

2003

State of the Community Report



Business Survey Results:
Advanced Analyses

Prepared for:

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Office of the CAO
The City of Greater Sudbury

By:



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Area - Related Differences

In order to assess differences among areas of the city as a function of city services, separate 2 (Area: Sudbury, Greater Sudbury Area [GSA]) x 7 (City Service) mixed-model analyses of variance were conducted on the mean satisfaction and importance ratings. These analyses assess: 1) whether there are significant differences between the areas; 2) whether there are significant differences among the various city services; and 3) whether there are Area X City Service interactions (that is, for example, whether the differences in ratings of satisfaction with the 7 city services vary across areas). On all significant effects, analyses of simple main effects and Fisher's Adjusted Least Significant Difference tests were conducted in order to identify statistically significant differences.

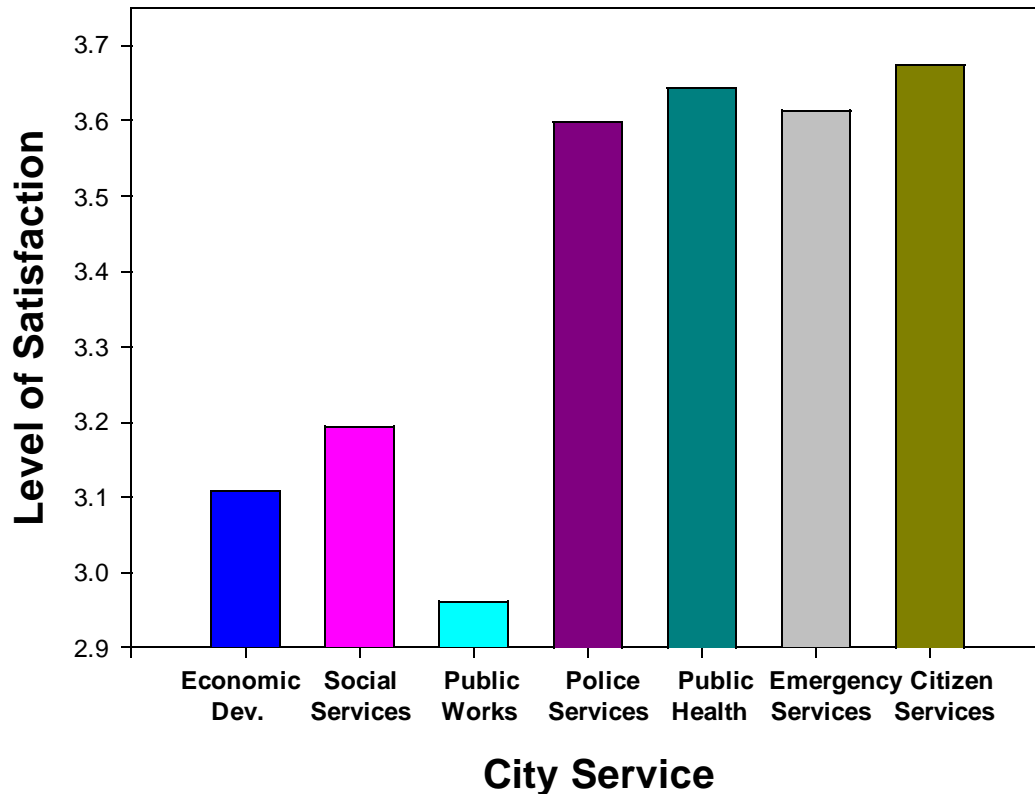
For other analyses, oneway analyses of variance were conducted on continuous measures and χ^2 analyses were conducted on categorical measures.

Throughout this report, only statistically significant effects are presented. All effects are significant at the $p < .05$ level (unless otherwise noted). This means that there are less than 5 chances in 100 that a reported effect does not reflect a true effect. In the case of an effect that occurs at the $p < .0001$ level, there is less than 1 chance in 10000 that the reported effect does not reflect a true effect. Fisher's Adjusted Least Significant Difference tests were used to follow up all statistically significant effects, in order to test for statistically significant differences among ratings. All differences were significant at the $p < .05$ level (unless otherwise noted).

For all measures that are **not** reported below, there were no differences as a function of Area (or Type of Business, for the subsequent section). Refer to the Executive Summary to gauge the opinions of businesses on these measures.

Similar analyses were conducted as a function of Type of Business.

