



Business Survey Results ~ 2012

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Executive Summary

On April 3, 2012, a survey invitation was sent to 1,500 randomly selected Saanich businesses, asking them to share their ideas and opinions about Saanich as a place to do business, and how their municipal government could best serve their needs. Invitations were distributed as 1,000 sent by mail and 500 by email. By the April 13, 2012 response deadline, we had received 331 completed surveys and 31 undeliverable notifications, giving us a response rate of 22.5%, and low sampling error of $\pm 5\%$, 19 times out of 20.

A similar survey sent to Saanich citizens in January, 2012 received a 29% response rate and has been reported separately and is available on www.saanich.ca. Both sets of results will be used to guide planning and decision making.

The main body of this report contains a brief narrative analysis of each significant section of the survey, followed by selected figures and tables showing the most relevant or interesting segments of the available data. For all sections of the survey, more complete figures, including results broken down into demographic sub-groups such as size of business or area, are available in Appendix III. The actual wording and presentation of questions used in the original survey can be found in Appendix V.

The most significant results from each section of this report are briefly summarized here:

Vision and Values

- Several central themes – the most important concerns and priorities of business – emerge from analysis of the entire survey: transportation concerns; the economy; a desire for low taxes and the desire to be involved in how Saanich addresses business concerns.
- When asked to list the three biggest challenges facing Saanich in the next five years, businesses identified transportation concerns and taxes above all others.

Doing Business in Saanich

- Business owners believe that Saanich is a good place to live and conduct business, despite concerns about the local economy.
- Transportation for customers and staff, as well as keeping taxes and fees low is seen as being challenges that Saanich will face.

Service Delivery

- Satisfaction with services provided by Saanich is high.
- Business owners would like easier access to services, an improvement in how Saanich involves business owners in governance decisions, and improved transportation systems for customers and staff.

Paying for Services

- Transportation, sanitary sewer system and environmental protection capital projects should be a focus for Saanich
- The level of services should be maintained, with either the same amount of taxes or a decrease in taxes.
- Government should rely less on property tax and borrowing, more on user fees and government grants.

Technology and Collaboration

- Business owners acknowledge that there will be technology challenges facing them over the next two to three years, and that having the knowledge about which technology options are the best for their business is their primary challenge.
- Business owners are interested in possibilities for collaboration with other business owners in Saanich.

Background, Objectives and Methodology

The 2012 survey project used a similar approach as that used in previous surveys targeted towards business and citizens in Saanich conducted in 2003, 2006, 2009 and earlier in 2012. Readers are encouraged to read all survey results for their own interest; however caution should be exercised when comparing the results of the previous reports with the current Business survey results. The differences among these studies have not been statistically tested to determine whether they are significant.

Survey Objectives

1. Obtain an assessment of business perceptions of service delivery availability and quality.
2. Provide business input to municipal financial planning.
3. Gather business owner feedback on municipal public involvement processes.
4. Provide business owner input to the municipality's annual strategic planning process.
5. Gather business owner feedback about current and future information technology issues.

Methodology

The 2012 Business Survey was sent to 1,500 randomly selected Saanich businesses on April 3, 2012. Of those surveys mailed out, 31 were returned as undeliverable, giving us a total of 1,469 valid survey recipients. Responses were due by April 13, 2012, by which time, 331 completed surveys had been returned. This translates to a 22.5% response rate. Response rates for surveys of this kind are typically between 25% and 40%.

Based on a sample size of 331, our sampling error (also called "margin of error") is plus or minus 5%, 19 times out of 20, which means that 95% of the time, these survey results will vary $\pm 5\%$ from the results obtained if every individual business in the District of Saanich were surveyed. Subgroups like number of employees or location of business can be analyzed, although because they contain fewer respondents than the total, the size of the sampling error may increase.

Although responses to many of the questions were made on a 5 point scale with 5 representing the best rating and 1 the worst, most of the results in this summary report the percentage of responses that indicate a positive response to the question – where respondents provided a score of either 4 or 5 on a scale of 5.

No statistical reweighing of results was done to precisely match the demographic characteristics of survey respondents with those of the population. Demographic differences between the sample and the population were judged to be not significant enough to warrant the additional time and expense required for statistical reweighing.

In almost all questions, results are provided for each demographic group, allowing survey readers to make their own judgements on the differences present between sub-groups. The sample is underrepresented by respondents operating businesses with more than 4 employees. See Appendix I for demographic data.

For more information on methodology, see Appendix II.

