



On-line SURVEY – the Edmonton Capital Region – September/ October 2015

A few municipalities in the **Edmonton Capital Region** have expressed interest in **accelerating business attraction and collaborating** for advancing this goal. We have been asked to conduct a survey and several interviews for identifying opportunities, that is: gaps in services, impediments to recruiting and most importantly, companies prime for recruiting to the Region. The information will be used in conducting a tour scheduled for November of European prospects.

The on-line survey sample of 130 observers (and 5 interviews) is comprised of >80% identifying with the Edmonton Region. Most familiar industries are the public sector: Education and Government plus Energy and Management. Familiarity is low among these industry interests.

Q10. What industries are you most familiar? Choose up to 5.

INDUSTRIES (Population rank)	Frequency	
	#	%*
1. Government & Public Policy (5)	49	34.49%
2. Education & Research (2)	48	37.40%
3. Energy & Distribution (3)	42	31.21%
4. Management & Strategy (8)	33	23.21%
5. Environment & CleanTech (4)	27	19.59%
6. Infotech & Analytics (1)	25	20.88%
7. Construction & Real Estate (12)	25	17.98%
8. Communications & Marketing (7)	23	20.09%
9. Health & BioTech (9)	23	23.59%
10. NGO – Non Government Organization (10)	21	13.14%
11. Finance & Investment (6)	21	15.31%
12. Engineering & Design (13)	21	18.98%
13. Manufacturing & Export (18)	20	15.29%
14. Transportation & Logistics (17)	15	8.95%
15. Entertainment & Hospitality (Tourism) (16)	14	9.24%
16. Human Resources & Recruitment (11)	12	7.84%
17. Forestry & Wood Products (19)	11	7.28%
18. Agriculture & Food Processing (14)	9	8.12%
19. Legal & Security (15)	8	8.25%
Other	9	6.45%
Total Respondents	130	
*Weighted to reflect the actual number of choices - Avg. 3.46		

Q8. Location. What Alberta city do most identify with?

CITY	Frequency	
	#	%
Edmonton	102	78.46%
Calgary	10	7.69%
St. Albert	4	3.08%
Other or none	14	10.77%
Total Respondents	130	

Inter-industry Familiarity							
IF \ Then	2.	1.	3.	4.	13.	17.	
2.Education	+	o	o	o	o	o	
1.Government	o	+	o	o		o	
3.Energy	o	o	+	o	o		
4.Management	o	o	o	+	o	o	
13.Manufacturing					+		
17.Forestry							+

OBSERVATIONS. Familiarity is low among the most familiar industries.

Familiarity is highest for the public sector: Government, Education (and Research), and also Energy and Management. Familiarity with Tourism, Human Resources, Forestry, Agriculture and Legal are lowest. Familiarity with Construction, Manufacturing and Human Resources is stronger than for the overall population surveyed (Ranked 5 higher); InfoTech and Finance is weaker (Ranked 5 lower)

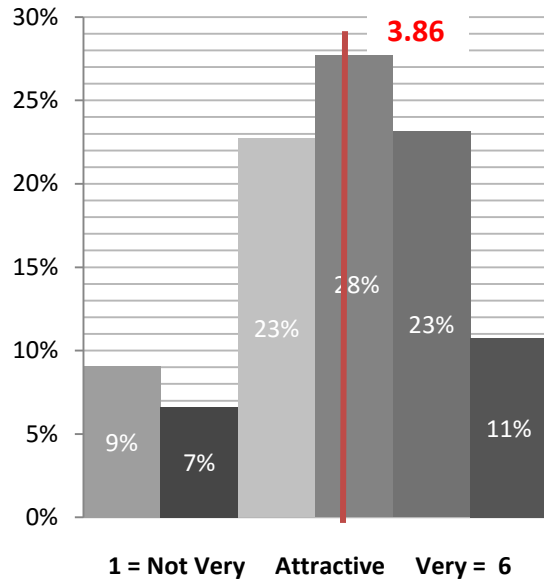
SIGNIFICANT (95% confidence). Inter-industry familiarity

- If **Government** (N=215), then less familiar (o) with Education (22), Management (17), Energy (16), and Forestry (6)
- If **Education** (N=203), then less familiar (o) with Government (22), Energy (14), Management (11), Forestry (7), and Manufacturing (2)
- If **Energy** (N=182), then less familiar (o) Government (16), Education (14), Manufacturing (9), and Management (8)
- If **Management** (N=145), then less familiar (o) with Government (17), Education (11), Manufacturing (8), Energy (8), and Forestry (0).

