2012 Business Visitation Report Cardston County The MD of Pincher Creek & The Village of Waterton

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The following is a summary report based on information gathered during a business visitation project conducted in Cardston County, the MD of Pincher Creek and the Village of Waterton, Alberta over a three-month period from July through September, 2012.

Introduction

From July through September 2012 Community Futures Alberta Southwest (CFABSW), in cooperation with the MD of Pincher Creek, Cardston County, the Village of Waterton, and associated chambers of commerce in each jurisdiction, conducted a Business Visitation Project (BVP). The project was designed to gather information that will allow Community Futures, the County, the Municipal District, the Village of Waterton, chambers of commerce, and other community leaders to more fully understand the needs of local businesses.

With the understanding that small and medium-sized enterprises are catalysts in our communities (between 50 and 80 percent of all new jobs are generated by these businesses), it is Important to identify their needs and support their retention and growth in our region.

The objective of the project was to be comprehensive by contacting as many businesses as possible in order to gain an accurate picture of what the communities and regions require to grow and where their potential for growth lies; gauging the pulse of the business community and equipping leaders with the information they need to make informed decisions about what affects the business community.

In addition, the six organizations participating in the project wished to communicate to the business community their interest in understanding business concerns and assisting in their resolution where possible.

The decision to combine three jurisdictions into one project was based on several factors including the relatively small number of businesses within each jurisdiction. Though most of the statistics and information contained in this report will refer to all businesses interviewed, certain references may be made to one or another jurisdiction when appropriate. Also, it is possible to separate the information gathered into individual regions for future analysis.

This project was the fourth of several similar projects designed to evaluate the communities in the Community Futures Alberta Southwest region. The results of these initiatives and the information that CFABSW gathers will be used internally, and shared with our stakeholders, to assist in capacity building, entrepreneurial development and technical assistance.

Methodology

Cardston County, the MD of Pincher Creek and the Waterton Chamber of Commerce provided CFABSW with a list of businesses in their respective jurisdictions. These lists were refined by further research conducted by CFABSW staff. Some businesses were added and others, that were no longer in operation, were removed.

One hundred and seventy-four businesses were enumerated in the three jurisdictions once the research had been completed. Seventy-three businesses were confirmed in Cardston County within the boundaries of the CFABSW region, Forty-seven were confirmed with the Village of Waterton, and Fifty four in the MD of Pincher Creek.

Twenty-nine businesses were owned or operated by the same individual or group cutting back on 23 businesses to interview (20 of these businesses were in Waterton alone). This left the total potential number of business owner/operators to interview at 151. Of this number 58 businesses were home-based.

Advance promotion of the program was used only in the Village of Waterton where a letter introducing the program was circulated to all Chamber members.

Businesses were contacted to participate in a brief sit down meeting, interview format, with Community Futures staff to provide their feedback on a number of issues related to their business. Owners and managers were asked to address issues that ranged from basic business activities to market conditions and the company's primary market base and from labour force requirements to the area's strengths and weaknesses as a place to do business.

Each visitation, conducted as a survey, took approximately 20 minutes to complete; all information collected is to be kept in strict confidence and data released only in summarized form such as this document. The design of the survey consisted of 41 questions (several with multiple parts) divided into six sections: Primary Business Data, About the Business, Market Conditions, Future Plans, Community Services, and Entrepreneur Support Services.

A blank copy of the survey has been included at the end of this report as **Appendix A**.

Upon completion of the project **contact had been attempted with all one hundred and fifty-one businesses and this resulted in 89 interviews completed (58.9%)**. This report, all data and analysis, will be based on this number, the total number of completed interviews.

Initially businesses were contacted utilizing a cold call approach in villages with the MD of Pincher Creek, the Village of Waterton, and the villages in Cardston County. A percentage of surveys were completed during these initial contacts. However due to the rural nature of the MD and the county, contact during the first attempt was not as effective as in previous projects where there had been a concentration of businesses in one area.

Thirty-eight percent of respondents (34 businesses) chose to complete the survey on their own time for convenience and forward the form back to the CFABSW office. A survey was left for these individuals or emailed to them. This is a much larger percentage than in previous projects and again reflects the nature of conducting this type of survey in a rural area.

Phone calls were utilized as the second method to contact and arrange appointments with a large percentage of businesses. This was required as phone numbers were the only source of contact in many cases. It also had an advantage in cutting down on resources (time and mileage) spent on the project by arranging appointments in advance. Its disadvantages were an increase in the non-participation rate, the inability to make contact in many instances, and a reduction in the number of returned surveys sent out to respondents.

Twelve owner/operators declined to participate for one reason or another. Sixteen businesses contacted on numerous occasions did not return calls. Another thirty-five businesses who were contacted and sent a survey by mail or e-mail did not return their survey. Of these 35 owner/operators who were unable to arrange a compatible time to meet with the project coordinator and were forwarded surveys, telephone follow-up observed that many of these owner/operators could not find the time to complete the survey.

Viewed individually, Cardston County had a 53.5% participation rate, the Village of Waterton had a 77.8% participation rate and The MD of Pincher Creek had a 55.5% participation rate.

General Observations

- The service sector is represented dominantly with 38% (34) of all business interviews. The retail sector comprises 21% (19) of all interviews. Tourism and Food & Beverage are represented by 10.1% (9) and 9.0% (8) of all interviews respectively. Agriculture, Construction and Transportation comprise a total of 8% (7) all interviews. The Financial, Insurance & Real Estate, Manufacturing, and Business and Professional Services sectors each added four interviews (5%);
- A very large number of businesses interviewed, 35 (39%), were home-based in this project. This reflects the nature of many traditional home-based businesses, trades and contractors, as well as the number of bed and breakfast businesses operating in these jurisdictions;
- Though only eight percent of businesses self-identified as being in the tourism/recreation sector, 19% of businesses listed bed and breakfast or camping and trailer services as their primary activity. Eleven percent of businesses listed tourist-related retail sales as their focus. This would suggest close to forty percent of the interviewed businesses have a tourism focus;
- Seventy-four percent of owners have over 16 years business experience (the average: 27 years);
- Forty-nine percent of owner/operators have over 16 years business experience in the specific sector they now work in (the average: 19 years);
- Forty-nine percent of businesses were started before 1994; 27% started in the last 10 years;
- Seventy-three percent of owners own a 100% stake of their business vs. 11% of operators who own no share;
- Close to 35% of owners have started up or taken ownership of their present business in the last eight years vs. 39% who took up ownership between the years 1995 and 2004, and 26% who took up ownership in the year 1994 or before;
- Sixty-one percent of all businesses were started up by the present owner versus 24% of businesses which were purchased by the present owner. The remaining 15% either inherited the business or manage the business for the owners;
- Eighty-five percent of respondents feel word-of-mouth is their most effective form of promotion;
- A very low number, only 18% of businesses feel the pressure of increased competition, while 49% feel their market share in the region is staying the same, and another 45% feel it is increasing;

- Strong interest was indicated by respondents in courses on business planning and plan updating (55%), social media (53%), marketing and market research (47%), customer service (45%), and business transition planning (41%);
- Trends in the 19 questions on "future plans for the business" were mixed with high percentages in the **likely** and **very likely** responses for 13 of the 19 questions. Those areas which indicated negative trends included expanding or relocating current facilities, redesigning current facilities, seeking additional financial capital, upgrading computer equipment, redesign operating activities, and investing in off-site training for employees. There was also only a one or two response margin of difference on the topics of investing in new equipment, and adding labour, both skilled and unskilled;
- Though only 21% of businesses show job vacancies at the present time (average number of vacancies per business: 0.9), 55% of businesses expect to add new positions over the next five years (average number of positions to be added per business: 2.5). Forty-five percent of businesses expressed difficulty in obtaining employees for their needs.

Report Findings

Section 1 – Primary Business Data

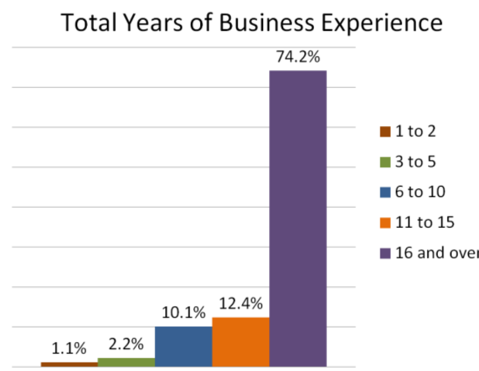
The only relevant observation to be made in section one is on the hours of business operation the respondents observe. All other data in this section identifies the business, its owners, and contact information – all which is being kept confidential. Normal business operations for respondents were based on a five day work week Monday through Friday. Note some of the businesses are captured more than once in the percentages below.

- Thirty-seven businesses (42%) open their doors at 9.00 AM or before and operate through the day until 5.00 PM – 6.00 PM. Nineteen of these businesses (21%) operate extended hours into the evening;
- Thirty-nine businesses (44%) keep weekend hours;
- Thirty-one businesses (35%) are open seven days a week; five of these businesses (6%)have 24 hour service;
- Thirty operations (34%) keep business hours which vary;

Excluding the 35% of businesses whose hours of operation vary, a solid 65% of enterprises surveyed are engaged in business activity full-time during the week. It is encouraging to see the number of businesses that offer extended hours of operation and are open on the weekend. This likely reflects the nature of many of these businesses which are either in the tourism industry or a tertiary industry.

