

Local Business Owners Survey

Report of Results

August 8, 2018



Executive Summary

The City of Sisters conducted its second local business owner survey between the months of May and July in 2018. The survey was included with all of the business license renewal applications and therefore all businesses, whether in the city or not, were given the opportunity to have input on a series of questions regarding city services.

A total of 530 surveys were mailed in the third week of May. There were 358 in-city businesses and 172 out-of-city businesses included in the mailing. Return rates at the end of July stood at 147 completed surveys of which 120 were in-city businesses and 27 out-of-city businesses. Percentage wise the total response rate was 27.7% (in-city 33.5% and out-of-city 15.7%).

Using a 95% confidence interval the margin-of-error for the survey is approximately six percent (6%). In other words we can be confident that the survey responses accurately reflect the opinion of the entire population (local business owners) 95% of the time with a margin of error of plus or minus six percent (6%) around each data point.

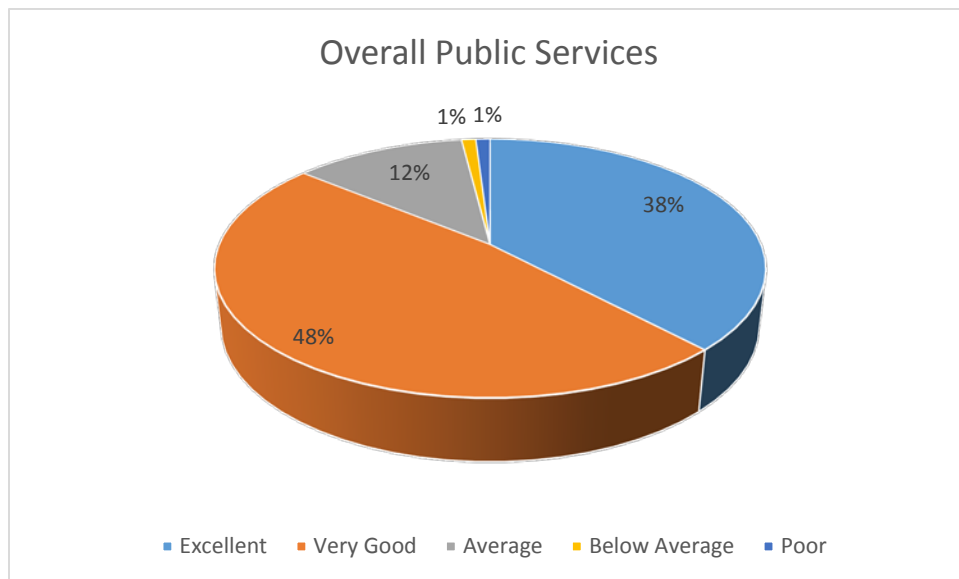
Although I had hoped for a slightly higher return rate, it should be noted that over one-third of in-city businesses responded to the survey which is an above-average response rate to a mailed survey. The following sections contain the highlights of the results of the survey as well as various appendices with summaries of written responses.

Results

Public Services and Infrastructure

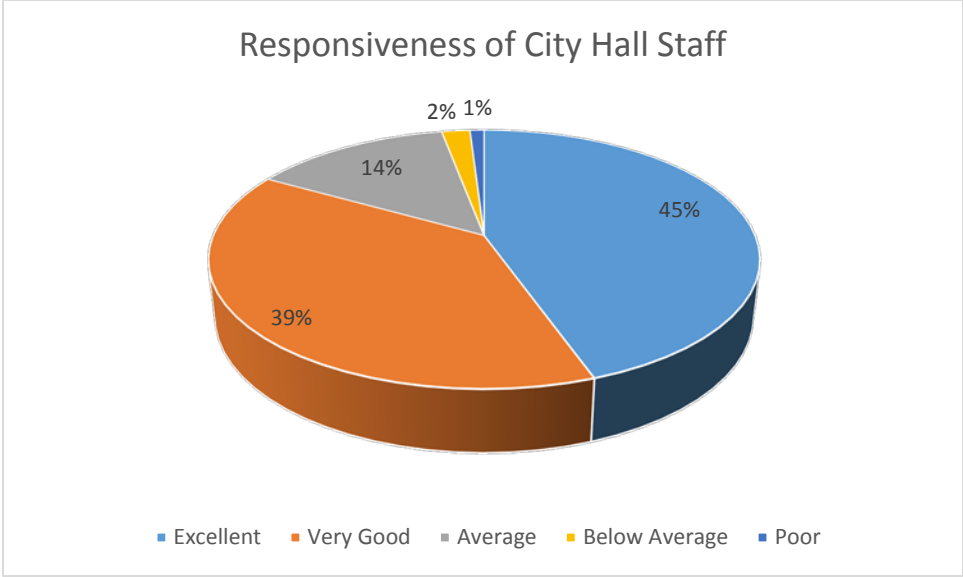
The survey asked seven questions regarding public services and infrastructure that most likely impact business owners. Generally speaking the city performed well in almost all most areas. The results indicate that our downtown is a very desirable place to open a business and that the streetscape and parks are most highly regarded.