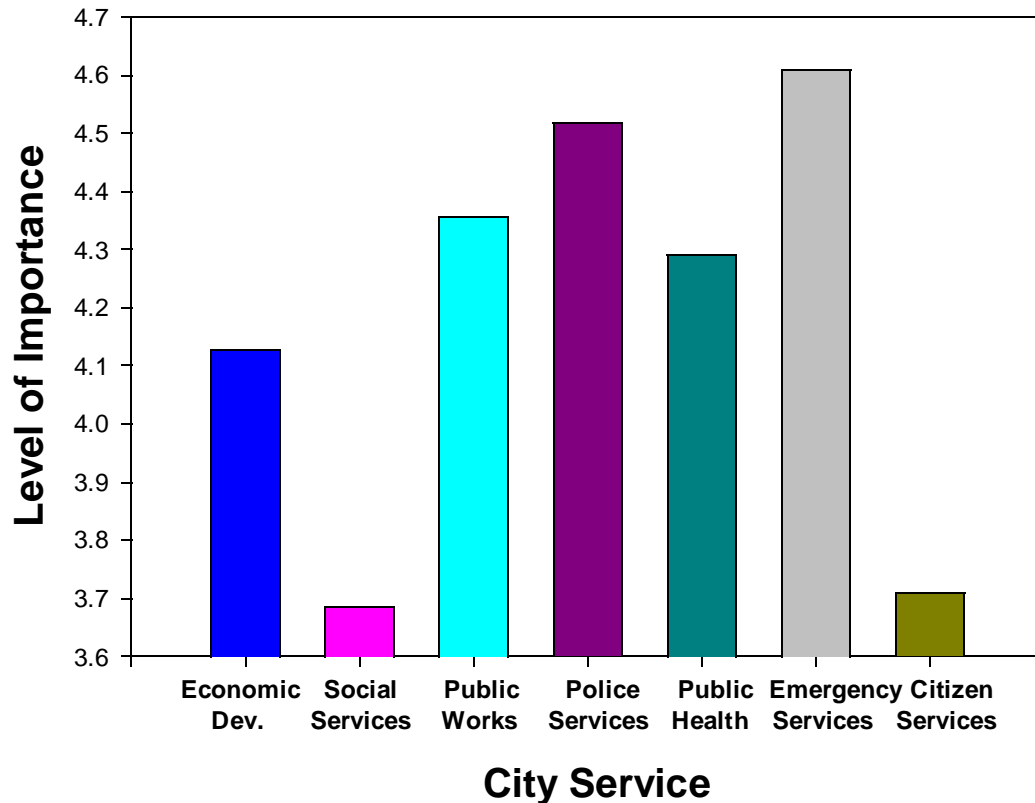
Level of Satisfaction as a Function of City Service: Business



On level of satisfaction, there was an effect for City Service ($p < .0001$). Respondents were most satisfied with Citizen Services and least satisfied with Public Works. Satisfaction ratings for Public Works were significantly lower than satisfaction ratings for all other services. Satisfaction ratings for Economic Development & Planning and Social Services did not differ, but both differed from the ratings of all other services. No other comparisons were significant.¹

¹ This effect was independent of both Area and Type of Business.