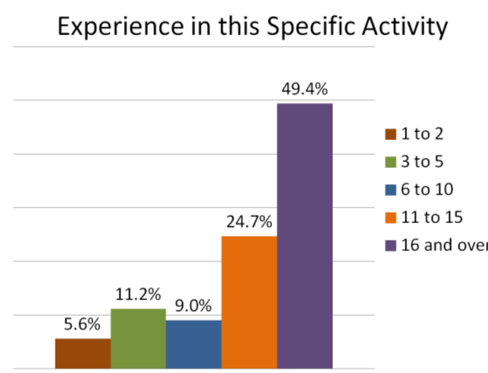
Comments not directly related to businesses hours were made by respondents on ways to extend the operating season and make their business more commercially viable in the off-season by adding additional recreational activities and promoting winter opportunities in the region. Though this was not a specific question between 25% to 28% of businesses, especially those in the Waterton area and businesses operating bed and breakfasts, were interested in exploring this option.

Section 2 – About the Business



Sixteen questions relating to business operations are analyzed in this section. The purpose of these questions is to define such factors as business history, organization, and business sector information. It also evaluates owner/operator experience and offers reasons for establishing the business in a respective district.

Seventy-eight percent of all respondents have at least eleven or more years of business experience. While 22% are business owners or operators that have 10 or less year's experience.



This reflects the existence of an established, experienced business base in the regions, with a representative number of new, more recently established owner/operators entering the business communities. The average number of years of business experience from all respondents was 22 years.

Of those same respondents, 58% indicated that they have experience with their specific business activity for at least 11 years. Forty-two percent of those surveyed indicated that they were undertaking the specific activity for 10 years or less. This again would seem to indicate a significant amount of new business activity being undertaken, a strong indicator of entrepreneurial spirit.

Seventy-three percent of the businesses themselves, or 65 enterprises, have been in operation for eleven years or more, with 27%, or 24 businesses starting operations over the last 10 years.

This data compares to another question which queried respondents on the number of years they have operated their business. The responses here indicate an upward trend in ownership or operation with the businesses surveyed over the last 10 to 17 years as follows:

Years	Percentage	Number of respondents
2012 to 2005	34.8%	31
2004 to 1995	39.3%	35
1994 and before	25.8%	23

Seventy-three percent of businesses (65) are 100% owned by the respondents surveyed. Fourteen respondents (16%) indicated they owned a portion of the business with other investors, while 11% (10) had no ownership stake in the business. These respondents generally account for the managers, administrators and executive officers hired to operate the business.

A large number of businesses in this project were family owned and operated businesses. Forty-six percent of businesses were owned by between two and five family members.

The reasons given for owners establishing business operations in a particular location were as follows:

- Proximity to Home 34.8%, 31 respondents
- Proximity to the Market 29.2.6% 26 respondents
- Pursuing a Business Opportunity 27.0% 24 respondents

The remaining eight owner/operators cited location, low operating costs, and addressing an identified need as factors in their decision.

Fifty-four owners, 61%, started their businesses, while 21 owners, 24%, purchased existing businesses. Fifteen percent of businesses (14) were owned/operated through different circumstances. Several businesses utilized management or executive staff: six hired externally; four were hired internally. Four owners inherited their businesses.

Forty-nine percent of businesses (53) are organized through incorporation, while thirty percent (27) operate as sole proprietorships. Six businesses (7%) self-identified as partnerships. Two businesses (2%) were cooperatives and one (1%) was a non-profit.

Questions relating to the business premises solicited the following responses:

- Thirty-nine percent of businesses (35) are home-based;
- Thirty-five percent of business premises (31) are owned;
- Twenty-six percent of business space (23) is leased;

- Sixty-three owner/operators (71%) found their business location accessible;
- Sixteen owner/operators (18%) found their business location adequate;
- Ten owner/operators (11%) found their business location out-of-the-way;

- Seventy-one owner/operators (80%) found their business facility size adequate;
- Sixteen owner/operators (18%) found their business location too small;
- Only two owner/operators (2%) found their business location too large.

Less can be made of these results in terms of development opportunities than in earlier projects. The large number of home-based businesses and leased operated space is reflective of the number of bed and breakfasts in the region, the accommodation of many businesses on ranches or farms, and the businesses found in the Village of Waterton. These conditions are unlikely to change very rapidly.

Businesses in the County and the MD made no reference to shortages of property or buildings to lease, purchase or develop. Several businesses in the Village of Waterton did discuss the difficulty finding new, larger space for their business or expanding their existing operations due to limitations placed on growth by Parks Canada. This is becoming a critical issue in terms of the shortage of staff housing. Also given the shortage of space in the Village the cost for leasing existing space is increasing.

Recently Parks Canada, after consultation with regional stakeholders including the Waterton business community and the residents of Waterton, issued the Waterton Lakes National Park Management Plan 2010. The document outlines the strategies for development of the park including priorities to advance the heritage and environmental components of the park. It also provides a framework for acceptable activities and land use. Most of the park's guidelines are based on the Canada National Parks Act, Parks Canada Acts and Regulations and Parks Canada Guiding Principles and Operational Policies.

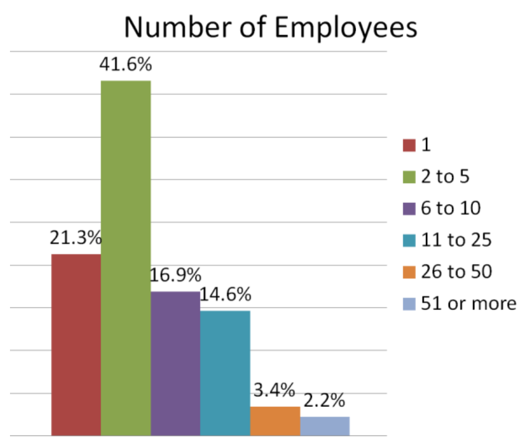
In 2013 and 2014 the Village of Waterton will be undertaking an update to its community plan. It will also consult with the regional stakeholders that are affected by development and activities in the community. Accordingly, the village hopes to receive as much input and cooperation from the various stakeholder groups as possible.

Economic development is a critical issue to the business community in Waterton. Increasing available land for development purposes, issuing permits for property development, renovations and additions, developing regulations and bylaws for signage, improving infrastructure, and extending activity in the park by opening up it up to off-season recreation, are all items the business community would like to see addressed. According to the businesses interviewed there is a necessity for capacity building, even at a measured pace, to sustain the economic health of the community.

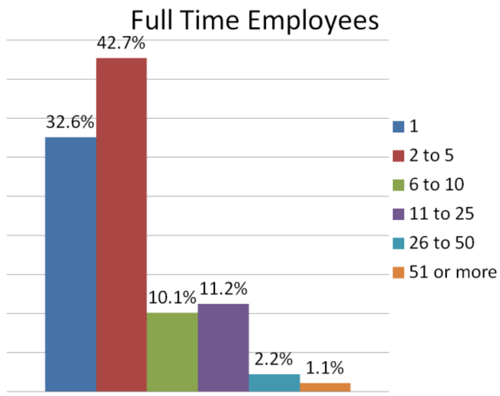
Shifting to the workplace, owner activities, and employment, it is worth noting the high percentage of owner/operators who devote in excess of 40 hours to their business per week. This is typical with small and medium sized enterprises. Eighty-four percent of all respondents indicated they spend over 40 hours a week with their business; fifty-two percent devote over 61 hours to operations. All respondents collectively averaged approximately 67 hours per week.

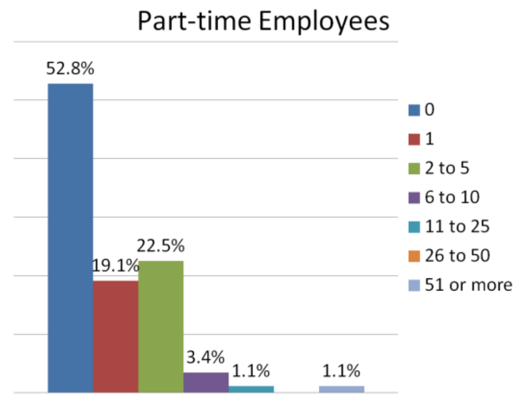
Hours Devoted to Business	Percentage	Responses
1 to 20	5.6%	5
21 to 40	10.1%	9
41 to 60	32.6%	29
61 and over	51.7%	46

The size of operations and economic impact a business has on its community or region can often be reflected in the number of staff employed by the business. Of the businesses interviewed, including single operator businesses, 80% (71 enterprises) operate with ten or less staff. The largest segment, 42%, of these businesses (37) employ between two and five employees. All organizations collectively averaged eight employees per business.



