



Strathcona County  
Triage BR&E Report

August 2024



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# Overview



## Background

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- Strathcona County completed a business satisfaction survey to understand how to best support local businesses. 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.
- The survey was commissioned to engage the broader business community, while also allowing for the identification of potential expansion or retention opportunities for follow-up on a business-by-business basis.

# Overview



## Methodology

---

- A mixed-methodology survey was conducted via phone and email using Strathcona County's business directory. A total of 401 businesses were reached and the survey response rate was 14%.
- This scientific approach ensures that the results have a high level of accuracy (with a  $\pm 4.9\%$  margin of error at a 95% confidence level) and statistically represents the business community in the region.

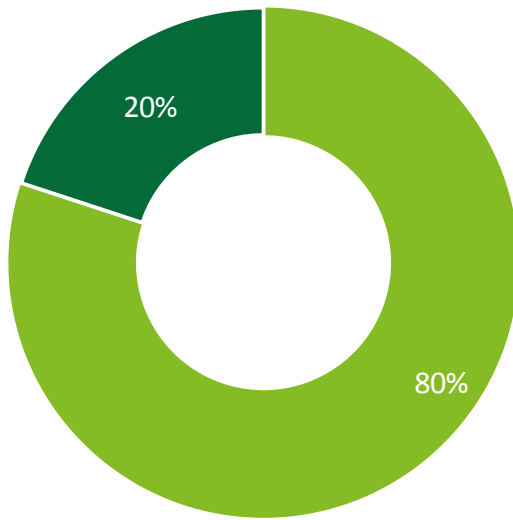


# Business Community Firmographics

# Firmographics



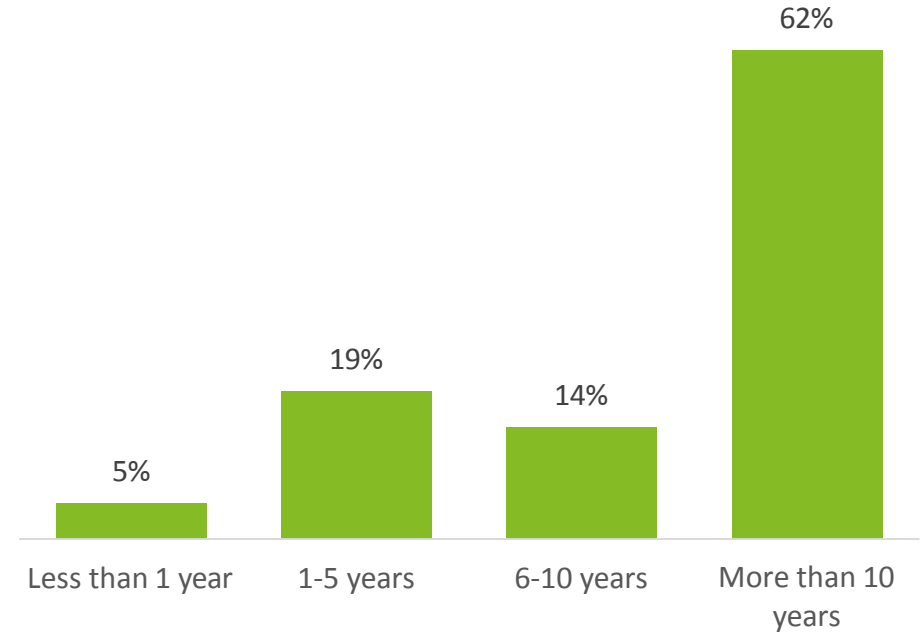
## Business Type (n=401)



