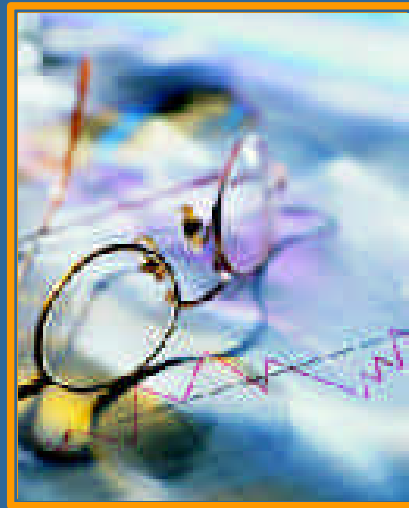


Municipal On-Line Directory Survey Results



Prepared For:
The Breken Group

Prepared By:
Gary Edwards

October, 2002

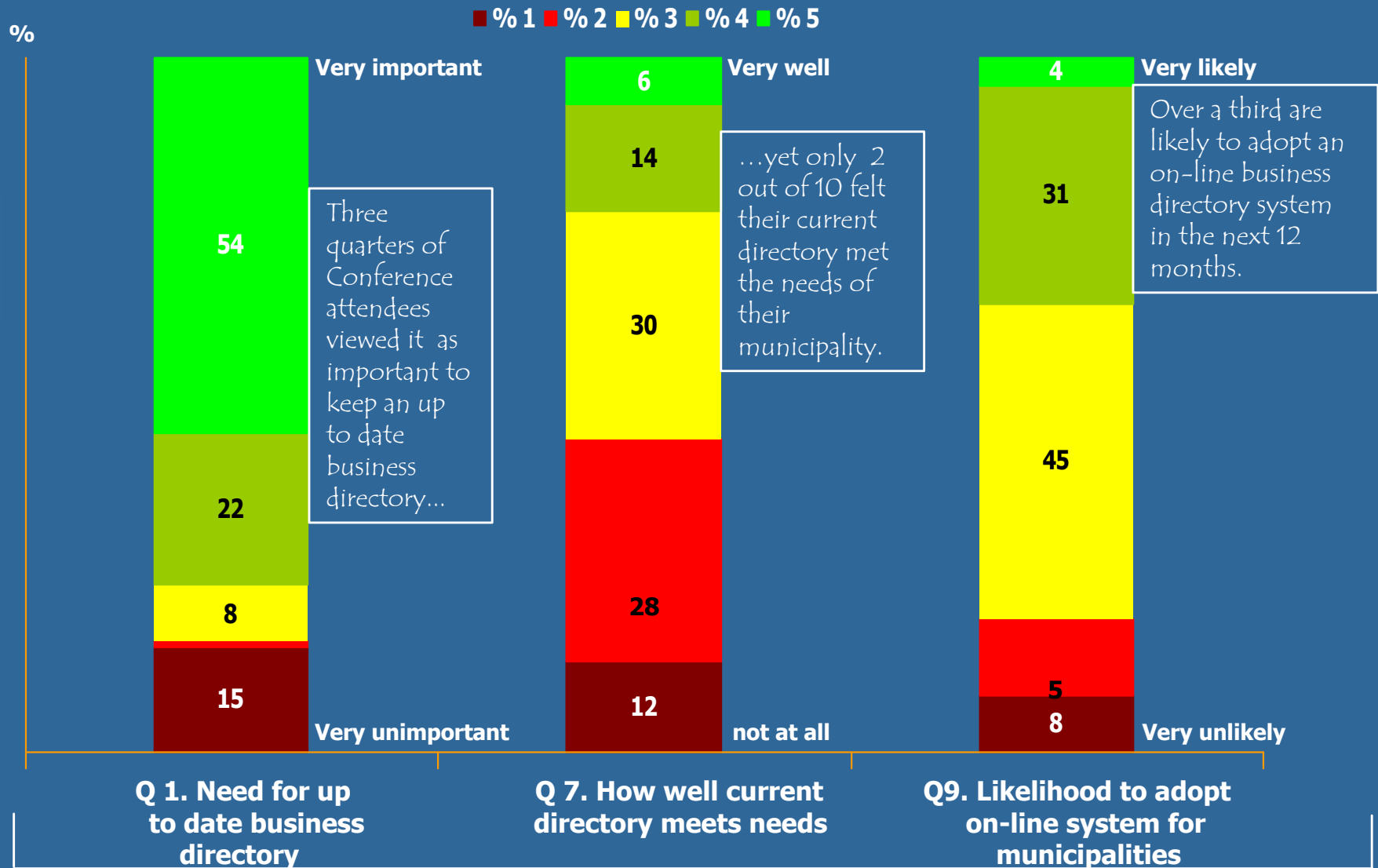
Introduction

- **The Breken Group commissioned Contestix to undertake research on the state of municipal on-line business directories.**
- **The objectives of the survey were as follows:**
 - 1) benchmark municipal business directories,**
 - 2) determine on-line directory options in the marketplace, and**
