COLUMBIA BASIN BUSINESS RETENTION AND EXPANSION PROJECT

REPORT ON BASIN-BOUNDARY BUSINESSES

WINTER 2016

The Columbia Basin Rural Development Institute, at Selkirk College, is a regional research centre that supports informed decision-making through the provision of information, applied research and related outreach and extension support. Visit www.cbrdi.ca for more information.

EXECUTIVE SUMMARY

This report describes findings from a Business Retention and Expansion (BRE) survey conducted at 795 businesses in the Basin-Boundary region between 2012 and 2015. BRE is an action-oriented and community-based approach to business and economic development. It promotes job growth by helping communities to learn about concerns of, as well as opportunities for, local businesses and to set priorities for projects to address those needs.

PARTICIPATING COMMUNITIES

The distribution of BRE Pilot interviews is as follows:

Sub Corridor	Businesses Surveyed
Castlegar and Area	6
Christina Lake and Area	8
Invermere, Canal Flats and Area	9
Creston and Area	10
Fernie and Area	13
Kettle Valley Area	20
Cranbrook and Area	27
Grand Forks and Area	31
Nelson and Area	32
Nakusp and Area	46
Revelstoke and Area	49
Kimberley and Area	60
Sparwood	65
Kaslo and Area	80
Slocan Valley Area	81
Golden and Area	108
Lower Columbia Area	150
Total	795

Key Research Findings

Select survey results are summarized below.

Survey Module	Finding
Company Information	The highest number of respondents' businesses are classified as 'Retail Trade', 'Accommodation and Food Services' and 'Professional, Scientific and Technical Services' under the North American Industry Classification System (NAICS). Manufacturing follows closely.
	Market opportunities and proximity to family are the most frequently cited reasons for locating in the region.
	Over 37% of companies have been in business for more than 20 years.
	Nearly half of the companies are 'growing'.
Local Workforce	Survey participants provide roughly 16,000 jobs for the region's workforce.
	11,800 of these jobs are full-time.
	Safety/First Aid/Food Safe, Sales & Marketing, Business Management, and Customer Service were most commonly listed as key training areas.
Sales	36% of businesses expect that their sales will grow by between 1 and 9% over the next year; 28% expect between 10% and 24% growth in sales.
	Approximately 50% of businesses have the majority (over 50%) of their sales generated by their top 3 customers. *This question had a low response rate.*
	Most (over 70%) sales are to customers within the community or region.
	Computers and Office Supplies, Food, and Construction Materials are the top supplies for which business would like to find regional suppliers.
Facilities and Equipment	60% of businesses own the facility in which they operate.
	Nearly half of businesses plan to expand within 3 years, with 88% of those indicating that expansion will occur within the community.
	Top barriers to expansion are financing options, lack of skilled staff, accessing new markets and lack of suitable premises.
Government Services	Top rated government services include water and sewage supply, telecommunications, recycling and access to highways/roadways. The lowest ratings include access to airport facilities and availability of appropriately zoned land[1].
	Access to airports, telecommunications, and availability of employment lands[2] (appropriately zoned lands and buildings for lease/purchase) are the areas identified for municipal/regional government to improve.
Business Climate	Businesses rated the overall business climate as: Excellent or Good (42%), Fair or Poor (58%). 67% of businesses believe that the business climate will improve over the next five years.
	Business climate factors that received the highest ratings include Cultural and

[1] For more information, please see the CBRDI report, "Employment Lands: Understanding Supply, Demand, & utilization of wealth generating Lands in the Columbia Basin-Boundary Region of BC, Winter 2014

[2] Ibid 1

	Recreational Amenities, Education (K-12 and post-secondary) Access, and Quality of Local Government. The lowest ratings went to: Housing, Local Tax Structure, and Economic Development
	Businesses most commonly listed Location, Lifestyle, and Sense of Community as strengths as a place to do business.
	The business competitiveness factors that are most important to respondents include availability of telecommunications, improvement of customer service, workplace health & safety, transportation, and workforce skill development.
	The top three rated economic drivers for the next five years are: tourism, attracting new residents, and technology based businesses.
Assessment and Plans	The overall health of their company was rated as Excellent or Good by 81% of respondents.
	Roughly 85% of businesses rate the risk of closing or downsizing as ***low***.

Next Steps and Potential Actions

The results of this survey can be used to inform short- and long-term planning. In addition, a number of businesses would benefit from follow-up support. Taking a regional perspective, it is recommended that the regional governments, Ministry of Jobs Tourism & Skills Training, Selkirk College and College of the Rockies, the CBT and the RDI consider programming action that can facilitate effective responses at the community level. Research findings suggest that the following action areas have the greatest potential to improve the business climate:

Regional Workforce

The Basin-Boundary region hosts a population of 161,741[3]. The most recent release of the Labour Force Survey indicates that roughly 76,500[4] are employed. There are roughly 16,000 employees[5] at companies interviewed as a part of the Basin-Boundary BRE. Of these, over 11,000 are full-time jobs. The BRE surveys have covered up to 20% of employment opportunities within the Basin-Boundary region (higher ratios in the host communities).

Those businesses experiencing recruitment difficulties are looking for: sales staff, professionals, technical staff, hospitality and food & beverage staff, mechanics, skilled trades, labourers, administrative or clerical staff, machine operators, management staff, electronics workers, and construction workers. Skilled staff make up most of the surveyed workforce.

When asked about what pressures their workforce faces, employers reported that transportation, childcare, housing and cost of living were top of the list. These are the issues, outside of the employers' control, that are perceived to affect recruitment and retention, either positively or negatively, in their local workforce.

[3] Source: Statistics Canada, Census 2011
[4] Note: Figure includes imputations for those regions in Caribou and Thompson-Okanagen Development Regions
[5] Imputed assuming normal distributions

These responses point to workforce development actions that could improve the region's skill-set and working conditions. Focused training programs may be developed to meet skills gaps. And, social programming may improve the general welfare of the workforce.

Youth Employment

The data indicates that essential employees under the age of 26 are in the minority, making up only 8% of the reported employees. Yet, this demographic represents nearly 16% of the working age population (15 to 65). Increasing youth involvement in the local workforce could be encouraged through a better understanding of the low youth employment rate, connecting local businesses with youth employment programs (federally, provincially and/or through CBT), and connecting local businesses with local schools and post-secondary institutions.

Training

A lack of technical training and colleges/universities were cited as factors contributing to a poor business climate. Businesses identified that training was needed in the areas of emerging technologies, skilled trades and health and safety. Improving technical training and workforce skill development is important for business competitiveness. Future initiatives could include supporting networks to help businesses identify shared training needs, and working with educational institutions and training organizations to ensure local skill requirements are considered in programming.

Business Growth & Expansion

49% of businesses in the region report being in the growth phase of the business life-cycle, and 49% indicate that they are planning to expand within the next three years. These investments represent roughly $400M. Roughly 67% of those businesses planning to expand feel their existing site is adequate, and that the majority of expansion plans will occur within their current community.

Assistance could come in the form of navigating local regulations, identifying and securing new sites, and connecting businesses with resources to assist in expansion projects. Improvements could be made to have local resources approach businesses proactively to understand barriers and work collaboratively towards solutions. These potential actions and any others, should be designed to address the stated barriers to expansion which include accessing financing, lack of skilled staff, and accessing new markets.

Economic Diversification

A lack of diversification was cited one of the primary barriers to growth. Businesses identified tourism, manufacturing and technological sectors as important to attract, but also indicated that the economic drivers with the highest future growth potential are tourism, amenity migrants and technology based business. These seem well in line with one another. Actions to increase diversification could include fostering the entrepreneurial culture through workforce skills development and business management support, supporting marketing efforts aimed at high-skill amenity migrants, and helping businesses form support and collaboration networks, particularly in the manufacturing and technology sectors.

Findings indicate that the majority of supplies come from outside the local region, with only 29% of supplies sourced locally. The most cited reasons why supplies are sourced outside of the local area are: unavailability, higher costs, and quality concerns. Encouraging collaborative or cooperative buying strategies may help potential suppliers build a stronger case for locating in the Basin-Boundary.

Local businesses do not appear to engage with government procurement processes, with only 30% of businesses indicating that they have. Education and awareness of the opportunities available through municipal, regional, and provincial procurement processes could be promoted through seminars, profiles in communication material, and promotion on relevant websites.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of both business and the community. Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance. Open, instructive training sessions have the potential to provide a base level of support to a large number of businesses; however, given the importance of individual circumstances in business and succession planning, and a stated preference for individual coaching, a one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses.

Government Services

A recurring theme was the lack of buildings and land available for lease or purchase. With a large number of businesses planning expansions contingent on finding new space, there is an opportunity for the local government to use the RDI's Employment Lands analysis as a basis for work with local businesses to understand existing and future business needs and assess land use planning at a micro level. Issues around the perceived lack of available land and servicing costs may be addressed through communication strategies between the local government, local businesses and the community. Opportunities may exist locally for changes to land use designations and zoning that could serve both the greater community and local businesses. Collaboration and dialogue with targeted businesses could produce valuable results and innovative solutions.

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Project Overview

This report describes findings from a Business Retention and Expansion (BRE) survey[6] conducted throughout the Basin-Boundary between 2011 and 2014. Various local government representatives and community-lead economic development groups acted as the community leads for the data-collection and subsequent action plans and programming. The Columbia Basin Rural Development Institute (RDI) provided training, data analysis and report writing support.

The BRE Concept

BRE is an action-oriented and community-based approach to business and economic development. It promotes job growth by helping communities to learn about the concerns of, as well as opportunities for, local businesses and to set priorities for projects to address those needs. Ultimately, communities will have greater success in attracting new businesses if existing businesses are content with local economic conditions and community support. Business development and job creation are key factors in fostering healthy and vibrant communities—depending on the characteristics of a community's economy, anywhere from 40 to 90 per cent of new jobs come from existing businesses.

Project Objectives

Objectives of the regional BRE project were as follows:

1. Identify the needs, concerns, and opportunities of existing local businesses in order that, where appropriate, local action can be taken to respond to the businesses' needs or development opportunities;
2. Learn of the future plans of the region's businesses with respect to expansion, relocation and /or retention and follow-up where assistance can be provided;
3. Promote and support community engagement with the business community and capacity for planning and delivery of economic development programs;
4. Fill gaps in the region's economic data at a local and a regional level.

Research Considerations

The BRE Survey

The RDI has a licence agreement with the Economic Development Association of BC for BC Business Counts, a program that provides access to an online BRE survey, contact management, and reporting system called ExecutivePulse. Data presented in this report were collected as part of a comprehensive BRE survey that is aligned with surveys conducted by other participants in the BC Business Counts program across the province of BC. Survey data can therefore be analyzed at a community, sub-regional, regional and provincial level.

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[6] Short and Long BRE survey text are available by request

The base survey, consisting of 94 questions, includes modules for company information, the local workforce, sales, facilities and equipment, and future plans for growth or succession. Based on feedback from a BRE regional advisory group, thirteen region-specific questions were appended to the base BRE survey.

THE DATA SET

To generate an initial set of potential research participants, BRE Project Leads typically worked with their local governments, Chambers of Commerce and other community level economic development practitioners (EDPs) to generate a comprehensive list of local businesses. The BRE project teams then selected businesses, initiated communications and began arranging interviews.

Businesses were typically surveyed in individual, face-to-face interviews[7]. In total 795 respondents participated in the BRE survey during the pilot period (2012 – 2015). The number of respondents to each question varied. Some communities chose to administer only the standard BRE survey, some a truncated version of the BRE survey, while others administered the RDI add-on survey. Further, some respondents chose not to answer certain questions.

DATA COLLECTION

The community level BRE project teams of trained researchers were responsible for the entire survey process. This included arranging and undertaking the structured interviews which took between 1 to 1.5 hours, plus data entry. In total the process took approximately four hours per business.

DATA INPUT, ANALYSIS AND REPORTING

Data was entered into the ExecutivePulse system by the community level BRE project teams immediately following the interviews. To ensure confidentiality and data security, company-level data was only made accessible to RDI staff and the community level EDPs, all of whom signed confidentiality agreements.

Quantitative data were analysed using descriptive statistics and qualitative data were analysed using the grounded theory method of generating key coding themes. Based on the results of data analysis activities, an initial set of recommendations was generated by RDI and then reviewed with the community level BRE project teams. Findings and related recommendations were assembled into this report by RDI researchers.

[7] One community used an on-line distributed survey for additional data collection.

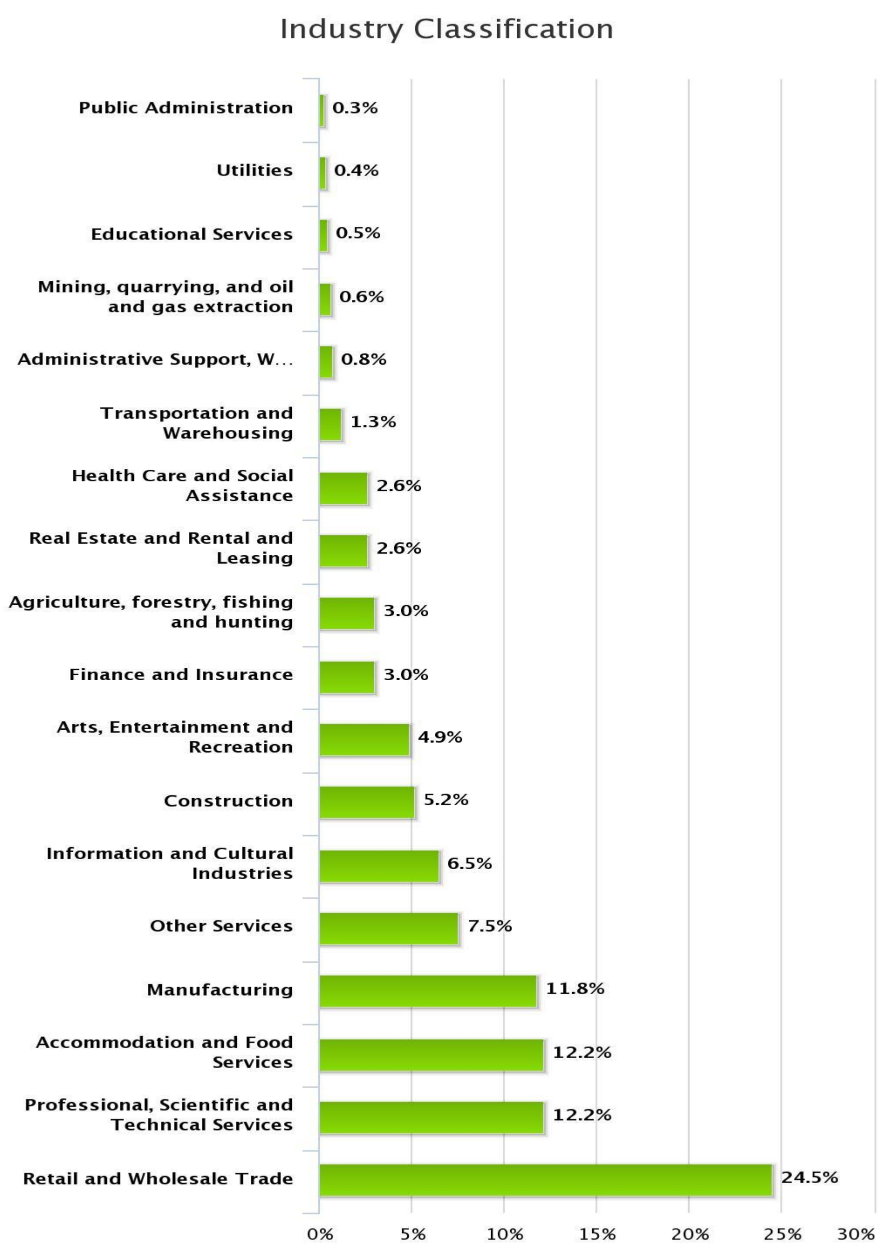
Research Findings

Company Information

Type of Product/Service Offered

Businesses interviewed represent a diverse cross-section of industries. Most common are Retail and Wholesale Trade (24.5% or 195 respondents), Professional, Scientific and Technical Services (12.2% or 97 respondents), and Accommodation and Food Services (12.2% or 97 respondents).

Figure 1: Industry classification

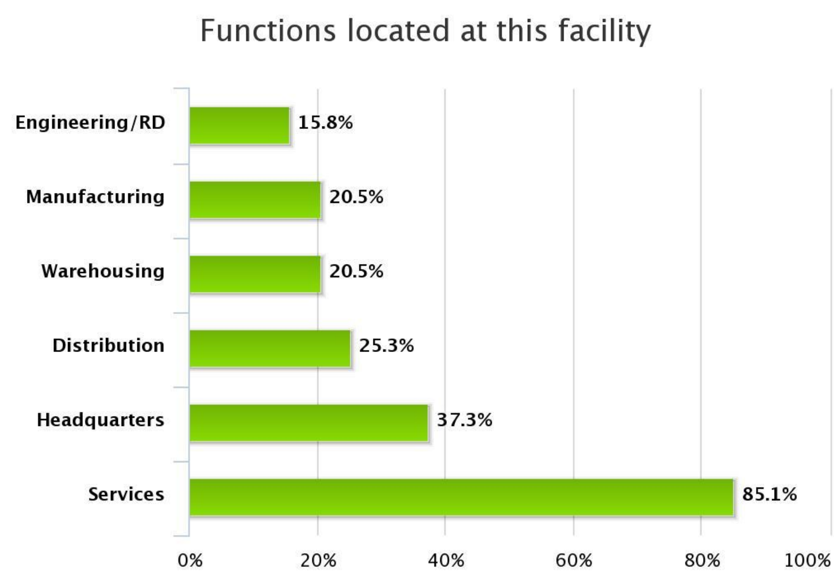


Note: 795 respondents

Facility Function

The majority of respondents (85% or 410 respondents) indicated that their facility provides services. Other primary functions include headquarters (37% or 180 respondents) and distribution (25% or 122 respondents). Fewer respondents indicated that their facility serves as warehousing, engineering/R&D or for manufacturing purposes[8].

Figure 2: Facility function(s)

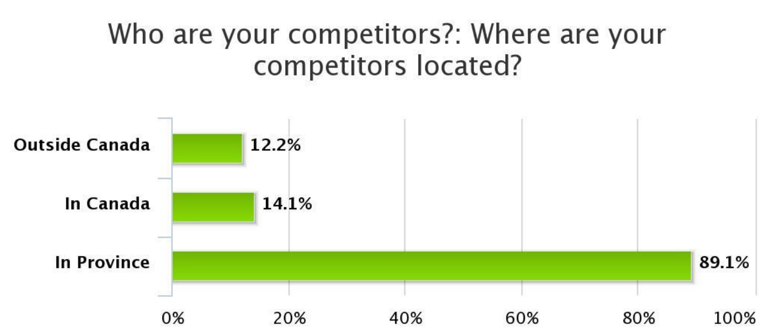


Note: 485 respondents

Competition

The vast majority of competition (89 % or 139 responses) reported was coming from within the province.

Figure 3: Location of primary competitors



Note: 159 respondents

[8] Note: Where percentages add up to more than 100%, respondents have given more than one response.

Factors for Success

Figure 4: Factors for Success: Key Words

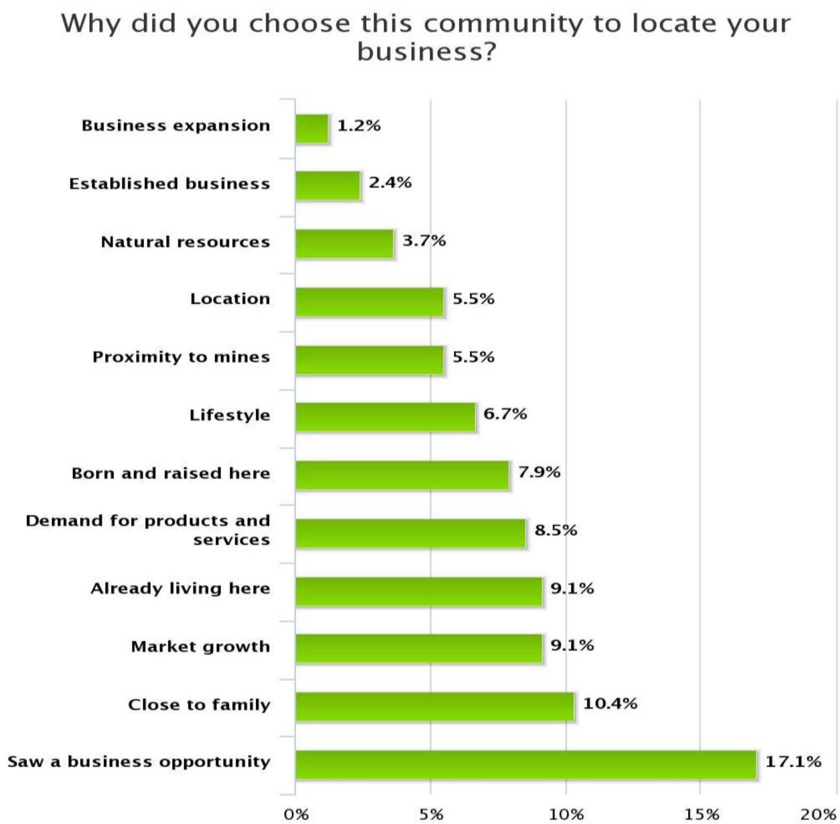
When asked what factors made their company successful in this region, the highest number of respondents (13 % or 86 businesses) cited Quality of Service or Product. Customer Service (13% or 85 businesses), Location (11% or 74 businesses), and Reputation (6% or 38 businesses) were also discussed frequently.

> *"Culture in Nelson, local support, remoteness; contributes to self-reliance for culture and entertainment."*
>
> *"People are willing to support local product."*
>
> *"Businesses are interdependent in this community. Work closely with other companies and work with the mine. Family-based business, has gained trust from the community and grown with the community."*
>
> *"The pristine environment makes retreat experiences positive. Economically more viable to operate a business here due to low real-estate prices and lower overhead costs.*

Choosing a Community

The market opportunities (17% or 28 respondents) and close to family (10% or 17 respondents) were the most frequently cited reasons given for businesses to locate in their community.

Figure 5: Why did you choose this community to locate your business?

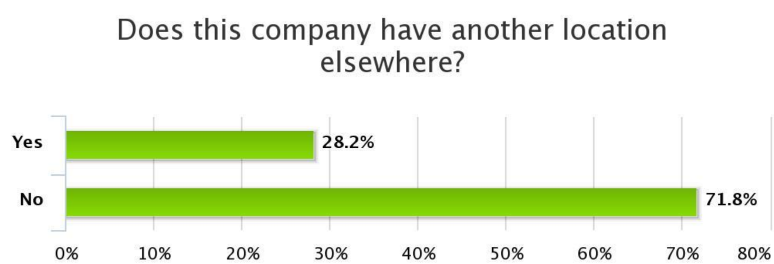


Note: 143 respondents

Other Locations

28% of respondents (149 respondents) indicated that their company has other locations.

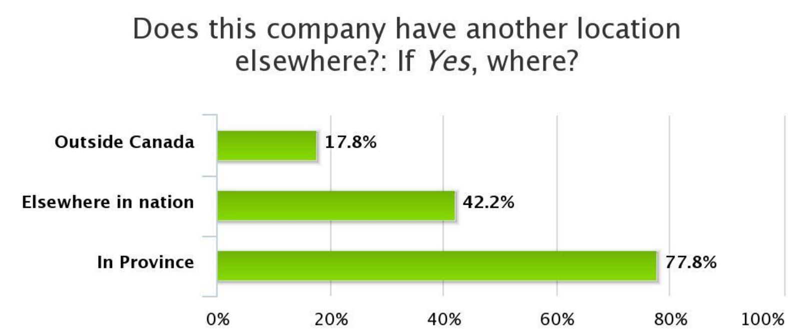
Figure 6: Other Locations



Note: 528 respondents

78% of those businesses (35 respondents) have their other locations in other areas of the province, 42% (19 respondents) have other locations in other parts of Canada and 17% (8 respondents) indicated that their company has another location outside of Canada. [9]

Figure 7: Other Locations



Note: 62 respondents

Of the businesses whose headquarters are ***not*** local (13 in total), 85% (11 businesses) of respondents reported that their headquarters are located in Canada, 8% (1 business) indicated that they are headquartered elsewhere in the United States and one in China.

Figure 8: Location of headquarters

Note: 13 respondents

Age and Life Cycle Stage

Nearly half of respondents (49% or 373 respondents) reported that their business is in the 'growing' life cycle stage. Another 36% (275 businesses) indicated that their business is in the 'maturing' stage. Only 10% (72 businesses) indicated that they are in the 'emerging' stages, and 5% (38 businesses) indicated that they were declining.

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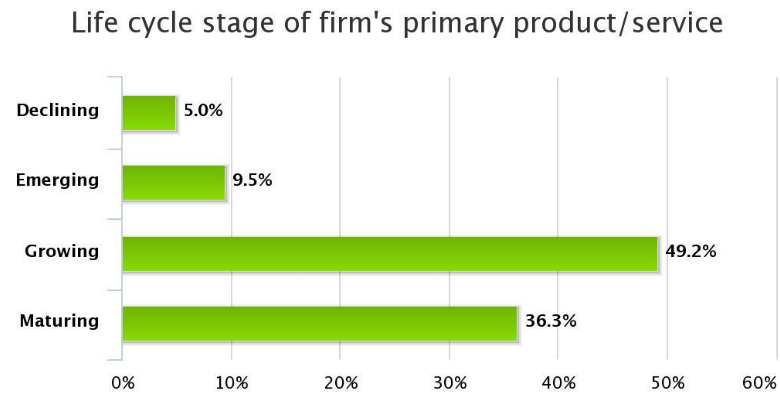
[9] Responses reflect that respondents can have other locations in more than one other location. Therefore total number of other locations exceeds number of respondents.

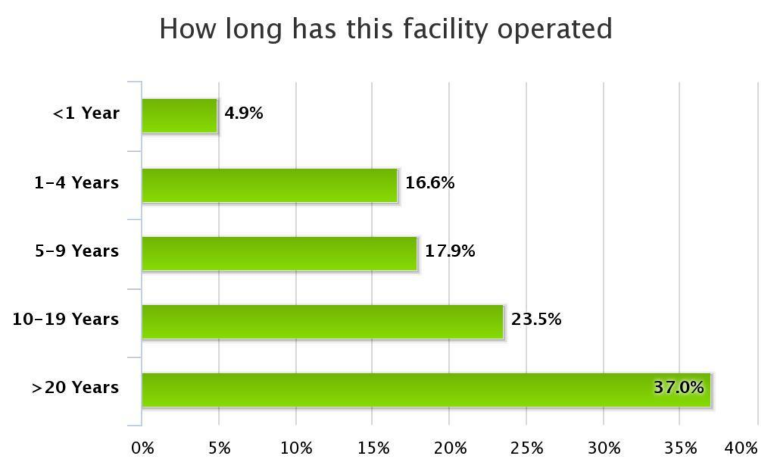
Figure 9: Life cycle stage



Note: 758 respondents

Many businesses (285 respondents or 37%) reported that they have been in business for more than 20 years. A significant number have reported that they have been in business for 10 – 19 years (181 respondents or 24%), 5 – 9 years (138 respondents or 18%), 1-4 years (128 respondents or 17%), and less than one year (38 respondents or 5%).

Figure 10: Length of time in business



Note: 770 respondents

Ownership and Management

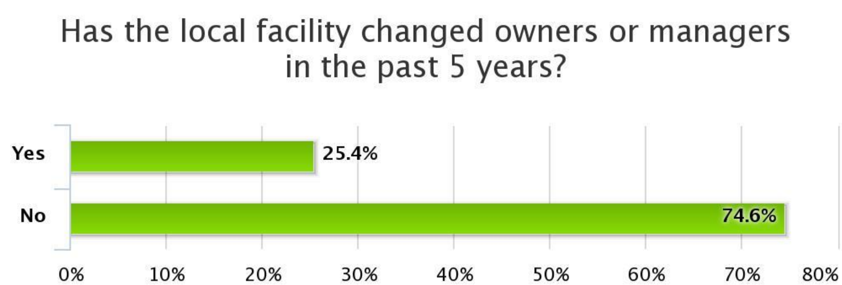
Most respondents (400 respondents or 51%) indicated that their business is classified as a corporation, while 28% (220 respondents) indicated that they are a sole proprietorship. The remainder of businesses are registered as a partnership (81 respondents), non-profit (32 respondents), limited liability partnership (25 respondents), or other type of business (19 respondents).

Figure 11: Type of business

Note: 777 respondents

75% of businesses (514 businesses) have not seen a management or ownership change in the last 5 years, while 25% of businesses (175 businesses) have. 125 businesses (16%) are expecting an ownership change in the near future. Of the respondents that have seen changes in management and/or ownership, 80% (135 businesses) report that change has had a positive impact.

Figure 12: Ownership and management changes in last 5 years

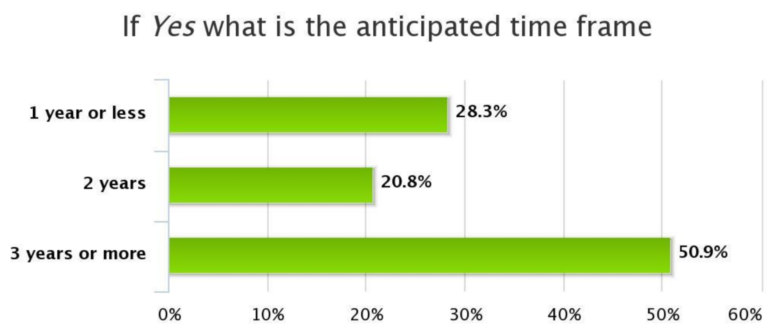


Note: 689 respondents

Succession and Business Plans

Of the 125 businesses that responded and reported a pending ownership change, half expect the change to take 3 years or more, the remainder expect a more immediate change.

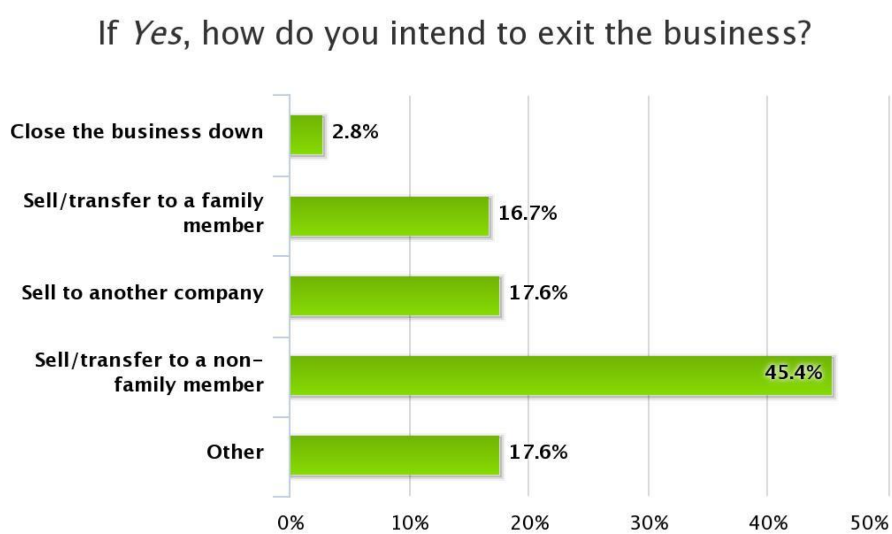
Figure 13: Anticipated timeline for ownership change



Note: 106 respondents

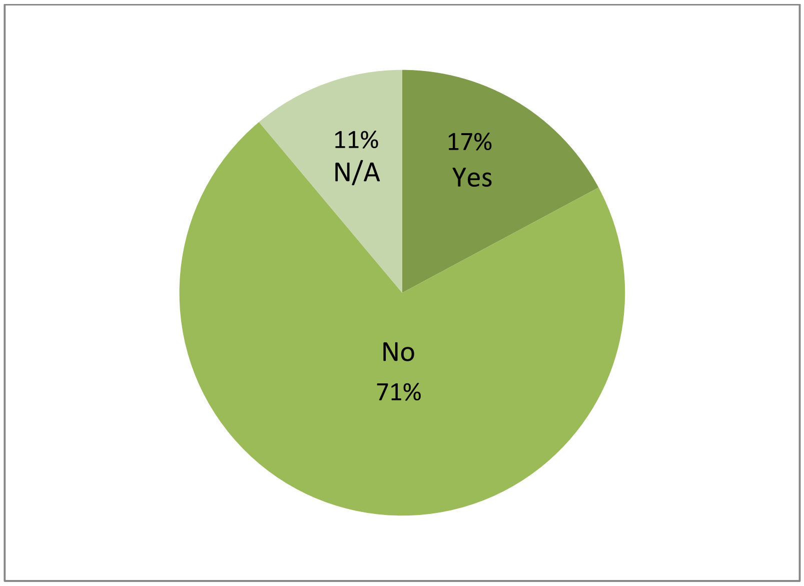
63% of respondents (68 respondents) expect that the current owner will exit the business by selling it to a non-family member or to another company, while only 17% (18 respondents) expect it to be sold/transferred to a family member.

Figure 14: Anticipated exit strategy



Note: 108 respondents

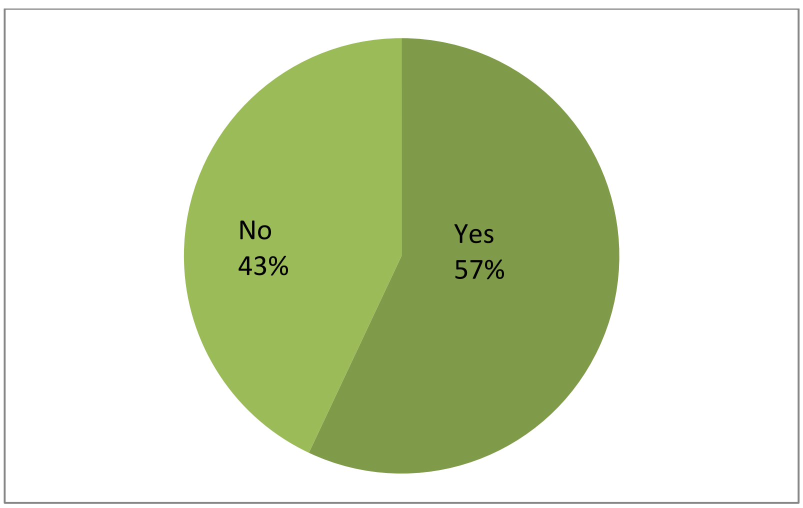
Figure 15: Existence of formal succession plan



Only 17% of respondents (114 respondents) indicated that they have a succession plan in place.

Note: 655 respondents

Figure 16: Existence of current business plan



57% of respondents (383 respondents) indicated that they have a current business plan in place.

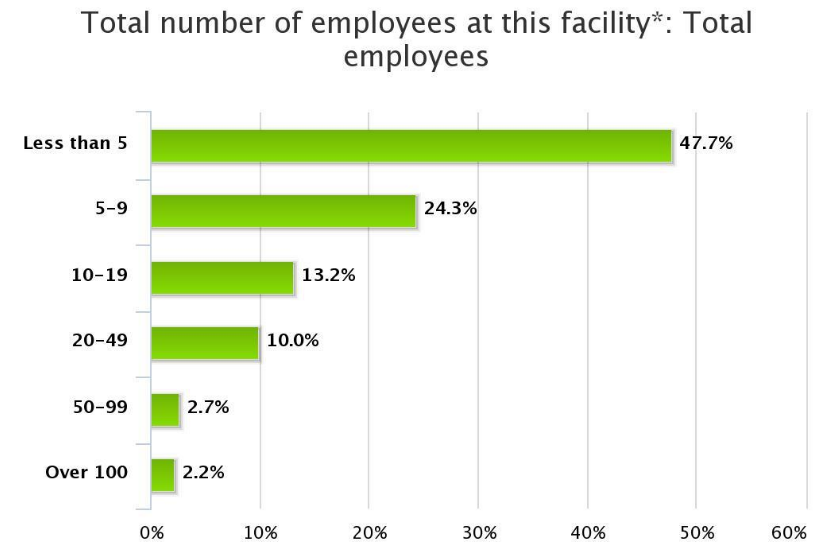
Note: 676 respondents

LOCAL WORKFORCE

Size of Workforce

The 782 businesses interviewed reported a total of 16,056 employees. 48%, or 373 of the businesses surveyed indicated that they have fewer than five employees, and just 2%, or 17 of the businesses indicated that they have over 100 employees.

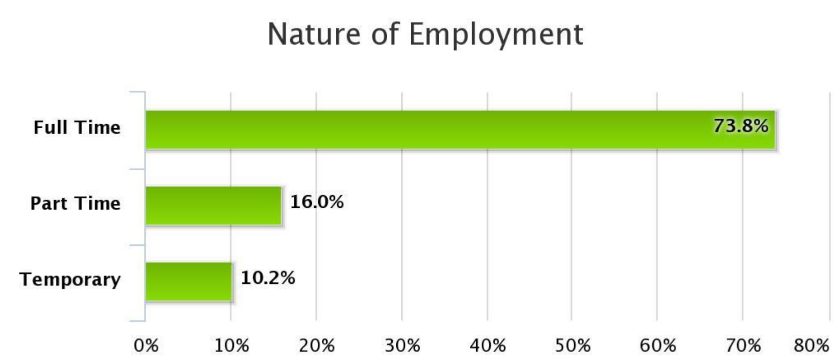
Figure 17: Total number of employees



Note: 782 respondents

74% (11,844) of employment positions at surveyed businesses are full-time, while only 16% (2567) are part-time and 10% (1645) are temporary.

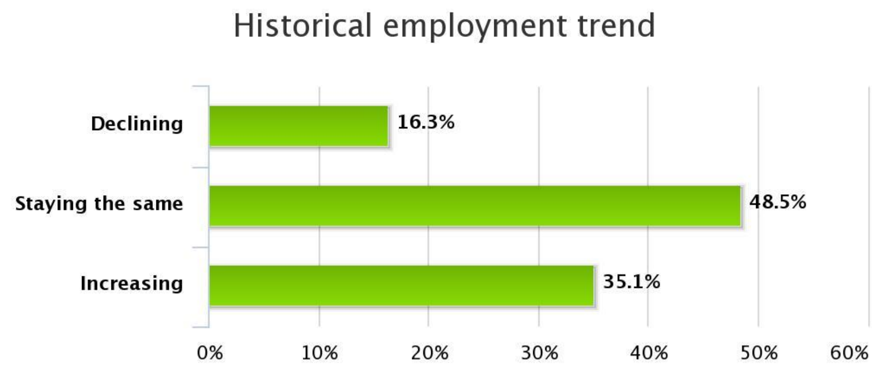
Figure 18: Nature of employment



Note: 782 respondents

84% of respondents (569 businesses) indicated that the number of employees at their business has increased (35% 239 businesses) or stayed the same (49% 330 businesses). Only 16% (111 businesses) indicated a decrease. This may be a reflection of an aging workforce and increased retirements.

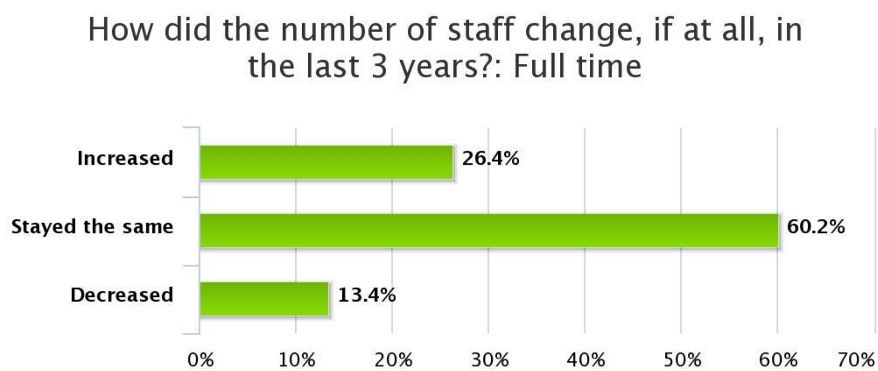
Figure 19: Historical Employment trend[10]



Note: 680 respondents

The last three years has seen increased growth, with 26% of businesses (173 respondents), or stability, 60% (394 respondents), in the size of the full-time workforce over the last three years.

Figure 20: Full-time employment trend over last 3 years

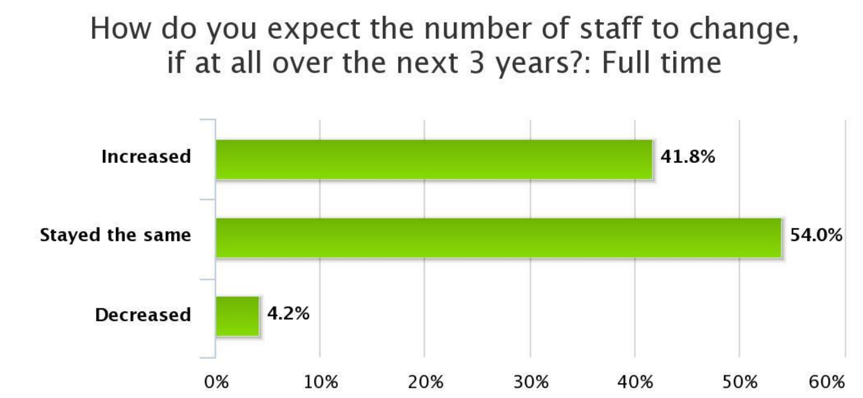


Note: 655 respondents

42% of businesses (266 respondents) project growth, and 54% (344 respondents) project stability in their full-time workforce over the next 3 years. 4% (or 27 respondents) of businesses indicated they expected a decrease over the next 3 years.

[10] The question considered a 10 year historical trend.

Figure 21: Full time employment trend over next 3 years

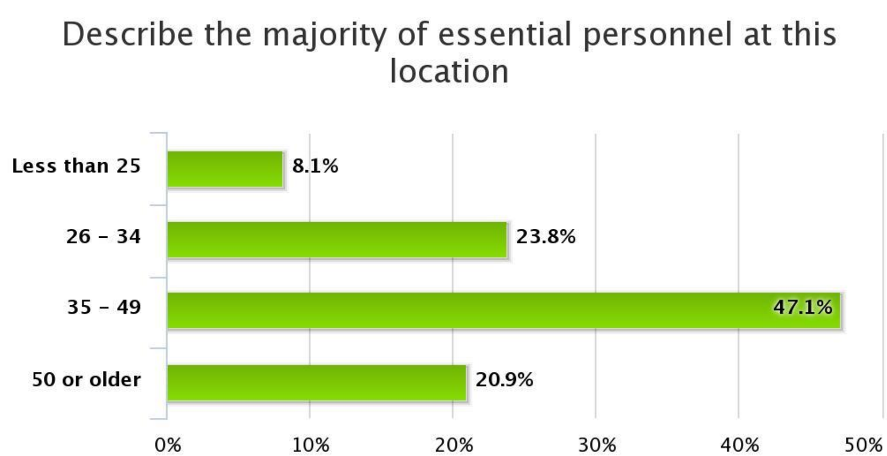


Note: 637 respondents

Workforce Demographics

Of the responses received, 47% (313 responses) indicated that the majority of their essential employees are between 35 and 49 years old. 24% (158 responses) indicate the majority is between 26 and 34 years of age, and only 8% (54) indicate the majority are under 25 years old. , 21% (139) indicate the majority of their essential personnel are close to retirement (over 50 years of age).

Figure 22: Age of the majority of essential employees



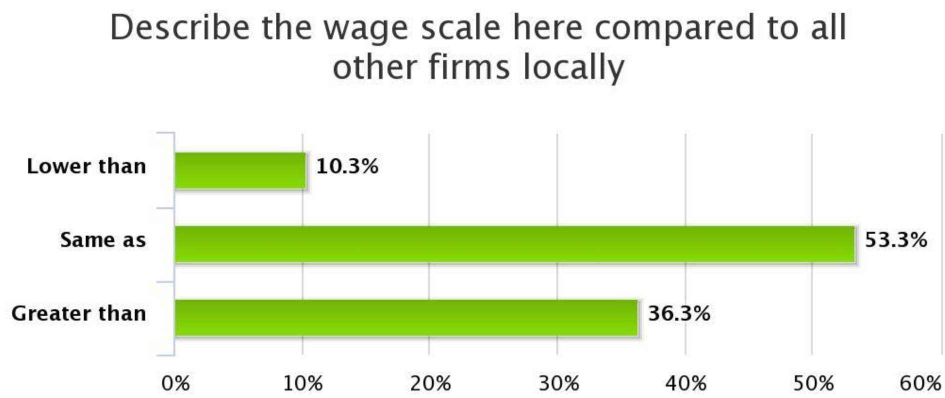
Note: 664 respondents

Wages

When reporting on average wages for skilled or professional workers, 33% of businesses 152 responses) indicated they pay between $20 and $29 per hour. The most commonly reported average wage for semi-skilled workers (28% or 105 businesses) was between $15 and $19 with an equal number reporting wages between $20 and $29 and the most commonly reported average wage for entry-level workers (50% or 146 respondents) was $10 to $13.

