



2016/2017 Jasper Business Visitation Study

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Prologue:

Community Futures West Yellowhead (CFWY) serves the West Yellowhead region including Edson, Hinton, Jasper, Yellowhead County and Grande Cache. This Business Visitation Study is part of a four-year study on each of the communities that CFWY serves.

The Jasper Business Visitation Study is comprised of three distinctive parts. It follows 138 local businesses through a period of two years in the community of Jasper, documenting challenges and opportunities, providing a snap shot in time from 2014-2016.

Each of the studies appear in this document in the format they were composed and each contain an executive summary and follow up recommendations. Part one of the study (the 2014 Business Visitation Study) was funded by a grant from Alberta Human Services, the remainder of the study was funded by Community Futures West Yellowhead.

For more information on these studies, or to receive a paper copy, please contact Community Futures West Yellowhead. The study is available online www.westyellowhead.albertacf.com.

Community Futures West Yellowhead would like to thank the following people who assisted with the Jasper Business Visitation Study:

Councillors and Mayor of the Municipality of Jasper
Parks Canada
The Jasper Park Chamber of Commerce
The Jasper Partnership Initiative
The board and staff of Community Futures West Yellowhead
Western Economic Diversification
Business owners in the community of Jasper
Grande Prairie Regional College Hinton and Jasper Campus
Nancy Robbins, General Manager, CFWY
Morgan Roberts, Business Visitation Coordinator, CFWY, Roberts Consulting

Disclaimer:

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Executive Summary:

In the fall of 2014 Community Futures West Yellowhead started a Business Visitation Project that focused on Business Retention and Expansion (BRE) in each of the communities that it serves. The first study to be completed was the Jasper Business Visitation Study which was comprised of 138 face-to-face interviews with local businesses within the municipality. The study was used to determine the needs and opportunities for business growth in the community through a systematic approach. Using a structured information gathering method of one on one interviews with individual businesses, CFWY built dialogue with local businesses to identify issues, goals and potential opportunities. In 2016 the same 138 businesses were contacted with 113 agreeing to be interviewed a second time, providing a snapshot in time of the local business market. This report focuses on the distinctive changes since the initial study and looks at trends of the Jasper business market.

There is a definite pride that comes from living in Jasper, and it is easy to see why businesses and residents are involved in the community. Residents completed a satisfaction survey in 2016 through the Municipality¹ with very positive results in satisfaction overall with the community. There were very few questions in the satisfaction survey centred around the business community, however some of the themes are similar in both documents, and aid in providing a snapshot in time of the community.

The original 2014 Jasper Business Visitation Study was based on six sections, including type of business, questions on labour, business conditions and local trends, future business plans, informational needs, and community satisfaction factors. Interviews were conducted one on one with business owners or managers and generally took 25-30 minutes. In 2015 a one-year follow up was completed on the original study recommendations and specific action taken on the outlined 2014 Jasper Business Visitation Study².

In 2016 the same original businesses were asked six follow up questions. Topics included state of business, changes over the past two years, growth measurements based on the 2014 Jasper Business Visitation Study recommendations, and questions based on community relationships with the Jasper Municipality, Parks Canada and the Jasper Park Chamber of Commerce. The information collected in both Jasper Business Visitation Studies is intended to build dialogue with local businesses, and Community Futures West Yellowhead has designed the documents to be used as a practical resource for the community. In the 2016 Business Visitation Study the results are not always broken down by sector as it is in 2014. Due to our population size being

¹In fall 2016 the Municipality of Jasper completed a Resident Satisfaction Survey, a total of 400 respondents completed the survey, <http://www.jasper-alberta.com/2307/Resident-Satisfaction-Surveys>.

²The 2014 Jasper Business Visitation study and the 2015 community follow-up can be viewed online at www.westyellowhead.albertacf.com.

small in some sectors, Community Futures West Yellowhead wanted to ensure confidentiality in responses for local businesses.

58% of businesses in Jasper categorized themselves as primarily maintaining in 2016. Many businesses cited traveller numbers up, with customer numbers up by 36%, but sales being only marginally better than 2014 and 2015. Businesses often described shoppers as being “thrifter” with spending habits and more likely to window shop than spend money within the retail sector. Attraction-based businesses did report increases in tour numbers and felt that travellers were looking for more experiences rather than “trinkets”, often taking pre-made lunches and snacks with them rather than purchasing while on the excursion.

Staffing levels of Jasper businesses stayed relatively consistent from 2014 to 2016 with a major concern still being affordable labour and accessible staff housing. There have been some noticeable changes since the initial 2014 study surrounding Temporary Foreign Workers (TFW’s)³, however staffing levels moving into 2017 seem to have stabilized. In 2014 the TFW program underwent significant changes to its policies and accessibility for Jasper businesses, leaving many without sufficient workers. In 2016 employers have made changes to accommodate their new reality, with the newest concern being increases to minimum wage levels across all industries. Flexible housing solutions have experienced some growth with the new development of an in-town hostel. This community addition has assisted with traveller’s accommodations, but does not address ongoing staff housing concerns for local businesses.

