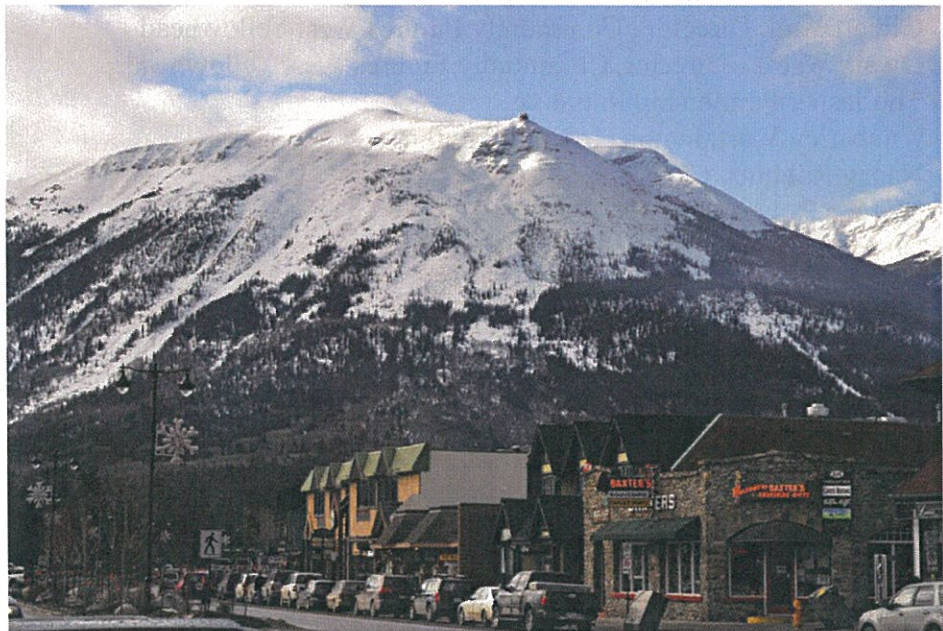


JASPER BUSINESS VISITATION STUDY



January 2015

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Disclaimer:

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Executive Summary

Business Retention and Expansion (BRE) is a community economic development tool used to encourage growth and stability for existing businesses. BRE incorporates structured information gathering that serves as a mechanism to build dialogue with local business with the aim to identify issues, goals and potential opportunities. The data collected is crucial to the sustainability and viability of rural communities. BRE is used to determine the needs and opportunities for business growth in a community through a systematic approach.

After receiving funding for the project, the study was named the Jasper Business Visitation Study. The Jasper Business Visitation Study determines the needs and opportunities for business growth in the community through a systematic approach. It creates research and information that partners with community engagement to address needs and identify opportunities.

This Business Visitation program incorporated the principles of Business Retention and Expansion. Through consultation with the Municipality of Jasper, the Jasper Park Chamber of Commerce, Parks Canada and the Jasper Partnership Initiative, a project proposal and work plan were developed. It was determined that a study based on six key economic and community factors should be developed to gain feedback from local businesses in Jasper.

Those six factors are:

Part A: Type of Business: owner specific information, including age, business land use, corporate headquarters and how the business was acquired

Part B: Questions on Labour: employee breakdowns, Temporary Foreign Workers, training opportunities, wages and benefits

Part C: Business Conditions and Local Trends: increases / decreases in profitability over the past two years, identifying place of origin for customers in 2014, as well as annual adjustment of pricing

Part D: Future Business: an in-depth look at any potential challenges to renovation and expansion, predictions on business for the coming two years

Part E: Informational Needs: how to best communicate with owners / operators, identified barriers to growth, potential suppliers to attract to the region

Part F: Community Factors: satisfaction was rated on a number of community factors and services

The Jasper Business Visitation Study used a direct person to person interview system to collect information relevant to economic development within the national park. The study is meant to be a resource for the community that can be used to move forward in formation of business regulations, and economic development initiatives within the community of Jasper National Park.

The Jasper Business Visitation Study was distributed across the business community of Jasper by

members of the CFWY team. The opportunity to connect with local business is an important step in establishing a link between economic development partners and the business community.

This study is an asset to the community, brought forth by a third party regional non-profit organization. It provided business owners with the confidence to speak freely that may have otherwise been difficult when dealing directly with a municipality employee or a local resident. The study offered the utmost in confidentiality and feedback was not accredited back to the source. Findings are shared by sector to ensure confidentiality within the business community.

Taking part in the interview session was optional, and generally lasted between 15-40 minutes. Interviews took place primarily in person, at the participant's place of business. It was felt that this method of one-on-one information gathering produced the most accurate and informative results. The response rate was high with 138 businesses participating in the study, with the majority of business welcoming the chance to speak freely. Several businesses sought out our study to specifically provide feedback. Interview sessions were offered by appointment, drop in, telephone or email. All businesses interviewed have physical day-to-day operations in Jasper National Park. CFWY staff undertook extensive pre-planning measures so that interviews were as efficient as possible to minimize the impact on the busy schedules of participants.

The primary data for this study was collected by CFWY staff during the summer months of 2014 and these findings are meant to be used as a snap shot in time. Contained in this study are a list of recommendations based on the statistical data collected in Jasper during the months of June to September 2014. This study should be used as an informational tool, and a starting point to encourage dialogue between stakeholders and business owners. The document was designed to be used as a community document that any stakeholder community partner could access. The full study can be accessed on the CFWY web page, www.westyellowhead.albertacf.com or in print at the Hinton CFWY office.

1.0 Introduction

1.1 Background

The Town of Jasper is located centrally in Jasper National Park, nestled in the Canadian Rockies near the Athabasca River Valley along Highway 16. It is 378 kilometres west of Edmonton and 340 kilometres North of Banff.

The municipality of Jasper was established as a specialized municipality on July 20, 2001. Governance is shared between the municipality and Parks Canada. Jasper has a population of 4,051 , and the median family income is \$53,485.

According to the most recent government statistics available (Census 2010) 38% of Jasper residents work in sales and service occupations, 16 % work in management occupations, 14% work in trades-including transport and equipment operators and related occupations, 12% work in finance and administrative occupations and 20% work in other non-categorized positions.

Key employment sectors in the Jasper National Park include environmental services, transport services, tourism, and the hospitality tourism industry.

Major employers in Jasper include:

- Parks Canada – currently Parks Canada employs a substantial number of year round and seasonal employees.
- Municipality of Jasper - currently employs 75 full-time staff, this number fluctuates throughout the year depending on projects and normal staffing requirements.
- CN Rail – employs approximately 300 through the Jasper rail site.
- Fairmont Jasper Park Lodge - in the winter and shoulder seasons they employ anywhere from 300-400 people and in the peak summer season they employ up to 750 people.
- Marmot Basin- in peak season when the ski hill is operational, Marmot Basin employs 300 people.
- Hospitality Tourism Industry- Larger hotel chains such as Mountain Park Lodges currently

employ 450 people, the Sawridge currently employs 125 people, and Decore Hotels employ 102. Jasper has many restaurants that average between 3-15 employees depending on the individual establishment.

In consultation with the Town of Jasper and the Jasper Park Chamber of Commerce, Community Futures West Yellowhead developed a Business Retention and Expansion (BRE) proposal. It is intended for CFWY to conduct BRE studies in each of the five communities in the region. In 2014, a business Visitation Program was initiated in Grande Cache and Jasper. It was established that a locally tailored program would be the best fit for the Jasper area.

Direct input for the study was collected from various community partners and stakeholders. Feedback and vetting for the BRE project came from the Municipality of Jasper, Parks Canada, the Jasper Partnership Initiative and the Jasper Park Chamber of Commerce.

1.2 Purpose of the Study

The main goals of this Business Visitation Program are:

- Identify major regional and community themes that are impacting rural businesses
- Contribute to the local economy by developing data that is current and relevant to community economic development goals
- Facilitate the gathering of data that can lead to effective strategic planning for community economic development and new businesses
- Understand and address urgent business issues through action
- Act as a business attraction strategy
- Increase communications between business support organizations and the business community
- Build recommendations for future implementation in Jasper, Alberta

The Business Visitation Study determines the needs and opportunities for business growth in the community through a systematic approach. It creates research and information that partners with community engagement to address community needs and opportunities.

Business retention and expansion information gathering is a community economic development tool used to encourage growth and stability for existing businesses. Our Business Visitation Study incorporates structured informational gathering that serve as a mechanism to build dialogue with local business with the aim to identify issues, goals and potential opportunities. The data collected is crucial to the sustainability and viability of rural communities.

Six sections were developed based on community discussions and outlined priorities to gain feedback from local businesses in Jasper. These questions focused on topics including: business statistics, questions on labour and resources, local conditions and trends, future business plans, informational needs, and community satisfaction factors.

In total 45 questions were developed for the study. Questions having multiple choice options were modeled after information from the Economic Developers Association of Alberta and encouraged the business owner to offer feedback and solutions to their identified challenges.

The information collected is intended to build dialogue with local business with the aim to identify issues, goals and potential opportunities. The Jasper Business Visitation Study findings are available to the community and should be treated as a community document. The study findings appear on the Community Futures West Yellowhead web page, www.westyellowhead.albertacf.com , as well as the Municipality of Jasper web page, www.jasper-alberta.com.

1.3 Community Futures West Yellowhead

Community Futures West Yellowhead is an independently operated, non-profit organization funded by the federal government's department of Western Economic Diversification. Currently, there are 268 Community Futures offices in Canada, including 27 offices in Alberta that support rural economic development by providing new or existing businesses the tools and resources they need to succeed. Established in 1985, Community Futures has helped over 114,000 entrepreneurs and invested over \$3.9 billion into the rural economy of Canada.

Community Futures is the only organization throughout rural Alberta with a mandate for business and community economic development. In 2013, 27 offices in Alberta made over 500 loans totalling \$26 million dollars, leveraging a further \$25 million that helped create or maintain nearly 1,600 jobs. Community Futures has a proven track record that shows that business clients grow faster and last longer than businesses started with other traditional source financing.

Community Futures West Yellowhead works in the communities of Jasper, Hinton, Edson, Grande Cache and Yellowhead County. Governed by a board of 10 directors with two representatives from each municipality, the main office is located in Hinton, Alberta. For more information regarding Community Futures West Yellowhead please visit www.westyellowhead.albertacf.com.