- Locally Owned and Operated
- Externally Owned and Operated



## Years Operating in the Community (n=401)



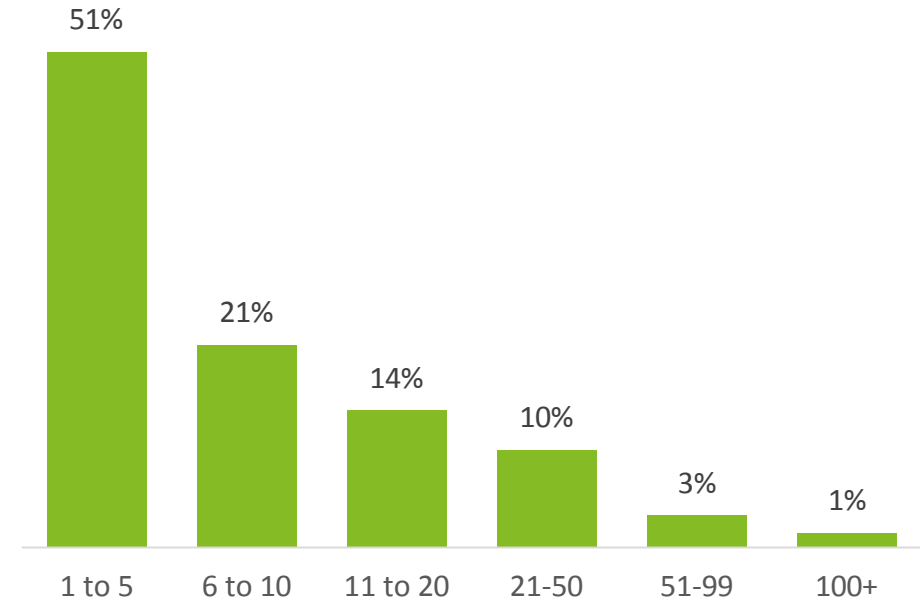
# Firmographics



## Sector (n=401)



## Number of Employees (n=401)

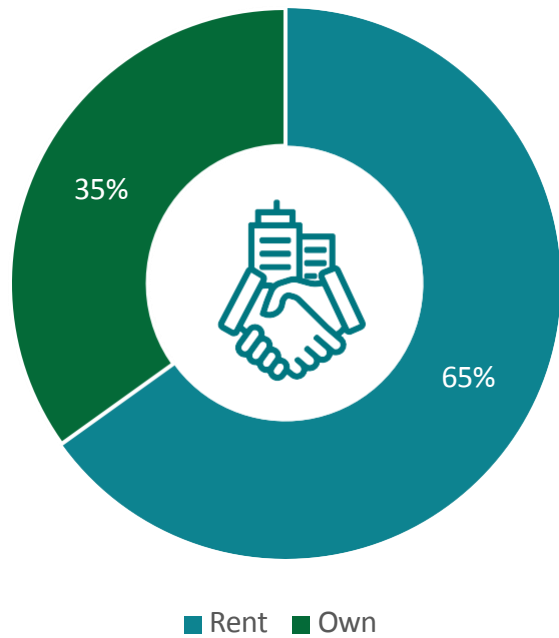




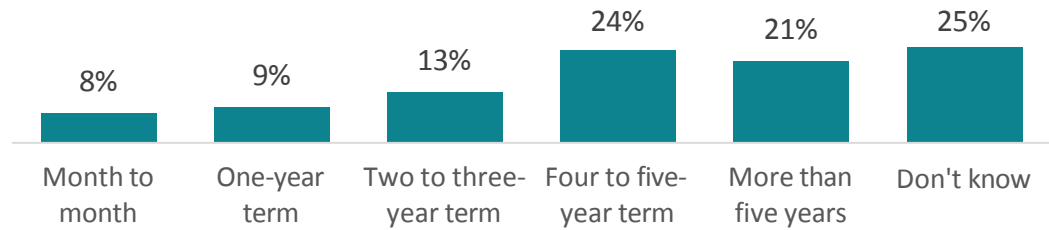
# Firmographics



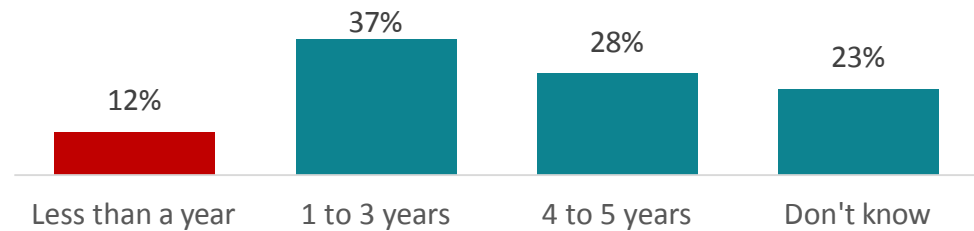
## Own or Rent Business Property? (n=384)



### Term of Lease (n=250)



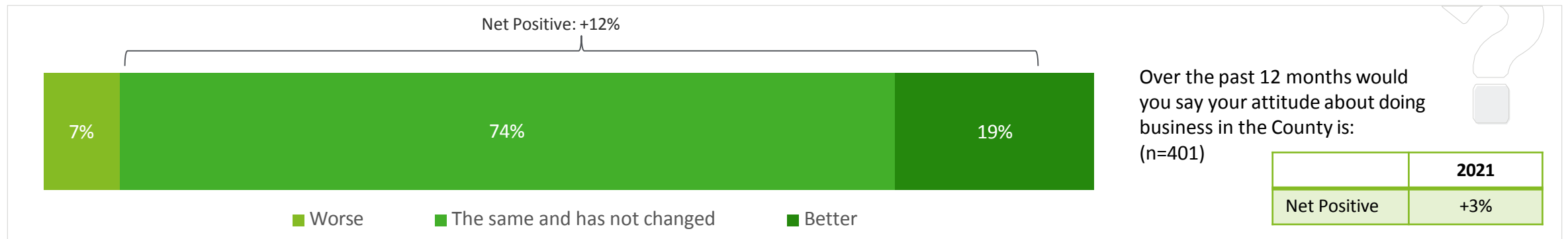
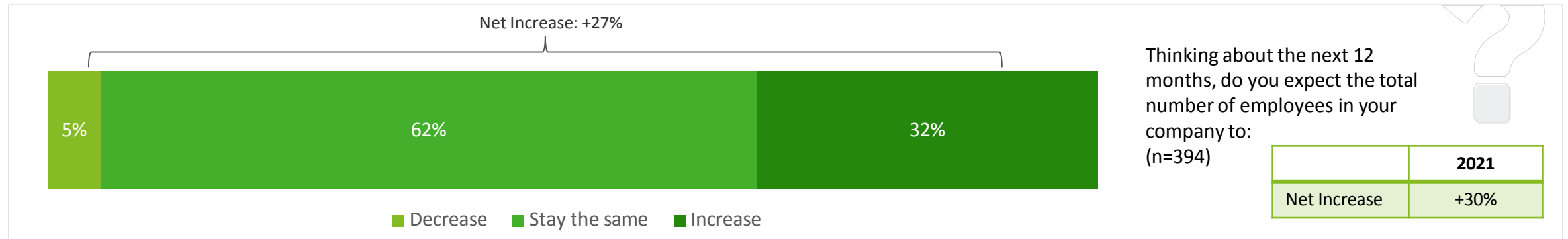
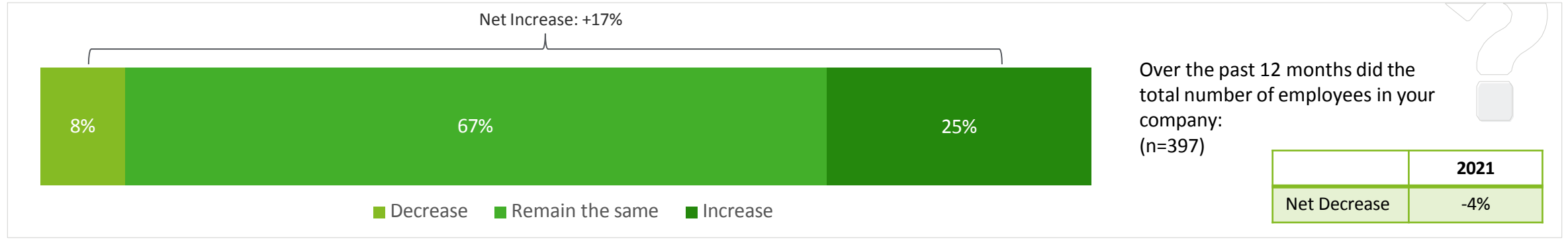
### Lease expires (n=231)





