

Tourism Industry Business Retention and Expansion (TIBRE) Program

HINTON PROJECT

Research Findings Report

April 2020



Table of Contents

1. Methodology
 - a. Project Design 1-5
 - b. Survey Population and Data Collection 5

2. Survey Questions and Responses
 - a. Summary of the Findings 5-8
 - b. Survey Questions and Responses
 - i. Current Business Status 8-19

 - ii. Marketing Activities 20-37

 - iii. Operational Challenges and Barriers 38-51

 - iv. Staff and Training 52-68

 - v. Business Trends & Comparisons 69-79

 - vi. Expectations for 2020 79-96

 - vii. Current Business Climate 97-107

 - viii. Additional Comments 108-117

3. Next Steps 113

4. Appendix A: Letter to Business 114-115

5. Appendix B: TIBRE Survey 116-138

1. Methodology

a. Project Design

Community Futures West Yellowhead began discussions for a Tourism Industry Business Retention and Expansion Project or TIBRE project in Hinton Alberta in the summer of 2019. Hinton was selected as the second pilot test site because Hinton has an established tourism industry, there is room for the industry to grow, and has a strong local champion for the program. Using the TIBRE model as follows, a project plan was developed:

- Create a local implementation committee
- Develop questions (for interviews with business owner/operators)
- Identify local tourism businesses
- Conduct the interviews/enter responses into a tablet database
- Follow up with businesses individually as needed
- Analyze the results
- Report on the results
- Develop recommendations/actions
- Implement recommendations/actions

In September 2019, CFWY established a local project team consisting of representatives from:

- Alberta Labour and Immigration
- Alberta Culture and Tourism
- Hinton and District Chamber of Commerce
- Town of Hinton
- Alberta Environment and Parks
- Hinton and Region Economic Development Coalition and
- Discover Alberta Northern Rockies.

Training and strategic project planning with these stakeholders was conducted with the following goals established for the TIBRE report:

1. Firm/Business Visitation: To strategically visit and understand the current situation of the tourism businesses in Hinton using the TIBRE model for guidance and support;
2. Data Collection: To create a baseline of data using the TIBRE model
3. Follow up: To supply additional information or provide business coaching, training or financing assistance to businesses as required
4. Reporting: To create a final report with project data to provide to the project team, business community and interested stakeholders
5. Reflection: To work with the project team and TIBRE representatives after the final report to create a strategic action plan to support Hinton's growing tourism industry

Under the direction of CFWY and using the 2019 Town of Hinton Business Licensing List of 524 registered licensed businesses, 103 businesses were identified for the survey as follows:

- Accommodations - 29
- Food & Beverage - 30
- Recreation & Entertainment - 7
- Retail - 29
- Transportation - 6
- Travel Services - 2

Of these 103 businesses, 59 businesses agreed to complete the face to face interview scheduled for one on one meetings with CFWY Community Liaison, Jax Delisle.

TIBRE is based on a structured interview used to obtain information about local area businesses and their needs and includes follow up with business development specialists as needed. Interview questions were established and created by Alberta Culture and Tourism with the Government of Alberta.

Data and opinions were gathered from business owner/operators in an interview format by a contract interviewer. Individual business responses are confidential, and all of the information was aggregated for reporting back to businesses and community leaders.

It should be noted that CFWY did have additional interviews scheduled but due to COVID-19 health regulations in late March 2020, several interviews had to be scheduled. It should also be noted that this study gives a snapshot of tourism businesses prior to the economic and public health crisis that began in March 2020 due to the global COVID-19 pandemic.

b. Survey Population and Data Collection

Community Futures West Yellowhead reviewed the Town of Hinton's 2019 business licenses to identify tourism businesses to participate in the program. 108 tourism businesses were invited and 59 agreed to participate resulting in a 55 % response rate. Community Futures West Yellowhead was unable to increase the number of face-to-face interviews to increase the response rate due to COVID-19 public health restrictions.

CFWY contracted our Community Liaison to complete the interviews and Alberta Culture and Tourism prepared the training materials for the contractor and business owners with the following correspondence:

Partners completed 4 hours of training and orientation to the TIBRE program as well as interviewing techniques and best practices. Our Community Liaison contacted business owners and arranged a time and location for the interviews. Interviews were held between November 2019 and March 2020.

2. Survey Questions and Responses

a. Summary of the Findings

- Of the 59 businesses who participated in this survey,
 - 20% (12) were accommodation,
 - 25% (15) were retail,
 - 8% (5) were recreation/entertainment,
 - 36% (21) were food and beverage,
 - 2% (1) were travel services,
 - 2% (1) were transportation, and

- 7% (4) were other types of operations.
- The tourism industry in Hinton is relatively mature with
 - 41% (24) of the businesses surveyed in operation for more than 10 years;
 - 17% (10) in operation between 5 and 10 years;
 - 39% (23) in operation for between 1 and 4 years; and
 - 3% (2) in operation for less than 1 year.
- Participants attributed an average of 49% of their business to tourism and while some of the businesses were seasonal, the majority 97% (57) were open year round.
- These businesses also reported that an average of 39% (23) visitors are local/Albertan; 32% (19) are from other provinces and territories in Canada, 27% (16) are international and 2% (1) unknown.

Staff, Management and Training:

- Participating businesses have an average of 12 full-time and 7 part-time employees year round;
- Seasonal businesses have an average of 8 full-time and 2 part-time employees.
- The average bi-weekly payroll costs are \$15,963 in the winter and \$20,707 in the summer. Bi-weekly payroll costs for these tourism businesses are 30% higher, on average, in the summer than in the winter.

Business Performance in 2019

- Participants were asked about business performance in 2019 in three key areas: number of visitors, sales/revenue, and profits. They were asked if these areas increased, decreased or stayed the same compared to previous years.
- The majority of participants reported that revenues stayed the same, though their numbers of visitors was increasing (see survey results).
- Of those reporting an increase in visitors, more visitors were cited as the main factor in driving increased visitation which then in turn kept revenues the same.

- While the majority of the businesses reported an increase in visitation and maintaining of revenues in 2019, the majority of businesses also reported that they didn't hire any additional staff.

Expectations for Business in 2020

- Looking forward to 2020,
 - 36% (21) of the businesses expect the number of visitors to increase,
 - 40% (23) expect the number of visitors to stay the same,
 - 24% (14) expect the number of visitors and sales to decrease.
- Once again, the majority of those expecting higher visitors cited more visitors as the main driver for increased visitation and increased visitors.

Plans for the Future

- Participants were asked several questions in regard to their plans for the future. 33% (19) of businesses are considering expansion through renovations to existing facilities, new facilities or locations, new services or new product in 2020 or 2021.
- When asked to identify constraints to any type of expansion,
 - 47% (21) businesses said their businesses were at capacity and did not require expansion;
 - 24% (11) businesses said there was inadequate financial return on improvement/investment;
 - 49% (22) businesses cited the current economic climate;
 - 24% (11) businesses cited the increased costs;
 - 9% (4) businesses cited seasonality; and
 - 18% (8) said other – which included size of building (2), new business (1), tied to a lease (2), carbon tax increase (1), competition (1)
- The business picture is stable with most of the businesses surveyed
 - (55 or 95%) were not planning to move, close or sell in the next 2 years.

- The 3 (5%) that are considering moving, are considering moving within town.
- There are 2 (3%) businesses considering closing or selling in the next 2 years.

b. Survey Questions and Responses

i. Current Business Status

Questions 1-13 includes questions about nature of the business, products and services, number of years in operation and under current ownership, business registration, annual revenue, months in operation, and where their visitors come from.

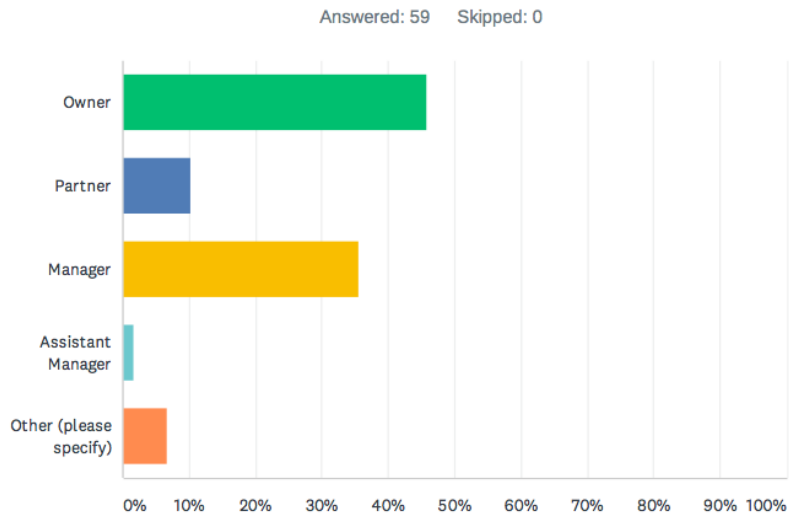
Summary of results related to current business status:

- When possible, the owner of the business was interviewed (48%)
- Businesses were surveyed from a wide range of sectors related to the tourism industry and most were considered retain (36%)
- Most businesses surveyed were long term businesses in Hinton over 5 years (57%)
- Current business owners have owned the business for 1 to 4 years (48%)
- Most businesses surveyed were corporations (76%)
- Businesses surveyed attributed 49% of their business to tourism
- Most businesses surveyed were open year round (97%)
- Seasonal businesses surveyed (3%) were open May to October
- Businesses surveyed were most likely to be open 7 days a week
- Most businesses are open “regular” business hours (ie between 9am and 5pm, 7 days a week)
- 57% of businesses considered their visitors to be local and lived within 1.5 hours of Hinton (this would include Jasper, Edson, Grande Cache, and Yellowhead County)
- Non local visitors are most likely to come from other parts of Alberta (39%)

Question 1 was internal information for coding and data entry purposes.

Question 2. What is your position in the company? (n=59)

Table 1: Position in Company



ANSWER CHOICES	RESPONSES	
Owner	45.76%	27
Partner	10.17%	6
Manager	35.59%	21
Assistant Manager	1.69%	1
Other (please specify)	6.78%	4
TOTAL		59

Other included:

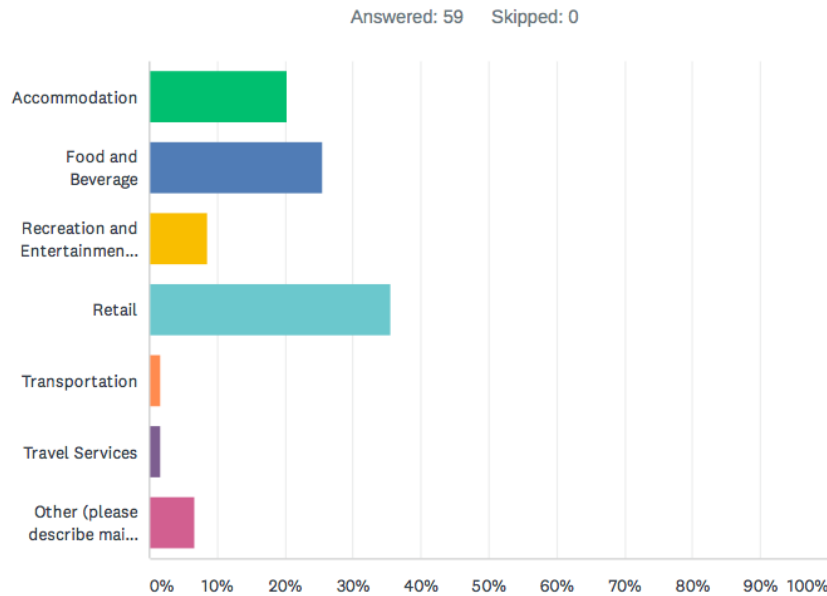
- key holder (1),
- facility coordinator (1),
- front desk (1), and
- employee (1)

When possible, CFYW interviewed the owner of the business (48%).

**Question 3. Which of the following best describes the nature of your business?
(n=59)**

Table 2: Nature of the Business

Q3 Which of the following best describes the nature of your business?



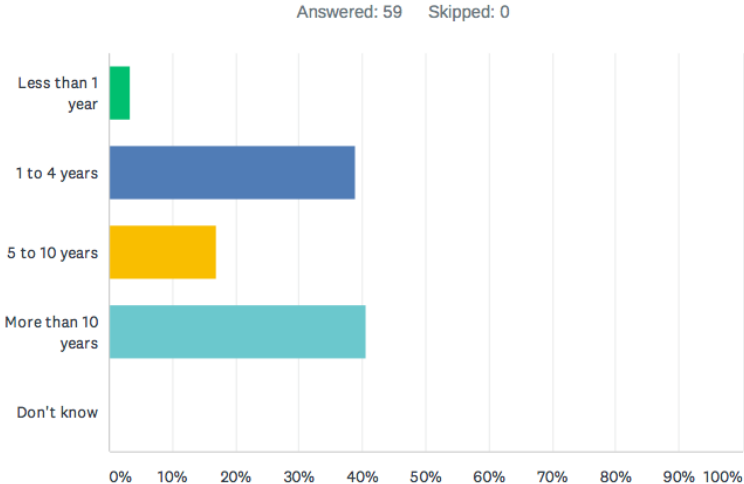
ANSWER CHOICES	RESPONSES	
Accommodation	20.34%	12
Food and Beverage	25.42%	15
Recreation and Entertainment (*includes Attractions)	8.47%	5
Retail	35.59%	21
Transportation	1.69%	1
Travel Services	1.69%	1
Other (please describe main products and services)	6.78%	4
TOTAL		59

Other included photography (2) and creative work (2).

CFWY attempted to have a broad range of tourism related businesses interviewed for TIBRE. Retail businesses were selected based on the type of product that they were selling and whether they had a larger number (over 40%) of customers that were from outside of Hinton.

Question 4. How long has the business been in operation? (n=59)

Table 3: Length of Business Operation

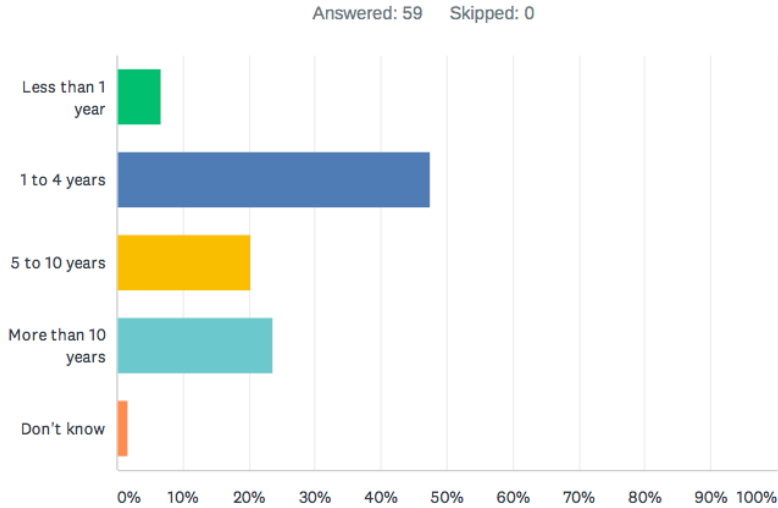


ANSWER CHOICES	RESPONSES	
Less than 1 year	3.39%	2
1 to 4 years	38.98%	23
5 to 10 years	16.95%	10
More than 10 years	40.68%	24
Don't know	0.00%	0
TOTAL		59

Businesses surveyed were mostly long term businesses and were mostly in business more than 5 years (n=34 or 57%).

Question 5. How long have the current owners owned the business? (n=59)

Table 4: Timeline of Current Owners

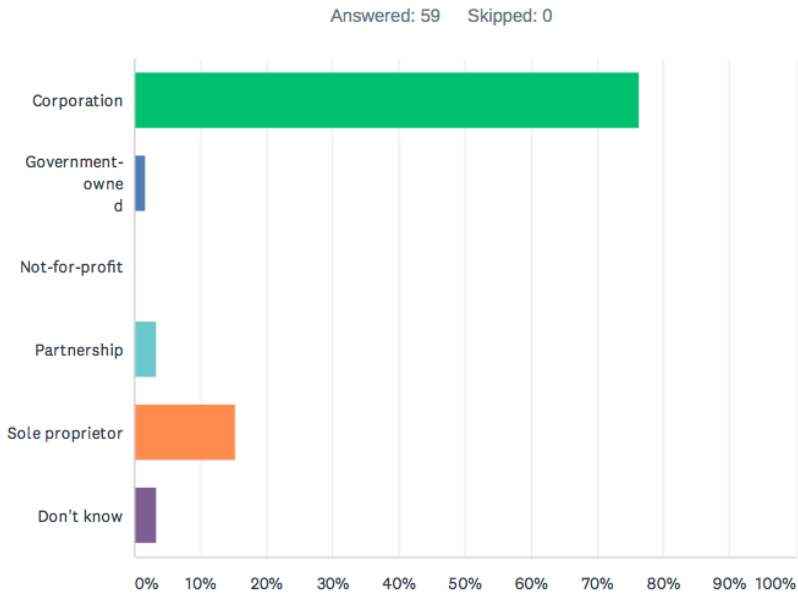


ANSWER CHOICES	RESPONSES	
Less than 1 year	6.78%	4
1 to 4 years	47.46%	28
5 to 10 years	20.34%	12
More than 10 years	23.73%	14
Don't know	1.69%	1
TOTAL		59

Most were current business owners for 1 to 4 years (48%) of the surveyed businesses.

Question 6. How is the business registered? (n=59)

Table 5: Business Registration

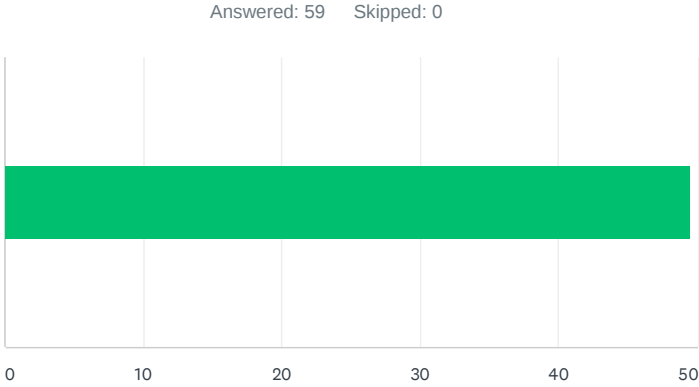


ANSWER CHOICES	RESPONSES	
Corporation	76.27%	45
Government-owned	1.69%	1
Not-for-profit	0.00%	0
Partnership	3.39%	2
Sole proprietor	15.25%	9
Don't know	3.39%	2
TOTAL		59

Most surveyed businesses were corporations (76%)

Question 7. Approximately what % of your business is attributable to tourism? (n=59)

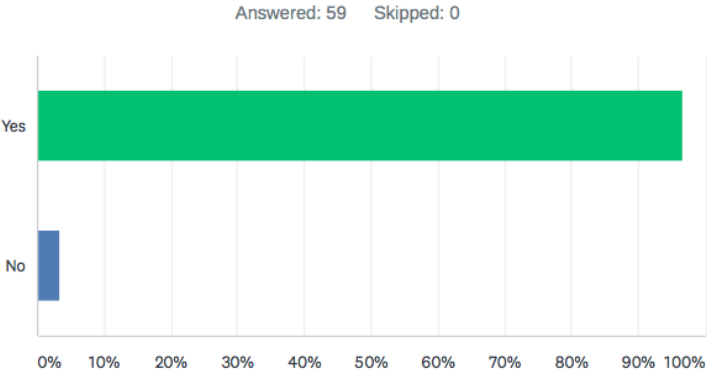
Table 6: Percentage of Tourism



On average, businesses attributed 49% of their business to tourism.

**Question 8. Are you open for business all year round, i.e., 12 months a year?
(n=59)**

Table 7: Open Year Round

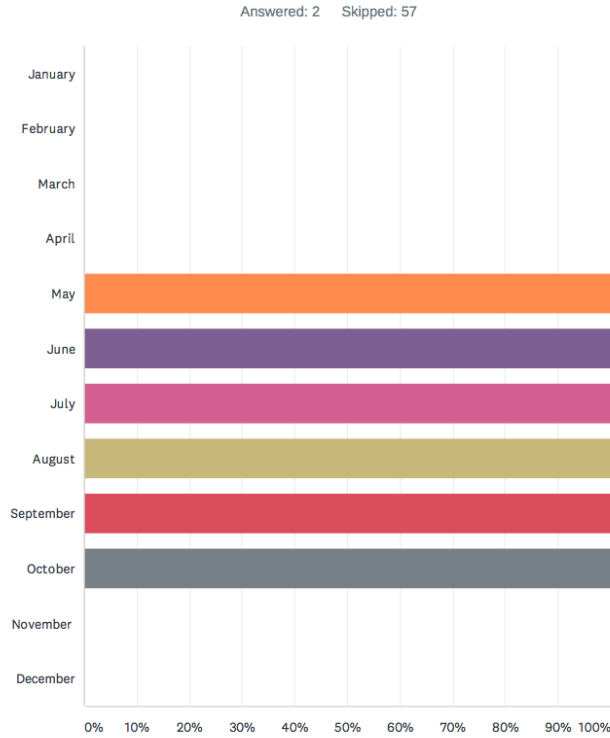


ANSWER CHOICES	RESPONSES	
Yes	96.61%	57
No	3.39%	2
TOTAL		59

57 surveyed businesses were open year round (97%)

Question 9. If NO, what months of the year are you open for business? (n=2)

Table 8: Months of Operation for Seasonal Businesses

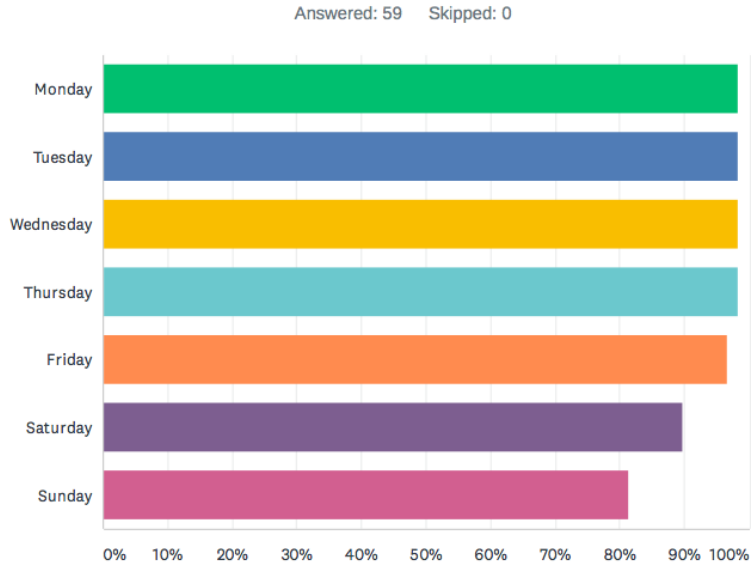


ANSWER CHOICES	RESPONSES	
January	0.00%	0
February	0.00%	0
March	0.00%	0
April	0.00%	0
May	100.00%	2
June	100.00%	2
July	100.00%	2
August	100.00%	2
September	100.00%	2
October	100.00%	2
November	0.00%	0
December	0.00%	0
Total Respondents: 2		

Of the two businesses that were seasonal, they were open from May-October.

Question 10. What days of the week are you open for business? (n=59)

Table 9: Days of Week Open



ANSWER CHOICES	RESPONSES	
Monday	98.31%	58
Tuesday	98.31%	58
Wednesday	98.31%	58
Thursday	98.31%	58
Friday	96.61%	57
Saturday	89.83%	53
Sunday	81.36%	48
Total Respondents: 59		

98% of businesses were open Monday to Thursday, 96% open on Fridays and less businesses were open on Saturday (90%) and Sunday (81%).

