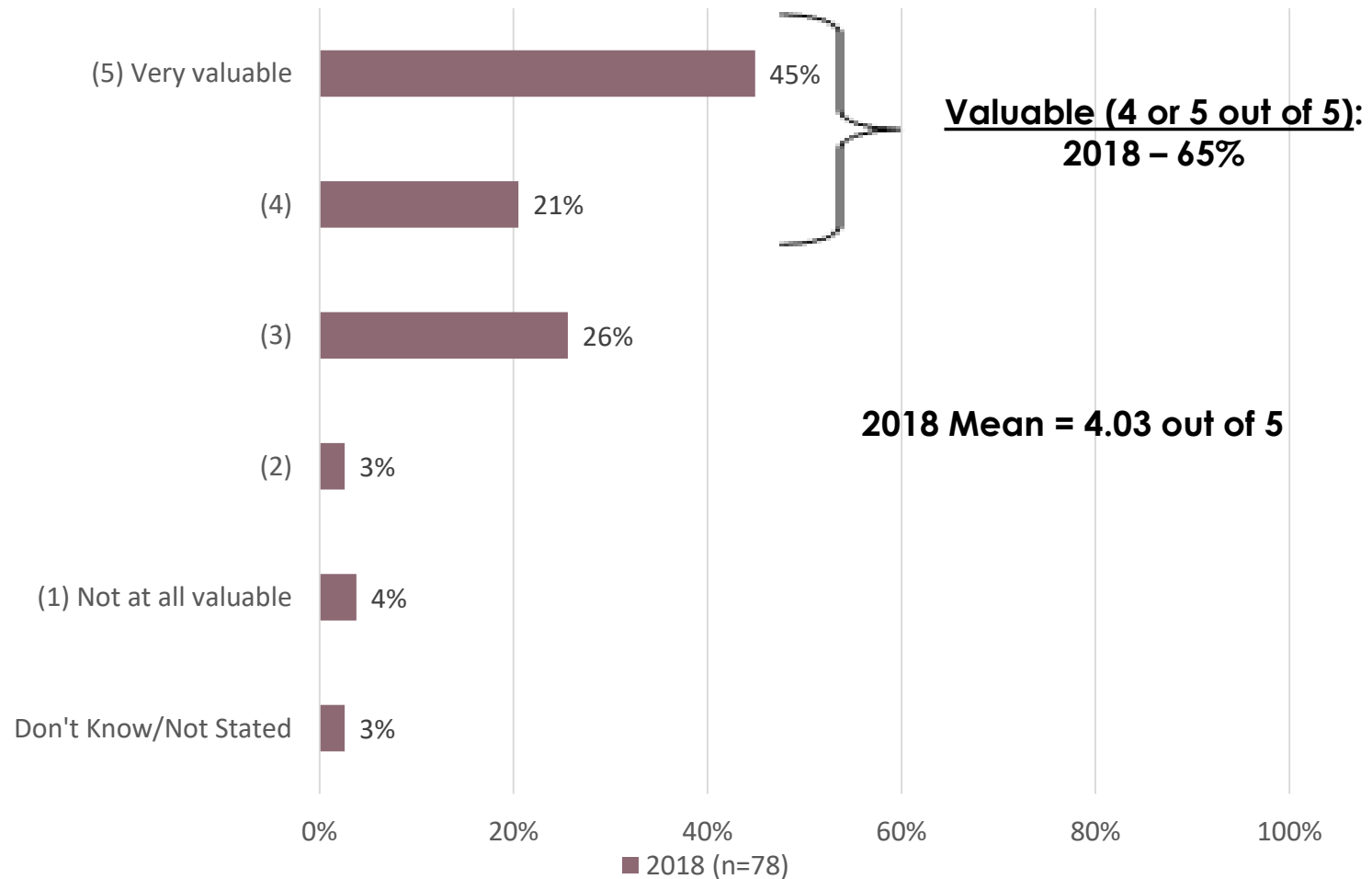
- Thirty-seven percent (37%) of respondents had worked with a City of Airdrie process or department related to their business over the last 2 years, a significant decrease from 45% in 2015.
- Respondents that had worked with a City of Airdrie department in the last year (n=234) were asked to identify which department it was. The most frequently used departments included:
 - Business Licensing (73%);
 - Building Inspections (43%);
 - Planning (28%); and
 - Utilities (12%).