Profits of Jasper businesses are reported as seeing little to no increase from 2014 (44% stayed the same), however sales total revenue has seen a 41% increase. Most businesses described the situation as being impacted by rising operating costs including the new minimum wage increases⁴. In 2014 the Jasper Business Visitation Study found the local average wage of non-managerial positions in Jasper to be \$12.50 per hour and without any additional health, vacation, or retirement benefits above provincial requirements. On October 1, 2016, the province of Alberta increased the provincial minimum wage to \$12.20 with a staggered increase plan to raise the amount to \$15.00 per hour by 2018. Local business support organisations have set up multiple information sessions with members of the Alberta Government, providing Jasper business owners the opportunity to ask questions about the minimum wage increases and have their comments recorded. The topic remains a heated discussion locally with business owners wondering how they will afford to keep their doors open and provide the same level of service moving forward. The retail sector appears to be the hardest hit with many retail business owners stating that they have seen shortcomings through the summer season and into the fall, leading them to wonder how leaner months will ultimately look moving forward.

³Temporary Foreign worker program will remain unchanged: MP Jim Eglinski, Jasper FitzHugh, 04-15-2015, <http://www.fitzhugh.ca/temporary-foreign-worker-program-will-remain-unchanged-mp-jim-eglinski/>.

⁴Local businesses concerned about minimum wage hike, Jasper FitzHugh, 12-06-2016, <http://www.fitzhugh.ca/local-businesses-concerned-about-minimum-wage-hike/>.

Bylaw and regulation streamlining was an important topic in 2014 for business owners. Businesses stated that they felt favouritism towards specific businesses and inconsistent regulations across the business community. In 2016 Community Futures West Yellowhead asked business owners if they saw any change in the situation. Most businesses stated that there had been no visible growth on the topic, however Community Futures West Yellowhead has learned that there are discussions taking place between governing bodies, the Municipality of Jasper and Parks Canada, in an effort to streamline the business procurement process. In discussions with the Municipality of Jasper, Community Futures West Yellowhead has been told they are looking to streamline the process between both governing bodies, and will continue that process into 2017. Details on how this process may affect local business owners were not available to Community Futures West Yellowhead.

Housing policies and procedures have also been identified by local businesses and residents of Jasper as being a priority area. Housing has always been a challenging situation in Jasper with a very slim vacancy rate for the community overall. While businesses stated that they saw little to no change in the housing scenario, Community Futures West Yellowhead found that things are looking positive. In 2016 the Jasper Community Housing Corporation, a local non-profit started with the goal to create affordable sustainable accommodation for the vitality of the community, rallied support for the construction of 300 new accommodations with the intent to provide staff housing for businesses and seniors⁵. The group is currently in discussions with the Municipality of Jasper and Parks Canada regarding the project. Some business owners commented on the Jasper Co-op housing projects⁶, stating that the idea was good in principle, but lacked future vision. Due to the shortage of housing overall, most co-op owners will be members for their lifetime and accommodations will not experience turnover in ownership for many years thus not relieving any tension in the housing market in the immediate future.

Commercial space in Jasper has been described as “debilitating” for Jasper businesses due to its expensive nature. While businesses appear to have more store front options in the town site of Jasper in 2016 compared to 2014, prices of commercial space still make expansion and start up challenging in the community. There are noticeable vacancies throughout the downtown core, some consistently vacant since the original Jasper Business Visitation Study. There has been change to the local retail sector of the community with several businesses closing their doors since our initial study. While not something the Jasper Business Visitation Study specifically studied, Community Futures West Yellowhead is aware that there have been new businesses opened within Jasper during the timeframe. While some degree of commercial vacancy is realistic for a community of Jasper’s size, areas of the community remain vacant without interest due to unattainable rental prices. Business owners expressed that 2017 could prove to be a challenging year with local tourist trends showing more travellers spending less money but still

⁵Community Demonstrates Jasper’s need for housing, 03-10-2016, Jasper FitzHugh, <http://www.fitzhugh.ca/community-demonstrates-jaspers-need-for-housing/>.

⁶There are currently three privately managed affordable housing cooperatives in Jasper: Caribou Creek Co-ops, Mountain Park Co-Ops, and Southview Co-ops, <http://jasper-alberta.com/2459/Looking-for-Housing>.

requiring the same level of services. Coupled with increases to minimum wage and rising costs of doing business, it leaves some business owners with questions on how they will carry on their business long term.

The final questions on the 2016 Jasper Business Visitation Study centred around relationships between the business sector and the Jasper Municipality, Parks Canada and the Chamber of Commerce. These questions focused on what each is currently doing well, what they could improve on, and what they should stop doing to improve the relationship and the business community overall. These questions go into detail in the later parts of the study but focused on several main topics. Communication needs to be consistent and readily available from all governing parties, the retail sector requires increased communication and support on ongoing local challenges, the Tour of Alberta project will require substantial support and resources that won't be found easily, infrastructure of backcountry areas need to be considered when planning ongoing park maintenance and housing needs to be made a local priority, as well as a community driven project.

The Jasper Business Visitation Study is meant to be a snapshot in time looking at the challenges and opportunities of doing business within the community of Jasper. For more information on Community Futures West Yellowhead, the business visitation process or other regional studies please visit www.westyellowhead.albertacf.com.

Methodology:

The 2014 Jasper Business Visitation Study consisted of 45 questions and a 25-30 minute one on one interview. Business owners were encouraged to be honest and forthcoming with their feedback, with interviewers asking for potential solutions to all identified problems. Detailed notes were taken for each of these interviews and the responses formed the 2014 Jasper Business Visitation Study. The responses from the initial questions were then gathered and compiled by NAICS code⁷ to look specifically at targeted industries. All information gathered about the business identity is confidential and was not to be shared with the public. The 2014 survey is available in Appendix A of this document.