Question 11. What are your hours of operation each day? Enter opening and closing time for each day, for example, 9am to 9pm or leave blank for days you are closed. (n=59)

25% of businesses were open 24/7

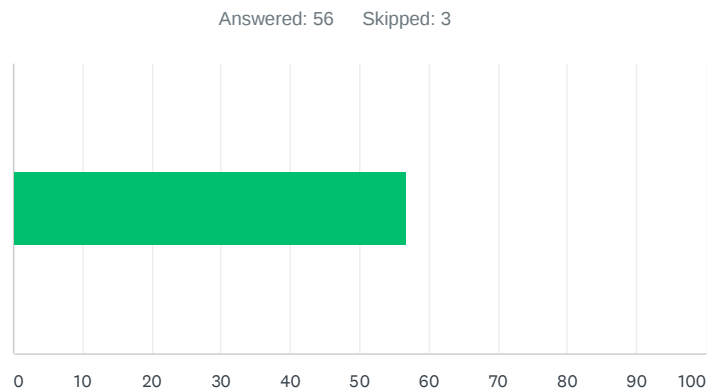
76% of businesses were open in the evenings

92% of businesses were open on weekends

Most businesses are open “regular” business hours (ie between 9am and 5pm 7 days a week)

Question 12. Approximately how many of your visitors are local, that is, live within a travel distance of 1.5 hours? Please express as a percentage. (n=56)

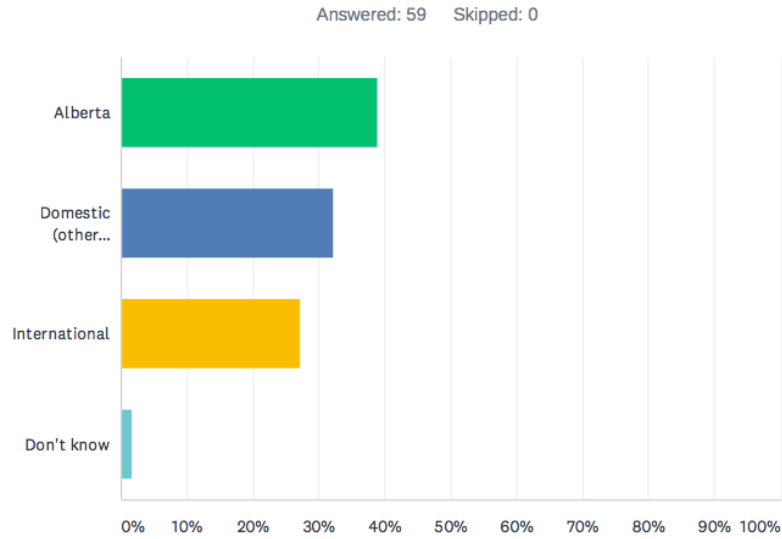
Table 11: percentage of Local Visitors



Businesses stated an average of 57% of their visitors are local

Question 13. Where do the majority of your non-local visitors come from? (Those who live more than a 1.5 hours drive time away). (n=59)

Table 11: Non-Local Visitors



ANSWER CHOICES	RESPONSES	
Alberta	38.98%	23
Domestic (other provinces/territories in Canada)	32.20%	19
International	27.12%	16
Don't know	1.69%	1
TOTAL		59

Of those surveyed, the majority of non-local visitors come from Alberta (39%). Other provinces (32%) and International (27%) were less.

ii. Marketing Activities

Questions 14 to 27 includes questions about the marketing of the business, products and services. Identifies customers needs, and competitive advantage.

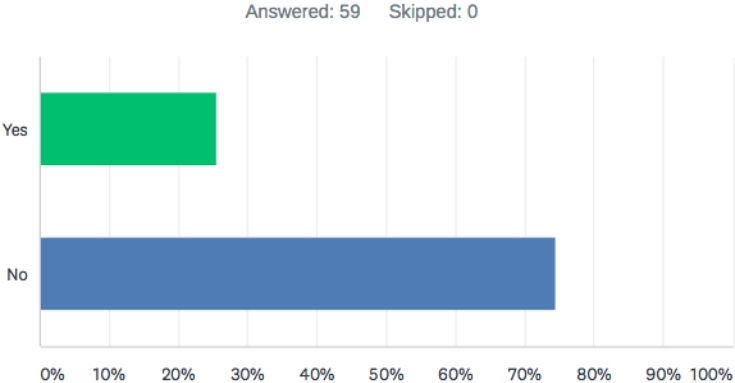
Summary of the results related to marketing activities:

- Most businesses surveyed do not collect postal codes (75%)
- Most businesses surveyed were not interested in PRIZM (78%)
- 61% of businesses surveyed had a marketing plan
- Most businesses surveyed did not receive tourism industry information (78%)
- Customers needs were mostly identified through:
 - Informal comments/feedback (90%)
 - Complaints (57%)
 - Customer surveys (26%)
 - Comment cards (24%)
 - Marketing publications (17%)
 - Sales calls (16%)
 - Trade publications (14%)
 - Focus groups (2%)
- 64% of businesses surveyed conducted a regular competitive analysis
- When asked for the competitive advantage of their business, business stated:
 - Customer Service (83%)
 - Location (68%)
 - Branding (63%)
 - Efficiency (58%)

- Product variety (59%)
- Most businesses surveyed need to maintain their business offerings (59%) opposed to expanding (37%) or decreasing them (2%)
- 72% of businesses surveyed have a brand strategy
- Products and/or service pricing is set:
 - At market (47%)
 - Margin (33%)
 - Below market (12%)
 - Above market (9%)
- Most businesses did not have a wholesale price (52%)
- Promotion of products is done through:
 - Word of mouth (92%)
 - Social media (88%)
 - Website (81%)
 - Business Cards (80%)
 - Email (54%)
 - Flyers (44%)
 - Sponsorship (44%)
 - Newspaper/community ads (42%)
 - Radio ads (24%)
 - Trade shows (17%)
- The majority of businesses (53%) do not attend marketing/trade show events
- Most businesses surveyed do not work with receptive tour operators (66%)

Question 14. Do you collect postal codes from your visitors? (n=59)

Table 12: Postal Code Collection

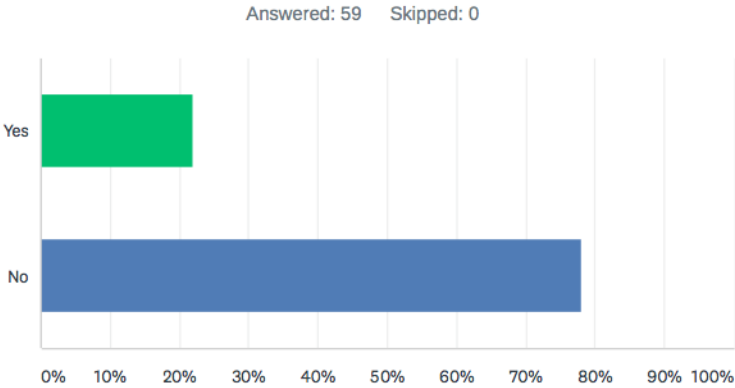


ANSWER CHOICES	RESPONSES	
Yes	25.42%	15
No	74.58%	44
TOTAL		59

Most business surveyed (75%) do not collect postal codes from their visitors.

Question 15. PRIZM is a free program, offered by Alberta Economic Development, Trade and Tourism, which takes postal codes from your business and groups them into visitor types. This can help your business further understand your visitors. Would you be interested in obtaining more information about PRIZM? (n=59)

Table 13: PRIZM



ANSWER CHOICES	RESPONSES	
Yes	22.03%	13
No	77.97%	46
TOTAL		59

Most business surveyed (78%) did not want to obtain more information about PRIZM

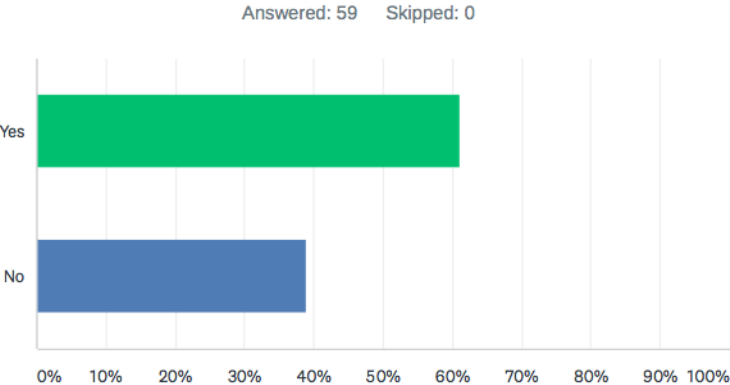
PRIZM reports help improve tourism products and services, and inform business and marketing plans. Find out:

- who your best customers are
- demographics, psychographics and lifestyle characteristics
- how to locate customers, communicate with them and create targeted messaging for them

<https://www.alberta.ca/alberta-tourism-industry-research.aspx#toc-2>

Question 16. A marketing plan details the necessary actions to achieve one or more marketing objectives. Does your business have a current marketing plan? (n=59)

Table 14: Marketing Plan

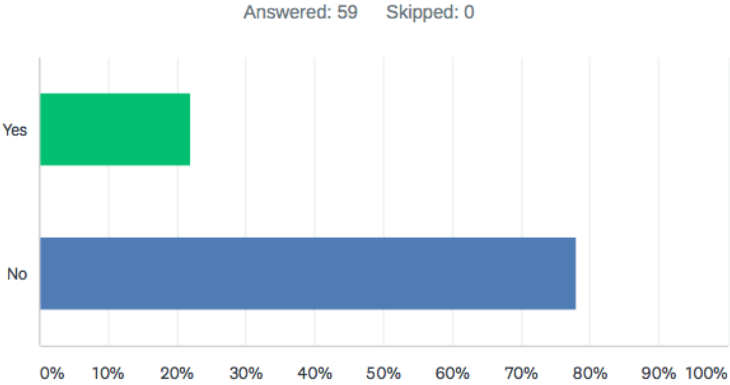


ANSWER CHOICES	RESPONSES	
Yes	61.02%	36
No	38.98%	23
TOTAL		59

61% of businesses surveyed have a marketing plan.

Question 17. Do you receive market information, e.g., Alberta Market Monitor and/or trend information, about your industry? (n=59)

Table 15: Market Information

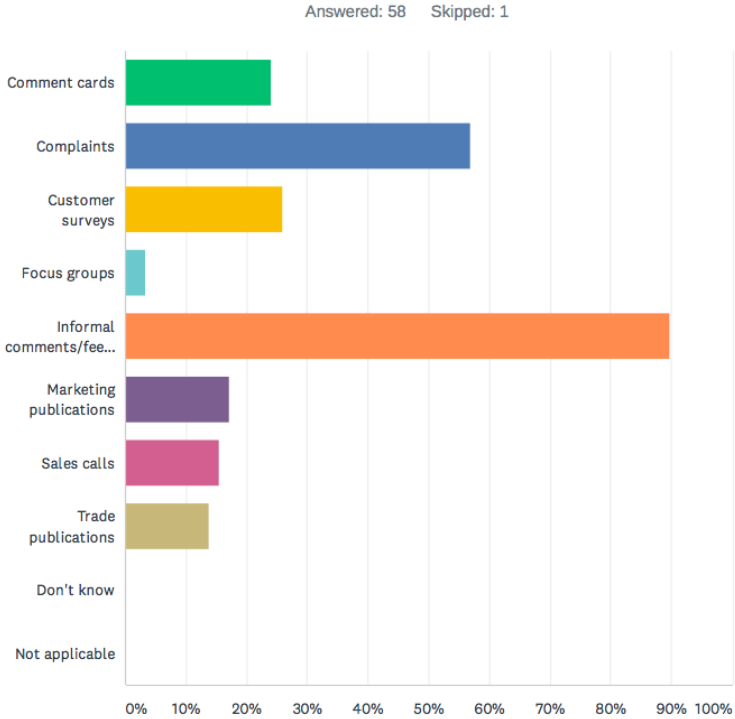


ANSWER CHOICES	RESPONSES	
Yes	22.03%	13
No	77.97%	46
TOTAL		59

Most businesses (78%) do not receive information about the tourism industry.

Question 18. How do you identify your customers' needs? (n=58)

Table 16: Customers' Needs

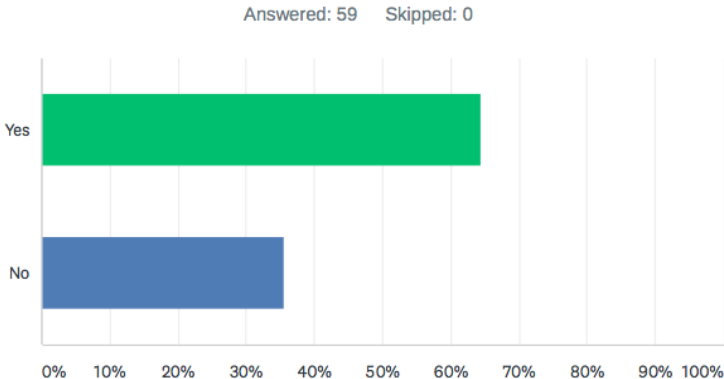


ANSWER CHOICES	RESPONSES	
Comment cards	24.14%	14
Complaints	56.90%	33
Customer surveys	25.86%	15
Focus groups	3.45%	2
Informal comments/feedback	89.66%	52
Marketing publications	17.24%	10
Sales calls	15.52%	9
Trade publications	13.79%	8
Don't know	0.00%	0
Not applicable	0.00%	0
Total Respondents: 58		

Most businesses surveyed (90%) identify their customers' needs through information comments and feedback. Complaints (57%) was the second most comment way to identify customers' needs.

Question 19. Competitive analysis is an assessment of the strengths and weaknesses of current and potential competitors. Do you conduct a regular competitive analysis? (n=59)

Table 17: Competitive analysis

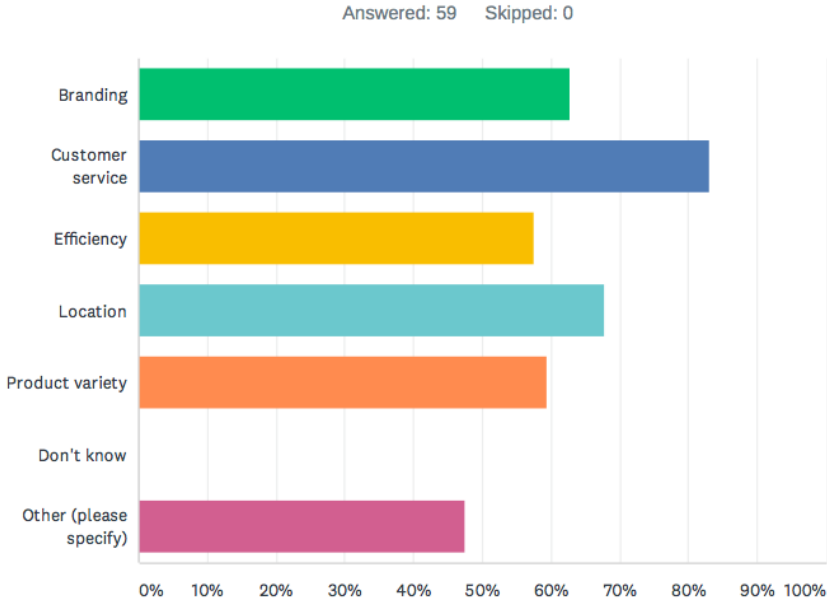


ANSWER CHOICES	RESPONSES	
Yes	64.41%	38
No	35.59%	21
TOTAL		59

The majority of businesses surveyed (64%) conducted a regular competitive analysis.

Question 20. Competitive advantage is your strengths relative to your competition. What is the competitive advantage of your business? (n=59)

Table 18: Competitive Advantage



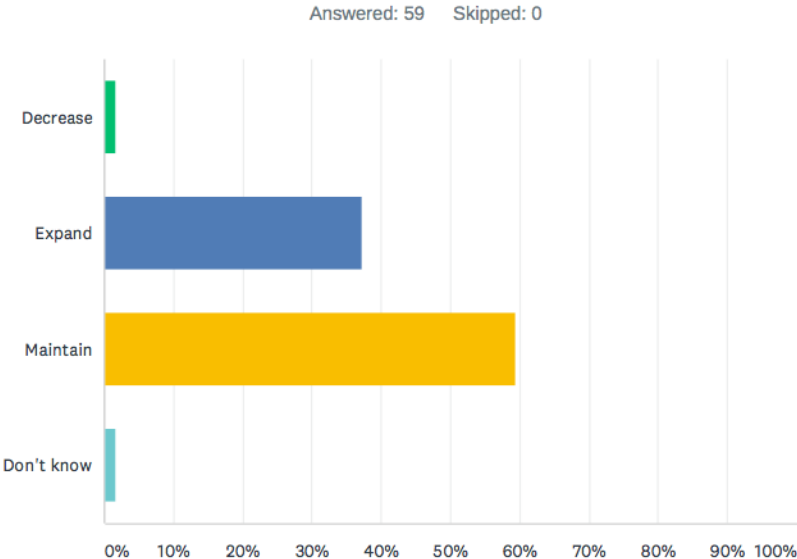
ANSWER CHOICES	RESPONSES	
Branding	62.71%	37
Customer service	83.05%	49
Efficiency	57.63%	34
Location	67.80%	40
Product variety	59.32%	35
Don't know	0.00%	0
Other (please specify)	47.46%	28
Total Respondents: 59		

Other included: Service Levels, Locally, Contribution to Community (1), Store Pet (2), Price Match (1) , Cleanliness (1), Competitive Rates (1), Unique (4), Length of time in community (1), National Marketing (2), We offer a full breakfast - which makes a huge difference (1), Price (2) We're more fun (1), High reviews online (1) Women Focused Business (1) No competition in industry (1) Speed - we are really quick at what we do - zero wait time. (1) A staple in the community (1) Immediate sales (1) Nimble in a changing industry, and can make quick decisions (1) Basically the only one in the area (1) Marketing (1) Competitive Edge in Niche Market (1) Local, fresh, and from scratch (1)

Customer service (83%) was identified as the most common competitive advantage of businesses surveyed.

Question 21. Do you need to expand, decrease, or maintain your business offerings? (n=59)

Table 19: Business Offerings

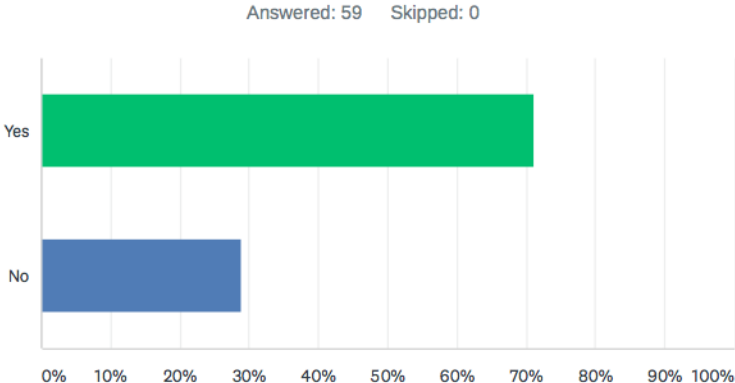


ANSWER CHOICES	RESPONSES
Decrease	1.69% 1
Expand	37.29% 22
Maintain	59.32% 35
Don't know	1.69% 1
TOTAL	59

Most businesses surveyed want to maintain (59%) their current business offerings.

Question 22. A brand strategy creates a solid brand identity for your company which will differentiate you from the competition. Do you have a brand strategy? (n=59)

Table 20: Brand Strategy

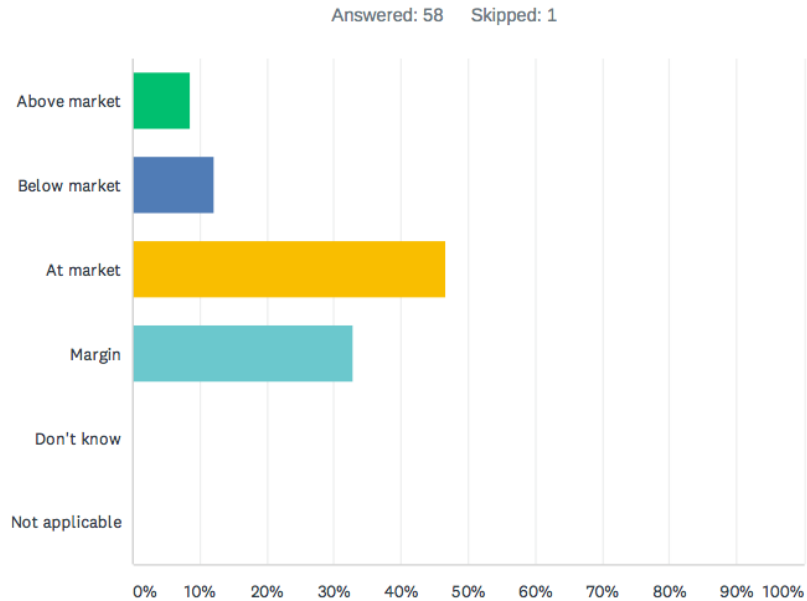


ANSWER CHOICES	RESPONSES	
Yes	71.19%	42
No	28.81%	17
TOTAL		59

Most businesses surveyed (72%) have a brand strategy.

Question 23. How do you set the price for your products and/or services? (n=58)

Table 21: Setting the Price for Products and/or Services

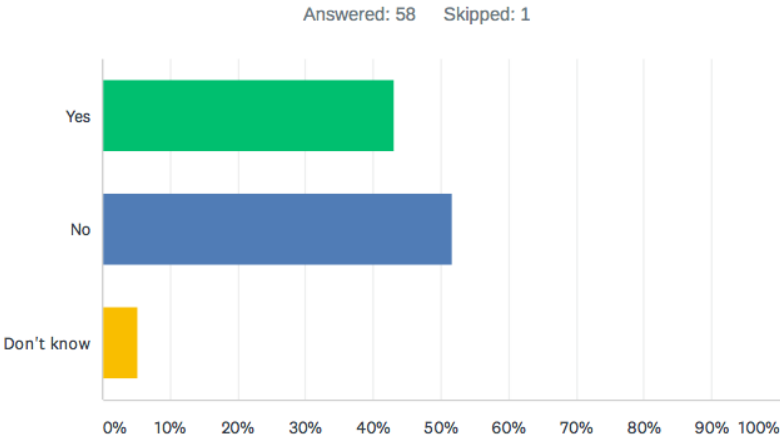


ANSWER CHOICES	RESPONSES	
Above market	8.62%	5
Below market	12.07%	7
At market	46.55%	27
Margin	32.76%	19
Don't know	0.00%	0
Not applicable	0.00%	0
TOTAL		58

The majority of businesses surveyed stated that they set their prices based on market (47%) or by a margin of profit (33%).

Question 24. Do you have a wholesale price? (n=58)

Table 22: Wholesale Price

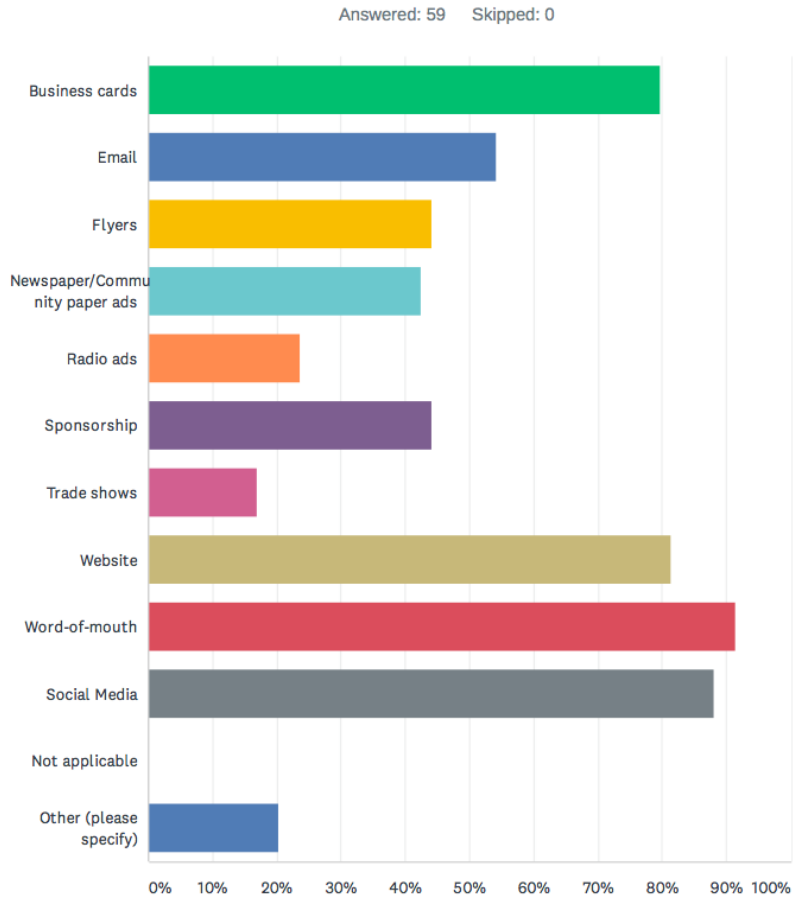


ANSWER CHOICES	RESPONSES	
Yes	43.10%	25
No	51.72%	30
Don't know	5.17%	3
TOTAL		58

Most businesses surveyed (52%) did not have a wholesale price.