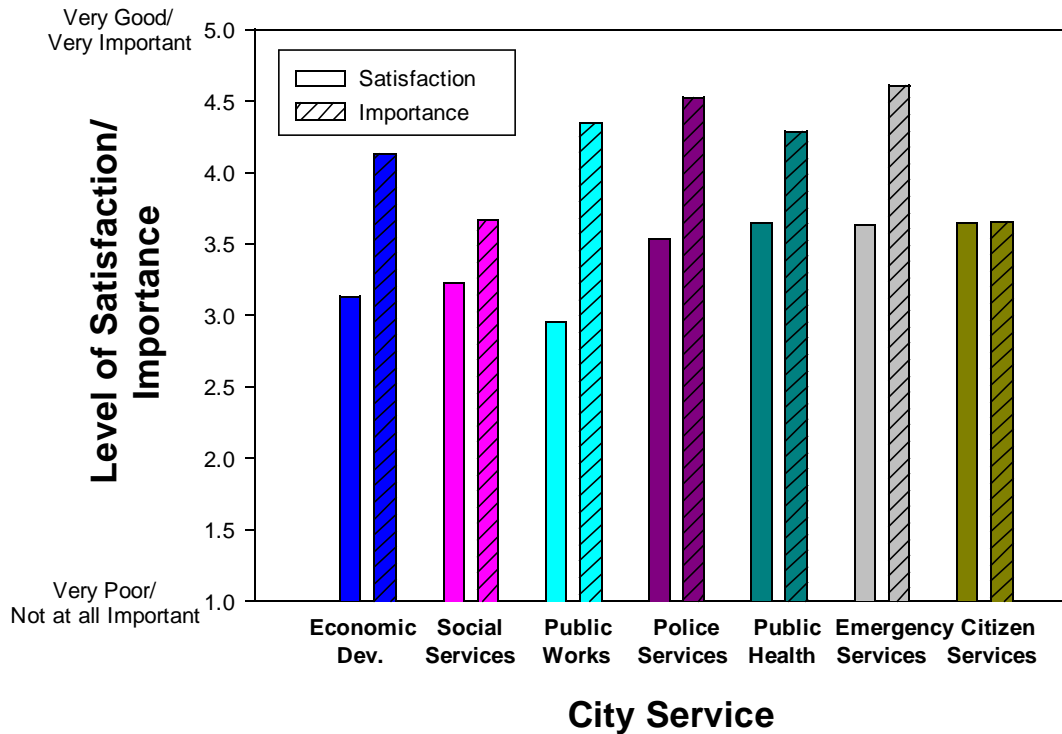
Level of Importance as a Function of City Service: Business



On level of importance, although all services were considered important, there was an effect for City Service ($p < .0001$). Respondents rated Emergency Services as most important and Social Services as least important. Importance ratings for Social Services and Citizen Services did not differ, but both were rated as less important than all other services. Importance ratings for Public Works and Public Health did not differ, but both differed from all other services. All other comparisons were significant.²

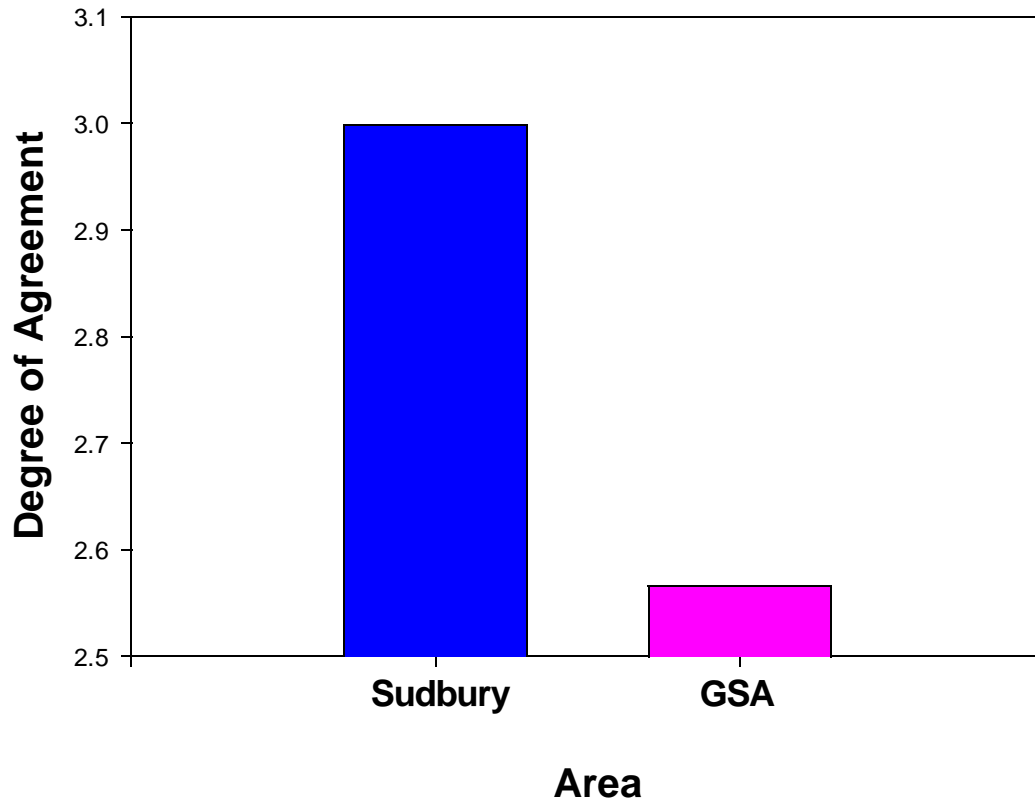
² This effect was independent of Area and Type of Business.