 - 3) estimate the adoption rate of on-line municipal business directories.**

Methodology

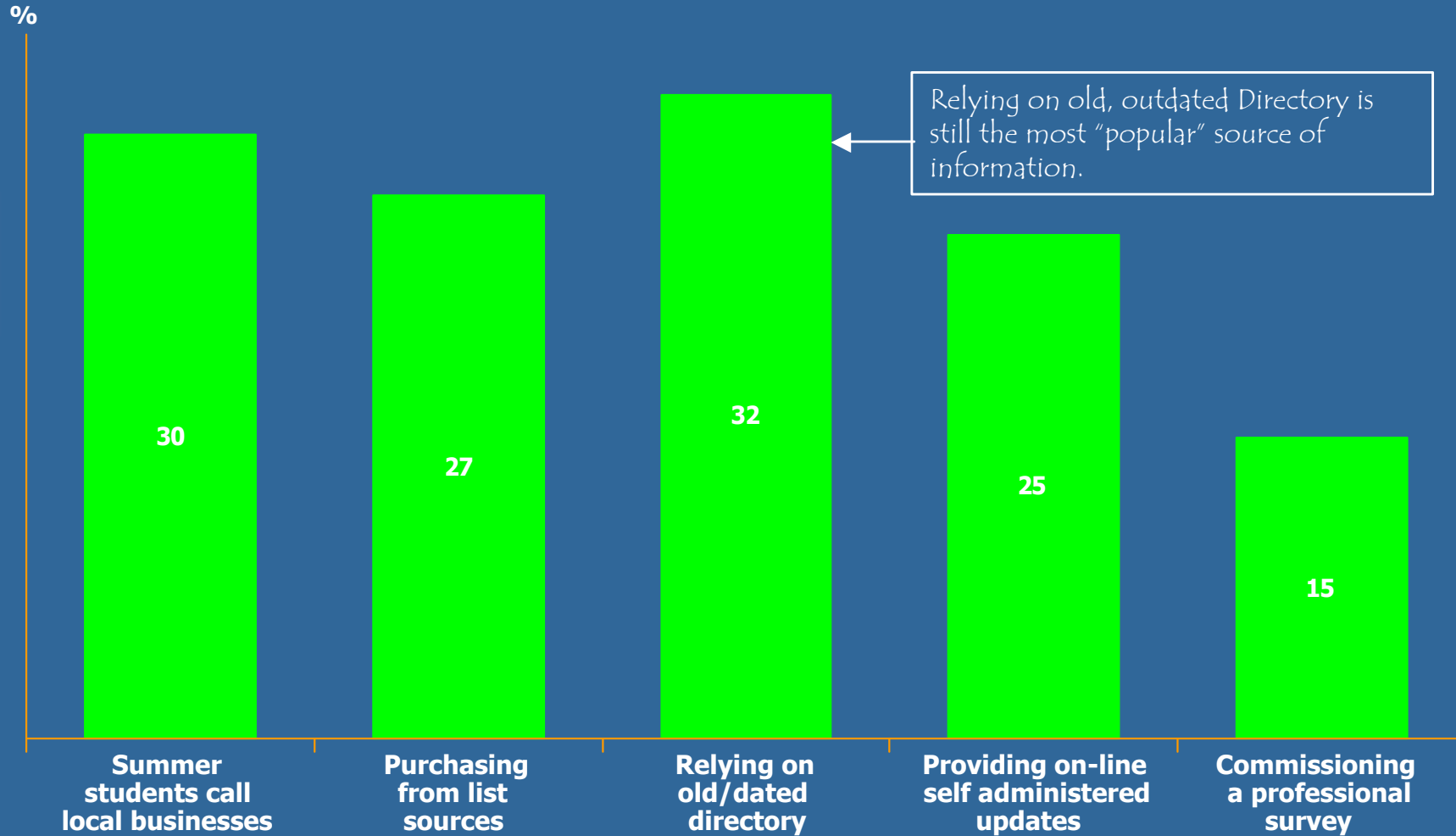
- ☞ **Participants at the IEDC Trade Show held in Oakland, USA and the Canadian Economic Development Conference held in PEI, Canada were surveyed in September 2002.**
- ☞ **The survey was conducted via the Contestix Web Site through an on-line email solicitation.**
- ☞ **In total, 157 Conference attendees completed a survey.**