The Edmonton Region is viewed as more attractive than not 3:2, averaging **3.86**: 6:00

Q1. Is the Edmonton Region attractive to do business?

N = 129



Key word search – most frequently (>4%) mentioned

[Making](#) (5.69%) [City](#) (15.45%) [Good Infrastructure](#) (4.88%) [Place](#) (5.69%)
[Education](#) (6.50%) [Edmonton](#) (17.89%) [Work Force](#) (5.08%)
[Service](#) (6.50%) [Good](#) (15.45%) [Sector](#) (4.87%) [Costs](#) (9.76%) [Oil](#) (8.94%)
[Work Force](#) (5.08%) [Business](#) (22.76%) [Support](#) (4.25%)
[Markets](#) (10.57%) [Transportation](#) (8.13%) [Calgary](#) (4.07%)
[Industry](#) (8.13%) [Resources](#) (6.50%) [Growth](#) (5.69%) [Region](#) (9.76%)
[Lots](#) (6.50%) [Economy](#) (8.13%) [People](#) (4.87%) [Government](#) (7.30%)

OBSERVATIONS

The average response of 3.86 on a scale of from 1 to 6, positions the Edmonton Region as more attractive than not – a skewing of the distribution to the right – 39% vs 61%. Note that the most negative - 9%, stand out as deviant from the norm. The negative sentiments as expressed in comments contrast with the positive sentiments:

- Positive:** Transportation and land, educated workforce and the quality of life in the Region are attractive features.
- Negative:** Political and industry leadership, innovation and industrial diversity are lacking.

Most positive sentiments – the top 11%: Transportation and land, educated workforce and the quality of life attractive.

- Complete support system available, from University and College resources, to invest firms and capital \$ availability, to Govt. centre for regulatory information, to an aggressive and positive Municipal Govt..
- My clients are suppliers of products and services to the oil sands industry. Edmonton has many potential clients for my company.
- Good available land; strong airport and rail facilities.
- Good labour market and access to markets is good and improving
- Full range of possibilities from industrial to tech.
- The hub for oil sands. Need to maintain stable economy and need more jobs here. The business will help in creation of more jobs.
- Diverse community, large industry base, good place to live
- We have great quality of life, education, healthcare. Strong service and professional service sector
- Current and planned growth activity that will actually happen. This growth will ensure that Edmonton Region will attract young people, whether professional or trades. They, in turn will have families and will need, can afford and will use amenities. This means growth of primary (resource for example), secondary and tertiary industry, giving the entire package needed for success of all categories of business.
- Educated labour force, good transportation routes/ connections
- Geographic hub in western Canada with lots of labourers
- Costs are lower for everything from taxes to housing. Vibrant city with many amenities.
- Access to many markets, lovely social scene, reasonable costs, educated workforce, great recreation, nice size, progressive leadership
- Good transportation infrastructure, available labor and land.

Most negative sentiments - the bottom 9%. Political and industry leadership, innovation and diversity lacking.

- Not very diversified market
- Mayor and Council are totally unprofessional and out to lunch
- Lack of head offices. No flagship world leading corporations. Blue collar ecosystem. Lack of innovation. No engineered products. Local focus. Too many lifestyle firms.
- Edmonton Mayor and council do not entice synergy. Any comments about working together are rhetorical. I'm involved in innovation and Chinese investment for over 25 years and would never consider Edmonton because of it's political leadership
- Taxes, operating are much higher in comparison to USA manufacturing, and additional stress in markets due to politics or Oil and gas controls is effecting domestic markets
- Recession-Government City; Rental Market Terrible for landowners like myself-have a condo near U of A - for rental -no response for 3 months
- The city is not up to international standards sub-standard roads, crosswalks, lighting, traffic flow, city services high taxes. not a great walking city.
- Edmonton as a city does very little to advance the Innovation and Diversification file, clearly in the lowest quartile in Canada. Overall, Edmonton provides near zero "CIVIC Capital" to nurture and help grow technology-based, emerging sector companies - there is simply no interest in such; Edmonton focuses on Oil & Gas, Forestry and Agriculture. To try and suggest that Edmonton is a "Smart City" or wishes to be part of a knowledge-based economy is unrealistic.
- Becoming a very dirty place
- Too far away from everything, no incentive to locate i.e. no tax breaks, no grants, or subsidies to build here; commercial rents are too high; labour geared toward service and oil and gas; no connectivity to other like businesses; no tech hubs; universities not producing tech savvy graduates.