Levels of Satisfaction and Importance as a Function of City Service: Gaps (Business)



The largest gap between satisfaction and importance ratings was in the area of Public Works. Substantial gaps were seen in the areas of Emergency Services, Police Services, Public Health, and Economic Development & Planning. The smallest gaps were in the area of Citizen Services and Social Services. All gaps were significant at the $p < .05$ level, except in the area of Citizen Services.

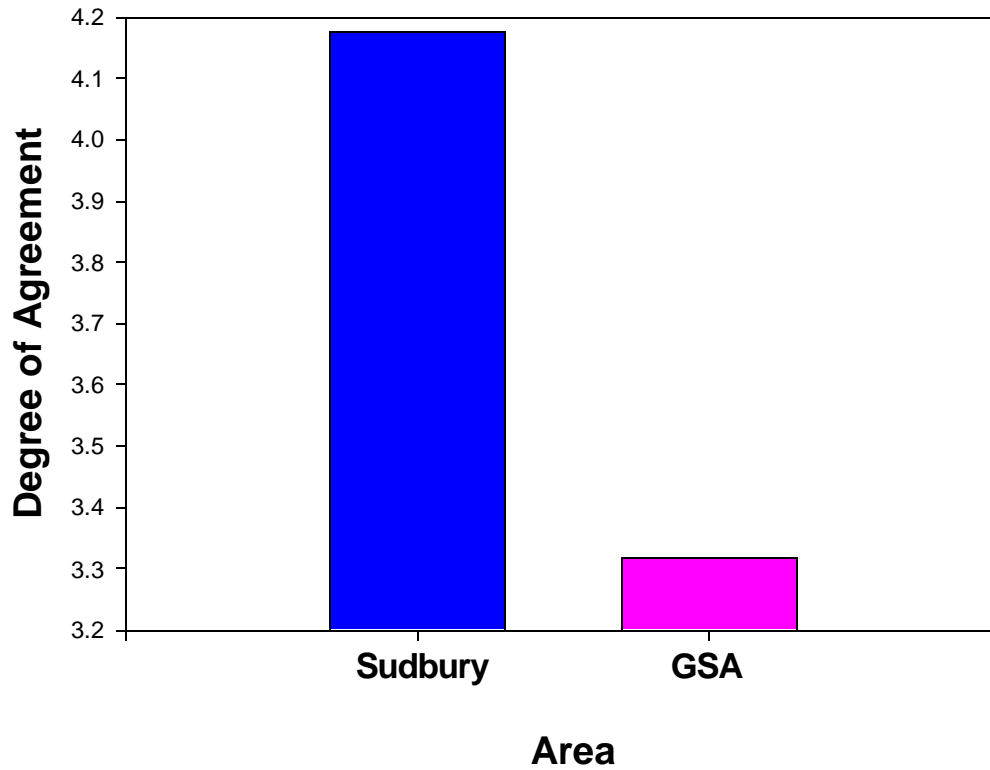
Expansion & Collaboration as a Function of Area: Business



Businesses within Sudbury agreed that they were likely to expand and collaborate to a greater degree than businesses in the GSA ($p < .08$).³