Background, Objectives and Methodology

Acknowledgements

The 2012 Business Survey would not have been successfully completed without the special efforts and gratefully received assistance from:

- District of Saanich staff, especially Finance Staff during instrument development and David Izard during random sampling. Brian Vatne assisted with database design and statistical analysis.
- Dr. Brent Mainprize from the Faculty of Management at Royal Roads University guided the Business Survey work in 2006 upon which this methodology is consistently based.
- Most importantly, special thanks to those business owners who took the time to carefully complete and return their surveys.

Brief Survey Results

Vision and Values

A thematic analysis of the entire survey reveals a reasonable approximation of community vision and values. Several themes – issues or areas critical to businesses – emerge from the survey:

- transportation issues such as congestion, public transit, sidewalks and bike paths;
- concern over the pressures of an uncertain economy;
- a desire for low taxes; and
- a desire for business to be involved in government decision making.

Doing Business in Saanich (Question #1, #2 and #6)

This set of questions reveals that business owners perceive Saanich as a good place to live and do business, despite the percentage of business owners who believed that the local economy is not very strong. The survey did not reveal the nature of why business owners felt the local economy is not as healthy as it could be, but this result is not a surprise considering recent national and global economic instability. Despite the fact that some factors may be out of Saanich’s control, respondents have indicated in question #2 that there are several things that Saanich could do to improve the business environment.

Survey respondents were asked to indicate on a five-point scale, their opinion on the business environment in Saanich. Results indicate that business owners believe that the overall quality of life in Saanich is good, but less than two-thirds of business owners believe the local economy is healthy as shown in the chart below.

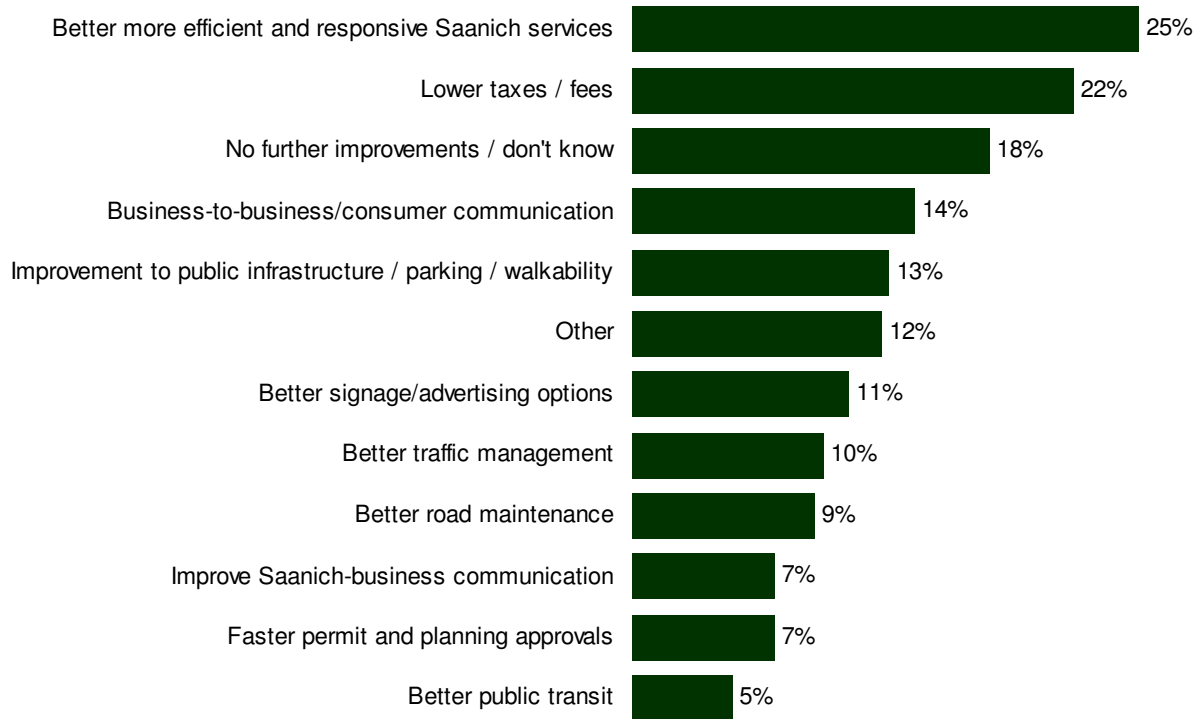
Quality of the Saanich business environment (% Good or Very Good)



Survey respondents were asked to indicate three things that Saanich could do to improve business owner’s ability to conduct business in Saanich. Respondents were given an opportunity to provide an open-ended response to the question. Appendix IV at the end of the report shows how these responses were categorized for the following chart displayed. The results indicate that business owners believe that more efficient and responsive services from the District of Saanich and lower fees and taxes would be the most effective methods to improve the ability to conduct business. Other common responses indicated that Saanich could do more to promote effective transportation and improve Saanich-business and business-to-business communication.

