



Town of Neepawa 2025 Triage BR+E Study

Final Report

July 2025

Disclaimer

This report was provided to inform and assist the Town of Neepawa with the 2025 Triage BR+E Survey.

Deloitte does not assume any responsibility or liability for losses incurred by any party because of the circulation, publication, reproduction, or use of this report contrary to its intended purpose. This report has been made only for the purpose stated and shall not be used for any other purpose. Neither this report (including references to it) nor any portions thereof (including without limitation the identity of Deloitte or any individuals signing or associated with this report, or the professional associations or organizations with which they are affiliated) shall be disseminated to third parties by any means or included in any document without the prior written consent and approval of Deloitte.

Our report and work product cannot be included, or referred to, in any public or investment document without the prior consent of Deloitte LLP. The analyses are provided as of July 9, 2025, and we disclaim any undertaking or obligation to advise any person of any change in any fact or matter affecting this analysis, which may come or be brought to our attention after the date hereof. Without limiting the foregoing, if there is any material change in any fact or matter affecting the analyses after the date hereof, we reserve the right to change, modify or withdraw the analysis.

Observations are made based on economic, industrial, competitive and general business conditions prevailing as at the date hereof. In the analyses, we may have made assumptions with respect to the industry performance, general business and economic conditions and other matters, many of which are beyond our control, including government and industry regulation. No opinion, counsel, or interpretation is intended in matters that require legal or other appropriate professional advice. It is assumed that such opinion, counsel, or interpretations have been, or will be, obtained from the appropriate professional sources. To the extent that there are legal issues relating to compliance with applicable laws, regulations and policies, we assume no responsibility, therefore. We believe that our analyses must be considered as a whole and that selecting portions of the analyses, or the factors considered by it, without considering all factors and analyses together, could create a misleading view of the issues related to the report. Amendment of any of the assumptions identified throughout this report could have a material impact on our analysis contained herein. Should any of the major assumptions not be accurate or should any of the information provided to us not be factual or correct, our analyses, as expressed in this report, could be significantly different.

Table of Contents

Background and Methodology	pg. 04
Business Community Firmographics	pg. 06
Business Performance	pg. 09
Net Promoter Score (NPS)	pg. 12
Key Performance Indicator (KPI) and Satisfaction Levels	pg. 14
Business Community Health Index	pg. 17
Future Plans	pg. 19
Triage Flags	pg. 21
Communication	pg. 23
Conclusions	pg. 25





Background and Methodology

Background and Methodology

The objectives of the Neepawa Economic Development 2025 Business Survey were to...



Engage the broader business community and identify potential expansion or retention opportunities



Gauge businesses' attitudes and perceptions around operating a business in the Town



Understand how to best support local businesses in the Town of Neepawa

Survey Methodology

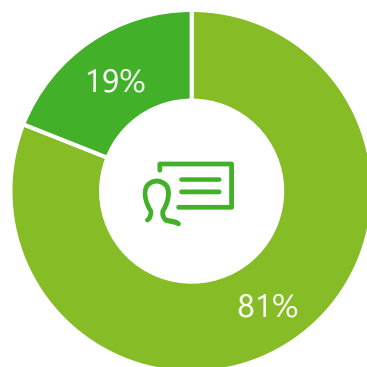
- A random sample telephone and email survey was conducted with 79 businesses. The total response rate for the survey was 20% which is very high in the market research industry (typical averages are in the 1-5% range).
- This scientific approach ensures that the results have a high level of accuracy (with a margin of error of +/- 10% at a 95% confidence level) and statistically represents the business community in the Neepawa.



Business Community Firmographics

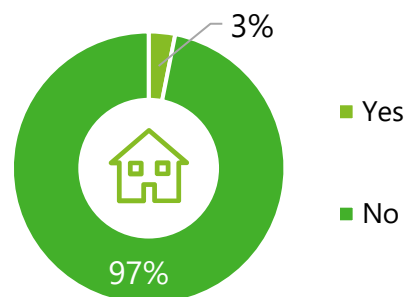
Business Community Firmographics (1/2)