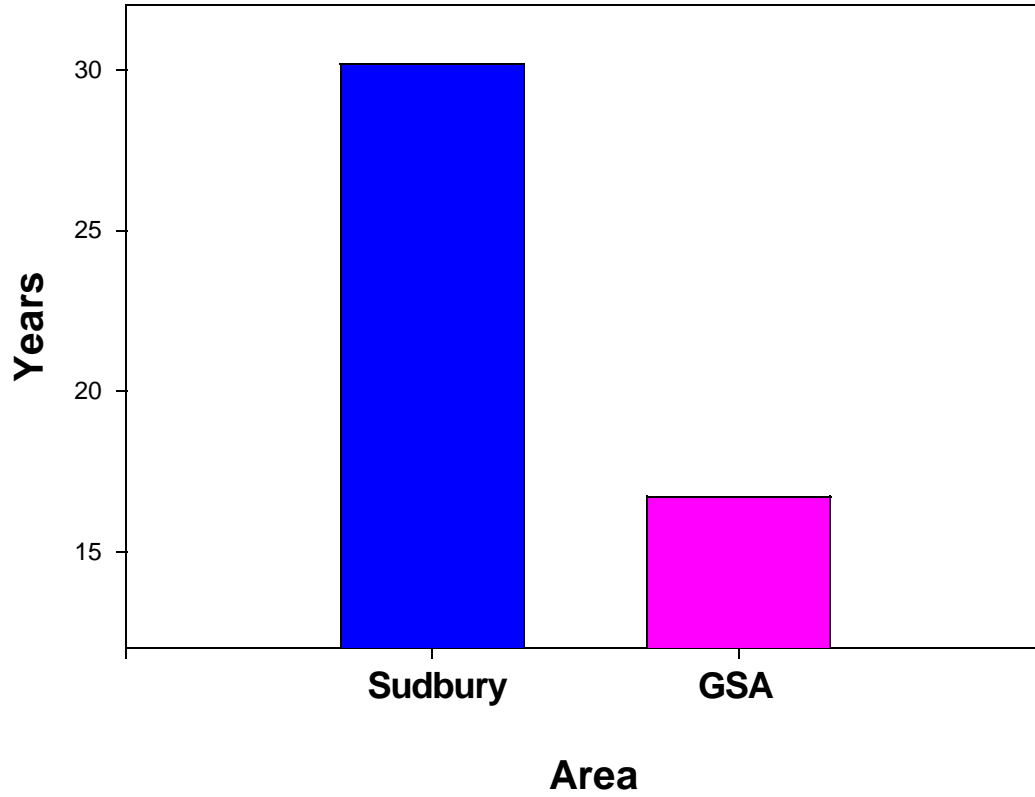
³ This measure was based on the mean of questions 68, 69, 76, and 77 (Cronbach's alpha index of internal consistency = .72).

Degree of Agreement that the Business Makes use of New Technology/Software (Q72) as a Function of Area: Business



Businesses within Sudbury agreed that they make use of new technology/software (Q72) to a greater degree than did businesses in the GSA ($p < .008$).

Years in Business as a Function of Area: Business



Businesses within Sudbury were in business longer than were businesses from the GSA ($p < .006$).

Area * Q7. Over the past year, has your business supported any volunteer, community, religious or charity organization?

		Q7. Over the past year, has your business supported any volunteer, community, religious or charity organization?		Total
		Yes	No	
Area	Sudbury	34 100.0%		34 100.0%
	GSA	57 86.4%	9 13.6%	66 100.0%
Total		91 91.0%	9 9.0%	100 100.0%

Supporting volunteer, community, religious, or charity organizations was dependent upon Area ($p < .03$). Businesses within Sudbury were more likely to have done so than were businesses from the GSA.

Area * Q57. Have you had any contact with a Municipal staff member over the last 12 months?

		Q57. Have you had any contact with a Municipal staff member over the last 12 months?		Total
		Yes	No	
Area	Sudbury	15 44.1%	19 55.9%	34 100.0%
	GSA	43 65.2%	23 34.8%	66 100.0%
Total		58 58.0%	42 42.0%	100 100.0%

Having contact with a Municipal staff member was dependent upon Area ($p < .05$). Businesses within Sudbury were less likely to have done so than were businesses from the GSA

Area * Q67. Does your business conduct business: In other provinces in Canada?

		Q67. Does your business conduct business: In other provinces in Canada?		Total
		Yes	No	
Area	Sudbury	14 41.2%	20 58.8%	34 100.0%
	GSA	12 18.2%	54 81.8%	66 100.0%
Total		26 26.0%	74 74.0%	100 100.0%

Conducting business in other provinces in Canada was dependent upon Area ($p < .02$). Businesses within Sudbury were more likely to have done so than were businesses from the GSA.

Area * Q70. Does your business have Internet access?

		Q70. Does your business have Internet access?		Total
		Yes	No	
Area	Sudbury	28 82.4%	6 17.6%	34 100.0%
	GSA	42 63.6%	24 36.4%	66 100.0%
Total		70 70.0%	30 30.0%	100 100.0%

Internet access was dependent upon Area ($p < .06$). Businesses within Sudbury were more likely to have Internet access than were businesses in the GSA.

Area * Q75. Would you like to have more Municipal Government services provided on the Internet? (i.e., paying property taxes online)

		Q75. Would you like to have more Municipal Government services provided on the Internet? (i.e., paying property taxes online)		Total
		Yes	No	
Area	Sudbury	21 70.0%	9 30.0%	30 100.0%
	GSA	30 50.8%	29 49.2%	59 100.0%
Total		51 57.3%	38 42.7%	89 100.0%

Desire for providing more Municipal Government service on the Internet was dependent upon Area ($p < .09$). Businesses within Sudbury were more likely to want to have more Municipal Government services provided on the Internet than were businesses from the GSA.

