

ALBERTA PERSPECTIVES SURVEY

MUNICIPAL RED TAPE AND BUSINESS SUPPORTS

OCTOBER 2024

MUNICIPAL RED TAPE AND BUSINESS SUPPORTS

This is the sixth survey in the Alberta Perspectives Series to focus on the issues of red tape and business supports.

Surveys on these issues take place at regular intervals, with the first survey held in the autumn of 2019. This survey includes a wide variety of tracking questions that primarily explore perceptions of core economic and policy issues.

The ACC makes use of these surveys in a number of ways:

- Use the findings to broaden and deepen the evidence the ACC and local chambers can bring forward to articulate the perspectives of the province's business community;
- To reinforce ongoing advocacy efforts by undertaking regular province-wide efforts to gather, prioritize, and articulate perspectives of the business community on core economic and policy issues of relevance to municipal and provincial government leaders; and
- Make the research available to individual Chambers for their own use with local municipalities.

MUNICIPAL RED TAPE AND BUSINESS SUPPORTS

Methodology

Utilizing the Alberta Perspectives platform, the ACC sent an invitation with a link to the online survey to all member chambers across the province. Chambers then sent this invitation to their members. Other sources were also used to survey businesses, including non-chamber members.

A total of 401 participants completed the survey through this approach. As part of the survey, those affected by crime or had undertaken a renovation or expansion project were also asked to complete a few additional questions related to these issues.

This large number of responses allows the ACC to speak with authority about members' views, strengthening advocacy on behalf of Alberta's business community.

Those businesses responding to the survey self-identify as either a business, a not-for-profit organization or a public sector organization.

Surveying was undertaken between September 12th and October 6th, 2024.

MUNICIPAL RED TAPE AND BUSINESS SUPPORTS

Issues Explored

A number of the questions included in this survey on municipal red tape and business supports have been tracked since 2019, while other were added in subsequent years including 2024. The list of issues explored includes:

- Impact, frequency, and cost of crime on their business;
- Top priorities for candidates in the 2025 Alberta municipal election according to their business needs;
- Contact with elected officials and government agencies on issues related to sustaining or growing respondent's businesses;
- Levies/taxes/fees and their impact on business;
- Renovation or expansion projects and views of the municipal permit process;
- By-law and zoning compliance and their impact on businesses;
- Perceptions of their municipality as a place to do business;
- Increases in municipal franchise fees; and
- Rating of current level of detail and clarity of municipal budgets and financial statements.

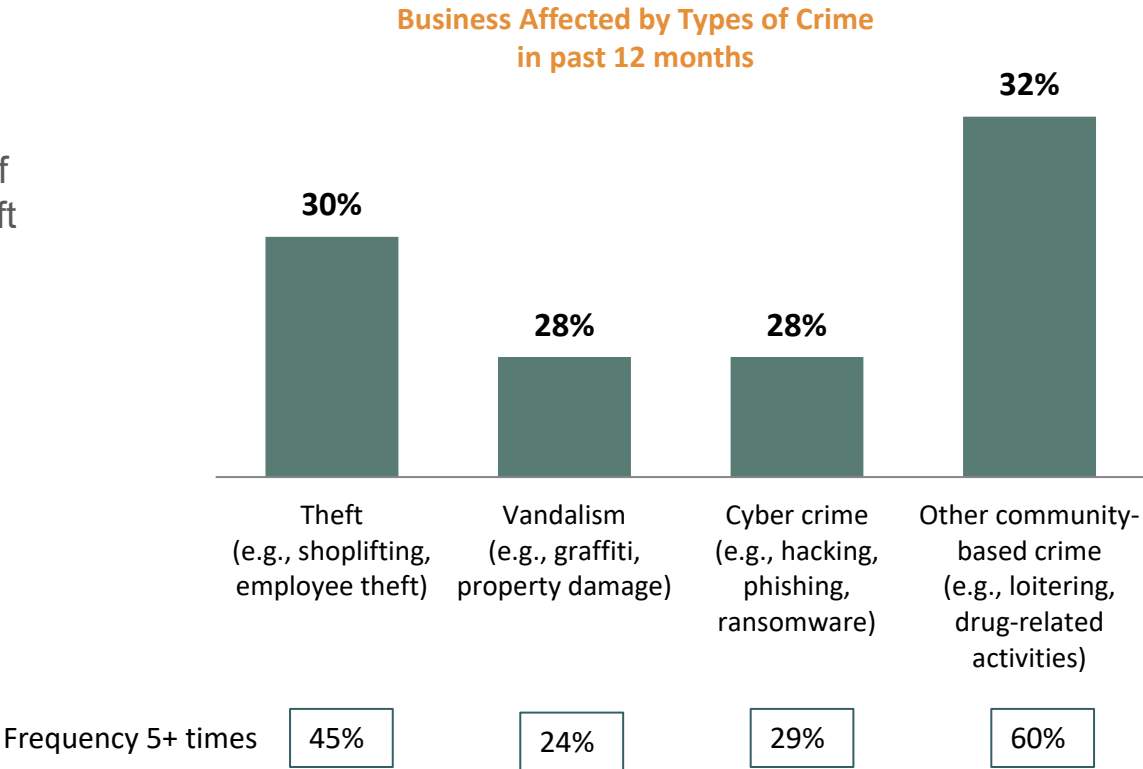
Cost of Crime for Businesses

Crime affects a majority of Alberta businesses.

Seven-in-ten businesses report being affected by some type of crime in the past 12 months. They are most likely to report theft (30%), vandalism (28%), cyber crime (28%), or other community-based crime such as loitering or drug-related activities (32%). Many of these crimes are not isolated incidents and appear to occur with some frequency.

On top of the financial losses from these crimes, over half (58%) indicate they have had to invest money to protect their business from crime or cyber attacks in the last year.

While the mean amount spent was \$4,909, one-in-five businesses (21%) report spending \$10,000 or more.



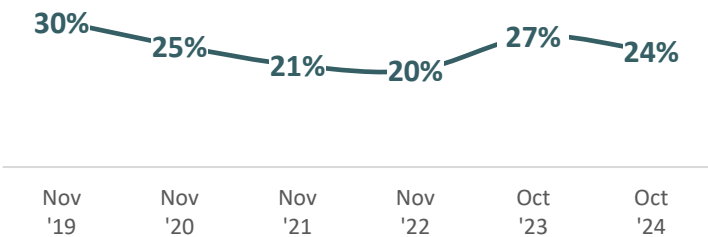
Barriers to Expansion/Renovation

The proportion of businesses undertaking a renovation is relatively stable year over year.

Over time it has hovered around a quarter, this year 24% of businesses report undertaking a renovation or expansion project in the last year that required a permit.

Timelines (48%) is considered the most significant barrier to the permit process. Subjectivity of guidelines, quality/timeliness of communications and uncertainty continue to be cited as top barriers.

% undertaking a renovation or expansion in past year



Top Barriers

- 48% Timelines
- 38% Subjectivity in guidelines
- 37% Quality/timeliness of communication
- 37% Uncertainty
- 29% Inexperience of the development officer
- 22% Information requests

Mentions above 20% shown

Barriers to Growth

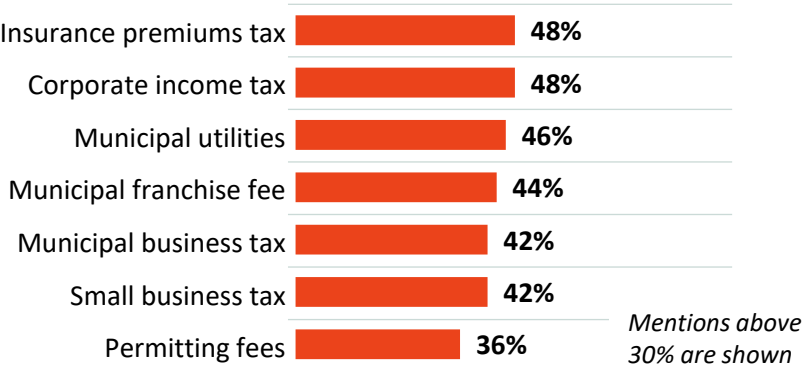
Fees/taxes continue to have a negative impact on business growth and competitiveness.

Similar to previous results, insurance premiums tax and corporate income tax are top cited barriers along with those charged by municipalities - municipal utilities, municipal franchise fee, municipal business tax - and small business tax.

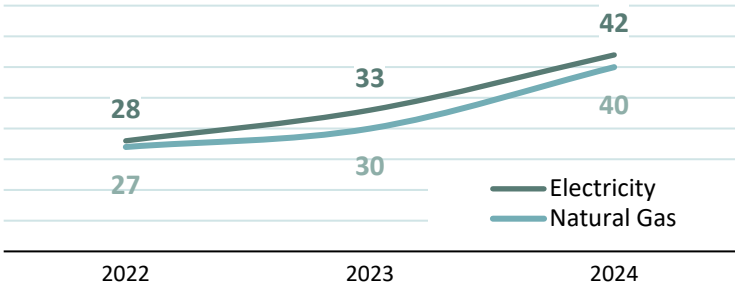
The proportion of businesses that consider these taxes and fees a barrier has been trending up since tracking began in 2020.

Among those aware of their municipal franchise fees on electricity or natural gas, the proportion reporting there have been increases has been trending up. In 2024, four-in-ten businesses report there have been increases for municipal franchise fees on electricity (42%) and natural gas (40%) in the last two years. However, half of businesses continue to not know if their municipality collects a franchise fee on electricity or natural gas.

Negative Impact on Growth and Competitiveness



% saying municipal franchise fees on electricity and natural gas has increased



Top Priorities for Municipal Candidates and Budget Clarity

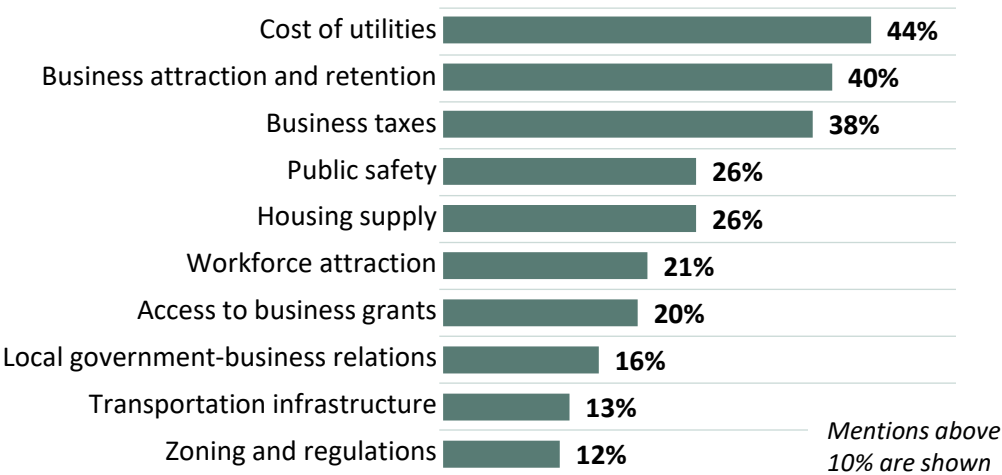
Cost of utilities is considered a top priority in the 2025 municipal elections.