53% of respondents (295 respondents) reported that their wage scale is similar to other businesses in the region.[11]

Figure 23: Wages in relation to other businesses in the region

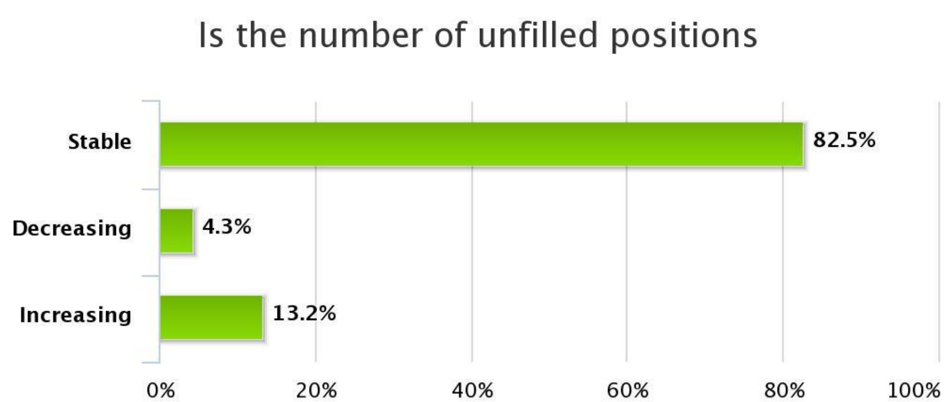


Note: 553 respondents

Recruitment and Retention

Of those businesses that responded, 83%% (462 respondents) indicated that the number of unfilled positions at their company would remain constant.

Figure 24: Trend in unfilled positions



Note: 560 respondents

The majority of respondents (89% or 638 respondents) reported that they primarily recruit employees from local labour markets. 4% (32 respondents) recruit nationally, while 5% (36 respondents) report that they recruit provincially, and 2% (11 respondents) reported international recruitment.

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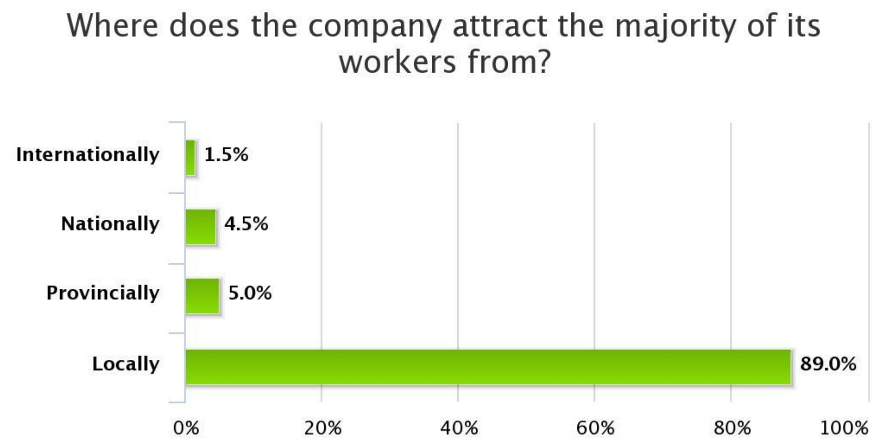
[11] Detailed wage data is found in Appendix A.

Figure 25: Location of workforce recruitment



Note: 717 respondents

Of 694 respondents, 46% (317 respondents) reported recruitment challenges; 52% expect future challenges. Of 683 respondents, 31% (209 respondents) indicated that they have experienced retention challenges.

Figure 26: Recruitment activities

Note: 376 respondents

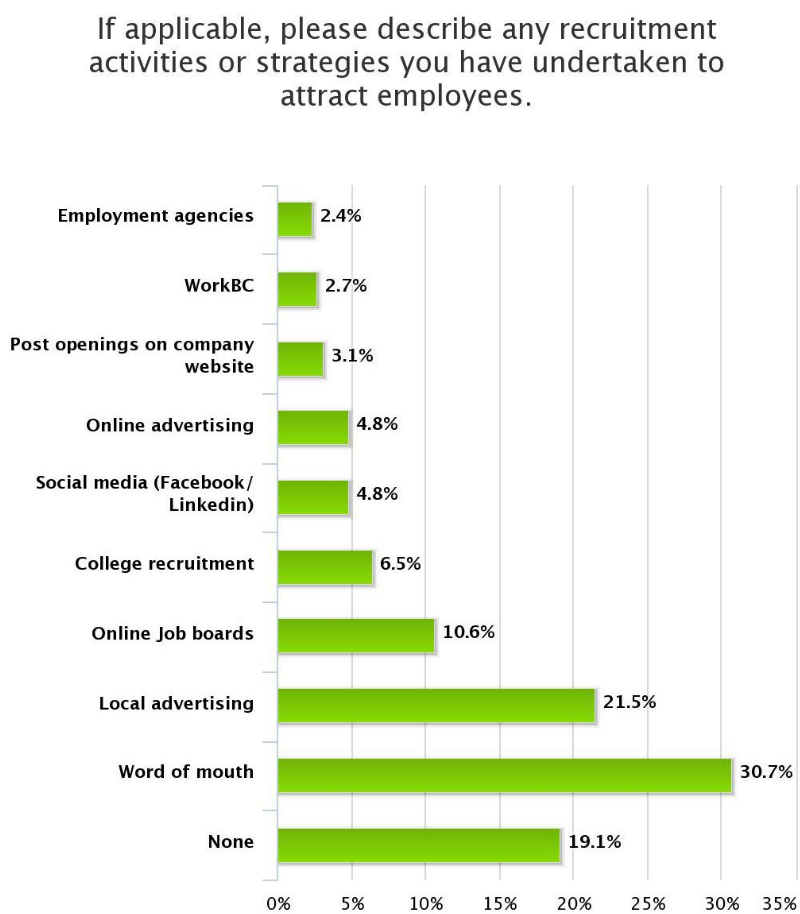
Figure 27: Retention challenges

Note: 422 respondents

When asked what efforts their business has undertaken to retain employees, 422 businesses responded. The most frequent response was to provide competitive wages (24% or 68 respondents). Providing benefits (21% or 58 respondents), supporting a positive work environment (20% or 57 respondents) and offering flexible work schedules (18% or 51 respondents) were other strategies employed. Other factors cited by businesses include offering bonuses (15%) and skills training (12%).

When asked what efforts businesses have undertaken to recruit employees, the most-cited activities were: word-of-mouth (31% or 90 respondents), local advertising (22% or 63 respondents) and online job boards (10% or 31 respondents). Respondents also cited using college recruitment fairs, social media, online advertising and postings on the company web-site.

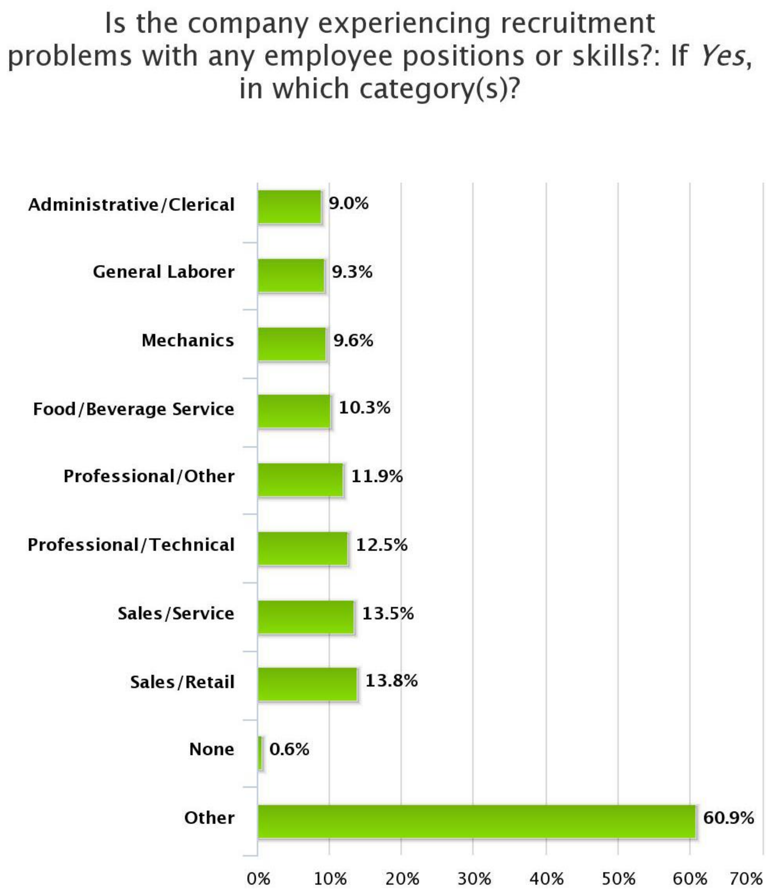
Figure 27: Recruitment Activities



Note: 376 respondents

Of the 317 companies that indicated they were experiencing recruitment challenges, the areas currently in focus include: retail and service sales (27% or 85 respondents), professional or technical (24% or 76 respondents), food and beverage service (10% or 32 respondents), mechanics (10% or 30 respondents), general labourers (9% or 29 respondents), and administrative or clerical positions (9% or 28 respondents). The most significant responses included in the 'other' category include: skilled trades (9% or 29 respondents) and managers (7% or 22 respondents).

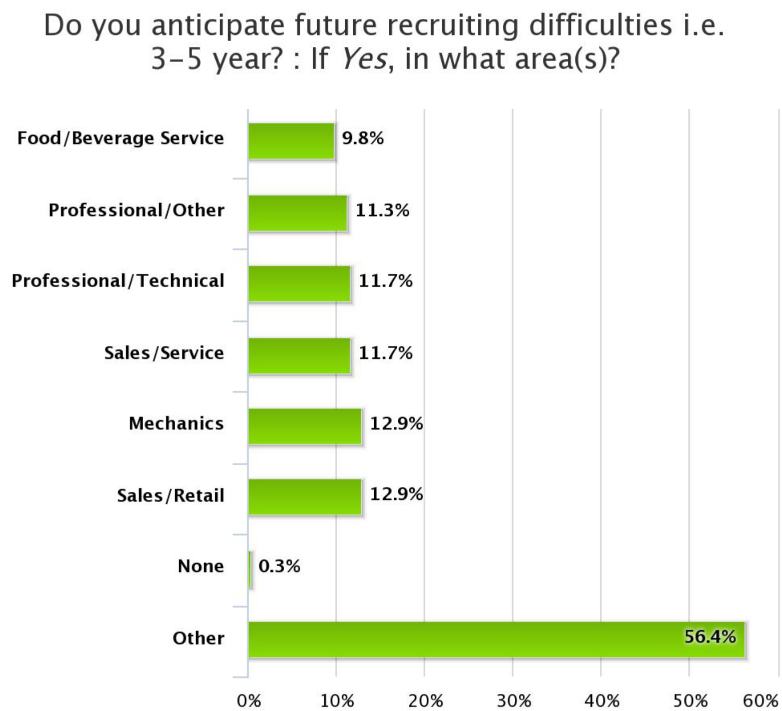
Figure 28: Current recruitment areas



Note: 317 respondents

52% of respondents (350 respondents) anticipate future recruitment difficulties. The most commonly anticipated recruitment challenges include: retail and service sales (24% or 80 respondents), mechanics (13% or 42 respondents), professional and technical positions (23% or 75 respondents). The most significant response included in the 'other' category was skilled trades (8% or 27 respondents).

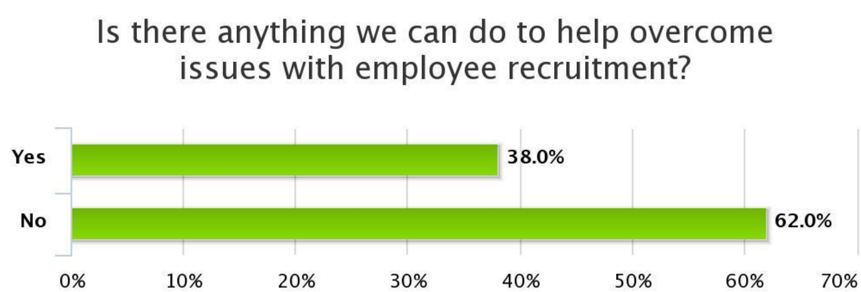
Figure 29: Future areas where recruitment may be challenging



Note: 350 respondents

38% of respondents (57 respondents) indicated that they believed that there were strategies that could be undertaken by external stakeholders (municipal governments and regional support organizations) to address employee recruitment, however, few suggestions were made regarding the nature of these strategies. Suggestions included: establishing a job bank (27% or 11 respondents), providing training support (17% or 7 respondents) and help with foreign worker program (10% or 4 respondents).

Figure 30: Help with recruitment challenges

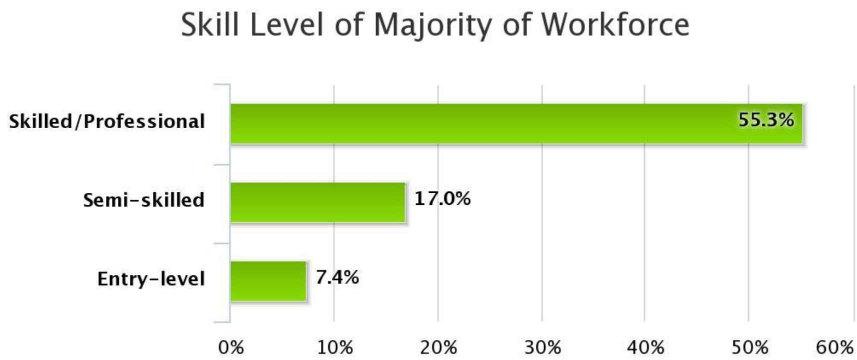


Note: 150 respondents

Skills and Training

The majority of respondents (55% or 368 respondents) indicated that the majority of their workforce is comprised of skilled or professional workers, 17% indicated that their workforce is mainly semi-skilled workers and 7% indicated that entry-level workers make up the majority of their workforce.

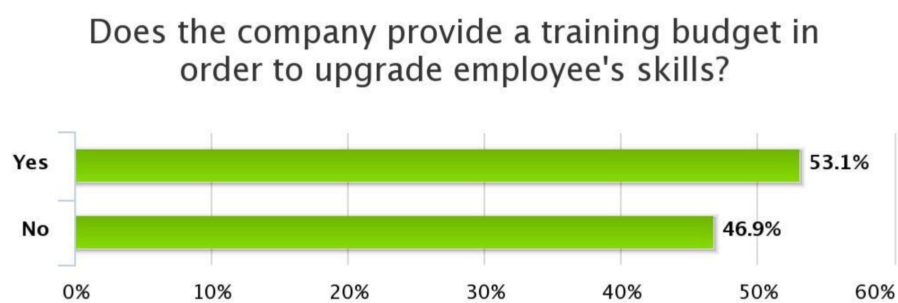
Figure 31: Skill level of majority of workforce



Note: 530 respondents

53% (358 businesses) indicated that there is a training budget to upgrade employee skills. 85% of those (135 businesses) indicated that their company offers in-house training and 39% (61 businesses) use contracted training.

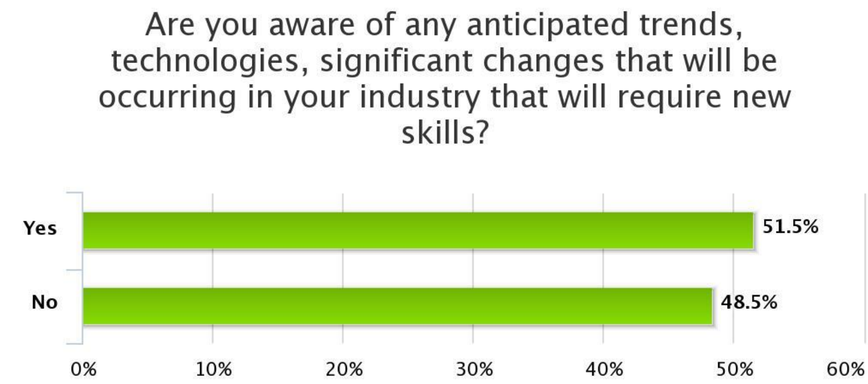
Figure 32: Training Budget



Note: 674 respondents

52% of respondents (340 businesses) indicated that they were aware of trends, technologies, and other significant changes that will be occurring in their industry that will require new skills.

Figure 33: Awareness of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills



Note: 660 respondents

72% or 494 respondents indicated that there are areas of training or professional development that would benefit their employees. Most commonly listed among these areas were First Aid/Food Safe/Safety training (16% or 76 businesses), sales and marketing (15% or 72 respondents) and business/management training (14% or 70 businesses).

Figure 34: Training or professional development needs

Note: 486 respondents

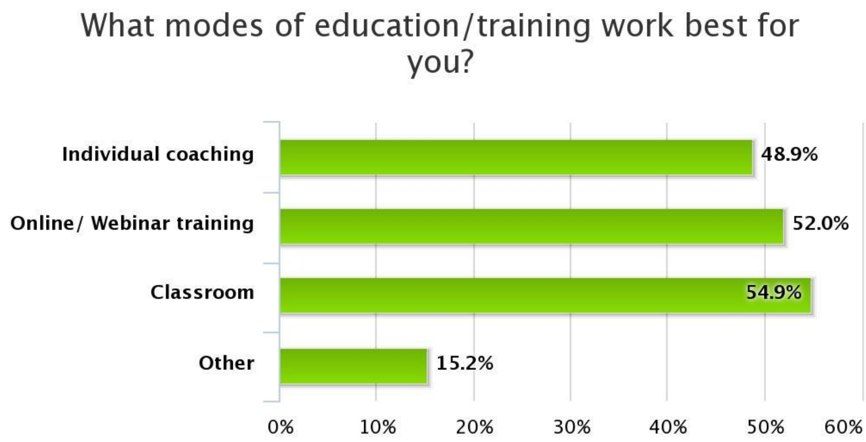
When asked what new training might need to be considered in the next five years, the most commonly cited response was emerging technologies (15% or 14 businesses). Other areas where training will be needed include online marketing (13% or 12 businesses), technology skills, computer training, solar technologies, social media and electronics.

Figure 35: Areas for new Training in next five years

Note: 96 respondents

55% of respondents (350 respondents) stated that they prefer training when it is delivered in a classroom, while 52% (332 respondents) preferred online or a webinar style format, and 49% (312 respondents) expressed a preference for individual coaching. Other training formats that people mentioned include: in-house workshops (9% or 56 respondents), conferences (5% or 35 respondents) and mentorships (1% or 6 respondents).

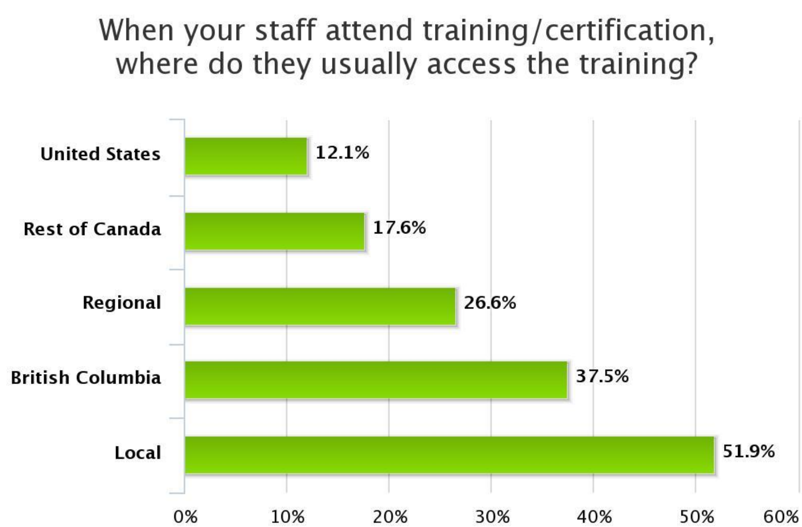
Figure 36: Preferred modes of training



Note: 638 respondents

52% of respondents (309 businesses) typically seek training opportunities that are offered locally, and 37% (223 businesses) travel to other areas in BC, 27% (158 respondents) look regionally, 18% (105 respondents) will look nationally, and 12% (72 respondents) cross the border to the United States.

Figure 37: Usual training locations



Note: 595 respondents

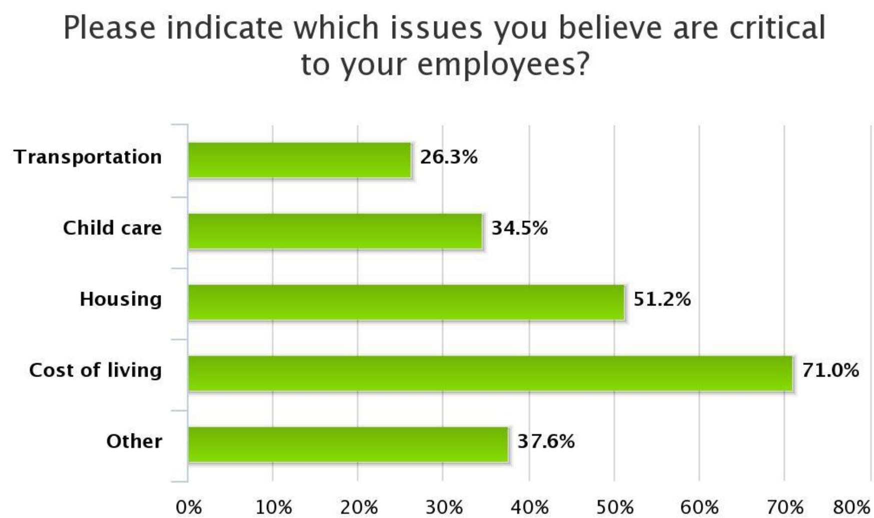
Unions

Only 40 businesses (6%) reported that they have union status.

Employees

The most frequently cited challenges for employees is cost of living (71% or 319 respondents), housing (51% or 230 respondents), child care (34% or 155 respondents) and transportation (26% or 118 respondents).

Figure 38: Critical considerations for employees



Note: 449 respondents

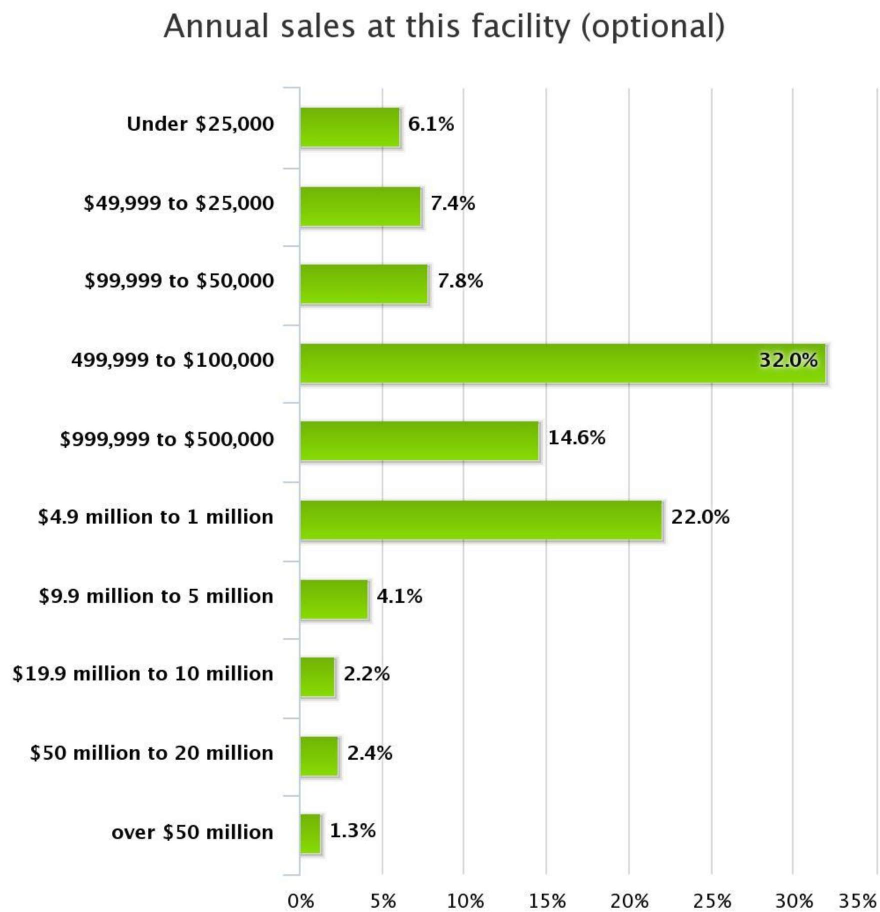
88% of businesses (424 businesses) interviewed reported that over 75% of their employees live within the community, 3% (13 businesses) indicated that 75% of the employees live elsewhere in the region and 1% (7 business) indicated that the majority of their employees live outside of the region.

SALES

Market Size and Share

The highest number of respondents (147 businesses or 32%) reported annual sales between $100K and $500K. The second highest number of respondents (101 businesses or 22%) reported annual sales between $1M and $5M. Interestingly, $500K is roughly the median level of sales for the region; this means that roughly half of the businesses surveyed had revenues below $500K and the other half had revenues over $500K.

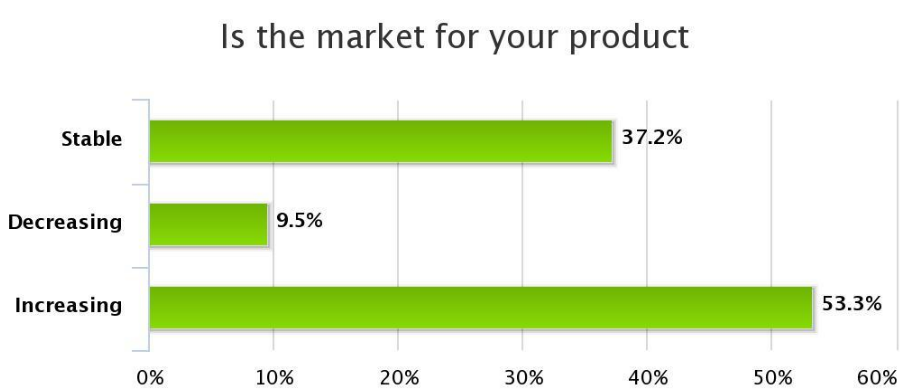
Figure 39: Annual sales



Note: 459 respondents

The majority of businesses interviewed (53% or 410 businesses) indicated that the size of the market for their product or service is increasing. Another 37% (286 businesses), reported that the market is stable.

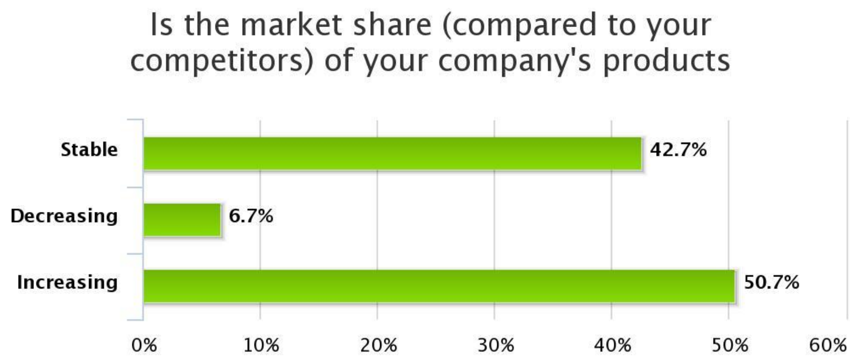
Figure 40: Status of market for product/service



Note: 769 respondents

51% (311 businesses) of respondents indicated that their share of the market for their product, in comparison with their competitors, is increasing, while 43% (262 businesses) indicated that it is stable. A small number of respondents (7% or 41 businesses) indicated that their market share is decreasing.

Figure 41: Market Share in Comparison to Competitors

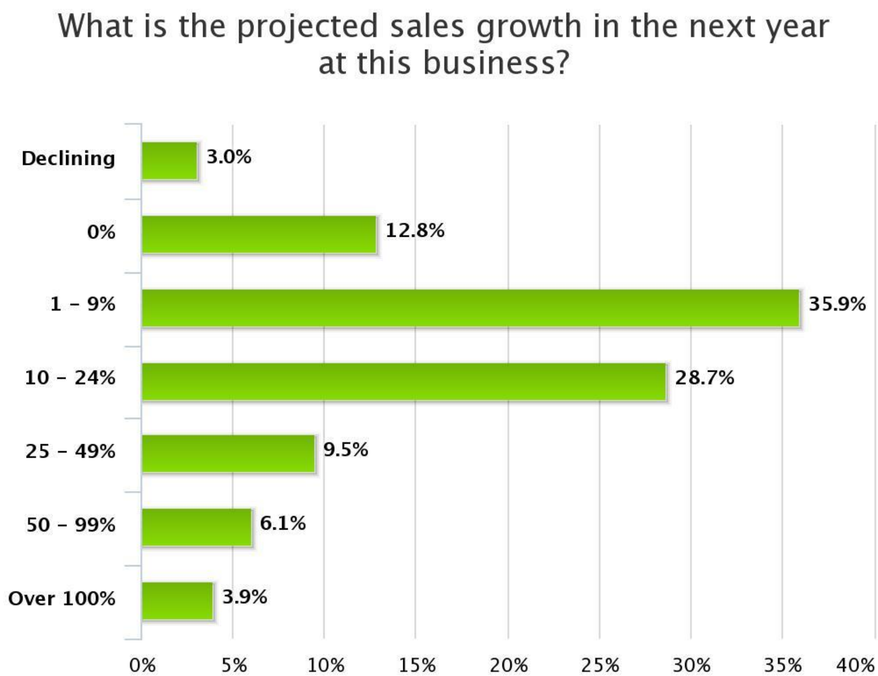


Note: 614 respondents

Growth

36% of respondents (249 businesses) expect to see low growth in sales in the realm of 1 – 9%. Moderate growth in sales of 10-24% over the next year is projected by 29% of respondents (199 businesses). 19% of respondents (135 businesses) expect growth exceeding 24% in the next year. 13% (89 businesses) of respondents expect their sales to remain stagnant, while a further 3% (21 business) expects sales to decline.

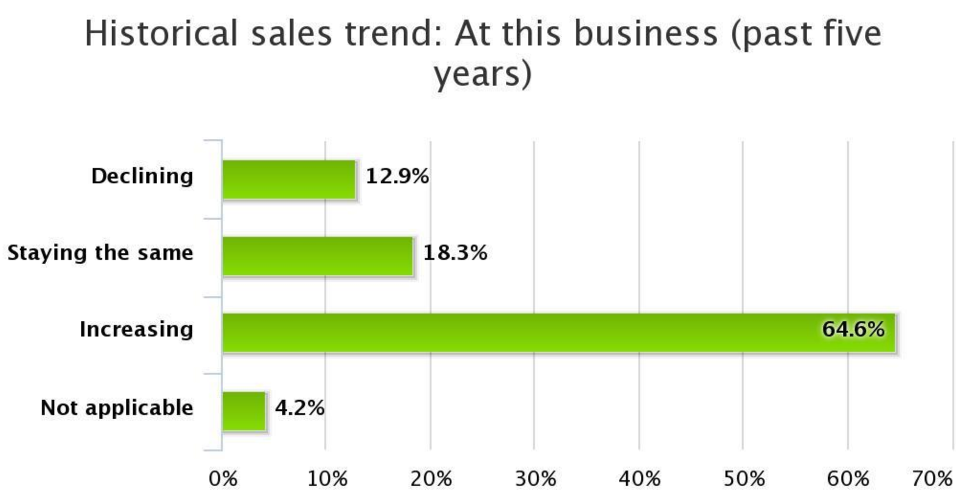
Figure 42: Projected sales growth in the next year



Note: 693 respondents

The majority of responses (65% or 462 businesses) indicated that sales at their business have increased over time, 18% (131 businesses) indicated that sales have remained relatively stable and 13% (92 businesses) reported that sales have declined.

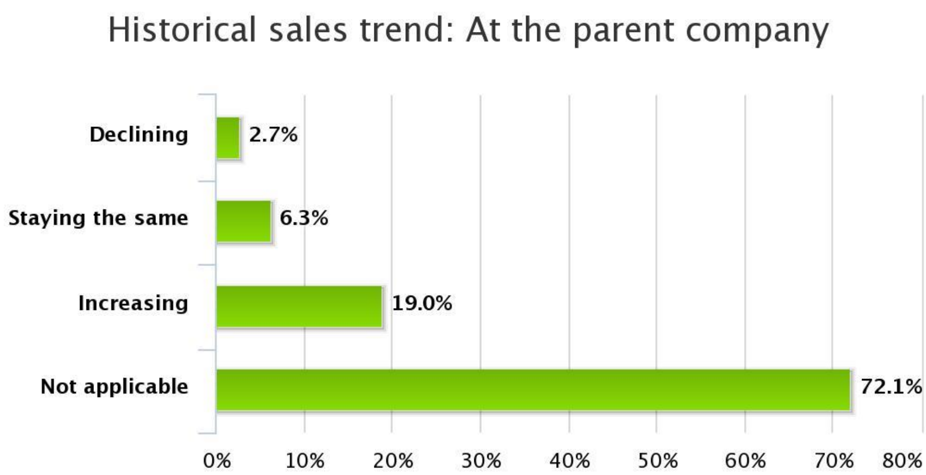
Figure 43: Historic sales trend at this location



Note: 715 respondents

Data indicates that the sales trend at parent companies is almost identical (68% increasing, 22% no change, 10% declining) after correcting for the high non-response rate (note that 72% of respondents indicate no parent company.

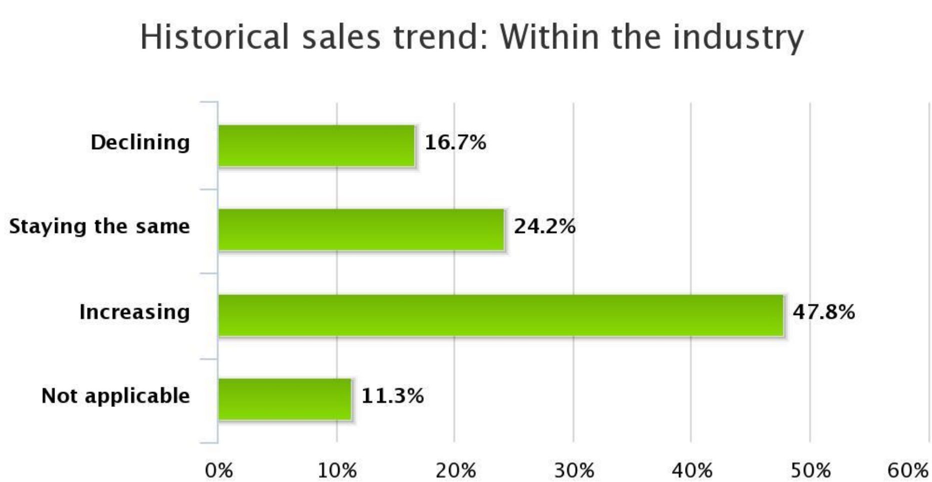
Figure 44: Historic sales trend at parent company



Note: 559 respondents

Data indicates that the sales trend within respondents' respective industries has followed similar trends, too. Again, after correcting for "not applicable" responses, the trends indicate 54% with increasing sales within industry, 27% stable, and 19% declining. The collection of figures 44 through 46 indicate that the blend of industries in the study area have been growing overall, while positions within respective industries is improving, but at a slower rate.

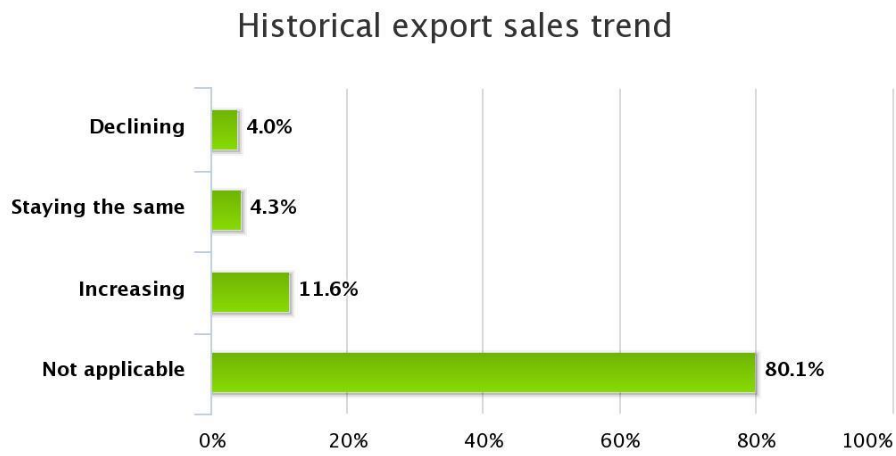
Figure 45: Historic sales trend within the industry



Note: 636 respondents

Again, after correcting for those businesses responding, “not applicable”, the sales trends in exporting businesses follow a very similar pattern with: 58% indicating increases, 22% reporting stability of sales, and 10% reporting a decline in exports.

Figure 46: Historical export sales trend

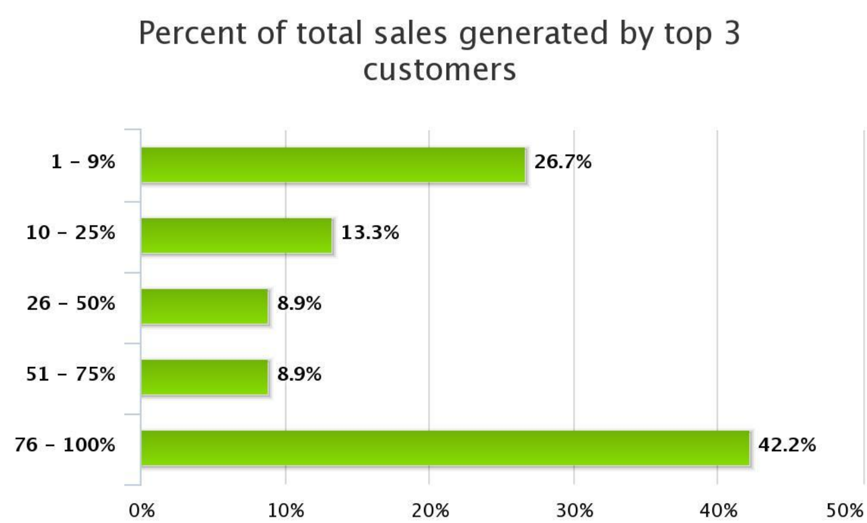


Note: 553 respondents

Source of Sales

The results of this particular question are subject to some under-sampling problems (not enough respondents for reliable results). The results reported below are only representative for a very limited geography.

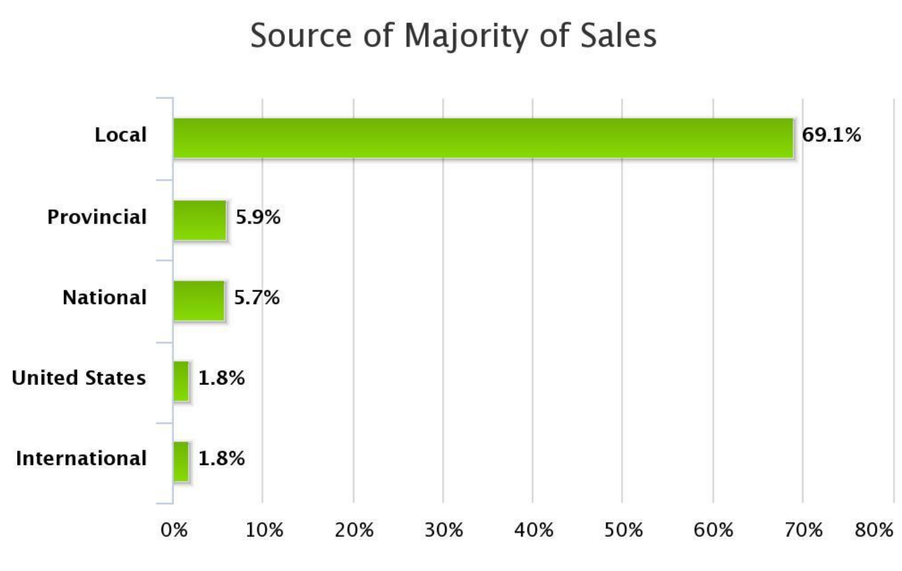
Figure 47: Sales generated by top 3 customers



Note: 45 respondents

A majority of respondents (69% or 505 businesses) indicated that over 50% of their sales are to customers within the community or region. 6% (or 43) indicated that over 50% of their sales are within the province. Fewer respondents (6%, 2%, 2%) indicated that the majority of their sales are to national, US or international markets, respectively.

Figure 48: Geographic source of majority of sales



Note: 47 respondents

77 respondents (12%) indicated that they import goods or services from other countries and 73 respondents (11%) indicated that they export goods or services to other countries. 81% of respondents did not respond to the question or stated they did not engage in international trade.

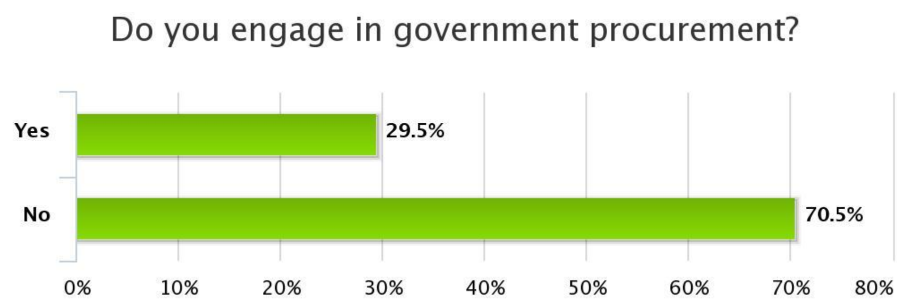
Figure 49: International trade status

Note: 667 respondents

Procurement

Of the 237 responses, only 30% indicated that they do engage in government procurement.

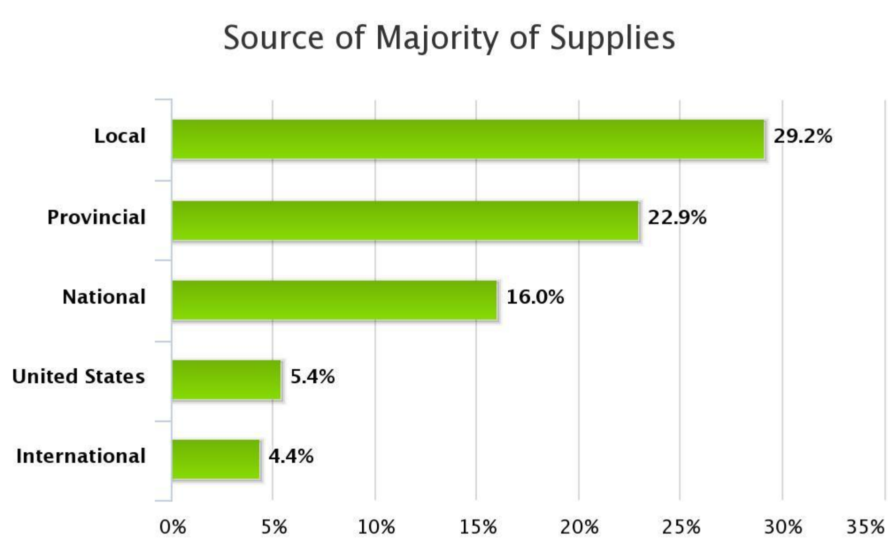
Figure 50: Engagement with government procurement processes



Note: 237 respondents

29% of respondents (206 businesses) interviewed reported that they purchase a majority of their supplies from local sources. 23% (162 businesses) indicated that the majority of their supplies come from businesses located within the province.

Figure 51: Geographic source of majority of supplies

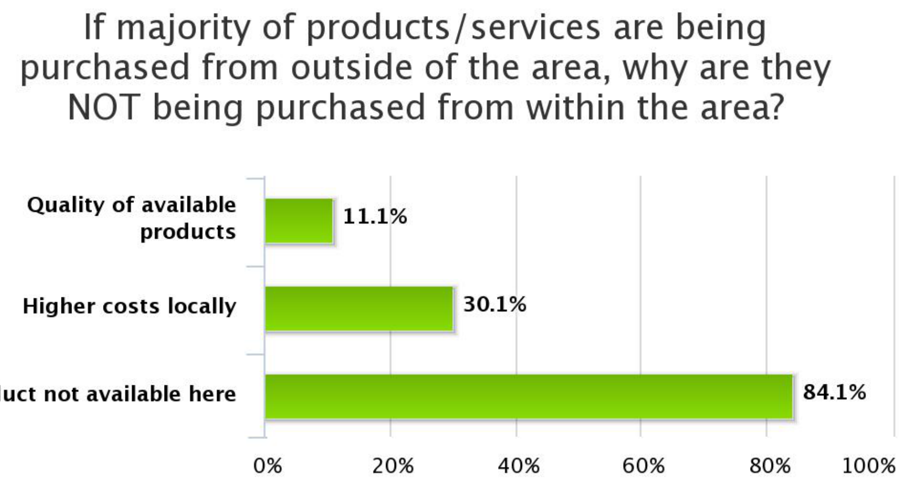


Note: 550 respondents

Purchasing

When reflecting on their reasons for purchasing products or services from out-of-area suppliers, the most common response (84% or 327 businesses) indicated that the products they need are not available locally. The next most cited reason is higher cost (30%) with quality of available products being the third most significant (11%). Other reasons included: head office decision, unaware of local vendors, existing long-term supply contracts, and loyalty to current supplier.