Of those businesses employing fewer than ten staff, 85% employ the majority of their staff full time. Nine businesses (10%) employ between six and ten staff, with 38 businesses (43%) employing between two and five full time staff. Twenty nine respondents (33%) hired only one full time staff member. This represents the large number of single operator enterprises. Ten businesses (11%) staffed 11 to 25 full time positions, two businesses (2%) employee 26 to fifty full time staff. Only one enterprise (1%) interviewed engaged over 51 full time employees. All organizations collectively averaged six full time employees per business.





Compared to fulltime positions, businesses hire a smaller percentage of their workforce as part-time staff. Fifty-three percent, 47 businesses, hire no part-time staff at all. Nineteen percent, 17 businesses, employ only one part-time staff, while 23% or 20 businesses, hire between two to five part-time staff. Three businesses (3%) hire between six to ten part-time staff. That represents 98%, or 87 businesses interviewed that employ ten or less part-time staff. The number of part-time employees averaged just below two employees per business.

The ratio of full time employment to part time employment is important. The strength of full time employment is very good for all three regions. Full time employment indicates a degree of economic health and stability in the business community, and business confidence in its workers. It reflects well on the businesses themselves, and also provides an attractive employment incentive to workers and job seekers. However, to put this in proper context there are also challenges that affect employee attraction to each of these jurisdictions, especially Waterton.

One qualification to these numbers, it should be noted that although there is a discrepancy between full time and part-time staff, many of these full time positions, specifically in hospitality sector, are seasonal in nature. Another is that the owner/s of bed and breakfasts have been considered full time staff.

Section 3 – Market Conditions

The market conditions section looks at a series of questions relating to the competitive environment that business owners and operators work within.

Owners and operators defined their primary market area the following way:

- Forty-eight businesses (54%) saw their market as regional, occasionally including areas reaching into the cities within the province and inter-provincial markets (BC and Saskatchewan);
- Fifteen businesses (17%) defined their market as local;
- Four owner/operators (5%) viewed their market as national in scope;
- Twenty-two owner/operators (25%) viewed their market as international in scope.

Queried as to where they felt their greatest market competition came from, 49% or 44 businesses, felt they are competing regionally for sales. Thirty-three percent, or 29 businesses, responded that they competed primarily in the local market. Nine businesses (10%) defined their competition as the national or international marketplace, while seven businesses (8%) felt they had no competition in their market at all. These were generally businesses which tend to provide a unique service or product to the market. Support for businesses such as these, and possible attraction strategies for businesses which complement existing regional strengths should be encouraged in each jurisdiction.

The fact that 54% of businesses define their primary market as regional is a strong indicator of the interest and potential to grow this market. The 25% of businesses that define their primary market as international is a marked increase from other jurisdictions surveyed in earlier projects and reflects the tourism focus many businesses interviewed have as well as their proximity to the American border. A question later on in the survey elicited eight requests for information on developing import/export strategies. A combined fifteen businesses already do, or are planning in the future to, export products they produce. Consideration of business retention and attraction strategies which foster development of these markets should also be investigated further.

Asked what they felt their businesses' greatest competitive advantages were, and allowed to provide more than one response, owners and operators responded accordingly:

What are Your Businesses Greatest Competitive Advantages		
	Percent	Responses
Customer Service	76.4%	68
Product/Service	76.4%	68
Loyalty to the business	61.8%	55
Location	57.3%	51
Other (please specify)	12.0%	9

Customer Service and Product/Service emerged as the main advantages business owner/operators feel they are providing their patrons. Loyalty to the business and location were also considered important components both receiving acknowledgement by over 55% of respondents. Other advantages included competitive pricing, flexibility, uniqueness of product/service, and attention to detail.

Questioned as to which target markets were essential to the success of their business, owners and operators identified their markets in a number of ways. Some specified a target market or audience, others associated with a particular sector, others identified a particular age demographic, and finally many saw their market as local, regional, or open to all clientele. The following table illustrated the responses given:

Target Markets	Percentage	Responses
Tourists and Travellers	26.7%	32
Local and Regional Markets	10.8%	13
Specifically Unique Audience	10.0%	12
Ranchers and Farmers	9.2%	11
Outdoor Adventure and Sports Enthusiasts	8.3%	10
Homeowners	6.7%	8
Business-to-Business	5.8%	7
All Markets	5.8%	7
Families	5.0%	6
Seniors	5.0%	6
Construction/Contractors	4.2%	5
First Nations	2.5%	3
Total:	**100.0%**	**120**

The extent to which businesses can readily define their target market speaks to the strength of the owner/operator's understanding of their clientele. Seventy-two percent of all businesses identified 86 specific markets as primary consumers of their products and services. This is slightly higher than project numbers from other jurisdictions. Thirty-four responses (28%) were more general in the classification of their market. These businesses identified their markets using the categories of local regional/markets, homeowners, all markets, and families.

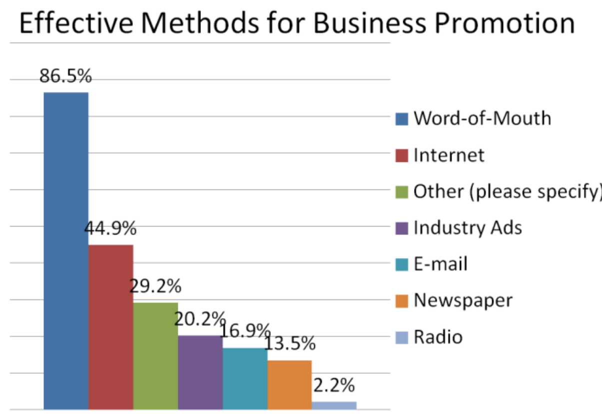
As a follow-up, owner/operators were asked what aspect of their business offered the greatest potential for growth. The question solicited a wide range of responses given the variety of opportunities available to the businesses surveyed. Several themes did emerge as illustrated in the following table:

Opportunities For Business Growth	Percentage	Responses
Expansion or Growth of Existing Services or Products	29.0%	31
Addition of New Products and Services	17.8%	19
Improved Customer Service	15.9%	17
Growth in the Market Area & the Regional Population	12.1%	13
Expansion or Relocation of the Business	10.3%	11
Growth Within a Targeted Demographic	10.3%	11
Presently No Opportunities for Business Growth	4.7%	5

Consideration of these inclinations should be taken by each jurisdiction and other economic development stakeholders as areas to focus on when seeking to assist the business community as they give insight into what businesses in the community are thinking.

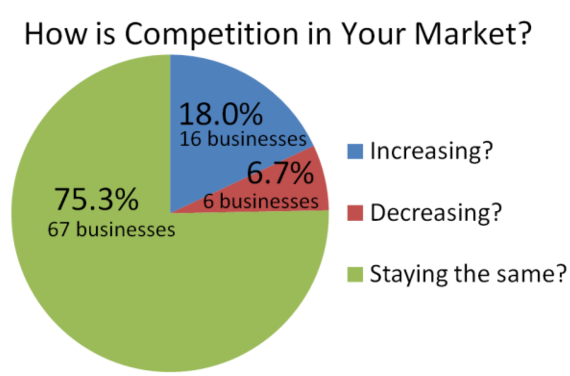
A significant number of businesses have considered future growth. The majority of those expanding or growing with existing products and services, those adding new products or services, businesses focused on improved customer services, and those focused on growing their market areas (approximately 75% of all businesses), even those companies which have targeted growth with a specific demographic, appear to have a plan. Companies planning to expand or relocate, and those businesses which presently see no opportunity for business growth, 15% of all respondents, may have a less focused or less optimistic perspective about their future.

When asked what methods of business promotion are most effective for their enterprise, business owners, given the opportunity to select more than one answer, responded accordingly:



Word-of-mouth was easily the most frequent response given with 77 owner/operators suggesting this as the most effective, often the only, method of promotion used. This is understandable in a rural environment where word travels fast and effectively around the community and region, and where businesses often have a small or non-existent budget for promotion. Word-of-mouth and a good reputation go hand-in-hand.

Three additional methods of advertising and promotion are worth noting. First the Internet – 40 respondents utilize this form of advertising. As more businesses become accustomed to the utility of using this technology to promote their operation, their products and services, the Internet is rapidly becoming an effective way to market and promote, especially for the rural businesses and the tourism orientated businesses in these jurisdictions. The second is industry advertising. This seems to be a direct reflection of how the tourism sector engages industry publications and media to advertise their products and services. Finally, e-mail in keeping with its cyber counterpart, also appears as an effective tool for rural businesses to reach audiences.



Twenty-six businesses found various other methods of promoting their products and services useful. Some of the methods mentioned included direct mail flyers and posters, billboards, tourist maps and trade shows (12 mentions), regional visitors guides (8 mentions), the yellow pages (6 mentions), and referrals (5 mentions).