Question 25. How do you promote your products/services? (n=59)

Table 23: Products and Services



ANSWER CHOICES	RESPONSES	
Business cards	79.66%	47
Email	54.24%	32
Flyers	44.07%	26
Newspaper/Community paper ads	42.37%	25
Radio ads	23.73%	14
Sponsorship	44.07%	26
Trade shows	16.95%	10
Website	81.36%	48
Word-of-mouth	91.53%	54
Social Media	88.14%	52
Not applicable	0.00%	0
Other (please specify)	20.34%	12
Total Respondents: 59		

Other included: Franchise Marketing (3), Loyalty Cards (1), Flat Sheet (2), Reviews - On TripAdvisor (1), Fan Club (1), Brand Swag (1), In house events, partnerships (1), External Booking Website (1) Radio show (non purchased) (1) , Car Shows (1), Brochures (1), Chamber of Commerce (1), Networking (1)

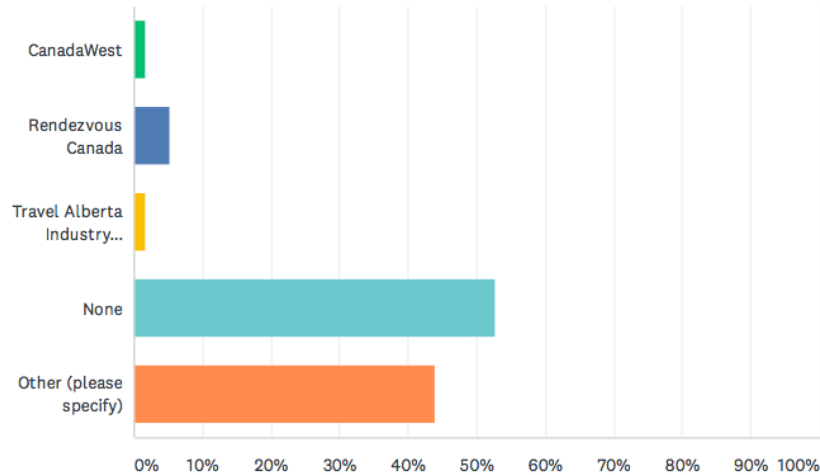
Of the Hinton businesses surveyed, word of mouth (92%) and social media (88%) were the most common ways to promote products and services. Business cards (79%) and websites (81%) were also common.

**Question 26. Which industry marketing/trade show events do you attend?
(n=57)**

Table 24: Trade Shows

Q26 Which industry marketing/trade show events do you attend?

Answered: 57 Skipped: 2



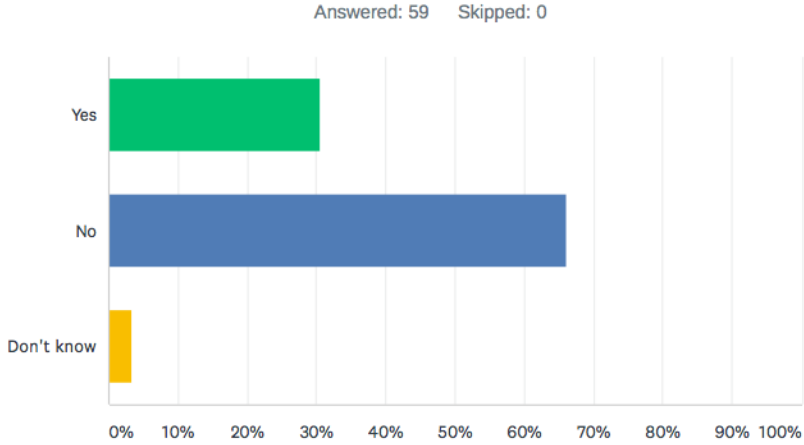
ANSWER CHOICES	RESPONSES
CanadaWest	1.75% 1
Rendezvous Canada	5.26% 3
Travel Alberta Industry Conference	1.75% 1
None	52.63% 30
Other (please specify)	43.86% 25
Total Respondents: 57	

Other (44 %) included industry specific conferences such as Sysco (3), Saputo (1), Travel Alberta (2), Local Trade Shows (1), Franchise Related (3) Industry Specific (15)

Most businesses surveyed (53%) did not attend industry marketing and/or trade show events.

Question 27. A receptive tour operator is a local tour company that specializes in local tourism experiences and manages products and services for incoming visitors booked through international tour operators. Do you work with receptive tour operators? (n=59)

Table 25: Receptive Tour Operators



ANSWER CHOICES	RESPONSES	
Yes	30.51%	18
No	66.10%	39
Don't know	3.39%	2
TOTAL		59

66% of businesses surveyed did not work with receptive tour operators.

iii. Operational Challenges and Barriers

Questions 28 to 36 includes questions about the Operational Challenges and Barriers of the business. Identifies how businesses promote their projects and services, areas that major challenges arise, limitations within current facility, and location barriers.

Summary of operational challenges and barriers:

- Businesses were surveyed on their operational challenges as follows:
 - Marketing (35%)
 - Overtime (29%)
 - Inventory management (29%)
 - Website development (25%)
 - Purchasing (20%)
 - Technological improvements (20%)
 - Computer software (18%)
 - Equipment inefficiencies (18%)
 - Research/development (16%)
 - Electronic commerce (16%)
 - Energy use (16%)
 - Franchise issues (16%)
 - Production (6%)
 - Branch sales office (6%)
- Most businesses surveyed leased their facility (54%) and of those, only 1 business anticipated problems renewing their lease.

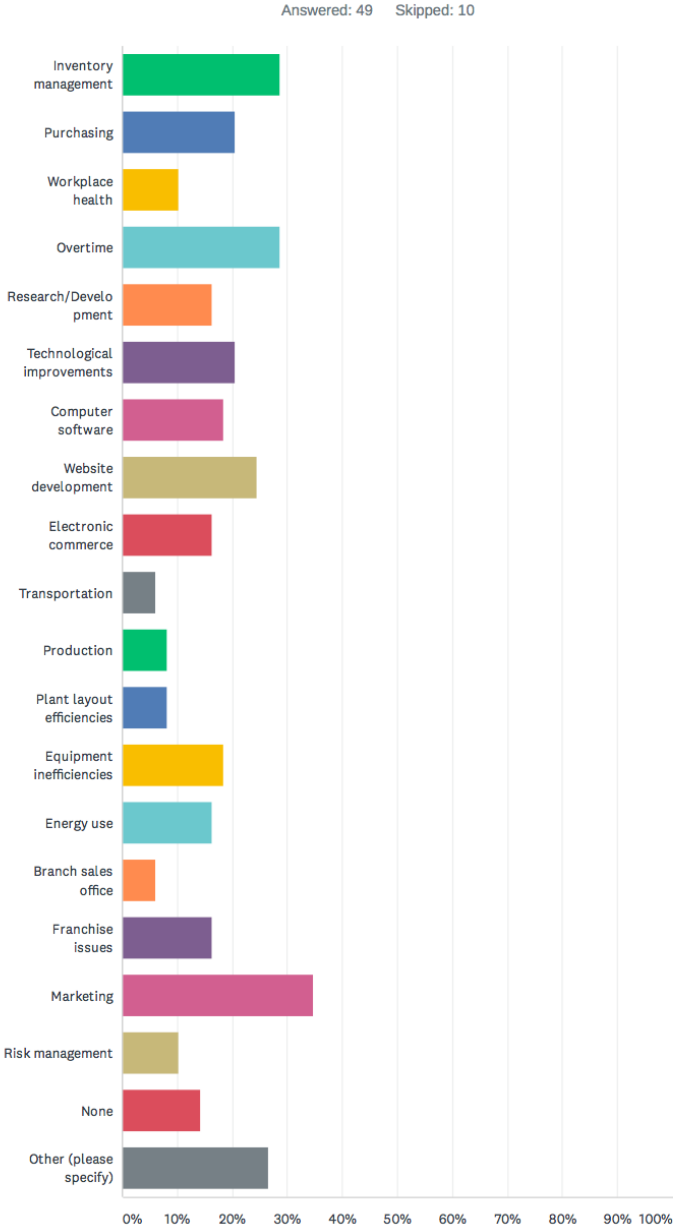
- Limitations on current business facility included:
 - Size (56%)
 - Building condition (42%)
 - Taxation (29%)
 - Geographic location (23%)
 - Parking (21%)
 - Energy consumption (15%)
 - Inadequate utilities (13%)
 - Inadequate services/amenities (11%)
 - Inadequate land for development (4%)

- 44 businesses stated they were experiencing location issues or barriers that impact productivity and/or competitiveness due to:
 - Signage (48%)
 - Promotion of the municipality as a tourism destination (34%)
 - Property taxation (20%)
 - Road quality or access (14%)
 - Access to suppliers (11%)
 - Quality of life (9%)
 - Municipal permits (7%)
 - Water/sewer capacity (7%)
 - Transportation costs (7%)
 - Availability of warehousing (7%)
 - Waste disposal (7%)

- Zoning regulations (5%)
- 23% of businesses surveyed do not use financial reports to assist in making business decisions. Those who do stated they use:
 - Cash flow (70%)
 - Income statements (70%)
 - Balance sheets (65%)
- 72% of the businesses surveyed conduct regular financial planning for their businesses and 67% receive professional financial advice.
- 31 businesses stated that they face specific challenges to the following:
 - Managing cash flow (58%)
 - Liquidity (29%)
 - Collecting receivables (23%)
 - Determining working capital position (16%)
 - Securing short term line of credit (16%)
 - Securing long term line of credit (16%)

Question 28. Identify the areas you currently face major operational challenges in from the list below: (n=49)

Table 26: Operational Challenges



ANSWER CHOICES	RESPONSES	
Inventory management	28.57%	14
Purchasing	20.41%	10
Workplace health	10.20%	5
Overtime	28.57%	14
Research/Development	16.33%	8
Technological improvements	20.41%	10
Computer software	18.37%	9
Website development	24.49%	12
Electronic commerce	16.33%	8
Transportation	6.12%	3
Production	8.16%	4
Plant layout efficiencies	8.16%	4
Equipment inefficiencies	18.37%	9
Energy use	16.33%	8
Branch sales office	6.12%	3
Franchise issues	16.33%	8
Marketing	34.69%	17
Risk management	10.20%	5
None	14.29%	7
Other (please specify)	26.53%	13
Total Respondents: 49		

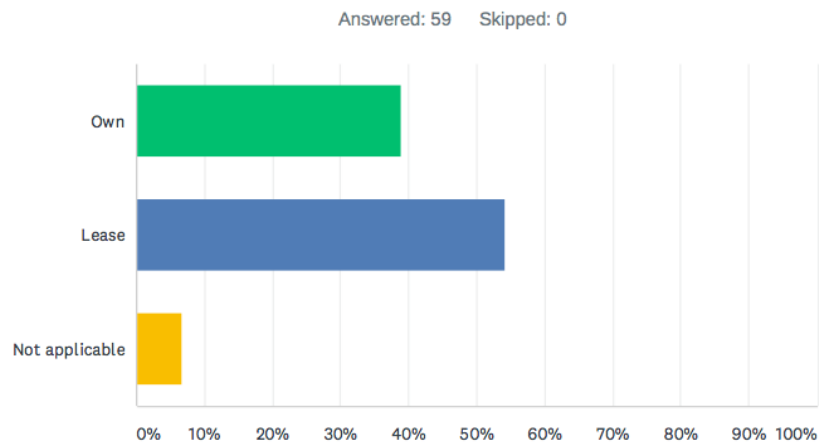
The major operational challenges for the businesses surveyed were:

- Marketing (35%)
- Overtime (29%)
- Inventory Management (29%)
- Website Development (25%)
- Purchasing (20%)
- Technological Improvements (20%)

Other included Staffing Issues (4), Labour Supply (1), Being able to reach the specific audience that requires this type of service. Essentially people need to know who I am before they come to the destination (1), Work life balance (1), Time Management (1), Property Taxes (1), Issues with local Bylaw Services (1), Cash Flow (1), I'm not a traditional business owner (1), Communication (1)

Question 29. Does your business own or lease the facility? (n=59)

Table 27: Own or Lease

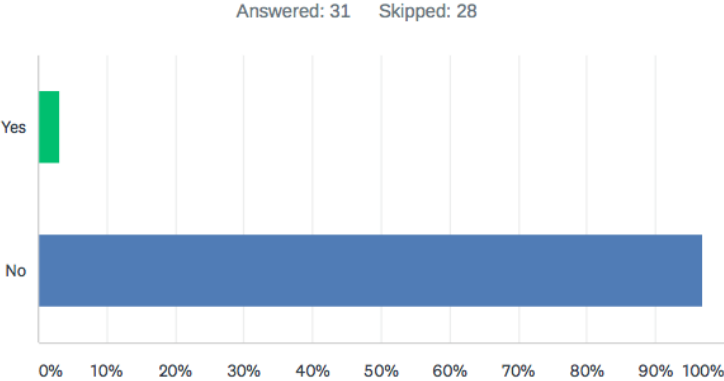


ANSWER CHOICES	RESPONSES	
Own	38.98%	23
Lease	54.24%	32
Not applicable	6.78%	4
TOTAL		59

Most businesses surveyed lease their facility (54%)

Question 30. Do you anticipate any problems renewing the lease? (n=31)

Table 28: Renewing the Lease

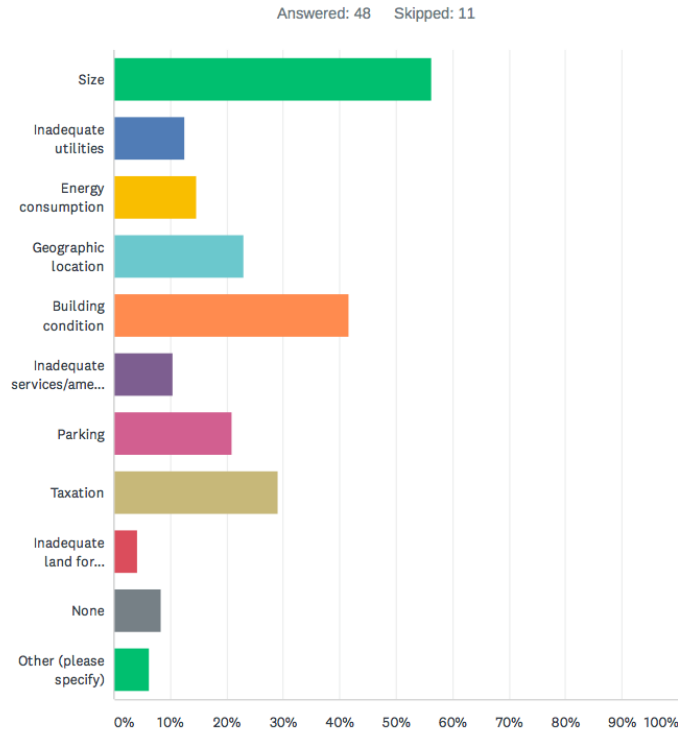


ANSWER CHOICES	RESPONSES	
Yes	3.23%	1
No	96.77%	30
TOTAL		31

Of the 31 businesses who lease their own facility, only 3% or 1 business anticipated problems when renewing their lease.

Question 31. Which, if any, limitations exist with your current facility? (n=48)

Table 29: Facility Limitations



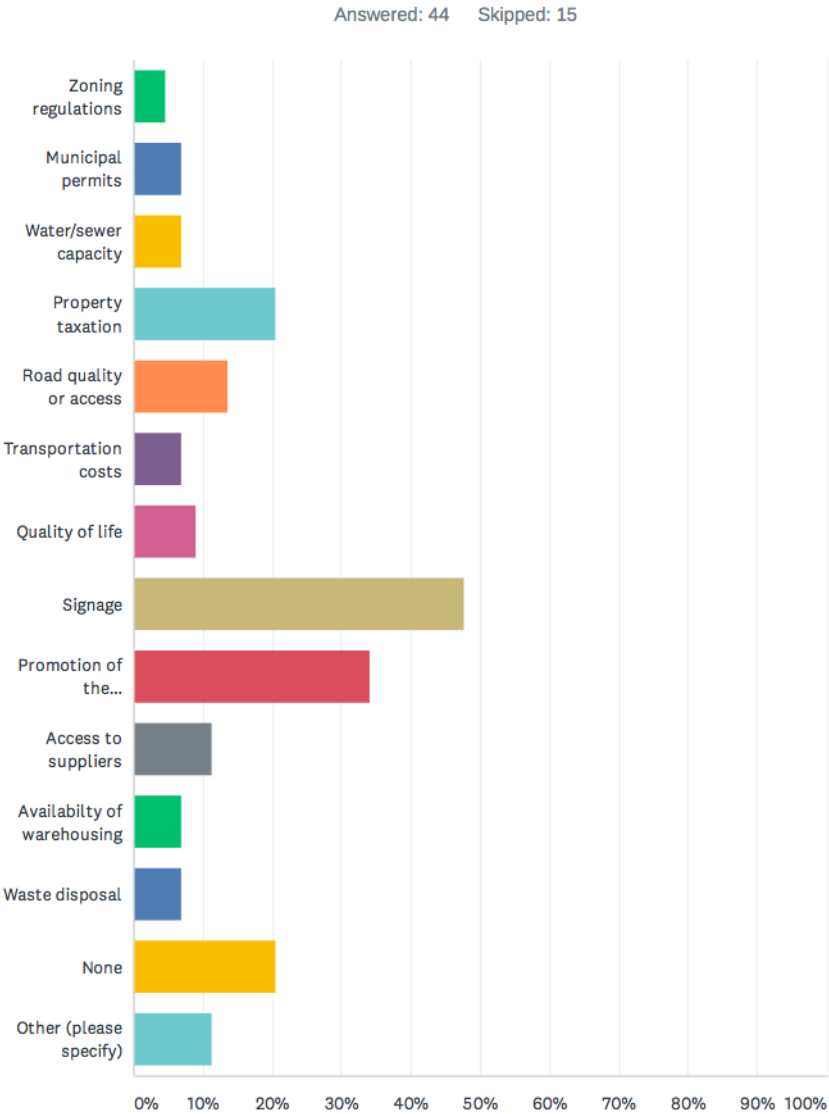
ANSWER CHOICES	RESPONSES
Size	56.25% 27
Inadequate utilities	12.50% 6
Energy consumption	14.58% 7
Geographic location	22.92% 11
Building condition	41.67% 20
Inadequate services/amenities	10.42% 5
Parking	20.83% 10
Taxation	29.17% 14
Inadequate land for development	4.17% 2
None	8.33% 4
Other (please specify)	6.25% 3
Total Respondents: 48	

Other included: Store is too small but it would be difficult to move (1), No air conditioning (1), Too big, and too costly to run, location is tough (1)

The most common response for those that stated they had facility issues (n=48) was size (56%) and building condition (42%).

Question 32. Is your business experiencing any location issues or barriers that impact productivity and/or competitiveness? (n=44)

Table 30: Location Issues or Barriers



ANSWER CHOICES	RESPONSES	
Zoning regulations	4.55%	2
Municipal permits	6.82%	3
Water/sewer capacity	6.82%	3
Property taxation	20.45%	9
Road quality or access	13.64%	6
Transportation costs	6.82%	3
Quality of life	9.09%	4
Signage	47.73%	21
Promotion of the municipality as a tourism destination	34.09%	15
Access to suppliers	11.36%	5
Availability of warehousing	6.82%	3
Waste disposal	6.82%	3
None	20.45%	9
Other (please specify)	11.36%	5
Total Respondents: 44		

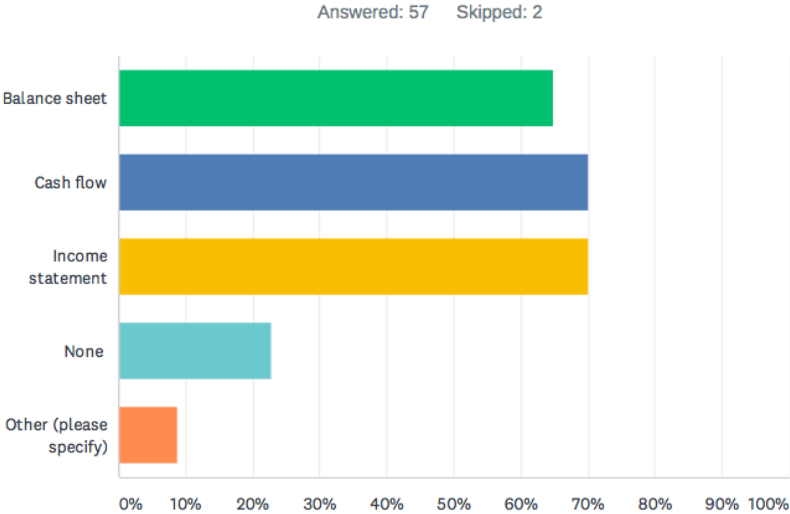
Other included: Valley is not advertised well - not much on highway (1), Hill/Valley is very disconnected (1), Need to look into other towns and see what they are doing - we could be done so much quicker. We do not recycle enough as a community. Should be the town's responsibility, not on a business front. We go through so much cardboard, it seems like such a waste not to recycle more on a business front. The prices locally are really inflated in town - double what you pay in the city. (1) Snow removal is really slow in our section of town - it's difficult in the winter months. (1) Rent is very high for business (1)

44 businesses stated that they had location issues and/ or barriers that impacted productivity and/ or competitiveness. The top three reasons were:

- Signage (48%)
- Promotion of the municipality as a tourism destination (34%)
- Property taxation (20%)

Question 33. Which of the following financial reports do you use to assist in making business decisions? Check all that apply. (n=57)

Table 31: Financial Reports



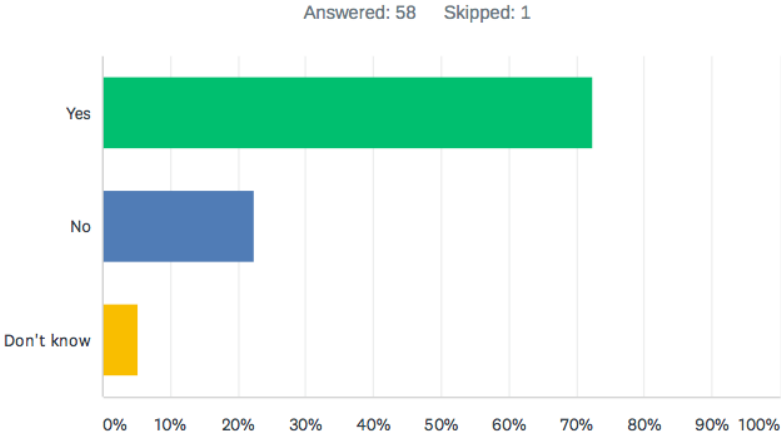
ANSWER CHOICES	RESPONSES	
Balance sheet	64.91%	37
Cash flow	70.18%	40
Income statement	70.18%	40
None	22.81%	13
Other (please specify)	8.77%	5
Total Respondents: 57		

Other included: In house documents (2), Inventory reports (1), Account software reports (1), Synoptic Journal (1)

Balance sheets (65%), cash flow (70%) and income statements (70%) were used frequently with the businesses surveyed.

**Question 34. Do you conduct regular financial planning for your business?
(n=58)**

Table 32: Financial Planning

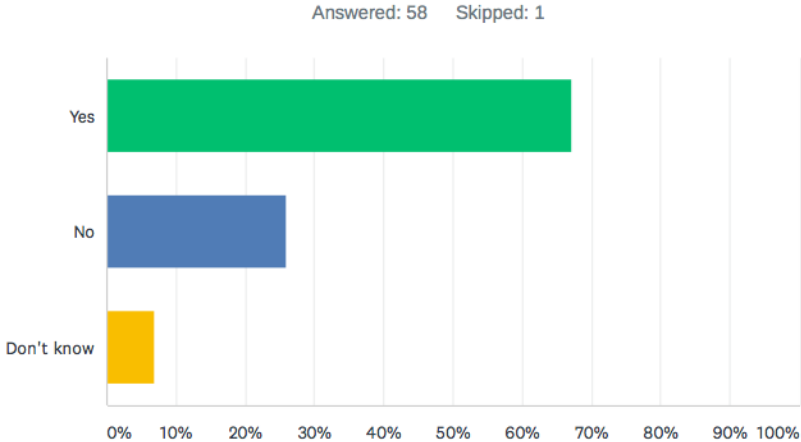


ANSWER CHOICES	RESPONSES	
Yes	72.41%	42
No	22.41%	13
Don't know	5.17%	3
TOTAL		58

72% of the businesses surveyed conduct regular financial planning for their businesses.