Figure 52: Reason for out-of-area purchasing



Note: 389 respondents

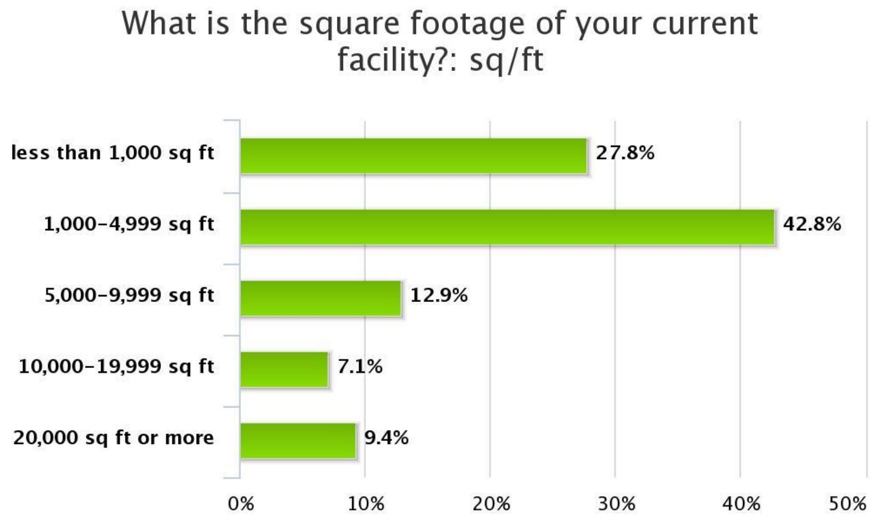
Products that businesses stated they would like to source from a local supplier include: computers and software, food goods (meat, dairy, fruits and veg), office supplies, construction materials, bedding and linens, auto parts and gardening supplies.

Facilities and Equipment

Size and Condition

43% (265 businesses) of respondents reported that their facility is between 1,000 and 4,999 square feet in size, and another 28% (172 businesses) indicated it was less than 1,000 square feet. The remaining 29% of respondents are located in larger facilities (13%: 5000' – 10000', 7%: 10000' – 20000', 9%: over 20000')

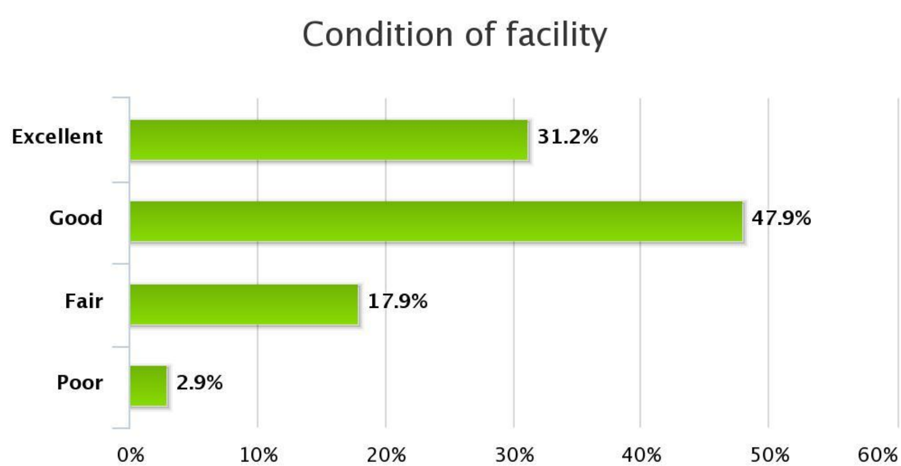
Figure 53: Size of facility



Note: 619 respondents

48% of respondents (327 businesses) indicated that their facility is in good condition. Another 31% (213 businesses) indicated that it is in excellent condition and 18% (122 businesses) reported that their facility is in fair condition. Only 3% (20 businesses) reported that their facility was in poor condition.

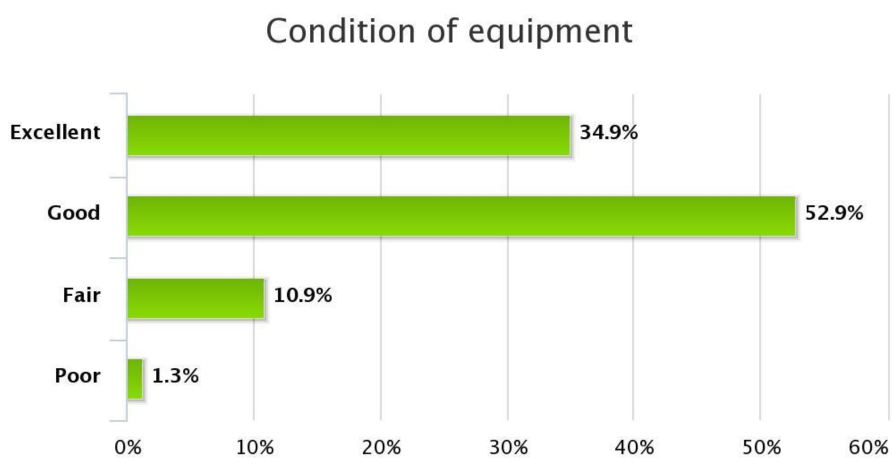
Figure 54: Condition of facility



Note: 682 respondents

35% (238 businesses) of respondents indicated that their equipment is in excellent condition. 53% (360 businesses) indicated that it is in good condition and 11% (74 businesses) report their equipment is in fair condition.

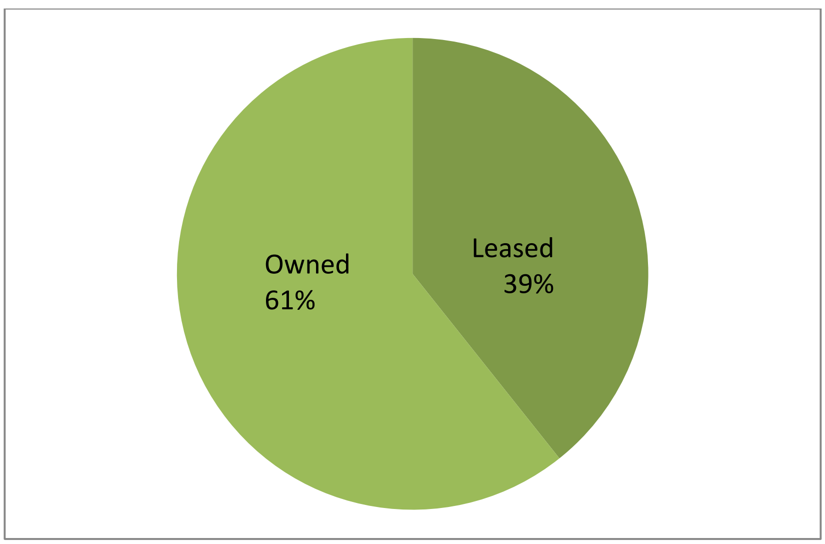
Figure 55: Condition of equipment



Note: 681 respondents

Ownership

Figure 56: Ownership status of facility

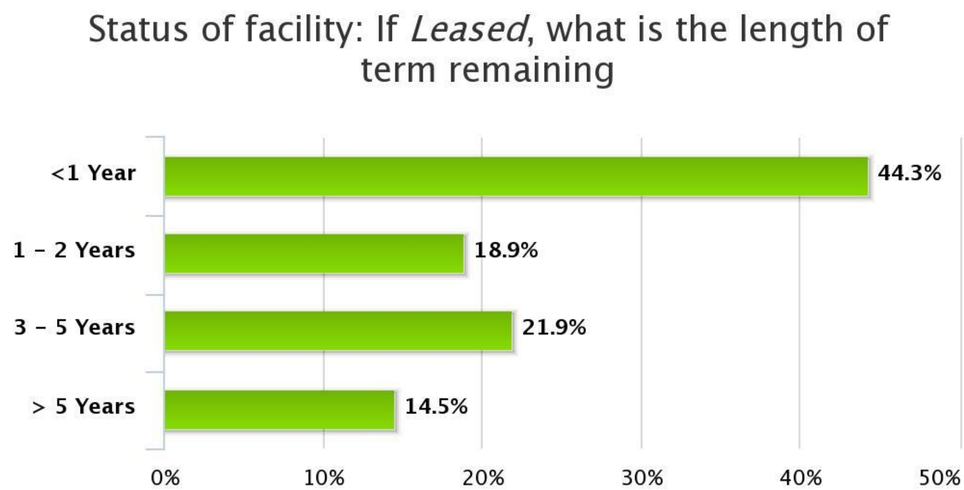


61% of respondents (448 businesses) own the facility in which they operate and 39% (290 businesses) lease it.

Note: 738 respondents

Of the 290 businesses that lease their facility, 44% have less than a year remaining on their lease, 19% have between one and two years, and 22% have between 3 and 5 years remaining. The majority of respondents that lease their facility (83% or 251 businesses) intend to renew their current lease agreement.

Figure 57: Length of time remaining on lease

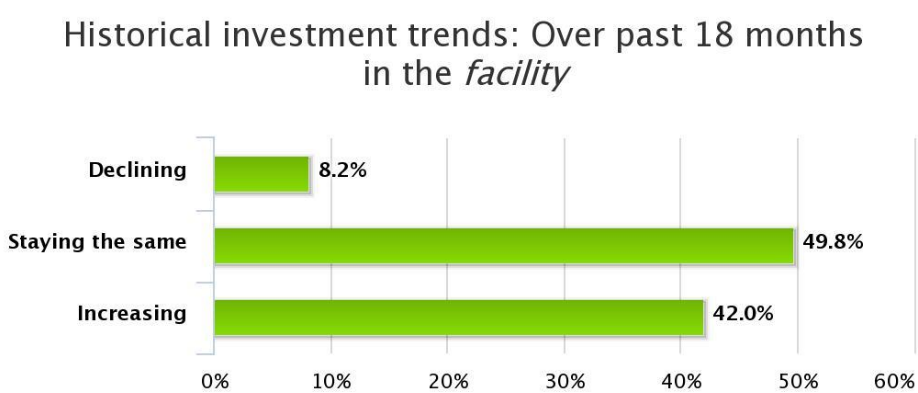


Note: 290 respondents

Investment and Expansion

42% of respondents (252 businesses) indicated that their company's investment in their facility has increased over the past 18 months, while just 8% or 49 businesses, indicated that the investment has declined. Almost 50% of businesses (299) indicated that investment in their facility has remained constant.

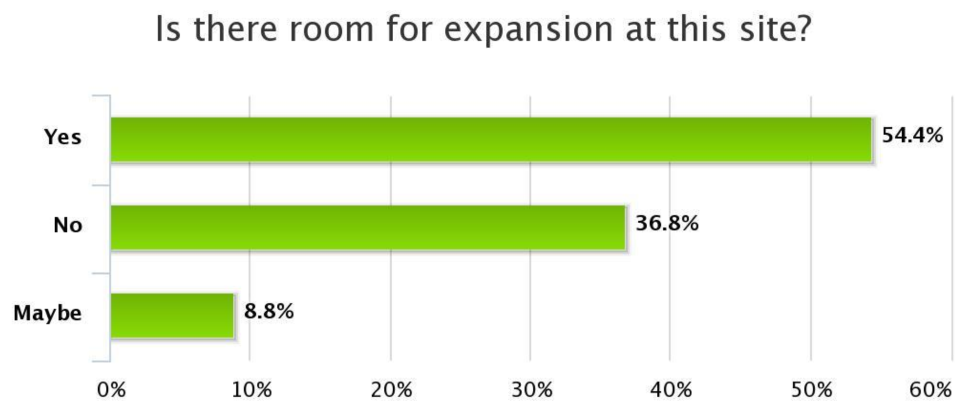
Figure 58: Historical Investment in facility (past 18 months)



Note: 600 respondents

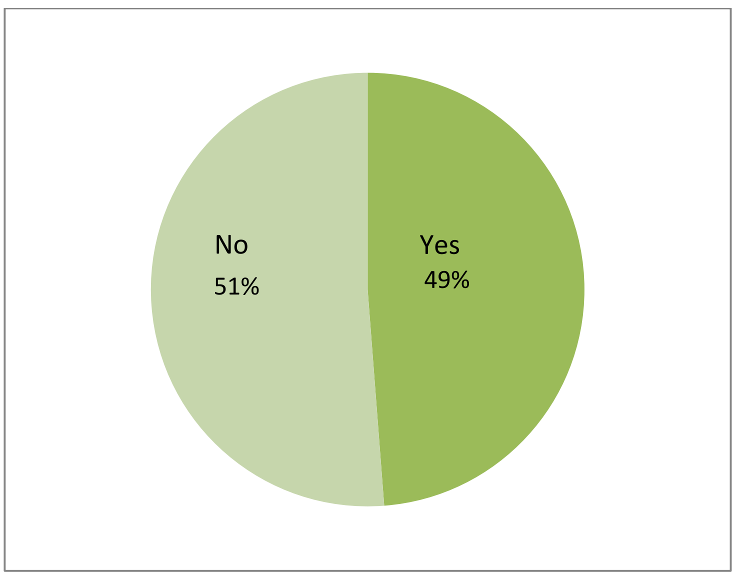
54% of respondents (358 businesses) indicated that there *was* room for expansion at their site, 37% (242 businesses) said that there *was not* room at their site. The remainder were unsure.

Figure 59: Room for expansion



Note: 658 respondents

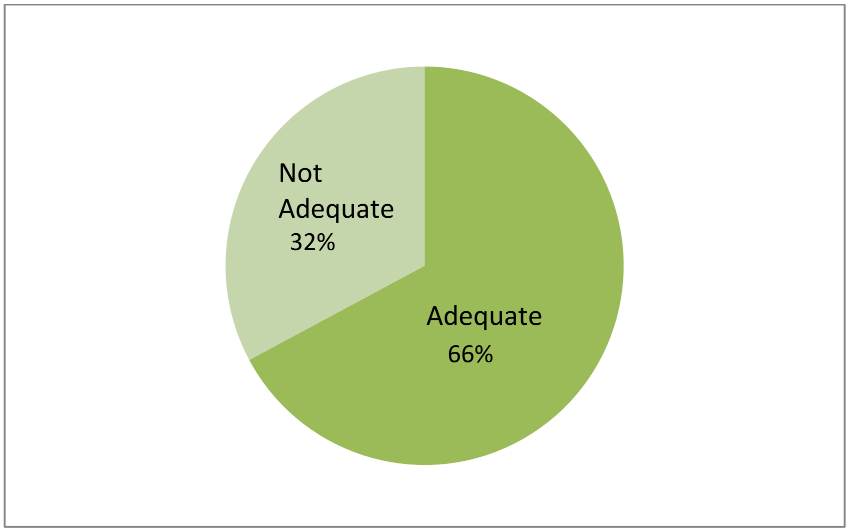
Figure 60: Plans to expand within three years



49% of respondents (361 businesses) plan to expand within three years, 51% (379 businesses) do not.

Note: 740 respondents

Figure 61: Adequacy of current site to support expansion

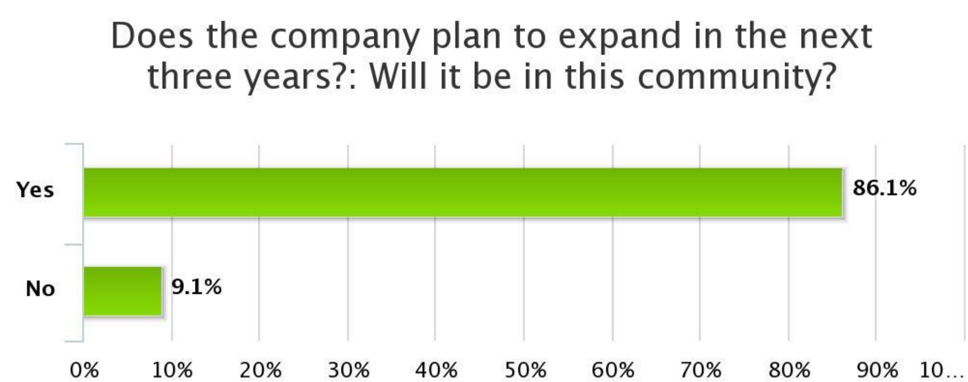


Of the businesses planning expansion, 66% (227 businesses) reported that their current site will be adequate. Notably however, 111 businesses (32%) reported that they will have to look for a new site to meet their planned expansion needs.

Note: 338 respondents

Most respondents (86% or 304 businesses) indicated that expansion will occur within the community.

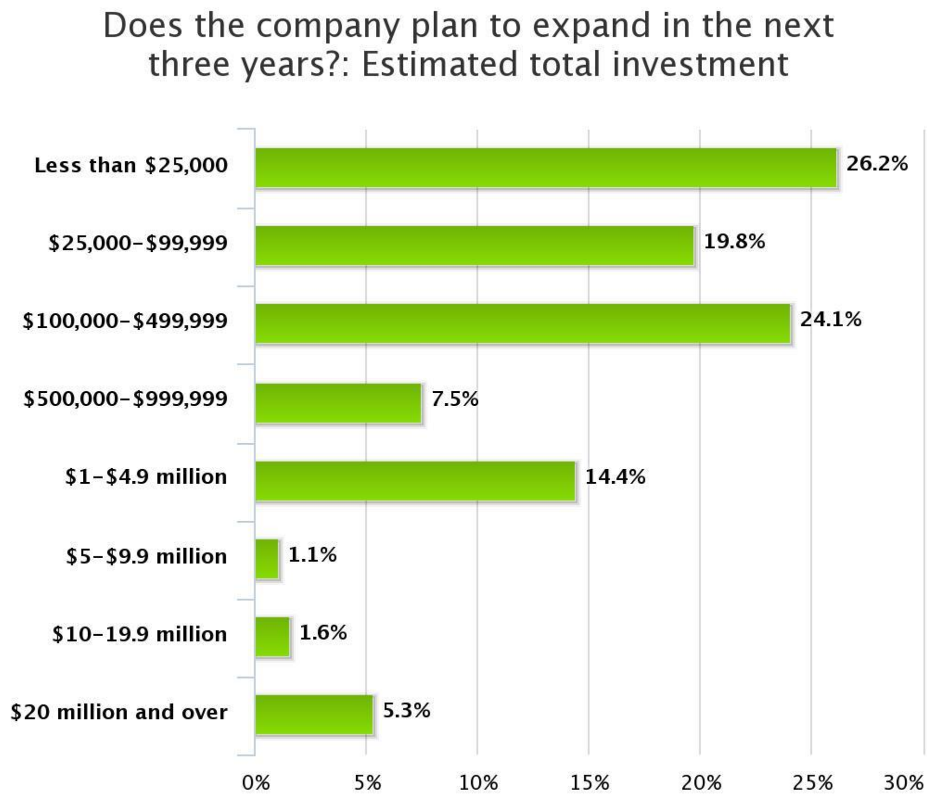
Figure 62: Expansion to occur in community



Note: 336 respondents

As detailed in figure 63, below, 187 of the 361 businesses planning expansion identified the approximate amounts they plan to spend on expansion related investments. A rough estimate of the total planned investment amounts to almost $420M for the region.

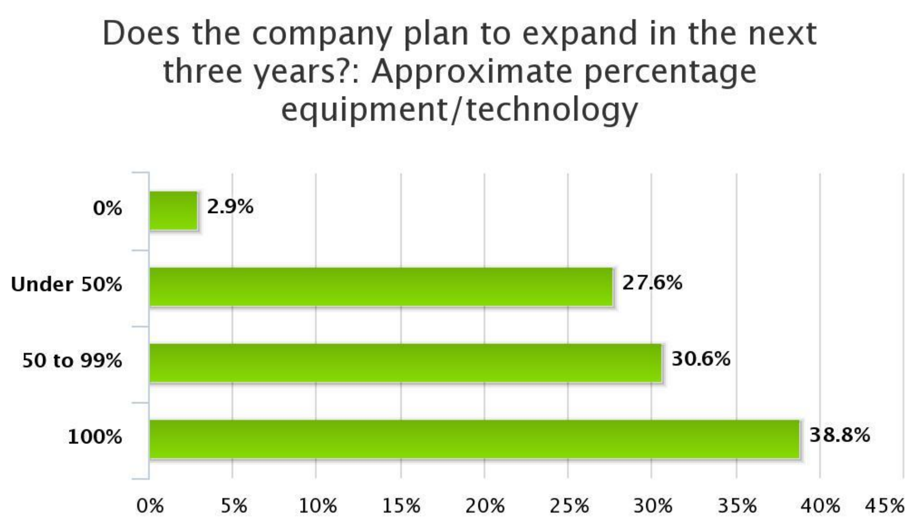
Figure 63: Estimated expansion investment



Note: 187 respondents

As detailed in figure 64, below, of the 361 businesses planning expansion, 170 responded to questions about their planned spending on equipment and technology. Of these, 66 (39%) responded that they expect to spend 100% of their expansion budget on equipment and technology. 31% (52 businesses) plan to spend over half, 28% (47 businesses) will spend less than half and 3% (5 businesses) will spend nothing.

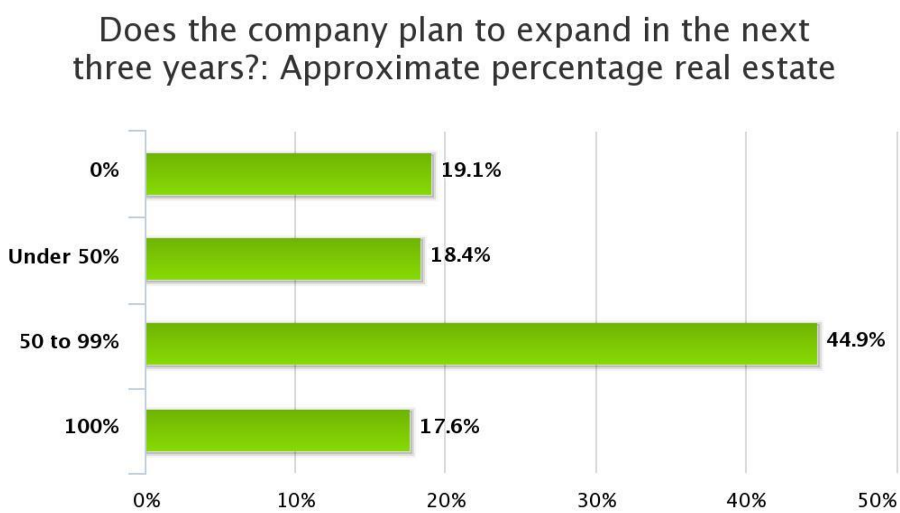
Figure 64: Component of expansion budget for equipment and technology



Note: 170 respondents

As detailed in figure 65, below, of the 361 businesses planning expansion, 136 responded to questions about their planned spending on real estate. Of these, 24 (18%) responded that they expect to spend 100% of their expansion budget on real estate. 45% (61 businesses) plan to spend over half, 18% (25 businesses) will spend less than half and 19% (26 businesses) will spend nothing.

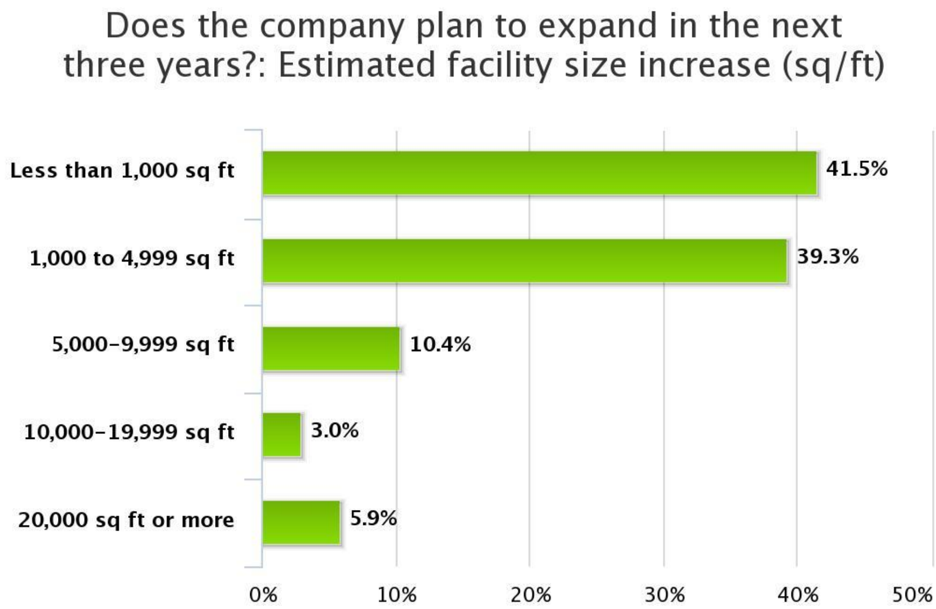
Figure 65: Component of expansion budget for real estate



Note: 136 respondents

Of the businesses planning expansion 135 gave details on their planned facility expansion. Eight respondents (6%) indicated that they expect the size of their facility expansion will be 20,000 square feet or greater. Four businesses reported (3%) their expansion would be between 10,000 and 19,999 square feet, 14 businesses (10%) reported between 5000 and 9999 square feet, 53 businesses (39%) reported between 1000 and 4999 square feet and 56 businesses (41%) under 1000 square feet.

Figure 66: Size of facility expansion

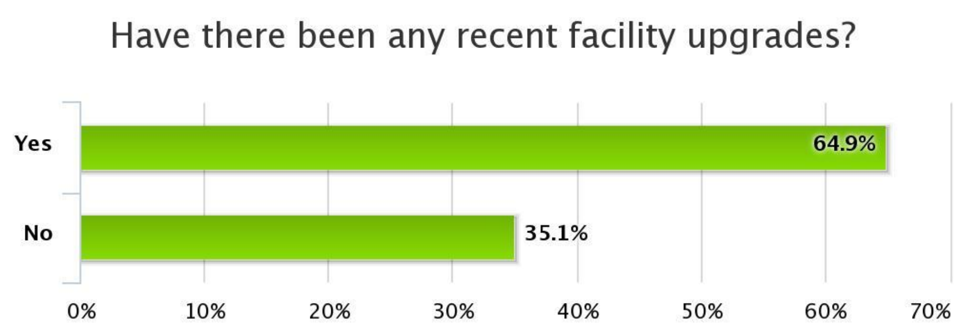


Note: 135 respondents

Facility Upgrades

65% of businesses (100 businesses) indicated that there had been recent facility upgrades. Of those 100 businesses, 58% indicated that those upgrades were completed in the last 12 months.

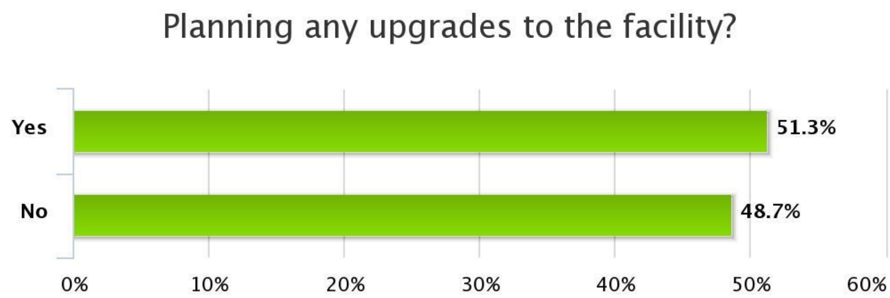
Figure 67: Recent facility upgrades



Note: 154 respondents

51% (77 businesses) indicated that they are planning facility upgrades, and that the marjority (83% or 59 businesses) of those planning upgrades will occur in the next 12 months. Respondents were also asked to identify any barriers to upgrading. There were no discernible trends to the barriers.

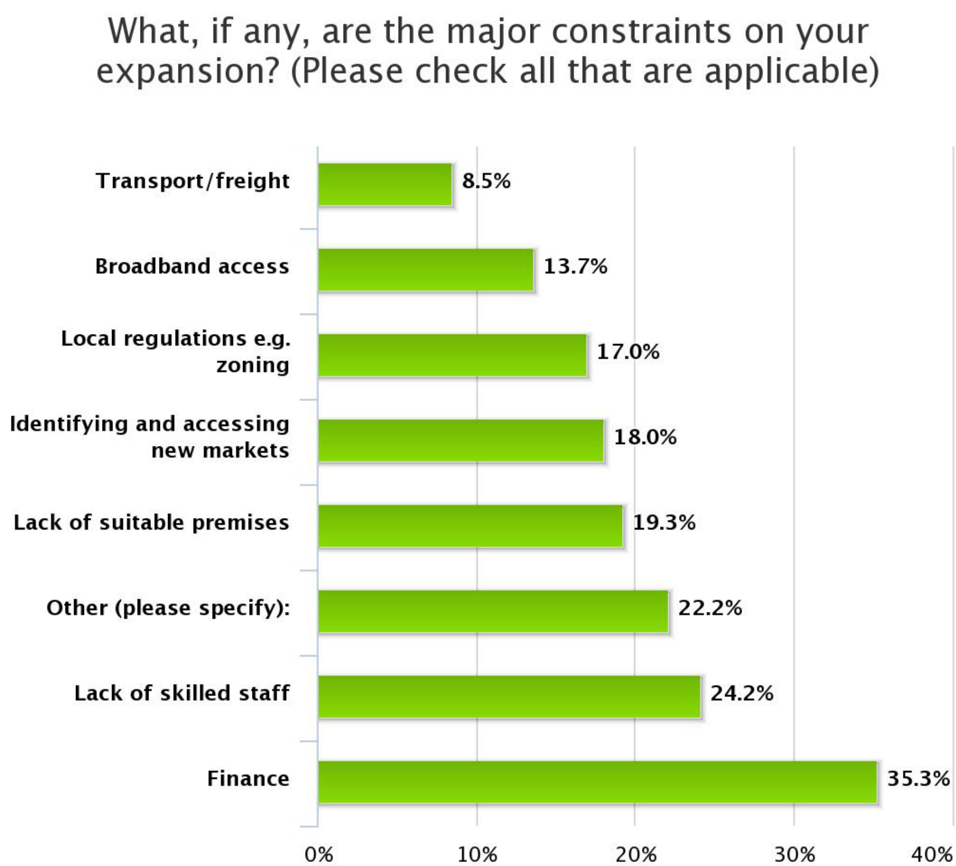
Figure 68: Planning facility upgrades



Note: 150 respondents

Respondents cited a variety of factors that act as barriers to expansion. Most common of those was finance (35% or 137 businesses), and a lack of skilled staff (24% or 94 businesses). Suitable premises, market access, local regulation, access to broadband internet and transportation were also significant.

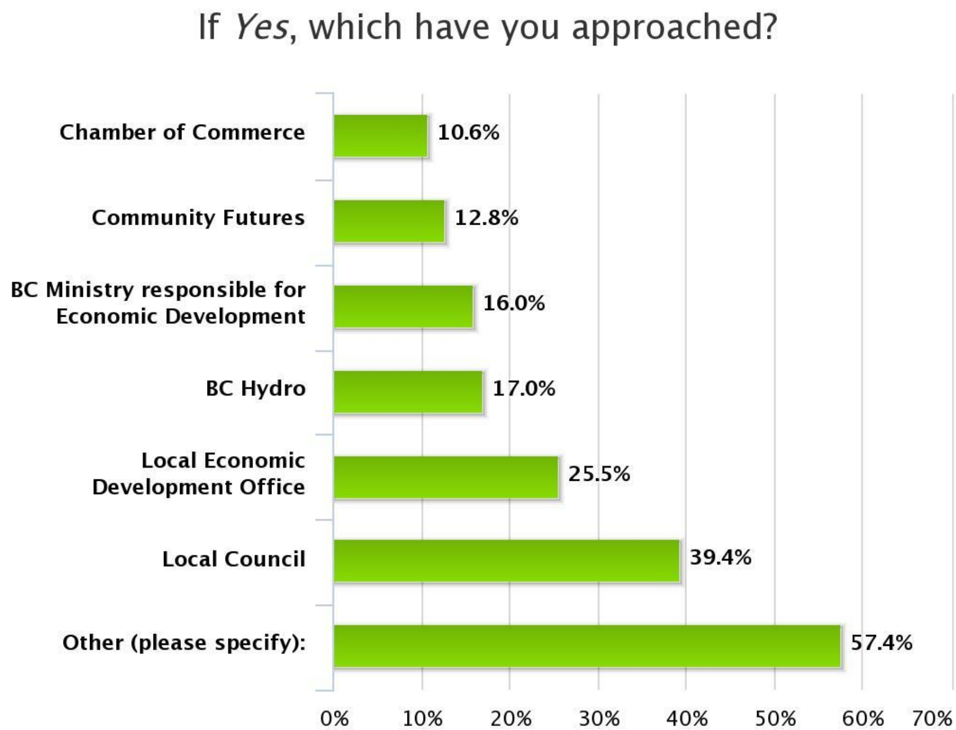
Figure 69: Barriers to expansion



Note: 737 respondents

28% of respondents (104 businesses) indicated that they have sought assistance with their expansion efforts from an external organization. Of those businesses, most (39% or 37 businesses) had approached their local government offices, 25% (24 businesses) had approached their local Economic Development office, 17% (16 businesses) approached BC Hydro, 16% (15 businesses) approached the provincial ED ministry, 13% (12 businesses) approached Community Futures, and 11% (10 businesses) approached the local Chamber of Commerce. The 'Other' responses show no strong trending responses (see appendix for details).

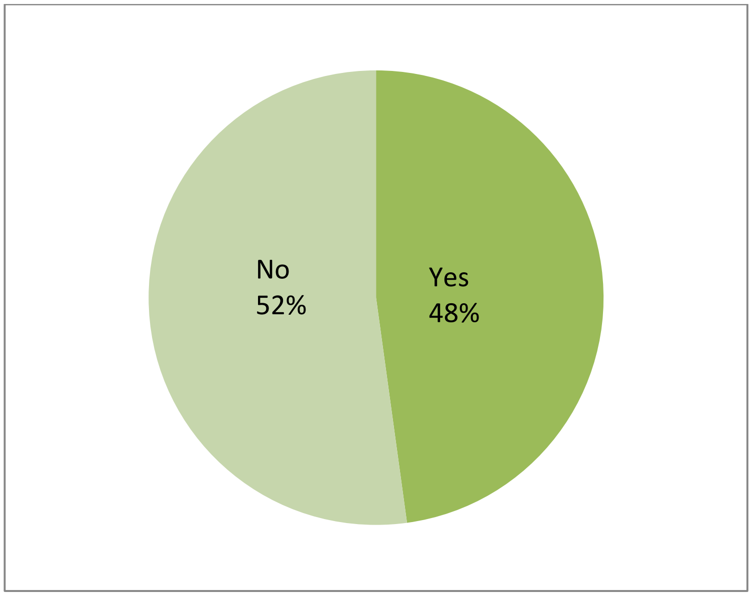
Figure 70: Organizations approached for expansion assistance



Note: 168 respondents

Energy Efficiency

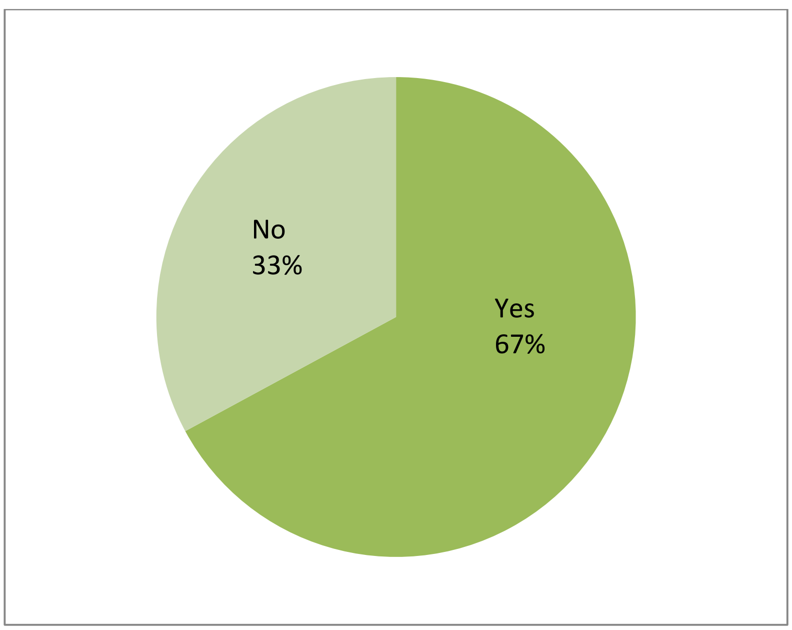
Figure 71: Considering energy efficiency in expansion plans



48% of those who responded (13 businesses) are considering energy efficiency in their expansion plans.

Note: 161 respondents

Figure 72: Awareness of BC Hydro Power Smart



67% of respondents (459 businesses) are familiar with the energy efficiency support available through the BC Hydro Power Smart program.

ote: 684 respondents

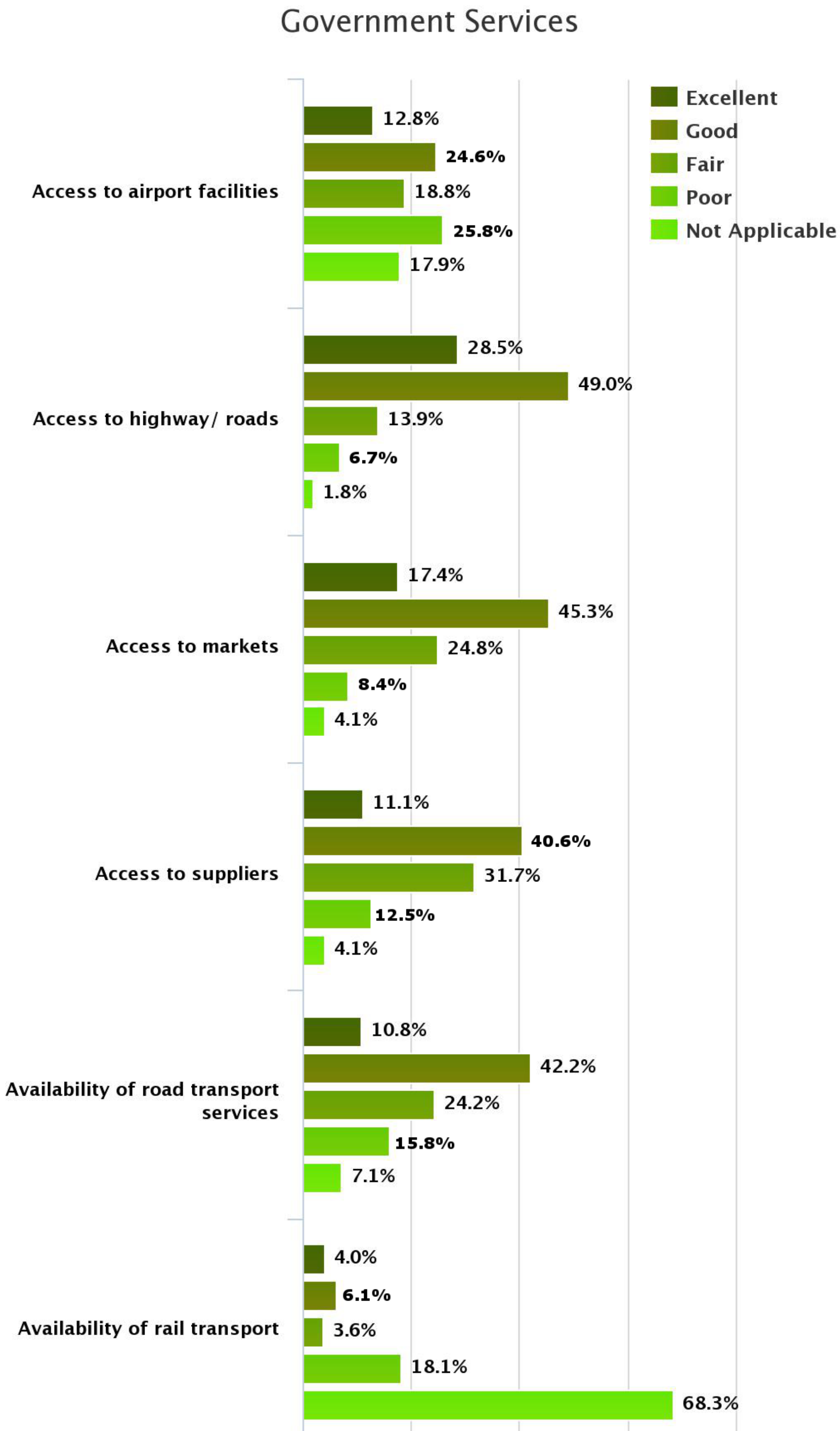
GOVERNMENT SERVICES[12]

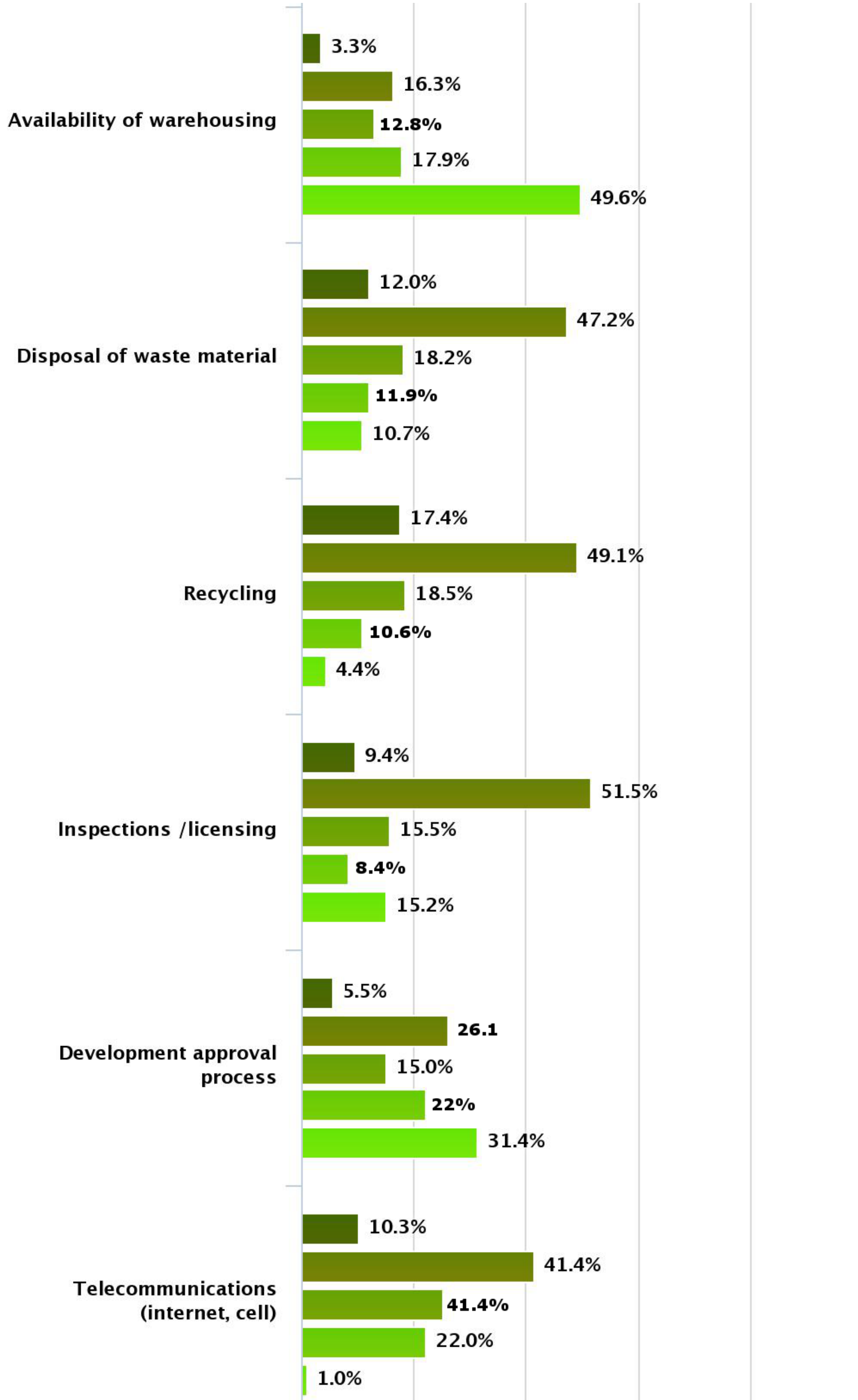
Respondents were asked to rate a list of government services as poor, fair, good or excellent. Respondents also had the option to rate a service as not applicable to their business.