Asked whether competition in their market was increasing, decreasing or staying the same, an overwhelming number of businesses (93.3%) felt competition was either increasing or staying the same. Common reasons given for this were:

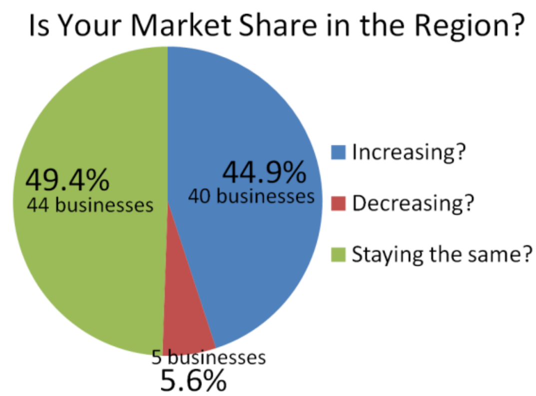
- New businesses, often larger, creating price competition, entering the market;
- Regional competition, fueled by the diversity of selection and the entry of big-box store competition;
- Too many similar businesses in the market, leading to market saturation;
- The general economic slump and slow recovery.

While the numbers above indicate consistent or increasing competition for businesses interviewed, the chart below illustrates the confidence that business owner/operators have in their market share.

Ninety-four percent of businesses felt that their market share is increasing or staying the same, 44.9% of that number, or 40 respondents, indicated their market share was increasing.

Common reasons given for this were:

- Constant or superior customer service with a strong reputation and good word of mouth referrals;
- Delivering quality services and product to their market;
- Expansion of market and increased demand for services;
- Aggressive approaches to marketing and going after business locally and in the region;
- Lack of strong competition in the region, or lack of any competition at all.



Two questions were asked to assess business training needs in the community. The first queried business owners as to whether they or their staff had taken courses on any of eight different topics. Fifty-nine respondents answered this question. Several had taken more than one course.

Have you or your staff taken any courses/programs on?	Percentage	Responses
Accounting	78.0%	46
Marketing and Market Research	71.2%	42
Customer Service	67.8%	40
Financing	66.1%	39
Business Planning and Plan Updating	50.8%	30
Social Media	25.4%	15
Business Transition Planning	16.9%	10
Bidding on Government Contracts	5.1%	3

Accounting had been covered by 76% of businesses. This is logical given the number of home-based businesses interviewed during the project. Seventy-one percent of owner/operators and their staff had training in marketing and market research. Training in customer service and financing had been taken by 66% to 68% of the businesses. Fewer organizations had taken courses on business planning and plan updating, social media, business transition planning and bidding on government contracts.

Ninety-seven percent (57 respondents) indicated that training, post-secondary and subsequent training, was taken externally (not part of an internal training program), only 3% (2 respondents) indicated that their training was conducted as part of their organization's in-house program.

When asked whether they or their staff would be interested in taking any of the same courses if they were offered locally or regionally 58 respondents replied the following way:

Would you or your staff attend one of the following courses?	Percentage	Responses
Business Planning and Plan Updating	55.2%	32
Social Media	53.4%	31
Marketing and Market Research	46.6%	27
Customer Service	44.8%	26
Business Transition Planning	41.4%	24
Accounting	31.0%	18
Bidding on Government Contracts	27.6%	16
Financing	24.1%	14

Demand for all of these courses exists. Most prevalently for the topics of business planning, social media, marketing, customer service, and business transition planning. Opportunities for delivery of training to address this demand should be considered by the appropriate partners. The challenge is to find efficient methods of delivering which accommodates the unique nature of businesses in these jurisdictions and then effectively promote these opportunities to the businesses.

Finally respondents were asked what their greatest challenges and greatest advantages or opportunities were with regards to operating their enterprises in their location. Again a range of responses were given:

Advantages/Opportunities – One hundred and twenty-five responses were provided by the eighty-nine businesses interviewed. They were as follows:

- Fifty-two owner/operators, or 59%, feel their main advantage to being established in specific jurisdiction is the location. This manifests itself in several ways. To some owners it was the access to transportation and regional amenities; others saw it as a convenience to their clientele in terms of access to local and regional activities. Finally certain businesses felt the beauty of the location was an advantage to their business by drawing in their target market;
- Twenty-two businesses, or 25%, indicated the central location they have to the markets they serve, their suppliers, and raw materials they require as their primary advantage;
- Fourteen businesses; or 16%, referenced the pleasure and fulfillment they received from doing their work and getting to know their clients and provide customized service;
- Eleven respondents (13%) indicated the support the business received from the community and the business' involvement in the community as an advantage;
- Eleven respondents (13%) mentioned unique economic advantages which the region provided to their business or their business provided to the region;
- Fifteen respondents (17%) could identify no immediate advantages or opportunities.

Challenges – One hundred and twenty-five responses were provided by the eighty-nine businesses interviewed. They were as follows:

- Forty owner/operators, or 45%, indentified location as the major challenge for their business. The challenge was often attributed to the difficulty non-locals had in locating their operation, the distance they were from their market or their suppliers, or the difficulty promoting a business and establishing an association with their clients from a rural location;
- Thirty-one owner/operators, or 35%, viewed increasing cost of operations, especially given the remote areas where transportation and access was an issue and in the Village of Waterton where limited space has resulted in high leasing expenses, as a major challenge;
- Twenty-two owner/operators, or 25%, indicated finding and retaining good, qualified staff as the primary issue they continue to face;
- Ten respondents (11%) indicated difficulty working with the municipal council and/or administration and Parks Canada on permits, licensing, and other development issues, citing unfair treatment and lack of focus on the business community which prevented their business from thriving or expanding. Specific issues include problems with signage bylaws, lack of municipal planning and cooperative support for business development;
- Nine businesses (10%) suggested the seasonality of their business was an issue as it limited revenue. Most of these nine were established businesses in Waterton who would like to see the expansion of the season considered by adding activities and events within the park during the fringe times and the off-season;
- Nineteen businesses (21%) mentioned other challenges including accessibility to reliable Internet, the economic slump, building inadequacies, and lack of local or shuttle transportation;
- Fourteen businesses (16%) could identify no immediate challenges.

Section 4 – Future Plans for the Business

The future plans section asks respondents the simple question "How likely is your business to do each of the following in the next two years?"

The question was broken up into several sub-components designed to evaluate whether the business was in a growth, stagnant, or declining stage in its life cycle. Respondents were asked to rate 19 questions on a scale of one to five as to how likely or unlikely they were to undertake certain activities over the next two years

The table below reflects solid numbers in most **likely** and **very likely** responses to 13 of the 19 questions. This would appear to establish the basis for a stable business community, though the indicators for business growth are less apparent as ten of the thirteen questions drew responses of **likely** as opposed to **very likely**. In addition, the nature of these businesses and their location gives them much less latitude, and in some instances less incentive, for growth.

Of some concern should be the number of businesses not considering facility expansion or redesign, and those not considering an injection of financial capital. Though this again reflects the nature of business activities in the region such as bed and breakfasts, comments made suggest it may also reflect obstacles these businesses face in their respective jurisdictions.

How likely is it that your business will do each of the following over the next two years?					
Answer Options	Very Unlikely	Unlikely	Haven't Considered	Likely	Very Likely
Add a new product or service	14	10	9	**28**	**28**
Sell to a new market	15	16	13	**33**	12
Research new markets	15	11	21	**34**	8
Expand distribution channels	17	17	12	**32**	11
Expand advertising and promotion	14	14	16	**26**	19
Invest in new equipment	18	23	6	13	**29**
Replace current equipment	12	11	4	20	**42**
Expand or relocate current facilities	**42**	22	6	11	8
Redesign current facilities	**27**	21	8	25	8
Seek additional financial capital	**33**	23	9	15	9
Computerize current operations	9	7	2	19	**52**
Upgrade computer systems	19	**28**	3	21	18
Redesign operating activities	12	**31**	13	25	8
Expand the scope of operating activities	14	21	9	**33**	12
Seek professional or technical advice	13	24	13	**26**	13
Add unskilled labour	19	23	3	**33**	11
Add skilled labour	16	26	4	**30**	13
Invest in onsite training for employees	21	10	7	**35**	16
Invest in off-site training for employees	21	**31**	7	20	10

Based on the responses given, over the next two years:

- Sixty-three percent of respondents (56) indicate that it is **likely** or **very likely** they will add a new product or service to their business, 28 businesses consider this **very likely**;
- Fifty-one percent of businesses (45) feel it is **likely** or **very likely** they will sell to a new market, only 12 businesses consider this **very likely**;
- Forty-seven percent of businesses(42) consider it **likely** or **very likely** they will research new markets, only 8 businesses stated this as a **very likely** activity;
- Forty-eight percent of owner/operators (43) indicate they are **likely** or **very likely** to expand their distribution channels; only 11 businesses feel this is **very likely**;
- Fifty-one percent of businesses (45) consider it **likely** or **very likely** they will expand advertising and promotional activities, 19 businesses consider this **very likely**;
- Forty-seven percent of businesses (42) will **likely** or **very likely** invest in new equipment, 29 businesses said this was **very likely**;
- Seventy percent of businesses (62) will **likely** or **very likely** replace existing equipment, 42 businesses consider this **very likely**;
- Eighty percent of operations (71) are already computerized or it is **likely** or **very likely** they will computerize, 52 businesses consider this essential under the **very likely** category;
- Fifty-one percent of operations (45) are **likely** or **very likely** to expand the scope of business activities, only 12 businesses responded **very likely**, 35% had not considered the activity;
- Forty-four percent of businesses (39) are **likely** or **very likely** to seek professional or technical advice, 13 businesses are **very likely** to do so;