Cost of utilities (44%), business attraction and retention (40%), and business taxes (38%) are cited as the top priorities for candidates in the 2025 Alberta municipal elections. The next tier of priorities includes public safety and housing supply, both 26%.

In terms of how municipalities explain their spending - detail and clarity around the budget and financial statements - businesses are quite divided on this issue. In all, 31% say the process is understandable (but with 23% of this group saying it could be improved). Another 31% believe the process is highly problematic, with 18% saying it needs significant improvement and 13% saying it is too simplified with no useful information.

The largest group (38%) say they don't pay sufficient interest to comment (22%) or don't know (16%).

Top Priorities for Municipal Candidates



Views of Municipalities

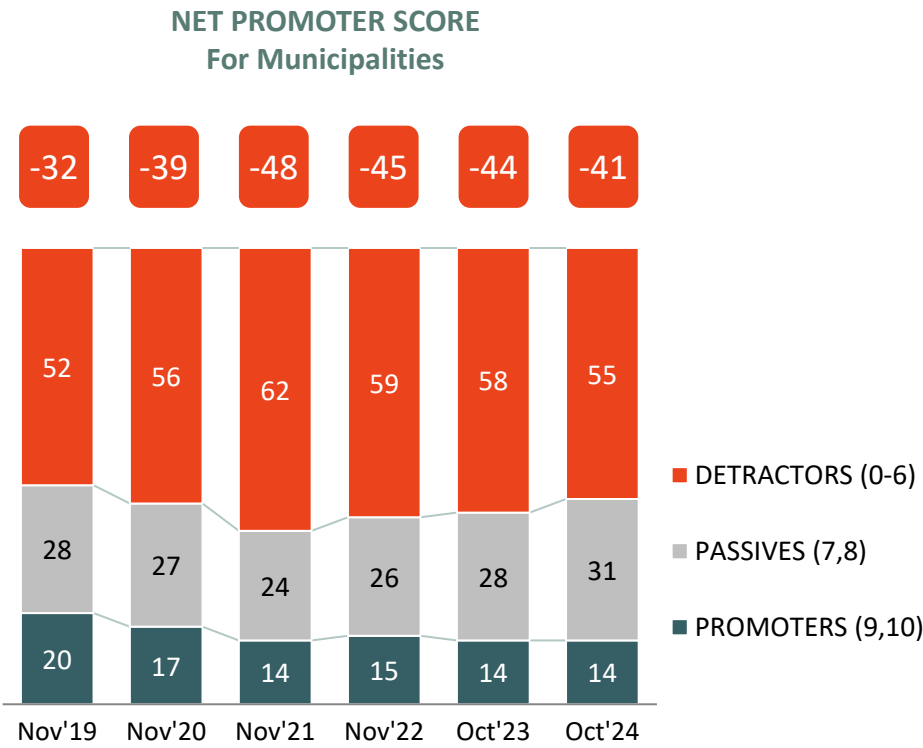
Likelihood to promote their local municipality for investment and business start-ups remains low.

The NPS for recommending their municipality remains low (-41) and well below the -32 recorded in 2019 (prior to COVID-19).

Only 14% of businesses are a ‘Promoter’ of the municipality where their business operates while 55% are a Detractor’.

Highlighting this, half (48%) of businesses indicate they are not satisfied with the business supports and services offered by their municipality. However, this increases to 71% among those that identify as ‘Detractors’.

This may suggest why many businesses are unlikely to recommend their municipality as a place for investment or a start-up.



Support from Elected Officials

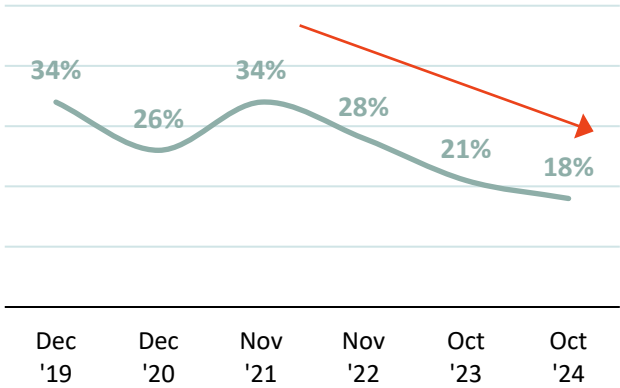
Contact by elected officials continued to decline in 2024.

Overall, communication with elected officials related to sustaining or growing a business continues to be minimal.

The proportion of businesses reporting they have been contacted by elected officials continues to trend down and is at the lowest level since tracking began. Just 18% of businesses report that they have been contacted by an elected representative over the last year to assist with their business.

It is far more likely that businesses reach out to elected officials and this is typically double the rate of being contacted.

% have been contacted by elected official

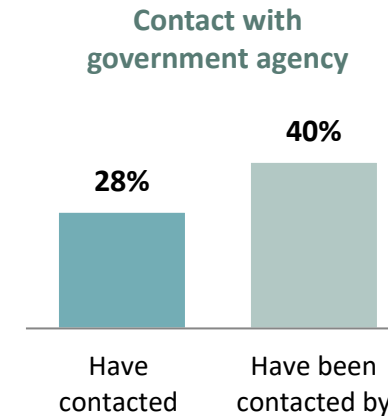


Support from Government Agencies

Compared to a year ago, businesses report more contact with government agencies.

This tended to be a result of increased contact with local economic development agencies/officers and local tourism bodies. Contact was more likely to be initiated by the agencies than businesses.

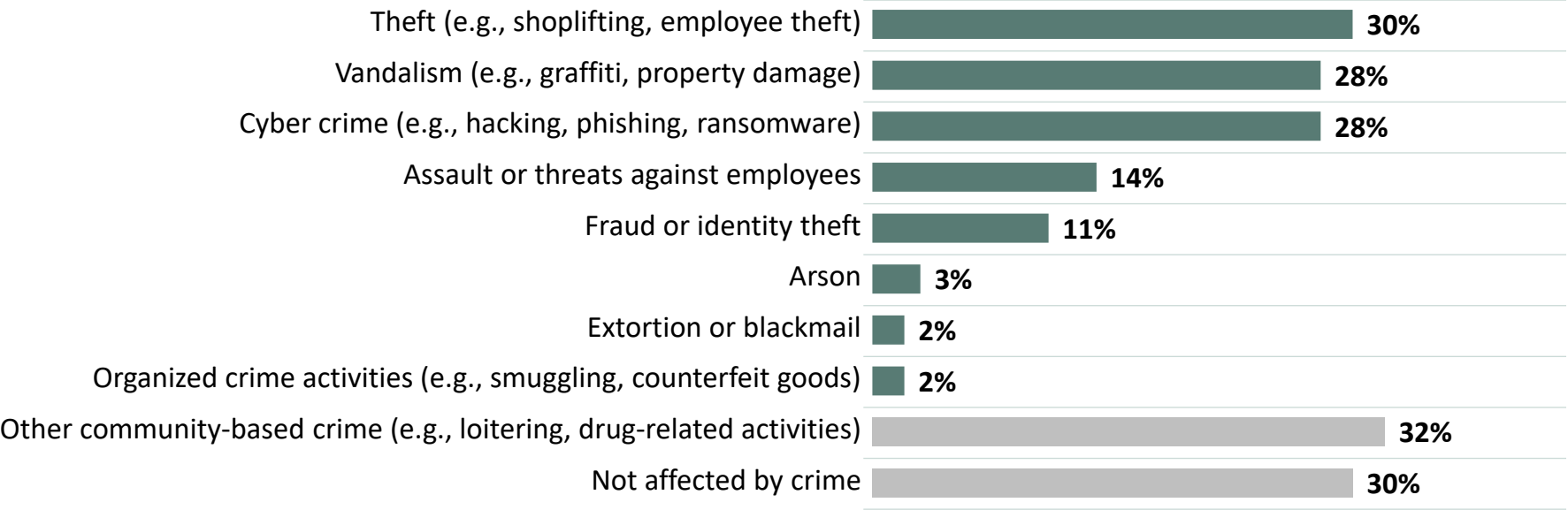
There appears to be an opportunity to increase contact with government agencies as a majority (72%) of businesses report that in the last year they have not contacted any of these agencies with respect to sustaining or growing their business.



DETAILED FINDINGS

The majority (70%) of Alberta businesses report being affected by some type of crime in the past 12 months. Theft (30%), vandalism (28%), cyber crime (28%), or other community-based crime such as loitering or drug-related activities (32%) as most frequently cited.

Business Affected by Types of Crime in past 12 months



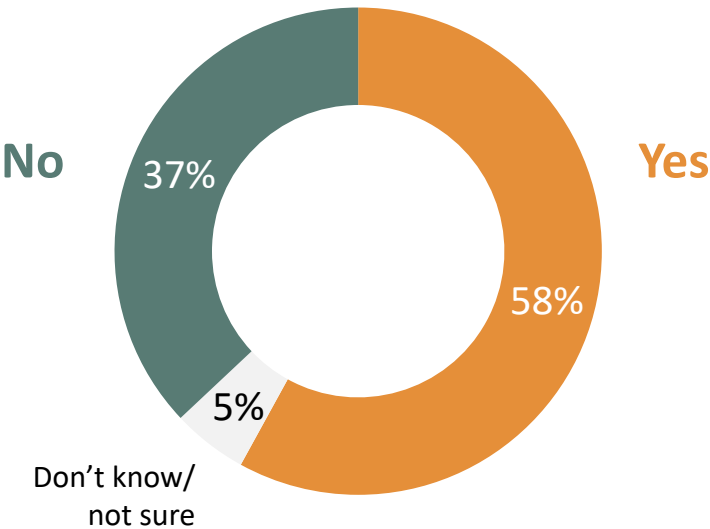
- Regionally, businesses in Calgary (19%) are the least likely to report theft. While a small base size, results are highest in the Northwest (51%).
- Non-profit organizations (42%) are more likely to have been affected by vandalism than those in the private (28%) or public (25%) sector.