Domestic service industries of Health, Environment, Engineering and Education are **prime targets for growth** in the Edmonton Region. Also, but less so, are export oriented Agriculture and Transportation, Energy and Manufacturing, plus Infotech

Q3. What industries would you recommend as prime targets for Regional growth? Choose up to 5.

INDUSTRY GROWTH TARGETS	Frequency	
	#	%*
1. Health & BioTech	79	62.94%
2. Environment & CleanTech	78	62.94%
3. Education & Research	62	47.59%
4. Engineering & Design	61	43.47%
5. Agriculture & Food Processing	51	37.55%
6. Transportation & Logistics	49	33.87%
7. Energy & Distribution	49	36.44%
8. Manufacturing & Export	48	39.16%
9. Infotech & Analytics	47	37.14%
10. Entertainment & Hospitality (Tourism)	27	19.77%
11. Government & Public Policy	24	17.00%
12. Construction & Real Estate	22	16.31%
13. Finance & Investment	22	14.67%
14. Management & Strategy	21	12.35%
15. Forestry & Wood Products	20	14.64%
16. Communications & Marketing	18	10.81%
17. NGO – Non Government Organization	17	11.15%
18. Legal & Security	10	6.58%
19. Human Resources & Recruitment	9	4.62%
Total Respondents	130	
*Weighted to reflect the actual number of choices– Avg. 5.49		

OBSERVATIONS – Important to distinguish service from resource industries

Prime and significant (95% confidence) industry targets for Regional growth are Service industries: Health & Biotech, Environment & CleanTech, Education & Research and Engineering & Design. Also favoured - but less so, are: Resource industries: Agriculture, Transportation, Energy, Manufacturing and Infotech.

SIGNIFICANT (Confidence 95% More; High >40%)

- **More:** Health, Environment, Education, Engineering, Agriculture, Transportation, Energy, Manufacturing, Infotech
- **Education** is more prime than Agriculture
- **Energy** is more prime than Infotech
- **Manufacturing** is on the cusp with support from Energy and Transportation
- **Infotech** is on the cusp with support from Education.

Among observers recommending the top 9 industry targets, confidence was highest for Manufacturing and Environment and lowest for Engineering and Transportation.

Key word search for Comments(15) most frequently (>4%) mentioned

[Entertainment](#)_(13.3%) [Industries](#)_(13.3%) [Arts](#)_(13.3%)

Distance to Market, Leadership (government) and Economic uncertainty are impediments to attracting businesses to the Region and to a lesser extent Weather – the climate and

Q4. Are any of the following impeding the attraction of businesses to the Region? Choose up to 5.

IMPEDIMENTS - ATTRACTION	Frequency	
	#	%*
1. Distance to Market	65	52.09%
2. Leadership and a vision	64	51.83%
3. Economic uncertainty/ volatility	55	43.61%
4. Weather – the climate	52	44.46%
5. Transportation and logistics	46	34.42%
6. Cost of doing business	39	26.90%
7. Economic diversity	36	28.79%
8. Private investment financing	33	27.06%
9. Labour supply	31	24.57%
10. Public financial incentives	26	16.92%
11. Business regulations	24	18.85%
12. Taxes	21	15.33%
13. Research services	19	13.66%
14. Access to materials/ resources	12	7.91%
15. Quality of life	11	7.89%
16. Health and education services	8	5.19%
17. Cultural diversity	8	6.42%
Other	22	17.05%
Total Respondents	129	
*Weighted to reflect the actual number of choices – Avg. 4.26		

Key word search for Other (22) – most frequently (>4%) mentioned

[Edmonton](#)(13.64%) [Policy](#)(9.09%)

[Leadership](#)(9.09%) [Business](#)(13.64%)

[Culture](#)(9.09%) [Town](#)(9.09%) [Council](#)(13.64%)

[Provincial Government](#)(13.64)

OBSERVATIONS - Important to distinguish fixed from manageable impediments in attracting businesses and industry differences.