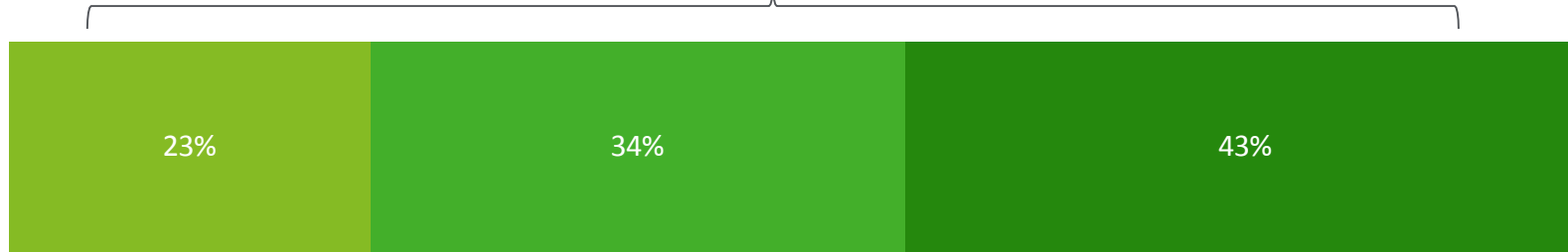
# Business Performance

# Business Performance



# Business Performance

Net Increase: +20%

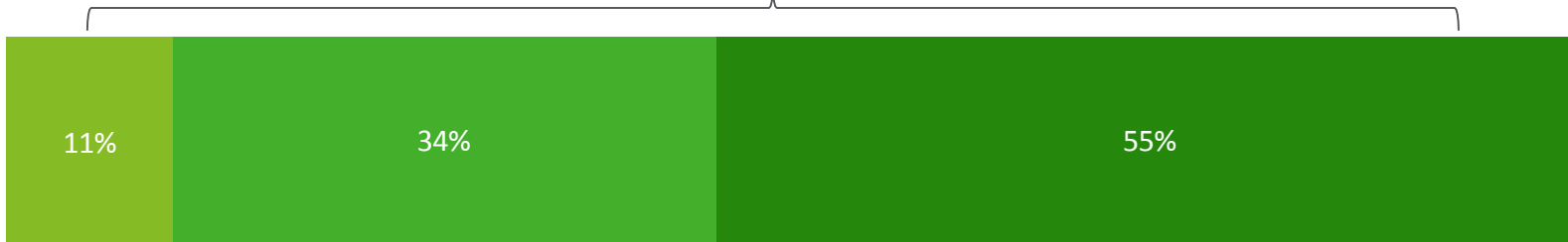


■ Decreased ■ Remained the same ■ Increased

Compared to the past 12 months, have the revenues at your business this fiscal year: (n=375)