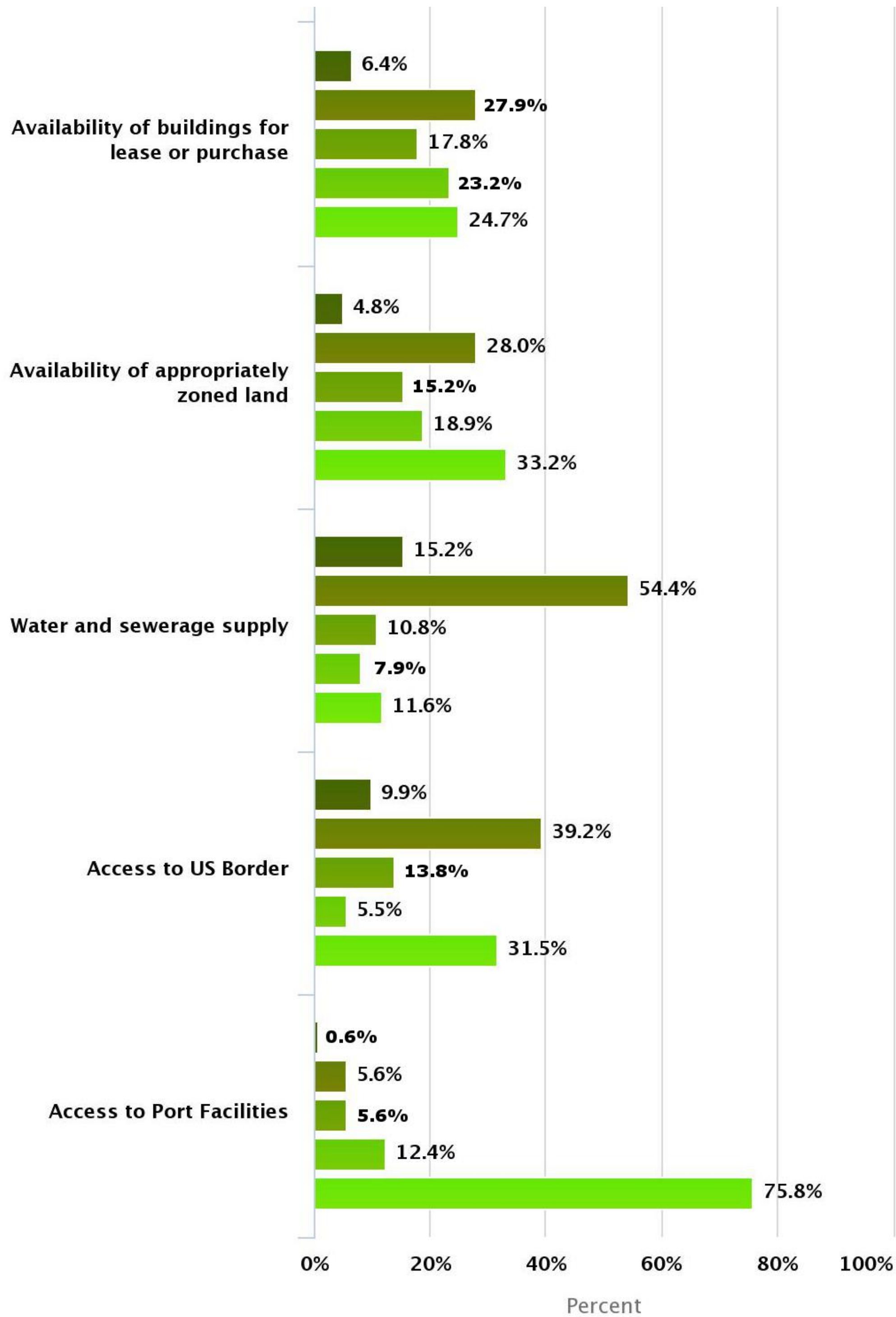
- The services that received the highest number of **POOR** ratings were:
    - Access to airports (27% or 215 businesses),
    - Telecommunications (19% or 148 businesses), and
    - Availability of buildings for lease or purchase (17% or 133 businesses).
- The services that received the highest number of **FAIR** ratings were:
    - Access to Suppliers (31% or 20 businesses),
    - Telecommunications (21% or 170 businesses), and
    - Access to markets (21% or 165 businesses).
- The services that received the highest number of **GOOD** ratings were:
    - Access to highways/roads (44% or 349 businesses),
    - Water and sewerage (42% or 332 businesses), and
    - Recycling (41% or 324 businesses).
- The services that received the highest number of **EXCELLENT** ratings were:
    - Access to highways/roads (26% or 203 businesses),
    - Access to markets (15% or 116 businesses), and
    - Recycling (14% or 115 businesses).
- The services that the highest number of respondents felt are **NOT APPLICABLE** to their business were:
    - Availability of rail transport (41% or 325 businesses),
    - Availability of warehousing (32% or 252 businesses), and
    - Availability of appropriately zoned land (23% or 181 businesses).

[12] This is a loose definition of services provided by all levels of governments and, occasionally, by private industry. But, these generally fall into the infrastructure category.

Figure 73: Rating of government services




Availability of warehousing
3.3%
16.3%
12.8%
17.9%
49.6%
Disposal of waste material
12.0%
47.2%
18.2%
11.9%
10.7%
Recycling
17.4%
49.1%
18.5%
10.6%
4.4%
Inspections /licensing
9.4%
51.5%
15.5%
8.4%
15.2%
Development approval process
5.5%
26.1
15.0%
22%
31.4%
Telecommunications (internet, cell)
10.3%
41.4%
41.4%
22.0%
1.0%



Note: 161-712 respondents

When asked whether there were any suggestions on how to improve any of the services and infrastructure, 67% respondents (472 businesses) indicated they had suggestions. The highest number of responses (29% or 137 businesses) discussed improvements to telecommunications and expanded broadband and cell service. Improvements to the airport services were also referenced by 12% (58 businesses) of respondents. Improvements to highway and roadway quality and servicing was referenced by 12% of respondents (56 businesses).

Figure 74: Suggested improvements to government services: Key words

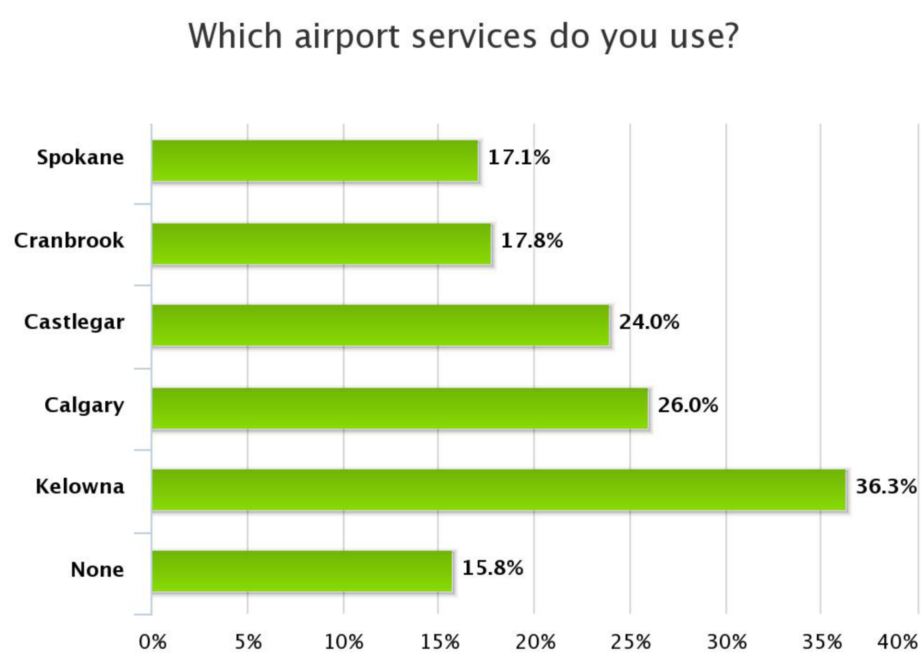
"Need a community liaison officer to communicate with local businesses"

"There should be more promotion of commercial buildings that are available."

Airport Service

As detailed in figure 75, below, the Kelowna International Airport is the most used airport, with 36% of respondents (53 businesses) indicating they use that airport. The Calgary International Airport was second most used with 26% (38 businesses), and the Castlegar Airport being used by 24% of respondents (35 businesses).

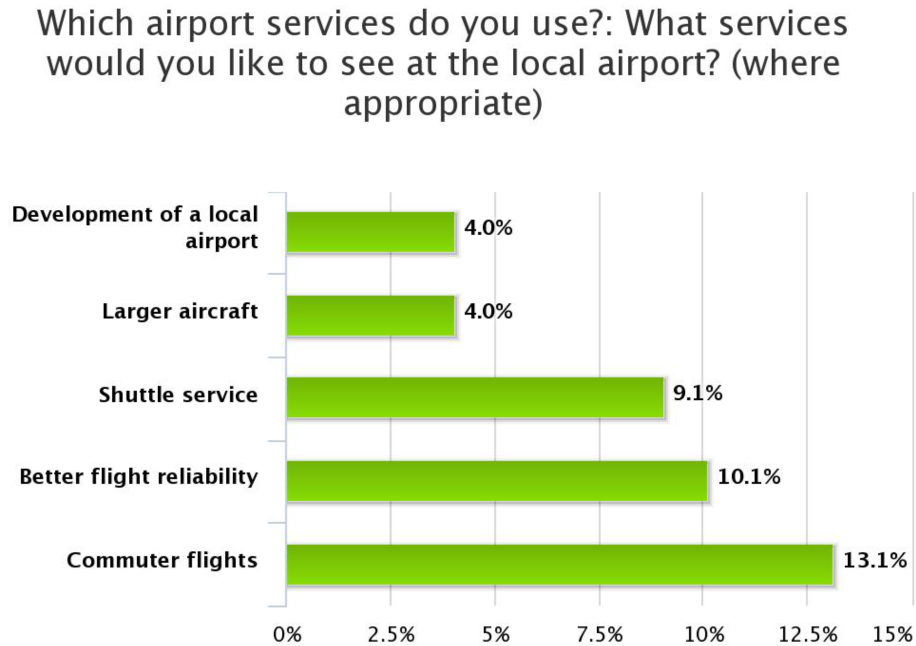
Figure 75: Airport service used



Note: 235 respondents

Respondents indicated that they would most like to see commuter flights (13% or 7 businesses), with 10% of respondents (10 business) indicating a desire for better flight reliability, 9% (9 businesses) asking for shuttle service and 4% (4 businesses) recommending larger planes.

Figure 76: New services at local airport (Canadian Rockies International Airport)



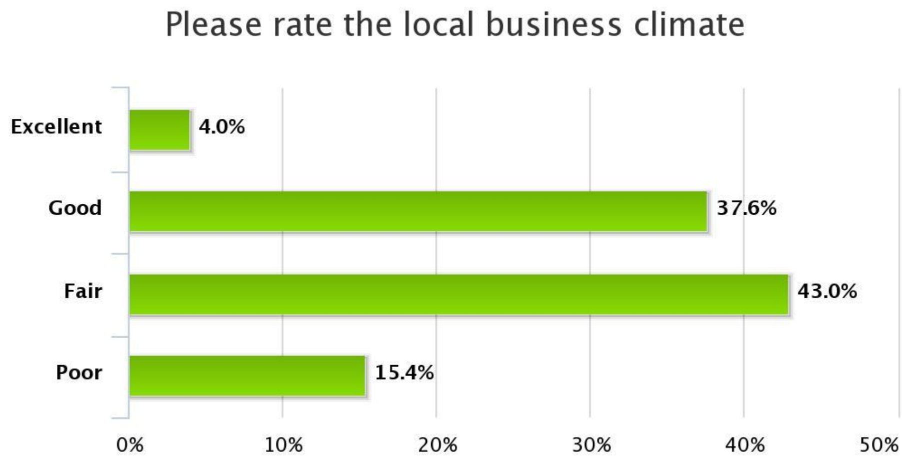
Note: 74 respondents

Business Climate

Quality of Business Climate

The majority of responses rated the overall business climate as fair (43% or 323 businesses).

Figure 77: Rating of local business climate

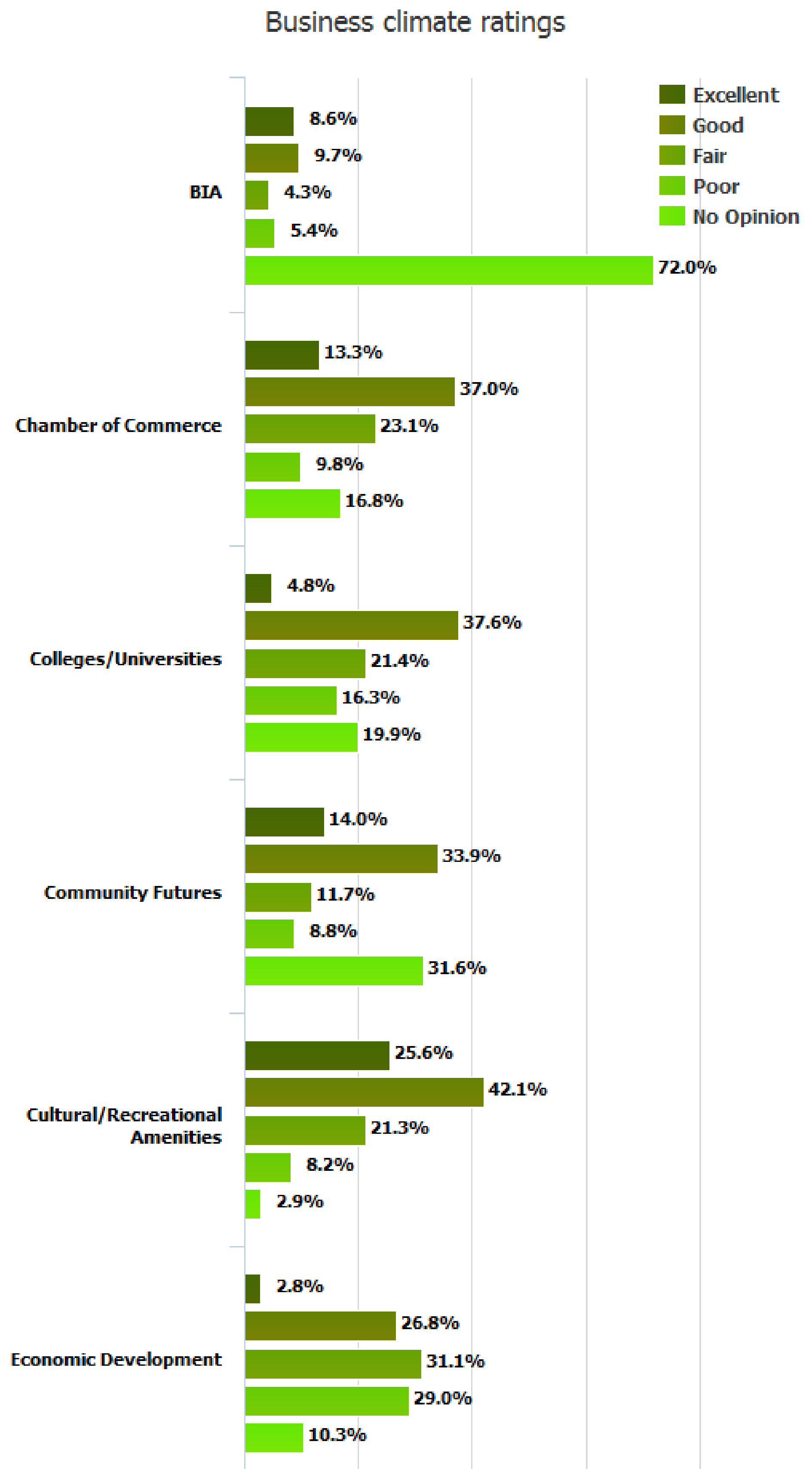


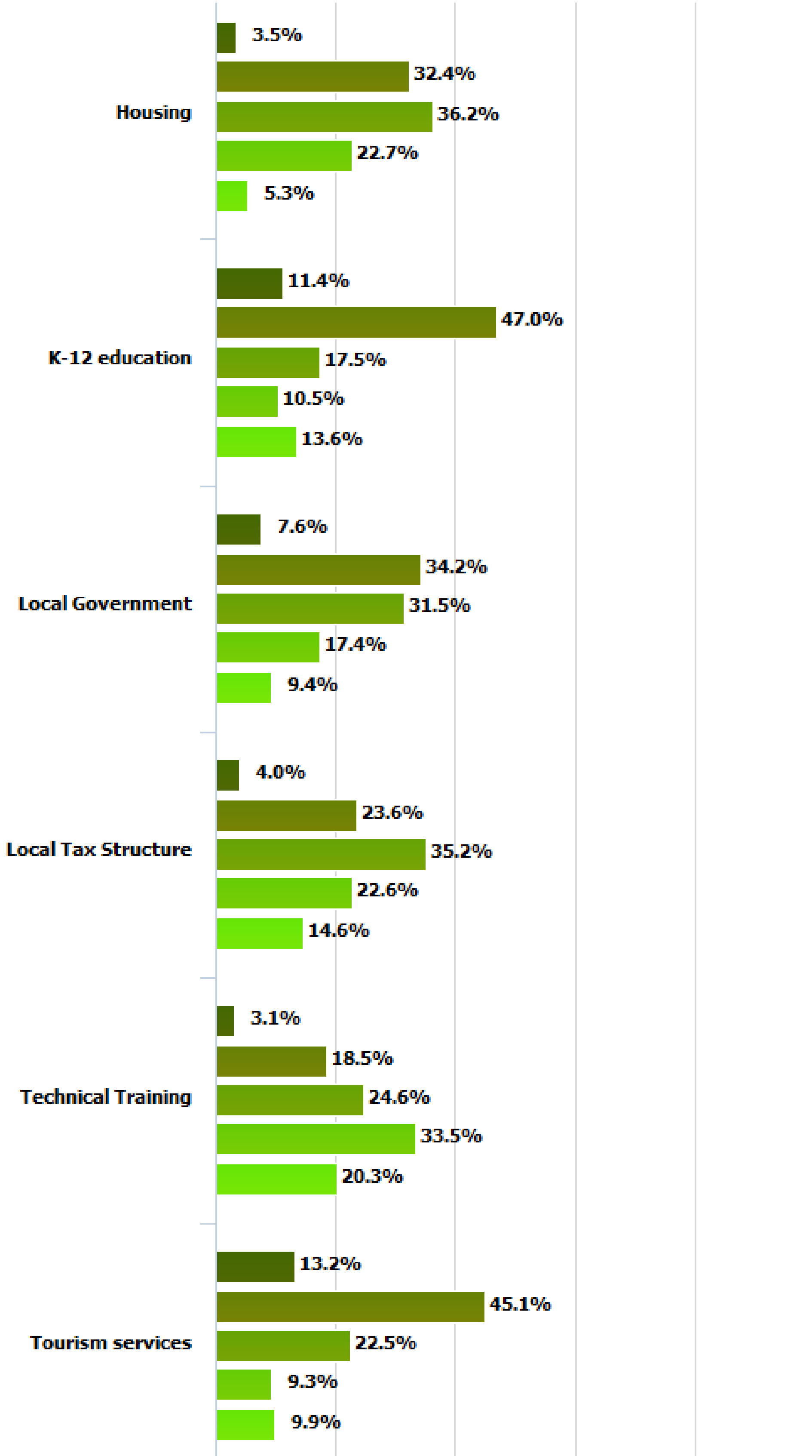
Note: 752 respondents

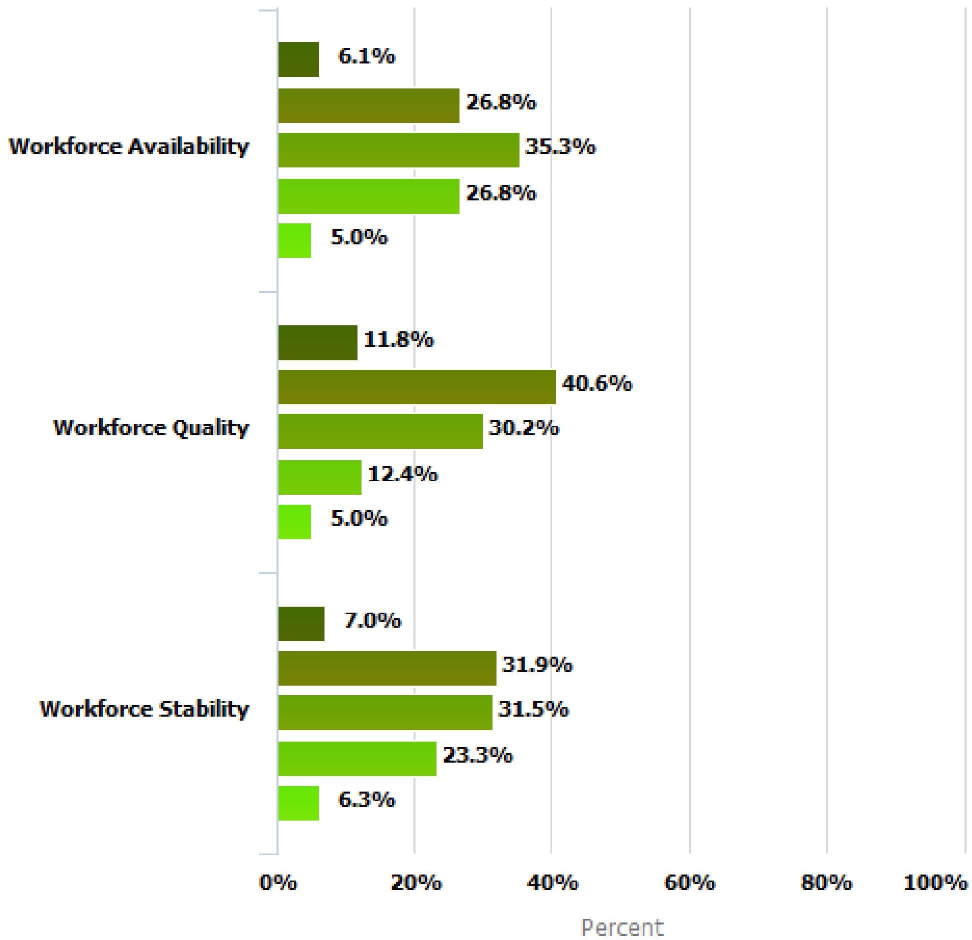
Respondents were asked to rate the quality of a list of specific business climate factors as either poor, fair, good, excellent or not applicable to their business.

- The factors that received the highest number of **POOR** ratings included:
  - Technical training (29% / 230 businesses),
  - Economic development (26% or 208 businesses), and
  - Workforce availability (24% / 192 businesses).
- The factors that received the highest number of **FAIR** ratings included:
  - Housing (33% / 260 businesses),
  - Workforce availability (32% or 253 businesses), and
  - Local tax structure (31% / 249 businesses).
- The factors that received the highest number of **GOOD** ratings included:
  - K-12 education (42% / 335 businesses),
  - Cultural and recreational opportunities (38% or 303 businesses), and
  - Colleges and universities (33% / 265 businesses).
- The factors that received the highest number of **EXCELLENT** ratings included:
  - Cultural and recreational opportunities (23% / 184 businesses),
  - Workforce quality (11% or 85 businesses), and
  - K-12 education (10% / 81 businesses).
- The factors that received the highest number of **NO OPINION** ratings include:
  - Colleges and universities (18% / 140 businesses),
  - Technical training (17% or 139 businesses), and
  - Local tax structure (13% / 103 businesses).

Figure 78: Rating of business climate factors



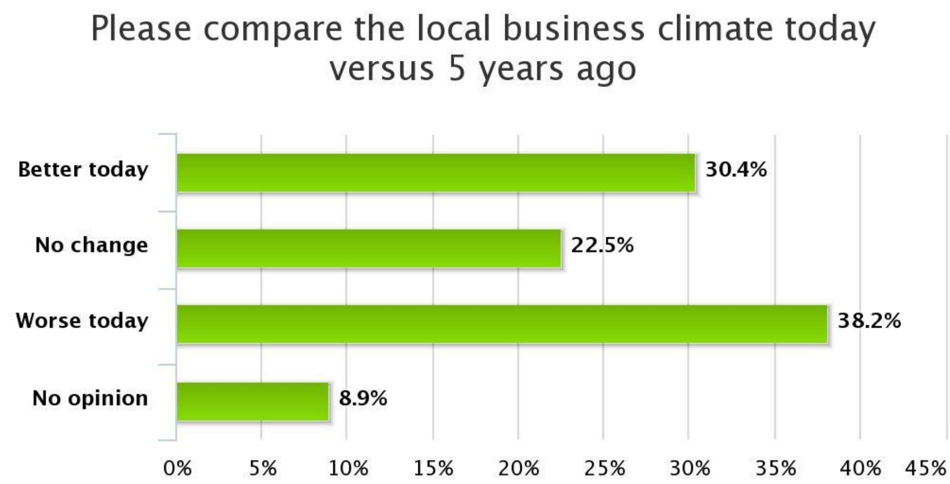

Housing
3.5%
32.4%
36.2%
22.7%
5.3%
K-12 education
11.4%
47.0%
17.5%
10.5%
13.6%
Local Government
7.6%
34.2%
31.5%
17.4%
9.4%
Local Tax Structure
4.0%
23.6%
35.2%
22.6%
14.6%
Technical Training
3.1%
18.5%
24.6%
33.5%
20.3%
Tourism services
13.2%
45.1%
22.5%
9.3%
9.9%



Note: 93-719 respondents

30% of respondents (221 businesses) felt that the business climate is better today than it was 5 years ago. 38% (278 businesses) thought that it is worse, and 23% (164 businesses) believed there was no change in the business climate.

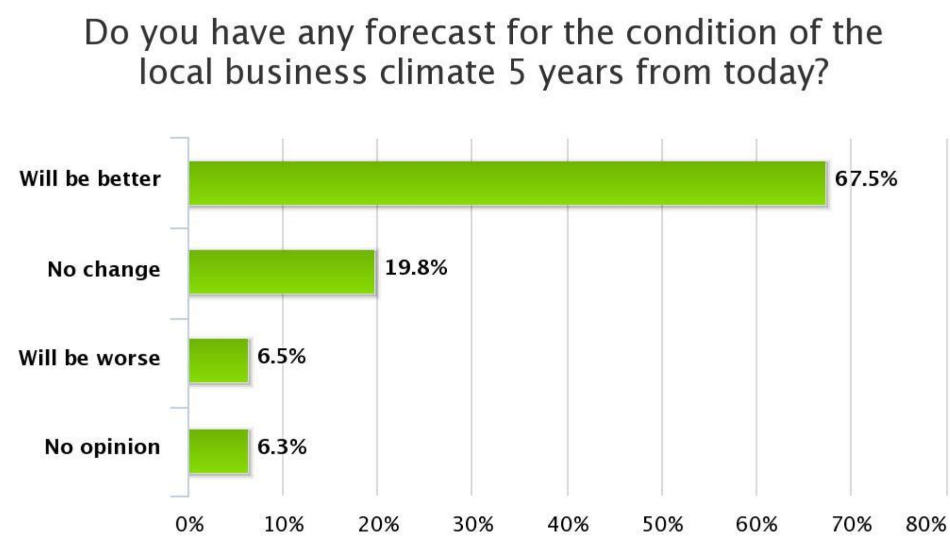
Figure 79: Business climate today vs. 5 years ago



Note: 728 respondents

67% of respondents (502 businesses) expect that the business climate will be better 5 years from today. 7% (48 businesses) expect that it will be worse.

Figure 80: Business climate 5 years from today

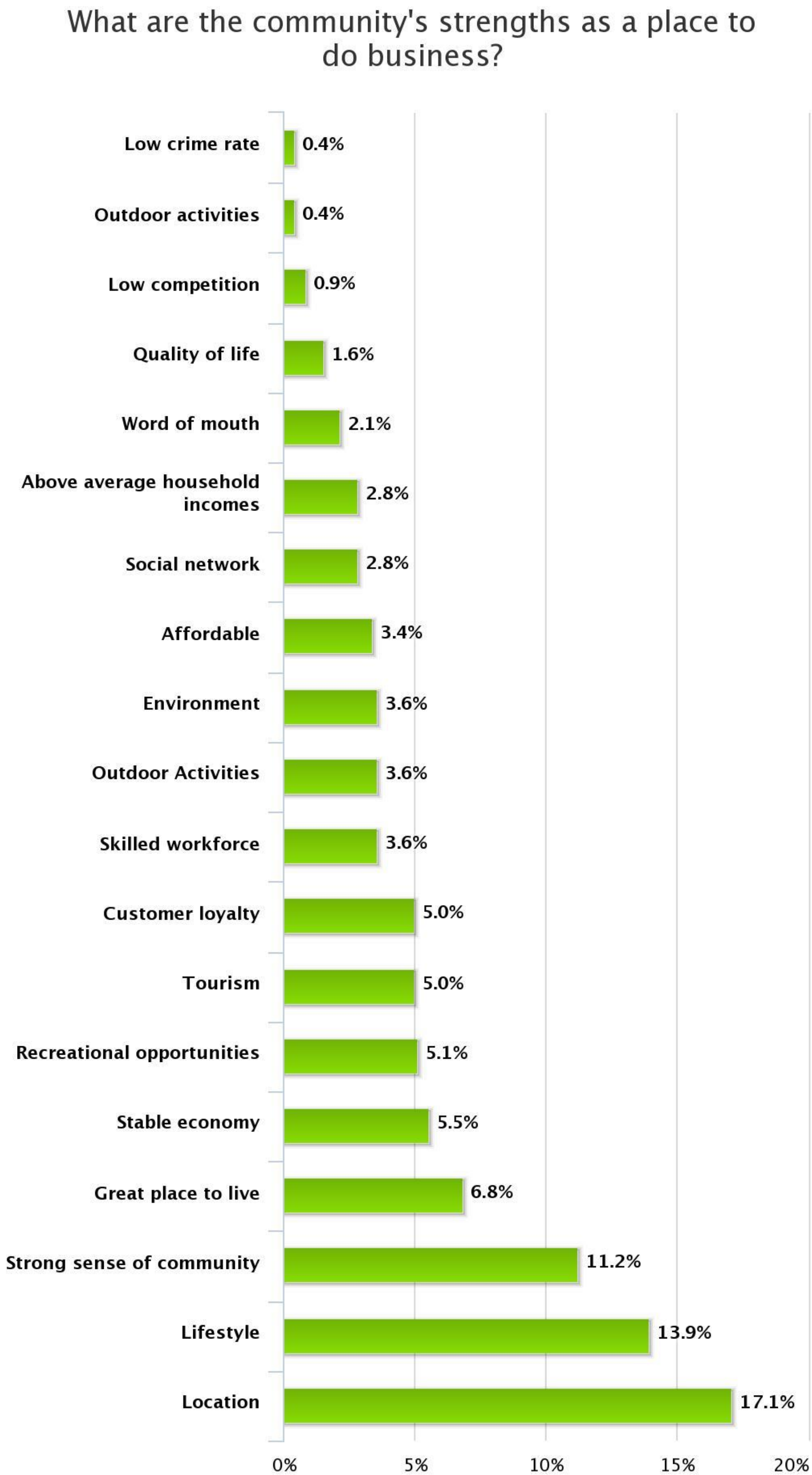


Note: 744 respondents

Strengths and Weaknesses of Business Climate

Asked to list the community's strengths as a place to do business, the highest number of responses (17% or 120 responses) cited location as the community's strength. 14% (98 businesses) indicated lifestyle, and 11% (79 businesses) indicated the strong sense of community was a factor in the community's strength as a place to do business.

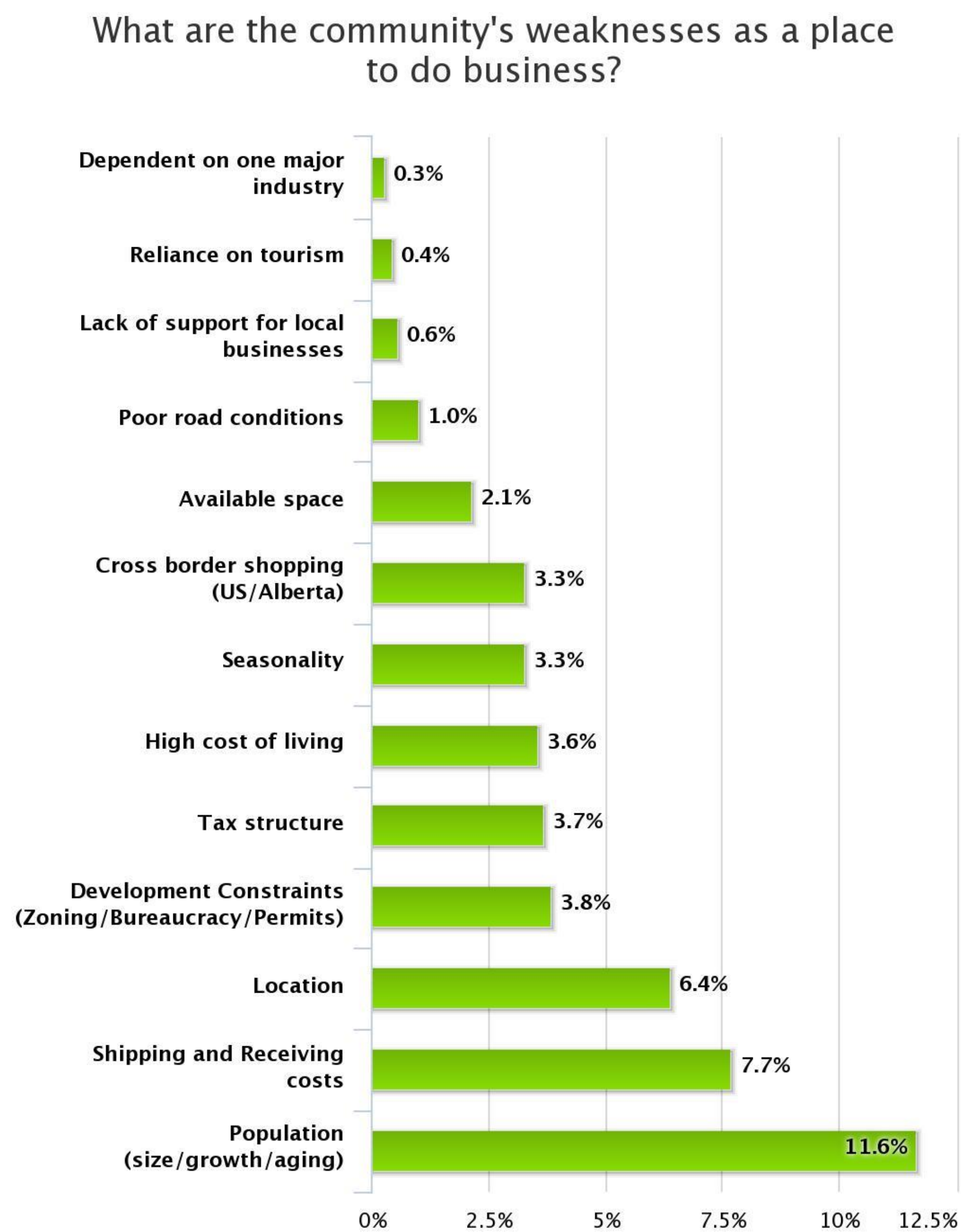
Figure 81: Community's strengths as a place to do business



Note: 667 respondents

Asked to list the community's weaknesses as a place to do business, the highest number of responses (12% or 82 respondents) related to limited population. Shipping and receiving costs accounted for 8% of responses (54 businesses), while location was cited by 6% (45 businesses).

Figure 82: Community's weaknesses as a place to do business

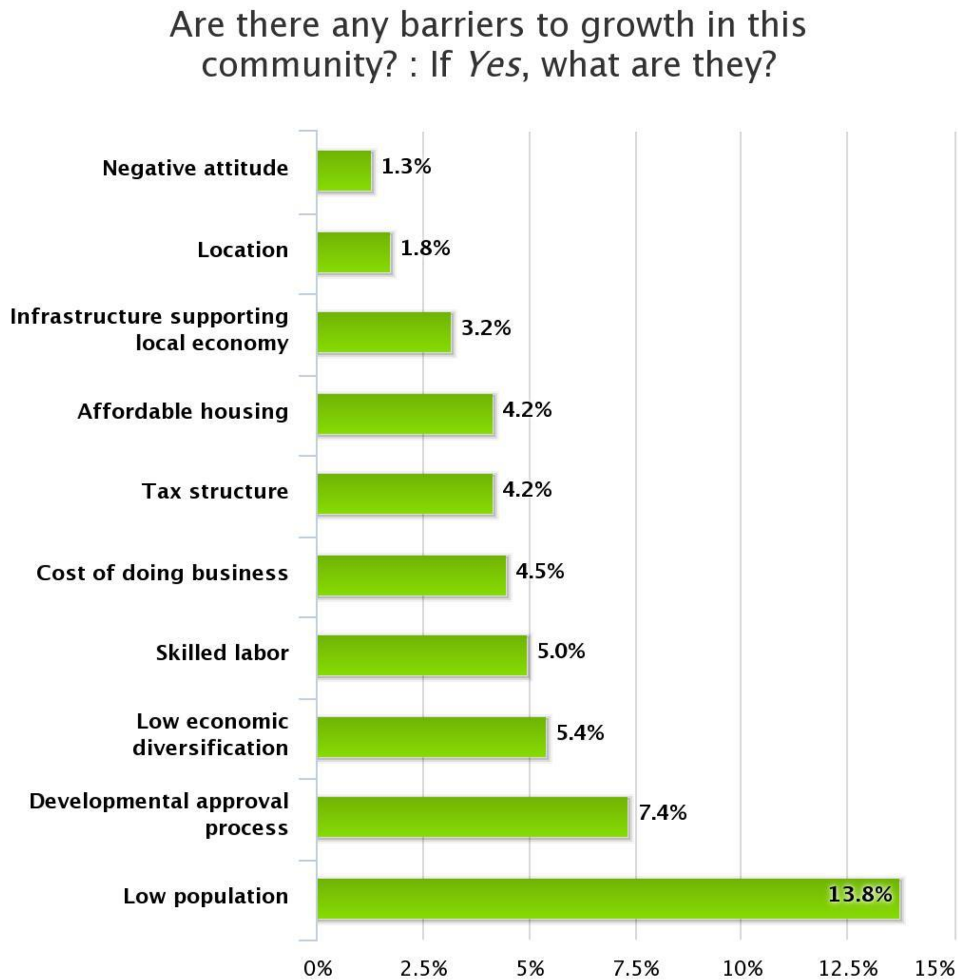


Note: 336 respondents

Business Growth

As detailed in figure 83, below, 85% of respondents (637 businesses) indicated that there are barriers to growth. The highest number of respondents (14% or 86 businesses) stated that the low population is the most important barrier to growing the community's economy. Other commonly cited barriers include: the development process (7% or 46 businesses), low economic diversification (5% or 34 businesses) and skilled labour shortages (5% or 31 businesses).

Figure 83: Barriers to growth in the community



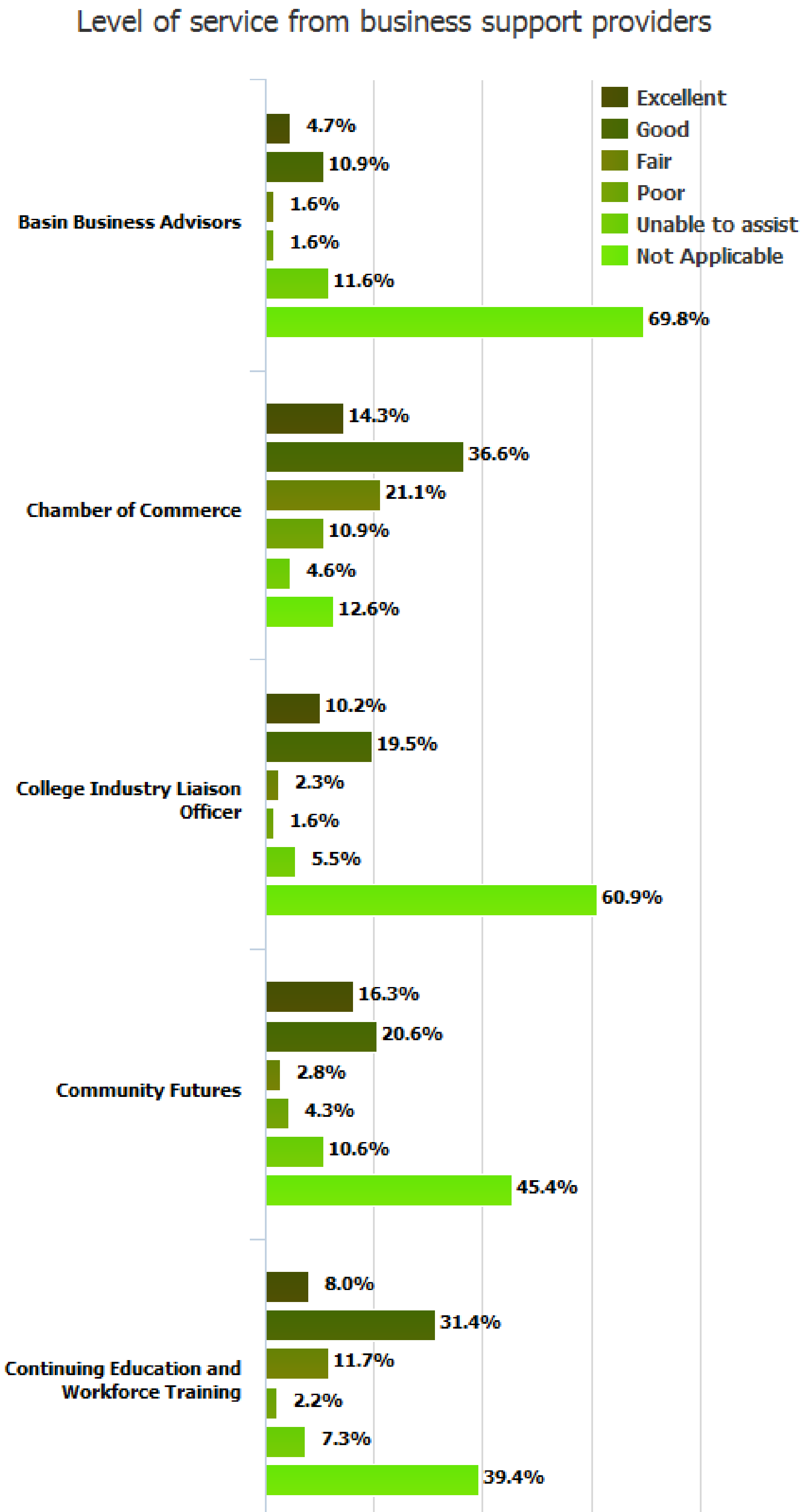
Note: 316 respondents

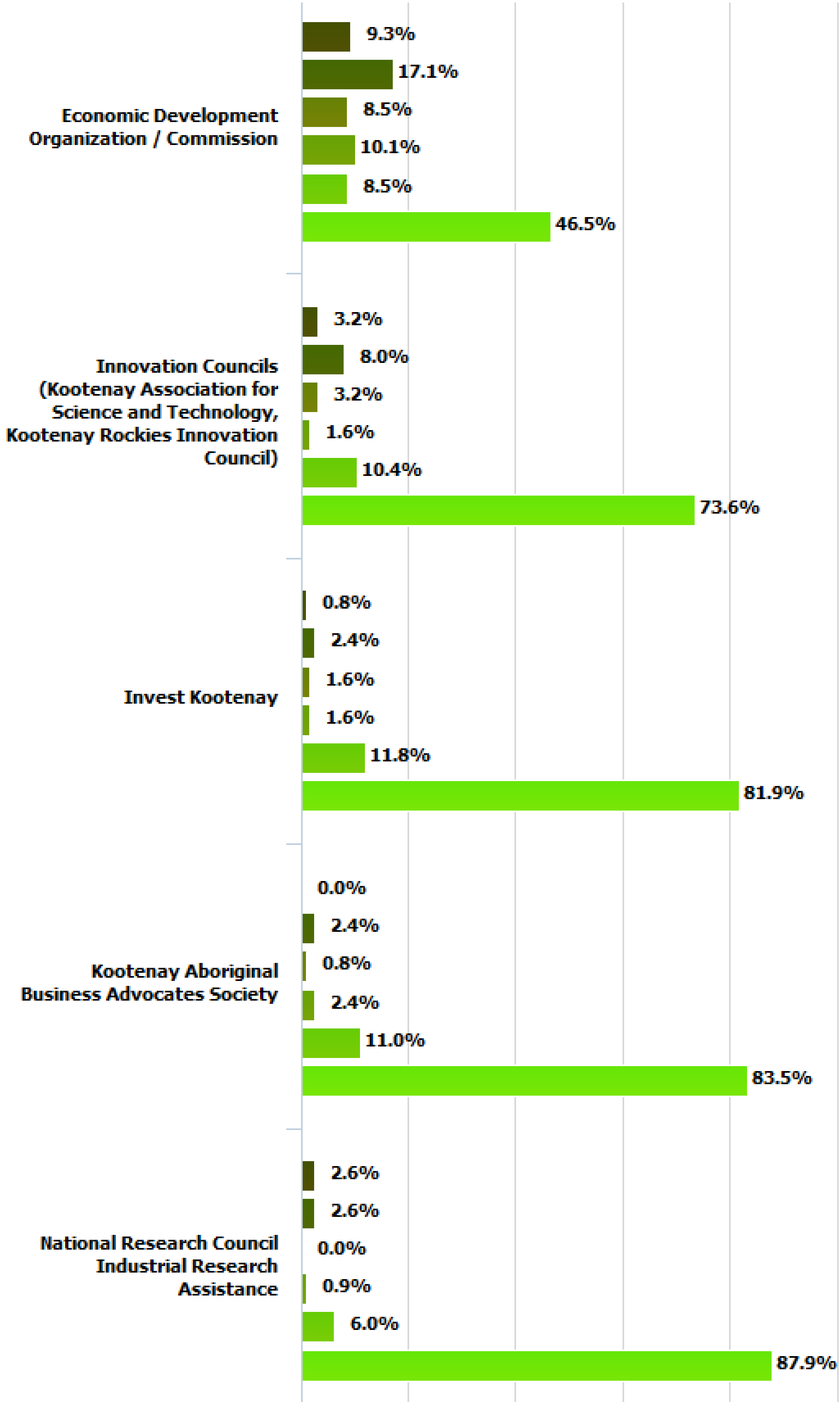
Respondents were asked about the level of support they received from various business support providers. The Chamber of Commerce received the highest responses in each category; clearly, this is a reflection on the level of support they offer[13].