Impediments to attracting business to the Region that are fixed include: distance to market and the weather. Other, manageable impediments are: Leadership and Economic uncertainty, the later a feature is associated with government leadership and the oil and gas industry that may also explain concern with: business costs and labour supply, transportation and private investment financing. Low are domestic services: culture, health and education, quality of life, and access to resources.

SIGNIFICANT (More Confidence 95%; High >40%) industry impediments

- **More:** Distance, Leadership, Economic uncertainty, Weather, and Transportation
- If **Health** – High: distance (57%), leadership (52%), and weather (48%)
- If **Environment** - High: distance (52%), economy (48%), leadership (44%), and costs (44%)
- If **Education** – High: leadership (46%), distance (44%), and economy (40%),
- If **Engineering** – High: leadership (62%), transportation (48%), and distance (43%)
- If **Agriculture** – High: leadership (67%), private \$ (56%), costs (44%), distance (44%), and transportation (44%)
- If **Transportation** – High: economy (60%) and leadership (53%)
- If **Energy** – High: economy (66%), distance (46%), and leadership (51%)
- If **Manufacturing** – High: leadership (55%), distance (50%), weather (50%), economy (40%), and costs (40%)

In addition to Weather – the climate, Leadership and Economic uncertainty/ volatility plus Distance to market and Economic diversity are impediments to **recruiting talent to the Region.**

Q5. Are any of the following impeding the recruitment of talent to the Region? Choose up to 5.

IMPEDIMENTS - RECRUITMENT	Frequency	
	#	%
1. Weather – the climate	78	81.58%
2. Leadership and a vision	53	43.36%
3. Economic uncertainty/ volatility	50	37.73%
4. Distance to market	39	30.41%
5. Economic diversity	34	25.79%
6. Quality of life	24	17.73%
7. Cost of doing business	22	16.15%
8. Transportation and logistics	20	13.96%
9. Labour supply	17	15.08%
10. Business regulations	16	11.09%
11. Private investment financing	14	10.37%
12. Taxes	13	10.12%
13. Public financial incentives	11	7.69%
14. Research services	10	6.15%
15. Cultural diversity	10	7.39%
16. Access to materials/ resources	7	4.80%
17. Health and education services	5	4.52%
Other	24	19.04%

Total Respondents 123

***Weighted to reflect the actual number of choices – Avg. 3.44**

OBSERVATIONS – Important to distinguish impediments to recruiting talent may differ between industries.

Impediments to **recruiting talent** to the Region that are fixed include: weather primarily followed by distance to market. Other manageable impediments include: leadership, economic uncertainty and economic diversity. Quality of life may be a concern but contrasts with cultural diversity and services of health and education, research, resource access, and public financial incentives.

SIGNIFICANT (Confidence 95% More; High >40%) industry impediments

- **More:** Weather, Leadership, Economic uncertainty, Distance, Economic diversity
- If **Energy** is a target, then economic uncertainty (49%), weather (67%), and leadership (51%) are impediments to recruiting
- **Weather** - High for every industry except Infotech (35%) and Forestry (36%)
- **Leadership** – High for every industry except: Communications (39%), Legal (37%), Entertainment (36%), Transportation (36%), NGOs (33%), Agriculture (33%), and Construction (32%)
- **Economic uncertainty** – High for every industry except Infotech (39%), Communications (39%), Finance (38%), Health (35%), NGOs (24%), and Forestry (18%)
- **Distance to market** – High for Engineering (50%), Manufacturing (50%), and Legal (50%),

Key word search for **Other (24) – most frequently (>4%) mentioned**

Opportunities_(16.67%) Boring_(8.30%) Housing_(12.50%) People_(12.50%) Region_(16.67%)
Government_(16.67%) Foreign_(8.33%) Labour_(12.50%)

Economic uncertainty/ volatility and Leadership (government) are prime Impediments to the retention of companies in the Region in addition to Distance to market, Labour supply and Cost of doing business.