	2021
Net Decrease	-11%

Net Positive: +44%

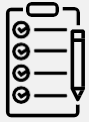


■ Lower ■ The same ■ Higher

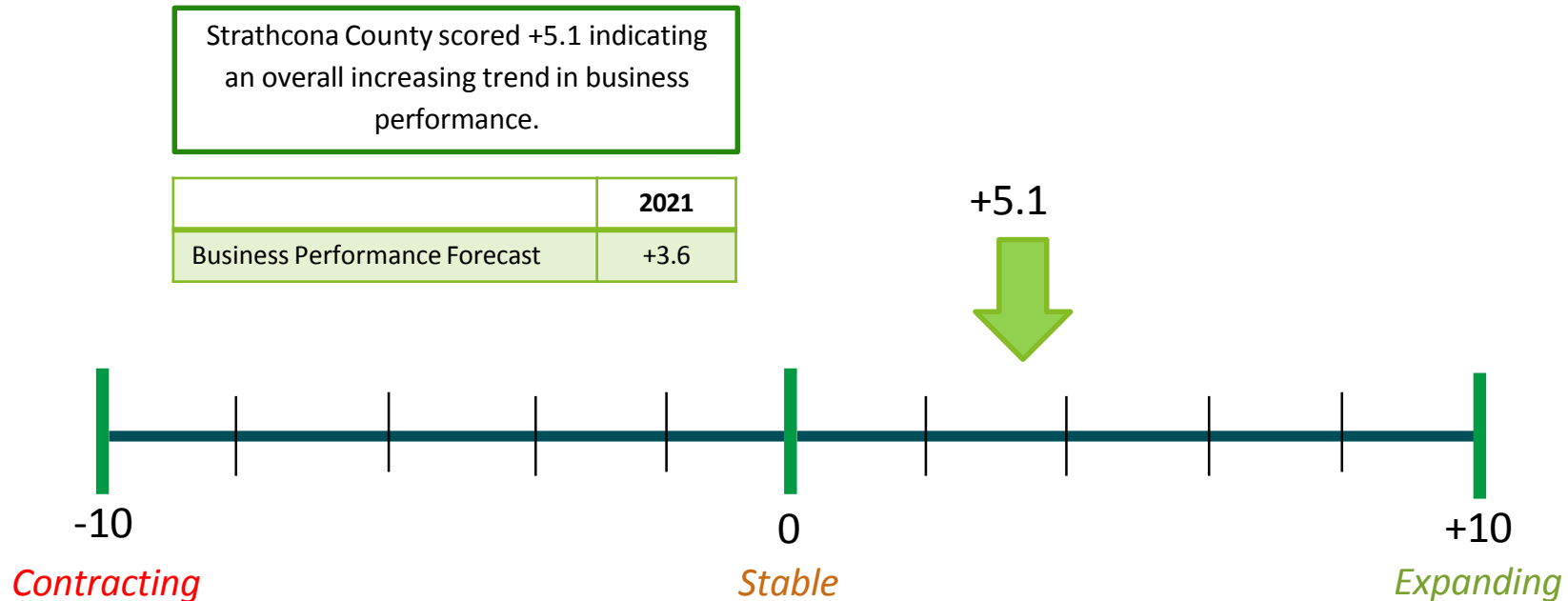
And what are your expectations for the next 12 months in total revenues compared to last 12 months? (n=380)

	2021
Net Positive	+45%

# Business Performance



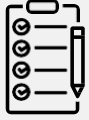
The Business Performance Forecast is a metric created by combining the five business performance questions. It considers the changes in staff, revenue and attitudes among businesses in the region for an overall directional picture of the business climate in the area.



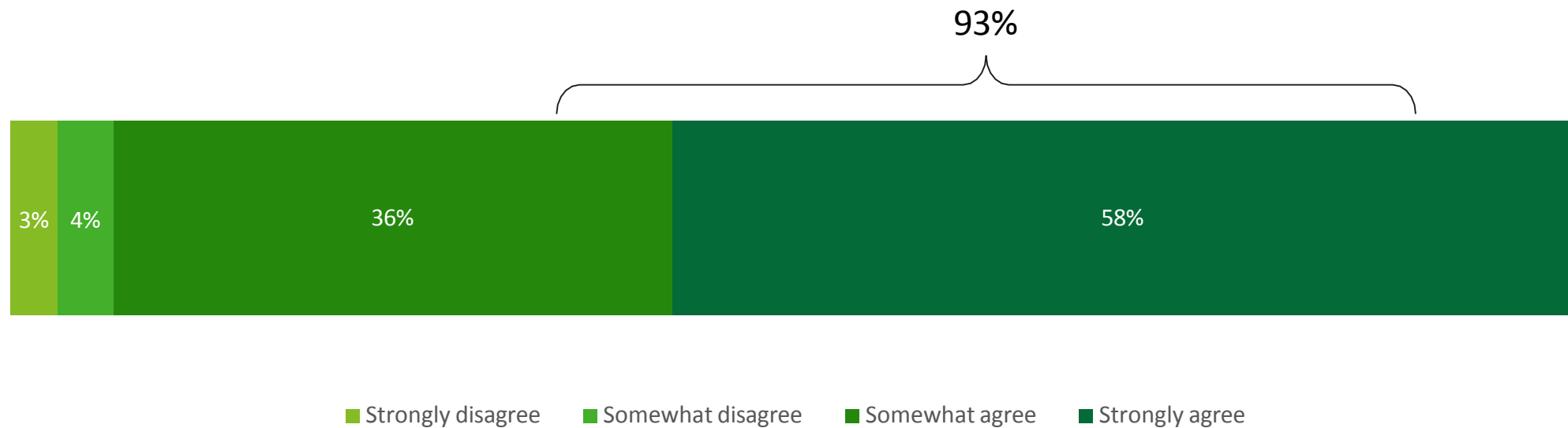


# Net Promoter Score

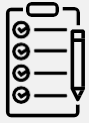
## Community Recommendation



Please rate the level to which you agree or disagree with the following statement: I would recommend this County to another business looking to expand or relocate. (n=394)