1.4 Methodology:

The BVS initiative was distributed across the business community of Jasper. The opportunity to connect with local business is an important step in establishing a link between economic development partners and the business community.

For Jasper this will be the first time a comprehensive business visitation initiative has been undertaken. According to the active business licence list provided by the Municipality of Jasper, there are 677 independent business licences issued for the community. It appears that most licences are slated for Accommodation, Contracting or Construction Services, the Service industry including Retail, and Restaurant services. While researching further into the dynamics of the Jasper business community, it appears this is an inflated number, as the Chamber of Commerce members list sits at 178 members. However, included in the active business licences provided by the municipality were approximately 200 home-based accommodation businesses. For our study we took a 10% sample of those businesses chosen at random.

The business sample that our study looked at is a combination of both the active business licence list, and the Chamber of Commerce members lists, reviewed by key members in the community to ensure that we would approach an accurate cross sample of each of the major industries.

The Municipality of Jasper has outlined 'Economic Stability' as being one of the 5 principles that they are working towards. We view the 2014 Business Visitation Study as an asset to the community, brought forth by a community non-profit organization. It provided business owners with the confidence to speak freely, that they may not feel when dealing directly with a Municipal or Parks employee or local resident.

Through information gathering sessions with key Jasper representatives we created a well rounded set of questions to interview the business community. Resulting in an accurate assessment of their current and projected needs. The study produces an informative look into doing business in the community of Jasper, through the eyes of local business people.

The study focused on these six key factors:

- Part A featured questions on the 'Type of Business' – owner specific information including age, business land use, corporate headquarters and how the business was acquired.
- Part B focused on 'Questions on Labour'- employee breakdowns, Temporary Foreign Workers, training opportunities, wages and benefits.

- Part C looked at 'Business Conditions and Local Trends'- increases / decreases in profitability over the last two years, percentage wise where most of the 2014 customers have come from as well as annual adjustments of pricing.
- Part D looked ahead to the future with 'Future Business' plans- an in-depth look at any potential challenges to renovation and expansion, predictions on business for the coming two years.
- Part E focused on 'Informational Needs'-how to best communicate with owners / operators, identified barriers to growth, potential suppliers to attract to the region.
- Part F focused on 'Community Factors'- Satisfaction was rated on a number of community factors and services

Full survey documents are provided in Appendix A

Taking part in the interview session was optional, but most businesses saw the value in having their thoughts and concerns heard and presented. This study offers the utmost in confidentiality and comments and feedback have not been accredited back to their source, but rather their employment sector. We feel that this allowed the business community to be honest and upfront about challenges and gaps in their field.

When planning out the best timeline for the study, we understood that June through August would be a busy season for businesses in Jasper. Our goal was to minimize the impact on participants and keep interview times as brief as possible. Most interview sessions took between 15 and 40 minutes to complete and business had the option to have multiple sit down interviews if that worked better for them. Almost all of the interview sessions happened in a face-to-face interview style at the participant's place of business, we found that this method provided the most accurate results and feedback.

Through conversations and general feedback from members of the business community, we created a timeline to best suit different local industries. We started the Business Visitation Study process with independent contractors (including plumbing, electrical, construction etc) and after summer staffing was in place, moved on to the Hospitality and Food Service sectors. Jasper normally experiences a lower number of visitors during the Calgary Stampede week (in 2014 that was July 5-12), so we reached a lot of the tour companies during that time.

The preliminary findings of the Jasper Visitation Study were presented during Small Business Week, in the October Town Council meeting. The full study is available on the CFWY website as well as the

Town of Jasper web site. For more information please contact Community Futures West Yellowhead.

1.5 Study Timeline

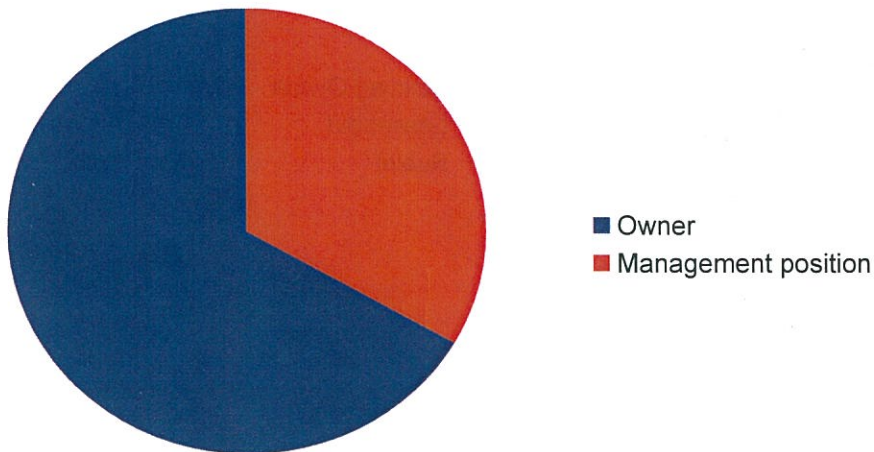
Elements:	Action:	Resources:	Time Frame:
<ul style="list-style-type: none"> -Meet with key partners -Determine a sample size 	<ul style="list-style-type: none"> -Engage stakeholders -Identify opportunities through discussion and presentation feedback 	<ul style="list-style-type: none"> -The Chamber of Commerce, town councillors, BOD of CFWY, Communications manager and CAO of Jasper 	<ul style="list-style-type: none"> April 2014 - May 2014
<ul style="list-style-type: none"> - Develop marketing for the Jasper Business Visitation Study - Start discussions with key stakeholders 	<ul style="list-style-type: none"> -Train staff on Executive Pulse -Develop information package for distribution -Distribute to local business community 	<ul style="list-style-type: none"> -CFWY programming resources -Economic Development Association of Alberta -Town of Jasper Active Business Licence list 	<ul style="list-style-type: none"> May 2014 – June 2014
<ul style="list-style-type: none"> -Develop informational interview gathering tool, BRE survey -45 questions, open ended etc. -Interview participating businesses 	<ul style="list-style-type: none"> - Acquire points of interest from partnerships -Compile industry specific questions -Format Jasper's specific information 	<ul style="list-style-type: none"> -Economic Development Association of Alberta - Executive Pulse 	<ul style="list-style-type: none"> May 2014 – June 2014
<ul style="list-style-type: none"> -Record results 	<ul style="list-style-type: none"> -Information gathering 	<ul style="list-style-type: none"> -CFWY 	<ul style="list-style-type: none"> June 2014 - September 2014
<ul style="list-style-type: none"> -Analyze findings of surveys -Develop sideshow presentation and preliminary findings 	<ul style="list-style-type: none"> -Provide accurate data input into various required sources to fulfil contract and reporting requirements 	<ul style="list-style-type: none"> - Executive Pulse software -CTC Government Tourism Stats -Economic Development Association of Alberta 	<ul style="list-style-type: none"> September 2014-October 2014
<ul style="list-style-type: none"> - Present findings to Jasper Town Council 	<ul style="list-style-type: none"> -Create executive summary and information package based on study preliminary findings -Create slideshow information and tools to aid in various presentations 	<ul style="list-style-type: none"> -Town of Jasper Council and administration -CFWY Board of directors 	<ul style="list-style-type: none"> October 2014
<ul style="list-style-type: none"> -Construct full study based on findings 	<ul style="list-style-type: none"> -Construct final study document and distribute to the Jasper community 	<ul style="list-style-type: none"> -CFWY board of directors -General Manager CFWY 	<ul style="list-style-type: none"> November 2014 - December 2014

2.0 Key Findings

2.1 Type of Business- Part A

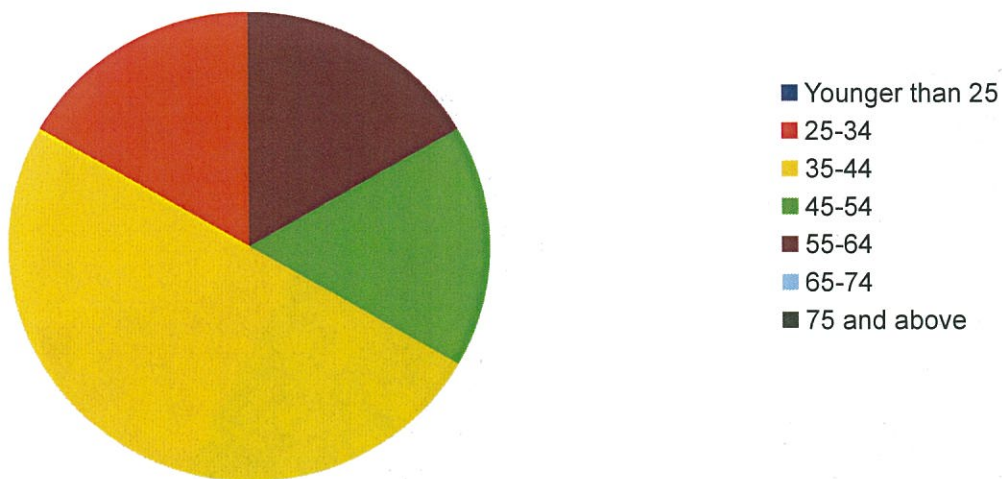
For our Business Visitation Study 66% of the responses reported in the study, came directly from the owner of the business. 33% of our responses were from positions of management, such as General Managers, day time managers, and Operations Managers (Figure #1). Some of the Managers referred specific questions to different department heads, such as Human Resources, for questions they were unsure about.