Question 35. Do you receive professional financial advice regarding your business? (n=58)

Table 33: Professional Financial Advice

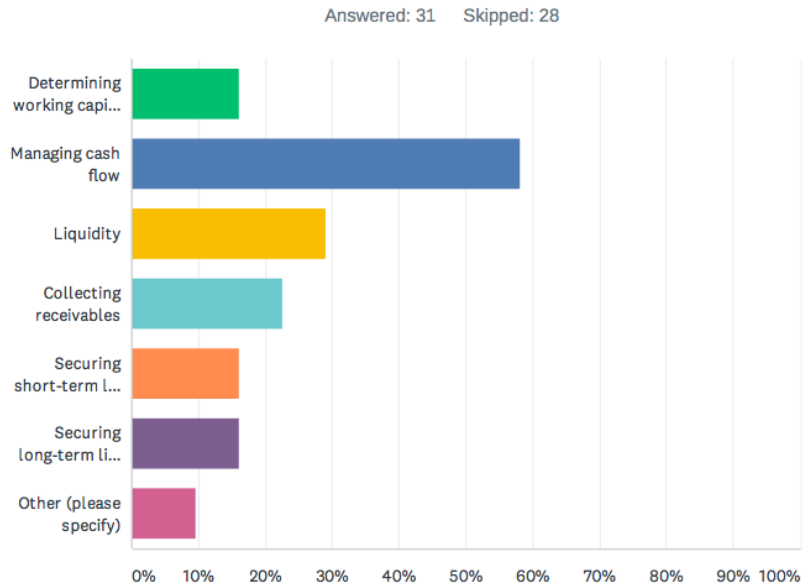


ANSWER CHOICES	RESPONSES	
Yes	67.24%	39
No	25.86%	15
Don't know	6.90%	4
TOTAL		58

67% of businesses surveyed receive professional financial advice regarding their business.

**Question 36. Do you currently face challenges with any of the following?
Check all that apply. (n=31)**

Table 34: Challenges



ANSWER CHOICES	RESPONSES
Determining working capital position	16.13% 5
Managing cash flow	58.06% 18
Liquidity	29.03% 9
Collecting receivables	22.58% 7
Securing short-term line of credit	16.13% 5
Securing long-term line of credit	16.13% 5
Other (please specify)	9.68% 3
Total Respondents: 31	

Other includes: Obtaining Consistent Income (1), Most business is one off clients (1), Would like to develop a contract with a larger company (1)

Thirty-one (31) businesses stated that they are currently facing challenges with managing cash flow (58%), liquidity (29%), and collecting receivables (23%).

iv. Staff and Training

Questions 37 to 50 includes questions about the number of family members (paid and unpaid) and employees (full time and part time) employed by the business as well as average payroll costs in winter and summer, training provided and needed for front line and supervisory/management positions.

Summary on staff and training

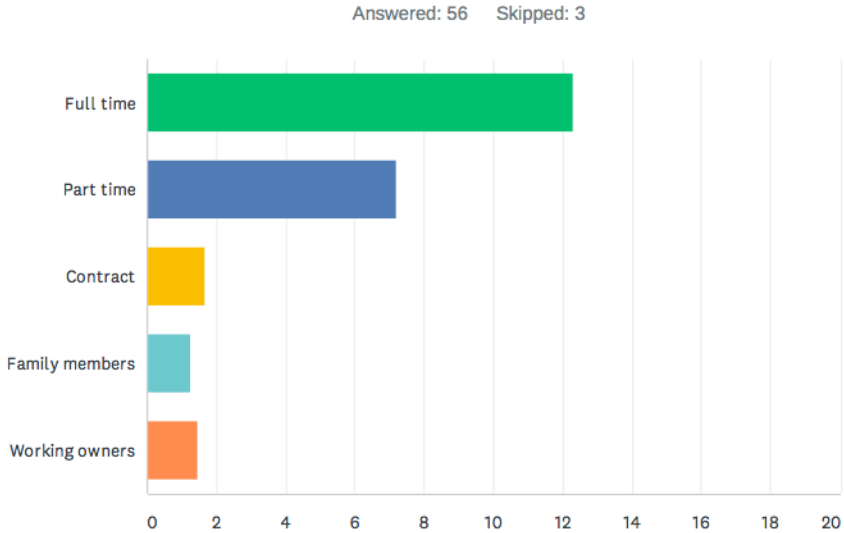
- Paid employees in the surveyed businesses include those who were:
 - Part time (82%)
 - Working owners (79%)
 - Full time (75%)
 - Family members (43%)
 - Contract (38%)
- Businesses who had seasonal employees (n=21) were both full time (86%) and part (67%)
- Payroll costs by average biweekly costs during the last winter season was \$15,963 and \$20,707 during the summer months
- In 2020 (prior to the COVID-19 economic crisis), businesses survey expected to maintain the number of permanent full time and part time employees and seasonal full time and part time employees
- 72% of businesses survey did not have vacant positions at the time of their interview
- New employee recruitment is usually through:
 - Word of mouth (75%)
 - Internet (70%)
 - Personal/business networks (39%)
 - Newspaper/community ad (20%)
 - Employment agency (16%)

- Local college/school (7%)
- Surveyed businesses were evenly divided on the issue of employee retention with 42% stating it was difficult and 44% stating it was not. Those who stated employee retention was an issue stated it was with front line positions (78%), supervisory positions (17%) and management (4%)
- Training needs to be determined by:
 - Mandatory requirements (84%)
 - Management decisions (78%)
 - Performance reviews (51%)
 - Employee requests (47%)
- Training is required in 64% of businesses surveyed and those businesses require training in:
 - Customer service (73%)
 - Communication (57%)
 - Safety and security (51%)
 - Food & beverage handling (51%)
 - Marketing (46%)
 - Visitor friendliness (43%)
 - Merchandise and displays (43%)
 - Supervisory skills (41%)
 - Cash handling (38%)
- The best formats for training according to the businesses surveyed include:
 - In house training by supervisor or in house trainer (82%)
 - Online training (47%)

- Self directed study (35%)
- In house training by an outside trainer (29%)
- Off site training in local community (29%)
- Off site training in nearest major centre (24%)
- Businesses surveyed answered yes to the following materials:
 - 77% had job descriptions for all positions
 - 72% had an employee policy manual
 - 61% had an employee incentive program

Question 37. In 2019, how many paid employees did you have in each of the following categories? Enter a number in each applicable category. (n=56)

Table 35: Paid Employees



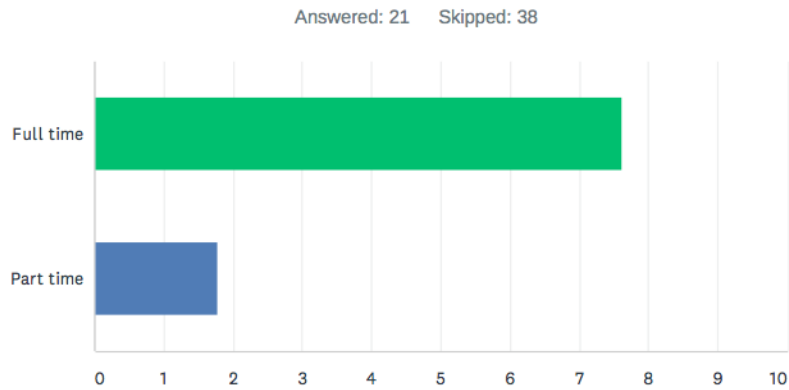
ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
Full time	12	516	42
Part time	7	332	46
Contract	2	35	21
Family members	1	30	24
Working owners	1	64	44
Total Respondents: 56			

Businesses surveyed had paid employees who were:

- Full time (75%)
- Part time (82%)
- Contract (38%)
- Family member (43%)
- Working owner (79%)

Question 38. Seasonal employees are hired for busy periods and usually laid off once the busy period is over. In 2019, how many seasonal employees did you have. In the following categories? (n=21)

Table 36: Seasonal Employees



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
Full time		8	137
Part time		2	25
Total Respondents: 21			

Twenty-one (21) businesses surveyed had seasonal employees; 86% had full time seasonal employees. And, 67% had part time seasonal employees

Question 39. What were your average biweekly payroll costs (excluding owner's salaries) during the last winter season (October 2018 - April 2019)?

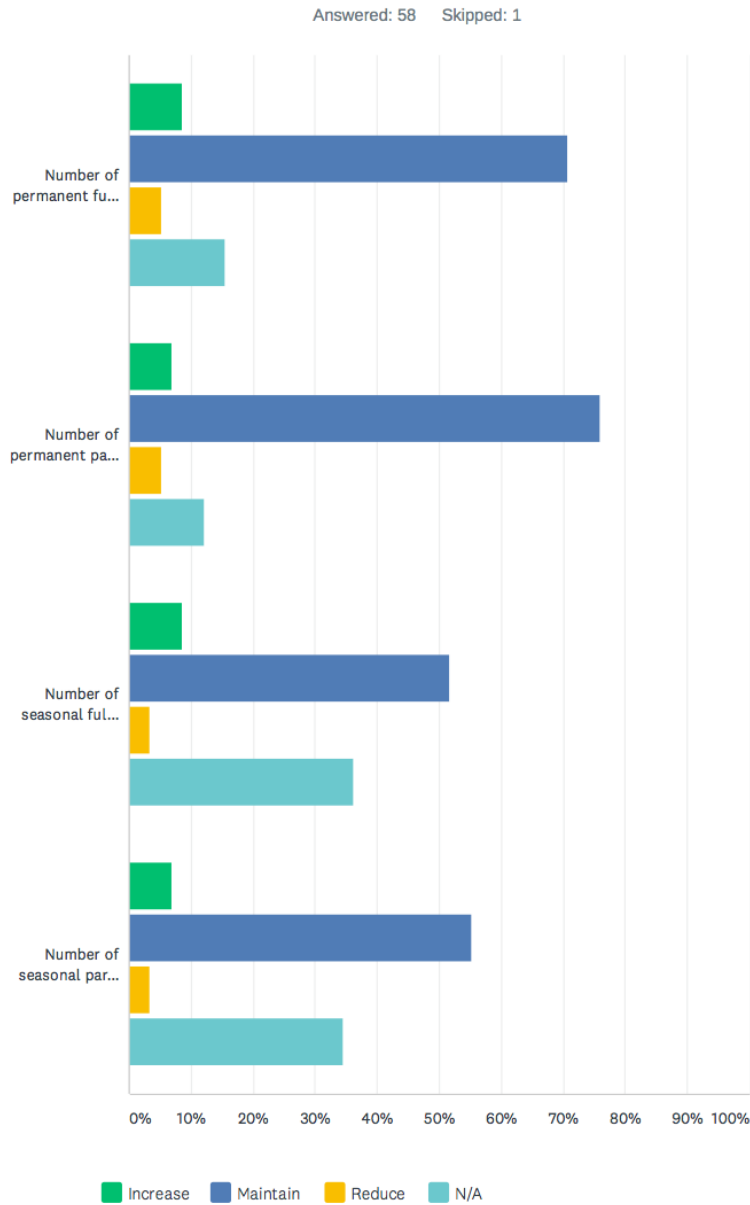
The average biweekly payroll costs during the last winter season (October 2018 to April 2019) was \$15,963

Question 40. In 2019, what were your average biweekly payroll costs (excluding owners' salaries) for the summer months (May - September)?

The average biweekly payroll costs during the summer months from May 2019 to September 2019 was \$20,707

Question 41. In 2020, do you expect to increase, maintain or reduce the number of full time and part time employees (permanent and seasonal) you have on your payroll? (n=58)

Table 37: 2020 Employee Projections



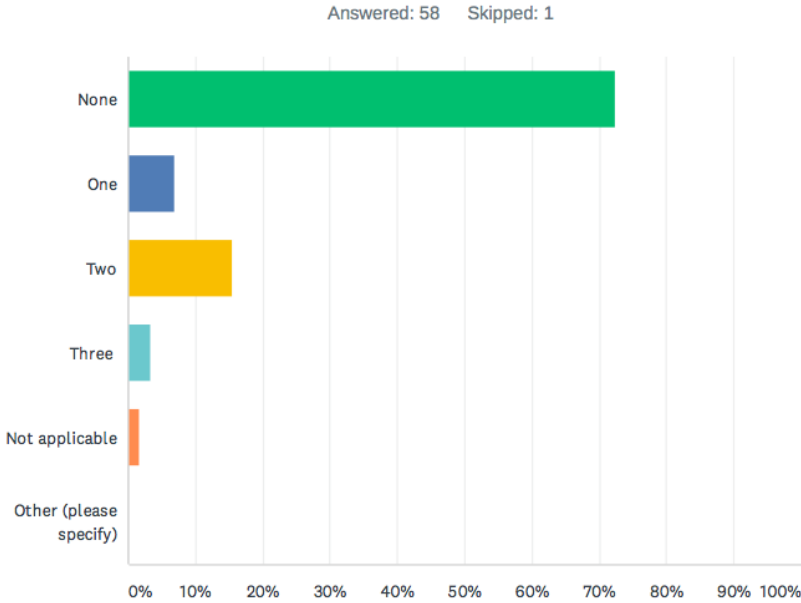
	INCREASE	MAINTAIN	REDUCE	N/A	TOTAL	WEIGHTED AVERAGE
Number of permanent full time	8.62% 5	70.69% 41	5.17% 3	15.52% 9	58	2.96
Number of permanent part time	6.90% 4	75.86% 44	5.17% 3	12.07% 7	58	2.98
Number of seasonal full time	8.62% 5	51.72% 30	3.45% 2	36.21% 21	58	2.92
Number of seasonal part time	6.90% 4	55.17% 32	3.45% 2	34.48% 20	58	2.95

In 2020, businesses surveyed expected to maintain the number of full time and part time employees (permanent and seasonal) on their payroll.

- 71% expected to maintain permanent full time employees
- 76% expected to maintain permanent part time employees
- 52% expected to maintain their seasonal full time employees
- 55% expected to maintain their seasonal part time employees

Question 42. How many vacant positions are there at your business at this time? (n=58)

Table 38: Vacant Positions

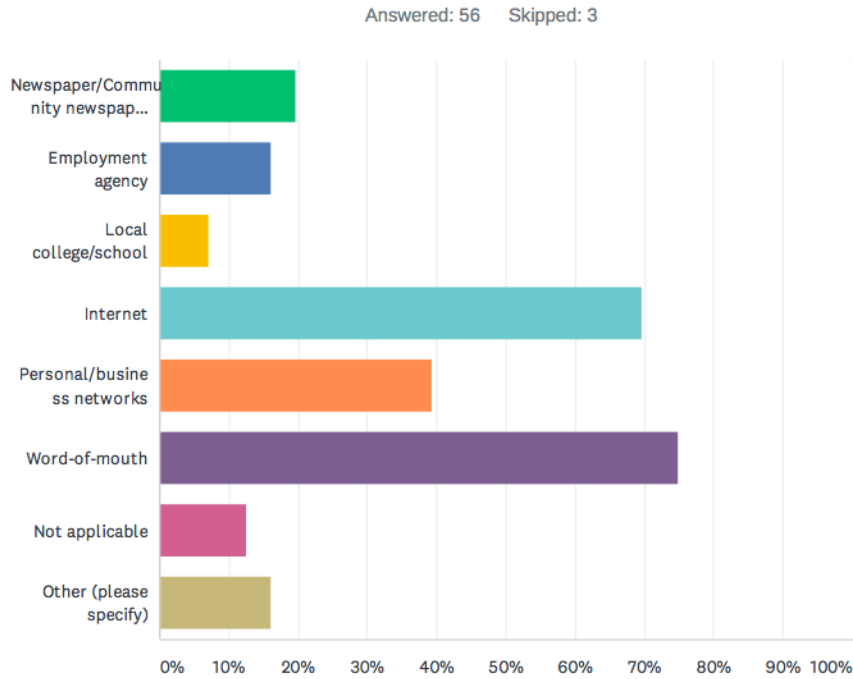


ANSWER CHOICES	RESPONSES	
None	72.41%	42
One	6.90%	4
Two	15.52%	9
Three	3.45%	2
Not applicable	1.72%	1
Other (please specify)	0.00%	0
TOTAL		58

Most businesses (72%) did not have any vacant positions at the time of their interview.

Question 43. How do you recruit new employees? (n=56)

Table 39: Employee Recruitment

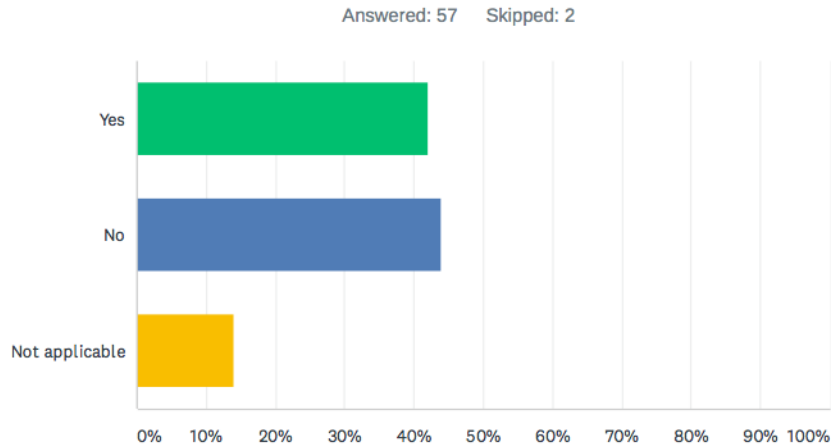


ANSWER CHOICES	RESPONSES	
Newspaper/Community newspaper ad	19.64%	11
Employment agency	16.07%	9
Local college/school	7.14%	4
Internet	69.64%	39
Personal/business networks	39.29%	22
Word-of-mouth	75.00%	42
Not applicable	12.50%	7
Other (please specify)	16.07%	9
Total Respondents: 56		

New employees are usually recruited through word of mouth (75%) and the internet (70%)

**Question 44. Overall, does your business have difficulty retaining employees?
(n=57)**

Table 40: Employee Retention

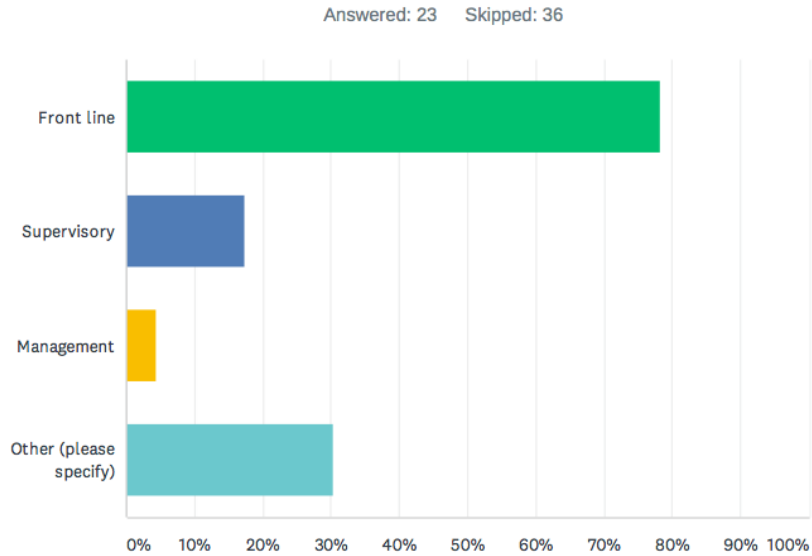


ANSWER CHOICES	RESPONSES	
Yes	42.11%	24
No	43.86%	25
Not applicable	14.04%	8
TOTAL		57

Businesses were almost evenly divided on the issue of employee retention with 42% (24) stating yes and 44% (25) stating no to this question.

Question 45. For which positions? (n=23)

Table 41: Positions



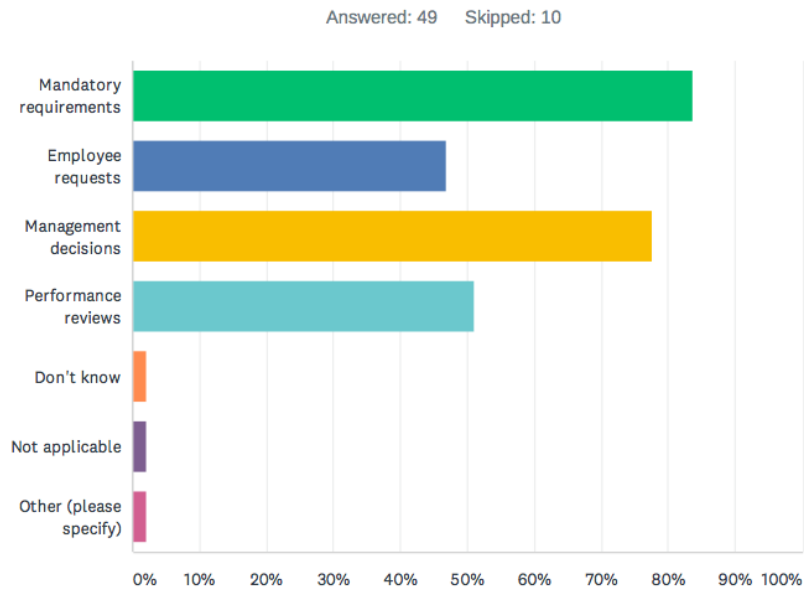
ANSWER CHOICES	RESPONSES	
Front line	78.26%	18
Supervisory	17.39%	4
Management	4.35%	1
Other (please specify)	30.43%	7
Total Respondents: 23		

Other included Kitchen Helper (2), Housekeeping (3), Seasonal Employees (1), Drivers (1)

Of those who had difficulty retaining position (n=23), 78% were for front line positions.

Question 46. How are employee, supervisory, and management training needs determined in your business?

Table 42: Training Needs



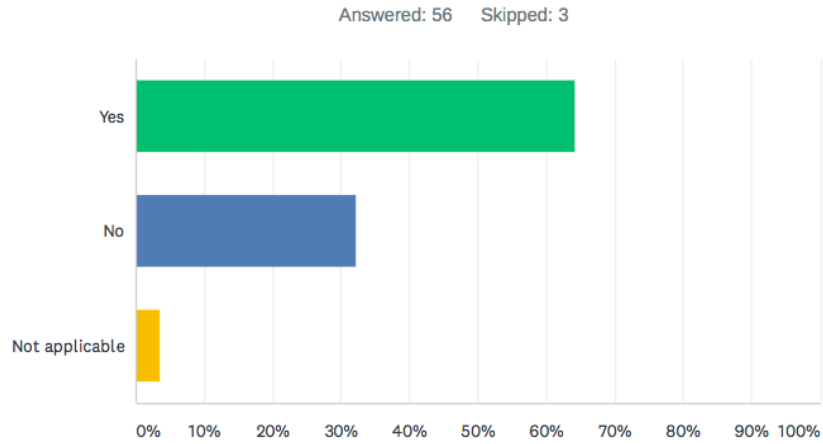
ANSWER CHOICES	RESPONSES
Mandatory requirements	83.67% 41
Employee requests	46.94% 23
Management decisions	77.55% 38
Performance reviews	51.02% 25
Don't know	2.04% 1
Not applicable	2.04% 1
Other (please specify)	2.04% 1
Total Respondents: 49	

Other included: Customer service (1)

Training needs determined in the surveyed by businesses due to mandatory requirements (84%), management decisions (78%) and performance reviews (51%).

**Question 47. Do you, your employees, or management staff require training?
(n=56)**

Table 43: Employee Training

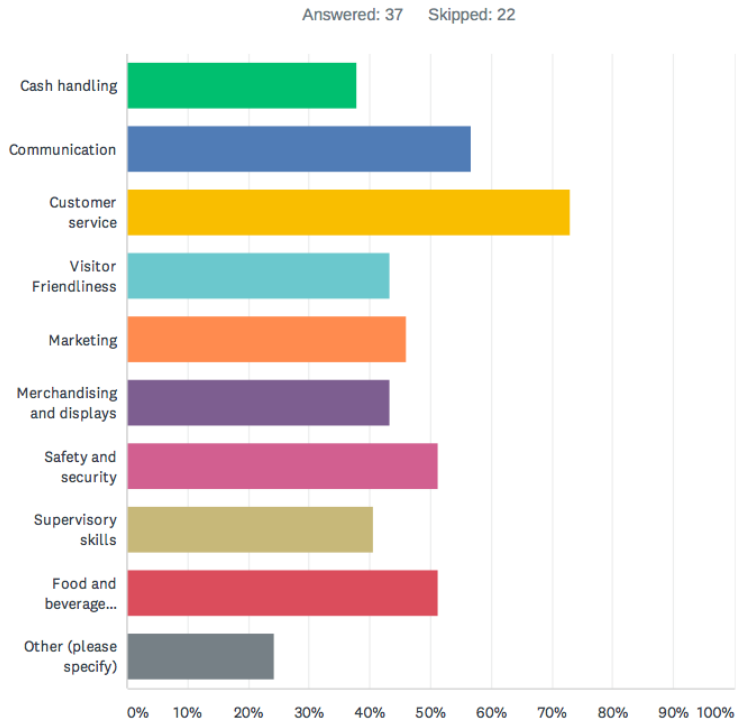


ANSWER CHOICES	RESPONSES	
Yes	64.29%	36
No	32.14%	18
Not applicable	3.57%	2
TOTAL		56

Training is required in 36 (64%) of businesses surveyed.