Business ownership



- Locally Owned and Operated
- Externally Owned and Operated

Home-based business



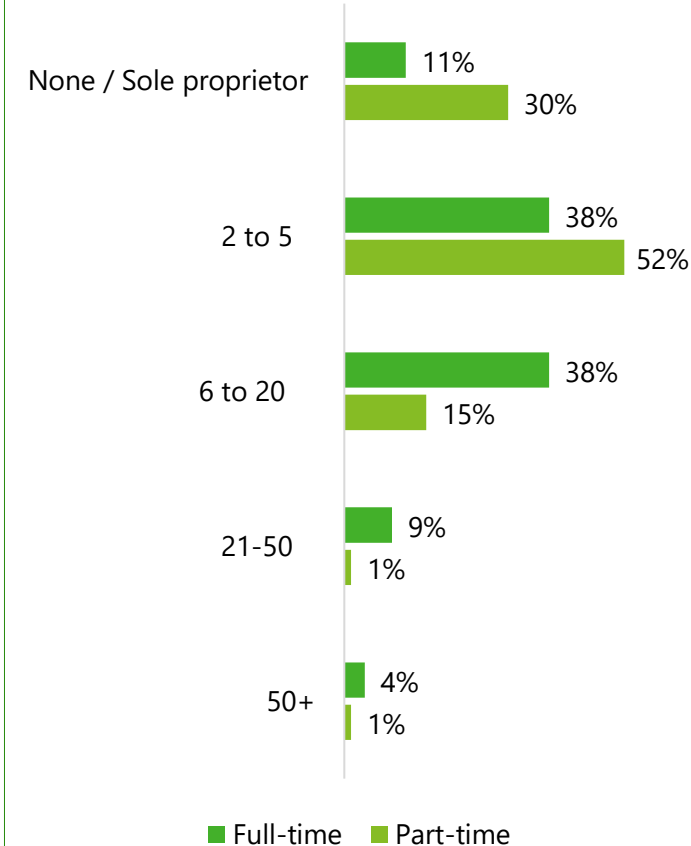
- Yes
- No

Home-based businesses who are registered with the province



- Yes
- No

Number of employees



- Full-time
- Part-time

Q: Which of the following best describes your business? (n=79)

Q: Is your business home-based? (n=64)

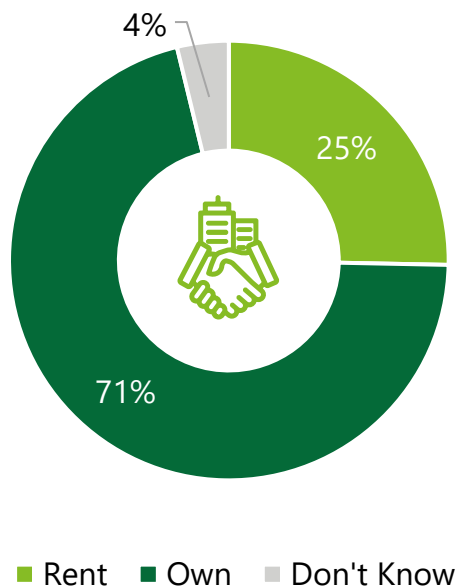
Q: Is your business registered with the province of Manitoba? (n=2)

Q: Including yourself, how many full-time employees currently work at this location? (n=79)

Q: How many part-time employees currently work at this location? (n=79)

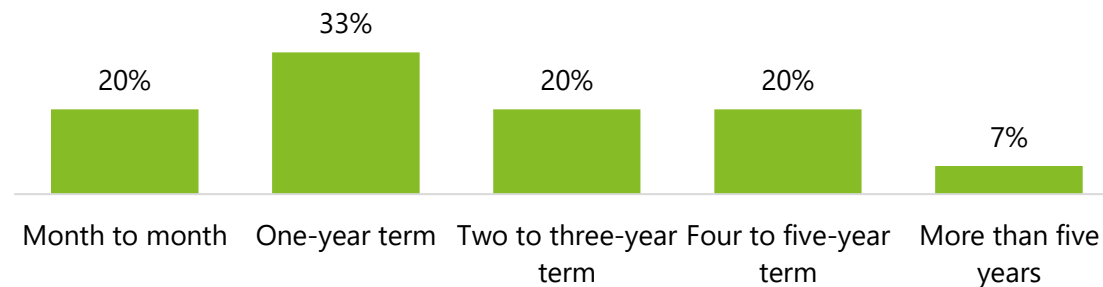
Business Community Firmographics (2/2)

Property ownership

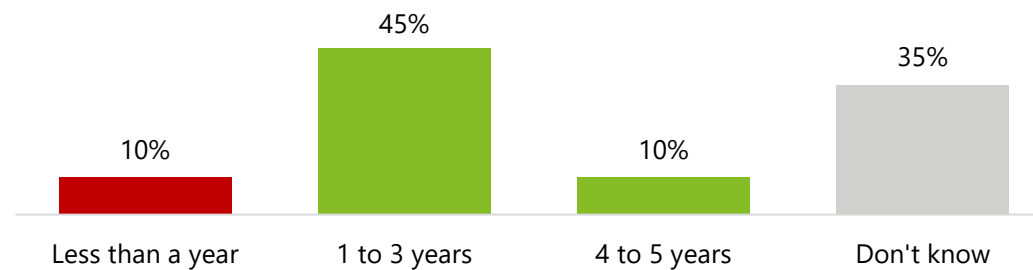


Businesses who rent their property

Term of lease



Lease expiry



Q: Do you currently rent or own your business property? (n=79)

Q: What is the term of the lease? Is it: (n=15)