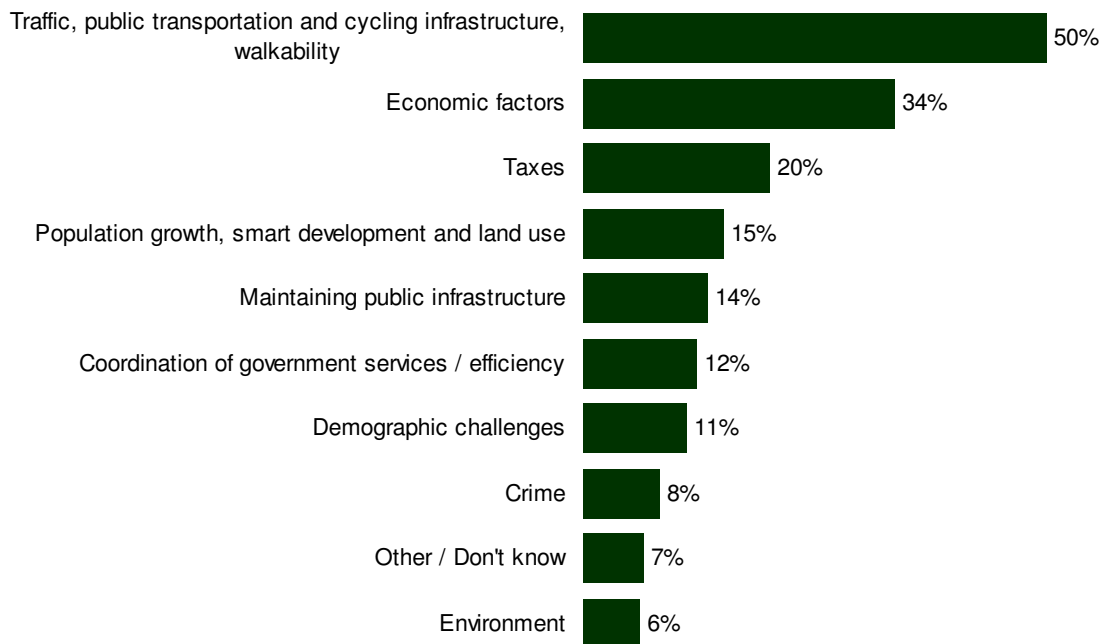
Brief Survey Results

Ways to improve the ability to conduct business in Saanich



When asked what challenges that business owners believe Saanich will face in the next five years from a business owner's perspective, results confirmed that the challenges will be transportation, taxes, and efficient government services.

Challenges facing Saanich in the next five years from a business perspective



Brief Survey Results

Service Delivery (Questions #3a, #3b, #4, #5 and #8)

The responses to this grouping of questions suggest very positive perceptions of the quality of service delivery in Saanich. Business owners are happy operating a business here, are satisfied with the services they receive from Saanich employees and are comfortable with the direction the local government is taking. However, there are a number of areas that could be addressed by Saanich that include, making it easier to access services, improving how Saanich involves business owners in governance decisions and in improving transportation for customers and staff.

Respondents were asked several questions about the most recent service experience they received from a Saanich employee. For each question, business owners were asked to respond on a 5-point scale, to what extent they agreed with a statement, and then how important this service was. For example, as shown in the chart below, 80% of respondents were satisfied while the importance level on the issue was 77%, for the statement, “When I last received service from Saanich I was treated fairly”.

Satisfaction with and importance of services provided by Saanich



Brief Survey Results

Perceptions of satisfaction with transportation for customers and staff scored lower than perceptions of public safety. Services such as policing, fire services and fire safety/inspections all are perceived as being important and respondents were satisfied with these services. However, there was a gap between the level of importance of crime prevention programs and satisfaction with these services. Respondents were satisfied with the ease of travel by car in Saanich, but just over half were satisfied with ease of travel by bicycle. In general, satisfaction with transportation in Saanich could be improved.

The survey results provide a specific detailed assessment of 12 local government services. Each question provides slightly different information, one on service quality, and the other on service availability and appropriate resource allocation. These two ratings can then be plotted onto a graph which shows four quadrants:

QUADRANT #1 (lower left): Low Satisfaction – Low Importance: Services in this quadrant may suffer from low awareness of their availability or benefits by the general population, or may offer the opportunity for resource reallocation.