Respondents were very satisfied with overall public services provided by the City. 86% rated services as excellent or very good.



Among specific services, streetscape amenities in the downtown, and maintenance of streets and parks ranked the highest with 95% and 93% excellent or very good ratings respectively. The lowest rated areas were available parking in the downtown and city information kiosks showing businesses and services. A total of 44% and 51% rated these services as excellent or very good.

Finally, the responsiveness of city staff was also rated very highly, with 84% saying staff is either excellent or very good. How businesses view City Hall is critical from a customer service standpoint and I believe staff should be commended for the overwhelmingly positive feedback.



Affordable Housing

As we know, housing affordability is a problem that faces almost all communities in Oregon and Sisters is no different. Specific to the business survey we asked if housing affordability affected the ability to hire and retain employees. Of the respondents, 42% stated that it did have an impact, while 58% stated that it did not. Obviously this data illustrates that housing affordability is not a concern for the majority of businesses surveyed, however the fact that over 40% of our businesses are negatively impacted by housing should give one pause. The City should continue to look for ways to address affordable housing through a program of robust public and private solutions.

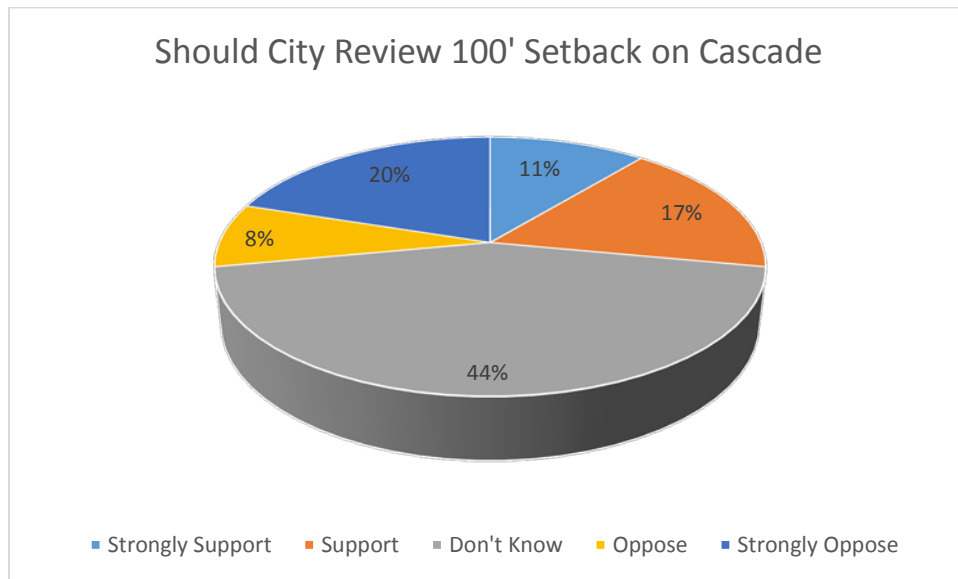
Plastic Bag Ban

This question was included as a follow up to a presentation by a group of high school students concerned with the impacts of plastic on our environment. Although many businesses in Sisters already do not offer plastic bags, likewise many do. A variety of concerns ranging from cost, convenience and consumer preference were discussed as a part of any proposal to ban plastic bags. That being said, more and more studies prove that plastics are having a very negative impact on our planet, wildlife and humans.