- ***Excellent*** response (14% or 25 businesses),
- ***Good*** responses (37% or 64 businesses),
- ***Fair*** responses (21% or 37 businesses), and
- ***Poor*** response (11% or 19 businesses),

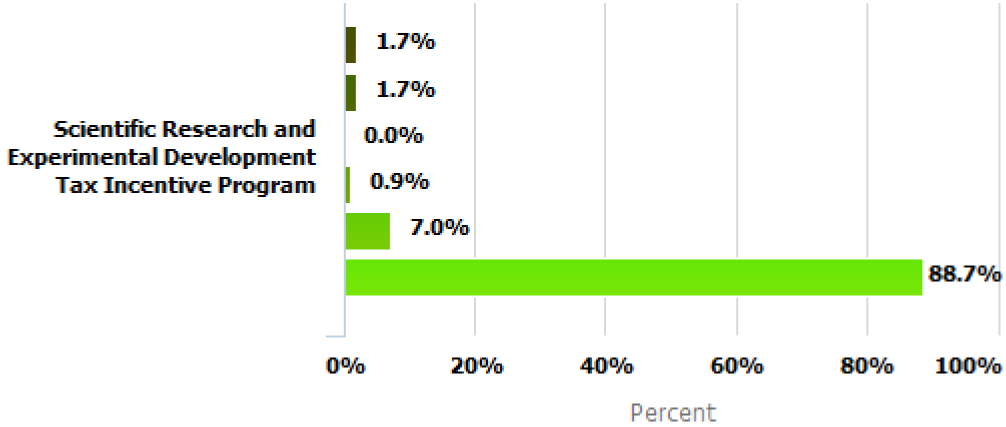
[13] Response rate regarding Chamber of Commerce was 175. This was 30 responses more than the next most frequently commented upon source (Community Futures), and 50 more responses than the remainder.

Figure 84: Level of service from business support providers





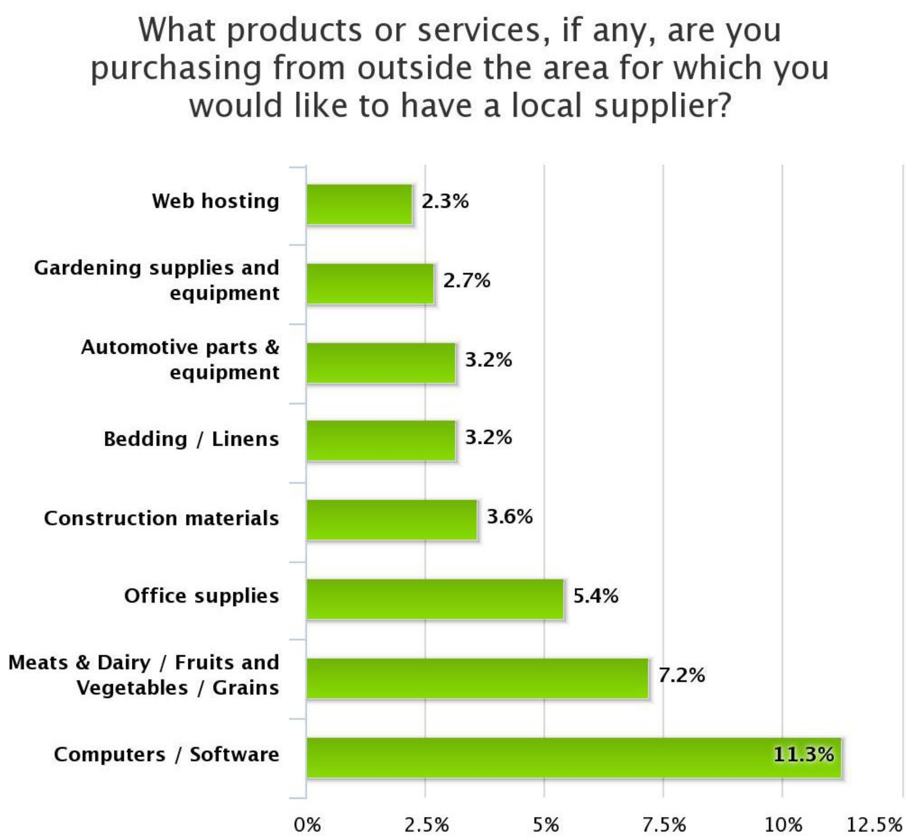
Economic Development Organization / Commission
9.3%
17.1%
8.5%
10.1%
8.5%
46.5%
Innovation Councils (Kootenay Association for Science and Technology, Kootenay Rockies Innovation Council)
3.2%
8.0%
3.2%
1.6%
10.4%
73.6%
Invest Kootenay
0.8%
2.4%
1.6%
1.6%
11.8%
81.9%
Kootenay Aboriginal Business Advocates Society
0.0%
2.4%
0.8%
2.4%
11.0%
83.5%
National Research Council Industrial Research Assistance
2.6%
2.6%
0.0%
0.9%
6.0%
87.9%



Note: 115-175 respondents

29% of respondents (70 businesses) indicated that there are suppliers that could locate in the region. The most often cited desired product or service was computers/software (11% or 25 businesses). Following computers were: food and food products (7% or 16 businesses), office supplies (5% or 12 businesses), and construction materials (4% or 8 businesses).

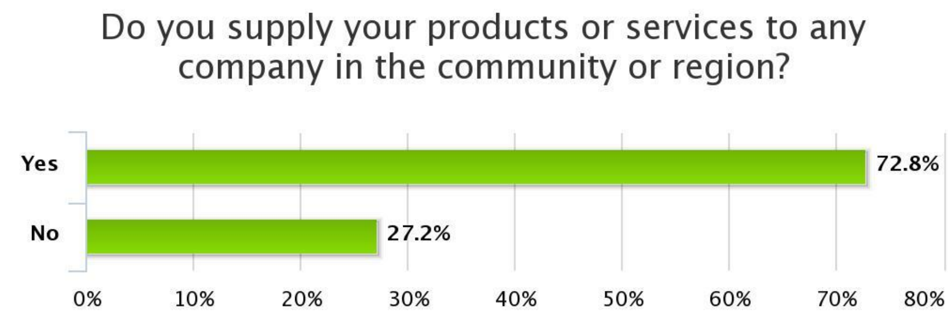
Figure 85: Potential Suppliers



Note: 222 respondents

73% of respondents (110 businesses) indicated that they do supply products or services to companies located in the community or region.

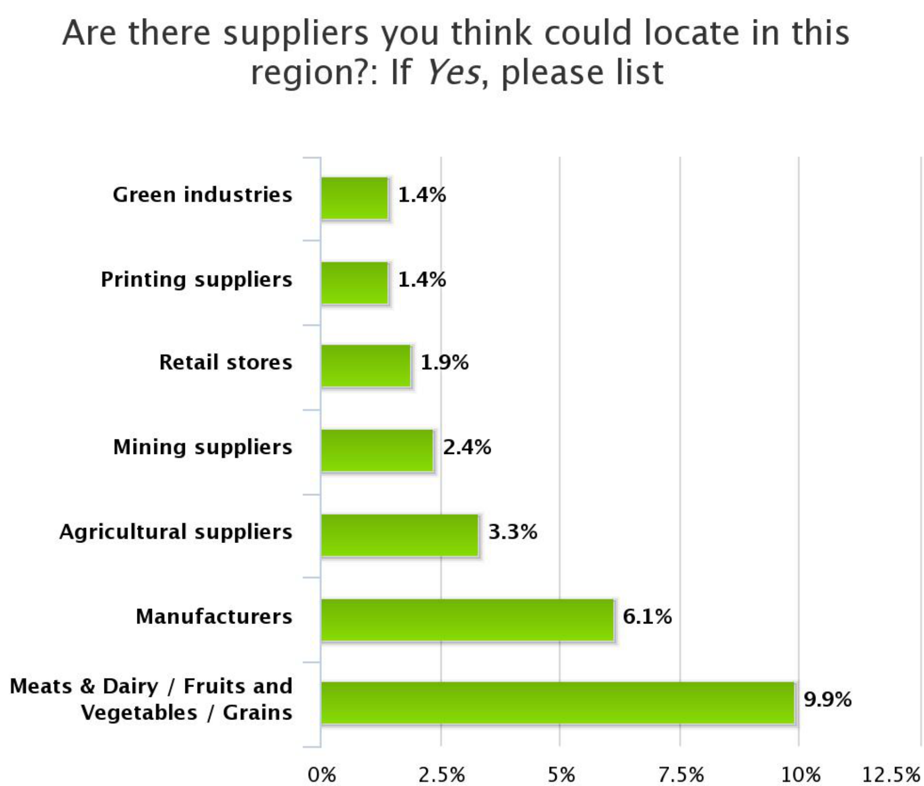
Figure 86: Supply to local companies



Note: 151 respondents

66% of respondents (435 businesses) indicated that there are sectors, businesses or industries that could be attracted to the region. Regional food production, manufacturing, agricultural supplies and mining supplies were the most frequently cited businesses/sectors identified as important to attract. Retail stores, printing suppliers, and green industries followed.

Figure 87: Sectors, businesses or industries that could be attracted to region



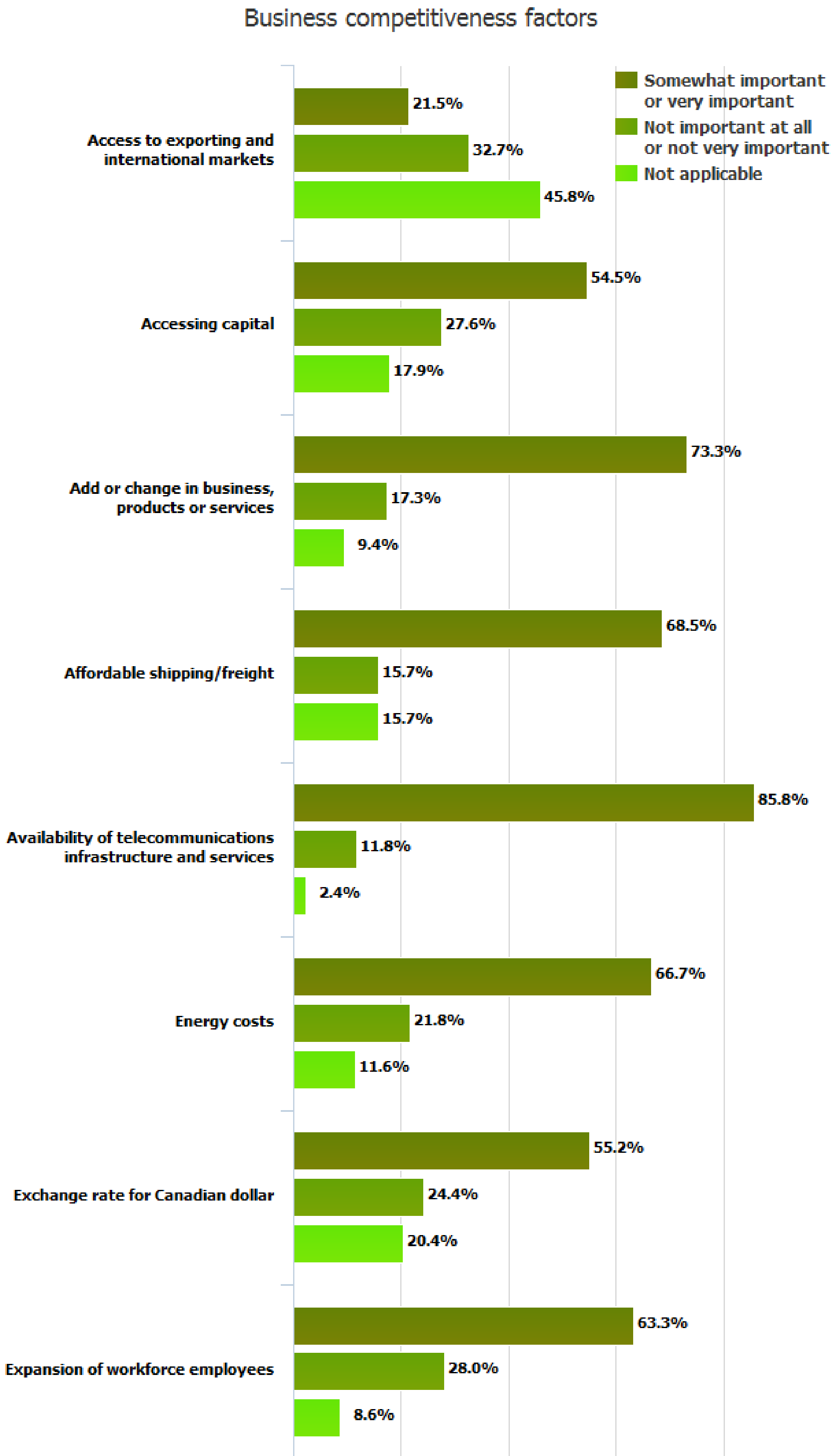
Note: 73 respondents

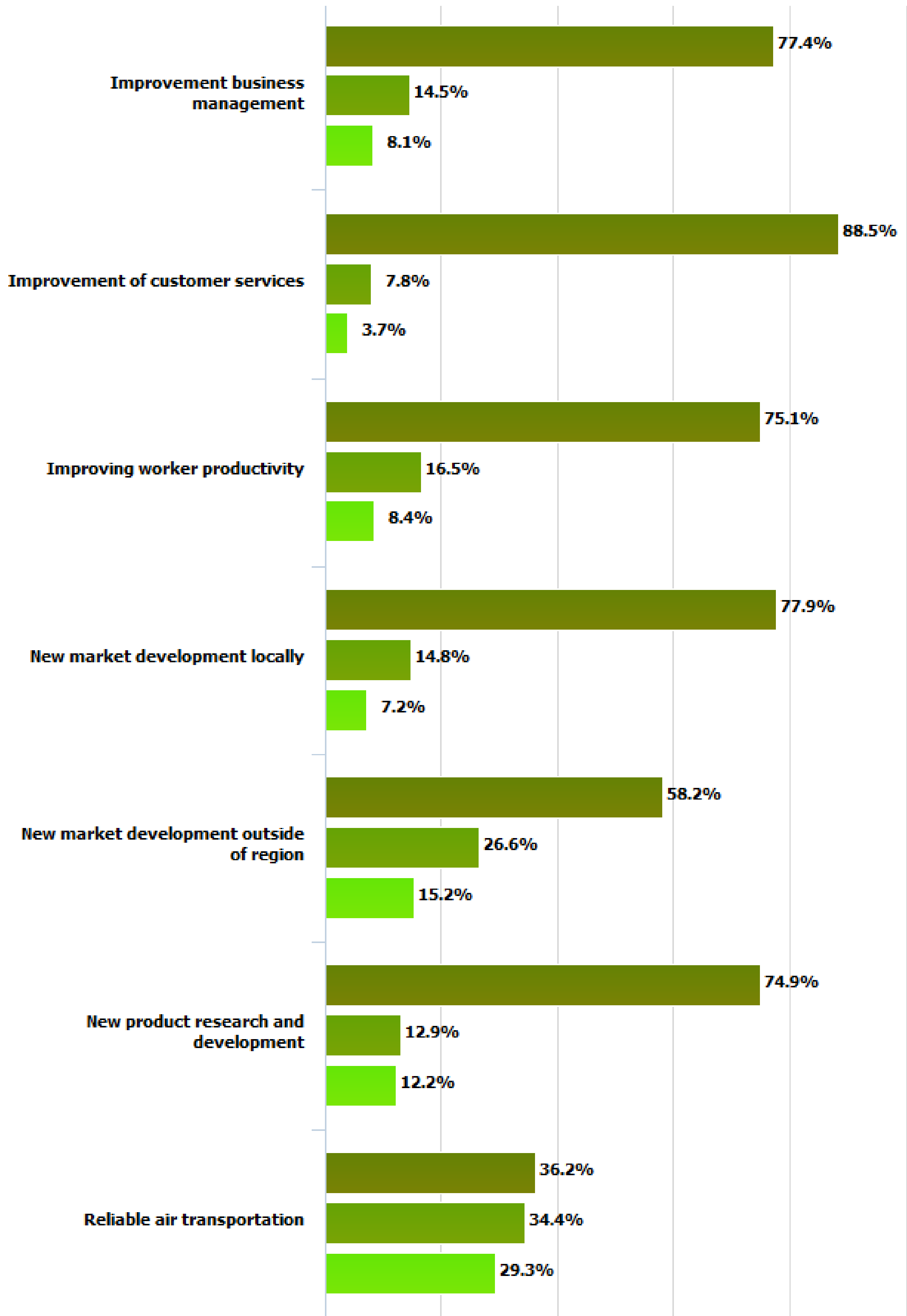
Business Competitiveness and Productivity

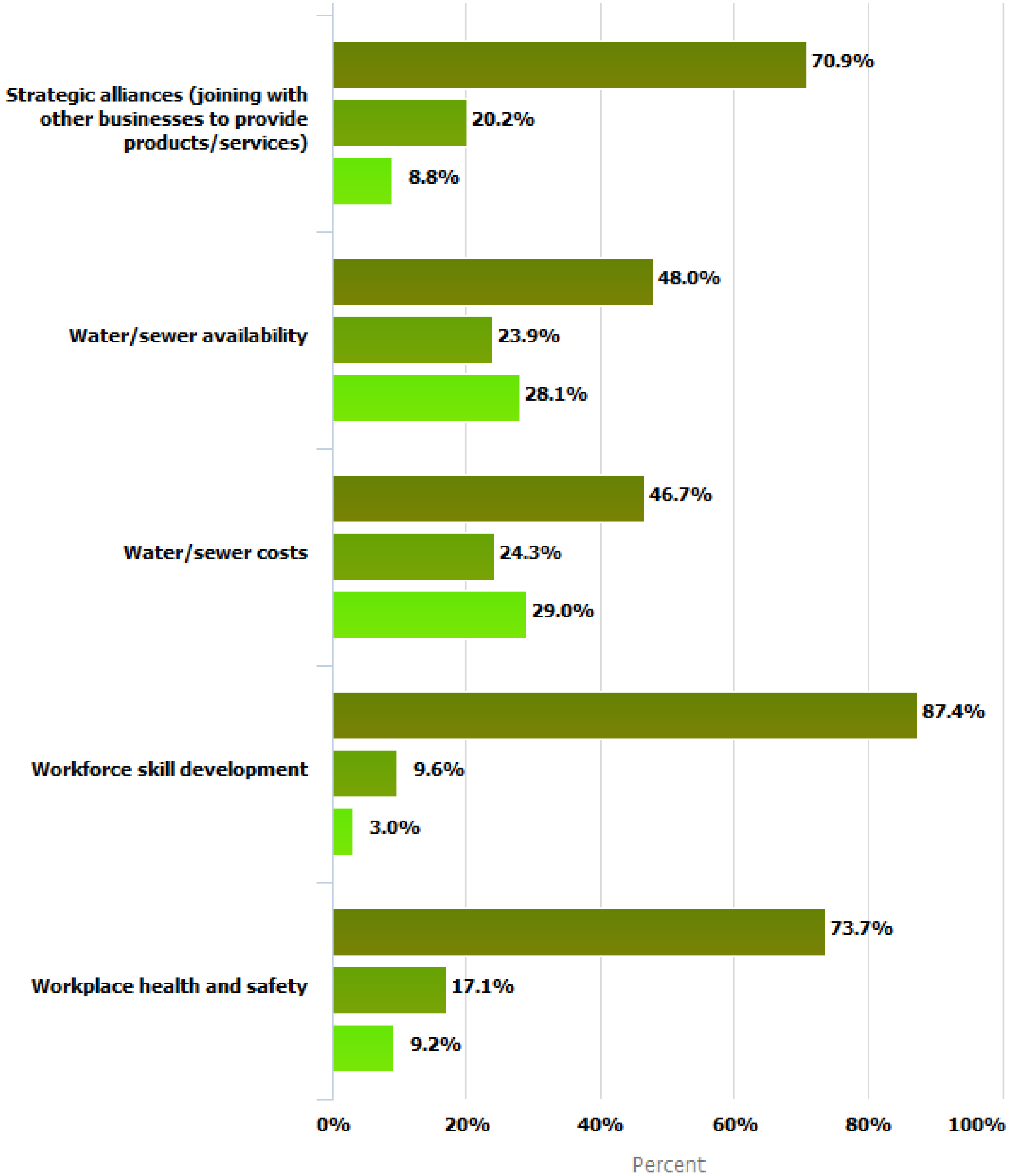
Respondents were asked to rate the importance of various factors for ensuring business competitiveness, over the next five years, as either very important, somewhat important, not very important, not at all important or not applicable to their business.

- The factors that received the highest number of **Not At All Important** ratings included:
  - Accessing International Markets (17% / 85 businesses),
  - Reliable Airport Service (15% or 76 businesses), and
  - Capital Access (11% / 55 businesses).
- The factors that received the highest number of **Not Very Important** ratings included:
  - Reliable Airport Service (19% or 99 businesses),
  - Expanding the Workforce (19% or 97 businesses), and
  - Capital Access (17% / 85 businesses).
- The factors that received the highest number of **Somewhat Important** ratings included:
  - Adding or Changing Products & Services (41% / 211 businesses),
  - Strategic Alliances (39% or 196 businesses), and
  - Expanding the Workforce (36% / 186 businesses).
- The factors that received the highest number of **Very Important** ratings included:
  - Telecommunications (62% / 316 businesses),
  - Customer Service (58% or 298 businesses), and
  - Workforce Skill Development (56% / 283 businesses).
- The factors that received the highest number of **Not Applicable** ratings include:
  - Accessing International Markets (46% / 234 businesses),
  - Reliable Airport Service (29% or 149 businesses), and
  - Water and Sewage Costs (29% / 147 businesses).

Figure 88: Importance of business competitiveness factors




Improvement business management
77.4%
14.5%
8.1%
Improvement of customer services
88.5%
7.8%
3.7%
Improving worker productivity
75.1%
16.5%
8.4%
New market development locally
77.9%
14.8%
7.2%
New market development outside of region
58.2%
26.6%
15.2%
New product research and development
74.9%
12.9%
12.2%
Reliable air transportation
36.2%
34.4%
29.3%

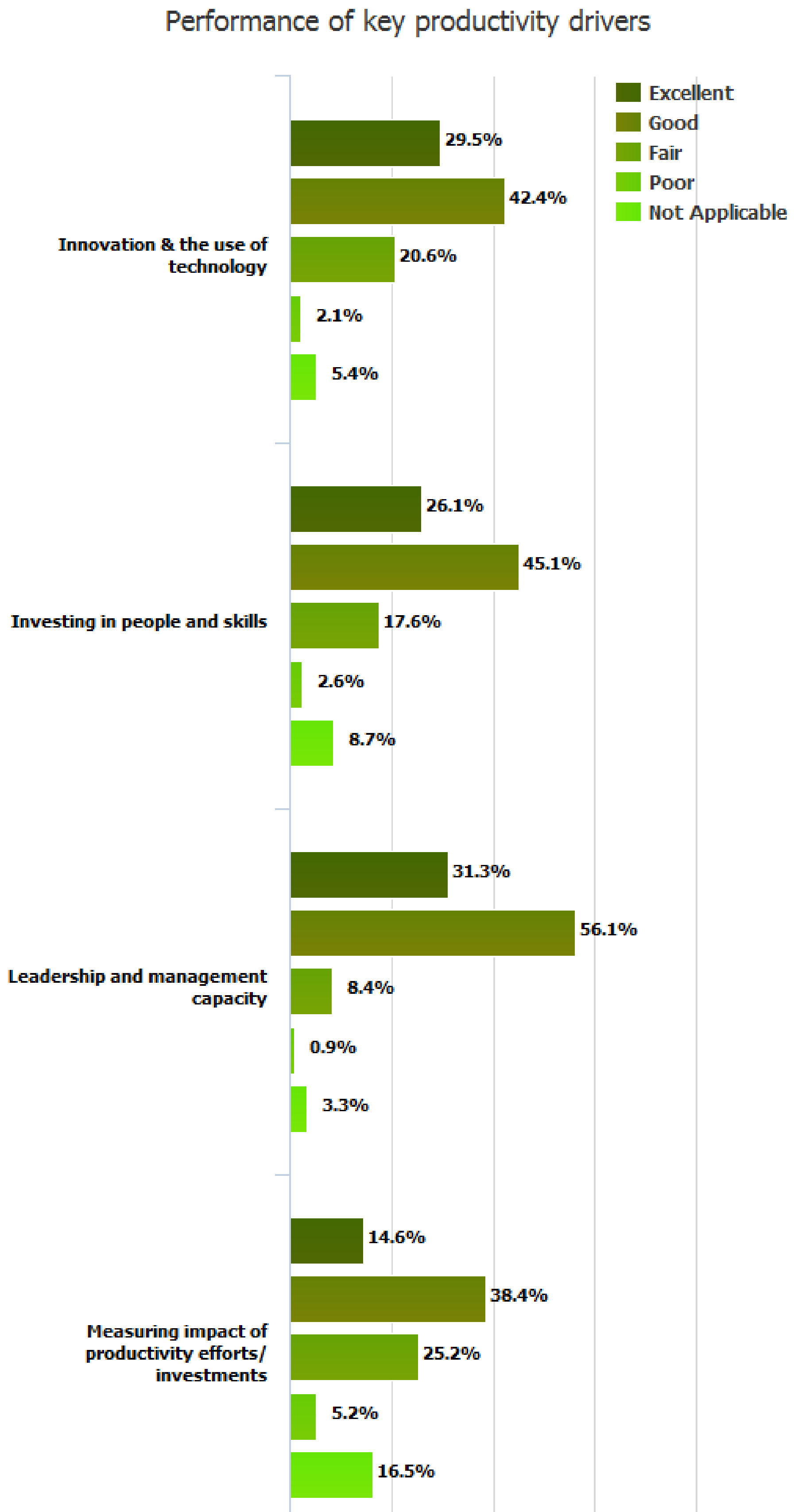


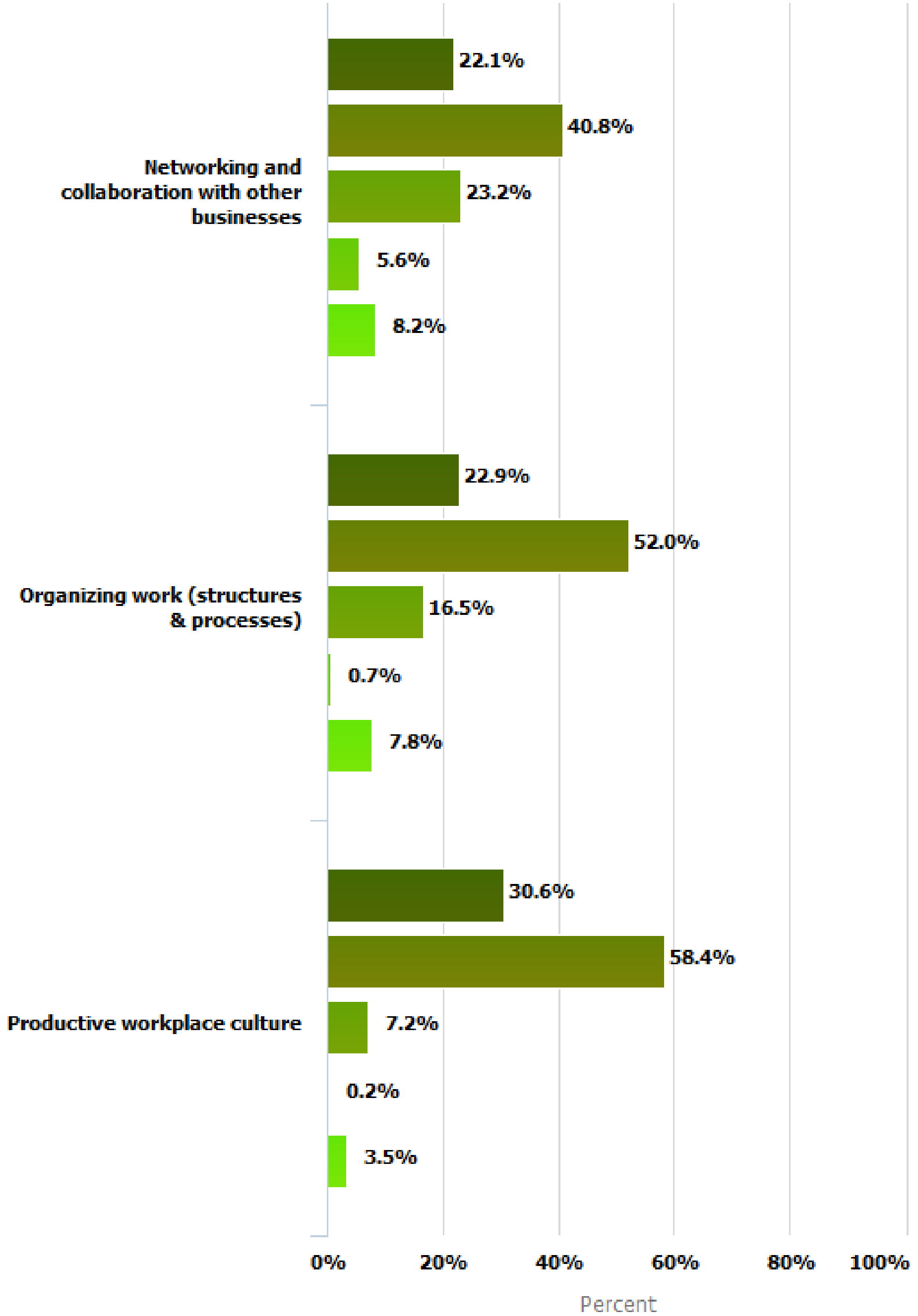
Note: 495-512 respondents

Respondents were asked to rate their business' performance on a list of productivity drivers.

- The drivers that received the highest number of **EXCELLENT** ratings included:
    - Leadership and management capacity (31% or 134 businesses),
    - Productive workplace culture (31% or 131 businesses), and
    - Innovation & the use of technology (30% or 126 businesses).
- The drivers that received the highest number of **GOOD** ratings included:
    - Productive workplace culture (58% or 250 businesses),
    - Leadership and management capacity (56% or 240 businesses), and
    - Organizing work (structures & processes) (52% or 220 businesses).
- The drivers that received the highest number of **FAIR** ratings included:
    - Measuring impact of productivity efforts/investments (25% or 107 businesses),
    - Networking and collaboration with other businesses (23% or 99 businesses), and
    - Innovation & the use of technology (21% or 88 businesses).
- The drivers that received the highest number of **POOR** ratings included:
    - Networking and collaboration with other businesses (6% or 24 businesses),
    - Measuring impact of productivity efforts/investments (5% or 22 businesses), and
    - Investing in people and skills (3% or 11 businesses).
- The drivers that received the highest number of **N/A** ratings included:
    - Measuring impact of productivity efforts/investments (17% or 70 businesses), and
    - Investing in people and skills (9% or 37 businesses).
    - Networking and collaboration with other businesses (8% or 35 businesses),

Figure 89: Performance on key productivity drivers



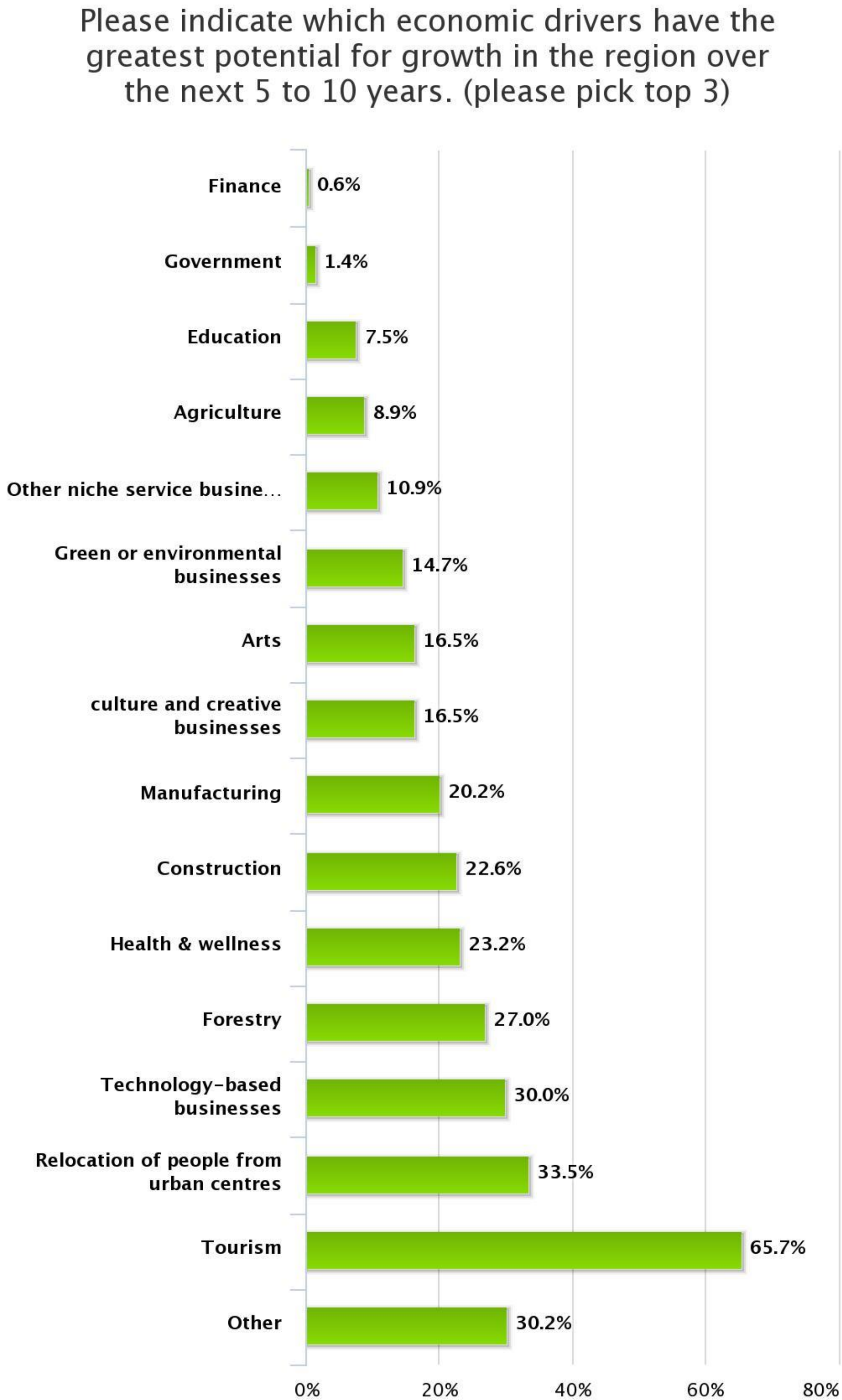


Note: 423-428 respondents

Economic Drivers

Respondents believe that the economic drivers with the highest growth potential over the next 5 to 10 years include tourism (66% or 331 businesses), amenity migration (34% or 169 businesses), and tech-based businesses (30% or 151 businesses). For a list of drivers identified as "Other", refer to Appendix A (mining was the only significant driver, with 14% or 70 businesses citing it).

Figure 90: Economic drivers with greatest growth potential

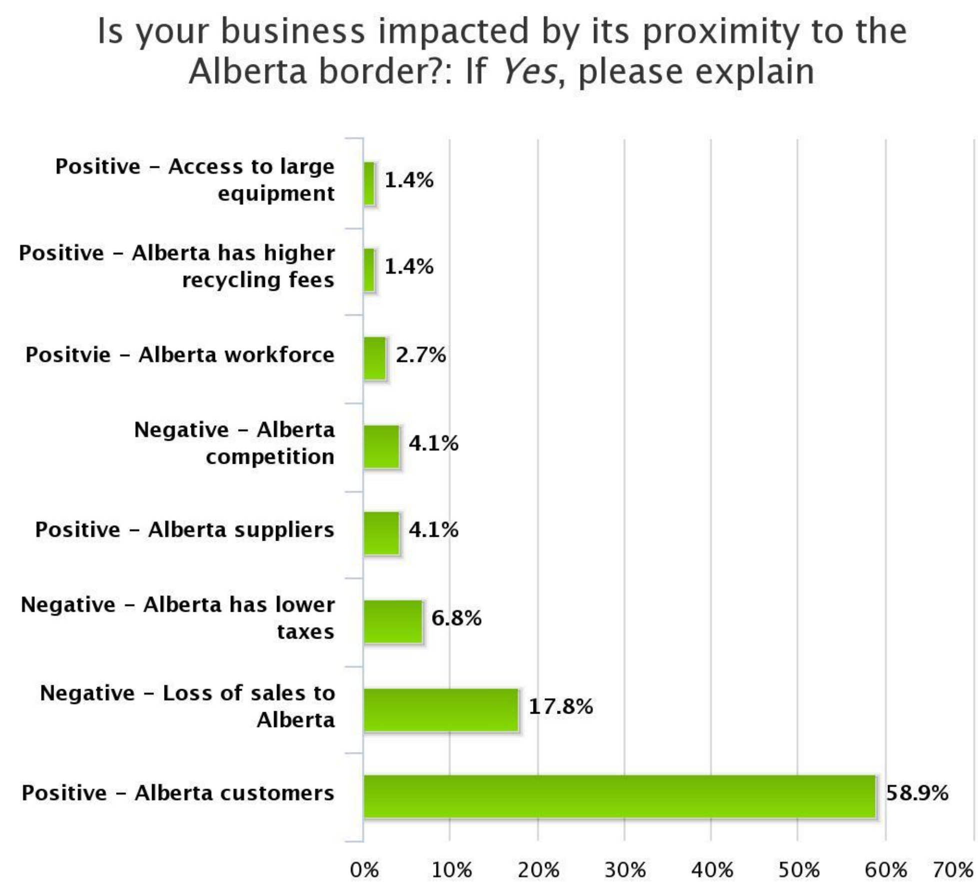


Note: 504 respondents

Proximity to Alberta

75 respondents (66% of question respondents) reported that they were impacted by their proximity to Alberta. Accessing Alberta's customers was the top impact with 59% of respondents citing this as the main impact (43 businesses), while 18% (13 businesses) indicated that loss of sales to Alberta businesses was their biggest impact.

Figure 91: Impact of Proximity to Alberta



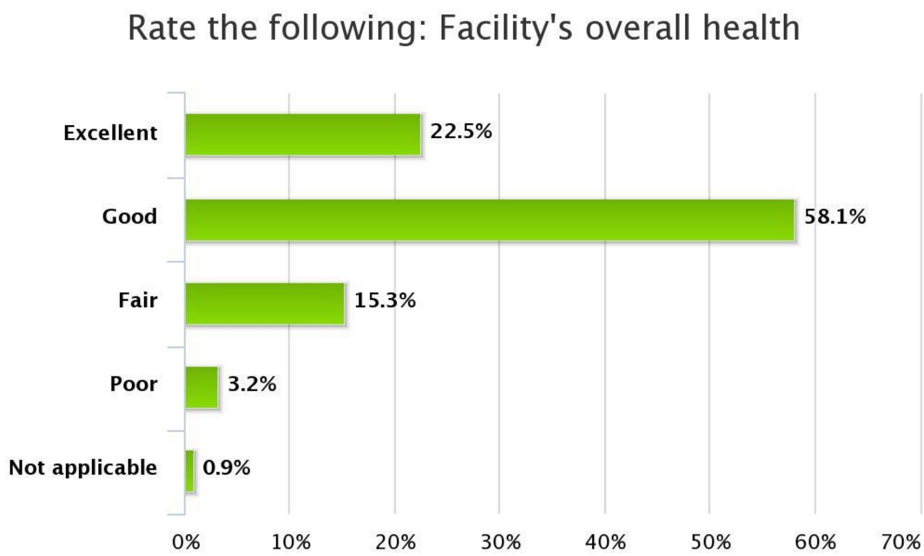
Note: 73 respondents

Assessment and Plans

Overall Health

The majority of businesses surveyed reported that their facility is in overall good health (58% or 398 businesses), 22% (154 businesses) reported that their company's health is excellent and 15% (105 business) reported that it is fair. Only 3% (22) respondents indicated that their company is in poor health.

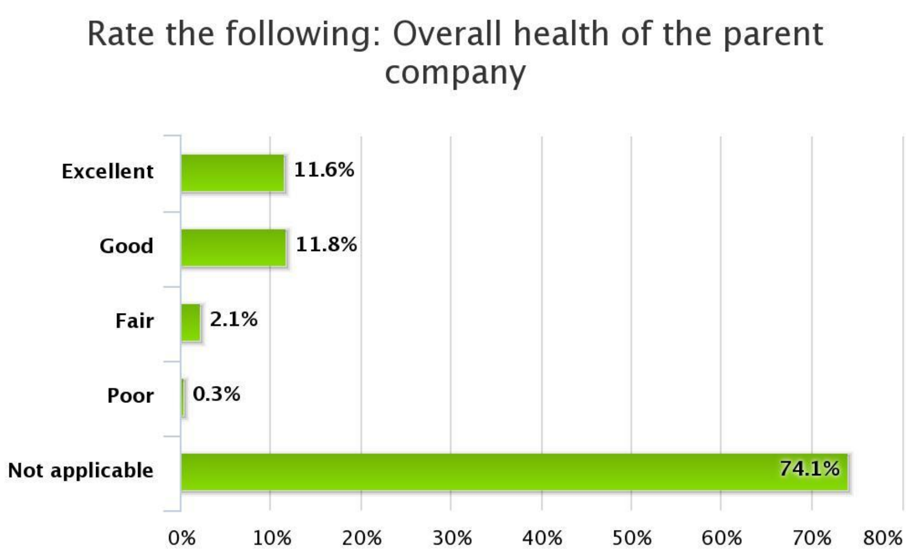
Figure 92: Facility's overall health



Note: 685 respondents

Most businesses with a parent company indicated that the health of that parent company is either excellent (12% or 71 businesses) or good (12% or 72 businesses).

Figure 93: Overall health of parent company

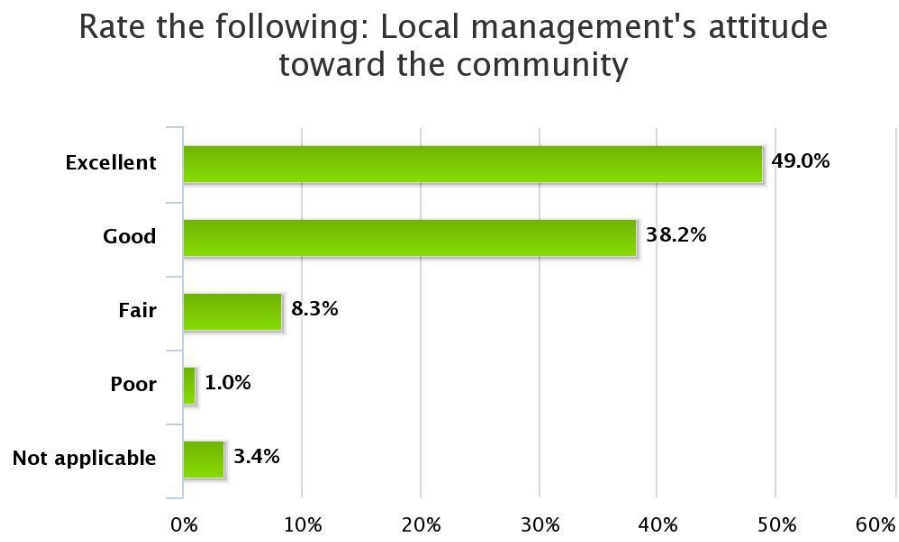


Note: 611 respondents

Attitude toward Community

49% of respondents (329 businesses) indicated that their local management's attitude toward the community is excellent and 38% (257 businesses) indicated that it is good.

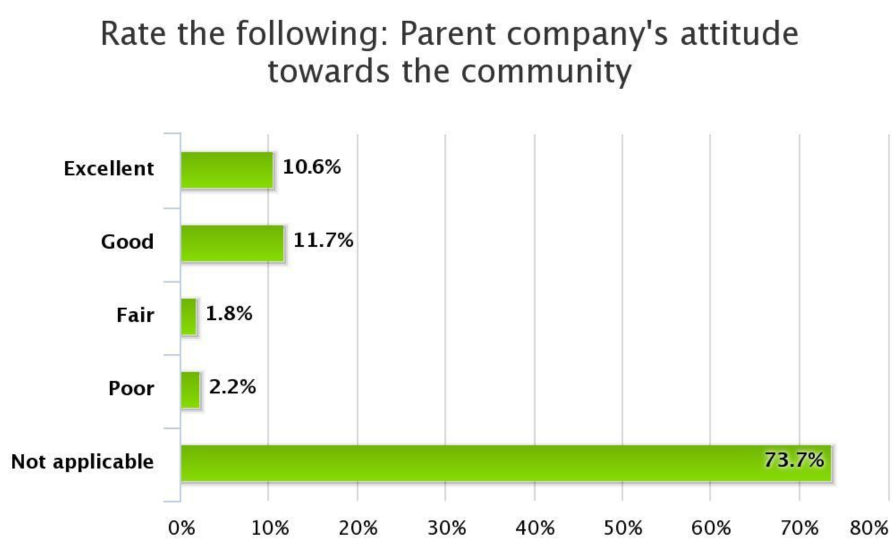
Figure 94: Local management's attitude toward community



Note: 672 respondents

The highest number of respondents (12% or 70 businesses) indicated that their parent company's attitude toward the local community is good. 11% (63 businesses) indicate that it is excellent, 2% each (11 and 13 businesses respectively) indicate that the parent company's attitude toward the community is fair or poor.