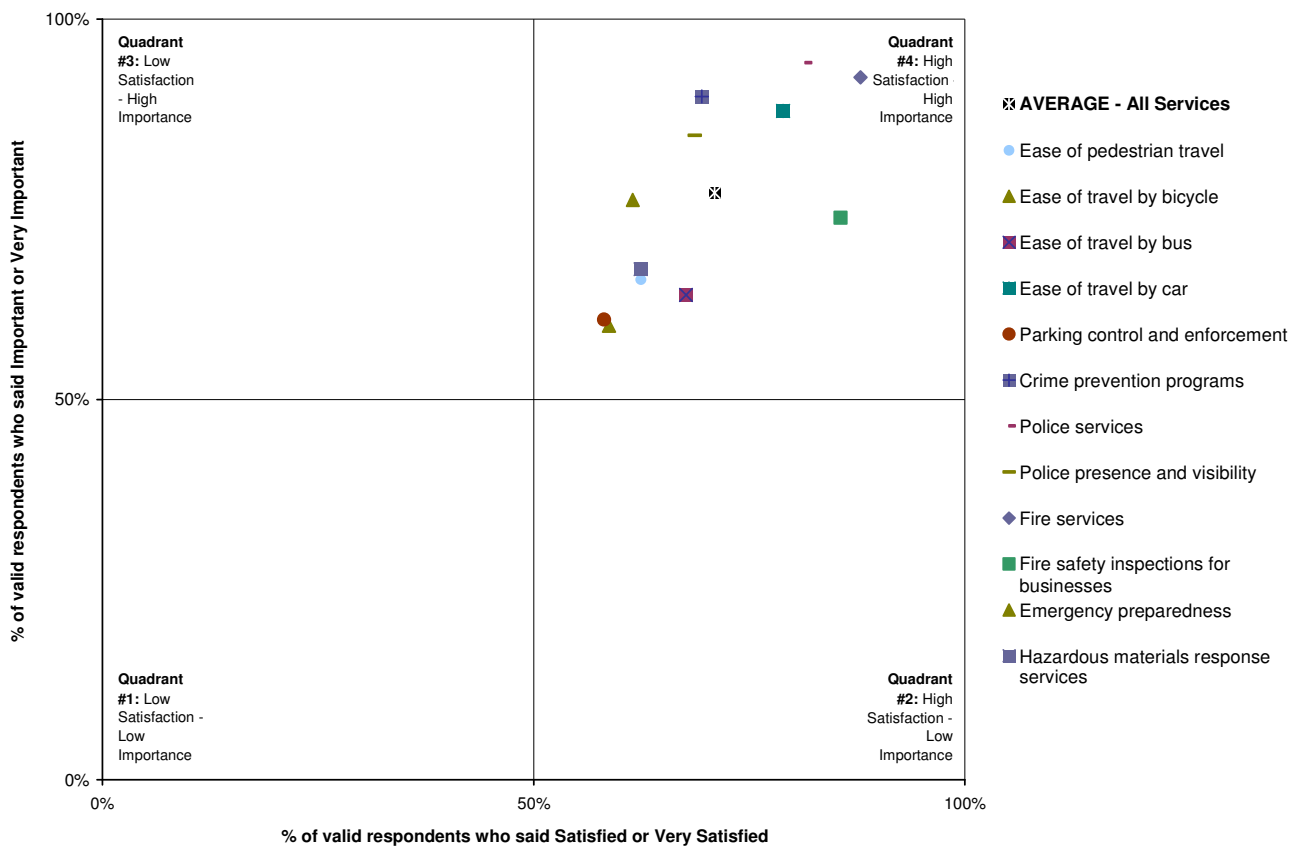
QUADRANT #2 (lower right): High Satisfaction – Low Importance: These services may require little attention or may even offer an opportunity for resource reallocation.

QUADRANT #3 (upper left): Low Satisfaction – High Importance: These services may require more municipal resources, better management of existing resources or a new approach to service delivery.

QUADRANT #4 (upper right): High Satisfaction – High Importance: Services in this quadrant largely meet current taxpayer expectations, both in terms of quality and resource allocation.

The satisfaction and importance results are shown below, indicating that all listed services are in quadrant 4. Therefore the majority of local government services are meeting or exceeding taxpayer expectations in terms of quality and resource allocation. Detailed data is available on page 37.