Question 48. In what areas is training needed? Check all that apply. (n=37)

Table 44: Training Needs



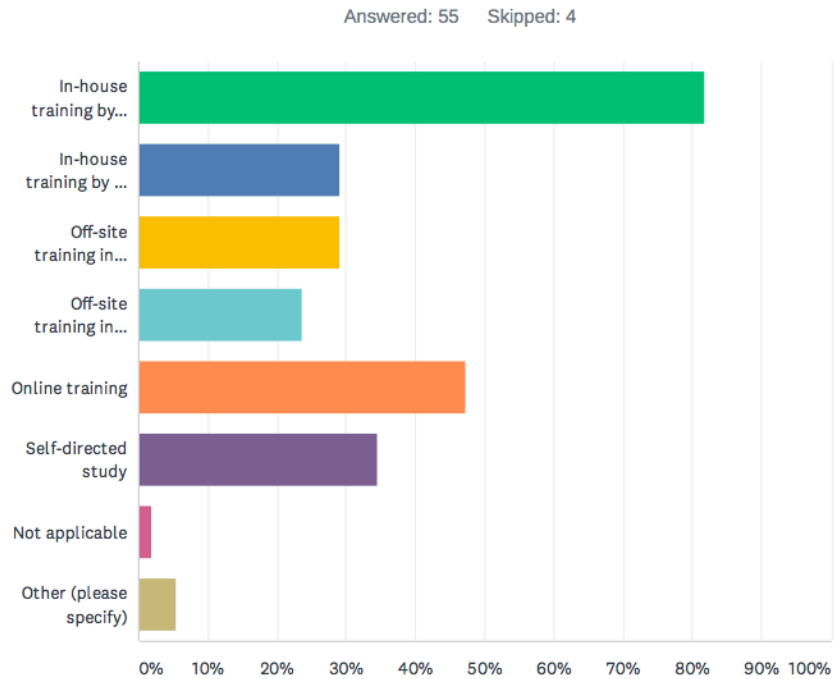
ANSWER CHOICES	RESPONSES
Cash handling	37.84% 14
Communication	56.76% 21
Customer service	72.97% 27
Visitor Friendliness	43.24% 16
Marketing	45.95% 17
Merchandising and displays	43.24% 16
Safety and security	51.35% 19
Supervisory skills	40.54% 15
Food and beverage handling	51.35% 19
Other (please specify)	24.32% 9
Total Respondents: 37	

Other included: Kitchen (1), Financial (1), Website (1), Creative (1), Class 4 License (1), Too specific to say (1), First Aid (2), Technical (1)

Of those that require training (n=37), training is most needed for customer service (73%) and communication (57%).

**Question 49. What are the best formats for most training in your business?
Check all that apply. (n=55)**

Table 45: Best Formats for Training



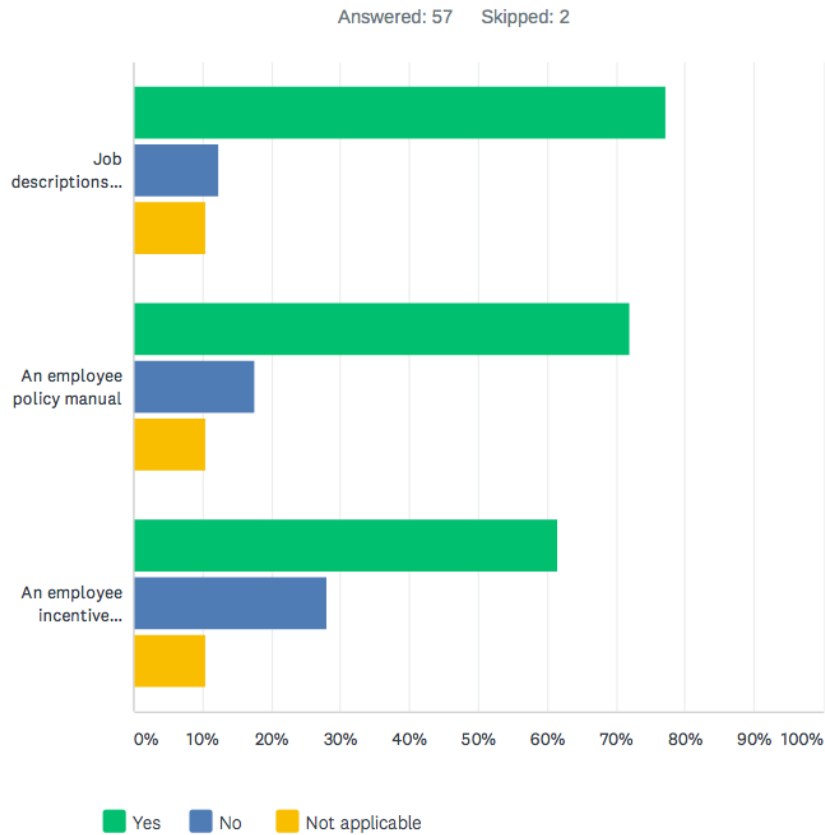
ANSWER CHOICES	RESPONSES	
In-house training by supervisor or in-house trainer	81.82%	45
In-house training by an outside trainer	29.09%	16
Off-site training in local community	29.09%	16
Off-site training in nearest major centre	23.64%	13
Online training	47.27%	26
Self-directed study	34.55%	19
Not applicable	1.82%	1
Other (please specify)	5.45%	3
Total Respondents: 55		

Other included: Corporate driven (2), Varies depending on position (1)

In house training is the most common training preferred by either a supervisor or in house trainer (82%) or by an outside trainer (29%).

Question 50. In your business, do you currently have: (n=57)

Table 46: Human Resources Materials



	YES	NO	NOT APPLICABLE	TOTAL
Job descriptions for all positions	77.19% 44	12.28% 7	10.53% 6	57
An employee policy manual	71.93% 41	17.54% 10	10.53% 6	57
An employee incentive program	61.40% 35	28.07% 16	10.53% 6	57

Businesses surveyed answered that:

- 77% had job descriptions for all positions
- 72% had an employee policy manual
- 61% had an employee incentive program

v. Business Trends & Comparisons

Questions 51 to 56 includes questions about the number of visitors, sales (total revenue), and profits for the business in 2019. They were also asked if these areas increased, decreased, or stayed the same compared to previous years and to provide reasons for the increases and decreases.

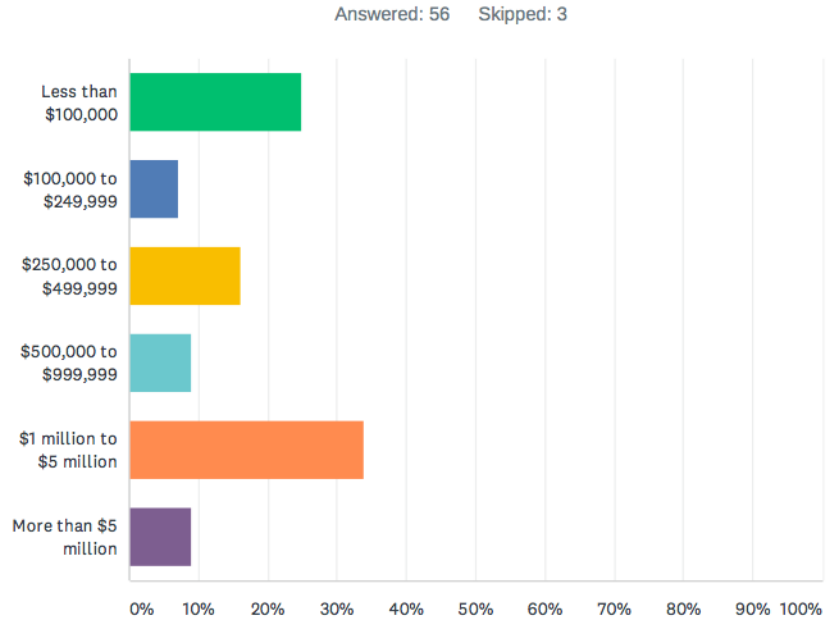
Summary of business performance in 2019:

- Annual revenue for businesses surveyed ranged from:
 - Less than \$100,000 (25%)
 - \$100,000 to \$249,999 (7%)
 - \$250,000 to \$499,999 (16%)
 - \$500,000 to \$999,999 (9%)
 - \$1 million to \$5 million (34%)
 - More than \$5 million (9%)
- Compared to last year, current fiscal year projections are about the same (48%) with few businesses stating they were higher (21%) and lower (26%) than last year.
- Over the past 3 years, the total gross dollar sales trend has increased (52%) with fewer businesses stating that they decreased (21%) and lower (26%) than last year
- Over the past 3 years, the total gross dollars sales trend has increased (52%) with fewer businesses stating that they decreased (21%) or were about the same (24%)
- In 2019, most businesses surveyed stated that number of visitors (53%), sales-total revenue (42%) and profits increased (46%). Those who stated possible reasons for these increases were:
 - More visitors (54%)
 - Marketing activities (51%)
 - Increased awareness of business (41%)

- New/improved products and services (41%)
- Better business practices (31%)
- More events (28%)
- Higher prices/fees (23%)
- Good weather (15%)
- Improved economy (13%)

Question 51. What is the average annual revenue of your business? (n=56)

Table 47: Average Annual Revenue

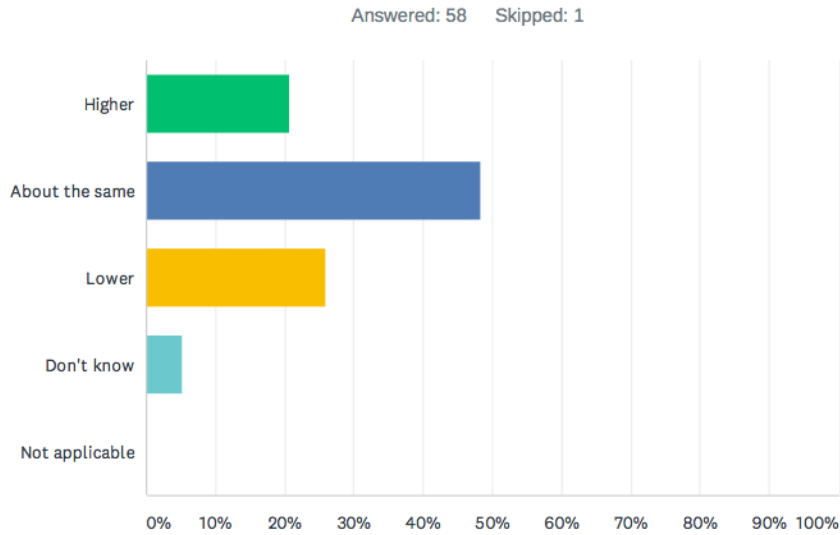


ANSWER CHOICES	RESPONSES	
Less than \$100,000	25.00%	14
\$100,000 to \$249,999	7.14%	4
\$250,000 to \$499,999	16.07%	9
\$500,000 to \$999,999	8.93%	5
\$1 million to \$5 million	33.93%	19
More than \$5 million	8.93%	5
TOTAL		56

Businesses surveyed had a range of annual average revenues showing that a wide range of businesses interviewed for the TIBRE project.

Question 52. What are your sales projections for the current fiscal year as compared to last year? (n=58)

Table 48: Sales Projections

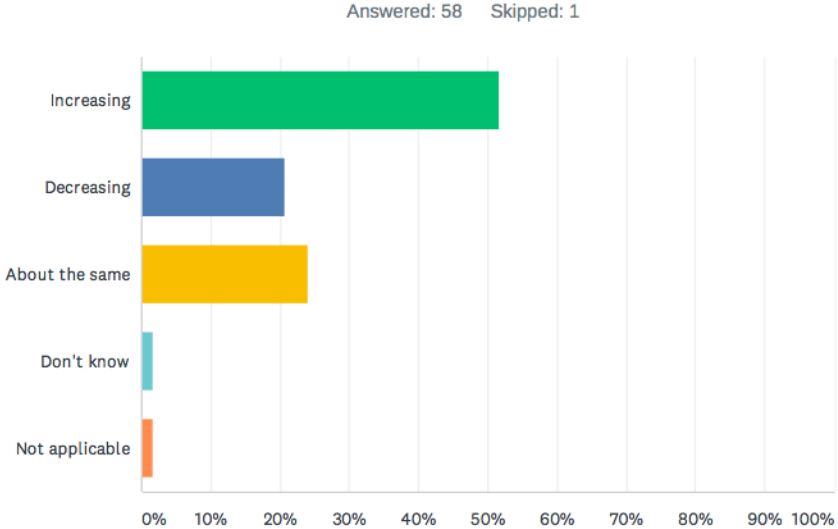


ANSWER CHOICES	RESPONSES	
Higher	20.69%	12
About the same	48.28%	28
Lower	25.86%	15
Don't know	5.17%	3
Not applicable	0.00%	0
TOTAL		58

Sales projects for the current fiscal year as compared to the last was about the same (48%)

Question 53. During the past 3 years, what has been your total gross dollar sales trend? (n=58)

Table 49: Gross Dollar Sales Trend

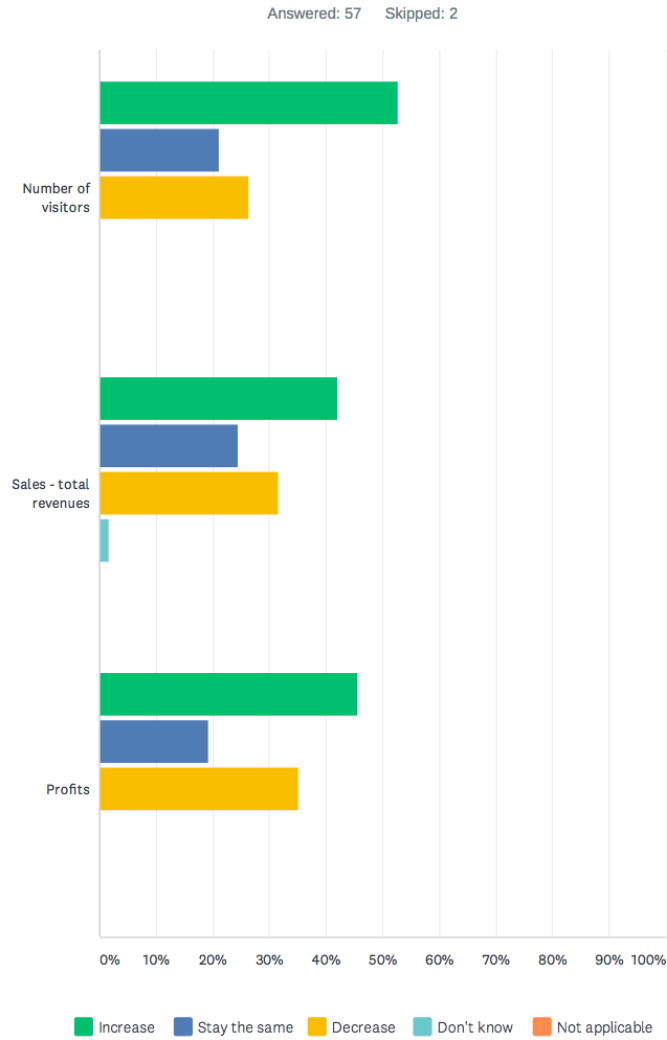


ANSWER CHOICES	RESPONSES	
Increasing	51.72%	30
Decreasing	20.69%	12
About the same	24.14%	14
Don't know	1.72%	1
Not applicable	1.72%	1
TOTAL		58

Gross dollar sales are calculated as the total sales before discounts or returns. 52% of businesses stated that their gross sales are increasing.

Question 54. In 2019, did the following business factors increase, stay the same or decrease? (n=57)

Table 47: Business Factors



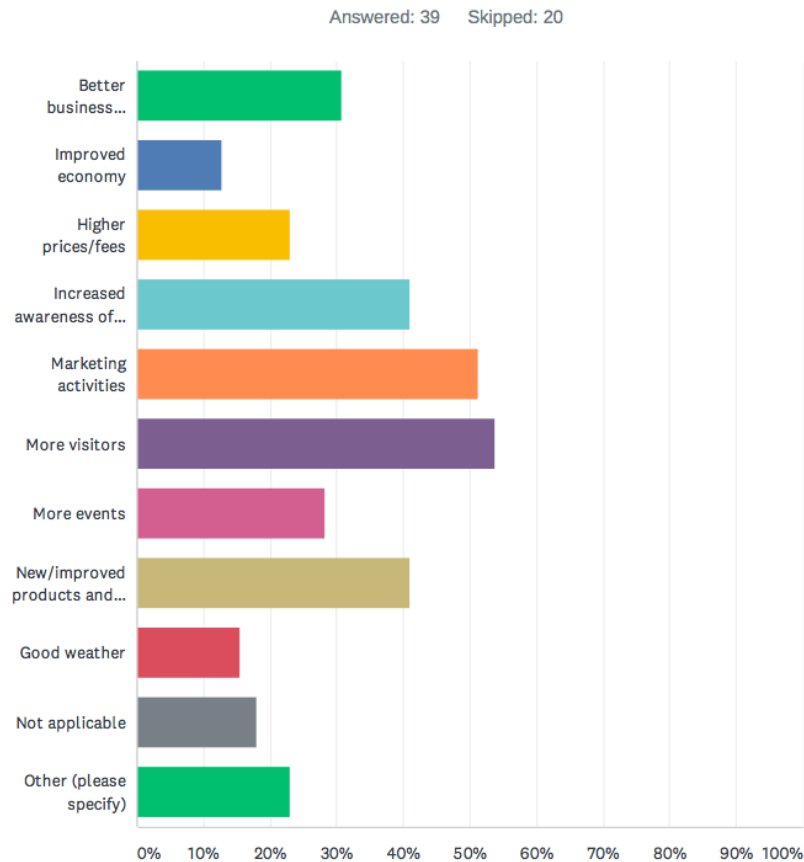
	INCREASE	STAY THE SAME	DECREASE	DON'T KNOW	NOT APPLICABLE	TOTAL
Number of visitors	52.63% 30	21.05% 12	26.32% 15	0.00% 0	0.00% 0	57
Sales - total revenues	42.11% 24	24.56% 14	31.58% 18	1.75% 1	0.00% 0	57
Profits	45.61% 26	19.30% 11	35.09% 20	0.00% 0	0.00% 0	57

In 2019, businesses surveyed noted the following:

- 53% stated their number of visitors increased
- 42% stated their sales - total revenues increased
- 46% stated their profits increased

Question 55. If you answered increase to any of the above, please identify possible reasons for the increase(s) from the list below: (n=39)

Table 51: Possible Reasons for Increase



ANSWER CHOICES	RESPONSES	
Better business practices	30.77%	12
Improved economy	12.82%	5
Higher prices/fees	23.08%	9
Increased awareness of business	41.03%	16
Marketing activities	51.28%	20
More visitors	53.85%	21
More events	28.21%	11
New/improved products and services	41.03%	16
Good weather	15.38%	6
Not applicable	17.95%	7
Other (please specify)	23.08%	9
Total Respondents: 39		

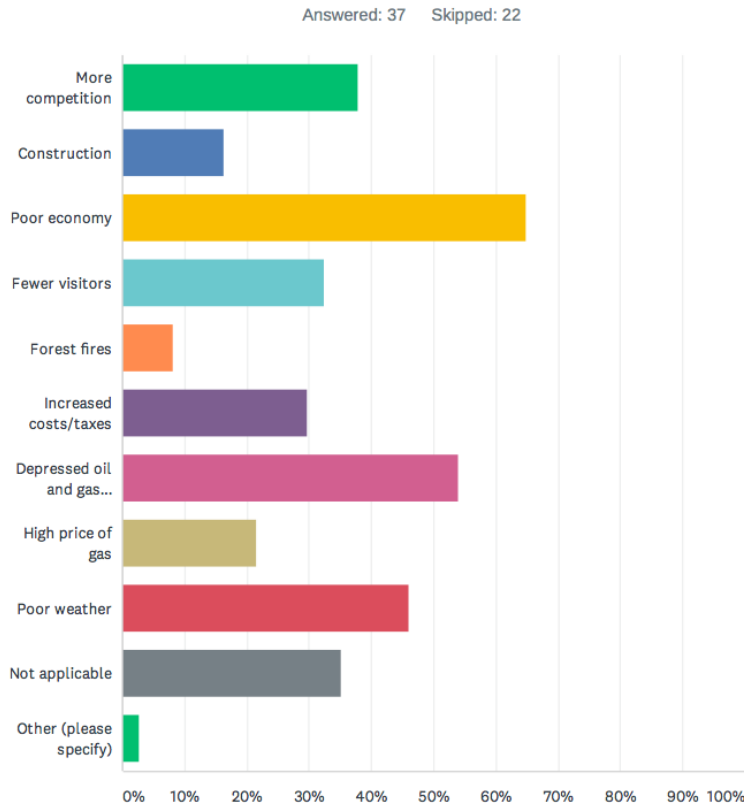
Other included: New business (4), Customer service (1), We are fun (1), Projects (1), Word of mouth (tourists) (1), Working with other businesses (1)

Those businesses who stated that number of visitors, sales - total revenue and profits increased in 2019 were asked for possible reasons why these factors increased. Most common reasons included:

- More visitors (54%)
- Marketing activities (51%)
- New/improved products and services (41%)
- Increased awareness of business (41%)

Question 56. If you answered decrease to any of the above, please identify possible reasons for the decrease(s) from the list below: (n=37)

Table 52: Reasons for Decrease



ANSWER CHOICES	RESPONSES	
More competition	37.84%	14
Construction	16.22%	6
Poor economy	64.86%	24
Fewer visitors	32.43%	12
Forest fires	8.11%	3
Increased costs/taxes	29.73%	11
Depressed oil and gas industry	54.05%	20
High price of gas	21.62%	8
Poor weather	45.95%	17
Not applicable	35.14%	13
Other (please specify)	2.70%	1
Total Respondents: 37		

Other included: Whistler Campground Construction/Closure & Mine Closure (1)

Those who answered that the number of visitors, sales - total revenue and profits decreased in 2019 were asked possible reasons for the decrease. Most common reasons included:

- Poor economy (65%)
- Depressed oil and gas industry (54%)
- Poor weather (46%)

vi. Expectations for 2020

Questions 57 to 69 includes questions that asked businesses to project their expectations for 2020. It is important to note, these expectations are prior to the COVID-19 crisis that began in March 2020.