Data entry of the 2016 surveys was completed by the staff of Grande Prairie Regional College in Hinton, Jasper and Edson. This allowed for an objective partner to view the data confidentially and make sure that there was consistency in entering the data from survey to survey.

The data collected for the 2014 Jasper Business Visitation Study provides a snapshot and benchmark for the business community. The intention of the follow up in 2016 is to compare the data collected in 2014 and further develop the trends in not only the community, but the region overall. In 2016, CFWY made a concerted effort to follow up with the specific 138 originally interviewed businesses. Unfortunately, not all the businesses originally interviewed in Jasper still remained operational in the community. CFWY was able to interview 113 of the original businesses interviewed in 2014.

A smaller survey of six questions was developed for the second-year follow up and consisted of questions focusing on the current state of business, changes over the past two years, community changes based on the 2014 BVS recommendations, and relationship changes between the Municipality, Parks Canada, the Chamber of Commerce and the business community. The 2016 survey is available in Appendix B of this document.

⁷The North American Industry Classification System (NAICS Codes) are used by business and government to classify business establishments according to type of economic activity.

Figure #1:

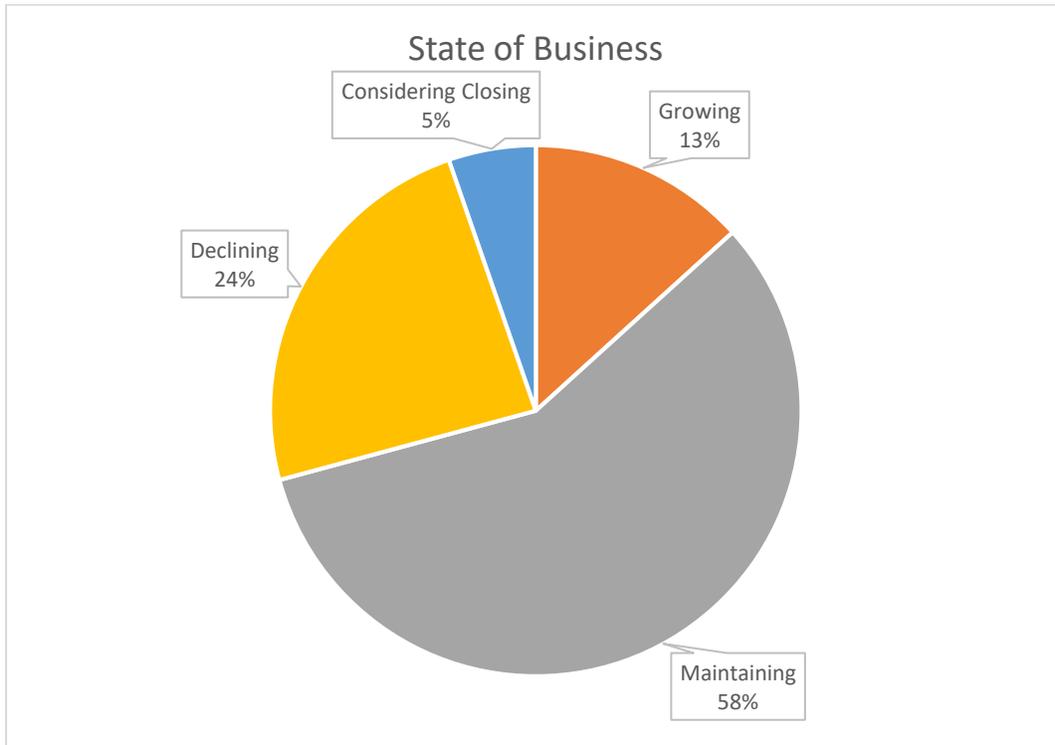
Total # of businesses interviewed in 2014	138
Breakdown of those 138 businesses in 2016:	
# of businesses interviewed	113
# of businesses interviewed in 2014 but were closed in 2016	7
# of businesses from the 2014 survey that refused to answer the survey or were unable to be contacted during the 2016 interviews	18

Due to the seasonal nature of some of Jasper's local businesses, Community Futures West Yellowhead was unable to reach some of the business owners for a follow up interview in 2016 (breakdown in Figure 1). Every effort was made to speak with the highest level of management available in each business and when possible the owner was interviewed by Community Futures West Yellowhead. In 2014, 66% of the interviews were completed with the owner of the business. While not tracked in 2016, Community Futures West Yellowhead interviewed the same person who was interviewed in 2014 whenever possible.

State of Business:

Jasper businesses were asked to categorize their state of business. In 2016 58% reported that they are maintaining and 13% identified themselves as growing. 24% felt that their business was in decline and 55% were considering closing at the time of the interviews.

Figure #2: State of Business n=113



In Jasper, due to its high and low seasons, summer is often a time when businesses complete the majority of their year round sales. Unfortunately, during our interviews CFWY was told on multiple occasions by members of the retail business sector that their summer numbers were not nearly as high as they had anticipated, making them concerned for the shoulder seasons. In the shoulder seasons (fall and spring) many businesses close or operate on reduced hours to keep costs lower while revenues are lower, this is the case for a number of seasonal businesses and restaurants in Jasper.