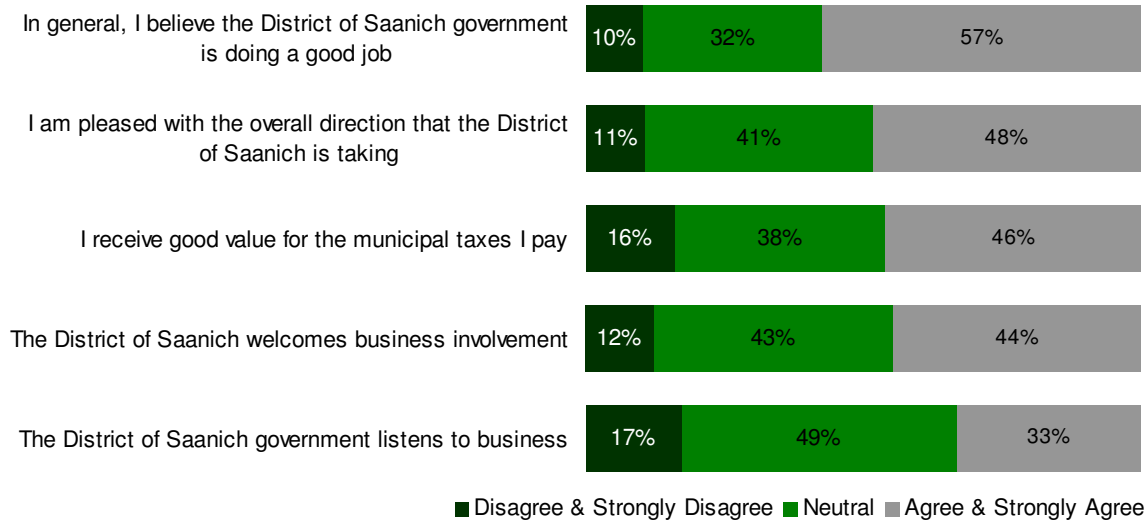
Satisfaction versus importance for transportation and public safety



Brief Survey Results

Survey respondents were asked to rate on a five-point scale whether they agree with the statements being presented about governance in Saanich. The chart below displays the percentage of respondents who chose the two highest points on the scale, the neutral point and the two lowest points on the scale.

Quality of municipal governance (% Good or Very Good)



These results indicate that while a majority of respondents believe that the government of the District of Saanich is doing a good job – there is more that can be done to listen to business and involve business owners in decision making.

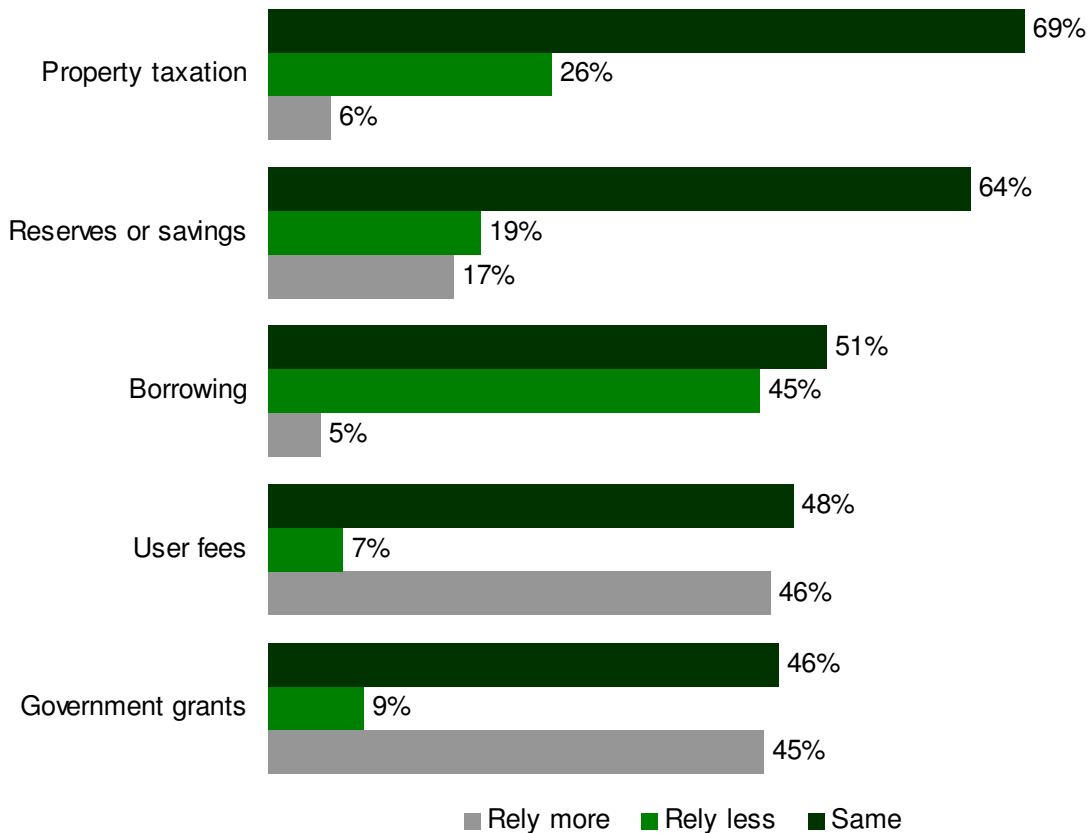
Brief Survey Results

Paying for Service Delivery (Questions #7, #9 and #10)