Mean level of Satisfaction for each City of Airdrie Department: Customer Service



* Use caution interpreting results when n<30
Scale: 1="not at all satisfied"; 5="very satisfied"

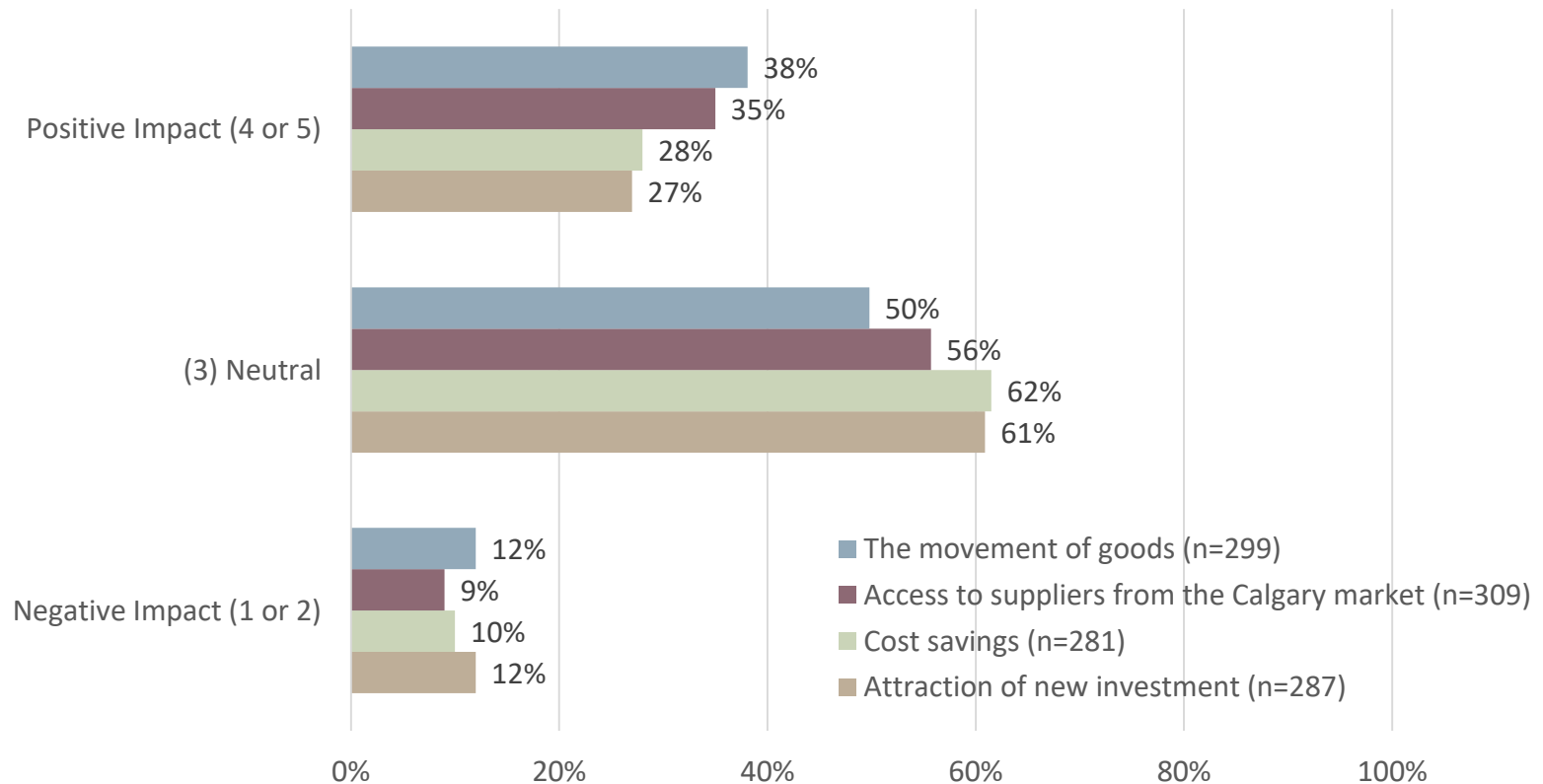
Value of Airdrie Economic Development Department



Base: Respondents who have accessed products and services offered by the Airdrie Economic Development department