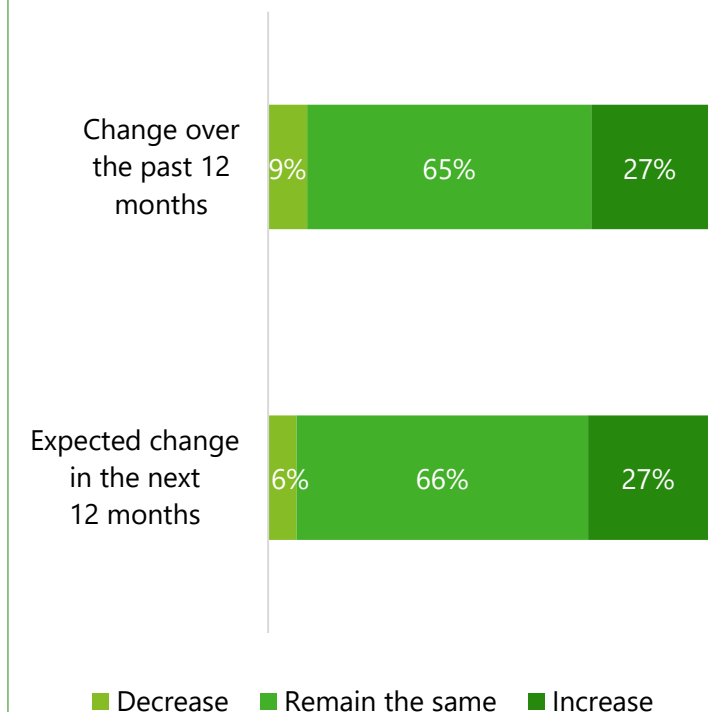
Q: And to the best of your knowledge when will your lease expire? (n=20)



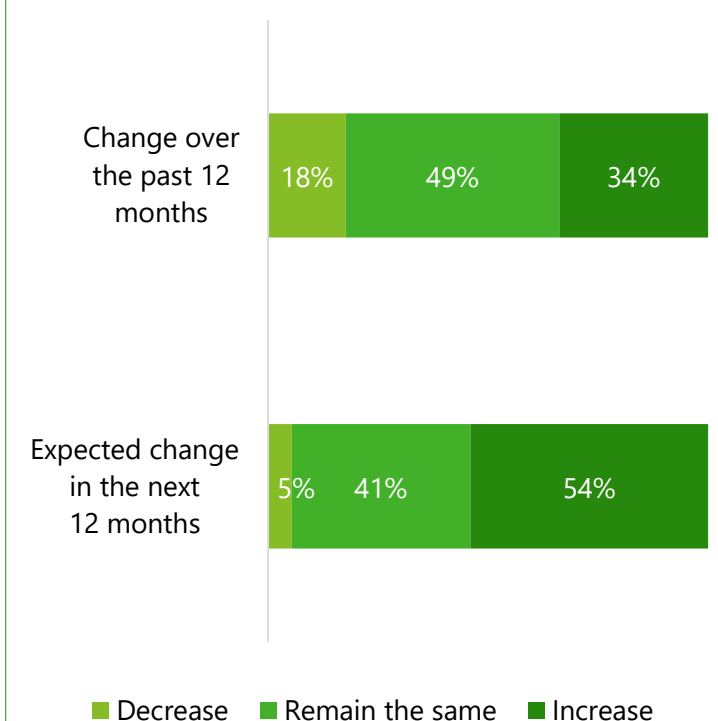
Business Performance

Business Performance (1/2)

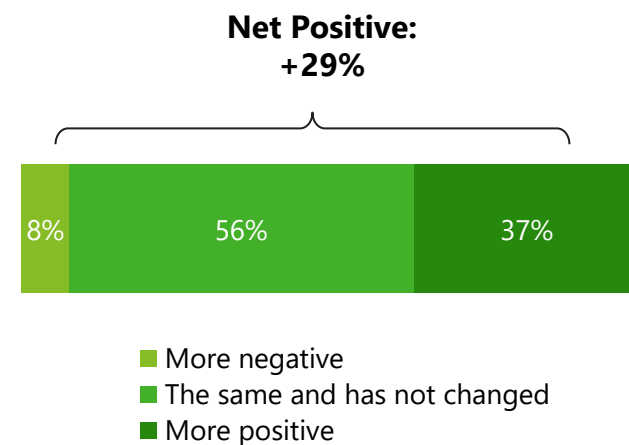
Change in number of employees



Change in revenue



Attitude about doing business in Neepawa over the past year



Q: Over the past 12 months did the total number of employees in your company: (n=79)

Q: Thinking about the next 12 months, do you expect the total number of employees in your company to: (n=77)

Q: Compared to the past 12 months, have the revenues at your business this fiscal year... (n=68)

Q: And what are your expectations for the next 12 months in total revenues compared to the last year? (n=74)

Q: Over the past 12 months would you say your attitude about doing business in Neepawa has become... (n=79)

Business Performance (2/2)

Business Performance Metric

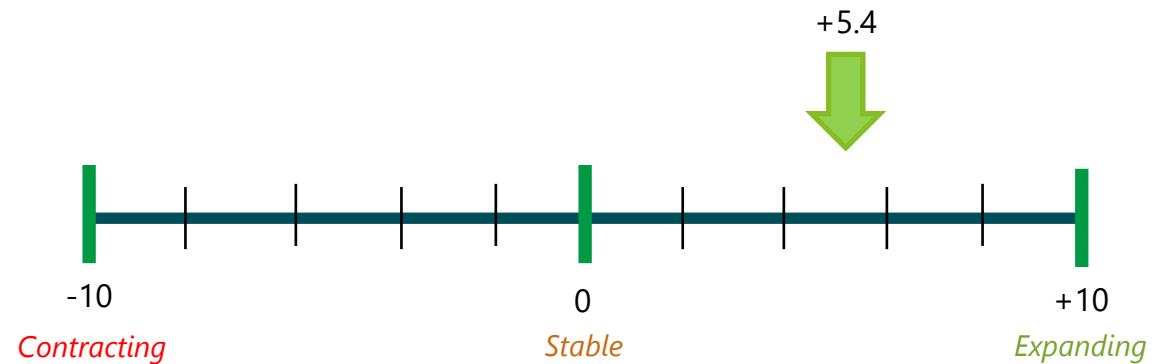
The Business Performance Forecast is a metric created by combining the five business performance questions:

-  Historical employment changes
-  Future employment expectations
-  Historical revenue changes
-  Future revenue expectations
-  Trends in business attitudes

This metric considers the changes in staff, revenue and attitudes among businesses in the Town for an overall directional picture of the business climate in the area.

Town of Neepawa BPF Score

The Town of Neepawa scored **+5.4** indicating an **overall increasing trend** in business performance.

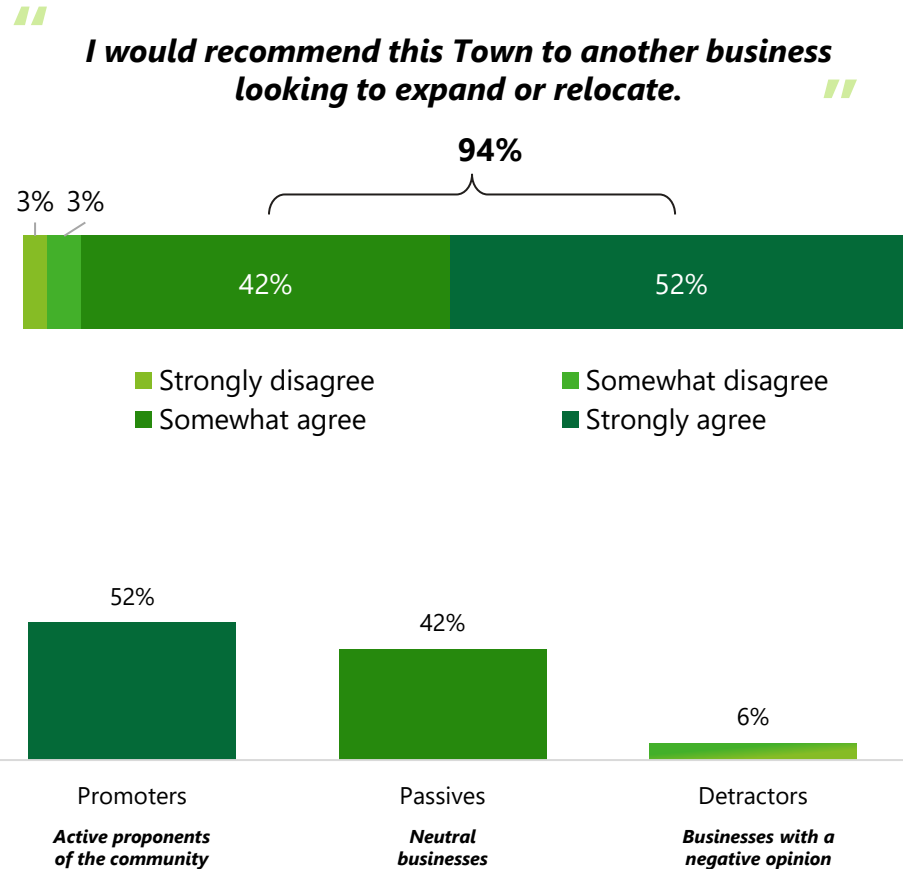




Net Promoter Score (NPS)

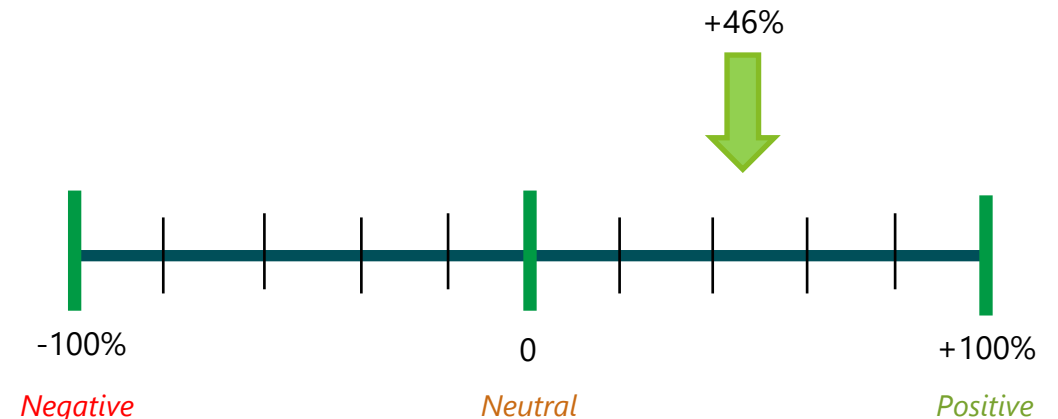
Net Promoter Score (NPS)

NPS Metric



Town of Neepawa NPS

The Net Promoter Score was **+46%** indicating **more positive proponents** of the community than negative.