Three questions were used to get an indication of where Saanich's spending priorities should be and how these priorities should be funded. Respondents indicated that transportation, sanitary sewer system and environmental protection capital projects should be a focus, while the level of services should be maintained, with either the same amount of taxes or a decrease in taxes. Also, government should rely less on property tax and borrowing, more on user fees and government grants.

Businesses were asked to indicate whether Saanich should rely more, less or the same amount on five revenue sources.

Reliance on revenue sources (% respondents)

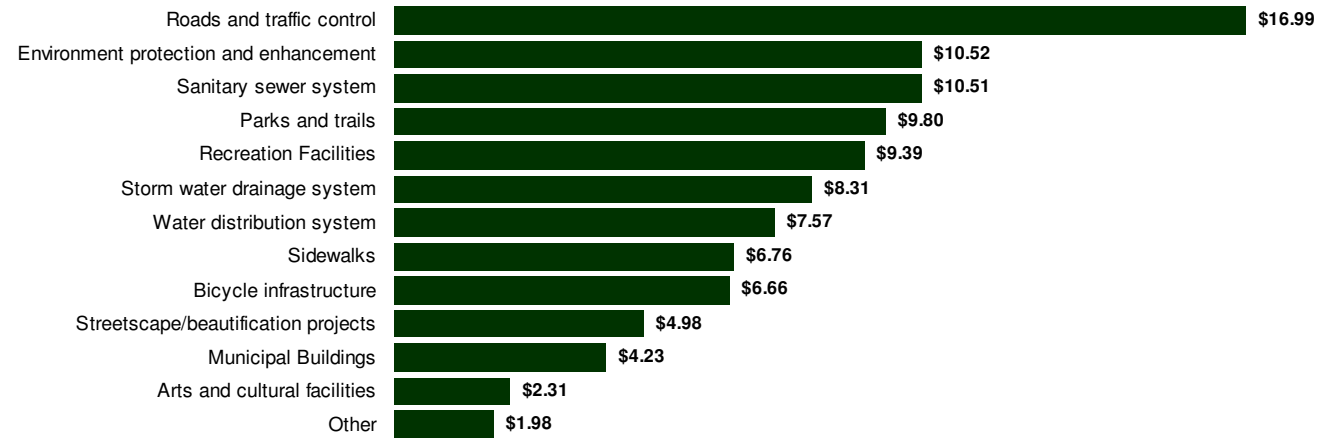


The results indicate that in general, respondents believe that Saanich should rely less on borrowing and property taxation and more on government grants and user fees.

Brief Survey Results

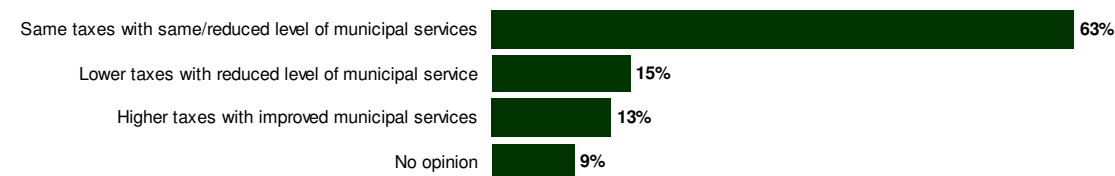
When asked how they would spend \$100 on a list of capital projects, businesses say they would spend the most on transportation infrastructure, the sanitary sewer system and on environmental protection and enhancement.

Where to spend \$100 on capital projects (Average \$)



Business owners were asked to indicate what they would advise Council to do if they had to choose three general policy options. Also, respondents were allowed to indicate that they had no opinion on this question.

If faced with realistic choices, what you advise Council to do? (% respondents)



Almost two-thirds of business owners indicated that they wanted to maintain the same or reduced level of services for the same amount of taxes. There were almost an equal percentage of respondents that either indicated they wanted less service and lower taxes, or more services and higher taxes.