Based on the results of the survey, there is clear support among business owners to ban plastic bags with 60% either strongly supporting or supporting a ban on the use of this type of bag. On the other side, 21% strongly oppose or oppose any ban. 18% responded they neither support nor oppose such a ban.

Transient Merchants on Cascade

As you know, per municipal code, chapter 5.35.020.03 transient merchants are not allowed within 100' of Cascade Avenue. The question of whether to review the ordinance or not, perhaps more than any other, shows the most diversity in responses. As you can see from the chart below an equal number of respondents support and oppose reviewing the setback requirement. Even more interesting is the fact that a plurality of respondents don't seem to be concerned either way. It is important to note that our survey does not distinguish whether a respondent's business is on Cascade or not. Because these businesses would be the most impacted by any changes it is probably important to individually poll them before considering any modifications in the ordinance.



Business Development and Job Creation

As we know, economic development is one of the greatest challenges facing small towns. As we struggle to attract businesses that pay livable wages and bring families into our communities it is critical to understand whether businesses feel the city is doing its part to support economic development. The results of the survey indicate that the vast majority of the respondents believe that the city is appropriately focused on new business development and job creation. 76% of the surveys indicated that we are doing enough while only 24% indicated we should be doing more. An important caveat to point out is that almost half of the survey respondents did not answer this question or indicated that they did not know how to answer the question. This fact probably illustrates that many businesses simply do not know what work is being done with economic development and that the city, Chamber of Commerce and EDCO might want to collaboratively educate business owners on our economic development program.

Conclusion

The Local Business Survey results indicate that businesses are generally very satisfied with the services they receive from the city. Although parking in the downtown is perceived as more problematic than other areas, it should be pointed out that this is consistent with the results of most downtown areas throughout the country. The city may want to consider doing a parking study in the future to determine whether or not there is indeed a problem.

There seems to be solid support for banning plastic bags in the City while reaction is mixed to making changes to the transient merchant setback on Cascade. Additionally the survey revealed that there is little support for the city to take over snow removal in public parking lots and sidewalks in the downtown.

Finally, a vast majority of the businesses believe the City is properly focused on economic development, however more should be done to make businesses aware of the programs available to them.

The following pages include appendices containing the survey instrument with results, a summary of written comments and the specific comments by survey ID. I think you will find all of them enlightening.

Appendix A – Survey Instrument



Survey of Local Business Owners

The City of Sisters is interested in the opinions of local business owners such as yourself. Your feedback will help the City maintain a welcoming environment for local businesses. Your responses will be kept anonymous and used only for internal planning purposes.

The City would like to know your opinion about public services and infrastructure.

	Excellent	Very Good	Average	Below Average	Poor
1. Overall, how would you rate the public services provided by the City of Sisters	38%	48%	12%	1%	1%
2. Available parking in the downtown area	14%	30%	40%	13%	3%
3. City information kiosks showing businesses and services	13%	38%	41%	5%	2%
4. The City of Sisters' website	20%	46%	32%	2%	0%
5. Streetscape amenities (sidewalks, planters, etc.) in downtown	53%	42%	5%	0%	0%
6. Maintenance of streets and parks	52%	41%	6%	0%	1%
7. Responsiveness of City Hall staff	45%	39%	14%	2%	1%

8. Does the availability of affordable housing affect your ability to hire and retain employees?
 42% Yes
 58% No

If you answered yes, please explain the circumstance: _____

9. Would you support a prohibition on plastic bags used by retailers?
 37% Strongly Support
 23% Support
 18% Don't Know
 14% Oppose
 8% Strongly Oppose

If you are opposed to a plastic bag prohibition, what other options to limit plastic waste would you recommend? _____



Survey of Local Business Owners

10. The City has received requests to review the requirements for a 100' setback off of Cascade Avenue for transient merchants (municipal code, chapter 5.35.020.03). Would you support eliminating or modifying this requirement?