Need for an On-line Municipal Business Directory © The Breken Group, 2002



Key Outcome Variables

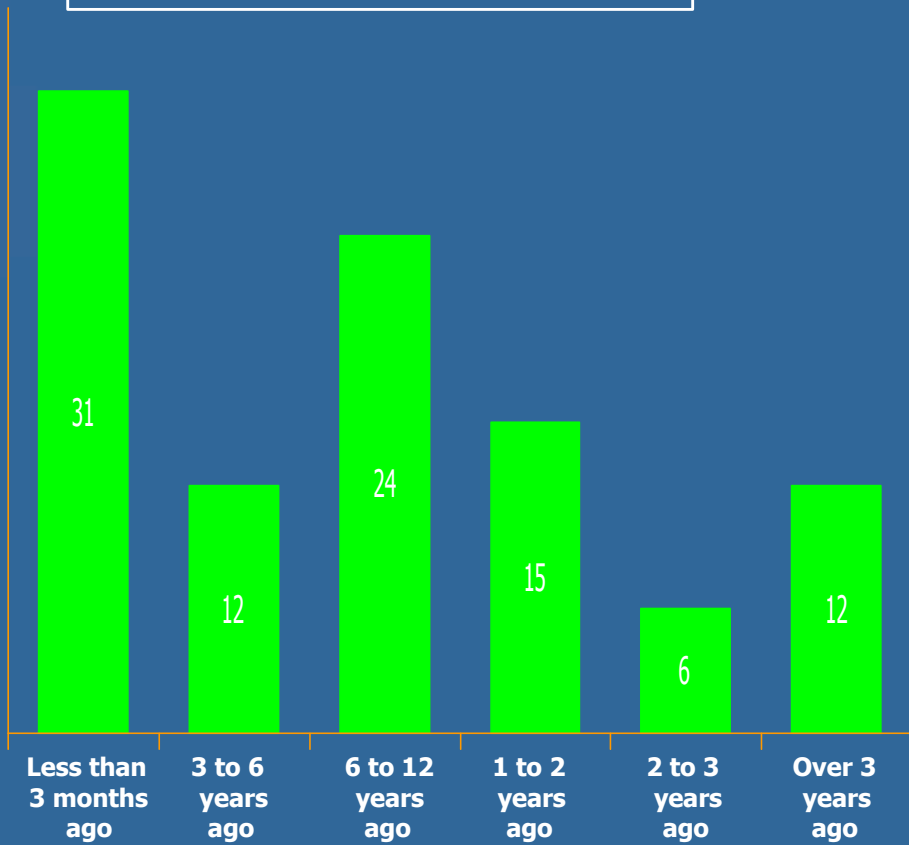
Methods of Data Collection



Data Integrity

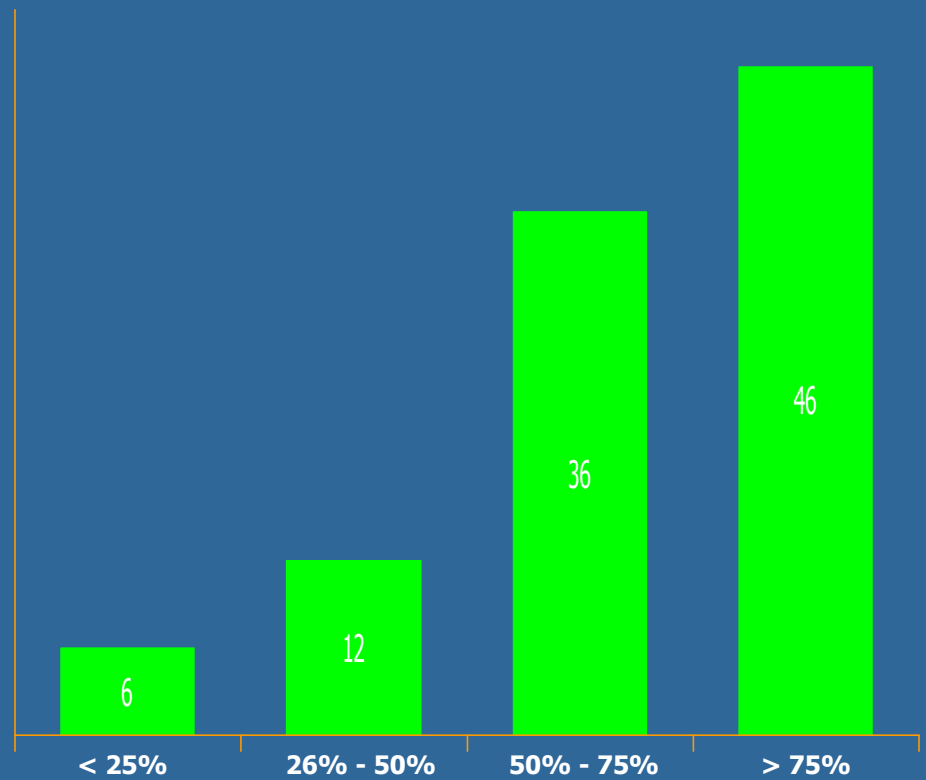
Notably, nearly 7 out of 10 municipalities have updated their directory within the past 12 months...