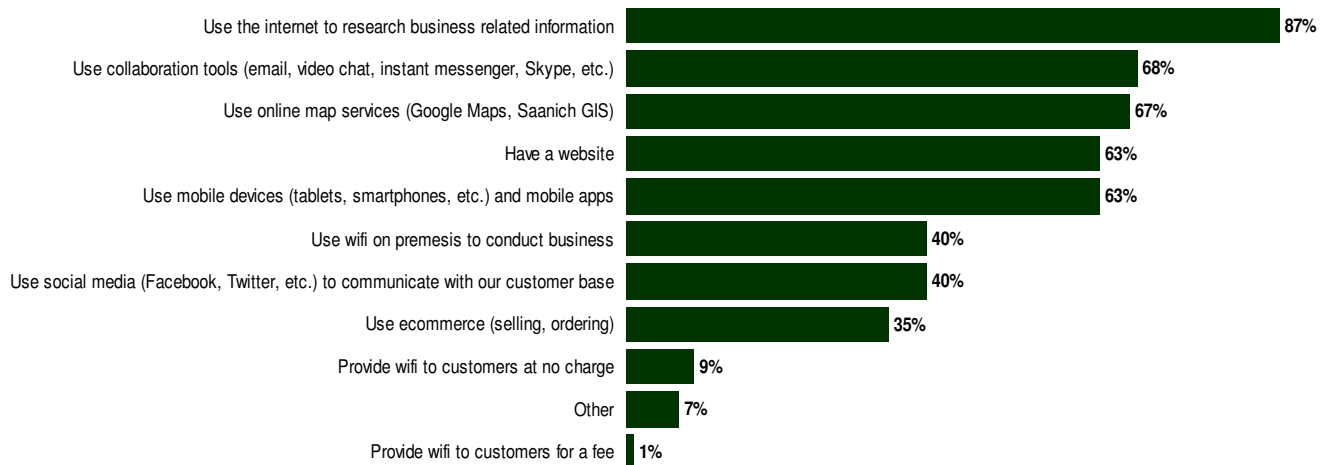
Brief Survey Results

Technology and Collaboration (Questions #11, #12, #13, #14 and #18)

Respondents were asked questions about the importance of computer technology to their business, and their level of interest in collaborating with other business owners in Saanich. The answers indicate that business owners acknowledge that there will be some technology challenges facing them over the next two to three years and that having the knowledge about which technology options are the best for their business is their primary challenge. The results are not conclusive that there is a big role for Saanich to play in addressing this challenge, other than to consider providing free WiFi services to the public.

Business owners have indicated that they are open to pursuing possibilities in communicating and collaborating with other business owners in Saanich.

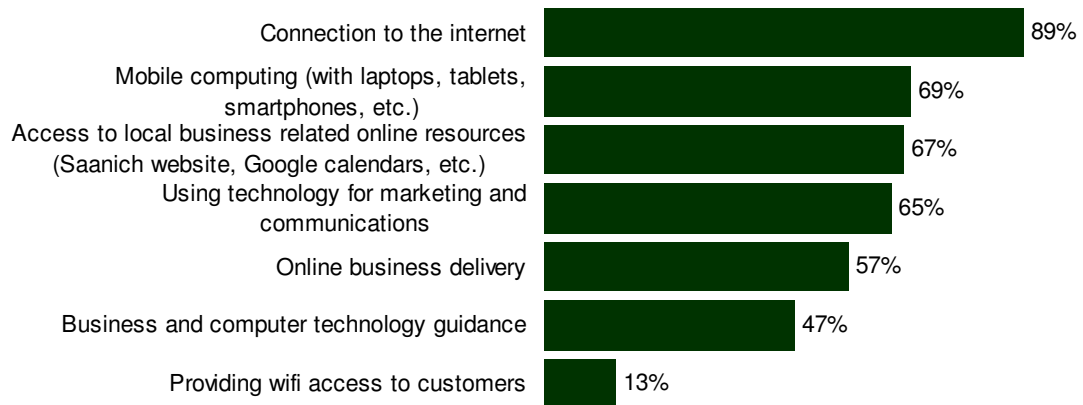
Technology products and services currently used by businesses



Brief Survey Results

Business owners were asked to indicate how important seven different computer technology options will be to their business over the next 18 months. With each option presented to respondents, except for one, about 50% or more indicated that they would be important to their business. Almost 90% of business owners indicated that connection to the internet will be important, and about two-thirds of respondents noted that mobile computing, access to local resources and using technology for marketing and communications would be important to their business.