- 11% Strongly Support
 - 17% Support
 - 44% Don't Know
 - 8% Oppose
 - 20% Strongly Oppose
- Comments: _____

11. Would you support a fee to cover the cost of snow removal in the downtown for public parking lots and sidewalks if the City contracted for the service?

- 9% Strongly Support
 - 27% Support
 - 24% Don't Know
 - 23% Oppose
 - 16% Strongly Oppose
- Comments: _____

12. In your opinion, what type of events would generate increased foot traffic at your business during the winter months?

13. Would you be interested in learning about hosting an intern through a locally managed internship program that could be beneficial to your business while providing meaningful work experiences to high school and college-aged students?

- 17% Very Interested
- 20% Somewhat Interested
- 14% Don't Know
- 49% Not Interested

If you would like more information please contact:
Caprielle Foote-Lewis at 541-977-5683 or
Caprielle@edcoinfo.com

14. Do you believe the City is appropriately focused on new business development and job creation to insure long-term fiscal stability and increase student enrollment?

- 76% Yes
- 24% No

Are there any other concerns you would like to include that have not been covered?

Appendix B – Summary of Written Responses

Question #8 – Affordable Housing

39 responses Nothing available to rent or buy in Sisters. Employees have to commute.

Question #9 – Prohibit Plastic bags

44 responses

13 ban plastic use paper or cloth

9 recycle plastic

10 Educate/Incentives instead of Prohibiting Plastic

4 Use biodegradable plastic

8 Do not prohibit

Question #10 – 100' setback on Cascade for Transient Vendors

25 responses

13 Would like no Transient Vendors.

3 allow on case by case basis

5 allow anywhere on Cascade.

2 modify footage

2 keep as is

Question #11 – Snow plowing contract

27 responses

6 City should cover cost in budget

7 Business owners should take care of Removal

14 depends on cost and coverage.

Question #12 – What types of events to bring business in Winter

41 responses

10 winter sports events

- 12 Winterfest including music/arts/food
- 9 Holiday lights/sledding/carriage rides
- 4 Teaming with Hoodoo for events
- 6 City Wide/Business to Business events

Question #14 – Other Concerns

35 responses

Concerns all over the board, Affordable housing, affordable rent, noise, traffic.

Appendix C – Written Responses by ID#

CITY OF SISTERS
SURVEY OF LOCAL BUSINESS OWNERS

Written Comments

ID #	QUESTION #	COMMENTS
1A	N/A	N/A
2A	N/A	N/A
3A	N/A	N/A
4A	8	Affordable housing would help hiring and retaining employees. Concerned with undesirable element that may come with affordable housing.
4A	10	Strongly opposes. Does not want Sisters to look like "China Town".
4A	11	Would like to keep the work with the City Employees.
4A	14	Stop the growth! Long term residents and tourists do not want to see Sisters change. Get the transients out of Sisters!
5A	9	Vacation rental guests could donate their unused non-perishable food items to a local charity.
6A	10	Case by case basis.
7A	8	Workers in Sisters have to travel too far from Redmond or Bend.
7A	9	Supports all recycling efforts.
7A	10	Not fair to merchants paying monthly rent.
8A	9	Should not have to be a City mandate. Should be a business/sustainability question.

9A	10	The City should not allow transient activity of any kind.
9A	11	The fee should be covered in the City's budget.
10A	9	Businesses could have signage to encourage customers use re-usable bags.
11A	N/A	N/A
12A	N/A	N/A
13A	N/A	N/A
14A	N/A	N/A
15A	8	It is extremely difficult finding employees right now.
15A	11	It would depend on the amount of the fee.
15A	12	Do whatever Levenworth, WA is doing.
16A	9	Loves plastic bags.
17A	N/A	N/A
18A	N/A	N/A
19A	11	This fee should already be paid by the City.
19A	12	Have Snow Sport events
19A	14	Strongly oppose bringing retail marijuana to Sisters.
20A	N/A	N/A
21A	11	Fee should apply to town located businesses.
21A	14	More needs to be done to improve the look of surrounding neighborhoods instead of just downtown and parks.
22A	8	It is hard for people who work in Sisters to also live here.
22A	11	Business without "Store-Front" would not benefit from this fee.