Q6. Are any of the following impeding the retention of companies in the Region? Choose up to 5.

IMPEDIMENTS - RETENTION	Frequency	
	#	%
1. Economic uncertainty/ volatility	57	49.30%
2. Leadership and a vision	56	48.52%
3. Distance to market	47	34.58%
4. Labour supply	41	35.42%
5. Cost of doing business	40	26.17%
6. Taxes	27	22.63%
7. Weather – the climate	27	16.85%
8. Economic diversity	26	17.04%
9. Transportation and logistics	26	18.60%
10. Private investment financing	23	18.70%
11. Business regulations	22	15.62%
12. Public financial incentives	21	18.70%
13. Quality of life	11	8.86%
14. Access to materials/ resources	11	6.06%
15. Cultural diversity	8	5.65%
16. Research services	7	3.68%
17. Health and education services	1	0.40%
Other	18	14.75%

Total Respondents 118

***Weighted to reflect the actual number of choices – Avg. 3.82**

OBSERVATIONS – Important to distinguish impediments to retaining companies may differ between industries.

Impediments to retention of companies in the Region include distance to market and the Region’s economic uncertainty associated with the oil and gas industry and new government leadership and associated labour supply, cost of doing business. These contrast with health and education services, research services, cultural diversity, access to resources and quality of life.

SIGNIFICANT (Confidence 95% More; High >40%) industry impediments

- **More:** Economic uncertainty, Leadership, Distance, Labour, and Cost
- **Economic uncertainty** –High for every industry except Finance (35%), Management (31%), NGOs (32%), and Agriculture (12%)
- **Leadership** – High: for every industry except Entertainment (36%), and Agriculture (25%)
- **Distance to market** – High: Engineering (62%), Infotech (55%), and Health (48%), Manufacturing (45%), Finance (45%), Education (44%), Human Resources (42%), and Energy (41%)
- **Labour supply** –High: Environment (42%), Finance (40%), Health (43%), Agriculture (63%), Legal (57%), Tourism (43%), Manufacturing (45%), and Forestry (50%)
- **Cost of doing business** – High: Agriculture (63%), Legal (57%), Environment (42%), Finance (40%), Health (43%), Tourism (43%), Manufacturing (45%), and Forestry (50%)

Key word search – most frequently (>4%) mentioned

[Provincial Government](#)_(11.11%) [Planning](#)_(11.11%)

[NDP Government](#)_(16.67%) [Business](#)_(11.11%)

Few companies were identified for relocating to the Edmonton Region. Prime industries of interest include: Infotech and Health & Biotech, Manufacturing and Transportation. Oil and gas dependency and the new NDP Government are concerns.

Q9. Please identify any company(s) that you view as prime for relocating to the Edmonton Capital Region?

Key: Infotech(10), Health(9), Manufacturing(7), Transportation(6), Engineering(4), Energy(3), CleanTech(3), Finance(3), Education(2), Entertainment(1), Agriculture(1), Government(1), Communications(1)