Q1. Crime has become an increasingly important policy issue for business. In the past 12 months, has your business been affected by any of the following types of crime?

Base: Total sample (n=398)

Over half (58%) of all businesses indicate they have had to invest money to protect their business from crime or cyber attacks.

Had to Invest Money to Protect Business from Crime or Cyber Attacks in past 12 months

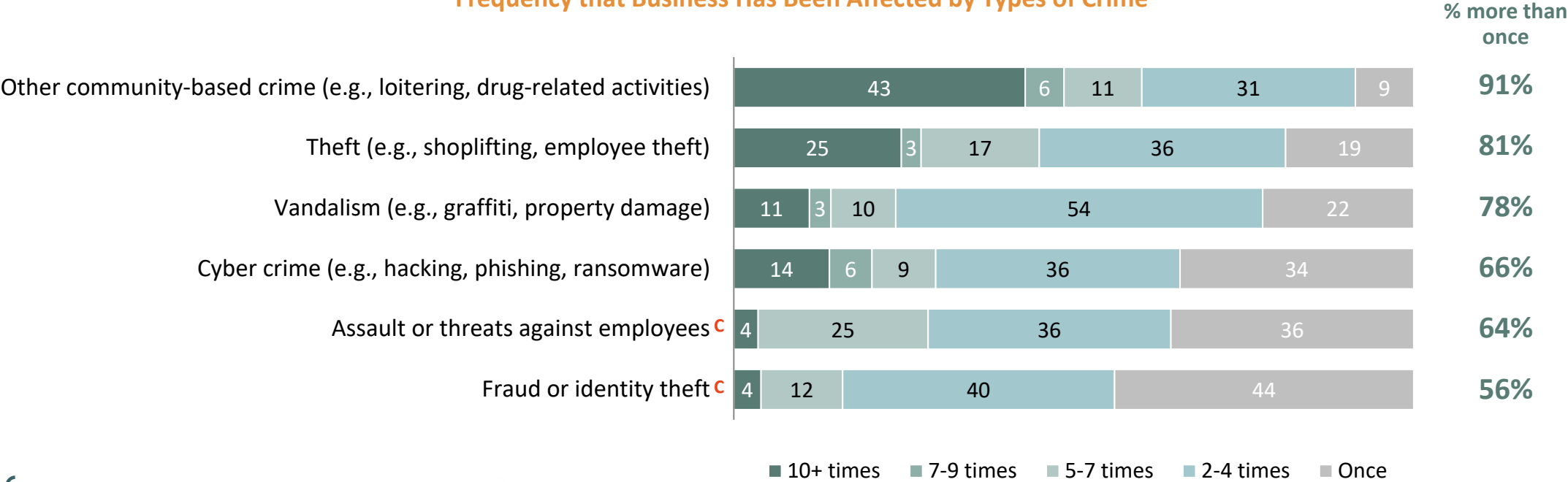


- Regionally, results are highest in the Northeast with 82%^c reporting they had to invest money to protect their business.
- Businesses in operation over 30 years (73%) are the most likely to have had to invest money. This compares to 34% among businesses in operation five years or less.

Q2. In the past 12 months, have you had to invest money to protect your business from crime or cyber attacks?
Base: Total sample (n=401)
^c Caution, small base size

Frequency of businesses experiencing crime varies greatly by type of crime ‘Other community-based crime, such as loitering or drug-related activities,’ being most frequent, with 43% of those citing this type of crime saying it occurred 10 or more times in the past 12 months. This is followed by theft, with one-quarter of businesses affected saying the frequency was 10 or more times.

Frequency that Business Has Been Affected by Types of Crime

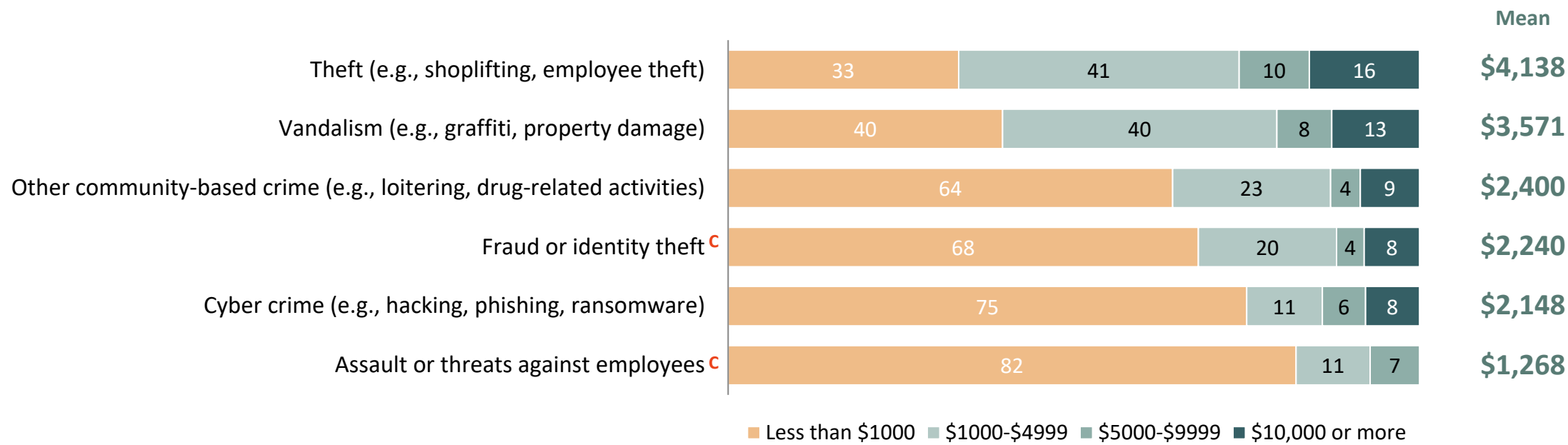


- About one-in-ten businesses affected by vandalism or cyber crime report they have dealt with it 10 or more times in the past year (11% and 14%, respectively).

Q1. In the past 12 months, how frequently your business been affected by the types of crime that you selected? (CARRY FORWARD ANSWERS)
Base: Business has been affected by type of crime (Base sizes vary from n=25 to n=70). Note: Extortion or blackmail, organized crime activities and arson are not mentioned due to small base sizes.
^c Caution, small base size (<30)

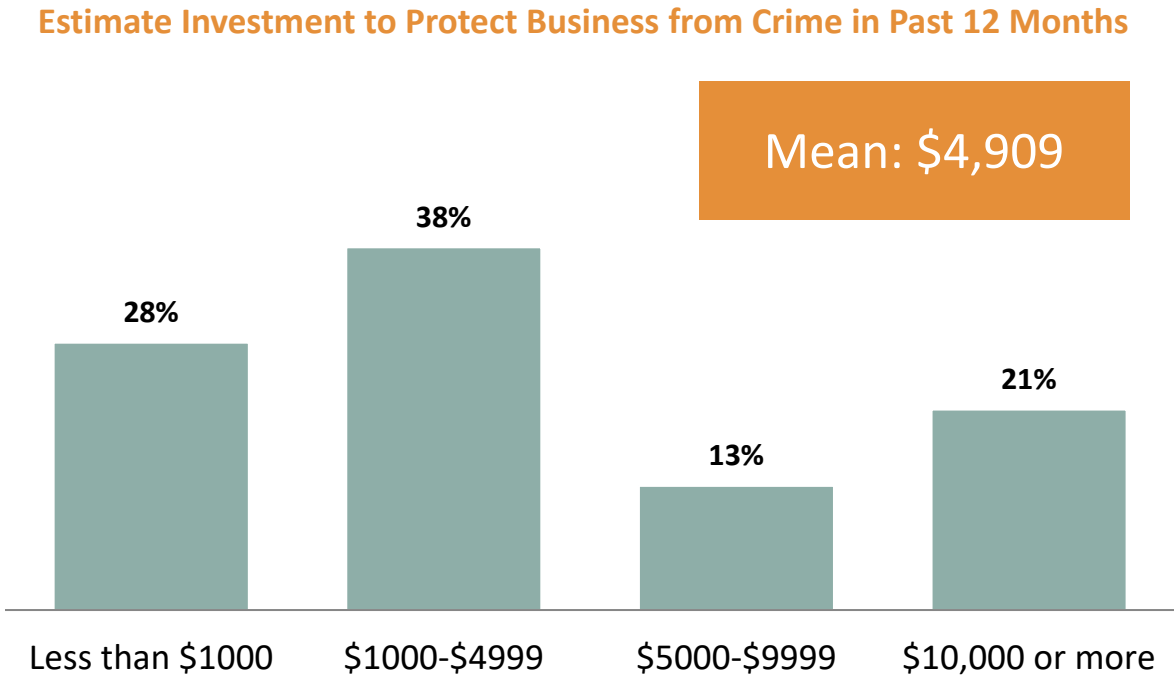
Estimated loss varies greatly by type of crime. Theft and vandalism tend to be the costliest for businesses impacted by these types of crime. Almost one-in-five (16%) report that theft has cost them \$10,000 or more in the past 12 months.

Estimated Loss Incurred by Types of Crime in past 12 months



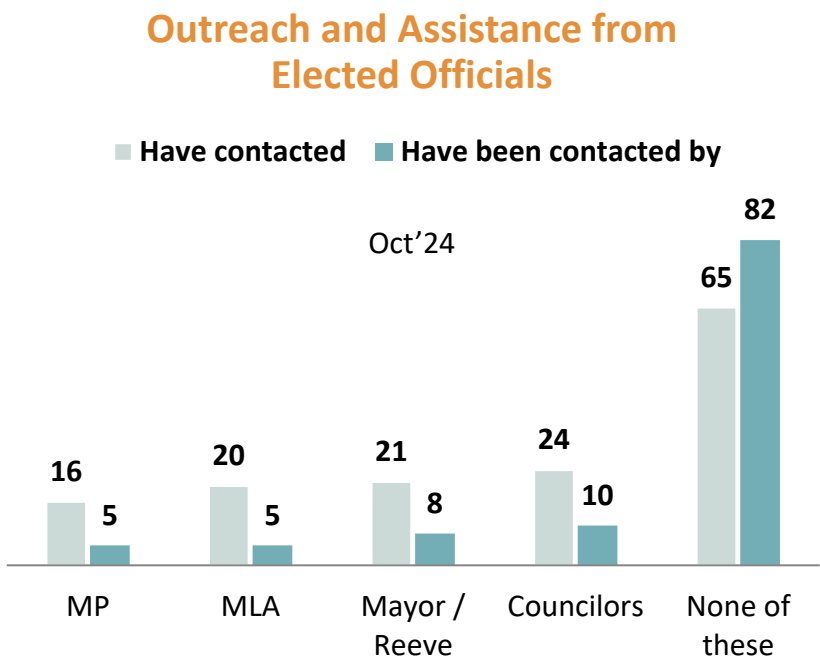
Q2. In the past 12 months, what was the estimated loss incurred, if any, by the types of crime that you selected?
Base: Business has been affected by type of crime (Base sizes vary from n=25 to n=70). Note: Extortion or blackmail, organized crime activities and arson are not mentioned due to small base sizes.
^C Caution, small base size (<30)

Among businesses that invested money in the past 12 months to protect their business from crime or cyber attacks, the mean amount spent was \$4,909. That said, one-in-five businesses (21%) report spending \$10,000 or more.