Area * D2. Is this a home-operated business?

		D2. Is this a home-operated business?		Total
		Yes	No	
Area	Sudbury	1 2.9%	33 97.1%	34 100.0%
	GSA	26 39.4%	40 60.6%	66 100.0%
Total		27 27.0%	73 73.0%	100 100.0%

Home-operation was dependent upon Area ($p < .0001$). Businesses within Sudbury were less likely to be home-operated than were businesses from the GSA.

Area * Annual Revenue

		Annual Revenue		Total
		Under \$500,000	\$500,000 or more	
Area	Sudbury	8 32.0%	17 68.0%	25 100.0%
	GSA	32 62.7%	19 37.3%	51 100.0%
Total		40 52.6%	36 47.4%	76 100.0%

Annual revenue was dependent upon Area ($p < .02$). Businesses within Sudbury were more likely to have higher annual revenues than were businesses from the GSA.

Type of Business - Related Differences

Businesses were categorized in the following manner:

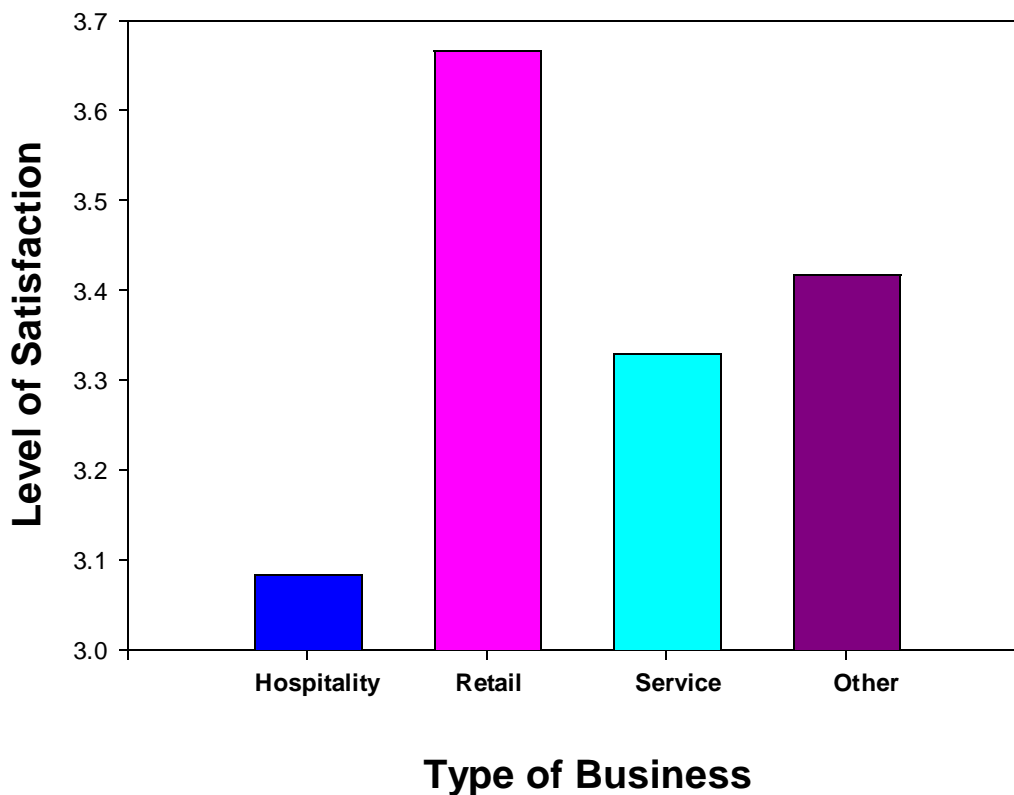
Hospitality: tourism, restaurants, lodges, hotels, bars, motels, lodges, cottages, tent grounds, entertainment and recreation, movie theatres, etc.

Retail: sell anything to the general public, except hospitality services

Service: hair dressers, barbers, travel agents, couriers, etc.