Figure #1- Survey Feedback Responses n=138



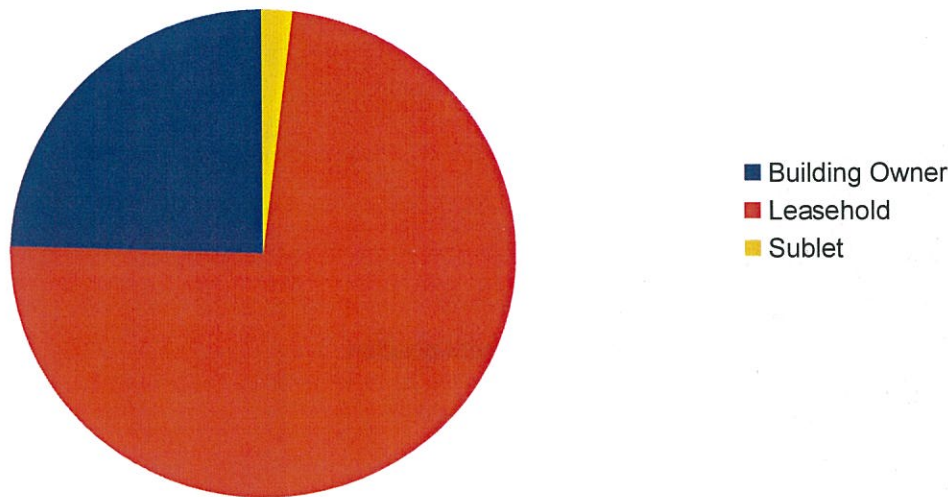
Business owners in Jasper are relatively young, with 50 % being between the ages of 35-44 years old. A substantial percent (16%) being between the ages of 25-34, making them youth entrepreneurs by the Alberta standard (Figure #2).

Figure #2 – Age Business Owner



74 % of the businesses stated that they operated in a leasehold situation, with 24% owning the building that they operate out of, and only 2% are currently subletting (Figure #3). The majority of leasehold operations were retail, food establishments and spa services, while the building owners were preliminary older, more established business or larger hotels. All home accommodations are required to own (a 49-year lease on the individual property) their home in order to operate as a licensed home accommodation.

Figure #3 – What is your current land situation?



66 % of the Jasper businesses have local ownership (Figure #4), with the larger employers having off site owners generally located out of the community. Most owners stated that they either built or purchased the businesses (91%), while very few acquired it from succession planning (Figure #5).

Figure #4 Ownership

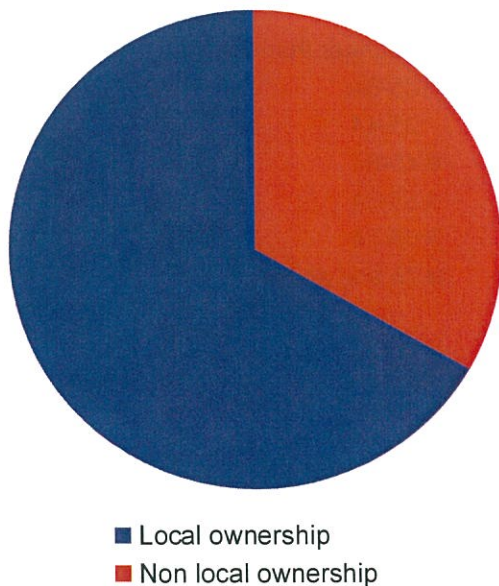
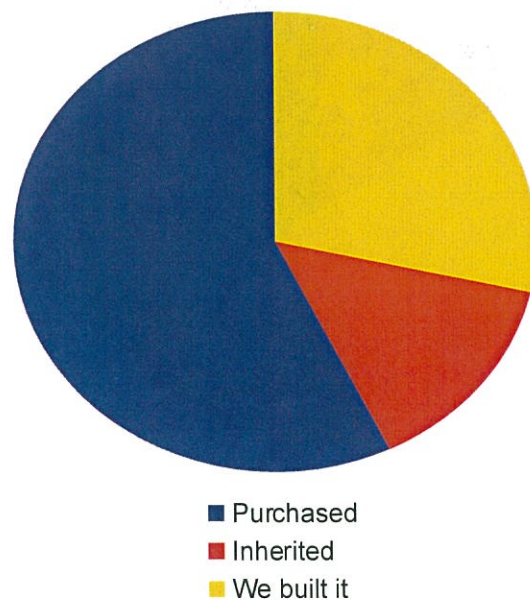


Figure #5 How did you acquire your business?

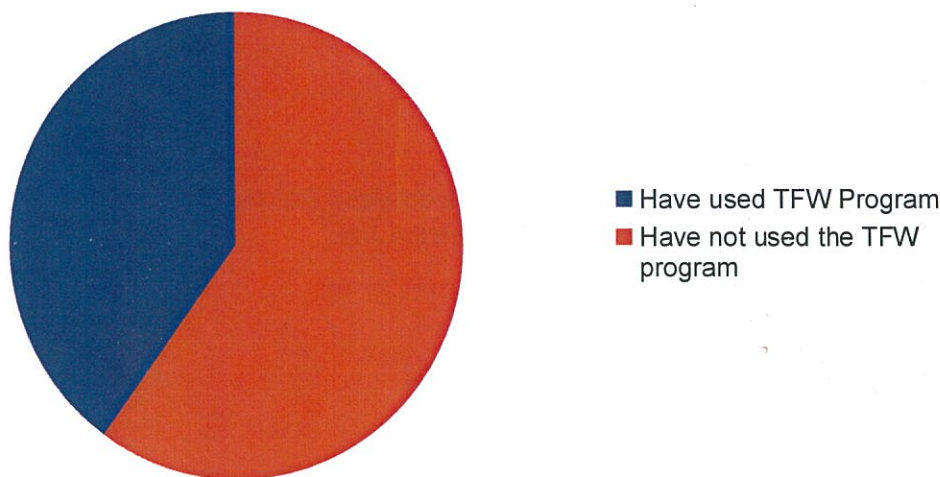


2.2 Questions on Labour- Part B

This section focused on questions regarding labour within the organization and Jasper overall.

In many small businesses, especially those with onsite ownership, family often assist with the business. This is generally beneficial in rural communities to assist with succession planning. In Jasper 71 % of businesses have paid family employees on staff. Some businesses cited that they had brought family back into the business due to changes in the Temporary Foreign Workers program that was altered by the federal government in 2014. 40% of Jasper businesses currently use or have used the TFW program to aid in staffing issues (Figure #6). Some of the businesses even stated that they are unsure how they will be able to operate without the program moving forward. The TFW program was used in many of the industries in Jasper including accommodations for house keeping and administrative staff, as well as restaurants for various kitchen assistance positions.

Figure #6 – Temporary Foreign Workers



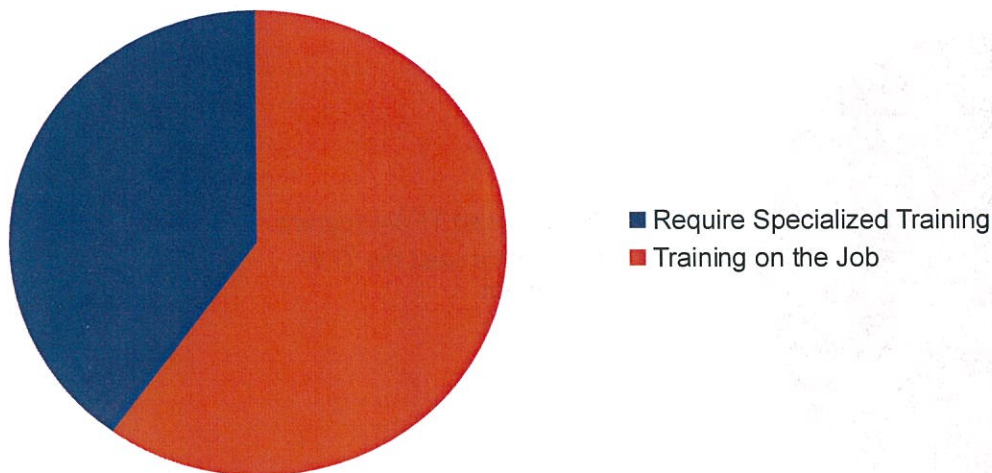
Business owners have not lost sight of their goal and have gotten creative with their hiring tactics. 42 % of businesses have post-secondary students on staff. 7% even have high school students working for them. In Alberta the legal age to work with parental consent is 12 years old and most of the high school students working in Jasper are in 'behind the scenes' positions such as dishwashers, table busers, housekeeping, etc. Employers also stated that the younger employees have restrictions on hours they can work and almost all employers said that they encouraged their younger workers to stay in school and continue on to post-secondary studies.

Jasper's busy time of year is the summer, particularly during the months of July and August. Most summer staff have been hired by June to be fully trained for the peak season. The winter months produce slightly lower tourism numbers as well, due to the skiing and winter adventures. The shoulder seasons have gained stronger numbers of parks visits in the past two years, possibly due to new events such as the Dark Sky Festival, that happens annually in October.

Overall, 50% of Jasper businesses have experienced trouble recruiting paid employees year round, with only 25 % struggling to recruit part time employees year round. This is likely due to the fact that many Jasperites hold multiple part-time positions in the community, often to offset their wages.

The average wage of non-managerial positions in Jasper is \$12.50 per hour and does not include any additional health, vacation or retirement benefits above the legal requirements in Canada. While wages may be low compared to Alberta's average on similar industry occupations, (According to Stats Canada the Alberta average is \$18.68 based on comparable industries) local employers have come up with some interesting staff incentives. These incentives are often used to improve quality of life and come in the form of ski passes, credit towards bicycles, home accommodations, and tickets to local events and performances.

Figure #7 Workforce Training



60% of businesses stated that they will train workers on the job and do not require specialized training (Figure #7). Some examples of requested required specialized training consists of Guide Certification, Standard First Aid, Customer Service training, specialized computer or graphic design certification, and accounting certificates.

Overall, businesses felt that Jasper job seekers were average for a remote community of its size, with businesses stating that their attitude and productively was fair overall. Customer service was also rated fair at best, with comments suggesting potential customer service seminars or training to be available for local job seekers. Some larger employers stated that they provide their own customer service training in house and felt that after job seekers had completed the training they were confident that the level of service had greatly improved. Businesses stated that job seekers could use improvement in understanding local tourism opportunities and needs of potential customers before working in the Jasper area, with several citing the success of programming coming out of the Jasper Adult Learning Centre.

2.3 Business Conditions and Local Trends – Part C

Most of the businesses interviewed in the study are open year round. The shoulder seasons and the winter in Jasper are considerably slower months in the community. Many businesses reduce staff hours to reflect the slower tourism traffic and rely more heavily on the regional pull of the community.

Front line business in retail and food services reported that the majority of summer 2014 tourists came from Alberta, a strong trend reflecting in provincial tourism. According to Travel Alberta, in 2012, 75% of visitors to the Canadian Rockies were residents of Alberta, this number seems to be reinforced in 2014 by feedback from local Jasper businesses.