However increases in the traffic level to the park have jumped significantly from 2014, in 2015 Travel Alberta reported a record year for park traffic⁸. While this doesn't guarantee sales within the local business it does suggest that people are traveling more than in the last few years. A

⁸Tourism spikes in mountain parks amid Alberta economic slump, CBC news 10-29-2015, <http://www.cbc.ca/news/canada/calgary/banff-tourism-up-summer-1.3293881>.

number of factors likely contributed to higher traffic flow, the low Canadian dollar and weak energy prices attract tourists to visit locations closer to home. However, on the street businesses are seeing different results. “Consumers are traveling in small groups and window shopping” rather than purchasing souvenirs of their travels, one retailer described, it as “pack shopping” where 3-4 individuals will come into the store, try things on, and take photos and instead of all purchasing an item, only one will walk out with a purchase. This “thrifty” attitude has spilled over into the food service sector as well with restaurants noticeably not as busy as other peak times. Faster service and take out items including sandwiches and ‘grab and go food’ has been less affected than traditional sit down restaurants.

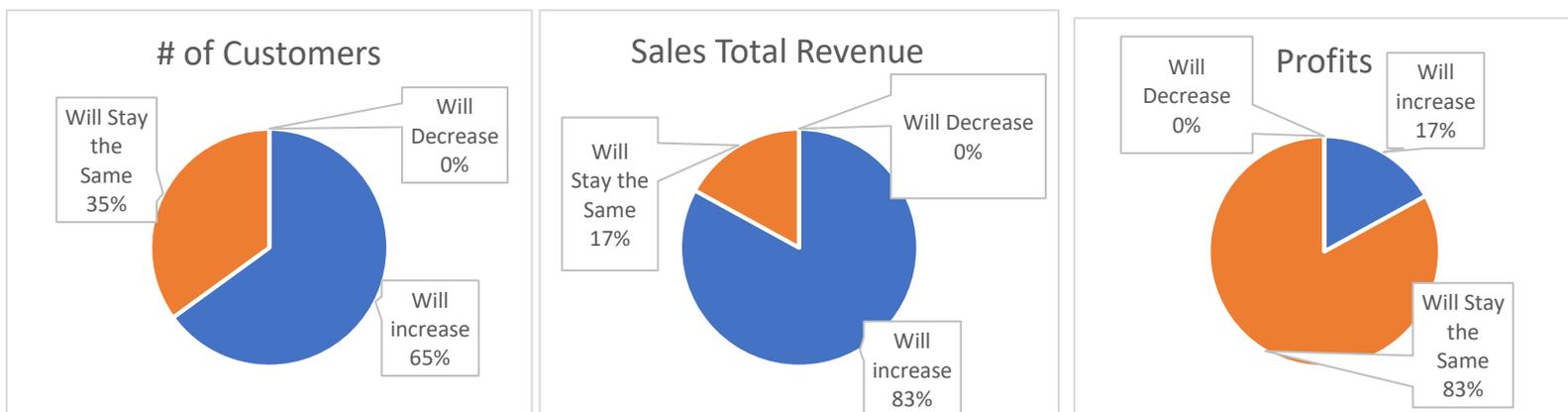
Multiple attraction businesses had commented that guided adventure booking numbers were up from 2014, but the sale of trinkets and food items above the original package price were down significantly. “Tourists are bringing bagged lunches and snacks on excursions” to save on cash purchases said one adventure retailer. This behaviour is typical for the consumer levels being experienced in 2015 and 2016, with families starting to spend after a changing economic year in 2014/ 2015⁹.

⁹The owl- A breakdown of Alberta’s Retail Sector, 08-30-2016, <http://us7.campaign-archive2.com/?u=e425b7083c1526d250de3c060&id=5af93edbca&e=fcb7bd7287>.

Distinctive Changes:

In 2014 businesses were asked to make predictions of their projected changes from 2014- 2016. Predictions included potential increases for number of customers, changes to their sales total revenue and profits. Figure 2 below illustrates what Jasper businesses expected for changes from 2014-2016. At the time, they expected marginal increases in the number of customers, with increases in sales total revenue. However, most businesses felt that the profit margin would remain the same as 2014. They mostly accredited that leveling property to the rising costs of doing business. Business owners talked about hopeful growth and wanting to reinvest back into their businesses, and were optimistic about the future with no expectation of declining customers, profits or sales total revenue.

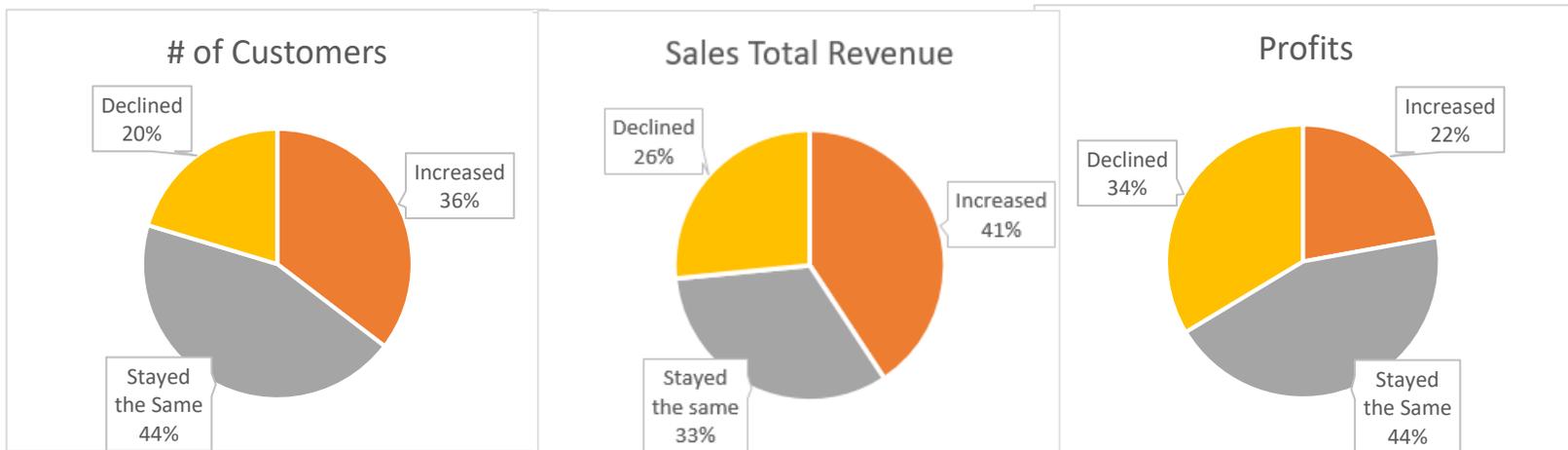
Figure #3: Projected changes for 2014-2016 as predicted in the 2014 Jasper Business Visitation Study n=138