- Forty-nine percent of owner/operators (44) are **likely** or **very likely** to add skilled labour, only 11 businesses see this as **very likely**;
- Forty-nine percent of owner/operators (43) are **likely** or **very likely** to add skilled labour, only 13 businesses see this as **very likely**. The challenge is availability to locate and attract staff;
- Fifty-seven percent of owner/operators (51) will **likely** or **very likely** invest in onsite training for employees, only 16 businesses indicated this was already happening or was **very likely** to occur;

Six questions elicited negative responses with **unlikely** or very **unlikely** responses. Information can also be deduced from these results:

- Seventy-two percent of owner/operators (64) are **unlikely** or **very unlikely** to expand or relocate their current facilities; 42 businesses considered this a **very unlikely** activity;
- Fifty-four percent of owner/operators (48) are **unlikely** or **very unlikely** to redesign their current facilities; 27 businesses considered this a **very unlikely** activity;
- Sixty-three percent of businesses (56) are **unlikely** or **very unlikely** to seek additional financial capital for their business, 33 businesses considered this **very unlikely;**
- Fifty-three percent of owner/operators (47) are **unlikely** or **very unlikely** to upgrade their computer systems; 19 businesses are **very unlikely** to do so;
- Forty-eight percent of businesses (43) are **unlikely** or **very unlikely** to redesign their current facilities, 12 businesses considered this **very unlikely;**
- Fifty-eight percent of owner/operators (52) are **unlikely** or **very unlikely** to invest in off-site training for employees, 21 businesses said this was **very unlikely** to occur.

Responses to four questions in this section ranked very flat and were very close to negative in tone. The margins of difference were as follows:

	Likely/Very Likely	Unlikely/Very Unlikely
Invest in new equipment	47.2% (42 responses)	46.1% (41 responses)
Seek professional or technical advice	43.8% (39 responses)	41.6% (37 responses)
Add unskilled labour	49.4% (44 responses)	47.2% (42 responses)
Add skilled labour	48.3% (43 responses)	47.2% (42 responses)

Inferences that can be drawn from this information may include the following:

- The modest number of **very likely** responses to ten of the thirteen questions with an overall positive trend may indicate a desire towards pursuing these activities, but not a commitment. It may also suggest an acceptance that though they would like to pursue certain activities, obstacles may presently prevent them from doing so. Some businesses may not be able to find appropriate facilities in their present location. This was very true of businesses in the Village of Waterton whose comments reflected this deficiency;
- The responses may also indicate that several businesses are restricted from expanding due to development obstacles, bylaws etc. which impede, delay or inhibit progress. Comments were made concerning cooperation with municipal representatives (council and administration) and Parks Canada, as the lack of open regular communication on policies and programs. In the village of Waterton for example, Parks Canada was mentioned regularly as impeding business

development and expansion, meeting accommodation needs, and assisting the village in maintaining infrastructure. These are issues that each jurisdiction will have to address;

- Certain conclusions may be drawn for the percentage of owner/operators that state it is **unlikely** or **very unlikely** they will redesign their current facilities. Redesigning facilities that are leased or where the business is uncertain about its future location or existence inhibits decision making. Regulations, legislation, and/or bylaws restricting renovations to an existing structure or requiring the incorporation of certain design elements into a new buildings hinder these decisions as well. Improved communication with the business community can help address this issue;
- Finally, business owner/operators, though **likely** or **very likely** to fill both skilled and unskilled positions, are challenged in hiring staff. Both kinds of positions are required by businesses. However, businesses face a high turnover rate because of seasonal employment and the rural location where many of their operations are situated. Employee retention must be addressed by developing job security and/or alternative employment for individuals in seasonal employment, by addressing the challenge of accommodation shortages for staff and family in certain communities, and by enhancing the quality of life factors in each jurisdiction.

Businesses were also asked several specific questions about their staff:

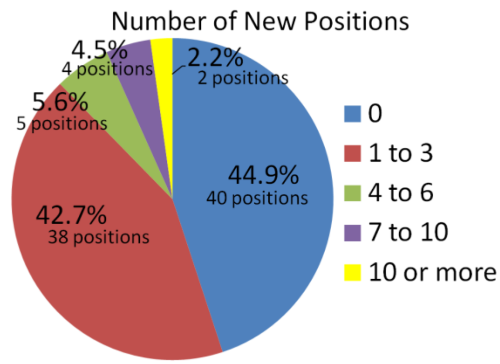
1. **Describe the positions your business requires or for which you regularly seek staff.**

   Sixty-one businesses (69%) required skilled staff of one kind or another. A majority of these positions often required post-secondary training or certification. These included positions in the construction, the trades, truck drivers and equipment operators (27 positions) professionals, semi-professionals, apprentices, and technicians in different industries and persons with unique skill sets (25 positions). Fifteen businesses required managerial or administrative staff, while nine required business support staff;

   Fifty-nine businesses (66%) indicated they utilize unskilled, untrained, or less experienced labour that normally did not require a post-secondary background. Many of these positions are temporary, seasonal, or casual in nature. Twenty-one businesses (22%) require retail sales inventory and stock staff. Fifteen businesses (11%) require maintenance staff for building or yard maintenance, while thirteen businesses staff for housekeeping services. Twenty-three food service positions required staffing for various duties including serving, bussing, dishwashing, and cleaning. Thirteen businesses identified the need for casual or general labourers for a variety of tasks. **A list of all these jobs is provided in Appendix B.**

2. **How many positions are presently vacant?**
   - Seventy-nine percent of all businesses (70) interviewed, indicated they had no vacancies;
   - Seventeen percent (15 businesses) presently have between one and five positions to fill;
   - Only four businesses had over five vacancies at the time of the survey;
   - Of the nineteen businesses presently looking for staff, the average number of vacancies is just over four persons. There is an aberration in this number with one business seeking to fill 30 positions. Taken out the equation the average number becomes 2.6 persons per business.

3. **What is the number of new positions you expect to add over the next five years?**



- Fifty-five percent, 49 businesses, plan on adding new staff to their operations over the next five years. The challenge in many instances is, as was noted earlier, locating and retaining the staff with the qualifications they require;
- Forty-five percent, or 40 businesses, expect to add no new positions over the next five years. While this does not include employees they will replace through loss, retirement, etc., it represents a high number and may signify that these employers have little intention to grow or expand. It may also indicate a stagnating regional economy or reflect the type of business operation;
- Of the 78 businesses planning to add new staff, the average number of positions to be added is just over four persons per business.

4. **Are you currently able to attract the required workers for your business?**
- Forty-nine owner/operators (55%) answered yes to this question, while 40 respondents (45%) answered no. This reveals a major issue employers face. The challenge of filling these vacancies is as noted above largely a result of seasonal employment and the inability to attract staff to rural communities and offer staff stability and a satisfactory quality of life.

  Maintaining economic stability and preparing for future economic growth requires an affirmative commitment be made to employee attraction and retention by municipalities, the business community and community development stakeholders addressing these issues.

5. **If you have unfilled positions, what are the types of skills you are currently unable to obtain?**
- Forty-six businesses responded with details on 69 positions they were seeking to fill. Twenty-eight businesses (32%) required some type of skilled labour, while 18 businesses (20%) were looking for unskilled labour. "Unskilled" should be qualified as positions not necessarily requiring experience or training. Many staff are trained once they are in their position.

Skills/Position Required	Number
Construction & Trades	16
Sector Specific Skills	16
Management & administration	7
Retail	9
Food Services	8
Hotel/Motel	7
General Labour – unskilled and/or unseasoned	6
Total	69

6. **How many current employees do you anticipate will retire or leave over the next five years?**

   Thirty-four businesses (38%) expected no staff turnover. Forty-two businesses (47%) anticipated losses of one to five employees. Five businesses (6%) forecast losses of six to ten employees, while four businesses (5%) forecast losses of eleven to twenty staff, and another four saw losses of over 20 staff over the next five years. The fact that over sixty percent of these businesses expect staff losses over this period should again indicate the importance of addressing the employee attraction and retention issue.

   Of the fifty-five businesses anticipating staff turnover, the average number of positions lost is calculated to be just over four employees per business. When seasonal employment is averaged in, this number is estimated at just over 2.5 employees per business, still a significant figure.

   If you consider the number of businesses with only one employee (effectively the owner) at nineteen businesses and cross-reference that with those same businesses that anticipate one employee to retire from or leave the business, six of the businesses interviewed in the project have plans to close their doors unless some plan for transition is in place. An additional three bed and breakfast operations interviewed also plan to close their doors.

Owners and operators were asked four questions regarding importing and exporting:

1. **Do you export or plan to export to markets outside the region?**
   Eighty-four businesses (94%) responded that they did not export nor did they have plans to export. Five businesses (6%) interviewed confirmed they do export or plan to export.

2. **Do you import or plan to import from markets outside the region?**
   Seventy-three businesses (82%) responded that they did not import nor did they have plans to import. Sixteen businesses (18%) interviewed confirmed they do import or plan to import.