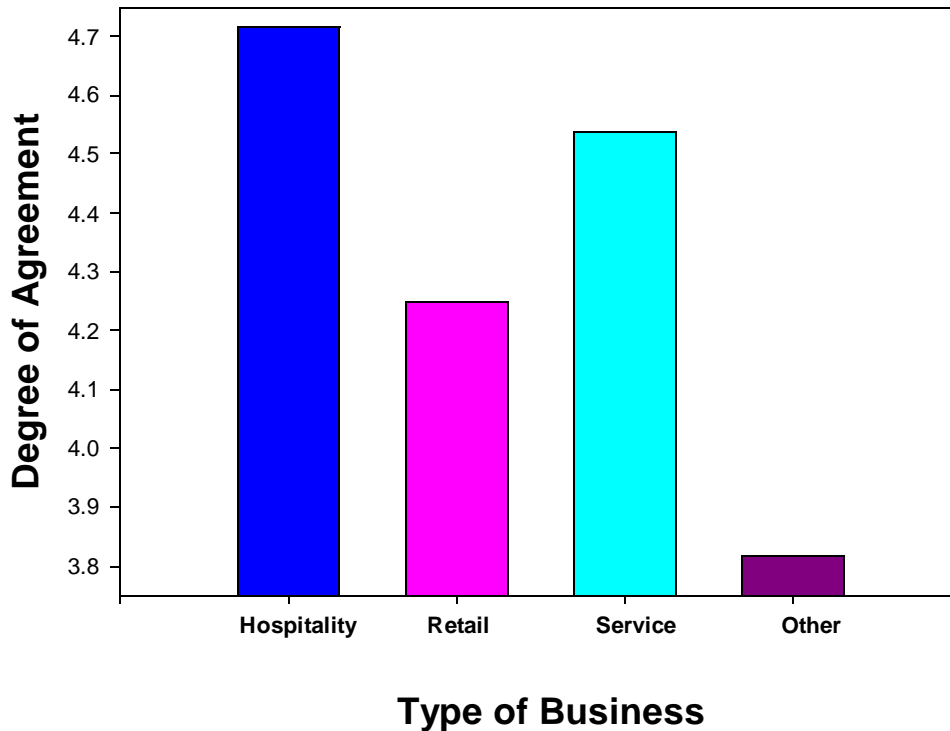
Other: communications/technology, government, manufacturing, nonprofit, professional, natural resources, transportation, wholesale, and other businesses that did not fall into the other categories.

Level of Satisfaction with City Services as a Function of Type of Business: Business



On level of satisfaction with city services, there was an effect for Type of Business ($p = .05$). Retail businesses were most satisfied and businesses involved in hospitality were least satisfied. Retail businesses were more satisfied than businesses involved in hospitality and businesses involved in service ($p < .07$). Businesses involved in hospitality also differed from "Other" businesses ($p < .08$). No other comparisons were significant.

Degree of Agreement that Rather than Building New Facilities or Roads, the City Should Invest in Maintaining and Improving Existing Facilities and Roads (Q64) as a Function of Type of Business: Business



On degree of agreement that rather than building new facilities or roads, the city should invest in maintaining and improving existing facilities and roads (Q64), there was an effect for Type of Business ($p < .02$). Whereas, on average, there was agreement with this item, businesses involved in hospitality agreed most and "Other" businesses agreed least. This difference was significant, as was the "Service" – "Other" comparison. No other comparisons were significant.

Type of Business * Q65. Does your business plan to conduct any renovations or capital projects over the next 12 months?

		Q65. Does your business plan to conduct any renovations or capital projects over the next 12 months?		Total
		Yes	No	
Type of Business	Hospitality	8 61.5%	5 38.5%	13 100.0%
	Retail	7 38.9%	11 61.1%	18 100.0%
	Service	6 21.4%	22 78.6%	28 100.0%
	Other	7 19.4%	29 80.6%	36 100.0%
Total		28 29.5%	67 70.5%	95 100.0%

Plans to conduct renovations or capital projects was dependent upon Type of Business ($p < .03$). Businesses involved in hospitality were most likely to indicate that they were planning to engage in renovations or capital projects and "Other" businesses were least likely.

Type of Business * Q70. Does your business have Internet access?

		Q70. Does your business have Internet access?		Total
		Yes	No	
Type of Business	Hospitality	10 71.4%	4 28.6%	14 100.0%
	Retail	9 45.0%	11 55.0%	20 100.0%
	Service	18 64.3%	10 35.7%	28 100.0%
	Other	33 86.8%	5 13.2%	38 100.0%
Total		70 70.0%	30 30.0%	100 100.0%

Internet access was dependent upon Type of Business ($p < .01$). "Other" businesses were most likely to have Internet access and retail businesses were least likely.