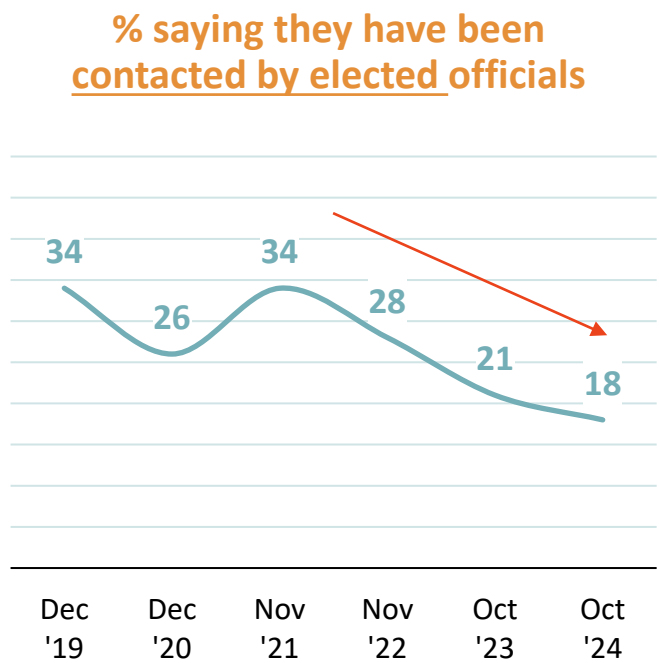


Q3. In the past 12 months, what was the estimate investment to protect your business from crime?
Base: Have invested money to protect business from crime or cyber attacks (n=137)

Again in 2024, businesses are far more likely to have reached out to elected officials than be contacted by them regarding sustaining or growing their business. The proportion of businesses reporting they have been contacted by elected officials has been trending down.



In all, excluding don't know responses, only 17% report being contacted by any elected official and 39% have contacted.



- Chamber of commerce members (37%) were more likely to have contacted elected officials in the last year than non-members (23%). Results for being contacted by elected officials are more similar (18% and 15%, respectively).

Q6. In the last year, which of the following, if any, have you or your business contacted or been contacted by with respect to sustaining or growing your business?
Base: Total sample (Nov 2019 n=1028; Nov 2020 n=372; Nov 2021 n=359; Nov 2022 n=539; Oct 2023 n=450; Oct 2024 n=368)

The majority (58%) of businesses report having some contact with at least one government agency in the last year with respect to sustaining or growing their business. In most cases the agency made contact rather than the business reaching out. Among those reporting contact, it was most likely to be with a local economic development agency/officer.

Outreach and Assistance from Government Agencies



Chamber and non- chamber members are as likely to have been contacted by various agencies, although there is variation in contact by agency. Chamber members are far more likely than non-members to report being contacted by a local economic development agency (17% to 9%). Non-members are more likely to report being contacted by Export Development Canada (12% to 4%) and Alberta Innovates (19% to 6%).

Overall, government agencies tend to be more active in contacting businesses than are elected officials.

Q8. In the last year, which of the following, if any, have you or your business contacted or been contacted by with respect to sustaining or growing your business?
Base: Total sample (Oct 2024 n=324 to 327)

Compared to a year ago, more businesses report having been contacted by government agencies. This tended to be a result of increased contact by local economic development agencies/officers and local tourism bodies.

Contact by Government Agencies – Trended

	Been Contacted By			
	Nov'19	Nov'22*	Oct'23	Oct'24
	%	%	%	%
Local economic development agency or officer	14	9	13	17
Alberta Jobs, Economy and Trade	8	6	9	11
Local tourism body	5	6	9	13
Alberta Innovates	4	5	8	10
Regional Economic Development Alliance (REDA) or agency (e.g. Edmonton Global)	4	3	4	6
Prairies Economic Development Canada	-	-	4	3
Export Development Canada	3	5	3	6
Global Affairs Canada	1	1	2	2
Other (ex. Community Futures, Business Link)	9	10	13	17
None of these	66	66	72	60
Don't know/not sure	6	5	-	-

Q8. In the last year, which of the following, if any, have you or your business contacted or been contacted by with respect to sustaining or growing your business?

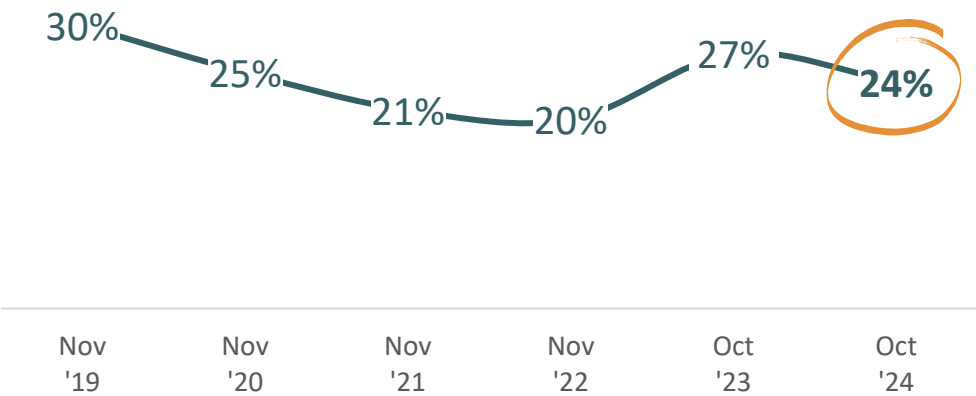
Base: Total sample (Nov 2022 [Hub members only] n=145; Oct 2023 n=450; Oct 2024 (n=324 - 327)

* Asked of Hub members only

■ Significant increase over previous wave at 95% confidence level
■ Significant decrease over previous wave at 95% confidence level

One-quarter (24%) of businesses report undertaking a renovation or expansion project in the last year that required a permit.

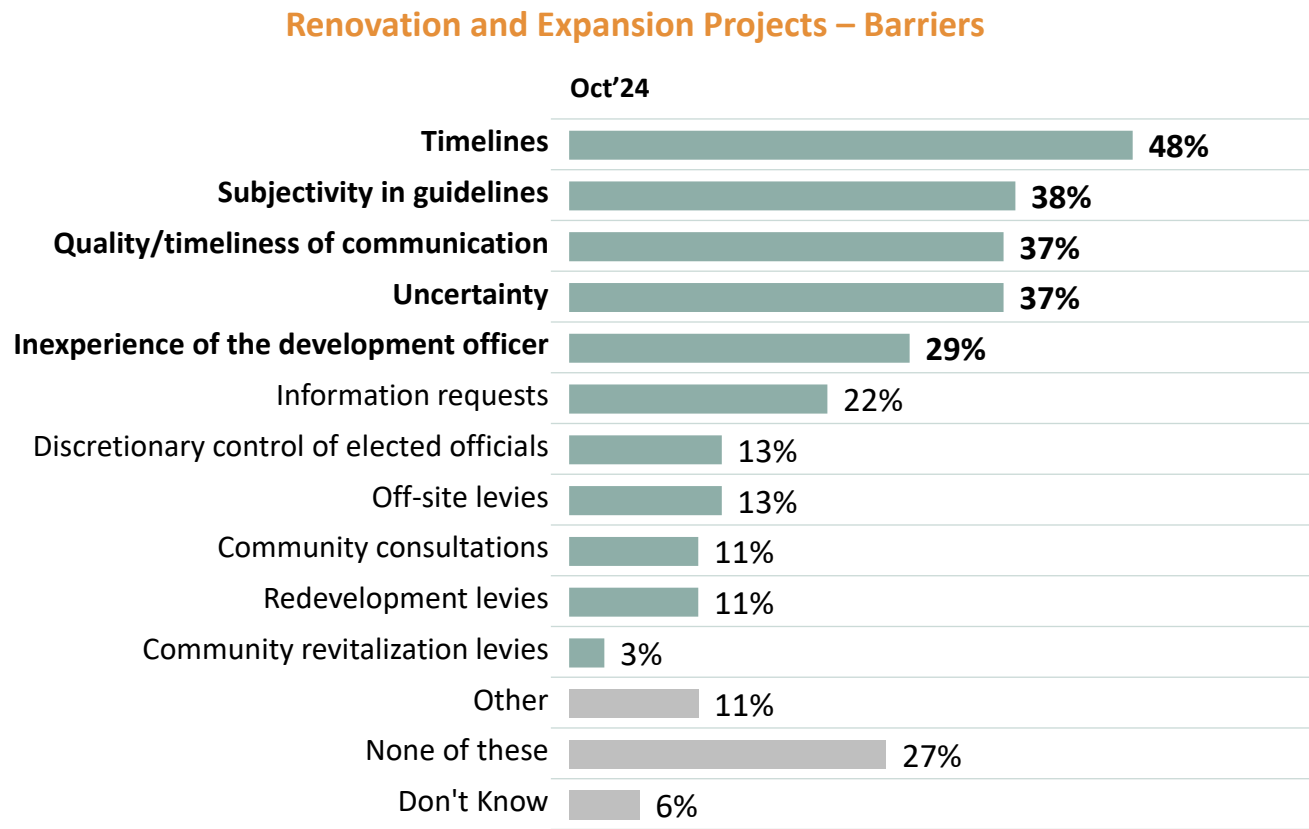
Renovation and Expansion Projects Requiring a Permit
(% Yes)



- Not-for-profit organizations (44%) are more likely to have done a renovation or expansion requiring a permit compared to those in the private (21%) or public (20%) sector.
- Men (29%) are more likely than women (18%) to indicate they have completed work requiring a permit.
- Double the proportion of Chamber of Commerce members (26%) completed a renovation of expansion requiring a permit compared to non-members (13%).