%



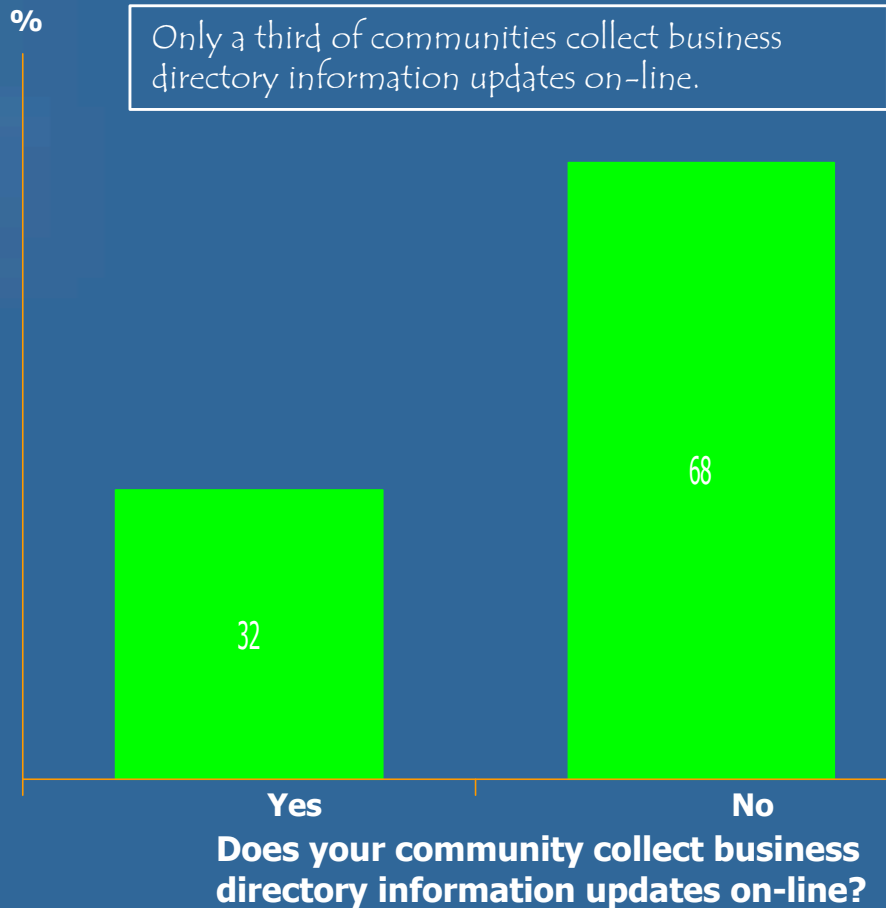
Last Time Municipal Business Directory was Updated

...however, less than 50% have a directory that is greater than 75% complete.



Comprehensiveness and Completeness of Municipal Business Directory

Collecting Business Directory Information On-Line



How is the Business Directory Made Available to Site Selectors and the Public?