Most business owners cited that they saw increases in customers from the United States, as well as Europe and Asia in the summer months of 2014. According to the CTC Tourism review, produced by the Government of Canada, core travel markets were up 1.9 % over June 2013, an increase of 3.8% in July compared to 2013 numbers and an increase of 3.5% in August 2014 compared with 2013 numbers, putting Jasper's increases in line with with Canadian tourism.

The majority of consumers in the Jasper area were visitors on family vacations. There was a reported increase in the number of campers in the summer of 2014 coming into the town site for goods and services.

Figure #8 Changes from 2012-2014

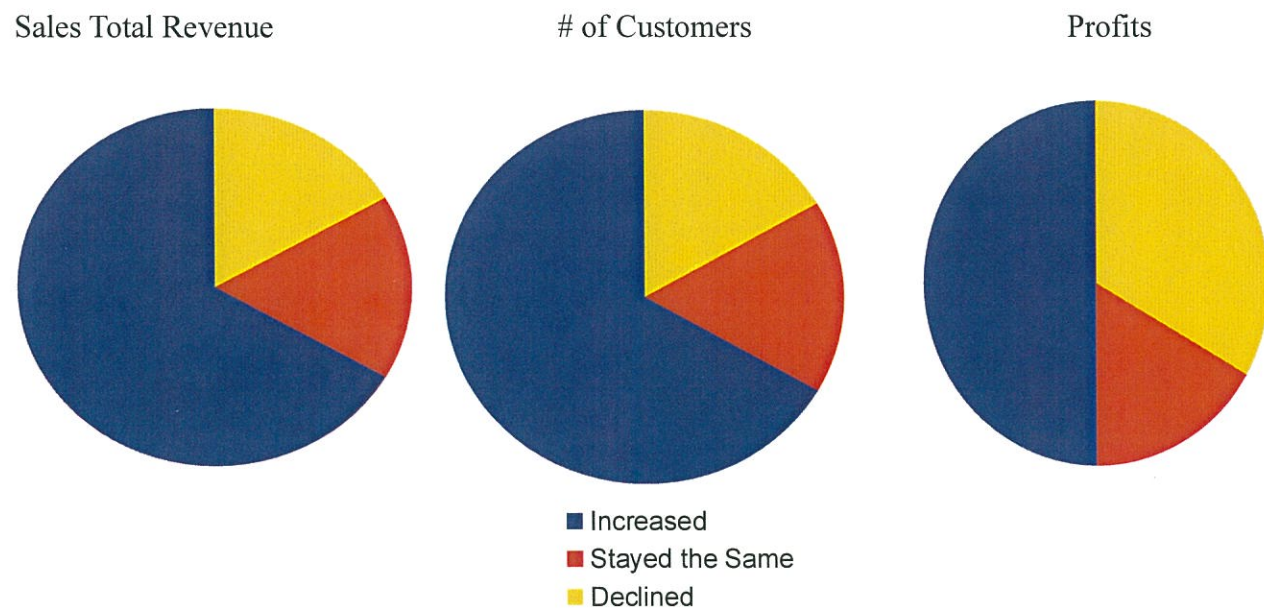


Figure #8 shows that over the past two years, strong growth has been reported from businesses, with 66% stating an increase in their sales total revenue, and 67% showing a distinctive growth in number of customers. Most of this growth was accredited back to increased numbers of travellers in the Park. Several business owners mentioned that they felt this was partially due to the global economy bouncing back to pre 2009 travel numbers, as well as an increase in the Tourism Jasper commitment to the community. 50% of businesses saw an increase in profits since 2012 and 82% have been able to maintain staffing levels or increase the number of full and part time positions within their business during that time frame.

Factors of Annual Adjustment of Prices

Many factors go into the annual adjustment of prices, CFWY asked business owners how local factors weighed in to the decision making process. Energy costs seem to be the highest affecting factor with 66 % stating that the cost of energy greatly affected their pricing structure. Also labour costs greatly affected the pricing structure for 33% of Jasper businesses. Only 16% stated that property taxes significantly affected their annual adjustment of prices.

2.4 Future Business – Part D

Section D of our study focused on future business plans for Jasper businesses.

Projected Changes:

Figure #9 Projected Changes from 2014-2016

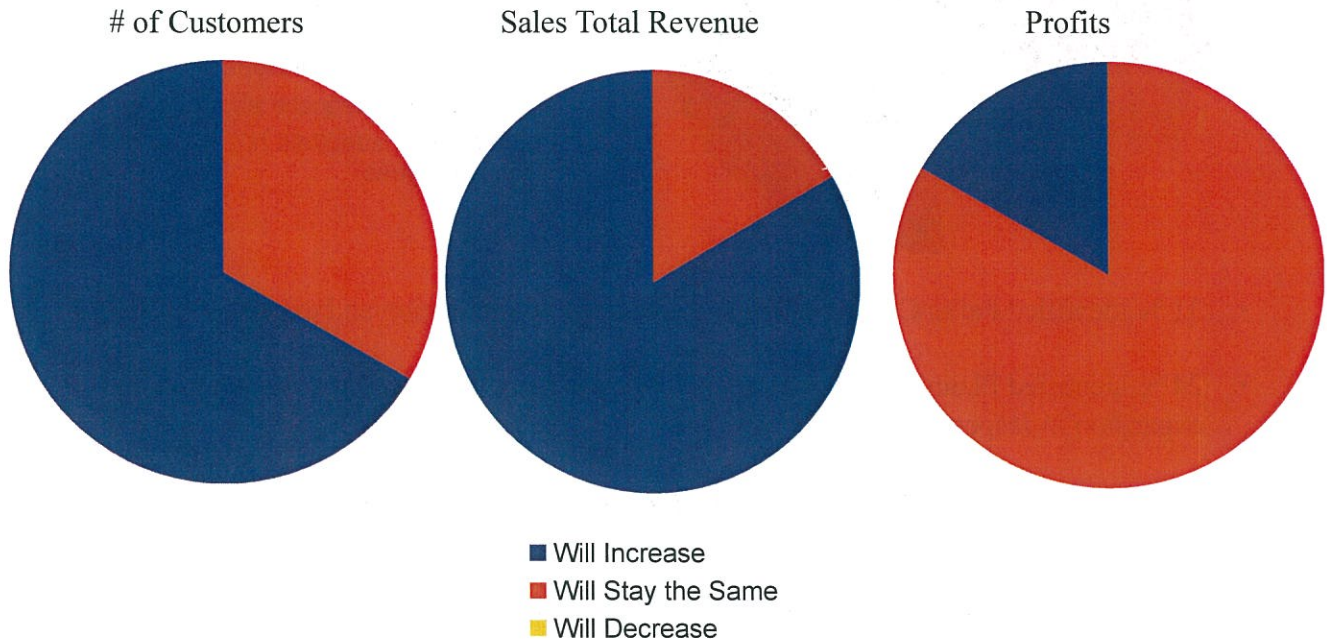


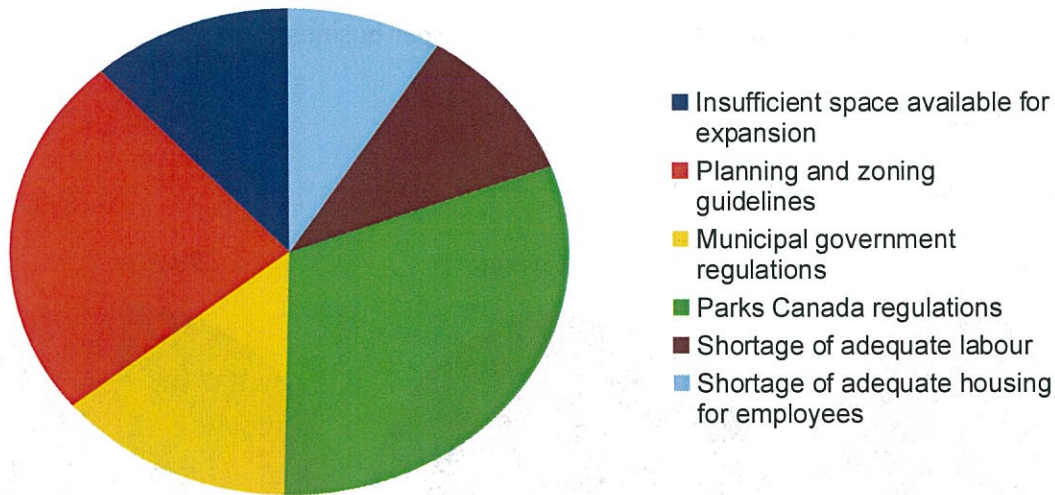
Figure #9 shows that over the next two years Jasper businesses expect marginal increases in the number of customers, with increases in sales total revenue. However most Jasper businesses feel that the profit margin will remain the same as 2014, they mostly accredited this to the rising costs of doing business. Most business owners stated that they hope to reinvest back into their business and continue to grow.

Renovation and Expansion:

66% of businesses in the Jasper National Park are currently considering renovating or expanding their building or facilitates with 50 % of those businesses looking to create new jobs if the planned renovation or expansion should happen.

However, only a portion of those businesses stated that they would act on these renovations and expansions. Many cited constraints to renovation and expansion preventing them from moving forward. Figure #10 Shows the identified constraints to renovation and expansion as identified by Jasper businesses.

Figure #10 Constraints to renovation and expansion as identified by Jasper businesses



- 31 % identified Parks Canada as being a constraint to renovation and expansion in Jasper
- 24 % identified Planning and zoning guidelines as being a constraint to renovation and expansion in Jasper
- 13 % identified municipal government regulations as being a constraint to renovation and expansion in Jasper
- 11 % identified insufficient space available for expansion as being a constraint to renovation and expansion in Jasper
- 10 % identified shortage of adequate labour as being a constraint to renovation and expansion in Jasper.
- 9 % identified shortage of adequate housing for employees as being a constraint to renovation and expansion in Jasper.

Business Closures

Five businesses interviewed expressed that they are considering closing in the next twelve months. Those businesses expressed that rigid code enforcement, including ordinances and building codes (2 businesses), insufficient labour supply (1 business), lack of land for expansion (1 business), and retiring (1 business) being the main reasons of the closure.