Figure 95: Parent company's attitude toward local community

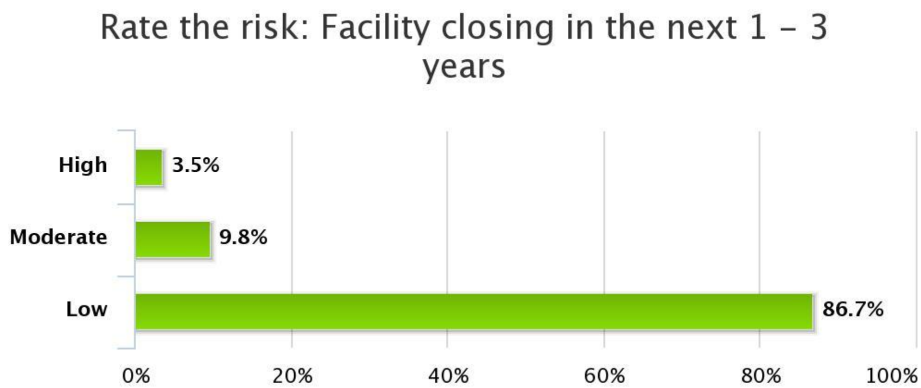


Note: 597 respondents

Risk of Closing or Downsizing

Data indicates that the risk of businesses closing or downsizing is low. Only 4% (25 business) of respondents reported that they are at a high risk of closing or downsizing in the next 1-3 years. Another 10% (70 businesses) say there is a moderate risk, but 87% (619 businesses) claim there is a low risk of closure.

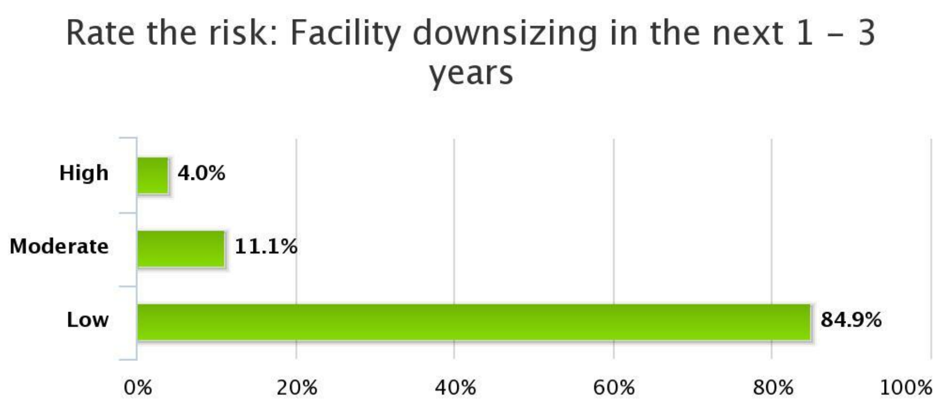
Figure 96: Risk of facility closing



Note: 714 respondents

Similarly, the data indicates that the risk of downsizing is low, with only 4% (28 businesses) indicating that risk is high. 11% (77 businesses) cite a moderate risk, and 85% (591) or respondents say the risk of downsizing is low.

Figure 97: Risk of facility downsizing



Note: 696 respondents

Recommendations

Next Steps

The results of this survey can be used by economic and workforce development organizations throughout the Basin-Boundary region to inform short- and long-term action planning. Comparison of local results to the larger body of evidence may point to potential collaborations and thinking at a regional level. Further, regional governments and institutions with a regional perspective may use this information to inform their policies and activities.

Many BRE actions also lead to long-term programs (e.g., a 'Buy Local' program), or ongoing plans and policies. Patience and a commitment over the long-term are critical in determining the success of these initiatives. For this reason, BRE should be thought of, and implemented as, an on-going process as opposed to a one-time project. Continued support from both the RDI and the CBT will be instrumental to ensuring success over the long-term.

As indicated in the RDI report on BRE Best Practices in the Basin-Boundary, a community's capacity to plan and act strategically is a critical factor in determining the success of a BRE project. Regional level institutions should support the building of a strong economic development culture throughout the Basin-Boundary. This may involve efforts such as: hosting ED 101 learning days across the region, exploration of shared EDO positions for under-served communities, supporting the existing EDP network that works throughout the region, and/or targeted ED related learning opportunities for municipal level staff and officials.

Potential Action Areas

Local Workforce

Almost 90% of workers are hired locally with roughly 50% expecting recruiting difficulties in the near-term. The most significant workforce gaps seem to be in the service industry (Food & Beverage, Retail, Tourism), trades (mechanics, construction, machine operation), and professional and high-tech fields.

Regional planning stakeholders may wish to focus on the labour market through two principal avenues: information dissemination and training. Assisting both employers and potential employees gather and disseminate information can help ease search costs and direct training needs. Future targeted training and skills development opportunities, informed by research, will help create a workforce that is better prepared to move into the knowledge economy and bolster innovation and productivity.

Other programs or services that reduce the costs and pressures of maintaining employment should also be considered. The top four identified workforce challenges fall into this category. These are: cost of living, housing, child-care, and transportation.

Youth Employment

With just over 7% of the reported jobs being 'entry-level' in nature, it is not surprising to see that only 8% of the regional workforce is in the 'under 25' age category. This is, of course, tied to the regional demographic trend which sees a general out-migration of young adults (20 – 24).

Regional stakeholders should be looking at youth focused actions that ensure we have sufficient opportunities for our young adults. The general workforce action areas may all be applied with a youth focus. Developing apprenticeship/training/grooming programs that encourage regional businesses to spend some of their resources bringing up the younger workforce would be helpful. This would help create a collective culture of training and workforce development.

Business Growth & Expansion

49% of businesses in the region report being in a growth cycle, and 49% indicate that they are planning to expand within the next three years. Roughly 32% of those businesses planning to expand do not feel their existing site is adequate, and 86% of expansion plans are expected to occur within the community. Businesses also report that current and expected future employment levels are stable or increasing. This data coupled with the general positive business climate and the optimism for the future provides a positive report on local business growth.

Actions in this area could include supporting existing businesses as they plan for local expansion/growth. Assistance could come in the form of navigating local regulations, identifying and securing new sites, and connecting businesses with resources to assist in expansion projects. It is worth noting that very few businesses sought assistance with expansion efforts from an external organisation. This is an area where improvements could be made to have local resources approach businesses proactively to understand barriers and work collaboratively towards solutions.

EDPs and other business supports could anticipate the need to respond to stated barriers to expansion, which include: access to finance, lack of skilled staff and lack of suitable premises.

Supply Sourcing and Procurement

A hefty majority (69%) of sales are generated from the local or regional economy. However, companies spread their procurement much further afield, with only 29% of supplies sourced from within the region. It seems our region faces supply chain and value chain problems; we buy from outside, but sell within.

The most common response (84%) for the reason why supplies are sourced outside of the local area is that they are not available locally. While it will not be universally, true, this clearly indicates that there are opportunities for both new product/service development and business expansion within the region. EDOs and EDPs, at the local or sub-regional level, may wish to start analysing sectors of interest to identify market opportunities for the region's businesses.

Local businesses to do not appear to engage with government procurement processes, with only 29% of businesses indicated that they have. A significant number of non-responses (372 businesses) suggest there may be a lack of awareness of the opportunities available through government procurement. Education and awareness of the opportunities available through municipal, regional, and provincial procurement processes could be promoted through seminars, profiles in communication material, and promotion on relevant websites.

Training

While the region's colleges received passing grades from business, availability of: safety (first-aid, food safety etc.), sales and marketing, business management, technical training and emerging industry practices were identified. Findings indicate that the majority (53%) of businesses do have a training budget, but they have no discernible preference for delivery methods (in-class, one-on-one, workshops etc.). Future initiatives could include supporting networks to help businesses identify shared training needs, and working with educational institutions to ensure local skill requirements are considered in programming.

Succession and Business Planning

Business and succession planning are critical to the health and longevity of businesses. 16% of Basin-Boundary businesses planning to exit their business in the intermediate future. 17% of respondents indicated that they have a formal succession plan and just over half have an up-to-date business plan. Furthermore, business and management training was among the top cited areas of training needs.

Findings suggest that there are opportunities to support the business community by providing succession and business planning assistance. Given the importance of individual circumstances, and the primacy of privacy, in business and succession planning, and a stated preference for individual coaching, one-on-one assistance program could result in greater overall benefit by providing a higher level of support to businesses and generating greater uptake. Any future planning support initiatives should be aggressively advertised to ensure uptake among local businesses, and may include direct outreach to those businesses identified as part of the BRE survey.

Government Services

Two primary themes emerged in the criticisms of government services and infrastructure: insufficiency of transportation infrastructure, and difficulty in accessing space to expand existing businesses. Criticisms around transportation identified airport services, ground transportation services, telecommunications and warehousing as insufficient. Criticisms around expansion focus on the availability of appropriately zoned lands, development approval processes and availability of rental or lease space.

With roughly $420M in potential investments waiting to happen, there is an opportunity for local government to work with local businesses to understand existing and future business needs and assess land use planning at a micro level. Issues around the perceived lack of available land and servicing costs may be addressed through communication strategies between the local government, local businesses and the community. Opportunities may exist locally for changes to land use designations and zoning that could serve both the greater community and local businesses. Collaboration and dialogue with targeted businesses could produce valuable results and innovative solutions.

The issues around transportation and communications infrastructure have been long identified. While work is ongoing to address these issues, stakeholders should take confidence that their actions will have an effect and be appreciated. Opportunities for collaboration and collective action should be sought, and public-private partnerships may be explored.

Appendix A: Data Tables

Company Information

		Count	Percent of Question Respondents
Industry Classification	**NAICS**		
Agriculture, forestry, fishing and hunting	**11**	24	3.02%
Mining, quarrying, and oil and gas extraction	**21**	5	0.63%
Utilities	**22**	3	0.38%
Construction	**23**	41	5.16%
Manufacturing	**31-33**	94	11.82%
Retail and Wholesale Trade	**41-45**	195	24.53%
Transportation and Warehousing	**48-49**	10	1.26%
Information and Cultural Industries	**51**	52	6.54%
Finance and Insurance	**52**	24	3.02%
Real Estate and Rental and Leasing	**53**	21	2.64%
Professional, Scientific and Technical Services	**54**	97	12.20%
Administrative Support, Waste Management and Remediation	**56**	6	0.75%
Educational Services	**61**	4	0.50%
Health Care and Social Assistance	**62**	21	2.64%
Arts, Entertainment and Recreation	**71**	39	4.91%
Accommodation and Food Services	**72**	97	12.20%
Other Services	**81**	60	7.55%
Public Administration	**91-92**	2	0.25%
Total		795	100.00%

Survey Participants:	795
Question Respondents:	795
No Response Count:	0
Response Rate:	100%

	Count	Percent of Question Respondents
Functions located at this facility		
Engineering/RD	76	15.77%
Manufacturing	99	20.54%
Warehousing	99	20.54%
Distribution	122	25.31%
Headquarters	180	37.34%
Services	410	85.06%
Total	986	

Survey Participants:	795
Question Respondents:	482
No Response Count:	313
Response Rate:	61%

	Count	Percent of Question Respondents
Who are your competitors?: Where are your competitors located?		
Outside Canada	19	12.18%
In Canada	22	14.10%
In Province	139	89.10%
Total	180	

Survey Participants:	795
Question Respondents:	156
No Response Count:	639
Response Rate:	20%

Factors for Success

	Count	Percent of Question Respondents
What are the factors that make your company successful here?		
Advertising	1	0.15%
Customer Service	1	0.15%
Road construction	1	0.15%
Mining	2	0.30%
Branding	5	0.75%
Deversified services	6	0.90%
Natural resources	7	1.05%
Niche product	8	1.20%
Demand for products and services	14	2.11%
Technical expertise	14	2.11%
Hard work	15	2.26%
Tourism	15	2.26%
Community support	17	2.56%
Workforce / Staff	20	3.01%
Networking	21	3.16%
Word of mouth	26	3.91%
Competitive pricing	29	4.36%
Experience	30	4.51%
Knowledge	36	5.41%
Lack of competition	36	5.41%
Reputation	38	5.71%
Established business	40	6.02%
Location	74	11.13%
Customer service	85	12.78%
Quality product / service	86	12.93%
Total	627	

Survey Participants:	795
Question Respondents:	665
No Response Count:	130
Response Rate:	84%

Location

	Count	Percent of Question Respondents
Location of company's headquarters		
Outside Canada	18	3.87%
Elsewhere in nation	43	9.25%
In Province	404	86.88%
Total	465	

Survey Participants:	795
Question Respondents:	465
No Response Count:	330
Response Rate:	58%

	Count	Percent of Question Respondents
Location of company's headquarters: Province		
AL	1	0.64%
CA	1	0.64%
MB	1	0.64%
MS	1	0.64%
OR	1	0.64%
SK	1	0.64%
WI	1	0.64%
QC	4	2.55%
ON	7	4.46%
AB	11	7.01%
BC	128	81.53%
Total	157	

Survey Participants:	795
Question Respondents:	157
No Response Count:	638
Response Rate:	20%

	Count	Percent of Question Respondents
Location of company's headquarters: Nation		
Australia	1	0.68%
Belgium	1	0.68%
United Kingdom	1	0.68%
United States	10	6.76%
Canada	135	91.22%
Total	148	

Survey Participants:	795
Question Respondents:	148
No Response Count:	647
Response Rate:	19%

	Count	Percent of Question Respondents
Does this company have another location elsewhere?		
Yes	149	28.22%
No	379	71.78%
Total	528	

Survey Participants:	795
Question Respondents:	528
No Response Count:	267
Response Rate:	66%

	Count	Percent of Question Respondents
Does this company have another location elsewhere?: If *Yes*, where?		
Outside Canada	8	17.78%
Elsewhere in nation	19	42.22%
In Province	35	77.78%
Total	62	

Survey Participants:	795
Question Respondents:	45
No Response Count:	104
Parent Question 'Yes' Respondents:	149
Parent Question Respondents:	528
Response Rate:	30%

	Count	Percent of Question Respondents
Corporate headquarters location, if different than local location		
China	1	7.69%
United States	1	7.69%
Canada	11	84.62%
Total	13	

Survey Participants:	795
Question Respondents:	13
No Response Count:	136
Parent Question 'Yes' Respondents:	149
Parent Question Respondents:	528
Response Rate:	9%

	Count	Percent of Question Respondents
Why did you choose this community to locate your business?		
Bought an existing business	1	0.61%
Great community	1	0.61%
Moved business when husband relocated	1	0.61%
Moved here to manage the business	1	0.61%
Only insurance company in town	1	0.61%
Opening a business here was a natural fit	1	0.61%
Traditional place of residence	1	0.61%
Transferred here from original company	1	0.61%
Understanding of the business	1	0.61%
Business expansion	2	1.22%
Connections to the community	2	1.22%
Hobby turned into a business	2	1.22%
Natural resources	6	3.66%
Established business	8	4.88%
Proximity to mines	9	5.49%
Lifestyle	11	6.71%
Born and raised here	13	7.93%
Demand for products and services	15	9.15%
Market growth	15	9.15%
Already living here	17	10.37%
Close to family	17	10.37%
Location	17	10.37%
Saw a business opportunity	28	17.07%
Total	171	

Survey Participants:	795
Question Respondents:	164
No Response Count:	631
Response Rate:	21%

AGE AND LIFE CYCLE STAGE

	Count	Percent of Question Respondents
Life cycle stage of firm's primary product/service		
Declining	38	5.01%
Emerging	72	9.50%
Growing	373	49.21%
Maturing	275	36.28%
Total	758	

Survey Participants:	795
Question Respondents:	758
No Response Count:	37
Response Rate:	95%

	Count	Percent of Question Respondents
How long has this facility operated		
<1 Year	38	4.94%
1-4 Years	128	16.62%
5-9 Years	138	17.92%
10-19 Years	181	23.51%
>20 Years	285	37.01%
Total	770	

Survey Participants:	795
Question Respondents:	770
No Response Count:	25
Response Rate:	97%

Ownership and Management

	Count	Percent of Question Respondents
What is this company's ownership status?		
Publicly owned	60	8.78%
Privately owned	623	91.22%
Total	683	

Survey Participants:	795
Question Respondents:	683
No Response Count:	112
Response Rate:	86%

	Count	Percent of Question Respondents
What is this company's legal status?		
Limited liability partnership (LLP)	25	3.22%
Non-profit	32	4.12%
Partnership	81	10.42%
Sole proprietorship	220	28.31%
Corporation	400	51.48%
Other	19	2.45%
Total	777	

Survey Participants:	795
Question Respondents:	777
No Response Count:	18
Response Rate:	98%

	Count	Percent of Question Respondents
What is this company's legal status?: If *Other*, please specify		
Family Trust	1	0.13%
Farm	1	0.13%
Independent	1	0.13%
Labour organisation	1	0.13%
Limited company	1	0.13%
Municipal Government	1	0.13%
Registered Charity (CRA)	1	0.13%
Unlimited	1	0.13%
Sole proprietership	2	0.26%
Corporation	4	0.51%
Non-profit	4	0.51%
Cooperative	8	1.03%
Total	26	

Survey Participants:	795
Question Respondents:	26
No Response Count:	0
Parent Question 'Other' Respondents:	19
Parent Question Respondents:	777
Response Rate:	100%

	Count	Percent of Question Respondents
Has the local facility changed owners or managers in the past 5 years?		
Yes	175	25.40%
No	514	74.60%
Total	689	

Survey Participants:	795
Question Respondents:	689
No Response Count:	106
Response Rate:	87%

	Count	Percent of Question Respondents
If *Yes*, describe the local impact of the change		
Negative	6	3.55%
Neutral	28	16.57%
Positive	135	79.88%
Total	169	

Survey Participants:	795
Question Respondents:	169
No Response Count:	6
Parent Question 'Yes' Respondents:	175
Parent Question Respondents:	689
Response Rate:	97%

	Count	Percent of Question Respondents
Is an ownership change pending for this facility?		
Yes	125	16.47%
No	634	83.53%
Total	759	

Survey Participants:	795
Question Respondents:	759
No Response Count:	36
Response Rate:	95%

	Count	Percent of Question Respondents
If *Yes* what is the anticipated time frame		
1 year or less	30	28.30%
2 years	22	20.75%
3 years or more	54	50.94%
Total	106	

Survey Participants:	795
Question Respondents:	106
No Response Count:	19
Parent Question 'Yes' Respondents:	125
Parent Question Respondents:	759
Response Rate:	85%

	Count	Percent of Question Respondents
If *Yes*, how do you intend to exit the business?		
Close the business down	3	2.78%
Sell/transfer to a family member	18	16.67%
Sell to another company	19	17.59%
Sell/transfer to a non-family member	49	45.37%
Other	19	17.59%
Total	108	

Survey Participants:	795
Question Respondents:	108
No Response Count:	17
Parent Question 'Yes' Respondents:	125
Parent Question Respondents:	759
Response Rate:	86%

	Count	Percent of Question Respondents
If *Yes*, how do you intend to exit the business?: If *other*, please explain		
Being bought out	1	0.93%
Change in board	1	0.93%
Change in partnership	1	0.93%
Loss of partner	1	0.93%
New franchise owner	1	0.93%
Sell to larger company	1	0.93%
Sell or close down	1	0.93%
Sell the building	1	0.93%
Sell to family member	1	0.93%
Start new	1	0.93%
Advertise for a business partner	2	1.85%
Changing to corportation	2	1.85%
Don't know	5	4.63%
Total	19	

Survey Participants:	795
Question Respondents:	19
No Response Count:	0
Parent Question 'Other' Respondents:	19
Parent Question Respondents:	108
Response Rate:	86%

Succession and Business Plans

	Count	Percent of Question Respondents
Have you identified a successor to your business?		
Yes	99	15.97%
No	521	84.03%
Total	620	

Survey Participants:	795
Question Respondents:	620
No Response Count:	175
Response Rate:	78%

	Count	Percent of Question Respondents
Is there a formal succession plan?		
Yes	114	17.40%
No	467	71.30%
Not applicable	74	11.30%
Total	655	

Survey Participants:	795
Question Respondents:	655
No Response Count:	140
Response Rate:	82%

	Count	Percent of Question Respondents
If *Yes*, have you been assisted in preparation of a succession plan?		
Yes	67	68.37%
No	31	31.63%
Total	98	

Survey Participants:	795
Question Respondents:	98
No Response Count:	16
Parent Question 'Yes' Respondents:	114
Parent Question Respondents:	655
Response Rate:	86%

	Count	Percent of Question Respondents
If *Yes*, by whom		
Banker	2	3.85%
Spouse	2	3.85%
Personal financial planner	3	5.77%
Business partner	5	9.62%
Accountant	10	19.23%
Lawyer	12	23.08%
Other	16	30.77%
Total	50	

Survey Participants:	795
Question Respondents:	52
No Response Count:	15
Parent Question 'Yes' Respondents:	67
Parent Question Respondents:	98
Response Rate:	78%

	Count	Percent of Question Respondents
If *Yes*, by whom: If *other*, please explain		
Accountant, Lawyer, and CBT (BBA)	1	1.92%
All of the Above	1	1.92%
Asked for help from Local Govt	1	1.92%
Board of directors	1	1.92%
Caldwell banker	1	1.92%
Canadian Independent Federation of Businesses (guide)	1	1.92%
Consultant / industry groups	1	1.92%
CoreLogic - In house not local in Nelson	1	1.92%
Lawyer, Accountant, Financial Planner	1	1.92%
Tim Horton's succession plan department	1	1.92%
consultant	1	1.92%

	Count	Percent of Question Respondents
If *Yes*, by whom: If *other*, please explain		
head office	1	1.92%
regional district manager of Marks	1	1.92%
workshops	1	1.92%
KAST Mentorship program	2	3.85%
Total	16	

Survey Participants: 795

Question Respondents: 29

No Response Count: 0

Parent Question 'Other' Respondents: 16

Parent Question Respondents: 52

Response Rate: 78%

	Count	Percent of Question Respondents
Does this firm have a current written business plan?		
Yes	383	56.66%
No	293	43.34%
Total	676	

Survey Participants: 795

Question Respondents: 676

No Response Count: 119

Response Rate: 85%

Workforce

Size

	Count	Percent of Question Respondents
Historical employment trend		
Declining	111	16.32%
Staying the same	330	48.53%
Increasing	239	35.15%
Total	680	

Survey Participants:	795
Question Respondents:	680
No Response Count:	115
Response Rate:	86 %

	Count	Percent of Question Respondents
Nature of Employment		
Full Time	11844	73.77%
Part Time	2567	15.99%
Temporary	1645	10.25%
Total	16056	

Survey Participants:	795
Question Respondents:	782
Response Rate:	98.36%

	Count	Percent of Question Respondents
Total number of employees at this facility*: Total employees		
Less than 5	373	47.70%
5-9	190	24.30%
10-19	103	13.17%
20-49	78	9.97%

	Count	Percent of Question Respondents
Total number of employees at this facility*: Total employees		
50-99	21	2.69%
Over 100	17	2.17%
Total	782	

Total employees:	16056
Survey Participants:	795
Question Respondents:	782
No Response Count:	13
Response Rate:	98%

	Count	Percent of Question Respondents
Total number of employees at this facility*: Full-time employees		
Less than 5	485	66.35%
5-9	117	16.01%
10-19	53	7.25%
20-49	52	7.11%
50-99	10	1.37%
Over 100	14	1.92%
Total	731	

Total full-time employees:	11844
Survey Participants:	795
Question Respondents:	731
No Response Count:	64
Response Rate:	92%

	Count	Percent of Question Respondents
Total number of employees at this facility*: Part-time employees		
Less than 5	462	80.77%
5-9	55	9.62%
10-19	38	6.64%
20-49	13	2.27%
50-99	2	0.35%
Over 100	2	0.35%
Total	572	

Total part-time employees:	2567
Survey Participants:	795
Question Respondents:	572
No Response Count:	223
Response Rate:	72%

	Count	Percent of Question Respondents
Total number of employees at this facility*: Temporary employees		
Less than 5	299	83.52%
5-9	27	7.54%
10-19	17	4.75%
20-49	9	2.51%
50-99	4	1.12%
Over 100	2	0.56%
Total	358	

Total temporary employees:	1645
Survey Participants:	795
Question Respondents:	358
No Response Count:	437
Response Rate:	45%

	Count	Percent of Question Respondents
Projected number of employees at this facility in one year*		
Less than 5	322	44.35%
5-9	186	25.62%
10-19	100	13.77%
20-49	77	10.61%
50-99	24	3.31%
Over 100	17	2.34%
Total	726	

Survey Participants:	795
Question Respondents:	726
No Response Count:	69
Response Rate:	91%

	Count	Percent of Question Respondents
Projected number of employees at this facility in three years*		
Less than 5	306	41.46%
5-9	186	25.20%
10-19	114	15.45%
20-49	84	11.38%
50-99	28	3.79%
Over 100	20	2.71%
Total	738	

Survey Participants:	795
Question Respondents:	738
No Response Count:	57
Response Rate:	93%

	Count	Percent of Question Respondents
How did the number of staff change, if at all, in the last 3 years?: Full time		
Increased	173	26.41%
Stayed the same	394	60.15%
Decreased	88	13.44%
Total	655	

Survey Participants:	795
Question Respondents:	655
No Response Count:	140
Response Rate:	82%

	Count	Percent of Question Respondents
How did the number of staff change, if at all, in the last 3 years?: Part time		
Increased	140	24.87%
Stayed the same	348	61.81%
Decreased	75	13.32%
Total	563	

Survey Participants:	795
Question Respondents:	563
No Response Count:	232
Response Rate:	71%

	Count	Percent of Question Respondents
How did the number of staff change, if at all, in the last 3 years?: Casual		
Increased	64	15.02%
Stayed the same	319	74.88%
Decreased	43	10.09%
Total	426	

Survey Participants:	795
Question Respondents:	426
No Response Count:	369
Response Rate:	54%

	Count	Percent of Question Respondents
How do you expect the number of staff to change, if at all over the next 3 years?: Full time		
Increased	266	41.76%
Stayed the same	344	54.00%
Decreased	27	4.24%
Total	637	

Survey Participants:	795
Question Respondents:	637
No Response Count:	158
Response Rate:	80%

	Count	Percent of Question Respondents
How do you expect the number of staff to change, if at all over the next 3 years?: Part time		
Increased	196	34.88%
Stayed the same	334	59.43%
Decreased	32	5.69%
Total	562	

Survey Participants:	795
Question Respondents:	562
No Response Count:	233
Response Rate:	71%

	Count	Percent of Question Respondents
How do you expect the number of staff to change, if at all over the next 3 years?: Casual		
Increased	87	20.76%
Stayed the same	316	75.42%
Decreased	16	3.82%
Total	419	

Survey Participants:	795
Question Respondents:	419
No Response Count:	376
Response Rate:	53%

	Count	Percent of Question Respondents
Describe the majority of essential personnel at this location		
Less than 25	54	8.13%
26 - 34	158	23.80%
35 - 49	313	47.14%
50 or older	139	20.93%
Total	664	

Survey Participants:	795
Question Respondents:	664
No Response Count:	131
Response Rate:	84%

WAGES

	Count	Percent of Question Respondents
Describe the wage scale here compared to all other firms locally		
Lower than	57	10.31%
Same as	295	53.35%
Greater than	201	36.35%
Total	553	

Survey Participants:	795
Question Respondents:	553
No Response Count:	242
Response Rate:	70%

	Count	Percent of Question Respondents
Average hourly wage: Skilled/Professional		
Under $10	15	3.23%
$10-$12.99	32	6.90%
$13-$14.99	20	4.31%
$15-$19.99	73	15.73%
$20-$29.99	152	32.76%
$30-49.99	126	27.16%
$50-$99	39	8.41%
$100 or more	7	1.51%
Total	464	

Survey Participants:	795
Question Respondents:	464
No Response Count:	331
Response Rate:	58%

	Count	Percent of Question Respondents
Average hourly wage: Semi-skilled		
Under $10	24	6.47%
$10-$12.99	77	20.75%
$13-$14.99	43	11.59%
$15-$19.99	105	28.30%
$20-$29.99	104	28.03%
$30-49.99	17	4.58%
$100 or more	1	0.27%
Total	371	

Survey Participants: 795

Question Respondents: 371

No Response Count: 424

Response Rate: 47%

	Count	Percent of Question Respondents
Average hourly wage: Entry-level		
Under $10	39	13.45%
$10-$12.99	146	50.34%
$13-$14.99	30	10.34%
$15-$19.99	46	15.86%
$20-$29.99	26	8.97%
$30-49.99	3	1.03%
Total	290	

Survey Participants: 795

Question Respondents: 290

No Response Count: 505

Response Rate: 36%

Recruitment

	Count	Percent of Question Respondents
Is the number of unfilled positions		
Stable	462	82.50%
Decreasing	24	4.29%
Increasing	74	13.21%
Total	560	

Survey Participants:	795
Question Respondents:	560
No Response Count:	235
Response Rate:	70%

	Count	Percent of Question Respondents
Where does the company attract the majority of its workers from?		
Internationally	11	1.53%
Nationally	32	4.46%
Provincially	36	5.02%
Locally	638	88.98%
Total	717	

Survey Participants:	795
Question Respondents:	717
No Response Count:	78
Response Rate:	90%

	Count	Percent of Question Respondents
Is the company experiencing recruitment problems with any employee positions or skills?		
Yes	317	45.68%
No	377	54.32%
Total	694	

Survey Participants:	795
Question Respondents:	694
No Response Count:	101
Response Rate:	87%

	Count	Percent of Question Respondents
Is the company experiencing recruitment problems with any employee positions or skills?: If *Yes*, in which category(s)?		
Assembler/Line Workers	1	0.32%
Advanced Mfg Workers	2	0.64%
Manufacturing/Other	4	1.28%
Agriculture/Farming	5	1.60%
Healthcare Professionals	5	1.60%
Marketing	5	1.60%
CDL Drivers	6	1.92%
Plant Managers / Operators	6	1.92%
Graphics Arts/Printing	7	2.24%
Machinists	9	2.88%
Material/Fabricators	11	3.53%
Maintenance	14	4.49%
Construction/Contractors	16	5.13%
Prof/Info Tech/Programming	16	5.13%
Electrical/Electronics	22	7.05%
Hospitality Service	24	7.69%
Machine Operators	25	8.01%
Administrative/Clerical	28	8.97%

	Count	Percent of Question Respondents
Is the company experiencing recruitment problems with any employee positions or skills?: If *Yes*, in which category(s)?		
General Laborer	29	9.29%
Mechanics	30	9.62%
Food/Beverage Service	32	10.26%
Professional/Other	37	11.86%
Professional/Technical	39	12.50%
Sales/Service	42	13.46%
Sales/Retail	43	13.78%
None	2	0.64%
Other	190	60.90%
Total	650	

Survey Participants:	795
Question Respondents:	312
No Response Count:	5
Parent Question 'Yes' Respondents:	317
Parent Question Respondents:	694
Response Rate:	98%

	Count	Percent of Question Respondents
Is the company experiencing recruitment problems with any employee positions or skills?: Other (specify job roles/titles)		
Accountants	1	0.32%
Actuarials	1	0.32%
Audiologists	1	0.32%
Bartenders	1	0.32%
Cooks	1	0.32%
Custodians	1	0.32%
Fitness instructors	1	0.32%
Funeral director	1	0.32%
HVAC	1	0.32%

	Count	Percent of Question Respondents
Is the company experiencing recruitment problems with any employee positions or skills?: Other (specify job roles/titles)		
Insurance brokers	1	0.32%
Labourers	1	0.32%
Licensed broker	1	0.32%
Nutritionist	1	0.32%
Realtors	1	0.32%
Social service workers	1	0.32%
Statisticians	1	0.32%
Students	1	0.32%
Surveyors	1	0.32%
Teachers	1	0.32%
Yoga Instructors	1	0.32%
Chefs & Bakers	2	0.64%
Chemists	2	0.64%
Computer-aided design (CAD) technologists	2	0.64%
Interior designers	2	0.64%
Lawyers	2	0.64%
Marketing professionals	2	0.64%
Pharmacists	2	0.64%
Bookkeepers	3	0.96%
Customer service representatives	3	0.96%
Good employee	3	0.96%
Horticulturists	3	0.96%
Sales	3	0.96%
System administrators	3	0.96%
Commercial drivers	4	1.28%
Cosmetologist	4	1.28%
Creative Writers	4	1.28%
Hair Stylists	5	1.60%
Housekeeping	5	1.60%

	Count	Percent of Question Respondents
Is the company experiencing recruitment problems with any employee positions or skills?: Other (specify job roles/titles)		
Machine operators	6	1.92%
Web designers	6	1.92%
Computer technologists	7	2.24%
Engineers	8	2.56%
Software developers	9	2.88%
Managers	22	7.05%
Skilled trades	29	9.29%
Total	161	

Survey Participants:	795
Question Respondents:	167
No Response Count:	23
Parent Question 'Other' Respondents:	190
Parent Question Respondents:	312
Response Rate:	88%

	Count	Percent of Question Respondents
Do you anticipate future recruiting difficulties i.e. 3-5 year?		
Yes	350	51.55%
No	329	48.45%
Total	679	

Survey Participants:	795
Question Respondents:	679
No Response Count:	116
Response Rate:	85%

	Count	Percent of Question Respondents
Do you anticipate future recruiting difficulties i.e. 3-5 year? : If *Yes*, in what area(s)?		
Advanced Mfg Workers	1	0.31%
Assembler/Line Workers	1	0.31%
Manufacturing/Other	3	0.92%
Agriculture/Farming	6	1.84%
CDL Drivers	6	1.84%
Plant Managers/Operators	6	1.84%
Healthcare Professionals	7	2.15%
Marketing	7	2.15%
Graphics Arts/Printing	9	2.76%
Material/Fabricators	10	3.07%
Construction/Contractors	13	3.99%
Machinists	13	3.99%
Electrical/Electronics	15	4.60%
Maintenance	15	4.60%
Hospitality Service	19	5.83%
Machine Operators	20	6.13%
Prof/Info Tech/Programming	20	6.13%
Administrative/Clerical	30	9.20%
General Laborer	30	9.20%
Food/Beverage Service	32	9.82%
Professional/Other	37	11.35%
Professional/Technical	38	11.66%
Sales/Service	38	11.66%
Mechanics	42	12.88%
Sales/Retail	42	12.88%
None	1	0.31%
Other	184	56.44%
Total	645	

Survey Participants:	795
Question Respondents:	326
No Response Count:	24
Parent Question 'Yes' Respondents:	350
Parent Question Respondents:	679
Response Rate:	93%

	Count	Percent of Question Respondents
Do you anticipate future recruiting difficulties i.e. 3-5 year? : Other (specify job roles/titles)		
Actuarial	1	0.31%
Arbourist	1	0.31%
Audiologists	1	0.31%
Chemists	1	0.31%
Cooks	1	0.31%
Cosmetologists	1	0.31%
Counselors for boys	1	0.31%
Custodians	1	0.31%
Educators	1	0.31%
Executives	1	0.31%
Farmers	1	0.31%
General Laborer	1	0.31%
Healthcare Professionals	1	0.31%
Heavy Equipment Operators	1	0.31%
Insurance Brokers	1	0.31%
Interior designers	1	0.31%
Jewelers	1	0.31%
Licensed brokers	1	0.31%
Realtors	1	0.31%
Reporters	1	0.31%
River guides	1	0.31%
Seed agrologist	1	0.31%
Servers	1	0.31%
Statisticians	1	0.31%
Surveyors	1	0.31%
Washers	1	0.31%
Yard Technicians	1	0.31%
Apprentices	2	0.61%
Business Adminstration	2	0.61%

	Count	Percent of Question Respondents
Do you anticipate future recruiting difficulties i.e. 3-5 year? : Other (specify job roles/titles)		
Butchers	2	0.61%
Cosmetologist	2	0.61%
Lawyers	2	0.61%
Sales	2	0.61%
Skilled professional	2	0.61%
Bakers	3	0.92%
Bookkeepers	3	0.92%
General laborer	3	0.92%
Hair stylists	3	0.92%
Journalists	3	0.92%
Pharmacists	3	0.92%
Accountants	4	1.23%
Housekeeping	5	1.53%
Commercial Truck Drivers	6	1.84%
Engineers	10	3.07%
Managers	12	3.68%
Computer professionals	19	5.83%
Skilled trades	27	8.28%
Total	142	

Survey Participants:	795
Question Respondents:	158
No Response Count:	26
Parent Question 'Other' Respondents:	184
Parent Question Respondents:	326
Response Rate:	86%

	Count	Percent of Question Respondents
If applicable, please describe any recruitment activities or strategies you have undertaken to attract employees.		
Job Fairs	1	0.34%
Offer apprenticeships	1	0.34%
Paid Referral Program	1	0.34%
Selling on lifestyle	1	0.34%
Advertising	2	0.68%
Online job boards	2	0.68%
Flexible work schedule	3	1.02%
National advertising	3	1.02%
Recruitng Firms	3	1.02%
Training opportunities	3	1.02%
Internal job postings	4	1.37%
Recruiting Firms	4	1.37%
Staff discounts	4	1.37%
Canada Job Bank	5	1.71%
Job fairs	5	1.71%
Offer benefits/bonuses	5	1.71%
International recruitment	6	2.05%
Road side sign	6	2.05%
Trade Journals	6	2.05%
Employment agencies	7	2.39%
WorkBC	8	2.73%
Post openings on company website	9	3.07%
Online advertising	14	4.78%
Social media (Facebook/ Linkedin)	14	4.78%
College recruitment	19	6.48%
Online Job boards	31	10.58%
Local advertising	63	21.50%
Word of mouth	90	30.72%
None	56	19.11%

	Count	Percent of Question Respondents
If applicable, please describe any recruitment activities or strategies you have undertaken to attract employees.		
Total	376	

Survey Participants:	609
Question Respondents:	293
No Response Count:	316
Response Rate:	48%

	Count	Percent of Question Respondents
Is there anything we can do to help overcome issues with employee recruitment?		
Yes	57	38.00%
No	93	62.00%
Total	150	

Survey Participants:	795
Question Respondents:	150
No Response Count:	645
Response Rate:	19%

	Count	Percent of Question Respondents
Is there anything we can do to help overcome issues with employee recruitment?: If *Yes*, please explain		
Attract talented people	1	2.50%
Improve health care and hospital services	1	2.50%
Provide a good connection to universities and summer students	1	2.50%
Provide better job preparation	1	2.50%
Provide other fulltime employment	1	2.50%
Provide relocation assistance	1	2.50%
Sponsor job fairs	1	2.50%
Provide a better community for families	2	5.00%

	Count	Percent of Question Respondents
Is there anything we can do to help overcome issues with employee recruitment?: If *Yes*, please explain		
Subsidize wages	2	5.00%
Bring cost of living down	3	7.50%
Support affordable housing	3	7.50%
Help with foreign worker program	4	10.00%
Provide training support	7	17.50%
Establish a job bank	11	27.50%
Total	39	

Survey Participants:	795
Question Respondents:	40
No Response Count:	17
Parent Question 'Yes' Respondents:	57
Parent Question Respondents:	150
Response Rate:	70%

RETENTION

	Count	Percent of Question Respondents
Is employee retention a problem?		
Yes	209	30.60%
No	474	69.40%
Total	683	

Survey Participants:	795
Question Respondents:	683
No Response Count:	112
Response Rate:	86%

	Count	Percent of Question Respondents
If applicable, please describe any challenges and / or efforts you have undertaken to retain employees.		
Apprentice training	1	0.35%
Child Care	3	1.06%
Profit sharing	7	2.48%
Subsidized housing	8	2.84%
Avoid layoffs (find extra work)	13	4.61%
Training	19	6.74%
Staff discounts	20	7.09%
Support personal growth and skill development	34	12.06%
Bonuses	44	15.60%
Flexible work schedule	51	18.09%
Support a positve environment	57	20.21%
Benefits	58	20.57%
Competitive wages	68	24.11%
None	39	13.83%
Total	422	

Survey Participants:	609
Question Respondents:	282
No Response Count:	327

	Count	Percent of Question Respondents
If applicable, please describe any challenges and / or efforts you have undertaken to retain employees.		