On a paper based directory	76%
On-line	52%
On a CD Rom	24%

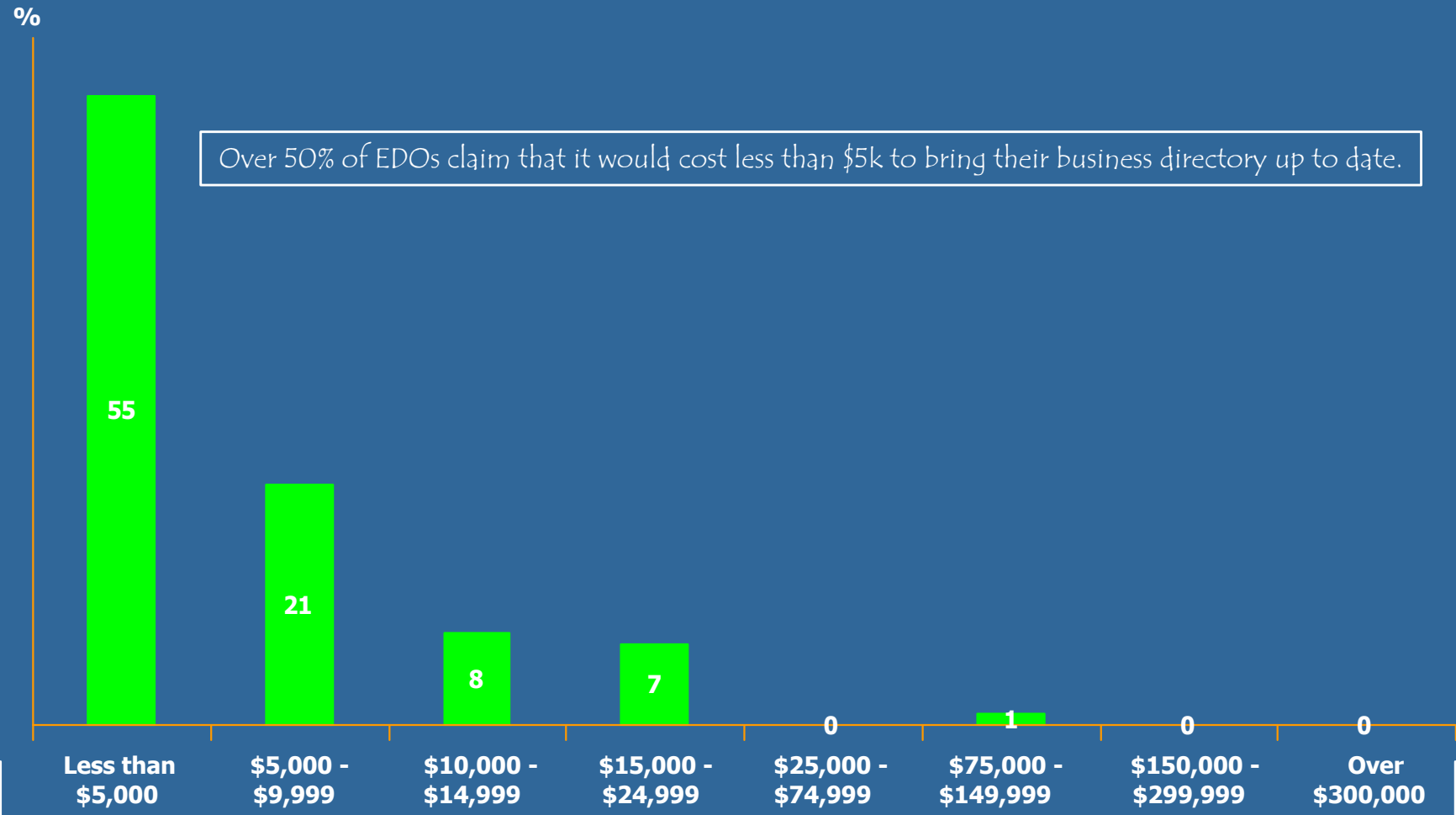
If on-line, how was it developed?

Developed by a local contactor	42%
Developed in-house	32%
Purchased existing software	8%