23A	N/A	N/A
24A	9	Don't believe it is a problem
24A	14	Affordable housing is not going to solve this problem. Living wage job creation and industry in any form will.
25A	N/A	N/A
26A	8	Rent prices are too high here for out of town businesses to stay and work.
26A	9	Encourage business to offer reusable bags. Use City of Sisters Logo on bags to encourage local shopping.
27A	14	Moderate growth and tighten up building codes.
1	8	Need more low income housing.
1	14	Allow summer outdoor music until 11:00pm
2	9	Use paper bags
3	9	In business recycling program
4	N/A	N/A
5	8	Many employees cannot live locally and have to commute long distances to work.
5	12	Food, Beverage and/or music events.
6	8	If not for Habitat for Humanity, some employees would not even be working here.
6	9	Should also ban plastic water bottles and plastic straws.
6	10	The 100' rule does not make sense.
6	11	Should be done by the City without any extra fees.
6	12	A community ice skating rink. Winter carnival w/ice sculptures.
7	12	Off road festival, Winter Carnival, Hot Air Balloons

8	9	Leave as is.
8	14	Require more parking on site.
9	9	Biodegradable plastic bags.
9	10	Supports Transient Merchants.
10	N/A	N/A
11	14	Concerned about recent changes to short term rental rules.
12	9	City should manufacture paper bags for local businesses to buy at bulk with marketing logos.
12	10	WAIVE THE RULE FOR VETS ON SPECIFIC DAYS ONLY.
12	14	Have the City take over the Law Enforcement from the County.
13	9	Also eliminate all shrink wrap, ties, etc. as well.
13	10	Let them within 100'
13	11	Let the business owners pay.
13	12	Winter festival (Winter art/taste of Sisters/ice sculptures.
14	9	Urge HCD to offer curb-side recycling in the greater Sisters area.
14	10	Put a limit cap on number allowed any given day.
15	9	Encourage business to use alternatives.
15	10	Infringes upon brick and mortar businesses.
15	12	Sports tournaments
16	N/A	N/A
17	10	Transient Merchants negatively impact business. Should not be allowed.

17	14	Need to attract more large business. Too many Restaurants.
18	12	Art shows, Indoor music festivals, Hoodoo coordinated activities.
18	14	Traffic at Locust and Hwy 20 is hazardous. Need a roundabout there.
19	N/A	N/A
20	N/A	N/A
21	12	Concerts, Film Festivals, Sporting Events.
21	14	Concerned about all the empty buildings in the Downtown core. Also concerned about how poor the housing looks throughout the City.
22	9	Supply low cost reusable bags. Use signage to encourage people to bring their own bags.
23	N/A	N/A
24	N/A	N/A
25	N/A	N/A
26	8	Have lost employees due to lack of housing close by and having to commute.
26	9	Add straws, soda cups, fast food meal containers, Styrofoam to the prohibition.
26	12	Do the tree lighting and Christmas parade closer to Christmas
26	14	Concerned about sidewalk repair in front of business.
27	8	Have to pay employees more per hour to offset travel expense/time because they can't afford to live here.
27	12	Winter events like Winter Fest.

28	8	Employees in lower wage brackets have difficulty finding affordable housing close to work.
29	8	As a non-profit, very difficult finding candidates willing to commute from Bend or Redmond.
30	8	Have had 5 employees quit and 4 could not accept position due to no affordable rent in the past 8 years.
31	9	Plastic bag bans OK for Grocery Stores but not retail shops.
31	10	Unfair for Transient Vendors to have same visibility as the Brick and Mortar establishments.
31	12	Weekend Tournaments.
32	N/A	N/A
33	14	Concerned that the City is only monitoring the Down Town area and not the Industrial Area.
34	8	Very difficult to find local help for part time hours.
34	9	Imposing a restriction would be a dis-service to the customers and businesses we are trying to get.
34	11	Already currently paying for removal.
34	12	Downtown sleigh or horse carriage rides. Snow mobile events. Ski shuttle or sledding parties with Hoodoo.
34	14	More retail businesses downtown need to stay open later during the summer.
35	8	With affordable housing, more restaurant employees would be able to live in the City.
35	9	Use paper bags.
36	8	Affordable housing allows for more affordable employees.
36	12	Fat Bike Racing