Q11. Has your business undertaken a renovation or expansion project requiring a building or development permit in the last year?
Base: Total sample (Nov 2019 n=860 asked only of a non-developer and business has not undertaken a capital development project) Nov 2020 n=330; Nov 2021 n=359; Nov 2022 n=539; Oct 2023 n=450; Oct 2024 n=310)

Among those businesses reporting a renovation or expansion project, timelines (48%) was the top cited barrier to the permit process. Subjectivity of guidelines, quality/timeliness of communications, and uncertainty are also considered top barriers.



- Overall, just over one-quarter (27%) did not identify a barrier, while 6% 'don't know' resulting in two-thirds indicating they encountered some type of barrier.

Q4. You earlier mentioned that your had business undertaken a renovation or expansion project requiring a building or development permit in the last year. Which of the following factors (if any) in the permit process have been significant barriers to your project(s)?

Base: Have undertaken renovation/expansion project (Oct 2024 n=63)

The same barriers continue to be reported by those undertaking a renovation or expansion. In 2024, there were increases measured for most of the top barriers – significantly for timelines and information requests.

Renovation and Expansion Projects – Barriers – Trended

Top brriers	Nov'19	Nov'20	Nov'21	Nov'22	Oct'23	Oct'24
	%	%	%	%	%	%
Timelines	34	50	47	37	30	48
Subjectivity in guidelines	29	44	28	33	29	38
Quality/timeliness of communication	31	39	32	37	26	37
Uncertainty	30	35	38	27	27	37
Inexperience of the development officer	23	37	39	31	27	29
Information requests	17	23	12	20	9	22
Discretionary control of elected officials	17	36	26	21	16	13
Off-site levies	5	14	9	7	11	13
Community consultations	10	17	16	11	11	11
Redevelopment levies	11	24	11	-	7	11
Community revitalization levies (CRL)	3	5	7	4	2	3
Other	10	6	3	1	13	11
None of the above	n/a	15	20	14	24	27
Don't know/not sure	20	1	-	3	4	6

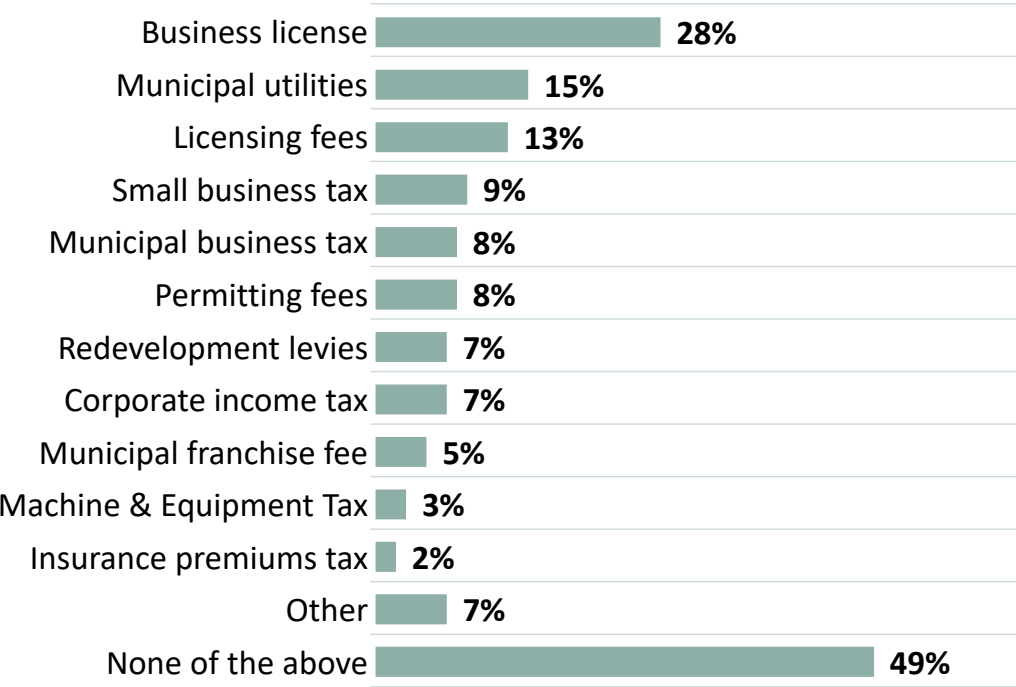
Q4. You earlier mentioned that your had business undertaken a renovation or expansion project requiring a building or development permit in the last year. Which of the following factors (if any) in the permit process have been significant barriers to your project(s)?

Base: Have undertaken renovation/expansion project (Nov 2019 n=260; Nov 2020 n=84; Nov 2021 n=74; Nov 2022 n=107; Oct 2023 n=90; Oct 2024 n=63)

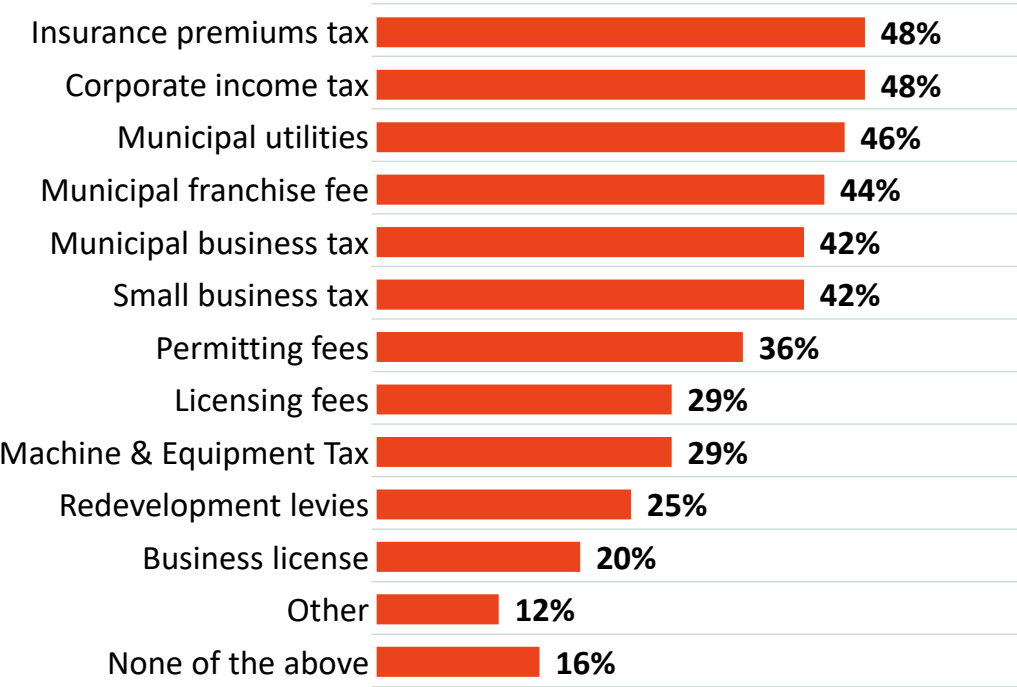
■ Significant increase over previous wave at 95% confidence level
■ Significant decrease over previous wave at 95% confidence level

Businesses continue to cite a wide variety of fees/taxes that they believe negatively affect competitiveness and/or growth. Half (49%) indicate that none of these have a positive impact.

Positive Impact on Growth and Competitiveness



Negative Impact on Growth and Competitiveness



Q10. Which of the following most positively and most negatively impact the growth or competitiveness of your business? (Please check your top three choices for each)
Base: Total sample (Oct 2024 positively impact n=158; negatively impact n=292)

Compared to a year ago, with the exception of insurance premiums tax, a larger proportion of businesses view these taxes and fees as a barrier to the growth or competitiveness of their business.

Barriers to Growth of Business – Trended

	Nov'20	Nov'21	Nov'22	Oct'23	Oct'24
	%	%	%	%	%
Insurance premiums tax	30	34	38	48	48
Corporate income tax	25	32	36	39	48
Municipal utilities	25	28	34	39	46
Municipal franchise fees	25	27	36	38	44
Municipal business tax (mill rate)	24	28	30	34	42
Small business tax	26	29	35	32	42
Permitting fees	21	15	22	24	36
Licensing fees	19	14	23	21	29
Machine and equipment tax	n/a	n/a	n/a	n/a	29
Redevelopment levies	10	6	12	14	25
Business license	15	7	12	10	20
None of the above	21	-	-	16	16
Other	n/a	n/a	n/a	16	12
Don't know/not sure	8	9	21	9	n/a

- The proportion of businesses that consider these taxes and fees a barrier has been trending up since tracking began in 2020.

Q10. Which of the following most positively and most negatively impact the growth or competitiveness of your business?
(Please check your top three choices for each)

Base: Total sample (Nov 2020 n=330; Nov 2021 n=359; Nov 2022 n= 539; Oct 2023 n=450; Oct 2024 n=292)

■ Significant increase over previous wave at 95% confidence level
■ Significant decrease over previous wave at 95% confidence level

The business license continues to be viewed as having the most positive benefit for the growth or competitiveness of their business. The decline measured for municipal utilities was reversed in 2024 and is now on par with licensing fees.