Is there a fee charged for access to the data?

Yes	25%
-----	-----

Estimated Costs



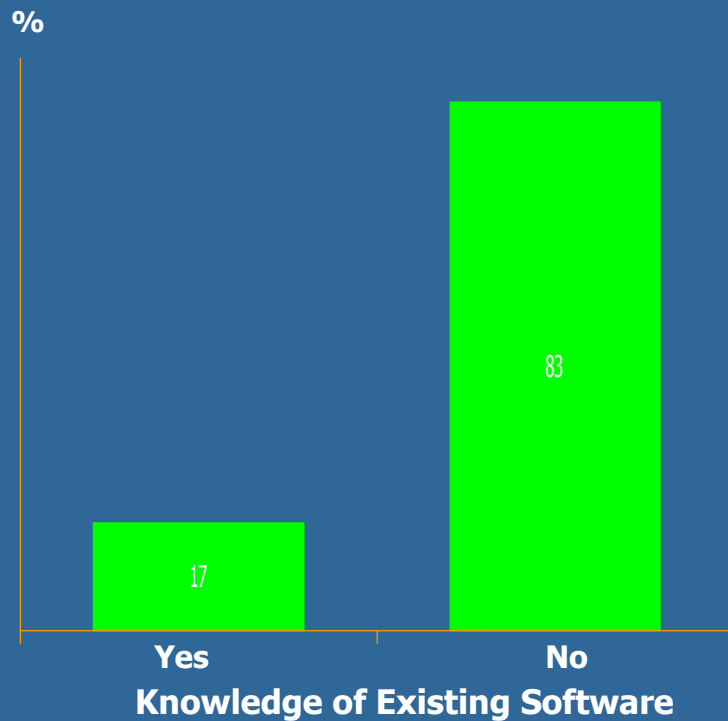
Cost to Bring Business Directory Up to Date Using Current Method