Looking ahead to the 2016 Business Visitation Study business owners were asked to reflect on the past two years (2014-2016). Businesses expected the number of consumers to increase based on 2014 predictions, when comparing actuals businesses stayed closer to their original 2014 customer totals. The prediction of no decreases in number of customers was not the reality for all businesses with some businesses reporting a 20% decline in number of customers. For this question a customer is someone who purchases a product or service in the business. Many businesses stated that they had more traffic through the businesses, unfortunately they were not necessarily consumers.

Looking at the prediction in 2014 for the sales total revenue, businesses were optimistic about business growth for the future. The actuals depict a modest 41% increase in sales total revenue overall. Profits had been expected to stay the same from 2014-2016, and while they did (41%) they also declined by 34%.

Figure #4: Business owners reflect on 2014-2016 actuals n=113



Growth from 2014 Jasper BVS recommendations:

In 2014 a series of recommendations were proposed through the Jasper Business Visitation Study. Potential partners were identified and individual goals outlined. Each of the suggested partners were contacted and provided with copies of the study and offers of assistance from CFWY to pursue the goals. In 2015 for the one year follow-up¹⁰ a report was written to depict a snapshot in time, identifying the community's progress in working toward the identified goals.

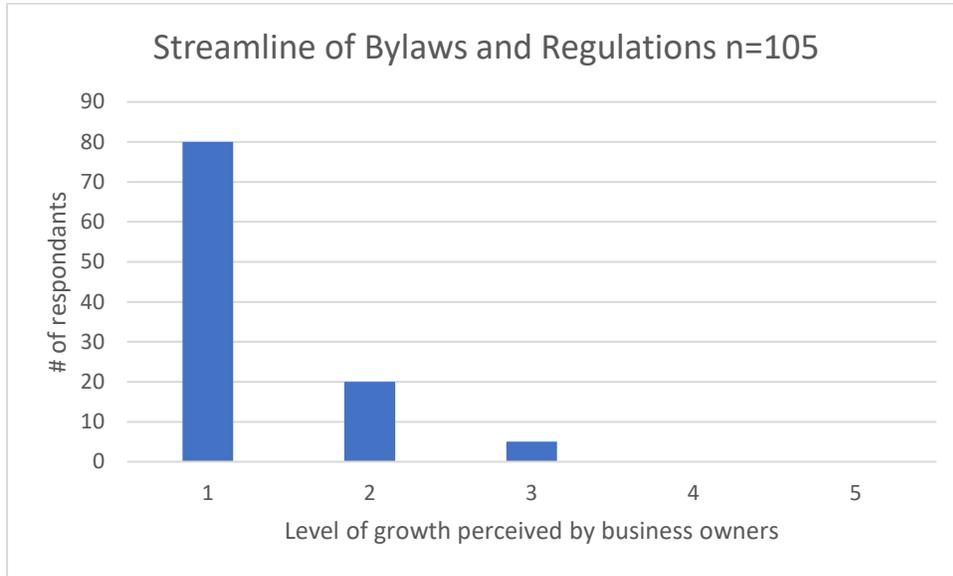
In the 2016 survey business were asked about their perception of growth towards resolving challenges identified in the original survey. Each recommendation was presented with the possibility to have growth depicted on a scale of 1-5. For our purposes, each statement will be listed with the average response provided by Jasper business owners.

Note: *The following statements depicts the perceived growth by business owners and CFWY is not implying that the level identified by business owners is in fact the level of progress completed on the goal / activity. CFWY is a Community Economic Development and Entrepreneurial support organization and has established a role of assistance, not as a lead, on any of the following projects.*

¹⁰The one year follow up for the Jasper Business Visitation study can be found on CFWY's web page, www.westyellowhead.albertacf.com.

Over the past two years, have you seen growth in the following areas of Jasper?