Type of Business * D2. Is this a home-operated business?

		D2. Is this a home-operated business?		Total
		Yes	No	
Type of Business	Hospitality	7 50.0%	7 50.0%	14 100.0%
	Retail	2 10.0%	18 90.0%	20 100.0%
	Service	8 28.6%	20 71.4%	28 100.0%
	Other	10 26.3%	28 73.7%	38 100.0%
Total		27 27.0%	73 73.0%	100 100.0%

Home-operation was dependent upon Type of Business ($p < .09$). Businesses involved in hospitality were most likely to be home-operated and businesses involved in retail were least likely.

Type of Business * Annual Revenue

		Annual Revenue		Total
		Under \$500,000	\$500,000 or more	
Type of Business	Hospitality	10 100.0%		10 100.0%
	Retail	4 25.0%	12 75.0%	16 100.0%
	Service	14 63.6%	8 36.4%	22 100.0%
	Other	12 42.9%	16 57.1%	28 100.0%
Total		40 52.6%	36 47.4%	76 100.0%

Annual revenue was dependent upon Type of Business ($p < .002$). Businesses involved in hospitality were more likely to have lower annual revenues and businesses involved in retail were more likely to have higher annual revenues.

Conclusions & Recommendations

- The measurement/methodological issues raised in the Advanced Analyses: Residential report apply here as well

Satisfaction & Importance

- Businesses were most satisfied with Citizen Services and Public Health
- Businesses were least satisfied with Public Works, Economic Development & Planning, and Social Services
 - Target Public Works, Economic Development & Planning, and Social Services
 - Conduct focus groups/detailed surveys to determine reasons
 - Emergency Services and Police Services were rated as most important
 - Social Services and Citizen Services were rated as least important
 - Emergency Services, Police Services, Public Works, and Public Health were rated as more important than Economic Development & Planning by businesses – it may be the case that businesses perceive Economic Development & Planning as their own venue and believe that the City should devote its resources toward maintaining and improving infrastructure
 - Conduct focus groups/detailed survey to determine reasons
 - The largest gap between satisfaction and importance ratings was in the area of Public Works
 - Substantial gaps were seen in the areas of Emergency Services, Police Services, Public Health, and Economic Development & Planning – again, businesses are convinced that a solid infrastructure is of utmost importance for a vital community
 - The smallest gaps were in the area of Citizen Services and Social Services
 - Target larger gaps
 - Businesses involved in hospitality were least satisfied with city services
 - Conduct focus groups/detailed survey to address reasons

Area of Operation

- Businesses within Sudbury were more likely to be expanding/collaborating than were businesses from the GSA (related to innovation)
- Businesses within Sudbury were more likely to make use of technology than were businesses from the GSA (related to innovation)
- Businesses in the GSA were more likely to have contacted a Municipal staff member than were businesses within Sudbury
 - Conduct focus groups/detailed survey to determine reasons
- Businesses within Sudbury were more likely to have conducted business in other provinces than were businesses from the GSA
- Businesses within Sudbury were more likely to have Internet connections than were businesses from the GSA (relates to innovation)
- Businesses within Sudbury were less likely to be home-operated than were businesses from the GSA (relates to innovation)

- Businesses within Sudbury had higher annual revenues than did businesses in the GSA

Type of Business

- Businesses involved in hospitality agree most that the city should focus on maintenance of existing facilities and roads rather than building new facilities or roads; "Other" businesses agree least
 - Conduct focus groups/detailed survey to address reasons
- Businesses involved in hospitality were most likely to be planning to engage in renovations or capital projects and "Other" businesses were least likely
- "Other" businesses were most likely to have Internet access and retail businesses were least likely (relates to innovation)
- Businesses involved in hospitality were most likely to be home-operated and businesses involved in retail were least likely (relates to innovation)
- Businesses involved in hospitality had the lowest annual revenues and businesses involved in retail had the highest

General Issues

- Focus on infrastructure (e.g., public works, public, emergency services, police services) – businesses perceive vitality as linked to these areas
- Consult and partner with the business community in the area of Economic Development & Planning
- Present primary focus should be on Public Works – large gaps and least satisfaction
- Promote the use of technology, the Internet, and collaboration/expansion – all of these issues are related to innovation