2.5 Informational Needs- Part E

In Part E of the study we looked at informational needs. The first question asked businesses if they required additional information on a number of identified topics including:

- Customer Service Training
- Financial Management
- Computer Related Training
- Internet / E Business / Business Marketing / Advertising
- Business Plan Development
- Business Development Resources
- Entrepreneurs with Disabilities
- Job Sharing / Alternative Workplace Solutions

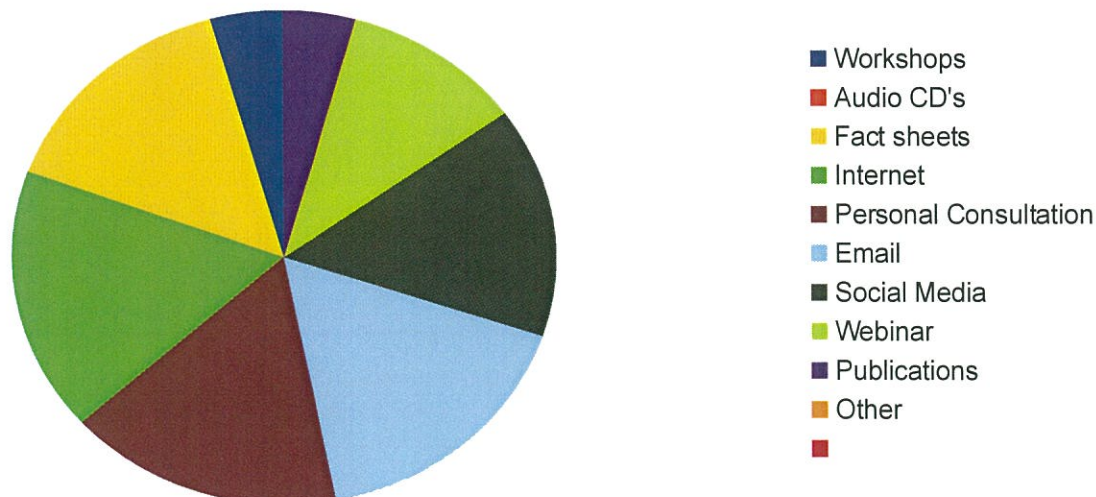
When businesses identified an interest in any of these topics, Community Futures West Yellowhead made appropriate referrals to regional resources that provide these services. Several business owners received tailored information packages including contacts in the Jasper area for specific services with brief summaries of programs that may be of use.

Preferred Communication Strategies

Also in this section we looked at the preferred method for Jasper business owners to receive important information. The options for this item were generated based on current communication options recognized by the government of Alberta available within the West Yellowhead Region.

From the graph below you will see that the majority of respondents would like important communication to come through internet, including email and social media. Clear fact sheets were identified as an important communication tool. Personal consultation ranked very high on small business owners' priority lists, while larger business owners preferred to have email correspondence as their main contact.

Figure #11: Preferred Communication Methods



- 17% stated that they would like to be communicated to through the Internet correspondence.
- While 16% stated that they would like to be communicated with through Personal Consultation, many made comments about the feasibility of personal consultation.
- 16% stated that they would like to be communicated with through regular Email correspondence.
- 15% stated that the use of Fact Sheets would be their preferred method of communication.
- An additional 15% stated that they would like to be communicated to through the use of Social Media.
- 10% stated that they would like to be communicated to through the use of Webinars.
- 4% stated that they would like to be communicated with through the use of Workshops and group presentations.
- 4 % stated that they would like to see standardised Publications used to communicate with them, several businesses stated that the publications and fact sheets could go hand in hand.
- There was no interest in using Audio CD's at this time, or any other methods of communication than those listed above.

2.6 Community Satisfaction Factors- Part F

Part F of our study focused on how the business owners felt about community services. Jasper businesses were asked to rate the services on a scale of 1-5, with 1 being excellent. The following multi part questions were developed through consultation of CFWY's community partners and the Economic Developers Association of Alberta.

Community Services:

Service:	Response:
Access to Airport Facilities	83% felt these were poor
Access to highway roadway	50% felt they were excellent
Adequate community signage	66% felt that it was fair to poor
Access to suppliers	50% felt it was average
Ability of rail transport services	66% felt that is was average to good
Availability of warehousing space	33% felt that it was average for a community of its size
Disposal of Waste materials	33% felt that it was average for a community of its size
Recycling	33% felt that it was average for a community of its size
Inspections (eg. Licensing)	67 % felt that it was fair to poor
Development approval process	83% felt that it was fair to poor
Internet access	67% felt that it was good to excellent
Telephone access	65% felt that it was average or better
Availability of appropriately zoned land	83% felt that it was poor
Water and sewage supply	83% felt that it was average or better for a community of this size

Comments:

Jasper businesses were then asked to provide comments and any potential solutions for challenges of the services and infrastructure described above. The number inside the bracket indicates the number of similar responses, if no number appears then it is the only comment of that nature. Responses have been edited only to simplify the message and group with similar comments.

Adequate Community Signage: (7 comments overall)

- Signage bylaws need to be consolidated between Parks and the Municipality (4)
- If you know someone you can put signage wherever you want (2)
- I have applied to have my business signage on my building, but have been denied by Parks, while other businesses haven't gone through the proper channels and their signage remains

Access to Highway Roadway: (3 comments overall)

- Increase sand and ploughing on HWY 93 and 16
- Biking laws need to be reinforced in Jasper and ticketed when necessary (2)

Availability of warehousing: (4 comments overall)

- There is no warehousing space available in Jasper (4)

Recycling: (5 comments overall)

- Local recycling is not cost efficient
- We need curbside recycling (2)
- Waste disposal and recycling for businesses are a challenge in Jasper (2)

Inspections and Licensing: (11 comments overall)

- Procedures for licensing and permits need to be streamlined (5)
- Approvals and procedures for permitting need to be revisited (3)
- Timing of inspections is often inconsistent
- If the Municipality had control over Jasper development we would be in a better state (2)

Development Approval Process: (19 comments overall)

- There are too many departments to navigate through to speak to the right personnel (6)
- Rules and regulations seem to be forever in flux, changing drastically annually (3)
- Approvals are based on who you know, not a distinctive process (7)
- Having two funders is a hurdle for employers, 2 sets of funding means 2 sets of different protocols, which is a challenge for small business owners (3)

Availability of Appropriately Zoned Land: (5 comments overall)

- There is no available land (4)
- Parking is an issue for my business

Community Factors:

In terms of doing business, how do you rate this community with respect to these factors:

Community Factors:	Response:
Community Beautification Initiatives	50 % felt that they were good
Infrastructure Services	50% felt that they were good
Labour Pool	50% felt that they were poor
Transportation	50% felt that they were good
Community Storage	33% felt that this was good
Development Approval	83.3% felt that this was poor
Access to Raw Materials	33.4% felt this was average to good
Access to Fuel	66% felt that this was poor
Permit Fees	66.7% felt that they were average
Land	50% felt that this was poor
Existing Jasper Buildings	50% felt they were average for a community of its size
Leasing Space	66.7% felt that it was poor
Construction	66% felt that it was better than average
Telecommunications	60 % felt that it was average to good
Taxes	50% felt that they were average for a community this size
Staff Housing	100% felt that it was poor in the community

Comments:

Jasper businesses were then asked to provide comments and any potential solutions for the community factors described above. The number inside the bracket indicates if there are similar responses. Responses have been edited only to simplify the message and group with similar comments.

Community Beautification Initiatives: (8 comments)

- Increase community art (2)
- Paint a mural on the fencing on the old gas station site
- Decorate vacant store fronts
- It is hard to see through the mesh wire frames around the trees on the main drag (3)
- The community garden is a mess, I can't believe that they allowed it on the main drag

Labour: (4 comments overall)

- Attract more trades people to the area (3)
- Encourage the registered apprentice program for youth

Development Approval: (9 comments overall)

- The municipality should take the reins from Parks. Parks systems are too complicated (4)
- Improve types of businesses that are allowed, such as food trucks and more home-based businesses, seriously consider the number of allowed business types (3)
- If the municipality had more control of development it would be more responsive to the needs of the residents, Parks Canada's mandate is not Jasper specific. Jasper is not a high priority. (2)

Fuel: (7 comments overall)

- Look at putting in a fuel station in the industrial park (2)
- Current gas station placement causes major congestion on the main drive (4)
- Our company has to take turns with our competition to fill our tanks

Leasing Space: (9 comments overall)

- Cost of doing business in Jasper is too expensive (3)
- Businesses have to charge more for services and products to offset the store front costs
- Store front rent is inflated (4)
- Hard to be a new business in town, no one will give you a break on rent

Staff Housing: (36 comments overall)

- Make staff housing a priority (11)
- Increased staff housing means I can afford the labour
- Parks and the municipality need to stop talking about solutions and start making action plans (2)
- The community, along with the governing parties and the business community need to get together to solve the housing problem (2)
- Current housing meetings have a lot of talk but not a lot of action. Suggestions are not being considered.
- As a community we need to look at alternative solutions (10)
- Parks Canada should release more land (5)
- Increase staff housing, use some of the existing green space in the town site
- Affordable housing needs to be a priority (3)
- Put affordable housing on the other side of the tracks or on the hill

Community Services:

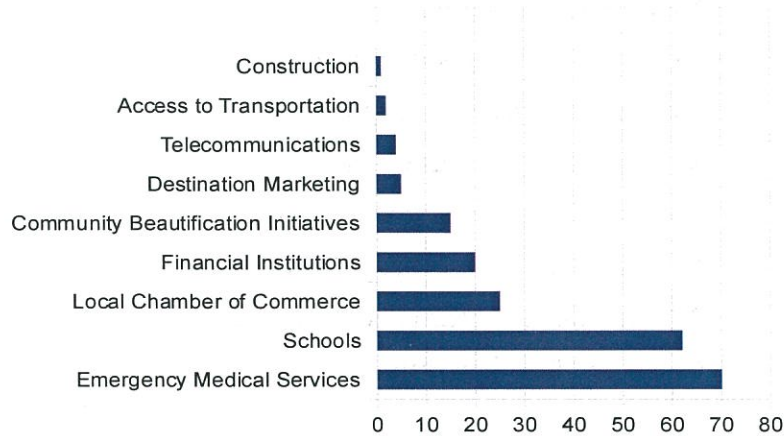
Based on the following community services, please grade this location as a place for your company to do business:

Community Services:	Response:
Street maintenance / drainage	83.4 % felt this was good
Water and sewer	83.4% felt this was good
Emergency medical services	67% felt this was good or better
Fire Protection	83% felt that this was excellent
Police Protection	83 % felt that this was excellent
Health care facilities	67% felt that this was good or better
Electricity cost and reliability	66% felt that this was better than average
Natural gas cost and reliability	49% felt that this was better than average
Telecommunications	66.7% felt that they were good
Solid waste disposal	66% felt that they were good or better
Zoning and permitting	71% felt that it was poor
Code enforcement	62% felt that it was poor
Available building space	59% felt that this was poor
Available land	67% felt that this was poor
Public schools	46% felt that they were excellent
Francophone schools	46% felt that they were good
Financial institutions (choice and access)	66% felt that they were good or better than average
Child care	50% felt that it was average
Post secondary education	66% felt that it was poor
Local Chamber of Commerce	71% felt that it was good
Municipal airport	83.3% felt that it was poor
Destination marketing	66% felt that it was better than average

2.7 Community Strengths:

Jasper businesses identified their top three greatest community strengths (based on the previous questions):

Figure #12: Identified Community strengths



Top Three Identified Community Strengths:

1. Emergency Medical Services, including Fire and Police Protection (70)
2. Schools, including both public and francophone (62)
3. The local Chamber of Commerce (25)

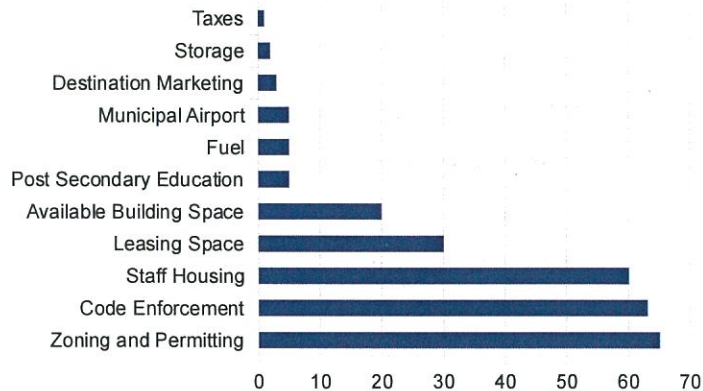
The following are listed as other identified top three community strengths, the number in brackets indicates how many times it appeared in the top three selection.

- Financial institutions (20)
- Community beautification initiatives (15)
- Destination marketing (5)
- Telecommunication services (4)
- Access to transportation (2)
- Construction (1)

2.8 Community Weaknesses:

Jasper businesses identified their top three greatest weaknesses (based on the previous questions):

Figure #13: Identified Community Weaknesses



Top three identified community weaknesses:

1. Zoning and permitting (65)
2. Code enforcement (63)
3. Staff housing (60)

The following are listed as other identified top-three community weaknesses, the number in brackets indicates how many times it appeared in the top three selection.

- Leasing space (30)
- Available building space (20)
- Post secondary education (5)
- Fuel (5)
- Municipal airport (5)
- Destination marketing (3)
- Storage (2)
- Taxes (1)

Note: Destination Marketing appears on both the greatest strengths and weaknesses, this is not an error, simply a representation of the data from the survey.

Interest Factors:

In terms of doing business, how do you rate the community with respect to these factors:

Interest Factors:	Response:
Built Environment	49% felt that it was average or better
Public Space Aesthetics	61% felt that they were good or better
Parks (inside the town site)	32% felt that they were good or better
Train Network	49% felt that they were above average
Sports Facilities	33% felt that they were good
Public Art	65% felt that it was only average or below
Street Use	34% felt that it was poor or very poor
Wayfinding	50% felt that it was very poor
Parking	33% felt that it was poor to very poor
Special Events	49% felt that they were average to good
Cultural Identity	33 % felt that it was average, 16% felt that it was good
Customer Service	33% felt that it was average compared to a community of this size
Community Spirit program	33% felt that it was good

Comments:

Jasper businesses were then asked to provide comments and any potential solutions for the community factors described above. The number inside the bracket indicates if there are similar responses. Responses have been edited only to simplify the message and group with similar comments.

Wayfinding: (10 comments overall)

- The community lacks a professional approach for signage
- Jasper should have town maps at strategic places around the community to identify trail locations and other key sites (3)
- Signage should be consistent between parks and the municipality (4)
- Around the lodge signage is poor, it is better in town
- Identify different trails and ease of mobility for different levels of hikers, similar to Banff National Park

Public Art: (4 comments overall)

- People don't come to a national park to look at artwork
- There isn't enough public art (2)
- Jasper has many artists but no opportunity to give back to the community

Special Events: (4 comments overall)

- Quebec City does a good job with its festivals, model Jasper after something like that
- Financing of community events needs to be looked at
- It's easy to run special events in Jasper
- Parks and the municipality are not assisting with making local events a success, volunteers have to do it all

Customer Service: (2 comments overall)

- Could always improve
- I like the ambassador program

Cultural Identity: (1 comment overall)

- I identify with the mountains, rivers and streams

2.9 Strategic Alliances:

Business owners were asked if they were interested in forming a strategic alliance or partnership with another company. Several companies stated that they are currently operating under a similar model and have reported results, however 60% stated that at this time they were not interested in this option. Many of the home accommodations surveyed stated that they feel they have a strategic alliance in the Jasper Home Accommodation Society. Several companies expressed that they were looking to share a retail space with another business, in this case CFWY recommended that all companies get in touch with the local chamber of commerce to look at possible connections. Another company was hoping to share an office space and an accountant, this company was provided with the list of licensed accountants in the community, based on the active business licence list provided by the Town of Jasper. At this time CFWY has not heard if there was a potential match.

2.10 Barriers to Growth:

When business owners were asked about barriers to growth in the community, 80% identified that there are existing barriers to growth. Jasper businesses were then asked to provide comments on any identified barriers to growth. Responses have been edited only to simplify the message and group with similar comments(Figure #15 and Figure #16).

Figure # 15: Employer Identified Barriers to Growth in Jasper

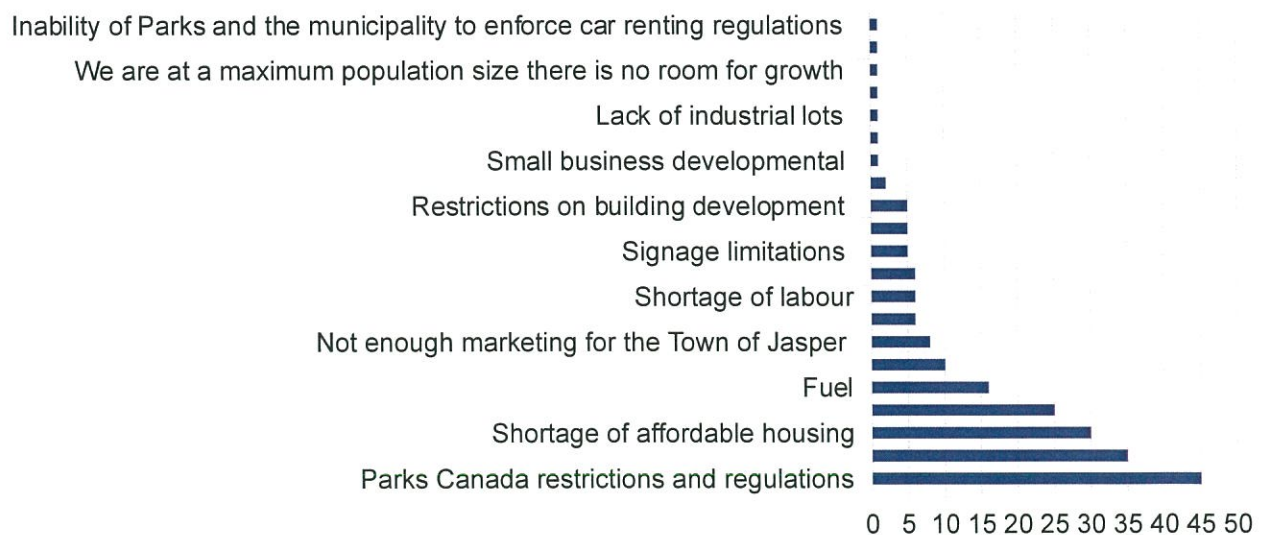


Figure # 16: Employer Identified Barriers to Growth in Jasper

Identified Barriers to Growth in Jasper:	# of Similar responses:
Parks Canada restrictions and regulations	45
Physical restrictions, surrounded by a national park	35
Shortage of affordable housing	30
Parks Canada doesn't want development in Jasper	25
Fuel	16
Zoning	10
Not enough marketing for the Town of Jasper	8
High cost of doing business in the downtown core	6
Shortage of labour	6
High cost of living	6
Signage limitations	5
Airport accessibility	5
Restrictions on building development	5
Limited marketing for destination shops	2
Small business development	1
Limited family programming	1
Lack of industrial lots	1
Lack of hotel inventory	1
We are at a maximum population size there is no room for growth	1
Cost of business licences	1
Inability of Parks and the municipality to enforce car renting regulations	1

2.11 Attracting Suppliers:

Participants were asked if there were specific suppliers that the community should attract to Jasper, 64% feel that there are specific businesses or sectors that the community should attract to the area. The table below states the comments received for this question.

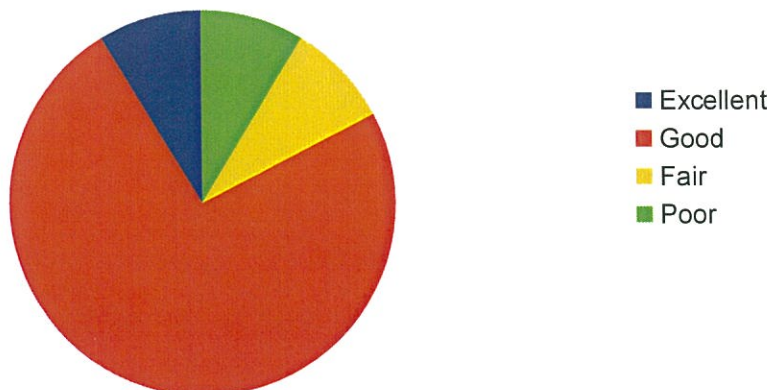
Figure # 17: Attraction of suppliers

Potential Suppliers	# of Similar Responses
Fuel suppliers	8
More grocery options	5
Trades people	3
More ethnic foods and restaurants	2
More locally-made products	2
Airlines	2
Colleges or post secondary institutions	1
Promotional and business suppliers	1
Mechanics and garages	1

2.12 Local Business Climate:

Figure #18: shows that overall 81% of businesses feel that the local business climate is good or excellent. 8 % rated the business climate poor, and felt that major improvements needed to be made in the local business community (Figure #18).