Figure #5:

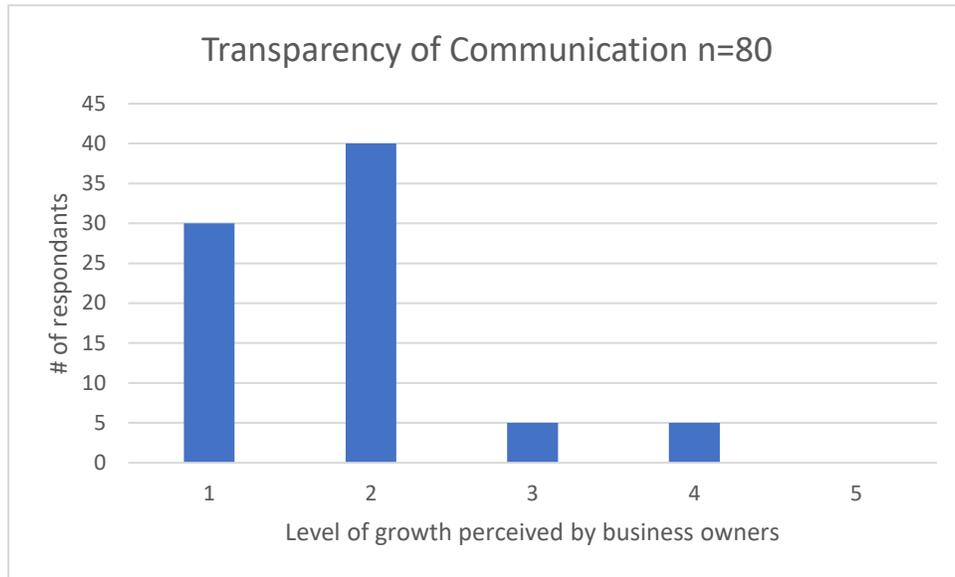


Average Rating Level: No Noticeable Growth

Identified Goal: Streamline of bylaws and regulations of the development approval process, licensing and inspections, zoning and permitting between parks Canada and the Municipality of Jasper

While business owners stated that they hadn't seen a shift to date, some businesses were hopeful that the change was coming. With new protocols being established and both Parks and the municipality committing to look at this subject for 2017 it is hopeful that the goal is being worked towards. In 2016 the chamber in partnership with the municipality and Parks Canada decided to take on the task of simplifying the business licencing process in Jasper, at this time nothing has been established and released to the public other than the information that it is being worked on.

Figure #6:

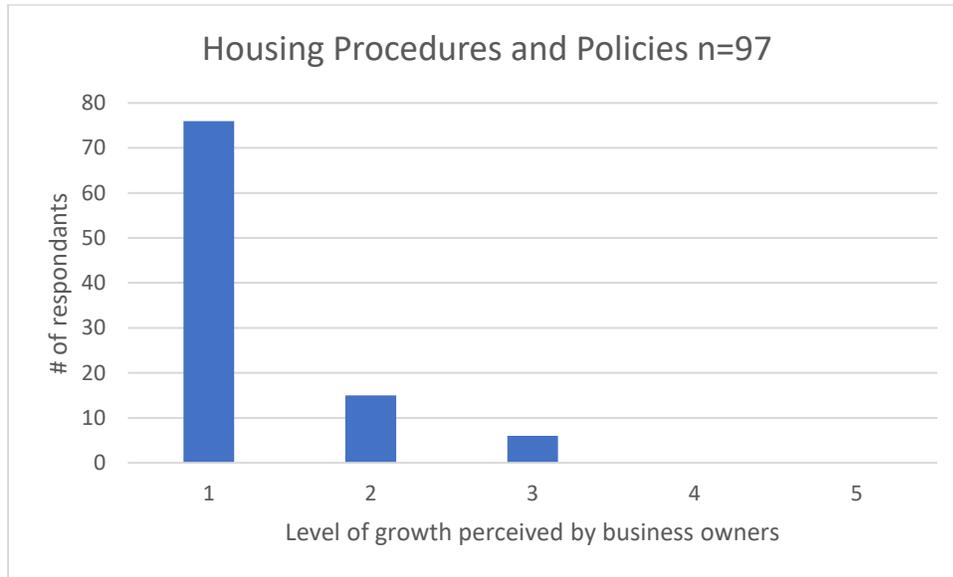


Average Rating Level: Marginal Growth

Identified Goal: Transparency of communication from the governing bodies in the community to the business community and residents

Communication transparencies remains a topic of concern for Jasper businesses, however there has been marginal perceived growth in this area. Businesses cited the NETMA (No-one Ever Tells Me Anything) group as a positive addition to the community. Businesses also cited an increase in visible chamber members throughout the community. While comments suggest that businesses would like to see more business walks and outreach, these are positive improvements.

Figure #7:

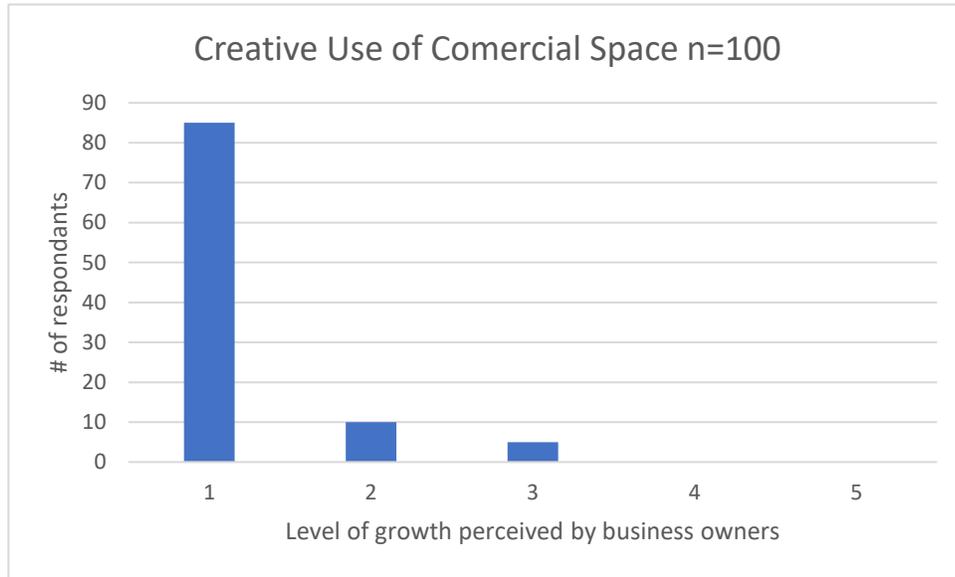


Average Rating Level: Marginal Growth

Identified Goal: Housing Procedures and Policies

Businesses described the housing situation in Jasper as being a “chronic problem” for business and residents. There were comments made that suggested that there has been marginal growth towards 2016 and 2017 with respect to a new housing group formed by businesses and residents. Information is still being collected and analysed and the idea is expected to come before Parks and the Municipality sometime in 2017.

Figure #8:

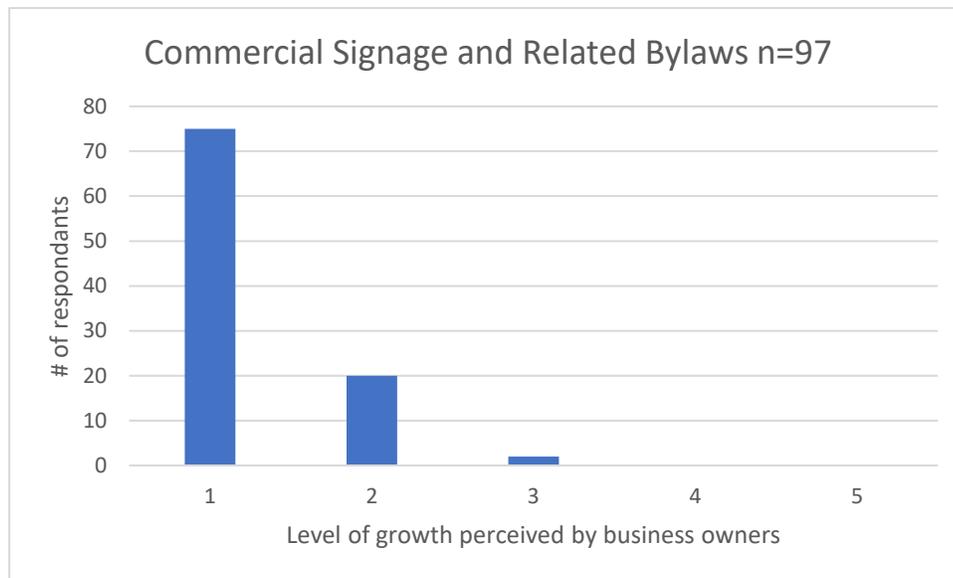


Average Rating Level: No Noticeable Growth

Identified Goal: Creative use of commercial space for businesses to start up, expand and grow

Commercial spaces in Jasper are often seen as being unaffordable or challenging by the average business. There are a noticeable number of open store fronts within the business sector, that businesses feel are too expensive to consider. Businesses reported no noticeable growth in the goal of using commercial space creatively for business expansion and start up.

Figure 9:



Average Rating Level: No Noticeable Growth

Identified Goal: Commercial signage and related bylaws

No noticeable growth was detected by business owners on the topic of commercial signage and related bylaws. Favoritism was often mentioned in relation to this question as well as the idea that Parks Canada is “watching like a hawk” for discrepancies in signage bylaws.

Business Relationships:

The final three questions on the 2016 Business Visitation Study centred around the relationship building between businesses and the Municipality of Jasper, Parks Canada, and the Chamber of Commerce. The following are comments based on what they could do to improve the relationship, continue to do to improve the existing relationship and what they should stop doing to improve the relationship.

The comments have been edited for brevity, based on repetition of similar comments, with the number in brackets indicating the number of similar comments. This question was not answered by all participants in the 2016 study. Many businesses could not come up with examples on the spot. Several businesses contacted Community Futures West Yellowhead after the initial interview to provide more feedback on these questions.

Relationship between the business community and the Municipality of Jasper:

What can the Municipality of Jasper *keep doing* to improve business in the community?

- Investing in our future (10)
- Keep lobbying for residents and businesses and a streamlined approach to business (10)
- Keep looking after the community (5)
- Keep listening to residents and businesses (4)
- Partnering with Hinton on the Highway 16 corridor (4)
- Keep trying (2)

What can the Municipality of Jasper *start doing* to improve business in the community?

- Lower commercial rent (15)
- Start being realistic about housing (making it a priority) (15)
- Start filling open store fronts, stay with it even if it is challenging (10)
- Increase the number / availability of storage facilities (6)
- Improve / add public art (5)
- Start fighting harder with Parks for business rights (5)
- Start partnering more with the region (Hinton, Yellowhead County) (5)
- Open more industrial land for parking / businesses (5)
- Push for a municipal airport expansion (5)
- Review zoning and permitting (4)
- Start improving signage for the community (4)
- Take a professional approach to local signage and inconsistencies in messaging (2)
- Pursue more local educational options (2)
- Limit the number of chain stores allowed in Jasper (2)

What can the Municipality of Jasper ***stop doing*** in relation to the business community?