Existing Business Directory Software

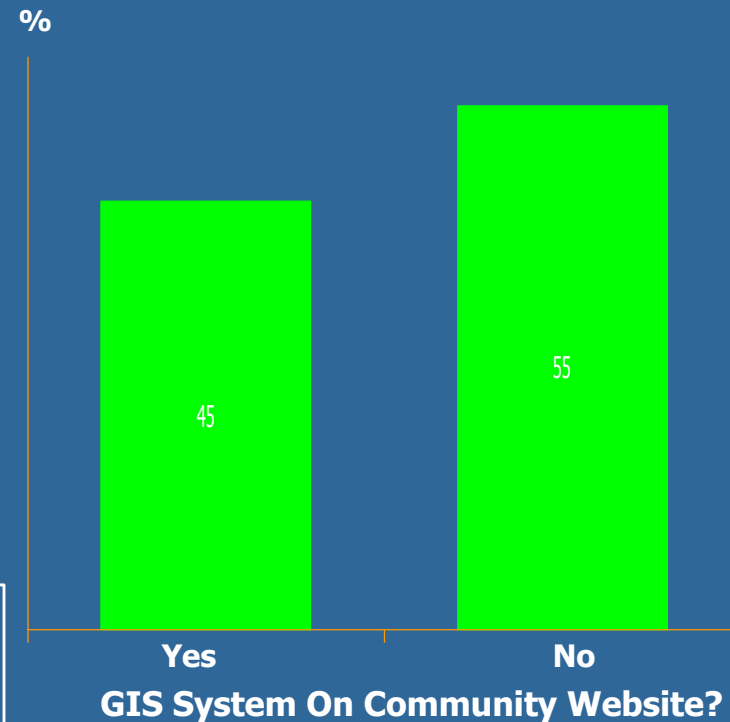
Less than 2 out of 10 individuals surveyed were aware of any existing software to automate business directory data and provide reports for EDOs.

Of those who were aware of existing software, usage was limited to "in house" development and to partial solutions such as databases or contact managers, not an EDO specific, full service solution.

- In house development (n=52)
- Local contractor (n=32)
- Database software e.g., ACT, FoxPro, Excel, Goldmine (n=6)
- Proprietary solutions e.g., AlbertaFirst (n=6)



Just under half of communities currently have, or within 6 months intend to have, a GIS System incorporated into their community website.