Response Rate: 46%

Skills and Training

	Count	Percent of Question Respondents
Skill Level of Majority of Workforce		
Skilled/Professional	368	55.26%
Semi-skilled	113	16.97%
Entry-level	49	7.36%
Total	530	

Survey Participants: 795

Question Respondents: 666

Response Rate: 83.77%

	Count	Percent of Question Respondents
Percent of workforce: Skilled/Professional		
less than 25%	137	20.57%
25 to 49%	93	13.96%
50 to 74%	110	16.52%
75 to 100%	326	48.95%
Total	666	

Survey Participants: 795

Question Respondents: 666

No Response Count: 129

Response Rate: 84%

	Count	Percent of Question Respondents
Percent of workforce: Semi-skilled		
less than 25%	382	57.36%
25 to 49%	122	18.32%
50 to 74%	95	14.26%
75 to 100%	67	10.06%
Total	666	

Survey Participants:	795
Question Respondents:	666
No Response Count:	129
Response Rate:	84%

	Count	Percent of Question Respondents
Percent of workforce: Entry-level		
less than 25%	518	77.78%
25 to 49%	65	9.76%
50 to 74%	53	7.96%
75 to 100%	30	4.50%
Total	666	

Survey Participants:	795
Question Respondents:	666
No Response Count:	129
Response Rate:	84%

	Count	Percent of Question Respondents
Does the company provide a training budget in order to upgrade employee's skills?		
Yes	358	53.12%
No	316	46.88%
Total	674	

Survey Participants:	795
Question Respondents:	674
No Response Count:	121
Response Rate:	85%

	Count	Percent of Question Respondents
Does the company offer in-house training?		
Yes	135	84.91%
No	24	15.09%
Total	159	

Survey Participants:	795
Question Respondents:	159
No Response Count:	636
Response Rate:	20%

	Count	Percent of Question Respondents
Does the company use Contracted Training?		
Yes	61	38.85%
No	96	61.15%
Total	157	

Survey Participants:	795
Question Respondents:	157
No Response Count:	638
Response Rate:	20%

	Count	Percent of Question Respondents
Are there any areas of training or professional development that would be of benefit to you or your employees?		
Yes	494	71.80%
No	194	28.20%
Total	688	

Survey Participants:	795
Question Respondents:	688
No Response Count:	107
Response Rate:	87%

	Count	Percent of Question Respondents
Are there any areas of training or professional development that would be of benefit to you or your employees?: If Yes, what are they?		
Barista	1	0.21%
Environmental programs	1	0.21%
Horiculture	1	0.21%
Professional development	4	0.82%
Continued education	6	1.23%
Cooking skills	7	1.44%
Emerging technologies	19	3.91%
Managerial training	24	4.94%
Social media	24	4.94%
Industrial equipment operations	31	6.38%
Web site design	36	7.41%
Computer skills	49	10.08%
Accounting/Bookeeping	50	10.29%
Emerging industry practices	55	11.32%
Customer service	60	12.35%
Technical training	61	12.55%
Business management	70	14.40%

	Count	Percent of Question Respondents
Are there any areas of training or professional development that would be of benefit to you or your employees?: If Yes, what are they?		
Sales/Marketing	72	14.81%
Safety/First Aid/Food Safe	76	15.64%
Total	647	

Survey Participants:	795
Question Respondents:	486
No Response Count:	8
Parent Question 'Yes' Respondents:	494
Parent Question Respondents:	688
Response Rate:	98%

	Count	Percent of Question Respondents
When your staff attend training/certification, where do they usually access the training?		
United States	72	12.10%
Rest of Canada	105	17.65%
Regional	158	26.55%
British Columbia	223	37.48%
Local	309	51.93%
Total	867	

Survey Participants:	795
Question Respondents:	595
No Response Count:	200
Response Rate:	75%

	Count	Percent of Question Respondents
What modes of education/training work best for you?		
Individual coaching	312	48.90%
Online/ Webinar training	332	52.04%
Classroom	350	54.86%
Other	97	15.20%
Total	1091	

Survey Participants:	795
Question Respondents:	638
No Response Count:	157
Response Rate:	80%

	Count	Percent of Question Respondents
What modes of education/training work best for you?: Other Name		
Mentor	6	0.94%
Trade shows / Conferences	35	5.49%
In-house / Hands on / Workshop	56	8.78%
Total	97	

Survey Participants:	795
Question Respondents:	97
No Response Count:	0
Parent Question 'Other' Respondents:	97
Parent Question Respondents:	638
Response Rate:	100%

	Count	Percent of Question Respondents
Are you aware of any anticipated trends, technologies, significant changes that will be occurring in your industry that will require new skills?		
Yes	340	51.52%
No	320	48.48%
Total	660	

Survey Participants:	795
Question Respondents:	660
No Response Count:	135
Response Rate:	83%

	Count	Percent of Question Respondents
What new training might you need to consider in the next five years?		
Accounting/Bookeeping	1	1.04%
Airbrushing	1	1.04%
Automated steel fabrication	1	1.04%
Business communications	1	1.04%
Civil engineering	1	1.04%
Customer service	1	1.04%
Data analytics	1	1.04%
Government regulations	1	1.04%
Hand-held technology	1	1.04%
Heavy equipment technologies	1	1.04%
Landscape design	1	1.04%
Marketing	1	1.04%
Online payment systems	1	1.04%
Pharmacology	1	1.04%
Plant Science	1	1.04%
Plumbing	1	1.04%
Prepared food training	1	1.04%

	Count	Percent of Question Respondents
What new training might you need to consider in the next five years?		
Robotics	1	1.04%
Safety	1	1.04%
Sales	1	1.04%
Social media communications	1	1.04%
Specialized health services	1	1.04%
Stained glass soldering	1	1.04%
Water management.	1	1.04%
Bookkeeping	2	2.08%
Food Safe	2	2.08%
HVAC	2	2.08%
Webisite design	2	2.08%
Emerging industry practices	3	3.12%
Social Media	3	3.12%
Electronics	4	4.17%
Social media marketing	4	4.17%
Solar technologies	5	5.21%
Computer and technology training	8	8.33%
Technology Skills	8	8.33%
Online marketing	12	12.50%
Emerging technologies	14	14.58%
Total	93	

Survey Participants:	795
Question Respondents:	96
No Response Count:	699
Response Rate:	12%

Unions

	Count	Percent of Question Respondents
Union status		
Yes	40	5.95%
No	504	75.00%
Not applicable	128	19.05%
Total	672	

Survey Participants: 795

Question Respondents: 672

No Response Count: 123

Response Rate: 85%

Employees

	Count	Percent of Question Respondents
In general terms, what percent of your workforce lives in the: Community (%)		
0-24%	12	2.48%
25-49%	9	1.86%
50-74%	39	8.06%
75-100%	424	87.60%
Total	484	

Survey Participants: 609

Question Respondents: 484

No Response Count: 125

Response Rate: 79%

	Count	Percent of Question Respondents
In general terms, what percent of your workforce lives in the: Region (%) - includes entire Columbia Basin-Boundary region		
0-24%	44	41.90%
25-49%	24	22.86%
50-74%	24	22.86%
75-100%	13	12.38%
Total	105	

Survey Participants:	609
Question Respondents:	105
No Response Count:	504
Response Rate:	17%

	Count	Percent of Question Respondents
In general terms, what percent of your workforce lives in the: Outside of region (%)		
0-24%	22	52.38%
25-49%	9	21.43%
50-74%	4	9.52%
75-100%	7	16.67%
Total	42	

Survey Participants:	609
Question Respondents:	42
No Response Count:	567
Response Rate:	7%

	Count	Percent of Question Respondents
Please indicate which issues you believe are critical to your employees?		
Transportation	118	26.28%
Child care	155	34.52%
Housing	230	51.22%
Cost of living	319	71.05%
Other	169	37.64%
Total	991	

Survey Participants:	609
Question Respondents:	449
No Response Count:	160
Response Rate:	74%

	Count	Percent of Question Respondents
Please indicate which issues you believe are critical to your employees?: If *Other*, please list any other issues		
Proximity to airport	1	0.22%
Seasonality of work	1	0.22%
Cost of living	2	0.45%
Cell phone service	3	0.67%
Job security	3	0.67%
Benefits	4	0.89%
Recreation amenities	4	0.89%
Training	4	0.89%
Child care	5	1.11%
Healthcare	5	1.11%
Healthy Work environment	5	1.11%
Seasonality of the work offered	5	1.11%
Double income opportunities	7	1.56%
Public transit	7	1.56%
Broadband service	8	1.78%

	Count	Percent of Question Respondents
Please indicate which issues you believe are critical to your employees?: If *Other*, please list any other issues		
Flextime	8	1.78%
Work environment	10	2.23%
Getting enough work hours	13	2.90%
Wages	19	4.23%
Affordable housing	24	5.35%
Lifestyle	31	6.90%
Total	169	

Survey Participants:	609
Question Respondents:	170
No Response Count:	0
Parent Question 'Other' Respondents:	169
Parent Question Respondents:	449
Response Rate:	100%

SALES

MARKET SIZE AND SHARE

	Count	Percent of Question Respondents
Annual sales at this facility (optional)		
Under $25,000	28	6.10%
$49,999 to $25,000	34	7.41%
$99,999 to $50,000	36	7.84%
499,999 to $100,000	147	32.03%
$999,999 to $500,000	67	14.60%
$4.9 million to 1 million	101	22.00%
$9.9 million to 5 million	19	4.14%
$19.9 million to 10 million	10	2.18%
$50 million to 20 million	11	2.40%
over $50 million	6	1.31%
Total	459	

Survey Participants:	795
Question Respondents:	459
No Response Count:	336
Response Rate:	58%

	Count	Percent of Question Respondents
Is the market for your product		
Stable	286	37.19%
Decreasing	73	9.49%
Increasing	410	53.32%
Total	769	

Survey Participants:	795
Question Respondents:	769
No Response Count:	26
Response Rate:	97%

	Count	Percent of Question Respondents
International trade status		
Export	73	11.44%
Import	77	12.07%
None	92	14.42%
Not applicable	425	66.61%
Total	667	

Survey Participants:	795
Question Respondents:	638
No Response Count:	157
Response Rate:	80 %

	Count	Percent of Question Respondents
Is the market share (compared to your competitors) of your company's products		
Stable	262	42.67%
Decreasing	41	6.68%
Increasing	311	50.65%
Total	614	

Survey Participants:	795
Question Respondents:	614
No Response Count:	181
Response Rate:	77%

GROWTH

	Count	Percent of Question Respondents
What is the projected sales growth in the next year at this business?		
Declining	21	3.03%
0%	89	12.84%
1 - 9%	249	35.93%
10 - 24%	199	28.72%
25 - 49%	66	9.52%
50 - 99%	42	6.06%
Over 100%	27	3.90%
Total	693	

Survey Participants:	795
Question Respondents:	693
No Response Count:	102
Response Rate:	87%

	Count	Percent of Question Respondents
Historical sales trend: At this business (past five years)		
Declining	92	12.87%
Staying the same	131	18.32%
Increasing	462	64.62%
Not applicable	30	4.20%
Total	715	

Survey Participants:	795
Question Respondents:	715
No Response Count:	80
Response Rate:	90%

	Count	Percent of Question Respondents
Historical sales trend: At the parent company		
Declining	15	2.68%
Staying the same	35	6.26%
Increasing	106	18.96%
Not applicable	403	72.09%
Total	559	

Survey Participants: 795
Question Respondents: 559
No Response Count: 236
Response Rate: 70%

	Count	Percent of Question Respondents
Historical sales trend: Within the industry		
Declining	106	16.67%
Staying the same	154	24.21%
Increasing	304	47.80%
Not applicable	72	11.32%
Total	636	

Survey Participants: 795
Question Respondents: 636
No Response Count: 159
Response Rate: 80%

	Count	Percent of Question Respondents
Historical export sales trend		
Declining	22	3.98%
Staying the same	24	4.34%
Increasing	64	11.57%
Not applicable	443	80.11%
Total	553	

Survey Participants: 795
Question Respondents: 553
No Response Count: 242
Response Rate: 70%

Source of Sales

	Count	Percent of Question Respondents
Source of Majority of Sales		
Local	505	69.08%
Provincial	43	5.88%
National	42	5.75%
United States	13	1.78%
International	13	1.78%
Total	616	

Survey Participants:	795
Question Respondents:	731
Response Rate:	91.95 %

	Count	Percent of Question Respondents
Please identify the source of your sales by percentage: Local / Regional		
0%	62	8.48%
1-9%	31	4.24%
10-19%	43	5.88%
20-29%	30	4.10%
30-39%	19	2.60%
40-49%	11	1.50%
50-59%	30	4.10%
60-69%	35	4.79%
70-79%	44	6.02%
80-89%	50	6.84%
90-99%	92	12.59%
100%	284	38.85%
Total	731	

Survey Participants:	795
Question Respondents:	731
No Response Count:	64
Response Rate:	92%

	Count	Percent of Question Respondents
Please identify the source of your sales by percentage: Provincial		
0%	365	49.93%
1-9%	80	10.94%
10-19%	96	13.13%
20-29%	74	10.12%
30-39%	34	4.65%
40-49%	22	3.01%
50-59%	17	2.33%
60-69%	5	0.68%
70-79%	13	1.78%
80-89%	12	1.64%
90-99%	8	1.09%
100%	5	0.68%
Total	731	

Survey Participants:	795
Question Respondents:	731
No Response Count:	64
Response Rate:	92%

	Count	Percent of Question Respondents
Please identify the source of your sales by percentage: National		
0%	448	61.29%
1-9%	61	8.34%
10-19%	80	10.94%
20-29%	40	5.47%
30-39%	22	3.01%
40-49%	17	2.33%
50-59%	27	3.69%

	Count	Percent of Question Respondents
Please identify the source of your sales by percentage: National		
60-69%	12	1.64%
70-79%	8	1.09%
80-89%	7	0.96%
90-99%	4	0.55%
100%	5	0.68%
Total	731	

Survey Participants:	795
Question Respondents:	731
No Response Count:	64
Response Rate:	92%

	Count	Percent of Question Respondents
Please identify the source of your sales by percentage: United States		
0%	559	76.47%
1-9%	70	9.58%
10-19%	47	6.43%
20-29%	22	3.01%
30-39%	12	1.64%
40-49%	3	0.41%
50-59%	5	0.68%
60-69%	1	0.14%
70-79%	6	0.82%
80-89%	3	0.41%
90-99%	3	0.41%
Total	731	

Survey Participants:	795
Question Respondents:	731
No Response Count:	64
Response Rate:	92%

	Count	Percent of Question Respondents
Please identify the source of your sales by percentage: International		
0%	569	77.84%
1-9%	66	9.03%
10-19%	41	5.61%
20-29%	20	2.74%
30-39%	8	1.09%
40-49%	6	0.82%
50-59%	8	1.09%
60-69%	4	0.55%
70-79%	3	0.41%
80-89%	1	0.14%
90-99%	5	0.68%
Total	731	

Survey Participants:	795
Question Respondents:	731
No Response Count:	64
Response Rate:	92%

	Count	Percent of Question Respondents
Percent of total sales generated by top 3 customers		
1 - 9%	12	26.67%
10 - 25%	6	13.33%
26 - 50%	4	8.89%
51 - 75%	4	8.89%
76 - 100%	19	42.22%
Total	45	

Survey Participants:	609
Question Respondents:	45
No Response Count:	564
Response Rate:	7%

	Count	Percent of Question Respondents
Do you supply your products or services to any company in the community or region?		
Yes	110	72.85%
No	41	27.15%
Total	151	

Survey Participants:	795
Question Respondents:	151
No Response Count:	644
Response Rate:	19%

Source of Supplies

	Count	Percent of Question Respondents
Source of Majority of Supplies		
Local	206	29.18%
Provincial	162	22.95%
National	113	16.01%
United States	38	5.38%
International	31	4.39%
Total	550	

Survey Participants:	795
Question Respondents:	706
Response Rate:	88.81 %

	Count	Percent of Question Respondents
Please identify the source of your supplies by percentage: Local / Regional		
0%	225	31.87%
1-9%	56	7.93%
10-19%	65	9.21%
20-29%	56	7.93%
30-39%	26	3.68%
40-49%	20	2.83%
50-59%	52	7.37%
60-69%	19	2.69%
70-79%	25	3.54%
80-89%	29	4.11%
90-99%	41	5.81%
100%	92	13.03%
Total	706	

Survey Participants:	795
Question Respondents:	706
No Response Count:	89
Response Rate:	89%

	Count	Percent of Question Respondents
Please identify the source of your supplies by percentage: Provincial		
0%	303	42.92%
1-9%	23	3.26%
10-19%	57	8.07%
20-29%	60	8.50%
30-39%	32	4.53%
40-49%	22	3.12%
50-59%	49	6.94%
60-69%	19	2.69%

	Count	Percent of Question Respondents
Please identify the source of your supplies by percentage: Provincial		
70-79%	33	4.67%
80-89%	34	4.82%
90-99%	36	5.10%
100%	38	5.38%
Total	706	

Survey Participants:	795
Question Respondents:	706
No Response Count:	89
Response Rate:	89%

	Count	Percent of Question Respondents
Please identify the source of your supplies by percentage: National		
0%	349	49.43%
1-9%	33	4.67%
10-19%	54	7.65%
20-29%	62	8.78%
30-39%	27	3.82%
40-49%	25	3.54%
50-59%	47	6.66%
60-69%	16	2.27%
70-79%	21	2.97%
80-89%	19	2.69%
90-99%	22	3.12%
100%	31	4.39%
Total	706	

Survey Participants:	795
Question Respondents:	706
No Response Count:	89
Response Rate:	89%

	Count	Percent of Question Respondents
Please identify the source of your supplies by percentage: United States		
0%	502	71.10%
1-9%	33	4.67%
10-19%	55	7.79%
20-29%	33	4.67%
30-39%	15	2.12%
40-49%	8	1.13%
50-59%	22	3.12%
60-69%	3	0.42%
70-79%	8	1.13%
80-89%	11	1.56%
90-99%	7	0.99%
100%	9	1.27%
Total	706	

Survey Participants:	795
Question Respondents:	706
No Response Count:	89
Response Rate:	89%

	Count	Percent of Question Respondents
Please identify the source of your supplies by percentage: International		
0%	603	85.41%
1-9%	29	4.11%
10-19%	11	1.56%
20-29%	14	1.98%
30-39%	5	0.71%
40-49%	2	0.28%
50-59%	12	1.70%

	Count	Percent of Question Respondents
Please identify the source of your supplies by percentage: International		
60-69%	2	0.28%
70-79%	7	0.99%
80-89%	7	0.99%
90-99%	5	0.71%
100%	9	1.27%
Total	706	

Survey Participants:	795
Question Respondents:	706
No Response Count:	89
Response Rate:	89%

PROCUREMENT

	Count	Percent of Question Respondents
Do you engage in government procurement?		
Yes	70	29.54%
No	167	70.46%
Total	237	

Survey Participants:	609
Question Respondents:	237
No Response Count:	372
Response Rate:	39%

PURCHASING

	Count	Percent of Question Respondents
What products or services, if any, are you purchasing from outside the area for which you would like to have a local supplier?		
Beeswax	1	0.45%
Chemicals (Methanol ...)	1	0.45%
Childrens Toys	1	0.45%
Equipment operators	1	0.45%
Fiber optic services	1	0.45%
Graphite	1	0.45%
House hold items	1	0.45%
Medical supplies	1	0.45%
Micro-hydro equipment	1	0.45%
Recreational equipment	1	0.45%
Restaurant equipment servicing	1	0.45%
Safety equipment	1	0.45%
Soap making materials	1	0.45%
Spices	1	0.45%
Steel	1	0.45%
Survey equipment and supplies	1	0.45%
Tools	1	0.45%
Tour services	1	0.45%
Water	1	0.45%
Wood products	1	0.45%
Artisan products	2	0.90%
Metal working services	2	0.90%
Office furniture	2	0.90%
Woodworking services	2	0.90%
Arts and crafts	3	1.35%
Hair supplies	3	1.35%
Printing services	3	1.35%
Wholesale services	3	1.35%

	Count	Percent of Question Respondents
What products or services, if any, are you purchasing from outside the area for which you would like to have a local supplier?		
Packaging services	4	1.80%
Electronics	5	2.25%
Web hosting	5	2.25%
Gardening supplies and equipment	6	2.70%
Automotive parts & equipment	7	3.15%
Bedding / Linens	7	3.15%
Construction materials	8	3.60%
Office supplies	12	5.41%
Meats & Dairy / Fruits and Vegetables / Grains	16	7.21%
Computers / Software	25	11.26%
Total	135	

Survey Participants:	609
Question Respondents:	222
No Response Count:	387
Response Rate:	36%

	Count	Percent of Question Respondents
If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area?		
Loyalty to current supplier	11	2.83%
Long term contract with outside supplier	16	4.11%
No control	16	4.11%
Unaware of local venders	16	4.11%
head office decision	16	4.11%
No applicable to this business	21	5.40%
Quality of available products	43	11.05%
Higher costs locally	117	30.08%
Product not available here	327	84.06%

	Count	Percent of Question Respondents
If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area?		
Other	31	7.97%
Total	614	

Survey Participants:	609
Question Respondents:	389
No Response Count:	220
Response Rate:	64%

PURCHASING

	Count	Percent of Question Respondents
If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area?: If *Other*, specify		
Are willing to pay more if local	1	0.26%
Bottling supplies	1	0.26%
Bulk purchase not available here	1	0.26%
Not available locally	1	0.26%
Poor customer service	1	0.26%
Product is too specialized	1	0.26%
Products are manufactured outside of area	1	0.26%
Seattle Best decision	1	0.26%
Supplied by HQ	1	0.26%
Supplies are centrally located in large centers ie Vancouver	1	0.26%
Supply	1	0.26%
The local suppliers often do not have enough product or do not meet the strict guidelines required to sell their products within our stores.	1	0.26%
Very specialised casting and foundry products	1	0.26%
artisan listings (see company notes)	1	0.26%
availability of fresh produce is seasonal.	1	0.26%
because of franchise some of the supplies are on long term contracts	1	0.26%
corporate directions	1	0.26%
economy of scale: not enough demand to warrant setting up.	1	0.26%
for the convience store side of our business where possible we purchase locally ie: bakery goods.	1	0.26%
has hired someone to source local herbs	1	0.26%
less expensive in USA	1	0.26%
name brand knowledge required of bigger brands	1	0.26%
no wholesalers specific to electronics in the area	1	0.26%
people source local manufactures at store and then go to the local manufacture	1	0.26%

	Count	Percent of Question Respondents
If majority of products/services are being purchased from outside of the area, why are they NOT being purchased from within the area?: If *Other*, specify		
regulations	1	0.26%
restricted by franchise	1	0.26%
these are for a small amount of suppliers	1	0.26%
would purchase more locally if available and cost effective	1	0.26%
Total	28	

Survey Participants:	609
Question Respondents:	28
No Response Count:	3
Parent Question 'Other' Respondents:	31
Parent Question Respondents:	389
Response Rate:	90%

Facilities and Equipment

Size and Condition

	Count	Percent of Question Respondents
What is the square footage of your current facility?: sq/ft		
less than 1,000 sq ft	172	27.79%
1,000-4,999 sq ft	265	42.81%
5,000-9,999 sq ft	80	12.92%
10,000-19,999 sq ft	44	7.11%
20,000 sq ft or more	58	9.37%
Total	619	

Survey Participants:	795
Question Respondents:	619
No Response Count:	176
Response Rate:	78%

	Count	Percent of Question Respondents
Condition of facility		
Excellent	213	31.23%
Good	327	47.95%
Fair	122	17.89%
Poor	20	2.93%
Total	682	

Survey Participants:	795
Question Respondents:	682
No Response Count:	113
Response Rate:	86%

	Count	Percent of Question Respondents
Condition of equipment		
Excellent	238	34.95%
Good	360	52.86%
Fair	74	10.87%
Poor	9	1.32%
Total	681	

Survey Participants:	795
Question Respondents:	681
No Response Count:	114
Response Rate:	86%

OWNERSHIP

	Count	Percent of Question Respondents
Status of facility		
Leased	290	39.30%
Owned	448	60.70%
Total	738	

Survey Participants:	795
Question Respondents:	738
No Response Count:	57
Response Rate:	93%

	Count	Percent of Question Respondents
Status of facility: If *Leased*, what is the length of term remaining		
<1 Year	101	44.30%
1 - 2 Years	43	18.86%
3 - 5 Years	50	21.93%
> 5 Years	33	14.47%
Total	227	

Survey Participants:	795
Question Respondents:	228
No Response Count:	62
Parent Question 'Leased' Respondents:	290
Parent Question Respondents:	738
Response Rate:	79%

	Count	Percent of Question Respondents
Are you planning on renewing current lease?		
Yes	251	82.84%
No	52	17.16%
Total	303	

Survey Participants:	795
Question Respondents:	303
No Response Count:	492
Response Rate:	38%

	Count	Percent of Question Respondents
Are you planning on renewing current lease?: If *No*, why not		
Building condition	1	2.27%
Business for sale	1	2.27%
Buyout possible	1	2.27%
Change in business focus	1	2.27%
Considering alternatives	1	2.27%
Declining business	1	2.27%
Facility has been sold	1	2.27%
Landlord issues	1	2.27%
Poor maintenance	1	2.27%
Retiring	1	2.27%
Sold business	1	2.27%
Building a facility	3	6.82%
Business expanding	3	6.82%
Not sure	3	6.82%
Moving to new location	5	11.36%
Seeking larger building	5	11.36%
Purchasing a facility	9	20.45%
Total	39	

Survey Participants:	795
Question Respondents:	44
No Response Count:	8
Parent Question 'No' Respondents:	52
Parent Question Respondents:	303
Response Rate:	85%

	Count	Percent of Question Respondents
Do you have a preference of lease vs own?		
Lease	31	23.85%
Own	99	76.15%
Total	130	

Survey Participants: 795

Question Respondents: 130

No Response Count: 665

Response Rate: 16%

Expansion

	Count	Percent of Question Respondents
Historical investment trends: Over past 18 months in the *facility*		
Declining	49	8.17%
Staying the same	299	49.83%
Increasing	252	42.00%
Total	600	

Survey Participants: 795

Question Respondents: 600

No Response Count: 195

Response Rate: 75%

	Count	Percent of Question Respondents
Is there room for expansion at this site?		
Yes	358	54.41%
No	242	36.78%
Maybe	58	8.81%
Total	658	

Survey Participants: 795

Question Respondents: 658

No Response Count: 137

Response Rate: 83%

	Count	Percent of Question Respondents
Does the company plan to expand in the next three years?		
Yes	361	48.78%
No	379	51.22%
Total	740	

Survey Participants:	795
Question Respondents:	740
No Response Count:	55
Response Rate:	93%

	Count	Percent of Question Respondents
Does the company plan to expand in the next three years?: Will it be in this community?		
Yes	304	86.12%
No	32	9.07%
Total	336	

Survey Participants:	795
Question Respondents:	353
No Response Count:	8
Parent Question 'Yes' Respondents:	361
Parent Question Respondents:	740
Response Rate:	98%

	Count	Percent of Question Respondents
Does the company plan to expand in the next three years?: Is your current site adequate for the proposed expansion?		
Yes	227	65.61%
No	111	32.08%
Total	338	

Survey Participants:	795
Question Respondents:	346
No Response Count:	15
Parent Question 'Yes' Respondents:	361
Parent Question Respondents:	740
Response Rate:	96%

	Count	Percent of Question Respondents
Does the company plan to expand in the next three years?: Estimated total investment		
Less than $25,000	49	26.20%
$25,000-$99,999	37	19.79%
$100,000-$499,999	45	24.06%
$500,000-$999,999	14	7.49%
$1-$4.9 million	27	14.44%
$5-$9.9 million	2	1.07%
$10-19.9 million	3	1.60%
$20 million and over	10	5.35%
Total	187	

Survey Participants:	795
Question Respondents:	187
No Response Count:	174
Parent Question 'Yes' Respondents:	361
Parent Question Respondents:	740
Response Rate:	52%

	Count	Percent of Question Respondents
Does the company plan to expand in the next three years?: Approximate percentage equipment/technology		
0%	5	2.94%
Under 50%	47	27.65%
50 to 99%	52	30.59%
100%	66	38.82%
Total	170	

Survey Participants:	795
Question Respondents:	170
No Response Count:	191
Parent Question 'Yes' Respondents:	361
Parent Question Respondents:	740
Response Rate:	47%

	Count	Percent of Question Respondents
Does the company plan to expand in the next three years?: Approximate percentage real estate		
0%	26	19.12%
Under 50%	25	18.38%
50 to 99%	61	44.85%
100%	24	17.65%
Total	136	

Survey Participants:	795
Question Respondents:	136
No Response Count:	225
Parent Question 'Yes' Respondents:	361
Parent Question Respondents:	740
Response Rate:	38%

	Count	Percent of Question Respondents
Does the company plan to expand in the next three years?: Estimated facility size increase (sq/ft)		
Less than 1,000 sq ft	56	41.48%
1,000 to 4,999 sq ft	53	39.26%
5,000-9,999 sq ft	14	10.37%
10,000-19,999 sq ft	4	2.96%
20,000 sq ft or more	8	5.93%
Total	135	

Survey Participants:	795
Question Respondents:	135
No Response Count:	226
Parent Question 'Yes' Respondents:	361
Parent Question Respondents:	740
Response Rate:	37%

	Count	Percent of Question Respondents
Does the company plan to expand in the next three years?: Estimated timeframe for expansion		
< 1 Year	72	24.00%
1-3 Years	176	58.67%
> 3 Years	47	15.67%
Total	295	

Survey Participants:	795
Question Respondents:	300
No Response Count:	61
Parent Question 'Yes' Respondents:	361
Parent Question Respondents:	740
Response Rate:	83%

	Count	Percent of Question Respondents
What, if any, are the major constraints on your expansion? (Please check all that are applicable)		
Warehousing	18	4.64%
Roads	19	4.90%
Energy reliability	23	5.93%
Problems with DAs	31	7.99%
Energy costs	32	8.25%
Transport/freight	33	8.51%
Broadband access	53	13.66%
Local regulations e.g. zoning	66	17.01%
Identifying and accessing new markets	70	18.04%
Lack of suitable premises	75	19.33%
Other (please specify):	86	22.16%
Lack of skilled staff	94	24.23%
Finance	137	35.31%
Total	737	

Survey Participants:	795
Question Respondents:	388
No Response Count:	0
Parent Question 'Yes' Respondents:	361
Parent Question Respondents:	740
Response Rate:	100%

	Count	Percent of Question Respondents
What, if any, are the major constraints on your expansion? (Please check all that are applicable): Other (please specify)		
Effective and affordable advertising	1	0.86%
Energy Costs	1	0.86%
Energy reliability	1	0.86%
Finding more projects	1	0.86%
Identifying / Accessing New Markets	1	0.86%
Local bylaws	1	0.86%
Skilled Labour supply	1	0.86%
Government	2	1.72%
Infrastructure	2	1.72%
Lack of business facilities	2	1.72%
Location	2	1.72%
Resistance to change	2	1.72%
Transportation / Freight	2	1.72%
Community support	3	2.59%
Management approval	3	2.59%
Skilled labour supply	3	2.59%
Time	3	2.59%
Taxes	4	3.45%
Communications infrastructure	5	4.31%
Financing	5	4.31%
Problems with development approvals	5	4.31%
Expansion costs	6	5.17%
Local Regulations	6	5.17%
Road conditions	6	5.17%
Economic uncertainty	11	9.48%
Lack of Suitable Premises	11	9.48%
Demand for service / product	14	12.07%
Total	104	

Survey Participants:	795
Question Respondents:	116
No Response Count:	0
Parent Question 'Other (please specify):' Respondents:	115
Parent Question Respondents:	388
Response Rate:	100%

	Count	Percent of Question Respondents
Have you approached anybody in local/provincial/federal government or business development organizations to discuss your expansion plans?		
Yes	104	28.26%
No	264	71.74%
Total	368	

Survey Participants:	795
Question Respondents:	368
No Response Count:	427
Response Rate:	46%

	Count	Percent of Question Respondents
If *Yes*, which have you approached?		
Chamber of Commerce	10	10.64%
Community Futures	12	12.77%
BC Ministry responsible for Economic Development	15	15.96%
BC Hydro	16	17.02%
Local Economic Development Office	24	25.53%
Local Council	37	39.36%
Other (please specify):	54	57.45%
Total	168	

Survey Participants:	795
Question Respondents:	94
No Response Count:	10
Parent Question 'Yes' Respondents:	104
Parent Question Respondents:	368
Response Rate:	90%

	Count	Percent of Question Respondents
If *Yes*, which have you approached?: Other (please specify)		
ADP (Automatic Data Processing)	1	1.06%
BC Transportation	1	1.06%
Building inspector	1	1.06%
CP Rail	1	1.06%
Chamber of Mines	1	1.06%
City Planners	1	1.06%
Company management	1	1.06%
Corporate head office	1	1.06%
Federal Government	1	1.06%
Fortis	1	1.06%
Front Counter BC	1	1.06%
Industry Canada	1	1.06%
Industry programs	1	1.06%
Interior Health	1	1.06%
KAST (Kootenay Association for Science & Technology)	1	1.06%
Ktunaxa Nation	1	1.06%
Landlord	1	1.06%
Local business	1	1.06%
Mayor	1	1.06%
Municipal official	1	1.06%
Nav Canada	1	1.06%
Province of British Columbia	1	1.06%
SRED (Scientific Research and Experimental Development Tax Incentive Program)	1	1.06%
School District	1	1.06%
Selkirk College	1	1.06%
BC Ministry	2	2.13%
CFDC (Community Futures British Columbia)	2	2.13%
IRAP (Industrial Research Assistance Program)	2	2.13%
KRIC (Kootenay Rockies Innovation Council)	2	2.13%

	Count	Percent of Question Respondents
If *Yes*, which have you approached?: Other (please specify)		
RDCK (Regional District of Central Kootenay)	2	2.13%
RDKB (Regional District of Kootenay Boundary)	2	2.13%
Teck	2	2.13%
BBA (Basin Business Advisors)	3	3.19%
BDC (Business Development Bank of Canada)	3	3.19%
Liquor Control and Licensing Branch - Ministry of Justice	3	3.19%
Banks / Credit unions	5	5.32%
CBT (Columbia Basin Trust)	5	5.32%
Total	58	

Survey Participants:	795
Question Respondents:	53
No Response Count:	1
Parent Question 'Other' Respondents:	54
Parent Question Respondents:	94
Response Rate:	98%

	Count	Percent of Question Respondents
Are there any local expansion plans in the next 12 - 18 months?		
Yes	231	34.79%
No	433	65.21%
Total	664	

Survey Participants:	795
Question Respondents:	664
No Response Count:	131
Response Rate:	84%

Facility Upgrades

	Count	Percent of Question Respondents
Have there been any recent facility upgrades?		
Yes	100	64.94%
No	54	35.06%
Total	154	

Survey Participants:	795
Question Respondents:	154
No Response Count:	641
Response Rate:	19%

	Count	Percent of Question Respondents
Have there been any recent facility upgrades? If *Yes*, when?: Month scale		
3	24	25.26%
6	14	14.74%
12	20	21.05%
18	8	8.42%
24	15	15.79%
36	14	14.74%
Total	95	

Survey Participants:	795
Question Respondents:	95
No Response Count:	5
Parent Question 'Yes' Respondents:	100
Parent Question Respondents:	154
Response Rate:	95%

	Count	Percent of Question Respondents
Planning any upgrades to the facility?		
Yes	77	51.33%
No	73	48.67%
Total	150	

Survey Participants: 795

Question Respondents: 150

No Response Count: 645

Response Rate: 19%

	Count	Percent of Question Respondents
Planning any upgrades to the facility? If *Yes*, when?: Month scale		
3	25	35.21%
6	19	26.76%
12	15	21.13%
18	2	2.82%
24	8	11.27%
36	2	2.82%
Total	71	

Survey Participants: 795

Question Respondents: 71

No Response Count: 6

Parent Question 'Yes' Respondents: 77

Parent Question Respondents: 150

Response Rate: 92%

	Count	Percent of Question Respondents
If *No*, are there any barriers to upgrading you wish to identify?		
No	1	7.69%
All of the buildings are leased and JG responsible for improvements. Plan is to build a new facility and so investment in the current facilities would be a waste of capital.	1	7.69%
Big Eddy Is neglected Water supply and permits	1	7.69%
Building code restrictions high cost associated with code Amperage Limitations	1	7.69%
City approval process Frustration with city and zoning bylaws, restrictions and regulations wishing to upgrade but not wanting to go through the process	1	7.69%
Existing tenant in space that company is looking to expand into.	1	7.69%
Finances. Could use some grant/money to make the building more stable Preserve a heritage building	1	7.69%
Hostility from the city tax too many rules about appearance of building	1	7.69%
Looking to increase capacity before upgrading	1	7.69%
Parking lot is owned by BC Transportation Pending change in ownership	1	7.69%
financial funding is pending.	1	7.69%
financial permits	1	7.69%
financing getting a new building for the food bank	1	7.69%
Total	13	

Survey Participants:	795
Question Respondents:	13
No Response Count:	60
Parent Question 'No' Respondents:	73
Parent Question Respondents:	150
Response Rate:	18%

Energy Efficiency

	Count	Percent of Question Respondents
Are you aware of BC Hydro Power Smart resources that are available to you?		
Yes	459	67.11%
No	225	32.89%
Total	684	

Survey Participants:	795
Question Respondents:	684
No Response Count:	111
Response Rate:	86%

	Count	Percent of Question Respondents
Have you factored improvements in energy efficiency in your expansion plans?		
Yes	77	47.83%
No	84	52.17%
Total	161	

Survey Participants:	609
Question Respondents:	161
No Response Count:	448
Response Rate:	26%

Government Services

Ratings

Government Services	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Access to Port Facilities	122	75.78%	20	12.42%	9	5.59%	9	5.59%	1	0.62%	161
Access to US Border	57	31.49%	10	5.52%	25	13.81%	71	39.23%	18	9.94%	181
Access to airport facilities	120	17.91%	173	25.82%	126	18.81%	165	24.63%	86	12.84%	670
Access to highway/ roads	13	1.83%	48	6.74%	99	13.90%	349	49.02%	203	28.51%	712
Access to markets	27	4.05%	56	8.41%	165	24.77%	302	45.35%	116	17.42%	666
Access to suppliers	28	4.13%	85	12.54%	215	31.71%	275	40.56%	75	11.06%	678
Availability of appropriately zoned land	181	33.15%	103	18.86%	83	15.20%	153	28.02%	26	4.76%	546
Availability of buildings for lease or purchase	142	24.74%	133	23.17%	102	17.77%	160	27.87%	37	6.45%	574
Availability of rail transport	325	68.28%	86	18.07%	17	3.57%	29	6.09%	19	3.99%	476
Availability of road transport services	46	7.08%	103	15.85%	157	24.15%	274	42.15%	70	10.77%	650
Availability of warehousing	252	49.61%	91	17.91%	65	12.80%	83	16.34%	17	3.35%	508
Development approval process	167	31.39%	117	21.99%	80	15.04%	139	26.13%	29	5.45%	532
Disposal of waste material	66	10.73%	73	11.87%	112	18.21%	290	47.15%	74	12.03%	615
Inspections	92	15.18%	51	8.42	94	15.51	312	51.49	57	9.41%	606

Government Services	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
/licensing				%		%		%			
Recycling	29	4.39%	70	10.61 %	122	18.48 %	324	49.09 %	115	17.42 %	660
Telecommunications (internet, cell)	7	1.04%	148	22.02 %	170	25.30 %	278	41.37 %	69	10.27 %	672
Water and sewerage supply	71	11.64%	48	7.87 %	66	10.82 %	332	54.43 %	93	15.25 %	610

Survey Participants: 795

	Count	Percent of Question Respondents
Please rate the following: Access to airport facilities		
Excellent	86	12.84%
Good	165	24.63%
Fair	126	18.81%
Poor	173	25.82%
Not applicable	120	17.91%
Total	670	

Survey Participants: 795

Question Respondents: 670

No Response Count: 125

Response Rate: 84%

	Count	Percent of Question Respondents
Please rate the following: Access to highway/roadway		
Excellent	203	28.51%
Good	349	49.02%
Fair	99	13.90%
Poor	48	6.74%
Not applicable	13	1.83%
Total	712	

Survey Participants:	795
Question Respondents:	712
No Response Count:	83
Response Rate:	90%

	Count	Percent of Question Respondents
Please rate the following: Access to markets		
Excellent	116	17.42%
Good	302	45.35%
Fair	165	24.77%
Poor	56	8.41%
Not applicable	27	4.05%
Total	666	

Survey Participants:	795
Question Respondents:	666
No Response Count:	129
Response Rate:	84%

	Count	Percent of Question Respondents
Please rate the following: Access to suppliers		
Excellent	75	11.06%
Good	275	40.56%
Fair	215	31.71%
Poor	85	12.54%
Not applicable	28	4.13%
Total	678	

Survey Participants:	795
Question Respondents:	678
No Response Count:	117
Response Rate:	85%

	Count	Percent of Question Respondents
Please rate the following: Availability of Couriers and other road transportation services		
Excellent	70	10.77%
Good	274	42.15%
Fair	157	24.15%
Poor	103	15.85%
Not applicable	46	7.08%
Total	650	

Survey Participants:	795
Question Respondents:	650
No Response Count:	145
Response Rate:	82%

	Count	Percent of Question Respondents
Please rate the following: Availability of rail transport		
Excellent	19	3.99%
Good	29	6.09%
Fair	17	3.57%
Poor	86	18.07%
Not applicable	325	68.28%
Total	476	

Survey Participants:	795
Question Respondents:	476
No Response Count:	319
Response Rate:	60%

	Count	Percent of Question Respondents
Please rate the following: Availability of warehousing		
Excellent	17	3.35%
Good	83	16.34%
Fair	65	12.80%
Poor	91	17.91%
Not applicable	252	49.61%
Total	508	

Survey Participants:	795
Question Respondents:	508
No Response Count:	287
Response Rate:	64%

	Count	Percent of Question Respondents
Please rate the following: Disposal of waste material		
Excellent	74	12.03%
Good	290	47.15%
Fair	112	18.21%
Poor	73	11.87%
Not applicable	66	10.73%
Total	615	

Survey Participants:	795
Question Respondents:	615
No Response Count:	180
Response Rate:	77%

	Count	Percent of Question Respondents
Please rate the following: Recycling		
Excellent	115	17.42%
Good	324	49.09%
Fair	122	18.48%
Poor	70	10.61%
Not applicable	29	4.39%
Total	660	

Survey Participants:	795
Question Respondents:	660
No Response Count:	135
Response Rate:	83%

	Count	Percent of Question Respondents
Please rate the following: Inspections (eg licensing)		
Excellent	57	9.41%
Good	312	51.49%
Fair	94	15.51%
Poor	51	8.42%
Not applicable	92	15.18%
Total	606	

Survey Participants:	795
Question Respondents:	606
No Response Count:	189
Response Rate:	76%

	Count	Percent of Question Respondents
Please rate the following: Development approval process		
Excellent	29	5.45%
Good	139	26.13%
Fair	80	15.04%
Poor	117	21.99%
Not applicable	167	31.39%
Total	532	

Survey Participants:	795
Question Respondents:	532
No Response Count:	263
Response Rate:	67%

	Count	Percent of Question Respondents
Please rate the following: Telecommunications (tel, Internet, Cell)		
Excellent	69	10.27%
Good	278	41.37%
Fair	170	25.30%
Poor	148	22.02%
Not applicable	7	1.04%
Total	672	

Survey Participants:	795
Question Respondents:	672
No Response Count:	123
Response Rate:	85%

	Count	Percent of Question Respondents
Please rate the following: Availability of buildings for lease or purchase		
Excellent	37	6.45%
Good	160	27.87%
Fair	102	17.77%
Poor	133	23.17%
Not applicable	142	24.74%
Total	574	

Survey Participants:	795
Question Respondents:	574
No Response Count:	221
Response Rate:	72%

	Count	Percent of Question Respondents
Please rate the following: Availability of appropriately zoned land		
Excellent	26	4.76%
Good	153	28.02%
Fair	83	15.20%
Poor	103	18.86%
Not applicable	181	33.15%
Total	546	

Survey Participants:	795
Question Respondents:	546
No Response Count:	249
Response Rate:	69%

	Count	Percent of Question Respondents
Please rate the following: Water and sewerage supply		
Excellent	93	15.25%
Good	332	54.43%
Fair	66	10.82%
Poor	48	7.87%
Not applicable	71	11.64%
Total	610	

Survey Participants:	795
Question Respondents:	610
No Response Count:	185
Response Rate:	77%

	Count	Percent of Question Respondents
Please rate the following: Access to US Border		
Excellent	18	9.94%
Good	71	39.23%
Fair	25	13.81%
Poor	10	5.52%
Not applicable	57	31.49%
Total	181	

Survey Participants:	795
Question Respondents:	181
No Response Count:	614
Response Rate:	23%

	Count	Percent of Question Respondents
Please rate the following: Access to Port Facilities		
Excellent	1	0.62%
Good	9	5.59%
Fair	9	5.59%
Poor	20	12.42%
Not applicable	122	75.78%
Total	161	

Survey Participants:	795
Question Respondents:	161
No Response Count:	634
Response Rate:	20%

		Count	Percent of Question Respondents
Please rate the following: Other (please specify)	Please rate the following: Other (please specify)		
Access to public washrooms	Poor	2	1.22%
Availability of Parking	Poor	3	1.83%
B.C Hydro	Poor	1	0.61%
BCSA	Poor	1	0.61%
Canada Post	Poor	1	0.61%
Canada Revenue Services for Small Businesses	Poor	1	0.61%
Canadian Revenue Agency	Poor	1	0.61%
Cell Service	Poor	3	1.83%
Child care	Poor	1	0.61%
Condition of Highway	Poor	1	0.61%
Emergency Services	Fair	1	0.61%
	Good	1	0.61%
	Poor	5	3.05%
Federal- Employment and Migration	Poor	1	0.61%
Ferry Service	Excellent	1	0.61%
	Fair	1	0.61%
	Not applicable	2	1.22%
	Poor	30	18.29%
FortisBC pricing	Good	1	0.61%
Front Counter BC	Poor	1	0.61%
Healthcare	Poor	1	0.61%
Higway Maintenance	Poor	2	1.22%
Hospital services	Good	1	0.61%
	Poor	2	1.22%
International workers program	Poor	1	0.61%
Maintenance of landscaping	Poor	1	0.61%
Marketing	Poor	1	0.61%
Natural gas	Good	1	0.61%

		Count	Percent of Question Respondents
Please rate the following: Other (please specify)	**Please rate the following: Other (please specify)**		
Permits (national)	**Poor**	1	0.61%
Police services	**Fair**	1	0.61%
	Good	1	0.61%
Port services/ customs and clearances	**Poor**	1	0.61%
Power outages	**Good**	1	0.61%
	Not applicable	1	0.61%
	Poor	7	4.27%
Promoting the community (growth)	**Poor**	1	0.61%
Proper Signage	**Poor**	2	1.22%
Provide information regarding geothermal regulations	**Poor**	1	0.61%
ROE Online	**Excellent**	1	0.61%
Regional Government Services	**Good**	1	0.61%
Resort Develpment Branch-Provincial Government	**Good**	1	0.61%
SR & ED Tax Incentive Program	**Poor**	1	0.61%
Service Canada	**Poor**	5	3.05%
Sewage not available	**Not applicable**	1	0.61%
	Poor	1	0.61%
Small business training and education	**Excellent**	1	0.61%
Snow Removal	**Excellent**	5	3.05%
	Fair	12	7.32%
	Good	16	9.76%
	Not applicable	7	4.27%
	Poor	7	4.27%
Telus	**Poor**	1	0.61%
Tourism BC	**Poor**	1	0.61%
Transit (local)	**Poor**	1	0.61%

		Count	Percent of Question Respondents
Please rate the following: Other (please specify)	**Please rate the following: Other (please specify)**		
WCB	**Poor**	1	0.61%
Water	**Good**	1	0.61%
Work BC	**Good**	1	0.61%
Total		151	92.07%

Survey Participants: 795

Question Respondents: 164

No Response Count: 631

Response Rate: 21%

IMPROVEMENTS

	Count	Percent of Question Respondents
Do you have any suggestions on how to improve any of the services and infrastructure listed above?		
Yes	472	67.14%
No	231	32.86%
Total	703	

Survey Participants: 795

Question Respondents: 703

No Response Count: 92

Response Rate: 88%

	Count	Percent of Question Respondents
Do you have any suggestions on how to improve any of the services and infrastructure listed above?: If *Yes*, how?		
Streamline granting of permits	7	1.50%
Provide emergency services	9	1.93%
Address land zoning issues	11	2.36%
Increase attention to community and business needs	11	2.36%
Improve sewage and waste water management	12	2.57%
Increase public transportation	12	2.57%
More support for tourism	12	2.57%
Consider more and proper signage	16	3.43%
Restructure taxes	18	3.85%
Provide a cost effective shipping and receiving service	19	4.07%
Streamline development approval processes	21	4.50%
Provide reliable electric power	24	5.14%
Improve ferry service	36	7.71%
Improve recycling and waste management	50	10.71%
Improve highway and road quality and service	56	11.99%
Increase airport services	58	12.42%
Expand electronic communication services (Cell phone/ Internet/ Broadband/Fiber)	137	29.34%
Total	509	

Survey Participants:	795
Question Respondents:	467
No Response Count:	5
Parent Question 'Yes' Respondents:	472
Parent Question Respondents:	703
Response Rate:	99%