Figure #18: Overall Business Climate



2.13 Prosper and Grow

The final question of the survey was open ended to encourage feedback from the participant. The question was, what should the community of Jasper work on to help all community businesses prosper and grow? (Figure #19). Below is a list of the responses that CFWY received:

Figure #19: Prosper and Grow Responses

Industry:	Comments:
Financial Institutions	<ul style="list-style-type: none"> Jasper could be open for change as a community, be open minded.
Retail	<ul style="list-style-type: none"> Tourism / Events/ Concerts/ Bring more people to Jasper. Encourage dog sledding, Transportation. Build a spray park Bigger library. Better skatepark. Totem Pole is a nice addition. More support and awareness of the business community, Parks Canada and the Municipality Lowering rent and increasing small business initiatives Decrease leasehold rents, provide a price break for locals, look at retention education as a community, create balance of flow between wages and living expenses Get people here, bring revenue to town, promote local shopping, destination and unique shopping, not just Chamber members
Professional Services	<ul style="list-style-type: none"> Affordable housing Customer Service training Increase communications between Parks and Municipality. Encourage growth for existing businesses. Flexibility should be given to businesses looking to expand. Democracy shouldn't get in the way. The legion is a great example
Health Services	<ul style="list-style-type: none"> Reduce the cost of living, cost of leaseholds
Food Services	<ul style="list-style-type: none"> Leasehold costs, fair working conditions customer Service program should be compulsory. Assistance with recruitment challenges. More insensitive for small business owners. Appreciate and support business owners. Explain the decision making process lobby for the return of the Temporary Foreign Workers Program
Accommodation	<ul style="list-style-type: none"> Work on creativity, flexibility, consistency. Enthusiasm for growth, catch up with the rest of the world. Look at the economics of our time affordable housing. Review permit approval process, municipal and land use guidelines. Put in a zip line. Focus more energy on encouraging outdoor tour companies Continue to support local businesses, decrease the number of allowed fast food restaurants. Keep and support small business Encourage local shopping
Construction	<ul style="list-style-type: none"> Take control of development from Parks Canada
Transportation	<ul style="list-style-type: none"> Make it easier to attract workers to Jasper, make it an easy entry into the community Focus more on our heritage, provide information on grant opportunities for groups and non profits

3.0 Conclusions and Recommendations

Below are a list of potential actions and recommendations based on Jasper Business Visitation Study findings. They are meant to be used as a tool for further action in the community of Jasper. The goals are not directed at the Municipality of Jasper or any particular stakeholder. The information contained in this study is to be used as a bench mark and a snapshot in time of the business community.

Development Approval Process:

Goal: Revisit bylaws and regulations of the development approval process, licensing and inspections, zoning and permitting

Goal: Streamline economic development process between Parks Canada and the Municipality

Potential Partners: Parks Canada, the Municipality, the business community, the Chamber of Commerce

Communication:

Goal: Increase transparency of communication from governing bodies to the business community and residents

Goal: Increase and ease communications through regular email correspondence, website updates, community calendar and social media

Goal: Create detailed documents or fact sheets to improve communication and encourage new business opportunities in Jasper

Potential Partners: The Municipality, Parks Canada, Friends of Jasper national Park, Chamber of Commerce, Adult Learning and Literacy, the Jasper Partnership, Tourism Jasper, CFWY

Housing:

Goal: Re-examine staff housing procedures and develop action plans for creative solutions

Goal: Facilitate public forum sessions to generate creative solutions and create community buy in

Goal: Make affordable housing a priority for 2016

Potential Partners: The business community, Parks Canada, the Municipality, The Chamber of Commerce

Develop a Strategic Priority List and Action plan:

Goal: Develop an inventory of existing properties and pricing structure, work towards community standards

Potential Partners: the Municipality, the Chamber of Commerce

Signage:

Goal: Review community signage and bylaws for businesses, create a consistent, transparent inclusive document available for public reference

Goal: Ensure consistency between messaging from the governing partners and staff towards the business community

Potential Partners: The business community, Parks Canada, the Municipality, The Chamber of Commerce, CFWY

3.1 Moving Forward

The Business Visitation Study is meant to represent a bench mark, or snapshot in time. The study is designed to be facilitated every two years and compared to the previous findings. Over this period a full understanding into the economic state of the community of Jasper is visible.

For more information on this study or to receive a copy of this study, please contact:

Community Futures West Yellowhead
221 Pembina Avenue
Hinton, AB
T7V 2B3

T: 780-865-1224
W: westyellowhead.albertacf.com

Appendix A:

2014 Business Visitation Study- Jasper, Alberta

Date: _____

Company Name: _____

Main Contact: _____

Phone Number: _____

Email address: _____

Web address (URL): _____

For office use only:

NAICS code: _____

Date of Meeting: _____

Visit Number: _____

Outreach Specialist: _____

This Business Visitation study is brought to you by :



Disclaimer (Notice to Survey Respondents):

- The Originator of this survey is solely responsible for its contents. **Your response to the survey is voluntary and all responses are confidential.** If you are asked in the survey to reveal your identity or the identity of the organization on whose behalf you are responding and do not wish to do so, please do not respond to the survey. Your response will be used by the survey Originator only for the purpose identified by the Originator.
- If you are given an opportunity to submit free-form responses to a survey, please provide relevant and responsible responses; refrain from disparaging, offensive, harassing or otherwise inappropriate language; and refrain from including any sensitive information of any kind (e.g., credit card or bank account information).

Please Initial: _____

PART A: QUESTIONS ON TYPE OF BUSINESS

1a. In what year did the current owners take over this business?

Year _____

b. Are you the owner? **(Circle)**

Yes No

If *No*, what is your position?

c. What is your current situation?

- (a) Building owner
- (b) Leasehold
- (c) Sub let
- (d) Other: _____

d. How was the business acquired?

- (a) Purchased
- (b) Inherited
- (c) We built it
- (d) Other: _____

2. Is your business locally owned? **(Circle)**

Yes No

If not locally owned, where is your corporate headquarters located?

3. How old are you? **(Circle)**

- a. Younger than 25
- b. 25-34
- c. 35-44
- d. 45-54
- e. 55-64
- f. 65-74
- g. 75 or older

NOTE: Please answer question 4 only if it applies to you, Otherwise skip to question 5.

4. Which of the following best describes your primary lodging operation? **(Circle one)**

- | | |
|-------------------------------|----------------------------|
| (a) Resort (lodge or cottage) | (e) Condominium |
| (b) Convention resort | (f) Campground |
| (c) Bed and breakfast | (g) Other (specify) |
| (d) Hotel/motel | |

5. What is special or unique about your business?

PART B: QUESTIONS ON LABOR USED

For this study, “family employee” = a close relative working for the business

6. How many family employees work at this establishment? **(Please break this out for paid and unpaid family members)**

_____ Number paid family employees

_____ Number unpaid family employees

7. Have you used the Temporary Foreign Workers Program?

Yes No

If *Yes*, what percentage of your workforce do those individuals make up?

Comments:

8. How many other paid employees work at this establishment? (Please break it out by the categories shown below) (Circle)

Year Round		Winter Seasonal		Summer Seasonal	
Part-time	Full-time	Part-time	Full-time	Part-time	Full-time
_____	_____	_____	_____	_____	_____

9. How many of the jobs are held by students? _____

High school students _____
Post-Secondary students _____

Note: IF YOU HAVE NO EMPLOYEES, YOU CAN SKIP TO PART C.

10. Does your business have problems recruiting paid employees in the following categories? (Circle appropriate answer: Yes or No)

Year Round		Winter Seasonal		Summer Seasonal	
Part-time	Full-time	Part-time	Full-time	Part-time	Full-time
Yes	No	Yes	No	Yes	No
_____	_____	_____	_____	_____	_____

11. Does your business have problems retaining paid employees in the following categories? (Circle appropriate answer: Yes or No)

Year Round		Winter Seasonal		Summer Seasonal	
Part-time	Full-time	Part-time	Full-time	Part-time	Full-time
Yes	No	Yes	No	Yes	No
_____	_____	_____	_____	_____	_____

12. What are the average wages for each type of employee and what benefits are provided? (Circle if available)

Type of Employee	Average Wage / Hour	Health Plan*	Retirement*	Vacation*	Sick Leave*
Year Round – Part-time		Y or N	Y or N	Y or N	Y or N
Year Round – Full-time		Y or N	Y or N	Y or N	Y or N
Seasonal					
Part Time		Y or N	Y or N	Y or N	Y or N
Full Time		Y or N	Y or N	Y or N	Y or N

NOTE: For the purpose of the next question, "special training" is defined by a specific set of skills that the employer is not expecting to train the new employee on the jobsite.

13. Do your employees require any "special" training?

Yes No

If Yes, please explain this more fully.

14. Overall, how do you rate job seekers looking to work at our business with respect to the following? (Circle one per line)

		Excellent	Good	Fair	Poor	Very Poor
a)	Attitude toward work	5	4	3	2	1
b)	Productivity	5	4	3	2	1
c)	Customer Service	5	4	3	2	1
d)	Knowledge of tourists' needs and desires	5	4	3	2	1
e)	Knowledge of area tourism opportunities	5	4	3	2	1

PART C: BUSINESS CONDITIONS AND TRENDS

NOTE: Answer either 15a, 15b, 15c, depending on industry.