3. **Do you require further assistance or information on export strategies?**

   Eighty-one businesses (91%) of businesses responded that they did not need assistance or information on export strategies. Eight businesses (9%) interviewed indicated they would appreciate information on export strategies. These businesses will be assisted directly by CFABSW.

   The potential opportunity to provide training, a course or seminar in the region, not only to the businesses requesting the information, but to a potential broader audience may exist.

4. **What obstacles do you face in attempting to export?**
   Sixteen obstacles were listed. Thirteen dealt with legal issues; permits, duties, legalities, time delays, and the paperwork required getting items across the border or to export to international markets. Four addressed the challenge of working with customs brokers, while another four discussed the high duties and tariffs they face. One comment dealt with a request for information on how to proceed and can be addressed directly by CFABSW.

Section 5 – Community Services

The objective of the community services section was to query owners and operators on their perception and satisfaction with 20 community services located within the three jurisdictions. Several of these services are provided by the municipal jurisdictions, others by the province and still others by organizations within each constituency. This section, in addition to evaluating the satisfaction level that business owner/operators have with these services, is designed to gauge these services in terms of quality of life provided in the region.

Respondents were asked to provide a rating from one to five for each service. A one “did not apply”, two was “very unsatisfied”, three “slightly satisfied”, four “satisfied”, and five “very satisfied”:

- Fifteen of the 20 services listed **satisfied** or **very satisfied** as their top response. Four areas ranked **did not apply** as their top response, these included sewer services, water services, local transportation, access to post secondary training, and access to industry training;
- All 15 of the services which rank **satisfied** or **very satisfied** first in their category, ranked **satisfied** higher than the **very satisfied** option, possibly indicating there is always room for improvement;
- Ordered from the largest number of **satisfied** or **very satisfied** responses the services were ranked as follows: highway conditions first followed by gas services, other quality of life factors, police services, health care, local recreation and leisure facilities, traffic signage, ambulance services, electrical services, education (K to 12), locally supplied services and products, business/municipal signage, adequate and appropriate housing, local roads, and business support services;
- The four services which rank lowest on the satisfaction scale that can be affected by the municipal jurisdictions are business support services, local roads, adequate and appropriate housing, and business and municipal signage. These should be viewed as areas where jurisdictions can actively effect growth and development;
- Highway conditions, natural gas services, and other quality of life factors ambulance services, and police services all received more than of 69 or responses in the **satisfied**/**very satisfied** option. That correlates to a total satisfaction rating of 75% or above for the provision of these services;
- Five services – local roads, business/municipal signage, adequate and appropriate housing, locally supplied services and products, and business support services, capture a degree of dissatisfaction through their **slightly satisfied** and **very unsatisfied** rankings with a rating between a 38.2% to 52.8% **slightly satisfied** or **very unsatisfied**;
- Local transportation and industry training were noted by 69.7% and 67.4% of respondents respectively as **does not apply** for they felt these services were not present in their community or jurisdiction.

Please Rate Your Satisfaction With the Following Community Services					
Answer Options	**Does not apply**	**Very Unsatisfied**	**Slightly Satisfied**	**Satisfied**	**Very Satisfied**
Police Services	9	5	6	**48**	21
Ambulance Services	15	11	3	**42**	18
Health care	5	13	5	**46**	20
Electric Services	4	15	14	**43**	13
Gas Services	9	0	6	**53**	21
Sewer	**43**	1	4	30	11
Water	**32**	5	3	**29**	20
Local Roads	1	24	23	**31**	10
Traffic signs and lights	6	14	8	**50**	11
Business and municipal signage	9	17	17	**38**	8
Highways	1	3	3	**52**	29
Adequate/Appropriate Housing	9	26	9	**38**	7
Local transportation	**62**	**13**	1	8	4
Education (K to 12)	29	2	5	**34**	19
Education (Post-Secondary)	**37**	5	10	28	9
Industry Training	**60**	**8**	7	8	6
Locally Supplied Services and products	3	24	13	**36**	13
Business Support Services	15	17	18	**32**	8
Local Recreation & Leisure Facilities	6	7	11	**45**	19
Other quality of Life Factors	3	5	6	**32**	42

In addition to the rating chart comments were captured on these services where offered:

- Under **police services**, six comments were made. Five concerned the lack of a visible presence in the community or jurisdiction, while one concerned slow response times to reported incidents or requests for assistance;
- Of the nine comments made regarding **ambulance services**, seven noted the inefficiency/inability of park ambulances in Waterton Lakes National Park to transport patients to local hospitals without transferring them, one mentioned concerns over slow response times, while another applauded the services in the region as top-notch;
- Ten comments were made concerning **healthcare**. Seven comments discussed limited or, in the case of Waterton, no access to healthcare services. Two indicated the slow delivery and poor quality of services provided, while one acknowledged the distance necessary to travel for adequate services was an issue;
- Fifteen comments were captured regarding **electrical services**. Eleven dealt with poor local capacity, poor reliability and service, and sporadic power outages leading to loss of office and business productivity. Five concerned the high and increasing cost of these services;
- Eight comments were made about **water and sewer services**. Four comments concerned lack of access to a reliable water source. Two comments discussed the need to address flooding and upgrade aging infrastructure, while two indicated issues dealing with their municipalities on licensing and permits;
- Feedback on **local roads** was provided by 35 businesses. Nineteen of these responses regarded overall poor maintenance from road grading to snow plowing and snow removal. Thirteen businesses commented on the general poor repair of roads in the community from potholes to unattended repairs, inadequate resurfacing, and pooling of water leading to erosion. One

comment concerned the effect high traffic volumes had on creating a washboard effect on gravel roads in the jurisdiction, one discussed how spring road bans had an economic effect on their business, while another noted the challenge of congestion due to traffic volumes in Waterton;

- Nine respondents commented on **traffic signage**. Six comments referred to the confusion of signage in rural jurisdictions and the Village of Waterton. One comment noted the shortage of traffic signage around the playground in Waterton, one discussed the inability of signage to effectively control speeding, while one suggested that intersections in the County were not being effectively controlled;
- Eighteen respondents commented on **business and municipal signage**. Eleven businesses felt existing signage bylaws and legislation were too restrictive and need to be reviewed by each of the three jurisdictions. Four businesses felt that the municipalities and chambers of commerce should support businesses by assisting in signage to promote businesses. One business indicated that the MD of Pincher Creek was slow in putting up and in repairing knocked over signage. Another business was frustrated with the lack of response from the County to its request to put up signage;
- Response to the condition of **highways** in the region evoked four responses. All four consisted of general comments concerning winter maintenance and the plowing of highways;
- Twenty-two comments were received concerning **adequate & appropriate housing**. Seventeen respondents pointed out the shortage of low-income or affordable housing, especially rentals in the three jurisdictions. It is important to indicate that ten of these comments concerned the inadequacy/unavailability of rental accommodation for staff in the Village of Waterton. Five respondents noted the discrepancy between price and affordability for potential homeowners. Market prices are presently out of sync with affordability;
- **Local transportation** was commented on by eight respondents. All eight indicated that it did not exist, but that there certainly was a need, even to a limited degree, to provide some service like a shuttle on a daily basis to Cardston or Pincher Creek;
- Only three responses were received regarding **education (K-12)**. One discussed the high quality of education in the region, but noted the challenge of transporting children to Cardston. One suggested the standards could be improved, library funding is suffering and there was a need for access to new resources, while another noted that there was nothing available in Waterton;
- Feedback on **post-secondary education** was provided by six businesses. All six respondents reported that there is a shortage of post-secondary course offerings in their region. Access is poor and improvements could be made;
- Responses to **industry training** reflected a similar trend as post-secondary education. Five comments were offered. All indicated that there was no, or very limited, opportunity for industry training in their region;
- Twenty-three businesses commented on the **Supply of Local Products and Services**. Nineteen indicated that local businesses could not address much or any of their needs for business to business products and services and that it was necessary to shop outside the community for many items. Two owner/operators introduced competitive pricing as an issue and that in order for them to provide competitive rates to their customers they needed to seek outside suppliers. One business noted their supply could be met with the exception of specialty equipment, while another noted Walmart and Coop in Pincher Creek were the main resources for their supplies;

- Twenty comments were made regarding **business support services**. Eleven respondents feel the municipalities and other business support agencies do a poor job supporting the business community. They must become more involved in supporting business growth; they need to address long-term strategic growth. Six businesses recognize that services probably exist but that a better job needs to be done communicating with businesses and promoting these services. One business suggested that more development services need to be provided, while another indicated the service provided often depends on the situation and who you are. One respondent commended the County on its level service;
- Five responses were received regarding **local recreation & leisure facilities**. All five referenced limited access to, or total lack of, facilities and activities in their area;
- **Quality of life** was commented on by seven respondents. Three indicated lack of certain basic amenities as leading to a slightly less than satisfactory quality of life. Two comments referenced the relaxing and enjoyable aspect of rural life. One respondent found the lack of reliable high-speed Internet access a deterrent to their quality of life, while another discussed the negative direction the Village of Waterton and its economy seemed to be heading in and suggested that several issues need to be responded to and decisions made to prevent further economic erosion.