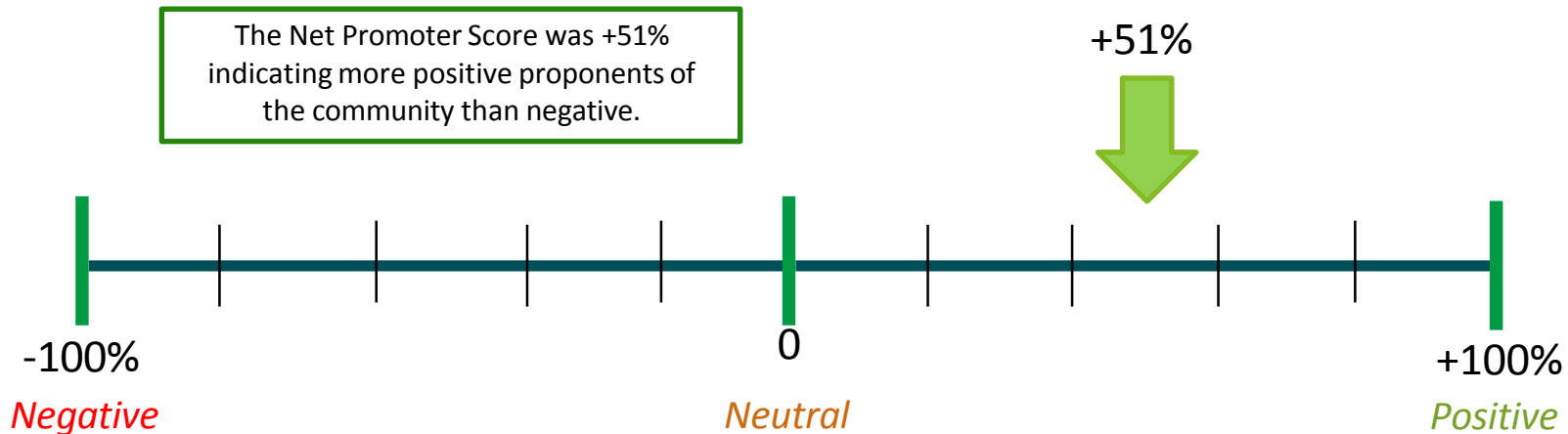


# Net Promoter Score



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

Group	Definition	Response to question	Percentage
Promoters	Active proponents of the community	Strongly Agree	58%
Passives	Neutral businesses	Somewhat Agree	36%
Detractors	Businesses with a negative opinion that may harm branding efforts	Somewhat Disagree or Strongly Disagree	7%

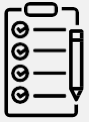






# Key Performance Indicator (KPI)

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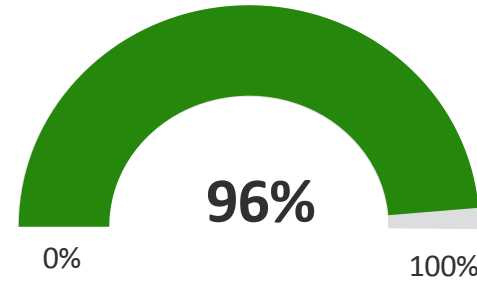


Overall, how satisfied are you with Strathcona County as a place to own and operate a business? (n=401)

## KPI

■

	2021
Top 2	91%



■ Very dissatisfied   ■ Somewhat dissatisfied   ■ Somewhat satisfied   ■ Very satisfied



# Satisfaction Levels

# Satisfaction Levels



## How satisfied you are with each of the following factors of doing business in Strathcona County (n=401)



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



## Satisfaction Levels – Time Tracking

Factor	2024	2021	Percentage Point Change
Availability of professional services to support your business operations	96%	94%	2%
Support from other businesses	96%	91%	5%
Support from residents	95%	92%	3%
Street events and community gathering spaces	93%	89%	4%
Local roads and streets	92%	86%	6%
Availability of professional and work-related training	89%	82%	7%
Strathcona County support and assistance	89%	79%	10%
Availability of public garbage/recycling receptacles	88%	81%	7%
Zoning	88%	76%	12%
Availability of space for rent or lease	86%	84%	2%
Availability of a diverse workforce	86%	N/A	N/A
Development charges and other planning fees	83%	74%	9%
Development/building permit process	82%	74%	8%
Municipal property taxes	81%	75%	6%
Availability of unskilled labour	81%	71%	10%
Availability of adequate housing for your staff	80%	85%	-5%
Cellular phone service	79%	83%	-4%
Availability of property for purchase	79%	77%	2%
Availability of skilled labour	77%	65%	12%
Public transportation	77%	75%	2%
Active/non-car transportation connectivity	76%	69%	7%
The availability of internet service to support business needs	72%	72%	-
Overall cost of housing	54%	N/A	N/A