36	14	We need a stop sign on corner of Hood and Pine.
37	9	Recycle
37	12	Winter Carnival
38	N/A	N/A
39	8	People cannot find housing and therefore don't consider relocating here.
40	8	Housing costs are beyond reach of minimum wage employees.
40	9	Recommend eliminating single use plastics.
40	11	One snow removal source would eliminate a lot of problems.
40	12	Winter Carnival, Beer/Wine/Spirit Festivals, sleigh rides over the holidays.
40	14	Would like to install 'No RV Parking' signs along Cascade Ave.
41	N/A	N/A
42	11	Should be taken care of by individual business owners.
42	12	Winter Festival, Literary events
42	14	City of Sisters is a model for small municipality governance.
43	9	Do not want to limit plastic bags
44	N/A	N/A
45	N/A	N/A
46	8	People do not want to commute from Redmond. Limited workforce in Sisters, Huge issue
46	9	Need more plastic bag recycle locations.
46	10	The code is fair now.

46	11	Depends on the fee amount.
46	14	Concerned the City is selective on which policies it enforces.
47	N/A	N/A
48	N/A	N/A
49	12	Evening Art Walk Events
50	14	Too many Air Bnb's being built
51	9	Use paper, reusable bags.
51	11	Wants to make sure that any snow removal does not pile it up in front of businesses.
52	8	More affordable housing would make it easier to hire qualified staff.
53	9	Recycling education
53	12	Not needed.
54	11	Everyone needs to do their own.
55	N/A	N/A
56	8	Employees do not want to drive from Bend or Redmond but cannot find housing here.
56	12	Old west weekends, horse drawn wagons or carriage rides, historical tours.
57	N/A	N/A
58	N/A	N/A
59	12	Activities at 5 Pine and SAC
60	12	Sports tournaments
61	11	The City should be paying for this service.
62	8	About half of my employees live in Bend or Redmond. It is a problem

62	9	If a business uses them, they should have a receipt to recycle them.
62	11	Prefer to manage it myself.
62	12	Some sort of Winterfest.
63	9	No water bottles
63	10	There should be no outside vendors of any kind.
63	11	Don't want to be charged if I don't get the service.
63	12	Open the Three Creeks Road. Free Hoodoo Lift tickets if staying in Sisters. Bonfire at Fir Street park every weekend.
63	14	Too much focus on Cascade Ave. Traffic is becoming a real problem.
64	8	Some employees live out of town. One employee quit because of the commute.
64	12	Early morning snow removal
65	14	Affordable housing. It should be the City's responsibility to finance and install continuous sidewalks.
66	8	Have employees living in Bend. Employees renting a "room" in someone's home. 20 to 30 people on waiting lists for apartments.
67	9	Provide cloth bags
67	12	Music Fests in Winter. Open houses for more music and craft foods.
67	14	Concerned about affordable business leases and rents.
68	N/A	N/A
69	8	Often must hire from outside of Central Oregon, moving here is quite challenging due to lack of availability.

69	10	Local merchants deserve the exposure from Cascade not transient merchants.
69	11	Provided liability for potential injury is part of this proposal.
69	12	A festival of lights, bonfires w/hot drinks music.
70	9	Limit straws and plastic packaging as well.
70	12	Events at 5Pine, arts and crafts shows, Arctic plunge at Suttle Lake, Cookie Cutter Collectors Club convention.
70	14	Need More investment advertising Hoodoo as a destination.
71	8	On service workers pay it is not possible to afford Sisters.
71	9	Education before restrictions.
71	10	A lot of money was spent improving Cascade Ave. Do not block it with Transient Vendors.
71	11	We are so over "fee'd" already.
71	12	Any event that is centered in Town where people go from venue to venue.
71	14	Concerned over the issue of dispensaries and being allowed on Cascade Ave.
72	12	Outdoor gear and ski swap. 10K run, Mt. bike events.
73	10	Transient merchants on Cascade detract from the businesses there. They have a negative impact on visitor traffic.
73	12	More business to business events. Snow related events.
73	14	The focus needs to be to work with small businesses and offer reduced business rents.