For questions 15a. and 15b. : “Tourist” = non-seasonal recreational or family visit,
 “Non tourist” = all visitors not included in “tourist” definition

15a. For lodging businesses:

For each season please estimate the following number of units and average occupancy rates

	Average % Occupancy Rate- Tourists	Average % Occupancy Rate- Non tourists
Winter Dec, Jan, Feb		
Spring Mar, Apr, May		
Summer June, Jul, Aug		
Fall Sep, Oct, Nov		

15b. For camping businesses:

	Average % Occupancy Rate- Tourists	Average % Occupancy Rate- Non tourists
Winter Dec, Jan, Feb		
Spring Mar, Apr, May		
Summer June, Jul, Aug		
Fall Sep, Oct, Nov		

15c. For all other businesses: In a typical year, are you closed for any months of the year? **(Circle all that apply)**

January	April	July	October
February	May	August	November
March	June	September	December

16. What percent of your customers are in each of the following categories?

(a) Conference/convention business	Lodging _____%	Camping _____%
(b) Visitors – family vacation	_____%	_____%
(c) Seasonal residents	_____%	_____%
(d) Other (specify) _____	_____%	_____%
(Check that the total adds to 100 percent.)	_____%	_____%

17. Where are your customers from? **(List percent from each geographic area)**

Atlantic Provinces _____%	Australia _____%
Manitoba _____%	Europe _____%
Quebec _____%	Asia _____%
Saskatchewan _____%	South America _____%
Ontario _____%	USA _____%
Alberta _____%	Regional _____%
British Columbia _____%	Local _____%

(Check the total to see that it adds to 100 percent.)

18. What percentage of your customers are repeat customers?
 _____%

19. What new products or services do you think your customers will want from your business in the next 5-10 years?

20. Is new technology emerging that will change your company's product or how it is produced? **(Circle)**

Yes No

If Yes, please explain:

21. Over the last two years, have the following business factors increased, stayed the same, or declined? **(Circle)**

	Increased	Stayed the same	Declined
Number of customers	+	same	-
Sales- total revenue	+	same	-
Profits	+	same	-
Employees- full time	+	same	-
Employees- part time	+	same	-

22. If any of the business factors increased or decreased, what were the principal reasons for the changes?

23. To what degree do the following factors affect your annual adjustment of prices? **(Circle one)**

	Greatly		Somewhat		None
Property taxes	5	4	3	2	1
Insurance premiums	5	4	3	2	1
Energy costs	5	4	3	2	1
Labour costs	5	4	3	2	1
Mortgage or bank debt	5	4	3	2	1
Other _____	5	4	3	2	1

PART D: FUTURE BUSINESS PLANS

24. Over the next two years, do you think the following business factors will increase, stay the same, or decline? **(Circle)**

	Will Increase	Will stay the same	Will decline
Number of customers	+	same	-
Sales-total revenue	+	same	-
Profits	+	same	-
Employees- full time	+	same	-
Employees- part time	+	same	-

25. If you expect any of these business factors to increase or decrease, what are the principal reasons for the changes?

26.a) Are you currently considering renovating or expanding your building or facilities? **(Circle)**

Yes No

If you answered Yes to 26a, then answer 26b; otherwise skip to 27

26.b) If you answered yes to question 26a, what impact will this have on the number of people you employ? **(Circle)**

- (a) No change
- (b) Add employees -----→ How many? _____→ _____ Jobs
- (c) Reduce employees -----→ How many? _____→ _____ Jobs

27. If you face constraints to renovation or expansion, what are they? **(Circle all that apply)**
Please elaborate on any specific problems.

- (a) Inadequate financial return on leasehold improvements

- (b) Inability to get loan

- (c) Insufficient space available for expansion

- (d) Environmental/pollution control

- (e) Planning and zoning guidelines

- (f) Municipal government regulations

- (g) Parks Canada regulations

- (h) Federal government regulations (Government of Canada)

- (i) Lack of knowledge in identifying resources and assistance

- (j) Shortage of adequate labour

- (k) Shortage of adequate housing for employees

- (l) Other (please specify)

28. Are you currently considering moving, closing or selling your business? **(Circle all that apply)**

- (a) Considering moving If so, when: _____
- (b) Considering closing If so, when: _____
- (c) Considering selling If so, when: _____
- (d) Not at this time

Comments:

NOTE: If you answered a, b or c to question 28, then answer question 29; otherwise go to 30.

29. Why are you considering moving, closing, or selling? **(Circle all that are appropriate)**

- (1) changing market conditions in travel and tourism industry
- (2) obsolete building
- (3) redevelop the property
- (4) high property value
- (5) pass it on to another generation in the family
- (6) no land for expansion
- (7) transportation problems
- (8) crime/vandalism
- (9) low work productivity
- (10) environmental concerns
- (11) rigid code enforcement (including ordinances and building codes)
- (12) high property taxes
- (13) lease expiration
- (14) poor telecommunications
- (15) declining population
- (16) insufficient labour supply
- (17) retiring
- (18) another business opportunity
- (19) business loans
- (20) other (please specify) _____

PART E: INFORMATION NEEDS

30. Would you like additional information concerning any of the following business or employee-related subjects? **(Circle yes for each one you want)**

	(If Yes, specifics?)
Customer Service training	Yes _____
Financial management	Yes _____
Computer-related training	Yes _____
Internet/E-business	Yes _____
Marketing/advertising planning	Yes _____
Business plan development	Yes _____
Business development resources	Yes _____
Entrepreneurs with Disabilities	Yes _____
Job Sharing / alternative workplace solutions	Yes _____

31. In general, what is your preferred method for obtaining new informational material? **(Circle those that apply)**

- (a) Workshops
- (b) Audio CD's
- (c) Fact sheets
- (d) Other publications
- (e) Internet
- (f) Personal consultation
- (g) Email
- (h) Social Media
- (i) Webinar
- (j) Other _____

32. If you asked for information in question 30, we can send you a list of the agencies that provide this, or we can ask them to send you information on the items that you circled. Which do you prefer? **(Circle one.)**

- (a) Send me the list of agencies/organizations
- (b) Ask agencies to send me information directly

NOTE: If you circled (b), we will not give the agencies any information except your request for this information.

33. While we can't guarantee to find it, we would like to know if there are other topics, in addition to those listed in question 30, on which you would like information? If so, what topics?

34. Please rate the following:

Please use the following rating scale:

1=Excellent; 2= Good; 3= Average; 4= Fair; 5= Poor

Services:	1	2	3	4	5
Access to airport facilities:					
Access to highway/ roadway:					
Adequate signage:					
Access to suppliers:					
Availability of road transport services:					
Availability of rail transport:					
Availability of warehousing:					
Disposal of waste materials:					
Recycling:					
Inspections (eg. Licensing):					
Development approval process:					
Internet:					
Telephone:					
Availability of appropriately zoned land:					
Water and sewerage supply:					
Other (Please Specify):					

Comments:

35. Do you have any suggestions on how to improve any of the services and infrastructure listed in question 34?

Yes No

If Yes, How?

36. In Terms of doing business, how do you rate this community with respect to these factors?

Please use the following rating scale:

1=Excellent; 2= Good; 3= Average; 4= Fair; 5= Poor

Rate Community Factors	1	2	3	4	5
Community beautification initiatives:					
Infrastructure services:					
Labour:					
Transportation:					
Storage:					
Development approval:					
Raw Materials:					
Fuel:					
Permit Fees:					
Land:					
Buildings:					
Leasing Space:					
Construction:					
Telecommunications:					
Taxes:					
Staff Housing:					
Other: (Please Specify):					

37. Do you have suggestions on how to improve any of the community factors listed in question 36?

Yes No

If Yes, How?

38. Please rate the overall local business climate:

Excellent	Good	Fair	Poor

Comments:

39. a) Based on the following community services, please grade this location as a place for your company to do business (**Circle**)

A= Excellent; B=Good; C=Average; D=Poor; E=Very Poor

	Rate Community Services:				
a)	Street Maintenance / Drainage	A	B	C	D E
b)	Water and Sewer	A	B	C	D E
c)	Emergency Medical Services	A	B	C	D E
d)	Fire Protection	A	B	C	D E
e)	Police Protection	A	B	C	D E
f)	Health Care Facilities	A	B	C	D E
g)	Electricity Cost and Reliability	A	B	C	D E
h)	Natural Gas Cost and Reliability	A	B	C	D E
i)	Telecommunications Services	A	B	C	D E
j)	Solid Waste Disposal	A	B	C	D E
k)	Zoning and Permitting	A	B	C	D E
l)	Code enforcement	A	B	C	D E
m)	Available Building Space	A	B	C	D E
n)	Available Land	A	B	C	D E
o)	Public Schools	A	B	C	D E
p)	Francophone Schools	A	B	C	D E
q)	Financial Institutions	A	B	C	D E
r)	Child Care	A	B	C	D E
s)	Post-Secondary Education	A	B	C	D E
t)	Local Chamber of Commerce	A	B	C	D E
u)	Municipal Airport	A	B	C	D E
v)	Destination Marketing	A	B	C	D E

b) Please rank in order of appearance the three factors you would consider the greatest strengths as a community to do business in, from the chart above:

1. _____
2. _____
3. _____

Please rank in order of appearance the three factors you would consider the greatest weakness as a community to do business in, from the chart above:

1. _____
2. _____
3. _____

40. Are there any barriers to growth in this community?

Yes No

If Yes, what are they?

41. Are there suppliers that we should attract to this region?

Yes No

If Yes, please list:

42. In terms of doing business, how do you rate this community with respect to these factors:

A=Excellent; B=Good; C=Average; D=Poor; E=Very Poor

Built environment	A	B	C	D	E
Public space aesthetics	A	B	C	D	E
Parks	A	B	C	D	E
Trail network	A	B	C	D	E
Sports facilities	A	B	C	D	E
Public art	A	B	C	D	E
Street use	A	B	C	D	E
Wayfinding	A	B	C	D	E
Parking	A	B	C	D	E
Special events	A	B	C	D	E
Cultural identity	A	B	C	D	E
Customer service	A	B	C	D	E
Community Spirit program	A	B	C	D	E
Other (please specify):	A	B	C	D	E

43. Are you interested in forming a strategic alliance or partnership with another company? **(Circle)**

Yes No

If Yes, please describe the type of project, desired assistance and timeline:

44. What should the community of Jasper work on to help all community businesses to prosper and grow?

45. Is there anything you would like to add that we have not addressed?

Thank you for participating in the Business Visitation Study. Your identity will be kept confidential.

For more information please contact:

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