# Derived Importance & Priority Matrix

# Priority Matrix

Factor	Performance	Importance	Priority Rank
Overall cost of housing	54%	6.8	1
The availability of internet service to support business needs	72%	7.3	2
Development/building permit process	82%	9.4	3
Active/non-car transportation connectivity	76%	6.8	4
Availability of skilled labour	77%	6.6	5
Public transportation	77%	6.4	6
Availability of property for purchase	79%	6.6	7
Cellular phone service	79%	6.4	8
Municipal property taxes	81%	6.8	9
Development charges and other planning fees	83%	7.3	10
Availability of adequate housing for your staff	80%	6.0	11
Availability of unskilled labour	81%	6.2	12
Availability of public garbage/recycling receptacles	88%	9.0	13
Zoning	88%	8.8	14
Strathcona County support and assistance	89%	8.3	15
Availability of space for rent or lease	86%	6.2	16
Availability of a diverse workforce	86%	5.6	17
Availability of professional and work-related training	89%	6.0	18
Local roads and streets	92%	5.6	19
Support from residents	95%	7.5	20
Street events and community gathering spaces	93%	6.0	21
Support from other businesses	96%	8.1	22
Availability of professional services to support your business operations	96%	6.4	23



Higher  
Priority



Lower  
Priority

# Priority Matrix – Time Tracking

Factor	2024 Priority Rank	2021 Priority Rank
Overall cost of housing	1	N/A
The availability of internet service to support business needs	2	2
Development/building permit process	3	3
Active/non-car transportation connectivity	4	7
Availability of skilled labour	5	1
Public transportation	6	9
Availability of property for purchase	7	15
Cellular phone service	8	13
Municipal property taxes	9	6
Development charges and other planning fees	10	5
Availability of adequate housing for your staff	11	17
Availability of unskilled labour	12	8
Availability of public garbage/recycling receptacles	13	11
Zoning	14	10
Strathcona County support and assistance	15	4
Availability of space for rent or lease	16	12
Availability of a diverse workforce	17	N/A
Availability of professional and work-related training	18	14
Local roads and streets	19	16
Support from residents	20	20
Street events and community gathering spaces	21	18
Support from other businesses	22	19
Availability of professional services to support your business operations	23	21