Summary of Expectations for 2020

- Businesses expected the number of visitors to stay the same in 2020 (40%) and expected sales - total revenues to increase (40%)
- Of those businesses who expected the number of visitors to increase and/or the expected sales - total revenues to increase (n=33), the reasons for the increases were:
 - More visitors (48%)
 - New/improved products and services (42%)
 - Increased awareness of business (39%)
 - Good weather (36%)
 - Marketing activities (36%)
 - Better business practices (24%)
 - More events (21%)
 - Improved economy (18%)
 - Higher prices/fees (18%)

- Of those who announced they expected the number of visitors and/or the expected sales - total revenues to decrease (n=37), the reasons for the decrease were:
 - Poor economy (51%)
 - Depressed oil and gas industry (46%)
 - More competition (32%)
 - Poor weather (32%)
 - Increased cost/taxes (27%)
 - Fewer visitors (24%)
 - High price of gas (11%)
 - Forest fires (11%)
 - Construction (5%)

- 71% of businesses surveyed had a current business plan, 53% had a succession plan for employees and 60% had a succession plan for ownership

- 33% of businesses surveyed were planning to expand in 2020 or 2021. Of those businesses (n=19), expansion will lead to:
 - Additional services for customers (89%)
 - Additional product lines (68%)
 - An increase in workforce (53%)
 - Additional investment in equipment and technology (42%)
 - An increase. In floor space (26%)
 - Importing goods and services to Canada (5%)
 - Exporting goods and services (5%)

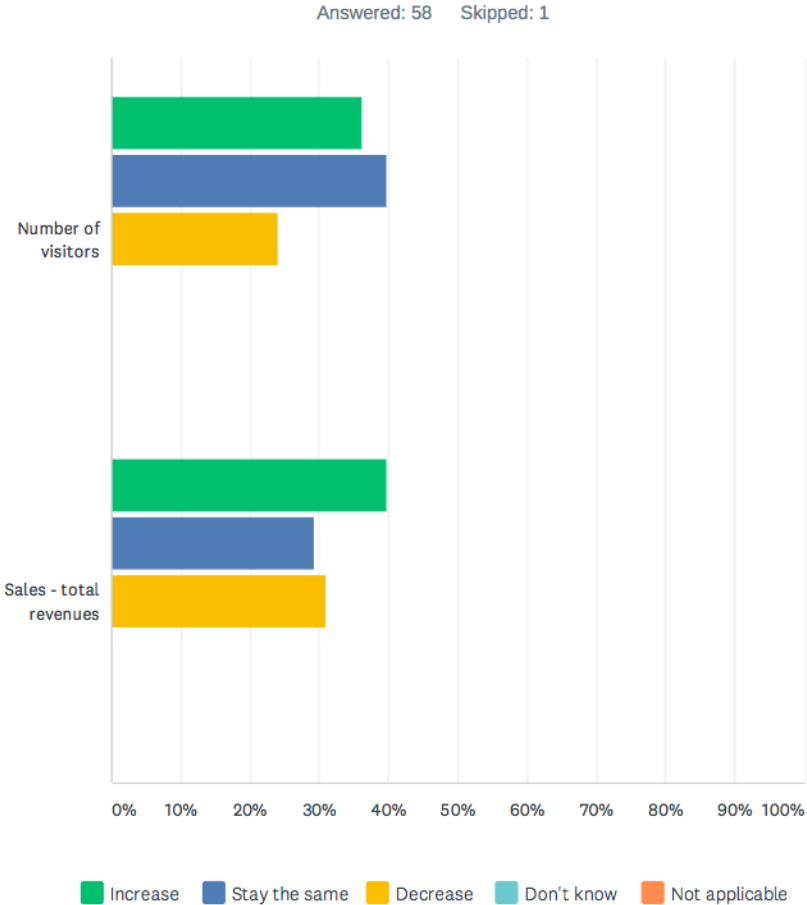
- 2 businesses were planning to downsize, closer, or sell in 2020 (3%) and their decisions were unique to the businesses (see question 65 results)

- 88% of businesses surveyed were planning to operate their business in 2020 at its current state and capacity mainly without changes because of:
 - Current economic climate (49%)
 - Business is at capacity and does not require an expansion (47%)
 - Inadequate financial return on improvements/investments (24%)
 - Increased costs (24%)
 - Seasonality of business (9%)

- 3 businesses started they were planning to relocate in 2020 or 2021 and those businesses were planning to move within Hinton.

Question 57. Based on your knowledge to date and observed trends in your business, do you expect the following business factors to increase, stay the same, or decrease in 2020? (n=58)

Table 53: Observed Trends

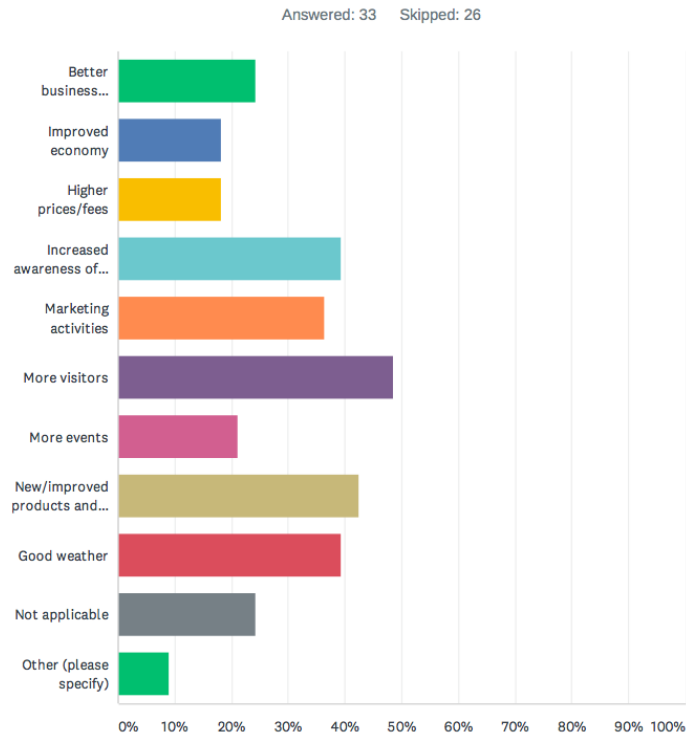


	INCREASE	STAY THE SAME	DECREASE	DON'T KNOW	NOT APPLICABLE	TOTAL
Number of visitors	36.21% 21	39.66% 23	24.14% 14	0.00% 0	0.00% 0	58
Sales - total revenues	39.66% 23	29.31% 17	31.03% 18	0.00% 0	0.00% 0	58

Based on the surveyed businesses knowledge and observed trends, businesses expected the number of visitors to mostly stay the same (40%) in 2020 and expected their sales – total revenues to increase (40%)

Question 58. If you answered increase to any of the above, please identify reasons you expect the increase(s) from the list below:

Table 54: Increase(s)



ANSWER CHOICES	RESPONSES	
Better business practices	24.24%	8
Improved economy	18.18%	6
Higher prices/fees	18.18%	6
Increased awareness of business	39.39%	13
Marketing activities	36.36%	12
More visitors	48.48%	16
More events	21.21%	7
New/improved products and services	42.42%	14
Good weather	39.39%	13
Not applicable	24.24%	8
Other (please specify)	9.09%	3
Total Respondents: 33		

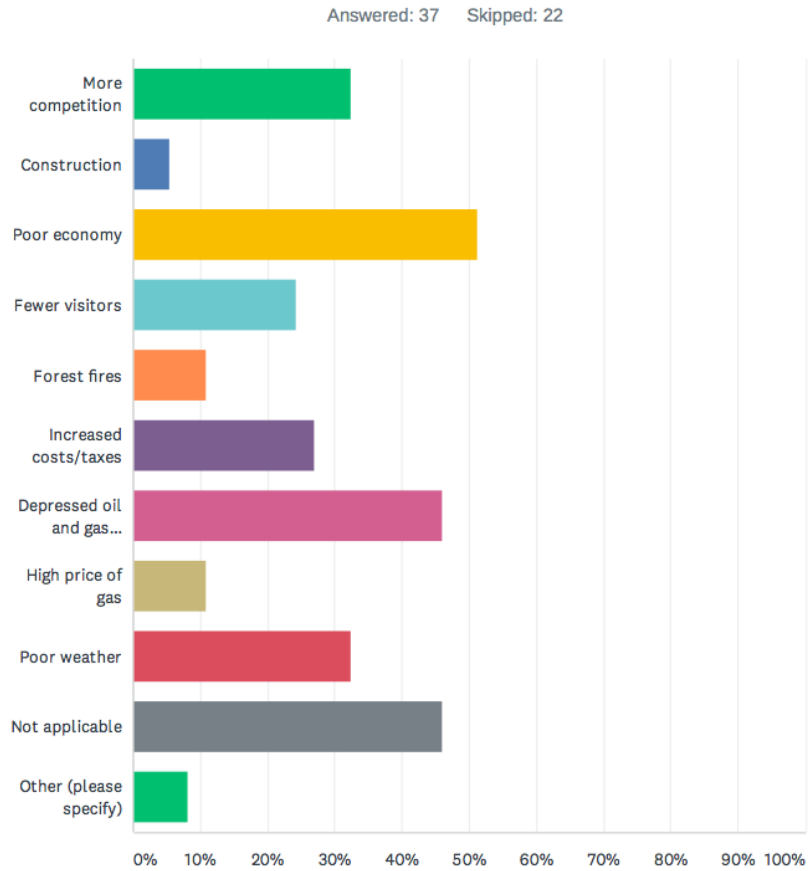
Other included: New business (2) Pipeline coming through town will increase our visitors (1)

Of those that expected number of visitors and/or their sales-revenue to increase in 2020, the reasons for the increases were:

- More visitors (49%)
- Increased awareness of business (39%)
- Good weather (39%)

Question 59. If you answered decrease to any of the above, please identify reasons you expect the decrease(s) from the list below: (n=37)

Table 55: Decrease



ANSWER CHOICES	RESPONSES	
More competition	32.43%	12
Construction	5.41%	2
Poor economy	51.35%	19
Fewer visitors	24.32%	9
Forest fires	10.81%	4
Increased costs/taxes	27.03%	10
Depressed oil and gas industry	45.95%	17
High price of gas	10.81%	4
Poor weather	32.43%	12
Not applicable	45.95%	17
Other (please specify)	8.11%	3
Total Respondents: 37		

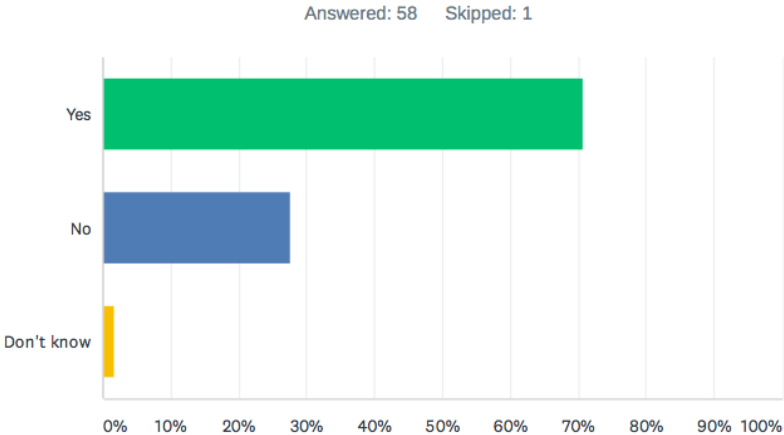
Other included: Heating and electricity are much more expensive this year (1), Closure of Mine (1), and The weather greatly affected our customer base this year - no one wanted to go out with the poor weather. We are much busier when the sun is shining. (1)

Of those that said that they were planning on decreasing their business in 2020 (n=37), the main reasons were:

- Poor economy (51%)
- Depressed oil and gas industry (46%)
- High cost of gas (11%)
- Poor weather (32%)
- Other (8%)

Question 60. A business plan is a formal statement of a set of business goals, the reasons why they are believed attainable, and the plan for reaching those goals. Does your business have a current business plan that is used to guide operations? (n=58)

Table 56: Business Plan

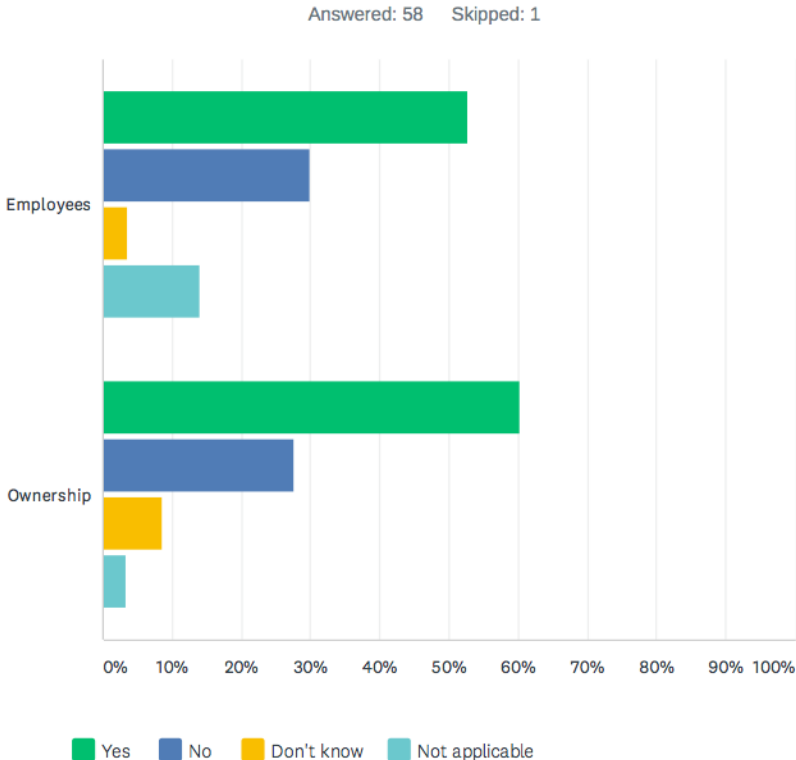


ANSWER CHOICES	RESPONSES	
Yes	70.69%	41
No	27.59%	16
Don't know	1.72%	1
TOTAL		58

71% of businesses surveyed stated they had a business plan to guide operations

Question 61. A succession plan includes the process of (a) identifying and preparing employees to fill key positions within an organization before the positions are vacant and/or (b) planning for transfer of ownership. Does your business have. A succession plan for: (n=58)

Table 57: Succession Plan

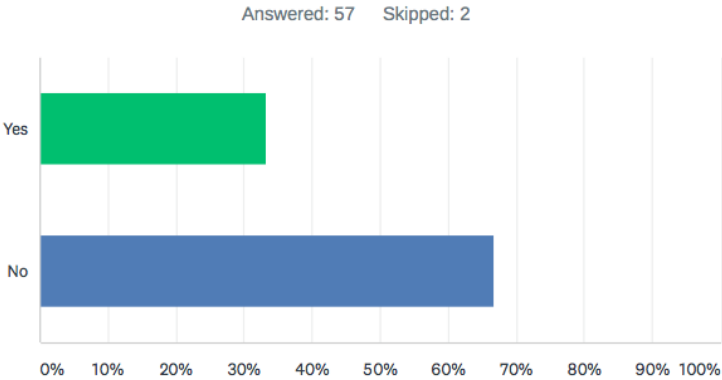


	YES	NO	DON'T KNOW	NOT APPLICABLE	TOTAL
Employees	52.63% 30	29.82% 17	3.51% 2	14.04% 8	57
Ownership	60.34% 35	27.59% 16	8.62% 5	3.45% 2	58

53% of business surveyed has a succession plan for employees and 60% has a succession plan for ownership

**Question 62. Are you planning to expand your business in 2020 or 2021?
(n=57)**

Table 58: Expand your Business

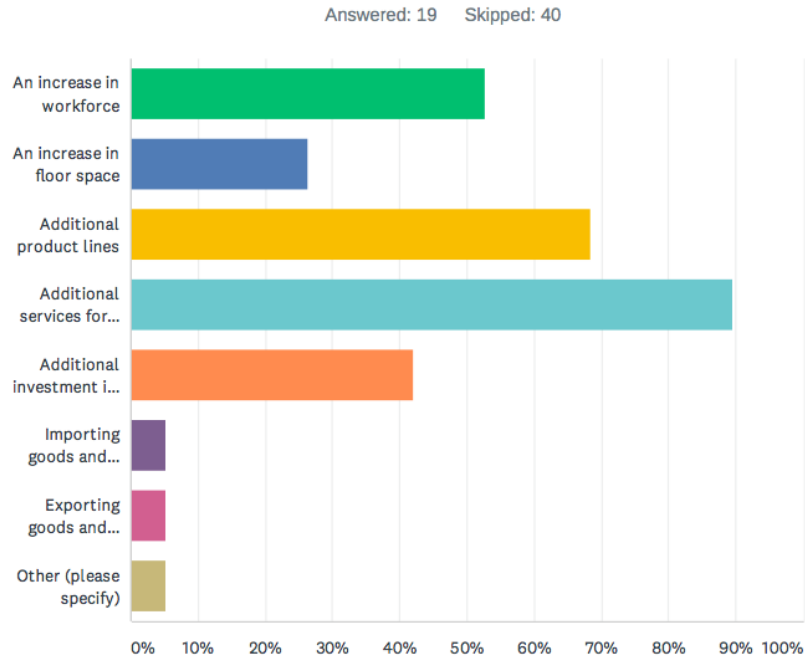


ANSWER CHOICES	RESPONSES	
Yes	33.33%	19
No	66.67%	38
TOTAL		57

33% of businesses are planning on expanding in 2020 or 2021.

Question 63. What will your Expansion Lead to? (n=19)

Table 59: Expansion



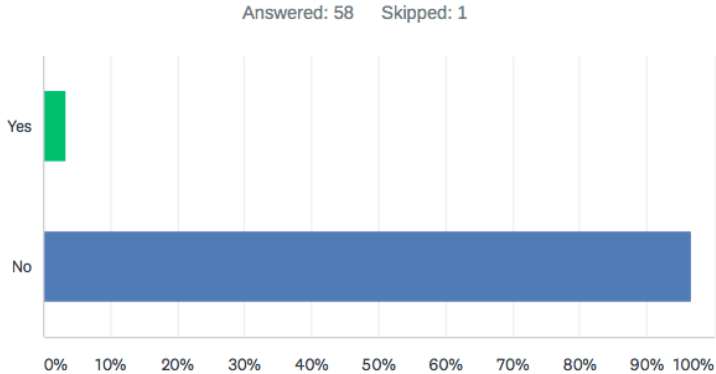
ANSWER CHOICES	RESPONSES
An increase in workforce	52.63% 10
An increase in floor space	26.32% 5
Additional product lines	68.42% 13
Additional services for customers	89.47% 17
Additional investment in equipment and technology	42.11% 8
Importing goods and services to Canada	5.26% 1
Exporting goods and services	5.26% 1
Other (please specify)	5.26% 1
Total Respondents: 19	

Other included: Connecting with people (1)

Of those businesses who started they were planning to expand in 2020 or 2021 (n=19), 89% of businesses said that an expansion would lead to additional services for their customers, 68% said additional product lines, and 53% said an increase in workforce.

Question 64. Are you planning to downsize, close or sell your business in 2020 or 2021?

Table 60: 2020/2021 Projections

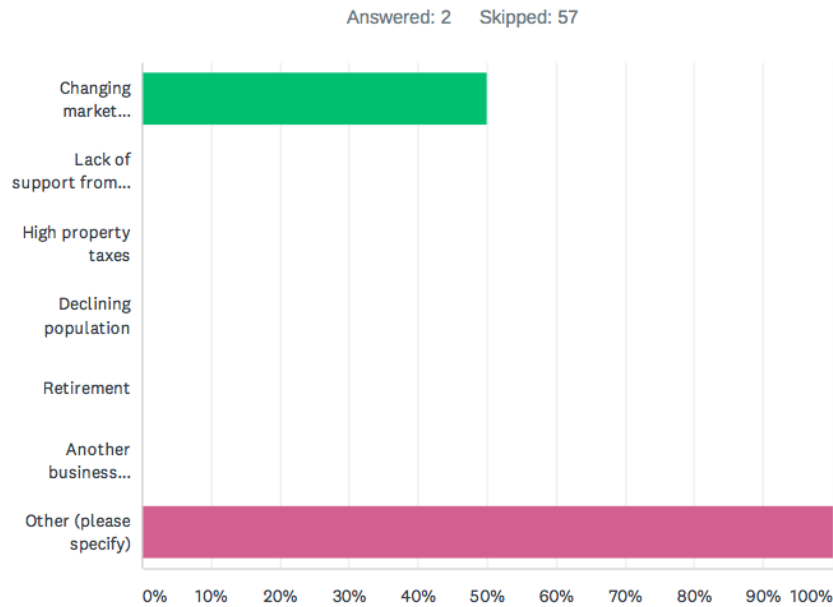


ANSWER CHOICES	RESPONSES	
Yes	3.45%	2
No	96.55%	56
TOTAL		58

97% of businesses are not planning to downsize, close, or sell their business in 2020 or 2021.

Question 65. If you are downsizing, closing or selling, which of the following are influencing your decision at this time? (n=2)

Table 61: Decision Influencers

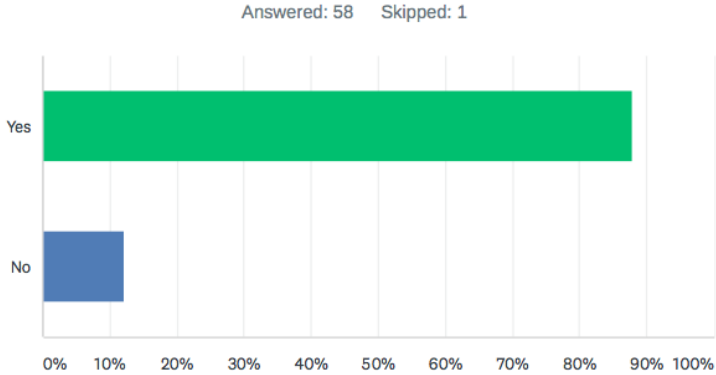


ANSWER CHOICES	RESPONSES	
Changing market conditions	50.00%	1
Lack of support from local/provincial/federal organizations	0.00%	0
High property taxes	0.00%	0
Declining population	0.00%	0
Retirement	0.00%	0
Another business opportunity	0.00%	0
Other (please specify)	100.00%	2
Total Respondents: 2		

The 2 businesses who said that they were planning to downsize or close in 2020, reasons stated were because of changing market conditions and other included: Industry changes so fast - every season is different (1), and Space is way too big (1)

Question 66. Do you plan to continue operating your business at its current state and capacity? (n=58)

Table 62: Current State and Capacity

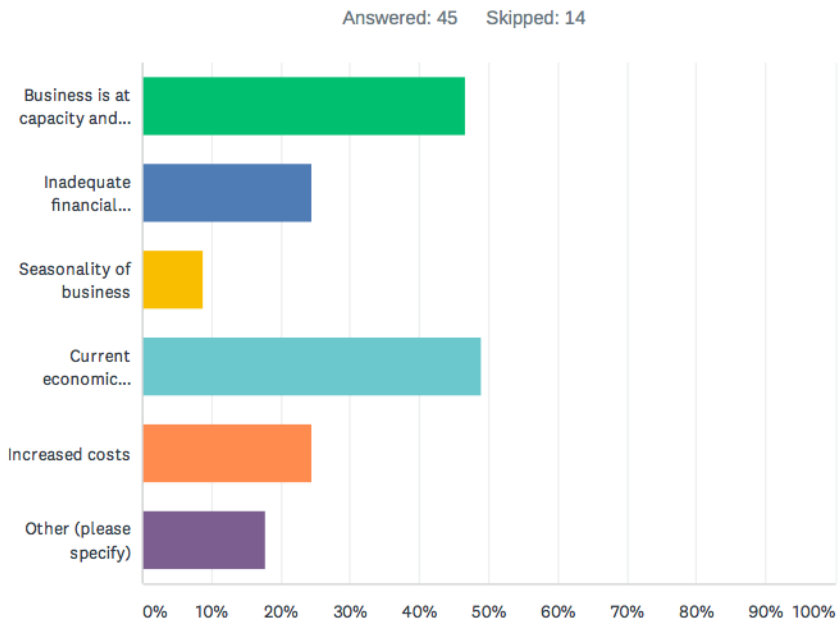


ANSWER CHOICES	RESPONSES	
Yes	87.93%	51
No	12.07%	7
TOTAL		58

88% of businesses plan to continue operating their business at its current state and capacity.