Benefits of Fees, Taxes and Levies for Business (Largest Benefit) – Trended

	Nov'21	Nov'22	Oct'23	Oct'24
	%	%	%	%
Business license	16	22	20	28
Municipal utilities	10	12	5	15
Licensing fees	1	4	4	13
Small business tax	10	5	9	9
Municipal business tax (mill rate)	4	4	4	8
Permitting fees	1	2	2	8
Corporate income tax	7	10	7	7
Redevelopment levies	3	1	2	7
Municipal franchise fees on utilities (gas or electric)	-	2	2	5
Machine and Equipment tax	n/a	n/a	n/a	3
Insurance premiums tax	-	2	2	2

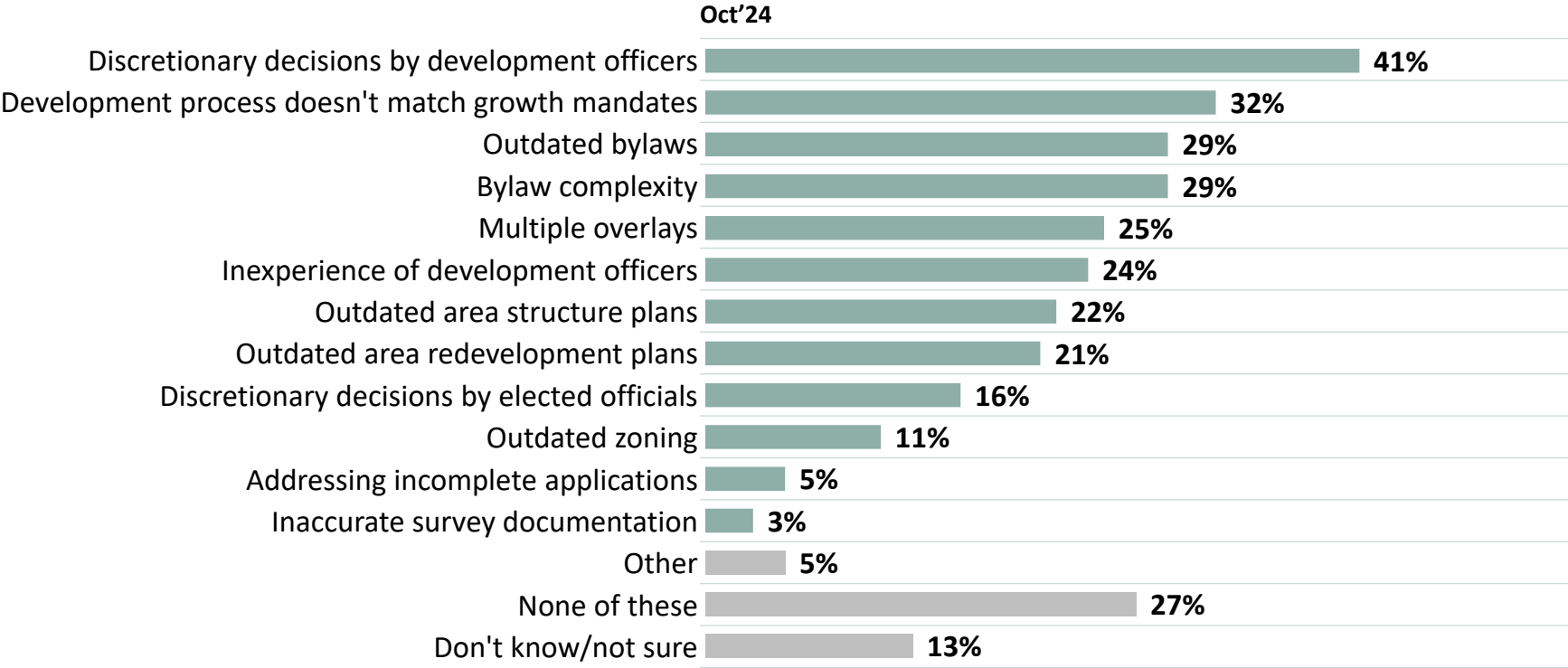
Q10. Which of the following most positively and most negatively impact the growth or competitiveness of your business? (Please check your top three choices for each). Previous question wording: Of the items you earlier selected as benefiting your business, which most benefits the growth or competitiveness of your business?

Base: More than one option selected at Q12 (Nov 2021 n=136; Nov 2022 n=182; Oct 2023 n=264); Oct 2024 n=158 - those answering positive impact

■ Significant increase over previous wave at 95% confidence level
■ Significant decrease over previous wave at 95% confidence level

The top cited barriers to the growth/sustainability of a business in terms of specific bylaws and zoning related issues include: discretionary decisions by development officers; that the development process doesn't match growth mandates; and bylaws that are outdated and/or complex.

Complying with Bylaws/Zoning as Barriers to Growth/Sustainability of Business



Q5. Which of the following factors (if any) of complying with bylaws and zoning are barriers to the growth or sustainability of your business?

Base: Total answering (Oct 2024 n=63)

Discretionary decisions by development officers is the top barrier to the growth or sustainability of their business when complying with bylaws and zoning – and has been since 2019 when tracking began.

Complying with Bylaws/Zoning as Barriers to Growth/Sustainability of Business – Trended

	Nov'19	Nov'20	Nov'21	Nov'22	Oct'23	Oct'24
	%	%	%	%	%	%
Discretionary decisions by development officers	39	50	41	40	31	41
Development process doesn't match growth mandates	38	33	23	27	30	32
Outdated bylaws	26	27	22	28	22	29
Bylaw complexity	42	42	35	38	28	29
Multiple overlays	20	19	11	18	13	25
Inexperience of development officers	31	36	31	28	23	24
Outdated area structure plans	19	19	18	10	15	22
Outdated area redevelopment plans	14	23	14	17	15	21
Discretionary decisions by elected officials	35	33	23	25	29	16
Outdated zoning	29	30	23	19	19	11
Addressing incomplete applications	7	12	7	16	5	5
Inaccurate survey documentation	8	15	5	10	6	3
Other	-	12	5	1	8	5
None of these	11	18	16	14	22	27
Don't know/not sure	8	4	5	6	11	13

Q5. Which of the following factors (if any) of complying with bylaws and zoning are barriers to the growth or sustainability of your business?

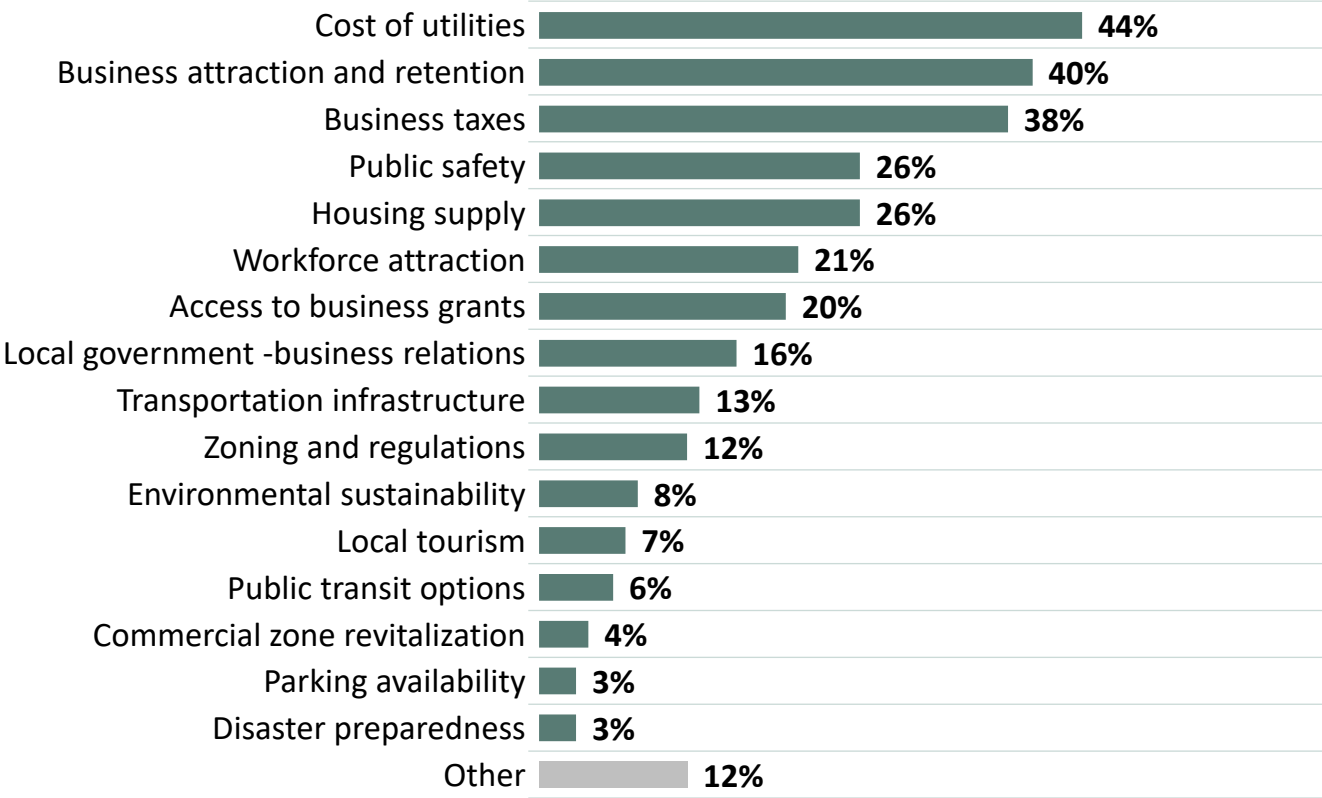
Base: Developers or have undertaken capital project (Nov 2019 n=154; Nov 2020 n=84; Nov 2021 n=74; Nov 2022 n=107; Oct 2023 n=293; Oct 2024 n=63)

■ Significant increase over previous wave at 95% confidence level

■ Significant decrease over previous wave at 95% confidence level

Cost of utilities (44%), business attraction and retention (40%), and business taxes (38%) are considered the top priorities for candidates in the 2025 Alberta municipal elections. The next tier of priorities includes public safety and housing supply, both 26%.

Top 3 Priorities for Candidates in 2025 Alberta Municipal Elections, According to Business Needs



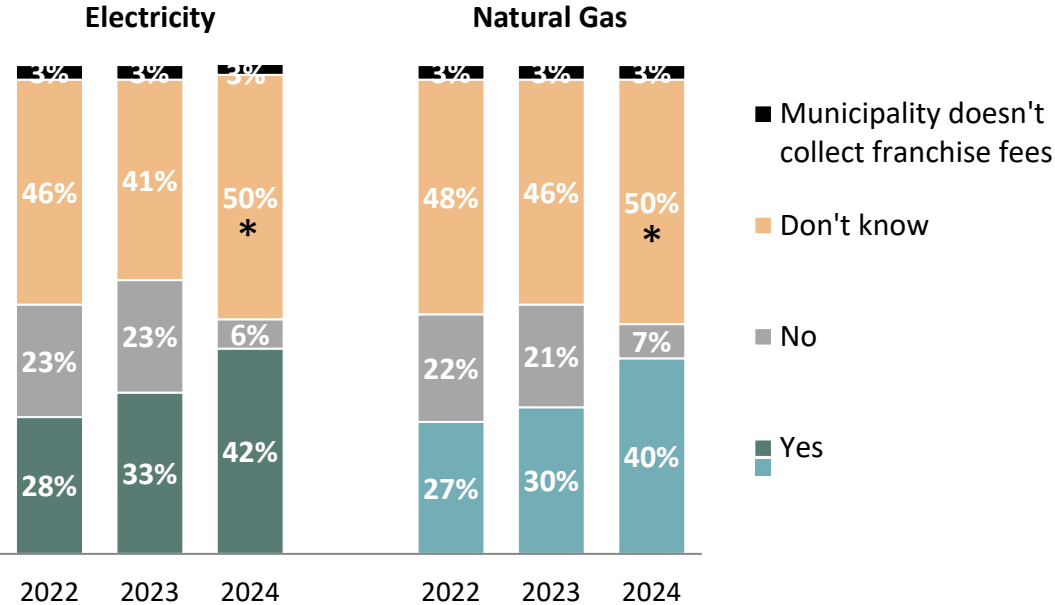
- Half (52%) of businesses in operation five years or less feel business attraction and retention should be a top priority.
- Regionally, housing supply is a higher priority in Mountain Parks and the Southwest.
- By sector, housing supply is a higher priority among not-for-profit organizations (40%) than among those in the private (26%) or public (24%) sector.