Section 6 – Entrepreneur Support Services

This section of the survey was included to gauge respondent's awareness of and satisfaction with business and entrepreneurial support services provided to the community by various organizations. It included nine questions:

1. **Are you aware of Community Futures Alberta Southwest (CFABSW) and the services they provide?**

   Forty-six respondents (52%) confirmed they were aware of Community Futures and the services they provide.

   Forty-three businesses (48%) , were unaware of CFABSW. Hopefully this project has had some impact on awareness of the organization and the services we can provide. However, we will have to continue our work to increase the visibility of the organization, its goals and programs for rural entrepreneurs. Information is available by contacting the CFABSW office at 1-800-565-4418 or checking out our website at www.cfabsw.com.

2. **Have you utilized the services of Community Futures Alberta South West?**

   Only sixteen respondents (18%) of the 89 interviewed had utilized the services of CFABSW or its predecessor Southwest Alberta Business Development Institute (SWABDI) in the three jurisdictions. This indicates a need to find effective methods to promote our organization and the services we provide to businesses and potential entrepreneurs in the region. With an increased awareness of the organization's programs and information about the assistance we can provide to entrepreneurs, a secondary goal of this project, this number can increase.

3. **Do you presently require any additional information on CFABSW services?**
Thirteen respondents (15%) indicated they would like further information about Community Futures Alberta Southwest programs. Information packages will be forwarded to these businesses.

4. **Are you a member of the regional chamber of commerce?**
Thirty-nine respondents (44%) indicated they were chamber members, while 50 respondents (56%) indicated they were not members of the chamber.

5. **If not a member, Why?**
Of the 52 responses received, 16 felt that the chamber had no relevance, could not support their business or was an ineffectual organization in the region. Eleven could cite no particular reason for not being a member. Nine respondents felt that their regional chamber did not provide services to rural businesses. Eight had never been approached to join. Four were just too busy to get involved, while three suggested the rising cost of membership fees were a deterrent, and one business indicated they supported the community in other ways.

6. **Are you receiving value from your chamber membership?**
Of the 39 owner/operators that indicated they were chamber members, 30 (77%) felt they were receiving value, while nine (23%) indicated they were not presently receiving value from their membership.

   This reflects a strong satisfaction level for the chamber among its members. However, close to 25% of members indicate a level of dissatisfaction and suggests some improvements need to be made. Many of the responses found in question eight below may hint to why a certain segment of businesses do not have a chamber membership, or do not feel they are receiving value for the membership they have.

7. **As a business owner, do you feel the chamber provides value to the community?**
Fifty-nine respondents (66%) out of the total 89 felt the chamber did provide value to the community and district, 14 businesses (16%) suggested the chamber did not provide value to their jurisdiction, while 16 businesses (18%) indicated they did not have enough information on chamber activities to comment.

8. **What specific initiatives would you like the chamber to undertake?**
For thirty-five of the 89 owner/operators surveyed (39%) no ideas immediately came to mind, although they were encouraged to contact their chamber should they have thoughts to share in the future. Twenty owner/operators (23%) did not have enough information on chamber activities to comment. Thirty-nine comments were provided by the remaining 34 businesses.

   Ten businesses expressed the need for the chambers to work with the business community to develop improved advertising and promotional initiatives. Nine businesses suggested these organizations should focus on improving business advocacy on a number of issues. Seven respondents felt the chambers need to promote their services and communicate better, both with their membership and the business community. Six businesses would like to see the chambers engaged in mentorship and networking activities to support the business community. Two businesses suggested they would like to see effort spent on events that would draw tourists to the region; another two noted their local chamber was doing a fine job. Two comments indicated the chamber should work with the municipality on development issues, while one suggested the chamber's activities should benefit the whole community, not just a select few.

9. **List any additional comments you have or information you would like to receive from the Community Futures Alberta Southwest, the Cardston County, the Village of Waterton, or the MD of Pincher Creek.**

   CFABSW – Seventy respondents (79%) indicated they did not require any further information at this time from CFABSW. Eight owner/operators (9%) requested a basic information package. Three businesses requested specific information on loan products, while one requested a copy of the final summary report. Of the remaining five requests, four concerned training; one concerned import/export information, one for alternative sources of funding, one for information on starting a business in Alberta, and one on Parks Canada business operations in Waterton.

   Of the 89 businesses interviewed 70 businesses from all jurisdictions (79%) indicated they did not have any additional comments or require any further information.

   Cardston County – Of the nine comments made regarding the County, five respondents indicated the County should work more progressively to promote the development of new and existing business and industry and focus on growth opportunities. Two respondents indicated the need for the County to communicate more effectively with the business community on activities related to bylaws, regulations and development plans. One respondent suggested that the high business taxes in the County should be reviewed, while another wanted to see the County's assistance in attracting specific businesses to its community.

   Village of Waterton – Five comments were received concerning the Village of Waterton. Three concerned the relationship between the Village and Parks Canada and the necessity for both parties to work cooperatively on the issues of park maintenance and infrastructure, economic development and expansion, bylaw enforcement, park beautification, and park usage strategies. One comment addressed the need for the Village, Parks Canada, and possibly the County to find a solution to the chronic issue of staff housing shortage in the park. Finally, one respondent suggested the Village, Parks Canada and the Waterton and District Chamber of Commerce need to establish more productive lines of communication with the business community.

   MD of Pincher Creek – Ten responses were received from businesses in the MD. Six businesses commented on the need for the MD to increase its support for businesses through promotion and advertising of existing businesses and the development and implementation of a business attraction strategy. The remaining four comments concerned single issues including: the need to sort out the flooding situation on gravel roads in the southwest region of the MD, having the MD develop of policy to maintain range lands, receiving more MD services for taxes paid, and ensuring the MD is representing its constituents' interests.

Conclusion

The results of the project provide an honest representation of the Cardston County, Village of Waterton, and MD of Pincher Creek business communities' impressions on issues from basic business activities, to market conditions and established primary market bases, to future plans and potential needs, labour force requirements, and the community's strengths and weaknesses as a place to do business.

Fifty-nine percent, or 89 businesses responded to the survey over a three-month period. The project had good representation from all primary sectors, though it was more heavily weighted in the service sector, especially with the tourist related businesses such as bed and breakfasts in the region. This also attributed to the large number of home-based businesses interviewed. Thirty-five (39%), were home-based in this project; a larger percentage than any other project in this study.

Another note worth acknowledging is that a large number of these businesses, approximately 36 (40%) are seasonal in nature. There are several issues which surround this that need to be further analyzed. Seasonal employment affects the retention of staff, the revenue a business can draw, and it's operating expenses to mention a few. Some businesses would like to see operating seasons extended, while others prefer the status quo. These are issues which need to be discussed with the business community in each jurisdiction so that all voices can be heard and informed decisions made.

The feedback from and analysis of this study will provide input into what each jurisdiction requires to grow and where the potential for growth lies. It will equip leaders with the information they need to make informed decisions about what affects our business community.

As expressed by many of the owners and operators interviewed, who made a commitment of time to participate in this project, this document provides valuable information and can be a useful resource if initiative is taken, and recommendations are considered and acted upon for the benefit of all stakeholders involved.

Appendix A

Business Visitation Survey

Community Futures Alberta Southwest

SECTION I: Primary Business Data

Date: ______________________

Survey Entry Number:- ______________________
Business Name: -------- ______________________
Owner/Primary Contact ______________________
Mailing Address:-------- ______________________
Street Address: --------- ______________________
Phone: -------------------- ______________________
Cell Phone: -------------- ______________________
Fax:------------------------ ______________________
Email: --------------------- ______________________
Website: ------------------ ______________________
Regular Business Hour ______________________

SECTION II: About the Business:

1. How many total years of personal business experience do you have?-------------------- ________
2. How many years of experience in this specific business activity do you have? ---------- ________
3. What year was this business originally started?--- ________
4. What percent of the business do you own?-- ________
5. The business was established in the region because of:
   proximity to market ________ proximity to home _________ other ________
6. What year did you become the owner/manager of this business?-------------------------- ________
7. Which best describes how you came to own/manage this business? ________
   a) Purchased the business -- ________
   b) Started the business -- ________
   c) Other--- ________
8. How is this business organized? ________
   a) Sole proprietorship --- ________
   b) Partnership-- ________
   c) Corporation--- ________
   d) Franchise --- ________
   e) Other (list) --- ________
9. How many family members are investors in this business? ------------------------------- ________
10. Is the business premises? owned ___________ leased ___________ home-based ________
11. Is the business location? accessible ______ adequate _______ out-of-the-way ________
12. Is the business facility size? adequate __________ too small ___________ too large ________
13. Which best describes this primary business activity? ________
    a) Service --- ________
    b) Retail --- ________
    c) Food and Beverage -- ________
    d) Finance/insurance/real estate --- ________
    e) Business and professional services-- ________
    f) Wholesale/distribution ---
    g) Primary Sector Activity

i. Energy--- ____________
ii. Agriculture--- ____________
iii. Manufacturing --- ____________
iv. Construction --- ____________
v. Transportation-- ____________
vi. Tourism/Recreation -- ____________
vii. Other-- ____________