AIRPORT

	Count	Percent of Question Respondents
Which airport services do you use?		
Bellingham	1	0.68%
Castlgar	1	0.68%
Seattle	2	1.37%
Kamloops	3	2.05%
Vancouver	6	4.11%
Kalispell	11	7.53%
Trail	11	7.53%
Spokane	25	17.12%
Cranbrook	26	17.81%
Castlegar	35	23.97%
Calgary	38	26.03%
Kelowna	53	36.30%
None	23	15.75%
Total	235	

Survey Participants:	795
Question Respondents:	146
No Response Count:	649
Response Rate:	18%

	Count	Percent of Question Respondents
Which airport services do you use?: What services would you like to see at the local airport? (where appropriate)		
Better radar	1	1.01%
Develop as a park	1	1.01%
Improved security	1	1.01%
Improvemnts to navigational aids	1	1.01%
Modest improvements	1	1.01%
More airlines	1	1.01%
Needs aircraft	1	1.01%
Rental cars	1	1.01%
Tourist information center	1	1.01%
Charter service	2	2.02%
Commercial flights	2	2.02%
Lower fares	2	2.02%
More destinations	2	2.02%
Tourism services	2	2.02%
Courier service	3	3.03%
Extended runway	3	3.03%
International flights	3	3.03%
More flights	3	3.03%
Passenger service	3	3.03%
Development of a local airport	4	4.04%
Larger aircraft	4	4.04%
Shuttle service	9	9.09%
Better flight reliability	10	10.10%
Commuter flights	13	13.13%
Total	74	

Survey Participants:	795
Question Respondents:	99
No Response Count:	696
Response Rate:	12%

Business Climate

Quality of Business Climate

Business climate ratings	No Opinion	% No Opinion	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
BIA	67	72.04%	5	5.38%	4	4.30%	9	9.68%	8	8.60%	93
Chamber of Commerce	29	16.76%	17	9.83%	40	23.12%	64	36.99%	23	13.29%	173
Colleges/Universities	140	19.86%	115	16.31%	151	21.42%	265	37.59%	34	4.82%	705
Community Futures	54	31.58%	15	8.77%	20	11.70%	58	33.92%	24	14.04%	171
Cultural/Recreational Amenities	21	2.92%	59	8.19%	153	21.25%	303	42.08%	184	25.56%	720
Economic Development	74	10.32%	208	29.01%	223	31.10%	192	26.78%	20	2.79%	717
Housing	38	5.29%	163	22.67%	260	36.16%	233	32.41%	25	3.48%	719
K-12 education	97	13.60%	75	10.52%	125	17.53%	335	46.98%	81	11.36%	713
Local Government	67	9.38%	124	17.37%	225	31.51%	244	34.17%	54	7.56%	714
Local Tax Structure	103	14.57%	160	22.63%	249	35.22%	167	23.62%	28	3.96%	707
Technical Training	139	20.26%	230	33.53%	169	24.64%	127	18.51%	21	3.06%	686
Tourism services	18	9.89%	17	9.34%	41	22.53%	82	45.05%	24	13.19%	182
Workforce Availability	36	5.02%	192	26.78%	253	35.29%	192	26.78%	44	6.14%	717
Workforce Quality	36	5.01%	89	12.38%	217	30.18%	292	40.61%	85	11.82%	719
Workforce Stability	45	6.28%	167	23.29%	226	31.52%	229	31.94%	50	6.97%	717

Survey Participants: 795

	Count	Percent of Question Respondents
Please rate the following: Workforce quality		
Excellent	85	11.82%
Good	292	40.61%
Fair	217	30.18%
Poor	89	12.38%
No opinion	36	5.01%
Total	719	

Survey Participants:	795
Question Respondents:	719
No Response Count:	76
Response Rate:	90%

	Count	Percent of Question Respondents
Please rate the following: Workforce availability		
Excellent	44	6.14%
Good	192	26.78%
Fair	253	35.29%
Poor	192	26.78%
No opinion	36	5.02%
Total	717	

Survey Participants:	795
Question Respondents:	717
No Response Count:	78
Response Rate:	90%

	Count	Percent of Question Respondents
Please rate the following: Workforce stability		
Excellent	50	6.97%
Good	229	31.94%
Fair	226	31.52%
Poor	167	23.29%
No opinion	45	6.28%
Total	717	

Survey Participants:	795
Question Respondents:	717
No Response Count:	78
Response Rate:	90%

	Count	Percent of Question Respondents
Please rate the following: Local government		
Excellent	54	7.56%
Good	244	34.17%
Fair	225	31.51%
Poor	124	17.37%
No opinion	67	9.38%
Total	714	

Survey Participants:	795
Question Respondents:	714
No Response Count:	81
Response Rate:	90%

	Count	Percent of Question Respondents
Please rate the following: Local tax structure		
Excellent	28	3.96%
Good	167	23.62%
Fair	249	35.22%
Poor	160	22.63%
No opinion	103	14.57%
Total	707	

Survey Participants:	795
Question Respondents:	707
No Response Count:	88
Response Rate:	89%

	Count	Percent of Question Respondents
Please rate the following: Economic development		
Excellent	20	2.79%
Good	192	26.78%
Fair	223	31.10%
Poor	208	29.01%
No opinion	74	10.32%
Total	717	

Survey Participants:	795
Question Respondents:	717
No Response Count:	78
Response Rate:	90%

	Count	Percent of Question Respondents
Please rate the following: Cultural/Recreational amenities		
Excellent	184	25.56%
Good	303	42.08%
Fair	153	21.25%
Poor	59	8.19%
No opinion	21	2.92%
Total	720	

Survey Participants:	795
Question Respondents:	720
No Response Count:	75
Response Rate:	91%

	Count	Percent of Question Respondents
Please rate the following: Housing		
Excellent	25	3.48%
Good	233	32.41%
Fair	260	36.16%
Poor	163	22.67%
No opinion	38	5.29%
Total	719	

Survey Participants:	795
Question Respondents:	719
No Response Count:	76
Response Rate:	90%

	Count	Percent of Question Respondents
Please rate the following: Chamber of Commerce		
Excellent	23	13.29%
Good	64	36.99%
Fair	40	23.12%
Poor	17	9.83%
No opinion	29	16.76%
Total	173	

Survey Participants:	795
Question Respondents:	173
No Response Count:	622
Response Rate:	22%

	Count	Percent of Question Respondents
Please rate the following: Tourism services		
Excellent	24	13.19%
Good	82	45.05%
Fair	41	22.53%
Poor	17	9.34%
No opinion	18	9.89%
Total	182	

Survey Participants:	795
Question Respondents:	182
No Response Count:	613
Response Rate:	23%

	Count	Percent of Question Respondents
Please rate the following: BIA (where appropriate)		
Excellent	8	8.60%
Good	9	9.68%
Fair	4	4.30%
Poor	5	5.38%
No opinion	67	72.04%
Total	93	

Survey Participants:	795
Question Respondents:	93
No Response Count:	702
Response Rate:	12%

	Count	Percent of Question Respondents
Please rate the following: Community Futures (where appropriate)		
Excellent	24	14.04%
Good	58	33.92%
Fair	20	11.70%
Poor	15	8.77%
No opinion	54	31.58%
Total	171	

Survey Participants:	795
Question Respondents:	171
No Response Count:	624
Response Rate:	22%

	Count	Percent of Question Respondents
Please rate the following: K - 12 education		
Excellent	81	11.36%
Good	335	46.98%
Fair	125	17.53%
Poor	75	10.52%
No opinion	97	13.60%
Total	713	

Survey Participants:	795
Question Respondents:	713
No Response Count:	82
Response Rate:	90%

	Count	Percent of Question Respondents
Please rate the following: Colleges/Universities		
Excellent	34	4.82%
Good	265	37.59%
Fair	151	21.42%
Poor	115	16.31%
No opinion	140	19.86%
Total	705	

Survey Participants:	795
Question Respondents:	705
No Response Count:	90
Response Rate:	89%

	Count	Percent of Question Respondents
Please rate the following: Technical training		
Excellent	21	3.06%
Good	127	18.51%
Fair	169	24.64%
Poor	230	33.53%
No opinion	139	20.26%
Total	686	

Survey Participants:	795
Question Respondents:	686
No Response Count:	109
Response Rate:	86%

	Count	Percent of Question Respondents
Please rate the local business climate		
Excellent	30	3.99%
Good	283	37.63%
Fair	323	42.95%
Poor	116	15.43%
Total	752	

Survey Participants:	795
Question Respondents:	752
No Response Count:	43
Response Rate:	95%

	Count	Percent of Question Respondents
Please compare the local business climate today versus 5 years ago		
Better today	221	30.36%
No change	164	22.53%
Worse today	278	38.19%
No opinion	65	8.93%
Total	728	

Survey Participants:	795
Question Respondents:	728
No Response Count:	67
Response Rate:	92%

	Count	Percent of Question Respondents
Please compare the local business climate today versus 5 years ago: If *worse today*, why?		
More competition	6	2.39%
Less tourists	8	3.19%
Locals shopping elsewhere	11	4.38%
Mine closure	11	4.38%
Strong Canadian dollar	11	4.38%
Disposable income is down	14	5.58%
Declining employment	15	5.98%
Population (low/aging/declining)	20	7.97%
Businesses closing	24	9.56%
Forestry downturn	28	11.16%
Recession	28	11.16%
Declining economy	74	29.48%
Total	250	

Survey Participants:	795
Question Respondents:	251
No Response Count:	27
Parent Question 'Worse today' Respondents:	278
Parent Question Respondents:	728
Response Rate:	90%

	Count	Percent of Question Respondents
Do you have any forecast for the condition of the local business climate 5 years from today?		
Will be better	502	67.47%
No change	147	19.76%
Will be worse	48	6.45%
No opinion	47	6.32%
Total	744	

Survey Participants:	795
Question Respondents:	744
No Response Count:	51
Response Rate:	94%

Strengths and Weaknesses

	Count	Percent of Question Respondents
What are the community's strengths as a place to do business?		
Low crime rate	3	0.43%
Outdoor activities	3	0.43%
Low competition	6	0.85%
Quality of life	11	1.56%
Word of mouth	15	2.13%
Above average household incomes	20	2.84%
Social network	20	2.84%
Affordable	24	3.41%
Environment	25	3.56%
Outdoor Activities	25	3.56%
Skilled workforce	25	3.56%
Customer loyalty	35	4.98%
Tourism	35	4.98%
Recreational opportunities	36	5.12%
Stable economy	39	5.55%
Great place to live	48	6.83%
Strong sense of community	79	11.24%
Lifestyle	98	13.94%
Location	120	17.07%
Total	667	

Survey Participants:	795
Question Respondents:	703
No Response Count:	92
Response Rate:	88%

	Count	Percent of Question Respondents
What are the community's weaknesses as a place to do business?		
Dependent on one major industry	2	0.28%
Reliance on tourism	3	0.43%
Lack of support for local businesses	4	0.57%
Poor road conditions	7	0.99%
Available space	15	2.13%
Cross border shopping (US/Alberta)	23	3.27%
Seasonality	23	3.27%
High cost of living	25	3.55%
Tax structure	26	3.69%
Development Constraints (Zoning/Bureaucracy/Permits)	27	3.84%
Location	45	6.39%
Shipping and Receiving costs	54	7.67%
Population (size/growth/aging)	82	11.65%
Total	336	

Survey Participants:	795
Question Respondents:	704
No Response Count:	91
Response Rate:	89%

Business Growth

	Count	Percent of Question Respondents
Are there any barriers to growth in this community?		
Yes	637	85.16%
No	111	14.84%
Total	748	

Survey Participants:	795
Question Respondents:	748
No Response Count:	47
Response Rate:	94%

	Count	Percent of Question Respondents
Are there any barriers to growth in this community? : If *Yes*, what are they?		
Negative attitude	8	1.28%
Location	11	1.76%
Infrastructure supporting local economy	20	3.20%
Affordable housing	26	4.16%
Tax structure	26	4.16%
Cost of doing business	28	4.48%
Skilled labor	31	4.96%
Low economic diversification	34	5.44%
Developmental approval process	46	7.36%
Low population	86	13.76%
Total	316	

Survey Participants:	795
Question Respondents:	625
No Response Count:	12
Parent Question 'Yes' Respondents:	637
Parent Question Respondents:	748
Response Rate:	98%

Business Growth

	Count	Percent of Question Respondents
Are there suppliers you think could locate in this region?		
Yes	228	34.39%
No	435	65.61%
Total	663	

Survey Participants:	795
Question Respondents:	663
No Response Count:	132
Response Rate:	83%

	Count	Percent of Question Respondents
Are there suppliers you think could locate in this region?: If *Yes*, please list		
- Tech fibre network building material\n\n- Tried to get electrical wholesalers into the region (faced no interest or fear of products)	1	0.47%
Computing hardware suppliers	1	0.47%
Forestry Suppliers	1	0.47%
Personal wellness services	1	0.47%
Building supplies	2	0.94%
Courier service	2	0.94%
Distributors	2	0.94%
Mining services	2	0.94%
Solar energy	2	0.94%
Electrical supplier	3	1.42%
Green industries	3	1.42%
Printing suppliers	3	1.42%
Retail stores	4	1.89%
Mining suppliers	5	2.36%
Agricultural suppliers	7	3.30%
Manufacturers	13	6.13%

	Count	Percent of Question Respondents
Are there suppliers you think could locate in this region?: If *Yes*, please list		
Meats & Dairy / Fruits and Vegetables / Grains	21	9.91%
Total	73	

Survey Participants:	795
Question Respondents:	212
No Response Count:	16
Parent Question 'Yes' Respondents:	228
Parent Question Respondents:	663
Response Rate:	93%

	Count	Percent of Question Respondents
What sectors, business or industry do you think the community should try to attract?		
Yes	555	80.32%
No	136	19.68%
Total	691	

Survey Participants:	795
Question Respondents:	691
No Response Count:	104
Response Rate:	87%

	Count	Percent of Question Respondents
What sectors, business or industry do you think the community should try to attract?: If *Yes*, please list		
Grocery stores	4	0.75%
Shipping companies	5	0.93%
Construction	6	1.12%
Internet services	8	1.50%
Retail stores	8	1.50%

	Count	Percent of Question Respondents
What sectors, business or industry do you think the community should try to attract?: If *Yes*, please list		
Food businesses	9	1.68%
Mining and exploration	9	1.68%
Agriculture	12	2.24%
Forestry	12	2.24%
Creative businesses	17	3.18%
Hospitality	17	3.18%
Green Businesses	18	3.36%
Health and Wellness	18	3.36%
Arts & Culture	26	4.86%
Manufacturing	38	7.10%
Technology businesses	41	7.66%
Tourism	190	35.51%
Total	438	

Survey Participants:	795
Question Respondents:	535
No Response Count:	20
Parent Question 'Yes' Respondents:	555
Parent Question Respondents:	691
Response Rate:	96%

Support Providers

Level of service from business support providers	Not Applicable	% Not Applicable	Unable to assist	% Unable to assist	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Basin Business Advisors	90	69.77%	15	11.63%	2	1.55%	2	1.55%	14	10.85%	6	4.65%	129
Chamber of Commerce	22	12.57%	8	4.57%	19	10.86%	37	21.14%	64	36.57%	25	14.29%	175
College Industry Liaison Officer	78	60.94%	7	5.47%	2	1.56%	3	2.34%	25	19.53%	13	10.16%	128
Community Futures	64	45.39%	15	10.64%	6	4.26%	4	2.84%	29	20.57%	23	16.31%	141
Continuing Education and Workforce Training	54	39.42%	10	7.30%	3	2.19%	16	11.68%	43	31.39%	11	8.03%	137
Economic Development Organization / Commission	60	46.51%	11	8.53%	13	10.08%	11	8.53%	22	17.05%	12	9.30%	129
Innovation Councils (Kootenay Associati	92	73.60%	13	10.40%	2	1.60%	4	3.20%	10	8.00%	4	3.20%	125

Level of service from business support providers	Not Applicable	% Not Applicable	Unable to assist	% Unable to assist	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
on for Science and Technology, Kootenay Rockies Innovation Council)													
Invest Kootenay	104	81.89%	15	11.81%	2	1.57%	2	1.57%	3	2.36%	1	0.79%	127
Kootenay Aboriginal Business Advocates Society	106	83.46%	14	11.02%	3	2.36%	1	0.79%	3	2.36%	0	0.00%	127
National Research Council Industrial Research Assistance	102	87.93%	7	6.03%	1	0.86%	0	0.00%	3	2.59%	3	2.59%	116
Scientific Research and Experimental Development Tax Incentive Program	102	88.70%	8	6.96%	1	0.87%	0	0.00%	2	1.74%	2	1.74%	115

Survey Participants: 609

	Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Chamber of Commerce		
Excellent	25	14.29%
Good	64	36.57%
Fair	37	21.14%
Poor	19	10.86%
Unable to assist	8	4.57%
Not applicable	22	12.57%
Total	175	

Survey Participants:	609
Question Respondents:	175
No Response Count:	434
Response Rate:	29%

	Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Community Futures		
Excellent	23	16.31%
Good	29	20.57%
Fair	4	2.84%
Poor	6	4.26%
Unable to assist	15	10.64%
Not applicable	64	45.39%
Total	141	

Survey Participants:	609
Question Respondents:	141
No Response Count:	468
Response Rate:	23%

	Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Economic Development Organization / Commission		
Excellent	12	9.30%
Good	22	17.05%
Fair	11	8.53%
Poor	13	10.08%
Unable to assist	11	8.53%
Not applicable	60	46.51%
Total	129	

Survey Participants:	609
Question Respondents:	129
No Response Count:	480
Response Rate:	21%

	Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Innovation Councils (Kootenay Association for Science and Technology, Kootenay Rockies Innovation Council)		
Excellent	4	3.20%
Good	10	8.00%
Fair	4	3.20%
Poor	2	1.60%
Unable to assist	13	10.40%
Not applicable	92	73.60%
Total	125	

Survey Participants:	609
Question Respondents:	125
No Response Count:	484
Response Rate:	21%

	Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Basin Business Advisors (BBA)		
Excellent	6	4.65%
Good	14	10.85%
Fair	2	1.55%
Poor	2	1.55%
Unable to assist	15	11.63%
Not applicable	90	69.77%
Total	129	

Survey Participants:	609
Question Respondents:	129
No Response Count:	480
Response Rate:	21%

	Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: College Continuing Education and Workforce Training		
Excellent	11	8.03%
Good	43	31.39%
Fair	16	11.68%
Poor	3	2.19%
Unable to assist	10	7.30%
Not applicable	54	39.42%
Total	137	

Survey Participants:	609
Question Respondents:	137
No Response Count:	472
Response Rate:	22%

	Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Kootenay Aboriginal Business Advocates Society		
Good	3	2.36%
Fair	1	0.79%
Poor	3	2.36%
Unable to assist	14	11.02%
Not applicable	106	83.46%
Total	127	

Survey Participants:	609
Question Respondents:	127
No Response Count:	482
Response Rate:	21%

	Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.:Invest Kootenay		
Excellent	1	0.79%
Good	3	2.36%
Fair	2	1.57%
Poor	2	1.57%
Unable to assist	15	11.81%
Not applicable	104	81.89%
Total	127	

Survey Participants:	609
Question Respondents:	127
No Response Count:	482
Response Rate:	21%

	Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: National Research Council Industrial Research Assistance Program		
Excellent	3	2.59%
Good	3	2.59%
Poor	1	0.86%
Unable to assist	7	6.03%
Not applicable	102	87.93%
Total	116	

Survey Participants:	609
Question Respondents:	116
No Response Count:	493
Response Rate:	19%

	Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Scientific Research and Experimental Development Tax Incentive Program		
Excellent	2	1.74%
Good	2	1.74%
Poor	1	0.87%
Unable to assist	8	6.96%
Not applicable	102	88.70%
Total	115	

Survey Participants:	609
Question Respondents:	115
No Response Count:	494

	Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Scientific Research and Experimental Development Tax Incentive Program		

Response Rate: 19%

	Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: College Industry Liaison Officer		
Excellent	13	10.16%
Good	25	19.53%
Fair	3	2.34%
Poor	2	1.56%
Unable to assist	7	5.47%
Not applicable	78	60.94%
Total	128	

Survey Participants: 609

Question Respondents: 128

No Response Count: 481

Response Rate: 21%

		Count	Percent of Question Respondents

Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.	Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Other		
Excellent	**CBT**	1	4.35%
	CBT - Student Workers	1	4.35%
	CBT / College Funded work program	1	4.35%
	CBT Employment	1	4.35%
	CBT: Columbia Kootenay Cultural Alliance - art program	1	4.35%
	Columbia Basin Trust	1	4.35%
	Columbia Valley Credit Union	1	4.35%
	Employment Center	1	4.35%
	KC	1	4.35%
	RE	1	4.35%
	The Mayor	1	4.35%
	Town of Golden	2	8.70%
Fair	**Forest Renvewal Services of B.C**	1	4.35%
Good	**Federated Co-operatives Limited-headoffice**	1	4.35%
	HA	1	4.35%
	Kootenay Rockies Tourism	1	4.35%
	PG	1	4.35%
Poor	**None have contacted the business, nor has the business contacted them**	1	4.35%
	RDCK	1	4.35%
	Skills training -Equipment operators mechanics	1	4.35%
	Town of Golden - for broadband access	1	4.35%
Unable to assist	**what is Kootenay Rockies Innovation Council?**	1	4.35%
Total		23	100.00%

Survey Participants: 609
Question Respondents: 23
No Response Count: 586

		Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.	**Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Other**		

Response Rate: 4%

		Count	Percent of Question Respondents
Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.	**Listed below are a number of business support providers. For each of these please indicate the level of service you have had in dealing with them. If you have never had contact with them please indicate this.: Other**		
Excellent	**Canadian Government employment - student**	1	20.00%
	Golden Employment Centre	1	20.00%
Good	**Golden Tourism**	1	20.00%
	Teachers Association (RMDTA)	1	20.00%
No Response	**pr**	1	20.00%
Total		5	100.00%

Survey Participants: 609

Question Respondents: 5

No Response Count: 604

Response Rate: 1%

Business Competitiveness

Business competitiveness factors	Not applicable	% Not applicable	Not important at all or not very important	% Not important at all or not very important	Somewhat important, very important	% Somewhat important, very important	Respondents
Access to exporting and international markets	234	45.79%	167	32.68%	110	21.53%	511
Accessing capital	91	17.91%	140	27.56%	277	54.53%	508
Add or change in business, products or services	48	9.43%	88	17.29%	373	73.28%	509
Affordable shipping/freight	80	15.75%	80	15.75%	348	68.50%	508
Availability of telecommunications infrastructure and services	12	2.37%	60	11.83%	435	85.80%	507
Energy costs	59	11.57%	111	21.76%	340	66.67%	510
Exchange rate for Canadian dollar	104	20.43%	124	24.36%	281	55.21%	509
Expansion of workforce employees	44	8.63%	143	28.04%	323	63.33%	510
Improvement business management	40	8.08%	72	14.55%	383	77.37%	495
Improvement of customer services	19	3.72%	40	7.83%	452	88.45%	511
Improving worker productivity	43	8.43%	84	16.47%	383	75.10%	510
New market development locally	37	7.23%	76	14.84%	399	77.93%	512

Business competitiveness factors	Not applicable	% Not applicable	Not important at all or not very important	% Not important at all or not very important	Somewhat important, very important	% Somewhat important, very important	Respondents
New market development outside of region	78	15.23%	136	26.56%	298	58.20%	512
New product research and development	62	12.16%	66	12.94%	382	74.90%	510
Reliable air transportation	149	29.33%	175	34.45%	184	36.22%	508
Strategic alliances (joining with other businesses to provide products/services)	45	8.84%	103	20.24%	361	70.92%	509
Water/sewer availability	142	28.06%	121	23.91%	243	48.02%	506
Water/sewer costs	147	28.99%	123	24.26%	237	46.75%	507
Workforce skill development	15	2.95%	49	9.65%	444	87.40%	508
Workplace health and safety	47	9.23%	87	17.09%	375	73.67%	509

Survey Participants:	609

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: New product research and development		
Very important	230	45.10%
Somewhat important	152	29.80%
Not very important	46	9.02%
Not important at all	20	3.92%
Not applicable	62	12.16%
Total	510	

Survey Participants:	609
Question Respondents:	510
No Response Count:	99
Response Rate:	84%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: New market development locally		
Very important	230	44.92%
Somewhat important	169	33.01%
Not very important	46	8.98%
Not important at all	30	5.86%
Not applicable	37	7.23%
Total	512	

Survey Participants:	609
Question Respondents:	512
No Response Count:	97
Response Rate:	84%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: New market development outside of region		
Very important	150	29.30%
Somewhat important	148	28.91%
Not very important	84	16.41%
Not important at all	52	10.16%
Not applicable	78	15.23%
Total	512	

Survey Participants:	609
Question Respondents:	512
No Response Count:	97
Response Rate:	84%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Access to exporting and international markets		
Very important	65	12.72%
Somewhat important	45	8.81%
Not very important	82	16.05%
Not important at all	85	16.63%
Not applicable	234	45.79%
Total	511	

Survey Participants:	609
Question Respondents:	511
No Response Count:	98
Response Rate:	84%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Add or change in business, products or services		
Very important	162	31.83%
Somewhat important	211	41.45%
Not very important	58	11.39%
Not important at all	30	5.89%
Not applicable	48	9.43%
Total	509	

Survey Participants:	609
Question Respondents:	509
No Response Count:	100
Response Rate:	84%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Strategic alliances (joining with other businesses to provide products/services)		
Very important	165	32.42%
Somewhat important	196	38.51%
Not very important	72	14.15%
Not important at all	31	6.09%
Not applicable	45	8.84%
Total	509	

Survey Participants:	609
Question Respondents:	509
No Response Count:	100
Response Rate:	84%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Improving worker productivity		
Very important	209	40.98%
Somewhat important	174	34.12%
Not very important	64	12.55%
Not important at all	20	3.92%
Not applicable	43	8.43%
Total	510	

Survey Participants:	609
Question Respondents:	510
No Response Count:	99
Response Rate:	84%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Expansion of workforce employees		
Very important	137	26.86%
Somewhat important	186	36.47%
Not very important	97	19.02%
Not important at all	46	9.02%
Not applicable	44	8.63%
Total	510	

Survey Participants:	609
Question Respondents:	510
No Response Count:	99
Response Rate:	84%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Workplace health and safety		
Very important	265	52.06%
Somewhat important	110	21.61%
Not very important	60	11.79%
Not important at all	27	5.30%
Not applicable	47	9.23%
Total	509	

Survey Participants:	609
Question Respondents:	509
No Response Count:	100
Response Rate:	84%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Workforce skill development		
Very important	283	55.71%
Somewhat important	161	31.69%
Not very important	36	7.09%
Not important at all	13	2.56%
Not applicable	15	2.95%
Total	508	

Survey Participants:	609
Question Respondents:	508
No Response Count:	101
Response Rate:	83%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Energy costs		
Very important	199	39.02%
Somewhat important	141	27.65%
Not very important	70	13.73%
Not important at all	41	8.04%
Not applicable	59	11.57%
Total	510	

Survey Participants:	609
Question Respondents:	510
No Response Count:	99
Response Rate:	84%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Water/sewer availability		
Very important	164	32.41%
Somewhat important	79	15.61%
Not very important	71	14.03%
Not important at all	50	9.88%
Not applicable	142	28.06%
Total	506	

Survey Participants:	609
Question Respondents:	506
No Response Count:	103
Response Rate:	83%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Water/sewer costs		
Very important	138	27.22%
Somewhat important	99	19.53%
Not very important	71	14.00%
Not important at all	52	10.26%
Not applicable	147	28.99%
Total	507	

Survey Participants:	609
Question Respondents:	507
No Response Count:	102
Response Rate:	83%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Reliable air transportation		
Very important	95	18.70%
Somewhat important	89	17.52%
Not very important	99	19.49%
Not important at all	76	14.96%
Not applicable	149	29.33%
Total	508	

Survey Participants:	609
Question Respondents:	508
No Response Count:	101
Response Rate:	83%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Affordable shipping/freight		
Very important	253	49.80%
Somewhat important	95	18.70%
Not very important	49	9.65%
Not important at all	31	6.10%
Not applicable	80	15.75%
Total	508	

Survey Participants:	609
Question Respondents:	508
No Response Count:	101
Response Rate:	83%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Improvement of customer services		
Very important	298	58.32%
Somewhat important	154	30.14%
Not very important	30	5.87%
Not important at all	10	1.96%
Not applicable	19	3.72%
Total	511	

Survey Participants:	609
Question Respondents:	511
No Response Count:	98
Response Rate:	84%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Availability of telecommunications infrastructure and services		
Very important	316	62.33%
Somewhat important	119	23.47%
Not very important	42	8.28%
Not important at all	18	3.55%
Not applicable	12	2.37%
Total	507	

Survey Participants:	609
Question Respondents:	507
No Response Count:	102
Response Rate:	83%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Exchange rate for Canadian dollar		
Very important	150	29.47%
Somewhat important	131	25.74%
Not very important	81	15.91%
Not important at all	43	8.45%
Not applicable	104	20.43%
Total	509	

Survey Participants:	609
Question Respondents:	509
No Response Count:	100
Response Rate:	84%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Accessing capital		
Very important	132	25.98%
Somewhat important	145	28.54%
Not very important	85	16.73%
Not important at all	55	10.83%
Not applicable	91	17.91%
Total	508	

Survey Participants:	609
Question Respondents:	508
No Response Count:	101
Response Rate:	83%

	Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Improvment business management		
Very important	199	40.20%
Somewhat important	184	37.17%
Not very important	51	10.30%
Not important at all	21	4.24%
Not applicable	40	8.08%
Total	495	

Survey Participants:	609
Question Respondents:	495
No Response Count:	114
Response Rate:	81%

		Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*	**Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Other**		
Somewhat important	**Access to grants**	1	1.25%
	Cost of technology	1	1.25%
	Ferry Service affects client base substantially getting goods to market	1	1.25%
	Financing Rates	1	1.25%
	Industrial Park	1	1.25%
	PH &H debit system required for gov't sales	1	1.25%
	Power Outages - happen to often and last too long	1	1.25%
	Power Outages really affect business cannot open customers affected.	1	1.25%
	Stable Ferry Service	1	1.25%
	access to local technology suppliers	1	1.25%
Very important	**# of people in community**	1	1.25%
	Ability to access the most recent films	1	1.25%
	Access to broadband	1	1.25%
	Availability of staff	1	1.25%
	Build a bridge get rid of Ferry	1	1.25%
	Continuity with local gov't	1	1.25%
	Diesel & propane costs	1	1.25%
	Economic development of the West Kootenay area.	1	1.25%
	Ferry Service - needs to be reliable during peak summer period	1	1.25%

		Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*	**Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Other**		
	Ferry Service -we depend on tourist season to make our living	1	1.25%
	Ferry Service must be consistant, delays add to cost of shipments	1	1.25%
	Ferry Service needs to be stable long delays cost money for freight and frustrate tourists	1	1.25%
	Ferry Service- community needs reliability	6	7.50%
	Ferry System - affects delivery of goods to area and the tourist who we depend on	1	1.25%
	Ferry System needs to remain reliable backups in peak periods reallly affect the transport business	1	1.25%
	Ferry System vital for delivery of food products delays are costly	1	1.25%
	Ferry service during peak seasons must be maintained	1	1.25%
	Ferry system delays affect bottom line increases freight costs when delayed.	1	1.25%
	Ferry system during peak periods must remain stable	1	1.25%
	Ferry system must be reliable during peak periods	1	1.25%
	Ferry system must be reliable in peak summer periods	1	1.25%
	Ferry system must remain reliable	1	1.25%

		Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*	**Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Other**		
	hugely important for the transportation and cost of delivering goo		
	Ferry system needs to be utilized in the best way possible.	1	1.25%
	Fibre Optic Internet	1	1.25%
	First impression staff and building	1	1.25%
	Funding / Local government support	1	1.25%
	Gap in skills and available people	1	1.25%
	Growth in local community	1	1.25%
	Growth of Community	1	1.25%
	Improvement in tourism infrastructure	1	1.25%
	Inudustrial Park needed for expansion	1	1.25%
	Municipal process (permits, development red tape)	1	1.25%
	Positive economic climate	1	1.25%
	Power Outages - too many to frequent greatly affect ability to work must shut down.	1	1.25%
	Power Outages affect business especially in summer peak months	1	1.25%
	Power Outages affect business substancially too many to often	1	1.25%
	Power Outages greatly affect business	1	1.25%

		Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*	**Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Other**		
	Power Outages of any kind especially in Peak Summer periods very bad for business .	1	1.25%
	Power Outages really affect	2	2.50%
	Power Outages to many to frequent	1	1.25%
	Power Outages- any season greatly affect bottom line to many of them	1	1.25%
	Power outages happen too often and last too long.	1	1.25%
	Raw Material costs	1	1.25%
	Reliable Shipping/freight	1	1.25%
	Retail location costs	1	1.25%
	Road Transportation / Hwy 1 Improvements	1	1.25%
	Skilled labour attraction and retention	1	1.25%
	Structural and asset improvements	1	1.25%
	Succession Planning	1	1.25%
	Technology	1	1.25%
	Town Council open-minded about business possibilities	1	1.25%
	Town of Golden being interested in business success	1	1.25%
	Up keep of local trails & resort trails for biking	1	1.25%
	availability of skilled workers	1	1.25%
	available workers and affordable	1	1.25%

		Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*	**Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Other**		
	rates		
	commercial lending is key to business success	1	1.25%
	government recognition of regional colleges to small communities	1	1.25%
	group advertisement - putting ND on map	1	1.25%
	improve workplace technology/ equipment	1	1.25%
	need more people in area	1	1.25%
	road access	1	1.25%
	skilled labour available	1	1.25%
	staff training	1	1.25%
	viability of the community	1	1.25%
Total		80	100.00%

Survey Participants:	609
Question Respondents:	80
No Response Count:	529
Response Rate:	13%

		Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*	**Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Other**		
Not very important	**Poweroutages- greatly affect productivity**	1	2.70%
Somewhat important	**Access to skilled labour**	1	2.70%
	Ferry Service must be maintained as this is how the tourists get here.	1	2.70%
	Ferry System backlogs affect wether or not someone will stop and shop	1	2.70%
	POWER OUTAGES - way to often we pay high energy costs and get nothing for it.	1	2.70%
	POWER Outages in summer months affect our bottom line for the year	1	2.70%
	Power Outages - hard to do business when power is out to many to often	1	2.70%
	Power Outages too many very costly for business	1	2.70%
	Power Outages-to many and too frequent loose money when we cannot service our clients	1	2.70%
	access to local marketing suppliers	1	2.70%
Very important	**Community supports recreation**	1	2.70%
	Development	1	2.70%
	FTE's (full time equivilents) grant managment process challenging and v important	1	2.70%
	Fe	1	2.70%

		Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*	**Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Other**		
	Ferry	1	2.70%
	Ferry Service	1	2.70%
	Ferry Service less delays	1	2.70%
	Ferry delays affect delivery of products and increase costs	1	2.70%
	Ferry system needs to be reliable for tourist season	1	2.70%
	Heavy taxes & fuel in BC	1	2.70%
	Industrial Park - need more areas in community for businesses	1	2.70%
	Industrial Park to attract new businesses	1	2.70%
	POWER OUTAGES - huge affect to many and to often	1	2.70%
	POWER OUTAGES greatly affect our business	1	2.70%
	Power Outages - during summer peak tourist season greatly affect business	1	2.70%
	Power Outages affect customers directly, store closed, loose business	1	2.70%
	Power Outages too many and too frequent have to close store	1	2.70%
	Power Outages too many very costly for business	2	5.41%
	Power Outages- way to many during summer peak periods.	1	2.70%

		Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*	**Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Other**		
	Power outages	1	2.70%
	Power outages during peak season affect bottom line	1	2.70%
	economic development of area	1	2.70%
	highway signage	1	2.70%
	highway signage for business centre	1	2.70%
	streamlining permit process	1	2.70%
	training facilitator in high school	1	2.70%
Total		37	100.00%

Survey Participants:	609
Question Respondents:	37
No Response Count:	572
Response Rate:	6%

		Count	Percent of Question Respondents
Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*	**Looking forward to the next five years, please indicate how important each of these factors will be in ensuring that this business will remain competitive. Specify *Other*: Other**		
Somewhat important	**Airport landing strip would help us a lot for delivery of goods as KalTire has a cargo plane**	1	7.69%
	Ferry system important to business needs to be reliable	1	7.69%
	Industrial Park to encourage new businesses	1	7.69%
	Large Vehicles parking in front of business blocking access	1	7.69%
	Loarge vehicles parked infront of business blocks access	1	7.69%
	Parking large vehicles parking in front of store block entrance	1	7.69%
	Parking of large vehicles in front of businesses no access to the businesses	1	7.69%
Very important	**Bike Trail - maintenance & upkeep**	1	7.69%
	Chamber of Commerce	1	7.69%
	Industrial Park	1	7.69%
	Influx of new people	1	7.69%
	Power outages	1	7.69%
	Tech school training at high school level	1	7.69%
Total		13	100.00%

Survey Participants:	609
Question Respondents:	13
No Response Count:	596
Response Rate:	2%

Productivity Drivers

Performance of key productivity drivers	Not Applicable	% Not Applicable	Poor	% Poor	Fair	% Fair	Good	% Good	Excellent	% Excellent	Respondents
Innovation & the use of technology	23	5.39%	9	2.11%	88	20.61%	181	42.39%	126	29.51%	427
Investing in people and skills	37	8.69%	11	2.58%	75	17.61%	192	45.07%	111	26.06%	426
Leadership and management capacity	14	3.27%	4	0.93%	36	8.41%	240	56.07%	134	31.31%	428
Measuring impact of productivity efforts/ investments	70	16.51%	22	5.19%	107	25.24%	163	38.44%	62	14.62%	424
Networking and collaboration with other businesses	35	8.22%	24	5.63%	99	23.24%	174	40.85%	94	22.07%	426
Organizing work (structures & processes)	33	7.80%	3	0.71%	70	16.55%	220	52.01%	97	22.93%	423
Productive workplace culture	15	3.50%	1	0.23%	31	7.24%	250	58.41%	131	30.61%	428

Survey Participants: 609

Productivity Drivers

	Count	Percent of Question Respondents
Please rate the following productivity drivers.: Leadership and management capacity		
Excellent	134	31.31%
Good	240	56.07%
Fair	36	8.41%
Poor	4	0.93%
Not applicable	14	3.27%
Total	428	

Survey Participants:	609
Question Respondents:	428
No Response Count:	181
Response Rate:	70%

	Count	Percent of Question Respondents
Please rate the following productivity drivers.: Productive workplace culture		
Excellent	131	30.61%
Good	250	58.41%
Fair	31	7.24%
Poor	1	0.23%
Not applicable	15	3.50%
Total	428	

Survey Participants:	609
Question Respondents:	428
No Response Count:	181
Response Rate:	70%

	Count	Percent of Question Respondents
Please rate the following productivity drivers.: Innovation & the use of technology		
Excellent	126	29.51%
Good	181	42.39%
Fair	88	20.61%
Poor	9	2.11%
Not applicable	23	5.39%
Total	427	

Survey Participants:	609
Question Respondents:	427
No Response Count:	182
Response Rate:	70%

	Count	Percent of Question Respondents
Please rate the following productivity drivers.: Investing in people and skills		
Excellent	111	26.06%
Good	192	45.07%
Fair	75	17.61%
Poor	11	2.58%
Not applicable	37	8.69%
Total	426	

Survey Participants:	609
Question Respondents:	426
No Response Count:	183
Response Rate:	70%

	Count	Percent of Question Respondents
Please rate the following productivity drivers.: Organizing work (structures & processes)		
Excellent	97	22.93%
Good	220	52.01%
Fair	70	16.55%
Poor	3	0.71%
Not applicable	33	7.80%
Total	423	

Survey Participants:	609
Question Respondents:	423
No Response Count:	186
Response Rate:	69%

	Count	Percent of Question Respondents
Please rate the following productivity drivers.: Networking and collaboration with other businesses		
Excellent	94	22.07%
Good	174	40.85%
Fair	99	23.24%
Poor	24	5.63%
Not applicable	35	8.22%
Total	426	

Survey Participants:	609
Question Respondents:	426
No Response Count:	183
Response Rate:	70%

	Count	Percent of Question Respondents
Please rate the following productivity drivers.: Measuring impact of productivity efforts/ investments		
Excellent	62	14.62%
Good	163	38.44%
Fair	107	25.24%
Poor	22	5.19%
Not applicable	70	16.51%
Total	424	

Survey Participants:	609
Question Respondents:	424
No Response Count:	185
Response Rate:	70%

Economic Drivers

	Count	Percent of Question Respondents
Please indicate which economic drivers have the greatest potential for growth in the region over the next 5 to 10 years. (please pick top 3)		
Finance	3	0.60%
Government	7	1.39%
Education	38	7.54%
Agriculture	45	8.93%
Other niche service businesses (e.g. services to seniors)	55	10.91%
Green or environmental businesses	74	14.68%
Arts	83	16.47%
culture and creative businesses	83	16.47%
Manufacturing	102	20.24%
Construction	114	22.62%
Health & wellness	117	23.21%
Forestry	136	26.98%
Technology-based businesses	151	29.96%
Relocation of people from urban centres	169	33.53%
Tourism	331	65.67%
Other	152	30.16%
Total	1660	

Survey Participants:	609
Question Respondents:	504
No Response Count:	105
Response Rate:	83%

	Count	Percent of Question Respondents
Please indicate which economic drivers have the greatest potential for growth in the region over the next 5 to 10 years. (please pick top 3): If *Other* please specify		
Battery manufacturing	1	0.20%
Building beautification	1	0.20%
Health and Wellness	1	0.20%
Hi-Tech	1	0.20%
Manufacturing	1	0.20%
Pulp	1	0.20%
Agriculture	2	0.40%
Fresh water	2	0.40%
Hospitality	2	0.40%
Recreation	2	0.40%
Retail	2	0.40%
Senior services	3	0.60%
Transportation	3	0.60%
Hydroelectricity	4	0.79%
Recycling	4	0.79%
Mining	70	13.89%
Total	100	

Survey Participants:	609
Question Respondents:	103
No Response Count:	49
Parent Question 'Other' Respondents:	152
Parent Question Respondents:	504
Response Rate:	68%

PROXIMITY TO ALBERTA

	Count	Percent of Question Respondents
Is your business impacted by its proximity to the Alberta border?		
Yes	75	65.79%
No	39	34.21%
Total	114	

Survey Participants:	609
Question Respondents:	114
No Response Count:	495
Response Rate:	19%

	Count	Percent of Question Respondents
Is your business impacted by its proximity to the Alberta border?: If *Yes*, please explain		
Positive - Access to large equipment	1	1.37%
Positive - Alberta has higher recycling fees	1	1.37%
Positvie - Alberta workforce	2	2.74%
Negative - Alberta competition	3	4.11%
Positive - Alberta suppliers	3	4.11%
Negative - Alberta has lower taxes	5	6.85%
Negative - Loss of sales to Alberta	13	17.81%
Positive - Alberta customers	43	58.90%
Total	71	

Survey Participants:	609
Question Respondents:	73
No Response Count:	2
Parent Question 'Yes' Respondents:	75
Parent Question Respondents:	114
Response Rate:	97%

Assessment and Plans

Overall Health

	Count	Percent of Question Respondents
Rate the following: Facility's overall health		
Excellent	154	22.48%
Good	398	58.10%
Fair	105	15.33%
Poor	22	3.21%
Not applicable	6	0.88%
Total	685	

Survey Participants:	795
Question Respondents:	685
No Response Count:	110
Response Rate:	86%

	Count	Percent of Question Respondents
Rate the following: Overall health of the parent company		
Excellent	71	11.62%
Good	72	11.78%
Fair	13	2.13%
Poor	2	0.33%
Not applicable	453	74.14%
Total	611	

Survey Participants:	795
Question Respondents:	611
No Response Count:	184
Response Rate:	77%

Attitude toward Community

	Count	Percent of Question Respondents
Rate the following: Local management's attitude toward the community		
Excellent	329	48.96%
Good	257	38.24%
Fair	56	8.33%
Poor	7	1.04%
Not applicable	23	3.42%
Total	672	

Survey Participants:	795
Question Respondents:	672
No Response Count:	123
Response Rate:	85%

	Count	Percent of Question Respondents
Rate the following: Parent company's attitude towards the community		
Excellent	63	10.55%
Good	70	11.73%
Fair	11	1.84%
Poor	13	2.18%
Not applicable	440	73.70%
Total	597	

Survey Participants:	795
Question Respondents:	597
No Response Count:	198
Response Rate:	75%

Risk of Closing or Downsizing

	Count	Percent of Question Respondents
Rate the risk: Facility closing in the next 1 - 3 years		
High	25	3.50%
Moderate	70	9.80%
Low	619	86.69%
Total	714	

Survey Participants:	795
Question Respondents:	714
No Response Count:	81
Response Rate:	90%

	Count	Percent of Question Respondents
Rate the risk: Facility downsizing in the next 1 - 3 years		
High	28	4.02%
Moderate	77	11.06%
Low	591	84.91%
Total	696	

Survey Participants:	795
Question Respondents:	696
No Response Count:	99
Response Rate:	88%