Q3. What do you feel should be the top three priorities for candidates in the 2025 Alberta municipal elections, according to your business needs? Please select your top 3 priorities.

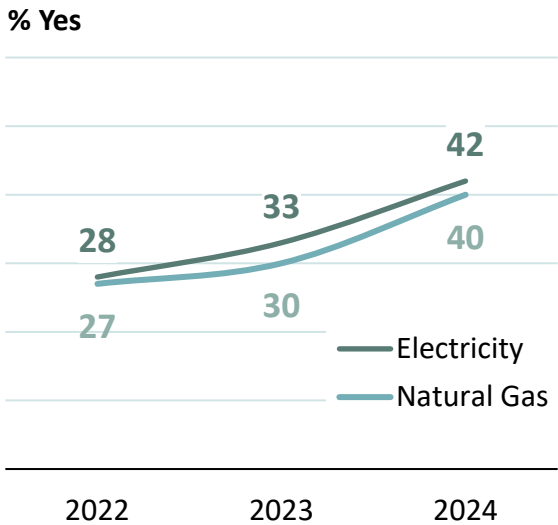
Base: Total sample (n=389)

The proportion aware of municipal franchise fees continues to increase. But fully half (50%) of businesses continue to report that they don't know if their municipality has increased franchise fees on electricity or natural gas in the last two years.

Aware of Municipal Franchise Fee Increases



* Includes not familiar with franchise fees:
Electricity: Don't know 34% + Not familiar 15%
Natural Gas: Don't know 34% + Not familiar 16%

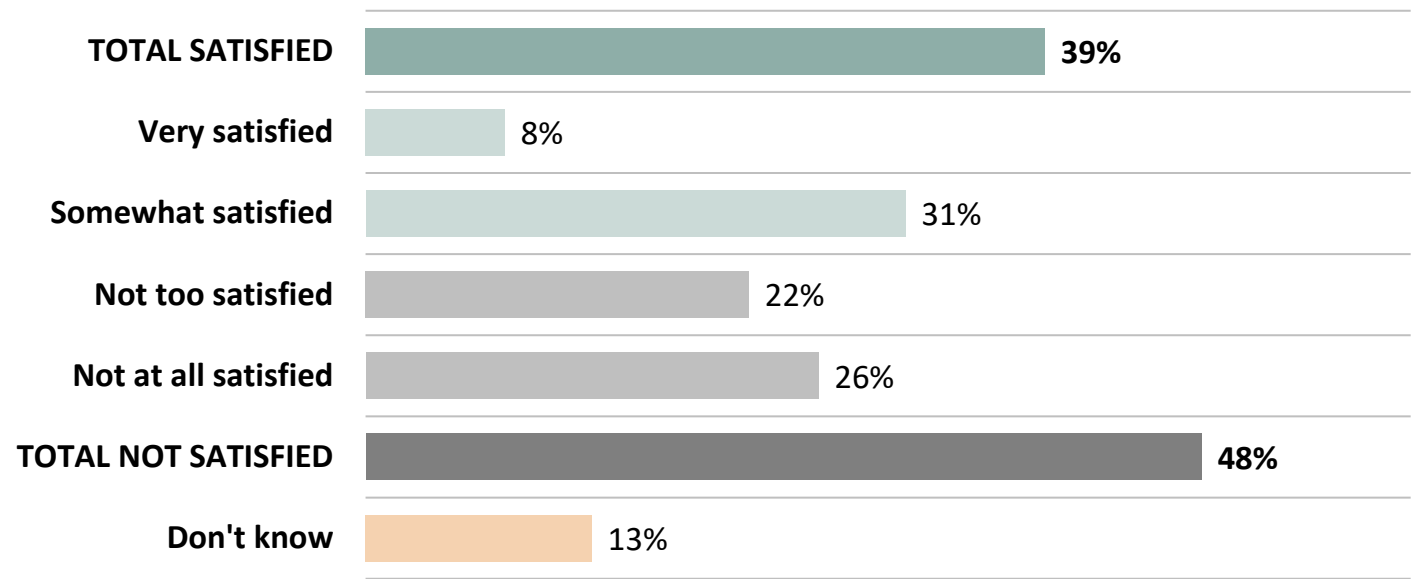


- Among those aware of their municipal franchise fees on electricity or natural gas, the proportion reporting there has been increases has been trending up. In 2024, four-in-ten businesses report there have been increases for municipal franchise fees on electricity (42%) and natural gas (40%) in the last two years.

Q5. Has the municipality(s) your business operates in increased municipal franchise fees on electricity or natural gas in the last two years?
2022/2023 Question: Are you aware of the municipality(s) your business operates in increasing municipal franchise fees on electricity or natural gas in the last two years?
Base: Total sample (Nov 2022 n=539; Oct 2023 n=450; Oct 2024 n=377)

Half (48%) of businesses indicate they are not satisfied with the business supports and services offered by their municipality and intensity is high with one-quarter (26%) ‘not at all’ satisfied.

Level of Satisfaction with Business Supports and Services Offered by Municipality



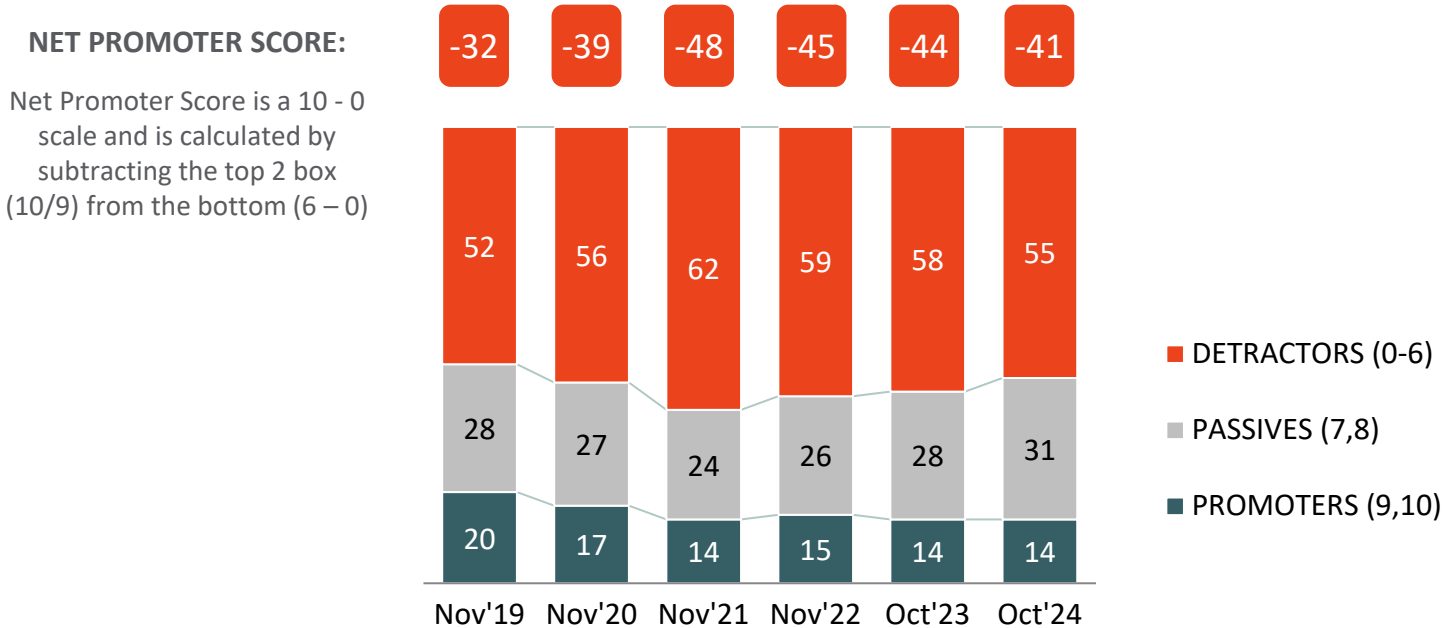
- Businesses in the private sector (53%) are more likely to indicate dissatisfaction than are those in the public (38%) or not-for-profit (35%) sectors.
- Chamber of Commerce members (43%) are more likely to say they are satisfied compared to non-members (23%).

Q12. Overall, how satisfied are you with the business supports and services offered by your municipality?

Base: Total sample (n=310)

The NPS for recommending their municipality remains low (-41). Only 14% of businesses are a ‘Promoter’ of the municipality where their business operates. NPS remains well below the -32 recorded in 2019 (prior to COVID-19).