$$NPS = Promoters - Detractors$$

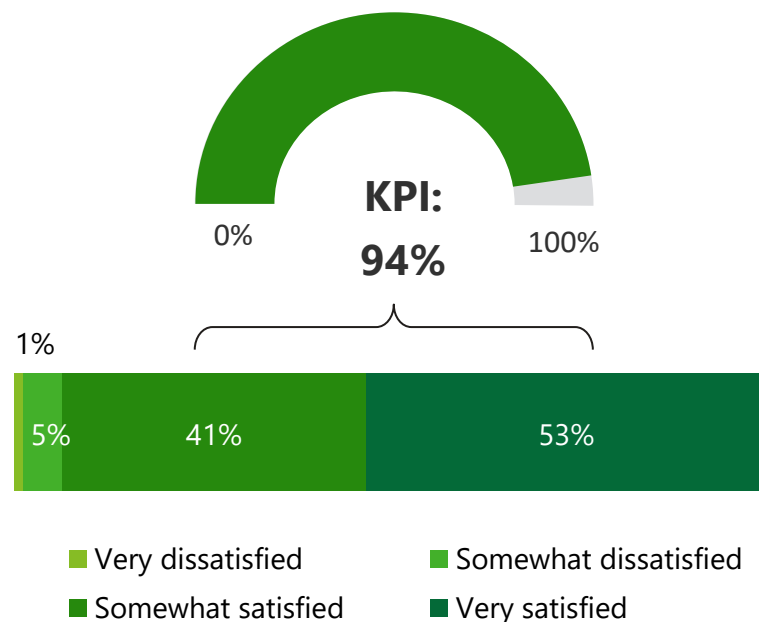
Q: Please rate the level to which you agree or disagree with the following statement: I would recommend this Town to another business looking to expand or relocate. (n=77)



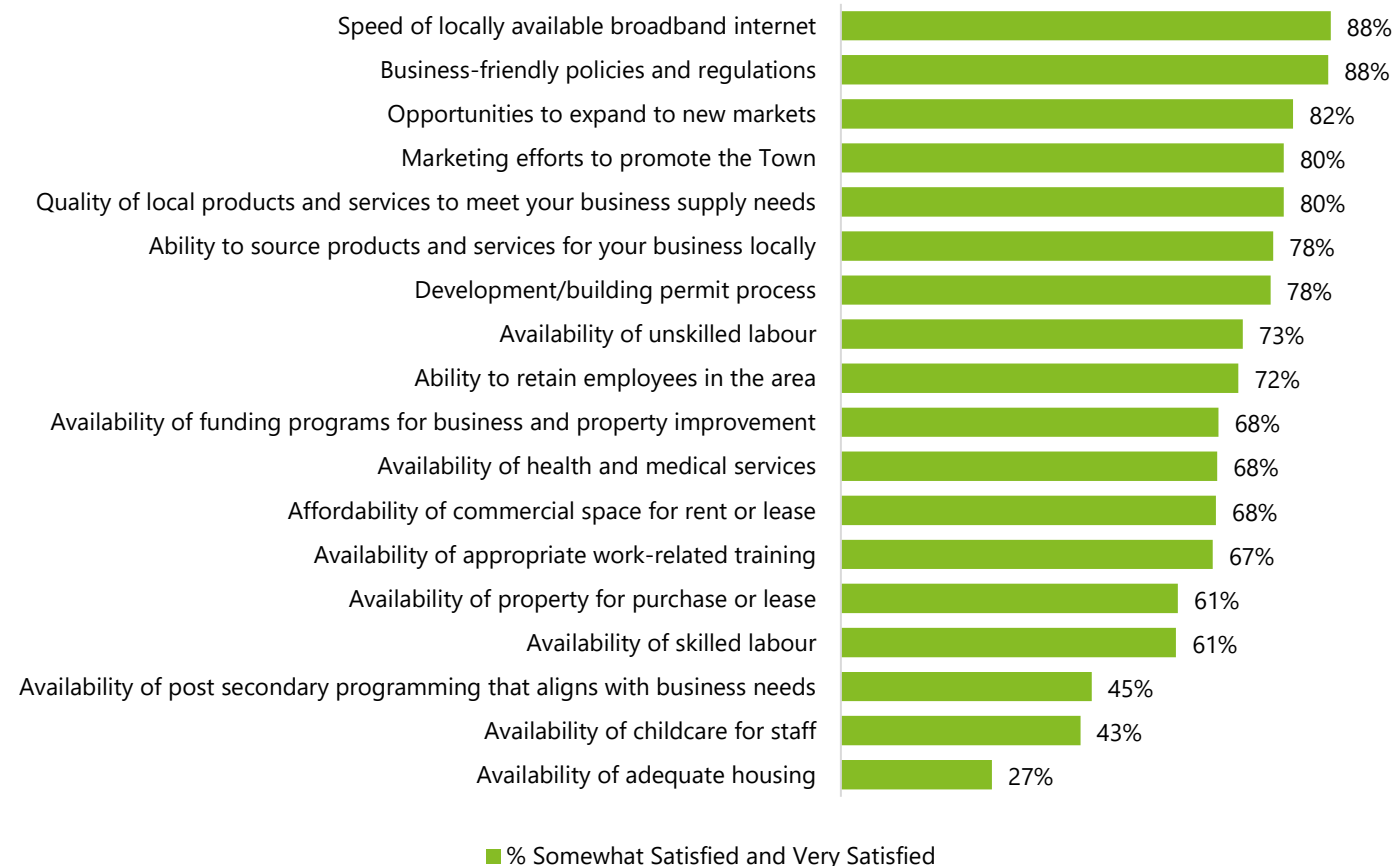
Key Performance Indicator (KPI) and Satisfaction Levels