Impact of Weigh Scale Relocation

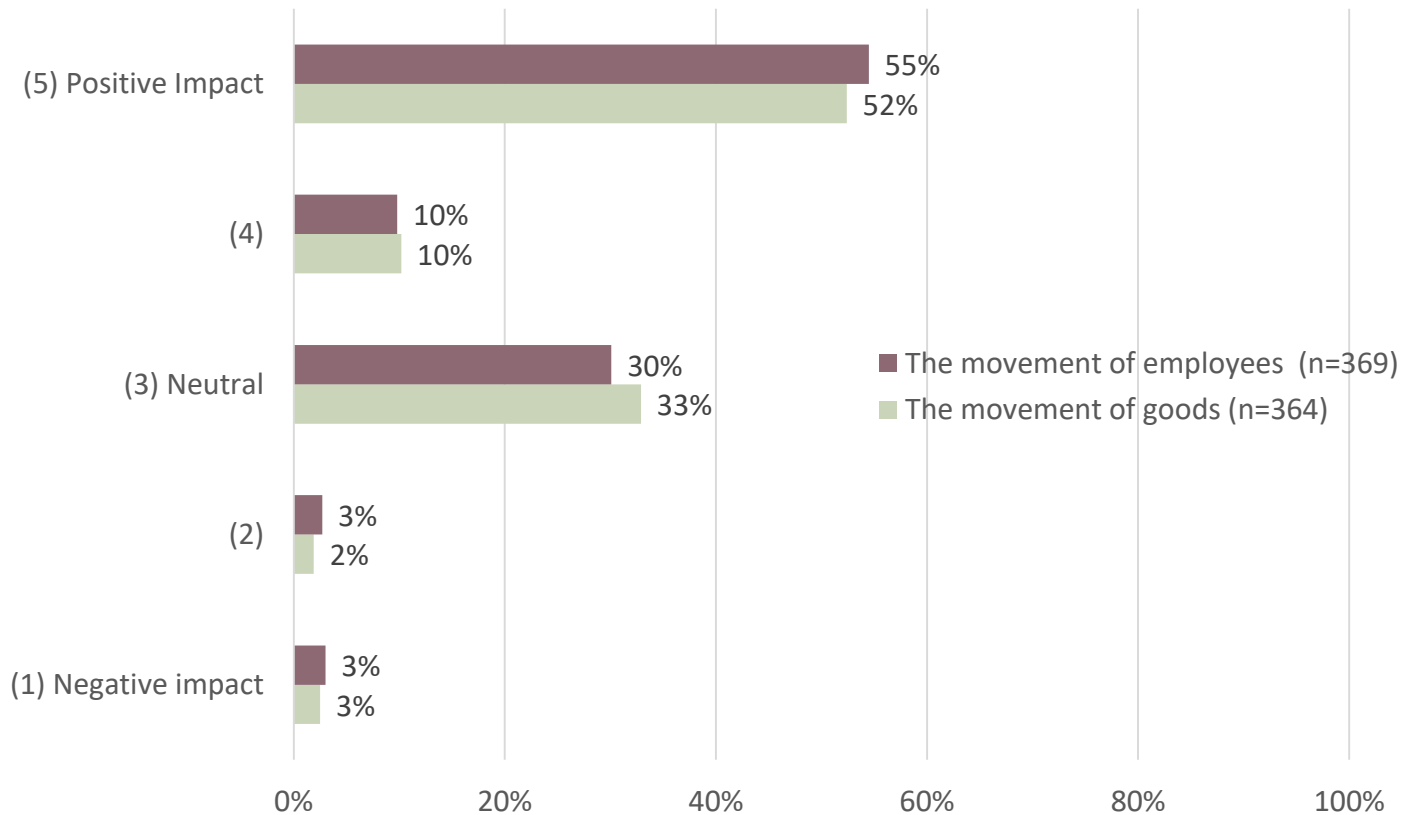
When asked to rate the impact of relocating the weigh scale, currently located between Airdrie and Balzac, to north of Airdrie on the QEII, respondents provided the following ratings:



Base: Excluding "Don't Know/Not Stated/Not Applicable" responses

Impact of Partial Interchange

How would you rate the impact of a partial interchange at 40th avenue (1.6 km south of Yankee Valley Blvd), specific to your business for...?



Base: Excluding "Don't Know/Not Stated/Not Applicable" responses

Home Based Businesses

- 42% of home-based businesses indicated this was their primary source of income
- 47% (a significant increase from 26% in 2015) of home-based businesses were interested in moving to a store-front location
 - 5% in the next year
 - 16% in 1 to 2 years
 - 22% in 3 to 5 years
 - 4% in 6 or more years
- Respondents interested in moving their business from their home to a store front (n=179) were interested in the following spaces:
 - Office space (54%)
 - Commercial space (28%)
 - Industrial space (5%)
 - Incubator (7%)

Satisfaction with Airdrie as a Place to do Business – Home Based*

Top Responses:

- Quality of life – 88%;
- Location – 81%;
- Community Growth – 81%;
- Access to Customer Base – 71%; and
- High Speed Internet – 65%.

n=379

*Percent of respondents who rated each factor as excellent, very good or good

Satisfaction with Airdrie as a Place to do Business – Home Based*

Lowest Responses:

- Availability of land – 27%;
- Availability of affordable childcare – 26%;
- Availability of office, commercial, or industrial space – 25%;
- Cost of land – 24%; and
- Cost of office, commercial, or industrial space – 16%.

n=379

*Percent of respondents who rated each factor as excellent, very good or good