On-Line Services

Importance of On-Line Services

EDOs view the #1 value of an on-line system as providing up to date information

Up to date information

Generate statistical reports

Seamless link to region's website

Search capabilities for local business products and services

Local events calendar

Ability for businesses to update their contact information

Search capabilities for local business addresses

Same look and feel as your region's website

Comprehensive product and service information

Ability to contact targeted groups to disseminate information

Surveying capabilities of local businesses and organizations

Information on regional Clustering

Search capabilities by SIC and NAIC

Ability to generate or export search data to a GIS

Benchmarking against other communities

Notification to you if a business does not update information

Ranked by "Top Box" response

Doesn't always add to 100% as "not stated" not shown

■ %very important ■ % 4 ■ % 3 ■ % 2 ■ %very unimportant



On-Line Services

Current Services Offered On-Line

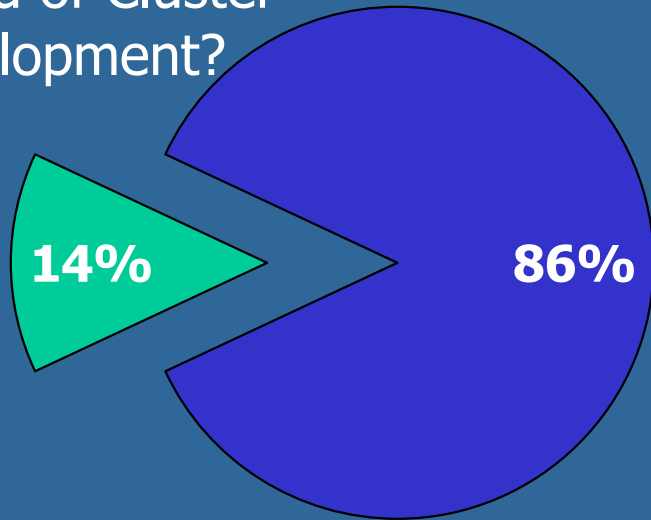


Less than half of business directory services offer the most important feature to EDOs - up to date information.

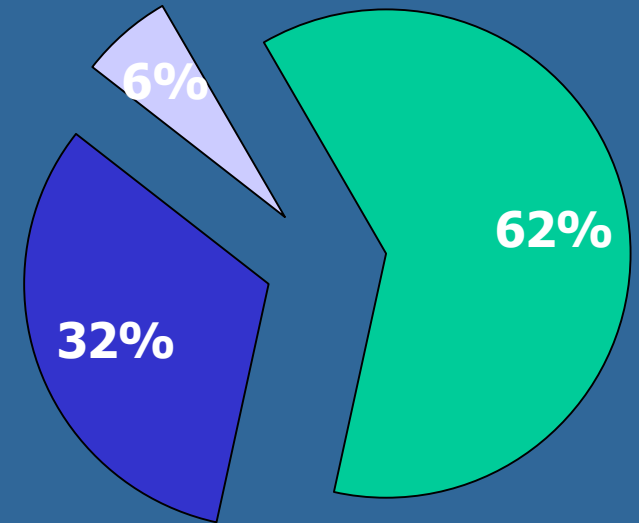
A local events calendar is the most common feature currently available on-line in communities.

Cluster Development

Heard of Cluster Development?

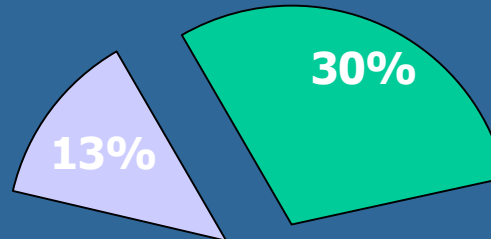


If yes
...

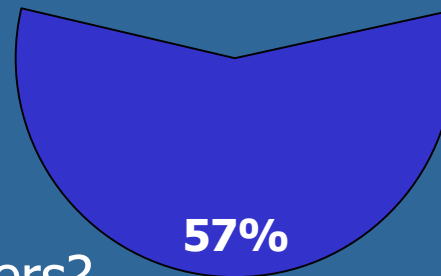


Currently Measuring Cluster Activity?

Awareness of Cluster Development is high. Among those aware, almost 2/3s are measuring, and just over half are organizing, cluster activity.



Your Region Organizing Clusters?



Summary

- ☞ **There is widespread agreement among Economic Development professionals throughout the US and Canada that maintaining an up to date, accessible business directory is important for regional development.**
- ☞ **However, most regions struggle to maintain a comprehensive and accurate directory, relying on out of date information and a budget of less than \$5,000 for updates. Only a minority have a directory at least 75% complete.**
- ☞ **Currently, three quarters of communities provide paper based business listings. This is changing though, with a third intending to switch to an on-line directory system within the next six months.**
- ☞ **Fulfilling the need for on-line directory systems has largely been up to “in house” programmers and local contractors. Existing applications utilized are partial solution sets such as database programs and contact management software.**
- ☞ **The five most important features of an on-line system are providing up to date information, statistical reports, a seamless link to the region’s website, search capabilities for products & services, and a local events calendar. Other than having a calendar function, less than half of those surveyed currently had any of the other top required features available.**
- ☞ **Cluster Development is emerging as an important regional activity. While the majority of communities are now measuring this activity, less than 2 in 10 make available the information on-line.**