Key Performance Indicator (KPI) and Satisfaction Levels (1/2)

Overall satisfaction with the Town



Satisfaction with various factors related to doing business in the Town



Q: Overall, how satisfied are you with the Town Neepawa as a place to own and operate a business? Would you say you are: (n=79)

Q: And now please tell me how satisfied you are with each of the following factors of doing business in the Town. (n=79)

Key Performance Indicator (KPI) and Satisfaction Levels (2/2)

Derived Importance Methodology

Priority Matrix: Using respondents' satisfaction levels with various factors related to doing business in Neepawa, a priority matrix was created using Deloitte's proprietary derived importance methodology. The Priority Matrix consists of three metrics:

- **Level of Importance:** A statistical measure using a machine learning algorithm to determine the strength of the relationship between the factors and respondents' overall satisfaction with Neepawa as a place to own and operate their business. Attributes with a high importance tend to matter greatly to businesses.
- **Performance:** The percentage of respondents who were somewhat or very satisfied with a given factor.
- **Priority rank:** This was determined for each attribute based on high levels of importance and low levels of performance. Top priorities are factors where there is opportunity for improvement, and any improvements made would be likely to have a big impact on their overall satisfaction with Neepawa as a place to own and operate a business.

Priority Matrix

Factor	Performance	Importance	Priority Rank
Availability of adequate housing	27%	5.7	1
Availability of childcare for staff	43%	6.1	2
Availability of post secondary programming that aligns with business needs	45%	5.9	3
Availability of health and medical services	68%	7.9	4
Availability of property for purchase or lease	61%	6.1	5
Availability of skilled labour	61%	5.9	6
Availability of appropriate work-related training	67%	7	7
Availability of funding programs for business and property improvement	68%	6.8	8
Ability to source products and services for your business locally	78%	9.4	9
Affordability of commercial space for rent or lease	68%	5.9	10
Ability to retain employees in the area	72%	5.9	11
Marketing efforts to promote the Town	80%	8.1	12
Availability of unskilled labour	73%	5.5	13
Development/building permit process	78%	5.9	14
Quality of local products and services to meet your business supply needs	80%	6.6	15
Opportunities to expand to new markets	82%	5.5	16
Business-friendly policies and regulations	88%	7.9	17
Speed of locally available broadband internet	88%	5.9	18

Key Insights

Using Deloitte's proprietary derived importance methodology, it was found that the top priorities for businesses were the availability of adequate housing, availability of childcare for staff, and the availability of post secondary programming that aligns with business needs.

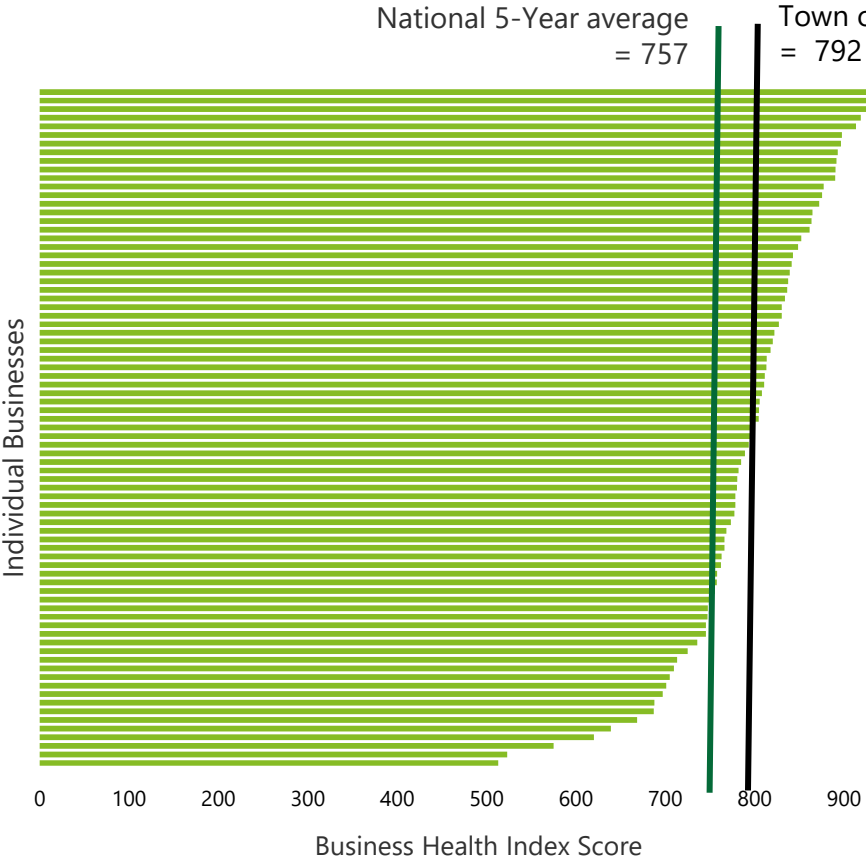


Business Community Health Index

Business Community Health Index

Business Community Health Index

Using the results of this business survey, Deloitte combines the questions into a proprietary Business Community Health Index which is the combination of the following nine sub-scores:



Neepawa scored very well on the Business Community Health Index. This index is based on several factors:

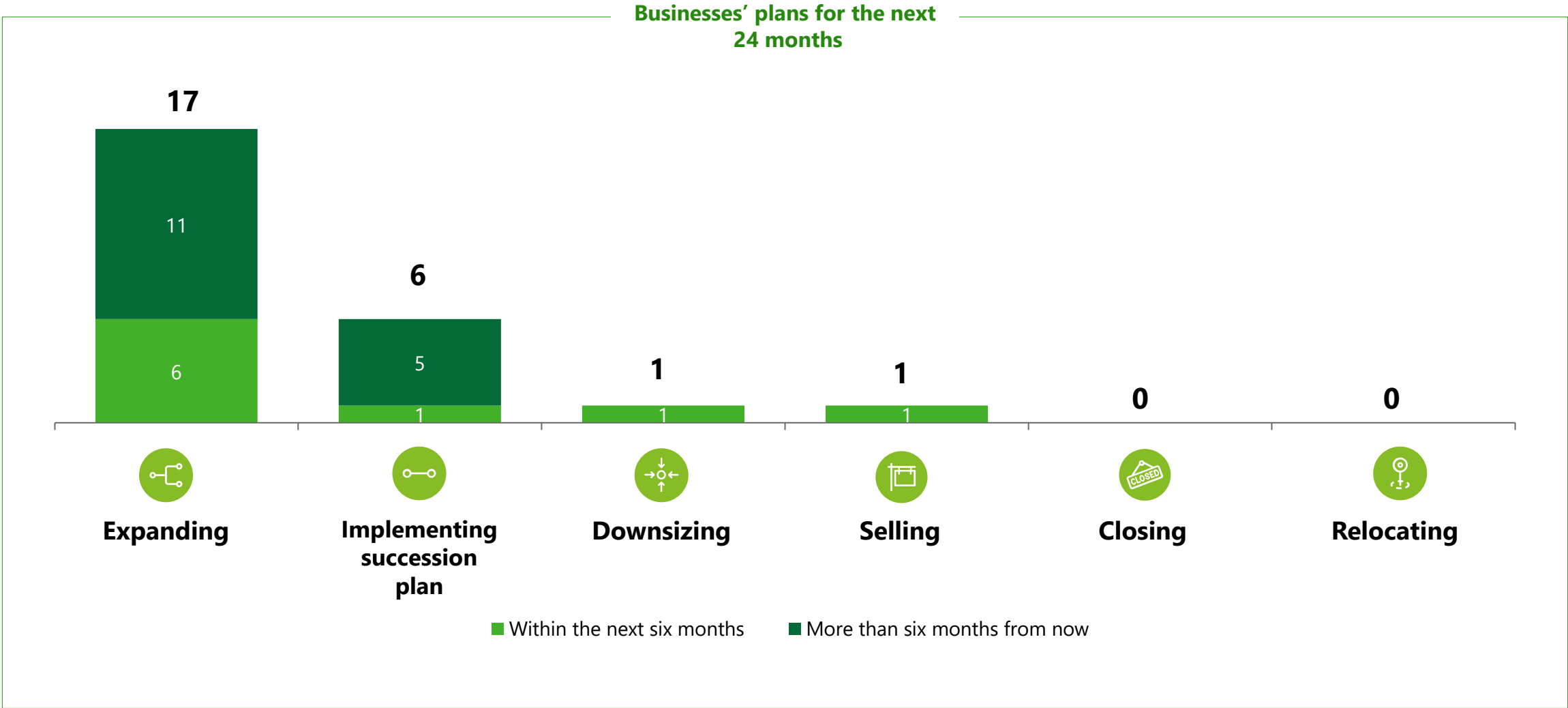
The Town outperformed the provincial average with regards to businesses' changes in attitudes, community recommendation, and on factors related to Business Supports, Policies & Incentives.

The Town did not score lower than the national average on any sub-score of the BCHI but scored similar to the average on Workforce Attraction and Retention, and historical changes in revenues.



Future Plans

Future Plans



Q: Within the next 24 months, do you plan on: (n=79)



Triage Flags

Triage Flags

Triage Flags

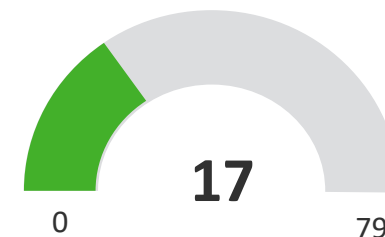
Throughout the survey process Triage cases that represented green or red flags were tracked.

Out of the 79 businesses surveyed, 27 businesses presented an opportunity for intervention.