# Business Community Health Index

# Business Community Health Index



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

**Overall Satisfaction**

**Workforce Attraction and Retention**

**Change in Attitudes**

**Future Plans**

**Business Policies, Supports and Incentives**

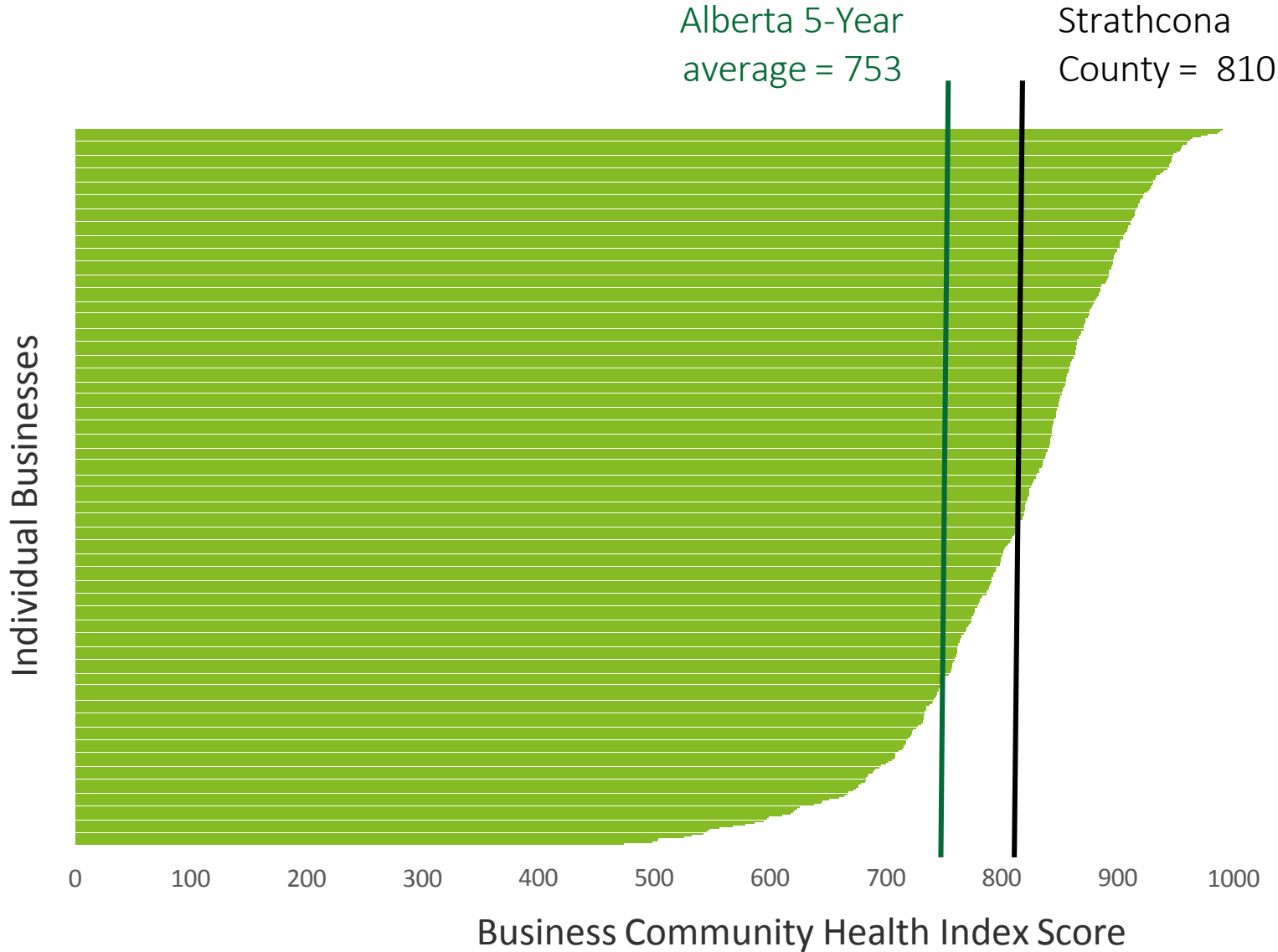
**Change in Revenue**

**Community Recommendation**

**Infrastructure and Amenities**

**Revenue Outlook**

# Business Community Health Index



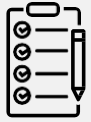
Strathcona County scored very well on the Business Community Health Index. This index is based on several factors:

- The County outperformed the provincial average on businesses' ratings of Business Policies, Supports & Incentives, Workforce Attraction & Retention measures, and Infrastructure & Amenities.
- The County did not score lower than the provincial average on any BCHI sub-scores.
- The overall BCHI increased from 710 in 2021 to 810.