74	8	Wage employees cannot afford to live in Sisters.
74	10	We should support the business that pay yearly rent rather than Transient.
75	9	Have never noticed that plastic bags are in issue in town.
75	10	100' set back is excessive.
75	14	Too much City Government can be a negative thing.
76	N/A	N/A
77	8	Rising costs and lack of availability effect our labor pool.
77	12	Snow Dance
78	N/A	N/A
79	14	Affordable housing needs to be a priority.
80	9	Ask customers if need a bag. Promote water bottle fill stations.
81	12	Winter festivals including music and food for January, February
82	N/A	N/A
83	8	Nowhere to rent and if so, too expensive
84	10	Keep the 100' set back.
84	14	Concerned about noise.
85	11	Depends on cost.
86	8	Lack of affordable housing
86	9	Use paper bags or bring sacks themselves.
87	N/A	N/A
88	N/A	N/A

89	8	Employees cannot find housing in Sisters. Live in Bend or Redmond, quit when they find work in their own town.
89	9	\$.05 discount for customers who bring own bag.
89	10	This would create higher foot traffic for downtown businesses.
89	11	We pay a lot of money for snow removal now. Would be great to have it taken care of automatically.
89	12	Have the off Cascade streets lit up for the holidays to attract visitors there.
90	12	Winter music festivals
91	N/A	N/A
92	N/A	N/A
93	9	The problem lies with educating customers on how to recycle.
93	12	In town sledding event for families.
94	N/A	N/A
95	8	Retail businesses need part time/temp staff for seasonal work.
95	10	Maybe 50' would be enough.
95	12	Some sort of Winter event that is more City wide not just one corner of town.
96	N/A	N/A
97	10	Do not eliminate setback. Maybe 80' would be enough.
98	14	Concerned houses are being built too close together. Not enough parking for this. Is traffic being considered.
99	N/A	N/A

100	N/A	N/A
101	N/A	N/A
102	8	Retail jobs are not high paying. Hard for Single women to find affordable housing here.
102	9	Purchase bio degradable bags.
102	10	When it was allowed in the past, the street looked very junky and it detracted from the year round businesses.
102	11	Would it cover private back lots?
102	12	Hard to figure out with weather here so unpredictable.
103	11	Sidewalk clearing should be property owner responsibility.
104	9	Use biodegradable bags.
105	9	Stay out of retailers business. We should choose what type of bag to use.
105	10	Extend the 100' setback to Main and Hood.
105	12	Multi Use Facility where current Forest Service is located.
105	14	Concerned that City is biased toward Marijuana and does not support Business in town.
106	9	Govt. prohibition is wrong. Education would be better.
107	8	Use a lot of contract workers. Basically no place for them to rent in town.
107	9	Use biodegradable.
107	11	Depends on cost.
107	14	Make every effort to keep trees. Streets need more lighting after dark. Build more apartments, maximize space.

108	N/A	N/A
109	8	Have had employees living in campsites. There was no housing available in Sisters.
110	9	Education and incentives
110	11	Depends on costs.
111	8	Have to pay higher wages in order to bring people in.
111	12	Need more Christmas lights and leave them up longer.
111	14	Would like to have business owners in Sisters get to vote on Marijuana issue in Nov. even if do not live in Sisters.
112	9	Provide places for recycling.
112	11	Should be part of City budget.
113	8	Many employees drive in from Redmond or Bend or live out in forest in RVs
113	12	Fitness/exercise events. Brewery/snow events.
113	14	Sisters needs more resources for recycling/composting.
114	8	All employees live in Redmond or Bend.
115	14	The City needs to take care of other streets not just the downtown area.
116	8	My employees can barely afford housing. Need less expensive housing for Singles/college students etc.
116	11	Only if snow removal included the business along Hwy 20.
117	N/A	N/A
118	N/A	N/A
119	N/A	N/A