Green Flags:

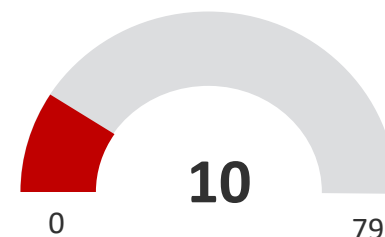
Respondents who are considering expanding their business in the next 24 months.



Red Flags:

Respondents who are considering relocating, downsizing, selling, or closing.

Businesses whose lease expires in less than a year.



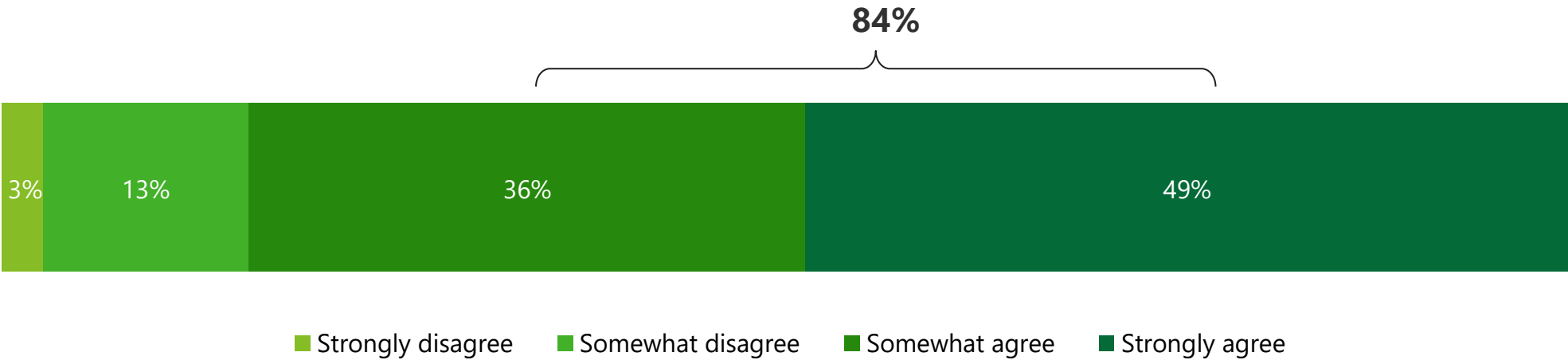


Communication

Communications

Business Community Contact

// *I know who to reach out to at the Town if I'm looking for support growing my business or navigating other business concerns.* //



Q: Please rate the extent to which you agree or disagree with the following statement: I know who to reach out to at the Town if I'm looking for support growing my business or navigating other business concerns. (n=79)



Conclusions

Conclusions



Business Community Satisfaction

Businesses operating within of Neepawa are highly content with the area as a place to conduct their operations, with an 94% satisfaction rate.

Businesses were especially satisfied with speed of locally available broadband internet (88%), business friendly policies and regulations (88%). And opportunities to expand to new markets (82%).

High scores in these metrics have a strong impact on the overall satisfaction scores of the local business community and are excellent indicators of a healthy community economy.



Top Priorities for the Business Community

Using Deloitte's proprietary derived importance methodology, it was found that the top priority factors for the business community include:

1. Availability of adequate housing
2. Availability of childcare for staff
3. Availability of post secondary programming that aligns with business needs.



Overall Business Community Recommendations

At the business community-level, Deloitte recommends that the Town examine the top items in the Priority Matrix and assesses where improvements can be made.

If the Town is able to make improvements in these areas for the business community, this would be expected to improve overall satisfaction looking forward.



Individual Business-Level Recommendations

At the individual business-level, Deloitte recommends following up with the businesses who have opted to share their individual responses, to connect and offer any supports available that may benefit them. Some items that are well-suited to prioritize which businesses to follow-up with include:

1. Green or red triage flags
2. High or low Business Community Health Index scores
3. Businesses who are unsure who to reach out to with business concerns in Neepawa



About Deloitte LLP

Deloitte is the brand under which tens of thousands of dedicated professionals in independent firms throughout the world collaborate to provide economic development expertise, strategic planning, market research, audit, consulting, financial advisory, risk management and tax services to clients. We have more than 225,000 professionals in 47 member firms in 150 countries. It has operated since 1845. Deloitte LLP is the Canadian member firm of this global network and has several offices across Canada, including Toronto, Vaughan, Burlington, Ottawa, Calgary, Edmonton, Halifax, Montreal, and Vancouver.

Deloitte's Market Research Capabilities


In 2017, we started a Market Research and Analytics Division. The division is focused on gathering local market intelligence. The statistically reliable data from businesses, consumers, and citizens is gathered and analyzed with methods that ensure applicability to strategy and action planning. Bringing these capabilities in-house has positioned us to better integrate the latest market research innovations into our work, and to provide the most diverse array of market intelligence supports for our clients.

Contact

Chris Bandak

Economic Advisory, Managing Director

 cbandak@deloitte.ca

 +1 (416) 607-6747

Simon Webb

Economic Advisory, Manager


 swebb@deloitte.ca

 +1 (613) 299-3776

Ivana Bjelakovic

Economic Advisory, Consultant

 ibjelakovic@deloitte.ca

 +1 (647) 532 4407