- Stop increasing taxes (15)
- Stop hindering the development of Home Based Businesses (10)
- Stop letting chain businesses open in Jasper (6)
- Stop supporting the tour of Alberta (5)
- Stop ‘playing favorites’ with code enforcement (4)

Relationship between the business community and Parks Canada:

What can Parks Canada ***keep doing*** to improve business in the community?

- Keep investing in the back county (10)
- Keep up on infrastructure and cleanliness (7)
- Encouraging growth (2)

What can Parks Canada ***start doing*** to improve business in the community?

- Seamless communication (15)
- Open up a larger footprint for the community (10)
- Release more land for industrial purposes (7)
- Start working with the municipality on housing initiatives (7)
- Pave the airport and turn Jasper into an international destination (6)
- Review and modernize regulations and bylaws (5)
- Start streamlining processes and start working with the municipality (5)
- Ease restrictions and paperwork hoops (5)
- Start working on affordable house and staff housing solutions (2)

What can Parks Canada ***stop doing*** in relation to the business community?

- Too many levels to go through to get anything accomplished in a reasonable timeframe (8)
- Stop putting up road blocks for small businesses (6)
- Stop pushing parking restrictions (5)
- Stop inhibiting small business by giving out only big contracts (4)
- Remove ‘deadweight’ positions (4)
- Stop letting large businesses exploit our resources for money (3)
- Parks doesn’t want development unless it comes with millions of dollars in development (2)

Relationship between the business community and the Jasper Park Chamber of Commerce:

What can the Jasper Park Chamber of Commerce **keep doing** to improve business in the community?

- Focus on existing business growth (15)
- Keep advocating for small businesses (6)
- Encouraging development and investment in Jasper (5)
- Keep completing outreach personal visits and business walks (4)
- Keep sending out information weekly to members (3)

What can the Jasper Park Chamber of Commerce **start doing** to improve business in the community?

- Taking action for the benefit of the retail sector (15)
- Start including all businesses in the small business awards and ongoing promotions (8)
- Keep stats on tourism / park travellers/ business trends and make them available for businesses (6)
- Take a greater role in housing projects (6)
- Put more into the Hinton / Jasper corridor for the betterment of all businesses (5)
- The chamber should have stayed with tourism (4)

What can the Jasper Park Chamber of Commerce **stop doing** in relation to the business community?

- Stop making decisions without consulting the membership (16)
- Stop taking on large scale projects that pull attention away from the organisations goals (Canada Day, Tour of Alberta) (10)
- Stop siding with the municipality and parks without support of the business community (5)
- Stop bleeding businesses for donations (3)

Practicalities:

In order for a community to properly plan and budget for business resources, support or infrastructure direct input is needed. Having quality, primary information is key in planning a sustainable community. The Jasper Business Visitation Study uses important tools to collect information relevant to economic and business development and becomes a resource to move forward for formation of business regulations, policies, programs and resources.

This Jasper Business Visitation Study will support and foster the development and growth of the business community, which in turn provides a long term sustainable community foundation. Long term outcomes are a means of connecting businesses with resources and opportunities that will improve their long term competitive position, market networks and ultimately their profitability. The study demonstrates the importance of building, retailing and expanding a strong business community.

This completes the end of the 2016 / 2017 Jasper Business Visitation Study.

For more information on the Jasper Business Visitation Series please contact:

Community Futures West Yellowhead
221 Pembina Ave, Hinton Alberta
www.westyellowhead.albertacf.com

Appendix A:
2014 Jasper Business Visitation Survey

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)
- (b) Convention resort
- (c) Bed and breakfast
- (d) Hotel/motel
- (e) Condominium
- (f) Campground
- (g) Other **(specify)**

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	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	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

	A	B	C	D	E
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:

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:

Morgan Roberts
Business Visitation Coordinator
Community Futures West Yellowhead
221 Pembina Avenue, Hinton, AB T7V 2B3
T: 780-865-1224
W: westyellowhead.albertacf.com

Appendix B:

2016 Jasper Business Visitation Survey

2016 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: _____

1. How would you categorize the state of your business? **(Circle)**

- a) Growing
- b) Maintaining
- c) Declining
- d) Considering closing

Comments: _____

2. Over the last two years, did the following business factors increase, stay the same, or decline? **(Circle)**

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

a) If any of these business factors increased or decreased, what is the principal reason for the change?

3. Over the past two years, have you seen growth in the following areas of Jasper?

Please rate them from 1 to 5 with 1 being the least or no growth and 5 being the most growth.

a. Streamline of bylaws and regulations of the development approval process, licensing and inspections, Zoning and permitting between parks Canada and the Municipality of Jasper _____

b. Transparency of communication from the governing bodies in the community to the business community and residents _____

c. Housing procedures and policies _____

d. Creative use of commercial space for businesses to start up, expand and grow _____

e. commercial signage and related bylaws _____

Comments: _____

4. In terms of the business community relationship with the **Municipality of Jasper**, what can the town:

- a) Keep doing to improve business in the community
- b) Start doing to improve business in the community
- c) Stop doing in relation to the business community

5. In terms of the business community relationship with **Parks Canada**, what can Parks:

- a) Keep doing to improve business in the community
- b) Start doing to improve business in the community
- c) Stop doing in relation to the business community

6. In terms of the business community relationship with the **Chamber of Commerce**, what can the Chamber:

- a) Keep doing to improve business in the community
- b) Start doing to improve business in the community

c) Stop doing in relation to the business community