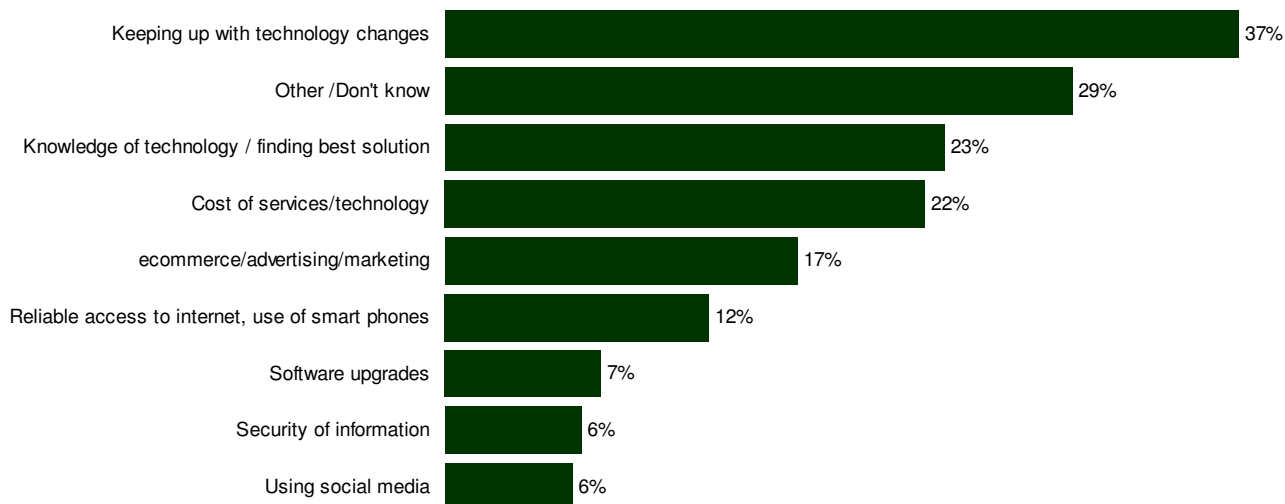
Technology importance to business in the next 18 month ratings (% Important or Very Important)



Brief Survey Results

Business owners were asked to provide an open-ended response about what they saw as being the three greatest challenges that their business will face in the next two to three years with respect to computer technology. Appendix IV at the end of the report shows how these responses were categorized for the chart displayed below.

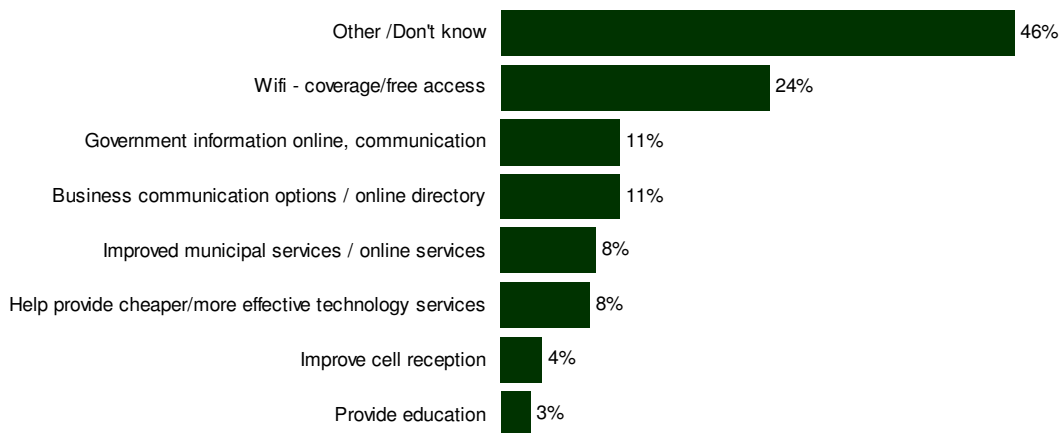
Three greatest challenges business will face with technology in the next 2-3 years



Business owners indicated that keeping up with technology, and being able to find the best solution to meet their needs will be the biggest change that they face.

Respondents were also asked about what Saanich could do in the area of technology to help business. Respondents were asked to provide up to three ideas, and were allowed to give an open-ended response to this question. Appendix IV at the end of the report shows how these responses were categorized for the chart displayed below.

What Saanich can do to help your business in the area of technology (% Respondents)



It is important to note that there were a high number of respondents who were unsure about what Saanich could do to help with technology, and others indicated that they felt that it should not be Saanich's role to help. The most commonly cited thing that Saanich could to help with technology is to provide free wifi access to the public.

Brief Survey Results

Business owners were asked to provide an indication on a 5-point scale about their level of interest in collaborating and communicating with other businesses in Saanich – and were asked about six different options.

Interest level in each of the following (% Interested or Very interested)