T - Air and Rail Transportation
 A - Any advanced AgriFood grower (greenhouses) or processor
 M - Any battery manufacturer or manufacturers in general.
 M - Any manufacturing company.
 H - Big pharmaceutical and medical device companies
 H,I - Bio tech/nano tech/robotics
 E,C - Clean energy technology such as solar and geothermal
 H,I - Data and analytics, health care services
 I - Dell just acquired EMC.
 Eng - Engineering design companies
 F, E,Eng,T - Foreign banks, Methanex, SNC Lavelin , aerospace firms
 Ent,H,Ed,I - Game programming, nursing schools, drama schools
 M - GE
 M - There was news about GE transferring its manufacturing to Canada.
 Eng - Golder Associates--probably already have an office here
 I - Google
 G - Government
 H,I - Health IT
 H - Health research; biomaterials
 I, Ed - Knowledge economy
 T - Logistics gateway to ice free NW passage
 F - Major financial institution
 M - Manufacturers of innovative technologies for local and export.
 H,M - More drug manufacturing. Electronic manufacturing
 I - NextIT Inc. from Spokane Washington.
 H - Novozymes
 C,Eng - PCL
 H - Pharmaceutical
 Com, I - Skypoint (Communications)
 E,M - Solar companies, refining of natural resources
 T,C,I - Tesla, Any Clean Energy Emerging Leader, Google, Amazon
 T - Transportation
 T,F - Transportation and logistics taking advantage of our geographic location as the first major population centre inland from Prince Rupert, and as a hub linking the coast, Northern Canada, the oil sands, south to Calgary and east through Winnipeg to the United States, all make us prime to go after major transportation/pipeline companies. We also have a cluster of financial institutions that create a critical mass of talent that could be attractive.

Key word search – most frequently (>3%) mentioned

[Tech](#)(3.77%) [Google](#)(3.77%) [Oil](#)(13.21%) [Clean Energy](#)(3.77%)

[Pharmaceutical](#)(3.77%) [Companies](#)(13.21%) [Health](#)(5.66%)

[Manufacturing](#)(13.21%) [Financial](#)(3.77%)

[Logistics](#)(3.77%) [Transportation](#)(5.66%) [Economic](#)(3.77%)

- Nothing in the Oil and gas
 - Oil patch chose Calgary en masse for a reason. Address those reasons and perhaps head offices would move closer to their work
 - There are many, but we need to think outside the box, and get away from being married to the oil industry
 - Need to shake out of oil/ag/forestry focus that have low growth prospects
-
- Soon to have lots of vacancy downtown. Create a start-up alley on Jasper Ave.
-
- None, during the current economic situation
 - None since arrival of Alberta NDP government
 - Unfortunately we have the NDP government which is a major speed bump in economic terms.
 - None would consider Edmonton.

HIGHLIGHTS

Recommendation. 1. Cross-industry engagement with government for planning Regional diversification of the economy through prime industry targets, 2. tackle specific initiatives for addressing manageable impediments for attracting, recruiting talent and retaining business, 3. Regional leaders in both industry and government should celebrate and acknowledge the Region’s services and socio-cultural features.

ATTRACTIVE? The Region is viewed as attractive to do business citing: transportation infrastructure and land available plus the Region’s educated workforce and the quality of life. The most negative sentiments include political and industry leadership and the lack of innovation and diversity. Additional sentiments include the new NDP Government’s economic policies and economic uncertainty associated with the volatile oil and gas industry.

INDUSTRY FAMILIARITY? Inter-industry familiarity is low for government, education, energy and management.

GROWTH? Industry growth targets are reinforced ✓ when asked respondents were asked to identify companies:

PRIME INDUSTRY GROWTH TARGETS - EDMONTON REGION
Health & BioTech ✓
Environment & CleanTech
Education & Research
Engineering & Design
Agriculture & Food Processing
Transportation & Logistics ✓
Energy & Distribution
Manufacturing & Export ✓
Infotech & Analytics ✓

IMPEDIMENTS? The Edmonton Region’s Distance to market and Weather are fixed impediments. Manageable impediments include Leadership and vision in the face of Economic uncertainty and inter-related issues of the Cost of doing business, Labour supply and Economic diversity.

Attraction	Recruiting	Retention
Distance to Market	Weather – the climate	Economic uncertainty/ volatility
Leadership and a vision	Leadership and a vision	Leadership and a vision
Economic uncertainty/ volatility	Economic uncertainty/ volatility	Distance to market
Weather – the climate	Distance to market	Labour supply
Transportation and logistics	Economic diversity	Cost of doing business

Least frequently cited are the Region’s socio-cultural, research and resourcing features:

Research services	Public financial incentives	Quality of life
Access to materials/ resources	Research services	Access to materials/ resources
Quality of life	Cultural diversity	Cultural diversity
Health and education services	Access to materials/ resources	Research services
Cultural diversity	Health and education services	Health and education services