**Question 67. Which of the following reasons are influencing your decision?
(n=45)**

Table 63: Decision Influences



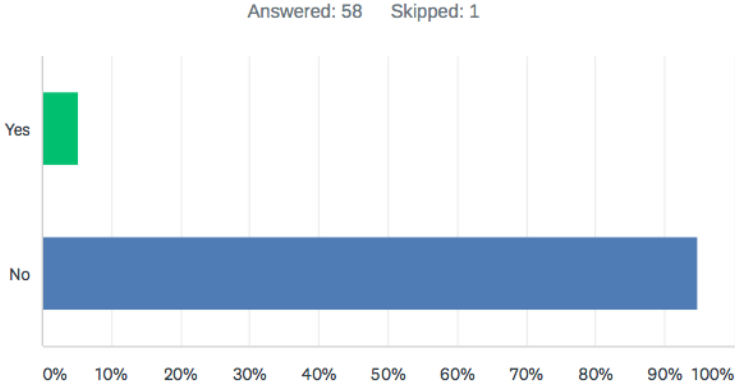
ANSWER CHOICES	RESPONSES
Business is at capacity and does not require an expansion	46.67% 21
Inadequate financial return on improvements/investments	24.44% 11
Seasonality of business	8.89% 4
Current economic climate	48.89% 22
Increased costs	24.44% 11
Other (please specify)	17.78% 8
Total Respondents: 45	

Other included: Size of building is a limit but we are locked into a lease (2), New Business (1), No room in facility to grow any larger (1), Carbon Tax increased the heat in our older building - it's unsustainable (1), Competition (1) All cost driven (1) This question doesn't make sense - it doesn't tie to what they are asking. Should have something in the prior question that asks about increase/decrease (1)

Businesses who were not chasing their business model for 2020 (n=45), were remaining the same because business is at capacity (47%)

**Question 68. Are you planning to relocate your business in 2020 or 2021?
(n=58)**

Table 64: Relocation Plans

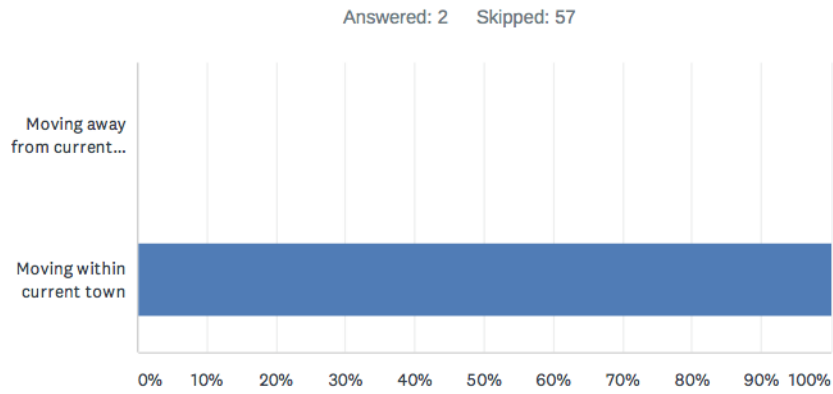


ANSWER CHOICES	RESPONSES	
Yes	5.17%	3
No	94.83%	55
TOTAL		58

95% of businesses are not planning on relocating in 2020 or 2021.

Question 69. If you are relocating the business, are you considering moving away from your current town or moving within your current town? (n=2)

Table 65: New Location



ANSWER CHOICES	RESPONSES	
Moving away from current town	0.00%	0
Moving within current town	100.00%	2
TOTAL		2

The two businesses who are planning to relocate are moving within Hinton

vii. Current Business Climate

Questions 70 to to 77 address the current business climate in Hinton.

Summary of Business Climate Questions

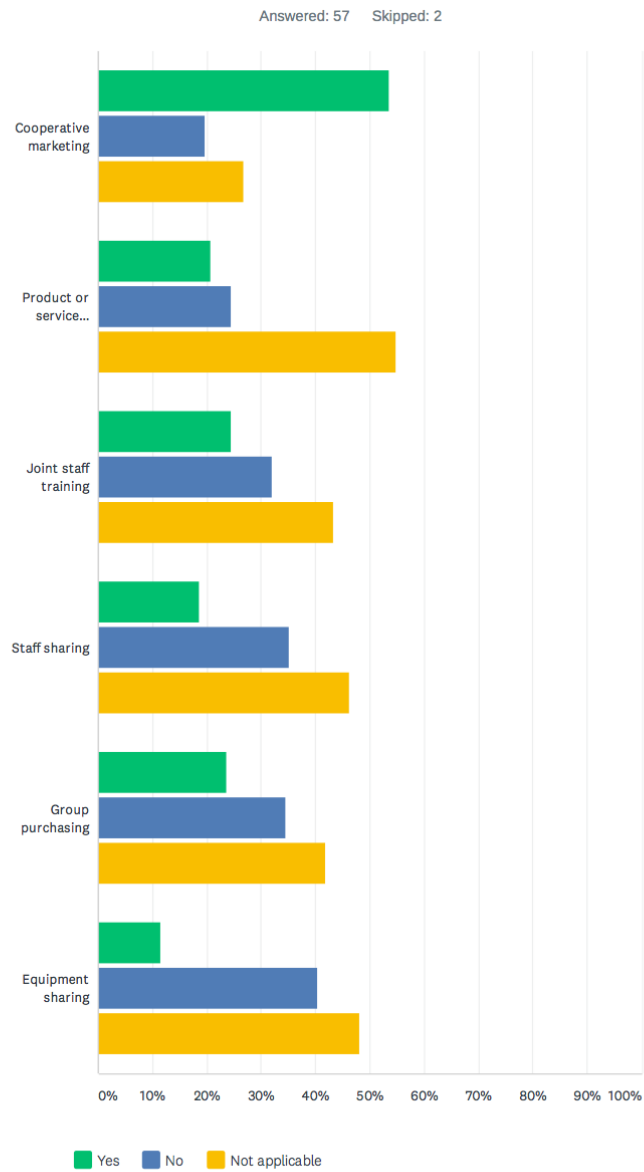
- Businesses were asked to identify an interest in working collaboratively with businesses in the following areas:
 - Cooperative marketing (54%)
 - Product or service distribution (21%)
 - Joint staff training (25%)
 - Staff sharing (19%)
 - Group purchasing (24%)
 - Equipment sharing (12%)
- When asked for the same criteria if it would be an advantage or disadvantage:
 - Cooperative marketing - advantage for (57%)
 - Product or service distribution - advantage for (27%)
 - Joint staff training - advantage for (26%)
 - Staff sharing - disadvantage for (19%)
 - Group purchasing - advantage for (26%)
 - Equipment sharing - disadvantage for (21%)
- 31 businesses stated they experienced barriers to opening their businesses. These barriers included:
 - Volatile economy (42%)
 - Inadequate labour supply (39%)
 - Market size (32%)

- Cost of land or rent (29%)
- Slow approval process (29%)
- High taxes (19%)
- Resistance from local business (16%)
- Lack of proactive business recruitment (16%)
- Availability of properly zoned and designated land (16%)
- Availability of space for rent or lease (16%)
- Levies on expansion (3%)
- Inadequate transportation (3%)
- Businesses were asked to identify services that would be beneficial to themselves and/or their employees in addition to what is already available in Hinton:
 - Entertainment (68%)
 - Retail services (66%)
 - Housing availability (61%)
 - Recreation (54%)
 - Dining (43%)
 - Professional services (43%)
 - Financial services (30%)
- When asked what was needed to enhance the visitor experience, businesses stated:
 - Attractions (75%)
 - Entertainment (70%)
 - Tourism information (65%)
 - Dining (48%)

- Accommodation (41%)

Question 70. Are you interested in pursuing opportunities or addressing challenges in collaboration with other businesses in any of the following areas? (n=57)

Table 66: Collaboration

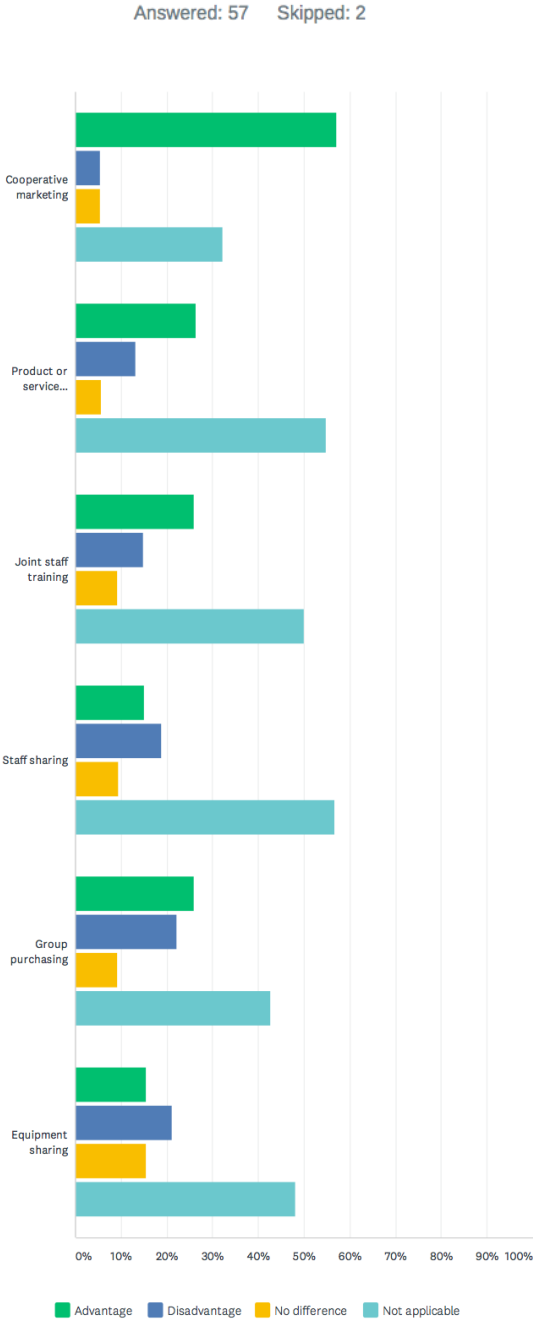


	YES	NO	NOT APPLICABLE	TOTAL
Cooperative marketing	53.57% 30	19.64% 11	26.79% 15	56
Product or service distribution	20.75% 11	24.53% 13	54.72% 29	53
Joint staff training	24.53% 13	32.08% 17	43.40% 23	53
Staff sharing	18.52% 10	35.19% 19	46.30% 25	54
Group purchasing	23.64% 13	34.55% 19	41.82% 23	55
Equipment sharing	11.54% 6	40.38% 21	48.08% 25	52

Businesses were asked to identify areas by yes or no answers on whether they were interested in pursuing opportunities or addressing challenges with other businesses. One area of positive collaboration could occur in cooperative marketing where 30 businesses indicated a positive interest.

Question 71. Which of the following do you consider an advantage or disadvantage to doing business? (n= 57)

Table 67: Advantage/Disadvantage

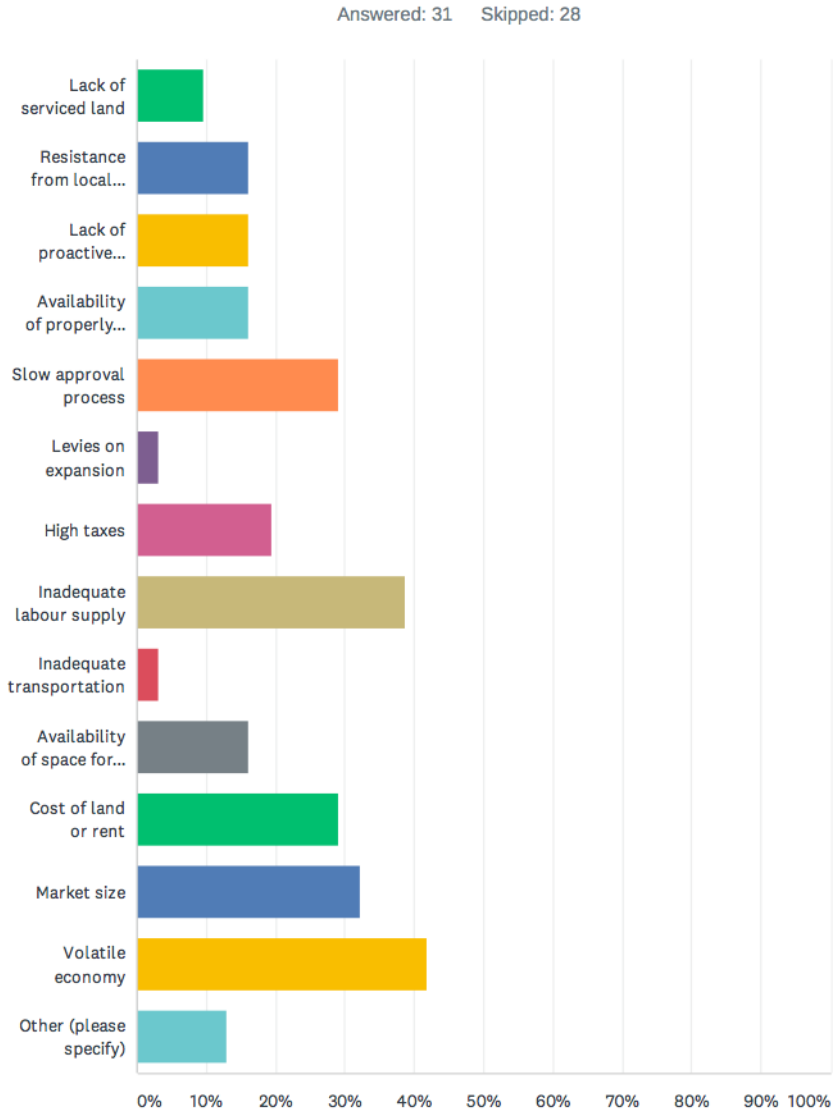


	ADVANTAGE	DISADVANTAGE	NO DIFFERENCE	NOT APPLICABLE	TOTAL
Cooperative marketing	57.14% 32	5.36% 3	5.36% 3	32.14% 18	56
Product or service distribution	26.42% 14	13.21% 7	5.66% 3	54.72% 29	53
Joint staff training	25.93% 14	14.81% 8	9.26% 5	50.00% 27	54
Staff sharing	15.09% 8	18.87% 10	9.43% 5	56.60% 30	53
Group purchasing	25.93% 14	22.22% 12	9.26% 5	42.59% 23	54
Equipment sharing	15.38% 8	21.15% 11	15.38% 8	48.08% 25	52

57% of businesses interviewed said that cooperative marketing would be an advantage.

Question 72. Did you experience any of the following barriers to opening your business? Check all that apply. (n=31)

Table 68: Barriers



ANSWER CHOICES	RESPONSES	
Lack of serviced land	9.68%	3
Resistance from local business	16.13%	5
Lack of proactive business recruitment	16.13%	5
Availability of properly zoned and designated land	16.13%	5
Slow approval process	29.03%	9
Levies on expansion	3.23%	1
High taxes	19.35%	6
Inadequate labour supply	38.71%	12
Inadequate transportation	3.23%	1
Availability of space for rent or lease	16.13%	5
Cost of land or rent	29.03%	9
Market size	32.26%	10
Volatile economy	41.94%	13
Other (please specify)	12.90%	4
Total Respondents: 31		

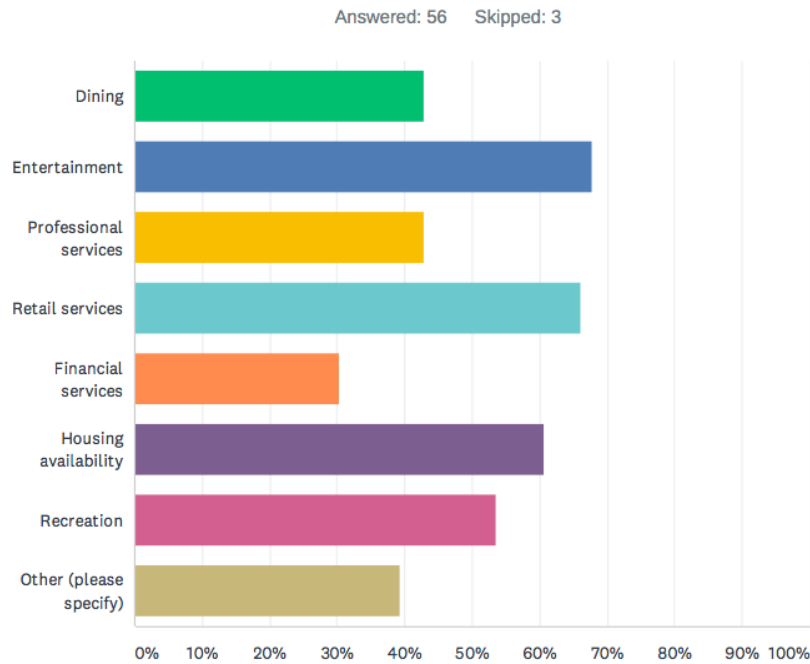
Other included: Affordable rent for business (1), Signage approval with town (1), There were higher expectations of consumers when we opened, but it wasn't realistic. The economy has changed since we opened. (1) The county was amazing to deal with - they made the process extremely easy (1)

The most common barriers to opening businesses were:

- Volatile economy (42%)
- Inadequate labour supply (39%)
- Market size (32%)

Question 73. Are there any services that would be beneficial to you or your employees living in the community in addition to what is already here? (n=56)

Table 69: Services for Employees



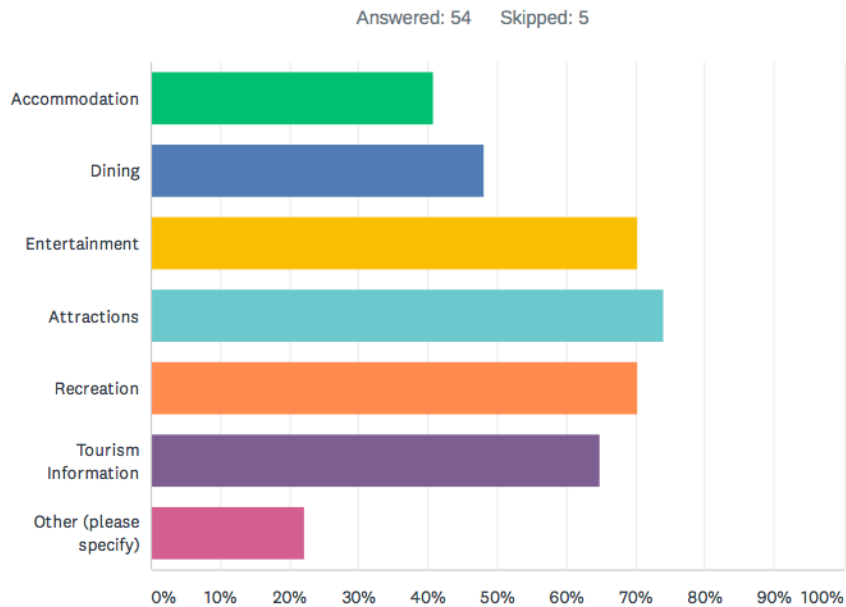
ANSWER CHOICES	RESPONSES	
Dining	42.86%	24
Entertainment	67.86%	38
Professional services	42.86%	24
Retail services	66.07%	37
Financial services	30.36%	17
Housing availability	60.71%	34
Recreation	53.57%	30
Other (please specify)	39.29%	22
Total Respondents: 56		

Other included: Affordable housing (10), Disconnect between the hill and the valley (1), Clothing stores (1) Affordable dining (1), Affordable groceries (1), More hair salons (1), Senior housing (2) Nightlife (2) Youth activities (1) Better recreation centre (2)

Businesses said that more entertainment options (68%) and retail options (66%) would be beneficial to their employees.

Question 74. In your opinion what services are needed to enhance the visitor experience in the area? Check all that apply. (n=54)

Table 70: Services for Visitors



ANSWER CHOICES	RESPONSES	
Accommodation	40.74%	22
Dining	48.15%	26
Entertainment	70.37%	38
Attractions	74.07%	40
Recreation	70.37%	38
Tourism Information	64.81%	35
Other (please specify)	22.22%	12
Total Respondents: 54		

Other included: Reasons for tourists to visit the valley (1), Grocery stores (1), More activities for youth (3), Camping (1), Transportation, Accessibility (1), Affordable accommodations (1), Better marketing of Hinton as a destination (4)

Businesses surveyed stated that Hinton, in their opinion needs more attractions (74%), recreation (70%), and entertainment (70%).

Questions 75 to 77 asked businesses to rate on a scale of 1 to 10, their opinion on statements on the Hinton tourism industry. 1 represented completely disagree and 10 represented completely agree.

Question 75. Your Community Supports Tourism Businesses? (n=55)

The average answer for this question was 6

Question 76. Is it easy to find, recruit, and retain good quality staff?

The average answer for this question was 5

Question 79. I would like to work with our local government to create promotional pieces for our town.

The average answer for this question was 6

vii. Additional Comments

- We are right beside Jasper. We need to capitalize on this like Canmore does since we are directly beside it. Air BNBs are full - we need to give tourists a better experience. In the business community if it has to do with dedication that isn't a direct benefit, it falls apart really fast.
- There's no variety to our grocery stores. We need to leave town to shop. Would love to see a Save On Foods in town.
- Business rent is high - astronomical. It costs just as much as biweekly labour.
- We are an overflow town with a weird dynamic. We moved here for industry - Hinton is a good place to make money but isn't good for much else. Recreation does not bring people into this town because they can't afford it. Everything costs too much money. The town should have more free events.
- We need more promo for businesses and more tourist information.
- We need better marketing of local attractions. Local attractions should be promoted at the front desk of hotels.
- Our business does okay during the recession. Our business has a really good gauge of the economy.
- Beaver Boardwalk needs to get fixed naturally. A bike trail going to Jasper from Hinton. Biking is more and more popular and we need a dedicated bike trail between our communities. This would create more retail stores as well. If the town could do a bit more to make the trails bike friendly, and advertise them more that would be great. We would like a trail map (a bike trail map would be even better!). Property taxes were astronomical this year, our property taxes more than doubled. We are a home based business - and this will greatly affect us. In a time when we need to be a diversified economy, the government is shutting down things... this is not the time to be doing this. We should be doing something like what Jasper is doing with the local businesses. We need more specific tourist information for what's in the area.

- We need better signage - we can't even promote our businesses. Even if I wanted to, we can't promote the valley. A billboard is an invitation to stop - I can't even invite people. We can't ask them to stay or look. It does not work for the East Access. We need to do better. Hinton really lacks in their marketing of themselves. We don't tell our consumers anything. Where are the signs, where is the excitement. We need billboards, we need pictures, we need visuals. It's so simple but we are missing the mark. Where are all of the signs and pictures for these great things we have to do in our town. The loss of the tourism centre will create a large negative impact on our community. How is anyone going to know what's here? There are more signs coming out of Edson for Jasper.
- Need things to do for youth. There's also not a lot to do in town for oilfield workers, etc. We need more things to bring people to our town, and to engage the current residents.
- Would like to see more after hours meetings - business owners can not get away from their businesses during 9-5. There are lots of events I would like to attend, however I feel like I am unable to do so due to the times that they are being held.
- This is not the time for provincial government service cuts.
- We need to refurbish Beaver Boardwalk - it's a big highlight for our tourists - it's a great place to send our tourists. Signs at end of town - (blue) services offered - why are they blank? The Chamber should have an incentive for people to purchase or at the very least fill out the sign. When you drive to town and see something that says "Services Available" - and there is nothing there, it's a bad impression to our visitors. Lack of signage about our town is a deterrent. We need to showcase the amenities in our town. Tourism information is absolutely essential for our style of business. It's would be a good idea to share the tourist space with local artists - shared space, shared staffing.
- Bylaw does not enforce enough. We are the only company in our sector that follows the rules - it makes it difficult for us because there are more expenses involved and we are competing with people who don't have such expenses.
- We are not Jasper - we need to promote the outdoor lifestyle life that Hinton offers. We are so unique but we often get lumped in with Jasper. There is a lot of things that you can't do in Hinton that you can't do in Jasper because of the rules and regulations associated with the park. Our lakes aren't advertised, therefore they aren't utilized (not main lakes, but areas like Cache Lake, and Graveyard Lake). McLeod River, Mountain Bike Trails etc. Need to be advertised more. Our town needs a more positive spin and a more positive note. Need camping. Disconnect between valley and hill business - feels like we have 2-3 separate communities. Roadside signs need to advertise the valley

district more. We need more community events shared between hill and valley. The FOHN festival is on the top of the hill - it would be great to be indoor - perhaps at the rec centre? Weather doesn't always cooperate which makes it difficult. More things need to be shared - we need to unite as businesses. Need to be more active business community events for youth. A lot of families can't afford to put kids through hockey, or expensive sports - need more programs to give kids with less resources to participate in. Need more activities for young adults. An escape room would be amazing. I want to help businesses with fundraising - be more of a community asset. It's very hard for small business in this province to find help for start up costs. There should be more grants and programs available. Even with a 1 year grace period (ie I've been in business for 1 year - now I can apply. Industry is unstable in Hinton right now which is really scary for the business community. We need to attract more people to our community that isn't reliant on industry. Businesses need to partner more with each other.