NET PROMOTER SCORE
For Municipalities



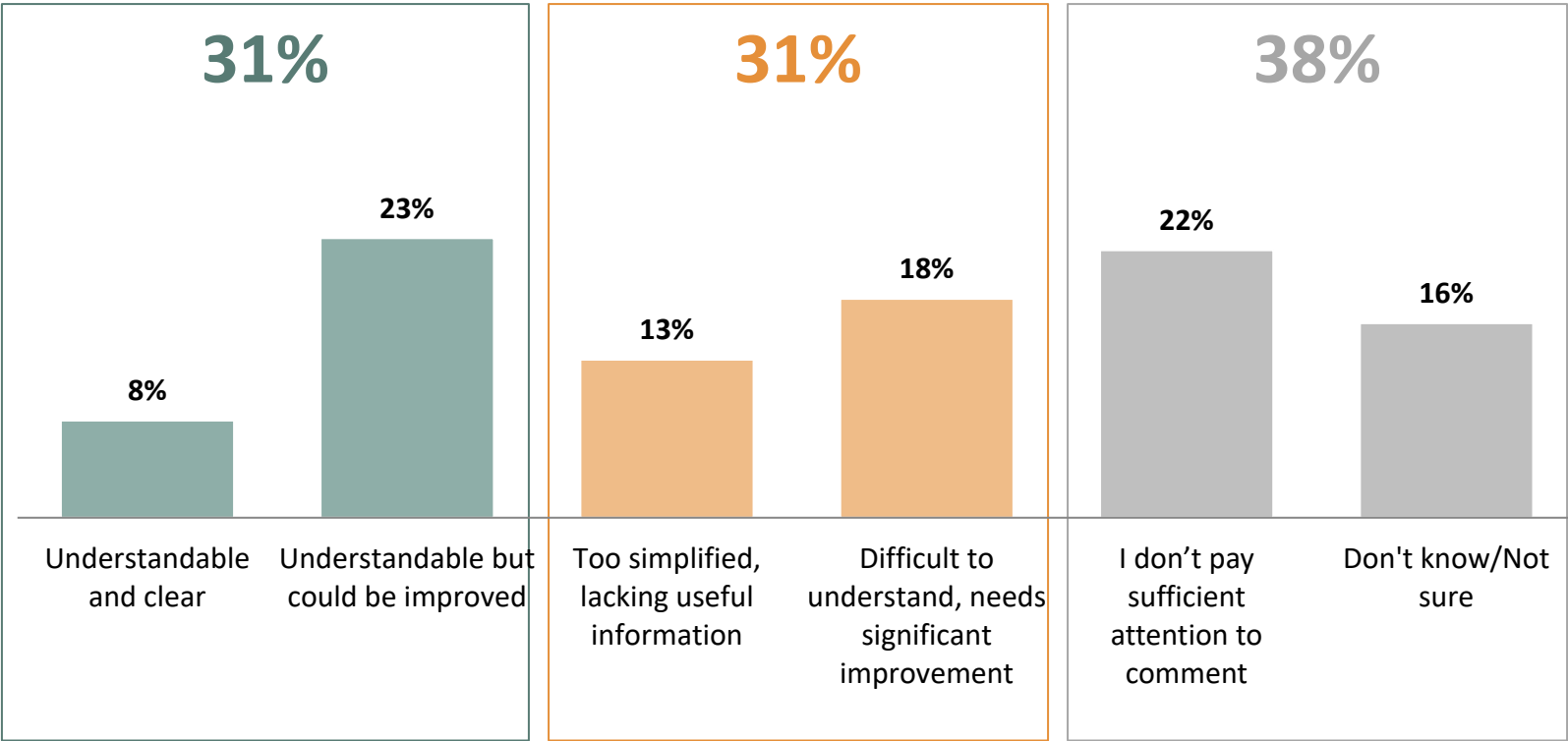
There appear to be a range of factors which impact the NPS score and recommending or not recommending the municipality their business operates, including:

- Half (51%) of Promoters report not being affected by crime in the last 12 months compared to 27% of Detractors. They were also less likely to have had to invest money to protect their business from crime or cyber attacks in the last year (72% and 57%, respectively).
- There are also differences in their views on the current level of detail and clarity in municipal budgets and financial statements: understandable and clear/understandable but could be improved Promoters (52%), Detractors (22%).
- Detractors are also more likely to say that their municipalities have increased franchise fees on electricity and natural gas in the past two years.
- While 84% of Promoters say they are satisfied with the business supports and services offered by their municipality, this declines to 15% among Detractors.

Q13. How likely are you to recommend to a business friend or colleague that they set up business or invest in the municipality where your business operates?
Base: Total sample (Nov 2019 n=1028; Nov 2020 n=283; Nov 2021 n=359; Nov 2022 n=539; Oct 2023 n=450; Oct 2024 n=310)

Three-in-ten (31%) businesses say the current level of detail and clarity in municipal budgets and financial statements is too simplified or are difficult to understand. Another 31% say they are understandable (although most of this segment indicate there could be improvements). The largest group (39%) appear disengaged and either don't know or don't pay sufficient attention.

Level of Detail and Clarity in Municipal Budgets and Financial Statements

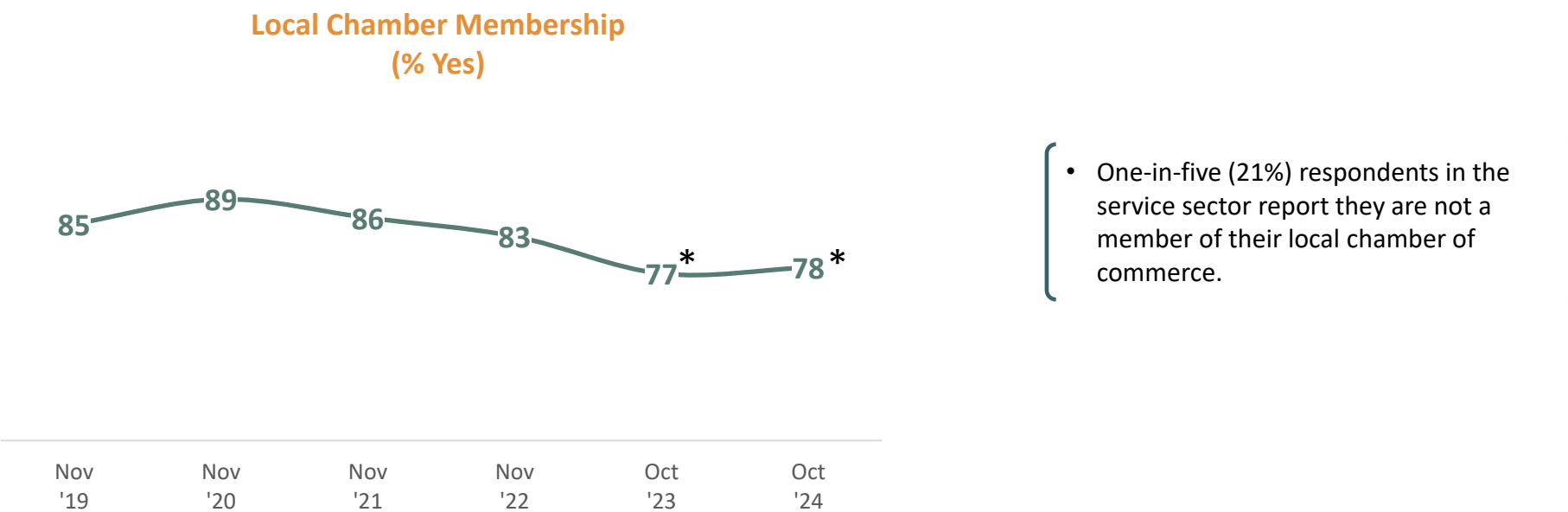


• By years in operation, newer businesses are more likely to report they don't pay sufficient attention to comment: in operation less than five years 32%; six to 10 years 30%.

Q4. How would you rate the current level of detail and clarity in municipal budgets and financial statements: are they understandable, in need of improvement, or too simplified to be useful?

Base: Total sample (n=385)

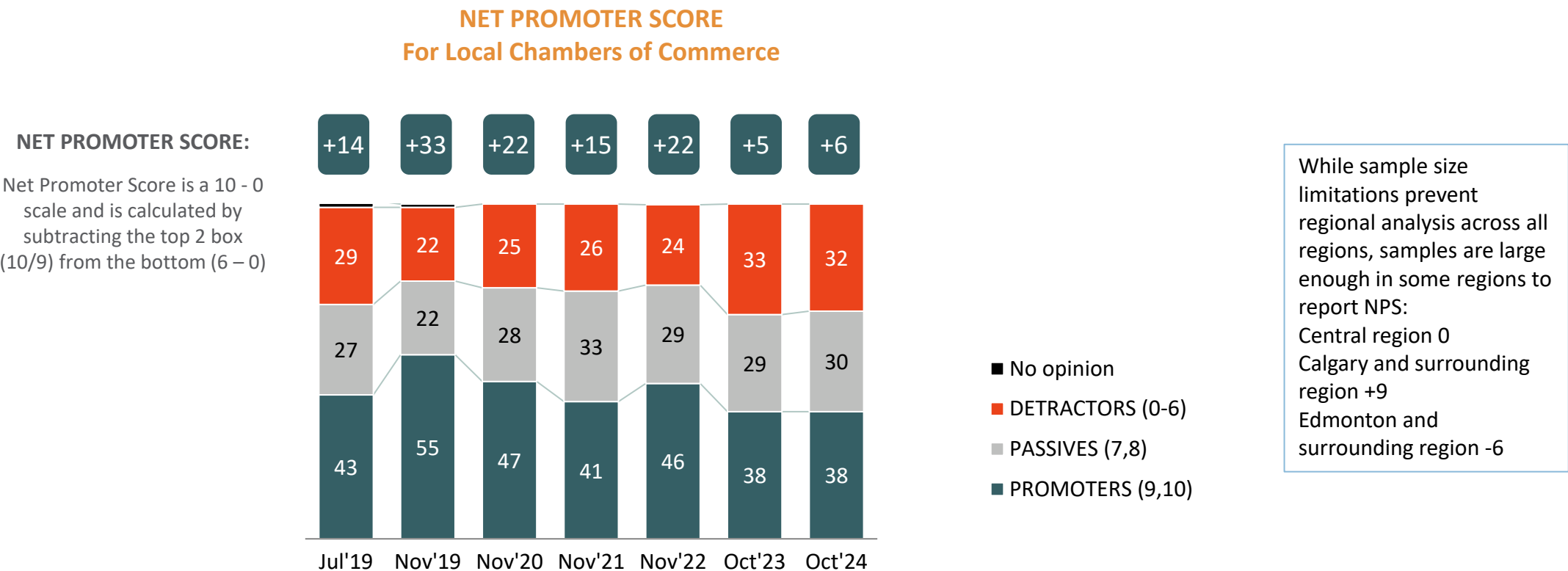
Similar to recent years, most respondents continue to report being members of their local Chamber, but both in 2023 and this year the proportion who are not chamber members has increased over earlier years.



* Note: “Not aware of a local chamber of commerce” was added as a response category in 2023. 2% of respondents selected this response in 2023 and 1% in 2024.

Q14. Are you a member of your local chamber of commerce?
Base: Total sample (Nov 2019 n=1028; Nov 2020 n=251; Nov 2021 n=359; Nov 2022 n=539; Oct 2023 n=450; Oct 2024 n=309)

The Net Promotor Score (NPS) for local chambers of commerce has been highly volatile. The NPS score in 2024 remains on par with results from 2023 and lower than previous years, with 38% Promoters and 32% Detractors.



RESPONDENT PROFILE - FIRMOGRAPHICS

Respondent Profile – Firmographics