14. Describe your primary product or service ____

____

15. In an average week, how many hours do you devote to your business?------------------ ____________

16. How many employees do you have?--------------------------------------- _________________________

a. Full-time ____________________ b. Part-time ____________________

SECTION III: Market Conditions

17. Where is your greatest market competition from?

Local ______ Regional ______ National ______ International ______ No Competition ______

18. What are your business' greatest competitive advantages?

Location____ Product/Service____ Customer Service ____ Loyalty ____ Other (List)_____________

19. What target markets or customers are essential for the success of your business?

____

20. What aspect of your business offers the greatest potential for growth?

____

21. What methods of business promotion are most effective for you?

Radio ___ Newsppr ___ Industry Ads ___ INet ___ E-mail ___ Word-of-M ___ Other (list)_________

22. Is the competition in your market: Why? ____

Increasing? ___________ Decreasing? ___________ Staying the same? ___________

23. Is your market share in the region: Why? ____

Increasing? ___________ Decreasing? ___________ Staying the same? ___________

24. Have you or your staff taken courses/programs on?

Marketing and Market Research ☐ Financing ☐ Accounting ☐ Business Planning and Plan Updating ☐ Customer Service ☐ Business Transition Planning ☐ Bidding on Government Contracts ☐ Social Media ☐

25. Would you or your staff attend one of the following if offered in the region?

Marketing and Market Research ☐ Financing ☐ Accounting ☐ Business Planning and Plan Updating ☐ Customer Service ☐ Business Transition Planning ☐ Bidding on Government Contracts ☐ Social Media ☐

COMMENT: What are your businesses' greatest challenges and its greatest advantages or opportunities in its present location?

SECTION IV: Future Plans for the Business:

26. How likely is your business to do each of the following in the next two years?

Please use the following scale in answering these questions: Circle the Best Response.

1=very unlikely 2=unlikely 3=haven't considered this 4=likely 5=very likely

a. Add a new product or service --------------------------------					
b. Sell to a new market--					
c. Research new markets --					
d. Expand distribution channels---------------------------------					
e. Expand advertising and promotion -------------------------					
f. Invest in new equipment --------------------------------------					
g. Replace current equipment-----------------------------------					
h. Expand or relocate current facilities ------------------------					
i. Redesign current facilities ------------------------------------					
j. Seek additional financial capital -----------------------------					
k. Computerize or have presently computerized operations					
l. Upgrade computer systems ----------------------------------					
m. Redesign daily operating activities--------------------------					
n. Expand the scope of your operating activities ------------					
o. Seek professional or technical advice ---------------------					
p. Add unskilled labour---					
q. Add skilled labour --					
r. Invest in onsite training for employees---------------------					
s. Invest in offsite training for employees---------------------					

i. Description of positions you hire for ---------------------- ____________________

ii. How many positions are presently vacant --------------- ____________________

iii. # of positions expected to add over next 5 years ------ ____________________

iv. Are you currently able to attract the required workers for your business? Yes ________ No________

v. If no, what are the types of skills that you are currently unable to obtain? ____________________

vi. How many current employees do you anticipate will retire or leave over the next five years? ____________________

27. Is your businesses' primary market
Local? ________ Regional? _________ National? ________ International? ________

28. Do you export (yes, no) or plan to export(yes, no), to markets outside the region?

29. Do you import (yes, no) or plan to import (yes, no) from markets outside the region?

30. Do you require assistance or information to develop an export/import strategy? Yes ____ No ____

31. What obstacles do you face in attempting to export? ______________________________

SECTION V: Community Services:

32. Rate your satisfaction with the following community services

Please use the following scale in answering these questions: Circle the Best Response.

1=does not apply	2=very unsatisfied	3=slightly satisfied	4=satisfied	5=very satisfied	
a. Police Services					
b. Ambulance Services					
c. Health care					
d. Electric Services					
e. Gas Services					
f. Sewer					
g. Water					
h. Local Roads					
i. Traffic signs and lights					
j. Signage – Business and Municipal					
k. Highways					
l. Adequate/Appropriate Housing					
m. Local transportation					
n. Education (K to 12)					
o. Education (Post-Secondary)					
p. Industry Training					
q. Locally Supplied Services and products					
r. Business Support Services					
s. Local Recreation & Leisure Facilities					
t. Other quality of Life Factors					

SECTION VI: Entrepreneur Support Services

33. Are you aware of Community Futures Alberta Southwest (CFABSW) and the services they provide? Yes ___________ No___________

34. Have you utilized the services of Community Futures Alberta Southwest? Yes _____ No____

35. Do you require further information on CFABSW services? Yes _____ No____

36. Are you a member of the regional & chamber of commerce? Yes ____ No____

37. If not a member, why? ____

38. As a member, are you receiving value from your chamber membership? Yes _____ No____

39. As a business owner, do you feel the chamber provides value to the community? Yes ___ No ___

40. What specific initiatives would you like to see the Chamber undertake? ________________________

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41. List any Comments you have, or additional services or information you would like from Community Futures Alberta South West, Cardston County, the MD of Pincher Creek, or the Village of Waterton.

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Positions Requiring Post-secondary Training, Certification, Skilled Labour		
Management/Administration		
Administrative staff		
Administrative staff		
Assistant manager		
Assistant manager		
Assistant managers		
Banking clerk		
Golf course management skills		
Management		
Management		
Management		
Management, administration		
Manager		
Manager/B & B operator		
Manager/B & B operator		
Managers	Subtotal:	15
Business Support Personal (Assistants)		
Apprentice consultants		
Apprentice electrician		
Apprentice jeweller		
Apprentice or experienced plumber		
Assistant		
Assistant ferrier		
Assistant sales agent		
Line cooks		
Realtor assistant	Subtotal:	9
Technicians/Professionals & Semi-professionals		
Accountants		
Art consulting and sales		
Experienced Class 5 driver		
Experienced driver, machine operator		
Graphic artist		
Horse wrangler		
International marketing, customer services, effective writer		
Landscaping, reclamation, and environmental staff		
Marketing/sales/group booking staff		
Public relations		
Tow Truck operator, Dispatcher	Subtotal:	11

Positions Requiring Post-secondary Training, Certification, Skilled Labour		
Trades Staff		
Automotive technicians		
Automotive technicians		
Cabinet makers		
Carpenters		
Carpenters assemblers		
Certified cooks		
Chefs		
Cooks		
Cooks		
Cooks		
Cooks		
Cooks		
Cooks		
Cooks		
Cooks		
Installer, cabinet maker		
Log craftsmen or women		
Machinists		
Mechanic; Sales personel		
Mechanics,		
Plumbers, Installers		
Service Mechanic		
Sous Chef		
Stone and brick masons, experienced trades staff		
Welders	Subtotal:	25
Unique Skill Sets		
Assistant web designer		
Commentators and interpreters		
Guides		
Guiding positions. skilled riders		
Information tech staff		
Riders/guides		
Virtual assitant to aid with technology and communications, website manager,	Subtotal:	7
Positions Requiring Post-secondary Training, Certification, Skilled Labour Total:		67

General Labour, Unskilled, or Staff to be Trained On-site		
General farm labour; physical labourer		
Assistance with grounds maintenance		
Building maintenance		
General labour		
General labour		
General labour		
General labour		
General labour		
General labour		
General labour		
General labour		
General labour		
General labour		
General maintenance		
Groundskeeper		
Groundskeeping		
Labourer		
Labourers		
Maintenance		
Maintenance		
Maintenance		
Maintenance		
Maintenance		
Maintenance staff		
Outdoor work staff		
Yard maintenance		
Yard maintenance		
Yard maintenance	Subtotal:	28
Food Services/Hotel & Motel		
Assistance in several areas - bookings, hospitality services		
Bar tenders		
Bussers		
Cleaner, housekeeper		
Cleaners		
Cleaning		
Cleaning staff		
Cleaning staff		
Cleaning staff		
Cleaning staff		
Cleaning staff		
Cleaning staff		
Deli worker		
Desk staff		
Dishwashers		
Dishwashers		
Dishwashers		
Front desk staff		

General Labour, Unskilled, or Staff to be Trained On-site (cont'd)		
Front desk staff		
Front desk staff		
Front-end customer services and sales		
Honest, hard working, dependable sandwich artists		
Housekeeping		
Housekeeping		
Housekeeping		
Housekeeping		
Housekeeping		
Housekeeping		
Housekeeping		
Housekeeping staff		
Information assistants		
Servers		
Servers		
Servers		
Servers		
Servers		
Servers		
Servers		
Servers		
Servers		
Servers		
Servers		
Servers	Subtotal:	43
Retail - Sales/Customer Service/Clerks (unskilled)		
Cashier		
Cashier		
Cashiers		
Cashiers		
Clerical,		
Clerk/basic store duties, display, cleaning		
Clerks		
Clerks, sales staff,		
Retail associates		
Retail clerks		
Retail clerks		
Retail sales		
Sales		
Sales clerk		
Sales clerks		
Sales clerks		
Sales staff		
Sales staff,		
Store clerk		
Store clerk, cleaning, stocking shelves		
Store clerk,Helpers/support staff,	Subtotal:	21
General Labour, Unskilled or Staff to be Trained On-site Total:		**92**

Notes

Notes

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