- We have foreign workers that are on a limited budget, and don't always have the resources to go to our local attractions so that they can better promote it to our visitors. We would like to see more collaborative projects that include our workers so that they can help promote the community that we live in. Air bnb's make it really difficult to succeed in the hotel industry - we wish that there were more rules and regulations surrounding their business model, because we have to adhere to these rules. We need to look at the way we are dealing with Travel Alberta. When I go away traveling, I drive around and see what types of things to do based on advertising. TA is too formal - I don't feel like we sell Hinton enough. It would be nice to have a trade show style event for tourism business that would be internal only - so we know how to promote each other. There is such a disconnect between what we have, and what we know we have. Marketing our town is really lacking - We have a lot to offer tourists. A lot of people come up here to film wildlife, but we don't promote that in any way. It would be nice to have a campaign that helped connect these people with our marketing. Tourists take amazing photos here and they hang them on their walls, share with friends. It would be really nice to have a social media campaign that promotes these artists and our community at the same time. It would be great marketing. A local photo contest would be amazing.
- Recycle and compost - look at program in Didsbury, Alberta - they have an amazing program. We should adopt something similar to their program. We need to compost, recycle, and have a better impact on our environment. Give consumers a reason not to fill their garbage bins beyond capacity. If we give them the tools to be successful, they will be. We need to empower our business consumers to do better.

- The most important things to us are the services that are available to our employees regarding mental health, community service supports, see those services developed and marketed to the community that needs them. Create more awareness for people. Given the pay grade that employees are at, making things more attainable to the employees.
- All government bodies should be working collaboratively to build the area up, and be creative in how to do that so Hinton is not just seen as... our marketing is gateway to the Rockies. We need to focus more on what we have here - get the Jasper traffic.
- Substance abuse is a big issue in Hinton. We see it a lot in our industry. It's tough for people to find work - locals are not always hired. People have to go all the way to the city for certain medical treatments and appointments. The roads are awful for low income housing. The town spends too much money on hill while neglecting valley businesses. Food is too expensive for the average person. A lot of places are renting to high income people in the industries in town, and the lower income people get neglected and can't afford it. We need a bigger police presence in our town - there is way too much theft, and substance abuse issues. Companies take advantage of worker's rights and safety issues are being neglected. When OH&S does investigations, they often check up on bigger industries instead of checking in with retail locations. Fines are not high enough when environmental issues arise within bigger corporations (ie the mill).
- There needs to be more things to do in town, especially for a younger crowd - (ie young adults just starting out). There's only seedy bars, and things that promote drinking. It would be nice to have a place for 20-30 somethings to be social without alcohol. Other towns have better facilities like rec centres, we need those types of places too.
- The community needs to figure out the housing situation as the tourism industry gains momentum. Lack of housing options for service industry salaries is an issue. Hinton has a real opportunity to be a tourism destination as we have many of the same advantages of Jasper, without all of the rules and regulations. This is the last option before the Rockies.
- I feel as though our Chamber does not support and promote small, local business. I don't feel as though the town encourages locally owned and operated businesses. There are a lot of rec activities that are not promoted, as I feel like the locals do not want to share it. Example: Mountain Bike Park, Disc Golf. With the closure of the beaver boardwalk, we have lost a major tourism destination in our community. We need to better promote the activities and locations that we do currently have in our community.

- Collective marketing would be great, and a town run tourism directive. Town funded would be great as well. A marketing fund would be ideal for a destination marketing fund for all of our collective marketing.
- I don't feel that our Town or our Chamber works to promote local businesses enough. It seems as if there is a complete disconnect between the Town and the businesses that keep the community thriving. It appears that our Town is more about taxation revenue than creating a balanced business community. We suffer deeply from fast food-it is, that is, another fast food franchise seems to be opening every month. Too many restaurants, too many hotels, not enough to do in town. How about a plan to create a well rounded and balanced community? The Chamber promotes local business only when it suits them in their advertising efforts or for self serving needs, but doesn't seem to do much else. Not sure what our yearly fees go to except someone's wages. There is constant talk in the business community questioning what they do for us. Change is needed to create a healthier and vibrant community for business and visitors!

NEXT STEPS

A number of action items have been identified as next steps to this TIBRE project in Hinton:

- As needed, immediate issues were directly addressed with specific businesses as they were identified in the interview and appropriate follow up made.
- Reports and final analysis will be shared with the community and with contributing stakeholders in early May 2020.
- Community Futures West Yellowhead has received a CARES grant for projects related to creating new business opportunities for Hinton tourism industry beginning May 2020.
- An open house related to the TIBRE project will be rescheduled to September 2020 in recognition of the COVID-19 public health crisis.

APPENDIX A

LETTER TO BUSINESSES

Hinton Supporting Local Tourism Businesses with a Business Retention and Expansion Project

A community-focused economic development project to enhance tourism offerings and grow tourism businesses is beginning in Hinton. Local tourism related businesses are encouraged to participate in this important project.

The Tourism Industry Business Retention and Expansion Project (TIBRE) is designed to identify business retention issues and expansion opportunities for existing tourism businesses in targeted municipalities. The project involves the identification of existing and eligible tourism businesses and visiting them to assess their health and intentions. The project helps existing tourism businesses optimize their operations by identifying challenges and implementing solutions to help them grow.

“Through the Tourism Business Retention and Expansion Project, Community Futures West Yellowhead is aiming to show existing local businesses their importance to Hinton by asking them about their needs, future plans, and how they think the local tourism business environment could be improved”, said Helen Kelleher-Empey, Chair of Community Futures West Yellowhead Board of Directors.

Tourism is a driver of the economy in the community and provides an important source of employment for locals. Said Brian LaBerge, Hinton and Region Economic Development Coalition (HREDC) “We are pleased to support this important initiative in Hinton that will help grow our tourism industry.”

Business participation in this community economic development project is essential to its success. It will also strengthen collaboration between

tourism-focused organizations and the local business community to further develop tourism in the community.

The first stage of the project is to visit with Hinton tourism related business owners, which will be starting shortly and will be completed by December 21st. In the next few days, tourism businesses will receive a letter detailing how they can participate. Individual information and comments will be confidential, but aggregated information will be shared in a report to the community. Combined with other tourism research, the report will be a valuable resource to help solve local problems, plan for future tourism businesses, and promote the community.

The TIBRE project was piloted in Drumheller in 2018 and the response from business leaders and the community was very positive. Julia Fielding, Communications and Economic Development Officer, Town of Drumheller, said, TIBRE allowed Drumheller “to get more detail on the local tourism industry, what the issues were, and what we needed to do to support these businesses moving forward. The project was great, and the partnerships developed were fantastic. We really care about our businesses and how we can start moving forward getting more jobs and businesses in town.”

The Hinton TIBRE project is a partnership between Community Futures West Yellowhead and Alberta Tourism.

For more information, contact:

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General Manager

Community Futures West Yellowhead

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APPENDIX B

HINTON TIBRE SURVEY

TIBRE Survey - Hinton 2019

Instructions (only for interviewer)

1. Please have the firm sign the Informed Consent Agreement before initiating the survey.
2. Please ask each question exactly as worded. This is so that the answers can be compared. If you ask a follow-up question that isn't covered in the official survey, you can take some paper notes on the response.
3. Please inform the firm about ground rules: the information collected will be kept strictly confidential and only reported in an aggregate way and they can skip any question they do not feel comfortable answering throughout the survey.
4. Please note that depending on the answers from the firm, not all questions on the paper survey will be required. The survey link will skip some questions automatically depending on the answers so you do not have to worry about skipping questions.
5. DO NOT hit backspace on your browser - if you need to go to the previous questions to modify the response, please use the Previous and Next question buttons at the bottom of the survey page.

1. Please enter the business code for this survey. Please ensure the number is entered accurately to match your paper files.

TIBRE Survey - Hinton 2019

2. What is your position in the company?

- Owner Manager
- Partner Assistant Manager
- Other (please specify)

3. Which of the following best describes the nature of your business?

- Accommodation Retail
- Food and Beverage Transportation
- Recreation and Entertainment (*includes Attractions) Travel Services
- Other (please describe main products and services)

4. How long has the business been in operation?

- Less than 1 year
- 1 to 4 years
- 5 to 10 years
- More than 10 years
- Don't know

5. How long have the current owners owned the business?

- Less than 1 year
- 1 to 4 years
- 5 to 10 years
- More than 10 years
- Don't know

6. How is the business registered?

- Corporation
- Government-owned
- Not-for-profit
- Partnership
- Sole proprietor
- Don't know

7. Approximately what percentage of your business is attributable to tourism?

Percentage of business
attributable to tourism

0 100

8. Are you open for business all year round, i. e., 12 months a year?

- Yes
- No

9. If NO, what months of the year are you open for business?

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

TIBRE Survey - Hinton 2019

10. What days of the week are you open for business?

- | | |
|------------------------------------|-----------------------------------|
| <input type="checkbox"/> Monday | <input type="checkbox"/> Friday |
| <input type="checkbox"/> Tuesday | <input type="checkbox"/> Saturday |
| <input type="checkbox"/> Wednesday | <input type="checkbox"/> Sunday |
| <input type="checkbox"/> Thursday | |

11. What are your hours of operation each day? Enter opening and closing time for each day, for example, 9 am to 9 pm or leave blank for days you are closed.

Monday	<input type="text"/>
Tuesday	<input type="text"/>
Wednesday	<input type="text"/>
Thursday	<input type="text"/>
Friday	<input type="text"/>
Saturday	<input type="text"/>
Sunday	<input type="text"/>

12. Approximately how many of your visitors are local, that is, live within a travel distance of 1.5 hours? Please express as a percentage.

Percentage of visitors that
are local (within 1.5 hours
drive time)

0 100

13. Where do the majority of your **non-local** visitors come from? (Those who live more than 1.5 hours drive time away.)

- Alberta
- Domestic (other provinces/territories in Canada)
- International
- Don't know

14. Do you collect postal codes from your visitors?

- Yes
- No

15. PRIZM is a free program, offered by Alberta Economic Development, Trade and Tourism, which takes postal codes from your business and groups them into visitor types. This can help your business further understand your visitors. Would you be interested in obtaining more information about PRIZM?

- Yes
- No

16. A marketing plan details the necessary actions to achieve one or more marketing objectives. Does your business have a current marketing plan?

- Yes
- No

17. Do you receive market information, e.g., Alberta Market Monitor and/or trend information, about your industry?

- Yes
- No

18. How do you identify your customers' needs?

- | | |
|---|---|
| <input type="checkbox"/> Comment cards | <input type="checkbox"/> Marketing publications |
| <input type="checkbox"/> Complaints | <input type="checkbox"/> Sales calls |
| <input type="checkbox"/> Customer surveys | <input type="checkbox"/> Trade publications |
| <input type="checkbox"/> Focus groups | <input type="checkbox"/> Don't know |
| <input type="checkbox"/> Informal comments/feedback | <input type="checkbox"/> Not applicable |

19. Competitive analysis is an assessment of the strengths and weaknesses of current and potential competitors. Do you conduct a regular competitive analysis?

- Yes
- No

20. Competitive advantage is your strengths relative to your competition. What is the competitive advantage of your business?

- | | |
|---|--|
| <input type="checkbox"/> Branding | <input type="checkbox"/> Location |
| <input type="checkbox"/> Customer service | <input type="checkbox"/> Product variety |
| <input type="checkbox"/> Efficiency | <input type="checkbox"/> Don't know |
| <input type="checkbox"/> Other (please specify) | |

21. Do you need to expand, decrease or maintain your business offerings?

- Decrease
- Expand
- Maintain
- Don't know

22. A brand strategy creates a solid brand identity for your company which will differentiate you from the competition. Do you have a brand strategy?

- Yes
- No

23. How do you set the price for your products and/or services?

- Above market
- Below market
- At market
- Margin
- Don't know
- Not applicable

24. Do you have a wholesale price?

- Yes
- No
- Don't know

25. How do you promote your products and/or services?

- Business cards
- Email
- Flyers
- Newspaper/Community paper ads
- Radio ads
- Sponsorship
- Other (please specify)
- Trade shows
- Website
- Word-of-mouth
- Social Media
- Not applicable

26. Which industry marketing/trade show events do you attend?

- CanadaWest
- Rendezvous Canada
- Travel Alberta Industry Conference
- None
- Other (please specify)

27. A receptive tour operator is a local tour company that specializes in local tourism experiences and manages products and services for incoming visitors booked through international tour operators. Do you work with receptive tour operators?

- Yes
- No
- Don't know

28. Identify the areas you currently face major operational challenges in from the list below:

- | | |
|---|--|
| <input type="checkbox"/> Inventory management | <input type="checkbox"/> Production |
| <input type="checkbox"/> Purchasing | <input type="checkbox"/> Plant layout efficiencies |
| <input type="checkbox"/> Workplace health | <input type="checkbox"/> Equipment inefficiencies |
| <input type="checkbox"/> Overtime | <input type="checkbox"/> Energy use |
| <input type="checkbox"/> Research/Development | <input type="checkbox"/> Branch sales office |
| <input type="checkbox"/> Technological improvements | <input type="checkbox"/> Franchise issues |
| <input type="checkbox"/> Computer software | <input type="checkbox"/> Marketing |
| <input type="checkbox"/> Website development | <input type="checkbox"/> Risk management |
| <input type="checkbox"/> Electronic commerce | <input type="checkbox"/> None |
| <input type="checkbox"/> Transportation | |
| <input type="checkbox"/> Other (please specify) | |

29. Does your business own or lease the facility?

- Own
- Lease
- Not applicable

30. Do you anticipate any problems renewing the lease?

- Yes
- No

31. Which, if any, limitations exist with your current facility?

- | | |
|---|--|
| <input type="checkbox"/> Size | <input type="checkbox"/> Inadequate services/amenities |
| <input type="checkbox"/> Inadequate utilities | <input type="checkbox"/> Parking |
| <input type="checkbox"/> Energy consumption | <input type="checkbox"/> Taxation |
| <input type="checkbox"/> Geographic location | <input type="checkbox"/> Inadequate land for development |
| <input type="checkbox"/> Building condition | <input type="checkbox"/> None |
| <input type="checkbox"/> Other (please specify) | |

32. Is your business experiencing any location issues or barriers that impact productivity and/or competitiveness?

- | | |
|---|---|
| <input type="checkbox"/> Zoning regulations | <input type="checkbox"/> Signage |
| <input type="checkbox"/> Municipal permits | <input type="checkbox"/> Promotion of the municipality as a tourism destination |
| <input type="checkbox"/> Water/sewer capacity | <input type="checkbox"/> Access to suppliers |
| <input type="checkbox"/> Property taxation | <input type="checkbox"/> Availability of warehousing |
| <input type="checkbox"/> Road quality or access | <input type="checkbox"/> Waste disposal |
| <input type="checkbox"/> Transportation costs | <input type="checkbox"/> None |
| <input type="checkbox"/> Quality of life | |
| <input type="checkbox"/> Other (please specify) | |

33. Which of the following financial reports do you use to assist in making business decisions? Check all that apply.

- Balance sheet Income statement
 Cash flow None
 Other (please specify)

34. Do you conduct regular financial planning for your business?

- Yes
 No
 Don't know

35. Do you receive professional financial advice regarding your business?

- Yes
 No
 Don't know

36. Do you currently face challenges with any of the following? Check all that apply.

- Determining working capital position Collecting receivables
 Managing cash flow Securing short-term line of credit
 Liquidity Securing long-term line of credit
 Other (please specify)

37. In 2019, how many paid employees did you have in each of the following categories? Enter a number in each applicable category.

Full time	<input type="text"/>
Part time	<input type="text"/>
Contract	<input type="text"/>
Family members	<input type="text"/>
Working owners	<input type="text"/>

38. Seasonal employees are hired for busy period and usually laid off once the busy period is over. In 2019, how many seasonal employees did you have in the following categories?

Full time

Part time

TIBRE Survey - Hinton 2019

39. What were your average biweekly payroll costs (excluding owners' salaries) during the last winter season (October 2018 - April 2019)?

TIBRE Survey - Hinton 2019

40. In 2019, what were your average biweekly payroll costs (excluding owners' salaries) for the summer months (May - September)?

TIBRE Survey - Hinton 2019

41. In 2020, do you expect to increase, maintain or reduce the number of full time and part time employees (permanent and seasonal) you have on your payroll?

	Increase	Maintain	Reduce	N/A
Number of permanent full time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of permanent part time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of seasonal full time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of seasonal part time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

42. How many vacant positions are there at your business at this time?

- None
 - One
 - Two
 - Other (please specify)
 - Three
 - Not applicable
-

43. How do you recruit new employees?

- Newspaper/Community newspaper ad
 - Employment agency
 - Local college/school
 - Internet
 - Other (please specify)
 - Personal/business networks
 - Word-of-mouth
 - Not applicable
-

44. Overall, does your business have difficulty retaining employees?

- Yes
- No
- Not applicable

45. For which positions?

Front line

Management

Supervisory

Other (please specify)

TIBRE Survey - Hinton 2019

46. How are employee, supervisory and management training needs determined in your business?

Mandatory requirements

Performance reviews

Employee requests

Don't know

Management decisions

Not applicable

Other (please specify)

47. Do you, your employees or management staff require training?

Yes

No

Not applicable

TIBRE Survey - Hinton 2019

48. In what areas is training needed? Check all that apply.

- | | |
|---|---|
| <input type="checkbox"/> Cash handling | <input type="checkbox"/> Merchandising and displays |
| <input type="checkbox"/> Communication | <input type="checkbox"/> Safety and security |
| <input type="checkbox"/> Customer service | <input type="checkbox"/> Supervisory skills |
| <input type="checkbox"/> Visitor Friendliness | <input type="checkbox"/> Food and beverage handling |
| <input type="checkbox"/> Marketing | |
| <input type="checkbox"/> Other (please specify) | |

TIBRE Survey - Hinton 2019

49. What are the best formats for most training in your business? Check all that apply.

- | | |
|--|--|
| <input type="checkbox"/> In-house training by supervisor or in-house trainer | <input type="checkbox"/> Online training |
| <input type="checkbox"/> In-house training by an outside trainer | <input type="checkbox"/> Self-directed study |
| <input type="checkbox"/> Off-site training in local community | <input type="checkbox"/> Not applicable |
| <input type="checkbox"/> Off-site training in nearest major centre | |
| <input type="checkbox"/> Other (please specify) | |

50. In your business, do you currently have:

	Yes	No	Not applicable
Job descriptions for all positions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An employee policy manual	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An employee incentive program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

51. What is the average annual revenue of your business?

- | | |
|--|--|
| <input type="radio"/> Less than \$100,000 | <input type="radio"/> \$500,000 to \$999,999 |
| <input type="radio"/> \$100,000 to \$249,999 | <input type="radio"/> \$1 million to \$5 million |
| <input type="radio"/> \$250,000 to \$499,999 | <input type="radio"/> More than \$5 million |

52. What are your sales projections for the current fiscal year as compared to last year?

- Higher Don't know
 About the same Not applicable
 Lower

53. During the past 3 years, what has been your total gross dollar sales trend?

- Increasing Don't know
 Decreasing Not applicable
 About the same

54. In 2019, did the following business factors increase, stay the same or decrease?

	Increase	Stay the same	Decrease	Don't know	Not applicable
Number of visitors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales - total revenues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Profits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

55. If you answered **increase** to any of the above, please identify possible reasons for the increase(s) from the list below:

- Better business practices
 Improved economy
 Higher prices/fees
 Increased awareness of business
 Marketing activities
 More visitors
 More events
 New/improved products and services
 Good weather
 Not applicable
 Other (please specify)

56. If you answered **decrease** to any of the above, please identify possible reasons for the decrease(s) from the list below:

- More competition
- Construction
- Poor economy
- Fewer visitors
- Forest fires
- Increased costs/taxes
- Depressed oil and gas industry
- High price of gas
- Poor weather
- Not applicable
- Other (please specify)

57. Based on your knowledge to date and observed trends in your business, do you expect the following business factors to increase, stay the same or decrease in 2020?

	Increase	Stay the same	Decrease	Don't know	Not applicable
Number of visitors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sales - total revenues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

58. If you answered **increase** to any of the above, please identify reasons you expect the increase(s) from the list below:

- Better business practices
- Improved economy
- Higher prices/fees
- Increased awareness of business
- Marketing activities
- More visitors
- More events
- New/improved products and services
- Good weather
- Not applicable
- Other (please specify)

59. If you answered **decrease** to any of the above, please identify reasons you expect the decrease(s) from the list below:

- More competition
- Construction
- Poor economy
- Fewer visitors
- Forest fires
- Increased costs/taxes
- Depressed oil and gas industry
- High price of gas
- Poor weather
- Not applicable
- Other (please specify)

60. A business plan is a formal statement of a set of business goals, the reasons why they are believed attainable, and the plan for reaching those goals. Does your business have a current business plan that is used to guide operations?

- Yes
- No
- Don't know

61. A succession plan includes the process of: (a) identifying and preparing employees to fill key positions within an organization before the positions are vacant and/or (b) planning for transfer of ownership. Does your business have a succession plan for:

	Yes	No	Don't know	Not applicable
Employees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ownership	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

62. Are you planning to expand your business in 2020 or 2021?

- Yes
- No

TIBRE Survey - Hinton 2019

63. What will your expansion lead to?

- An increase in workforce
- An increase in floor space
- Additional product lines
- Additional services for customers
- Other (please specify)
- Additional investment in equipment and technology
- Importing goods and services to Canada
- Exporting goods and services

TIBRE Survey - Hinton 2019

64. Are you planning to downsize, close or sell your business in 2020 or 2021?

- Yes
- No

TIBRE Survey - Hinton 2019

65. If you are downsizing, closing or selling, which of the following are influencing your decision at this time?

- Changing market conditions
- Declining population
- Lack of support from local/provincial/federal organizations
- Retirement
- High property taxes
- Another business opportunity
- Other (please specify)

TIBRE Survey - Hinton 2019

66. Do you plan to continue operating your business at its current state and capacity?

- Yes
- No

TIBRE Survey - Hinton 2019

67. Which of the following reasons are influencing your decision?

- Business is at capacity and does not require an expansion Current economic climate
- Inadequate financial return on improvements/investments Increased costs
- Seasonality of business
- Other (please specify)

TIBRE Survey - Hinton 2019

68. Are you planning to relocate your business in 2020 or 2021?

- Yes
- No

TIBRE Survey - Hinton 2019

69. If you are relocating the business, are you considering moving away from your current town or moving within your current town?

- Moving away from current town
- Moving within current town

TIBRE Survey - Hinton 2019

70. Are you interested in pursuing opportunities or addressing challenges in collaboration with other businesses in any of the following areas?

	Yes	No	Not applicable
Cooperative marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product or service distribution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Joint staff training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff sharing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Group purchasing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equipment sharing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

71. Which of the following do you consider an advantage or disadvantage to doing business?

	Advantage	Disadvantage	No difference	Not applicable
Cooperative marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Product or service distribution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Joint staff training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff sharing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Group purchasing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equipment sharing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

72. Did you experience any of the following barriers to opening your business? Check all that apply.

- Lack of serviced land
- Resistance from local business
- Lack of proactive business recruitment
- Availability of properly zoned and designated land
- Slow approval process
- Levies on expansion
- High taxes
- Other (please specify)
- Inadequate labour supply
- Inadequate transportation
- Availability of space for rent or lease
- Cost of land or rent
- Market size
- Volatile economy

73. Are there any services that would be beneficial to you or your employees living in the community in addition to what is already here?

- | | |
|---|---|
| <input type="checkbox"/> Dining | <input type="checkbox"/> Financial services |
| <input type="checkbox"/> Entertainment | <input type="checkbox"/> Housing availability |
| <input type="checkbox"/> Professional services | <input type="checkbox"/> Recreation |
| <input type="checkbox"/> Retail services | |
| <input type="checkbox"/> Other (please specify) | |

74. In your opinion what services are needed to enhance the visitor experience in the area? Check all that apply.

- | | |
|---|--|
| <input type="checkbox"/> Accommodation | <input type="checkbox"/> Attractions |
| <input type="checkbox"/> Dining | <input type="checkbox"/> Recreation |
| <input type="checkbox"/> Entertainment | <input type="checkbox"/> Tourism Information |
| <input type="checkbox"/> Other (please specify) | |

TIBRE Survey - Hinton 2019

On a scale of 1 to 10, where 1 is "completely disagree" and 10 is "completely agree", please rate how much you agree with the following statements:

75. Your community supports tourism businesses.

Completely disagree									Completely agree	N/A
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

76. It is easy to find, recruit and retain good quality staff.

Completely disagree									Completely agree	N/A
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

77. I would like to work with our local government to create promotional pieces for our town.

Completely
disagree

Completely
agree

N/A

<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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78. Do you have any additional comments to add?

Thank you for participating in this interview.