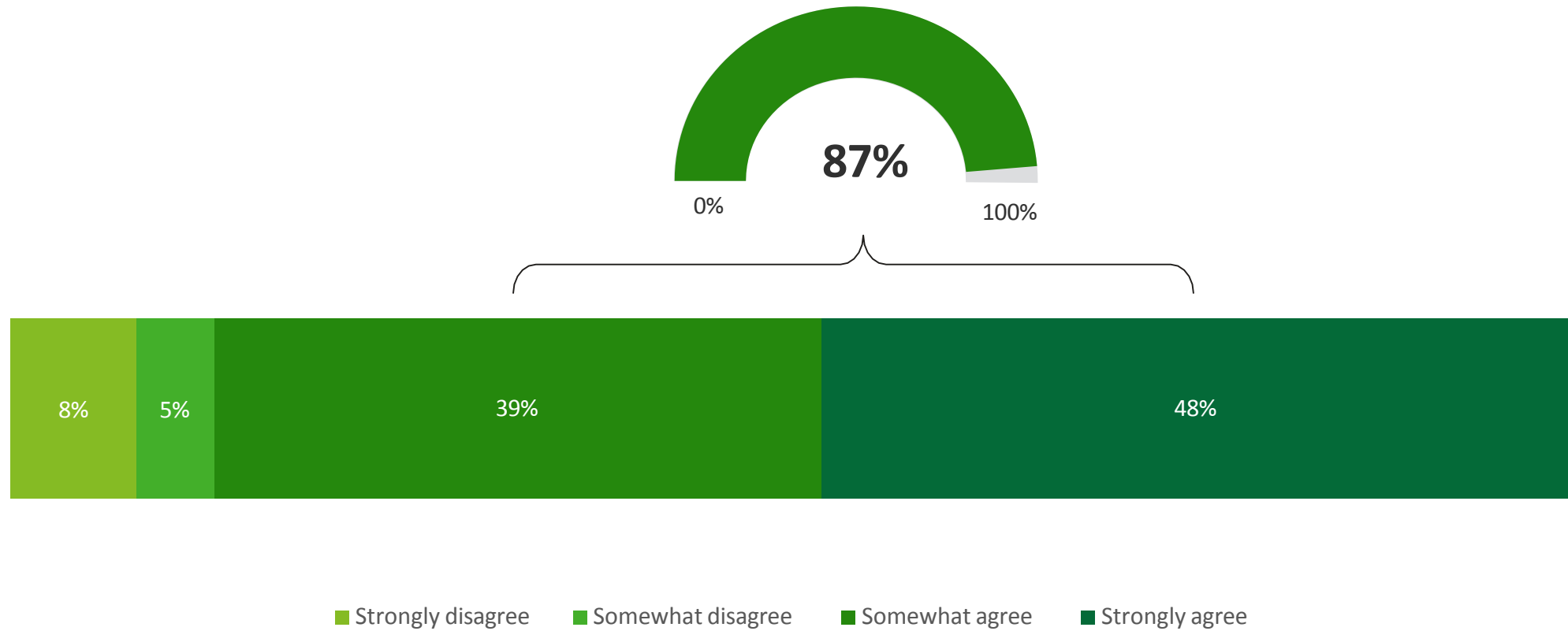


# Diversity, Equity, and Inclusion

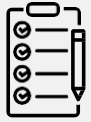
# Diversity, Equity, and Inclusion



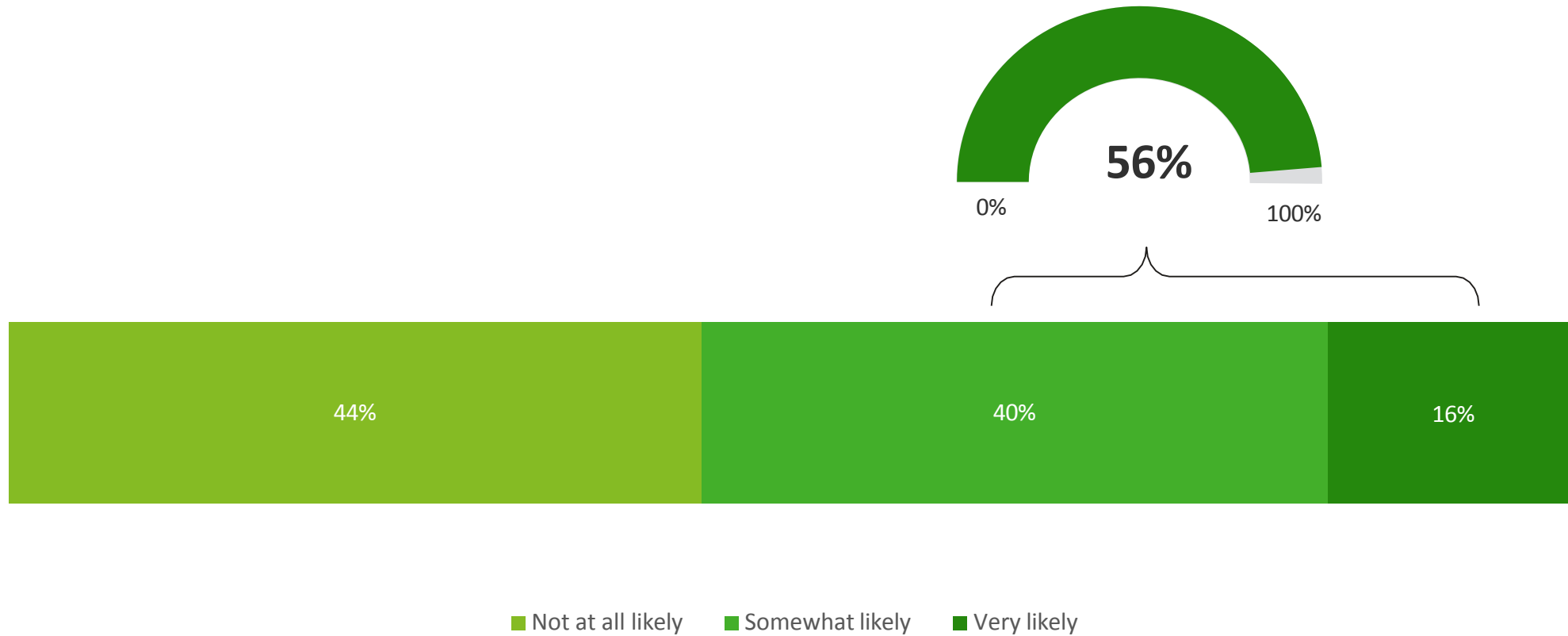
To what extent do you agree that Diversity, Equity and Inclusion (DEI) principles are a significant consideration in your regular business practices? (n=383)



# Diversity, Equity, and Inclusion



If a DEI training session or workshop was available for businesses in Strathcona County, how likely would you be to attend?  
(n=401)





# Future Plans

## Future Plans – Next 24 months



### Businesses with plans to expand:

- **82** businesses total
- **19** within the next 6 months
- **63** in more than 6 months

### Plans to downsize:

- **11** businesses total
- **11** in more than 6 months

### Plans to relocate:

- **10** businesses total
- **2** within the next 6 months
- **8** in more than 6 months

### Plans to close:

- **6** businesses total
- **1** within the next 6 months
- **5** in more than 6 months

### Plans to sell:

- **13** businesses total
- **8** within the next 6 months
- **5** in more than 6 months



## Triage Flag Results

Throughout the survey process Triage cases that represented green or red flags were tracked. Out of the 401 businesses surveyed, 146 businesses presented an opportunity for intervention.



= Businesses considering expanding in the next 2 years. = 82 businesses



= Businesses considering relocating, downsizing, selling, or closing. Also, businesses whose lease expires in less than a year. = 64 businesses





# Conclusions

## Conclusions

**Highly Satisfied Business Community:** Businesses operating within Strathcona County are highly content with the area as a place to conduct their operations, with an 96% satisfaction rate. Businesses were especially satisfied with satisfied with the availability of professional services to support their business operations (96%), support from other businesses (96%), and the support from residents (95%). High scores in these metrics have a strong impact on the overall satisfaction scores of the local business community and are excellent indicators of a healthy community economy.

**Top Business Priorities in the County:** Using Deloitte's proprietary Derived Importance methodology, it was found that the top priority factors for the business community include overall cost of housing, the availability of internet service to support business needs, development/building permit process, and active/non-car transportation connectivity.

**At the business community-level,** Deloitte recommends that the County examine the top items in the Priority Matrix and assesses where improvements can be made. If the County is able to make improvements in these areas for the business community, this would be expected to improve overall satisfaction looking forward.

**At the individual business-level,** Deloitte recommends following up with the businesses who have opted to share their individual responses, to connect and offer any supports available that may benefit them. Some items that are well-suited to prioritize which businesses to follow-up with include:

- Green or red triage flags
- High or low Business Community Health Index scores

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